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MEMORANDUM

TO: RETIRESAFE
FROM: B.J. MARTINO
RE: A SURVEY OF VOTER ATTITUDES IN VIRGINIA
DATE: OCTOBER 26, 2016

The Tarrance Group is pleased to present RetireSafe with the key findings from a survey of voter attitudes in Virginia. These key findings are based on telephone interviews with N=600 Registered “likely” voters throughout Virginia. Responses to this survey were gathered August 27-30, 2016 and the margin of error associated with a sample of this type is $\pm 4.1\%$ in 95 out of 100 cases.

EXECUTIVE SUMMARY

Our survey from late summer showed that a majority of Virginia voters, when explained the existing Certificate of Public Need requirements, agree that the current regulations go too far. Furthermore, another majority support comprehensive reform to phase out and replace the existing system.

Voters are more divided about the direction Virginia is headed. There is agreement on the issue of health care, particularly how the Governor and legislature address the issue of cost. This is important to Virginia voters, and is an area of their particular focus.

- Three-fourths of voters (76%) say it is extremely or very important for the Governor and legislature to work on the issue of health care. A bipartisan majority of voters say that the most important aspect for the Governor and state legislature to focus on is cost of care.
- In fact, costs are far more important than either access or choice by significant margins regardless of geography and demography as well.
- A 46% plurality of voters say there should be less regulation when it comes to health care. When read the specifics of the state Certificate of Public Need (COPN) requirements, a 59% majority say the regulations go too far.
- Generally speaking, a slim majority of voters agree that healthcare providers should not be required to have state regulators' approval period. However, once voters are focused on the specifics of COPN and the proposal to phase out and replace it, more voters agree that the current system should be changed.
- When read a proposal, a 56% majority of voters across the state support comprehensive reform that includes phasing out and replacing the current COPN

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system. As with the focus on cost, this is a bipartisan opinion, including 56% of Republicans and 59% of Democrats who support phasing out and replacing COPN.

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KEY FINDINGS

Direction of Virginia:

Now, thinking about things in Virginia-- Do you feel things in Virginia are going in the right direction, or do you feel things have gotten off on the wrong track?

A 49% plurality of voters in Virginia say the Commonwealth is going in the right direction, while 44% say it is off on the wrong track. However, intensity of opinion is more negative, with only 22% saying strongly right direction and 30% strongly wrong track.

Partisans are mostly polarized, although nearly a third of younger Republicans say things are right direction. Independents are a little more negative about things.

	Right direction	Unsure	Wrong track
All	49%	8%	44%
Washington, DC DMA	50%	10%	40%
Norfolk - Portsmouth – Newport News DMA	49%	7%	44%
Richmond – Petersburg DMA	52%	7%	41%
Roanoke – Lynchburg DMA	45%	6%	48%
Rest of state	45%	4%	52%
Men	51%	4%	45%
Women	47%	10%	43%
18-34	54%	12%	34%
35-44	60%	5%	35%
45-64	43%	6%	51%
65+	45%	9%	46%
GOP	24%	7%	69%
IND	44%	9%	48%
DEM	75%	8%	17%

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Health Care Issue Importance:

And thinking about issues important to you-- How important would you say it is to you for the Governor and state legislature to work on the issue of health care? Would you say that it is – • extremely important, • very important, • somewhat important, or • not at all important – to you?

Three-fourths of voters (76%) say it is extremely or very important for the Governor and legislature to work on the issue of health care.

There is only one significant segment where that number drops below a majority with Republican men at 49%, while Republican women rebound to 77%.

Regionally, the importance of the issue ranges from the high of 82% in the Roanoke media market, and low of 72% in the Washington DC market.

	Ext/Very	Somewhat	Not at all	Unsure
All	76%	17%	6%	1%
Washington, DC DMA	72%	21%	7%	1%
Norfolk - Portsmouth – Newport News DMA	81%	13%	5%	1%
Richmond – Petersburg DMA	74%	16%	8%	2%
Roanoke – Lynchburg DMA	82%	12%	4%	2%
Rest of state	76%	17%	6%	2%
Men	69%	21%	9%	1%
Women	82%	13%	4%	2%
18-34	77%	17%	6%	
35-44	74%	17%	8%	1%
45-64	74%	18%	6%	2%
65+	80%	14%	5%	2%
GOP	64%	23%	12%	1%
IND	76%	16%	6%	2%
DEM	87%	11%	1%	1%

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Which Part of Healthcare- Most Important:

Still thinking about health care-- What part of the health care issue would you say is most important for the Governor and state legislature to focus on cost of care, access to care, or choice of providers?

A majority of voters (51%) say that the cost of healthcare is the most important part of the issue for the Governor and legislature to work on.

The importance of cost climbs among those who say the healthcare issue is more important (54% among those who say extremely/very and only 27% among those who say it is not at all important or are unsure).

There are slightly gender and age trends that become significant when combined. Cost hits 57% important among younger women, and down to 42% among older men.

	Cost of Care	Access to Care	Choice of provider
All	51%	26%	16%
Washington, DC DMA	50%	32%	11%
Norfolk - Portsmouth – Newport News DMA	58%	18%	20%
Richmond – Petersburg DMA	51%	26%	16%
Roanoke – Lynchburg DMA	45%	24%	23%
Rest of state	53%	21%	15%
Men	48%	27%	17%
Women	55%	24%	14%
18-34	56%	31%	9%
35-44	57%	27%	12%
45-64	48%	26%	17%
65+	50%	22%	20%
GOP	51%	16%	24%
IND	52%	24%	13%
DEM	51%	36%	10%

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Close Hospital Importance:

*And-- How important would you say it is to your community to have a hospital nearby?
Is it Very important, somewhat important, not that important, or not at all important?*

Nearly four out of five (79%) Virginia voters say having a hospital nearby is very important to them.

This climbs to fully 86% of seniors, and also hits 86% at the other end of the age spectrum, among the 18-29 year olds. African-American voters are also slightly higher at 85% very important.

	Very	Somewhat	Not that	Not at all	Unsure
All	79%	17%	2%	1%	0%
Washington, DC DMA	77%	20%	3%	1%	0%
Norfolk - Portsmouth – Newport News DMA	82%	15%	2%		1%
Richmond – Petersburg DMA	70%	23%	5%	2%	
Roanoke – Lynchburg DMA	89%	9%	1%		1%
Rest of state	81%	17%		2%	
Men	73%	22%	3%	2%	0%
Women	84%	13%	2%		1%
18-34	83%	14%	1%	2%	
35-44	74%	21%	4%	1%	
45-64	75%	21%	3%	0%	1%
65+	86%	11%	1%	1%	1%
GOP	79%	15%	3%	2%	0%
IND	73%	22%	3%	1%	1%
DEM	83%	16%	1%		

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Health Care – Government Regulation:

And-- When it comes to healthcare, do you think we need more government regulation, less government regulation, or do you think we have about the right amount of government regulation of health care today?

A 46% plurality of voters say there should be less regulation when it comes to health care, and only 26% say there should be more regulation. The 2:1 margin continues, with 33% saying there should be much less regulation and 15% much more regulation.

Not surprisingly, 77% of Republicans say there should be less regulation. Among Democrats, a very narrow plurality (41%) say there should be more regulation (driven by more younger and male Democrats). Independents are much more in line with Republicans, with 50% wanting less regulation.

	More regulation	Right amount regulation	Less regulation	Unsure
All	26%	23%	46%	5%
Washington, DC DMA	25%	26%	44%	5%
Norfolk - Portsmouth – Newport News DMA	33%	20%	43%	5%
Richmond – Petersburg DMA	24%	22%	49%	5%
Roanoke – Lynchburg DMA	26%	24%	45%	5%
Rest of state	15%	19%	61%	5%
Men	27%	21%	47%	5%
Women	24%	25%	45%	5%
18-34	28%	26%	41%	4%
35-44	34%	22%	44%	1%
45-64	19%	21%	54%	7%
65+	26%	26%	42%	6%
GOP	11%	10%	77%	3%
IND	23%	19%	50%	8%
DEM	41%	38%	16%	5%

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Health Care Providers Need Government Approval:

Now thinking about healthcare providers, like hospitals, in Virginia-- Do you think a healthcare provider here in Virginia that wants to invest its own money to expand its ability to care for patients or to purchase new medical technology should be required to have state government regulators' approval?

When asked in a more generic sense, 50% say that healthcare providers that want to invest their own money to expand care or purchase technology should NOT be required to have state regulator's approval, while 43% say they should. Intensity of opinion is closer with 28% strongly yes and 31% strongly no.

Overall, 67% of Republicans say there should be no required approval, as 59% of Democrats say there should be. Independents are marginally more likely to say "no" at 49% to 41% yes.

Women are divided on this question overall, with even 34% of Republican women saying they should require approval. Among independents as well, the opposition is stronger among men, while independent women are divided.

	Yes	Unsure	No
All	43%	7%	50%
Washington, DC DMA	38%	10%	52%
Norfolk - Portsmouth – Newport News DMA	48%	5%	47%
Richmond – Petersburg DMA	45%	4%	51%
Roanoke – Lynchburg DMA	46%	8%	46%
Rest of state	46%	8%	46%
Men	40%	5%	55%
Women	46%	9%	45%
18-34	49%	5%	46%
35-44	44%	6%	50%
45-64	37%	7%	55%
65+	47%	9%	44%
GOP	28%	5%	67%
IND	41%	10%	49%
DEM	59%	8%	33%

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View of COPN Regulations:

Now, as you may know, any Virginia healthcare provider that wants to make a major investment, like purchasing a new CAT scan machine or making more hospital beds available to treat patients overnight, must first receive approval from the Virginia Health Commissioner. Virginia requires regulators to determine if a hospital’s proposed investment is needed in that community or not, and grant what is called a “Certificate of Public Need.” Based on what you know-- Do you think these regulations generally go too far, or do not go far enough?

When read the specifics of COPN requirements, a 59% majority say the regulations go too far, and only 21% say they did not go far enough. Only 6% say they are about right, and 15% unsure.

There is intensity behind the opinion, with 42% feeling strongly it goes too far.

Fully 75% of Republicans agree the regulations go too far, especially male Republicans (81%). A 58% majority of independents agree, including slightly more male and younger independents.

Meanwhile, while a 44% plurality of Democrats say the regulations go too far, 30% do say they do not go far enough.

	Gone too far	Are about right	Not far enough	Unsure
All	59%	6%	21%	15%
Washington, DC DMA	61%	7%	15%	17%
Norfolk - Portsmouth – Newport News DMA	53%	6%	30%	10%
Richmond – Petersburg DMA	62%	5%	22%	10%
Roanoke – Lynchburg DMA	51%	5%	25%	19%
Rest of state	68%	6%	9%	17%
Men	63%	7%	19%	11%
Women	55%	5%	22%	17%
18-34	58%	10%	20%	12%
35-44	59%	6%	22%	13%
45-64	60%	6%	19%	16%
65+	57%	5%	22%	16%
GOP	75%	3%	12%	10%
IND	58%	9%	19%	14%
DEM	44%	7%	30%	19%

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Replace Certificate of Public Need:

Now there is a proposal in the legislature to phase out and replace the current “certificate of public need” system for private investment in healthcare providers. It would create a streamlined permitting process with quality standards overseen by the Department of Health. It would also require health care providers to continue to take care of patients who cannot afford healthcare at no cost-- Would you support or oppose phasing out and replacing the Certificate of Public Need regulations this way?

Provided the proposal to phase out and replace the current system, a 56% majority support the proposal, while only 26% would oppose and 18% are left unsure.

The partisan differences disappear, as 56% of Republicans support phasing out and replacing, in fact a drop from those who say the regulations go too far. This suggests phrasing the changes as rolling back regulations would improve support among Republicans. Meanwhile, Democrats climb from only 44% say the regulations go too far to 59% for phasing out and replacing the current system.

Regionally, support is highest in the Richmond DMA (63%), and drops to a 48% plurality in the Washington DC DMA.

	Support	Unsure	Oppose
All	56%	18%	26%
Washington, DC DMA	48%	23%	29%
Norfolk - Portsmouth – Newport News DMA	57%	14%	29%
Richmond – Petersburg DMA	63%	18%	19%
Roanoke – Lynchburg DMA	60%	15%	26%
Rest of state	61%	17%	22%
Men	57%	16%	27%
Women	55%	20%	25%
18-34	62%	19%	20%
35-44	50%	19%	31%
45-64	55%	19%	26%
65+	57%	17%	26%
GOP	56%	18%	26%
IND	50%	20%	30%
DEM	59%	17%	24%

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