

SURVEY OF WASHINGTON, D.C. OPINION LEADERS

Conducted by Public Opinion Strategies
for the
Health Insurance Association of America

RESEARCH FINDINGS
SEPTEMBER 2000

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Preface and Method

On behalf of the Health Insurance Association of America, Public Opinion Strategies (POS) conducted a survey of 230 senior-level executives in associations and top lobbying firms. The survey took place between July 19 and August 2, 2000.

The survey sample was drawn by compiling a list of top associations and lobbying firms, then identifying the top two to three contact persons available from these organizations. An effort was made to identify and contact organizations and persons representing diverse ideologies, interests, and industries. Multiple contact attempts were made, in writing and by telephone, for each of the target organizations, allowing all organizations an equal chance to be included in the survey results. The survey's margin of error is $\pm 5.3\%$ in 95 out of 100 cases.

Findings

1. **This high-level audience is extremely optimistic about the direction of the country.**

Of this opinion leader sample, fully 88% describe the country as going in the right direction. Only 8% of those we surveyed felt the country was on the wrong track. These are extraordinarily strong numbers, particularly for an evaluation of the country's direction as a whole. (In contrast, a national survey of registered voters in July 2000 revealed that 49% of voters felt the country was going in the right direction, while 42% felt America was on the wrong track.)

- Looking at subgroups within the opinion leader sample, there are some modest variations in the data (men and Democrats are somewhat more optimistic than are women or Republicans), but these differences are very minor (especially when compared to similar dynamics in standard voter samples). Subgroup by subgroup, opinion leaders give strong, positive ratings on the direction of the country.

2. **Health care issues were mentioned most often as the most important problem facing the country today.**

Most important problem facing the nation

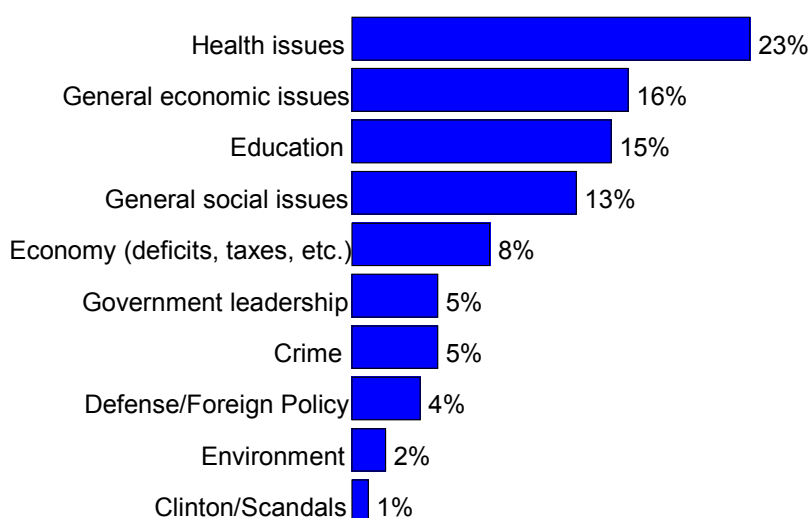


Figure 1

All survey respondents were asked an open-ended question on what they felt was the most important problem facing the country today. While individual responses to this question were extremely varied, aggregated health care issues were the largest single concern — fully 23% of those surveyed mentioned an issue related to health care.

Significant mentions were given to health care costs (mentioned by 8% of all respondents), availability of care (5%), the uninsured (3%), aid to the elderly (2%), and a patients' bill of rights (2%).

Aside from health care issues, other areas of significant concern include economic issues (mentioned by 16%), education (15%), and general social problems (13%, including all seven respondents who mentioned “decline in moral values” as their top concern).

- There were significant differences by sample type in perception of health care issues, perhaps reflecting the differences between associations and lobbying firms. While 28% of all association executives mentioned a health care issue as the “most important problem,” only 15% of lobbyists chose an item related to health care. Among lobbyists, education was mentioned as the top issue of concern (20%), while association members gave this lower priority (12%).
- As with the population as a whole, political self-identification certainly informs the data. While self-identified Republicans select social issues (most prominently, “decline in moral values”) as their chief concern (23%), Democrats focus on health issues (28%) and education (19%). Independents in the sample mirror Democratic responses, with 28% of independents choosing health issues as their top priority and 19% focusing on education.

3. On a list of potential priorities, respondents focused most of their attention on the economy and education.

Which issue should be the top priority of the president and the Congress?

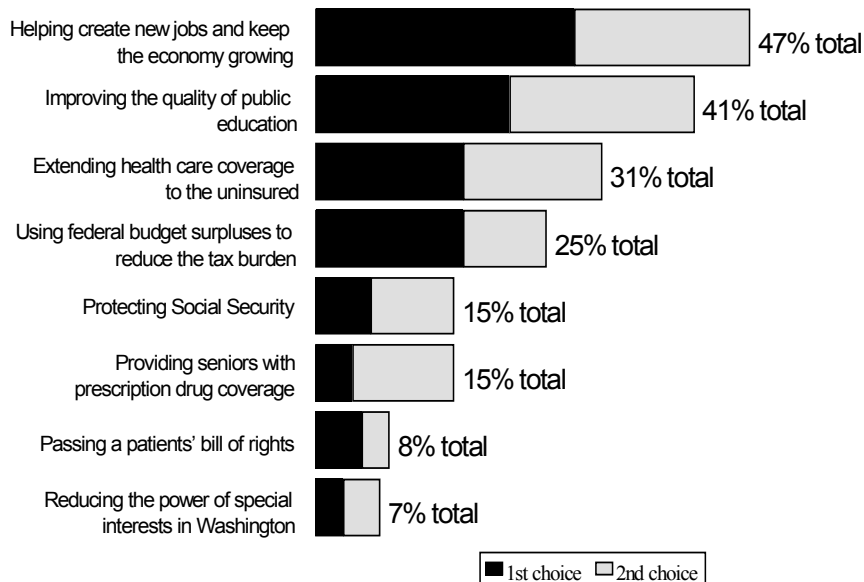


Figure 2

Respondents were given a list of issues and asked which should be the top priority of the president and the Congress. Examining the “first choice” responses only, “helping create new jobs and keep the economy growing” came out on top, with 28% of respondents choosing this as their top priority. Education was also rated highly, selected by 21% of respondents. “Extending health care to the uninsured” (16%) was the third highest rated choice, tied with “using the federal budget surplus to reduce the tax burden.”

In addition to the uninsured, two other health care-related items were tested, neither of which was highly rated. “Passing a patients’ bill of rights” was mentioned as top priority by only 5% of those surveyed, while 4% mentioned “providing seniors with prescription drug coverage.”

When combined with a second choice, jobs/the economy (47%) and education (41%) still dominate the landscape, but “extending health coverage to the uninsured” breaks away as a clear third priority, with a total of 31%. Prescription drug coverage for seniors and the patients’ bill of rights, even with two choices

combined, are clearly seen as of lesser importance — only 15% of respondents mention prescription drugs and a mere 8% focus any attention on the patients' bill of rights. The only issue rated lower than these two is “reducing the power of special interests in Washington,” mentioned by only 7% as a priority.

- Even among this audience, there were some distinct (though not surprising) gender differences. Men focused more on using the surplus to reduce taxes (28% combined 1st/2nd choice) than did women (16%). Women zeroed in on education (49%, compared to 39% among men) and the uninsured (43%, only 27% among men).
- Traditional partisan political values are reflected in the data, with Republicans focusing on the economy and tax relief at much higher rates than Democrats or independents. Democrats, not surprisingly, focused primarily on the uninsured and education, along with the economy and jobs. Independents in the sample were mainly concerned with education and the economy/jobs.
- Among the 23% of respondents who said that health care issues were the most important problems facing the U.S. today, extending health coverage to the uninsured emerges as their top priority: This is either the first or second priority for fully 51% of these respondents. The next closest health care item among this group is providing greater access to prescription drugs for seniors — a distant second, at 21%.
- Comparing these results to those obtained by a survey of registered voters, opinion leaders place vastly more importance on the economy and job creation than does the voting populace in general, while placing far less emphasis on protecting Social Security.

4. **Opinion leaders pick just one of 14 issues tested as likely to pass Congress this session — reducing the marriage penalty.**

How likely is legislation on this issue to pass this Congress?

(0 = will not pass / 10 = definitely will pass)

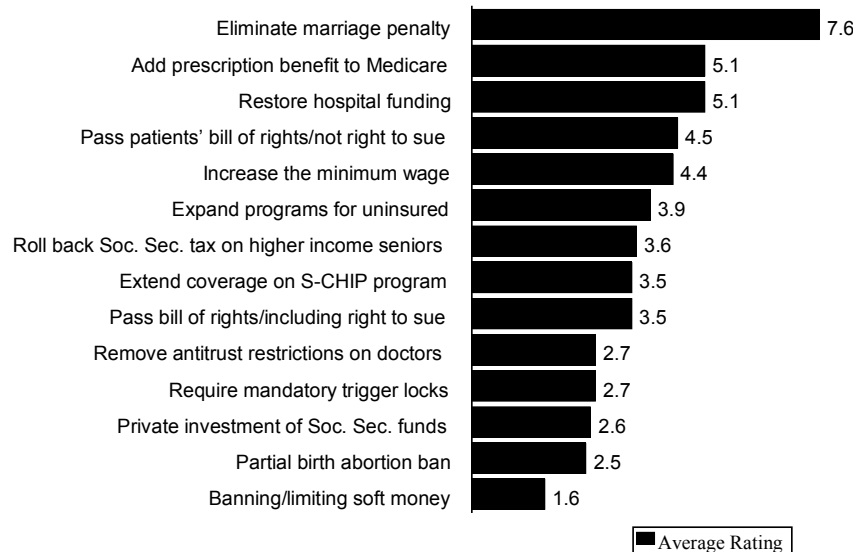


Figure 3

We tested 14 issues on this survey, focusing on those that are (or are likely to be) debated by this Congress, and asked respondents to tell us which ones they believed were likely to pass. A 0-10 scale was used, with zero meaning that no major legislation would pass and 10 meaning that legislation would definitely pass.

Among these 14 issues, only eliminating or reducing the marriage penalty was seen as likely to pass this Congress — 60% rated it an 8–10 on the “pass likelihood” scale, with an average rating among all respondents of 7.6. *No other issue received more than a 20% on an 8–10 rating or received an average score of more than 5.1 on the scale.*

Of more interest, perhaps, is what opinion leaders definitely think *will not* pass during this Congress. Seven of the 14 issues tested had at least a 50% rating on the 0-3 portion of the ten-point “pass likelihood” scale.

Leading this group of issues is limiting or banning soft money, with fully 82% of opinion leaders rating this as 0-3 on our scale, with an average rating of 1.6 (out of ten). Other issues also seen as having little chance of passing include a ban on partial birth abortion (average rating of 2.5/10), private investment of Social Security funds (2.6/10), mandatory trigger locks (2.7/10), and removing antitrust restrictions on doctors to allow group negotiations (2.7/10).

Likelihood of selected health care issues passing in the 106th Congress		
"Add a prescription benefit to Medicare"	Avg. = 5.1	14% rate 8-10
"Increase federal funding to hospitals and home health care providers that was cut back as part of the 1997 balanced budget agreement"	Avg. = 5.1	20% rate 8-10
"Pass the patients' bill of rights ... allow independent review ... not include the right to sue a health plan or employer"	Avg. = 4.5	9% rate 8-10
"Expand programs that provide health insurance to children or coverage for other Americans"	Avg. = 3.9	6% rate 8-10
"Extend health care coverage to parents of children covered by the S-CHIP program"	Avg. = 3.5	3% rate 8-10
"Pass the patients' bill of rights ... including the right to sue health plans or an employer"	Avg. = 3.5	4% rate 8-10

Table 1

- Clearly, this group of respondents is savvy enough that they evaluate political "reality" in comparable ways. While some standard partisan filters come into play on these issues (Republicans, for example, are more likely than Democrats or independents to view the marriage penalty repeal as "passable"), there is more agreement on these questions than among the priority and concern questions.

5. Opinion leaders view the potential focuses of each of the two major presidential candidates as clearly different.

Respondents were asked follow-up questions to the "Congress will pass/not pass" sequence. For both George W. Bush and Al Gore, opinion leaders were asked if they thought there were any issues that wouldn't pass this year, but would be very

likely to pass during the next Congress and under that particular candidate's administration. As one might expect, clear and somewhat partisan views emerged.

Under a Bush administration, respondents focused on the increased chance of passage of several economic proposals, including partial privatization of Social Security, a repeal of the marriage penalty, and a rollback of Social Security tax on higher income recipients. A good number of respondents also mentioned a restriction on partial birth abortions and a patients' bill of rights that includes independent review (but not the right to sue health plans or employers).

More likely to pass under a Gore administration, opinion leaders believe, are a patients' bill of rights (including the right to sue health plans and employers), a Medicare prescription drug benefit, and expanded health coverage to the uninsured. Mandatory trigger locks on guns and a minimum wage increase are also mentioned as having an increased chance of passage.

6. Opinion leaders almost universally mention that prescription drug coverage for seniors will be debated in the next Congress (and perhaps beyond).

We asked each respondent to tell us what one or two health care issues were most likely to be debated in the next Congress and beyond. While a variety of answers were given, respondents focused on three primary issues: prescription drugs for seniors, increased access to health care for the uninsured, and the passage of some form of patients' bill of rights. Foremost among these three issues, however, was the prescription drug benefit — almost every single respondent mentioned this as an issue that would continue to be on the table.

Other health care issues mentioned by opinion leaders included government exerting price controls on the health care economy, nationalized health care, medical privacy, expansion of the S-CHIP program, and issues of aging and long-term care.

"In the next session of Congress, we will hear continued debate on Medicare reform, prescription drug benefits, and other reforms and managed care reform in general."

"I think long-term care insurance will be debated."

"There will be continued debate on a prescription drug benefit for Medicare, expanded coverage for the uninsured, and continued discussion on rising medical costs."

"Patients' Bill of Rights, health insurance coverage under Medicare for seniors, and I should say extending Medicare to cover prescription drugs. Some sort of an expansion of the CHIP program."

We also asked a sampling of respondents to tell us which health care or health care policy issues that are perhaps not a priority today could emerge and be debated during the next Congress. Responses on this question were varied and

included extending health care to the uninsured, HMO reform, parity for mental health coverage, long-term care, extension of the S-CHIP program, universal health care, gene therapy, wellness/preventive coverage, and issues dealing with aging (which was frequently mentioned in tandem with long-term care issues).

"Medicare coverage including Alzheimer's and other mental health problems of seniors. Well, maybe issues related to aging in general."

"I would expect that national health insurance ... will be brought back into the public eye by Congress."

"There will be debate on the quality of health care. They will be discussing new managed care rules as to who makes the final decision, HMOs or doctors."

"I think probably not the next Congress, but down the road more debate on long-term care, more baby boomers facing that, and people living longer. I also think the ethics issue with the longevity, how to deal with cost issues associated with longevity. We will live longer, but it isn't going to be free."

"I think the whole elderly and the HMOs issues are on a collision course with liability and how all that operates."

7. Outside of health care, other potential areas of discussion in the next Congress include (among others) Social Security, privacy, tax relief, education, and the global economy.

In addition to the two questions related to health care, respondents were asked to identify issues likely to become prominent in the next Congress and beyond. Receiving the most emphasis were Social Security (both saving the existing system and moving toward privatization) and privacy (related to both the Internet and human genetics/medical information). Prominent mention was also made of tax relief/reduction, education, the globalization of the economy and the future role of the World Trade Organization, national defense, general budget issues, and campaign finance.

"Technology issues come to mind. Just in general. Well, especially as it relates to privacy."

"The environmental policy will keep growing in importance. The issue of what to do with the surplus will get bigger. Reduce taxes, pay down the debt, prop up Social Security, or whatever."

"I think national defense. I think the troop readiness and the size of the armed forces. I would say restructuring the tax code, even though that's been discussed. I think there will be increased attention to that."

"I feel privacy in general will be a hot topic. As the baby boomers get older, there will be more and more talk about Social Security, who pays for it, and just how much of it there is to go around."

“Having privacy on the Internet is going to have to be addressed here soon. Also, the integration of China into the WTO will be very big.”

8. George W. Bush is given a modest edge in the presidential race. Senate Republicans are given a huge edge. The race to control the House is seen as close to a pure toss-up.

For each of the three federal elections, we asked respondents to rate on a scale of 0-100 the chance they felt each major presidential candidate or major party had to win their respective contests. To prevent partisan bias on the response scale, for half the respondents the low value on the scale was assigned to Al Gore and the Democratic party; the other half of the respondents were read the questions with George W. Bush and the Republican party at the low end of the scale.

After the survey was completed, the data was converted so that all 230 responses could be evaluated using the same 0-100 scale, with a number closer to zero denoting Gore/the Democrats and numbers closer to 100 indicating Bush/the GOP.

In the race for president, George W. Bush is given a modest edge, with respondents giving an average rating of 58 on the 0-100 scale (again, 0 = Gore / 100 = Bush). Fully 42% of those surveyed gave a rating between 60-100 (indicating some degree of advantage for Bush), while only 13% gave a rating of 0-40 for Gore (which would indicate some degree of advantage for Gore).

- Clear differences by party emerge, with Republicans giving an average rating of 66 on this scale, independents reporting 58, and Democrats, 51. Clearly, at the time of the survey, even self-identified Democrats viewed Gore's chances as no better than a toss-up (even “Strong Democrats” give an average rating of 49), while Republicans and independents give the advantage (to differing degrees) to a Bush candidacy.
- There is no statistical difference on this question by sample type — both association executives and lobbying firm executives give essentially identical ratings on this question.

With respect to control of the Senate, Republicans are given an overwhelming edge by respondents, with an average rating of 74 on the 0-100 scale (0 = Democrats / 100 = GOP). Three out of four (73%) respondents gave a rating between 60-100; only 3% gave a rating between 0-40.

- The huge Republican advantage on this question extends beyond party affiliation. The average rating among Republicans is 79, among independents 72, and among Democrats the average score is 72.

Finally, in relation to which party will control the House of Representatives, this question is viewed as almost a pure toss-up, with an average rating of 48 on the 0-100 scale (0 = Democrats / 100 = GOP).

While the majority of respondents give a rating between 41-59 (most likely indicating no strong edge to either party), Democrats show a slight advantage among respondents when looking at the distribution of percentage — while 17% of those surveyed give the GOP an edge (giving a rating of 60-100), 26% give some clearer advantage to the Democrats (giving a rating of 0-40).

- This is a very tightly perceived race, even among partisans. Republicans give a rating of 52 on this question, while Democrats (expressing slightly more confidence in their own party's ability to re-capture control of the House) give an average rating of 43. Independents give an average score of 49.

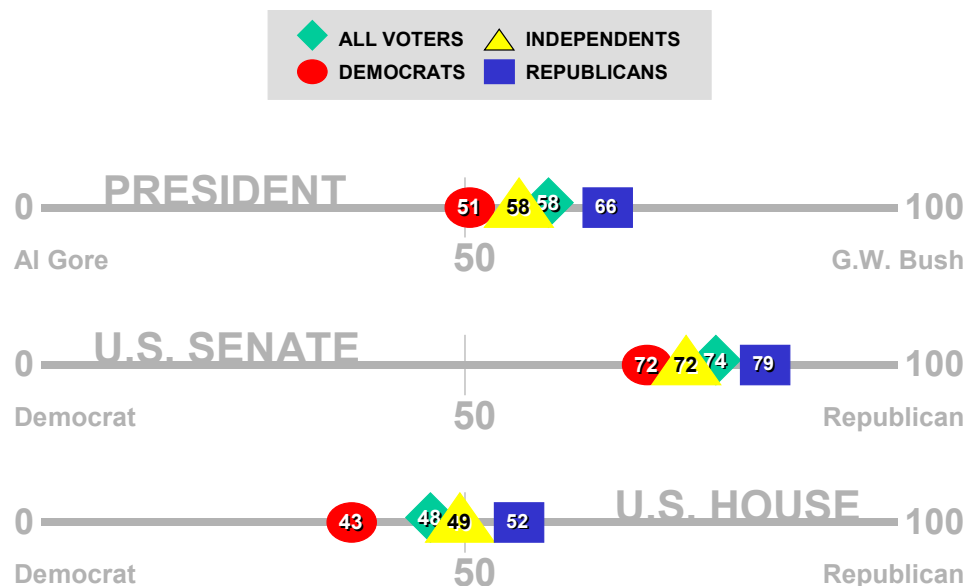


Figure 4

9. **One of the objects of this research was to help understand the media habits of opinion leaders.**

PRINT MEDIA: Not surprisingly, the *Washington Post* is read almost universally by opinion leaders in Washington, D.C. They also rely heavily on a variety of other print information sources.

More than nine out of 10 (93%) opinion leaders in this survey report reading the *Washington Post* on a daily basis. The next most frequently read daily print information source is the *Wall Street Journal* (58%), followed by the *New York Times* (44%). As for *USA Today* (13%) and the *Washington Times* (13%), they are read by a much smaller but still somewhat significant number of opinion leaders. All other daily print sources are read by less than 5% of those polled.

Respondents were also asked about other publications they might read. Fully 62% of those polled report reading *Roll Call*, 49% report regularly reading *The National Journal*, and 48% say they read *Congressional Quarterly*. *The Hill* is read by 29% of those polled.

CABLE WATCHING: With regard to cable television channel viewing habits, responses are varied and diverse.

The majority of opinion leaders in our poll (52%) report that they enjoy watching CNN as part of their cable viewing package, followed by 24% who say they watch C-SPAN.

Other prominently watched cable channels include ESPN (watched by 18%, almost exclusively men), the History Channel (17%), MSNBC (13%), Discovery Channel (13%), CNBC (12%), and A&E (11%). A variety of other cable channels are watched and enjoyed by opinion leaders, though all receive less than 5% viewership.

PUBLIC AFFAIRS PROGRAMMING: Of the specific shows tested, *Meet the Press* is the most watched public affairs program; *Fox News Sunday* is the least watched.

We tested seven main public affairs programs that opinion leaders might watch regularly. A majority of opinion leaders (58%) report regularly watching *Meet the Press*, followed by 44% who watch *This Week with Sam and Cokie*, and 40% who regularly watch *Face the Nation*. About one-third report watching *Crossfire* regularly, 25% watch *Hardball*, and 24% report watching *Larry King Live*. Only 18% say they regularly watch *Fox News Sunday*.

Other public affairs programming that respondents watch regularly include *The Newshour with Jim Lehrer* (14%), *The McLaughlin Group* (12%), and *Washington Week in Review* (10%).

ON-LINE BEHAVIOR: More than nine out of 10 opinion leaders report using the Internet weekly, though total hours of usage are fairly moderate.

When asked how many hours per week, on average, they spent on-line (other than to send or receive e-mail), 93% report using the Internet to some degree, making this audience an extremely “wired” group.

However, despite this heavy penetration of the Internet, the average number of hours spent by respondents on-line is only about seven hours a week. The plurality of opinion leaders report being on-line between four and 10 hours weekly; 14% say they are on-line between 11-20 hours. Only about 3% of this audience report weekly Internet usage of more than 20 hours a week.

- Opinion leaders from the lobbyist sample report lower average amounts of on-line usage — while 35% of association respondents say they use the Internet between 0-3 hours a week, fully 56% of lobbyist respondents reported this lower end usage. The weekly average for association executives is eight hours; for lobbyists, it is six hours.

10. The demographic profile of the opinion leaders we surveyed is a middle-aged male who is more likely to be a Democrat than a Republican.

We asked a limited number of demographic questions to opinion leaders on this survey, which allowed us to profile them demographically as a group.

- The overwhelming majority of opinion leaders are male (78%). Lobbying respondents were even more likely to be male than respondents from associations — 86% of the lobbying sample in the survey are men, compared to 73% of association respondents.
- Partisanship leans to the Democratic, with 42% of all respondents identifying themselves as Democrats, 34% as Republicans, and 23% as independent/no affiliation.
- Association respondents are evenly split on partisanship — 35% are Republicans and 36% Democrats. Lobbying respondents are heavily Democratic (33% GOP, 52% Democrat). By gender, 36% of male respondents identify themselves as Republican, compared to 42% Democratic. Among women, the spread is greater: 29% Republicans, 43% Democrats.
- Not surprisingly, the vast majority of the sample is between the ages of 35-64 years old, with the largest group being 45 to 54 years old. This holds true for both association and lobbyist respondents, though lobbyists do tend to be slightly older on average.