

To: Progressive Policy Institute
Fr: Expedition Strategies
Re: National Polling on Economic and Health Care Priorities
Date: July 24, 2024

This memo outlines the results of recent polling¹ conducted nationwide focusing on voter priorities around economic issues and healthcare. The survey was conducted after President Biden's debate performance and before his announcement to leave the race.

Voter concerns about the economy remain high, particularly as it relates to inflation and the cost of food and housing. Democrats have struggled for years to win the confidence of the American people when it comes to economic issues, and we see that in this research. The poll also provides concrete ideas for some steps Democrats can take to improve or solidify this position among key groups such as non-White voters or younger voters under 35.

Though voters prioritize food and housing costs as economic concerns, health care is the third top concern related to inflation and rising costs, and voters generally trust Democrats to address health care related policy. When looking deeper into specific health care related costs, concerns about the cost of insurance (28% greatest health care cost concern%) outweighs concerns about the cost of prescription drugs (11%).

And while 45% voters say capping the cost of key prescription drugs like insulin was the most important Biden Administration health care policy, only 8% say Congress should prioritize expanding negotiations to reduce the price of more medicines under Medicare after the next election, suggesting voters do not view continued efforts in this space as a top priority compared to other areas of the economy.

Specifically, moving forward, the poll shows that voters want to see more action on investment in manufacturing (30% say this is the most important policy for Congress to pursue), and more action by the IRS to ensure that billionaires and millionaires pay the taxes they owe (24% say this is the most important policy to pursue, including 27% of Hispanic respondents and 25% of African American respondents for whom this was the top priority). These policies are far more compelling to voters than are a variety of other forward-looking economic ideas that have been proposed such as cracking down on small food package sizes or expanding Medicare negotiations to set the price of more medicines.

The Economy

On an open-ended question where voters were asked to volunteer the most important issue they say their Congress person should address, a quarter of voters (24%) say the economy, followed by immigration. This is consistent across demographics, except for Republicans and conservatives who are narrowly more concerned with immigration. Only 3% of voters volunteered health care as their most important issue.

¹ Expedition Strategies conducted 2300 interviews nationwide with likely November 2024 voters. The interviews were conducted June 24-July 8, 2024. The margin of error for overall results is $\pm 2.04\%$.

Most Important Issue

What would you say is the most important thing your Member of Congress should focus on?																	
Q1; Ranked by All	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
Economy	24	24	24	21	27	24	19	26	28	26	24	23	26	23	26	21	22
Immigration	16	17	15	4	9	33	2	11	34	20	14	8	12	21	17	16	5
Government Reform	11	12	9	9	13	9	13	12	7	11	10	8	11	12	11	12	10
Abortion	5	4	7	11	5	1	10	4	1	5	7	8	6	4	6	5	4
Values	5	6	4	7	5	4	6	5	4	5	5	7	4	4	5	7	4

*Showing top five concerns.

Inflation is a significant economic concern for voters, who almost universally (90%) say they are concerned about inflation and rising costs, with two-thirds (67%) saying they are very concerned. However, while health care ranks third (13%) in terms of what types of costs voters are most concerned about, it is far behind food costs (22%) and housing costs (19%) in voters' minds with African American voters (32%) and young voters (26%) being most concerned about housing.

Cost Type Most Concerned

Which type of cost concerns you the most ?																	
Q3; Ranked by All	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
Food	22	19	25	17	20	28	19	20	28	27	19	20	22	23	23	21	16
Housing	19	19	19	31	18	11	24	23	10	12	25	26	22	15	18	16	32
Health care	13	13	13	20	15	6	20	12	7	12	17	12	9	15	15	12	9
Taxes	11	13	10	4	12	16	8	12	14	11	10	10	12	12	11	12	12
Gas and energy	10	15	6	2	8	19	3	10	18	15	7	5	10	13	11	11	3

*Showing top five concerns.

Health Care Costs

When asked what type of health care cost is of greatest concern to their families, the cost of insurance is the biggest concern to voters (28%) is at the top of the list, followed by out-of-pocket costs (16%) This is consistently true across demographics though concern about the cost of doctors and hospitals is slightly higher among Republicans (14%) and non-college White voters (16%), and African-American voters are nearly tied on cost of insurance (19%) and out of pocket costs (20%).

Greatest Health Cost Concern

Which aspect of the cost of health care is the greatest concern to you and your family? Is it:																		
Q8; Ranked by All	All	Und	Gender		Ideology			Party ID			Wh Edu		Age			Race		
			M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
Cost of health insurance	28	21	28	27	24	28	31	27	25	31	28	34	26	29	28	30	20	19
Out of pocket costs	16	18	15	16	21	15	12	19	16	11	12	17	15	17	15	15	16	20
The cost of doctors and hospitals	12	14	13	11	10	13	12	9	12	14	16	8	10	10	13	12	13	10
The cost of prescription drugs	11	8	10	12	10	11	12	10	12	11	13	9	9	9	13	12	13	7
Having bills rejected by insurance companies	9	11	8	11	12	8	9	12	8	8	8	8	11	11	8	8	15	13
The size of deductibles	8	9	9	7	7	8	7	6	9	9	6	7	7	10	7	7	9	10
Surprise medical bills	5	6	4	6	5	5	5	5	4	6	4	5	8	6	4	5	5	7
The cost of co-payments	4	4	5	4	5	3	5	5	4	4	4	3	7	2	5	4	7	4
Medical debt	4	3	3	4	4	3	3	4	5	3	3	5	5	4	3	4	1	8
Don't know	4	6	5	3	1	4	4	3	5	3	5	3	2	3	5	4	1	2

An even higher percentage of voters (37%) say the cost of health insurance is the aspect of health care they'd most like to see Congress address, particularly among Hispanic voters (42%). Concern about costs of prescription drugs (18%) come in a distant second -- this is true regardless of ideology or party affiliation.

Congressional Priority Preference

Which aspect of health care would you most like Congress to address?																		
Q9: Ranked by All	All	Gender		Ideology			Party ID			Wh Edu		Age			Race			
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA	
The cost of health insurance	37	39	36	36	37	39	38	34	39	36	37	37	43	35	36	42	38	
The cost of prescription drugs	18	17	18	18	16	18	16	17	20	18	18	17	11	20	18	19	11	
The cost of hospital services	13	12	14	12	14	13	12	12	15	14	11	16	10	13	13	14	10	
The cost of dental care	7	7	7	7	6	7	8	7	6	7	5	6	7	7	6	7	11	
The cost of preventative care	7	7	7	7	8	7	7	8	6	6	9	7	9	6	7	7	6	
The cost of surgery	3	4	2	4	3	2	3	3	3	4	3	3	3	3	3	0	2	
The cost of eye care	1	1	1	2	0	1	2	1	1	1	0	0	2	1	1	1	5	
All of the above	3	3	3	3	3	2	3	4	2	3	3	4	2	3	3	0	5	
Something else	9	9	9	9	9	11	10	10	7	8	10	6	11	9	9	7	11	
Don't know	2	2	2	2	1	3	1	3	2	3	2	2	3	2	2	2	0	

Voter Priorities

Similar to the questions comparing a Democratic candidate's stance on addressing health care costs to a Republican's stance on health care costs, when voters are asked about health care policy in the context of other areas of the economy, health care costs and programs become less of a priority compared to other areas of the economy.

Nearly a third of voters (30%) say Congress should "encourage and provide more investment in US manufacturing, energy production, and other industries," and 24% said Congress should pursue "increased IRS action to ensure billionaires and large successful companies pay taxes."

- Conservatives and Republicans in particular prioritize investment in manufacturing, while Democrats and liberals prioritize IRS action. Political independents are almost evenly split between investment and IRS action.
- Hispanic (27%) and African American (25%) voters are also more likely to prioritize IRS action, along with voters under 35 (27%).

Comparatively, only 10% said "continue to lower the cost of insurance provided under the ACA to put more pressure on insurance companies to lower prices," and 8% said "expand negotiations to reduce the price of medicines covered under Medicare" – this is consistently rated low across demographics.

Most Important Policy for Congress

Which of the following is the most important policy for whoever controls Congress after the next election to pursue?																	
Q24; Ranked by All	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
Encourage and provide more investment in US manufacturing, energy production and other industries	30	36	24	11	25	49	12	25	51	34	32	23	33	31	33	25	14
Increased IRS action to ensure billionaires and large successful companies pay taxes	24	23	25	46	27	7	44	24	6	18	31	27	23	24	24	27	25
Continue to lower the cost of insurance provided under the ACA to put more pressure on insurance companies to lower prices	10	9	11	10	10	10	10	11	10	10	10	11	9	10	10	10	14
Expand access to job training so Americans can get good work at good pay	10	9	12	9	10	11	9	12	10	11	9	11	11	10	10	7	11
Expand negotiations to reduce the price of medicines covered under Medicare	8	8	7	7	9	7	8	7	8	9	7	6	5	9	8	7	7
Stop companies from reducing the size of food packages without reducing prices	7	6	8	6	8	6	8	5	7	7	4	8	9	6	6	10	14
Increase loan forgiveness	6	3	8	9	6	2	6	8	2	4	4	11	6	3	4	7	11
Don't know	5	6	4	2	4	7	2	8	6	6	3	4	5	6	5	8	3

Voters do see the importance of addressing health care costs when it comes to addressing policies implemented by the Biden Administration and Democrats in Congress, particularly when it comes to capping insurance costs.

When asked which health care related Biden and Democratic Party accomplishment was most important, 45% said capping the cost of key prescription drugs such as insulin, 19% said health care premiums being lowered for those buying coverage through the ACA, 17% said Medicaid expansion, and 10% said reducing hearing aid prices.

- At least four-in-ten voters across most demographics say capping insulin costs are the most important health care related action, including nearly half of voters under 35 (48%) – Hispanic voters are more divided between insulin costs, health care premiums, and Medicaid expansion.

Most Important Democratic Accomplishment

Which of the following health care related Biden and Democratic Party actions do you feel was the most important ?																	
Q22; Ranked by All	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
The cost of key prescription drugs such as insulin getting capped	45	42	48	48	48	42	47	40	48	45	53	48	37	48	49	33	40
Health care premiums have been lowered by \$800 for those buying coverage through the Affordable Health Care Act or ACA	19	20	19	21	27	12	20	24	14	19	20	22	21	18	19	21	22
Medicaid has been expanded in 39 states, which means states led by both parties	17	20	15	23	13	17	19	16	18	18	16	15	23	15	17	23	16
Hearing aid prices have been lowered by as much as \$3,000 by no longer requiring prescriptions	10	10	9	6	6	17	10	8	11	7	9	8	9	11	8	9	17
Don't know	8	8	9	3	6	12	4	12	10	10	3	6	10	9	7	14	5

When asked about a range of economic policies, voters still said capping the cost of key medicines such as insulin (21%) indicated the Biden Administration and Democrats are making economic progress, followed by student loan forgiveness (14%), unemployment (13%), and IRS reforms cracking down on tax evaders (13%).

- Democrats and liberals are more likely to say unemployment is the biggest indicator of economic progress. This may be due to Democrats and liberals being more likely to trust Democrats to succeed on the economy, and drug costs or medical care prices being a more tangible and trustworthy indicator of progress from Democrats to people more to the middle or right on the political spectrum. Hispanic voters were also more likely to say low unemployment.

Biden Administration Economic Progress

Which of the following do you think indicates that the Biden Administration and Democrats are making economic progress?																	
Q23; Ranked by All	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
The cost of key medicines such as insulin have been capped	21	16	26	11	27	22	19	23	23	20	24	22	22	21	22	20	22
Billions in student loans have been forgiven	14	11	16	19	12	12	11	18	13	14	11	17	9	14	13	12	18
Unemployment is the lowest it has been in 40 years	13	14	12	22	17	3	26	8	4	7	16	16	15	11	11	20	16
IRS reforms are cracking down on millionaire tax evaders, which is sending money to deficit reduction	13	15	11	20	13	9	20	12	7	11	15	17	12	12	13	12	18
Private investment in manufacturing, utilities and energy production is up by more than \$700 billion	8	7	9	10	11	4	12	5	7	9	11	7	7	9	10	5	6
Hearing aid prices have been lowered by as much as \$3,000 by no longer requiring prescriptions	7	10	5	2	4	14	2	6	14	11	5	6	8	7	8	3	8
Health care premiums have been lowered by \$800 for those buying coverage through the ACA	5	6	4	4	6	4	6	4	4	5	5	3	6	5	5	7	3
Don't know	19	21	16	11	10	32	5	23	28	24	14	11	20	21	19	20	8

While voters value what has happened with drug prices under the Biden Administration, they do not express a strong desire to expand efforts on price control – their priorities lie in other economic arenas and, within the health care space specifically, are more focused on the cost of insurance. Despite this, Democrats do have an advantage on health care policy, and voters’ positive perception of policy victories specifically tied to pocketbook issues like capping the cost of drugs is a key *past* victory Democrats can highlight as part of a broader range of policy goals focused on other sectors such as manufacturing investment or addressing tax issues.

Party Trust and Messaging

Republicans continue to hold more voter trust in terms of broad economic policy, but Democrats are considered more trustworthy specifically within the health care policy sphere.

- 51% trust **Republicans** more on “setting policy related to economic issues related to jobs and inflation” compared to 44% who trust Democrats more. Independents (48%) are more likely to trust the Republican party while moderates (54%) are more likely to trust Democrats;

Most Trusted Party in Congress – Economic Issues

Which party in Congress do you trust more when it comes to setting policy related to **economic issues related to jobs and inflation**?

Q21	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
Difference	-7	-19	+4	+71	+13	-84	+77	-8	-87	-33	+9	+5	-7	-11	-14	+12	+37
Democrats	44	38	49	83	54	7	88	40	6	31	53	50	44	42	41	53	67
Republicans	51	57	45	12	41	91	11	48	93	64	44	45	51	53	55	41	30
Don't know	5	5	5	5	5	3	2	12	2	5	3	5	5	5	4	5	4

- 50% trust **Democrats** more when it comes to “setting policy related to the price of prescription medications” compared to 40% who trust Republicans more, including a plurality of independents and moderates. More than half of voters under 35 (59%) say Democrats;

Most Trusted Party in Congress – Prescription Prices

Which party in Congress do you trust more when it comes to setting policy related to **the price of prescription medications**?

Q19	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
Difference	+10	+1	+17	+75	+43	-72	+89	+15	-72	-17	+26	+28	+14	+2	+3	+23	+60
Democrats	50	45	54	85	66	9	93	48	10	36	59	59	51	47	47	56	75
Republicans	40	44	37	10	23	81	4	33	82	53	33	31	37	45	44	33	15
Don't know	10	11	9	6	11	10	3	18	8	10	8	10	12	8	9	10	10

- 48% trust **Democrats** more when it comes to ensuring that U.S. drug makers continue to innovate and develop new treatments for difficult health problems, including a plurality of political independents and nearly two-thirds of moderates.

Most Trusted Party in Congress – Innovation

Which party in Congress do you trust more when it comes to setting policy related to **ensuring that the U.S. drug makers continue to innovate and develop new treatments for difficult health problems?**

Q20	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
Difference	+7	-6	+17	+6	+14	+7	+89	+10	-77	-18	+16	+18	+10	-3	-2	+30	+56
Democrats	48	41	54	82	64	8	93	45	8	36	53	59	48	44	44	60	74
Republicans	41	47	37	10	25	82	4	35	85	54	37	31	38	47	46	30	18
Don't know	10	12	9	8	10	10	3	20	8	10	9	10	14	9	10	10	8

Voters are also narrowly more likely to support Democrats for federal office when given the choice between two perspectives on lowering health care costs:

- 50% prefer a Democrat who supports lowering health care costs by reforming health insurance, ending surprise medical billing, and ensuring drug prices are lowered, compared to 47% who prefer a Republican who wants to lower costs by increasing competition, transparency, and predictability.

Contrasts – Health Care Costs

Which candidate would you be more likely to support for Federal office?

Q25	All	Gender		Ideology			Party ID			Wh Edu		Age			Race		
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA
Difference	+3	-6	+13	+72	+34	-77	+85	+12	-85	-21	+15	+55	+11	-7	-4	+15	+60
A Democrat who supports lowering health care costs by reforming health insurance, ending surprise medical billing and ensuring drug prices are lowered	50	45	55	85	65	10	92	52	7	38	56	61	53	45	47	55	78
A Republican who supports lowering health care costs by increasing competition, transparency and predictability	47	51	42	13	31	87	7	40	92	59	41	36	42	52	51	40	18
Don't know	3	4	3	2	4	3	1	8	2	3	2	2	5	3	3	5	4

However, when asked about a Democrat focused on lowering health care costs and a Republican focused on broader economic policy, voters are nearly tied, reflecting the ongoing Democratic Party struggle to connect with voters on economic issues.

- 49% prefer a Democrat who supports lowering health care costs by reforming health insurance, ending surprise medical billing, and ensuring drug prices are lowered, compared to 48% who say they prefer a Republican who supports lowering taxes and regulations and reducing federal spending.

Contrasts – Federal Spending

Which candidate would you be more likely to support for Federal office?																		
Q26	All	Gender		Ideology			Party ID			Wh Edu		Age			Race			
		M	F	Lib	Mod	Cons	Dem	Ind	Rep	<Coll	Coll+	<35	35-49	50+	Wh	Hisp	AA	
Difference	+1	-13	+11	+72	+31	-81	+83	+4	-84	-29	+17	+18	+6	-9	-8	+19	+56	
A Democrat who supports lowering health care costs by reforming health insurance, ending surprise medical billing and ensuring drug prices are lowered	49	42	54	85	64	8	91	49	7	34	58	57	51	44	45	57	75	
A Republican who supports lowering taxes and regulations and reducing Federal spending	48	55	43	13	33	89	8	45	91	63	41	39	45	53	53	38	19	
Don't know	3	3	3	85	64	8	1	6	2	2	2	4	3	3	2	5	6	