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June 2019

Bipartisan Policy Center & American Heart Association

RURAL HEALTH CARE POLLING PRESENTATION

Key Points

1 Rural voters are more likely than non-rural voters to:

- Say **easy access to medical specialists** (54% vs. 33%) and **access to quality health care** (47% vs. 34%) is a **problem in their local community**.
- Say it is **difficult to access a behavioral/mental health professional** in their local community (27% vs. 16%).
- Agree **distance to receive care is a barrier to receiving medical services or treatment** (50% vs. 37%).

2 Rural voters identify the following **barriers to accessing medical services or treatment**:

- A majority of rural voters agree the **cost of health care** (71%), **cost of prescription drugs** (70%), **appointment availability** (56%), and **distance to receive care** (50%) are **barriers to accessing medical services or treatment**.

3 Rural adults in Iowa, North Carolina and Texas are most likely to **use telephone and email** to reach their doctor or to receive medical care remotely

- And, **half of rural adults in Texas (55%) say they are likely to use a mobile app**, if it were available to them, to reach their doctor or to receive medical care remotely.

4 Prioritizing rural health problems spans party lines.

- Making it easier to access health care in rural communities is important to a strong majority of Democrats (92%), Republicans (93%), non-rural (91%), and rural (95%) voters.

5 Rural healthcare is poised to be a 2020 election issue.

- Three in five voters (61%) would be **more likely to vote for a candidate in the 2020 election cycle** who says he or she will **address access to health care** in rural America, including a **majority of Democrat (73%) and Republican (53%) voters**.

Methodology

This poll was conducted between May 23 – May 25, 2019 among a national sample of 1,995 Registered Voters, and 200 rural adults in Iowa, 200 rural adults in North Carolina, and 200 rural adults in Texas. The interviews were conducted online and the data were weighted to approximate a target sample of adults based on age, educational attainment, gender, race, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points, and results among rural adults in Iowa, North Carolina, and Texas have a margin of error of plus or minus 7 percentage points.

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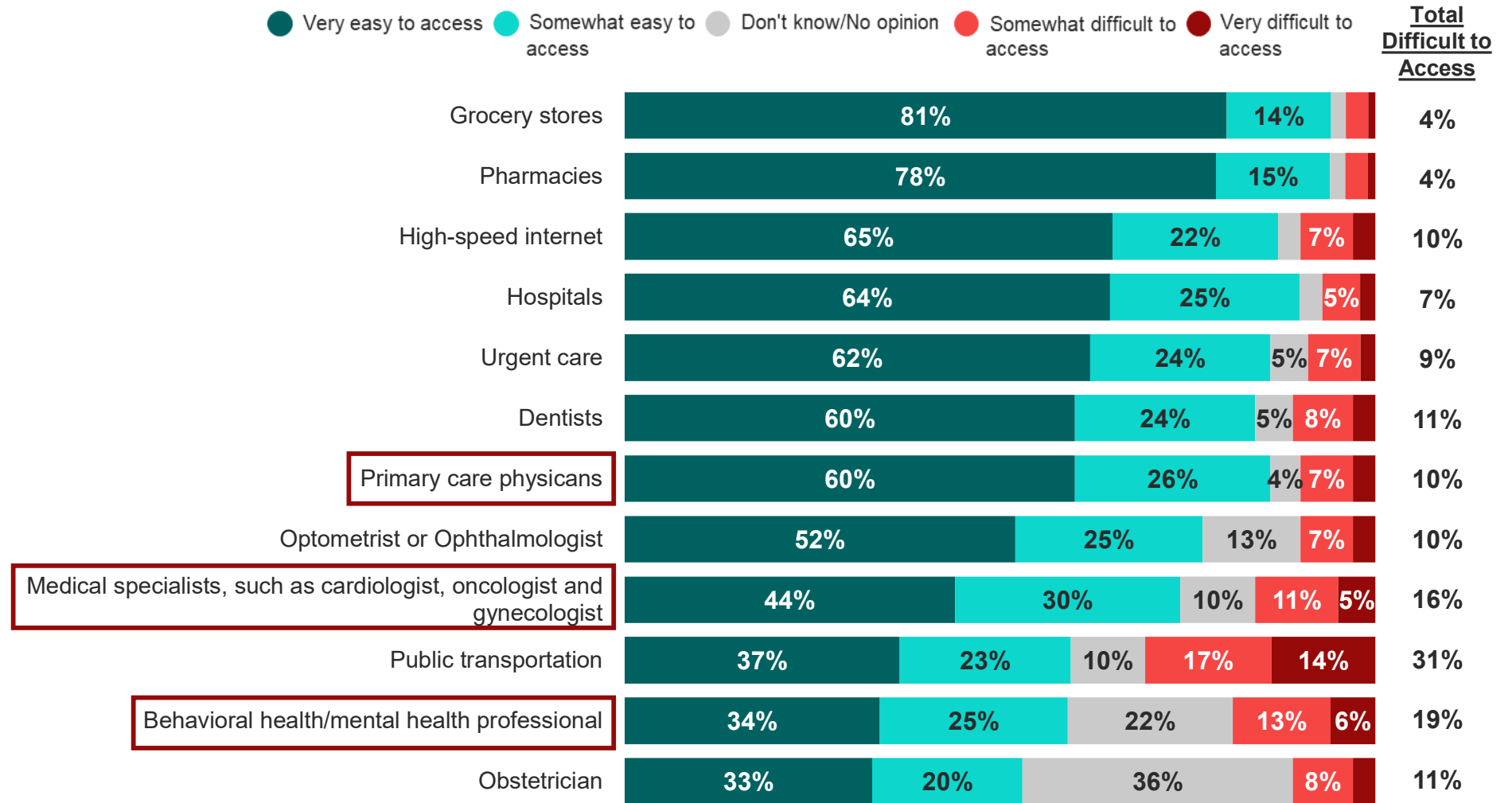


Importance of Expanding Health Care in Rural Communities

At least 10% of voters say it is difficult to access primary care physicians (10%), medical specialists (16%), and a behavioral or mental health professional (19%) in their local community.

Thinking about your local community, how easy or difficult is it for you to access the following?

U.S. VOTERS



Current Access to Health Care

Rural voters are more likely than non-rural voters to say it is difficult to access medical specialists in their local community (26% vs. 12%), and 6% more likely to say it is difficult to access a hospital in their local community (11% vs 5%).

Thinking about your local community, how easy or difficult is it for you to access the following?

Difficult to Access Health Care Providers in Local Community Across Community Type

| | Voters | Non-Rural^{*a} | Rural^b |
|--|---------------|-------------------------------|--------------------------|
| Pharmacies | 4% | 3% | 6% |
| Hospitals | 5% | 5% | 11% ^a |
| Urgent Care | 9% | 6% | 7% |
| Primary care physicians | 10% | 8% | 14% ^a |
| Optometrist or Ophthalmologist | 10% | 7% | 17% ^a |
| Medical specialists, such as cardiologist, oncologist and gynecologist | 16% | 12% | 26% ^a |
| Behavioral health/mental health professional | 19% | 16% | 27% ^a |
| Obstetrician | 11% | 9% | 17% ^a |

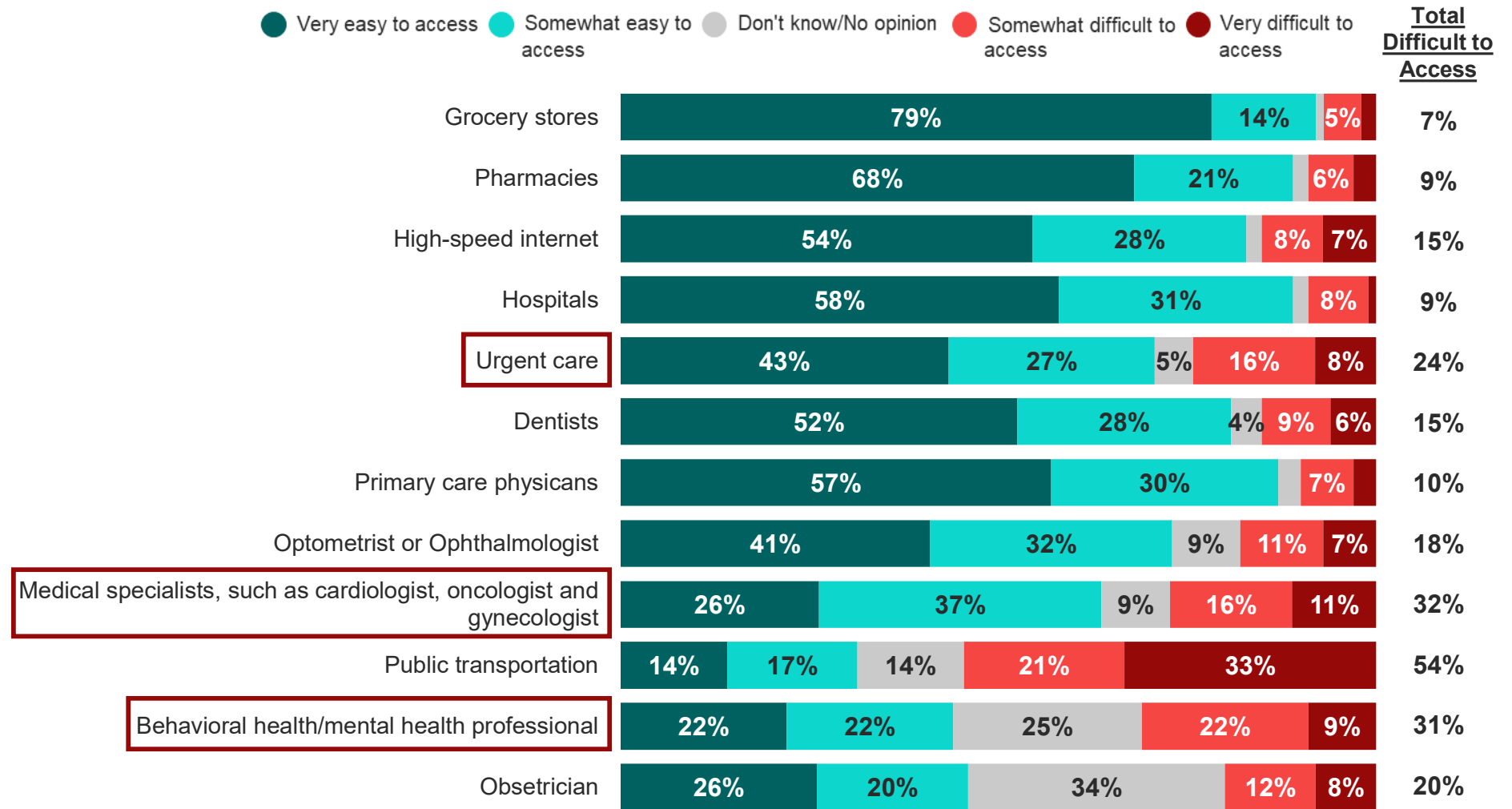
**Non-Rural combines results from urban and suburban voters, letters indicate statistical significant differences*

**Current
Access to
Health Care**

When thinking about their local community, at least 1 in 4 rural adults in Iowa say it is difficult to access urgent care (24%), medical specialists (32%), and behavioral health/mental health professionals (31%).

Thinking about your local community, how easy or difficult is it for you to access the following?

RURAL ADULTS IN IOWA



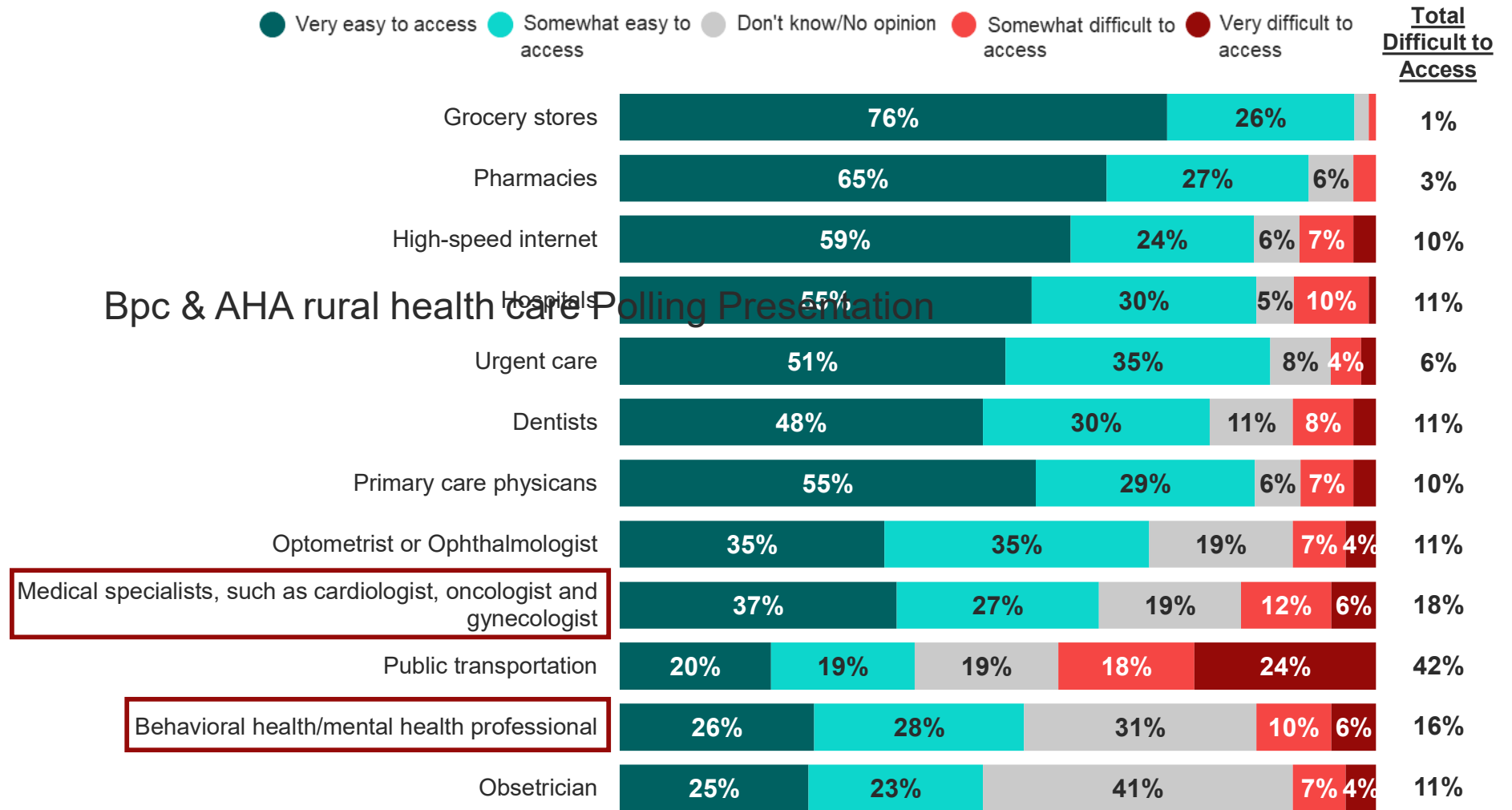
Current Access to Health Care in Iowa

Current Access to Health Care in North Carolina

Similarly, about 1 in 7 rural adults in North Carolina say it is difficult to access medical specialists (18%) and behavioral health/mental health professionals (16%) in their local community.

Thinking about your local community, how easy or difficult is it for you to access the following?

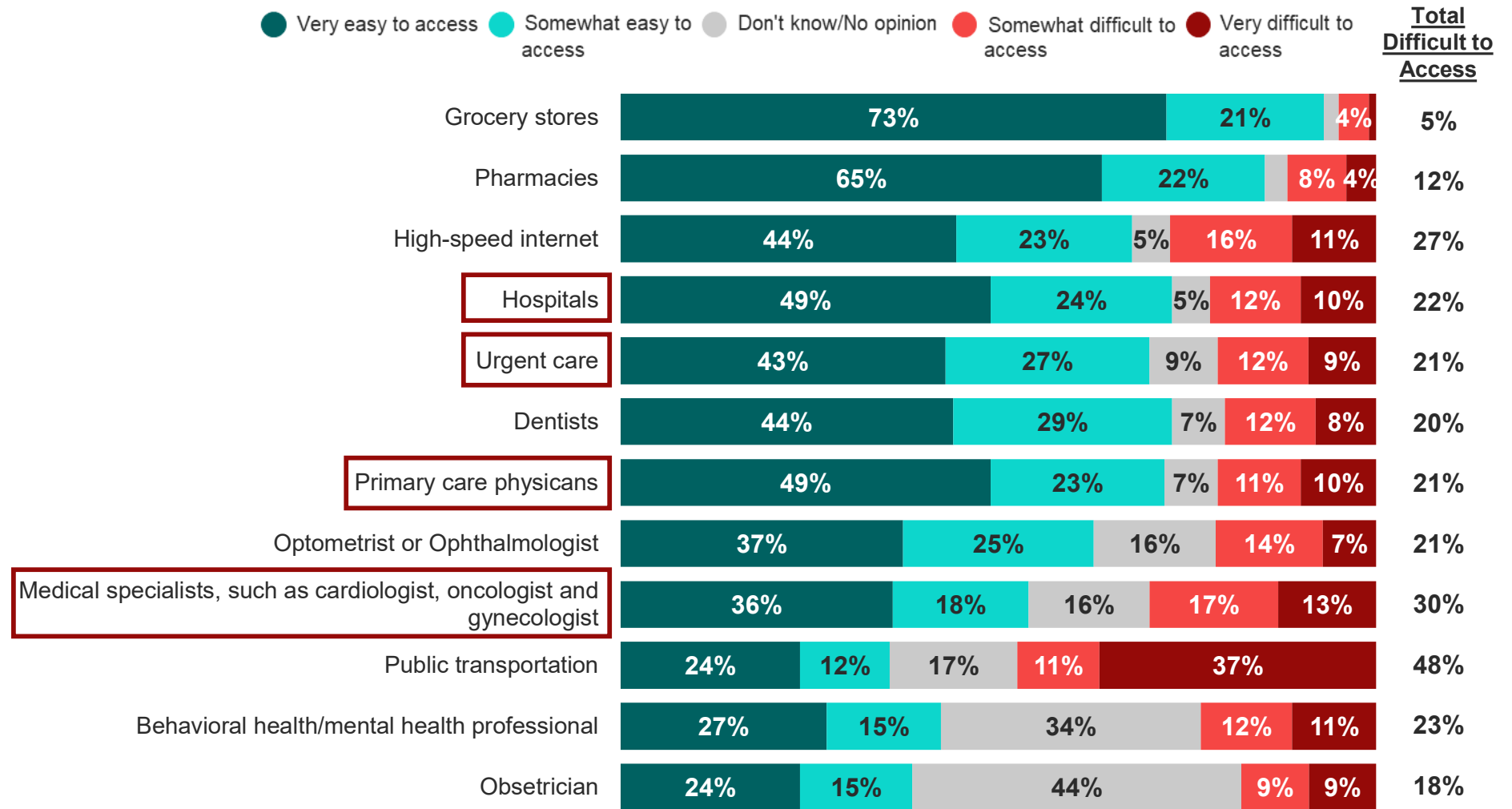
RURAL ADULTS IN NORTH CAROLINA



At least one in five rural adults in Texas say it is difficult to access hospitals (22%), urgent care (21%), primary care physicians (21%), and medical specialists (30%) in their local community.

Thinking about your local community, how easy or difficult is it for you to access the following?

RURAL ADULTS IN TEXAS



Current Access to Health Care in Texas

Rural adults in Texas are more likely than rural adults in Iowa and North Carolina to say it is difficult to access hospitals, urgent cares, and primary care physicians in their local community.

Thinking about your local community, how easy or difficult is it to for you to access the following?

Difficult to Access Health Care Providers in Local Community Across Rural State Oversamples

| | <i>Iowa</i> ^a | <i>North Carolina</i> ^b | <i>Texas</i> ^c |
|--|--------------------------|------------------------------------|---------------------------|
| Pharmacies | 9% ^b | 3% | 12% ^b |
| Hospitals | 9% | 11% | 22% ^{ab} |
| Urgent Care | 9% | 6% | 21% ^{ab} |
| Primary care physicians | 10% | 10% | 21% ^{ab} |
| Optometrist or Ophthalmologist | 18% | 10% | 21% ^b |
| Medical specialists, such as cardiologist, oncologist and gynecologist | 32% | 18% | 30% ^b |
| Behavioral health/mental health professional | 31% ^b | 16% | 23% |
| Obstetrician | 20% ^b | 11% | 18% |

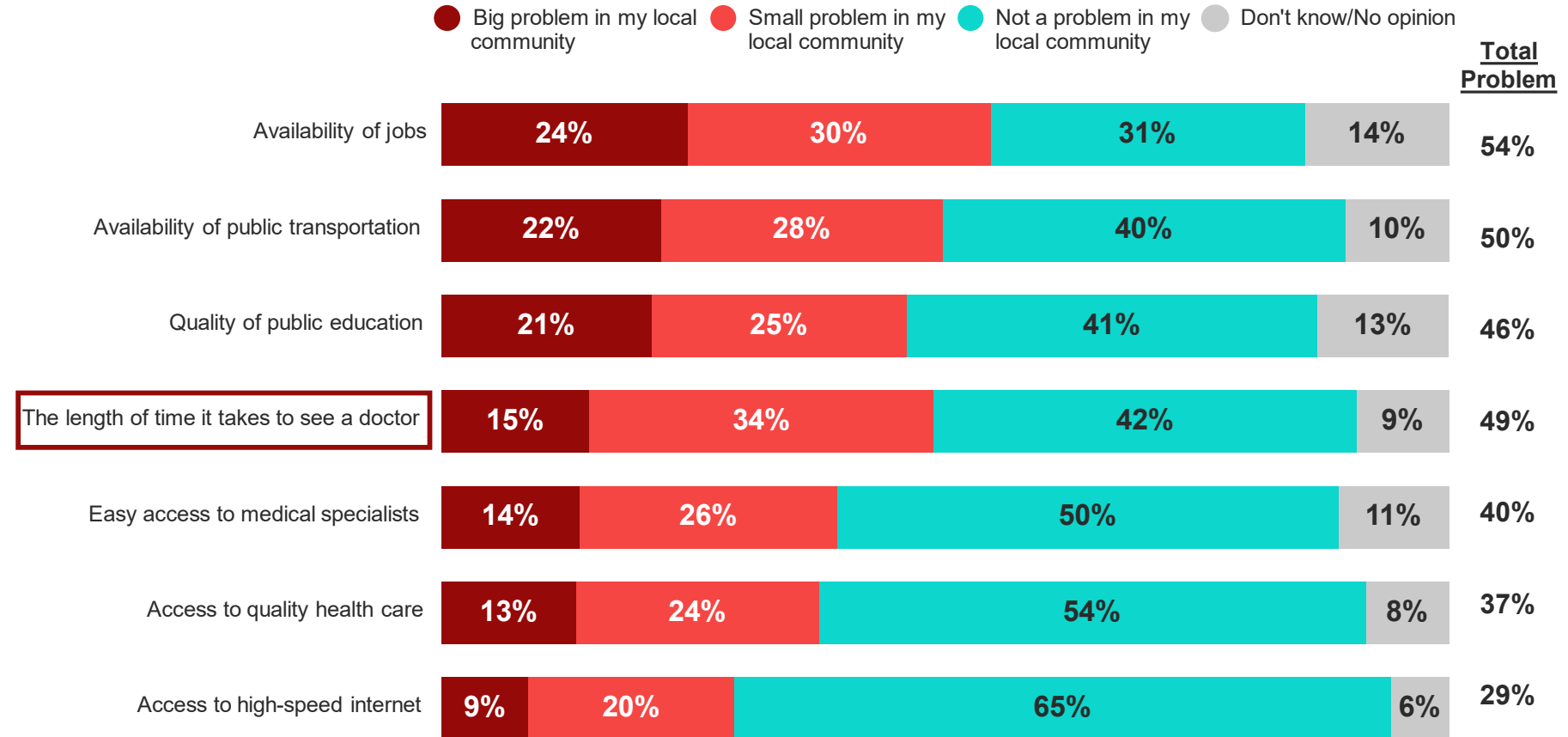
*Letters indicate statistical significant differences

Current
Access to
Health Care

Half of voters (49%) say the length of time it takes to see a doctor is a problem in their local community.

How much of a problem, if at all, is each of the following in your local community?

U.S. VOTERS



Current Access to Health Care

Rural adults are more likely than non-rural adults to say the length of time it takes to see a doctor, easy access to quality health care, and access to quality health care are a problem in their local community.

How much of a problem, if at all, is each of the following in your local community?

U.S. VOTERS

Total Problem in Local Community Across Community Type

| | Voters | Non-Rural^{*a} | Rural^b |
|--|---------------|-------------------------------|--------------------------|
| Availability of jobs | 54% | 51% | 64% ^a |
| Availability of public transportation | 50% | 45% | 63% ^a |
| Quality of public education | 46% | 47% | 46% |
| The length of time it takes to see a doctor | 49% | 48% | 53% ^a |
| Easy access to medical specialists | 40% | 33% | 54% ^a |
| Access to quality health care | 37% | 34% | 47% ^a |
| Access to high-speed internet | 29% | 25% | 41% ^a |

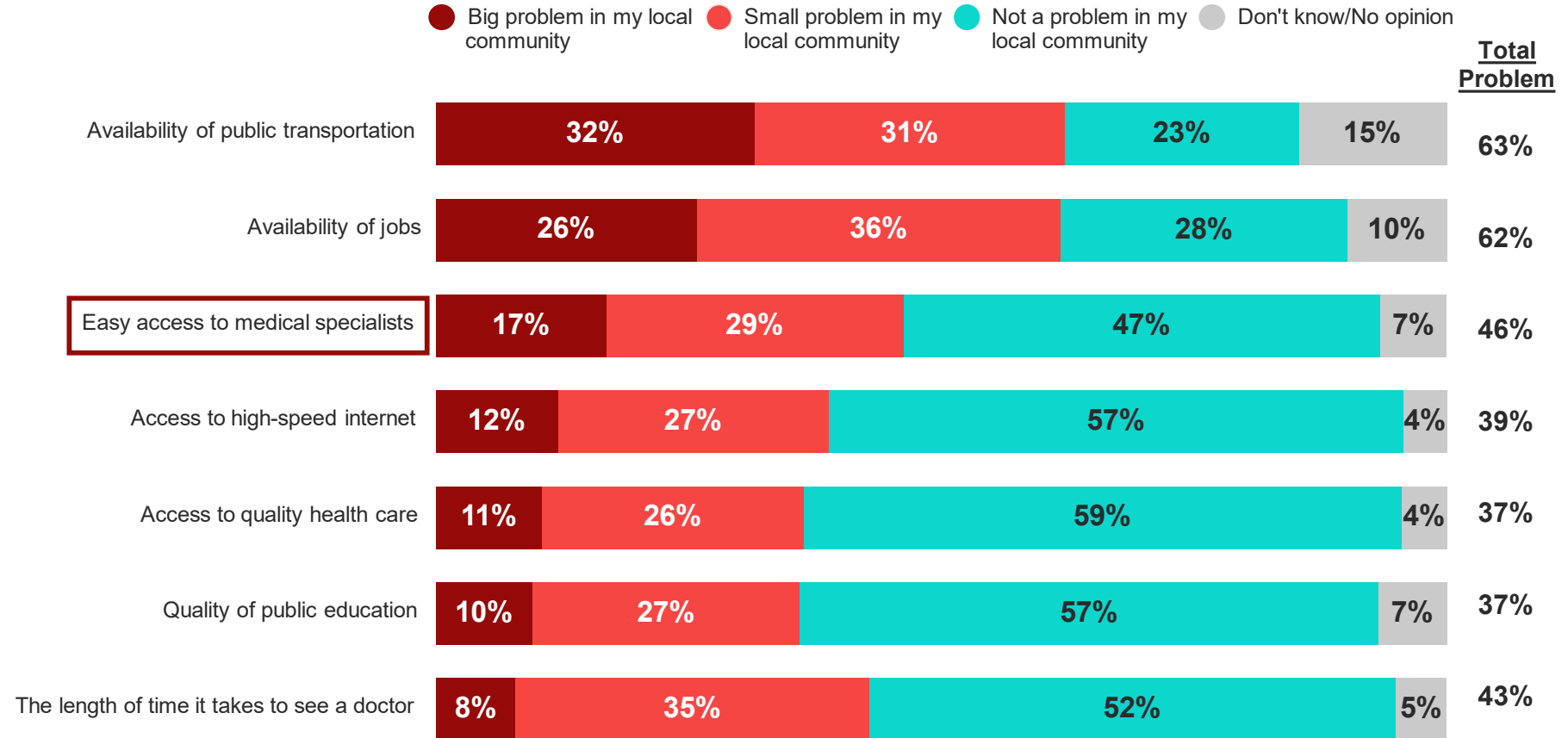
**Non-Rural combines results from urban and suburban voters, letters indicate statistical significant differences*

**Current
Access to
Health Care**

Nearly half of rural adults in Iowa (46%) say easy access to medical specialists is a problem in their local community.

How much of a problem, if at all, is each of the following in your local community?

RURAL ADULTS IN IOWA

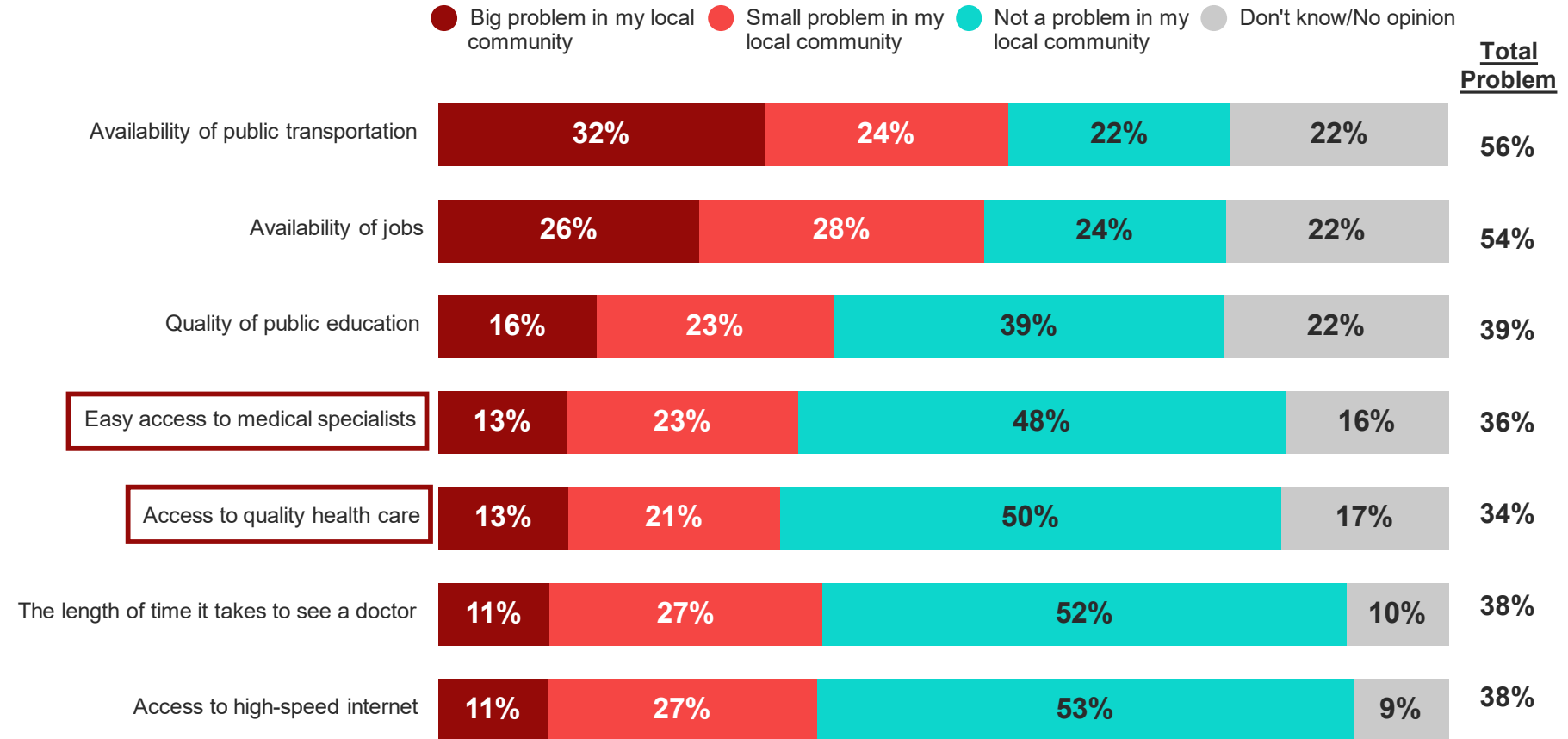


Current Access to Health Care in Iowa

Similarly, about one in three rural adults in North Carolina say easy access to medical specialists (36%) and access to quality health care (34%) are a problem in their local community.

How much of a problem, if at all, is each of the following in your local community?

RURAL ADULTS IN NORTH CAROLINA

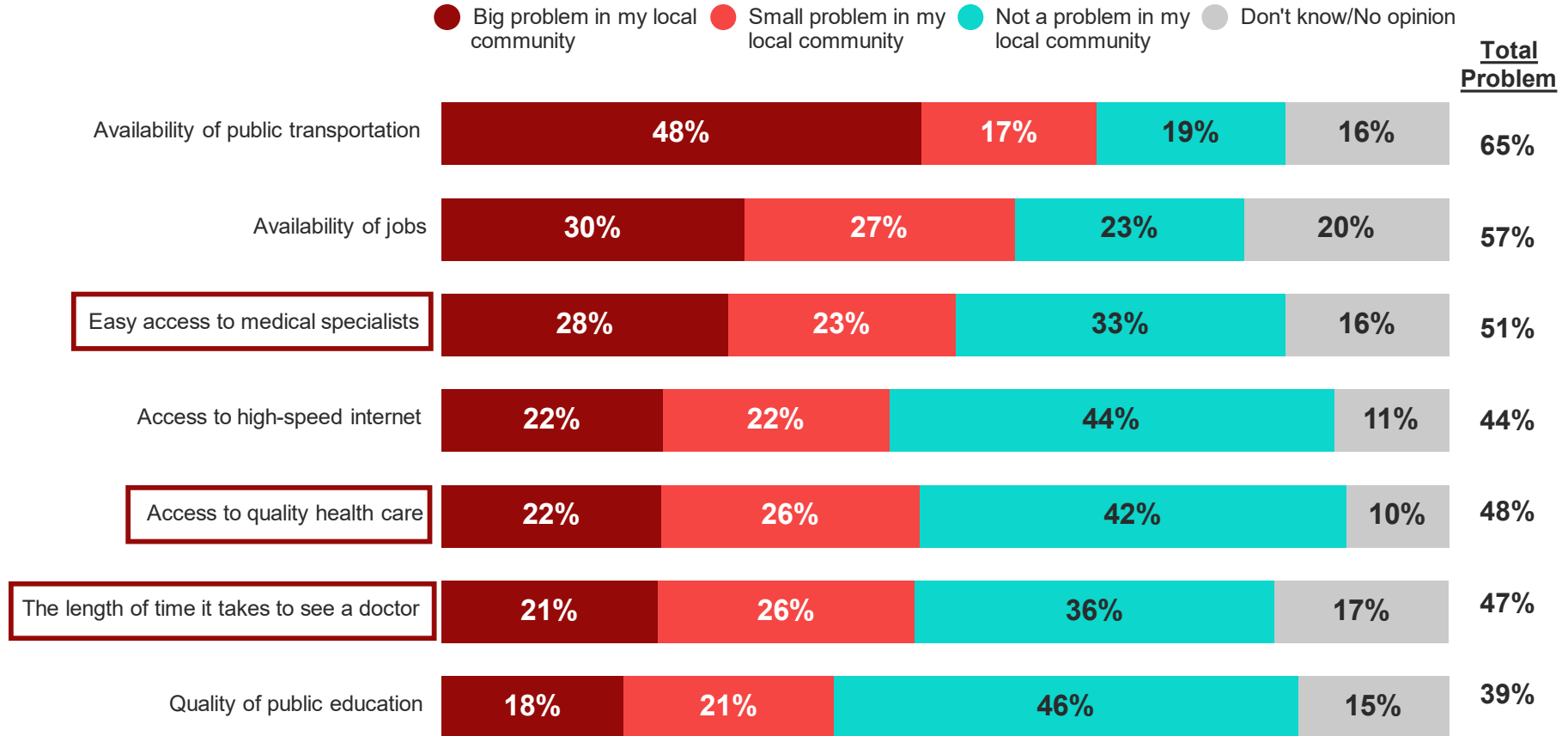


Current Access to Health Care in North Carolina

And, half of rural adults in Texas say easy access to medical specialists (51%), access to quality health care (48%), and the length of time it takes to see a doctor (47%) are problems in their local community.

How much of a problem, if at all, is each of the following in your local community?

RURAL ADULTS IN TEXAS



Current Access to Health Care in Texas

Rural adults in Texas are more likely than rural adults in Iowa and North Carolina to say access to quality health care is a problem in their local community.

How much of a problem, if at all, is each of the following in your local community?

Total Problem in Local Community Across Rural State Oversamples

| | <i>Iowa</i> ^a | <i>North Carolina</i> ^b | <i>Texas</i> ^c |
|---|--------------------------|------------------------------------|---------------------------|
| Availability of jobs | 62% | 54% | 57% |
| Availability of public transportation | 63% | 56% | 65% |
| Quality of public education | 37% | 39% | 39% |
| The length of time it takes to see a doctor | 43% | 38% | 47% |
| Easy access to medical specialists | 46% | 36% | 51% ^b |
| Access to quality health care | 37% | 34% | 48% ^{ab} |
| Access to high-speed internet | 39% | 38% | 44% |

*Letters indicate statistical significant differences

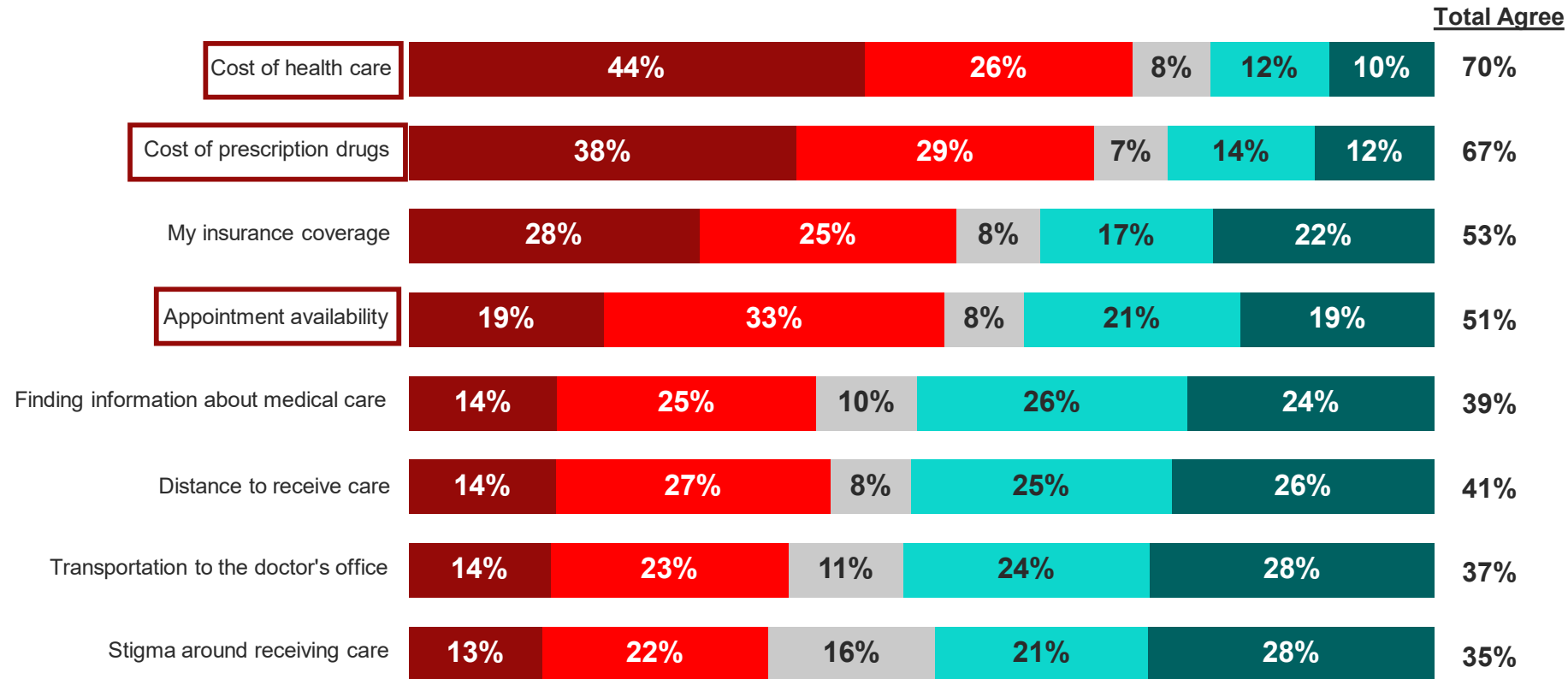
**Current
Access to
Health Care**

Based on their personal experiences, a majority of voters agree the cost of health care (70%), cost of prescription drugs (67%), and appointment availability (51%) are barriers to accessing medical services or treatment. And, half of voters agree appointment availability are barriers to accessing medical services or treatment.

Thinking about your personal experiences, do you agree or disagree that the following are barriers to accessing medical services or treatment?

U.S. VOTERS

● Strongly agree ● Somewhat agree ● Don't know/No opinion ● Somewhat disagree ● Strongly disagree



Current Access to Health Care

Rural voters are more likely than non-rural voters to agree that appointment availability and distance to receive care are barriers to receiving medical services or treatment.

Thinking about your personal experiences, do you agree or disagree that the following are barriers to accessing medical services or treatment?

U.S. VOTERS

Barriers to Accessing Medical Services or Treatment Across Community Type

| | Voters | Non-Rural^{*a} | Rural^b |
|---|---------------|-------------------------------|--------------------------|
| Cost of health care | 70% | 71% | 71% |
| Cost of prescription drugs | 67% | 66% | 70% |
| My insurance coverage | 53% | 54% | 52% |
| Appointment availability | 51% | 50% | 56% ^a |
| Finding information about medical care | 39% | 40% | 40% |
| Distance to receive care | 41% | 37% | 50% ^a |
| Transportation to the doctor's office | 37% | 36% | 39% |
| Stigma around receiving care | 35% | 34% | 36% |

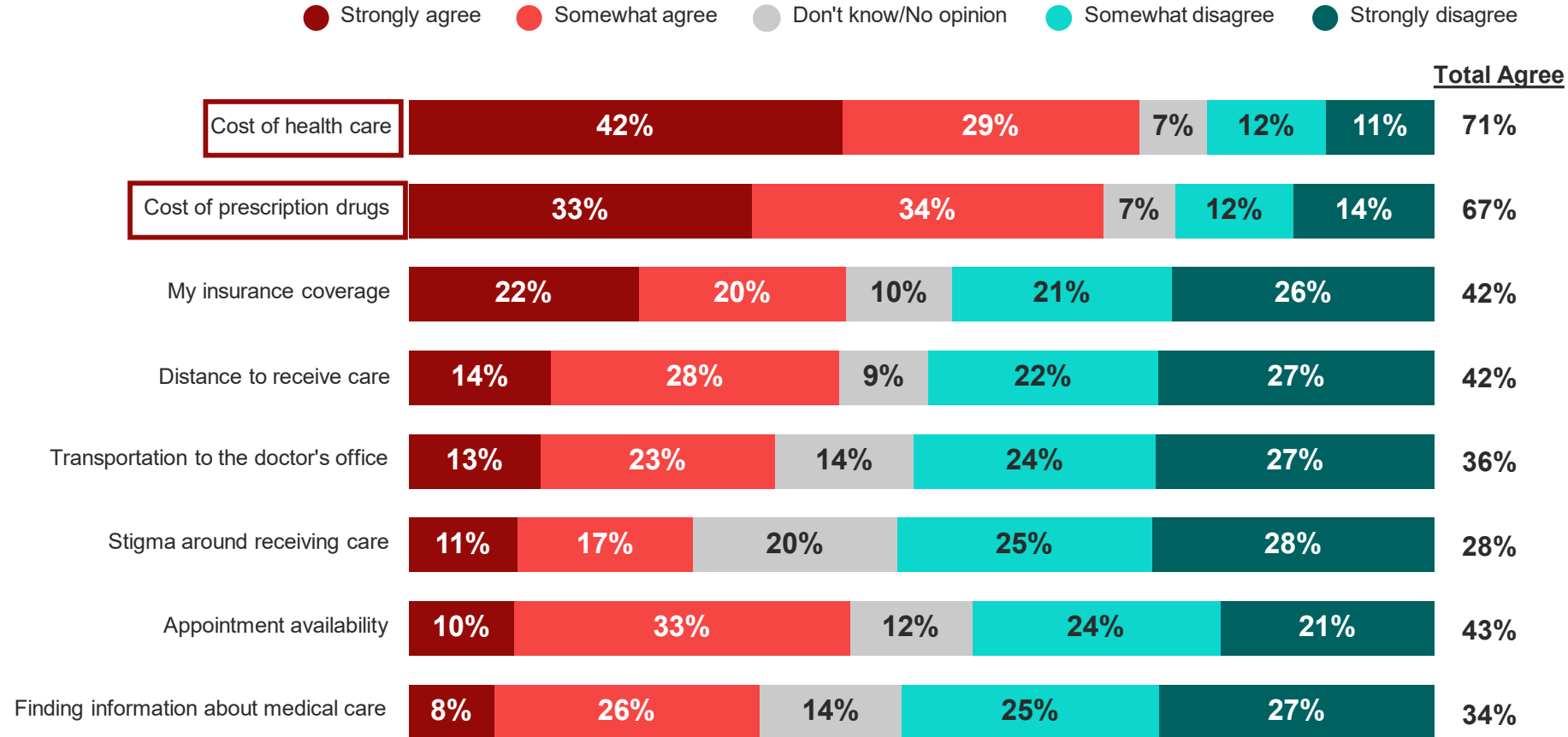
**Non-Rural combines results from urban and suburban voters, letters indicate statistical significant differences*

**Current
Access to
Health Care**

A majority of rural adults in Iowa agree the cost of health care (71%) and cost of prescription drugs (67%) are barriers to accessing medical services or treatment.

Thinking about your personal experiences, do you agree or disagree that the following are barriers to accessing medical services or treatment?

RURAL ADULTS IN IOWA

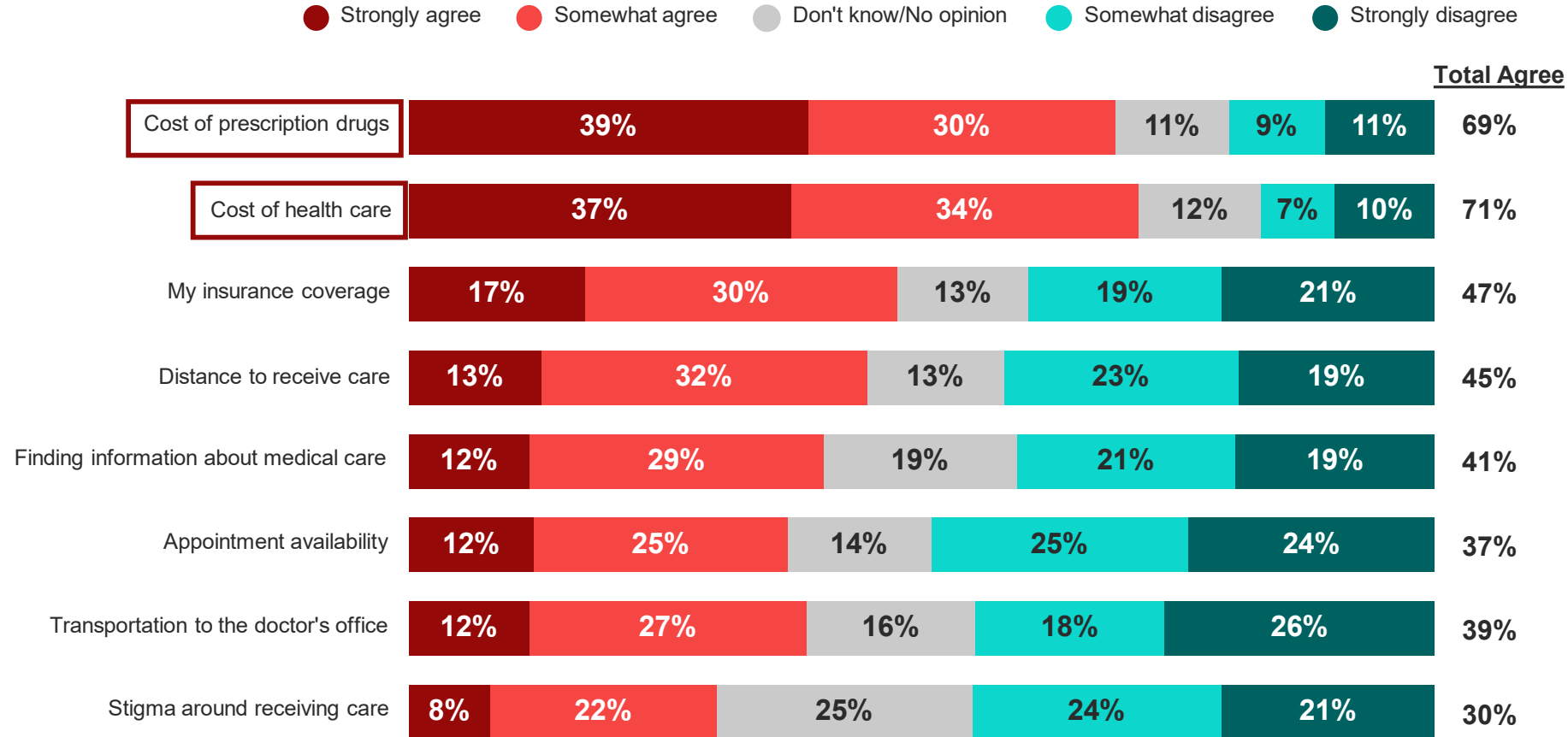


Current Access to Health Care in Iowa

Similarly, a majority of rural adults in North Carolina agree the cost of prescription drugs (69%) and cost of health care (71%) are barriers to accessing medical services or treatment

Thinking about your personal experiences, do you agree or disagree that the following are barriers to accessing medical services or treatment?

RURAL ADULTS IN NORTH CAROLINA



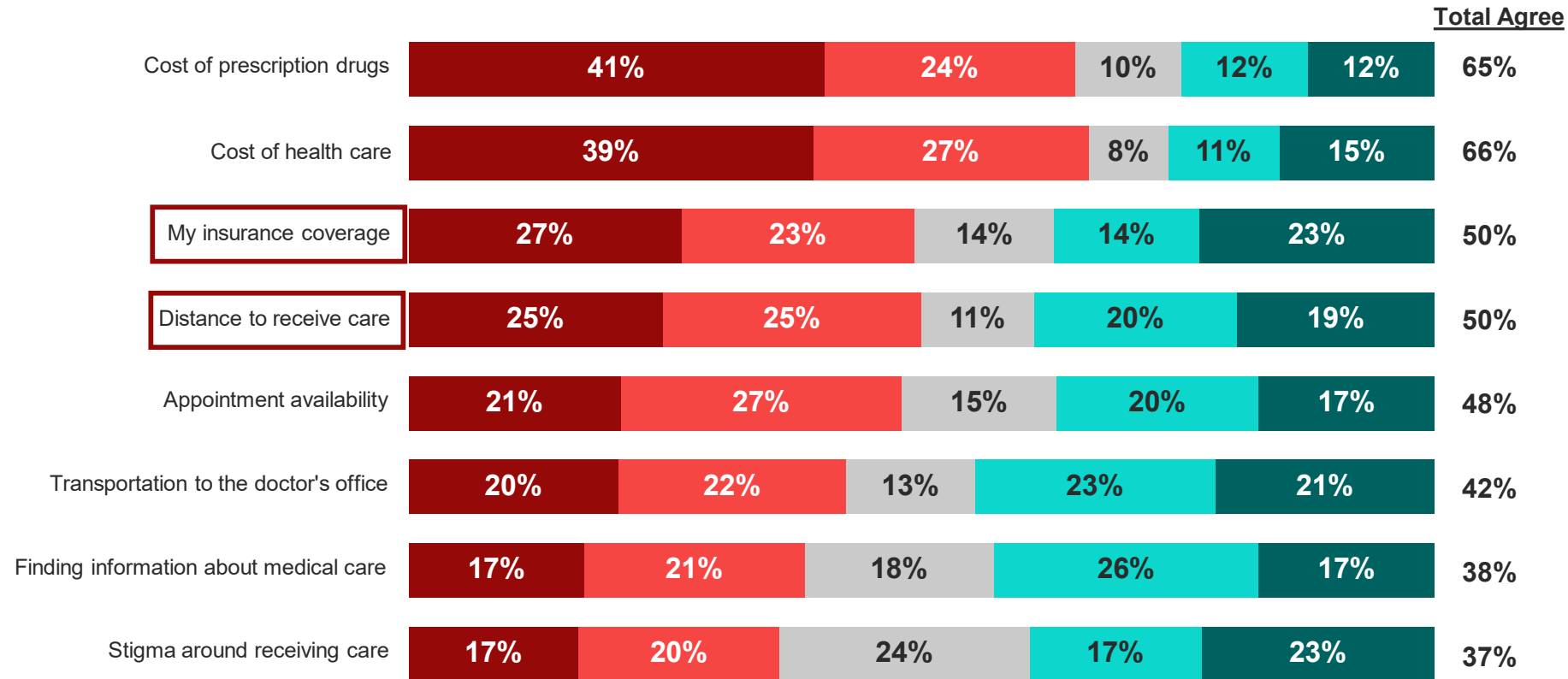
Current Access to Health Care in North Carolina

Half of rural adults in Texas agree their insurance coverage and the distance to receive care are barriers to accessing medical services or treatment.

Thinking about your personal experiences, do you agree or disagree that the following are barriers to accessing medical services or treatment?

RURAL ADULTS IN TEXAS

● Strongly agree ● Somewhat agree ● Don't know/No opinion ● Somewhat disagree ● Strongly disagree



Current Access to Health Care in Texas

Rural adults in Texas are more likely than rural adults in North Carolina to agree that appointment availability is a barrier to accessing medical services or treatment.

Thinking about your personal experiences, do you agree or disagree that the following are barriers to accessing medical services or treatment?

Current Access to Health Care

| Barriers to Accessing Medical Services or Treatment Across Rural State Oversamples | | | |
|---|--------------------------|------------------------------------|---------------------------|
| | <i>Iowa</i> ^a | <i>North Carolina</i> ^b | <i>Texas</i> ^c |
| Cost of health care | 71% | 71% | 66% |
| Cost of prescription drugs | 67% | 69% | 65% |
| My insurance coverage | 42% | 47% | 50% |
| Appointment availability | 43% | 37% | 48% ^b |
| Finding information about medical care | 34% | 41% | 38% |
| Distance to receive care | 42% | 45% | 50% |
| Transportation to the doctor's office | 36% | 39% | 42% |
| Stigma around receiving care | 28% | 30% | 37% |

*Letters indicate statistical significant differences

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Current Access to Health Care



Likelihood to use Telemedicine Technologies



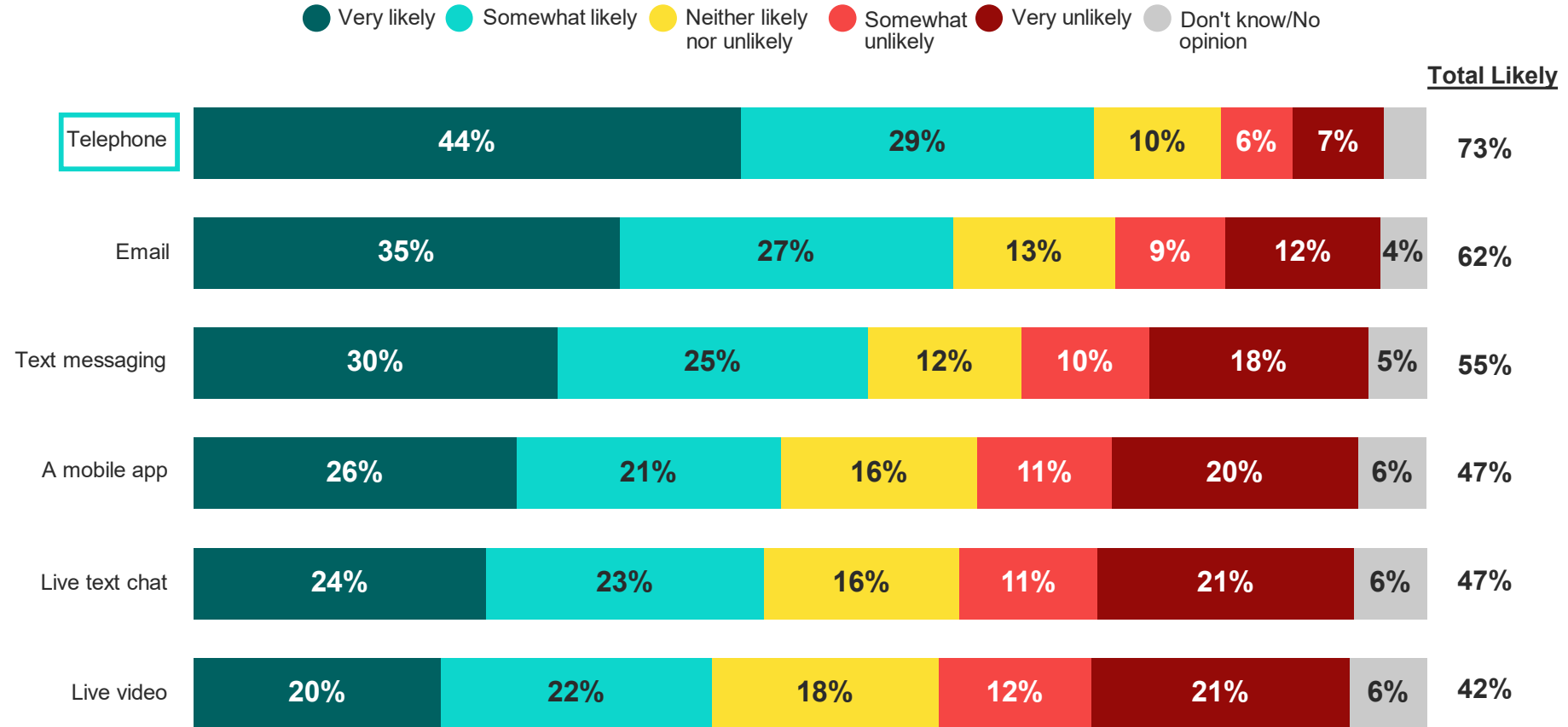
Importance of Expanding Health Care in Rural Communities

Likelihood to use Telemedicine Technologies

After learning about telemedicine, three in four voters are likely to use the telephone (73%) to reach their doctor or to receive medical care remotely.

As you may know, telemedicine is the use of telecommunications to provide health care from a distance, including video chatting with doctors or medical specialists, and the remote monitoring of your blood pressure, weight or blood sugar. If available, how likely are you to use the following technologies to reach your doctor or to receive medical care?

U.S. VOTERS



And, a majority of non-rural and rural voters would be likely to use the telephone, email, and text messaging to reach their doctor to receive medical care remotely.

As you may know, telemedicine is the use of telecommunications to provide health care from a distance, including video chatting with doctors or medical specialists, and the remote monitoring of your blood pressure, weight or blood sugar. If available, how likely are you to use the following technologies to reach your doctor or to receive medical care?

U.S. VOTERS

Likely to Use to Reach Doctor or Receive Medical Care Across Community Type

| | Voters | Non-Rural^{*a} | Rural^b |
|-----------------------|---------------|-------------------------------|--------------------------|
| Telephone | 73% | 72% | 75% |
| Email | 62% | 62% | 58% |
| Text messaging | 55% | 56% | 52% |
| A mobile app | 47% | 49% ^b | 43% |
| Live text chat | 47% | 47% | 44% |
| Live video | 42% | 44% ^b | 38% |

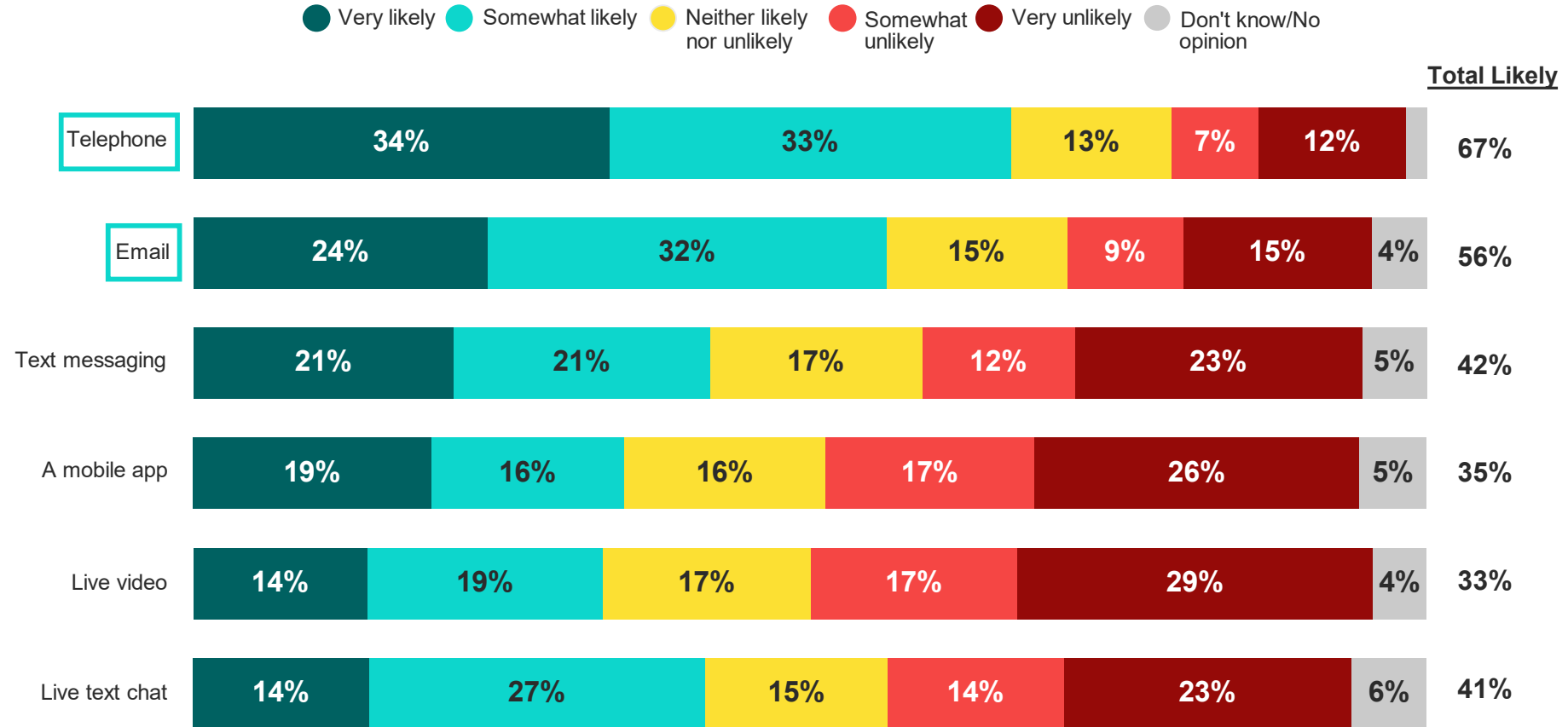
**Non-Rural combines results from urban and suburban voters, letters indicate statistical significant differences*

**Likelihood to
use
Telemedicine
Technologies**

A majority of rural adults in Iowa would be likely to use the telephone (67%) and email (56%) to reach their doctor or to receive medical care remotely.

As you may know, telemedicine is the use of telecommunications to provide health care from a distance, including video chatting with doctors or medical specialists, and the remote monitoring of your blood pressure, weight or blood sugar. If available, how likely are you to use the following technologies to reach your doctor or to receive medical care?

RURAL ADULTS IN IOWA

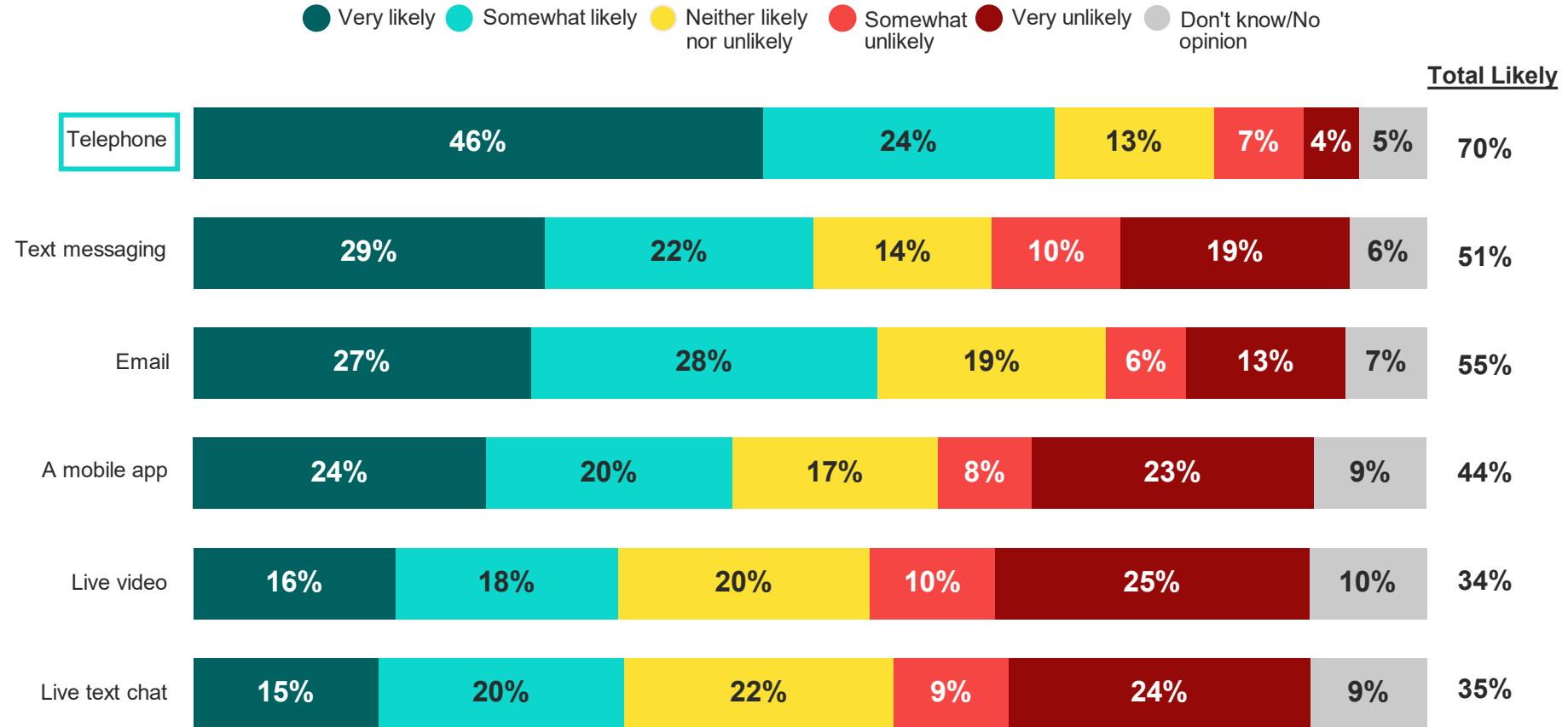


Likelihood to use Telemedicine Technologies in Iowa

Nearly half of rural adults in North Carolina (46%) would be *very likely* to use the telephone to reach their doctor or to receive medical care remotely.

As you may know, telemedicine is the use of telecommunications to provide health care from a distance, including video chatting with doctors or medical specialists, and the remote monitoring of your blood pressure, weight or blood sugar. If available, how likely are you to use the following technologies to reach your doctor or to receive medical care?

RURAL ADULTS IN NORTH CAROLINA

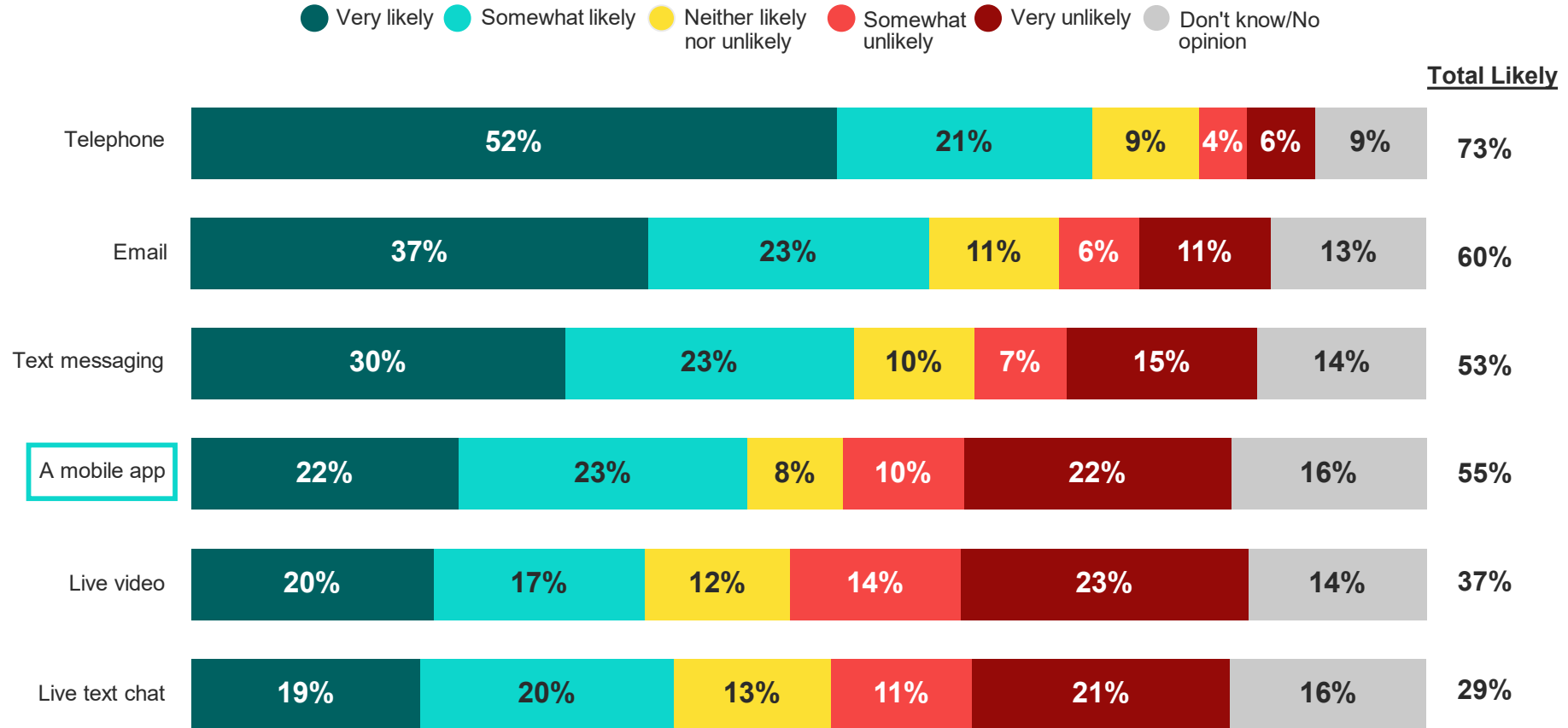


Likelihood to use Telemedicine Technologies in North Carolina

Half of rural adults in Texas (55%) are likely to use a mobile app to reach their doctor or to receive medical care remotely.

As you may know, telemedicine is the use of telecommunications to provide health care from a distance, including video chatting with doctors or medical specialists, and the remote monitoring of your blood pressure, weight or blood sugar. If available, how likely are you to use the following technologies to reach your doctor or to receive medical care?

RURAL ADULTS IN TEXAS



Likelihood to use Telemedicine Technologies in Texas

Likelihood to use Telemedicine Technologies

Rural adults in Texas are more likely than rural adults in Iowa and North Carolina to be likely to use a mobile app to reach their doctor or receive care remotely.

As you may know, telemedicine is the use of telecommunications to provide health care from a distance, including video chatting with doctors or medical specialists, and the remote monitoring of your blood pressure, weight or blood sugar. If available, how likely are you to use the following technologies to reach your doctor or to receive medical care?

| Likely to Use to Reach Doctor or Receive Medical Care Across Rural State Oversamples | | | |
|---|--------------------------|------------------------------------|---------------------------|
| | <i>Iowa</i> ^a | <i>North Carolina</i> ^b | <i>Texas</i> ^c |
| Telephone | 67% | 70% | 73% |
| Email | 56% | 55% | 60% |
| Text messaging | 42% | 51% | 53% ^a |
| A mobile app | 35% | 44% | 55% ^{ab} |
| Live text chat | 35% | 34% | 37% |
| Live video | 41% ^c | 35% | 29% |

*Letters indicate statistical significant differences

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Likelihood to use Telemedicine Technologies

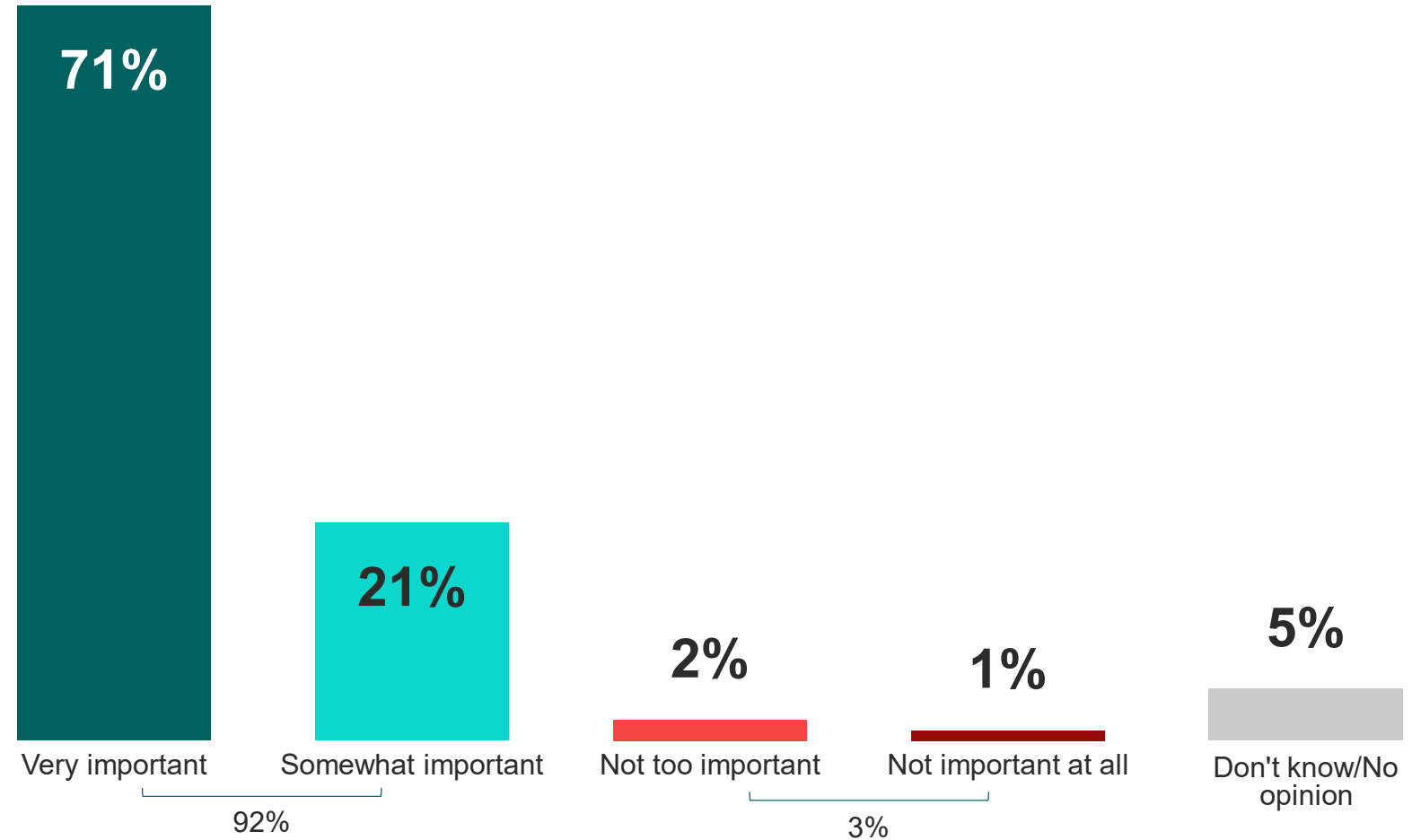


Importance of Expanding Health Care in Rural Communities

Making it easier to access health care in rural communities across the U.S. is important to a strong majority of voters (92%).

How important is it to make it easier to access health care in rural communities across the United States?

U.S. VOTERS



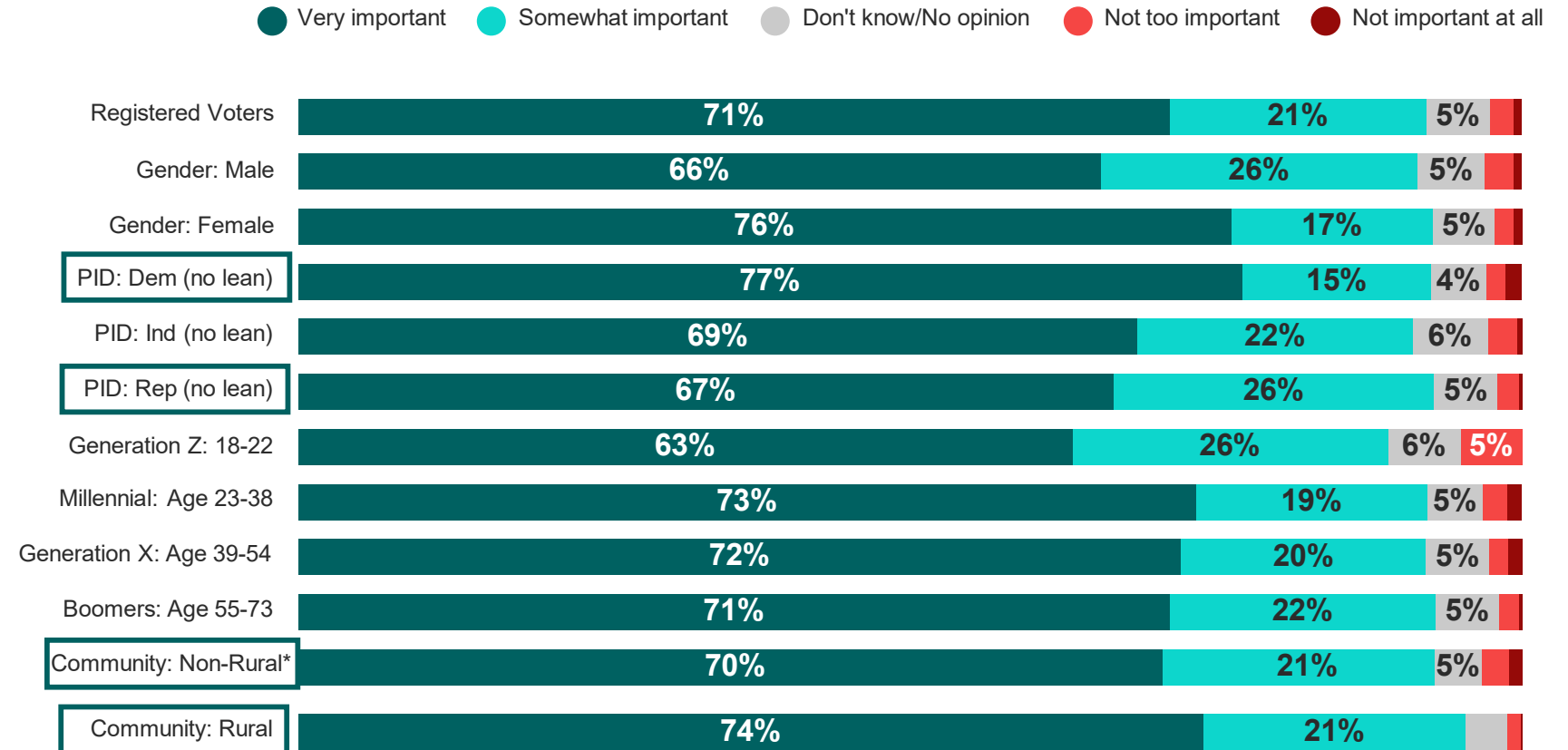
Importance of Expanding Health Care in Rural Communities

Importance of Expanding Health Care in Rural Communities

And, making it easier to access health care in rural communities is important to a strong majority of Democrats (92%), Republicans (93%), non-rural (91%), and rural (95%) voters.

How important is it to make it easier to access health care in rural communities across the United States?

U.S. VOTERS

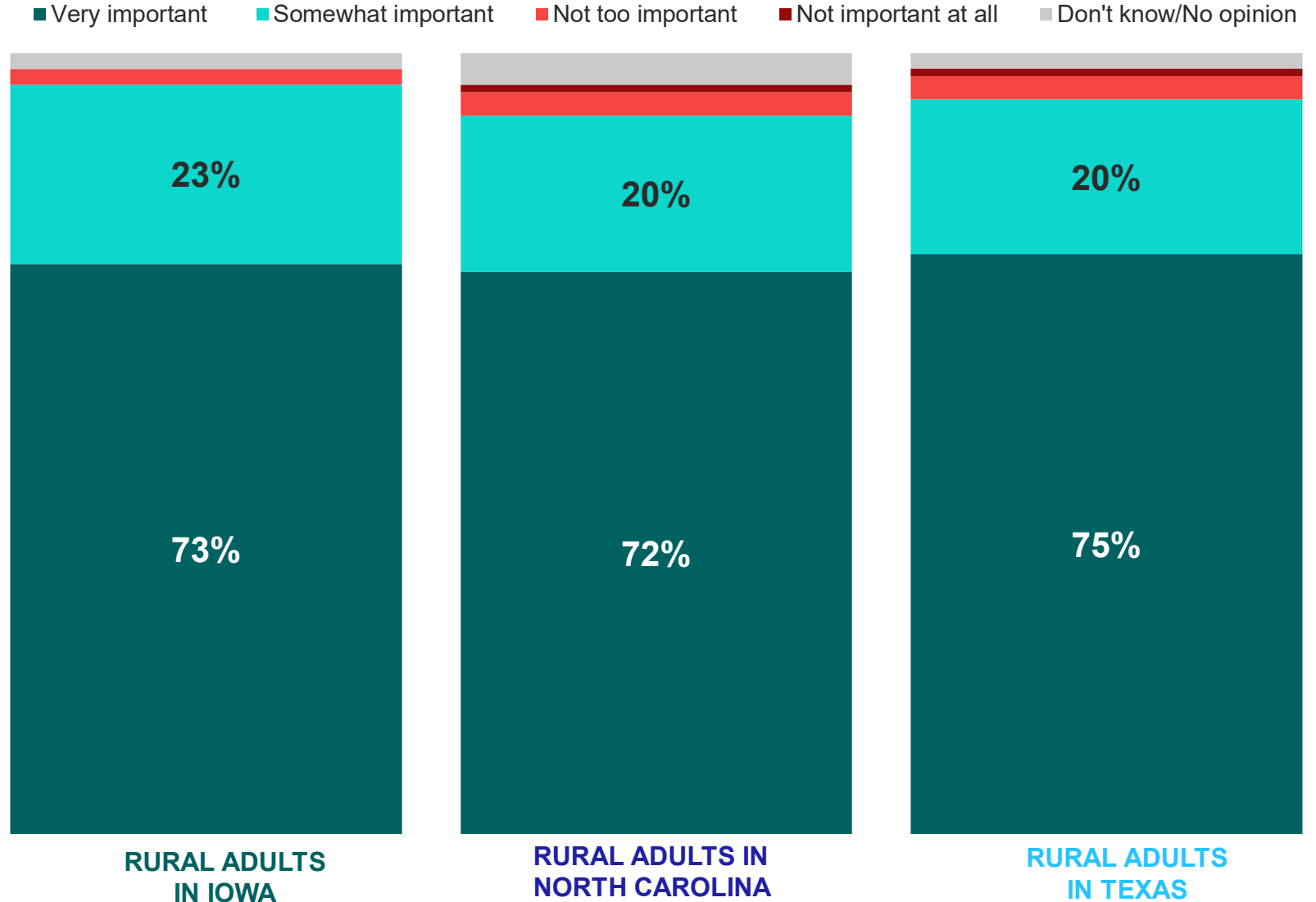


*Non-Rural combines results from urban and suburban voters

Importance of Expanding Health Care in Rural Communities

Similarly, making it easier to access health care in rural communities is *very important* to three in four rural adults in Iowa (73%), North Carolina (72%), and Texas (75%).

How important is it to make it easier to access health care in rural communities across the United States?

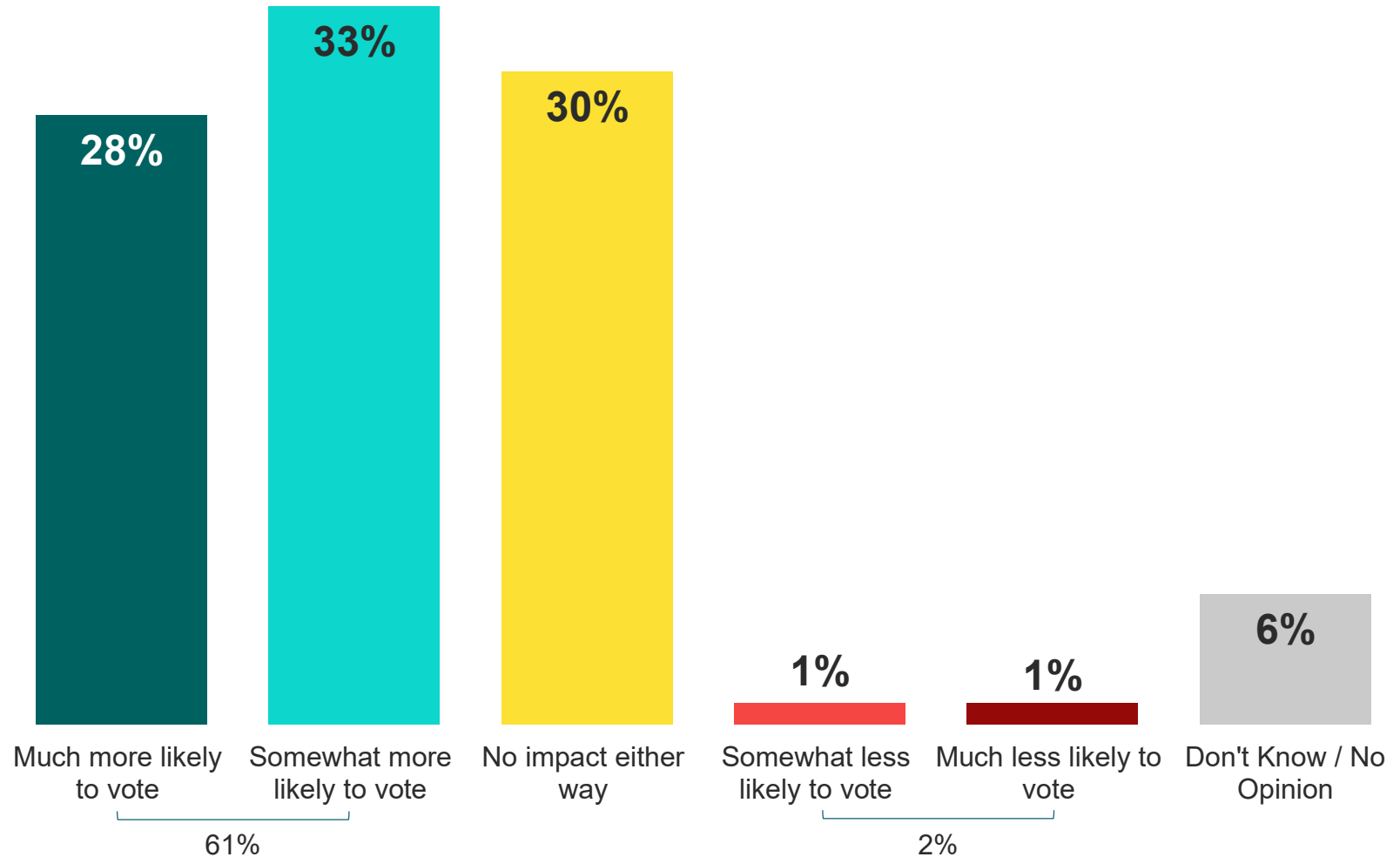


Importance of Expanding Health Care in Rural Communities

Three in five voters (61%) would be more likely to vote for a candidate in the 2020 election cycle who says he or she will address access to health care in rural America.

Would you be more or less likely to vote for a candidate in the 2020 election cycle who says he or she will address access to health care in rural America, or would it have no impact on your vote either way?

U.S. VOTERS

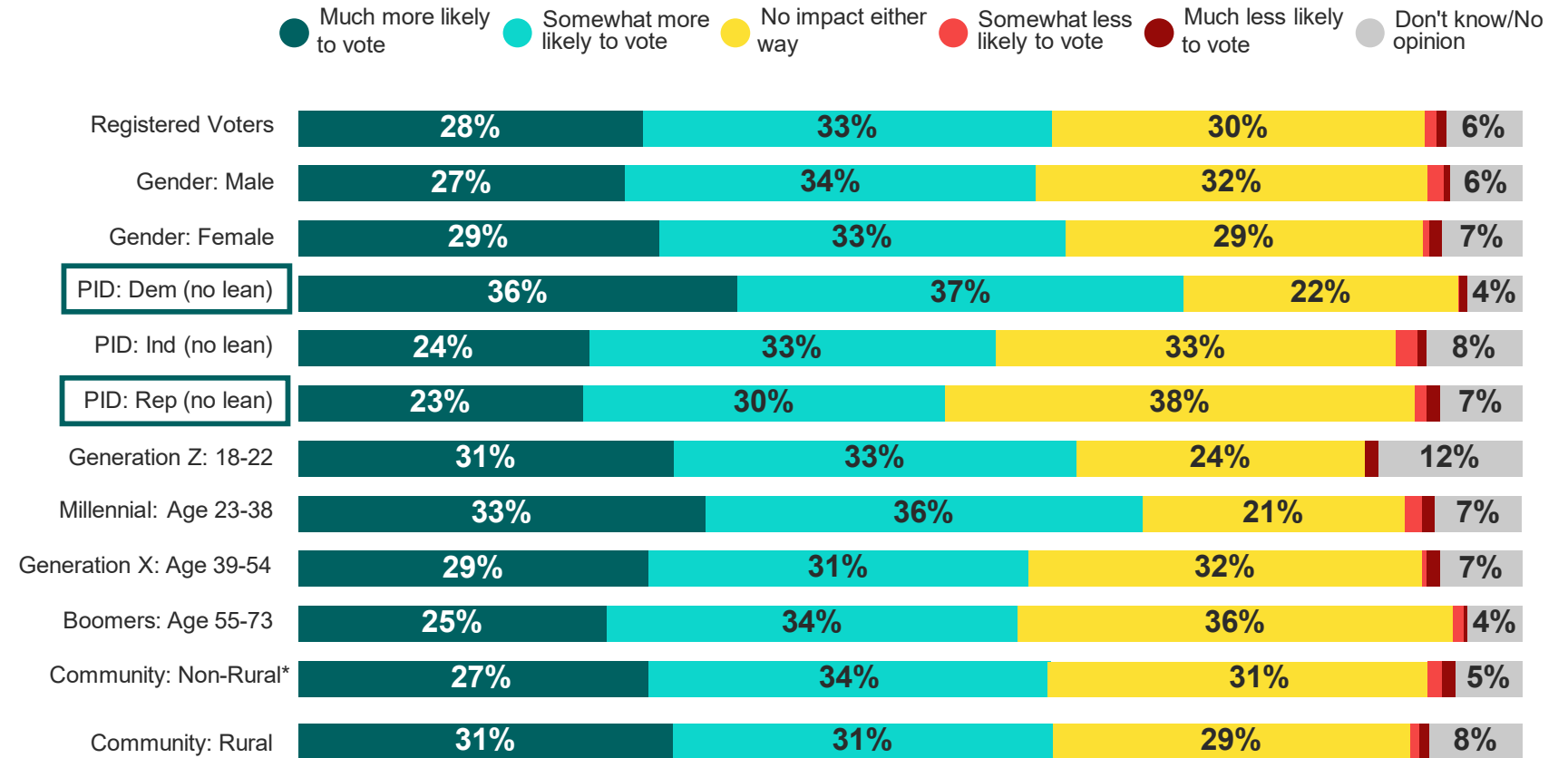


Importance of Expanding Health Care in Rural Communities

And, a majority of Democrat (73%) and Republican (53%) voters would be more likely to vote for a candidate in the 2020 election cycle who says he or she will address access to health care in rural America.

Would you be more or less likely to vote for a candidate in the 2020 election cycle who says he or she will address access to health care in rural America, or would it have no impact on your vote either way?

U.S. VOTERS

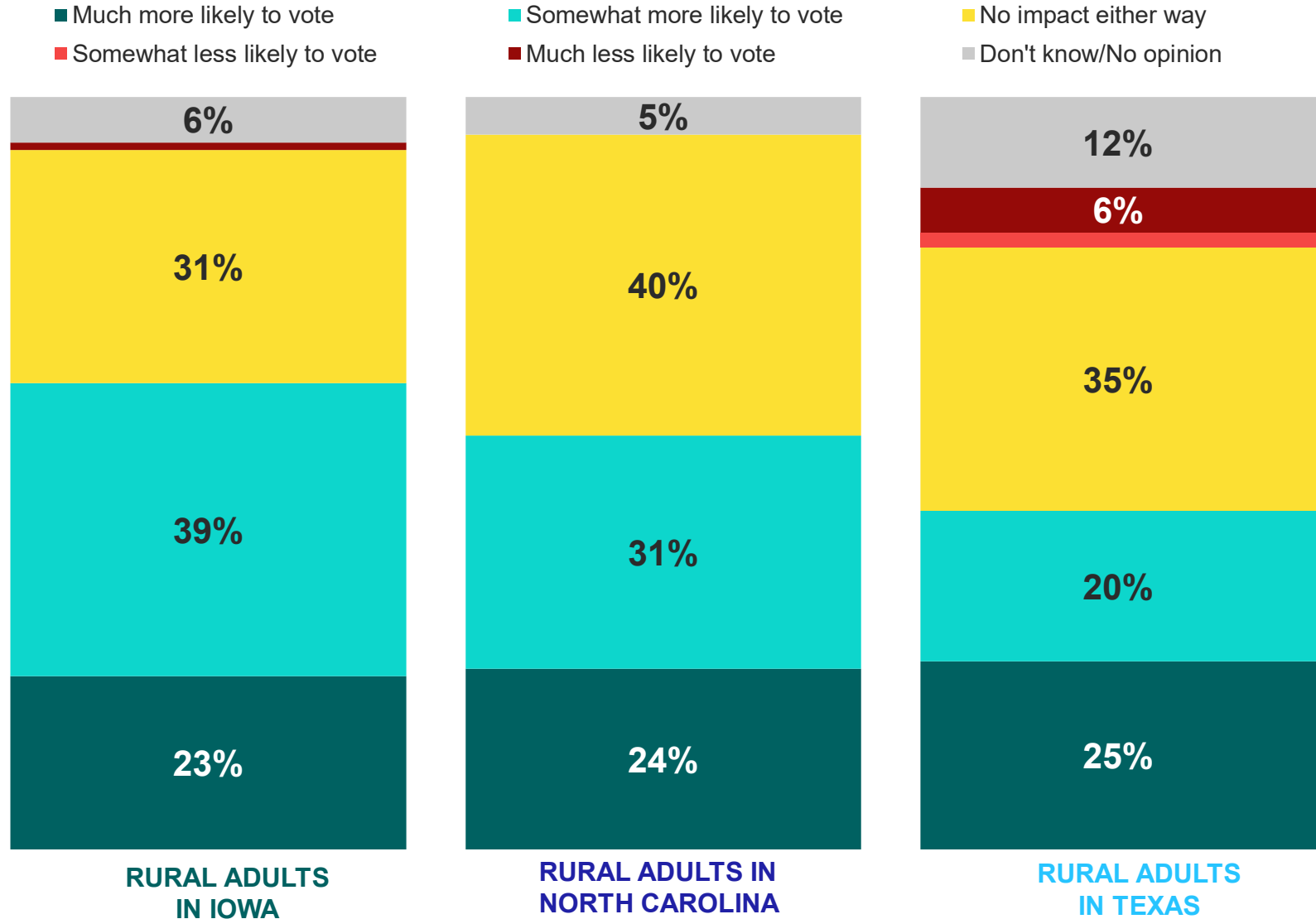


*Non-Rural combines results from urban and suburban voters

Importance of Expanding Health Care in Rural Communities

A majority of rural adults in Iowa (62%) and North Carolina (55%) would be more likely to vote for a candidate in the 2020 election cycle who says he or she will address access to health care in rural America. However, it is less likely to positively impact the vote of rural adults in Texas (45%).

Would you be more or less likely to vote for a candidate in the 2020 election cycle who says he or she will address access to health care in rural America, or would it have no impact on your vote either way?



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