

MEMORANDUM

To: Whom It May Concern
From: Margie Omero, Momentum Analysis
Neil Newhouse, Public Opinion Strategies
Re: Recent Survey Findings in Maryland
Date: December 18, 2015

KEY FINDINGS

The Affordable Care Act is strong here. Marylanders are far more supportive of the ACA than are voters nationwide. According to a November 2014 [Kaiser Family Foundation survey](#), only 37% of Americans are favorable toward the ACA, compared to over half (53%) of Marylanders. Party registration drives this difference; while only 16% of Maryland Republicans view the ACA favorably, Democrats are far more supportive (71%).

Further, few Marylanders want to see Congress repeal the law; only about a fifth (22%) support congressional repeal, and an additional 14% would like Congress to scale back the law's reach. In contrast, a quarter (25%) want to expand the ACA and a plurality (30%) want Congress to move forward with implementing the law as-is. So just over a third want to see the law limited in some way, compared to over half who want expansion or the status quo.

Some have seen the benefits of the Maryland Health Connection. Overall, 15% report having coverage through the Maryland Health Connection. (Coverage is likely being over-reported, as only 100,000 Marylanders are currently enrolled in the program, including those who have just signed up in the current open enrollment season.)

But even more have noticed a benefit of the program. Overall, more than a quarter (28%) say the MHC has improved health care in Maryland (23% hurt), and about as many say the MHC helped them personally (19%) as hurt them (20%). Marylanders are more positive than Americans nationally, as [Gallup showed in October 2014](#), when more felt personally hurt (27%) by the ACA than helped (16%).

Among those in uninsured households, a third say the MHC helped them personally, and think it has improved the state's overall health (32% for each).

There is majority support for the Access to Better Care proposal to improve the ACA in Maryland. A balanced description of an exploratory proposal to improve the MHC (exact wording below) garnered majority support (53%) with more than a quarter (27%) strongly in favor. Support divides along party lines; two-thirds of Democrats (67%) and three-fourths of minorities (75%) favor it. Those favorable toward the ACA, and those in

uninsured households also support this proposal (76%, 57%, respectively). Support is lowest among Republicans – only a quarter (25%) support the proposal.

Access to Better Care Proposal

There has been discussion over what's been called the Access to Better Care proposal, which would change the way the Maryland Health Connection works.

Those in favor of this proposal say it would help patients covered by the Affordable Care Act by making drug costs more predictable, reducing patients' pharmacy bills, and improving access to quality care.

Those opposed to this proposal say it would add more regulations, increase health insurance premiums, and drive up costs for all Maryland taxpayers.

Support for its potential provisions far exceeds support for the proposal overall. We examined a substantial list of potential provisions of the Access to Better Care proposal, and each enjoys widespread support. In particular, voters overwhelmingly express their strong support for openness and transparency about the cost and coverage of prescription drugs (82% strongly favor), increased affordability for prescription drugs (78%), reduced costs for doctor and hospital visits (68%), increased care accessibility (72%), and improved coverage for those with pre-existing conditions (76%). More granular provisions focusing on a prescription drug cap fare less well, but are still popular (59%).

Even those inclined to oppose the proposal still support its potential provisions. A majority of those initially opposed to the proposal and Republicans (who oppose the proposal by 2-to-1), support each of the provisions by large margins. Similar to Maryland voters overall, these groups prioritize increasing openness and transparency in prescription drug costs.

Potential Provisions of the Access to Better Care Proposal (edited and abbreviated for brevity)	Strongly Favor
Require insurance companies to be open and transparent about what drugs are covered, and what patients will pay	82
Make prescription drugs more affordable for patients	78
Crack down on discrimination against patients with pre-existing or life-threatening conditions	76
Make prescription drug costs more transparent and predictable	75
Expand the network of doctors, hospitals and providers that accept insurance through the MHC	72
Require full and open access to information about insurers' denials and appeals	71
Create more tools to help patients calculate the cost of care beyond premiums	68
Reduce what patients pay for doctor and hospital visits	68
Prevent insurance companies from weakening Rx drug coverage mid-way through the year	67
Require all drugs treating a specific disease to be covered by insurance in the same way, no matter what they cost	67
Require plans through the MHC to increase the number of drugs they cover from 61% of all drugs to 75%	66
Require plans through the MHC to lower the average percent of Rx costs patients have to pay from 46% of costs to 30%	62
Change the MHC website so it's easier to compare plans	59
Set a cap so patients never pay more than 10% of their deductibles on Rx drugs	59
End policies requiring doctors to prescribe the cheapest drugs before moving on to more effective, more expensive drugs	49

While transparency broadly is less of a priority, drug price transparency is top-tier.

When asked to name the most important thing that could improve the Maryland Health Connection, only 14% name “increase openness and transparency” as their first choice. Instead, they prioritize reduction in costs and increasing accessibility (23%, 24%). However, transparency about drug costs and coverage specifically is extremely important. As noted above, it’s the top potential provision of our proposal, even among the proposal’s opponents.

All supporting messages best all opposing messages. Even the least effective message supporting the Access to Better Care proposal is still more convincing than the strongest opposition message. Across audiences, the most effective messages reference drug cost transparency and the implication of lower drug compliance. Expanding the provider network, or providing patients with more tools to pick plans work less well, mirroring some of the less attractive proposal provisions cited above.

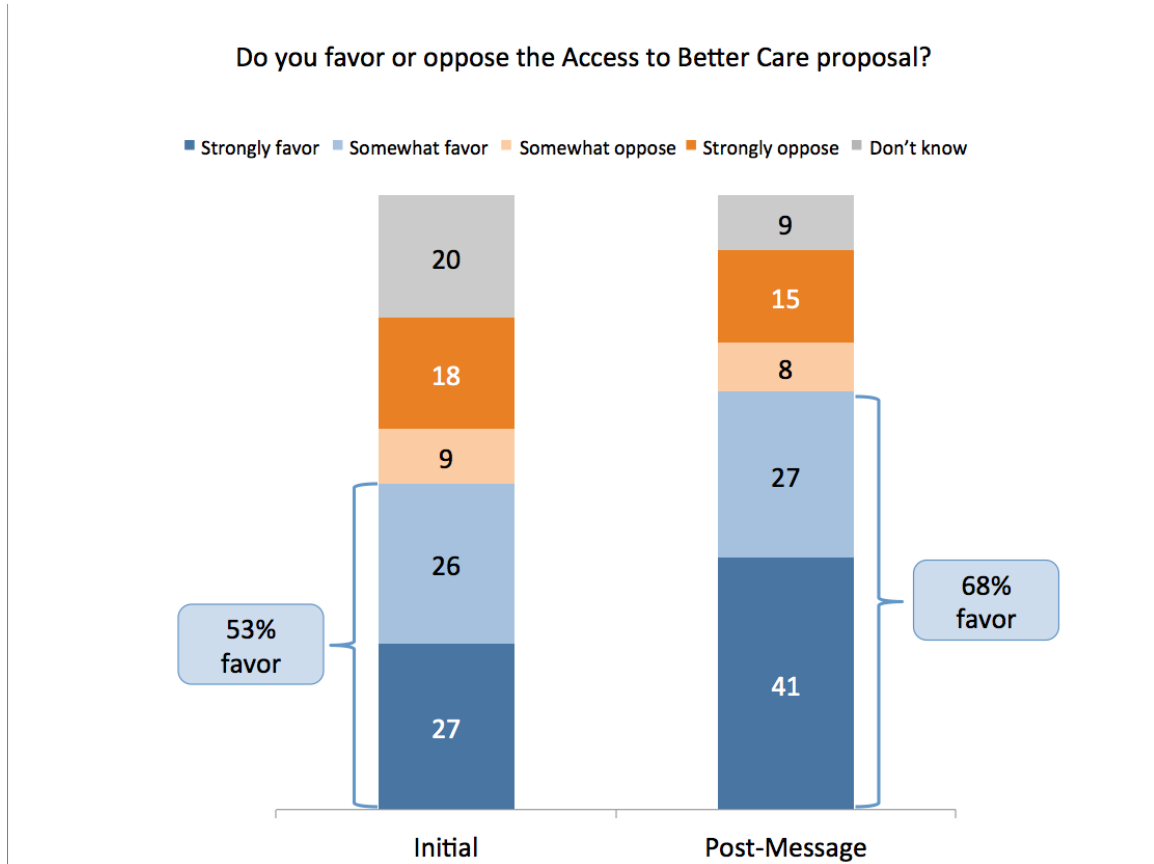
The most effective opposing messages focus on drug companies being responsible for high drug prices, and worries about rising premiums. Messages challenging the broader

effectiveness of ACA are unsuccessful (recall the ACA is far more popular in Maryland than nationally).

Messages in Support of Access to Better Care Proposal (edited and abbreviated for brevity)	Very Convincing
This proposal will increase transparency, so patients know what to expect when they buy Rx drugs.	53
We should make drug coverage more predictable by preventing insurance companies from weakening drug coverage mid-year.	53
If patients can't afford the drugs they're prescribed, they will simply stop taking their medication. This means sicker patients and higher health care costs for all.	52
Before Obamacare, 8M Americans spent > 10% of their household income just on prescription drugs. We need to fulfill the promise of Obamacare by reducing patients' pharmacy bills.	50
Many plans through the MHC simply refuse to cover some drugs. We need to reform Obamacare in MD in order to help the sickest patients get the coverage they need.	49
SPLIT SAMPLE A/B: Obamacare/The MHC has been off to a rocky start. We need to make plans through the MHC/the exchange more clear and more fair.	48
We should reform Obamacare in MD to give patients more tools to estimate their total health care costs, so they can pick the plans best for them.	46
SPLIT SAMPLE A/B: Health insurance is only as strong as its network. We should reform the MHC/Obamacare to make sure patients have access to convenient, quality care.	44

Messages in Opposition to Access to Better Care Proposal (edited and abbreviated for brevity)	Very Convincing
Drug companies are the reason drug prices are so high. If drug companies spent less money on slick TV ads, drug prices wouldn't be as high as they are.	34
People pick their insurance plans based on the size of their monthly premiums. With more regulation, premiums will go up, leading people to pick plans that give them less coverage than they need.	30
This proposal will just add more regulation and bureaucracy, increasing costs for all MD taxpayers, not just those covered by Obamacare.	29
Health insurance plans are already highly regulated. Any more regulation will simply increase costs passed on to all MD patients.	28
Obamacare has only been in effect for one year. We should give it a chance to work before we make major changes to it.	26
Obamacare has been a disaster. We should be working to repeal it entirely, not finding new regulations to add to it.	26
This proposal isn't worth it. It will only benefit a small number of people, and could have unintended consequences for everyone else in MD—even those not part of Obamacare.	23
Drug companies—not patients—will benefit most from this proposal. It will save patients pennies, while leading to higher premiums for all Marylanders.	23

After messaging, support increases. After both positive and negative messaging, support for the Access to Better Care proposal increases by 15%. We should caution this is not a simulation of a campaign; we tested more positive messages than negative ones, and we also provided respondents with far more information than an average voter would have. Nonetheless, this re-test does reinforce the proposal’s strength.



CONCLUSIONS

The ACA is more popular among Marylanders than it is nationally, and the Maryland Health Connection is also relatively strong, with some already seeing the program’s benefits to themselves and the state. This climate helps yield clear support for the Access to Better Care proposal. Further, every potential provision we test is wildly popular—even with the proposal’s initial opponents. It follows that our messaging works well, too, particularly when it reinforces voters’ clear desire for more transparency and predictability in drug costs.

METHODOLOGY

This research study was sponsored by Pharmaceutical Research and Manufacturers of America.

Momentum Analysis and Public Opinion Strategies conducted 500 phone interviews with likely 2016 Maryland voters from December 11-14, 2014. Thirty percent (30%) of interviews were conducted on cell phones, and 70% were conducted on landlines. The margin of error is +/- 4.4.

ABOUT THE RESEARCHERS

Momentum Analysis conducts opinion research for Democratic candidates, progressive causes, and corporations. The firm has conducted extensive research in Maryland for almost two decades.

Public Opinion Strategies is one of the nation's most prominent public opinion research firms, specializing in political, public affairs, public policy, and corporate positioning research. It has been described by the New York Times as "the leading Republican polling company" in the country.