Affordable and Accessible Healthcare

• Reforming the nation’s healthcare system has been the defining policy initiative of the Obama administration. The next President will have to address how to not only advance policies designed to increase patient access to health insurance, but also access to healthcare providers and approved medical therapies.

• Seeking to understand public opinion about the choices faced by policymakers with respect to preserving physician clinical decision making, therapeutic access, and addressing costs of prescription medicines, AfPA commissioned attitudinal research in Iowa, South Carolina and Nevada.

• AfPA found that the bottom line is that survey respondents had one clear message to the next President of the United States: #DoctorKnowsBest
About Doctor Knows Best Survey

- The surveys summarized in this slide deck are the first in a series of studies AfPA intends to release over the course of the 2016 Presidential campaign, designed to highlight public attitudes about health policy questions impacting patient access to approved therapies and appropriate clinical care.

- The survey was conducted by a bi-partisan attitudinal research team of David Binder and Brian Tringali
## Research Methodology

<table>
<thead>
<tr>
<th>Research Phase</th>
<th>Dates</th>
<th>Sample Size / # of Participants</th>
<th>Composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Des Moines, IA Focus Groups</td>
<td>September 4, 2015</td>
<td>8</td>
<td>Likely Democratic Caucusers: Democrats and Independents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>Likely Republican Caucusers: Republicans and Independents</td>
</tr>
<tr>
<td>Iowa Caucus Survey</td>
<td>September 8-10, 2015</td>
<td>N=500</td>
<td>N=250 Likely Democratic Caucusers / N=250 Likely GOP Caucus Voters</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>Likely Democratic Caucusers: Latino Democrats and Independents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>Likely Democratic Caucusers: White Democrats and Independents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>Likely Republican Caucusers: White Republicans and Independents</td>
</tr>
<tr>
<td>Las Vegas, NV Focus Groups</td>
<td>September 17, 2015</td>
<td>8</td>
<td>Likely Democratic Primary Voters: AA Democrats and Independents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>Likely Democratic Primary Voters: White Democrats and Independents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>Likely Republican Primary Voters: White Republicans and Independents</td>
</tr>
<tr>
<td>Columbia, SC Survey</td>
<td>September 22 – October 1, 2015</td>
<td>N=500</td>
<td>N=250 Likely Democratic Caucusers / N=250 Likely GOP Caucus Voters</td>
</tr>
<tr>
<td>Nevada Survey</td>
<td>September 29 – October 1, 2015</td>
<td>N=500</td>
<td>N=250 Likely Democratic Caucusers / N=250 Likely GOP Caucus Voters</td>
</tr>
</tbody>
</table>
Key Findings

• Survey respondents trust their physicians to decide effective course of treatment

• Survey respondents are wary of insurance companies and health plans directing care or limiting treatment options

• While worried about costs, survey respondents value access to effective therapies and medical innovations
Trust Physicians

- Survey respondents have a positive impression of their physicians and trust them to prescribe effective course of treatment.
- Survey respondents prioritize effective treatment.
- When pressed on prescription drugs, respondents say they care more about the impact and effectiveness than cost.
Physicians are universally popular, with greater than three-fourths of primary voters in each state holding a favorable opinion.
Key Quantitative Findings

* A majority of voters across states and parties say medication impact and effectiveness is their top concern, over cost.

Which of the following do you feel is most important when it comes to the medications that you and your family are prescribed by a physician:

That the overall cost is as low as possible OR That the medicine is impactful to my health and as effective as possible?

![Bar chart showing preferences in Iowa, South Carolina, and Nevada]
Wary of Health Plans Directing Patient Care

- Survey respondents have a negative impression of health insurance companies.
- Many respondents feel that insurance company bureaucrats dictate their choice of medications, interfering in their physician-patient relationship.
- Democrats in particular did not like insurance companies “playing doctor” and limiting treatment options.
Health insurance companies get mixed reviews, with near-even ratings in SC and NV primary electorates combined, but a very low mark among Iowa Democrats.

**Popularity Rating: Health Insurance Companies**

- **Iowa**
  - Iowa Dems: 20% Favorable, 72% Unfavorable
  - Iowa GOP: 40% Favorable, 47% Unfavorable

- **South Carolina**
  - SC Dems: 48% Favorable, 39% Unfavorable
  - SC GOP: 47% Favorable, 41% Unfavorable

- **Nevada**
  - NV Dems: 43% Favorable, 42% Unfavorable
  - NV GOP: 37% Favorable, 51% Unfavorable

**Popularity Score: Health Insurance Companies**

- Iowa Dems: -52
- Iowa GOP: -7
- SC Dems: +9
- SC GOP: +6
- NV Dems: +1
- NV GOP: -14
Insurance companies are seen as “middle men” who offer no benefits to patients outside of covering some of the costs.

**Insurance Company Positives:**
- Pay a portion of some prescriptions
- Coverage for catastrophic injuries
- Negotiate with pharmacies and pharmaceutical companies for lower prices

**Insurance Company Negatives:**
- High copays, deductibles, premiums
- Hard to navigate networks to see doctor
- Cheapest course of action, not the best
- Favor generics over brand name drugs
- Overrule doctor’s prescription and treatment recommendations
- Covers less than other countries
- Too much bureaucracy, administrative costs

*Often times a doctor will prescribe a drug then health insurance says ‘you don’t need that’. It’s very annoying.* (Republican voter)

*If your doctor prescribes it, then insurance should cover it.* (White Democratic voter)

*They don’t cover everything that is prescribed to you. They sometimes give cheaper medicines at first that might not work as well and that’s dangerous.* (Latino Democratic voter)
In group discussion, respondents expressed concern over insurance companies’ focus on profits over patients.

Insurance companies shouldn’t decide which drugs you can get. If a doctor prescribes it, I should have coverage for it, not just the cheaper drug. (White Democratic voter)

I pay insurance every month, then when I do get sick and need a prescription, they should pay for it. They made money from me for years I wasn’t sick. (Latino Democratic voter)

It’s interfering with doctor patient privilege. A relationship between me and my doctor, not the insurance company. There’s a reason why my doctor prescribed it for me. (Republican voter)
Respondents feel that the overall costs of healthcare are high and not just the cost of prescription medicine.

The real issue for respondents is "what drugs cost me" vs simply the "what drugs cost."

Respondents are primarily concerned about their own costs for prescription drugs, but understand that costs are influenced by a variety of complex factors.

Having access to medicines is a bigger concern for some than the high cost of medicines.
When asked the question of price, there’s consensus that health care costs are too high in the U.S.

Some people say that the cost of health care in this country is simply too high.

Do you agree or disagree with the statement?

- **IOWA**
  - IA Total: 1 Agree, 0 Don't Know, 0 Disagree
  - IA Dems: 1 Agree, 0 Don't Know, 0 Disagree
  - IA GOP: 1 Agree, 0 Don't Know, 0 Disagree

- **SOUTH CAROLINA**
  - SC Total: 1 Agree, 0 Don't Know, 0 Disagree
  - SC Dems: 1 Agree, 0 Don't Know, 0 Disagree
  - SC GOP: 1 Agree, 0 Don't Know, 0 Disagree

- **NEVADA**
  - NV Total: 1 Agree, 0 Don't Know, 0 Disagree
  - NV Dems: 1 Agree, 0 Don't Know, 0 Disagree
  - NV GOP: 1 Agree, 0 Don't Know, 0 Disagree

- Percent of IA voters who strongly agree: 68%
- Percent of SC voters who strongly agree: 71%
- Percent of NV voters who strongly agree: 70%
"What drugs cost me" is more important to respondents than "what drugs cost"

➢ The primary concern among respondents is what they pay for the prescription drugs they need, whether that is through their insurance or out-of-pocket.

➢ While many believe, when asked, that pharmaceutical companies set the initial drug prices, there is also a basic understanding that their end price is influenced by a variety of factors, including government regulations, competition, pharmacies, need-based discounts, and insurance companies.
• Respondents believe prescription medicines can reduce overall healthcare costs such as hospitalization and surgeries.

• Many accept the premise that high costs of innovation lead to expensive medications, but also that cures that may never develop or are slowed by the FDA. Respondents also worry that insurance carriers won’t cover important drugs.

• Respondents understand and accept the importance of research and development for new prescription medicines and understand that price controls can jeopardize future cures and treatments.

• Respondents are grateful for medical innovation, and felt lower government negotiated costs could drain resources from research and development.
Support for Policy Proposals
Smart policy that strikes a balance

Most Preferred Policy Positions:
✓ We need for medications to be affordable for everyone, but we **can’t disincentivize the drug companies** from investing in curing diseases like cancer. We need the government to **find smart solutions** so that everyone can get the medications they need while continuing to find cures to diseases.

Also Preferred Policy Positions:
✓ The **health insurance companies** restrict access to certain medications if they cost too much. Meanwhile, they **charge outrageous premiums while their profits are at record highs.** We need to reign in the insurance companies and **give the power back to doctors to make medical decisions** for their patients.
✓ Americans **should not have to live in fear that they will go bankrupt if they get sick.** People should not have to go without the medication they need just because **their elected officials aren’t willing to challenge the health insurance companies.**

Less Preferred Policy Positions:
✓ We need to drive a **harder bargain negotiating with drug companies** about the costs of drugs. It is the height of ironies that medications developed in the United States are often sold more cheaply overseas.

It needs to be affordable for everyone. We need government and everyone to come together. We need to get it together. (Black Democratic voter)

No one should have to live in fear of going bankrupt. (White Democratic voter)

We need smart negotiations because pharmaceuticals aren’t going to be willing to give up their profits. (Republican voter)