ALTARUM
HEALTHCARE VALUE HUB

How to Talk About Prescription Drug Affordability

New Focus Group Results

October 3, 2018

Welcome and Introduction

Lynn Quincy

Director, Healthcare Value Hub

Housekeeping

- **Thank you for joining us today!**
- **All lines are muted until Q&A**
- **Webinar will be recorded**
- **Technical problems? Call Tad Lee at 202-776-5126**

Agenda

- **Welcome & Introduction**
  - **Lynn Quincy**, Altarum Healthcare Value Hub
- **How to Talk About Prescription Drug Affordability: New Focus Group Results**
  - **Vinny DeMarco,** Maryland Health Care for All Coalition
  - **Steve Raabe,** OpinionWorks LLC
- **Q & A**

How to Talk About Prescription Drug Affordability: New Focus Group Result

Vincent DeMarco, President
Maryland Citizens' Health Initiative

Steve Raabe, President
OpinionWorks LLC

HEALTH CARE for All
MARYLAND CITIZENS' HEALTH INITIATIVE
2600 ST. PAUL STREET BALTIMORE, MD 21218 P:(410)235-9000 F:(410)235-8963 WWW.HEALTHCAREFORALL.COM

Prescription Drug Affordability Initiative

WHEREAS, to protect our lives and our well-being, every family in Maryland requires access to affordable prescription drugs;

WHEREAS, skyrocketing costs are making some medicines virtually inaccessible to our families and neighbors;

WHEREAS, overall drug prices increased almost 9% in 2016 while general inflation increased just over 2% in the same period, and since 2013 drug prices have risen an average of 10% annually but inflation has only increased 1.2% on average since 2013;

WHEREAS, prescription drug spending accounted for over 22% of each health insurance premium dollar in 2014, and nearly a quarter of people in their deductible period never picked up their prescriptions from the pharmacy, presumably because of the cost;

WHEREAS, over half of Medicare beneficiaries who did not fill at least one prescription reported prohibitive costs as the reason, and that nonadherence results in an estimated $100-$300 billion of avoidable health care costs annually;

WHEREAS, Maryland should continue to lead the Nation in addressing the affordability of prescription drugs, building on the State's landmark 2017 legislation banning price gouging by manufacturers of generic and off-patent drugs.

THEREFORE, BE IT RESOLVED that the undersigned organization supports creating a new Prescription Drug Affordability Board to determine how best to make prescription drugs more affordable for Marylanders, including by: examining the entire drug supply chain, including the role of drug manufacturers and Pharmacy Benefit Managers (PBMs), and establishing payment rates for expensive drugs that create significant affordability problems for Marylanders, building upon Maryland's successful tradition of health care cost scrutiny.

Organization:_____

Address: _____

Phone Number: _____(o)_____(c) Email:_____

Representative (Print Name):_____

Title/Role with Organization: _____

Signature:_____Date:_____

By signing this document, you imply that you have the authority to represent the listed organization.

Please mail, fax, or email completed form to:
Maryland Citizens' Health Initiative, 2600 St. Paul St., Baltimore, MD 21218
Fax: 410-235-8963; Email: catherine@healthcareforall.com
Or fill it out ONLINE at: healthcareforall.com/RxResolution

HEALTH CARE for All
1199SEIU
United Healthcare Workers East
Maryland Division
ACP
American College of Physicians
Maryland Chapter
F.A.C.E.
ADDICTION MARYLAND
Maryland Public Health Association
(MdPHA.org)
Planned Parenthood
Care. No matter what.
Planned Parenthood of Maryland
AARP
Real Possibilities in
Maryland
ADVOCATES
FOR CHILDREN AND YOUTH
AHF
AIDS HEALTHCARE FOUNDATION
AFSCME 3
JCRC
FAMILIESUSA
THE VOICE FOR HEALTH CARE CONSUMERS
MARYLAND ACADEMY OF FAMILY PHYSICIANS
LSPC
MD/DC State Council
SEIU
stronger together.
TWW
TOGETHER WE WILL
NAACP
CASH
CAMPAIGN
OF MARYLAND
The Arc
Maryland
NARAL
Pro-Choice Maryland
The Maryland Academy of Advanced Practice Clinicians
ACR
DOCTORS FOR AMERICA
Maryland PIRG
Standing Up To Powerful Interests
MARYLAND NONPROFITS
JOTF
JOB OPPORTUNITIES TASK FORCE
ADVOCATING BETTER SKILLS, JOBS, AND INCOMES
MARYLAND WORKING FAMILIES
Consumer Health First
Access • Quality • Equity
Latino Public Health Network
Delaware Maryland SYNOD
EVANGELICAL LUTHERAN CHURCH IN AMERICA
CHESAPEAKE CLIMATE ACTION NETWORK
ccan
FreeState JUSTICE
MDCEP
WISE
UNITED SENIORS OF MARYLAND
[Abilities Network]
SEEING ABILITIES NOT DISABILITIES.
PUBLICCITIZEN
MCRC
UNITE HERE! LOCAL 7
PROGRESSIVE MARYLAND
Greater Baltimore Urban League
BALTIMORE JEWISH COUNCIL
PRO BONO COUNSELING PROJECT
DYNAMIC HEALTHCARE
Central Atlantic Conference
Public Justice Center
Baptist Minister's Conference of Baltimore and Vicinity
NASW
MARYLAND CHAPTER
National Association of Social Workers
IMAGE
Independent Marylanders Achieving Growth through Empowerment
Women's Law Center of Maryland
JOHNS HOPKINS SCIENCE POLICY GRO
MOVEMENT DISORDER EDUCATION + EXERCISE
NCADD
MARYLAND
THE UNITED METHODIST CHURCH
Baltimore-Washington Conference
Council 67
AFSCME
We Make Maryland Happen
msea
YP-CDN
Young Professionals Chronic Disease Network Baltimore Chapter
amsa
American Medical Student Association
THE EPISCOPAL DIOCESE OF MARYLAND
MRSPA
DHHS
MONTGOMERY COUNTY
Department of Health and Human Services
WOMEN'S ALLIANCE FOR DEMOCRACY & JUSTICE
Disability Rights Maryland
MC YD
INDIVISIBLE
PHARMACISTS UNITED FOR TRUTH AND TRANSPARENCY
TRUTH5.ORG
DO THE MOST GOOD
Montgomery County, MD
CASA
COLLECTIVE EMPOWERMENT GROUP, INC.
DISABILITY SUPPORT SERVICES

OpinionWorks Credentials

- Measure perceptions, behaviors
- Public polls, focus groups

Maryland Citizens' Health Initiative
- Tobacco tax, Alcohol tax, Health care access, Health care messaging

The Baltimore Sun polling
- Elections and issues since 2007

New York State Dept. of Health
- Lessening consumption of sugary drinks

Chesapeake Bay Trust
- Extensive work assessing environmental stewardship

Clean Air Partners
- Baltimore/Washington air quality survey

West Virginia Department of Health
- Barriers to cancer screening for low-income women

THE BALTIMORE SUN

baltimoresun.com — Informing more than 1 million Maryland readers weekly in print and online — THURSDAY March 10, 2016

PUGH 26% DIXON 24%

The question
If the Democratic primary for mayor were held today, for whom would you vote? Twenty-five percent said they are undecided.

ELECTION 2016 BALTIMORE MAYOR

Poll finds 25 percent of likely Democratic voters are still undecided, and support remains soft for some candidates

WARNOCK 10% MOSBY 6% EMBRY 5% STOKES 3%

Pugh, Dixon virtually tied in primary race

By Luke Broadwater and Yvonne Wenger
The Baltimore Sun

State Sen. Catherine E. Pugh and former Mayor Sheila Dixon are locked in a virtual tie in the Democratic race to become Baltimore's next mayor, a new poll for The Baltimore Sun and the University of Baltimore shows.

Pugh, whose support has surged in recent weeks, is now favored by 26 percent of likely voters in the Democratic primary. That's two points higher than the 24 percent who back Dixon, who has led the field for months. Businessman David L. Warnock, who has spent more than $650,000 on television ads, is in third place with 10 percent.

"It's a tight race between the two leaders," said Steve Raabe, president of OpinionWorks, the Annapolis-based firm that conducted the poll. "Sheila Dixon has been matched and potentially overtaken by Catherine Pugh. People who decided recently are going toward Pugh."

City Councilman Nick J. Mosby was in fourth with 6 percent, followed by lawyer Elizabeth Embry with 5 percent and

The poll
This poll is a joint venture of The Baltimore Sun and the University of Baltimore's College of Public Affairs and Schaefer Center for Public Policy.
Coming Friday:
The presidential primaries

$535M sought in city TIF aid

Sagamore wants help with infrastructure for Port Covington

By Natalie Sherman
The Baltimore Sun

The city is being asked to contribute $535 million to help finance the redevelopment of Port Covington, where billionaire Under Armour CEO Kevin Plank has embarked on a plan to transform the peninsula with offices, homes, shopping, restaurants, parks and a state-of-the-art campus for his growing company.

The city money would help pay for streets, utilities, parks, and highway and transit improvements for the roughly $5.5 billion project.

Sagamore Development, Plank's private real estate firm, estimates that infrastruc-

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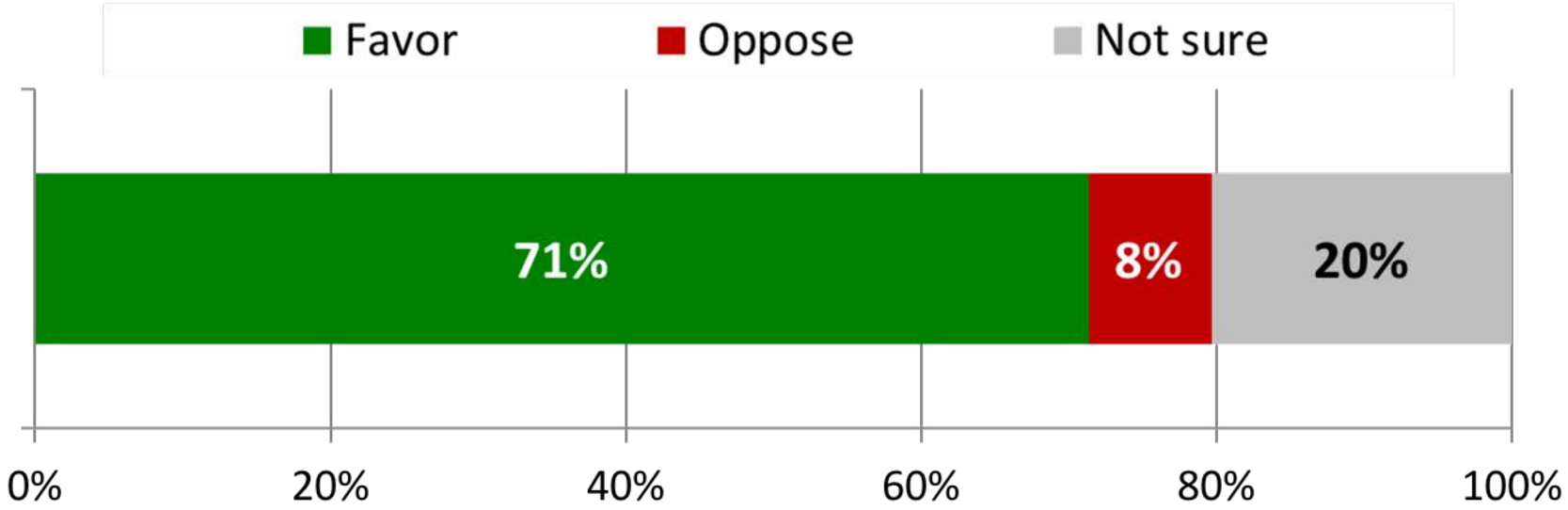
OPINIONWORKS PUBLIC SPIRITED RESEARCH

2017 Statewide Voter Poll

OpinionWorks
Oct 25-Nov 7, 2017
Maryland Statewide

Prescription Drug Price Gouging Law

Testing Support for the Law Passed in the 2017 General Assembly Session



"Last April, Maryland became the first state in the nation to pass a law that protects consumers against price gouging by drug corporations. The law authorizes Maryland's attorney general to sue drug corporations to prevent unconscionable price increases in generic or off-patent prescription drugs…

"From what you know right now, do you favor or oppose Maryland's prescription drug price gouging law?"

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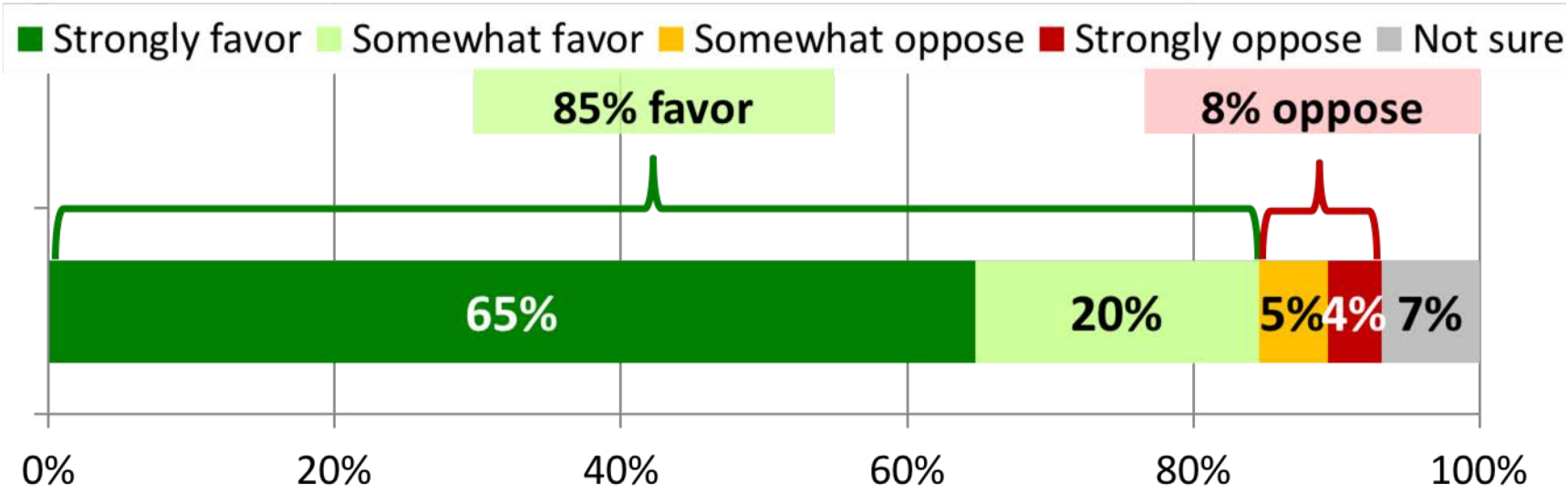
OPINIONWORKS PUBLIC SPIRITED RESEARCH

OpinionWorks
Oct 25-Nov 7, 2017
Maryland Statewide

Price Increase Notification



"There are several other proposals intended to protect consumers against high prescription drug costs in Maryland. I would like to read you three of them and ask your opinion. For each one, please tell me if you would strongly favor, somewhat favor, somewhat oppose, or strongly oppose it…

"Require prescription drug corporations to notify the public about expensive new drugs and large price increases for older drugs, and to justify those pricing decisions."

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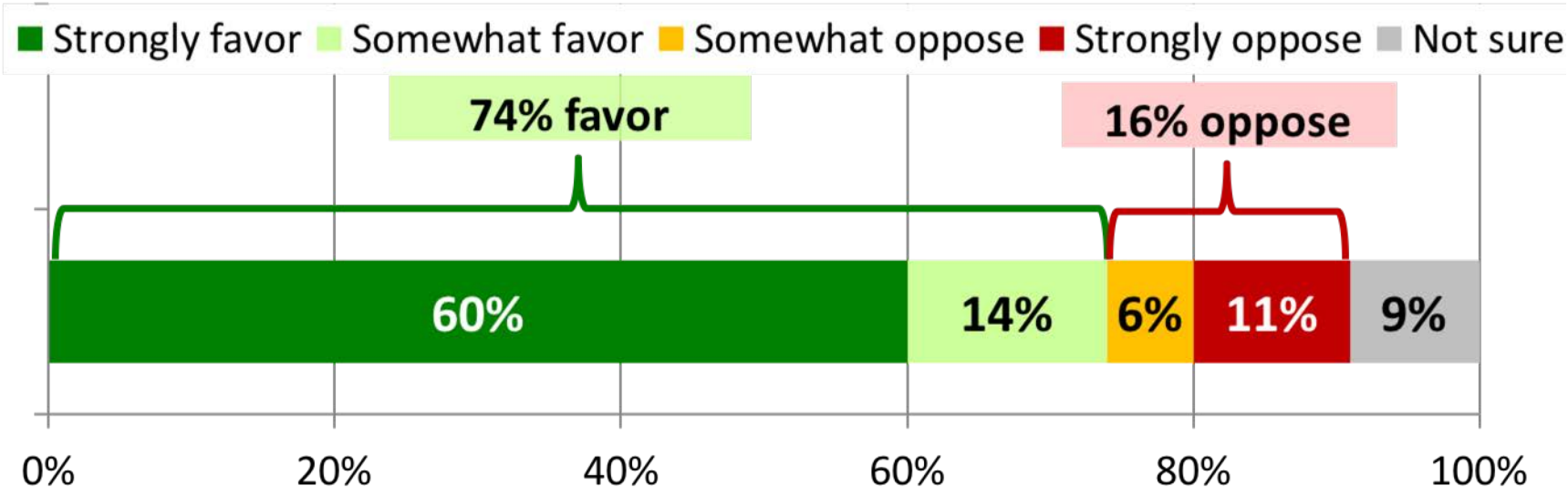
OpinionWorks
Oct 25-Nov 7, 2017
Maryland Statewide

Prevent Commercial Managers of Drug Plans from Restricting What Pharmacists Can Tell Consumers



"There are several other proposals intended to protect consumers against high prescription drug costs in Maryland. I would like to read you three of them and ask your opinion. For each one, please tell me if you would strongly favor, somewhat favor, somewhat oppose, or strongly oppose it…

"Prevent commercial managers of prescription drug plans from restricting what pharmacists can tell consumers about lower-cost drug options, as they sometimes do today."

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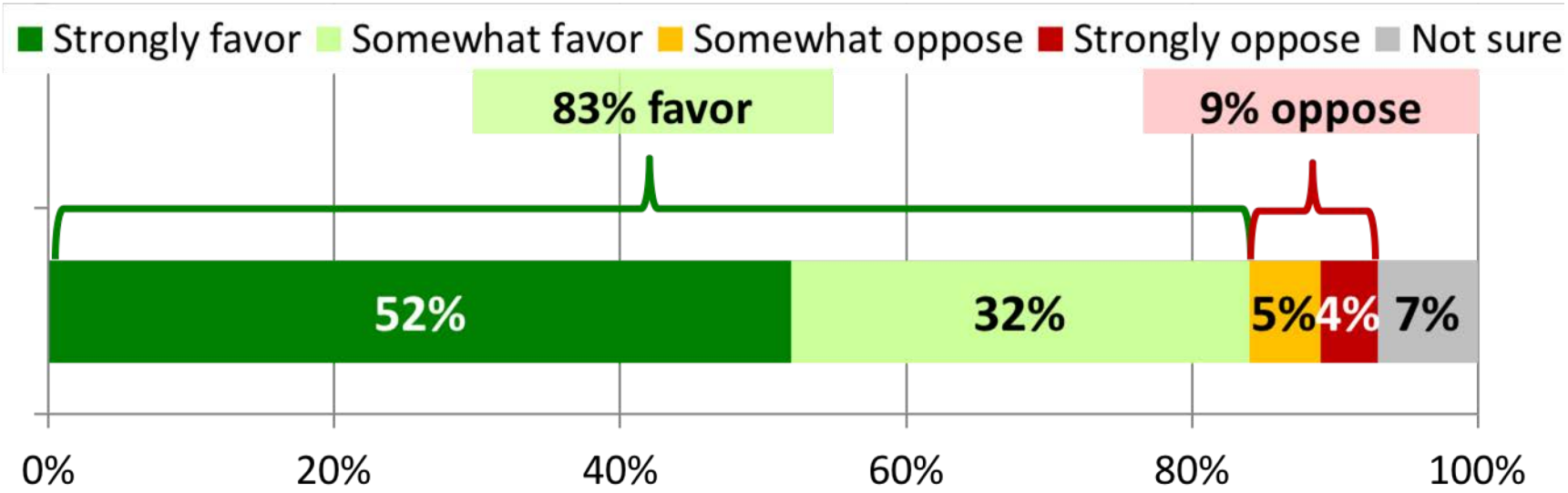
OPINIONWORKS PUBLIC SPIRITED RESEARCH

OpinionWorks
Oct 25-Nov 7, 2017
Maryland Statewide

Prescription Drug Cost Review Commission



"There are several other proposals intended to protect consumers against high prescription drug costs in Maryland. I would like to read you three of them and ask your opinion. For each one, please tell me if you would strongly favor, somewhat favor, somewhat oppose, or strongly oppose it…

"Create a Maryland Prescription Drug Cost Review Commission in Maryland to examine the evidence and establish acceptable costs for drugs."

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Research Method

Focus Groups

- August 14 & 18, 2018
- Two-hour sessions (3)
  A. Annapolis-area Republicans, focused on Legislative District 30
  B. Baltimore City African-American voters
  C. Suburban Baltimore voters, focused on Legislative District 8
- Professional facilitator
- Dinner table
- Probe feelings and intangibles

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Overall Context

Widespread experience with drug cost stress.

Very emotional, heartfelt response.

Positive attitude: We can fix this!

Prescription Drug Affordability Board

JWORKS
PUBLIC SPIRITED RESEARCH

Message Testing: #1 Proponent Message

"Big PhRMA – the big drug companies – spend almost twice as much on advertising their products than on research and developing new drugs.

(That's just wrong.)"

Segment	Level of Agreement*	Rank
Annapolis Area Republicans	3.86	1st
Baltimore City African-American Voters	4.86	1st (Tie)
Legislative District 8 Voters	4.67	3rd
Overall	**4.45**	**1st**

*5=Strongly Agree, 4=Somewhat Agree, 3=Neutral, 2=Somewhat Disagree, 1=Strongly Disagree

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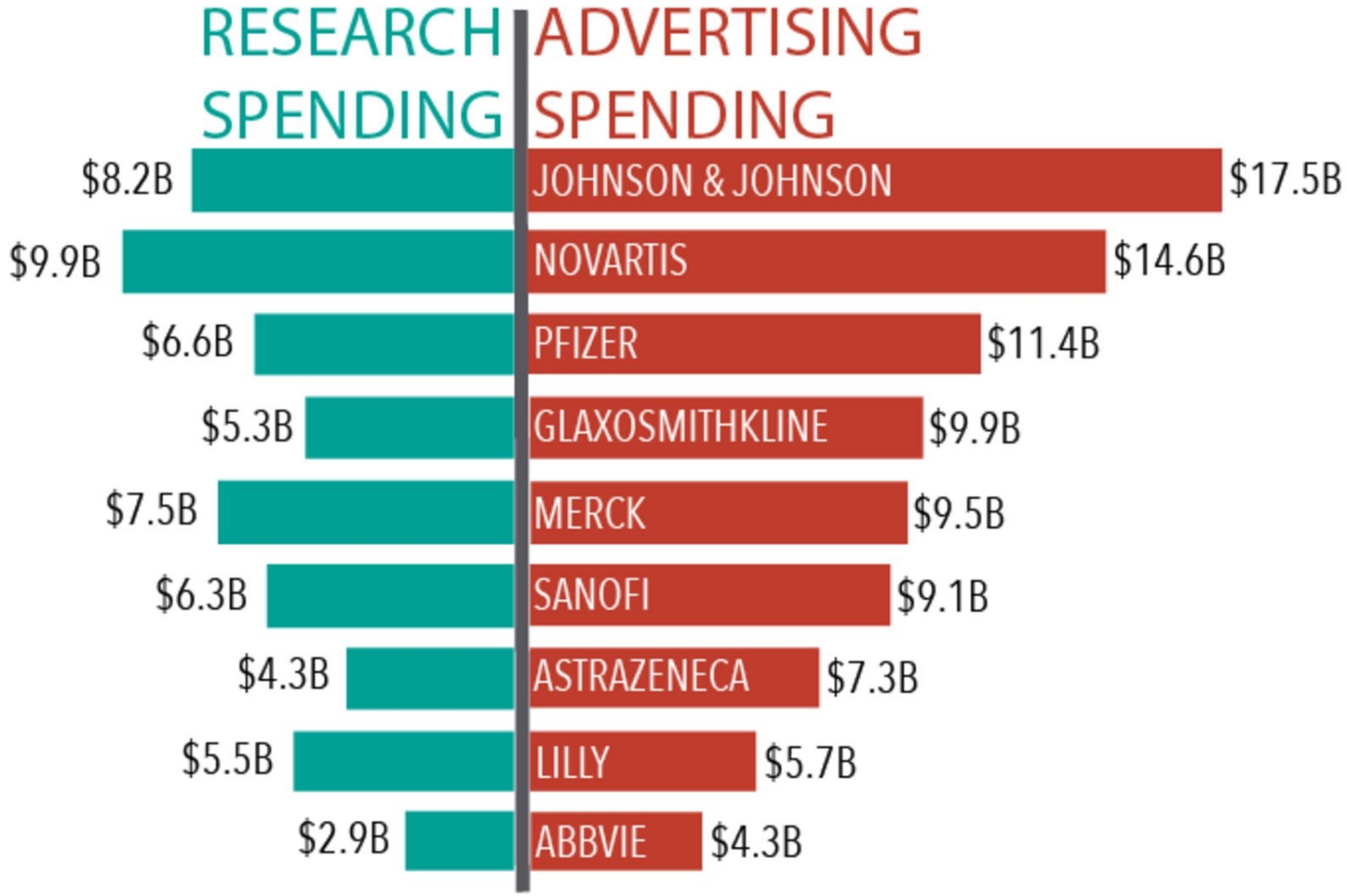
OPINIONWORKS PUBLIC SPIRITED RESEARCH



The Washington Post, Big Pharmaceutical Companies are Spending Far More on Marketing than Research; February 11, 2015

NORKS
BLIC SPIRITED RESEARCH

Message Testing: #2 Proponent Message

"It bothers me that many Marylanders can't afford their medicines, sometimes having to choose between buying their prescriptions or paying the rent and buying groceries."

Segment	Level of Agreement	Rank
Annapolis Area Republicans	3.71	2nd
Baltimore City African-American Voters	4.71	3rd (Tie)
Legislative District 8 Voters	4.83	2nd
Overall	**4.40**	**2nd**

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Message Testing: Proponent Message

"Drug companies pay their executives lavish salaries and make enormous profits. Maryland taxpayers get gouged while CEOs get rich. These drug companies are gouging consumers because they can; the system is rigged in their favor."

Segment	Level of Agreement	Rank
Annapolis Area Republicans	2.86	10th (Tie)
Baltimore City African-American Voters	4.86	1st (Tie)
Legislative District 8 Voters	5.00	1st
Overall	**4.20**	**3rd**

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WE ALL PAY THE PRICE SO THEY CAN GET RICH

The True Cost of Prescription Drugs

PATIENTS

More and more Marylanders are forced to choose between prescription drugs and other necessities, like rent and groceries, and others are forced to go without their medications.

They are people like:

Larry, who suffers from Parkinson's disease. Even with insurance he is unable to afford the best course of treatment, which would cost him over $8,000 per month.

Peggy, who at 72, works five nights a week to be able to afford her prescription drugs.

the 45 million Americans who did not fill a prescription in 2016 due to cost. Others are forced to skip or reduce dosage, resulting in less effective treatment, illness, and even death.

PREMIUMS

The rising costs of prescription drugs are a major contributor to overall healthcare expenditures and result in higher premiums.

"In 2017 drug cost, from both the medical and pharmacy benefit, was the single largest contributor to overall spending at CareFirst at approximately 33%. This is larger than specialists, inpatient or outpatient, and any other cost at CareFirst, and continuing to rise." Chet Burrell, former CEO, CareFirst BlueCross BlueShield

Insurers setting their 2018 premiums for Maryland's individual market assumed their drug costs will grow 17% from last year, while expecting just a 6% growth for medical care.

Insurers setting their 2018 premiums for Maryland's small employer group market assumed drug spending will grow 10% from last year, which is more than the 7.5% growth they report for medical care.

PUBLIC HEALTH/ TAXPAYERS

The skyrocketing costs of prescription drugs threaten the public health of Marylanders.

At the height of the opioid epidemic, communities across Maryland struggle to afford naloxone, a lifesaving antidote to overdose. In recent years, some manufacturers have raised their prices over 500%

Maryland receives a "C" when evaluating the state's Hepatitis C Medicaid access. With some medications costing as much as $84,000, the state is forced to triage patients, treating only those who have suffered from moderate to severe liver damage.

In addition to paying for our own drug coverage, our state taxes support the growing cost of drug coverage for Medicaid; prisons; state, local, university employee, retirees, and dependents. That's about 30% of the state population.

What can I do?

With your help, we can address these issues by creating a Drug Cost Commission in Maryland

HEALTH CARE for All

Join the Prescription Drug Affordability Coalition today!

Visit healthcareforall.com/RxResolution and sign-on to be a part of the initiative!

Share your story!

Visit healthcareforall.com/hearmystory

For questions or comments contact us at healthcareforall.com or call 410-235-9000

Message Testing: #1 Industry Message

"Drug companies should not bear all the blame for high costs. Middlemen like insurance companies and pharmacy benefit managers determine how much patients actually pay."

Segment	Level of Agreement	Rank
Annapolis Area Republicans	4.29	1st
Baltimore City African-American Voters	2.86	3rd (Tie)
Legislative District 8 Voters	3.67	1st
Overall	**3.60**	**1st**

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Message Testing: #2 Industry Message

"Over the long term, paying for new breakthrough treatments will save millions in health care costs."

Segment	Level of Agreement	Rank
Annapolis Area Republicans	3.64	5th
Baltimore City African-American Voters	3.29	1st
Legislative District 8 Voters	3.00	2nd (Tie)
Overall	**3.33**	**2nd**

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Additional Observations

"Fairness" resonates with more conservative voters.

Patients want their voice to be represented.

People don't want politicians anywhere near this concept.

The Commission or Board should be small and independent.

Need for validation of facts.

HEALTH CARE for All
MARYLAND CITIZENS' HEALTH INITIATIVE
DRUGS DON'T WORK IF PEOPLE CAN'T AFFORD THEM.
www.healthcareforall.com

HEALTH CARE for All
MARYLAND CITIZENS' HEALTH INITIATIVE
2600 ST. PAUL STREET BALTIMORE, MD 21218 P:(410)235-9000 F:(410)235-8963 WWW.HEALTHCAREFORALL.COM

Prescription Drug Affordability Initiative Candidate Endorsers

Governor

Ben Jealous – D

Senate

33 Total Senate Endorsers
(21 Cosponsors)

District 3
Ronald Young – D

District 4
Jessica Douglass – D

District 8
Katherine Klausmeier – D

District 9
Katie Fry Hester – D

District 10
Delores G. Kelley – D
Stephanie Boston – R

District 12
Clarence K. Lam – D*

District 13
Guy Guzzone – D

District 14
Craig J. Zucker – D

District 15
Brian Feldman – D

District 16
Susan C. Lee – D

District 17
Cheryl Kagan – D

District 18
Jeff Waldstreicher – D*

District 19
Ben Kramer – D*

District 20
Will Smith – D

District 21
Jim Rosapepe – D

District 22
Paul G. Pinsky – D

District 23
Douglas J. J. Peters – D

District 24
Joanne C. Benson – D

District 26
Obie Patterson – D

District 28
Arthur Ellis – D

District 30
Sarah Elfreth - D

District 32
Pamela Beidle – D*

District 37
Holly Wright - D

District 38
Jim Mathias – D

District 39
Nancy King - D

District 40
Antonio Hayes – D*

District 41
Jill Carter – D

District 42
Robbie Leonard – D

District 43
Mary Washington – D*

District 44
Shirley Nathan-Pulliam – D

District 45
Cory V. McCray – D*

District 46
Bill Ferguson – D

House of Delegates

99 Total House Endorsers
(54 Cosponsors)

District 1A
Michael Dreisbach - D

District 3A
Karen Lewis Young – D
Carol Krimm - D

District 4
Darrin Smith - D
Lois Jarman - D

District 6
Nicholas D'Adamo, Jr. - D

District 7
Rick Impallaria – R

District 8
Harry Bhandari - D
Carl Jackson - D

District 9A
Natalie Ziegler – D

District 9B
Courtney Watson – D

District 10
Benjamin Brooks – D
Jay Jalisi – D
Adrienne A. Jones – D

District 11
Shelly Hettleman – D
Dana Stein – D

District 12
Eric Ebersole – D
Terri Hill – D
Jessica Feldmark - D

District 13
Vanessa Atterbeary – D
Jen Terrasa – D

District 14
Anne R. Kaiser – D
Eric Luedtke – D
Pamela Queen – D

District 15
Kathleen Dumais – D
David Fraser-Hidalgo – D
Lily Qi – D
Harvey Jacobs – R

District 16
Ariana Kelly – D

District 17
Kumar P. Barve – D
Jim Gilchrist – D
Julie Palakovich Carr – D

District 18
Al Carr – D
Jared Solomon – D

District 19
Bonnie Cullison – D
Vaughn Stewart – D
Charlotte Crutchfield – D

District 20
David Moon – D
Jhaenelle Wilkins – D
Lorig Charkoudian - D

District 21
Ben Barnes – D
Joseline Peña-Melnyk – D
Mary Lehman – D

District 22
Tawanna P. Gaines – D
Anne Healey – D
Alonzo T. Washington – D

District 23A
Geraldine Valentino-Smith – D

District 23B
Marvin E. Holmes, Jr. – D
Ron Watson – D

District 24
Erek L. Barron – D
Jazz Lewis – D
Andrea Harrison – D

District 25
Darryl Barnes – D
Dereck E. Davis – D

District 26
Kris Valderrama – D
Veronica Turner – D

District 27A
Susie Proctor – D

District 27B
Michael A. Jackson – D

District 27C
Jason Fowler - D

District 28
Edith J. Patterson – D
Debra Davis – D
C.T. Wilson – D

District 30A
Alice Cain – D

District 31A
Ned Carey - D

District 32
Mark S. Chang – D
J. Sandy Bartlett – D
Mike Rogers – D

District 33
Pam Luby – D
Heather Bagnall – D

District 34A
Mary Ann Lisanti – D
Steve Johnson – D

District 35B
Ronnie Davis – D

District 36
Crystal Woodward – D

District 37A
Sheree Sample-Hughes – D

District 39
Kirill Reznik – D
Gabriel Acevero – D
Lesley Lopez – D

District 40
Frank M. Conaway, Jr. – D
Nick Mosby – D
Melissa Wells – D

District 41
Samuel "Sandy" Rosenberg – D
Tony Bridges – D
Dalya Attar – D

District 42A
Stephen Lafferty – D

District 43
Curt Anderson – D
Regina Boyce – D
Maggie McIntosh – D

District 44A
Keith E. Haynes – D

District 44B
Charles E. Sydnor, III – D
Pat Young – D

District 45
Talmadge Branch – D
Cheryl D. Glenn – D
Stephanie Smith – D

District 46
Luke Clippinger – D
Robbyn Lewis – D
Brooke Elizabeth Lierman – D

District 47A
Diana M. Fennell – D
Julian Ivey – D

District 47B
Wanika Fisher – D

Bold = 2018 Cosponsor, *Italic = Incumbent (Not a Cosponsor),* *= Current Delegate Running for Senate

Bold = 2018 Cosponsor, *Italic = Incumbent (Not a Cosponsor),* *= Current Delegate Running for Senate

Discussion

Questions for our Speakers?

- **Use the chat box or to unmute, press *6**
- **<u>Please do not put us on hold!</u>**

Upcoming Webinar

October 26

Pay for Success and SIPPRA: A Model for Investing in Social Determinants of Health

Register at www.HealthcareValueHub.org/Events

Thank you!

Vinny DeMarco, President, Maryland Coalition for All

Steve Raabe, President, OpinionWorks

Robert Wood Johnson Foundation

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