

KEY STRATEGIC FINDINGS from Polling on Healthcare

MARTILA STRATEGIES

May 9, 2011

to

*The National Council of Women's Organizations Women's Health Task Force
and The Jacobs Institute of Women's Health*

Introduction

On the following pages, you will find a power point presentation used to support a briefing I made to the Women's Health Task Force of the National Council of Women's Organizations and The Jacobs Institute of Women's Health. The briefing was on May 9, 2011.

The theme of my remarks was "Key Strategic Findings from years of polling on health care" – and my comments were meant to help inform a winning strategy for preserving the Affordable Care Act (ACA).

The findings are backed up by extensive survey data from our own work (see slide 3) – and from independent polling of major news organizations and academic research centers. But the presentation minimizes the number of specific poll results. Instead, it maximizes key conclusions about American public opinion that I believe are an essential foundation for successful strategic planning. Some of my conclusions may be surprising, but they are based on accurate readings of American public opinion.

In particular, I have attempted to identify poll results that have endured over multiple years (slides 25-27). For example, Americans are/have been surprisingly happy with their health care generally, and their health insurance coverage, specifically.

These findings have endured for more than a decade – and they have important strategic implications.

One of my most important strategic judgments – backed up by extensive polling and focus group research – is that most Americans struggle with the substantive details of health care policy, including ACA. Therefore, any winning health care strategy must take this fundamental reality into account.

While Americans may not know much about the details of health policy, they feel very strongly about the care they and their family receive. And they bring to this consideration strongly held core beliefs and values. This judgment goes to the heart of my central strategic thesis:

My fundamental recommendation is that public strategies promoting health care reform and ACA must be built on a platform of American values about health care. And, in this regard, I believe the proponents of ACA have underutilized "values assets" (slides 22-24) that can still be effectively deployed during the coming year.

*John Marttila
President, Marttila Strategies*

Survey highlights and strategic observations are drawn, in part, from:

National Survey for Schwartz Center for Compassionate HealthCare /
October 2010 / 1300 Interviews / Recent hospital patients & hospital doctors

National Survey for IMS Health / 2000 Voter Interviews May 2010

National Survey for PhRMA / 1600 Voter Interviews July 2009

National Survey for IMS Health / 2000 Voter Interviews February 2009

Strategic Research for the MA Universal Coverage Bill / February 2007

National Survey for PhRMA on Medicare / 2000 Voter Interviews July 2006
500 seniors on Medicare D, 500 seniors NOT on D, 1000 voters <65

Multiple focus groups in different states.

Numerous statewide surveys.

WINNING STRATEGIES

Winning strategies are derived from the most TOUGH-MINDED ASSESSMENT of the perceived strengths and weaknesses of *your* arguments – and the perceived strengths and weaknesses of the arguments of *your* policy/political opponents.

NO wishful thinking—do not cook the research books.

CRITICAL QUESTIONS

1. What do Americans **KNOW**—really know about the substance of an issue?
2. What can they **LEARN**? What can they **NEVER** learn?
3. What are their **BELIEFS/VALUES** about the issue?
4. What is the issue's political **SALIENCE**?

KEY FINDINGS ABOUT HEALTH CARE THAT MUST INFORM STRATEGY

1. A majority of Americans do not/will not understand the substantive details of the Affordable Care Act, or health care policy, generally. It has been ever thus.
2. Given this lack of substantive understanding, a communications platform based on CORE VALUES is essential.
3. Americans are surprisingly happy with their CURRENT health care, health insurance coverage, prescription coverage—even their health care costs. They believe ACA will benefit others, not them—and it will increase their own costs.
4. They do have very real concerns about all aspects of their FUTURE health care.
5. Americans have many concerns about our country's larger health care system – and the need for significant change but the Republican criticism regarding unaffordable costs has gained traction (at this time).
6. A sharp partisan, ideological divide has existed from the earliest moments of the Obama administration. In this regard, there are 5—not 3—political parties.
7. Doctors and nurses are increasingly unhappy about the changes sweeping through our health care system. These criticisms preceded the passage of ACA, but they could be used against the legislation.
8. Women have been/will be more supportive of health reform and ACA, specifically.

WOMEN HAVE BEEN MORE SUPPORTIVE OF HEALTH REFORM THAN MEN.

Women with postgraduate degrees, and single women, are among the most progressive political cohorts.

After hearing arguments for and against the health care reform law, a plurality of Americans oppose it.

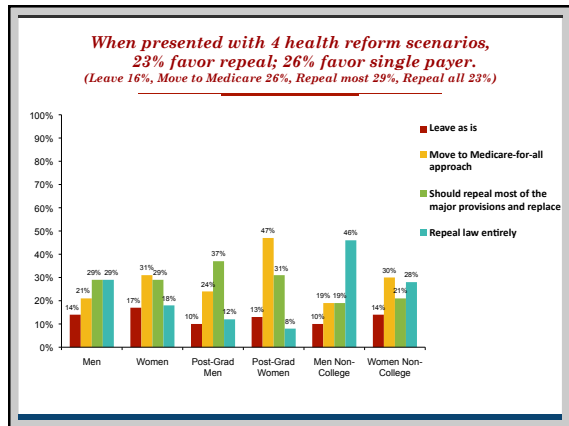
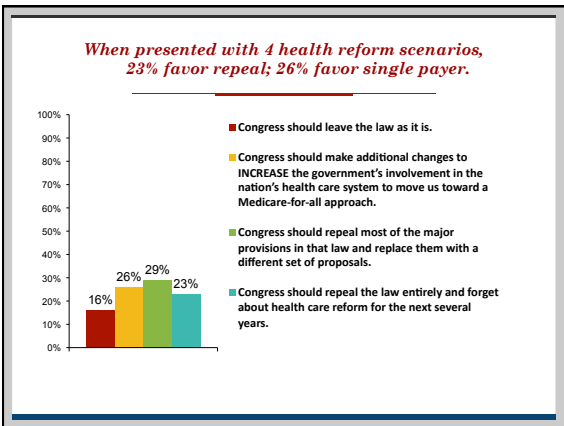
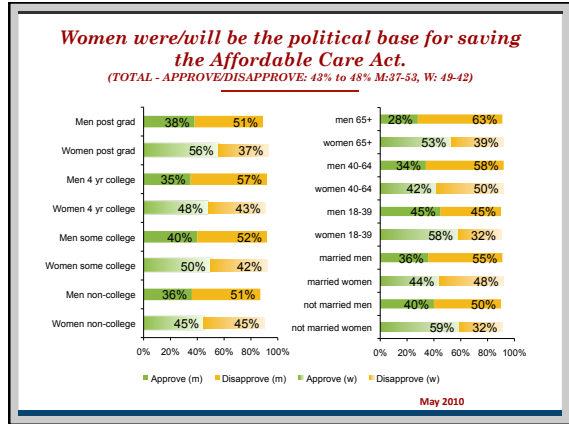
The new law prevents insurance companies from denying insurance coverage because of pre-existing medical conditions or canceling policies because a policy holder becomes ill. It effectively eliminates medical bankruptcy by preventing financial limits on annual bills or financial limits for specific illnesses. Children can stay on their parents' policies until age 26. The Congressional Budget Office says the law will reduce the deficit over the next 10 years. (Positive summary)

Percent of Americans For ACA 43%

The new law inserts the national government into the U.S. health care system by requiring that every American have insurance coverage and by requiring every business with more than 50 employees to provide employees insurance coverage. The directives in the bill lead to the nationalization of our health care system and take away individual freedom. The law is wildly expensive and will cause the deficit to explode. (Negative summary)

Percent of Americans Against 48%

IMS May 2010



**WHAT DO PEOPLE KNOW?
HOW DO THEY FEEL
ABOUT THEIR CARE?**

Americans are surprisingly satisfied with their own care and coverage but have clear concerns about the future and the health care system, generally. They don't know much about the details of health care policy generally, or ACA.

Americans believe they have a responsibility to educate themselves about their medical conditions so that they can take an active role in deciding their treatments.

Please tell me which statement you agree with more:

A Doctors and other health care professionals should be the only people determining treatment options for patients. While Medical sites on the Internet, like Web MD, provide some useful information, average Americans are not qualified to make judgments about their own medical treatment and can be swayed by erroneous information.

B Americans have a responsibility to learn as much as they can about health care conditions and take better care of themselves. The explosion of medical information on the Internet, at sites like Web MD, has been one of the most important advances in improving health care outcomes in the country. Americans can be trusted to use this information to complement the advice of their doctors.

Percent who agree: **31%** (A) **64%** (B)

A Doctors and other health care professionals should be the only people determining treatment options for patients.

B Americans have a responsibility to themselves to learn as much as they can about their specific health condition, so they can better judge the treatments their doctor advises as well as making informed choices in their lives.

Percent who agree: **29%** (A) **68%** (B)

FIRST PRINCIPLE: Many Americans—even the best educated—have a limited understanding of the Affordable Care Act. And, some of the key substantive details will never be fully understood.

This reality must inform the public case for health reform.

1. Americans have always struggled with the **financial and policy details about health care**. For most people, it is truly arcane.

It has been no different during the past few years—as recent polling has indicated—even with the massive press coverage about the ACA debate.
2. Profound change **in news coverage**—we are going through a communications revolution—in which news is dispensed and consumed in radically different ways—sometimes with calamitous results.

FIRST PRINCIPLE: Many Americans—even the best educated—have a limited understanding of the Affordable Care Act. And, some of the key substantive details will never be fully understood.

This reality must inform the public case for health reform.

3. High levels of health insurance coverage (88% among voters) – and minimal **“financial skin in the game”** mean Americans are not drawn to the issue barricades.
4. **The high levels of satisfaction** with their health care and their health insurance coverage create/have created a disincentive for people to dig into the details of health care policy.

Americans’ ongoing high level of satisfaction with their health care and health insurance coverage must inform strategy.

How satisfied are you with the quality of the health care that you and your family receive?

Satisfied:	88%	Not Satisfied:	11%
	2009: 87%		2009: 11%

How satisfied are you with your health insurance coverage? (88% among voters)

Satisfied:	89%	Not Satisfied:	10%
	2009: 85%		2009: 14%

How satisfied are you with your prescription drug insurance coverage?

Satisfied:	91%	Not Satisfied:	8%
	2009: 86%		2009: 12%

Americans are very satisfied with their prescription insurance coverage, believe their prescription medicines are vitally important to their health, and that the costs for these drugs are reasonable.

IF TAKE RX DAILY: On a scale of 1-10 with ten being the most important, and one being not important at all, how would you rate the importance of your prescription drug medication to your overall health?

78% of daily users rate medicines as very important (8,9,10) to their overall health on a 10-point scale

61% TAKE RX DAILY

And how satisfied are you with your prescription drug insurance coverage?	8%	91%	52% very satisfied
And how satisfied are you with the COST of your prescription drug insurance coverage?	14%	85%	44% very satisfied
And how satisfied are you with the COST you personally pay for prescription drugs?	15%	84%	42% very satisfied

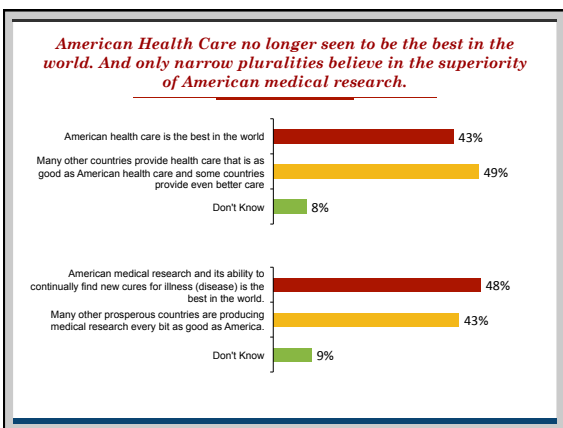
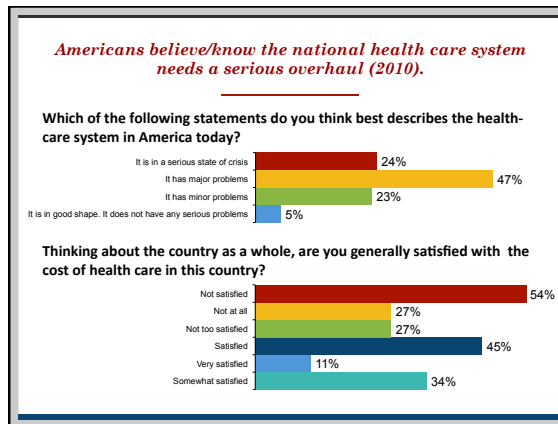
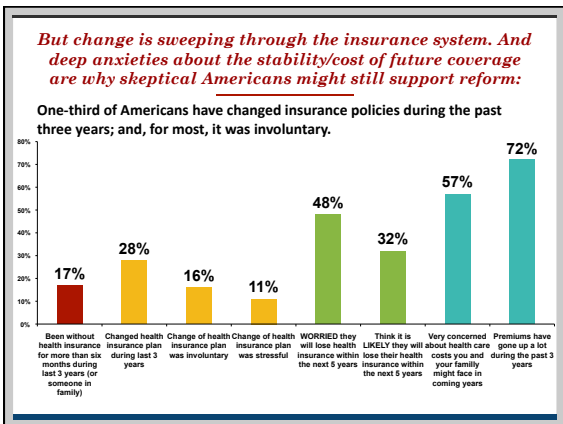
By decisive margins, Americans believe their health insurance coverage is better than most other Americans.

When you compare your health insurance to the health insurance of other Americans, would you say your health insurance is better or worse than most Americans?

Better	61%
Worse	8%
No difference	24%

Superb ratings for “the people with whom Americans come in contact on a regular basis to receive their medical care.”

The doctor you see regularly	
Favorable	85%
Unfavorable	5%
The nurses with whom you interact most frequently	
Favorable	82%
Unfavorable	3%
Your regular pharmacist	
Favorable	80%
Unfavorable	3%



AMERICAN HEALTH CARE VALUES

When Americans think about health care, they think about it based on their own experience and VALUES—and not through the prism of policy details.

American Health Care Values

Americans don't believe any family should be financially devastated by catastrophic illness.

Americans don't believe anybody should be denied insurance coverage because of a pre-existing medical condition.

Americans want ALL American kids to have good health care coverage.

Americans hold their doctors and nurses in very high regard. And they want these health care professionals to make their medical decisions – not insurance company bureaucrats.

American Health Care Values

There is extraordinary churn in the health insurance system: Stable, enduring insurance protection is becoming increasingly important to Americans of all political persuasions.

Americans don't want the government involved in dispensing health care, but they definitely want government health guarantees, e.g., patients' bill of rights, prescriptions for seniors, full coverage, etc.

Americans support universal coverage, but they have no idea how to make it happen. Support for universal coverage crosses party and ideological lines. Americans want universal coverage because they worry about the loss of their own coverage—but support for universal coverage is also a morally based concern—Americans genuinely worry about what happens to people without coverage but concern about the cost of universal coverage is increasing.

Other American Beliefs/Judgments about Health Care

Americans give very high ratings to the health care they and their families receive, their health insurance coverage, their recent hospital care – and even their prescription insurance coverage.

Many Americans believe Medicare is at risk, and many younger Americans doubt it will be there when they need it. Also, Medicare’s freestanding gold standard identity is eroding.

Americans don’t know much about Medicaid, especially those parts of the program that provide coverage for poor seniors, seniors in nursing homes and for people with disabilities.

The issue of health care costs is back on the front burner. Americans believe/know/worry that they will be paying more and more, for less and less insurance coverage. Few, if any, believe their premiums will/can be reduced in the future.

Other American Beliefs/Judgments about Health Care

Americans believe/know/worry employers are likely to cut back health care benefits even further—a development they see as being largely inevitable. They also believe that in the ideal world, all employers should provide health care coverage—but employer mandates, while initially appealing, rarely survive a lengthy discussion in focus groups.

There is a widespread belief that patients have to be their own advocates in new era of managed care. But this is not a happy thought to many vulnerable audiences.

Americans believe seniors should have prescription drug coverage, but this issue has always had less political salience among the general population than many Democrats believe. Only a tiny percentage of seniors have sought prescriptions from Canada.

Other American Beliefs/Judgments about Health Care

Americans believe the current health care system is driven by the desire for profits, even among not-for-profit hospitals; Americans do not understand the distinction between for-profit hospitals and not-for-profit hospitals.

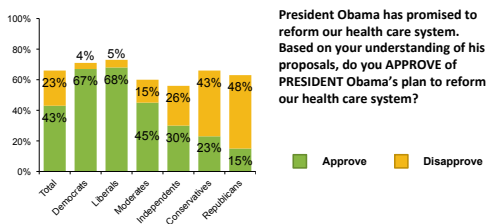
Americans continue to be sharply critical of what they believe is the pharmaceutical industry focus on profits at the expense of curing disease. However, Americans who take at least one prescription drug per day consider these medications vital to their health.

Americans are antagonistic toward insurance companies -- organizations that they believe are totally motivated by profit and have gained too much decision-making power in health care. HMOs are held in higher regard, even though many function similarly to health insurance companies.

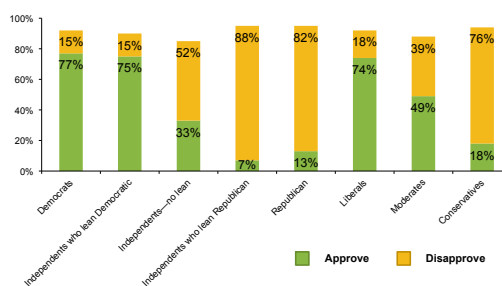
PARTISAN DIVIDE

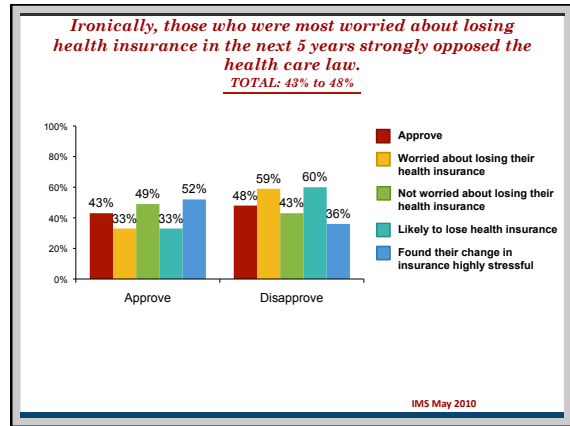
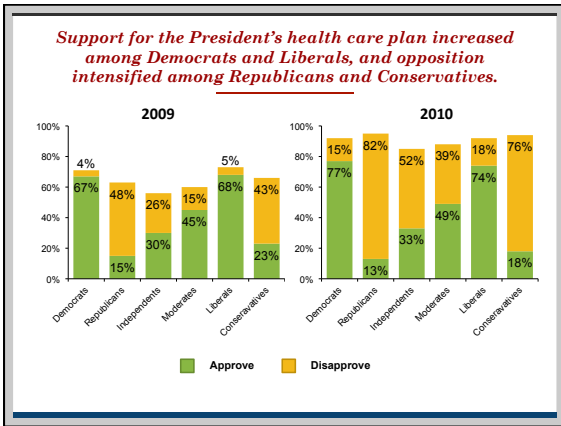
A deep partisan and ideological divide has existed since the earliest moments of the Obama Administration.

FEBRUARY 2009: Conflicting views—driven by partisanship and ideology—about the merits of the Obama Health Care plan (“era of bipartisanship is over”).



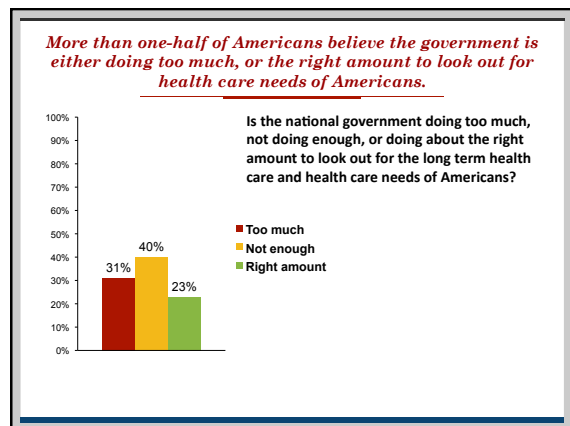
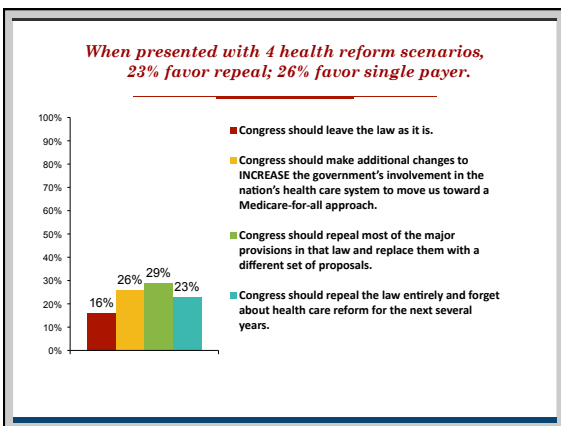
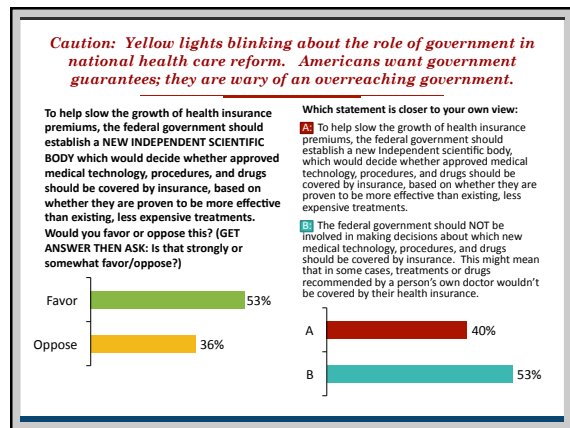
MAY 2010: Conflicting views—driven by partisanship and ideology—about the merits of the Obama Health Care plan: TOTAL 43%-48%. Independents who lean Democratic are basically Democrats. Independents who lean Republican are basically Republicans.





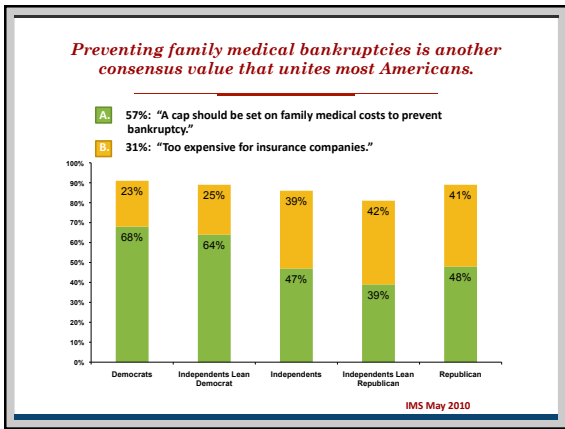
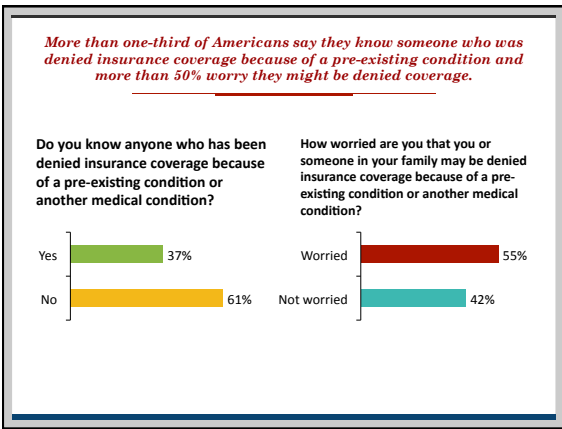
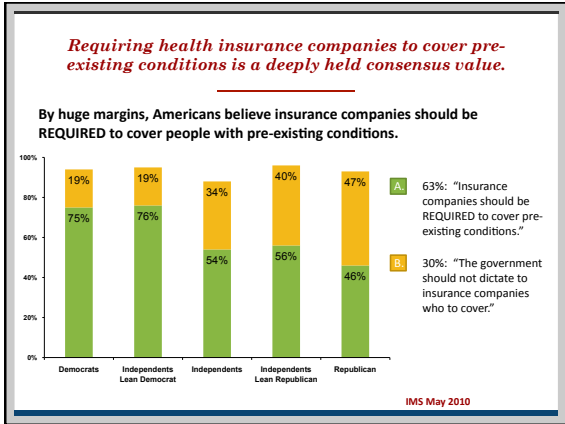
THE ROLE OF GOVERNMENT

Americans want government guarantees/protections for their health care – but they are wary of an overreaching, intrusive government.



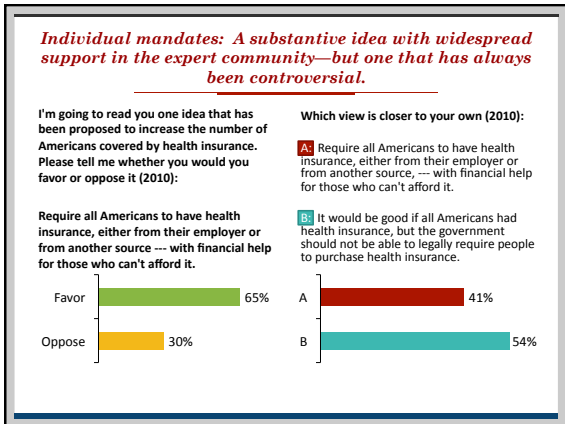
RESEARCH ABOUT VALUES
A Few Examples:

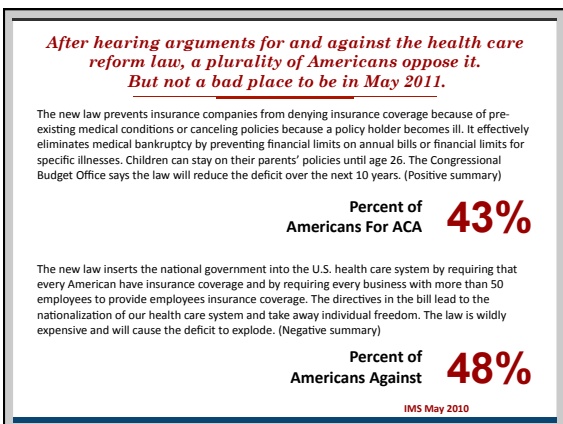
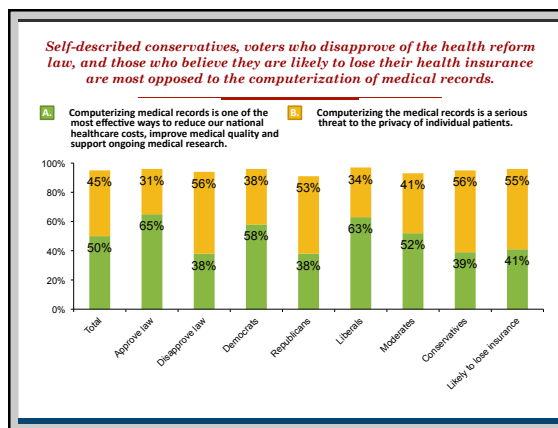
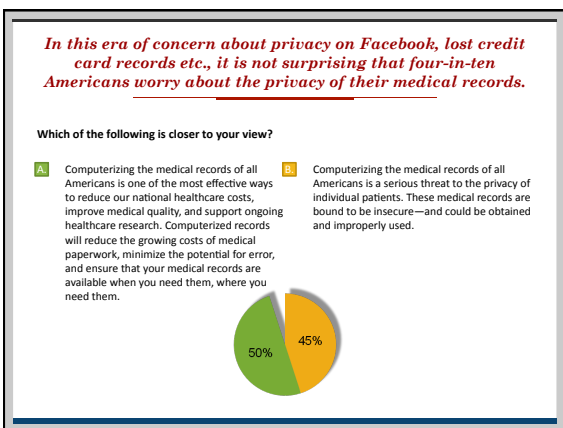
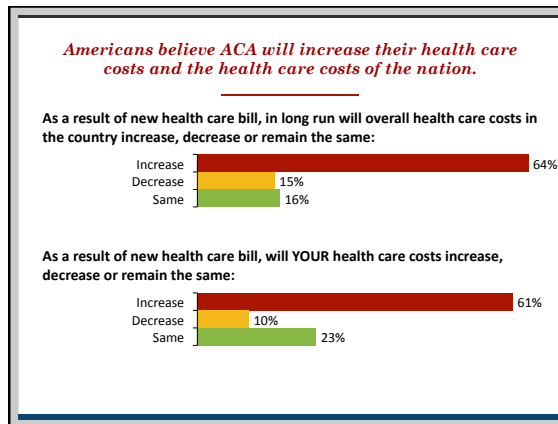
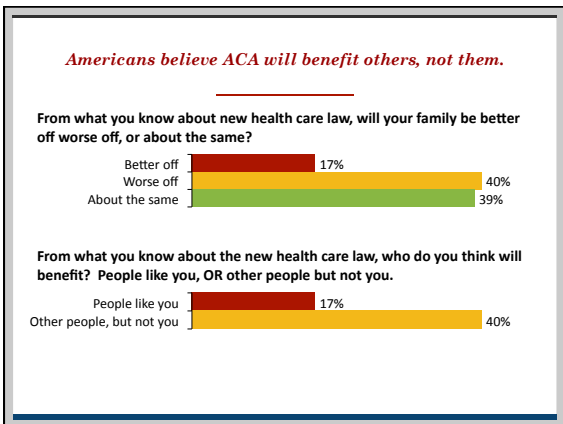
The most effective political/
 public policy communication is
 built upon a platform of values.



PROBLEMS THAT EMERGED IN EARLY RESEARCH:
A Few Examples:

No wishful thinking:





- KEY STRATEGIC RECOMMENDATIONS**
1. A majority of Americans do not/will not understand the substantive details of the Affordable Care Act, or health care policy, generally. It has been ever thus. Given this lack of substantive understanding, a communications campaign based on CORE VALUES about health care is essential.
 2. Americans are surprisingly happy with their CURRENT health care, health insurance coverage, prescription coverage—even their health care costs. They believe ACA will benefit others, not them—and it will increase their own costs. But they do have very real concerns about all aspects of their FUTURE health care. They must be given 3,4,5 understandable benefits they will realize through ACA.
 3. In this regard, many key benefits – that speak to core values – e.g., elimination of medical bankruptcies, end of pre-existing denials, etc – have been underutilized in the public debate over ACA. Opponents of ACA have made their maximum case with “Godzilla the Government” Proponents of ACA have key “values assets” that can/should still be effectively deployed.
 4. Americans want government guarantees on health care; but they are truly wary of an over-reaching government. Proponents of ACA must not engage in wishful thinking about the role of government in health care reform. Stress guarantees/ protections. The Ryan Medicare proposals have created opportunity for strategic clarification on government’s role.

Marttila Strategies

John Marttila is the president of Marttila Strategies. He has more than twenty years of experience measuring American attitudes to a variety of health care issues—and brings a special expertise to understanding American VALUES about health care.

During 2009 and 2010, the company conducted four in-depth national surveys measuring American reaction to the debate about health care reform and other health care topics. This analysis was supported by multiple focus groups in different regions in the country and numerous statewide surveys.

In 2007, the company provided strategic research for the groundbreaking Massachusetts program to provide health insurance coverage to all citizens of the Commonwealth—a program that has been properly described as a model for the national Affordable Care Act.

John Marttila has been a close personal advisor to

Vice President Joe Biden throughout the Vice President's entire career, including during his most recent presidential campaign. This relationship dates back to Biden's first election in 1972 when Marttila's company oversaw the strategy and produced the advertising for the upset victory. Marttila was also a senior advisor to John Kerry's 2004 presidential campaign and Massachusetts Governor Deval Patrick's 2006 campaign.

His company has also worked for many other elected officials and ballot questions throughout the United States — and his company has conducted research and advised political campaigns in Russia, Israel, Hungary and Greece.

National health care clients have included: IMS Health, The Schwartz Center for Compassionate Health Care, PhRMA, The American Cancer Society, The Harvard School of Public Health and the Robert Wood Johnson Foundation.

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