



TO: PhRMA
FR: Morning Consult
DT: April 2023
RE: MRP Survey Results

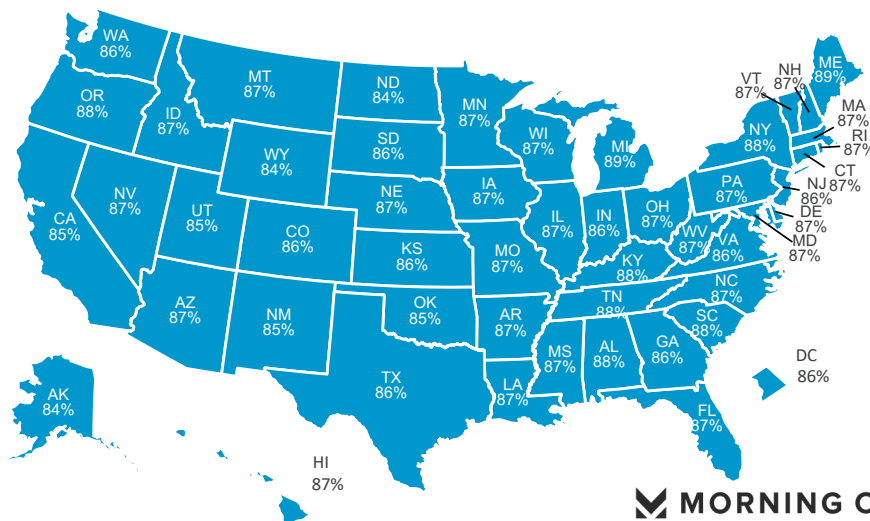
Morning Consult ran a poll, on behalf of PhRMA, focusing on health care issues and potential policy solutions that states could enact to tackle health care cost and affordability challenges. This poll was conducted from March 21 – March 29, 2023, among a national sample of 20,017 adults. The interviews were conducted online.

KEY FINDINGS

- Nearly all adults, across all states, agree that lowering out-of-pocket costs for health care should be a top priority for policymakers.
- Among the most popular solutions to lowering drug prices is ensuring that patients don't pay more for their medicine than their insurance company or their middlemen.
- Three-in-five adults reject government price setting of medicines, such as prescription drug affordability boards, once they learn about tradeoffs.
- Adults across all states express concerns about middlemen, like pharmacy benefit managers, once they learn about their business practices and their impact on patients accessing and affording their prescription medicines.
- Adults value the biopharmaceutical industry and investment in innovation of new medicines and treatments.

DETAILED FINDINGS – HEALTH CARE PRIORITIES

- 86% of adults agree that lowering out-of-pocket costs for health care should be a top priority for policymakers (60% *strongly agree*).
 - Among a list of 11 health care issues presented, out-of-pocket costs such as copays, deductibles, coinsurance and out of-network charges is the most important health care issue for adults (28%).
- *The map below shows total agreement (strongly + somewhat) that lowering out-of-pocket costs should be a top priority for policymakers.*



- 84% of adults agree that policymakers should focus on cracking down on abusive health insurance practices that make it harder to get the care they need (58% *strongly agree*).
- 83% of adults agree that elected officials should ensure health insurance companies and other middlemen are held accountable for their role in keeping patients from medicines they need (56% *strongly agree*).

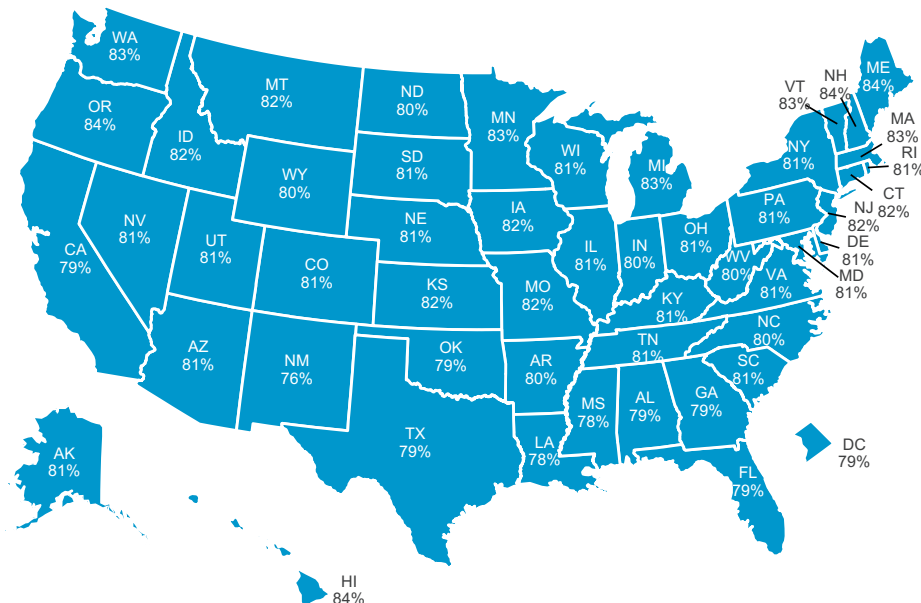
DETAILED FINDINGS – POLICY SOLUTIONS

- When asked about policy solutions that their state could pursue to address prescription drug costs, strong majorities of adults *favor* laws that would require all health insurance plans to cover certain medications used to treat chronic conditions from day one of the plan year (81%) and that would require health insurance companies and their middlemen to pass the rebates and discounts they receive to patients (80%).

Policies to Address Prescription Drug Costs*	Favor – strongly	Favor – not strongly	Total Favor
Require all health insurance plans to cover certain medications used to treat chronic conditions from day one of the plan year, instead of making patients wait until they get through their deductible	60%	21%	81%
Require health insurance companies and their middlemen to pass the rebates and discounts they receive to patients, so no patient has to pay more for their prescription medicines than their insurance company	59%	21%	80%
Require health insurance companies to count patient assistance, such as copay coupons and cost sharing assistance, toward the patient's deductibles	49%	27%	76%
Require health insurance companies to cover medicines from day one by offering at least some health plan options that exclude medicines from deductibles and only charge set copay amounts	47%	29%	76%
Cap the amount of cost sharing, such as deductibles and coinsurance, that patients must pay out-of-pocket to get their medicines	50%	25%	75%

Numbers shown reflect total national sample

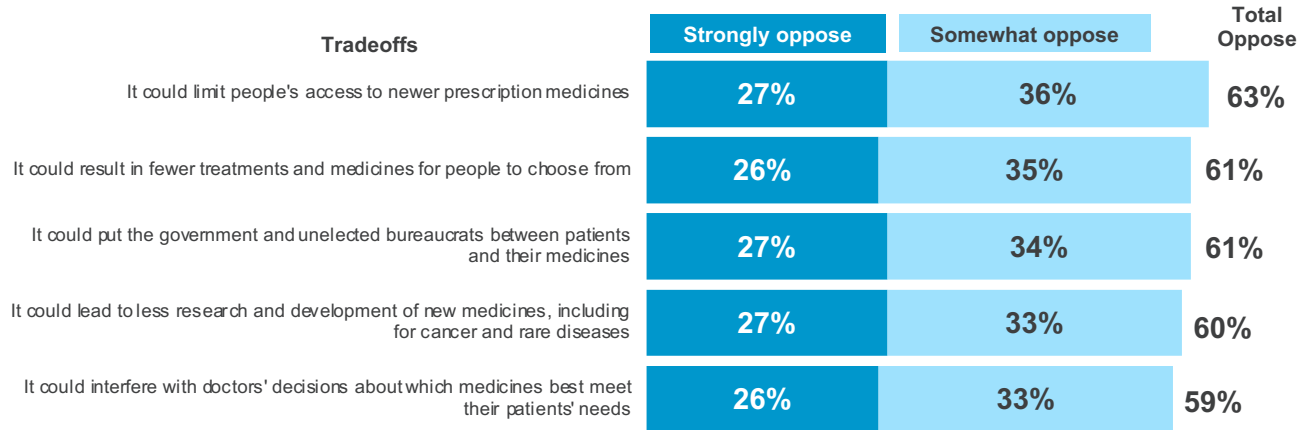
- Across the U.S., strong majorities of adults in all states favor a law that would require that patients don't pay more for their prescription medicine than their insurance company or their middlemen.
- *The map below shows total favor (favor, strongly + favor, not strongly) for a law that would require that patients don't pay more for their prescription medicine than their insurance company or their middlemen.*



*Not all policies tested are shown in policy chart at top of page

DETAILED FINDINGS – POLICY SOLUTIONS CONTINUED

- Three-in-five adults *oppose* drug price setting policies, such as prescription drug affordability boards (PDAB), once they learn more information on the policies and are presented with tradeoffs such as:



Numbers shown reflect total national sample

DETAILED FINDINGS – INDUSTRY AND INVESTMENT IN INNOVATION

- 81% agree that having a strong and innovative pharmaceutical industry in the U.S. is important for discovering future treatments, cures, and vaccines.
- 79% of adults agree we need to encourage pharmaceutical companies to continue investing in research and development by strengthening incentives for creating new medicines and treatments.

Adults express concerns for other actors in the health care industry, such as insurance company middlemen, also called pharmacy benefit managers (PBMs) that impact patients access to prescription medicines.

DETAILED FINDINGS – CONCERN FOR PHARMACY BENEFIT MANAGERS

- When it comes to questions about pharmacy benefit managers (PBMs):
 - 69% find it *very concerning* PBMs "*overcharge for prescription medicines and pocket the difference as profit*"
 - 64% find it *very concerning* PBMs "*deny patients from using tools such as copay coupons, to reduce drug costs*"
 - 63% find it *very concerning* PBMs "*operate with little to no transparency into their pricing or business practices*"
 - 62% find it *very concerning* PBMs "*often steer patients to pharmacies they own so they can make a profit*"
 - 60% find it *very concerning* "*just three PBMs control 80% of the US. prescription drug market*"

National Methodology: This poll was conducted between March 21-March 29, 2023 among a sample of 20,017 Adults. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, gender, race, educational attainment, region, gender by age, and race by educational attainment. Results from the full survey have a margin of error of plus or minus 1 percentage points.

State Methodology: State level findings are based on a model known as multi-level regression with post-stratification (MRP), where strata are based on census data, and results are adjusted to mirror demographics of each state.

*Not all tradeoffs tested are shown