



## PUBLIC POLL FINDINGS AND METHODOLOGY

### United States Pharmacopeial Convention (USP) Physician Study

#### Topline Findings

Washington, DC, February 2, 2022

*These are the findings of an Ipsos poll conducted on behalf of The United States Pharmacopeial Convention (USP) between September 14-30, 2021. For this survey, a sample of 500 healthcare professionals age 18+ from the continental U.S., Alaska, and Hawaii who work at or are affiliated with a hospital system, spend some portion of their time working in a hospital setting, and are board certified was interviewed online in English. The poll has a credibility interval of plus or minus 5.0 percentage points for all respondents.*

For full results, please refer to the following annotated questionnaire:

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#### Screener Questions

S2. Which of the following best describes your primary medical specialty?

	<b>Total (N=500)</b>
Internal Medicine	26%
General Practice or Family Practice	19%
Primary Care	14%
Hematology/Oncology	6%
Oncology	5%
Nephrology	3%
Hematology	*
Other	27%

S4. Are you board certified or board eligible in your primary specialty?

	<b>Total</b>
Board certified	100%
Board eligible	-
Neither	-

S5. In what state are you practicing?

<i>Region:</i>	<b>Total</b>
Northeast	28%
Midwest	23%
South	32%
West	19%





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S5a. In which zip code do you primarily practice medicine?

	<b>Total</b>
Vulnerable population zip code*	44%
Non-vulnerable population zip code	56%

\*Vulnerable populations are defined as those located in zip codes designated as 'Health Professional Shortage Areas' listed [here](#).

S6. How many years have you been in active clinical practice post-residency?

	<b>Total</b>
0-5 years	9%
6-10 years	15%
11-20 years	32%
21-30 years	35%
>30 years	8%

S7. Do you work in or are you affiliated with a hospital system in the U.S.?

	<b>Total</b>
Yes, I work in a hospital system	57%
Yes, I am affiliated with a hospital system	43%
No	-

S8. What percent of your time do you spend at each of the following practice settings?

### Total Mean Summary (Including 0)

	<b>Total</b>
Non-Teaching/Community Hospital	22%
Teaching Hospital (but NOT a Major Academic Medical Center)	21%
Major Academic Medical Center	18%
Private practice, single specialty group	16%
Private practice, multi-specialty group	11%
Private practice, Solo	8%
VA Hospital	2%
Health Maintenance Organization (HMO)	1%
Others	1%

### Total Mean Summary (Excluding 0)

	<b>Total</b>
Private practice, single specialty group	67%
Major Academic Medical Center	65%
Private practice, multi-specialty group	65%
Private practice, Solo	64%
Teaching Hospital (but NOT a Major Academic Medical Center)	55%
Non-Teaching/Community Hospital	49%
Health Maintenance Organization (HMO)	49%
VA Hospital	42%
Others	24%





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### Full Annotated Questionnaire

1. Please indicate how strongly you agree or disagree with the following statements about the healthcare system in the U.S.

#### Total Agree Summary

	<b>Total</b>
Many patients in the U.S. aren't able to afford medications or treatments	88%
The healthcare system in the U.S. is broken	77%
There are other countries with better healthcare systems than the U.S.	71%
The U.S. has the best healthcare system in the world	55%

- a. The U.S. has the best healthcare system in the world

	<b>Total</b>
Strongly agree	19%
Somewhat agree	36%
Somewhat disagree	32%
Strongly disagree	13%
<i>Agree (Net)</i>	<i>55%</i>
<i>Disagree (Net)</i>	<i>45%</i>

- b. There are other countries with better healthcare systems than the U.S.

	<b>Total</b>
Strongly agree	34%
Somewhat agree	37%
Somewhat disagree	21%
Strongly disagree	9%
<i>Agree (Net)</i>	<i>71%</i>
<i>Disagree (Net)</i>	<i>29%</i>

- c. The healthcare system in the U.S. is broken

	<b>Total</b>
Strongly agree	32%
Somewhat agree	45%
Somewhat disagree	18%
Strongly disagree	5%
<i>Agree (Net)</i>	<i>77%</i>
<i>Disagree (Net)</i>	<i>23%</i>



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d. Many patients in the U.S. aren't able to afford medications or treatments

	<b>Total</b>
Strongly agree	49%
Somewhat agree	39%
Somewhat disagree	10%
Strongly disagree	2%
<i>Agree (Net)</i>	<i>88%</i>
<i>Disagree (Net)</i>	<i>12%</i>

2. Please indicate how strongly you agree or disagree with the following statements about the medicine supply chain.

### Total Agree Summary

	<b>Total</b>
The COVID-19 pandemic showed the vulnerabilities of the medicine supply chain	95%
I am concerned that the global medicine supply chain may not be reliable in a time of crisis	90%
Drug shortages have become a bigger problem in recent years	83%
The trust I have in the supply chain to deliver safe, quality medicines is lower today than it has been in the past	73%
I trust that each part of the medicine supply chain has safety protocols in place to ensure the safety of our medicines	72%
I have a good understanding of the medicine supply chain, including how manufacturing and distribution impacts patients	68%
The medicine supply chain is broken	66%

a. I have a good understanding of the medicine supply chain, including how manufacturing and distribution impacts patients

	<b>Total</b>
Strongly agree	18%
Somewhat agree	49%
Somewhat disagree	27%
Strongly disagree	5%
<i>Agree (Net)</i>	<i>68%</i>
<i>Disagree (Net)</i>	<i>32%</i>

b. I trust that each part of the medicine supply chain has safety protocols in place to ensure the safety of our medicines

	<b>Total</b>
Strongly agree	17%
Somewhat agree	54%
Somewhat disagree	24%
Strongly disagree	4%
<i>Agree (Net)</i>	<i>72%</i>
<i>Disagree (Net)</i>	<i>28%</i>





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- c. I am concerned that the global medicine supply chain may not be reliable in a time of crisis

	<b>Total</b>
Strongly agree	41%
Somewhat agree	49%
Somewhat disagree	9%
Strongly disagree	1%
<b>Agree (Net)</b>	<b>90%</b>
<b>Disagree (Net)</b>	<b>10%</b>

- d. The COVID-19 pandemic showed the vulnerabilities of the medicine supply chain

	<b>Total</b>
Strongly agree	57%
Somewhat agree	38%
Somewhat disagree	5%
Strongly disagree	*
<b>Agree (Net)</b>	<b>95%</b>
<b>Disagree (Net)</b>	<b>5%</b>

- e. Drug shortages have become a bigger problem in recent years

	<b>Total</b>
Strongly agree	36%
Somewhat agree	47%
Somewhat disagree	15%
Strongly disagree	2%
<b>Agree (Net)</b>	<b>83%</b>
<b>Disagree (Net)</b>	<b>17%</b>

- f. The trust I have in the supply chain to deliver safe, quality medicines is lower today than it has been in the past

	<b>Total</b>
Strongly agree	21%
Somewhat agree	52%
Somewhat disagree	24%
Strongly disagree	4%
<b>Agree (Net)</b>	<b>73%</b>
<b>Disagree (Net)</b>	<b>27%</b>

- g. The medicine supply chain is broken

	<b>Total</b>
Strongly agree	16%
Somewhat agree	50%
Somewhat disagree	30%
Strongly disagree	4%
<b>Agree (Net)</b>	<b>66%</b>
<b>Disagree (Net)</b>	<b>34%</b>





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3. Please indicate how strongly you agree or disagree with the following statements about how medications are manufactured.

### Total Agree Summary

	<b>Total</b>
The U.S. needs to produce more medicines in the U.S.	90%
We need stronger inspections of drug manufacturing facilities overseas to prevent poor quality products from entering the supply chain	90%
We are too dependent on medicines manufactured in other countries	83%
There are quality issues, inefficiencies and other problems with drug manufacturing	80%
In recent years, there has been an increase in safety issues related to medicines	73%
I have become more concerned in recent years about the quality of medicines	71%

- a. In recent years, there has been an increase in safety issues related to medicines

	<b>Total</b>
Strongly agree	27%
Somewhat agree	46%
Somewhat disagree	25%
Strongly disagree	2%
<i>Agree (Net)</i>	<i>73%</i>
<i>Disagree (Net)</i>	<i>27%</i>

- b. There are quality issues, inefficiencies and other problems with drug manufacturing

	<b>Total</b>
Strongly agree	27%
Somewhat agree	53%
Somewhat disagree	18%
Strongly disagree	2%
<i>Agree (Net)</i>	<i>80%</i>
<i>Disagree (Net)</i>	<i>20%</i>

- c. The U.S. needs to produce more medicines in the U.S.

	<b>Total</b>
Strongly agree	55%
Somewhat agree	35%
Somewhat disagree	9%
Strongly disagree	1%
<i>Agree (Net)</i>	<i>90%</i>
<i>Disagree (Net)</i>	<i>10%</i>

- d. I have become more concerned in recent years about the quality of medicines

	<b>Total</b>
Strongly agree	24%
Somewhat agree	46%
Somewhat disagree	26%
Strongly disagree	4%
<i>Agree (Net)</i>	<i>71%</i>
<i>Disagree (Net)</i>	<i>29%</i>





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- e. We are too dependent on medicines manufactured in other countries

	<b>Total</b>
Strongly agree	42%
Somewhat agree	41%
Somewhat disagree	15%
Strongly disagree	2%
<i>Agree (Net)</i>	<i>83%</i>
<i>Disagree (Net)</i>	<i>17%</i>

- f. We need stronger inspections of drug manufacturing facilities overseas to prevent poor quality products from entering the supply chain

	<b>Total</b>
Strongly agree	44%
Somewhat agree	46%
Somewhat disagree	9%
Strongly disagree	1%
<i>Agree (Net)</i>	<i>90%</i>
<i>Disagree (Net)</i>	<i>10%</i>

4. In your opinion, which of the following are the biggest contributing factors to possible medicine shortages in the U.S.? Please select up to 5 options.

	<b>Total</b>
Significant reliance on other countries for medicines	62%
The COVID-19 pandemic	55%
Not enough companies making the needed medicines	54%
Drug quality and safety issues	40%
Patent protection of medicines	30%
Political tension between countries	29%
Lack of reliable information across the supply chain	28%
Availability of raw materials	26%
Misinformation about the use of medications	25%
Misuse of medications	24%
Drug recalls	22%
Natural disasters	20%
Prices are too low for some essential medicines	11%
Other	3%
None of these	-
Not sure	1%



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5. In your opinion, how accountable should each of the following entities be when it comes to maintaining the medical supply chain's resilience?

### Total Accountable Summary

	<b>Total</b>
The U.S. federal government (elected or appointed officials and government agencies)	92%
Pharmaceutical companies	92%
Pharmaceutical wholesalers and distributors	91%
Organizations that set standards for medicine manufacturing	89%
International governments where medicines are manufactured	83%
International governments that are reliant on medicines for the citizens	79%
Payors/health insurance companies	79%
Local/state governments in the U.S.	75%
The World Health Organization (WHO)	67%

- a. The World Health Organization (WHO)

	<b>Total</b>
Very accountable	26%
Somewhat accountable	40%
Not very accountable	26%
Not accountable at all	7%
<i>Accountable (Net)</i>	<i>67%</i>
<i>Not accountable (Net)</i>	<i>33%</i>

- b. The U.S. federal government (elected or appointed officials and government agencies)

	<b>Total</b>
Very accountable	59%
Somewhat accountable	33%
Not very accountable	6%
Not accountable at all	2%
<i>Accountable (Net)</i>	<i>92%</i>
<i>Not accountable (Net)</i>	<i>8%</i>

- c. Local/state governments in the U.S.

	<b>Total</b>
Very accountable	28%
Somewhat accountable	47%
Not very accountable	22%
Not accountable at all	4%
<i>Accountable (Net)</i>	<i>75%</i>
<i>Not accountable (Net)</i>	<i>25%</i>

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d. International governments where medicines are manufactured

	<b>Total</b>
Very accountable	42%
Somewhat accountable	41%
Not very accountable	14%
Not accountable at all	3%
<b>Accountable (Net)</b>	<b>83%</b>
<b>Not accountable (Net)</b>	<b>17%</b>

e. International governments that are reliant on medicines for the citizens

	<b>Total</b>
Very accountable	31%
Somewhat accountable	48%
Not very accountable	18%
Not accountable at all	2%
<b>Accountable (Net)</b>	<b>79%</b>
<b>Not accountable (Net)</b>	<b>21%</b>

f. Pharmaceutical companies

	<b>Total</b>
Very accountable	65%
Somewhat accountable	27%
Not very accountable	7%
Not accountable at all	1%
<b>Accountable (Net)</b>	<b>92%</b>
<b>Not accountable (Net)</b>	<b>8%</b>

g. Organizations that set standards for medicine manufacturing

	<b>Total</b>
Very accountable	48%
Somewhat accountable	41%
Not very accountable	10%
Not accountable at all	*
<b>Accountable (Net)</b>	<b>89%</b>
<b>Not accountable (Net)</b>	<b>11%</b>

h. Pharmaceutical wholesalers and distributors

	<b>Total</b>
Very accountable	53%
Somewhat accountable	38%
Not very accountable	8%
Not accountable at all	1%
<b>Accountable (Net)</b>	<b>91%</b>
<b>Not accountable (Net)</b>	<b>9%</b>

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i. Payors/health insurance companies

	<b>Total</b>
Very accountable	34%
Somewhat accountable	45%
Not very accountable	17%
Not accountable at all	4%
<b>Accountable (Net)</b>	<b>79%</b>
<b>Not accountable (Net)</b>	<b>21%</b>

6. In the past 18 months, during the COVID-19 pandemic, were you aware of shortages of medications needed by your patients or patients of your colleagues (COVID-19 or non-COVID-19 related medications)?

	<b>Total</b>
Yes	78%
No	14%
I'm not sure	9%

7. In the past 18 months, during the COVID-19 pandemic, how frequently was your health facility facing a potential shortage of medications (COVID-19 or non-COVID-19 related medications)?

	<b>Total</b>
Often	23%
Sometimes	57%
Rarely	18%
Never	2%
<b>Often/sometimes (Net)</b>	<b>80%</b>
<b>Rarely/never (Net)</b>	<b>20%</b>

8. **[Ask if Q6 = Yes OR Q7 = Often OR Sometimes]** In times when your facility faced a potential shortage of medication over the past 18 months, which of the following steps were taken? Please select all that apply.

	<b>Total (N=432)</b>
Prescribe your second choice medication	73%
Not prescribe certain medicines	52%
Warn patients about potential limits to availability of drugs	48%
Limit prescriptions to only drugs absolutely necessary	41%
Cancellation of elective procedures	40%
Rationing treatments to the most severely ill patients	39%
Delay treatments	29%
Prescribe the medication knowing that it might not be immediately available	29%
Recommend to patients non-drug, other therapies	27%
Prescribe the medication knowing that it might not be available later	22%
Refer the patient to another provider and/or hospital system	12%
Increase a patient's prescription so they could stock up	11%
Decline care to a patient	6%
Other	-



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9. In the past 18 months, how frequently have patients at your facility had negative outcomes as a result of a shortage of specific medications?

	<b>Total</b>
Often	4%
Sometimes	28%
Rarely	43%
Never	24%
<i>Often/sometimes (Net)</i>	<i>33%</i>
<i>Rarely/never (Net)</i>	<i>67%</i>

10. At the height of the pandemic, did patients come to you and ask your advice about potential treatments for COVID-19 that were mentioned in the news media, on the internet, or on social media?

	<b>Total</b>
Yes	89%
No	11%

11. How serious, if at all, do you think the threat of misinformation on the internet and in the news media is to your patients?

	<b>Total</b>
Very serious	75%
Somewhat serious	21%
Not very serious	3%
Not at all serious	1%
<i>Serious (Net)</i>	<i>96%</i>
<i>Not serious (Net)</i>	<i>4%</i>

12. Please indicate how strongly you agree or disagree with the following statements.

### Total Agree Summary

	<b>Total</b>
Misinformation on the internet, social media, and the news media makes it more difficult to treat my patients	94%
Some patients of mine are more likely to believe what they hear in the news or on the internet than what they hear from their doctors	90%
With the increase of misinformation about COVID-19 treatments it's been difficult to get patients to trust the medical advice I am giving them	87%
I had to treat patients because they tried unproven treatments (e.g. hydroxychloroquine) that they heard about in the news or on the internet	43%



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- a. Misinformation on the internet, social media, and the news media makes it more difficult to treat my patients

	<b>Total</b>
Strongly agree	66%
Somewhat agree	28%
Somewhat disagree	5%
Strongly disagree	1%
<i>Agree (Net)</i>	<i>94%</i>
<i>Disagree (Net)</i>	<i>6%</i>

- b. I had to treat patients because they tried unproven treatments (e.g. hydroxychloroquine) that they heard about in the news or on the internet

	<b>Total</b>
Strongly agree	16%
Somewhat agree	27%
Somewhat disagree	29%
Strongly disagree	28%
<i>Agree (Net)</i>	<i>43%</i>
<i>Disagree (Net)</i>	<i>57%</i>

- c. Some patients of mine are more likely to believe what they hear in the news or on the internet than what they hear from their doctors

	<b>Total</b>
Strongly agree	52%
Somewhat agree	38%
Somewhat disagree	8%
Strongly disagree	1%
<i>Agree (Net)</i>	<i>90%</i>
<i>Disagree (Net)</i>	<i>10%</i>

- d. With the increase of misinformation about COVID-19 treatments it's been difficult to get patients to trust the medical advice I am giving them

	<b>Total</b>
Strongly agree	46%
Somewhat agree	41%
Somewhat disagree	11%
Strongly disagree	2%
<i>Agree (Net)</i>	<i>87%</i>
<i>Disagree (Net)</i>	<i>13%</i>

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13. If the medicine supply chain were a patient, which of the following classifications would you say best match “the patient”?

	<b>Total</b>
<b>Outpatient...</b> looking good, maybe just the occasional checkup!	9%
<b>Ready for Discharge...</b> supervised care was necessary but you can probably go home now.	30%
<b>ER/ICU...</b> serious, significant urgent care required	53%
<b>Coding...</b> time for the crash cart	7%
<b>DOA...</b> too late to make any significant progress	1%

14. How confident are you that the medicine supply chain is resilient enough to withstand the following occurrences so that patients continue getting the medicines they need when they need them?

### Total Confident Summary

	<b>Total</b>
Political unrest in the U.S.	55%
Natural disasters in the U.S.	52%
Trade disputes	42%
Political unrest in countries where medicines are manufactured	31%
The next pandemic	31%
Natural disasters in countries where medicines are manufactured	29%

- a. Natural disasters in the U.S.

	<b>Total</b>
Very confident	8%
Somewhat confident	44%
Not very confident	37%
Not confident at all	10%
<b>Confident (Net)</b>	<b>52%</b>
<b>Not confident (Net)</b>	<b>48%</b>

- b. Natural disasters in countries where medicines are manufactured

	<b>Total</b>
Very confident	3%
Somewhat confident	26%
Not very confident	52%
Not confident at all	19%
<b>Confident (Net)</b>	<b>29%</b>
<b>Not confident (Net)</b>	<b>71%</b>

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c. Political unrest in the U.S.

	<b>Total</b>
Very confident	10%
Somewhat confident	45%
Not very confident	32%
Not confident at all	13%
<i>Confident (Net)</i>	<i>55%</i>
<i>Not confident (Net)</i>	<i>45%</i>

d. Political unrest in countries where medicines are manufactured

	<b>Total</b>
Very confident	3%
Somewhat confident	28%
Not very confident	51%
Not confident at all	18%
<i>Confident (Net)</i>	<i>31%</i>
<i>Not confident (Net)</i>	<i>69%</i>

e. Trade disputes

	<b>Total</b>
Very confident	4%
Somewhat confident	38%
Not very confident	49%
Not confident at all	10%
<i>Confident (Net)</i>	<i>42%</i>
<i>Not confident (Net)</i>	<i>58%</i>

f. The next pandemic

	<b>Total</b>
Very confident	4%
Somewhat confident	27%
Not very confident	51%
Not confident at all	18%
<i>Confident (Net)</i>	<i>31%</i>
<i>Not confident (Net)</i>	<i>69%</i>



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15. Which of the following steps, if any, have you seen, read, or heard about the U.S. taking in order to stabilize the medical supply chain? Please select all that apply.

	<b>Total</b>
Bringing back some drug manufacturing to the U.S.	56%
Building up the national stockpile of essential medicines	53%
Boosting local production of medicines in other international markets (beyond China and India)	39%
Promoting research and development that establishes innovative manufacturing processes and production technologies to strengthen supply chain resilience	39%
Fostering international cooperation to distribute or produce medicines	33%
Creating robust quality management maturity to ensure consistent and reliable drug manufacturing and quality performance	28%
Leveraging data to improve supply chain resilience	26%
Other	*
None of the above	14%



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### About the Study

These are the findings of an Ipsos poll conducted on behalf of The United States Pharmacopeial Convention (USP) between September 14-30, 2021. For this survey, a sample of 500 healthcare professionals age 18+ from the continental U.S., Alaska, and Hawaii who work at or are affiliated with a hospital system, spend some portion of their time working in a hospital setting, and are board certified was interviewed online in English.

The sample was randomly drawn from online panel sources that specialize in recruiting physicians and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. The sample drawn for this study reflects fixed sample targets on physician type (primary care physician vs. specialists or surgeons). To qualify, physicians must be board certified and affiliated with a hospital system or spend a portion of their time working in a hospital. No posthoc demographic weights were applied to the sample.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 5.0 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=500, DEFF=1.5, adjusted Confidence Interval=+/-6.5 percentage points).

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