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PhRMA/Ipsos Tracking Survey, Q2 2022

Conducted by Ipsos using KnowledgePanel®
Q2 2022: Interview dates: May 13 – May 17, 2022. Number of interviews: 2,514

Margin of error: +/-2.3 percentage points at the 95% confidence level

NOTE: All results show percentages among all respondents, unless otherwise labeled. Reduced bases are unweighted values. NOTE: * = less than 0.5%, - = no respondents

Annotated Questionnaire:

1. Which of the following issues, if any, do you think is the most important issue that needs to be addressed in the United States?

Most Important Issue

	Total
Inflation/rising cost of goods	33%
The environment or climate change	10%
The economy/jobs	8%
Health insurance costs and coverage	8%
Immigration and border security	7%
Race relations / racial discrimination	6%
The coronavirus (COVID-19)	5%
Crime	5%
National security and terrorism	4%
Education	4%
Prescription drug prices	2%
Taxes	2%
Foreign policy	1%
Illegal drug use	1%
None of these issues	-
Skipped	-



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Second Most Important Issue

	Total
Inflation/rising cost of goods	16%
Immigration and border security	12%
Health insurance costs and coverage	10%
The economy/jobs	8%
The environment or climate change	8%
Crime	7%
Race relations / racial discrimination	7%
The coronavirus (COVID-19)	5%
Education	4%
Taxes	4%
National security and terrorism	3%
Prescription drug prices	3%
Foreign policy	3%
Illegal drug use	2%
None of these issues	-
Skipped	-

2. How would you rate your current financial situation? Please select only one response

	Total
Poor	12%
Fair	31%
Good	42%
Excellent	12%
Don't know	2%
<i>Fair/poor (net)</i>	<i>43%</i>
<i>Excellent/good (net)</i>	<i>54%</i>

4. In the past three months, have you noticed any changes in the price or cost of any of the following?

a. Groceries

	Total
Higher prices or cost	91%
About the same	5%
Lower prices or cost	1%
Not applicable/Have not purchased this in the last 3 months	2%
Refused	1%



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b. Gasoline (e.g., gas for your car)

	Total
Higher prices or cost	93%
About the same	2%
Lower prices or cost	*
Not applicable/Have not purchased this in the last 3 months	4%
Refused	1%

c. Utilities

	Total
Higher prices or cost	57%
About the same	34%
Lower prices or cost	1%
Not applicable/Have not purchased this in the last 3 months	7%
Refused	1%

d. Rent

	Total
Higher prices or cost	36%
About the same	17%
Lower prices or cost	*
Not applicable/Have not purchased this in the last 3 months	46%
Refused	1%

e. Buying a new home

	Total
Higher prices or cost	46%
About the same	3%
Lower prices or cost	1%
Not applicable/Have not purchased this in the last 3 months	50%
Refused	1%



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f. Buying a car

	Total
Higher prices or cost	46%
About the same	5%
Lower prices or cost	*
Not applicable/Have not purchased this in the last 3 months	48%
Refused	1%

g. Eating out at restaurants or take out

	Total
Higher prices or cost	77%
About the same	15%
Lower prices or cost	1%
Not applicable/Have not purchased this in the last 3 months	7%
Refused	1%

h. Home or auto insurance

	Total
Higher prices or cost	37%
About the same	41%
Lower prices or cost	2%
Not applicable/Have not purchased this in the last 3 months	21%
Refused	1%

i. Prescription medicines

	Total
Higher prices or cost	28%
About the same	44%
Lower prices or cost	1%
Not applicable/Have not purchased this in the last 3 months	26%
Refused	1%



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j. Doctor's office visits, lab tests, or other health care services

	Total
Higher prices or cost	24%
About the same	47%
Lower prices or cost	1%
Not applicable/Have not purchased this in the last 3 months	27%
Refused	1%

5. How concerned, if at all, are you about inflation?

	Total
Very concerned	66%
Somewhat concerned	26%
Not very concerned	4%
Not at all concerned	1%
Not Sure	2%
Refused	1%
<i>Very/somewhat concerned (net)</i>	<i>92%</i>
<i>Not very/not at all concerned (net)</i>	<i>5%</i>

6. To what extent do you approve or disapprove of the way policymakers are handling the issue of inflation?

	Total
Strongly approve	2%
Somewhat approve	14%
Somewhat disapprove	22%
Strongly disapprove	44%
Not Sure	18%
Refused	1%
<i>Approve (net)</i>	<i>16%</i>
<i>Disapprove (net)</i>	<i>66%</i>



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7. How concerned, if at all, are you about your ability to afford the following?

a. Out-of-pocket health care costs (copays, deductibles, etc.)

	Total
Very concerned	29%
Somewhat concerned	28%
Not very concerned	20%
Not at all concerned	13%
Does not apply to me	10%
Refused	1%
<i>Very/somewhat concerned (net)</i>	<i>57%</i>
<i>Not very/not at all concerned (net)</i>	<i>33%</i>

b. Your prescription medicines

	Total
Very concerned	20%
Somewhat concerned	21%
Not very concerned	23%
Not at all concerned	17%
Does not apply to me	19%
Refused	1%
<i>Very/somewhat concerned (net)</i>	<i>41%</i>
<i>Not very/not at all concerned (net)</i>	<i>40%</i>

c. Your monthly groceries

	Total
Very concerned	39%
Somewhat concerned	29%
Not very concerned	15%
Not at all concerned	12%
Does not apply to me	3%
Refused	1%
<i>Very/somewhat concerned (net)</i>	<i>82%</i>
<i>Not very/not at all concerned (net)</i>	<i>13%</i>



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d. Your electric bill

	Total
Very concerned	27%
Somewhat concerned	30%
Not very concerned	20%
Not at all concerned	15%
Does not apply to me	7%
Refused	1%
<i>Very/somewhat concerned (net)</i>	<i>57%</i>
<i>Not very/not at all concerned (net)</i>	<i>35%</i>

e. Your childcare

	Total
Very concerned	9%
Somewhat concerned	6%
Not very concerned	4%
Not at all concerned	9%
Does not apply to me	72%
Refused	1%
<i>Very/somewhat concerned (net)</i>	<i>15%</i>
<i>Not very/not at all concerned (net)</i>	<i>13%</i>

f. Your transportation (e.g., gas, public transportation)

	Total
Very concerned	42%
Somewhat concerned	26%
Not very concerned	15%
Not at all concerned	13%
Does not apply to me	4%
Refused	1%
<i>Very/somewhat concerned (net)</i>	<i>68%</i>
<i>Not very/not at all concerned (net)</i>	<i>28%</i>



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g. New clothing or accessories

	Total
Very concerned	15%
Somewhat concerned	30%
Not very concerned	29%
Not at all concerned	20%
Does not apply to me	5%
Refused	1%
<i>Very/somewhat concerned (net)</i>	<i>45%</i>
<i>Not very/not at all concerned (net)</i>	<i>49%</i>

8. Which of the following comes closest to describing your situation with respect to out-of-pocket health care costs...

	Total
My out-of-pocket costs are inexpensive and I consider it a bargain. I'm confident that if I had a major medical event or was diagnosed with a chronic illness today I would be able to cover my out-of-pocket expenses without any difficulty	19%
My out-of-pocket costs are affordable. I'm not too confident that if I had a major medical event or was diagnosed with a chronic illness today I would be able to cover my out-of-pocket expenses without much difficulty	29%
My out-of-pocket costs are expensive, but in the event I had a major medical event or was diagnosed with a chronic illness today I would be able to cover them with savings or credit cards	24%
My out-of-pocket costs are more than I could afford if I had a major medical event or was diagnosed with a chronic illness today. Even though I have insurance I would not be able to afford to get health care if I were to be seriously ill	24%

9. Please indicate whether you agree or disagree with the following:

- a. Health insurers intentionally make coverage benefits complicated so they can increase their bottom line

	Total
Strongly agree	30%
Somewhat agree	36%
Somewhat disagree	12%
Strongly disagree	4%
Not Sure	18%
Refused	1%
<i>Agree (net)</i>	<i>66%</i>
<i>Disagree (net)</i>	<i>16%</i>



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- b. Health insurance coverage is difficult to understand for the average American

	Total
Strongly agree	36%
Somewhat agree	45%
Somewhat disagree	10%
Strongly disagree	3%
Not Sure	6%
Refused	1%
<i>Agree (net)</i>	<i>81%</i>
<i>Disagree (net)</i>	<i>13%</i>

- c. I feel like I understand what is covered by my health insurance

	Total
Strongly agree	17%
Somewhat agree	48%
Somewhat disagree	18%
Strongly disagree	10%
Not Sure	7%
Refused	1%
<i>Agree (net)</i>	<i>65%</i>
<i>Disagree (net)</i>	<i>28%</i>

- d. In the event of a major medical event or emergency, I am afraid my insurance would not cover my medical needs

	Total
Strongly agree	18%
Somewhat agree	28%
Somewhat disagree	27%
Strongly disagree	16%
Not Sure	10%
Refused	1%
<i>Agree (net)</i>	<i>46%</i>
<i>Disagree (net)</i>	<i>43%</i>

10. If you had to pick between one of the following options, which would you choose?

	Total
A health insurance plan where I pay a slightly higher premium each month but pay less when I go to the doctor or fill a prescription	61%
A health insurance plan where I pay a slightly lower premium each month but pay more when I go to the doctor or fill a prescription	38%
Skipped	1%



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11. When it comes to reducing the cost of health care, which is closer to your view?

	Total
Congress should focus more on reducing patients' overall out-of-pocket health care costs, such as deductibles, copays, and coinsurance	69%
Congress should focus more on reducing the costs of prescription drugs.	31%
Skipped	1%

12. To what extent do you agree or disagree with the following statements?

a. Lowering out-of-pocket costs for health care should be a top priority for Washington

	Total
Strongly agree	40%
Somewhat agree	39%
Somewhat disagree	9%
Strongly disagree	4%
Don't know	7%
Skipped	1%
<i>Agree (net)</i>	<i>79%</i>
<i>Disagree (net)</i>	<i>13%</i>

b. America needs to be better prepared for the next pandemic

	Total
Strongly agree	54%
Somewhat agree	26%
Somewhat disagree	9%
Strongly disagree	4%
Don't know	7%
Skipped	1%
<i>Agree (net)</i>	<i>80%</i>
<i>Disagree (net)</i>	<i>12%</i>

c. Congress should focus on cracking down on abusive health insurance practices that make it harder to get the care we need

	Total
Strongly agree	54%
Somewhat agree	31%
Somewhat disagree	4%
Strongly disagree	3%
Don't know	8%
Skipped	1%
<i>Agree (net)</i>	<i>85%</i>
<i>Disagree (net)</i>	<i>7%</i>

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d. Politicians have lost touch with what the public needs from their health care

	Total
Strongly agree	59%
Somewhat agree	27%
Somewhat disagree	4%
Strongly disagree	2%
Don't know	7%
Skipped	1%
<i>Agree (net)</i>	86%
<i>Disagree (net)</i>	6%

e. The health insurance and health care system is too complicated

	Total
Strongly agree	42%
Somewhat agree	41%
Somewhat disagree	9%
Strongly disagree	3%
Don't know	6%
Skipped	1%
<i>Agree (net)</i>	82%
<i>Disagree (net)</i>	11%

f. There is too much waste, fraud and administrative overhead in the health care system, it is driving up the cost I pay for care

	Total
Strongly agree	50%
Somewhat agree	31%
Somewhat disagree	5%
Strongly disagree	2%
Don't know	11%
Skipped	1%
<i>Agree (net)</i>	81%
<i>Disagree (net)</i>	7%



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19. To what extent do you agree or disagree with the following statement?

I am worried that there will be more superbugs in the near future and our country must continue to invest in science to combat the next pandemic.

	Total
Strongly agree	32%
Somewhat agree	35%
Somewhat disagree	13%
Strongly disagree	9%
Don't know	11%
Skipped	1%
<i>Agree (net)</i>	<i>67%</i>
<i>Disagree (net)</i>	<i>21%</i>

20. When you think about priorities in public health, how high of a priority would you put on developing new antibiotics to combat resistant bacteria also known as “superbugs”?

	Total
A top priority	15%
A high priority	34%
Somewhat of a priority	31%
Not much of a priority	9%
Not a priority at all	3%
Not sure	9%
Refused	1%

13. Below are some different ideas people have raised as ways to lower the cost of health care in this country. Do you support or oppose having the federal government...?

- a. Require health insurance companies to be more transparent about what medicines are covered and what patients will pay out-of-pocket for prescription medicines

	Total
Support	87%
Oppose	2%
No opinion	10%
Skipped	1%

- b. Ensure more predictability in health care so that people know how much they will pay for things like prescription medicines every month

	Total
Support	84%
Oppose	3%
No opinion	13%
Skipped	1%



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- c. Place a cap on the amount health insurers can make patients pay for their deductibles, copays and other out-of-pocket costs

	Total
Support	76%
Oppose	7%
No opinion	16%
Skipped	1%

- d. Require health insurers and pharmacy benefit managers (also known as PBMs) to share more of the rebates and discounts they receive directly with patients so they pay less for their medicines

	Total
Support	81%
Oppose	3%
No opinion	16%
Skipped	1%

- e. Require hospitals to use more of the discounts they receive on prescription medicines to help patients in need instead of using those discounts for other purposes

	Total
Support	77%
Oppose	5%
No opinion	18%
Skipped	1%

- f. Require hospitals and clinics to be more transparent about how much they mark-up the costs of prescription medicines

	Total
Support	86%
Oppose	3%
No opinion	11%
Skipped	1%



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- g. Require pharmaceutical companies to be more transparent and open about medicine costs

	Total
Support	87%
Oppose	3%
No opinion	10%
Skipped	1%

- h. Set the increase and decrease of the cost of prescription drugs to the rate of inflation

	Total
Support	38%
Oppose	27%
No opinion	33%
Skipped	1%

14. Below are some policies that your elected officials could pursue to address prescription drug costs. For each one, please indicate whether you favor or oppose a state law that would do the following...

- a. Establish a government board to set prices for prescription medicines

	Total
Strongly favor	24%
Somewhat favor	31%
Somewhat oppose	13%
Strongly oppose	12%
Don't know/no opinion	19%
Refused	1%

- b. Allow state governments to import non-FDA approved medicines from other countries

	Total
Strongly favor	15%
Somewhat favor	26%
Somewhat oppose	21%
Strongly oppose	15%
Don't know/no opinion	22%
Refused	1%



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c. Require health insurance companies and pharmacy benefit managers (PBMs) to pass along rebates and discounts they receive on medicines so that patients pay at the pharmacy

	Total
Strongly favor	47%
Somewhat favor	30%
Somewhat oppose	3%
Strongly oppose	2%
Don't know/no opinion	17%
Refused	1%

d. Require health insurance companies to count patient assistance, such as co-pay coupons, toward the patient's deductible and out-of-pocket maximums

	Total
Strongly favor	40%
Somewhat favor	31%
Somewhat oppose	4%
Strongly oppose	2%
Don't know/no opinion	22%
Refused	1%

e. Require health insurance companies to cover medicines from day one before a patient has met their deductible

	Total
Strongly favor	46%
Somewhat favor	28%
Somewhat oppose	7%
Strongly oppose	3%
Don't know/no opinion	16%
Refused	1%

f. Require all health insurance plans to cover certain medications used to treat chronic conditions before a patient has met their deductible

	Total
Strongly favor	49%
Somewhat favor	28%
Somewhat oppose	5%
Strongly oppose	2%
Don't know/no opinion	15%
Refused	1%



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g. Cap the cost sharing, such as deductibles and coinsurance, that patients must pay out-of-pocket to get their medicines

	Total
Strongly favor	42%
Somewhat favor	29%
Somewhat oppose	7%
Strongly oppose	3%
Don't know/no opinion	19%
Refused	1%

h. Ensure patients' out-of-pocket costs for medicines are based on the negotiated price paid by health insurance companies and pharmacy benefits managers (PBMs) instead of the undiscounted "sticker price" of medicines.

	Total
Strongly favor	45%
Somewhat favor	29%
Somewhat oppose	3%
Strongly oppose	2%
Don't know/no opinion	20%
Refused	1%

15. Do you agree or disagree with each of the following statements?

- a. Health insurance companies are increasingly using high deductibles, and coinsurance that make it more expensive for patients to get the care patients need

	Total
Agree	71%
Disagree	6%
No Opinion	22%
Refused	1%

- b. Health insurance companies and middlemen, like pharmacy benefit managers (also known as PBMs), increase the costs for patients

	Total
Agree	71%
Disagree	7%
No Opinion	21%
Refused	1%



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- c. Health insurance companies are posting record breaking profits at the expense of too many patients

	Total
Agree	71%
Disagree	6%
No Opinion	22%
Refused	1%

- d. Health insurance companies are negotiating for themselves – not patients

	Total
Agree	80%
Disagree	5%
No Opinion	15%
Refused	1%

16. How familiar are you with pharmacy benefit managers, sometimes called “PBMs”?

	Total
Very familiar	2%
Somewhat familiar	9%
Not very familiar	27%
I have heard of it, but that's it	15%
I have never heard of it	46%
Refused	1%

17. Based on what you know, how would you rate pharmacy benefit managers (PBMs) performance in keeping prescription drug costs low?

	Total
Very good	2%
Somewhat good	11%
Somewhat bad	25%
Very bad	25%
Don't know/no opinion	36%
Refused	1%
<i>Good (net)</i>	<i>13%</i>
<i>Bad (net)</i>	<i>50%</i>



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18. How concerning, if at all, are each of the following statements about pharmacy benefit managers (PBMs)?

- a. Just three PBMs now control 80% of the market

	Total
Very concerning	62%
Somewhat concerning	15%
Not too concerning	3%
Not at all concerning	1%
Don't know/no opinion	19%
Refused	1%
<i>Concerning (net)</i>	<i>77%</i>
<i>Not Concerning (net)</i>	<i>4%</i>

- b. PBMs are administrators, not doctors, but they determine what medicine are covered by your insurance and what you pay for them

	Total
Very concerning	59%
Somewhat concerning	18%
Not too concerning	3%
Not at all concerning	1%
Don't know/no opinion	18%
Refused	1%
<i>Concerning (net)</i>	<i>77%</i>
<i>Not Concerning (net)</i>	<i>4%</i>

- c. The top three PBMs all own or are owned by health insurance companies that are in the top 15 of the Fortune 500 list

	Total
Very concerning	56%
Somewhat concerning	17%
Not too concerning	4%
Not at all concerning	1%
Don't know/no opinion	20%
Refused	1%
<i>Concerning (net)</i>	<i>73%</i>
<i>Not Concerning (net)</i>	<i>5%</i>



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- d. PBMs and payers receive tens of billions of dollars in rebates and discounts from prescription drug manufacturers, but patients often do not benefit from these savings at the pharmacy counter

	Total
Very concerning	63%
Somewhat concerning	15%
Not too concerning	2%
Not at all concerning	1%
Don't know/no opinion	18%
Refused	1%
<i>Concerning (net)</i>	<i>78%</i>
<i>Not Concerning (net)</i>	<i>3%</i>

- e. Payments from prescription drug manufacturers to payers, PBMs, health insurers, and other stakeholders tripled between 2012 and 2021 which some experts say is driving up the price of medicines

	Total
Very concerning	58%
Somewhat concerning	18%
Not too concerning	3%
Not at all concerning	1%
Don't know/no opinion	20%
Refused	1
<i>Concerning (net)</i>	<i>76%</i>
<i>Not Concerning (net)</i>	<i>3%</i>



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About the Study

The PhRMA and Ipsos Q2 2022 Tracking Survey was conducted May 13th – May 17th, 2022 by Ipsos using our KnowledgePanel®. This poll is based on a nationally representative probability sample of 2,514 adults age 18 or older in the United States.

The survey was conducted using KnowledgePanel, the largest and most well-established online probability-based panel that is representative of the adult US population. Our recruitment process employs an addressed-based sampling methodology using the latest Delivery Sequence File of the USPS – a database with full coverage of all delivery points in the US. Households invited to join the panel are randomly selected from all available households in the U.S. Persons in the sampled households are invited to join and participate in the panel. Those selected who do not already have internet access are provided a tablet and internet connection at no cost to the panel member. Those who join the panel and who are selected to participate in a survey are sent a unique password-protected log-in used to complete surveys online. As a result of our recruitment and sampling methodologies, samples from KnowledgePanel cover all households regardless of their phone or internet status and findings can be reported with a margin of sampling error and projected to the general population.

Weighting Plan:

For this study, our weighting process included the following steps:

1. In the first step, design weights for all KP assignees were computed to reflect their selection probabilities.
2. The above design weights for KP respondents who consented were raked to the following geodemographic distributions of the 18 and over population.

The needed benchmarks were obtained from the 2021 March Supplement of the Current Population Survey (CPS).

- a. Gender (Male, Female) by Age (18-29, 30-44, 45-59, 60+)
- b. Race-Ethnicity (White/Non-Hispanic, Black/Non-Hispanic, Other/Non-Hispanic, Hispanic, 2+ Races/Non-Hispanic)
- c. Metropolitan Status (Metro, Non-Metro) by Census Region (Northeast, Midwest, South, West)
- d. Education (Less than High School, High School, Some College, Bachelor or higher)
- e. Household Income (under \$25K, \$25K-\$49,999, \$50K-\$74,999, \$75K-\$99,999, \$100K-\$149,999, \$150K and over)

The resulting weights were scaled to sum to the un-weighted sample size of respondents (labeled as weight with 2,514 cases). 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 2.4 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=2,514, DEFF=1.34, adjusted Confidence Interval=+/-2.4 percentage points).



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About Ipsos

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Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

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