

PATIENT EXPERIENCE SURVEY

INNOVATION AT RISK: AMERICANS SPEAK OUT ON U.S. PHARMACEUTICAL LEADERSHIP AND THE NEED FOR AFFORDABLE ACCESS

PhRMA

February 2026



PES 6 Executive Summary

Americans overwhelmingly value U.S. pharmaceutical leadership.

The American general public sees implications for their health – i.e., 87% say if they got sick, they’d want to be treated here – for the U.S. economy via job creation, and in protecting our national security interests. But confidence lags – 59% believe we are the current leader in medical innovation. If we lose ground, majorities of Americans fear slower treatments, foreign dependency, and a nation less prepared for the next crisis.

Health insurance coverage costs and insurance-related barriers to care are problems to solve.

Among insured Americans, out-of-pocket costs land at the top of the list in terms of affordability concerns and health care issues to address. More than half of insured Americans report difficulty anticipating health care costs – *even with insurance*. And more than four in 10 report that they – or a family member – experienced a barrier to their care, such as prior authorization, in the last year. Health insurance companies are largely seen as prioritizing profits over care and as being most responsible for problems with our health care system.

From the lab to the pharmacy counter, insured Americans want a system that works for them.

Roughly nine in 10 insured Americans support policies that put patients first at the pharmacy counter, such as passing pharma company rebates directly to consumers and capping out-of-pocket costs. Nearly eight in 10 or more support faster approval and expanded access to lower-cost generics while preserving patent protections and prioritizing competition in the marketplace. Two in three or more support policies that help to strengthen American research and manufacturing infrastructure and modernize the FDA.



U.S. PHARMACEUTICAL LEADERSHIP

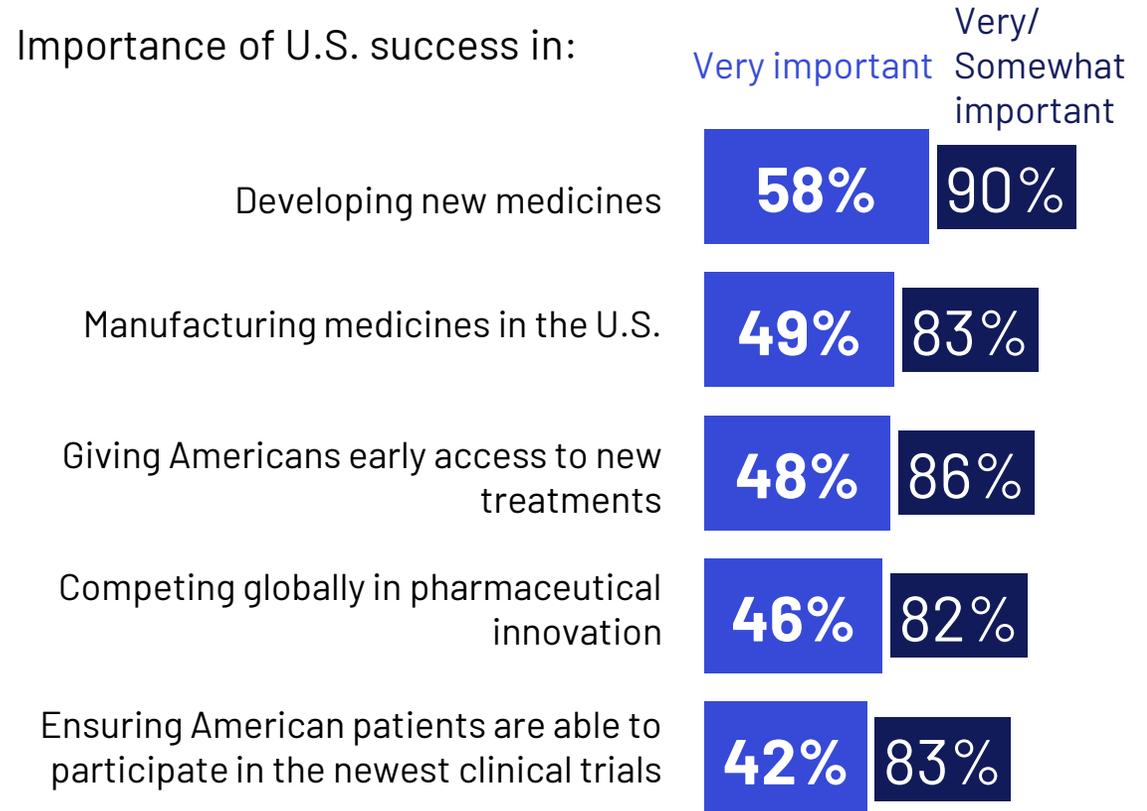
Findings among the American general public

#1

Americans overwhelmingly believe in the importance of a strong pharmaceutical industry

8 in 10

Believe it's important that **the U.S. is the global leader in developing new medicines** (79% agree)



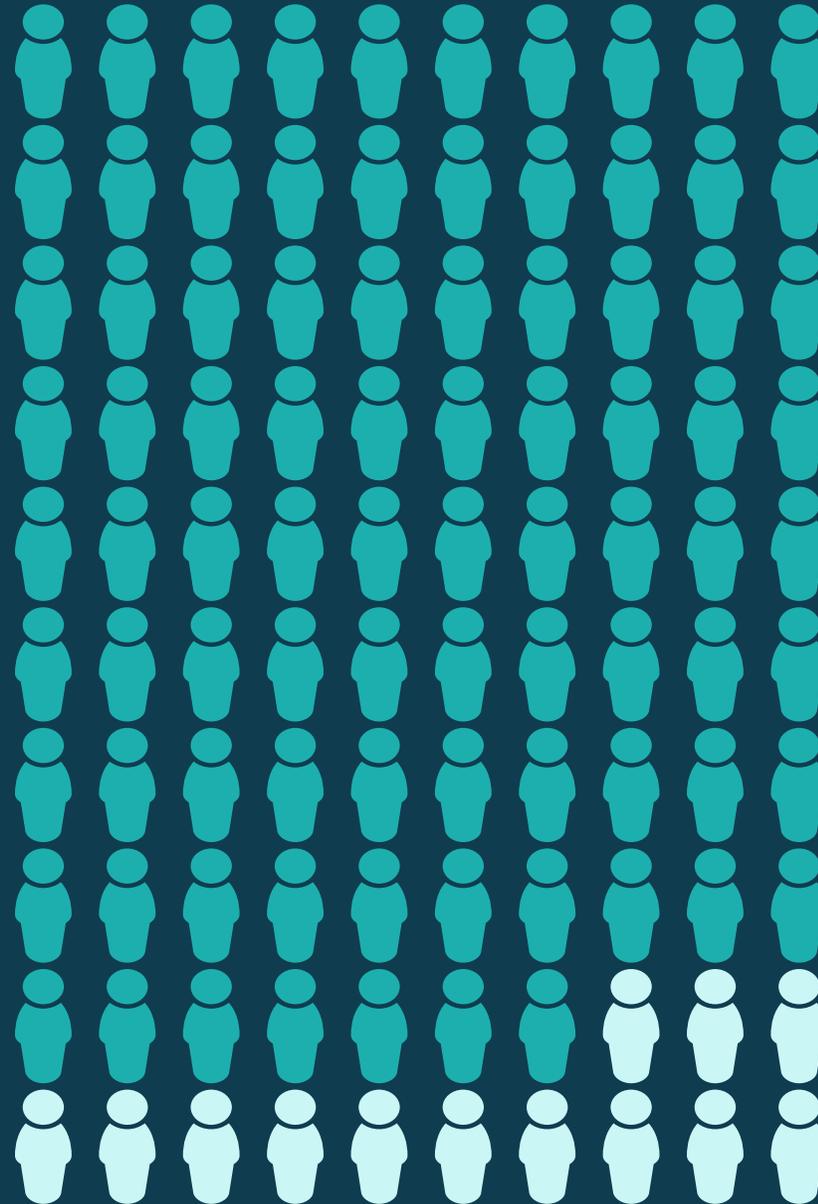
Q NEWQ6a. In your opinion, how important is it for the United States to be successful in each of the following areas?
 NEWQ6b. And how important is it for the United States to be the global leader in developing new medicines?
 Answer choices for both questions: Very important, Somewhat important, Not too important, Not at all important

Base: Total Americans n=2,141

87%

If I got very sick with a serious medical condition or disease, I would want to be treated in the United States

AMERICANS AGREE
57% "strongly" agree



NewQ7. Please indicate how much you agree or disagree with each of the following statements.
Answer choices: Strongly agree, Somewhat agree, Somewhat disagree, Strongly disagree
Base: Total Americans n=2,141

A strong pharmaceutical industry is seen to offer a myriad of benefits

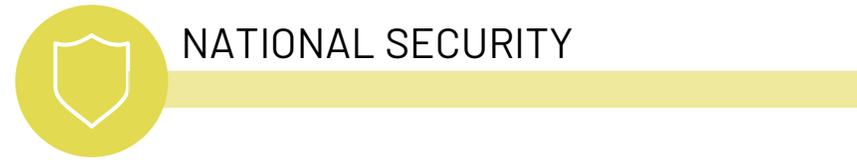
% Strongly/Somewhat agree



86%



We should invest in pharmaceutical R&D and manufacturing in the U.S. because it creates good jobs



82%



Maintaining pharmaceutical leadership protects the U.S. from becoming dependent on other countries for medicines

76%



Medical innovation is strategically important to our national security

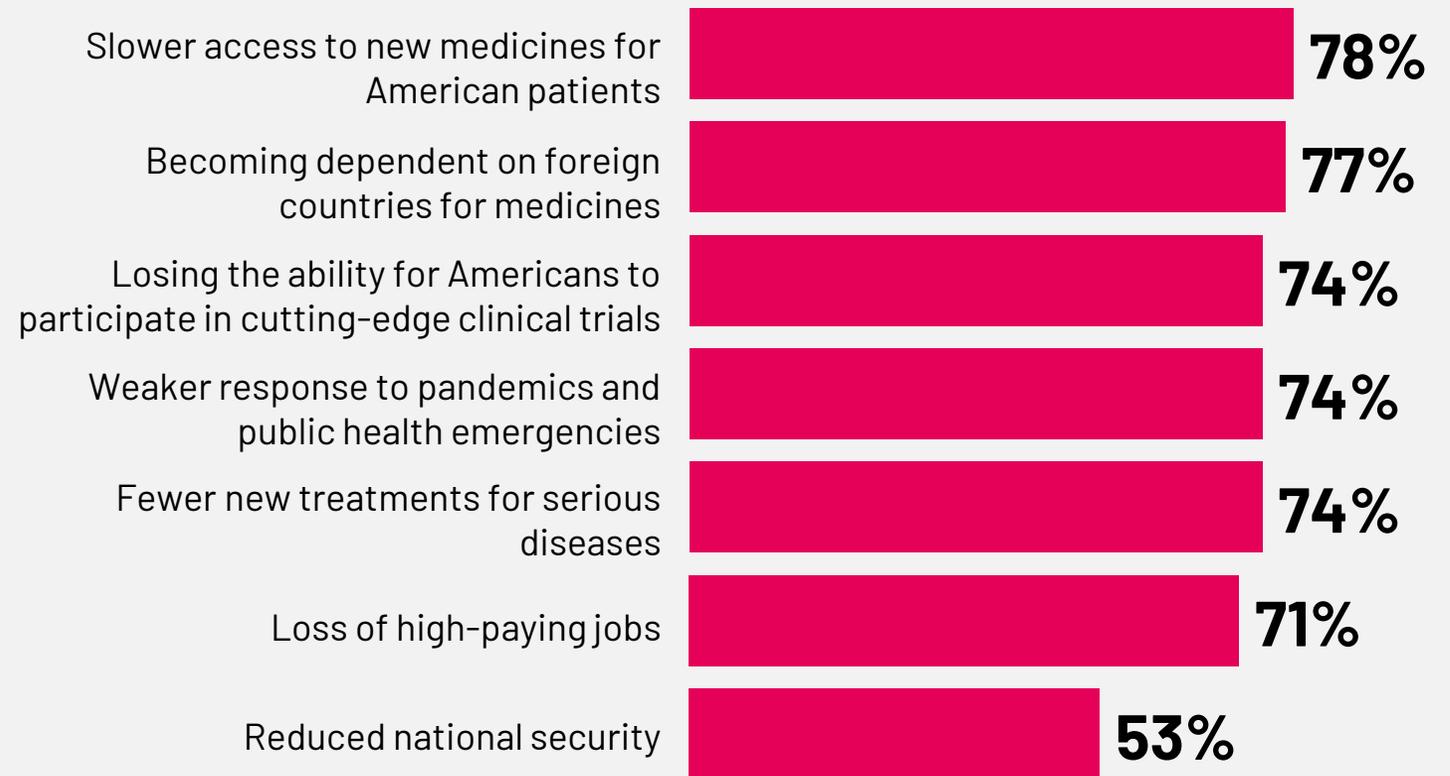
NewQ7. Please indicate how much you agree or disagree with each of the following statements.
Answer choices: Strongly agree, Somewhat agree, Somewhat disagree, Strongly disagree

Base: Total Americans n=2,141

**Six in 10 (59%)
Americans currently
see the U.S. as having
the strongest
medical innovation
ecosystem in the
world**

What is at stake if the U.S. loses ground?

% Very/Somewhat likely



NewQ7. Please indicate how much you agree or disagree with each of the following statements. Answer choices: Strongly agree, Somewhat agree, Somewhat disagree, Strongly disagree

NewQ8. How likely are each of the following to happen if the U.S. were to lose leadership in pharmaceutical innovation?

Answer choices: Very likely, Somewhat likely, Not too likely, Not at all likely

Base: Total Americans n=2,141

ACCESS & AFFORDABILITY

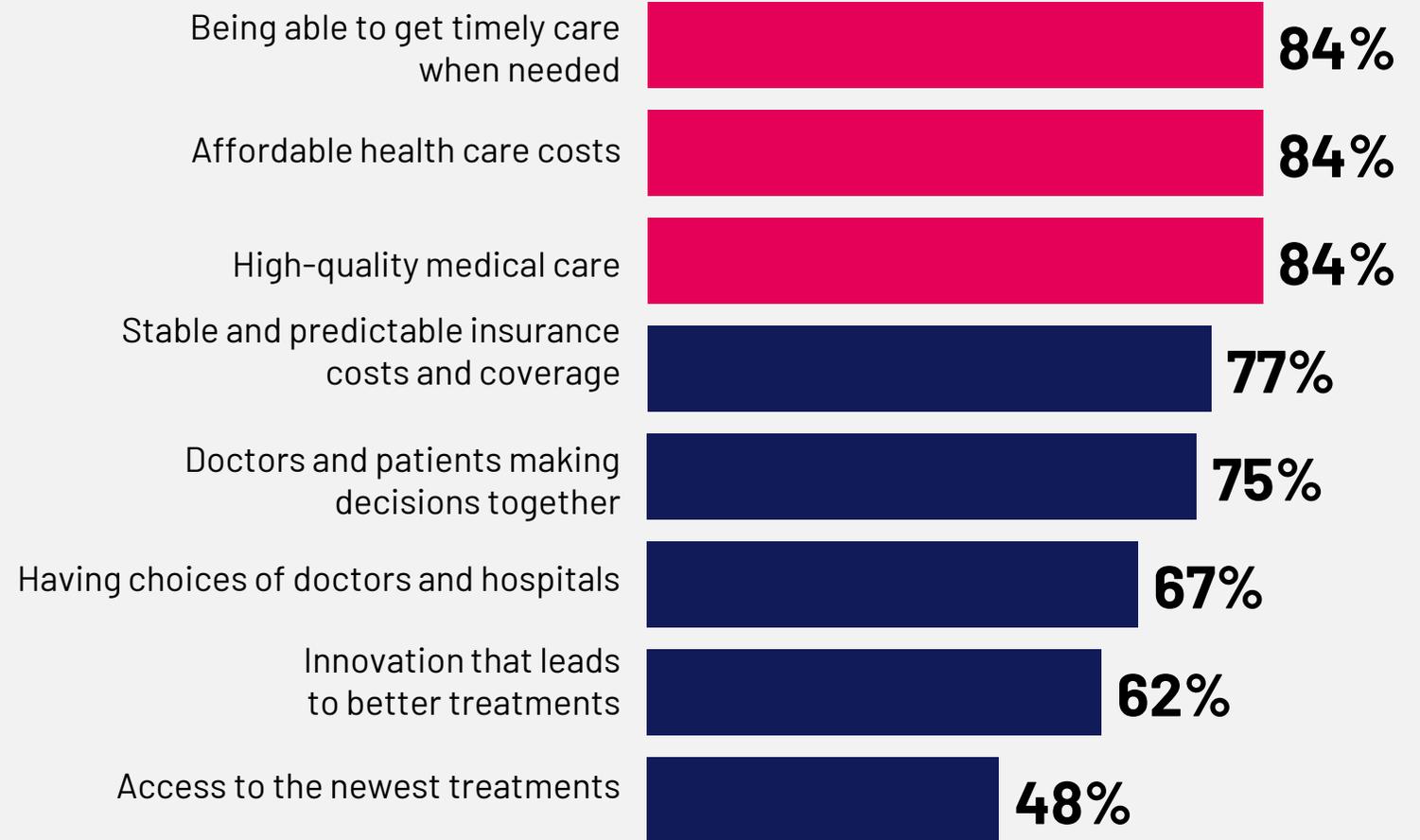
Findings among Insured Americans

#2

What matters to insured Americans when it comes to health care?

Timely access, affordable costs, and high-quality care are rated as most important

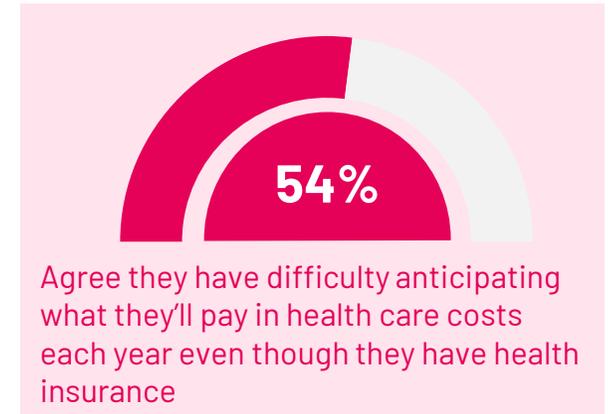
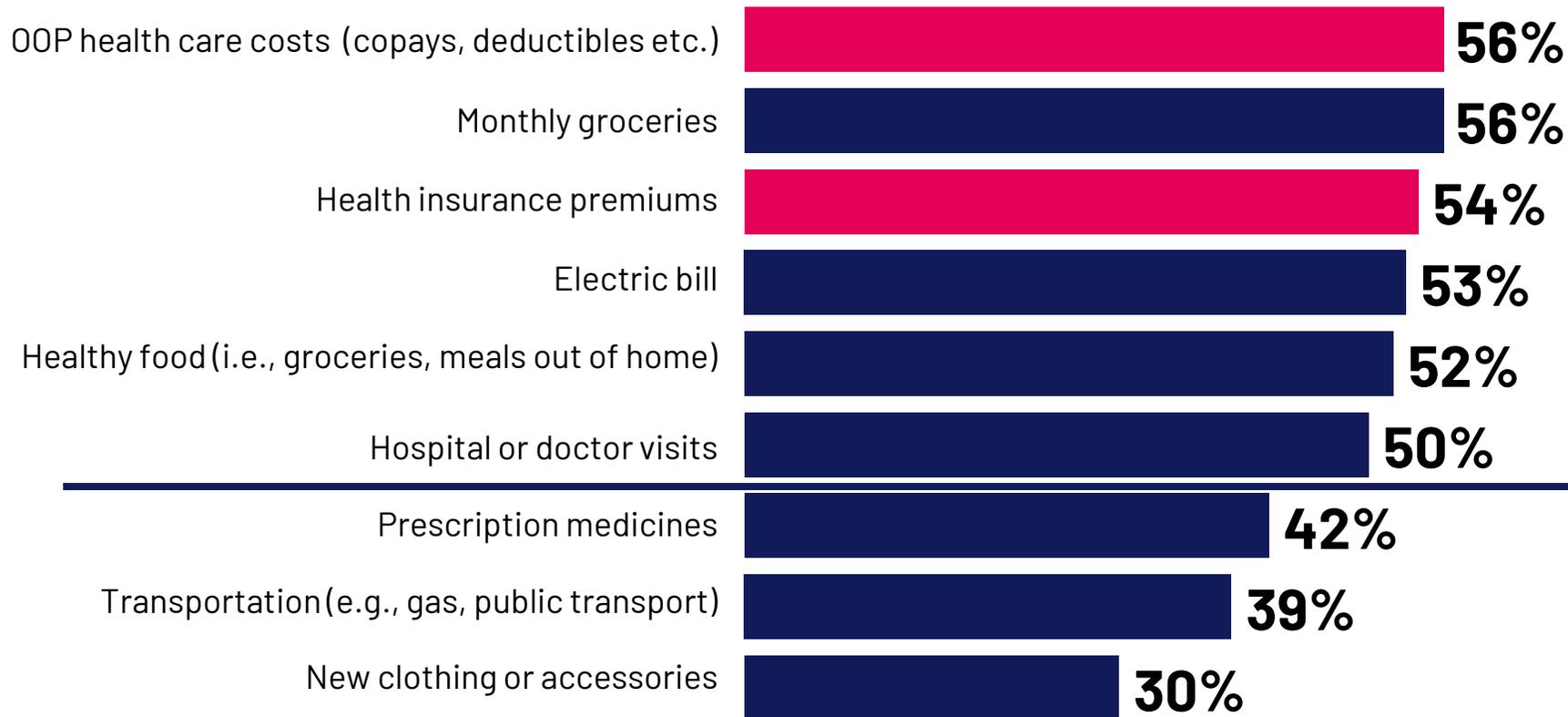
% Rate as very important



NEWQ5. When it comes to our health care system, how important are each of the following to you, personally?
Answer choices: Very important, Somewhat important, Not too important, Not at all important

Insured Americans' top affordability concerns are what insurance companies charge, along with groceries

% Very/Somewhat concerned about ability to afford...



NewQ3. Thinking about the next 12 months, how concerned, if at all, are you about your ability to afford the following: Answer choices: Very concerned, Somewhat concerned, Not very concerned, Not at all concerned. RW3. Thinking about your current health insurance coverage...Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the

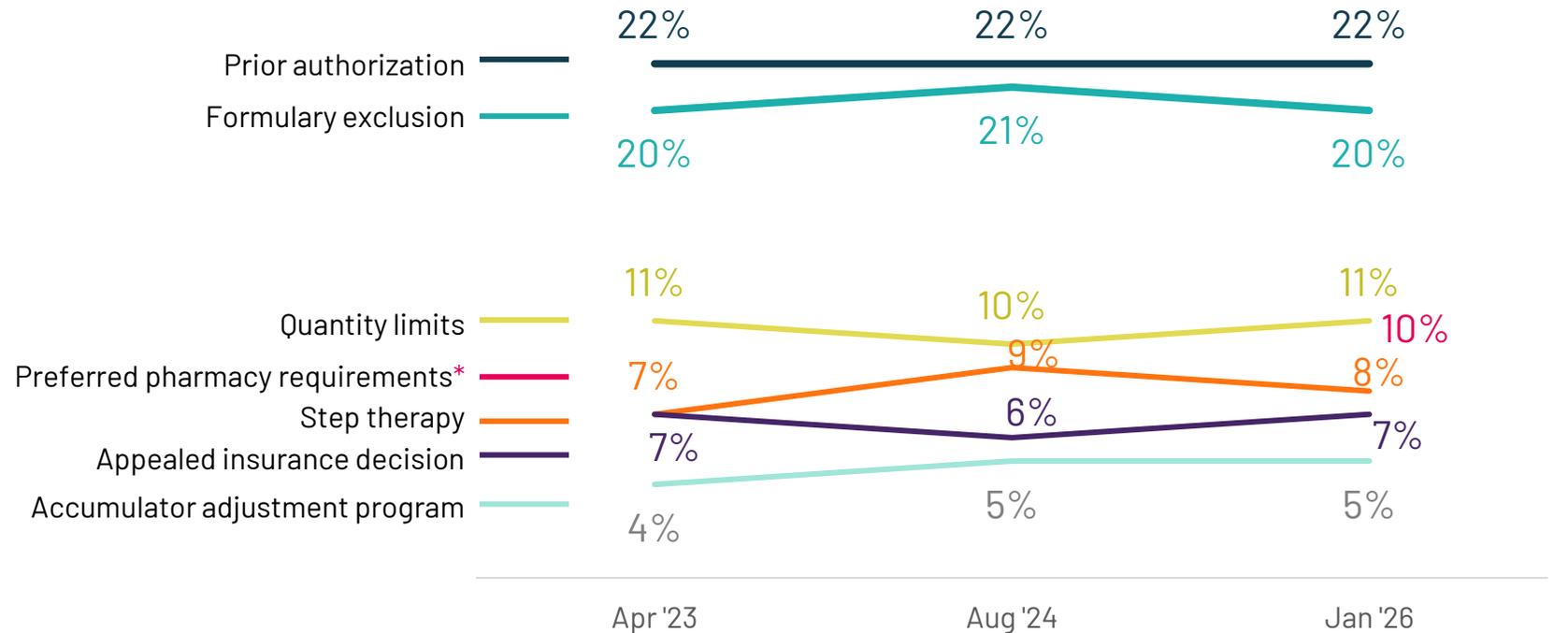
Over 4 in 10 insured Americans taking Rx experience insurer-imposed barriers to care (e.g., prior authorization)

44%

Report experiencing at least one barrier to accessing care in the past year (themselves or a family member)



ACCESS BARRIERS EXPERIENCED

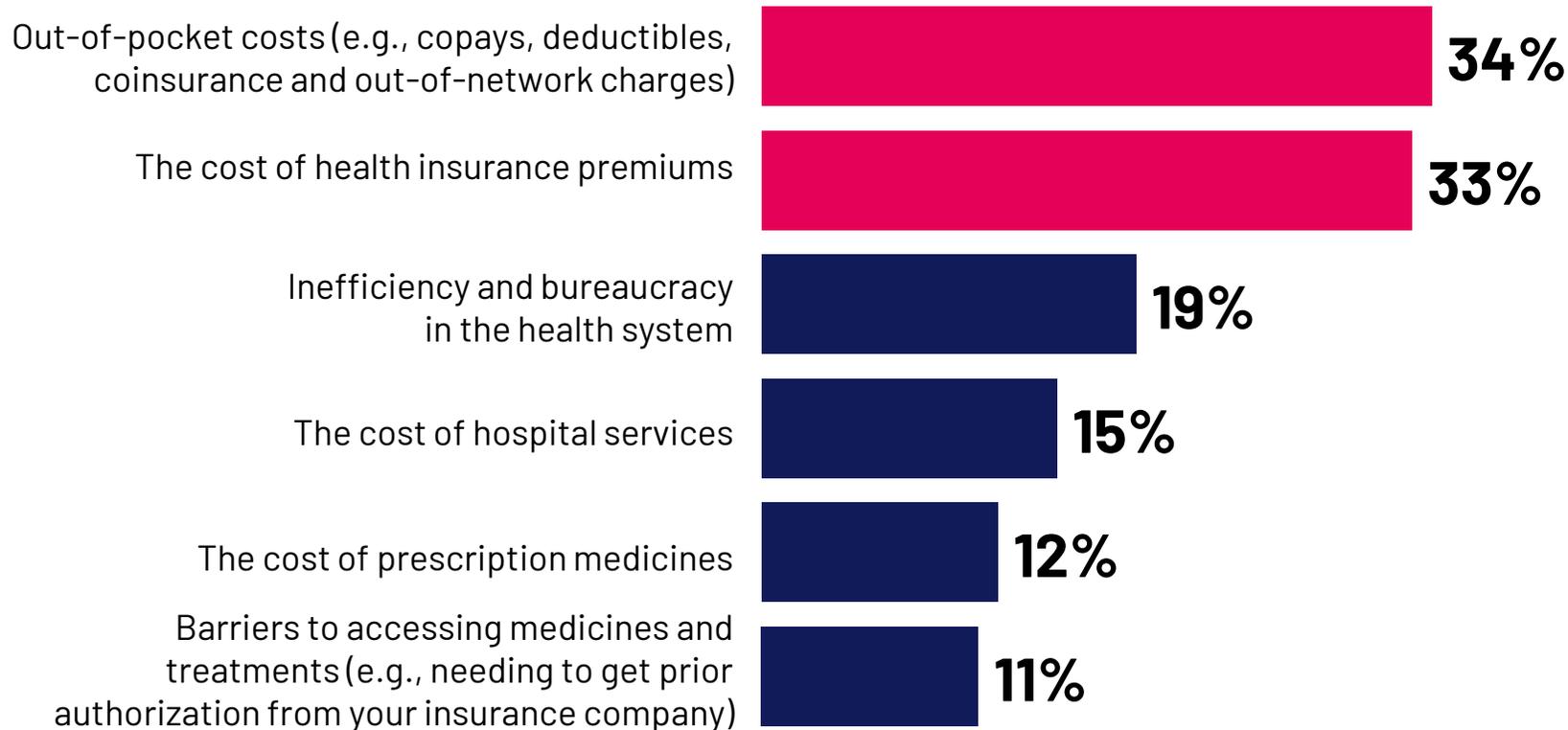


*new in Jan '26

Q39. Have any of the following happened to you or your family over the past year (12 months)? Answer choices: Select all that apply.

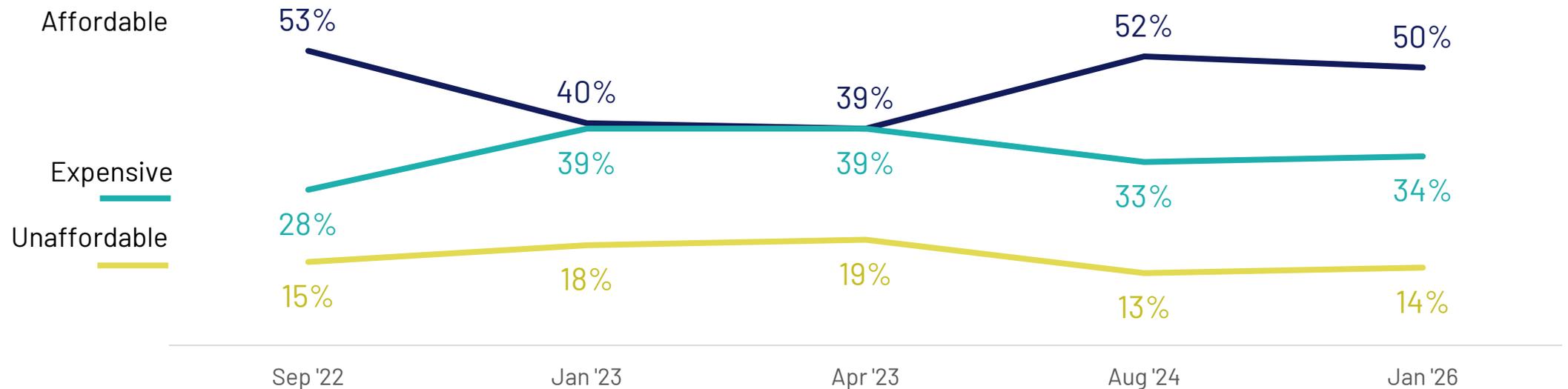
The most important health care issues to address are what insurance companies charge, not prescription drugs

% Most important health care issue (select 2)



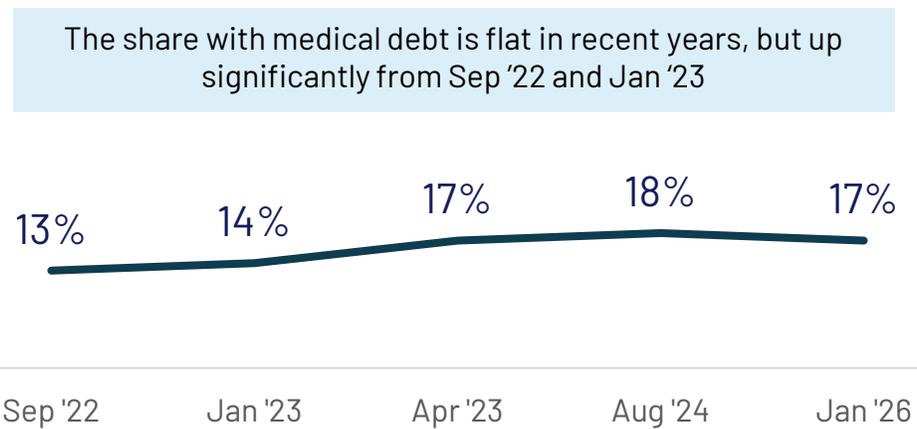
Nearly half (48%) continue to express concern that major medical event OOP costs would be expensive or unaffordable

If I had a major medical event or was diagnosed with a chronic illness, my out-of-pocket costs would be...



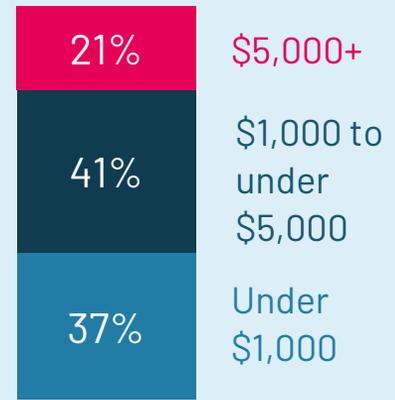
Nearly 1 in 5 insured Americans have medical debt – typically stemming from hospital and doctor bills, as well as diagnostic tests

Have outstanding medical debt



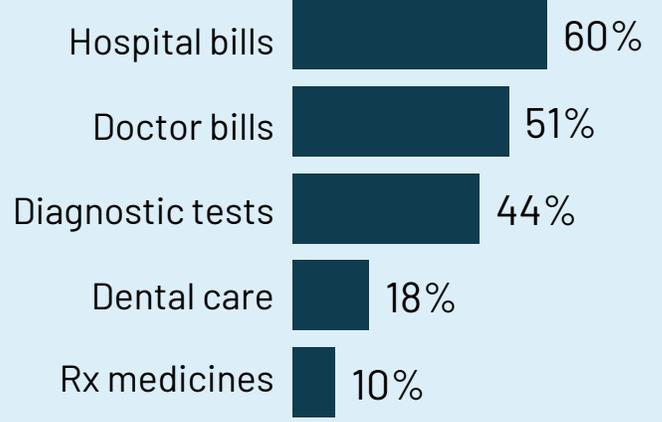
Among those with medical debt...

Amount of debt



Mean: \$3,022 / Median: \$1,259

Top sources of debt



Q34A. Do you currently have any outstanding debt for medical expenses (money that you owe for health care services you could not afford at the time)? Answer choices: Yes, No.

Base: Insured Americans n=1,929

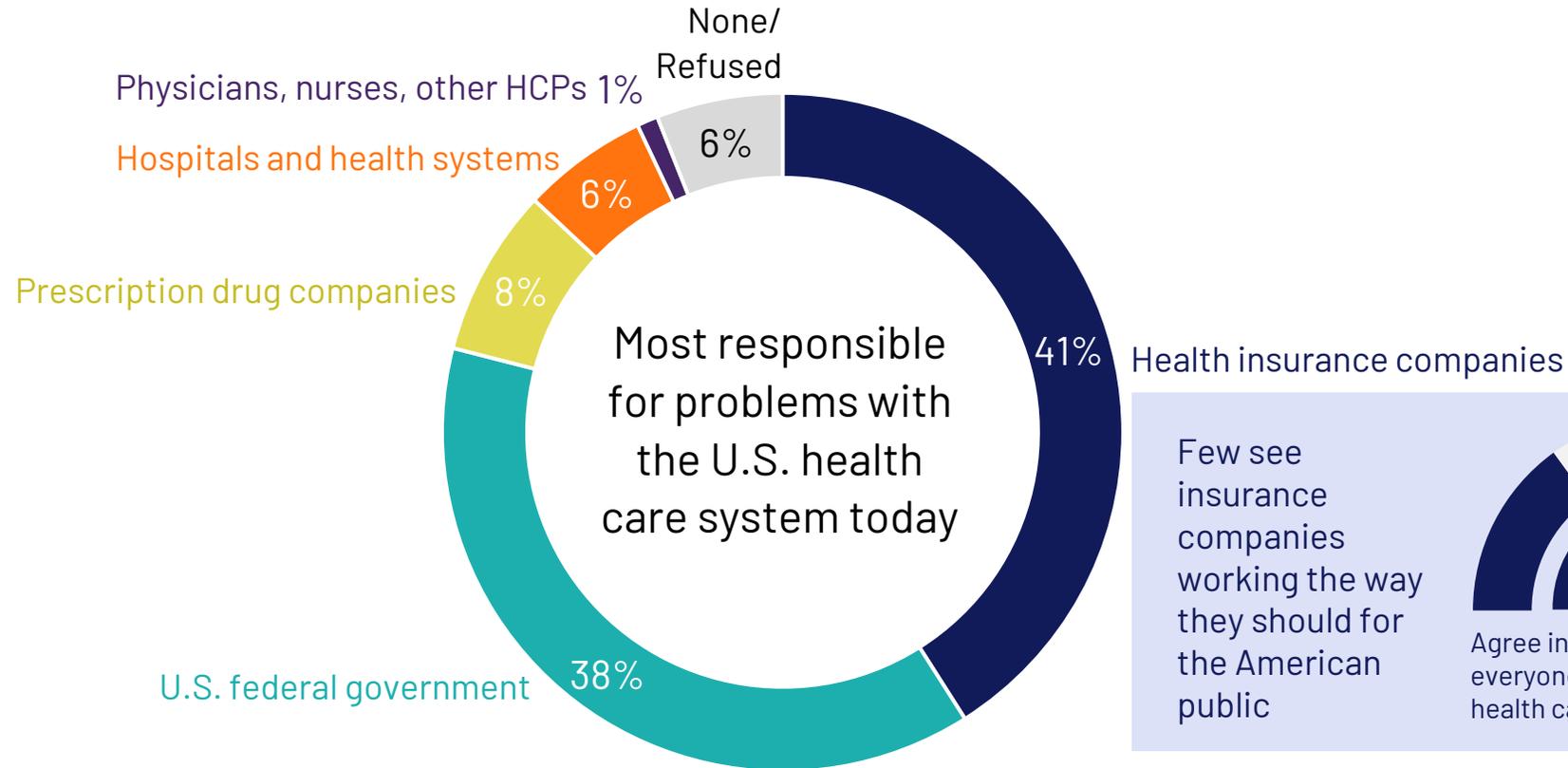
Q34B. Approximately how much do you owe in outstanding medical debt (money that you owe for health care services you could not afford at the time)?

Q34C. Which health care expenses do you owe money for as part of your total outstanding medical debt?

Base: Those with medical debt n=309



Health insurance companies are seen as MOST to blame for problems in our current health care system



Few see insurance companies working the way they should for the American public

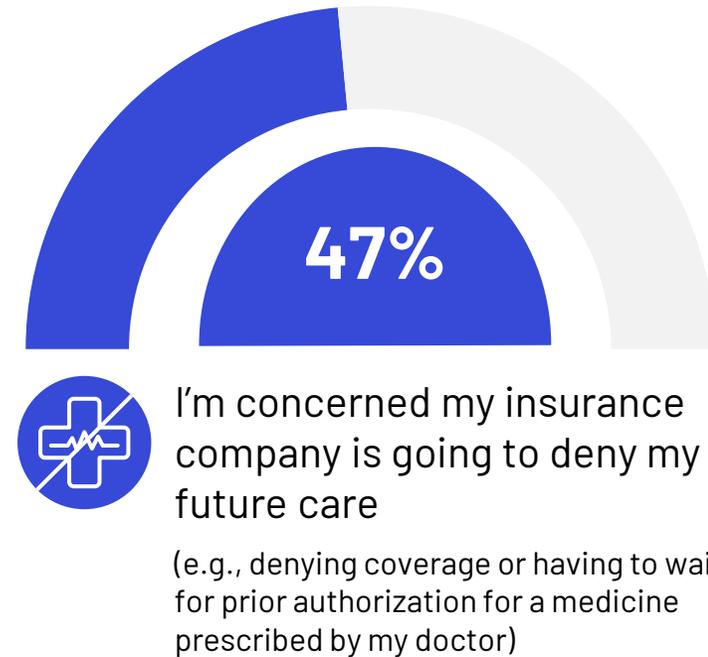
Only 30%

Agree insurance currently provides everyone with affordable access to health care, when it's needed

NEWQ4. Who do you feel is most responsible for problems in the U.S. health care system today?
 Q42. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. (Strongly/Somewhat agree shown)
 Base: Insured Americans n = 1929

Many believe their insurance company prioritizes profits over care and worry about denial of care

% Strongly/Somewhat agree



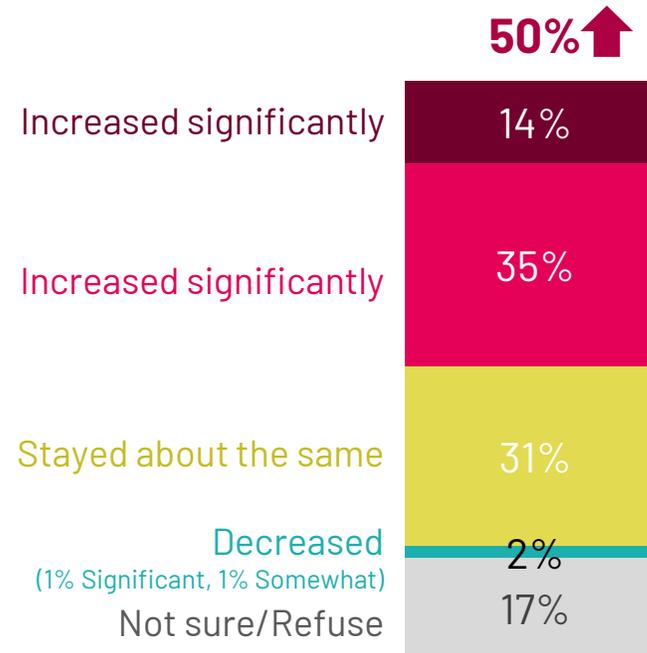
QRW3. Thinking about your current health insurance coverage...Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements. Base: Insured Americans n = 1929

Half of insured Americans report an increase in premiums over the past 12 months – an average of \$117 per month

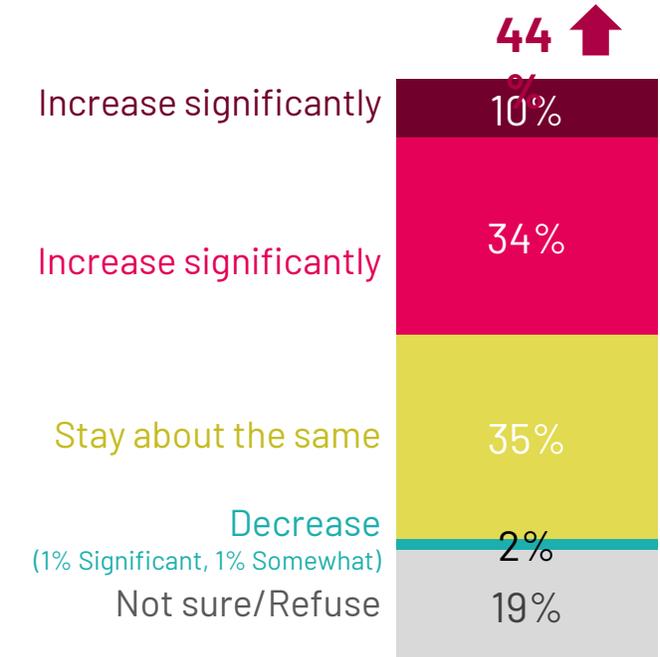
More than four in 10 anticipate an increase over the next 12 months

Change in health insurance premiums...

Over the past 12 months, have:



Over the next 12 months, expect to:



Q56a. Over the past 12 months, has your health insurance premium...? Base: Insured Americans n=1,929

Q56b. About how much did your health insurance premium increase over the past 12 months? Base: Insured Americans who saw an increase in premiums n=986

Q55c. Do you expect your health insurance premium to increase, decrease, or stay about the same over the next 12 months? Base: Insured Americans n = 1,929

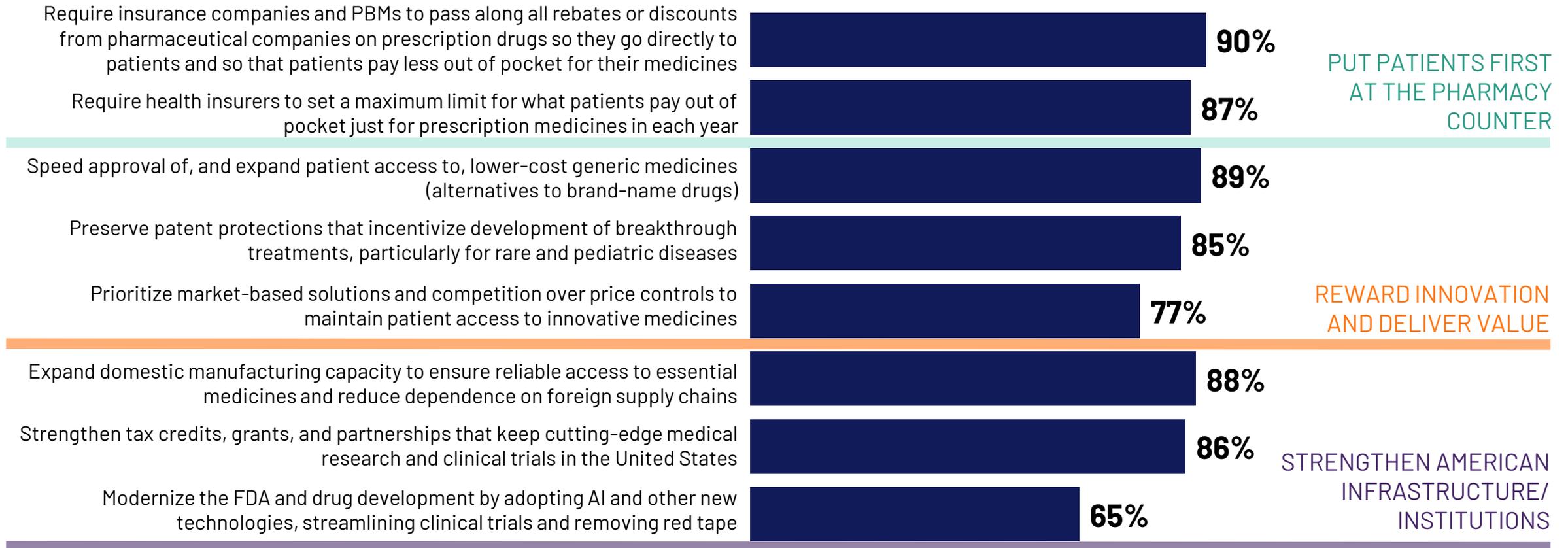
SOLUTIONS

Findings among Insured Americans

#3

From the lab to the pharmacy counter, Americans want a system that works for them

% Strongly/Somewhat support solutions that...



NewQ59. Below are some policies that the government could pursue to address health care costs. For each, please indicate whether you... Answer choices: Strongly support, Somewhat support, Somewhat oppose, or Strongly oppose

Base: Insured Americans n=1,929

Insured Americans show an openness to cutting out middlemen, buying directly from medicine manufacturers



Purchasing medicines directly from manufacturers without the middleman markups

Level of interest **77%**

Very interested 36%

Somewhat interested 41%

Likelihood of using if Rx drug costs were lowered **85%**

Very likely 48%

Somewhat likely 37%

Q60. Several new websites will launch in 2026 that will allow patients to purchase medicines directly from manufacturers without the middleman markups. How interested are you, if at all, in learning more about these websites? Answer choices: Very interested, Somewhat interested, Not too interested, Not at all interested

Q61. If purchasing medicines directly from the manufacturer could lower your prescription drug costs, how likely would you be to purchase medicines from these websites? Answer choices: Very likely, Somewhat likely, Not too likely, Not at all likely. Base: Insured Americans n=1,929

APPENDIX

Methodology



Field Period

January 16-23, 2026



Qualifications

Total sample of n=2,141 adults ages 18+, including n=1,929 who are insured (and the focus of this report)



Sample & Mode

The survey was conducted online among a nationally representative probability sample, using the KnowledgePanel®

Ipsos's KnowledgePanel is the only large-scale representative panel of the adult population in the US for which members are recruited using a probability-based address-based sampling methodology. In order to maintain full representation of all adults, households without Internet access are provided internet-enabled devices and ISP, as well.

PES Survey Respondents

Insured Americans:

	Jan '26
n=	1,929
Gender	
Male	49%
Female	51%
Age	
18-44	43%
45-64	32%
65+	25%
Race/ethnicity	
Non-Hispanic White	62%
Non-Hispanic Black	11%
Non-Hispanic Asian	7%
Hispanic	17%
HH Income	
Less than \$75K	34%
\$75K+	66%
Party ID	
Democrat	31%
Republican	32%
Independent/Other	37%

	Jan '26
n=	1,929
Rx patient	70%
Chronic disease patient	38%
Self-assessment of health	
5 – Excellent / 4	50%
3 – Average	39%
1 – Poor / 2	10%
Insurance	
Commercial	67%
Govt.	40%
Plan includes a deductible	71%
Annual deductible is... (among those with a deductible)	
Less than \$1,500/year	35%
\$1,500-\$2,999/year	33%
\$3,000/year	29%