

Key Findings: National Phone Survey

April 30 – May 5, 2019



Methodology

Public Opinion Strategies conducted a national telephone survey on behalf of PhRMA.

The survey was conducted between April 30 – May 5, 2019 among N=800 registered voters. Margin of error for N=800 is +3.46%.

Executive Summary

1. Health care concerns are about cost, with much more focus on the cost of health insurance than prescription drugs.
2. There are a number of proposals with strong support to address prescription drug prices, including insurers passing through discounts and more transparency.
3. There is higher opposition and a lack of support for the federal government setting or determining the price of prescription drugs and the importation of non-FDA approved drugs.
4. The Rebate Rule proposal enjoys substantial support (76% favor, 34% strongly favor) that is consistently high across sub-groups.

The Health Care Environment



#19132

Health care concerns are about cost, with much more focus on the cost of health insurance than prescription drugs.

<i>Ranked by First Choice</i>	First Choice	Combined Choice
The cost of health insurance premiums, deductibles or co-pays	38%	56%
The cost of prescription drugs	14%	31%
The cost of hospital services	12%	26%
Fraud and abuse in the health care system	7%	15%
Limited options for health insurance coverage	7%	14%
Unexpected or “surprise” medical bills from health care providers	6%	15%
Dealing with addiction to opioids and prescription painkillers	6%	13%
Limited access to quality hospitals and treatments	3%	12%
The cost of medical devices and health aides	2%	6%

Thinking about health care...From the following list, which health care issue is most important to you?

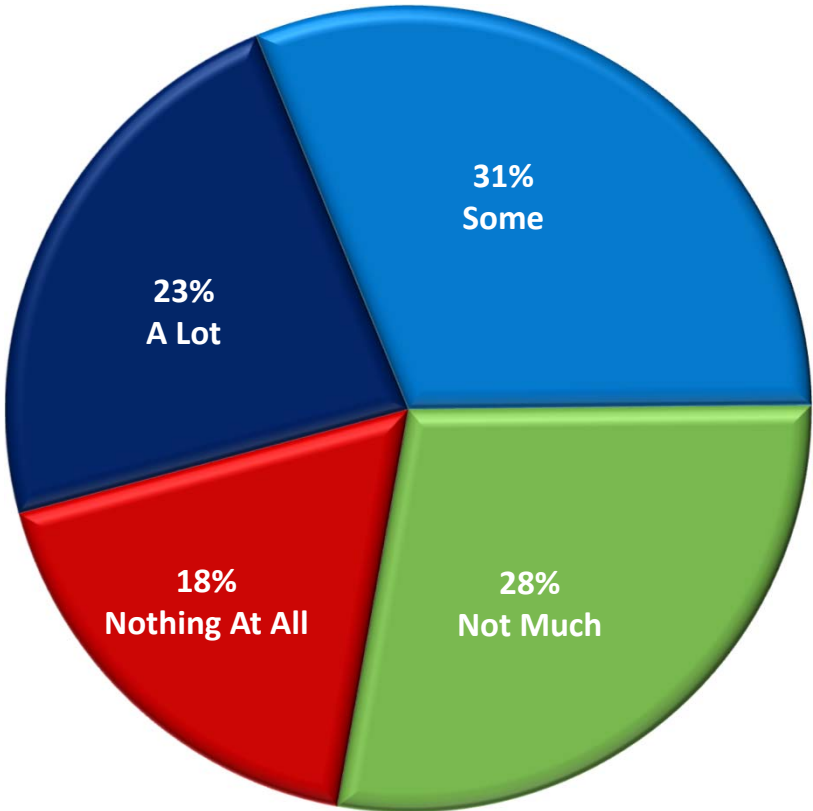
More than half of voters say they would prefer their health plan have a higher monthly premium, lower co-pays and deductibles for comprehensive coverage than a lower monthly premium, higher co-pays and deductibles for basic coverage.

Thinking about your health plan, which would you prefer?

You pay a **higher monthly premium** for comprehensive coverage but have **lower co-pays and deductibles** when you pay for care and treatments you need **51%**

You pay a **lower monthly premium** for basic coverage but have **higher co-pays and deductibles** when you pay for care and treatments you need **43%**

A majority of voters say they have seen, read, or heard “a lot” or “some” about proposals that would make changes to Medicare.



Total A Lot/Some	54%
Total Not Much/Nothing	46%

How much you have seen, read, or heard, if anything, recently about proposals that would make changes to Medicare? Have you seen, read, or heard...

Voters are most focused on making Medicare financially secure.

<i>Ranked by First Choice</i>	First Choice	Combined Choice
Making sure the Medicare system is financially sound for future generations	36%	54%
Making sure Medicare patients have access to the best available treatments and services	16%	31%
Lowering the cost Medicare patients pay for premiums and co-pays	14%	34%
Lowering the cost Medicare patients pay for prescription drugs	14%	32%
Making sure Medicare patients have a wide choice of doctors and providers	7%	21%
Reducing federal government spending on Medicare	5%	9%
All of these	5%	5%
None of these	1%	4%

And, thinking about the future of Medicare, which ONE of the following do you think is most important to focus on?

Prescription Drug Cost Proposals



#19132

There are a number of proposals with strong support to address prescription drug prices, including insurers passing through discounts and more transparency.

<i><u>Ranked by % Total Favor</u></i>	Strongly Favor	Total Favor
Require hospitals to be more transparent about what you will pay for medical services and treatments.	81%	95%
Require health insurance companies to pass along to patients more of the discounts on prescription drugs they negotiate with drug manufacturers.	75%	92%
Strengthen the U.S. Food and Drug Administration, also known as the FDA, to review and get generic prescription drugs to market faster.	61%	86%
Require health insurance companies to be more transparent about what prescription drugs are covered in health plans and what people will pay for them.	74%	85%
Update government regulations so that health insurance companies and drug manufacturers can negotiate innovative contracts so that the newest prescription drugs are covered by health plans.	52%	85%

Thinking now about prescription drug costs...I am going to read you a list of some different things the government could do to address prescription drug costs. For each one, please tell me whether you strongly favor, somewhat favor, somewhat oppose or strongly oppose the government doing it or if you have no opinion about it one way or the other.

These two proposals also receive significant support.

<i><u>Ranked by % Total Favor</u></i>	Strongly Favor	Total Favor
Remove the barriers that prevent or slow down generic prescription drugs from coming to market.	59%	77%
Negotiate stronger trade agreements so that Americans subsidize less of the prescription drug costs of other countries.	40%	61%

Thinking now about prescription drug costs...I am going to read you a list of some different things the government could do to address prescription drug costs. For each one, please tell me whether you strongly favor, somewhat favor, somewhat oppose or strongly oppose the government doing it or if you have no opinion about it one way or the other.

There is a lack of support for the federal government setting or determining the price of prescription drugs and the importation of non-FDA approved drugs.

<u>Ranked by % Total Favor</u>	Strongly Favor	Total Favor
Allow the federal government to set the price of prescription drugs in Medicare based on the average prescription drug price in foreign countries.	20%	40%
Allow the federal government to determine the price of prescription drugs and determine which prescription drugs are covered in Medicare.	15%	33%
Allow patients and pharmacies to import non-FDA approved prescription drugs from other countries.	13%	32%

Thinking now about prescription drug costs...I am going to read you a list of some different things the government could do to address prescription drug costs. For each one, please tell me whether you strongly favor, somewhat favor, somewhat oppose or strongly oppose the government doing it or if you have no opinion about it one way or the other.

When asked to select just one option, insurers passing through discounts and generics getting to the market faster rise to the top.

	Total Most Support
Require health insurers to pass along to patients the discounts on prescription drugs they negotiate with drug manufacturers	25%
Strengthen the FDA to get generic prescription drugs to market faster	21%
Require health insurers to be transparent about what prescription drugs are covered in your plan and what you will pay	17%
Update government regulations so the newest prescription drugs are covered by health plans	15%
Allow the federal government to set the price of prescription drugs in Medicare based on the average price in foreign countries	13%
Allow patients and pharmacies to import non-FDA approved prescription drugs from other countries	5%

And which ONE of the following things that the government could do to address prescription drug costs do you SUPPORT the most?

The Rebate Rule proposal has strong support with very little opposition.

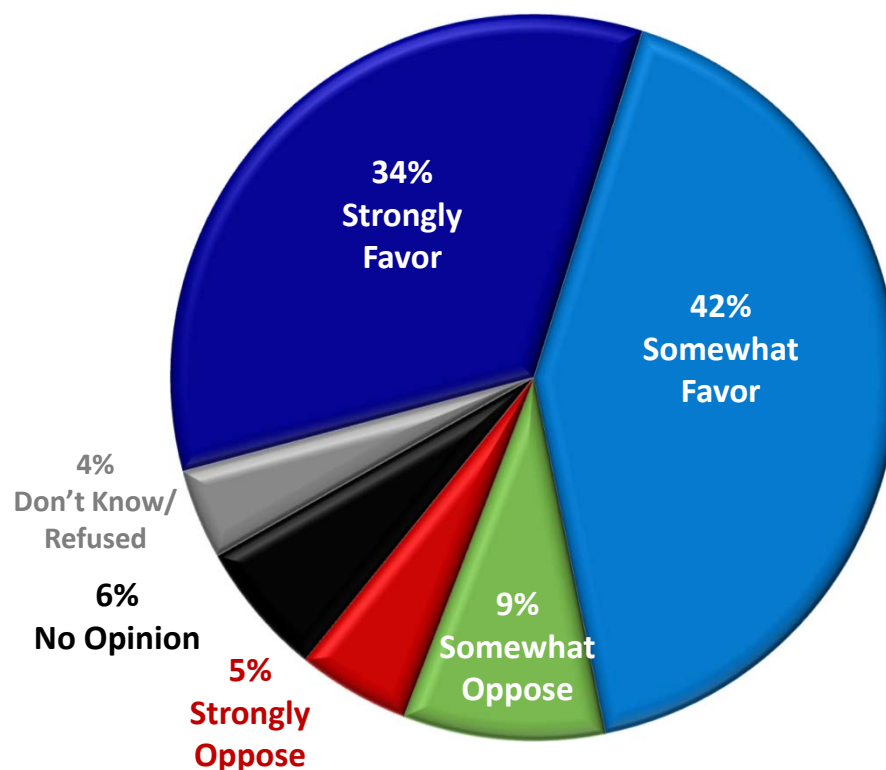
“Thinking about Medicare, which is the federal government health care program that provides both health coverage and prescription drug coverage for seniors and the disabled.”

“I am going to read you a proposal being considered regarding Medicare's prescription drug coverage for prescription drugs picked up at the pharmacy called the Rebate Rule proposal:

Currently, health insurance companies and pharmacy benefit managers (PBMs) negotiate rebates and discounts on prescription drugs from drug manufacturers. They generally use these discounts to lower seniors' monthly insurance premiums. Under this new rebate rule proposal these rebates and discounts would instead now be used to lower what seniors pay for the prescription drugs they pick up at the pharmacy.

Do you favor or oppose this rebate rule proposal?”

Total Favor	76%
Total Oppose	14%



Support for the Rebate Rule proposal is consistently high across key sub-groups.

	Total Favor	Total Oppose	Net Difference
TOTAL	76%	14%	+62%
Men (47%)	73%	15%	+58%
Women (53%)	79%	13%	+66%
Ages 18-44 (45%)	76%	12%	+64%
Ages 45-64 (37%)	75%	17%	+58%
Ages 65+ (18%)	79%	14%	+65%
Men Ages 18-54 (32%)	68%	16%	+52%
Men Ages 55+ (15%)	83%	12%	+71%
Women Ages 18-54 (29%)	82%	13%	+69%
Women Ages 55+ (24%)	76%	14%	+62%
White (72%)	76%	14%	+62%
African Americans (12%)	75%	17%	+58%
Hispanics (10%)	85%	12%	+73%
White Men (35%)	70%	16%	+54%
White Women (37%)	81%	11%	+70%
Private Insurance (62%)	75%	15%	+60%
Medicare (19%)	82%	13%	+69%

	Total Favor	Total Oppose	Net Difference
TOTAL	76%	14%	+62%
Republicans (35%)	74%	20%	+54%
Independents (22%)	73%	13%	+60%
Democrats (41%)	79%	10%	+69%
Republican Men (19%)	67%	24%	+43%
Republican Women (16%)	81%	14%	+67%
Democratic Men (14%)	75%	9%	+66%
Democratic Women (27%)	81%	11%	+70%
2016 Trump Voters (39%)	74%	19%	+55%
2016 Clinton Voters (42%)	79%	11%	+68%
Men < College (28%)	75%	15%	+60%
Men College + (18%)	67%	16%	+51%
Women < College (26%)	79%	13%	+66%
Women College + (27%)	79%	14%	+65%
Income < \$60K (39%)	80%	13%	+67%
Income \$60-\$100K (27%)	76%	14%	+62%
Income \$100K + (27%)	72%	15%	+57%



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