



TO: PhRMA
FR: Morning Consult
DT: April 2023
RE: MRP Survey Results – Pharmacy Benefit Managers

Morning Consult ran a poll, on behalf of PhRMA, that examines adults' perception of the role that insurance company middlemen, also known as pharmacy benefit managers (PBMs), have in the health care industry. 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

- Adults' express concerns about insurance company middlemen, like pharmacy benefit managers (PBMs), once they learn about their business practices and their impact on patients accessing and affording their prescription medicines.

PBM Facts and Business Practices	Very concerned	Somewhat concerned	Total Concern
They overcharge for prescription medicines and pocket the difference as profit	69%	16%	85%
They deny patients from using tools such as copay coupons, to reduce drug costs	64%	21%	85%
They control what medicines patients get and what patients pay for them	63%	22%	85%
They do not share the discounts they get on prescription medicines with patients	62%	22%	84%
They operate with little to no transparency into their pricing or business practices	63%	21%	84%
They often steer patient to pharmacies they own so they can make more profit	62%	22%	84%
Just three PBMs control 80% of the U.S. prescription drug market	60%	22%	82%

- There is a bipartisan concern for pharmacy benefit managers (PBMs) and their business practices, with at least four-in-five Democrat, Republican, and Independent adults concerned for each item tested. Among the items tested, each group of adults is most concerned with PBMs overcharging for prescription medicines and pocketing the difference as profit:
 - Democrats – 88% concerned (72% very concerned)
 - Independents - 81% concerned (66% very concerned)
 - Republicans - 88% concerned (70% very concerned)
- 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).
 - Democrats – 88% concerned (72% very concerned)
 - Independents - 80% concerned (55% very concerned)
 - Republicans - 85% concerned (55% very concerned)
- 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).
 - Democrats – 88% concerned (64% very concerned)
 - Independents - 79% concerned (52% very concerned)
 - Republicans - 82% concerned (51% very concerned)

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.