

The Patient Experience in Context

Spring 2023

Overview of the *Patient Experience Survey: Protecting Lifelines to Access and Innovation*

1. Health Insurance Isn't Working As It Should



Out-of-pocket costs, deductibles and even debt frustrate Americans

2. Insurer- and PBM-Imposed Practices Put Patient Lifelines at Risk



Insurers and PBMs stand between patients and medicines, and jeopardize access to new and innovative medicines

3. Americans Value Innovation, Patient-Focused Policies



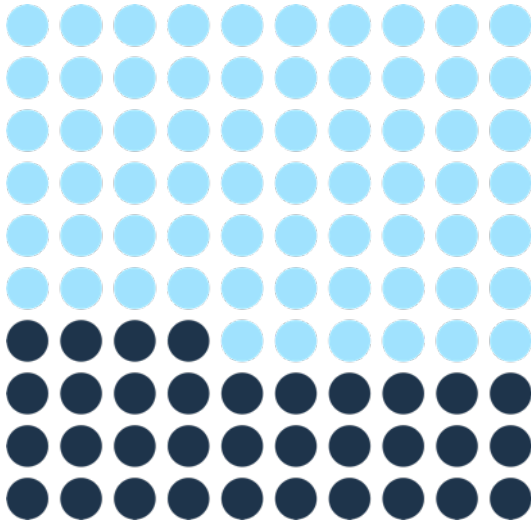
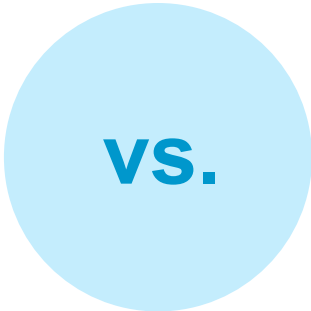
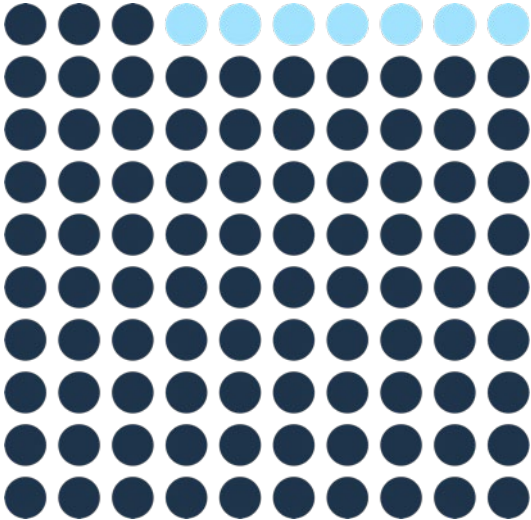
Overwhelming majorities of Americans want to hold insurers and PBMs accountable and lower costs for patients

Americans Say Insurance Isn't Working Like it Should

93%

% agree

34%

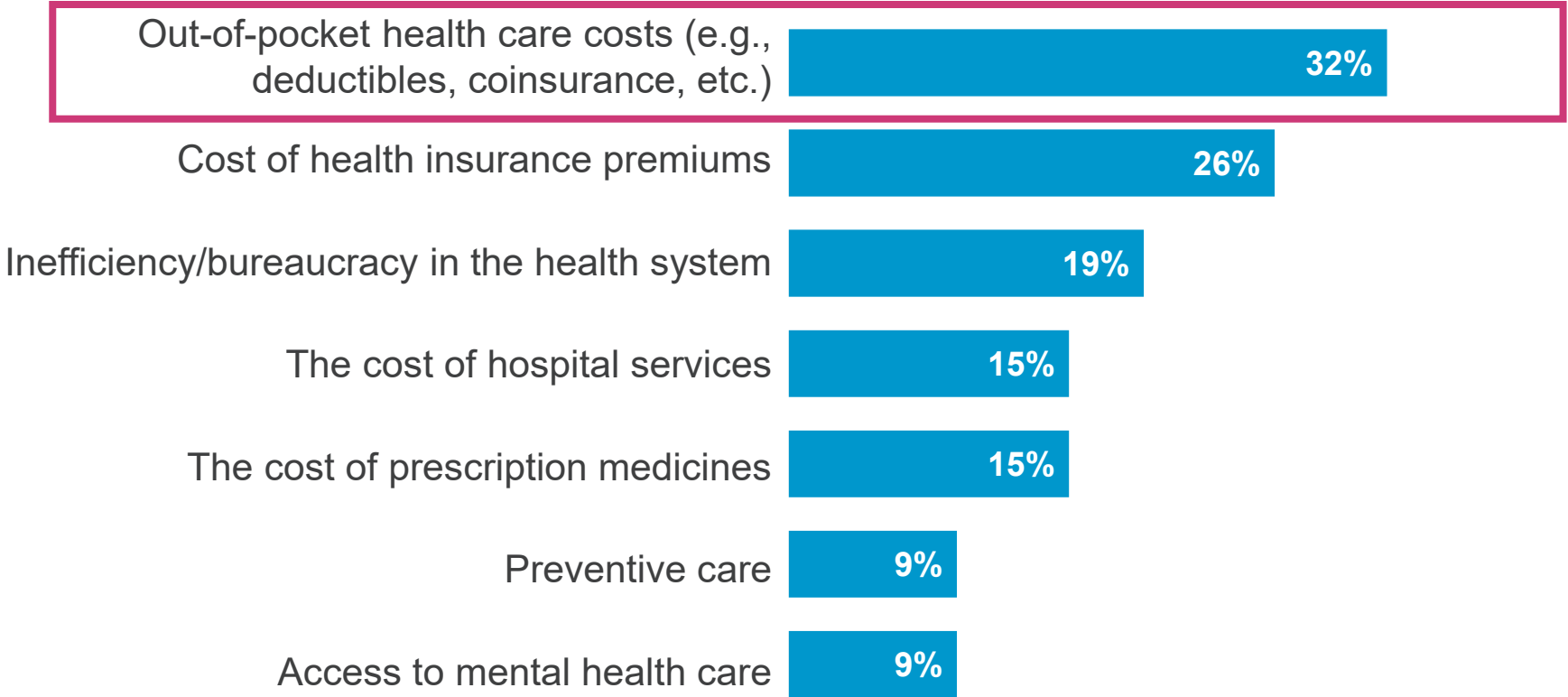


Insurance **should work for everyone** by providing affordable access to health care, when it's needed

Insurance **currently provides everyone** with affordable access to health care, when it's needed

Out-of-Pocket Costs are the Health Care Priority

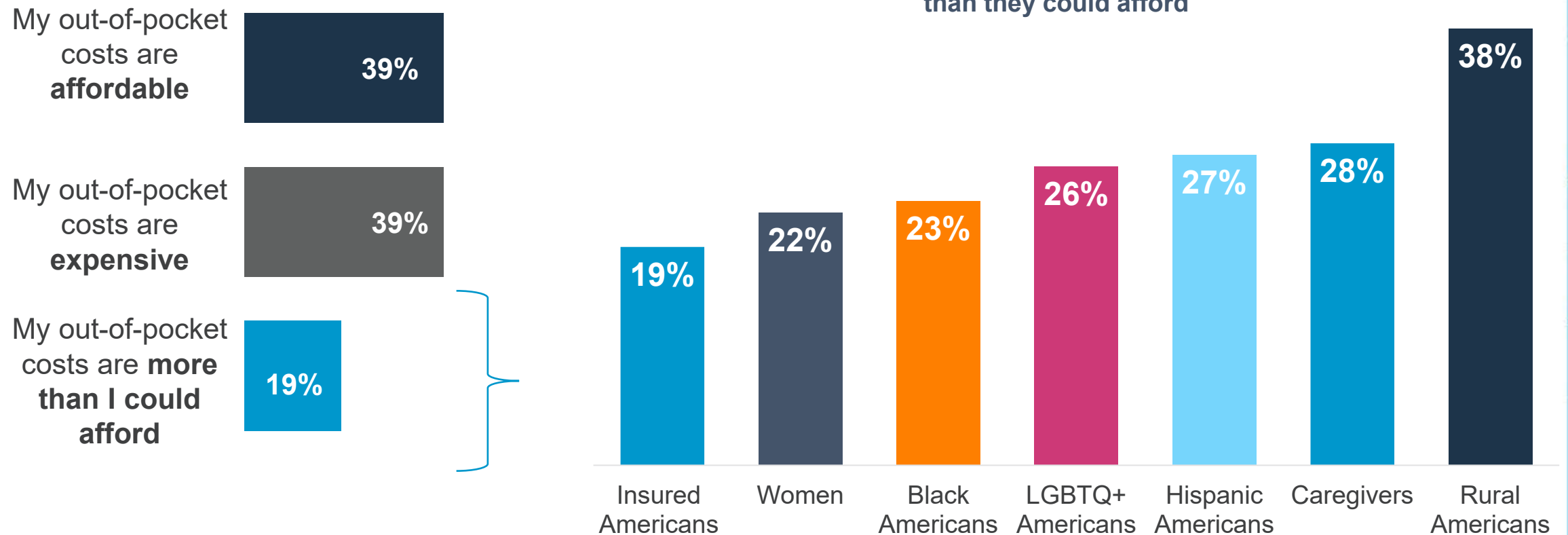
% selected as most important health care issue



Q: From the following list, which health care issue is most important to you? You may select up to two. (Note: only top items displayed)

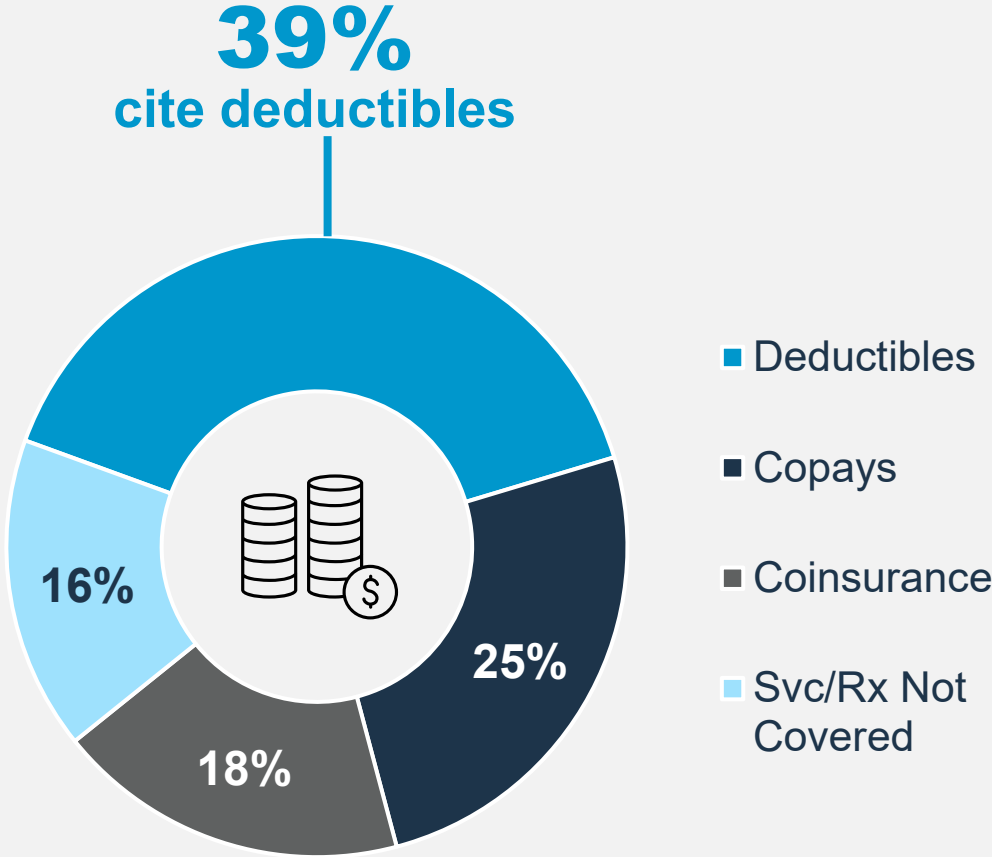
One in Five Americans Feel Unable to Afford OOP Costs, Even With Insurance

% who self-report their health care **out-of-pocket costs are more than they could afford**



Deductibles are Most Common Cost Burden

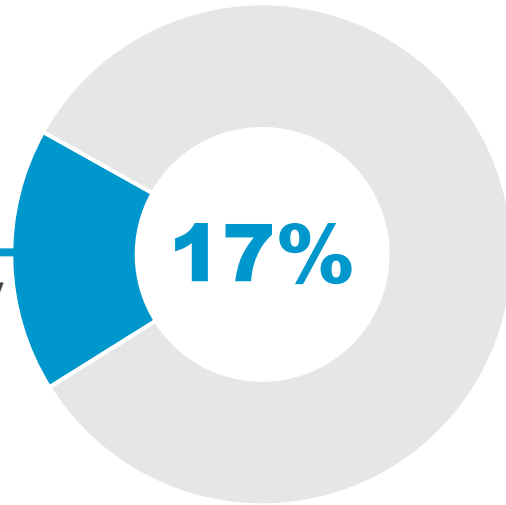
Reasons insured Americans find it difficult to afford their OOP costs



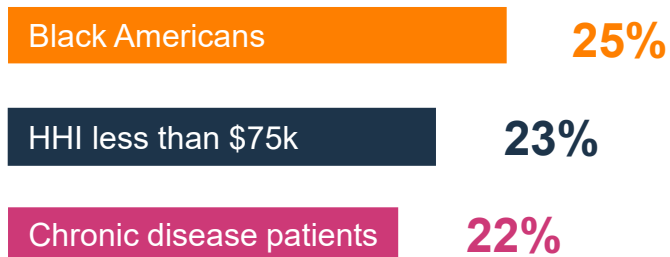
Too Many Insured Americans are Saddled With Medical Debt

Debt

% “yes” to having any outstanding debt for medical expenses

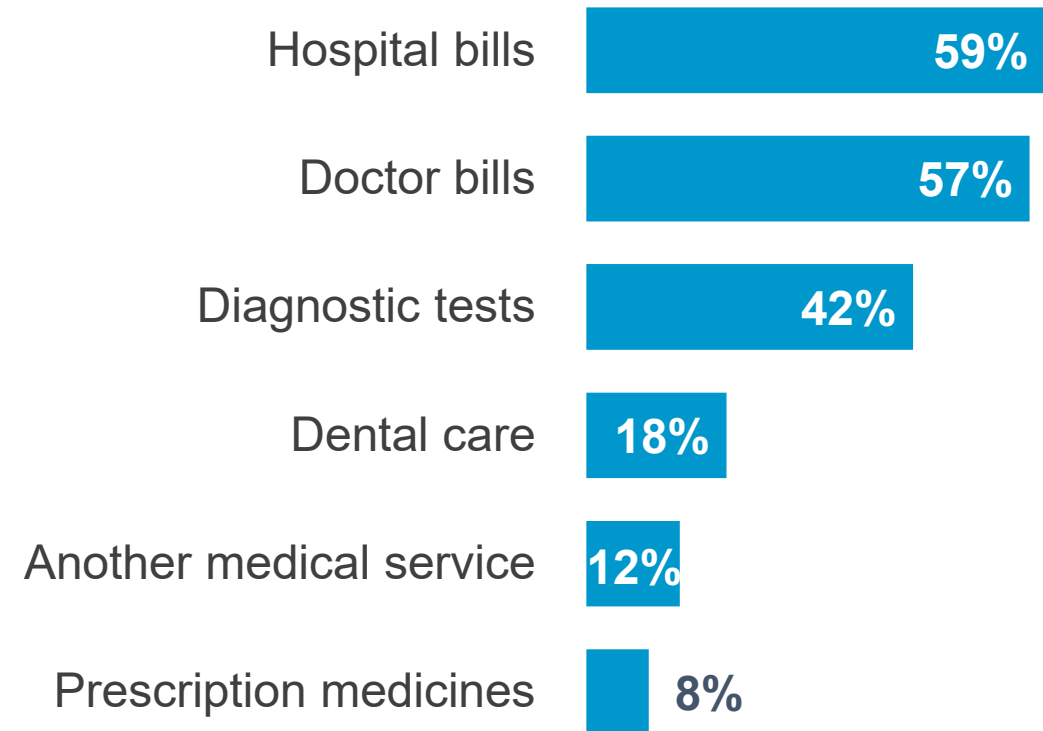


Notable Subgroups



Q: Do you currently have any outstanding debt for medical expenses?

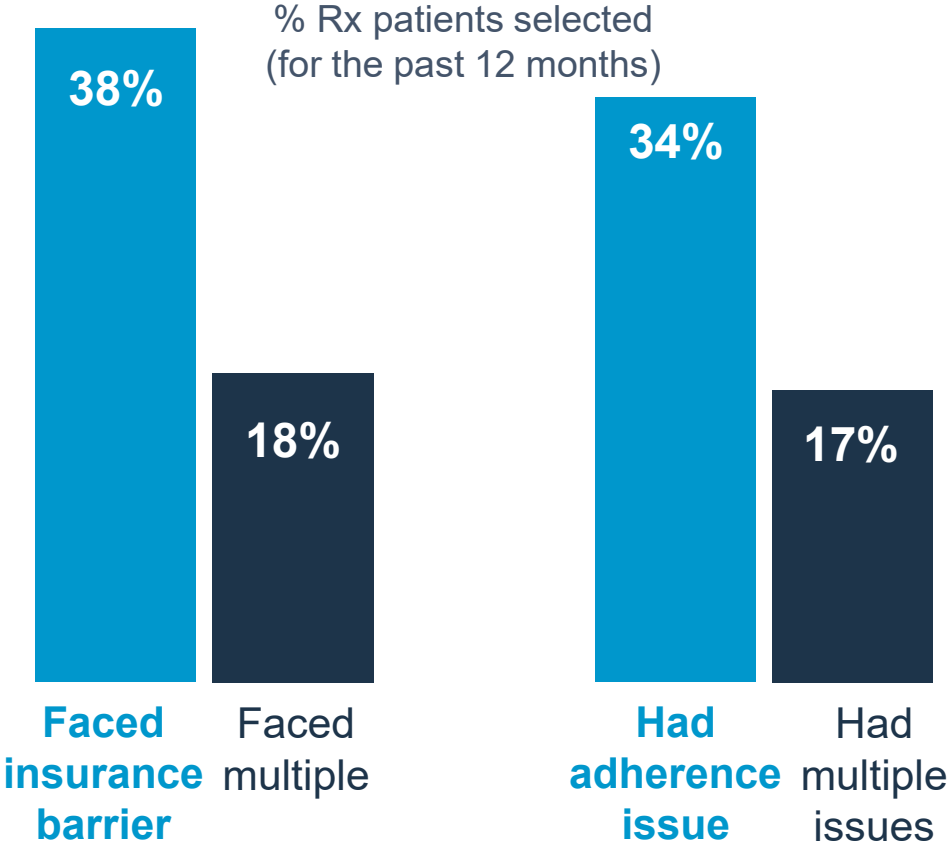
% selected as part of outstanding medical debt



Q: Which health care expenses do you owe money for as part of your total outstanding medical debt? (Note: not all items displayed)

Insurers and PBMs Regularly Restrict and Delay Access

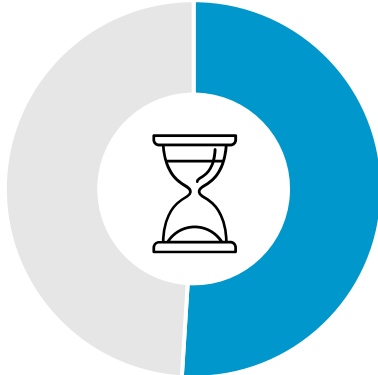
Insurance Barriers and Adherence Incidence



Concern Around Insurance Barriers



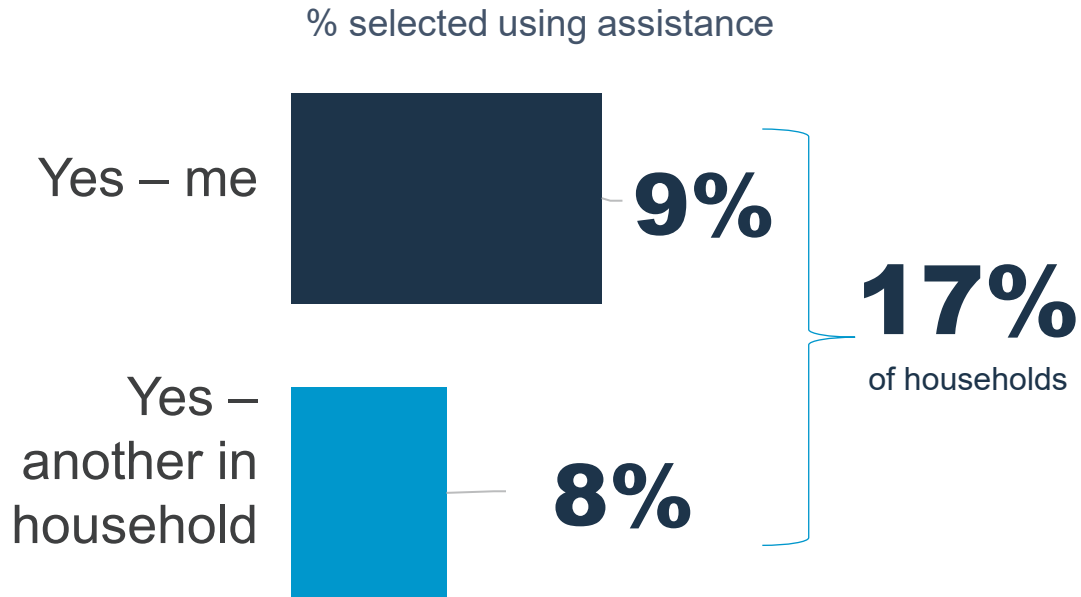
56%
of Rx patients are concerned a doctor-prescribed medicine *wouldn't be covered*



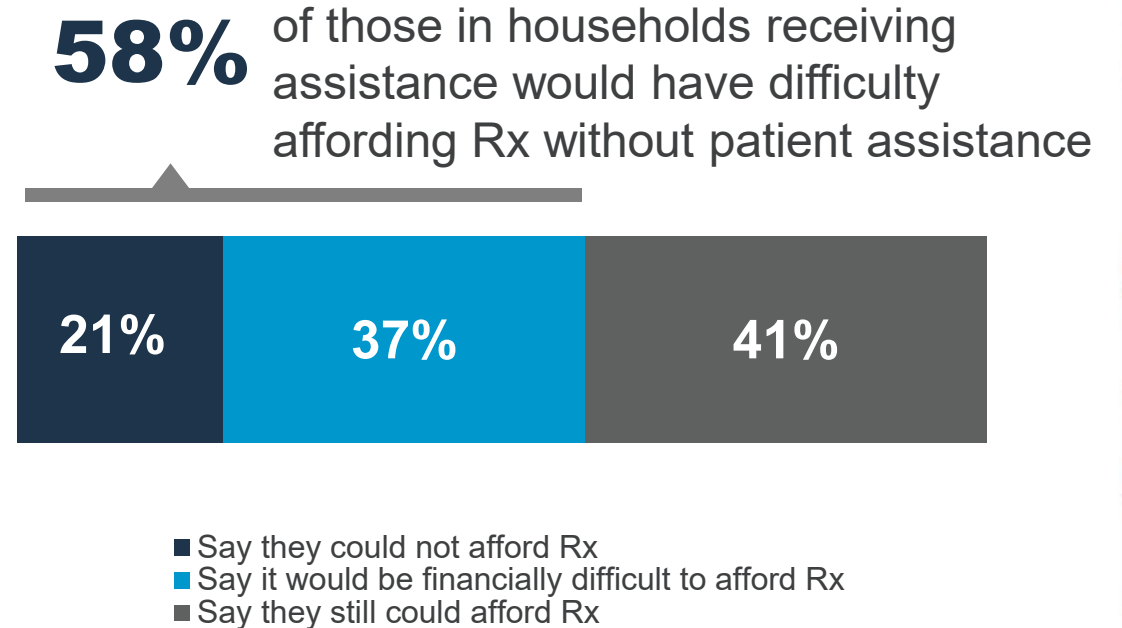
51%
of Rx patients are concerned they would *have to wait for their insurer to provide prior authorization*

Q: Have any of the following happened to you or your family over the past year (12 months)?

Accumulator Adjustment Programs Put Medicines Financially Out of Reach for Many

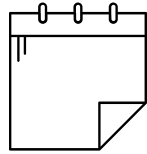


Q: In the last two years have you or a member of your household used patient cost-sharing assistance, such as a copay coupon from a pharmaceutical company, to reduce your prescription medicine out-of-pocket costs?



Q: If the patient cost-sharing assistance, such as a copay coupon, that you/your family member received did not count towards your deductible, would you still be able to afford your medication(s) once the patient cost-sharing assistance for those medicines is exhausted?

Insurer- and PBM-Imposed Practices Impact Patient Outlooks



53%

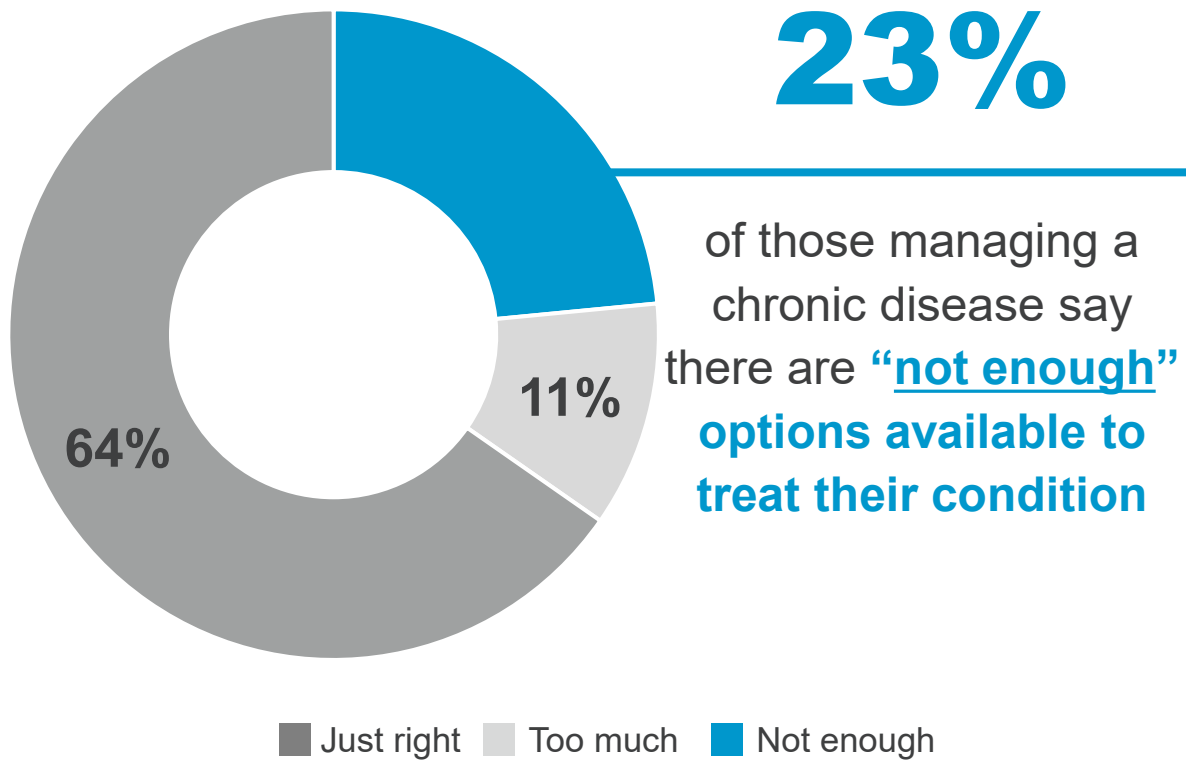
of insured Americans
**can't anticipate what
they'll pay for health care
services** even if they are
covered by their health
insurance plan

Those who are:

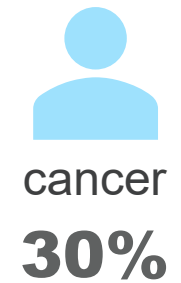
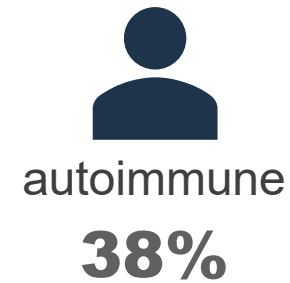
- Aged 18 – 44 (60%)
- LGBTQ+ (60%)
- Parents (58%)
- In commercial insurance (57%)

are more likely to say they can't
anticipate what they'll pay for services

Patients Want More Innovation; Nearly a Quarter Say There Aren't Enough Options to Treat Their Condition

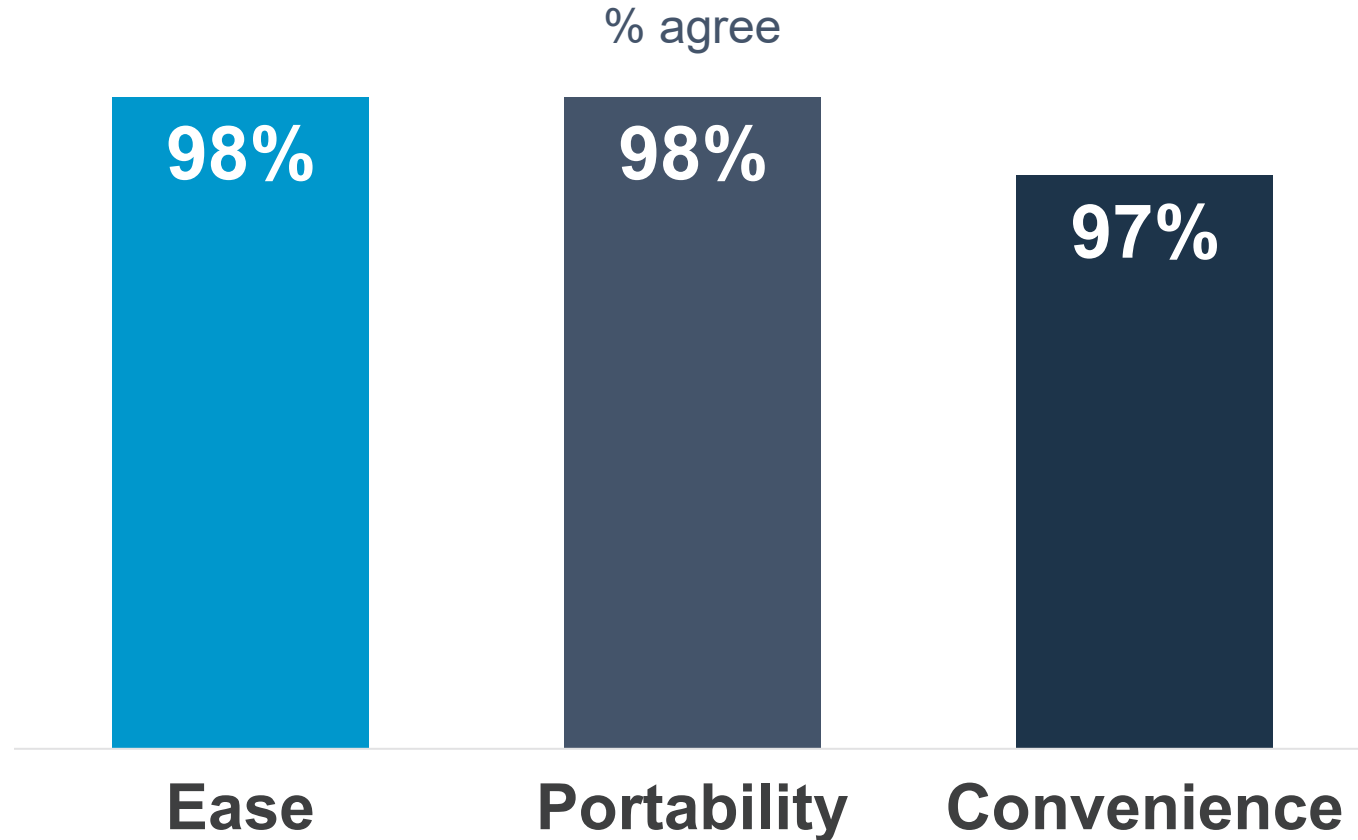


% say “not enough” among patients managing conditions



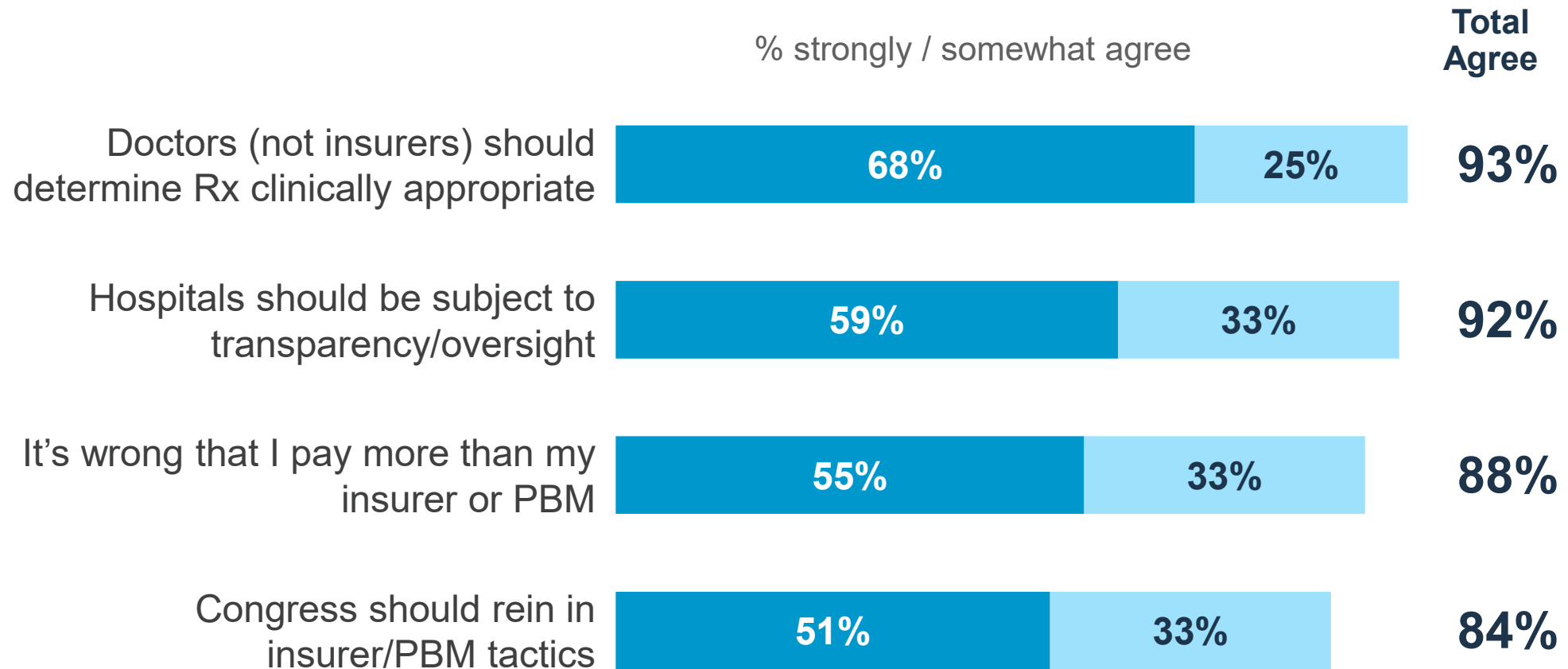
Q: Thinking about any health condition(s) that you manage, how would you characterize the availability of medicines that treat your condition?

Patients Value Innovation; Rx Patients See Multiple Benefits in Pill and Tablet Medicines



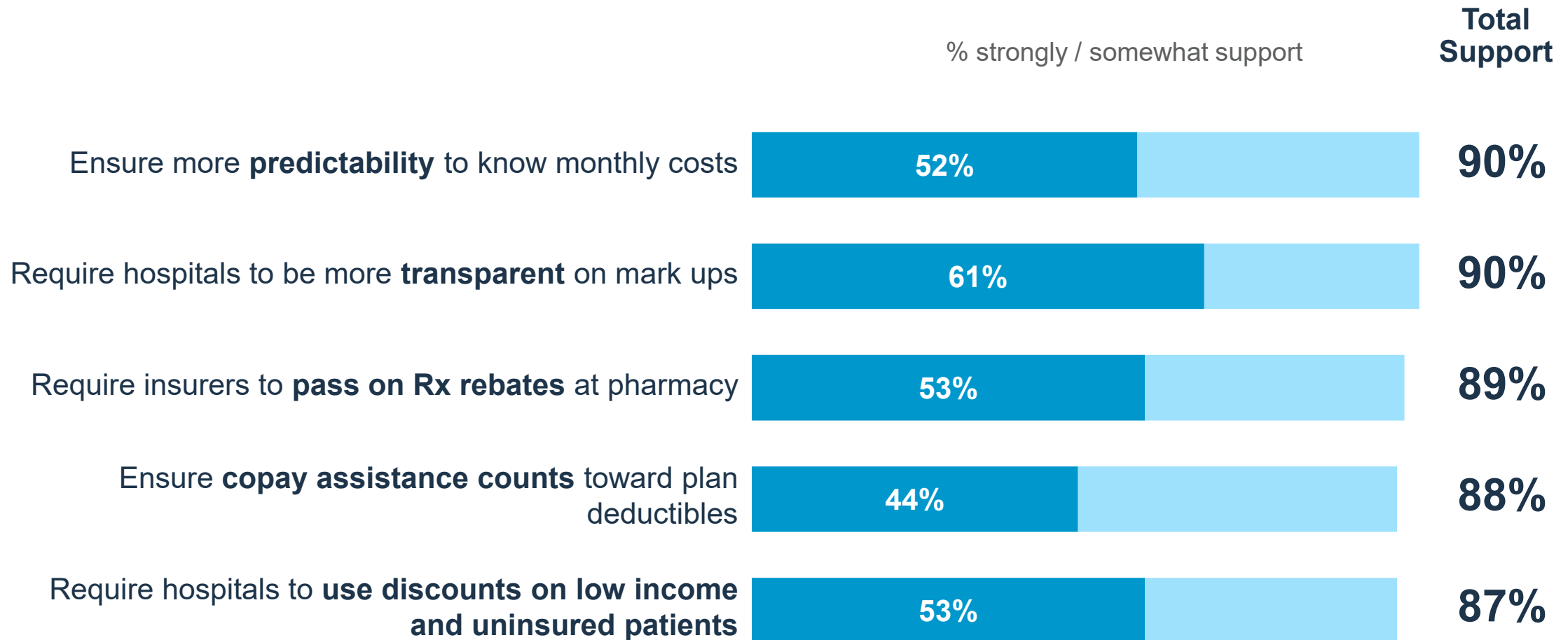
Q: Thinking about the prescription medicine(s) you take in pill or tablet form...Please indicate if you strongly agree, somewhat agree or strongly disagree with each of the following statements...

Americans Want More Accountability in Health Care



Q: For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.

Americans Overwhelmingly Support Patient-Centered Policy



Approach and Methodology



Ipsos KnowledgePanel®

Nationally representative panel
across all 50 states

n=5,152 Americans (4,823 insured)

Fielded April 2023

Fielded in English and Spanish



Learn more at
phrma.org/middlemen and phrma.org/polling CONFIDENTIAL