

PBMs
Online Survey
February 6-13, 2023

N = 1,049 likely voters nationwide

FINAL WEIGHTED

NATIONAL
Weighted N= 1000
Unweighted N= 1049

Q1. What is your gender?

Select one

Man	46
Woman	52
Nonbinary	1
Prefer to self-describe [SPECIFY].....	0
Prefer not to answer	0

Q2. In which state are you registered to vote?

Select one

New England	5
Middle Atlantic	13
East North Central	15
West North Central	7
South Atlantic	20
East South Central.....	6
West South Central.....	11
Mountain.....	8
Pacific.....	15
Northeast.....	18
Midwest.....	22
South.....	37
West	23

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Q3. What is your age?

Enter a number [**TERMINATE IF UNDER 18**]

Q4. [IF PREFER NOT TO ANSWER]: Please select your age from the categories below.

Select one

Under 30..... 16
 30 - 39 17
 40 - 49 16
 50 - 64 26
 65 & over 25

Under 18 years [**TERMINATE**]
 18-24 years..... 8
 25-29 years..... 8
 30-34 years..... 9
 35-39 years..... 8
 40-44 years..... 10
 45-49 years..... 6
 50-54 years..... 9
 55-59 years..... 9
 60-64 years..... 8
 65-69 years..... 11
 70-74 years..... 8
 Over 74 years 7
 (Don't know /Refused) 0

Q5. Just to make sure we have a representative sample, please choose one or more of these racial or ethnic groups that you identify with. [**RANDOMIZE CHOICES**]

Select all that apply

White or Caucasian 67
 Black or African American..... 13
 Latino/Latina or Hispanic 11
 Asian American or Pacific Islander..... 5
 Native or Indigenous American 3
 Middle Eastern..... 1
 None of these/Other 4

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Q6. Generally speaking, do you think of yourself as a Republican, a Democrat, an independent, or something else?
 Select one

Q7. [IF DEMOCRAT] Do you consider yourself a strong or a not-so-strong Democrat?
 Select one

Q8. [IF REPUBLICAN] Do you consider yourself a strong or a not-so-strong Republican?
 Select one

Q9. [IF INDEPENDENT] Towards which party do you lean, even a little bit?
 Select one

Strong Democrat	24
Not-so-strong Democrat	12
Independent - lean Democrat	6
Democrat	42
Independent.....	12
Republican.....	39
Independent - lean Republican	9
Not-so-strong Republican	10
Strong Republican	20
Other	1
Not sure	4
Prefer not to answer	2

Q10. What is the last year of schooling that you have completed?
 Select one

Non-college grad	58
College grad	41
1st - 11th grade.....	3
High school graduate.....	20
Vocational or technical school.....	3
Some college but no degree	21
Associate’s degree	12
4-year college graduate or bachelor’s degree	27
Graduate school or advanced degree	14
(Refused).....	1

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Q11. Which of the following best describes your current employment status?
 Select one

Employed full time42
 Employed part time..... 11
 Unemployed9
 Homemaker or stay at home parent.....6
 Student3
 Retired.....28
 Prefer not to answer 1

Q12. [IF EMPLOYED] Which of the following categories best describes your industry?
 Select one

Education..... 11
 Retail 11
 Health Care & Pharmaceutical..... 10
 Manufacturing.....9
 Hospitality & Food Services 7
 Finance, Insurance, & Economics..... 7
 Computers, Science, & Technology 6
 Construction & Mining.....5
 Transportation & Warehousing 4
 Administrative & Business Support 4
 Consulting.....2
 Real Estate2
 Arts, Entertainment & Recreation.....2
 Communications & Marketing 1
 Agriculture, Forestry, Fishing & Hunting..... 1
 Media & Information..... 1
 Other [SPECIFY]..... 18

Q13. When was your most recent trip to a doctor or physician? Just your best estimate is fine.
 Select one

Less than 1 year ago 71
 1-2 years ago..... 14
 More than 2 years ago 12
 Not sure.....2
 Prefer not to answer 1

Q14. Do you currently have health insurance?
 Select one

Yes 87
 No 10
 Not sure.....2
 Prefer not to answer 1

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Q15. [IF YES] From which one of these sources do you get your main health insurance coverage – from your employer, a union, your parent’s or spouse’s employer, a private plan you pay for yourself, Medicaid, Medicare, Veterans Affairs (the V.A.), or through the Marketplace/Affordable Care Act (ACA)/Obamacare?

Select one

Employer	31
Medicare.....	30
Medicaid	14
Parent's/spouse's employer	10
Private	6
Marketplace/ACA/Obamacare	4
Veteran's Affairs (VA)	2
Union	1
Other [SPECIFY].....	1
Not sure.....	1

Q16. How often do you typically take prescription drugs? Just your closest estimate is fine.

Select one

Every day.....	55
Once a month or more	10
A few times a year	10
Once a year or less.....	20
Not sure.....	6

Q17. Here are some groups of people and organizations. For each, please indicate whether you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable impression of that person or thing. If you haven't heard of something, or if you don't know enough about it to have an impression, just indicate that.

[RANDOMIZE]

Select one for each option

Sorted by “Very favorable”

17a.Doctors	39
17f.Pharmacists	35
17d.Hospitals.....	29
17b.Health insurance companies.....	18
17g.The health care system in the United States	16
17e.Pharmacy benefit managers (PBMs).....	15
17c.Pharmaceutical (prescription drug) companies	15

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a. Doctors

Very Favorable..... 39
 Somewhat Favorable 40
 Somewhat Unfavorable..... 11
 Very Unfavorable 4
 No Opinion..... 6
 Never Heard 1

Favorable..... 79
 Unfavorable 15

b. Health insurance companies

Very Favorable..... 18
 Somewhat Favorable 38
 Somewhat Unfavorable..... 22
 Very Unfavorable 14
 No Opinion..... 8
 Never Heard 1

Favorable..... 56
 Unfavorable 36

c. Pharmaceutical (prescription drug) companies

Very Favorable..... 15
 Somewhat Favorable 32
 Somewhat Unfavorable..... 24
 Very Unfavorable 19
 No Opinion..... 9
 Never Heard 1

Favorable..... 46
 Unfavorable 43

d. Hospitals

Very Favorable..... 29
 Somewhat Favorable 43
 Somewhat Unfavorable..... 16
 Very Unfavorable 6
 No Opinion..... 6
 Never Heard 1

Favorable..... 72
 Unfavorable 22

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- e. Pharmacy benefit managers (PBMs)
 - Very Favorable..... 15
 - Somewhat Favorable 25
 - Somewhat Unfavorable..... 15
 - Very Unfavorable 8
 - No Opinion..... 19
 - Never Heard 18

 - Favorable..... 40
 - Unfavorable 23

- f. Pharmacists
 - Very Favorable..... 35
 - Somewhat Favorable 45
 - Somewhat Unfavorable..... 9
 - Very Unfavorable 4
 - No Opinion..... 8
 - Never Heard 1

 - Favorable..... 79
 - Unfavorable 12

- g. The health care system in the United States
 - Very Favorable..... 16
 - Somewhat Favorable 34
 - Somewhat Unfavorable..... 23
 - Very Unfavorable 19
 - No Opinion..... 7
 - Never Heard 1

 - Favorable..... 50
 - Unfavorable 42

Q18. Overall, do you think the cost of prescription drugs is too high, too low, or about right?
 Select one

- Too high 75
- Too low 3
- About right 15
- Not sure 7

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Q19. How much do you know about pharmacy benefit managers (PBMs)?
 Select one

- A great deal 8
- Some 15
- A little 23
- Nothing at all 48
- Not sure 7

Q20. Now here is some information about a sector of the health insurance industry called pharmacy benefit managers:

Pharmacy benefit managers, or PBMs, are corporations that administer prescription drug plans for health insurance companies and employer or union health plans, and make profits based on the price of prescription drugs.

Having read this description, how important do you think it is to have rules that require pharmacy benefit managers (PBMs) to provide value and lower drug costs to consumers?

Select one

- Very Important 57
- Somewhat Important 27
- Not too Important 5
- Not at all Important 3
- Not sure 8

- Very/Somewhat Important 84
- Not too/ Not at all Important 8

Now here is some more information about pharmacy benefit managers (PBMs):

PBMs were created to manage how we get our prescription drugs and create savings for consumers. Today, a number of PBMs are multibillion dollar corporations, and some of the most profitable companies in health care.

PBMs play a major role in determining how much we pay for our medications, because they negotiate prescription drug benefits on behalf of health insurance companies and employer health insurance plans. PBMs have little oversight and little competition - right now, three PBMs control over 80% of the prescription drug market in the United States - so they are able to profit through a number of business practices. PBMs make a bigger profit on drugs with a higher price tag because PBM fees are often charged based on a percentage of the price, so many experts have said that PBMs prefer higher, rather than lower drug prices.

PBMs also negotiate with prescription drug manufacturers to get rebates and other fees on these drugs, but instead of passing savings back to consumers, often they keep these savings for themselves. They also often prevent patients from getting lower-cost generic drugs and block patient access to drug manufacturer copay assistance programs.

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Q21. Having read this description, do you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable impression of pharmacy benefit managers?

Select one

Very Favorable	14
Somewhat Favorable	22
Somewhat Unfavorable.....	18
Very Unfavorable	34
No Opinion.....	10
Never Heard	2
Favorable.....	36
Unfavorable	52

Q22. Having read the previous description, how important do you think it is to have rules that require pharmacy benefit managers (PBMs) to provide value and lower drug costs to consumers?

Select one

Very Important	60
Somewhat Important.....	27
Not too Important	5
Not at all Important	4
Not sure.....	5
Very/Somewhat Important	86
Not too/Not at all Important	8

Q23. Now here are some different policy changes that have been proposed to regulate PBMs. For each one, please indicate if you would favor or oppose the proposal. **[RANDOMIZE]**

Select one for each option

Sorted by “Favor - strongly”

23g.Require PBMs to pass discounts along to patients that they get from negotiating with prescription drug manufacturers	56
23c.Change how PBMs profit so it’s not connected to the price of prescription drugs and they are not incentivized to drive up prices for patients	56
23a.Require PBMs to get the best possible deal for health plan sponsors (such as employers), which would lower patients’ costs.....	55
23b.Introduce more transparency into PBMs’ contracts and the prescription drug pricing process.....	54

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- 23d. Require more consistency in out-of-pocket prescription drug costs so patients know what they can expect to pay at the pharmacy counter 53
- 23e. Require that insurance plans (like employer health plans) pay PBMs only a simple flat fee for their services, prohibiting PBMs from charging additional fees that ultimately get passed on to patients 51
- 23f. Introduce more competition into the marketplace for PBMs, so they have to offer competitive prices to get contracts, ultimately lowering prices for plan sponsors (such as employers) and patients 49
- 23h. Require that PBMs count copay assistance programs (such as coupons) toward meeting patient deductibles or out-of-pocket limits, to help make prescriptions more affordable for patients 48

- a. Require PBMs to get the best possible deal for health plan sponsors (such as employers), which would lower patients’ costs.
 - Favor - strongly 55
 - Favor - somewhat 26
 - Oppose - somewhat 6
 - Oppose - strongly 2
 - Not Sure 10

 - Favor 81
 - Oppose 8

- b. Introduce more transparency into PBMs’ contracts and the prescription drug pricing process.
 - Favor - strongly 54
 - Favor - somewhat 27
 - Oppose - somewhat 6
 - Oppose - strongly 2
 - Not Sure 11

 - Favor 81
 - Oppose 8

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c. Change how PBMs profit so it's not connected to the price of prescription drugs and they are not incentivized to drive up prices for patients.

Favor - strongly 56
 Favor - somewhat 25
 Oppose - somewhat 6
 Oppose - strongly 2
 Not Sure 11

Favor 81
 Oppose 8

d. Require more consistency in out-of-pocket prescription drug costs so patients know what they can expect to pay at the pharmacy counter.

Favor - strongly 53
 Favor - somewhat 27
 Oppose - somewhat 8
 Oppose - strongly 3
 Not Sure 9

Favor 80
 Oppose 10

e. Require that insurance plans (like employer health plans) pay PBMs only a simple flat fee for their services, prohibiting PBMs from charging additional fees that ultimately get passed on to patients.

Favor - strongly 51
 Favor - somewhat 29
 Oppose - somewhat 7
 Oppose - strongly 2
 Not Sure 11

Favor 80
 Oppose 9

f. Introduce more competition into the marketplace for PBMs, so they have to offer competitive prices to get contracts, ultimately lowering prices for plan sponsors (such as employers) and patients.

Favor - strongly 49
 Favor - somewhat 29
 Oppose - somewhat 8
 Oppose - strongly 3
 Not Sure 11

Favor 78
 Oppose 10

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g. Require PBMs to pass discounts along to patients that they get from negotiating with prescription drug manufacturers.

Favor - strongly 56
 Favor - somewhat 26
 Oppose - somewhat 6
 Oppose - strongly 2
 Not Sure 9

Favor 82
 Oppose 9

h. Require that PBMs count copay assistance programs (such as coupons) toward meeting patient deductibles or out-of-pocket limits, to help make prescriptions more affordable for patients.

Favor - strongly 48
 Favor - somewhat 31
 Oppose - somewhat 7
 Oppose - strongly 3
 Not Sure 12

Favor 79
 Oppose 10

Q24. Now here are some facts about how PBMs operate and different impacts they can have on patients' health care costs and the cost of the entire health care system. For each one, please rate how concerned you are about that issue or impact. **[RANDOMIZE]**

Select one for each option

Sorted by “Very concerned”

- 24a.PBMs drive up prescription drug prices 57
- 24e.PBMs hold a monopoly on the prescription drug market, allowing them to make unilateral decisions on prices 55
- 24d.There is little oversight or regulation of PBMs 54
- 24f.PBMs decide which drugs are available to consumers 54
- 24b.PBMs exclude cheaper, generic drugs from our insurance plans 53
- 24c.PBMs block patient access to drug manufacturer copay assistance programs..... 51
- 24i.PBMs reduce patients’ choice in prescription drugs and pharmacies 51
- 24h.PBMs often own their own pharmacies and drive out

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independent, community drug stores 49
 24g. Three PBMs – CVS Caremark,
 ExpressScripts, and OptumRX –
 control over 80% of the prescription
 drug market in the U.S 45

a. PBMs drive up prescription drug prices.
 Very concerned..... 57
 Somewhat concerned 21
 A little concerned 10
 Not at all concerned 3
 Not sure 8

 Very/Somewhat concerned 79
 A little/Not at all concerned..... 13

b. PBMs exclude cheaper, generic drugs from our insurance plans.
 Very concerned..... 53
 Somewhat concerned 24
 A little concerned 10
 Not at all concerned 5
 Not sure 8

 Very/Somewhat concerned 77
 A little/Not at all concerned..... 15

c. PBMs block patient access to drug manufacturer copay assistance programs.
 Very concerned..... 51
 Somewhat concerned 26
 A little concerned 10
 Not at all concerned 5
 Not sure 9

 Very/Somewhat concerned 77
 A little/Not at all concerned..... 14

d. There is little oversight or regulation of PBMs.
 Very concerned..... 54
 Somewhat concerned 24
 A little concerned 10
 Not at all concerned 3
 Not sure 9

 Very/Somewhat concerned 78
 A little/Not at all concerned..... 13

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e. PBMs hold a monopoly on the prescription drug market, allowing them to make unilateral decisions on prices.

Very concerned.....55
 Somewhat concerned23
 A little concerned9
 Not at all concerned4
 Not sure9

Very/Somewhat concerned78
 A little/Not at all concerned.....13

f. PBMs decide which drugs are available to consumers.

Very concerned.....54
 Somewhat concerned24
 A little concerned10
 Not at all concerned4
 Not sure8

Very/Somewhat concerned78
 A little/Not at all concerned.....14

g. Three PBMs – CVS Caremark, ExpressScripts, and OptumRX – control over 80% of the prescription drug market in the U.S.

Very concerned.....45
 Somewhat concerned29
 A little concerned12
 Not at all concerned5
 Not sure9

Very/Somewhat concerned74
 A little/Not at all concerned.....17

h. PBMs often own their own pharmacies and drive out independent, community drug stores.

Very concerned.....49
 Somewhat concerned26
 A little concerned12
 Not at all concerned4
 Not sure9

Very/Somewhat concerned75
 A little/Not at all concerned.....16

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i. PBMs reduce patients’ choice in prescription drugs and pharmacies.

Very concerned.....	51
Somewhat concerned	26
A little concerned	11
Not at all concerned	4
Not sure	9
 Very/Somewhat concerned	 76
A little/Not at all concerned.....	15

Q25. When you think about priorities for Congress and your state legislature, how high of a priority do you think regulating PBMs should be?

Select one

A top priority	28
A high priority.....	45
Somewhat of a priority	19
Not a priority at all.....	3
Not sure.....	5
 A Top/High priority	 73
Somewhat/not a priority	21

Q26. Would you be more likely to vote for a candidate for elected office who supports regulating PBMs, or a candidate who supports keeping the rules as they are?

Select one

Supports regulating PBMs – much more likely	38
Supports regulating PBMs – somewhat more likely	34
Supports keeping rules as they are – somewhat more likely	9
Supports keeping rules as they are – much more likely	3
Makes no difference to my vote	7
Not sure.....	9
 Regulate PBMS	 72
Keep rules	12