

PATIENT PRACTITIONER RESEARCH

PhRMA

March 2025



Methodology



Field Period



General
Public

January 7-14, 2025



Sample & Mode

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



Qualifications

Total sample of n=1,702 adults ages 18+



Health Care
Practitioners

January 8-10, 2025

A companion survey of U.S. healthcare practitioners was conducted online using established b2b panels

A total sample of 408 Health Care Practitioners who had to be working in the health care sector – primarily doctors and nurses – and spend at least 25% of their time with patients*

*Could not have ties (self or family, full- or part-time) with the FDA, a pharmaceutical or biotech manufacturing company, a market research, public relations, advertising firm, or a health care consulting firm

Executive Summary

State Of Affairs

Assessments of our nation's health care quality are fairly strong, especially among Health Care Practitioners. Still, there is a sense among some that conditions are worsening and that the complexity of our system is to blame.

Patient-Practitioner Relationships

Americans overwhelmingly trust health care professionals to act in their best interest – and appreciate their help in working through insurance-related issues.

However, a majority wish their practitioners could spend more time with them during visits.

Practitioners echo this view and

sound the alarm on administrative hoops and HCP burnout.

Insurance

Overwhelming majorities of Practitioners must adjust care plans to avoid insurance restrictions and worry that their patients avoid seeking care. Americans feel the sting of high-cost Rx medicines, with more than half worrying that their insurer will deny necessary medicines. Both groups believe that insurance companies leverage complexity as a means of improving their bottom line.

Meanwhile, half of Americans have experienced prior authorization, an insurer UM tactic that Practitioners would like to see go away.

Reform

Standing in sharp contrast to assessments of quality of care in the U.S., views of cost are quite negative: the U.S. is seen as one of the worst places, if not the worst place, to live when it comes to cost of care. Both audiences want to see doctors in the driver's seat in determining what treatments are clinically appropriate, as well as more affordable insurance options. There is broad support for checks on insurers and PBMs.



Key Demographics: General Public



Age

18-44	46%
45-64	31%
65+	23%



Party ID

Republican	29%
Democrat	31%
Independent/Other	40%



Patient Characteristics

Takes prescription medicines	25%
Chronic disease patient	15%
Has medical debt	17%



Gender

Male	49%
Female	51%



Urbanicity

Rural	19%
Suburban	44%
Urban	37%



Race/Ethnicity

White (non-Hispanic)	61%
Black (non-Hispanic)	12%
Hispanic	18%



Caregivers

(adult family member or friend)	10%
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HH income

Under \$75K	39%
\$75K+	61%



Insurance

Insured (net)	92%
Commercial	60%
Government	39%

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.

Key Demographics: Health Care Practitioners



Age

40 or less	52%
Over 40	47%



Practitioner Type

Doctor	50%
Nurse	34%
Other	16%



Gender

Male	46%
Female	51%



Care Setting

Community	71%
Academic / teaching	27%
<hr/>	
Office	62%
Hospital	37%



of years in practice

10 or less	54%
11 or more	46%

93% spend **75%+** of their time directly with patients

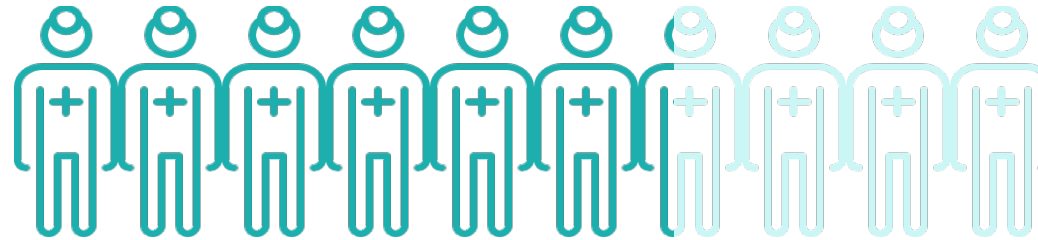
STATE OF AFFAIRS

#1

2 in 3 Health Care Practitioners, and nearly half of Americans, believe the U.S. is one of the best, if not the best, places to live for quality care

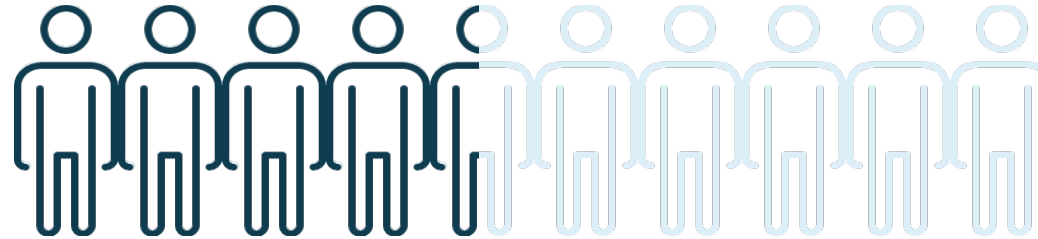
Rate the U.S. as one of **the best countries, if not THE best country** to live when it comes to the quality of health care treatments and services:

64%
Health care practitioners



Significantly higher than the General Public

45%
General Public



Significantly more likely to say the U.S. is as good a country as any or a worse country (54% vs. 36% of Practitioners)

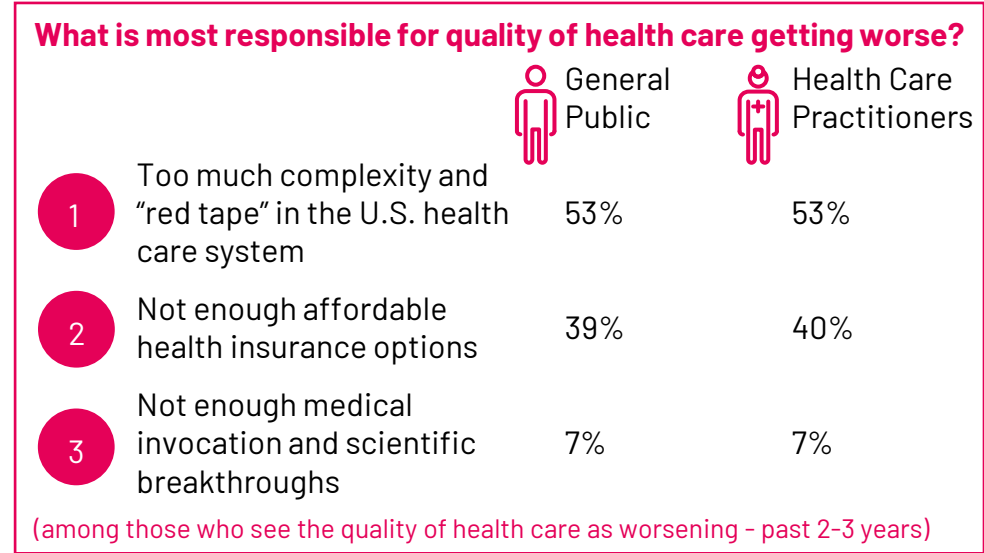
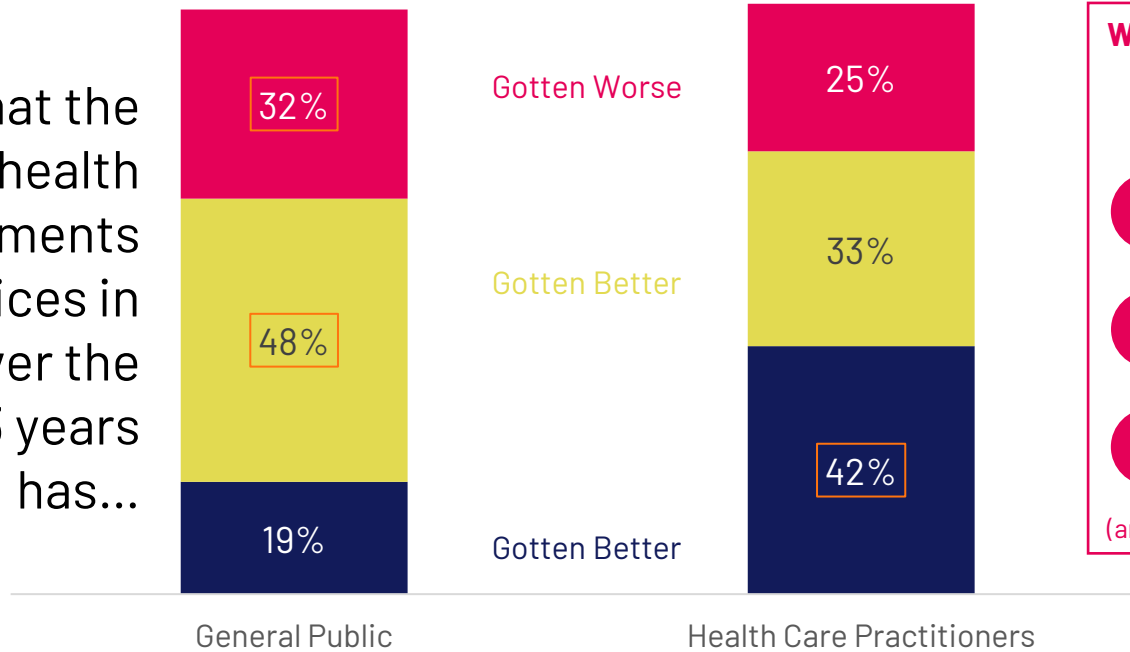
Positive sentiment climbs to 62% among seniors and 51% among rural Americans

A1_3. Quality of health care treatments / services - Thinking about each of the following areas, how you would describe the U.S. as a place to live?
Answer choices: the worst country to live in, one of the worst countries to live in, as good as any country to live in, one of the best countries to live in, the best country to live in
Base: Total Americans n=1702, seniors n=483, rural Americans n=334, Total Practitioners n=408

Yet, sizable shares see the quality of U.S. health care as worsening

Too much complexity / "red tape" is most to blame

Say that the quality of health care treatments and services in the U.S. over the last 2-3 years has...



A2_3. Quality of health care treatments / services - Over the last two-to-three years, how do you feel each of the following has changed in the U.S.?

Answer choices: gotten much worse, gotten a little worse, stayed about the same, gotten a little better, gotten much better

Base: Total Americans n=1702, Total Practitioners n=408

A3_3. Quality of health care treatments / services - And which ONE of the following do you feel is most responsible for each of these getting WORSE?

Answer choices: not enough affordable health insurance options, too much complexity and 'red tape' in the U.S. health care system, not enough medical innovation and scientific breakthroughs

Base: Those who feel that quality of health care treatments and services has worsened over the last 2-3 years, Americans n=526, Practitioners n=102

Statistically higher figure at the 95% confidence level

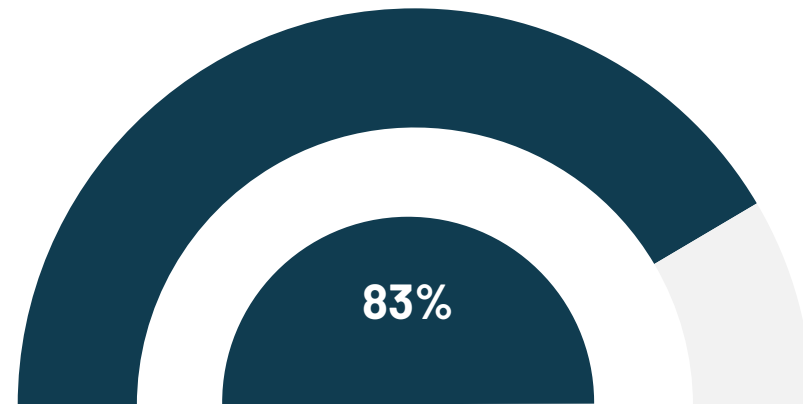
PATIENT- PRACTITIONER RELATIONSHIP

#2

More than 8 in 10 Americans trust Health Care Practitioners to act in their best interest



Trust doctors, nurses, and other health care professionals to act in the best interest of the American public:



Trust a great deal or somewhat
42% trust a great deal

Chronic disease patients (52%), Americans who take prescription medicines (48%), and seniors (59%) are among the most likely to place **a great deal of trust** in health care practitioners.

A4_sum2. Summary of Trust - To what extent do you feel you can trust each of the following to act in the best interest of the American public?
Answer choices: no trust at all, trust only a little, trust somewhat, trust a great deal, no opinion / not sure
Base: Total Americans n=1702, Chronic disease patients n=275, Rx patients n=458, seniors n=483

Helping with insurance-related issues is one way to build trust and make patients feel cared for

More than 8 in 10 Health Care Practitioners and insured Americans agree

% Strongly or somewhat agree that helping with insurance-related questions / issues...

 Health
Care
Practitioners

84%

Is one way for us to be good partners to our patients and build trust



General
Public
w/insurance

84%

Shows that my health care practitioner(s) care about me

Yet, there is **room for improvement** in terms of how often this is happening

44%

Is something that my health care practitioner(s) **often** help me with

C2_sum2. Summary of Agree - Next, please indicate how much you agree or disagree with each of the following statements about health insurance.
Answer choices: strongly disagree, somewhat disagree, somewhat agree, strongly agree
Base: Insured Americans n=1586, Total Practitioners n=408

But, Practitioners say that patients underestimate the number of hoops they have to jump through in providing care, and burnout is an issue



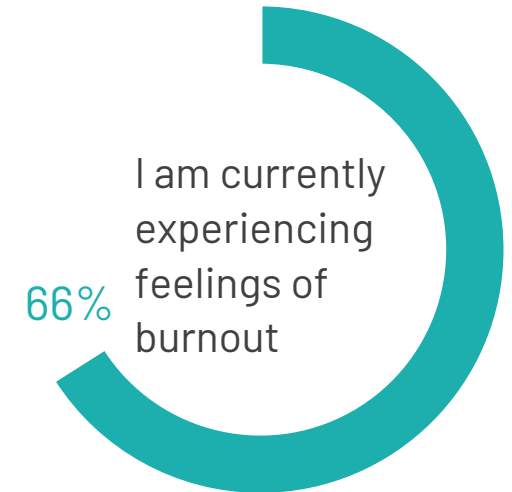
92%

Strongly or somewhat agree that that patients don't realize how many "hoops" health care professionals have to jump through in providing care (e.g., documentation / regulatory requirements, EHRs)

65% strongly agree



Strongly or somewhat agree that...



General Public

1 in 2 Americans sometimes worry that the health care professionals they see are feeling burned out (51%)

B12 & B13_sum2. Summary of Agree - These days, there is a lot of talk about employee burnout in the health care sector. Please indicate how much you agree or disagree with each of the following statements about burnout in your field.

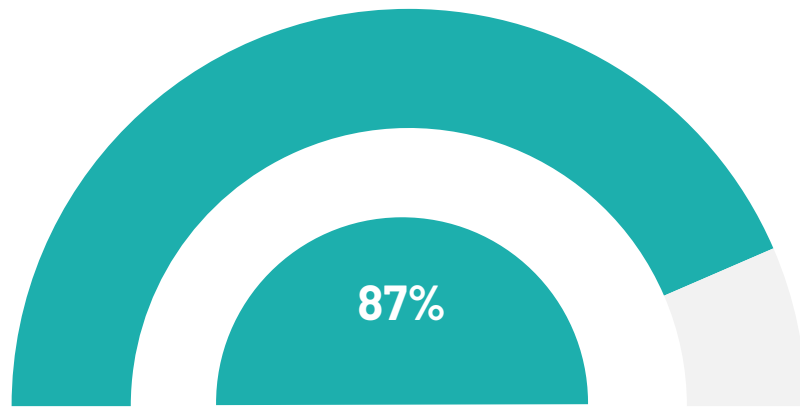
Answer choices: strongly disagree, somewhat disagree, somewhat agree, strongly agree

Base: Total Americans n=1702, Total Practitioners n=408

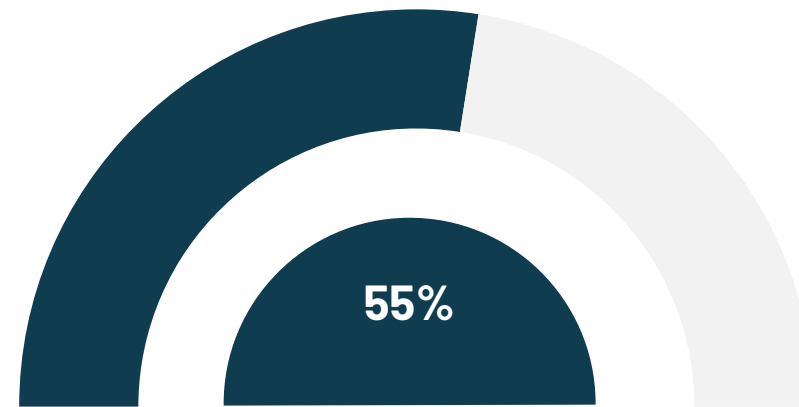
Majorities of both audiences wish there was more patient-focused time



Strongly or somewhat agree...



I wish I could spend more time focusing on providing quality care to my patients and less time on administrative tasks



I wish I my health care professionals could spend more time with me at appointments

B12 & B13_sum2. Summary of Agree - These days, there is a lot of talk about employee burnout in the health care sector. Please indicate how much you agree or disagree with each of the following statements about burnout in your field.
Answer choices: strongly disagree, somewhat disagree, somewhat agree, strongly agree
Base: Total Americans n=1702, Total Practitioners n=408

INSURANCE

#3

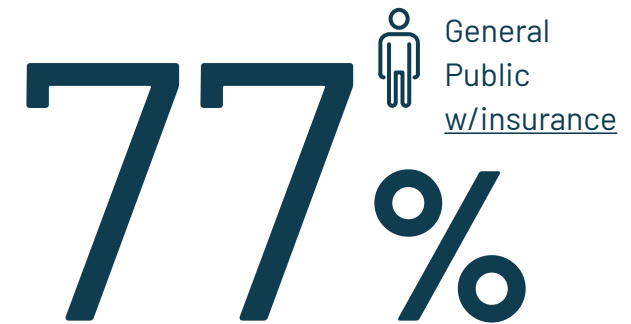
Large majorities of both Practitioners and insured Americans see insurance companies using complexity to increase profits

Agree strongly or somewhat that health insurers intentionally make coverage benefits complicated so they can increase their bottom line:



50% strongly agree

Both figures significantly higher than the General Public



31% strongly agree

Those more inclined to **agree strongly** include Americans ages 18-44 (36%), those with commercial insurance (35%), and those with medical debt (39%)

C2_sum2. Summary of Agree - Next, please indicate how much you agree or disagree with each of the following statements about health insurance.

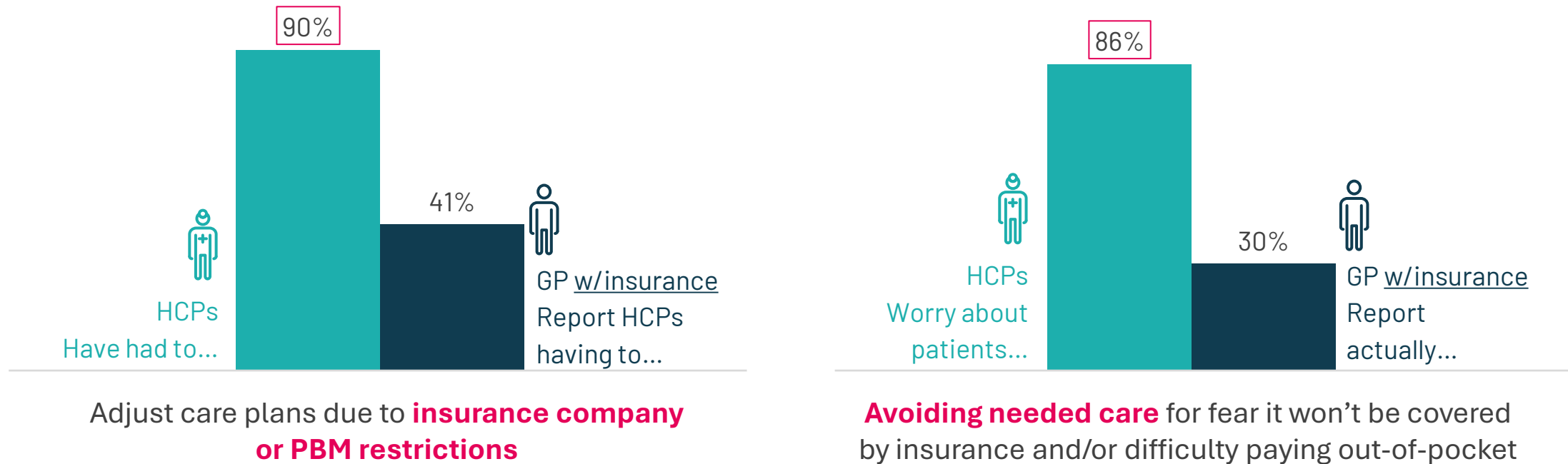
Answer choices: strongly disagree, somewhat disagree, somewhat agree, strongly agree

Base: Insured Americans n=1586, Ages 18-44 n=571, Those with commercial insurance n=1036, Those with medical debt n=237, Total Practitioners n=408

9 in 10 Practitioners have had to adjust care because of coverage restrictions; nearly as many worry their patients are avoiding care

Many insured American patients echo these experiences and concerns


% Strongly or somewhat agree



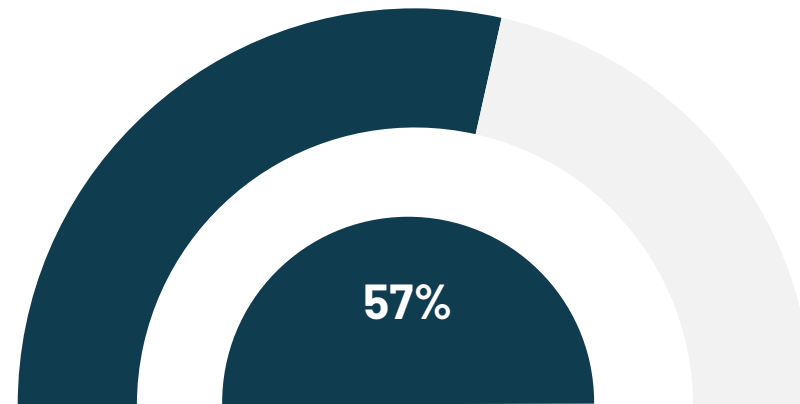
C2_sum2. Summary of Agree - Next, please indicate how much you agree or disagree with each of the following statements about health insurance.
 C10_sum2. Summary of Agree - Please indicate how much you agree or disagree with each of the following statements about health insurance company policies and practices.
 Answer choices: strongly disagree, somewhat disagree, somewhat agree, strongly agree
 Base: Insured Americans n=1586, Total Practitioners n=408

Statistically higher figure at the 95% confidence level

Nearly 6 in 10 insured Americans worry they will be denied necessary care due to insurance / PBM restrictions

 General Public
w/insurance

Are worried they won't be able to get the medicines they need because of insurance company or PBM restrictions:



Strongly or somewhat agree
19% strongly agree

Those more inclined to **agree strongly** include:


- Those who have already had their care plan adjusted due to insurance restrictions (34%)
- Those with medical debt (33%)
- Caregivers (27%)

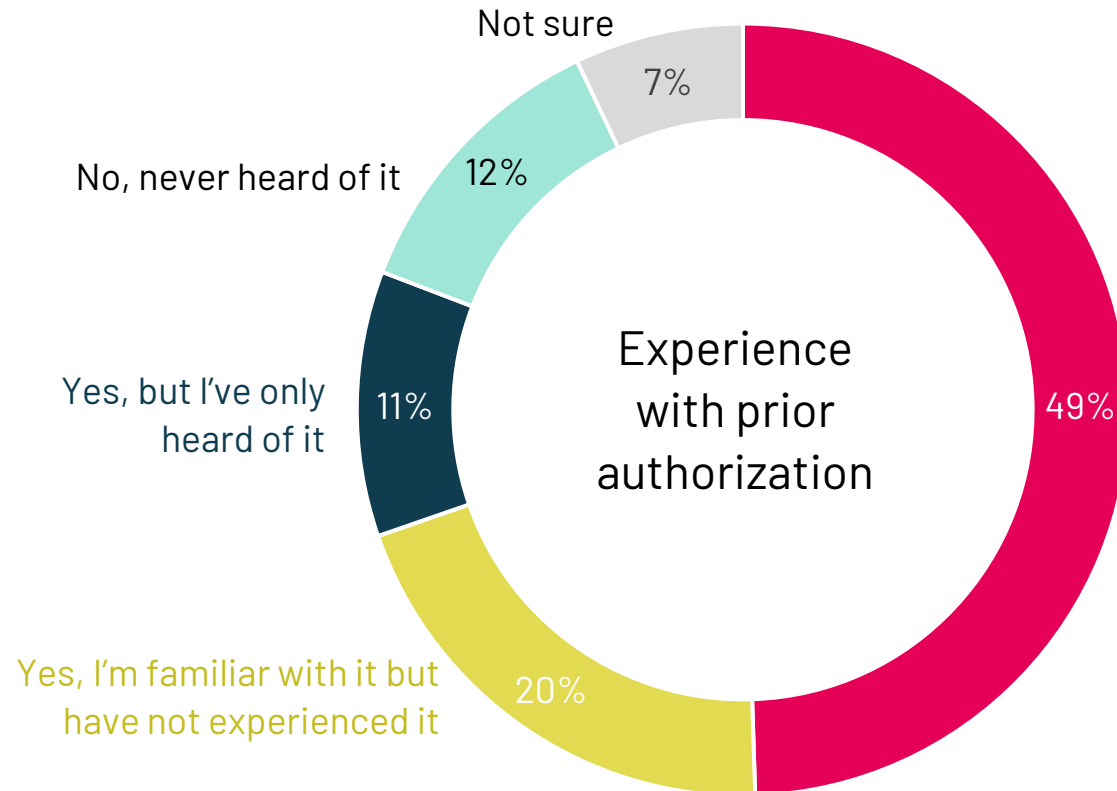
C10_sum2. Summary of Agree - Please indicate how much you agree or disagree with each of the following statements about health insurance company policies and practices.

Answer choices: strongly disagree, somewhat disagree, somewhat agree, strongly agree

Base: Insured Americans n=1586, Those who have had care plans adjusted due to insurance restrictions n=645, Those with medical debt n=237, Caregivers n=157

Half of insured Americans have experienced prior authorization

 General Public
w/insurance



Yes, I'm familiar with it and have experienced it

Those most likely to have experienced prior auth include:

- Chronic disease (58%) patients and those taking Rx medicines (55%)
- Caregivers (65%)
- Middle-aged Americans ages 45-64 (60%) and seniors (57%)

C3. Are you aware of the term "prior authorization" as it relates to insurance coverage of a medicine?*

Answer choices: Select one.

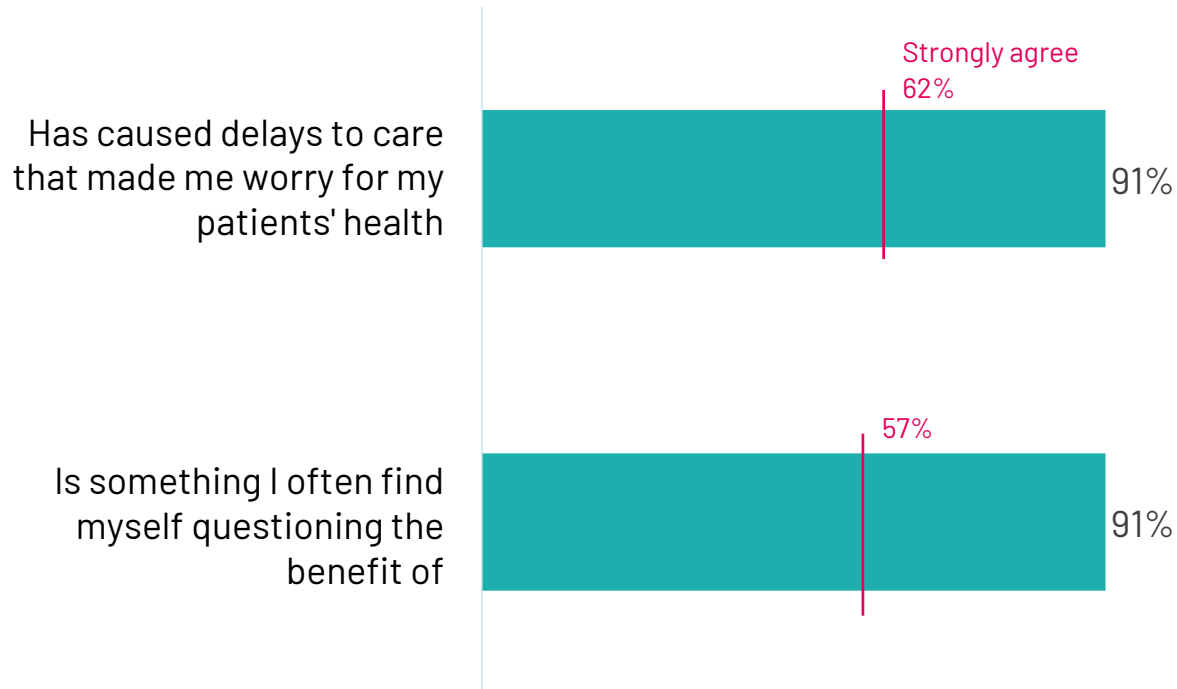
Base: Americans with insurance n=1586, Chronic disease patients n=266, Rx patients n=445, Ages 45-64 n=534, 65+ n=481, Caregivers n=157


Health Care Practitioners have a very negative view of prior auth

Insured Americans find it confusing



Strongly or somewhat agree that prior authorization...



72%  General Public w/insurance

Strongly or somewhat agree that policies like prior authorization are confusing

C10_sum2. Summary of Agree - Please indicate how much you agree or disagree with each of the following statements about health insurance company policies and practices.
Answer choices: strongly disagree, somewhat disagree, somewhat agree, strongly agree
Base: Insured Americans n=1586, Total Practitioners n=408

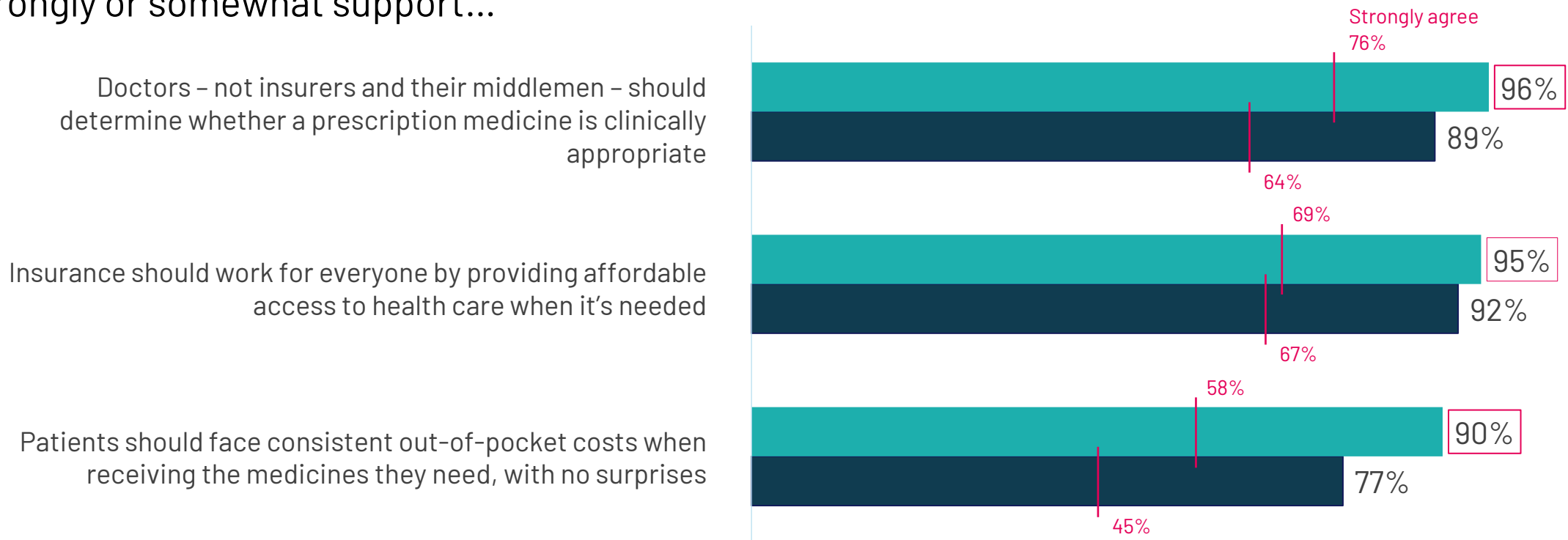
REFORM

#4

Practitioners and the American public have strong views about how insurance “should” work for patients



Strongly or somewhat support...



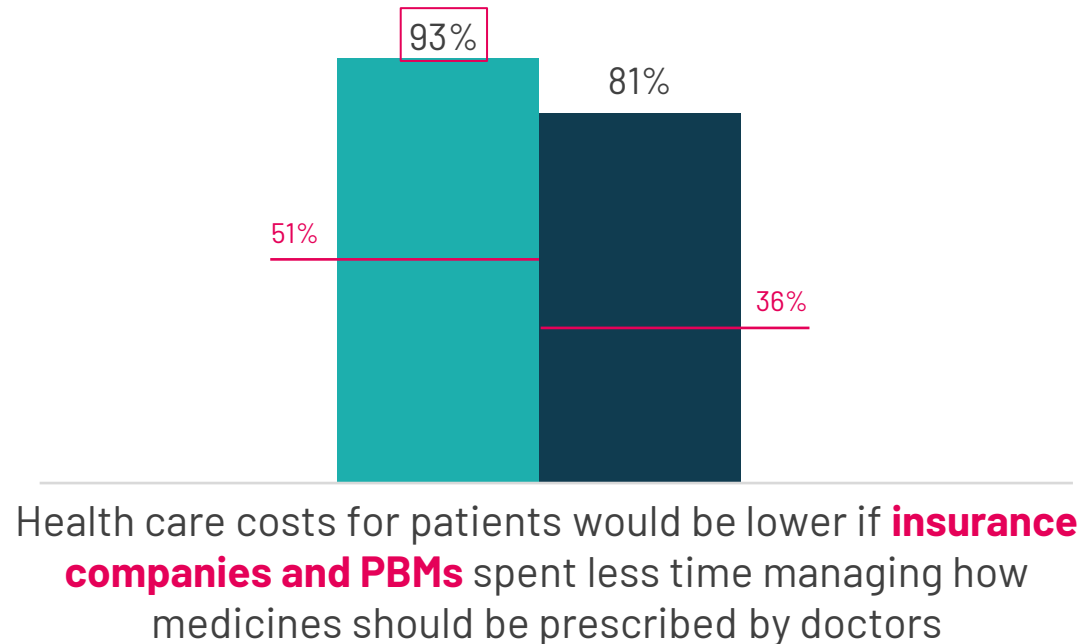
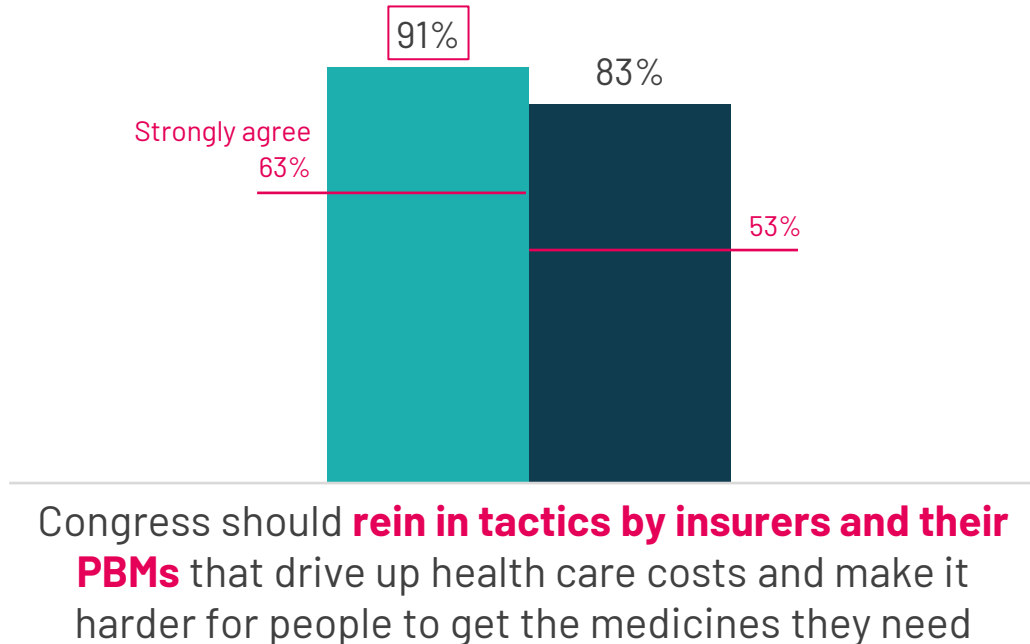
D1_sum2. Summary of Agree - For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. Base: Total Americans n=1702, Total Practitioners n=408

Statistically higher figure at the 95% confidence level (strongly/somewhat agree)

Both audiences link insurance companies and PBM practices with the high cost of health care in the U.S.



Strongly or somewhat agree that...



D1_sum2. Summary of Agree - For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. Base: Total Americans n=1702, Total Practitioners n=408

Statistically higher figure at the 95% confidence level (strongly/somewhat agree)

There is broad support for checks on insurance companies and PBMs



Strongly or somewhat support...

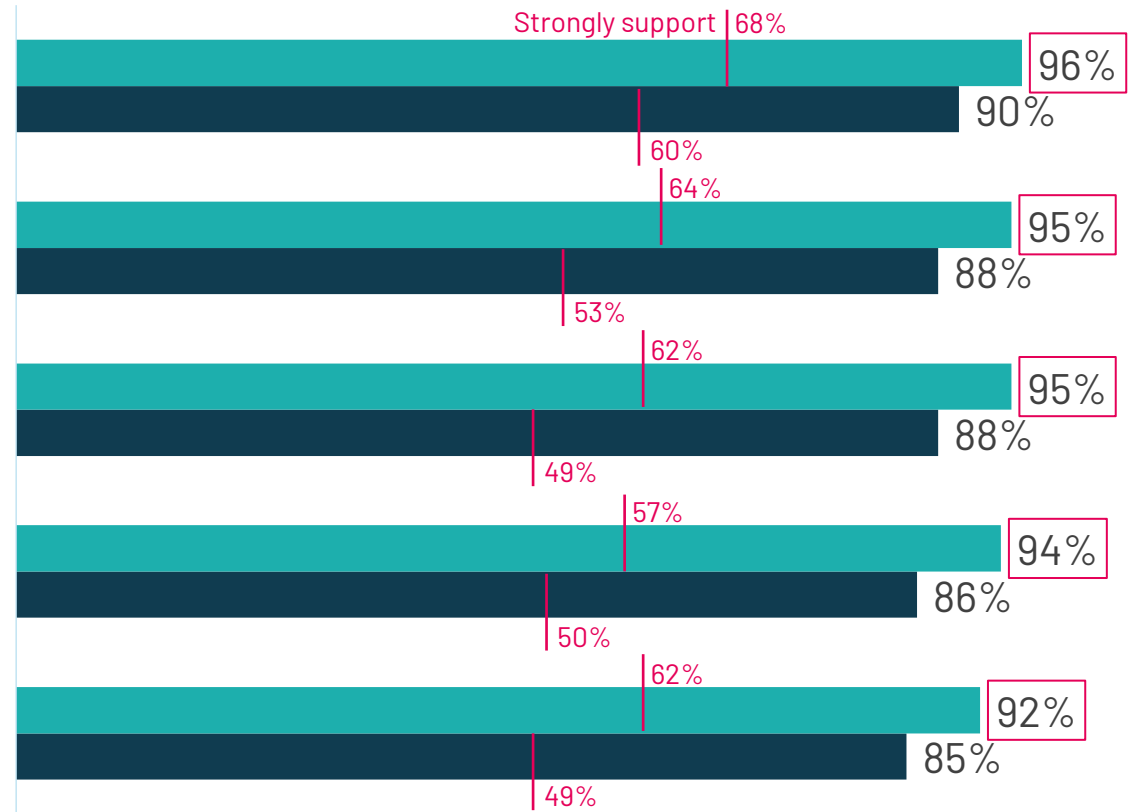
Require health insurers to **pass on any rebates/discounts** received from pharma companies on Rx drugs at the pharmacy counter, so patients pay less out of pocket for their medicines

Prevent surprise out-of-pocket costs at the pharmacy and higher out-of-pocket costs that may be caused when an insurance company does not count **copay assistance** from a pharma company toward a deductible and annual maximum out-of-pocket costs

Ensure **copay assistance** provided by pharma manufacturers counts toward plan deductibles and out-of-pocket maximums

Give health insurers more **incentives** to lower out-of-pocket costs for people who are sick and take prescription medicines

Require health insurers to set a **maximum limit** for what enrollees pay out of pocket just for prescription medicines each year



D2_sum2. Summary of Support - Below are some policies that the government could pursue to address health care costs. For each, Answer choices: strongly oppose, somewhat oppose, somewhat support, strongly support
Base: Total Americans n=1702, Total Practitioners n=408

Statistically higher figure at the 95% confidence level (strongly/somewhat support)



Nurses are especially inclined to support these checks



Nurses

Strongly support...

Require health insurers to **pass on any rebates/discounts** received from pharma companies on Rx drugs at the pharmacy counter, so patients pay less out of pocket for their medicines



of percentage points higher than Doctors

+19

Prevent surprise out-of-pocket costs at the pharmacy and higher out-of-pocket costs that may be caused when an insurance company does not count **copay assistance** from a pharma company toward a deductible and annual maximum out-of-pocket costs



+12

Ensure **copay assistance** provided by pharma manufacturers counts toward plan deductibles and out-of-pocket maximums



+18

Give health insurers more **incentives** to lower out-of-pocket costs for people who are sick and take prescription medicines



+13

Require health insurers to set a **maximum limit** for what enrollees pay out of pocket just for prescription medicines each year



+18

D2_sum2. Summary of Support - Below are some policies that the government could pursue to address health care costs. For each, Answer choices: strongly oppose, somewhat oppose, somewhat support, strongly support
Base: Nurses n=140, Doctors n=203

Statistically higher figure at the 95% confidence level

Contact



Chris Moessner

Senior Vice President, Ipsos US
Public Affairs

✉ Chris.Moessner@ipsos.com

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