

2021 HEALTH CHECKUP SURVEY

THE PRICE WE PAY – ACCESS TO AFFORDABLE TREATMENTS AND ITS IMPACT ON AMERICANS

DECEMBER 2021



**FLEISHMAN
HILLARD**

**TRUE GLOBAL
INTELLIGENCE**



Fredrick Banting, who would win the Nobel Prize for his discovery, was famously quoted, "insulin does not belong to me, it belongs to the world."

**THE PURPOSE OF THIS REPORT IS TO UNDERSTAND
THE STATE OF ACCESS TO AFFORDABLE TREATMENTS
AND THE IMPACT ON AMERICANS**

METHODOLOGY

TRUE Global Intelligence,

The in-house research practice of FleishmanHillard, fielded an online survey of adults 18 years and older in the United States from **December 15 – 28, 2020** and an oversample of Black, Hispanic and Asian Americans.

Data have been weighted by gender and age.

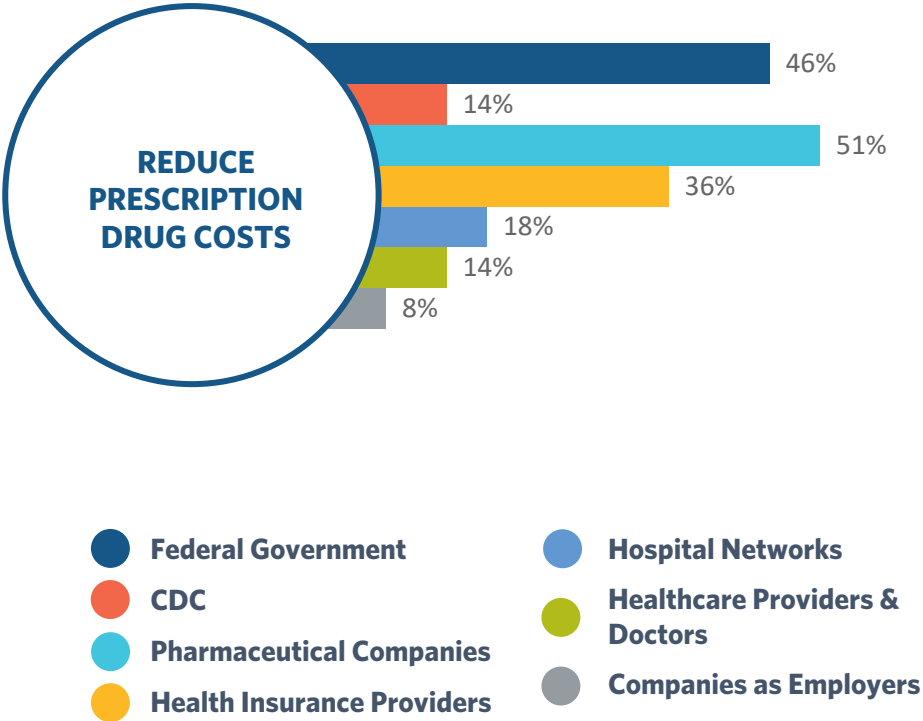
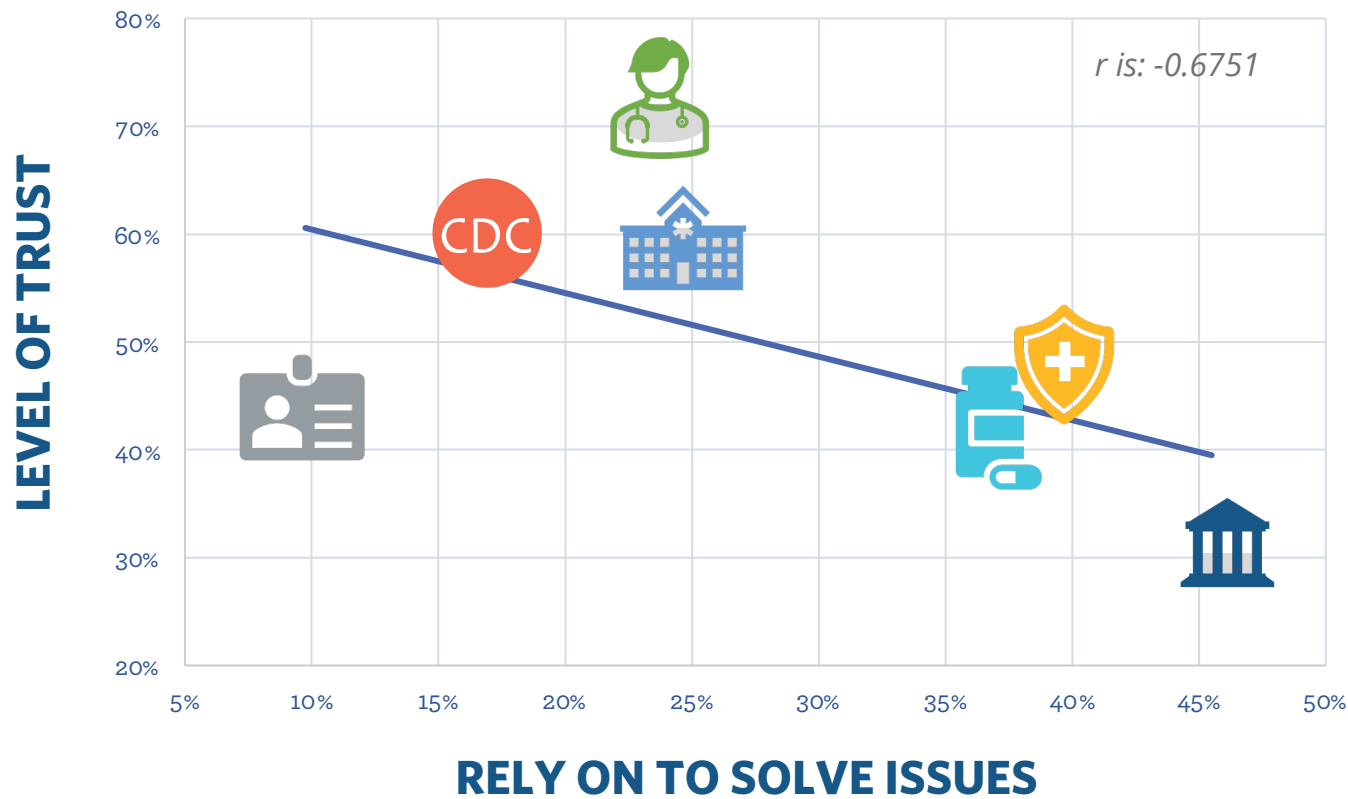
SAMPLE SIZE	
Total	n= 2,503
Total U.S. GenPop	n=1,002
Black/African American Oversample	n=501
Hispanic/Latinx Oversample	n=500
Asian Oversample	n=500

WE LEARNED...

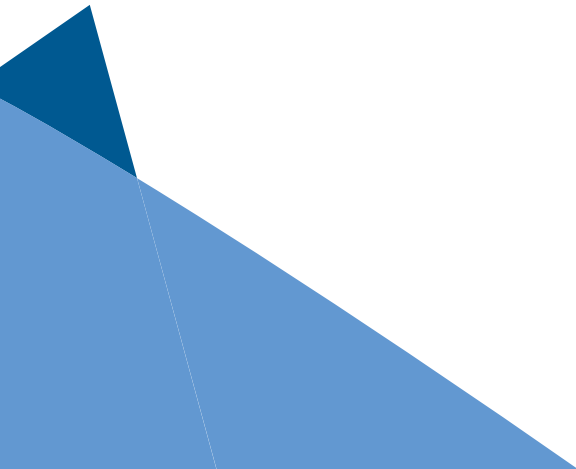
- 1** Affordability was among the top healthcare challenges Americans anticipated facing in **2021**. Reducing the cost of prescription drugs remains an unresolved issue as we end the year.
- 2** We found that trust and reliance have a negative correlation, where the more reliant Americans are on institutions to solve for healthcare issues such as drug pricing, the more difficult it becomes to build trust in those organizations. Understanding this relationship may provide insight into how authentic communications can play a role in strengthening these relationships.
- 3** To build trust through authenticity, Americans express the need for companies to be more transparent around drug pricing and disclose to the general public as to why there are increases in drug prices (**63%**).

THE RELATIONSHIP BETWEEN RELIANCE AND TRUST

While many are reticent to trust the government, pharmaceutical companies and health insurance providers, they also most heavily rely on these entities to solve issues related to drug pricing.



DETAILED FINDINGS



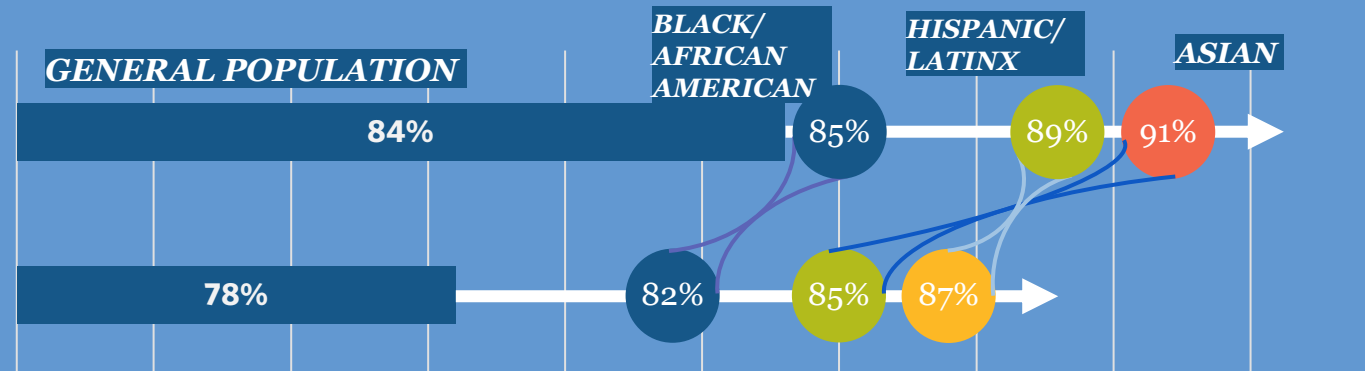
The healthcare challenges Americans anticipate facing in **2021** centered on affordability. Reducing the cost of prescription drugs is one of most important issues Americans faced in **2021**. Affordable and easy access to insulin and supplies is an important issue to four out of five Americans.

REDUCING THE COST OF PRESCRIPTION DRUGS AND AFFORDABLE INSULIN ARE CHALLENGES FACED BY AN EVEN GREATER NUMBER OF BLACKS, HISPANIC/LATINX AND ASIAN AMERICANS.

WHAT'S IMPORTANT?

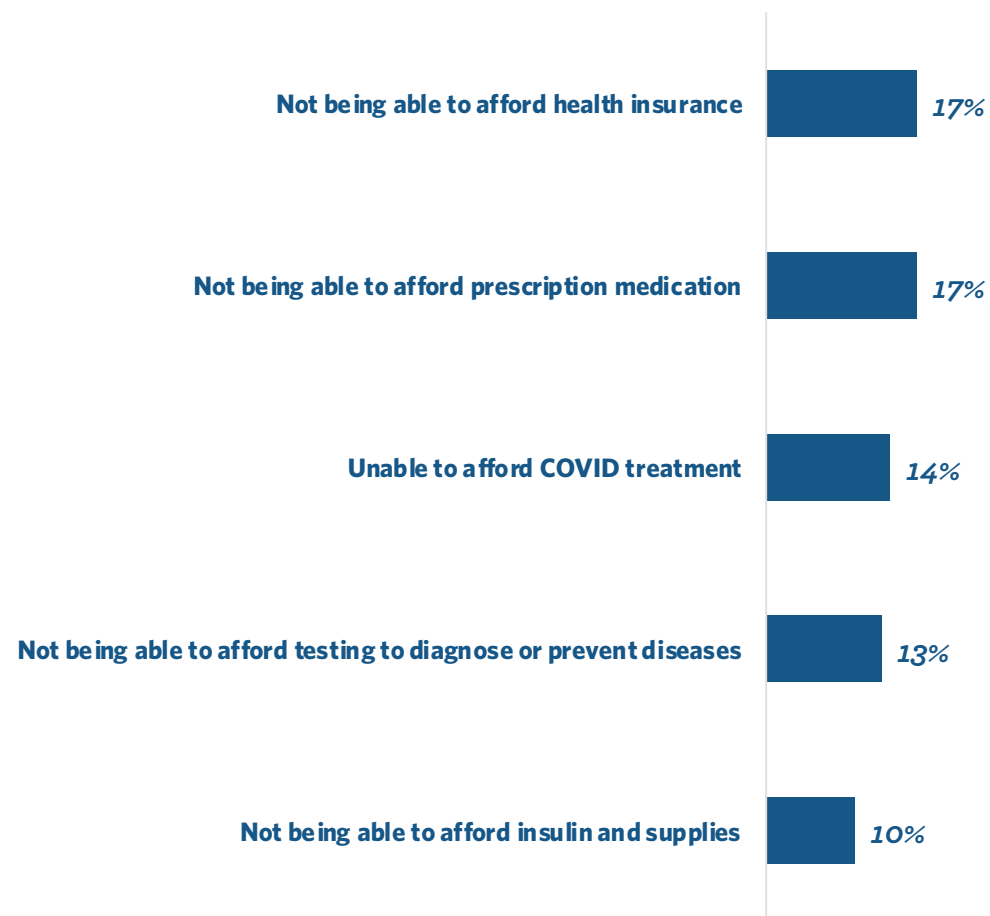
REDUCING THE COST OF
PRESCRIPTION DRUGS

AFFORDABLE AN EASY ACCESS
TO INSULIN AND SUPPLIES



Affordability was among the top healthcare challenges Americans anticipated facing in 2021. One out of 10 Americans faced not being to afford insulin.

HEALTHCARE CHALLENGES AMERICANS ANTICIPATED FACING IN 2021

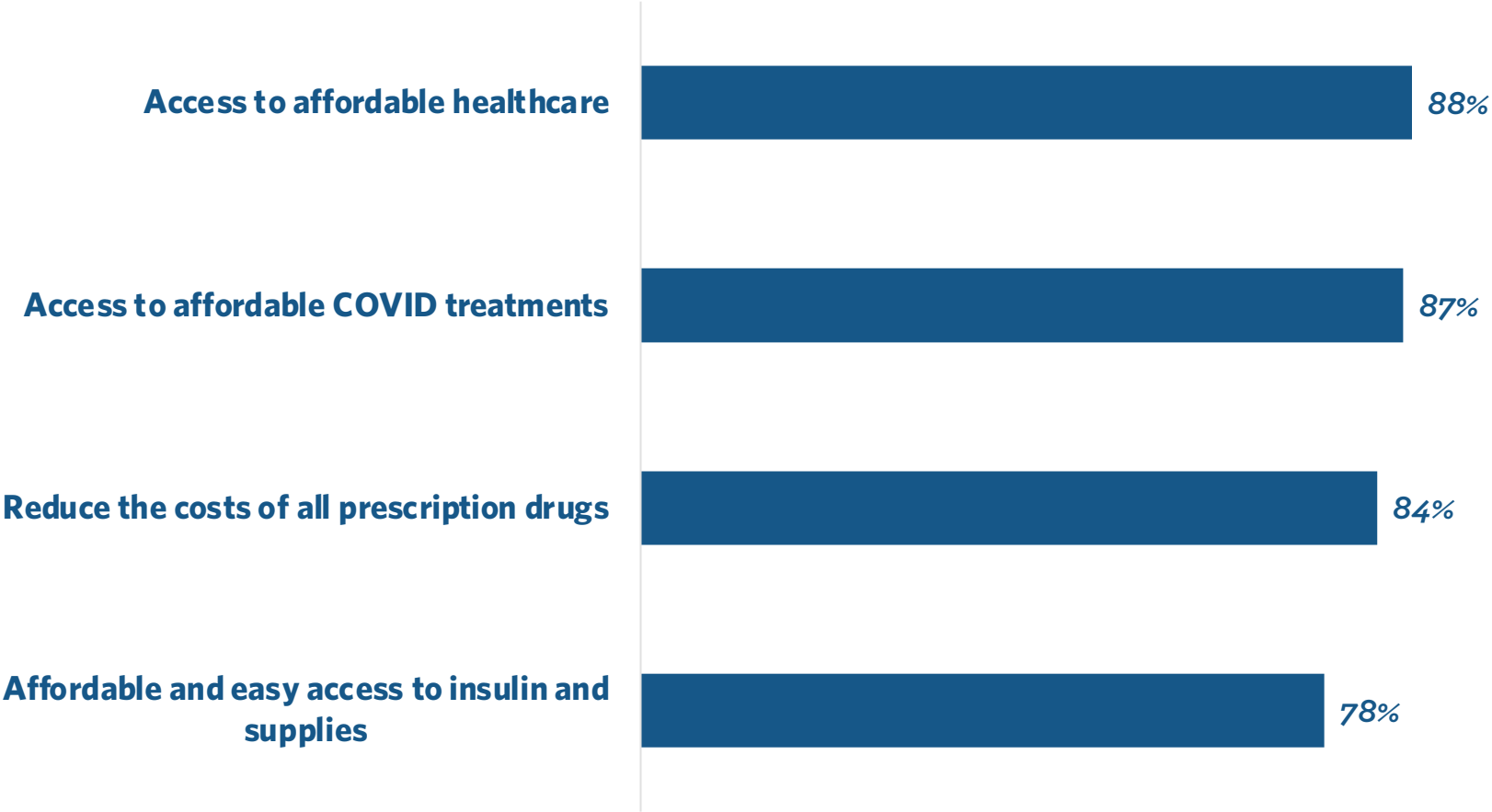


Base size: n=1,002

H18. Which of the following healthcare challenges do you anticipate facing in 2021?

Most Americans feel that access to affordable healthcare, reducing the cost of prescription drugs and affordable access to insulin were important issues in 2021.

IMPORTANCE OF ISSUES IN 2021



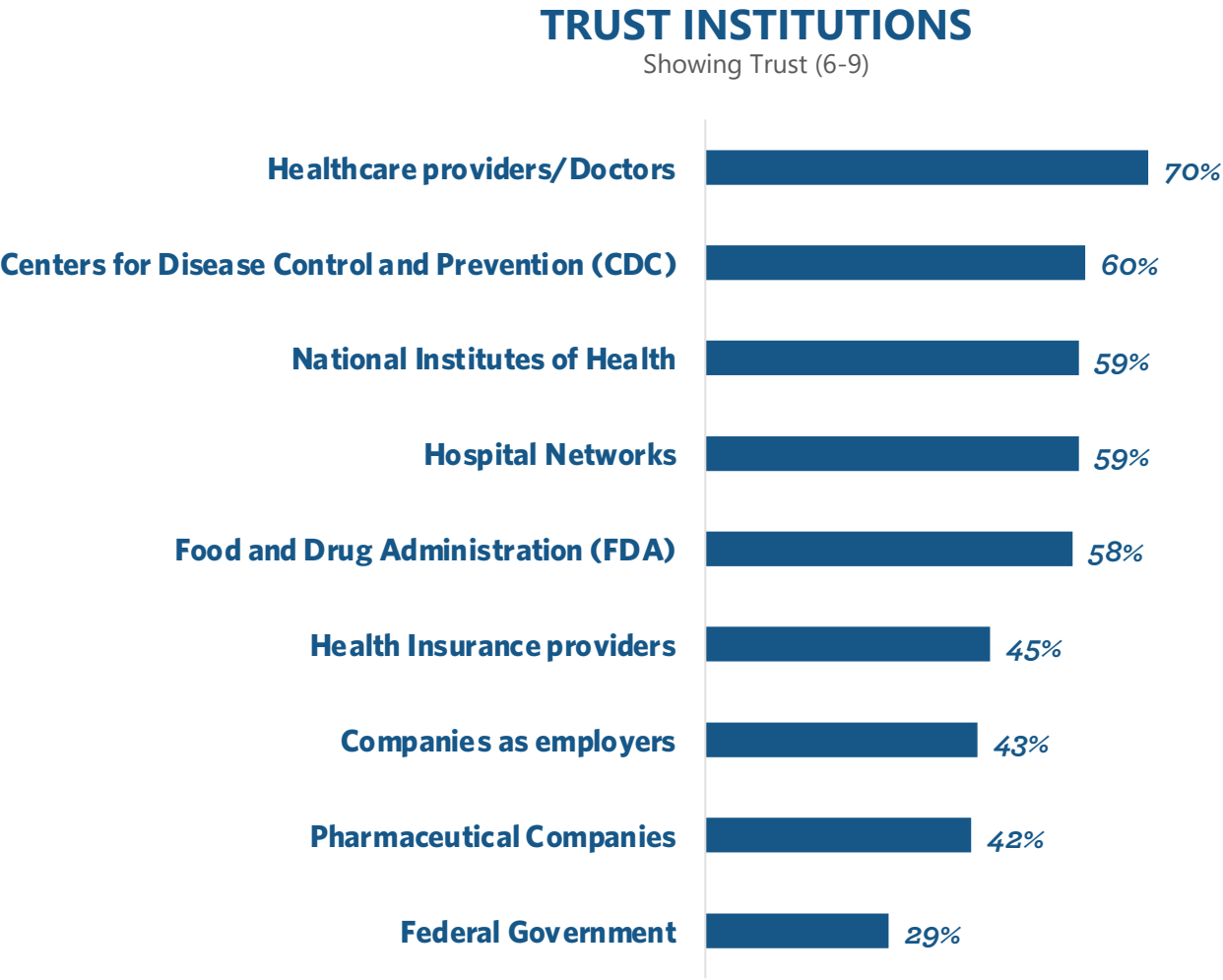
ISS1. Thinking about 2021, how important are each of the following to you? (Scale: Not at all important, Not too important, Somewhat important, Very important, Not sure) Base size: n=1,002- Showing Very Important/Somewhat Important

2021 is marked by limited trust in healthcare institutions to do what is right with the exception of healthcare professionals (HCPs).

Most Americans trust HCPs (**70%**) to do what is right and are least likely to trust companies as employers (**43%**), pharmaceutical companies (**42%**), and the federal government (**29%**).

Nearly a quarter of Americans (**22%**) feel that their trust in pharmaceutical companies eroded in **2020**. This breakdown in trust was most often driven by drug pricing (**46%**) and specifically, companies increasing the cost of insulin exponentially, to increase profits, making it unaffordable for those who depend on it to save their lives (**37%**). Only by addressing the cost of medicines can Pharma regain the trust of Americans (**50%**).

Americans have the most trust for HCPs and doctors, followed by the CDC. Very few trust the federal government.



Base size: n=1,002
R4. Please indicate how much you trust the following institutions to do what is right on a scale of 1 to 9 where 1 is not at all trust and 9 is completely trust and 5 is neither trust or distrust?

To regain trust, pharmaceutical companies must do more to address the cost of medicines and provide affordable prescription treatments.

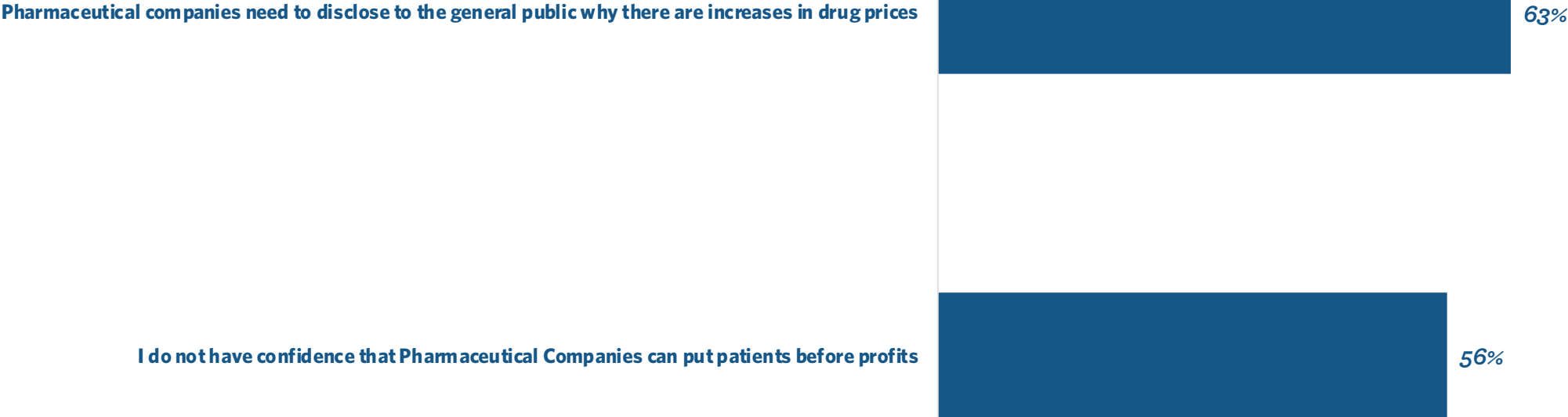
REGAINING TRUST WITH PHARMACEUTICAL COMPANIES



Americans want pharmaceutical companies to be more transparent around drug pricing and prioritize patients over profits.

AGREEMENT STATEMENTS

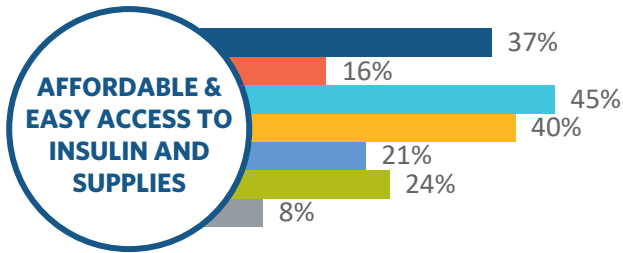
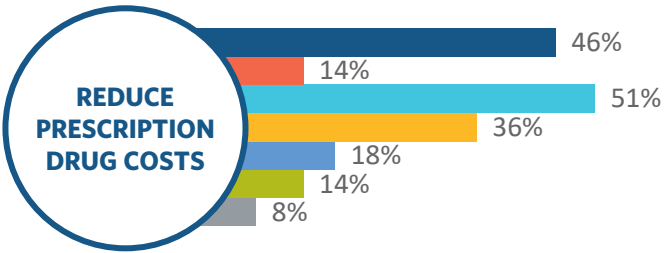
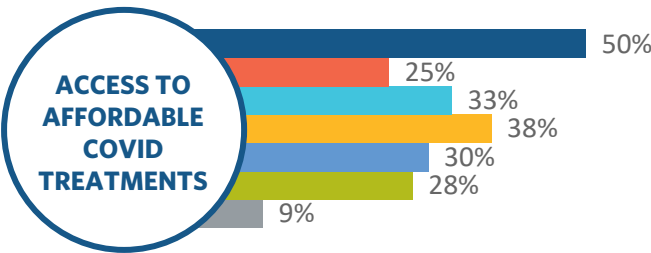
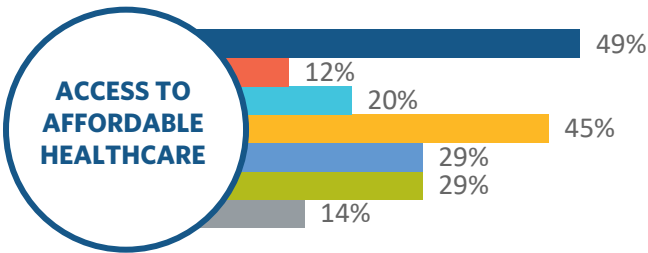
Showing Strongly Agree/Agree



Who is responsible for solving for the price paid for access to affordable healthcare, prescription drugs and insulin?

Over half of Americans (**51%**) say that it is the pharmaceutical companies' responsibility to reduce the costs of prescription drugs in addition to government (**46%**). This is in contrast to the trust they have in those organizations.

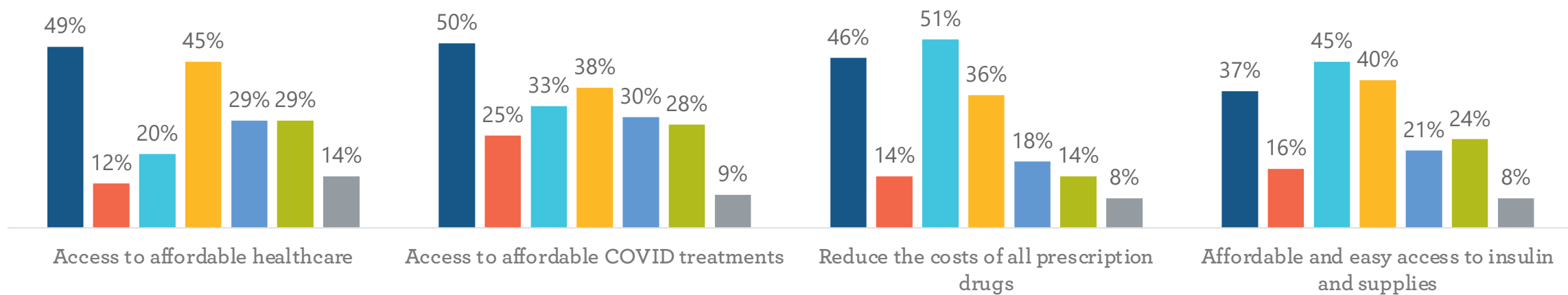
Almost half of U.S. consumers believe the government and health insurance companies are responsible for solving issues related to access to affordable healthcare. Americans are reliant on pharmaceutical companies and the federal government to reduce prescription drug costs.



- Federal Government
- CDC
- Pharmaceutical Companies
- Health Insurance Providers
- Hospital Networks
- Healthcare Providers & Doctors
- Companies as Employers

Almost half of U.S. consumers believe the government and health insurance companies are responsible for solving issues related to access to affordable healthcare.

RESPONSIBILITY TO SOLVE FOR ISSUES IN 2021



■ Federal Gov't ■ CDC ■ Pharmaceutical Companies ■ Health Insurance Companies ■ Hospital Networks ■ Healthcare Providers/Doctors ■ Companies As Employers

RESPONDENT DEMOGRAPHICS

Gender

S1. What do you identify as?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Male	49%	47%	50%	50%
Female	49%	50%	49%	48%
Transgender identify as male	0%	1%	1%	0%
Transgender identify as female	0%	1%	0%	1%
Genderqueer/ Gender Non-conforming	0%	0%	0%	0%
Different Identity	0%	0%	0%	0%
Prefer not to say	1%	1%	0%	1%

Ethnicity

S4. Which of the following best describes your ethnicity?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
White/Caucasian	78%	0%	0%	0%
Black/African-American/African descent	9%	100%	0%	0%
Asian	6%	0%	0%	100%
Hispanic/Latinx	4%	0%	100%	0%
Multiracial	1%	0%	0%	0%
Another race	2%	0%	0%	0%

Generation

S2. What is your age?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
18-23 (Gen Z)	12%	31%	37%	21%
24-39 (Millennial)	26%	25%	26%	28%
40-55 (Gen X)	25%	20%	21%	25%
56-73 (Boomer)	27%	21%	13%	20%
74+ (Silent)	10%	3%	3%	7%

Region

S3. What state do you live in?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Northeast	21%	17%	18%	21%
Midwest	20%	18%	11%	10%
South	40%	54%	40%	20%
West	19%	11%	31%	49%

Household Income

S5. Which of the following includes your total household income BEFORE TAXES?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Less than \$25,000	15%	22%	18%	8%
\$25,000 to \$29,999	6%	12%	9%	5%
\$30,000 to \$34,999	5%	5%	5%	3%
\$35,000 to \$39,999	5%	6%	5%	4%
\$40,000 to \$49,999	6%	7%	6%	6%
\$50,000 to \$59,999	7%	8%	10%	4%
\$60,000 to \$74,999	10%	7%	8%	8%
\$75,000 to \$99,999	12%	9%	15%	14%
\$100,000 to \$124,999	11%	8%	8%	13%
\$125,000 to \$149,999	6%	4%	5%	9%
\$150,000 to \$199,999	7%	4%	5%	10%
\$200,000 or more	7%	5%	4%	14%
Prefer not to answer	2%	2%	2%	2%

Setting Live In

D1. Which one of the following best describes the setting of where you live?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Suburban	51%	44%	45%	56%
Urban	27%	39%	39%	36%
Rural	19%	15%	13%	6%
I'd prefer not to say	3%	3%	3%	2%

Employment Status

D2. What is your current employment status?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Employed full time	34%	39%	40%	48%
Employed part time	9%	14%	17%	9%
Self-employed	6%	8%	5%	6%
Homemaker	6%	3%	6%	4%
Not employed and not looking for work	5%	7%	8%	9%
Became unemployed before the Coronavirus/COVID-19 and currently looking for employment	3%	5%	5%	3%
Became unemployed as a result of the Coronavirus/COVID-19 and currently looking for employment	3%	5%	6%	4%
On furlough as a result of the Coronavirus/COVID-19	1%	3%	3%	1%
Armed Forces/Military	0%	1%	1%	0%
Retired	32%	17%	10%	16%

Health Insurance in 2020

D4. Do you have health insurance in 2020?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Yes	89%	84%	87%	92%
No	11%	16%	13%	8%

Identify As

D3. Do you identify as:				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Heterosexual or straight	87%	84%	82%	86%
Bisexual	4%	6%	8%	4%
Prefer not to answer	3%	3%	2%	3%
Lesbian	3%	2%	2%	2%
Gay	2%	3%	4%	3%
Not listed above	0%	1%	2%	1%

Relationship Status

D6. Which of the following best describes your relationship status?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Married	52%	28%	34%	49%
Single	25%	44%	38%	37%
Divorced	7%	6%	5%	3%
In a relationship	6%	11%	13%	7%
Living with a partner but not married	6%	6%	9%	3%
Widowed	4%	5%	1%	1%

Parental Status

D7. Are you the parent or guardian of a child?				
	Total U.S. GenPop	Black/African American Oversample	Hispanic/Latinx Oversample	Asian Oversample
	n=1002	n=501	n=500	n=500
Yes	42%	39%	38%	36%
No	58%	61%	62%	64%



FLEISHMAN
HILLARD

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INFORMATION

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