

To: Interested Parties

From: Derek Falcon

Subject: Florida Health Care Poll

Date: January 23, 2024

Summary

The survey results highlight a prevailing concern among Floridians regarding the escalating costs in health care, particularly pertaining to prescription drugs. The data reveals dissatisfaction with current government interventions and stresses the need for policy adjustments to address rising health care expenses, reflecting the significant impact of these issues on public sentiment and political support.

However, the survey also reveals that when thinking about legislative priorities this year, voters are focused on economic concerns like inflation, not health care costs – underscoring voter desire for policymakers to concentrate on other issues in 2024.

Key Findings:

- **Likely voters are focused on economic concerns, not health care costs.** When asked about the most important issue facing the country, 29% of likely voters point to "improving the economy," and an additional 24% highlight "reducing inflation," constituting a 53% majority. "The rising cost of health care" ranks last, with only 6% of likely voters selecting it as their top issue.
- **Likely voters want cost solutions and are already satisfied with prescription drug accessibility, availability, and quality.** They are dissatisfied with prescription drug "cost," with 54% of likely voters expressing discontent.
- **Likely voters blame pharma, not PBMs, for rising costs.** A 38% plurality of likely voters identify "Big Drug Companies" as the primary culprit for rising costs. Only 4% of the sample hold pharmacy benefit managers (PBMs) responsible for the escalating costs.
- **Likely voters value lower costs over expanded access.**
 - Likely voters were given the option between having more choices for where to pick up prescriptions or benefiting from lower premiums and co-pays. A significant 74% express a preference for lower premiums and co-pays.
 - Likely voters were asked if they would rather pick up a discounted prescription at a specific pharmacy or pay the regular price at any pharmacy. A decisive 73% of likely voters state a preference for the discounted option.
 - When asking Florida likely voters about proposed legislative changes, a 50% majority oppose outlawing lower-cost pharmacy options, like receiving discounts

at certain pharmacies, or getting prescriptions delivered at home. Only 29% of likely voters support this type of legislation.

- **Likely voters will hold lawmakers accountable.** A 56% majority of Florida likely voters say they would be less likely to support a candidate who voted to outlaw discount prescription options.

Atmospherics

Florida likely voters express a predominantly pessimistic outlook for the country, with 72% indicating a belief that the U.S. is on the wrong track. However, when focusing on Florida, the sentiment shifts, with 46% of participants believing the state is on the right track.

In delving into specific concerns, economic issues emerge as a primary focus. When asked about the most important issue facing the country, 29% of likely voters point to "improving the economy," and an additional 24% highlight "reducing inflation," constituting a 53% majority. Notably, economic concerns garner broad support across all demographics, with the greatest emphasis among 45-54 year-olds (69%), 30-44 year-olds (61%), and African Americans (62%).

In contrast, the rising cost of health care ranks last, with only 6% of respondents selecting it as their top issue. Those more inclined to choose this option tend to be liberals (12%), Democrats (10%), and individuals earning more than \$90k per year (11%).

Health Care Concerns

The prevailing sentiment among likely voters is that the U.S. health care system faces significant challenges, as 54% believe it has major problems, and an additional 18% perceive it to be in a state of crisis. In contrast, only 16% express the view that the system encounters only minor problems. Collectively, these figures underscore a widespread belief that the U.S. health care system is fundamentally broken.

A majority of likely voters (57%) report a rise in their health care and prescription drug costs over the past year. This sentiment is particularly pronounced among 18-44 year-olds (64%), individuals with private insurance (65%), and the uninsured (64%). Conversely, only 7% note a decrease in costs, while the remaining 32% reported no change.

Upon further probing into voters' perceptions of who bears responsibility for rising costs, a 38% plurality identify "Big Drug Companies" as the primary culprit. Another 20% of likely voters attribute the blame to health insurance companies, while an additional 20% point fingers at the government. Only 4% of likely voters hold pharmacy benefit managers responsible for the escalating costs.

Prescription Drug Costs

The survey delved into participants' individual encounters in obtaining prescription drugs. Participants provided ratings on specific factors (quality, availability, accessibility, and cost), reflecting their personal satisfaction. Markedly, participants express the highest levels of

satisfaction with “accessibility,” “availability,” and “quality.” In contrast, “cost” emerges as the aspect garnering the highest dissatisfaction, with over 54% of likely voters expressing discontent.

In examining solutions to address prescription drug concerns, participants were given the option between having more options for where to pick up prescriptions or benefiting from lower premiums and co-pays. A significant 74% of likely voters express a preference for lower premiums and co-pays. Afterwards, participants were asked if they would rather pick up a discounted prescription at a specific pharmacy or pay the regular price at any pharmacy. A decisive 73% of likely voters state a preference for the discounted option. These two questions further highlight the ongoing concern about rising costs as the primary issue in likely voters' health care.

Sample Methodology

The Tyson Group conducted an internet panel in Florida with N=801 self-identified likely general election voters. The survey occurred from January 3 to January 4, 2024, with a margin of error of +/-3.46%. The partisan splits in the survey were adjusted to R+5 (40% REP/35% DEM/25% NMP), a weighting we consider representative of the anticipated electorate in the upcoming fall.