



HEALTHCARE LEADERSHIP COUNCIL

Seniors on Medicare Part D

SEPTEMBER 2021

|
THE PROBLEM

LEADERS NEED FASTER INSIGHTS
TO MAKE BETTER DECISIONS.



THE SOLUTION

Morning Consult delivers better scale, quality, and speed to insight.



UNRIVALED SCALE

Morning Consult's proprietary platform has access to 100+ million people globally, enabling over 20,000 daily interviews in the 15 largest economies and custom projects in over 100 countries.



UNMATCHED QUALITY

Morning Consult's industry leading sample provider validation process, stratified sampling design, comprehensive attentiveness testing, & advanced weighting methodology is trusted globally.



UNPRECEDENTED SPEED

Morning Consult's state-of-the-art software processes and visualizes more than 7 trillion unique data points daily, powering real-time analysis and faster client deliverables than any competitor.

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EUROPEAN CENTRAL BANK

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MEDICARE PART D

Poll Methodology

SCREENER QUESTIONS

Seniors on Part D: Registered voters who are 65+ years of age, covered by Medicare for seniors, and currently have prescription drug coverage through Medicare.

- What is your age?
TERMINATE IF < 65]
- Are you, yourself, now covered by any form of health insurance or health plan or do you not have health coverage at this time?
[TERMINATE IF NO INSURANCE]
- For your healthcare are you covered by a...
[TERMINATE IF MEDICARE FOR SENIORS NOT SELECTED]
- Do you currently have prescription drug coverage through medicare?
Yes
No **[TERMINATE]**
Don't know/unsure **[TERMINATE]**

SAMPLE DEFINITION

Seniors on Part D: Registered voters who are 65+ years of age, covered by Medicare for seniors, and currently have prescription drug coverage through Medicare.

METHODOLOGY

This poll was conducted by Morning Consult, on behalf of Healthcare Leadership Council, between June 24-29, 2021 among a sample of 1,000 Senior Voters on Medicare Part D. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 3 percentage points.

This poll was also conducted between June 26-June 28, 2020 among a national sample of 1000 Senior Voters on Medicare Part D. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 3 percentage points.

Key Findings

SATISFACTION

Seniors remain extremely satisfied with both their Medicare coverage and prescription drug coverage.

IMPACT

Seniors on Part D see the program as having a positive impact their coverage has on the costs of prescription drugs

REFORM

Seniors on Part D are more supportive of proposals designed to keep costs low and increase transparency

AGENDA

SATISFACTION WITH MEDICARE

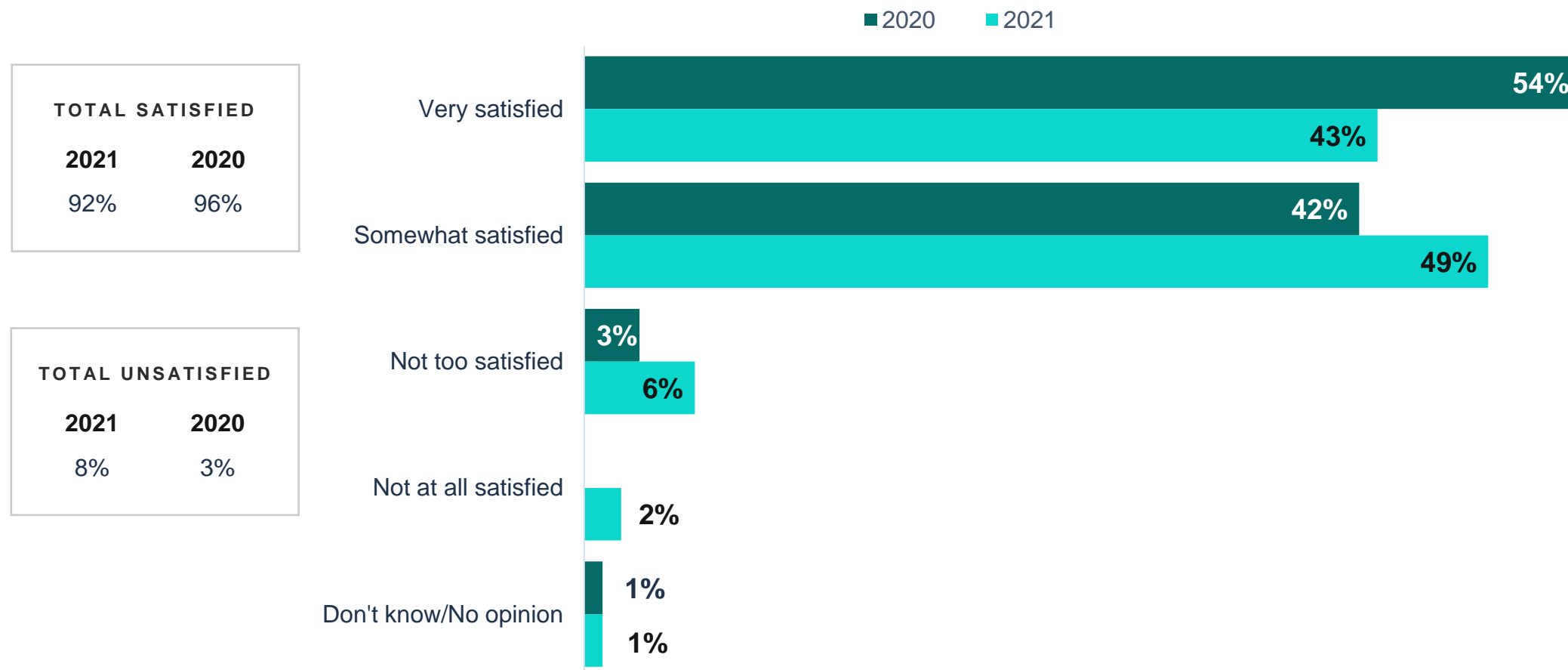
PERCEPTIONS OF MEDICARE PART D

COST OF HEALTH CARE TRADE-OFFS



SATISFACTION WITH MEDICARE

Overall, how satisfied are you with your Medicare health care coverage? Are you...



AGENDA

SATISFACTION WITH MEDICARE

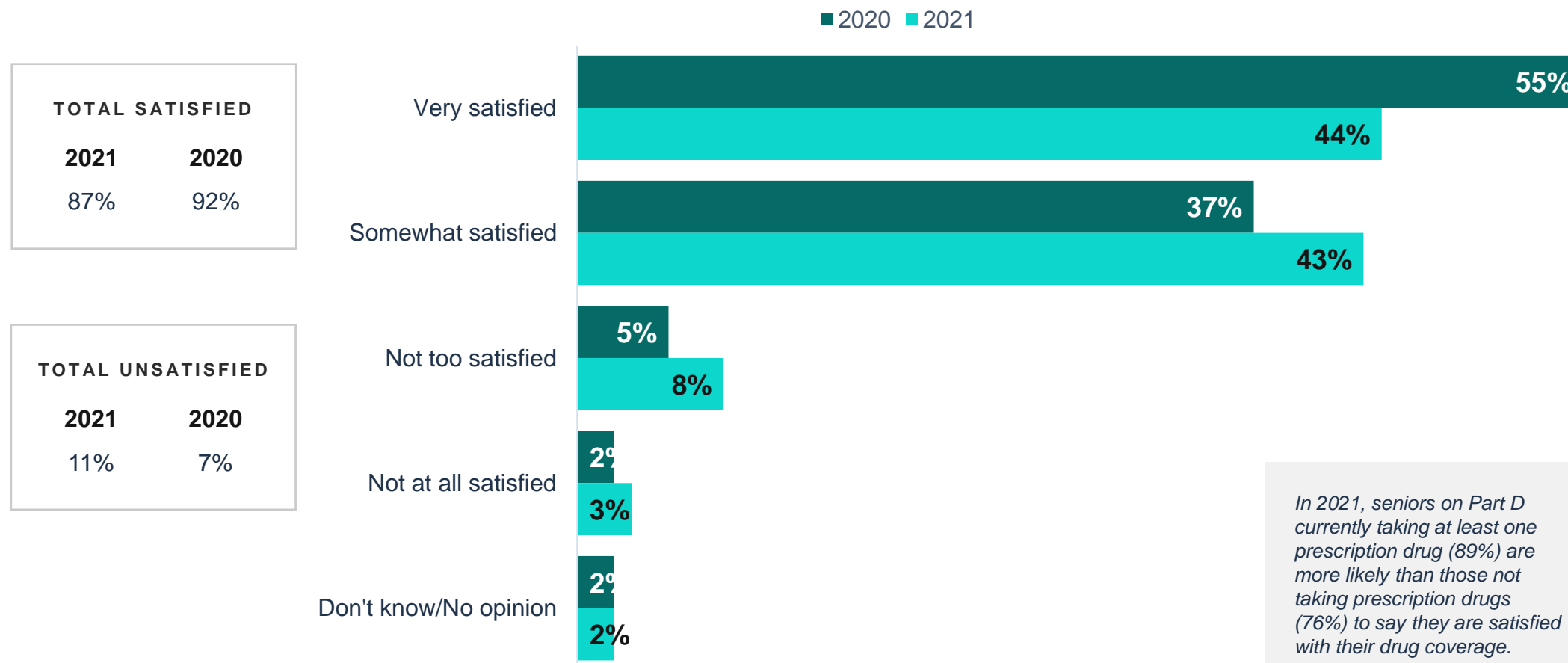
PERCEPTIONS OF MEDICARE PART D

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PERCEPTIONS OF MEDICARE PART D

Overall, how satisfied are you with your Medicare prescription drug coverage? Are you...



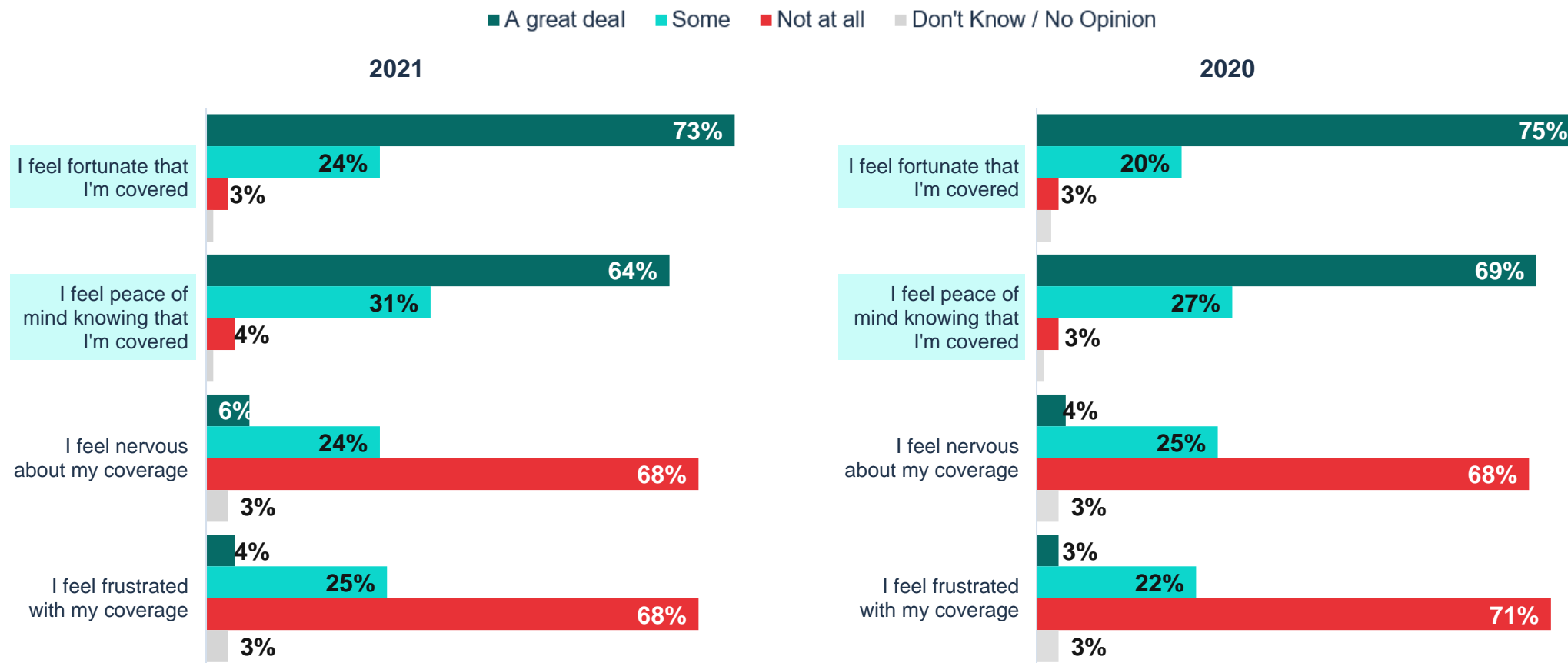
TOTAL SATISFIED	
2021	2020
87%	92%

TOTAL UNSATISFIED	
2021	2020
11%	7%

In 2021, seniors on Part D currently taking at least one prescription drug (89%) are more likely than those not taking prescription drugs (76%) to say they are satisfied with their drug coverage.

PERCEPTIONS OF MEDICARE PART D

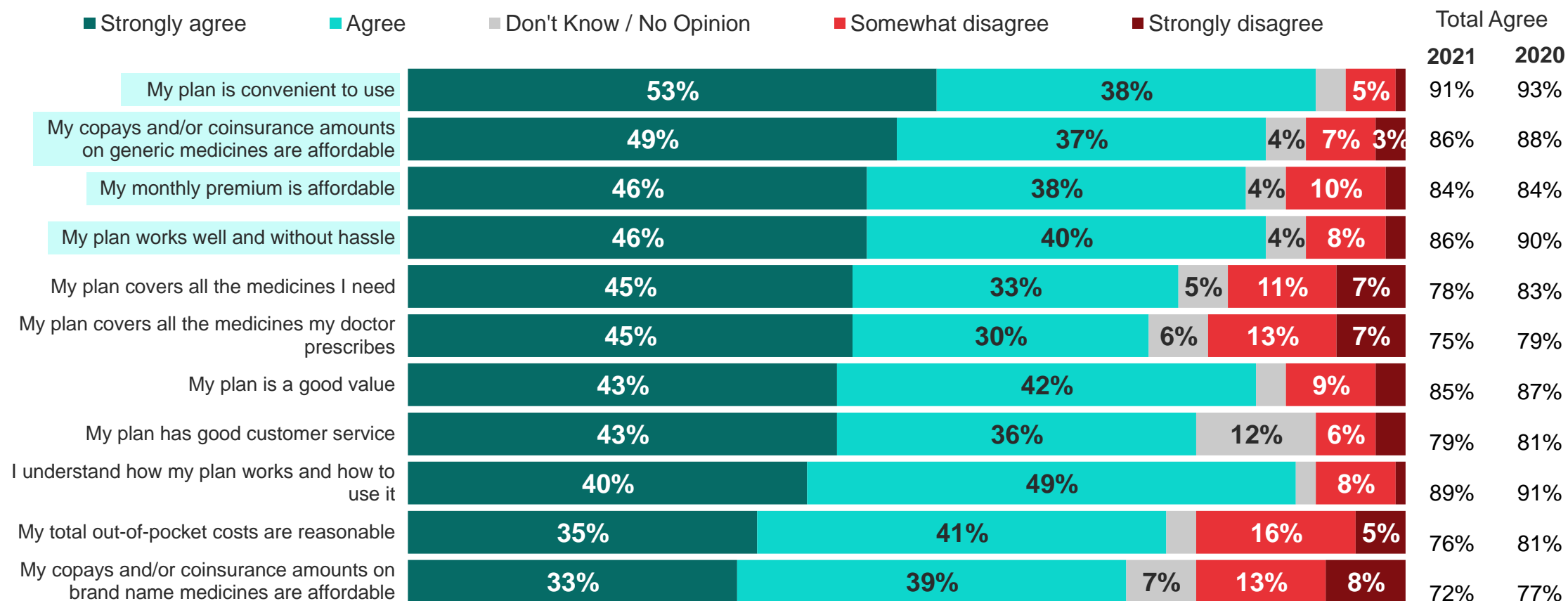
The following phrases may or may not describe how you feel about your Medicare prescription drug coverage these days. For each phrase, please select whether it describes how you're feeling a great deal, some, or not at all.



In 2021, seniors on Part D with multiple chronic conditions (75%) are more likely than those without a chronic condition (63%) to say they feel "a great deal" fortunate to be covered.

PERCEPTIONS OF MEDICARE PART D

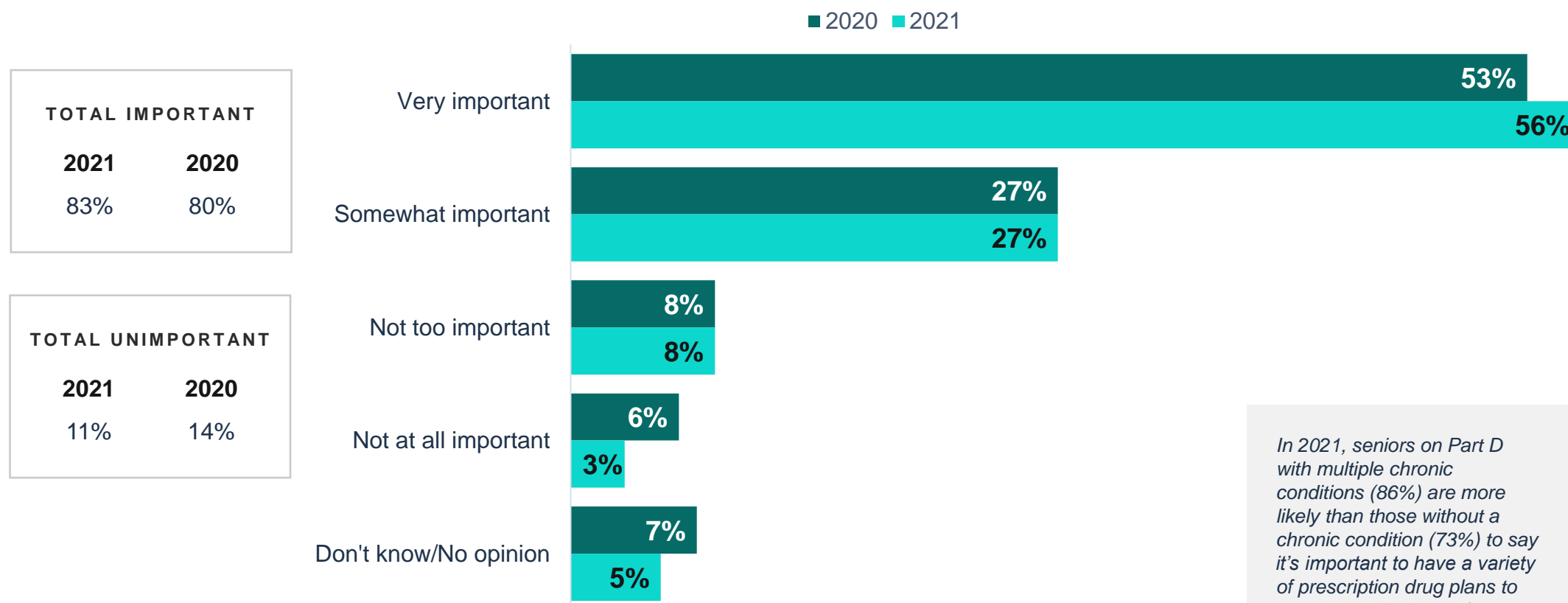
The following statements may or may not describe your opinion about your Medicare prescription drug plan. For each of the following, please select whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the statement.



Seniors on Part D currently taking at least one prescription medicine are more likely than those who are not to say their copays on generic and brand name medicines are affordable.

PERCEPTIONS OF MEDICARE PART D

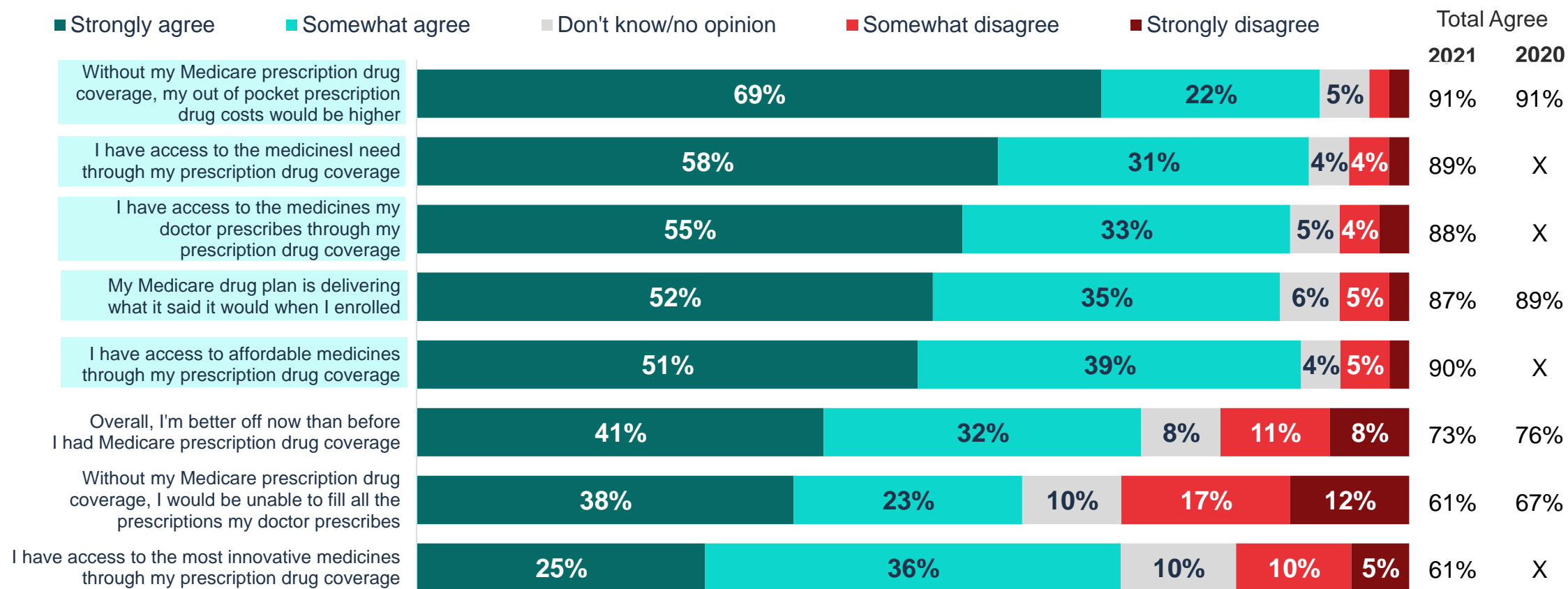
Medicare Part D, also called the Medicare prescription drug benefit, is an optional prescription drug program that helps Medicare beneficiaries pay for the medicines that they get at the pharmacy counter. How important, if at all, is it to you personally to have a variety of Medicare Part D prescription drug plans to compare and choose from?



In 2021, seniors on Part D with multiple chronic conditions (86%) are more likely than those without a chronic condition (73%) to say it's important to have a variety of prescription drug plans to compare and choose from.

PERCEPTIONS OF MEDICARE PART D

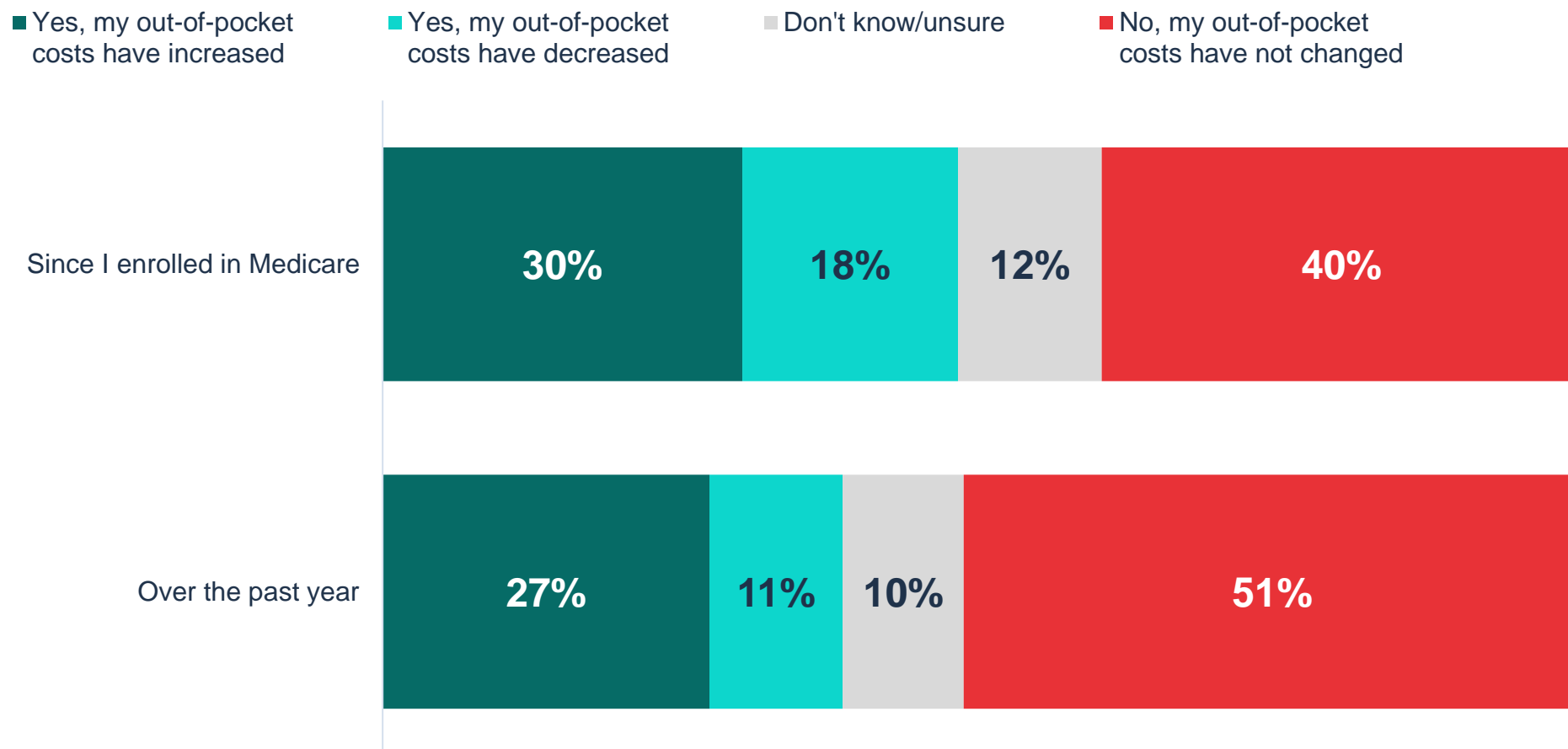
Do you agree or disagree:



Seniors on Part D who are currently taking at least one prescription drug (94%) are more likely than those who are not taking a prescription drug (69%) to say that their drug costs would be higher without their coverage.

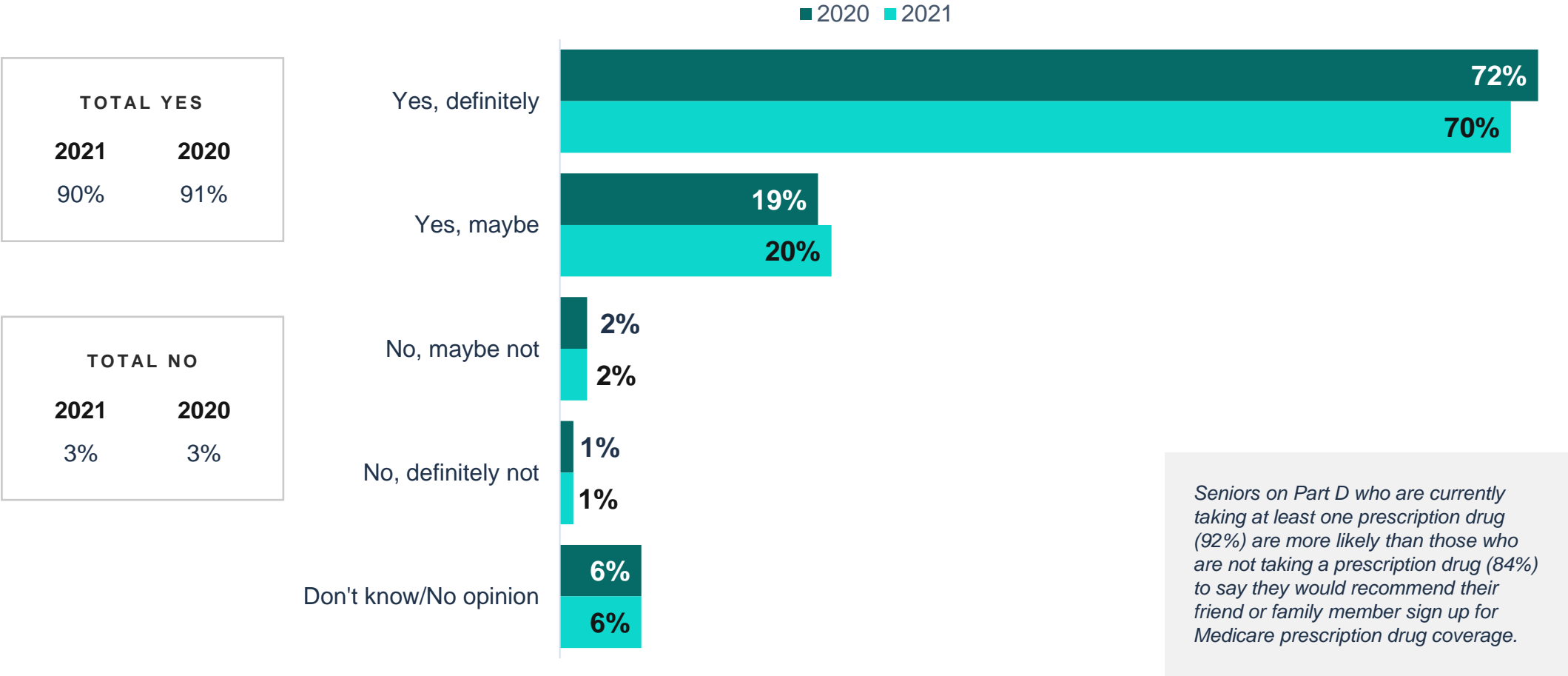
PERCEPTIONS OF MEDICARE PART D

Thinking about each of the following time periods, have you noticed a change in your out-of-pocket costs for prescription medicines?



PERCEPTIONS OF MEDICARE PART D

Would you recommend that a friend or family member considering Medicare prescription drug coverage sign up or not?



AGENDA

SATISFACTION WITH MEDICARE

PERCEPTIONS OF MEDICARE PART D

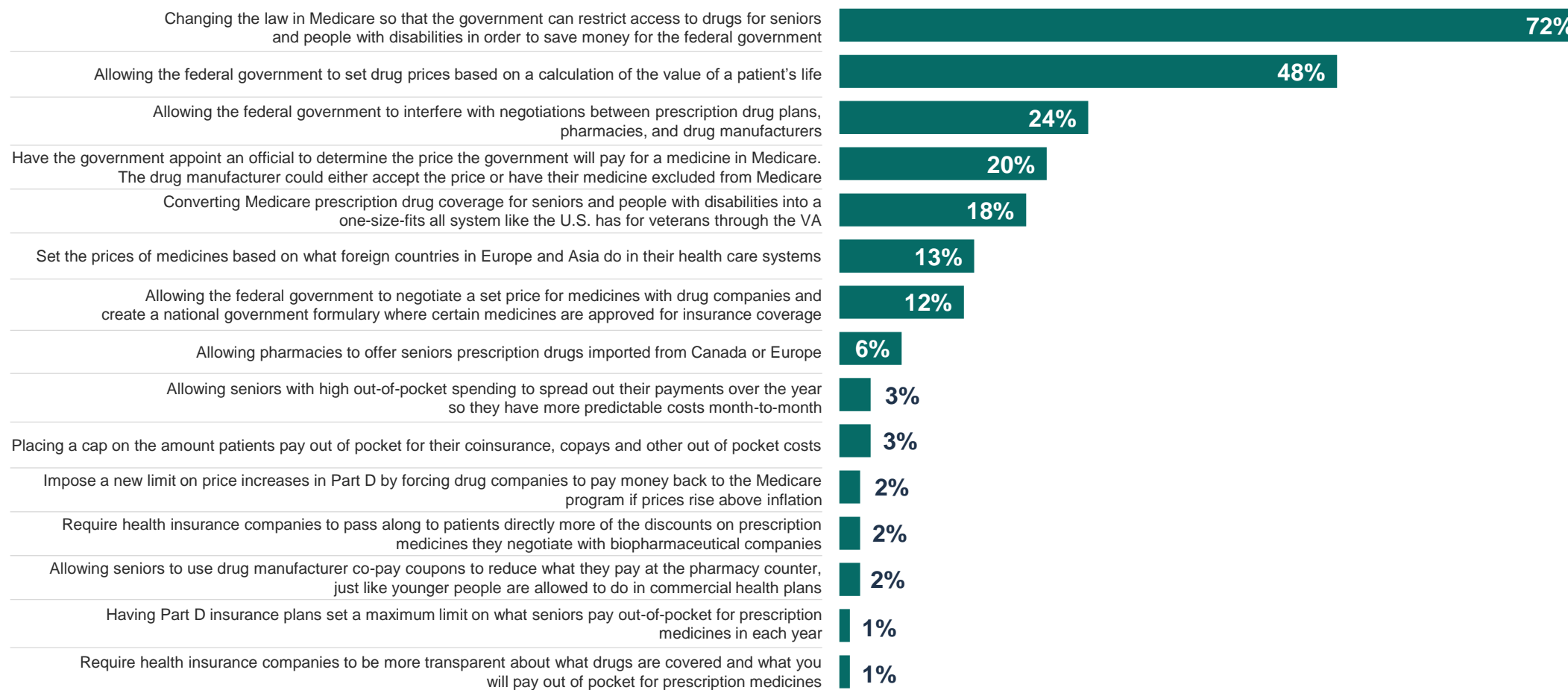
COST OF HEALTH CARE TRADE-OFFS



COST OF HEALTH CARE TRADE-OFFS

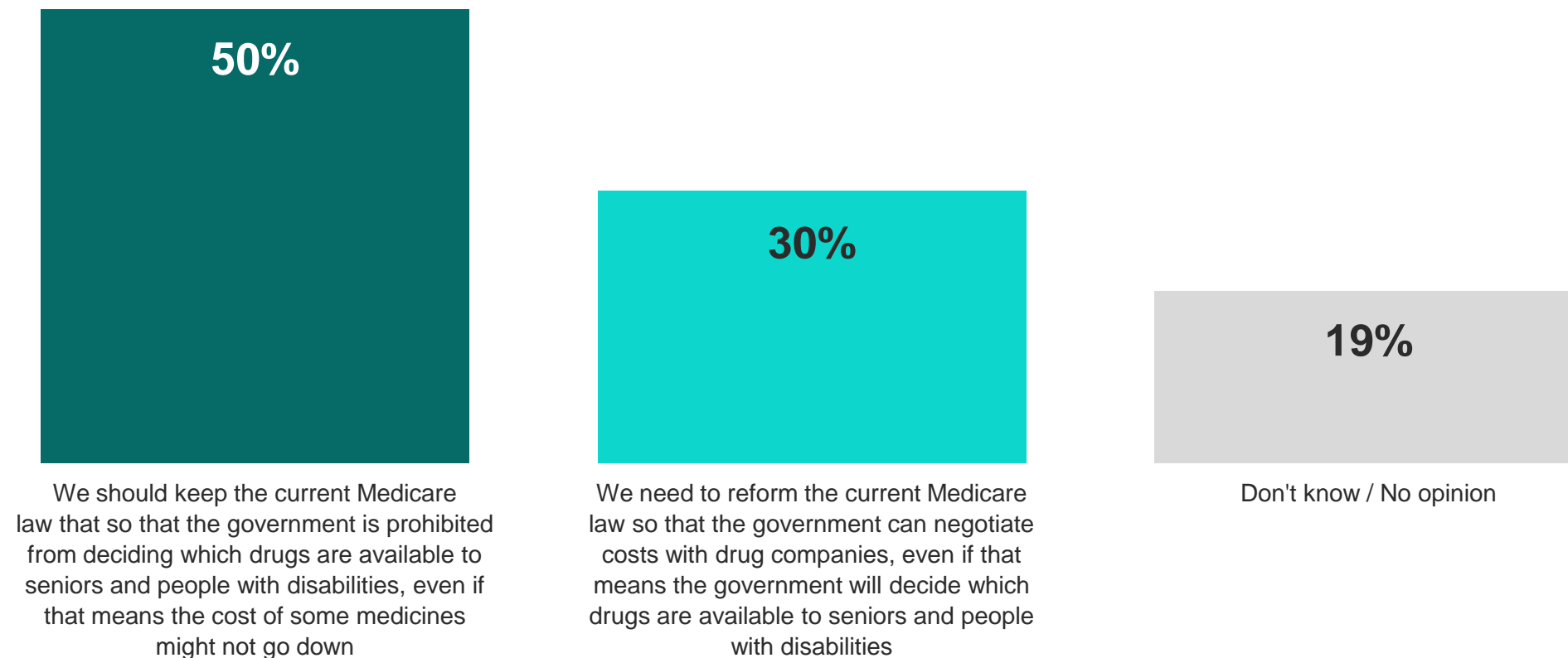
Now I am going to read you a list of policy changes related to Medicare Part D. For each one, please tell me on a scale from 0 to 10 how supportive you are towards this change, where 10 means very supportive, 0 means not at all supportive. You may use any number from 0 to 10. The higher the number, the more supportive you are about the statement.

RANKED BY BOTTOM TWO BOX (0+1)



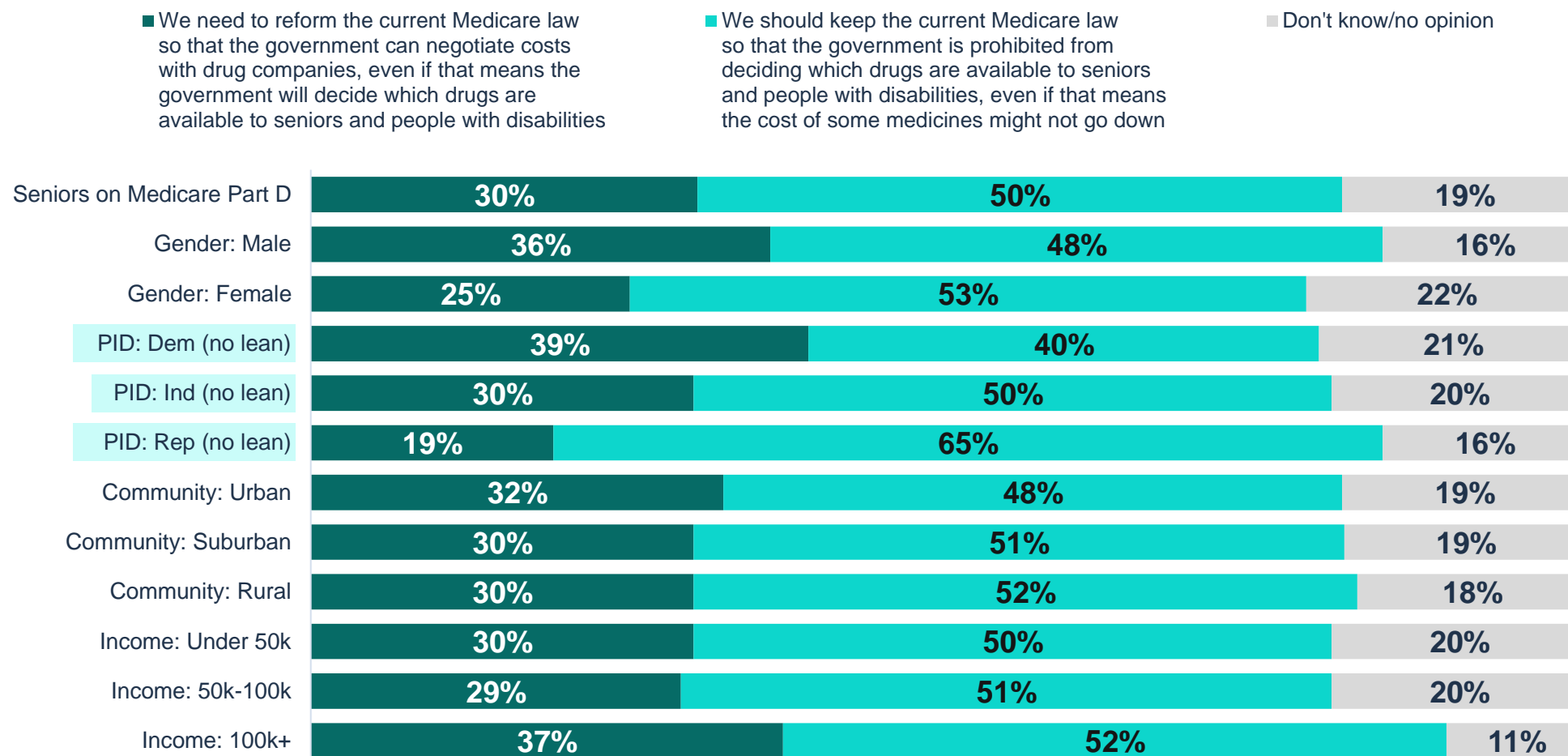
COST OF HEALTH CARE TRADE-OFFS

Which is closer to your opinion, even if neither is exactly right?



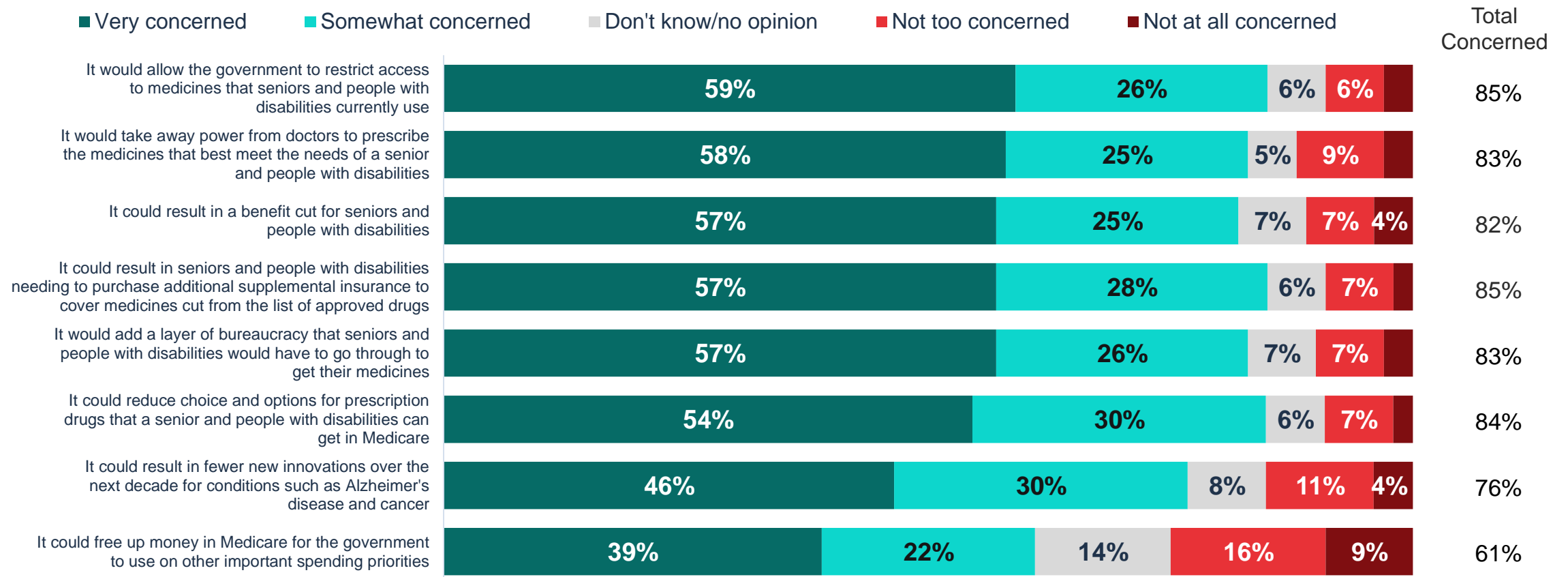
COST OF HEALTH CARE TRADE-OFFS

Which is closer to your opinion, even if neither is exactly right?



COST OF HEALTH CARE TRADE-OFFS

As you may know, policymakers are considering allowing the government to set the price of medicines or determine which medicines are covered in Medicare. If the government were allowed to set the prices of medicines and determine which medicines are covered in Medicare, how concerned would you be about each of the following, if at all?





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