

DOAR

A National Study of Community Attitudes Toward Pharmaceutical Companies



A STUDY BY THE DOAR RESEARCH CENTER

Introduction



Opinions of pharmaceutical companies have shifted over time.

For years, the public has viewed the pharmaceutical industry negatively. Negative public sentiment reached particularly low levels in 2019. In Gallup's annual survey of opinions about different industries, the pharmaceutical industry ranked dead last, with 58% viewing it negatively and only 27% viewing it positively. In fact, these ratings were the lowest since Gallup began collecting data on different industries in 2001. According to Gallup's analysis, high drug costs, massive advertising and lobbying spending and the opioid crisis have all tarnished the industry's public image (McCarthy, 2019).

However, some data suggests that public opinion of the pharmaceutical industry dramatically improved during the pandemic (Anderson, 2021). In a March 2021 survey of likely voters conducted by the progressive think tank Data for Progress, results showed that a majority of respondents (56%) had favorable opinions of pharmaceutical companies. Gains for Pfizer and Moderna, two of the companies developing Covid vaccines, were even more notable, with 65% and 60% respectively reporting favorable opinions of these companies (Chen, 2021).

Positive attitudes toward the pharmaceutical industry are waning, with concerns over high drug prices becoming more prevalent.

While pharmaceutical companies' reputation surged during the COVID-19 pandemic, some recent research suggests their reputation is returning to its normal lows as the pandemic has subsided. Gallup shows positive opinions of the industry dropped to 31% in 2021 and then 25% in 2022, and even further to 18% in 2023. Even vaccine creators Moderna and Pfizer's reputations have not been immune to this drop (Bushak, 2023; Reed, 2022). In contrast, however, Harris polls reported 45% positive perceptions in both 2022 and 2023 – lower, admittedly, than the 62% high in 2021 but still higher than pre-pandemic levels (Endpoints, 2024).

Whatever the general sentiment about the industry, we know the public is concerned about high drug prices (Lawson, 2021; Hamel et al., 2022) and the extent to which these prices are driven by profit motive. Findings in this area have been mixed. In a 2021 Kaiser Family Foundation survey, while 78% believed profit was a major contributing factor to drug prices, 68% believed research and development was a major factor as well. (Hamel et al. 2022). A recent DOAR survey, conducted in 2023, explored this issue and found that residents of New Jersey and Delaware, two states with large pharmaceutical company presences, held largely favorable views of pharmaceutical companies. Moreover, these positive views prevailed despite many respondents' beliefs that pharmaceutical companies prioritized profits over patients.

In our latest research, DOAR expanded the study to a national sample and included additional timely topics, including the opioid epidemic and pricing issues around new weight-loss drugs.



The Survey

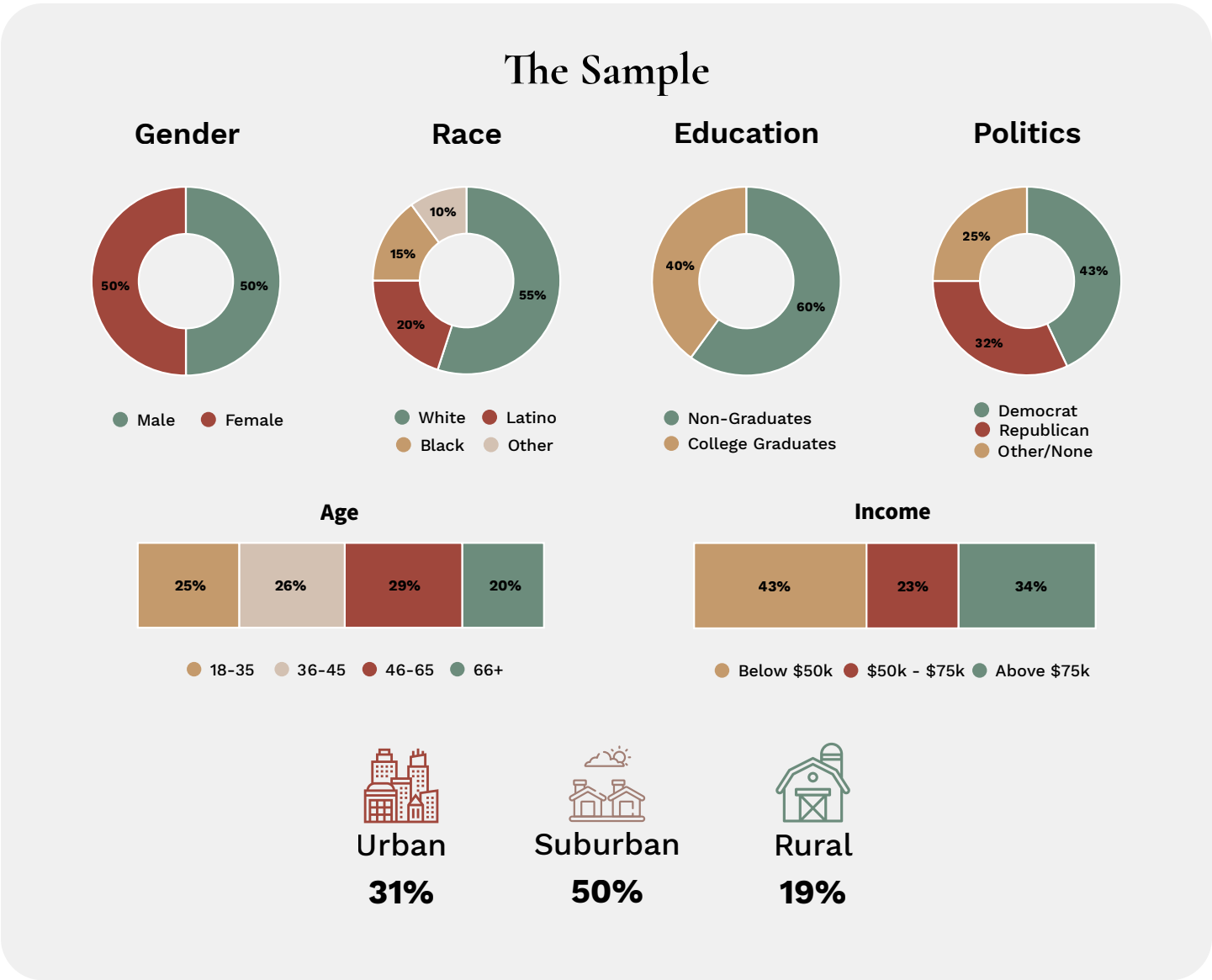
The survey sought to answer questions regarding how people today viewed the pharmaceutical industry in the wake of factors polarizing our national discourse.

Methodology

In March 2024, DOAR surveyed over 2000 jury-eligible respondents from across the United States. The sample was designed to be roughly representative of the national population with regard to region, race/ethnicity, education and income, with adjustments for the criteria for jury service. Respondents were recruited through a survey research firm and the survey was completed online.

The survey focused on the following topics, each of which is discussed in this report:

- Attitudes toward domestic and foreign pharmaceutical companies
- Key issues driving opinions of the pharmaceutical industry
- Experiences with and concerns about prescription drug prices
- The roles COVID-19 vaccines and the recent surge of weight loss drugs play in shaping attitudes toward pharmaceutical companies
- Demographic effects on community attitudes (e.g., race, political affiliation, education)



Findings

OPINIONS OF THE PHARMACEUTICAL INDUSTRY

Consistent with our 2023 research in New Jersey and Delaware, this national survey found that attitudes toward the pharmaceutical industry were more positive than negative. Forty-six percent of respondents described their opinions as generally favorable, 20% as neutral, and 34% as generally unfavorable.

SEVERAL KEY ISSUES DROVE OPINIONS

Respondents were asked how, if at all, three particular issues had influenced their opinions of the pharmaceutical industry: the price of prescription drugs, the development of COVID-19 vaccines, and the opioid epidemic. The most influential of these three was drug pricing; almost 60% said this had changed their opinion of the industry in a negative way. In a close second, 54% said the opioid epidemic changed their opinion, also negatively. The third, factor, however, had a largely positive effect: 41% said the development of vaccines for COVID-19 had improved their opinions of the pharmaceutical industry.

DRUG PRICES AND OPINIONS ABOUT THE PHARMACEUTICAL INDUSTRY

When asked to choose among three categories of costs (research and development, manufacturing, and marketing/advertising) as well as profits made

by pharmaceutical companies and to identify the main driver of prescription drug prices, 60% of the sample chose profits. It is noteworthy that among those who had earlier indicated that their opinions of the industry were negatively influenced by drug prices, 77% thought prices were primarily driven by profits. The widespread attribution of high prices to a profit motive rather than to covering operating costs explains the overwhelming negative view toward high prices.

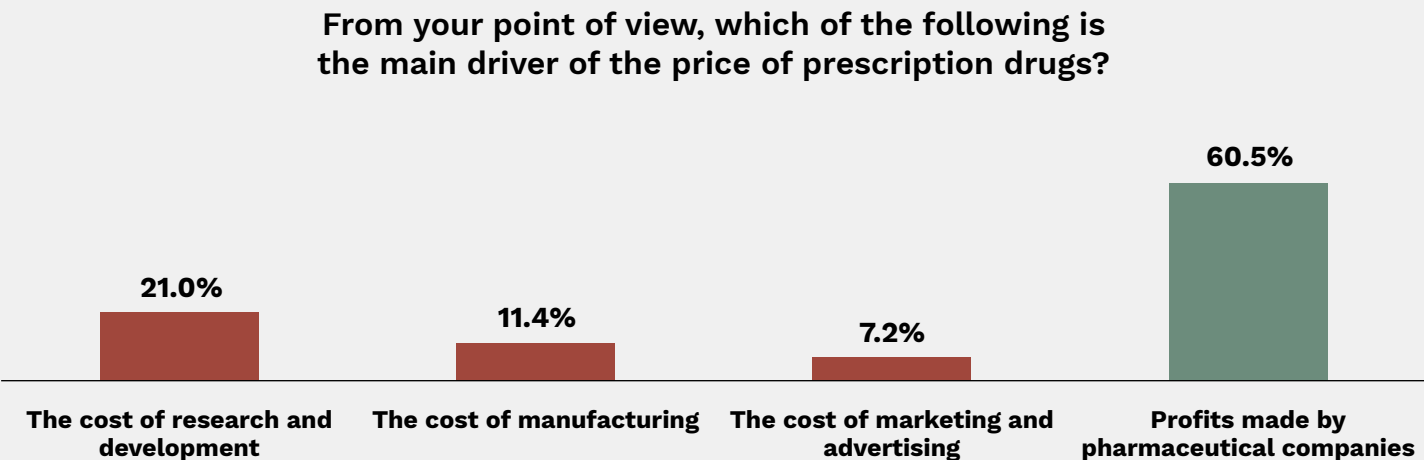
Consistent with this, in a forced-choice question, two-thirds of the sample agreed that the pharmaceutical industry is most concerned with maximizing profits, rather than with the notion that they prioritized saving lives and improving health.

While this belief in the companies' profit motive was widely held, it was more prevalent in some subgroups than others. Those most likely to see profit as the main driver of high prices included:

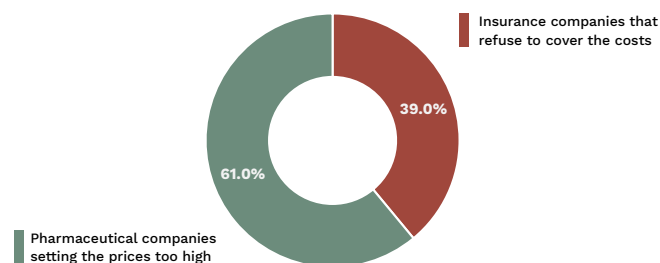
- People who reported worrying about future drug costs
- Those with lower incomes (under \$75k)
- Liberals
- Democrats
- Those age 45 or older
- Women

DRUG PRICING AND WEIGHT-LOSS DRUGS

The survey also revealed other concerns that the American public has regarding pricing of and access to weight-loss drugs like Ozempic and Mounjaro. We asked people who they believed was more responsible for some Americans lacking access to the newest prescription drug treatments:



Who is more responsible for the fact that most people have trouble paying for drugs like Ozempic and Mounjaro?

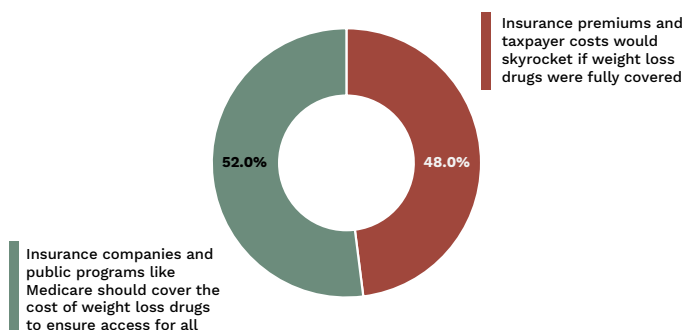


pharmaceutical companies that set prices too high, or insurance companies that refuse to cover the costs. Sixty percent of the sample believed pharmaceutical companies set the prices too high, denying many access to these new drugs. Those most likely to point the finger at the industry (rather than insurers) were:

- Men
- Those under 45
- Urban residents
- Democrats
- Liberals

Interestingly, respondents were more evenly divided on the solution for covering these high costs. In a forced-choice question, just over half agreed that “Insurance companies and public programs like Medicare should cover the cost of weight-loss drugs to ensure access for all” while just under half agreed that “Insurance premiums and taxpayer costs would skyrocket if weight-loss drugs were fully covered.”

Which better reflects your opinion?

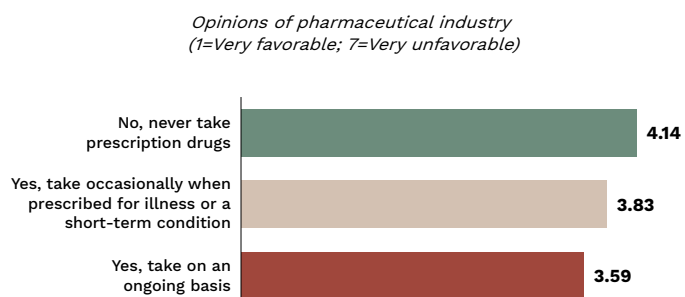


PRESCRIPTION DRUG USE AND OPINIONS ABOUT THE PHARMACEUTICAL INDUSTRY

The data also offers insight into who holds the most positive views of the industry. Strikingly, views were

most favorable among those who took prescription drugs on an ongoing basis. They had the highest favorability scores, followed by those who took such drugs occasionally when prescribed for illness or a short-term condition. The least favorable views were held by those who reported they never took prescription drugs.

Opinions Of Pharma Industry Were Most Favorable Among Those Who Used Prescription Drugs Regularly



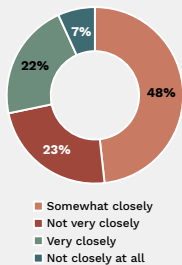
The data suggests that those using prescription drugs regularly have a different perspective on the cost-benefit analysis from those who never take them. This finding is reminiscent of an interesting finding in our 2023 survey, that those who were significantly affected either medically or financially by the COVID-19 pandemic had more favorable views of the pharmaceutical industry and were less likely to attribute high prices to profit motives than were those less affected by the pandemic. Again, we suspect that they recognized and appreciated the massive benefits conferred by the development of vaccines and focused on those more than on cost issues. This pattern is something to bear in mind as we consider how life experiences predispose some jurors to be more or less favorable to litigants in cases involving the pharmaceutical industry.

THE ROLE OF THE OPIOID CRISIS

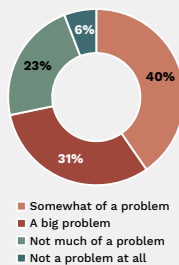
Over half of the sample reported that their views of the pharmaceutical industry had changed negatively as a result of the opioid crisis. The opioid crisis had highly personal relevance for over a third of survey respondents: 35% said they and/or someone close to them had been personally affected by the misuse or abuse of an opioid such as oxycotin or fentanyl.

More broadly, however, respondents perceived opioid abuse as a problem in their communities: 31% saw it as a big problem in the area in which they lived and 40% saw it as somewhat of a problem. Moreover, they were interested and concerned about it; 70% indicated that they followed stories in the

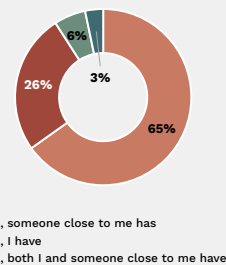
How closely have you followed stories in the media about the opioid crisis?



How much of a problem has opioid abuse been in the area in which you live?



Have you or someone close to you been personally affected by the misuse or abuse of any opioid such as oxycontin or fentanyl?



media about the opioid crisis either very closely (22%) or somewhat closely (48%).

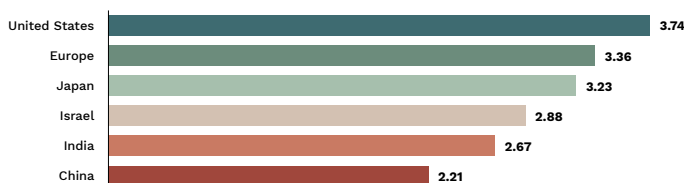
Community exposure to opioids emerged as a significant predictor of feelings about the pharmaceutical industry. The more respondents saw opioids as a big problem where they lived, the more they perceived the industry negatively – and, the more they saw profits as the main driver of prescription drug prices. Perhaps surprisingly, though, those with personal experience with opioid abuse did not view the industry differently than others. It may be that because they had a much closer view of how the abuser (mostly someone close rather than the respondent) accessed the drug and tended to place blame further down in the supply chain – with the doctor prescribing the drug or the dealer selling it, for example.

ATTITUDES TOWARD THE PHARMACEUTICAL INDUSTRY ACROSS THE GLOBE

Respondents were asked to rank their opinions of pharmaceutical companies in six global regions: China, Europe, India, Israel, Japan and the United States. Not surprisingly, the US was ranked most highly (with a mean rating of 3.74/5), followed by Europe (3.36). China received the lowest rating (2.21).

Respondents Rated U.S. Pharmaceutical Companies Highest Among Six Global Regions

Mean Rankings Assigned to Companies in Each Region



A number of factors influenced respondents' views of these global regions and particularly, of

pharmaceutical companies in the US and in China. The strongest of these was political affiliation. Republicans held dramatically more negative views of Chinese companies than did Democrats.

Men and Whites viewed both Chinese companies more negatively and US companies more positively than their demographic counterparts. Additionally, those who lived in suburban or rural areas held particularly negative views of Chinese companies though they did not differ from their counterparts with regard to US companies. Conversely, those with college degrees and those with incomes over \$75,000 (notably, a group less likely than others to be denied care due to cost) held more positive views of US companies than did their counterparts. These data have great utility for jury selection in cases involving Chinese and US litigants¹.

WHO HOLDS THE MOST POSITIVE AND NEGATIVE OPINIONS OVERALL?

Finally, we examined who held the most positive and negative opinions of the pharmaceutical industry. People with the most positive opinions included:

- Those 65 or older
- Those who take prescription drugs regularly (as noted earlier)
- Those with personal income of \$75k or higher
- Conservatives
- Urban residents
- College graduates
- African Americans
- Men

In contrast, those with the most negative opinions were:

- Rural residents
- Those who never take prescription drugs
- Those who do not identify as either Republican or Democrat

¹ Note: Detailed data on the other countries are available upon request.



Key Takeaways and Recommendations

Our findings suggest that opinions of the pharmaceutical industry are generally favorable despite a prevailing view of it as profit-centric.

The Bottom Line

There are several important takeaways from this survey. First, we may still be seeing something of a “COVID bump” in attitudes toward the pharmaceutical industry, so those litigating cases in the immediate future may still see less of the anti-industry bias than they might expect. Evidence suggests, however, that the bump is receding, and the industry is likely to lose the favorability benefit that it briefly gained during the pandemic. In the current survey, pandemic experiences were largely unrelated to attitudes about the pharmaceutical industry, in contrast to the very strong association we saw in our survey last year. As the post-pandemic mode continues to become the new normal, even those who most appreciated the vaccine might lose their appreciation for the industry that developed it.

Second, high drug prices are a major concern for people, and many see these prices as driven largely by profit motives. The majority of survey participants hold a perception that the industry prioritizes profit over patients, which is difficult to change. Teaching jurors about the legitimate costs that go into drug pricing can be very helpful in this regard. Recent research by DOAR has found that jurors often find industry experts more persuasive than academic experts, which could be particularly important when offering jurors a common-sense view of how drug pricing works.

Third, the opioid crisis plays a role in people’s views of pharmaceutical companies. Interestingly, the nature of the crisis in one’s community plays a stronger role in shaping attitudes than more direct personal exposure. This is a useful point to remember when assessing the risks of a particular venue and weighing individual life experiences during jury selection.

Fourth, US companies are likely to have the greatest advantage in litigation involving international companies, and Chinese and Indian companies are likely to have the greatest disadvantage. Using the survey results regarding who holds the most and least favorable attitudes toward each region can maximize your ability to find friendly jurors and minimize the chances of seating a juror biased against your foreign client.

Fifth, opinions about the industry vary based on demographics and life experiences, potentially allowing counsel to identify and challenge those most likely to be biased against their clients. Specifically, the worst jurors for litigants in the pharmaceutical industry are:

- Those most worried about future drug costs
- Those aged 45 or older
- Those with lower incomes (under \$75k)
- People not affiliated with either major political party
- Liberals
- Rural residents
- Women

This list reflects primarily those revealed by this survey to be biased against the pharmaceutical industry but also includes a few groups (e.g., liberals) who are anti-big business and therefore unlikely to be favorable jurors unless your client is an unusually small company.

In closing, the survey findings offer both cause for concern and cause for hope. While a majority of views were negative, we saw more positive views than have been found in other research regarding attitudes toward pharmaceutical companies. Additionally, we were able to identify those who are most likely to hold these views, an encouraging trend. DOAR will continue to track these trends and to report on new findings as they emerge. ■

Email us at inquire@DOAR.com to schedule a partner briefing of our survey findings. Visit DOAR.com to learn more about our trial consulting services and follow us on LinkedIn and X at [@DOARLitigation](https://twitter.com/DOARLitigation).

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About the Author



Ellen Brickman, Ph.D.

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Ellen Brickman, Ph.D., is a Director at DOAR. Ellen manages teams at DOAR in conducting pre-trial research and consulting on all aspects of trial strategy. She is closely involved in theme development, jury selection, and witness preparation.

Ellen has consulted on many high-profile criminal and civil cases, including, among others, white-collar criminal matters, securities litigation, employment matters, and intellectual property cases. She is particularly skilled at designing research to answer complex strategic questions and helping attorneys interpret the research findings and their implications for trial strategy.

Prior to DOAR, Ellen conducted research in social-service settings, and has also taught courses in social psychology and in research methodology at New York University, the New School for Social Research, and Fordham University. She has also published articles on many aspects of trial strategy and has presented widely to attorneys and judges.

Ellen holds a Bachelor of Arts degree in English and psychology from Barnard College, and a Ph.D. in social psychology from Columbia University.



Chad Lackey, Ph.D.

Director, Trial Consulting

Chad Lackey Ph.D. is a Director in DOAR's jury consulting practice. He has extensive experience designing and conducting focus group, survey, and mock trial research to test the persuasiveness of case themes and arguments. Additionally, he routinely partners with clients throughout all aspects of jury selection, including helping clients negotiate issues with the court and opposing counsel, identifying personal experiences and attitudes that bias deliberations and decision making, and drafting and grading supplemental juror questionnaires.

Dr. Lackey has a widespread consulting background. He has consulted on hundreds of civil and criminal matters across the country involving employment, complex commercial, insurance, patent, insider trading, child sexual abuse, securities fraud, murder, political corruption, terrorism, and the death penalty.

Dr. Lackey has a Ph.D. from the University of Colorado Boulder. He regularly lectures on jury selection and presentation strategy to civil, criminal, and regulatory attorneys.



Natalie Gordon, Ph.D.

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Natalie Gordon, Ph.D., is a Consultant at DOAR with extensive experience in navigating complex civil and white-collar criminal litigation. She is adept at mitigating the effects of pre-trial publicity and media attention on cases in selecting an impartial jury. Natalie has contributed to high-profile matters such as In Re: National Prescription Opioid Litigation, In Re Petrobras, U.S. v. Boustani, U.S. v. Senator Robert Menendez, U.S. v. Tom Barrack, U.S. v. Jayson Penn et al. (on behalf of Bill Lovette), U.S. v. David Sidoo et al. (on behalf of John Wilson), U.S. v. Jie "Jack" Zhao, U.S. v. Gatto, SEC v. AT&T, Sean Rad et al. v. IAC InterActiveCorp et al., Monster Energy v. Bang, and Ambac v. Countrywide.

With a Ph.D. in psychology and law, featuring a dual specialization in basic and applied social psychology from John Jay College of Criminal Justice, Natalie combines deep theoretical knowledge with practical application. She also holds a Bachelor of Arts degree in psychology and philosophy from the University of California, Santa Barbara, and a Master's degree in experimental psychology from the University of Colorado.

ABOUT DOAR

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