

Memorandum: Consumer Polling Data

ClearPath Strategies Poll—April 2021

- Please rate your feelings toward some people and organizations from 1 to 10, where 10 means VERY FAVORABLE; 0 means VERY UNFAVORABLE; and 5 means NEUTRAL. (among Democratic voters)
 - President Joe Biden: 89% favorable; 5% unfavorable; 6% neutral
 - Scientists and researchers that developed COVID-19 vaccines: 84% favorable; 7% unfavorable; 9% neutral
 - Medical scientists and researchers: 82% favorable; 6% unfavorable; 12% neutral
 - Companies that developed COVID-19 vaccines: 81% favorable; 7% unfavorable; 12% neutral
 - Dr. Anthony Fauci: 78% favorable; 8% unfavorable; 14% neutral
 - The Affordable Care Act (aka Obamacare): 76% favorable; 8% unfavorable; 15% neutral
 - Pharmaceutical companies: 60% favorable; 18% unfavorable; 21% neutral
 - Health insurance companies: 56% favorable; 21% unfavorable; 23% neutral
- PAIRS. Now you will see some pairs of statements. For each one, indicate which choice comes closer to your point of view. Would you say that statement is much or somewhat closer to your point of view? GOVT. Overall, do you think the US government's involvement in health care is...? (among Democratic voters)
 - The development and distribution of the COVID-19 vaccine represents a rare collaboration of pharmaceutical companies, the government, and health insurance companies.
 - 12% very close to point of view; 11% somewhat close to point of view
 - The COVID-19 vaccine development shows how well the system can work together to solve the big problems and should be a model for solving other public health crises like Alzheimer's, cancer, diabetes.
 - 29% very close to point of view; 17% somewhat close to point of view.
- Here is a series of statements. For each one, please tell me the extent to which you agree or disagree with the statement. (among Democratic voters)
 - Making quality health care affordable is a moral imperative: 61% strongly agree; 28% somewhat agree; 8% neither agree nor disagree; 1% somewhat disagree; 2% strongly disagree
 - Discounts should be passed on directly to the consumer: 53% strongly agree; 31% somewhat agree; 10% neither agree nor disagree; 3% somewhat disagree; 3% strongly disagree
 - The COVID-19 vaccines shows how much we can do when we collaborate: 51% strongly agree; 32% somewhat agree; 11% neither agree nor disagree; 4% somewhat disagree; 2% strongly disagree
 - There are too many middle men taking a cut of profits from health care costs: 50% strongly agree; 35% somewhat agree; 11% neither agree nor disagree; 2% somewhat disagree; 2% strongly disagree

- What we need is predictable health care costs for good quality coverage: 49% strongly agree; 36% somewhat agree; 11% neither agree nor disagree; 2% somewhat disagree; 2% strongly disagree
- The government should cap drug costs at a more affordable amount: 43% strongly agree; 44% somewhat agree; 9% neither agree nor disagree; 3% somewhat disagree; 1% strongly disagree
- People should be able to pay a flat, predictable amount for prescription drugs: 41% strongly agree; 34% somewhat agree; 15% neither agree nor disagree; 6% somewhat disagree; 4% strongly disagree
- Our government should negotiate drug prices directly with pharmaceutical companies: 41% strongly agree; 40% somewhat agree; 14% neither agree nor disagree; 4% somewhat disagree; 1% strongly disagree
- We need single payer or universal health care: 37% strongly agree; 30% somewhat agree; 24% neither agree nor disagree; 6% somewhat disagree; 3% strongly disagree
- Government should play the role of honest broker in health care: 37% strongly agree; 42% somewhat agree; 15% neither agree nor disagree; 4% somewhat disagree; 2% strongly disagree
- Out-of-pocket costs and insurance premiums are rising, making health care unaffordable: 36% strongly agree; 40% somewhat agree; 17% neither agree nor disagree; 4% somewhat disagree; 3% strongly disagree
- Negotiations would ensure lower prices, comparable to what other similar countries pay: 35% strongly agree; 43% somewhat agree; 16% neither agree nor disagree; 4% somewhat disagree; 2% strongly disagree
- From the following list, who do you think should get credit for the development of the COVID-19 vaccines? Select all that apply.
 - Scientists: 73% total, 69% Moderate/Conservative, 77% Liberal
 - Pharmaceutical companies: 52% total, 48% Moderate/Conservative, 56% Liberal
 - Doctors and medical professionals: 44% total, 38% Moderate/Conservative, 48% Liberal
 - Academic research institutions: 31% total, 24% Moderate/Conservative, 39% Liberal
 - The US Government: 27% total, 33% Moderate/Conservative, 22% Liberal
 - State and Local governments: 14% total, 18% Moderate/Conservative, 11% Liberal
 - Health Insurance Companies: 14% total, 17% Moderate/Conservative, 10% Liberal
 - Other: 1% total, 1% Moderate/Conservative, 0% Liberal
- HCSS. From this list, which TWO actions do you think will help address the issue of health care costs the most? (among Democratic voters)
 - Lower the cost of health insurance premiums: 33%
 - Regulate health care provider prices: 29%
 - Reduce out-of-pocket costs for patients: 26%
 - Eliminate waste and excessive administrative costs in health care: 23%

- Improve protections for people with pre-existing conditions: 20%
- Eliminate surprise billing from hospitals: 19%
- Let government negotiate drug prices with drug manufacturers: 19%
- Require more transparency from insurers: 12%
- Address racial equity in health care access and outcomes: 12%
- CONCERNS. Here is a list of some issues impacting society. From this list, choose the TOP THREE issues that are your biggest concerns TODAY. (among Democratic voters)
 - COVID-19 vaccines: 54%
 - The economy and unemployment: 45%
 - The environment and climate change: 38%
 - Reopening and lifting COVID restrictions: 33%
 - Social justice issues (Gender equality, race relations, LGBTQI rights): 29%
 - Your/your family's finances: 26%
 - Access to and availability of health care: 23%
 - Your/your family's mental health: 18%
 - School reopening/Virtual schooling: 12%
 - Natural disasters: 10%
- MESSAGES. Now here are some messages about ways to reduce prescription drug costs. For each message, would you say the message is a very convincing way to reduce prescription drug costs, somewhat convincing, a little convincing, or a not at all convincing way to reduce prescription drug costs? (among Democratic voters)
 - The COVID-19 vaccine development process is what happens when the government and pharmaceutical companies collaborate to solve global problems. This approach should be scaled to cure other diseases, provide affordable prescription medicines, and increase the ability for innovation.
 - 48% very convincing; 31% somewhat convincing
 - It is not fair that Americans pay multiple times more than people in other countries for the same medicine. One way government negotiation gets us to lower drug prices is by tying our prices to the prices of the same medicines in other rich, developed countries. This would allow Americans to receive the same, often lower, prices for prescription medicines that are available in other countries such as Canada and the United Kingdom.
 - 40% very convincing; 39% somewhat convincing
 - With no cap on out-of-pocket drug costs, many seniors with Medicare Part D are at risk of going into debt to cover their prescriptions—even after reaching their annual maximum out-of-pocket costs (\$6,500 out-of-pocket), enrollees are still required to pay a copay. This is unfair. The annual cap should stop co-pays entirely, which are already too high and unpredictable.
 - 43% very convincing; 35% somewhat convincing
 - The easiest way for us to reduce costs of prescription drugs is to cut out the costs incurred by third-party middle men. Pharmaceutical companies give over \$100 billion annually in rebates and discounts on prescription drugs, but those aren't passed on to people at the pharmacy counter. Instead, they are taken by insurance companies and other middle men, like pharmacy benefit managers,

who don't provide any added value. If we address this flaw in the system and pass on rebates directly to patients, we will be able to reduce drug costs.

- 40% very convincing; 38% somewhat convincing

Morning Consult Tracking Poll – February 2021

- Top three health care issues for policymakers to address (out of 15 options) (among conservative voters):
 - 28% Health Insurance Coverage and Costs
 - 22% Coronavirus
 - 19% Distributing a vaccine
 - 19% Reducing out-of-pocket costs
 - 15% Ensuring seniors' access to Medicare/Protecting Medicare
 - 14% Protecting patients with pre-existing conditions
 - 13% Reducing waste and excessive administrative costs
 - 10% Developing new treatments and cures
- Below are some potential ways to lower the cost of health care in this country. For each one, please indicate whether you support or oppose the idea (among conservative voters):
 - 82% Place a cap on the amount health insurers can make patients pay out of their pocket for deductibles, copays and other out-of-pocket costs.
 - 82% Reduce wasteful spending in health care by eliminating unnecessary procedures, duplicate testing, and administrative overhead.
 - 82% Give health insurers more incentives to keep costs of health plans manageable for people who are sick and take prescription medicines.
 - 77% Require hospitals to reduce administrative overhead and put that money into doctors, nurses and other patient care.
 - 46% Moving toward a more socialist approach to health care in the U.S.
 - 45% Have a single government-run health insurance system where the government pays for all of the health care, sets all of the prices and decides what medicines and services are covered under a single health plan that covers all Americans.

Morning Consult Tracking Poll, May 7-10, 2021

- Which is closer to your view, even if neither is exactly right? The U.S. should build upon successful U.S. manufacturing of COVID-19 vaccines to increase global supply, donate excess doses and increase licensing agreements with foreign manufacturers to increase supply.
 - 56% Registered Voters
- How concerning, if at all, are each of the following potential outcomes of the TRIPS waiver? Flooding the market with vaccine producers and vaccines will create confusion and heighten concerns about the possibility of counterfeit vaccines
 - 31% Very Concerning
 - 34% Somewhat Concerning
- How concerning, if at all, are each of the following potential outcomes of the TRIPS waiver? With this decision, unproven vaccine manufacturers will now compete with U.S. manufacturers for already scarce resources

- 26% Very Concerning
- 35% Somewhat Concerning

OMI – April 2021

- Top issues voters are concerned about (among conservative voters)
 - 19% Personal Liberty issues
 - 15% Cultural/Moral issues
 - 11% National Security issues
 - 11% Health Care issues
 - 9% Fiscal Responsibility issues
 - 9% Economic Growth issues
- Now I'm going to read you some issues facing our country. Please tell me which type of issue concerns you most.
 - Immigration/Border: 25%
 - Economy: 13%
 - Coronavirus: 12%
 - Joe Biden: 5%
 - Democrats: 5%
 - Government Spending: 4%
- I AM GOING TO READ SOME NAMES OF PEOPLE AND ORGANIZATIONS IN THE NEWS. FOR EACH ONE, PLEASE TELL ME, FIRST WHETHER YOU'VE HEARD OF THE PERSON, THEN, IF SO, PLEASE TELL ME WHETHER YOU HAVE A FAVORABLE OR UNFAVORABLE IMPRESSION OF THE PERSON. IF I NAME SOMEONE YOU DON'T KNOW MUCH ABOUT, JUST TELL ME AND WE'LL GO ON TO THE NEXT ONE. "COVID-19 VACCINE DEVELOPERS" (among conservative voters)
 - 73.8% Total Favorable
 - 43.7% Very Favorable
 - 30.1% Somewhat Favorable
 - 16.7% Total Unfavorable
 - 10.4% Very Unfavorable
 - 6.3% Somewhat Unfavorable
 - 9.5% No Opinion
- RECENTLY, NANCY PELOSI AND DEMOCRATS IN WASHINGTON HAVE PROPOSED A NEW HEALTH CARE LAW THAT WOULD CREATE PRICE CONTROLS ON PHARMACEUTICAL MEDICINES. I AM GOING TO GIVE YOU SHORT DESCRIPTIONS OF CONCERNS THAT HAVE BEEN EXPRESSED REGARDING THIS DRUG PRICING AND HEALTH CARE PROPOSAL. PLEASE TELL ME IF EACH ONE MAKES YOU CONCERNED, OR IF YOU ARE NOT CONCERNED. (among conservative voters)
 - Pelosi's plan would allow government to determine the value of your medicine, and whether or not you still have access to it. (9% somewhat concerned, 82% very concerned)
 - Pelosi's plan would create national security risks by making America more dependent on medical manufacturing in countries like China. (9% somewhat concerned, 81% very concerned)

- Pelosi's plan would give away American intellectual property developed by U.S. drug manufacturers to other countries like China who refuse to pay their fair share for medicines developed in the United States. (12% somewhat concerned, 78% very concerned)
- Pelosi's plan would increase taxes on pharmaceuticals; most of this money would be used to fund liberal government wish-list items rather than reducing patient costs. (8% somewhat concerned, 81% very concerned)
- Pelosi's bill would lead to the permanent loss of 1 million well-paying U.S. jobs across the pharmaceutical manufacturing industry and companies supporting them like the trucking industry. (10% somewhat concerned, 79% very concerned)
- Republicans in Congress have proposed an alternative plan to reduce the consumer cost of pharmaceutical medicines. It would speed up the development of generic drugs and increase competition, focus on eliminating wasteful spending, increase drug pricing transparency for consumers, set an annual maximum on seniors' out-of-pocket drug costs, and preserve America's drug innovation pipeline and private sector so we are not dependent on foreign countries. Do you favor or oppose this plan? (among conservative voters)
 - 57% Strongly favor
 - 22% Somewhat favor
 - 7% Somewhat oppose
 - 8% Strongly oppose
 - 7% Don't Know/Refused
- Who deserves most credit for COVID vaccines? (among conservative voters)
 - 52% Trump Administration
 - 32% Pfizer/Moderna
 - 8% Government Agencies
 - 8% Don't Know/Refused
- NEXT ARE A FEW WAYS TO POTENTIALLY LOWER THE COST OF HEALTH CARE IN THIS COUNTRY. FOR EACH ONE PLEASE TELL ME IF YOU SUPPORT OR OPPOSE THE PROPOSAL. (among conservative voters)
 - 88% Increase competition between Pharmaceutical companies and get generic medicines into the marketplace more quickly
 - 87% Work with Health insurers to reduce what they charge patients for deductibles, co-pays, and other out-of-pocket costs
 - 85% Work with hospitals to reduce administrative overhead and put that money into Doctors, nurses and other patient care
 - 85% Give Health Care insurers more incentives to keep costs of Health plans manageable for people who are sick and take prescription Medicines
 - 78% Reduce wasteful spending in Health Care by eliminating unnecessary procedures, duplicate testing, and administrative overhead
 - 17% Move toward a socialist approach to health care in the United States
- I AM GOING TO READ TWO STATEMENTS FROM REPUBLICAN CONGRESSMEN, PLEASE TELL ME WHICH ONE YOU AGREE WITH MORE, EVEN IF NEITHER IS EXACTLY RIGHT.

DEMOCRATS' PROPOSALS ON HEALTH CARE WILL CREATE A SOCIALIZED MEDICINE SYSTEM THAT WILL DESTROY THIS COUNTRY BY GUTTING MEDICARE, PUTTING UNELECTED BUREAUCRATS IN CHARGE OF YOUR CARE, AND WILL DESTROY INNOVATION WHILE SUBSIDIZING OTHER COUNTRIES' HEALTH CARE. (among conservative voters)

- 46.5% Agree
 - 63.5% Very Conservative
 - 29.6% Moderate
 - 48.9% Somewhat Conservative
- I AM GOING TO READ TWO STATEMENTS FROM REPUBLICAN CONGRESSMEN, PLEASE TELL ME WHICH ONE YOU AGREE WITH MORE, EVEN IF NEITHER IS EXACTLY RIGHT. DEMOCRATS' PROPOSALS ON HEALTH CARE ARE EXTREME, BUT REPUBLICANS SHOULD FOCUS ON THE GOALS OF REDUCING OUT OF POCKET COSTS, INCREASING COMPETITION AND INCREASING TRANSPARENCY EVEN IF THAT MEANS WORKING ACROSS THE AISLE. REPUBLICANS NEED TO PRIORITIZE PATIENTS OVER PARTISAN BICKERING.
 - 44.7% Agree
 - 29.0% Very Conservative
 - 63.8% Moderate
 - 43.8% Somewhat Conservative

Consumers for Quality Care

- 80% of voters agree that health care costs are continuing to climb yearly, and premiums, copays, and deductibles topped the list of concerns with their own health care (among registered voters).
- 70% of voters feel like insurance companies are nickel-and-diming them with all of the out-of-pocket costs they have to pay (among registered voters).
- 92% of voters agree insurance deductibles should be low enough that they don't get in the way of getting the health care you need (among registered voters).
- 79% of voters think we need to be cautious about changes we make to the stressed health care system coming out of COVID-19 (among registered voters).

Public Opinion Strategies Tracking Poll – December 2020

- 87% of voters agree the coronavirus pandemic has shown the large and important role drug companies have in research and development for discovering new treatments, cures and vaccines. (among registered voters)

Public Opinion Strategies Tracking Poll – April 2021

- I am going to read you some more statements about biopharmaceutical companies. For each one, please tell me whether you strongly agree, somewhat agree, somewhat disagree, strongly disagree or neither agree nor disagree with the statement. The (first/next) one is... It is important for the country to have a strong biopharmaceutical industry.
 - 55% Strongly Agree
 - 31% Somewhat Agree
 - 5% Somewhat Disagree

- 2% Strong Disagree
- 6% Neither
- 1% Don't Know
- I am going to read you some statements you could hear about biopharmaceutical companies. For each one, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the statement. The (first/next) one is... Scientists and researchers at America's biopharmaceutical companies are making amazing discoveries that are improving our health.
 - 44% Strongly Agree
 - 39% Somewhat Agree
 - 10% Somewhat Disagree
 - 5% Strongly Disagree
 - 2% Don't Know
- I am going to read you some statements you could hear about the coronavirus. For each one, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the statement. The (first/next) one is... The coronavirus pandemic has shown the large and important role drug companies have in research and development for discovering new treatments, cures and vaccines.
 - 46% Strongly Agree
 - 38% Somewhat Agree
 - 6% Somewhat Disagree
 - 7% Strongly Disagree
 - 2% Don't Know/No Opinion
 - 1% Refused
- I am going to read you some statements you could hear about the coronavirus. For each one, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the statement. The (first/next) one is... The coronavirus pandemic has shown how much we can accomplish when the private and public sectors work together to solve global problems, and we should use that to attack other issues like health care affordability.
 - 48% Strongly Agree
 - 31% Somewhat Agree
 - 8% Somewhat Disagree
 - 10% Strongly Disagree
 - 2% Don't Know/No Opinion
 - 1% Refused

Future Majority Health Care Poll – February 2021

- 82% agree it is important the biopharmaceutical companies and vaccine makers have adequate funds to discover, develop and test new drugs.

Morning Consult Tracking Poll – November 2020

- % agree with the statement: We should not make health care more political by allowing bureaucrats to pick and choose which medicines Americans should get through government price-setting schemes.
 - 80% - Conservative voters

- 72% - Moderate voters
 - 65% - Liberal voters
- 77% agree with the statement: Keeping a strong American biopharmaceutical industry is a matter of national security to protect us from future pandemics (among registered voters).