

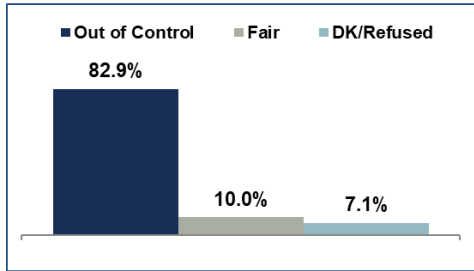
TO: INTERESTED PARTIES
FROM: ROBERT JONES, GS STRATEGY GROUP
RE: NATIONAL PRESCRIPTION DRUG RESEARCH
DATE: 03.31.20

GS Strategy Group conducted a poll on behalf of Patients for Affordable Drugs Now in the U.S. The telephone survey was conducted March 7-11, 2020 among 1,000 likely voters nationwide. The margin of error for the survey is +/- 3.1% at the 95% confidence level. Below are some key findings from that research.

Overwhelmingly, and across party lines, voters believe prescription drug prices are out of control and the system needs to undergo major reforms.

Which of the following comes closest to your own opinion about prescription drug pricing in the United States?

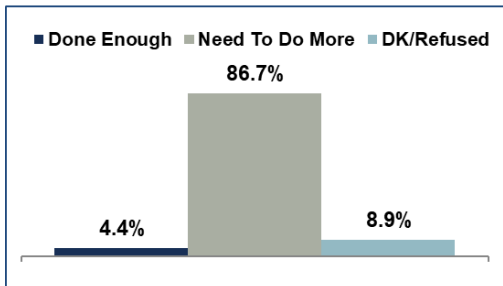
- It needs to undergo major reforms to rein in out of control prices
- It is fair for the high quality of care, innovation and access we have to cures, we shouldn't make any changes.



	Overall	Party		
		Dem	Indy	GOP
Out of Control	82.9	89.3	83.0	76.9
Fair	10.0	5.5	9.3	15.2
Net	+72.9	+83.7	+73.7	+61.7

Voters want the United States Senate to do more to lower the cost of prescription drugs, including 81% of Republicans.

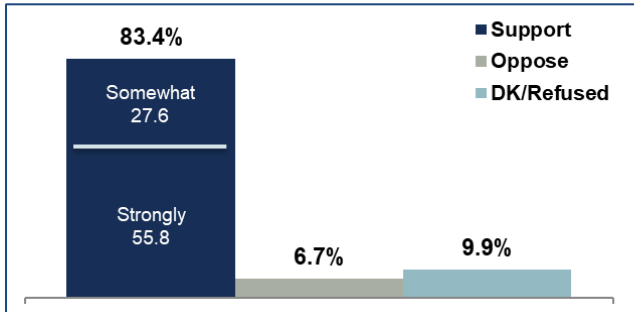
Do you think the United States Senate has done enough to lower the cost of prescription drugs or do they need to do more?



	Overall	Party		
		Dem	Indy	GOP
Done Engh.	4.4	0.5	5.5	7.4
Need More	86.7	94.7	84.5	80.9
Net	+82.3	+94.3	+79.0	+73.5

The Prescription Drug Pricing Reduction Act is supported by 83% of voters – bridging the divide between polarized political parties.

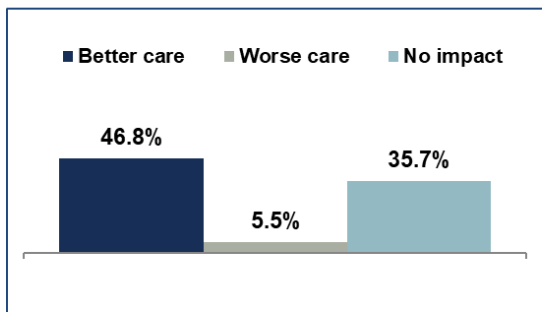
A bipartisan bill in the United States Senate called the Prescription Drug Pricing Reduction Act aims to stop price gouging and lower seniors' out-of-pocket costs on prescription drugs. It accomplishes this goal by penalizing drug companies for increasing prices faster than the rate of inflation and putting a cap on the amount Medicare beneficiaries pay out of pocket for prescription drugs each year. Hearing this, would you say you support or oppose this Bill?



	Overall	Party			Gender	
		Dem	Indy	GOP	Male	Female
Support	83.4	86.6	80.8	83.5	79.4	87.1
Strongly	55.8	58.7	49.2	58.0	50.5	60.7
Oppose	6.7	4.9	6.9	7.7	9.5	4.1
Net	+76.7	+81.7	+73.9	+75.8	+69.9	+83.0

8 in 10 Americans do not believe the drug industry's argument that patients will receive worse care under the Prescription Drug Pricing Reduction Act.

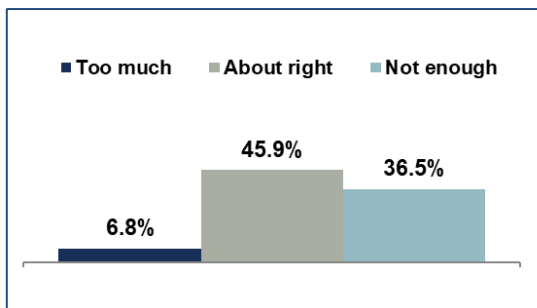
Do you think these changes would result in patients receiving better care, worse care or would it have no impact on the care that patients receive?



	Overall	Party		
		Dem	Indy	GOP
Better	46.8	57.6	42.5	39.7
Worse	5.5	5.0	4.5	5.9
No Impact	35.7	27.2	38.2	43.7

82% of voters reject Big Pharma's claim that inflation penalties are too harsh.

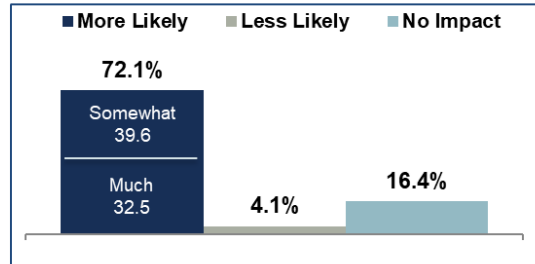
Under a current version of the bill, drug companies would have to pay a penalty back to Medicare if they increase the price of a prescription drug faster than inflation. The penalty is equal to how much they raise the price over inflation. Do you think this penalty is too much, about right, or not enough?



	Overall	Party		
		Dem	Indy	GOP
Too Much	6.8	3.8	9.6	7.2
About Right	45.9	42.3	51.1	46.8
Not Enough	36.5	45.7	28.2	33.7

Nearly 3/4 of respondents say they would be more likely to vote for a candidate for Senate who supports the Prescription Drug Pricing Reduction Act.

If a candidate running for the United States Senate in your state supported this bill, would you be more likely or less likely to vote for him or her?



	Overall	Party			Gender	
		Dem	Indy	GOP	Male	Female
More Likely	72.1	79.9	68.6	68.4	67.5	76.3
Less Likely	4.1	2.4	5.1	4.7	6.3	2.0
Net	+68.0	+77.5	+63.5	+63.7	+61.2	+74.3



PATIENTS FOR AFFORDABLE DRUGS NATIONAL SURVEY

CONDUCTED MARCH 7 – 12, 2020

N = 1000 Likely Voters Nationwide

Margin of Error: +/- 3.1%

Table 1-1

Q1. When there is an election for president, do you always vote, almost always vote, vote most of the time, vote some of the time, hardly ever vote, or never vote?

	Total
Total	1000
Always	87.3
Almost always	5.9
Most of time	4.1
Sometimes	2.7

Table 2-1

Q2. For statistical purposes, what is your age?

	Total
Total	1000
18-34	21.6
18-29	13.2
30-34	8.5
35-44	20.2
35-39	9.9
40-44	10.4
45-54	15.0
55-64	20.7
55-60	13.5
61-64	7.3
65+	22.4
Mean	49.2

Table 3-1

Q3. Gender:

(NET DIF 1 - Percent male minus percent female)

	Total

Total	1000
Male	48.0
Female	52.0
NET DIF 1	-4.0

Table 4-1

Q4. Are you Latino, Hispanic or of Latino, Hispanic or Spanish descent?

(NET DIF 1 - Percent yes minus percent no)

	Total

Total	1000
Yes	10.4
No	89.6
NET DIF 1	-79.2

Table 5-1

Q5. What is your race?

	Total

Total	1000
White	72.2
Non-White	25.9
Black	9.5
Hispanic	10.4
Asian	2.2
Other	3.8
DK/Refused	1.9

Table 6-1

Q6. If you had to label yourself, would you say you are a liberal, a moderate or a conservative in your political beliefs?
 (NET DIF 1 - Percent Conservative minus percent Liberal)

	Total

Total	1000
Liberal	27.0
Very Liberal	14.2
Somewhat Liberal	12.8
Moderate	34.3
Conservative	34.4
Somewhat Conservative	15.2
Very Conservative	19.2
DK/Refused	4.3
NET DIF 1	7.4

Table 7-1

Q7. With which political party are you registered?
 (NET DIF 1 - Percent Republican minus percent Democrat)

	Total

Total	1000
Republican	33.2
Democrat	35.8
Independent/No Party	27.5
Other	1.6
DK/Refused	1.9
NET DIF 1	-2.6

Table 8-1

Please tell me whether you have a favorable or unfavorable opinion of each of the following people. If you have no opinion or have never heard of them, just say so.

Q8. Donald Trump

(NET DIF 1 - Percent favorable minus percent unfavorable)

	Total

Total	1000
Favorable	43.3
Very Favorable	30.0
Somewhat Favorable	13.3
Unfavorable	51.2
Somewhat Unfavorable	6.2
Very Unfavorable	45.0
No opinion	4.9
Never heard of	0.2
DK/Refused	0.4
Mean	2.7
NET DIF 1	-7.9

Table 9-1

Q9. Pharmaceutical companies

(NET DIF 1 - Percent favorable minus percent unfavorable)

	Total

Total	1000
Favorable	21.2
Very Favorable	5.4
Somewhat Favorable	15.8
Unfavorable	60.2
Somewhat Unfavorable	22.9
Very Unfavorable	37.3
No opinion	17.6
Never heard of	0.4
DK/Refused	0.6
Mean	3.1
NET DIF 1	-39.0

Table 10-1

Q10. Mitch McConnell

(NET DIF 1 - Percent favorable minus percent unfavorable)

	Total

Total	1000
Favorable	24.0
Very Favorable	7.2
Somewhat Favorable	16.8
Unfavorable	46.9
Somewhat Unfavorable	12.2
Very Unfavorable	34.7
No opinion	20.1
Never heard of	8.5
DK/Refused	0.5
Mean	3.0
NET DIF 1	-22.9

Table 11-1

Q11. Joe Biden

(NET DIF 1 - Percent favorable minus percent unfavorable)

	Total

Total	1000
Favorable	44.3
Very Favorable	16.0
Somewhat Favorable	28.2
Unfavorable	45.6
Somewhat Unfavorable	15.9
Very Unfavorable	29.6
No opinion	9.2
Never heard of	0.6
DK/Refused	0.3
Mean	2.7
NET DIF 1	-1.3

Table 13-1

Q12. If the election for President of the United States was held today and the candidates were Joe Biden, the Democrat, and Donald Trump, the Republican, for whom would you vote?
 (NET DIF 1 - Percent Trump minus percent Biden)

	<u>Total</u>
Total	1000
Biden	48.2
Definitely Biden	40.8
Probably Biden	7.4
Trump	41.6
Definitely Trump	36.3
Probably Trump	5.2
Undecided	10.3
NET DIF 1	-6.6

Table 14-1

Q13. Which party do you prefer control the United States Senate - the Democratic Party or the Republican Party?
 (NET DIF 1 - Percent Republican minus percent Democrat)

	<u>Total</u>
Total	1000
Democratic Party	45.1
Republican Party	42.0
DK/Refused	12.9
NET DIF 1	-3.1

Table 15-1

Q14. Which of the following comes closest to your own opinion about prescription drug pricing in the United States?
 (NET DIF 1 - Percent undergo changes minus percent no changes)

	Total

Total	1000
It needs to undergo major reforms to rein in out of control prices	82.9
It is fair for the high quality of care, innovation and access we have to cures, we shouldn't make any changes.	10.0
DK/Refused	7.1
NET DIF 1	72.9

Table 16-1

Q15. How much have you heard about prescription drug companies increasing their prices?
 (NET DIF 1 - Percent a lot/a little minus percent not very much/nothing)

	Total

Total	1000
A lot/A Little	77.4
A lot	50.6
A little	26.7
Not Very Much/Nothing	21.8
Not very much	13.9
Nothing	7.9
DK/Refused	0.8
NET DIF 1	55.5

Table 17-1

Q16. Do you think the United States Senate has done enough to lower the cost of prescription drugs or do they need to do more?
 (NET DIF 1 - Percent done enough minus percent need to do more)

	Total

Total	1000
Done enough	4.4
Need to do more	86.7
DK/Refused	8.9
NET DIF 1	-82.4

Table 18-1

Q17. Do you think President Trump has done enough to lower the cost of prescription drugs or does he need to do more?
 (NET DIF 1 - Percent done enough minus percent need to do more)

	Total

Total	1000
Done enough	8.8
Need to do more	79.6
DK/Refused	11.7
NET DIF 1	-70.8

Table 19-1

Q18. On a scale of 1-10, with 1 being strongly oppose and 10 being strongly support, how would you rate your feelings about President Trump's call to lower prescription drug prices?

	Total

Total	1000
8 to 10	43.6
10	32.1
9	4.2
8	7.3
4 to 7	26.8
7	6.6
6	4.9
5	13.1
4	2.2
1 to 3	17.2
3	3.0
2	2.8
1	11.5
DK/Refused	12.4
Mean	6.8

Table 20-1

Q19. Thinking about your vote in this year's United States Senate election, how important are the candidate's positions on lowering prescription drug prices in deciding who to vote for?
(NET DIF 1 - Percent important minus percent unimportant)

	Total

Total	1000
Important	77.7
Very Important	33.7
Somewhat Important	44.1
Unimportant	19.5
Not Too Important	12.5
Not Important at all	7.0
DK/Refused	2.8
Mean	1.9
NET DIF 1	58.2

Table 21-1

Q20. A bipartisan bill in the United States Senate called the Prescription Drug Pricing Reduction Act aims to stop price gouging and lower seniors' out-of-pocket costs on prescription drugs. It accomplishes this goal by penalizing drug companies for increasing prices faster than the rate of inflation and putting a cap on the amount Medicare beneficiaries pay out of pocket for prescription drugs each year. Hearing this, would you say you support or oppose this Bill?
(NET DIF 1 - Percent support minus percent oppose)

	Total

Total	1000
Support	83.4
Strongly Support	55.8
Somewhat Support	27.6
Oppose	6.7
Somewhat Oppose	3.3
Strongly Oppose	3.4
DK/Refused	9.9
Mean	1.5
NET DIF 1	76.7

Table 22-1

Q21. Do you think these changes would result in patients receiving better care, worse care or would it have no impact on the care that patients receive?
(NET DIF 1 - Percent better minus percent worse)

	Total

Total	1000
Better care	46.8
Worse care	5.5
No impact	35.7
DK/Refused	12.0
NET DIF 1	41.3

Table 23-1

Q22. If a candidate running for the United States Senate in your state supported this bill, would you be more likely or less likely to vote for him or her?
 (NET DIF 1 - Percent more likely minus percent less likely)

	<u>Total</u>
Total	1000
More likely	72.1
Much More likely	32.5
Somewhat More likely	39.6
Less likely	4.1
Somewhat Less likely	2.7
Much Less likely	1.4
No impact	16.4
DK/Refused	7.5
Mean	2.2
NET DIF 1	68.0

Table 24-1

Q23. Which type of United States Senate candidate would you be more likely to vote for?
 (NET DIF 1 - Percent supports minus percent opposes)

	<u>Total</u>
Total	1000
A candidate who supports the Prescription Drug Pricing Reduction Act.	82.2
A candidate who opposes the Prescription Drug Pricing Reduction Act.	3.8
DK/Refused	13.9
NET DIF 1	78.4

Table 25-1

Q24. Under a current version of the bill, drug companies would have to pay a penalty back to Medicare if they increase the price of a prescription drug faster than inflation. The penalty is equal to how much they raise the price over inflation. Do you think this penalty is too much, about right, or not enough?

	<u>Total</u>
Total	1000
Too much	6.8
About right	45.9
Not enough	36.5
DK/Refused	10.7

Table 26-1

Q25. Which of the following comes closest to your opinion?
(NET DIF 1 - Percent GOP candidate minus percent never vote GOP)

	<u>Total</u>
Total	668
I would never vote for a Republican candidate for Senate.	27.9
I would consider voting for a Republican candidate for Senate if they supported lowering prescription drug prices.	57.2
DK/Refused	14.9
NET DIF 1	29.4

Table 27-1

Please tell me whether you agree or disagree with the following statements about prescription drug prices and Congress. If you don't know, just say so.

Q26. I don't support Trump but could support a Republican Senate candidate if they take action on prescription drug prices.
(NET DIF 1 - Percent agree minus percent disagree)

	<u>Total</u>
Total	668
Agree	50.3
Strongly Agree	16.5
Somewhat Agree	33.8
Disagree	33.8
Somewhat Disagree	12.0
Strongly Disagree	21.9
DK/Refused	15.9
Mean	2.5
NET DIF 1	16.5

Table 28-1

Q27. Have you or a member of your immediate family had personal experience with the high cost of prescription drugs - yes or no?

(NET DIF 1 - Percent yes minus percent no)

	<u>Total</u>
Total	1000
Yes	69.1
No	29.7
DK/Refused	1.2
NET DIF 1	39.4

Table 29-1

Q28. What is the highest level of education or training you have completed?

	<u>Total</u>
Total	1000
High school	16.6
Some high school	1.5
Graduated high school	15.1
Some college/Assoc/Trade	35.2
Some college	16.8
Two-year college degree	13.9
Trade or technical school certificate	4.4
Four-year college degree	24.1
Graduate school	22.6
Some graduate school	2.3
Graduate degree	20.4
DK/Refused	1.5

Table 30-1

Q29. What is your current household income?

	<u>Total</u>
Total	1000
<\$50,000	28.3
Under \$15,000	4.1
\$15,001 to \$25,000	5.8
\$25,001 to \$40,000	9.9
\$40,001 to \$50,000	8.4
\$50,000-\$100,000	27.2
\$50,001 to \$75,000	13.8
\$75,001 to \$100,000	13.4
Over \$100,000	26.7
DK/Refused	17.9
Mean	72650

Table 31-1

Q30. Area breaks:

	<u>Total</u>
Total	1000
Northeast	15.8
New England	4.1
Middle Atlantic	11.7
Midwest	22.8
East North Central	15.4
West North Central	7.3
South	31.8
South Atlantic	18.7
East South Central	4.7
West South Central	8.3
West	29.6
Mountain	9.5
Pacific	20.2

Table 33-1

Q32. Phone Type:

(NET DIF 1 - Percent land minus percent cell)

	Total

Total	1000
Landline	31.8
Cell Phone	68.2
NET DIF 1	-36.4

Table 34-1

Q33. General Vote History:

(NET DIF 1 - Percent 0/1/2 of 4 minus percent 3/4 of 4)

	Total

Total	1000
0/1/2 of 4	41.6
None/new reg	3.3
1 of 4	19.0
2 of 4	19.3
3/4 of 4	58.4
3 of 4	19.1
4 of 4	39.4
NET DIF 1	-16.8

Table 35-1

Q34. Primary Vote History:

(NET DIF 1 - Percent 0/1/2 of 4 minus percent 3/4 of 4)

	Total

Total	1000
0/1/2 of 4	41.6
None/new reg	3.3
1 of 4	19.0
2 of 4	19.3
3/4 of 4	58.4
3 of 4	19.1
4 of 4	39.4
NET DIF 1	-16.8