

TO: Interested Parties
FROM: Hart Research Associates
DATE: January 24, 2022
RE: New Polling Shows Voters Want Action to Address Pharmaceutical Company Pricing, Not Regulation of PBMs

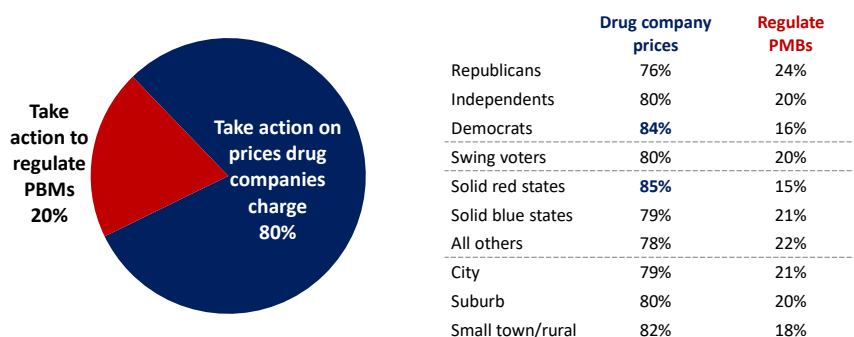
This memo summarizes key findings from an online national survey among 1,201 registered voters. The interviews were conducted from November 8 to 10, 2021. The sample is demographically and geographically representative of the electorate and is consistent with the political dispositions of registered voters.

Americans have already identified the pharmaceutical industry as the culprit in causing high drug prices, and they want Congress to rein in the predatory practices of drug manufacturers. Voters will be suspicious of policies that are intended to shift the blame from drug companies—especially if those policies are seen as weakening efforts by PBMs to negotiate lower prices or if they result in higher premiums for Medicare drug coverage or insurance coverage in the commercial market.

- 1. A large majority of voters view high prescription drug costs to be a big problem, and they single out pharmaceutical companies as the cause of the problem.**
 - 72% of voters consider the cost of prescription drugs to be a very or fairly big problem.
 - 79% of voters say that the prices drug companies are charging for prescription drugs are unreasonable.
 - 65% of voters believe that pharmaceutical companies are most responsible for the high cost of prescription drugs, compared with only 4% who point to PBMs as the primary cause of the problem.
 - Across the political spectrum, pharmaceutical companies are considered the primary culprit, with 68% of Democrats, 66% of independents, and 61% of Republicans identifying drug companies as the main cause (compared with 3%, 4%, 3% respectively who identify PBMs).

- 2. Voters express urgency around the need for Congress and the President to take action to make prescription drugs affordable for the millions of Americans who need them, and they overwhelmingly believe the focus should be reining in the skyrocketing prices drug companies are charging, not regulating PBMs.**
 - 87% of voters say it is important for Congress and the president to take action to lower the price of prescription drugs and stop excessive drug price increases, including majorities of Democrats, independents, and Republicans who say it is very important.
 - By a 60-point margin, voters want the priority for Congress to be dealing with the prices drug companies are charging (80%) as opposed to regulating PBMs (20%).

To reduce prescription drug costs, which do you think should be more important for Congress?



3. Voters across party lines support policies to address the predatory practices of pharmaceutical companies.

Greater than seven in 10 Republicans, independents, and Democrats support four proposals that have already passed the House Judiciary Committee and will curtail the greedy practices of pharmaceutical companies, should they become law. These include proposals to:

- Improve and simplify the process by which patent disputes between brand-name and generic manufacturers are resolved (94% favor);
- Limit drug companies' ability to make minor changes to brand-name drugs to extend patent protection (84% favor);
- Stop the abuse to citizen petitions by brand-name manufacturers to delay generic drugs coming to market (80% favor); and
- Prevent pay-for-delay agreements, where brand-name manufacturers pay generic drug makers to not bring the generic drugs to market (75% favor).

4. While awareness of PBMs is low, voters view PBMs in a clearly favorable light after learning more about the role they play in negotiating with pharmaceutical manufacturers to reduce drug prices.

- After being provided with a brief statement about how PBMs use the combined buying power of the organizations they work for to negotiate rebates and lower prices from drug companies, 61% of voters, including majorities across the electorate, express favorable feelings toward PBMs.
- The most important benefits of PBMs are:
 - PBMs make life-saving drugs affordable for seniors and millions of other Americans.
 - PBMs promote patient health and safety by ensuring patients can afford their medications and therefore take them as prescribed.
 - PBMs pass on to seniors 100% of the savings they negotiate for Medicare Part D and 98% of the savings to individuals in the commercial market.

5. In policy disputes pitting drug companies against PBMs, voters overwhelmingly would side with PBMs, in large part because of the important role PBMs play in countering the power and predatory behavior of big pharma.

- Three in four Republicans, independents, and Democrats say that if drug companies and PBMs were on opposite sides of an issue before Congress, they would be more likely to agree with PBMs.

