



AARP Arizona Registered Voters Survey

October 8, 2021

Sample Summary – Arizona Registered Voters

This poll was conducted as an online opt-in panel survey. The survey was commissioned by AARP of Arizona and completed by OH Predictive Insights from September 21st to September 27th, 2021, from an Arizona Statewide Registered Voter sample. The sample demographics were weighted to accurately reflect Arizona's registered voter population by gender, region, age, party, ethnicity, and educational attainment according to statistics from a voter file derived from the Arizona Secretary of State's Office as well as recent census data. The sample size was 800 registered voters in Arizona, with a MoE of $\pm 3.46\%$. Numbers may not equal 100% due to rounding.

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| Education | |
|---------------------|-----|
| High School or Less | 21% |
| Some College | 43% |
| College Graduate | 22% |
| Post-Graduate | 14% |

| Region | |
|----------|-----|
| Maricopa | 61% |
| Pima | 15% |
| Rural | 24% |

| Ethnicity Combined | |
|---------------------|-----|
| White, non-Hispanic | 65% |
| Hispanic/Latino | 22% |
| Other | 13% |

| Age | |
|-------|-----|
| 18-59 | 55% |
| 60+ | 45% |

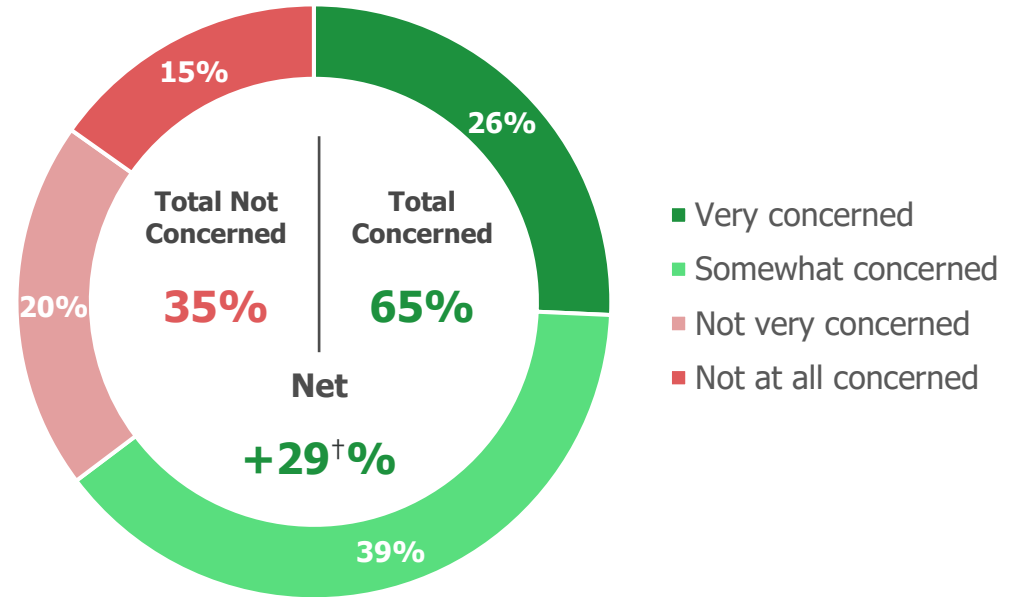
| Party Affiliation | |
|-------------------|-----|
| Democrat | 33% |
| Independent | 32% |
| Republican | 35% |

| Gender | |
|--------|-----|
| Male | 49% |
| Female | 51% |

Two thirds of voters are concerned about the cost of drugs

- Top groups driving concern
 - 18-59-year-olds (76%)
 - Female Republicans (75%)
 - Liberals (74%)
 - Hispanic/Latinos (73%)

Concern Level Regarding Cost of Drugs



Q) Thinking about the next few years, how concerned are you about being able to afford the cost of prescription medication you or a family member may need?

Subgroup: Arizona Registered Voters (n= 800)

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Definition of Policies

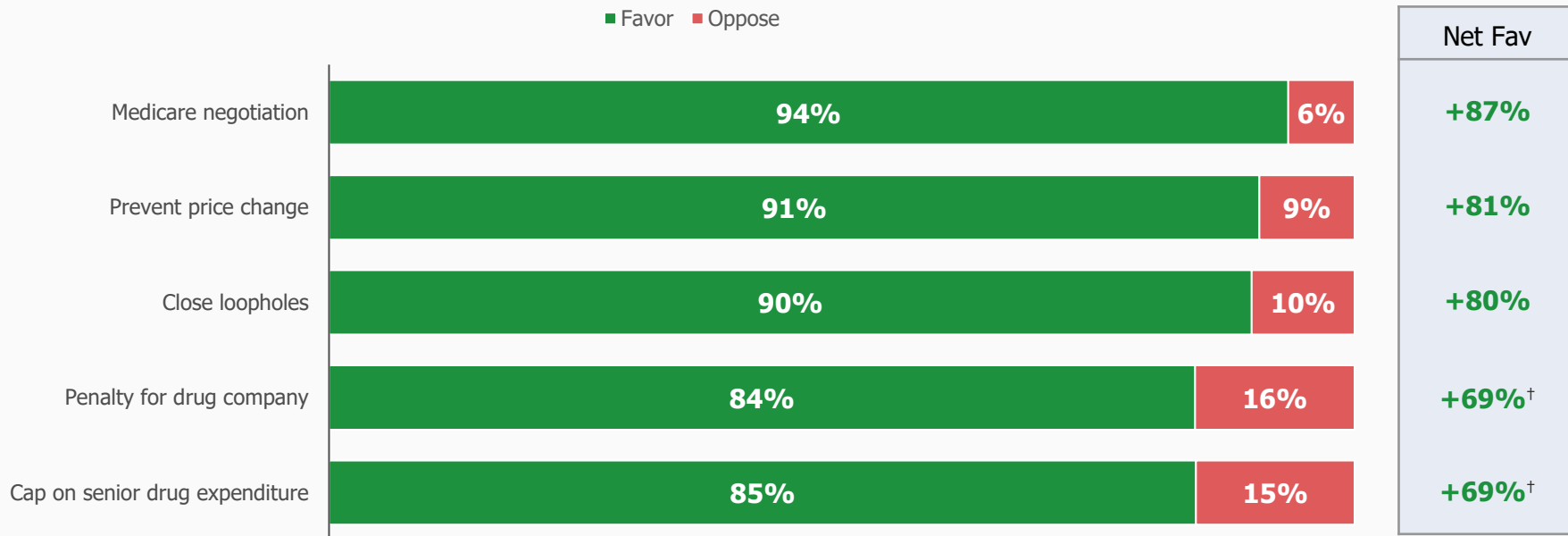
| Short Summary | Full Policy Text |
|--------------------------------|---|
| Medicare Negotiation | Allow Medicare, the largest prescription drug purchaser in the U.S., to negotiate with drug companies for lower prices |
| Cap on Senior Drug Expenditure | Put a cap on the amount seniors have to pay out of pocket every year for their prescription drugs |
| Prevent Price Change | Prevent drug companies from charging more for drugs in the United States than they do in other countries |
| Close Loopholes | Close the loopholes that allow brand-name pharmaceutical companies to charge high prices for new drugs that are simply copycats or minor improvements over existing drugs |
| Penalty for Drug Company | Penalize drug companies that raise their prices higher than inflation |

More than half of respondents support each listed measure to lower the cost of prescription medication

Opinion of Cost-Lowering Policies

(among all voters)

■ Favor ■ Oppose



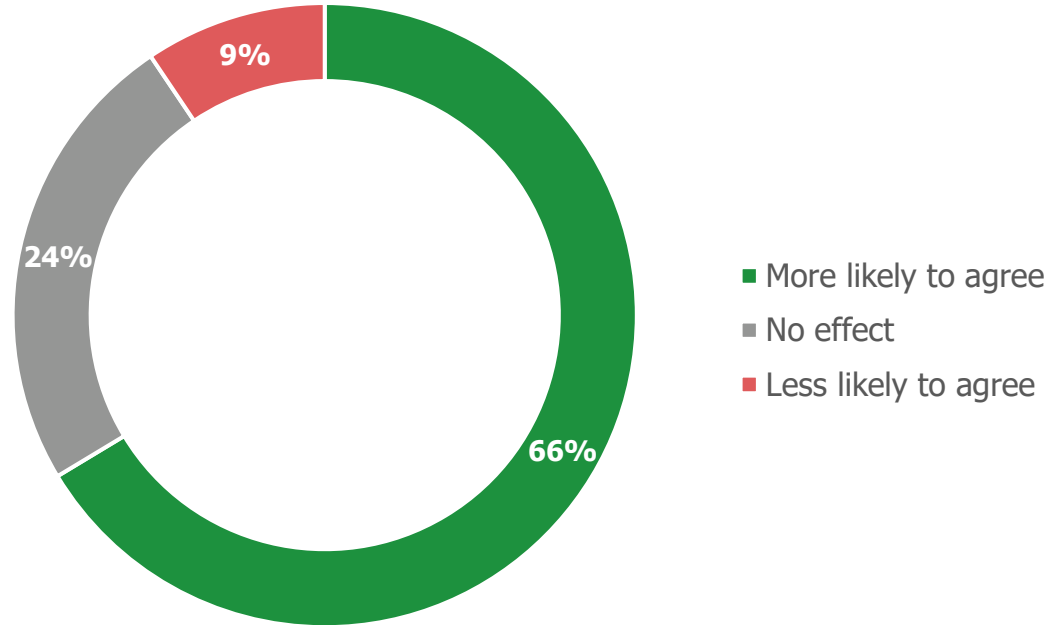
Parties cannot agree on much, but reducing drug costs is a rare opportunity for bipartisanship

| Policy | Total Favor | Republicans | Independents | Democrats |
|---------------------------------|-------------|-------------|--------------|-----------|
| Medicare Negotiation | 94% | 92% | 92% | 97% |
| Preventing Price Change | 91% | 89% | 89% | 94% |
| Closing Loopholes | 90% | 89% | 90% | 91% |
| Penalties for Drug Companies | 84% | 85% | 78% | 90% |
| Cap on Senior Drug Expenditures | 85% | 82% | 88% | 84% |

After the success of COVID-19 negotiations, more than half of voters are more likely to agree with government negotiation on drug prices

- 66% of Arizona registered voters surveyed are more likely to agree that the government should negotiate for lower drug prices for people on Medicare
- One in four (24%) think there's no effect

Impact of COVID Success on Support for Medicare Negotiation



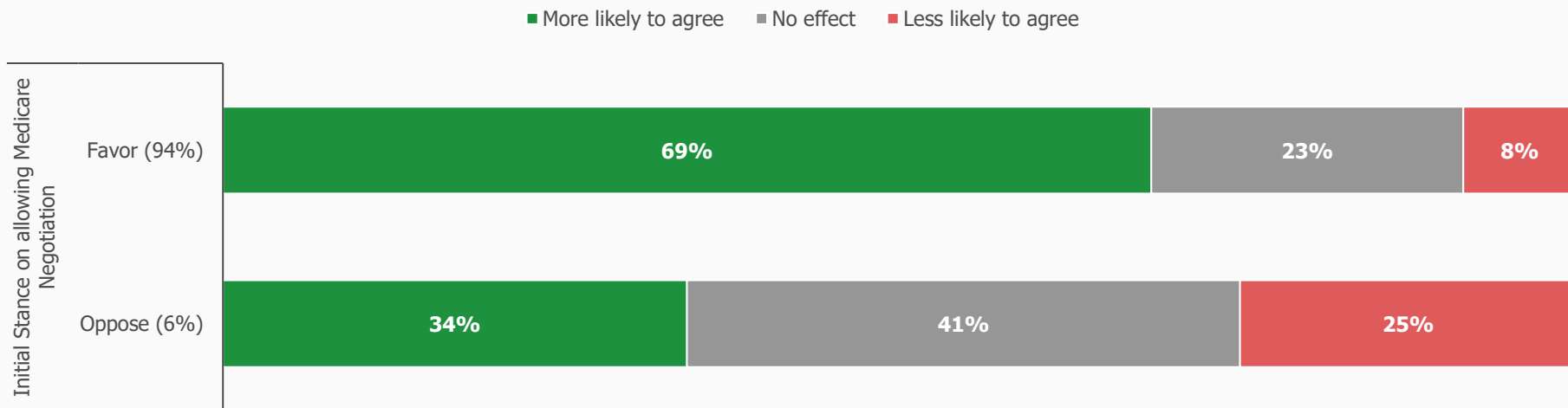
Q) The U.S. government just successfully negotiated with drug companies on the price for the COVID-19 vaccine. Does that make you more or less likely to agree that the government should negotiate for lower drug prices for people on Medicare?

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One third of those who initially opposed allowing Medicare to negotiate lower drug prices found the COVID-19 vaccines' examples persuasive

Impact of COVID Success on Support for Medicare Negotiation by Initial Stance on Negotiation



Q) Allow Medicare, the largest prescription drug purchaser in the U.S., to negotiate with drug companies for lower prices - The following are proposals that have been made to lower the prices of prescription drugs. Please indicate whether you would favor or or oppose each.

Q) The U.S. government just successfully negotiated with drug companies on the price for the COVID-19 vaccine. Does that make you more or less likely to agree that the government should negotiate for lower drug prices for people on Medicare?

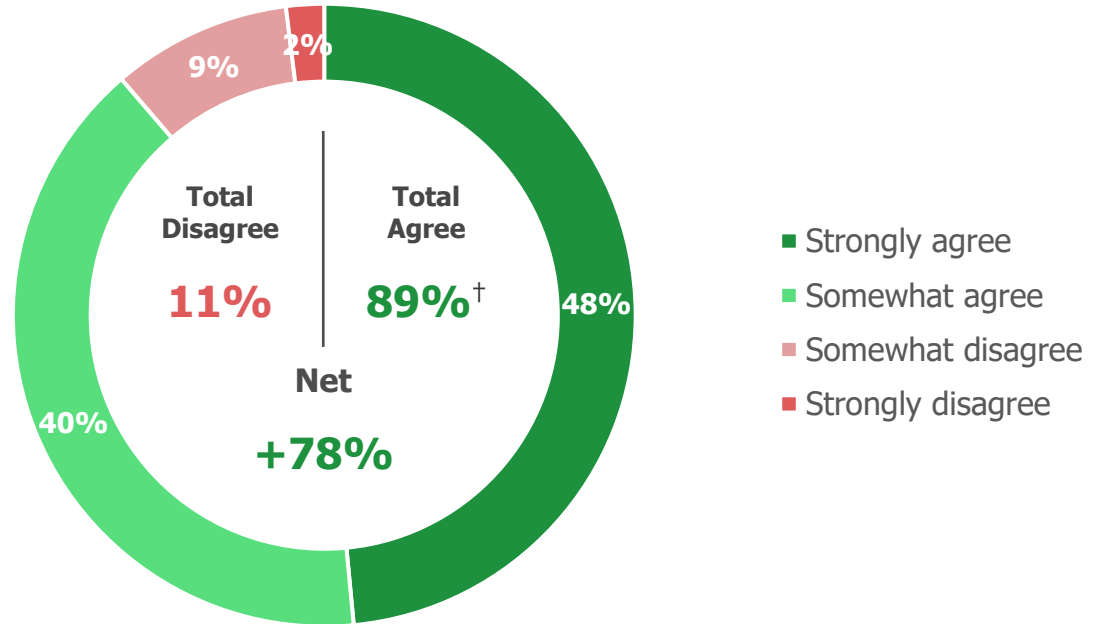
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89% of voters agree that drug prices in the US can be lowered without harming the innovation of new medicines

- Top groups driving agreement:
 - HHI \$50k or less (92%)
 - Rural (92%)
 - Female (91%)
 - 18-29 (91%)
- No group has larger than 20% disagreement

Opinion on the Possibility to Lower Medication Costs Without Harming Innovation



Q) Some people say that drug prices in the U.S., which are 3 times higher than those in other countries, can be lowered without harming innovation of new medicines. Do you agree or disagree?

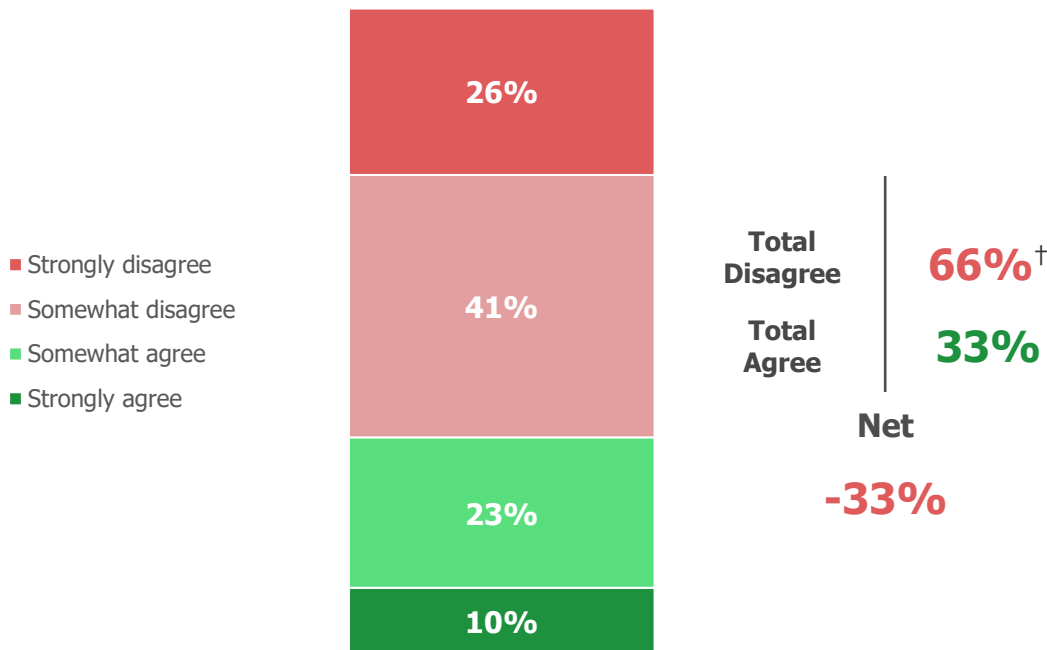
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66% of respondents disagree that innovation will suffer if allowing Medicare to negotiate for a lower price

- There are no significant HHI or educational differences between voters who agree/disagree with the statement
- Older voters surveyed are more likely to disagree than the 18-49-year-old voters surveyed
 - 73% of Seniors and 57% of 18-49-year-olds disagree

Opinion that Allowing Medicare to Negotiate Will Hurt Innovation



Q) Some people say that if Congress passes legislation to allow Medicare to negotiate for lower prices, innovation will suffer, making it harder to get lifesaving drugs to market. Do you agree or disagree?

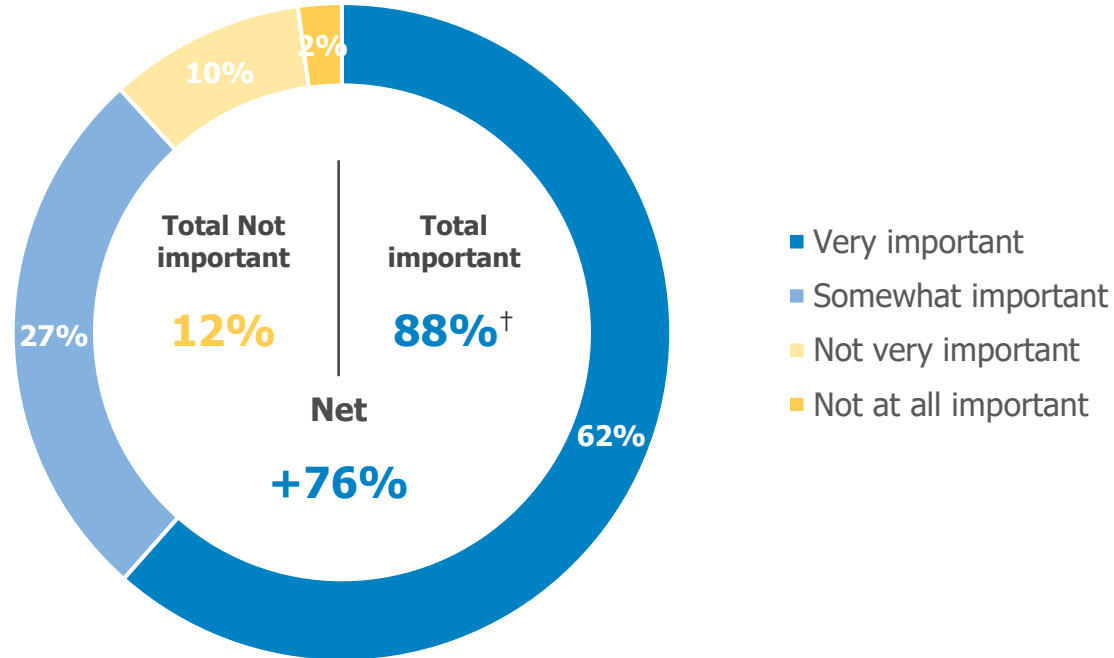
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Nearly nine in 10 voters think it is important for the government take steps to lower prescription costs this year

- Top groups driving importance
 - Liberals (96%)
 - Democrats (95%)
 - Women (92%)
 - 30–64-year-olds (92%)

Importance of Taking Governmental Action This Year



Q) How important is it for the president and Congress to agree on solutions to lower prescription drug prices this year?

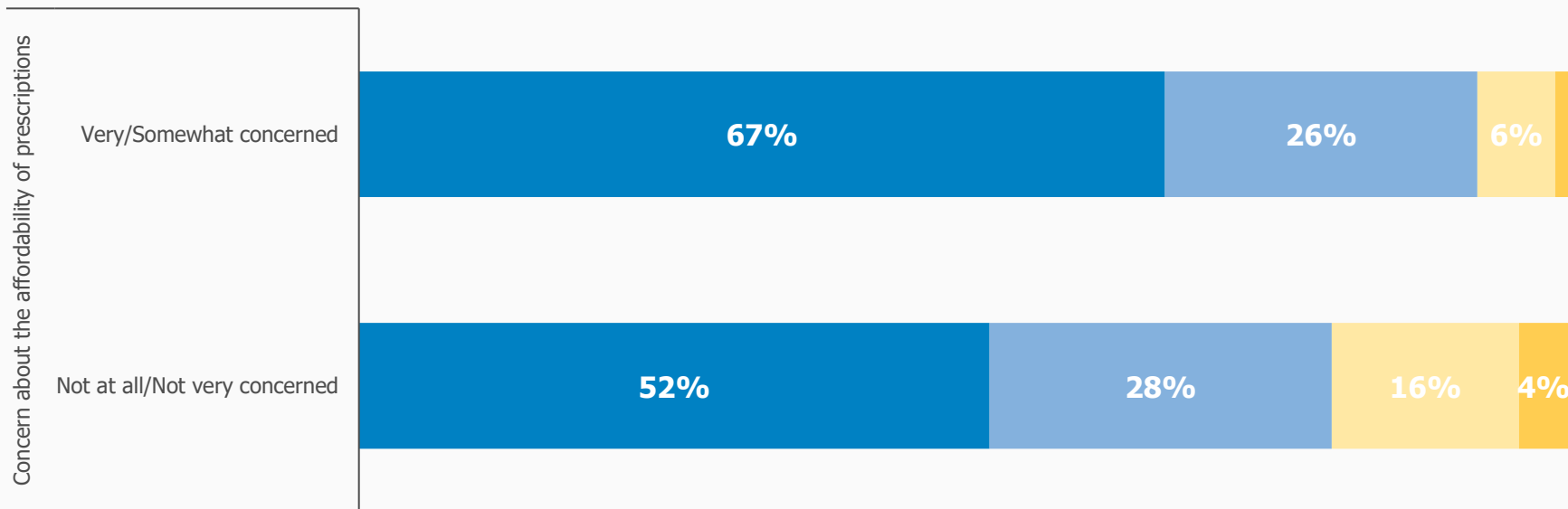
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Even voters who are not concerned about the cost of their prescriptions believe it is important for Congress and the President to act this year

Importance of Governmental Action by Concern Over Drug Affordability

■ Very important ■ Somewhat important ■ Not very important ■ Not at all important



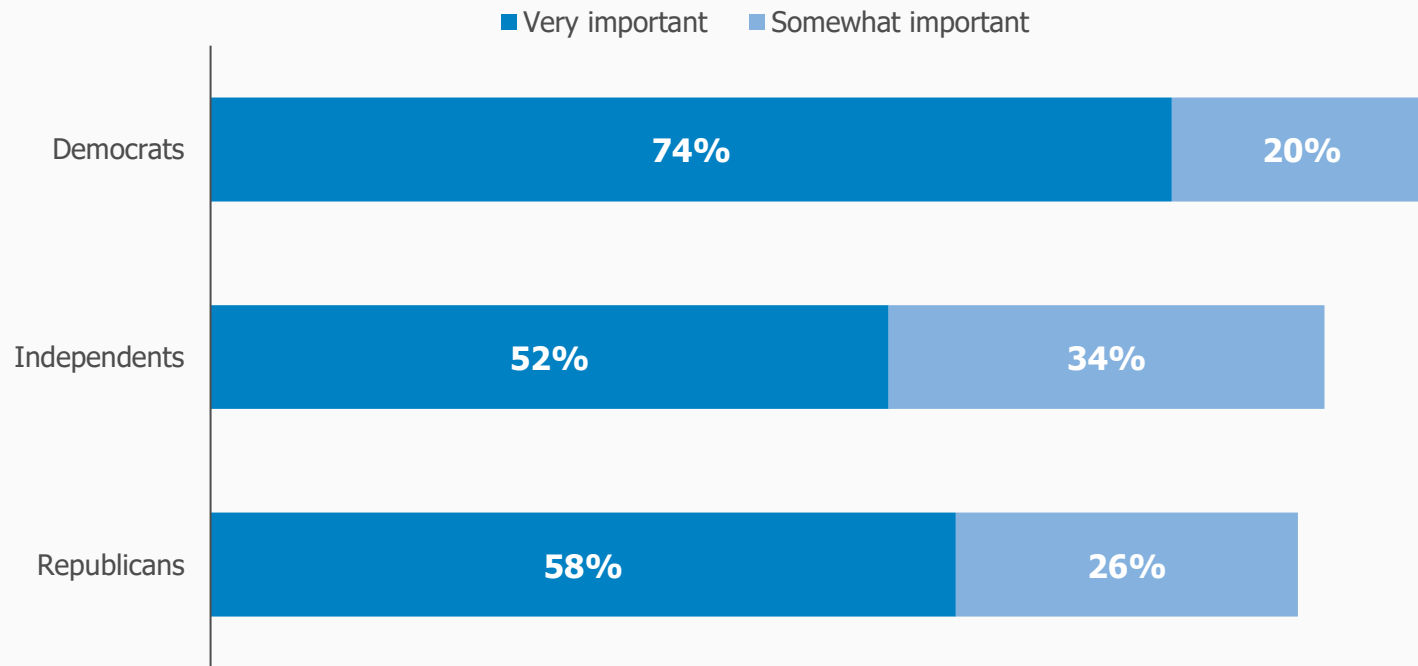
Q) How important is it for the president and Congress to agree on solutions to lower prescription drug prices this year?

Subgroup: Arizona Registered Voters (n= 800)

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Voters of all political affiliations believe in the importance for the government to take action on drug prices this year

Importance of Governmental Action by Party



Q) How important is it for the president and Congress to agree on solutions to lower prescription drug prices this year?

Subgroup: Arizona Registered Voters (n= 800)

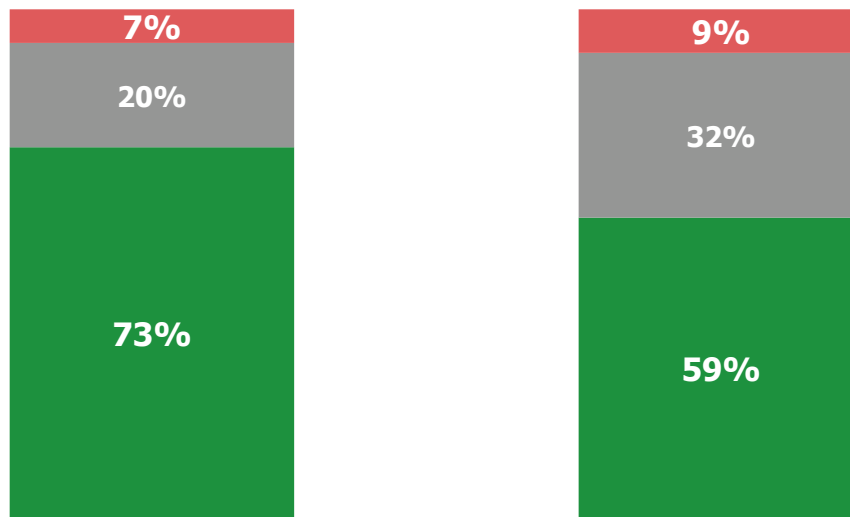
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Supporting legislation to lower prescription costs will be a benefit to politicians, regardless of voters' preferred party

Only one in 10 voters would view a member of Congress less favorably, even if that member was of a party that the voter dislikes

Opinion of a Member of Congress who Supports Cost-Lowering Legislation

More favorable No effect Less favorable



Unspecified Party

Disliked Party

Member of Congress

Q) Would you be more or less favorable to a member of Congress who supported legislation to lower prescription drug prices, or would it have no effect on your opinion?

Q) Would you be more or less likely to vote for a member of Congress who supported legislation to lower prescription drug prices even if that member of Congress was a member of a political party that you didn't like, or would it have no effect on your opinion?

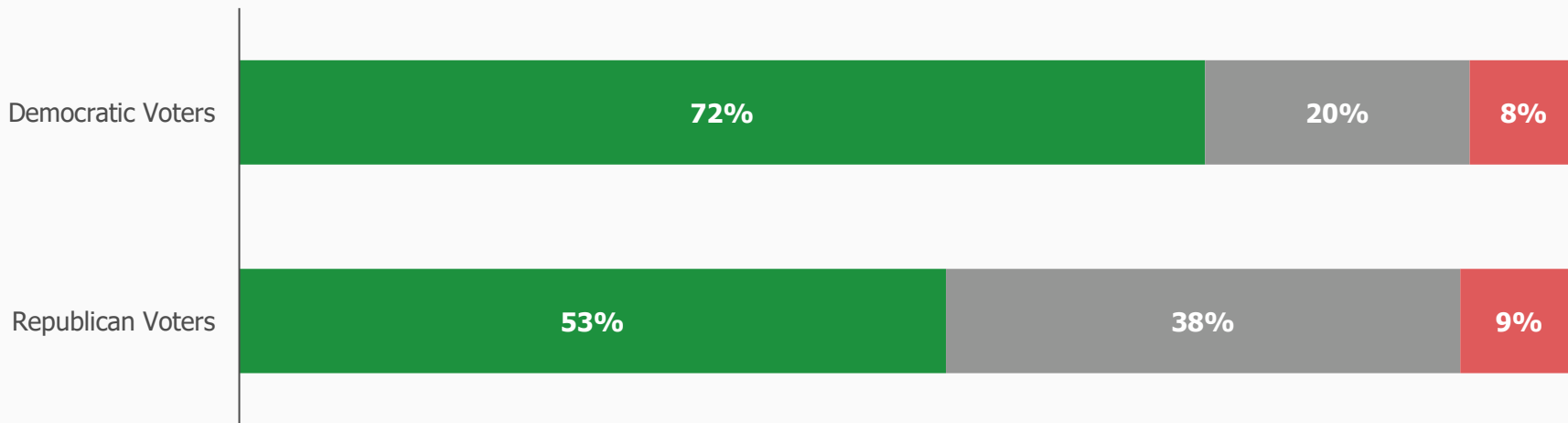
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When it comes to supporting legislation to reduce drug prices, Democratic voters are more willing to change their opinion of Republican politicians than vice versa

Opinion of a Member of Congress of a Disliked Party but Who Supports Cost-Lowering Legislation

■ More favorable ■ No effect ■ Less favorable



Q) Would you be more or less favorable to a member of Congress who supported legislation to lower prescription drug prices, or would it have no effect on your opinion?

Q) Would you be more or less likely to vote for a member of Congress who supported legislation to lower prescription drug prices even if that member of Congress was a member of a political party that you didn't like, or would it have no effect on your opinion?

Subgroup: Arizona Registered Democratic Voters (n= 264), Arizona Registered Republican Voters (n= 280)

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Thank You

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