

healthy
women

HEALTHCARE, MANUFACTURING, & TRADE RESEARCH REVIEW



THE CAMPBELL SPENCER GROUP

ALG|research

McLaughlin & Associates

Paid for by Pfizer

INTRODUCTION

The **Campbell Spencer Group** and the bi-partisan polling team of **John Anzalone** and **John McLaughlin** have conducted research to explore important themes in **healthcare, manufacturing and trade**. It was paid for by Pfizer and Healthy Women is pleased to be able to share these results with you.

The **national online survey** was conducted of 1000 likely voters between April 17th and April 22nd, 2018. The margin of error is + / - 3.1%.

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RESEARCH TEAM

RESEARCH TEAM

CAMPBELL SPENCER

Founder and President



THE CAMPBELL SPENCER GROUP

Campbell Spencer is a nationally known public affairs strategist with 20 years of experience in navigating the complex intersection of policy, business, and politics.

She is a veteran of national politics, having served on three presidential campaigns, advised on numerous House and Senate races, worked for the Democratic National Committee, and served as the White House Midwest Political Director under President Obama. Spencer offers extensive expertise in developing and managing research and issue campaigns.

Prior to founding The Campbell Spencer Group, Spencer served at one of the nation's largest public affairs firms developing strategy and managing bi-partisan public affairs campaigns for Fortune 15 companies.

JOHN STINEMAN

Principal



John Stineman has been a national public affairs and marketing consultant for over seventeen years and has worked in the public affairs/political sector for over 24 years. Stineman specializes in strategy and messaging, market segmentation, business development initiatives as well as public affairs/issue management. Over the course of his consulting career, Stineman has been privileged to work for more than a quarter of the Fortune 50 and several leading advocacy groups and trade associations.

John's political analysis is cited frequently by the media, particularly in presidential nominating contests.

Prior to his consulting career, Stineman worked in Republican campaigns, including managing the Iowa Caucus campaign for Steve Forbes in 2000.

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THE CAMPBELL SPENCER GROUP

RESEARCH TEAM

JOHN ANZALONE

Founder

ALGIresearch

John Anzalone has over twenty-five years of polling experience helping candidates, associations, and corporations with message development and strategic planning. John has built a firm that helped elect President Barack Obama twice, U.S. Senators and dozens of Congressmen, as well as big city Mayors all over the country.

Before concentrating his energies on polling for campaigns, Anzalone managed gubernatorial, congressional, and mayoral races in five states. His experiences include working with national Democratic strategists James Carville and Paul Begala on U.S. Senator Frank Lautenberg's (NJ) 1988 campaign.

John grew up in St. Joseph, Michigan and graduated from Kalamazoo College in Kalamazoo, MI. John is married and has four children.

JOHN MCLAUGHLIN

CEO & Founder

McLaughlin & Associates

John has been a strategic consultant and pollster for over 30 years. He served as a pollster for President Trump's campaign.

John's previous political clients include former Presidential candidates Steve Forbes and Fred Thompson, former California Governor Arnold Schwarzenegger, former Florida Governor Jeb Bush, and 22 current and former U.S. Senators and 20 current Republican members of Congress. He is a founding partner of Opiniones Latinas, a company dedicated to researching opinions of Latinos nationwide and his work has won both Telly and PR Week Campaign Awards.

Education: BA, Fordham College, MBA, Fordham

HEALTHCARE RESEARCH REVIEW

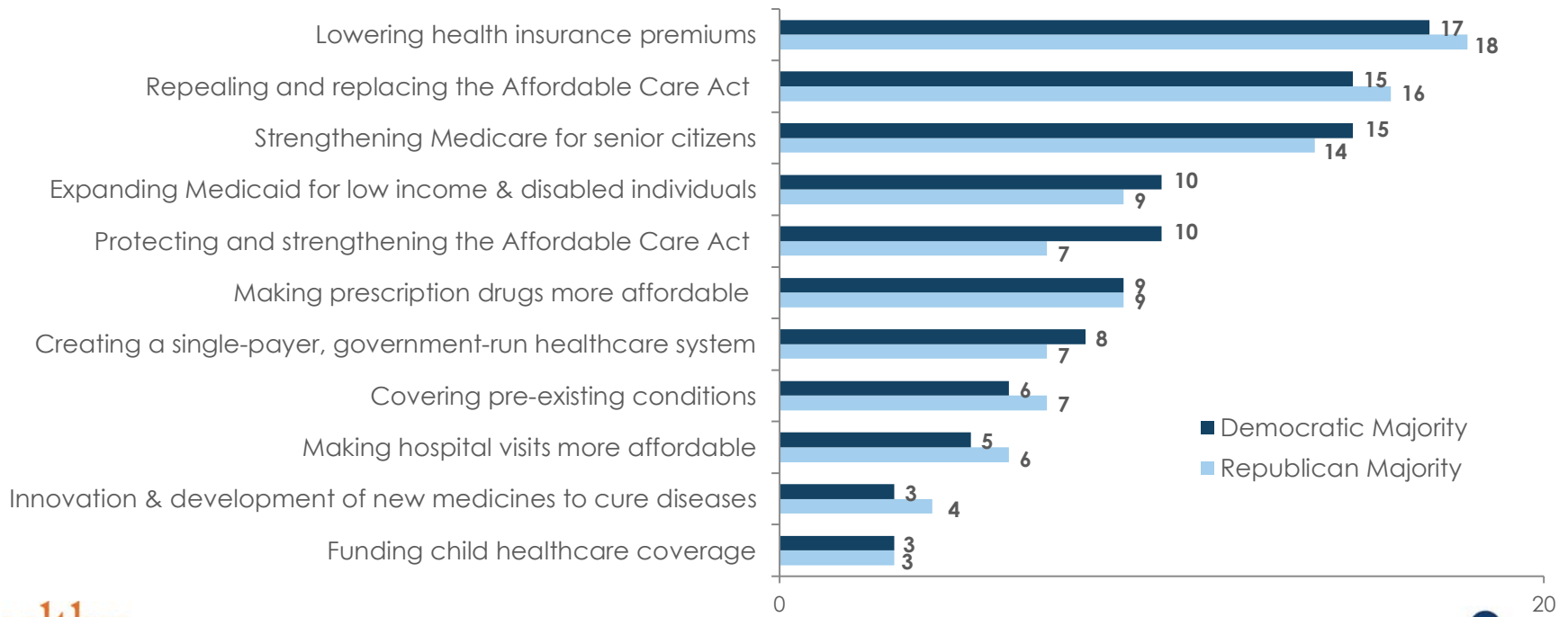
MAJOR FINDINGS



Voters expressed a broad range of priorities for healthcare.

Regardless which party holds control of Congress after the upcoming election, **lowering health insurance premiums emerged as the top priority** followed by repealing the ACA and strengthening Medicare.

MOST IMPORTANT HEALTH CARE ISSUE

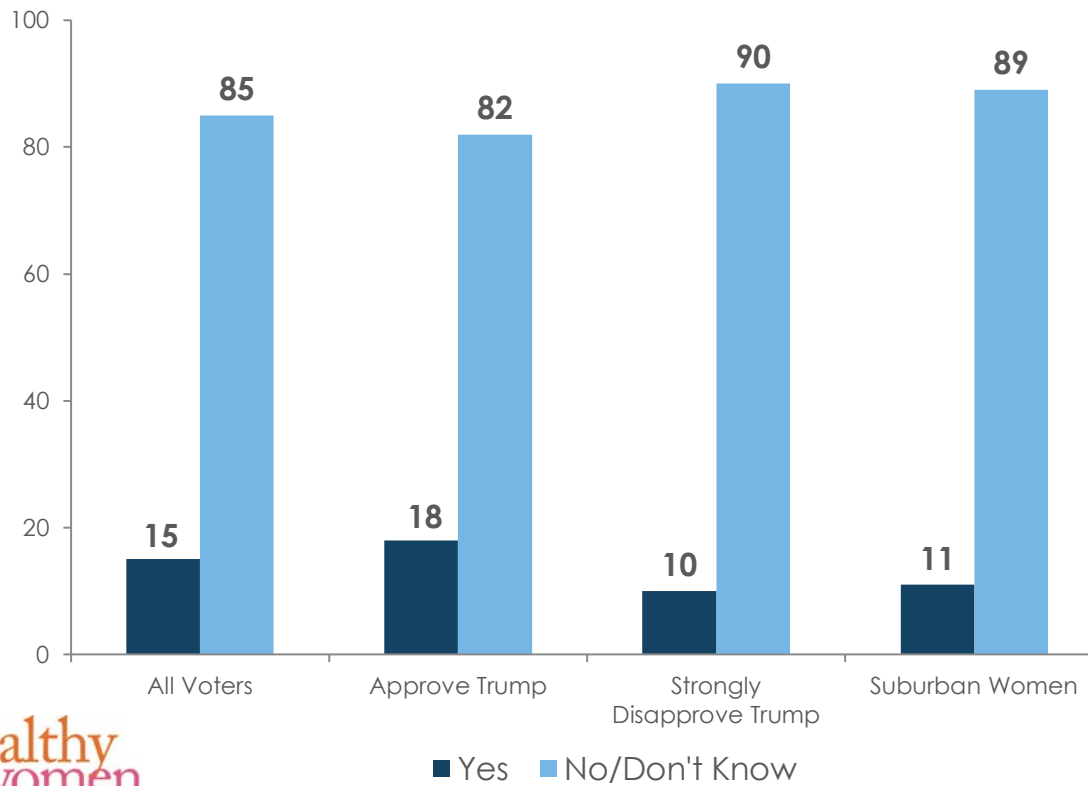


MAJOR FINDINGS



85% of voters have never heard of a PBM or Pharmacy Benefit Manager.

HAVE YOU EVER HEARD OF A PBM OR PHARMACY BENEFIT MANAGEMENT COMPANY?



	YES	NO/D.K.
Approve Trump	18	82
Disapprove Trump	13	87
Republican	18	82
Democratic	15	85
Independent	11	89
Less Than College	10	90
College Graduate	20	80
Under \$60K	10	90
Over \$60K	22	78
White	14	86
African-American	10	90
Hispanic	23	77
Under 55	18	82
Over 55	10	90
Men	19	81
Women	11	89
White Coll. Edu. Sub.	18	82
White Coll. Edu. Sub. Men	23	77
White Coll. Edu. Sub. Women	11	89

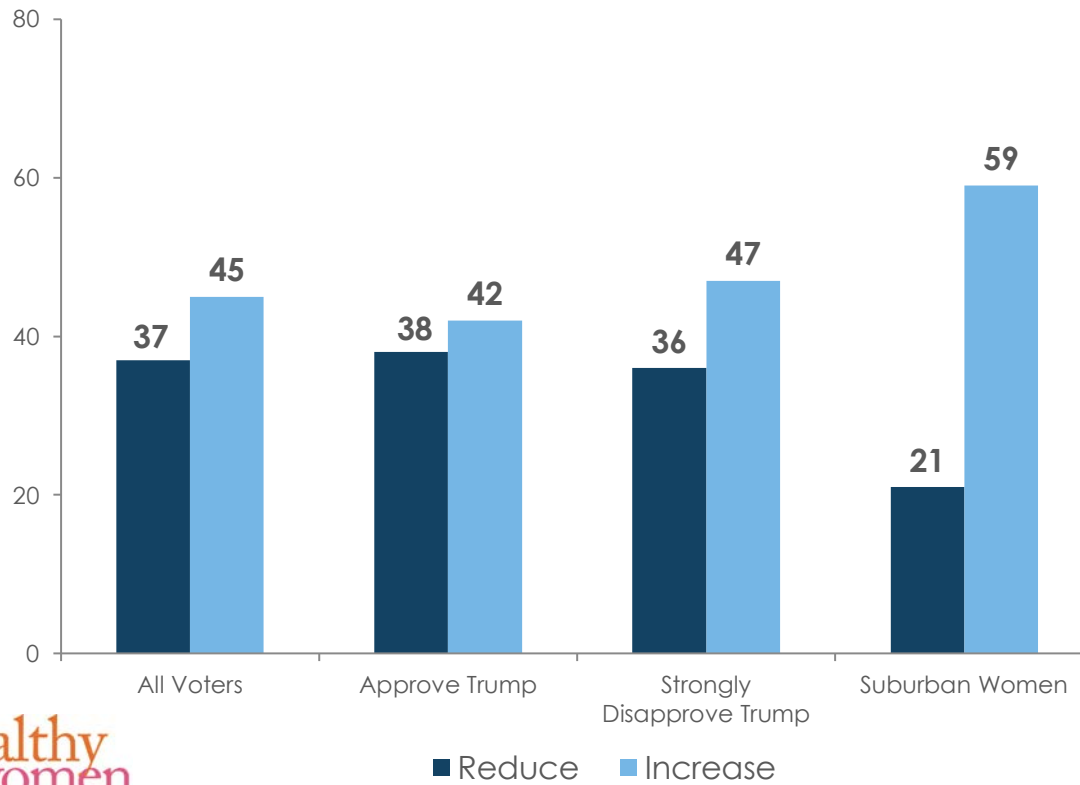
MAJOR FINDINGS



45%

Following a description of PBM's, **45% of all voters believe PBM's increase costs while 37% believe they reduce costs.**

A PHARMACY BENEFIT MANAGEMENT COMPANY IS A THIRD-PARTY ADMINISTRATOR OF PRESCRIPTION DRUG PROGRAMS FOR PRIVATE AND GOVERNMENT HEALTHCARE PLANS THAT ACTS AS A MIDDLEMAN AND DETERMINE HOW MUCH CONSUMERS PAY FOR THEIR MEDICINES. **KNOWING THAT, DO YOU THINK PHARMACY BENEFIT MANAGERS REDUCE OR INCREASE THE COST CONSUMERS PAY FOR PRESCRIPTION DRUGS?**



	Reduce	Increase
Approve Trump	38	42
Disapprove Trump	36	48
Republican	40	40
Democratic	40	45
Independent	29	51
Less Than College	37	43
College Graduate	36	48
Under \$60K	35	44
Over \$60K	40	47
White	34	45
African-American	40	47
Hispanic	46	43
Under 55	41	43
Over 55	31	48
Men	40	41
Women	33	48
White Coll. Edu. Sub.	26	53
White Coll. Edu. Sub. Men	30	49
White Coll. Edu. Sub. Women	21	59



MAJOR FINDINGS

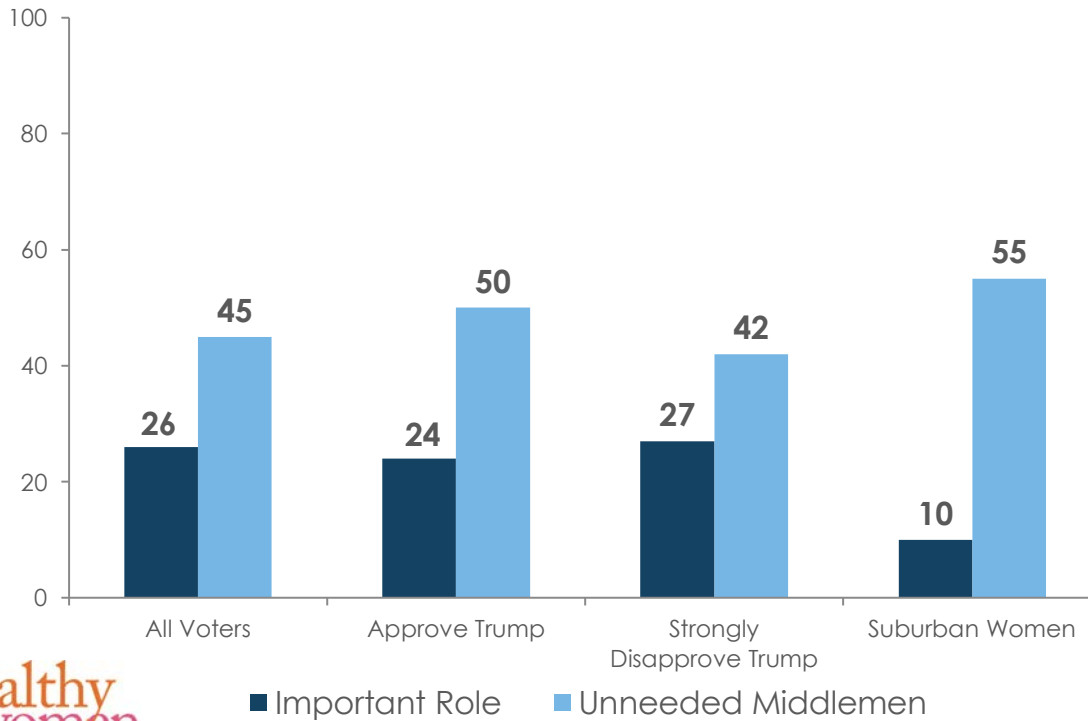


45%

When asked if PBMs play an important role or if they are unneeded middleman, **45%** of all voters see PBM's as unneeded middlemen.

WHICH STATEMENT DO YOU AGREE WITH MORE?

- 1. PHARMACY BENEFIT MANAGEMENT COMPANIES SERVE AN IMPORTANT ROLE IN KEEPING THE COST OF PRESCRIPTION DRUGS LOW FOR CONSUMERS.**
- 2. PHARMACY BENEFIT MANAGEMENT COMPANIES ARE UNNEEDED MIDDLEMEN THAT ADD TO THE COSTS CONSUMERS PAY FOR THEIR PRESCRIPTION MEDICINES AND CARE MORE ABOUT THEIR OWN PROFITS THAN SAVING CONSUMERS MONEY.**



	Important	Unneeded
Approve Trump	24	50
Disapprove Trump	27	43
Republican	24	49
Democratic	29	41
Independent	25	45
Less Than College	28	41
College Graduate	23	50
Under \$60K	26	43
Over \$60K	26	48
White	23	47
African-American	33	40
Hispanic	32	45
Under 55	31	44
Over 55	19	47
Men	28	47
Women	24	44
White Coll. Edu. Sub.	15	52
White Coll. Edu. Sub. Men	20	48
White Coll. Edu. Sub. Women	10	55



■ Important Role ■ Unneeded Middlemen

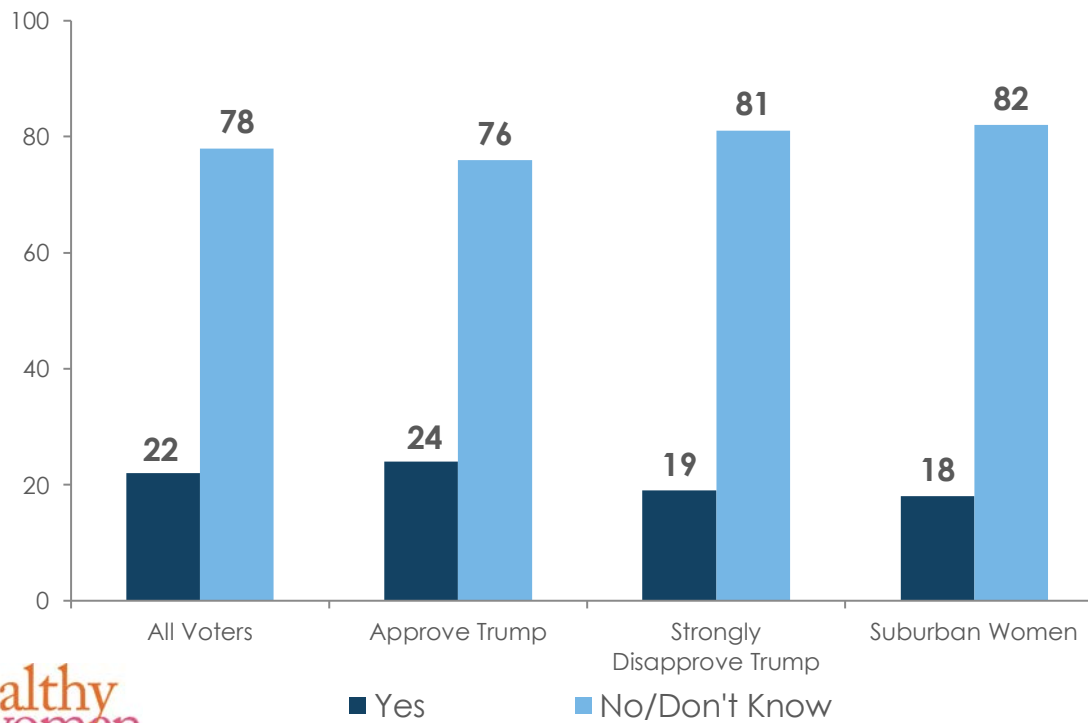
MAJOR FINDINGS



78%

of voters **did not know that PBMs often set co-pays higher than what consumers could pay directly.**

DID YOU KNOW PHARMACY BENEFIT MANAGERS OFTEN SET CO-PAYS FOR PRESCRIPTION MEDICINE HIGHER THAN WHAT CONSUMERS COULD PAY BY NOT USING THEIR INSURANCE?



	YES	NO/D.K.
Approve Trump	24	76
Disapprove Trump	20	80
Republican	27	73
Democratic	22	78
Independent	15	85
Less Than College	19	81
College Graduate	24	76
Under \$60K	19	81
Over \$60K	27	73
White	21	79
African-American	14	86
Hispanic	31	69
Under 55	25	75
Over 55	17	83
Men	26	74
Women	18	82
White Coll. Edu. Sub.	19	81
White Coll. Edu. Sub. Men	20	80
White Coll. Edu. Sub. Women	18	82

U.S. BASED MANUFACTURING RESEARCH REVIEW

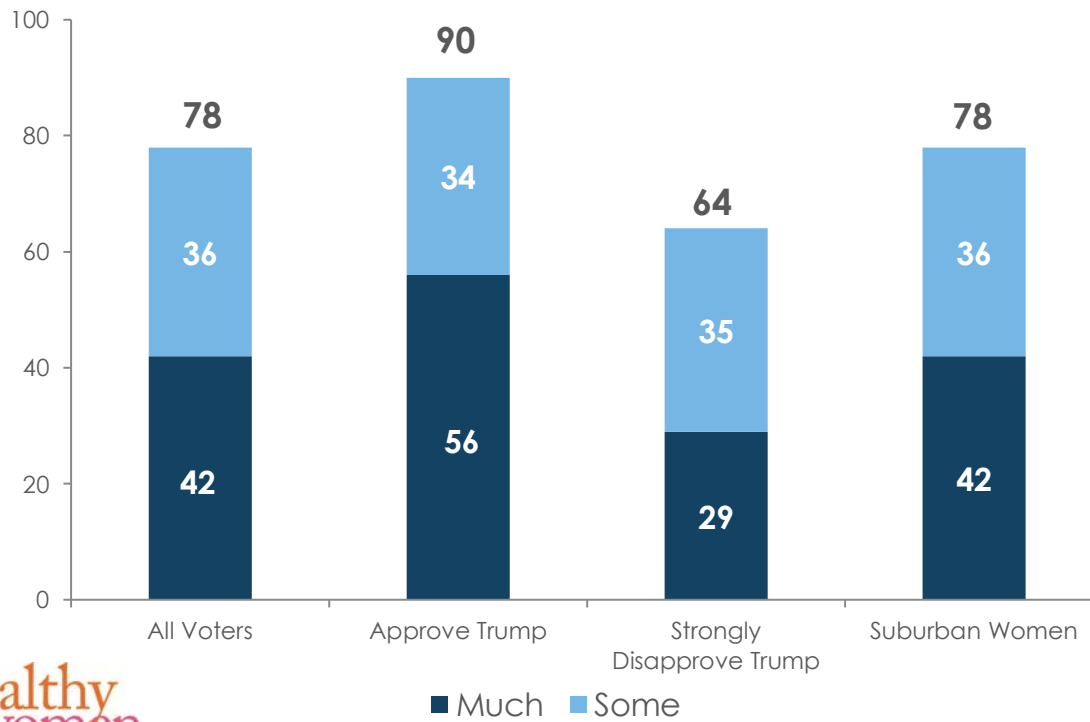
MAJOR FINDINGS



78%

An overwhelming majority of voters (**78%**) are more likely to trust the quality of products manufactured in the U.S.

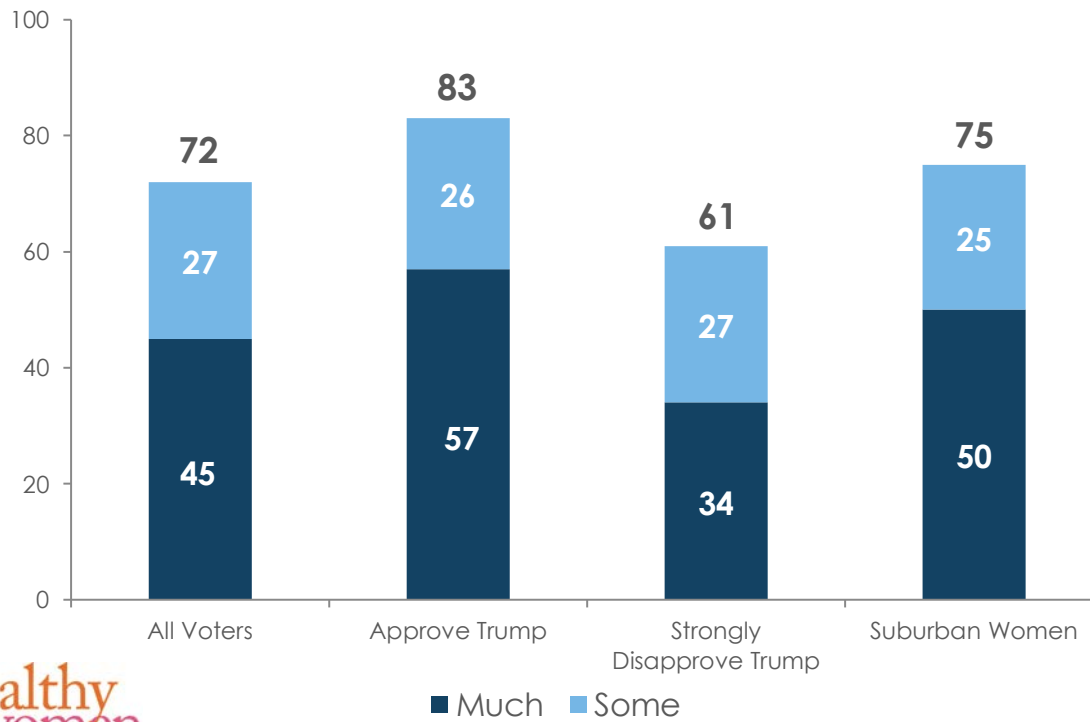
AS A CONSUMER, ARE YOU MORE LIKELY OR LESS LIKELY TO **TRUST THE QUALITY OF PRODUCTS MANUFACTURED IN THE UNITED STATES BY AN AMERICAN COMPANY?**



	MORE	Much	LESS
Approve Trump	90	56	4
Disapprove Trump	68	30	10
Republican	88	53	5
Democratic	72	37	9
Independent	74	35	6
Less Than College	78	44	8
College Graduate	79	39	5
Under \$60K	77	42	7
Over \$60K	81	41	7
White	83	44	3
African-American	66	36	14
Hispanic	69	37	16
Under 55	72	40	9
Over 55	86	45	4
Men	80	42	7
Women	76	42	7
White Coll. Edu. Sub.	80	34	4
White Coll. Edu. Sub. Men	81	27	3
White Coll. Edu. Sub. Women	78	42	6



ARE YOU MORE LIKELY OR LESS LIKELY TO TRUST THE **QUALITY OF MEDICINES MADE IN THE UNITED STATES BY AN AMERICAN BASED PHARMACEUTICAL MANUFACTURER** COMPARED TO MEDICINES MADE IN OTHER COUNTRIES?



	MORE	Much	LESS
Approve Trump	83	57	6
Disapprove Trump	64	35	15
Republican	86	57	6
Democratic	70	41	14
Independent	61	38	12
Less Than College	73	45	10
College Graduate	73	46	11
Under \$60K	70	43	11
Over \$60K	77	50	10
White	75	48	9
African-American	62	39	20
Hispanic	69	39	15
Under 55	67	40	13
Over 55	80	53	7
Men	73	46	11
Women	73	45	11
White Coll. Edu. Sub.	73	47	9
White Coll. Edu. Sub. Men	71	45	10
White Coll. Edu. Sub. Women	75	50	7



TRADE RESEARCH REVIEW

MAJOR FINDINGS



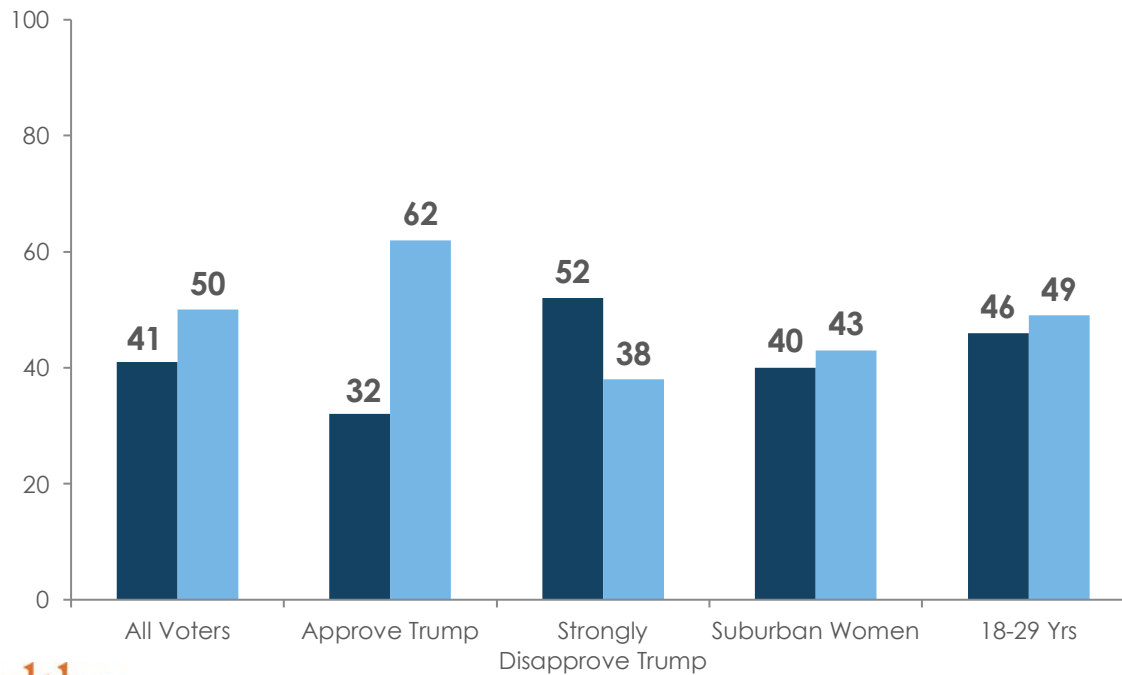
When it comes to trade, voters are fairly evenly split:

50% of voters prioritize protecting American companies and workers from unfair deals

41% focus on free trade principles

WHEN THINKING OF INTERNATIONAL TRADE, WHAT DO YOU CONSIDER TO BE MORE IMPORTANT?

- 1. SECURING FOREIGN MARKETS FOR AMERICAN MADE GOODS TO HELP THE UNITED STATES ECONOMY AND CREATE JOBS.**
- 2. PROTECTING AMERICAN COMPANIES AND WORKERS IN THE UNITED STATES FROM UNFAIR FOREIGN DEALS**



	Foreign Markets	Unfair Deals
Approve Trump	32	62
Disapprove Trump	50	39
Republican	30	64
Democratic	51	40
Independent	42	47
Less Than College	39	53
College Graduate	45	46
Under \$60K	41	50
Over \$60K	43	50
White	41	52
African-American	50	39
Hispanic	37	52
Under 55	43	47
Over 55	39	54
Men	42	52
Women	41	48
White Coll. Edu. Sub.	44	44
White Coll. Edu. Sub. Men	47	45
White Coll. Edu. Sub. Women	40	43



■ Secure Foreign Markets ■ Protect Against Unfair Deals

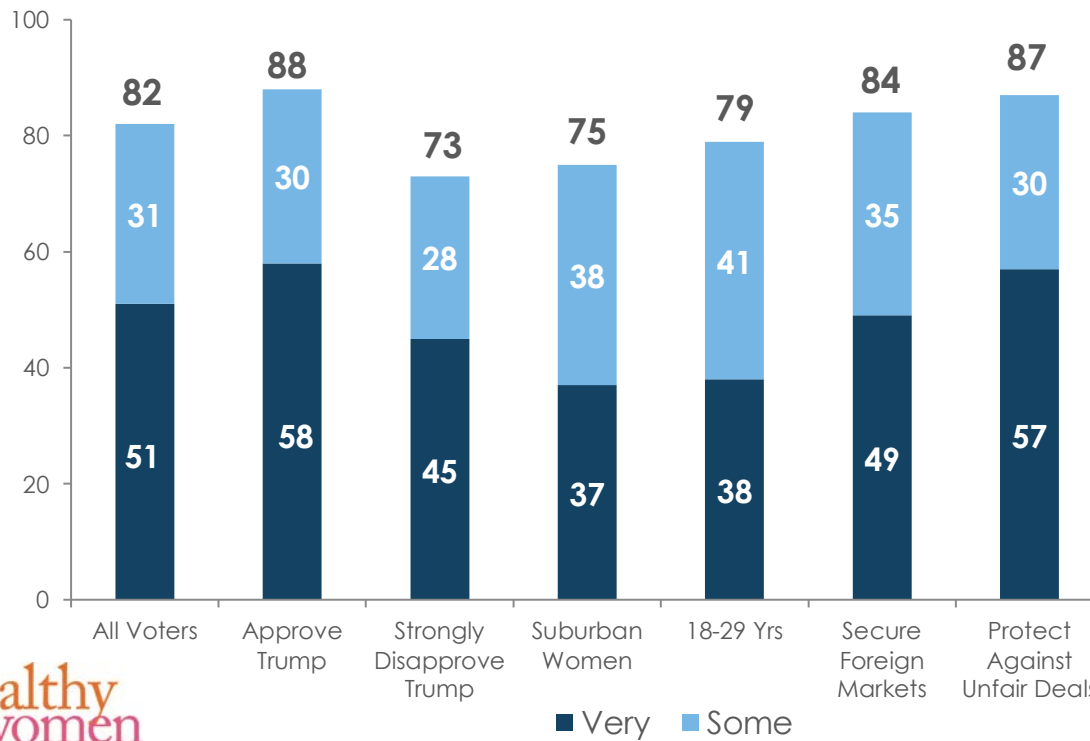
MAJOR FINDINGS



Strong majorities of **voters believe it is important to protect U.S. pharmaceutical companies' intellectual property in trade negotiations.**

84% Notably, **84% of those who prioritize free trade principles** support such protections in international trade agreements.

HOW IMPORTANT IS IT TO PROTECT UNITED STATES PHARMA-CEUTICAL MANUFACTURERS IN INTERNATIONAL TRADE AGREEMENTS FROM FOREIGN COUNTRIES STEALING THEIR INTELLECTUAL PROPERTY AND TRADE SECRETS OR PRODUCING COUNTERFEIT PRESCRIPTION DRUGS?



	Important	Very	NOT
Approve Trump	88	58	6
Disapprove Trump	76	45	13
Republican	89	58	5
Democratic	79	51	11
Independent	78	43	13
Less Than College	82	53	8
College Graduate	81	48	11
Under \$60K	79	50	10
Over \$60K	86	52	9
White	82	49	9
African-American	86	60	5
Hispanic	76	53	15
Under 55	81	47	10
Over 55	83	56	9
Men	83	52	11
Women	81	50	9
White Coll. Edu. Sub.	79	38	13
White Coll. Edu. Sub. Men	82	39	16
White Coll. Edu. Sub. Women	75	37	10



CONCLUSION