



CYGNAL

Survey of Likely Right-Leaning General Election Voters

National

Conducted June 5 – 8, 2023

n=1000 | $\pm 3.02\%$

Industry Screener

1. Do you, or does anyone in your immediate family, work in any of the following industries or jobs? Select all that apply.

	Freq.	%
Advertising or public relations	0	0.0%
Market or public opinion research	0	0.0%
A state or federal government agency	104	10.4%
None of the above	896	89.6%
Unsure	0	0.0%
Total	1000	100.0%

Vote Frequency

2. When there is an election for governor in your state, how often do you vote in the election?

	Freq.	%
Always vote	736	73.6%
Almost always vote	143	14.3%
Vote most of the time	58	5.8%
Sometimes vote	40	4.0%
Hardly ever vote	10	1.0%
Never vote	10	1.0%
Unsure	4	0.4%
Total	1000	100.0%

3 – 9. Please indicate whether you have a favorable or unfavorable impression of each one using a zero-to-ten scale, where a ten means you have an extremely favorable impression of that company and a zero means you have an extremely unfavorable impression of that company. You can use any number from zero to ten; the higher the number, the more favorable you feel toward that company. If you've never heard of, or aren't familiar with the company, choose so.

3. Pfizer

	Freq.	%
0	91	9.1%
1	240	24.0%
2	72	7.2%
3	51	5.1%
4	54	5.4%
5	125	12.5%
6	66	6.6%
7	73	7.3%
8	52	5.2%
9	44	4.4%
10	44	4.4%
Never heard of	90	9.0%



Total	1000	100.0%
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4. Patagonia

	Freq.	%
0	109	10.9%
1	94	9.4%
2	41	4.1%
3	28	2.8%
4	29	2.9%
5	88	8.8%
6	46	4.6%
7	56	5.6%
8	34	3.4%
9	31	3.1%
10	45	4.5%
Never heard of	399	39.9%
Total	1000	100.0%

5. General Electric

	Freq.	%
0	21	2.1%
1	50	5.0%
2	36	3.6%
3	44	4.4%
4	70	7.0%
5	181	18.1%
6	131	13.1%
7	113	11.3%
8	114	11.4%
9	70	7.0%
10	81	8.1%
Never heard of	89	8.9%
Total	1000	100.0%

6. Apple

	Freq.	%
0	31	3.1%
1	76	7.6%
2	55	5.5%
3	73	7.3%
4	57	5.7%
5	136	13.6%
6	97	9.7%
7	117	11.7%
8	111	11.1%
9	80	8.0%



10	108	10.8%
Never heard of	60	6.0%
Total	1000	100.0%

7. ExxonMobil

	Freq.	%
0	43	4.3%
1	80	8.0%
2	55	5.5%
3	53	5.3%
4	74	7.4%
5	175	17.5%
6	100	10.0%
7	129	12.9%
8	65	6.5%
9	56	5.6%
10	72	7.2%
Never heard of	97	9.7%
Total	1000	100.0%

8. Moderna

	Freq.	%
0	87	8.7%
1	237	23.7%
2	84	8.4%
3	44	4.4%
4	46	4.6%
5	122	12.2%
6	64	6.4%
7	64	6.4%
8	49	4.9%
9	29	2.9%
10	39	3.9%
Never heard of	136	13.6%
Total	1000	100.0%

9. Johnson & Johnson

	Freq.	%
0	49	4.9%
1	158	15.8%
2	69	6.9%
3	64	6.4%
4	63	6.3%
5	148	14.8%
6	93	9.3%
7	95	9.5%



8	79	7.9%
9	46	4.6%
10	66	6.6%
Never heard of	70	7.0%
Total	1000	100.0%

Thinking about healthcare, medications, and prescription drugs...

Cost of Drugs Initial

10. In general, do you think the cost of prescription drugs is reasonable or unreasonable?

	Freq.	%
Reasonable	110	11.0%
Unreasonable	833	83.3%
Unsure	57	5.7%
Total	1000	100.0%

Drug Company Prices Initial

11. Which of the following do you agree with more?

	Freq.	%
Drug companies need to charge high prices in order to fund the innovative research necessary for developing new drugs	71	7.1%
Even if U.S. prices were lower, drug companies would still make enough money to invest in research needed to develop new drugs	855	85.5%
Unsure	74	7.4%
Total	1000	100.0%

Understand Cost Initial

12. Do you agree or disagree with the following statement? While I am not happy about the fact that prescription drug prices are high, I understand why they cost what they do.

	Freq.	%
Agree	236	23.6%
Strongly agree	44	4.4%
Somewhat agree	192	19.2%
Neither agree nor disagree	102	10.2%
Disagree	636	63.6%
Somewhat disagree	240	24.0%
Strongly disagree	396	39.6%
Unsure	26	2.6%
Total	1000	100.0%



Prices too High Initial

13. Do you agree or disagree with the following statement? Prescription drug prices are too high, and we should do anything we can, including implementing government price controls, to make them less expensive.

	Freq.	%
<u>Agree</u>	<u>543</u>	<u>54.3%</u>
Strongly agree	279	27.9%
Somewhat agree	263	26.3%
<u>Neither agree nor disagree</u>	<u>110</u>	<u>11.0%</u>
<u>Disagree</u>	<u>318</u>	<u>31.8%</u>
Somewhat disagree	147	14.7%
Strongly disagree	171	17.1%
Unsure	28	2.8%
Total	1000	100.0%

Age of Discovery Initial

14. Do you agree or disagree with the following statement? We are currently in an age of unprecedented medical discovery with new drug discoveries occurring at a pace far beyond anything the industry has ever experienced.

	Freq.	%
<u>Agree</u>	<u>510</u>	<u>51.0%</u>
Strongly agree	156	15.6%
Somewhat agree	354	35.4%
<u>Neither agree nor disagree</u>	<u>236</u>	<u>23.6%</u>
<u>Disagree</u>	<u>194</u>	<u>19.4%</u>
Somewhat disagree	121	12.1%
Strongly disagree	73	7.3%
Unsure	60	6.0%
Total	1000	100.0%

More Drug and Treatment Options Initial

15. Do you agree or disagree with the following statement? More new drugs and treatment options are being discovered now than at any time in the history of medicine.

	Freq.	%
<u>Agree</u>	<u>560</u>	<u>56.0%</u>
Strongly agree	213	21.3%
Somewhat agree	347	34.7%
<u>Neither agree nor disagree</u>	<u>226</u>	<u>22.6%</u>



Disagree	162	16.2%
Somewhat disagree	107	10.7%
Strongly disagree	54	5.4%
Unsure	53	5.3%
Total	1000	100.0%

16 – 26. The following are some statements made by people who maintain that we need to implement policies that strengthen the U.S. pharmaceutical industry by reducing red tape, reforming the tax code, and protecting intellectual property rights. Please indicate how persuasive you find each argument in convincing you to support implementing policies that strengthen the U.S. pharmaceutical industry.

	Persuasive	Very persuasive	Not Persuasive	Not too persuasive	Unsure	Total
Time and Money: On average, it takes drug companies up to 15 years and over \$2 billion in research and development to receive government approval to bring a new drug to market	54.1% 541	18.7% 187	33.1% 331	17.7% 177	12.8% 128	100.0% 1000
Price Control Shortages: The American Cancer Society reports that government price controls on prescription drugs are creating shortages in primary cancer treatments that result in delayed care	55.8% 558	25.5% 255	32.5% 325	16.9% 169	11.7% 117	100.0% 1000
Global Leader: The U.S. is the global leader in medical innovation, developing nearly half of the new medications and improved treatments available to patients	64.8% 648	24.3% 243	24.6% 246	14.9% 149	10.6% 106	100.0% 1000
Jobs: America's pharmaceutical industry represents 3.2 percent of our economy, employs more than 900,000 workers in high-paying jobs, and supports another 3.5 million jobs across our economy	57.7% 577	19.9% 199	29.5% 295	18.1% 181	12.7% 127	100.0% 1000
Maintain Access: During an era of global uncertainty, it will be	79.5% 795	44.1% 441	15.7% 157	9.3% 93	4.8% 48	100.0% 1000



important for U.S. pharmaceutical companies to continue to develop safe and effective medicines so that American consumers can maintain access to best-in-class prescription medicines

Produce in U.S.:	<u>84.4%</u>	56.8%	<u>10.7%</u>	5.9%	4.9%	100.0%
According to a recent government report, an overwhelming majority of the basic components used in U.S. drugs are manufactured in China; we need to do whatever we can to make sure that U.S. pharmaceutical companies have what they need to continue to produce their products in the U.S	<u>844</u>	568	<u>107</u>	59	49	1000

Foreign Reliance Shortages: According to recent reports, shortages of cancer drugs and other life-saving medications are reaching their worst point in a decade because of an overreliance on unreliable foreign manufacturers that often fail quality controls

Foreign Reliance Shortages: According to recent reports, shortages of cancer drugs and other life-saving medications are reaching their worst point in a decade because of an overreliance on unreliable foreign manufacturers that often fail quality controls	<u>69.9%</u>	38.8%	<u>20.2%</u>	12.5%	9.9%	100.0%
	<u>699</u>	388	<u>202</u>	125	99	1000

Maintain Position Over China: China has announced a 10-year strategic plan to surpass the United States in biotech, so our industry must do whatever it can to maintain its position as an innovative industry leader

Maintain Position Over China: China has announced a 10-year strategic plan to surpass the United States in biotech, so our industry must do whatever it can to maintain its position as an innovative industry leader	<u>73.2%</u>	40.1%	<u>20.4%</u>	11.4%	6.4%	100.0%
	<u>732</u>	401	<u>204</u>	114	64	1000

Protect from Counterfeit Drugs: Law enforcement officials have warned that importing more foreign drugs could significantly raise the risk of Americans receiving counterfeit medications with dangerous ingredients like fentanyl. We need a strong U.S.

Protect from Counterfeit Drugs: Law enforcement officials have warned that importing more foreign drugs could significantly raise the risk of Americans receiving counterfeit medications with dangerous ingredients like fentanyl. We need a strong U.S.	<u>75.1%</u>	46.7%	<u>19.6%</u>	10.7%	5.4%	100.0%
	<u>751</u>	467	<u>196</u>	107	54	1000



pharmaceutical industry
to protect from these
dangerous counterfeit
drugs

Intellectual Property: China has stolen trillions of dollars of American intellectual property, including from our biotech companies. This puts the United States at a competitive disadvantage that we cannot ignore	<u>80.4%</u>	54.8%	<u>12.8%</u>	7.0%	6.8%	100.0%
	<u>804</u>	548	<u>128</u>	70	68	1000

Focus on Greatest Need: Unlike their foreign competitors, American pharmaceutical companies are focusing their efforts to understand and treat disease where people have the greatest need for breakthroughs and new treatments. Combining new technologies in science with our decades of research, they are advancing the prevention and treatment of cancer and new medicines and vaccines that address respiratory syncytial virus (RSV), migraines, and sickle cell disease among others	<u>59.8%</u>	19.5%	<u>29.0%</u>	17.5%	11.2%	100.0%
	<u>598</u>	195	<u>290</u>	175	112	1000

Now knowing this information...

Cost of Drugs Informed

27. In general, do you think the cost of prescription drugs is reasonable or unreasonable?

	Freq.	%
Reasonable	142	14.2%
Unreasonable	770	77.0%
Unsure	89	8.9%
Total	1000	100.0%



Drug Company Prices Informed

28. Which of the following do you agree with more?

	Freq.	%
Drug companies need to charge high prices in order to fund the innovative research necessary for developing new drugs	84	8.4%
Even if U.S. prices were lower, drug companies would still make enough money to invest in research needed to develop new drugs	835	83.5%
Unsure	82	8.2%
Total	1000	100.0%

Understand Cost Informed

29. Do you agree or disagree with the following statement? While I am not happy about the fact that prescription drug prices are high, I understand why they cost what they do.

	Freq.	%
<u>Agree</u>	<u>324</u>	<u>32.4%</u>
Strongly agree	84	8.4%
Somewhat agree	241	24.1%
<u>Neither agree nor disagree</u>	<u>123</u>	<u>12.3%</u>
<u>Disagree</u>	<u>514</u>	<u>51.4%</u>
Somewhat disagree	247	24.7%
Strongly disagree	267	26.7%
Unsure	39	3.9%
Total	1000	100.0%

Prices too High Informed

30. Do you agree or disagree with the following statement? Prescription drug prices are too high, and we should do anything we can, including implementing government price controls, to make them less expensive.

	Freq.	%
<u>Agree</u>	<u>517</u>	<u>51.7%</u>
Strongly agree	249	24.9%
Somewhat agree	268	26.8%
<u>Neither agree nor disagree</u>	<u>101</u>	<u>10.1%</u>
<u>Disagree</u>	<u>325</u>	<u>32.5%</u>
Somewhat disagree	149	14.9%
Strongly disagree	176	17.6%
Unsure	56	5.6%
Total	1000	100.0%



Age of Discovery Informed

31. Do you agree or disagree with the following statement? We are currently in an age of unprecedented medical discovery with new drug discoveries occurring at a pace far beyond anything the industry has ever experienced.

	Freq.	%
<u>Agree</u>	<u>537</u>	<u>53.7%</u>
Strongly agree	174	17.4%
Somewhat agree	364	36.4%
<u>Neither agree nor disagree</u>	<u>211</u>	<u>21.1%</u>
<u>Disagree</u>	<u>163</u>	<u>16.3%</u>
Somewhat disagree	112	11.2%
Strongly disagree	51	5.1%
Unsure	89	8.9%
Total	1000	100.0%

More Drug and Treatment Options Informed

32. Do you agree or disagree with the following statement? More new drugs and treatment options are being discovered now than at any time in the history of medicine.

	Freq.	%
<u>Agree</u>	<u>563</u>	<u>56.3%</u>
Strongly agree	221	22.1%
Somewhat agree	342	34.2%
<u>Neither agree nor disagree</u>	<u>193</u>	<u>19.3%</u>
<u>Disagree</u>	<u>146</u>	<u>14.6%</u>
Somewhat disagree	97	9.7%
Strongly disagree	50	5.0%
Unsure	97	9.7%
Total	1000	100.0%

Reasonably Priced Verbatim

33. What could you learn about this issue that might convince you that prescription drugs are reasonably priced, and why? You can use as many or as few words as you'd like. Please avoid slang and abbreviations when possible.

See Verbatim File.

	Freq.	%
Business	2	0.2%
China	21	2.1%
Expensive but insurance helps	13	1.3%



Expensive but result helps	2	0.2%
Expensive, cheaper in other countries	24	2.4%
Expensive: Competition	1	0.1%
Expensive: Corruption	3	0.3%
Expensive: Foreign Aid	7	0.7%
Expensive: Govt Involvement	43	4.3%
Expensive: Insurance	6	0.6%
Expensive: Marketing	13	1.3%
Expensive: Monopoly	1	0.1%
Expensive: Nondisclosure	1	0.1%
Expensive: Salary	55	5.5%
Expensive: Supply and Demand	2	0.2%
Govt Involvement	9	0.9%
Production	16	1.6%
Rare Disease	2	0.2%
Research/Development	32	3.2%
Other	23	2.3%
None, expensive regardless	357	35.7%
NA	367	36.7%
Total	1000	100.0%

34. Are you female or male?

	Freq.	%
Female	500	50.0%
Male	500	50.0%
Other	0	0.0%
Total	1000	100.0%

35. What age range do you fall within?

	Freq.	%
<u>Under 55</u>	<u>444</u>	<u>44.4%</u>
18 – 29	82	8.2%
30 – 44	187	18.7%
45 – 54	175	17.5%
<u>55 and Over</u>	<u>556</u>	<u>55.6%</u>
55 – 64	221	22.1%
65+	335	33.5%
Total	1000	100.0%

36. Generally speaking, do you think of yourself as a Democrat, Republican, or Independent?

	Freq.	%
<u>Republican</u>	<u>697</u>	<u>69.7%</u>
Strongly Republican	383	38.3%



Mostly Republican	314	31.4%
<u>Independent</u>	<u>303</u>	<u>30.3%</u>
Total	1000	100.0%

37. And thinking about your views toward politics and government, would you say you are...

	Freq.	%
<u>Conservative</u>	<u>788</u>	<u>78.8%</u>
Extremely conservative	172	17.2%
Very conservative	322	32.2%
Somewhat conservative	294	29.4%
<u>Moderate</u>	<u>153</u>	<u>15.3%</u>
<u>Liberal</u>	<u>20</u>	<u>2.0%</u>
Unsure	39	3.9%
Total	1000	100.0%

38. Do you consider the area where you live to be more rural, suburban, or urban?

	Freq.	%
Rural	403	40.3%
Suburban	476	47.6%
Urban	119	11.9%
Refused	2	0.2%
Total	1000	100.0%

39. What annual household income range do you fall within out of the following options?

	Freq.	%
Up to \$10,000	13	1.3%
\$10,000 - \$15,000	22	2.2%
\$15,000 - \$25,000	34	3.4%
\$25,000 - \$35,000	54	5.4%
\$35,000 - \$50,000	98	9.8%
\$50,000 - \$75,000	130	13.0%
\$75,000 - \$100,000	153	15.3%
\$100,000 - \$150,000	199	19.9%
\$150,000 - \$200,000	108	10.8%
\$200,000+	88	8.8%
Unsure	103	10.3%
Total	1000	100.0%

40. Which of the following best describes your race or ethnicity?

	Freq.	%
White or Caucasian	860	86.0%



Asian or Pacific Islander	9	0.9%
Black or African American	11	1.1%
Hispanic or Latino	40	4.0%
Other	42	4.2%
Unsure	38	3.8%
Total	1000	100.0%

41. Thinking back, who did you vote for in the 2020 election for President?

	Freq.	%
Republican Donald Trump	763	76.3%
Democrat Joe Biden	100	10.0%
Another candidate	57	5.7%
Did not vote in 2020	29	2.9%
Unsure	52	5.2%
Total	1000	100.0%

42. What is your present marital status?

	Freq.	%
Single	141	14.1%
Married	684	68.4%
Divorced	70	7.0%
Separated	2	0.2%
Widow/Widower	55	5.5%
Domestic Partnership	23	2.3%
Unsure	25	2.5%
Total	1000	100.0%

43. What's the highest level of education you have completed?

	Freq.	%
<u>No degree</u>	<u>627</u>	<u>62.7%</u>
Some high school	18	1.8%
High school diploma/GED	140	14.0%
Technical Certification	75	7.5%
Some college or Associate's Degree	395	39.5%
<u>At least College</u>	<u>356</u>	<u>35.6%</u>
Four-year undergraduate or Bachelor's Degree	195	19.5%
Graduate degree or further	161	16.1%
Unsure	17	1.7%
Total	1000	100.0%

44. General Election X of 4

	Freq.	%
0 of 4	11	1.1%



1 of 4	70	7.0%
2 of 4	127	12.7%
3 of 4	172	17.2%
4 of 4	619	61.9%
Total	1000	100.0%

45. Geo

	Freq.	%
West	205	20.5%
Midwest	233	23.3%
Northeast	167	16.7%
South	395	39.5%
Total	1000	100.0%

46. Age + Income

	Freq.	%
<65 <\$50k	121	12.1%
<65 \$50k-\$75k	80	8.0%
<65 \$75k-\$100k	107	10.7%
<65 \$100k+	306	30.6%
65+ <\$50k	99	9.9%
65+ \$50k-\$75k	49	4.9%
65+ \$75k-\$100k	46	4.6%
65+ \$100k+	88	8.8%
Unsure	103	10.3%
Total	1000	100.0%

47. Gender + Age

	Freq.	%
F 18 - 29	28	2.8%
F 30 - 44	92	9.2%
F 45 - 54	93	9.3%
F 55 - 64	112	11.2%
F 65+	175	17.5%
M 18 - 29	54	5.4%
M 30 - 44	95	9.5%
M 45 - 54	81	8.1%
M 55 - 64	110	11.0%
M 65+	160	16.0%
Total	1000	100.0%

48. Race + Gender

	Freq.	%
White Female	440	44.0%
White Male	420	42.0%



Asian Female	3	0.3%
Asian Male	6	0.6%
Black Female	2	0.2%
Black Male	8	0.8%
Hispanic Female	13	1.3%
Hispanic Male	28	2.8%
Other Female	26	2.6%
Other Male	16	1.6%
Unsure	38	3.8%
Total	1000	100.0%

49. Gender + Education

	Freq.	%
Female At least College	164	16.4%
Female No degree	330	33.0%
Male At least College	192	19.2%
Male No degree	297	29.7%
Unsure	17	1.7%
Total	1000	100.0%

METHODOLOGY

This probabilistic survey was conducted June 5 - 8, 2023, with 1000 likely right-leaning general election voters. It has a margin of error of $\pm 3.02\%$. Known registered voters were interviewed via live phones and SMS. This survey was weighted to a likely right-leaning general election voter universe.

ABOUT THE FIRM

[Cygnal](#) is an award-winning international polling, public opinion, and predictive analytics firm that pioneered multi-mode polling, text-to-web collection, and emotive analysis. Cygnal consistently ranks as the most accurate firm, and clients rely on Cygnal's ability to create intelligence for action. Its team members have worked in 48 states and multiple countries on more than 2,700 corporate, public affairs, and political campaigns.

