

June 9, 2023



CYGNAL

Survey of Likely Right-Leaning
General Election Voters
National

June 5 – 8, 2023 | n=1000 | $\pm 3.02\%$

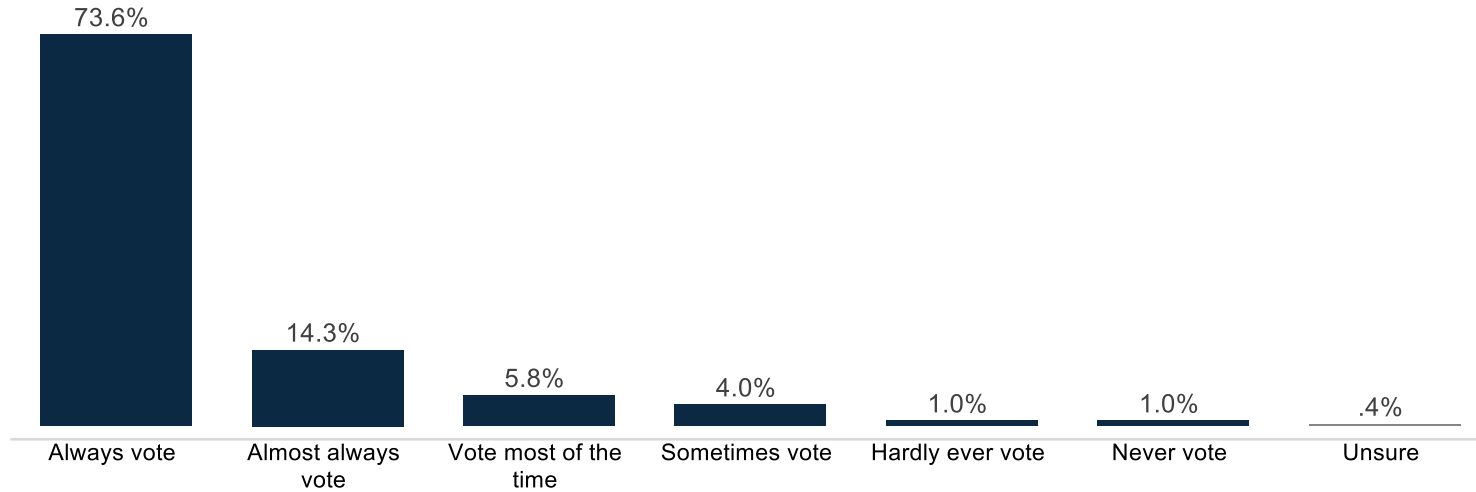
Insights & Analysis

- The sample of Independent and Republican-leaning likely general election voters identifies as **38% strongly Republican, 31% mostly Republican, and 30% Independent.**
- On the image tests, the ratings from 0-10 were **sorted into a rating scale** as follows: 0-1 very unfavorable, 2-4 somewhat unfavorable, 5-7 somewhat favorable, 8-10 very favorable.
 - **Pfizer** (-10 net favorable) is most favorable to more moderate voters, higher-educated voters, and voters aged 50+. The younger and more conservative the voter, the more unfavorable they find Pfizer.
 - **Moderna** (-13 net fav) is slightly more unfavorable than Pfizer with similar opinions from voters, and **Johnson & Johnson** (+12 net fav) has a broader favorability but is still most unfavorable to those who identify as extremely conservative.
 - Companies like **General Electric** (+47 net fav), **Apple** (+36 net fav), and **ExxonMobil** (+29 net fav) are generally favorable. **Patagonia** (even net fav) is unknown to 39% of voters.
- On the cost of drugs, **83% believe the cost is unreasonable** and just 11% believe the cost is reasonable. The sentiment is consistent across all most all groups, just those aged 55+ and college-educated men have a stronger reasonable responses.
 - A quarter of voters agree that they **understand the cost of drugs** while 6-in-10 disagree that they understand the cost.
- **A majority of voters agree that we should do everything we can to lower the prices of drugs** while a third disagree. Men and the most conservative voters disagree.
- **A majority also agree that we are in the age of unprecedented medical discovery** as this opinion is consistent across the electorate.

Insights & Analysis

- Similarly, 56% **agree that more new drugs and treatment options** are being discovered now than at any time in the history of medicine.
- Message maps (slides 24-38) show which messages are most effective in influencing voters that while they might not be happy about the cost of drugs, **they understand why they cost what they do.**
 - Overall, there is positive movement within each message. **“Maintain Access”** stands out as most effective message among Independents and men 55+.
 - **“Global Leader”** stands out among Republicans.

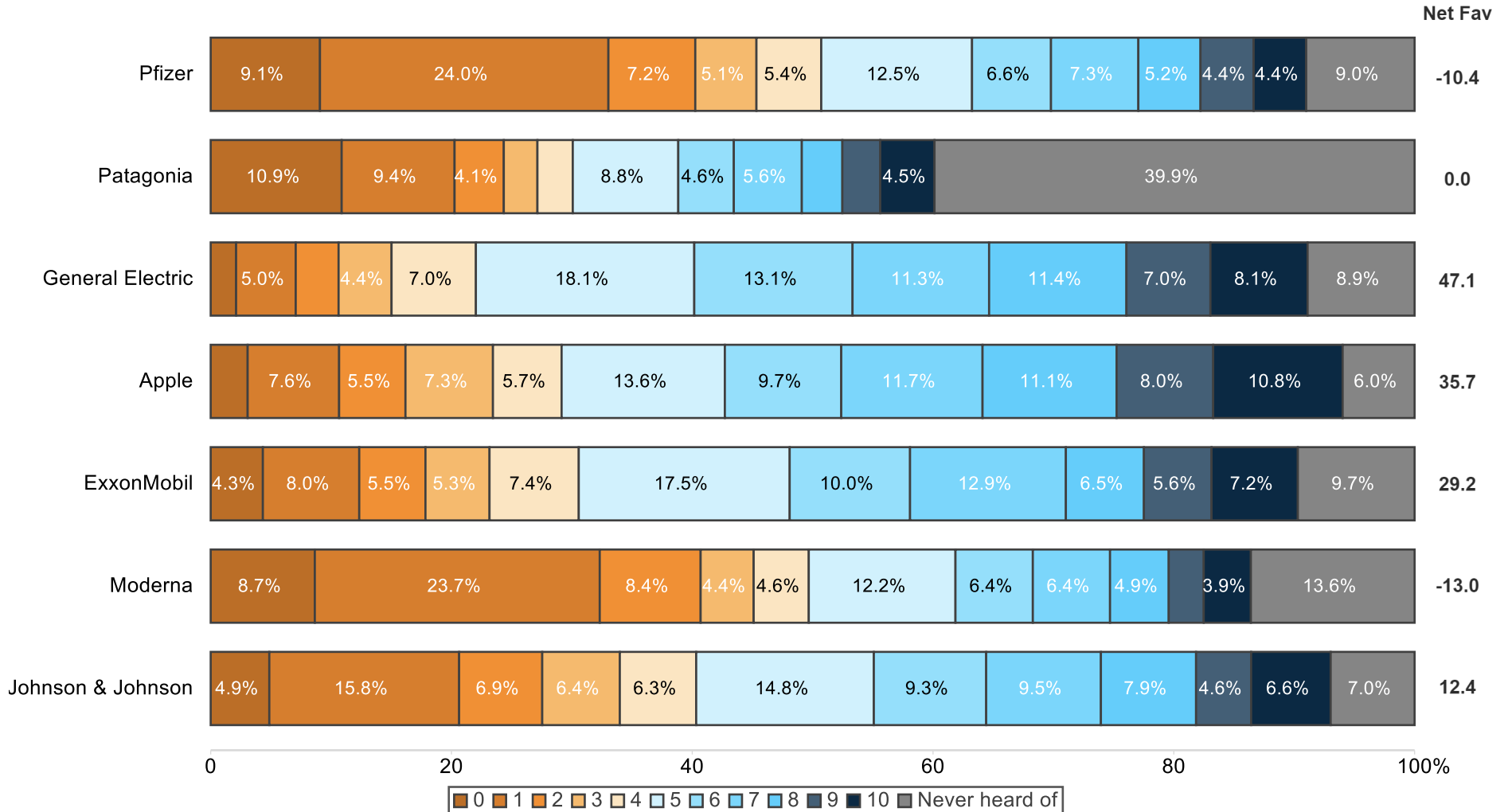
Vote Frequency



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Somewhat Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Always vote	57%	75%	74%	85%	83%	77%	67%	67%	80%	65%	72%	76%	75%	69%	85%	83%	69%	57%	72%	82%	78%	41%	57%	58%	85%
Almost always vote	21%	15%	12%	9%	7%	13%	18%	18%	11%	19%	10%	15%	15%	14%	9%	12%	18%	19%	15%	12%	15%	20%	20%	21%	10%
Vote most of the time	7%	5%	7%	4%	6%	5%	7%	4%	3%	7%	9%	5%	5%	7%	5%	2%	6%	10%	6%	4%	0%	10%	12%	11%	3%
Sometimes vote	9%	4%	4%	1%	2%	2%	4%	9%	2%	5%	7%	3%	3%	5%	1%	2%	5%	7%	4%	0%	7%	13%	7%	7%	1%
Hardly ever vote	3%	1%	1%	0%	1%	0%	2%	1%	2%	1%	1%	0%	1%	2%	0%	0%	1%	4%	1%	2%	0%	13%	0%	0%	0%
Never vote	2%	0%	2%	0%	1%	1%	2%	0%	0%	3%	0%	1%	1%	1%	1%	0%	1%	2%	1%	0%	0%	3%	2%	1%	0%
Unsure	1%	0%	0%	0%	1%	0%	0%	1%	1%	0%	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	1%	1%	0%

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

Image Tests



Unfavorable (0-4), Favorable (5-10)

Very unfavorable (0-1), Somewhat unfavorable (2-4), Somewhat favorable (5-7), Very favorable (8-10)

Image Tests Heatmaps

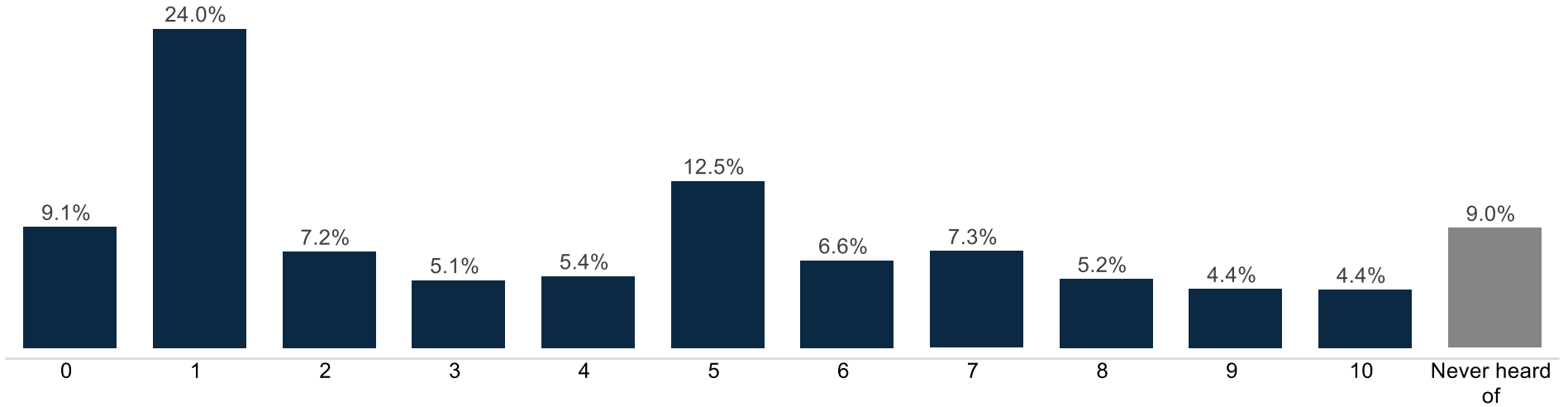
Unfavorable (0-4)

	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwhlt Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Pfizer	59%	44%	61%	42%	41%	56%	50%	50%	54%	50%	49%	50%	52%	47%	66%	54%	46%	40%	49%	59%	56%	55%	52%	52%	50%
Patagonia	25%	30%	34%	31%	29%	33%	28%	26%	23%	31%	26%	35%	33%	23%	47%	33%	22%	22%	28%	46%	30%	23%	32%	28%	31%
General Electric	24%	23%	22%	19%	13%	25%	23%	24%	21%	21%	25%	22%	23%	20%	25%	25%	15%	26%	21%	38%	32%	27%	24%	20%	22%
Apple	28%	24%	35%	31%	25%	37%	25%	27%	30%	26%	27%	32%	29%	29%	38%	33%	26%	21%	27%	41%	30%	27%	30%	28%	30%
ExxonMobil	34%	34%	36%	20%	23%	29%	33%	35%	34%	30%	29%	30%	29%	35%	29%	30%	25%	41%	30%	37%	49%	42%	33%	33%	28%
Moderna	58%	42%	61%	42%	39%	57%	49%	48%	50%	49%	51%	49%	52%	45%	66%	55%	43%	38%	48%	59%	51%	52%	50%	50%	49%
Johnson & Johnson	44%	35%	57%	29%	32%	48%	38%	40%	42%	37%	42%	41%	41%	40%	54%	44%	34%	35%	39%	54%	46%	59%	38%	41%	38%

Favorable (5-10)

	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwhlt Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Pfizer	33%	44%	33%	48%	54%	34%	39%	42%	35%	40%	40%	43%	37%	48%	23%	38%	44%	53%	42%	34%	33%	41%	39%	39%	41%
Patagonia	40%	20%	39%	26%	43%	25%	21%	44%	31%	28%	33%	30%	26%	40%	13%	25%	37%	45%	32%	18%	37%	45%	31%	29%	28%
General Electric	67%	65%	70%	74%	81%	67%	65%	68%	66%	69%	65%	72%	67%	73%	62%	68%	76%	65%	71%	55%	57%	65%	67%	69%	70%
Apple	68%	65%	64%	63%	72%	59%	67%	68%	62%	64%	67%	66%	64%	66%	55%	63%	67%	74%	67%	55%	59%	67%	60%	65%	65%
ExxonMobil	55%	52%	58%	72%	71%	64%	52%	58%	51%	57%	63%	64%	61%	58%	60%	60%	67%	51%	61%	54%	40%	50%	58%	54%	62%
Moderna	33%	39%	32%	42%	51%	30%	33%	42%	34%	36%	37%	39%	33%	45%	22%	31%	43%	51%	38%	32%	39%	36%	37%	36%	37%
Johnson & Johnson	50%	55%	40%	63%	61%	47%	54%	53%	49%	55%	49%	54%	52%	55%	40%	50%	58%	58%	55%	42%	37%	37%	53%	50%	55%

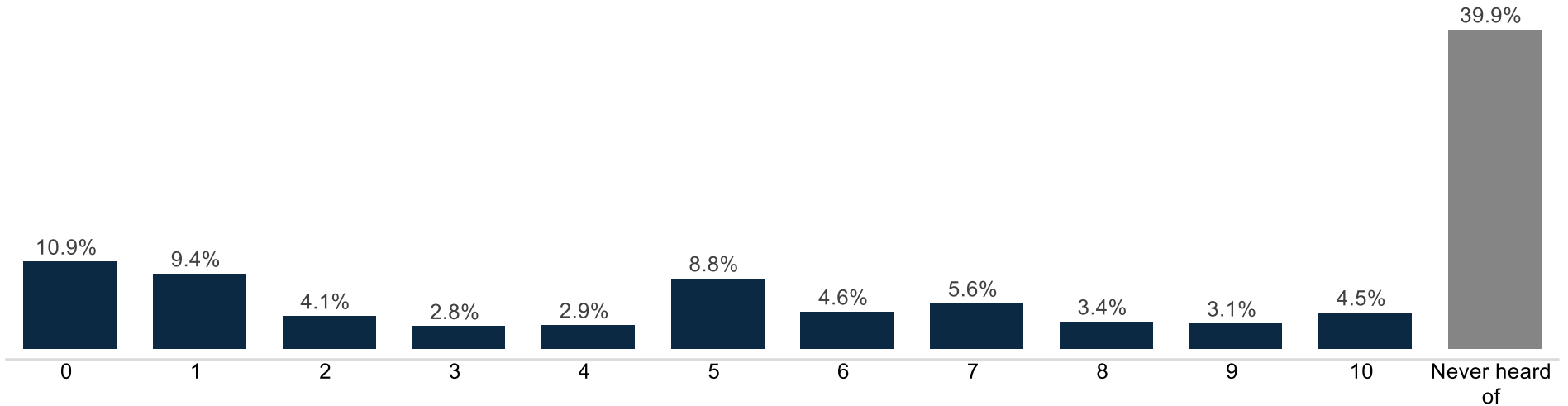
Image: Pfizer



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Somewhat Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Very unfavorable	41%	27%	45%	23%	25%	36%	34%	30%	34%	31%	32%	34%	34%	31%	49%	36%	29%	21%	31%	54%	41%	37%	38%	34%	32%
Somewhat unfavorable	19%	16%	16%	19%	16%	20%	16%	20%	20%	19%	17%	16%	18%	16%	17%	18%	17%	19%	18%	5%	14%	17%	14%	18%	18%
Somewhat favorable	21%	27%	24%	31%	36%	24%	25%	25%	23%	25%	26%	29%	25%	30%	16%	26%	29%	32%	28%	28%	17%	24%	24%	26%	27%
Very favorable	12%	17%	9%	17%	18%	10%	14%	17%	12%	16%	14%	14%	12%	18%	7%	12%	15%	21%	15%	6%	16%	17%	15%	13%	13%
0	14%	7%	12%	5%	7%	9%	10%	9%	9%	10%	9%	9%	10%	11%	10%	9%	6%	9%	13%	14%	4%	13%	15%	7%	
1	27%	21%	33%	18%	19%	27%	24%	21%	25%	21%	23%	25%	25%	20%	38%	26%	19%	15%	22%	41%	27%	34%	25%	19%	24%
2	7%	9%	7%	6%	6%	7%	7%	10%	7%	7%	7%	8%	7%	7%	6%	7%	5%	11%	8%	0%	5%	7%	5%	8%	7%
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5	12%	10%	15%	13%	17%	12%	11%	11%	13%	12%	12%	13%	11%	16%	10%	11%	15%	13%	13%	12%	17%	16%	14%	12%	12%
6	4%	8%	5%	8%	9%	6%	6%	7%	5%	6%	8%	7%	6%	7%	2%	8%	8%	6%	8%	0%	0%	3%	4%	6%	8%
7	5%	9%	4%	9%	9%	6%	8%	7%	5%	7%	6%	9%	7%	8%	4%	8%	6%	13%	7%	16%	0%	6%	6%	8%	7%
8	4%	6%	3%	7%	7%	5%	5%	5%	4%	6%	4%	6%	4%	8%	3%	4%	4%	10%	6%	0%	11%	9%	7%	4%	4%
9	3%	5%	2%	6%	7%	3%	4%	6%	4%	4%	6%	4%	5%	4%	3%	3%	6%	5%	5%	0%	0%	2%	3%	5%	5%
10	5%	6%	3%	4%	4%	3%	5%	6%	4%	5%	4%	4%	6%	2%	5%	4%	6%	4%	6%	6%	6%	5%	4%	4%	
Never heard of	7%	12%	6%	10%	5%	9%	11%	8%	11%	9%	11%	7%	11%	5%	11%	8%	11%	7%	9%	7%	11%	4%	10%	9%	10%

Using a zero-to-ten scale, where a ten means you have an extremely favorable impression and a zero means you have an extremely unfavorable impression, please indicate whether you have a favorable or unfavorable impression of Pfizer.

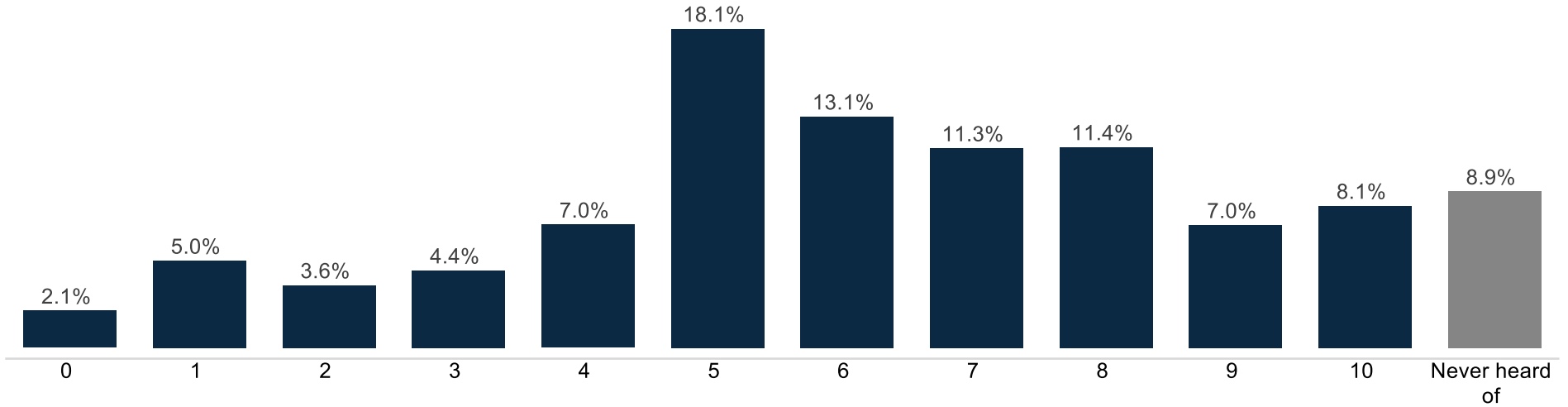
Image: Patagonia



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Consrv	Very Consrv	Smwht Consrv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Very unfavorable	16%	21%	22%	21%	18%	22%	20%	17%	15%	23%	17%	23%	22%	16%	35%	22%	14%	14%	18%	36%	30%	16%	24%	21%	20%
Somewhat unfavorable	8%	9%	13%	10%	11%	12%	8%	9%	9%	8%	9%	12%	11%	7%	12%	11%	8%	8%	10%	10%	0%	7%	8%	7%	11%
Somewhat favorable	24%	10%	28%	18%	26%	21%	12%	25%	15%	21%	19%	20%	17%	24%	11%	18%	23%	24%	21%	6%	15%	29%	22%	19%	18%
Very favorable	16%	10%	11%	8%	17%	5%	9%	19%	16%	7%	14%	9%	9%	16%	2%	8%	14%	21%	11%	13%	22%	16%	9%	11%	11%
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10	7%	3%	4%	5%	7%	2%	4%	7%	8%	3%	6%	3%	3%	8%	1%	2%	6%	10%	4%	7%	6%	7%	5%	4%	4%
Never heard of	36%	50%	27%	44%	28%	42%	51%	30%	45%	41%	41%	36%	42%	36%	40%	42%	41%	33%	40%	36%	33%	32%	37%	43%	41%

Using a zero-to-ten scale, where a ten means you have an extremely favorable impression and a zero means you have an extremely unfavorable impression, please indicate whether you have a favorable or unfavorable impression of Patagonia.

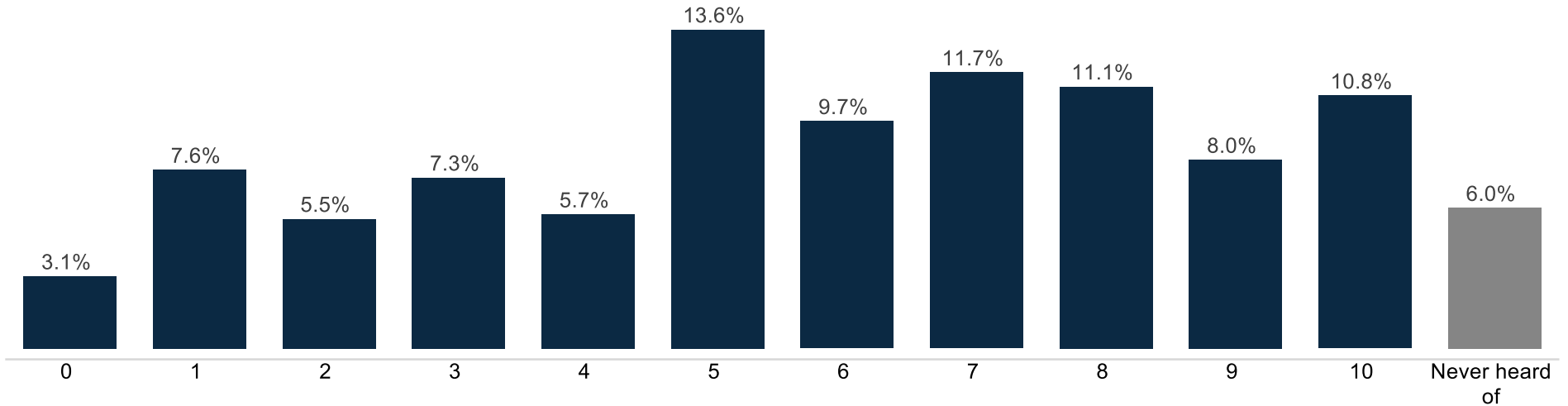
Image: General Electric



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Somewhat Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Very unfavorable	7%	8%	9%	4%	4%	8%	8%	7%	6%	7%	10%	6%	7%	6%	9%	8%	5%	8%	6%	21%	16%	7%	12%	6%	6%
Somewhat unfavorable	17%	15%	13%	15%	9%	17%	15%	17%	15%	13%	15%	16%	15%	14%	15%	18%	11%	18%	15%	17%	16%	20%	13%	14%	15%
Somewhat favorable	46%	33%	50%	43%	50%	44%	38%	41%	42%	42%	41%	44%	41%	47%	41%	42%	44%	41%	43%	37%	47%	44%	46%	41%	42%
Very favorable	21%	31%	20%	31%	31%	23%	27%	28%	23%	27%	24%	29%	27%	26%	21%	26%	32%	24%	28%	19%	10%	21%	21%	28%	28%
0	4%	2%	3%	0%	1%	2%	3%	3%	1%	3%	3%	2%	2%	3%	2%	2%	1%	4%	2%	9%	0%	3%	5%	2%	2%
1	4%	6%	6%	4%	3%	6%	5%	4%	5%	4%	7%	5%	6%	4%	7%	6%	4%	4%	4%	12%	16%	4%	7%	4%	5%
2	4%	4%	2%	3%	1%	4%	3%	6%	4%	3%	3%	4%	3%	4%	5%	3%	3%	4%	3%	10%	0%	5%	4%	2%	4%
3	3%	4%	7%	5%	5%	6%	4%	2%	5%	4%	5%	4%	4%	5%	4%	5%	3%	7%	4%	4%	16%	7%	3%	9%	3%
4	10%	7%	4%	7%	3%	8%	8%	9%	6%	6%	7%	8%	8%	5%	7%	9%	5%	8%	7%	3%	0%	8%	6%	4%	8%
5	22%	12%	25%	16%	21%	19%	16%	17%	23%	16%	18%	17%	17%	21%	16%	18%	18%	18%	17%	19%	26%	27%	18%	19%	17%
6	12%	11%	17%	13%	16%	15%	11%	11%	8%	15%	10%	15%	13%	13%	13%	13%	15%	10%	14%	15%	10%	12%	15%	14%	13%
7	13%	11%	8%	14%	13%	10%	11%	13%	11%	11%	13%	12%	11%	12%	12%	11%	11%	13%	12%	3%	11%	5%	12%	8%	13%
8	10%	13%	8%	14%	14%	9%	10%	14%	13%	12%	7%	12%	11%	11%	7%	11%	14%	14%	12%	9%	5%	10%	4%	14%	13%
9	4%	10%	4%	9%	9%	5%	7%	8%	3%	6%	10%	8%	7%	7%	6%	8%	8%	4%	8%	3%	0%	4%	7%	6%	7%
10	7%	9%	8%	8%	8%	8%	9%	6%	7%	10%	7%	8%	8%	8%	9%	7%	10%	6%	8%	7%	5%	7%	9%	8%	8%
Never heard of	9%	12%	8%	7%	6%	8%	12%	8%	13%	10%	10%	5%	10%	7%	13%	7%	8%	9%	8%	7%	11%	8%	9%	11%	8%

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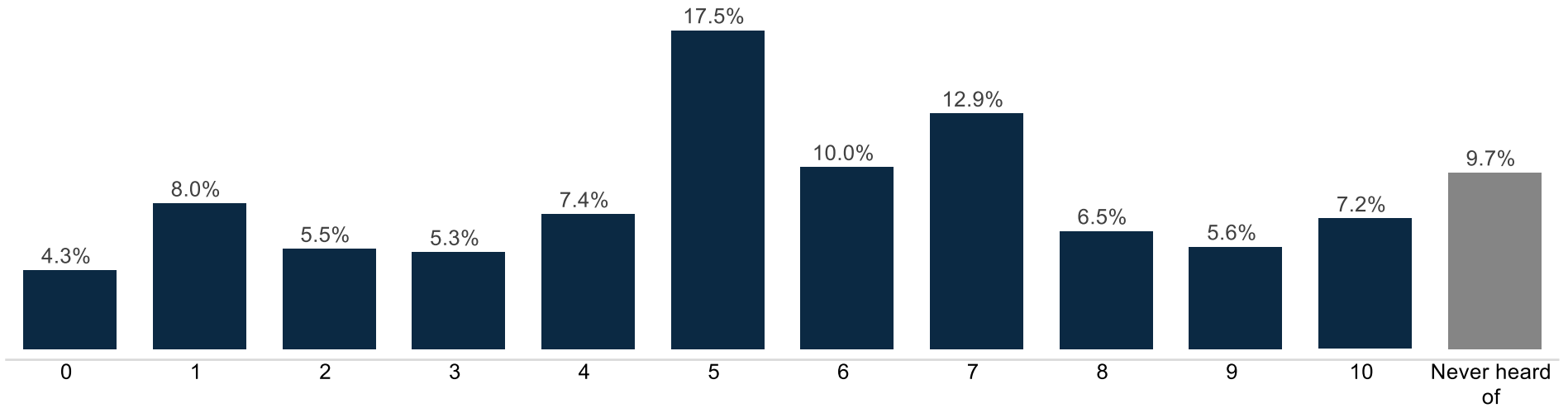
Image: Apple



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Consrv	Very Consrv	Smwht Consrv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Very unfavorable	10%	9%	13%	10%	7%	14%	10%	8%	9%	8%	12%	12%	11%	10%	19%	11%	9%	6%	9%	24%	15%	16%	12%	13%	9%
Somewhat unfavorable	18%	15%	21%	20%	18%	23%	15%	18%	21%	17%	15%	19%	18%	19%	19%	22%	17%	15%	19%	17%	15%	11%	18%	15%	20%
Somewhat favorable	39%	34%	35%	33%	36%	33%	36%	37%	33%	36%	35%	35%	35%	35%	35%	37%	33%	36%	29%	48%	36%	28%	35%	37%	
Very favorable	29%	32%	29%	30%	36%	25%	31%	31%	29%	28%	33%	30%	29%	31%	20%	26%	34%	38%	31%	26%	10%	31%	32%	31%	29%
0	3%	3%	4%	2%	1%	5%	3%	3%	1%	3%	3%	4%	3%	3%	5%	4%	2%	2%	3%	3%	0%	5%	5%	3%	2%
1	7%	6%	9%	8%	6%	10%	7%	5%	8%	5%	10%	8%	8%	7%	14%	7%	7%	5%	6%	21%	15%	10%	8%	9%	7%
2	6%	3%	6%	8%	5%	8%	4%	5%	6%	5%	6%	5%	5%	6%	5%	8%	4%	6%	6%	6%	0%	6%	5%	3%	6%
3	7%	6%	9%	8%	6%	10%	6%	6%	11%	7%	5%	7%	7%	7%	8%	9%	7%	4%	7%	12%	10%	5%	7%	5%	8%
4	5%	6%	6%	5%	7%	5%	5%	8%	3%	6%	5%	7%	5%	7%	7%	6%	6%	5%	6%	0%	5%	0%	6%	6%	6%
5	14%	11%	19%	11%	16%	14%	12%	13%	13%	15%	11%	14%	13%	14%	15%	15%	11%	14%	13%	10%	27%	21%	12%	13%	13%
6	11%	9%	7%	11%	10%	9%	10%	10%	7%	12%	12%	9%	9%	10%	11%	8%	10%	10%	11%	7%	6%	5%	6%	9%	11%
7	14%	13%	9%	10%	10%	10%	14%	14%	13%	10%	11%	12%	12%	10%	9%	14%	12%	12%	12%	12%	16%	10%	11%	13%	12%
8	11%	12%	10%	12%	10%	11%	10%	13%	11%	11%	13%	10%	11%	13%	6%	10%	13%	15%	12%	5%	0%	12%	15%	10%	10%
9	5%	10%	8%	9%	11%	7%	8%	7%	7%	7%	7%	9%	8%	9%	4%	6%	9%	10%	8%	4%	10%	9%	6%	7%	9%
10	13%	11%	11%	9%	15%	7%	13%	10%	11%	9%	12%	11%	11%	10%	10%	9%	12%	13%	11%	17%	0%	10%	12%	13%	10%
Never heard of	4%	10%	1%	7%	3%	5%	9%	6%	8%	10%	5%	3%	7%	5%	7%	4%	7%	5%	6%	4%	11%	6%	10%	7%	5%

Using a zero-to-ten scale, where a ten means you have an extremely favorable impression and a zero means you have an extremely unfavorable impression, please indicate whether you have a favorable or unfavorable impression of Apple.

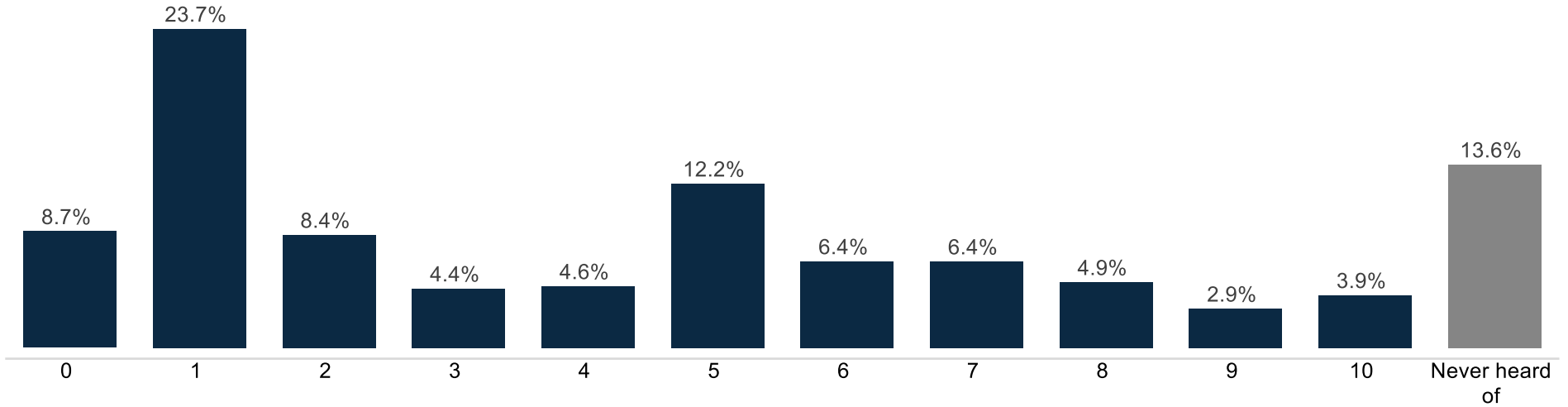
Image: ExxonMobil



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Somewhat Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Very unfavorable	13%	12%	19%	7%	10%	14%	12%	13%	11%	12%	13%	13%	10%	17%	16%	10%	9%	17%	12%	21%	27%	22%	18%	14%	10%
Somewhat unfavorable	21%	22%	17%	13%	13%	15%	21%	22%	23%	18%	17%	16%	18%	18%	13%	20%	16%	24%	18%	16%	23%	20%	15%	20%	18%
Somewhat favorable	45%	33%	43%	43%	45%	41%	35%	45%	36%	38%	45%	42%	40%	43%	38%	40%	46%	38%	41%	43%	34%	36%	45%	40%	40%
Very favorable	10%	19%	16%	30%	26%	22%	17%	12%	14%	19%	18%	23%	21%	15%	23%	20%	21%	12%	20%	11%	5%	14%	13%	14%	23%
0	5%	5%	7%	1%	5%	3%	4%	7%	1%	5%	5%	5%	3%	8%	5%	4%	2%	7%	4%	9%	10%	5%	6%	5%	4%
1	8%	7%	12%	6%	5%	11%	8%	6%	10%	7%	7%	8%	8%	9%	11%	6%	7%	10%	8%	13%	16%	17%	12%	9%	6%
2	7%	8%	3%	4%	4%	3%	6%	12%	5%	6%	4%	6%	5%	6%	4%	6%	3%	9%	6%	4%	0%	5%	4%	5%	6%
3	4%	4%	8%	5%	4%	7%	5%	4%	7%	6%	3%	5%	6%	3%	5%	7%	4%	5%	5%	4%	5%	7%	3%	7%	5%
4	10%	9%	6%	4%	6%	5%	10%	7%	11%	6%	9%	5%	7%	8%	4%	7%	9%	10%	7%	8%	18%	9%	8%	7%	7%
5	26%	14%	18%	14%	15%	17%	20%	18%	20%	16%	17%	17%	17%	18%	15%	18%	19%	17%	18%	23%	14%	23%	21%	20%	16%
6	7%	10%	10%	13%	12%	11%	7%	12%	7%	10%	16%	9%	9%	12%	9%	9%	11%	13%	10%	7%	11%	8%	6%	10%	11%
7	12%	10%	15%	16%	18%	13%	8%	15%	9%	12%	13%	16%	13%	13%	13%	13%	15%	9%	13%	12%	10%	5%	19%	10%	13%
8	1%	6%	6%	12%	11%	8%	5%	3%	5%	6%	6%	7%	7%	5%	7%	7%	7%	5%	7%	7%	0%	5%	3%	3%	8%
9	4%	5%	3%	10%	5%	9%	4%	5%	4%	7%	4%	7%	6%	5%	9%	5%	6%	3%	6%	0%	0%	5%	3%	3%	7%
10	5%	8%	7%	8%	11%	5%	8%	4%	5%	6%	8%	9%	8%	6%	7%	8%	8%	5%	8%	4%	5%	4%	7%	8%	7%
Never heard of	11%	14%	5%	8%	6%	7%	15%	8%	16%	12%	8%	6%	11%	7%	10%	10%	8%	9%	9%	9%	11%	8%	9%	12%	9%

Using a zero-to-ten scale, where a ten means you have an extremely favorable impression and a zero means you have an extremely unfavorable impression, please indicate whether you have a favorable or unfavorable impression of ExxonMobil.

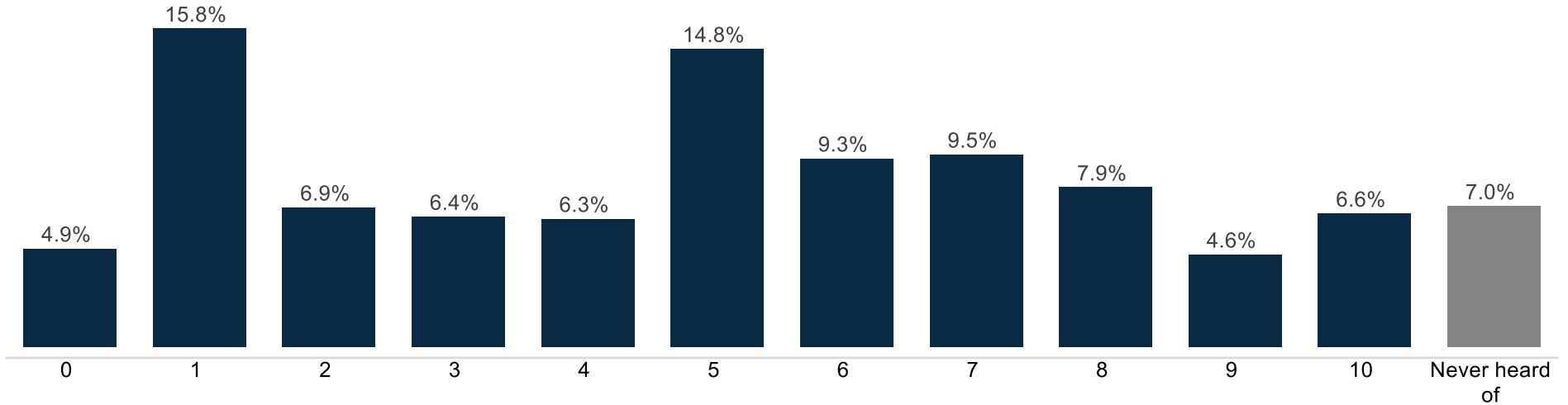
Image: Moderna



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Consv	Very Consv	Smwht Consv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Very unfavorable	35%	29%	45%	23%	26%	36%	34%	26%	31%	32%	30%	34%	34%	29%	48%	37%	27%	20%	31%	51%	36%	39%	34%	32%	31%
Somewhat unfavorable	22%	14%	16%	19%	13%	21%	15%	22%	19%	17%	21%	15%	18%	16%	18%	17%	17%	18%	17%	7%	15%	13%	15%	18%	18%
Somewhat favorable	22%	25%	26%	27%	35%	22%	22%	26%	21%	24%	25%	27%	23%	30%	16%	22%	30%	31%	26%	25%	22%	23%	26%	24%	25%
Very favorable	11%	14%	6%	15%	16%	8%	11%	16%	12%	11%	12%	12%	10%	15%	6%	9%	12%	20%	12%	7%	17%	13%	11%	12%	11%
0	11%	8%	10%	6%	6%	9%	9%	11%	7%	9%	8%	10%	9%	8%	13%	11%	6%	5%	9%	12%	14%	8%	11%	11%	8%
1	24%	21%	35%	17%	19%	27%	25%	16%	23%	24%	22%	24%	25%	21%	35%	26%	20%	15%	22%	39%	21%	31%	23%	21%	24%
2	13%	7%	6%	7%	5%	8%	8%	15%	11%	8%	8%	7%	9%	8%	9%	9%	6%	10%	8%	3%	10%	6%	9%	7%	9%
3	5%	1%	4%	7%	4%	7%	2%	5%	4%	4%	8%	3%	5%	4%	5%	4%	4%	5%	5%	0%	0%	4%	1%	4%	5%
4	3%	5%	5%	5%	4%	6%	5%	2%	4%	5%	5%	5%	4%	4%	4%	4%	6%	3%	4%	5%	6%	3%	5%	7%	4%
5	14%	10%	15%	11%	14%	12%	10%	13%	13%	12%	11%	12%	11%	16%	9%	10%	14%	15%	13%	9%	11%	15%	12%	11%	12%
6	6%	7%	7%	6%	9%	5%	5%	8%	4%	8%	6%	7%	6%	6%	5%	7%	7%	7%	7%	6%	0%	6%	8%	7%	6%
7	3%	8%	5%	9%	11%	4%	7%	5%	4%	5%	7%	8%	6%	8%	2%	4%	9%	9%	6%	10%	11%	3%	5%	6%	7%
8	5%	5%	2%	7%	8%	3%	4%	8%	5%	4%	2%	7%	4%	7%	3%	3%	5%	10%	5%	0%	11%	8%	5%	4%	4%
9	1%	3%	1%	6%	6%	2%	2%	3%	1%	3%	7%	2%	3%	3%	1%	2%	4%	4%	3%	3%	0%	0%	3%	3%	3%
10	4%	5%	4%	3%	2%	4%	5%	5%	6%	5%	3%	3%	3%	5%	2%	4%	3%	6%	4%	4%	6%	4%	3%	5%	4%
Never heard of	9%	19%	7%	16%	9%	14%	18%	10%	16%	15%	13%	12%	15%	9%	12%	14%	14%	11%	14%	9%	10%	12%	14%	14%	14%

Using a zero-to-ten scale, where a ten means you have an extremely favorable impression and a zero means you have an extremely unfavorable impression, please indicate whether you have a favorable or unfavorable impression of Moderna.

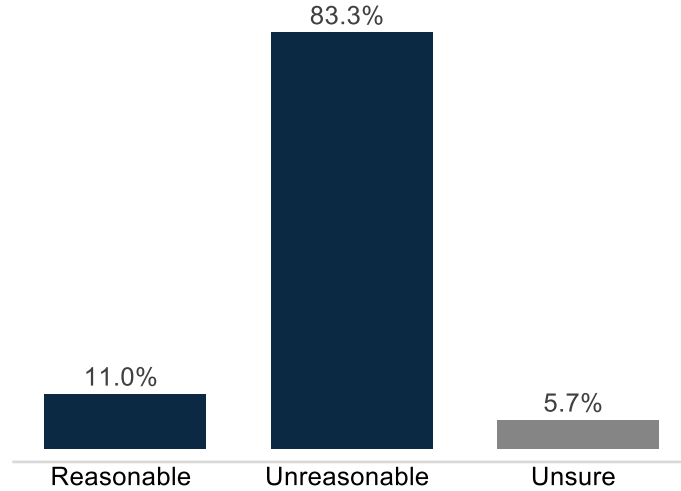
Image: Johnson & Johnson



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwht Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Very unfavorable	23%	17%	33%	13%	14%	26%	18%	20%	21%	20%	20%	21%	22%	18%	35%	22%	16%	15%	19%	38%	30%	31%	27%	17%	19%
Somewhat unfavorable	21%	18%	24%	17%	18%	22%	19%	20%	21%	17%	22%	20%	19%	22%	19%	22%	18%	21%	20%	16%	16%	28%	11%	24%	19%
Somewhat favorable	35%	34%	29%	36%	37%	30%	33%	39%	33%	35%	30%	35%	34%	34%	26%	32%	37%	36%	34%	27%	27%	18%	35%	33%	36%
Very favorable	15%	21%	11%	27%	24%	17%	21%	14%	17%	20%	19%	20%	18%	21%	15%	17%	21%	23%	20%	15%	11%	19%	18%	17%	20%
0	8%	3%	8%	2%	2%	6%	5%	6%	4%	6%	4%	5%	5%	5%	7%	7%	3%	3%	4%	11%	9%	2%	8%	6%	4%
1	15%	13%	25%	11%	12%	20%	13%	15%	16%	14%	16%	16%	17%	13%	28%	15%	13%	12%	14%	28%	21%	29%	18%	11%	15%
2	7%	7%	9%	5%	9%	6%	6%	10%	4%	4%	8%	9%	7%	6%	7%	9%	5%	7%	7%	4%	10%	7%	7%	8%	7%
3	7%	4%	9%	6%	4%	9%	6%	4%	10%	6%	6%	5%	6%	8%	6%	7%	7%	5%	7%	5%	0%	9%	4%	8%	6%
4	7%	7%	6%	5%	5%	6%	8%	6%	6%	7%	9%	5%	6%	7%	5%	6%	6%	9%	7%	7%	6%	11%	1%	8%	7%
5	16%	13%	16%	14%	18%	13%	13%	17%	17%	14%	14%	14%	15%	13%	13%	13%	18%	13%	15%	21%	16%	10%	18%	16%	15%
6	7%	10%	7%	12%	10%	10%	10%	8%	7%	13%	7%	10%	9%	10%	8%	10%	10%	7%	10%	3%	11%	5%	8%	10%	10%
7	11%	11%	6%	10%	9%	7%	10%	14%	10%	8%	9%	11%	10%	9%	4%	10%	9%	15%	10%	2%	0%	3%	10%	7%	11%
8	8%	7%	5%	11%	11%	7%	9%	4%	8%	9%	7%	7%	7%	10%	5%	5%	9%	13%	8%	6%	5%	9%	6%	6%	8%
9	1%	6%	1%	9%	7%	4%	3%	6%	2%	4%	5%	6%	4%	5%	3%	6%	5%	4%	5%	2%	6%	3%	4%	3%	5%
10	6%	8%	5%	7%	6%	6%	9%	4%	7%	7%	7%	6%	7%	5%	6%	7%	7%	6%	7%	6%	0%	6%	8%	8%	6%
Never heard of	5%	10%	4%	8%	7%	5%	9%	6%	9%	7%	9%	5%	8%	6%	6%	7%	8%	6%	6%	4%	17%	5%	9%	9%	6%

Using a zero-to-ten scale, where a ten means you have an extremely favorable impression and a zero means you have an extremely unfavorable impression, please indicate whether you have a favorable or unfavorable impression of Johnson & Johnson.

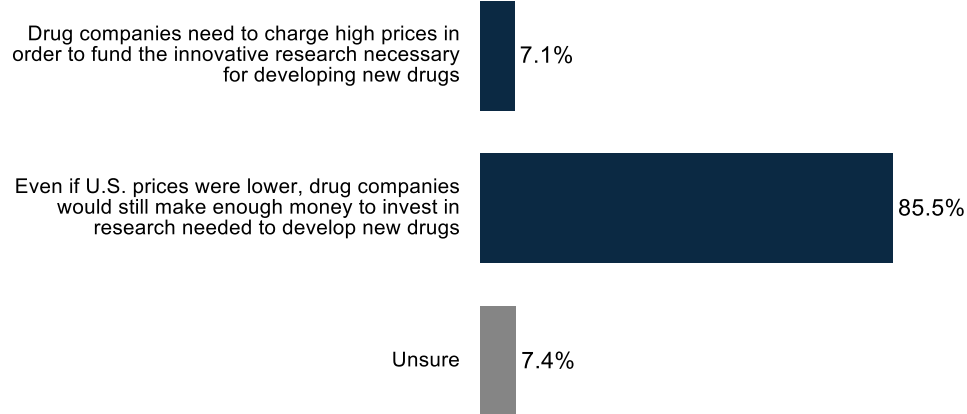
Cost of Drugs Initial



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwht Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Reasonable	6%	10%	12%	16%	16%	12%	8%	8%	8%	13%	10%	12%	11%	10%	13%	10%	10%	13%	10%	20%	11%	11%	12%	15%	10%
Unreasonable	91%	84%	81%	78%	76%	82%	87%	88%	85%	79%	83%	85%	83%	83%	83%	85%	85%	79%	84%	80%	84%	82%	83%	83%	84%
Unsure	3%	6%	7%	6%	8%	6%	5%	4%	6%	8%	7%	3%	5%	7%	5%	5%	6%	8%	6%	0%	5%	7%	4%	2%	7%

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

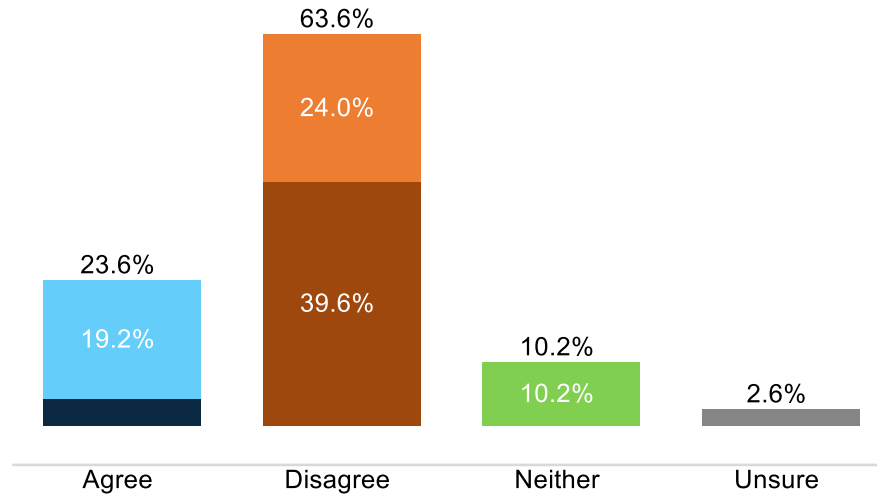
Drug Company Prices Initial



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwhit Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Drug companies need to charge high prices in order to fund the innovative research necessary for developing new drugs	4%	5%	9%	10%	16%	6%	3%	7%	2%	10%	11%	7%	6%	10%	7%	6%	7%	11%	7%	13%	11%	5%	8%	5%	8%
Even if U.S. prices were lower, drug companies would still make enough money to invest in research needed to develop new drugs	90%	87%	86%	80%	77%	87%	89%	86%	87%	81%	82%	89%	86%	85%	85%	85%	88%	82%	86%	78%	89%	89%	87%	89%	84%
Unsure	6%	8%	5%	10%	7%	7%	7%	7%	11%	9%	7%	5%	8%	5%	8%	9%	5%	7%	7%	9%	0%	6%	5%	6%	9%

Which of the following do you agree with more?

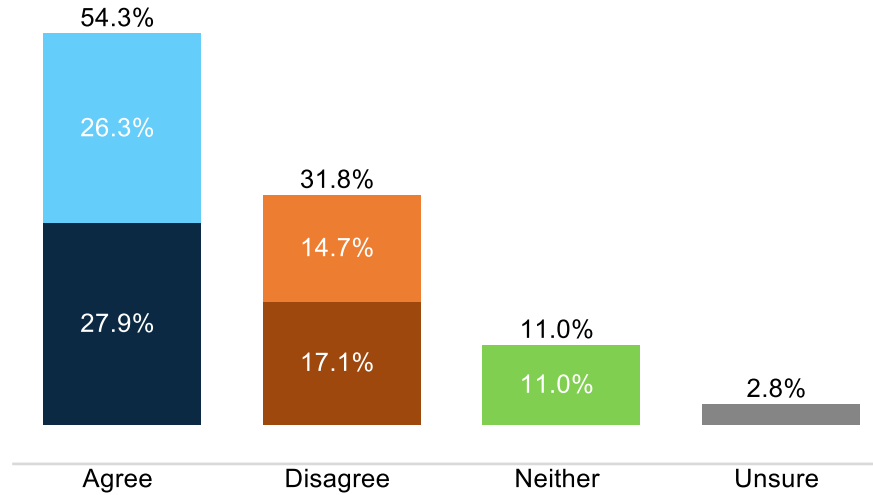
Understand Cost Initial



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwrht Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Agree Total	16%	22%	26%	29%	34%	24%	17%	24%	21%	25%	26%	23%	24%	22%	24%	22%	27%	24%	23%	34%	33%	28%	24%	21%	24%
Disagree Total	71%	69%	59%	55%	53%	60%	72%	65%	65%	59%	60%	67%	63%	66%	67%	63%	63%	62%	64%	59%	56%	48%	66%	66%	64%
Strongly agree	2%	3%	4%	8%	9%	5%	3%	1%	3%	5%	5%	5%	5%	4%	7%	3%	5%	4%	4%	13%	5%	5%	5%	4%	4%
Somewhat agree	14%	19%	22%	21%	25%	19%	14%	24%	18%	21%	21%	18%	19%	19%	16%	19%	23%	20%	19%	21%	28%	23%	19%	16%	19%
Neither agree nor disagree	10%	7%	11%	13%	11%	12%	9%	8%	11%	11%	11%	9%	11%	9%	8%	12%	8%	11%	10%	7%	6%	17%	9%	10%	10%
Somewhat disagree	23%	23%	25%	25%	29%	23%	22%	26%	21%	18%	33%	25%	23%	25%	19%	24%	27%	24%	26%	9%	25%	6%	27%	23%	25%
Strongly disagree	48%	47%	34%	30%	24%	37%	50%	40%	44%	41%	28%	42%	39%	40%	48%	40%	35%	38%	39%	50%	30%	42%	39%	43%	39%
Unsure	2%	2%	3%	3%	2%	4%	2%	2%	2%	4%	3%	1%	3%	3%	2%	2%	2%	3%	2%	0%	5%	6%	1%	4%	2%

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.

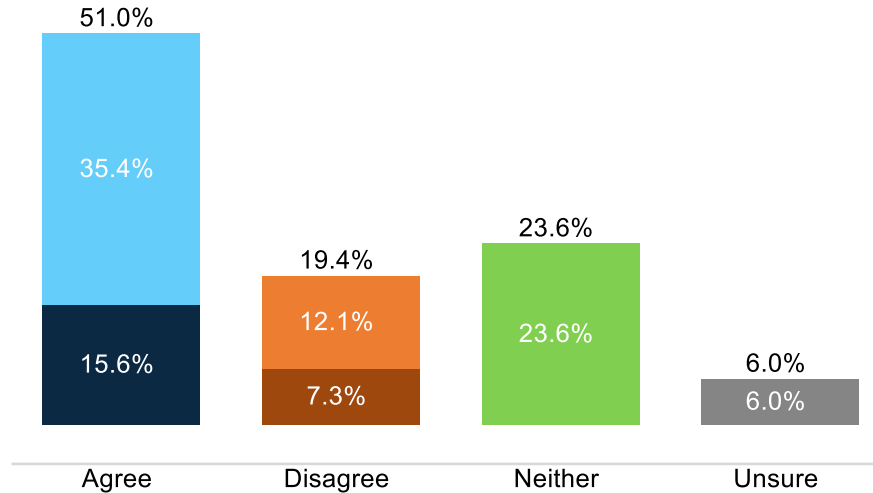
Prices too High Initial



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwht Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Agree Total	65%	62%	45%	46%	43%	48%	66%	59%	58%	55%	55%	52%	53%	56%	48%	49%	57%	66%	55%	51%	73%	54%	57%	60%	52%
Disagree Total	24%	25%	38%	40%	44%	36%	23%	27%	29%	32%	31%	34%	32%	31%	40%	37%	28%	22%	31%	45%	27%	29%	28%	26%	34%
Strongly agree	39%	32%	20%	21%	19%	22%	38%	29%	29%	28%	30%	27%	26%	32%	31%	23%	24%	40%	28%	30%	49%	29%	34%	34%	25%
Somewhat agree	26%	30%	24%	24%	24%	26%	28%	30%	29%	26%	25%	25%	27%	24%	17%	26%	34%	25%	27%	21%	25%	25%	23%	26%	27%
Neither agree nor disagree	10%	10%	12%	12%	11%	12%	9%	12%	10%	8%	12%	13%	12%	9%	9%	11%	14%	8%	12%	3%	0%	7%	13%	13%	11%
Somewhat disagree	14%	12%	17%	17%	18%	17%	11%	16%	14%	15%	13%	15%	16%	12%	15%	19%	14%	8%	15%	20%	12%	12%	15%	13%	16%
Strongly disagree	10%	13%	21%	24%	26%	19%	12%	11%	15%	17%	17%	18%	16%	19%	25%	18%	13%	14%	16%	25%	14%	17%	14%	13%	19%
Unsure	1%	3%	5%	2%	2%	4%	2%	2%	3%	5%	2%	2%	3%	3%	3%	1%	4%	3%	2%	0%	10%	2%	1%	3%	

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.

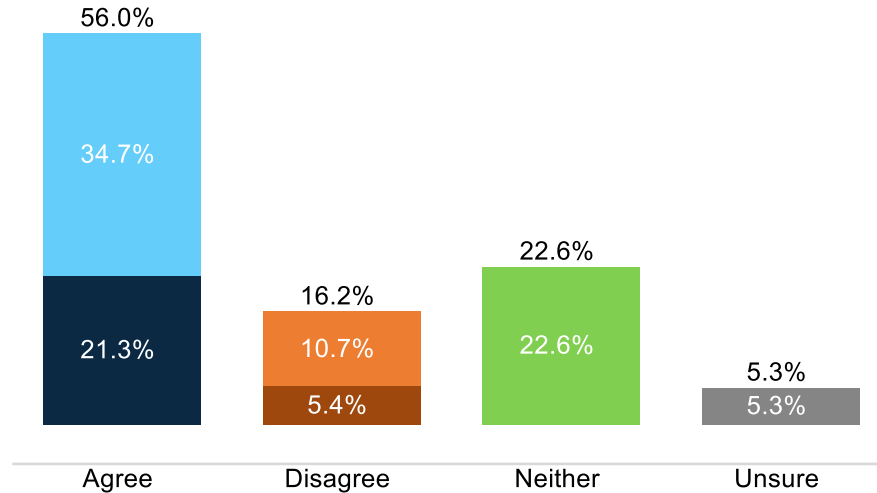
Age of Discovery Initial



	F <35	F 35+	M <35	M 35+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwht Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Agree Total	53%	43%	52%	57%	55%	56%	42%	58%	55%	51%	58%	46%	52%	49%	49%	53%	51%	55%	51%	59%	64%	41%	56%	55%	50%
Disagree Total	18%	22%	22%	16%	20%	17%	21%	18%	15%	19%	17%	23%	19%	21%	24%	20%	19%	17%	18%	15%	25%	13%	19%	19%	20%
Strongly agree	15%	14%	15%	19%	22%	14%	13%	16%	14%	17%	23%	13%	15%	16%	14%	16%	15%	21%	15%	20%	27%	16%	18%	14%	15%
Somewhat agree	38%	29%	37%	39%	33%	42%	28%	42%	41%	34%	35%	34%	37%	32%	35%	37%	36%	34%	36%	40%	37%	25%	38%	41%	34%
Neither agree nor disagree	24%	29%	18%	23%	21%	20%	30%	21%	25%	23%	20%	25%	23%	26%	19%	22%	26%	23%	25%	19%	11%	28%	21%	19%	25%
Somewhat disagree	13%	13%	12%	10%	13%	9%	15%	10%	9%	13%	10%	14%	12%	12%	14%	13%	12%	10%	12%	2%	10%	9%	11%	11%	13%
Strongly disagree	5%	8%	9%	6%	7%	8%	6%	8%	7%	7%	7%	8%	7%	8%	11%	6%	7%	7%	6%	13%	15%	3%	9%	8%	7%
Unsure	5%	7%	8%	4%	3%	7%	8%	3%	4%	7%	5%	6%	6%	5%	7%	5%	5%	5%	6%	7%	0%	18%	4%	7%	5%

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.

More Drug and Treatment Options Initial



	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwht Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Agree Total	57%	55%	51%	61%	60%	55%	53%	63%	56%	55%	56%	56%	56%	56%	49%	58%	57%	62%	56%	56%	68%	49%	64%	59%	54%
Disagree Total	13%	15%	20%	16%	16%	19%	14%	13%	13%	18%	16%	17%	16%	15%	24%	15%	17%	9%	15%	17%	27%	7%	16%	16%	18%
Strongly agree	23%	16%	23%	24%	28%	21%	17%	23%	18%	20%	23%	23%	22%	19%	22%	22%	21%	22%	20%	35%	43%	26%	23%	18%	21%
Somewhat agree	34%	39%	28%	37%	32%	34%	36%	40%	38%	35%	33%	34%	37%	28%	35%	36%	40%	36%	36%	21%	25%	23%	41%	40%	33%
Neither agree nor disagree	26%	24%	23%	18%	17%	22%	27%	22%	25%	20%	23%	23%	22%	21%	22%	23%	23%	24%	23%	5%	29%	16%	24%	23%	
Somewhat disagree	9%	8%	14%	12%	14%	12%	10%	6%	8%	14%	11%	10%	11%	9%	13%	10%	13%	5%	11%	9%	15%	4%	13%	11%	11%
Strongly disagree	4%	7%	6%	4%	3%	6%	5%	7%	5%	4%	5%	6%	5%	6%	11%	4%	4%	4%	4%	7%	11%	3%	3%	5%	6%
Unsure	4%	5%	7%	5%	6%	5%	6%	2%	6%	7%	4%	4%	5%	6%	6%	3%	7%	5%	4%	0%	15%	4%	2%	6%	

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.

Messages

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.*

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.*

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.*

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.*

Maintain Access: *During an era of global uncertainty, it will be 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.: *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.*

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.*

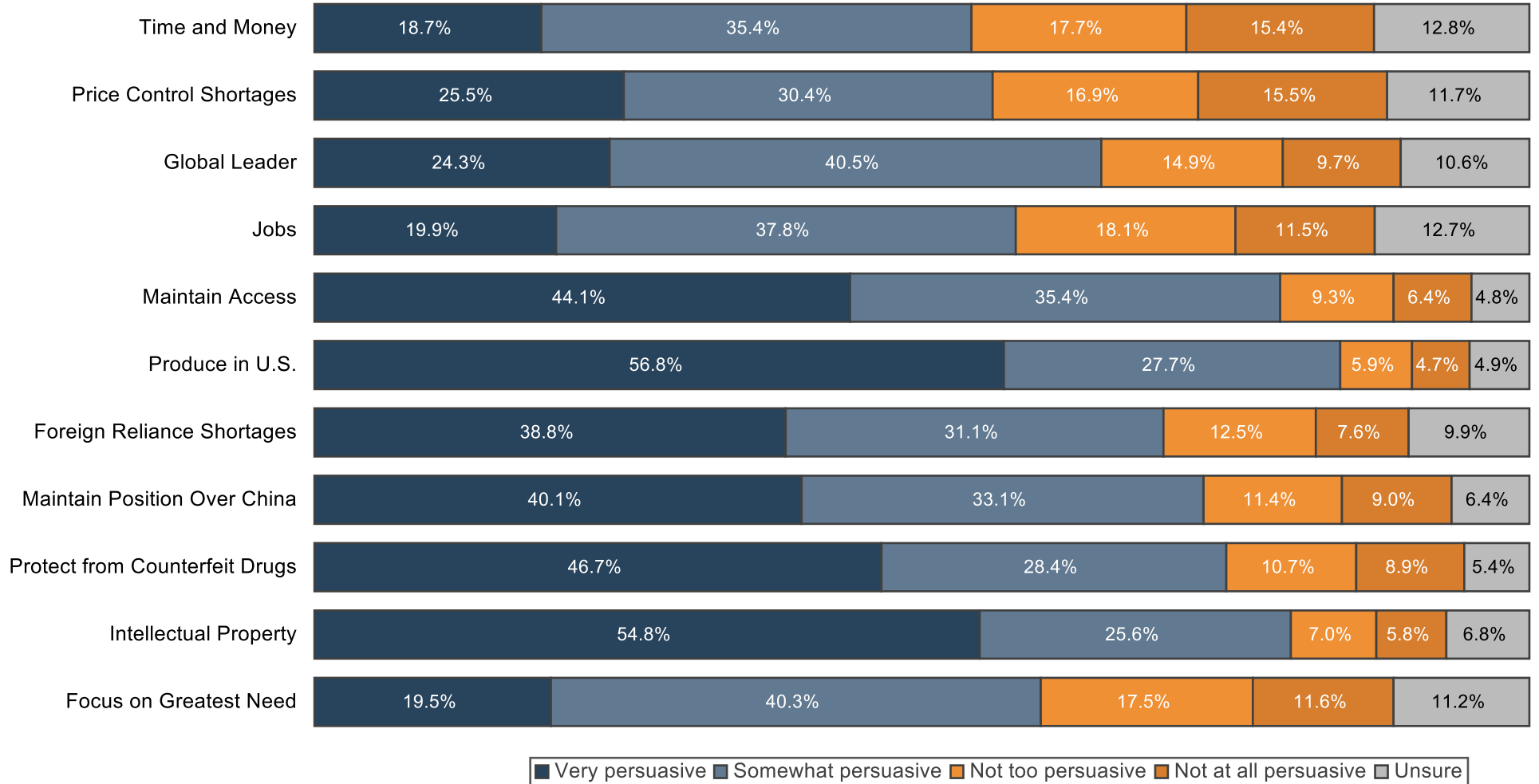
Maintain Position Over China: *China has announced a 10-year strategic plan to surpass the United States in biotech, so our industry must do whatever it can to maintain its position as an innovative industry leader.*

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. 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.*

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.*

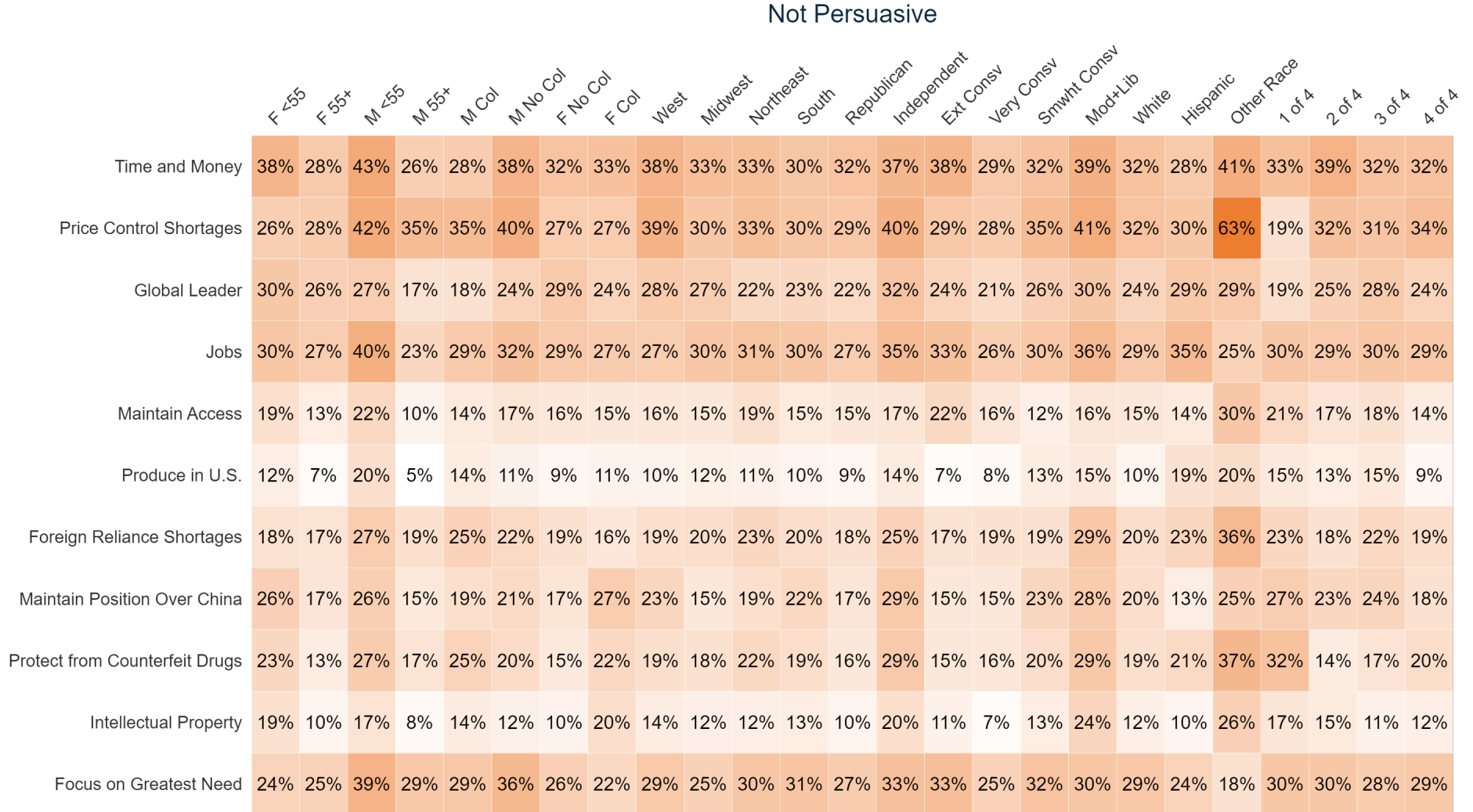
Messages



Messages Heatmap - Persuasive

	Persuasive																								
	F <55	F 55+	M <55	M 55+	M Col	M No Col	F No Col	F Col	West	Midwest	Northeast	South	Republican	Independent	Ext Conserv	Very Conserv	Smwhit Conserv	Mod+Lib	White	Hispanic	Other Race	1 of 4	2 of 4	3 of 4	4 of 4
Time and Money	49%	53%	50%	63%	68%	51%	50%	57%	48%	51%	59%	57%	56%	50%	53%	59%	57%	46%	56%	59%	55%	51%	51%	57%	55%
Price Control Shortages	57%	57%	50%	58%	59%	52%	56%	61%	47%	58%	60%	57%	60%	47%	61%	59%	56%	48%	57%	59%	37%	58%	57%	58%	55%
Global Leader	58%	60%	65%	75%	78%	66%	56%	66%	59%	61%	69%	68%	68%	57%	67%	69%	67%	56%	66%	69%	67%	60%	66%	66%	65%
Jobs	56%	55%	51%	67%	65%	57%	53%	61%	56%	57%	60%	58%	60%	52%	57%	61%	61%	50%	59%	56%	66%	45%	63%	57%	58%
Maintain Access	74%	82%	74%	86%	84%	78%	77%	81%	77%	78%	78%	82%	80%	78%	74%	79%	86%	77%	81%	81%	70%	67%	81%	76%	82%
Produce in U.S.	80%	88%	77%	91%	84%	85%	83%	87%	85%	81%	87%	85%	86%	81%	87%	89%	83%	79%	85%	77%	80%	74%	80%	82%	87%
Foreign Reliance Shortages	72%	70%	66%	71%	70%	69%	69%	74%	67%	72%	70%	70%	72%	66%	76%	71%	75%	58%	71%	68%	64%	60%	71%	68%	71%
Maintain Position Over China	64%	75%	70%	80%	79%	74%	74%	66%	70%	76%	78%	71%	77%	65%	78%	80%	72%	64%	74%	83%	75%	60%	70%	70%	76%
Protect from Counterfeit Drugs	69%	81%	69%	78%	73%	74%	78%	73%	76%	74%	75%	75%	79%	66%	81%	80%	75%	64%	76%	74%	63%	59%	79%	81%	75%
Intellectual Property	70%	84%	76%	87%	82%	82%	81%	73%	77%	80%	83%	81%	83%	74%	84%	88%	83%	64%	81%	88%	70%	69%	79%	79%	82%
Focus on Greatest Need	61%	62%	52%	63%	65%	55%	60%	66%	57%	62%	64%	59%	62%	55%	56%	65%	60%	57%	61%	67%	82%	56%	61%	60%	60%

Messages Heatmap - Not Persuasive



How to Read a Cygnal Message Map

Effectiveness (X Axis)

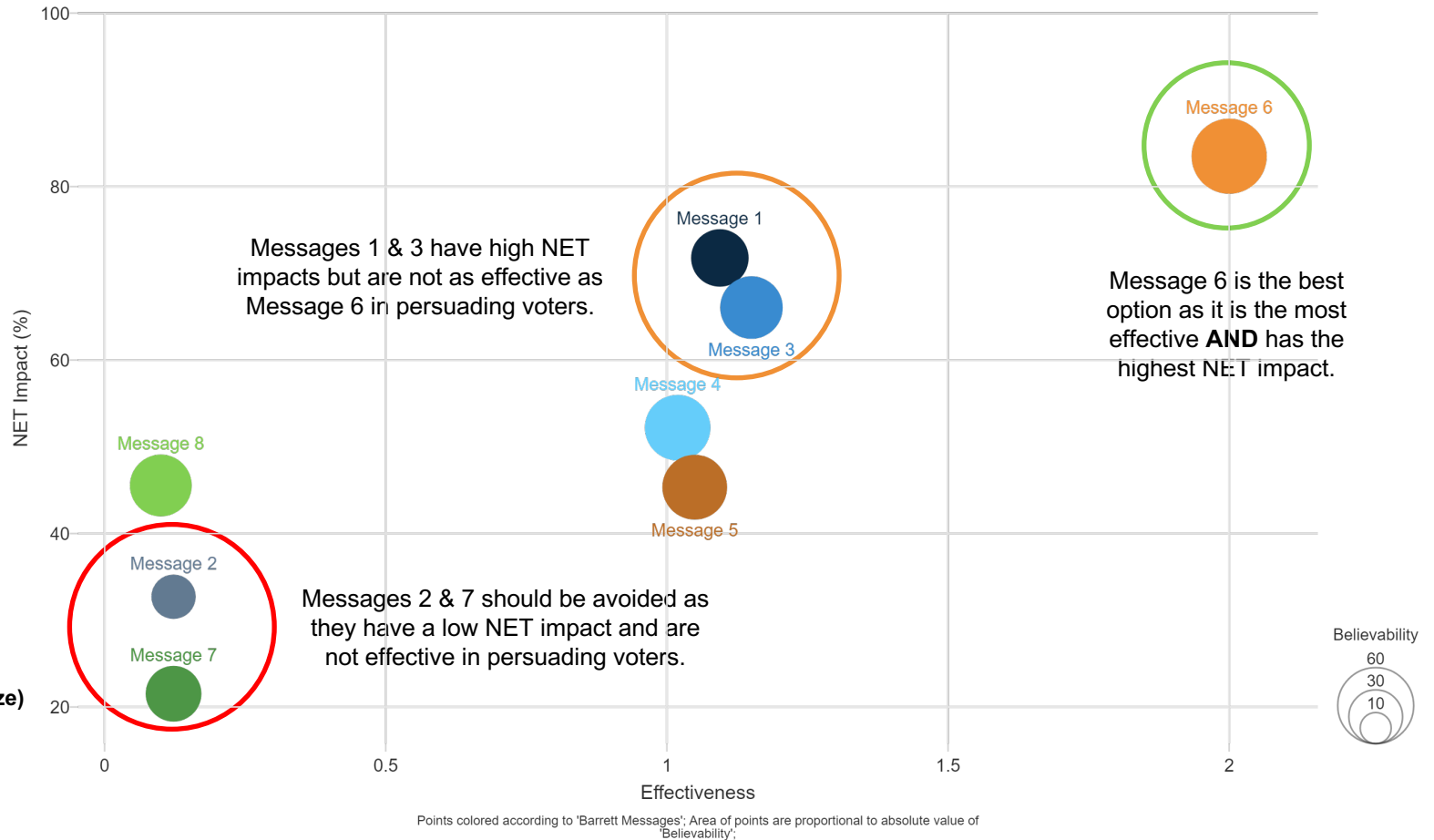
The horizontal position of each message indicates the message's *persuasion power* – the **most important** function. Messages positioned **furthest to the right** are the **most effective in changing** a voter's opinion. Pay attention to the **effectiveness scale** at the **bottom** and how messages compare graph-to-graph; standard range is 0 to 2.

Net Impact (Y Axis)

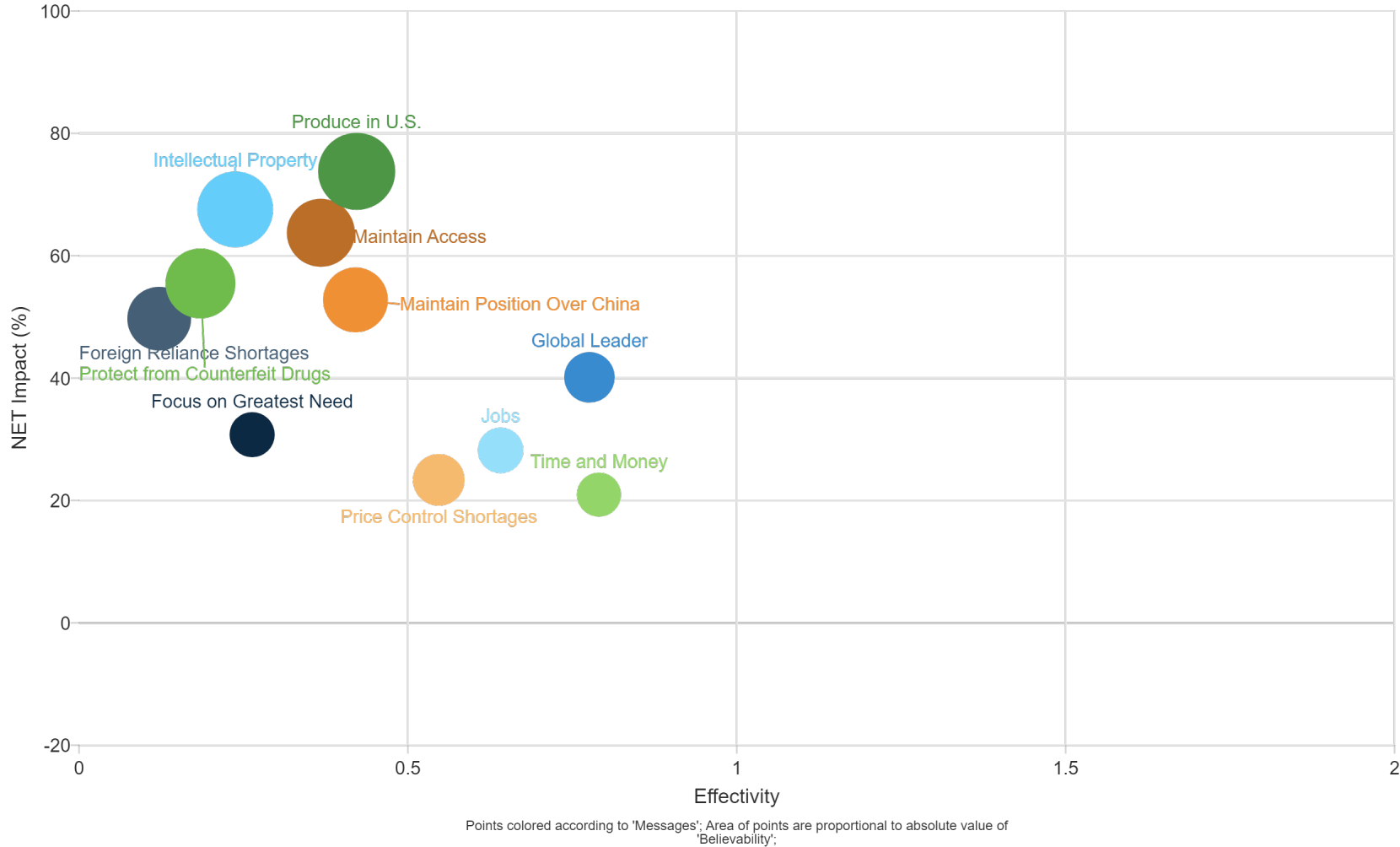
The vertical position of each message indicates the NET impact – or *popularity* – of each message. Messages with **highest position** have the **broadest appeal**. The closer a message is to the **bottom** of Net Impact, the more **drag** it has meaning it can cut against you.

Believability (Bubble Size)

The size of each message bubble reflects the **intensity** of responses (called *believability*). Larger bubbles reflect a high concentration of respondents choosing *much* more/less likely. This is a **comparative tool** for impact but third in importance of the overall graph.



Pro-Understand Cost Message Mapping: Overall



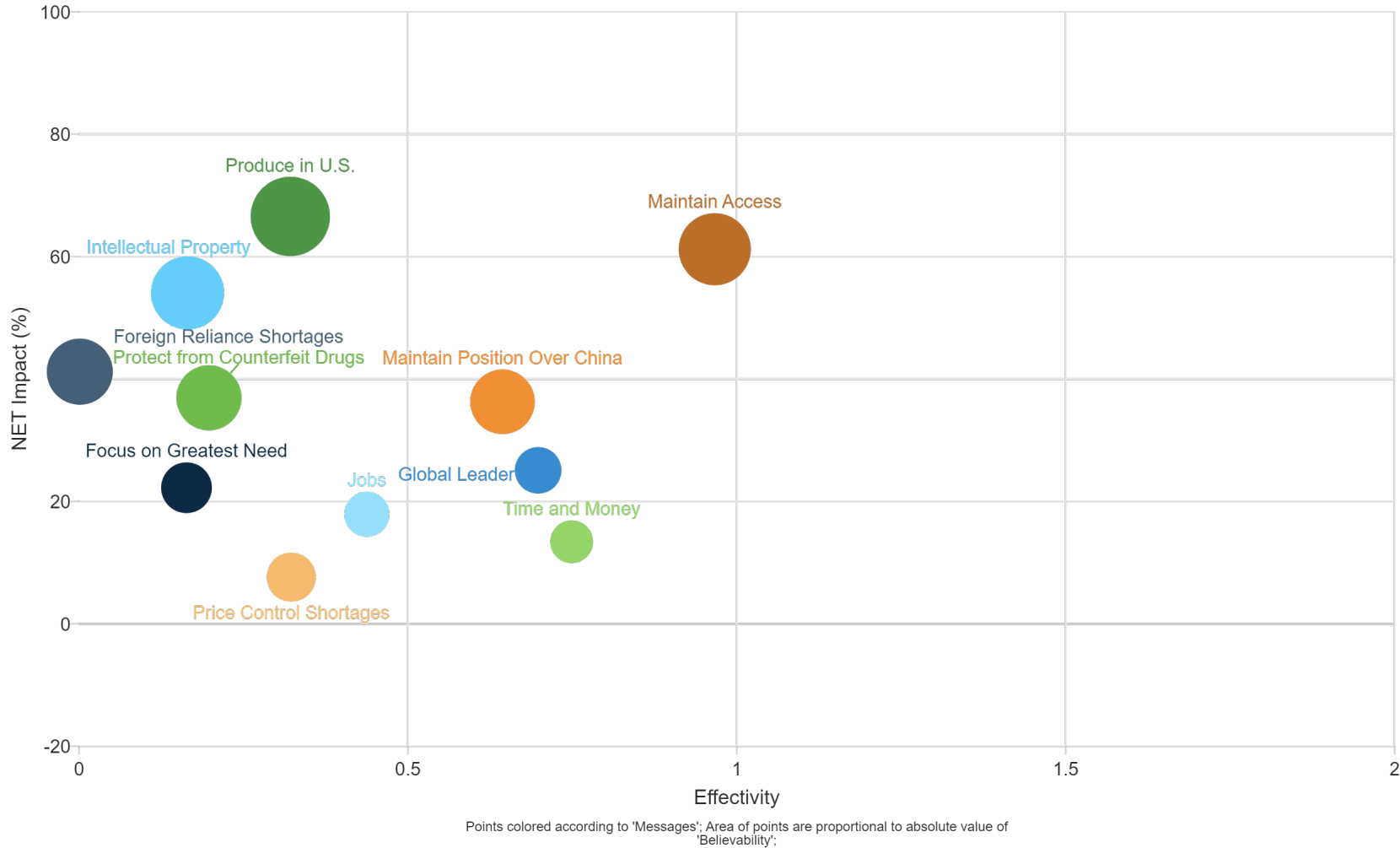
Effectiveness is the coefficient of the message in a logistic regression model with the likelihood of choosing Agree on the informed ballot. NET Impact is the difference of the percentage of likely voters who responded Persuasive and Not persuasive on the messages. Believability is the percentage of likely voters who responded Very persuasive (Not at all persuasive) on the positive (negative) messages. The higher the value of the metric, the more effective/more impactful/more believable the message is.

Pro-Understand Cost Message Mapping: Republicans



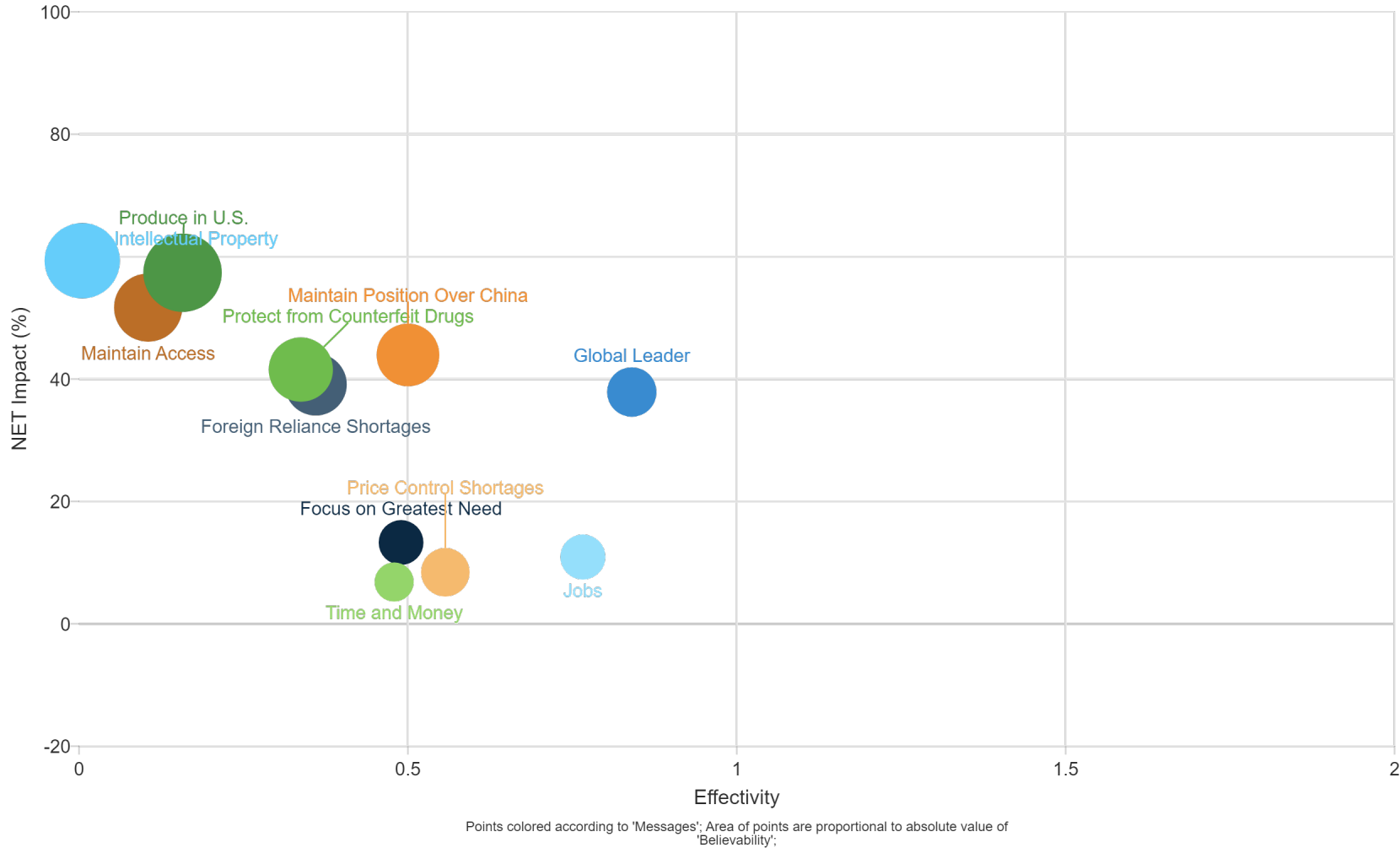
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Pro-Understand Cost Message Mapping: Independents



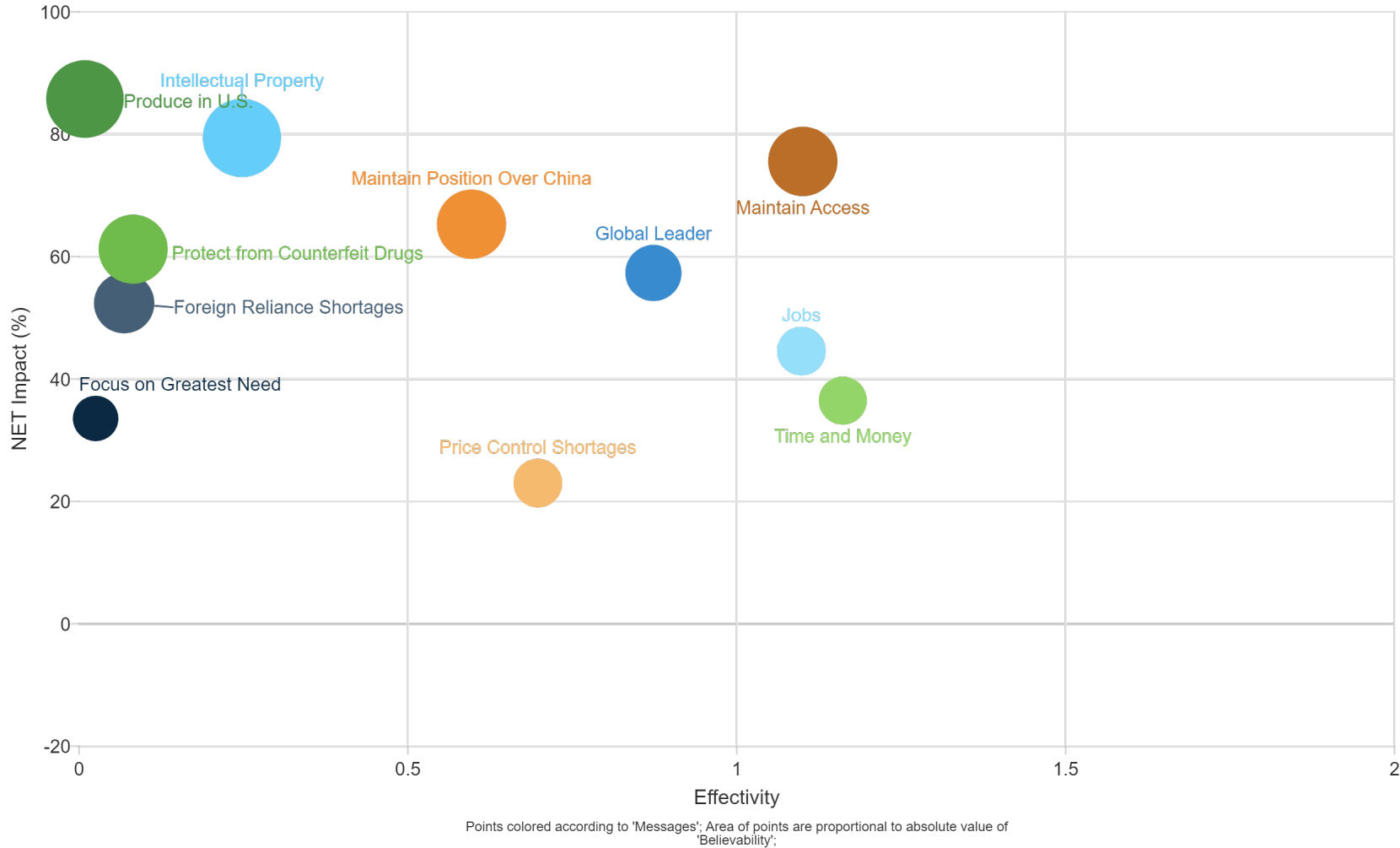
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Pro-Understand Cost Message Mapping: M <55



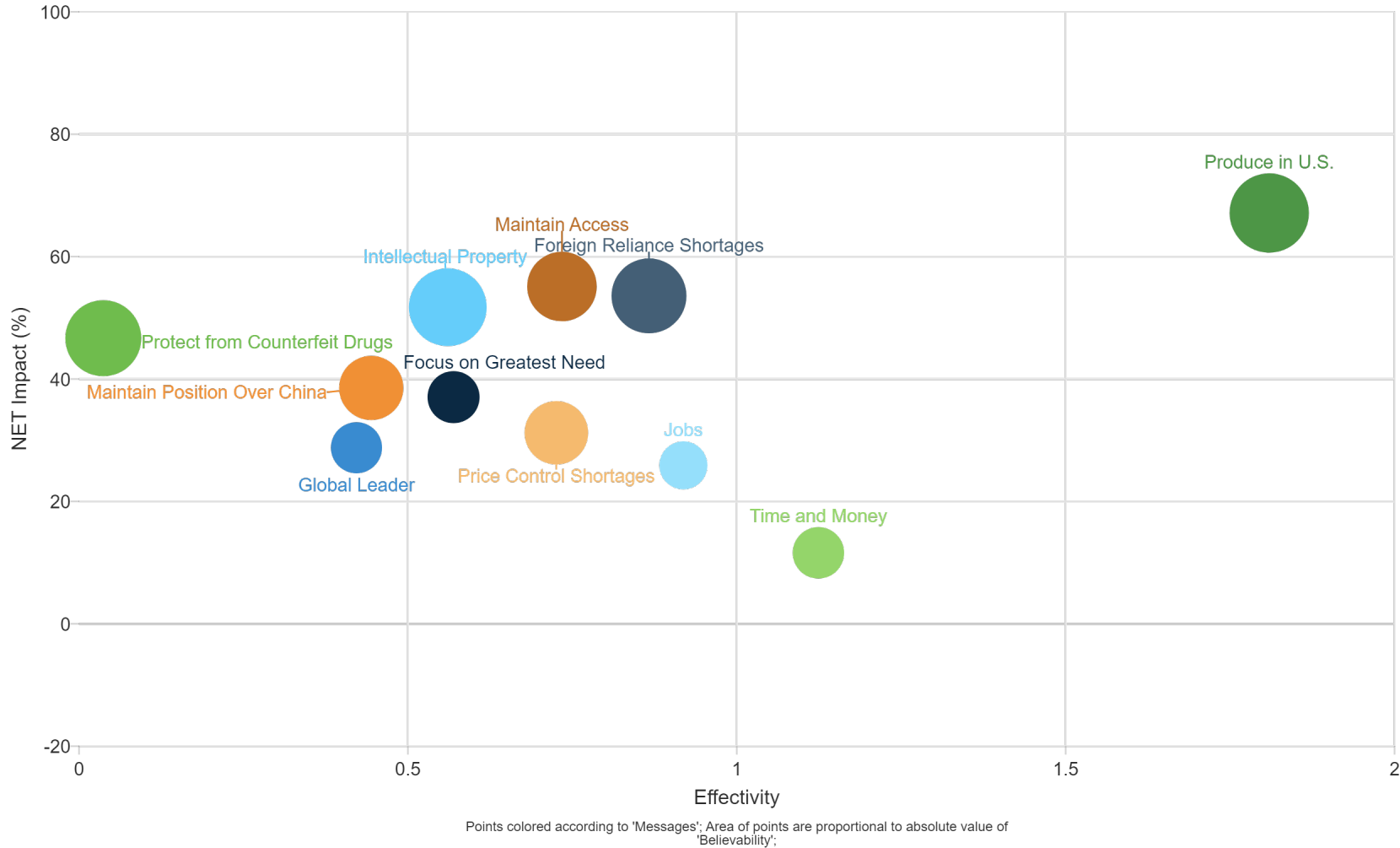
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Pro-Understand Cost Message Mapping: M 55+



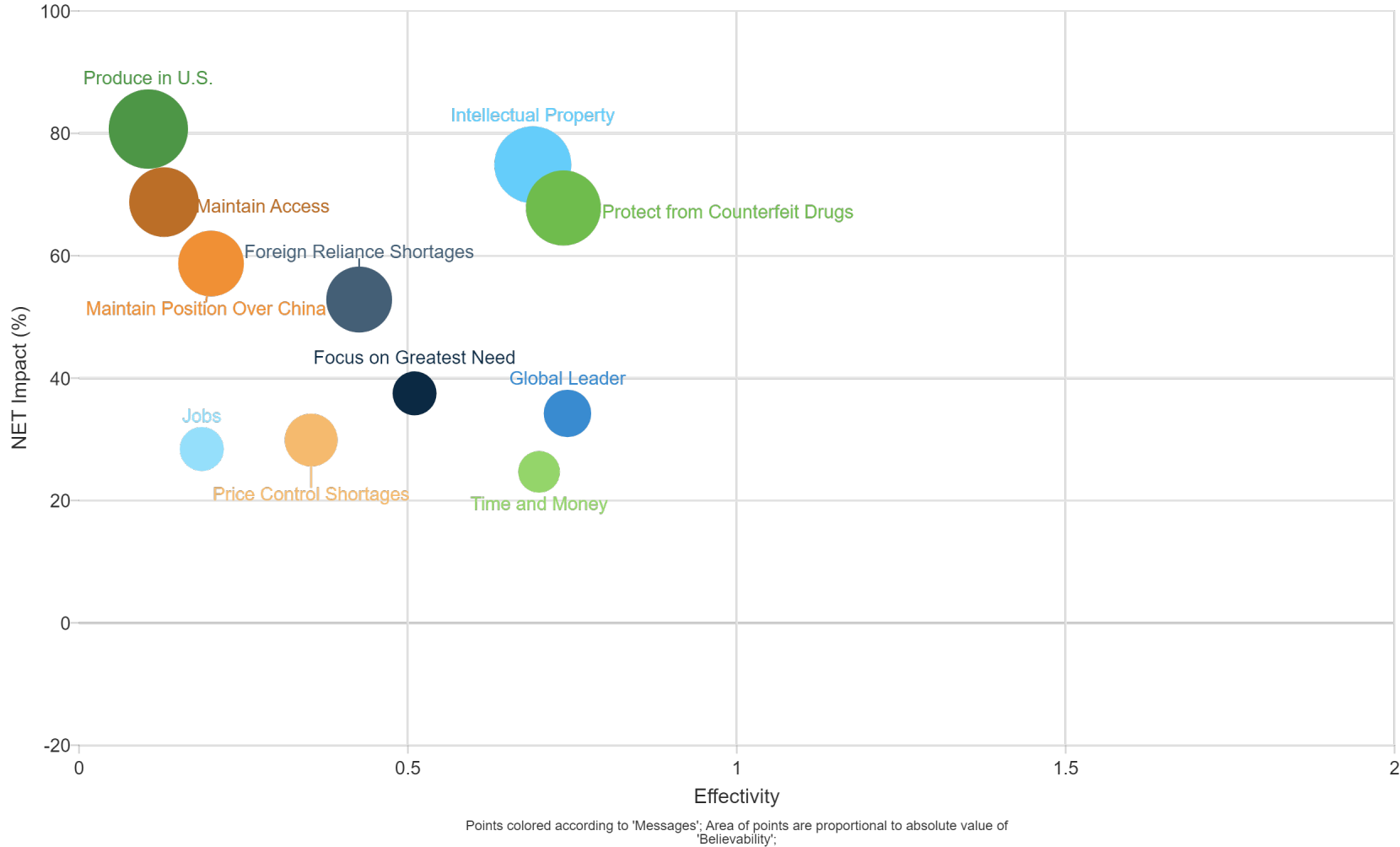
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Pro-Understand Cost Message Mapping: F <55



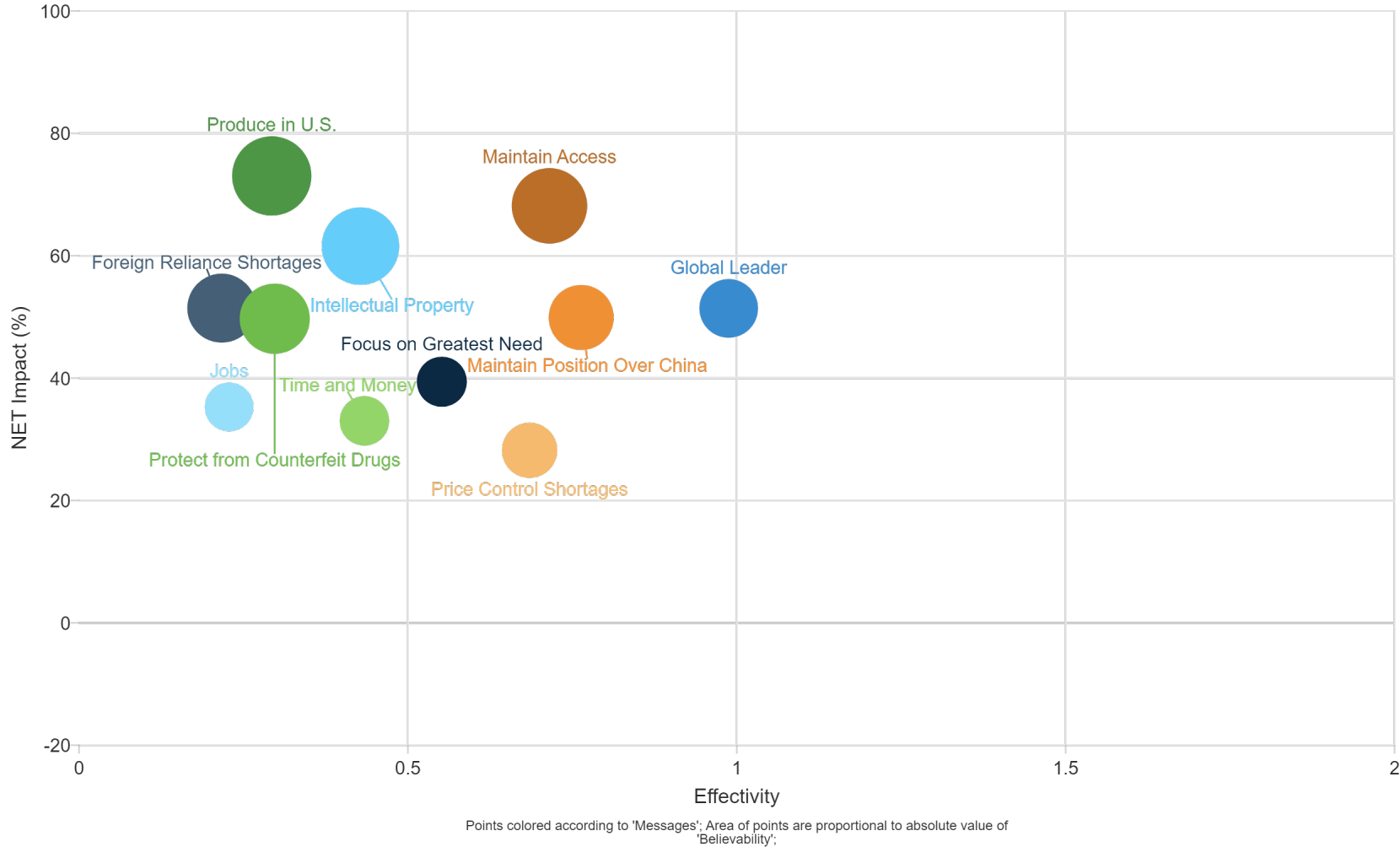
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Pro-Understand Cost Message Mapping: F 55+



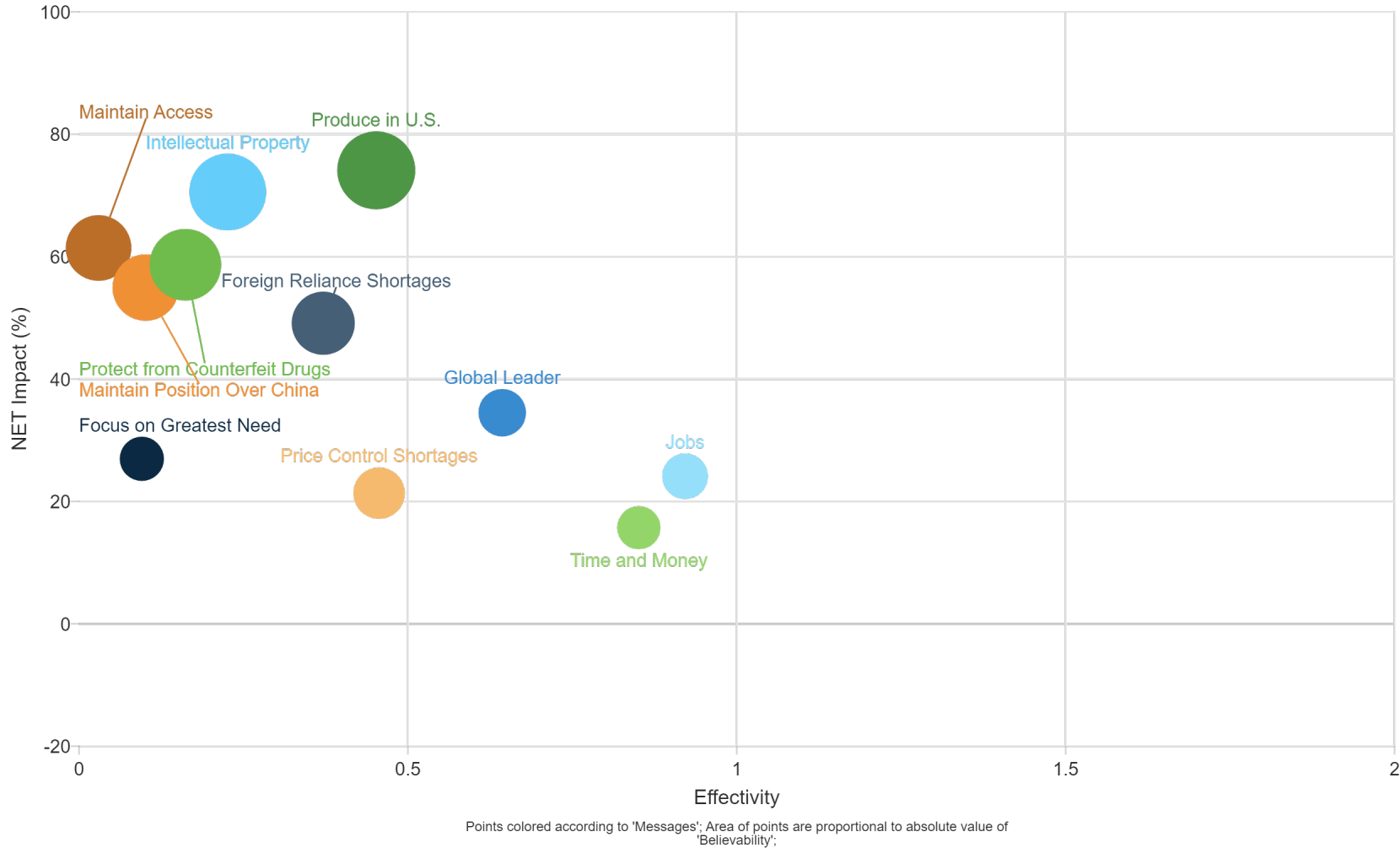
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Pro-Understand Cost Message Mapping: College



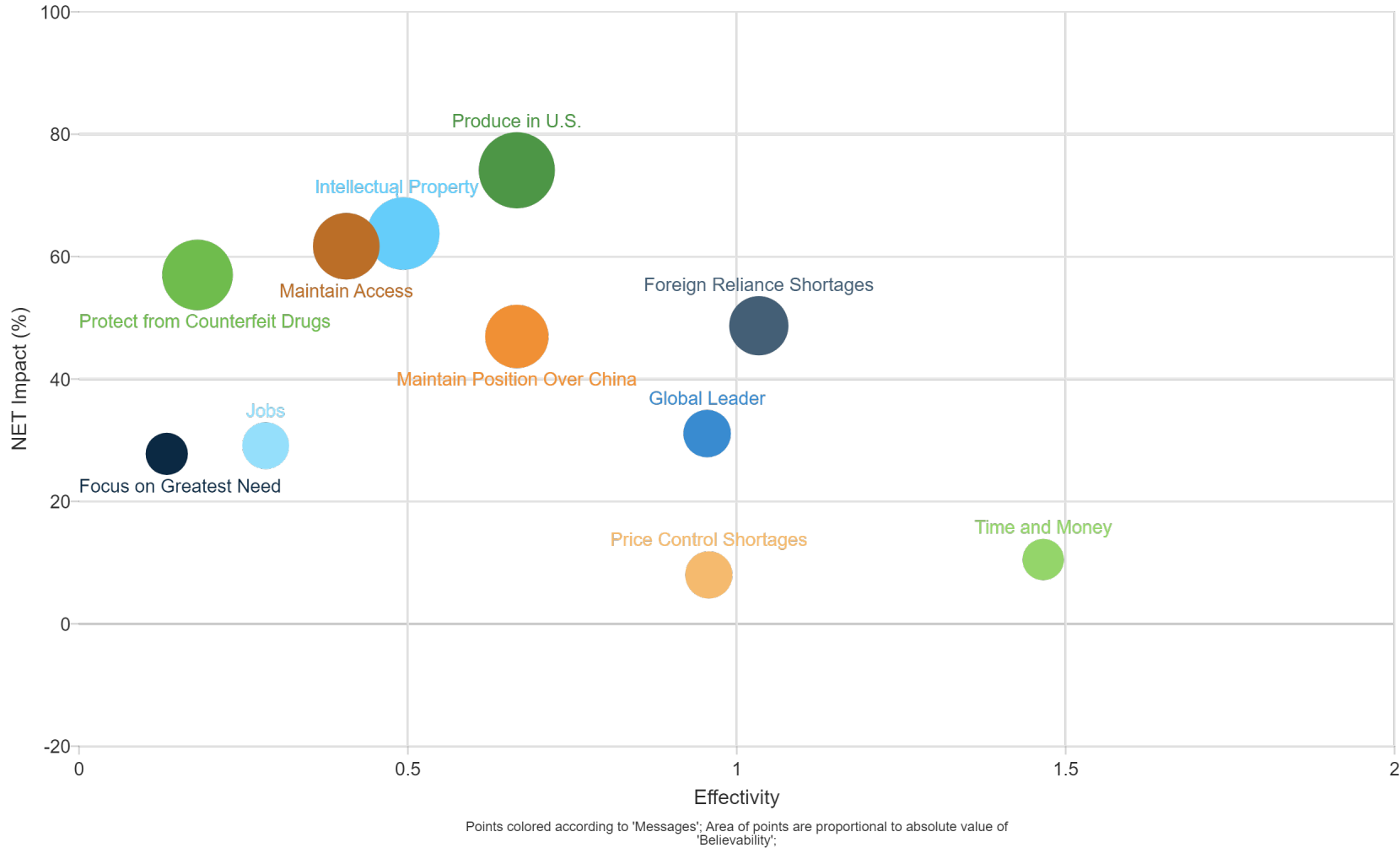
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Pro-Understand Cost Message Mapping: No College



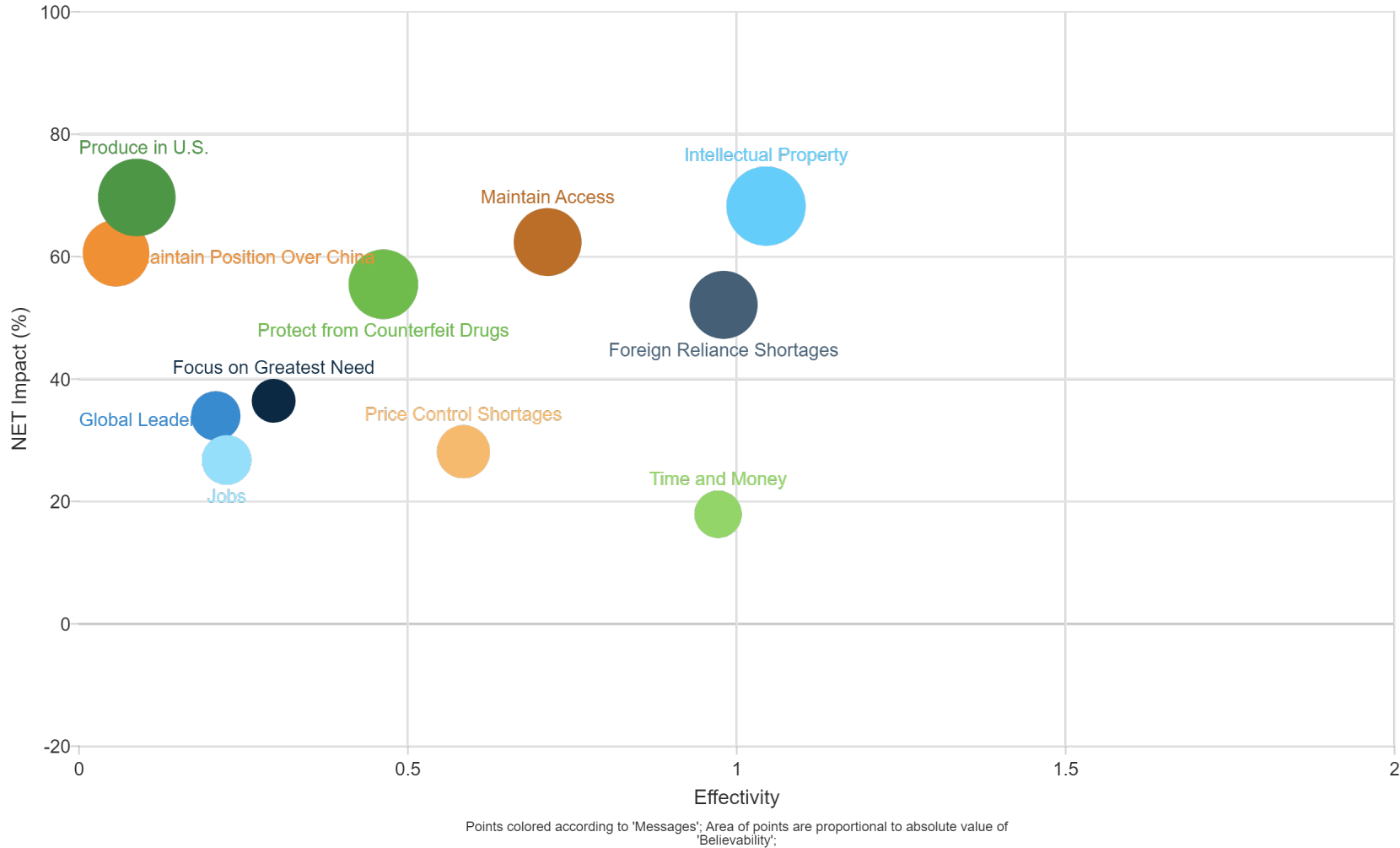
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Pro-Understand Cost Message Mapping: West



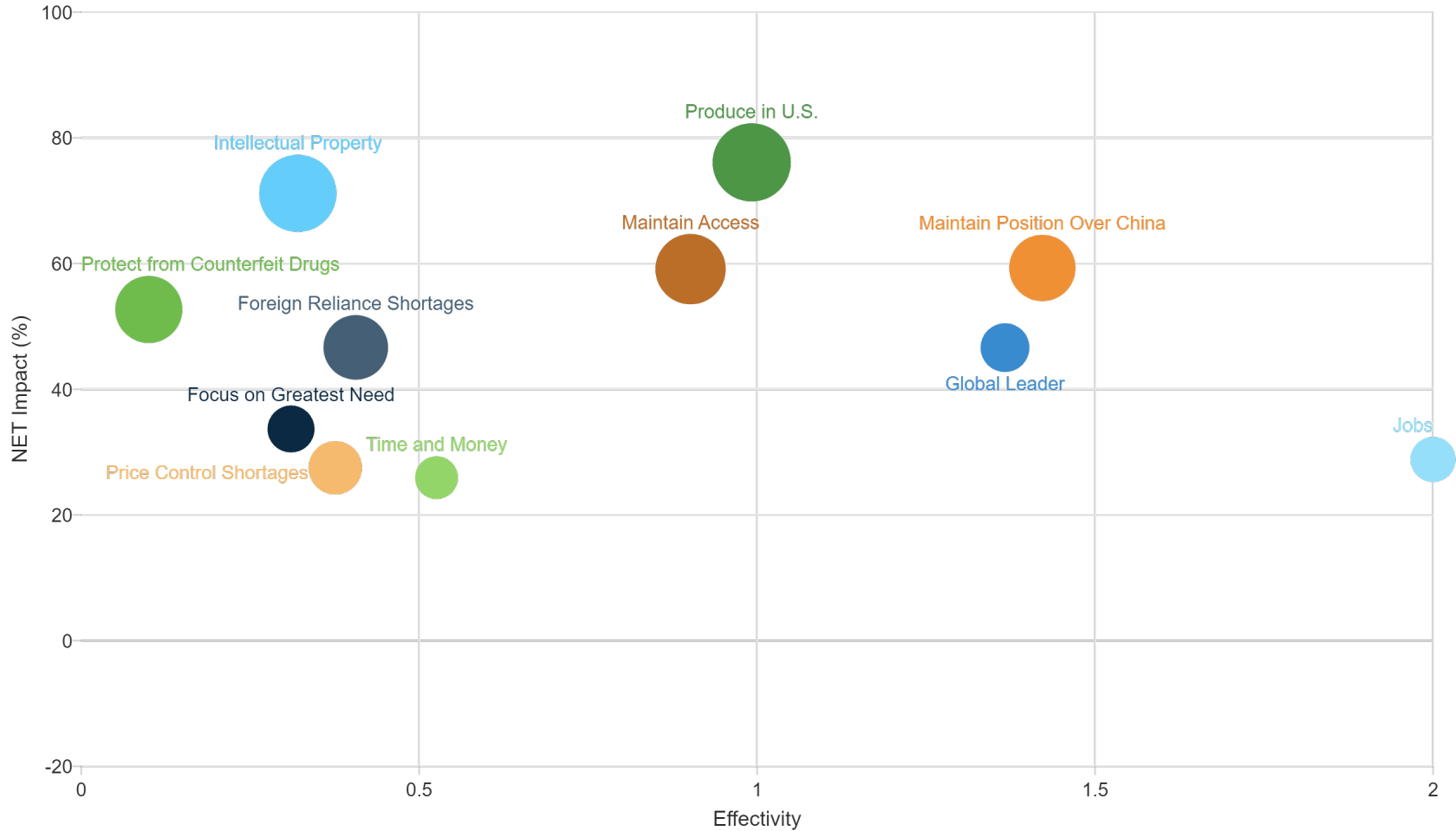
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Pro-Understand Cost Message Mapping: Midwest



Effectiveness is the coefficient of the message in a logistic regression model with the likelihood of choosing Agree on the informed ballot. NET Impact is the difference of the percentage of likely voters who responded Persuasive and Not persuasive on the messages. Believability is the percentage of likely voters who responded Very persuasive (Not at all persuasive) on the positive (negative) messages. The higher the value of the metric, the more effective/more impactful/more believable the message is.

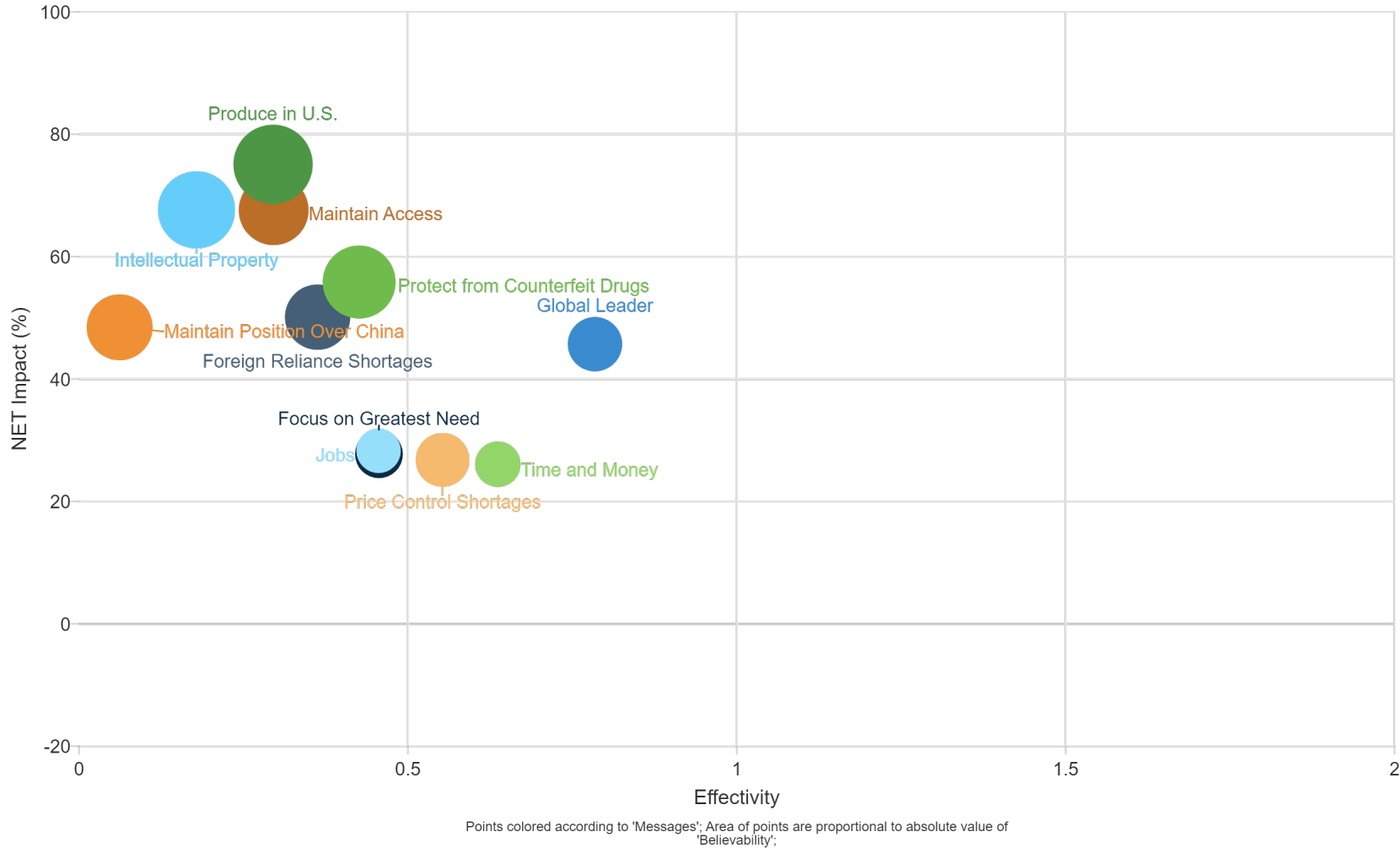
Pro-Understand Cost Message Mapping: Northeast



Points colored according to 'Messages'; Area of points are proportional to absolute value of 'Believability';

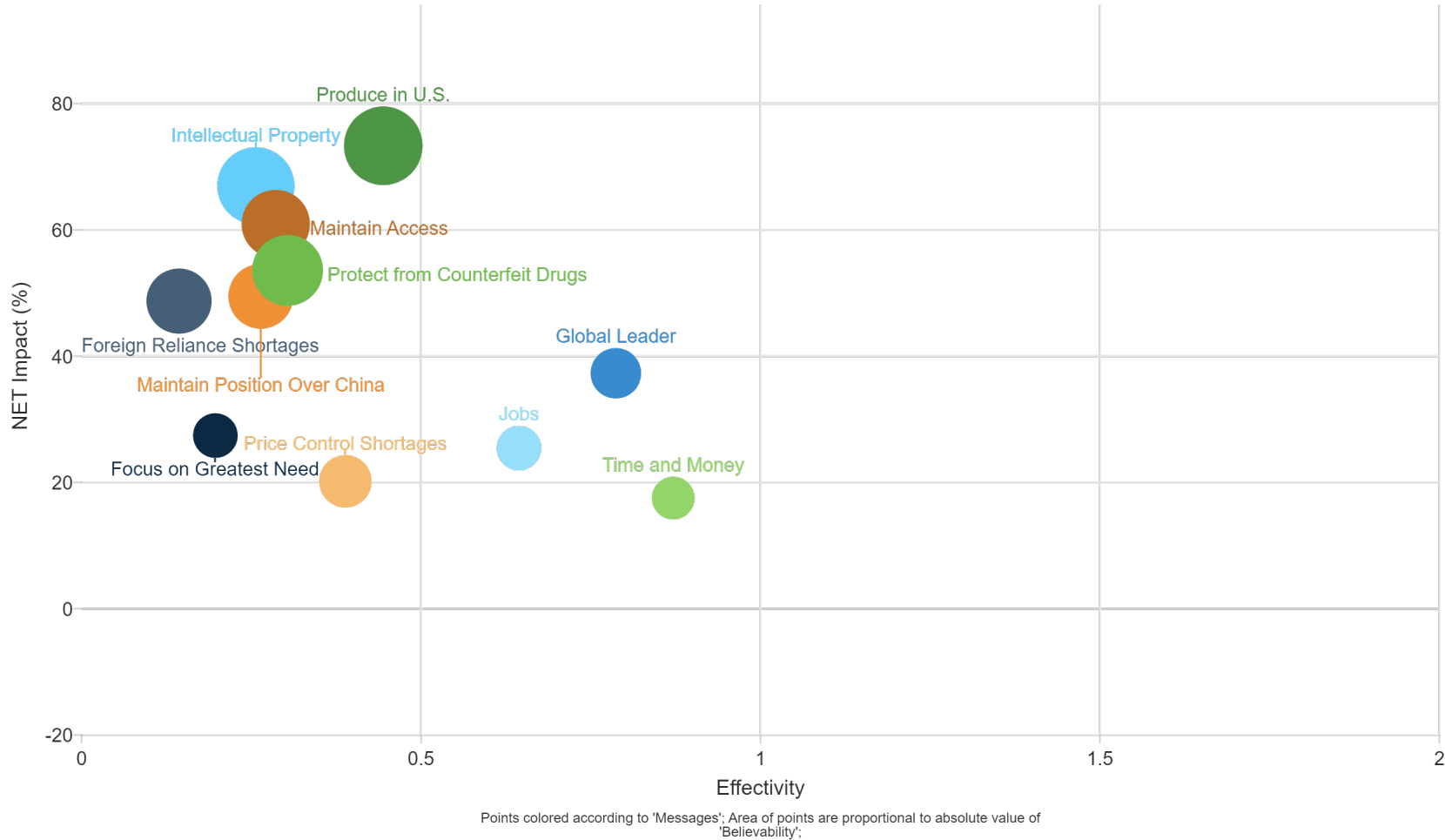
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Pro-Understand Cost Message Mapping: South



Effectiveness is the coefficient of the message in a logistic regression model with the likelihood of choosing Agree on the informed ballot. NET Impact is the difference of the percentage of likely voters who responded Persuasive and Not persuasive on the messages. Believability is the percentage of likely voters who responded Very persuasive (Not at all persuasive) on the positive (negative) messages. The higher the value of the metric, the more effective/more impactful/more believable the message is.

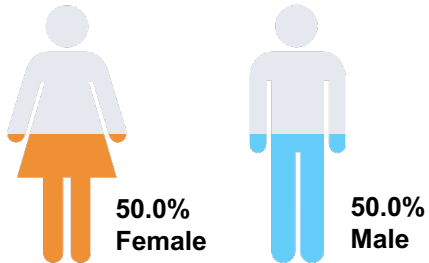
Pro-Understand Cost Message Mapping: Initial Unreasonable + Unsure (Cost of Drugs)



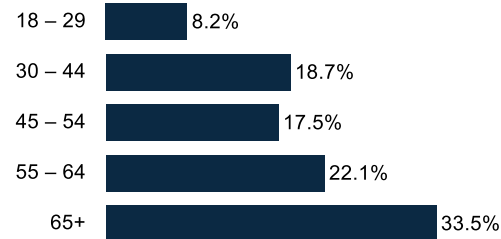
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Demographics

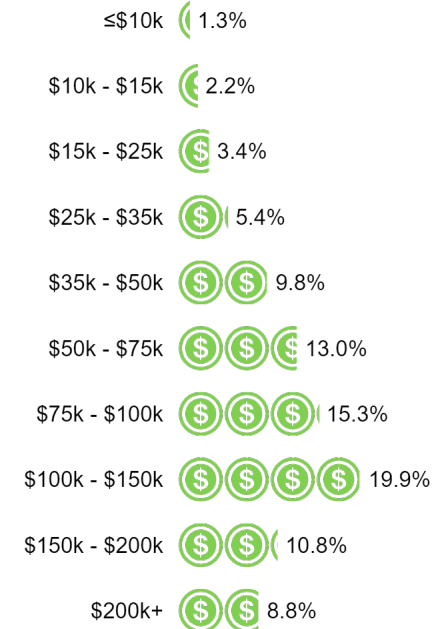
Sex



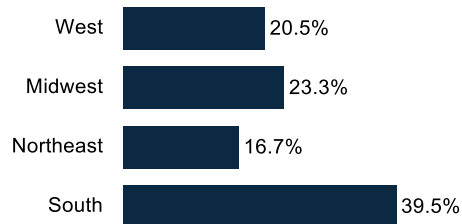
Age Range



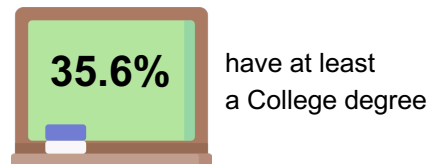
Household Income



Geo - State

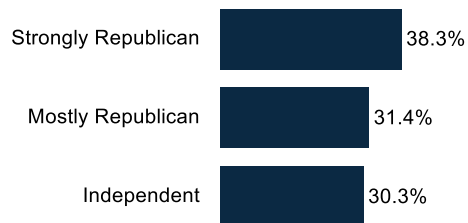


Education

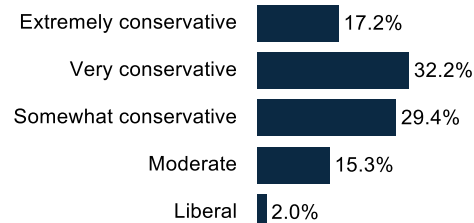


62.7% have no college degree

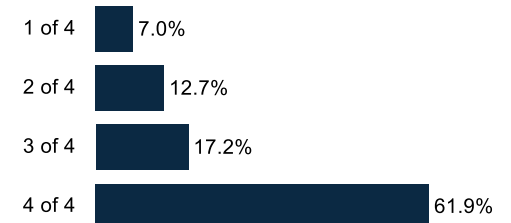
Partisanship



Ideology



General Election X of 4



Sample size: 1000