



National Online Survey of Seniors Regarding the Medicare Part D Prescription Drug Benefit

December 17-20, 2020



NORTH STAR
OPINION RESEARCH

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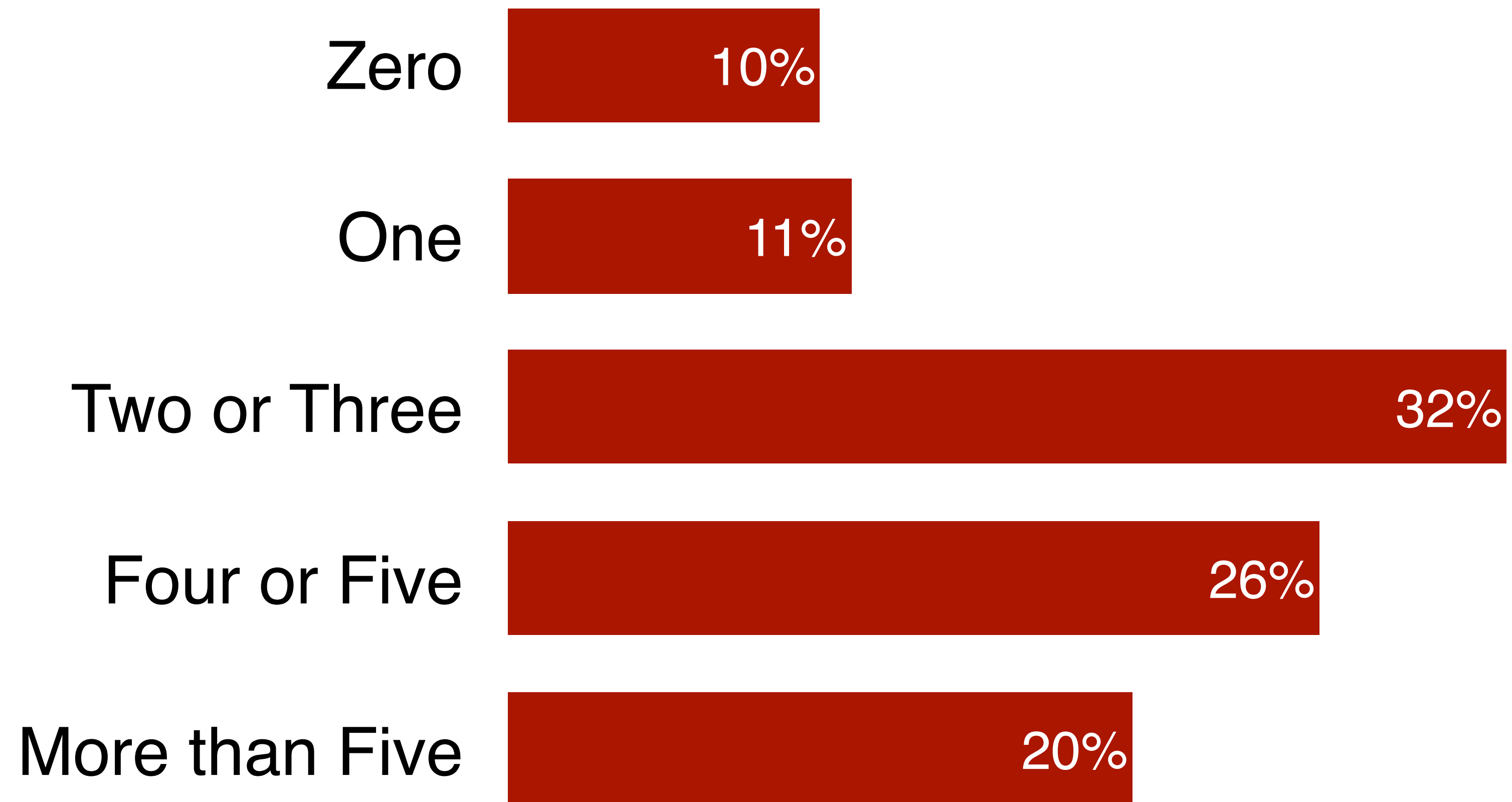
Methodology

- Survey conducted online December 17-20, 2020 with 800 respondents.
- Sample drawn from a list of seniors nationwide provided by Dynata.
- All respondents are age 65 or older, registered voters, and enrolled in Medicare Part D.
- Quotas were set for gender, age, race, and state.
- Margin of error is +/- 3.46%.

Views Toward Current Part D Plan

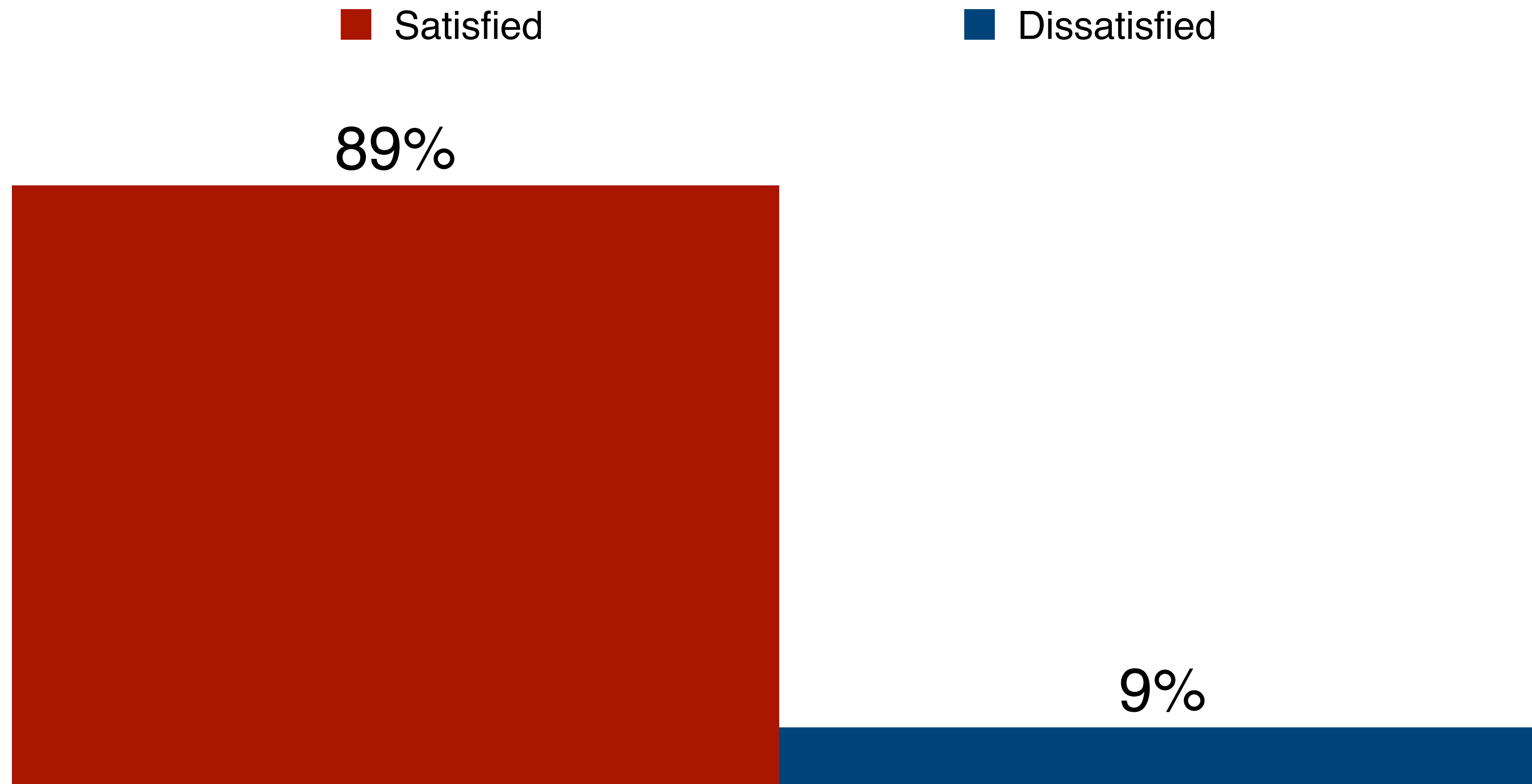
Nine in ten seniors take at least one prescription drug on a daily basis, and nearly half take four or more.

How many *prescription* drugs do you take on a daily basis?



Seniors are overwhelmingly satisfied with their Part D plan ...

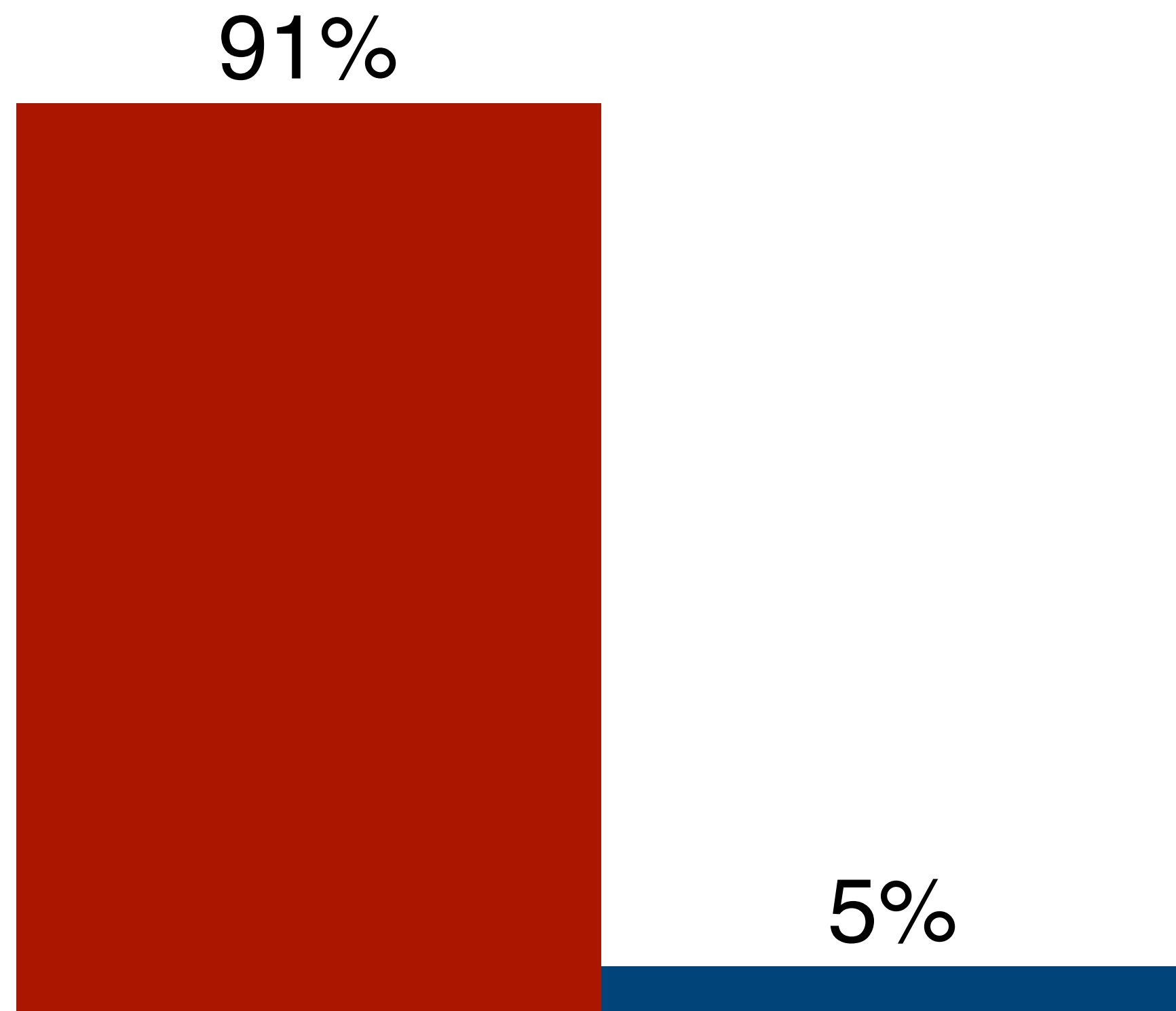
Overall, are you satisfied or dissatisfied with your current Medicare Part D prescription drug plan?



... almost unanimously saying that their plan covers the drugs they need and is convenient to use.

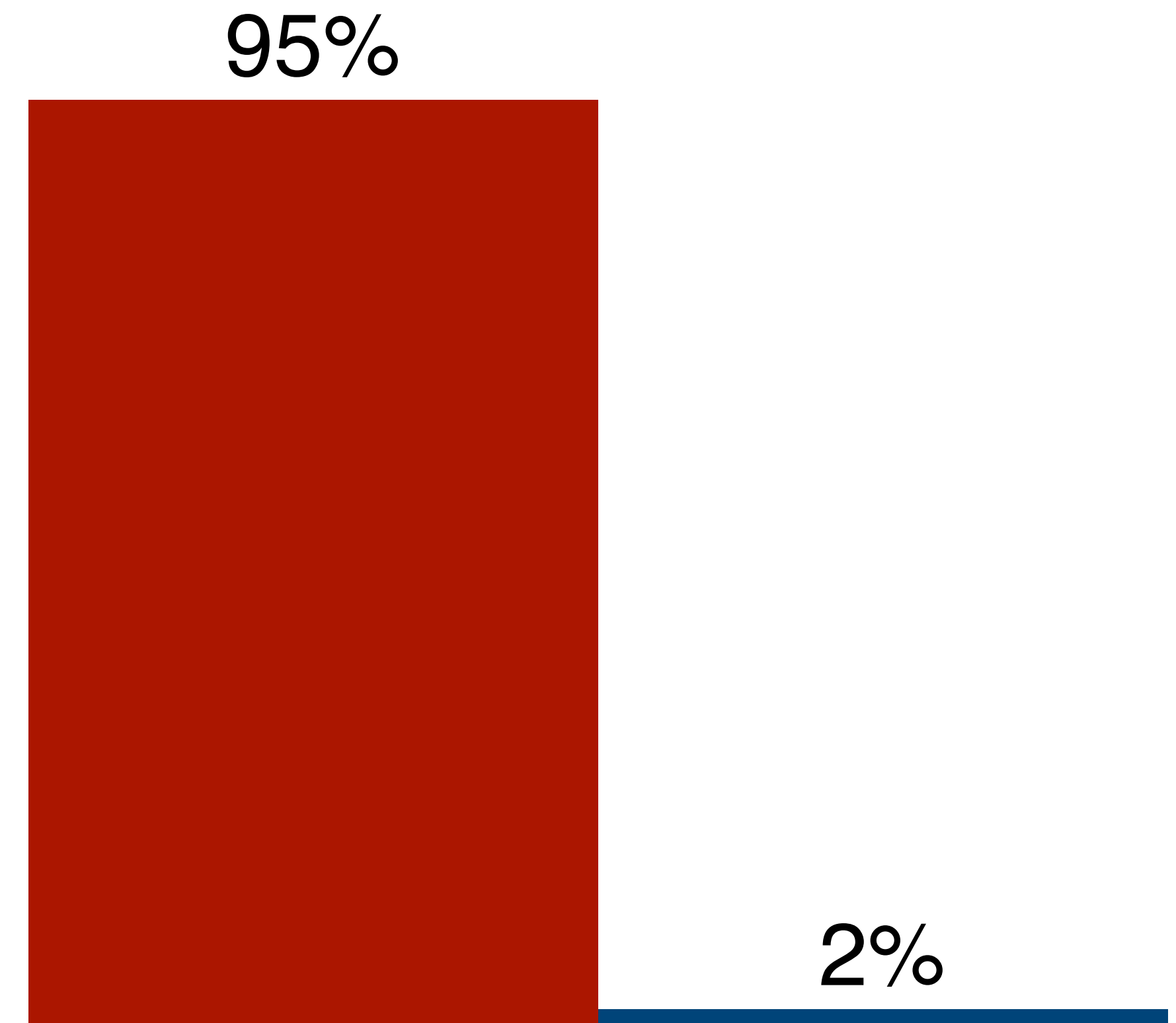
Does your current Medicare Part D prescription drug plan cover the drugs you need?

■ Yes ■ No



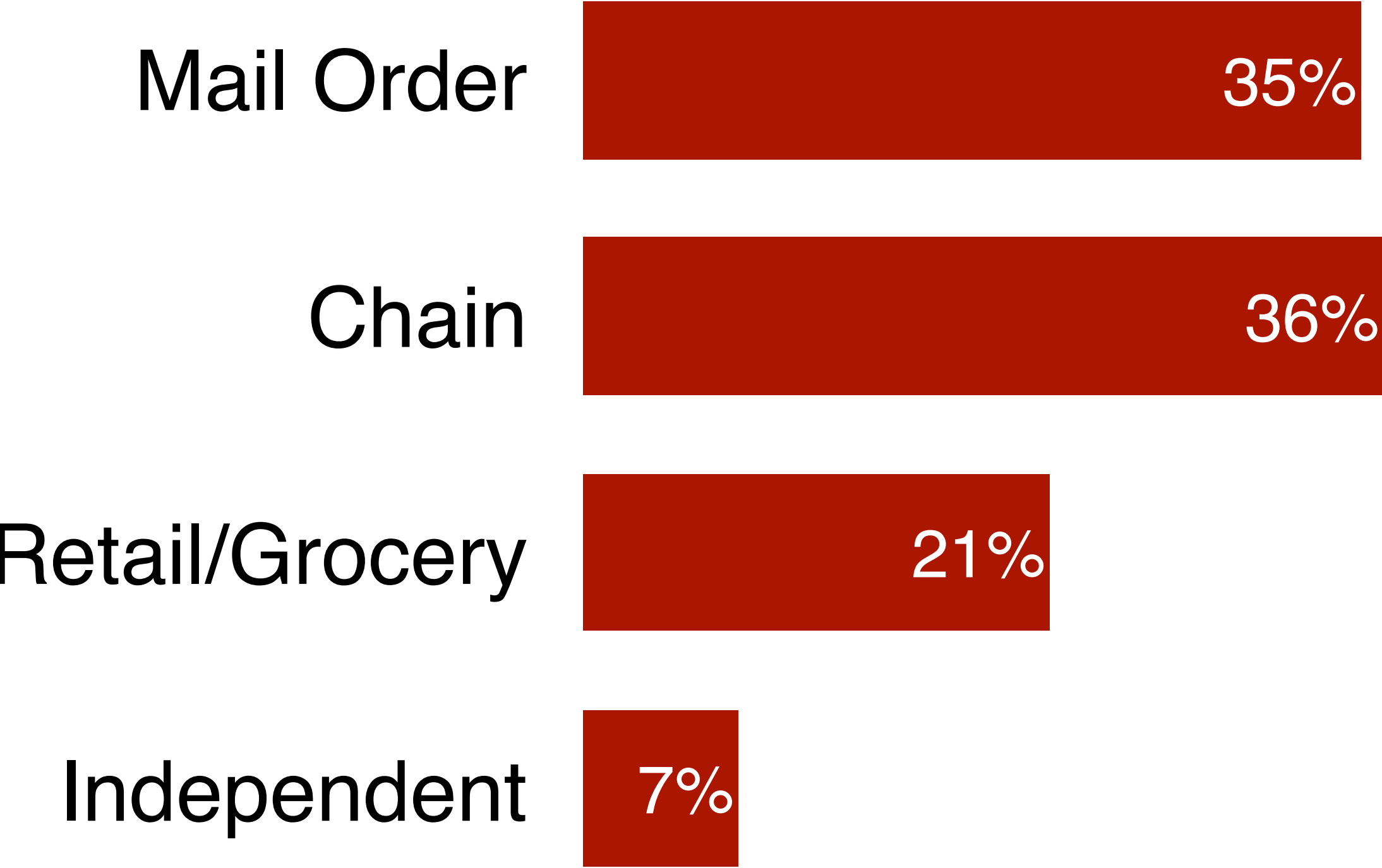
Would you say your current Medicare Part D prescription drug plan is convenient or inconvenient to use?

■ Convenient ■ Inconvenient

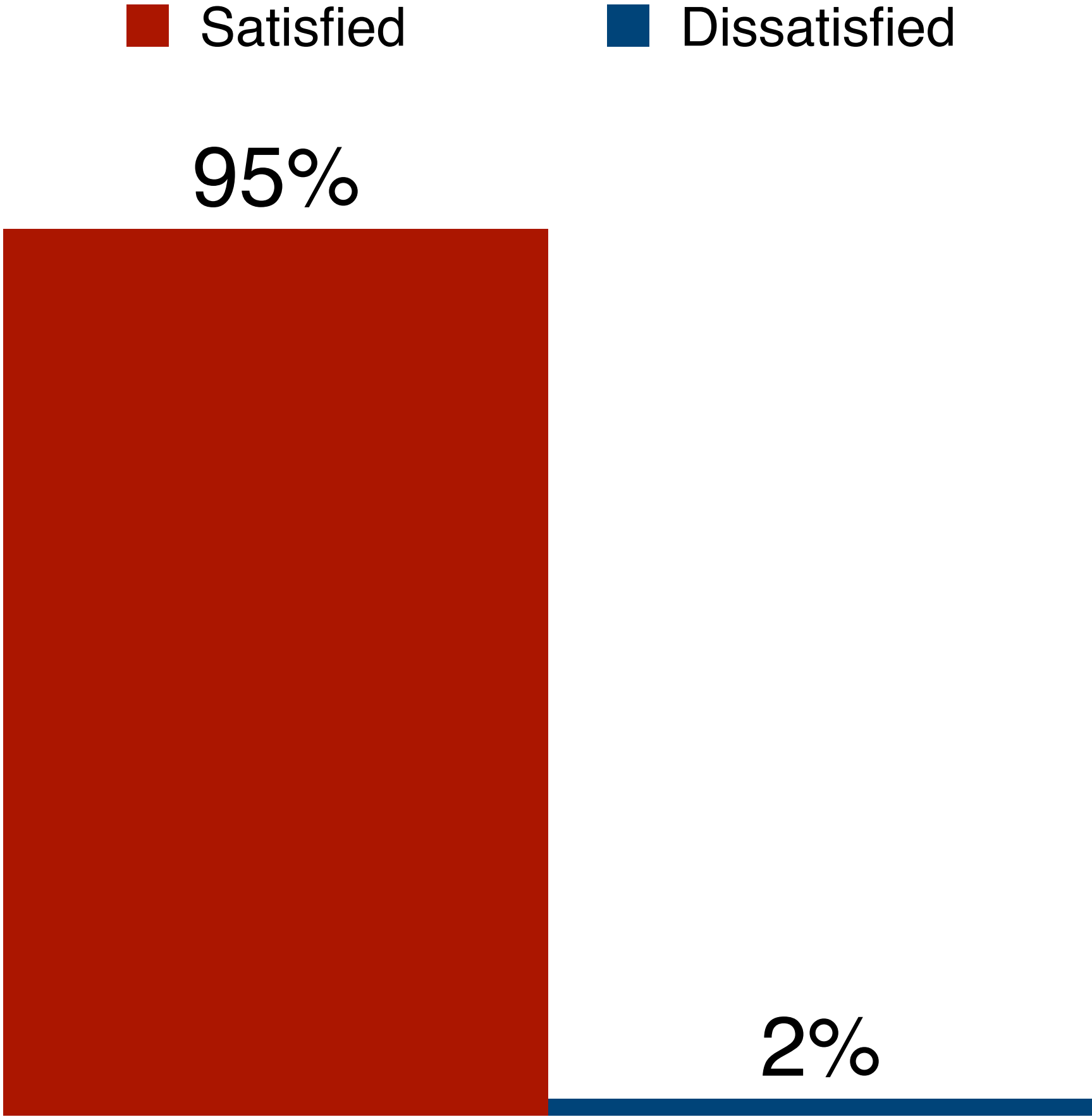


Seniors get their drugs in a variety of ways, but are universally satisfied with the number of pharmacies included in their Part D plan.

Do you get most of your prescriptions through a mail-order pharmacy, in person at a chain pharmacy like CVS or Walgreens, in person at big retail stores like Wal-Mart or a grocery store, or in person at a local independent pharmacy?

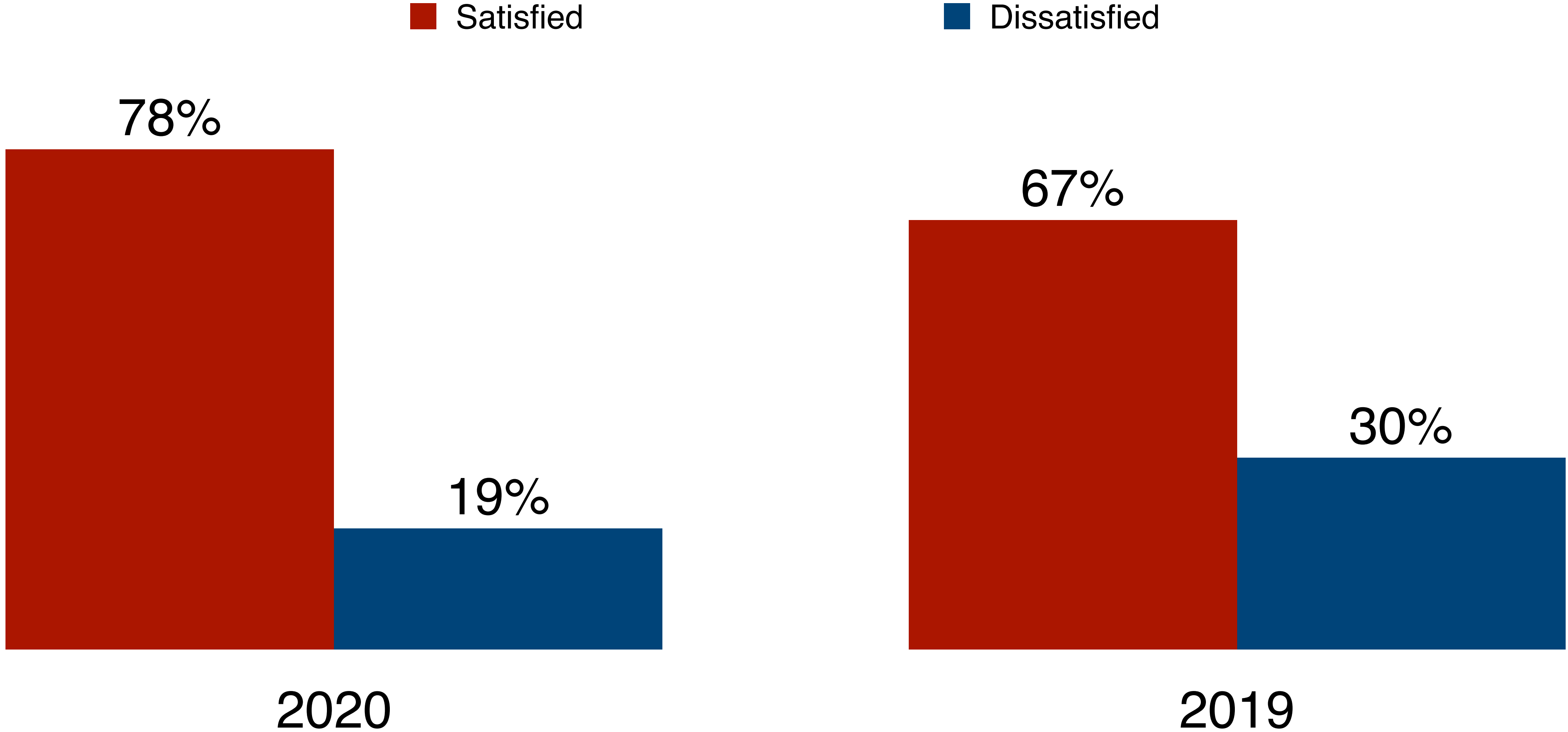


Are you satisfied or dissatisfied with the number of pharmacies that are included in your current Medicare Part D prescription drug plan?



Seniors' satisfaction with their out-of-pocket costs has improved since 2019.

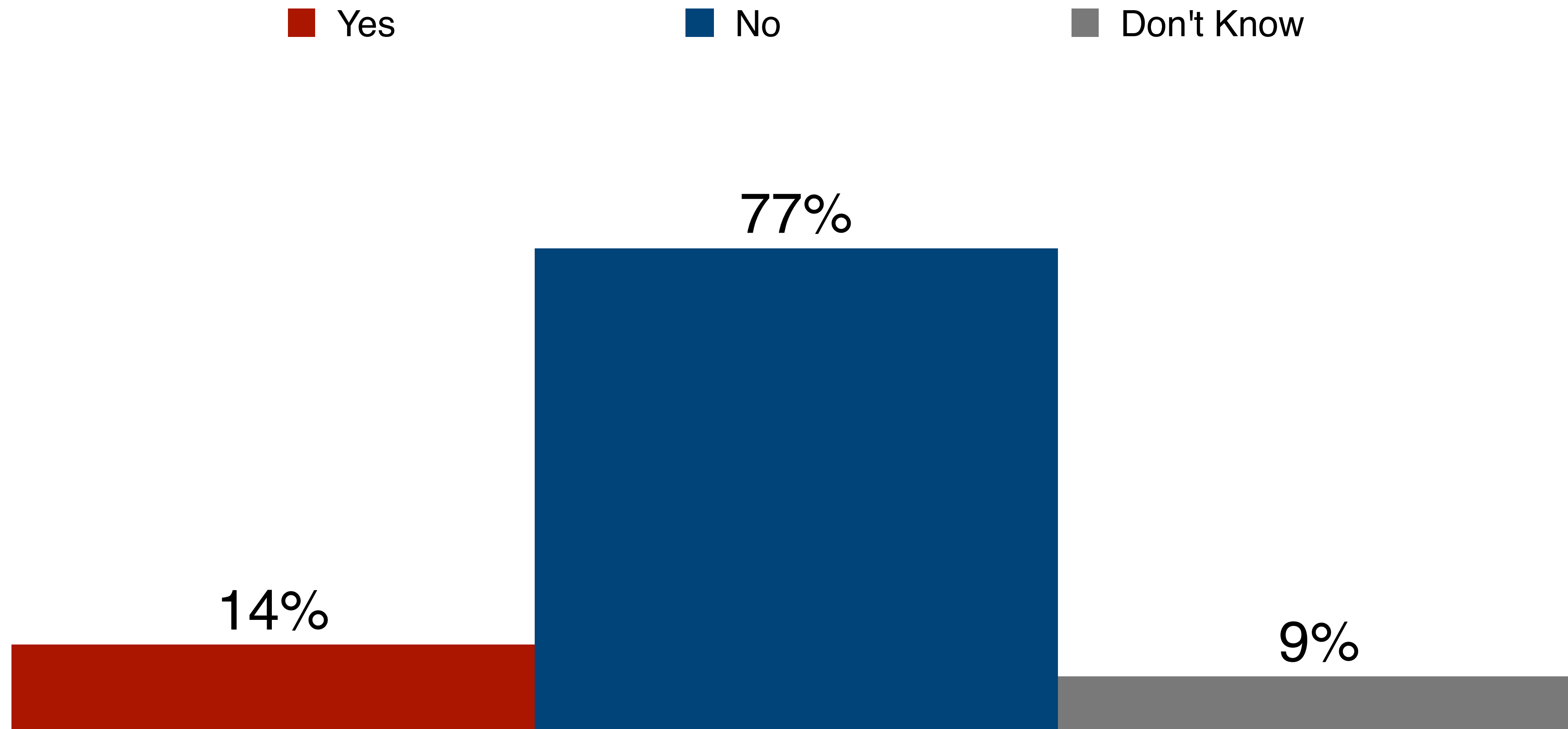
Are you satisfied or dissatisfied with the amount of money you pay out-of-pocket for prescription drugs with your current Medicare Part D program?



Views Toward Rebates

More than three-quarters of seniors have not heard anything about the recent changes to Part D.

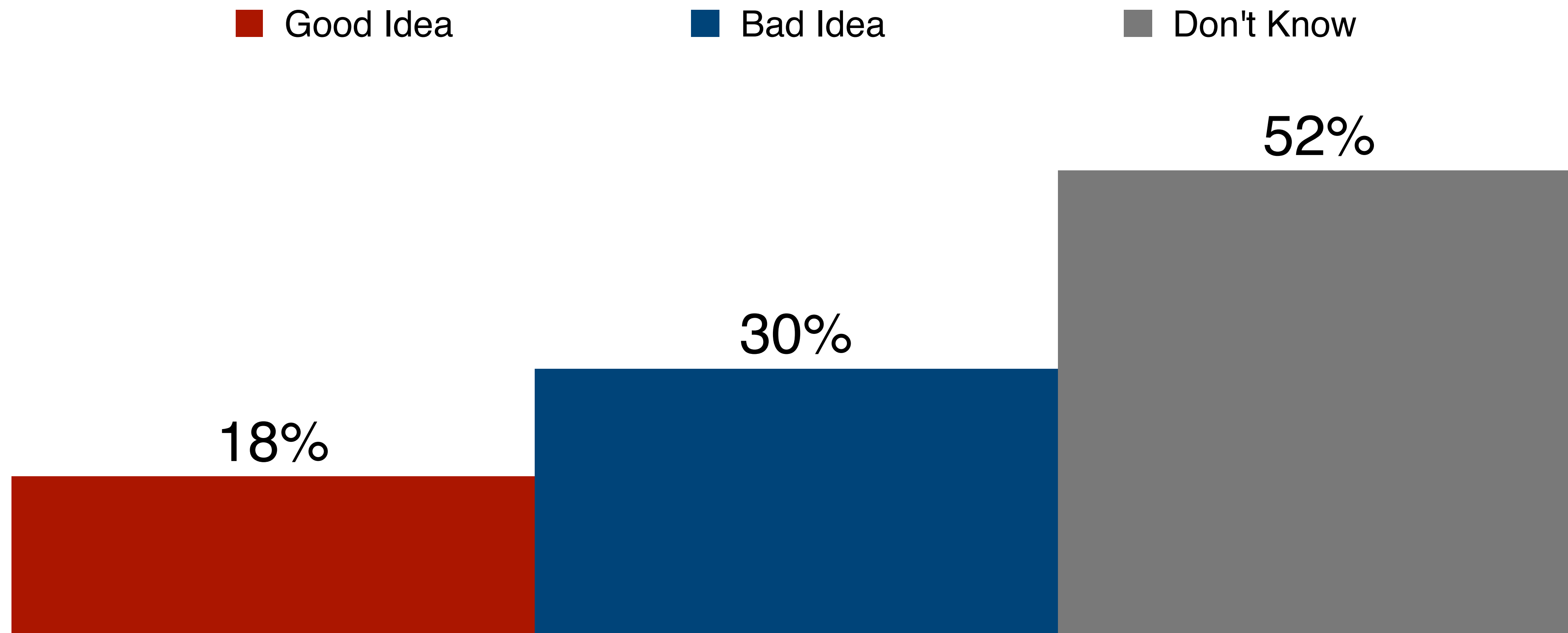
Have you seen, read, or heard anything recently about changes to the Medicare Part D program?



While half are unsure, seniors generally think it is a bad idea to eliminate drug rebates.

As you may know, drug manufacturers set list prices for their brand name drugs. Manufacturer rebates are price concessions provided by drug manufacturers based on the overall number of prescriptions.

The Secretary of Health and Human Services has eliminated the use of rebates in negotiations between health plans and drug manufacturers. Do you think it is a good idea or a bad idea to eliminate these rebates?



Seniors are also more likely to say that rebates reduce, rather than drive up, the cost of prescription drugs.

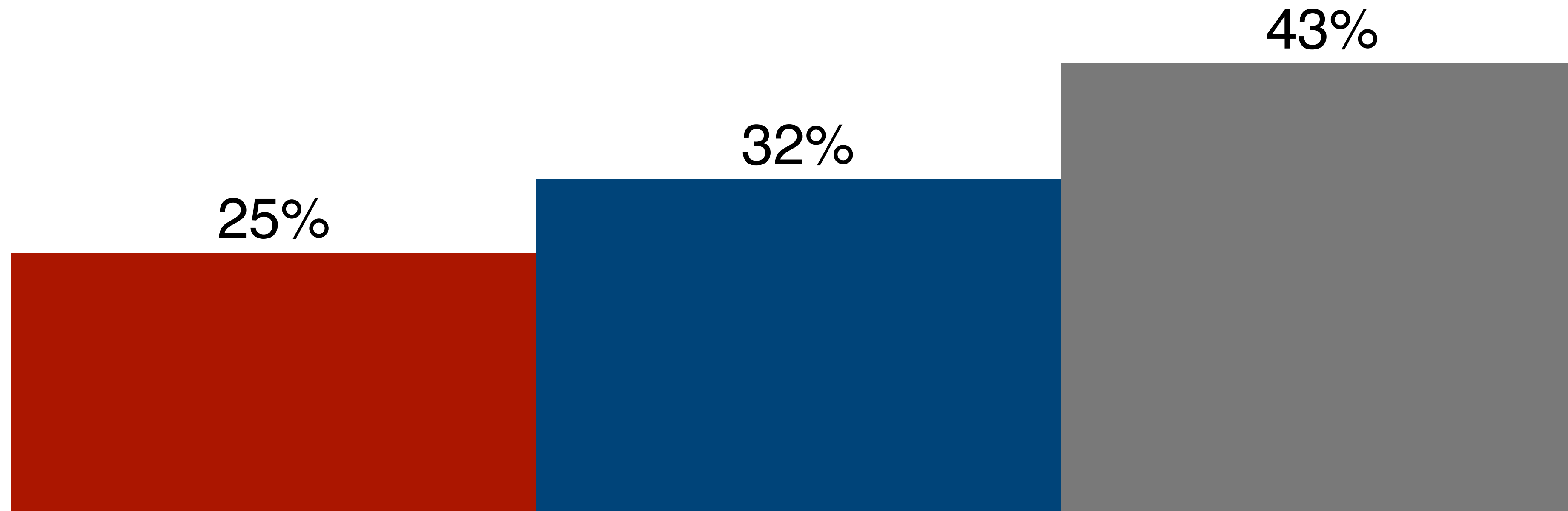
Which of the following statements comes closer to your view about drug rebates:

- a) Rebates drive up the cost of prescription drugs because they force the drug manufacturers to increase their list prices so they can then give rebates to health insurance plans that provide drug benefits to consumers.
- b) Rebates reduce the cost of prescription drugs because they force the drug manufacturers to compete with other manufacturers to keep costs low and be included in the list of covered drugs for consumers by health insurance plans that provide drug benefits for consumers.

■ Drive Up Cost

■ Reduce Cost

■ Don't Know



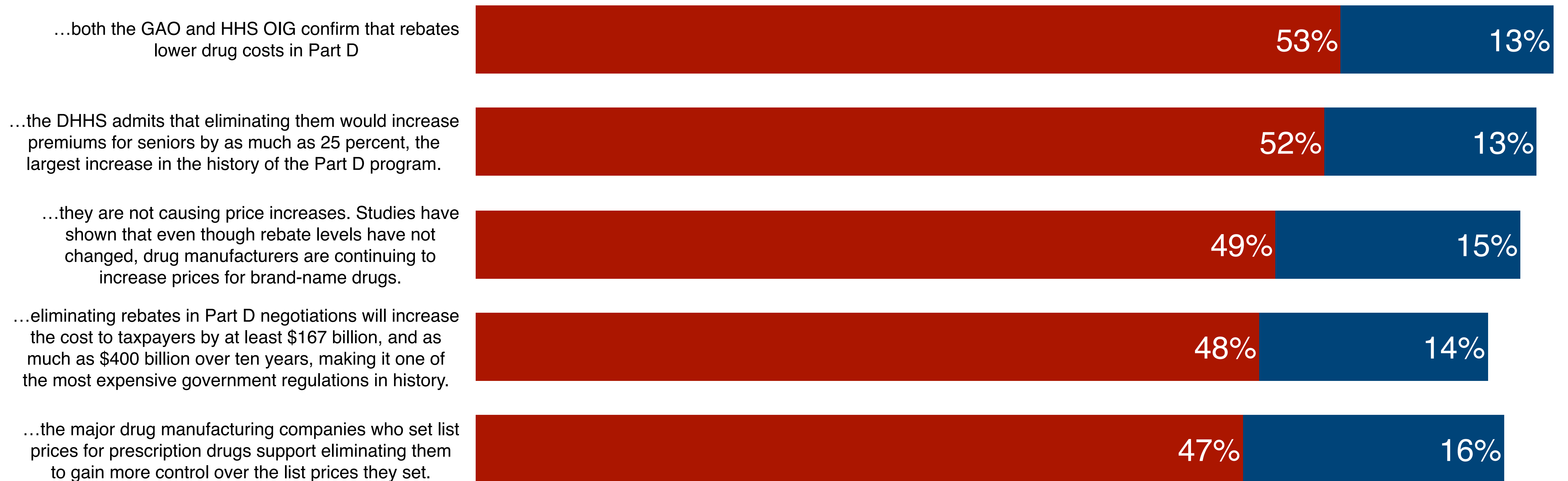
Seniors agree with a number of statements regarding the continued use of rebates.

Here is a list of statements regarding the use of rebates in negotiations for prescription drugs covered by Medicare Part D plans. For each one, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with that statement:

Medicare Part D should continue to use rebates, because...

■ Agree

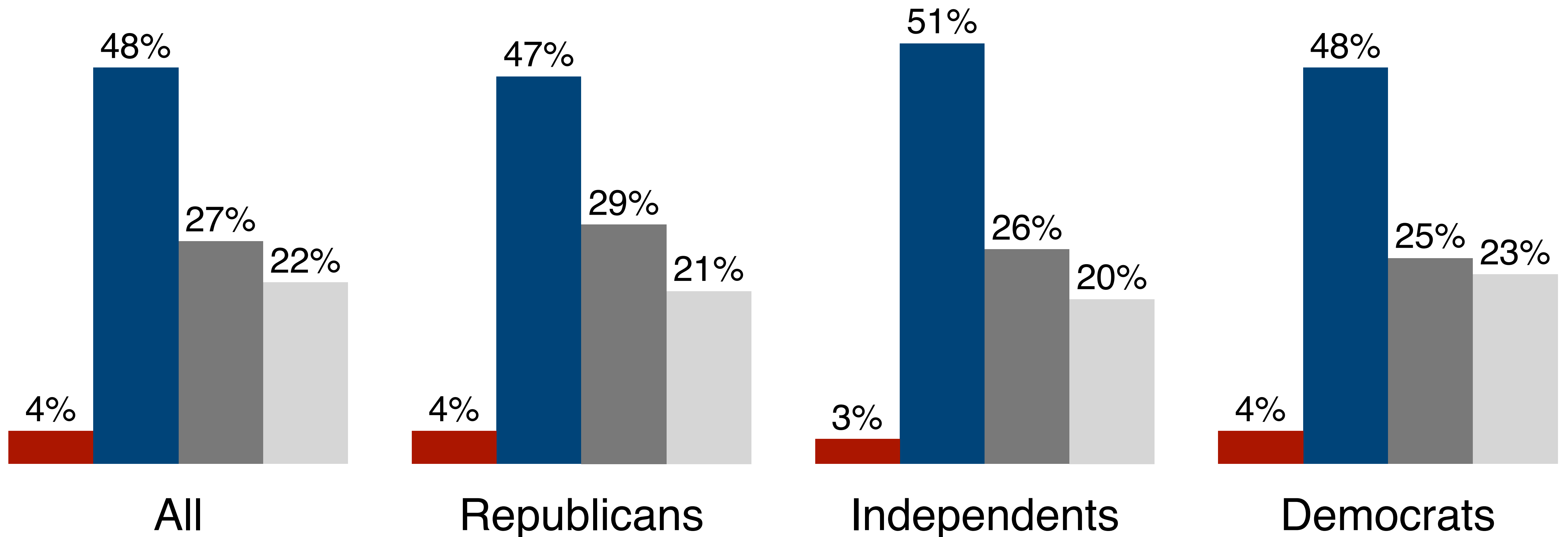
■ Disagree



Nearly half of seniors would be less likely to support a senator or representative who supported a rebate elimination that increased premiums.

If your U.S. Senator or representative supported eliminating the rebate negotiations from Medicare Part D and premiums go up, would that make you more likely to support his or her reelection, less likely to support his or her reelection, or would that have no real effect on your support?

■ More Likely ■ Less Likely ■ No Effect ■ Don't Know

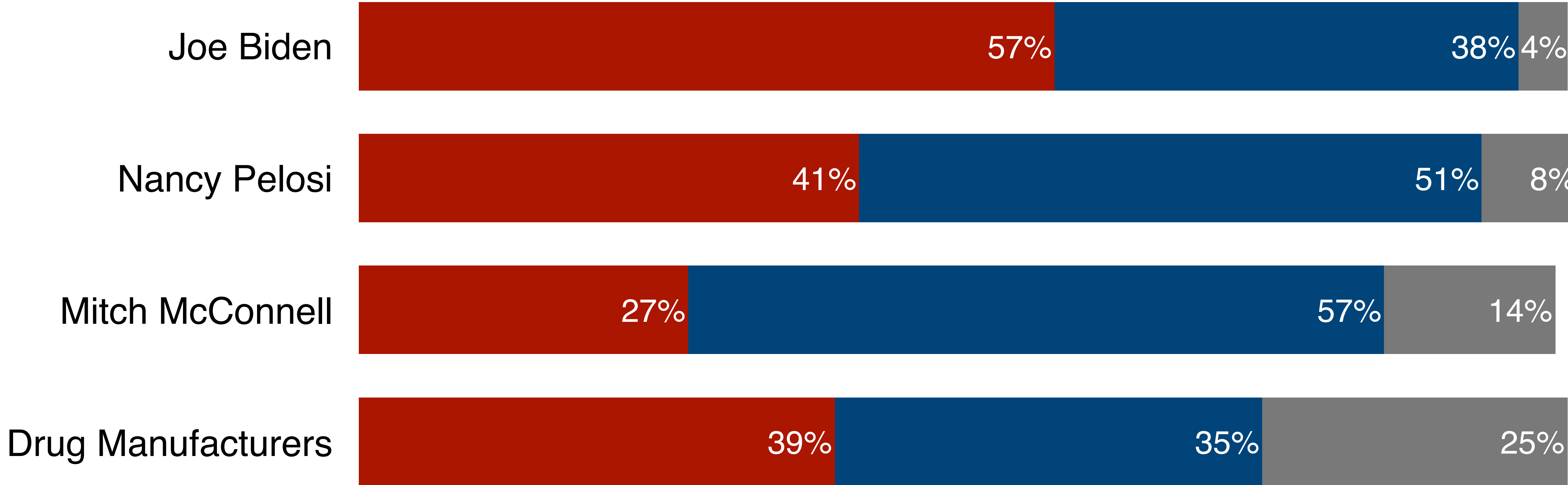


Political Environment

Seniors view Joe Biden favorably, Nancy Pelosi and Mitch McConnell unfavorably, and split on drug manufacturers.

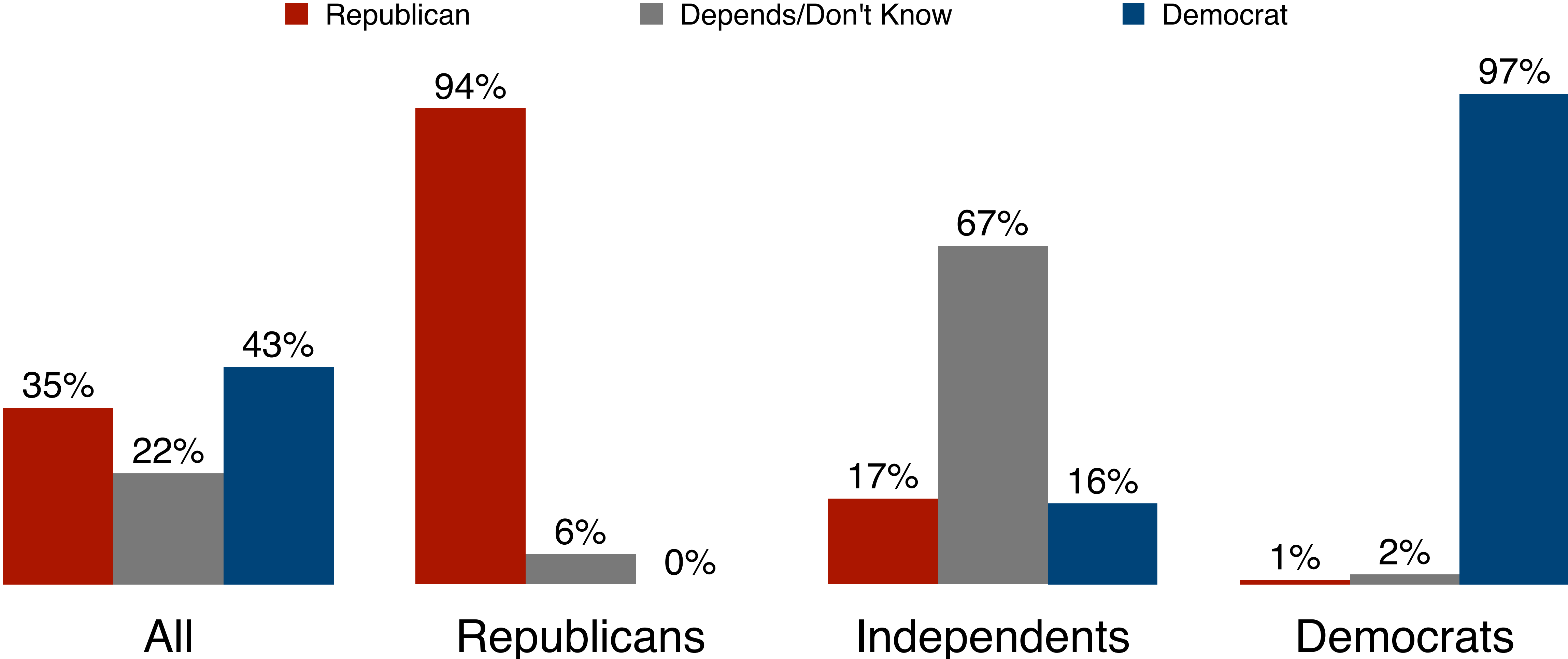
Now, I would like to show you a list of names of people and groups and have you tell me, for each one, whether you've heard of that person or group and, if so, whether you have a favorable or unfavorable opinion of them. If you haven't heard of the person or group, just say so:

■ Favorable ■ Unfavorable ■ No Opinion



Democrats hold an 8-point advantage on the generic ballot among seniors.

In general, would you prefer a Republican or a Democrat as your next representative in Congress?



97%

35%

22%

43%

94%

6%

0%

67%

17%

16%

1%

2%

All

Republicans

Independents

Democrats



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