



Key Findings From A National Survey Of Voters



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On behalf of the Biotechnology Industry Organization (BIO), Public Opinion Strategies and Hart Research Associates conducted a national survey of N=800 registered voters.

The survey was conducted June 5-7, 2011 and has a margin of error of ±3.5%.



What Matters to Voters?

Even in these fiscally focused times, finding cures to serious diseases ranks in the top tier of issues that matter to Americans.

Personal Importance of Issues

Ranked By %Very Important

%Extremely Important (%10) | *%Very Important (%8-10)*

Top Tier Issues

Improving the economy and creating good paying jobs.	62%	90%
Improving the quality of public education.	44%	75%
Reducing the federal budget deficit and government spending.	46%	74%
Finding cures to help patients suffering from serious diseases such as cancer, Parkinson's disease, Alzheimer's disease, HIV/AIDS and multiple sclerosis.	44%	72%
Combating terrorism at home in the United States and overseas.	43%	68%

Ranking in the second tier of issues that matter to voters are other key areas of focus for the biotechnology industry.

Personal Importance of Issues

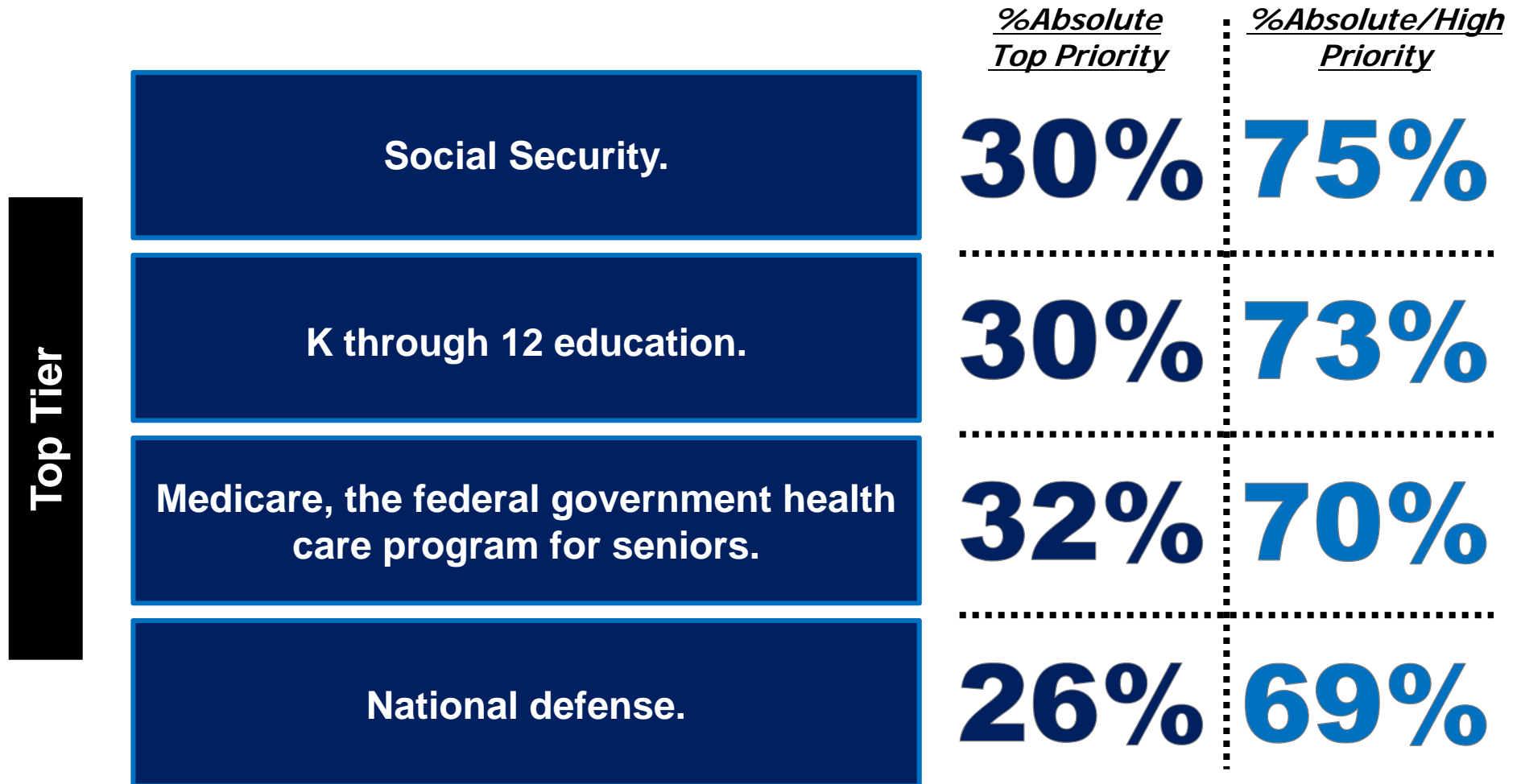
		<i>Ranked By %Very Important</i>	<i>%Extremely Important (%10)</i>	<i>%Very Important (%8-10)</i>
Second Tier Issues	Developing alternative energy from renewable resources to serve as a significant replacement for traditional fossil fuels.		31%	61%
	Securing our borders and addressing the issue of illegal immigration.		34%	57%
	Alleviating the problem of hunger and malnutrition by increasing food production and enhancing its nutritional value.		30%	57%
	Reducing taxes.		32%	56%
	Protecting the environment from pollution and global warming.		30%	54%
Third Tier Issues	Improving the nation's roads and highways.		17%	38%
	Increasing taxes to pay for important government programs.		8%	21%



How Do Voters Prioritize Government Spending?

Voters have a clear top set of funding priorities that includes Social Security, Medicare, education and defense.

Federal Spending Priorities



As you may know, Congress is assessing its priorities when it comes to federal spending. For each of the following, please tell me if you think a continued commitment to federal spending in this area is an absolute top priority, a high but not top priority, a medium priority, a lower priority, or do you think this should not be a priority for federal spending?

However, continued funding for biotechnology research receives majority support in a second tier of priorities, far outpacing other areas of federal spending.

Federal Spending Priorities

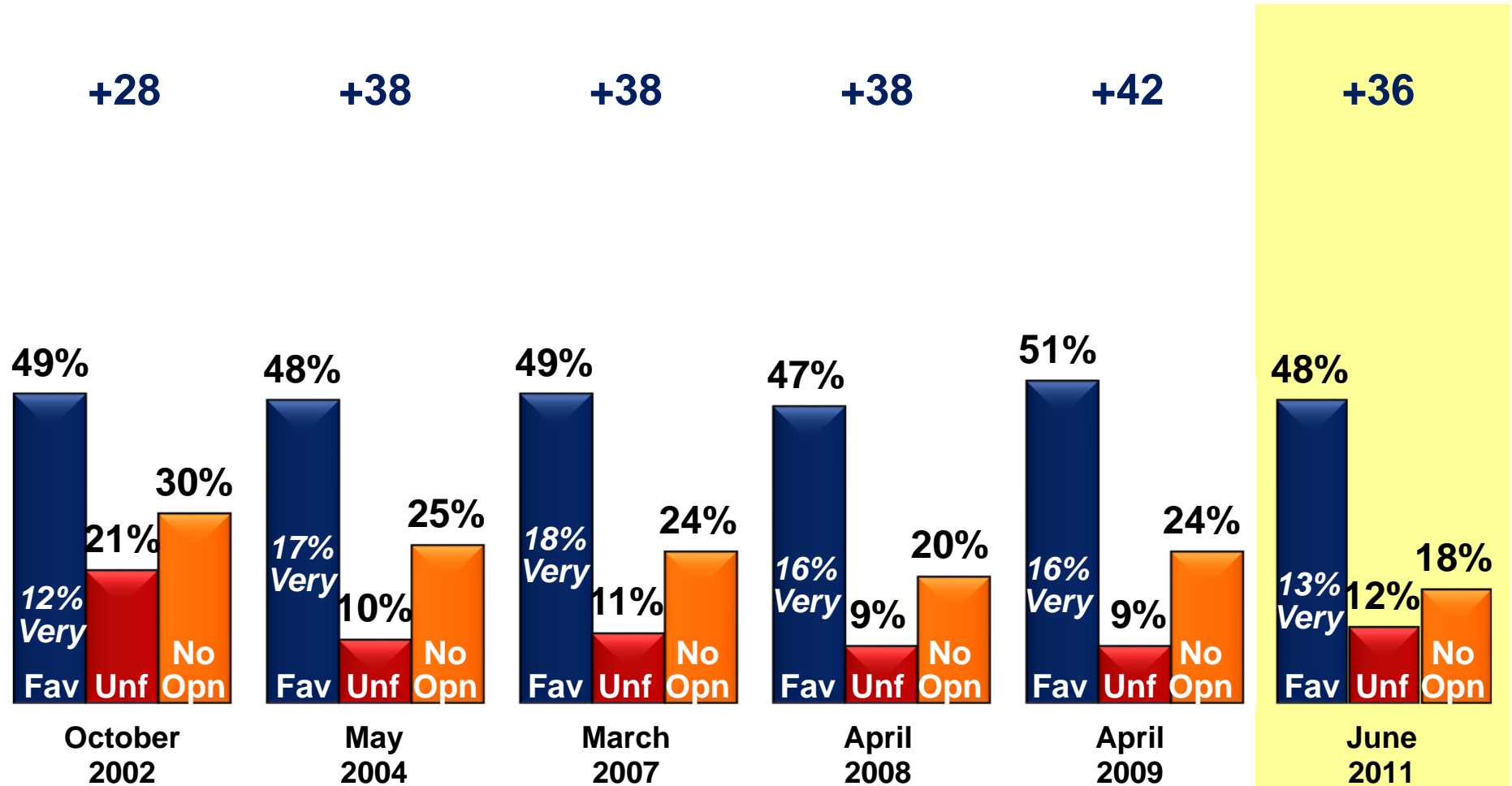
		<i>%Absolute Top Priority</i>	<i>%Absolute/High Priority</i>
Second Tier	Medicaid, the federal government health care program for the poor.	19%	58%
	Research to find alternative sources of energy.	22%	57%
	Research to discover life saving medicines and cures.	20%	54%
Third Tier	Unemployment insurance.	14%	42%
	College loan and grant programs for students.	13%	39%
	Transportation and infrastructure projects.	7%	29%
	Federal assistance to state governments.	6%	25%



How Do Voters Perceive The Biotechnology Industry?

The image of biotechnology companies is solid and stable, continuing to garner a favorable opinion among roughly half the public.

The Image of Biotechnology Companies



Voters were given some information about biotechnology companies

Biotechnology companies use biological processes and technology to develop medicines and cures for hard to treat, life threatening diseases. Biotechnology companies also develop different forms of alternative energy, environmentally friendly products, agricultural methods to increase food production to alleviate hunger and malnutrition, and protections against bio-terror threats.

After hearing just a brief summary, voters' impression of biotechnology companies sky-rockets.

The Image of Biotechnology Companies

Image Before Information

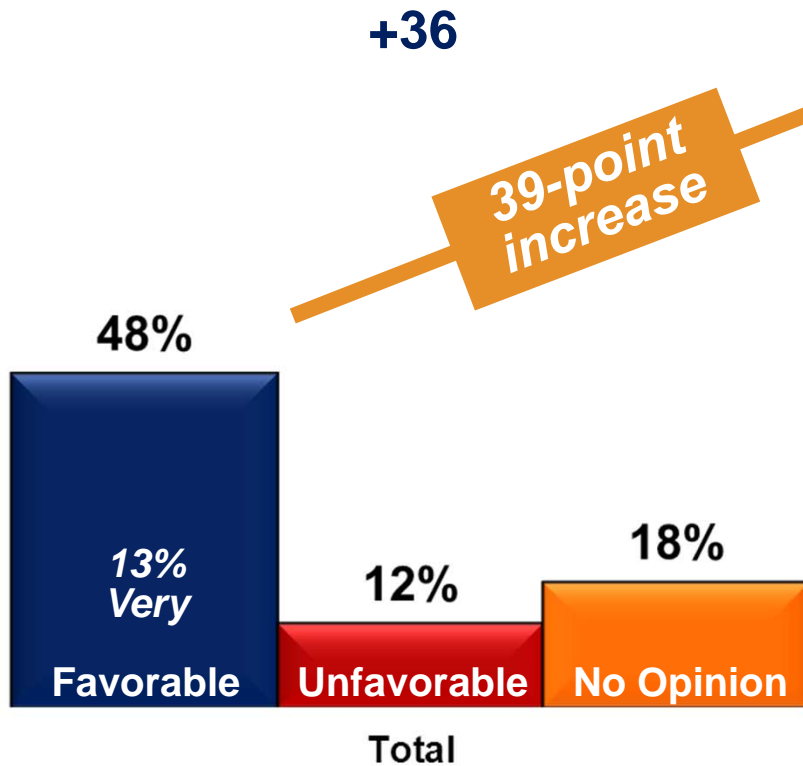
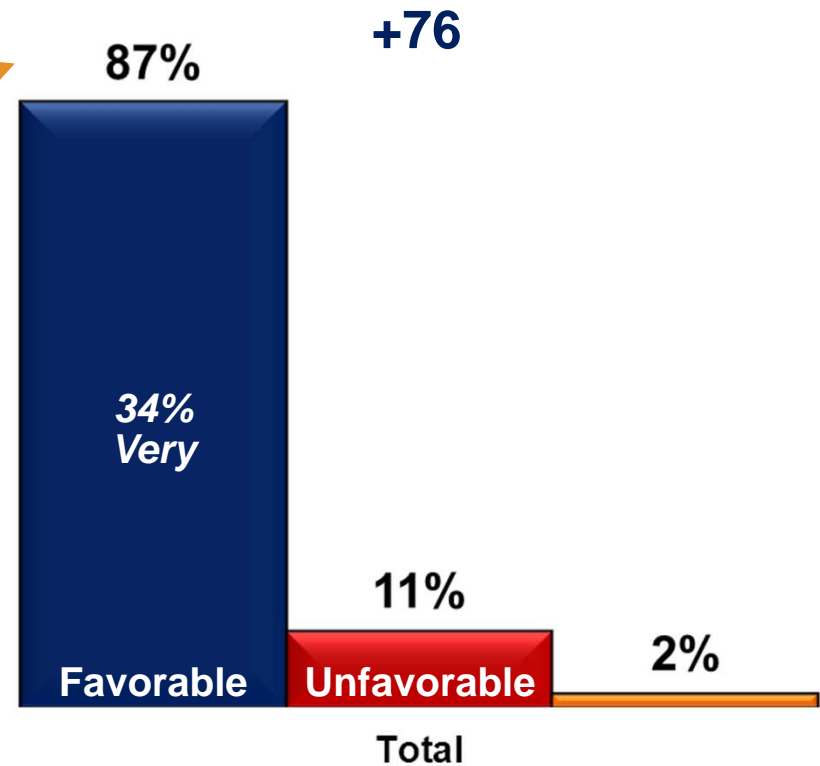


Image After Information



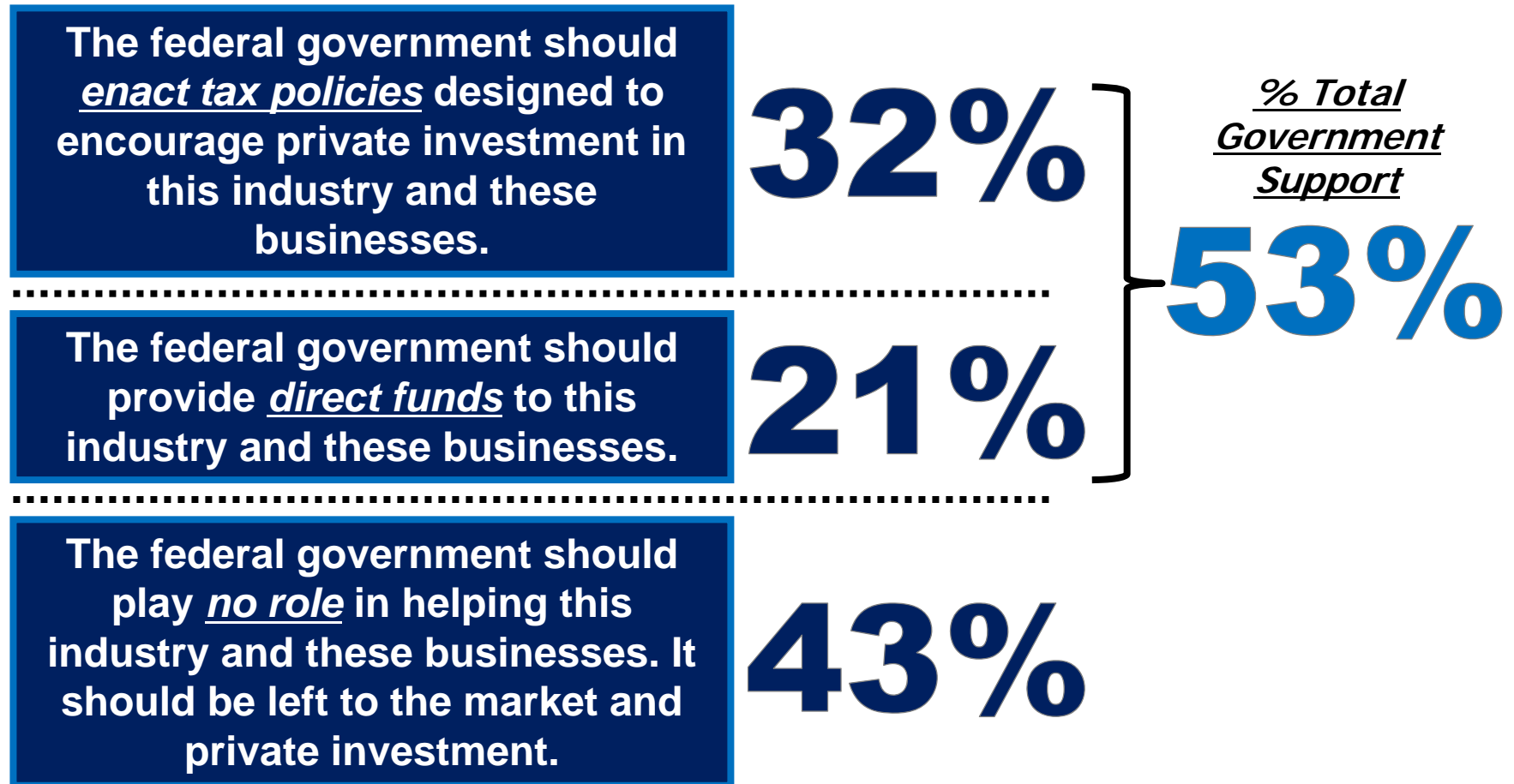
39-point increase



What Is The Role Of Government In The Biotech Industry?

A majority of voters believe the government should support the industry – either through tax policies or direct funding.

Role of Government in Biotech





There are some plausible arguments that can be made to support cut backs to federal spending on biotechnology research.

Highlighting the level of private funding in the biotech industry can be a persuasive argument for cutting back on federal funds to the industry.

The biotech industry does not need federal funds. U.S. biotech companies invest several billion dollars annually in research and development and nearly all of the industry's funding comes from the private sector. The industry is growing, creating jobs and leading the world even during these tough economic times. Given our nation's debt, and the need to prioritize federal spending, funding for the biotech sector should be cut back.

% Very Convincing

21%

% Total Convincing

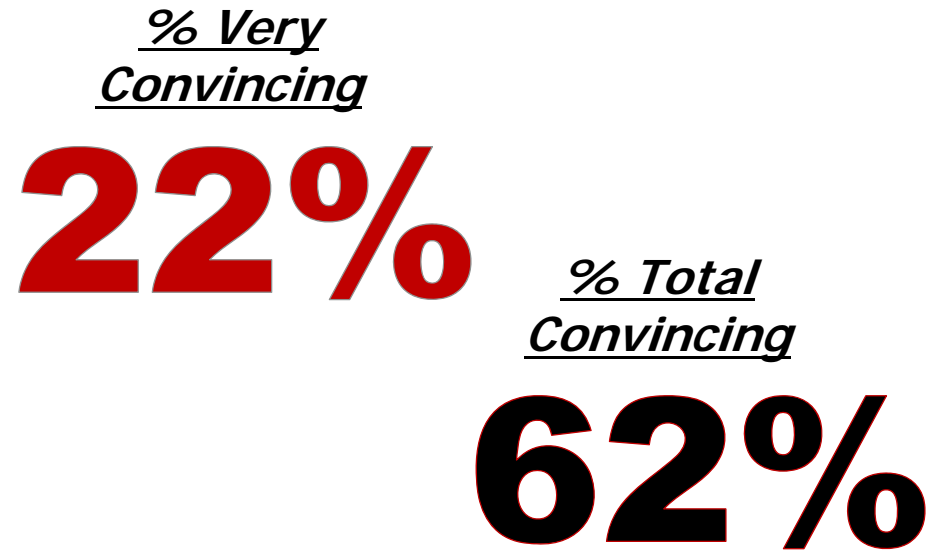
72%

By Party

	<u>Very Conv</u>	<u>Tot Conv</u>
GOP	24%	83%
IND	21%	71%
DEM	17%	62%

Focusing on some of the controversial issues surrounding the biotech industry is less compelling.

While biotech may have done some good for society, the industry can also present ethical and moral dilemmas as it experiments with DNA, genetic engineering and cloning. We have no way of knowing the long-term side effects of much of the work that is being done and we have no guarantee that companies are going to use their discoveries for the common good. Federal dollars should not be used to fund such controversial research, especially at a time when our nation is facing a debt crisis and needs to prioritize on federal spending.



By Party

	<i><u>Very Conv</u></i>	<i><u>Tot Conv</u></i>
GOP	28%	69%
IND	22%	58%
DEM	20%	61%



However, messages that communicate how biotechnology can help patients, cut federal health care spending and save the budget trillions are persuasive in garnering voter support for a continued commitment to federal spending on biotechnology research.

Noting biotech's progress in fighting Alzheimer's and other serious diseases in the context of baby-boomers' coming of Medicare age is convincing.

Now that America's baby boomers have reached retirement age it means ten thousand new Medicare participants per day for the next nineteen years. It is estimated that as many as one-in-eight of these new enrollees will be diagnosed with Alzheimer's – which means their Medicare expenses will be three times those of a healthy senior. America's biotechnology industry is working every day to cure Alzheimer's – as well as diseases such as cancer, diabetes and Parkinson's. Curing these diseases will help patients, cut federal health care spending and save the American budget trillions.

% Very Convincing

28%

% Total Convincing

76%

By Party

	<i><u>Very Conv</u></i>	<i><u>Tot Conv</u></i>
GOP	18%	65%
IND	24%	76%
DEM	43%	86%

Developing new medicines so fewer patients suffer from disease is a message that also has some resonance with voters.

The best way to reduce Medicare and Medicaid costs is to develop innovative new medicines so fewer patients suffer from disease. America's biotechnology scientists and researchers are making real progress on finding cures for Alzheimer's, cancer, diabetes and Parkinson's disease, and one day Alzheimer's could be as preventable as polio. Curing these diseases will help patients, cut federal health care spending and save the American budget trillions.

% Very Convincing

26%

% Total Convincing

70%

By Party

	<i><u>Very Conv</u></i>	<i><u>Tot Conv</u></i>
GOP	23%	70%
IND	20%	61%
DEM	36%	83%



How Do Voters Rate The Work That Is Being Done By Biotechnology Companies?

Advances in prevention and treatment for diseases are considered the most important contributions from the biotechnology industry.

Work Being Done By Biotech Companies

Ranked By % Very Important

Top Tier Contributions

	<i><u>% Very Important</u></i>	<i><u>% Total Important</u></i>
Biotechnology-based "clot buster" drugs allow doctors to dissolve blood clots, saving lives and reducing damage associated with heart attacks.	68%	85%
Biotechnology has developed hundreds of diagnostic tests that keep the blood supply safe from the HIV/AIDS virus and detect other conditions early enough to be successfully treated.	67%	82%
Biotechnology is developing vaccines aimed at preventing and targeting many diseases ranging from flu to cancer and HIV, and it has succeeded in making enormous inroads in the prevention of infectious disease.	62%	80%
Biotechnology has created more than two hundred fifty new therapies to help treat serious diseases such as cancer, Parkinson's disease, Alzheimer's disease, HIV/AIDS and multiple sclerosis, and it has more than six hundred new biologic medicines in development.	59%	78%
Biotechnology is used to help with environmental cleanups such as oil and chemical spills.	59%	75%
Biotechnology plays a role on the front lines of our national defense. It helps military units and disaster responders fight chemical weapons such as sarin gas and it is developing advanced vaccines to create new ways to protect against biologic weapons such as anthrax.	56%	72%
Biotechnology is developing advances in personalized medicine allowing doctors to identify the most effective course of treatment for a patient, thereby reducing the potential for adverse side-effects and unnecessary health care costs.	53%	74%
Biotechnology uses DNA and gene mapping to develop advanced medical diagnoses so that treatment can be tailored specifically to an individual patient and used to determine a person's risk of developing certain diseases such as cancer or diabetes.	50%	72%

Now, I am going to read to you some of the things the biotechnology industry is already doing or has done. For each one please tell me how important a contribution it is...is it VERY important, FAIRLY important, JUST SOMEWHAT important or NOT important?

Almost half of voters say it is very important that the industry employs so many people and pays a high annual wage.

Work Being Done By Biotech Companies

Ranked By % Very Important

Second Tier Contributions

	<i><u>% Very Important</u></i>	<i><u>% Total Important</u></i>
U.S. biotechnology employs almost 1.5 million people, pays a high annual average wage of more than \$77,000 and supports an additional six million jobs.	47%	67%
Biotechnology-based agricultural methods reduce the environmental impact of farming by reducing the reliance on chemical pesticides, requiring less water use and increasing overall agricultural sustainability.	44%	66%
Biotechnology helps create alternative fuels, including advanced biofuels made from renewable, non-food sources.	44%	63%
Biotechnology-based agricultural methods have allowed farmers to increase food production and enhance its nutritional value without increasing the amount of land required for production.	42%	64%
Biotechnology-based agricultural methods have allowed farmers to improve the nutritional content of food staples creating products such as rice fortified with Vitamin A which is critical for eyesight and anemia prevention.	39%	61%
U.S. biotechnology is a multi-billion dollar industry that leads the world in innovation and product development.	32%	54%

Now, I am going to read to you some of the things the biotechnology industry is already doing or has done. For each one please tell me how important a contribution it is...is it VERY important, FAIRLY important, JUST SOMEWHAT important or NOT important?



Summary Observations

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- **Even in these tough economic times, voters rate the importance of finding cures to diseases as one of the most important issues.**
- **A majority of voters say that it should be a top or high priority for Congress to commit to continued funding for research focused on alternative energy and finding cures for our most deadly diseases.**

Summary Observations

- **The case can be made for cutting back federal funds to biotech companies.**
- **BUT, voters are just as convinced that funding should be continued when they learn about the industry's work and how it can help both the health of patients and our country's financial situation.**
- **AND, a majority of voters say they would like to see some level of government support for the biotech industry, either in the form of tax policies or direct funds.**



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