

Feelings Outweigh Facts

Your new drug works? Patients don't care how. They want to know what it means in their lives.

By David Rees

Imagine a person sitting alone in his living room suffering through a pounding migraine, while the rest of his family sits together around the kitchen table. He wants to join them, but his symptoms render him motionless. Now, imagine he has the choice to take two different drugs that promise to alleviate symptoms of his migraine. Drug A promises to help at the source of the problem by decreasing the frequency of swollen blood vessels around the brain, while drug B promises migraine-free days with more time to spend with the family. What do you think he would choose?

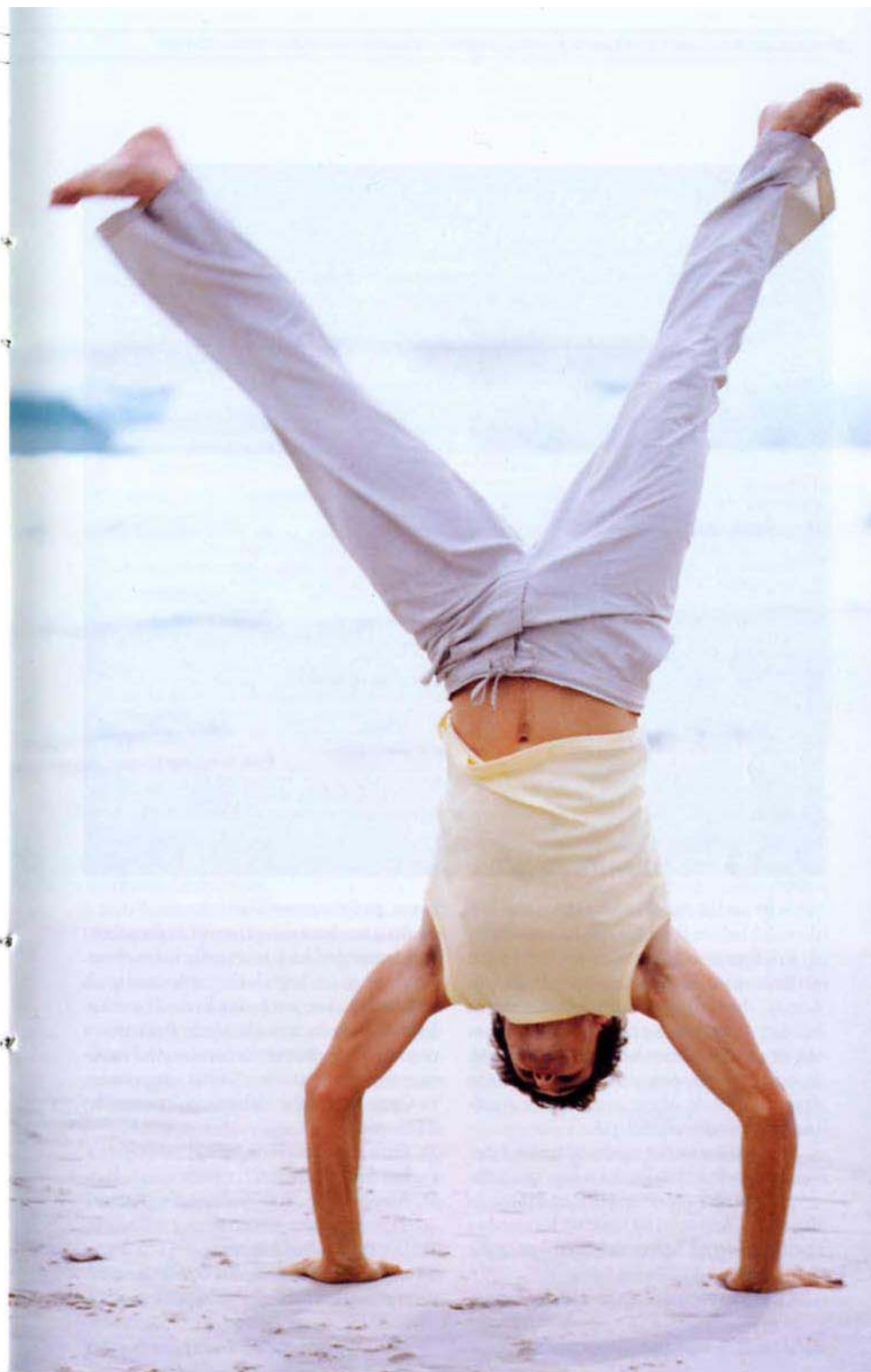
A study looks at what motivates consumers to fill a brand prescription based on how a patient values his or her therapy, what attributes are most important

when choosing a drug, and what effect co-pays have on those decisions. Health Strategies Group surveyed more than 1,800 treated patients—who all suffer from one of six chronic and acute conditions including arthritis/pain, depression, diabetes, elevated lipids, hypertension, and migraine—and found that first and foremost, consumers perceive themselves as people, not patients. What they want as people shapes their choice of drugs, their perception of the value of treatment, and their view of therapeutic success.

People, Not Patients

The survey found that when consumers embark on the process of obtaining or refilling prescriptions, their primary motiva-

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What Contributes To Consumers' Rx Valuation



decisions. What matters is not the amount of the copay, but the patient's expectation. When pharmacists request a co-pay amount that coincides with the consumer's expectations, only five percent discontinue therapy, even with copays as high as \$85. However, when consumers encounter unexpectedly high copays, twice as many patients (10 percent) end up not filling the prescription.

When measuring perceptions of their prescription's value, the study showed that consumers who are willing to pay high prices for a medication (the "willing-to-pay maximums") see more value in a drug than consumers who are willing to pay only low copays. On average, consumers are willing to pay more than their current copays for medications, in-

dicating that most consumers receive more value from their prescriptions than they currently pay for. In short, products that help people to forget they are patients are worth more to them.

"Co-pay Surprises"

When a patient goes to the pharmacy to fill a prescription, he or she will encounter a higher than expected co-pay, or "co-pay surprise," nearly 13 percent of the time. Eleven percent of those will fill the prescription. Conversely, of the 87 percent of patients who encounter the expected co-pay or a lower one, 86 percent fill the prescription.

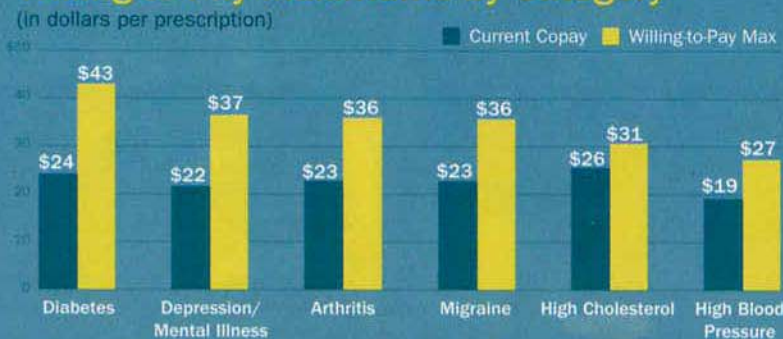
The growing prevalence of the three-tier health plan makes for more co-pay surprises, which means patients will be on the lookout for alternatives. This group, known as "cost switchers," are more likely to believe that an alternative therapy is better than their current one.

But even as co-pays continue to become more important for insured consumers, the factor that affects most consumers' drug decisions is their perception of efficacy, which accounts for more than 40 percent of consumer's decisions to switch products. Cost accounts for only five percent and awareness of an alternative medication accounts for one percent of the decision. (See "Seeking an Alternative," page 33.)

Opportunity Knocks

The increasing number of cost switchers in the marketplace creates more opportunity but requires additional responsibility from manufacturers. Product manufacturers can anticipate the need to build consumer perceptions of brand value by

Average Consumer Copays and Willing-to-Pay Maximums by Category*



*All differences significant at P<.05. SOURCE: Health Strategies Group, Inc., Consumer Rx Purchasing Study, 2003.

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communicating how their products contribute to a more fulfilling lifestyle among target groups. To accomplish this, brand teams need to develop consumer trust and reliability by doing the following:

Create educational support for physicians

Doctors need to know what matters to their patients. What do they value? What do they look for when seeking treatment for their disease? Eighty percent of consumers rely on their physician to tell them about appropriate drugs for their conditions, so it's important to educate doctors and their staff about what patients want.

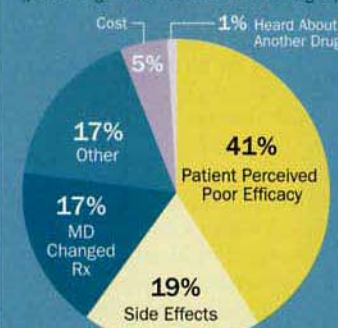
Create educational materials for patients Self-evaluation cards and informational material help consumers determine what they want out of their therapy. This also allows them to monitor the progress of their therapy and see if it is as effective as it should be.

Create brand value Design and deliver messaging to consumers that shows a brand's value. Positive messaging motivates patients to continue filling prescriptions.

Reducing noncompliance benefits everyone who is concerned about the pa-

Seeking an Alternative

Reasons for Changing Previous Rx for Specific Condition (percentage of consumers who changed)



SOURCE: Health Strategies Group, Inc., Consumer Rx Purchasing Study, 2003.

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tient. While physicians may naturally focus on symptoms and health metrics, attending to the emotional motivators for filling prescriptions improves compliance as it increases consumer satisfaction. 10