

**GREENBERG QUINLAN ROSNER**

STRATEGY + RESEARCH

# Medication Adherence Campaign

**Target Market Tracking Survey Results**

National Consumers League

October 9, 2015

CAMPAIGNS | CORPORATIONS | ADVOCACY | WORLDWIDE

# Objectives

- An initial target market survey was launched in May 2011 to serve as a benchmark for measuring the impact, over time, of the “Script Your Future” campaign. The campaign objective is to increase awareness of the importance of medication adherence.
- A tracking survey of patients in the target markets was conducted in October 2013 to assess any movement at the midpoint of the campaign.
- The current survey was conducted in May 2015 to mark the completion of Phase One of the “Script Your Future” campaign. The survey’s intended goals include:
  - to explore the attitudes and practices of patients regarding prescription medications.
  - to assess the current perceptions of communications between Americans who take medication and the health care professionals who provide those medications.

# Methodology

- Target Market Survey Methodology
  - Telephone Survey, with numbers generated by random digit dialing,
    - 66% landline
    - 34% cell phone
  - Sample Composition
    - Adults over the age of 18 (n=2200)
    - Approximately 300 interviews in the 6 targeted media markets: Baltimore, MD; Birmingham, AL; Cincinnati, OH; Providence, RI; Raleigh-Durham, NC; and Sacramento, CA. Columbus, OH was used as a control (n=400).
  - Age Composition
    - 18-29 – 16% Target Markets, 16% Control Market
    - 30-39 – 16% Target Markets, 14% Control Market
    - 40-49 – 18% Target Markets, 20% Control Market
    - 50-64 – 27% Target Markets, 26% Control Market
    - 65+ - 21% Target Markets, 22% Control Market

- Target Market Survey Methodology Continued

- The survey was conducted May 19-31, 2015.
- The target markets (n=1800) have a margin of error of +/- 2.31 percentage points. Results within each individual market (n=300) have a +/- 5.66 percentage point margin of error; results within the control market (n=400) have a +/- 4.90 percentage point margin of error. Subgroups within the target market universe are subject to larger margins of error based on their sample sizes.
- In the target markets there are 1054 respondents labelled “chronic,” margin of error among that group is +/- 3.02 percent.
- 202,839 calls were made, reaching 115,461 eligible phones to achieve 2,200 completed interviews and 470 incomplete interviews, for a response rate of 1.3 percent overall.

# Notes on the Presentation

- These results reflect weighted numbers that are representative of the adult population in each of the target and control market universes.
  - The data was balanced on gender, age, and ethnicity variables within each individual market to ensure that the universes were representative of the adult population within each geography.
- Respondents are defined as having a “chronic condition” if they respond that a doctor has told them that they have a specific condition, and that they are “taking or supposed to be taking” at least one medication for that condition.

# Summary of Key Findings

- Americans who take medications continue to report a strong awareness and acceptance of the importance of adhering to their medications.
  - More than three-quarters of Americans indicate that it is extremely important (rating 5 on a 1-5 scale) to take medicine exactly as directed; this has held steady from 2011 until now.
  - Levels of reported adherence among people with chronic conditions steady throughout the “Script Your Future” campaign in target markets.
  - Those who report increased communications are more likely to have a stronger understanding of the importance of taking medications as prescribed and are more likely to report managing medications better.
- Nearly 1-out-of-5 people taking medications in the target markets say they are taking their medicines better than they were a year ago, significantly higher than in the control market

# Summary of Key Findings

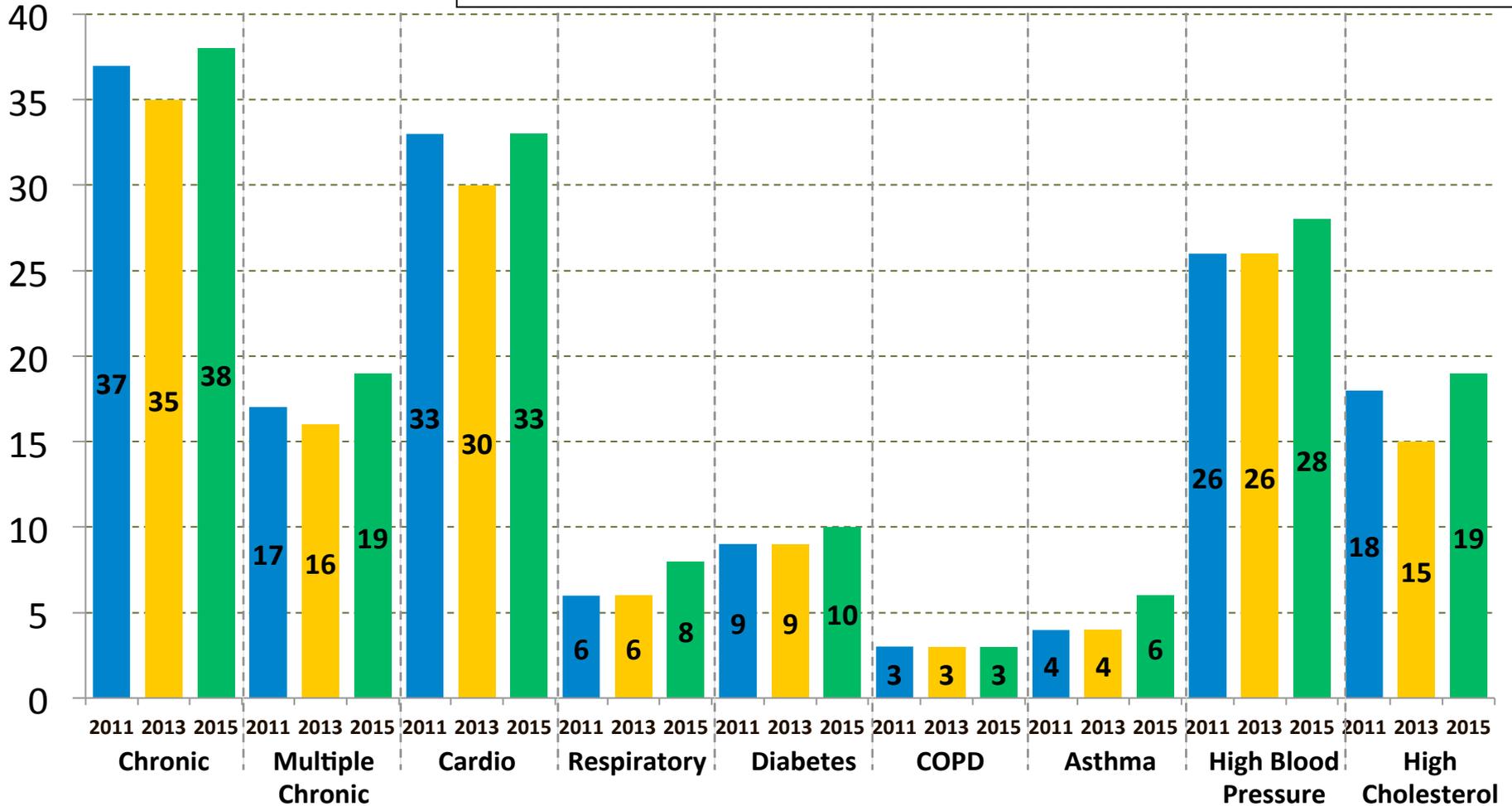
- The link between adherence and communications emerged as important early on in the campaign and continues to be crucial; those who report taking medications better than a year ago also are more likely to experience increased communications by health care professionals over the same time period; those who report a worse job taking medications say they had seen decreased communications .
- The change in communications between pharmacists and people taking medications has been particularly notable.
  - At the start of the campaign, half of those people taking medications in target markets said their pharmacists “never” asked about problems taking medicines. That figure has now dropped to 43 percent.
  - Every individual target market except Sacramento has seen increases in the number of people taking medications who say their pharmacists ask about problems taking medicines “every time” or “occasionally.”

# Summary of Key Findings

- Americans respond positively to tools that can help them adhere to medications. In particular, they see conversations with health care professionals, question lists and medicine charts as helpful, as well as tools that increase convenience like coordination of refills and packaging that organizes medications in appropriate doses.

# Prevalence of chronic conditions among adults in target markets (ages 18 and over)

*The total prevalence of chronic conditions is lower than the sum of individual chronic conditions because many respondents have multiple chronic conditions*



Base: all respondents in target markets (n=1800)

# Medication Adherence

## Americans who take medications continue to report a strong awareness and acceptance of the importance of adhering to their medications

*Q.30-35: I am going to read some more statements about prescription medicines and please tell me if you strongly agree, agree, disagree or strongly disagree with the statement.*

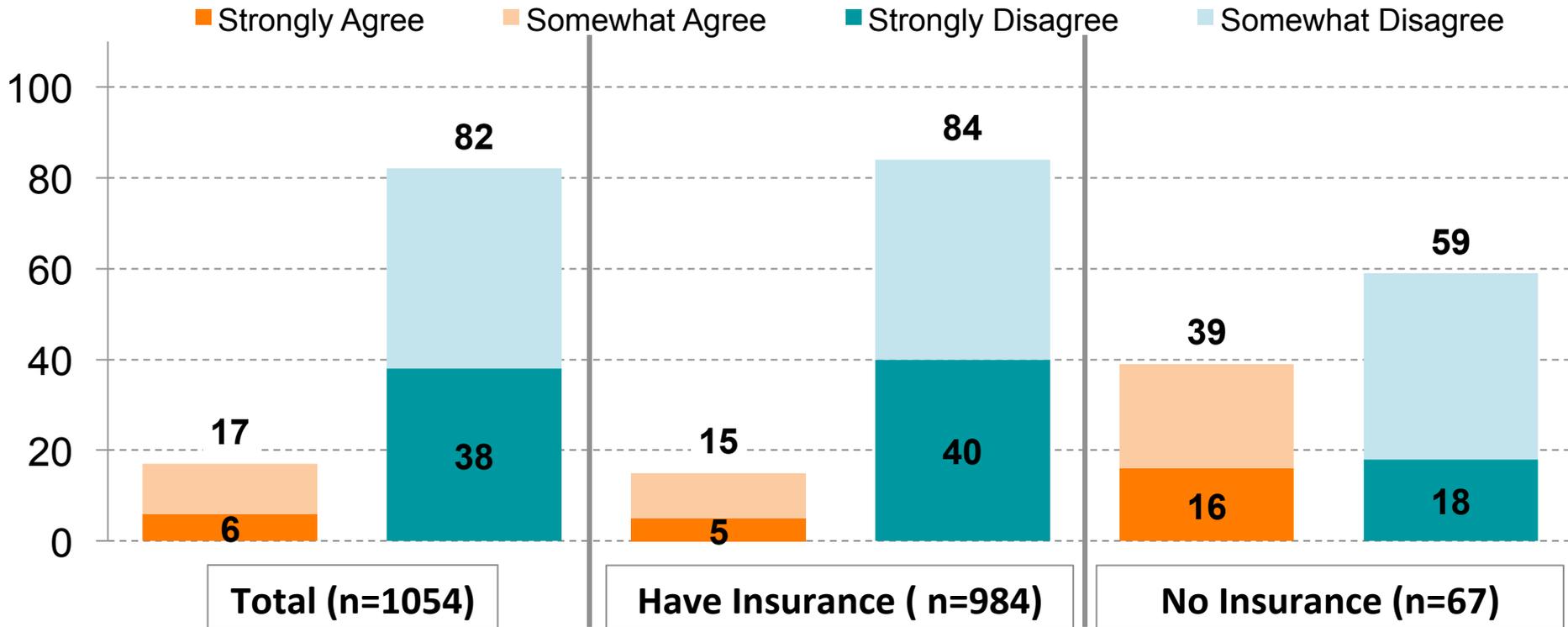
	<b>2011 % Strongly Agree</b>	<b>2013 % Strongly Agree</b>	<b>2015% Strongly Agree</b>
I am convinced that it is important for me to take my medicine.	58%	60%	55%
I understand what will happen to my health if I do not take my medicine exactly as prescribed.	52%	51%	49%
My doctor, nurse, or pharmacist has fully explained what will happen to my health if I do not take my medicine as prescribed.	45%	47%	40%
The out of pocket costs of my medicines has prevented me from filling or refilling prescriptions in the last 6 months.	7%	8%	6%
Sometimes I worry that my prescribed medicine will do more harm than good to me.	n/a	8%	8%

Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Respondents without insurance are twice as likely to agree that out of pocket costs of medicine have prevented them from filling prescriptions

Q.30 I am going to read some more statements about prescription medicines and please tell me if you strongly agree, agree, disagree or strongly disagree with the statement.

***The out of pocket cost of my medicines has prevented me from filling or refilling prescriptions in the last 6 months.***



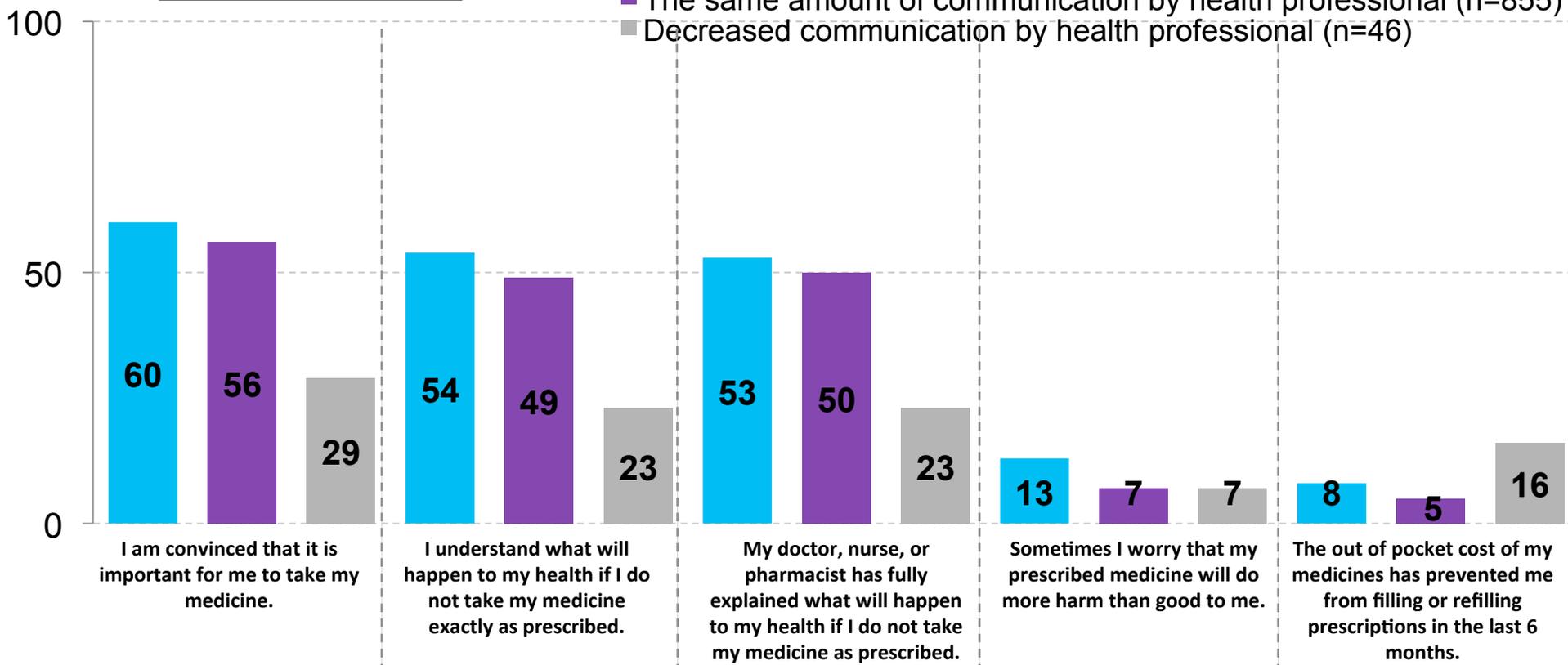
Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Those who report continued communication with health professionals also most likely to report an understanding of the importance of adhering to their medications

Q.30-35: I am going to read some more statements about prescription medicines and please tell me if you strongly agree, agree, disagree or strongly disagree with the statement.

**% STRONGLY AGREE**

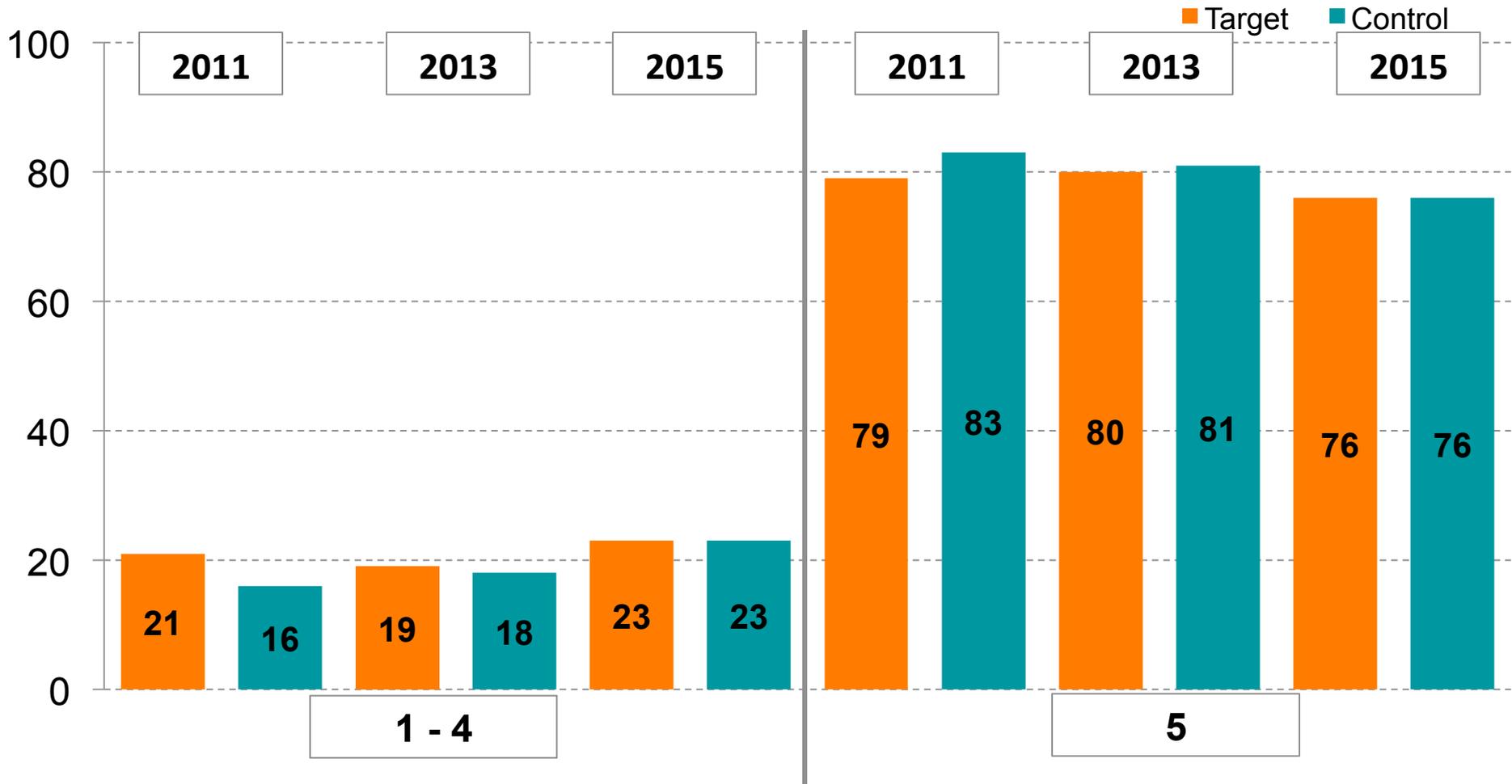
- Increased communication by health professional (n=140)
- The same amount of communication by health professional (n=855)
- Decreased communication by health professional (n=46)



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Steady belief in importance of taking medications as prescribed

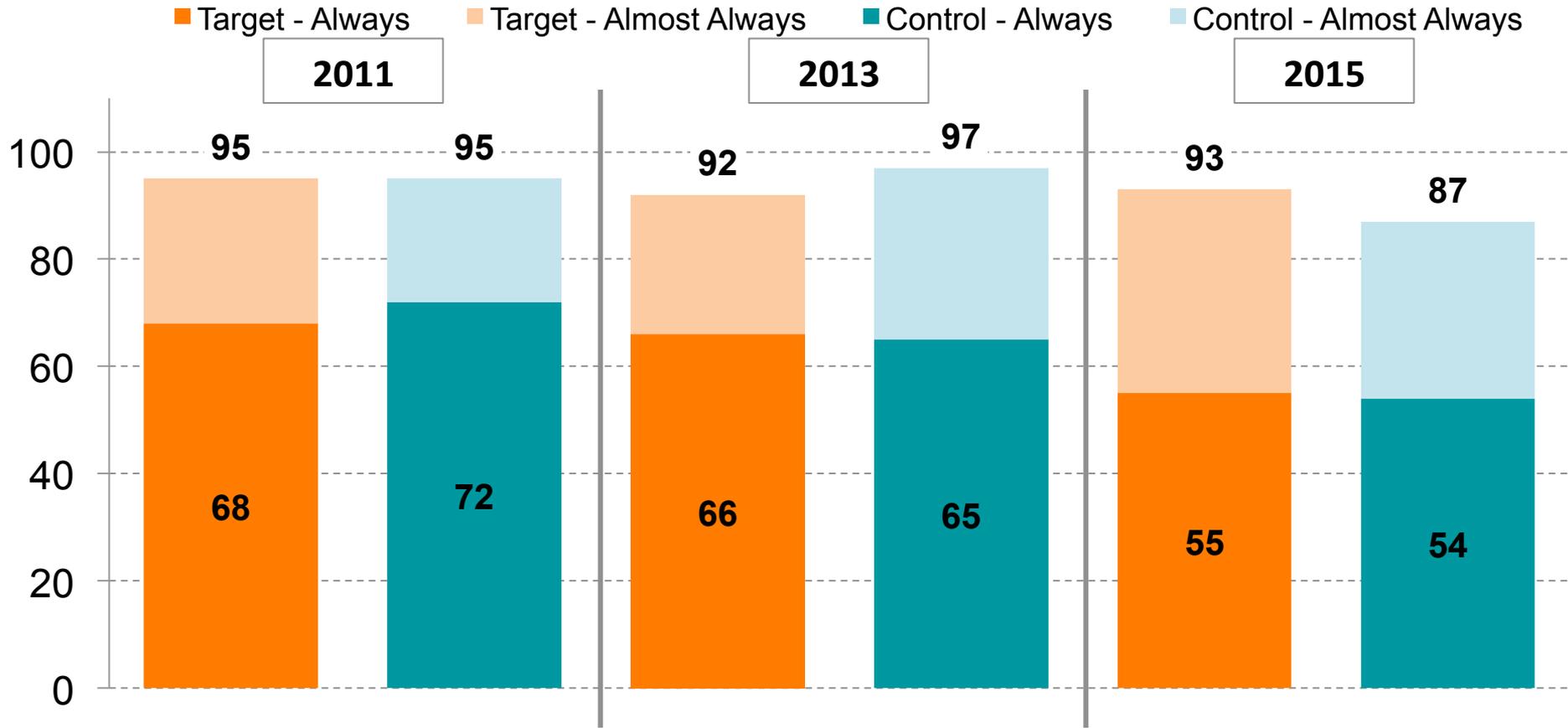
Q.17: On a scale of 1 to 5, where 1 is not at all important and 5 is extremely important, how important do you think it is for you, personally, to take medicine exactly as instructed by your doctor, nurse or pharmacist?



Base: all respondents in target markets (n=1800), control market (n=400)

# Reported adherence to medications steady throughout campaign, though with slightly less intensity in 2015

*Q.18: Sometimes people do not take their medicine exactly as instructed by their doctor, nurse or pharmacist. How about you? In general, how often do you take your medicine exactly as instructed: always, almost always, sometimes, rarely or never?*

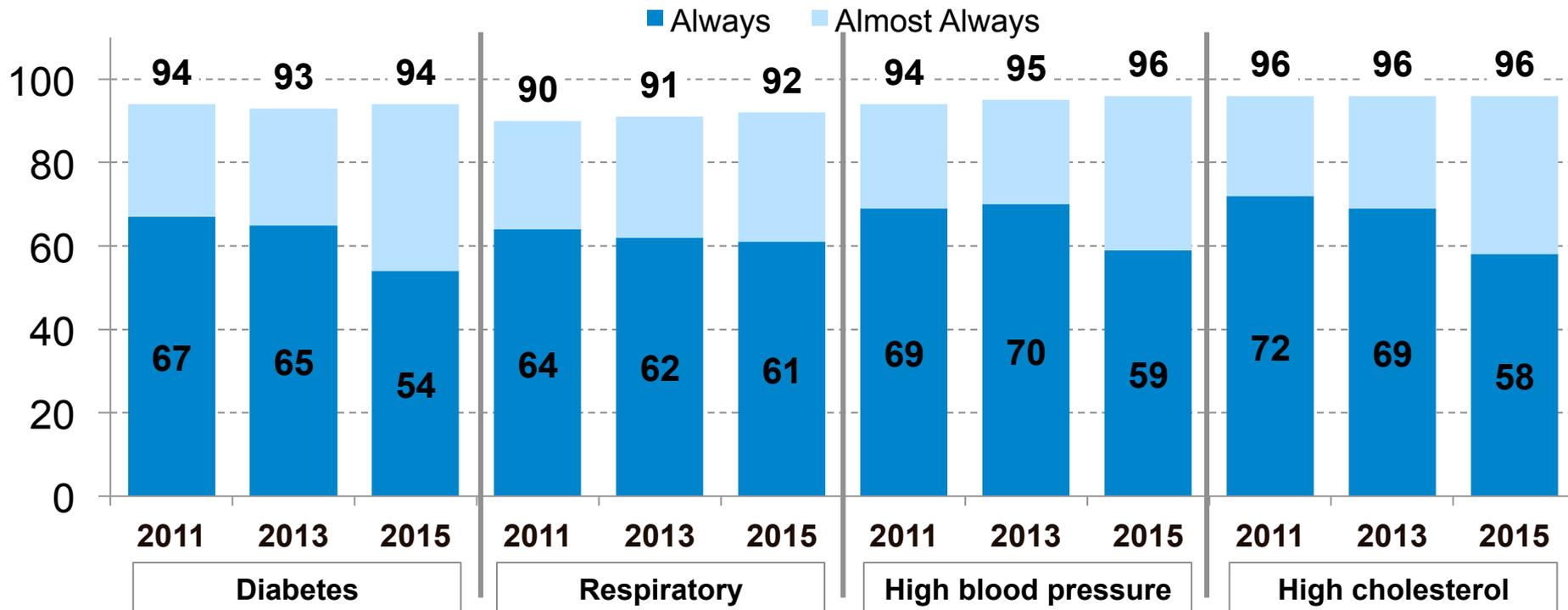


Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

## Levels of adherence also remain steady within specific conditions

*Q.18: Sometimes people do not take their medicine exactly as instructed by their doctor, nurse or pharmacist. How about you? In general, how often do you take your medicine exactly as instructed: always, almost always, sometimes, rarely or never?*

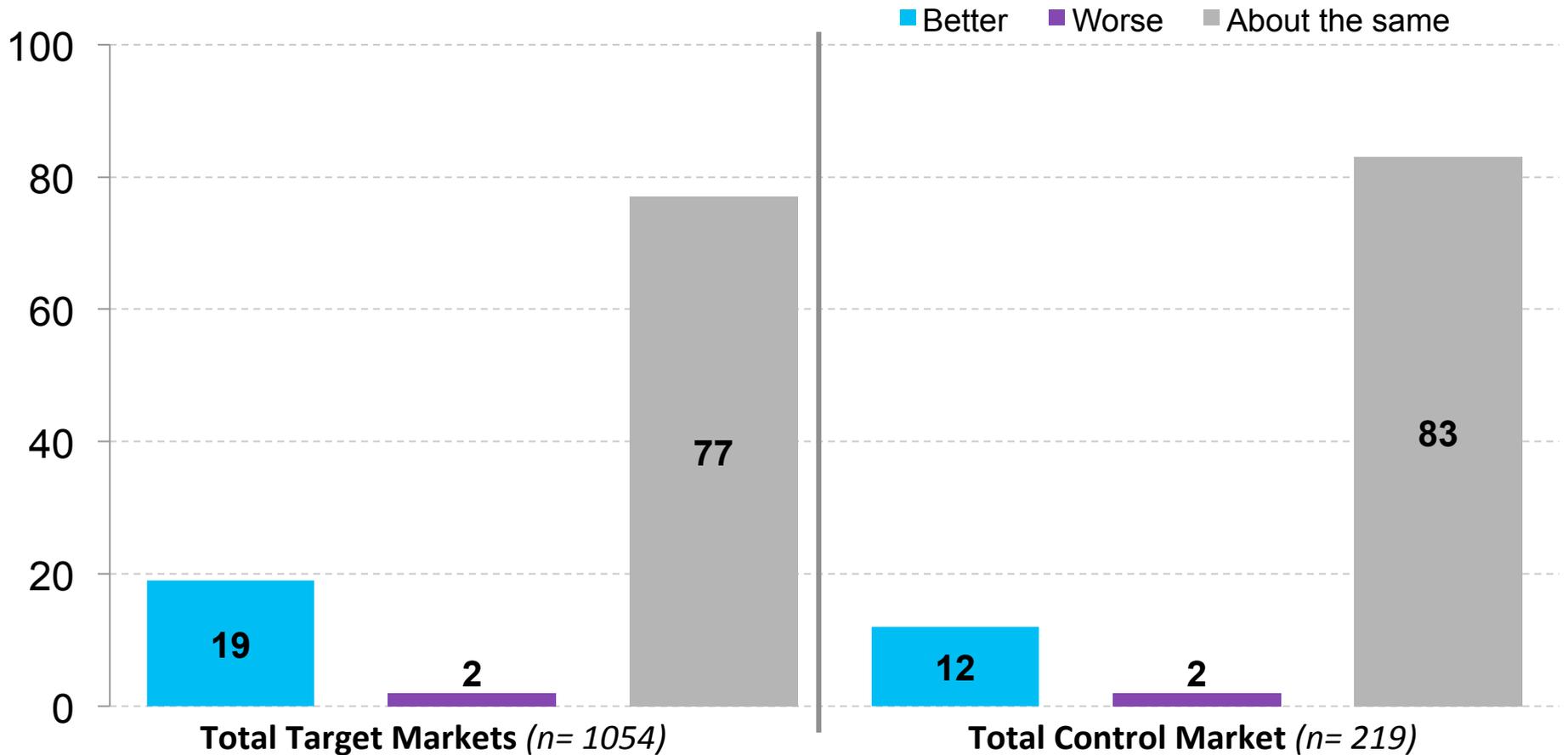
**% responding “always” or “almost always” take medications as directed**



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# People in target markets who take medications report managing their medicines significantly better than a year ago compared to the control market

*Q.19: Compared to a year ago, how good of a job are you doing taking your medicine as directed by your doctor, pharmacist or other health care professional -- better than you were a year ago, worse than you were a year ago, or about the same as a year ago?*



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# One in five of those taking medications report managing medications better than one year ago across markets; target markets report better results than control market

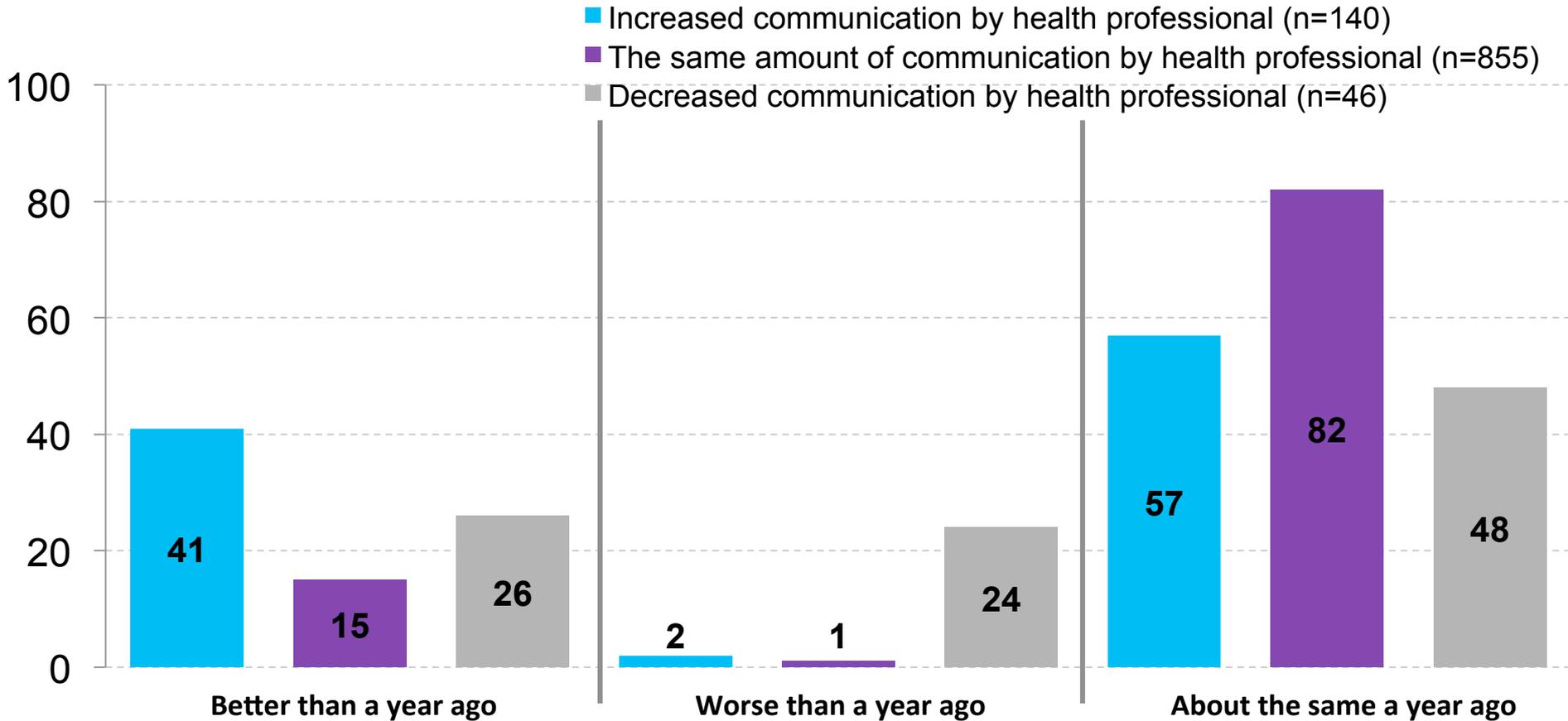
*Q.19: Compared to a year ago, how good of a job are you doing taking your medicine as directed by your doctor, pharmacist or other health care professional -- better than you were a year ago, worse than you were a year ago, or about the same as a year ago?*

	<b>Better than a year ago</b>	<b>Worse than a year ago</b>	<b>About the same</b>
Total (n=1054)	19%	2%	77%
Control (n=219)	12%	2%	83%
Baltimore (n=175)	25%	2%	71%
Birmingham (n=198)	19%	1%	80%
Cincinnati (n=173)	17%	3%	80%
Providence (n=184)	18%	4%	76%
Raleigh (n=164)	17%	3%	79%
Sacramento (n=160)	18%	3%	77%

Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Those who report decreased communication by health care professionals also report managing their medicines worse than a year ago

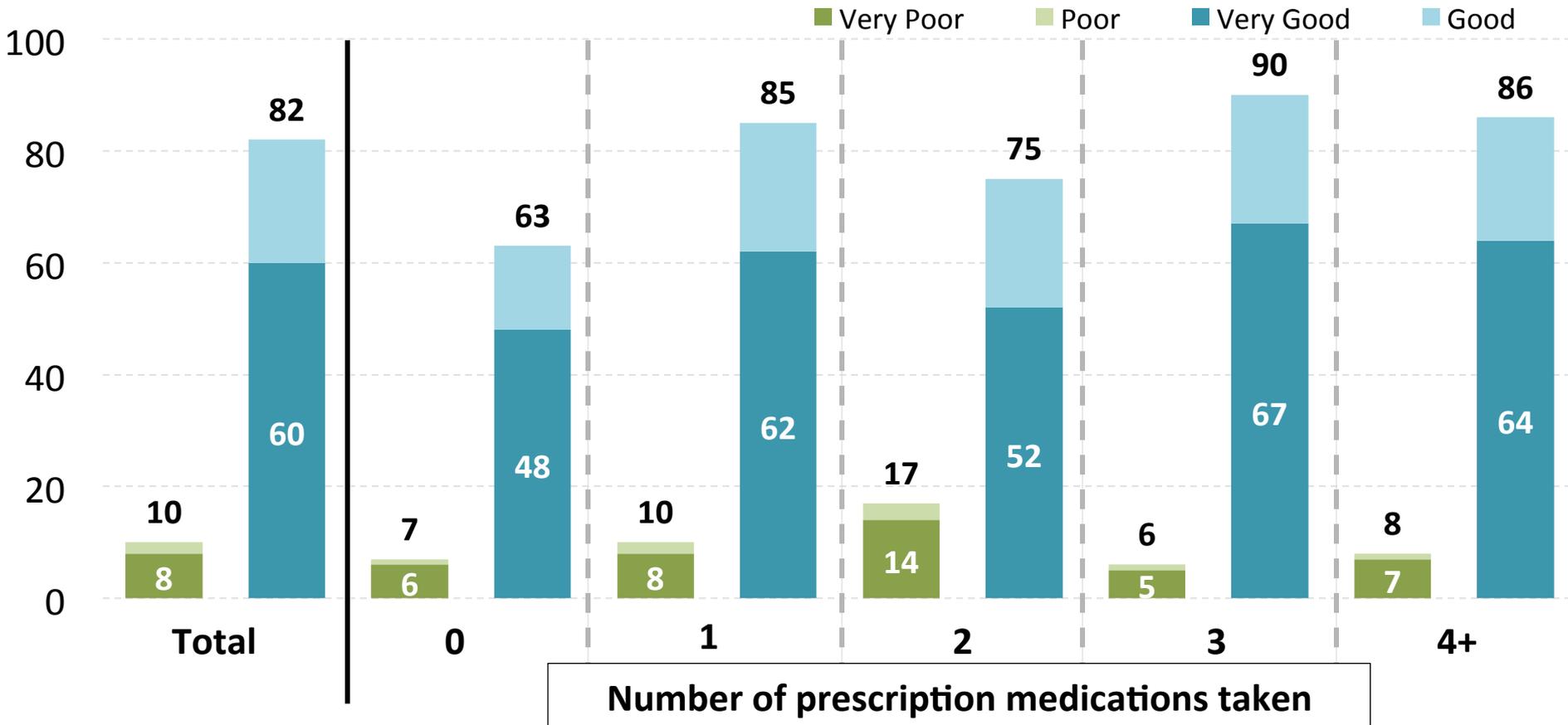
*Q.19: Compared to a year ago, how good of a job are you doing taking your medicine as directed by your doctor, pharmacist or other health care professional -- better than you were a year ago, worse than you were a year ago, or about the same as a year ago?*



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Americans taking multiple medications report strong adherence in the past 30 days

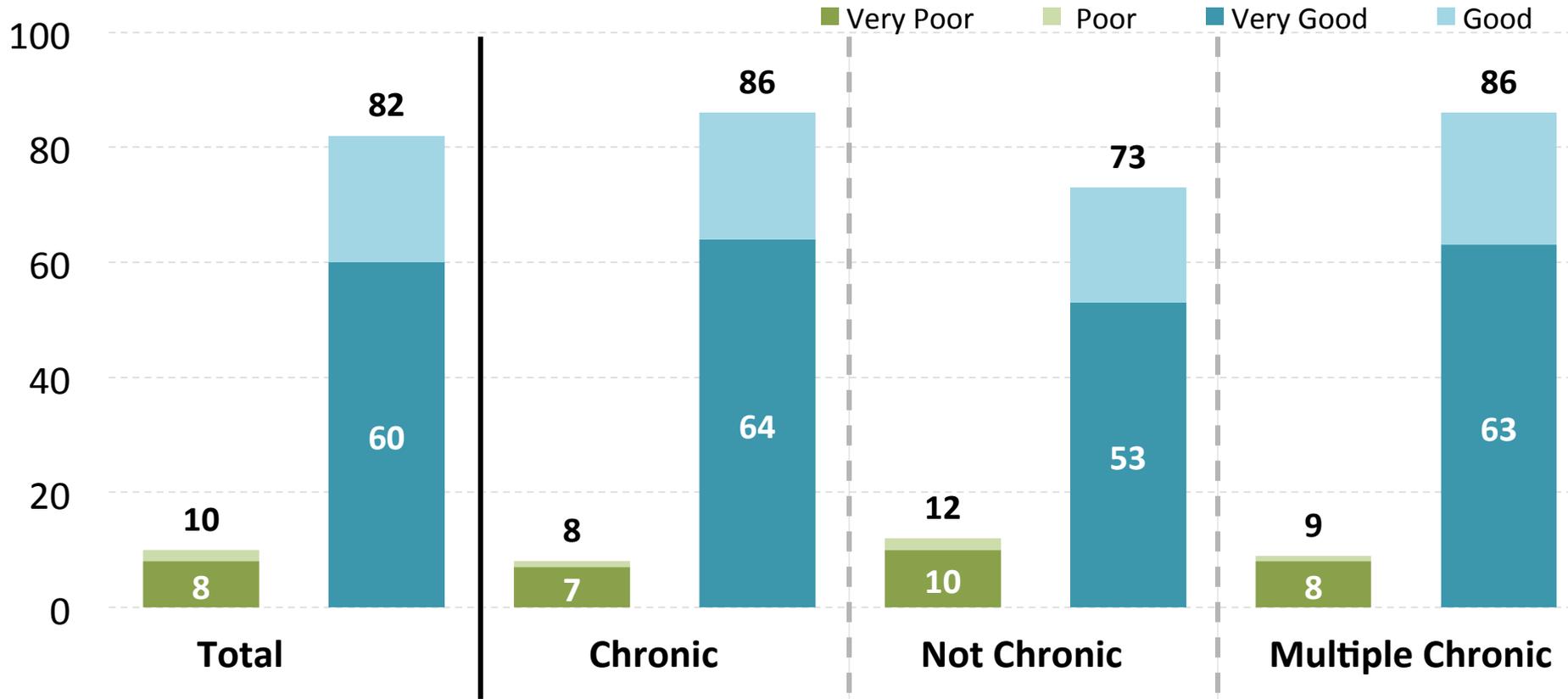
Q.20: In the last 30 days, how good of a job did you do at taking your medicine in the way you were directed to by your doctor, pharmacist or other health care professional -- very poor, poor, fair, good, or very good?



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Individuals with chronic conditions report they had done a “very good” job with taking their medicine in the past 30 days

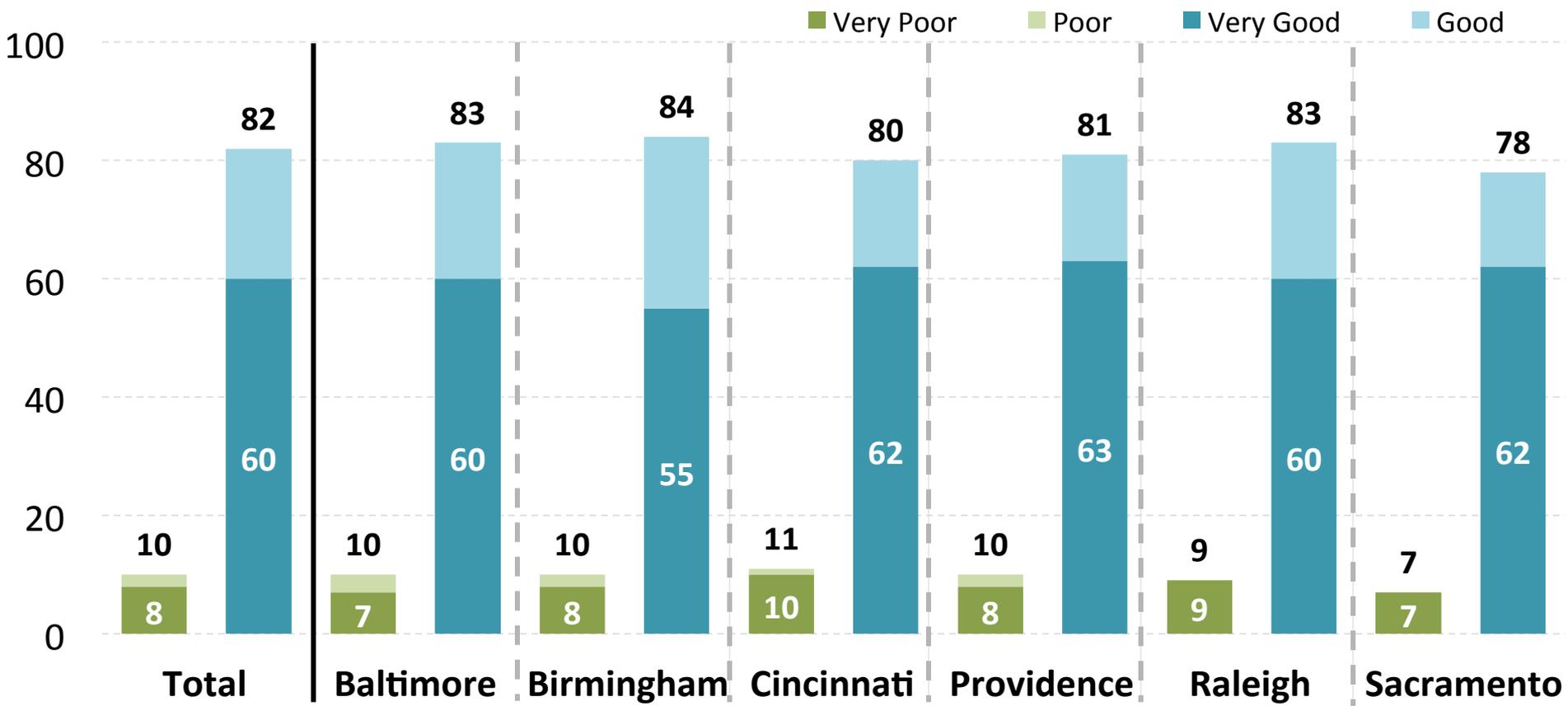
*Q.20: In the last 30 days, how good of a job did you do at taking your medicine in the way you were directed to by your doctor, pharmacist or other health care professional -- very poor, poor, fair, good, or very good?*



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

In each of the target markets, majorities report doing a “very good” job with taking their medicine as directed over the past month

Q.20: In the last 30 days, how good of a job did you do at taking your medicine in the way you were directed to by your doctor, pharmacist or other health care professional -- very poor, poor, fair, good, or very good?

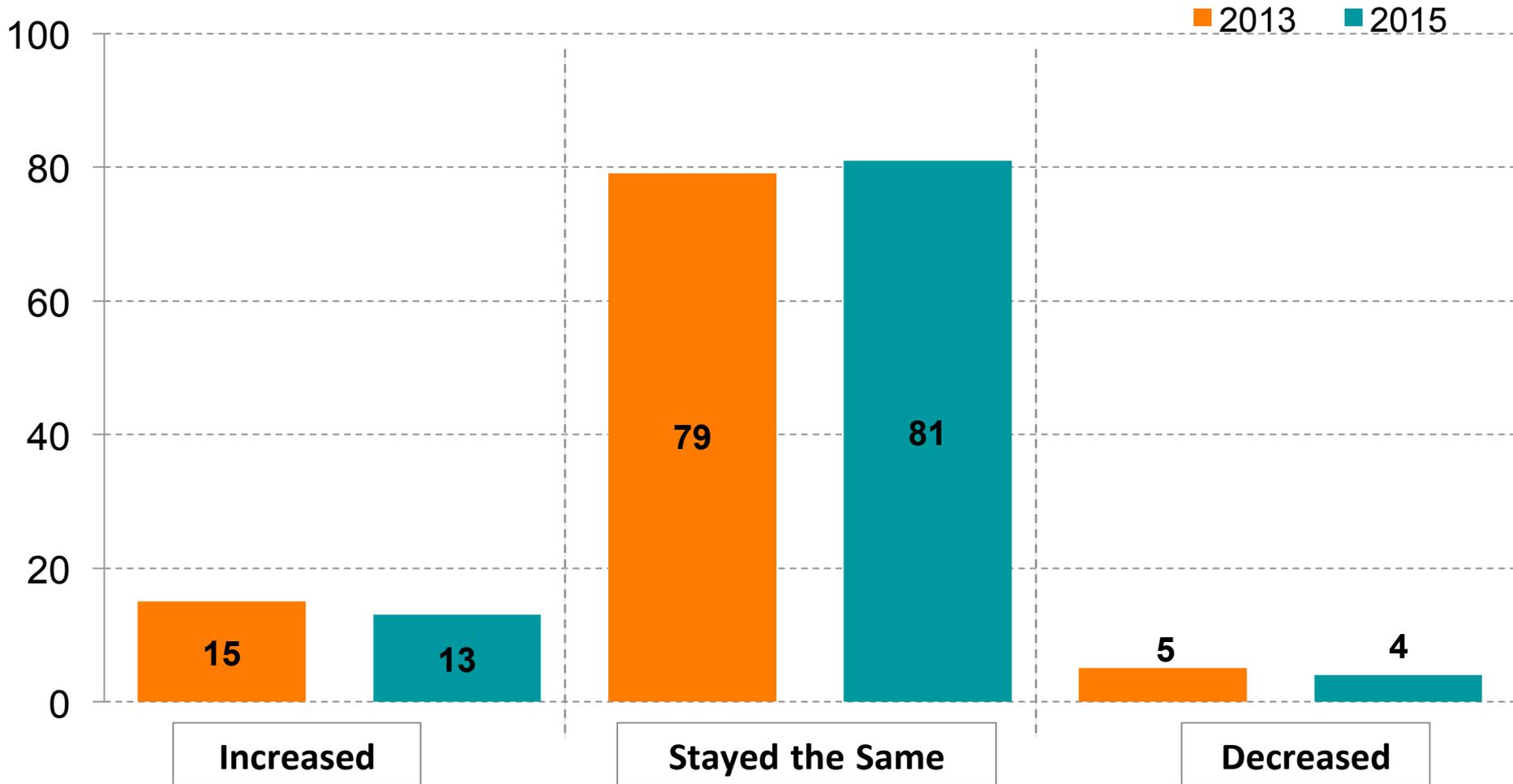


Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Communications

## Continued movement toward increased rather than decreased communications

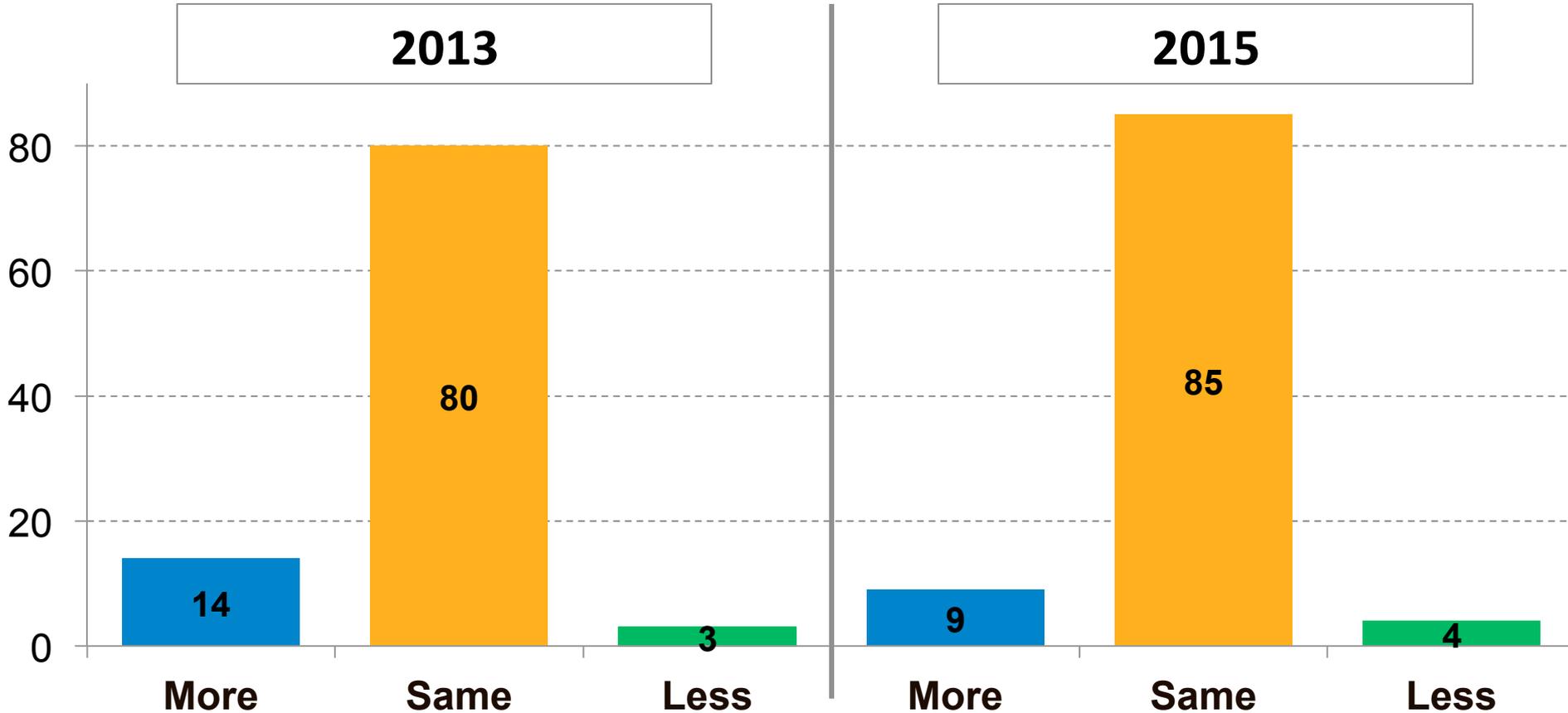
Q.36: Compared to a year ago, has the communication with your doctor, pharmacist, nurse or other health care professional about your medicines: Increased, decreased, or stayed the same?



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

## People who take medications more likely to experience more communication from doctors rather than less

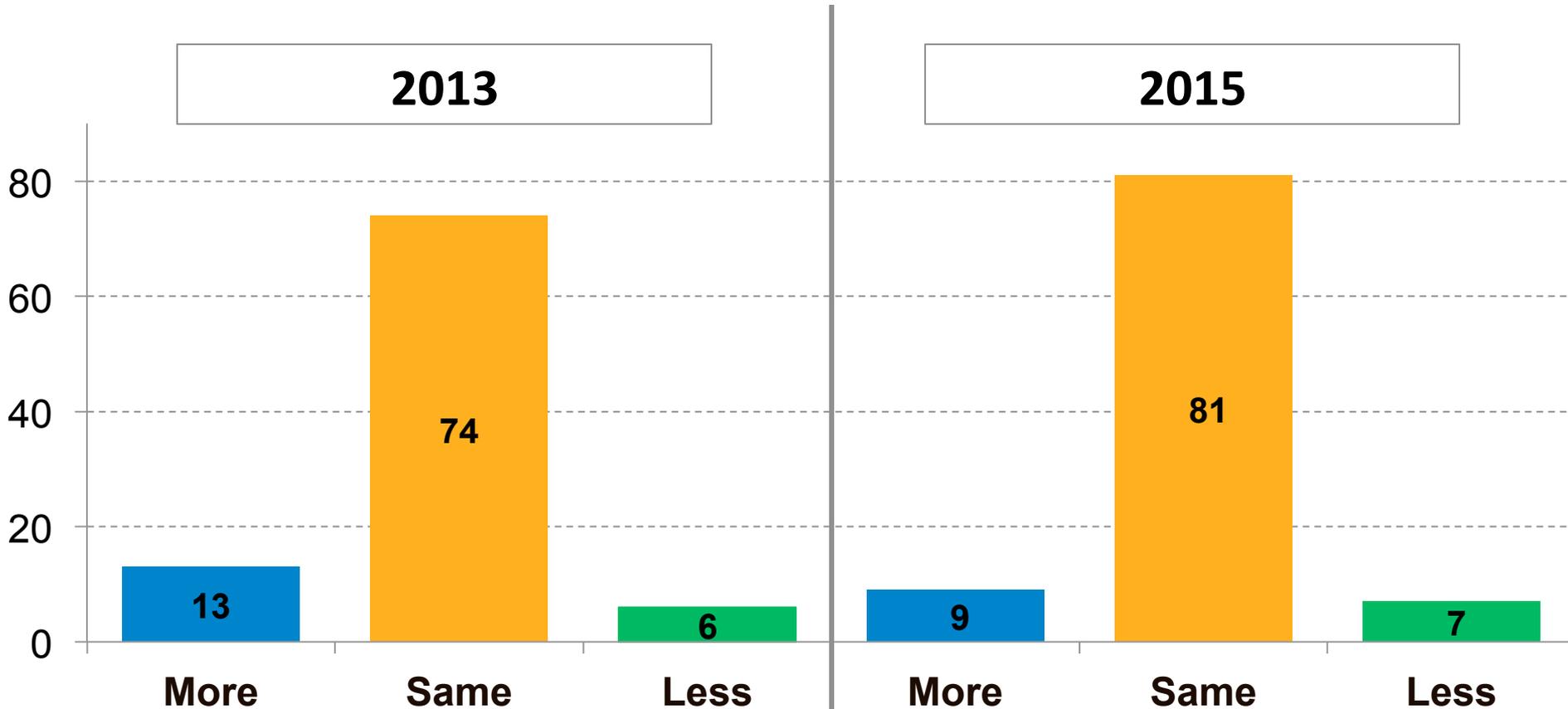
Q.37/38: Compared to a year ago, do you feel that your **DOCTOR** personally explains what your medicine does and how it helps you more than they did a year ago, less than they did a year ago, or about the same amount?



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

## People who take medications more likely to experience more communication from pharmacists rather than less

Q.37/38: Compared to a year ago, do you feel that your **PHARMACIST** personally explains what your medicine does and how it helps you more than they did a year ago, less than they did a year ago, or about the same amount?



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

Compared to a year ago individuals taking medications report that doctors and pharmacists are more likely to personally communicate about their medications; Hispanics report greater increase

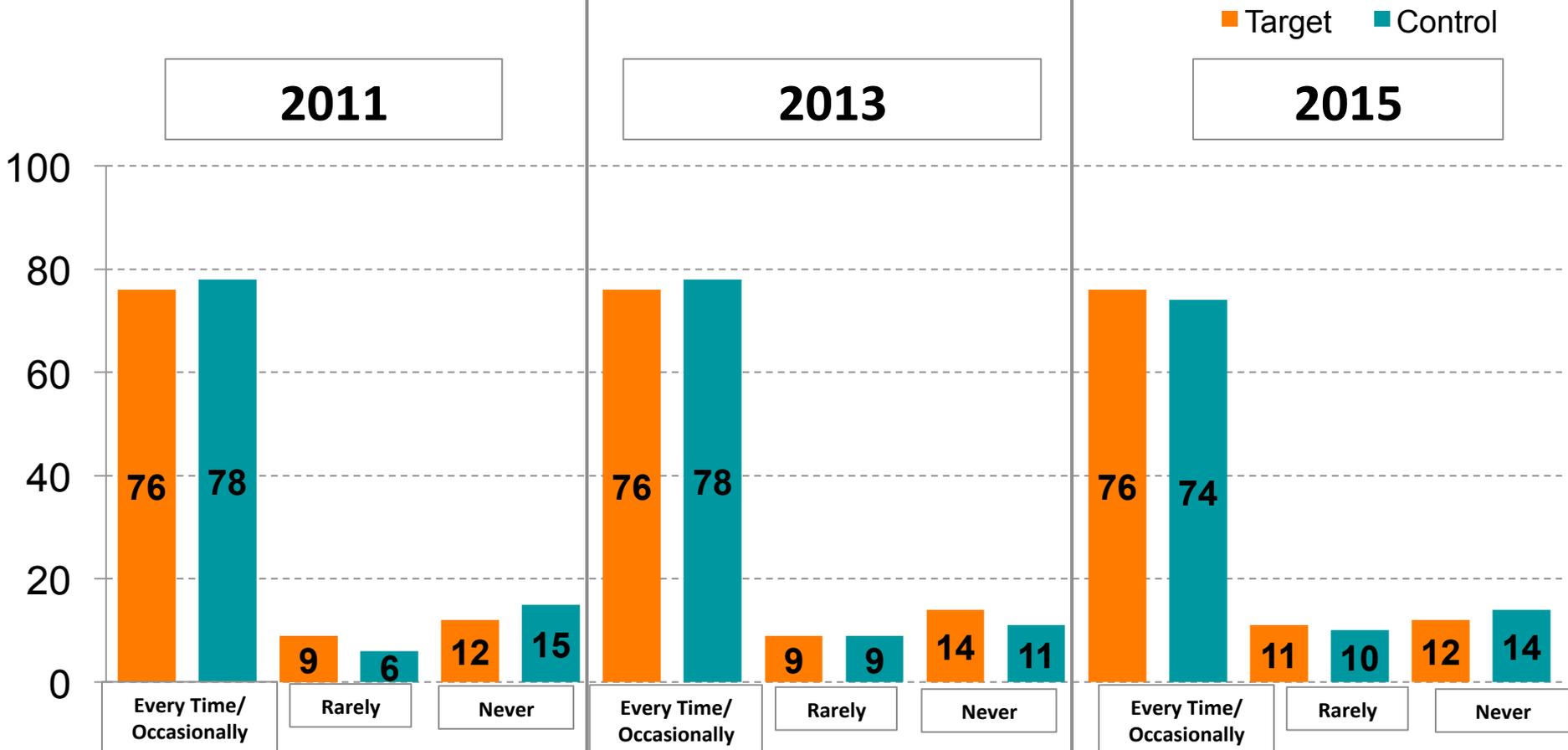
*Q.37/38: Compared to a year ago, do you feel that your DOCTOR/PHARMACIST personally explains what your medicine does and how it helps you more than they did a year ago, less than they did a year ago, or about the same amount?*

	Doctors			Pharmacists		
	More	Less	Same	More	Less	Same
<b>Diabetes (n=174)</b>	13%	5%	80%	10%	6%	80%
<b>High blood pressure (n=500)</b>	10%	4%	85%	9%	5%	83%
<b>High cholesterol (n=344)</b>	8%	4%	86%	8%	5%	83%
<hr/>						
<b>White (n=724)</b>	9%	4%	86%	8%	7%	81%
<b>Black (n=211)</b>	10%	3%	85%	6%	4%	88%
<b>Hispanic (n=65)</b>	13%	10%	77%	17%	13%	69%

Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# People who take medications report that doctors continue to ask about problems with medication during visits

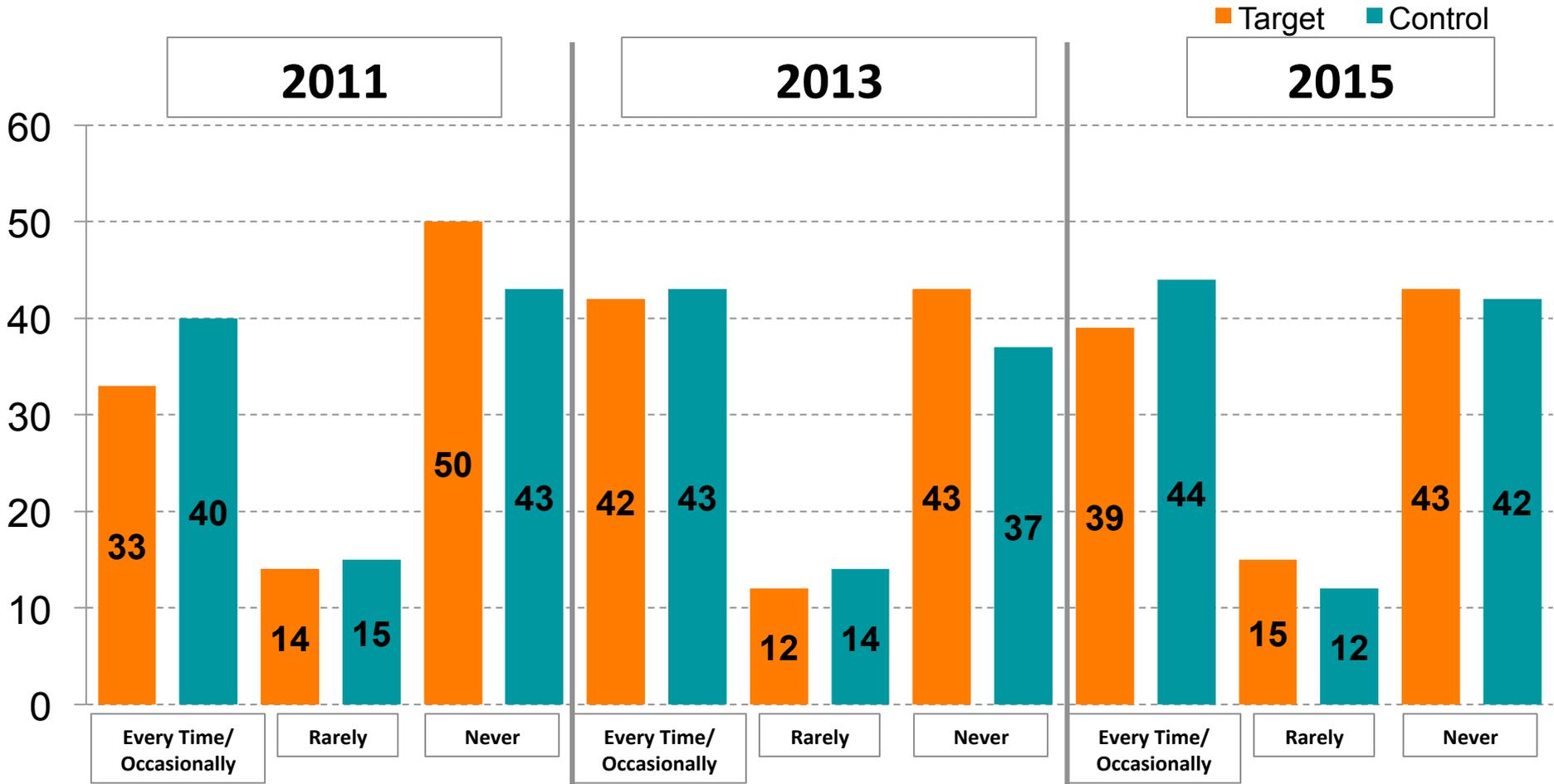
Q.39: How often does your DOCTOR ask if you are having any problems taking your medicine – every time you see your doctor, occasionally, rarely, or never?



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054 target markets; n=219 control markets)

Increase in pharmacist communication over course of campaign: increase in those who say pharmacist asks every time, decrease in those who say their pharmacist “never” asks about

problems with medications  
 How often do you think your PHARMACIST ask if you are having any problems taking your medicine - every time you pick up a prescription, occasionally, rarely, or never?

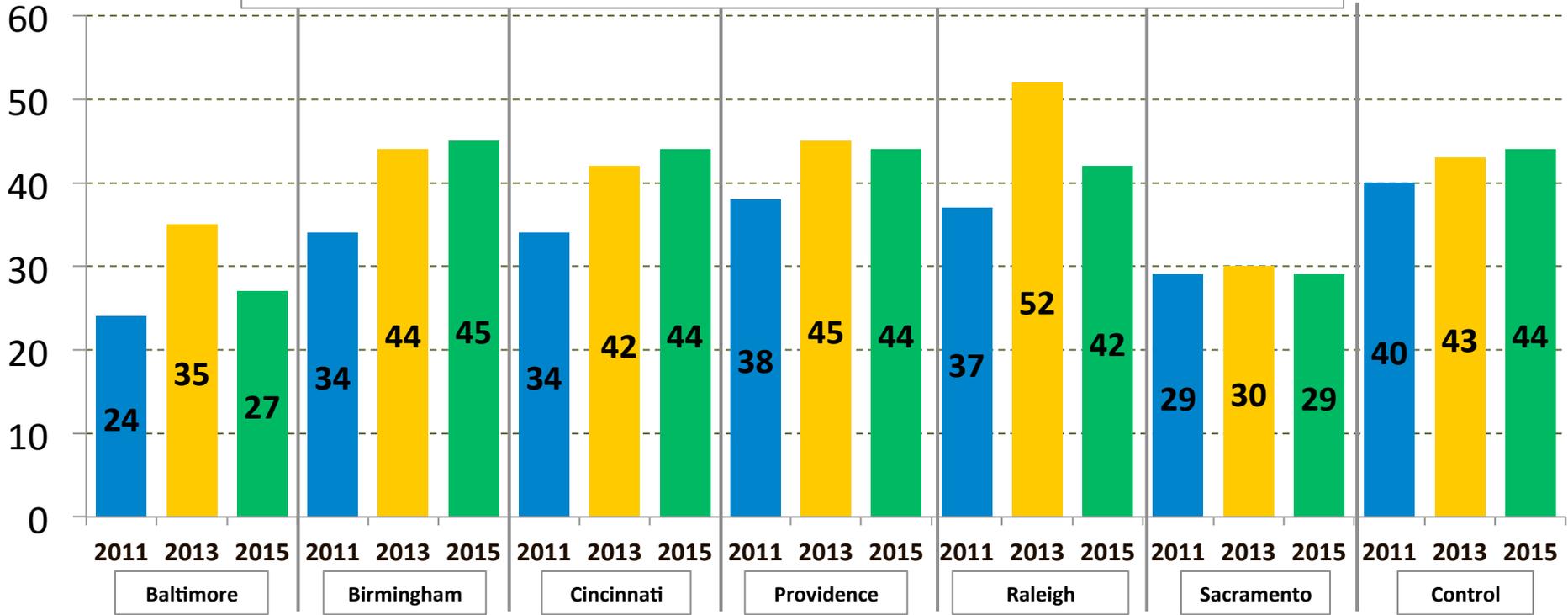


Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054 target markets; n=219 control markets)

In nearly every target market, those taking medications report pharmacists are now more likely than at campaign's inception to ask about problems with medications

*How often does your PHARMACIST ask if you are having any problems taking your medicine - every time you pick up a prescription, occasionally, rarely, or never?*

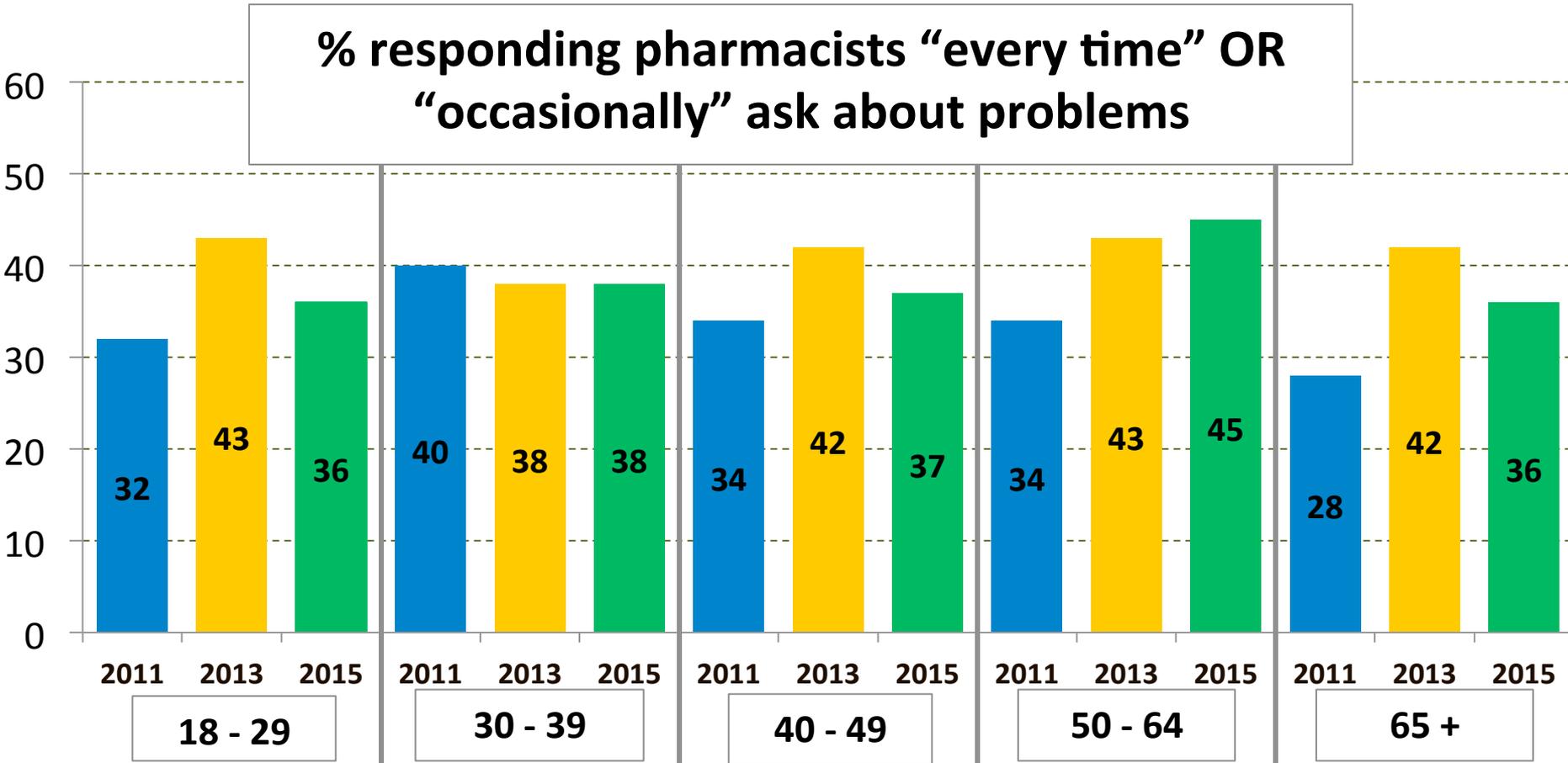
**% responding pharmacists “every time” OR “occasionally” ask about problems**



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

People who take medications report that pharmacists are now more likely to ask about problems with medications across age groups; but smaller increases among younger age groups

Q.40: How often does your PHARMACIST ask if you are having any problems taking your medicine - every time you pick up a prescription, occasionally, rarely, or never?



Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Over half (52%) of respondents in Sacramento cite receiving their medications from places other than traditional pharmacies

Q.16: Which of the following do you use to get your prescription medicines?

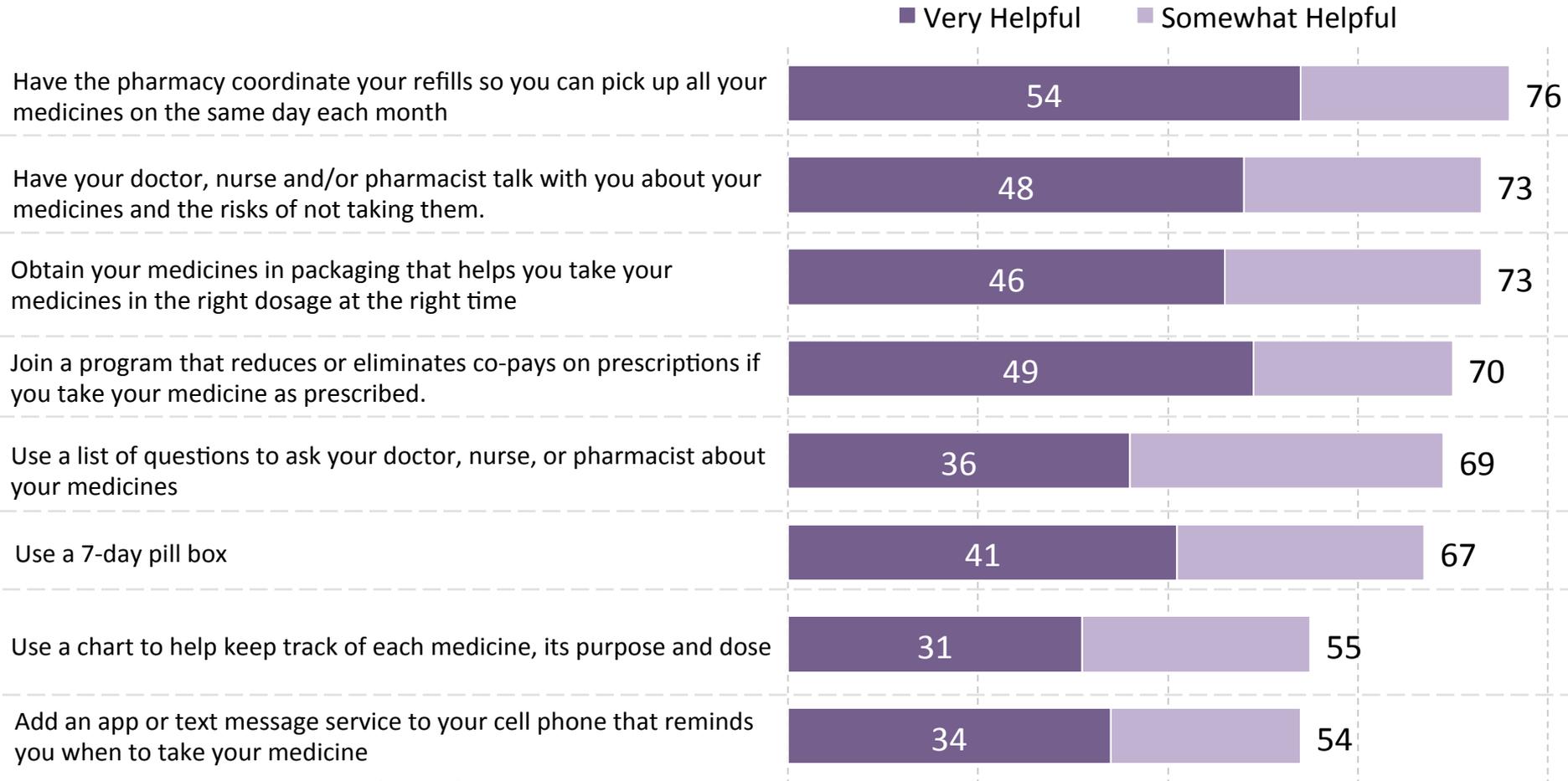
	Drug Store	Big Box Store	Mail Order	Grocery Store	Other
Total (n=1054)	66%	21%	19%	17%	12%
Control (n=219)	52%	37%	29%	26%	8%
Baltimore (n=175)	64%	17%	21%	25%	11%
Birmingham (n=198)	74%	25%	11%	14%	9%
Cincinnati (n=173)	55%	22%	26%	34%	8%
Providence (n=184)	73%	14%	16%	6%	11%
Raleigh (n=164)	73%	28%	13%	10%	12%
Sacramento (n=160)	58%	17%	29%	13%	23%

Base: respondents in target market with a chronic condition taking or supposed to be taking a prescribed medication and respondents who have been prescribed medication within the last 6 months (n=1054)

# Tools

# Americans say the most helpful tools center on convenience and personal communication with health care professionals

Q.41-48: A lot of people need help reminding them when to take their medicine and how to take their medicine correctly. I am going to read you a list of tools some people use or things that can be done to help people take their medicine. Thinking specifically about yourself, please tell me whether each of these would be very helpful, somewhat helpful, not very helpful or not at all helpful.



Base: all respondents in target markets (n=1800)

# Americans view conversations with health care professionals and preparing questions for doctors, nurses, and pharmacists among most helpful tools for improving adherence

*Q.41-47: A lot of people need help reminding them when to take their medicine and how to take their medicine correctly. I am going to read you a list of tools some people use or things that can be done to help people take their medicine. Thinking specifically about yourself, please tell me whether each of these would be very helpful, somewhat helpful, not very helpful or not at all helpful.*

<b>% Responding “Helpful”</b>	<b>2011</b>	<b>2013</b>	<b>2015</b>
Have your doctor, nurse and/or pharmacist talk with you about your medicines and the risks of not taking them	n/a	75%	73%
Write a list of questions to ask your doctor, nurse, or pharmacist about your medicines	75%	70%	69%
Use a chart to help keep track of each medicine, its purpose and dose	51%	56%	55%
Add an app or text message service to your cell phone that reminds you when to take your medicine.	43%	50%	54%

Base: all respondents in target markets (n=1800)

## Caregivers more likely to recognize communication and convenience as helpful tools for adherence.

*Q.41-47: A lot of people need help reminding them when to take their medicine and how to take their medicine correctly. I am going to read you a list of tools some people use or things that can be done to help people take their medicine. Thinking specifically about yourself, please tell me whether each of these would be very helpful, somewhat helpful, not very helpful or not at all helpful.*

% Responding “Helpful”	Caregivers	Not a Caregiver
	(n=330)	(n=1452)
Have the pharmacy coordinate your refills so you can pick up all your medicines on the same day each month	84%	75%
Write a list of questions to ask your doctor, nurse, or pharmacist about your medicines	77%	68%
Obtain your medicines in packaging that helps you take your medicines in the right dosage at the right time	77%	73%
Join a program that reduces or eliminates co-pays on prescriptions if you take your medicine as prescribed	76%	70%
Have your doctor, nurse and/or pharmacist talk with you about your medicines and the risks of not taking them	75%	72%
Use a 7-day pill box	70%	66%
Use a chart to help keep track of each medicine, its purpose and dose	63%	54%
Add an app or text message service to your cell phone that reminds you when to take your medicine.	54%	54%

Base: all respondents in target markets (n=1800)

## Greater enthusiasm for the various tools among minority populations

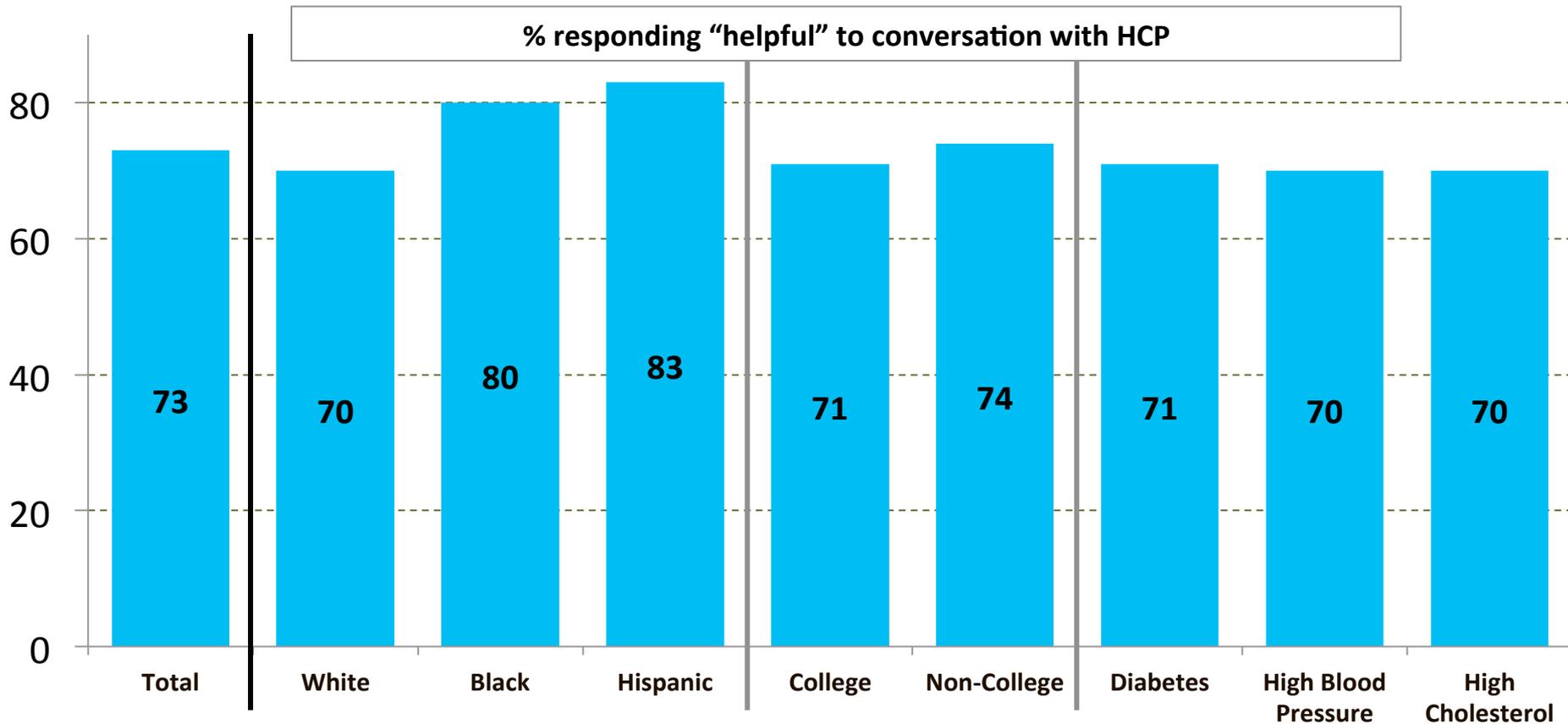
*Q.41-47: A lot of people need help reminding them when to take their medicine and how to take their medicine correctly. I am going to read you a list of tools some people use or things that can be done to help people take their medicine. Thinking specifically about yourself, please tell me whether each of these would be very helpful, somewhat helpful, not very helpful or not at all helpful.*

<b>% Responding “Helpful”</b>	<b>White (n=1242)</b>	<b>African American (n=315)</b>	<b>Hispanic (n=126)</b>
Have the pharmacy coordinate your refills so you can pick up all your medicines on the same day each month	75%	82%	78%
Write a list of questions to ask your doctor, nurse, or pharmacist about your medicines	67%	76%	72%
Obtain your medicines in packaging that helps you take your medicines in the right dosage at the right time	71%	83%	76%
Join a program that reduces or eliminates co-pays on prescriptions if you take your medicine as prescribed	68%	77%	73%
Have your doctor, nurse and/or pharmacist talk with you about your medicines and the risks of not taking them	70%	80%	83%
Use a 7-day pill box	65%	76%	70%
Use a chart to help keep track of each medicine, its purpose and dose	52%	60%	65%
Add an app or text message service to your cell phone that reminds you when to take your medicine.	50%	65%	62%

Base: all respondents in target markets (n=1800)

# A majority say having a health care professional (HCP) initiate a conversation on medications is “very helpful”

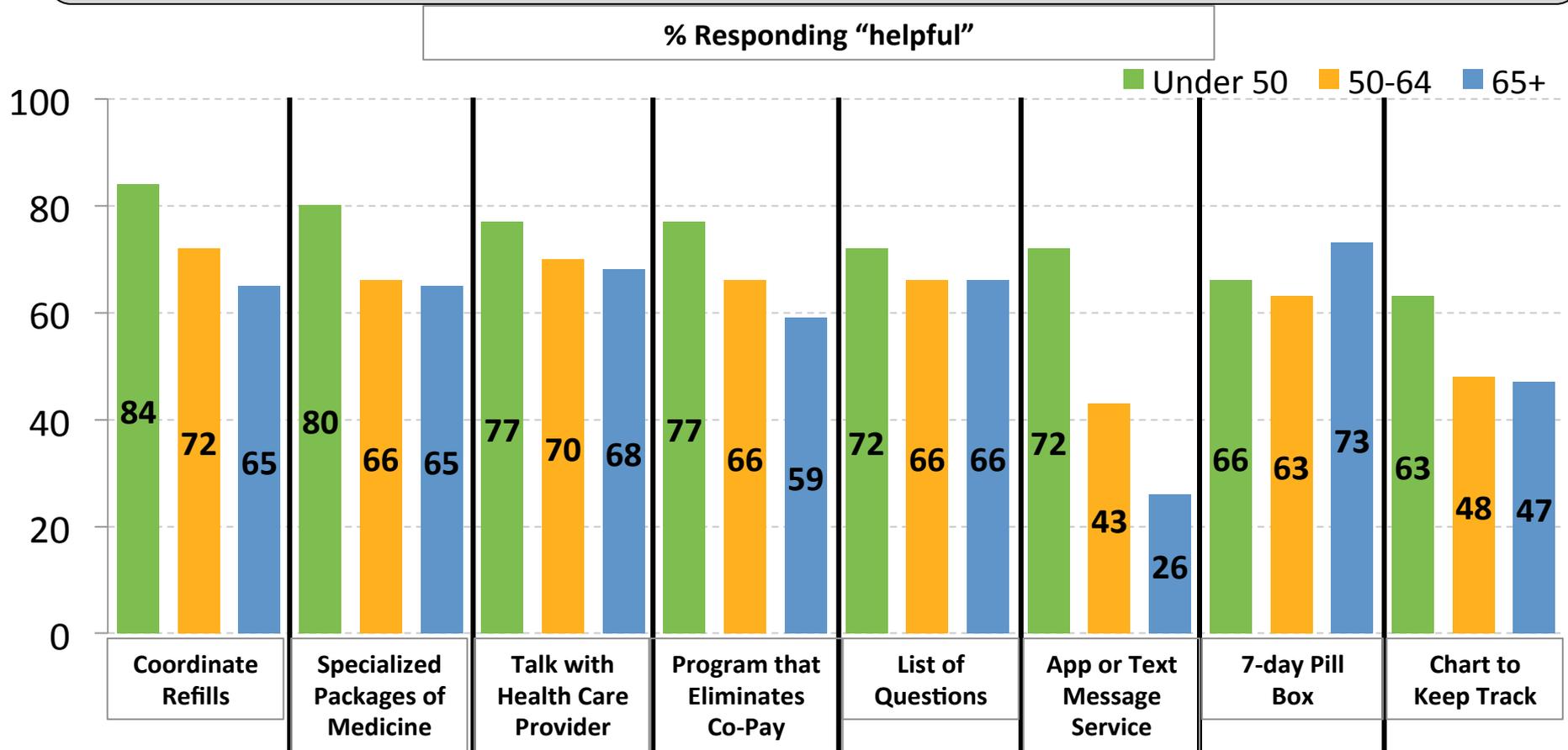
Q.45A: A lot of people need help reminding them when to take their medicine and how to take their medicine correctly. I am going to read you a list of tools some people use or things that can be done to help people take their medicine. Thinking specifically about yourself, please tell me whether each of these would be very helpful, somewhat helpful, not very helpful or not at all helpful. Have your doctor, nurse and/or pharmacist talk with you about your medicines and the risks of not taking them.



Base: all respondents in target markets (n=1800)

# Increased communication and convenience seen as helpful for both younger and older individuals who take medication

*Q.41: A lot of people need help reminding them when to take their medicine and how to take their medicine correctly. I am going to read you a list of tools some people use or things that can be done to help people take their medicine. Thinking specifically about yourself, please tell me whether each of these would be very helpful, somewhat helpful, not very helpful or not at all helpful.*



Base: all respondents in target markets (n=1800)

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