

CHPA

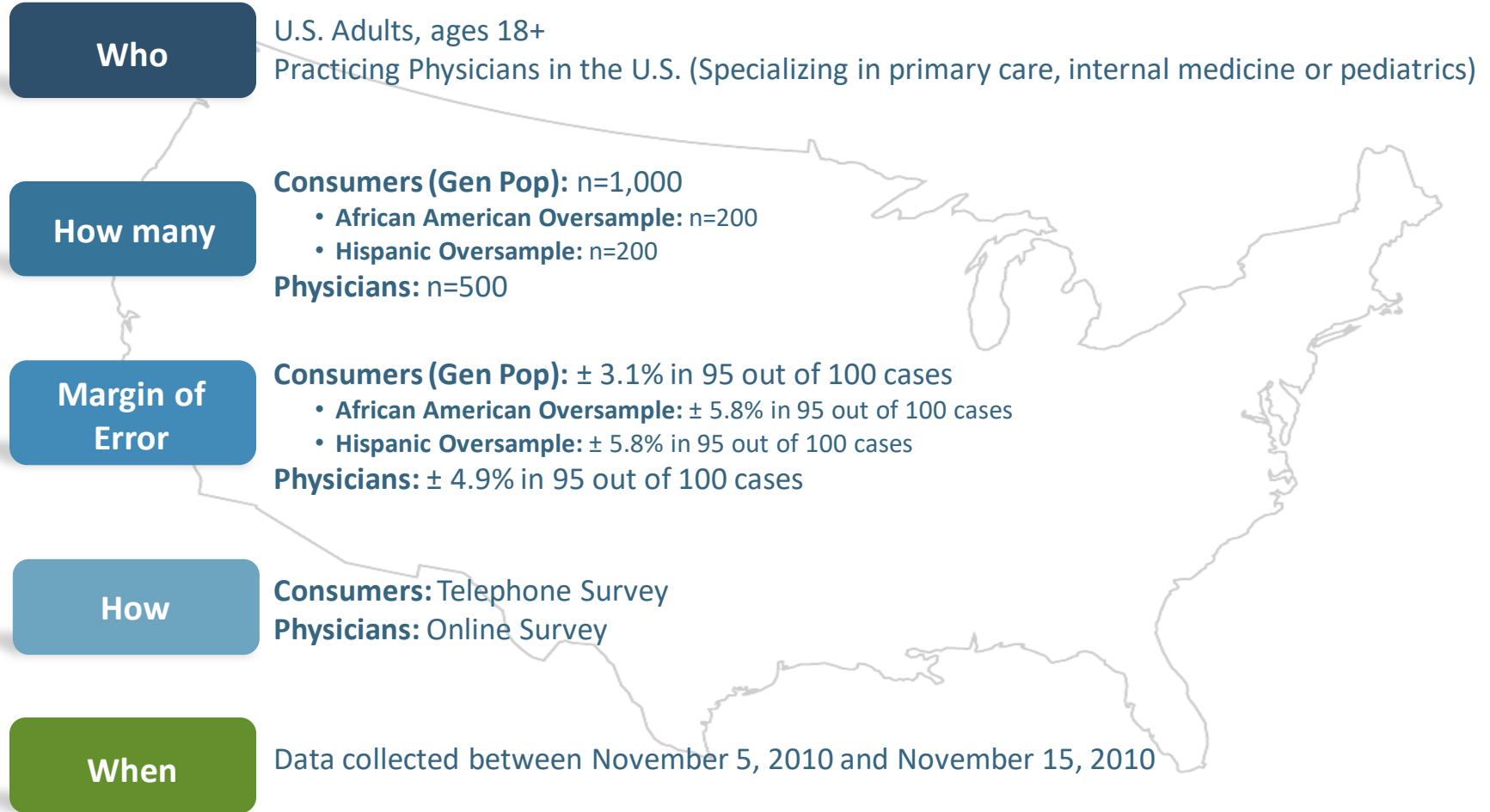
Your Health at Hand: Perceptions of over-the-counter medicine in the U.S.

November 24, 2010





Research Methodology



Key Findings



Key Findings - Physicians

OTC medicines are an important part of healthcare management

- **93%** of physicians agree that it is important that medicines for minor ailments be available over the counter.
- **87%** of physicians believe OTC medicines are an important part of overall health care.

OTC medicines help reduce the burden on medical professionals

- On average, physicians say about **10% of office visits result from minor ailments** which could be self-managed by patients, including by the use of OTC medicines. This amounts to over **40 million appointments** each year that could be avoided with self-care.
- **89%** of physicians agree that responsible use of over-the-counter medicines can help to ease the burden on medical professionals.
- **76%** of physicians agree that the availability of over-the-counter medicines help make managing patient health easier.

Physicians trust OTC medicines to help consumers safely and effectively care for their minor ailments

- **92%** of physicians believe OTC medicines are effective and **91%** believe these medicines are safe.
- **88%** of physicians agree that they recommend patients try to address minor ailments with self-care interventions, including the use of OTC medicines, before seeking professional care.
- **Physicians are more likely to** recommend over-the-counter medicines as a first response treatment option for adult's minor ailments than options like calling a physician or scheduling a doctor's appointment.



Key Findings - Consumers

80% of consumers have used an over-the-counter medicine in the last year

OTC medicines provide consumers with affordable, accessible and convenient health care options

- **86%** of U.S. adults believe responsible, over-the-counter medicine use helps lower health care costs for people like them.
- **68%** of U.S. parents have given their child an OTC medicine late at night to help treat a sudden medical symptom.
- **46%** of U.S. adults who believe OTC medicines are important believe so because they do not need a doctor's visit to use them.

Consumers trust over-the-counter medicines to provide relief for minor ailments

- **89%** believe over-the-counter medicines are an important part of their overall family health care.
- **81%** of U.S. adults use OTC medicines as a first response to minor ailments.
- U.S. adults believe over-the-counter medicines are **just as safe and effective** as prescription medicines when taken according to directions.

Over-the-counter medicines empower consumers to take charge of their own health

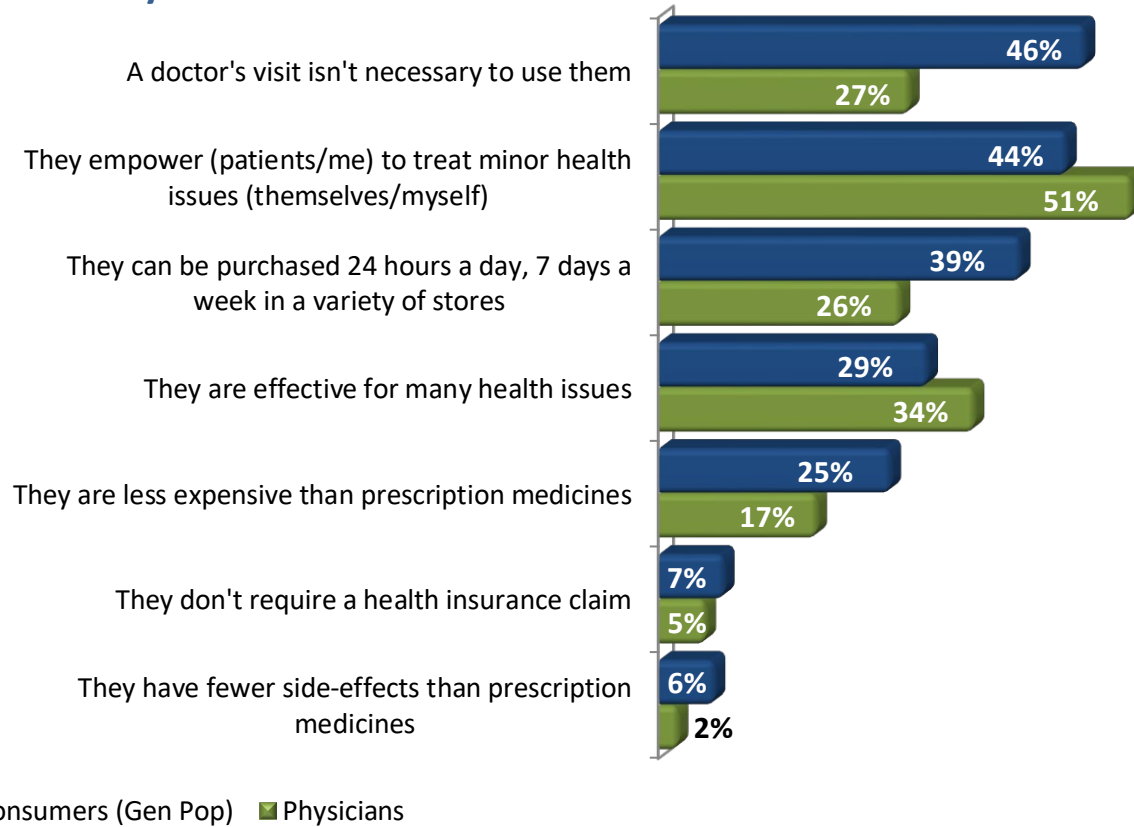
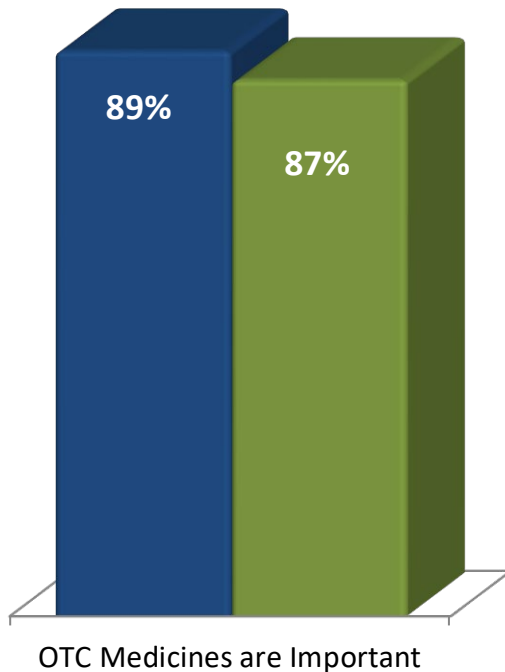
- **96%** of U.S. adults believe over-the-counter medicines make it easy for individuals to care for minor medical ailments.
- **93%** of U.S. adults prefer to treat their minor ailments with over-the-counter medicines before seeking professional care.
- **86%** of U.S. adults agree that medical visits for minor ailments are unnecessary because of the availability of over-the-counter medicine.
- **85%** of U.S. parents prefer to treat their children's minor ailments with an OTC medicine before seeking professional care.

Overview of OTC Perceptions



Importance of OTC Medicines

Consumers and physicians agree that over-the-counter medicines are an important part of overall health care. These medicines are important because they empower consumers to effectively treat their own minor ailments, don't require a doctor's visit and are accessible 24 hours a day, seven days a week.

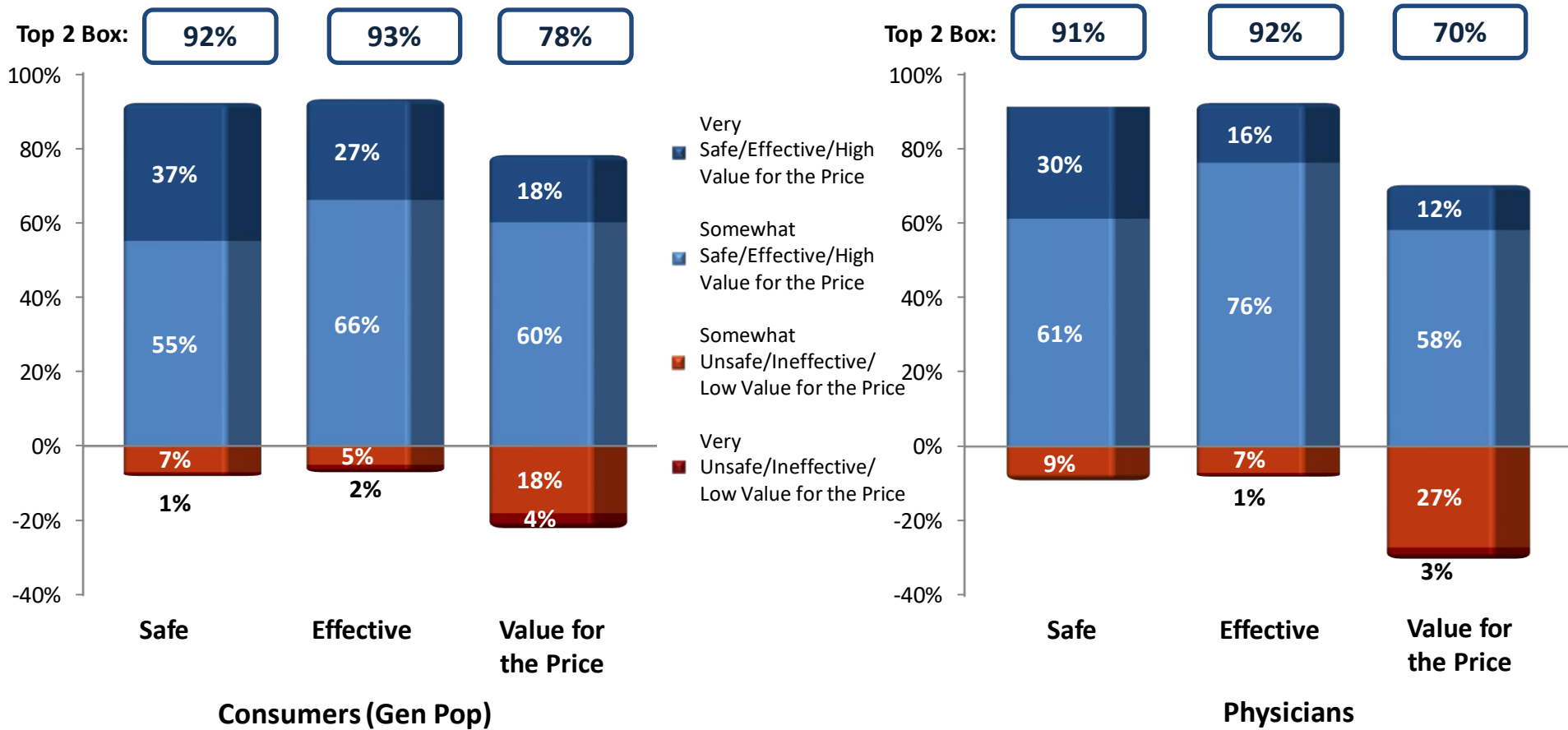


- How important would you say the following are as a part of overall health care? (Shown: Over-the-counter medicines)
- Which of the following are the **primary** reasons why over-the-counter medicines are an important part of overall health care? (Shown: Total mentions, Asked only of those who say OTCs are important)



Evaluating Over-the-Counter Medicines

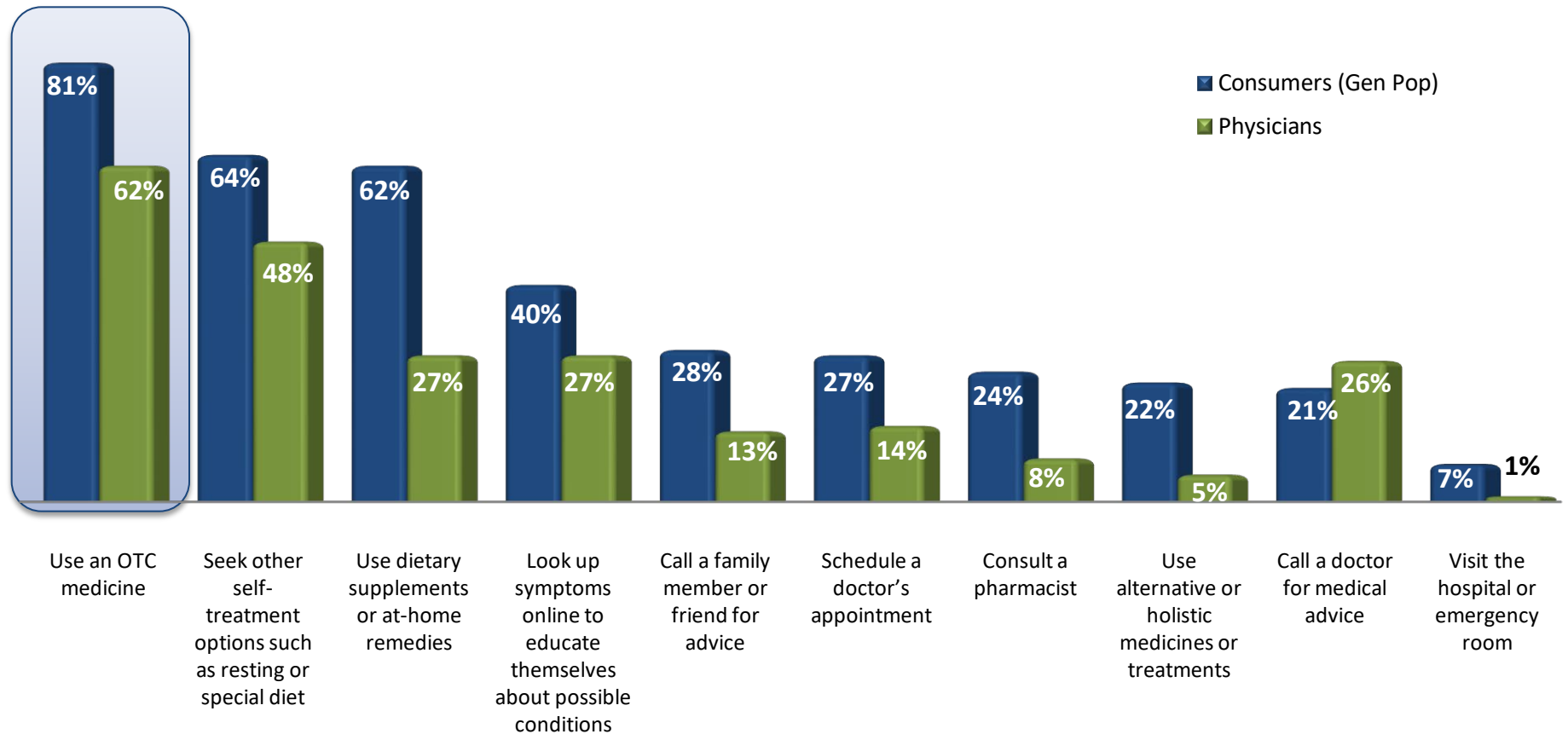
Both audiences also agree that OTCs are safe, effective medicines. Consumers are more likely to see over-the-counter medicines as offering high value for the price.





First Responses to Adult Minor Ailments

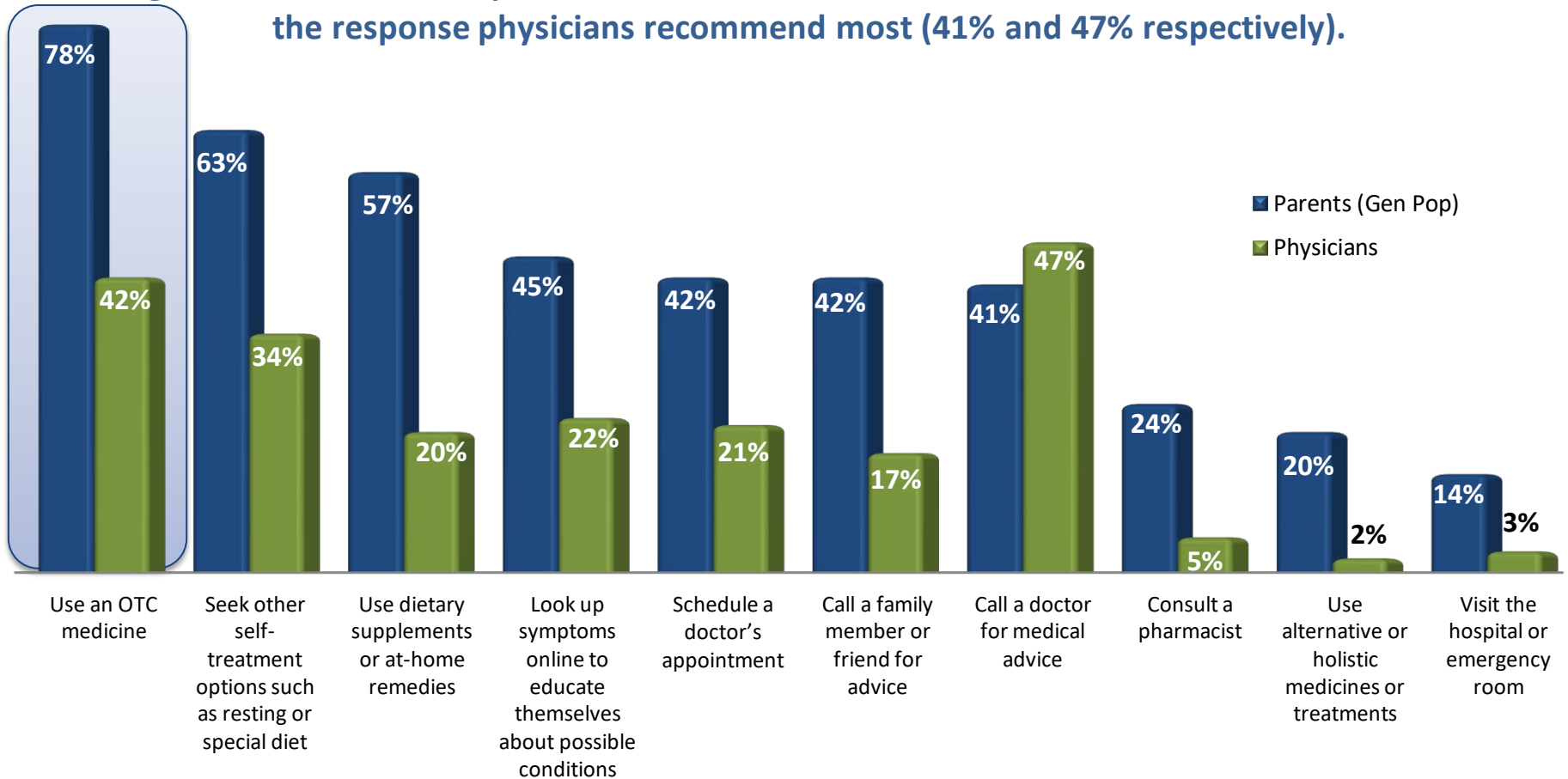
81% of consumers use over-the-counter medicines as a first response to symptoms of minor ailments for adults. OTC use is also the first response treatment recommended most by physicians.





First Responses to Children's Minor Ailments

Over-the-counter medicine use is also the most common first response option for parents when their children display symptoms of minor ailments. However, parents are far more likely to suggest calling a doctor as a first response treatment for their children's ailments than their own, which is the response physicians recommend most (41% and 47% respectively).

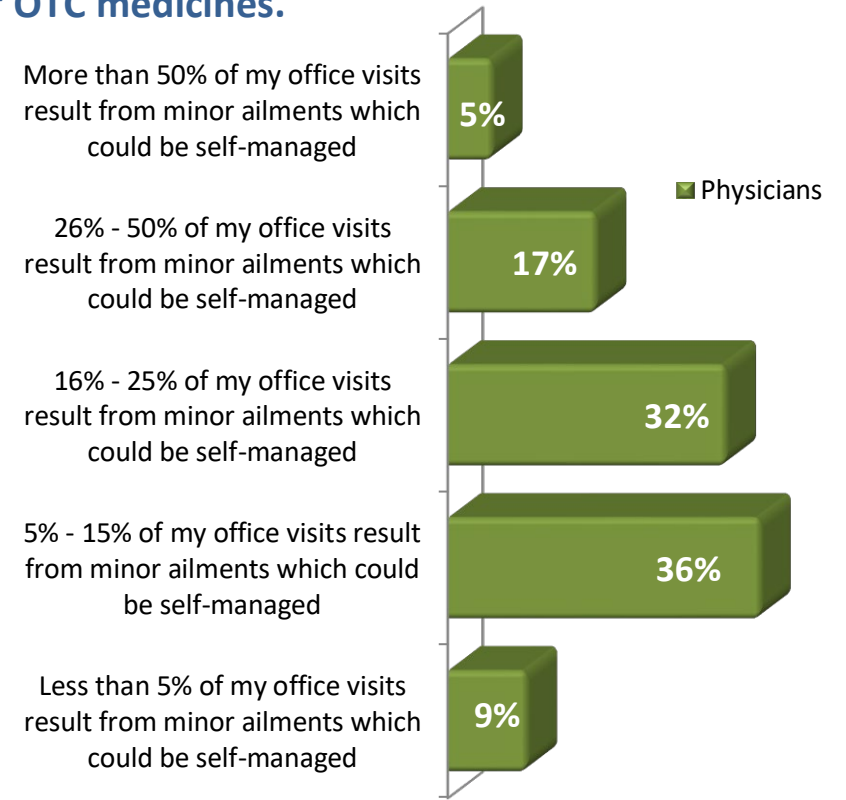
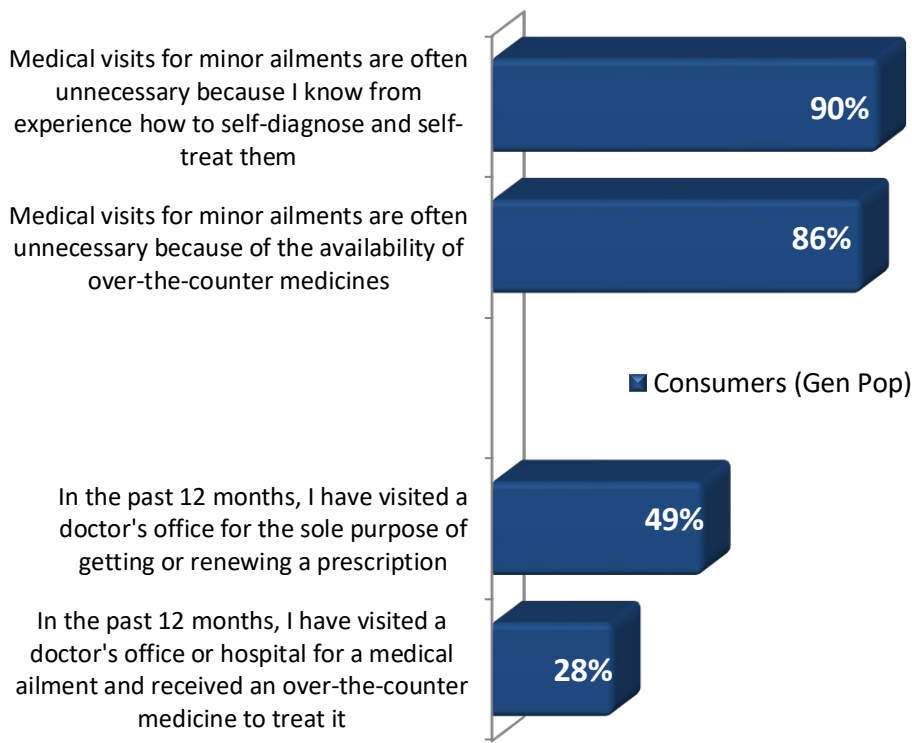


- When (a child/one of your children) experiences minor ailments such as headache, fever, cold or upset stomach, which of the following (do you think are the first things parent or caregivers should do/are the first things that you do)?



Unnecessary Medical Visits

On average, physicians believe about 10% of visits to their office result from minor ailments which could be self-managed. More than one-quarter (28%) of consumers say they visited a doctor's office for a medical ailment only to receive an over-the-counter medicine to treat it. Additionally, consumers agree that many office visits are actually unnecessary crediting both personal experience and the availability of OTC medicines.

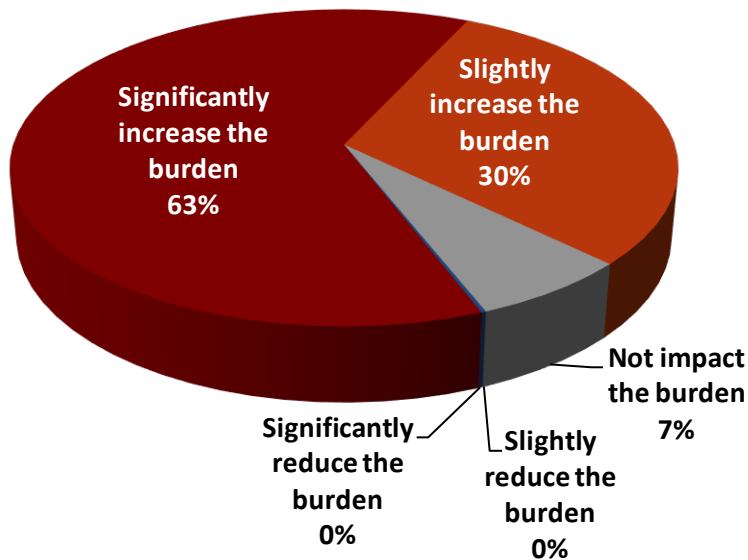


- Physicians: How many visits to your office do you estimate result from minor ailments which could be self-managed by the patient, including by the use of over-the-counter medicines?
- Consumers: How much do you agree with the following statements? (Shown: Top 2 Box, "Strongly agree" or "Somewhat agree")
- Consumers: Please indicate whether or not each of these are things that have happened in the past 12 months.

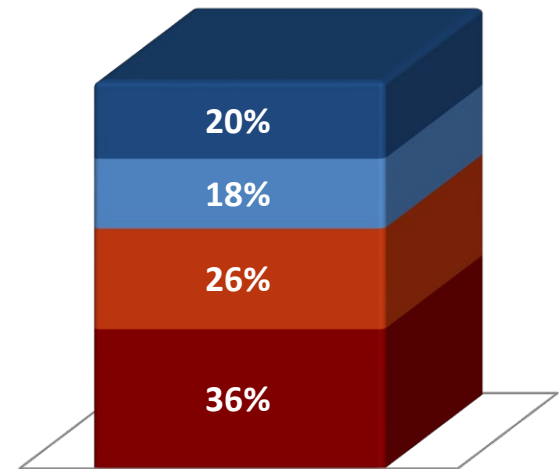


Increasing the Burden on Physicians

Most physicians believe the new FSA regulations, which require consumers to obtain a prescription for over-the-counter medicines in order to be reimbursed for these expenses, will increase the burden on medical professionals. However, slightly more than one-third of consumers with an FSA say they are likely to seek a prescription for these medicines.



Physicians: What impact do you believe this new ruling will have on medical professionals such as yourself?



Consumers: How likely are you to seek out a doctor's prescription in order to be reimbursed for your over-the-counter medicine purchases?

- Not at all likely
- Not very likely
- Somewhat likely
- Very likely

Physicians Detailed Findings

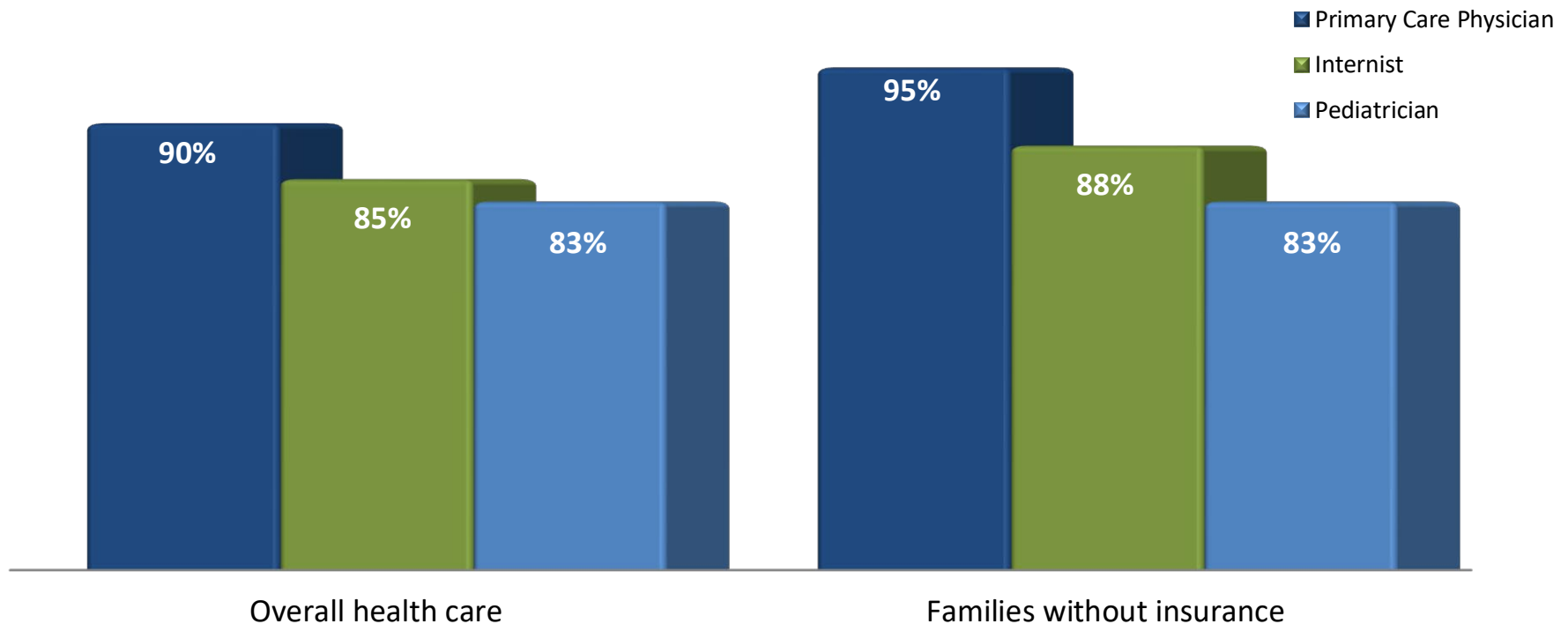
Physicians:

Perceptions of OTC Medicines



Importance of OTC Medicines Across Professional Roles

87% of physicians agree that over-the-counter medicines are important for overall health care. Those who self-identify as primary care physicians are more likely than internists or pediatricians to feel this way – particularly when thinking about uninsured families.

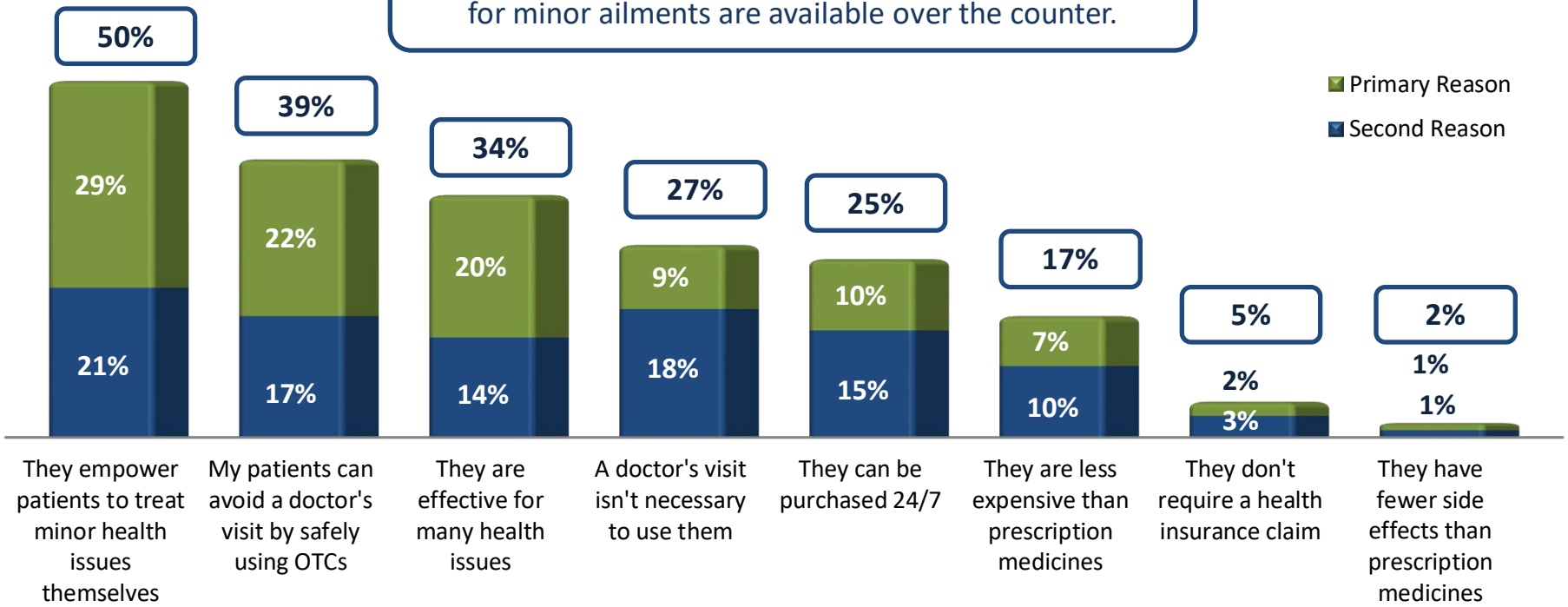




Importance of OTC Medicines

Physicians recognize a number of different reasons that make over-the-counter medicines an important part of health care including patient empowerment, reduced physician burden, OTC effectiveness and accessibility.

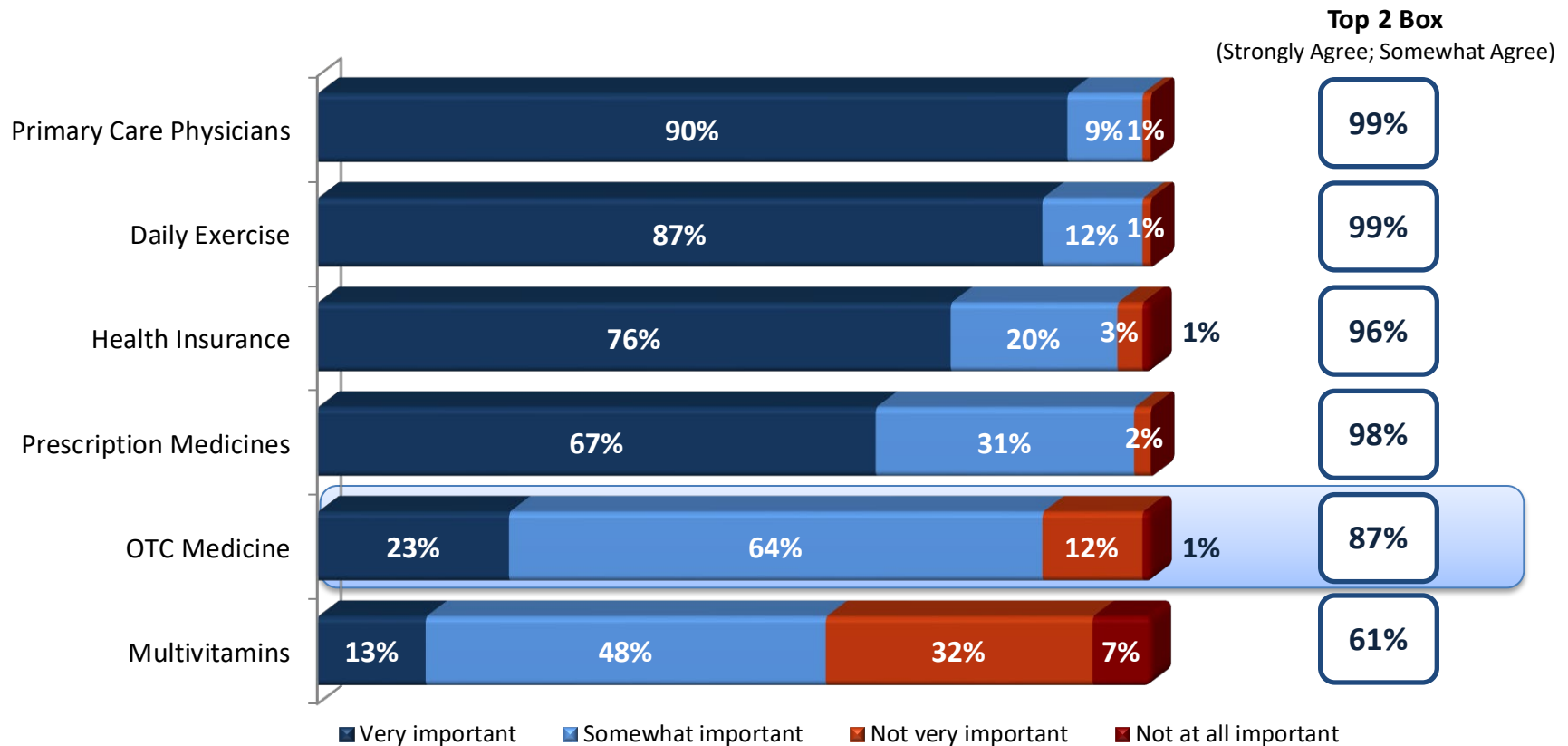
93% of Physicians agree it is important that medicines for minor ailments are available over the counter.





Importance of Other Health Care Options

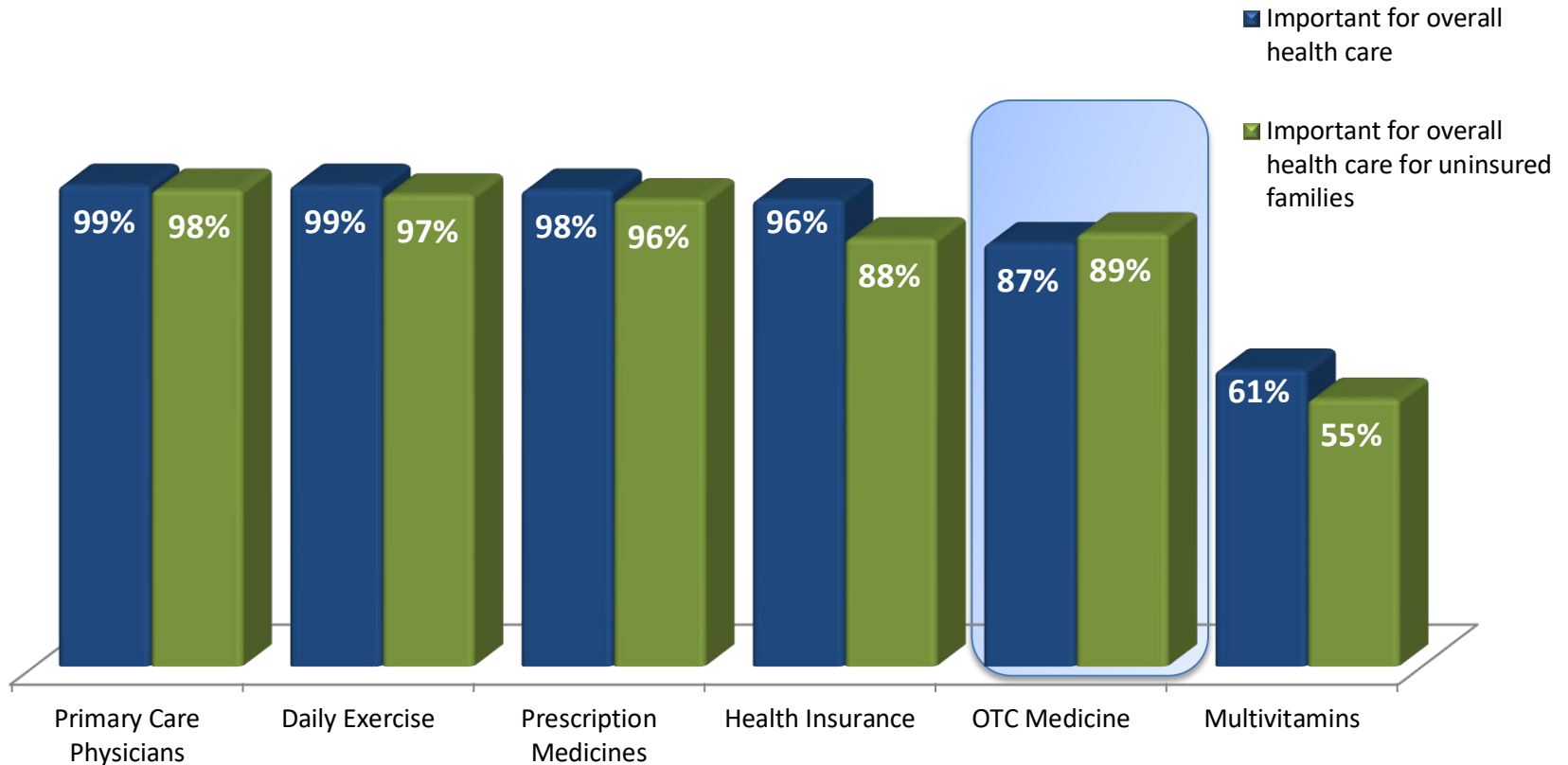
Although a majority of physicians see OTCs as important, they are more likely to see the importance in their own roles, preventative measures (like daily exercise), health insurance and prescription medicines as health care options. Still, the high levels of importance attributed to each indicate that all these elements, together, are important to overall health care.





Importance of Health Care Options for Uninsured Families

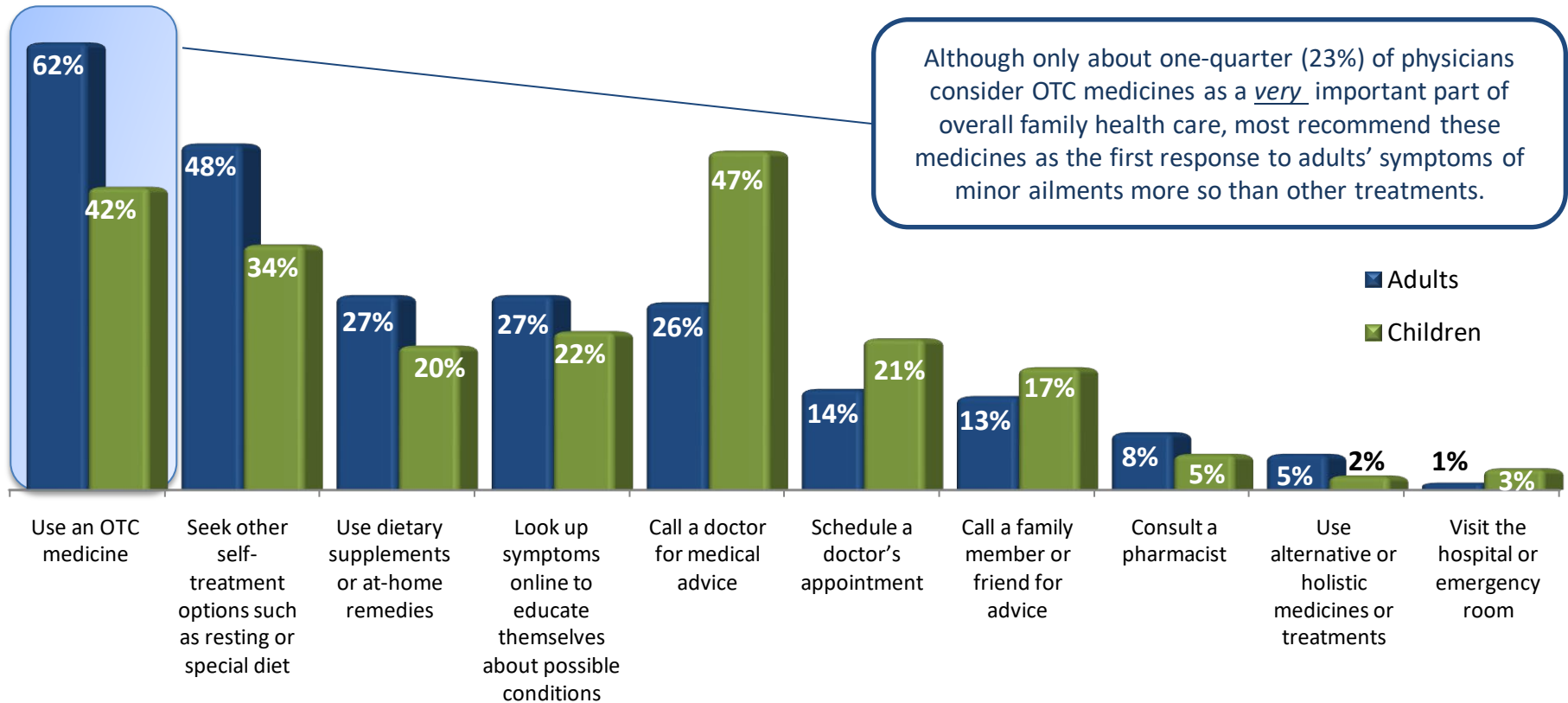
OTC medicines are just as important for uninsured families as they are for overall patient health care in the eyes of these physicians. They still believe primary care and prescription are more important, even though these families are paying out of pocket.





Recommended First Responses to Minor Ailments

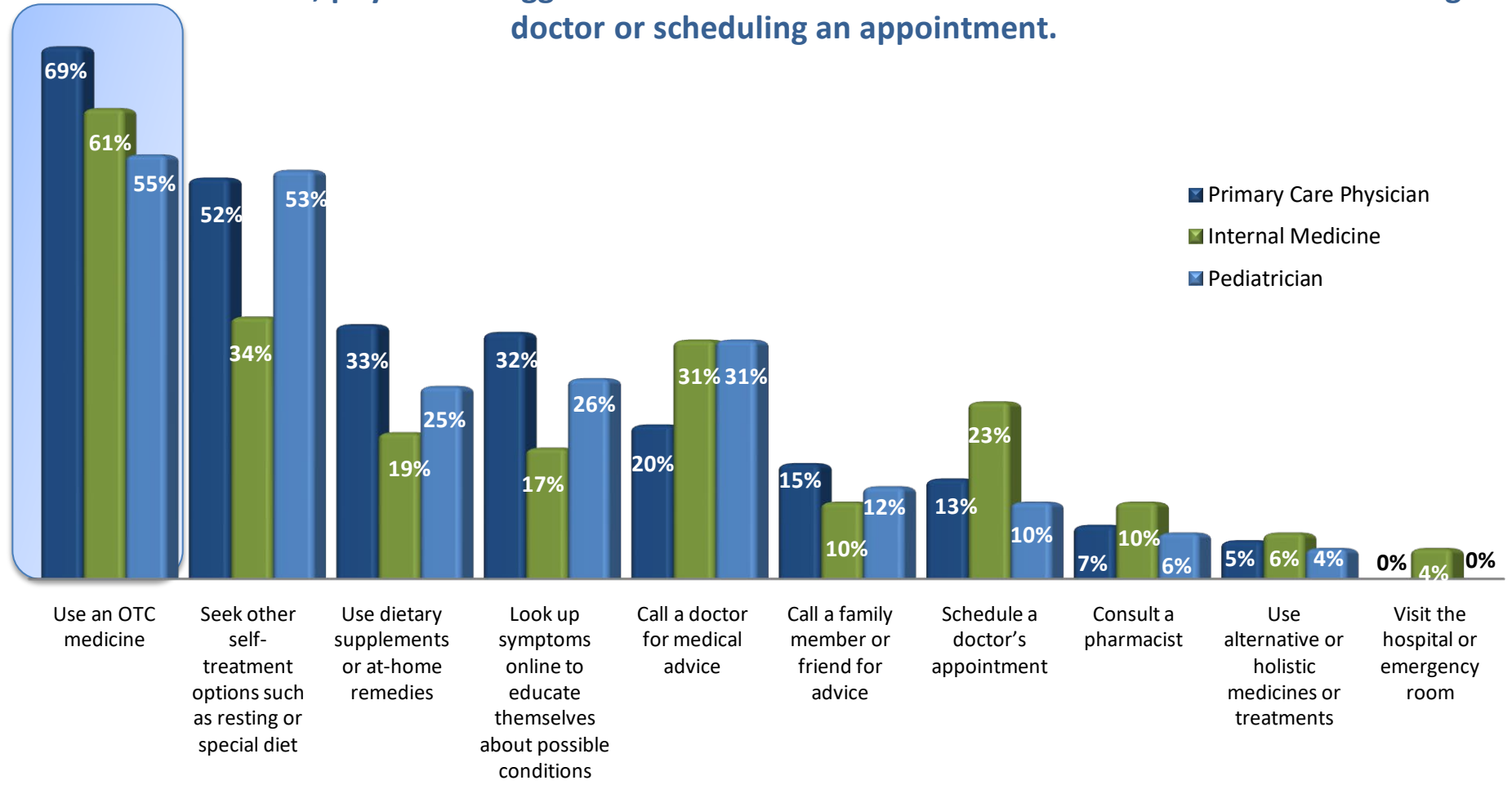
Physicians seen OTC medicines as a first response option for the treatment for symptoms of minor ailments in both children and adults. In fact, OTC medicine use is the primary first response recommendation for adult symptoms. Physicians are more likely to suggest consulting with a doctor first for children's symptoms.





Recommended First Responses to Adult Minor Ailments

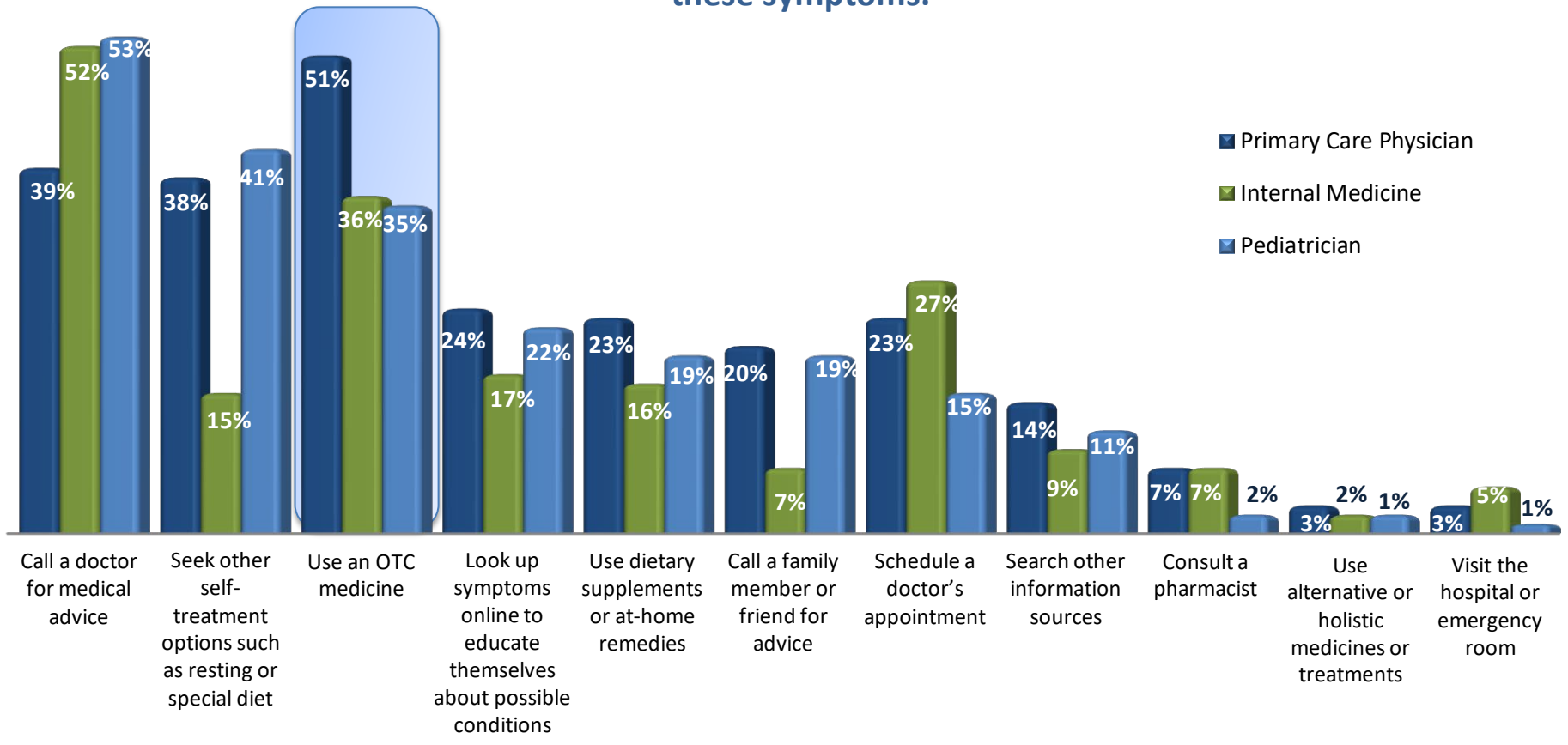
For adults, OTC medicines are the primary first response recommendation when it comes to minor ailments. In fact, physicians suggest a number of self-treatment measures to take before calling a doctor or scheduling an appointment.





Recommended First Responses to Child Minor Ailments

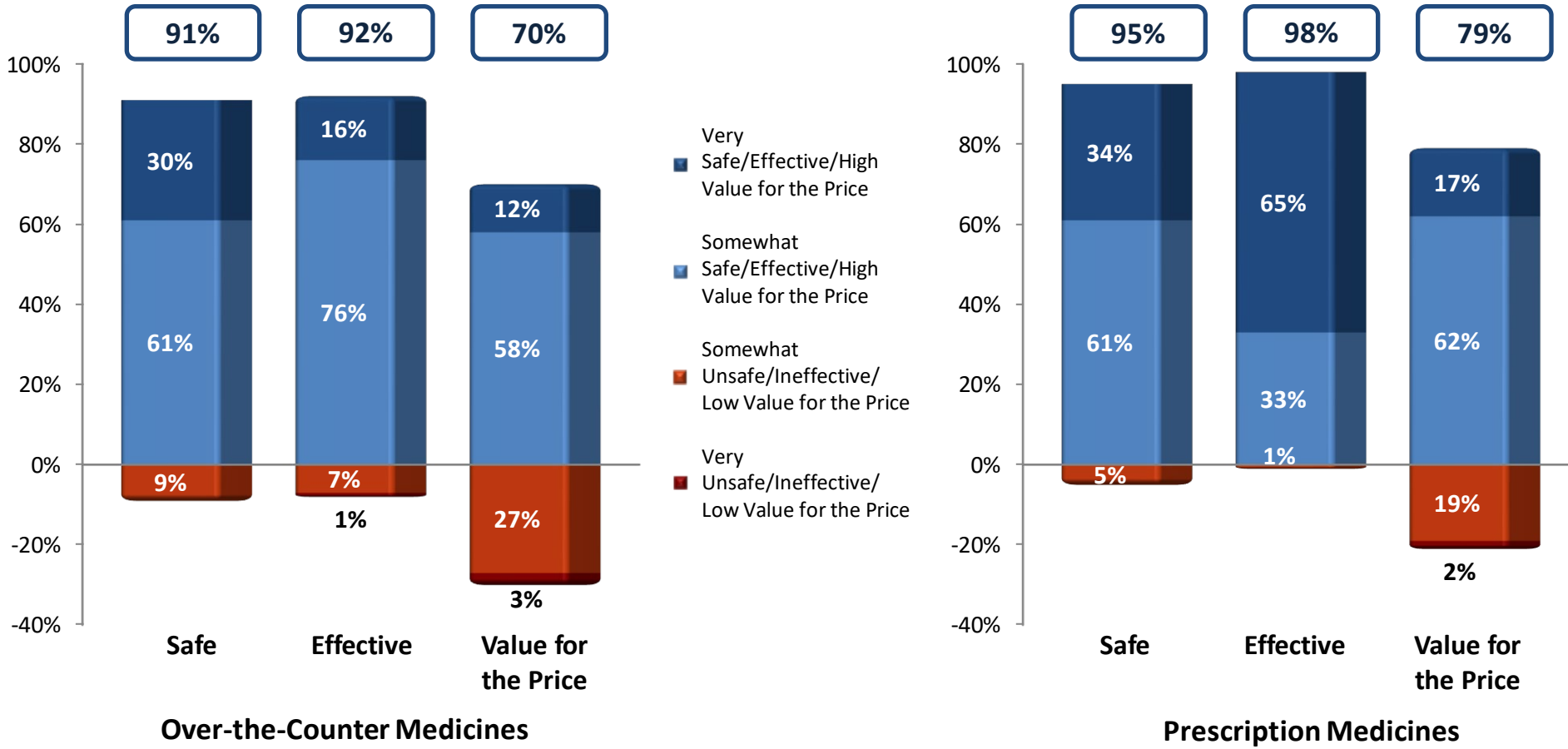
For children’s minor ailments, physicians (particularly internists and pediatricians) recommend that parents and caregivers call a doctor as their first response to symptoms. Although they prefer parents consult with physicians first, they still recognize OTCs as one of the first response options for these symptoms.





Prescriptions vs. OTCs

In general, physicians view both prescription medicines and their OTC counterparts as safe and effective and both categories of medicines are seen as offering high value for the price. However, these positive perceptions are higher for prescription medicine.



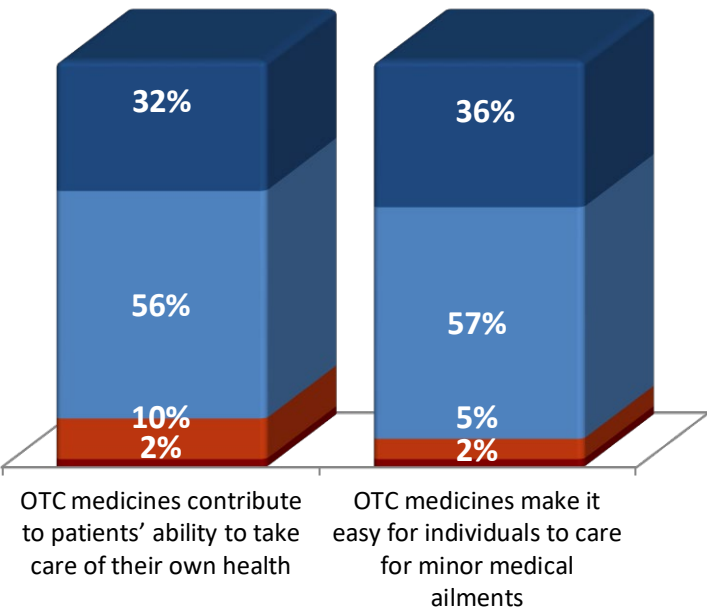


Benefits of OTC Medicines

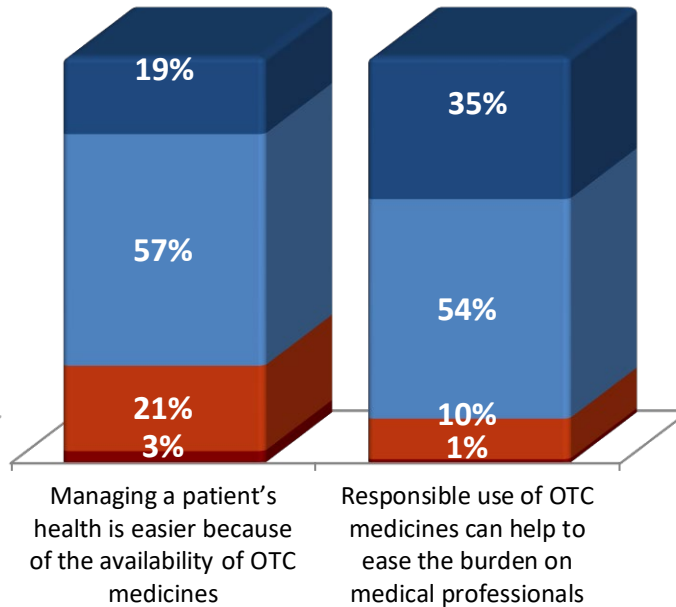
Physicians recognize that the availability of OTC medicines benefits the patients, themselves as physicians and the health care system overall.

88% of Physicians recommend that patients try to address minor ailments with self-care interventions, including the use of OTC medicines, before seeking professional care.

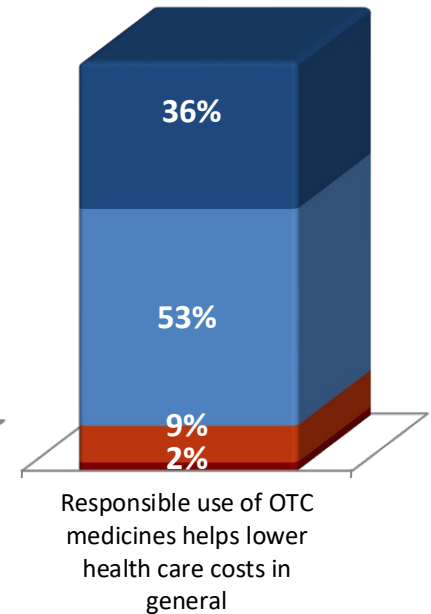
Patient Benefits



Physician Benefits



System Benefits



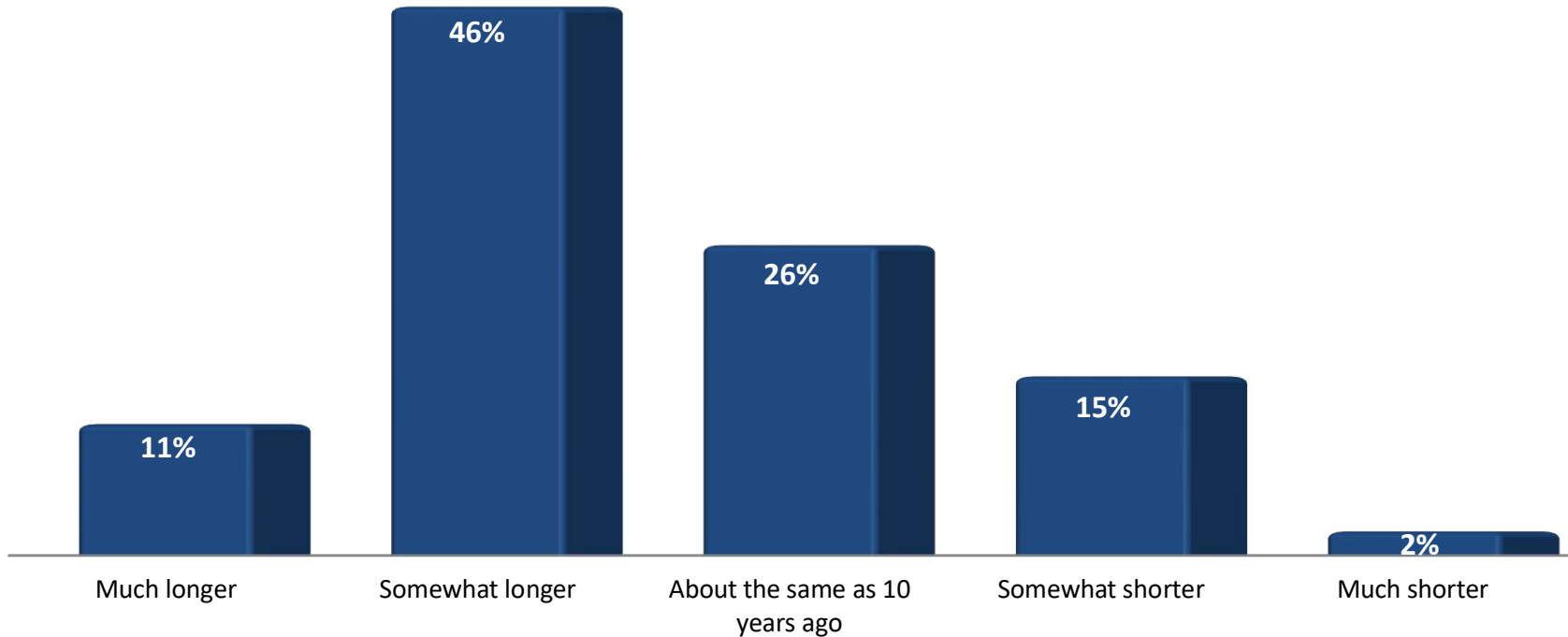
■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree

Physicians: *Office Wait Times*



Office Visit Wait Times

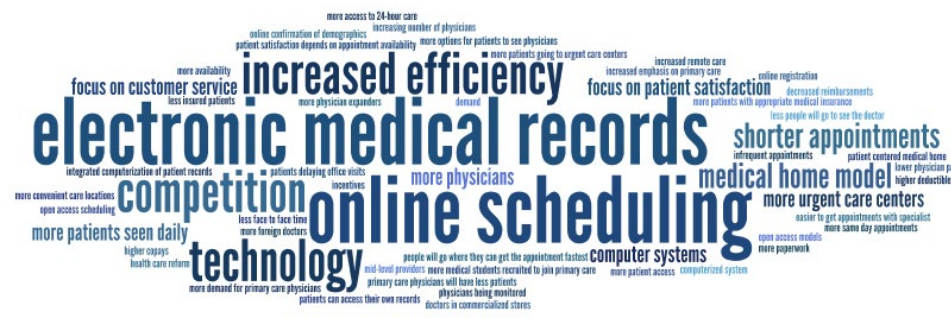
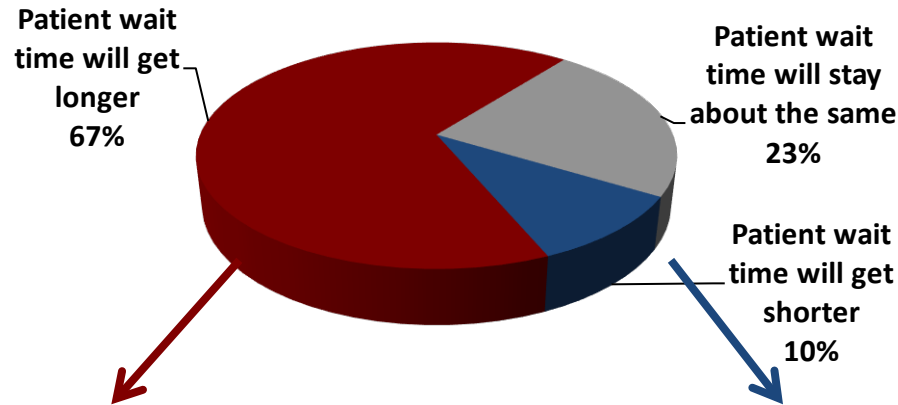
More than half (57%) of physicians (including 50% of those practicing for over 10 years) believe office wait times are longer now than they were 10 years ago. Another one-quarter believe wait times have remained unchanged.





Reasons for Changing Wait Times

In the near future, physicians predict that the growing PCP shortage and the resulting disparity between the number of patients and the number of available physicians will cause office wait times to get even longer. Few (10%) believe wait times will get shorter. These physicians believe technology like electronic medical records and online scheduling will increase efficiency.

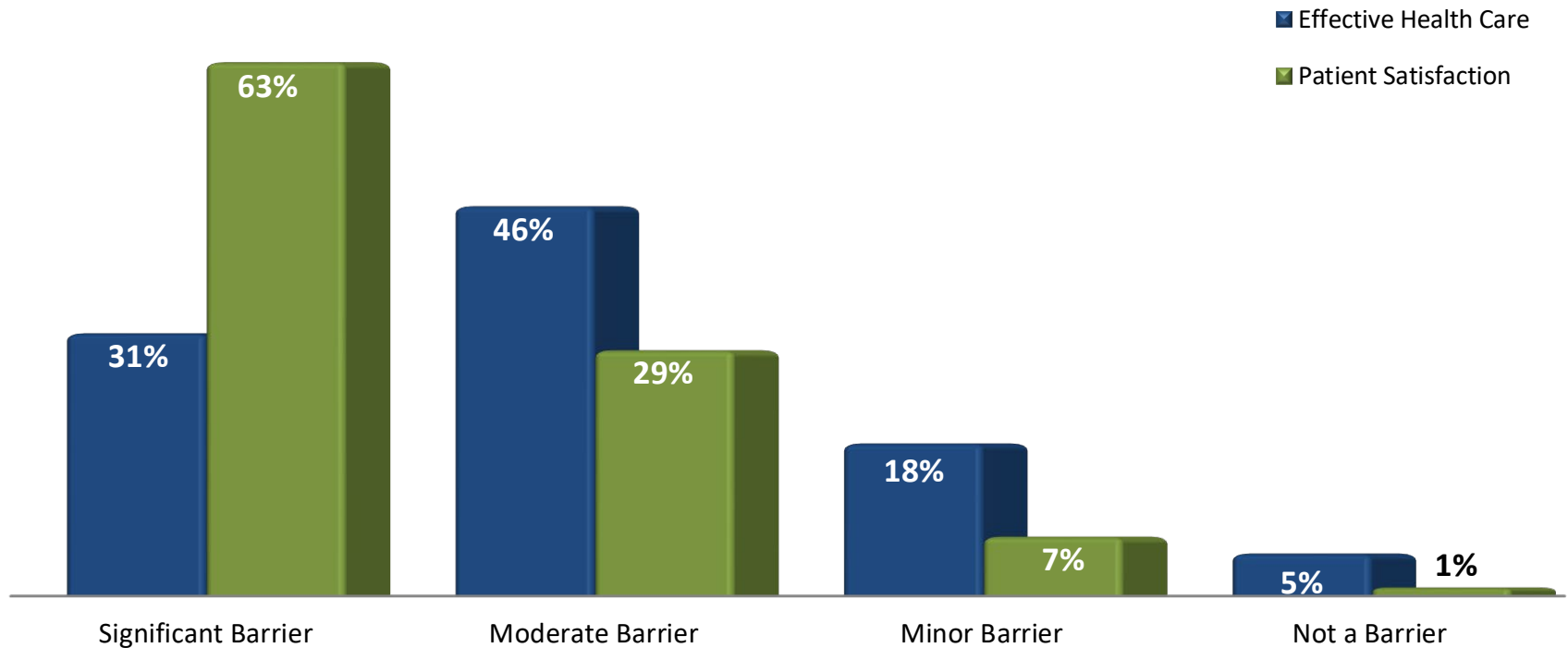


- Do you think that over the next 10 years the amount of time to schedule and wait for an appointment to see a doctor will get longer, shorter, or stay about the same as it is now?
- Word Clouds: For what reasons do you believe that wait times for appointments will get longer/shorter over the next 10 years?



Lengthening of Patient Wait Times

Physicians see the lengthening of wait times more significantly affecting patient satisfaction than the effective practice of health care. Still, 95% see these longer wait times as a barrier to effective health care.

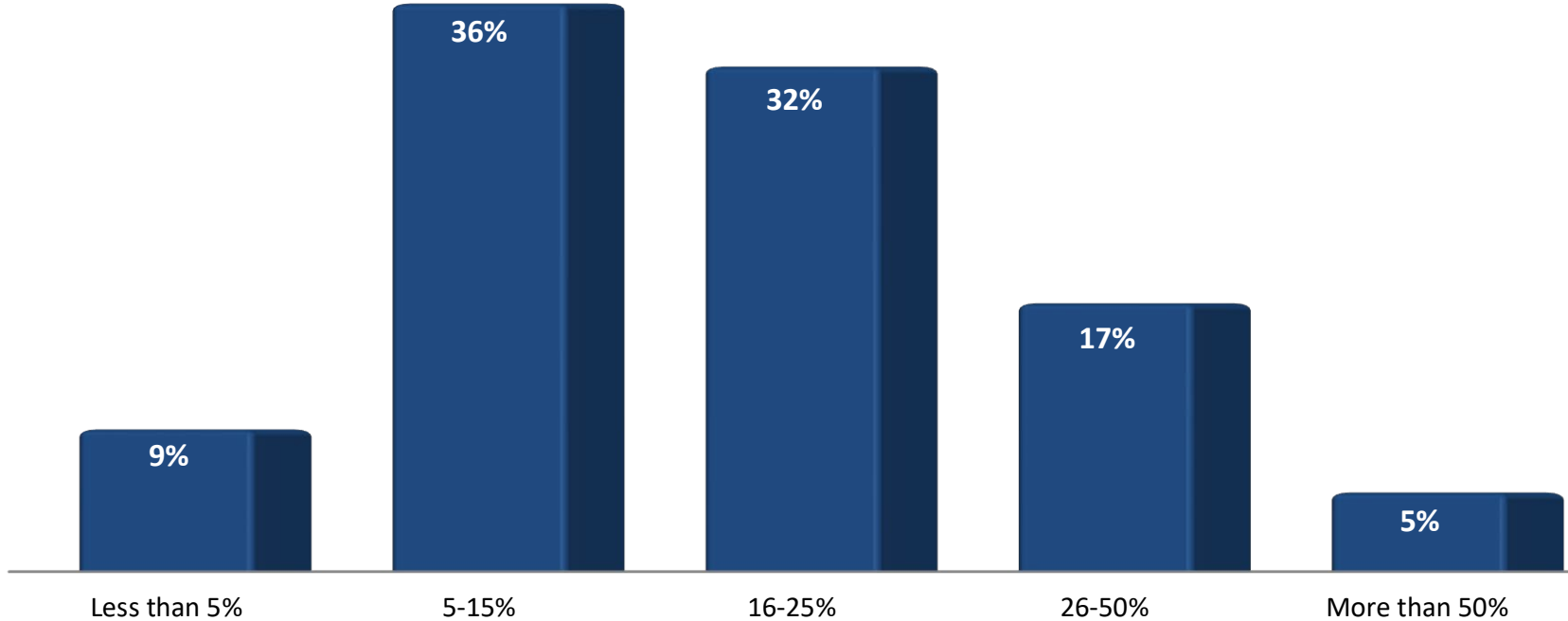


- Do you believe that the lengthening of patient wait time is a barrier to effective health care?
- Do you believe that the lengthening of patient wait time is a barrier to patient satisfaction?



Office Visits that Could be Avoided by OTC Medicines

On average, physicians say about 10% of office visits result from minor ailments which could be self-managed by patients, including by the use the of OTC medicines. This amounts to over 40 million appointments* each year that could be avoided with self-care.



- How many visits to your office do you estimate result from minor ailments which could be self-managed by the patient, including the use of over-the-counter medicines?
- *Numbers are based on CDC figures for number of primary care physician office visits in the US. <http://www.cdc.gov/nchs/fastats/docvisit.htm>

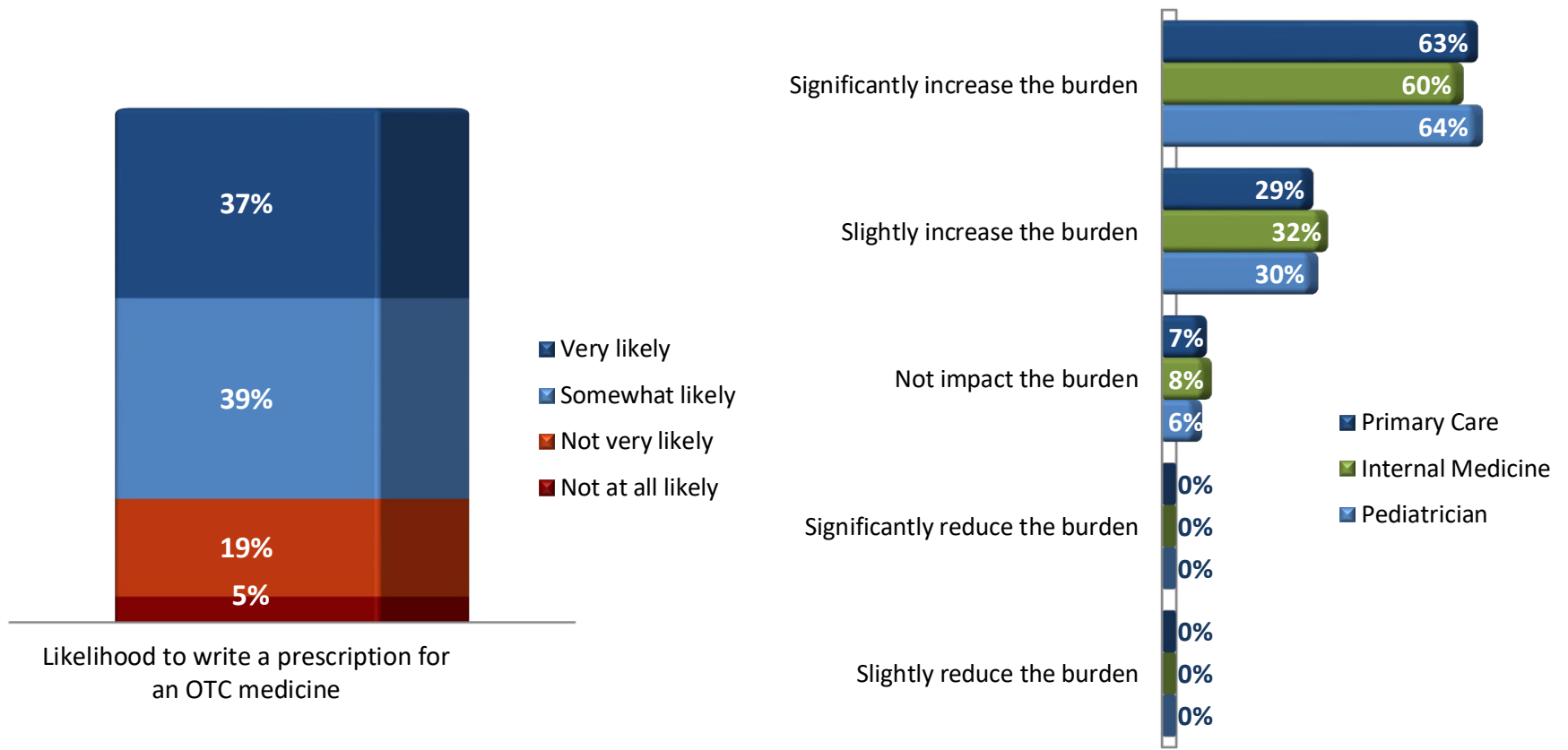
Physicians:

New FSA Legislation



New FSA Legislation Effects

Most physicians believe the new FSA regulations, which require consumers to obtain a prescription for over-the-counter medicines in order to be reimbursed for these expenses, will increase the burden on medical professionals.



- How likely are you to write a prescription in order for your patients to be reimbursed for their over-the-counter medicine purchases?
- What impact do you believe this new ruling will have on medical professionals such as yourself?



Demographics

		Total %
Gender	Male	64%
	Female	36%
Professional Role	Primary Care Physician	43%
	Internal Medicine	21%
	Pediatrician	36%
Years Practicing	1-5	15%
	6-10	22%
	11-15	21%
	16-24	23%
	25+	20%

		Total %
Age	18-24	0%
	25-34	15%
	35-44	32%
	45-54	30%
	55-64	21%
	65+	3%
Region	Northeast	30%
	Central	22%
	South	30%
	West	18%

Consumer Detailed Findings

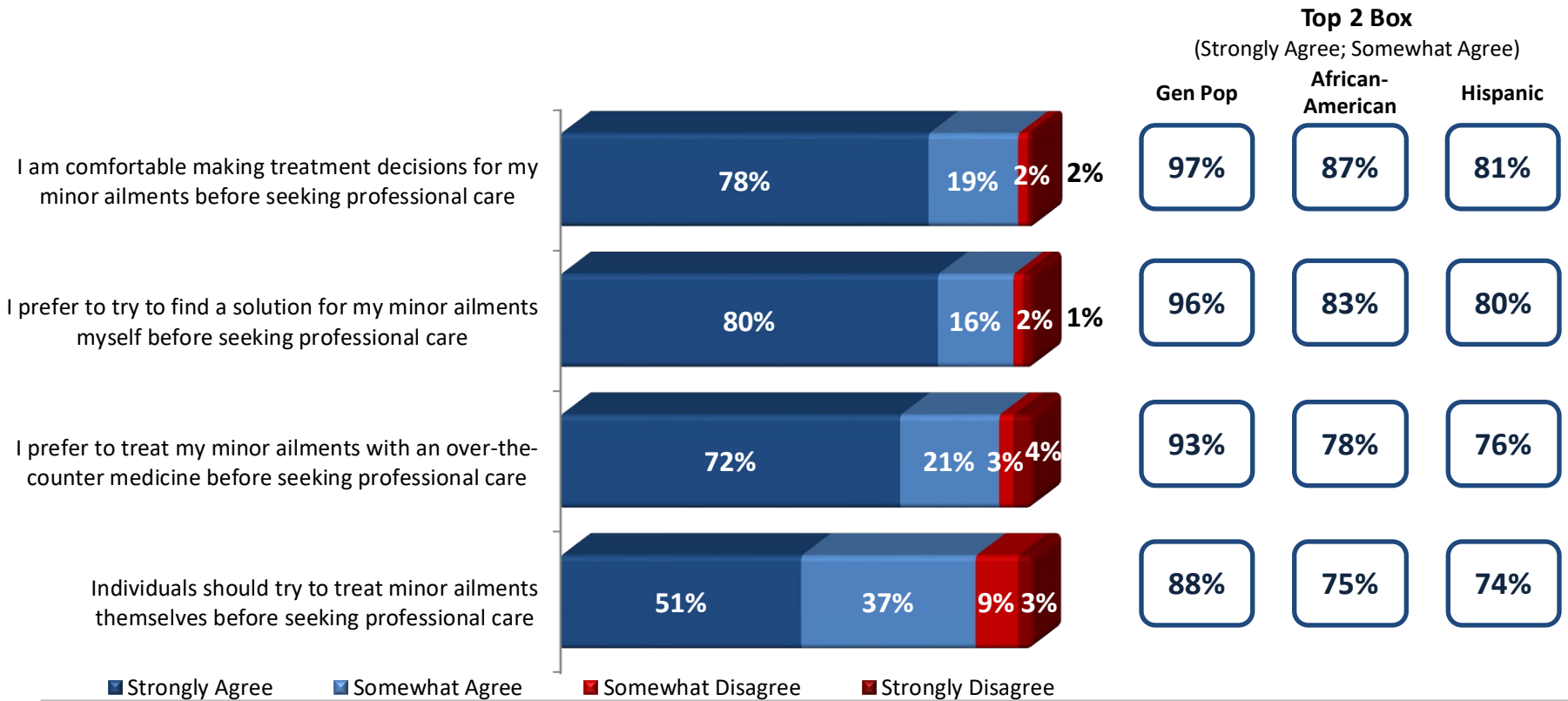
Consumers:

Self-Treatment of Minor Ailments



Self-Treating Minor Ailments

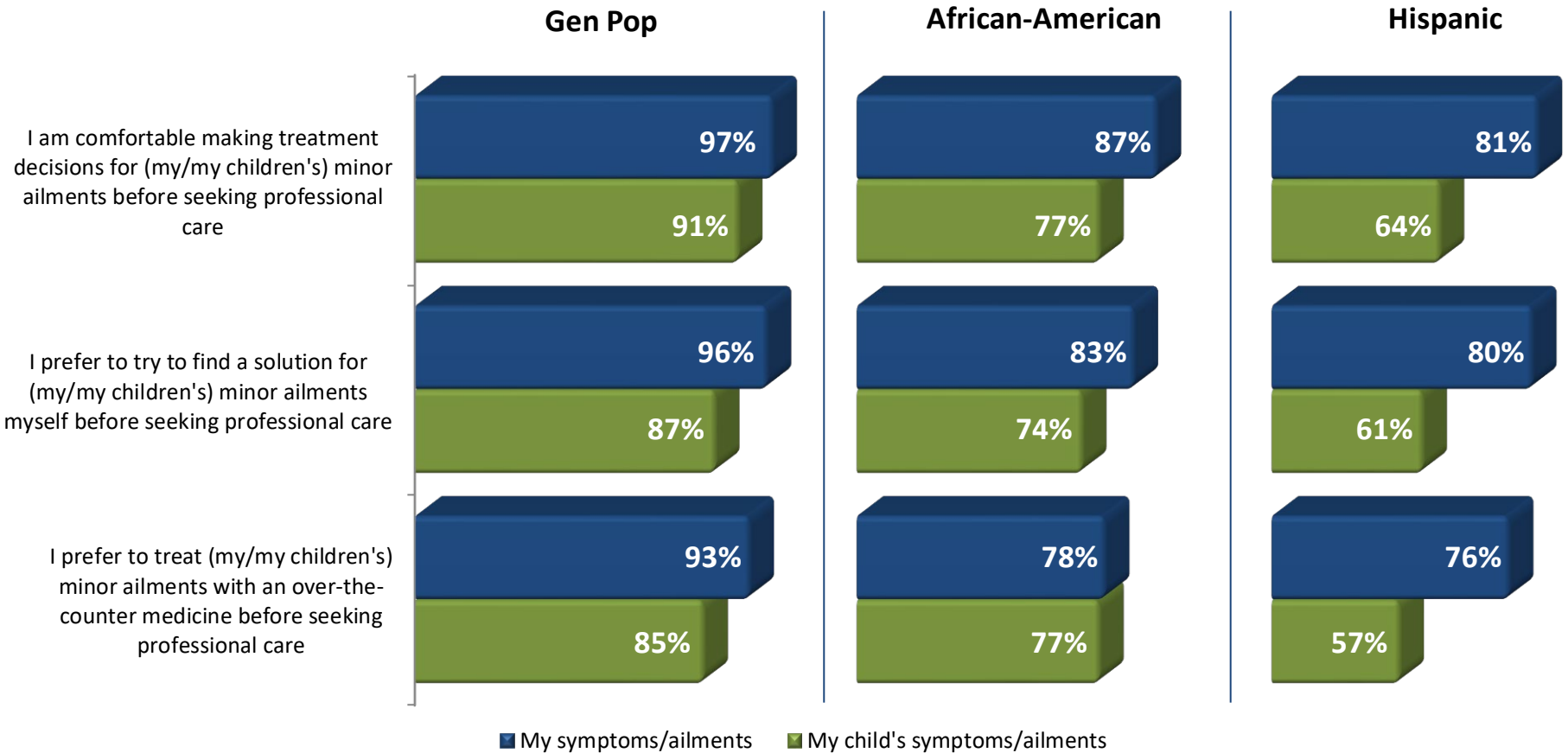
Most US adults are comfortable treating their own minor ailments before seeking professional care. They prefer to find their own solutions for their symptoms first and 93% prefer to treat themselves with an over-the-counter before going to a doctor. Comfort with using OTCs before seeking professional care is lower among African-Americans and Hispanics, but still over three-quarters of each group treat their ailments with OTCs before visiting a doctor.





Self-treating Children's Minor Ailments

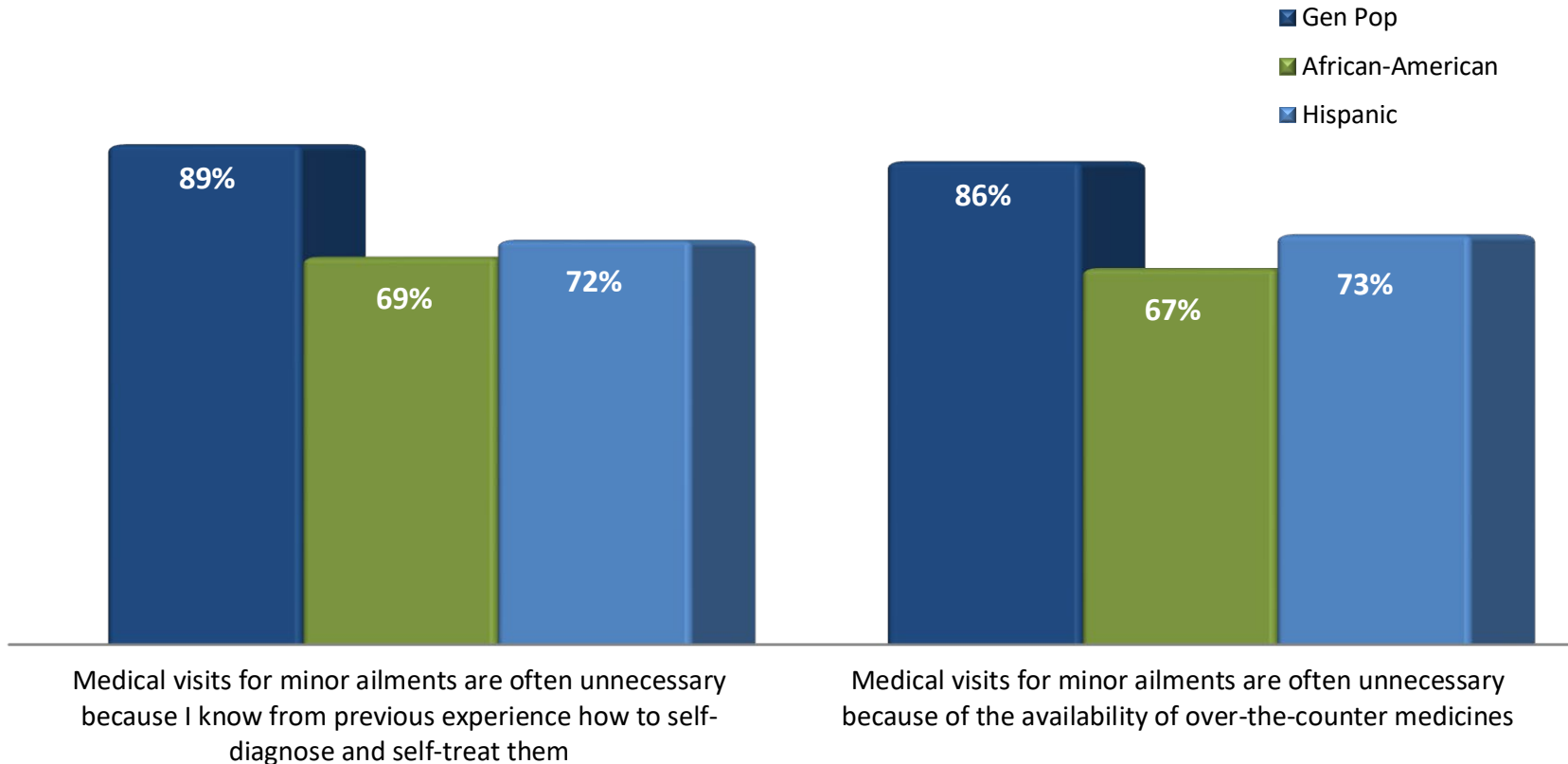
Parents in the US are also comfortable seeking their own treatments (including over-the-counter medicines) for their children's minor ailments. However, Hispanic parents are far less likely than other groups to treat their child's symptoms with OTCs before seeking professional care.





Unnecessary Physician Office Visits

Furthermore, most US adults believe the availability over-the-counter medicines and their own personal experiences with treating minor ailments make many medical visits unnecessary.



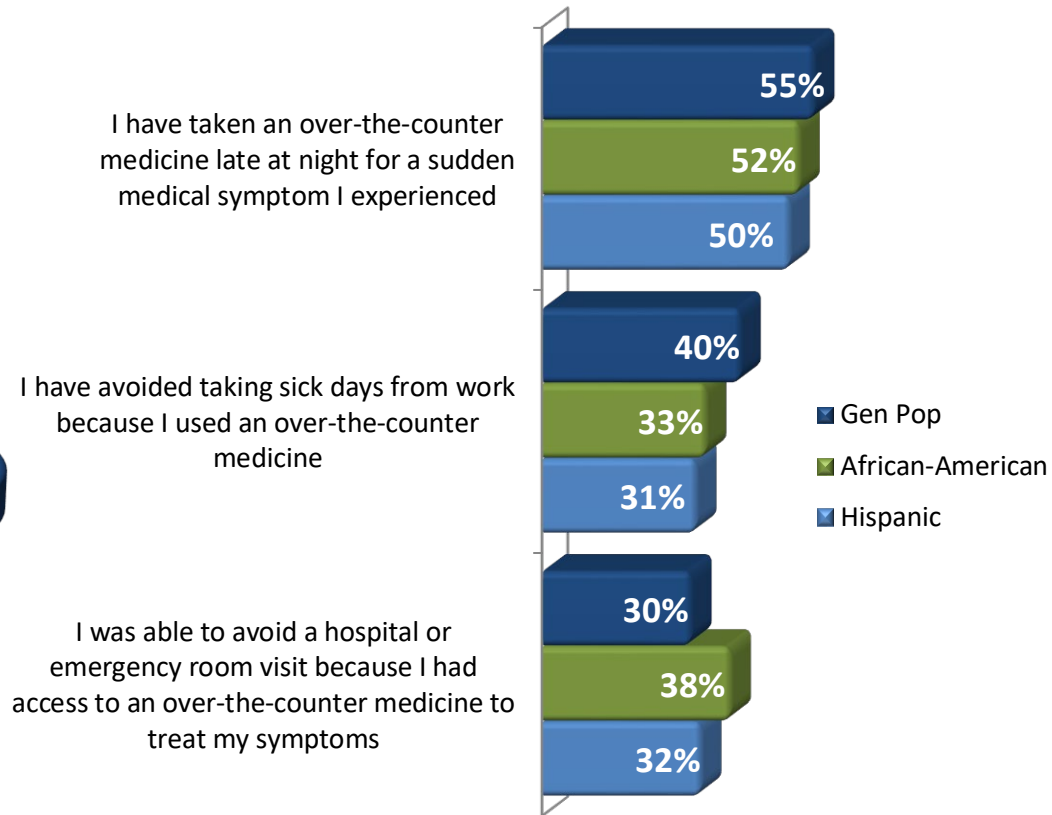
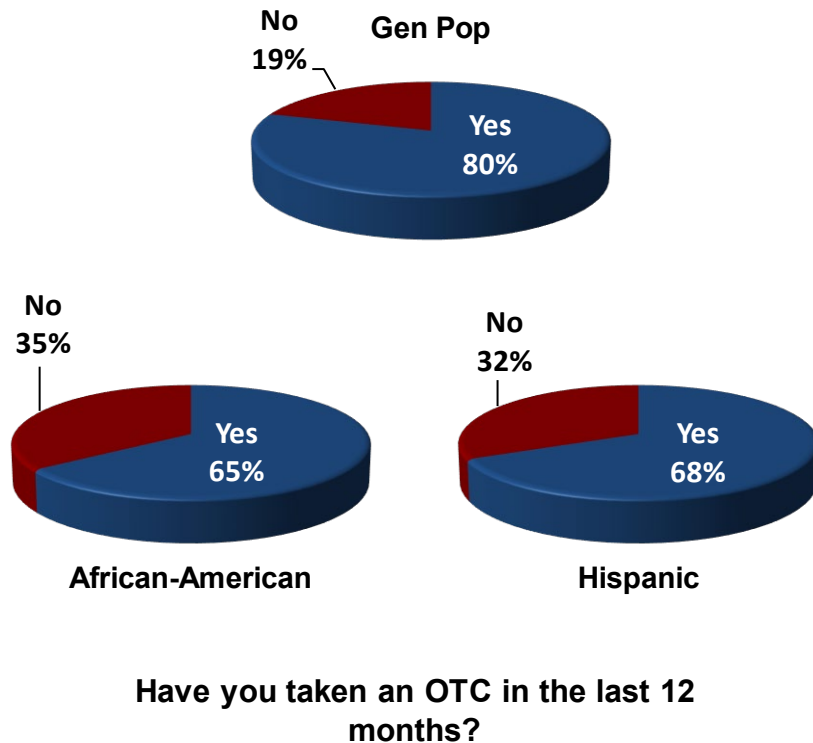
Consumers:

Over-the-Counter Medicine Use



OTC Use in the Past Year

Most adults in the US have used an over-the-counter medicine in the last year, though OTC use is significantly lower among African-American and Hispanic consumers than among the general population. In the last year, OTCs have helped consumers avoid missing days from work and provided more than half with a late-night solution for sudden symptoms.

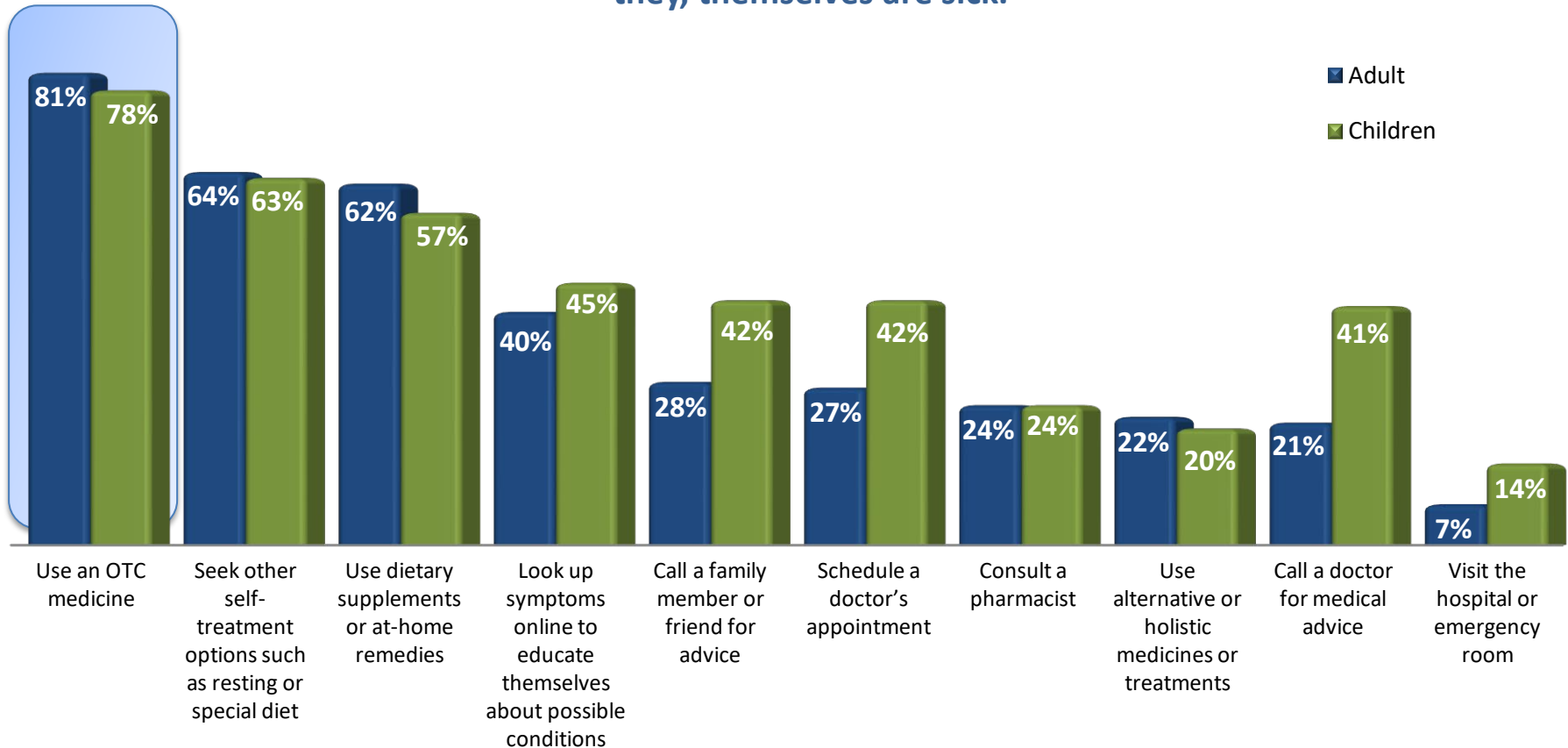


- In the past 12 months, have you taken an over-the-counter medicine to treat a minor ailment such as a headache, fever, cold or upset stomach?
- Please indicate whether or not each of these are things that have happened in the past 12 months.



First Responses to Minor Ailments

More than three-quarters (78%) see over-the-counter medicines as an appropriate first response to minor ailments in children. Parents are looking for their own solutions for their children’s ailments, but are more likely to call a doctor or schedule an appointment when their child is sick than when they, themselves are sick.

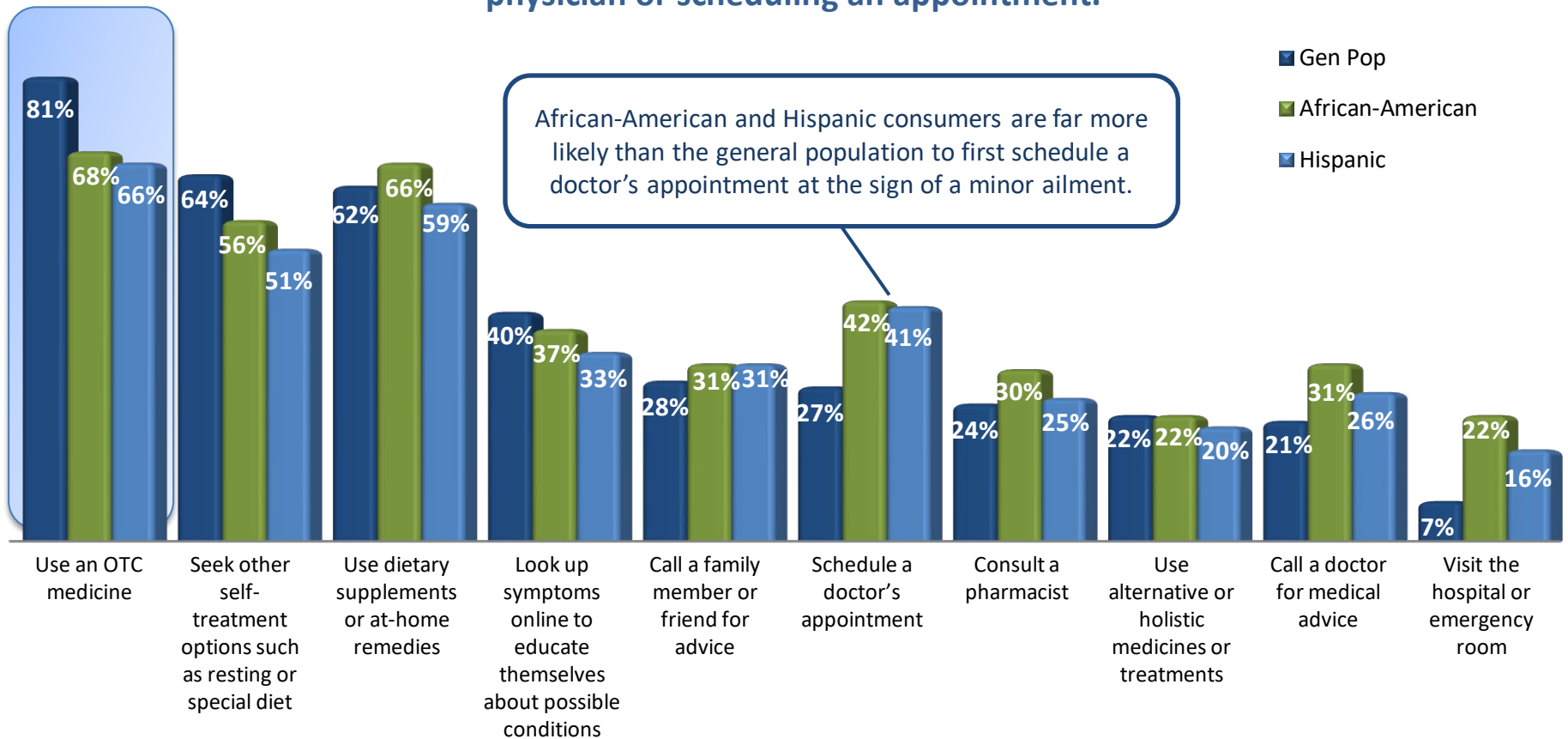


- When you experience minor ailments such as headache, fever, cold or upset stomach, which of the following are the first things that you do?
- When one of your children experiences minor ailments such as headache, fever, cold or upset stomach, which of the following are the first things that you do? (Note: Asked only of parents)



First Responses to Adult Minor Ailments

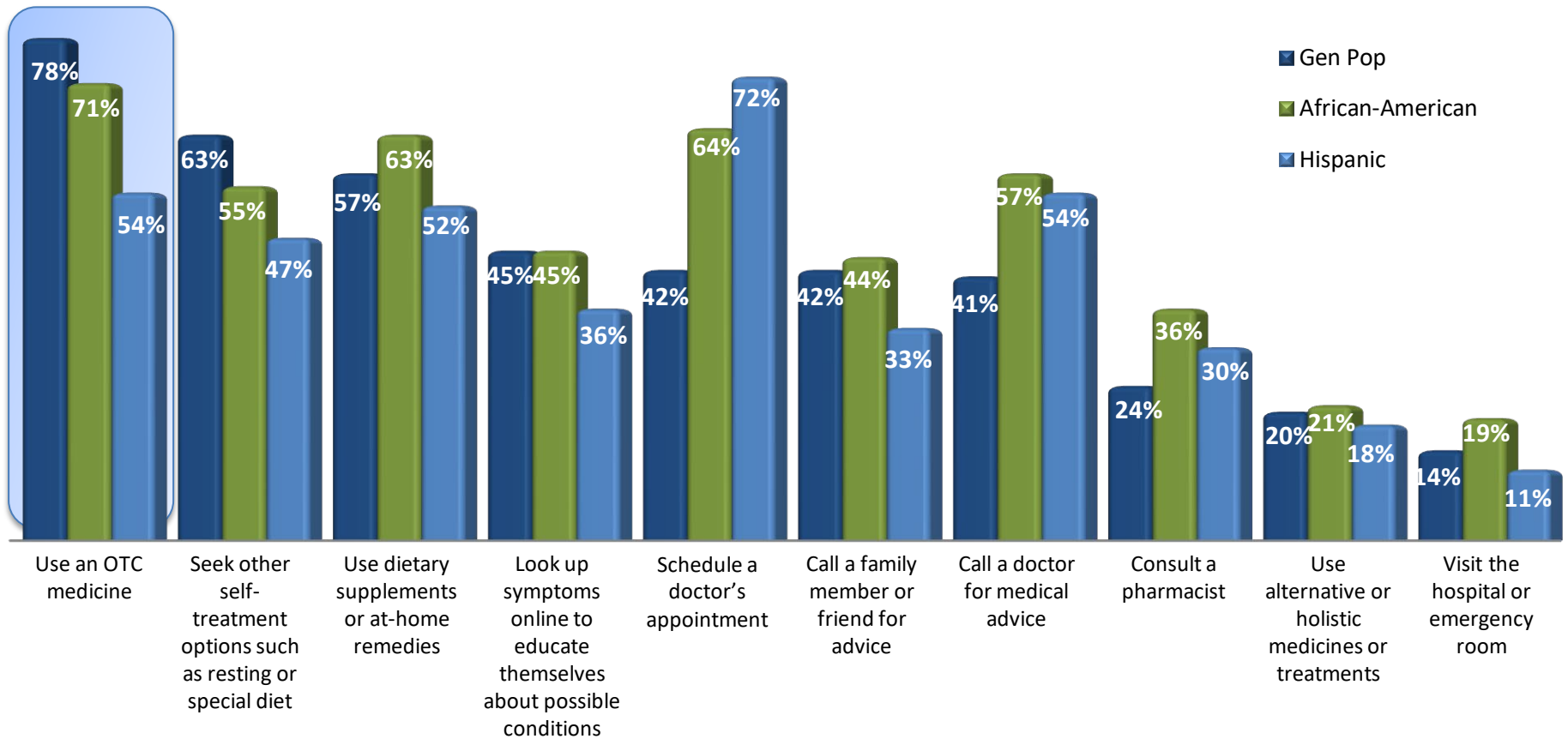
In fact, most adults in the US consider over-the-counter medicines their go-to first response to symptoms of minor ailments. Adults in the US are likely to try a number of self-treatment options, like using OTCs, resting, using at-home remedies and consulting online resources before calling a physician or scheduling an appointment.





First Responses to Children's Minor Ailments

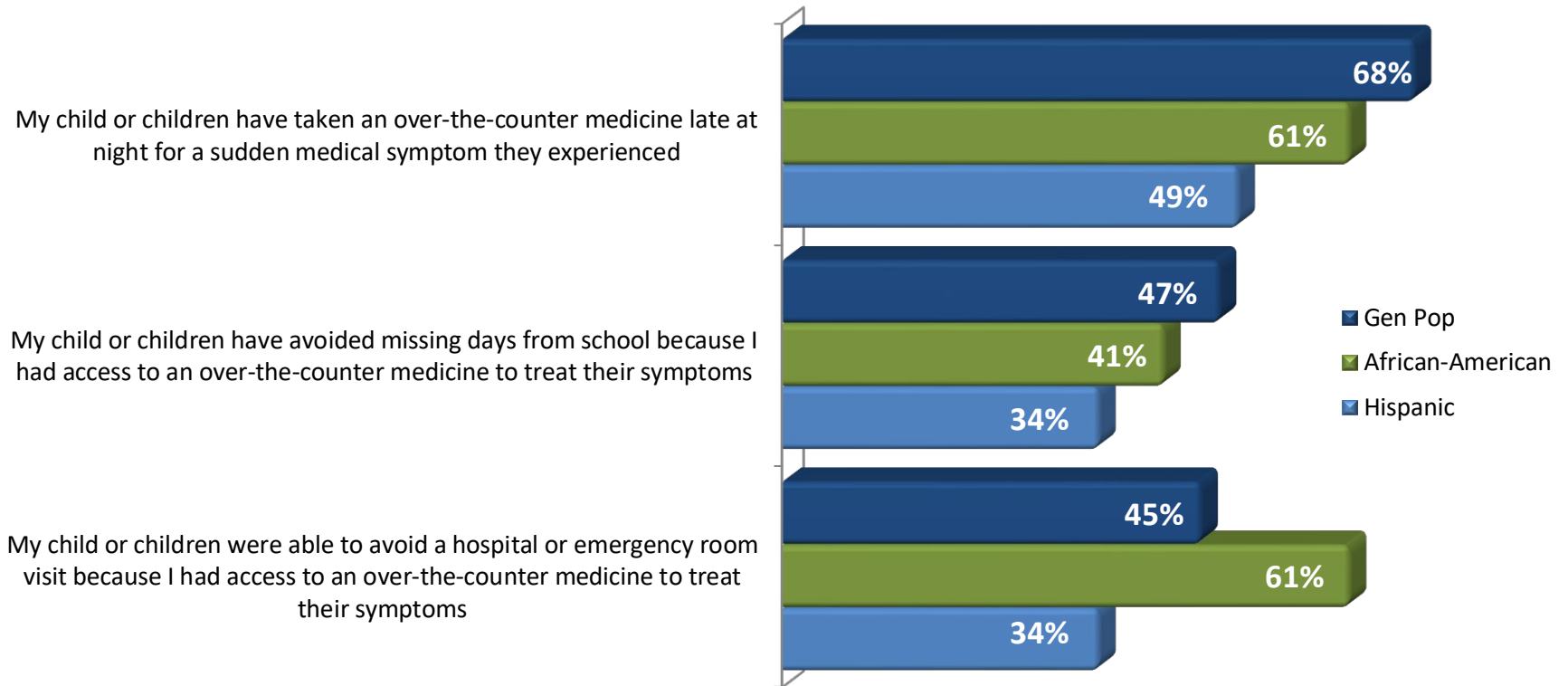
Hispanic parents are far less likely to use over-the-counter medicines when their children exhibit symptoms of minor medical ailments. Both Hispanic and African-American parents are more likely than the general population to consult a physician at the sign of these symptoms.





OTC Use Among Children

The availability of OTC medicines are also very important to parents in the US. More than two-thirds of general population parents in the US say they have used OTC medicines late at night to help their children's sudden medical symptoms. Additionally, about half say their children have avoided missing school because they had access to OTC medicines.



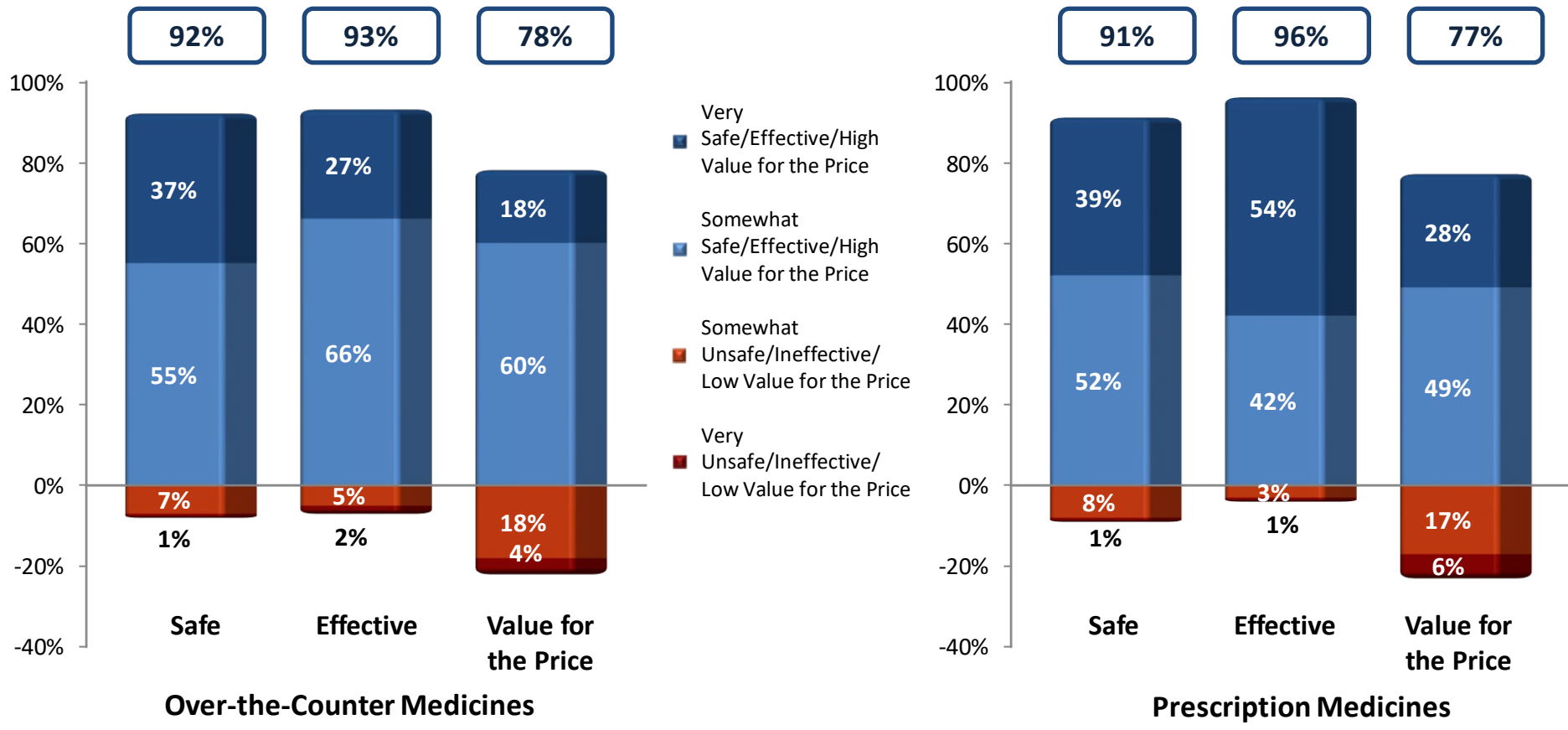
Consumers:

OTCs and Other Healthcare Options



Prescriptions vs. OTCs

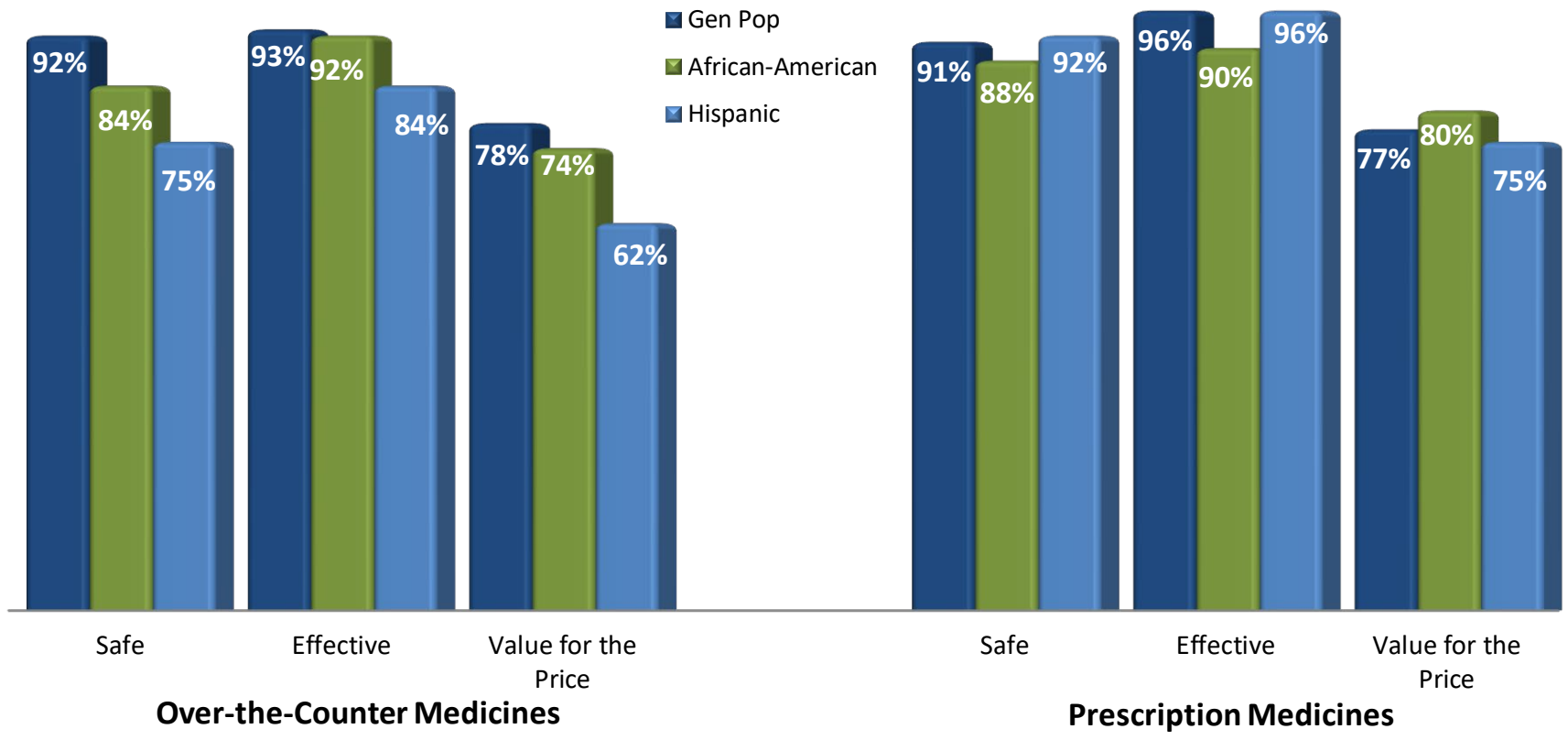
In general, US consumers see over-the-counter medicines as just as safe and effective as prescription medicines. They also believe both types of medicines provide high value for the money spent.





Prescriptions vs. OTCs Across Ethnicities

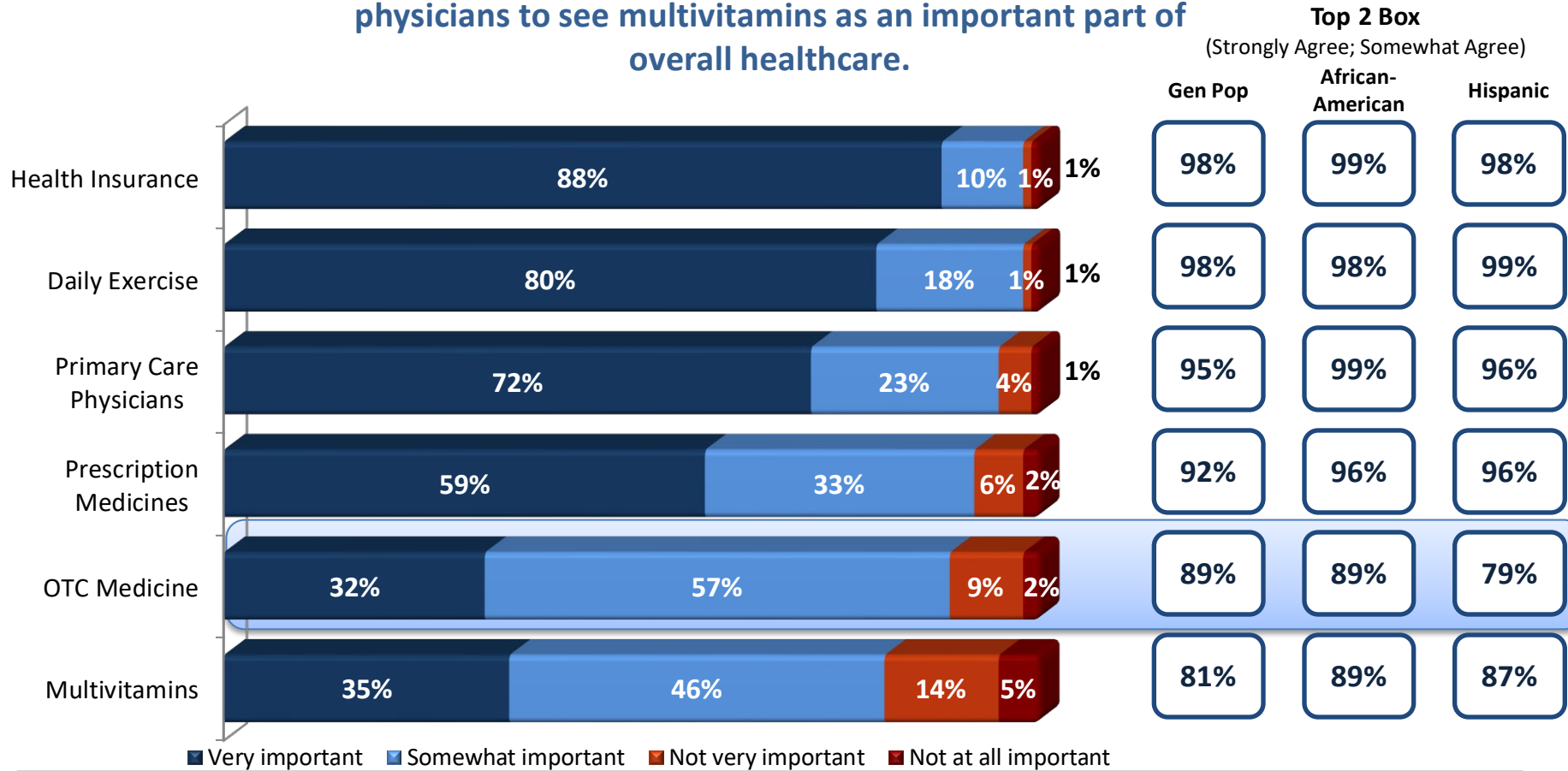
Hispanic consumers are more likely than others to believe prescription medicines are more safe and effective than over-the-counter medicines.





Importance of Health Care Options

89% of US adults see over-the-counter medicines as an important part of overall family health care. However, health insurance, daily exercise and primary physicians are seen as more important than these medicines – particularly among Hispanic consumers. Consumers are far more likely than physicians to see multivitamins as an important part of overall healthcare.

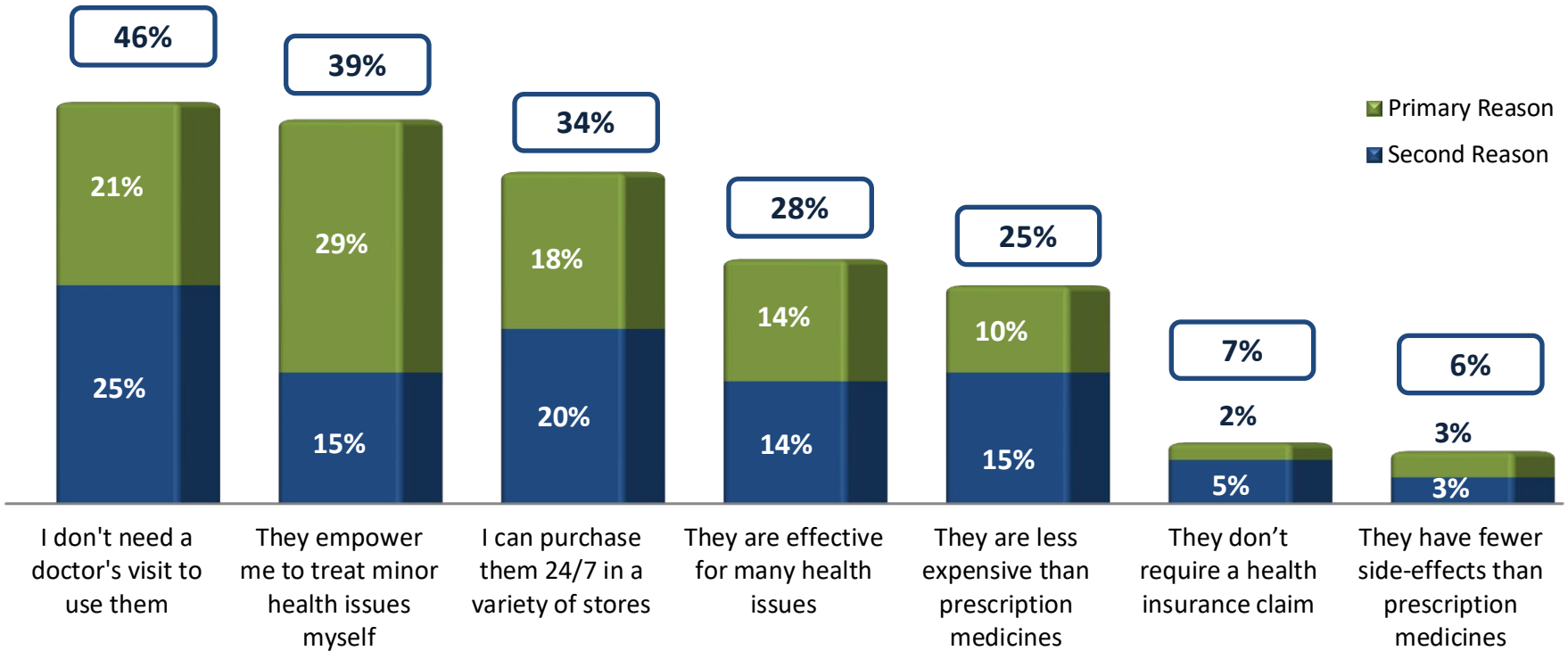


■ Very important ■ Somewhat important ■ Not very important ■ Not at all important



Top Reasons OTC Medicines Are Important

Accessibility, empowerment, effectiveness and affordability are all reasons consumers believe OTC medicines are important. Those who believe over-the-counter medicines are important say the top reasons for believing this way are that they don't need to make a doctor's appointment to use them, the medicines provide them with the ability to treat their own minor health issues, and they can be purchased anytime in a variety of stores.





Top Reasons OTC Medicines Are Important Across Ethnicities

All groups generally agree that the reasons OTCs are important are their accessibility, empowering nature and effectiveness. Hispanic consumers are more likely than others to cite the 24/7 access as the primary reason these medicines are important, while significantly more African-American consumers than general population consumers cite the affordability of the medicines.

	Gen Pop	African-American	Hispanic
I don't need a doctor's visit to use them	46%	37%	43%
They empower me to treat minor health issues myself	44%	37%	37%
I can purchase them 24 hours a day, 7 days a week in a variety of stores	39%	39%	47%
They are effective for many health issues	29%	22%	18%
They are less expensive than prescription medicines	25%	32%	29%
They don't require a health insurance claim	7%	14%	8%
They have fewer side-effects than prescription medicines	6%	9%	6%

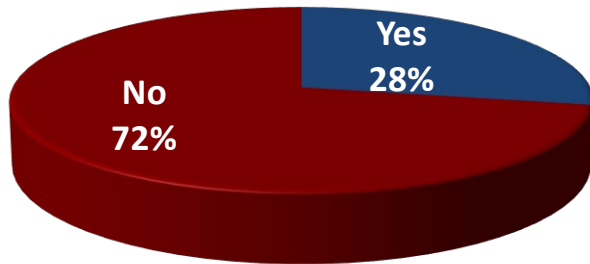
Consumers:

New FSA Legislation



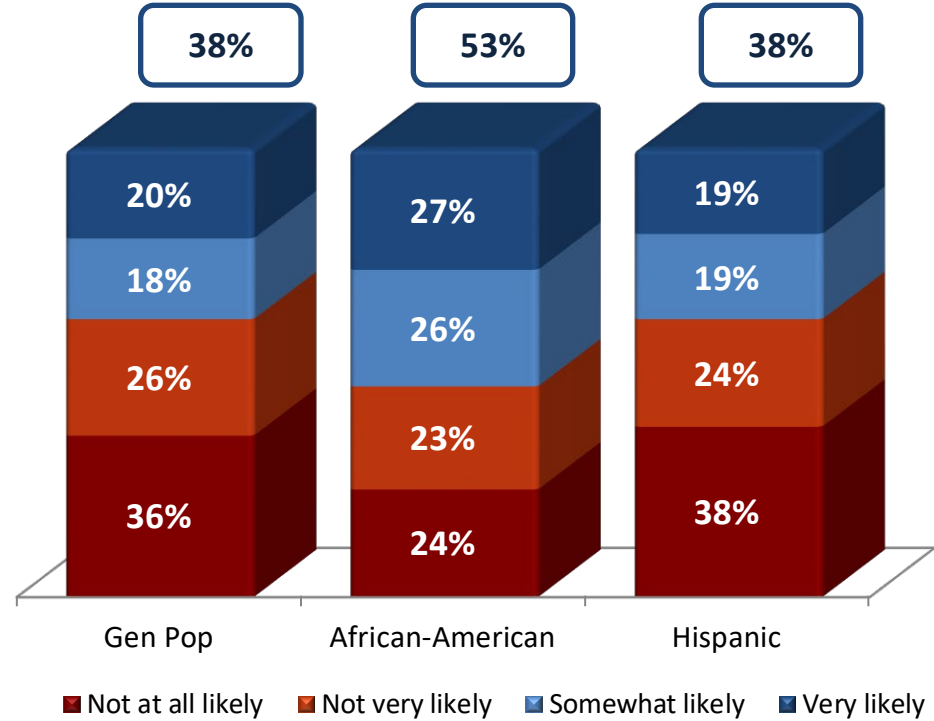
New FSA Legislation

About one-in-five consumers surveyed participate in a flexible spending account. Within this group, nearly three-quarters (72%) were unaware that in January, consumers will be required to obtain a prescription for over-the-counter medicines in order to be reimbursed through their FSA. As a result, few consumers (38%) say they are likely to seek such a prescription, indicating the increased burden on medical professional may not be as significant as physicians expect.



Awareness of New FSA Legislation

Likelihood to Seek an Rx for an OTC Medicine



- Were you aware of this new ruling?
- How likely are you to seek out a doctor's prescription in order to be reimbursed for your over-the-counter medicine purchases?



Demographics

		Gen Pop	African American	Hispanic
Age	18 – 24	10%	4%	11%
	25 – 34	17%	10%	17%
	35 – 44	19%	23%	30%
	45 – 54	21%	20%	14%
	55 – 64	16%	18%	14%
	65+	17%	25%	14%
Gender	Male	48%	42%	39%
	Female	52%	58%	61%
Region	Northeast	24%	22%	12%
	Central	22%	17%	16%
	South	31%	54%	42%
	West	23%	8%	30%
Ethnicity	White/Caucasian	76%	0%	0%
	Black/African-American	10%	100%	0%
	Hispanic/Latino	10%	0%	100%
	Asian	3%	0%	0%
Employment	Full-time	46%	42%	45%
	Part-time	10%	6%	13%
	Unemployed	12%	14%	13%
	Retired	20%	27%	13%
	Homemaker/Caregiver	6%	3%	11%
	Student	2%	2%	1%
Health Insurance	Yes	86%	86%	75%
	No	14%	14%	25%
FSA	Yes	22%	23%	14%
	No	76%	75%	84%

		Gen Pop	African American	Hispanic
No. of Children	None	61%	63%	45%
	1	16%	16%	16%
	2	13%	13%	15%
	3	5%	7%	12%
	4	4%	1%	9%
	5 or more	2%	1%	2%
Age of Children (% of HH with children)	0 to < 1	10%	5%	13%
	1 to < 3	20%	15%	20%
	3 to < 6	31%	24%	35%
	6 to < 12	47%	48%	57%
Marital Status	12 to < 18	44%	47%	50%
	Married	66%	44%	68%
	Living with someone	1%	1%	4%
	Never married	18%	26%	16%
	Separated/Divorced/Widowed	15%	28%	12%
Education	HS or less	32%	47%	53%
	Tech/Vocational School	2%	2%	1%
	Some College	23%	21%	23%
	College Grad	27%	16%	13%
	Grad/Professional School	15%	13%	9%
HHI	< \$25k	19%	29%	34%
	\$25k to < \$50k	19%	27%	27%
	\$50k to < \$75k	18%	13%	11%
	\$75k to < \$100k	14%	12%	5%
	\$100k to < \$150k	11%	7%	8%
	\$150k to < \$200k	4%	2%	3%
	\$200k+	4%	2%	2%

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