

WHAT ARE THEY THINKING?

SDI's Pharmaceutical Company Image 2010 study is published at the end of June. **James Chase** previews some of the early findings on the views of both healthcare professionals and consumers

Physicians, perhaps unsurprisingly, have a much higher overall opinion of the pharmaceutical industry than do consumers. Not only that, but far more consumers have lowered their opinion of pharma in the past year than have physicians. These are just two of the findings of the latest SDI Pharmaceutical Company Image study.

The study surveyed physicians (6,340 responses), pharmacists (387), nurse practitioners/physician assistants (942), managed care executives (69) and consumers (2,005) between March and April 2010, via online questionnaires.

According to the results, 56% of physicians have a “somewhat or extremely positive” view of the pharma industry overall, down from 59% in 2009, with just 17% reporting a “somewhat or extremely

negative” opinion (see Fig. 1). “I think that as long as the pharma industry is meeting [physician’s] needs and getting them the innovative drugs and the information on the drugs that they are prescribing, their views will be generally positive,” says Jason Fox, associate director, syndicated analytics, at SDI. “It’s at least a decent view of the industry overall.”

Conversely, just 16% of consumers have a “somewhat or extremely positive” view of pharma, down from 17% in 2009, with just 45% reporting a “somewhat or extremely negative” opinion (Fig. 2). Although this number was down slightly in 2009, when consumers were asked “Has your overall opinion changed in the past year?” 37% said their opinion had become “somewhat or much more negative” in the past year.

“I think some of it has to do with healthcare reform,” says Fox. “Probably, pharma companies get looped in with insurance companies—the whole view of them being profiteering and not having the patient in mind, etc. Consumers in general are likely to have more of a negative impact than physicians because doctors are working with these companies on a day-to-day basis. Consumers don’t have as much ready access to the scientific piece of it, so they are more likely to react negatively.”

When it comes to what sources physicians think provide the most useful information about pharma products in general, non-pharma-sponsored medical conferences and meetings (74%) and medical journal articles (73%) scored far higher than any other source (Fig. 3), followed by medical reference books (47%) and other healthcare professionals (46%).

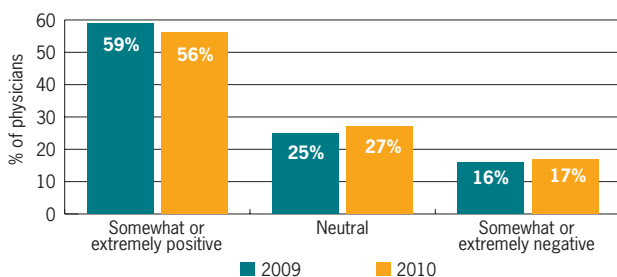
“Physicians trust more the sources that are non-company-sponsored,” notes Fox. Interestingly, sales reps scored just 43%, while pharma-sponsored materials (33%) and medical journals ads (23%) scored even lower.

Physicians were also asked to name the top sources for providing information on the costs of drugs (Fig. 3). The top sources cited were pharmacists (64%), followed by sales reps (58%). “It’s not surprising that pharmacists are at the top because lots of times doctors are dealing with copay issues,” says Fox. “Similarly with sales reps, probably doctors are dealing with formulary status and copays etc.”

What’s interesting is that 56% of physicians said patients were a key source of information on drug prices. Fox attributes this to patients “complaining” to the doctor of the cost of treatments during office visits.

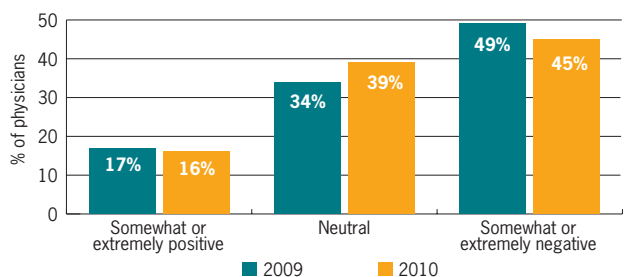
One new topic for this year’s survey was mergers and acquisition

Fig. 1: Physicians: What is your opinion of the pharmaceutical industry as a whole?



Source: SDI's Pharmaceutical Company Image 2010

Fig. 2: Consumers: What is your opinion of the pharmaceutical industry as a whole?



Source: SDI's Pharmaceutical Company Image 2010

Fig 3: The top five sources that physicians think provide the most useful information about pharmaceutical products

Source	% of Physician Respondents
Medical conferences/symposia/group meetings (sponsored by medical organizations)	74%
Articles in medical journals	73%
Medical reference books (e.g., PDR, Facts & Comparisons)	47%
Other healthcare practitioners (doctors, NPs, PAs)	46%
Sales reps	43%
Medical conferences/symposia/group meetings (sponsored by pharmaceutical companies)	42%
Internet	34%
Material from pharmaceutical companies	33%
Ads in medical journals	23%
Pharmacists	20%
Direct-to-consumer advertising	9%
Patients	9%
News media	6%
Other	2%

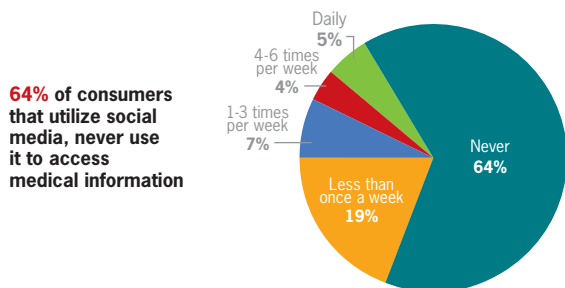
Source: SDI's Pharmaceutical Company Image 2010

in the pharma industry. Healthcare professionals were asked if they were aware of any M&As over the past year. Just 30% of physicians reported that they were aware of any M&As, while only 25% of NPs/PAs and pharmacists said they were aware of any activities (Fig. 4). “A lot of times doctors don’t really associate with the pharma company; they associate the sales rep with the drug,” says Fox. “It seems weird to me that a company such as Pfizer in a multibillion dollar merger [with Wyeth] is not even on their radar screens.”

At the other end of the scale, a whopping 86% of managed care executives reported that they were aware of M&As in the past year. Fox is not surprised. “They are more aware of whom they are dealing with,” he says. “They are thinking ‘How is the change in corporate leadership going to affect my contracting?’”

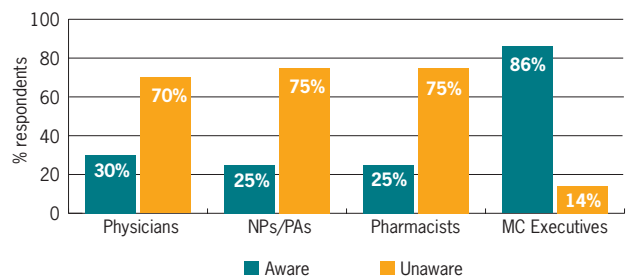
Consumers were also asked whether they used cost-saving measures (coupons, vouchers, samples discount cards, etc.) to purchase prescription products and, if so, where they sourced these cost-saving measures. Just 27% of consumers reported that they did use cost-saving measures. Of those, 51% said they acquired the cost-measure at the physician’s office, 33% at the pharmacy, 21% from the internet,

Fig. 5: Consumers: How often do you use social media as a source of medical information? (only asked of consumers who use social media)



Source: SDI's Pharmaceutical Company Image 2010

Fig. 4: Can you recall any of the mergers and acquisitions that took place in the pharma industry over the last year?



Source: SDI's Pharmaceutical Company Image 2010

14% from magazines and 11% from newspapers.

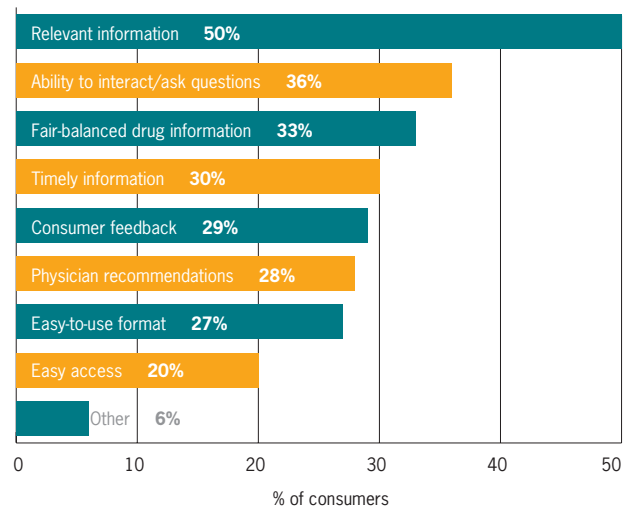
“We were a little surprised that only 27% said they utilized [cost-saving measures],” says Fox, suggesting that many consumers might not know the options available to them. He notes that there are an increasing number of guidelines pertaining to samples in the doctor’s office, which is changing the way the industry offers discounts. “They are replacing traditional supplies of, say, a week of samples with a coupon card, or a loyalty card or a co-pay reduction card or something along those lines.”

Another new topic for 2010 was social media usage. Consumers were first asked if they used social media at all. Those that reported they did were then asked how often they used it as a source of healthcare information. Interestingly, 64% said “never” (Fig. 5).

Lastly, consumers were asked what attributes would be most important to a pharma-sponsored social media site, such as a Facebook page or a YouTube channel (Fig. 6). By far the most popular answer was “relevant information” (50%), followed by “ability to interact” (36%) and “fair-balanced drug information” (33%).

SDI plans to make the full survey available on June 30. ■

Fig. 6: Consumers: If a pharma company sponsored a social site, which of the following attributes would be most important for the site to have?*



*Based on 3 consumer selections
Source: SDI's Pharmaceutical Company Image 2010