

2017 Direct to Consumer Advertising Survey Results

Presented by Princeton Survey Research Associates International

Prepared for PhRMA

Goals and Approach

Objective:

The purpose of the research was to learn about consumers' awareness of and opinions about direct to consumer advertisements of prescription medicines.

Methodology:

National Online Survey

52% took on smartphone

1,564 U.S. adults, age 18 and older

Data weighted to reflect U.S. adult population

Interviewing conducted April 7-11, 2017, by Princeton Survey Research Associates International

Key Highlights

- Viewership of DTC ads is widespread and recall is high
- Few specifically request a medicine they saw advertised and few receive
- DTC ads often prompt conversations about alternatives such as generics or lifestyle changes
- DTC ads prompt other behaviors, such as information-seeking and medicine adherence
- DTC ads are viewed favorably by many, particularly when informational aspects are emphasized

Demographic Profiles

Demographic Profile of Participants

Gender

- 46% Male
- 53% Female

Age

- 38% Millennials/Gen Y (ages 18-36)
- 25% Gen X (ages 37-52)
- 31% Boomers (ages 53-71)
- 6% Silent/Greatest (ages 72 or older)

Marital Status

- 56% Married or Living with partner
- 44% Divorced, Widowed, or Never married

Race/Ethnicity

- 66% White, non Hispanic
- 11% Black, non Hispanic
- 14% Hispanic

Education

- 38% Less than high school graduate & HS grad/GED
- 33% Some education after HS
- 30% Four-year college graduates

Health Profile of Participants

A large majority rate their health as at least good:

- 14% Excellent
- 39% Very Good
- 34% Good
- 13% Fair or Poor



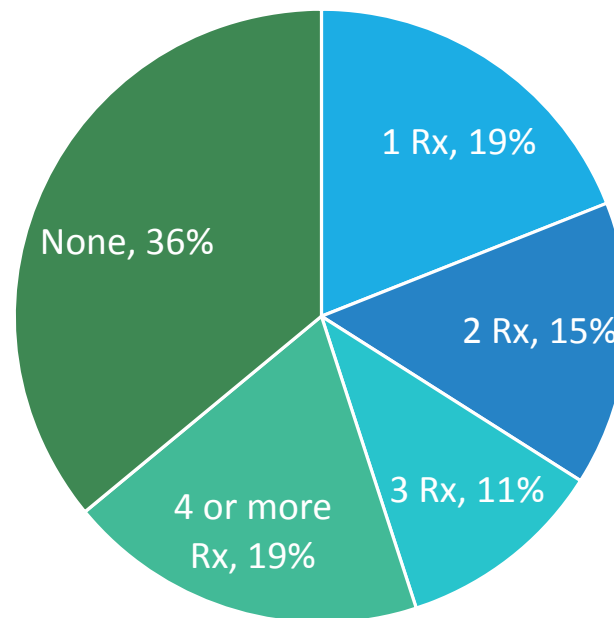
87%

However, 7 in 10 suffer from at least one chronic condition, including:

- 28% High blood pressure
- 26% Depression, Anxiety, or Other mood disorder
- 22% High cholesterol
- 21% Arthritis
- 16% Heartburn, Acid Reflux, or GERD
- 13% Insomnia or Sleep disorder
- 12% Asthma
- 10% Diabetes

Nearly 2/3 of Adults Surveyed Reported They Are Currently Taking At Least One Prescription Medicine

How many different prescription medicines are you now taking?



Seeing or Hearing DTC Ads

Viewership of Prescription Medicine Ads is Widespread

Have you EVER seen or heard each of these kinds of advertisements on TV, magazines, radio or online...?

86% say they have seen or heard ads for SPECIFIC MEDICINES
that you can only get with a physician's prescription



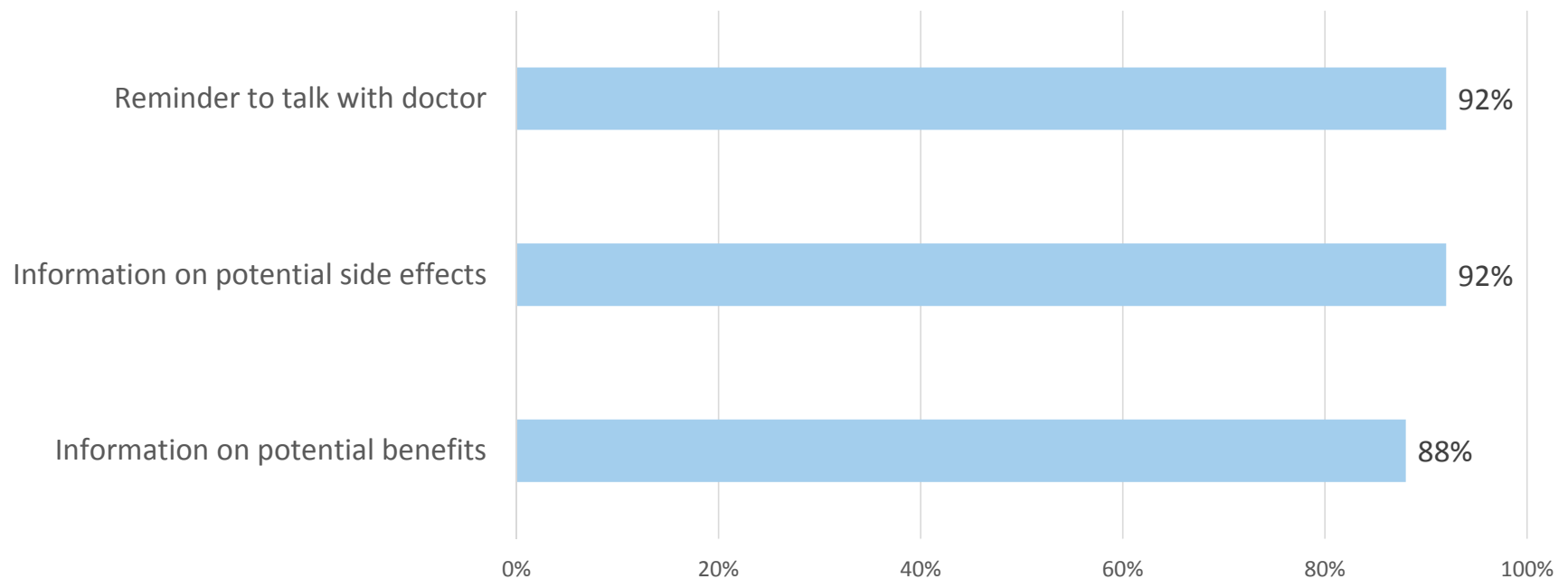
That share rises among relevant groups:
90% of those who have chronic condition
89% of those taking a prescription medicine

Recall and Ratings of DTC Ad Elements...

Large Majorities Recall Elements in DTC Advertising

In MOST ads you have seen for prescription medicines do you remember hearing or seeing...?

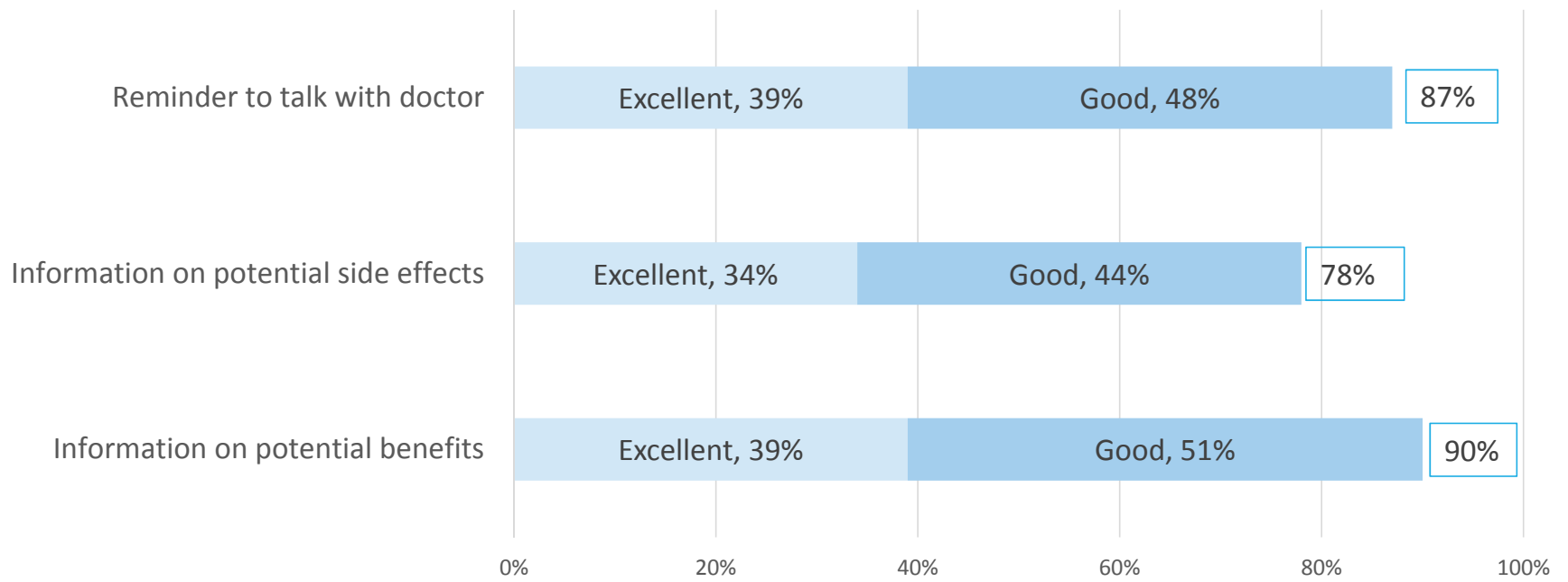
Based on those who have seen or heard DTC ads (n=1,369)



Large Majorities Favorably Rate Elements in DTC Advertising

Please rate the job ads for prescription medicines do in providing information about...

Based on those who have seen these elements in DTC ads

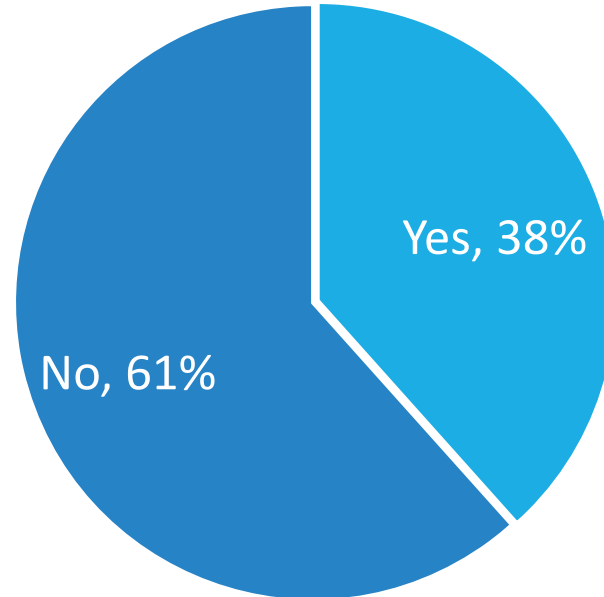


Talking with Physician about Medicines...

A Majority Have Never Talked with Physician About Advertised Medicine

As a result of seeing or hearing an ad for a prescription medicine, have you EVER talked with a doctor about a specific medicine you saw or heard advertised?

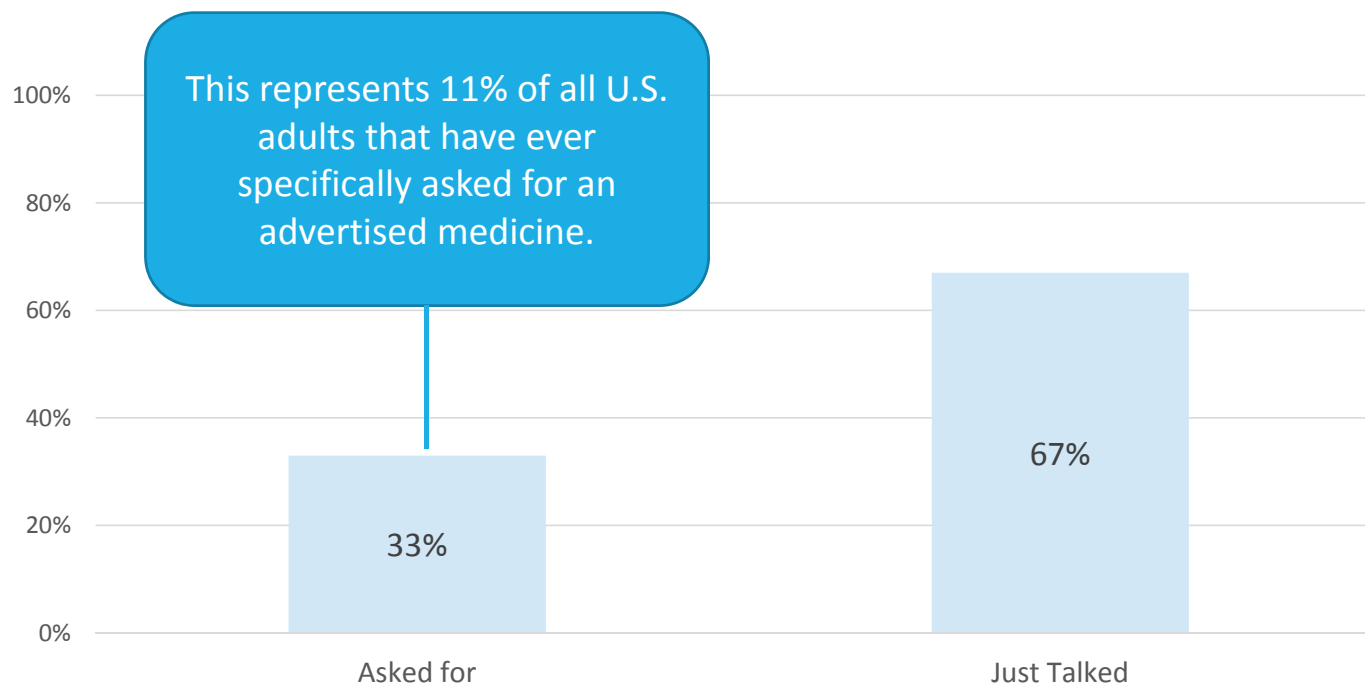
Based on those who have seen or heard DTC ads (n=1,369)



Most Just Talk with Physician about Medicine

Did you SPECIFICALLY ASK a doctor to prescribe the medicine you saw or heard advertised or did you JUST TALK with the doctor about the medicine?

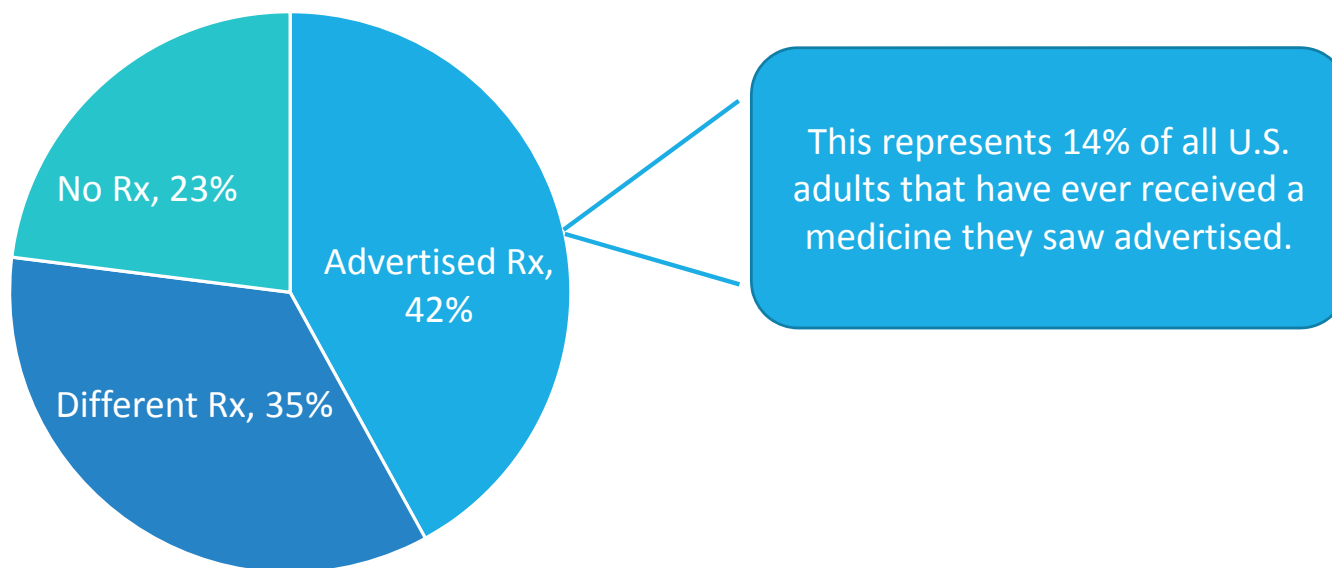
Based on those who talked with physician as a result of DTC ad (n=529)



Most Don't Receive the Medicine They Discussed with Their Physician

Did the doctor give you a prescription for the medicine you saw or heard advertised, OR give you a prescription for a different medicine, or not give you any prescription at all?

Based on those who talked with physician as a result of DTC ad (n=529)



Treatment Alternatives Discussed with Physician

During your discussion with your doctor about the advertised prescription medicine, did you talk about...

Based on those who talked with physician as a result of DTC ad (n=529)

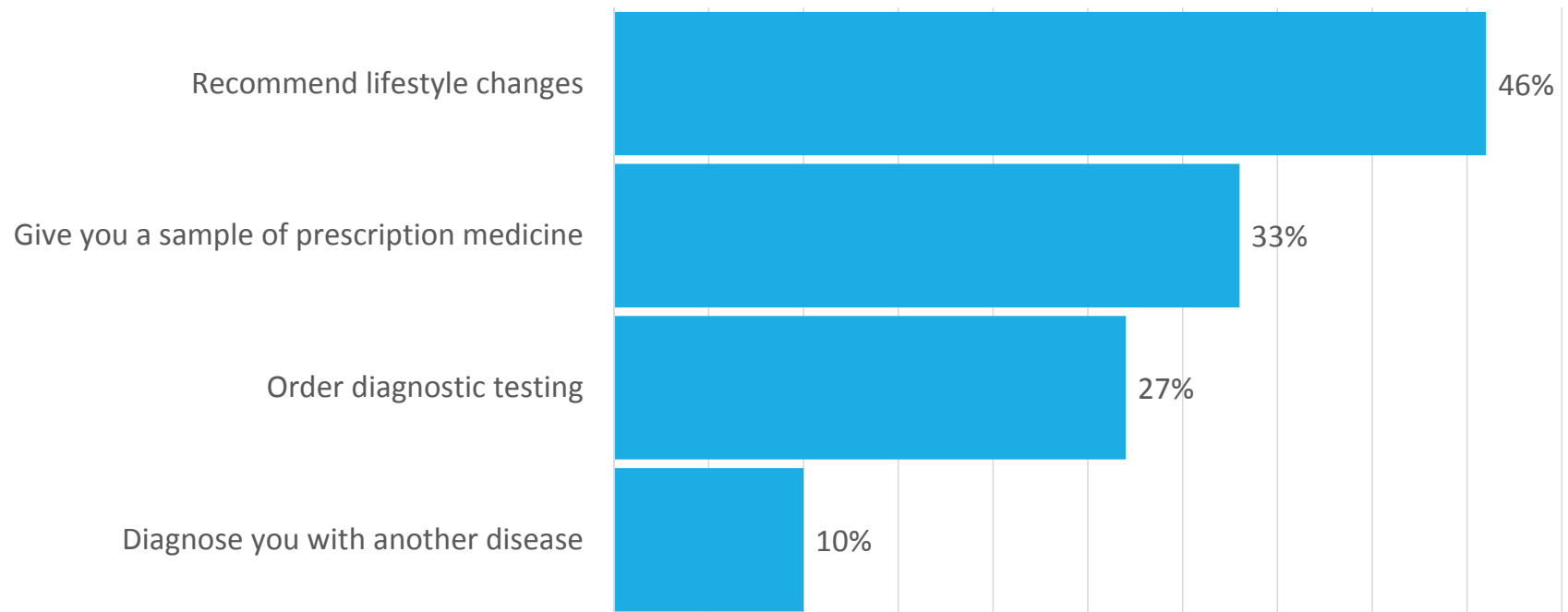
Nearly 9-in-10 Have Discussed Alternatives to Advertised Prescription Medicine, such as...

- 50% talked about generic alternatives
- 40% talked about a different prescription medicine
- 32% talked about non-prescription alternatives, such as over the counter medications

Other Outcomes of Patient-Physician Discussions Are Common

During your discussion with your doctor about the advertised prescription medicine, did your doctor...

Based on those who talked with physician as a result of DTC ad (n=529)



DTC Ads Also Prompt Asking About New Conditions or Illnesses

As a result of seeing or hearing an ad for a prescription medicine, have you EVER talked with a doctor about a medical condition or illness you had not talked about before?

Based on those who have seen or heard DTC ads (n=1,369)

35% talked to physician about a new medical condition or illness



Other Responses to DTC Ads...

DTC Ads Prompt Information-Seeking for Many

Has seeing or hearing an ad for a prescription medicine EVER caused you to look for information about...?

Based on those who have seen or heard DTC ads (n=1,369)

62% Looked for Any Information...

- 33% looked for information about a condition advertised medicine treats
- 29% looked for information about a prescription medicine they were taking
- 24% looked for information about a prescription medicine friend or family were taking



DTC Ads Prompt Information-Seeking About Existing Prescriptions

Has seeing or hearing an ad for a prescription medicine EVER caused you to look for information about...?

Based on those who have seen or heard DTC ads (n=1,369)

Some of the groups who were prompted by DTC ads to look for more information about a prescription medicine they were taking are:

- 46% of those who talked with their physician about advertised medicine
- 40% of those in fair or poor health
- 34% of those currently taking a prescription medicine
- 34% of those with a chronic condition
- 31% of those with a regular physician

DTC Ads Serve as an Adherence Reminder

Has seeing or hearing an ad for a prescription medicine EVER reminded you to...

Based on those who have seen or heard DTC ads (n=1,369)

60%
Reminded
of Any

- 28% reminded to schedule appointment with physician
- 27% reminded to get a preventative vaccine or flu shot
- 23% reminded to take their prescription medicine
- 21% reminded to get prescription refilled



DTC Ads Serve as Reminders, Especially for Those with Chronic Conditions

Has seeing or hearing an ad for a prescription medicine EVER reminded you to...

Based on those who have seen or heard DTC ads (n=1,369)

Those with chronic condition(s) are more likely than those without a condition to be reminded:

	Respondents WITH Chronic Conditions	Respondents WITHOUT Chronic Conditions
To schedule an appointment with their physician	30%	22%
To get a preventative vaccine or flu shot	29%	22%
To take their prescription medicine	26%	16%
To get a prescription refilled	25%	12%

Disease Awareness Ads

Four in Ten Recall a Disease Awareness Ad

Have you EVER seen or heard each of these kinds of advertisements on TV, magazines, radio or online...?

43% of U.S. adults say they have seen or heard ads that talk about a medical condition or illness BUT DO NOT MENTION a specific medicine or treatment for it

Among those who have seen or heard a disease awareness ad, 37% say they have ever talked with their physician about the disease or symptoms described in the ad

Attitudes Towards DTC Advertising

Many View DTC Ads as Educational

How strongly do you agree or disagree with each statement?

