



2020 Pharmaceutical Patient Experience Survey

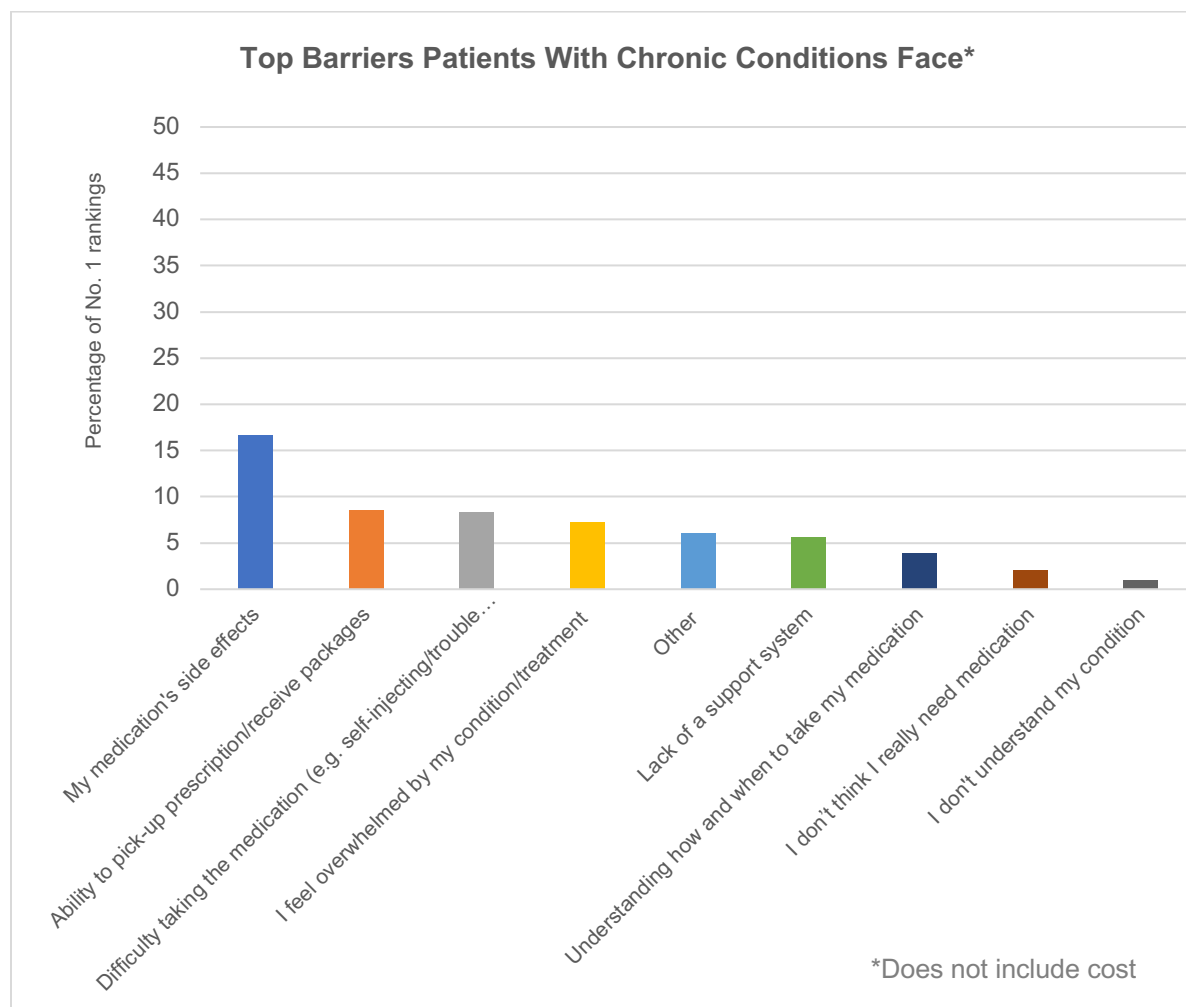
Improving the treatment experience for patients is the goal of many pharma marketers and patient services teams, as [6 out of 10 adults](#) in the U.S. have a chronic medical condition. Human Care Systems conducted a survey of more than 1,000 patients with chronic or complex conditions who are taking one or more medications to find out what the patient experience on therapy is truly like, commonly encountered challenges related to access and adherence, and what support they use, prefer, and expect from the manufacturer of their medications. The results elucidate several opportunities for pharma-driven patient support services. Some key findings include:

- People experience various difficulties around starting their medications and continuing to take them as prescribed, leading to suboptimal behaviors that result in non-adherence.
- While patients report a clear desire for support from pharma manufacturers, many are unaware of resources and services that are already being offered by the manufacturers of their medication(s).
- The more serious their health condition, the more support patients want from the manufacturer of their medication(s).
- Many patients want to receive support via phone. However, various digital channels have become increasingly important for drug manufacturers looking to support medication access and adherence with an integrated, omni-channel treatment experience for patients.

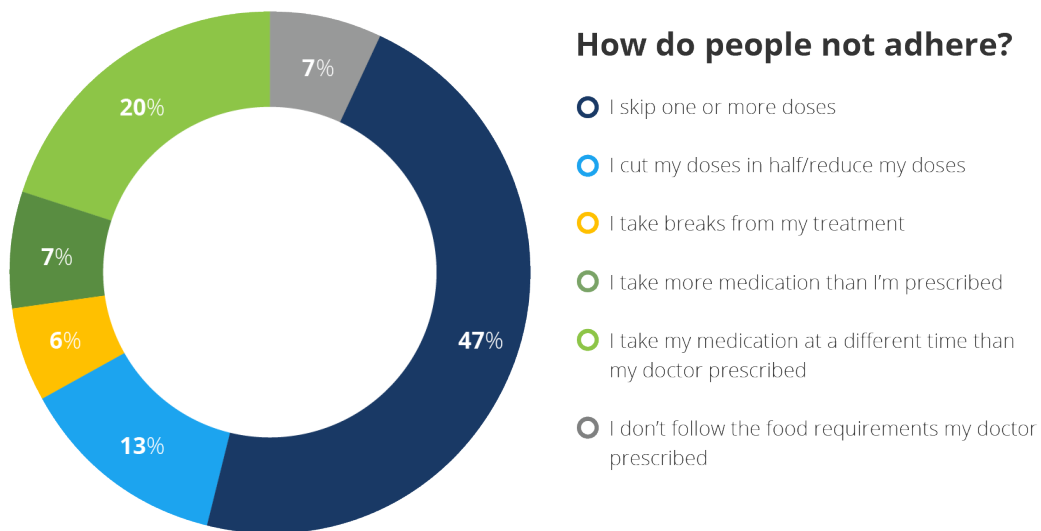
Medication adherence is one of healthcare's greatest and most costly challenges. Non-adherence is [estimated](#) to cause approximately 125,000 deaths in the United States annually, costing the U.S. health care system up to \$289 billion a year. It is a nuanced and multi-factorial challenge, and patients' needs while on treatment are highly differentiated. Support from manufacturers needs to be personalized and scalable in order to connect to, and improve, the patient experience.

Myriad Medication Adherence Hurdles

The vast majority (86 percent) of respondents take more than one medication to manage their chronic condition(s), with 44 percent taking four or more medications. While most respondents (80 percent) feel confident in managing their condition, nearly all report barriers to adhering to their medication regimens as directed. When asked to rank the top barriers they faced when it came to adhering to their medication(s), 41 percent of patients reported that cost was the No. 1 barrier and nearly 17 percent ranked side effects as the No. 1 barrier. While these may be common challenges that are expected to interfere with medication adherence, patients face a broader range of barriers that often go unconsidered. For example, 8.5 percent of people cited their ability to pick up their prescription or receive packages as the top barrier to adherence, while 8.3 percent of people cite difficulty administering their medication.



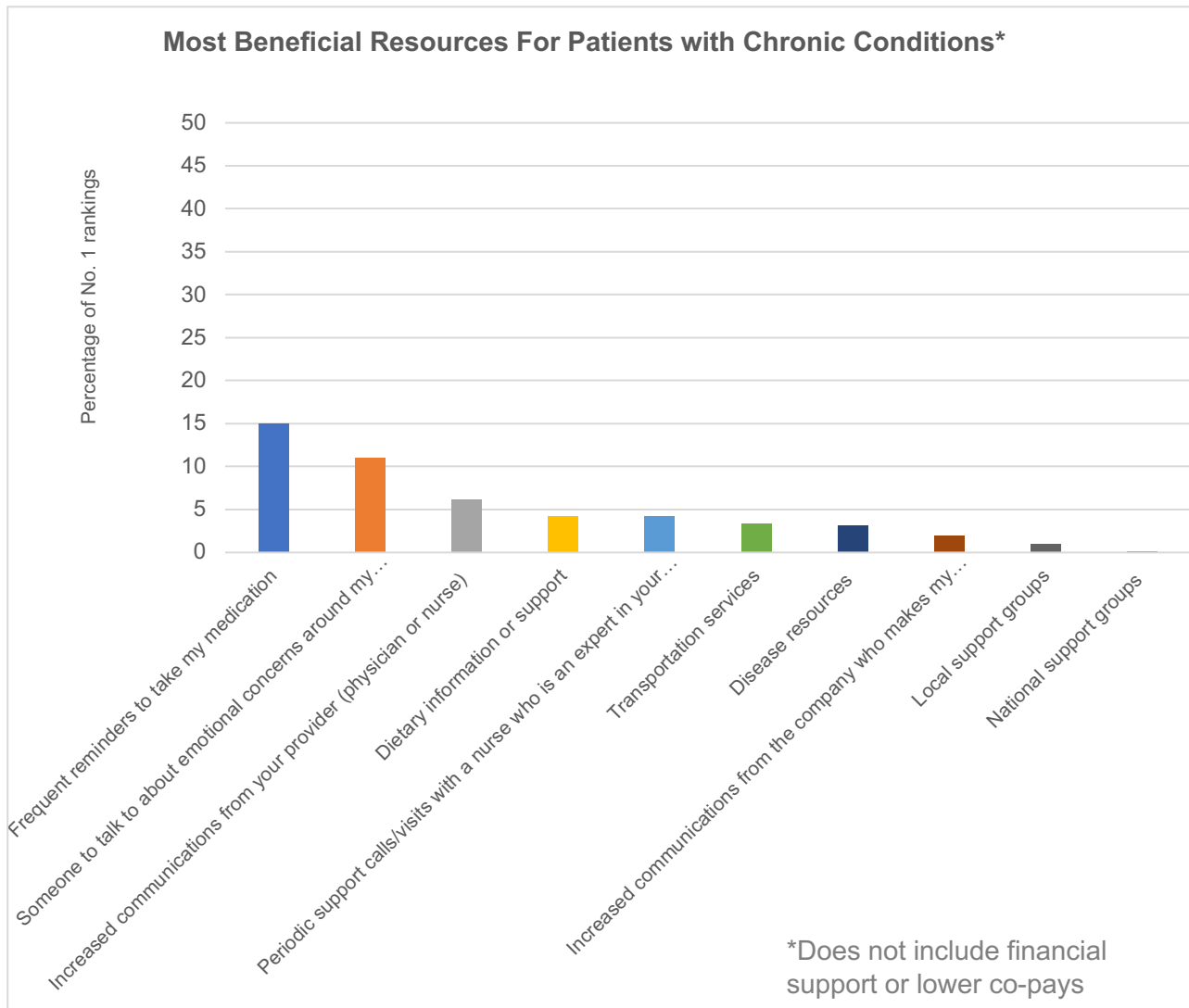
Experiencing these types of challenges during treatment leads to non-adherence. The World Health Organization (WHO) defines *adherence* as “the extent to which the persons’ behavior (including medication-taking) corresponds with agreed recommendations from a healthcare provider”.¹ It includes the *initiation* of the treatment, *implementation* of the prescribed regime, and *discontinuation* of the pharmacotherapy.² WHO reports that adherence among patients with chronic diseases averages only 50 percent in developed countries. Human Care Systems’ survey took a deeper look at the types of non-adherence behaviors people display. Of the respondents who admitted to not taking their medication as prescribed, 47 percent said they skip doses, 20 percent take the medication at a different time than recommended, 13 percent reduce their dose, 7 percent take more medication than prescribed, 7 percent don’t follow food requirements and 6 percent take self-decided breaks from treatment.



Any of the above behaviors could lead to safety and efficacy concerns when not monitored by a physician, and all of the behaviors can be prevented by offering curbed by pharma-driven support services and education while on therapy.

Awareness Does Not Match Demand for Pharma-Driven Patient Services

In terms of the support people want and need to overcome their challenges, financial and co-pay support (50 percent) are among the top five, as well as frequent medication reminders (15 percent). People are also craving a companion to talk to about their medication and emotional concerns while dealing with disease and treatment (11 percent). More than 6 percent said increased communications from a physician or nurse would be most beneficial, and 4 percent said calls/visits from a nurse who is an expert in the medication the patient is on would be most helpful.

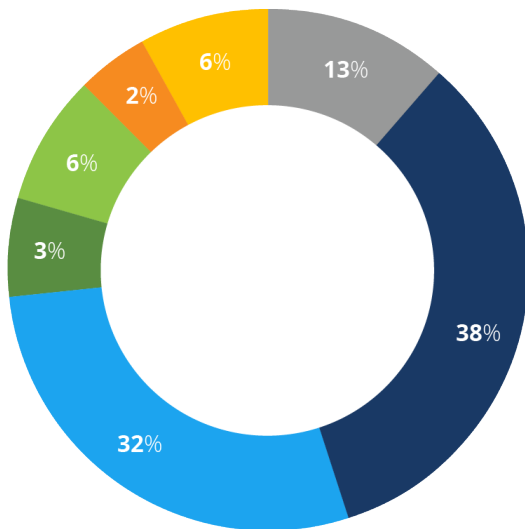


Patients may seek additional forms of support because they perceive limited access or value from current channels. For example, 42 percent report that their prescriber is less than optimally accessible for questions about their medications, and nearly 20 percent reported not feeling supported by their physician when it comes to their medication(s). Support from pharma is one way to close that gap. Some 57 percent of respondents believe that pharma companies should offer patient support services, and 63 percent of those with complex or chronic conditions say that they would opt in. Those with cancer and lupus are even more likely to opt in (73 percent for cancer, 86 percent for lupus), showing that the more serious the health condition, the greater patients desire support from the manufacturer of their medication(s). Despite high demand, only 1 in 5 people (20 percent) are even aware of the patient support services that are currently offered by drug manufacturers, and even fewer (2.5 percent) actually report utilization of pharma-provided services.

Tailored, Omni-Channel Treatment Experience is Key

Patients have varying preferences when it comes to what kind of support will be most beneficial in navigating treatment challenges. About 38 percent of respondents reported that their preference would be a phone call from a nurse or nurse educator who is an expert in their case or condition, and 32 percent said they would prefer an email with relevant information about their medication and living with their condition. Some 13 percent prefer text messaging. The remaining 17 percent prefer a different digital channel, such as video chat, click-to-chat, or Facebook Messenger. About 63 percent of millennials (26- to 34-year-olds) prefer a tech-based interaction when it comes to discussing their medication, while 47 percent of cancer patients would prefer to communicate about their medication via tech-based interaction. Several studies investigating the efficacy of non-adherence interventions show that the most effective approach to improving medication adherence combines several channels and strategies into one integrated experience.^{3,4}

Patient Preferred Communication Channels



- Text Messaging
- Phone call from a nurse or nurse educator who is an expert in your case or condition
- Email relevant information about your medication and living with your condition
- Video chat with a nurse, nurse educator or provider who is an expert in your case or condition
- Click-to-chat messaging with a healthcare professional who is an expert in your case or condition
- Facebook Messenger with a healthcare professional who is an expert in your case or condition
- Other

Conclusion

Patient experiences and needs while on treatment are highly differentiated. Navigating common challenges patients face is difficult but issues such as cost, administration, side effects and drug interactions can be addressed with personalized support. Pharma-driven services and resources have been proven effective to support adherence throughout the patient journey, and now patients must be made aware that support exists. There is a significant opportunity for pharma marketing and patient services teams to provide patients with medication-specific knowledge as well as administration education and support, and to ensure that patient populations are aware of the various support services available to them. In addition, pharmaceutical companies should look to invest in personalized engagement platforms that support multiple channels of digital engagement to close the gap in ongoing educational and emotional support that patients experience while they navigate a prescribed medication regiment.

Methodology

Human Care Systems collected responses via a third-party provider from 1,140 U.S.-based patients, 18 years and older, who currently take one or more medications for chronic conditions such as cancer, diabetes, hypertension, heart failure, cystic fibrosis, hepatitis, chronic kidney disease, rheumatoid arthritis, lupus, gastroenteritis, migraine, macular degeneration, Crohn's disease, ulcerative colitis, ankylosing spondylitis, high cholesterol, asthma, COPD, depression and/or anxiety. HCS used the responses to determine the findings of its 2020 Pharmaceutical Patient Experience Survey.

1. E. Sabaté, *Adherence to Long-Term Therapies: Evidence for Action*, World Health Organization, Geneva, Switzerland, 2003.
2. B. Vrijens, S. de Geest, D. A. Hughes et al., "A new taxonomy for describing and defining adherence to medications," *British Journal of Clinical Pharmacology*, vol. 73, no. 5, pp. 691–705, 2012.
3. 3. Viswanathan, M., Golin, C. E., Jones, C. D., Ashok, M., Blalock, S., Wines, R. C. M., ... & Sista, P. (2012). *Medication adherence interventions: comparative effectiveness. Closing the quality gap: revisiting the state of the science. Evidence Report/Technology Assessment No, 208.*
4. Zullig, L. L., Peterson, E. D., & Bosworth, H. B. (2013). *Ingredients of successful interventions to improve medication adherence. JAMA, 310(24), 2611-2612.*

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