

# Healthcare opportunities abound

How consumers look after their health has many implications for the pharmaceutical industry.

**Sheryl Coughlin** reveals Deloitte's latest *Global Survey of Healthcare Consumers*, which examines the behaviours, attitudes and unmet needs of consumers in 12 countries.

**Sheryl Coughlin**

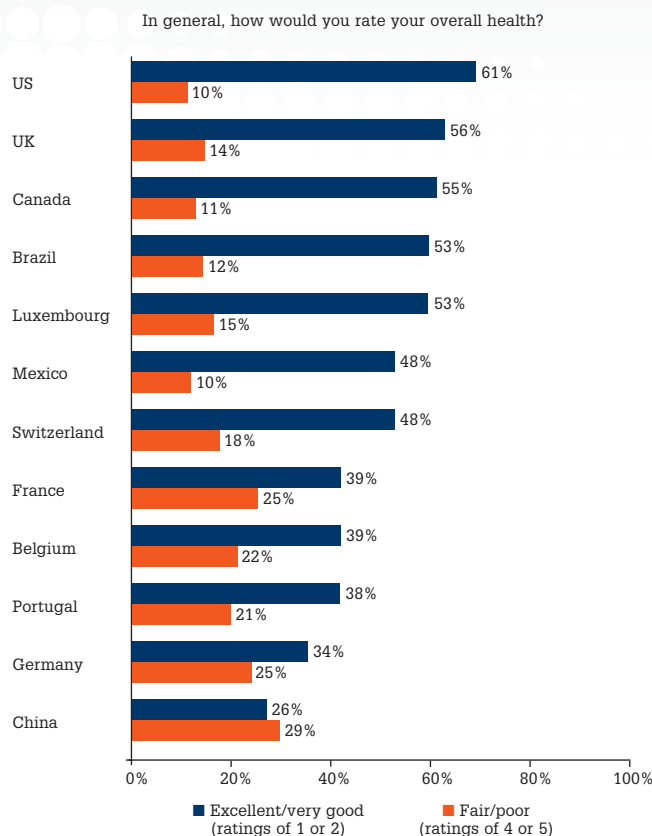
Sheryl Coughlin's expertise covers healthcare research, organisational strategy and performance management in private and public sector healthcare organisations. She has worked in Hong Kong, Singapore, Australia and the US.



Interested in exploring how consumers actively manage their health, Deloitte surveyed more than 15,000 adults in 12 countries (Belgium, Brazil, Canada, China, France, Germany, Luxembourg, Mexico, Portugal, Switzerland, the UK and the US) in early 2011. Among the findings was the fact that prescription medication use varies across these countries due to differences in disease prevalence, practice variations, insurance coverage and cultural norms when it comes to taking medication.

In addition, consumers vary in the extent to which they are actively involved in seeking a better understanding of treatment options, engaging in dialogue with medical professionals to make treatment choices, basing purchasing decisions on cost considerations, integrating alternative therapies and adhering

**Figure 1. Self-reported health status.**



Source: Deloitte 2011 Survey of Healthcare Consumers

**Figure 2. Prescription medication use.**

All respondents		Among prescription medication users			
Country	% taking prescription medications on a regular basis	One prescription medication on a daily basis	Two prescription medications on a daily basis	Three or more prescription medications on a daily basis	One prescription medication on a regular but not daily basis
US	57	28	22	48	2
France	56	29	22	46	3
Belgium	54	36	21	39	4
Canada	50	34	23	41	2
Germany	49	37	25	36	1
Luxembourg	45	38	32	30	-
UK	43	35	23	40	2
Portugal	42	40	23	34	3
Brazil	40	51	27	20	3
Switzerland	39	40	23	34	3
Mexico	36	38	28	24	10
China	33	45	24	13	18

Figures are rounded and arranged in descending order of percentage of respondents taking a prescription medication on a regular basis.

Source: Deloitte 2011 Survey of Healthcare Consumers

“ Nearly half of prescription users in the US (48%) and in France (46%) take three or more medications on a daily basis. ”

to prescribed regimens. Anticipating that greater consumer engagement may lead to improved health and cost outcomes, the results of this survey point to opportunities for pharmaceutical manufacturers, healthcare providers and policy makers to meet consumers’ unmet healthcare needs.

**Health status**

While consumers believe themselves to be in good health, over half have a chronic health condition. Having ‘excellent’ or ‘very good’ health is self-rated by over half of US consumers (61%), the UK (56%), Canada (55%), Luxembourg (53%) and Brazil (53%) (Figure 1, page 17); however, around half of consumers say they have been diagnosed with one or more chronic conditions, ranging from 40% in Mexico to 55% in Germany and in the US.

**Prescription medication use**

Consumers use prescription medications and a mix of other products when managing a health problem or improving their health. Regular use of prescription medications ranges from around three in ten in China to almost six in ten in the US. Nearly half of prescription medication users in the US (48%) and in France (46%) take three or more medications on a daily basis (Figure 2).

Approximately four in ten Chinese respondents (42%) use over-the-counter medications, considerably more than in other countries, with 11% in the UK and 36% in the US. On average,

three in ten consumers in European countries regularly use vitamins and supplements to treat a health problem or improve their health, whereas more than six in ten consumers in the US and Canada do so.

Consumption of functional foods (such as cholesterol-lowering and probiotic products) to treat a health problem or improve health is lower, ranging from just under half of respondents in China (49%) to 19% of French respondents (Figure 3).

**Alternative therapies and conventional care**

Consistently across all countries, around one in five consumers integrates alternative therapies with conventional care. In China, 42% say they consulted an alternative-care practitioner or advisor in the previous year.

Between 9% and 25% of prescription medication users practise alternative and/or natural therapies in addition to prescription medication, except in Mexico (33%) and China (44%). Between 3% (France) and 15% (Brazil) report substituting an alternative treatment approach or therapy for prescription medication in the last 12 months. In China, over one in three report substituting an alternative approach.

**Information resources**

Online resources play an important role in providing information to consumers, with 25-50% of all consumers looking online for treatment information. This ranges from 26% in Belgium to 54% in Canada among all consumers and from 30% in Belgium to 58% in Canada among current prescription medication users.

Consumers in all countries consider academic medical centres and medical associations/societies as their most trusted sources of information about the effectiveness and safety of treatment options. Consumers have less trust in such information from pharmaceutical, biotech or medical device/

**Figure 3. Use of over-the-counter medications, vitamins/supplements and functional foods on a regular basis to treat a health problem or to improve health.**

Country	% using over-the-counter medications	% using vitamins or supplements*	% using functional foods**
Belgium	27	33	24
Brazil	15	29	31
Canada	27	64	43
China	42	51	49
France	18	22	19
Germany	27	42	22
Luxembourg	19	23	22
Mexico	27	55	43
Portugal	16	22	20
Switzerland	18	39	21
UK	11	43	32
US	36	68	34

\* Percentage of respondents who indicated they use vitamins/supplements on a regular basis to treat a health condition or to improve health.

\*\* Percentage of respondents who indicated they use functional foods such as probiotic yoghurts and cholesterol-reducing spreads on a regular basis to treat a health condition or to improve health.

Source: Deloitte 2011 Survey of Healthcare Consumers

product manufacturers, employers, insurers and government agencies. Internet search engines are not well-regarded as trusted sources of treatment information by most consumers in most countries.

### Purchasing decisions

Between 6% and 25% of all respondents report asking their doctor to prescribe a particular drug by name or brand or to ask whether it would be a better choice than the one prescribed. Between 13% and 27% of all respondents say they asked a pharmacist for his/her opinion about a medication that was prescribed by a doctor.

Depending on the healthcare system, cost is increasingly a motivating factor for some in their prescription medication purchases. In some countries, cost concerns prompt some prescription medication users to ask their doctors for generic drugs rather than brand-name drugs, as well as influence purchase decisions at the pharmacy counter.

Prescription medication users purchasing from a mail order or online pharmacy range between 1% and 4% (Luxembourg, Portugal, UK, Belgium, and Canada) to 26% (Germany) and 27% (US). Less than one in ten prescription medication users in all countries say they bought prescription medications from a source outside their country, with the exception of China (28%).

### Effectiveness, adherence and switching

Prescription medication users' confidence in drug efficacy and effectiveness is high, ranging from 56% (China) to 85% (Mexico). Complete confidence (a rating of ten on a ten-point scale) ranged from 6% (China) to 42% (Mexico), with most falling around the three in ten mark.

Adherence by prescription medication users is generally high, with those saying they stopped taking a medication sooner than was prescribed ranging from 5% (Germany) to 23%

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(China). Between 3% (Luxembourg) and 15% (US) admit changing the dosage or frequency of their medication without asking or telling their doctor.

A small number of prescription medication users report switching medications in the past 12 months. While this was mostly around one in ten, the range was from 4% in Portugal to 28% in China. Consistent across all countries, cost, side effects and a lack of effectiveness were key reasons for switching.

Consumers are clearly engaging in managing their healthcare: they look for information, adhere to instructions, consider alternatives, and seek value and effectiveness.

Given the extent of prescription medication use, it is clear that opportunities exist for pharmaceutical manufacturers, providers and policy makers to plot a course to better reach consumers, develop personalised and targeted products, position themselves as a trusted source of information, provide comparative information on treatment options, and develop strategies to more effectively engage with an active and involved consumer. ■