

Section 1: Consumer Challenges

Rx Adherence

PRESENTED BY
SARAH CLARK
ASSOCIATE DIRECTOR, MARKETING

 **HEALTHLINE MEDIA**



Compliance & Adherence Relationship

45%

Admit to sometimes **skipping** a dose of their Rx medication*

HALF

Admit to sometimes **stopping** their Rx medication without consulting their doctor**



ADHERENCE CHALLENGES

40% Either forget to take their Rx or say the dosage frequency is challenging

38% Credit their mental state (depression, anxiety, stigma) or alcohol/drug use dependency interferes

20% Rx medication inconvenience

13% Disruptive Rx side effects

Consumer Treatment Challenges

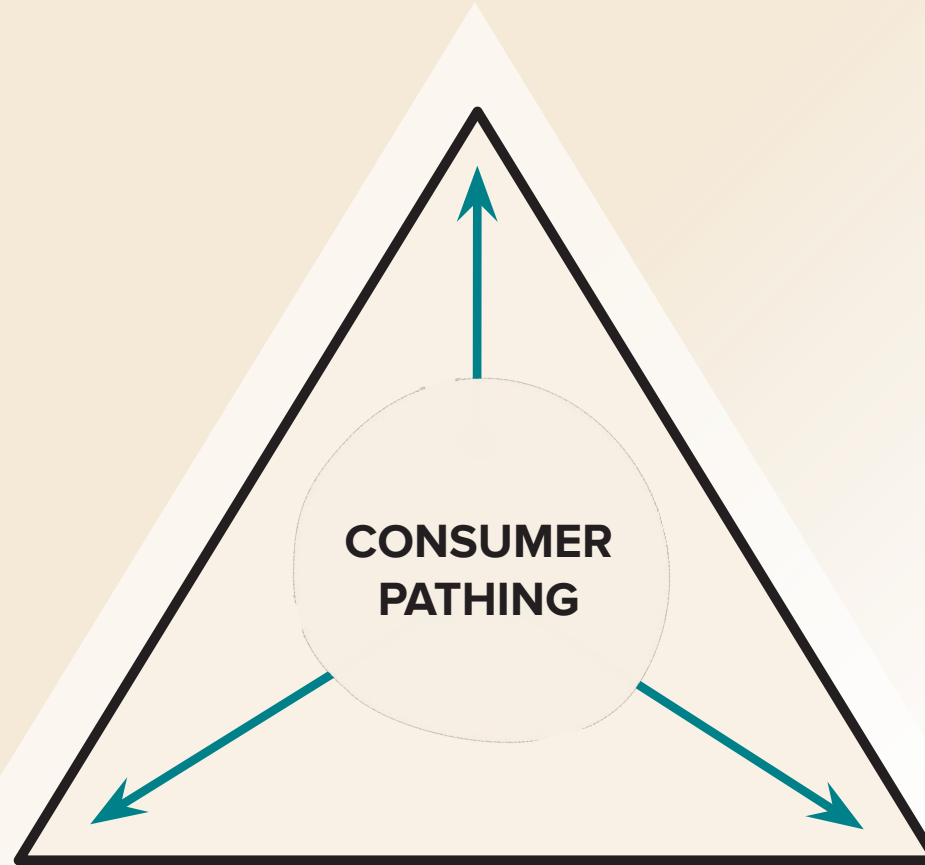
78%

Do their **own research** about treatment options

ONLY 10%
Consider brand.com as a resource for drug information

46%

Are dissatisfied with their **pharmacy** due to inability to compare prices for one Rx medication with others



47%

Contact their HCP to ask for less expensive or generic option*

Rx Savings Options

54%

Have **never used** an Rx discount card*

1 in 4

Use their Rx discount card 25%+ of the time*

OF THESE

90%

Are somewhat to very satisfied with their experience

89%

Would use it again



Rx Savings Messaging Opportunity

39%

Don't understand how Rx discount services work or where to start

1 in 4

Feel the price for a Rx using a discount service will still be more expensive than copay



Rx discount qualities they look for:

67% ease of use

52% cash price savings on Rx

50% can be applied across various Rx refills

42% strong reputation

41% extensive network of participating pharmacies