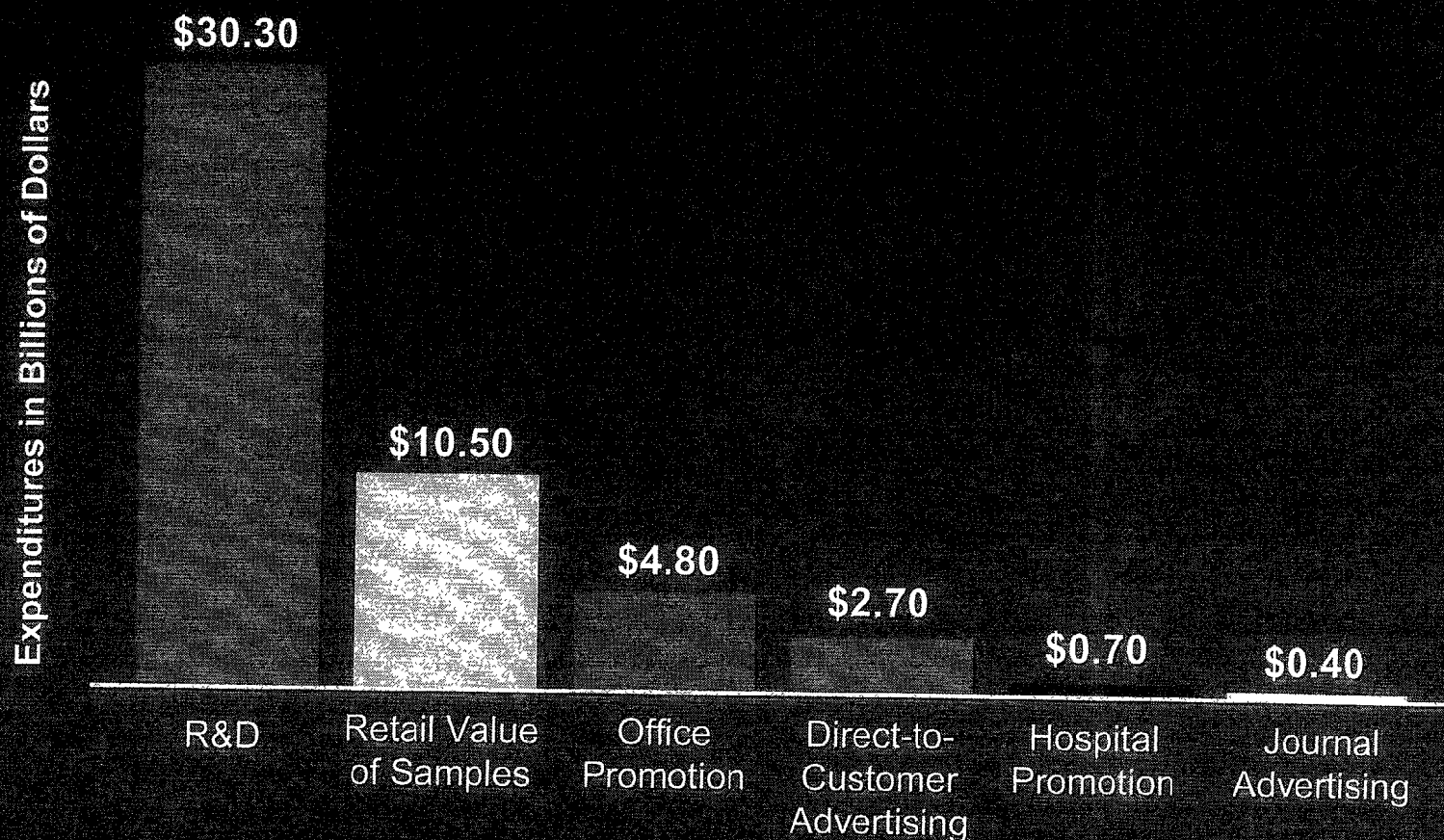


Economic Impact of DTC Advertising

Neal Masia, Ph.D.
Assistant Director, Economic Policy
Pfizer Inc.

Presented at the FDA DTC Public Hearing
September 23, 2003

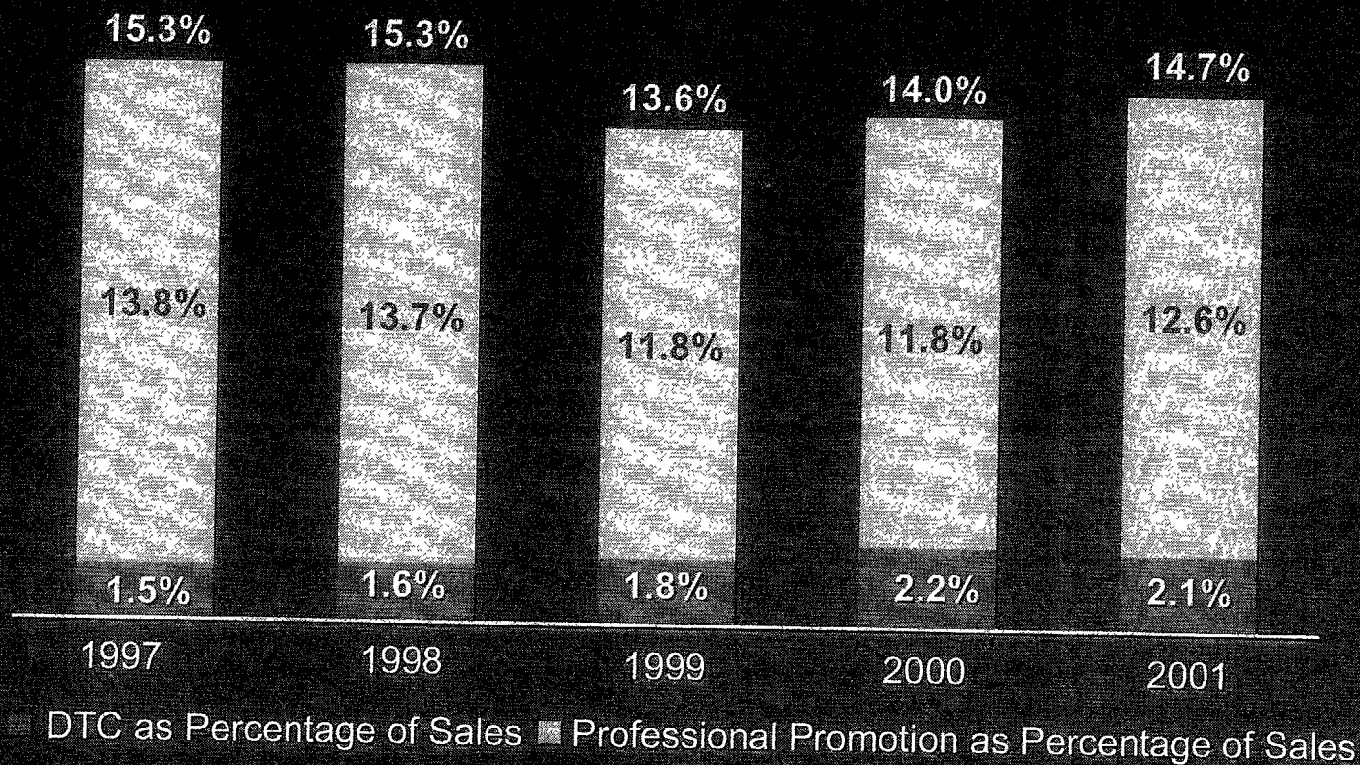
Pharmaceutical Industry's Annual R&D Investment Far Exceeds the Total Value of Marketing Spend, as Reported By GAO



Sources: R&D data: PhRMA. Promotional data: IMS Health, Integrated Promotional Services™ and CMR, 2002

The Industry's Total Marketing Spend Has Remained Flat, as a Percent of Sales

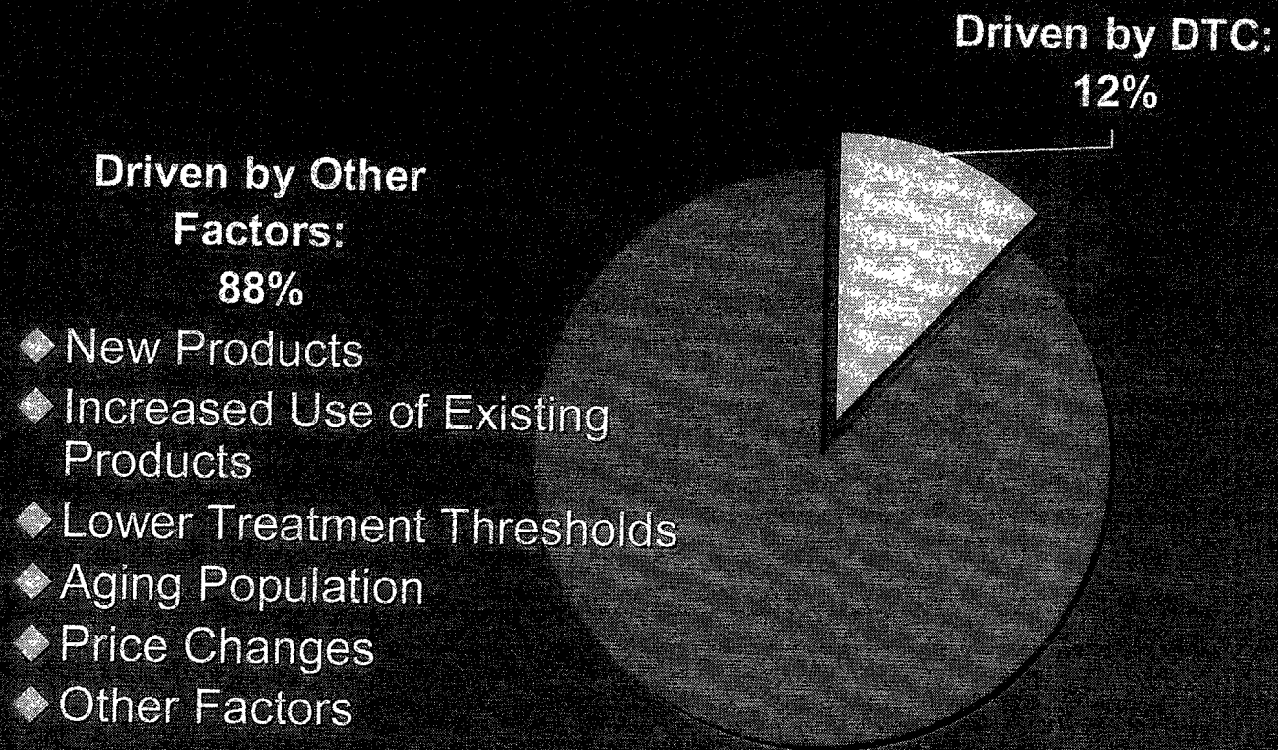
Sales and Marketing Spending as Percent of Total Sales (Including DTC as Share of Total), Major Pharmaceutical Firms, 1997-2001



Source: GAO (marketing data) and PhRMA (sales), following methodology of Berndt et al., "Promotion of Prescription Drugs to Consumers," *New England Journal of Medicine* V346, no. 7, February 14, 2002

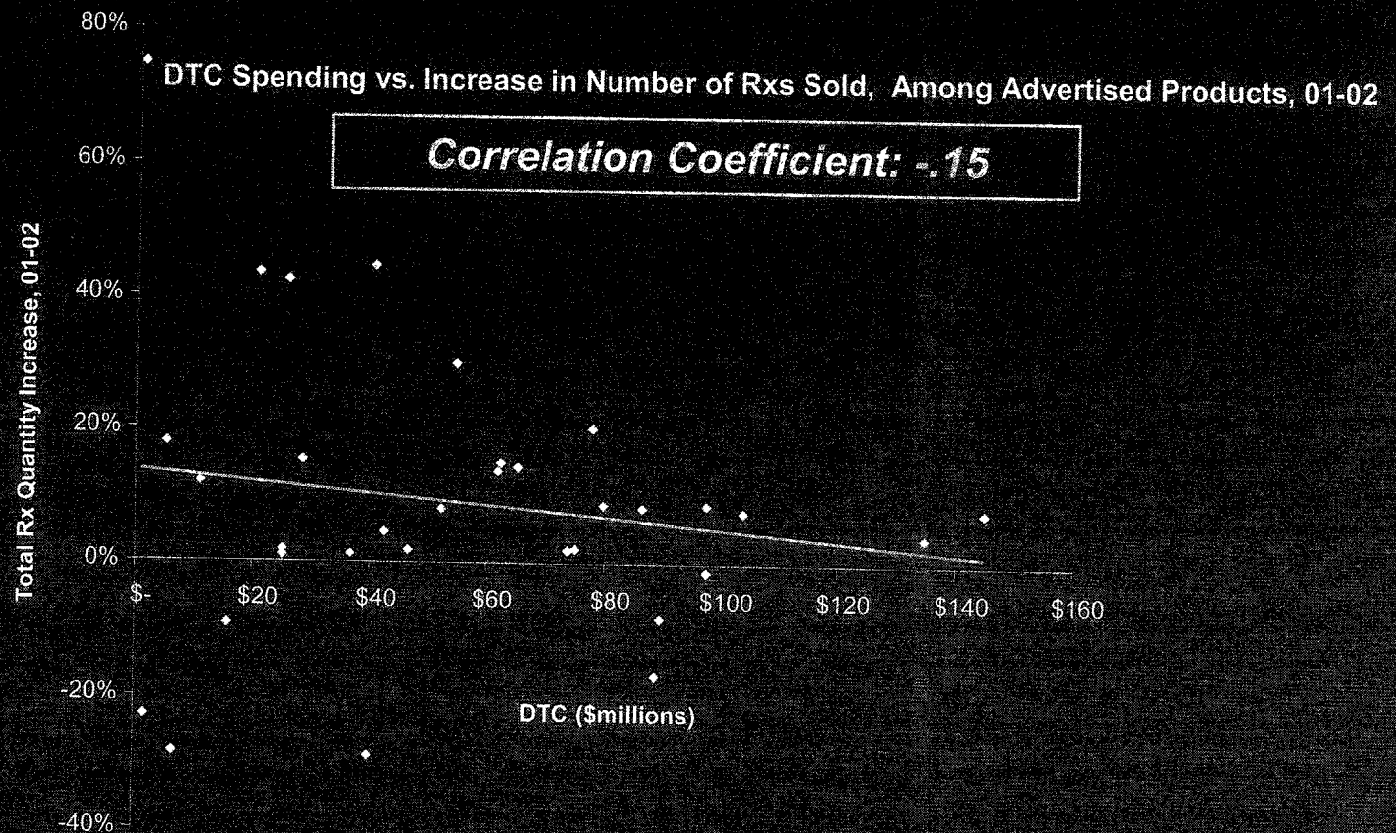
DTC Is Not the Main Driver of Increased Drug Spending

Factors Driving Prescription Drug Spending Increase, 1999–2000



Source: Rosenthal et.al, "Demand Effects of Recent Changes in Prescription Drug Promotion," Kaiser Family Foundation, June 2003

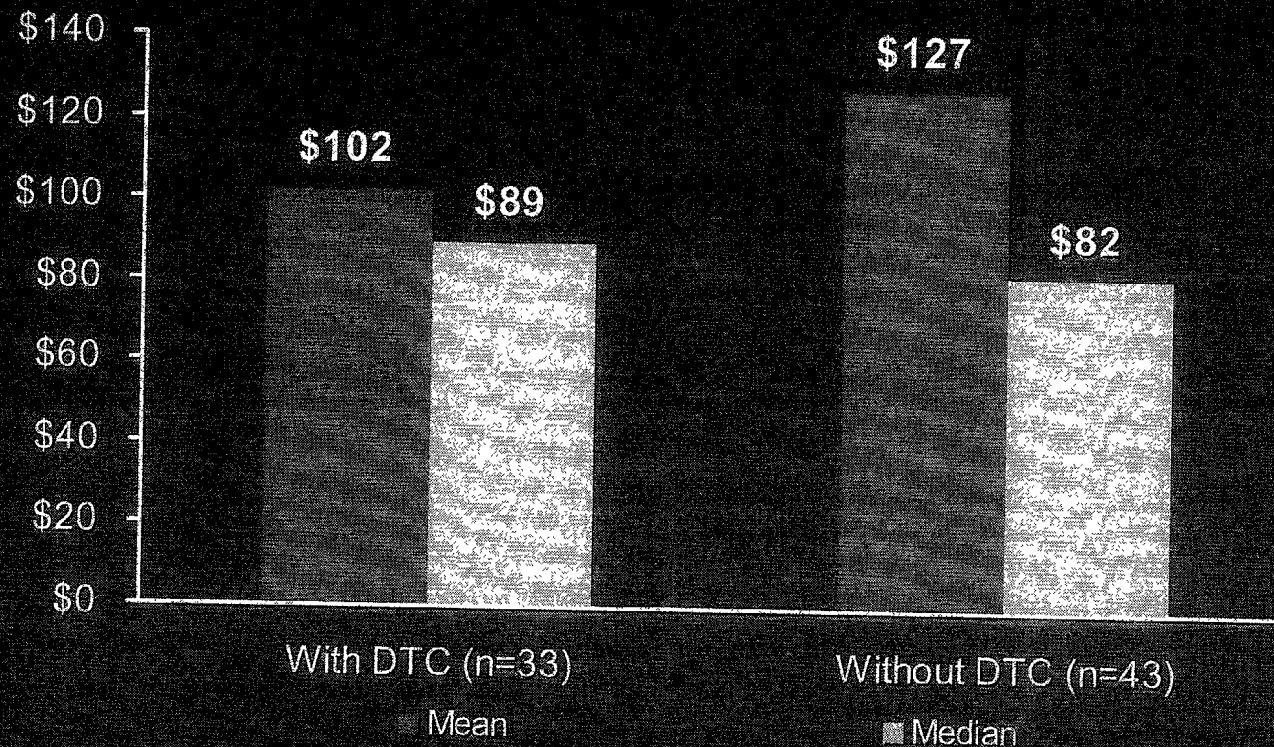
Negative Correlation Between Advertising Levels and Volume Change Suggests DTC Does Not Guarantee Market Success



Source: n=33. Pfizer analysis of sales data from Scott-Levin on prescription drugs with >\$250 million in sales in 2002 that were launched before 2001. Excludes HIV drugs. DTC spending levels from Nielsen Monitor

There is No Predictable Difference in Prices Between Top-Selling Products That Do and Do Not Advertise

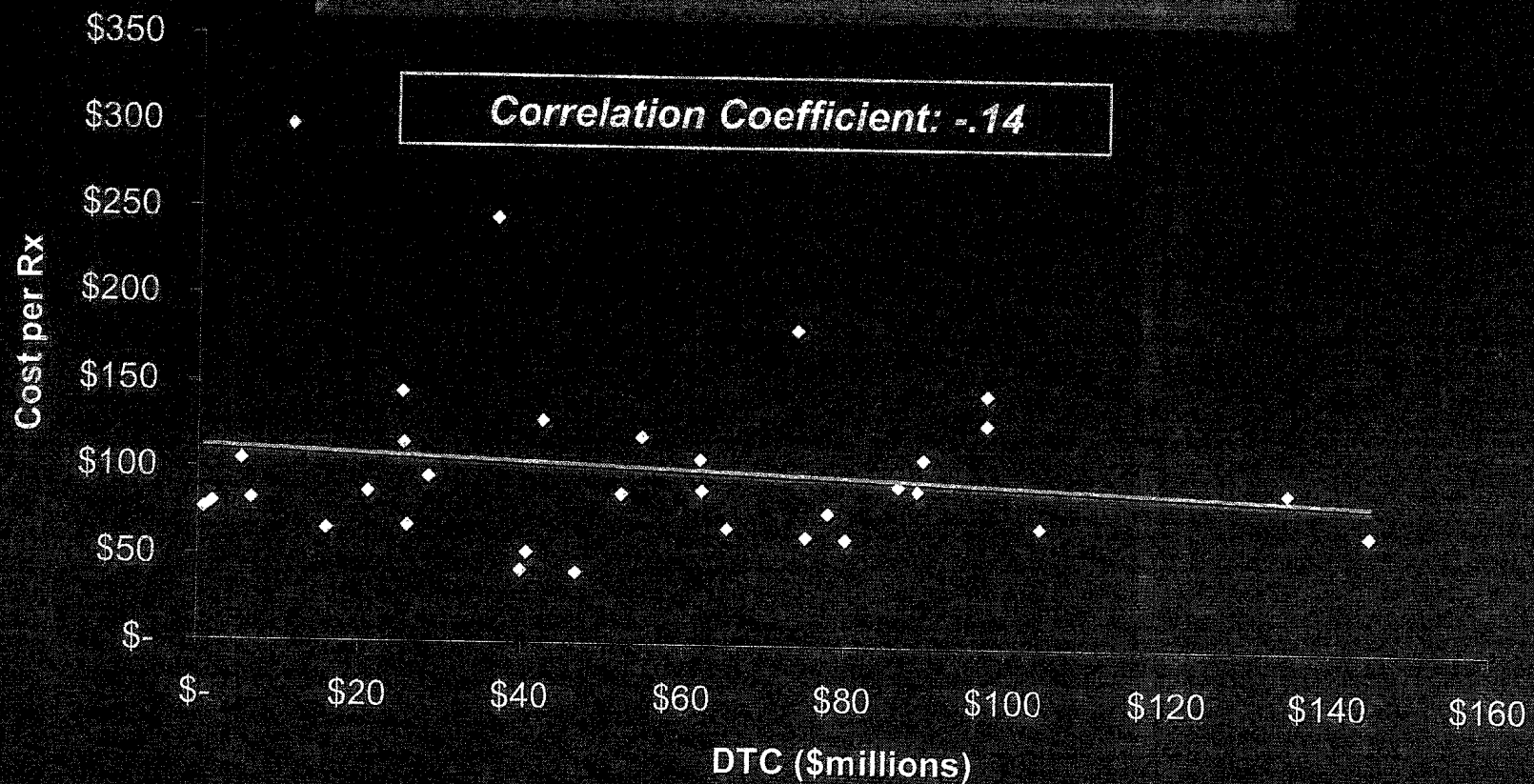
Prices of Top Prescription Products 2002



Source: Pfizer analysis of sales data from Scott-Levin on prescription drugs with >\$250 million in sales in 2002 that were launched before 2001. Excludes HIV drugs. Presence or absence of DTC advertising based on Nielsen Monitor

Among Advertised Products, Correlation Between Advertising Levels and Price Levels Is Somewhat Negative

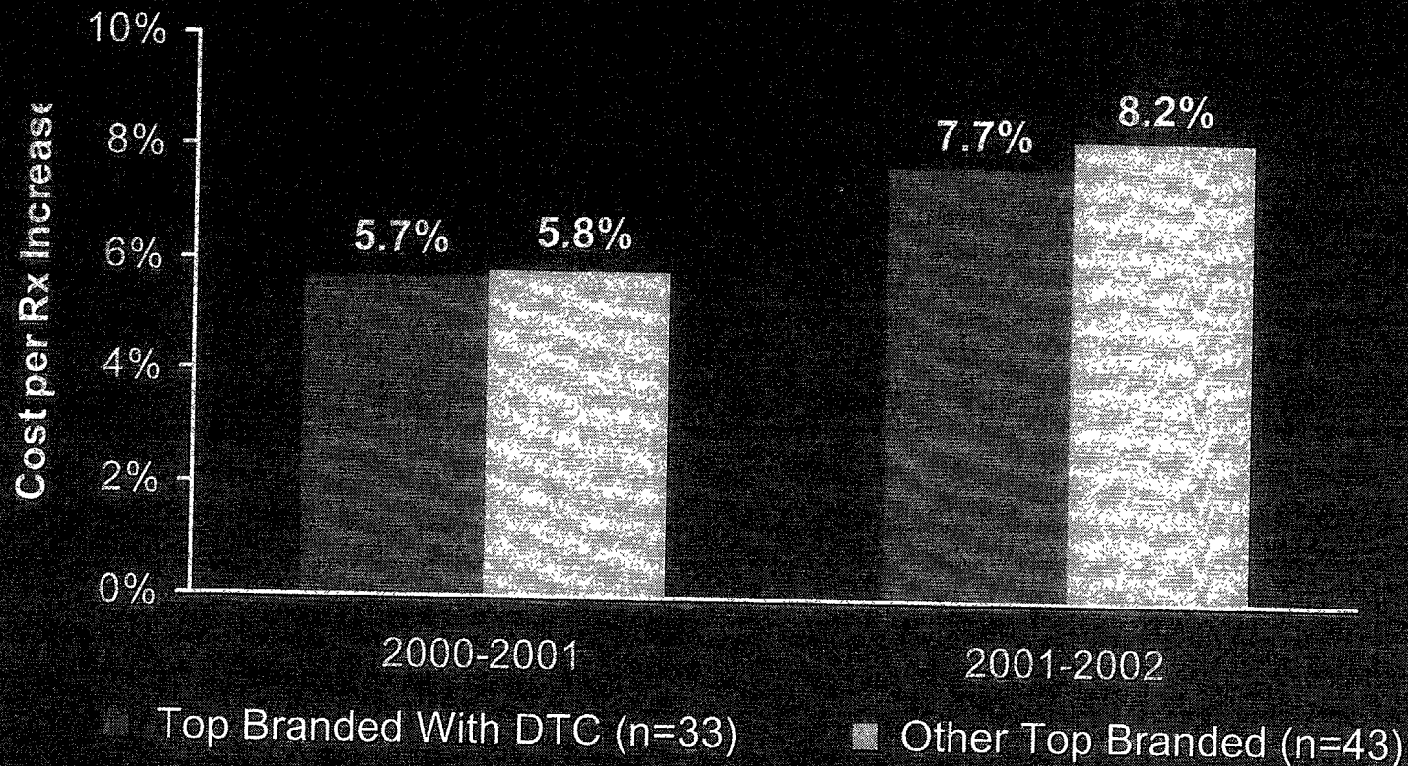
DTC Spending vs. Cost per Rx
2002



Source: n=33. Pfizer analysis of sales data from Scott-Levin on prescription drugs with >\$250 million in sales in 2002 that were launched before 2001. Excludes HIV drugs. DTC spending levels from Nielsen Monitor

Prescription Drug Price Change Does Not Depend on DTC Advertising

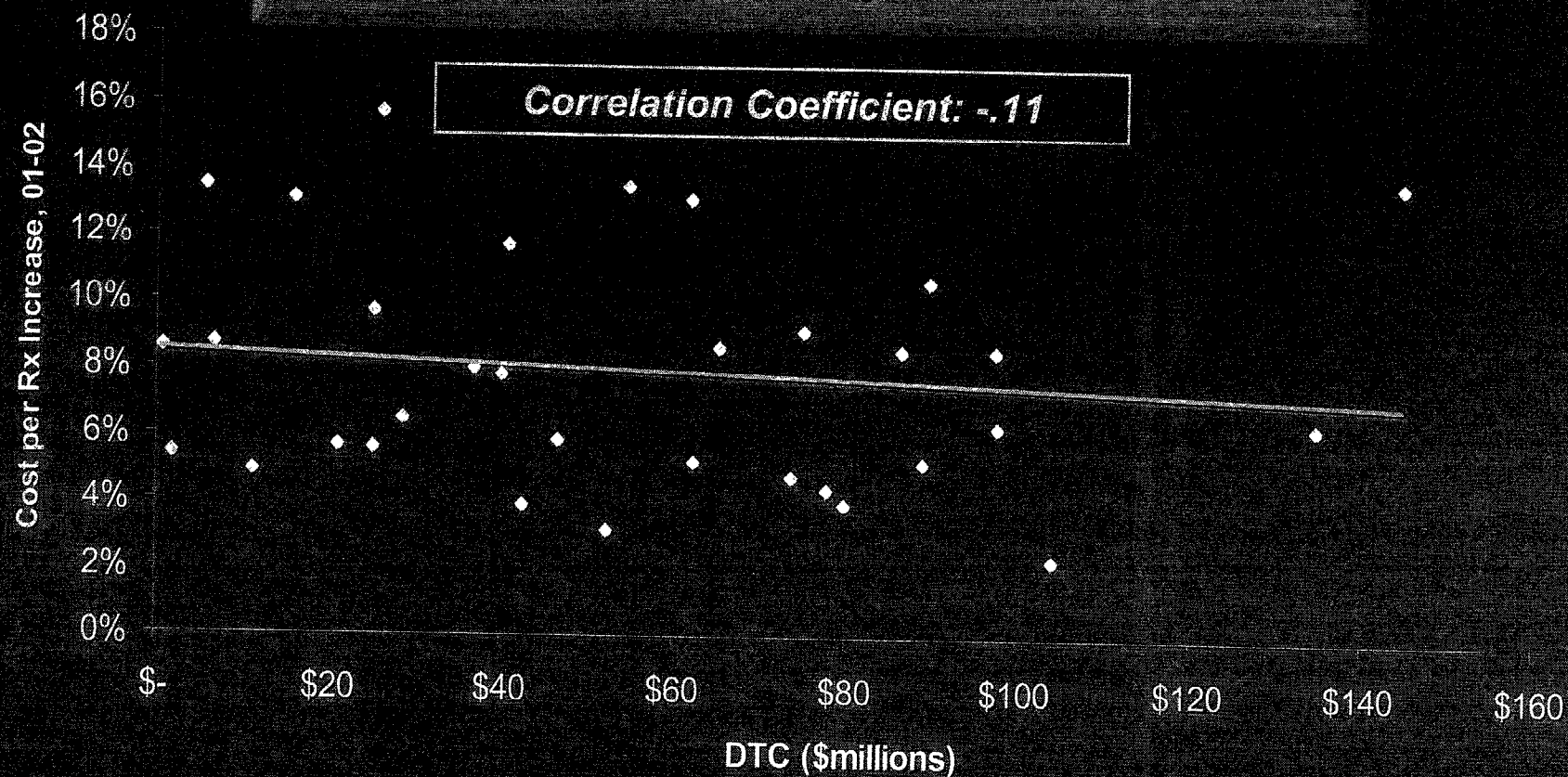
Annual Growth in Cost per Rx
(Weighted by 2002 Quantity)



Source: Pfizer analysis of sales data from Scott-Levin on prescription drugs with > \$250 million in sales in 2002 that were launched before 2001. Excludes HIV drugs; inclusion has no impact on results. Presence or absence of DTC advertising based on Nielsen Monitor. **NOTE: COST GROWTH DOES NOT ACCOUNT FOR CHANGES IN AVERAGE DOSE, MAIL ORDER, or OTHER CHANGES THAT AFFECT NET PRICE PER Rx**

Among Advertised Drugs, Correlation Between Advertising Levels and Price Changes Is Somewhat Negative

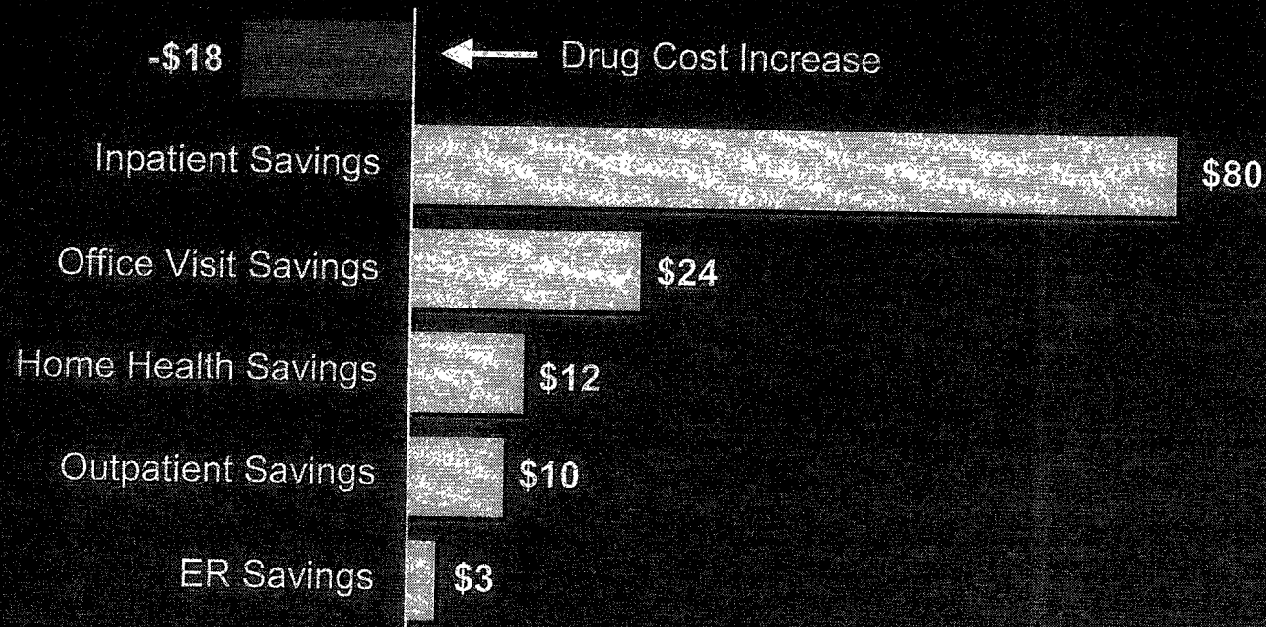
DTC Spending vs. Increase in Cost per Rx
2001-02



Source: n=33. Pfizer analysis of sales data from Scott-Levin on prescription drugs with >\$250 million in sales in 2002 and any DTC that were launched before 2001. Excludes HIV drugs. DTC spending levels from Nielsen Monitor

Increased Utilization of Medicines, Especially Newer Treatments, is a Worthwhile Investment

Illustration of Estimated Savings From Use of Newer Medications
(Assumes Average "Age" of Drug Decreases by About 10 Years)



Net Impact: \$18 Investment Returns \$129 in Savings – Ratio of \$7 Saved for Every \$1 Invested

Source: Professor Frank Lichtenberg, "Benefits and Costs of Newer Drugs: An Update,"
NBER Working Paper 8996, June 2002

In Summary

- ◆ The industry's investment in promotion is significantly less than the investment in R&D and, as a percent of sales, has been flat for years.
- ◆ DTC promotion is only one small contributor to growing pharmaceutical utilization.
- ◆ The use of DTC advertising does not guarantee a medicine's success and certainly is not correlated to higher prices.
- ◆ In fact, DTC driven utilization is appropriate as it reduces the gaps in diagnosis and treatment and helps drive the adoption of newer treatments that result in cost savings.

*Physician-Patient Relationships,
Patient Empowerment
and the Role of Information*

Mike Magee, MD
Vice President, Medical Relations and Science Policy
Pfizer Inc.

Presented at the FDA DTC Public Hearing
September 23, 2003

Evolution of the Patient-Physician Relationship

Today's Patients, More of a Partner Than Ever

Paternalistic  *Participatory*

Study conducted on patient and physician attitudes

**3,500 interviews in the United States, United Kingdom,
Canada, Germany, South Africa and Japan**

Evolution of the Patient-Physician Relationship

Second only to family relationships

Paternalistic  Participatory

- ◆ Patients and physicians committed to joint decision-making
- ◆ Patients research own health conditions
- ◆ Patients today expect physicians to be team leaders and to provide clinical and educational support
- ◆ Physicians are the lead source of information, the most trusted source, and the source most likely to catalyze positive behavior change

Source: Magee, *Relationship-Based Health Care in the US, UK, Canada, Germany, S. Africa, and Japan, 2003*

Patients Want to Be Involved and Empowered

What Does It Mean to Be Empowered?

Patients in All Countries Are More Engaged Than 10 Years Ago but Particularly in the U.S...

- ◆ Ask more questions – 91% agree
- ◆ Make more choices and actively evaluate benefit and risk – 87% agree
- ◆ Take better care of own health – 90%
- ◆ Relationship with their physician is extremely, very important – 78% (second to family relationships)

Source: Magee, *Relationship-Based Health Care in the US, UK, Canada, Germany, S. Africa, and Japan, 2003*

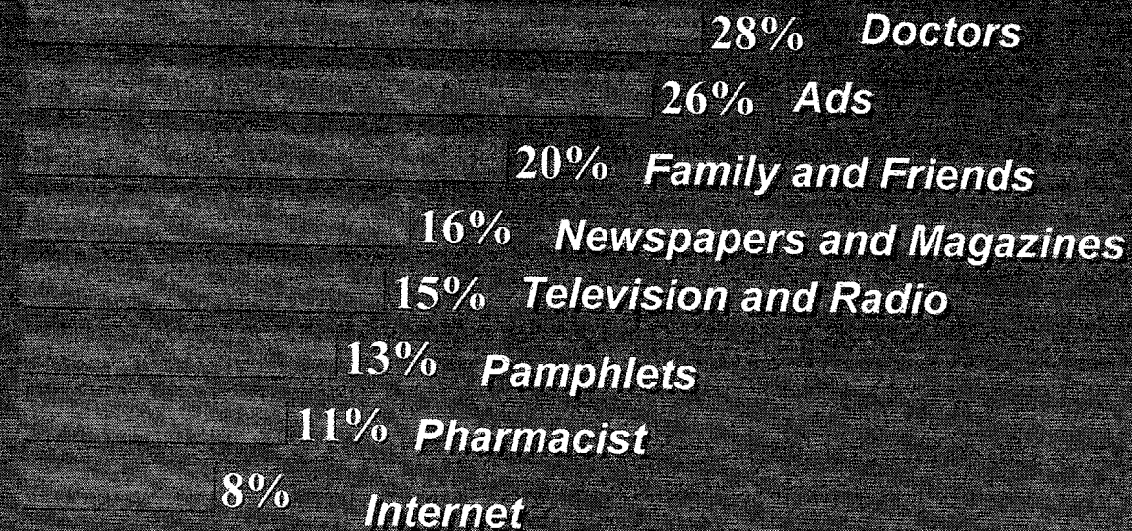
Information is Key to Patient Empowerment

- ◆ 80% of adults feel they need to be more active in managing their own healthcare¹
- ◆ 50% actively seek information from sources other than their physicians²
- ◆ 55% of all adults say they, or their family need more information about at least one health condition³
- ◆ 96.7 million consumers are going on line, and 65% seek health information⁴

Sources: 1. Yankelovich Monitor, 2002; 2. Harris, Interactive, 2002; 3. Pfizer, data on file, 2002; 4. Manhattan Research, 2002

DTC Advertising is a Major Source of Valuable Information

Sources of health care information adults use "often"



Source: Harvard Harris, 2002

DTC Advertising Has Positive Effects in a Number of Ways

- ◆ Helps create a new language of medicine
- ◆ Provides a new understanding of disease and causality
- ◆ Motivates patients to see their physician
- ◆ Primes patients to ask better more informed questions
- ◆ Aids physicians in individualizing care
- ◆ Educates and empowers not only the patient, but family and community simultaneously

DTC Advertising Is Helping Create a New Language of Medicine

- ◆ Disseminates important public health messages¹
- ◆ Helps millions of Americans comprehend medical language²
- ◆ Provides simple, directive messages that help patients understand health disorders and their causes³
- ◆ Brings public health messages to *new* audiences by overcoming barriers of low literacy and cultural differences to raise health awareness⁴

¹Sources: Prevention annual surveys, FDA Patient surveys, FDA Physician survey, Market Measures/Cozint DTC Monitor, NMA, Physician survey, etc.

²Sources: Prevention annual surveys, FDA Patient surveys, Harvard/Harris, GAO "meta-analysis" of available research, NCL

³Sources: Prevention annual surveys, FDA Patient surveys, Harris/Harvard survey, Market Measures/Cozint DTC Monitor

⁴Sources: Commonwealth Fund, March 2002, NMA Physician study, 2002

DTC Advertising Provides a New Understanding of Disease and Causality

- ◆ Encourages patients to discuss sensitive medical issues¹
- ◆ Helps de-stigmatize disease²
- ◆ Encourages compliance with physician prescribed treatment regimens³

¹Sources: Harvard/Harris 2003, Curkendall Eur Urol 2000,

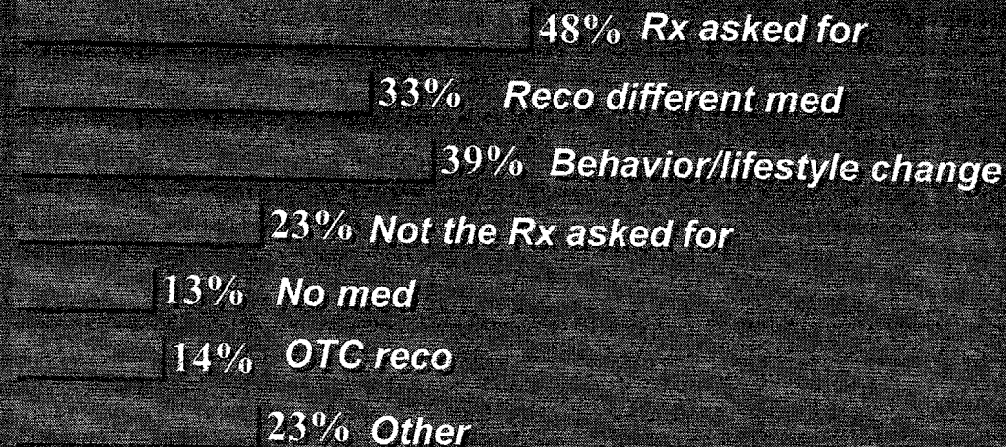
²Source: Kessler, JAMA, June 2003

³Sources: RxRemedy 2001, IPSOS Pharma Trends, *Industry Insights*, 2002

DTC Advertising Motivates Patients to See Their Physician

Well Documented...

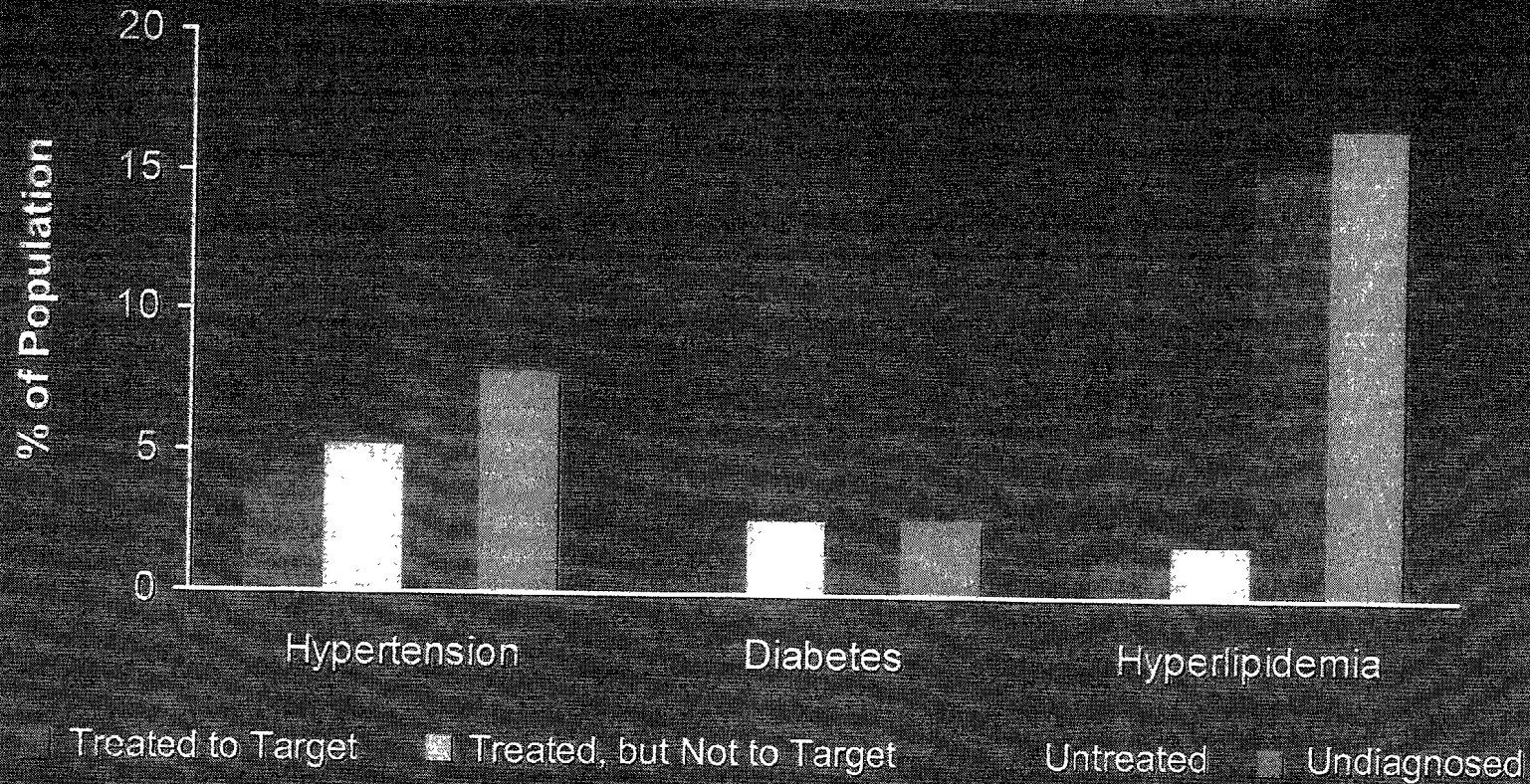
- ◆ Numerous studies from different stakeholders, FDA, Prevention, Harvard/Harris, NCL, etc. ¹
- ◆ Visits result in more things than prescriptions^{2,3}



1. Sources: GAO "meta-analysis" of available research, Prevention annual surveys, FDA Patient surveys, Harris/Harvard survey, National Consumers League 2003, Market Measures/Cozint DTC Monitor
2. FDA, DTC Patient Study, 2002
3. See also Harvard/Harris Interactive, 2003 for physician visit outcomes resulting from a patient request for a brand seen/heard in an ad

Under-diagnosis and Under-treatment Are Enormous Problems Facing the Country

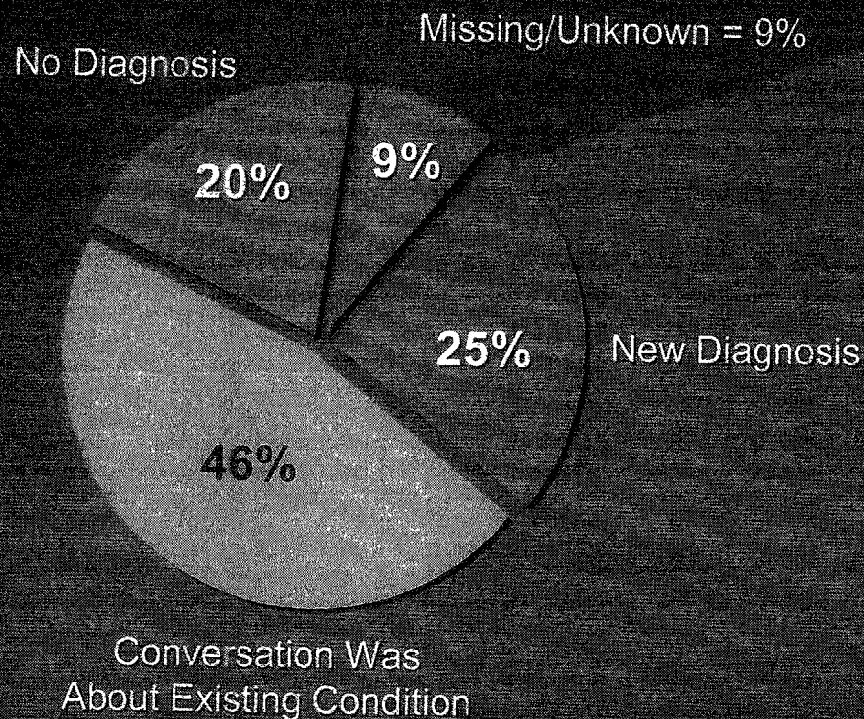
Diagnosis and Treatment Status of Over-18 US Population



Source: Centers for Disease Control, National Health and Nutrition Survey III

Speaking With Physicians Often Leads to New Diagnoses/Co-morbidities

History, Physical Exam, Blood Work²



Diagnoses*

43% of Diagnoses Were "High Priority" Conditions According to AHRQ/IQM Criteria:

- ◆ Diabetes
- ◆ High Cholesterol
- ◆ Hypertension
- ◆ Depression
- ◆ Asthma
- ◆ Arthritis
- ◆ Anxiety

1 Source: Harvard/Harris Interactive Study, 2002

2. Curkendall Eur Urol 2000

DTC Advertising Prepares Patients to Be More Informed

- ◆ Advertisements include details on major risks and provide ways for consumers to gather more information¹
- ◆ Patients are more informed and confident to ask better questions of their physician²
- ◆ Aids physicians in individualizing care³

¹Sources: Prevention annual surveys, FDA Patient surveys, Market Measures/Cozint DTC Monitor

²Sources: FDA Patient surveys, FDA Physician survey, Market Measures/Cozint DTC Monitor

³Sources: Magee, Chapter 6, *Connecting with the New Healthcare Consumer* McGraw-Hill, 2000, Stoeckle *Encounters Between Patients and Doctors: An Anthology*, Lipkin *Patient Education Counseling* 1996, Lipkin *Ann Internal Medicine* 1984

DTC has Broader Societal Benefits

- ◆ Educates and empowers not only the patient, but family and community simultaneously¹

¹Sources: Magee, *Relationship Based Health Care in the United States, United Kingdom, Canada, Germany, South Africa and Japan*, Sept. 2003

In Summary, DTC Strengthens the Physician-Patient Relationship by...

- ◆ Helping patients proactively engage their physician
- ◆ Ensuring patients are informed, empowered and working in true partnership with their physician
- ◆ Keeping patients engaged with their physician over time
- ◆ Expanding communication and individualization of care

*DTC Advertising and
Doctor-Patient Interactions*

Cliff Thumma
Director, Team Leader, Global Market Analytics
Pfizer Inc.

Presented at the FDA DTC Public Hearing
September 23, 2003

Successful Treatment Requires....

Motivation

- ◆ *...To become more informed*
- ◆ *...To seek diagnosis and treatment*

Engagement

- ✓ *Interaction with a healthcare professional*

Commitment

- ◆ *Persistence on therapy*

Motivation

Advertising motivates information seeking, engagement and new diagnoses

- ◆ Patients consistently report that advertising provides them with important information¹
- ◆ Advertising is motivating people to seek additional health information²
- ◆ Health information must be presented in a way that patients can understand³
- ◆ Patients are being motivated to speak to their physicians by information they receive through advertising⁴
- ◆ Advertising-driven conversations are resulting in new diagnoses of important conditions⁵

¹Sources: Prevention annual surveys, FDA Patient surveys, Verispan (Scott/Levin) tracking, Market Measures/Cozint DTC Monitor.

²Sources: Prevention annual surveys, FDA Patient surveys

³Sources: GAO "meta-analysis" of available research, Prevention annual surveys, FDA Patient surveys, Harris/Harvard survey, Market Measures/Cozint DTC Monitor

⁴Source: National Adult Literacy Survey 1993

⁵Sources: Prevention annual surveys, FDA Patient surveys, Harris/Harvard survey

Engagement

Advertising and engagement

- ◆ **Consumer data suggests a greater patient interest in “finding out” than “getting”**

- - National Consumer League Study (2003): 51% “wanted to find out if product was right for them” vs. 9% “wanted to get drug”
 - FDA Patient Study (2002): More often asked “about drug” than “for drug”

- ◆ **Patients consistently report positive interactions with their physicians**

...But what is the physician perspective?

Market Measures DTC Dialogue Study

- ◆ Understand the impact of advertising on actual doctor-patient interactions in the High Cholesterol and Mood/Anxiety Disorder categories.
 - Address interactions where patients initiate conversations about prescription drugs
 - Focus on the interaction first, and advertising second
 - Ask doctors to report on specific experiences and how DTC impacted them, rather than on general attitudes
 - Similar in objective to a portion of FDA's physician survey ("*last interaction where a patient mentioned an ad*")

Methodology: MMC DTC Dialogue

- ◆ **Fifteen-minute interviews conducted among a total of 417 physicians recruited from the Market Measures/Cozint (MMC) physician network**
 - 212 interactions about High Cholesterol
 - 205 physician interactions about Mood/Anxiety Disorder

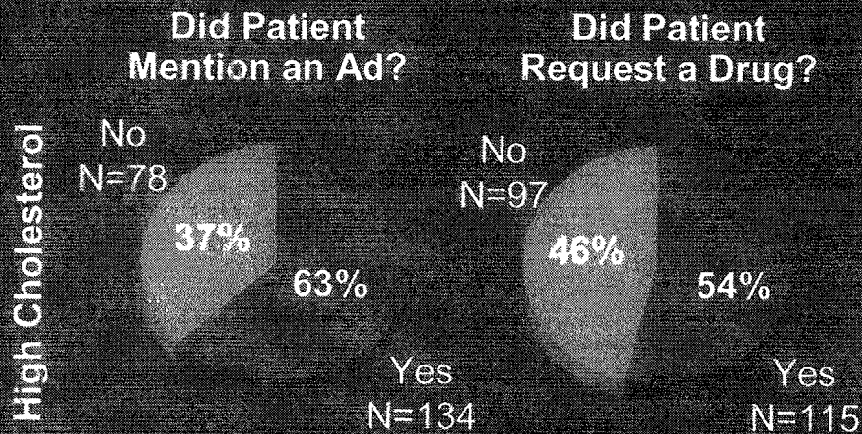
- ◆ **Research Process**
 - Physician randomly recruited from panel to participate in research
 - Physician experiences a patient-initiated discussion about an advertised brand in the relevant category
 - Physician calls a 1-800 number to complete an interview about that specific interaction. Only one call per physician

MMC DTC Dialogue Methodology: Sample Sizes

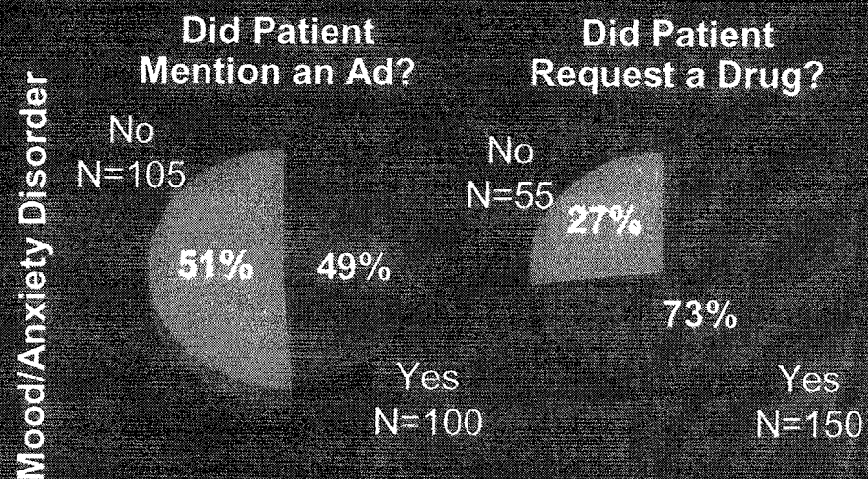
417 Doctor-Patient
Interactions

Total Patients Initiating a Discussion
About an Rx Cholesterol Drug
(212 Physician Responses)

Total Patients Initiating a Discussion
About an Rx Mood/Anxiety Disorder Drug
(205 Physician Responses)



106 primary care physicians
106 cardiologists



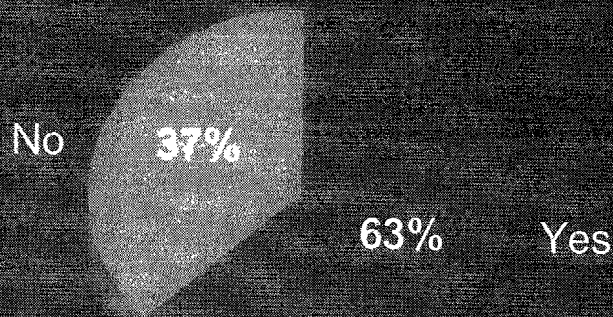
104 primary care physicians
101 psychiatrists

Many--but not all--patient initiated discussions about drugs include a reference to advertising

High Cholesterol

Patients Initiating a Discussion About an Rx Cholesterol Drug (N=212)

Did Patient Mention an Ad?

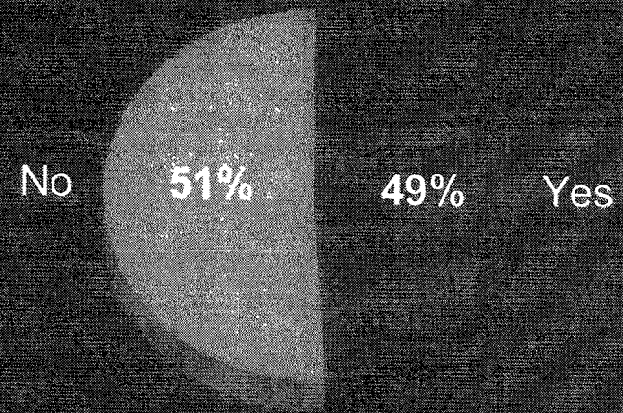


Ref: Page C1

Mood/Anxiety Disorder

Patients Initiating a Discussion About an Rx Mood/Anxiety Drug (N=205)

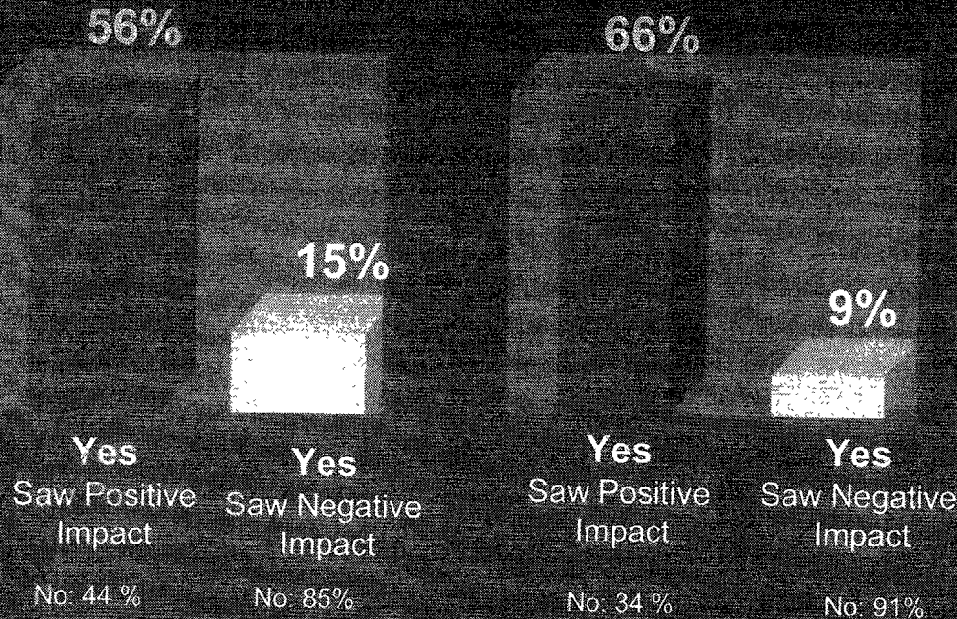
Did Patient Mention an Ad?



Ref: Page MA1

Physicians reported largely positive impact of advertising on their interaction with patients

Did the fact that the patient saw an advertisement...
 ... have a **positive impact** on the interaction?
 ... have a **negative impact** on the interaction?



High Cholesterol

Mood/Anxiety Disorder

Ref: Page C6, C8

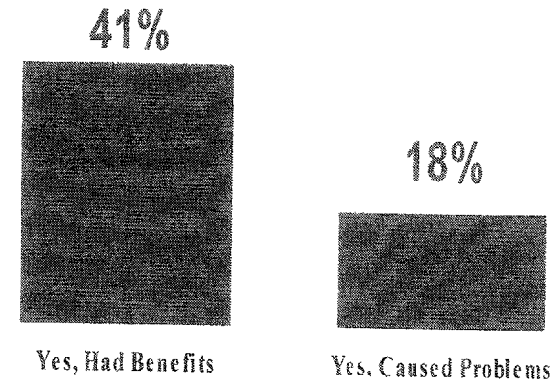
Ref: Page MA6, MA8

FDA Survey of Physicians¹

Did the fact that this patient saw an advertisement...

Have beneficial effects?

Cause an problems?

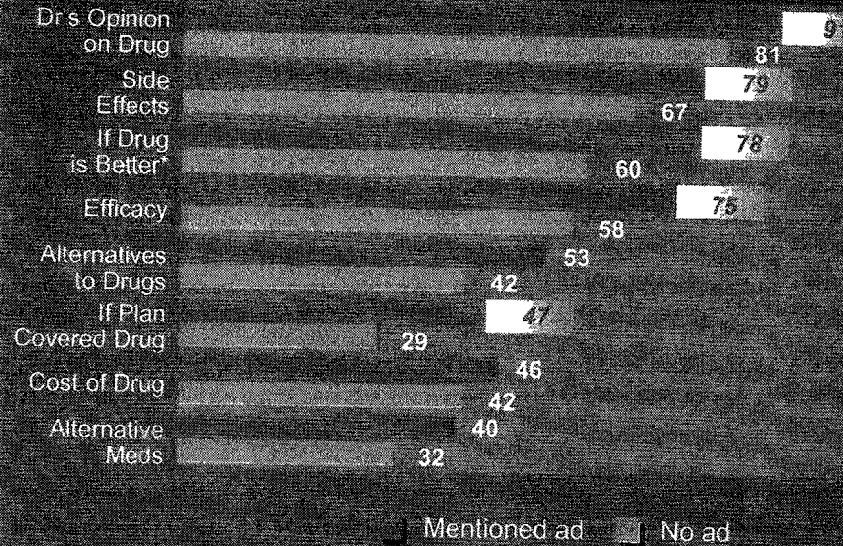


¹FDA Talk Paper. FDA Releases Preliminary Results of Physician Survey on Direct-to-Consumer Rx Drug Advertisements, January 11, 2003.

Physicians reported more thorough discussions with patients who mentioned ads

High Cholesterol

Did Patient Ask About...

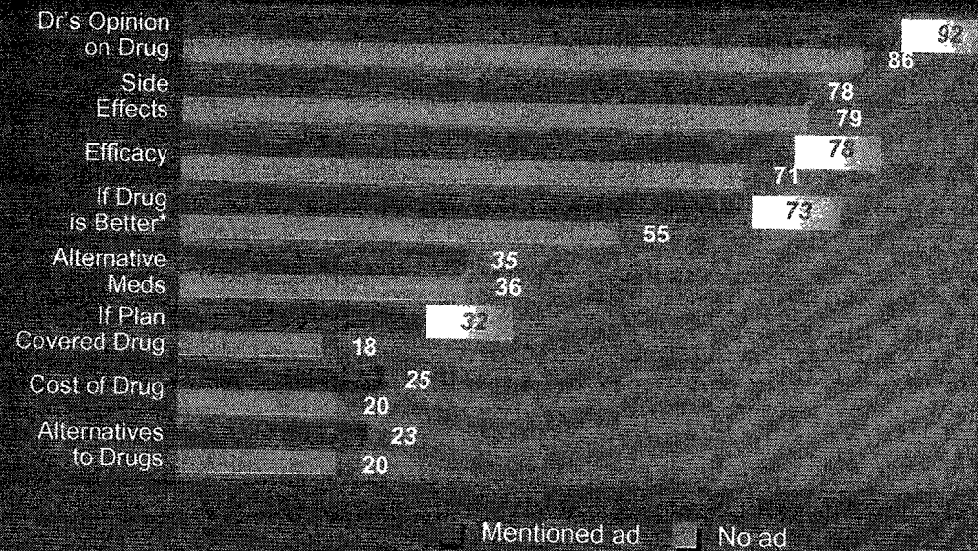


*If drug is better than current drug (among those already on medication for cholesterol)

Significant difference @ 95% confidence level

Mood/Anxiety Disorder

Did Patient Ask About...



*If drug is better than current drug (among those already on medication for mood/anxiety disorder)

Significant difference @ 95% confidence level

Physicians reported that patients asked about products that were appropriate for them and their condition

High Cholesterol

- ◆ **85%¹ of physicians reported that patients inquired about a medicine that was appropriate for them**
- ◆ **72%¹ of physicians found the discussion to be a valuable part of the office visit.**

Mood/Anxiety Disorders

- ◆ **83%¹ of physicians reported that patients inquired about a medicine that was appropriate for them**
- ◆ **76%¹ of physicians found the discussion to be a valuable part of the office visit.**

FDA Survey of Physicians²

- ◆ ***When a patient asked about a drug, 88% of the time they had the condition that the drug treated***
- ◆ ***80% of physicians believed patients understood what condition the drug treats***
- ◆ ***The vast majority (91%) of physicians said patients did not attempt to influence their treatment in a way that would be harmful***

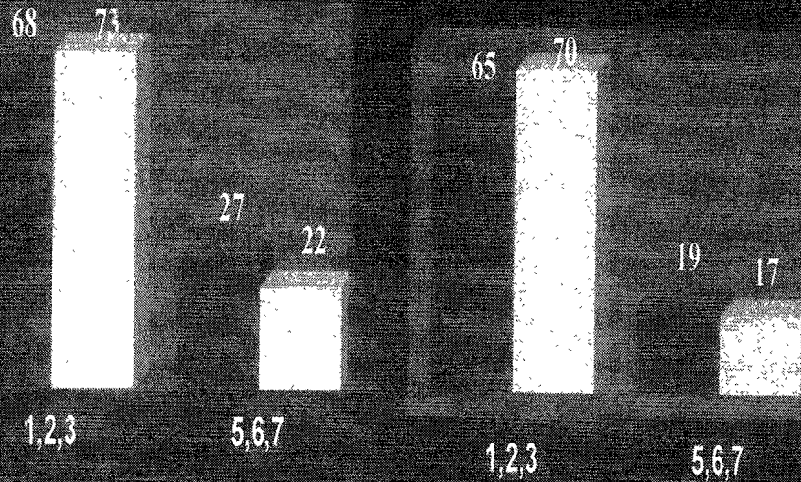
¹Rated 5,6,7 on a 7-point scale. (Ref Page C13,C&. MA13,MA7)

²FDA Talk Paper, FDA Releases Preliminary Results of Physician Survey on Direct-to-Consumer Rx Drug Advertisements, January 12, 2003.

Most physicians reported little pressure to prescribe

How Much Pressure Did You Feel to Grant the Patient Their Request?

1 = "No Pressure"
7 = "A Lot of Pressure"

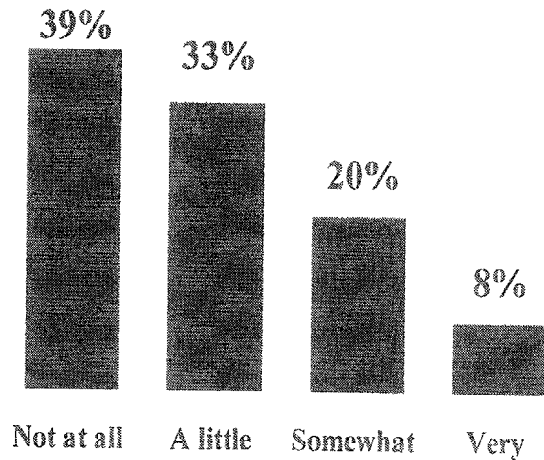


High Cholesterol

Mood/Anxiety Disorder

FDA Survey of Physicians¹

To what extent did you feel pressured to prescribe a drug at this visit?
(When patient requested a specific drug)



¹FDA Talk Paper, FDA Releases Preliminary Results of Physician Survey on Direct-to-Consumer Rx Drug Advertisements, January 14, 2003.

Commitment

Physicians reported a belief that patients who participate in treatment decisions would be more compliant

- ◆ Strong agreement that receiving a requested medicine increased the likelihood that a patient would:
 - Fill the prescription
 - Take the medication as prescribed
 - Tolerate nuisance side effects

- ◆ 2/3 of physicians also believe that patients would be more receptive to diet and lifestyle change

And there is in-market evidence that involvement and reinforcement increases compliance

- ◆ Longitudinal patient studies have shown that patients who request and receive a drug remain on therapy longer¹
- ◆ Other studies have documented higher refill rates among patients who are aware of advertising for “their” product²

¹Pfizer/RxRemedy Compliance Analysis (available at www.pfizer.com)

²Pfizer analysis of Ipsos-PharmTrends longitudinal panel data. See also Ipsos-PharmTrends “*Industry Insights*”, Summer 2002 for a similar publicly available analysis.

Successful Treatment Requires....

Motivation

- ◆ *...To become more informed*
- ◆ *...To seek diagnosis and treatment*

Engagement

- ◆ *Interaction with a healthcare professional*

Commitment

- ◆ *Persistence on therapy*

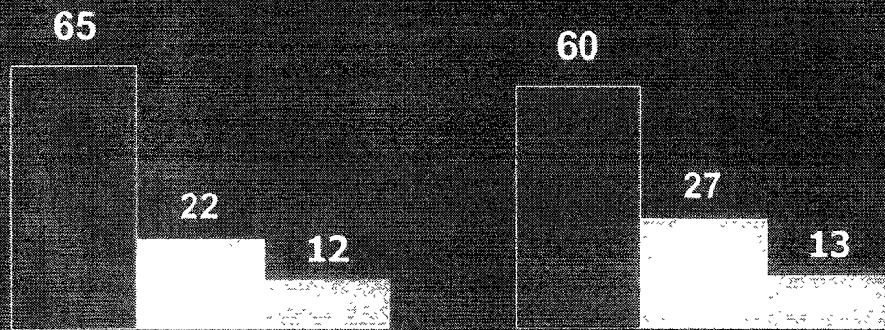
Attachments
(Contextual Data Referenced in Body of
Presentation)

Patients report that advertising provides them with important information

Verispan

Advertising of prescription drugs to the general public¹...

□ Agree ■ Neutral ▒ Disagree



Increases awareness of new treatments

Alerts patients that symptoms may be serious

Market Measures DTC Monitor

Ads provide a valuable service in educating the public (among condition sufferers)²...

Agree 64

Neutral 22

Disagree 9

Ads provides adequate information about the risks of taking medication (among condition sufferers)²...

Agree 56

Neutral 24

Disagree 14

¹ Verispan, DTC Audit, 2nd Quarter 2003

² Market Measures/Cozint DTC Monitor 2001

Advertising is motivating people to seek additional health information

- ◆ 42% of consumers who see a DTC ad search for more information about a condition or treatment due to the ad¹.
- ◆ 20% of consumers who see of a DTC ad (38 million people) consult a web-site, print ad or toll free number as a result of seeing the DTC ad².

Ad Prompted Information Search

<i>About What??</i>		<i>Looking for??²</i>	
Rx they've never taken	39%	Benefits	81%
Rx for someone else	27	Risks	78
Rx they've just started on	17	Indications	75
Rx they've been on for a while	11		

¹ Direct-to-Consumer Advertising of Prescription Drugs, 1999-2002: Preliminary Patient Survey Results. June 18 2002

² Prevention, "5th Annual Survey of Consumer Reaction to Direct-to-Consumer Advertising of Prescription Medications" 2002

Patients are being motivated to speak to their physicians by information they receive through advertising

Prevention Magazine Study

◆ 32% of consumers have talked to their physicians about an advertised medicine because of an ad (61 million people)¹

◆ 13% of consumers have talked to their physicians about a health condition for the first time because of an ad (25 million people)¹

GAO Meta-Analysis

◆ Review of 10 DTC related studies showed an average of 33% of consumers have talked to their physicians about an advertised medicine because of an ad²

Harris/Harvard Study

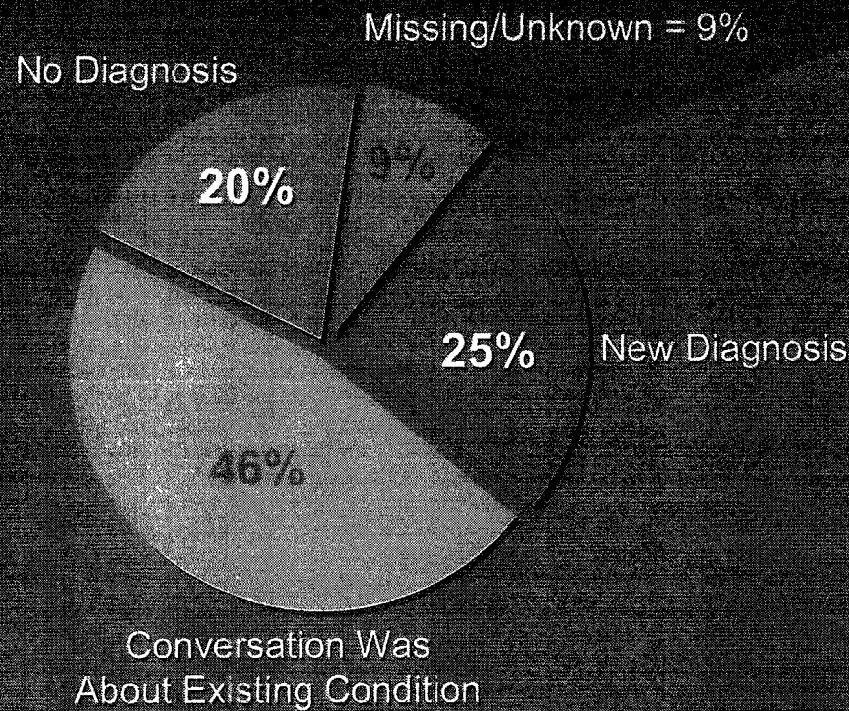
◆ 35% of consumers have talked to their physicians about an advertised medicine because of an ad (66 million people)³

¹ *Prevention*, "5th Annual Survey of Consumer Reaction to Direct-to-Consumer Advertising of Prescription Medications", 2002

² General Accounting Office, "Prescription Drugs: FDA Oversight of Direct-to-Consumer Advertising Has Limitations", 2002

³ Harris/Harvard Study 2003

Advertising-driven conversations are resulting in new diagnoses of important conditions



Diagnoses*

43% of Diagnoses were "High Priority" Conditions According to AHRQ/IQM Criteria:

- Diabetes
- High Cholesterol
- Hypertension
- Depression
- Asthma
- Arthritis
- Anxiety

Consumer data suggests a greater patient interest in “finding out” than “getting”

2003 National Consumers League Survey

Which of the following BEST describes your expectations before talking to your doctor?

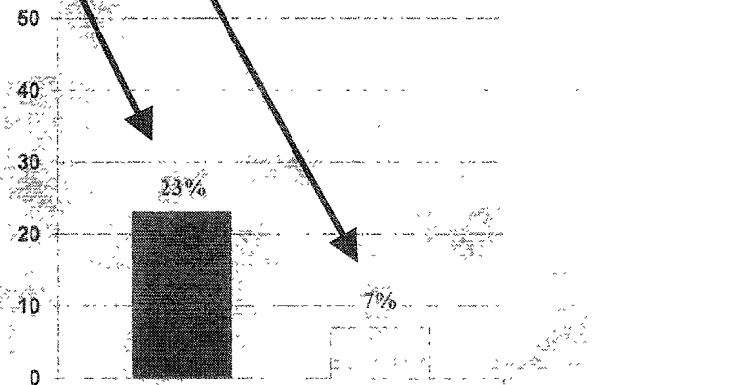
You wanted to find out if the product was right for you **51%**

You wanted to find the best way to treat the condition **34%**

You wanted to get the drug you saw or heard advertised **9%**

2002 FDA Patient Survey

Asking About Treatment Asking About a Specific Brand

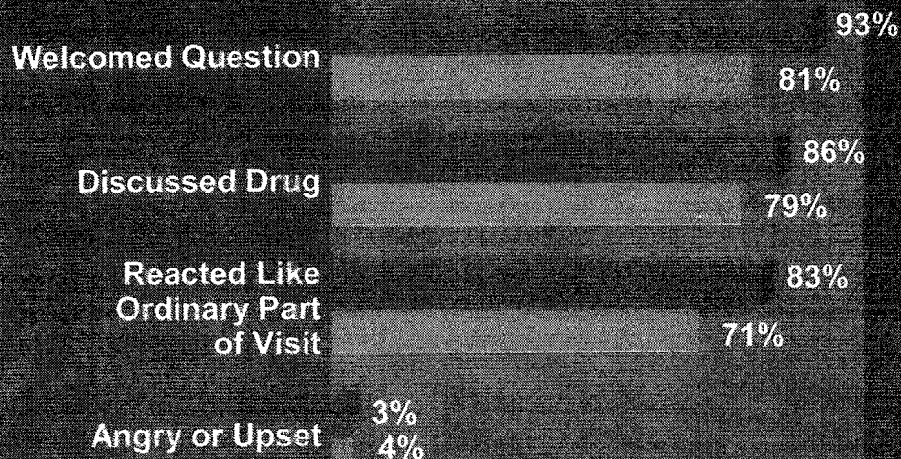


2002 N = 944

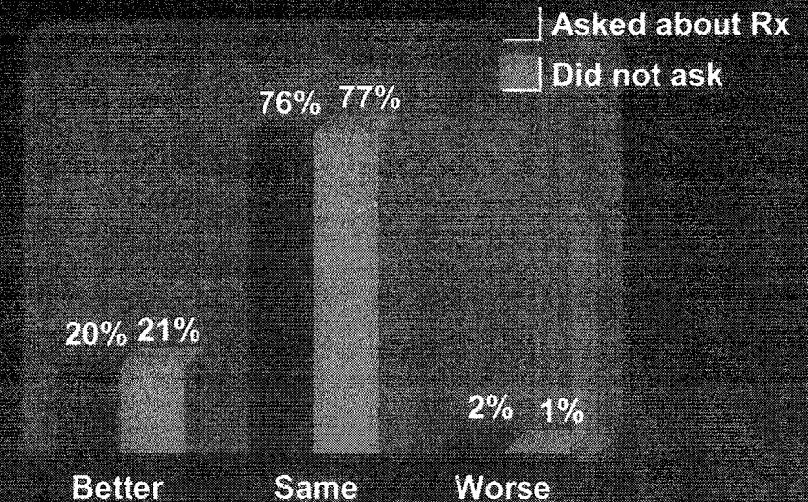
Patients consistently report positive interactions with their physicians

2002 FDA Patient Survey

Which of These Possible Reactions Did Your Doctor Have When You Asked About the Drug?



Relationship With Doctor



As a result of this visit, did your relationship with your doctor get better, get worse, or stay about the same?

1999 N = 220 2002 N = 223

2002 N=944

Patients who request and receive a drug remain on therapy longer

- ◆ Utilized the RxRemedy Information Service proprietary 25,000 patient longitudinal database.
 - Data collected from 1997 - 2000.
- ◆ Analysis conducted at the therapeutic category level across five major advertised conditions.
 - Allergy (N= 2435 patients)
 - Arthritis (N= 2769 patients)
 - Diabetes (N= 1848 patients)
 - Depression (N= 1613 patients)
 - Elevated Cholesterol (N= 4059 patients)
- ◆ Patients categorized into three classes, and persistence tracked.
 - Patient did not ask for Rx; doctor initiated prescription
 - Patient asked without prompting from ad
 - Patient asked with prompting from ad

% of Patients On Therapy After Six Months (6-Month Persistence)

	Patient Requests Over Entire Course of Therapy		
	Doctor Chose (No Requests)	Patient Asked Without Prompting from Ad	Patient Asked With Prompting from Ad
	A	B	C
	%	%	%
Allergy	21	34 A	44 A,B
Arthritis	32	43 A	56 A,B
Elevated Cholesterol	62	71 A	72 A
Depression	43	50 A	59 A,B
Diabetes	68	72 A	75 A

Significance Testing

A = Significant effect vs. "Doctor Chose" @ 95% level

B = Significant effect vs. "Asked Without Prompting by Ad" @ 95% level

Higher refill rates among patients who are aware of advertising for their product

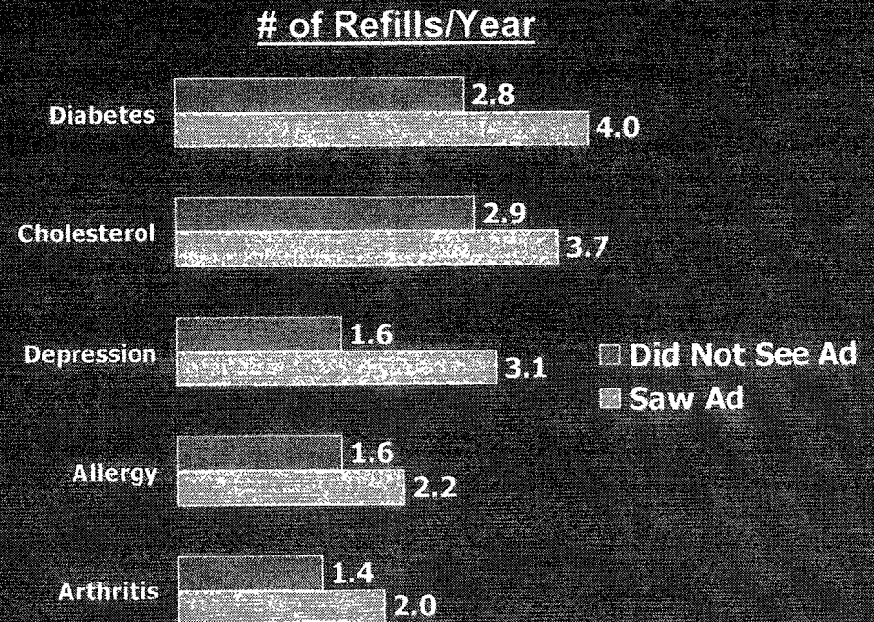
Attitudes

Patients who have seen an ad for an Rx product they are taking

- ◆ 40% say the ad makes them feel better about the benefits
- ◆ 34% say the ad makes them feel better about safety
- ◆ 17% say the ad makes them more likely to take their medicine ¹

Behavior

Patients who have seen an ad for an Rx product they are taking



Prevention, Annual DTC Study, 2001

Pfizer analysis of Ipsos-PharmTrends longitudinal panel data. See also Ipsos-PharmTrends "Industry Insights", Summer 2002 for a similar publicly available analysis. (Category data are weighted averages of brands within therapeutic area)

EXECUTIVE SUMMARY

DTC DOCTOR DIALOGUE STUDIES: HIGH CHOLESTEROL AND MOOD/ANXIETY DISORDERS

METHODOLOGY

In the DTC High Cholesterol Doctor Dialogue, fifteen-minute interviews were completed with 212 physicians: 106 primary care physicians and 106 cardiologists. In the Mood/Anxiety Doctor Dialogue, 205 physicians completed interviews: 104 primary care physicians and 101 psychiatrists.

Doctor dialogue studies are designed to collect information from actual patient-physician interactions. Physicians are instructed to call a 1-800 number to report a patient-initiated discussion that just took place in their office. Physicians are queried in detail on the content and outcome of these discussions. The dynamics of these interactions are also assessed, including the impact of patient behavior (i.e., inquiries, requests) on physician decisions and on the quality of the visit.

One key advantage to the Doctor Dialogue methodology is that insight and understanding of key issues are based on naturally occurring patient-physician encounters rather than on general attitudes and perceptions. Another advantage to this design is that detailed information about the visit is gathered soon after the visit occurs, thus maximizing the accuracy of physician recall.

CONCLUSION

DTC advertising for cholesterol-lowering and for mood or anxiety disorders products has significant and desirable influences on health-promoting behaviors. DTC advertising promotes doctor visits among appropriate patients. These patients raise pertinent questions about appropriate products. DTC ads inform patients about their condition and increase receptivity to treatment. DTC advertising also helps shape the patient-physician dialogue in valuable ways. It not only prompts patients to initiate discussions about their cholesterol or mood/anxiety conditions, but it often leads to thorough discussions about suitable products.

CONCLUSION (Cont'd)

It is clear from this study that DTC advertising does not detract from patient-physician interactions. Contrary to popular belief, DTC advertising is not burdening physicians with patients who are asking inappropriate questions about their health needs. It is not flooding physicians with inappropriate prescription requests. It is not producing uninformed or misinformed patients, nor is it diminishing the overall value of the patient's visit with their healthcare provider.

In fact, a majority of physicians feel DTC advertising enhances the quality of the visit: physicians are 4-7 times more likely to experience DTC advertising as beneficial to the physician-patient interaction than as harmful to the interaction. Further, physicians are 6-8 times more likely to feel that a patient's discussion of a DTC product ad is a valuable part of the office visit than it is an insignificant part of the visit.

KEY FINDINGS*

Physicians Believe that Patients' Awareness of DTC Ads Has a Major Beneficial Effect on Office Visits

High Cholesterol

- Nearly three-quarters (72%) of physicians find that discussions initiated by their patients about cholesterol-lowering medications are a valuable part of the office visit. These discussions are just as valuable to the visits when patients reference DTC ads (68%).
- Over half (56%) of physicians feel that DTC advertising has a beneficial effect on visits, 61% of whom say this beneficial effect has a *major* impact on the patient-physician interaction. Only 15% of physicians feel DTC ads have a negative effect on visits.
- According to physicians, DTC ads inform and educate patients, encourage patients to contact their doctors for needed treatment and increase patients' receptivity to discussing and trying medication.

* Unless noted, all group differences are statistically significant at $p < .10$.

KEY FINDINGS* (Cont'd)

Mood/Anxiety Disorders

- Three-quarters of physicians believe that discussions initiated by their patients about medications for mood or anxiety disorders are valuable to the visit. These discussions are of equal value to physicians whether patients mention DTC ads or not (76% vs. 75%, not statistically different).
- Two-thirds of physicians feel that DTC ads are beneficial to the visit, of whom 70% feel this effect has a major impact on the patient-physician interaction. Only 9% believe DTC ads have a negative effect on their visits.
- Similar to the findings from the High Cholesterol Doctor Dialogue, physicians explain how DTC ads for mood or anxiety disorders medications benefit consumers: they increase consumer knowledge of their conditions and available treatments, encourage consumers to seek medical advice and lead to greater patient receptivity to treatment.

DTC Advertising Drives Undiagnosed and Untreated Patients to Doctors' Offices

High Cholesterol

- Among patients who inquire about cholesterol-lowering medications, those who mention seeing DTC ads are twice as likely (16% vs. 8%) as those who do not mention ads to be previously undiagnosed at the time of their visit.
- Patients who mention DTC ads are also more likely to be previously untreated for their cholesterol condition (57%) compared to those who do not mention ads (41%).

Mood/Anxiety Disorders

- Among patients who inquire about medications for mood or anxiety disorders, those who mention DTC ads are directionally more likely to be previously undiagnosed than those who do not mention DTC ads (35% vs. 30%, respectively; not statistically different).
- However, patients who mention DTC ads are directionally (but not statistically) *less* likely to be previously untreated (43%) compared to those who do not mention DTC ads (48%).

* Unless noted, all group differences are statistically significant at $p < .10$.

KEY FINDINGS* (Cont'd)

DTC Ads Prompt More Thorough Discussions About Appropriate Products

High Cholesterol

- Over half (54%) of physicians believe that DTC ads are influential in motivating patients to discuss their cholesterol conditions.
- DTC ads also influence the breadth of discussions. Patients who mention DTC ads are more likely than those who do not mention ads to ask their doctors about product efficacy, side effects, appropriateness, insurance coverage, and how products compare to their current medications.
- When patients do not ask about product-specific issues, physicians are more likely to cover these topics with patients who mention DTC ads than with patients who do not.

Mood/Anxiety Disorders

- Over half (55%) of physicians report that DTC ads motivate patients to discuss their mood or anxiety conditions.
- Patients who mention medication ads for mood or anxiety disorders are more likely than those who do not mention DTC ads to inquire about how products compare to their current medications and about insurance coverage. Patients who mention DTC ads are directionally more likely than those who do not mention ads to discuss product efficacy and appropriateness (not statistically different).

Requests for Prescriptions Are Frequent and Physicians React Positively to Requests

High Cholesterol

- According to physicians surveyed, when patients inquire about cholesterol-lowering medications, about one-half of these discussions results in patient requests for specific prescriptions. The likelihood that patients will request prescriptions is as high for those who mention DTC ads (54%) as for those who do not (53%).
- Physicians' reactions to patients' requests for prescriptions are overwhelmingly positive (more than eight out of ten). None of the physicians surveyed had negative reactions to patient requests.

* Unless noted, all group differences are statistically significant at $p < .10$.

KEY FINDINGS* (Cont'd)

Mood/Anxiety Disorders

- DTC ads boost patient requests for prescriptions: 79% of patients who mention DTC ads make requests compared to 68% among those who do not mention ads.
- Whether or not DTC ads are mentioned, nine in ten physicians have positive reactions to patient requests for mood or anxiety disorders medications.

Most Requests Are Granted and Physicians Do Not Feel Pressured to Prescribe

High Cholesterol

- When patients inquire about cholesterol-lowering products, at least two-thirds receive prescriptions for the products discussed. Patients are more likely to receive prescriptions if they request them (eight out of ten) than if they do not (five out of ten).
- About seven in ten physicians do *not* feel pressured to grant patients specific prescriptions upon request.
- A slightly larger percentage of patients receive prescriptions when they mention DTC ads compared to when they do not (75% vs. 68%, respectively; not statistically different).

Mood/Anxiety Disorders

- More than three-quarters of patients who inquire about medications for mood or anxiety disorders receive prescriptions. Nine in ten patients who request prescriptions receive them.
- Patients are as likely to receive requested prescriptions whether or not they mention DTC ads.
- Similar to high cholesterol study findings, two-thirds of physicians do not feel pressured to grant patients prescriptions upon request.

* Unless noted, all group differences are statistically significant at $p < .10$.

Market Measures Interactive

DTC Cholesterol Doctor Dialogue

**Prepared For:
Pfizer, Inc.**

Fielded: July 2001

Methodology

The purpose of this study was to provide, from the doctor's perspective, a comprehensive assessment of doctor-patient discussions pertaining to the treatment of high cholesterol. Specifically, this study examined the role of DTC advertising in driving patients to doctors' offices, in shaping the dialogue between doctors and patients, and in shaping the overall quality of these visits.

Fifteen-minute interviews were completed with 212 doctors: 106 primary care physicians (PCPs) and 106 cardiologists (Cards). Doctors were selected from Market Measures Interactive's Medical Marketing Conference, a survey resource consisting of more than 20,000 members representing 25 private-practice physicians and other health care specialties. Doctors were recruited by mail and each was instructed to call a 1-800 number to complete an Interactive Voice Response (IVR) interview, immediately after having a patient-initiated discussion about Lipitor, Pravachol or Zocor. Doctors received honoraria for their participation.

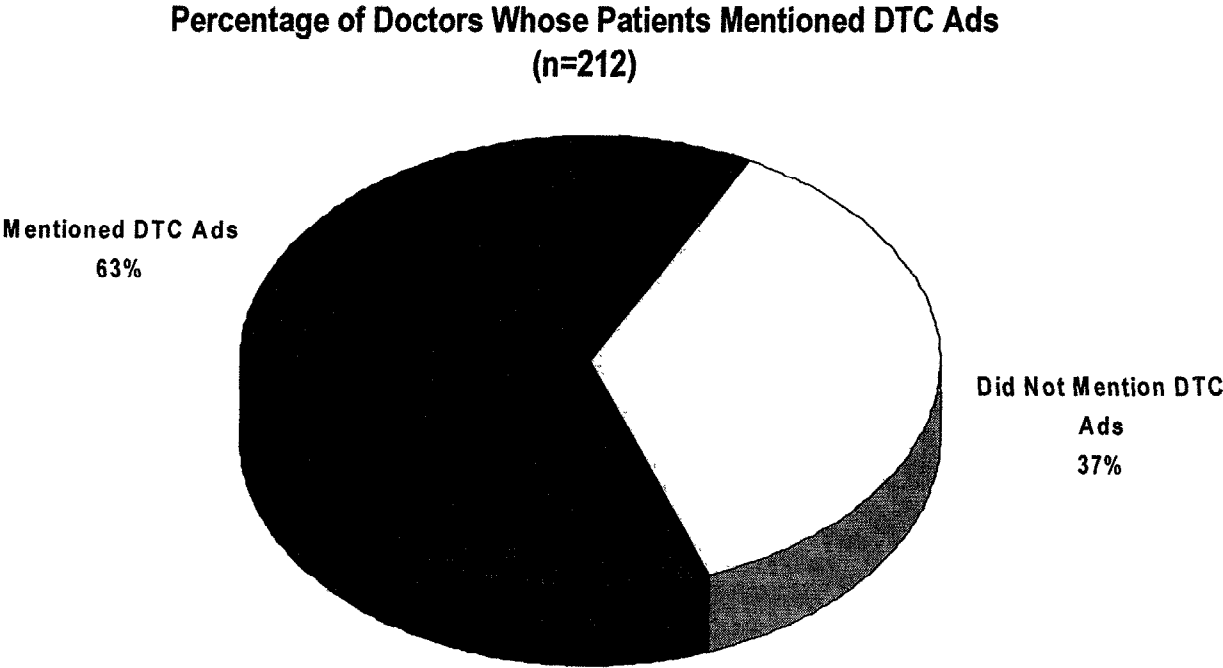
The field period for the study began on June 28 and closed on August 1.

Unless noted, all findings reported are statistically significant at $p < .10$. In tables, statistically significant findings are noted using column letters as superscripts.

I. Role of DTC Ads in Bringing Patients into the Doctor's Office

Patients Seeking Treatment for High Cholesterol Are Mentioning DTC Ads

Doctors reported that of the patients who initiated brand-specific discussions about cholesterol-lowering medications, 63% mentioned DTC ads.



Base: Total doctors

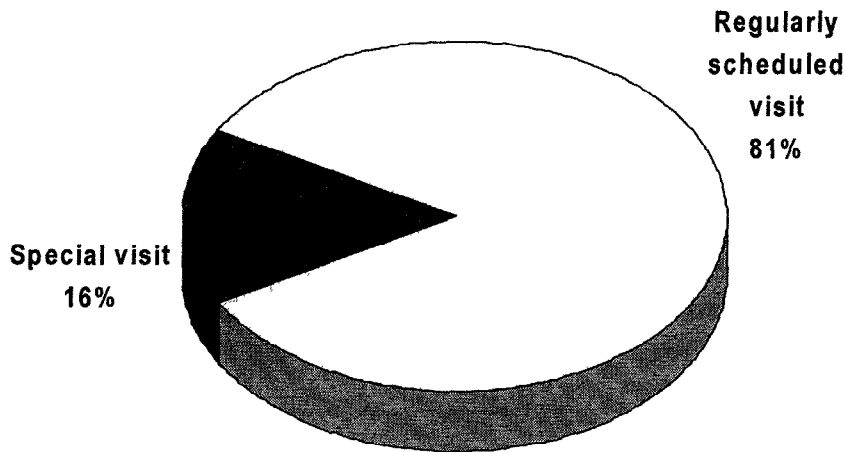
Q.27.00. Did this patient mention seeing or hearing any DTC advertisements for Lipitor/Pravachol/Zocor, that is, an ad on television, in a consumer magazine or newspaper, or in a brochure in a pharmacy or doctor's office?

In General, Patients Are Not Making Special Visits to Discuss DTC Ads

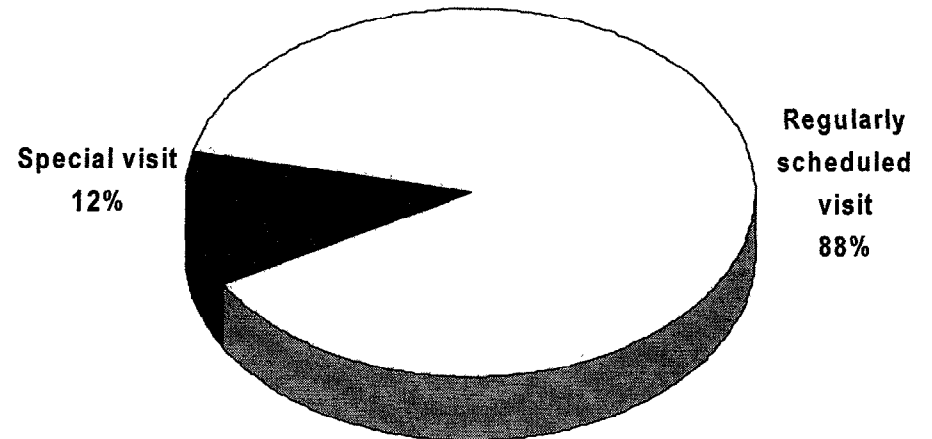
Most discussions about DTC ads are taking place during regularly scheduled visits. However, a slightly larger proportion of the patients who mentioned DTC ads than those who did not mention ads made special visits to see their doctors (16% vs. 12%, respectively; not statistically different).

Percentage of Patients Who Made Special Visits

Mentioned DTC Ads
(n=134)



Did Not Mention DTC Ads
(n=78)

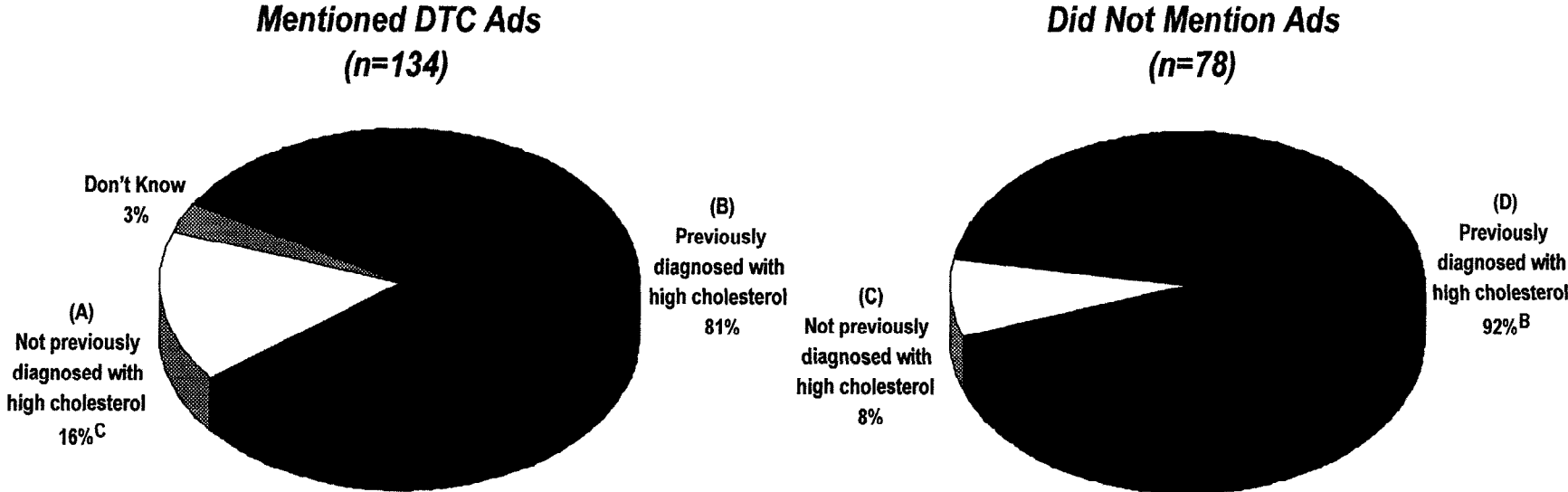


Base: Total doctors
Q.10.00. Was this a regularly scheduled visit for this patient?

DTC Ads Are Bringing the Right Patients to the Doctor's Office -- Undiagnosed Patients

Patients who mentioned DTC ads (16%) were twice as likely than those who did not mention ads (8%) to have been undiagnosed at the time of their visits.

Percentage of Patients Who Had Been Diagnosed with High Cholesterol Prior to Their Visits

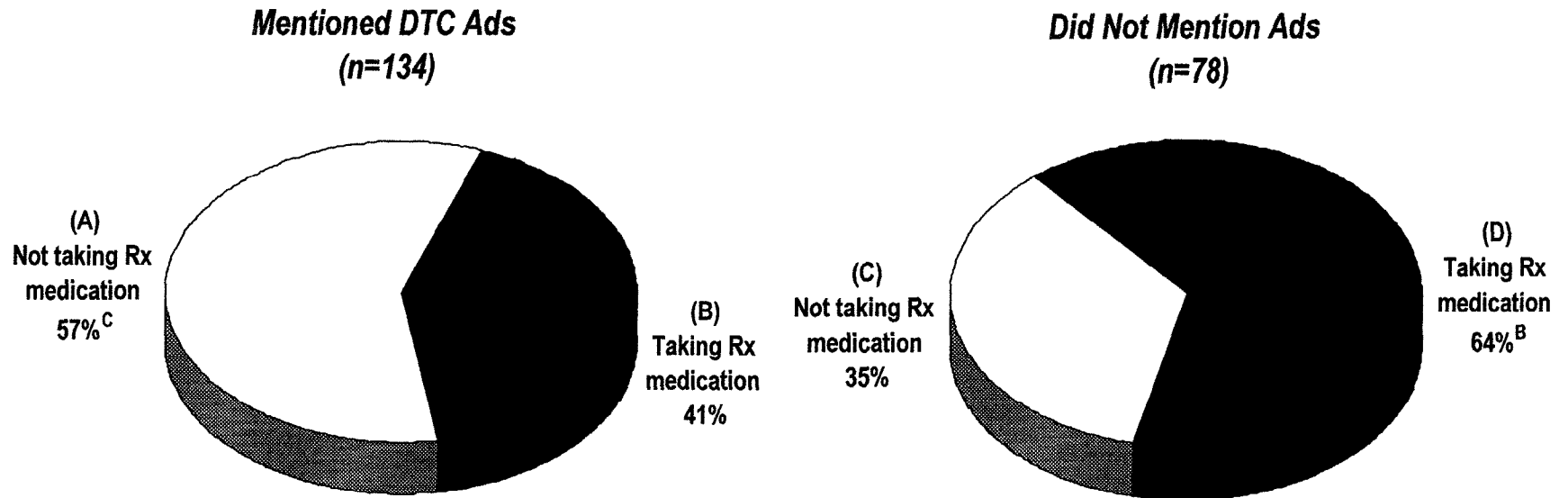


Base: Total doctors
Q.4. Was this patient previously diagnosed with this condition?

DTC Ads Are Bringing the Right Patients to the Doctor's Office -- Untreated Patients

Patients who mentioned DTC ads (57%) were more likely than patients who did not mention ads (35%) to have been previously untreated for high cholesterol at the time of their visits.

Percentage of Patients Who Were Taking Prescription Medication for High Cholesterol Prior to Their Visits



Base: Total doctors

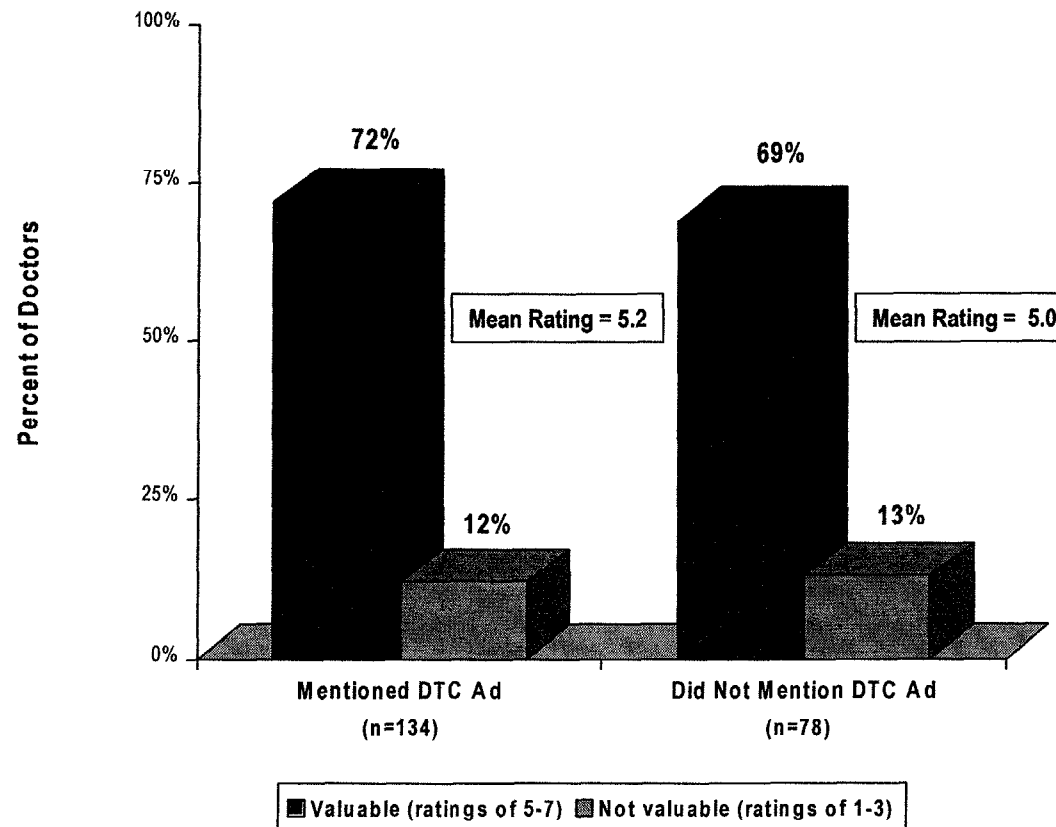
Q.7.00. Prior to this visit, was the patient taking any prescription medication to treat high cholesterol?

II. Impact of DTC Ads on Doctor-Patient Interaction

Discussions About Cholesterol-Lowering Medications Are Valuable

Over two-thirds of doctors found the discussions about cholesterol-lowering medications to be a valuable part of the office visit. A slightly larger proportion of doctors whose patients mentioned DTC ads than those whose patients did not mention ads rated these discussions as valuable (72% vs. 69%; not statistically different).

Doctors' Ratings of the Value of Discussions



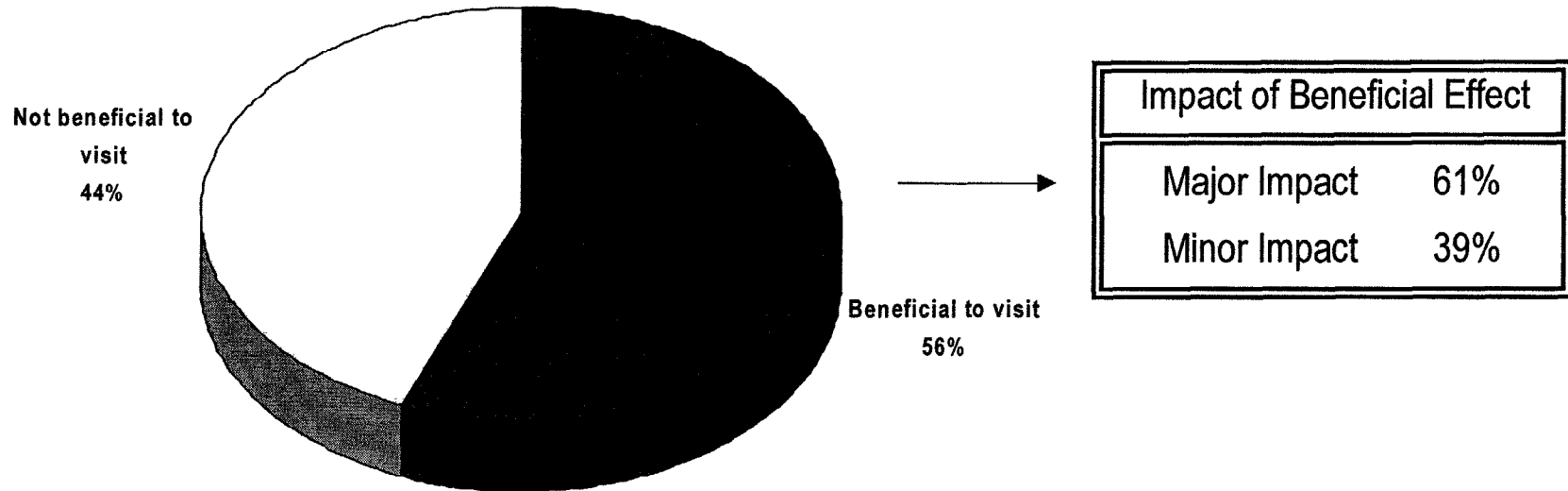
Base: Total doctors

Q.13.00. On a scale of 1 to 7, please rate how valuable you feel the patient's discussion about Lipitor/Pravachol/Zocor was to the visit.

Patients' Awareness of DTC Ads Has Major Beneficial Effect on Office Visits

Over half of doctors (56%) thought that their patients' seeing DTC ads had a beneficial effect on their visits, and 61% of these doctors felt that this beneficial effect had a major impact on the doctor-patient interaction.

**Percentage of Doctors Who Thought That Patients' Seeing DTC Ads Was Beneficial to Their Visits
(n=134)**



Base: Doctors whose patients mentioned DTC ads

Q.27.04. Did the fact that the patient saw a DTC ad have any beneficial effects on your interaction with him/her?

Q.27.05.1 Overall, would you say the beneficial effects had a major or minor impact on your interaction?

DTC Ads Inform Patients, Motivate Patients to Contact Their Doctors, and Increase Patient Receptivity to Treatment

When asked to describe the beneficial effects of patient awareness of DTC ads on the doctor-patient interaction, doctors most frequently mentioned that DTC ads inform and educate patients, motivate patients to contact their doctors for treatment information, and increase patients' receptivity to discussing treatment. (For details, see verbatims in Appendix.)

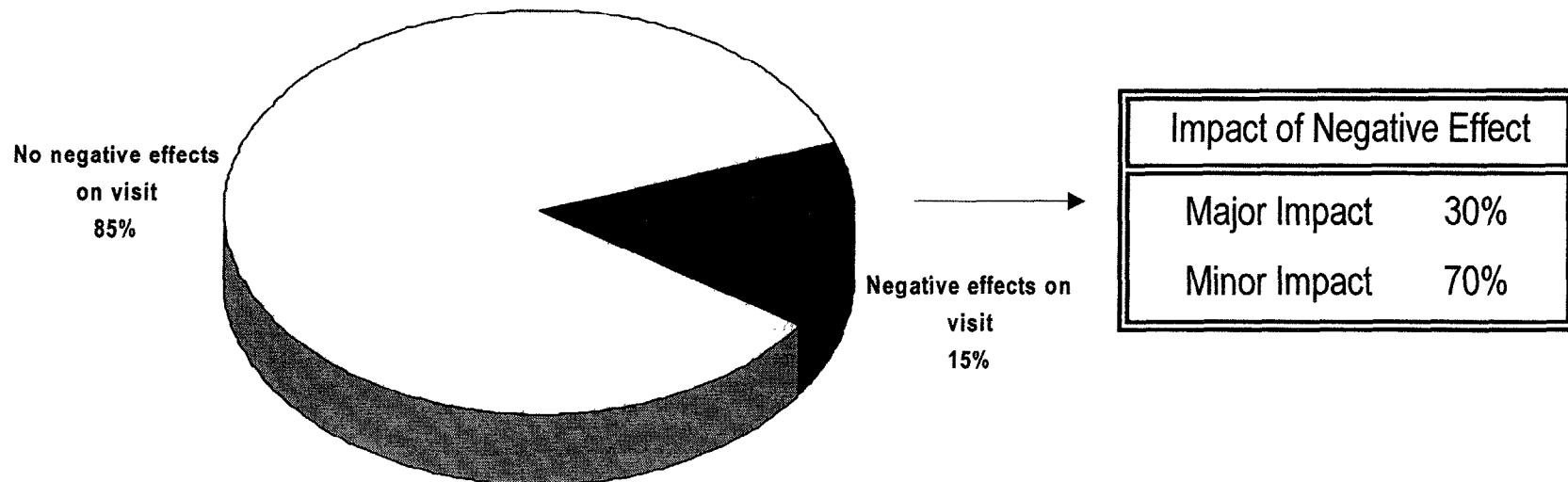
Beneficial Effects of Patient Awareness of DTC Ads on Doctor-Patient Interaction	
-Top Mentions-	
	<u>Total</u>
	<u>%</u>
<u>Ads Informed/Educated/Increased Knowledge of Patients (Net)</u>	<u>40</u>
Ads inform/educate consumers	26
<u>Ads Increased Patient Receptivity to Discussing/Trying Treatment (Net)</u>	<u>30</u>
Patient more receptive to trying medication/easier for doctor to prescribe	25
Easier to discuss product with patient	19
<u>Ads Encouraged/Motivated Patients to Contact Doctor for Treatment Information/Options (Net)</u>	<u>16</u>
Discussions initiated by patients to explore treatment options	11
May increase patient compliance	16
	(n=73)

Base: Doctors who said that their patients' seeing DTC ads had a beneficial effect on the interaction
 Q.27.05. What beneficial effects did the patient's seeing a DTC ad have on your interaction?

Patients' Awareness of DTC Ads Has Minor Negative Effect on Interaction

Only 15% of doctors thought that their patients' seeing DTC ads had a negative effect on their visits, and 70% of these doctors felt that this negative effect had a minor impact on the doctor-patient interaction.

**Percentage of Doctors Who Thought That Patients' Seeing DTC Ads Had a Negative Effect on Their Visits
(n=134)**



Base: Doctors whose patients mentioned DTC ads

Q.27.06. Did the fact that the patient saw a DTC ad have any negative effects on your interaction with him/her?

Q.27.10. Overall, would you say the beneficial effects had a major or minor impact on your interaction?

Patients' Awareness of DTC Ads Has Minor Negative Effect on Interaction (Cont'd)

When asked to describe the negative effects of patient awareness of DTC ads on the doctor-patient interaction, doctors most frequently mentioned that they feel pressured to prescribe products, that patients are not educated enough to understand the ads, and that the ads frighten patients. (For details, see verbatims in Appendix.)

Negative Effects of Patient Awareness of DTC Ads on Doctor-Patient Interaction	
-Top Mentions-	
	<u>Total</u>
	<u>%</u>
Doctor felt pressured to prescribe product/put doctor in awkward position	(5)
Patients are not educated enough to understand ads	(3)
Frightened patients/patients think drugs are unsafe	(3)
Products may be contraindicated/inappropriate for patients	(2)
Doctor does not like DTC advertisements	(2)
	(n=19)*

Base: Doctors who said that their patients' seeing DTC ads had a negative effect on the interaction

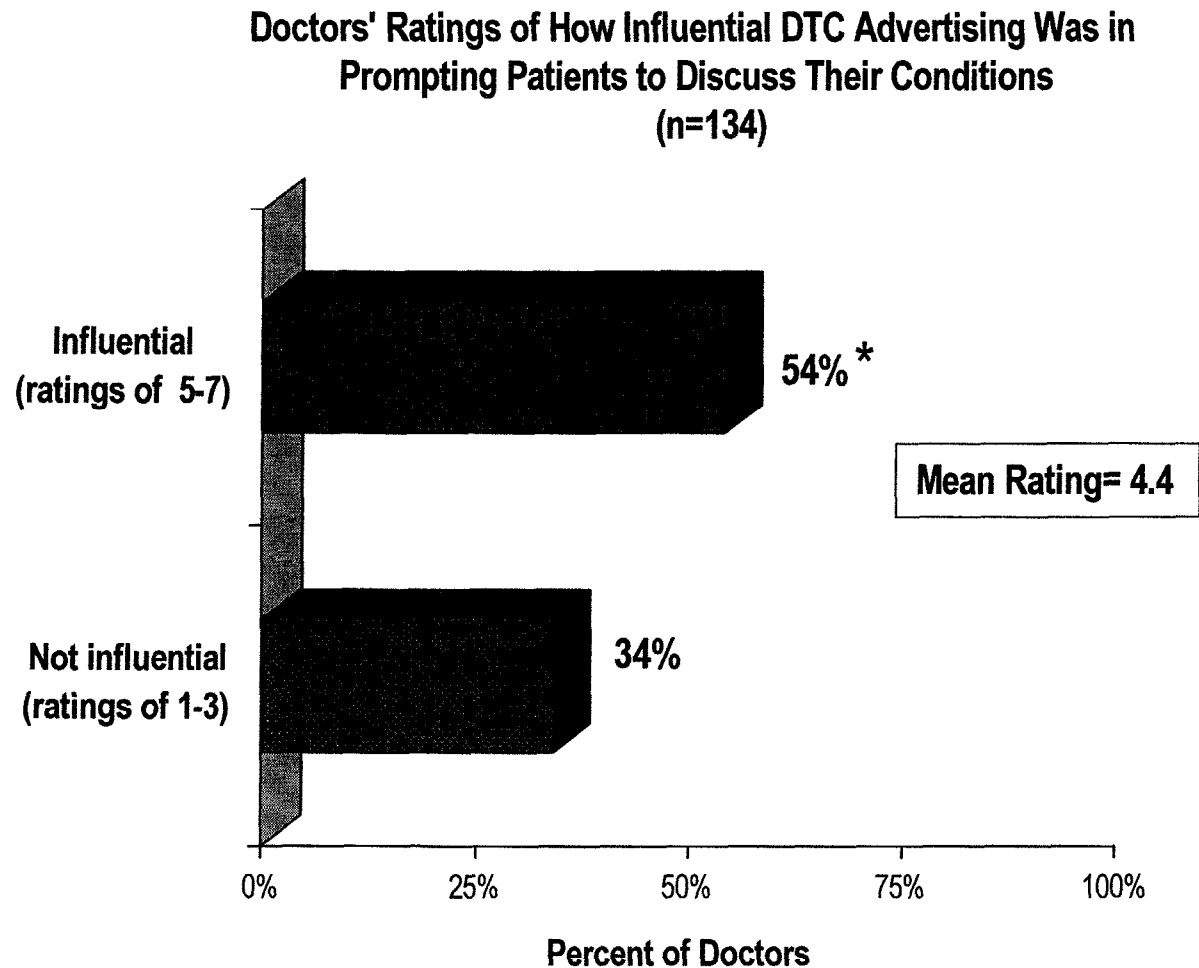
Q.27.05. What negative effects did the patient's seeing a DTC ad have on your interaction?

*(n<20); caution should be used in interpreting these results; figures in parentheses are actual numbers of responses

III. Impact of DTC Ads on the Quality of Discussions

DTC Ads Prompt Patients to Talk About Their Conditions

Over half of doctors (54%) reported that they think DTC ads are influential in getting patients to discuss their conditions.



Base: Doctors whose patients mentioned DTC ads

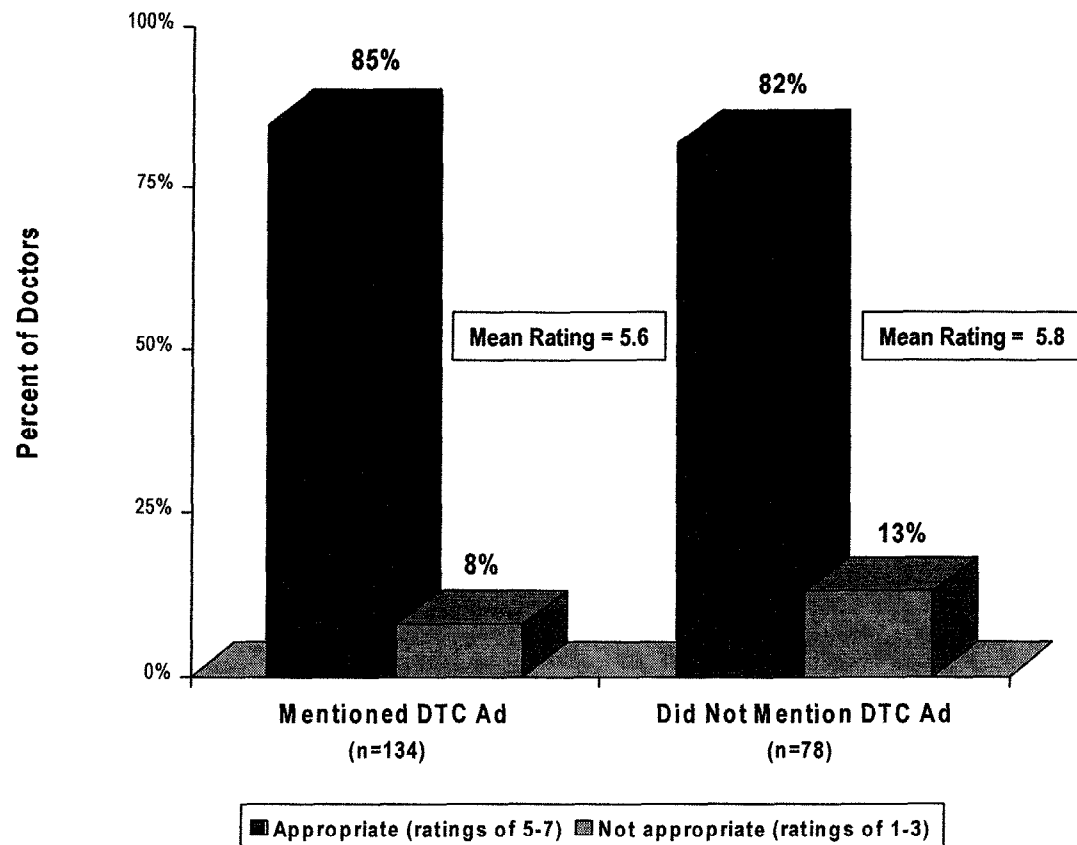
Q.27.11. On a scale of 1 to 7, how influential was the DTC ad in getting this patient to discuss his/her condition?

*Statistically different ($p < .10$)

Patients Are Initiating Discussions About Appropriate Products

Four out of five doctors reported that the specific brands their patients asked about were appropriate types of cholesterol-lowering products, regardless of whether or not patients mentioned DTC ads.

Doctors' Ratings of the Appropriateness of Cholesterol-Lowering Medications Mentioned By Their Patients



Base: Total doctors

Q.12.01. On a scale of 1 to 7, how appropriate do you feel a drug like Lipitor/Pravachol/Zocor is for this patient?

DTC Ads Are Prompting Thorough Discussions About Appropriate Products

Patients who mentioned DTC ads were more likely than those who did not to ask their doctors about the products' efficacy, side effects, appropriateness, insurance coverage, and how they compare to their current medications.

Percentage of Doctors Whose Patients Asked About Specific Issues		
	<u>Mentioned DTC Ad</u>	<u>Did Not Mention DTC Ad</u>
	<u>(A)</u>	<u>(B)</u>
	<u>%</u>	<u>%</u>
Efficacy	75 ^B	58
Side effects	78 ^B	67
Appropriateness of medication	91 ^B	81
Cost	46	42
Insurance coverage	47 ^B	29
Alternative prescription medications	40	32
Alternatives to medication	53	42
	(n=134)	(n=78)
Whether medication is better than current medication	78 ^B	60
	(n=55)	(n=50)

Base: Total doctors

Q.15.00/01. Did your patient ask you about the efficacy/side effects of Lipitor/Pravachol/Zocor?

Q.15.02/03. Did your patient ask your opinion about whether or not Lipitor/Pravachol/Zocor is right for him/her/ is better for him/her than his/her current medication?

Q.16.00/01. Did the patient ask about the cost of Lipitor/Pravachol/Zocor/ if his or her insurance plan covered the medication?

Q.17.00/01. Did the patient ask about alternative prescription medications/ alternatives to medication such as diet and exercise?

DTC Ads Are Prompting Doctors to Discuss Products with Patients More Thoroughly

When patients did not ask about specific issues, including efficacy, side effects, the drugs' appropriateness, and alternatives to medication, doctors were more likely to initiate discussions about these issues with patients who mentioned DTC ads than with patients who did not mention DTC ads.

Percentage of Doctors Who Discussed Specific Issues Even Though Their Patients Did Not Ask About These Issues		
	<u>Mentioned DTC Ad</u>	<u>Did Not Mention DTC Ad</u>
	<u>(A)</u>	<u>(B)</u>
	<u>%</u>	<u>%</u>
Efficacy (n=33, 33)	82 ^B	58
Side effects (n=28, 26)	64 ^B	27
Appropriateness of medication (n=12, 15)	92 ^B	53
Cost (n=73, 45)	23	20
Alternatives to prescription medications (n=81, 53)	43	30
Alternatives to medication (n=63, 45)	78 ^B	53
Whether medication is better than current medication (n=12, 20)	33	15

Base: Doctors whose patients did not ask about efficacy/side effects/appropriateness/whether medication is better than current medication/alternatives to prescription medication/alternatives to medication

Q.18.00/01. Did you and the patient discuss the efficacy/side effects of Lipitor/Pravachol/Zocor?

Q.18.02/03. Did you and the patient discuss whether or not Lipitor/Pravachol/Zocor is right for him/her/ is better for him/her than his/her current medication?

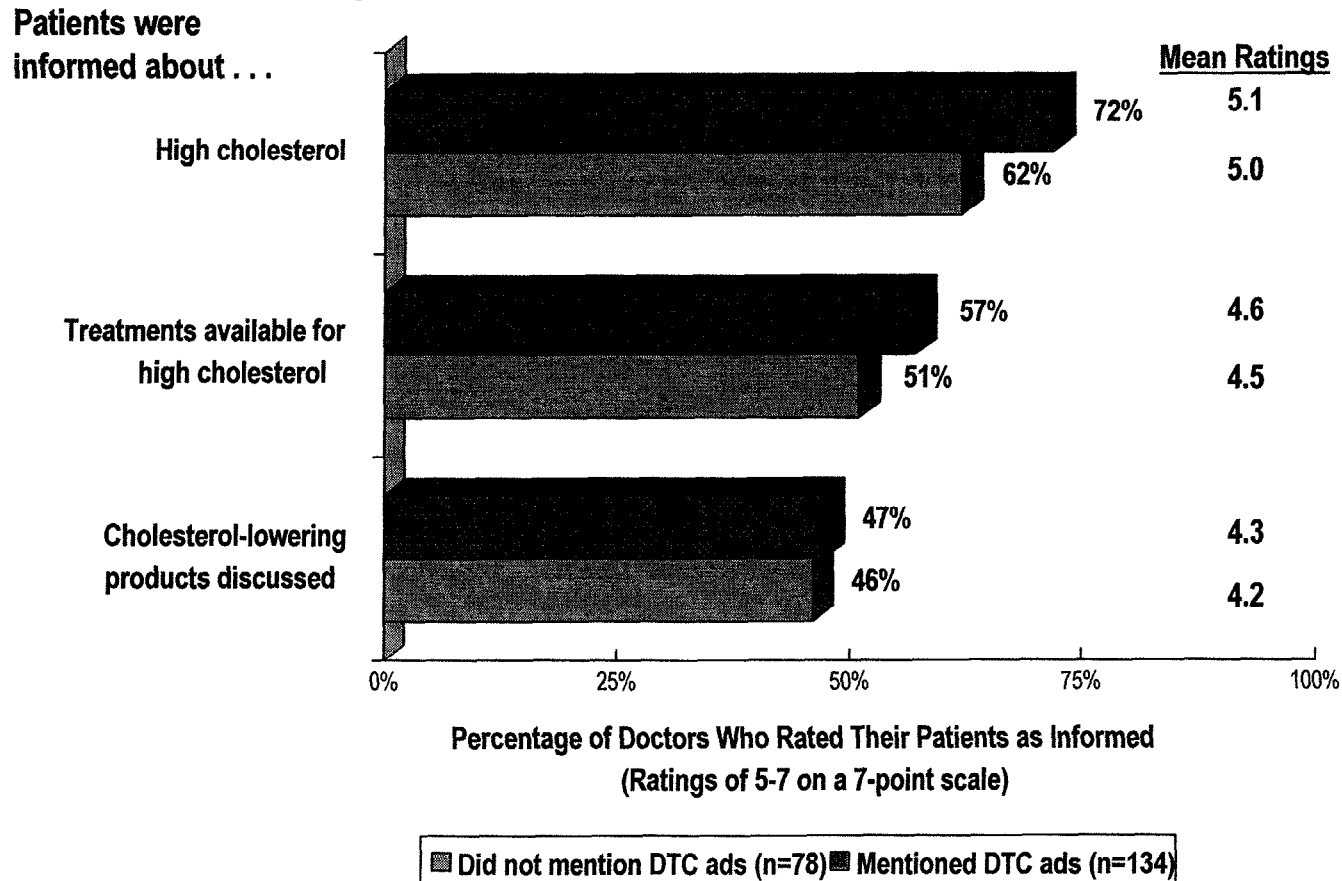
Q.18.04. Did you and the patient discuss the cost of the medication?

Q.19.00/01. Did you and the patient discuss alternative prescription medications/ alternatives to medication such as diet, exercise, or lifestyle changes?

DTC Ads Are Providing Patients With Information About High Cholesterol

Patients who mentioned DTC ads were directionally more likely than those who did not to be considered informed by their doctors about their high cholesterol conditions (72% vs 62%; not statistically different), the treatment of high cholesterol (57% vs. 51%; not statistically different), and about cholesterol-lowering products (47% vs. 46%, not statistically different).

Doctors' Ratings of How Informed Their Patients Were Regarding High Cholesterol Condition, Treatments, and Products



Base: Total doctors

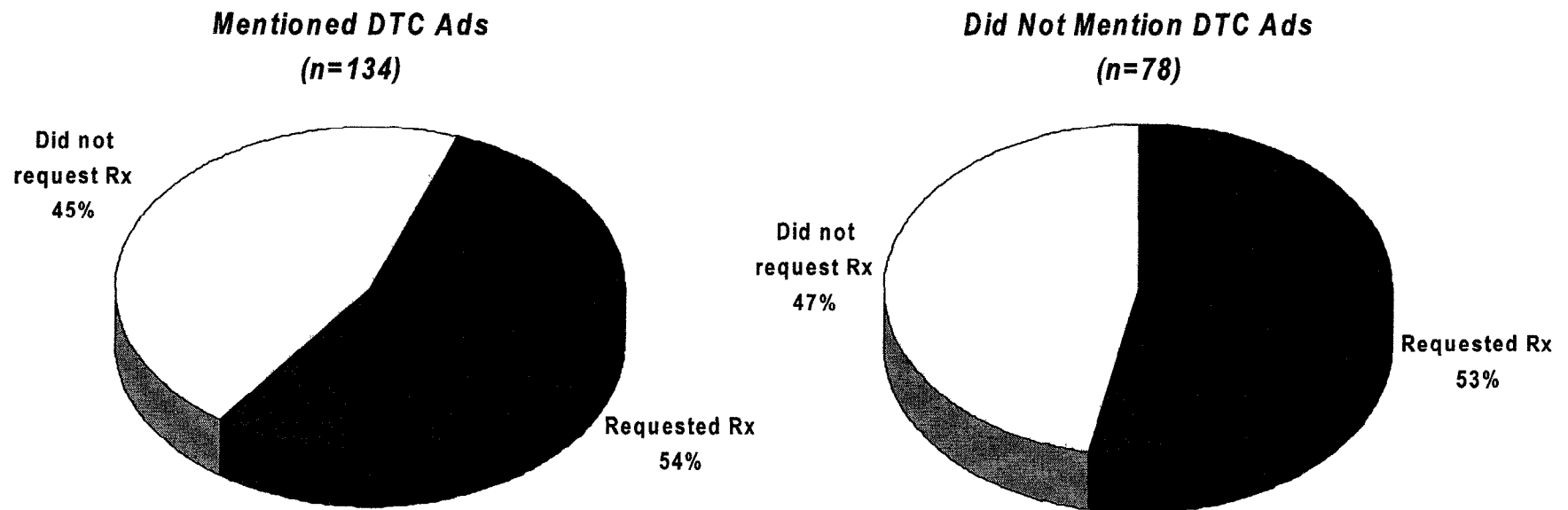
Q.12.02/03/04. On a scale of 1 to 7, how informed was the patient about his or her high cholesterol condition/ treatments for high cholesterol available to him or her/ this product?

IV. Impact of DTC Ads on the Outcomes of Visits

Substantial Proportions of Patients Are Requesting Prescriptions

Regardless of whether or not patients mentioned DTC ads, approximately half of discussions resulted in patient requests for prescriptions.

Percentage of Patients Who Requested Prescriptions for the Medications They Discussed



Base: Doctors whose patients did not mention DTC advertising
Q.21. Did the patient request a prescription for Lipitor/Pravachol/Zocor?

Doctors Are Reacting Favorably to Patients' Requests for Prescriptions

Doctors' reactions to patients' requests for prescriptions were overwhelmingly positive, regardless of whether or not patients mentioned DTC ads. None of the doctors interviewed reacted negatively to patient requests. (For details, see verbatims in Appendix.)

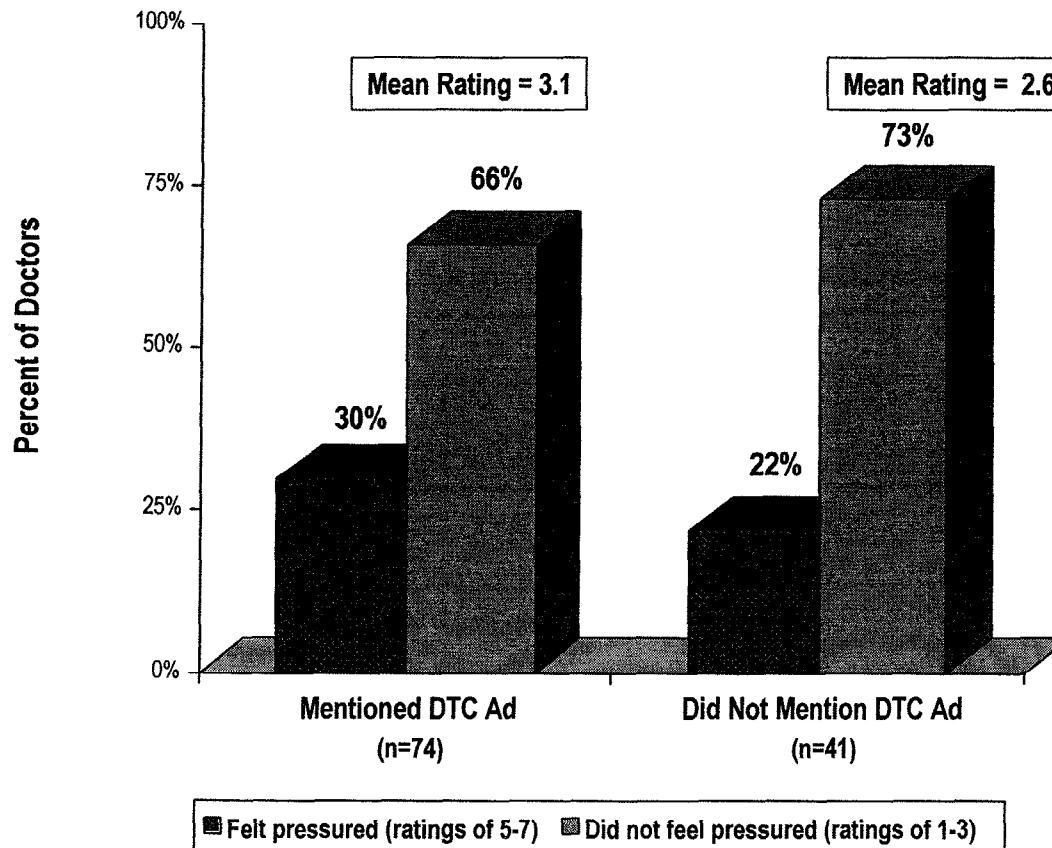
Doctors' Reactions to Patient Requests		
-Top Mentions-		
	<u>Mentioned DTC Ad</u>	<u>Did Not Mention DTC Ad</u>
	<u>(A)</u>	<u>(B)</u>
	<u>%</u>	<u>%</u>
<u>Positive Reaction (Net)</u>	<u>82</u>	<u>90</u>
Thought request was reasonable/good	31	41
Positive response (unspecified)	27	14
Patients becoming more informed/educated	23	21
Product is effective	16	14
Encouraged/motivated patient to take active role in decision-making	13	14
Provided opportunity to discuss product with patient	15	3
<u>Neutral Reaction (Net)</u>	<u>15</u>	<u>10</u>
Surprised at request	3	7
Patients becoming more aware of DTC advertising	5	0
	(n=62)	(n=29)

Base: Doctors whose patients mentioned DTC advertising and requested prescriptions for the medications they discussed.
Q.21.01. Other than your prescribing decision, describe your reaction to the patient's request for Lipitor/Pravachol/Zocor.

Doctors Do Not Report Feeling Pressured to Grant Patients' Requests for Prescriptions

Regardless of whether or not patients mentioned DTC ads, a majority of doctors reported that they do not feel pressured to grant their patients' requests for prescriptions for cholesterol-lowering products. However, reported pressure was directionally higher among doctors whose patients mentioned ads (30% vs. 22%; not statistically different).

Rating of the Pressure Felt By Doctors to Grant Patients' Requests for Prescriptions



Base: Doctors whose patients requested prescriptions for the medications they discussed
 Q.22. On a scale from 1 to 7, how much pressure did you feel to grant the patient's request?

Discussions of DTC Ads Are Not Lowering Prescribing Rates

Overall, at least two-thirds of patients are receiving prescriptions for the medications discussed. A larger proportion of patients who mentioned DTC ads than those who did not received prescriptions (75% vs. 68%; not statistically different). Doctors' prescribing rate was significantly higher for patients who requested prescriptions than for those who did not request prescriptions, whether or not DTC ads were mentioned.

Percentage of Doctors Who Prescribed Cholesterol-Lowering Medications		
	<u>Mentioned DTC Ad</u>	<u>Did Not Mention DTC Ad</u>
	<u>%</u>	<u>%</u>
<u>Received prescription</u>	75	68
<i>Base: Total doctors</i>	(n=134)	(n=78)
<u>Received prescription</u>	92	85
<i>Base: Doctors whose patients requested prescriptions</i>	(n=74)	(n=41)
<u>Received prescription</u>	53	49
<i>Base: Doctors whose patients did not request prescriptions</i>	(n=60)	(n=37)

Base: Total doctors

Q.23.00. Did you start the patient on Lipitor/Pravachol/Zocor?

Granting Patients' Requests for Prescriptions May Influence Patient Compliance

Doctors were asked to rate how granting patients' requests for prescriptions of cholesterol-lowering drugs would influence compliance. Nearly all doctors thought that granting requests would have a positive influence on the likelihood of patients' filling their prescriptions, taking the medication as prescribed, and taking the medication for the prescribed length of therapy. Over two-thirds of doctors thought there would be a positive influence on the likelihood of patients' tolerating nuisance side effects, and engaging in lifestyle changes such as diet and exercise. No significant reduction in ratings occurred when patients mentioned DTC ads.

Percentage of Doctors Who Thought That Patients' Receipt of Requested Medication Would Have a Positive Influence on Specific Patient Behaviors		
	<u>Mentioned DTC</u>	<u>Did Not Mention</u>
	<u>Ad</u>	<u>DTC Ad</u>
	<u>%</u>	<u>%</u>
Filling prescriptions	91	94
Taking medication as prescribed	96	94
Taking medication for prescribed length of therapy	88	94
Tolerating nuisance side effects	68	71
Engaging in lifestyle changes such as diet and exercise	72	65
	(n=68)	(n=34)

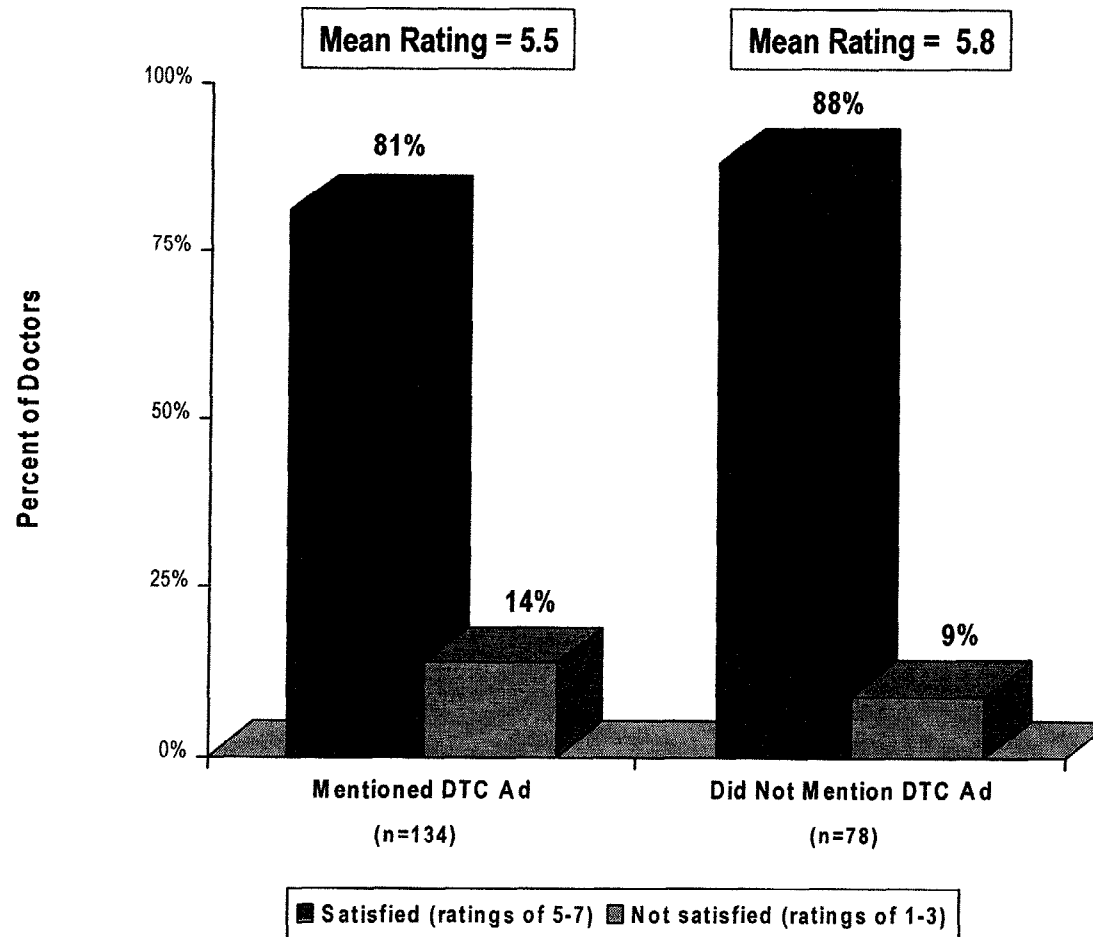
Base: Doctors whose patients received the medication they requested

Q.25.00/01/02/03/04. What influence do you think receiving the medication he/she requested will have on the patient's likelihood of filling the prescription/taking the medication as prescribed/taking the medication for the prescribed length of therapy/tolerating nuisance side effects/engaging in lifestyle changes, such as sticking to a low-fat diet and exercising regularly?

Doctors Are Reporting Satisfaction with Office Visits

Four out of five doctors reported that they were satisfied with the outcomes of these office visits. There was no significant reduction in satisfaction when patients mentioned DTC ads.

Rating of Doctors' Satisfaction with Visits



Base: Total doctors

Q.26. On a scale of 1 to 7, where 1 = Not at all satisfied and 7 = Very satisfied, how satisfied were you with the outcome of this office visit?

Market Measures Interactive

DTC Mood/Anxiety Disorders Doctor Dialogue

**Prepared For:
Pfizer, Inc.**

Fielded: July 2001

Methodology

The purpose of this study was to provide, from the doctor's perspective, a comprehensive assessment of doctor-patient discussions pertaining to the treatment of depression. Specifically, this study examined the role of DTC advertising in driving patients to doctors' offices, in shaping the dialogue between doctors and patients and in shaping the overall quality of these visits.

Fifteen-minute interviews were completed with 205 doctors: 104 primary care physicians (PCPs) and 101 psychiatrists (Psychs). Doctors were selected from Market Measures Interactive's Medical Marketing Conference, a survey resource consisting of more than 20,000 members representing 25 private-practice physicians and other health care specialties. Doctors were recruited by mail and each was instructed to call a 1-800 number to complete an Interactive Voice Response (IVR) interview, immediately after having a patient-initiated discussion about Prozac, Zoloft, Paxil, or Wellbutrin SR. Doctors received honoraria for their participation.

The field period for the study began on July 30 and closed on August 8.

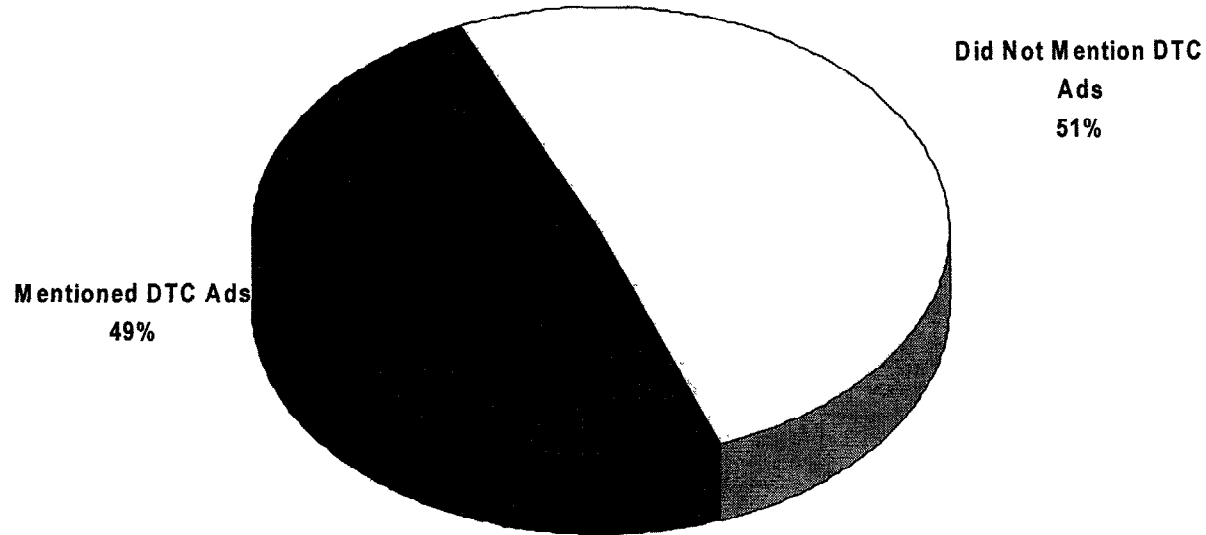
Unless noted, all findings reported are statistically significant at $p < .10$. In tables, statistically significant findings are noted using column letters as superscripts.

I. Role of DTC Ads in Bringing Patients into the Doctor's Office

Patients Seeking Treatment for Mood/Anxiety Disorders Are Mentioning DTC Ads

Doctors reported that of the patients who initiated brand-specific discussions about mood/anxiety disorders medications, 49% mentioned DTC ads.

Percentage of Doctors Whose Patients Mentioned DTC Ads
(n=205)



Base: Total doctors

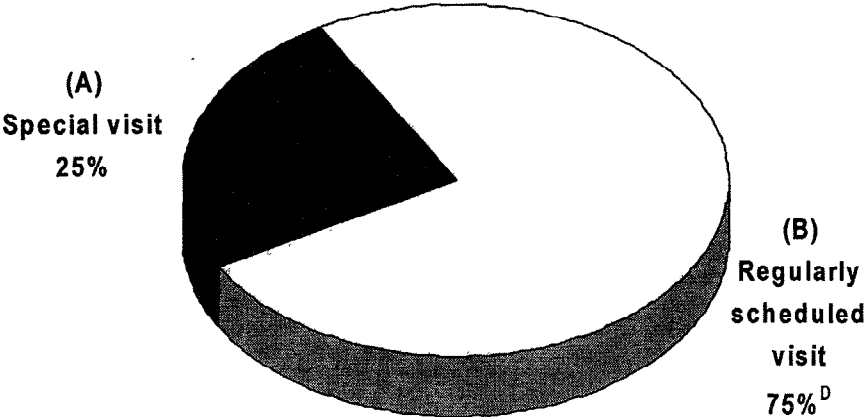
Q.27.00. Did this patient mention seeing or hearing any DTC advertisements for Paxil/Prozac/Wellbutrin SR/Zoloft, that is, an ad on television, in a consumer magazine or newspaper, or in a brochure in a pharmacy or doctor's office?

In General, Patients Are Not Making Special Visits to Discuss DTC Ads

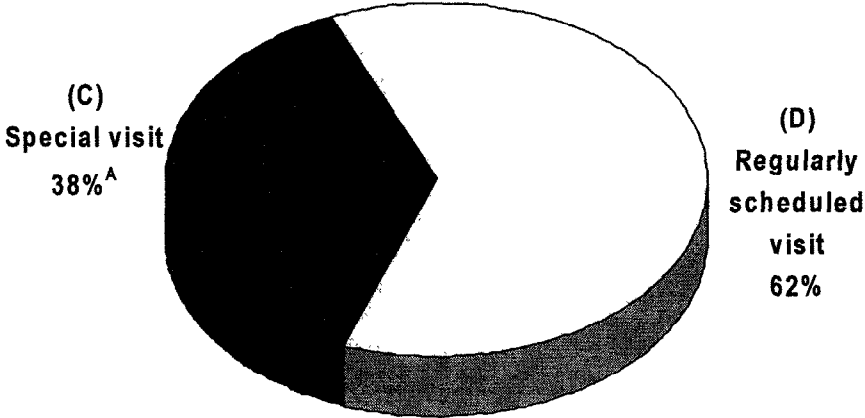
Most discussions about DTC ads are taking place during regularly scheduled visits. Patients who mentioned DTC ads were less likely than those who did not to make special visits to see their doctors (25% vs. 38%).

Percentage of Patients Who Made Special Visits

Mentioned DTC Ads
(n=100)



Did Not Mention DTC Ads
(n=105)



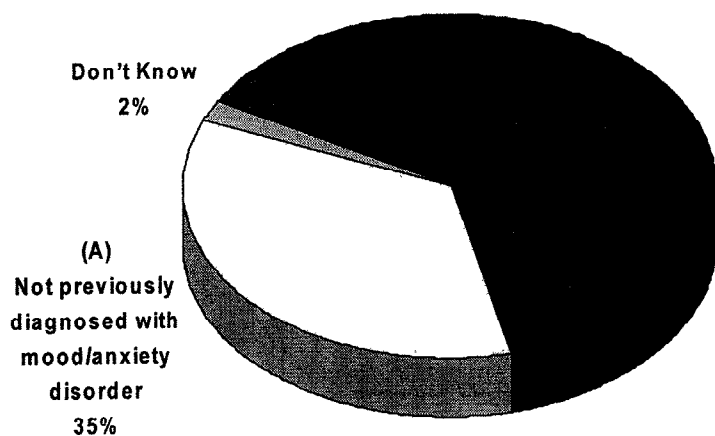
Base: Total doctors
Q.10.00. Was this a regularly scheduled visit for this patient?

DTC Ads Are Bringing the Right Patients to the Doctor's Office -- Undiagnosed Patients

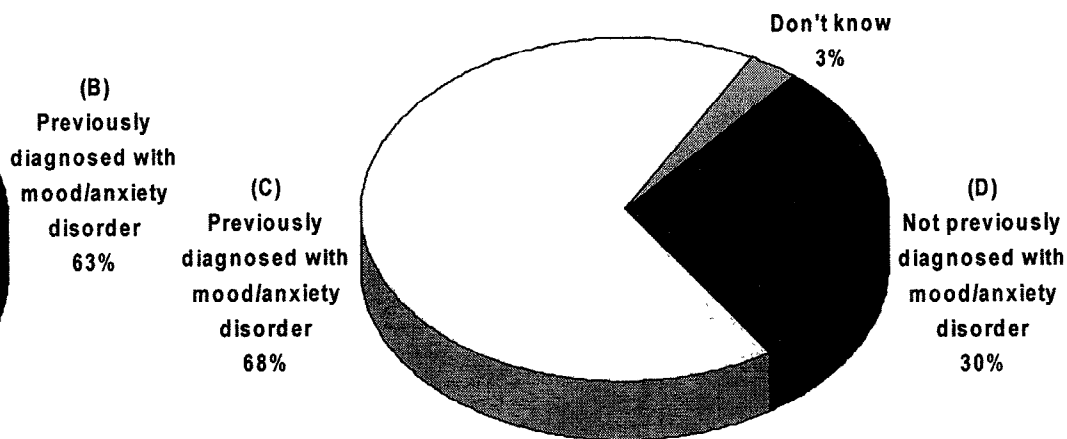
A larger proportion of patients who mentioned DTC ads than those who did not mention ads were undiagnosed at the time of their visits (35% vs. 30%; not statistically different).

Percentage of Patients Who Had Been Diagnosed with Mood/Anxiety Disorders Prior to Their Visits

Mentioned DTC Ads
(n=100)



Did Not Mention DTC Ads
(n=105)

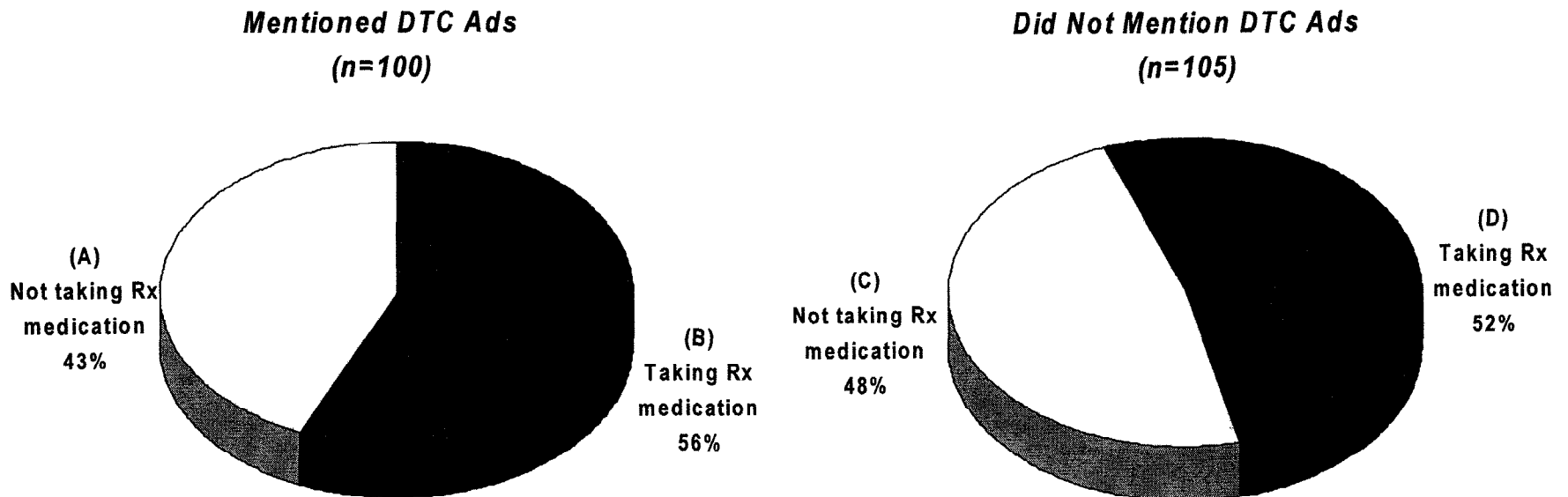


Base: Total doctors
Q.4. Was this patient previously diagnosed with this condition?

DTC Ads Are Bringing the Right Patients to the Doctor's Office -- Untreated Patients

Patients who mentioned DTC ads were slightly less likely than patients who did not mention ads to have been previously untreated for high cholesterol at the time of their visits (43% vs. 48%, respectively; not statistically different).

Percentage of Patients Who Were Taking Prescription Medication for Mood/Anxiety Disorders Prior to Their Visits



Base: Total doctors

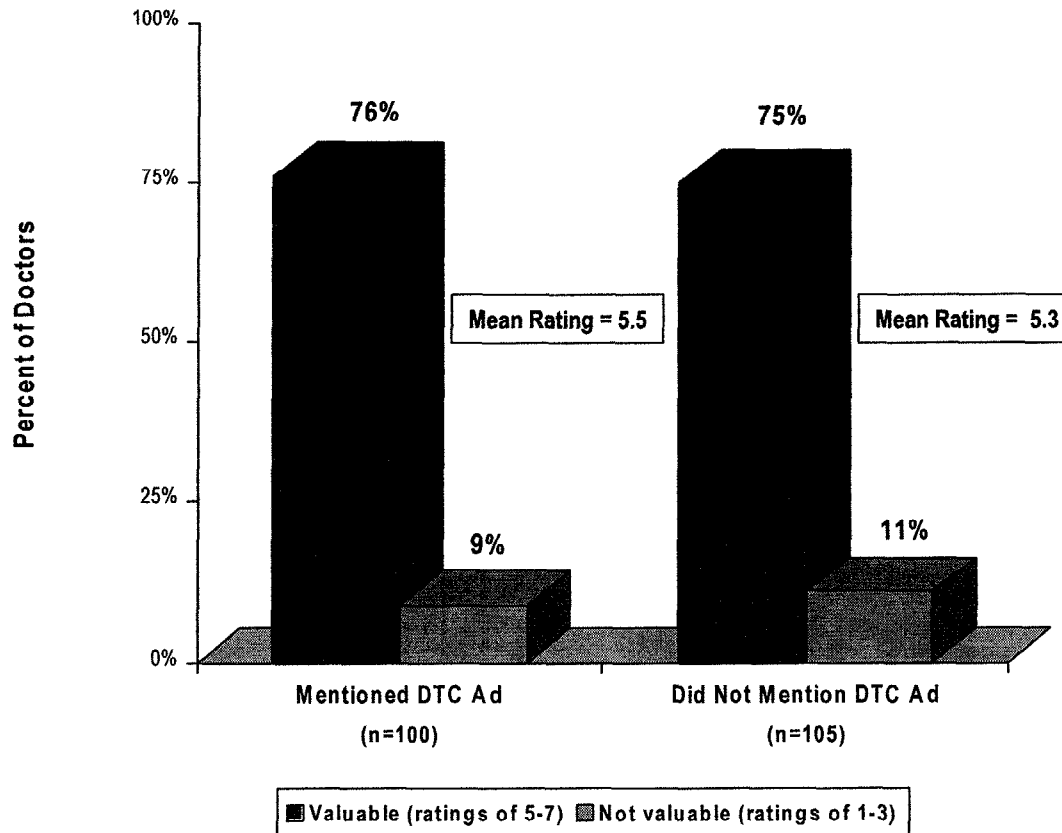
Q.7.00. Prior to this visit, was the patient taking any prescription medication to treat mood/anxiety disorders?

II. Impact of DTC Ads on Doctor-Patient Interaction

Discussions About Mood/Anxiety Disorders Medications Are Valuable

Over three-quarters of doctors found the discussions about mood/anxiety disorders medications to be a valuable part of the office visit. Doctors whose patients mentioned DTC ads were as likely as doctors whose patients did not mention ads to rate these discussions as valuable (76% vs. 75%, respectively; not statistically different).

Doctors' Ratings of the Value of Discussions



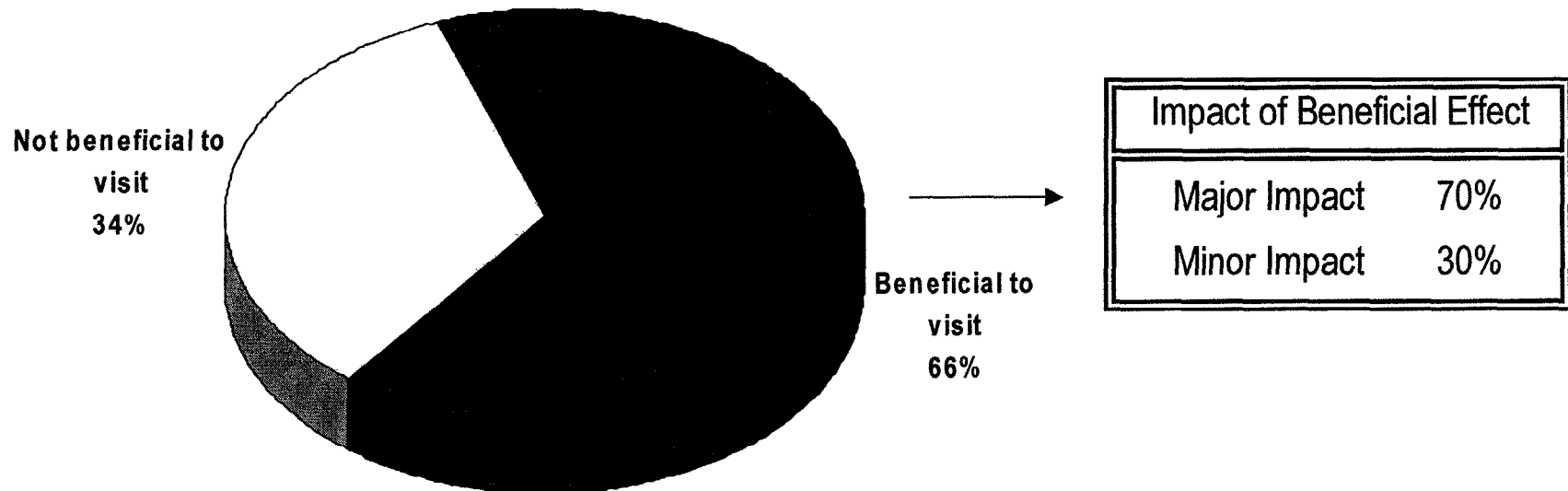
Base: Total doctors

Q.13.00. On a scale of 1 to 7, please rate how valuable you feel the patient's discussion about Paxil/Prozac/Wellbutrin SR/Zoloft was to the visit.

Patients' Awareness of DTC Ads Has Major Beneficial Effect on Office Visits

Three out of five doctors (66%) thought that their patients' seeing DTC ads had a beneficial effect on their visits, and 70% of these doctors felt that this beneficial effect had a major impact on the doctor-patient interaction.

**Percentage of Doctors Who Thought That Patients' Seeing DTC Ads Was Beneficial to Their Visits
(n=100)**



Base: Doctors whose patients mentioned DTC ads

Q.27.04. Did the fact that the patient saw a DTC ad have any beneficial effects on your interaction with him/her?

Q.27.05.1 Overall, would you say the beneficial effects had a major or minor impact on your interaction?

DTC Ads Inform Patients, Motivate Patients to Contact Their Doctors, and Increase Patient Receptivity to Treatment

When asked to describe the beneficial effects of patient awareness of DTC ads on the doctor-patient interaction, doctors most frequently mentioned that DTC ads inform and educate patients, motivate patients to contact their doctors for treatment information, and increase patients' receptivity to discussing treatment. (For details, see verbatims in Appendix.)

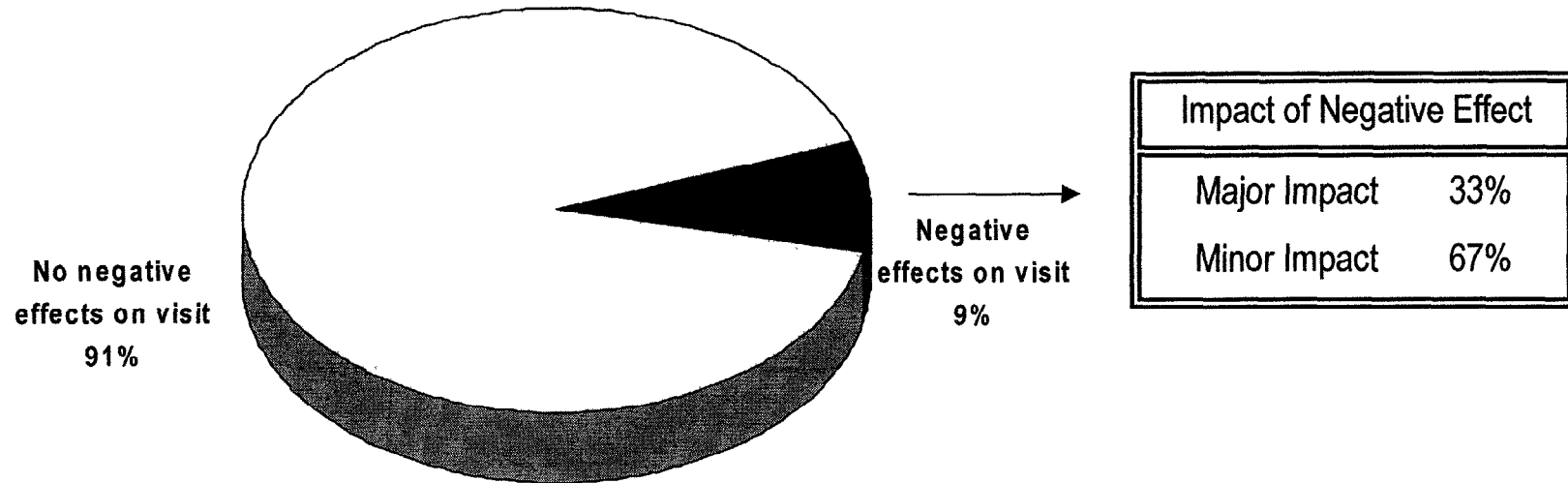
Beneficial Effects of Patient Awareness of DTC Ads on Doctor-Patient Interaction	
-Top Mentions-	
	<u>Total</u>
	<u>%</u>
<u>Ads Informed/Educated/Increased Knowledge of Patients (Net)</u>	<u>45</u>
Ads inform/educate consumers	28
<u>Ads Encouraged/Motivated Patients to Contact Doctor for Treatment Information/Options (Net)</u>	<u>33</u>
Discussions initiated by patients to explore treatment options	14
Ad encouraged patient to contact doctor for more information	11
<u>Ads Increased Patient Receptivity to Discussing/Trying Treatment (Net)</u>	<u>23</u>
Patient more receptive to trying medication/easier for doctor to prescribe	14
Ad increased awareness of product	11
	(n=64)

Base: Doctors who said that their patients' seeing DTC ads had a beneficial effect on the interaction
 Q.27.05. What beneficial effects did the patient's seeing a DTC ad have on your interaction?

Patients' Awareness of DTC Ads Has Minor Negative Effect on Interaction

Only 9% of doctors thought that their patients' seeing DTC ads had a negative effect on their visits, and 67% of these doctors felt that this negative effect had a minor impact on the doctor-patient interaction.

**Percentage of Doctors Who Thought That Patients' Seeing DTC Ads Had a Negative Effect on Their Visits
(n=100)**



Base: Doctors whose patients mentioned DTC ads

Q.27.06. Did the fact that the patient saw a DTC ad have any negative effects on your interaction with him/her?

Q.27.10. Overall, would you say the beneficial effects had a major or minor impact on your interaction?

Patients' Awareness of DTC Ads Has Minor Negative Effect on Interaction (Cont'd)

The eight doctors who said that their patients' seeing DTC ads had a negative effect on their interactions were asked to describe these negative effects. Doctors most frequently mentioned that DTC ads are misleading and lack important information, and that they feel pressured to prescribe the products discussed. (For details, see verbatims in Appendix.)

Negative Effects of Patient Awareness of DTC Ads on Doctor-Patient Interaction	
-Top Mentions-	
	Total
	%
Misleading	(3)
Ad lacked important information	(3)
Doctor felt pressured to prescribe product/put doctor in awkward position	(3)
Time consuming	(2)
Patients are not educated enough to understand ads	(1)
Do not like DTC ads	(1)
	(n=8)*

Base: Doctors who said that their patients' seeing DTC ads had a negative effect on the interaction

Q.27.05. What negative effects did the patient's seeing a DTC ad have on your interaction?

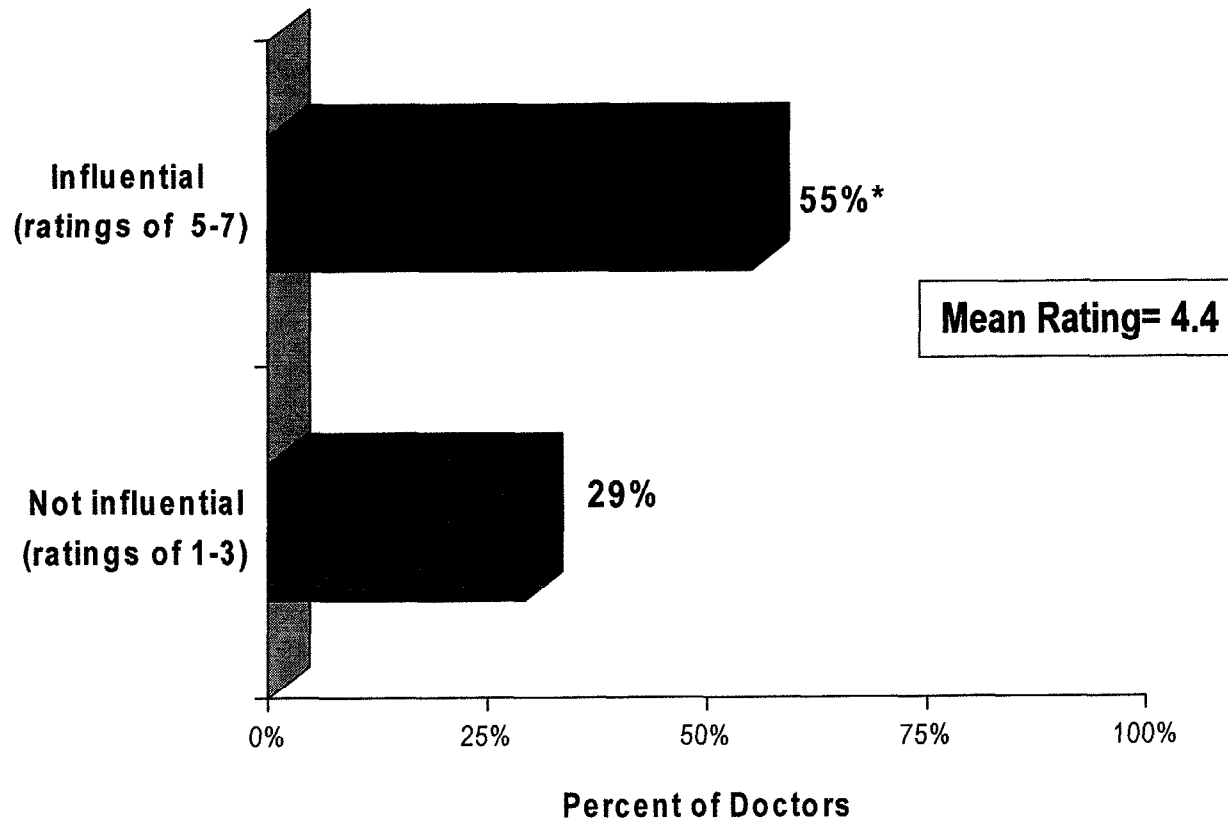
*(n<20); caution should be used in interpreting these results; figures in parentheses are actual numbers of responses

III. Impact of DTC Ads on the Quality of Discussions

DTC Ads Prompt Patients to Talk About Their Conditions

Over half of doctors (55%) reported that they think DTC ads are influential in getting patients to discuss their conditions.

Doctors' Ratings of How Influential DTC Advertising Was in Prompting Patients to Discuss Their Conditions (n=100)



*Statistically different ($p < .10$)

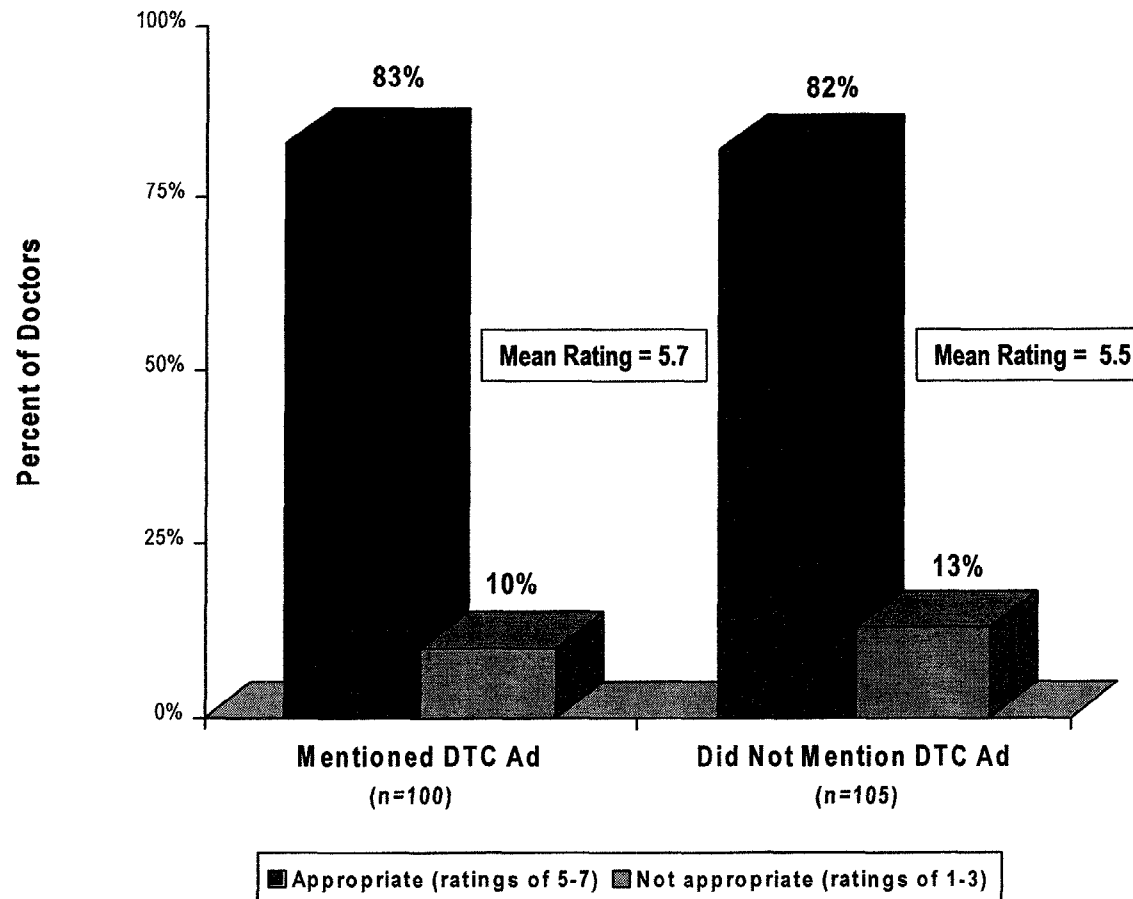
Base: Doctors whose patients mentioned DTC ads

Q.27.11. On a scale of 1 to 7, how influential was the DTC ad in getting this patient to discuss his/her condition?

Patients Are Initiating Discussions About Appropriate Products

Four out of five doctors reported that the specific brands their patients asked about were appropriate types of mood/anxiety disorders medications, regardless of whether or not patients mentioned DTC ads.

Doctors' Ratings of the Appropriateness of Mood/Anxiety Disorders Medications Mentioned By Their Patients



Base: Total doctors

Q.12.01. On a scale of 1 to 7, how appropriate do you feel a drug like Paxil/Prozac/Wellbutrin SR/Zoloft is for this patient?

DTC Ads Are Prompting Thorough Discussions About Appropriate Products

Patients who mentioned DTC ads were more likely than those who did not to ask their doctors about the products' insurance coverage, and how they compare to their current medications. Although not statistically different, larger proportions of patients who mentioned DTC ads than those who did not asked their doctors about the products' efficacy, appropriateness, cost, and if there are alternatives to taking prescription medication.

Percentage of Doctors Whose Patients Asked About Specific Issues		
	<u>Mentioned DTC Ad</u>	<u>Did Not Mention DTC Ad</u>
	<u>(A)</u>	<u>(B)</u>
	<u>%</u>	<u>%</u>
Efficacy	78	71
Side effects	78	79
Appropriateness of medication	92	86
Cost	25	20
Insurance coverage	32 ^B	18
Alternative prescription medications	35	36
Alternatives to medication	23	20
	(n=100)	(n=105)
Whether medication is better than current medication	73 ^B	55
	(n=56)	(n=55)

Base: Total doctors

Q.15.00/01. Did your patient ask you about the efficacy/side effects of Paxil/Prozac/Wellbutrin SR/Zoloft?

Q.15.02/03. Did your patient ask your opinion about whether or not Paxil/Prozac/Wellbutrin SR/Zoloft is right for him/her/ is better for him/her than his/her current medication?

Q.16.00/01. Did the patient ask about the cost of Paxil/Prozac/Wellbutrin SR/Zoloft/ if his or her insurance plan covered the medication?

Q.17.00/01. Did the patient ask about alternative prescription medications/ alternatives to medication such as diet and exercise?

DTC Ads Are Prompting Doctors to Discuss Products with Patients More Thoroughly

When patients did not ask about specific issues, doctors were as likely to initiate discussions about these issues with patients who mentioned DTC ads than with patients who did not mention DTC ads. Directionally, doctors were more likely to discuss side effects, appropriateness, cost, and whether or not the products discussed are better than the patients' current medication with patients who mentioned DTC ads than with those who did not mention ads.

Percentage of Doctors Who Discussed Specific Issues Even Though Their Patients Did Not Ask About These Issues		
	<u>Mentioned DTC Ad</u>	<u>Did Not Mention DTC Ad</u>
	<u>(A)</u>	<u>(B)</u>
	<u>%</u>	<u>%</u>
Efficacy (n=22, 30)	77	77
Side effects (n=22, 22)	73	50
Appropriateness of medication (n=8, 15)*	75	73
Cost (n=73, 45)	15	10
Alternative to prescription medications (n=65, 67)	37	37
Alternative medication (n=77, 84)	26	31
Whether medication is better than current medication (n=15*, 25)	47	28

*(n<20); caution should be used in interpreting these results

Base: Doctors whose patients did not ask about efficacy/side effects/appropriateness/whether medication is better than current medication/alternatives to prescription medication/alternatives to medication

Q.18.00/01. Did you and the patient discuss the efficacy/side effects of Paxil/Prozac/Wellbutrin SR/Zoloft?

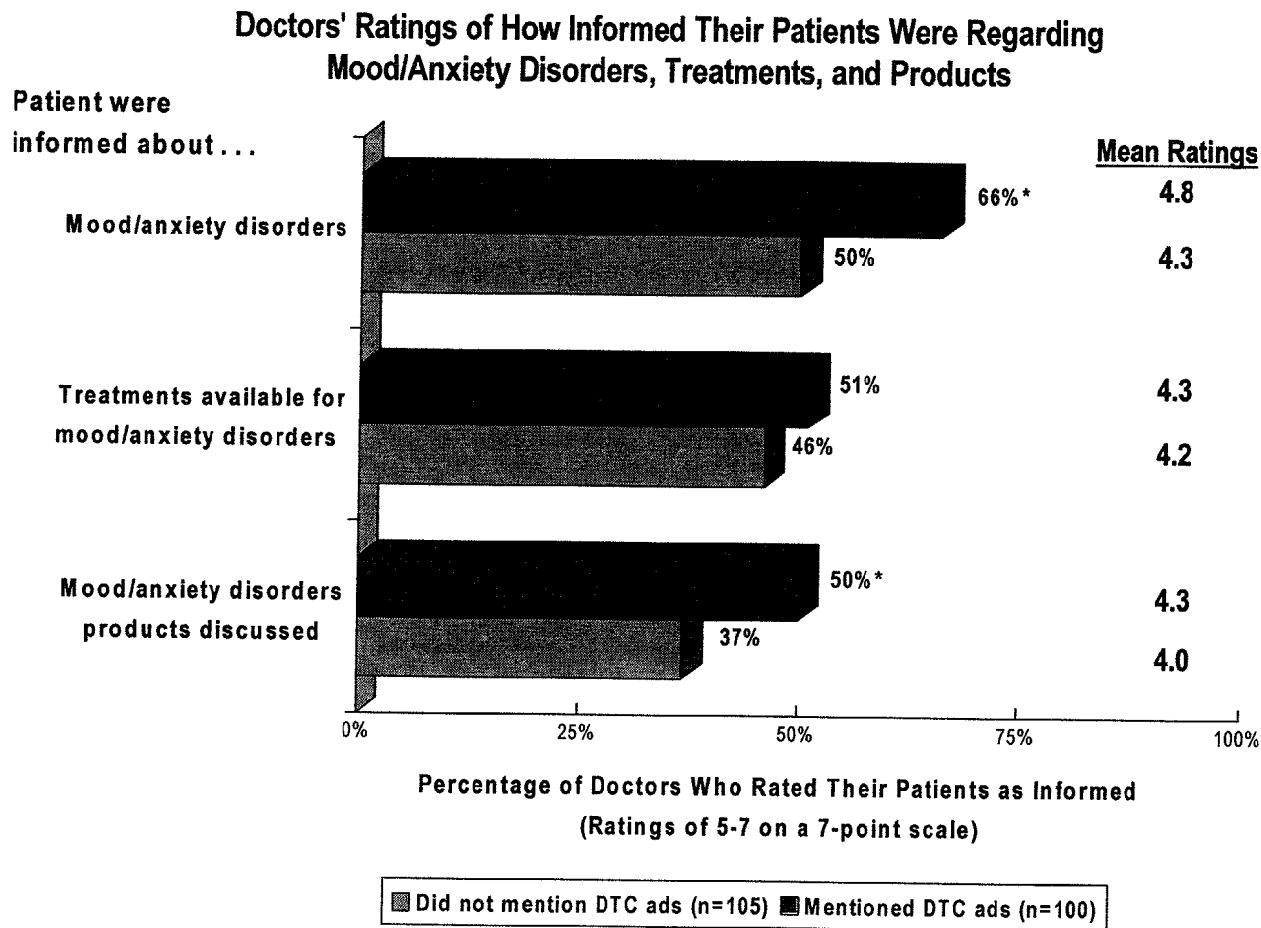
Q.18.02/03. Did you and the patient discuss whether or not Paxil/Prozac/Wellbutrin SR/Zoloft is right for him/her/ is better for him/her than his/her current medication?

Q.18.04. Did you and the patient discuss the cost of the medication?

Q.19.00/01. Did you and the patient discuss alternative prescription medications/ alternatives to medication such as diet, exercise, or lifestyle changes?

DTC Ads Are Providing Patients With Information About Mood/Anxiety Disorders

Patients who mentioned DTC ads were more likely than those who did not to be considered informed by their doctors about their mood/anxiety disorders (66% vs 50%) and about mood/anxiety disorders products (50% vs. 37%). Patients who mentioned DTC also were directionally more likely than those who did not to be considered informed about the treatment of mood/anxiety disorders (51% vs. 46%; not statistically different),



Base: Total doctors

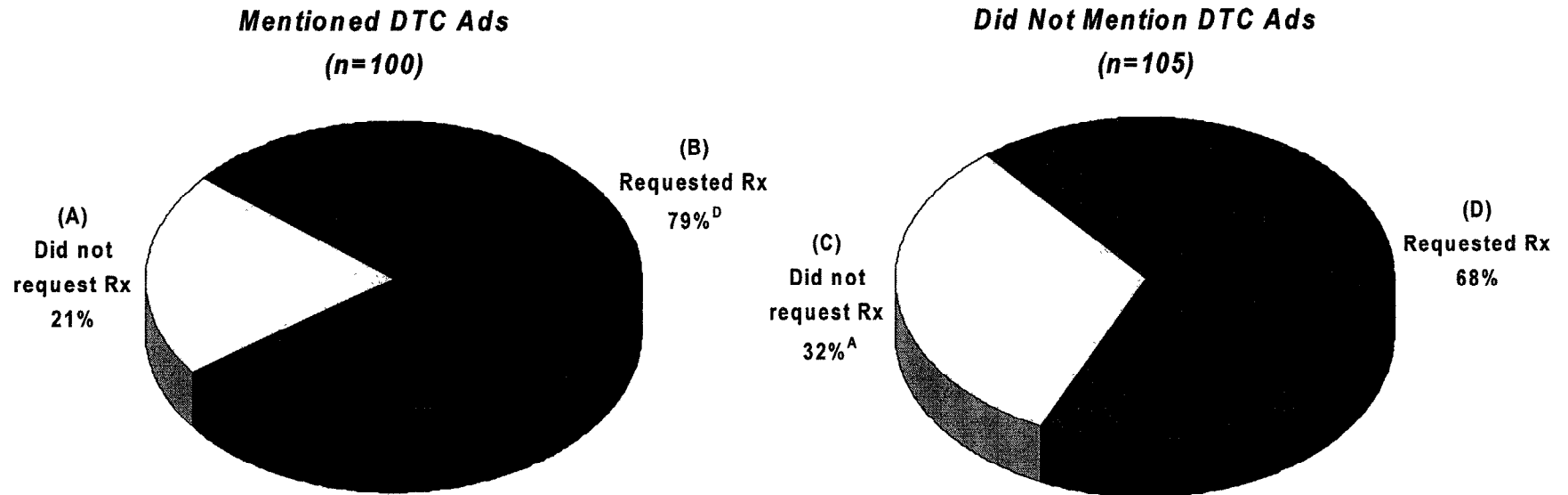
Q.12.02/03/04. On a scale of 1 to 7, how informed was the patient about his/her mood/anxiety disorder/ treatments for mood/anxiety disorders available to him/her/ this product?

IV. Impact of DTC Ads on the Outcomes of Visits

DTC Ads Are Increasing Patient Requests for Prescriptions

Patients who mentioned DTC ads were more likely to request prescriptions than those who did not mention ads (79% vs. 68%).

Percentage of Patients Who Requested Prescriptions for the Medications They Discussed



Base: Doctors whose patients did not mention DTC advertising
 Q.21. Did the patient request a prescription for Paxil/Prozac/Wellbutrin SR/Zoloff?

Doctors Are Reacting Favorably to Patients' Requests for Prescriptions

Doctors' reactions to patients' requests for prescriptions were overwhelmingly positive, regardless of whether or not patients mentioned DTC ads. Doctors whose patients mentioned DTC ads were more likely than doctors whose patients did not mention ads to describe their reactions as neutral (23% vs. 9%) or negative (9% vs. 1%).

Doctors' Reactions to Patient Requests		
-Top Mentions-		
	<u>Mentioned DTC Ad</u>	<u>Did Not Mention DTC Ad</u>
	<u>(A)</u>	<u>(B)</u>
	<u>%</u>	<u>%</u>
<u>Positive Reaction (Net)</u>	<u>93</u>	<u>90</u>
Thought request was reasonable/good	45	45
Positive response (unspecified)	29	39
Provided opportunity to discuss product with patient	28	19
Patients becoming more informed/educated	20	17
Product is effective	9	9
Encouraged/motivated patient to take active role in decision-making	7	6
<u>Neutral Reaction (Net)</u>	<u>23^B</u>	<u>9</u>
Patients becoming more aware of DTC advertising	10 ^B	1
Surprised at request	7	6
<u>Negative Reaction (Net)</u>	<u>9^B</u>	<u>1</u>
Negative response (unspecified)	6	1
Patient not completely informed	4	0
	(n=69)	(n=69)

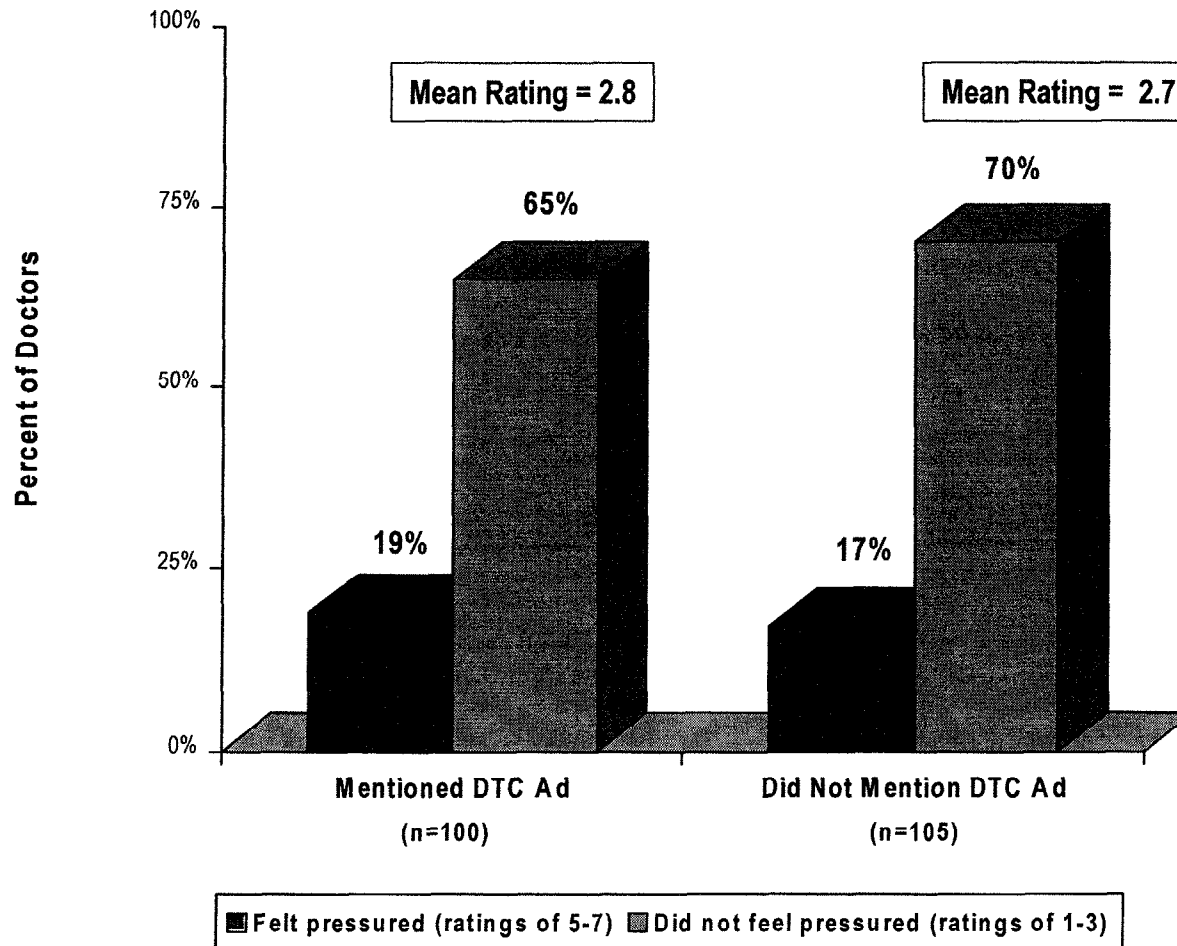
Base: Doctors whose patients mentioned DTC advertising and requested prescriptions for the medications they discussed.

Q.21.01. Other than your prescribing decision, describe your reaction to the patient's request for Paxil/Prozac/Wellbutrin SR/Zoloft.

Doctors Are Not Feeling Pressured to Grant Patients' Requests for Prescriptions

Regardless of whether or not patients mentioned DTC ads, a majority of doctors reported that they do not feel pressured to grant their patients' requests for prescriptions for mood/anxiety disorders medications.

Rating of the Pressure Felt By Doctors to Grant Patients' Requests for Prescriptions



Base: Doctors whose patients requested prescriptions for the medications they discussed
 Q.22. On a scale from 1 to 7, how much pressure did you feel to grant the patient's request?

Discussions of DTC Ads Are Not Lowering Prescribing Rates

Overall, more than three-quarters of patients are receiving prescriptions for the medications discussed, and patients who mentioned DTC ads were as likely as those who did not to start on the mood/anxiety disorders medications they discussed (78% vs. 80%; not statistically different). Doctors' prescribing rate was significantly higher for patients who requested prescriptions than for those who did not request prescriptions, whether or not DTC ads were mentioned.

Percentage of Doctors Who Prescribed Mood/Anxiety Disorders Medications		
	<u>Mentioned DTC Ad</u>	<u>Did Not Mention DTC Ad</u>
	<u>%</u>	<u>%</u>
<u>Received prescription</u>	78	80
<i>Base: Total doctors</i>	(n=100)	(n=105)
<u>Received prescription</u>	89	92
<i>Base: Doctors whose patients requested prescriptions</i>	(n=79)	(n=71)
<u>Received prescription</u>	38	56
<i>Base: Doctors whose patients did not request prescriptions</i>	(n=21)	(n=34)

Base: Total doctors

Q.23.00. Did you start the patient on Paxil/Prozac/Wellbutrin SR/Zoloft?

Granting Patients' Requests for Prescriptions May Influence Patient Compliance

Doctors were asked to rate how granting patients' requests for prescriptions of mood/anxiety disorders drugs would influence compliance. Nearly all doctors thought that granting requests would have a positive influence on the likelihood of patients' filling their prescriptions and taking the medication as prescribed. A majority of doctors thought there would be a positive influence on the likelihood of patients' taking the medication for the prescribed length of time, on tolerating nuisance side effects, and engaging in lifestyle changes such as diet and exercise. No significant reduction in ratings occurred when patients mentioned DTC ads.

Percentage of Doctors Who Thought That Patients' Receipt of Requested Medication Would Have a Positive Influence on Specific Patient Behaviors

	<u>Mentioned DTC</u>	<u>Did Not Mention</u>
	<u>Ad</u>	<u>DTC Ad</u>
	<u>%</u>	<u>%</u>
Filling prescriptions	93	95
Taking medication as prescribed	99	94
Taking medication for prescribed length of therapy	86	78
Tolerating nuisance side effects	69	62
Engaging in lifestyle changes	51	49
	(n=70)	(n=65)

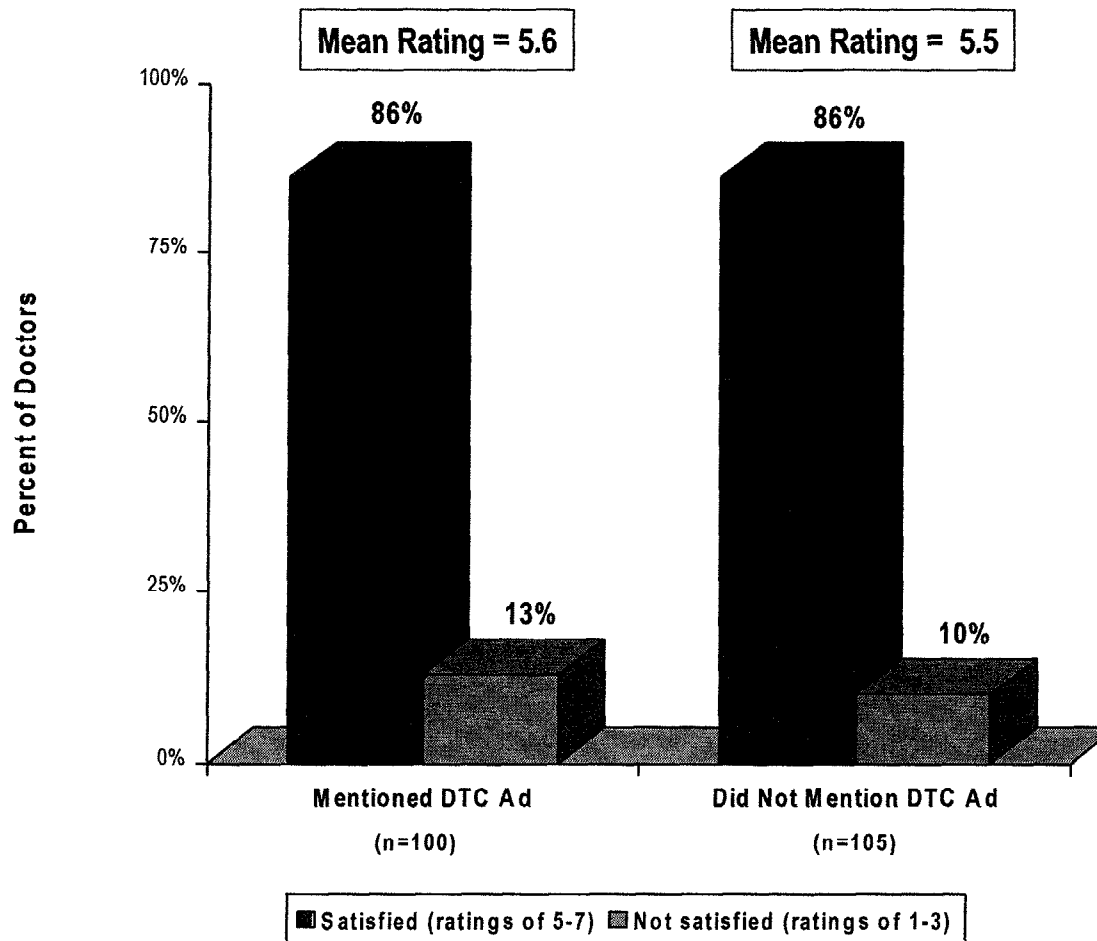
Base: Doctors whose patients received the medication they requested

Q.25.00/01/02/03/04. What influence do you think receiving the medication he/she requested will have on the patient's likelihood of filling the prescription/taking the medication as prescribed/taking the medication for the prescribed length of therapy/tolerating nuisance side effects/engaging in lifestyle changes, such as sticking to a low-fat diet and exercising regularly?

Doctors Are Reporting Satisfaction with Office Visits

Eighty-six percent of doctors reported that they were satisfied with the outcomes of these office visits. Doctors were as satisfied with these discussions when patients mentioned DTC ads as when they did not.

Rating of Doctors' Satisfaction with Visits



Base: Total doctors

Q.26. On a scale of 1 to 7, where 1 = Not at all satisfied and 7 = Very satisfied, how satisfied were you with the outcome of this office visit?