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## Patients Take More Power Over Prescription Decisions

*New Pharma Insight Study Cites 24 Percent Increase in Prescription Abandonment;  
Preference for Generics: Two-Out-of-Three Scripts Filled in 2009*

BRIDGEWATER, N.J., March 16, 2010 - The results of a new study released today by Wolters Kluwer Pharma Solutions, Inc., a leading provider of scientific information and analytics to the pharmaceutical and biotech fields, is not exactly what the doctor ordered. The company's annual analysis of the U.S. pharma market suggests that the economy has led to increased patient participation in decisions about prescription drugs. What may be more striking, that rising influence often is at odds with a patient's physician.

The Pharma Insight report shows that commercial health plan patients abandoned new prescriptions at the pharmacy at a rate of 6.3 percent in 2009, which is up 24 percent over 2008. Consumers are becoming more price-sensitive toward pharmaceuticals, especially to brand-name medications. According to the data, the abandonment rate for new prescriptions of brand-name drugs alone was 8.6 percent in 2009, up 23 percent from 2008, and an astounding 68 percent since 2006. A prescription is considered abandoned when a script is submitted to a pharmacy but never picked up.

The study also reveals that 66 percent, or two-out-of-three prescriptions filled last year, were generic compared to 60 percent in 2008 and 50 percent in 2005. These statistics point to a rising number of lower priced market alternatives, and increasing access to those thanks to widespread health plan coverage and programs sponsored by mass retailers. Consumer selection of generics has become even more pronounced in a down economy. According to the data, there were 2.6 billion prescriptions filled for generic drugs in 2009 and 1.3 billion for brand-name medications.

"Today, patients wield more power and are more inclined to exert that influence in decisions about their prescription drugs," said Mark Spiers, President & CEO, Wolters Kluwer Pharma Solutions. "During tough economic times, consumers tend to think more with their pocketbooks. We're seeing increasing price-sensitivity to co-pay, and bolder moves by patients in making decisions about their drug therapy. Turning to lower-cost generics and, in some cases, walking away from prescriptions altogether are behaviors that help cushion the economic blow, but may have larger health consequences down the road."

### **Increasing Price-Sensitivity and Lower Tolerance to Co-pay**

The data bear out the point that patients appear to be less tolerant to co-pay than they were during the years leading up to the 2008 recession. The average co-pay for brand-name medications, the amount the patient pays, was only \$5 more in 2009 than it was in 2006 (\$31 on average in 2009, and \$26 in 2006). However, the rate at which patients abandoned those medications increased at a significantly higher rate, up 68 percent since 2006. This clearly points to patients quickly losing their tolerance to pay for pharmaceuticals even when co-pay remains relatively stable.

### **Nearly 15 Percent of New Prescriptions Go Unfilled**

The study also suggests that health plans continue to exert influence over prescription decisions including both commercial payers and increasingly Medicare. Denials for new prescriptions of brand-name drugs alone were down 1.4 percent over 2008, but up 22.5 percent since 2006. Denials are prescriptions that have been submitted to a pharmacy but rejected by a patient's health plan.

Taken together, patient abandonment and payer denials resulted in 14.4 percent of all new, commercial-plan prescriptions going unfilled in 2009, up 5.5 percent from 2008.

States with the highest overall new prescription abandonment rates for brand-name medications include Delaware, Florida, and North Carolina, all which were above 10 percent. Those with the highest denial rates for new prescriptions of brand-name meds include California, Delaware, Florida, Hawaii, Illinois, Maine, and Montana.

Pharma Insight's overview of the 2009 U.S. pharmaceutical market shows a 2.7 percent growth in total number of prescriptions filled compared to 2008, a slight recovery over the prior year. A total of 3.9 billion prescriptions were filled (TRx) compared to 3.8 billion in 2008 and 3.5 billion in 2006. However, overall industry growth is still showing a decline when looking at the five-year trend, according to the report. The compounded annual growth rate (CAGR) for the five-year period 2005-9 was 3.4 percent. This is slightly down from the five-year period ending in 2008 where the CAGR was 3.6 percent.

For additional information, visit the company's website at [www.wolterskluwerpharma.com](http://www.wolterskluwerpharma.com).

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*Editor's Note: For a copy of the Pharma Insight summary or to set an interview with a Wolters Kluwer Pharma Solutions expert, please contact Tom Kivett at (212) 727-2935 or via email at [tkivett@kivettandco.com](mailto:tkivett@kivettandco.com).*

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