

AHEAD OF WHAT'S NEXT.



Asthma and Allergy Foundation of America

Pseudoephedrine (PSE) Awareness Study – Executive External Report

Methodology

The following research report is based on the following research:

- **Survey Dates:** July 14-26, 2010
- **Respondents:** 2,006 U.S. Adults 18+ who personally suffered from nasal allergies, asthma or cold, cough or flu in the past 12 months and purchased non-prescription medication for at least one condition
- **Margin of Error:** +/- 2.2% in 95 out of 100 cases
- **Weights:** Weighted To the U.S. Adult Population - Propensity

Executive Summary

Knowledge of Patients

- Nearly three quarters of patients surveyed fill a prescription frequently or occasionally. Only 25% say they rarely or never fill a prescription (Rx).
- Those who suffer from asthma and nasal allergies are more frequent shoppers for medications than those who suffer from cold, cough and flu.
- Fifty-six percent of cold, cough and flu sufferers frequently or occasionally buy medications for their cold, cough and flu, compared to more than three-quarters of those who suffer from nasal allergies or asthma.
- Roughly one-half of those surveyed have seen, read or heard something in the news about pseudoephedrine (PSE) over the past year and almost 60% know that it is sold from behind the counter in most states.

Executive Summary

Knowledge of Patients (continued)

- After being read information about pseudoephedrine used in meth labs, 71% said they knew pseudoephedrine is sold behind the counter because of its use in methamphetamine labs.
- Key Points: The target audience of this survey is:
 - Familiar with getting a prescription filled
 - Familiar with buying medications that contain pseudoephedrine
 - Aware that pseudoephedrine medications are sold behind the counter because of their use in methamphetamine labs

Executive Summary

Patient behavior

- When faced with having to buy pseudoephedrine from behind the counter, only 36% say they stop and buy the pseudoephedrine product from behind the counter.
- More than one-half of those surveyed (52%) buy an alternative over the counter medication.

- ***Do the alternatives work?*** Almost 40% of those who buy the alternative say they believe the alternative works as well as the pseudoephedrine drug.

However, the majority are not convinced that the alternative provides the same level of relief as the drugs that use pseudoephedrine as the primary ingredient. Eighteen percent say they do not think the alternatives work as well as the pseudoephedrine drugs and an additional 43% say they are not sure if the alternatives work as well as the pseudoephedrine drugs.

- **Key Point:** When faced with a restriction to buy over the counter pseudoephedrine medications:
 - Most buy an alternative but...
 - Fewer than 40% believe it works as well as the original drug

Executive Summary

Clear Patient Support for Tracking, not Restricting

- **Prescription Requirement:** A requirement for a prescription to purchase pseudoephedrine drugs **is very strongly opposed** by patients.
 - 71% oppose a law that would require a doctor’s prescription to purchase pseudoephedrine drugs.
- **E-Tracking:** Initial support for a law that would set up an e-tracking system **is widely supported** by patients.
 - 66% would support a law that would implement a nationwide e-tracking system to track and monitor the sale of pseudoephedrine drugs.
- **Which do they prefer?** 64% **prefer an e-tracking** law to track and block sales of pseudoephedrine that go over the legal limit **rather than requiring a doctor’s prescription.**

Executive Summary

Regarding “Requiring a Prescription”

- Those who oppose requiring a prescription to buy medications containing pseudoephedrine are more likely to be:
 - Women age 45-54 and, men under age 30
 - Households with three or more children and higher education, higher income
 - Aware of pseudoephedrine being sold behind the counter due to meth lab use

Key Messages Against “Requiring a Prescription”

- **Why do patients oppose Rx?** The messages with the most intensity were those related to cost and convenience combined with a view that the law would be ineffective.
 - Will **increase the cost** of health care broadly and costs of specific medications
 - An **undue burden** on the uninsured and on law abiding citizens
 - Rx **will not stop use** (once a criminal had a prescription, they could use it many times)

Executive Summary

Regarding “E-Tracking”

- Though support was widespread, higher support came from the following groups:
 - Women age 55+
 - Women with children
- Only 29% opposed E-tracking in the initial test, they were disproportionately:
 - Men age 30-54
 - Minority and white men
 - Men without children
 - Higher income
 - Single men

Executive Summary

Key Messages for “E-Tracking”

- ***Why do supporters support e-tracking?*** The messages with the most intensity were those that focused on effectiveness and convenience.
 - E-tracking **has been implemented in 10 states effectively**
 - It is **more effective and less burdensome**, doesn't infringe on law abiding citizens
 - Builds on **existing framework and law enforcement** can be updated in real time
 - Patient **privacy will be protected**
- ***Why are a minority are concerned about e-tracking?*** The arguments with the most intensity were related to cost and somewhat to privacy.
 - Will cost taxpayers millions of dollars
 - Might be an invasion of privacy

Executive Summary

Which policy proposal do patients prefer?

- When asked which policy proposal they preferred: Requiring a Prescription OR implementing E-tracking, **E-tracking was overwhelmingly more popular.**
- **Key Points:**
 - There is a strong and broad coalition of support for E-tracking.
 - Strongest messages focus on effectiveness and the very limited burden E-tracking puts on law abiding citizens.
 - Opposition is primarily focused on cost and privacy.

Executive Summary

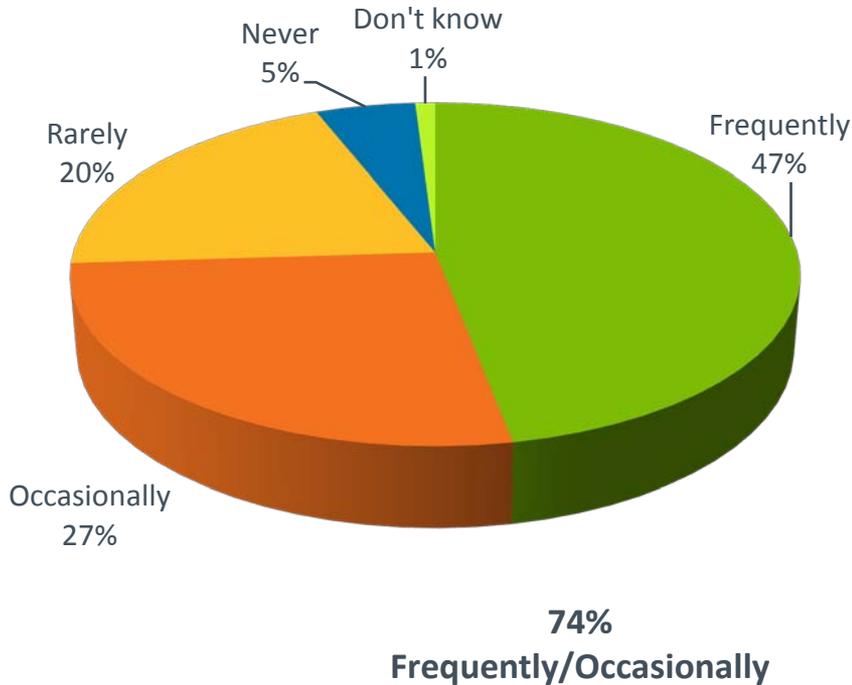
Implications for AAFA:

- **Broad based support for E-tracking** exists, without any communications effort or coalition building.
 - Opposition for this policy is based on cost and privacy/protecting health records.
 - Both of the strongest arguments against have clear and convincing messages that appeal to target audiences.
- Requiring a prescription for medications with pseudoephedrine has **broad opposition**.
 - None of the arguments presented moved our audience to support a prescription requirement for medications containing pseudoephedrine.
 - An attempt to move people to support the prescription requirement would be difficult.

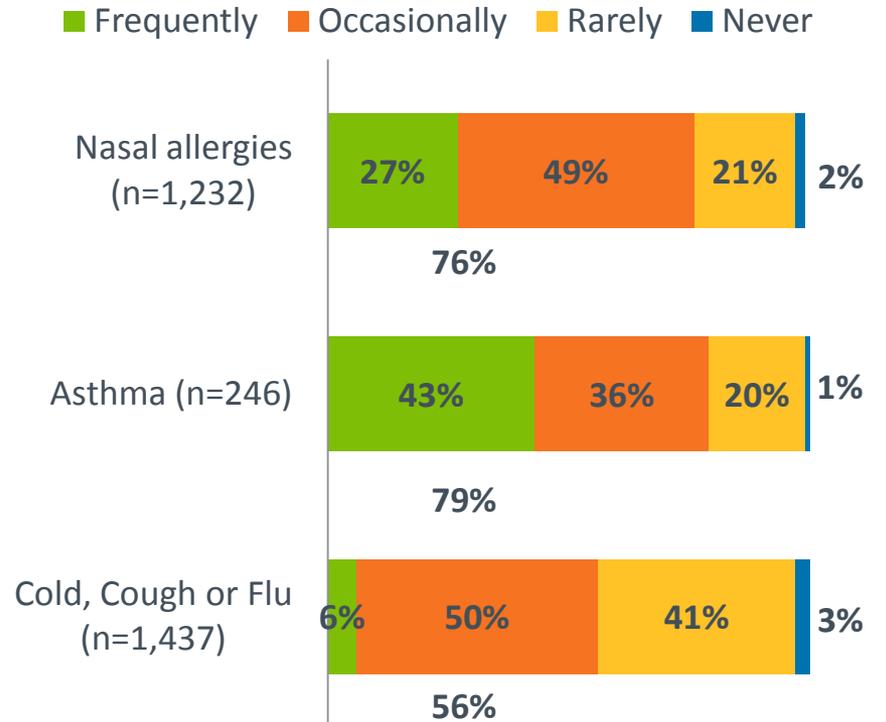
Level of Prescription & Over The Counter Medication Usage

Almost three-quarters of the patients fill prescriptions at least occasionally.

How Often Fill Prescriptions



How Often Buy Medications For...



Base: 2,006 Q1: How often do you have prescriptions filled either for yourself or someone in your immediate family? Q2: Similarly, please indicate how frequently you purchased medications (prescription or non-prescription) for each of the following over the past 12 months.

Awareness of Pseudoephedrine News

Half of respondents have seen, read or heard about pseudoephedrine (PSE) and more than one-third of those who have heard about it are aware that it is used to make illegal drugs.

Seen, Read, Heard News About Pseudoephedrine



What Have You Heard?



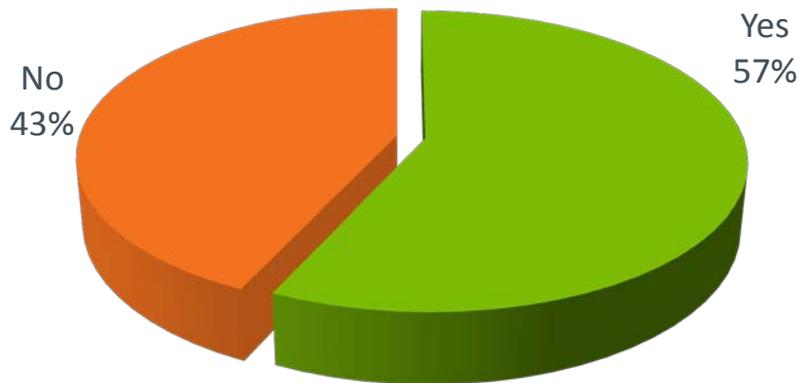
Base: 2,006 Q3: Have you seen, read or heard anything about pseudoephedrine over the past 12 months?

Base: 949 Q4: Please describe what you saw, read or heard about pseudoephedrine.

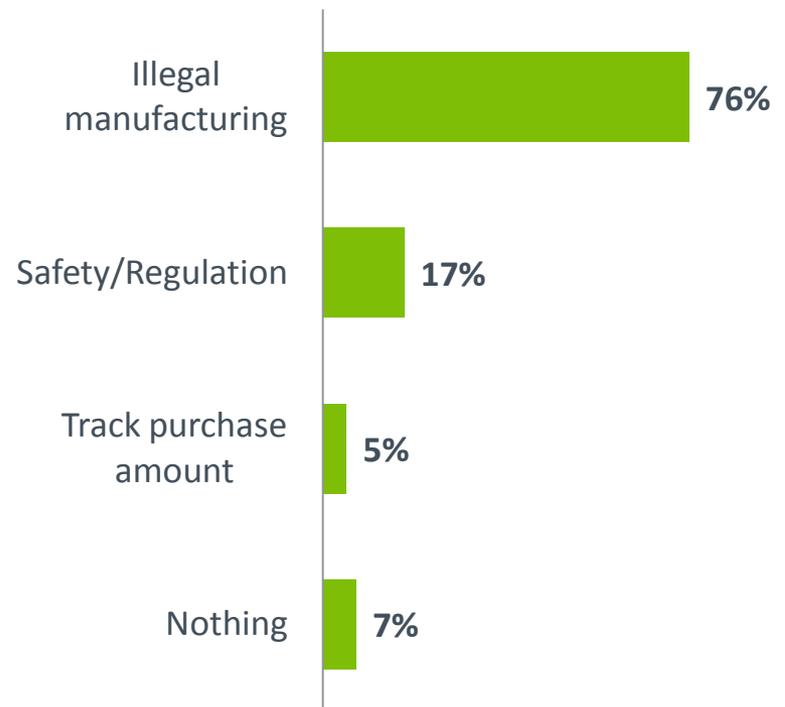
Awareness of Pseudoephedrine Being Sold Behind the Counter

More than one-half are aware the pseudoephedrine is being sold behind the counter.

Aware That Pseudoephedrine Sold Behind the Counter in All But 2 States



Why Sold Behind the Counter?

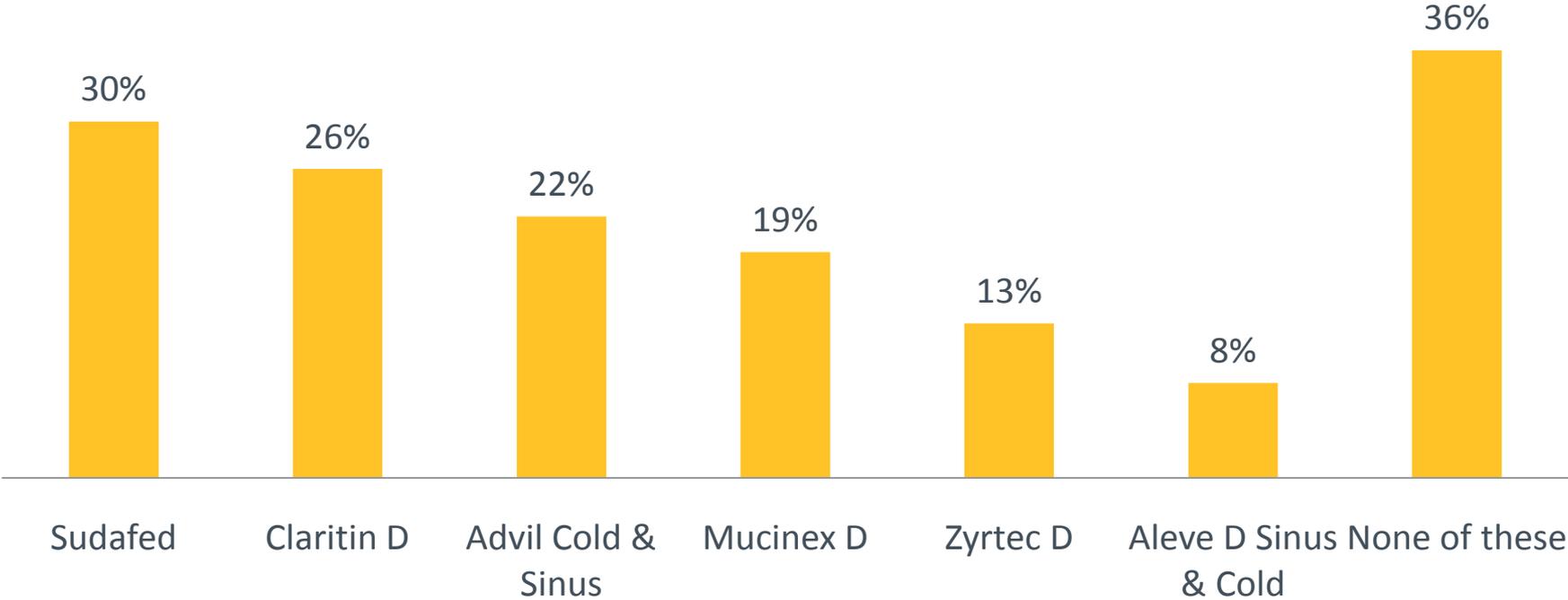


Base: 2,006 Q5: Are you aware that in all but two states, Oregon and Mississippi, medications containing pseudoephedrine are sold behind the counter even though they do not require a prescription?

Base: 1,146 Q6: To the best of your knowledge, please explain why medications containing pseudoephedrine are sold behind the counter even though they do not require a prescription? If you do not know, please type NA and continue.

Pseudoephedrine Medications Purchased

Respondents reported a wide variety of pseudoephedrine use.



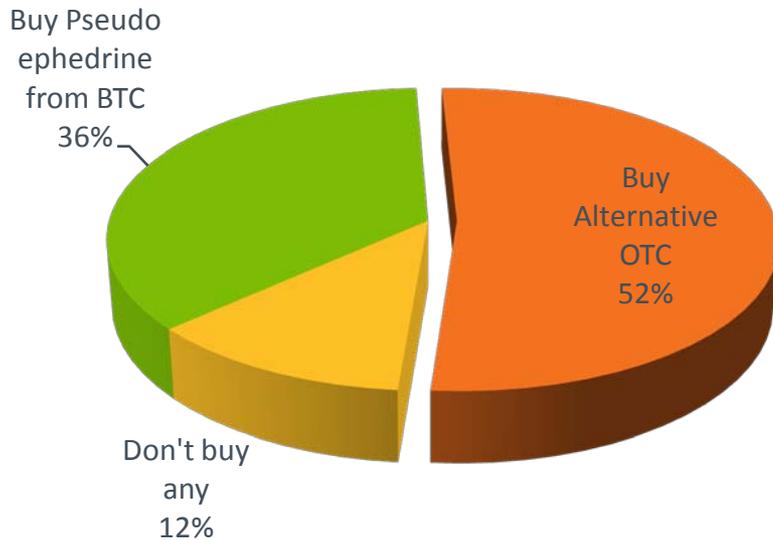
Base: 2,006

Q7: Each of the following medications contains pseudoephedrine. Please indicate if you have purchased any of the following medications within the past 12 months. Please select all that apply.

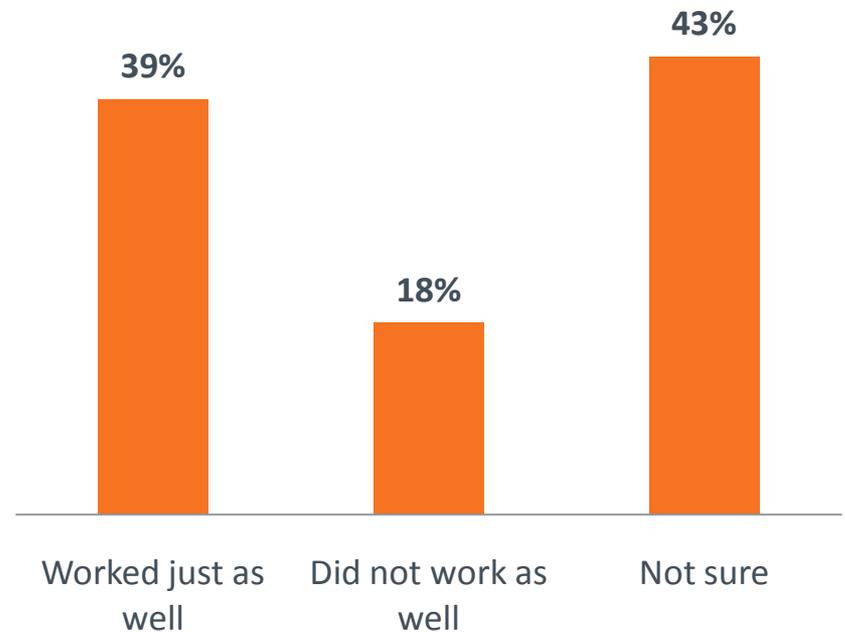
Alternative Decongestants

Most buy an alternative when pseudoephedrine is behind the counter. Only 39% who buy alternatives say they think alternatives work as well as medications with pseudoephedrine.

Buy Pseudoephedrine or Alternative



Effectiveness of OTC Alternatives



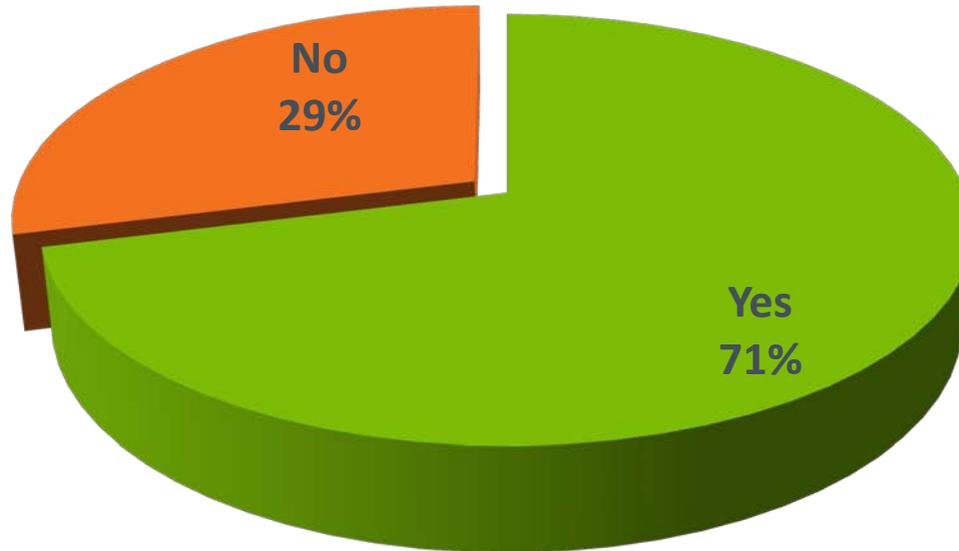
Base: 2,006 Q8: When you need to purchase medicine that treats congestion (a decongestant), do you typically purchase the decongestant with pseudoephedrine or do you typically purchase an over-the-counter alternative product that does not contain pseudoephedrine that is available with the other non-prescription medications?

Base: 1,064 Q9: When you purchase an alternative over the counter decongestant that does not contain pseudoephedrine, would you say the alternative worked as well as the decongestants with pseudoephedrine purchased from behind the counter and with a signature?

Aware of Meth Lab Role in Moving Medications BTC

Awareness of the use of pseudoephedrine in the production of methamphetamine is high.

Aware the pseudoephedrine use in meth labs reason for moving BTC



Base: 2,006

Q10: Were you aware that pseudoephedrine use in meth labs was the reason for moving these medications behind the counter?

Prescription Mandate Opinion Summary

- Seven in ten **(71%) respondents oppose the proposed pseudoephedrine Rx mandate** law initially, while just one-quarter (24%) support it. Half (48%) are strongly opposed.
 - Respondents aware of pseudoephedrine use in meth labs and who have purchased medications with pseudoephedrine are more likely to be opposed, while those are not aware of its use or have not purchased medications are more likely to support the law.
- After arguments on both sides of the issue, two-thirds (66%) are pure opponents, that is, they oppose the law initially and after hearing the arguments, while just 15% are pure supporters.
- One in five (19%) either change their minds over the course of the survey or are undecided at the beginning and end of the survey on the prescription mandate law.

E-Tracking Opinion Summary

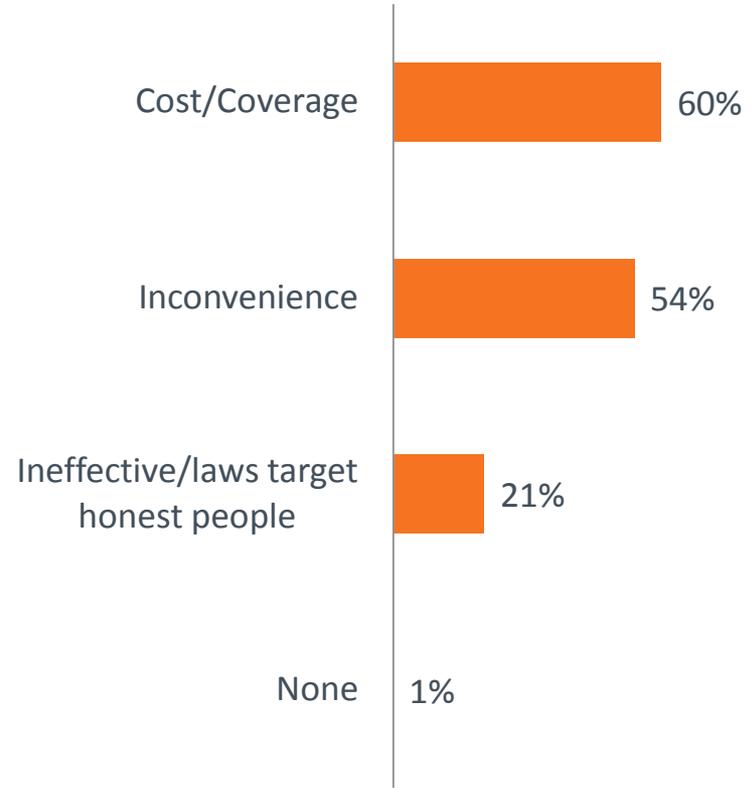
- A full two-thirds (**66%**) support a proposed nationwide E-tracking law initially, including one-third (33%) who strongly support it.
- Only three in ten (29%) respondents oppose the proposed nationwide E-tracking law.
- A majority (58%) are pure supporters of E-tracking and one in five (21%) are pure opponents.
- One in five (21%) either change their minds over the course of the survey or are undecided both at the beginning and end of the survey on E-tracking.

Reasons for Support/Opposition – Prescription Requirement

Supporters (n=359)



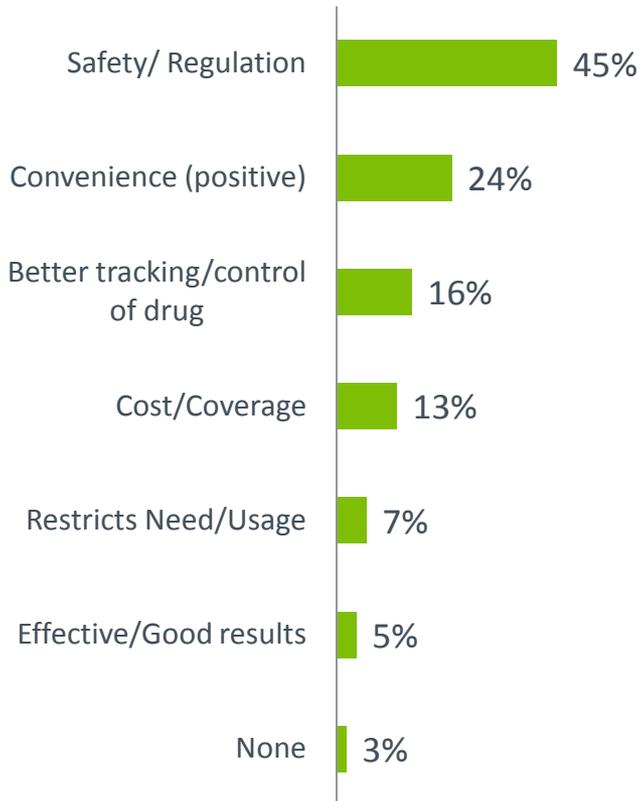
Opponents (n=1,537)



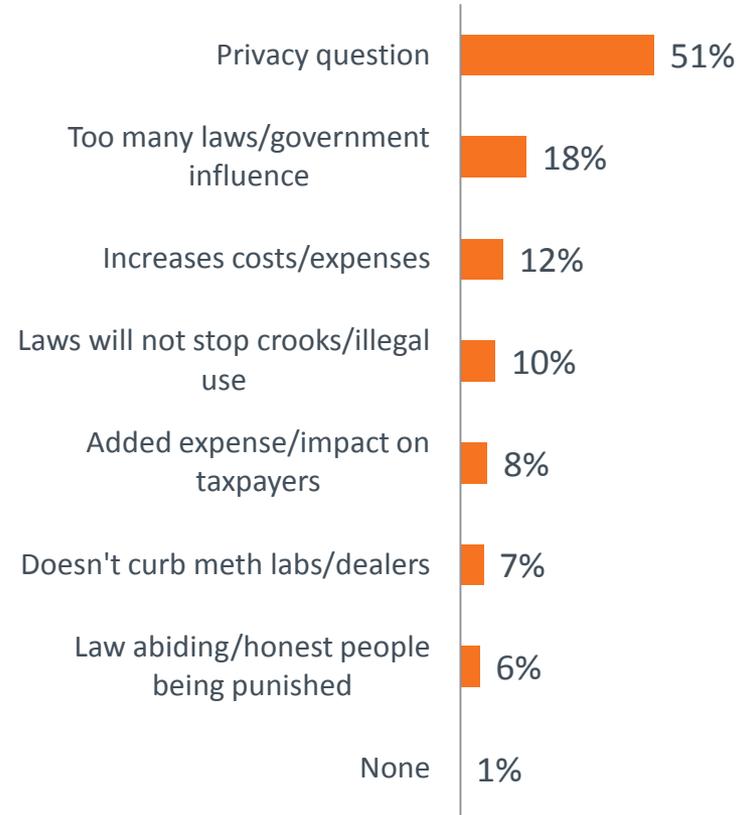
Base: Varies Q45: Please indicate the primary reason why you [INSERT RESPONSE FROM Q44] the proposed law that would require everyone who wants to purchase a decongestant containing the drug pseudoephedrine to first get a prescription from their doctor.

Reasons for Support/Opposition – E-Tracking

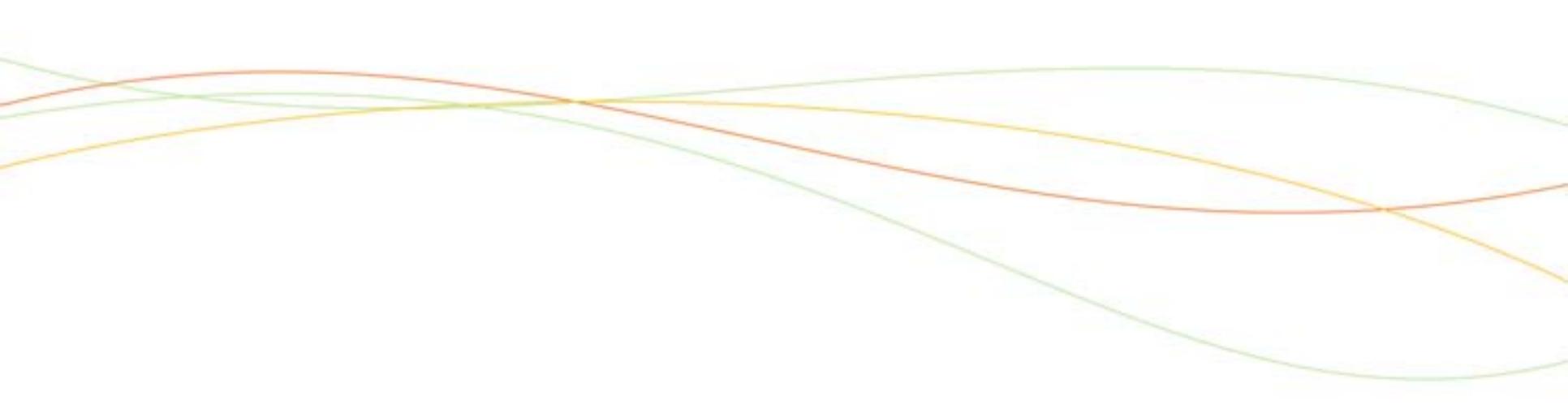
Supporters (n=1,288)



Opponents (n=582)

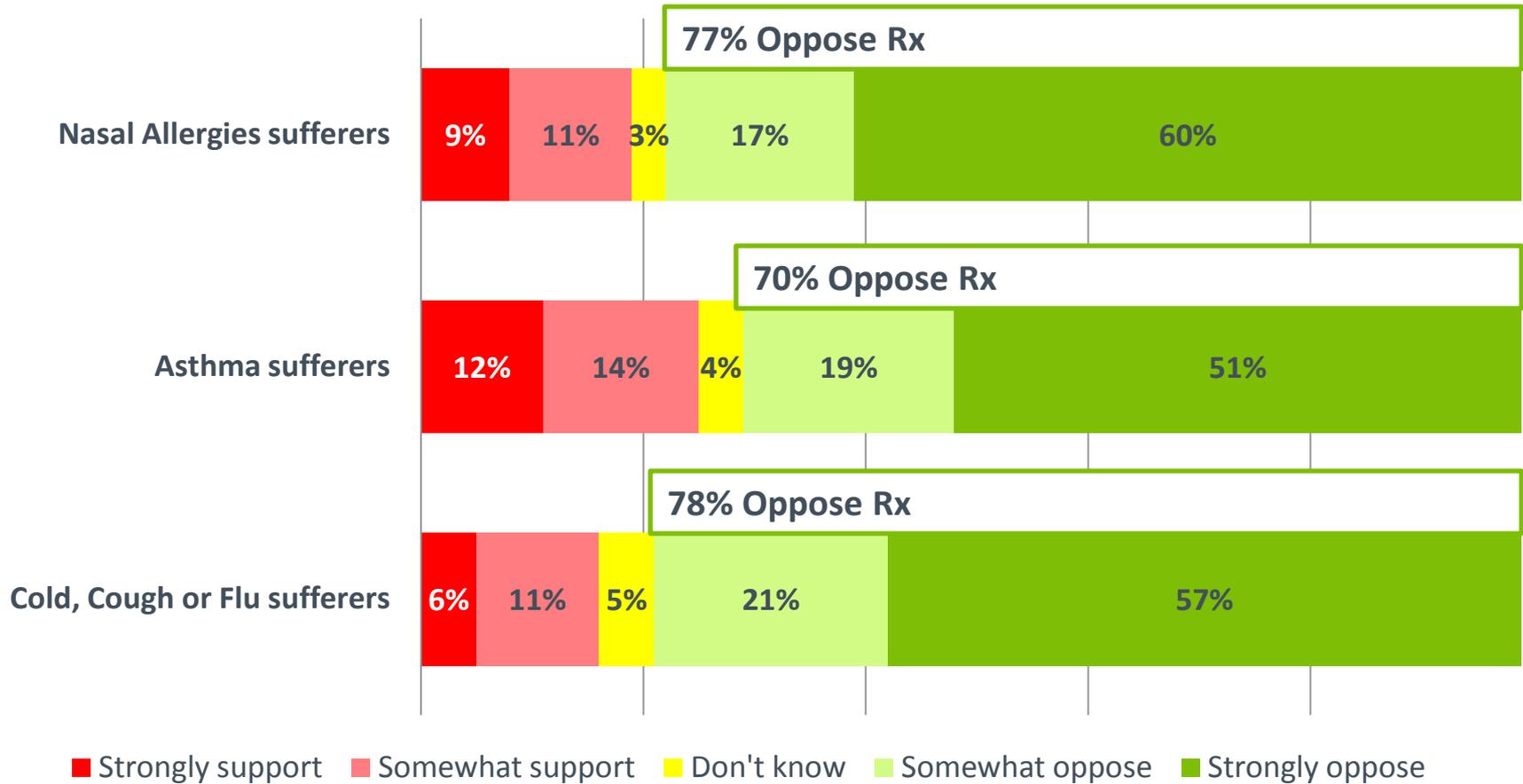


Base: Varies Q47: Please indicate the primary reason why you [INSERT RESPONSE FROM Q46] the proposed law that would implement a nationwide electronic tracking system.



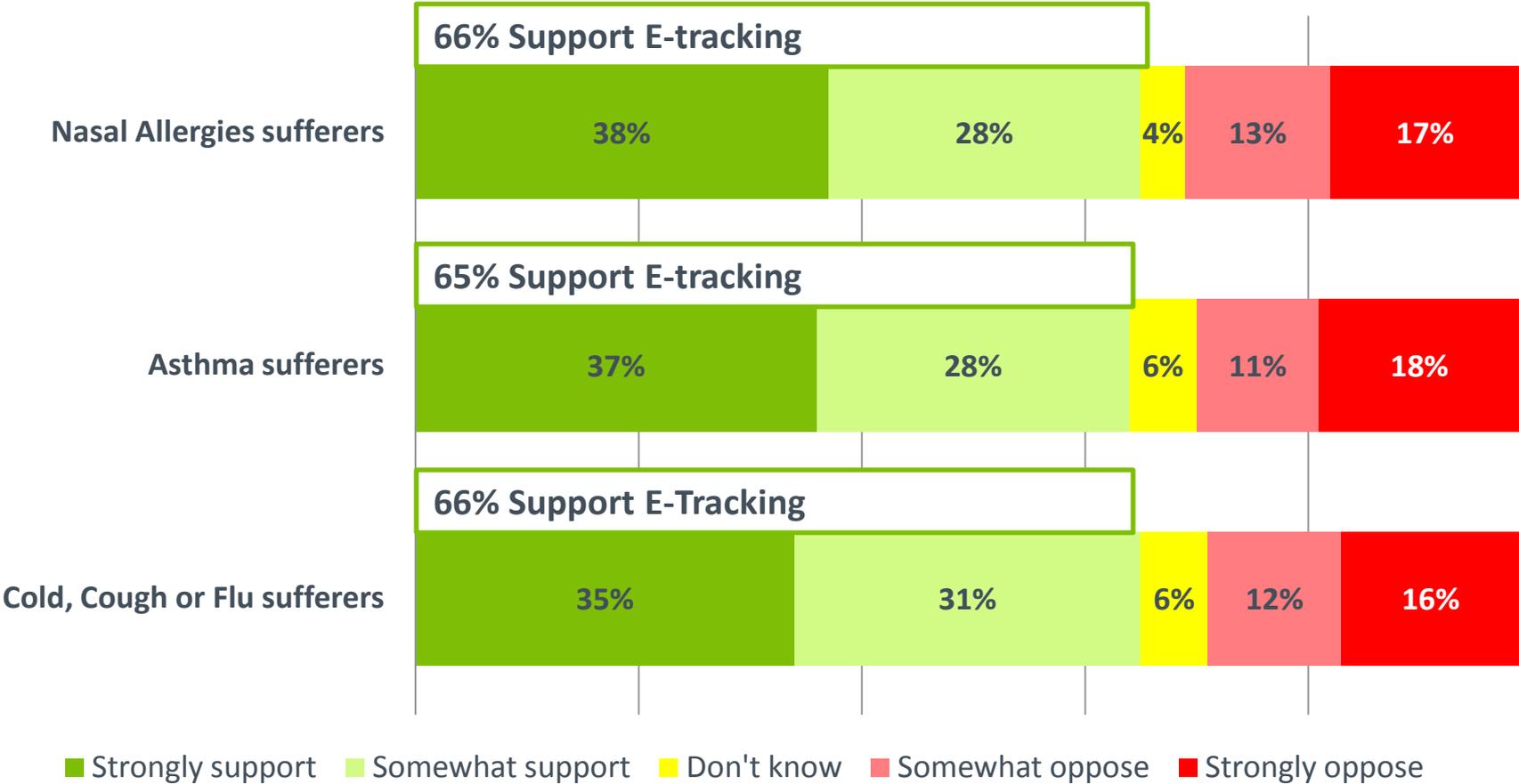
Cross Tabs: Asthma/Allergy Patient-Specific Data

Post-Message Support/Opposition for prescription requirement by Illness Requiring Medication



Base: Nasal Allergy sufferers (n=1,309), Asthma sufferers (n=255), Cold, cough or flu sufferers (n=1,534) Q44: Please indicate your support or opposition to a proposed law that would require everyone who wants to purchase a decongestant containing pseudoephedrine to first get a prescription from a doctor.

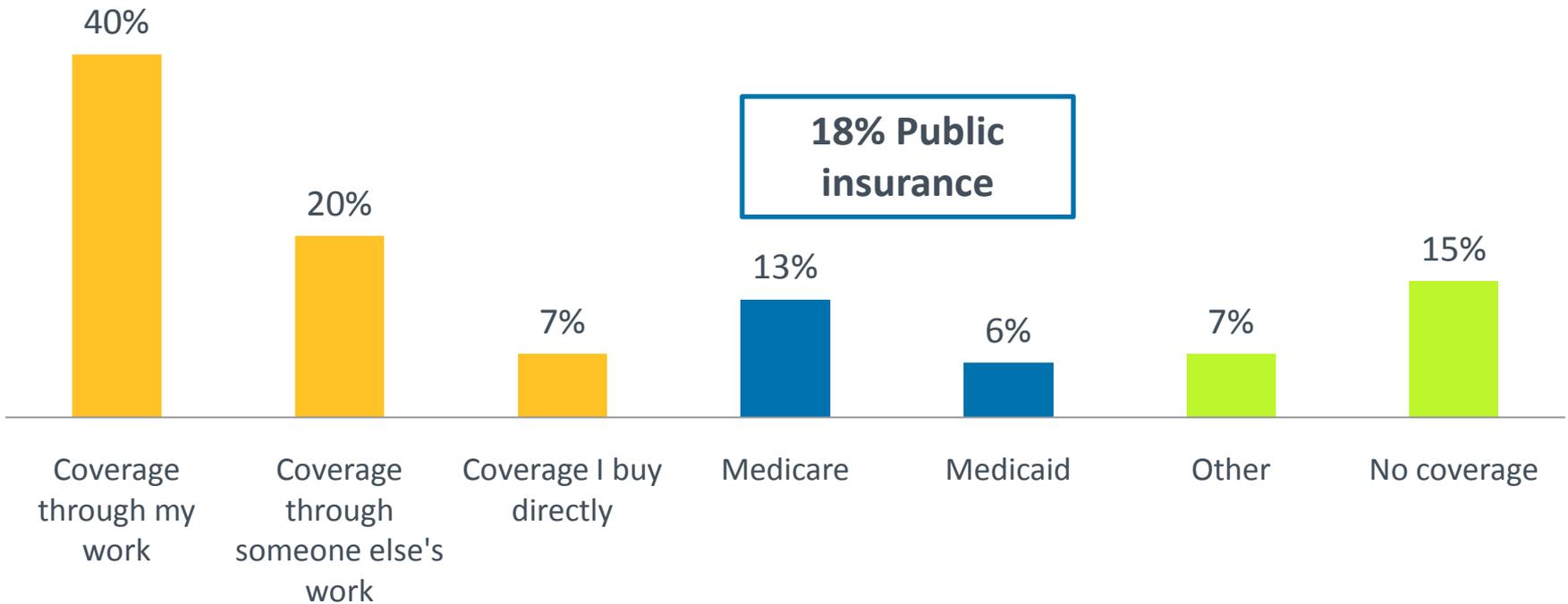
Post-Message Support/Opposition for E-Tracking by Illness Requiring Medication



Base: Nasal Allergy sufferers (n=1,309), Asthma sufferers (n=255), Cold, cough or flu sufferers (n=1,534) Q46: Please indicate your support or opposition to a proposed law that would implement a nationwide electronic tracking system. Currently, customers must provide identification and sign a log book to buy decongestants with pseudoephedrine.

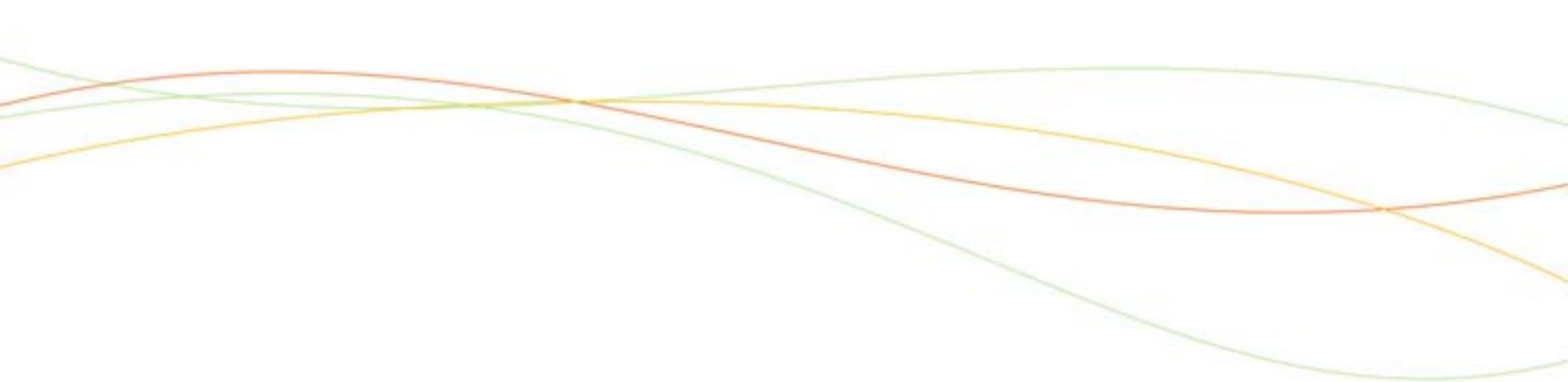
Health Insurance Coverage

65% Private insurance



Base: 2,006

Q50: Which type of health plan or health insurance, if any, do you currently have for yourself? Please select all that apply.



Demographic Profile

Demographic Profile

Gender N=2,006

Male	43%
Female	57%

Age

18-34	32%
35-49	33%
50-64	24%
65+	11%

Region

East	20%
Midwest	24%
South	31%
West	24%

Marital Status

Never married	34%
Married/civil union	42%
Divorced	9%
Separated	2%
Widowed	4%
Living w/partner	9%

Adults in HH

One	21%
Two	48%
Three	20%
Four or more	11%

Children in Household N=2,006

None	76%
Children in HH (NET)	24%
One	12%
Two	9%
Three	2%
Four	1%
Five or more	1%

Employment Status

Employed (NET)	63%
Full-time	46%
Part-time	23%
Self-employed	12%
Not employed (NET)	37%
Looking for work	12%
Not looking for work	18%
Unable to work	7%
Retired	15%
Student	18%
Homemaker	10%

Education

High school or less	42%
Some college	31%
College graduate	22%
Post graduate	6%

Income N=2,006

< \$15,000	7%
\$15,000-\$24,000	7%
\$25,000-\$34,999	9%
\$35,000-\$49,999	12%
\$50,000-\$74,999	19%
\$75,000-\$99,999	12%
\$100,000-\$124,999	9%
\$125,000-\$149,999	5%
\$150,000-\$199,999	3%
\$200,000-\$249,999	2%
\$250,000 or more	1%
Decline to answer	15%

Race/Ethnicity

White	72%
Black/African-American	9%
Asian or Pacific Islander	2%
Native American	*
Hispanic	13%
Mixed racial background	1%
Other race	*
Decline to answer	2%