Inside HCP Decision-Making

As Cost Sensitivity Grows, New Opportunities Emerge

HCPs have strong opinions about access

We surveyed 100 actively practicing healthcare providers across multiple levels and specialties about

- Market access
- Patient access
- Sales rep interactions
- Using EHR platforms
- Patient support programs

23.6
average years in practice

114.42
average patients seen per week

5.09
average pharma reps seen per week

Key themes

HCPs feel new urgency around meeting patient cost concerns. The roles cost and coverage play in prescribing decisions rose dramatically since last year's survey.

"A drug is useless if the patient cannot afford it."

HCPs are hungry for head-to-head cost comparisons – and want to hear them from their reps.

*"When patients have competing drug costs, it's helpful to know the cost burden of each drug to prioritize therapy."*

HCPs want a heads up about your drug's access challenges, and they want your PA guidance in their EHR.

"When I see the patient, I would like to see cost and coverage information show up in my EHR as a comparison popup especially if I should anticipate coverage hurdles."

How important is knowing a patient's prescription drug coverage information and potential copay in your prescribing decision?
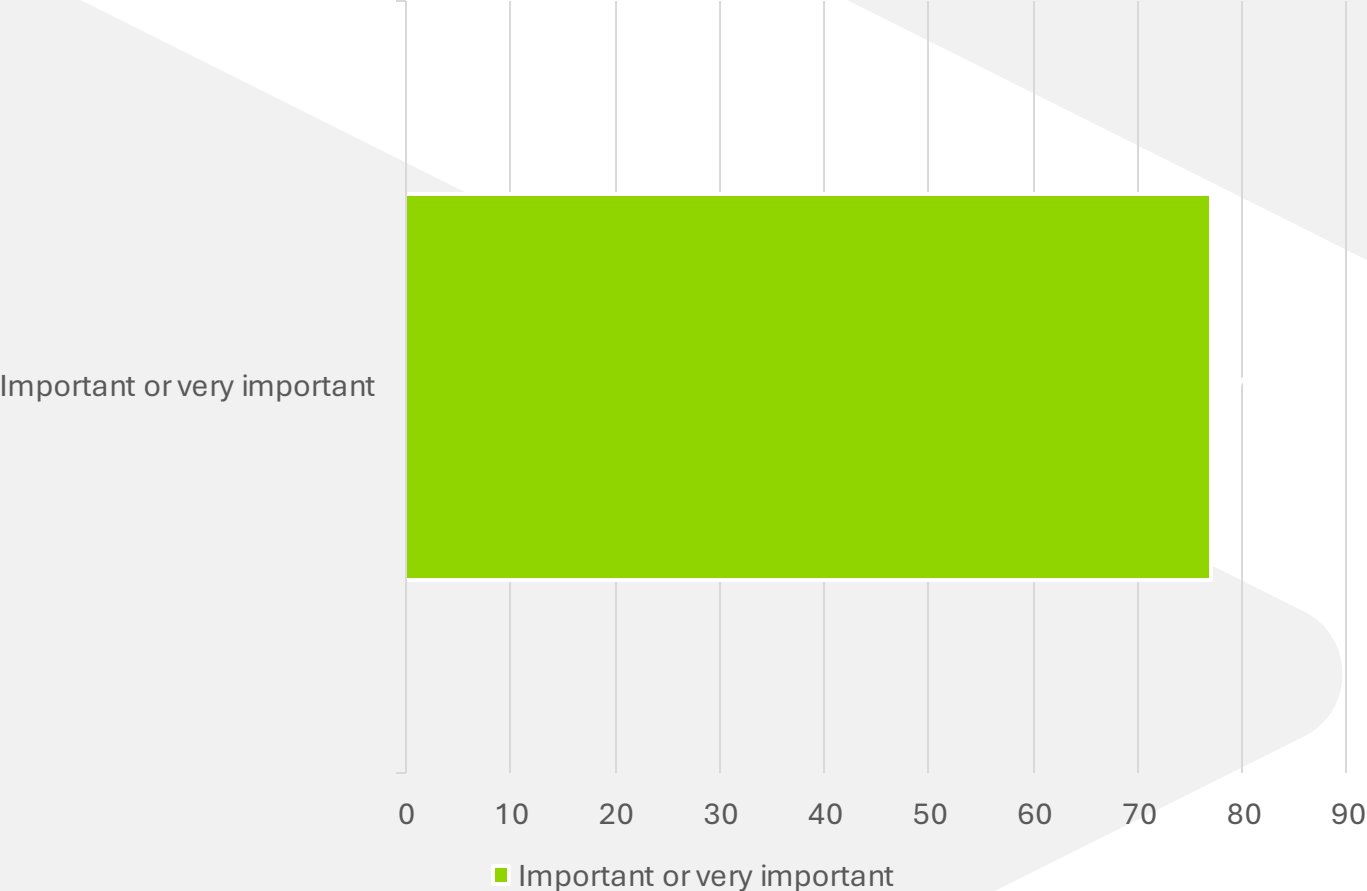
Have you ever made a change in your clinical management because of the patient's insurance coverage?
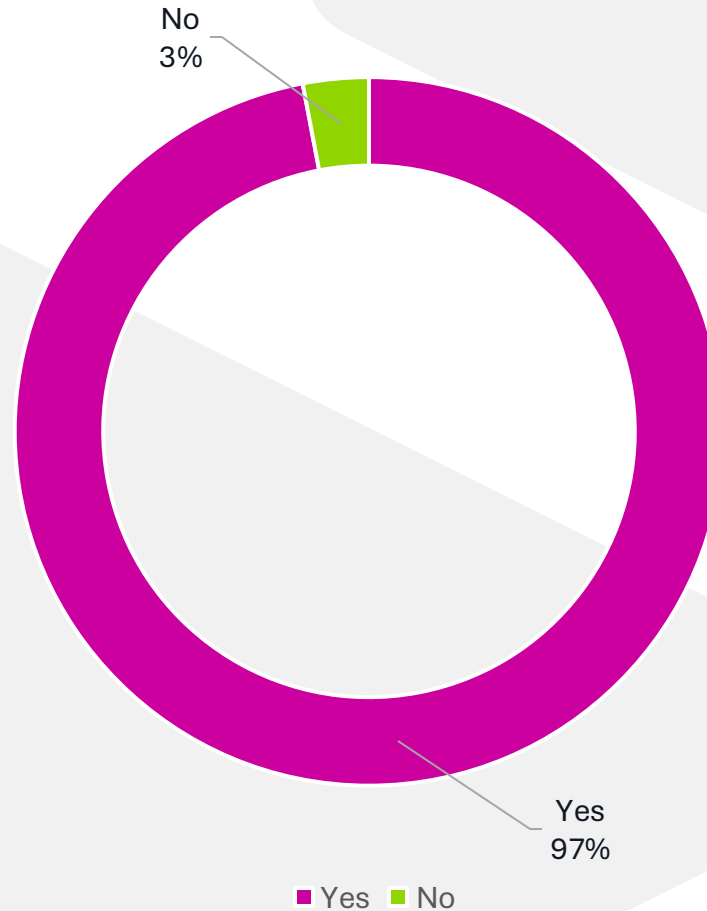
Insight: 97% of HCPs said "Yes," insurance influences

No
3%

Yes
97%

■ Yes ■ No

How important is it to understand prescription coverage information about healthcare plans you specifically see in your practice, versus the top healthcare plans by lives in your general geography?
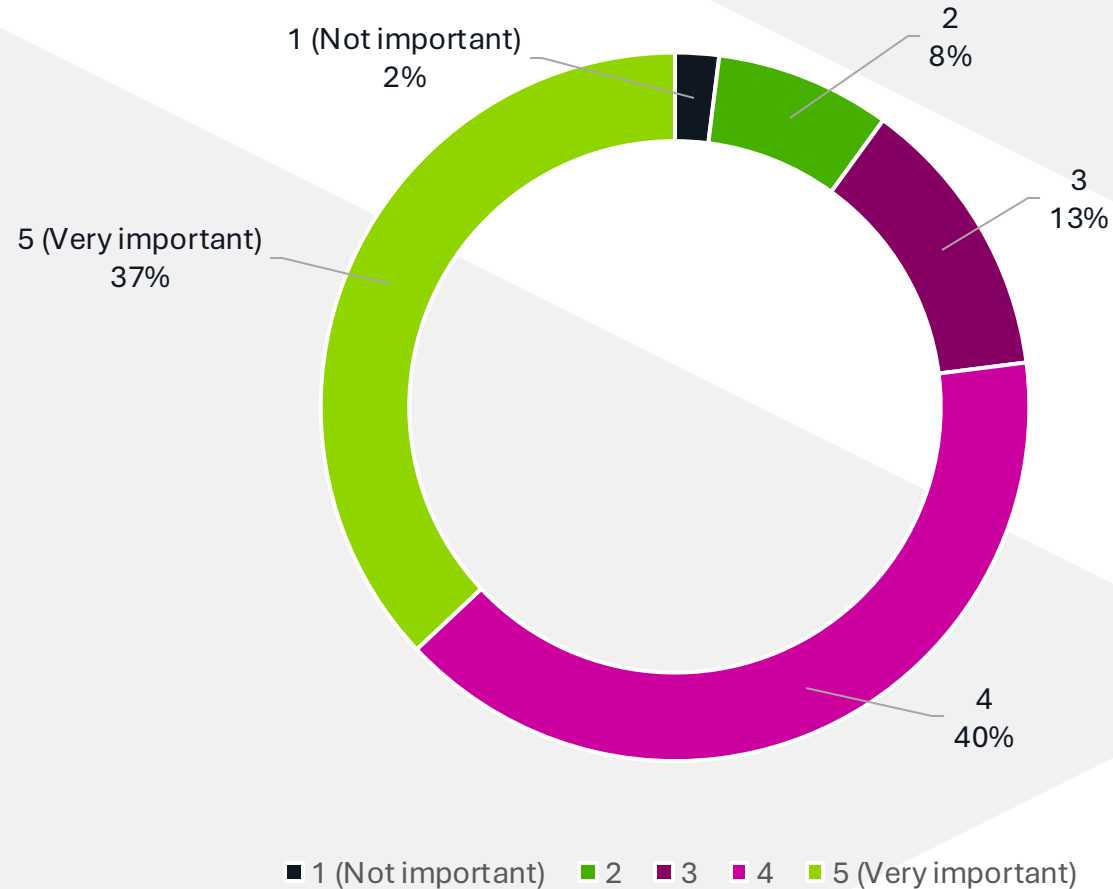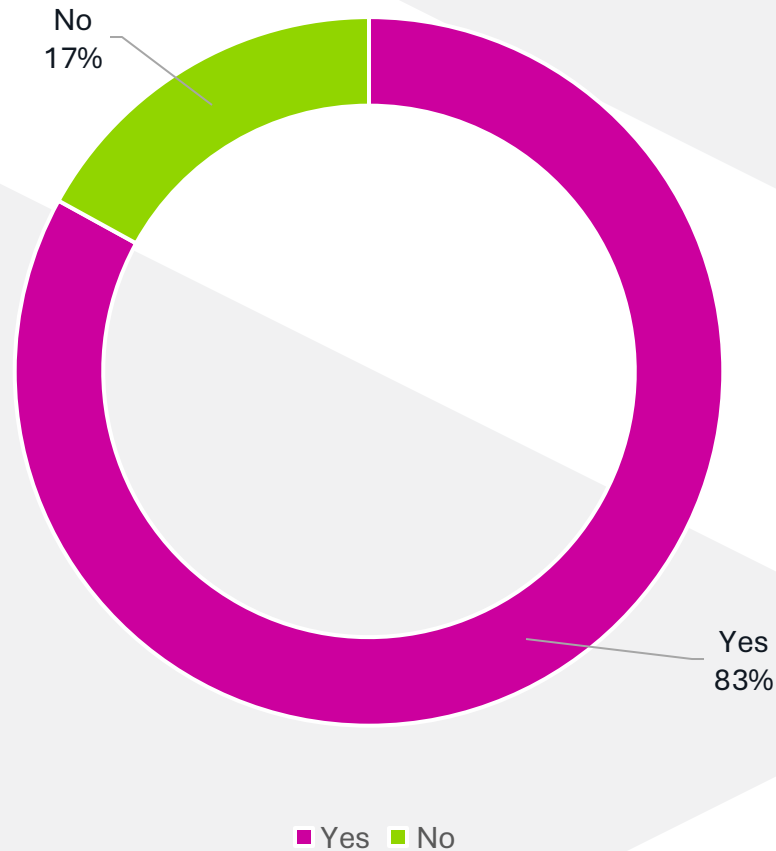
Insight: 77% of HCPs said this is important or very important

1 (Not important)
2%

2
8%

3
13%

4
40%

5 (Very important)
37%

■ 1 (Not important) ■ 2 ■ 3 ■ 4 ■ 5 (Very important)

Do you find pharmaceutical sales representatives to be a credible source when relaying healthcare plan prescription drug coverage information?
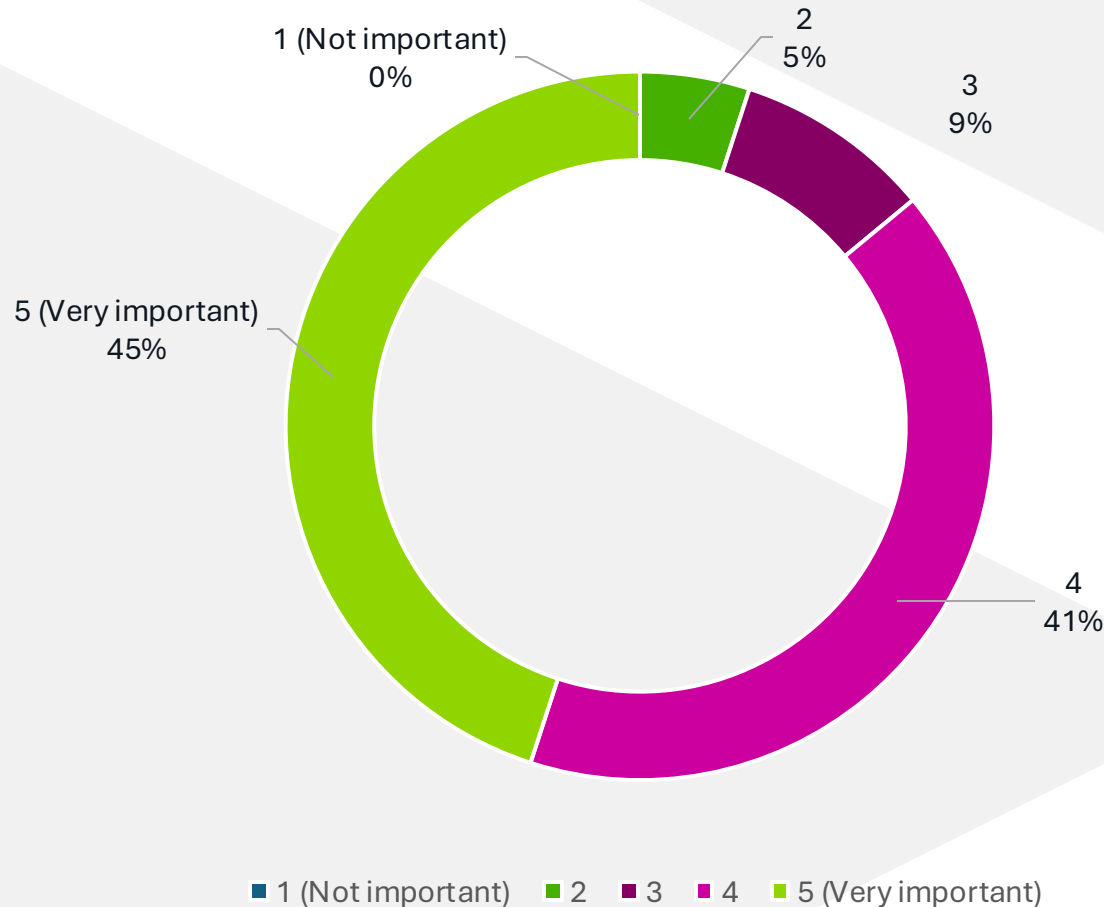
Insight: 83% of HCPs find Reps a credible source

No
17%

Yes
83%

■ Yes ■ No

When meeting with a pharmaceutical sales representative, how important is it that they share information about the cost and coverage of their drug during the sales interaction?

Insight: 86% of HCPs reported it is important, very important to hear about a drug's cost & coverage

1 (Not important)
0%

2
5%

3
9%

4
41%

5 (Very important)
45%

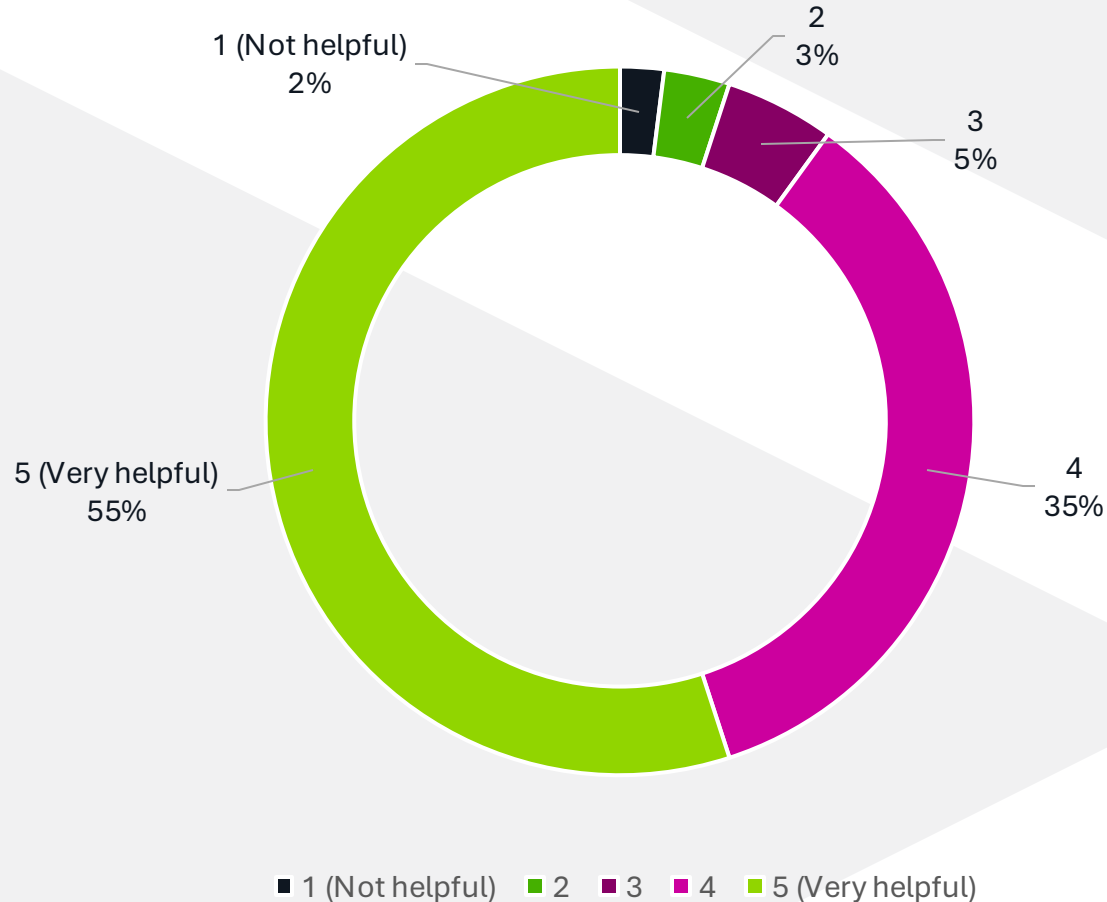Legend: ■ 1 (Not important) ■ 2 ■ 3 ■ 4 ■ 5 (Very important)

If a branded drug required a prior authorization (PA), how helpful would it be to know exactly what the PA required of you before prescribing the drug?

Insight: 90% of HCPs reported it would be helpful/very helpful to learn about Prior Authorizations

1 (Not helpful)
2%

2
3%

3
5%

4
35%

5 (Very helpful)
55%

■ 1 (Not helpful) ■ 2 ■ 3 ■ 4 ■ 5 (Very helpful)

When at least two products in the same therapeutic class are available, how important is understanding patient out-of-pocket prescription costs when you are making a prescribing decision?
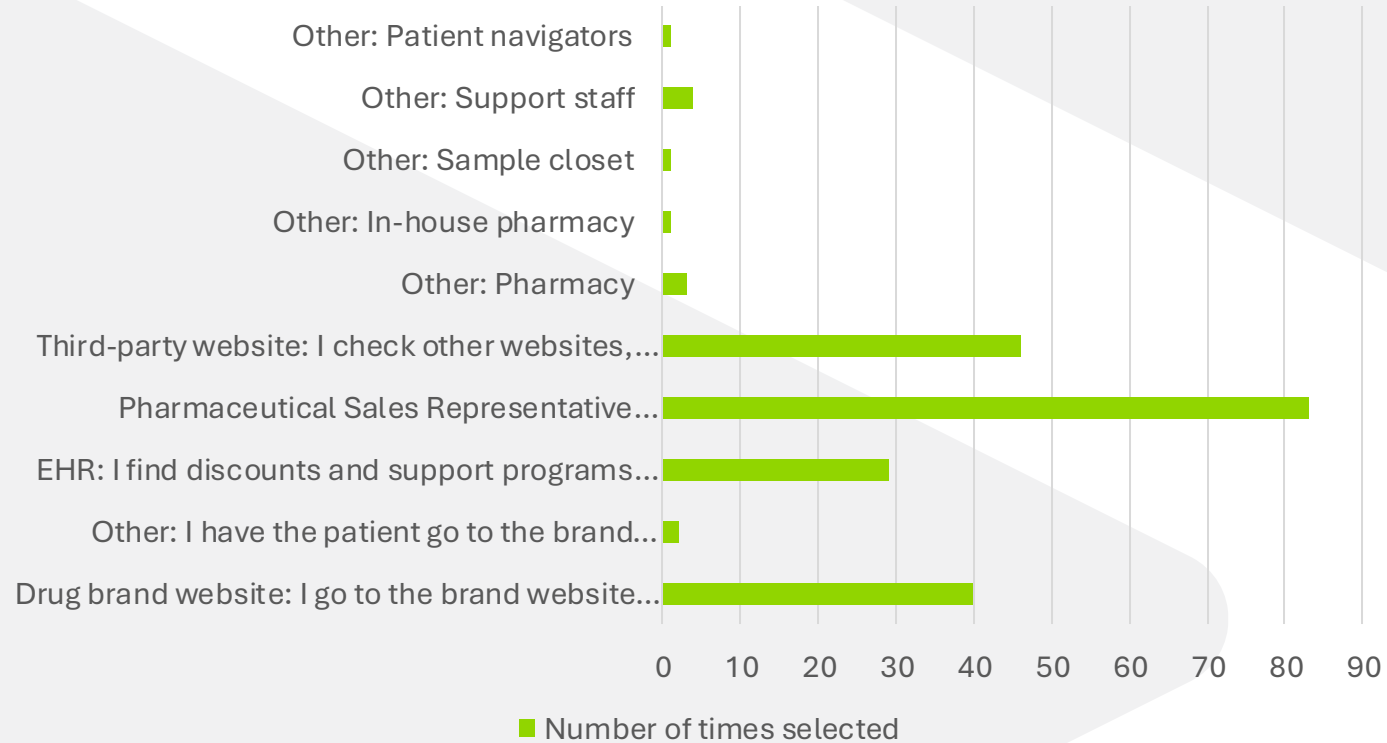
Insight: 83% of HCPs want to know about patient costs when drugs have a competitor

1 (Not important)
0%

2
3%

3
14%

4
36%

5 (Very important)
47%

■ 1 (Not important)   ■ 2   ■ 3   ■ 4   ■ 5 (Very important)
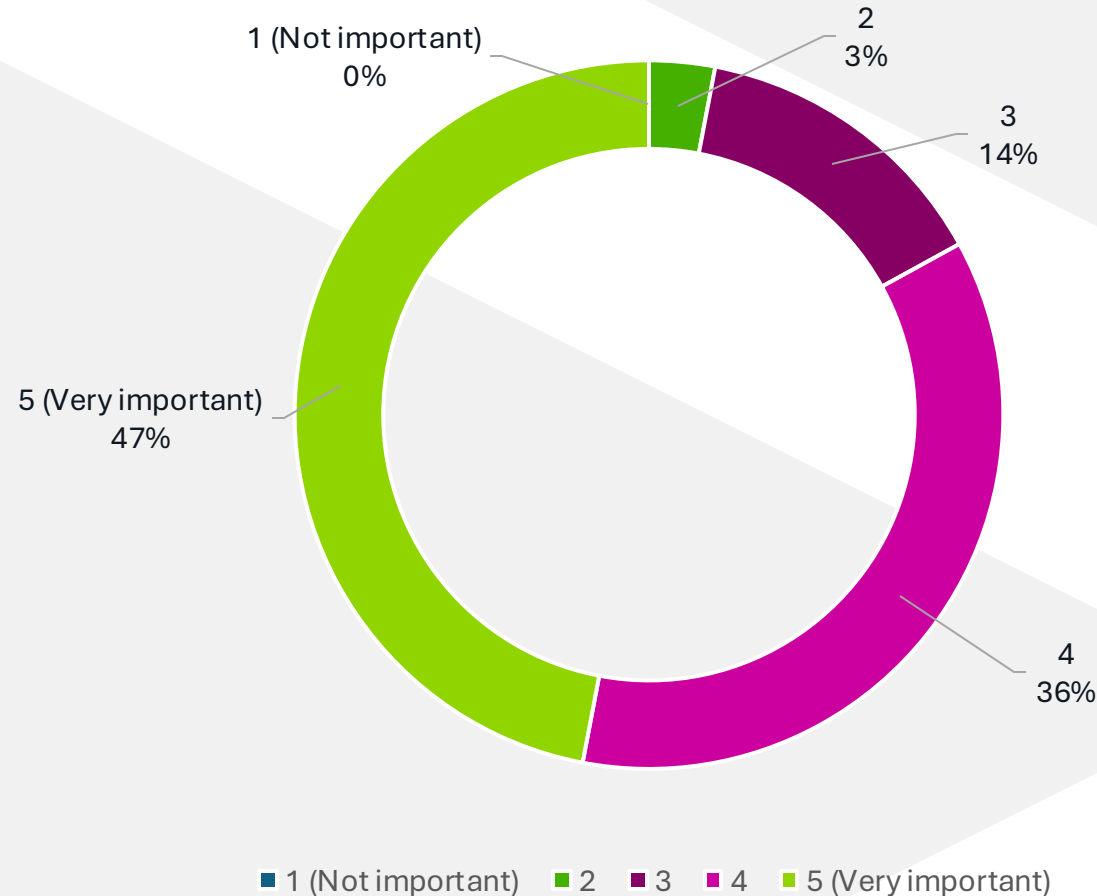
How do you access prescription Brand Savings Cards and prescription drug plan information for your patients? Select all that apply.

Insight: HCPs rely on Rep's and Website for Pull-through Info and Savings Card

Number of times selected

Category	
Other: Patient navigators	
Other: Support staff	
Other: Sample closet	
Other: In-house pharmacy	
Other: Pharmacy	
Third-party website: I check other websites,…	~46
Pharmaceutical Sales Representative…	~83
EHR: I find discounts and support programs…	~29
Other: I have the patient go to the brand…	
Drug brand website: I go to the brand website…	~40

Axis: 0 10 20 30 40 50 60 70 80 90

■ Number of times selected

Would receiving formulary coverage information within your EHR tool be helpful when making a treatment decision?

**Insight: 88% of HCPs want formulary coverage info in their EHR**
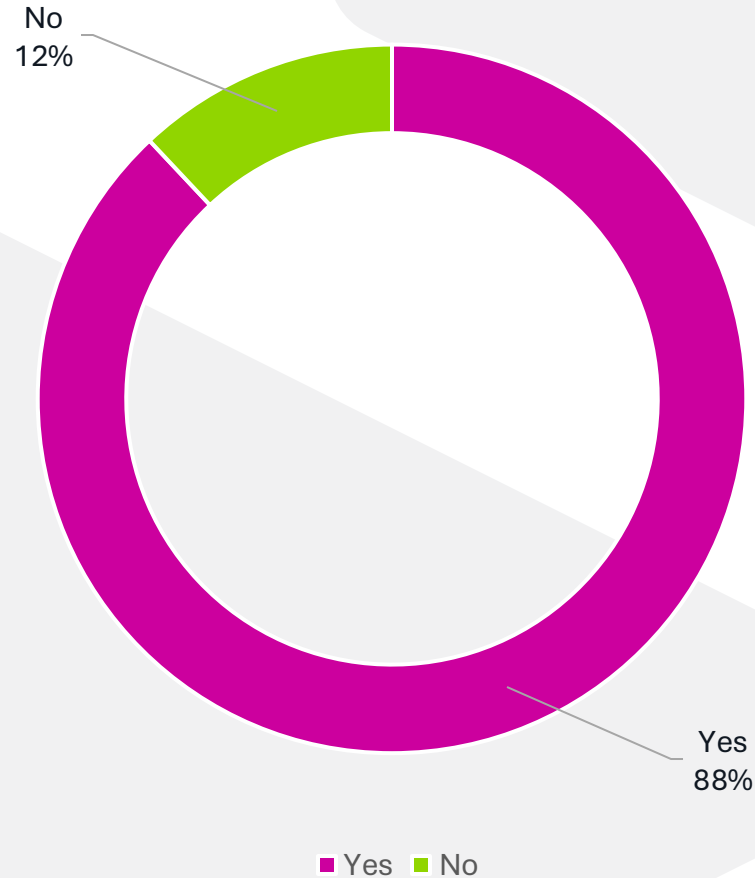
No
12%

Yes
88%

■ Yes ■ No

How open would you be to a Pharmaceutical Sales Representative sharing new, quick ways you can make better use of your EHR portal when prescribing a drug (e.g., increasing efficiency, streamlining workflows)?

Insight: 79% of HCPs would like a Pharma Rep to show them how to optimize their EHR platform

1 (Not open)
4%

2
4%

3
13%

5 (Very open)
46%

4
33%

■ 1 (Not open) ■ 2 ■ 3 ■ 4 ■ 5 (Very open)
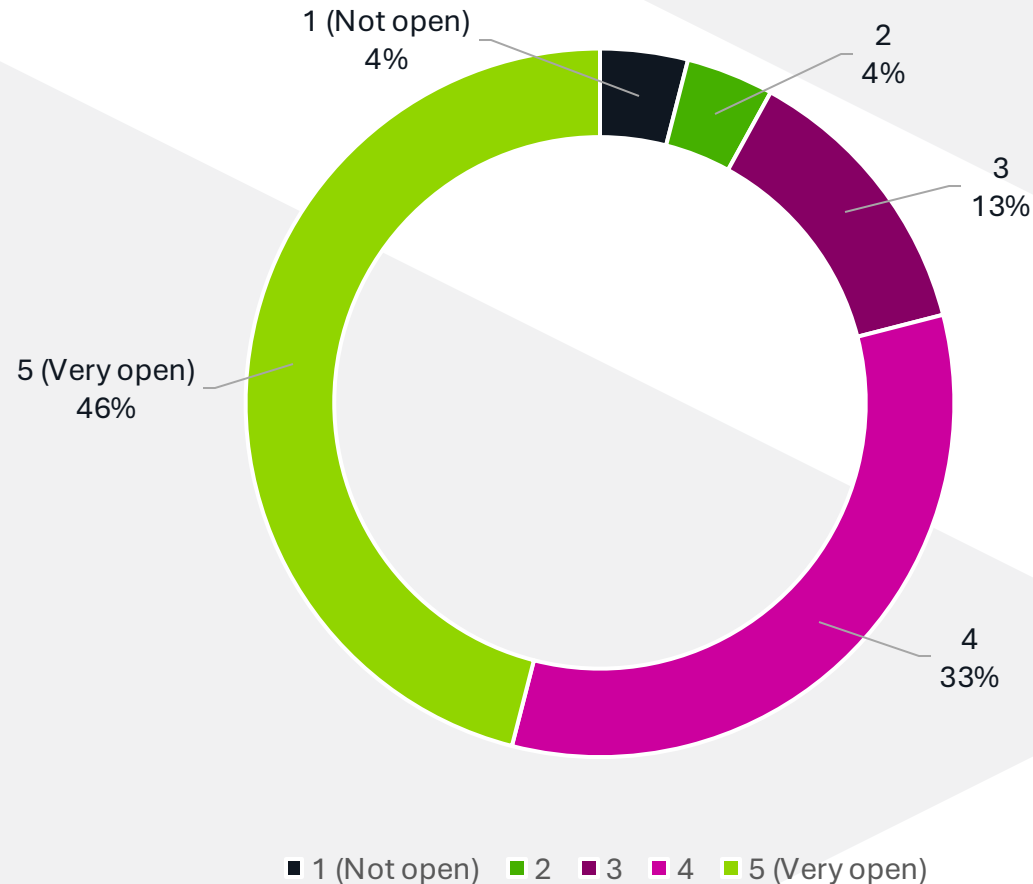
Do head-to-head drug formulary messages shared by a Pharmaceutical Rep help you determine which brand to prescribe (compare the status of 2 brands on one health plan drug formulary)?
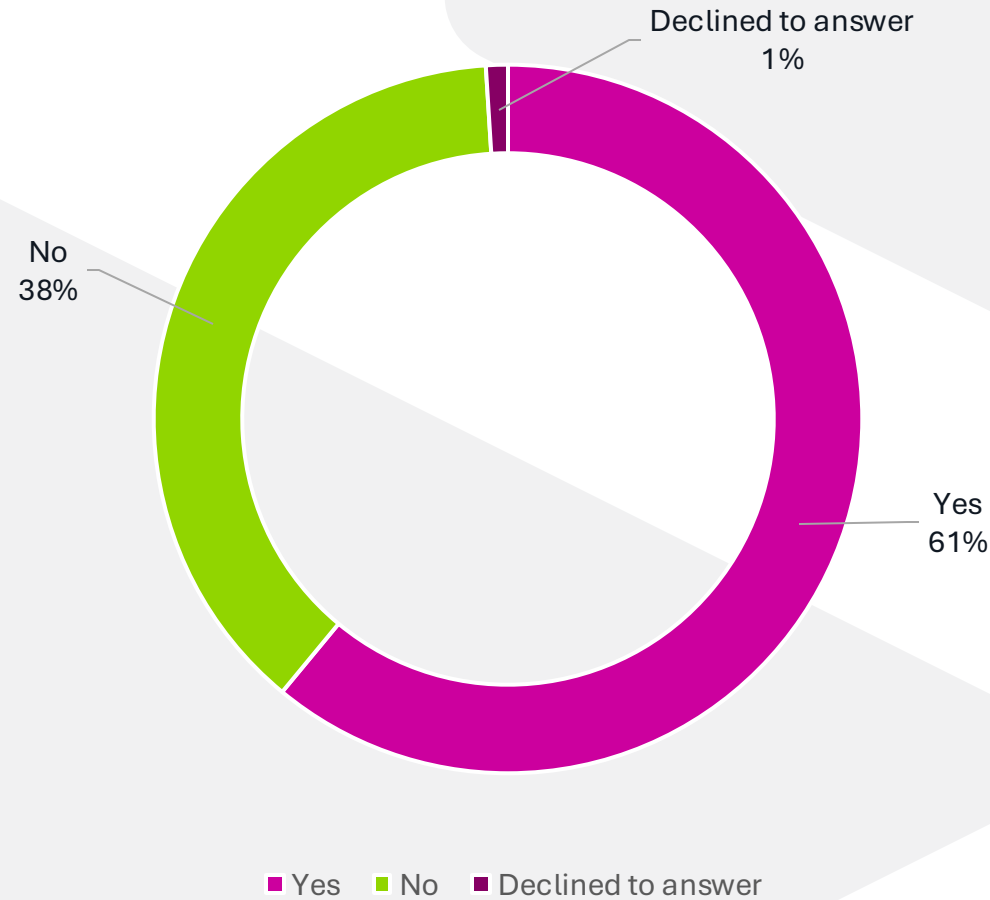
Insight: 67% of HCPs report comparative formulary messages drive Rx decisons

No
33%

Yes
67%

■ Yes ■ No
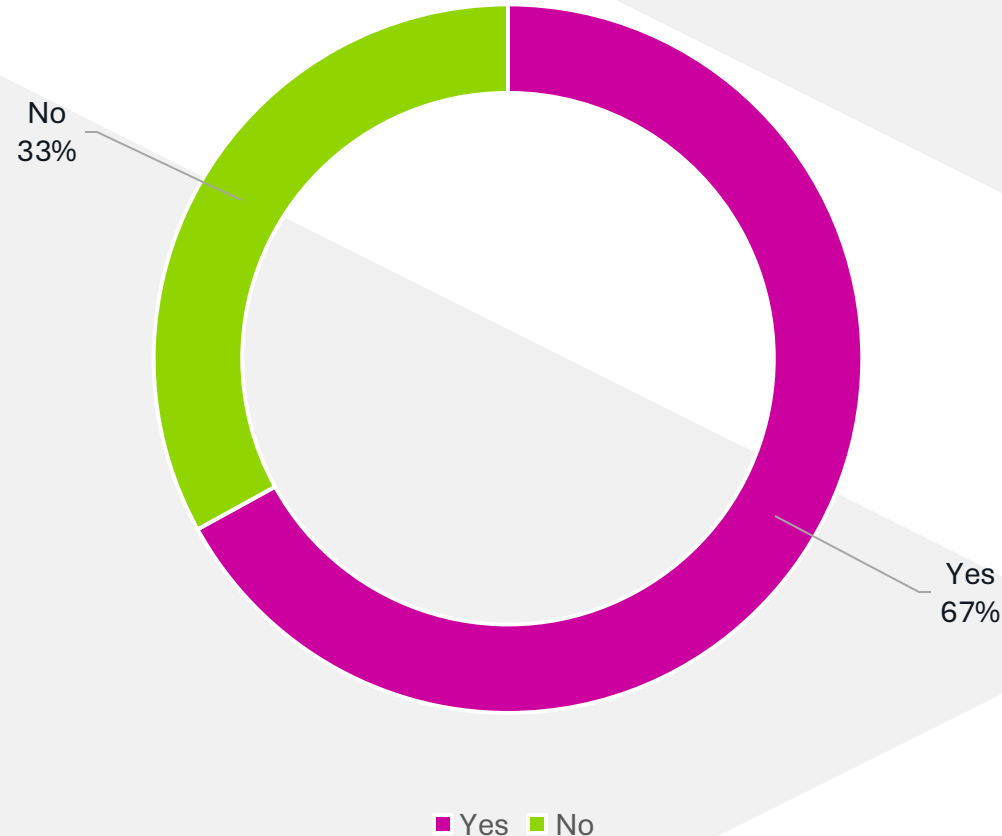
Do you trust head-to-head drug formulary messages from sales professionals?

Insight: 61% of HCPs trust Reps when sharing head to head formulary information

Declined to answer
1%

No
38%

Yes
61%

■ Yes ■ No ■ Declined to answer

How familiar are you accessing and using all the available clinical decision support (CDS) functionality of your EHR (Preferences, Patient Lists, Order Sets, Flowsheets, Macros, etc.)

Insight: 39% of HCPs are familiar with the full functionality of their EHR platforms

5 (Very familiar)
8%

1 (Not very familiar)
15%

2
16%

3
30%

4
31%

■ 1 (Not very familiar) ■ 2 ■ 3 ■ 4 ■ 5 (Very familiar)
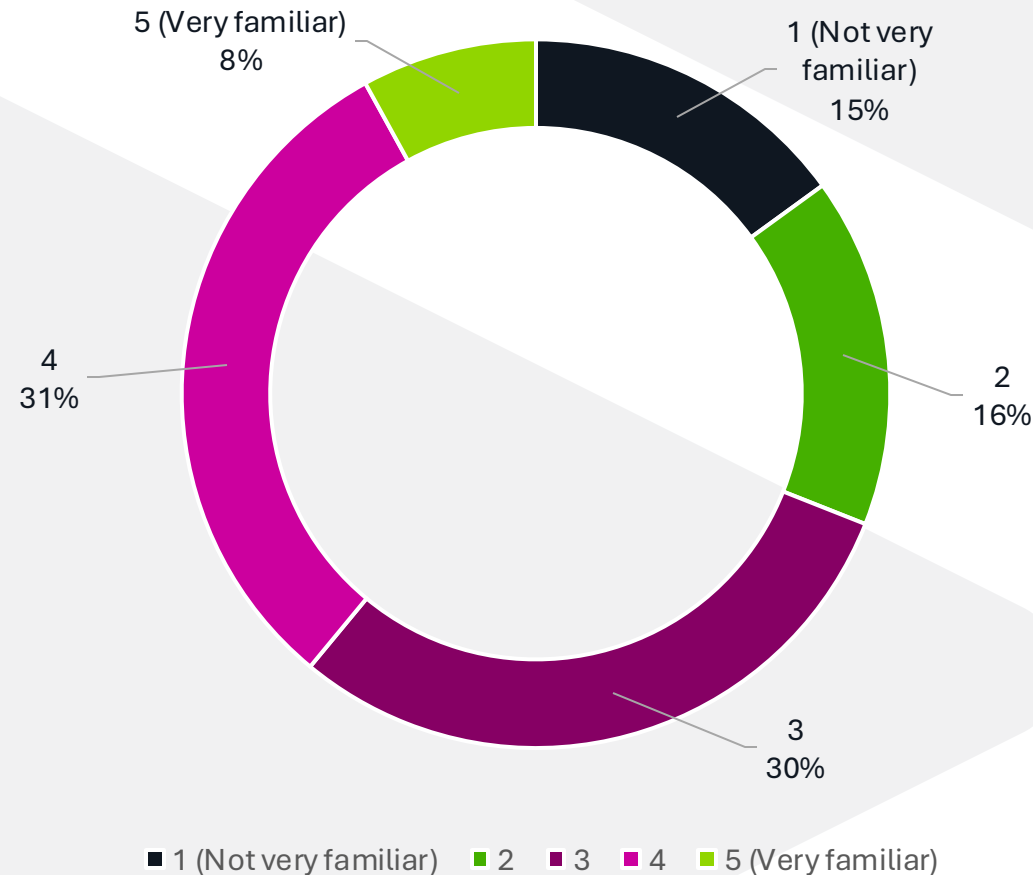
Has a pharmaceutical company ever provided you with information about your EHR platform?
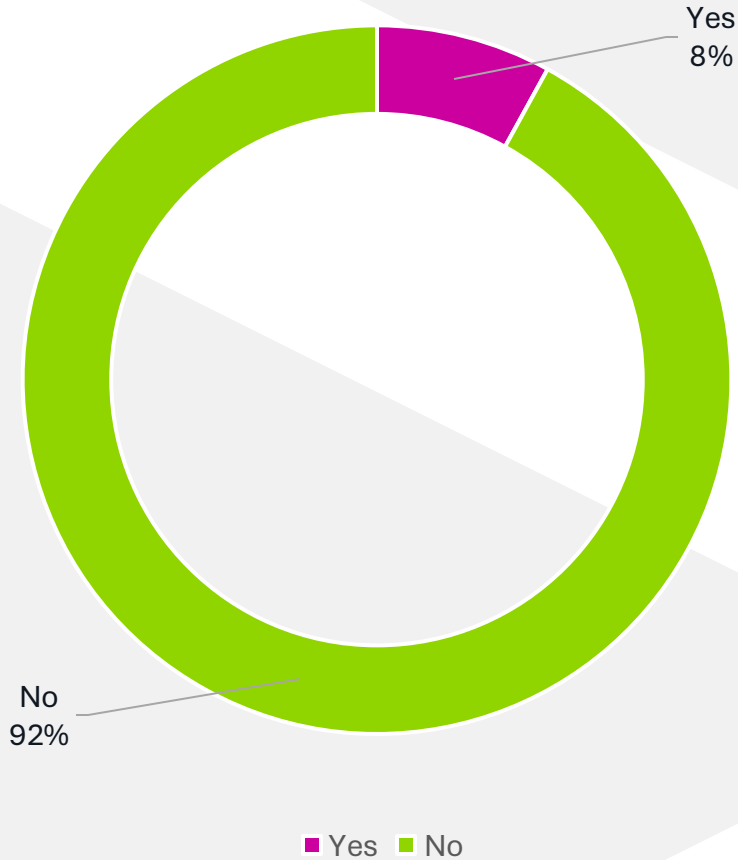
Insight: Only 8% of HCPs report learning something about their EHR from a pharmaceutical company

Yes
8%

No
92%

■ Yes ■ No

How open would you be to a pharmaceutical representative sharing new, quick ways you can make better use of your EHR when prescribing a drug (e.g., increasing efficiency, streamlining workflows)?

Insight: 74% of HCPs are open to learning more about their EHR via a Pharma Rep
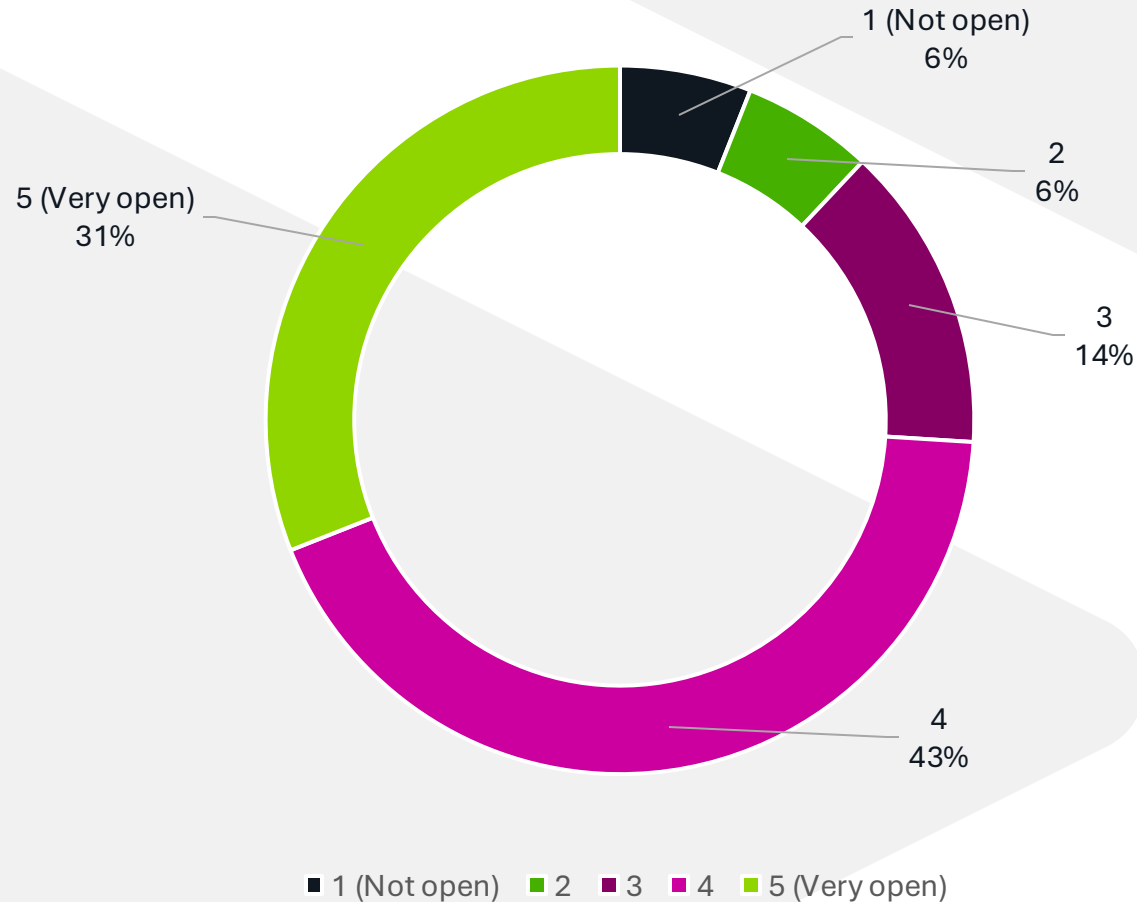
1 (Not open)
6%

2
6%

3
14%

4
43%

5 (Very open)
31%

■ 1 (Not open) ■ 2 ■ 3 ■ 4 ■ 5 (Very open)

If a branded drug required a prior authorization (PA), how helpful would it be to know exactly what the PA required of you before prescribing the drug?

Insight: 90% of HCPs stated it would be helpful to learn about the specifics of a Prior Authorization

1 (Not helpful)
2%

2
3%

3
5%

4
35%

5 (Very helpful)
55%

■ 1 (Not helpful) ■ 2 ■ 3 ■ 4 ■ 5 (Very helpful)
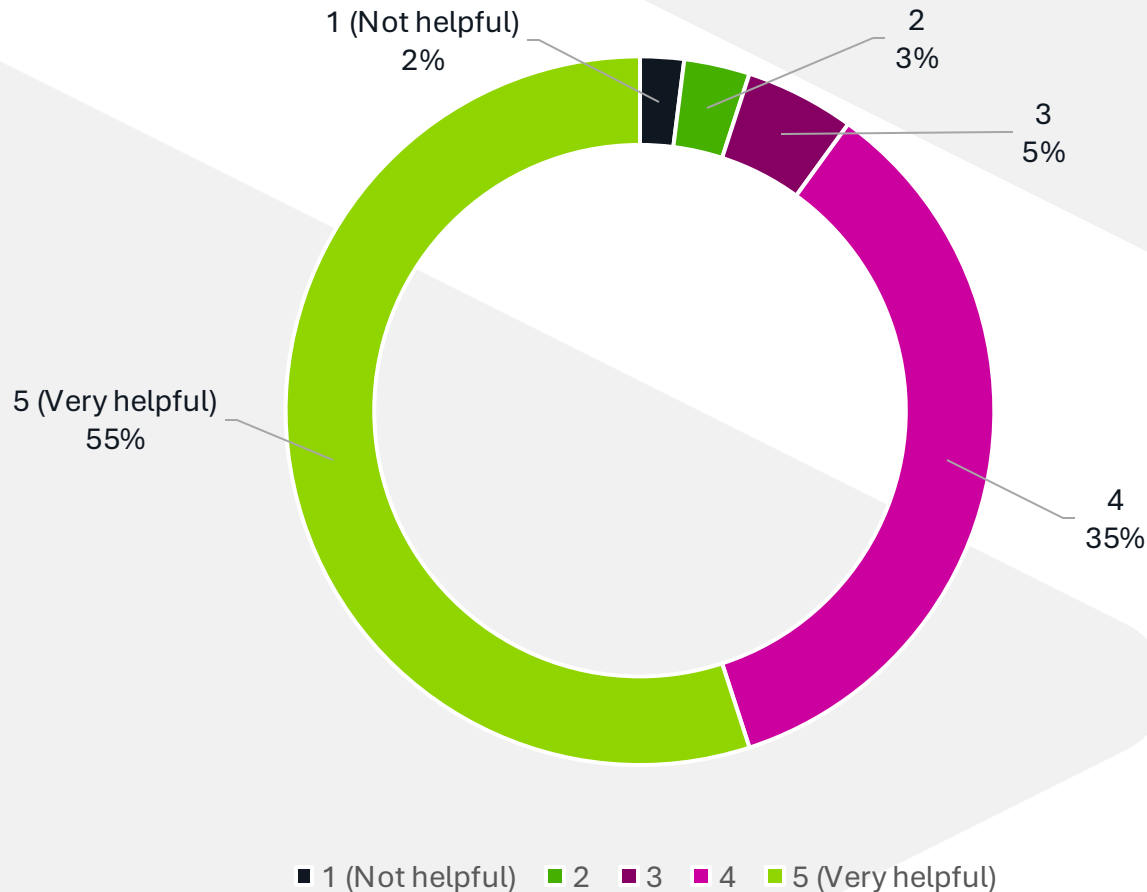
Assuming a drug has a Prior Authorization (PA), are you more likely to prescribe that drug if you are aware of how you should navigate the PA (Rep shares specifics with you about the PA)?
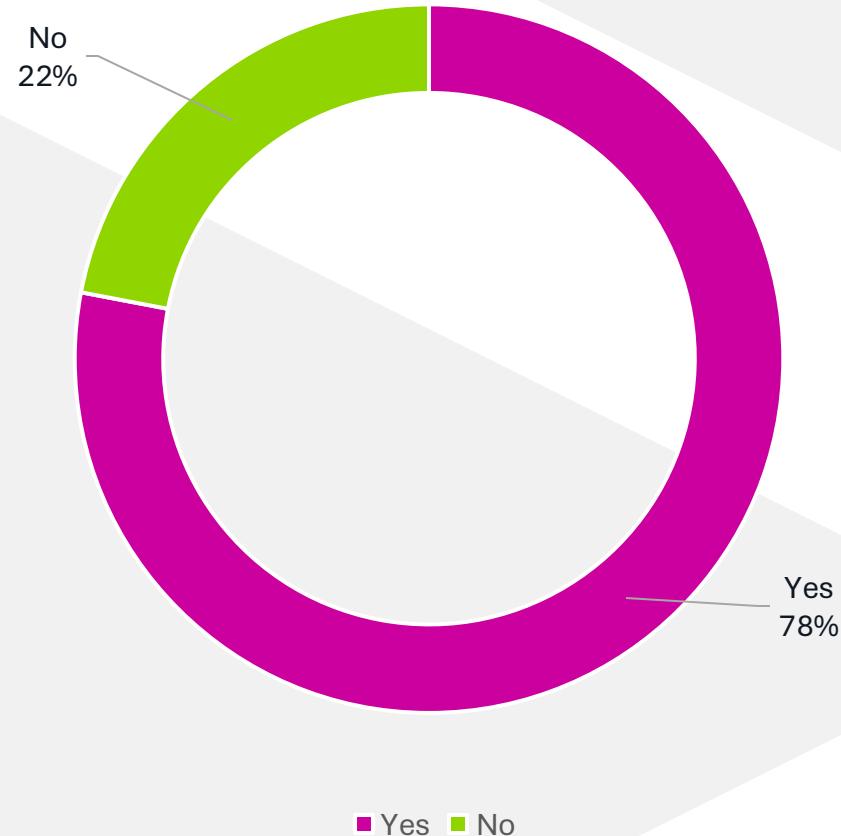
Insight: 78% of HCPs are more likely to prescribe a drug if they know how to navigate the PA

No
22%

Yes
78%

■ Yes ■ No

The market access landscape is changing – fast.

Precision AQ equips pharma marketers to drive radical Rx growth for their brands. Learn more about our annual survey findings, and how to optimize your market access pull-through at **precisionaq.com/access-genius**

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