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Self-medication and self care awareness: Empirical evidence from Greece

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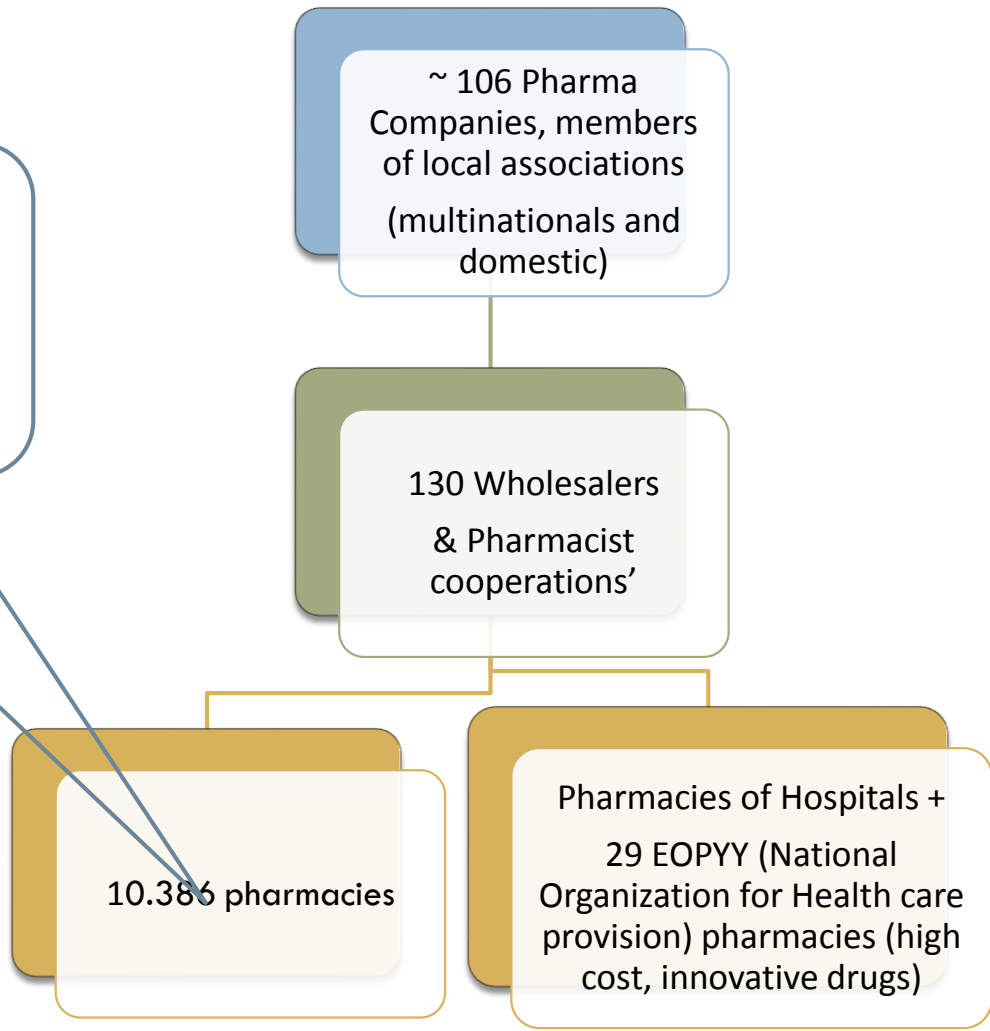
The first empirical study on self medication in Greece under the new regulatory environment



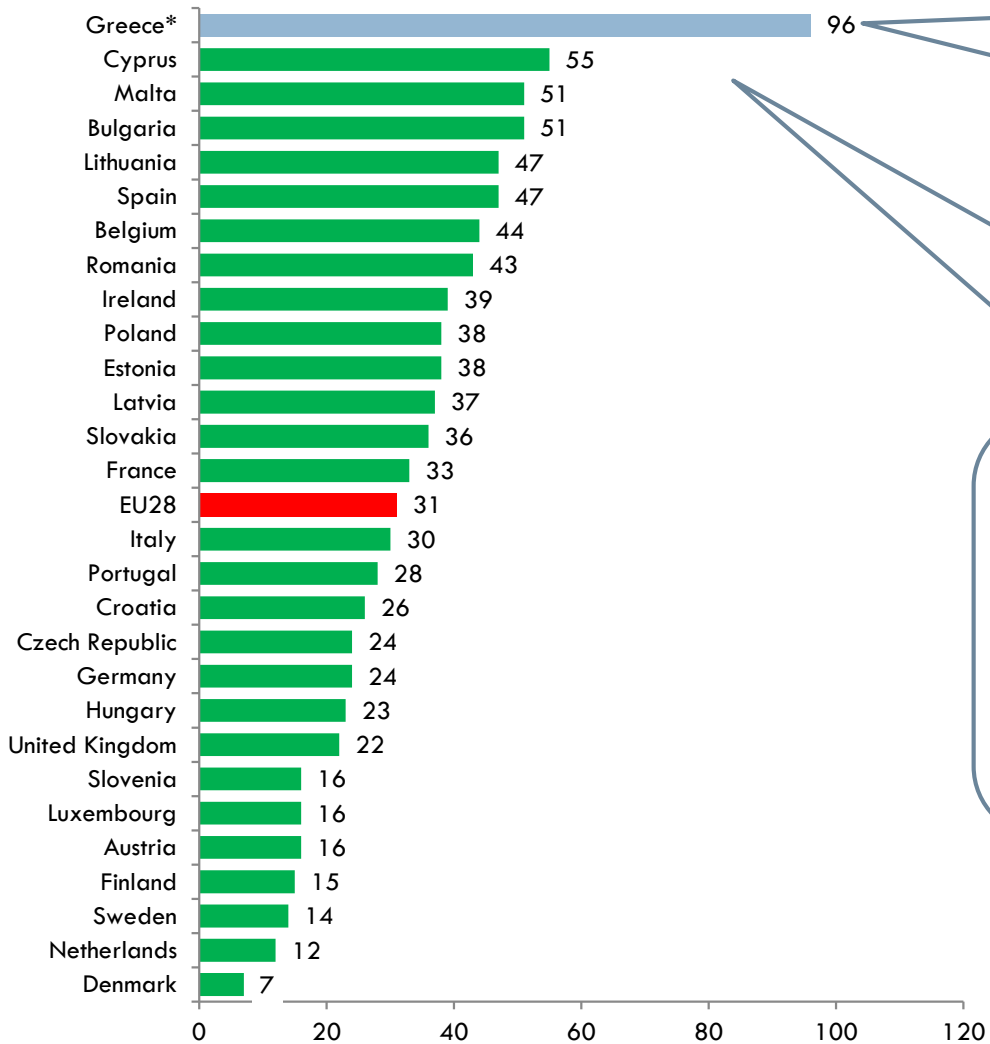
- Examine perceptions of consumers and pharmacists on self-care and self-medication, under the current legislative environment for self-care & OTC medicines in Greece
- Undertake a field research on two samples: Pharmacists' and Consumers' perception for self-care, self-medication and OTC
- Discuss possible social and economic benefits from self-medication development in Greece (qualitative rather than quantitative approach)
- Policy proposals for a responsible development and use of self-medication and the possible role of pharmacists, doctors, pharma industry and the Greek state

The supply chain for pharmaceutical products in Greece

Pharmacies are still the only distribution channel for OTC medicines in Greece (although out of pharmacies are now allowed as sales points)



Number of Pharmacies per 100.000 inhabitants, EU28 (2017)



Greece ranks first in EU-28 (2017)

- To some extent this is a result of the geographical morphology of the country (islands and remote regions)
- Despite the fact that geographical restrictions were active till 2012 (now only population restrictions)

Source: ABDA. German Pharmacies, Figures Data Facts 2017, EL.STAT., 2017 * Data for Greece come from the latest available ELSTAT data.

The OTC environment in Greece 2010 - today

1. Before 2010

- All medicines reimbursed, while prices of medicines were controlled by the government,
- Patients heavily depended on doctors diagnosis, whereas pharmacists had a medicine-dispenser role
- Public pharma market: €5.1 bil in 2009, OTC Market: €260m (4,7%)
 - ▣ 100% reimbursement for Hospital care, 75% for primary care

2. Major reforms on health system from 2010 till onwards

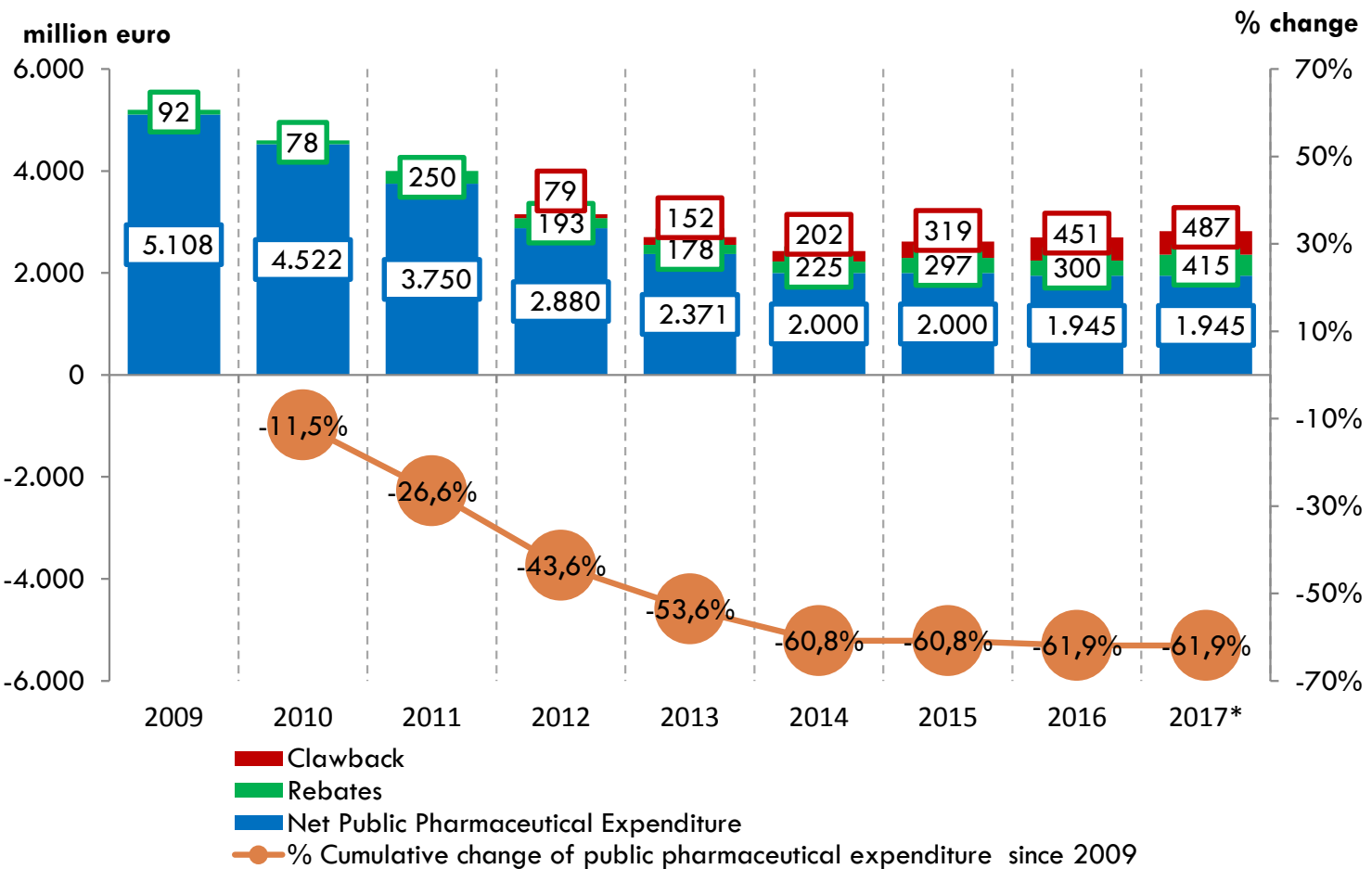
- Industry: Repeated product price decreases, increase of taxation on sales
- Doctors: E-prescription reform. Limits in number of products/Rx, Shortages in medical/nursing staff
- Patients: Increased contribution in the cost of medicine, Special fee per doctor visit
- Pharmacists: Reduction of profit margin, Extension of working time, Significant change in entrepreneurship status

3. Milestone development in OTC market

2010: OTC's are no longer reimbursed

2017: Legislation introducing semi-free pricing (Indicative Retail Price)

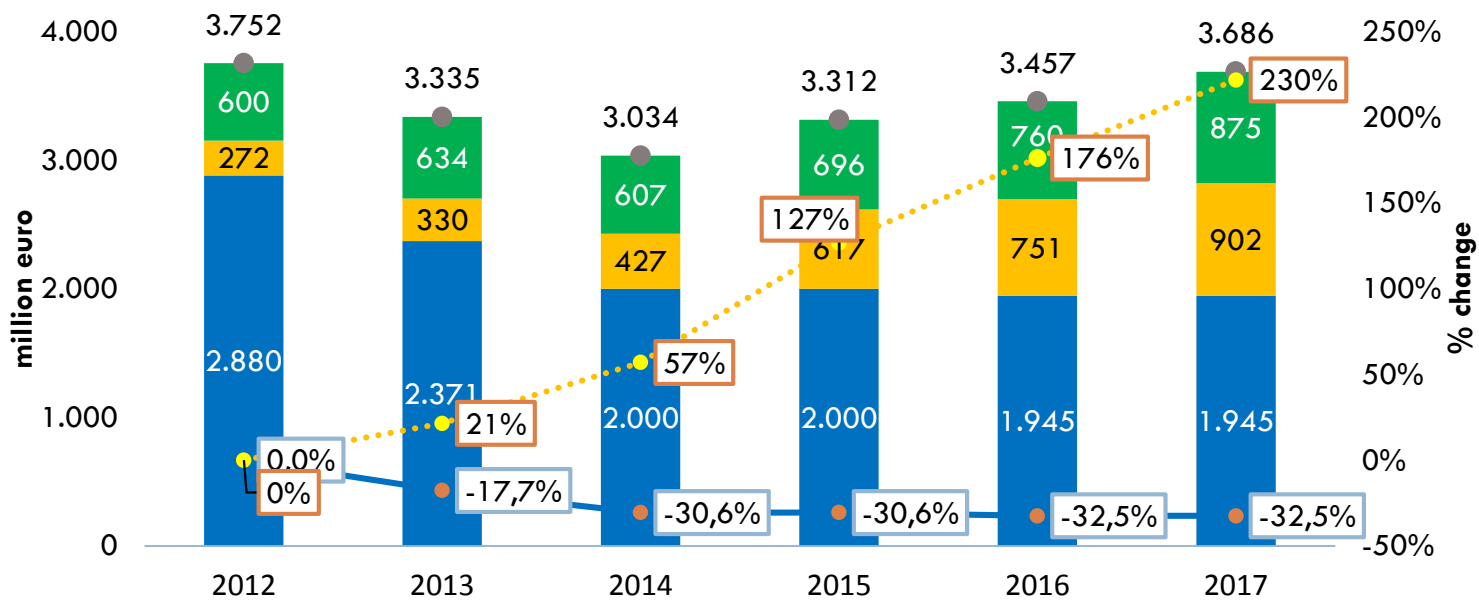
Overall decrease by -61.9% during the period 2009-2017 (and 2018) in the outpatient pharmaceutical expenditure (mil.€)



A significant increase in the contribution of the pharmaceutical industry through clawback and rebates.

Source: EOPYY 2012-2017, State Budget 2014-2016, Government Gazette 681 (08/03/2012), Gov. Gazette 3035 (15/11/2012), Gov. Gazette 2045 (22/08/2013), Gov. Gazette 2243 (18/08/2014), Gov. Gazette 1803 (20/08/2015), Law 4354 (A ' Gov. Gazette 176 (26/12/2015), Gov. Gazette 2758 (18/12/2015), Gov. Gazette 241 (23.12.2016), Gov. Gazette 74 (19.05 / 2017) , Law 4486 (A ' Gov. Gazette 115 (07/08/2017), Data processing IOBE-SFEE*

Total outpatient pharmaceutical expenditure (including co-payment): € 3.7 bil. (2017)



■ Co-payment
■ Pharma industry participation
■ Public pharmaceutical expenditure
● Total outpatient pharmaceutical expenditure
—●— Change in public outpatient pharmaceutical expenditure (% cumulatively from 2012)
-.-●- Change in pharma industry participation in outpatient pharmaceutical expenditure (% cumulative from 2012)

Reduction in public outpatient pharmaceutical expenditure (–32,5% during 2012-2017) resulted in

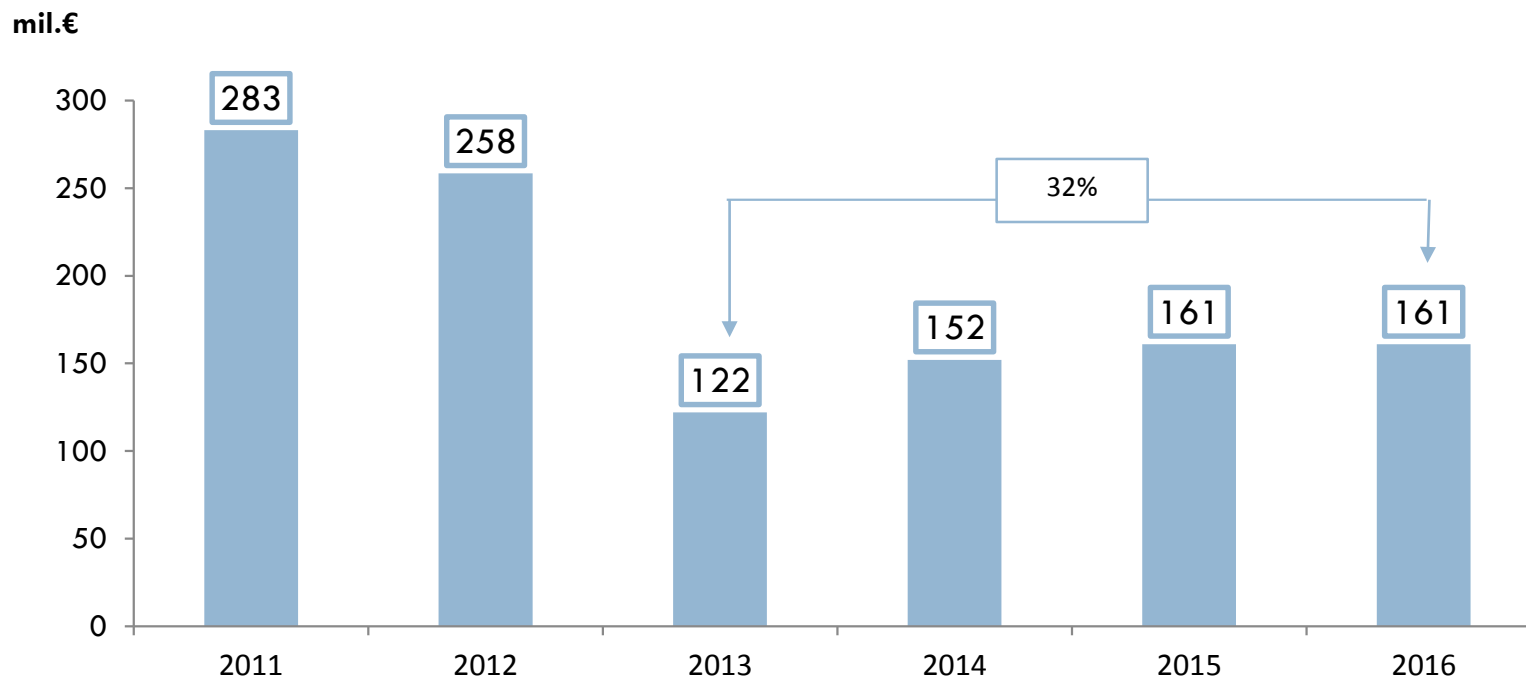
- a shift to the private sector (co-payment increased by 50%) and
- a significant increase of 230% in pharma industry participation

For 2017, patient and industry participation reached 50% of total outpatient pharmaceutical expenditure.

- Greek public expenditure for pharmaceuticals and other medical goods at **1.1% of GDP in 2015** (2% in 2009) close to EU28 and Southern countries average
- Overall decrease by -61.9% during the period 2009-2017 (and 2018) in the outpatient pharmaceutical expenditure (without co-payment) (mil.€)
 - ▣ €1.945 mil. public pharmaceutical expenditure for period 2016-2018 (FIXED)
- The reduction in public outpatient pharmaceutical expenditure (-32,5%) during 2012-2017 resulted in a shift to the private sector
 - ▣ co-payment increased by 50% and
 - ▣ significant increase of 230% in pharma industry participation over the same period through clawback and rebates

The OTC market (medicines) followed an upward trend from 2013 onwards (+32%)

*OTC medicines
Wholesale prices*



The value of self-medication in Greece

- The OTC market in Greece continues to show steady growth and broadens
 - **Estimated for 2018: 250 mill based on retail prices (medicines)**
- Pressure on healthcare services is increasing and people need to be supported to care for their own health.
- Self-care is the first step in health care and self-medication with OTCs is the first choice in the treatment of mild health issues and their symptoms, with the guidance of a pharmacist
- Self-care has short and long-term benefits for consumers and also contributes to reduce demand of the health system.
- Savings up to €160 mil in pharmaceutical expenditure resulting from a possible move of 5% of prescribed medicines to over-the-counter (OTC) self-medication list (according to NSPH survey in 2012).

Recent legislative reforms

Greek OTC market is being transformed in a semi-free pricing environment.

2016

Liberalization of distribution channels of OTC medicines (2016)

- Establishment of a sub-category of OTC medicines General Purpose Drugs (GEDIFA)
- 216 medicines out of a total of 1,582 medicines can also be available at a non pharmacy sales point (supermarket)

2017

Lift (partial) of OTC price barriers as of May 2017

- A new approach on pricing: an “indicative” retail price of OTC medicines, which is not compulsory however
- A maximum mandatory hospital price



Price de-regulation, price liberation will enhance competition and provide room to many other companies to address the needs of consumers and enlarge the OTC market

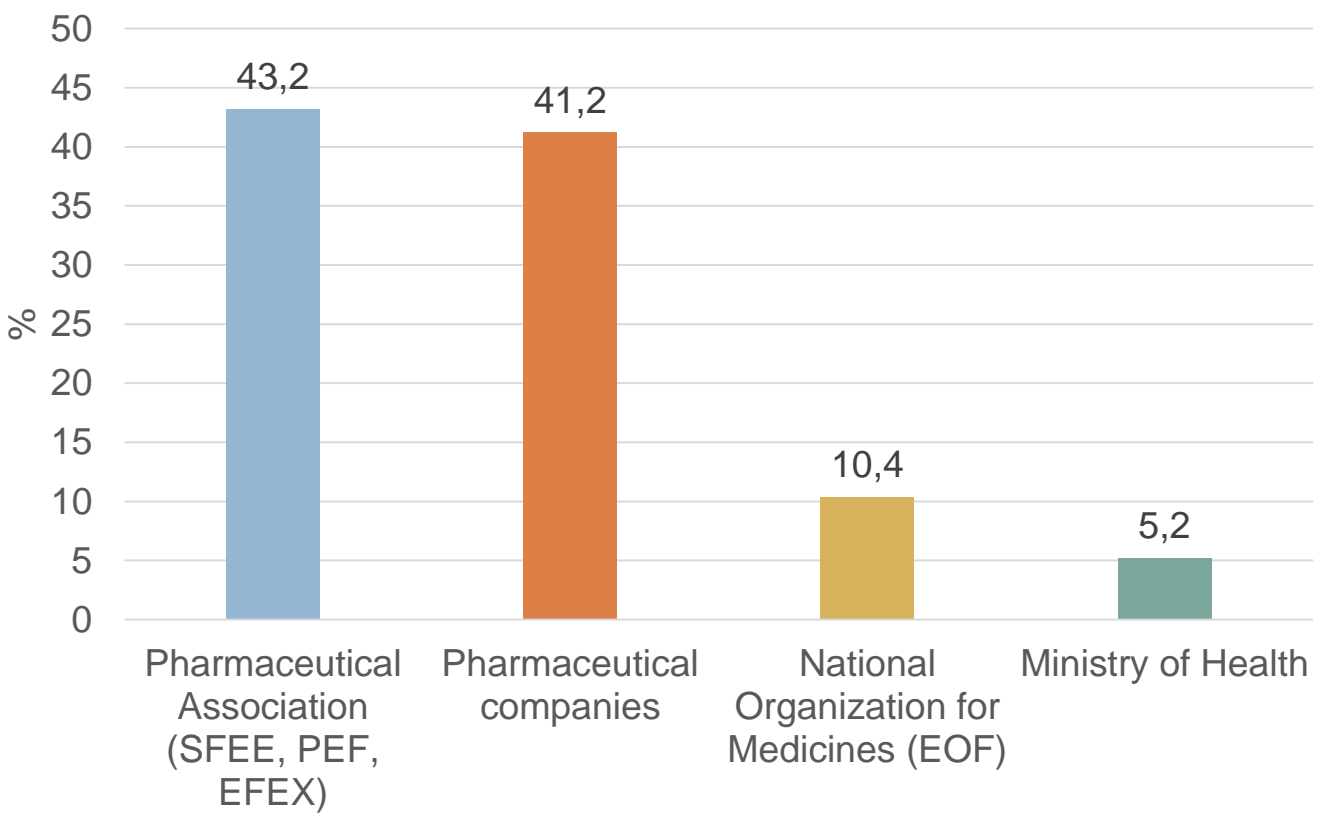
- Primary field designed by IOBE
 - A call center (Data Power S.A.) was used for telephone interviews using CATI (Computer Assisted Telephone Interviews)
 - Undertaken in 2017
- **Pharmacists' perception and attitude**
 - A representative sample of 250 pharmacists from all 13 administrative regions of the country (NUTS II)
 - Questionnaire: 23 questions for (average duration ~ 6-8 minutes)
- **Consumers' perception and attitude**
 - A representative sample of 1,000 consumers from all 13 administrative regions of the country (18-64 years old)
 - Questionnaire with 33 questions for the consumers in 3 sections: i) Self-care, ii) Use of OTC, iii) Pharmacist-Pharmacy (average duration ~ 8-10 minutes)

The Pharmacists' view

Pharmacist has an important role as primary health care advisor and understand the need for continuous education-training about OTC

All pharmacists who participated in the survey (98%) stated that they can respond to a possible role of a primary health care advisor.

Pharmacists' preference for their education-training about self-care and self-medication

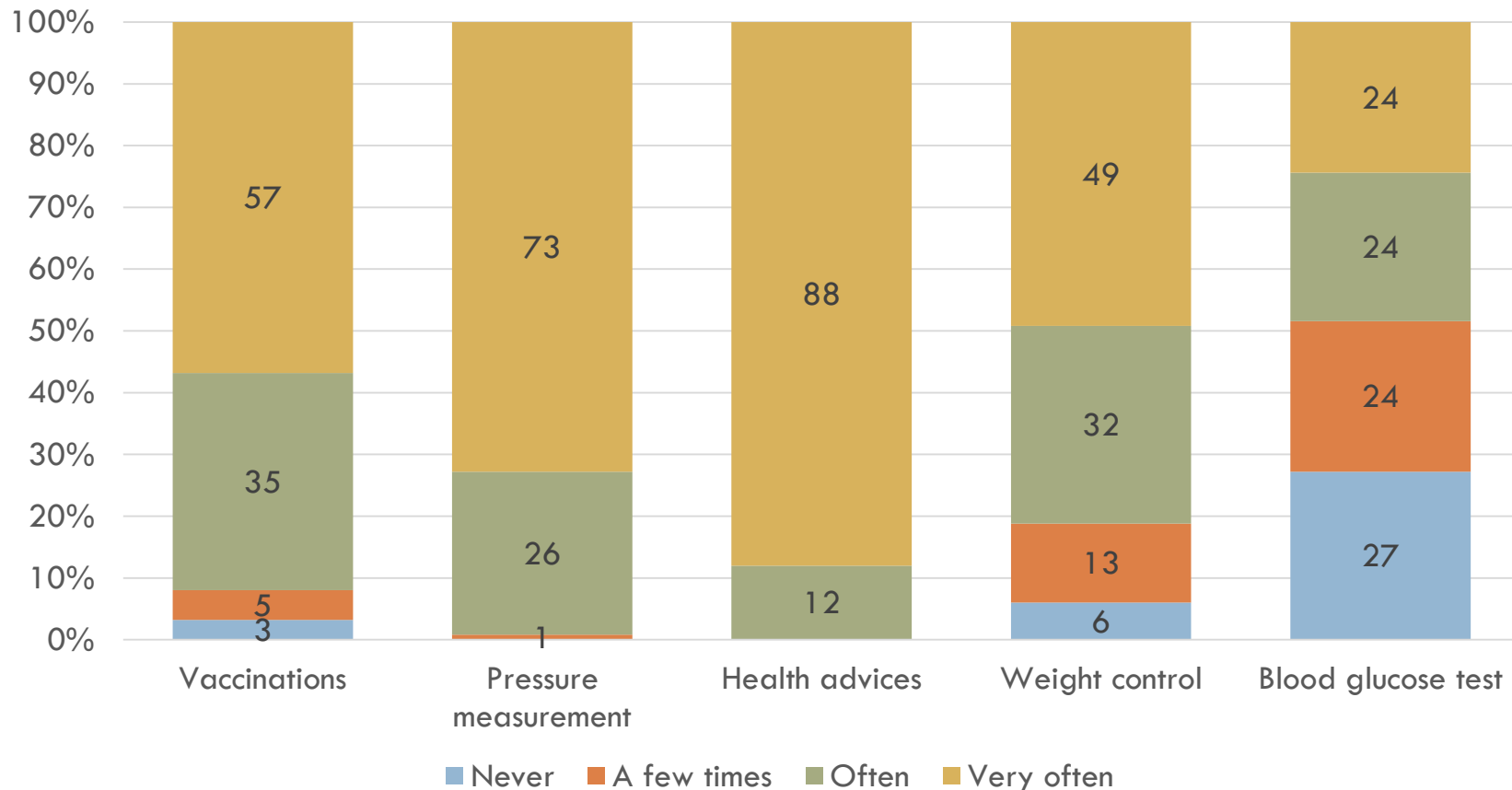


Majority of pharmacists' prefer for their education/training on OTC medicines the associations of pharma companies / pharma companies: **A market approach rather than a State approach**

Half pharmacists spent daily 1 hour for pharmacy services. Another 30% spent daily up to 2 hours! (85% in total)

Usually they provide general health advices (88%), measure consumers pressure (73%) and make vaccinations (57%),
They rarely do more complicated tasks like blood glucose tests.

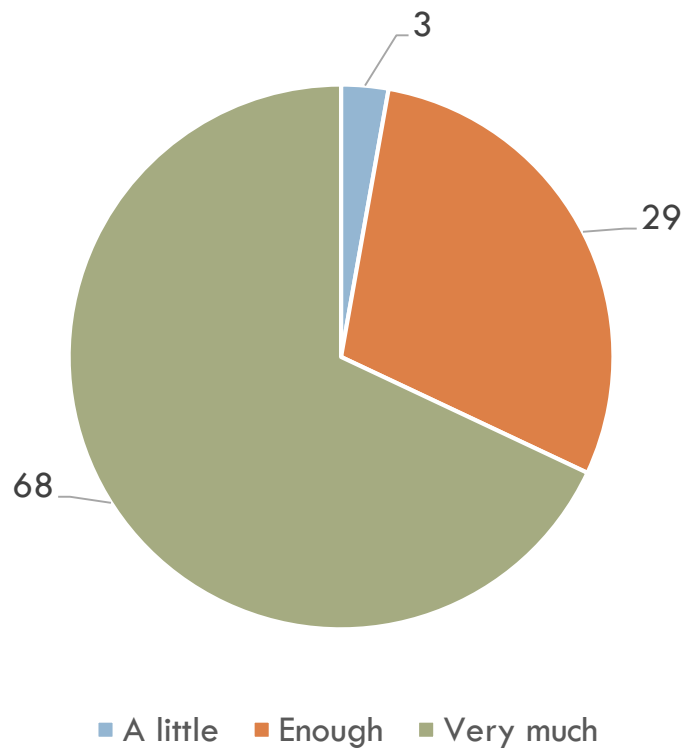
Pharmacy services



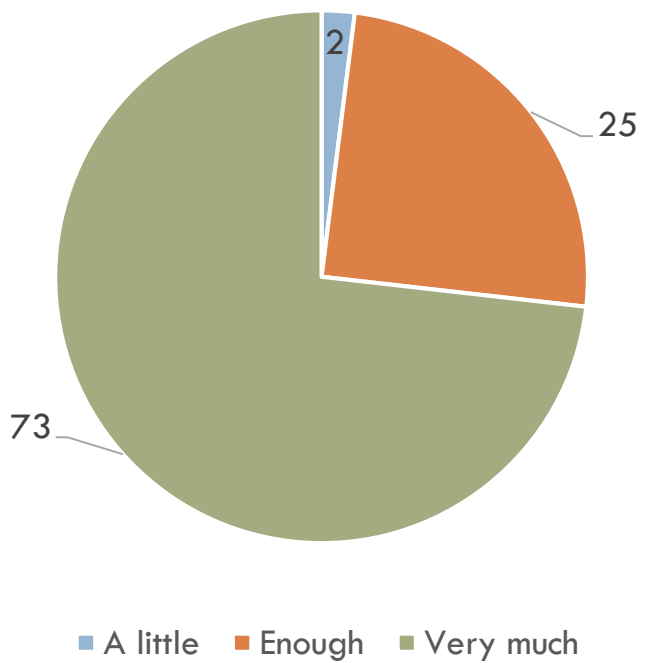
Nearly 7 out of 10 pharmacists believe that OTC medicines contribute to their role as a PHC advisor

Almost all pharmacists (98%) considered that OTC medicines play important role to their communication with consumers

Contribution of OTC to the role of pharmacist as PHC advisor



Knowledge for OTC build trust and help the communication between pharmacist and consumer

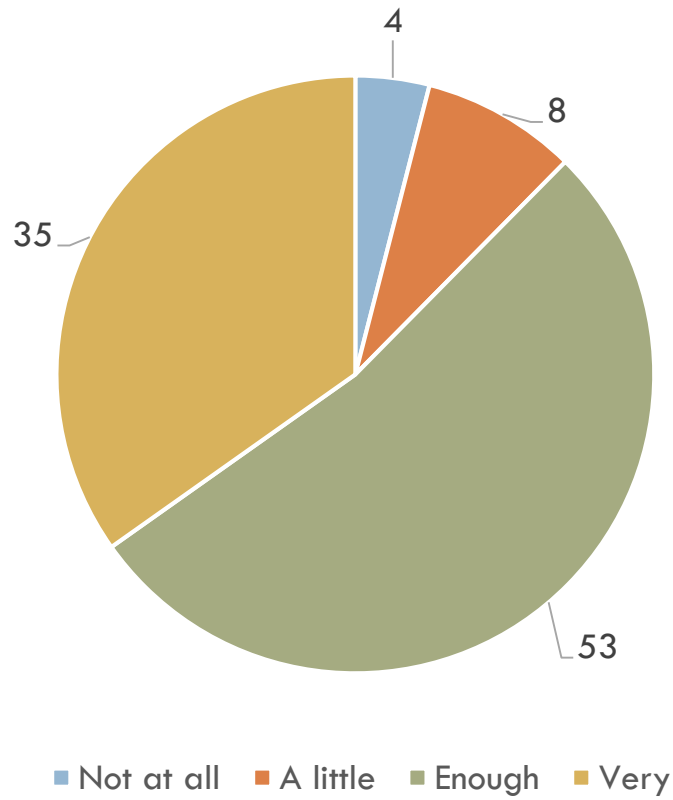


Almost 8 out of 10 pharmacists believe that they have good knowledge of OTC which significantly strengthen their role as PHC

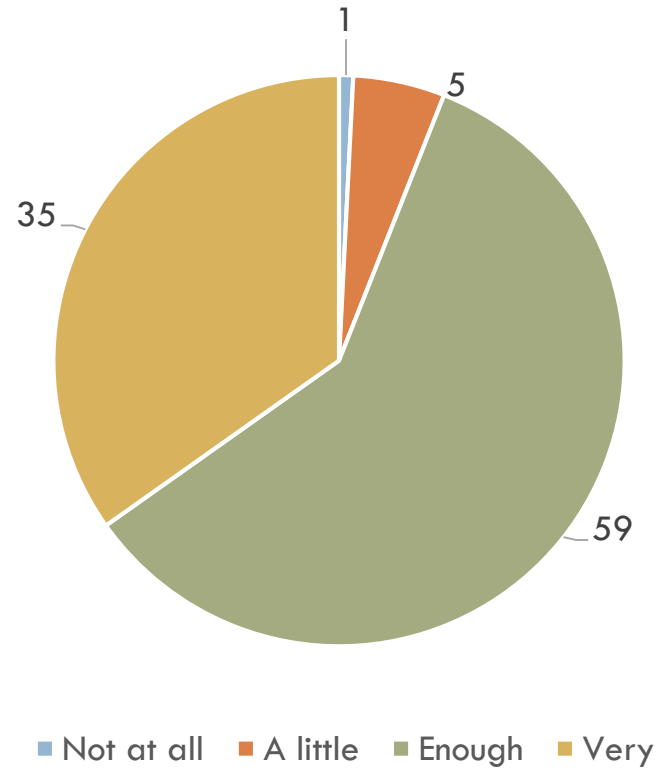
There is wide consensus (9/10 pharmacists) on OTC as safe medicines

According to pharmacists, 9 in 10 consumers also believe that OTC are safe medicines
 The pharmacist helps consumers to make responsible use of OTC .

Pharmacist's trust in the OTC



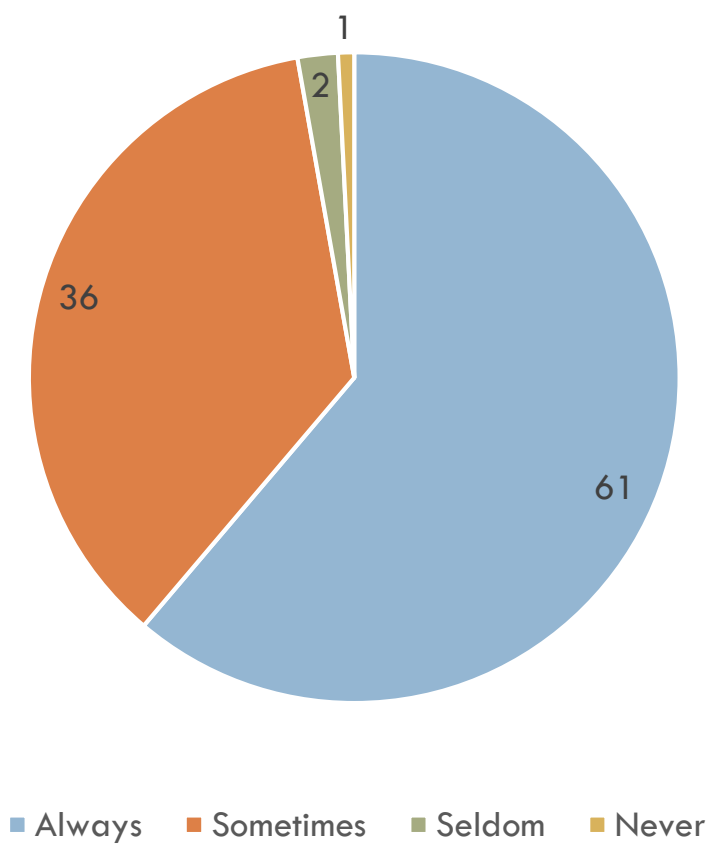
Consumers' trust in the OTC (according to pharmacists)



Helps consumers to responsible use of OTC: 6 out of 10 consumers always ask the pharmacist before buying an OTC



Ask pharmacist before buying OTC

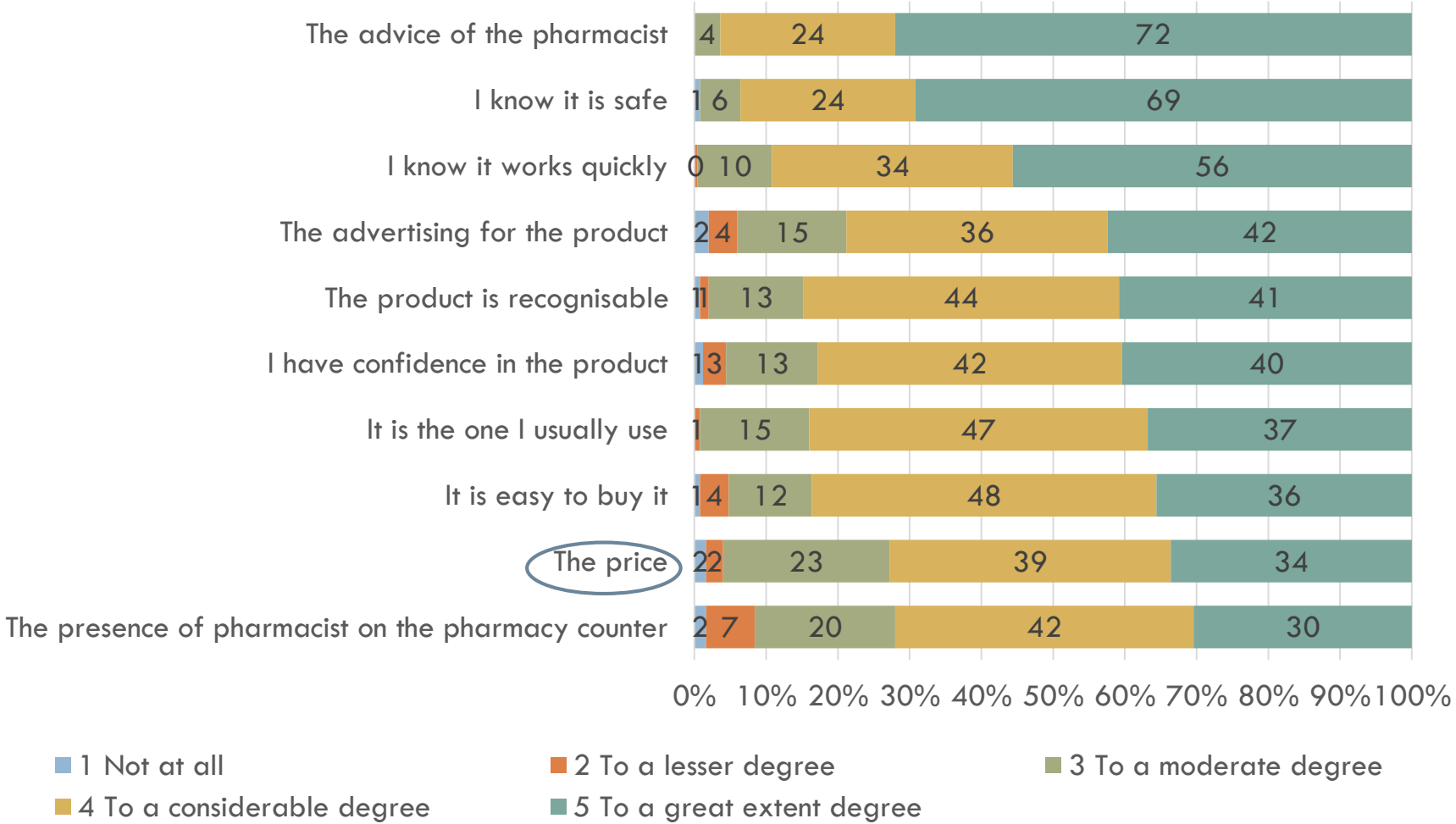


Self-medication and OTC medicines support consumers to manage minor health problems

Pharmacists' advice the major criterion that affects consumers when buying OTC medicines



Main criteria when buying OTC



To sum up...

- The majority of pharmacists feel confident to respond to their role as PHC advisors and understand the need for continuous education-training about OTC medicines
- They spent 1-2 hours daily to provide pharmacy services (usually give health advices, measure pressure and make vaccinations).
- Almost all pharmacists considered that OTC medicines play important role to their communication with consumers and the majority believe that OTC medicines contribute to their role as a PHC care advisor
- Greek pharmacists trust and consider that OTC medicines are safe
- Pharmacists help and protect consumers for responsible use of OTC as more than half of the consumers always ask the pharmacist before buying an OTC
- Pharmacists' advice seems to be a crucial criterion that affects consumers when buying OTC medicines

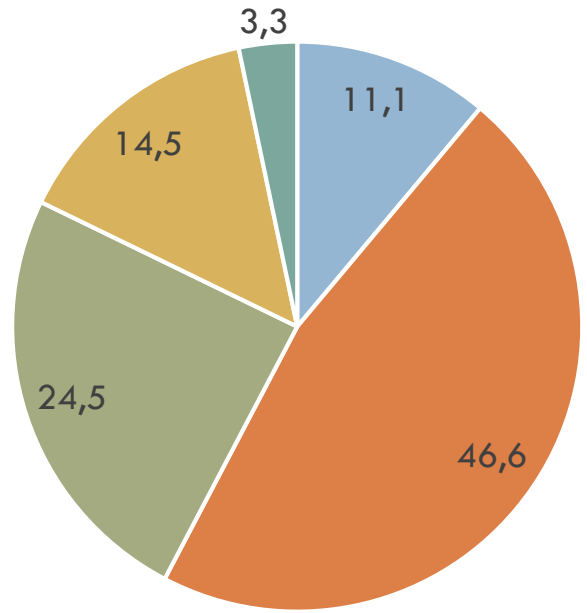
The consumers' view

3 out of 5 consumers did not know the term self-medication

Greek consumers are still unfamiliar with these terms, although they undertake such actions of self-medication.

After explaining the term self-medication to consumers, nearly 9 in 10 stated that they have used self-medication at least once during the previous year

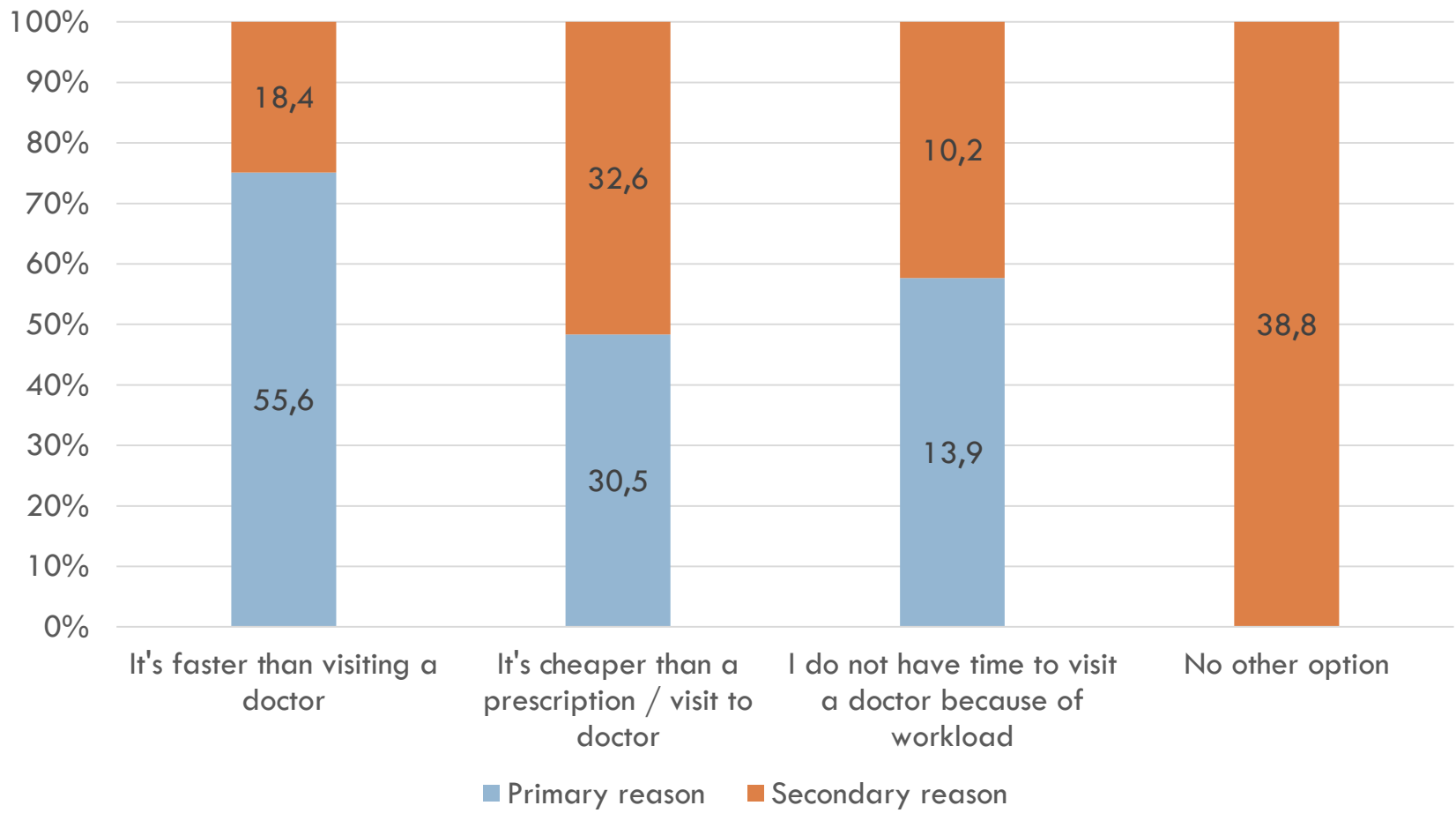
Self-medication practices within 12 months



- Never
- A few times
- Often
- Very often
- Always

More than half of consumers believe that self-medication is a “quicker” response than visiting a doctor

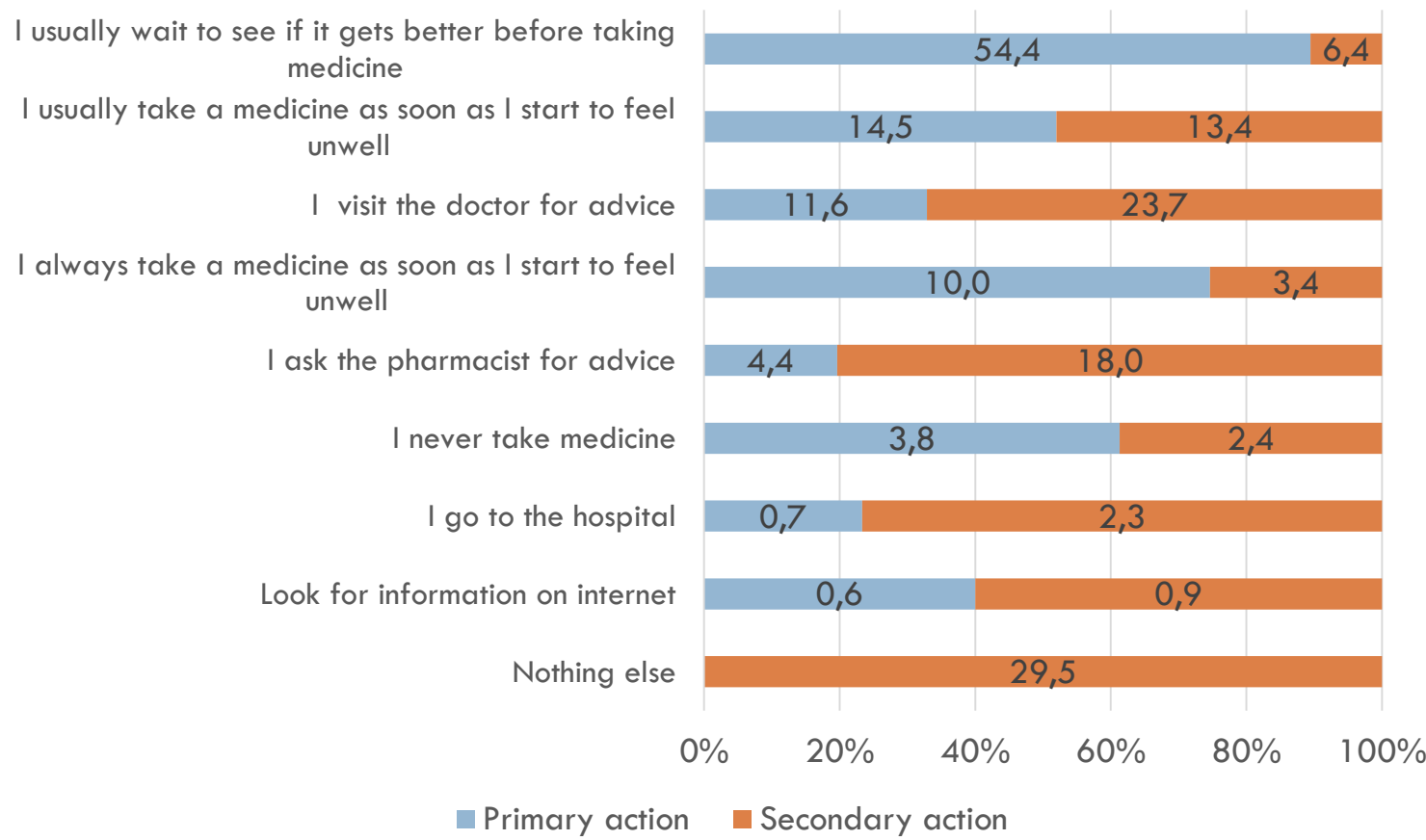
Self-medication is a more affordable option than visiting a doctor (63%) and an time-saving option (24%)



A “wait and see” action during the early stages of a mild disease, for over half of the consumers

35% visit a doctor and 28% of consumers take an OTC medicine when they do not feel well

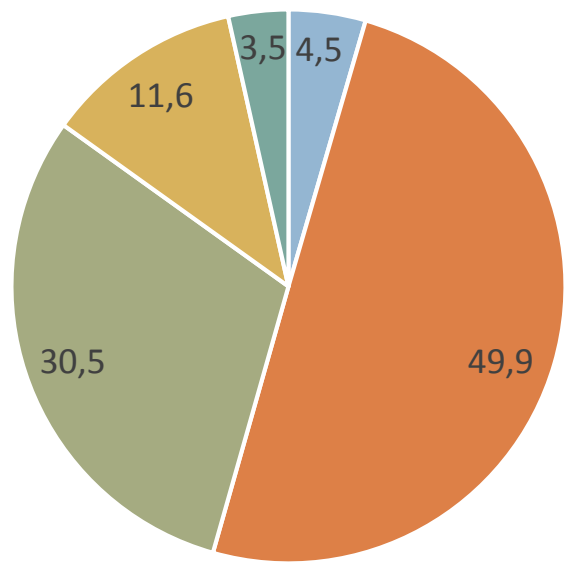
Actions during the early stages of a mild disease



Almost 7 out of 10 consumers did not know the term Non-prescription medicines (OTC)

After the explanation of the term OTC almost all consumers answered that they have bought OTC medicine at least once during the previous 12 months

Have bought an OTC medicine during the last 12 months

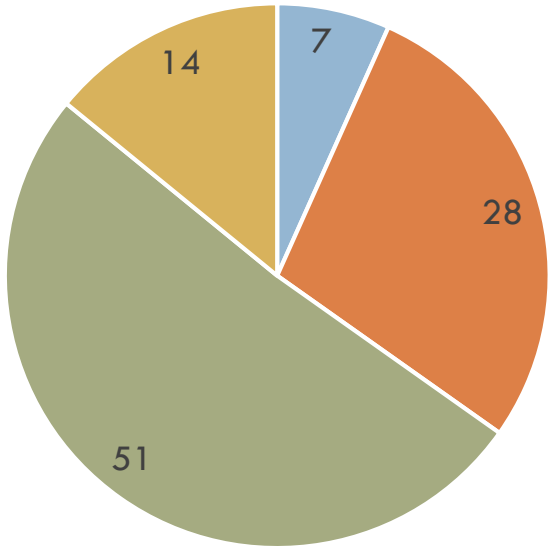


■ Never ■ A few times ■ Quite often ■ Very often ■ Always

Nearly 7 out of 10 consumers believe that they can deal effective with common health problems

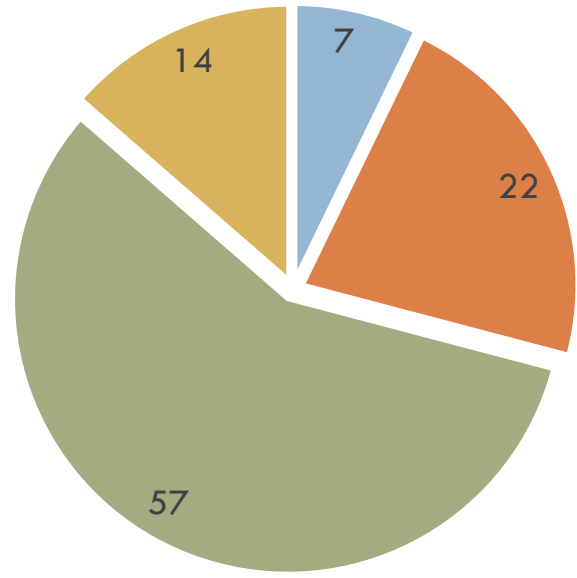


Deal with common health problems by yourself



■ Not at all ■ A little bit ■ Enough ■ Very much

Trust OTC as safe medicines

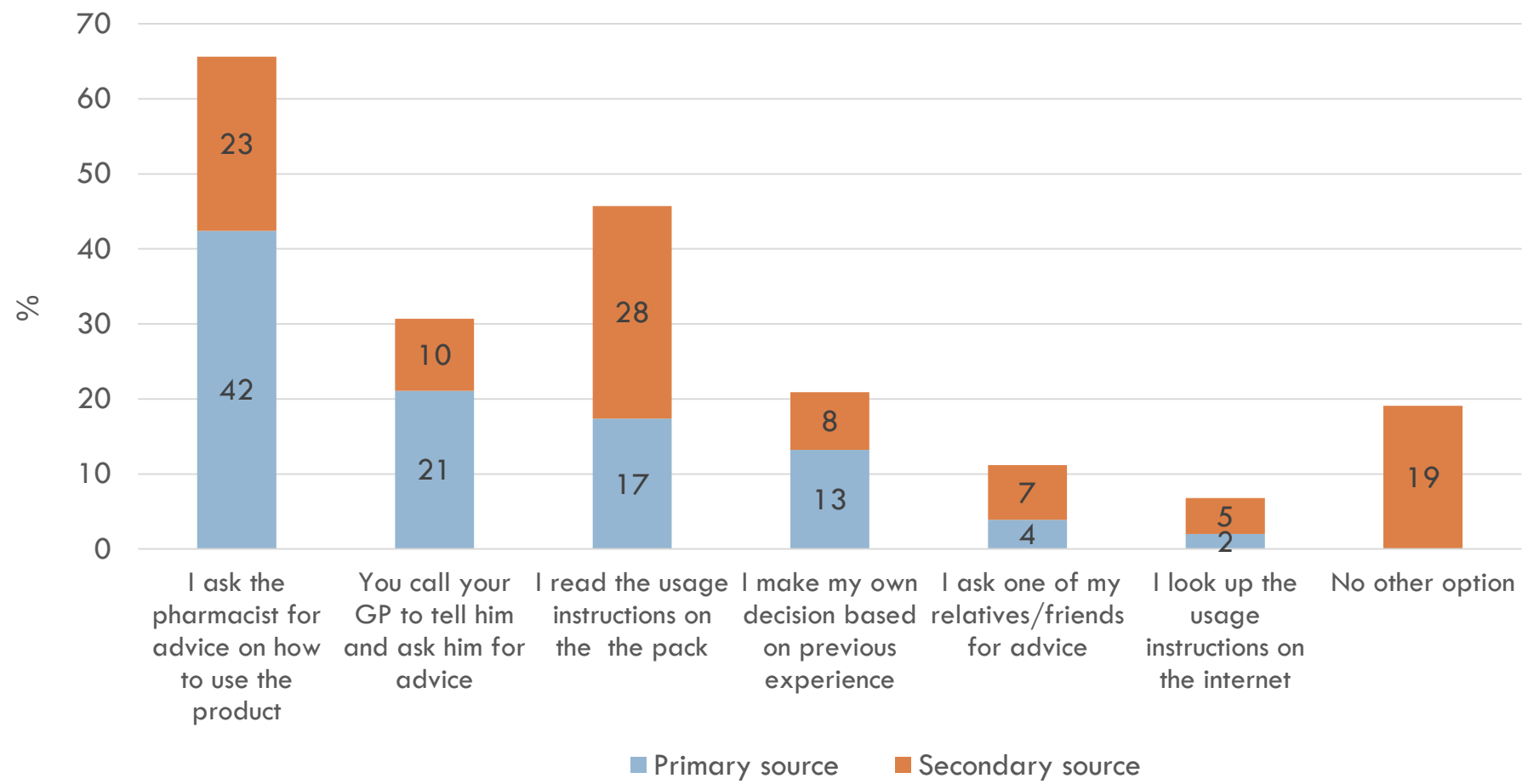


■ Not at all ■ A little bit ■ Enough ■ Very much

Nearly 7 out of 10 people – and women statistically significant more than men - trust OTC medicines as an effective tool for mild health issues

42% of consumers choose the pharmacist's advice as the main source of information and 21% prefer to ask the doctor

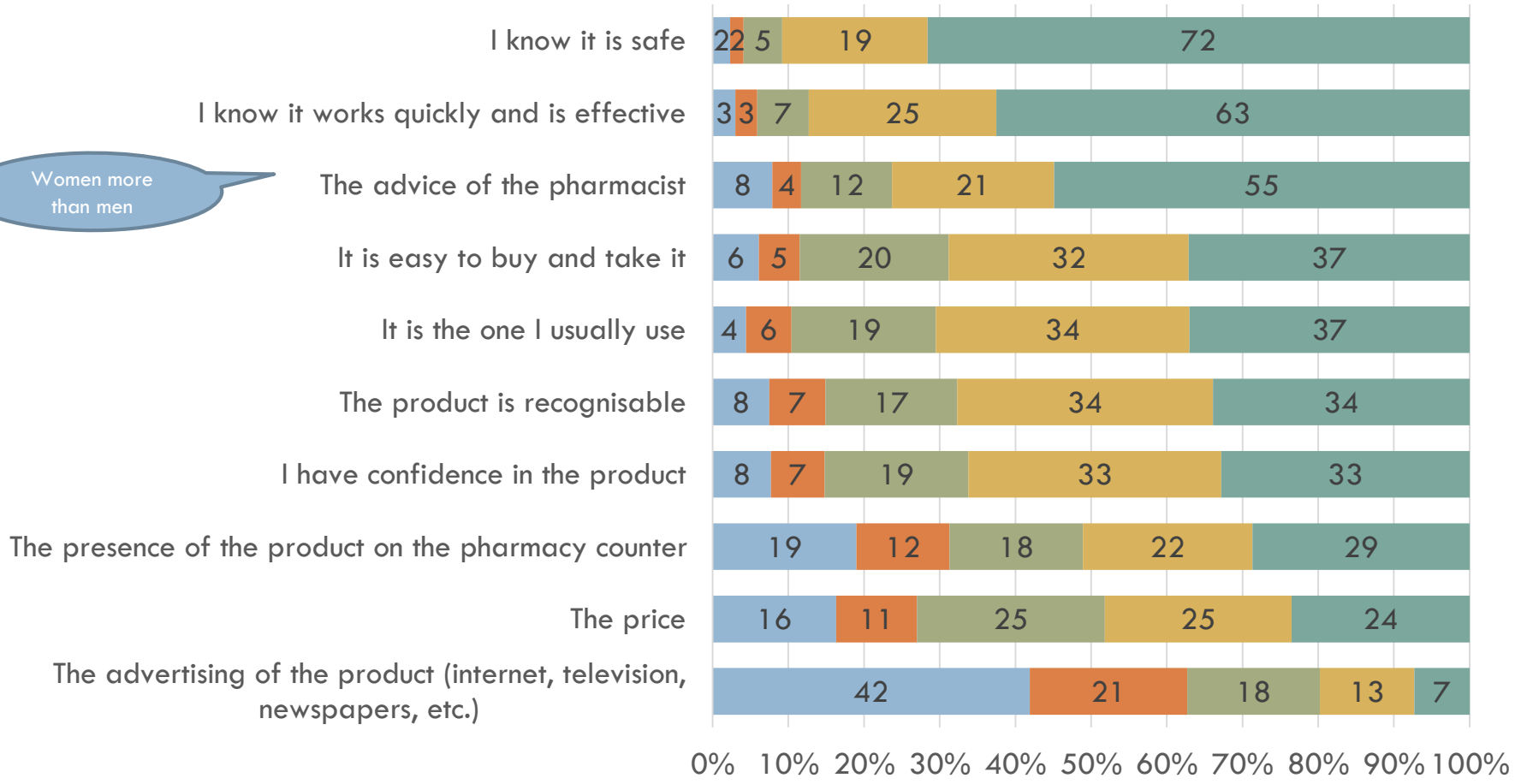
Information source about OTC medicines



Criteria for buying OTC medicines: Safety (91%), quick and effective action (88%) and pharmacist's advice (76%)

Criteria affect the purchase of OTC medicines

Women more than men

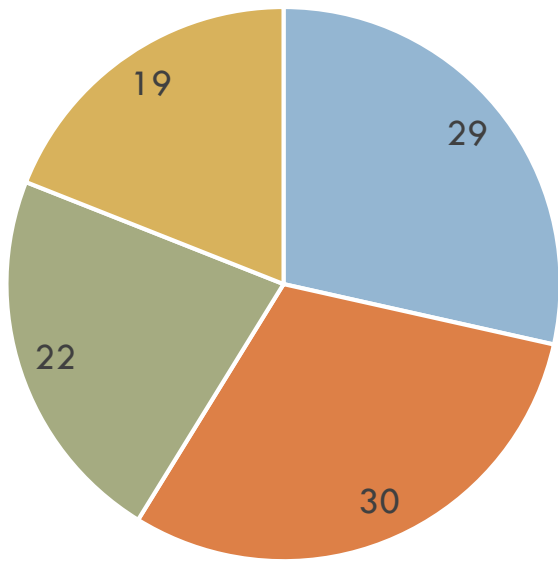


■ 1 Not at all
 ■ 2 To a lesser degree
 ■ 3 To a moderate degree
■ 4 To a considerable degree
 ■ 5 To a great extent degree

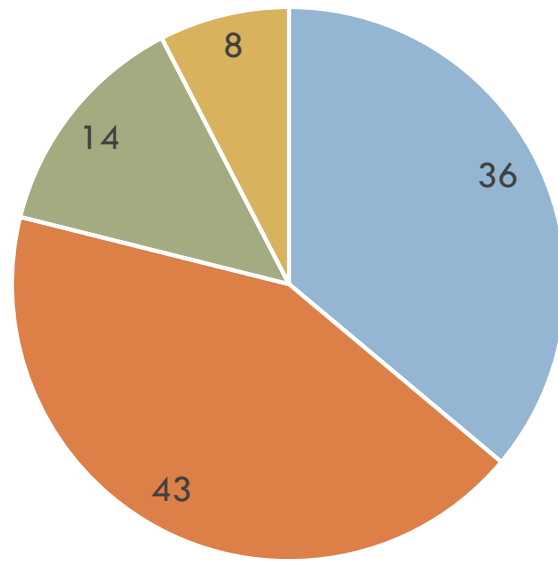
Pharmacist's advice is more "at hand" compared to a doctor's advice about the purchase of an OTC medicine

3 out of 5 consumers ask their doctor for advice while 8 out of 10 consult a pharmacist about the purchase of an OTC

Doctor's advice



Pharmacist's advice



Always Sometimes Seldom Never

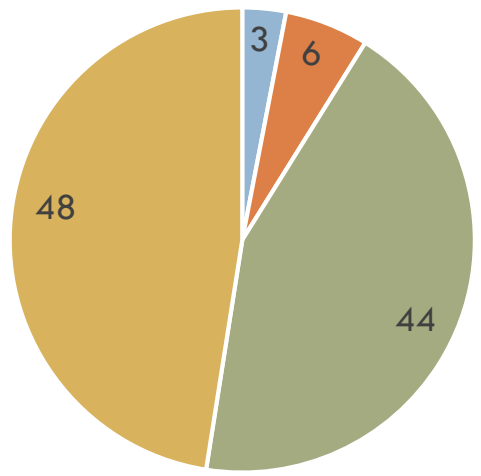
Always Sometimes Seldom Never

The majority of the elderly people (65+) tend to ask more often for the doctor's advice for the purchase of OTC medicines

9 out of 10 consumers were satisfied with the pharmacist's advice about OTC medicines

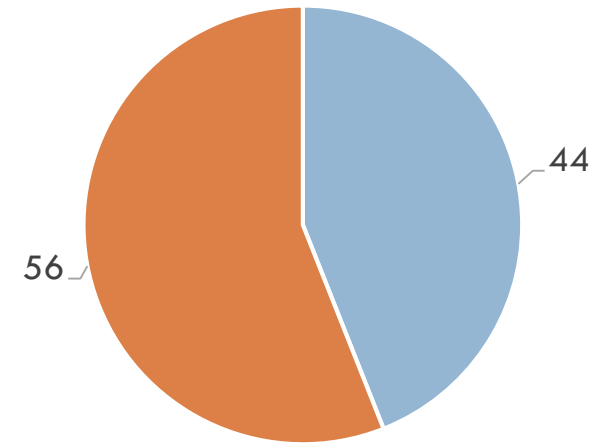
Important role of the pharmacist to protect consumer: 56% of consumers have changed their opinion on the purchase of an OTC product after the pharmacist's advice (although consumers +65 years are less eager than younger).

Satisfaction from pharmacist advice



■ Not at all ■ A little bit ■ Enough ■ Very much

Change opinion for an OTC medicine



■ Yes ■ No

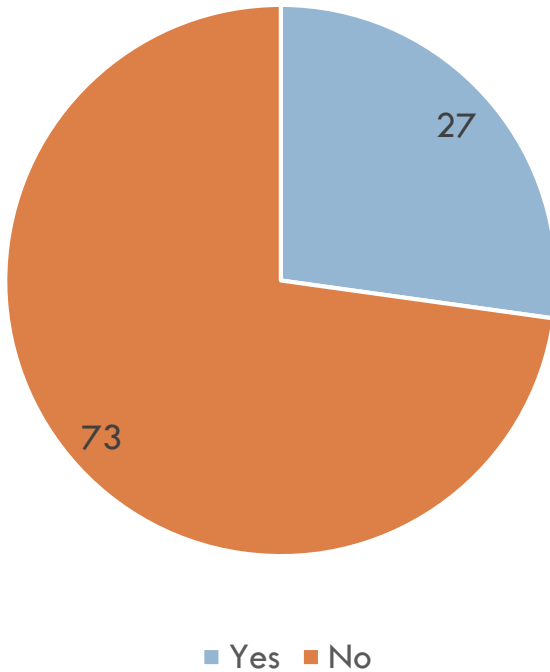
8 out of 10 consumers are willing to provide their medical history to their pharmacist if asked

Strong trust between pharmacist and consumers: they prefer the local pharmacy from the e-pharmacy



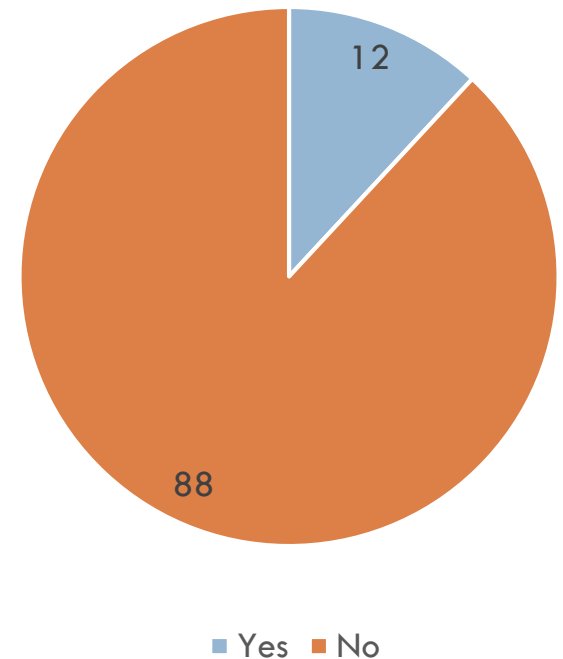
7 out of 10 consumers would not buy an OTC medicine without pharmacist's advice

Buy OTC product without pharmacists' advice



New consumer behaviors drive to e-pharmacy but 9 out of 10 consumers responded that they would not buy an OTC medicine from the internet

Buy OTC product from e-pharmacy



To sum up...

- Consumers are not fully aware of the possibilities offered by self-medication. Consumers do not know the term self-care but they undertake self-medication actions
- Although almost 7 out of 10 consumers did not know the term Non-prescription medicines (OTC) they have bought OTC medicine at least once during the previous 12 months
- Consumers believe that self-medication is a “quicker” and “cheaper” option than visiting a doctor
- Half of consumers “wait and see” if they get better during the early stages of a mild disease
- Nearly 7 out of 10 people trust OTC medicines as an effective tool for mild health issues and believe that they can deal effectively with common health problems
- Main criteria for buying OTC medicines: Safety (91%), quick and effective action (88%) and pharmacist's advice (76%)
- Pharmacists' advice is the main source of information about OTC for consumers.
- Consumers were satisfied with the pharmacist's advice about OTC medicines, they have changed their opinion on the purchase of an OTC product after the advice of their pharmacist and are willing to provide their medical history to their pharmacist if asked
- Trust building between pharmacist and consumers: they prefer the local pharmacy from the e-pharmacy

Conclusions

- All social partners (consumers, industry, state, doctors and pharmacists) should engage actively in proper and responsible development of self-care and self-medication.
- The scientific role of the pharmacist as a primary care consultant and advisor should be enhanced. The Greek pharmacist is the gatekeeper of the wider health system by informing and educating consumers for self-medication.
 - ▣ Need for continuous educational programmes for pharmacists either from the Public Sector or the Pharma ecosystem.
- Health systems and healthcare services could control expenses from the responsible use of OTC medicines reducing the use of prescribed medicines and visits to the doctors.
- Under the guidance of the pharmacist, consumers are more informed about OTC, recognize easier the symptoms of mild issues and choose the right medicines to deal with daily mild health problems.
- Self-care and self-medication is also a field of entrepreneurship and investment for the pharmaceutical industry.

Thank you!

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