

Pharmaceuticals: The Consumer - US - January 2013

Report Price: £2467 | \$3995 | €3108

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"The pharmaceuticals industry continues to grow; however, changes to the healthcare landscape from the ACA as well as patent expirations will affect future sales."

– Emily Krol, Health and Wellness analyst

In this report we answer the key questions:

- How will the Affordable Care Act (ACA) impact sales of pharmaceutical drugs?
- How do payment plans at pharmacies affect sales of prescription remedies?
- How will the "patent cliff" affect the pharmaceuticals market

The pharmaceuticals industry continues to grow at a healthy rate. According to data from IMS Health, U.S. category sales increased from \$308.6 billion in 2010 to \$319.9 billion in 2011. The category is expected to continue growing, thanks to an aging population and higher obesity levels which can lead to various diseases.

Despite solid growth, the pharmaceutical industry faces several challenges, such as expiring patents, more alternatives to medication, and consumers increasingly looking for ways to save on healthcare. Additionally, much of the sales growth can be attributed to price increases, rather than increased purchases.

This report explores these challenges and offers marketing solutions to pharmaceutical companies based on consumer attitudes. Readers of the report will learn about the top-selling and most-used pharmaceutical drugs, as well as strategies to consider when drugs lose their patent.

Consumer attitudes toward pharmaceutical advertisements are explored, as well as what these insights mean for the industry. Also presented are self-reported consumer behaviors regarding prescription drugs, OTC products, and generic drugs. Readers will gain an understanding of how various demographics treat non-life-threatening conditions, and what treatment solutions appeal to them.

As the pharmaceutical industry plays a major role in the U.S. economy, makers and marketers of these products will seek to continue the upward trend.

Consumer research for this report focuses on use of and attitudes toward nonessential medications. For the purposes of this report, nonessential medications include those in which the indication or illness is not life threatening. The decision to take the medication is voluntary.

Types of medication that will be covered are those for insomnia, allergies, depression, herpes, weight loss, erectile dysfunction, snoring, and migraines. Medications for cosmetic use (such as for hair loss or wrinkles) will also be covered in the report.

Sales and market share data include all prescription drugs.

This report builds on the analysis presented in Mintel's *Pharmaceuticals Consumer—U.S., March 2011*, as well as the January 2010 and February 2008 reports of the same title, in addition to Mintel's *Attitudes to Health and Pharmaceuticals—U.S., January 2005* and the February 2003 report of the same title.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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