



# Tamiflu® Awareness, Trial & Usage

Provider-Driven  
Growth Recommendations

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## **Data Table Summaries**

Table 1 - Infectious disease (ID) specialists report treating significantly more influenza patients during flu season compared to emergency room (ER) doctors.

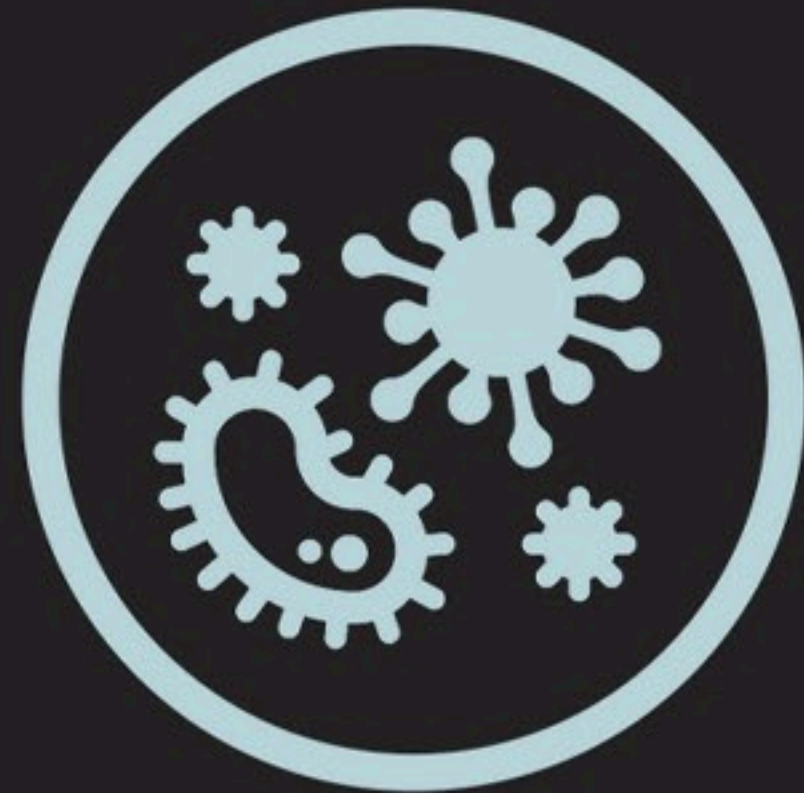
Table 2 - All brands have moderate recognizability and use across the board, with the exception of Tamiflu, which almost all doctors surveyed were aware of and used as treatment. The subsets of this table indicate that ID doctors having significantly more awareness of brands than ER doctors.

Table 3 - ID doctors have significantly more favorable impressions of all brands, generally by a difference of about 20%.

Table 4 - ER doctors are concerned with the convenience of treatment medium, whereas ID doctors are concerned with early treatment, compliance, and significantly prefer IV treatment mediums to oral ones. Both groups are concerned with the impact of flu outbreaks on work environments and the development of new treatments.

# A Look at Physician Responses

We surveyed 175 doctors - 100 specializing in emergency medicine, 75 in infectious disease - about their use and impressions of different influenza treatments.



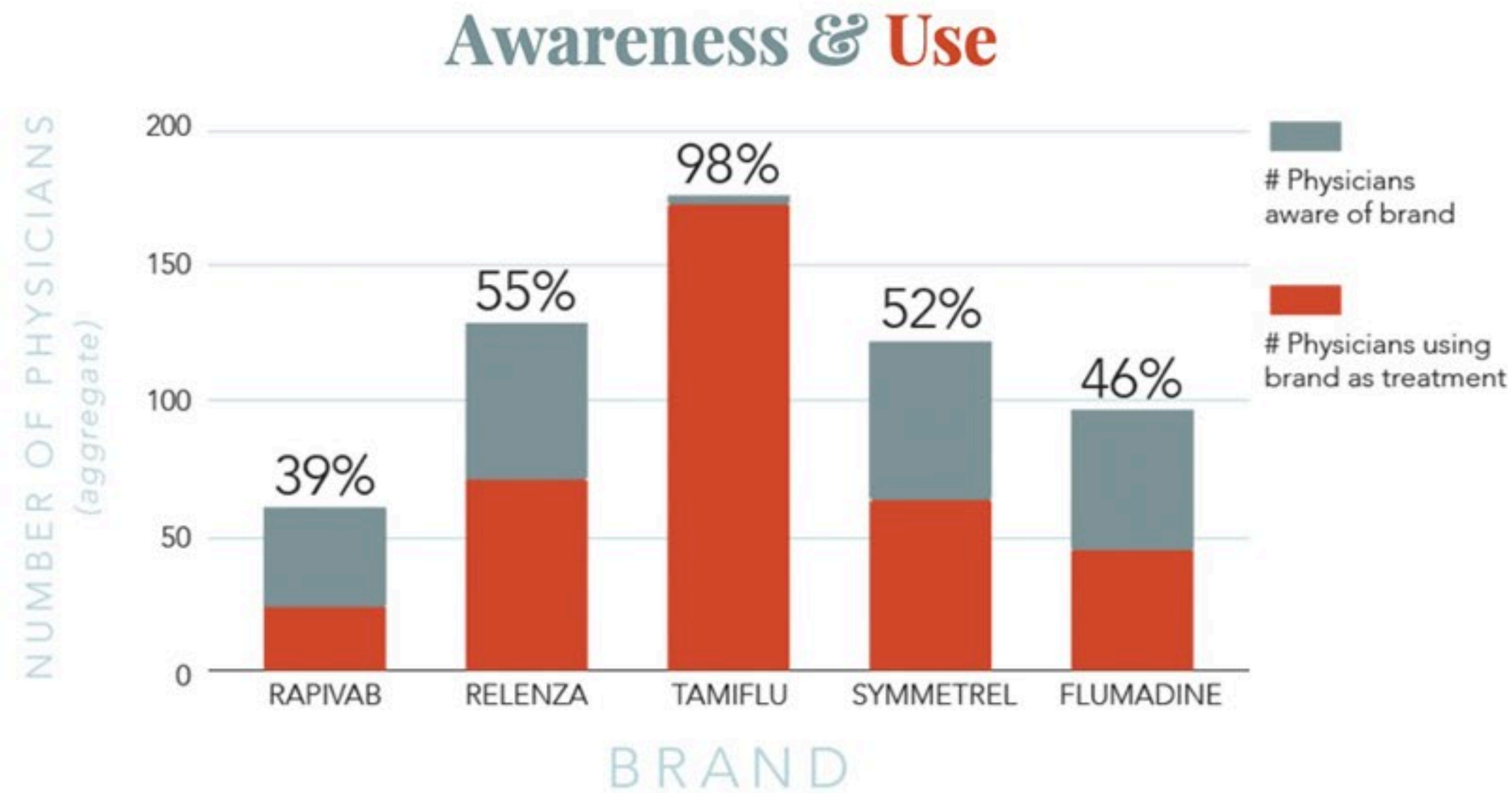
Infectious Disease (ID) doctors reported seeing **226** influenza patients on average during flu season...



...while Emergency Room (ER) doctors reported seeing significantly fewer - about **141** flu patients.

# Rapivab Relenza **Tamiflu** Symmetrel Flumadine

Each brand had moderate recognizability and usage across the board, **Tamiflu®** being the most broadly recognizable and widely used as treatment by both ID and ER doctors.



When the data is stratified by specialty, ID doctors had significantly more pharmaceutical brand awareness than their ER doctor counterparts.

ID doctors had more favorable, positive impressions of all influenza treatment brands across the board (a significant finding in all but one brand, Rapivab). The highest positive impression rate among the data was ID doctors' overall impression of **Tamiflu®**.

## ID & ER Doctors' Impression of Tamiflu®





Doctors in both specialties were in agreement over the negative impact of influenza outbreaks on work environments and the importance of developing new treatments.



ER doctors were concerned with efficiency and convenience, showing no bias against oral medication, but significantly disfavoring intravenous treatments (IV) that take a long time to administer.



ID doctors were concerned with treating influenza quickly and patient compliance to treatment regimens. They showed a willingness to try new products and significantly favored IV treatments over oral medication.

# Recommendations

The pillars of this dataset are:



Because **Tamiflu®** is already the most used and recognized brand in the survey, we can look to the ways consumer attitudes diverge giving us two routes to approach growth.

## Address ID Doctors Pain Points

ID doctors see significantly more flu patients every year compared to ER doctors and are advocate consumers willing to try new products. Improving their perception hinges on addressing ID doctors' biggest pain point: oral medication (significant preference for IV treatment).

- Address *ease of use* for Tamiflu®'s oral medication OR
- Invest in the *development of an IV treatment*
- Improve product through the lens of *compliance* and *early treatment*, two aspects of healthcare delivery this demographic values

## Target ER Doctors for Favorability

Looking at favorability statistics alone, there is much more room for improvement in ER doctors' overall impressions of Tamiflu® compared to ID doctors, with only 66% of respondents reporting a positive impression of the brand, despite 99% of respondents aware of it using it as treatment.

- Improve the *administration* of the existing Tamiflu® oral medication, as ER doctors have no bias against oral medication
- Address their need for *efficient, convenient* treatment as a route to further rounding out Tamiflu®'s reputation and presence in the field

With widespread brand recognition in the medical community, the growth of Tamiflu® depends on its ability to adapt to the current needs of infectious disease and emergency room physicians by representing their shared interests in ease and efficiency of treatment administration, minimization of workplace disruption, and continued innovation of influenza treatment mediums.