

The problem with pills ...

Conventional solid dosage forms have failed to keep pace with modern consumers' evolving demands

Millions of people around the world take tablets and capsules every day, but recent data suggests that a substantial proportion find them difficult to swallow and inconvenient to take. What is it about tablets and capsules that cause some people to abstain from taking their medication? How can the pharmaceutical industry use this to its advantage in order to improve healthcare while attracting new and retaining existing consumers?

The oral administration of medicine in the form of solid tablets and capsules is widespread, as it is generally perceived to be the most practical and cost efficient method. However, a recent survey of 2,000 people across the US and Germany has revealed that over half had difficulty in swallowing tablets and capsules, representing a relatively large, untapped market segment of people unhappy with the dosage forms that are currently available.

For those surveyed, swallowing problems were primarily attributed to the tablets and capsules being too big to swallow, the fact that they can become stuck in the

throat, or because they have an unpleasant taste or odour. These issues are having a negative effect on compliance - in fact, 8% of the people reported abstaining from taking their medication altogether, rather than facing the difficulties associated with swallowing it. Of those that continued to take their medication, a portion had taken actions that would influence the effectiveness of the medicine, such as breaking up (32%) or dissolving (17%) the tablets or capsules before swallowing them.

The study also delved deeper into people's experiences with a wide range of dosage forms in an effort to understand the characteristics they value when selecting one. This included asking participants to score different dosage forms such as solid tablets or capsules, effervescent and chewable tablets, lozenges, orally disintegrating granules (ODGs) and instant drinks for factors such as convenience, ease of swallowing, taste and more. The results raised several important issues, all of which represent valuable opportunities for pharmaceutical companies to better meet needs of modern consumers.

Swallowing difficulties are not an isolated problem

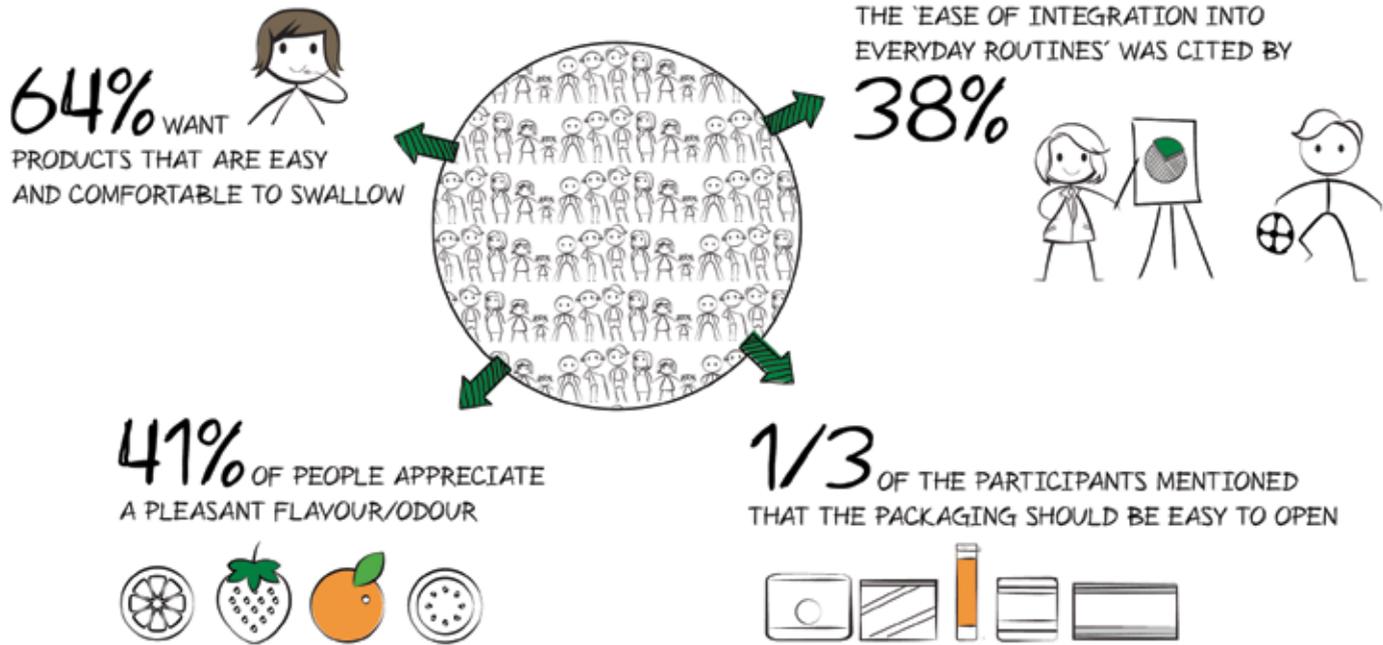
Difficulties with swallowing tablets or capsules are an issue experienced by a wide range of people regardless of age, gender or nationality. The natural tendency is to assume that problems such as dysphagia are more common in the elderly, and indeed 44% of participants aged 65 years or older reported these difficulties.

However, 70% of people aged 16-34 also reported the same difficulties in swallowing. While tablet size was an issue cited across all age groups, those in the younger category said the taste or odour of the tablet or capsule was also a contributing factor, perhaps highlighting how the Millennial generation has grown up in an era of choice (and likely expect pharmaceutical products to provide the same variety of options that they are accustomed to when choosing any other product).

An age of convenience

In an effort to better understand the needs of modern consumers, the survey asked respondents to rate the non-medicinal characteristics they value in a medication. Well over half of the participants (64%) reported that medicines should be easy and comfortable to swallow, 41% said that a pleasant taste or odour was important and 38% wanted a product that is easy to integrate into their lives. The interaction with the product itself can also affect people's experience, with a third of the participants indicating that they

'People want convenient products that taste and smell pleasant'



would prefer packaging that was easy to open. This final point provides an excellent opportunity often overlooked by pharmaceutical companies, but is well known in consumer marketing; if done well, packaging can be a powerful tool to help communicate the quality of a product to an end-user.

An emerging trend is that people want convenient products that taste and smell pleasant, are easy to swallow and can be integrated easily in their busy daily lives. Put simply, current solid dosage forms do not offer a positive experience. Companies that are willing to respond to these needs and offer people a wider range of choices have the chance to open up new market segments, capture market share and breed brand loyalty, all while successfully differentiating their own products from the competition.

The benefits of alternative dosage forms

Innovators in the industry have already begun listening to these needs, and have been looking to put consumers at the centre of their business strategy. One approach has been to develop alternative dosage forms that are more user-friendly. A large number of people are already aware of these user-friendly dosage forms: more than 90% of German survey participants were aware of chewable tablets, lozenges and instant drinks, while 85% plus of US participants knew about chewable tablets, lozenges and effervescent tablets.

It is not just awareness; people are also now beginning to try and routinely use these forms of medication. For example, the survey indicated that more than 85% of German participants had already used effervescent tablets and lozenges, while in the US more than 60% of participants had tried chewable tablets and lozenges. When asked to compare tablets or capsules with user-friendly dosage forms, people consistently scored tablets or capsules far less favourably across a number of characteristics including ease of swallowing, sensation in the mouth, package opening and ease of intake. This data suggests that, not only is awareness of user-friendly dosage forms significant, people also appear to genuinely prefer using them.

Turning patient challenges into opportunities for pharma

The experiences reported by those surveyed when using tablets or capsules open up several major opportunities for pharmaceutical manufacturers. By turning to user-friendly dosage forms, pharmaceutical companies will be better meeting the needs of the consumer. Improving ease of swallowing, as well as providing a variety of flavour options, are both direct responses to the preferences highlighted in the survey and are important in the marketplace. This is also a great opportunity to improve packaging, which can be integral for enhancing both

'The Millennial generation has grown up in an era of choice'

user-experience and acceptance of a new product. These alone are a powerful means of winning and maintaining a strong customer-base.

Acknowledgment of a range of consumer requirements allows for substantial market segmentation around dosage form type and flavour - something relatively untapped right now. For example, this could include catering specifically to a particular age group with a documented preference for one form of user-friendly dose, or simply highlighting how a product like ODGs is ideal for the busy, modern consumer.

This is the perfect time to implement a customer-centric approach. People are becoming increasingly more involved in the purchasing process, informing themselves about the options available using the internet, and then requesting specific medications from their doctors. Recognition of consumer needs is also likely to be particularly important in the over-the-counter (OTC) medicine market, which could surpass \$106bn globally by 2017¹, as consumers directly choose their preferred medications when visiting pharmacies and supermarkets.

Meeting expectations

Conventional solid dosage forms like tablets or capsules are failing to meet many of the demands of modern consumers. By better understanding and addressing the needs of today's patients, innovative pharmaceutical companies can provide patients with the characteristics they expect in a medicine, improving compliance and boosting revenues.

¹Statistics on OTC Use (2015) CHPA <http://chpa.org/marketstats.aspx>



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