



Consumer Healthcare Products Association

Understanding Trust in OTC Medicines: Consumer and Healthcare Provider Perspectives



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Released March 6, 2013

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- Executive Summary
- Research Plan and Survey Design
- Key Findings: Consumers
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CHPA Wishes to Understand the Drivers of Trust in OTC Medicines Across Various Constituencies

- The Consumer Healthcare Products Association (CHPA) launched the ***Your Health at Hand*** initiative to underscore the value and solutions OTC medicines provide to American families, to healthcare providers, and to the U.S. healthcare system overall.
- In support of that initiative, CHPA is interested in conducting research to examine what builds trust in OTC medicines across key audiences:
 - Consumers
 - Physicians
 - Pharmacists
- **Key Research Objectives:**
 - What drives trust in OTCs among consumers and healthcare professionals?
 - How do trust drivers in OTCs differ between consumers and professionals?
 - How do trust drivers differ by key consumer and professional groups?

Survey Respondent Snapshot

- Surveyed adult consumers of all ages regarding 12 types of conditions; doctor visits ranged from 0-10 times per year.
- Consumer respondents included households (HHs) with the following demographics:
 - HHs with kids <4
 - HHs with kids 4-11
 - HHs with kids 12-17
 - Multi-generational HHs
 - Respondents <65
 - Respondents aged 65+
 - Those who care for an adult outside of home
- Healthcare professional (HCP) respondents included:
 - Primary care physicians (PCPs)
 - Nurse practitioners (NPs)
 - Pediatricians (Peds)
 - Pharmacists (Pharms)

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Executive Summary

- **Patient outcomes, efficacy** and **safety** perceptions are the most important drivers of OTC trust across consumers and various HCP segments.

- Consistency is a key theme across all segments.
- Efficacy compared to a prescription is a key dynamic between consumer, PCP, and NP.
- Four HCP segments have a very high degree of agreement.
- Trust drivers vary little across types of OTCs taken (cough & cold; allergy relief; pain medication; upset stomach OTCs).
- Pediatricians as well as consumer households with children <12 also need to know the product is safe to give to children under 18.

Works consistently
 Patient outcomes
 Efficacy
 Safety

Rank	Consumers	PCPs	NPs	Peds	Pharms
1	Working every time (9%)	Is a treatment that helps me achieve successful patient outcomes (17%)	Is a treatment that helps me achieve successful patient outcomes (23%)	Is safe to give to children under 18 (20%)	Is a treatment that helps me achieve successful patient outcomes (22%)
2	As effective as a prescription (8%)	Is something I know will work consistently (15%)	Is something I know will be as efficacious as a prescription (13%)	Is a treatment that helps me achieve successful patient outcomes (19%)	Is something I know will work consistently (14%)
3	Few side effects (8%)	Is something I know will be as efficacious as a prescription (13%)	Is something I know will work consistently (11%)	Is something I know will work consistently (11%)	Is made with ingredients that I know to be safe (12%)

Executive Summary

- HCPs feel that OTCs can relieve symptoms before or without a prescription.
 - PCPs most frequently selected the statement, “To relieve symptoms before recommending a prescription treatment.”
 - For NPs and Peds, the statements were essentially equivalent “To relieve symptoms before recommending a prescription treatment” and “To relieve symptoms without recommending a prescription treatment.”
 - Pharms felt OTCs are... “To relieve symptoms without recommending a prescription treatment.”
 - Note that “To relieve symptoms while also referring patient” is not highly rated.
- HCP views of OTCs are important, as many consumers use OTCs without seeing a healthcare professional.
 - 84% of consumers say they trust their doctor’s advice on what OTC medicine they should take or give to others.
 - Households with kids <12 are less likely than other households to use OTCs without a doctor’s visit, but most households with kids <12 are still using OTCs without a doctor’s visit.
- Consumers were more likely to say they have readily used allergy relief OTCs for symptom relief compared to other OTCs.
 - Respondents were more likely to **occasionally** use the remaining OTC segments to alleviate symptoms.
 - Seasonality may influence these results as the survey was fielded during Hay Fever season.
- About 98% of PCPs, NPs, and Pharms and 90% of Peds reported that:
 - They either “have no reservations recommending OTC medication to patients and caregivers” or “recommend taking OTC medication and encourage caregivers and patients to read and carefully follow instructions.”

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Survey Design – Overall and HCP Respondents

- The research plan addresses the survey's objectives regarding trust drivers in OTC medications.
- Nielsen and IMS partnered to conduct surveys among consumers (Nielsen) and healthcare professionals (IMS) to help understand and demonstrate what drives consumers and healthcare professionals to trust OTC medications.

Healthcare Professionals:

- Approximately 10 minute online survey among 506 healthcare professionals.
- Results were analyzed among key groups:
 - Primary care physicians (n=125)
 - Nurse practitioners (n=126)
 - Pediatricians (n=129)
 - Pharmacists (n=126)
- IMS used its prescription database to identify high volume healthcare professionals for recruitment.

Survey Design – Consumer Respondents

- 1,500 households (HHs) that recorded purchases of OTC products on Nielsen's Homescan Panel in the previous 52 weeks were invited to participate in a survey about OTC products.
 - Survey was available 8/20/12 – 9/10/12.
 - The primary shopper was asked to complete the survey for all members of the HH.
- 1,194 respondents completed the survey. 82% of the respondents confirmed that they purchased OTC products in the past 6 months.

Consumer survey responses were analyzed among respondents who fall into the following groups:

- Pain relief medication given/taken yielding 461 responses
- Cold, cough, sinus or flu medications given/taken yielding 158 responses
- Allergy relief medications given/taken yielding 183 responses
- Upset stomach/acid reflux/antacid medications given/taken yielding 129 responses
- Medication taken by respondent yielding 658 responses
- Medication given to child/step-child in the home yielding 273 responses
- Households with Kids<4 yielding 60 responses
- Households with Kids 4-11 yielding 158 responses
- Households with Kids 12-17 yielding 130 responses
- Multi-Generational HHs yielding 39 responses
- Hispanic yielding 65 responses
- Non-Hispanic yielding 1,129 responses
- Respondents <65 yielding 778 responses
- Respondents Aged 65+ yielding 196 responses
- Care for Adult Outside of Home yielding 343 responses

Assessing Consumer and HCP Trust in OTC Medicines

- Both survey designs measure relative importance of potential trust drivers.

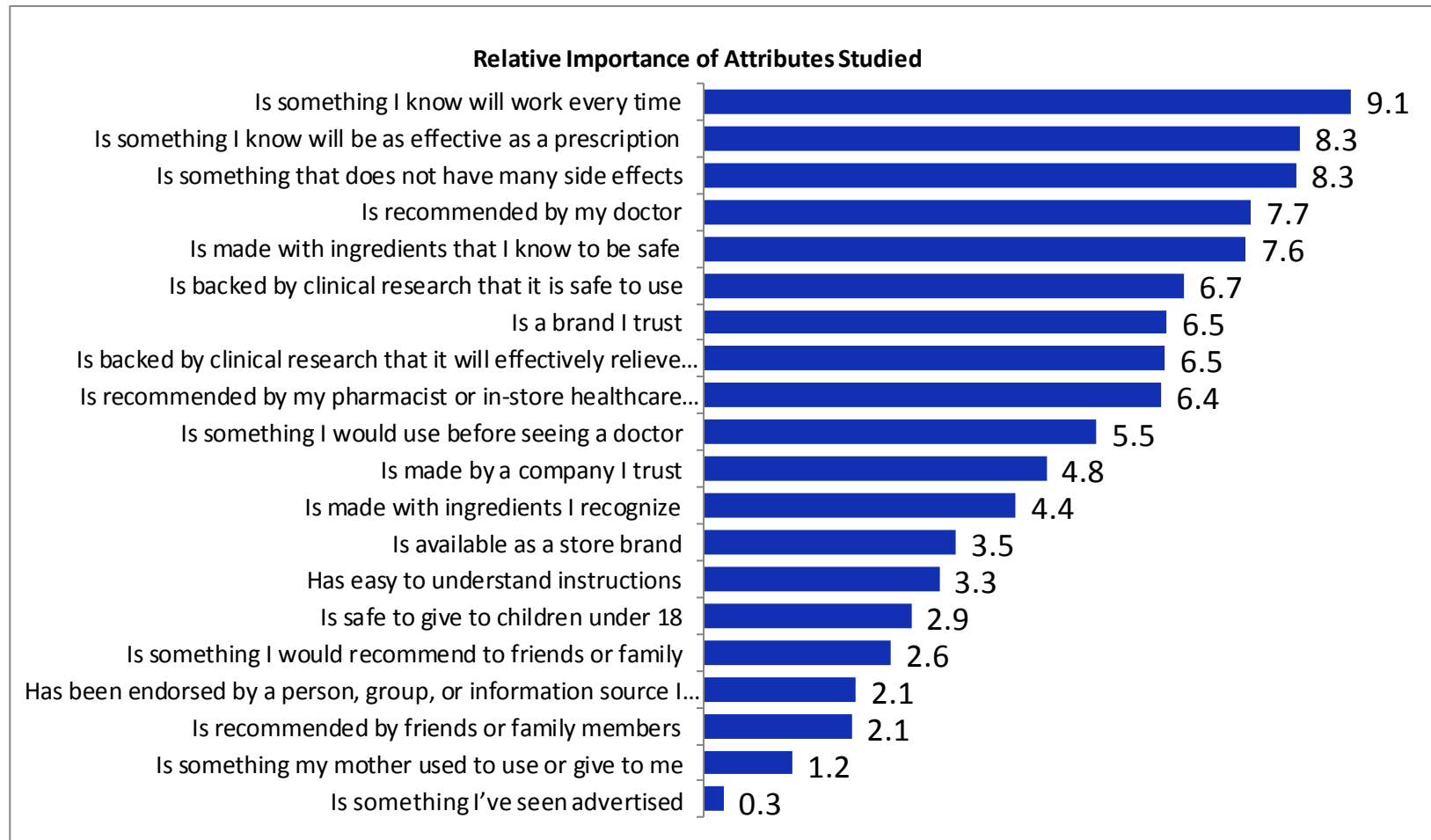
Respondents answered approximately five minutes of profiling questions, followed by approximately five minutes of an exercise where they looked at 12 sets of four attributes that were repeated in different patterns to result in an overall ranking of 20 trust attributes.

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Efficacy and Safety Perceptions Are the Most Important Drivers of OTC Trust

Working every time, as effective as a prescription, few side effects, doctor recommended, and safe ingredients are the most important pillars of consumers' trust.



Q10. Which of the following is most important and which is least important when you decide which <MEDICATION> that are available over-the-counter you trust taking (giving to your child/step-child)?

Trust Pillars Are Similar Across the Four OTC Categories

Safe for children <18 is more important for Cough & Cold and Allergy Relief, but differences are not significant.



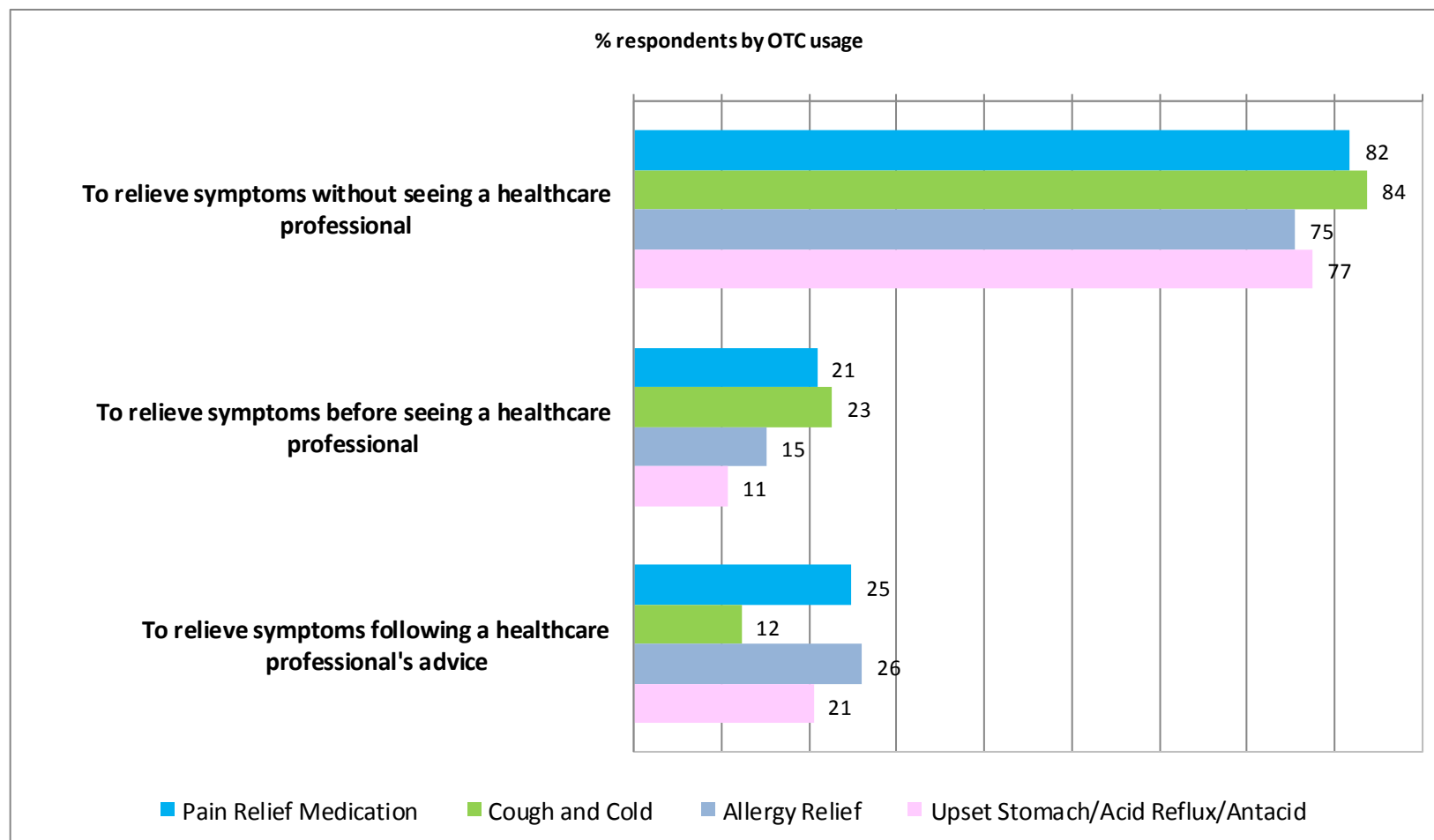
Q10. Which of the following is most important and which is least important when you decide which <MEDICATION> that are available over-the-counter you trust <taking/giving to your child/step-child>?

Consumer Trust Attribute Insights by Demographic Category

- For **HHs with children under 4 years-old**, the **most important** trust attribute in deciding which OTC medication to take or give to a child is that the medication is **recommended by their doctor**.
- When choosing a **medication for themselves**, survey respondents choose a **brand they trust**.
- **Multi-generational HHs, Hispanic HHs, and HHs who care for an adult** outside of their home place a high value on **pharmacist or in-store healthcare professional** recommendations.
- **Multi-generational HHs** trust products with **easy-to-understand instructions**.
- **HHs with children under 0-17 years-old** want to know the **product is safe** to give to children under 18 years-old.

Q10. Which of the following is most important and which is least important when you decide which <MEDICATION> that are available over-the-counter you trust taking (giving to your child/step-child)?

Consumers Use OTCs to Relieve Symptoms without Seeing a Healthcare Professional



Q8. When have you or others in your household used each type of over-the-counter medication? Please select all that apply for each type of medication.

Sample Size = 969

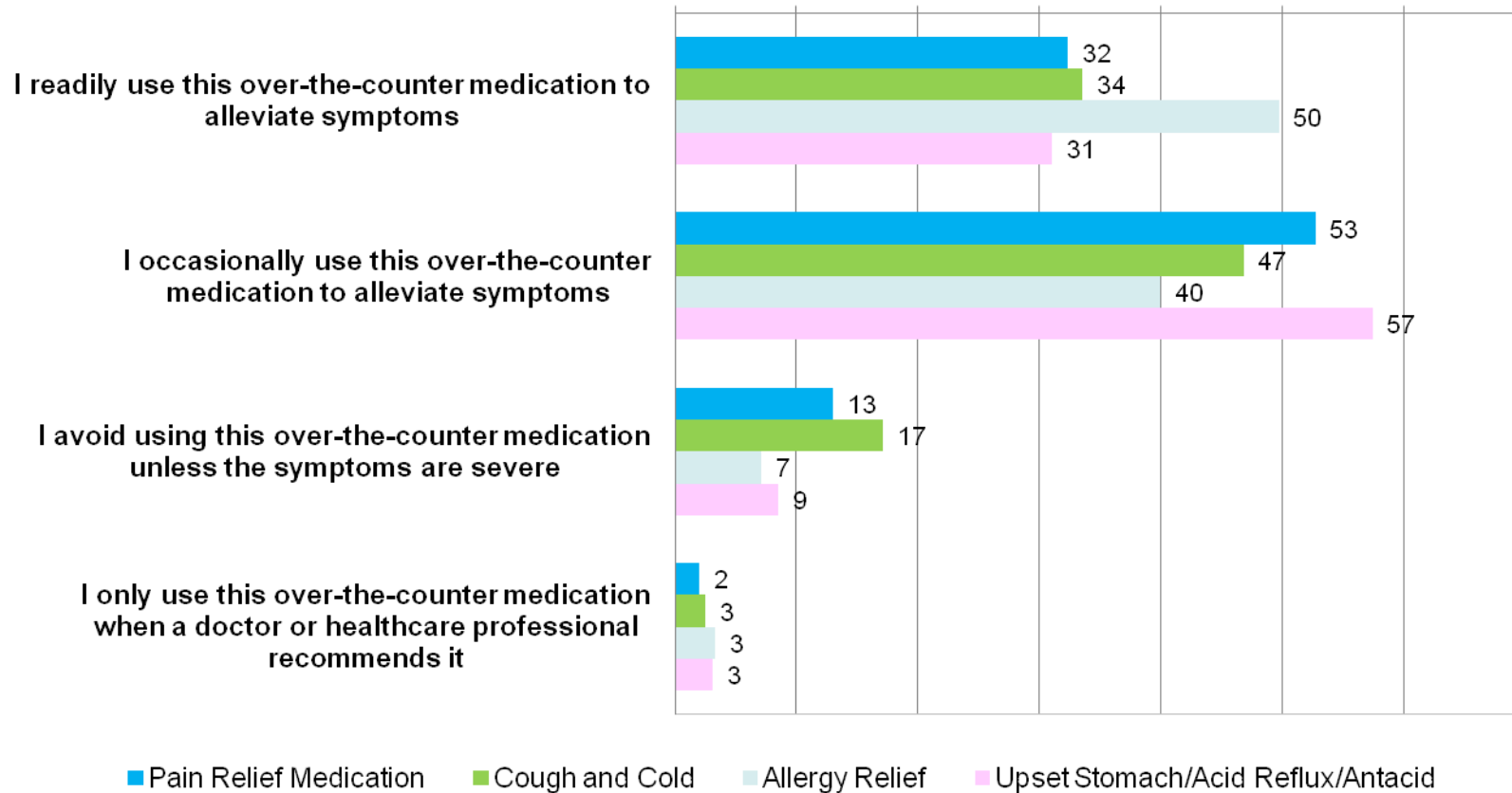
OTC Use with a Visit to a Healthcare Professional is More Likely to Occur in Households with Younger Kids

- Households with **children under 4 years-old** are more likely to use OTC medicines to **relieve symptoms before seeing a healthcare professional**.
- However, households with **children under four years-old** are more likely to see a **healthcare professional for relief from symptoms** of colds, flu, fevers, or coughs (versus other consumers).
- Households with **children ages 4-11 years-old** are more likely to use OTC medicines to **relieve symptoms before seeing a healthcare professional** and/or **following a healthcare professional's advice**.

Q8. When have you or others in your household used over-the-counter medication? Please select all that apply.

More Consumers Readily Use Allergy/Relief OTCs than Other OTCs

% respondents by OTC usage



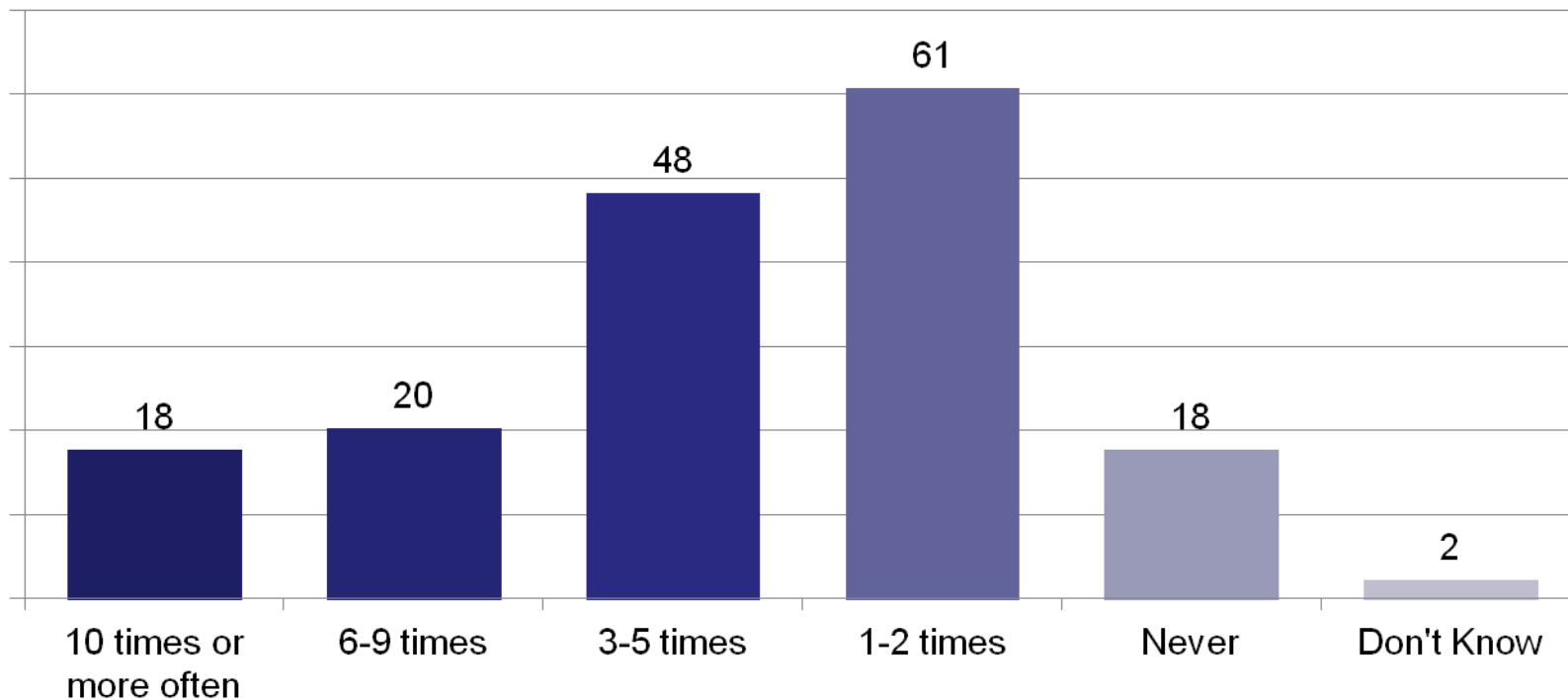
Q9. Which statement below best describes how you feel about medications that are available over-the-counter?

Sample Size = 931

Most Consumers Visit HCPs 1-2 Times per Year

Q6. For each household member, please answer the following questions: Frequency of visiting any type of doctor or healthcare practitioner in the past year

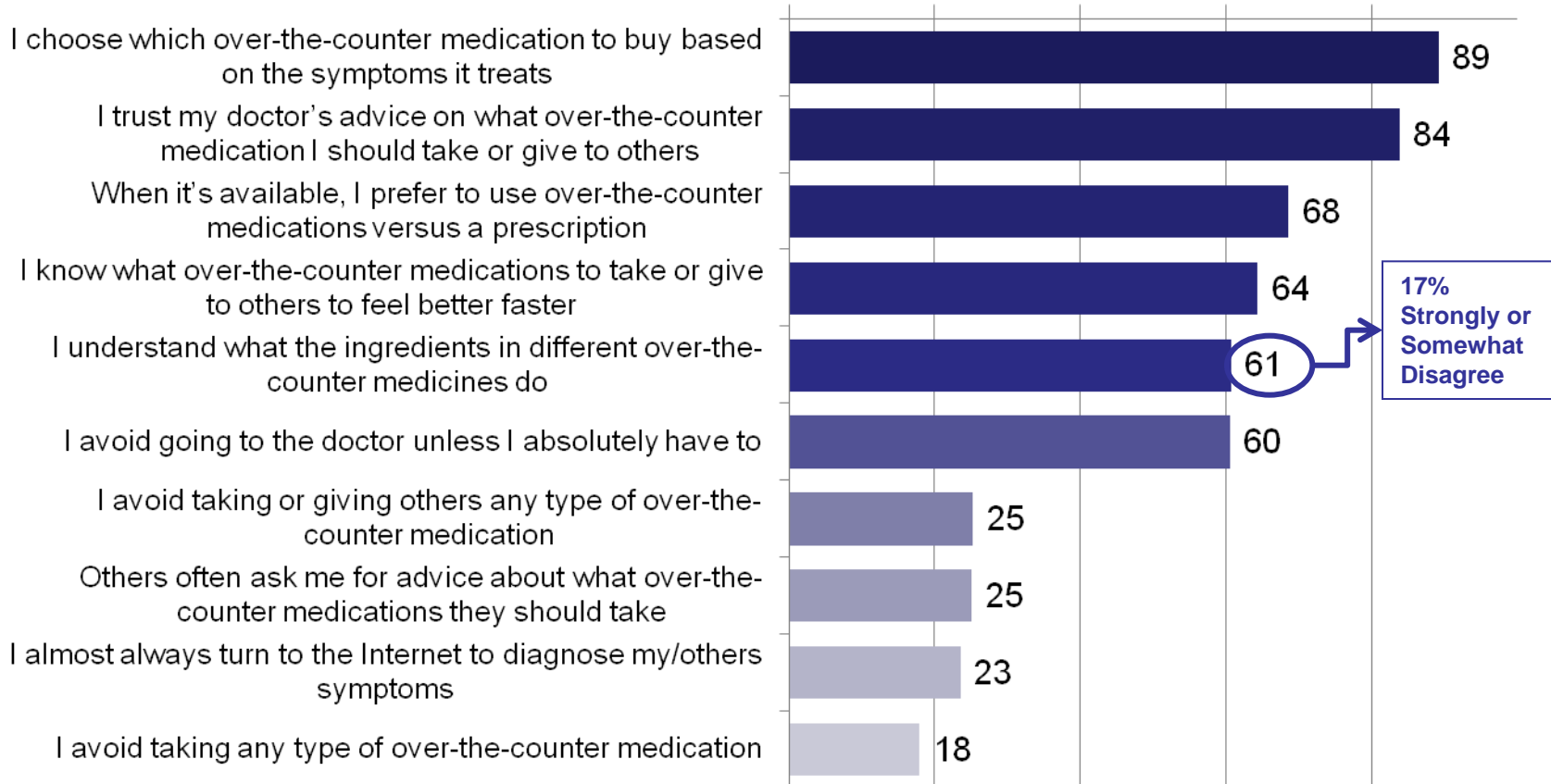
% of respondents



Sample Size = 974

Most Consumers Buy Based on Symptoms and Trust Their Doctor's Advice on OTCs

Top 2 Box Summary - % of respondents who Strongly Agree/Somewhat Agree



Sample Size = 974

Q12. Below are statements that may or may not describe you. We would like to know how much you personally agree or disagree with each statement.

Older Consumers Are More Likely to Use OTCs Based on a Healthcare Professional's Recommendation

Respondents who were **over 65** years-old were more likely to use OTCs when **recommended by a doctor or healthcare professional.**

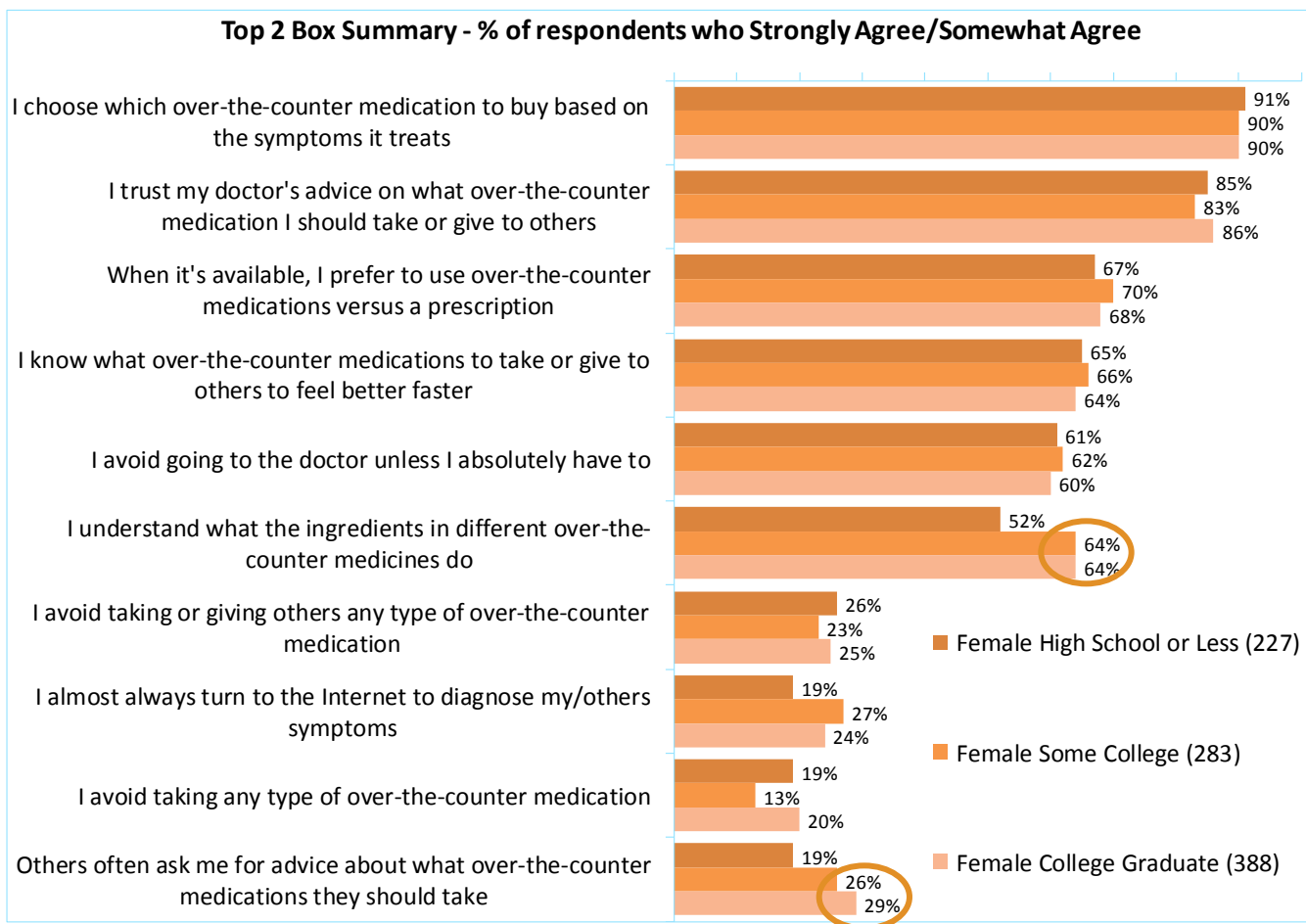
Q9. Which statement below best describes how you feel about medications that are available over-the-counter?

Respondents with Kids Are More Likely to Use the Internet for Diagnosis

- Respondents were most likely to **“almost always turn to the Internet to diagnose my/others symptoms”**:
 - When the medication is taken by child
 - Households with children under 4 years-old
 - Households with children under 12 years-old

Q12. Below are statements that may or may not describe you. We would like to know how much you personally agree or disagree with each statement.

Higher Education Levels Lead to Better Understanding of Ingredients and Being Asked for Advice

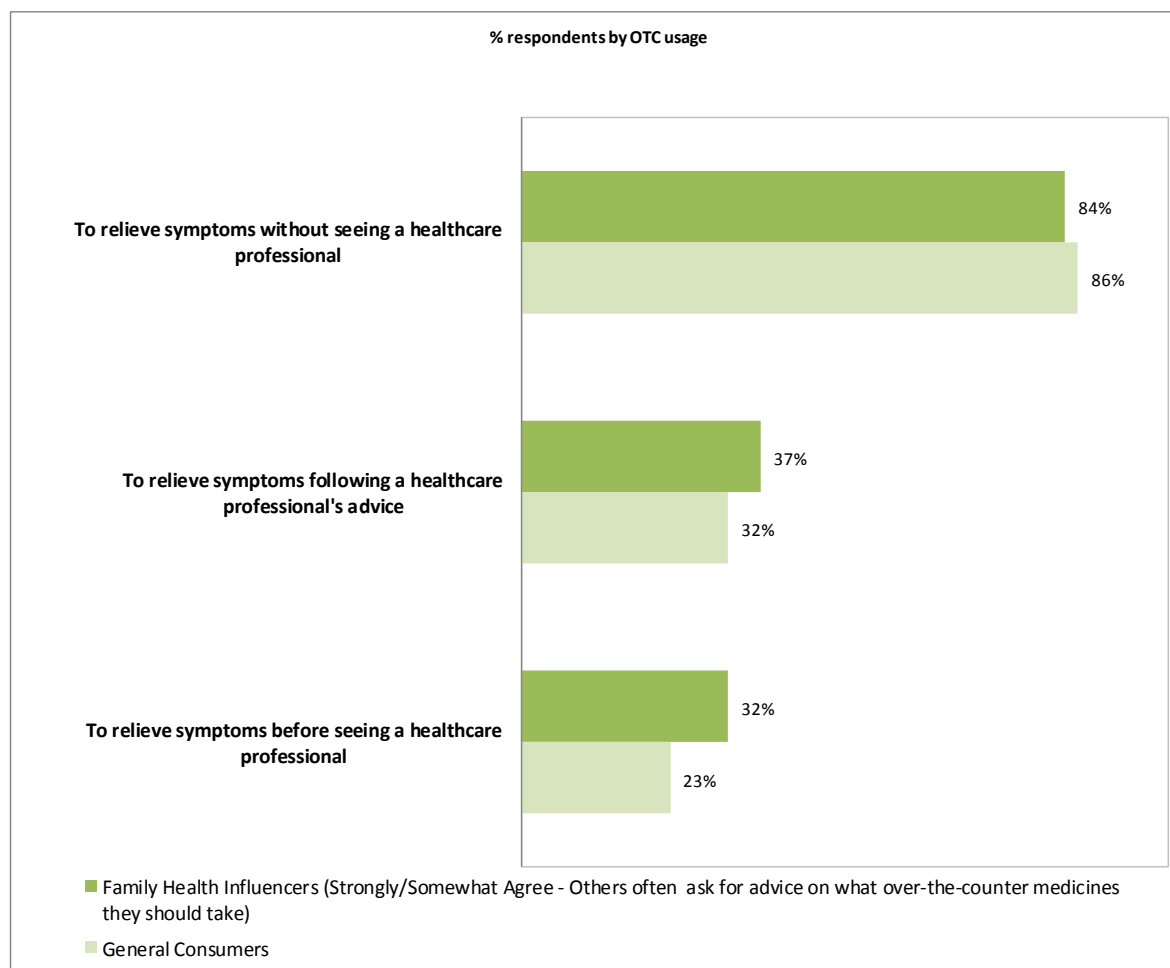


Q12. Below are statements that may or may not describe you. We would like to know how much you personally agree or disagree with each statement.

Sample Size = 974

Family Health Influencers are more likely to use OTCs before seeing a healthcare professional or based on a healthcare professional's advice

Q8. When have you or others in your household used each type of over-the-counter medication? Please select all that apply for each type of medication.

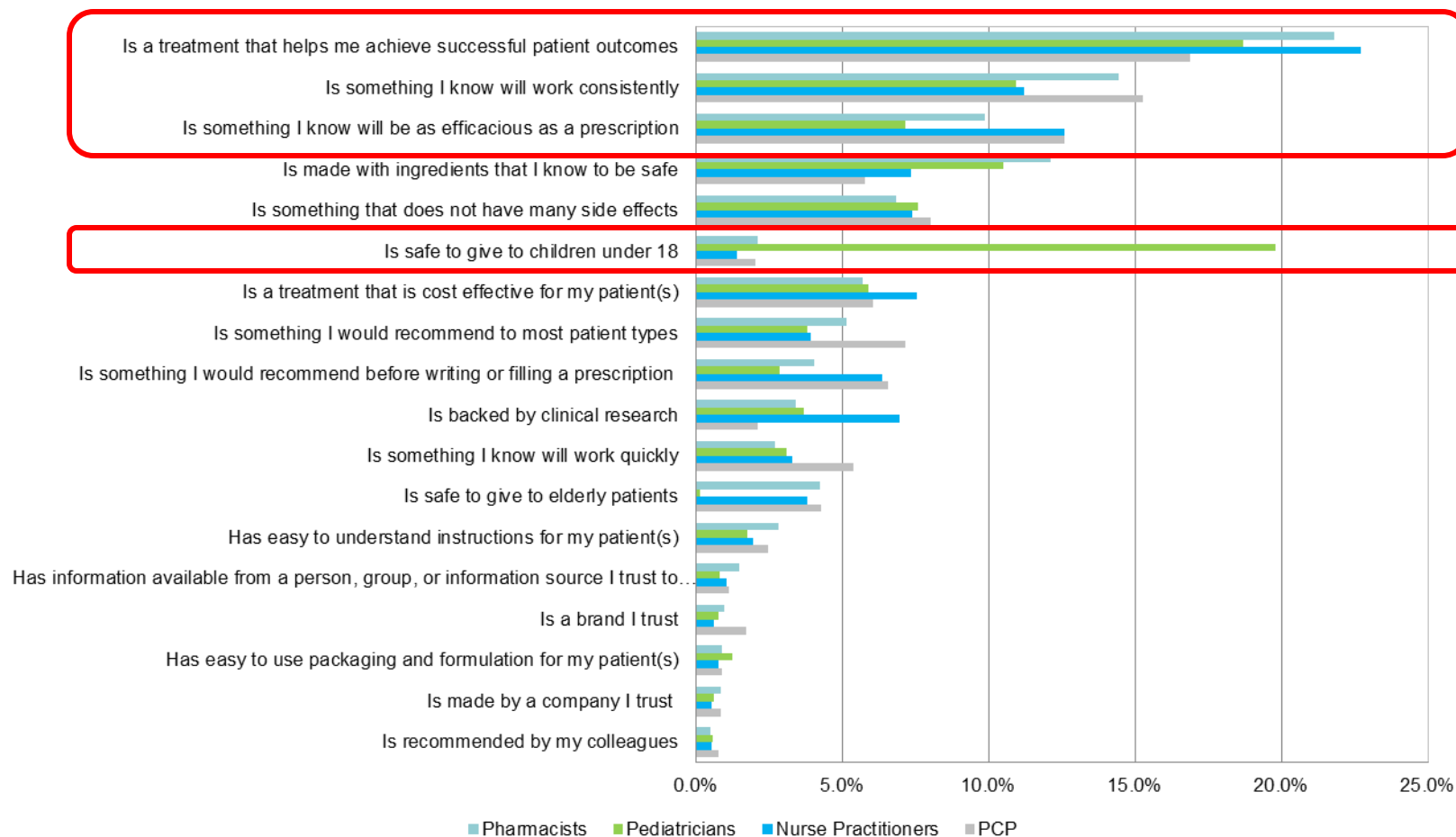


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Successful Patient Outcomes, Consistency and Efficacy Were the Top 3 Trust Attributes Rated by Most HCPs

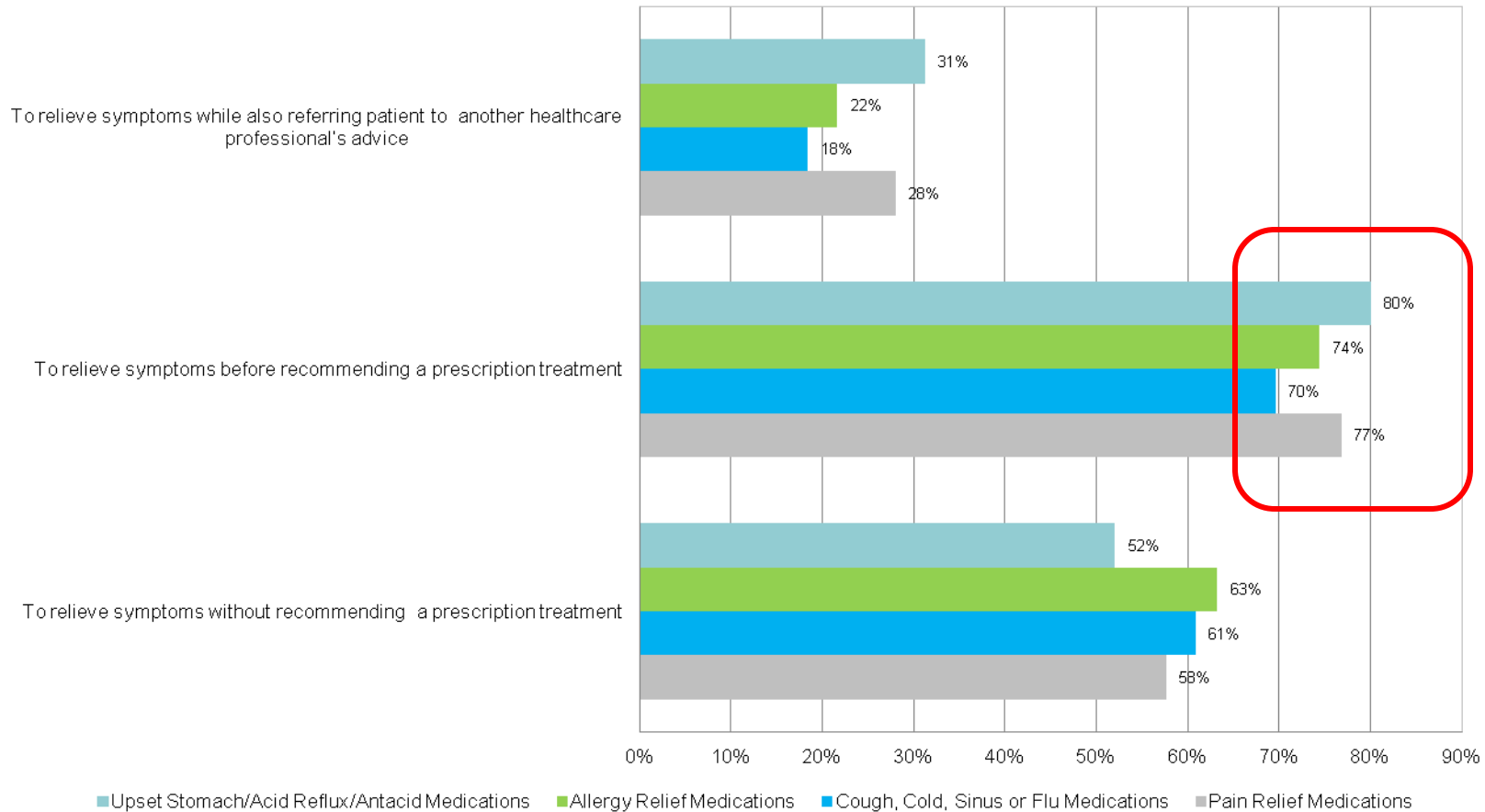
% respondents by trust attributes for HCP types studied



Q6. Which of the following attributes (listed above) is most important and which is least important when you decide which OTC Medication you trust to give to yourself or others in your household?

PCPs Largely Recommend OTC Medications to Relieve Symptoms Before Recommending a Prescription Treatment

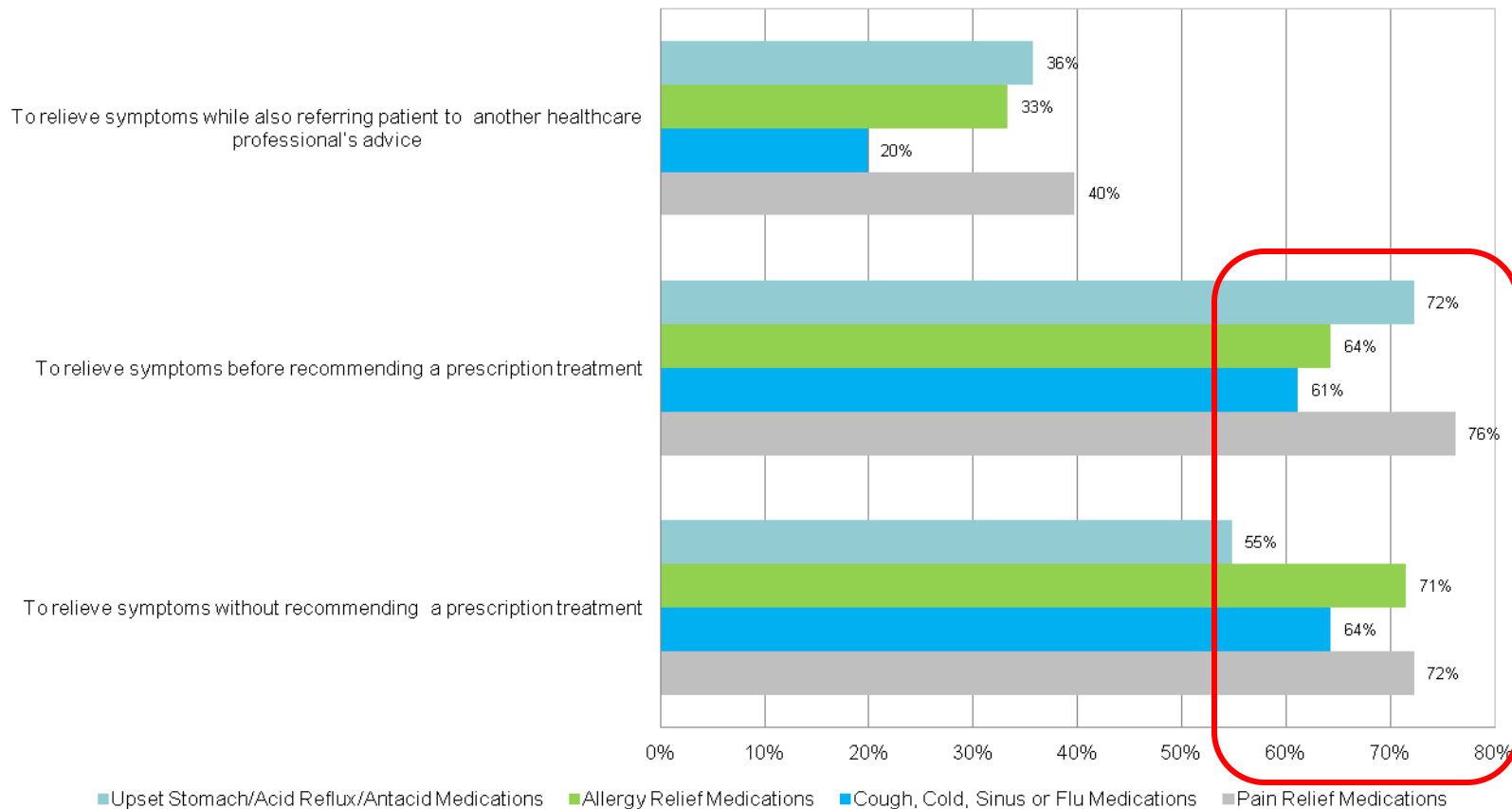
% respondents by OTC recommendations for medication groups studied



Q4. When have you recommended each type of over-the-counter medication? A. To relieve symptoms instead of recommending a prescription treatment; B. To relieve symptoms before recommending a prescription treatment; C. To relieve symptoms while also referring patient to another healthcare professional's advice

NPs Mostly Recommend OTC Medications to Relieve Symptoms Either Before Recommending or Without Recommending a Prescription Treatment

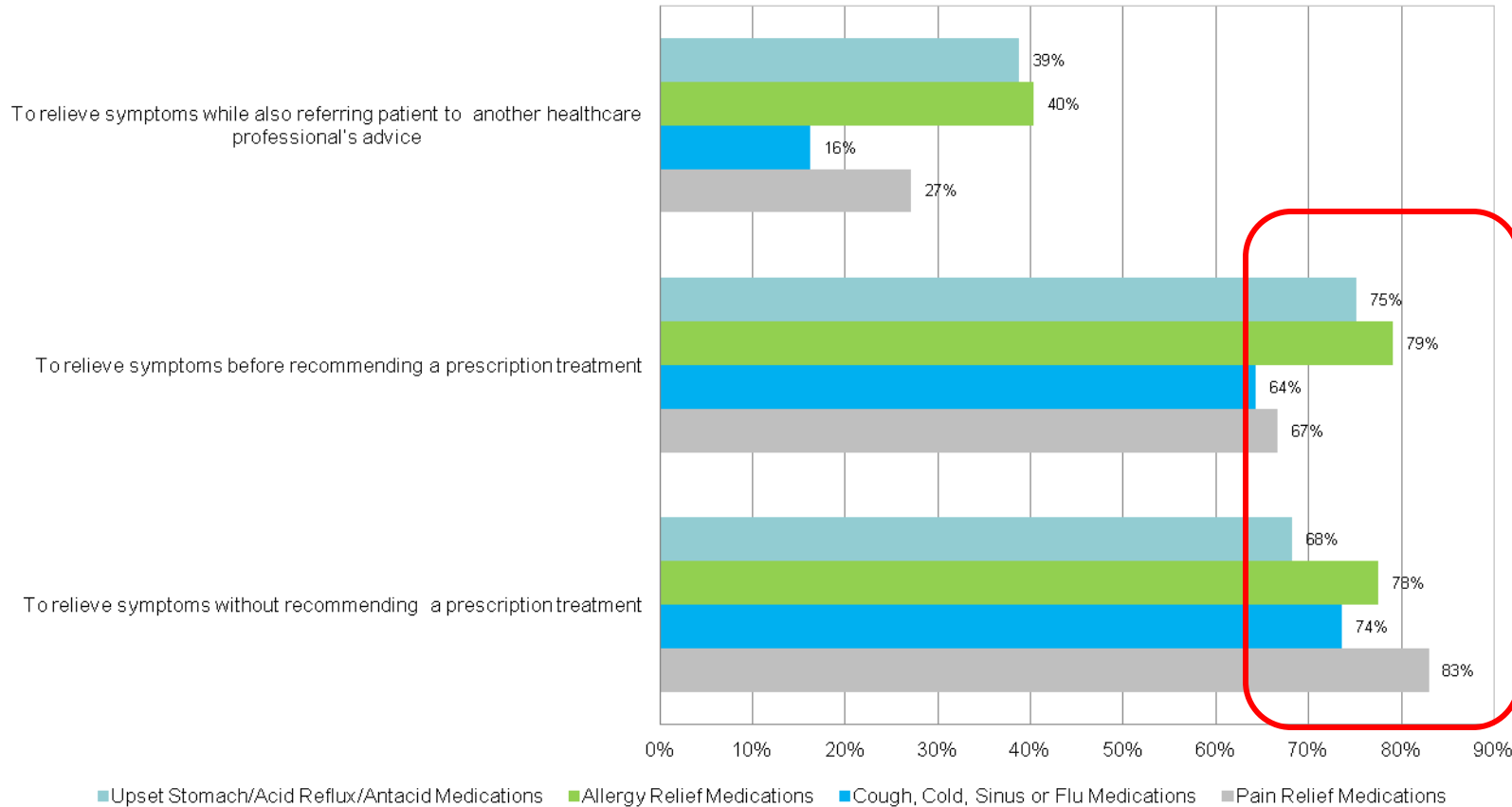
% respondents by OTC recommendations for medication groups studied



Q4. When have you recommended each type of over-the-counter medication? A. To relieve symptoms instead of recommending a prescription treatment; B. To relieve symptoms before recommending a prescription treatment; C. To relieve symptoms while also referring patient to another healthcare professional's advice

Pediatricians Mostly Recommend OTC Medications to Relieve Symptoms Either Without Recommending or Before Recommending a Prescription Treatment

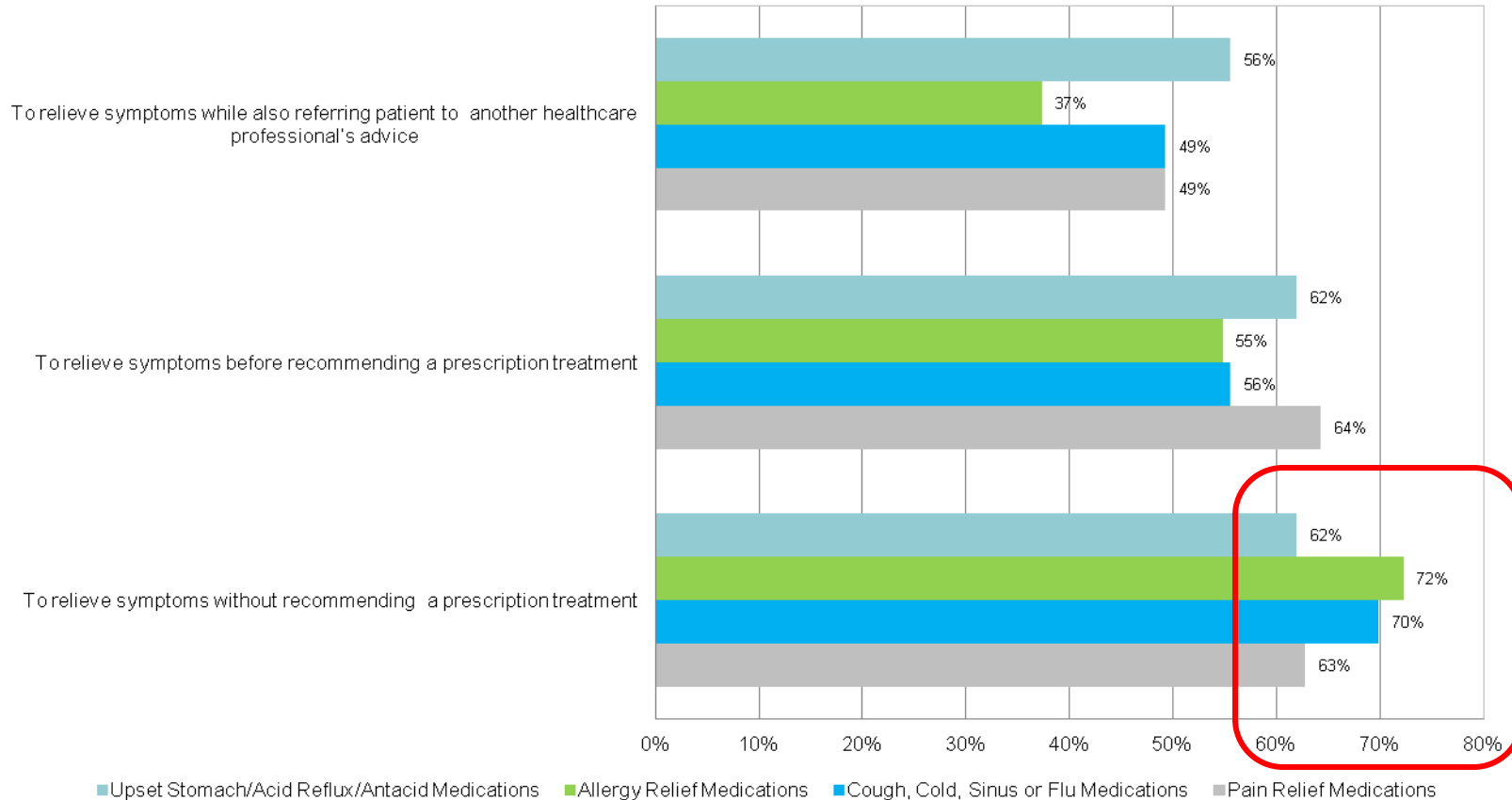
% respondents by OTC recommendations for medication groups studied



Q4. When have you recommended each type of over-the-counter medication? A. To relieve symptoms instead of recommending a prescription treatment; B. To relieve symptoms before recommending a prescription treatment; C. To relieve symptoms while also referring patient to another healthcare professional's advice

Pharmacists Recommend OTC Medications to Relieve Symptoms Either Without Recommending or Before Recommending a Prescription Treatment

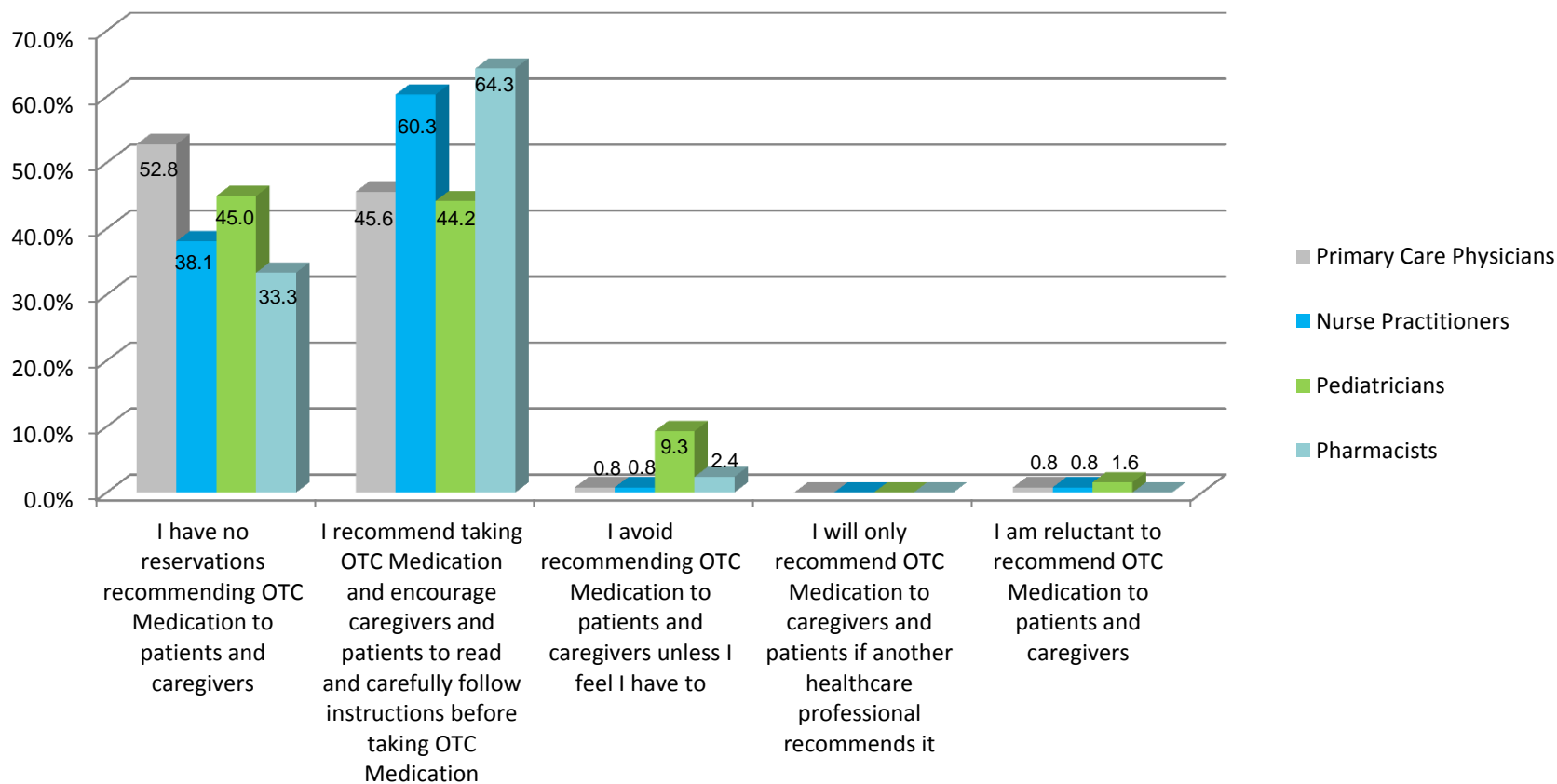
% respondents by OTC recommendations for medication groups studied



Q4. When have you recommended each type of over-the-counter medication? A. To relieve symptoms instead of recommending a prescription treatment; B. To relieve symptoms before recommending a prescription treatment; C. To relieve symptoms while also referring patient to another healthcare professional's advice

Most Specialists Either Had No Reservations Recommending OTC Medications or Would Encourage Patients to Read and Carefully Follow Instructions Before Taking the OTC Medication

% respondents describing how they feel about OTC medication that are available over-the-counter



Q5. Which statement (in the table above) best describes how you feel about OTC Medication that are available over-the-counter?

Patients and Caregivers Visit Different HCPs for Different Reasons

Healthcare Professionals

Top Reasons Consumers Visit Respondents

Primary Care Physicians
(n=125)

Asthma; Cough and Cold

Pediatricians
(n=129)

Asthma; Cold; Allergies; Routine Checkup

Pharmacists
(n=126)

Cough; Headache/Migraine; Allergies

Nurse Practitioners
(n=126)

Anxiety/Depression; Upset Stomach/
Heartburn/Digestive Symptoms; Allergies

Q11. What are the reasons that patients and caregivers have come to see you in the past year? Please select all that apply.