

# The Changing Landscape

## – A Multi-Country Study Undertaken with AESGP

Online Survey In 50 Countries  
Fieldwork March/April 2009



# Research Objective

- The Nielsen Company has partnered with The Association Of The European Self-Medication Industry (AESGP) in a global research project with the objective of better understanding consumer attitudes towards key aspects of self-care
  1. Willingness to self-medicate when feeling the onset of a minor ailment
  2. Barriers to routine self-medication when feeling the onset of a minor ailment
  3. Factors influencing product choice of non-prescription medicines
  4. Impact of current global economic slowdown on usage of Self Medication
  5. Primary route for knowledge that enables responsible usage of Self Medication products

# Research Scope & Method

- Online questionnaire in 50 countries
  - Reflects internet-connected population: key to bear this in mind when interpreting results from countries with relatively low internet household penetration
    - Note: definition of “internet-connected” is all those who have access to the internet at home and/or at work
  - Questionnaire put forward in local language (not English) where relevant
- Sample sizes
  - Approximately 500 for all countries except.....
  - Over 25,000 respondents globally
- Sample representation
  - Structured around gender and age (15+) of internet-connected population by country
    - At a global level for gender representation: male 55%, female 45%
    - At a global level for age representation: skewed to younger age groups (54% of respondents aged 15-34)
- Global and regional averages are “weighted” for internet population and are not “numeric” averages
  - See map for participating countries and regional groupings

Europe

Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, Poland, Russia, Czech Republic, Hungary, Estonia, Latvia

North America:

Canada  
USA

Latin America:

Mexico  
Brazil  
Argentina  
Chile  
Colombia  
Venezuela

Middle East & Africa:

Turkey  
Israel  
Saudi Arabia  
UAE  
South Africa

Asia Pacific

Australia  
New Zealand  
China  
Hong Kong  
India  
Pakistan  
Indonesia  
Japan  
South Korea  
Malaysia

Philippines  
Singapore  
Thailand  
Taiwan

Vietnam



# Analysis Commentary – Issues To Consider When Interpreting Results

- All interviews were undertaken on-line, with respondents self-completing the questionnaire
  - Respondents reflect the internet-connected population by country, and samples are determined by age and gender demographics
- No prompting was given to respondents – questions were answered in the way that respondents understood them
- No guidance was given to respondents about.....
  - The definition of a minor ailment
  - The definition of a non-prescription medicine
  - How many responses to give on question 3, where multiple responses were allowed
- On the following slides, the global aggregate data is provided with interpretation to act as a framework for data users
  - Whilst it is understood that data interpretation has some degree of subjectivity, it is recommended that all results are viewed as indicative of consumer sentiment and evaluated in good faith and not used as definitive proof in support of a particular issue

# Executive Summary – Main Findings From Global Results

- **Questions 1 & 2**

- When feeling the first signs of a “minor ailment”, 33% of all respondents globally indicated that they would “always” or “usually” take a medicine as soon as they started to feel unwell.
- 95% of respondents are open to the concept of taking medicines to treat minor ailments.
- Of those who usually wait to see if a minor ailment gets better before taking a medicine or never take a medicine, 47% consider that taking medication can be harmful. This perception may be a barrier to self care; it also indicates, however, that there is a high level of awareness of the importance of using all medication safely and with respect for the instructions.
- Only a small number of those who usually wait to see if a minor ailment gets better before taking a medicine or never take a medicine, consider access, price or efficacy to be a reason for not taking a medicine.

- **Question 3**

- Safety and efficacy are the most important product choice attributes that consumers have globally for non-prescription medicines.
- A number of attributes form a secondary core to purchase choice, including the advice of the pharmacist, speed of action and issues around confidence, loyalty and trust

# Executive Summary – Main Findings From Global Results

- **Questions 4 & 5**

- 46% of consumers globally claimed that their usage of non-prescription medicines would change in the coming year as a result of the global financial crisis
- Of those agreeing that their usage would change, the main ways this would manifest itself was in less frequent use of the products and a move to usage of more natural & traditional remedies
- Only 6% of those agreeing that their usage would change indicated that they would stop buying the products.

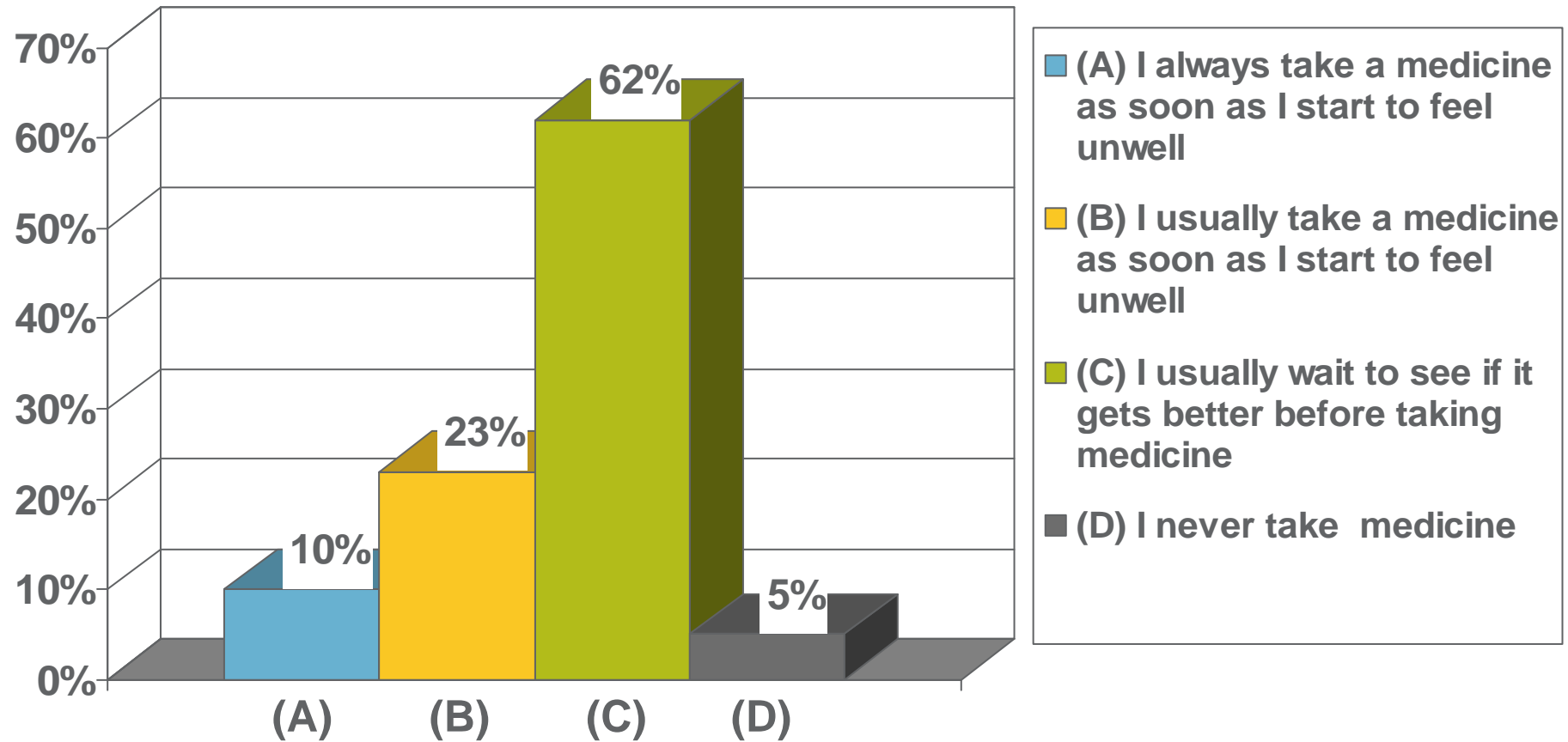
- **Question 6**

- There is no clear global consensus from consumers on the way in which they ensure safe and responsible usage of medicines
- A three way split of opinion exists across reading the product information leaflet, reading the on-pack instructions and asking the pharmacist

- **All questions**

- The global averages clearly mask the local country-specific similarities and differences
- Local regulatory frameworks, distribution policies and other environmental factors influence consumers, and these should be borne in mind when interpreting all results from this research

# Q1. When you feel the first signs of a minor ailment starting, which of the following applies to you? 50 Country Global Average



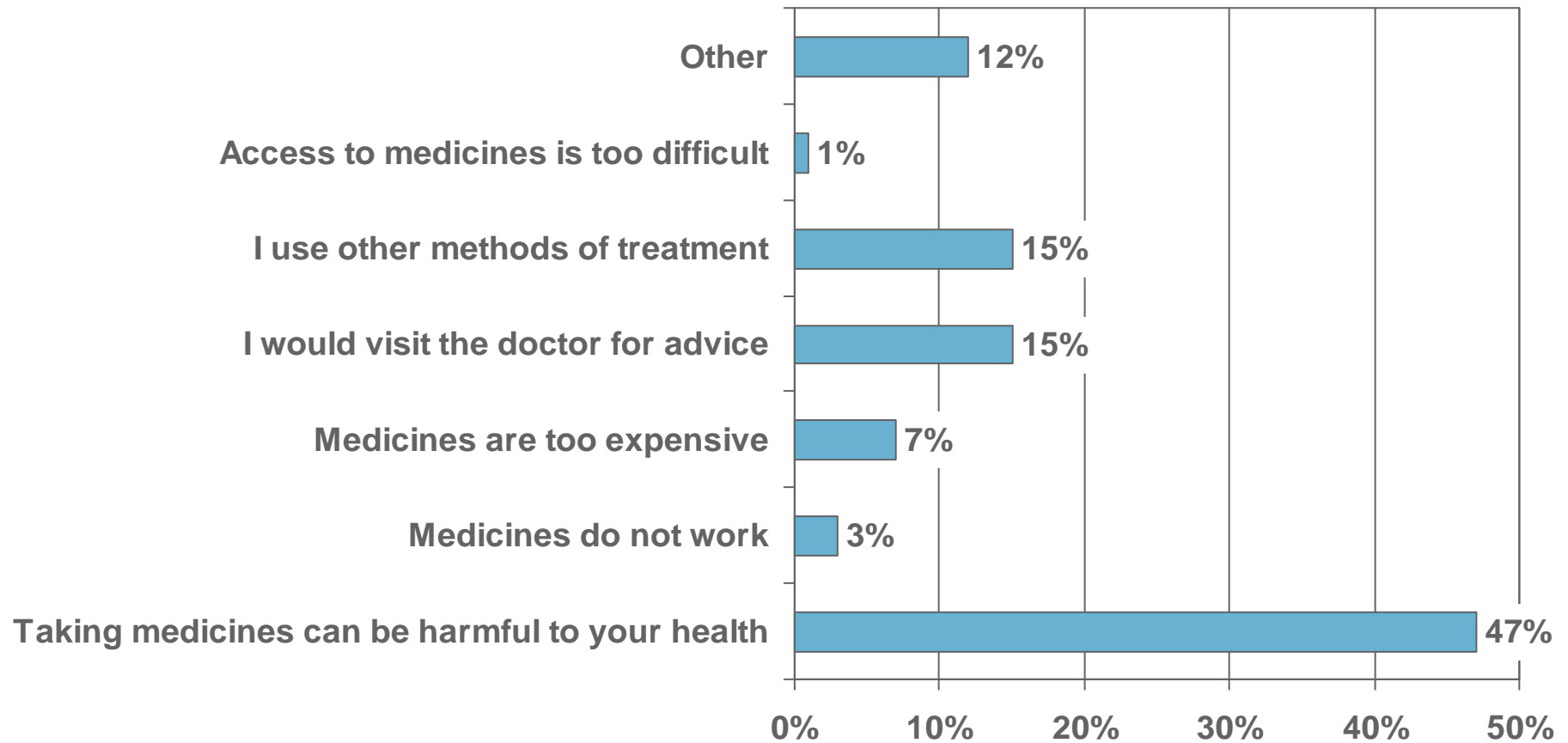
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents globally



Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine?

*Note: Question asked only to those responding to question 1 with response C or D*

50 Country Global Average



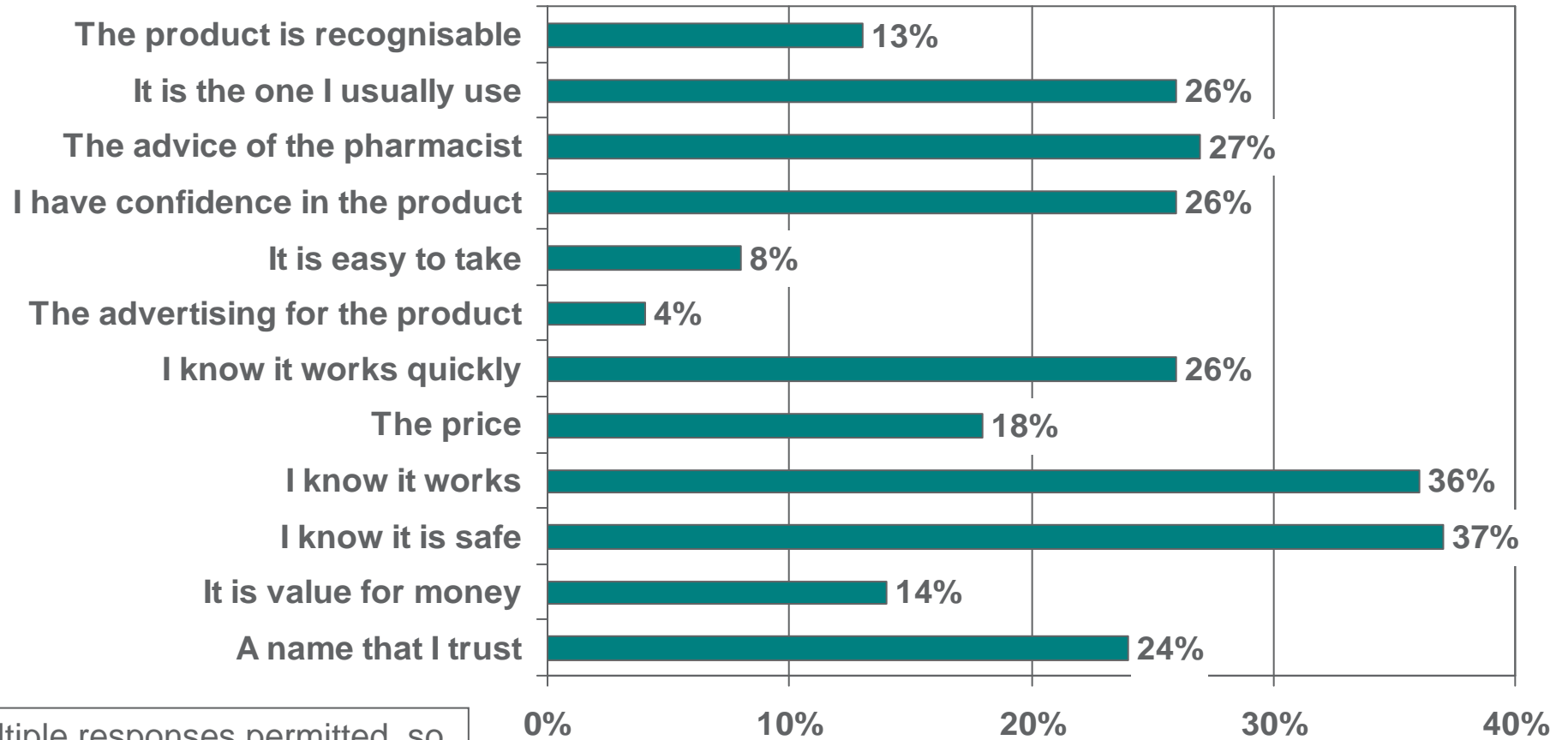
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents globally:



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# Q3. When choosing a non-prescription medicine, what factors are important to you?

## 50 Country Global Average



Multiple responses permitted, so aggregate exceeds 100%

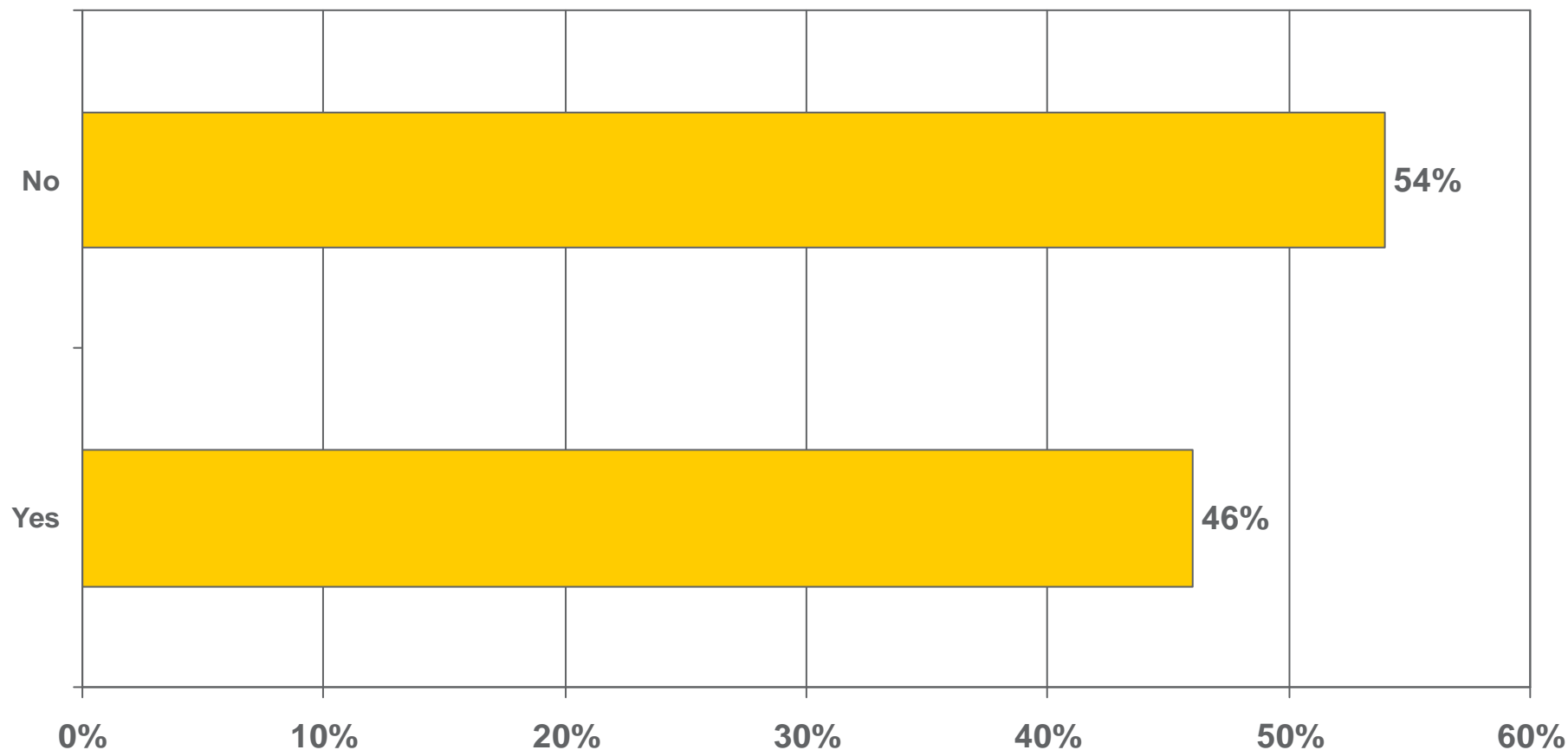
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



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# Q4. In the next year, do you expect that the global financial crisis will affect the amount of, or type of non-prescription medicines that you will use?

## 50 Country Global Average



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

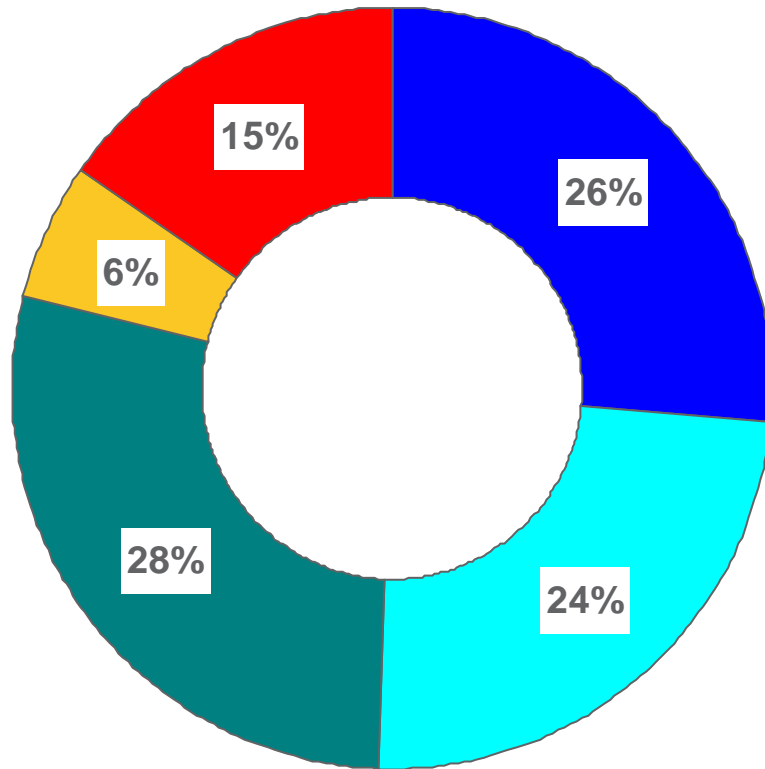
Note: Question asked only to those responding "yes" to question 4

## 50 Country Global Average



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: asked of those responding "yes" to question 4: - subset of 25,000+ respondents worldwide

## Q6. Which of the following statements best reflects how you ensure you use a non-prescription medicine responsibly? 50 Country Global Average

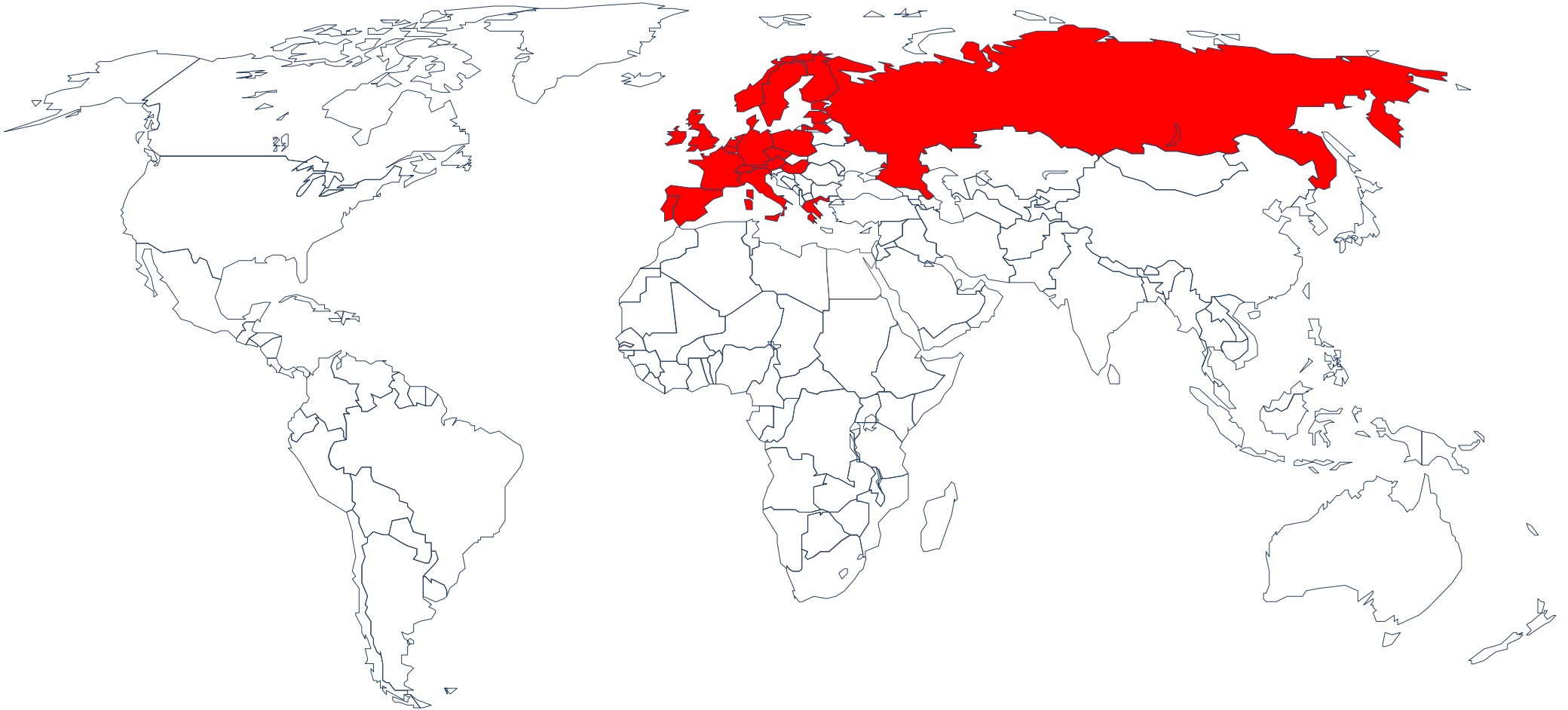


- I ask the pharmacist for advice on how to use the product
- I read the product information leaflet in the pack
- I read the usage instructions on the pack
- I look up the usage instructions on the internet
- I make my own decision based on previous experience

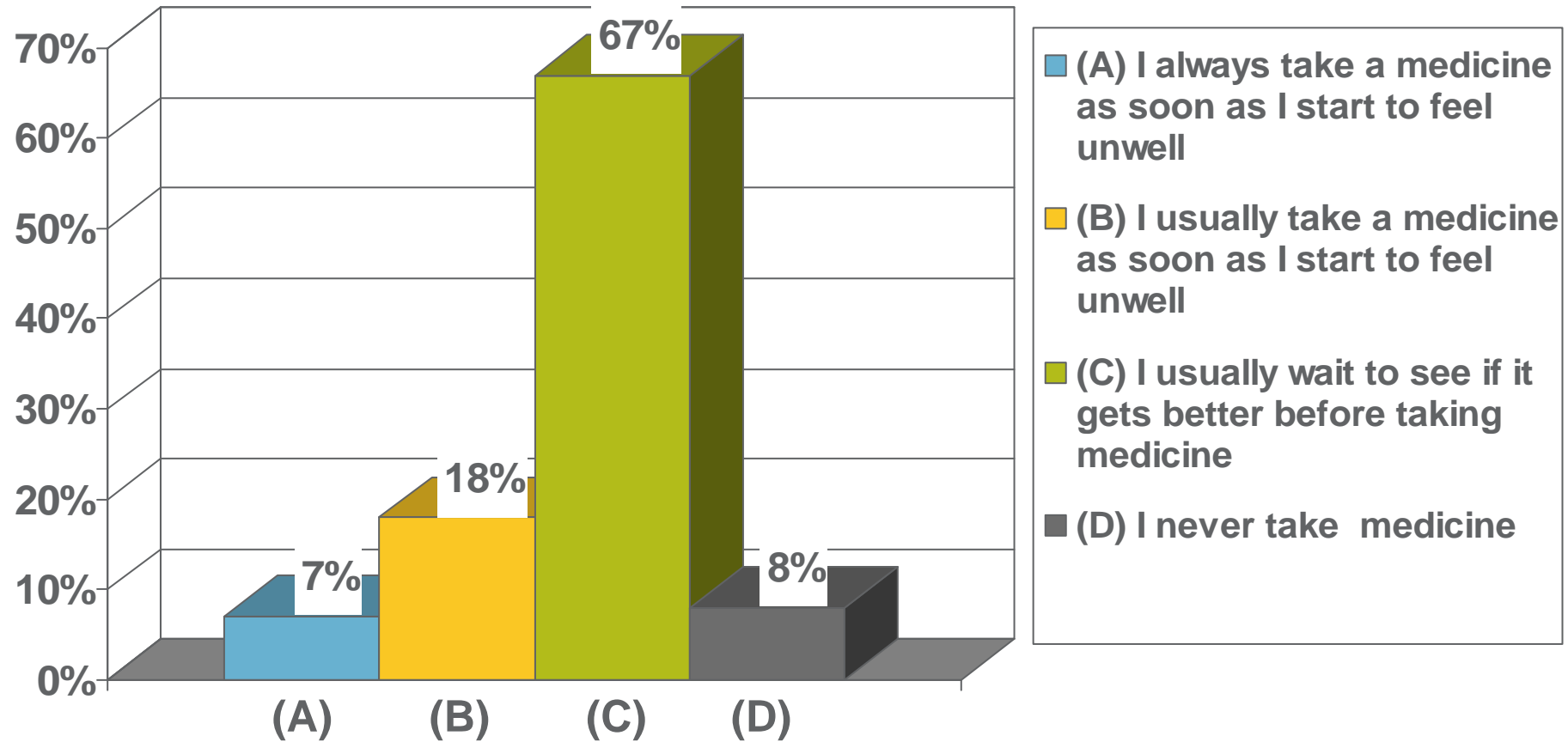
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

Europe

Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, Poland, Russia, Czech Republic, Hungary, Estonia, Latvia, Lithuania



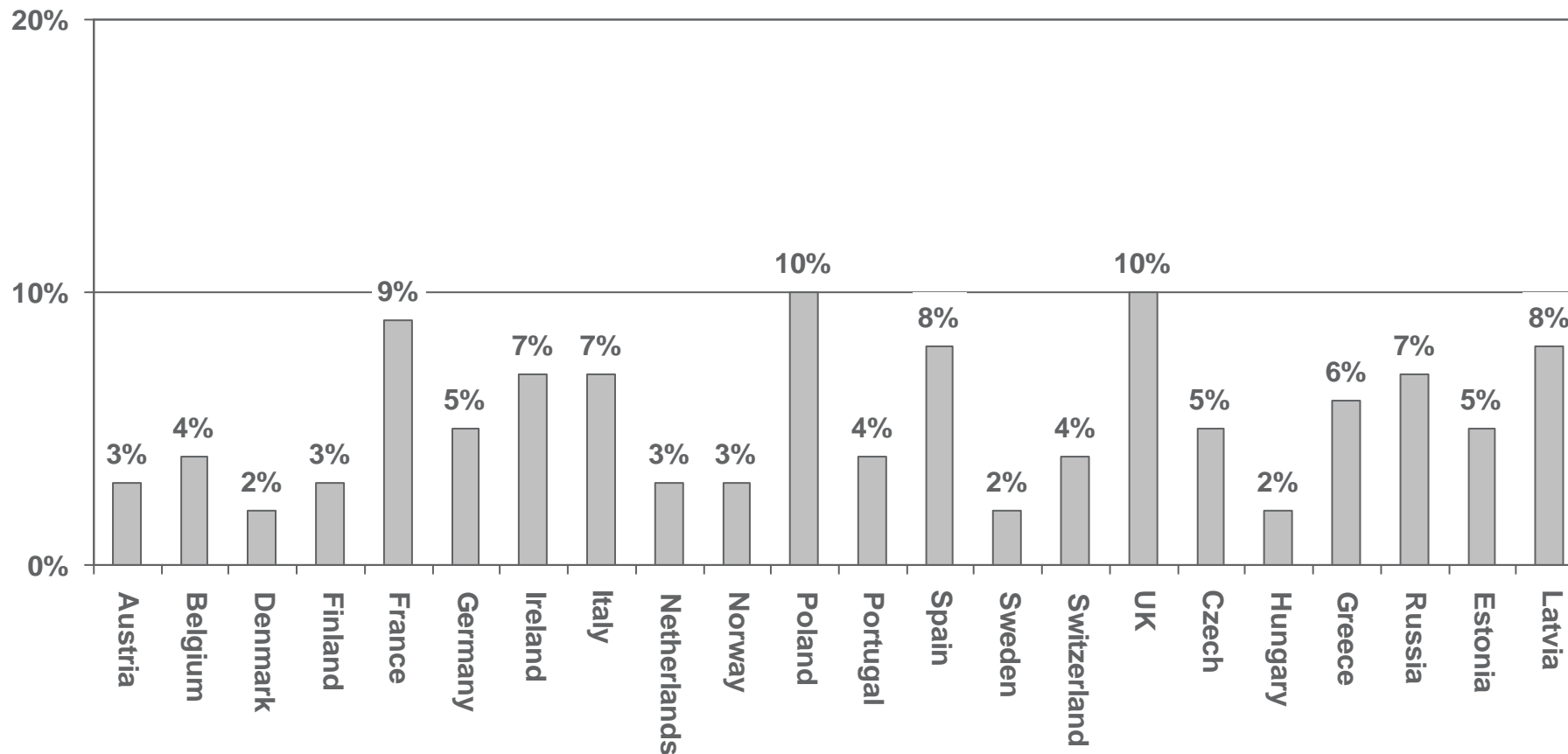
# Q1. When you feel the first signs of a minor ailment starting, which of the following applies to you? 22 Country Europe Average



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents globally

Q1. When you feel the first signs of a minor ailment starting, which of the following applies to you?

Europe - (A) I always take a medicine as soon as I start to feel unwell



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

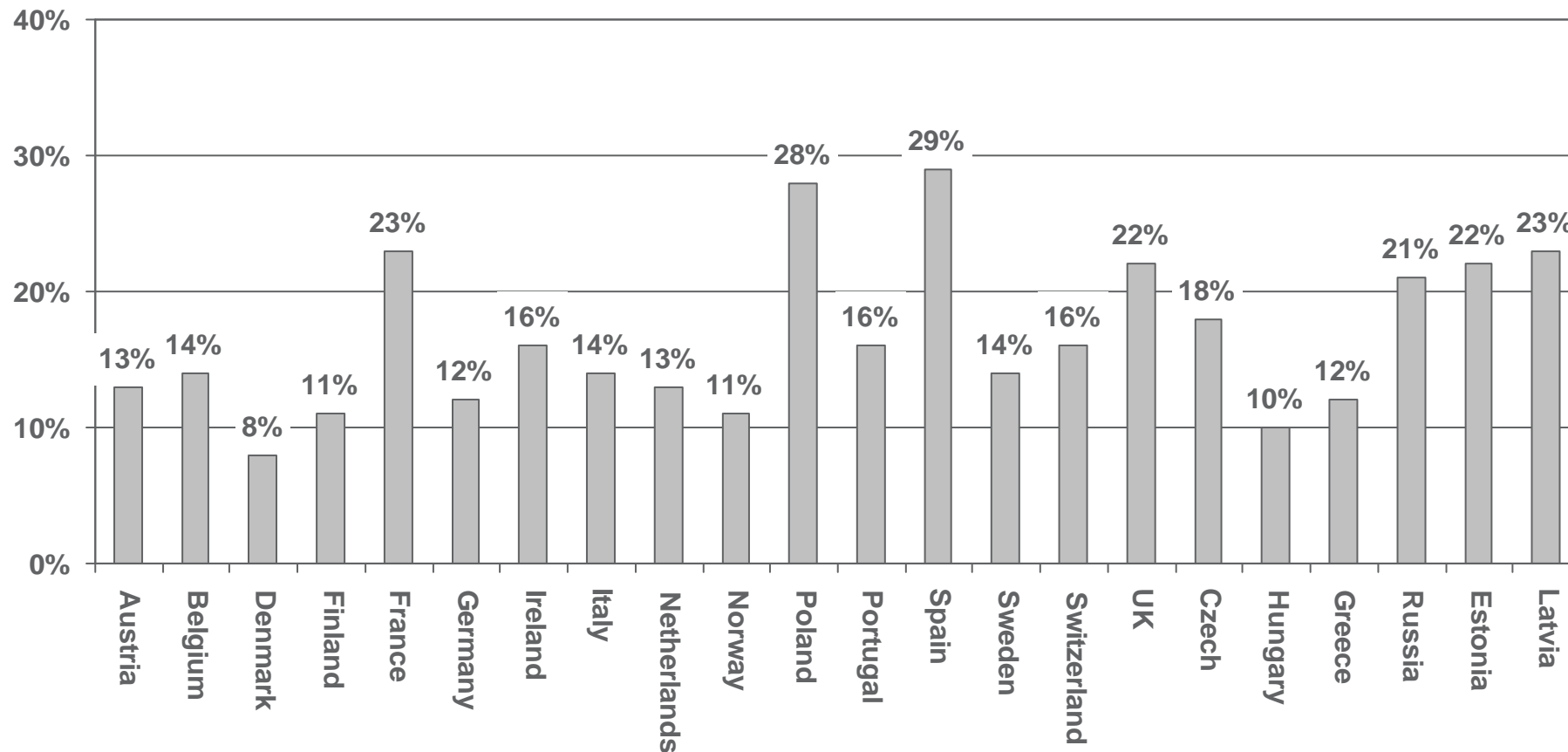


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Q1. When you feel the first signs of a minor ailment starting, which of the following applies to you?

Europe - (B) I usually take a medicine as soon as I start to feel unwell



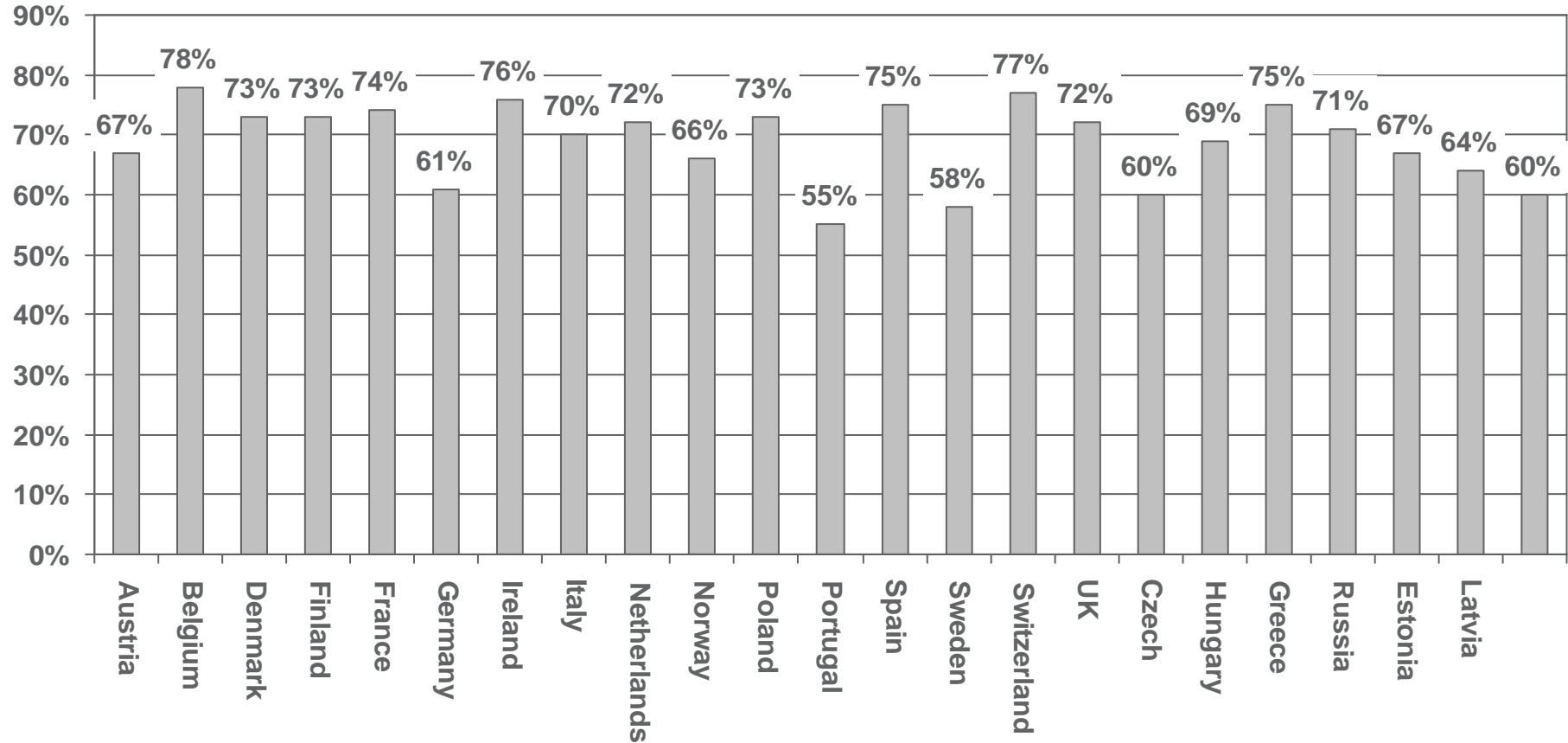
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



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Q1. When you feel the first signs of a minor ailment starting, which of the following applies to you?

Europe - (C) I usually wait and see if it gets better before taking a medicine



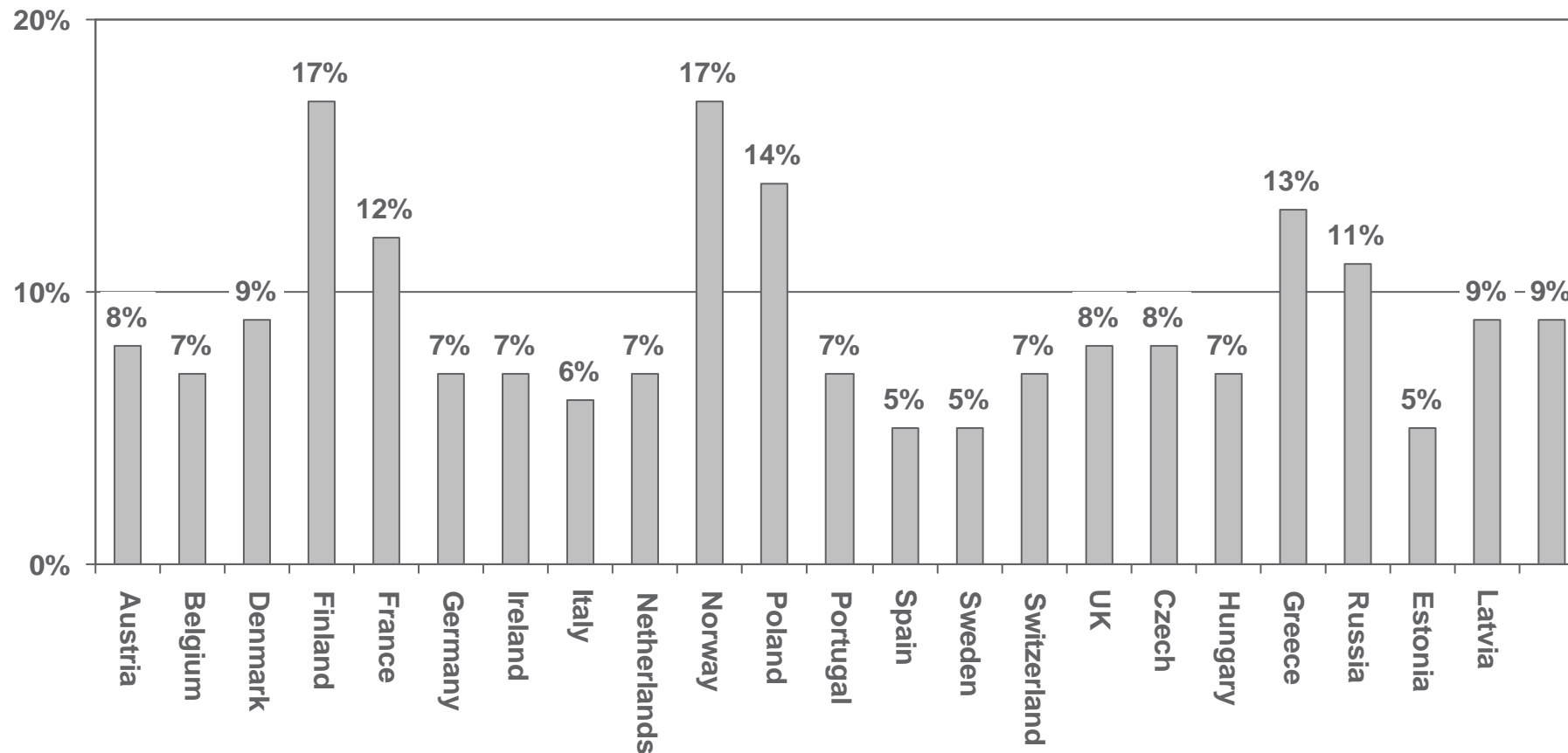
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



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Q1. When you feel the first signs of a minor ailment starting, which of the following applies to you?

Europe - (D) I never take a medicine

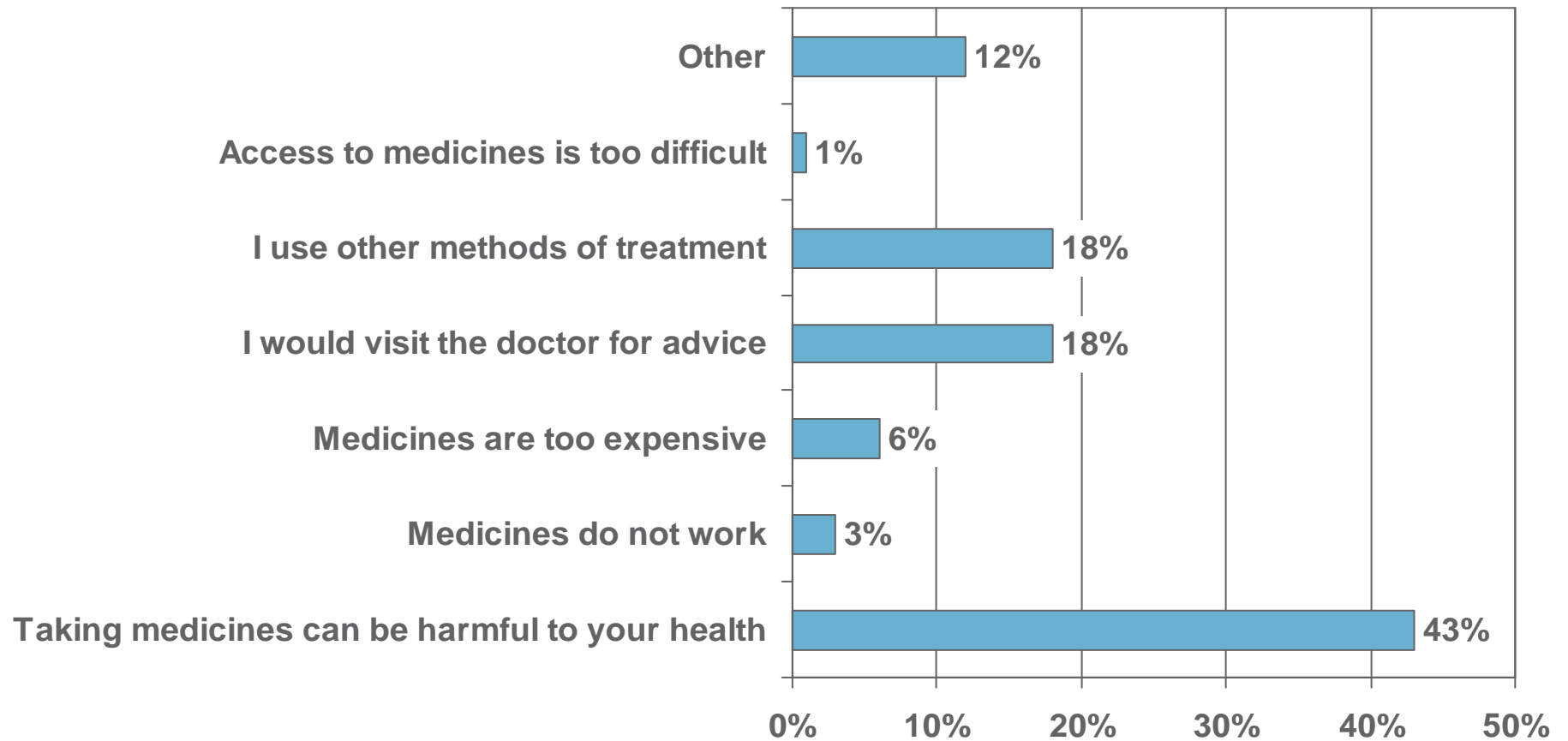


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



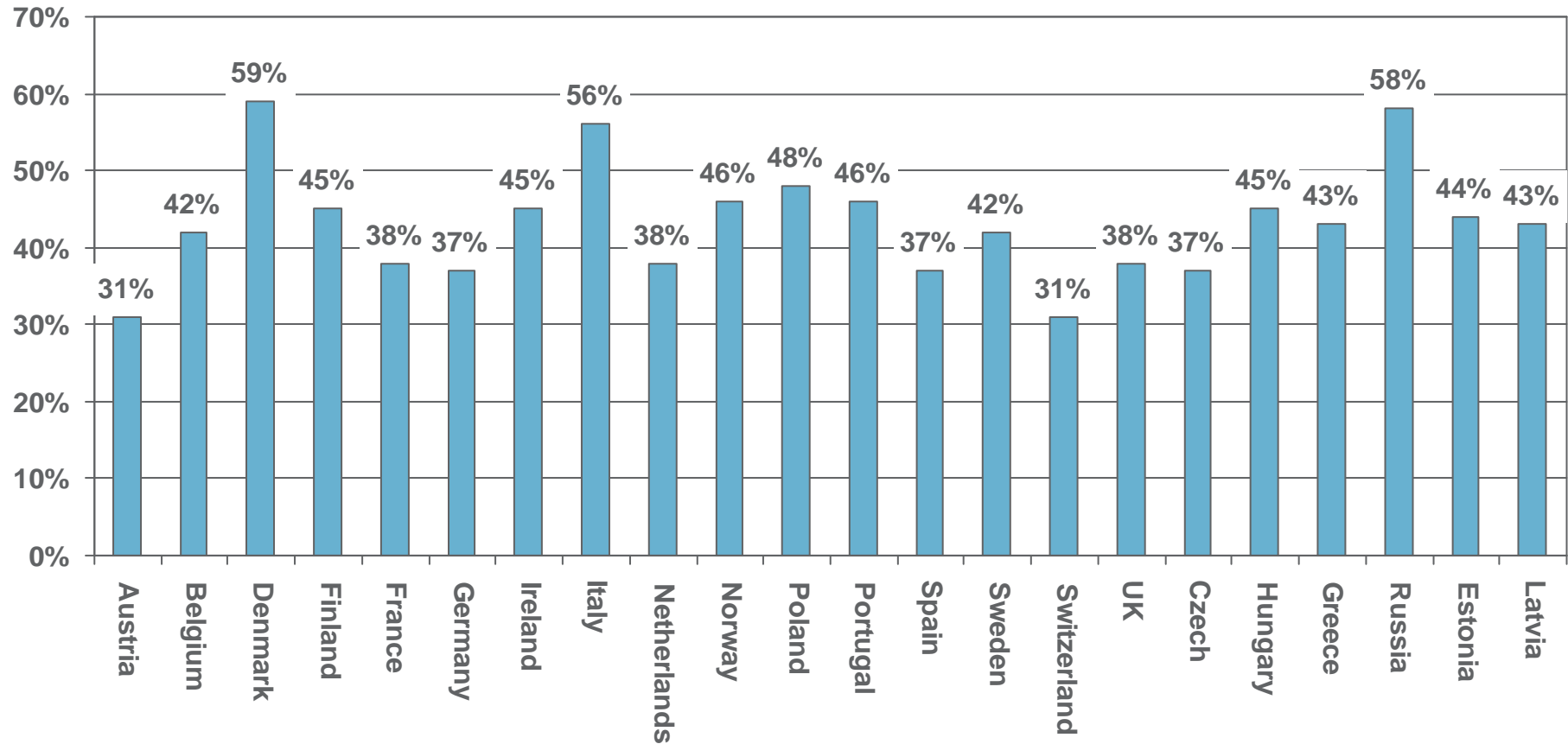
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# Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine? 22 Country Europe Average



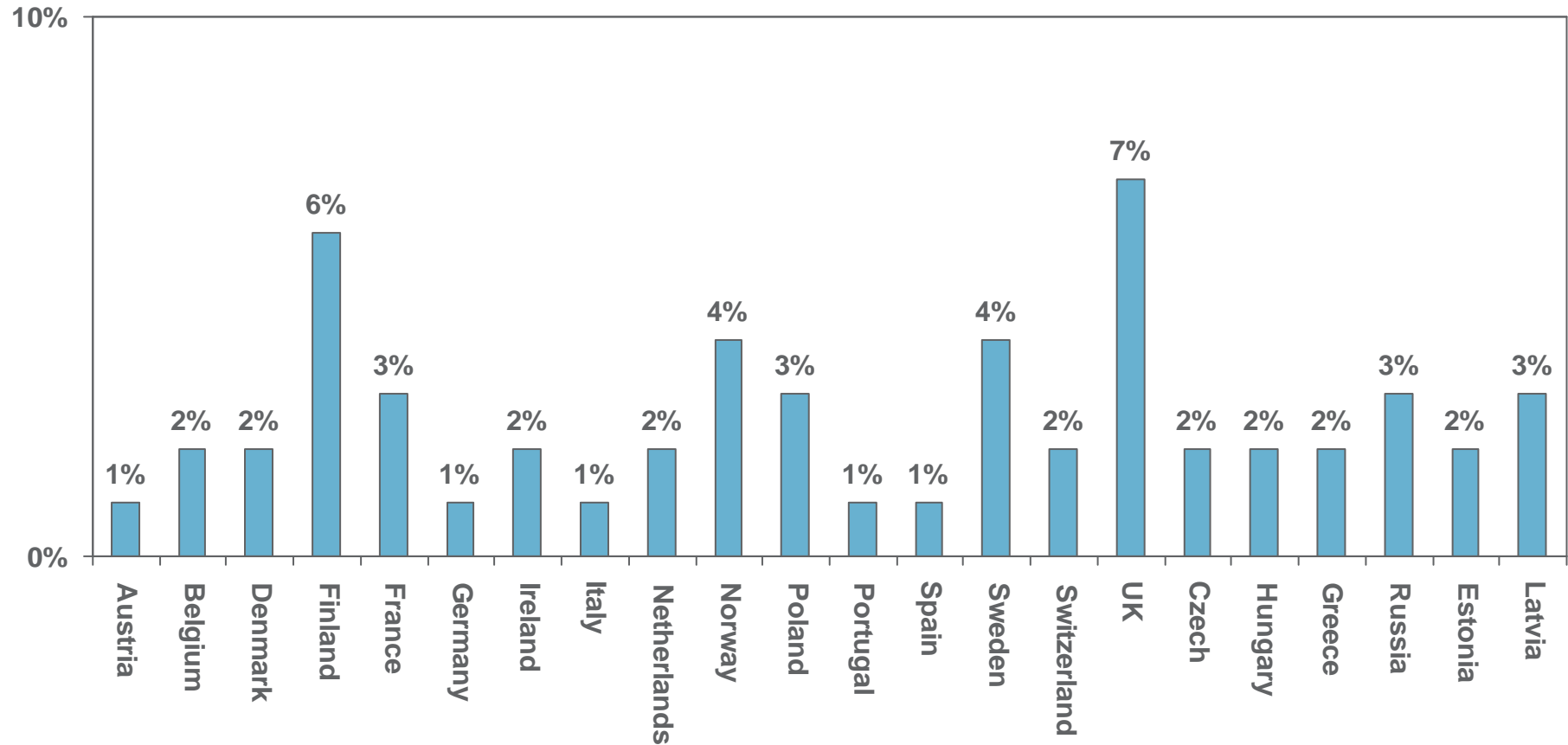
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded (C) & (D) for question 1

# Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine? Europe – Taking medicines can be harmful to your health



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded (C) & (D) for question 1

# Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine? Europe – Medicines do not work

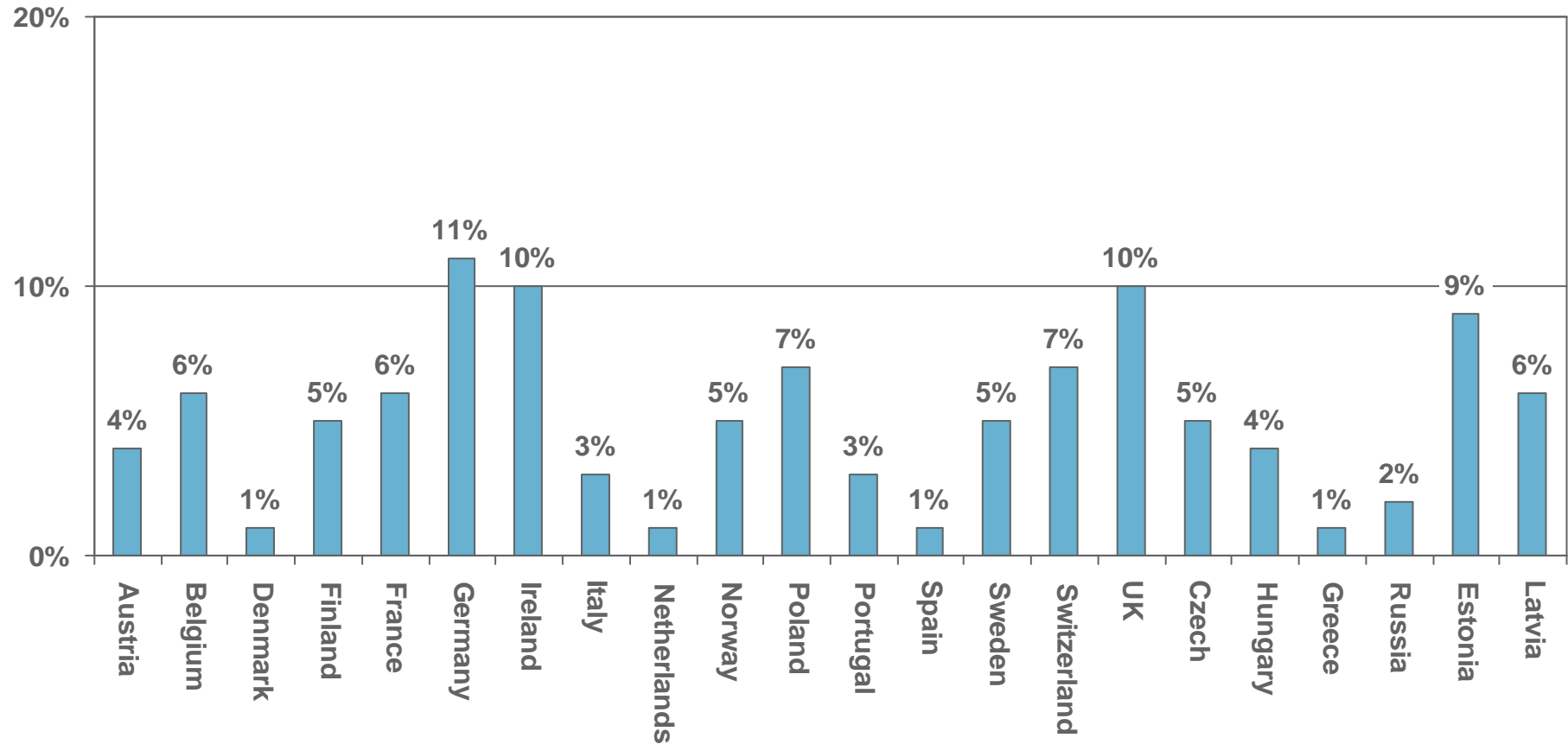


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded (C) & (D) for question 1



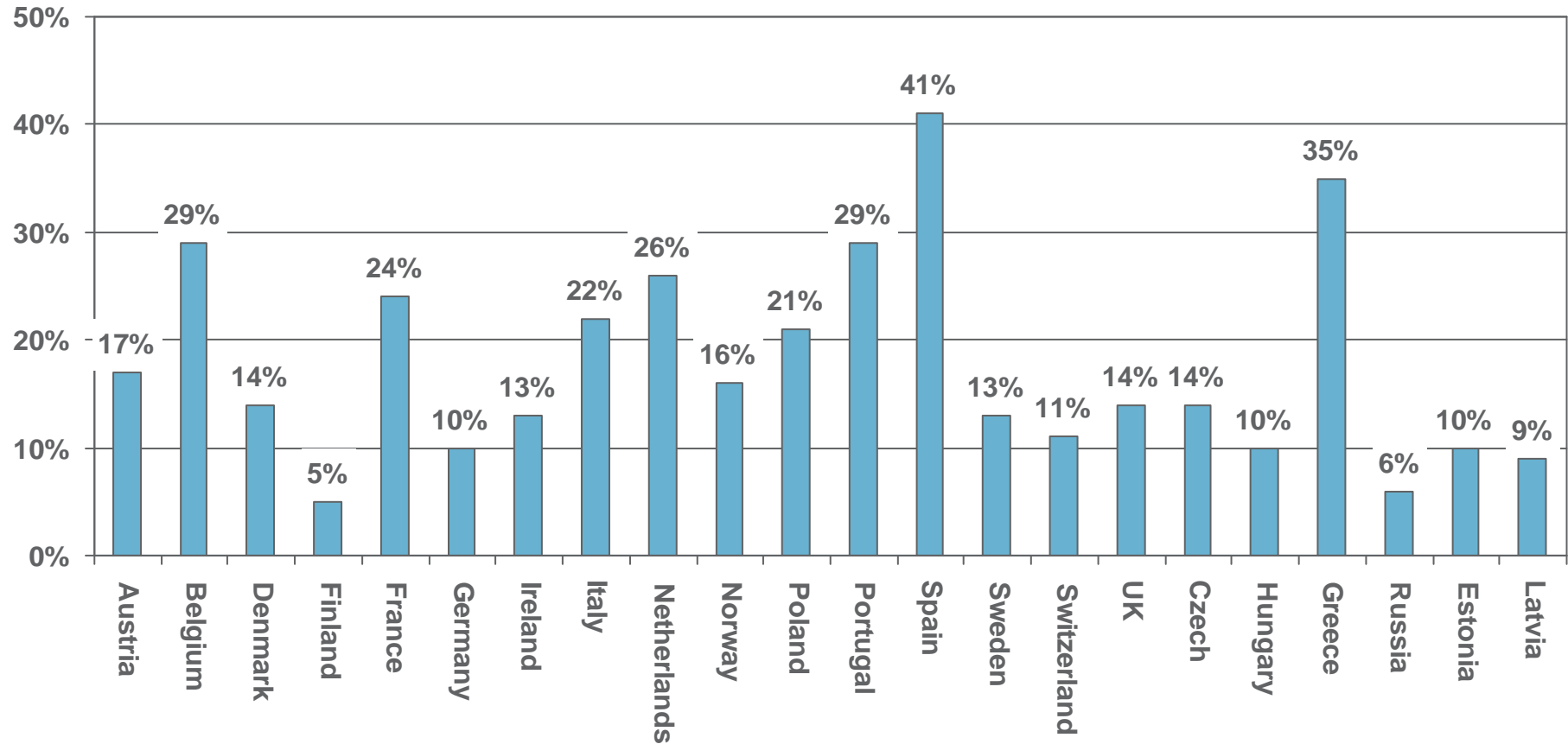
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# Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine? Europe – Medicines are too expensive



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded (C) & (D) for question 1

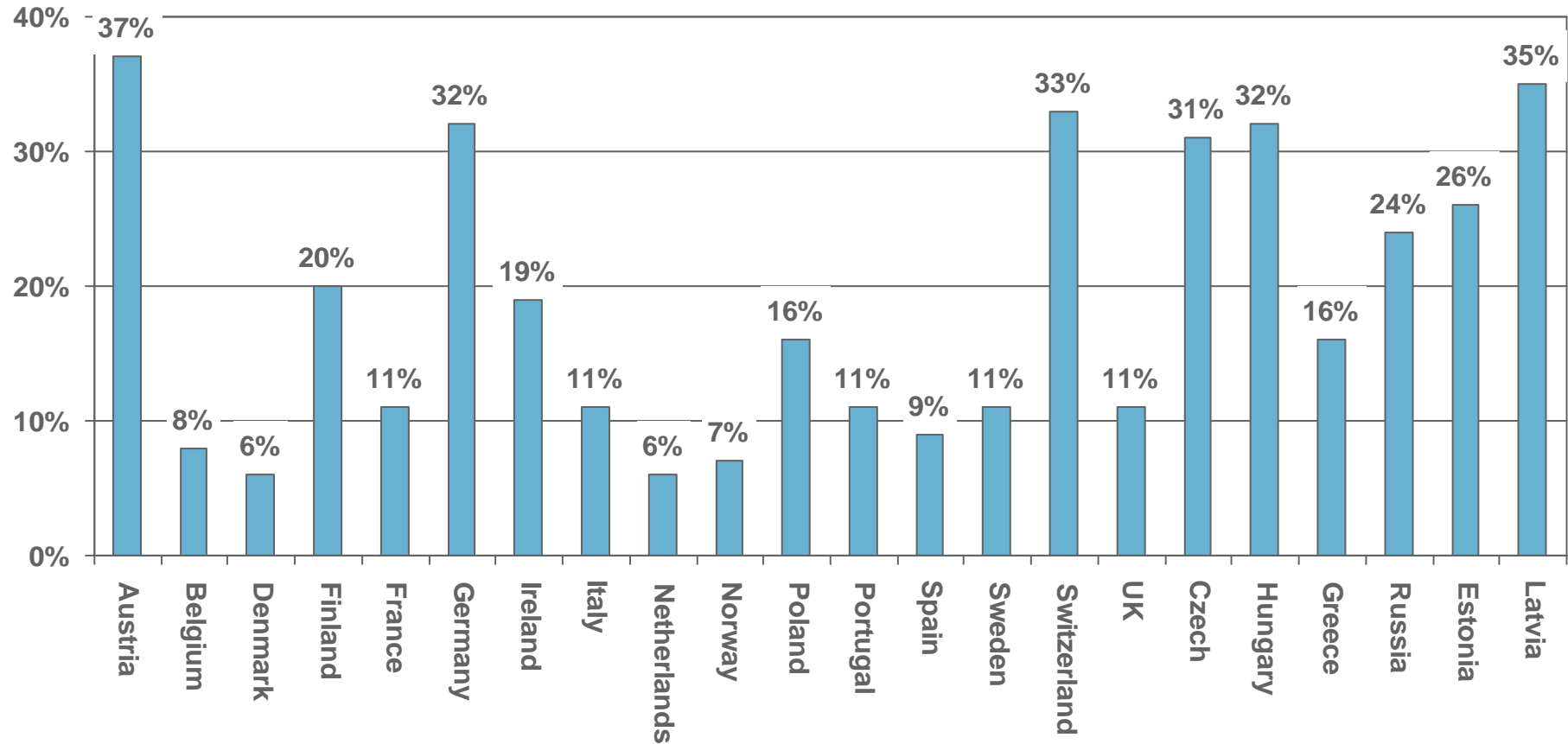
# Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine? Europe – I would visit the doctor for advice



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded (C) & (D) for question 1

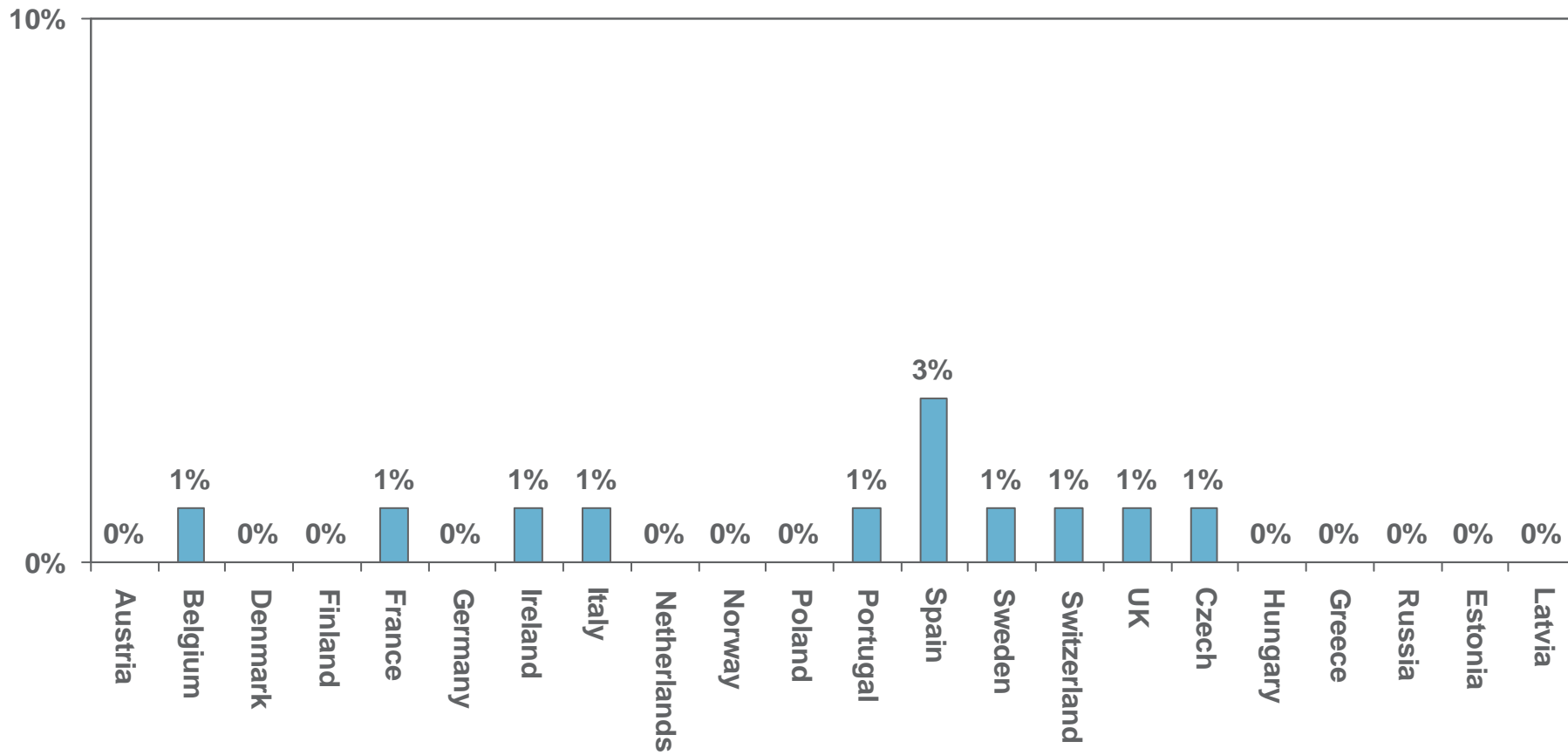


# Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine? Europe – I use other methods of treatment



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded (C) & (D) for question 1

# Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine? Europe – Access to medicines is too difficult

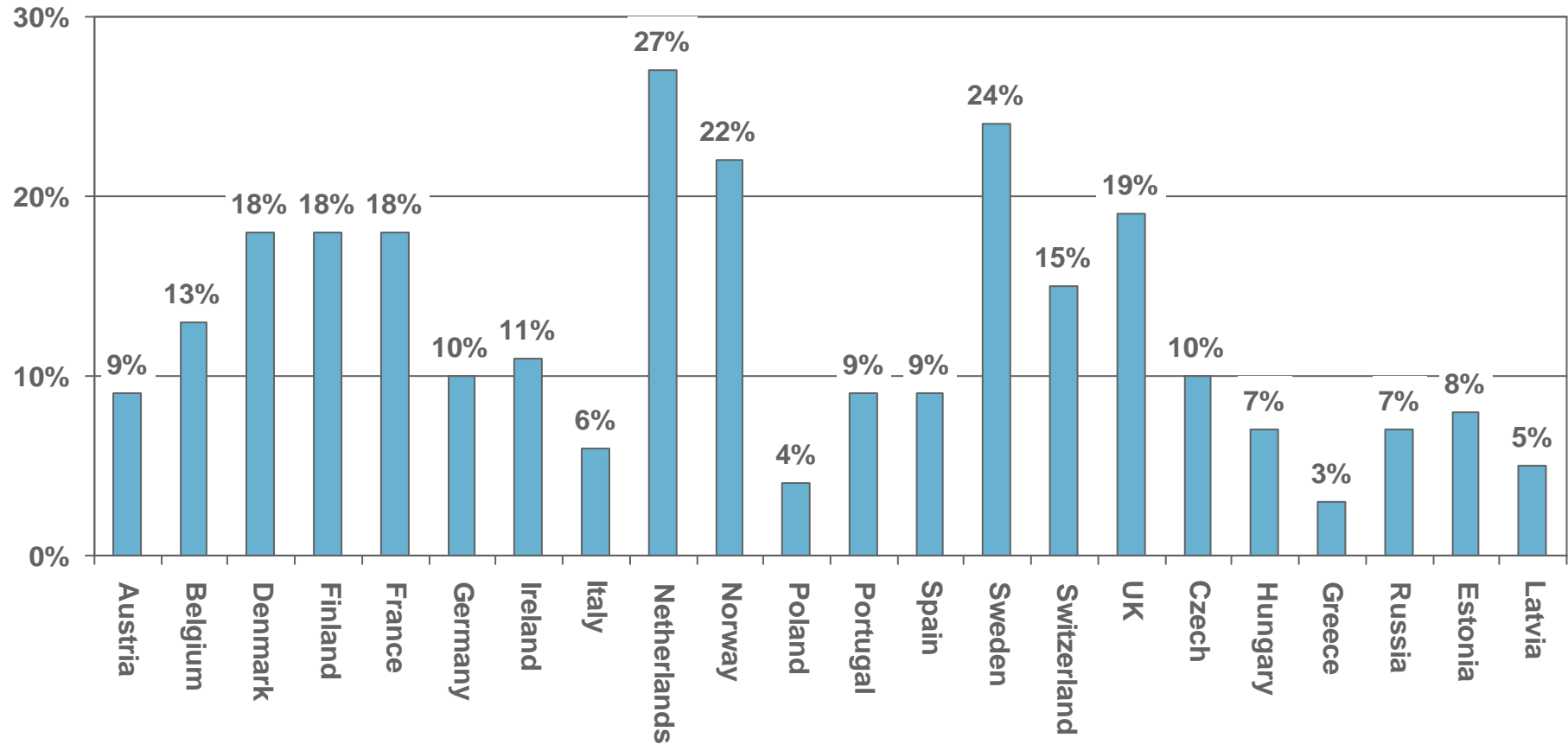


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded (C) & (D) for question 1



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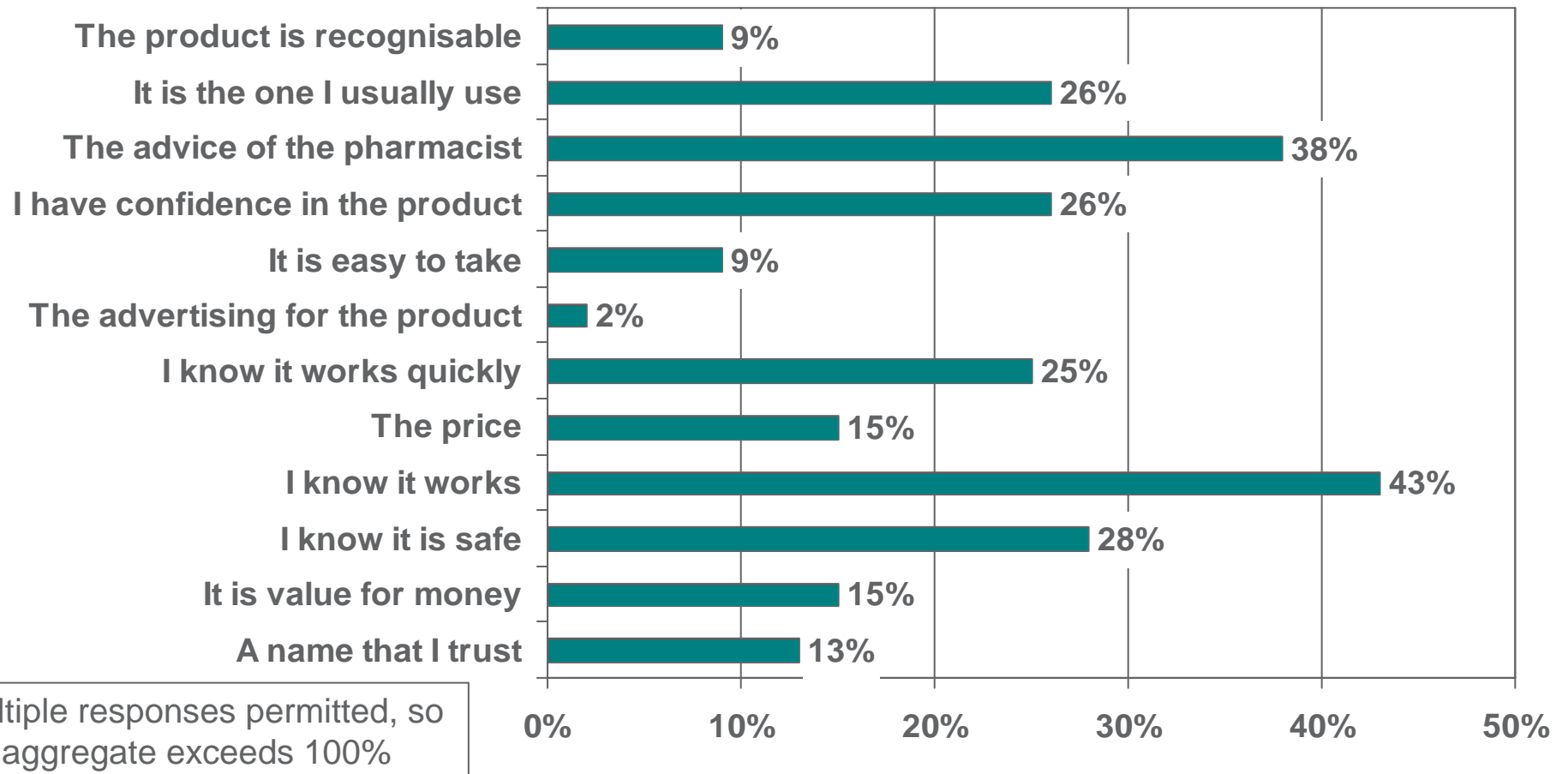
# Q2. If you “usually wait to see” or “never take medicine” (Q1), what is the main reason that you would not take medicine? Europe – Other reasons



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded (C) & (D) for question 1

# Q3. When choosing a non-prescription medicine, what factors are important to you?

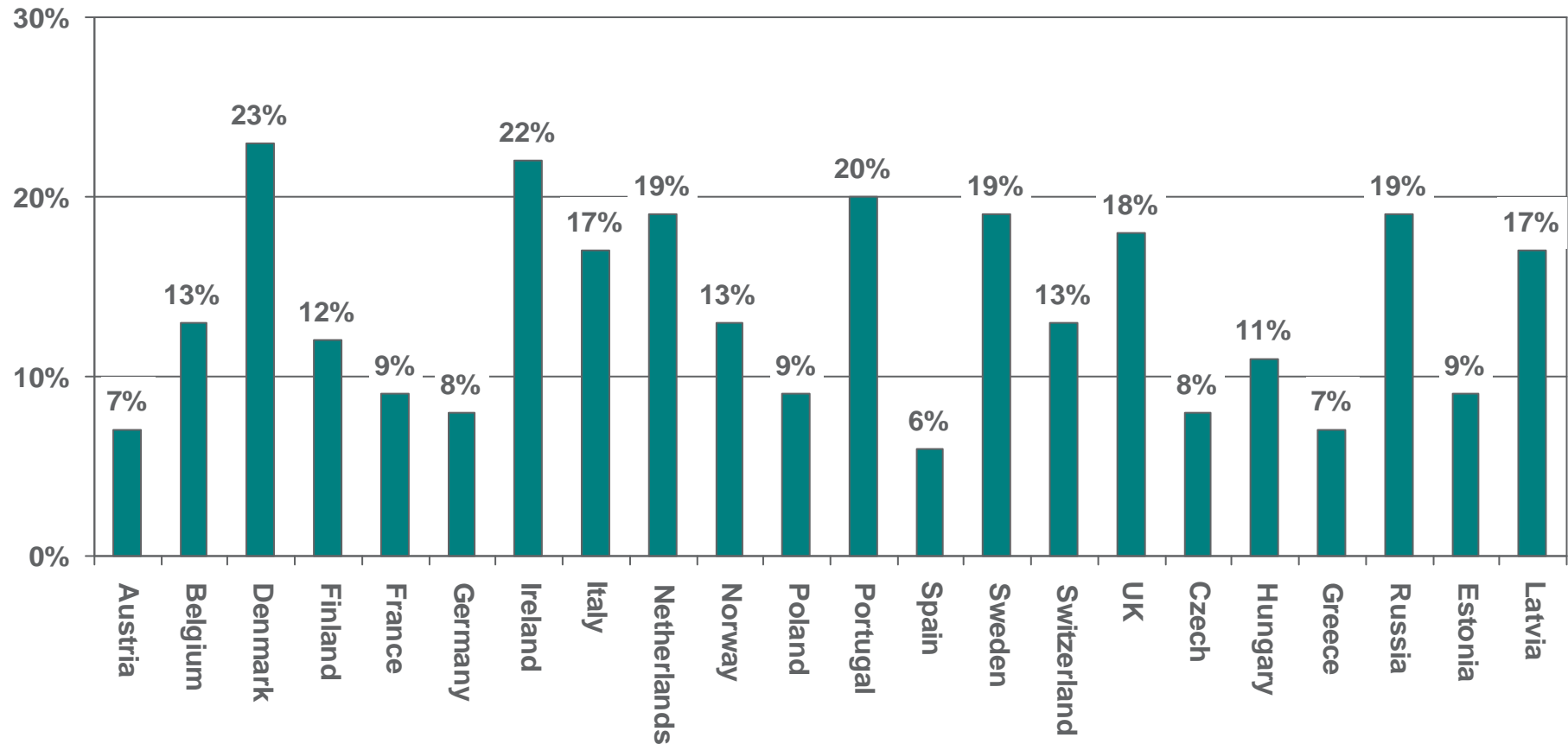
## 22 Country Europe Average



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – A name that I trust

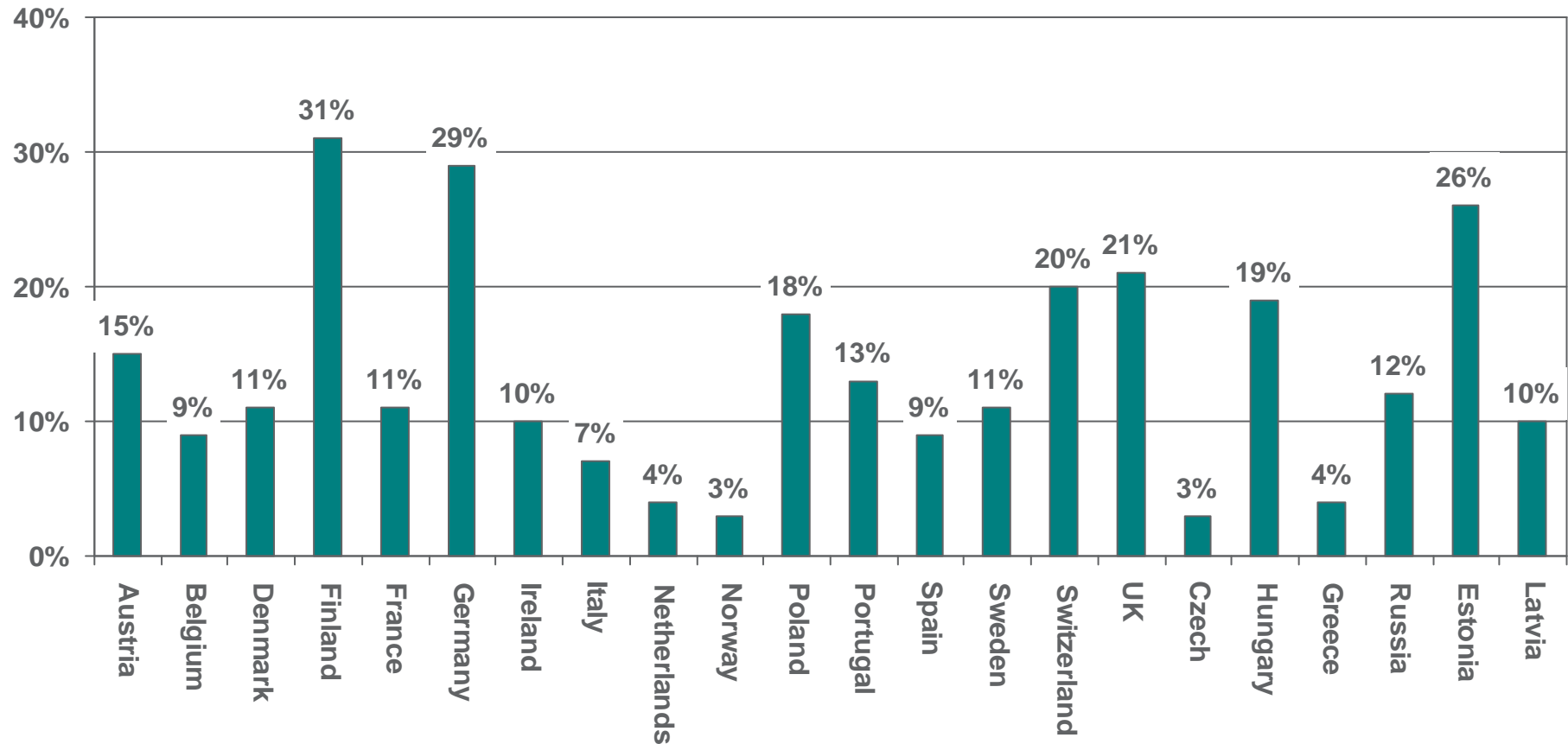


% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – It is value for money



% of respondents choosing this option – more than one option could be chosen

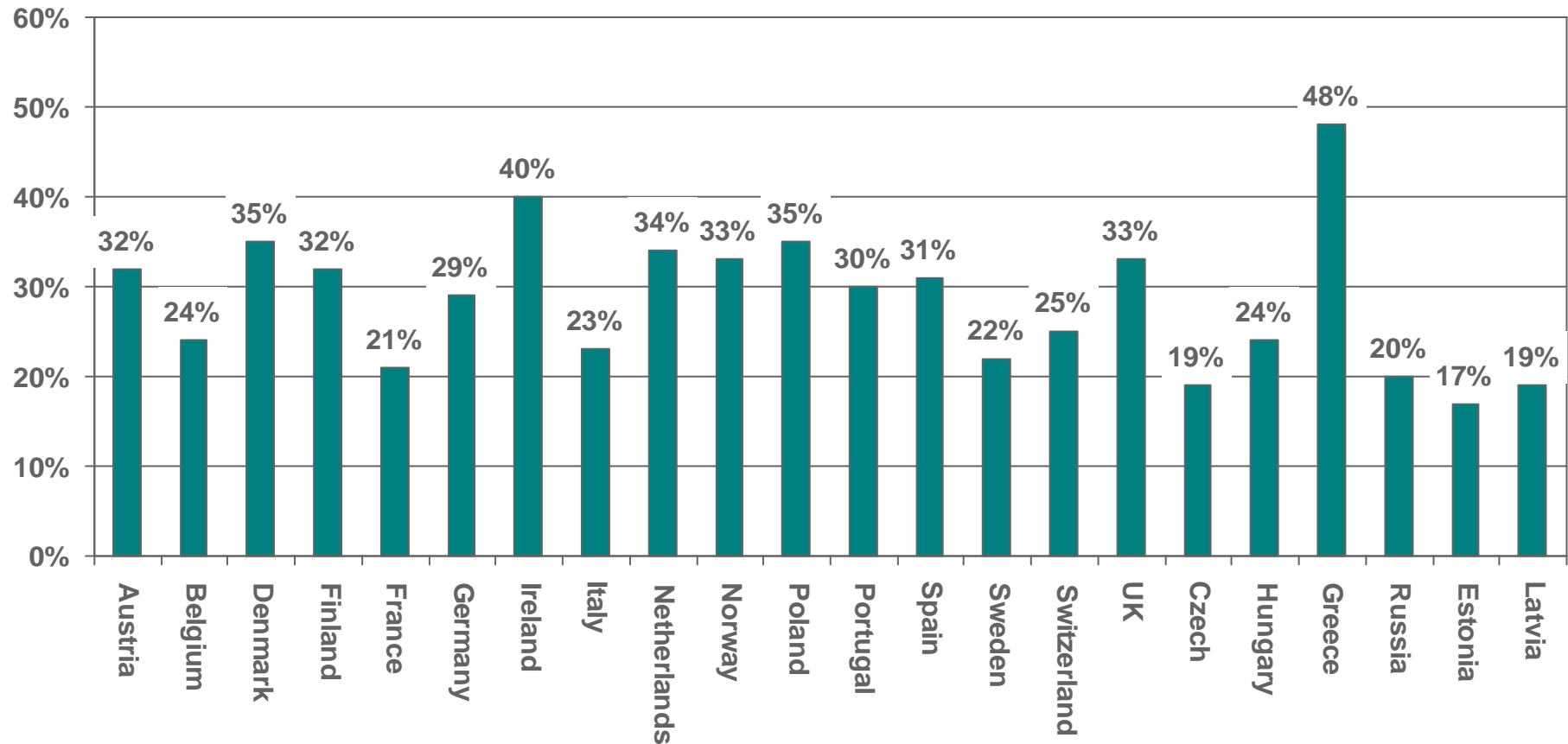
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



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# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – I know it is safe

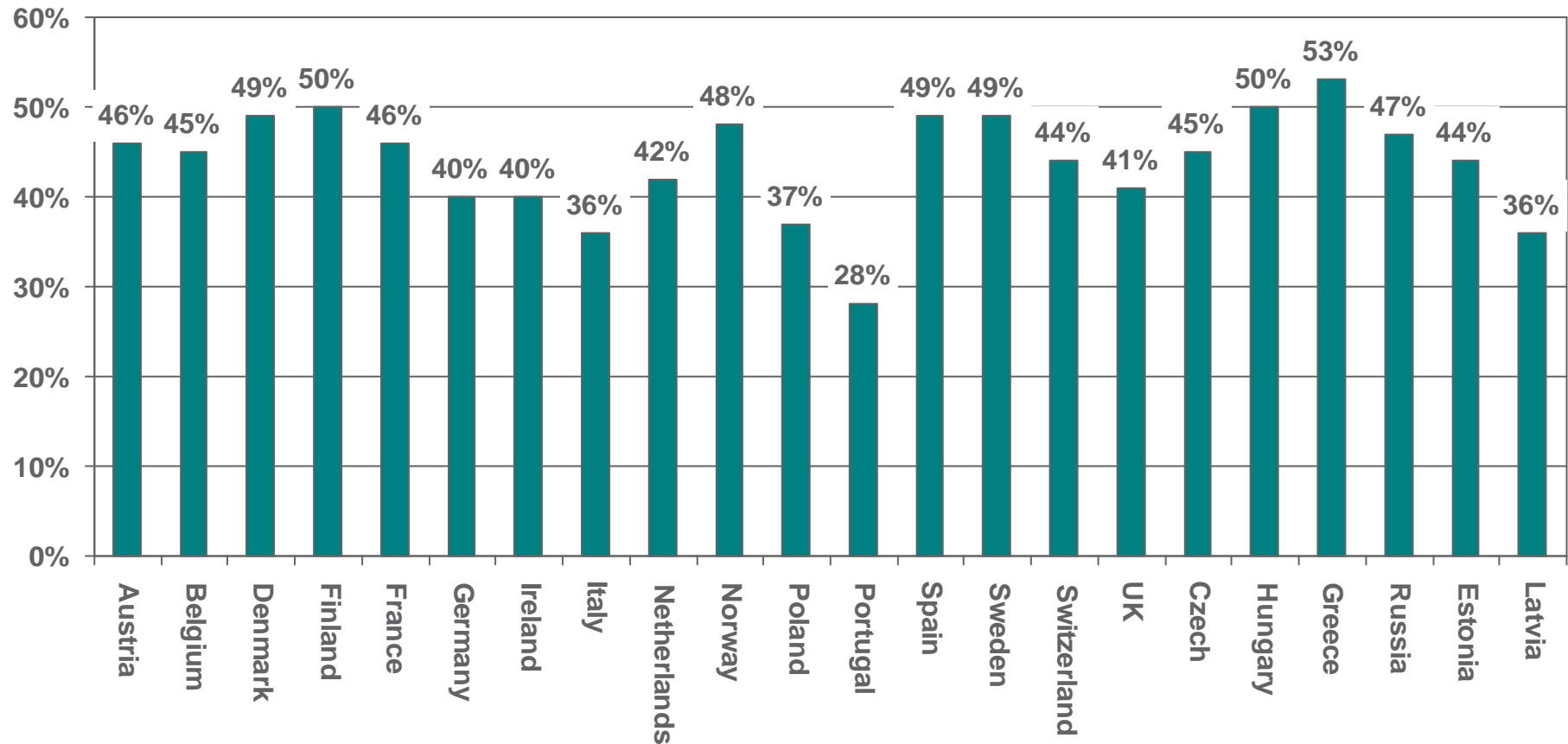


% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – I know it works



% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

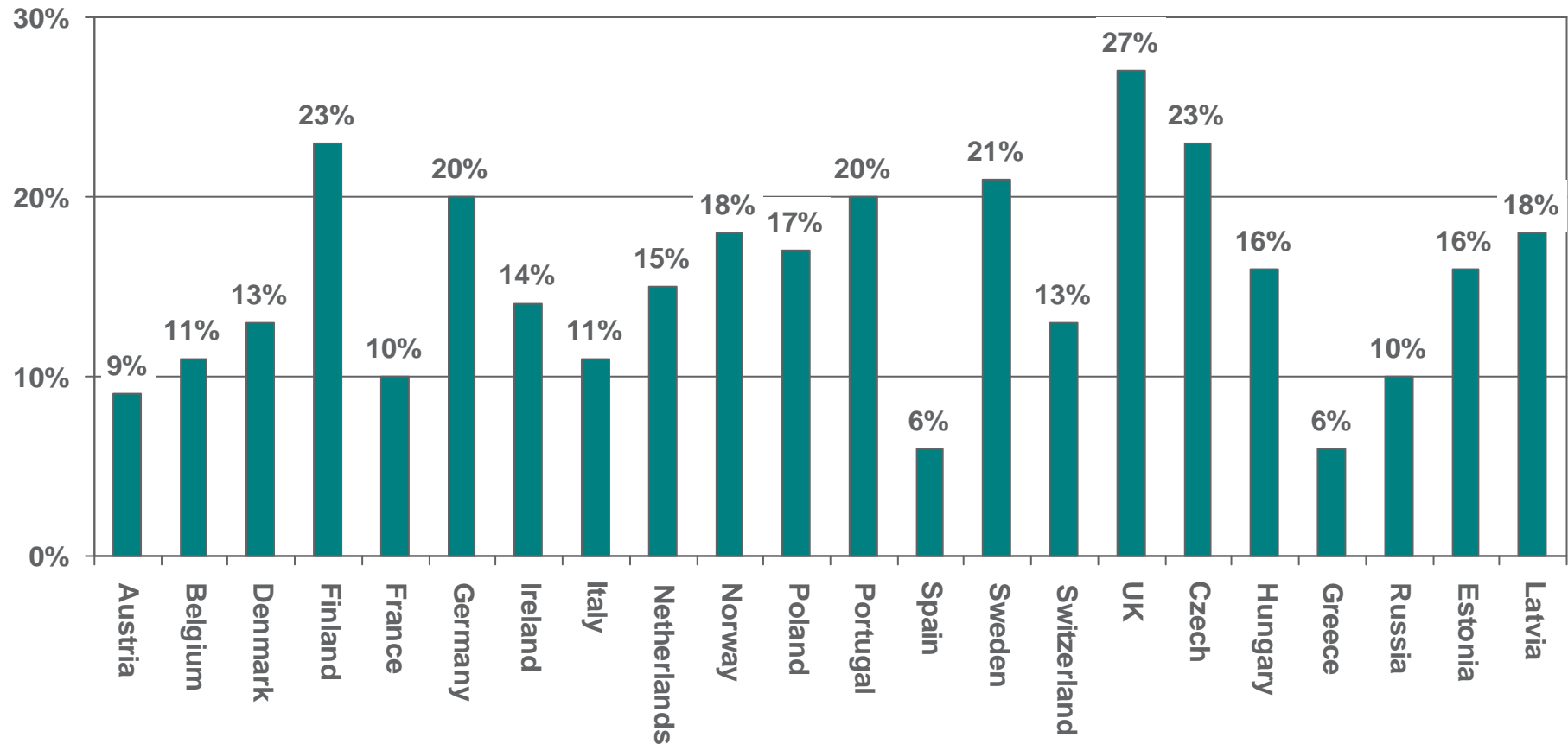


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# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – The price

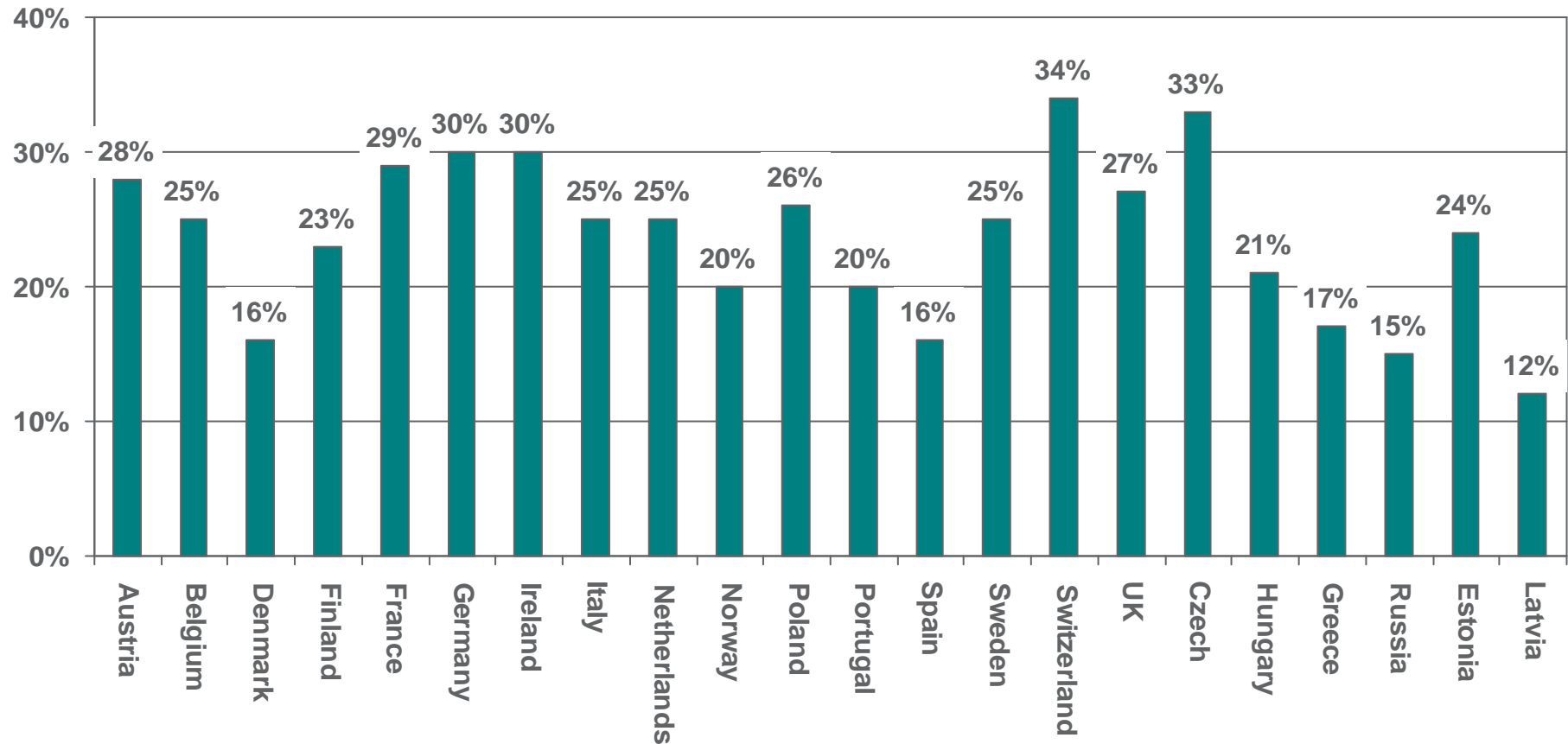


% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – I know it works quickly



% of respondents choosing this option – more than one option could be chosen

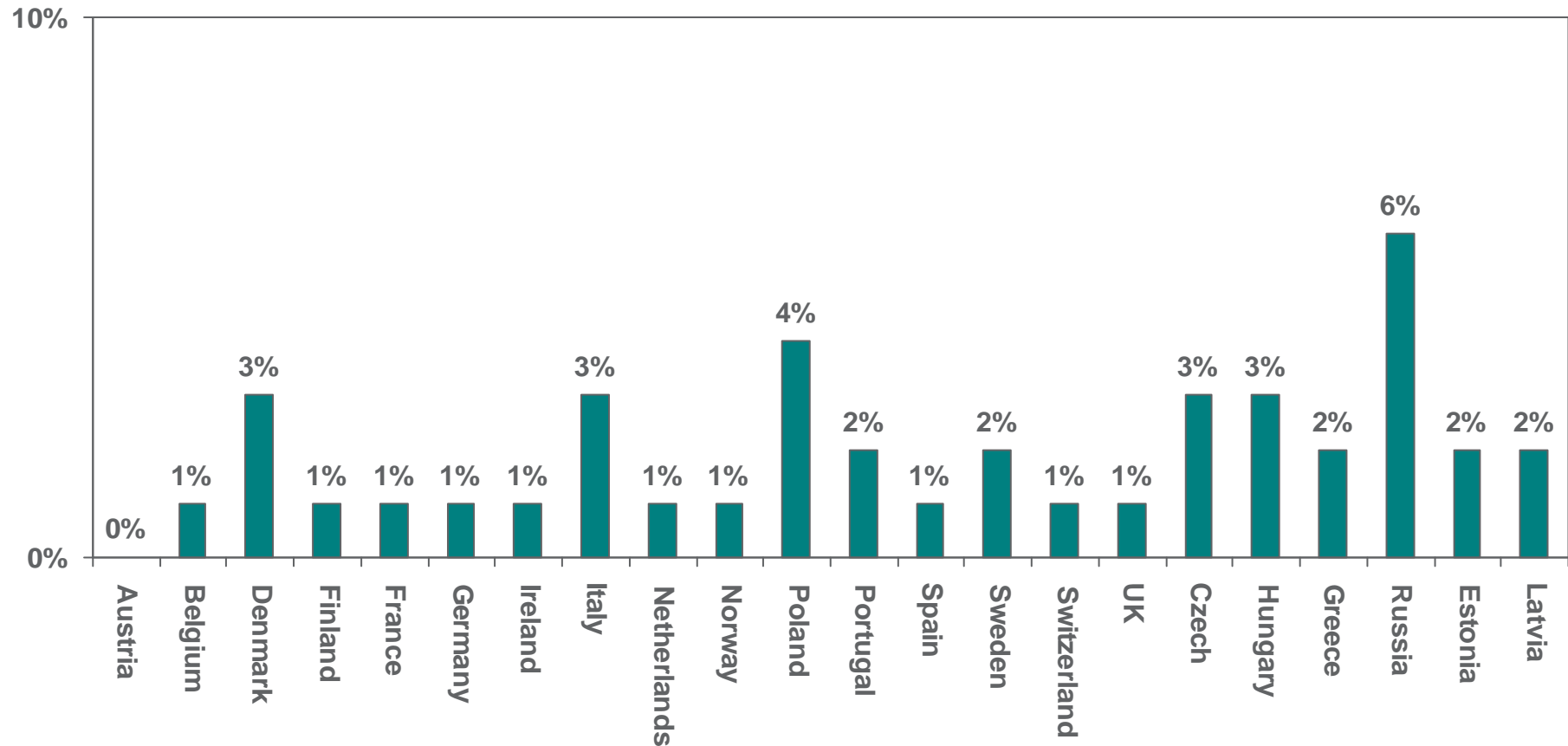
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



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# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – The advertising for the product

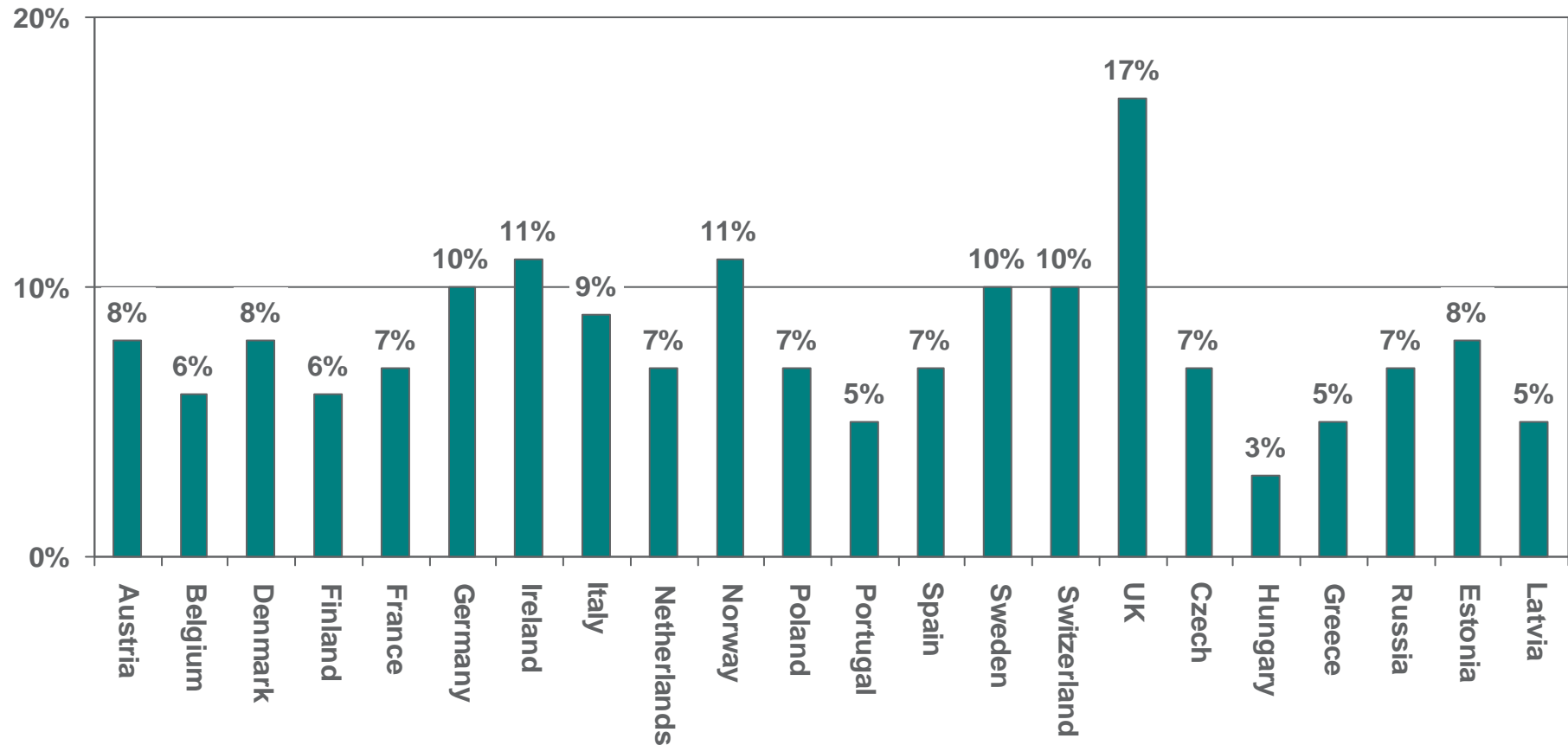


% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – It is easy to take



% of respondents choosing this option – more than one option could be chosen

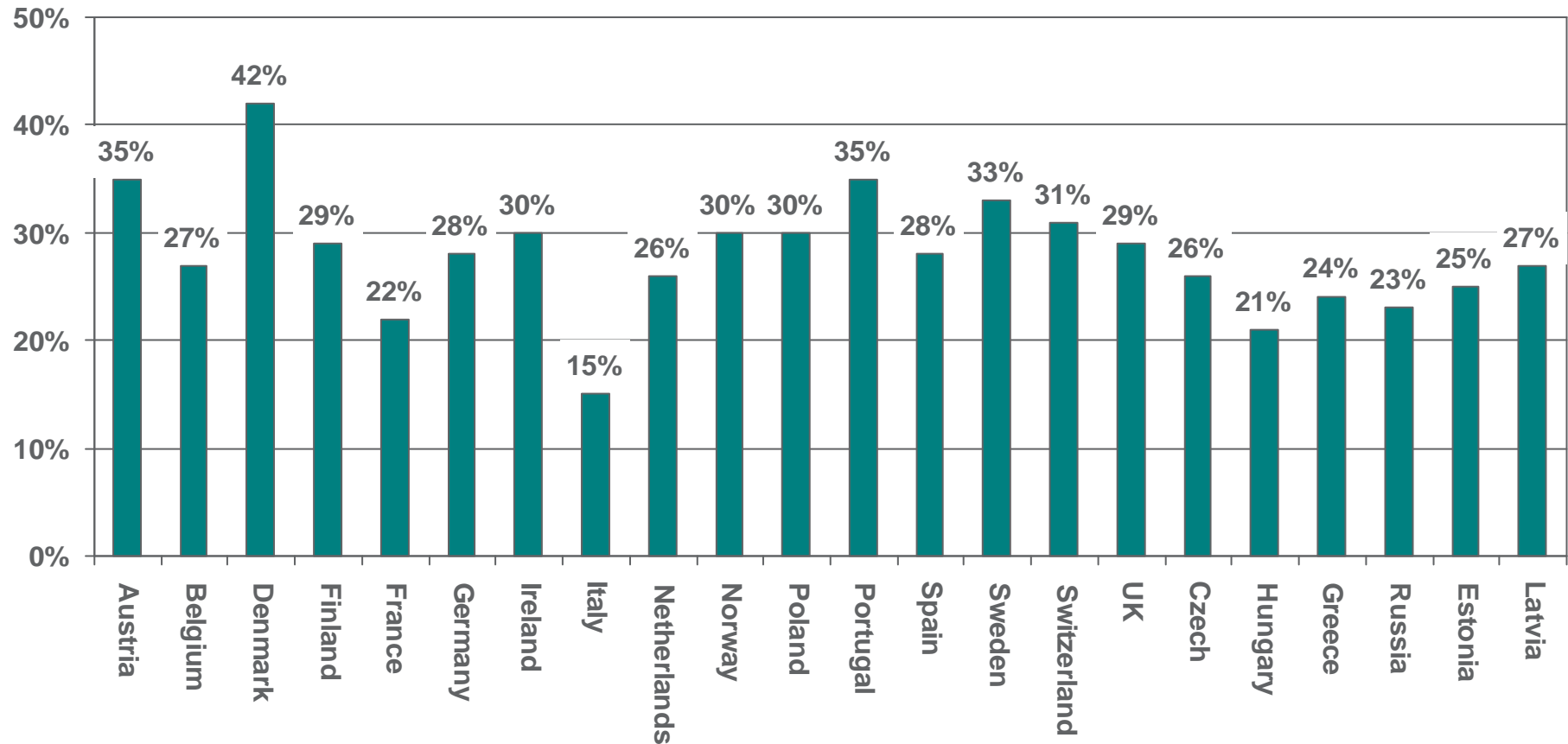
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



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# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – I have confidence in the product

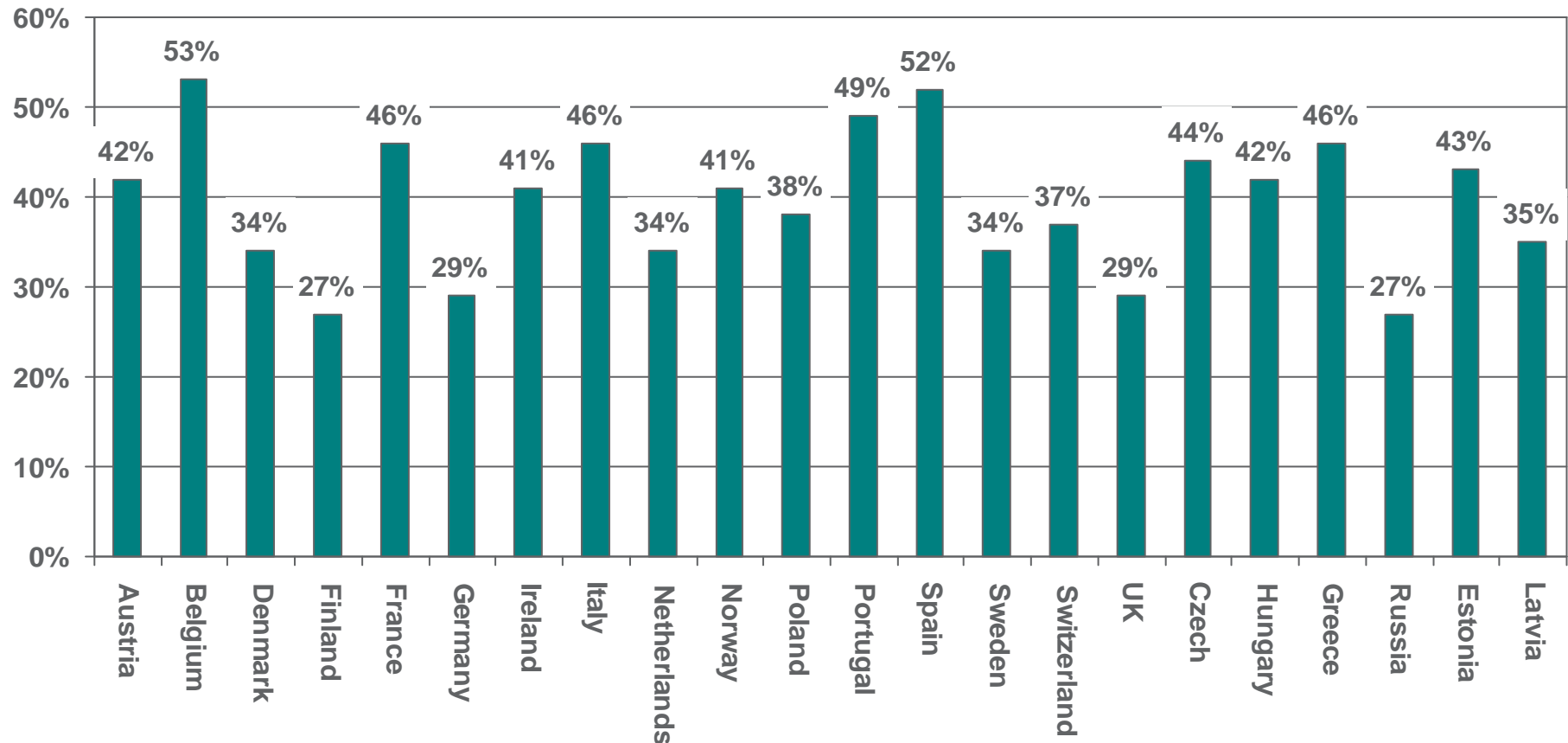


% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – The advice of the pharmacist

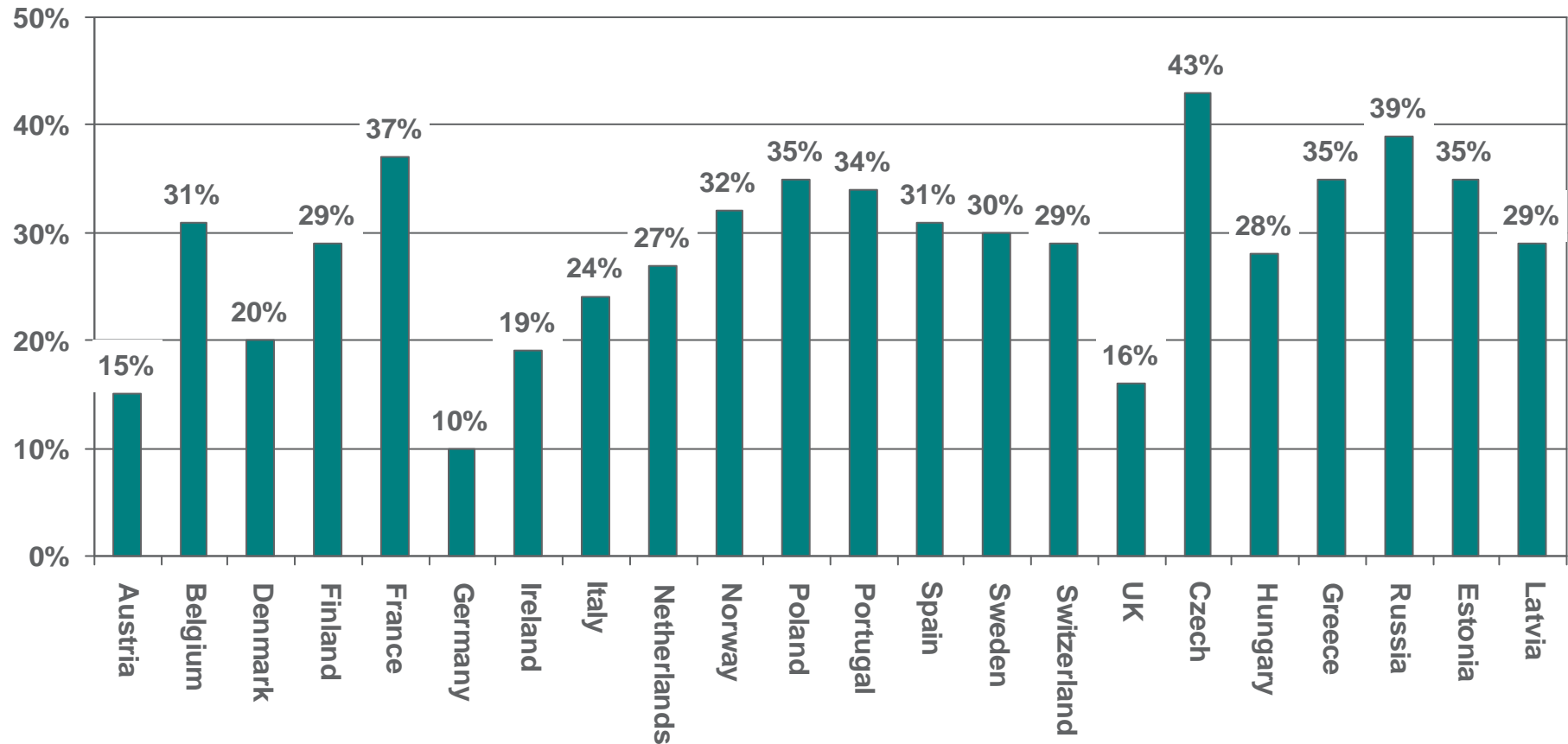


% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – It is the one I usually use

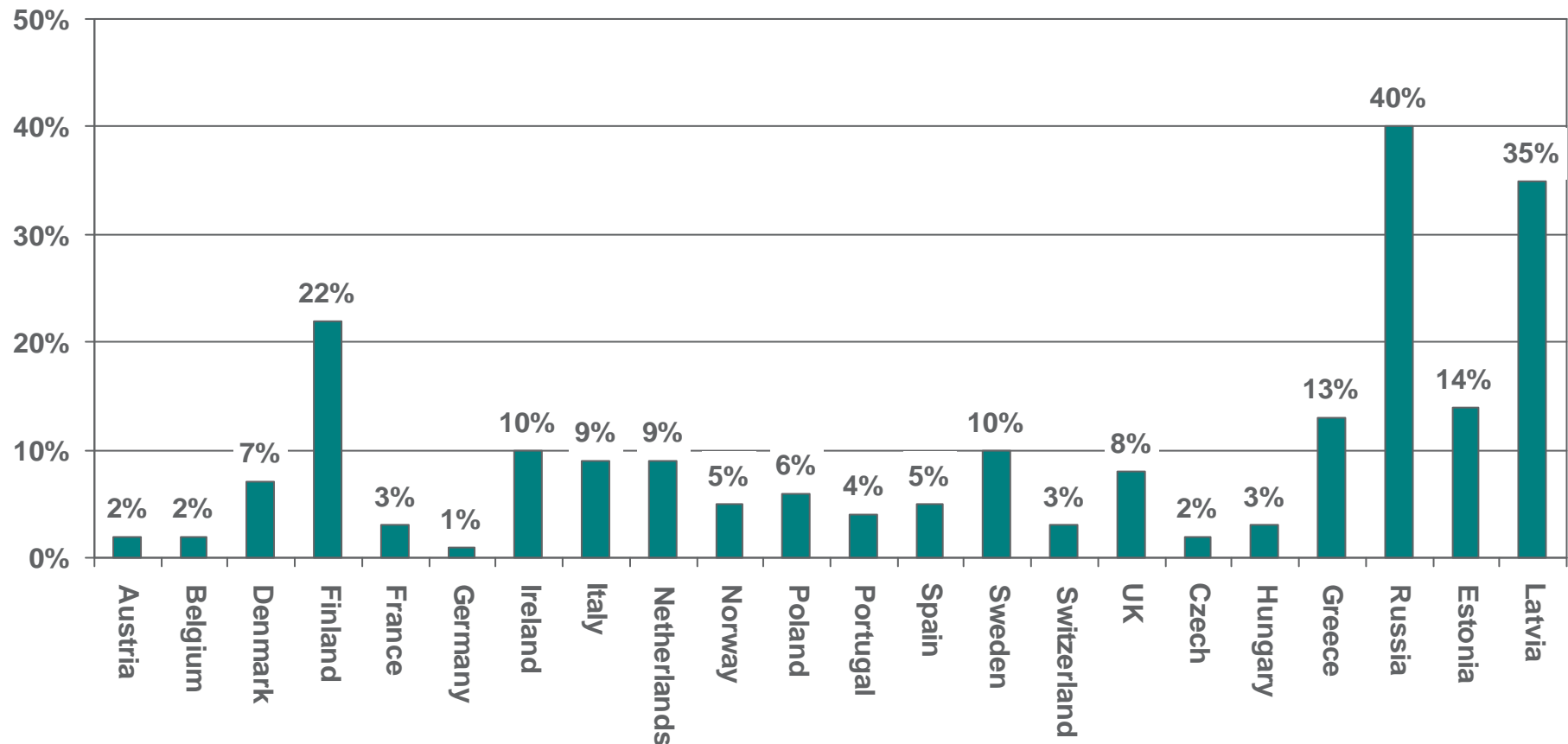


% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q3. When choosing a non-prescription medicine, what factors are important to you?

## Europe – The product is recognisable

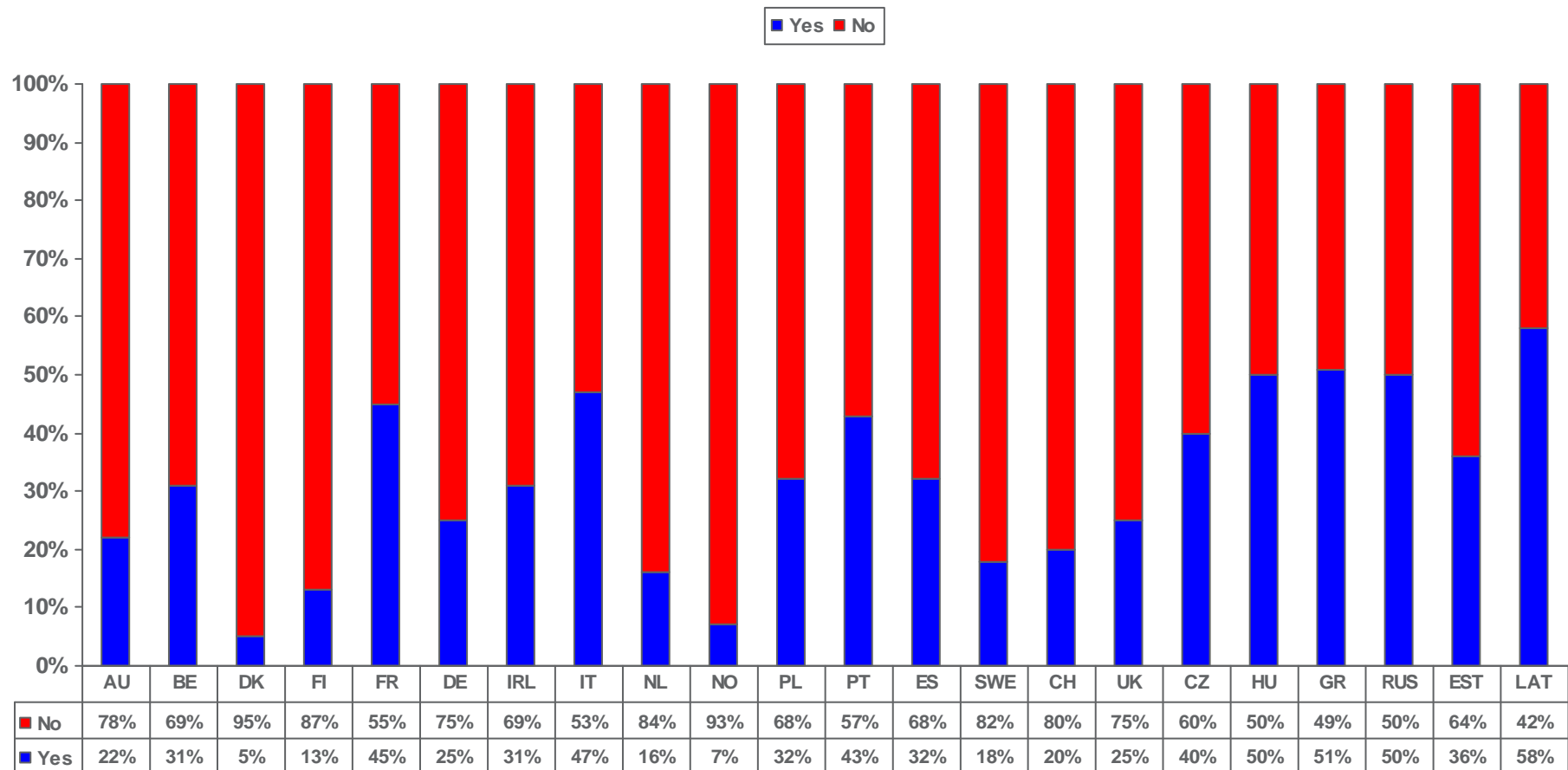


% of respondents choosing this option – more than one option could be chosen

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



# Q4. In the next year, do you expect that the global financial crisis will affect the amount of, or type of non-prescription medicines that you will use? – Europe average: Yes = 33%



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



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# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

Note: Question asked only to those responding “yes” to question 4

## 22 Country Europe Average

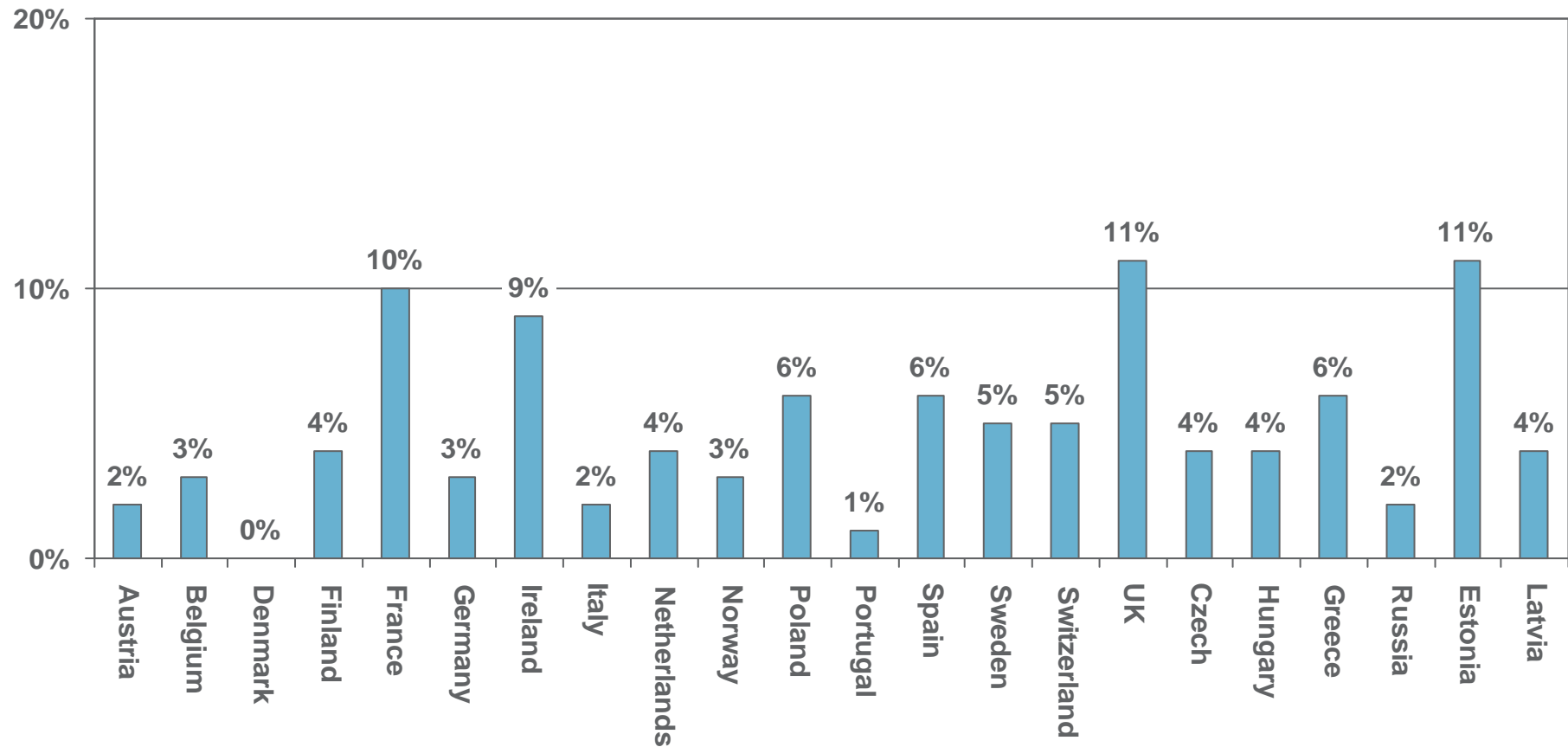


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded “yes” to question 4

# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

Note: Question asked only to those responding “yes” to question 4

## Europe – I will stop buying them

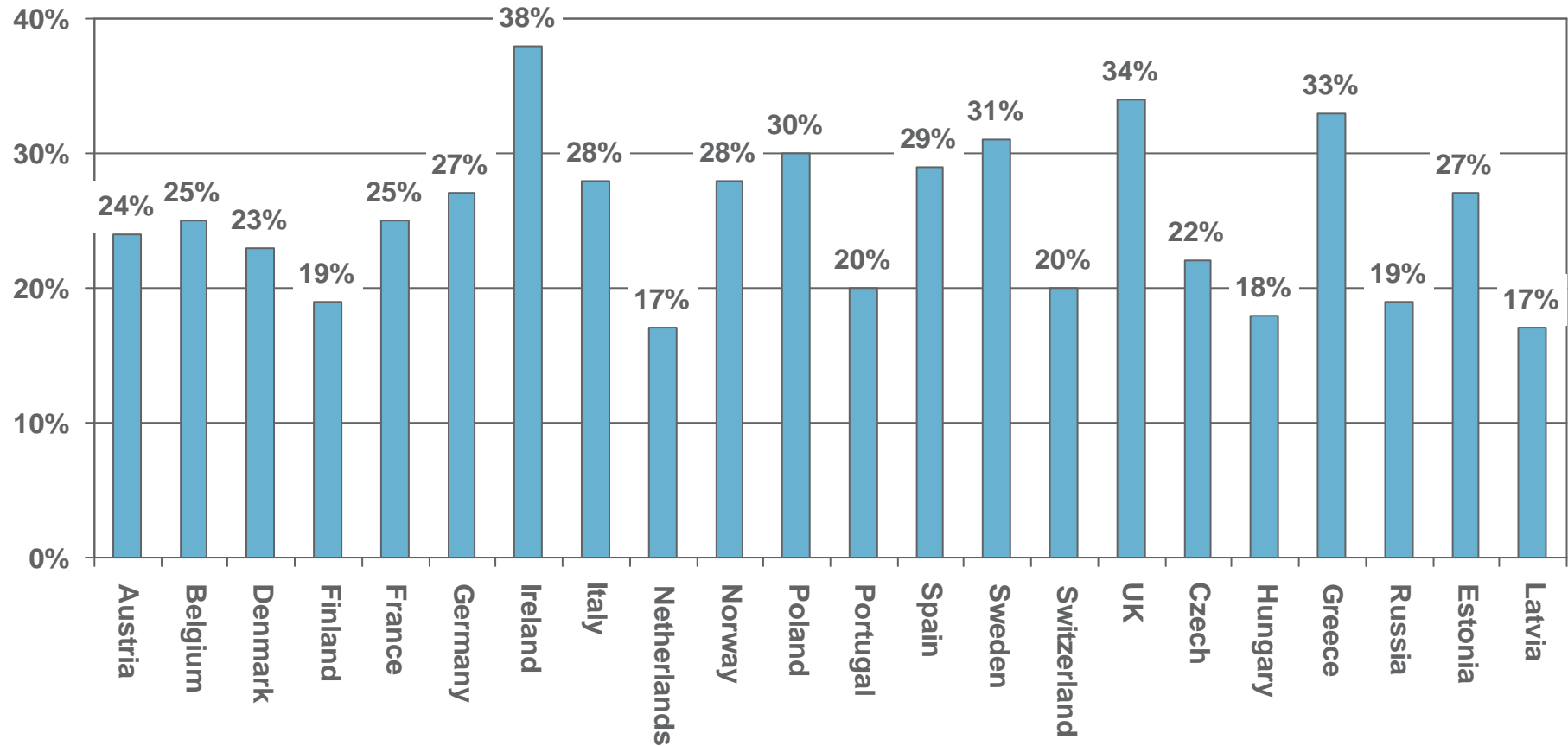


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded “yes” to question 4

# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

Note: Question asked only to those responding “yes” to question 4

## Europe – I will use them less frequently

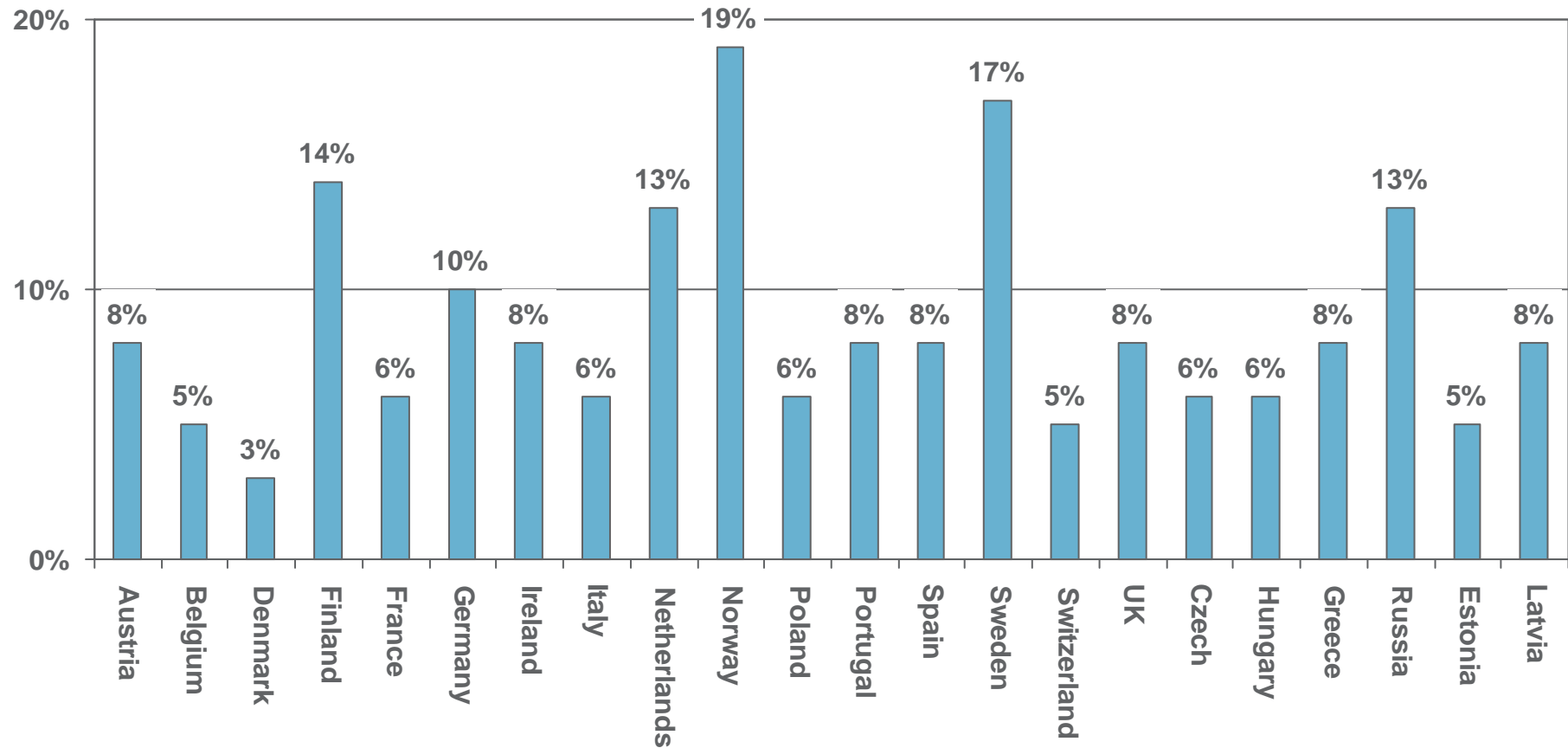


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded “yes” to question 4

## Q5. What do you think will be the main way your usage of non-prescription medicines will change?

*Note: Question asked only to those responding “yes” to question 4*

Europe – I will continue to use them, but will sometimes use less than the recommended dose

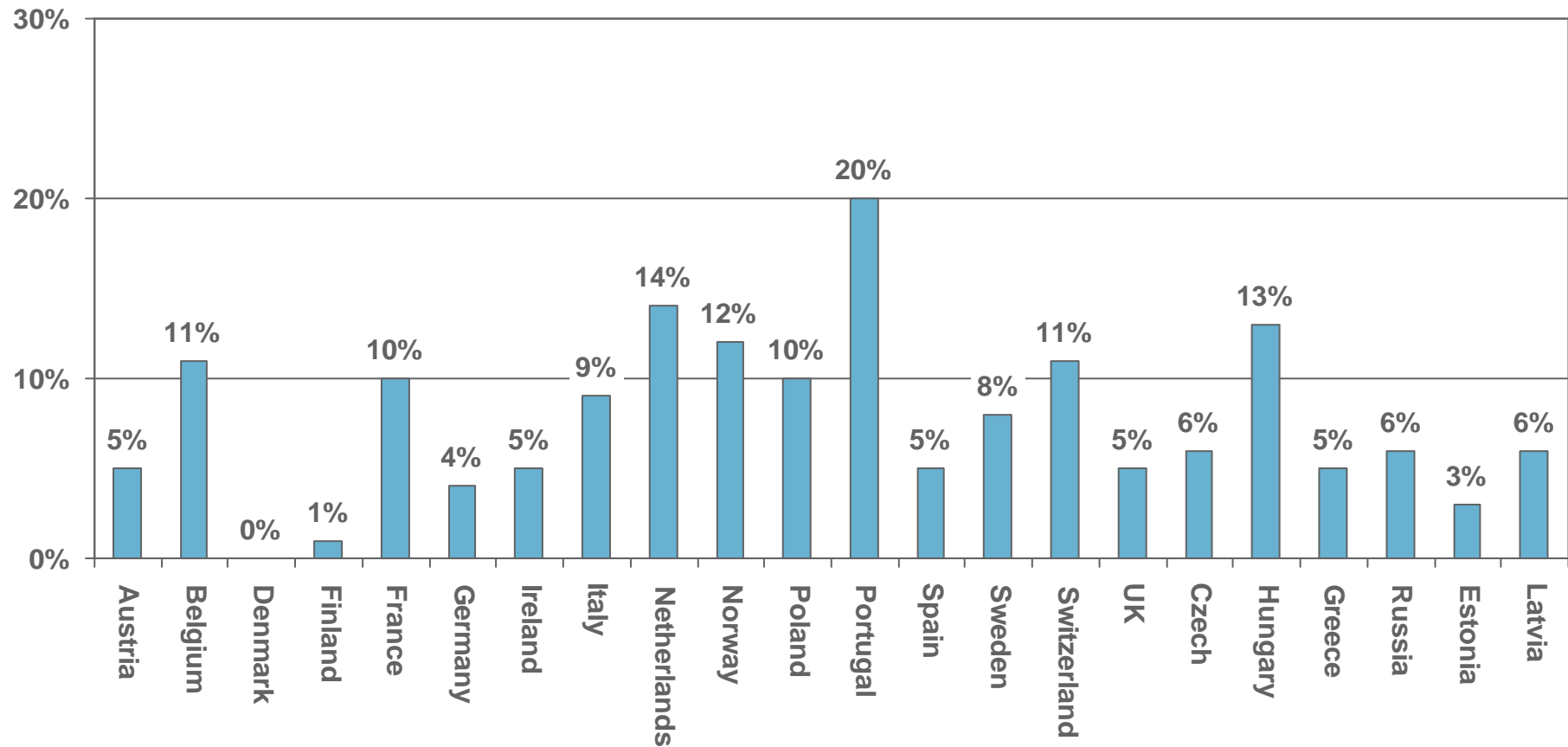


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded “yes” to question 4

# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

Note: Question asked only to those responding “yes” to question 4

## Europe – I will buy smaller pack sizes

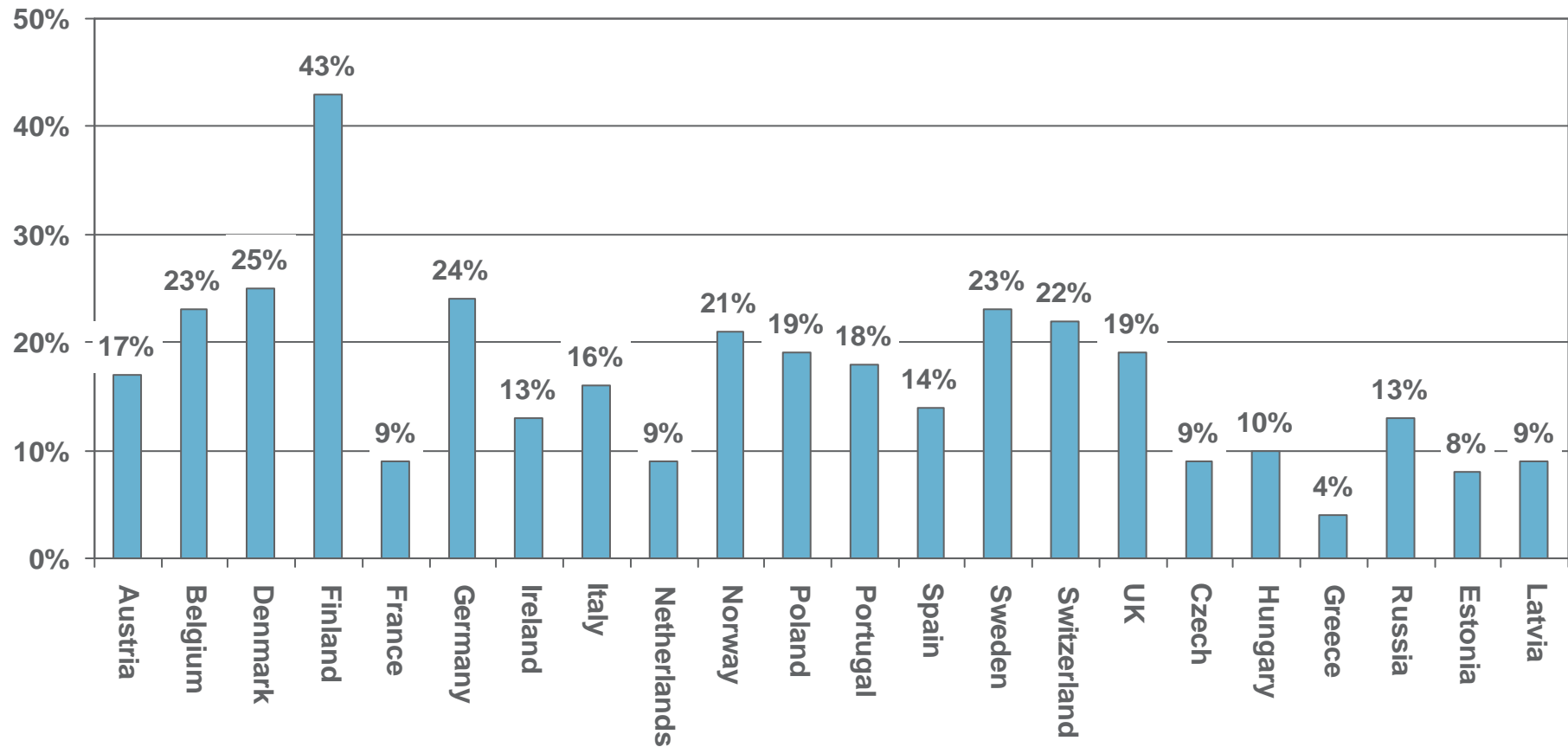


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded “yes” to question 4

# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

Note: Question asked only to those responding “yes” to question 4

## Europe – I will buy cheaper products

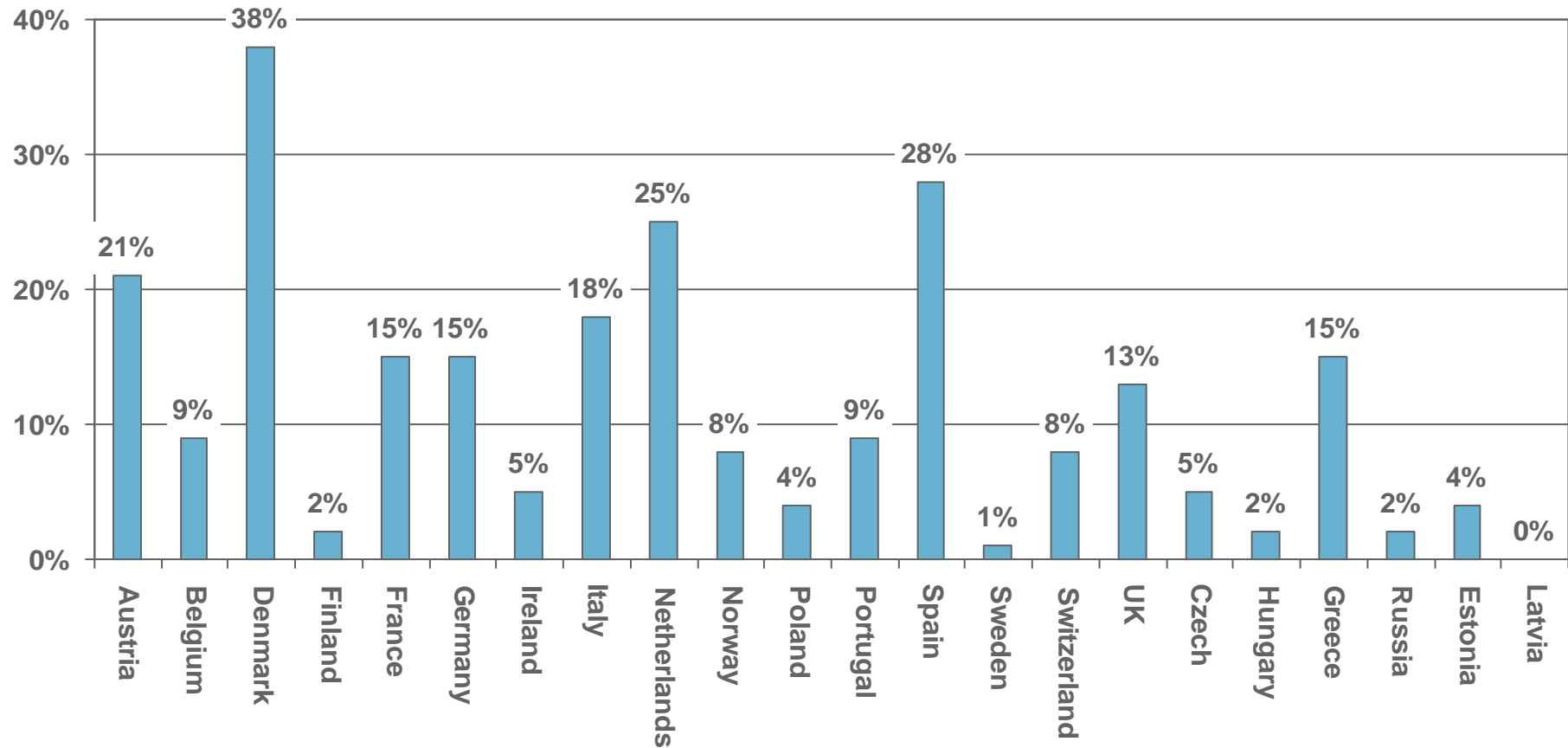


Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded “yes” to question 4

# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

Note: Question asked only to those responding “yes” to question 4

## Europe – I will visit the doctor more instead of buying them



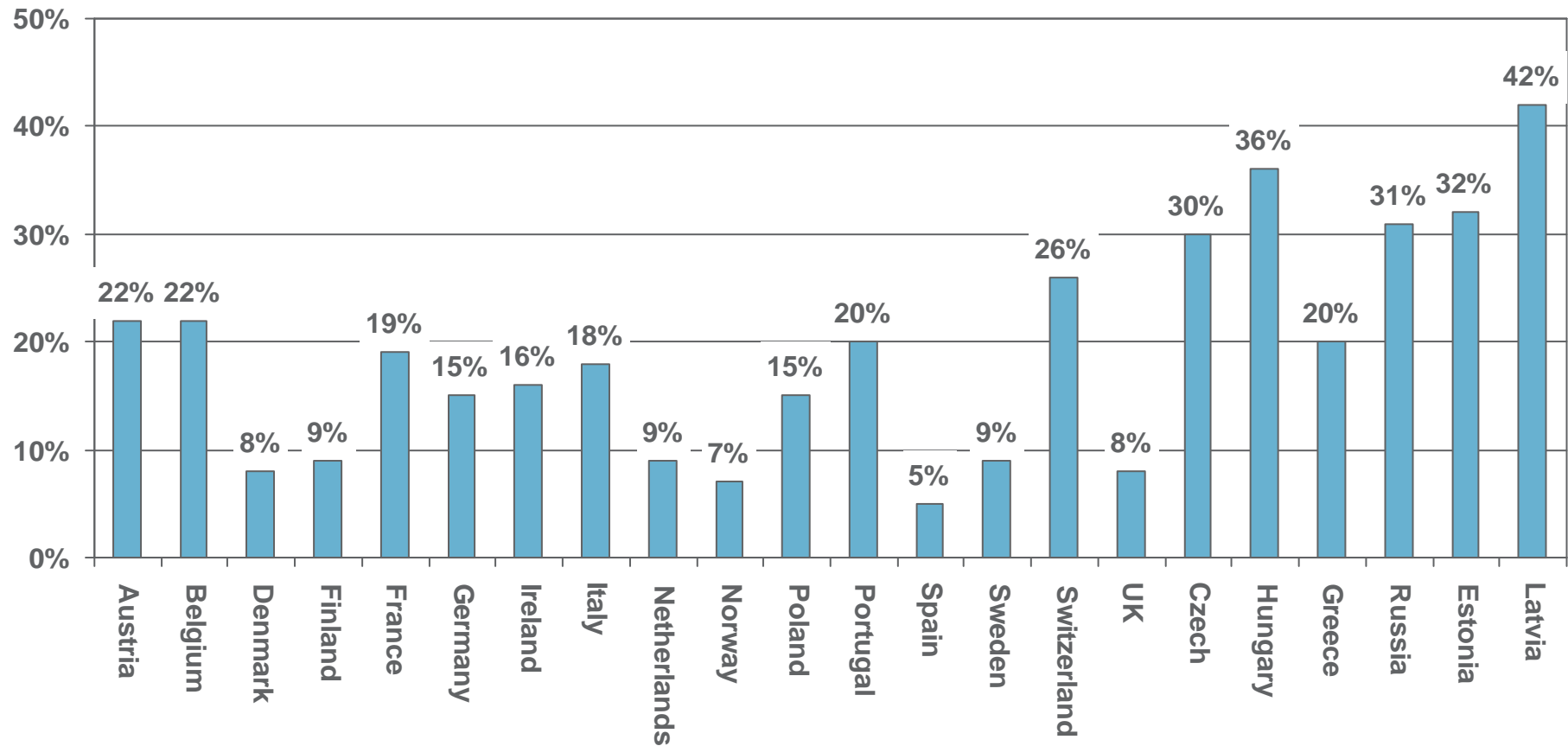
Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded “yes” to question 4



# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

*Note: Question asked only to those responding "yes" to question 4*

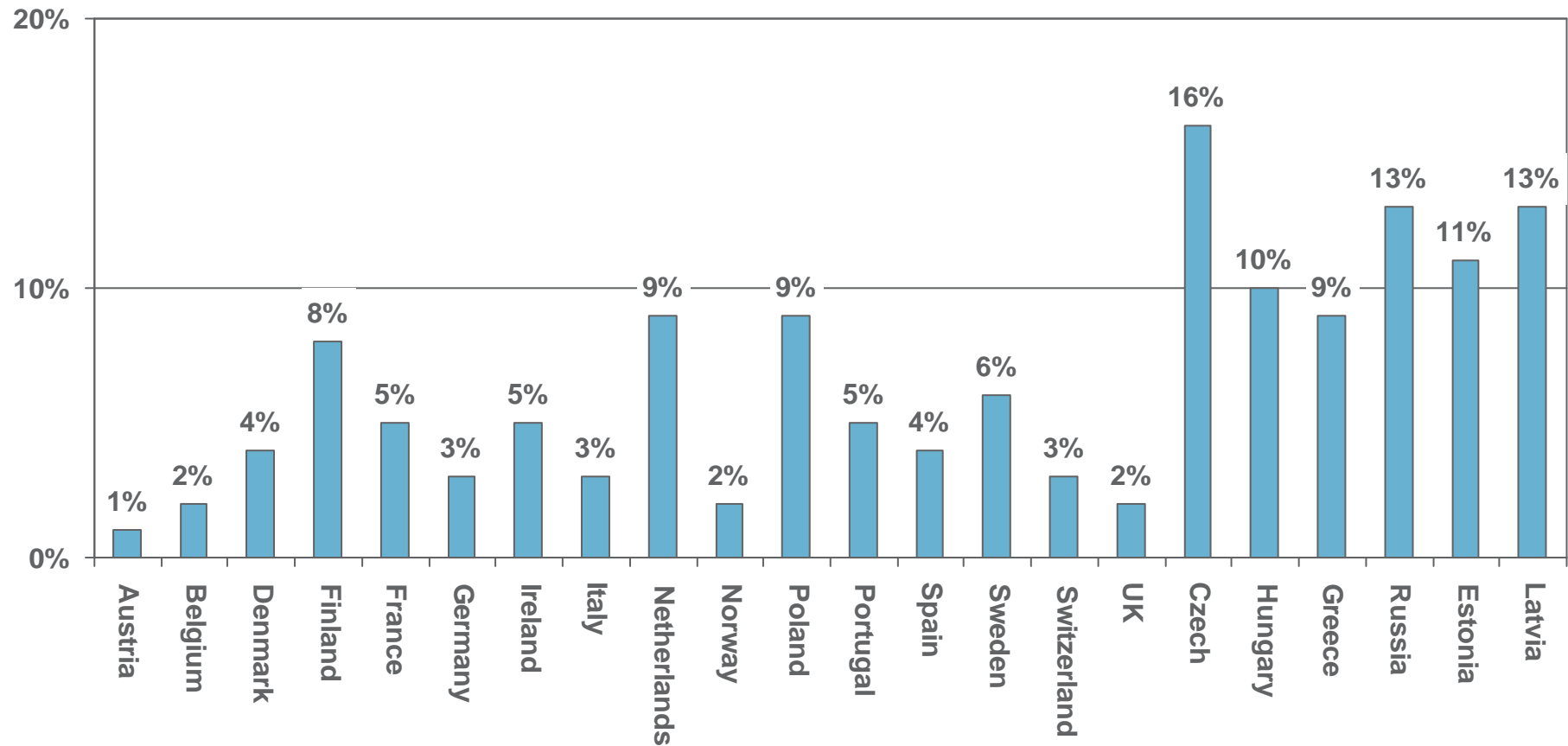
## Europe – I will use more natural and traditional remedies



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded "yes" to question 4

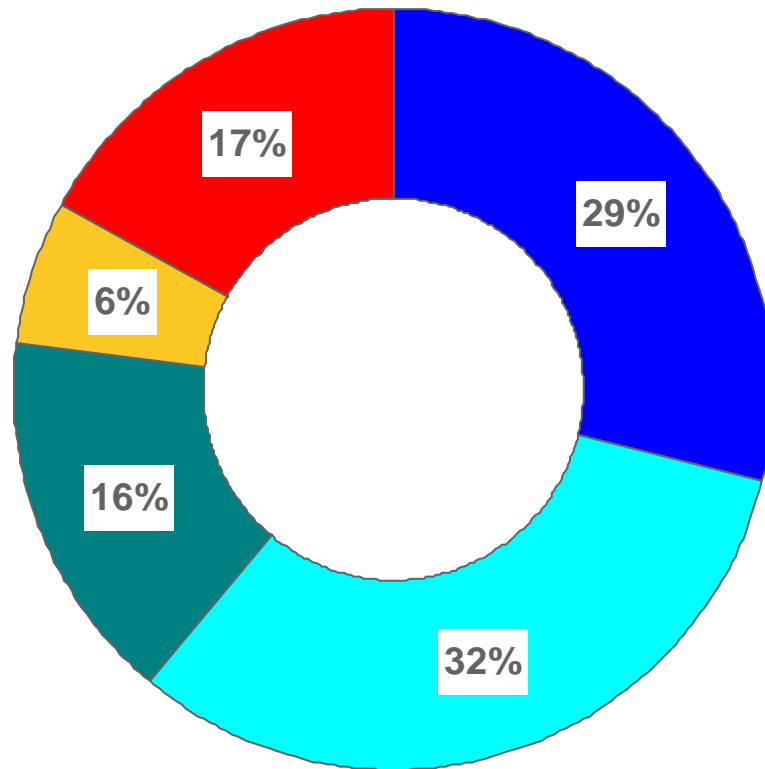
# Q5. What do you think will be the main way your usage of non-prescription medicines will change?

Note: Question asked only to those responding “yes” to question 4  
Europe – I will buy more products that help prevent me getting ill



Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide - asked only to those who responded “yes” to question 4

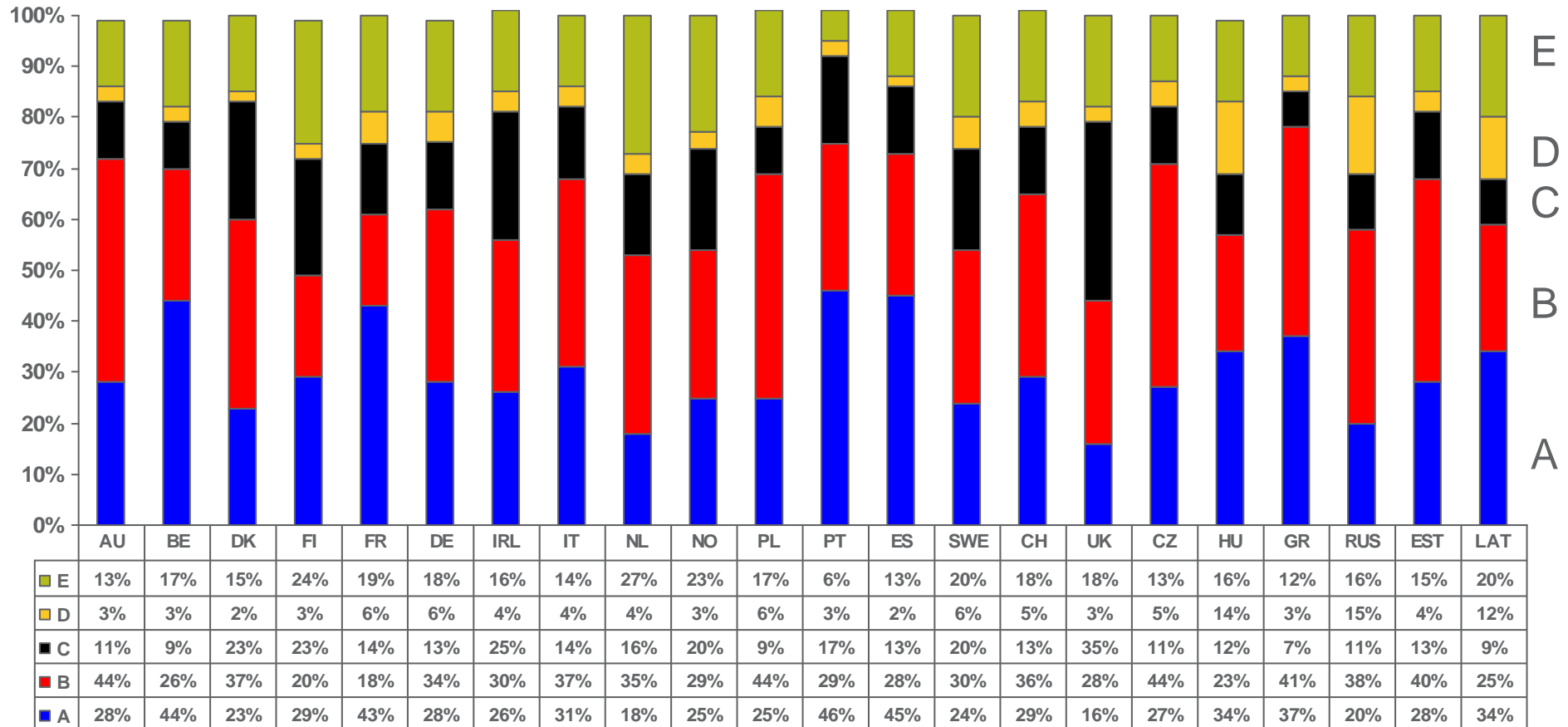
# Q6. Which of the following statements best reflects how you ensure you use a non-prescription medicine responsibly? 22 Country Europe Average



- I ask the pharmacist for advice on how to use the product
- I read the product information leaflet in the pack
- I read the usage instructions on the pack
- I look up the usage instructions on the internet
- I make my own decision based on previous experience

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide

# Q6. Which of the following statements best reflects how you ensure you use a non-prescription medicine responsibly? - Europe by country



A: I ask the pharmacist for advice on how to use the product  
 C: I read the usage instructions on the pack  
 E: I make my own decision based on previous experience

B: I read the product information leaflet in the pack  
 D: I look up the usage instructions on the internet

Source: ACNielsen Global On-Line Omnibus Mar/Apr 2009: 25,000+ respondents worldwide



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