

# A Summary Profile of the OTC Consumer

- May 2005 -

# A Summary Profile of the OTC Consumers

## Contents

Introduction.....	3
1. How people View their Health .....	4
2. Where Consumers get Health Information .....	5
3. Incidence of Common Ailments and readiness to Treat .....	6
4. How People Treat Common Ailments .....	9
5. Consumers' Use of OTC Medicines .....	13
6. Consumers' Use of Pharmacy .....	18

## Introduction

What happens when we fall ill? How important is the pharmacist in health management? Where does the GP fit in the management of minor ailments? The PAGB holds a vast amount of data about the management of minor ailments, which is available for interested parties to access.

The following is a summary profile of the data held by PAGB on the consumer and how they manage their health, their attitudes and actions taken. Most of the data is quantitative, and a short commentary is provided to highlight key points. Key data comes from BMRB, Mintel, Kings Fund and Prism (Reader's Digest) research reports, although several others are also referenced.

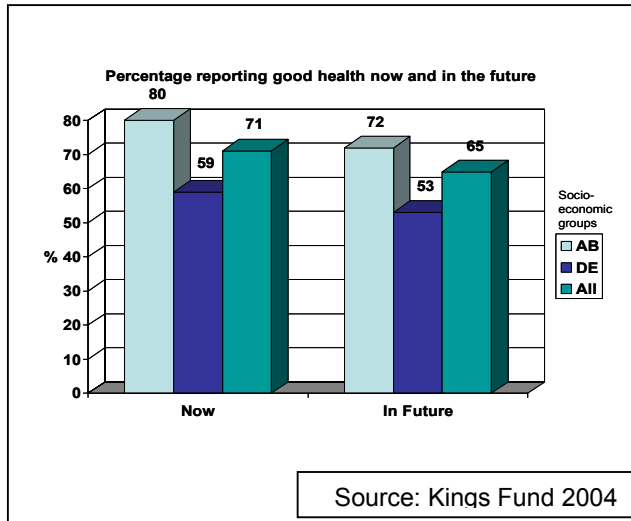
A list of the reports from which this summary is written is shown at the end, and are available from the PAGB for review.

**This profile is now being updated and extended. A fresh review will be available from PAGB in September 2005.**

**Contact Mike Owen at PAGB for full information on 0207 421 9313.**

# 1) How People View their Health

- Most people state that they are currently in good health (71%), with the majority (65%) expecting to remain so in the future<sup>1</sup>.
- Looking at the different demographic groups, a higher proportion of ABs feel they are currently experiencing good health in comparison to DEs.
  - Most ABs expect their good health to continue into the future, in



comparison with only about half of DEs.

- Those in the socio-economic groups who are least healthy and have the lowest health expectations are more likely to feel that their health is beyond their own control<sup>2</sup>.
- When asked, 88% of people agree that they are responsible overall

for their own health, and 93% agree that parents are more responsible than anyone else for the health of their children<sup>3</sup>.

- 53% agree that they should do a lot more about their health, and 30% say that they don't take care of themselves as well as they should because of a busy lifestyle.
- Under half of consumers agree that we really look after our health.<sup>4</sup>

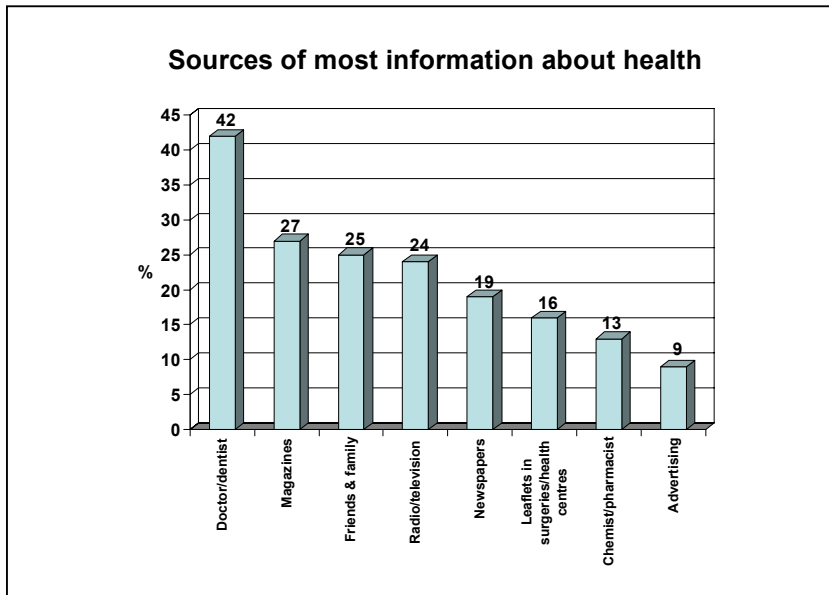
<sup>1</sup> Public Attitudes to Public Health Policy. Kings Fund 2004. Pg 9

<sup>2</sup> Public Attitudes to Public Health Policy. Kings Fund 2004. Pg 21

<sup>3</sup> Public Attitudes to Public Health Policy. Kings Fund 2004. Pg 11

<sup>4</sup> Spend on Health. Mintel March 2004. Pg 4

## 2) Where Consumers get Health Information

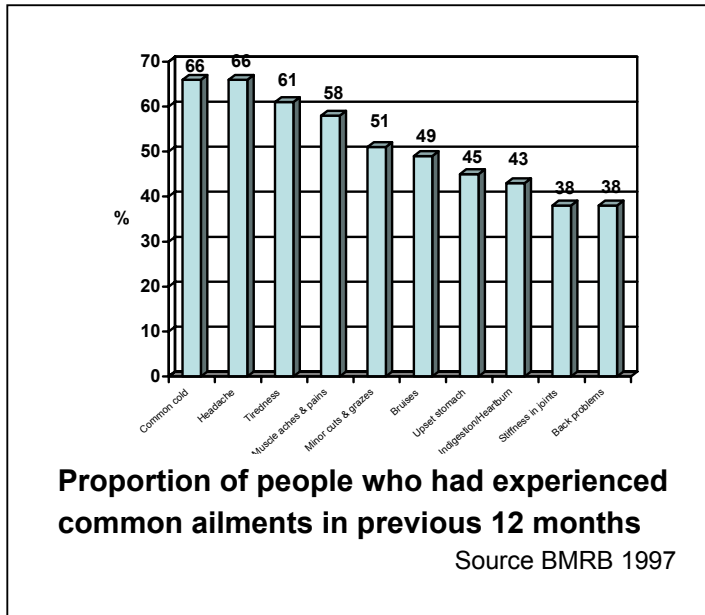


- When asked where people obtain **most** of their information about health, 42% claim it is from the Doctor or Dentist, 27% from magazines, 25% from friends and family and

24% from radio or television<sup>5</sup>.

<sup>5</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 21

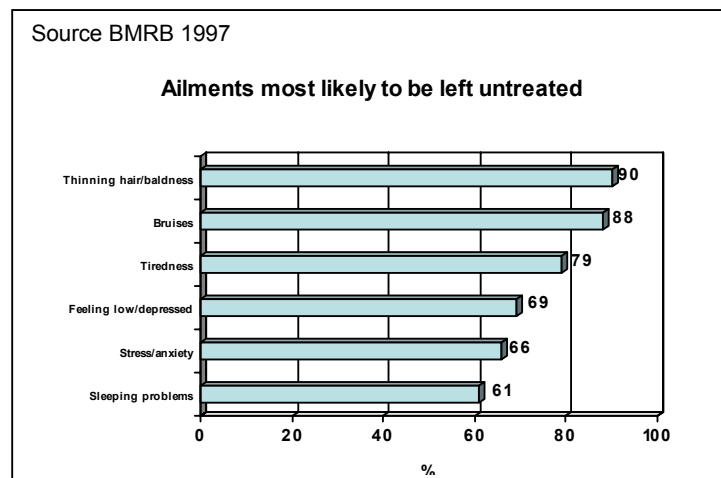
### 3) Incidence of Common Ailments and Readiness to Treat



- This chart shows the incidence of the most common minor ailments<sup>6</sup>.
  - All ailments featured in the research have OTC treatments available.
- The common cold and headache are the two most frequently suffered problems.
- The largest growth areas in terms of suffering are sleep problems, stress/anxiety and lip problems/cold sores; all outside the top 10 in terms of

incidence, but showing 10% growth in incidence of suffering over the period of measurement (1986 – 1997).

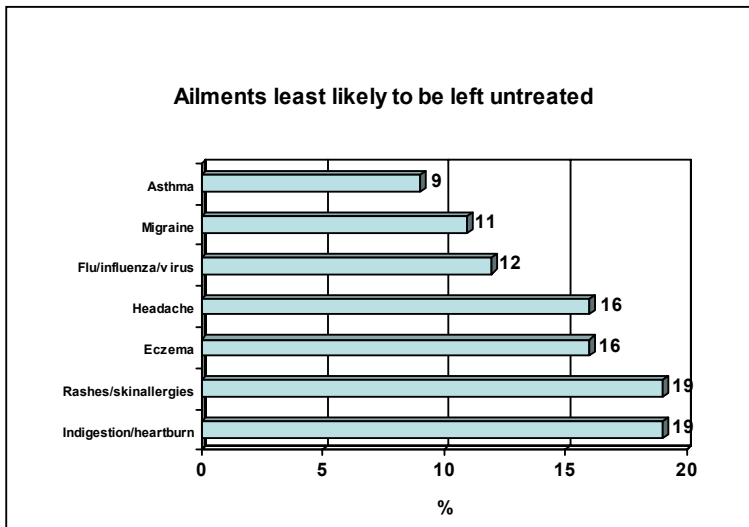
- Many sufferers do not treat these ailments, even though products for these indications are available OTC.
- Ailments which are **most likely** to be left **untreated** include those shown on this chart:<sup>7</sup>
- Insomnia and stress also feature in the least likely to be treated ailments features in other research.<sup>8</sup>



<sup>6</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 8

<sup>7</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 73

<sup>8</sup> PRISM4, Readers Digest Assoc. 1997. Ailments most and least likely to be treated.



(i.e.: unlikely to be left untreated)

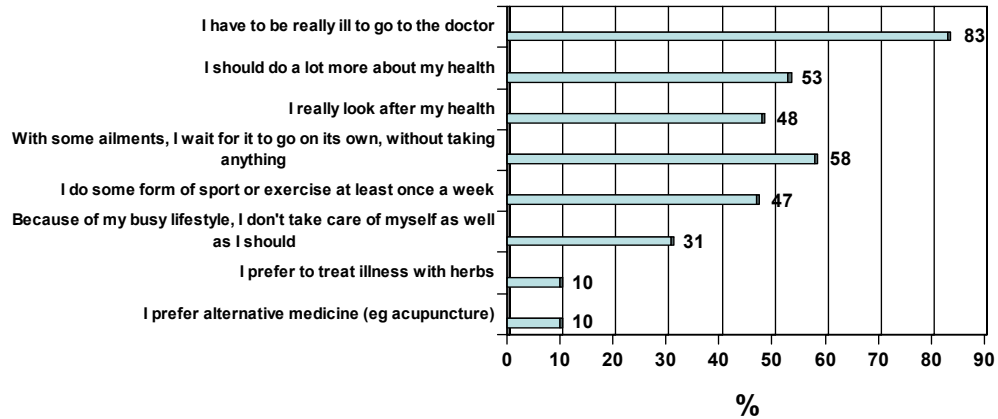
- Ailments **least likely to be left untreated** include those shown in the chart<sup>9</sup>:
  - Migraine also features in other research with 87% of sufferers always treating.<sup>10</sup>
- Sufferers are not willing to suffer the symptoms associated with these illnesses – they are aware they can do something about it and actively do so.
  - There are therefore opportunities in both the “treated” and “untreated” indications for improvement in communication about both the problem and the products available.
- The vast majority of adults consider that they have to be really ill before they go to the doctor<sup>11</sup>.

<sup>9</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 74

<sup>10</sup> PRISM4, Readers Digest Assoc. 1997. Ailments most and least likely to be treated.

<sup>11</sup> Spend on Health. Mintel March 2004. Pg 4

**Attitudes toward health and healthy lifestyle:  
Agreement with statements relating to health and healthy lifestyles, Mintel 2003**



- 58%, however, state that they wait for some minor ailments to go on their own, without taking anything<sup>12</sup>.
  - Although most people believe that it has to be something serious for them to go to the doctor as seen in the chart above, according to Mintel, half of all consumers still say they consult their doctor about minor ailments at least once a year<sup>13</sup> while Department of Health data suggests that around 40% of GP consultations are for minor ailments<sup>14</sup>.

<sup>12</sup> Spend on Health. Mintel March 2004. Pg 7

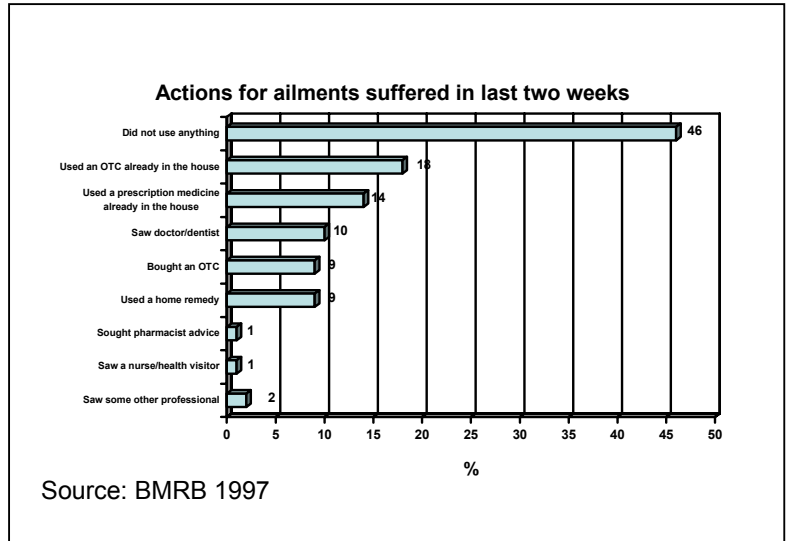
<sup>13</sup> Spend on Health. British Lifestyles 2005. Mintel.

<sup>14</sup> Self Care – A Real Choice: Self Care Support – A Practical Option. Department of Health, 266322/Self Care – A Real Choice, 2005

## 4) How People Treat Common Ailments

- This chart shows that, according to the BMRB 1997 study, almost half of minor ailments (46 %) are not treated at all by consumers.

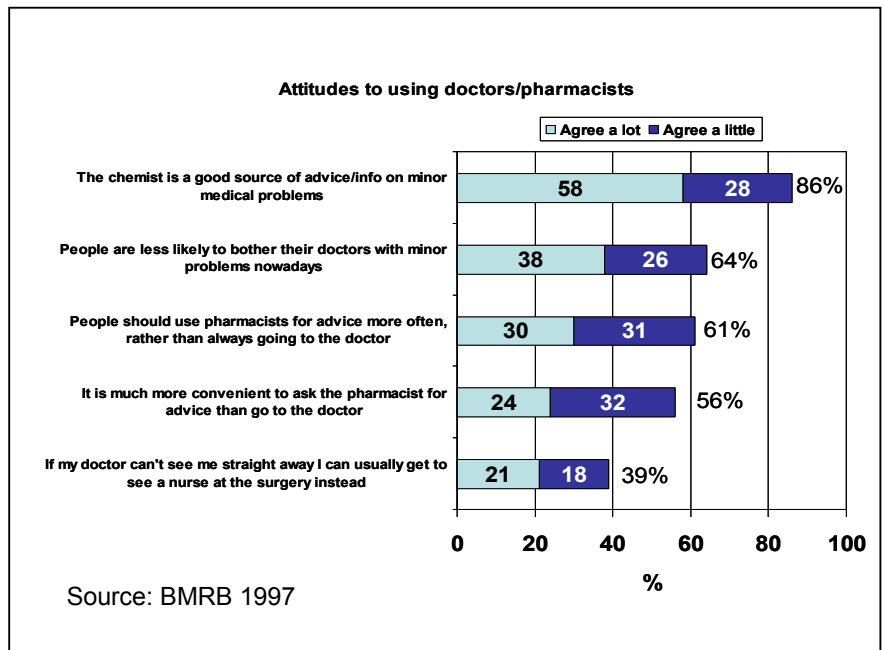
- 25% of the ailments suffered were treated using an OTC medicine (combination of 18% using an OTC already in the house, 9% buying an OTC specifically for the problem), while 10% of ailments resulted in a visit to a doctor or dentist.<sup>15</sup>



- The most common response to these everyday ailments is to use no medication of any sort; three in ten ailments were treated with either an OTC or prescription medicine already in the house and an OTC was more likely to be used than a prescription medicine.

- The vast majority of adults agree that the chemist is a good source of advice and information about minor medical problems

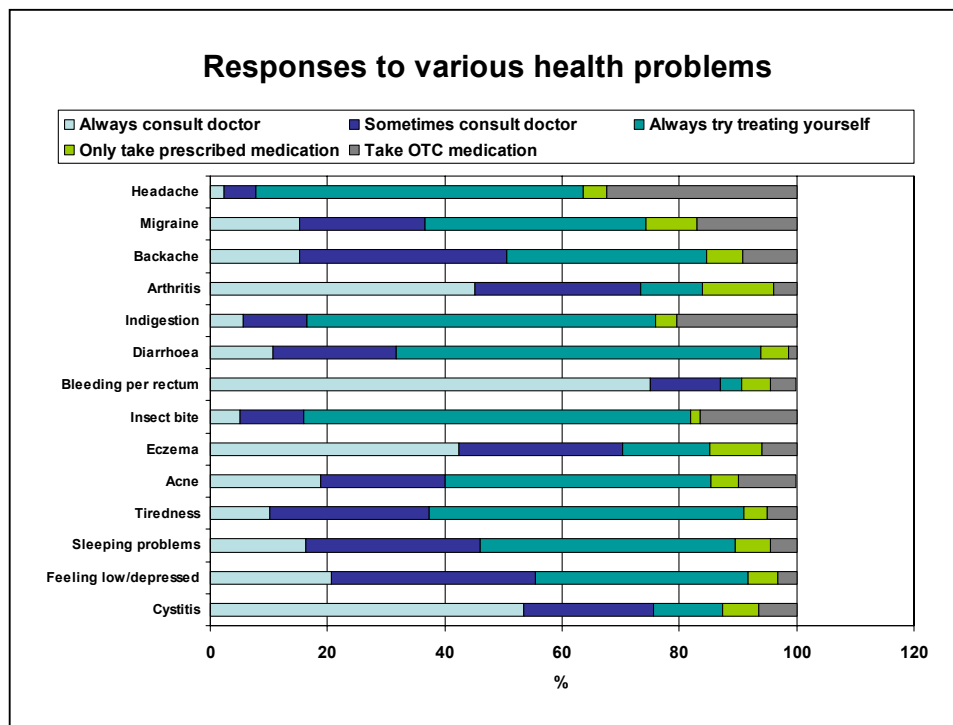
- Most also agree that people should use the pharmacist for advice more often rather than



<sup>15</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 54

always going to the doctor.<sup>16</sup>

- And they know that the pharmacist is more accessible: 56% agree that it is much more convenient to ask the pharmacist for advice than to go
- Having seen the doctor, more than three-quarters of patients (78%) felt that they had wasted the doctor's time when they were told to buy something you can get without a prescription.<sup>17</sup>
- Despite this response, 40% of GP consultations are for minor ailments, while 75% of A&E attendances are for minor illness or injury<sup>18</sup>.



- The above chart shows that patients consult a doctor for more serious conditions, using an OTC product for the less 'serious' conditions,<sup>19</sup> but they don't exclude chronic conditions not considered to be 'serious' from OTC medication.

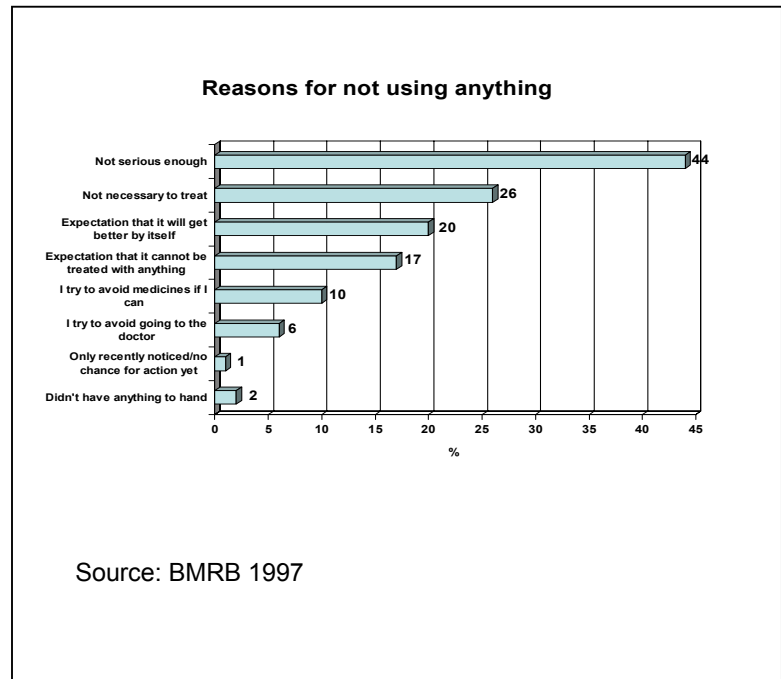
<sup>16</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 15

<sup>17</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 16

<sup>18</sup> Self Care – A Real Choice: Self Care Support – A Practical Option. Department of Health, 266322/Self Care – A Real Choice, 2005

<sup>19</sup> Attitudes and Behaviour of Doctors and Patients with regard to OTC Medicines. University of Birmingham, 1996. pg 41

- With no action taken in 46% of cases when suffering a minor ailment<sup>20</sup>, a variety of reasons were given for this inaction:<sup>21</sup>



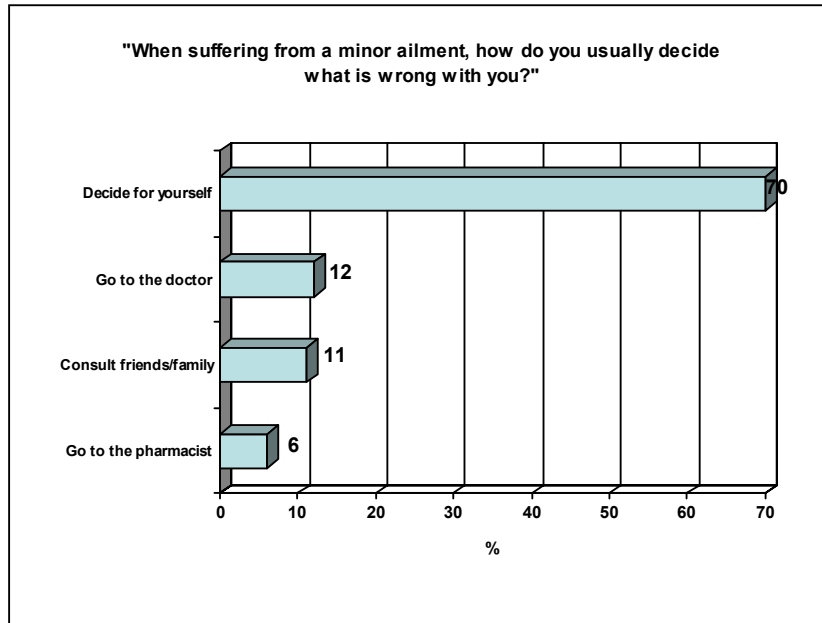
- In qualitative research undertaken amongst OTC users, the more severe the ailment and the longer it lasted, the more likely it is that they would visit the GP; if an ailment is painful, irritating or annoying and is getting in the way of everyday activities, the more likely it is that the problem is treated with an OTC remedy<sup>22</sup>.
  - The decision on whether or how to treat is based on an assessment of the severity of the illness, whether the sufferer knows what is wrong and whether it will go away without treatment.
  - OTC's also tend to be distress purchases, unless the sufferer has the problem on a regular basis (indigestion, allergic reaction); the exception is analgesics, which are planned purchases and medicine cabinet staples.

<sup>20</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 54

<sup>21</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 66

<sup>22</sup> Busy people and their attitudes towards OTCs. Kember Associates July 2004

- When people suffering from a minor ailment were asked how they decide what is wrong with them, most (70%) decide for themselves, with 12% going to the doctor, 11% consulting friends or family and only 6% asking the pharmacist.<sup>23</sup>

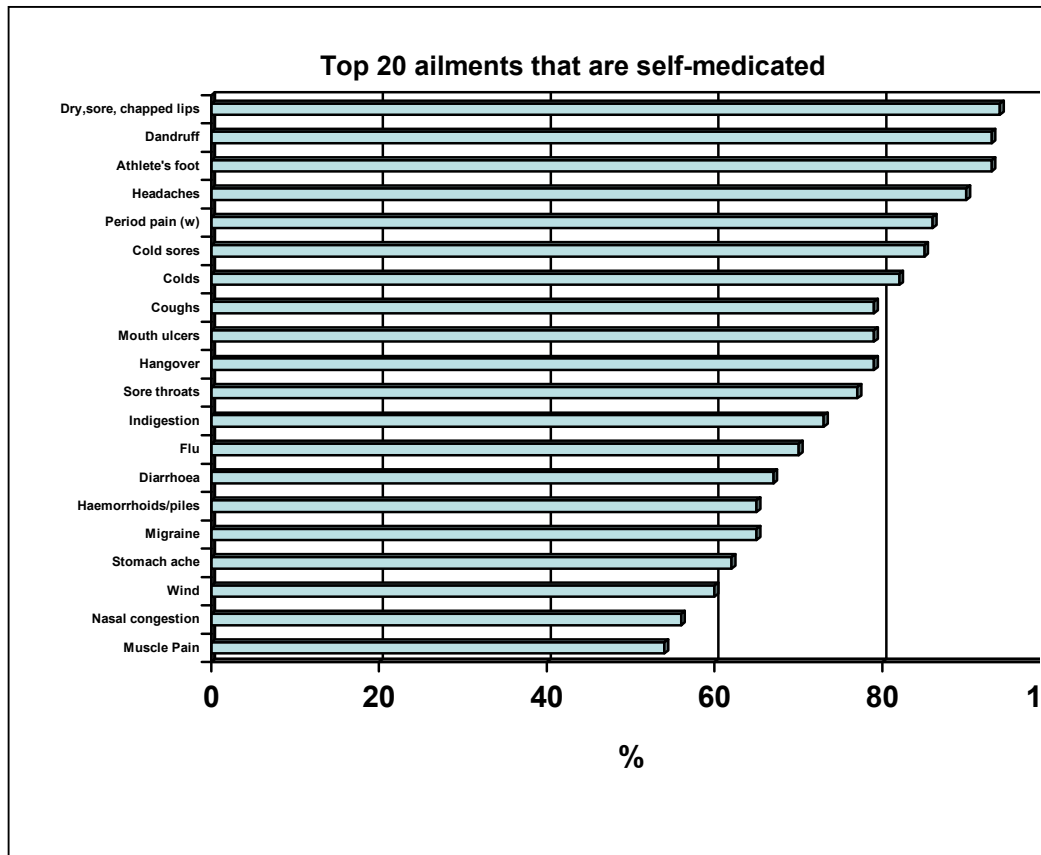


---

<sup>23</sup> PRISM4, Readers Digest Assoc. 1997. The Diagnosis.

## 5) Consumers' Use of OTC Medicines

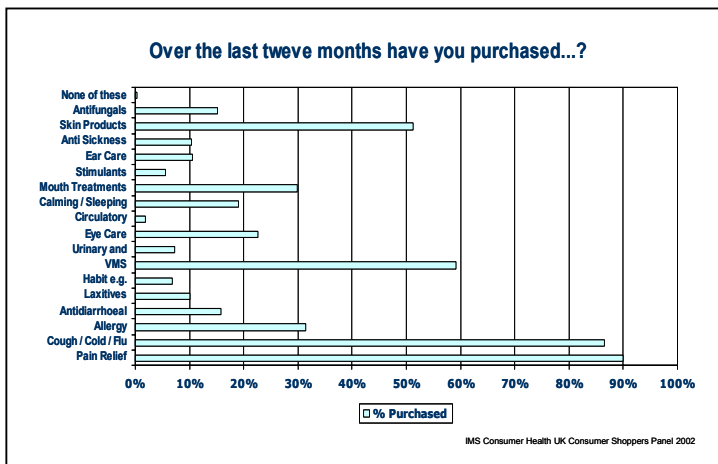
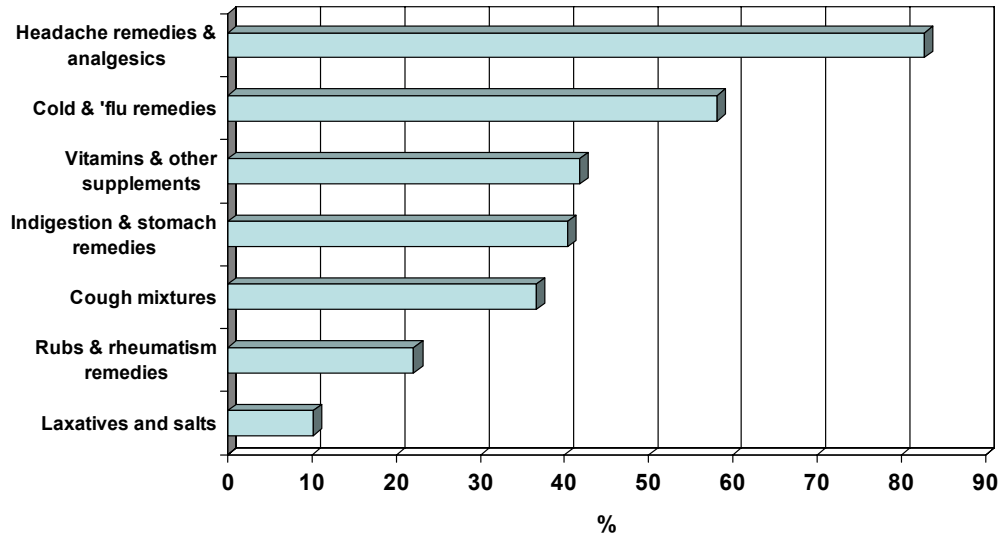
- The table below shows which common ailments are treated most often by consumers with an OTC medicinal product (based on Prism data 1997)



- The data is ranked by % of sufferers who ever treat the problem and who self-medicated on the most recent occasion it occurred.

- This data is also consistent with the indications mentioned by UK consumers who said they used OTC products according to a Mintel study in 2004<sup>24</sup>.

**Proportion of UK consumers who said they used OTC products in 2004**



- IMS Shopper research highlights similar categories in terms of OTC treatments purchased<sup>25</sup>:
  - “none of these” is almost zero.

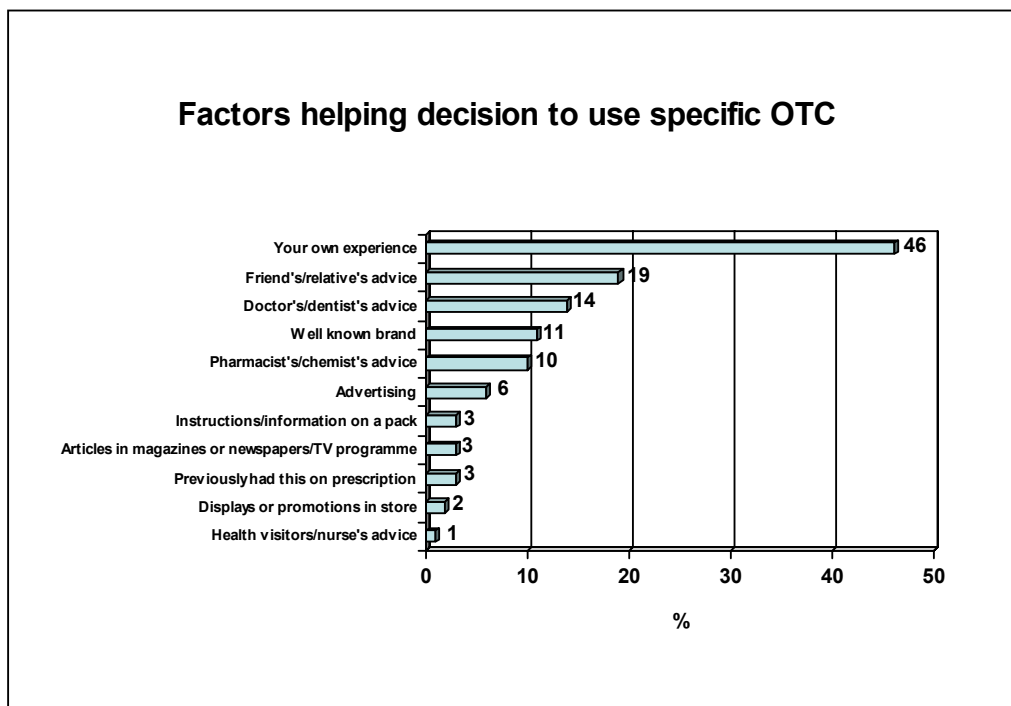
- Users are confident with OTC medicines once used: nine in ten OTCs were described as very or quite effective with over 90% of OTCs being used again for the same problem.<sup>26</sup>

<sup>24</sup> Spend on Health. British Lifestyles 2005. Mintel

<sup>25</sup> IMS Consumer Health UK: Consumer Shoppers Panel. 2002

<sup>26</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 86

- When people choose a specific OTC medicine to treat their ailment, there are a number of factors that influence their decision:
  - 46% of people cite their own experience as being a major decision making factor: if it works, they will use it again.



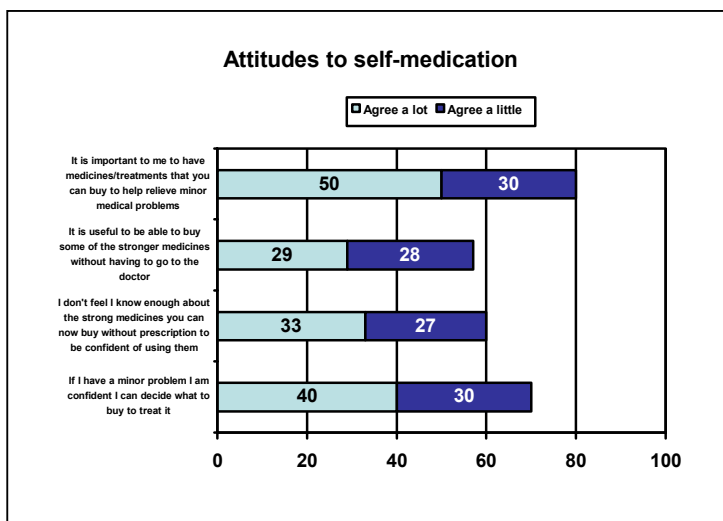
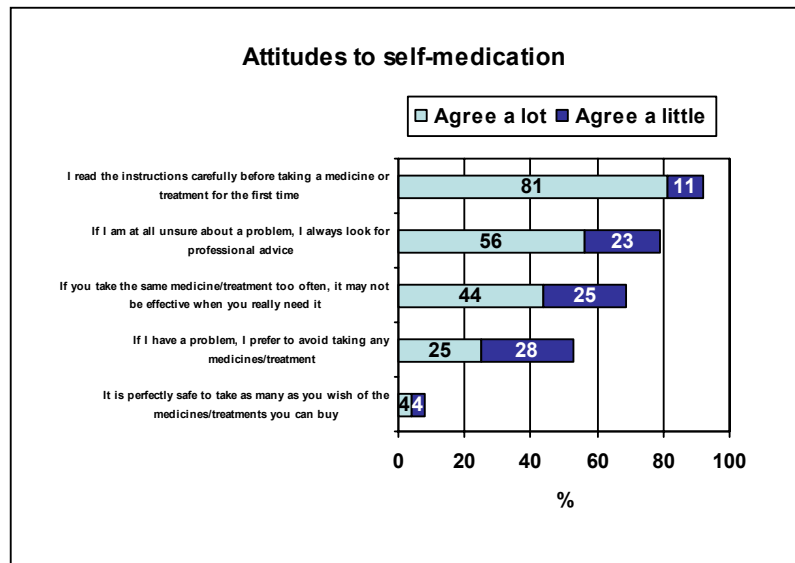
- 10% ask the pharmacist and only 6% claim to be influenced by advertising.<sup>27</sup>
- Most OTC purchases are distress buys, and many people claim to buy from pharmacy, however, there is often a strong element of habit in purchasing with people building a small portfolio of products that they know from their own experience work for them.<sup>28</sup>
  - The buying of analgesics, unlike many other OTCs, tends to be planned.<sup>29</sup>

<sup>27</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 84

<sup>28</sup> Busy People and their Attitudes towards OTCs – Kember Assoc. July 2004 pg 27

<sup>29</sup> Busy People and their Attitudes towards OTCs – Kember Assoc. July 2004 pg 6

- 79% of people claim that, if they are at all unsure about a problem they always looked for professional medical advice. However, more than half (53%) stated that if they had a problem they preferred to avoid taking any medicines / treatment.<sup>30</sup>
- The vast majority (92%) of people say that they read the instructions carefully before taking a medicine or treatment for the first time.<sup>31</sup>



- Having said that, more than half avoid taking any medicines / treatment, the vast majority (79%) agree that it is important to have medicines to help relieve minor medical problems available to buy, and 70% are confident that they could

decide what to buy to treat a minor problem.<sup>32</sup> - so people are aware that the medicines are available, but are not actively seeking them out.

- 68% also agreed that for some problems the treatments you can buy are just as effective as those that you get from a doctor, with 38% agreeing that they are good value for money.<sup>33</sup>

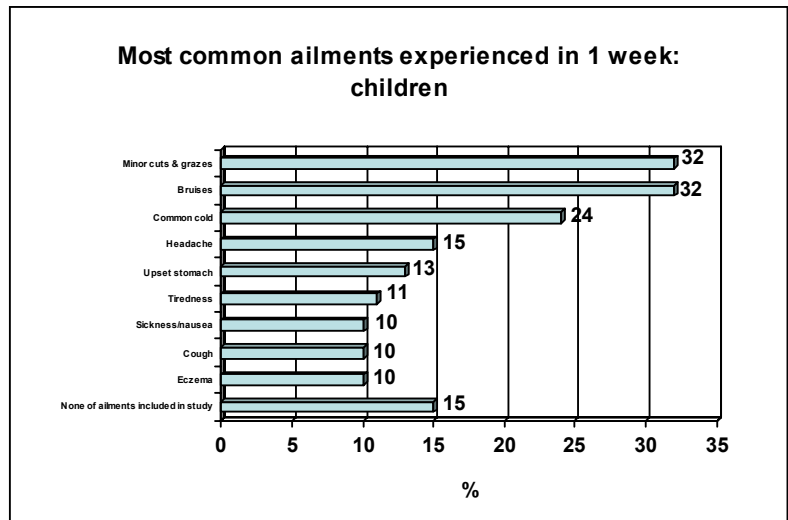
<sup>30</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 17

<sup>31</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 17

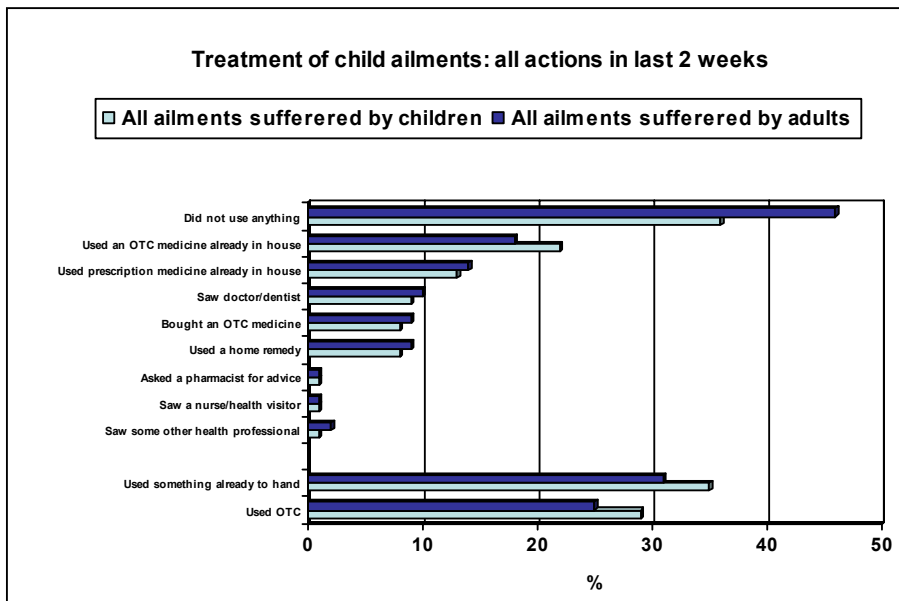
<sup>32</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 18

<sup>33</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 19

- For children, the ailments which tend to be most common, whilst having some similarities, can be rather different from those suffered by adults
  - They include those shown on the chart.<sup>34</sup>



- The actions taken to treat childhood ailments were also slightly different from the actions taken to treat adult ailments:



- 22% used an OTC already in the house compared to 18% of adults.
- 36% did not use anything compared to 46% in adults.
- Interestingly, 9% saw a doctor (this percentage rose to 12% in the under 5s), compared to 10% of adults, but still only 1% asked a pharmacist, the same percentage as adults.<sup>35</sup>

- In 2003, 10% of adults stated that they preferred to treat their illness with herbs, and almost 10% prefer to use alternative therapy, e.g. acupuncture.<sup>36</sup>
- 28% of people cashing a prescription will also choose to purchase their dietary products from the pharmacy based on the fact that they can receive advice from the pharmacist or staff.<sup>37</sup>

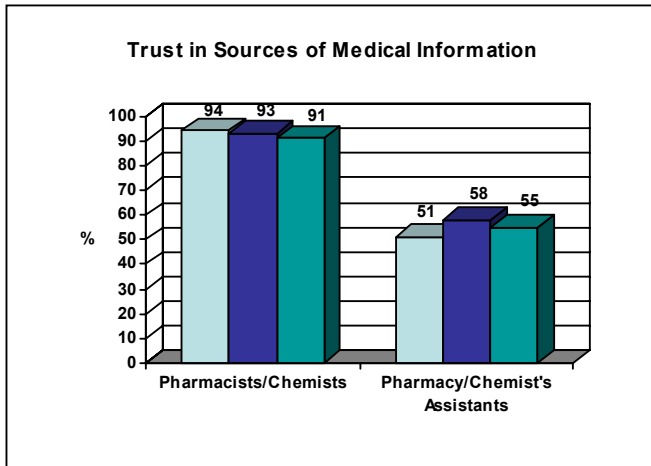
<sup>34</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 92

<sup>35</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 99

<sup>36</sup> Spend on Health. Mintel March 2004. Pg 4

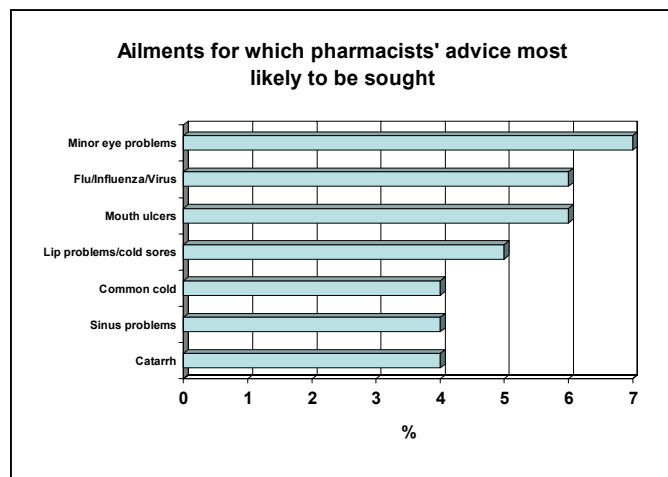
<sup>37</sup> Survey on Usage of Prescription Pharmacies in the UK. OFT 2003. Pg 126

## 6) Consumers' Use of Pharmacy



- Most people trust the pharmacist as a source of medical information.<sup>38</sup> Asking a pharmacist for advice, despite the high regard people tend to show for the quality of advice given, is in actuality, quite a rare occurrence.

- Adults are twice as likely to trust a pharmacist as an assistant.
- Ailments for which a pharmacist's advice is most likely to be sought are shown on the chart.<sup>39</sup>



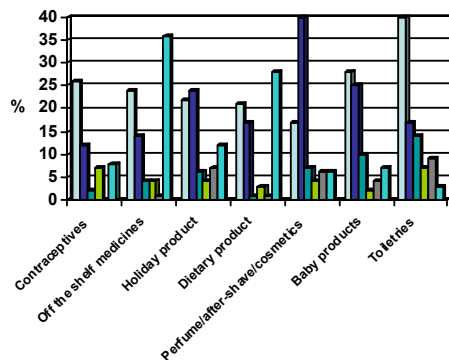
- According to Health Which, 74% of people believe that pharmacists are a trustworthy source of advice about medicines, but people are less likely to turn to pharmacists for general health advice<sup>40</sup>. Only 11% had asked for advice about a medical problem or about whether they needed to see a doctor. Just 2% had sought advice on tests available at pharmacies, indicating that there is still a lot of work to do to persuade the consumer about the capabilities and services offered by pharmacists.

<sup>38</sup> PRISM4, Readers Digest Assoc. 1997. Trust in sources of Medical Information.

<sup>39</sup> BMRB International Report: Everyday Healthcare 2. Oct 1997. Page 80

<sup>40</sup> Pharmacy Make-Over. Health Which October 2003 Pgs 10-13

### Reasons for Buying from the Chemist



- 36% of people cashing prescriptions bought their OTC medicines from a pharmacy based on the advice available from the pharmacist and staff.<sup>41</sup>

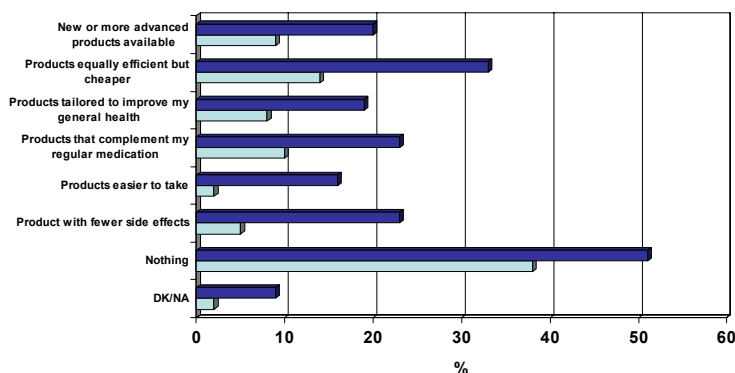
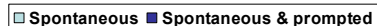
➤ The main reason for buying dietary and 'off-the-shelf' medicines from the pharmacy is because advice is available.

➤ Convenience also scores very high as a reason to purchase: these customers are already presenting a prescription.

- The type of advice desired from a pharmacist is shown on the chart.<sup>42</sup>

➤ 60% of people would like to receive more advice from the pharmacist, but purchasers clearly don't know what they could ask of the pharmacist.

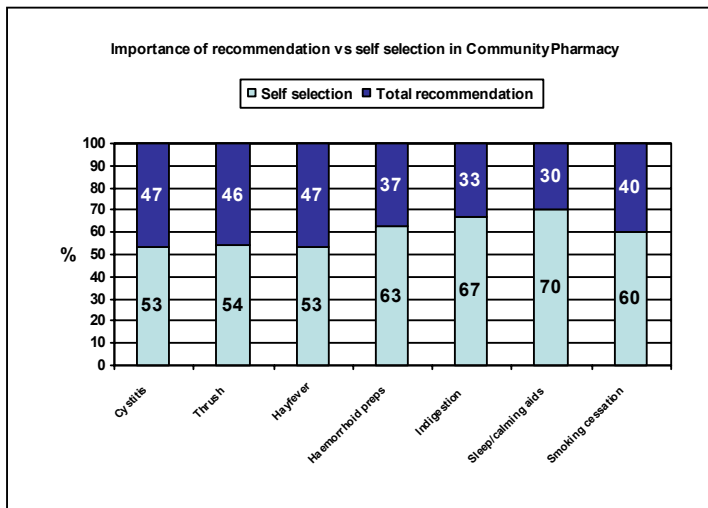
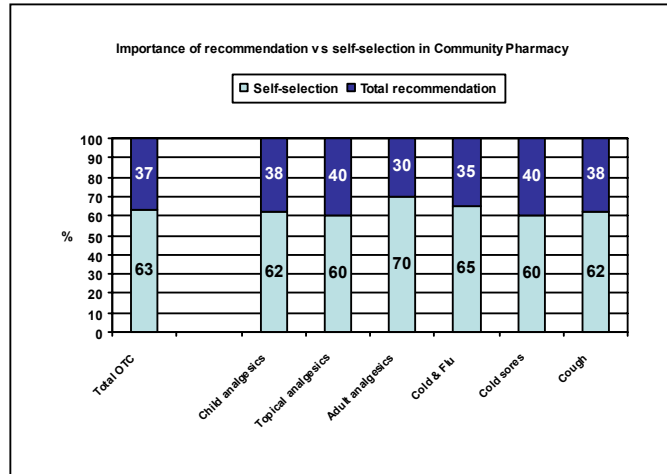
### Type of advice desired from pharmacist



<sup>41</sup> Survey on Usage of Prescription Pharmacies in the UK. OFT 2003. Pg 126

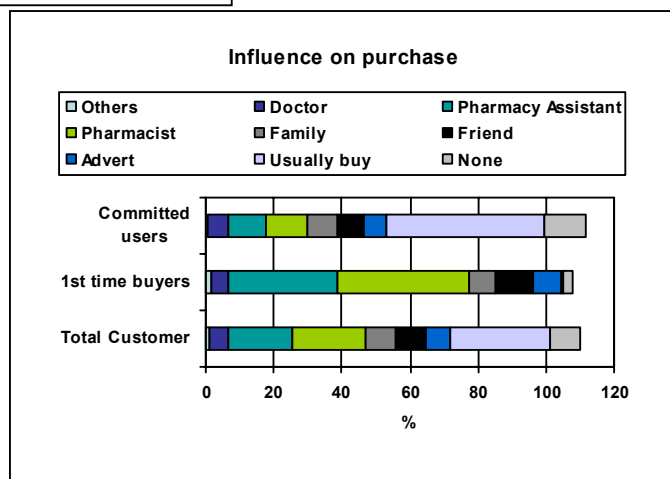
<sup>42</sup> Ipsos study on European consumer attitudes to OTC products purchased at pharmacies. UK. 2002

- 37% of all OTC medicines are purchased via a recommendation from the pharmacy.<sup>43</sup>
  - It is also interesting to note that the two largest OTC categories, analgesics and cold & 'flu, have the lowest levels of recommendation at 30% and 35% respectively: this are high self-select categories where customers are confident with their treatment.



- Certain therapy classes demonstrate high levels of recommendation, in particular the highly seasonal hayfever market at 47% along with two female conditions: cystitis (47%) and thrush (46%)<sup>44</sup>.

- Of those customers buying an OTC product for the first time cite the recommendation in pharmacy as being their influence on purchase<sup>45</sup>.

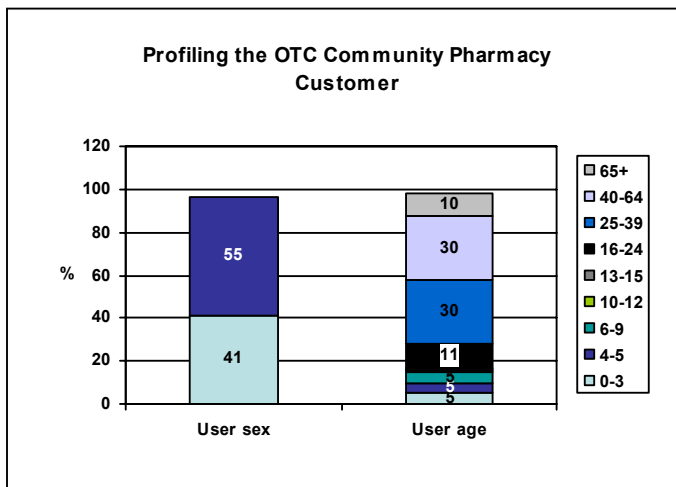
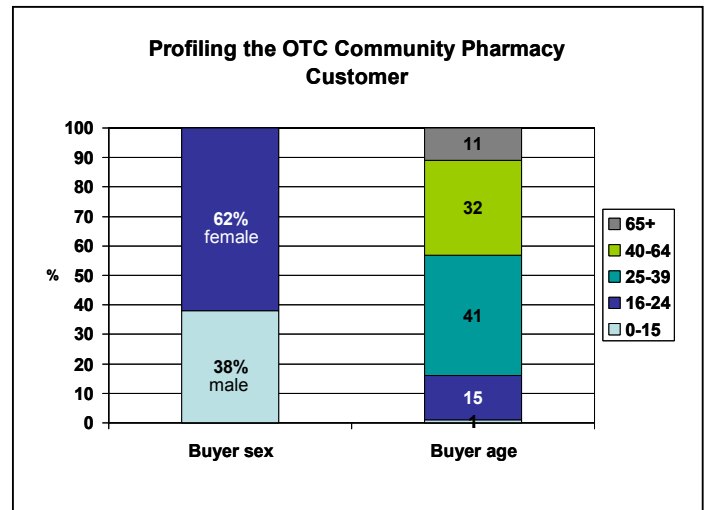


<sup>43</sup> Taylor Nelson Counterpoint. MAT to December 2004.

<sup>44</sup> Taylor Nelson Counterpoint. MAT to December 2004.

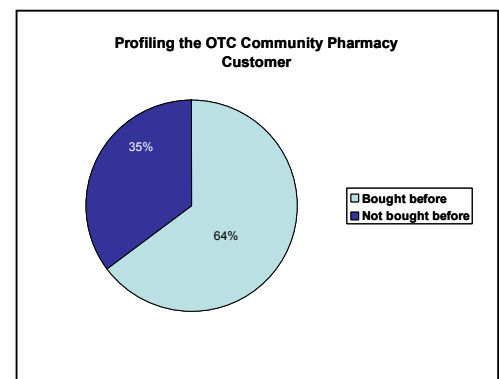
<sup>45</sup> Profiling the OTC Community Pharmacy Customer. TNS Counterpoint MAT to December 2004.

- Approaching  $\frac{2}{3}$  of buyers in community pharmacy are female, but only 1 in 10 are over 65 years old. <sup>46</sup>



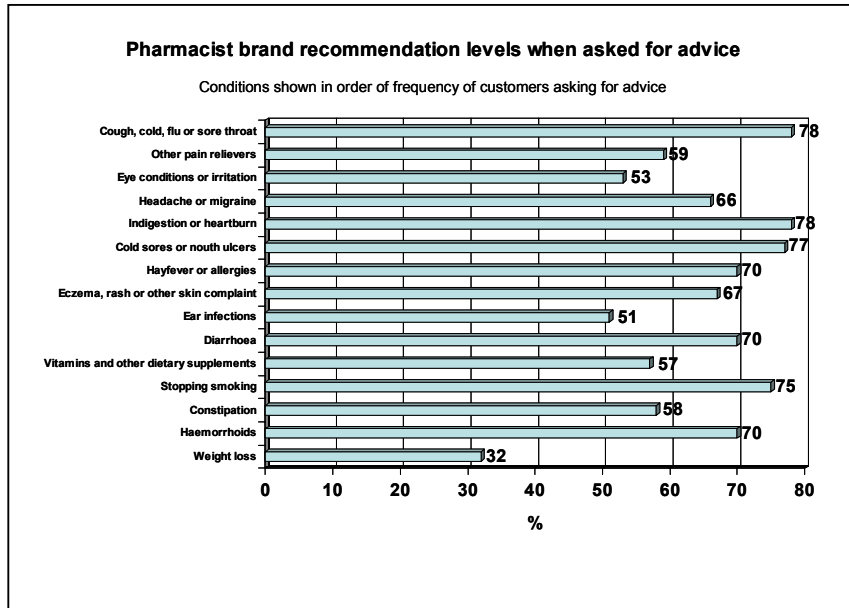
- This data also highlights that women do most of the OTC purchasing, buying not only for themselves, but for their men and children too.
  - The product usage and who it is for are dependent on the therapy area.

- Nearly two thirds of all medicines are repeat purchases; this is identical to the figure for the number of consumers who self-select their medicines and one could anticipate such a correlation.



<sup>46</sup> Profiling the OTC Community Pharmacy Customer. TNS Counterpoint MAT to December 2004.

- 23% of customers who asked for a product by name displayed evidence of dissatisfaction at being questioned about their purchase<sup>47</sup>, indicating a continuing need to create awareness about the legal status and requirements associated with the sale of medicines.



- According to the purchasing public, when asking for advice on particular ailments, pharmacists have a tendency to recommend a specific brand:<sup>48</sup>

## ***Use of Pharmacy Assistants***

- Over 70% of consultations in pharmacy concerning minor ailments are dealt with solely by the pharmacy assistant.<sup>49</sup>
  - Usually the Assistant gave advice and recommended medicines without consulting the pharmacist, only on 33% of occasions was the pharmacist involved when the customer was seeking advice.<sup>50</sup>
- Between 51% and 58% of adults said they trust pharmacy assistants as a source of medical information.<sup>51</sup>

<sup>47</sup> Research Project: The Role of the Pharmacy Counter Assistant. University of Bristol 2003, pg 5

<sup>48</sup> Pharmacists have considerable influence over the purchase of OTC remedies. Feb 2003. GFK Martin Hamblin (Taken from the Britbus Survey Nov 2002)

<sup>49</sup> Research Project: The Role of the Pharmacy counter Assistant. University of Bristol 2003, pg 2

<sup>50</sup> Research Project: The Role of the Pharmacy counter Assistant. University of Bristol 2003, pg 4

<sup>51</sup> PRISM4, Readers Digest Assoc. 1997. Trust in sources of Medical Information.

- Most customers coming in to pharmacy are happy to talk directly to the Pharmacy Assistant about their problem; according to one data set, only 2.5% ask to speak to the pharmacist directly<sup>52</sup>.
  - Most customers (67%) ask for a product directly.
- Just under 30% of people say that they don't trust the advice of a pharmacy assistant, and over a third of people who had asked for advice were sometimes unsure whether they were talking to the pharmacist.<sup>53</sup>, so there are opportunities for further education of the customer in understanding the pharmacy.

---

<sup>52</sup> Research Project: The Role of the Pharmacy Counter Assistant. University of Bristol 2003, pg 4

<sup>53</sup> Pharmacy Make-Over. Health Which October 2003 Pgs 10-13