



CONSUMER NAVIGATION AND SELECTION BEHAVIORS FOR OTC PRODUCTS IN A RETAIL SETTING

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Consumer Navigation and Selection Behaviors for OTC Products in a Retail Setting

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ABSTRACT

Consumers purchase over-the-counter (OTC) products on a regular basis. In the OTC environment, there are often a number of products within a brand family. The purpose of this study was to understand how consumers navigate through the retail space to locate and select OTC products. An online survey was conducted with 204 consumers to learn more about how they navigate and select OTC products. Consumers navigate by using store signage when they enter the retail setting and begin to search for OTC products. Once in the OTC area, 89% find the aisle relating to the product category (therapeutic area). To find the shelf (the product indication), 76% of consumers use a combination of the brand name (56%) and trade dress (20%), meaning colors, graphics and logos. When asked if the brand name facilitates finding the product they need at the shelf, 87% of consumers state that it does. Consumers make selection decisions based on a combination of factors including their symptoms, the brand name and the price (38%, 27% and 23% respectively).

INTRODUCTION

Consumers are faced with the ongoing challenge of finding their way through a wide variety of retail environments to locate the products that they need. Over-the-counter (OTC) medicines are among the products that consumers use on a regular basis; however, there is very little research about the way in which consumers navigate a retail setting to ultimately find and select the OTC medicines that they need.

Our hypothesis was that the OTC brand name assists the consumer in a significant way to find what they need and to purchase what they know and trust. The Consumer Healthcare Products Association (CHPA) shares this view and believes that “brands play a key role in assisting consumer purchasing decisions by identifying the source of different products as known and trusted, or what economists refer to as search efficiency...[and] the brand name of a medicine or supplement is an initial step of consumer recognition and selection.¹”

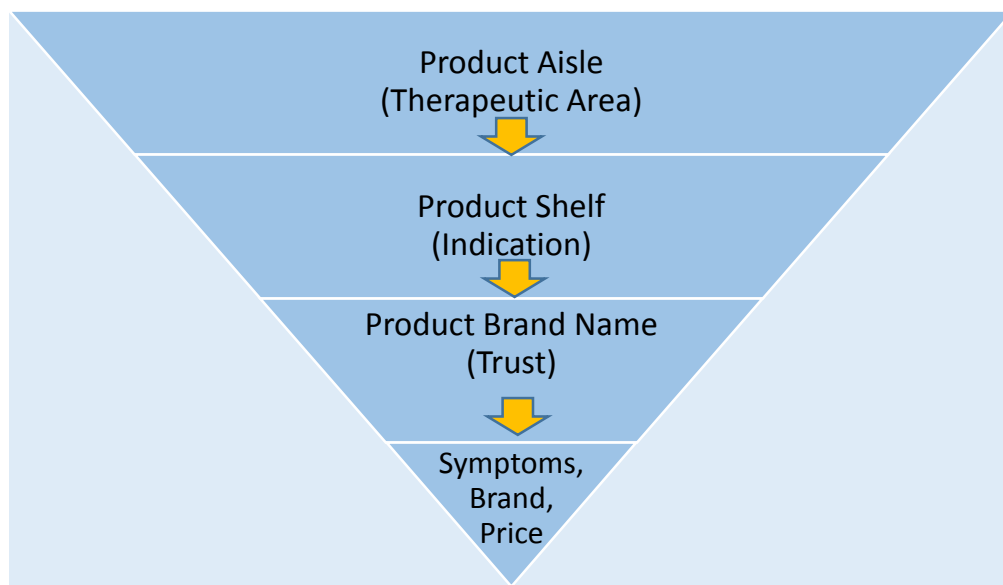
A theoretical model for the consumer’s navigation and decision-making has been developed by Concentrics Research, based on input from consumers ([Figure 1](#)). In the course of interviews and interactions over many years, consumers have described their approaches to locating OTCs in a retail setting.² The “Model for Consumer In-Store Navigation and Decision-Making for OTC Drugs” process is based on the premise that consumers use visual cues (e.g. signage, brand name) to assist them in finding the OTC medicines they are seeking. Consumers find the OTC

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medication area and then navigate to the aisles (therapeutic area), then to the shelf (indications), then to the medication (brand they know and trust) and finally to the product characteristics that address their need(s) (symptoms, brand, price). This process has a natural targeting effect of assisting the consumer in getting to the right area and then to the right product.

The focus of this research was to gather data about the consumer's journey from the time they enter the retail setting to the purchase of the OTC product. We then evaluated which factors were the most important in their navigation and purchase decisions for OTCs.

FIGURE 1: MODEL FOR CONSUMER IN-STORE NAVIGATION AND DECISION-MAKING FOR OTC DRUGS



METHODOLOGY

A sample of adult consumers throughout the U.S. were invited to participate in an online survey about healthcare products. Inclusion and exclusion criteria were applied in the online screener and if these criteria were met, the participant was invited into the survey. Qualified participants (n=204) read and electronically signed a Confidentiality/Nondisclosure (CDA) agreement and then participated in the survey.

Inclusion Criteria

- 18 years of age and older, male or female and of any race or origin.
- Purchased any OTC medicines in the past 12 months.
- Primary purchaser of OTC medications in the household.

Exclusion Criteria

- Participated in any research about a healthcare product in the past 30 days
- Participant or anyone in their household was employed in a marketing, market research, advertising company or worked for a pharmacy, pharmaceutical, managed care or insurance company or in a healthcare practice or for HHS or FDA.
- Participant has ever been trained or worked as a healthcare professional.

Most questions were comprised of multiple choice options with open-end follow-up questions. All questions gave an “other” option, if none of the multiple choice options applied. Survey questions were rotated to avoid a response or ordering bias to the data. The survey questions were organized into the following sections for analysis:

- **Baseline OTC purchase behavior (Q.1, Q.2)**
 - OTCs most frequently purchased and reasons for going to the store for OTCs
- **Navigation behaviors (Q. 3, Q.4, Q.5, Q.6)**
 - Navigation once inside the store (to the OTC area, to the product category, to the shelf and to the medication).
- **Effect of the Brand on navigation and purchase decisions (Q.7, Q.10, Q.13, Q.16)**
 - Brand effect on re-purchase decisions
 - Whether the brand assists in finding the OTC that is needed
 - Brand effect for a new product within a brand family
- **Demographics (Screener Q.A, Q.B, Q.C, Q.D, Q.19; Survey Q.20, Q.21, Q.22)**
 - Age, gender, race, origin, education, and income
 - Frequency and type of OTC purchases

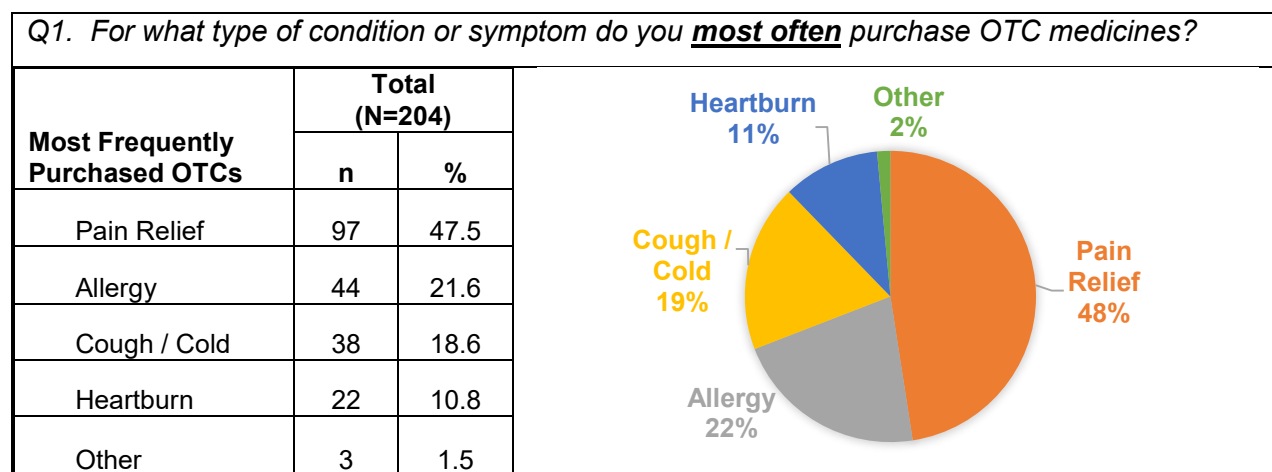
RESULTS

BASELINE OTC PURCHASE BEHAVIORS (Q.1, Q.2)

Key Point #1: Consumers *most frequently* purchase medications for pain, allergy and cough/cold symptoms.

Consumers were asked which OTC medications that they purchase most frequently. Medications for pain relief (48%; 97 of 204), allergy (22%; 44 of 204), cough and cold (19%; 38 of 204), and heartburn medications (11%; 22 of 204) were mentioned as the *most frequently* purchased OTCs ([Figure 2](#)).

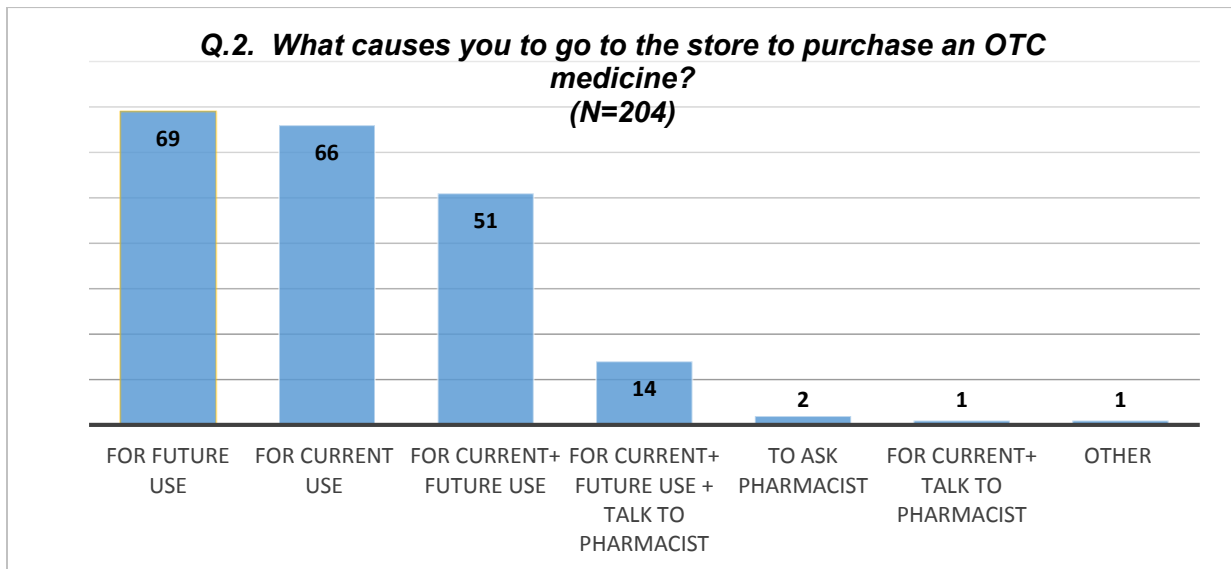
Figure 2: Most Frequently Purchased OTCs



Key Point #2: Consumers go to a retail setting primarily to either buy an OTC for future use or current use.

Consumers reported 3 main reasons for going to a retail setting to purchase OTC medicines ([Figure 3](#)). Roughly a third of participants (34%; 69 of 204) purchase their OTCs proactively for future use, while about a third (32%; 66 of 204) purchase their OTCs for current use. About a quarter (25%; 51 of 204) of participants purchase OTCs for both future and current use.

Figure 3: Reason for going to the store for an OTC medicine

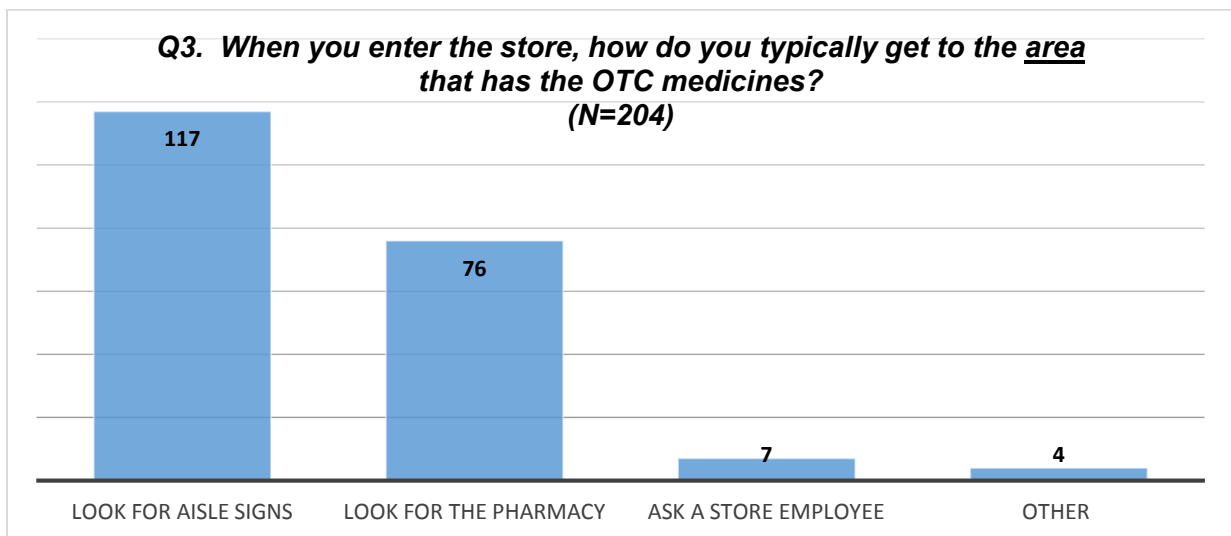


NAVIGATION BEHAVIORS (Q.3, Q.4, Q.5, Q.6)

Key Point #3: When entering a retail setting, consumers navigate to the [OTC area](#) by looking for the pharmacy and aisle signs.

Since every retail setting is different in size, scope and layout, consumers depend on signage to guide them to the OTCs they are seeking ([Figure 4](#)). The majority of consumers look for aisle signs (57%; 117 of 204) and the pharmacy (37%; 76 of 204).

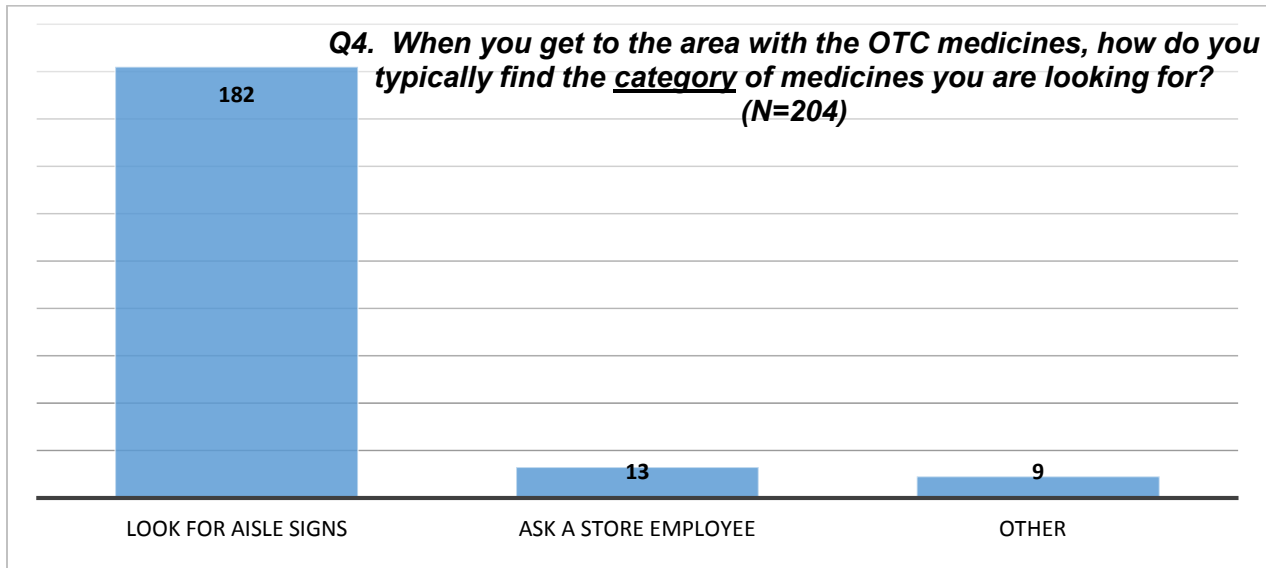
Figure 4: How Consumers Find the OTC Area of the Store



Key Point #4: Once in the OTC area of the store, consumers primarily find the OTC medication category by using aisle signs.

Once consumers find the area of the store that has the OTC medicines, they use aisle signs (89%; 182 of 204) to find the category (therapeutic area) of OTC products that they need (Figure 5).

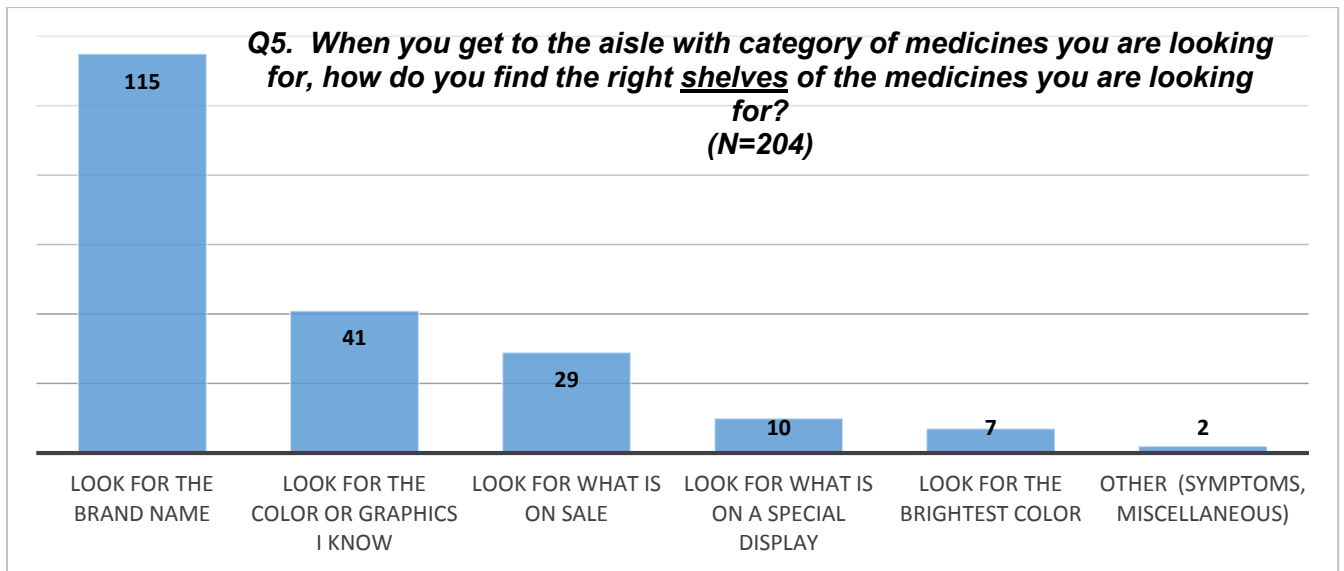
Figure 5: How Consumers Find the OTC Category (Therapeutic Area)



Key Point #5: After consumers find the OTC medication category they are interested in, they find the appropriate shelf by looking for the brand name.

Once consumers find the aisles (therapeutic category) that have the OTC medicine(s) for which they are looking, they were asked about how they locate shelves (indication) containing the medicines they need (Figure 6). The majority of consumers (56%; 115 of 204) look for the brand name they know and trust. Following the brand name, consumers look for the graphics (20%; 41 of 204). Price plays a lesser role in selections that are made (14%; 29 of 204).

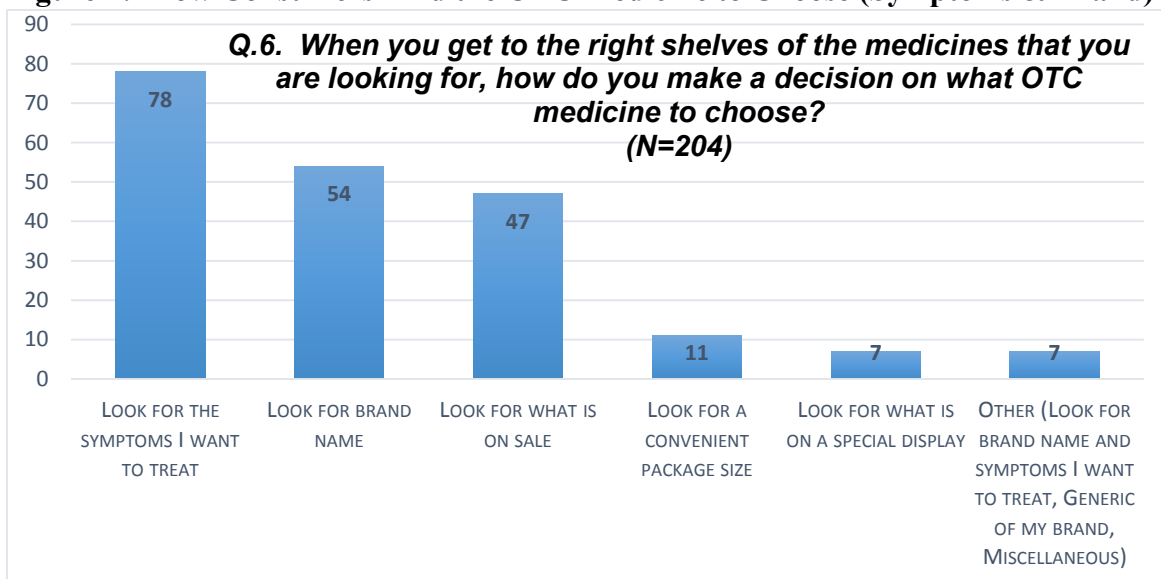
Figure 6: How Consumers Find the OTC Shelf (Indication)



Key Point #6: After consumers find the appropriate shelf, they primarily look for the symptoms they want to treat, the brand and the price.

Consumers primarily look for the symptoms they need to treat (38%; 78 of 204), along with the brand name (27%; 54 of 204). Pricing plays a lesser role in terms of selections that are made (23%; 47 of 204) (Figure 7).

Figure 7: How Consumers Find the OTC Medicine to Choose (Symptoms & Brand)



EFFECT OF THE BRAND ON NAVIGATION AND PURCHASE DECISIONS (Q.7, Q.10, Q.13, Q.16, Q.23)

Key Point #7: Consumers continue to use the same OTC brands because of their effectiveness.

Over three-quarters of consumers (78%; 160 of 204) stated they typically use the same brands repeatedly ([Table 1](#)). Consumers become brand loyal most often because of the demonstrated effectiveness of the product based on previous use. The effectiveness and repeated use leads to trust about the quality, safety and dependability of the drug. Of the top 4 reasons for buying a brand repeatedly, it is interesting to note that 77% (123 of 160) were related to the attributes not associated with cost (e.g. effectiveness, quality, safety, etc.). Only 10% (13 of 160) of those that use the same brands repeatedly stated that their decision was due to cost.

Table 1: Consumers Who Use Brands Repeatedly and Why

Q.7 – Q.8. Do you usually use the same brands over and over? Why?		
	Total (N=204)	
	n	%
Yes (top 4 responses)	160	78.4
Works/Is Effective	104	
Cheapest/Store Brand/Generic	13	
Trust/Quality/Safe/Dependable	11	
Familiarity	8	

Consumer comments:

- “We use the same brands, generally, because we have found them to work. I am open to new brands, especially if they are on sale, but generally stick with what I know.”
- “It works well. I trust the product. When I find medicine that does the job well, I tend to stick to the product or ingredients it contains.”
- “I look for brands I trust and know are good quality.”
- “I trust in the quality and effectiveness of the product.”

For consumers who do not repeatedly buy the same brands, the primary reasons were the price, being open to trying new things, and considering the symptoms they want to treat ([Table 2](#)).

Table 2: Consumers Who Do Not Use Brands Repeatedly and Why Not

Q7 – Q.9: Do you usually use the same brands over and over? Why Not?		
	Total (N=204)	
	n	%
No (top 4 responses)	44	21.6
Price/Sale	18	
Try new things/to see if it will work better	10	
Depends on symptoms/conditions	4	
Loses effectiveness over time	3	

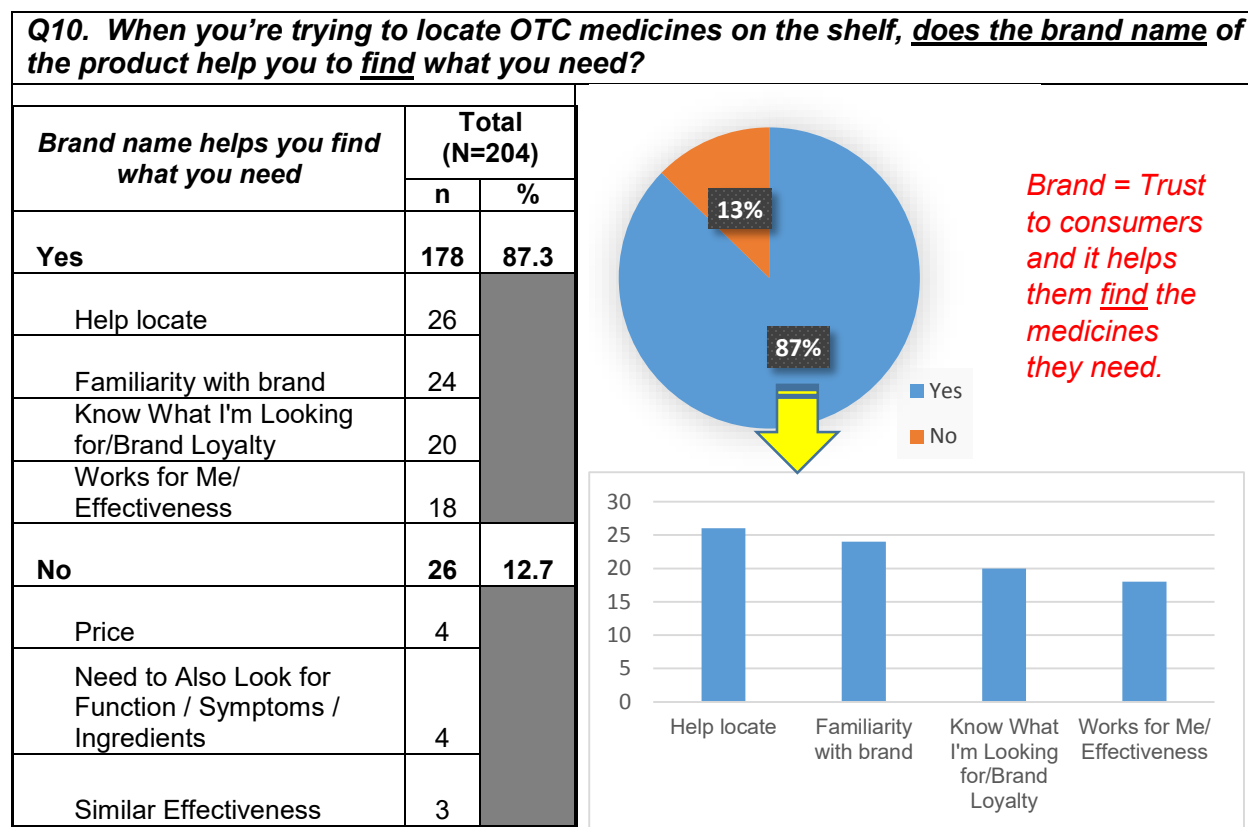
Consumer comments:

- *“Depends on what is available for the right price.”*
- *“Sometimes I like to try new brands to see if they are more effective.”*
- *“Sometimes after reading the box, I then will choose what I need.”*
- *“May not be on sale.”*

Key Point #8: Nearly all consumers use the brand name of the drug to find the medication they need.

When asked if the brand name of the product helps consumers find the OTC medicines they need, 87% (178 of 204) stated that it did. Consumers are familiar with the look of the brands that they use ([Figure 8](#)). Consumers tend to be loyal to their brands and select brands that are effective for them.

Figure 8: Effect of Brand Name in Helping Consumers Find Their OTC Medicines



Consumer comments: (Yes, the brand name helps me find what I need)

- “It helps me locate what I want.”
- “Because my pharmacist stacks them by name and it’s easier to find.”
- “Because I can recognize the package or bottle from prior use.”
- “It is more recognizable with you see the brand name.”

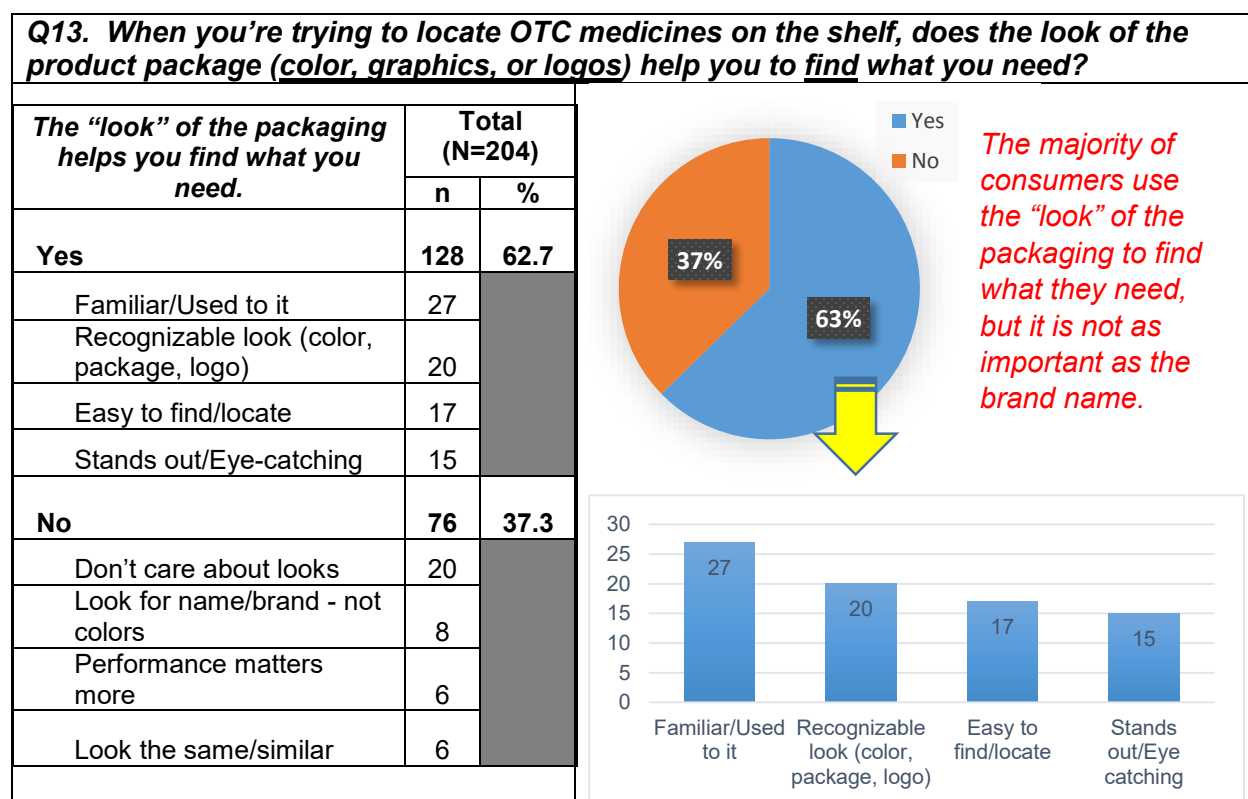
Consumer comments: (No, the brand name does not help me find what I need)

- “I scout around to get the best deal.”
- “The store brand is just as good.”
- “I’m satisfied with what I’m using.”
- “Don’t like them.”

Key Point #9: The majority of consumers use the package graphics (colors, graphics, and logos) to find the medication they need.

Most consumers use the trade dress (colors, graphics and logos) to help them find the OTC medicines they need (63%; 128 of 204). They are familiar with the look of the brands they use, and identify the brand as recognizable and eye-catching. The trade dress helps them to find their product more easily ([Figure 9](#)).

Figure 9: Effect of Package Graphics in Helping Consumers Find Their OTC



Consumer comments: (Yes, the graphics help me find what I need)

- "Familiarity with the product; easily identifiable."
- "I am familiar with the colors and design...so the colors ...help to draw my eye..."
- "Certain brand name products use the same colors in all of their packaging."
- "It looks familiar, reassuring."

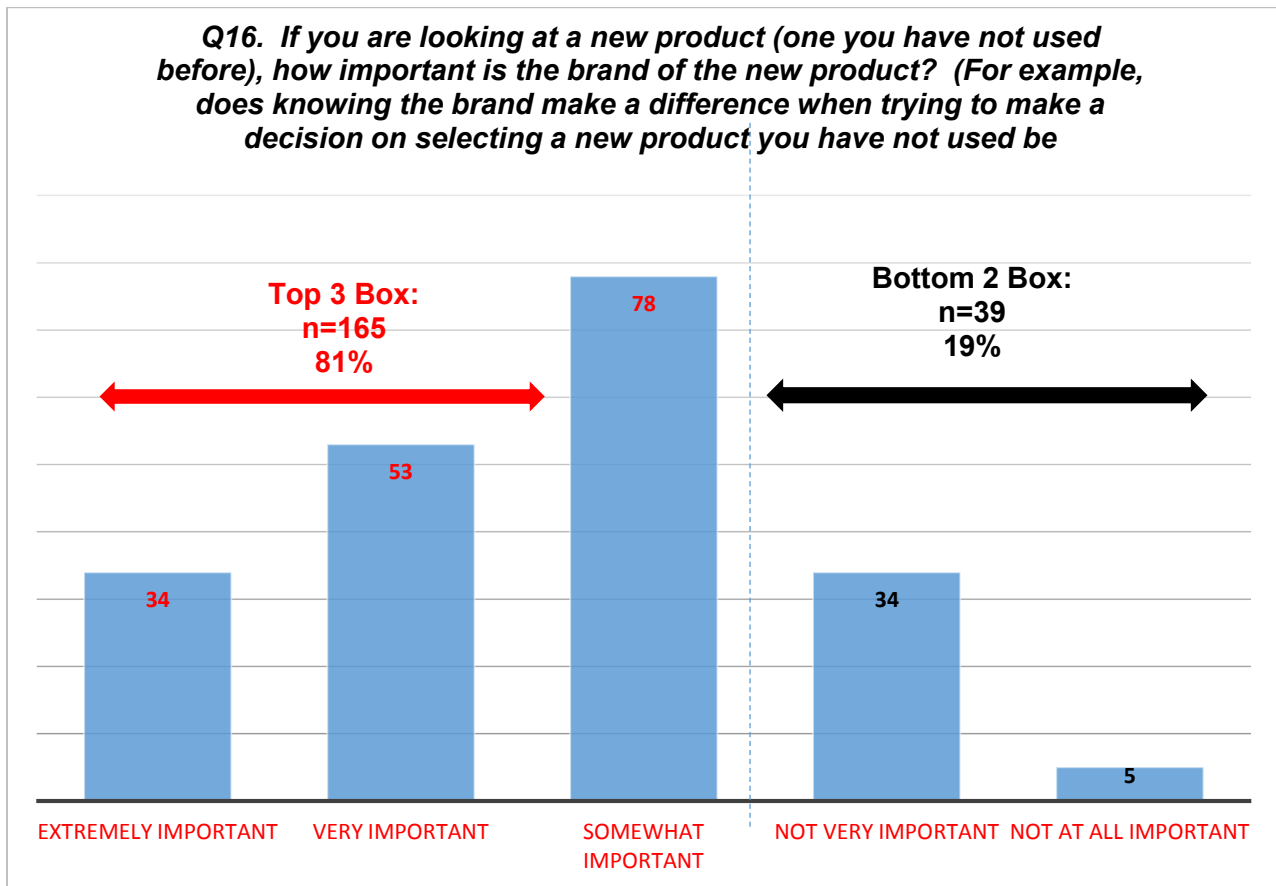
Consumer comments: (No, the graphics do not help me find what I need)

- "Don't care about looks."
- "It doesn't matter what the package looks like."
- "I don't pay attention to the picture but I read the labels."
- "If it does a good job then it doesn't need to look good."

Key Point #10: Most consumers believe the brand name is extremely, very or somewhat important in helping them select a product they *have not used before*.

When asked if the brand name was important in helping consumers select a *new product* that they had not used before, 81% (165 of 204) stated it was extremely, very or somewhat important (Figure 10).

Figure 10: Effect of Brand Name on a New Product Purchase



Consumer comments: (Yes, the brand name is important for a new product I’m trying)

- “Trusted name brands work well.”
- “Reputation for safety and effectiveness.”
- “Dependable.”
- “Because I wouldn’t use a brand I didn’t trust.”

Consumer comments: (No, the brand name is not important for a new product I’m trying)

- “The effectiveness matters most.”
- “I would try a new product once.”
- “I may or may not buy it.”
- “I go on price.”

DISCUSSION

This study supported the hypothesis that consumers navigate in a retail setting first by signage (OTC area, aisle/therapeutic area) and then by brand (shelf/indication, medication) and finally by product characteristics (symptoms treated, brand, price). From a navigation perspective, the brand plays a significant role in guiding consumers to familiar products by using visual cues (graphics, colors, logos) and brand names which are known and trusted. The brand name (87%) and trade dress (63%) play important roles in guiding consumers to the right location and helping them make a selection decision.

Consumers come to trust a brand based primarily on effectiveness. They tell us “it works” and because they can depend on it, they trust it and continue to use it (78%). This is consistent with the 2013 Nielsen survey which shows that OTC drugs are in the top 5 categories (only behind coffee, milk, etc.) for brand loyalty.³ Brand familiarity and confidence have also been defined with dimensions such as confidence, reliability and accessibility.⁴ Even when making a product selection decision for the first time with a new product in a brand family, consumers still use the brand name as a guidepost, believing it is important (81%) in helping them make a decision.

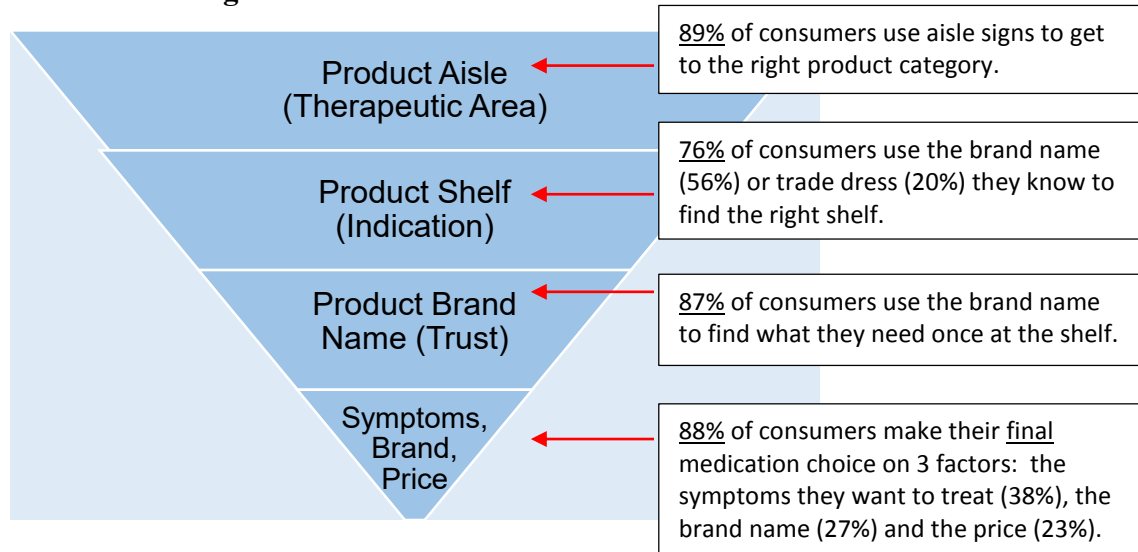
Regulators have stated that they are concerned that the use of a brand name or a brand root name will contribute to consumer confusion and lead to serious safety risks for OTC medicines. Due to this concern, they are proposing that unique product names be used that are not associated with a specific brand name. The data suggest that this approach would lead to *more* confusion since consumers would lose a primary means for navigating to medicines they need and selecting the brands they trust. The brand is a “trust mark”⁵ that infers quality and reliability to consumers. It also accelerates the process of finding the product and provides a mental shortcut to streamline the process and avoid being paralyzed by the number of available options.⁶ Since consumers navigate based on in-store signage and visual cues such as the brand name and graphics,⁷ it is likely that consumers will become more confused without these familiar reference points.

When considering special populations such as the older adults (50+), those of lower education, or those of Hispanic origin, who may have language challenges, the brand is of great importance in providing visual cues to the products they know and trust. Consider the following variations in these populations:

- Older adults, ages 50+ vs. younger adults < age 50:
 - Use the brand to guide them to the right shelf (66% vs. 47%).
- Hispanic Origin vs. Non-Hispanic Origin:
 - Use the brand to guide them to the right shelf (65% vs. 55%).
 - Use the trade dress to guide them (74% vs. 61%).
 - When considering a new product for the first time, they are more likely to use the brand to guide them (91% vs. 80%).
- ≤ High school education vs. ≥ college education
 - Are more likely to look for the brand name to guide them to the right retail shelves (64% vs. 56%).

When we add the study results to the “Model for Consumer In-Store Navigation and Decision-Making for OTC Products”, the model is supported ([Figure 12](#)):

Figure 12: Post-Study Assessment of the Model for Consumer In-Store Navigation and Decision-Making for OTC Products



CONCLUSIONS

Consumers use both the trusted brand name and the familiar trade dress to navigate to the OTC product(s) they need. Selection decisions are driven from a combination of factors, which primarily include the brand, the symptoms they are treating, and the price. The brand name and trade dress provide significant guideposts to a wide range of consumers, including those of different ages, gender, origin and education, in their navigation and selection decisions for OTC products.

While more quantitative research is warranted to explore further populations and behaviors, this pilot study provided a macro view of how consumers depend on the brand name and trade dress to guide them in locating and selecting the OTC medicines that they need.

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APPENDIX 1: DEMOGRAPHICS

Total Responding:	Total (N=204)	
	n	%
Gender		
Male	85	41.7
Female	119	58.3
Age		
18 to 29	20	9.8
30 to 39	48	23.5
40 to 49	35	17.2
50 to 59	55	27.0
60 to 69	41	20.1
70 or older	5	2.5
Race		
Caucasian/White	171	83.8
African American/Black	19	9.3
Asian / Pacific-Islander	8	3.9
Native American	2	1.0
Other	4	2.0
Hispanic Origin		
Yes	23	11.3
No	181	88.7
Education		
Less than High School	2	1.0
Completed High School	43	21.1
Some College/Technical School	57	27.9
Graduated College/Technical School	71	34.8
Graduate Degree/PhD or more	31	15.2
Income		
\$0 to \$14,999	26	12.7
\$15,000 to \$24,999	16	7.8
\$25,000 to \$34,999	29	14.2
\$35,000 to \$44,999	30	14.7
\$45,000 to \$64,999	37	18.1
\$65,000 to \$74,999	13	6.4
\$75,000 or more	53	26.0
How Often Purchase OTC Medicines		
At least 4 times per month	13	6.4
2 – 3 times per month	27	13.2
Once per month	53	26.0
Once every 2 – 3 months	73	35.8
Once every 4 – 6 months	30	14.7
Once per year	7	3.4
Less than once per year	1	0.5

Total Responding:	Total (N=204)	
	n	%
<i>OTC Medicines Purchased for Household (multiple responses accepted)</i>		
Allergy	112	54.9
Antacid	86	42.2
Anti-Itch cream	50	24.5
Anti-diarrhea	38	18.6
Asthma	7	3.4
Athlete's foot products	21	10.3
Cold	133	65.2
Constipation relief	40	19.6
Cough	114	55.9
Diaper cream	9	4.4
Energy / alertness aids	11	5.4
Eye drops	76	37.3
First aid cream	57	27.9
Flu	48	23.5
Gas relief	32	15.7
Heartburn relief	80	39.2
Lactose intolerance	4	2.0
Motion sickness / anti-nausea	10	4.9
Mouth rinses	86	42.2
Nasal / saline spray	42	20.6
Nicotine gum/patches	7	3.4
Pain reliever or fever reducer	145	71.1
Probiotics	22	10.8
Sinus medicine	59	28.9
Sleep aids / sleep medicine	42	20.6
Toothpaste	145	71.1
Other	3	1.5

Columns may not sum to 100% due to rounding.

APPENDIX 2: SUMMARY RESULTS BY QUESTION

Total Responding:	Total (N=204)	
	n	%
Q1. For what type of condition or symptom do you most often purchase OTC medicines?		
Allergy	44	21.6
Cough / Cold	38	18.6
Heartburn	22	10.8
Pain Relief	97	47.5
Other (<i>Allergy, heartburn & pain</i>)	3	1.5
Q2. What causes you to go to the store to purchase an over-the-counter (OTC) medicine for ...		
To get an OTC medicine I may need later (buying it for future use)	69	33.8
To get an OTC medicine I need now	66	32.4
To ask questions of the pharmacist about an OTC medicine	2	1.0
Other (<i>Miscellaneous</i>)	1	0.5
To get an OTC medicine I may need later AND To get an OTC medicine I need now	51	25.0
To get an OTC medicine I may need later AND To get an OTC medicine I need now AND To ask questions of the pharmacist about an OTC medicine	14	6.9
To get an OTC medicine I need now AND To ask questions of the pharmacist about an OTC medicine	1	0.5
Q3. When you enter the store, how do you typically get to the area that has the OTC medicines?		
Look for the pharmacy	76	37.3
Look for aisle signs	117	57.4
Ask a store employee	7	3.4
Other (<i>Already know where to go, Miscellaneous</i>)	4	2.0
Q4. When you get to the area with the OTC medicines, how do you typically find the category of medicines you are looking for?		
Look for aisle signs	182	89.2
Ask a store employee	13	6.4
Other (<i>Browse aisles, Browse shelves, Browse aisles and shelves, Already know where to go, Product packaging</i>)	9	4.4
Q5. When you get to the aisle with category of medicines you are looking for, how do you find the right shelves of the medicines you are looking for?		
Look for the brightest color	7	3.4
Look for the color or graphics I know	41	20.1
Look for what is on a special display	10	4.9
Look for what is on sale	29	14.2
Look for the brand name	115	56.4
Other (<i>Symptoms, Miscellaneous</i>)	2	1.0
Q6. When you get to the right shelves of the medicines that you are looking for, how do you make a decision on what OTC medicine to choose ?		
Look for the symptoms I want to treat	78	38.2

Total Responding:	Total (N=204)	
	n	%
Look for brand name	54	26.5
Look for a convenient package size	11	5.4
Look for what is on a special display	7	3.4
Look for what is on sale	47	23.0
Other (<i>Look for brand name and symptoms I want to treat, Generic of my brand, Miscellaneous</i>)	7	3.4
Q7. Do you usually use the same brands over and over?		
Yes	160	78.4
No	44	21.6
Q10. When you're trying to locate OTC medicines on the shelf, does the brand name of the product help you to find what you need?		
Yes	178	87.3
No	26	12.7
Q13. When you're trying to locate OTC medicines on the shelf, does the look of the product package (color, graphics, and logos) help you to find what you need?		
Yes	128	62.7
No	76	37.3
Q16. If you are looking at a new product (one you have not used before), how important is the brand of the new product? (For example, does knowing the brand make a difference when trying to make a decision on selecting a new product you have not used before?)		
<i>Top-3 Box</i>	<i>165</i>	<i>80.9</i>
Extremely important	34	16.7
Very important	53	26.0
Somewhat important	78	38.2
<i>Bottom-2 Box</i>	<i>39</i>	<i>19.1</i>
Not very important	34	16.7
Not at all important	5	2.5

APPENDIX 3: SURVEY

**QUESTIONNAIRE
CONSUMER BUYING AND NAVIGATION BEHAVIORS
FOR OTC MEDICINES**

All programming notes are presented in **BOLD CAPS** throughout the document. These are instructions only and will not be visible to respondents in the survey.

Closed End Questions	Partial Open End Questions	Open End Questions	Total Approximate Survey Length
Screeners: 15	Screeners: 1	Screeners: 0	(Screeners + Survey)
Survey: 6	Survey: 7	Survey: 4	5-10 min

The following are the sections of the survey and items included in this document:

- Introduction
- Screener Profile
- Confidentiality Agreement
- Survey
- Demographics

Introduction

Thank you for your interest in participating in our research survey. Your time and opinions are greatly valued, as your responses will help us better understand the perspectives of consumers such as yourself.

Please be assured that your individual answers will be kept strictly confidential. This survey will take approximately 5-10 minutes to complete.

Screener Profile

We would like to begin by confirming a few questions about you.

A) Which of the following best represents your age?

ALLOW ONE RESPONSE.

Less than 18	1
18-29	2
30-39	3
40-49	4
50-59	5
60-69	6
70+	7

B) What is your gender?

ALLOW ONE RESPONSE.

Male	1
Female	2

C) Which of the following best represents your race?

ALLOW ONE RESPONSE.

Caucasian	1
African-American	2
Asian / Pacific-Islander	3
Native American	4
Other (Specify) _____	5

D) Are you of Hispanic origin?

ALLOW ONE RESPONSE.

Yes	1
No	2

19) What is the last year of school you completed?

ALLOW ONE RESPONSE.

Less than High School	1
Completed High School/GED	2
Some College/Technical School	3
Graduated College/Technical School	4
Graduate Degree/PhD or more	5
REFUSED – DO NOT SHOW	6

E) Who is the primary purchaser of medicines without a prescription in your household?

ALLOW ONE RESPONSE.

Myself	1
My spouse/partner	2
Joint responsibility between myself and spouse/partner	3
Another family member	4
Other	5

F) Have you participated in any research on any healthcare products in the past 30 days?

ALLOW ONE RESPONSE.

Yes	1
No	2

G) Are you, or anyone in your household, currently employed by any of the following?

ALLOW ONE RESPONSE PER ITEM.

		NO	YES	DK
1	A marketing or marketing research company	1	2	3
2	An advertising agency or public relations firm	1	2	3
3	A pharmacy or pharmaceutical company	1	2	3
4	A manufacturer of medicines	1	2	3
5	A managed care or health insurance company	1	2	3
6	A healthcare practice	1	2	3
7	A public health agency such as Health and Human Services or the FDA	1	2	3

H) Have you ever been trained as or worked as: **READ LIST. CIRCLE “NO”, “YES” OR “DK”.**

ALLOW ONE RESPONSE PER ITEM.

	NO	YES	DK
A healthcare professional	1	2	3

I) Have you purchased any Over-the-Counter (OTC) medicines (this means medicines that do not require a prescription) in the past 12 months?

ALLOW ONE RESPONSE.

Yes	1
No	2

IF QA = PUNCHES 2-7, AND QE=PUNCH 1, AND QF = PUNCH 2 (NO), AND QG = PUNCH 1 FOR ALL (NO FOR G1-G7), AND QH = PUNCH 1 (NO), AND QI = PUNCH 1 (YES) - CONTINUE. OTHERWISE, TERMINATE.

SET SOFT QUOTAS FOR DEMOGRAPHICS (AGE, GENDER, RACE, ETHNICITY) TO MATCH CENSUS:

- **Male (49.2%)**
- **Female (50.8%)**

- **Caucasian (77.7%)**
- **African American (13.2%)**
- **Asian (5.3%)**

- **Hispanic origin (17.1%)**

14%	Less than HS
30%	HS Grad/GED
20%	Some College/Tech School
38%	Graduated College/Tech School + Graduate Degree

Thank you. Based on your responses, you qualify for the survey. In order to participate, you will need to read and electronically sign the Confidentiality Agreement.

Confidentiality Agreement

The purpose of this study is to learn about how you locate over-the-counter medicines in a retail setting.

By signing this agreement, you agree not to disclose your participation to anyone unless required by law and to treat what you see confidentially for a period of two (2) years.

Any answers, information, and suggestions you may offer are given without obligation of any kind.

During your participation in this study, you will be asked a minimal amount of information about yourself. Specifically, you may be asked about:

- Information that identifies you personally such as your name and address
- Your medical history
- Your medication history

The information gathered will be sent to the company sponsoring this survey. The information sent will **not** include your name, address, social security number, or other information that directly identifies you. Instead, a code number will be assigned to your study information.

The study information collected will be used for research purposes to support the objectives of the study, to better understand how consumers locate the OTC medicines they are looking for in a retail store.

All of this information will be kept confidential and your information will be linked only to your participant number and not directly to you. If results of this study are published, you will not be identified by name. All information recorded during the course of this

study, except your name and contact information, may be provided to the company sponsoring the study and/or the Food and Drug Administration (FDA).

You will be paid for your participation in this study. There are no costs to you for being in this study. When you have finished all of the study, you will be paid for your time.

It is completely up to you if you wish to take part in this study. You can stop participating in this study at any time.

After reading the above, please select one option below:

- I affirm my understanding of the above and checking this box represents my electronic signature.
- I would not like to participate in this study.

RECONFIRM IF CLICK 'I WOULD NOT LIKE TO PARTICIPATE IN THIS STUDY'. IF STILL YES – TAKE TO CLOSING SCREEN.

Survey

Please take your time and read each question carefully before responding.

- 1) For what type of condition or symptom do you **most often** purchase OTC medicines?

ALLOW ONE RESPONSE.

Allergy	1
Cough / Cold	2
Heartburn	3
Pain Relief	4
Other (specify)_____	5

INSERT CATEGORY BASED ON RESPONSE ABOVE.

- 2) What causes you to go to the store to purchase an over-the-counter (OTC) medicine for [INSERT Q1 RESPONSE]?

ALLOW MULTIPLE RESPONSES.

To get an OTC medicine I may need later (buying it for future use)	1
To get an OTC medicine I need now	2
To ask questions of the pharmacist about an OTC medicine	3
Other (specify)_____	4

Now, we want to understand how you locate the OTC medicine you want or need when you are in a store. Think about what you do when you go to a store to get an OTC medicine. Try to describe, step by step how to find the exact OTC medicine you are looking for.

- 3) When you enter the store, how do you typically get to the area that has the OTC medicines? (Choose 1)

ALLOW ONE RESPONSE.

Look for the pharmacy	1
Look for aisle signs	2
Ask a store employee	3
Other (specify)_____	4

- 4) When you get to the area with the OTC medicines, how do you typically **find the category** of medicines you are looking for? For example, how would you find where the cold medicines or allergy medicines are located? (Choose 1)

ALLOW ONE RESPONSE.

Look for aisle signs	1
Ask a store employee	2
Other (specify)_____	3

- 5) When you get to the aisle with category of medicines you are looking for, how do you **find the right shelves** of the medicines you are looking for? (Choose 1)

ROTATE PUNCHES 1-5. ALLOW ONE RESPONSE.

Look for the brightest color	1
Look for the color or graphics I know	2
Look for what is on a special display	3
Look for what is on sale	4
Look for the brand name	5
Other (specify)_____	6

6) When you get to the right shelves of the medicines that you are looking for, how do you make a **decision on what OTC medicine to choose?** (Choose 1)

ROTATE PUNCHES 1-5. ALLOW ONE RESPONSE.

Look for the symptoms I want to treat	1
Look for brand name	2
Look for a convenient package size	3
Look for what is on a special display	5
Look for what is on sale	6
Other (specify) _____	7

7) Do you usually use the same brands over and over?

ALLOW ONE RESPONSE.

Yes	1
No	2

ASK Q8 ONLY IF Q7 = PUNCH 1:

8) Why?

ASK Q9 ONLY IF Q7 = PUNCH 2:

9) Why not?

10) When you're trying to locate OTC medicines on the shelf, does the brand name of the product help you to find what you need?

ALLOW ONE RESPONSE.

Yes	1
No	2

ASK Q11 ONLY IF Q10 = PUNCH 1:

11) Why?

ASK Q12 ONLY IF Q10 = PUNCH 2:

12) Why not?

13) When you're trying to locate OTC medicines on the shelf, does the look of the product package (color, graphics, logos) help you to find what you need?

ALLOW ONE RESPONSE.

Yes	1
No	2

ASK Q14 ONLY IF Q13= PUNCH 1:

14) Why?

ASK Q15 ONLY IF Q13 = PUNCH 2:

15) Why not?

16) If you are looking at a new product (one you have not used before), how important is the brand of the new product? (For example, does knowing the brand make a difference when trying to make a decision on selecting a new product you have not used before?)

ALLOW ONE RESPONSE.

Extremely important	5
Very important	4
Somewhat important	3
Not very important	2
Not at all important	1

17) Why is the brand of the new product [**INSERT Q16 RESPONSE**] to you?

Demographics

Finally, we have just a few last questions for you to help us group your responses with others like yourself.

20) Which of the following best represents your total annual household income?

ALLOW ONE RESPONSE.

\$0 to \$14,999	1
\$15,000 to \$24,999	2
\$25,000 to \$34,999	3
\$35,000 to \$44,999	4
\$45,000 to \$64,999	5
\$65,000 to \$74,999	6
\$75,000 or more	7
REFUSED – DO NOT SHOW	8

21) How often do you typically purchase OTC medicines?

ALLOW ONE RESPONSE.

At least 4 times per month	1
2 – 3 times per month	2
Once per month	3
Once every 2 – 3 months	4
Once every 4 – 6 months	5
Once per year	6
Less than once per year	7

22) Which of the following OTC medicines do you typically purchase for your household?

ALLOW MULTIPLE RESPONSES.

Allergy	1	Diaper cream	10	Mouth rinses	20
Antacid	2	Energy / alertness aids	11	Nasal / saline spray	21
Anti-Itch cream	3	Eye drops	12	Nicotine gum/patches	22
Anti-diarrhea	4	First aid cream	14	Pain reliever or fever reducer	23
Asthma	5	Flu	15	Probiotics	24
Athlete's foot products	6	Gas relief	16	Sinus medicine	25
Cold	7	Heartburn relief	17	Sleep aids / sleep medicine	26
Constipation relief	8	Lactose intolerance	18	Toothpaste	27
Cough	9	Motion sickness / anti-nausea	19	Other (specify)	28

CLOSING: Those are all of our questions. Thank you very much for your time and for sharing your responses with us today.