



Path to Purchase: **Over the Counter**

CONDUCTED BY

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ON BEHALF OF



The Purpose.

Understanding recent developments, showcasing consumer behaviour digital-wise in general and search-wise in particular in the OTC consumer journey. Key to success is the conversion of these insights in order to discover business opportunities for Google and its clients.

THE NARRATIVE:

Buyers Behaviour

We learn how buyers research, where & why. We see where the research starts, continues and where it converts into sales. We learn about moments of pain & excitement



Client Opportunity

Get engaged with clients and mirror consumer behaviour with assets provided by Google. Step into a consultancy role & provide useful insights.

Mirror demands to uncover opportunities





THE NARRATIVE:

Buyers Behaviour



Client Opportunity

BUYING HABITS

How are purchases made?

Identify & leverage (online) opportunities to drive online or offline sales

MOMENTS OF PAIN

What challenges researchers?

Identify ways to help and give guidance

RESEARCH

How do buyers research?

Understand how online can help to connect

VIDEO

Is video a relevant asset for buyers?

Engage with clients about video

VALUE

What is used & what adds value?

Discuss & engage with clients how to maximize value and impact

Mirror demands to uncover opportunities

Who is the target group?



Onlineers **18
years and older**
were invited to
the survey



**2.504
purchasers** of
at least one of
the defined OTC
products



501 bought
cold or flu medications



500 bought
neck or back pain medications



500 bought headache or
migraine medications



502 bought
“Stop-smoking” medications



501 bought vitamins &
supplements



01

Key Facts

Characteristics of OTC purchases

02

Needs & Challenges

Settings for the OTC research

03

First Awareness

Coming across the product

04

Information seeking

Usage and impact of touch points



01

Key Facts

Characteristics of OTC purchases

Characteristics of the OTC purchase.



Planned purchase,
triggered by
pain / need.



Focus on
relief.
Low brand loyalty.



Short buying
decision.
Relieve pain
fast.

What are the **characteristics** of the OTC purchase?

Some key facts – all OTC purchasers





02 Needs & Challenges

Settings for the OTC research

Top 10 **information needs** when searching for symptoms, causes and treatments

OTC purchasers (treatments for cold/flu, neck/back pain or headache/migraine)



Question asked: Q23 – Type of information gathered – What information about your symptoms, causes or treatments did you search for, online or offline? Base: OTC purchasers, cold/flu, neck/back pain, headache/migraine n=1,501 Source: P2P Healthcare / OTC Survey 2017

Top 10 information needs when searching for products

(All OTC purchasers)

27%	Prices
18%	Price comparisons
17%	Suitable products, drugs or treatments
17%	Information about side effects
16%	Product comparisons
14%	Reviews or recommendations
14%	Application or dosage instructions
14%	Online purchase options
8%	Availability
7%	Locations of selling points

Question asked: Q23_1 – Type of information gathered – Products – What information about products and treatments did you search for, online or offline?

Base: all OTC purchasers, n=2,504

Source: P2P Healthcare / OTC Survey 2017

Research may lead to **confusion** & **frustration**

confusion

- 60% I found too much information.
- 52% Information of statements were conflicting.
- 44% I found misleading or incorrect information.

frustration

- 40% I was uncertain after searching for information.
- 32% I could not find any information.

Question asked: Q35.1 – Challenges along the way – How often, if at all, did you have the following experience while looking for information?

Top 3 (very often/ frequently/ occasionally)

Base: all OTC purchasers, n=2,504

Source: P2P Healthcare / OTC Survey 2017



03

First Awareness

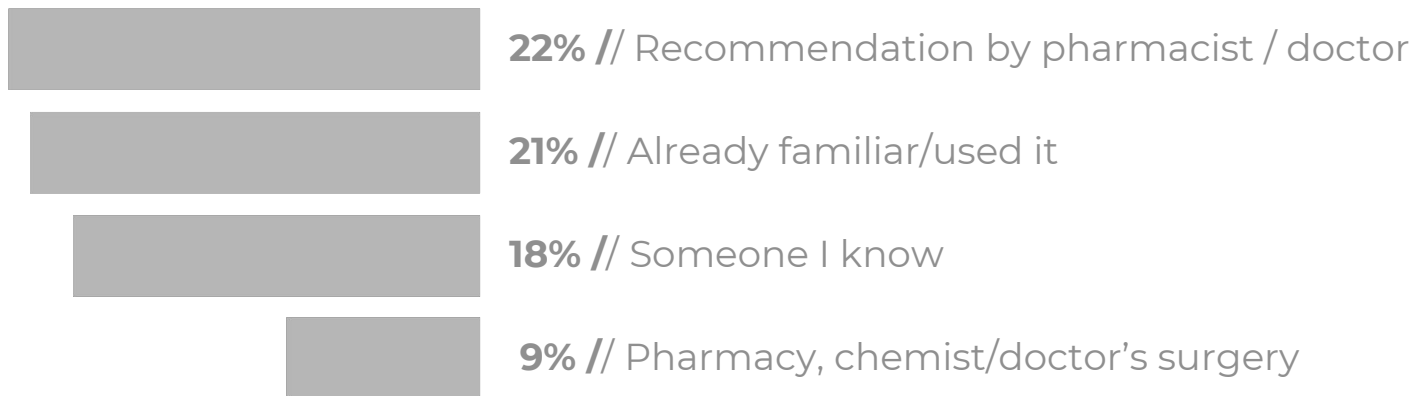
Coming across the product

Product Awareness.

Product awareness is mainly driven by recommendations and prior use. **Online is the most effective media-touchpoint** to raise the customers awareness for OTC products.

Point of first product awareness

All OTC purchasers



Online & Media Channels



Question asked: Q13_1 – Point of first awareness – How did you first become aware of the product or brand you purchased?

Base: all OTC purchasers, n=2,504

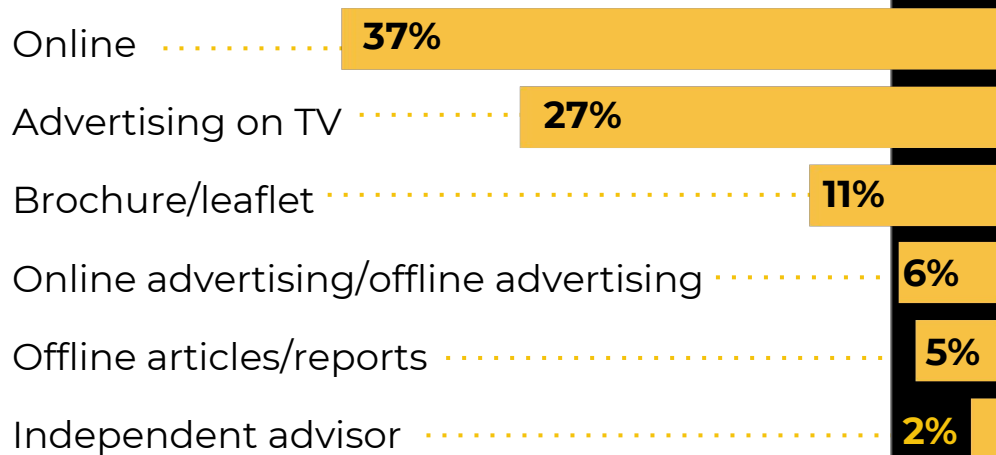
Source: P2P Healthcare / OTC Survey 2017



Point of first product awareness:

Online and media channels

All OTC purchasers



Online and TV advertising are the most important media channels for product awareness



04

Information seeking

Usage and impact of touch points

Multi-channel Journey

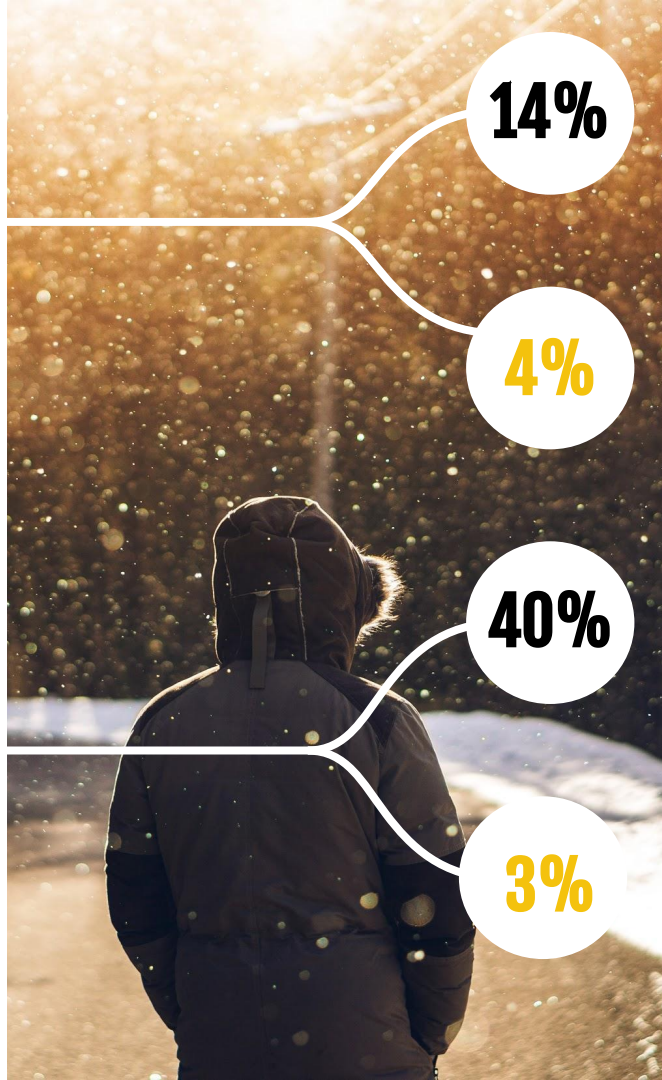
Buyers discover OTC products **offline**, but leverage **online** information sources to conduct research about the product, its alternatives, or its side effects. After research, the final purchase typically occurs **offline**.



22%
Bought
online



78%
Bought
offline



14%

Researched
Online & Offline

4%

Researched
Online Only

40%

Researched
Online & Offline

3%

Researched
Online Only

ROPO
Effect

→ 43%



of customers
Research OTC
Products
Online,
Before
purchasing
them **O**ffline.

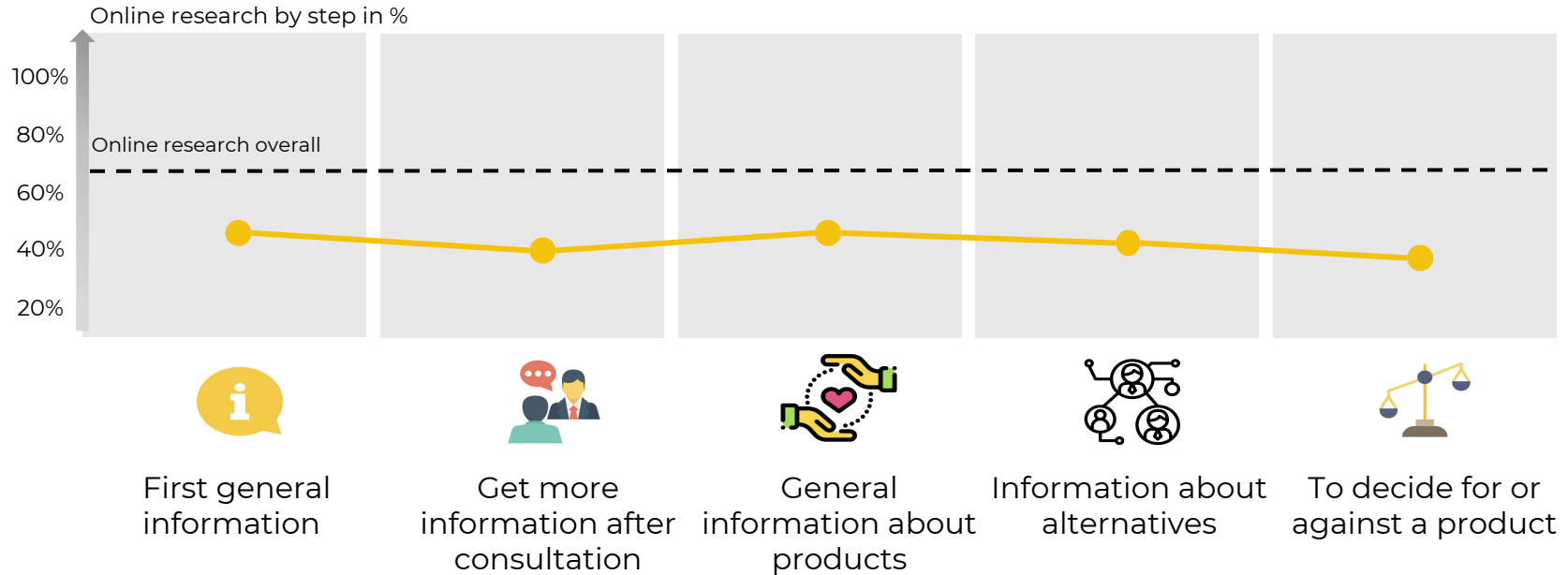
Online research is
essential to prepare
online and offline
purchases.



61% of buyers research online

Online research is essential in researching OTC at every stage of the consumer journey.

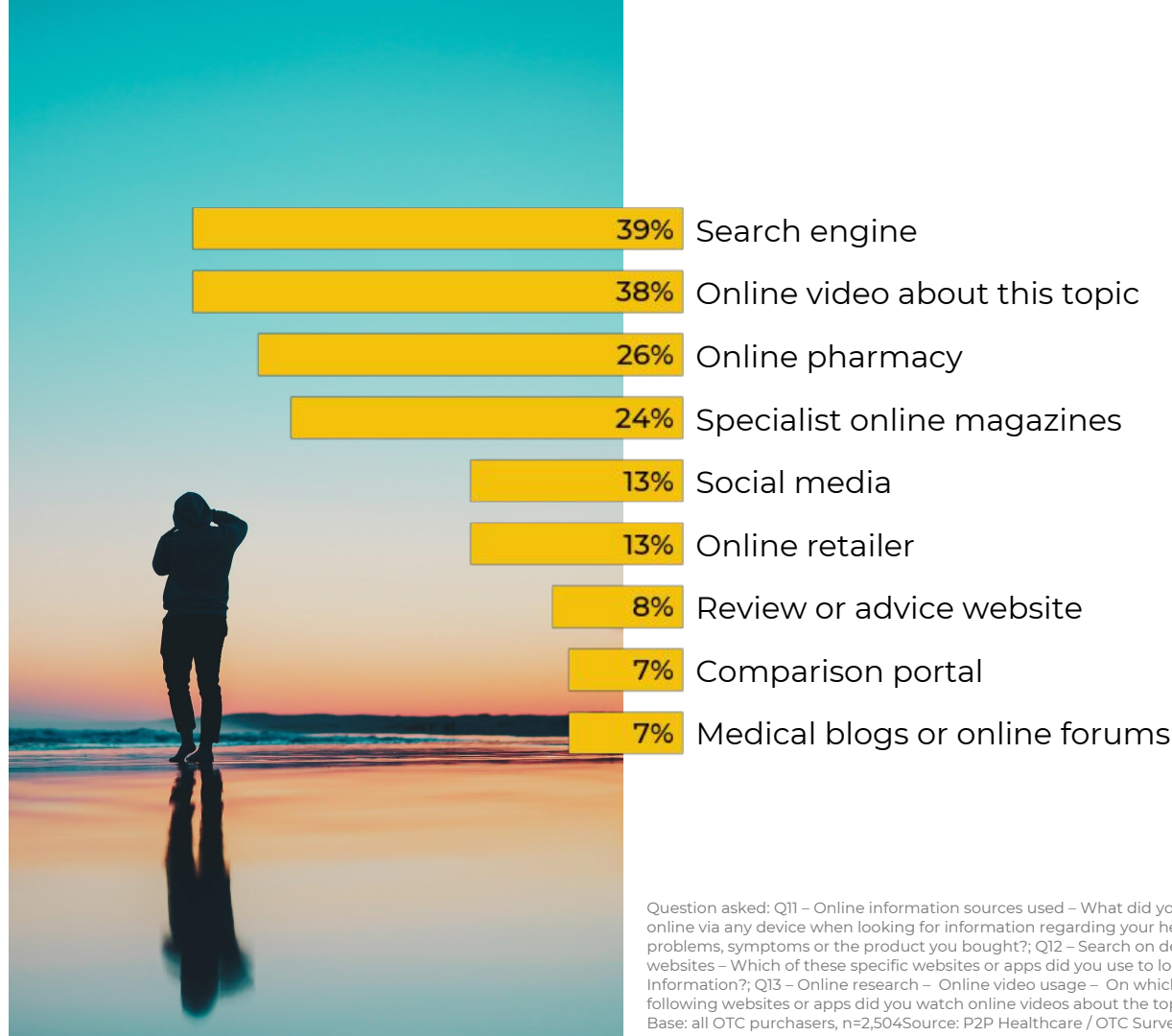
All OTC purchasers



Question asked: Q11 – Online information sources used – What did you do online via any device (PC, laptop, tablet, smartphone) when looking for information regarding your health problems, symptoms or the product you bought?;
Q12 – Search on dedicated websites – Which of these specific websites or apps did you use to look for information?;
Q13 – Online research – Online video usage – On which of the following websites or apps did you watch online videos about the topic?; Q28–31 – Usage of touchpoints at particular moments – What did you do during this step?; Base: all OTC purchasers, n=2,504;
Source: P2P Healthcare / OTC Survey 2017

Overall, **search** is among the **top 10 online touchpoints** people use for research

All OTC purchasers



Question asked: Q11 – Online information sources used – What did you do online via any device when looking for information regarding your health problems, symptoms or the product you bought?; Q12 – Search on dedicated websites – Which of these specific websites or apps did you use to look for information?; Q13 – Online research – Online video usage – On which of the following websites or apps did you watch online videos about the topic?
Base: all OTC purchasers, n=2,504 Source: P2P Healthcare / OTC Survey 2017



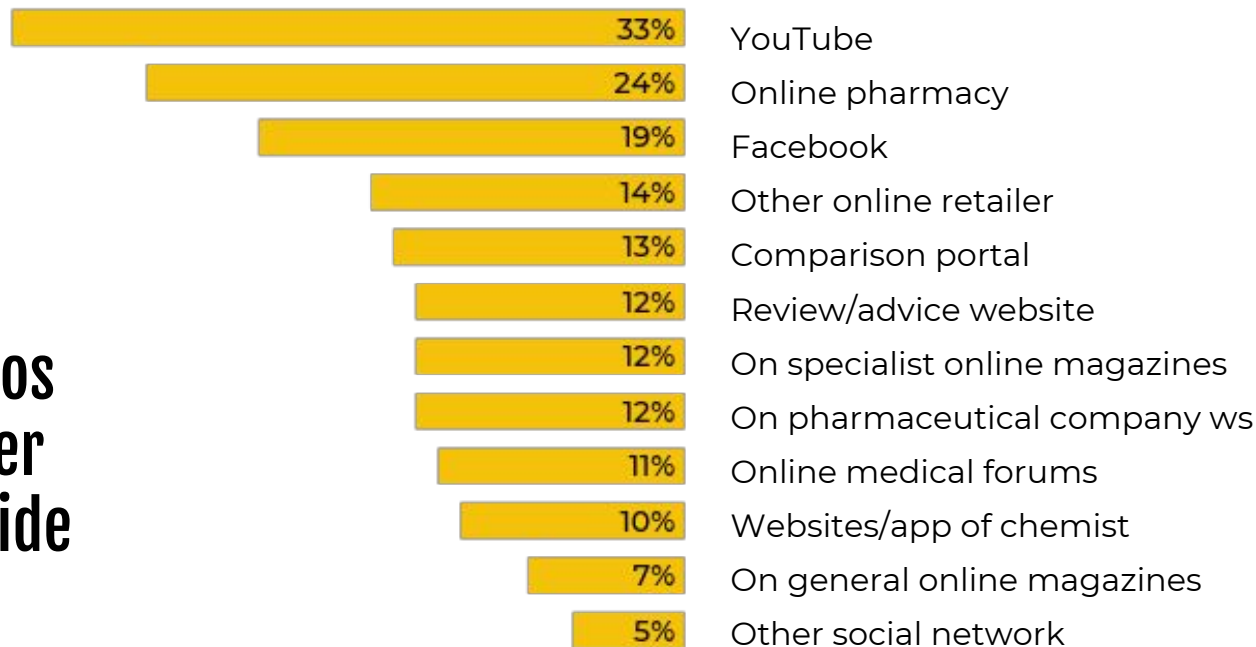
Online Video Usage

YouTube is widely used to watch videos about OTC, but other websites also provide video content: 33%

% of buyers who watched an online video about the topic have done so YT

Online videos are available on different destinations

YouTube is widely used to watch videos about OTC, but other websites also provide video content



Question asked Q13 – Online research – Online video usage – On which of the following websites or apps did you watch online videos about the topic?

Base: all OTC purchasers who research via online video, n=889

Source: P2P Healthcare / OTC Survey 2017

Buyers would want to get guidance on application, dosage and (side) effects

Suited online video content in %

40% Information on the effect and dosage

39% Reviews by users or affected persons

38% Information on side effects, problems and dangers

36% Application of the product/drug

25% Comparisons with other products in the same category

21% Current trends or research results

19% Product presentation/information from the manufacturer

14% Advertising for brands, medicines or products

Question asked: Q36 – Online video content watched – What type(s) of video content is, from your perspective, suited to informing people about medical treatments, medical products or brands?

Base: all OTC purchasers who research via online video, n=889

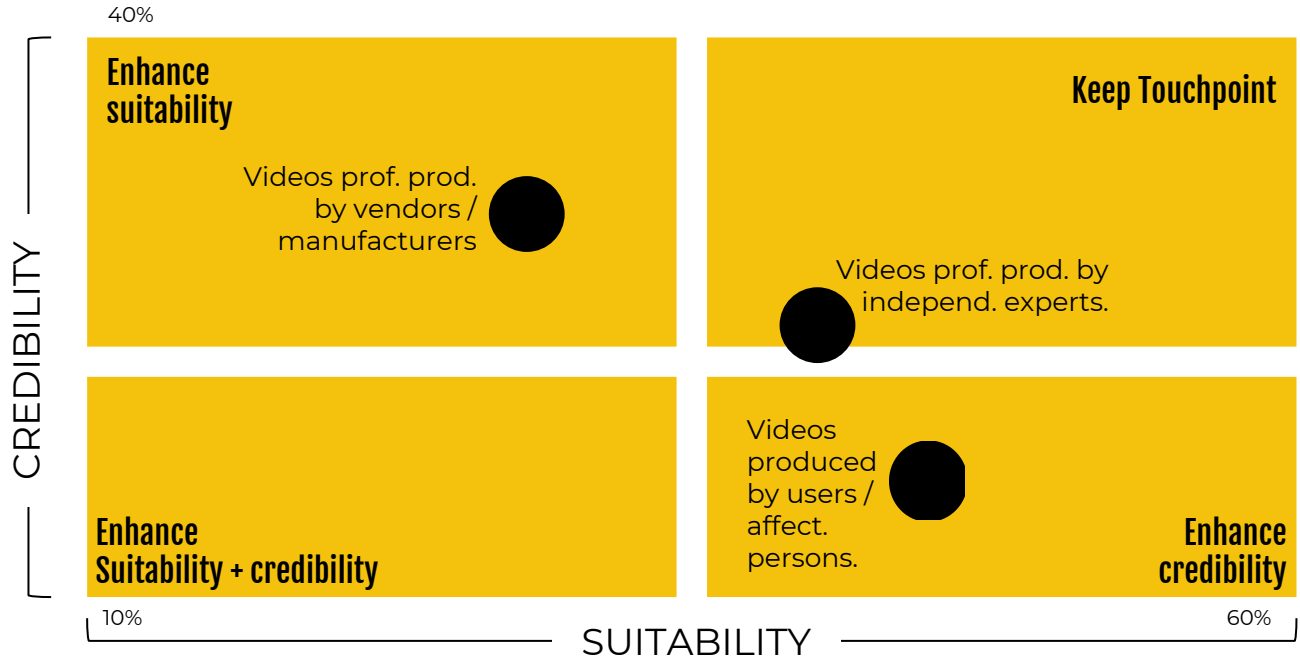
Source: P2P Healthcare / OTC Survey 201

IMPACT matters

The higher the **reach** of a certain touch point – the more impact? Yes, but only if this touch point adds **value**

Gap between suitability and credibility

Although they have high credibility, professional videos by vendors and manufacturers lack suitability while amateur videos are used often but don't offer much credibility



Questions asked Q35 – Most suited online video format– Which online videos are most suited do you think are suited to inform about medical treatments, medical products or brands?
Q33: – Credibility of touchpoints – From your perspective, which of the following talks, information sources, media or online options were credible?
Base: X-axis: All OTC purchasers who research via online video, n=889 Base: Y-axis: All OTC purchasers who watched online videos professionally produced by vendors or manufacturers n=278; online videos professionally produced by independent experts n=405; review videos produced by users or affected persons n=394
Source: P2P Healthcare / OTC Survey 2017



THE NARRATIVE:

Buyers Behaviour



Client Opportunity

Short decision cycle, low loyalty

Buyers decide quickly & are open to try out different products

Continuous brand visibility & presence can yield purchases

MOMENTS OF PAIN

Confusion makes purchase decisions harder

Trustworthy & credible information, consistently provided at different TPs

ONLINE & OFFLINE

Buyers research multi-channel, purchases are offline-centric

Online in general & search in particular matter

VIDEO CAN GROW

YT adds value, videos to understand application & dosage are wanted

Push YT as relevant video destination to add content & comms

VALUE & USAGE YIELD IMPACT

YT is leading video destination on value & reach

Discuss with client what content & brand presence on YT may add value to buyers

Mirror demands to uncover opportunities



**Let ONLINE become a MORE
INTUITIVE & ESSENTIAL PART
of OTC PURCHASES**

The TNS Kantar Google Team

We are 100% dedicated to working with Google. We combine excellent digital industry expertise, we are very familiar with the Google topics & assets. We embrace Google's ways of working and have excellent skills re the Google business tool suite.



Industry Expertise

We cooperate with subject matter experts: industry experts, local research experts, topics experts such as brand consultants, innovation experts or CX or UX

More than P2P

While P2P / ecommerce and shopper research is a major area of expertise, we also offer research around YT, ad effectiveness, digital devices & more

KANTAR

KANTAR TNS is one entity from the KANTAR family, the (digital) information experts within the WPP network. Google is a global client with a GAD model in place to bring the best of KANTAR together. As the Google team@KANTAR we act worldwide cross markets and entities.

We offer dedicated Google research expert hubs in EMEA, APAC, SSA, LATAM & Northern America.

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