

A close-up photograph of a person's hands. The person is wearing a white, intricately patterned lace top. They are holding a black smartphone in their right hand and a white plastic pill bottle in their left hand. The background is blurred, suggesting a pharmacy or healthcare setting.

The Future is in Our Hands: Over-the-counter Healthcare in Canada

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Mobile technology has changed our lives by giving us a persistent connection to answers about anything, with a simple click, swipe or voice command. As a result, Canadians are now taking a very personal, very digital, approach to their own health. New Google–Ipsos Reid research identifies the key micro-moments that over-the-counter brands need to understand to be there for consumers when it matters most.

think with **Google**

When you feel a tickle in your throat or are battling a gnawing headache, you want immediate relief. A new Google study, in partnership with Ipsos Reid, has found that nearly half of all Canadians are more actively monitoring their health versus a year ago¹ and are researching over-the-counter (OTC) health products prior to purchase¹. Half of the Canadians who research OTC health products are researching within a day of purchase¹, usually with the first sign of illness.

1. A personal, digital approach to health

In today's digital environment, Canadians are increasingly taking healthcare into their own hands. Over 17 million Canadians regularly browse online medical resources like WebMD, Healthline and Everyday Health each month.² In fact, we uncovered that before making a purchase of a common OTC product (for example cough & cold, headache medication), Canadians are just as likely to turn to digital sources such as online search and video as traditional sources, such as talking to their doctor or pharmacist (55% access traditional sources vs. 52% digital sources.¹)

Google & Ipsos Reid, OTC Consumer Path to Purchase, Summer 2015. OTC categories included: allergy & inflammation, cough & cold, indigestion & GI remedies, pain management, teeth sensitivity and vitamins & supplements.

Most important **digital sources** include search, brand and review sites¹



2. Mobile phones, our personal advisors

With powerful, always connected devices as our persistent sidekicks, more than one third of OTC health searches are conducted on mobile

devices.⁴ This number is growing fast; there are 19% more OTC searches on mobile today than there were 12 months ago.⁴ Mobile phones are quickly becoming the common resource for health-related information the moment we seek immediate relief.

Some of the most common health-related Google searches by Canadians:⁴

Source: Google internal data, November 2014 - October 2015.

Cough/Cold/Congestion

What are stomach flu symptoms?



Where is the closest place to get a flu shot?
What are the best home remedies for a cold?
Where can I buy Cold FX?

Pain Relief

What is sciatic nerve pain?



Where can I get pain treatment?
What are effective lower back stretches?
Where can I buy Biofreeze?

3. The emergence of video health information

Though search engines, brand websites and online forums remain the most popular sources for online healthcare information, video is growing increasingly significant to consumers. When it comes to OTC, 12% of patients used online video for symptom research and product information before making an OTC purchase.¹

How brands can win the OTC moments that matter

Our research has revealed how the traditional Canadian OTC path to purchase has evolved. Canadians are taking a more hands-on approach with

their health, relying on their smartphones during the path to purchase, and increasingly turning to video as a source of OTC health information.

Be Present: We know that two thirds of consumers enter a store already primed with a brand in mind.¹ Being present when Canadians are searching for your brand or when they are asking common category questions is key.

Build Awareness: With three quarters of Canadians currently consuming online video, consider incrementing the reach of your brand through the scale of video platforms like YouTube.³ Challenge your brand to think beyond just entertaining content, and focus on building content that educates and informs consumers about common symptoms and conditions.

Think Mobile First: The opportunities associated with mobile search have become a vital part of the OTC purchasing journey. The brands that will benefit most from this new way of accessing healthcare information are those that are ready, relevant and visible the moment a health-related need is identified.

Sources

1. Google & Ipsos Reid, OTC Consumer Path to Purchase, Summer 2015. OTC categories included: allergy & inflammation, cough & cold, indigestion & GI remedies, pain management, teeth sensitivity, and vitamins & supplements. n=1,500 Canadians.
2. comScore Media Metrix (multi-platform): Key Measures report - health information category, November 2015, Canada.
3. eMarketer, Digital Video Viewers and Penetration in Canada, 2013 - 2019, June 2015.
4. Google Data, January 15 - October 15, OTC healthcare categories, Canada.