

A black and white photograph of a woman in a bathroom. She is wearing a tank top and a skirt, with her hair in a ponytail. She is holding a small bottle of medicine in her left hand and looking down at it. Her right hand is on the handle of a white cabinet door. In the foreground, there is a white sink with a faucet and a soap dish. The background shows a window with blinds.

Consumer Ailments and Remedies

a global Nielsen
consumer report

August
2007

nielsen
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Headaches, colds and back aches are the most common health complaints, according to a new Nielsen global survey

- Consumers show strong loyalty towards 'tried and tested' over-the-counter (OTC) brands
- Chinese consumers are most influenced by health-remedy advertising, with ad spend topping US\$9 billion in 2006... the equivalent of seven 'healthy' ad dollars for every Chinese citizen!

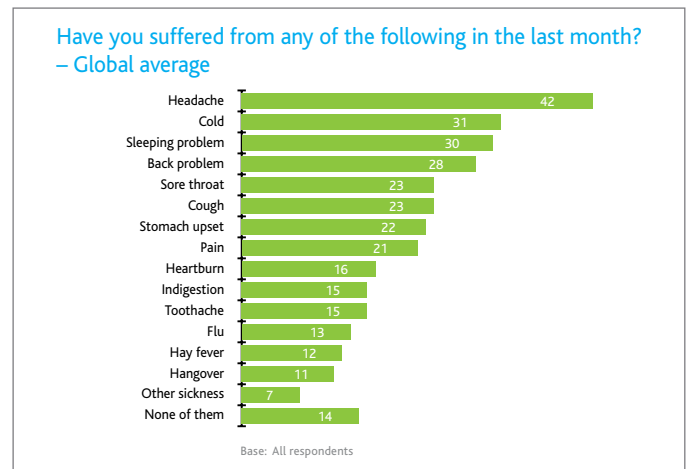
Key findings from a global health survey conducted by The Nielsen Company has found that *headaches, colds, sleeping problems* and *back aches* are the most common ailments of the world's consumers, and when it comes to their treatment in an industry estimated to be worth over US\$70 billion, consumers are loyal and habitual purchasers of Over-The-Counter (OTC) self-medication products.

Nielsen polled 26,486 internet users in 47 markets from Europe, Asia Pacific, the Americas and the Middle East at the end of April this year, asking them what ailments they had suffered in the last month, and what actions they took to remedy them.

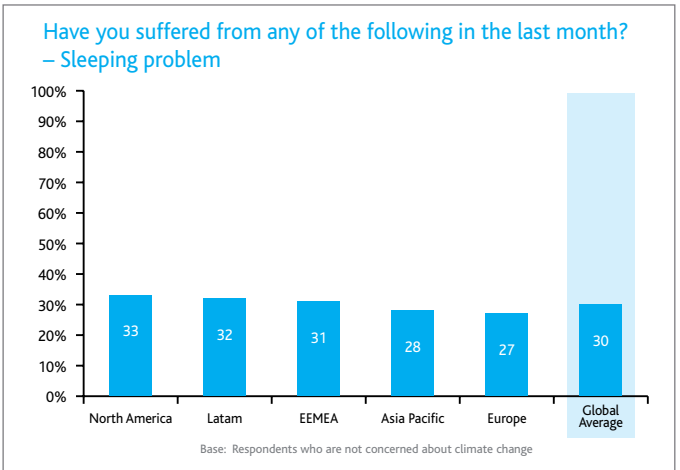
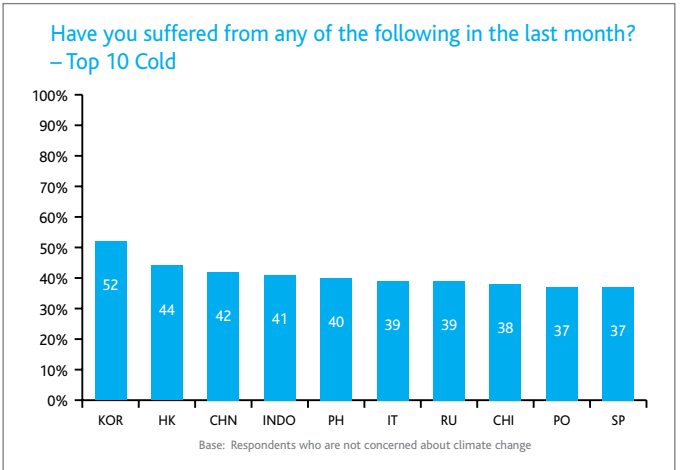
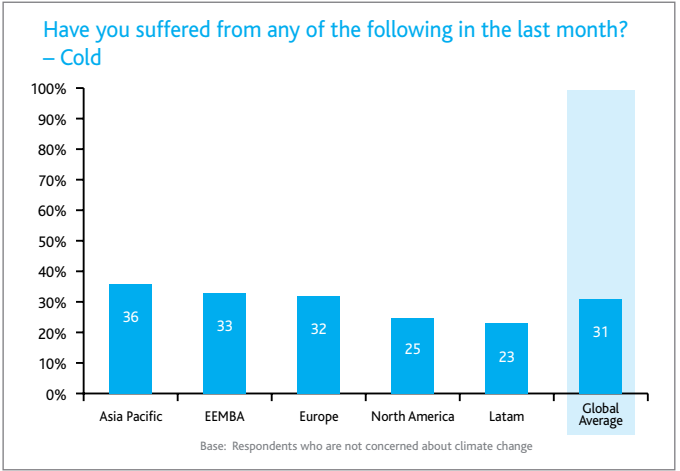
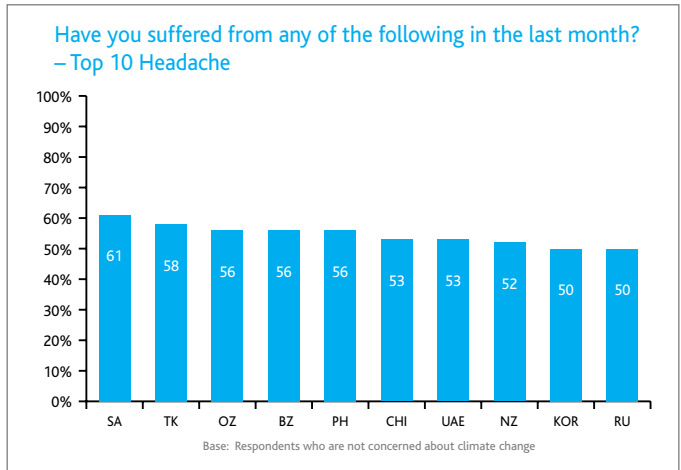
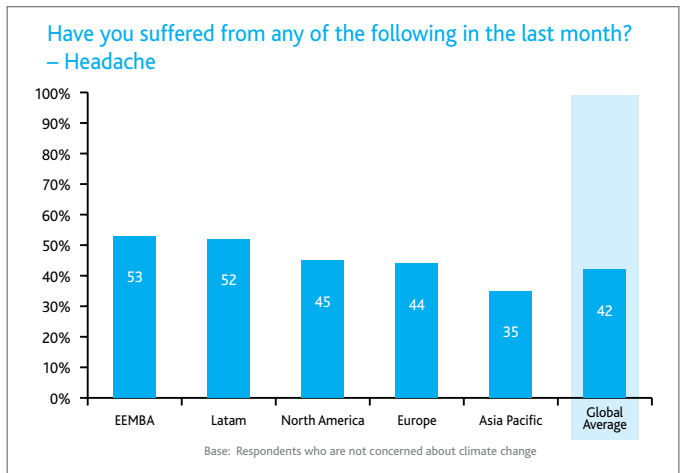
Nearly half (42%) said they reached for their usual 'tried and tested' medication at home during times of ill health, and one in three either saw their doctor or visited a pharmacy in search of an Over-The-Counter recommendation.

The Nielsen survey found *headaches* to be the most common complaint for consumers around the world – and may explain why analgesics are the largest category in the OTC market.

Nearly half of those polled in the online survey (42%) claimed to have suffered a *headache* in the last four weeks, while one in three had suffered a *cold, back ache* or *sleeping problem*. One in five suffered from a *cough, sore throat, stomach upset* or some other kind of *pain*.



The Nielsen Company's 47 country survey also revealed diverse regional differences among populations when it comes to their health problems. EEMEA and Latin American consumers suffer more headaches, with more than half in these regions saying they had suffered a headache within the last month. Asians (36%) were more susceptible to catching colds than any other region and are more likely to suffer from sore throats, coughs, stomach pain and toothache than they would a back problem, unlike those in North America and Latin America.



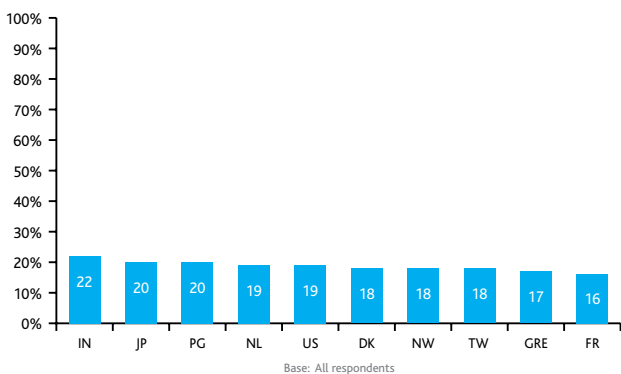
Have you suffered from any of the following in the last month?
– Top 10 Sleeping problem



The Nielsen study uncovered an interesting phenomenon in Asia Pacific. China has the world's biggest insomniacs, with four in 10 Chinese claiming to have suffered sleeping problems in the past month.

Indians, Japanese and Portuguese were the healthiest consumers according to the Nielsen survey, with one in four claiming not to have suffered any health ailments at all in the previous month. At the other end of the scale, consumers in South Korea claimed to suffer from most ailments, topping global rankings for suffering from indigestion, colds, heartburn, indigestion and toothaches.

Have you suffered from any of the following in the last month?
– Top 10 None of them

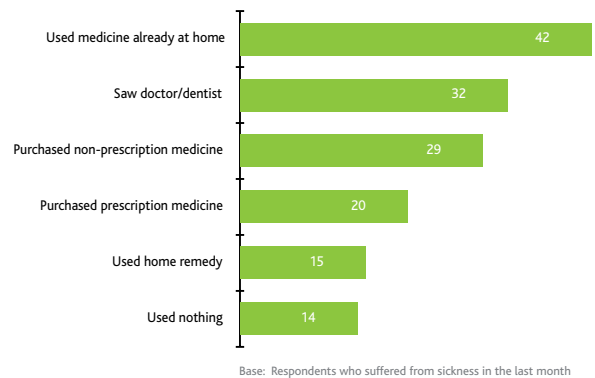


How consumers treat their ailments

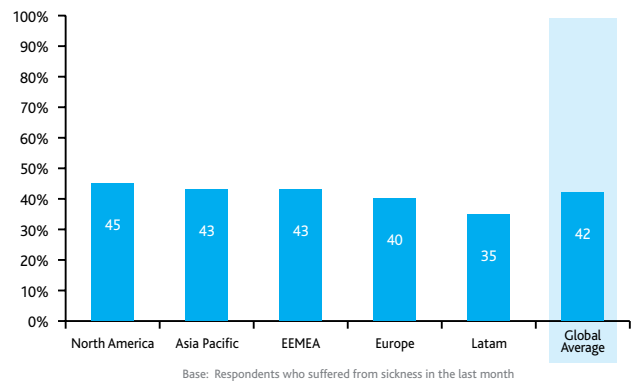
The Nielsen survey found three factors influenced what consumers did when they fell ill: strong *product loyalty* towards 'tried and tested' brands they have always used; a *reliance on medical professionals*; and *deeply rooted cultural 'home remedies'* – especially in Central and Eastern European countries and throughout Asia.

Nearly half (42%) said they reached for their usual 'tried and tested' medication at home during times of ill health, and one in three either saw their doctor or visited a pharmacy in search of an over-the-counter recommendation.

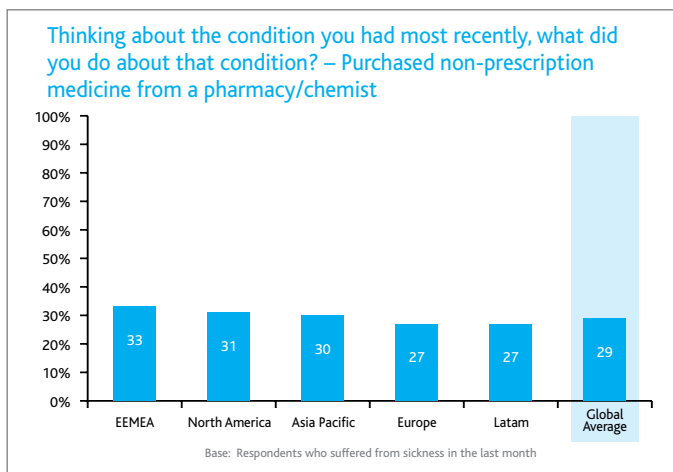
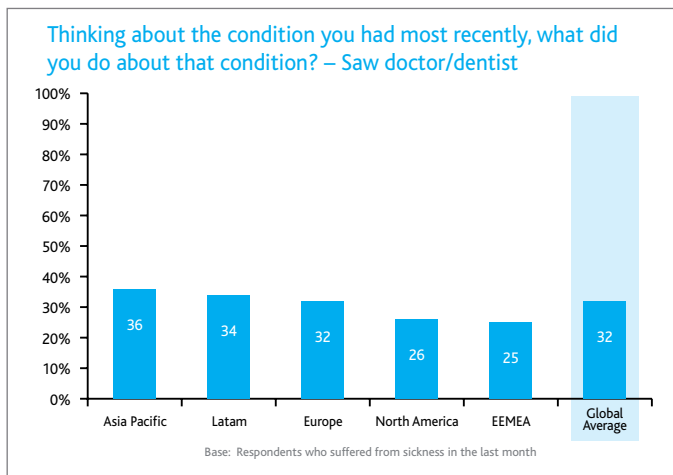
Think about the condition you had most recently, what did you do about that condition? – Global average



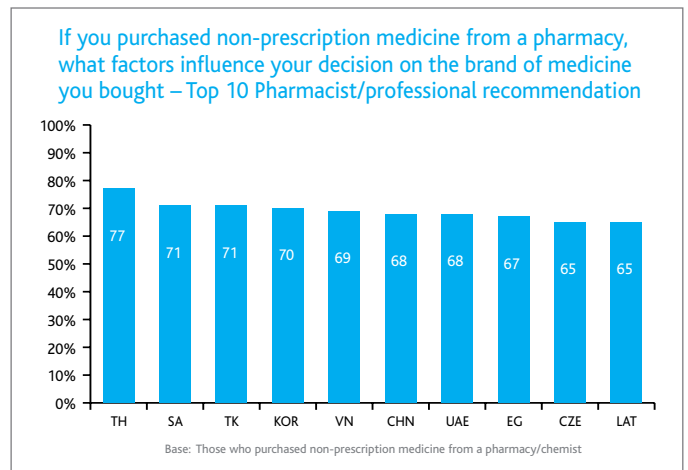
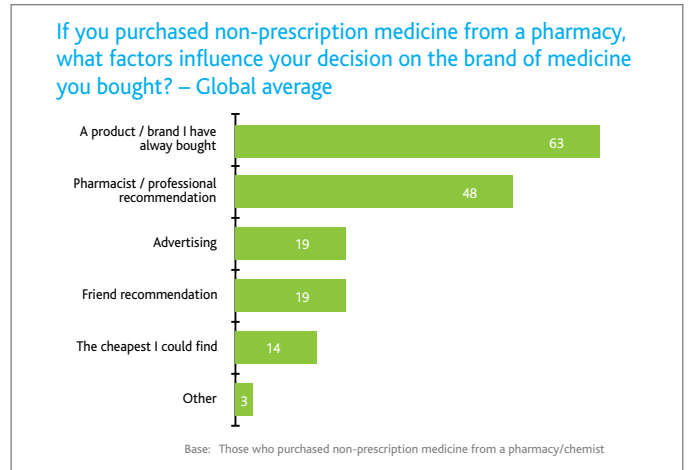
Thinking about the condition you had most recently, what did you do about that condition? – Used medicine already at home



The data reflects strongly the differences between North America and Europe in the way consumers access the OTC market. In North America, significantly more consumers indicated that they would visit the pharmacy when suffering from a minor ailment (35%) than visit the doctor (25%). In Europe, more consumers claimed to visit the doctor (29%) than get a non-prescription medicine from the pharmacy (27%). This was particularly true in France, where 44 percent of consumers would visit the doctor, reflecting the generous nature of healthcare cost reimbursement that still operates in that country.

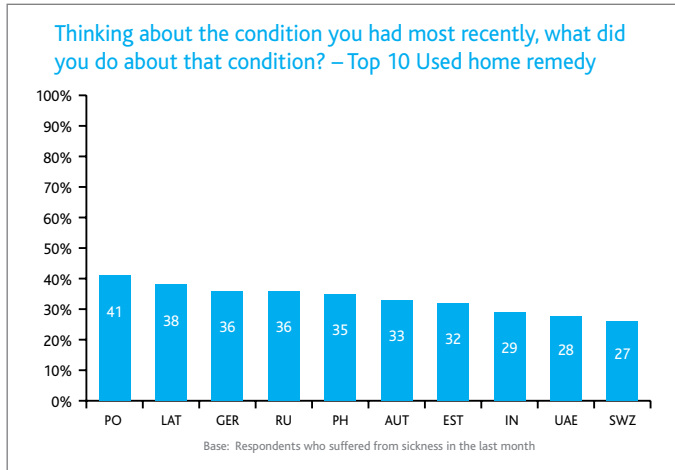


The Nielsen survey also indicates that once a consumer wants to purchase a non-prescription medicine, pharmacists continue to play an influential role across most of Europe, with 50 percent saying that they rely on the recommendation of the pharmacist. This compares to only 25 percent in USA where self-selection of products by consumers is widespread across retail outlets.

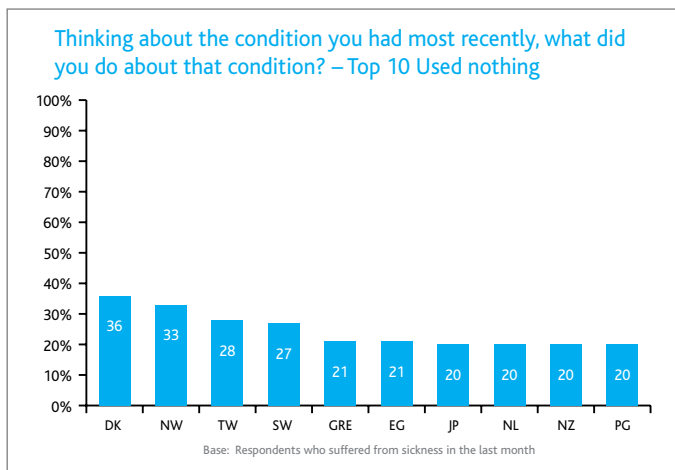


Traditional home remedies popular in some parts of the world

Several European and Asian countries prefer to rely on traditional home remedies. Consumers in Poland, Latvia, Russia, Germany and Switzerland were most likely to turn to age-old remedies rather than visit the doctor or pharmacy.

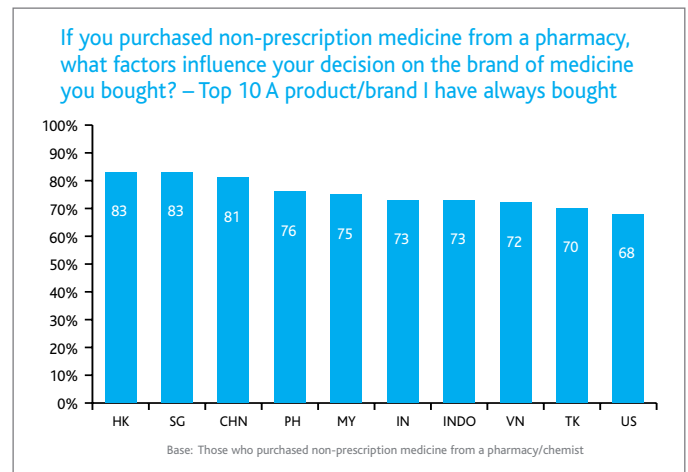


Scandinavians, on the other hand, are more likely to ‘grin and bare it’ – one third of Danish (36%) and Norwegians (33%) lead the global rankings for taking ‘nothing at all’ to cure their health complaint.



Asians the most loyal to OTC Brands ...

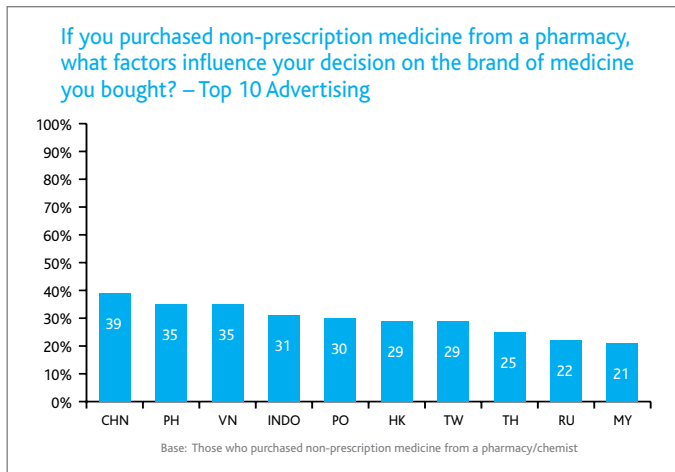
Overwhelmingly, the most *loyal* consumers of OTC/self medication products are Asians – over 80 percent of Hong Kong, Singaporean and Chinese consumers say they always buy the same ‘tried and tested’ products. 68 percent of North Americans also say they always buy the same brand of self-medication. The other factors that influenced what consumers did when they fell ill were *reliance on medical professionals; and deeply rooted cultural ‘home remedies’* – especially in Central and Eastern European countries and throughout Asia.



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...and they rely on OTC Advertising, particularly the Chinese

While only one in five global consumers (19%) said they were influenced by advertising or a friend's recommendation in trying new OTC medications, eight of the top 10 markets likely to rely on the word of advertising hailed from Asia Pacific, lead by the Chinese, where the influence of advertising in OTC purchasing decisions is the highest in the world. Thirty nine percent of Chinese consumers say their self-medication purchasing decisions are influenced by ads.



This will be music to the ears of OTC and Pharmaceutical companies in China, who invest heavily to advertise their brands to Chinese consumers who appear to trust them more than they do doctors or pharmacists. According to Nielsen Media Research, Pharmaceutical was the most advertised Category in China in 2006, spending a staggering US\$9 billion – or around seven dollars for every Chinese citizen – and up 17 percent on the previous year.

To put this into perspective, the amount spent on pharmacy advertising in China equates to almost 75 percent of *all media* advertising in the next two biggest advertising markets in the region - Australia and South Korea.

For OTC companies, the challenge lies in encouraging consumers to switch brands in a category characterized by *auto-pilot* purchasing, shopper loyalty and the added element of deep cultural traditions of self medication in many countries. Through consumer research and work with OTC companies, Nielsen has found humor and strong lifestyle associations with the local culture have proven successful, especially in emerging markets where the OTC market is immature but developing fast.

About the Global Online Consumer Survey

The Nielsen Global Online Consumer Survey is conducted twice a year to gauge consumer attitudes and opinions to a variety of topics and current affairs. The April 2007 survey was conducted in 47 Markets: Argentina, Australia, Austria, Belgium, Brazil, Canada, Chile, China, Czech Republic, Denmark, Egypt, Estonia, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Indonesia, Ireland, Italy, Japan, Korea, Latvia, Lithuania, Malaysia, Mexico, Netherlands, New Zealand, Norway, Philippines, Poland, Portugal, Russia, Thailand, Singapore, South Africa, Spain, Sweden, Switzerland, Taiwan, Turkey, UAE, United Kingdom, US and Vietnam. The margin of error of the survey is +/- 4% for n=500 and +/- 3% for n=1000.

Nielsen launches NielsenHealth, a specialised service for the healthcare industry

NielsenHealth to Help Clients Anticipate Patient Trends and Become More “Consumer Centric” in Healthcare

The Nielsen Company has recently announced the launch of NielsenHealth, a specialised service dedicated to providing transparency, effectiveness and efficiency for clients seeking a better understanding of the healthcare consumer. NielsenHealth will provide clients with “consumer centric” analytical tools to more effectively understand and address the attitudes, behaviours and needs of patients and physicians.

“With healthcare becoming increasingly consumer driven, it is important for those in the industry to view patients and physicians as consumers,” said Matthew Dumas, Managing Director of NielsenHealth. “Unlike any other service available today, NielsenHealth utilises a broad selection of proven analytical tools and data sources from healthcare and related industries that bring deeper insights concerning the patient and physician.”

NielsenHealth will help clients, like pharmaceutical (Rx) and over-the-counter (OTC) manufacturers, drive greater efficiency and effectiveness in how they target, reach and communicate with patients, consumers and physicians. By integrating all health-related information from The Nielsen Company, NielsenHealth provides breakthrough capabilities in areas like trendspotting, segmentation, physician messaging and advertising effectiveness. In addition, NielsenHealth will address many unmet needs of the healthcare industry, including:

- 360 degree understanding of how patients treat their conditions and manage their lifestyles, and how best to reach them
- Optimising resource allocation among physician detailing and Direct-To-Consumer (DTC) channels
- New product (Rx and OTC) launch forecasting
- Improved TV and online media targeting
- Tracking real time disease outbreak in the United States
- Measuring the impact of in-store clinics for drug retailers

Mr. Dumas concluded, “The convergence of healthcare and retail, the popularity of high deductible medical insurance, and growing importance of efficient patient and physician targeting means that our healthcare industry clients must become more ‘consumer centric.’ Only NielsenHealth has the established expertise and capabilities to address that need.”

The 47 Markets Included:

Argentina (ARG),
Austria (AUT),
Brazil (BZ),
Chile (CHI),
Czech Republic (CZE),
Egypt (EG),
Finland (FIN),
Germany (GER),
Hong Kong (HK),
India (IN),
Ireland (IRE),
Japan (JP),
Latvia (LAT),
Malaysia (MY),
Netherlands (NL),
Norway (NW),
Poland (PO),
Russia (RU),
Singapore (SG),
Spain (SP),
Switzerland (SWZ),
Turkey (TK),
United Kingdom (UK),
Vietnam (VN).

Australia (OZ),
Belgium (BE),
Canada (CA),
China (CHN),
Denmark (DK),
Estonia (EST),
France (FR),
Greece (GRE),
Hungary (HUN),
Indonesia (INDO),
Italy (IT),
South Korea (KOR),
Lithuania (LITH),
Mexico (MX),
New Zealand (NZ),
Philippines (PH),
Portugal (PG),
Thailand (TH),
South Africa (SA),
Sweden (SW),
Taiwan (TW),
UAE (UAE),
US (US),

About The Nielsen Company

The Nielsen Company is a global information and media company with leading market positions and recognized brands in marketing information (ACNielsen), media information (Nielsen Media Research), business publications (Billboard, The Hollywood Reporter, Adweek), trade shows and the newspaper sector (Scarborough Research). The privately held company is active in more than 100 countries, with headquarters in Haarlem, the Netherlands and New York, USA. For more information, please visit: www.nielsen.com.

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