Top 100: Pharmacy Shopper Behaviour

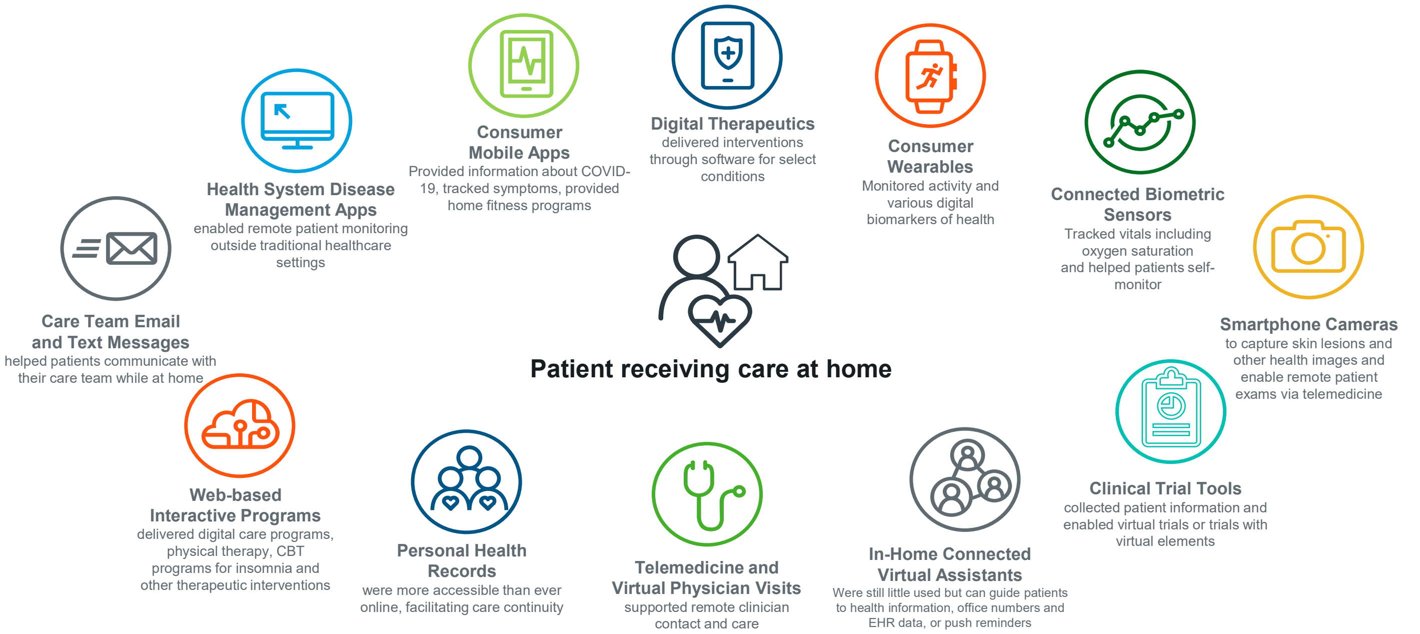
Pre-pandemic, it was recognized that patients were evolving from a passive consumer of healthcare into a proactive and forward-looking consumer which was driving new expectations for the OTC industry. This move towards self-care was also evident in the digital health market, IQVIA's General Manager Gwynne Morley notes.

"The Covid-19 pandemic has rapidly thrust patients and physicians into a world of digital health tools. By severing patients from face-to-face physician interaction for periods it has shifted care provision dramatically to telemedicine for virtual visits.[17] At the same time, a concerned public turned to digital media on their smartphones as a source of information on Covid-19 and sought advice to keep themselves safe. They similarly turned to apps, wearables and digital media to help them exercise and maintain their health (see figure 6).

"Digital health had been slowly becoming part of the therapeutic paradigm alongside traditional medicines before COVID-19, and this process has been somewhat accelerated by regulatory agencies adapting to unprecedented times.

"For instance, in the U.S. during the pandemic, the U.S. Food and Drug Administration (FDA) recognized that digital therapeutics could provide value in addressing mental health and wellbeing during quarantine and isolation, and waived some requirements to enable their distribution and use.[18] Overall, the pandemic has amplified the need for care provision and remote patient monitoring outside traditional healthcare settings, patient self-monitoring using various connected devices, and digital therapeutics that can deliver interventions via apps."

Figure 6: Digital Health Tools in the Patient Journey During COVID



Report: IQVIA Institute for Human Data Science. Digital Health Trends 2020: Innovation, Evidence, Regulation and Adoption
Source: IQVIA Institute, Jun 2021

IQVIA INSTITUTE

Mobile Apps During Covid-19

The pandemic also saw impacts on the apps downloaded and used in 2020, driven by legitimate health anxiety, the search for health information, and the need to manage one's health during the pandemic and periods of lockdown.

Gwynne continues, "This trend occurred across a number of health app categories, including telemedicine app downloads like Doximity in the US that surged 37x from baseline to nearly 7000 downloads per week on just the Google Play store. Globally, exercise apps that helped patients stay healthy saw downloads quadruple, and mental health apps that helped those in need manage suicidal thoughts and depression, and blood pressure apps, increased more modestly by 50-100% (see figure 7)."

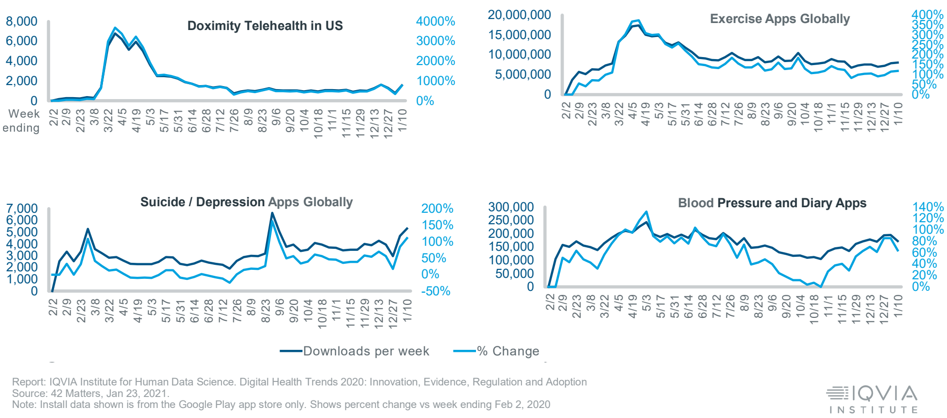
Consumer Wearables

Consumer wearable devices that enable individuals to track their activity, such as fitness trackers, smartwatches, sleep trackers and actigraphy devices, and parameter-specific biosensors that track various measures like temperature, glucose levels or blood pressure continue to serve as an element supporting patient wellness efforts, with their use increasing over the years.

"The downloading of apps tied to Pulse Oximeter devices that allow patients to monitor their oxygen saturation (SPO_2) notably spiked in response to the COVID-19 pandemic (see figure 8). As many people with Covid-19 were found to have low levels of oxygen in their blood even when feeling well, pulse oximeters — available at some pharmacies and stores without a prescription — were recommended as a way to track the emergence of low oxygen levels that could be an early warning sign that medical care is needed.[19] A scramble to download these helpful health apps occurred in waves around the globe and coincided with peaks in virus cases. Use of these device-associated apps increased by 9x-11x in the US and Europe, respectively, for periods then falling, and by 50-300x across other regions including Latin America and Africa, where the baseline use was lower."

She adds, "The growing demand and need for telehealth is likely to drive this trend further, as remote patient monitoring grows. However, at present, the most measured parameters of consumer wearables are heart rate, steps taken, distance traveled, and calories burned, which are linked to activity monitoring devices."

Figure 7: Percent Change Over Baseline in Health App Downloads During COVID-19 2020-2021



Trust in Pharmacy

Gwynne reflects that more patients are more ready to self-treat or to consult pharmacists in-store. "The ongoing pandemic had shown the vital role pharmacists played, as evidenced by a recent Behaviours and Attitudes (B&A) survey[20] in which 30 per cent of people stated that their pharmacists had become more important to them since the Covid-19 outbreak began[20], especially now that face-to-face access to general practitioners was, understandably, so much more difficult.

"The Ipsos MRBI Veracity Index 2021[21] published in March on 'Who do we trust most in 2021?' showed 96 % of people say that they generally trust local pharmacists. Nurses were second with 95%, followed by doctors with 94%. This was reinforced by the Customer Experience Ireland 2020 Report[2], which highlighted that pharmacies were among those sectors that provided the highest level of customer service and experience.

"In an IQVIA Consumer Health survey of industry executives conducted in June 2020, 39% of the respondents said that consumer behaviour was their key business priority[7]."

The following consumer behaviours were noted during the pandemic

(i) a shift in consumption and shopping habits - consumers were no longer browsing in-store, their purchases were focussed on the basic needs, they were shopping more consciously, buying local and were embracing digital commerce, and

(ii) when consumers were buying goods, they were becoming more focused on price, quality and availability across categories.

Gwynne continues, "Regional and local retail pharmacies also experienced an increase in purchasing share as customers stayed local and avoided town centres due to the various lockdown restrictions. Shopping local is likely to continue when considering the government's National Remote Work Strategy - the overall objective of which is to "ensure remote work is a permanent feature in the Irish workplace" in the future.

"Building a base of customer loyalty is a key element of successful brands, whether it be a product or a store. In this changing environment, a three-pronged approach is required to adapt to this change – focus on established brands, invest in brand health tracking, and deliver on the changing needs of consumers is key for post Covid-19 success. First, focus on fewer established brands. Consumers are seeking trust and reliability in what are uncertain times. So larger and better-known brands will likely win market share and sales growth ahead of smaller challenger brands in your portfolio. Consumers are reluctant to experiment or seek choices, they are not spending time browsing shelves as well.

"Second, invest in continuous brand health tracking as the consumer behaviours are evolving every week and their emotional state remains in flux. E-commerce has accelerated in recent months, but it will likely give up some of the gains as physical retail opens-up with easing of restrictions. Third, formulate the marketing and messaging model for your brands. Adopt a holistic approach to your messaging rather than focusing on product benefits. Consumers have limited mind space for processing new communications as their top priority remains with their family, health and finances."

References

[8] Source: https://www.rte.ie/news

[9] Source: IQVIA OTC Ireland Monthly Database, May 2020

[10] Source: IQVIA OTC Ireland Monthly Database, December 2020

[11] Source: IQVIA Consumer Health Global Forecasts, June 2021

[12] Source :https://www.ehealthireland.ie/News-media/Spotlight/Healthmail.html

[13] Source: IQVIA White Paper: e-Pharmacy and the New Consumer https://www.iqvia.com/library/white-papers/e-pharmacy-and-the-new-consumer-whitepaper

[14] Source: Fortune Business Insights

[15] Source: Pharmaceutical Society of Ireland (PSI): Draft guidance on the delivery of Prescription-Only Medicines from a Retail Pharmacy Business

[16] Source : PSI Website

[17] Source : IQVIA Institute for Human Data Science. Shifts in healthcare demand, delivery and care during the COVID-19 era: tracking the impact in the United States. 2020 Apr.

[18] Source : U.S. Department of Health and Human Services. Enforcement policy for digital health devices for treating psychiatric disorders during the coronavirus disease 2019 (covid-19) public health emergency: Guidance for industry and food and drug administration staff. 2020 Apr. Available at: https://www.fda.gov/media/136939/download

[19] Source : https://www.health.state.mn.us/diseases/coronavirus/pulseoximeter.html

[20] Source : On-line Survey carried out by Behaviour & Attitudes for the Irish Pharmaceutical Healthcare Association (IPHA) and Irish Pharmacy Union (IPU), September 2020

[21] Veracity Index 2021 (ipsos.com)

[22] Source : https://thecxcompany.com/wp-content/uploads/2020/10/2020-CX-Report.pdf

The IQVIA Top 100 OTC Products has been firmly established as the 'must read' overview report of Ireland's OTC medicines sector for almost a decade.

Irish Pharmacy News has been working with data analysts IQVIA for over 6 years in compiling and bringing this information to our readers, pharmacy professionals of Ireland.

This annual report has now become synonymous for showcasing Ireland's leading OTC brands, demonstrating their strength within respective category markets, brand leadership and loyalty.

IQVIA build The Top 100 Over-the-Counter (OTC) Market Report based on the total value of wholesale sales for OTC products into retail pharmacy over the course of the 12 months to April 2021 (May 2020-April 2021). It's a rolling annual value which includes the five major OTC categories including cold and cough remedies (CCR), pain, vitamins, and minerals (VMS), skin and digestive health.

In highlighting the value of the OTC market to community pharmacy, IQVIA General Manager Gwynne Morley explains, "The total value of the nonprescription market in Ireland based on IQVIA's data for the 12 months, May 2020 to April 2021, was €406 million.

"This market declined by 8.3% when comparing year-on-year growth[2] . The year-to-date (YTD) value of this market at the end of April 2021 was €141 million with a growth rate of -10.9%[3] . After the initial spike in OTC sales exhibited in March 2020 due to the onset of Covid-19, the market slowed down significantly resulting in a flat growth rate (0%) in 2020, this is in contrast to the 8% growth rate demonstrated for the full year 2019."

Sales across some categories fell due to numerous factors such as social distancing, isolation and shielding populations. Gwynne has presented with readers with an incredibly thorough explanation of all these factors in the preceding pages.

This year we have also included an overview of shopper behaviour during this incredibly challenging time, which should prove invaluable as community pharmacists and pharmacy business owners seek to adapt to the new 'normal' for their customers.

Covid-19 has dramatically hastened the pace with which digital offerings have become commonplace. Overall, the pandemic has amplified the need for care provision and remote patient monitoring outside traditional healthcare settings, patient self-monitoring using various connected devices, and digital therapeutics that can deliver interventions via apps.

More patients are more ready to self-treat or to consult pharmacists in-store. The ongoing pandemic had shown the vital role pharmacists played, as evidenced by a recent Behaviours and Attitudes (B&A) survey in which 30% of people stated that their pharmacists had become more important to them since the Covid-19 outbreak began. The Ipsos MRBI Veracity Index 2021[21] published in March on 'Who do we trust most in 2021?' showed 96 % of people say that they generally trust local pharmacists.

This was reinforced by the Customer Experience Ireland 2020 Report , which highlighted that pharmacies were among those sectors that provided the highest level of customer service and experience.

*Disclaimer: Please note that the six year comparison listed opposite details a range from Jan-April for the years 2015-19 & 2021 and from Jan-May for 2020. These, along with other comparisons with previous years, may include brands and categories whose classification may have changed over that period. The IPN/IQVIA Top 100 OTC products and the method of its collation evolves with the pharmacy sector and in this context, comparisons with previous years are for indicative purposes only. As such, all comparative data published in this issue is designed to offer readers a broad reference tool rather than a like for like comparison.

IQVIA™

	05/2021	04/2020	04/2019	04/2018	04/2017	04/2016
Solpadeine	1	1	1	1	1	1
Nurofen Plus	2	2	2	2	2	2
Calcichew-D3 Forte	3	10	10	8	10	10
Panadol Extra	4	4	3	3	3	4
nicorette	5	7	8	9	8	7
Gaviscon	6	8	9	10	9	8
Galfer	7	11	11	11	11	11
Nurofen Rapid Relief Maximum Strength	8	0	0	0	0	0
Paralief Paracetamol	9	12	7	5	7	12
Aveeno	10	14	14	14	14	14
Cetrine Allergy	11	16	16	15	16	16
Nexium Control	12	39	29	21	29	39
Nurofen	13	9	12	12	12	9
Contour next	14	48	43	39	43	48
Canesten	15	15	18	22	18	15
Hylo-Forte	16	81	63	47	63	81
Piriton	17	35	31	33	31	35
Calpol	18	5	5	4	5	5
Voltarol	19	30	27	25	27	30
Nurofen for Children	20	3	4	6	4	3
Senokot	21	23	24	24	24	23
Dettol	22	0	0	0	0	0
Daktarin	23	32	33	37	33	32
Dulcolax	24	0	0	26	0	0
OneTouch	25	65	55	44	55	65

IQVIA Top 100 Pharmacy Products

Product	05/2021	04/2020	04/2019	04/2018	04/2017	04/2016
NUROFEN EXPRESS	26	21	15	7	6	6
MAXILIEF	27	41	32	31	28	31
PANADOL	28	19	21	20	21	21
EASOFEN	29	32	18	38	45	29
OTRIVINE	30	34	34	32	32	28
DIORALYTE	31	17	16	16	15	18
PARACETAMOL PGO	32	54	0	0	0	0
PARACETAMOL GKC	33	96	0	0	0	0
NYTOL	34	0	0	0	0	0
BRUPRO	35	30	41	52	88	0
SOLPA EXTRA	36	49	57	69	0	0
ANTI HIST ALLERGY	37	47	59	97	0	0
DEEP HEAT	38	61	49	56	61	62
LACTULOSE FRS	39	0	0	0	0	0
SUDAFED	40	20	19	18	19	19
THEALOZ	41	78	0	0	0	0
SILCOCKS BASE OVE	42	58	60	81	82	79
MOTILIUM	43	37	26	28	22	20
FYBOGEL	44	59	52	51	48	44
VERMOX	45	53	53	54	59	57
NIQUITIN	46	56	64	63	75	0
PANADOL ACTIFAST	47	55	68	67	68	61
CALDESENE	48	60	47	50	49	52
ZIRTEK	49	62	23	35	40	47
CALPOL SIX PLUS	50	13	20	19	26	24
CORSODYL	51	57	55	46	47	51
BEROCCA	52	44	43	42	38	34
BONJELA	53	66	56	57	56	56
SUDAFED NASAL	54	51	48	55	60	59
ARTELAC	55	63	50	49	41	38
CALPOL VAPOUR	56	64	80	0	0	0
LEMSIP	57	9	14	13	13	13
NICOTINELL	58	71	58	53	50	46
GLUCOJUICE M+U	59	0	0	0	0	0
PANADOL NIGHT	60	67	0	0	0	0
BUPLEX	61	45	54	23	46	0
CAVILON	62	79	88	96	0	0
SUDOCREM	63	70	44	43	93	0
LISTERINE	64	68	61	60	52	49
ALFLOREX	65	80	81	98	0	0
SAVLON	66	81	70	71	64	80
IMODIUM	67	50	45	48	57	55
BUSCOPAN IBS	68	76	77	0	0	0
DIFFLAM	69	43	42	40	39	36
STREPSILS	70	23	28	27	23	22
CYSTOPURIN	71	74	72	74	69	68
SONA VITAMIN D3	72	0	0	0	0	0
JAKEMANS	73	84	0	0	0	0
SINUTAB	74	46	46	45	44	40
CERUMOL	75	89	79	83	78	75
ELAVE	76	87	85	86	84	77
BROLENE	77	65	69	66	66	64
E 45	78	77	71	64	62	54
SEVEN SEAS C L O	79	86	82	75	71	73
RENNIE	80	73	66	70	65	60
PHENERGAN	81	97	0	0	0	0
ZOVIRAX GLX	82	83	76	79	83	76
IDEOS	83	85	89	89	77	71
OPTREX	84	0	0	0	0	0
ANUSOL	85	0	0	0	0	0
BRONCHOSTOP JUNIOR	86	52	0	0	0	0
BEPANTISEPTIC	87	95	92	88	79	66
VICKS	88	48	63	58	42	45
GAVISCON EXTRA STR	89	92	90	85	80	91
B D MICRO FINE	90	100	98	0	0	0
D PEARLS	91	0	0	0	0	0
VYGON NELATON CATH	92	0	0	0	0	0
CORTOPIN	93	90	91	65	36	50
ACTIFED	94	69	62	59	53	53
CB12	95	94	74	78	74	74
BUTTERCUP BRONCHO	96	36	33	29	25	33
THERMACARE	97	0	0	0	0	0
AQUEOUS	98	0	0	0	0	0
BIO KULT PROBIO	99	0	0	0	0	0
BARD DRAINAGE	100	0	0	0	0	0