

Every Day Healthcare 2

June 5th 1997

*Prepared for the Proprietary Association
of Great Britain
by
BMRB International*



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The Everyday healthcare Study

- In 1986, PAGB the trade association for the manufacturers of over the counter medicines asked the British Market Research Bureau to conduct the first national survey of everyday healthcare in Britain.
- In 1996/97 the study was repeated using the same methodology
- Together these studies show how people in Britain view their health, their sources of advice and information and how they treat minor ailments
- These data have been made available to government, health professional bodies, academics and the media.
- They underpin PAGB positions and comments on self-care in Britain.



The Everyday healthcare Study

- The Everyday Healthcare Study shows that the British public are sensible and cautious in their use of medicines. We are not a pill for every ill society
- With the right advice and help people are confident that they can manage minor ailments themselves and they do so.
- People value the availability of over the counter medicines
- People find OTC medicines effective and they tend to use the same product each time they experience the same illness.
- The doctor is still the most important advisor and health care influence
- Many people are visiting doctors for advice and treatment of ailments that they could manage themselves



Overview

- Methodology
- General health, lifestyle and attitudes
- Incidence and treatment of ailments
- Use of OTC medicines
- Children's ailments, treatment and OTC use
- Conclusions

Methodology

- 2033 interviews, with adults aged 15+years, GB
- c170 interviews every month, May '96 - April '97
- The sample is nationally representative collected by Random Location sampling methods,
- Face to face interview lasting on average 40 minutes
- The data on children was gathered by interviewing housewives on the pattern of treatment of their children's ailments



General health, lifestyle and attitudes



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Weight/Exercise

- Almost half (48%) of all adults had a normal body mass index, but over a quarter are overweight (28%) and 9% are obese.
- 72% of respondents claimed to take exercise at least once or twice a week, and 30% claim to take exercise everyday
- There is little difference in the BMI of respondents who claim to exercise most often compared with those exercising least
- About a third (32%) of respondents had dieted in the last year and many more women than men had done so (39% of women/25% of men)

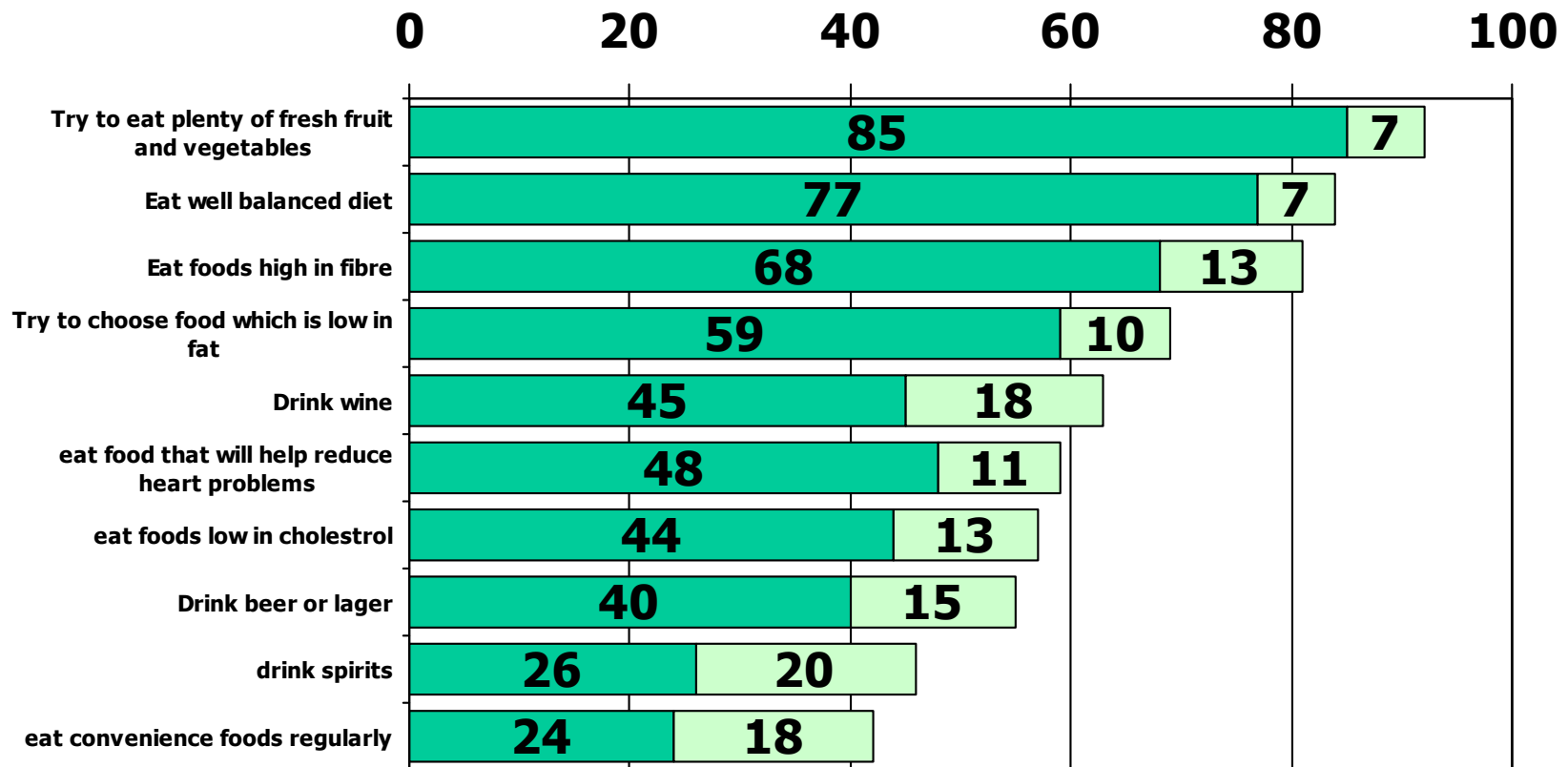


Respondents' rating of own health

- 70% of respondents felt that their own health was 'very' or 'fairly' good
- only 6% described their health as 'poor' the rest considering they were average
- 50% claimed not to worry very much or at all about their health
- not surprisingly, those rating their health as good were less likely to worry about their health.
- Nevertheless 25% of those saying their health was good said they worried at least 'a little ' about it; versus 60% of those rating their health as poor
- average days off work/in bed =7.6; higher for men and 35 - 49 year olds



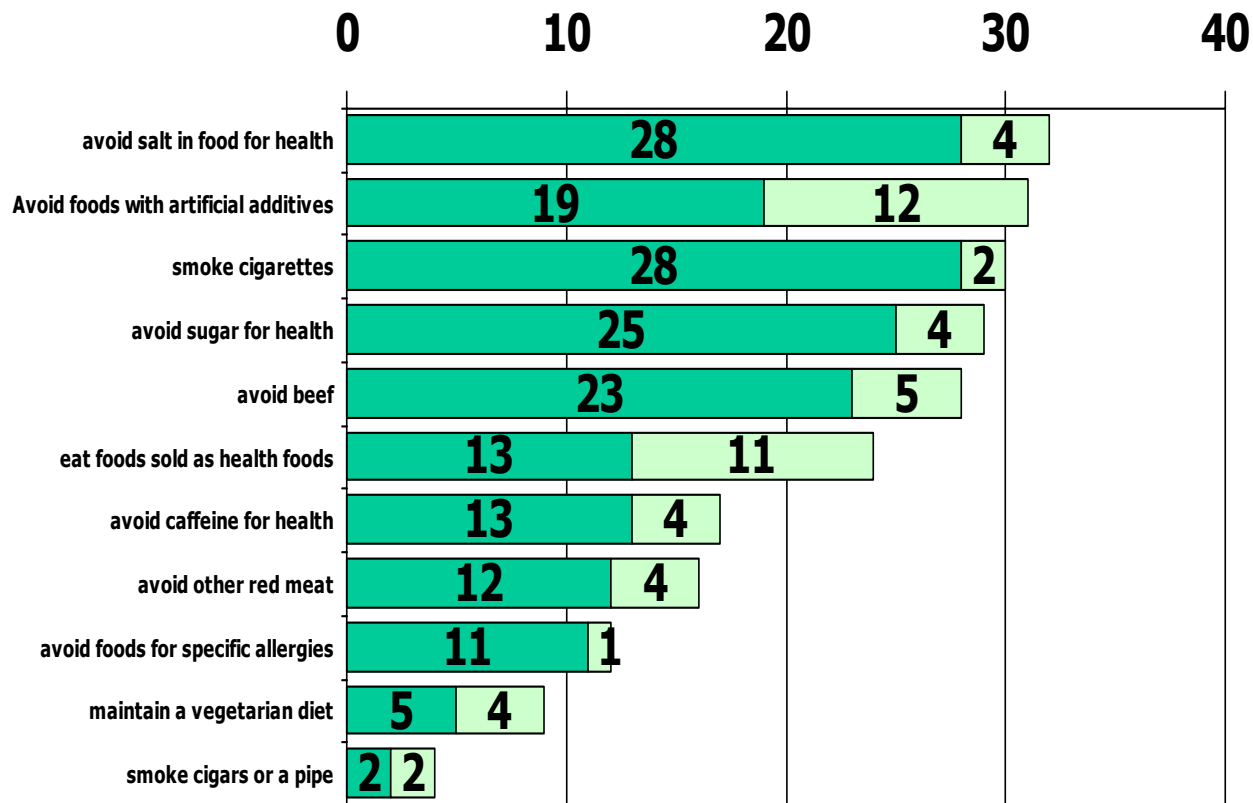
General health: things done nowadays (1)



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General health: things done nowadays (2)



Vitamins and Food Supplements

- 35% of respondents take vitamins/food supplements nowadays
- 69% of those taking any, take only one product, but the mean number taken is 1.5, reflecting multiple usage by some respondents

Most frequently taken vitamins/supplements

- Cod liver oil/halibut oil 14% (27%/65+)
- Multivitamins 10%
- Vitamin C 5%
- Evening primrose/
starflower oil 5%
- Garlic oil/pearls capsule 4%
- Multivitamins and minerals 3%



Base all adults (2033)

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Reasons for taking vitamins/supplements

- For arthritis/to ease joints 25%
- Replace things missing from diet/
help balance diet 20%
- Good idea/good for you 17%
- To prevent cold/viruses 13%
- For menstrual problems* 13%
- For the heart 7%
- Advised to 6%
- Feeling run down 5%

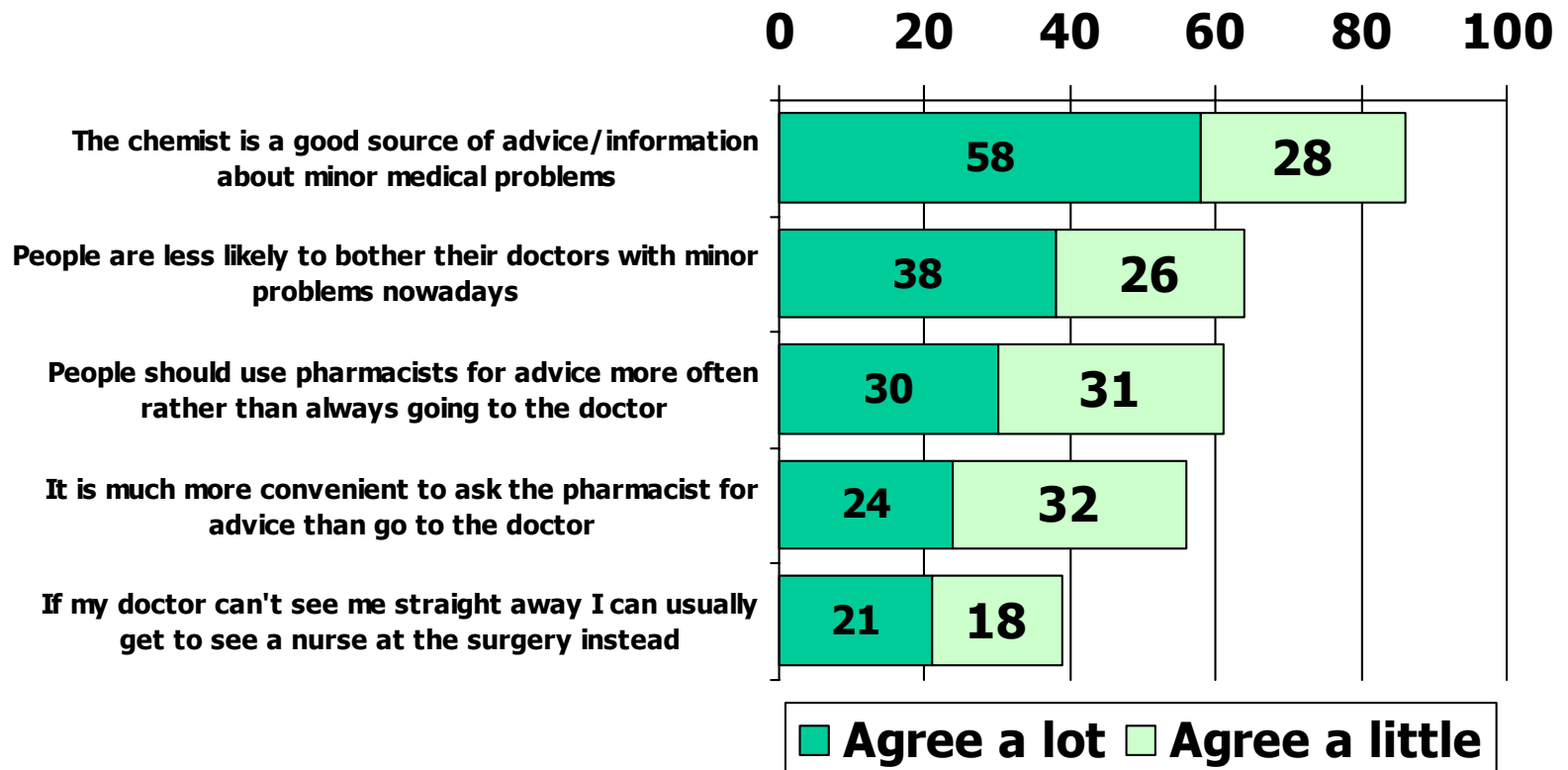


Base: All adults taking vitamins/supplements (733)

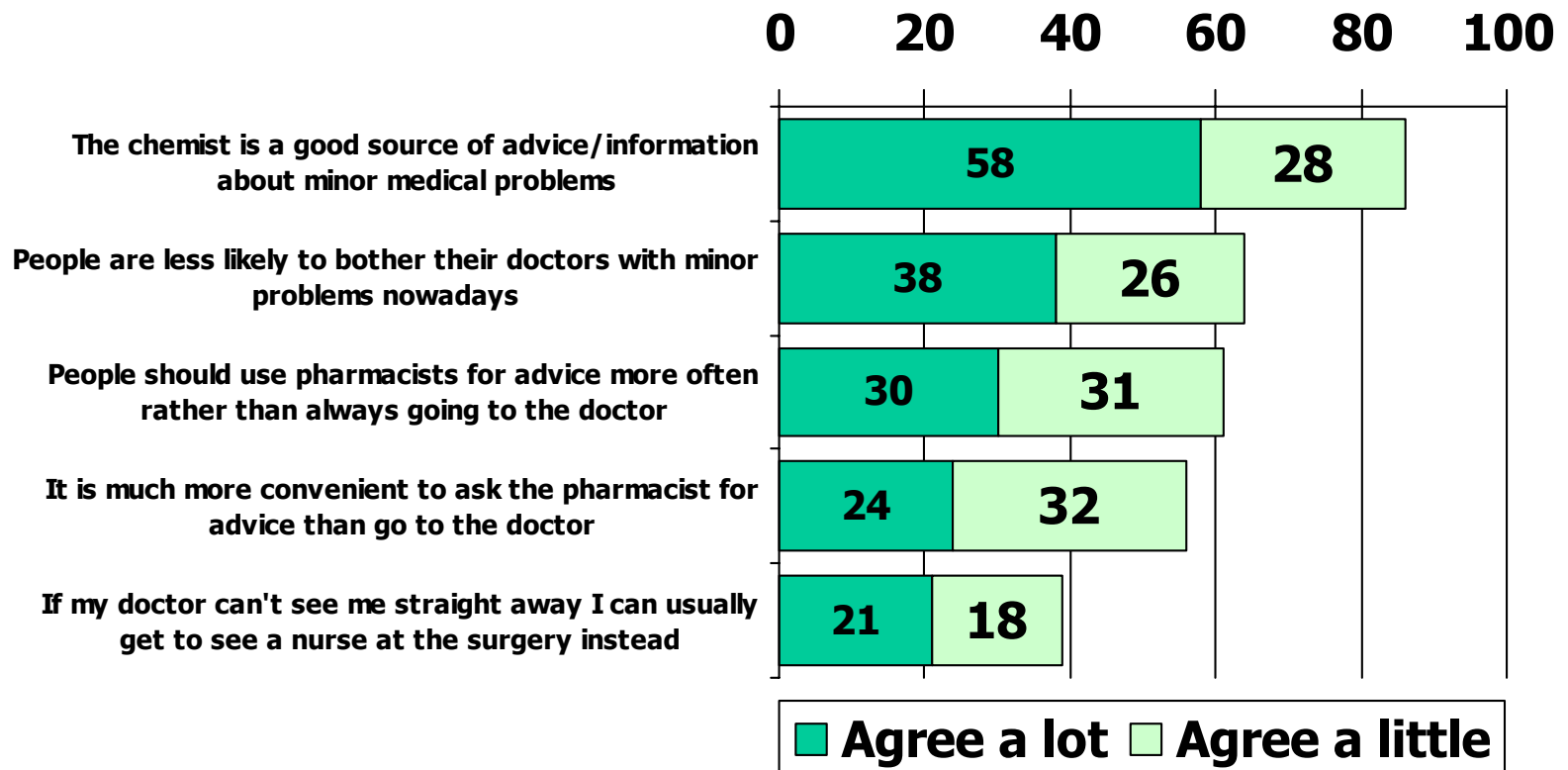
*All women taking vitamins/supplements (466)

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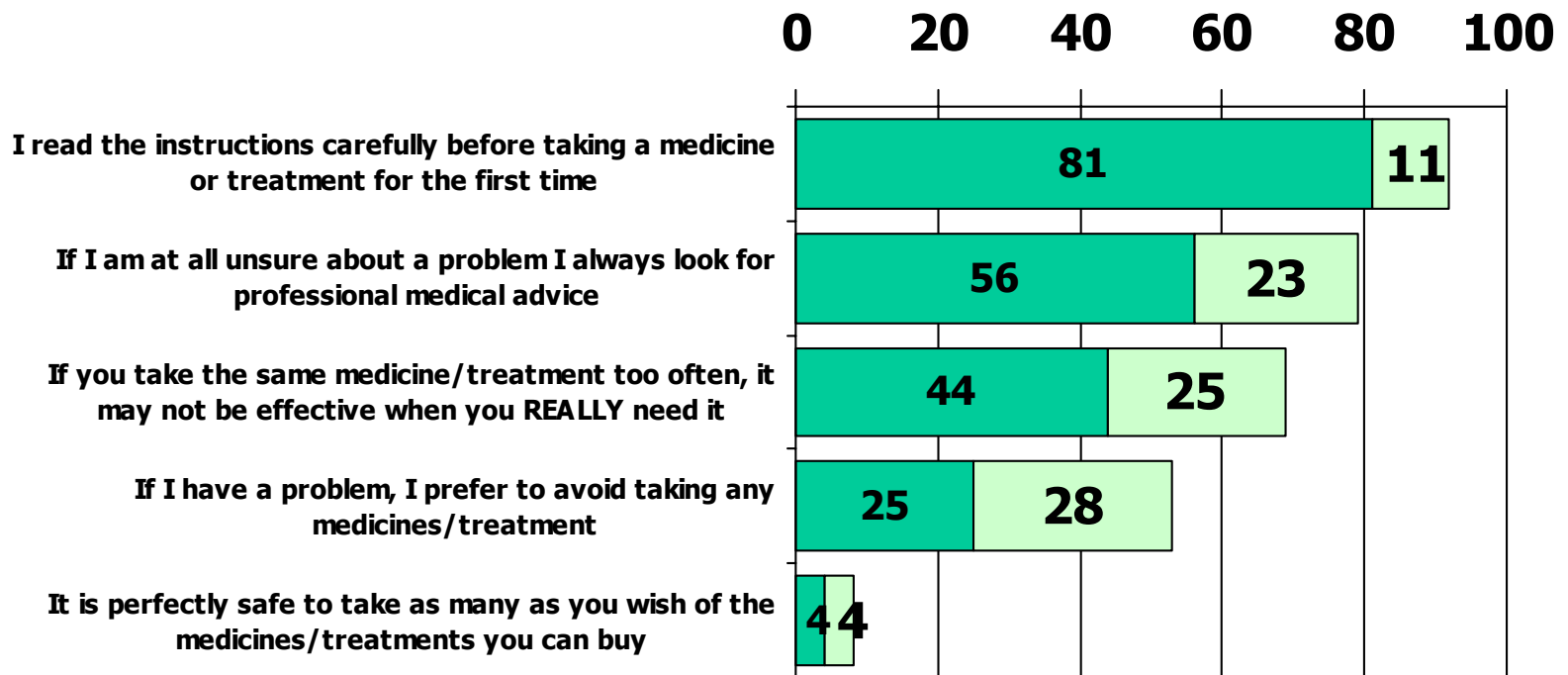
Attitudes to using doctors/pharmacists (1)



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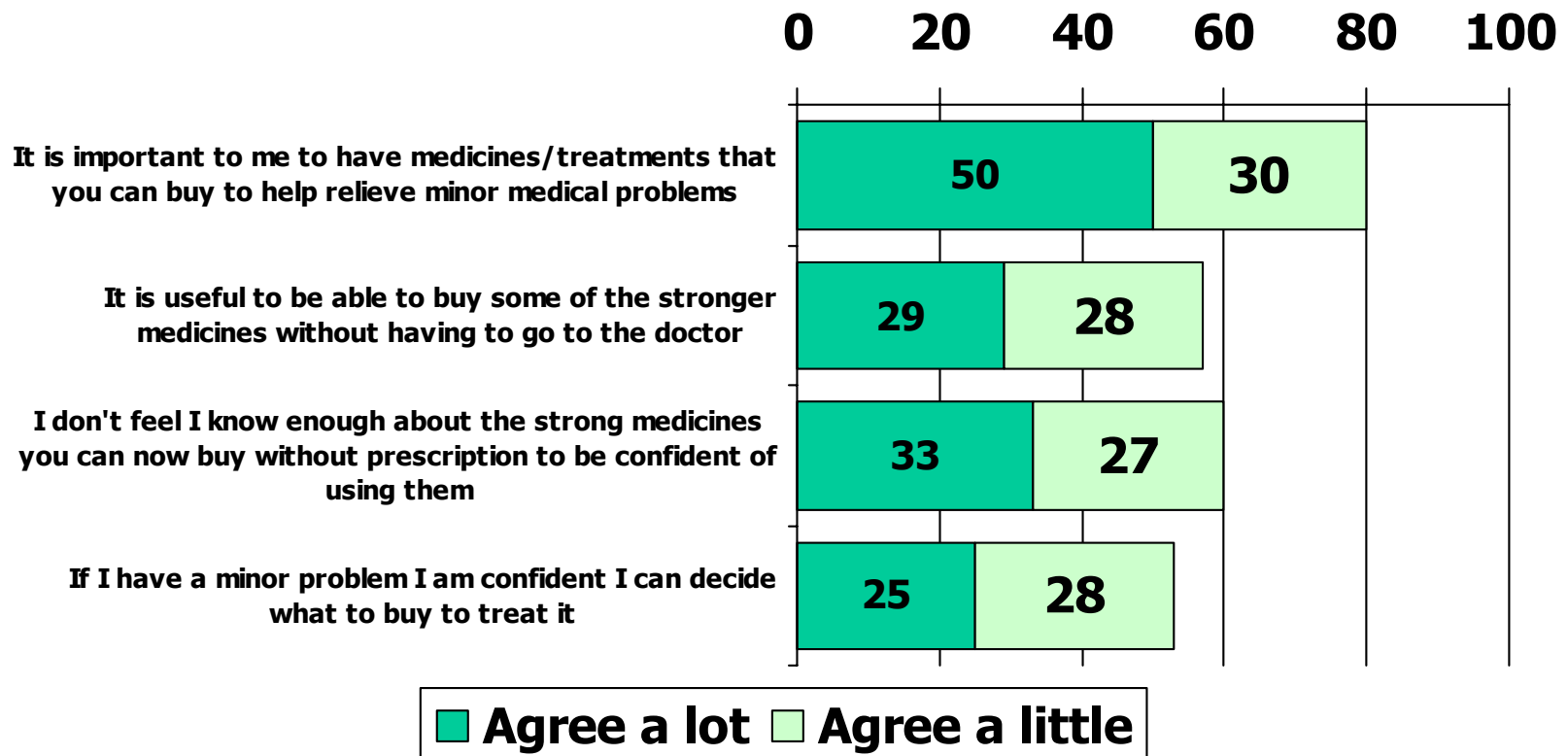
Attitudes to self-medication (1)



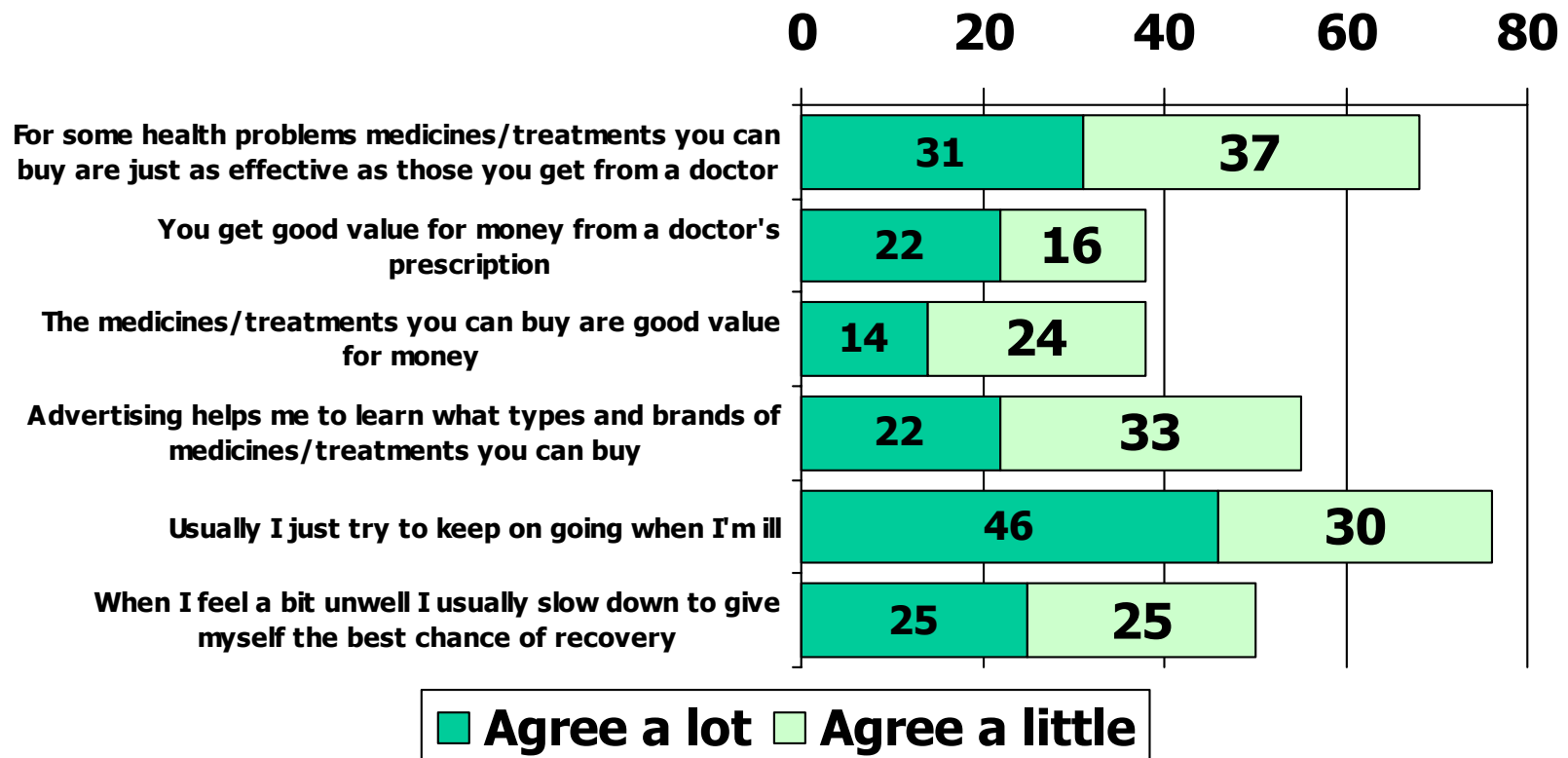
■ Agree a lot ■ Agree a little



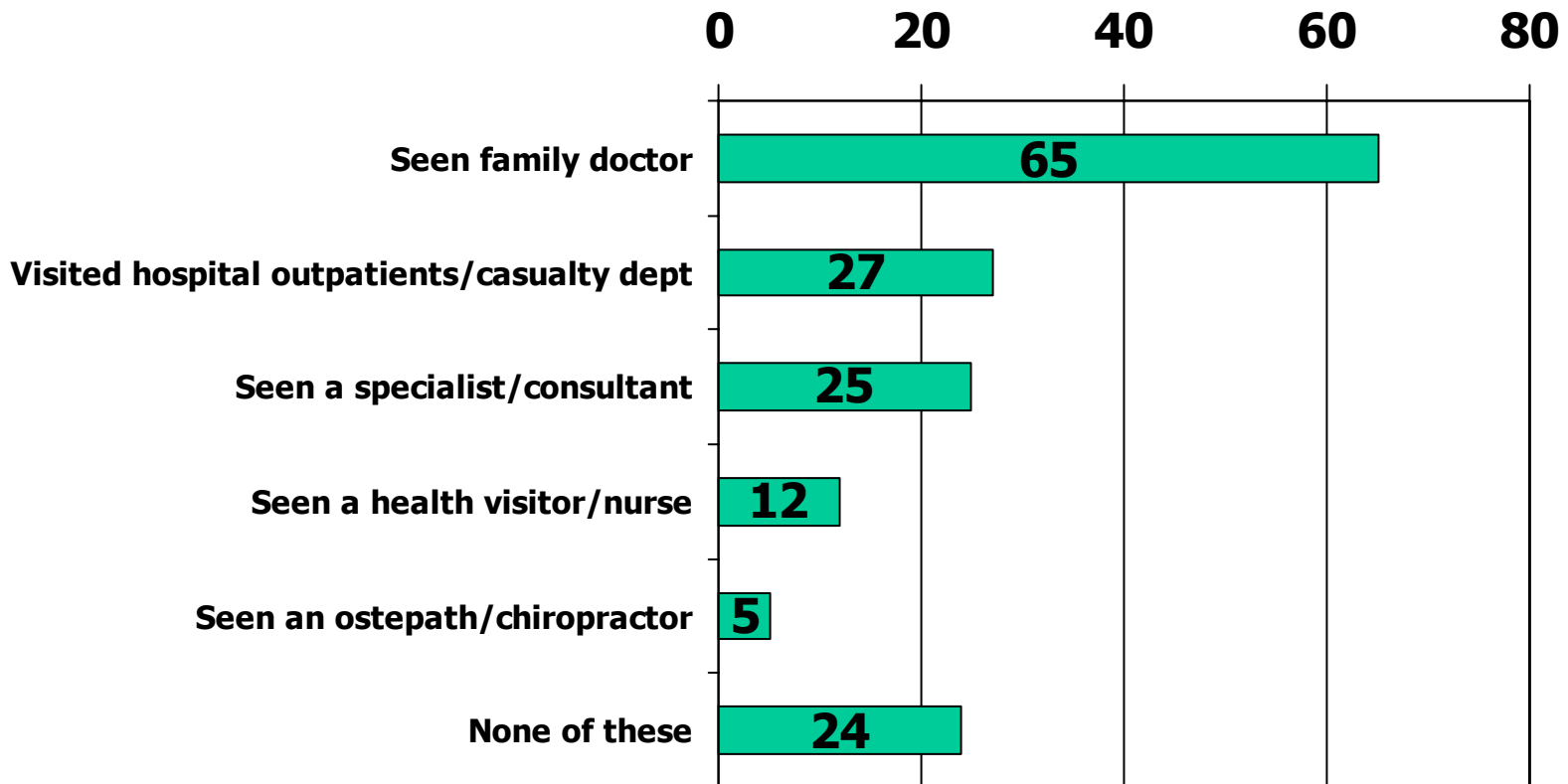
Attitudes to self-medication (2)



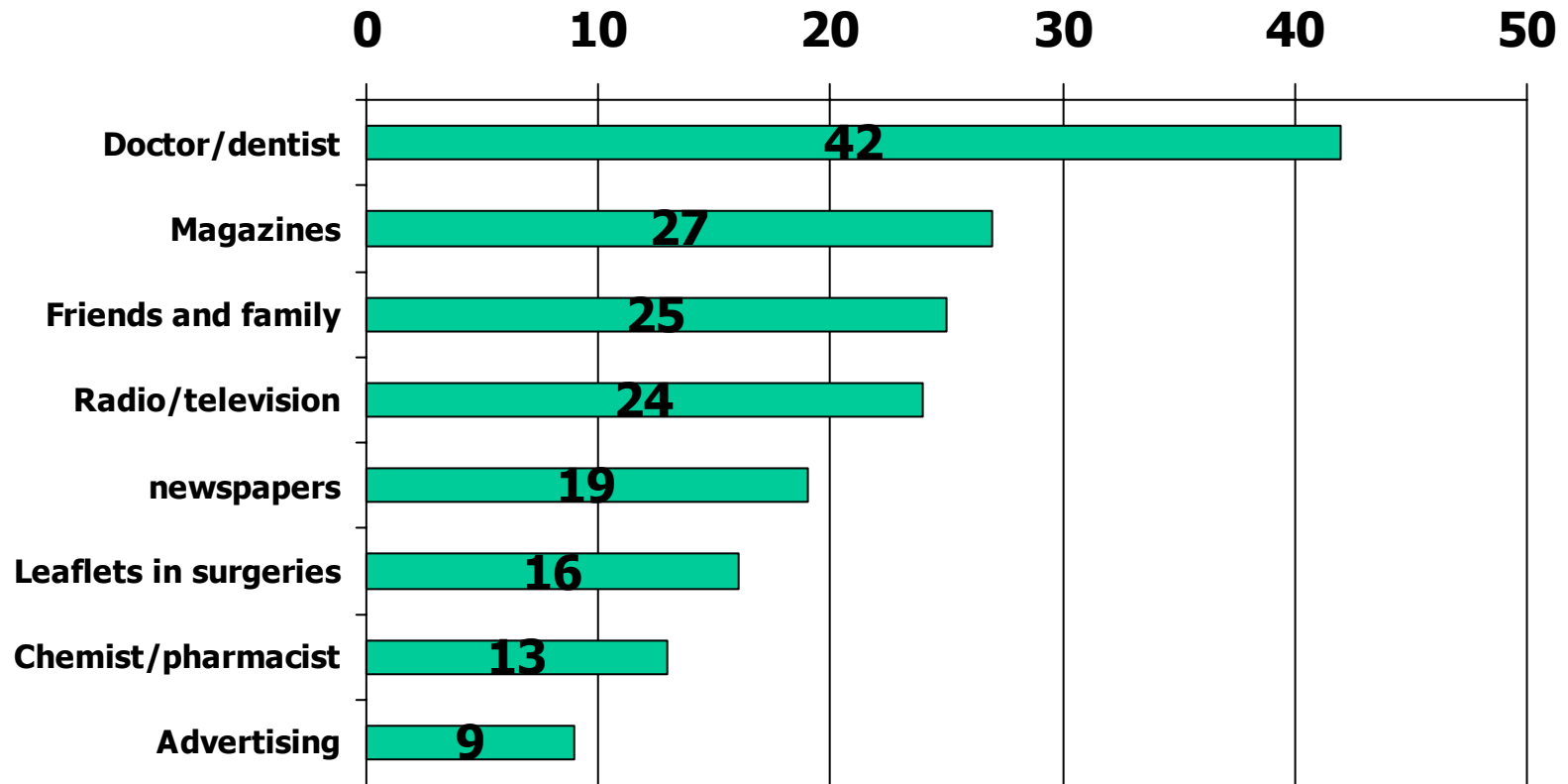
Other Attitudes to Health and Treatment



Actions taken for any problems experienced in last 12 months



Source of most information about health

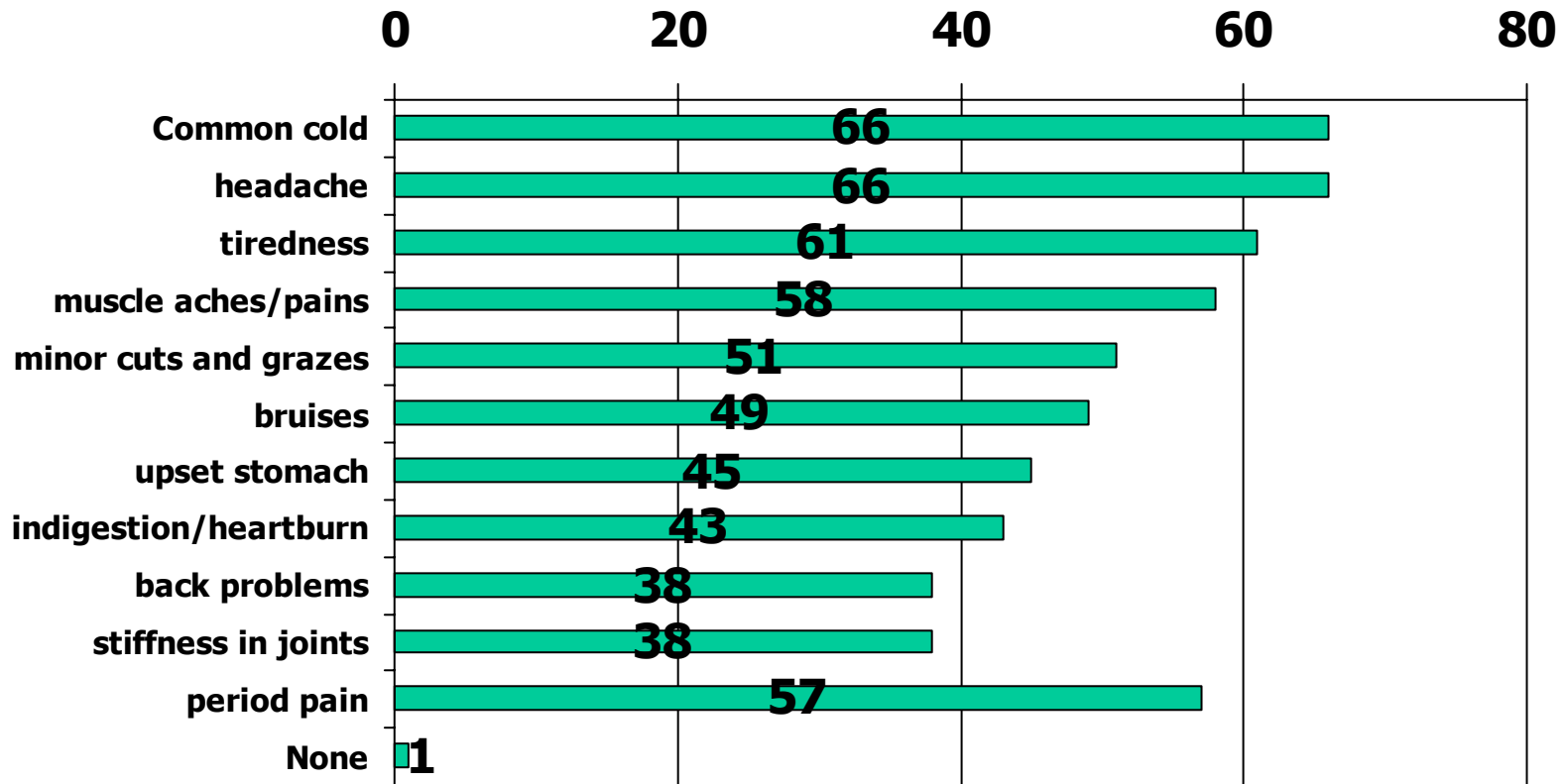


Incidence and Treatment of Ailments



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Most common ailments mentioned in last 12 months:Adults



Average number 14.1

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Other ailments widely mentioned for last 12 months: Adults

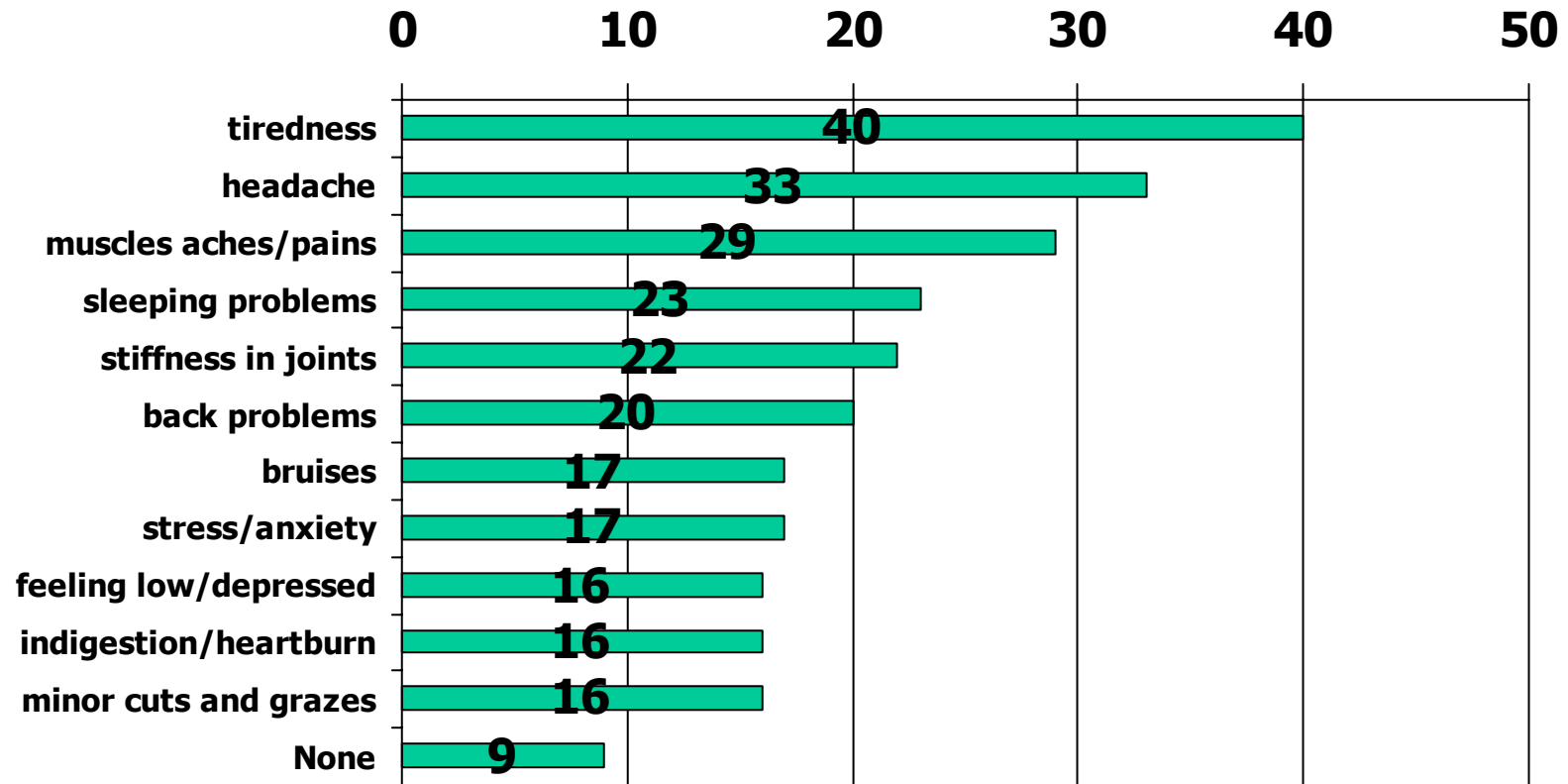
- Next tier of ailments all 'well being related:
 - feeling low 37%
 - sleeping problems 36%
 - stress 34%
- Others include:
 - hangover 33%
 - flu/virus 33%
 - pain from injury/strain 31%



Ailments with substantial increases in 12 incidence

| | | Comparison with 1986 |
|---------------------------|-----|-------------------------|
| • Sleeping problems | 36% | +10 |
| • stress | 34% | +10 |
| • lip problems/cold sores | 22% | +10 |
| • cough | 27% | +9 |
| • sickness/nausea | 28% | +6 |
| • diarrhoea | 25% | +6 |

Most common ailments mentioned in last 2 weeks:Adults



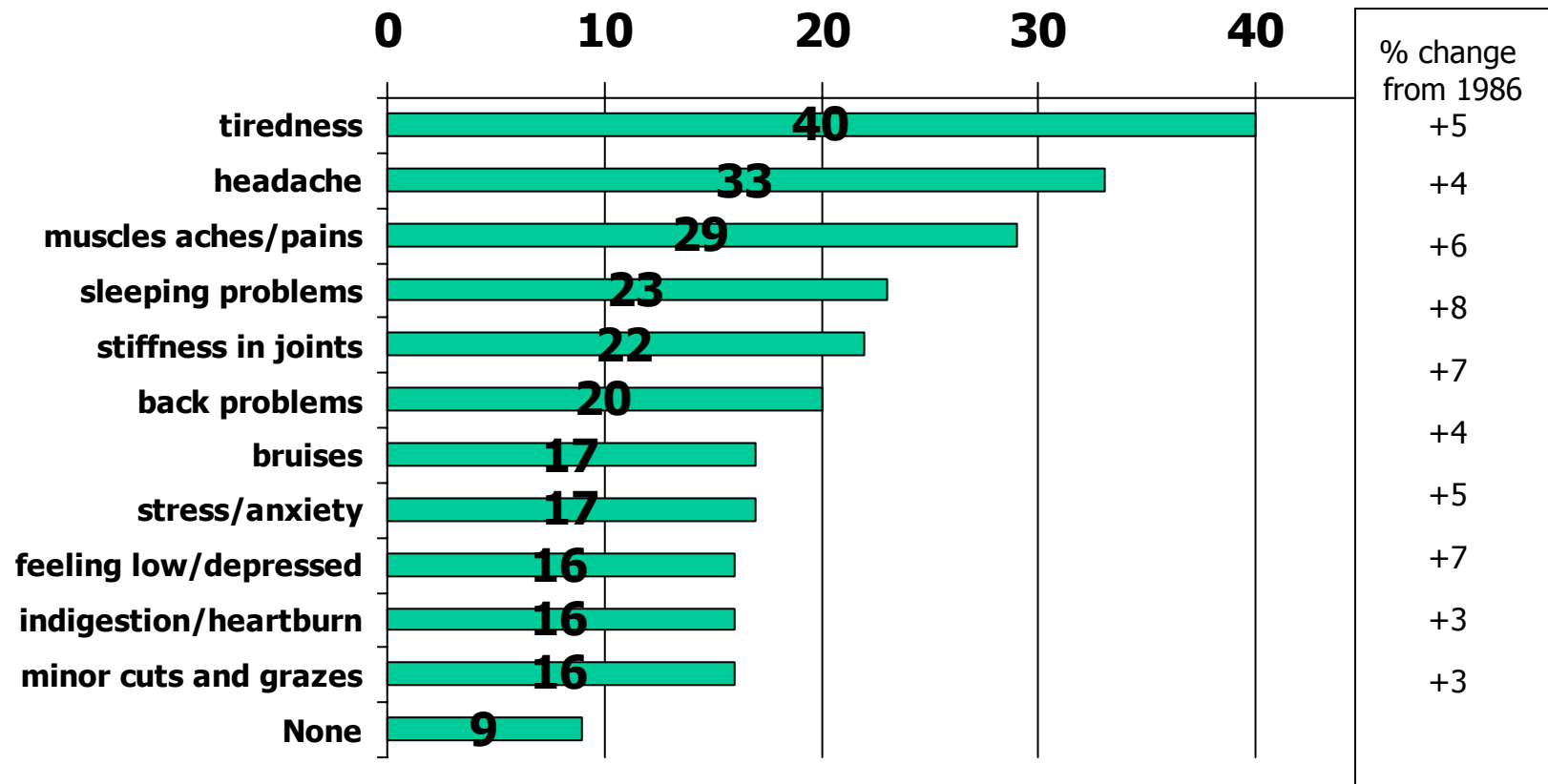
Average number 5.2

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Other ailments widely mentioned for last 2 weeks: adults

- Next tier
 - common cold 14%
 - arthritis 14%
 - hangover 12%
 - acne 12%

Most common ailments mentioned in last 2 weeks:Adults



Average number 5.2

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Incidence in last 2 weeks: other changes since 1986

- Top three ailments the same as 1986
- acne and colds have dropped out of top list; feeling low, stress and bruises have climbed into it
- other increases since 1986:

| | | |
|---------------------------|-----|----|
| – asthma | 6% | +4 |
| – eczema | 6% | +3 |
| – hayfever | 5% | +3 |
| – cough | 9% | +3 |
| – pain from injury/strain | 11% | +3 |

Ailments experienced in a group

- 5.2 ailments per adult in the last 2 weeks
- 59% of adults say some ailments are linked
- treating each group/un-grouped ailment as a case of sickness, average number of cases of sickness = 3.4 in last two weeks
- ailments most likely to be linked with others are well-being problems (stress, feeling low, sleeping); also PMT, then sinus problems, muscle aches, upset stomach and sickness.
- Least likely are athlete's foot, bunions and thinning



hair

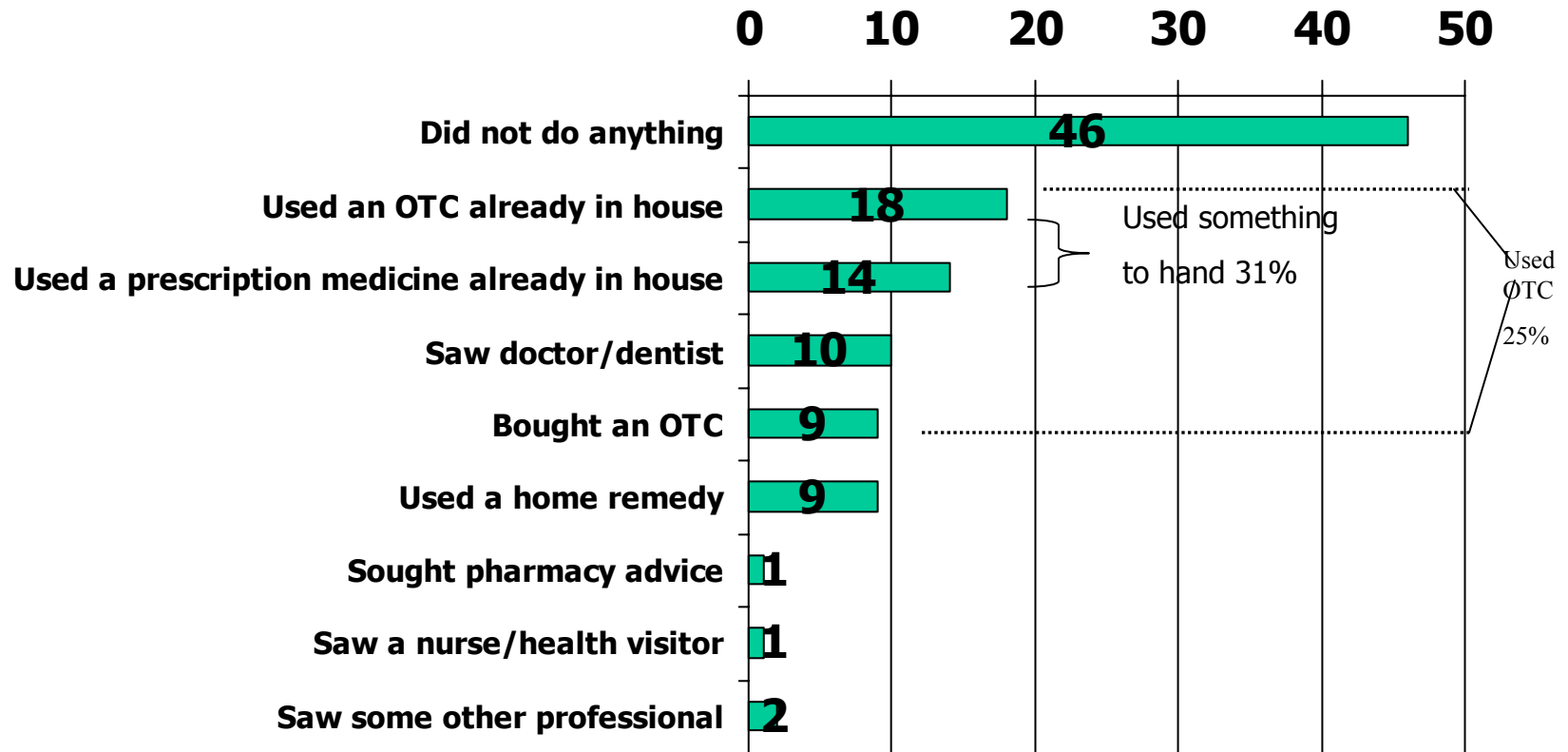
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'Tiredness'

- 40% of adults had suffered 'tiredness' in last 2 weeks
- 66% of tiredness ailments were linked with other problems
- of those not linked, only 3% were serious enough to be taken to the doctor
- tiredness is most commonly experienced with sleeping problems, stress/anxiety, feeling low/depressed, headaches
- at lower levels, but above average association with acne and sickness/nausea



All things done in last 2 weeks

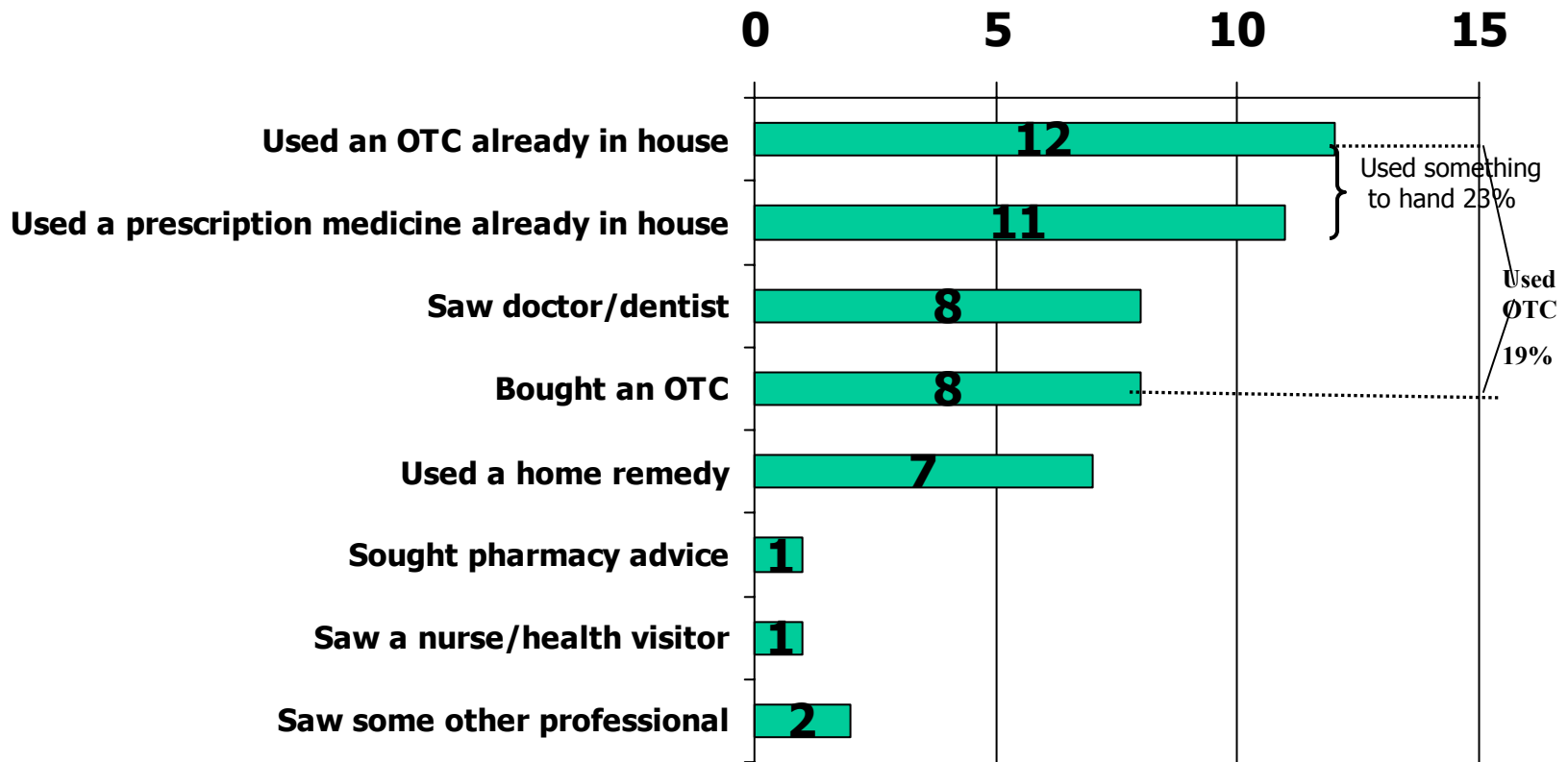


Base: all ailments experienced in last 2 weeks (9032)



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All things done in last 2 weeks: based on adults



Did not use anything on some occasions 56%

Did not use anything on any occasion 48%



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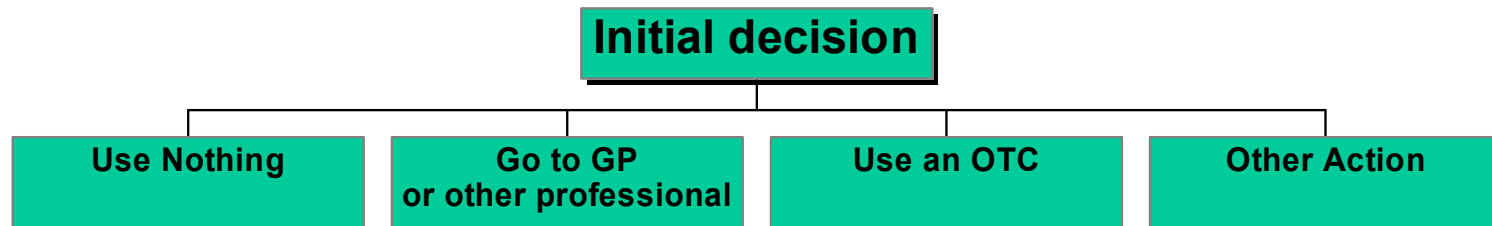
Sequence of actions

- Treatment used at first is likely to be continued
- exception is doctor's visit, where subsequent action may well be using a prescription, or revisiting
- if OTC used at first, likely to continue with OTC?buy more: 77% of those using at first, continued to use
- 96% of those using nothing at first, continue to use nothing

Actions taken: ailment experienced before/new

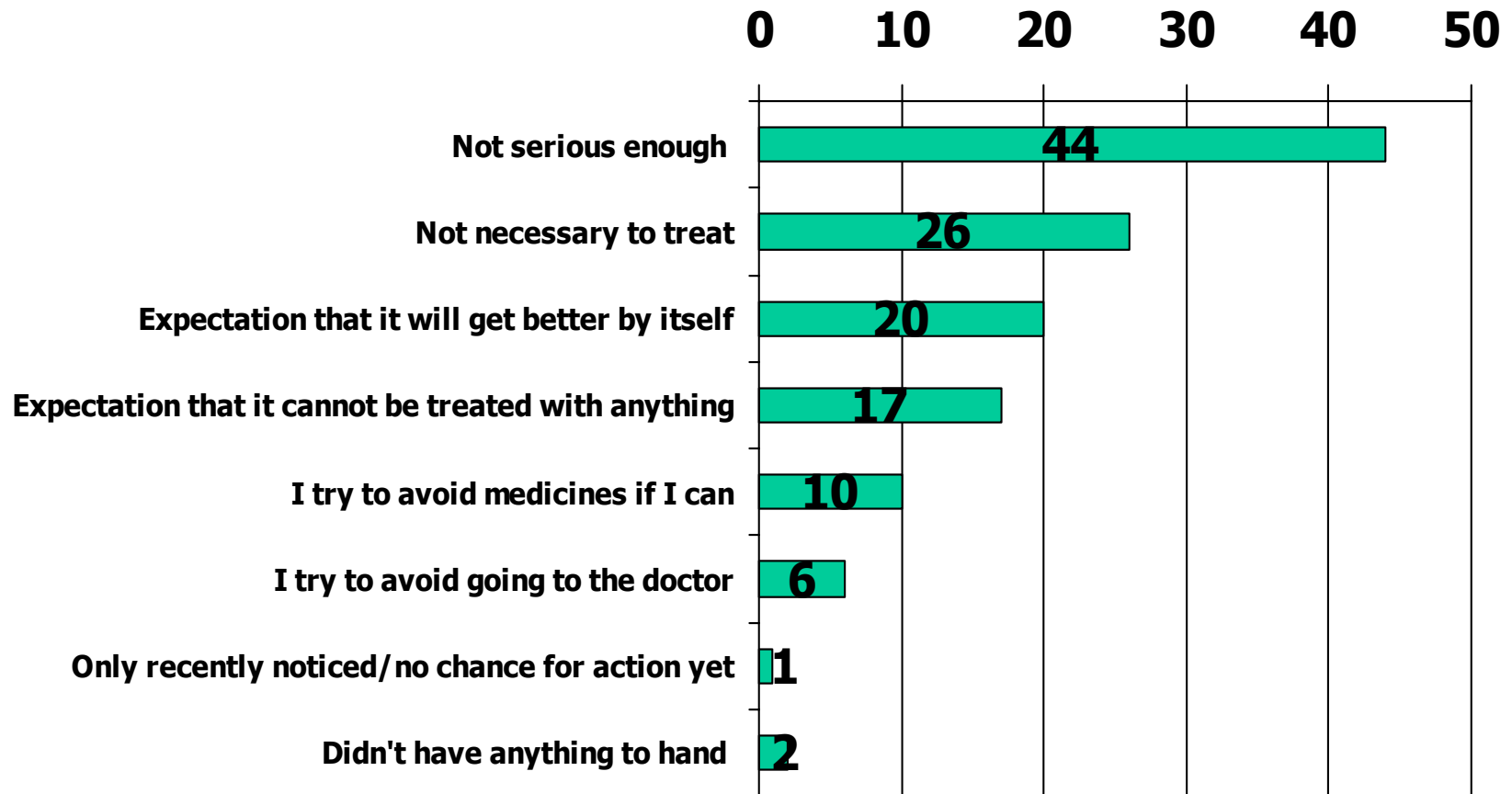
- 93% of ailments have been experienced before
- if ailment has been suffered before, it is less likely to be treated than a new ailment
- if it is treated it is likely that OTC/prescription medicine already to hand will be used
- if it is a new ailment, it is more likely that advice will be sought -primarily from a doctor

Decision/Action Path where ailment experienced before:



- C.75% of initial actions are repeated or directly related to initial action
- potential OTC growth from moving initial action to OTC use from using nothing or visiting doctor

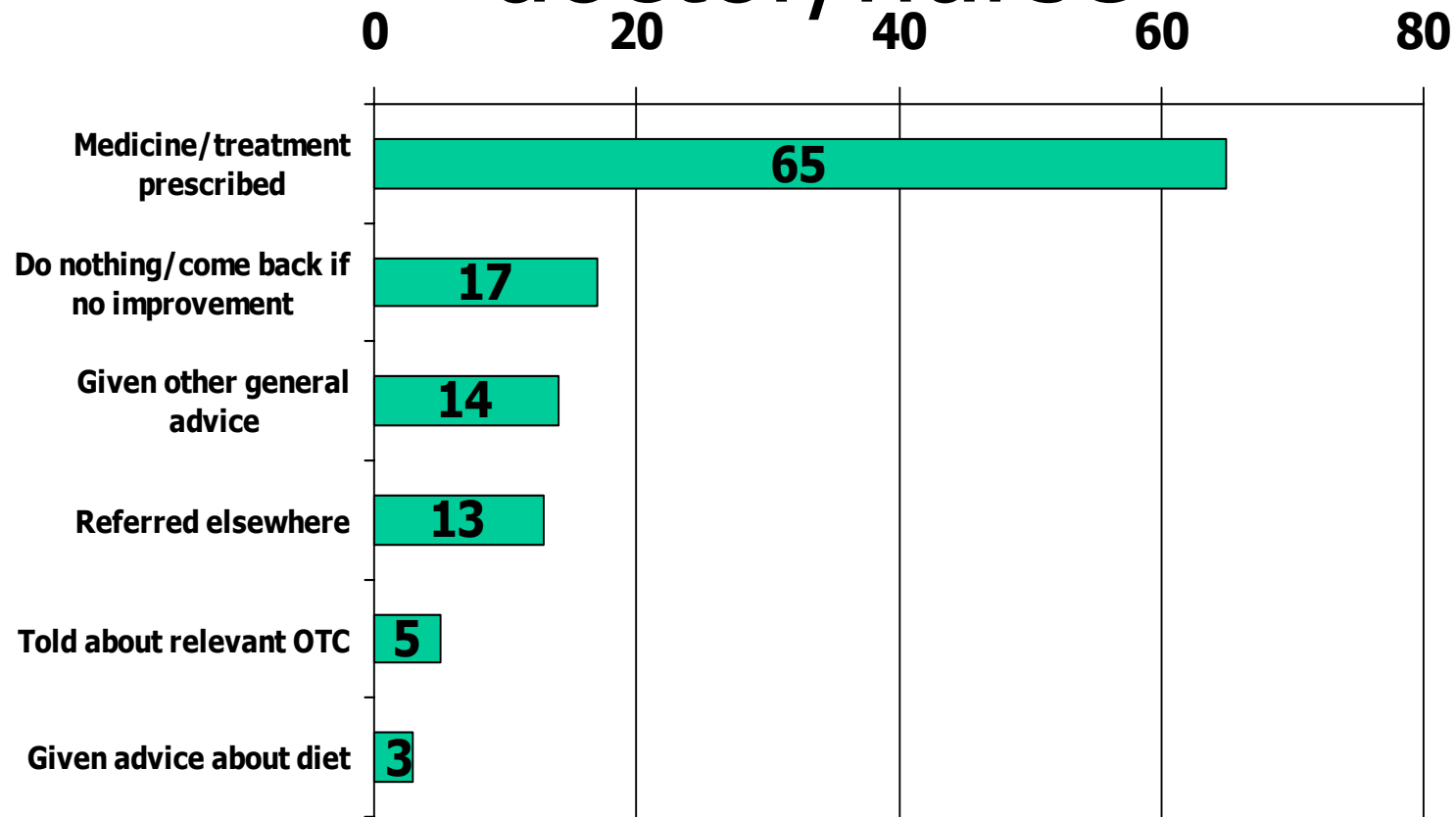
Reason for not using anything



All untreated ailments (4034)

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Outcome of consultation with doctor/nurse

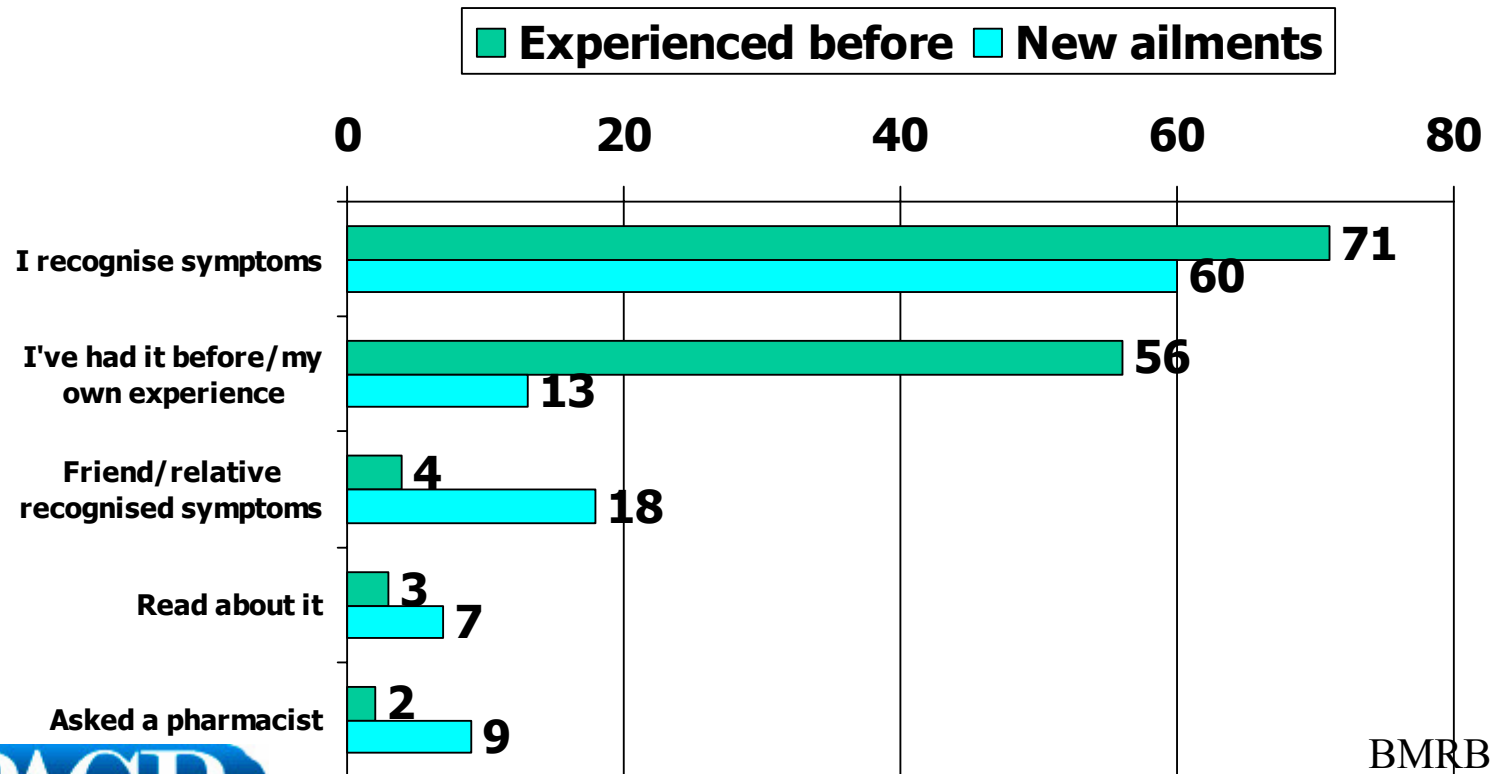


Consultation resulting in no drug treatment (prescription or OTC) 29%

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Justification for self-medication

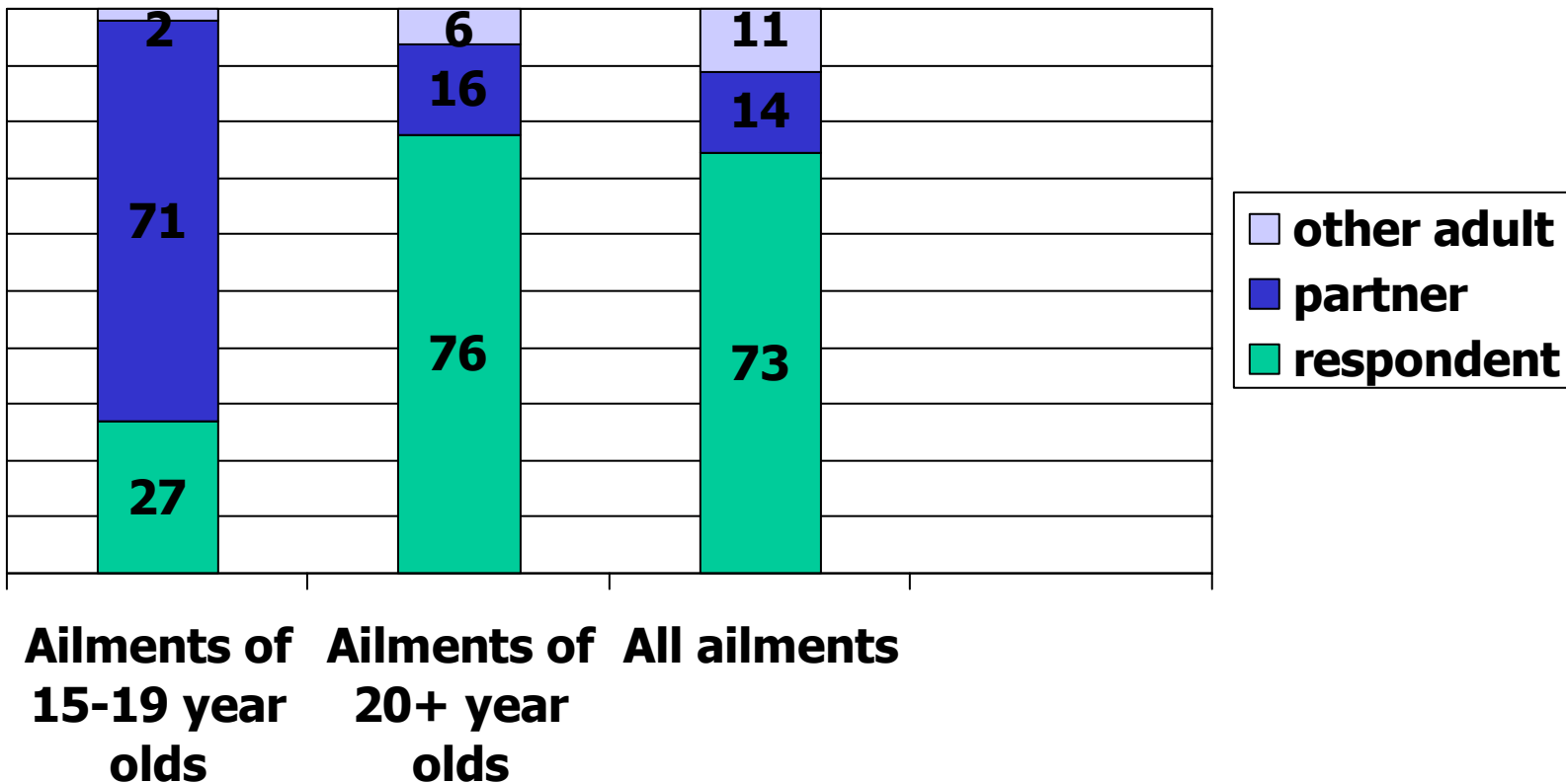
- 31% of ailments treated with medicine without reference to doctor
- Question: How did you know how to treat?



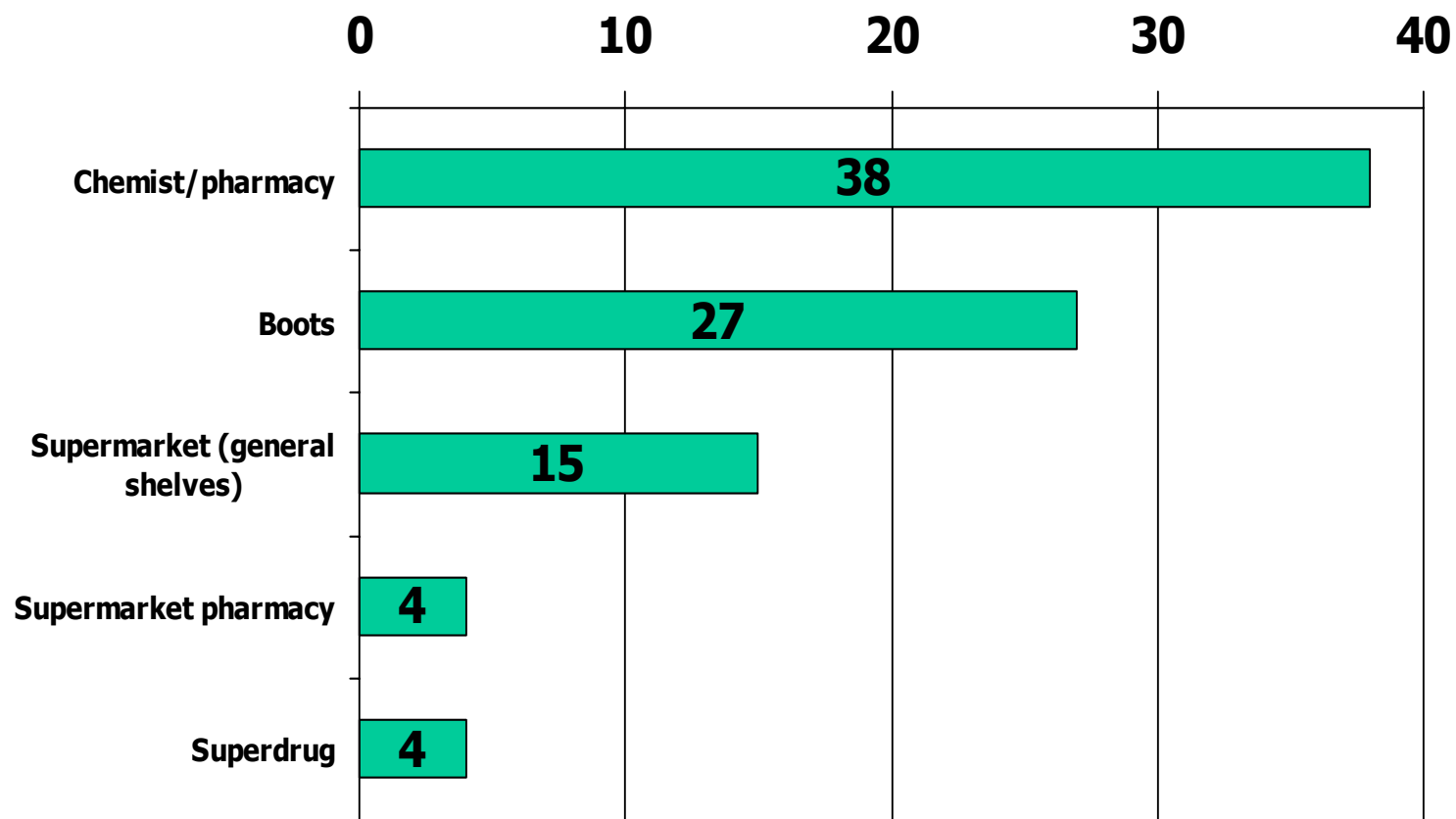
Use of OTC medicines



Purchaser of OTCs already in House



Where OTC Bought



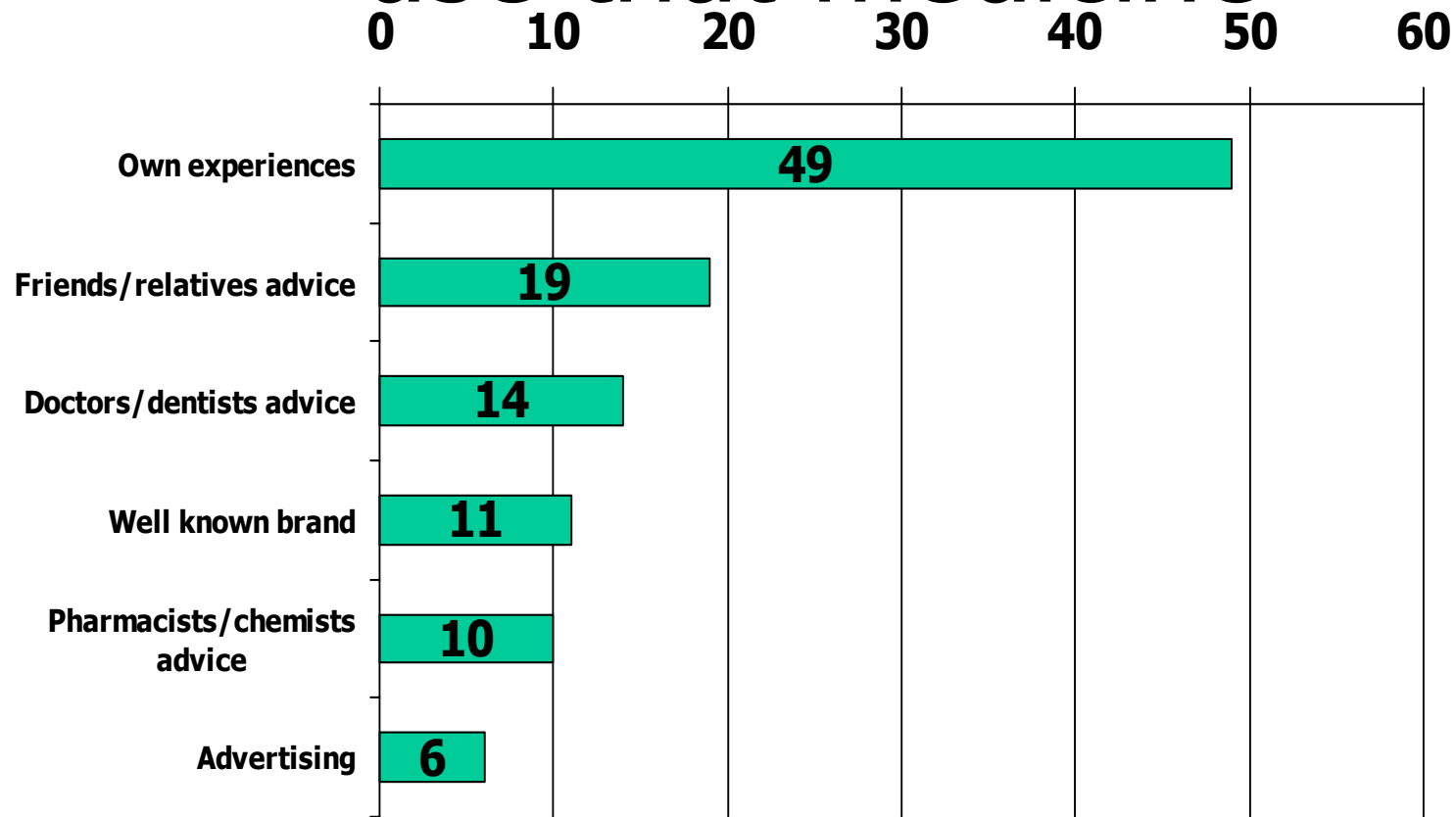
Consultation resulting in no drug treatment (prescription or OTC) 29%

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Why Chose type of shop



Factors affecting decision to use that medicine

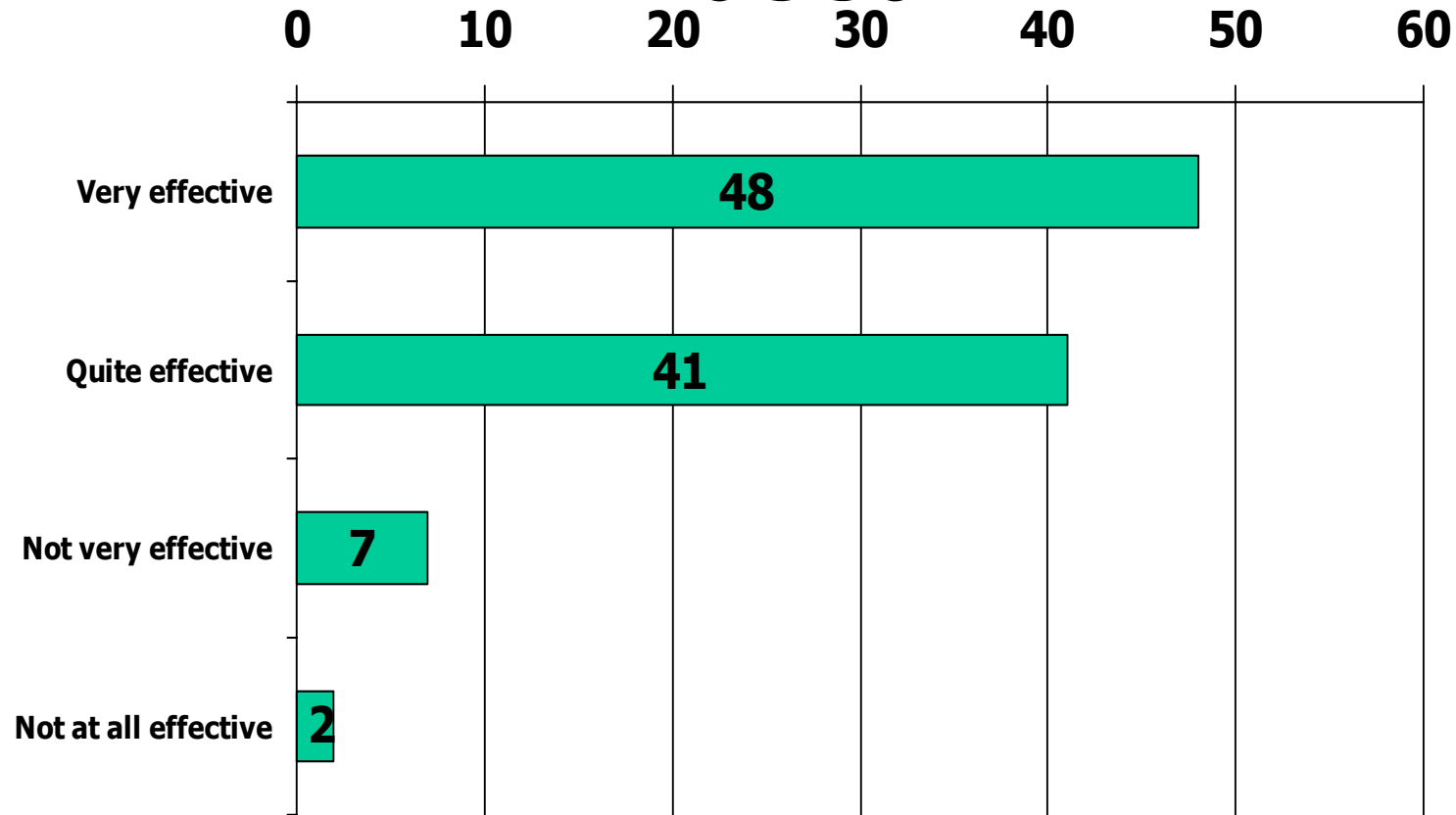


Length of using/reasons for stopping

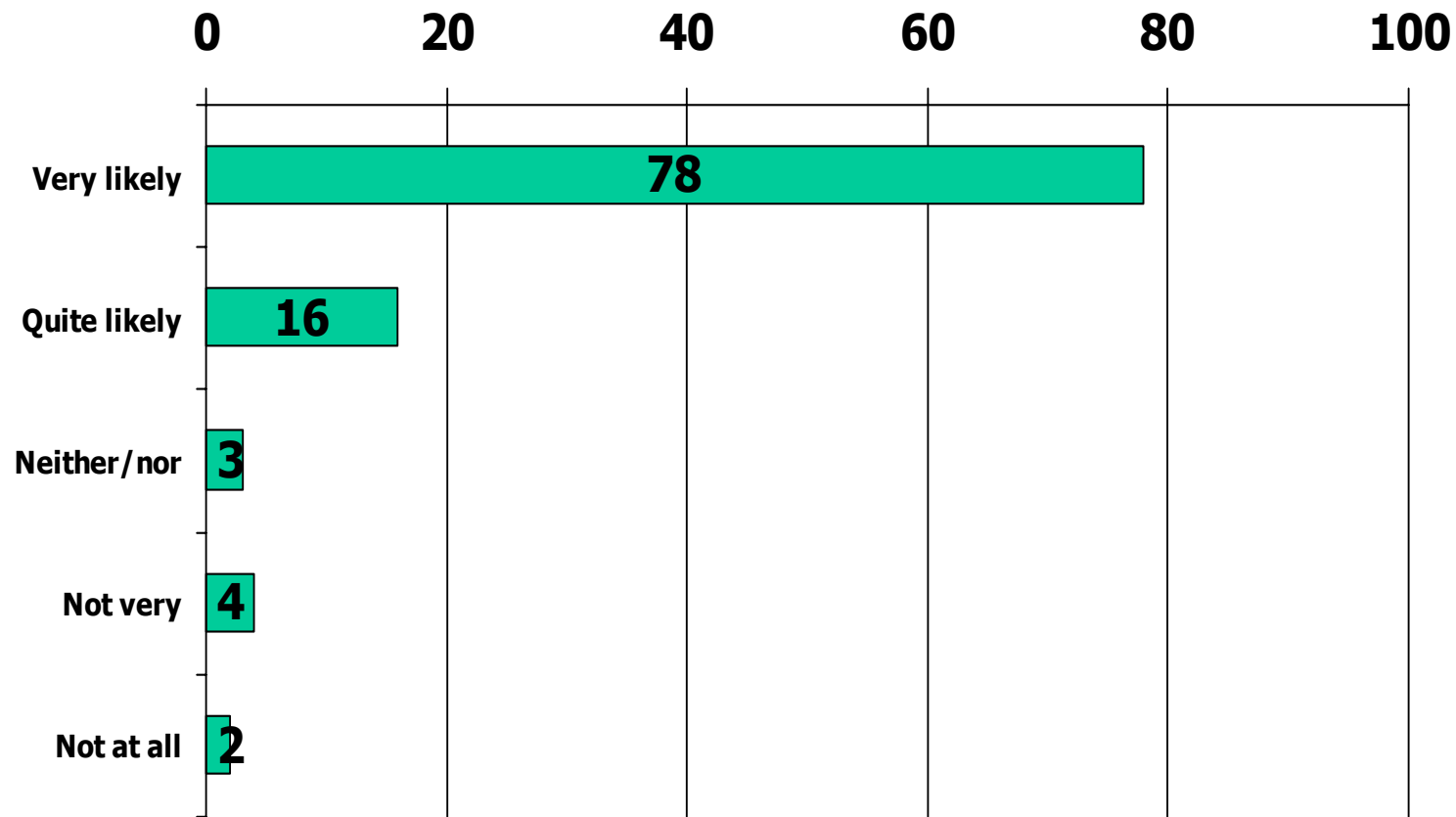
- Average number of OTCs used = 1.14
- Almost two thirds of OTCs (64%) used for a day or two or less, 24% used only once
- By far most common reason for stopping was improvement:
 - problem got better (81%)
 - only taken when really bad (11%)
- Product not working is a very small problem
 - product didn't work 4%
 - getting no better/went to doctor 1%
 - switched product 1%



Effectiveness of medicines used



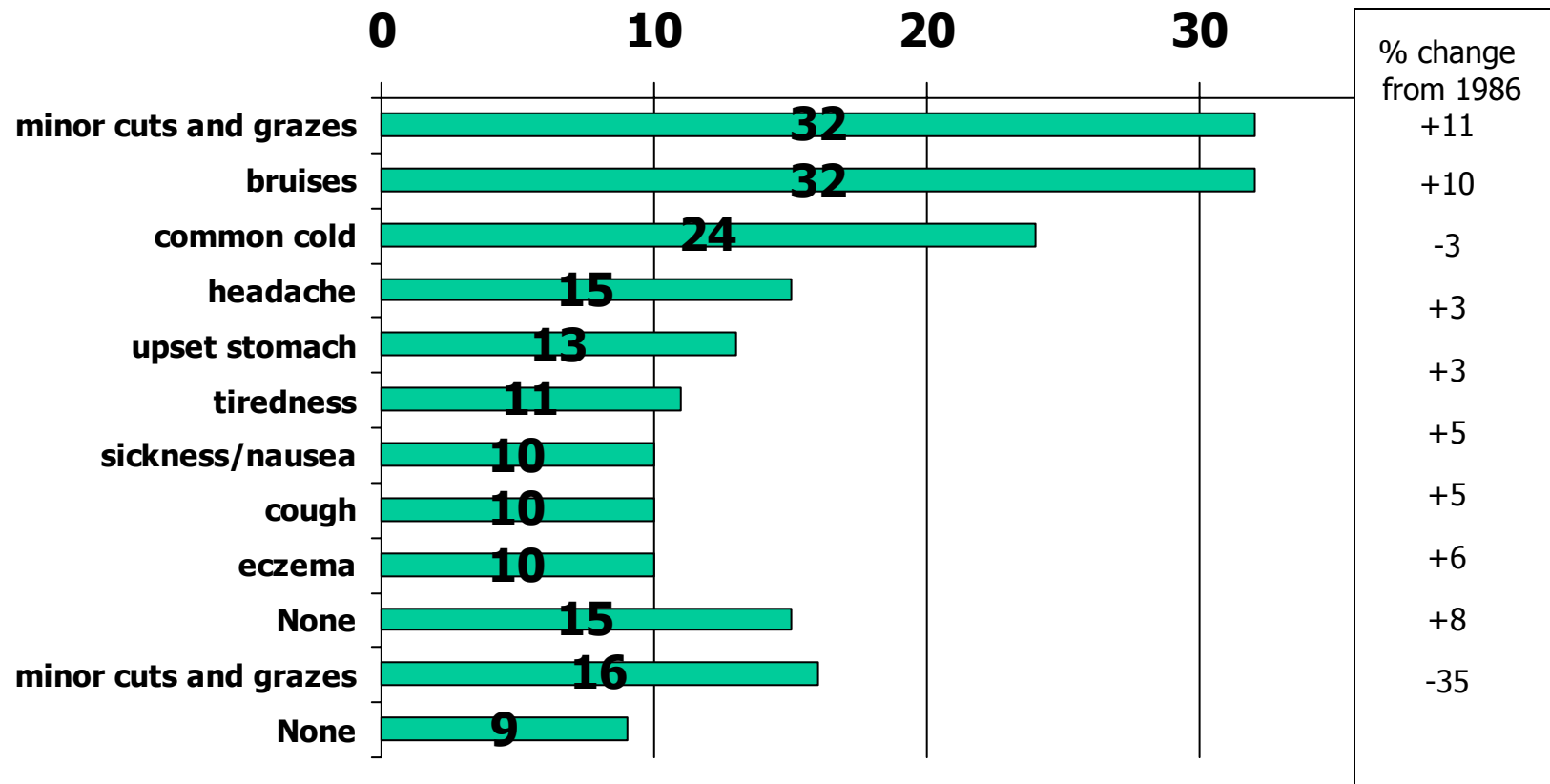
Likelihood of using OTC again



Children's ailments: Treatment and OTC use



Most common ailments mentioned in last 2 weeks: children



Average number 3.00

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Comparison of Adult and Child Treatment

- As in 1986, more likely that something will be used for children's ailments than adults
- and more likely to use an OTC already in house
- No longer the case that children's ailments are more likely to be taken to the doctor than adult ailments, or that an OTC more likely to be bought for child ailment



Reasons for using nothing:adults v children

- More willingness to use treatments for child ailments, but when untreated.....
- Child ailments more likely to be considered:
 - not serious enough
 - not necessary to treat
- Less likely:
 - expectation it can't be treated
 - try to avoid medicines if I can

Outcome of doctor consultations: adult v children

- As for adult ailments, two thirds result in prescription
- child ailments twice as likely as adult to be told 'do nothing/come back if no improvement' (32% of child ailments v 17% of adults ailments)
- no consultation for child ailment resulted in OTC recommendation (v. 5% of adult ailments)

OTC Experience: adult v child ailments

- Remedies for child ailments more likely to come from chemist/pharmacies
- 20% of OTCs for child ailments influenced by pharmacist (adult OTCs 10%); health visitor/nurse also more influential
- OTCs used for child ailments used for shorter duration and problem even more likely to have got better than those for adults
- OTCs for child ailments perceived as even more effective and more likely to be used again than those for adults



Conclusions

- No major changes since 1986
- indications of more awareness of, and anxiety about health
- rather more confidence about self treating
- self treatment sensibly carried out