

Adolescent OTC Drug Product Use: A Public Workshop

December 6 & 7, 2007

NIH Natcher Conference Center, Bethesda MD



Presented by:

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Agenda

- ▶ **Overview of IRI Panel**
- ▶ **Survey Collection Methodology**
- ▶ **Household Survey Data by Category**
 - Acne Products
 - Allergy Product
 - Internal Analgesics
 - Menstrual Pain Product
- ▶ **Summary & Conclusions**

IRI's Panel Database

Integrates key datasets at the household level



Methodology: IRI's Individual User Survey

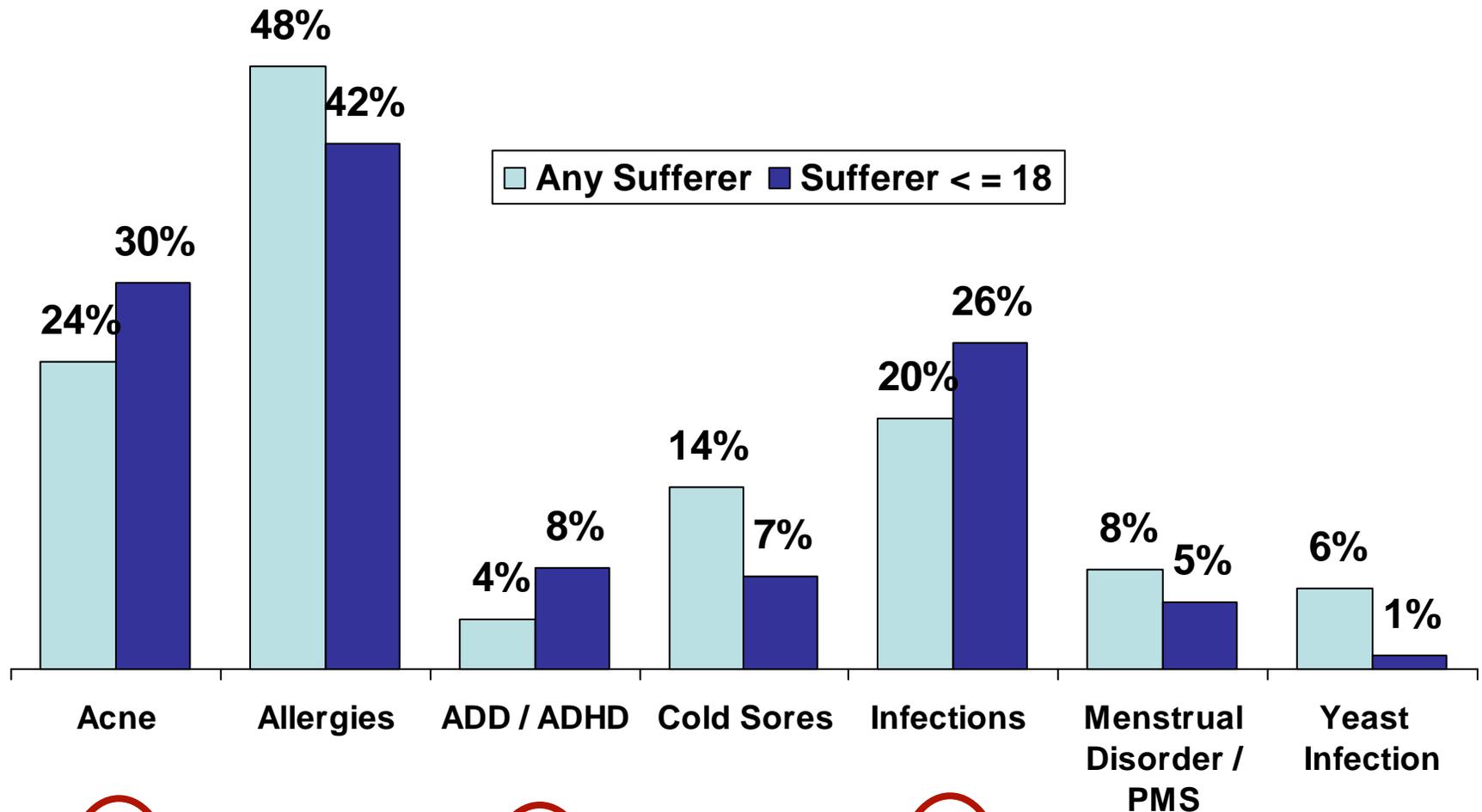
Provides usage information by household member

- ▶ Each member of the household is listed by gender and age
- ▶ For each member, how much of the product did they use:
 - A Little
 - Some
 - Most
 - All

		COLD/ALLRGY/SINUS LIQ MOTRIN				COLD/ALLRGY/SINUS LIQ TYLENOL FLU			
		A Little	Some	Most	All	A Little	Some	Most	All
Male	40	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Female	37	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Female	18	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Female	14	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Condition Incidence: Teens vs. General Population

Teens more likely to suffer from Acne and Infections than general population



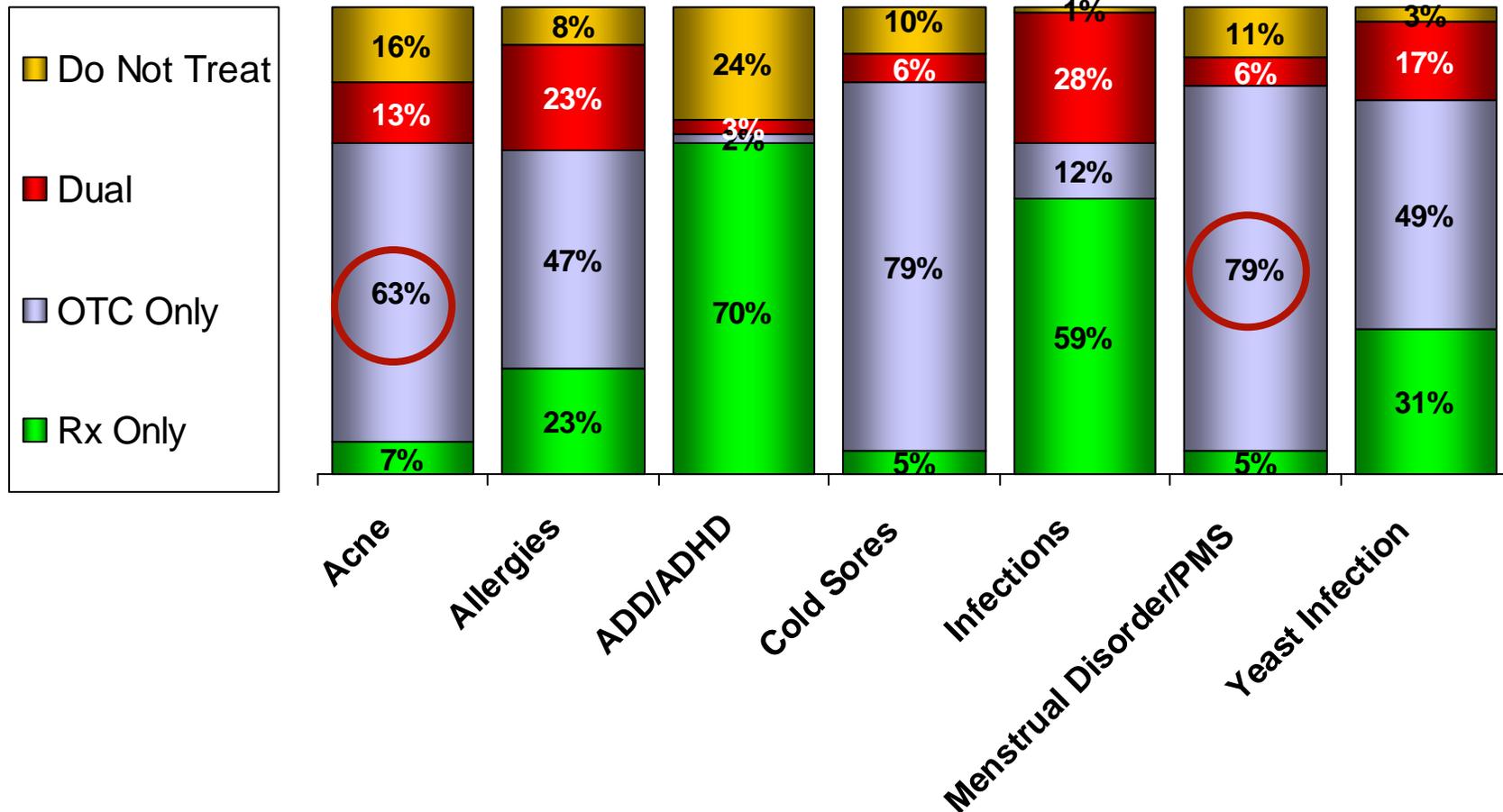
Index:	125	88	200	50	130	17
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Sources: IRI MedProfiler VI Survey

63

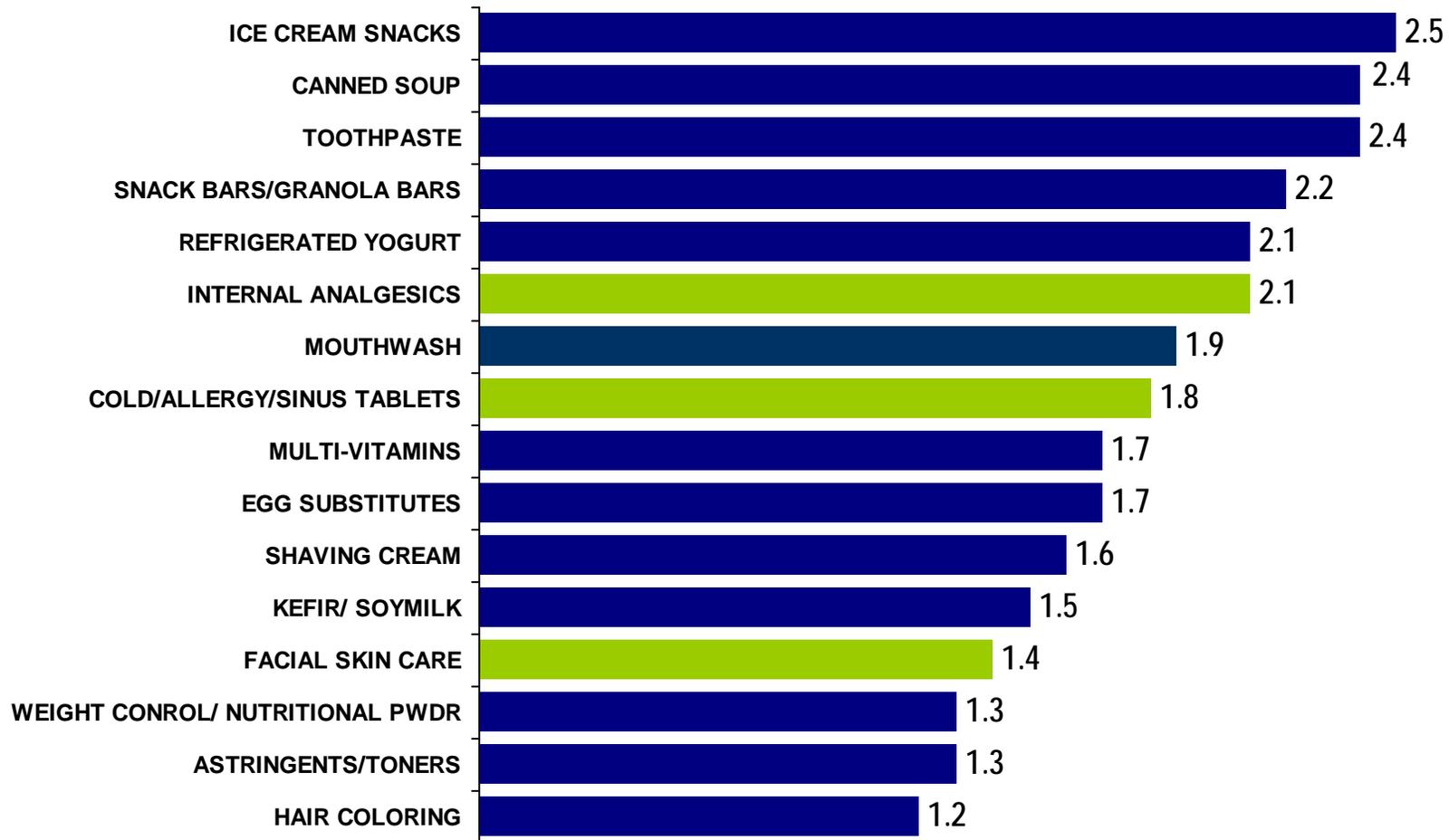
Condition Treatment Choices for Individuals ≤18

Acne and Menstrual Disorders are typically treated with OTC products; dual Rx/OTC treatments most common among Allergy and Infections.



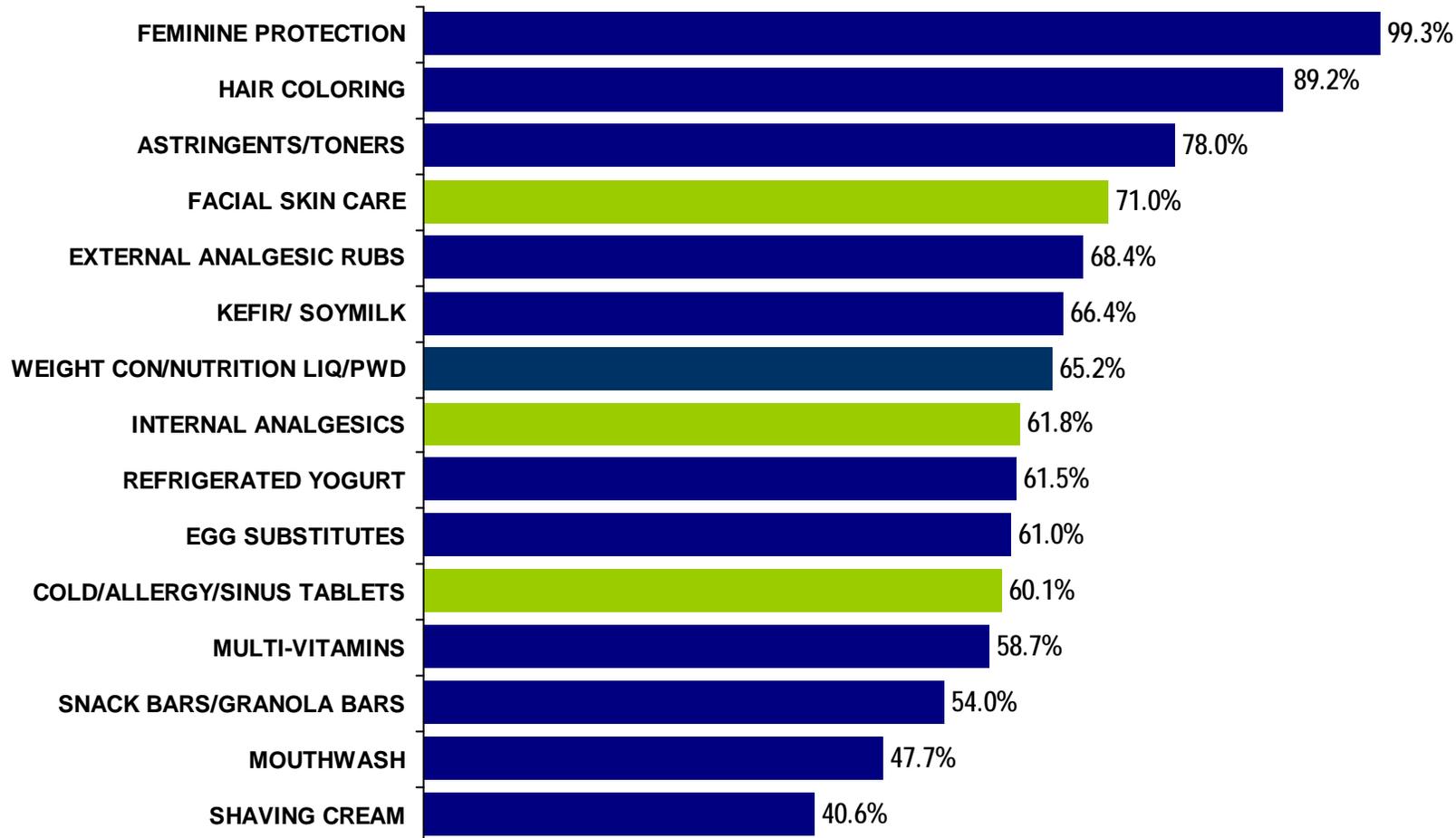
Sources: IRI MedProfiler VI Survey

Average Number of Category Users per Household (Across All Age Groups; US National Average = 2.3)



Time Period = Various '02-'05

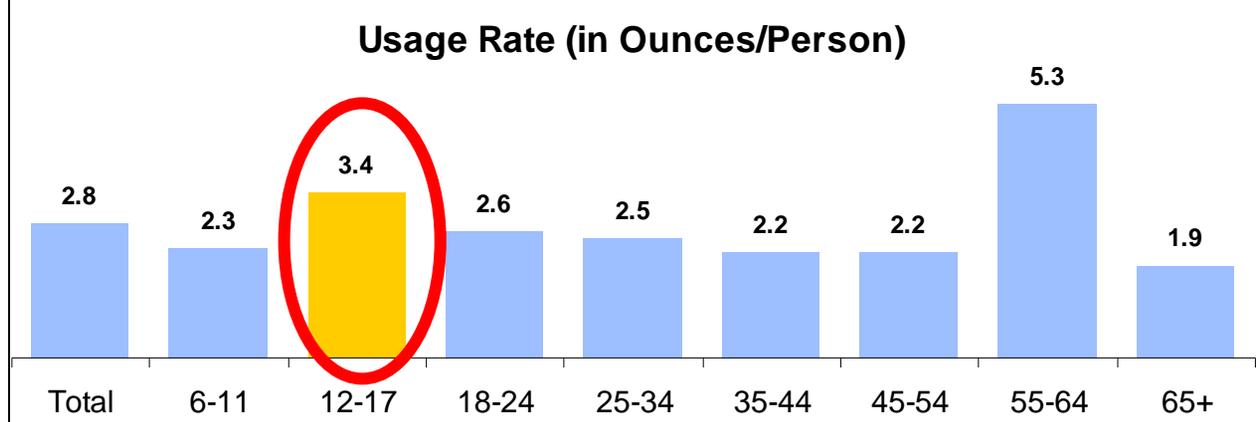
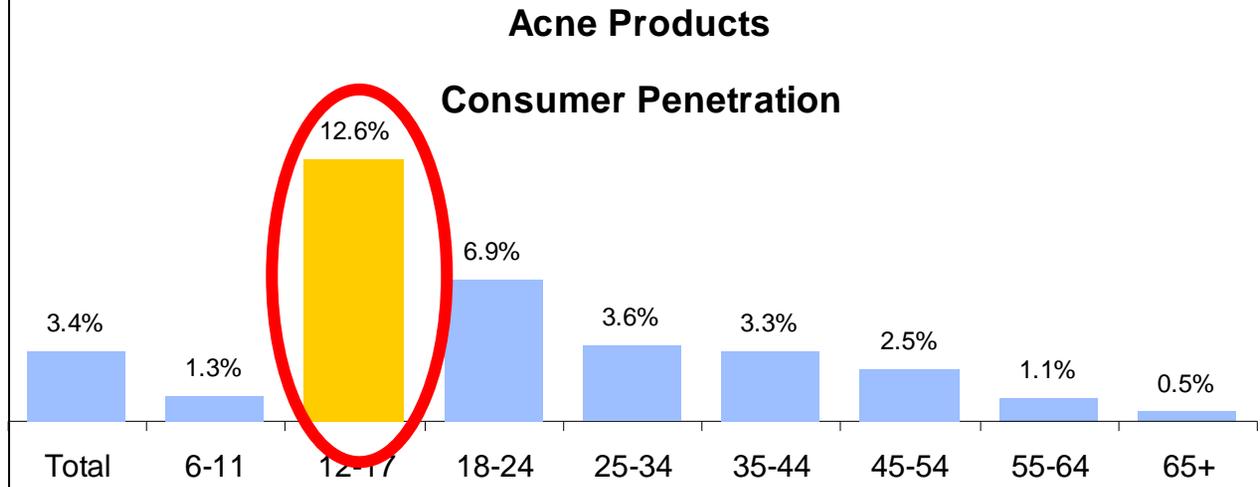
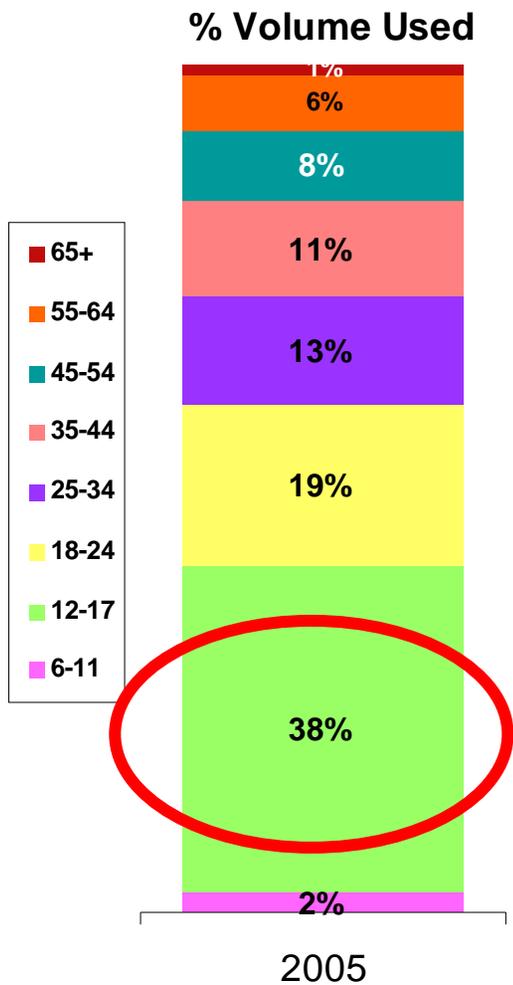
Category Norms: % Category Volume Accounted for by Females (Across All Age Groups)



Time Period = Various '02-'05

Acne Products - Usage Dynamics by Age

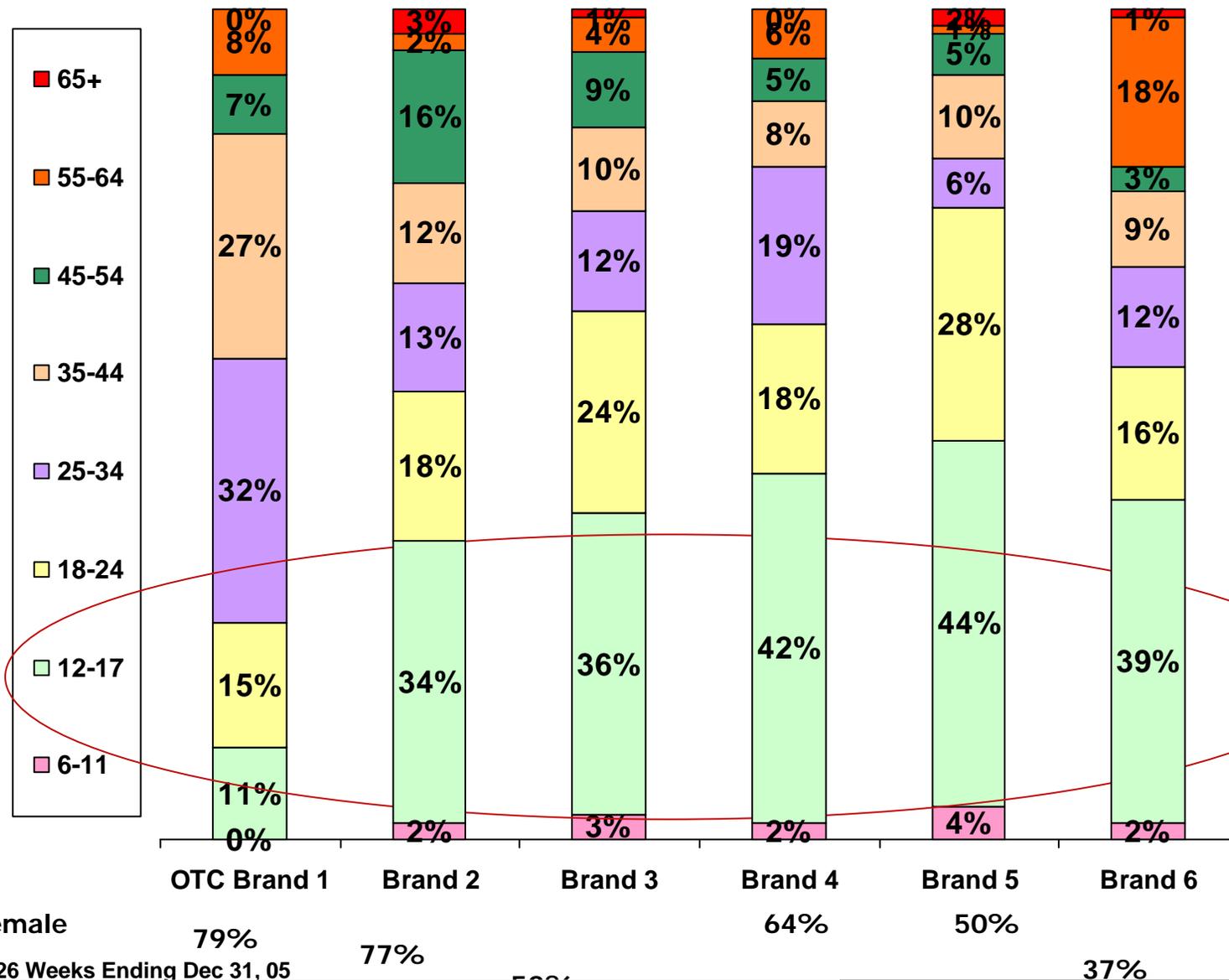
38% of Acne Product volume comes from consumers aged 12-17. Penetration rates are highest among this group; usage rates are second highest.



Time Period: 26 Weeks Ending Dec 31, 2005

Branded Acne Products: Distribution of Vol by Age/Gender

Heavily reliant on the under-18 female consumer

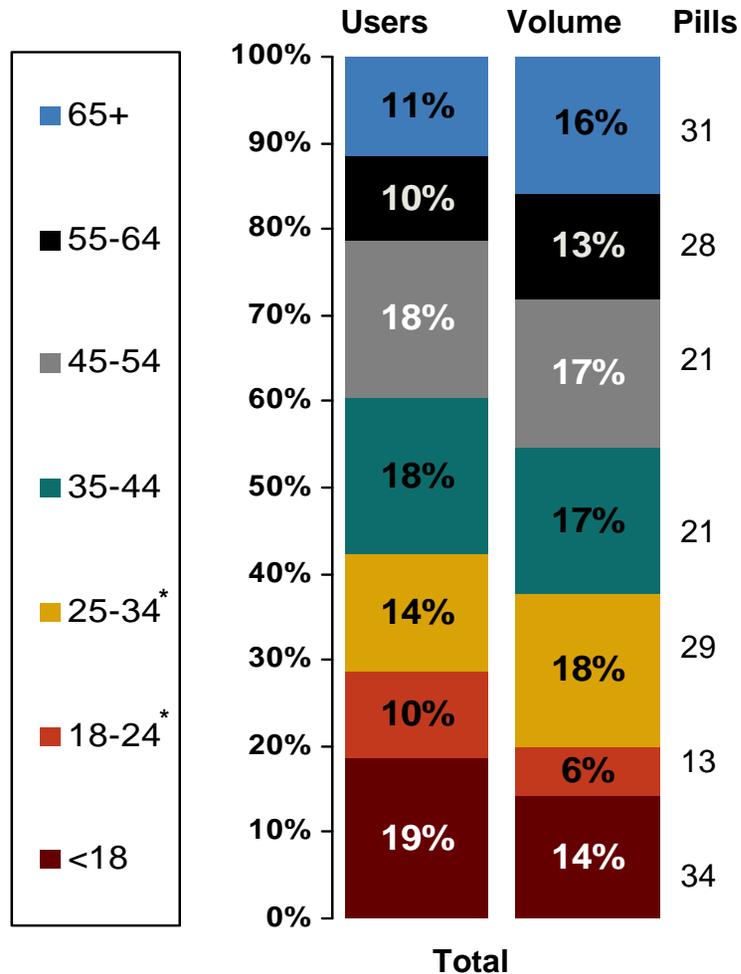


Time Period - 26 Weeks Ending Dec 31, 05

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Branded Allergy Remedy - % of Users/Volume by Age/Gender

Males <18 represent the single largest user group for Claritin.

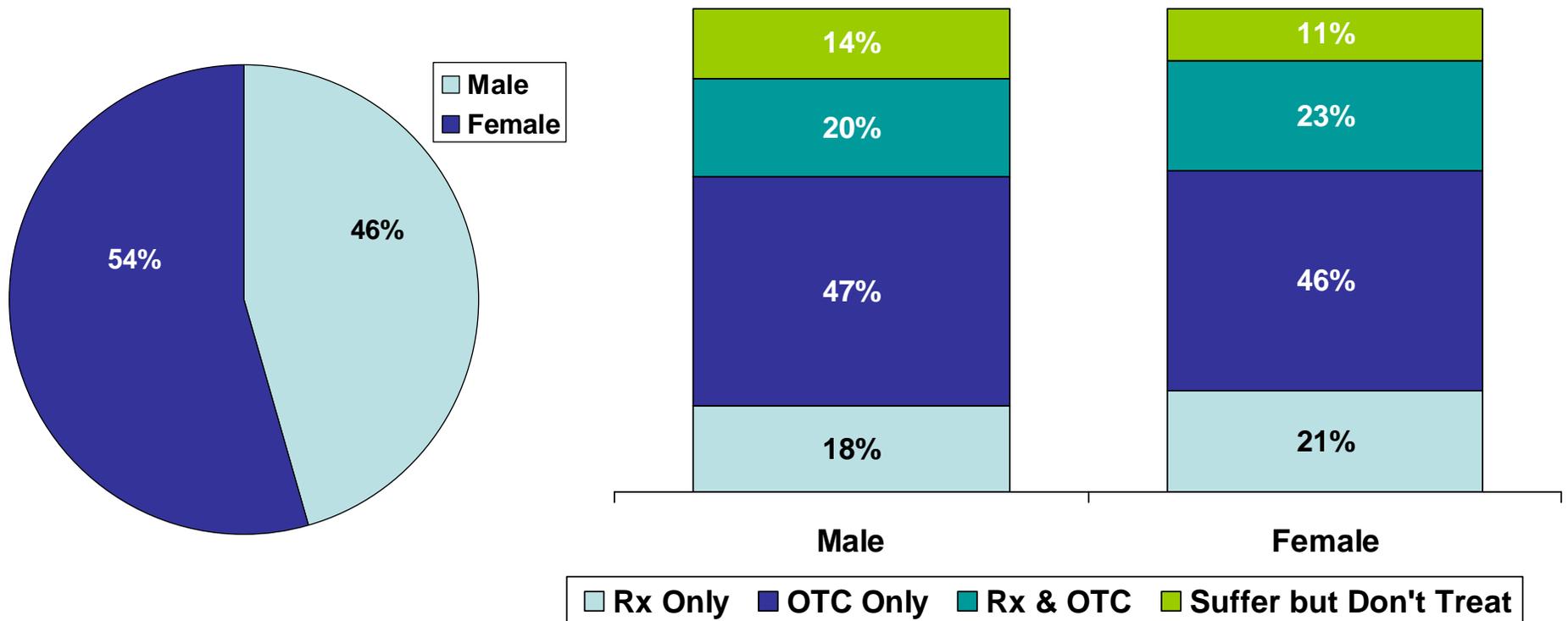


Time Period = 26 Weeks Ending 06/27/2004

* Small sample size

Allergy Products: Treatment Choice by Gender

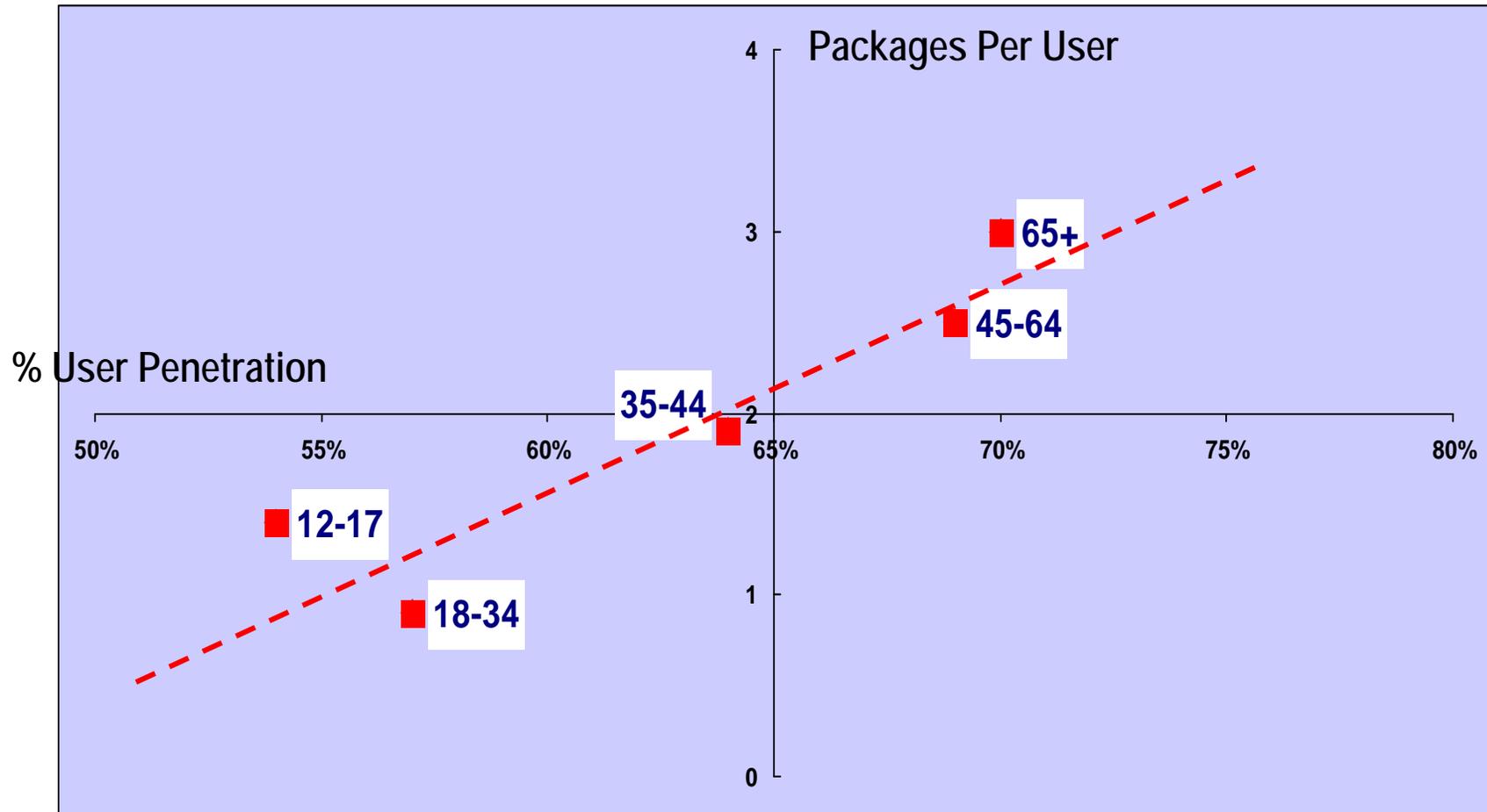
Women report at a slightly higher incidence level than men; however, treatment options are similar between the sexes.



Sources: IRI MedProfiler VI Survey

Internal Analgesics: As consumers age, usage increases.

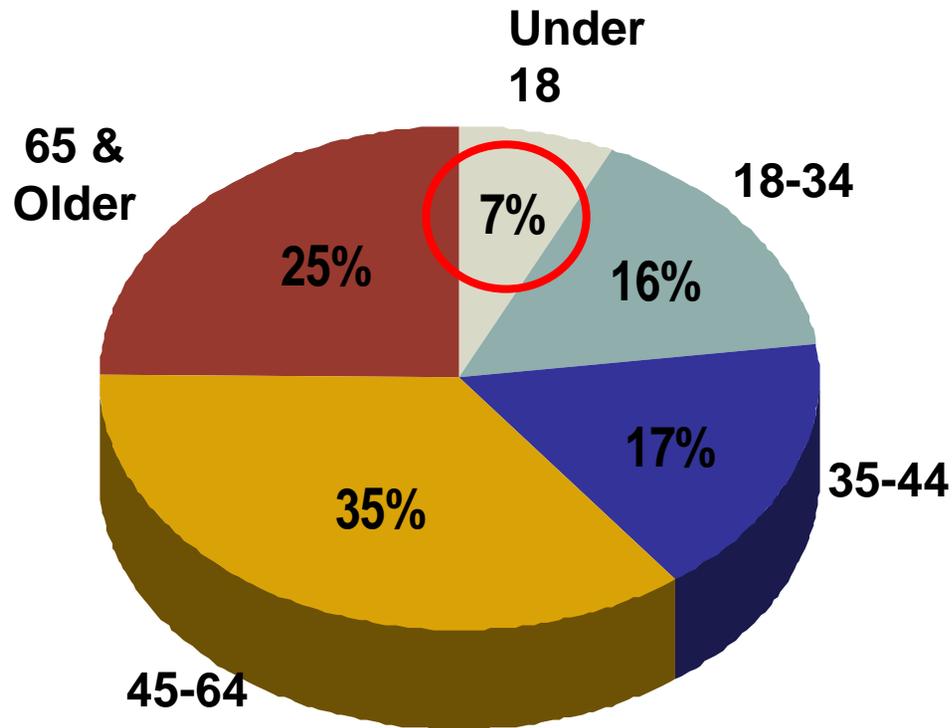
Category Usage Dynamics by Age



Time Period - 52 Weeks Ending 9/15/02

Internal Analgesics Category: Only 7% of packages used by consumers <18.

IA Category % Packages Used by Age



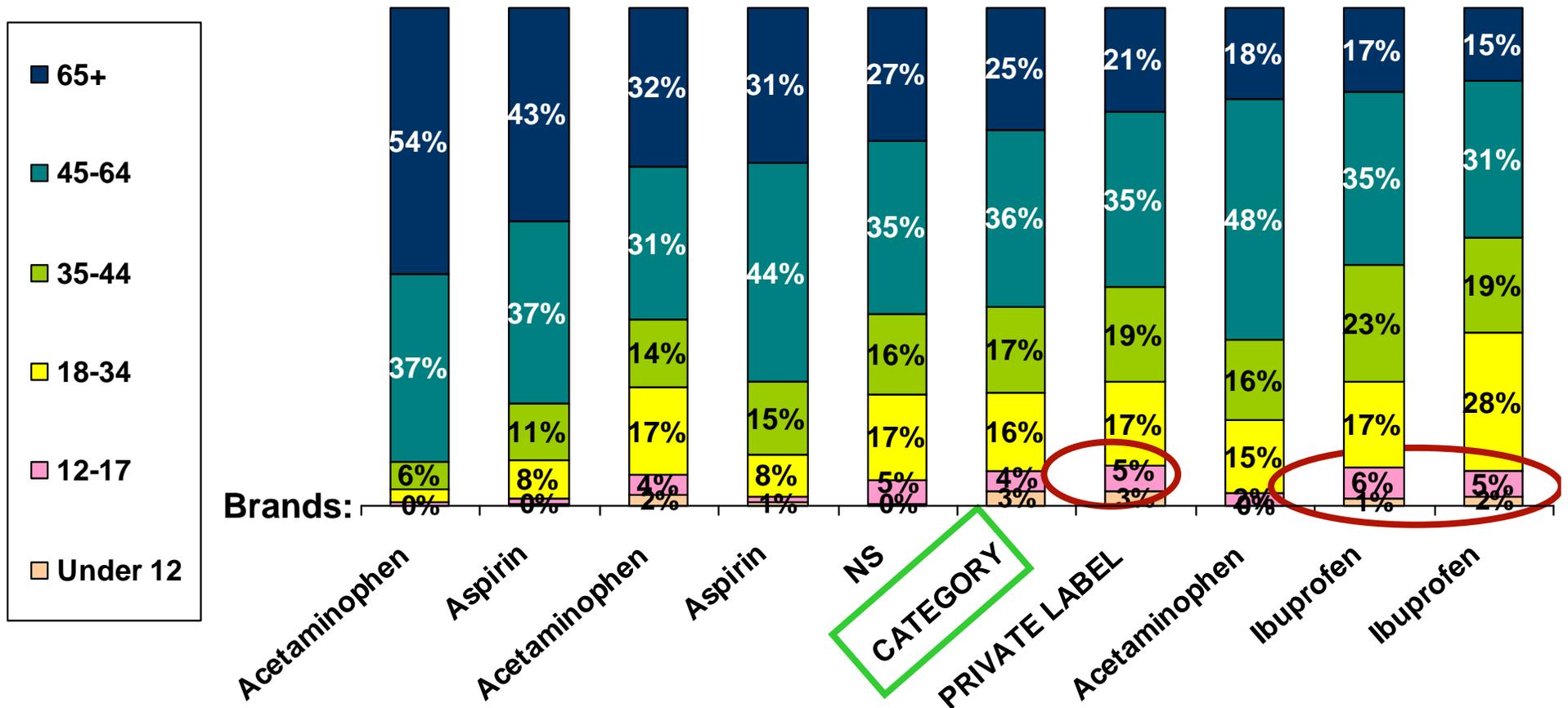
US Population Comparisons

	Census	Index
<18	25%	28
18-44	38%	87
45-64	24%	146
65+	13%	192

Internal Analgesics Brands: Distribution by Age

Private Label and Ibuprofen brands have the youngest user profiles

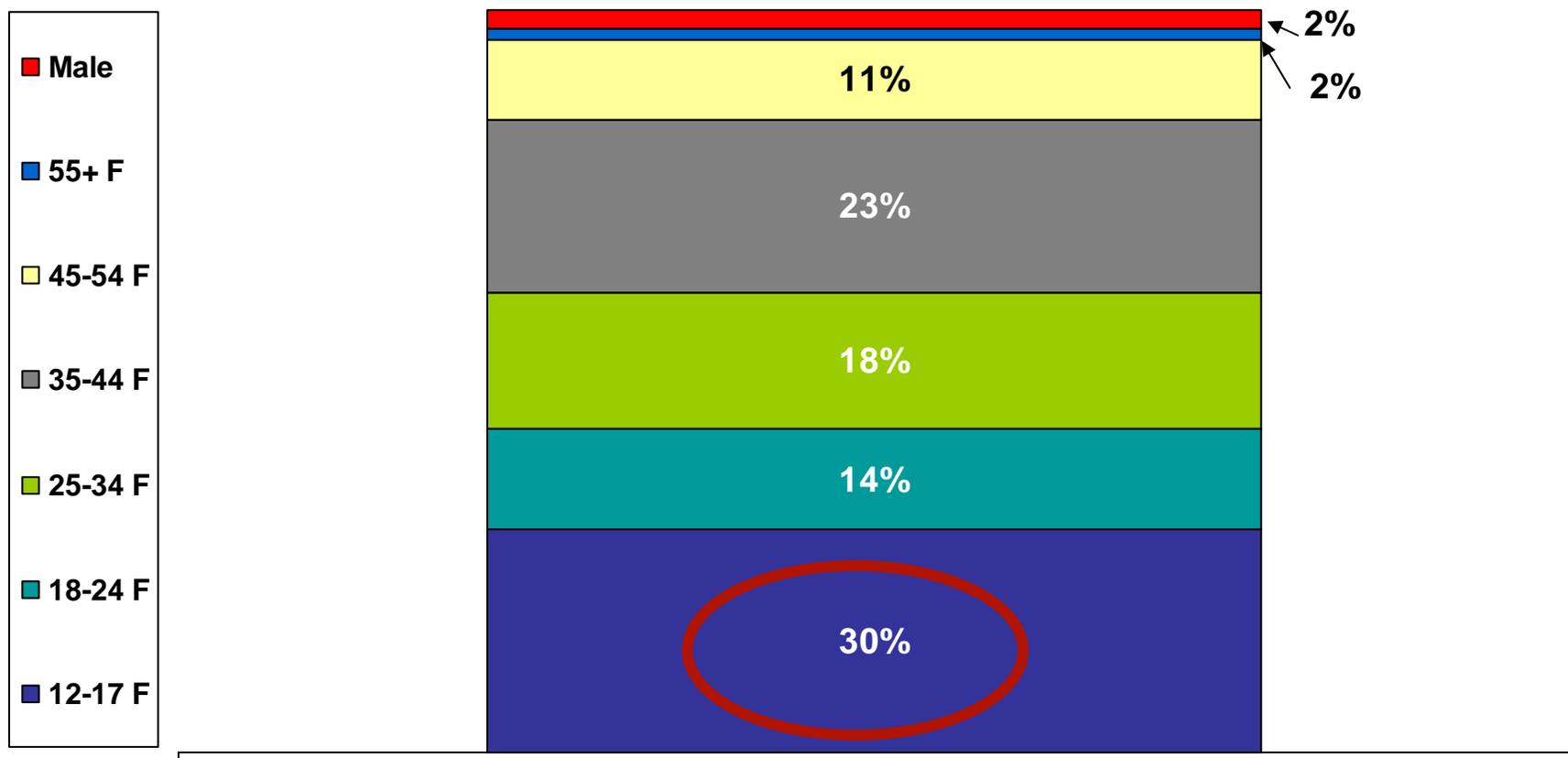
Distribution of Packages Used by Age



Time Period - 52 Weeks Ending 9/15/02

Branded Menstrual Pain Product: Distribution of Users

30% of users are Females 12-17



26 Weeks End:

Jun 25' 06

Summary & Conclusions

- ▶ ≤ 18 overindexes for Acne but underindexes for Allergies & Menstrual Pain. For all of these conditions, ≤ 18 is most likely to choose an OTC remedy.
 - ▶ Teens 12-17 account for 38% of Acne Remedies volume and have the highest penetration and usage rate. Different brands have very different age group usage profiles.
 - ▶ Males ≤ 18 are the single largest user group for one Branded remedy, but have one of the lowest pills/user rates.
 - ▶ ≤ 18 account for only 7% of the total Internal Analgesics category volume, at an volume to population index of 28 and most brands are no exception. However, a top Menstrual Branded product nets 30% of its volume from Females 12-17.
- ➔ Preference for OTC remedies, and affinities for particular brands within a category (although not necessarily for a category), show that the teen market is a viable one, in some cases without even direct targeting.



Thank you!

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