

OTCs ONLINE:

The impact of e-commerce and digital presence on OTC brands



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Introduction

Digital presence and communication is essential in today's market, else your brand would appear to not exist. E-commerce, the selling of products online, is an increasingly popular mode of shopping by consumers. Just how much OTCs move online is difficult to precisely measure, and estimates vary widely by category and who is doing the estimating or measurements. IRI estimates that online sales of OTCs are close to 2% of total industry sales, but are growing from small bases at double-digit rates, as high as 20-25% year over year. Even higher percentages (more than 2%) of online sales are seen for certain categories, notably nutritional supplements. Undoubtedly, e-commerce as a class of trade is experiencing explosive growth, which prompted this examination of the top-selling OTCs and their digital activity and presence.

The OTC market has been slow to adopt digital strategies in part because of the heavy level of regulatory scrutiny under which the products are sold relative to the more lax regulatory environment in which personal care or food marketers operate. Lawmakers regulate the safety, effectiveness, claims, and packaging of each OTC brand, including closely controlled claims that can and cannot be made. Therefore, marketers of OTC brands have been hesitant to jump aggressively into digital marketing since the company is no longer fully in control of

the brand's message in the digital forum, such as with bloggers and on social media. However, as e-commerce continues to evolve from being just a sales channel to also a critical awareness driver, leveraging e-commerce will become critical to all CPG brands' growth¹. Digital is expected to have influenced about 77.0% of all retail sales in 2016, with a total retail value of more than \$2 trillion². Because this concept of developing e-commerce and digital strategies is so important, Kline and IRI have collaborated, using data from Tribe Dynamics, to examine what the leading OTC brands are doing to connect with consumers online and will explore how new and improved digital and e-commerce strategies can help expand sales of the industry.

The five OTC brands included in this assessment and shown below have the highest brick-and-mortar retail sales from January-June 2017.



Mucinex



Advil



Claritin



DayQuil & NyQuil



Tylenol

Table 1: Leading OTC Brands' Retail Sales, January-June 2016 and 2017

\$ Million

Brand	January-June 2016	January-June 2017	Growth %
Mucinex	406.8	456.9	12.3
Advil	254.6	246.6	-3.1
Claritin	246.6	244.2	-1.0
Vicks DayQuil & NyQuil	190.2	204.5	7.5
Tylenol	167.6	190.5	13.6
Total	1,265.8	1,342.7	6.1

Source: IRI MULO data

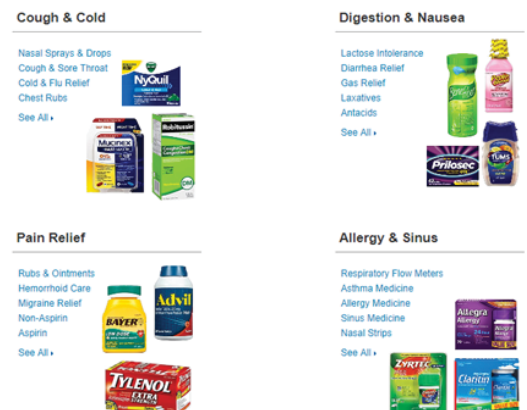
What's in an OTC website

OTC medications, especially the leading five brands—Mucinex cold medications (Reckitt Benckiser), Advil pain relievers (Pfizer), Claritin allergy medications (Bayer), Vicks DayQuil & NyQuil cold medications (Procter & Gamble), and Tylenol pain relievers (Johnson & Johnson) —are not ordinarily the most natural fit for online purchases. This is because consumers typically purchase products online because of the convenience, flexibility, reliability, and transparency of the channel. However, in the case of colds, pain, and allergies, consumers most often need the medication immediately to relieve symptoms. Thus, purchasing OTC medications online tends to be more of a cabinet-stocking exercise, rather than for immediate use. We believe this is especially true for regimen products like certain laxatives and nutritional supplements. Furthermore, we believe automatic refills at the right cadence may actually assist in compliance with the regimen. Of the five brands examined in this paper, perhaps analgesics have the greatest chance of regimen behavior.

When looking at each of the five leading OTC brands' websites, it is the norm to find that the brands will redirect consumers to another website to make a purchase or show retail stores where consumers can purchase their brands online or in-store. In some industries, consumers might be turned off by being redirected to another retailer to purchase; however, this strategy works for the OTC industry as the brands are redirecting consumers to popular and highly regarded websites for purchase.

Amazon is the go-to website to which these brands are redirecting consumers. There are about 80 million Amazon Prime memberships in the United States in 2017, the retailer offers free 1-2-day shipping and even 1-2 hours shipping in select cities³ and is a company that is highly regarded for its ease and convenience of doing business, focused on continuing to raise the e-commerce bar². While these shipping options may not be convenient for the bed-ridden consumer who needs their OTC medication right away, they are quick and convenient options for those looking to stock their cabinets. In addition to being a good place for stocking up, Amazon is a remarkable marketing platform for reach. All marketers should be capitalizing on Amazon's status as the number five overall website based on unique visitors². Amazon's outstanding number of unique visitors to its site daily creates an opportunity to reach a great number of potential consumers, who may have never visited an individual brand site or brick-and-mortar store. Other websites to which brands are commonly redirecting consumers are Walgreens, CVS, Costco, Harmon Face Values, Meijer, Rite Aid, Target, and Walmart, to name a few.

While most OTC websites do not have an option to purchase brands on their own site, these websites are still valuable. This is because websites can be much more than a purchase channel, but a critical marketing channel, which help consumers discover and understand a brand. Exposure online has been correlated with increasing purchases in the brick-and-mortar world, as well as growing online basket spend².



Amazon.com OTC category offerings

Online reviews come with a mix of opportunities and challenges

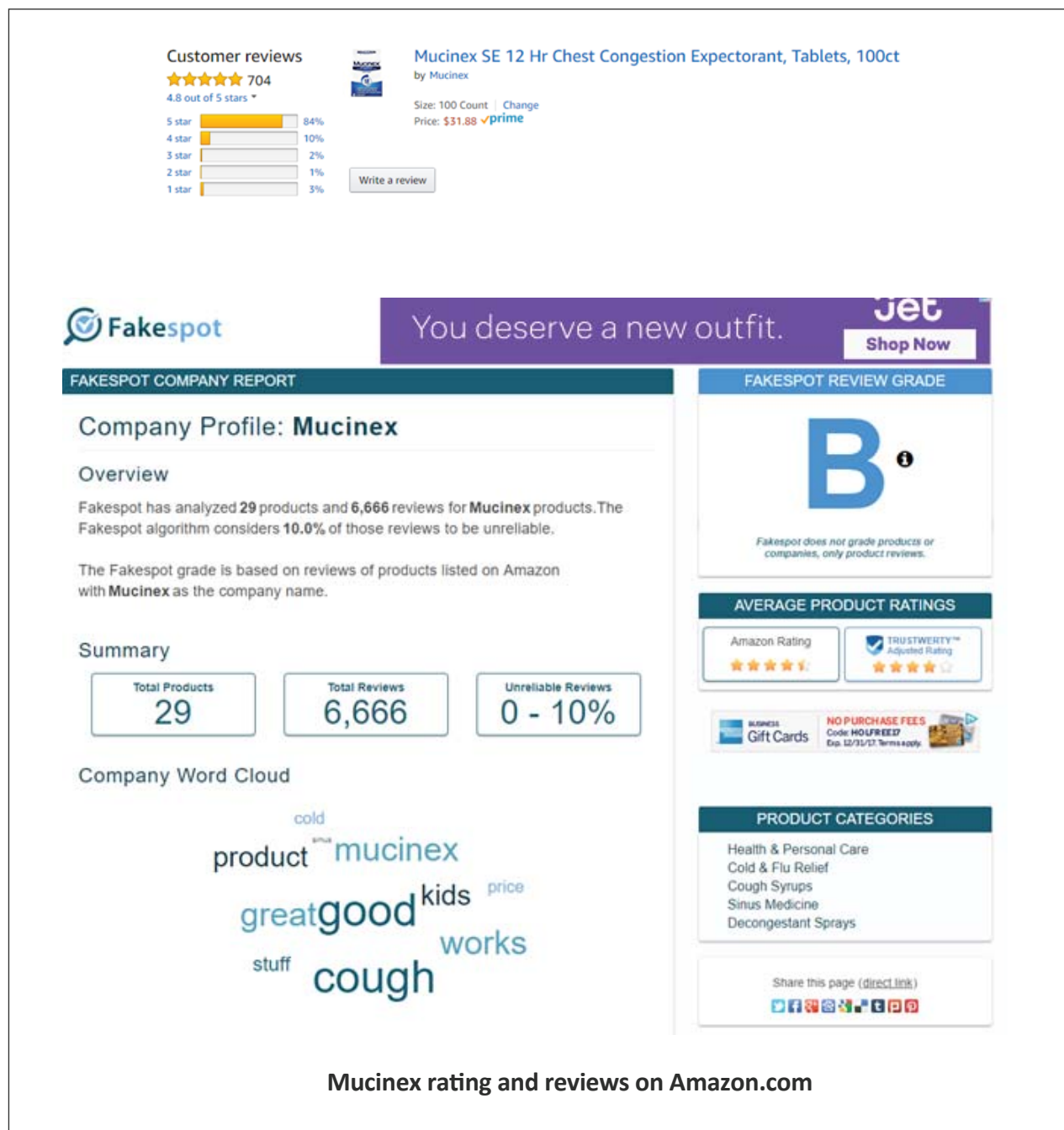


While websites help to discover a brand more deeply, there is arguably an even more important aspect of the online world that has emerged—the concept of reviews. In today's world, consumers are often using reviews and ratings to make informed purchase decisions. Online reviews are a great way for consumers to learn more about other users' experience with a certain product. Reviews can be found on brand and retailer websites, and real consumers can give input ranging from how effective and fast the OTC worked for them to something as simple as their thoughts on the container the OTC comes in. Any commentary can be useful to various users looking for advice or trying to decide what OTC is right for them. In addition, there are also different websites and publications that rank different OTC products. Reviews.com, for example, reviews the best cold medicines, allergy medicines, multivitamins, vitamin C, and vitamin D products.

While positive reviews can indicate to a consumer that a product has been used by many others and is safe to purchase, poor reviews can really be detrimental to a brand. While reviews are an important indicator of the quality of a product, not all products, especially when it comes to the OTC market, will be the right fit for use for everyone. As a result, no manufacturer is exempt from poor reviews. Poor reviews of an OTC may include details about an allergic reaction someone had to a specific ingredient they are sensitive to. The problem is that not everyone will have this same reaction, so it is important for manufacturers to make it well known that each and every review should be taken with a grain of salt.

The benefit of a poor review is that it may reveal important information to the manufacturer on product performance and be viewed as an "adverse event." This is one specific reason that OTC manufacturers have been careful regarding their communications on the Internet. It is difficult to capture every poor review of a product, yet the FDA requires that all attempts are made to do so. Having said that, even poor reviews help other consumers to select the product that may work better for them and thus such reviews play just as an important role as the positive reviews, from a consumer's point of view.

Just as important as the number of reviews a product has, the authenticity of reviews are now becoming a larger issue among many different industries. Automated reviews by non-purchasers are beginning to infiltrate the web, as companies and brands scramble to increase their review count, or competitors try to sabotage their competition. It is important for manufacturers and consumers alike to also look at different websites which score the credibility of online reviews. Fakespot.com is such a website analyzing reviews and bringing the issue of review authenticity to the forefront.

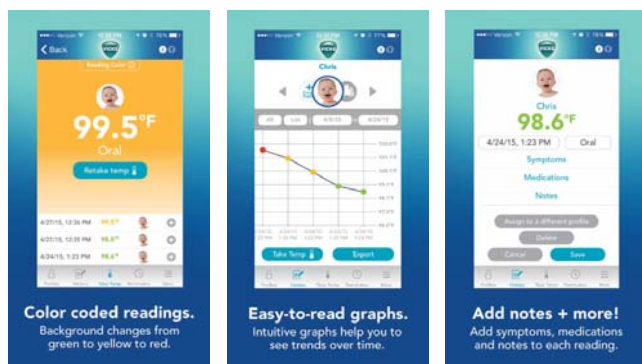


OTC brand apps are lagging

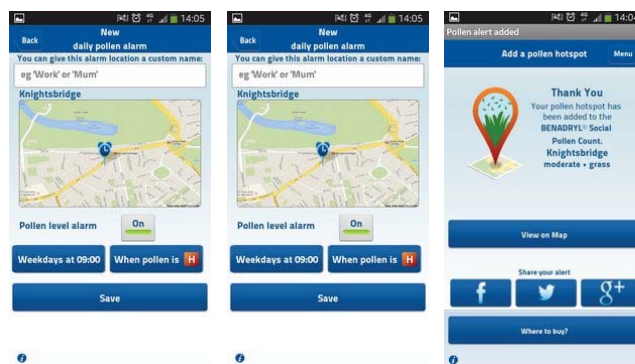
U.S. consumers are becoming more accustomed to tracking their health through fitness trackers, watches, and health applications (apps). In addition to using technology to better track consumer health, U.S. consumers are also turning to the Internet and mobile apps, such as Web MD, for health care information. Sixty-one percent of consumers have noted they have downloaded a mobile health app that tracks weight loss, exercise, women's health, sleep and meditation, and pregnancy⁴. These apps and internet websites are in unique positions, in that they can help consumers make informed decisions about their health and medications. While there are many reference, medical education, and virtual medical healthcare apps on the market, there are very few OTC brands that have launched apps to help support the purchase process or support an advanced digital strategy.

Out of the 100 leading OTC brands, there are only three OTC brand applications that continue to exist on the app store in 2017. This includes the Vicks SmartTemp Thermometer (Procter & Gamble) app, which was launched in July 2013 to track temperatures for the entire family, the Excedrin Migraine Experience (GlaxoSmithKline) app, which was launched in 2016 for users to share migraine simulations with others, and the Benadryl Social Pollen Count (Johnson & Johnson) app, which send its users live pollen alerts in their area. This app also helps locate the nearest Benadryl retailers. There are several other brands that did have apps in the past, such as Nicorette (GlaxoSmithKline), Robitussin (Pfizer), Metamucil (Procter & Gamble), Imodium (Johnson & Johnson), Visine (Johnson & Johnson), Pediacare (Prestige Brands), and Breathe Right (GlaxoSmithKline); however, these OTC brand apps are no longer available on the app store.

It is unfortunate to note that none of the five leading OTC marketers have free apps. This is an area that could improve the user experience of each of these OTC medications. It could also be a strategy to grow the consumer base for these brands. Possible app content that would benefit consumers would be information on the OTC, reviews, a symptom check list with product recommendations, a weight/dosage calculator for pediatric OTCs, possible negative interactions with other medications, reminders to retake the medication, cold and flu/pollen levels, coupons or information on retailers with OTC sales, and a purchase option. Since the cough/cold aisle is notoriously confusing for consumers to navigate, as there are many symptoms to treat and a variety of products often with combinations of ingredients and multiple claims to choose from, an app from a cough/cold brand helping consumers navigate this complex aisle with a checklist of symptoms, for example, would empower the consumer to make better purchase decisions and get more effective relief of their symptoms.



Vicks SmartTemp App Screenshots



Benadryl Social Pollen Count App Screenshots



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Leading OTC brands and earned media value



Tribe Dynamics quantifies the value of social publicity or word-of-mouth marketing known as earned media Cvalue. Earned media value (EMV)⁵ is a specific dollar value evaluated by a brand's social media post analysis, examining the engagement metrics, quality of publisher, total audience size, and estimated impressions through the different social channels of YouTube, Instagram, Pinterest, Twitter, and blogs.

Earned media value for the five leading OTC brands total about \$7.2 million for the first six months of 2017. Compare this to earned media value for the leading brands in other industries, like that of the cosmetics industry, and OTC EMV is miniscule. The leading marketers in the cosmetics industry can have over a \$1 million EMV in one month. Additionally, it is important to note that advertising spending during the same timeframe by the same five OTC brands is about \$178 million. As a result, it is evident that in this current OTC environment, there are important reasons why EMV is not higher.

First, it is likely these brands are not being talked about on social networks because of the brands' slower adaptation to digital technologies. For instance, Tribe Dynamics found Facebook to be the strongest platform for connection of these OTC brands with their consumers, with the five brands' total EMV for the platform quantified at \$1.3 million during January-June 2017. However, diving deeper into the sheer number of posts that these brands attach to their Facebook pages shows an astonishing lack of content. As an example, the leading OTC marketer in 2017, Mucinex, posts only three times on its Facebook page from January-June 2017. Consumers are not interacting with the brands on social networks because brands are not driving connections with consumers on these social pages.

It is also important to note that social media helps to connect to a very small, niche group of consumers, and not necessarily to the masses, like traditional advertising through TV and magazines reach. Earned media value, while an added benefit that helps target a smaller, digital savvy audience, is hard to correlate with the growth or decline of a brand. It is also important to keep in mind that EMV captures everything said about a brand, positive or negative.

Mucinex, for example, is the leading OTC cold medication brand in 2017 and with strong growth of 12.3%, despite its earned media value declining about 3.5% during the same time frame. Traditional advertising still

continues to be a very important part of the growth equation for OTC brands, as do many other factors, including the strongest of all: incidence of symptoms.

Table 2: Earned Media Value by the Five Leading OTC Brands, January-June 2016 and 2017

Brand	Company	Category	\$ Jan-June 2016	\$ Jan-June 2017	% Change in EMV
Vicks DayQuil & NyQuil	Procter & Gamble	Cold medications	2,566,311	2,583,123	65.5
Tylenol	Johnson & Johnson	Pain relievers	1,569,186	1,574,643	34.8
Advil	Pfizer	Pain relievers	2,167,144	2,170,544	15.7
Mucinex	Reckitt Benckiser	Cold medications	96,794	96,761	(3.5)
Claritin	Bayer	Allergy relief	741,736	736,604	(69.2)
Total			7,141,171	7,161,675	0.3

Source: Tribe Dynamics Earned Media Value.

Table 3: Number of Posts on Facebook by the Five Leading OTC Brands, January-June 2016 and 2017

Brand	Company	Category	Jan-June 2016	Jan-June 2017
Advil	Pfizer	Pain relievers	46	49
Claritin	Bayer	Allergy relief	41	28
Vicks DayQuil & NyQuil	Procter & Gamble	Cold medications	6	10
Tylenol	Johnson & Johnson	Pain relievers	0	5
Mucinex	Reckitt Benckiser	Cold medications	9	4
Total			102	95

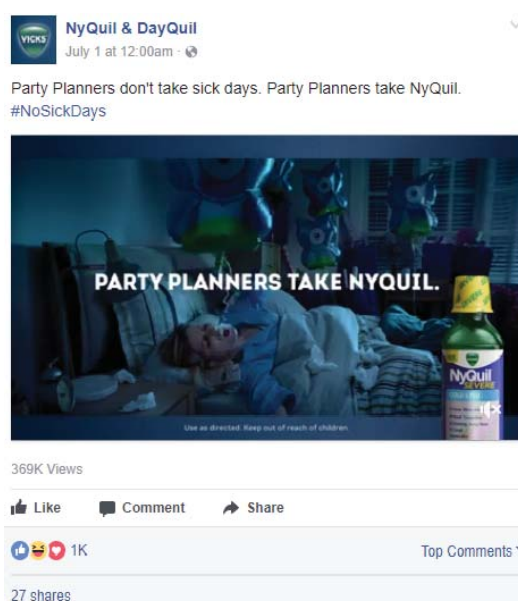
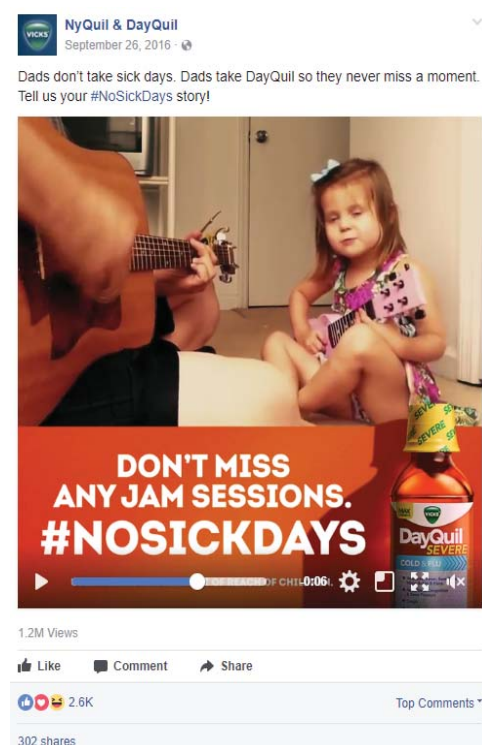
Source: Manually counting Facebook posts of manufacturers in September 2017.

Winning social and digital campaigns

Procter & Gamble's **Vicks DayQuil and NyQuil**, the third leading cold medication brand, is the leader when it comes to earned media value and also has the strongest growing EMV from January-June 2016-2017, at 65.5%. About 50.0% of this EMV comes from Facebook. The company posts its commercials to its Facebook page and is

known for commercials that emphasize dads/moms/everyday people like party planners and sports fans who “don’t take sick days, they take DayQuil/NyQuil so they never miss a day or moment”. As consumers can relate to these videos, they are often sharing the posts on Facebook, demonstrating a greater level of interest in the videos than simply “liking” or commenting on them, increasing the EMV for these brands. Vicks DayQuil and NyQuil also encourage posts of this type by telling its followers to “Tell us your #NoSickDays story” and use their hashtag #NoSickDays on all their own posts.

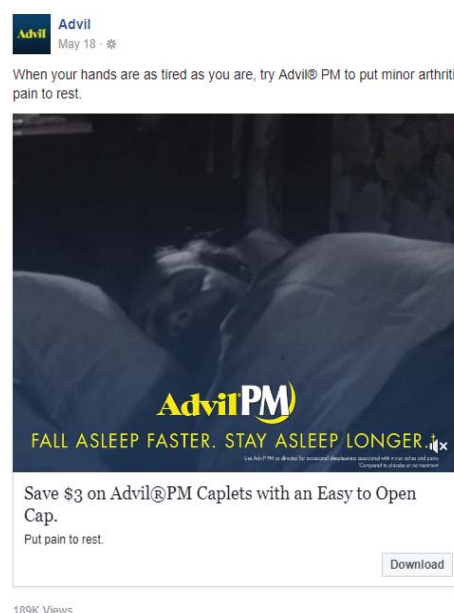
Positive public relations also continue to play a role in the reputation a brand builds. Vicks DayQuil and NyQuil celebrates its accomplishments on Facebook by posting how the brand was named the most trusted cold and flu remedy in America by Reader’s Digest and also the #1 pharmacist recommended brand for daytime cough and cold symptom relief by *US News and World Report*, as well as *Pharmacy Times*.



NyQuil and DayQuil Facebook Posts

Advil, the second leading brand on the OTC market, is another brand with growing EMV from January-June 2016-2017. However, sales of the brand during the same time declined by about 3.1%, proving that strong EMV does not necessarily translate into more sales for a company at the time of a strong digital campaign. This decline in sales may be correlated to Tylenol’s strong 13.6% growth in the market, for instance.

Throughout its different social pages on Instagram and blogs, Advil's earned media is more evenly spread than Vicks DayQuil and NyQuil. Still the most earned media, at about 30.0% of total EMV, comes from Facebook. Like Vicks DayQuil and NyQuil, Advil posts commercials on its Facebook page, and additionally, adds coupons to those posts. The brand focuses on relieving pain for things like arthritis, menstrual cramps, and emphasizes falling asleep faster and longer with Advil PM. These posts generate many shares and views. Much of Advil’s earned media on Instagram comes from consumers posting why they use the brand and hashtagging #advil.



Advil Facebook Posts

Claritin, the third leading brand ranked by sales in the OTC industry, appeared to lose the most earned media value from January-June 2016-2017, down by 69.2%. On its social media pages, the brand focuses on encouraging consumers to get outdoors with less allergy symptoms by taking Claritin and hashtagging #Claritin and #BeAnOutsider. The reason the brand's EMV could be down from the previous year is because the brand announced its partnership with celebrity Kelly Rowland in 2016, which generated a lot of earned media for the brand during that year. The collaboration generated several different posts about the celebrity in 2016, which was met by enthusiasm by her fans during that year. The brand offers a unique proposition to its consumers on its webpage by providing an allergy forecast for a location that a user can key in and offering coupons.



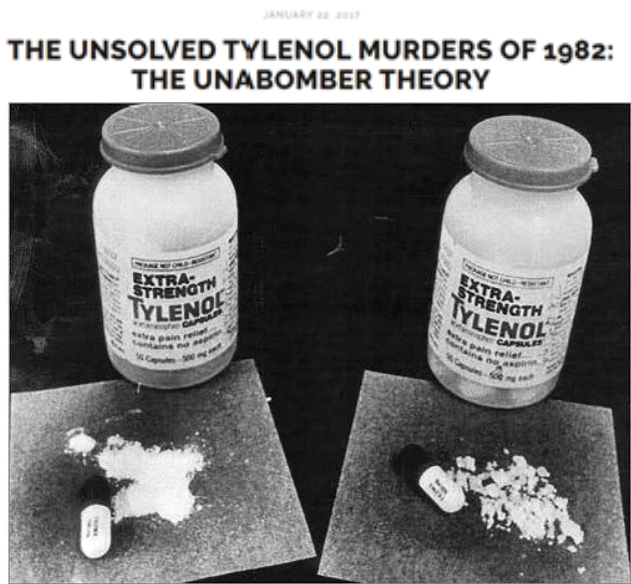
Claritin Instagram Post





Claritin Website Screenshot

Tylenol, the fifth leading brand on the OTC market, has the third leading EMV in the industry at \$1.6 million and also the second strongest EMV growth of the top five leading marketers, at 34.8%. Tylenol is focused on rebuilding its flagship brand, after a hiatus from the market during 2009-2015. Unlike its competitors, blogs make up a significant portion of Tylenol’s EMV. Blogs allow users to write about a brand in any way they like, leaving brands vulnerable to others’ perceptions. EMV does not take into account the sentiment of a post, so if a blog user is unhappy and posts about Tylenol negatively, EMV increases, because the brand is still being marketed.



Tylenol Mentions in Blogs

Amy Morin
What Mentally Strong People Don't Do

Dreading Something? Tylenol Might Dull the Pain

Research says acetaminophen relieves emotional pain too. Like 36

Posted Feb 24, 2017

SHARE

TWEET

EMAIL

MORE

Whether you've got a root canal scheduled for next month or you're giving a big presentation tomorrow, feelings of dread can consume you. In fact, researchers have discovered that dread is the most difficult emotion to tolerate.

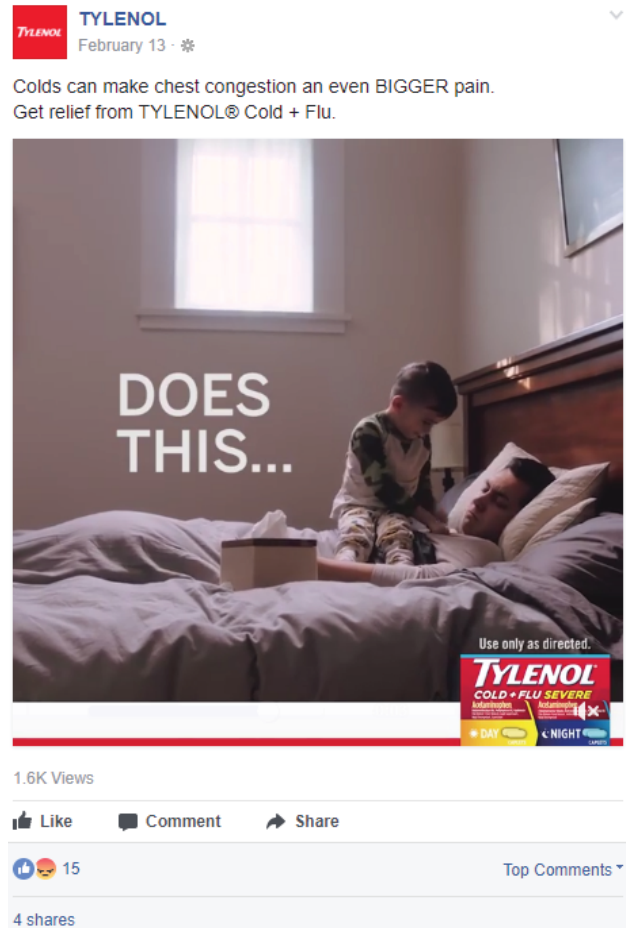
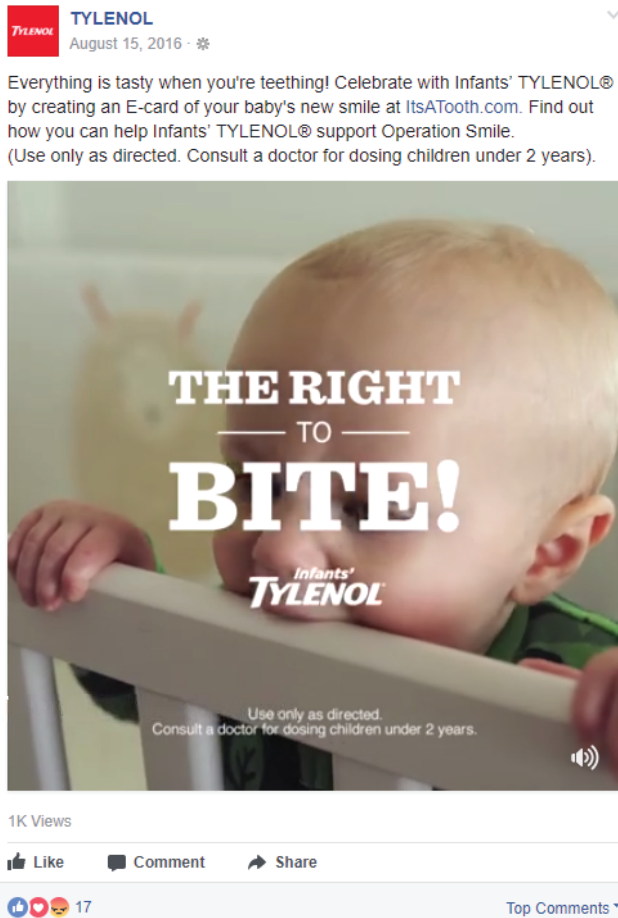
And in a strange twist, anticipating pain—physical or social—is worse than experiencing the pain. Research has shown this time and time again.

Source: Fotolia.com

A 2013 study, for example, asked participants whether they'd like to receive a more painful shock now or a less painful shock later (up to 15 minutes in the future). A full 70%

Tylenol Mentions in Blogs

In 2017, there are various blogs promoting Tylenol, but also some such as huntakiller.com, which tries to track the unsolved Tylenol murders of 1982. While the blog is focused around Tylenol, this type of promotion is not necessarily a PR tactic desired by brands. After blogs, Facebook is Tylenol's main social platform for interaction. The company posts its commercials to its page, allowing consumers to share, like, and comment on them. An interesting campaign Tylenol promotes in 2016 on its social pages is one that allows parents to create an e-card of their baby's smile at itsatooth.com. This link takes consumers to a page sponsored by Tylenol welcoming baby's first tooth by sharing signs that their child may be teething and get them more information on Infants' Tylenol.



Tylenol Facebook Posts

Mucinex, the leading brand in the industry, has very little EMV compared to its competitors. For example, Vicks' Dayquil and Nyquil, also cold medicines, have more than double the EMV of Mucinex. It is interesting to note, that just as its competitors, Mucinex posts its commercials to its social media pages, which are viewed, liked, and shared by its consumers. However, Mucinex posts much less to its social pages than its competitors. For example, Mucinex only posted three times during January-June 2017, while Vicks' Dayquil and Nyquil posted 10 times during the same timeframe. The lack of posting by the brand on its social media pages means less chance for consumers to interact with the brand online and less EMV.

Mucinex
March 16 · 🌟

Join the Mucus Fighters today for the chance to win prizes, try new products and much more.



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10K Views

Like Comment Share

80

Top Comments

13 shares

Mucinex
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New Fast-Max® Clear & Cool. Feel the menthol burst. And clear your worst cold symptoms. Use as directed.



403K Views

Like Comment Share

427

Top Comments

59 shares

Mucinex Facebook Posts

Outlook

As our world continues to become more digital, OTC brands will find that the stronger the e-commerce and digital strategy, the more well positioned they will be for future growth. While OTC brands are likely to proceed with caution into the digital space, there will be a gradual increase in the digital marketing of OTC brands in the future. With concentrated efforts on this segment, double-digit online growth in the OTC market is possible and marketers will more routinely measure the value and ROI of efforts spent on online marketing.⁶ The following factors will influence the OTC market in the near term:

- Consumers will continue to shop wherever it is most convenient. Therefore, establishing a strong omnichannel strategy, with a better understanding of where consumers are shopping online for OTCs, is imperative. Ensuring that each e-commerce platform has easily accessible information about brands, reviews by real consumers, and a convenient, easy to shop option is important.



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- Consumer-facing apps is an area of improvement from which OTC companies could benefit. While some have ventured into the area without success and since pulled their apps, there is an opportunity for manufacturers to build a unique brand experience through an app.
- Because impulse buys, as well as trips to drug stores are down, there may be huge opportunity for OTC marketers to tap into the online world for sales. This is especially true as online vendors reduce delivery time to within hours. The virtual shelf is infinite. Rising to the top of this infinite selection of brands requires orchestrated brand communication online, including posts on social media pages which can foster the necessary consumer connections. Innovative new types of content will also be key to stand apart from the competition. In 2017, the five leading OTC brands are all very similar in their digital content. Thinking outside the box will set a new precedent in the way the OTC market engages with consumers on social media.
- The growing support for live streaming and chat boxes by brands is another area that merits exploration by OTC brands into the forecast period. These types of communications allow brands to better interact with their consumers by answering questions and sharing suggestions in real time.

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 3. <http://www.businessinsider.com/amazon-prime-subscribers-hit-80-million-2017-4>
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 5. About Tribe Dynamics' EMV Analysis.
 6. EMV analysis provided by Tribe Dynamics.
 - EMV is evaluated by a post analysis and a channel ranking, using the criteria below to determine the relative media value of the content created.
- Measurement of the impact of digital communication is already commonplace as part of Marketing Mix studies and other media analytics techniques.⁶

Post analysis

- Engagement Metrics - To determine the value of individual endorsements, a specific value was assigned to each channel based on the perceived influence of its earned media. In addition, unique values were also assigned to the various forms of endorsements on each channel based upon the implied level of engagement and interest in the content (likes, shares, views, retweets).
- Quality of Publisher - To reduce noisy fluctuations in measured data, influencers with low levels of engagement were eliminated from the index.
- Total Audience Size - To determine the total addressable audience of an influencer, we re-calculate audience size twice daily by channel.

- **Estimated Impressions** - To determine the number of people that have viewed a piece of content, we calculate the estimated number of impressions based upon the total addressable audience of the influencer (number of fans), the average percent exposure for each channel (Facebook, Twitter, etc.), and engagement metrics for channels in which virality factors exist (specifically Facebook, Twitter, Pinterest).

Channel ranking

- **YouTube:** A YouTube view does not necessitate active engagement with the video. The viewer may or may not be watching and their level of interest has not exceeded a level that would inspire them to respond. The creation of a YouTube video is the most active form of engagement because of the planning and invested interest implied by the creative process.
- **Instagram:** An Instagram like is valued slightly higher than a Facebook like because of the visual nature of the channel itself. An Instagram comment is more valuable than one from Facebook because there is a higher likelihood for a broader audience to see these comments.
- **Facebook:** Comments show a slightly greater level of engagement because it has incited an opinion and response to the content. Shares show the greatest form of engagement for Facebook, as sharing the content can spark a dialog that reaches a larger audience.
- **Pinterest:** Pinterest comments and shares are more valuable than those from other channels because of their rarity. Pinterest users primarily use the channel as a bookmarking mechanism, pinning and liking posts; comments and shares imply a much greater level of interest and engagement with the content.



- Blogs: Blog views do not necessarily imply active engagement with the content. By contrast, a blog post itself is more valuable. The publisher is actively engaged and creating additional content to share with a new community. There is also a large fixed SEO value from blog articles.
- Twitter: Twitter more recently has been used primarily for sharing of content generated on other platforms, such as Instagram and news content.

About the IRI/Kline alliance

Information Resources, Inc. (IRI) the global leader in innovative solutions and services for consumer, retail and over-the-counter healthcare companies, and Kline & Company, a global market research and management consulting firm, have established an exclusive alliance to serve the worldwide, over-the-counter (OTC) drug and overall consumer healthcare industries. This powerful alliance will provide a higher level of data accuracy and an unparalleled, global range of thought leadership on stimulating topics in the consumer healthcare space.

As part of this collaborative relationship, IRI will contribute its granular, widely recognized, point-of-sale (POS) market data, related insights, and thought leadership. Meanwhile, Kline will provide its unmatched historical database, global network, and 360-degree view of the complex OTC drug market, including its comprehensive channel coverage and vast expertise in the area of Rx-to-OTC switches.

The collaborative thought leadership will manifest through white papers like this one on such topics as Rx-to-OTC switch, merger and acquisition activity, new product innovation, as well as trends and issues in international and emerging markets within the OTC drugs industry.

About IRI

IRI is a leader in delivering powerful market and shopper information, predictive analysis and the foresight that leads to action. We go beyond the data to ignite extraordinary growth for clients in the CPG, retail and especially in the over-the-counter healthcare industries, by pinpointing what matters and illuminating how it can impact their businesses. Experience the power of IRI's mantra "Growth Delivered" at www.IRIworldwide.com.

About Kline & Company

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the agrochemicals, chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

For more information, visit www.KlineGroup.com.

For more information on this white paper or the IRI/Kline alliance, please contact Lisa C. Buono, Client Insights Principal, Health Care Vertical at IRI Lisa.Buono@iriworldwide.com or Laura A. Mahecha, Industry Manager, Healthcare at Kline & Company Laura.Mahecha@klinegroup.com.