

HISPANIC HEALTHCARE JOURNEY

nielsen



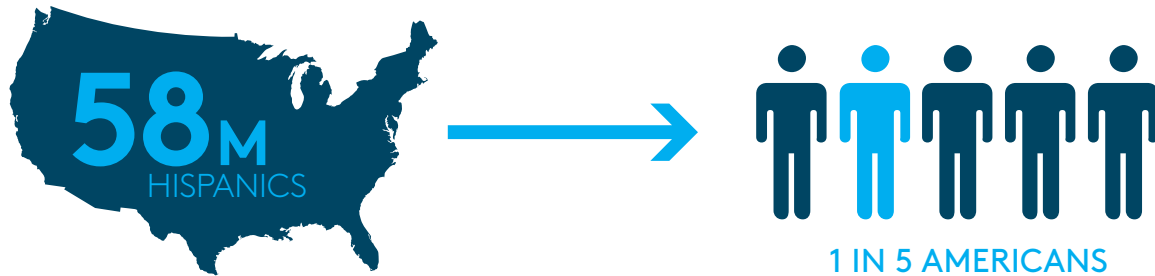
UNIVISION
COMMUNICATIONS INC

THE OTC PATH TO PURCHASE



MEET YOUR HISPANIC CONSUMER

Today, Hispanics are 58 million strong and make up 18% of the total U.S. population. Contributing over six billion dollars to the U.S. over-the-counter market, Hispanic consumers represent an opportunity to grow sales in this vital industry. However, there has been little research conducted to understand what drives purchase behavior among Hispanics.



Univision partnered with Nielsen to study the Hispanic Healthcare Journey and uncover the differences and similarities between Hispanic and non-Hispanic attitudes and behaviors. The study explores how patients manage their path to treatment, as well as consumers' path to purchase for the total OTC market and the key categories of pain, vitamins, cough/cold, and allergy remedies. What follows is a summary of our findings.



PAIN



VITAMINS



COUGH/COLD



ALLERGY

VALUE THEIR HEALTH AND WANT TO TAKE CONTROL

Like most Americans, healthcare is a top priority for Hispanics, however many do not believe that they are in good health — 45% of Hispanics, compared to 26% of non-Hispanics. In fact, Hispanics often feel overwhelmed when trying to make healthcare decisions. In order to gain control of their health, Hispanics proactively look for information that can be of help.

45%

of Hispanics do not feel that they have excellent or good health vs. 26% of non-Hispanics

43%

of Hispanics feel overwhelmed when it comes to taking care of their health vs. 30% of non-Hispanics

64%

of Hispanics actively seek healthcare information vs. 58% of non-Hispanics

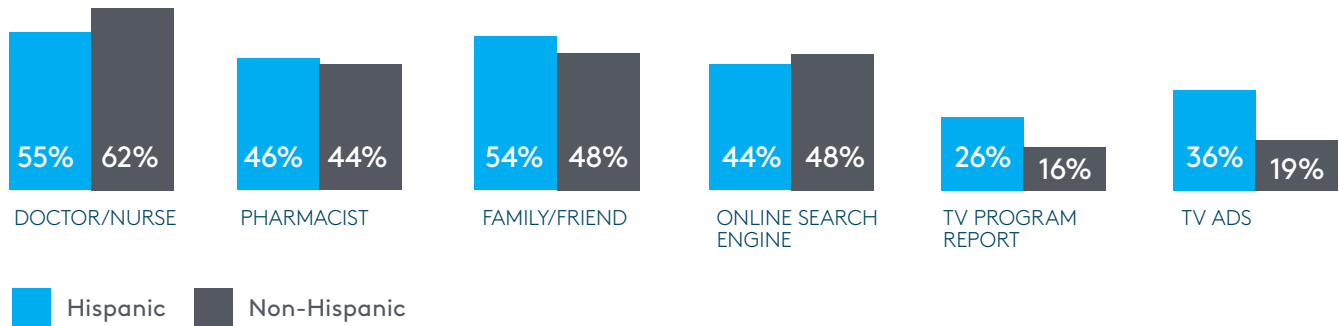
64%

of Hispanics always look for new ways of getting health information vs. 47% of non-Hispanics

RELY ON HEALTHCARE PROVIDERS AND MEDIA FOR INFORMATION

Hispanics rely on multiple sources for healthcare information. They value advice from their healthcare professionals, family, and friends. Hispanics also search online and get information from TV programming and advertisements. For instance, 36% of Hispanics get their healthcare information from TV ads vs. only 19% of non-Hispanics.

Sources of Health Information:



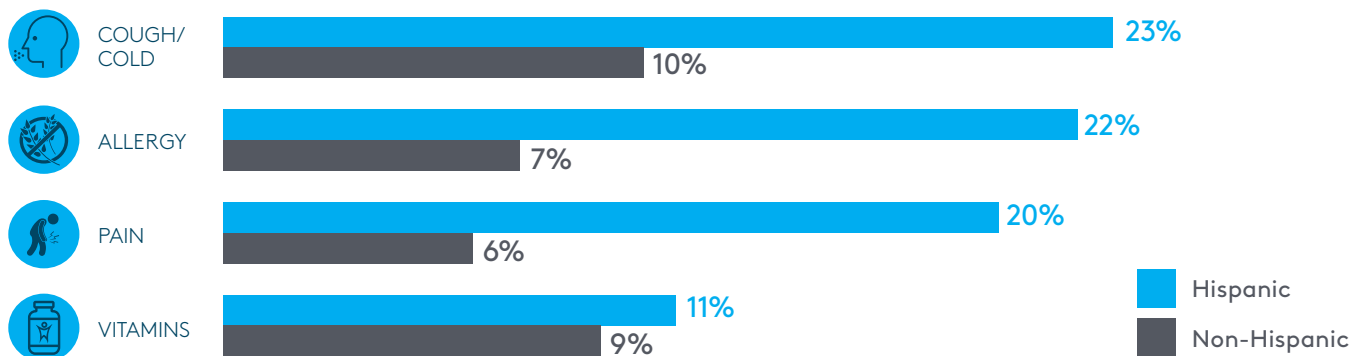
MORE OPEN TO OTC ADVERTISEMENTS

As Hispanics continue to proactively manage their health, they gather information from OTC advertisements. In fact, ad recall tends to be higher among Hispanics with 16% having purchased an OTC product because of advertising vs. 9% of non-Hispanics. When making a purchase, Hispanics are also more likely to remember ads about OTC products.

60% OF HISPANICS FIND OTC ADVERTISEMENTS INFORMATIVE VS. 40% OF NON-HISPANICS

16% OF HISPANICS HAVE PURCHASED AN OTC PRODUCT BECAUSE OF ADVERTISING VS. 9% OF NON-HISPANICS

While purchasing, recalled an OTC ad about:



SPANISH IS KEY

Hispanics value having healthcare information available in their preferred language of Spanish. When searching online and watching TV with their families, Hispanics are more likely to understand and pay attention to ads in Spanish. Hispanics appreciate the brands that earn their loyalty and trust by reaching out in Spanish.

62%

of Hispanics prefer having information resources in Spanish available

59%

of Hispanics feel that Spanish ads are more likely to capture their attention

53%

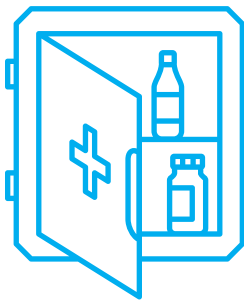
of Hispanics find it easier to understand OTC ads when they are in Spanish

52%

of Hispanics have a more favorable opinion of a brand that advertises in Spanish

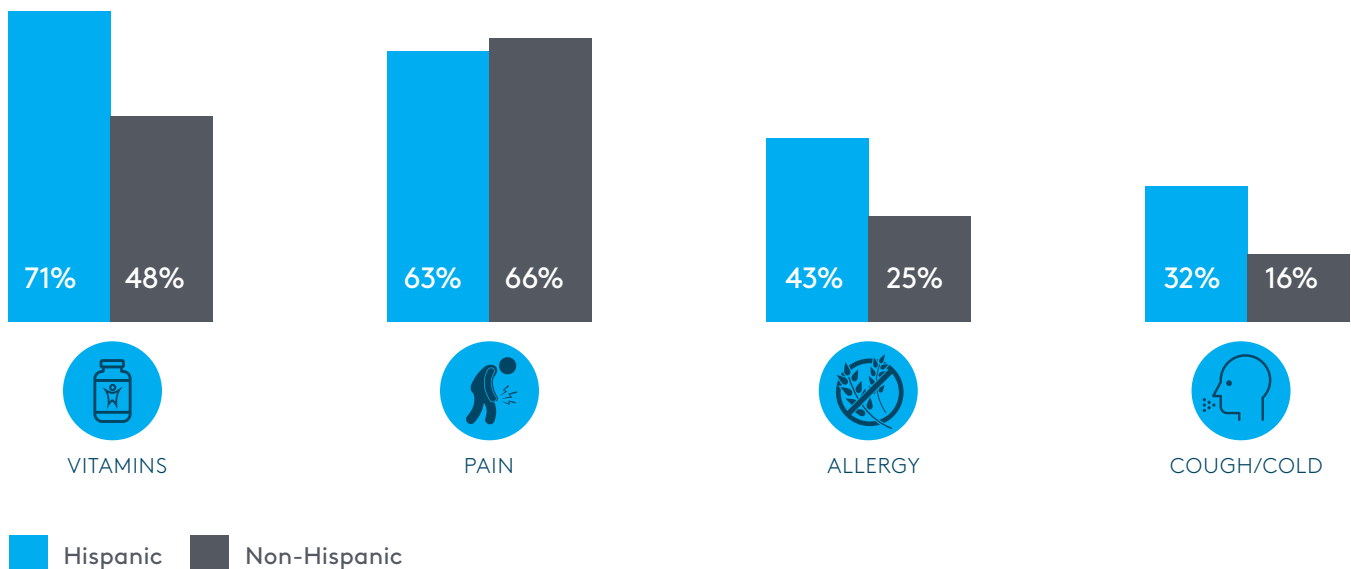
PROACTIVE SHOPPERS

One of Hispanics' main motivations for heading into the store is to stock up on OTC products. Hispanic consumers like to ensure that they always have their preferred brands on hand.



52% OF HISPANICS ARE MOTIVATED TO PURCHASE OTC PRODUCTS TO **STOCK UP FOR FUTURE USE** VS. 38% OF NON-HISPANICS

Motivation for Purchase: Stock Up for Future Use



LESS PRICE SENSITIVE

For most Hispanics, product efficacy is a top concern when selecting a specific OTC product. That’s why price is not the overriding factor in their decision-making process. Product recommendations and having multiple options are key, since Hispanics are often shopping for multiple family members.

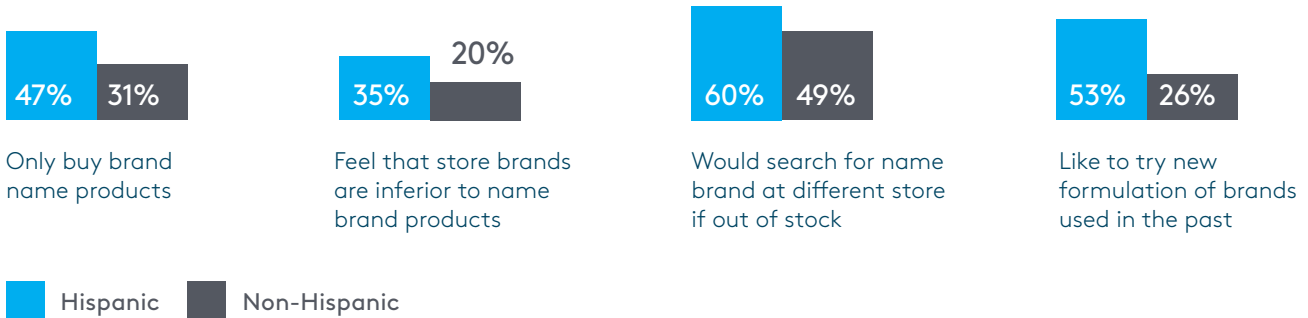
Top Essential OTC Product Attributes:

HISPANIC	ATTRIBUTE	% OF HISPANICS
#1	Is effective/fast-acting/ long-lasting	64%
#2	Is recommended	55%
#3	Has limited side effects	44%
#4	Has variety of options	42%
#5	Is reasonably priced	37%

NON-HISPANIC	ATTRIBUTE	% OF NON HISPANICS
#1	Is effective/fast-acting/ long-lasting	74%
#2	Is reasonably priced	54%
#3	Has limited side effects	46%
#4	Is recommended	39%
#5	Has variety of options	30%

BRAND LOYAL

Hispanics are extremely brand loyal. They know which brands they want before heading to the store, yet Hispanics are open to trying new products from their preferred brands. Once they're shopping, Hispanics will go out of their way to find the brands they want. In fact, 60% of Hispanics would go in search of a preferred brand if it's out of stock vs. 49% of non-Hispanics. Hispanics also become valuable brand advocates by recommending OTC products.



HISPANICS ARE **55%** MORE LIKELY TO RECOMMEND AN OTC PRODUCT TO A FRIEND THAN NON-HISPANICS, ACROSS OTC CATEGORIES & BRANDS.

BECOME A PART OF U.S. HISPANICS' PATH TO PURCHASE

Learn more about the U.S. Hispanic healthcare journey including OTC and Rx patient insights: www.Univision.net/HispanicHealthcareJourney

Source: Univision/Nielsen Hispanic Healthcare Journey Study 2016; U.S. Census Bureau, 2016 National Population Projections Released December 2014; Nielsen Target Track xAOC - 52 Weeks Ending 8/13/2016. OTC Category Includes Health, Oral Care, Feminine Hygiene Departments

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