

Consumer Health Products Survey - Executive Summary

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1. Executive Summary

1.1. Research Purpose and Objectives

The overall objective of this research is to better understand Canadian consumers' knowledge, attitudes awareness and behaviours as they relate to consumer health products.

More specifically, this research seeks:

- To determine attitudes of Canadians with regard to consumer health products;
- To understand how Canadians select and use consumer health products;
- To understand what information Canadians want to see on consumer health products to assist them in their decision making;
- To assess how and from where Canadians seek information about consumer health products; and,
- To gauge the public's knowledge and understanding of the various categories of consumer health products and how they are regulated.

The findings will be used by Health Canada:

- To gain more insight into the Canadian public's views on consumer health products;
- To help ensure that the approach to consumer health products reflects the consumer's needs.

Health Canada will continue to engage with Canadians as the approach moves forward and evolves.

1.2. Summary of Findings

Canadians' Knowledge and Understanding of Consumer Health Products

Canadians have low perceived knowledge of the safety and effectiveness of consumer health products. Canadians generally consider themselves more knowledgeable about non-prescription drugs (35%) than

cosmetics (25%) or natural health products (19%). They consistently rate their knowledge of the safety and effectiveness of consumer health products higher for non-prescription drugs than natural health products or cosmetics. Canadians also generally feel uninformed when purchasing consumer health products (33-58%). Again, to a lesser extent with non-prescription drugs (33%) than natural health products (58%) or cosmetics (45%).

Women, older Canadians (55+), those with at least a college education and those who use consumer health products more frequently all report higher levels of knowledge regarding the safety and effectiveness of consumer health products in all categories and generally feel more well informed about these products.

Canadians do not categorize consumer health products in the same way Health Canada does. For the most part, Canadians tend to categorize products based on their use rather than the particular ingredients in a product. As such, Canadians tend to categorize products like dandruff shampoo and lip balm with sunscreen into cosmetics rather than non-prescription drugs. Interestingly, perceived level of knowledge and frequency of use do not change the way in which Canadians categorize products. They continue to categorize them based on use rather than ingredients like Health Canada currently classifies and regulates these products.

Awareness and knowledge of homeopathic medicine, Ayurveda and SPF varies substantially. Unprompted, most Canadians (95%) are unable to correctly or even partially define homeopathic medicine. When prompted with a variety of responses, less than half of Canadians (42%) were able to correctly define Ayurveda. Canadians were unable to provide a consistent unprompted definition for SPF 15 however, most (75%) could associate it with “sun protection factor 15”.

Awareness of product identifiers also varies with more than half of Canadians being aware of DINs but much fewer aware of NPNs (15%) or DIN-HMs (10%).

Canadians have a general understanding of Health Canada’s responsibilities but a large portion do not understand the details of exactly what these responsibilities entail. More specifically, around two thirds of Canadians understand Health Canada is responsible for many tasks when it comes to product safety of consumer health products such as making sure products are safe before they hit the shelf, setting safety standards for companies to follow, making sure products contain the ingredients they claim to, etc. There is however, some confusion on what this specifically means. For example, half or more of Canadians believe Health Canada reviews and approves all types of product labels before they hit the shelves and/or test products in the laboratory for all consumer health products. Generally speaking Canadians that perceive themselves to be better informed and have higher perceptions of safety and trust are more likely to believe that Health Canada is responsible for most/all of the tasks presented related to non-prescription drugs and cosmetics. This is not the case for natural health products where only increased trust (not safety) is associated with increased perceptions of Health Canada’s responsibilities.

Attitudes and Perceptions towards Consumer Health Products

Canadians’ attitudes and perceptions about consumer health products are in line with their perceived knowledge and understanding. For the most part, Canadians believe non-prescription drugs are safe (70%), but as seen throughout the research, they are less confident in the safety of cosmetics (60%) and even less so with natural health products (51%). This reflects the finding that Canadians believe more strongly that Health Canada is responsible for ensuring the safety of non-prescription drugs(74%) and less so for cosmetics (65%) and natural health products (67%). More Canadians believe that the government (Health Canada) is primarily responsible for ensuring safety rather than the manufacturers of consumer health products (78% vs 61%).

Attitudes toward claims on labels are another point of interest. Canadians do not trust the claims made on the labels of consumer health products (only 18-36% trusts them). However, even though Canadians claim to be wary of these claims, they also believe these claims are supported by science (66%) and proof from manufacturers (66%). Clearly there is a disconnect with these findings and it is unclear why Canadians lack trust in claims when they also feel they are supported by science and proof from manufacturers.

Perceptions about product identification numbers (DIN, DIN-HM and NPN) tend to be in line with Canadians' attitudes towards the product categories. These numbers are most associated with product safety and to a lesser extent, being without contamination (there is little association with effectiveness of a product).

Again we see that women, older Canadians (55+), those who use consumer health products and those who feel they are more informed display similar attitudes towards consumer health products. For instance, they are all more likely to believe all consumer health products are safe, more likely to trust the claims on all consumer health product labels and more likely to believe it is Health Canada's responsibility to ensure a product is safe and claims are supported by science.

Selection and Use of Consumer Health Products

Consumer health product usage varies greatly by category and type of product. Cosmetics are the most frequently used consumer health products, particularly products for hair (79% uses at least once per week) and skin (70% use at least once per week). Natural health products such as vitamins and minerals are also frequently used by a majority (56% uses at least once a week) of Canadians. Seasonal products and specific types of medicines are used by the majority of Canadians (88-92%), however on a less frequent basis. The same is true for sunscreen, antacids and allergy relievers – all used by most Canadians (58-89%), but infrequently. The majority of Canadians never use traditional natural health products (70%) (such as traditional Chinese medicines, or Ayurveda) or homeopathic products (66%).

Incidence and frequency of reading product labels is fairly consistent between the three categories of products. Consistently for each category, dosage and directions are two of the most frequently read portions of the label, while the least commonly read elements are where the product was made and endorsements. The most noticeable difference between categories is that frequency of reading labels is universally higher for non-prescription drugs (23-67%) – all elements are more likely to be viewed at every purchase or at every use, compared to natural health products (23-58%) and particularly cosmetics (20-49%). Brand name is the only product element viewed more frequently on cosmetics than the other two categories.

With regard to information desired to make a purchase decision, directions, ingredients and product warnings are the most important to Canadians. For all three product categories, a strong majority of Canadians want to have directions on how to use the product (70-77%), ingredients (66-72%), warnings (66-75%) and dosage (71-78%) (with the exception of cosmetics) directly on the product to help them to decide what to buy. Brand name is more important to have on non-prescription drugs and cosmetics than it is on natural health products, while the origin of the product is of higher importance on natural health products. Package inserts and endorsements are the least important package features in the product purchase decision, regardless of category.

Product use plays a role in how much information Canadians' want for purchase decisions. Frequent users of natural health products such as homeopathic products want more information than infrequent or non-users while frequent users of traditional natural health products want less information than infrequent or non-users. With regard to non-prescription drugs, generally speaking frequent users tend to require less information than infrequent or non-users. Cosmetics users such as hair and skincare products tend to want more information to support their purchase decisions. Furthermore, Canadians who consider themselves informed about non-prescription drugs and Cosmetics also require more information to make purchase decisions.

When it comes to determining the safety and effectiveness of consumer health products, Canadians look to several sources. For natural health products, there are clearly three top sources of information that Canadians look to – asking a health professional or practitioner, researching the product online and reading labels or product inserts. That being said, none of these sources are used by a majority (44-48%). Non-prescription drugs have two sources of information that stand out above the rest – asking a health professional or practitioner and reading labels or product inserts, though only a very slight majority (53-57%) use these sources. For cosmetics, relying on brand name (44-45%) and reading labels or product inserts (43%) are the main sources of information. It is also worth noting that a sizeable portion of the population simply doesn't think about safety or

effectiveness (10-20% and 10-9% respectively); however more think about it for non-prescription drugs (89-90%) than natural health products (86-88%) and cosmetics (79-80%).

Canadians also use a variety of sources to look for product-specific information in each category. While there are no information sources that are used by a strong majority of Canadians, search engines (41-43%) and product labels (43-51%) are two of the most commonly used sources for all three categories. Health care professionals (such as a doctor or a nurse) (53%) are an important source for looking up information on non-prescription drugs. While general internet searches using a search engine are common, specific health-related websites (such as manufacturers' website, Health Canada's website, consumer group websites, etc.) are not commonly used by Canadians to look up product information.

As seen with knowledge and attitudes towards consumer health products, selection and usage of these products is predominantly affected by gender and age. Again, women and older Canadians (55+) both display similar tendencies: they are more likely to frequently use most types of products, search for product information about both safety and effectiveness and read several different parts of the labels on product packaging.

1.3. Methodology

An online panel survey was conducted among 2,502 Canadians age 18 years and older. A pre-test consisting of 10 completed English interviews and 10 completed French interviews, was completed before fielding the survey on April 15th, 2016. The survey was in field from April 18th to April 26th, 2016. Respondents for this survey were selected from among those who have registered to participate in the TNS online surveys. The results of such surveys cannot be described as statistically projectable to the target population. The data have been weighted to reflect the demographic composition of the Canadian population 18 years and older. As this was a panel survey, margin of error does not apply. Surveying was conducted in the respondent's official language of choice and took an average of 21 minutes to complete. A detailed methodology can be found in Chapter 4.

1.4. Contract Value

The total contract value for this project was \$44,547.82 including HST.

1.5. Statement of Political Neutrality

I hereby certify as Vice President, Ottawa Regional Office & Public Sector Practice Lead of TNS Canada Ltd. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences and standings with the electorate or ratings of the performance of a political party or its leaders.

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