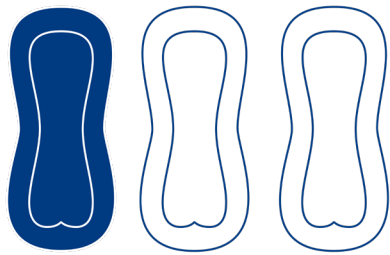


**UNDERSTANDING YOUR
CUSTOMER NEEDS**



**AND MAXIMISING
CUSTOMER SATISFACTION**

SIMPLIFYING CONTINENCE CARE FOR YOU AND YOUR CUSTOMERS



1 in 3 women experience bladder sensitivity and incontinence¹, but only 27% of them are using the right protection.

Prevalence of bladder weakness in the UK.

In the UK it is estimated that **between 3 and 6 million people experience some degree of urinary incontinence¹**. It is a condition that affects both men and women, and is also more common with increasing age.

Urinary incontinence can happen for a number of reasons and is more common than many people realise. As many as 1 in 3 women over the age of 35 and 1 in 4 men over the age of 40 experience bladder leakage². Additionally, many women are not currently using the right protection for their needs.

Only 27% use purpose made products specifically designed to handle bladder weakness², as many women use period products to manage their incontinence. The result is ineffective care, and a compromised quality of life.

A very relevant and growing category for pharmacies.

Bladder Weakness has a greater importance in the Pharmacy Channel due to the high level of education, advice and guidance required by the shopper/consumer. Equipping yourself with the right tools, products and merchandising for conversations on the topic will help generate greater customer satisfaction and loyalty. This document will help you capture this growth opportunity and help support your interactions with customers on the topic of continence care.

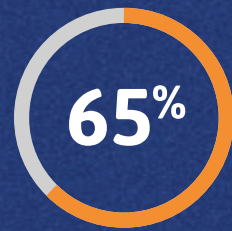
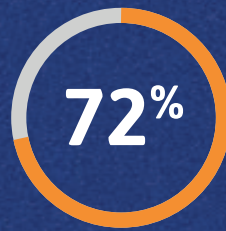
1. NHS Inform (2020) Urinary incontinence 2. Global Inco Consumer Segmentation study (2019) UK, GER, FR, US, ME



THE PRODUCTS FAMILY CAREGIVERS

REALLY VALUE

Research has shown that when it comes to continence care, shoppers prefer to go to pharmacies (where they have the option to speak to a knowledgeable expert) over and above other retailers.



72% of caregiver relatives and 65% of male and female shoppers prefer to shop in pharmacies³

Understanding how customers find the right product for their needs

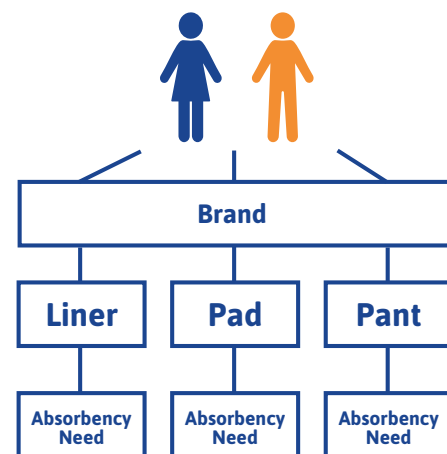
In the world of pharmacy, understanding and meeting the unique needs of your customers is the cornerstone of a successful business. By utilising consumer research and sales data, you can curate your product inventory to enhance customer satisfaction and foster the growth of your pharmacy.

To begin this journey, it's imperative to understand how consumers navigate the bladder weakness product range. Customers use the key leading brands in pharmacy as a beacon of trust and typically start their product search by identifying their preferred brand, followed by product format and then absorption level. Nielsen sales data in pharmacy also reveals that TENA dominates the bladder weakness category with an impressive 87% market share⁴. Always Discreet holds a 6% share of retail sales, while various smaller brands collectively constitute the remaining 7% of sales.

Delving deeper into the Bladder Weakness category, we see the majority of sales revenue, over half in fact, stems from the Pants format. This reflects a higher level of trust consumers place in healthcare professionals when dealing with more severe incontinence conditions. To be precise,

57% of incontinence sales are attributed to Pants, followed by 28% from pads, and a just 4% from Liners⁴. Moreover, the Men's category shows strong potential for growth within the pharmacy sector, boasting a remarkable growth rate of over 10% year on year⁴.

In light of this, it is essential to mirror this consumer preference in your fixture layout, aligning products with their respective subcategories. This strategy ensures your pharmacy is well-equipped to meet the needs of your customers effectively.



57% of incontinence sales come from pants
28% of sales come from pads
just 4% come from liners

³ Focaldata: UK, PO, IT, FR, 2022 ⁴ Source: Nielsen - data to WE 08.07.23

ARE YOU MAXIMISING

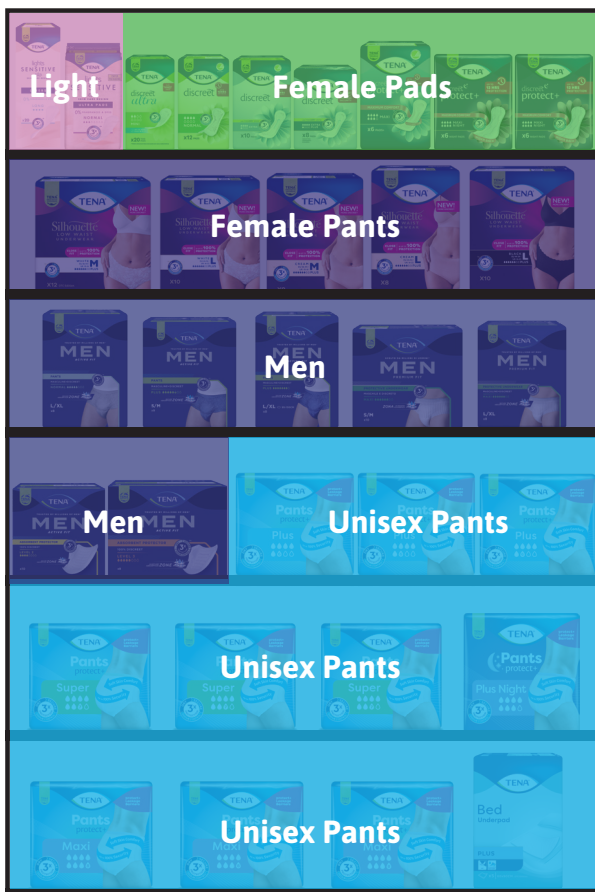
YOUR INCONTINENCE SPACE?

HOW TO DISPLAY YOUR PRODUCT RANGE TO MAXIMISE SALES

Your stock can be the most important financial asset to your business and implementing effective merchandising can deliver significant improvements to sales performance.

We want to help you provide an easy shopping layout for your customers, to ensure they can navigate your product display and find the right product for their needs.

We have created an easy-to-follow planogram that you can implement in your pharmacy, aligning product format and space to reflect their sales potential, as well as showing adjacent sub ranges for trade up opportunities. You can see this in the below example.



OUR STEP-BY-STEP GUIDE

We'll guide you through conversions around incontinence based on our knowledge of the topic and TENA's understanding of the different audiences who are in need of incontinence products. This conversation guide will follow four stages helping you effectively recommend TENA products to your shoppers based on their needs.

Our shoppers

Men buying for themselves

Women buying for themselves

Family carers buying for their loved ones

Our 4 stage process

1.

Identify shoppers
in need of help

2.

Reassure them that they're
not alone and there are
products for their needs

3.

Establish what lifestyle they
are buying products for

4.

Recommend

1.

Identify shoppers in need of help.

Whether shoppers are standing by the incontinence shelf, or actively approaching you for support, you can encourage a dialogue by asking a few simple questions.

Once you've established their answers to these initial questions, you'll be well placed to follow either of the following guides for Men, Women or Family Carers.

"Do you need help with what you're looking for today?"

"Are you buying the product for yourself or someone else?"

"Incontinence can be a daunting topic for many people - if it's helpful, I can tell you what I know and we can work out which products might be able to help... There are also leaflets on the shelf that you can read in your own time, if you'd rather"



2.

Reassure them that they're not alone and there are products for their needs.

Take the taboo out of incontinence and make your shoppers feel more comfortable talking to you, nurturing more loyal customers for your pharmacy.

FAMILY CARERS	MEN	WOMEN
<p>"You are not alone. 1 in 5 people globally are family carers."</p> <p>"Incontinence-related issues are very common amongst carers as well, as 1 in 3 women over 35 and 1 in 4 men over 40 suffer from bladder leakages."</p>	<p>"It's much more common than you think – 1 in 4 men over the age of 40 experience drips and dribbles. If this is something you need support with, then there are plenty of good TENA products for you use."</p>	<p>"You are not alone - as many as 1 in 3 women over the age of 35 have experienced bladder leaks."</p> <p>"It's very common for women to experience bladder leaks at particular moments throughout life, such as pregnancy, post-partum and during the menopausal years."</p>

3.

Establish what lifestyle they are buying products for.

Before recommending the right product, it's important to learn about the level of leaks of your shoppers, as well as when, where and what the product is needed for.

Level of leaks

FAMILY CARERS, MEN, AND WOMEN

What level of leakage do they/you experience (describe the amount – a few drops, or something more)?

Lifestyle

FAMILY CARERS

Which of their activities do they need protection for (e.g. out and about vs. at home vs. travelling)
How would you describe their level of mobility? Are they dependent on others to change them?

MEN AND WOMEN

Describe a typical day for you (e.g. exercise, eating and drinking habits, bowel habits)
Which of your activities do you most need protection for (e.g. out and about vs. at home vs. travelling)

When do leaks occur

FAMILY CARERS

When do their leakages generally happen? (i.e. Day or night?) Does this vary?
Is it a rush to get them to the toilet in time or frequent toilet visits (day time or night time)?

MEN AND WOMEN

When do your leakages generally happen? Day or night? Does this vary?
Are leaks more likely to happen where you're exerting yourself - like when you cough, or sneeze, laugh, or do certain physical activity like lifting weights or running?
Is it a rush to get to the toilet in time or frequent toilet visits (day time or night time)?

4.

Recommend.

Based on your shoppers' needs, there are several resources that allow you to recommend the right product.

TENA droplet system



Different products for day and night



Skin health products





KNOWLEDGE EQUALS CONFIDENCE

HERE ARE SOME ADDITIONAL TIPS TO DRIVE CUSTOMER LOYALTY

SIMPLIFYING THE SHOPPING EXPERIENCE

- Make products easy to find in the store and consider displaying products alongside other products that can benefit their situation (e.g. moisturizers or creams for improved skin health).
- Run in-store campaigns to improve product visibility and category awareness.

WIDER HEALTH TIPS RELATING TO URINE LEAKAGE

- Be observant of medical conditions that can cause urinary symptoms: diabetes, stroke, Parkinson's disease and Multiple Sclerosis are a few examples. Always refer them to a healthcare professional to get a proper diagnosis and information on how to manage and treat the issue.
- Caffeine and alcohol reduction have a range of additional benefits, beyond helping reduce the occurrence of leaks.
- Remember to recommend drinking enough water – dehydration concentrates urine, which can promote an overactive bladder.
- Avoid drinking two hours before bedtime to help minimize night-time urination.
- Maintaining a healthy body weight and exercising regularly can help improve bladder health, as they encourage regular bowel movements, and help manage stress levels and psychological well-being.
- Some medications can also cause side effects that affect the bladder and bowel, so understanding what medication the shopper is on is also important.

WIDER SKIN HEALTH TIPS

- Keeping the skin clean prevents irritations – for sensitive skin you can use barrier creams for protection.



TRUSTED BY MILLIONS*

THE WORLD'S NO.1
BLADDER LEAK PROTECTION BRAND**

Source: *trusted by millions' is a global figure based on Kantar studies data on trust and usage as well as market shares and buyer data.
**Worlds No.1: Euromonitor International limited; Retail Adult Incontinence, all channels RSP value sales, Tissue & Hygiene, 2023 edition. (excluding institutional).