

2023 Phenylephrine Consumer Survey

National Consumer Survey on Phenylephrine (PE)

Key Findings – August 3, 2023

Consumer Healthcare Products Association (CHPA)
www.chpa.org

2023 Phenylephrine Consumer Survey

Methods

- Cross-sectional survey of American adult consumers
- Examine PE awareness, experiences with effectiveness, attitudes
- Online survey instrument, 15 questions
- Oversamples for ages 50+, rural
- Screener: age 21+ and must report having used any OTC medicine with oral PE in the past 12 months
- n=1,200 (margin of error +/- 2.83, 95% confidence level)
- Fielded: July 24-28, 2023 – The Bullfinch Group on behalf of CHPA

2023 Phenylephrine Consumer Survey

Overall Respondents (*Subgroup Analysis*)

- 83% - Medicines with PE help relieve my nasal congestion (*86% among ages 65+*)
- 78% - Sometimes I need relief from mild/moderate symptoms
- 69% - Mild/moderate congestion has a negative effect on my daily activities, sleep, and work (*72% among ages 65+ and 74% among rural*)

2023 Phenylephrine Consumer Survey


Overall Respondents (*Subgroup Analysis*)

- 66% - PE helps me get through my day because it relieves my nasal congestion (*71% among ages 50+ and 70% among rural*)
- 63% - Have used PE 3x or more in the past 12 months
- 25% - Have used PE 5x or more in the past 12 months (*30% among ages 65+, and 29% among rural*)

2023 Phenylephrine Consumer Survey

“If [oral PE] were no longer available, what would you do instead if you had nasal or sinus congestion...”

- 42% - I would seek a behind-the-counter decongestant
- 39% - I would make an appointment with a doctor
- 26% - I would go to a clinic or urgent care
- 14% - I would go without treatment



Note: These three actions represent an additional **burden on the consumer and a burden on the healthcare system** overall, requiring engagement with a pharmacist, doctor, or other healthcare provider.

2023 Phenylephrine Consumer Survey

Findings Summary

- American adults **repeatedly rely on oral PE** because they **recognize its efficacy** as a nasal decongestant, they see the **physical and personal benefits** of oral PE when they use it, and they – and the overall healthcare system – **would be significantly burdened** if oral PE were not available OTC.
- This is especially true among **older adults** and people living in **rural** communities.

CHPA Phenylephrine (PE) Nationwide Consumer Study

Online survey among n1200 U.S. Adults (21 or older) who have used any OTC medicine containing an oral decongestant in the past 12 months, that did not require an ID to purchase.

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OVERALL TOPLINE RESULTS

CHPA Phenylephrine (PE) Nationwide Consumer Study

Field Dates: 07/24-28/2023

Margin of error among n1200 U.S. Adults (21 or older): ± 2.83

You have been selected to participate in a survey on a confidential basis. This is a rare opportunity to voice your opinions. Your responses will be kept confidential; you are not being asked to buy anything or donate money. We simply want to know what you think and how you feel.

A. Are you, or is anyone in your household, employed by the news media or a market research firm?

100% No (**continue**)

Screener Section

S1. Are you currently 21 years old or older?

100% Yes (**continue**)

S2. Do you consider yourself to be of Hispanic or Latino descent, such as Mexican, Puerto Rican, Cuban, or some other Central or Latin American background?

17% Yes

82% No

1% Unsure

S3. Would you best describe the neighborhood or area you live in as...

36% Urban

31% Suburban

30% Rural

3% Unsure

S4. In the past 12 months, have you used any medicine that you can buy without a prescription (also known as "over-the-counter" or "OTC" medicine) that you take by mouth that includes treatment for symptom relief of nasal or sinus congestion due to a cold or nasal allergies (often referred to as a "stuffy nose")?

(Examples include Sudafed PE Sinus Congestion or Sinus Pressure; Advil Sinus; Benadryl Allergy PLUS Congestion; NyQuil Severe Cold & Flu; Mucinex Sinus, Congestion, or Nightshift; Tylenol Sinus or Cold & Flu; Theraflu, as well as similar store brands, to name a few.)

100% Yes (**continue**)



Awareness Section

AW1. How familiar are you with decongestant ingredients in over-the-counter (OTC) medicines that help relieve nasal or sinus congestion or pressure (stuffy nose)? **(ROTATE 1-4,4-1)**

80% Total Familiar

42% Very familiar
38% Somewhat familiar

17% Total Unfamiliar

9% Somewhat unfamiliar
8% Very unfamiliar

2% Unsure

AW2. Are you aware that there are two types of nasal decongestants available in over-the-counter (OTC) medicines: one that requires an ID to buy at the pharmacy (pseudoephedrine [PSE]) and one that does not require an ID to purchase (phenylephrine [PE])?

72% Yes
28% No

The remaining set of questions are about medicines that contain the nasal/sinus decongestant phenylephrine (PE) that you can purchase over-the-counter (OTC) without needing to show an ID and which you take orally (by mouth). Examples include Sudafed PE Sinus Congestion or Sinus Pressure; Advil Sinus; Benadryl Allergy PLUS Congestion; NyQuil Severe Cold & Flu; Mucinex Sinus, Congestion, or Nightshift; Tylenol Sinus or Cold & Flu; Theraflu, as well as similar store brands, to name a few.

AW3. How many times in the past 12 months would you say you used an OTC medicine that you took by mouth that includes a treatment for symptom relief of nasal or sinus congestion or pressure (stuffy nose)?

28% 1-2 times
38% 3-4 times
25% 5 times or more

9% Do not recall / unsure

Effectiveness and Satisfaction Section

ES1. In your own experience with OTC medicines containing decongestants that are available without an ID, do you think they help relieve your nasal or sinus congestion or pressure (stuffy nose)?

- 83% Yes, they help
 - 8% No, they do not help

 - 9% Unsure
-

(ASK IF '1: Yes, they help' IN PREVIOUS QUESTION)

ES2. What are the main benefits you associate with using OTC medicines containing decongestants that are available without an ID, to help relieve your nasal or sinus congestion or pressure (stuffy nose)? (SELECT ALL THAT APPLY)

(ALLOW FOR MULTIPLE SELECTIONS) (RANDOMIZE 1-6)

(n990)

- 66% Helps me get through my day because it relieves my nasal congestion (stuffy nose)
 - 57% Easy to find, available everywhere
 - 53% Helps me sleep because it relieves my nasal congestion (stuffy nose)
 - 51% They are safe and effective at relieving my nasal congestion (stuffy nose)
 - 49% No doctor visit required to access and use
 - 29% No ID required to purchase
 - 0% Other (please specify): open-ended
-

(ASK ALL)

ES3. Think back to the most recent time you or a family member had nasal or sinus congestion or pressure (stuffy nose) and used an OTC medicine, that did not require an ID to buy, to help relieve symptoms. How satisfied were you or your family member with the medicine to relieve nasal or sinus congestion or pressure (stuffy nose)? **(ROTATE 1-5,5-1)**

6% Total Dissatisfied
2% Extremely dissatisfied
4% Somewhat dissatisfied

15% Neutral

79% Total Satisfied
37% Somewhat satisfied
42% Extremely satisfied

Attitude and Perception Section

AP1. Phenylephrine (PE) is the only over-the-counter (OTC) nasal/sinus decongestant ingredient taken by mouth that is available on the market without requiring an ID. If this ingredient were no longer available, what would you do instead if you had nasal or sinus congestion or pressure (stuffy nose)? (SELECT ALL THAT APPLY)

(ALLOW FOR MULTIPLE SELECTIONS) (RANDOMIZE 1-7)

- 42% Ask the pharmacist for a different “behind-the-counter” decongestant that requires an ID
 - 39% Make an appointment to visit my doctor
 - 35% Switch to a nasal decongestant spray
 - 26% Go to urgent care or a health clinic
 - 24% Use comfort measures such as cold compresses or other
 - 21% Seek herbal, natural, or non-medical care such as acupuncture / acupuncture
 - 14% Go without any treatment

 - 6% Don't know
 - 0% Other (please specify): open-ended
-

Please read the following statements and indicate (ROTATE) disagree or agree (END ROTATE) with each.

AP2. I really need to have a pill or medicine for clearing my nasal or sinus congestion or pressure (stuffy nose) that I can buy without a prescription or without showing my ID.

- 19% Total Disagree**
 - 6% Strongly Disagree
 - 13% Disagree

 - 26% Neutral

 - 55% Total Agree**
 - 35% Agree
 - 20% Strongly Agree
-

AP3. I would be worried if the only medicine for clearing nasal or sinus congestion or pressure (stuffy nose) that you can buy without showing your ID is no longer available.

- 20% Total Disagree**
 - 7% Strongly Disagree
 - 14% Disagree

 - 27% Neutral

 - 53% Total Agree**
 - 34% Agree
 - 18% Strongly Agree
-

AP4. Even mild or moderate nasal or sinus congestion or pressure (stuffy nose) can have a negative effect on my daily activities, sleep, and work.

13% **Total Disagree**
5% Strongly Disagree
7% Disagree

18% Neutral

69% **Total Agree**
46% Agree
24% Strongly Agree

AP5. Sometimes I need relief for mild or moderate symptoms of nasal or sinus congestion or pressure (stuffy nose).

7% **Total Disagree**
3% Strongly Disagree
4% Disagree

15% Neutral

78% **Total Agree**
54% Agree
24% Strongly Agree

AP6. Sometimes I only need temporary relief for mild or moderate symptoms of nasal or sinus congestion or pressure (stuffy nose).

10% **Total Disagree**
4% Strongly Disagree
6% Disagree

16% Neutral

74% **Total Agree**
55% Agree
19% Strongly Agree

Demographic Section

Now just a few questions to make sure we have a representative sample –

Registration: Are you currently registered to vote?

82%	Yes
18%	Not currently registered

Gender: Your gender identification?

62%	Female
38%	Male
0%	Other

DoB: In what year were you born?

Age Range: **IF UNSURE OR REFUSED, ASK:** Which of the following categories best describes your age?

7%	21 to 24
10%	25 to 29
38%	30 to 39
21%	40 to 49
17%	50 to 64
9%	65 or older

Race: And which of the following best describes your racial background?

71%	White or Caucasian
15%	Black or African American
10%	Hispanic
2%	Asian or Pacific Islander
2%	Native American
1%	Other

Education: What is the highest level of formal education that you have completed?

5%	Less than high school
26%	High school graduate
22%	Some college
9%	College graduate with associate or 2-year degree
16%	College graduate with bachelor's or 4-year degree
17%	Post-graduate degree
5%	Technical or vocational school graduate
0%	Unsure

Occupation Please describe your current occupational status.

13%	Employed by the government
38%	Employed in the private sector
7%	Small Business owner
2%	Student
8%	Homemaker
10%	Retired
11%	Unemployed
11%	Other
1%	Unsure

Marital Status What would best describe your marital status?

34%	Single or never married
46%	Married
3%	Separated
10%	Divorced
5%	Widowed
2%	Other

Children Do you have children currently living in your household?

53%	Yes
46%	No
0%	Refused

CHPA Phenylephrine (PE) Nationwide Consumer Study

Online survey among n1200 U.S. Adults (21 or older) who have used any OTC medicine containing an oral decongestant in the past 12 months, that did not require an ID to purchase.

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CROSSTAB TOPLINE RESULTS: AGES 50+ AND RURAL COMPARED TO OVERALL

CHPA Phenylephrine (PE) Nationwide Consumer Study

Field Dates: 07/24-28/2023

Margin of error among n1200 U.S. adults (21 or older): ± 2.83

Margin of error among n306 U.S. adults (50 or older): ± 5.6

Margin of error among n357 rural U.S. adults: ± 5.19

You have been selected to participate in a survey on a confidential basis. This is a rare opportunity to voice your opinions. Your responses will be kept confidential; you are not being asked to buy anything or donate money. We simply want to know what you think and how you feel.

A. Are you, or is anyone in your household, employed by the news media or a market research firm?

Total	50+	Rural	
100%	100%	100%	No (continue)

Screener Section

S1. Are you currently 21 years old or older?

Total	50+	Rural	
100%	100%	100%	Yes (continue)

S2. Do you consider yourself to be of Hispanic or Latino descent, such as Mexican, Puerto Rican, Cuban, or some other Central or Latin American background?

Total	50+	Rural	
17%	11%	7%	Yes
82%	89%	92%	No
1%	0%	0%	Unsure

S3. Would you best describe the neighborhood or area you live in as...

Total	50+	Rural	
36%	20%	0%	Urban
31%	38%	0%	Suburban
30%	40%	100%	Rural
3%	0%	0%	Unsure

S4. In the past 12 months, have you used any medicine that you can buy without a prescription (also known as "over-the-counter" or "OTC" medicine) that you take by mouth that includes treatment for symptom relief of nasal or sinus congestion due to a cold or nasal allergies (often referred to as a "stuffy nose")?

(Examples include Sudafed PE Sinus Congestion or Sinus Pressure; Advil Sinus; Benadryl Allergy PLUS Congestion; NyQuil Severe Cold & Flu; Mucinex Sinus, Congestion, or Nightshift; Tylenol Sinus or Cold & Flu; Theraflu, as well as similar store brands, to name a few.)

Total	50+	Rural	
100%	100%	100%	Yes (continue)

Awareness Section

AW1. How familiar are you with decongestant ingredients in over-the-counter (OTC) medicines that help relieve nasal or sinus congestion or pressure (stuffy nose)? **(ROTATE 1-4,4-1)**

Total	50+	Rural	
80%	81%	80%	Total Familiar
42%	37%	36%	Very familiar
38%	44%	44%	Somewhat familiar
17%	18%	18%	Total Unfamiliar
9%	10%	10%	Somewhat unfamiliar
8%	8%	8%	Very unfamiliar
2%	2%	2%	Unsure

AW2. Are you aware that there are two types of nasal decongestants available in over-the-counter (OTC) medicines: one that requires an ID to buy at the pharmacy (pseudoephedrine [PSE]) and one that does not require an ID to purchase (phenylephrine [PE])?

Total	50+	Rural	
72%	71%	73%	Yes
28%	29%	27%	No

The remaining set of questions are about medicines that contain the nasal/sinus decongestant phenylephrine (PE) that you can purchase over-the-counter (OTC) without needing to show an ID and which you take orally (by mouth). Examples include Sudafed PE Sinus Congestion or Sinus Pressure; Advil Sinus; Benadryl Allergy PLUS Congestion; NyQuil Severe Cold & Flu; Mucinex Sinus, Congestion, or Nightshift; Tylenol Sinus or Cold & Flu; Theraflu, as well as similar store brands, to name a few.

AW3. How many times in the past 12 months would you say you used an OTC medicine that you took by mouth that includes a treatment for symptom relief of nasal or sinus congestion or pressure (stuffy nose)?

Total	50+	Rural	
28%	33%	29%	1-2 times
38%	26%	31%	3-4 times
25%	28%	29%	5 times or more
9%	12%	11%	Do not recall / unsure

Effectiveness and Satisfaction Section

ES1. In your own experience with OTC medicines containing decongestants that are available without an ID, do you think they help relieve your nasal or sinus congestion or pressure (stuffy nose)?

Total	50+	Rural	
83%	82%	80%	Yes, they help
8%	7%	10%	No, they do not help
9%	11%	10%	Unsure

(ASK IF '1: Yes, they help' IN PREVIOUS QUESTION)

ES2. What are the main benefits you associate with using OTC medicines containing decongestants that are available without an ID, to help relieve your nasal or sinus congestion or pressure (stuffy nose)? (SELECT ALL THAT APPLY)

(ALLOW FOR MULTIPLE SELECTIONS) (RANDOMIZE 1-6)

Total (n990)	50+ (n250)	Rural (n285)	
66%	71%	70%	Helps me get through my day because it relieves my nasal congestion (stuffy nose)
57%	58%	58%	Easy to find, available everywhere
53%	52%	55%	Helps me sleep because it relieves my nasal congestion (stuffy nose)
51%	57%	52%	They are safe and effective at relieving my nasal congestion (stuffy nose)
49%	58%	57%	No doctor visit required to access and use
29%	35%	32%	No ID required to purchase
0%	1%	0%	Other (please specify): open-ended

(ASK ALL)

ES3. Think back to the most recent time you or a family member had nasal or sinus congestion or pressure (stuffy nose) and used an OTC medicine, that did not require an ID to buy, to help relieve symptoms. How satisfied were you or your family member with the medicine to relieve nasal or sinus congestion or pressure (stuffy nose)? **(ROTATE 1-5,5-1)**

Total	50+	Rural	
6%	7%	11%	Total Dissatisfied
2%	3%	5%	Extremely dissatisfied
4%	5%	7%	Somewhat dissatisfied
15%	13%	15%	Neutral
79%	80%	74%	Total Satisfied
37%	41%	40%	Somewhat satisfied
42%	39%	34%	Extremely satisfied

Attitude and Perception Section

AP1. Phenylephrine (PE) is the only over-the-counter (OTC) nasal/sinus decongestant ingredient taken by mouth that is available on the market without requiring an ID. If this ingredient were no longer available, what would you do instead if you had nasal or sinus congestion or pressure (stuffy nose)? (SELECT ALL THAT APPLY)

(ALLOW FOR MULTIPLE SELECTIONS) (RANDOMIZE 1-7)

Total	50+	Rural	
42%	41%	41%	Ask the pharmacist for a different “behind-the-counter” decongestant that requires an ID
39%	39%	36%	Make an appointment to visit my doctor
35%	36%	38%	Switch to a nasal decongestant spray
26%	13%	18%	Go to urgent care or a health clinic
24%	13%	19%	Use comfort measures such as cold compresses or other
21%	13%	20%	Seek herbal, natural, or non-medical care such as acupressure / acupuncture
14%	11%	15%	Go without any treatment
6%	6%	5%	Don't know
0%	1%	1%	Other (please specify): open-ended

Please read the following statements and indicate (ROTATE) disagree or agree (END ROTATE) with each.

AP2. I really need to have a pill or medicine for clearing my nasal or sinus congestion or pressure (stuffy nose) that I can buy without a prescription or without showing my ID.

Total	50+	Rural	
19%	19%	17%	Total Disagree
6%	5%	5%	Strongly Disagree
13%	14%	12%	Disagree
26%	22%	30%	Neutral
55%	58%	53%	Total Agree
35%	41%	35%	Agree
20%	17%	18%	Strongly Agree

AP3. I would be worried if the only medicine for clearing nasal or sinus congestion or pressure (stuffy nose) that you can buy without showing your ID is no longer available.

Total	50+	Rural	
20%	19%	20%	Total Disagree
7%	5%	7%	Strongly Disagree
14%	14%	12%	Disagree
27%	28%	27%	Neutral
53%	53%	53%	Total Agree
34%	34%	35%	Agree
18%	20%	18%	Strongly Agree

AP4. Even mild or moderate nasal or sinus congestion or pressure (stuffy nose) can have a negative effect on my daily activities, sleep, and work.

Total	50+	Rural	
13%	13%	11%	Total Disagree
5%	4%	5%	Strongly Disagree
7%	10%	6%	Disagree
18%	18%	15%	Neutral
69%	69%	74%	Total Agree
46%	50%	49%	Agree
24%	19%	25%	Strongly Agree

AP5. Sometimes I need relief for mild or moderate symptoms of nasal or sinus congestion or pressure (stuffy nose).

Total	50+	Rural	
7%	7%	7%	Total Disagree
3%	2%	3%	Strongly Disagree
4%	5%	4%	Disagree
15%	10%	14%	Neutral
78%	82%	79%	Total Agree
54%	64%	56%	Agree
24%	19%	22%	Strongly Agree

AP6. Sometimes I only need temporary relief for mild or moderate symptoms of nasal or sinus congestion or pressure (stuffy nose).

Total	50+	Rural	
10%	7%	12%	Total Disagree
4%	3%	5%	Strongly Disagree
6%	4%	7%	Disagree
16%	11%	16%	Neutral
74%	81%	73%	Total Agree
55%	63%	54%	Agree
19%	18%	18%	Strongly Agree

Demographic Section

Now just a few questions to make sure we have a representative sample –

Registration: Are you currently registered to vote?

Total	50+	Rural	
82%	87%	77%	Yes
18%	13%	23%	Not currently registered

Gender: Your gender identification?

Total	50+	Rural	
62%	81%	80%	Female
38%	19%	20%	Male
0%	0%	0%	Other

DoB: In what year were you born?

Age Range **IF UNSURE OR REFUSED, ASK:** Which of the following categories best describes your age?

Total	50+	Rural	
7%	0%	6%	21 to 24
10%	0%	9%	25 to 29
38%	0%	27%	30 to 39
21%	0%	24%	40 to 49
17%	66%	24%	50 to 64
9%	34%	10%	65 or older

Race: And which of the following best describes your racial background?

Total	50+	Rural	
71%	75%	79%	White or Caucasian
15%	11%	13%	Black or African American
10%	9%	5%	Hispanic
2%	1%	0%	Asian or Pacific Islander
2%	2%	2%	Native American
1%	1%	1%	Other

Education: What is the highest level of formal education that you have completed?

Total	50+	Rural	
5%	4%	7%	Less than high school
26%	26%	36%	High school graduate
22%	25%	26%	Some college
9%	15%	10%	College graduate with associate or 2-year degree
16%	16%	10%	College graduate with bachelor's or 4-year degree
17%	7%	5%	Post-graduate degree
5%	6%	6%	Technical or vocational school graduate
0%	0%	0%	Unsure

Occupation Please describe your current occupational status.

Total	50+	Rural	
13%	5%	9%	Employed by the government
38%	26%	28%	Employed in the private sector
7%	6%	6%	Small Business owner
2%	1%	2%	Student
8%	8%	15%	Homemaker
10%	36%	14%	Retired
11%	9%	13%	Unemployed
11%	10%	12%	Other
1%	0%	1%	Unsure

Marital Status What would best describe your marital status?

Total	50+	Rural	
34%	18%	32%	Single or never married
46%	39%	40%	Married
3%	4%	3%	Separated
10%	23%	15%	Divorced
5%	15%	8%	Widowed
2%	1%	2%	Other

Children Do you have children currently living in your household?

Total	50+	Rural	
53%	26%	45%	Yes
46%	74%	55%	No
0%	0%	0%	Refused