

Bepanthen[®]

**CONSUMER SHOPPER
JOURNEY
NAPPY RASH FRANCE**



The CSJ is built on the design target

Novice Mum

13% of mums in FR in a given year are Novice Mums

It is the strategic focus for the brand → **objective is to get them to choose Bepanthen early stage and establish the brand as their first choice**

Pro Mum

87% of mums in FR in a given year are Pro Mums

3 Distinctive Personas

Focus to Novice with a child and Pro Mum

Novice Mum



13%

Woman aged 18+, first time mum with a child aged 0-12 months, currently wearing nappies, having purchased and used a nappy rash product P12M

Carine



0.05%

Woman aged 18+, pregnant with her first child & in the 3rd trimester

Julie

Pro Mum



87%

Woman aged 18+, first time mum with a child above 12m, currently wearing nappies, having purchased and used a nappy rash product P12M

Marie

OR

pregnant with her second child & in the 3rd trimester

OR

mum with child of any age and a second child aged 0-36 months, wearing nappies, having purchased and used a nappy rash product P12M



Profile of consumer who take this journey:

**Carine, 30 years old
Novice Mum with baby**



WHO WE ARE

- 11% 18 – 25 y.o.
- 71% 26 – 34 y.o.
- 19% 35 - 50 y.o.



WHAT DOES SHE FEEL

- She feels uncomfortable about the condition, but knows it is common (41%)
- Rashes create a feeling of guilt because their appearance is strongly related to the insufficient care in changing diapers
- Feels worried and anxious (26%)
- It affects her confidence (26%)



WHAT DOES SHE THINK

- She thinks that it's easy to solve and should not be embarrassed about (71%)



WHAT DOES SHE SAY

- It bothers her a lot. She does not know what to do (84%)



WHAT DOES SHE DO

- Buying for the first time NR products (24%) vs. repeating purchase (76%)
- In the case of repeat purchase, she buys NR products frequently (5.5% every 2-3 weeks, 28% once a month, 28% every 2-3 months, 13% every 4-6 months, 2% every 7-12 months)
- Diaper rash cream usage is very often (34% several times a day but not in every diaper change)



WHAT ARE HER CONCERNS

- She really doesn't want to lose her identity and believes she needs to preserve her achievements (work, hobbies and free time)
- Believes it is important to balance her different roles: mother, wife and professional



WHAT ARE HER NEEDS

- To have good health, physical condition, energy to face childbirth and the few hours of sleep
- Safety: to feel safe, supported, not to be alone
- To know how to take good care of her baby
- Making informed decision by having sufficient information on the category
- Finding the best product for her needs from a variety of options available



WHO INFLUENCES HER

- Family and friends (71%)
- HCPs: Ped/Pharmacist (68%)
- Online (47%)



WHERE DOES SHE SHOP

- 84% Pharmacy
- 24% Parapharmacy
- 6% Online
- 3% Supermarket



WHAT BRANDS DOES SHE USE

- Bepanthen Pommade 43%
- Mustela 21%
- Avène Cicalfate 16%
- Mitosyl 13%
- Weleda Calendula 10%

Profile of consumer who take this journey:

Carine, 30 years old
Novice Mum with baby



SMARTPHONE IS HER ALLY

- Uses Facebook and Instagram at least several times a week (81% and 53% respectively)
- Regularly spends time reading news, checking weather (61%) and playing games (45%)
- Occasionally using Health & Wellness (44%), Fitness and Travel apps (43%)

SIMPLE THINGS MATTER!

ENVIRONMENTALLY CONSCIOUS

- The environment is important to her and she does everything she can to limit her impact on the environment (75%)
- Tries to buy locally produced and organic products even if they cost more (55%)



PRECIOUS MOMENTS

- Going out to a shopping center is a pleasure and is part of a leisure experience (68%)
- Holidays and international travel are important to her (62%)



NOWHERE LIKE HOME

- She cooks at home (73%). Regularly looking for new recipe ideas (78%)
- Likes watching TV (71%)
- Socializing is important to her (70%), but she does not often get the opportunity to go out
- Frequently inviting friends for dinner at home



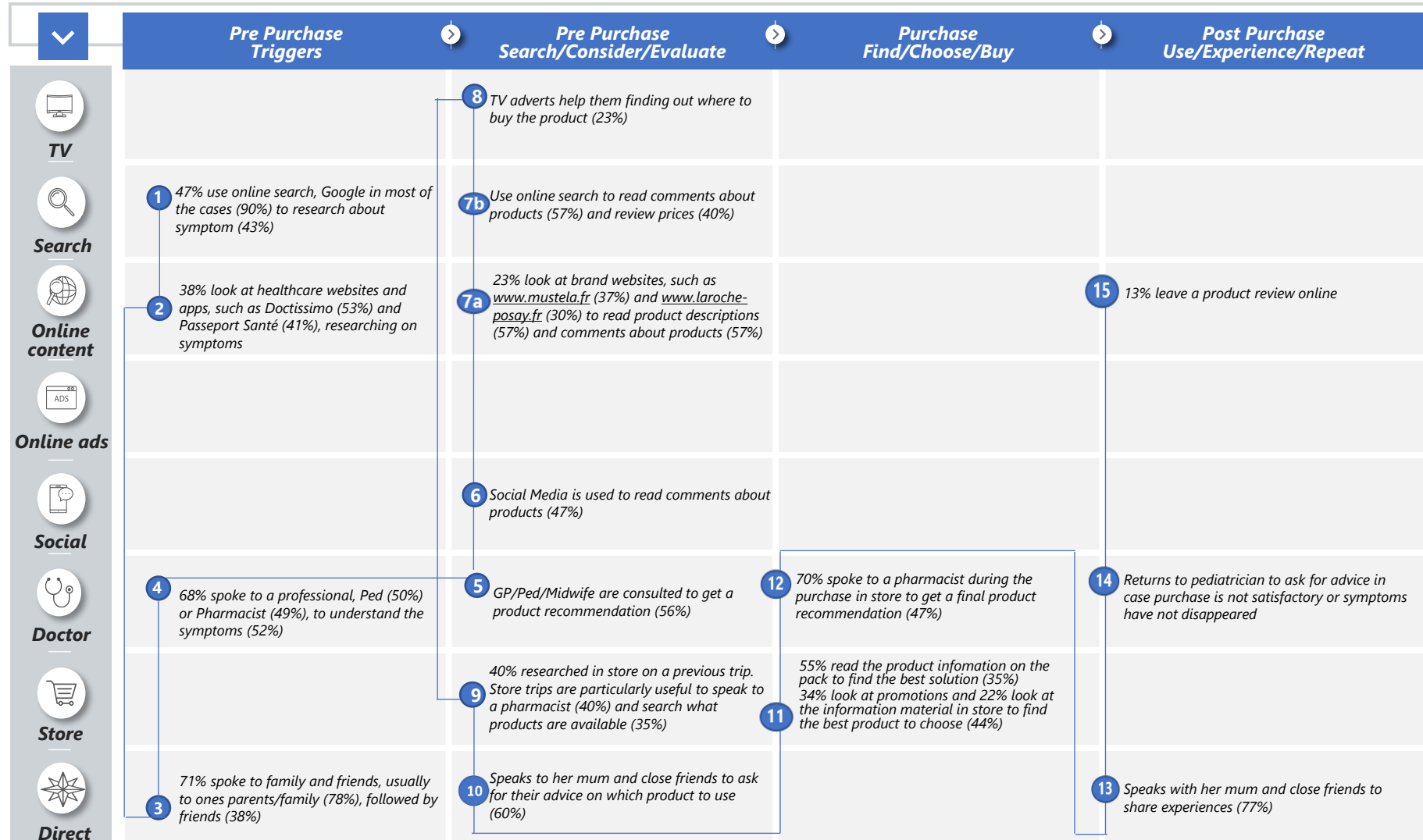
NAPPY RASH FRANCE

THE CONSUMER SHOPPER JOURNEY NOVICE MUM WITH BABY

	Pre Purchase Triggers	Pre-Purchase Search / Consider / Evaluate	Purchase Find / Choose / Buy	Post Purchase Use / Experience / Repeat
Doing	<ul style="list-style-type: none"> Triggers: in contact with a full diaper for too long, not using NR cream in all diaper changes, using poor quality NR cream and diaper Main symptoms: skin becomes red, sometimes has blisters, baby crying and having a hard time to sleep Becomes alerted when she diagnoses NR. Discusses with Ped (41%), speaks with the pharmacist (23%), starts to search on the internet (24%), speaks with friends and family (20%) 	<ul style="list-style-type: none"> 68% speak to a professional: <ul style="list-style-type: none"> To know which product to use (58%) To get a product recommendation (56%) To understand the symptoms (52%) 74% search online: <ul style="list-style-type: none"> To read comments about products (57%) To research symptoms/ issues (43%) To review prices (40%) 	<ul style="list-style-type: none"> 57% go to the store having specific brand in mind 19% have another brand in mind when get to the store, but choose something else 16% have multiple brands in mind and make up their mind in the store 9% do not think of any brands and make up their mind when in store 	<ul style="list-style-type: none"> 14% use NR product at every diaper change, 34% several times a day but not in every diaper change, 19% several times a week, 12% once a day 22% search for usage instructions, 13% for dosage and 15% for ingredients. 52% does not do any further research after purchasing Purchase is done, but sometimes it is not satisfactory, causing frustrations, so she returns to HCPs for more advices 13% of users leave a review after use. Of those, 35% leave the review on a product comparison website
Touchpoints	<ul style="list-style-type: none"> HCP (Ped 41%, Pharmacist 23%) Online (consumer reviews, SE) (24%) Friends and family (20%) 	<ul style="list-style-type: none"> Friends (28%) Pharma (35%) Relative (59%) GP (31%) Google (44%) Ped (36%) TV (24%) FB (20%) Midwife (15%) Magazine (8%) 	<ul style="list-style-type: none"> HCPs (70%) (Pharma 66%, GP 40%, Ped 51%, Midwife 31%) Product Info/Pack (55%) In store (Promo 34%, POS 22%) 	<ul style="list-style-type: none"> Online Search (17%) Online Reviews (33%) Relatives (17%) Ped/GP (17%)
Gains	<ul style="list-style-type: none"> Take care of her baby's skin; Reduce any discomfort caused by NR; Stop NR from getting worse; Identify cause & how it can be avoided 	<ul style="list-style-type: none"> Brand with high affinity and brand awareness BPN Pommade is considered different vs. other brands of the category (61%). Meeting consumer main needs (79%) Understanding the condition and which product to use, gives her a sense of control 	<ul style="list-style-type: none"> High brand recommendation rate by Peds and Pharmacists Considered very effective The best product for her beloved child that will keep her baby far from nappy rash 	<ul style="list-style-type: none"> Easy to use (80%) Fully meets her needs (76%) Get rid of symptoms and relief her baby
Pains	<ul style="list-style-type: none"> Overwhelmed and confused, as all is new to her, feeling anxiety, concern and fear 	<ul style="list-style-type: none"> Using TV, Online, Print advertising for product search and evaluation does not meet her expectations (45%) 	<ul style="list-style-type: none"> Concerned if product will work and deliver fast acting, long lasting Poor visibility on shelf (13%) In store, can be considered same as other brands but at higher price (9%) 	<ul style="list-style-type: none"> Several creams have a sticky texture, not easily absorbed by the baby's skin It is not considered natural (10%), reducing frequency of usage to treatment only occasions
Insights / Why	<ul style="list-style-type: none"> Aware of nappy rash, based on what she has heard from friends/family & her own search She needs advice on the right product usage methods, dosage and routines 	<ul style="list-style-type: none"> As she has received nappy rash creams as gifts in the maternity ward, she does not go and buy a product directly when baby is born and nappy rash occurs She feels more negative emotions in the initial phase, but then starts feeling better later on in the journey Only 5% of Mums do not do research before arriving to store Search Hierarchy: Product ingredients 29%, Brand 22%, Benefit 20%, Pack size 18%, Price 9% 	<ul style="list-style-type: none"> Most shoppers are buying instore 97%. 84% buy in pharmacy, 24% in drugstore, 3% in supermarket The main drivers of store choice are trust and professional advice Reasons for purchase: 55% needed product immediately, 22% to stock up, 20% exploring new products Purchase Decision Hierarchy: Benefit 35%, Product Ingredients 30%, Brand 15%, Pack Size 10%, Price 8% 	<ul style="list-style-type: none"> Bepanthen Pommade used mainly for treatment vs. prevention 50% of users say the product is extremely easy to use. 26% claim it is fairly easy and 13% say it is difficult to use 75% say the brand fully met their needs. 20% say the brand partially met their needs
Implications for brand	<ul style="list-style-type: none"> Build partnerships with Peds & Pharmacists as they play a key role in product recommendation Target Family/Friends of Novice Mums to become the NR brand of choice 	<ul style="list-style-type: none"> Target online forums and blogs to increase brand recommendation Generate WOM through friends and family Help consumers navigate through the sea of information having a strong HHH content model, ensuring good quality scores and search ranking on Google 	<ul style="list-style-type: none"> Further reinforce product superiority, emphasizing on fast acting and long lasting benefits, to improve value equation Provide free samples and educational content in Ped offices and Pharmacies to reinforce medical credibility and drive value equation Ensure visibility is optimized through pack redesign and explore special displays as a way to demonstrate category leadership 	<ul style="list-style-type: none"> Reinforce product goodness (e.g. through breathability and small number of ingredients) to increase usage frequency Ensure pack provides clear and detailed explanation on usage instructions and ingredients Encourage positive product reviews & engage with users online

NAPPY RASH FRANCE

THE CONSUMER SHOPPER JOURNEY NOVICE MUM WITH BABY



CSJ Key Conclusions & Leverage Points

Overall priority (1-2-3-x)	Key conclusions: opportunities to leverage/ barriers to overcome	Task for the brand	Touchpoint to be leveraged	Impact on Bepanthen (high-med-low)	Ability to implement (high-med-low)
4	Becomes alerted when she diagnoses NR. Discusses with Ped (41%), speaks with the pharmacist (23%)	Build partnerships with Peds & Pharmacists as they play a key role in product recommendation	Pediatrcian & Pharmacists	H	M
2	74% search online Search Hierarchy: Product ingredients 71%, Brand 62%, Benefit 56%, Pack size 48%, Price 48%	Help consumers navigate through the sea of information having a strong HHH content model, ensuring good quality scores and search ranking on Google	Search, forums, blogs, social	H	M
5	20% speak with friends and family	Target Family/Friends of Novice Mums to become the NR brand of choice	Online testimonials in forums. Friend get friend initiatives	H	L
3	Most shoppers are buying instore 97%. 84% buy in pharmacy, 24% in drugstore, 3% in supermarket. Poor visibility on shelf 13%	Ensure visibility is optimized through pack redesign and explore special displays as a way to demonstrate category leadership	In-store	M	H
1	Purchase Decision Hierarchy: Benefit 35%, Product Ingredients 30%, Brand 15%, Pack Size 10%, Price 8%	Further reinforce product superiority, emphasizing on fast acting and long lasting benefits, to improve value equation	360 approach – Online, on pack, in-store	H	M



Profile of consumer who take this journey:

Marie, 33 years old
Pro Mum



WHO WE ARE

- 6% 18 – 25 y.o.
- 56% 26 – 34 y.o.
- 38% 35 - 50 y.o.



WHAT DOES SHE FEEL

- She feels uncomfortable about the condition, but knows it is common (58%)
- Rashes create a feeling of guilt because their appearance is strongly related to the insufficient care in changing diapers
- When diaper rash appears, she feels a bit distressed, but she is prepared (27%)



WHAT DOES SHE THINK

- She thinks that it's easy to solve and not be embarrassed about it (73%)
- She feels pretty knowledgeable about baby care and products



WHAT DOES SHE SAY

- She is a source of reference for those who don't know much about diaper rash creams and other maternity issues. She likes to share what she has learned and products she considers good for babies



WHAT DOES SHE DO

- Buying repeatedly NR products (92%)
- She buys NR products frequently (9% every 2-3 weeks, 21% once a month, 28% every 2-3 months, 20% every 4-6 months, 13% every 7-12 months)
- Diaper rash cream usage is very often (22% several times a day but not in every diaper change)



WHAT ARE HER CONCERNS

- More concerned about staying close and being involved in her children's growth
- Believes it is important to balance her different roles, mother, wife and professional, but it is difficult (60%)



WHAT ARE HER NEEDS

- She needs more time for little pleasures and selfcare
- Getting the exact product she had planned/wanted/ always buy (25%)
- Making informed decision by having sufficient information on the category (10%)
- Finding the best product for her needs from a variety of options available (14%)
- Finding the best priced product (7%), with the best deal/promotion (4%)



WHO INFLUENCES HER

- Family and friends (70%)
- HCPs: Ped/Pharmacist (67%)
- Online (42%)



WHERE DOES SHE SHOP

- 85% Pharmacy
- 25% Parapharmacy
- 15% Online
- 4% Supermarket



WHAT BRANDS DOES SHE USE

- Bepanthen Pommade 41%
- Mitosyl 25%
- Mustela 15%
- Avène Cicalfate 13%
- Weleda Calendula 11%

Profile of consumer who take this journey:

Marie, 33 years old
Pro Mum



SMARTPHONE IS HER ALLY

- Uses Facebook, YouTube and Instagram at least several times a week (78%, 53% and 46% respectively). Contrarily, 62% never uses Twitter
- Regularly spends time reading news, checking weather (65%) and playing games (40%)
- Occasionally uses Health & Wellness (45%), Travel (43%) and Fitness apps (42%)

BUSY LIFESTYLE!

MULTITASKING

- Finds it difficult to balance work, children and social life (60%)
- 88% claim that family is more important than career
- At the same time 63% say getting promoted at work is important to them
- Buying as much as possible online saves her time from going to the stores (45%)



PRECIOUS MOMENTS

- Goes to the cinema (39%), 1-2 times in 3 months (69%)
- Gardening (34%), 2-4 times a month (43%)
- Doing outdoor sports (30%), 2-4 times a month (46%)
- Goes to concerts (15%), 1-2 times in 3 months (58%)
- She cooks at home (81%)
- Likes watching TV (74%)



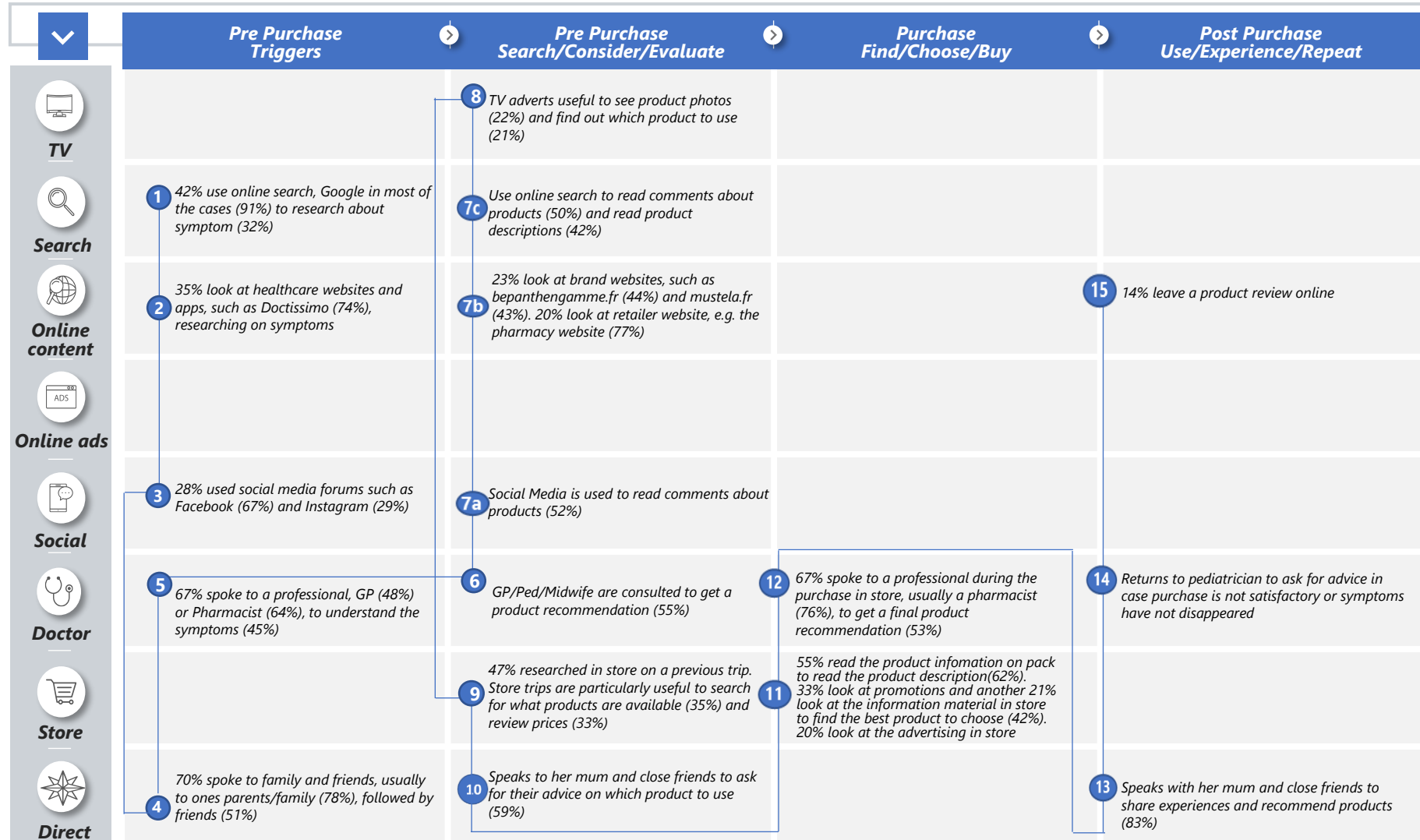
NAPPY RASH FRANCE

THE CONSUMER SHOPPER JOURNEY PRO MUM

	Pre Purchase Triggers	Pre-Purchase Search / Consider / Evaluate	Purchase Find / Choose / Buy	Post Purchase Use / Experience / Repeat
Doing	<p>Triggers: in contact with a full diaper for too long, not using NR cream in all diaper changes, using poor quality NR cream and diaper</p> <p>Main symptoms: skin becomes red, sometimes has blisters, baby crying and having a hard time to sleep</p> <p>Becomes alerted when she diagnoses NR, but feels in control (27%). Discusses with Ped (41%), speaks with the pharmacist (32%), starts to search on the internet (16%), speaks with friends and family (16%)</p>	<p>67% speak to a professional:</p> <ul style="list-style-type: none"> To know which product to use (57%) To get a product recommendation (55%) To understand the symptoms (34%) <p>42% search online:</p> <ul style="list-style-type: none"> To read comments about products (50%) To read product descriptions (42%) To research symptoms/ issues (32%) 	<ul style="list-style-type: none"> 53% decide to buy in store, 47% plan the purchase 62% have a brand already in mind when they walk into the store and buy the brand because they intended to 16% have another brand in mind when get to the store, but choose something else 16% have multiple brands in mind and make up their mind in the store 6% do not think of any brands and make up their mind when in store 	<ul style="list-style-type: none"> 17% use NR product at every diaper change, 22% several times a day but not in every diaper change, 21% several times a week, 10% once a day 19% search for usage instructions, 13% for dosage and side effects. 58% does not do any further research after purchasing Purchase is done, but sometimes it is not satisfactory, causing frustrations, so she returns to HCPs for more advice 14% of users leave a review after use. Of those, 36% leave the review on a pharmacy website
Touchpoints	<p>HCP (Ped 41%, Pharmacist 32%)</p> <p>Online (consumer reviews, SE) (16%)</p> <p>Friends and family (16%)</p>	<p>Friends (40%)</p> <p>Pharma (47%)</p> <p>Relative (57%)</p> <p>GP (36%)</p> <p>Google (42%)</p> <p>Ped (28%)</p> <p>TV (21%)</p> <p>FB (21%)</p> <p>Midwife (8%)</p> <p>Magazine (8%)</p>	<p>HCPs (67%) (Pharma 76%, GP 47%, Ped 38%, Midwife 14%)</p> <p>Product Info/Pack (55%)</p> <p>In store (Promo 33%, Display 43%)</p>	<p>Online Search (9%)</p> <p>Online Reviews (27%)</p> <p>Relatives (18%)</p> <p>Ped/GP (27%)</p>
Gains	<p>Better care for the baby means more security/peace of mind for the mum</p>	<p>Brand with high consideration levels (66%)</p> <p>BPN Pommade is considered different vs. other brands of the category (65%). Meeting consumer main needs (81%)</p> <p>She becomes even more knowledgeable about nappy rash. Understanding the condition gives her a sense of control</p>	<p>High brand recommendation rate by Peds (74%) and Pharmacists</p> <p>Its effective. Quickly repairs (39%) and provides fast relief (36%)</p> <p>Finding and getting the best product for her beloved child that will keep her baby far from nappy rash</p>	<p>Easy to use (82%)</p> <p>Fully meets her needs (80%)</p> <p>Get rid of symptoms and relief her baby</p>
Pains	<p>Feeling uncomfortable, worried and anxious (18%)</p>	<p>Identifying causes & re-evaluating the whole diaper change routine</p> <p>In social media, Oxyplastine leads SOV with 43% and Eryplast ranks 2nd with 25%</p>	<p>Concerned if product will work and deliver fast acting, long lasting</p> <p>Poor visibility on shelf (13%)</p> <p>In store, can be considered same as other brands but at higher price (7%)</p>	<p>Several creams have a sticky texture, not easily absorbed by the baby's skin</p> <p>It is not considered natural (5%), reducing frequency of usage to treatment only occasions</p>
Insights / Why	<ul style="list-style-type: none"> Aware of nappy rash, based on her previous experience, what she has heard from friends/family & her own search They already know how to take care of a baby. They know what they want: finding the best product that meets their needs Pharmacists are a key touchpoint to influence pro mum. They are more likely to be the first touchpoint to use in the journey and throughout the journey as well 	<ul style="list-style-type: none"> Online search, Retailer websites and Healthcare websites meet her expectations on product search (78%, 73% and 80% respectively) Search Hierarchy: Brand 31%, Benefit 24%, Product ingredients 21%, Pack size 13%, Price 9% 	<ul style="list-style-type: none"> Most shoppers are buying instore 97%. 85% buy in pharmacy, 25% in parapharmacy, 4% in supermarket The main drivers of store choice are trust and professional advice Reasons for purchase: 64% needed product immediately, 18% to stock up, 16% exploring new products Purchase Decision Hierarchy: Benefit 37%, Product Ingredients 28%, Brand 18%, Pack Size 10%, Price 7% 	<ul style="list-style-type: none"> Bepanthen Pommade used mainly for treatment vs. prevention 56% of users say the product is extremely easy to use. 26% claim it is fairly easy and 12% say it is difficult to use 80% say the brand fully met their needs. 19% say the brand partially met their needs She needs advice on the right product usage methods, dosage and routines
Implications for brand	<ul style="list-style-type: none"> Build partnerships with Peds & Pharmacists as they play a key role in product recommendation Target Family/Friends of Pro Mums to become the NR brand of choice 	<ul style="list-style-type: none"> Target healthcare websites with compelling content to drive reco and make finding info easy Generate WOM through friends and family Help consumers navigate through the sea of information having a strong HHH content model, ensuring good quality scores and search ranking on Google 	<ul style="list-style-type: none"> Calling out key benefits at shelf, its suitability to relieve the symptoms of nappy rash in a fast and effective manner is key to convince those who are more open to their brand choice at shelf Provide free samples and educational content in Ped offices and Pharmacies to reinforce medical credibility and drive value equation Ensure visibility is optimized through pack redesign and explore special displays as a way to demonstrate category leadership 	<ul style="list-style-type: none"> Reinforce product goodness (e.g. through breathability and small number of ingredients) to increase usage frequency Ensure pack provides clear and detailed explanation on usage instructions and ingredients Encourage positive product reviews & engage with users online

NAPPY RASH FRANCE

THE CONSUMER SHOPPER JOURNEY PRO MUM



CSJ Key Conclusions & Leverage Points

Overall priority (1-2-3-x)	Key conclusions: opportunities to leverage/ barriers to overcome	Task for the brand	Touchpoint to be leveraged	Impact on Bepanthen (high-med-low)	Ability to implement (high-med-low)
4	Becomes alerted when she diagnoses NR. Discusses with Ped (41%), speaks with the pharmacist (32%)	Build partnerships with Peds & Pharmacists as they play a key role in product recommendation	Pediatrician & Pharmacists	H	M
2	42% search online Search Hierarchy: Brand 31%, Benefit 24%, Product ingredients 21%, Pack size 13%, Price 9%	Help consumers navigate through the sea of information having a strong HHH content model, ensuring good quality scores and search ranking on Google	Search, forums, blogs, social	H	M
5	16% speak with friends and family	Target Family/Friends of Novice Mums to become the NR brand of choice	Online testimonials in forums. Friend get friend initiatives	H	L
3	Most shoppers are buying instore 97%. 85% buy in pharmacy, 25% in drugstore, 4% in supermarket. Poor visibility on shelf 13%	Ensure visibility is optimized through pack redesign and explore special displays as a way to demonstrate category leadership	In-store	M	H
1	Purchase Decision Hierarchy: Benefit 37%, Product Ingredients 28%, Brand 18%, Pack Size 10%, Price 7%	Calling out key benefits at shelf, its suitability to relieve the symptoms of nappy rash in a fast and effective manner is key to convince those who are more open to their brand choice at shelf	360 approach – Online, on pack, in-store	H	M

Bepanthen[®]

**CONSUMER SHOPPER
JOURNEY
NAPPY RASH BRAZIL**



The CSJ is built on the design target

Novice Mum

17% of mums in BR in a given year are Novice Mums

It is the strategic focus for the brand → **objective is to get them to choose Bepanthen from pregnancy stage, even before their first interaction with the category & establish the brand as their first choice**

Pro Mum

83% of mums in BR in a given year are Pro Mums

3 Distinctive Personas

Novice Mum

17
%



Juliana

Woman aged 18+, pregnant with her first child & in the 3rd trimester



Ana

Woman aged 18+, first time mum with a child aged 0-12 months, currently wearing nappies, having purchased and used a nappy rash product P12M

Pro Mum

83
%



Maria

Woman aged 18+, first time mum with a child above 12m, currently wearing nappies, having purchased and used a nappy rash product P12M

OR

pregnant with her second child & in the 3rd trimester

OR

mum with child of any age and a second child aged 0-36 months, wearing nappies, having purchased and used a nappy rash product P12M



Profile of consumers who take this journey:

**Juliana, 26 years old
Pregnant**



WHAT DOES SHE FEEL

- Happy and optimistic, but at the same time, anxious and worried about what is to come.
- Is the time to slow down, work less, plan better and organize what is missing.
- Her body is more tired. Small physical difficulties begin to limit her day-to-day life.



WHAT DOES SHE THINK

- Everything is very new. Fear of the unknown. The future "got out of control".
- From here on out, everything is going to be different.
- About baby care, she is greatly influenced by friends and tips given in courses. Even so, the idea is still using different brands to discover the preference (baby's acceptance and effectiveness).



WHAT DOES SHE SAY

- Pregnancy promotes a moment of insight and self-criticism; it makes her rethink the model and lifestyle she has – habits, career, family, home.



WHAT DOES SHE DO

- There is currently more concern and attention to her health and quality of life.
- Physical activities within the limits of what is possible for pregnant women.
- Avoids stressful situations.
- Going to meetings, pregnancy courses, mother groups.



WHAT ARE HER CONCERS

- She really doesn't want to lose her identity and believes she needs to preserve her achievements (work, hobbies and free time).
- Believes it is important to balance her different roles: mother, wife and professional.



WHAT ARE HER NEEDS

- To have good health, physical condition, energy to face childbirth and the few hours of sleep.
- Safety: to feel safe, supported, not to be alone.
- To know how to take good care of her baby.



WHO INFLUENCES HER

- Friends with children, mother, mother-in-law
- Groups and social networks for pregnant women, mothers
- Blogs/ Pages on internet



WHERE DOES SHE SHOP

- 77% Drugstore
- 13% Supermarket
- 5% Online



Profile of consumers who take this journey:

Juliana, 26 years old
Pregnant



EDUCATION IS IMPORTANT

She tries to learn about motherhood through internet pages/blogs, reading books, talking to friends with children

PREPARING HERSELF FOR A NEW LIFE WITH A LESS INTENSE ROUTINE

“MAYBE THE LAST TRIP FOR A WHILE”

Travelling is something she loves. she believes after the childbirth travelling will be harder



WITH SOME RESTRICTIONS, BUT STILL THERE

- Having massages
- Getting her hair and nails done
- Physical activities like gym, walking, biking



FREE TIME & SOCIAL LIFE

- Visiting friends and family
- Going out for dinner
- Watching Netflix / TV



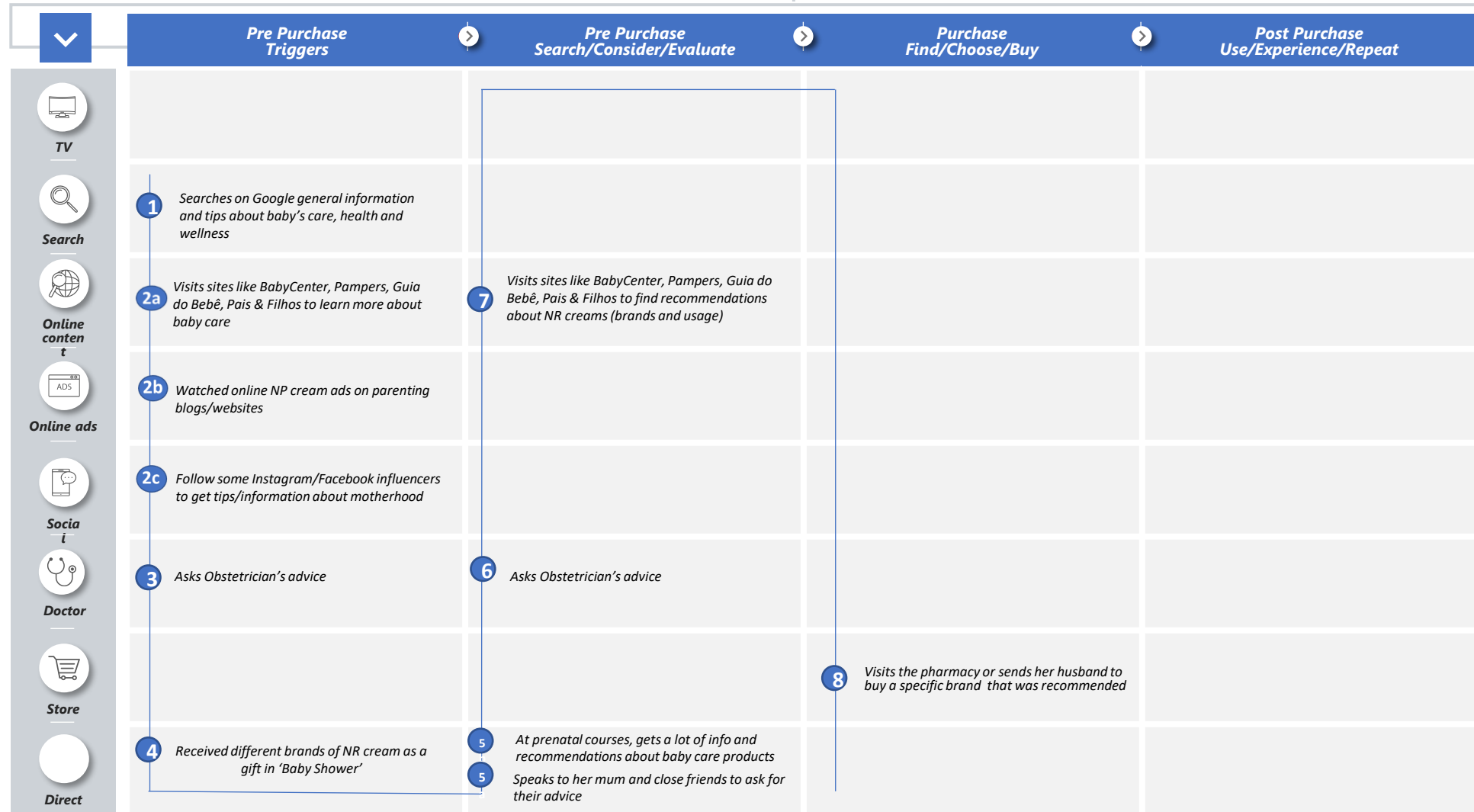
NAPPY RASH BRAZIL

THE CONSUMER SHOPPER JOURNEY NOVICE MUM PREGNANT

	Pre Purchase Triggers			Pre-Purchase Search / Consider / Evaluate	Purchase Find / Choose / Buy	Post Purchase Use / Experience / Repeat
Doing	<p>Trigger: Discovery of pregnancy. Begins the search for general information on pregnancy, childbirth and baby needs</p>	Baby shower	More than 1/3 attends a prenatal course	<p>At 5.5 months pregnant, looks online for information:</p> <ul style="list-style-type: none"> 83% about product use, 79% about product effects, 57% about price, 53% about ingredients 	<p>3 out of 4 go to the pharmacy (or send husband/relative) having specific brand in mind:</p> <ul style="list-style-type: none"> 48% always buying the same brand, 38% considering 2 or 3 brands and deciding which one to buy based on price, 7% buying different brands to try them 	Product has not been used yet (baby has not arrived)
Touchpoints	<p>Baby Showers</p> <p>Friends and family (16%)</p> <p>Gyn (16%)</p> <p>Online (consumer reviews, SE) (26%)</p>	<p>Online (82%) <i>(Online forums 97%, Social Networks 2%, Blogs 1%)</i></p> <p>Gyn (68%)</p> <p>Relatives (52%)</p> <p>Books (31%)</p> <p>Friends (42%)</p> <p>Prenatal Course (28%)</p>	<p>Friends (35%)</p> <p>Pharmacy (27%)</p> <p>Relatives (22%)</p> <p>Doctor (21%)</p> <p>Internet (19%)</p> <p>Baby Shower (16%)</p> <p>TV ad (15%)</p> <p>Internet ad (11%)</p> <p>Free Sample (10%)</p> <p>Maternity ward (6%)</p> <p>Magazine (5%)</p> <p>Prenatal Course (4%)</p>			
Gains	<p>Be prepared for baby's arrival and ensure that the baby is in good health</p>			<p>★ Bepanthen is the most recommended product in the prenatal courses</p> <p>She becomes knowledgeable about nappy rash and how to effectively deal with it/ prevent it. Understanding the condition gives her a sense of control over what's to come</p>	<p>The best product for my beloved child that will keep my baby far from nappy rash</p>	
Pains	<p>Overwhelmed and confused, as all is new to her, feeling anxiety, concern and fear</p>			<p>She is uncertain and has doubts. Worried about product performance and irritation to baby's skin</p> <p>⚠ Much lower SOV (14%) vs. Hipoglos (63%)</p> <p>⚠ Poor website content for FAQs novice mums have</p>	<p>She is price sensitive, even though wants the best for her baby. Sometimes the preferred brand is just too expensive to worth it</p> <p>⚠ Price is the main barrier to purchase for Bepanthen Baby (27%). Other barrier is "Did not see it on the shelf" 9%</p>	
Insights / Why	<ul style="list-style-type: none"> 77% of women have a baby shower. 54% ask for nappy rash cream. 84% do not choose the diaper rash cream brand Use the NR cream received during the first 6 months In the last trimester her frequency of visit to the gyn increases 			<ul style="list-style-type: none"> More in need for advice, explanations about baby issues and advices, recommendations on products She receives nappy rash creams as gifts in the baby shower, so she does not go and buy a product directly Key product features she is looking for: effective to relieve rashes (71%), feel product is working (46%), does not irritate skin (46%). Safe to use (36%) is more expressed by pregnant women. Treatment is a bigger concern than prevention (online) 	<ul style="list-style-type: none"> Key factors influencing buying decision: price 55%, texture (easy to spread) 47%, rapid absorption 39%, doctor reco 38%, formulation 33%, promo 35%, smell/fragrance 32%, known brand 31%, easy to handle packaging 29%, friend reco 29%, practical packaging 16%, pharmacist reco 13%, POS ad 4% Highly planned category with 83% planning to buy pre-store and 60% choose the NR brand before the birth of the child 74% buy in pharmacy/ drugstore, 46% supermarket, 12% baby specialty stores, 6% online pharmacy/drugstore, 4% e-commerce website 	
Implications for brand	<ul style="list-style-type: none"> Target Family/Friends of Novice Mums to become the NR brand of choice for Baby shower gift 			<ul style="list-style-type: none"> Increase brand recommendation from Gyms Reconsider online strategy, so as to ensure optimal budget allocation based on how mums search the brands 	<ul style="list-style-type: none"> Further reinforce product superiority through sensorial claims to improve value equation Leverage other mums through crowdsourcing effect Reconsider media strategy, so as to evaluate the optimal allocation based on how mums find the brands Provide free samples and educational content in maternity wards and Ped offices to reinforce credibility and drive value equation 	

NAPPY RASH BRAZIL

THE CONSUMER SHOPPER JOURNEY NOVICE MUM PREGNANT



CSJ Key Conclusions & Leverage Points

Overall priority (high-med-low or 1-2-3-x)	Key conclusions: opportunities to leverage/ barriers to overcome	Task for the brand	Touchpoint to be leveraged	Impact on Bepanthen (high-med-low)	Ability to implement (high-med-low)
3	77% women have a baby shower. 54% ask for nappy rash cream. 84% do not choose the diaper rash cream brand.	Target Family/Friends of Novice Mums so as to become the NR brand of choice for Baby shower gift	Pharmacy/Drugstore, Baby Stores, Online	H	H
4	In the last trimester her frequency of visit to the gyn increases	Increase brand recommendation from Gyns	Gyn visits	H	M
6	They found the brand by free samples 10% and maternity ward 8%	Provide free samples and educational content	Maternity wards, Ped	M	H
1	Key factors influencing buying decision: price 55%, texture (easy to spread) 47%, rapid absorption 39%, formulation 33%, smell/fragrance 32%,	Further reinforce product superiority through sensorial claims to improve value equation	360 approach (online, in store, on pack)	H	H
2	They found the brand by: friend recommendation 35%, saw it in pharmacy 27%, relatives 22%, doctor's recommendation 21%, internet 19%, baby shower 16%, TV ad 15%, Internet ad 11%, free sample 10%, maternity ward 8%, magazine ad 5%, prenatal course 4%	Leverage other mums through crowdsourcing effect	Online testimonials in forums, friend get friend initiative	H	H
5	Search is 96% in online forums	Reconsider the media strategy, so as to evaluate the optimal allocation based on the learnings	Online, TV	M	H



Ana, 27 years old
Novice Mum



WHO WE ARE:

- 42% 18 – 24 y.o.
- 46% 25 – 34 y.o.
- 12% 35 - 40 y.o.



WHAT DOES SHE FEEL

- Physical discomfort and tiredness prevail. She lives in constant emotional instability. Sometimes she feels complete, happy, fulfilled, and other times she is filled with insecurity, fear and responsibility.
- Rashes create a feeling of guilt because their appearance is strongly related to the insufficient care in changing diapers.



WHAT DOES SHE THINK

- She will no longer have control and 'freedom' in her life. There is a conflict between the need and/or desire to work
- Recommendation is the key! Depends more on doctor and friend's opinion when choosing products
- She believes nappy rash cream is mandatory in baby's daily care routine



WHAT DOES SHE SAY

- Social media is an important source to get information and support



WHAT DOES SHE DO

- Cleaning is done, preferentially, with cotton and water.
- Diaper rash cream usage is more often, almost in all diaper changing.
- Less open to try different solutions for rashes (like Cornstarch and Almond oil, for example)



WHAT ARE HER CONCERNS

- Establish a routine, recover some control of her life.
- Worries a lot about providing a healthy diet for her child and using the right products



WHAT ARE HER NEEDS

- She needs to find a balance between the 'new family member' and her old life.
- She wants to sleep more, eat better, receive support from family and friends and have free time.
- Her baby's well-being is a top priority and preventing diaper rashes is one of the ways to provide it.
- Looks for a 'trustful' nappy rash cream (from a well-known brand), affordable and recommended by doctors / friends / internet



WHO INFLUENCES HER

- 31% Herself
- 16% Pediatrician
- 21% Her parents/parents-in-law
- 15% Friends
- 7% Husband



WHERE DOES SHE SHOP

- 78% Drugstore
- 13% Supermarket
- 5% Online



WHAT BRANDS DOES SHE USE

- 38% Bepantol Baby
- 25% Hipoglós original
- 25% Hipoglós amêndoas
- 23% Huggies
- 22% Genérico Nistatina + Óxido de Zinco



Profile of consumers who take this journey:

Ana, 27 years old
Novice Mum



SHE IS LOST!

- Everything is new and frightening! Most of her time is spent on her baby. No time and energy for hobbies; entertainment is rare. Basic self-care is no longer possible.

SMARTPHONE IS HER ALLY

- Mostly Instagram, Facebook, Whatsapp, food delivery apps

SIMPLE THINGS ARE GOLD!

RECEIVING AFFECTION

- She likes to be 'pampered' by her husband, mother, mother-in-law
- Family moments matter



"ME TIME"

- Taking a long bath
- Watching series/shows/soap operas on TV
- Reading a book



VISITING OUTSIDE WORLD

- Going to visit some friends
- Going out to eat
- Quick outings



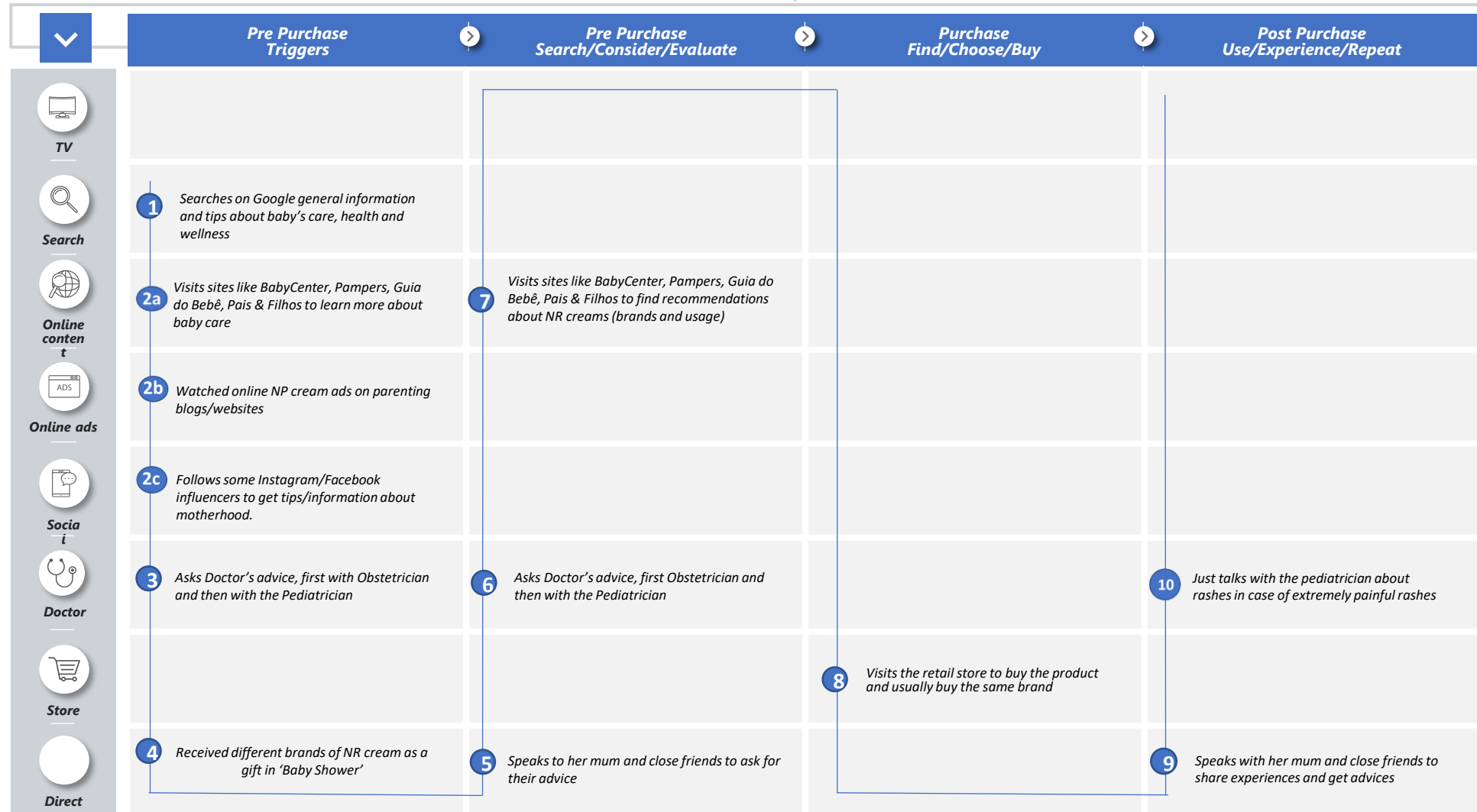
NAPPY RASH BRAZIL

THE CONSUMER SHOPPER JOURNEY NOVICE MUM WITH BABY

	Pre Purchase Triggers	Pre-Purchase Search / Consider / Evaluate	Purchase Find / Choose / Buy	Post Purchase Use / Experience / Repeat
Doing	<ul style="list-style-type: none"> Triggers: wearing soiled diaper for long 84%, not using NR cream in all diaper changes 39%, using poor quality NR cream 33% Main symptoms: skin becomes red (61%), blisters (30%), baby crying and having a hard time to sleep (5%) Becomes alerted when she diagnoses NR. Seeks advice information 	<ul style="list-style-type: none"> 83% search online about product use, 79% about product effects, 57% about price, 53% about ingredients 	<p>3 out of 4 go to the pharmacy (or send husband/relative) having specific brand in mind:</p> <ul style="list-style-type: none"> 48% always buying the same brand, 38% considering 2 or 3 brands and deciding which one to buy based on price, 7% buying different brands to try them 	<ul style="list-style-type: none"> 86% use it mainly for prevention and 14% for treatment 1/3 continues using only the brand chosen during pregnancy, 53% continues using the brand chosen but also uses other brands. 9% started using another brand Purchase was done, but sometimes it was not satisfactory, causing frustrations, so she returns to online forums for more advices 1/4 comes back to online forums to share experiences and advice to less experienced mothers
Touchpoints	<ul style="list-style-type: none"> Friends and family (16%) Ped (16%) Online (consumer reviews, SE) (26%) 	<ul style="list-style-type: none"> Online (search engines, forums, blogs, brand websites) 	<ul style="list-style-type: none"> Friends (35%) Pharmacy (27%) Relatives (22%) Doctor (21%) Internet (19%) Baby Shower (16%) TV ad (15%) Internet ad (11%) Free Sample ad (10%) Maternity ward (6%) Magazine ad (5%) Prenatal Course (4%) 	<ul style="list-style-type: none"> Online (forums, social networks, reviews & blogs)
Gains	<p>Take care of her baby's skin; Reduce any discomfort caused by NR; Stop NR from getting worse; Identify cause & how it can be avoided</p>	<p>Brand with high affinity</p> <p>Bepantol related to effectiveness, light texture, with long lasting relief</p> <p>Understanding the condition, gives her a sense of control</p>	<p>The best product for my beloved child that will keep my baby far from nappy rash</p>	<p>Bepantol achieves high satisfaction level and has some of the most desired characteristics, fast absorption and easy to spread</p> <p>Get rid of symptoms and relief my baby. Prevent reoccurrence</p>
Pains	<p>Overwhelmed and confused, as all is new to her, feeling anxiety, concern and fear</p>	<p>Worried about product performance and irritation to baby's skin</p> <ul style="list-style-type: none"> Much lower SOV (14%) vs. Hipoglos (63%) Bepantol price is considered too high 	<p>She is price sensitive, even though wants the best for her baby. Sometimes the preferred brand is expensive and not worth it</p> <ul style="list-style-type: none"> Price is the main barrier to purchase for Bepantol Baby (27%) Other barrier is "Did not see it on the shelf" 9% 	<p>Product application and usage dissatisfaction is a key pain point. Some creams have a sticky texture, not easily absorbed by the baby's skin</p> <ul style="list-style-type: none"> Price is the most relevant Bepantol barrier (62% of those used Bepantol before but have not bought it in the last 6 months think its very expensive)
Insights / Why	<ul style="list-style-type: none"> Aware of nappy rash, based on what she has heard from friends/family & her own search whilst she was pregnant She needs advice on the right product usage methods, dosage and routines 	<ul style="list-style-type: none"> More in need of guidance, explanations about baby issues, advice and recommendations on products As she has received nappy rash creams as gifts in the baby shower or in maternity ward, she does not go and buy a product directly when baby is born and nappy rash occurs Key product features she is looking for: effective to relieve rashes (71%), feel product is working (46%), does not irritate skin (46%). Treatment is a bigger concern than prevention (online) 	<ul style="list-style-type: none"> Key factors influencing buying decision: price 55%, texture (easy to spread) 47%, rapid absorption 39%, doctor reco 38%, formulation 33%, promo 35%, smell/fragrance 32%, known brand 31%, easy to handle packaging 29%, friend reco 29%, practical packaging 16%, pharmacist reco 13%, POS ad 4% Highly planned category with 83% planning to buy pre-store and 60% choose the NR brand before the birth of the child 74% buy in pharmacy/ drugstore, 46% supermarket, 12% baby specialty stores, 6% online pharmacy/ drugstore, 4% e-commerce website 	<ul style="list-style-type: none"> Those who changed the brand, did it mainly for its price (38%), like trying different brands (22%), received one as a gift (8%), doctor's recommendation (6%), to avoid baby skin getting used to one product (2%) Change her baby's nappies at least 5 times a day, 25% use NR cream in all nappy changes but 45% use only when the diaper is soiled
Implications for brand	<ul style="list-style-type: none"> Target Family/Friends of Novice Mums to become the NR brand of choice 	<ul style="list-style-type: none"> Target online forums and blogs to increase brand recommendation 	<ul style="list-style-type: none"> Further reinforce product superiority through sensorial claims to improve value equation Leverage other mums through crowdsourcing effect Reconsider media strategy, so as to evaluate the optimal allocation based on how mums find the brands Provide free samples and educational content in maternity wards and Ped offices to reinforce medical credibility and drive value equation 	<ul style="list-style-type: none"> Focus on prevention but normalize treatment, reassuring and educating Mums that NR is normal and there is no need to change brand when NR occurs Price value equation has been addressed across range as recommended by NRM. Track consumer sentiment and look at how impacts verbatim on the brand

NAPPY RASH BRAZIL

THE CONSUMER SHOPPER JOURNEY NOVICE MUM WITH BABY



CSJ Key Conclusions & Leverage Points

Overall priority (high-med-low or 1-2-3-x)	Key conclusions: opportunities to leverage/ barriers to overcome	Task for the brand	Touchpoint to be leveraged	Impact on Bepanthen (high-med-low)	Ability to implement (high-med-low)
3	77% women have a baby shower. 54% ask for nappy rash cream. 84% do not choose the diaper rash cream brand.	Target Family/Friends of Novice Mums so as to become the NR brand of choice for Baby shower gift	Pharmacy/Drugstore, Baby Stores, Online	H	H
4	In the last trimester her frequency of visit to the gyn increases	Increase brand recommendation from Gyns	Gyn visits	H	M
6	They found the brand by free samples 10% and maternity ward 8% 72% ask for doctor's help in case of rash	Provide free samples and educational content	Maternity wards, Ped	M	H
2	They found the brand by friend recommendation 35%. 1/4 comes back to social to share their experiences and advices to less experienced mothers, discussing treatments and solutions on online forums.	Leverage other mums through crowdsourcing effect	Online testimonials in forums, friend get friend initiative	H	H

CSJ Key Conclusions & Leverage Points

Overall priority (high-med-low or 1-2-3-x)	Key conclusions: opportunities to leverage/ barriers to overcome	Task for the brand	Touchpoint to be leveraged	Impact on Bepanthen (high-med-low)	Ability to implement (high-med-low)
7 (n/a for novice mum pregnant)	Treatment is a bigger concern than prevention	Focus on prevention but normalize treatment, reassuring and educating Mums that NR is normal and there is no need to change brand when NR occurs	Online content in forums Educational material provided with samples	M	H
1	Key factors influencing buying decision: price 55%, texture (easy to spread) 47%, rapid absorption 39%, formulation 33%, smell/fragrance 32%,	Further reinforce product superiority through sensorial claims to improve value equation	360 approach (online, in store, on pack)	H	H
5	They found the brand by: friend recommendation 35%, saw it in pharmacy 27%, relatives 22%, doctor's recommendation 21%, internet 19%, baby shower 16%, TV ad 15%, Internet ad 11%, free sample 10%, maternity ward 8%, magazine ad 5%, prenatal course 4% Search is 96% in online forums	Reconsider the media strategy, so as to evaluate the optimal allocation based on the learnings	Online, TV	M	H
8 (n/a for novice mum pregnant)	Price is the biggest BPL barrier, especially for repurchase	Price value equation has been addressed across range as recommended by NRM Track consumer sentiment and look at how impacts verbatim on the brand	On shelf	H	H



**Maria, 30 years old
Pro Mum**



WHO WE ARE:

- 26% 18 – 24 y.o.
- 44% 25 – 34 y.o.
- 30% 35 - 40 y.o.



WHAT DOES SHE FEEL

- Tired, struggling with emotional stress
- At the same time, there is a sense of achievement: she already went through the 'dangers of the first year of life'!
- When diaper rashes appears, she feels a bit distressed, even though it is 'expected'



WHAT DOES SHE THINK

- She thinks herself pretty knowledgeable about baby care and products.
- She believes diaper rash cream is a product more important for smaller babies, with more sensitive skin



WHAT DOES SHE SAY

- She is a source of reference for those who don't know much about diaper rash creams and other maternity issues. She likes to share what she had learned and products she considers good for the babies



WHAT DOES SHE DO

- Try changing soiled diapers immediately in order to prevent rashes
- Cleaning is done with baby wipes and diaper rash cream usage is less often (she doesn't use it on every single diaper change)



WHAT ARE HER CONCERNS

- More concerned about staying close and being involved in her children's growth



WHAT ARE HER NEEDS

- She needs more time for little pleasures and selfcare. Receiving the support from nanny/maid is desired
- Her children well-being is a priority and preventing diaper rashes is one of the ways of provide it
- Chooses the best cost-benefit product – a high quality cream with the less cost possible, a cost that she can afford.
- Looks for a nappy rash cream with good texture (easy to spread) and an easy-to-handle packaging.



WHO INFLUENCES HER

- 44% Herself
- 22% Pediatrician
- 15% Her parents /
- Parents-in-law
- 8% Friends
- 5% Husband



WHERE DOES SHE SHOP

- 77% Drugstore
- 13% Supermarket
- 5% Online



WHAT BRANDS DOES SHE USE

- 36% Genérico Nistatina + Óxido de Zinco
- 33% Bepantol Baby
- 31% Hipoglós original
- 28% Hipoglós amêndoas
- 15% Huggies



Profile of consumers who take this journey:

Maria, 30 years old
Pro Mum



HOMELY PERSON

Most part of her time is dedicated on her children, there is no time left for hobbies; entertainment is rare

SMARTPHONE HEAVY USER

Mostly Instagram, Facebook, Whatsapp, food delivery apps

APPRECIATES HAVING QUALITY TIME OUT OF HER DAILY ROUTINE!

WITH HER CHILDREN

Prefers clubs and parks (and similar 'open spaces') where children can run and 'waste energy'



ALONE

- Reading a book
- Surfing on Netflix and social media
- Preparing tasty food
- Watching series/shows/soap operas on TV



WITH HER PARTNER

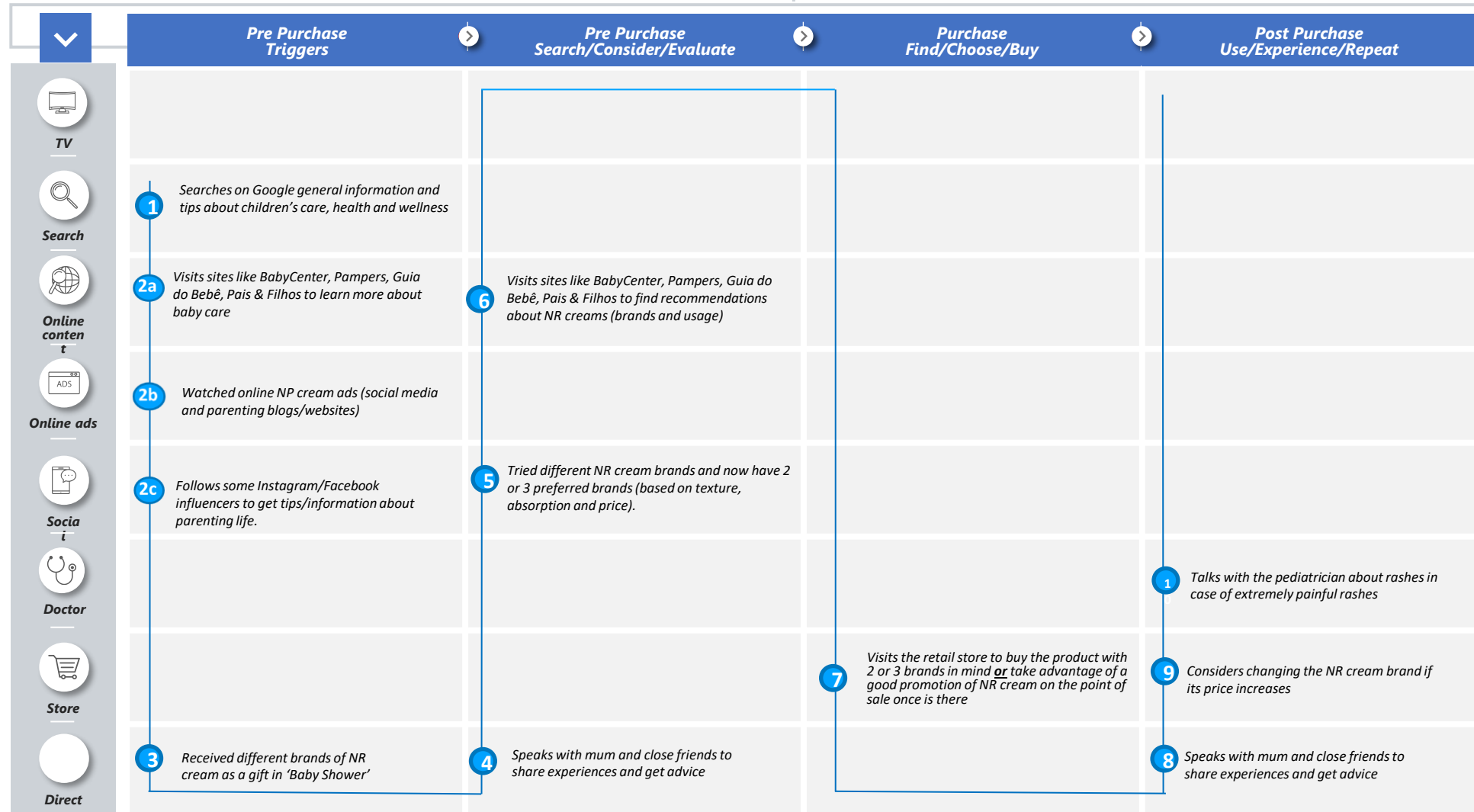
- Having a 'quiet and calm' meal together
- Watching series and movies together



	Pre Purchase Triggers	Pre-Purchase Search / Consider / Evaluate	Purchase Find / Choose / Buy	Post Purchase Use / Experience / Repeat
Doing	<ul style="list-style-type: none"> Triggers: wearing soiled diaper for long 84%, not using NR cream in all diaper changes 39%, using poor quality NR cream 33% Main symptoms: skin becomes red (61%), blisters (30%), baby crying and having a hard time to sleep (5%) Becomes alerted when she diagnoses NR, but she knows what to do 	<ul style="list-style-type: none"> Knows what she wants and how to treat NR. Look mainly for sales on retailers websites 83% search about product use, 79% about product effects, 62% about ingredients, 57% about price 	<p>3 out of 4 go to the pharmacy having specific brand in mind but they are less loyal:</p> <ul style="list-style-type: none"> 41% always buying the same brand, 39% considering 2 or 3 brands and deciding which one to buy based on price, 11% buying different brands to try them 	<ul style="list-style-type: none"> 86% use it mainly for prevention and 14% for treatment 1/3 continue using only the brand chosen during pregnancy. 53% continue using the brand chosen but also uses other brands. 9% started using another brand Purchase was done, but sometimes it was not satisfactory, causing frustrations, so she returns to online forums for more advices 1/4 comes back to social to share their experiences and advice to less experienced mothers, discussing treatments and solutions on online forums
Touchpoints	<ul style="list-style-type: none"> Ped (16%) Rest HCPs (16%) Relatives (4%) 	<ul style="list-style-type: none"> Retailers websites Online (baby forums, search engines/Google, brand websites) 	<ul style="list-style-type: none"> Friends (19%) Pharmacy (19%) Relatives (22%) Doctor (21%) Internet (19%) Baby Shower (16%) TV ad (15%) Internet ad (11%) Free Sample (10%) Maternity ward (8%) Magazine ad (5%) Prenatal Course (4%) 	<ul style="list-style-type: none"> Online (forums, social networks, reviews & blogs)
Gains	<p>A better care for the baby means more security/ 'peace of mind' for the mom</p>	<p>She becomes even more knowledgeable about nappy rash. Understanding the condition gives her a sense of control</p>	<p>The best product for my beloved child that will keep my baby far from nappy rash and has good value for money</p>	<p>Get rid of symptoms and relief my baby. Prevent recurrence</p>
Pains	<p>Concerned mostly about allergies or skin redness caused by the application of nappy rash creams, since they have more experience in detecting sudden changes in the baby's skin</p>	<p>Much lower SOV (14%) vs. Hipoglos (63%)</p> <p>Bepantol price is considered too high</p> <p>Worried about product performance and irritation to baby's skin</p>	<p>She is price sensitive, even though wants the best for her baby. Sometimes the preferred brand is just too expensive and not worth it</p> <p>Price is the main barrier to purchase for Bepantol Baby (27%).</p>	<p>Allergies or skin redness caused by application of nappy rash creams is the main pain point (21%), followed by texture (16%) and hygiene (9%)</p> <p>Price is the most relevant Bepantol barrier (62% of those used Bepantol before but have not bought it in the last 6 months think its very expensive)</p>
Insights / Why	<ul style="list-style-type: none"> Aware of nappy rash based on her own experience, what she has heard from friends /family & search for information online They already know how to take care of a baby. They know what they want: good brands but only at a fair price 65% women have a baby shower. 74% let the guests choose the diaper rash cream brand 	<p>Key product features they are looking overall online:</p> <ul style="list-style-type: none"> effective to relieve rashes (54%), feel product is working (49%), does not irritate skin (25%). Treatment is a bigger concern than prevention. 	<p>Key factors influencing buying decision: price 55%, texture (easy to spread) 47%, rapid absorption 46%, doctor reco 38%, formulation 40%, promo 35%, smell/fragrance 32%, known brand 31%, easy to handle packaging 29%, friend reco 29%, practical packaging 24%, pharmacist reco 13%, POS ad 8%</p> <ul style="list-style-type: none"> Highly planned category with 83% planning to buy pre-store and 77% choose the diaper rash brand before the birth of the child 74% buy in pharmacy/ drugstore, 46% supermarket, 12% baby specialty stores, 6% online pharmacy/drugstore, 4% e-commerce website 	<ul style="list-style-type: none"> They've tried different brands and have 2-3 brands under consideration They change their baby's nappies at least 5 times a day and 18% of them uses NR cream in all nappy changes but 45% uses only when the diaper is soiled Those who changed the brand, did it mainly for its price (38%), like trying different brands (22%), received one as a gift (8%), doctor's recommendation (6%), to avoid baby skin getting used to one product (2%)
Implications for brand	<ul style="list-style-type: none"> Increase brand recommendation from Peds Target Family/Friends of Pro Mums so as to become the NR brand of choice for Baby shower gift 	<ul style="list-style-type: none"> Strengthen brand presence in retailers websites 	<ul style="list-style-type: none"> Further reinforce product superiority through sensorial claims to improve value equation Provide free samples and educational content in maternity wards and Ped offices 	<ul style="list-style-type: none"> Focus on prevention but normalize treatment, reassuring and educating Mums that NR is normal and there is no need to change brand when NR occurs Price value equation has been addressed across range as recommended by NRM. Track consumer sentiment and look at how impacts verbatim on the brand

NAPPY RASH BRAZIL

THE CONSUMER SHOPPER JOURNEY PRO MUM



CSJ Key Conclusions & Leverage Points

Overall priority (high-med-low or 1-2-3-x)	Key conclusions: opportunities to leverage/ barriers to overcome	Task for the brand	Touchpoint to be leveraged	Impact on Bepanthen (high-med-low)	Ability to implement (high-med-low)
4	65% women have a baby shower. 74% do not choose the diaper rash cream brand.	Target Family/Friends of Novice Mums to become the NR brand of choice for Baby shower gift	Pharmacy/Drugstore, Baby Stores, Online	M	H
1	Pro mums need expert advice (influenced by: 67% pediatrician, 16% rest HCPs, 4% relatives, 14% Others) When pregnant, 68% search info through the gynecologist 72% ask doctor's help in case of rash	Increase brand recommendation from Gyns, Peds, HCPs overall	HCP visits	H	H
6	They found the brand by free samples 10% and maternity ward 8% 72% ask for doctor's help in case of rash	Provide free samples and educational content	Maternity wards, Ped	M	H

CSJ Key Conclusions & Leverage Points

Overall priority (high-med-low or 1-2-3-x)	Key conclusions: opportunities to leverage/ barriers to overcome	Task for the brand	Touchpoint to be leveraged	Impact on Bepanthen (high-med-low)	Ability to implement (high-med-low)
5	Treatment is a bigger concern than prevention	Focus on prevention but normalize treatment, reassuring and educating Mums that NR is normal and there is no need to change brand when NR occurs	Online content in forums Educational material provided with samples	M	H
3	Key factors influencing buying decision: price 55%, texture (easy to spread) 47%, rapid absorption 46%, formulation 40%, smell/fragrance 32%,	Further reinforce product superiority through sensorial claims to improve value equation	360 approach (online, in store, on pack)	H	H
2	They found the brand by: have already used it in another child 46% Pro mums are less loyal They mainly look for product sales on retailers websites	Focus on Novice Mums and prioritize this target group	360 approach	H	H
7	Price is the biggest BPL barrier	Price value equation has been addressed across range as recommended by NRM Track consumer sentiment and look at how impacts verbatim on the brand	On shelf	H	H