Scintilla Case Study

Bayer Digestive Health:
Shaping new product launches with Scintilla Customer Feedback

Inspire 2024

This case study was shared live at **Walmart Data Ventures Inspire Event**, October 1, 2024.

The information is great, but the why behind it is even better.

- Melissa Fandrich, Manager, Insights & Strategy | Bayer Consumer Health

Melissa Fandrich
Manager, Insights & Strategy
Bayer Consumer Health

Scintilla Case Study: Bayer

The opportunity: Optimize a launch at Walmart

Ahead of launching four new digestive health products, Bayer wanted to better understand purchase interest and determine any drivers or barriers to optimize the launch at Walmart.

Scintilla Case Study: Bayer

The approach: Ask verified customers directly using Customer Perception

Bayer ran three surveys in Scintilla Customer Perception to gain insights from verified shoppers in the Walmart Spark Customer Community.

The groups surveyed included:

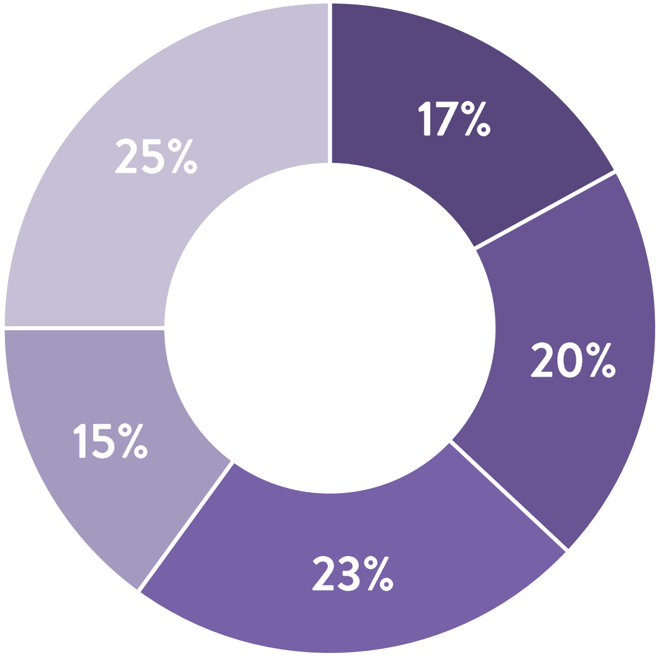
- Customers who suffer from occasional heartburn and purchased any antacid product for themselves in the past six months
- Customers who suffer from occasional constipation or irregularity and purchased any laxative product for themselves in the past six months
- Customers who suffer from multiple symptoms who purchased any digestive health product for themselves in the past six months

 | *Proprietary First-Party Data, Scintilla 2024.

Scintilla Case Study: Bayer
The approach: Alka-Seltzer

First up is Alka-Seltzer Fizzy Melts. 60% of shoppers would potentially buy it driven by brand trust, the convenience of no water needed, and its unique form.

Purchase interest: Alka-Seltzer Fizzy Melts



Likely to buy:

"They're convenient **and I like how you don't need water.**"

"**I like that it melts.** Sometimes indigestion makes it hard to swallow pills."

"The fact **no water is required.** I always associate this brand with needing water."

"Says **fast acting and no water needed.** I frequently wake up in the middle of the night with heartburn and this product looks like it would be perfect to use then."

"I like that it's more convenient with no water needed. The **flavor is good for nausea.**"

"Because **I trust that brand** and want quick relief."

Unlikely to buy:

"I **don't like the concept of a fizzy drop** fizzing in my mouth till it dissolves."

"**Price per dosing is high** compared to other antacids."

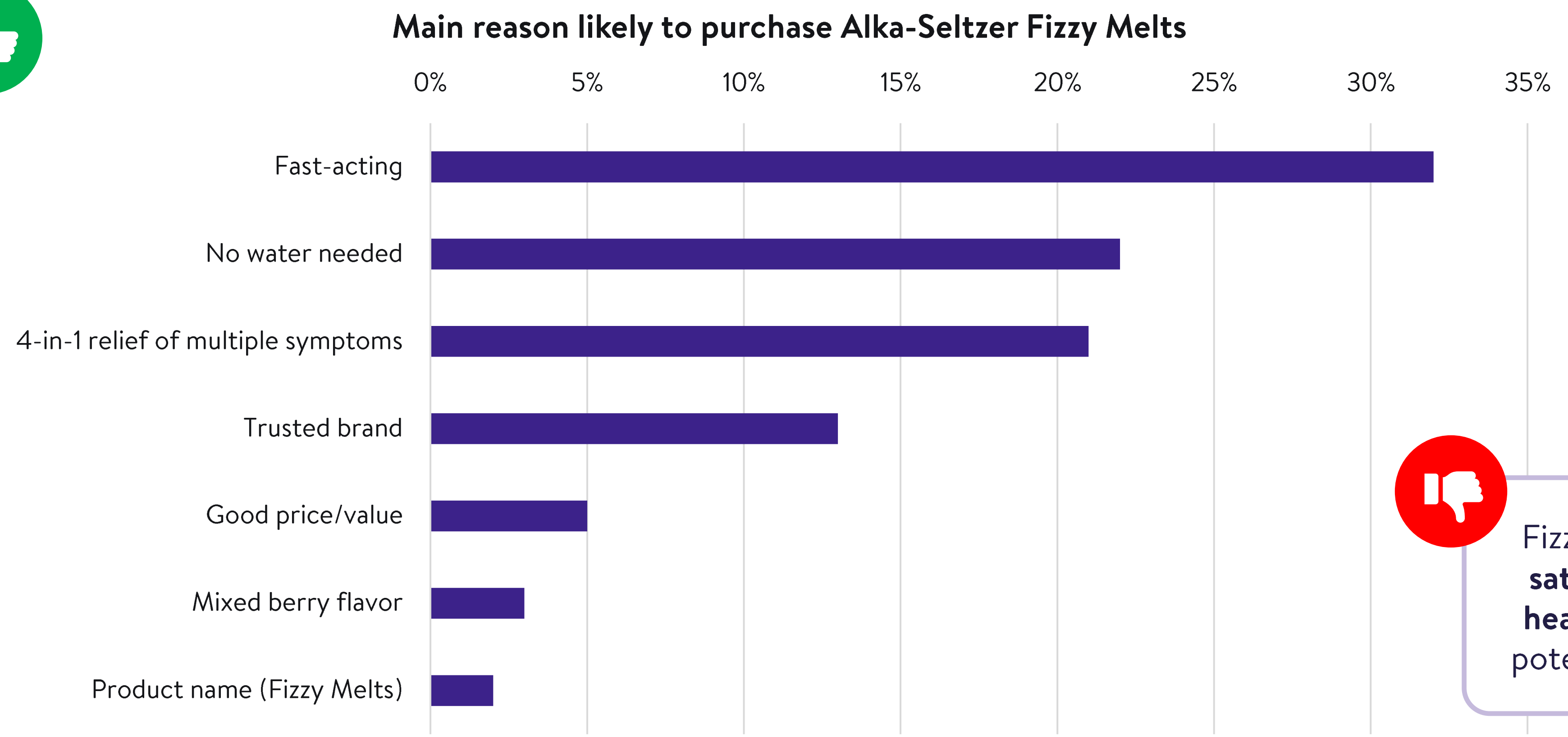
"I **don't want to waste money on something I'm unsure of.** I doubt I would buy it unless I were able to sample it first."

"I **already have products that I normally use** to treat all of the symptoms that these are meant to treat. I also don't like the fizzy idea."

 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer
The approach: Alka-Seltzer

Topping the list of reasons to purchase the product is that it is fast-acting.

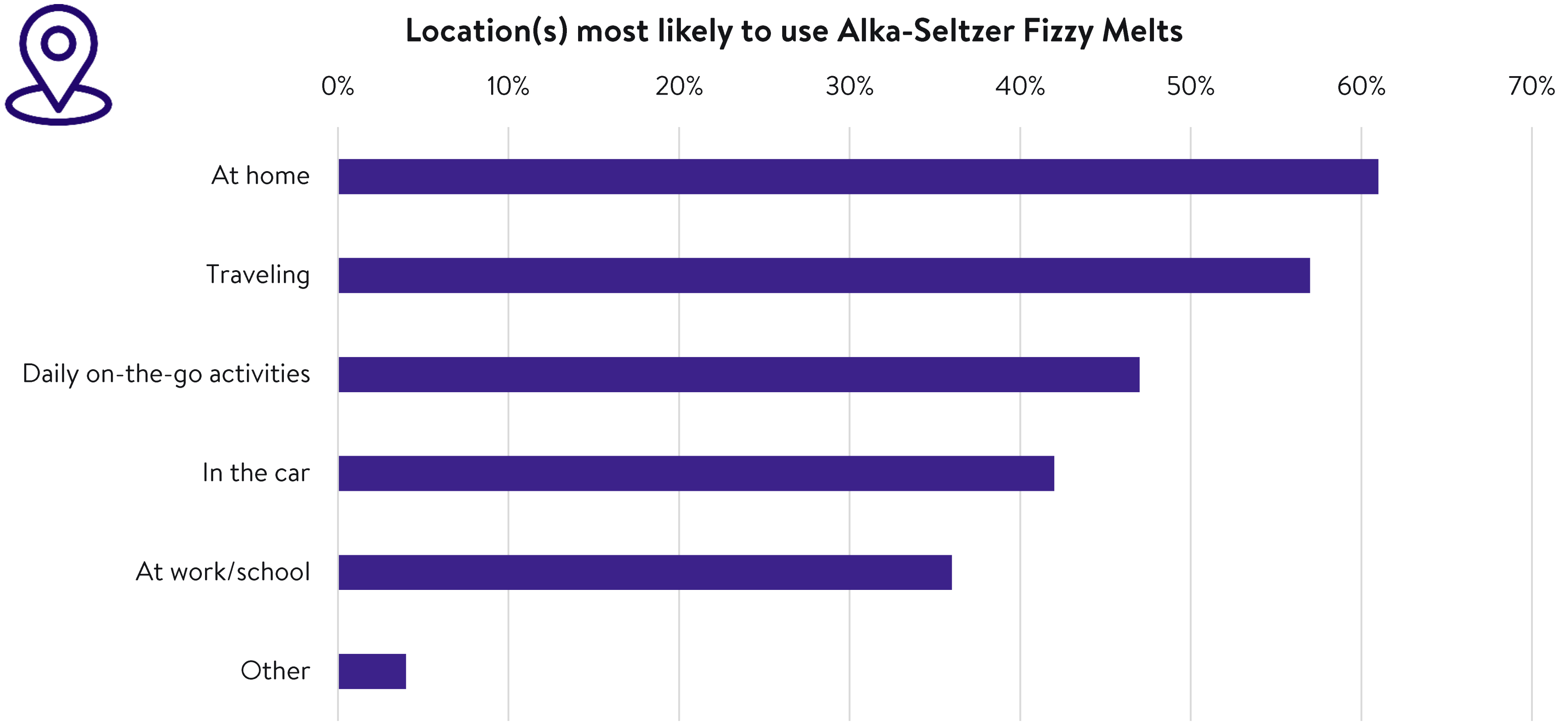


Fizzy **sensation**, **form**, and **satisfaction with current heartburn treatments** are potential purchase barriers.

 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer
The approach: Alka-Seltzer

Although Fizzy Melts are positioned as a convenient, on-the-go product, customers said they are equally likely to use at home.



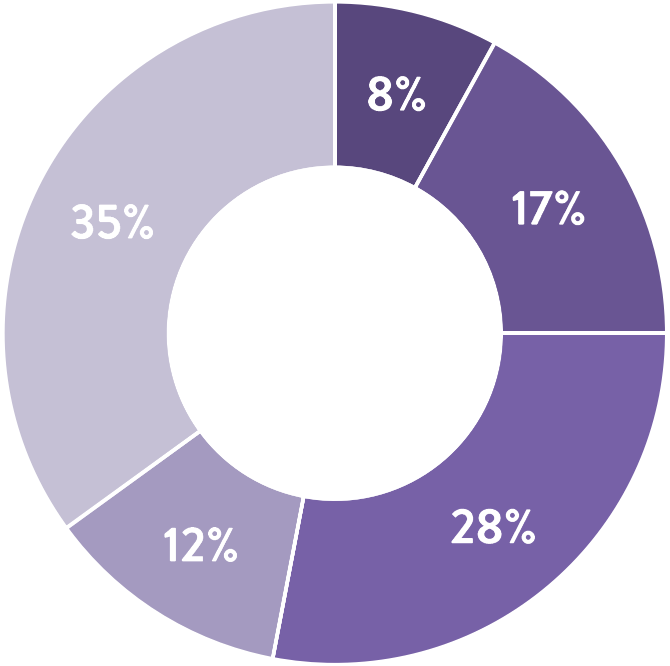
 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer

The approach: MiraLAX Orange

Next is MiraLAX. Over 50% of customers say they would potentially purchase it—and though orange flavor can be polarizing, this offers an option for those interested in variety.

Purchase interest: MiraLAX Orange



Likely to buy:

- "Just a fan of the brand & **something flavored would be nice.**"
- "**Miralax is a great product** and works well."
- I prefer the Miralax brand, and I use it in plain water, so **orange flavored may be nice.**
- "It sounds really good, and **I believe it would work.**"
- "It sounds interesting and **has a different flavor.**"
- "I'm likely because I saw it has **no harsh side effects.**"
- "**Usually add it to a flavored beverage** with this one I could just use water."

Unlikely to buy:

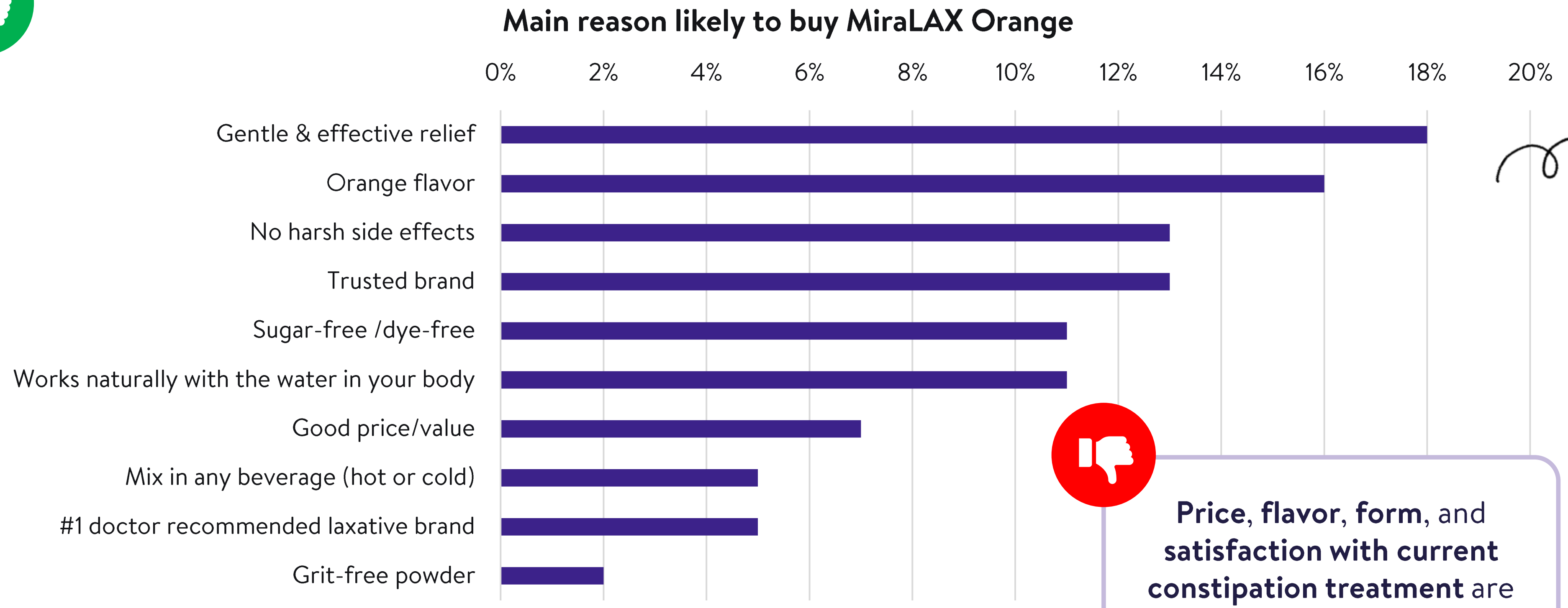
- "I would not buy this because **orange flavored things make me nauseous.**"
- "When I am feeling constipated, **I tend to be a bit nauseous and want the flavor to be something mild**, where citrus can sometimes be a powerful flavor."
- "**Too expensive** for quantity."
- "I **do not like powders that have to be mixed in a liquid.** It is more expensive than what I currently use."
- "A dollar a dose **seems pretty high.**"
- "Because **the regular kind is fine**, and it mixes with anything."

 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer

The results: MiraLAX Orange

Its messaging of gentle and effective relief, orange flavor, lack of harsh side effects, and trusted brand recognition are the key drivers of customer's interest.



Price, **flavor**, **form**, and **satisfaction with current constipation treatment** are potential purchase barriers.

54 out of top 100

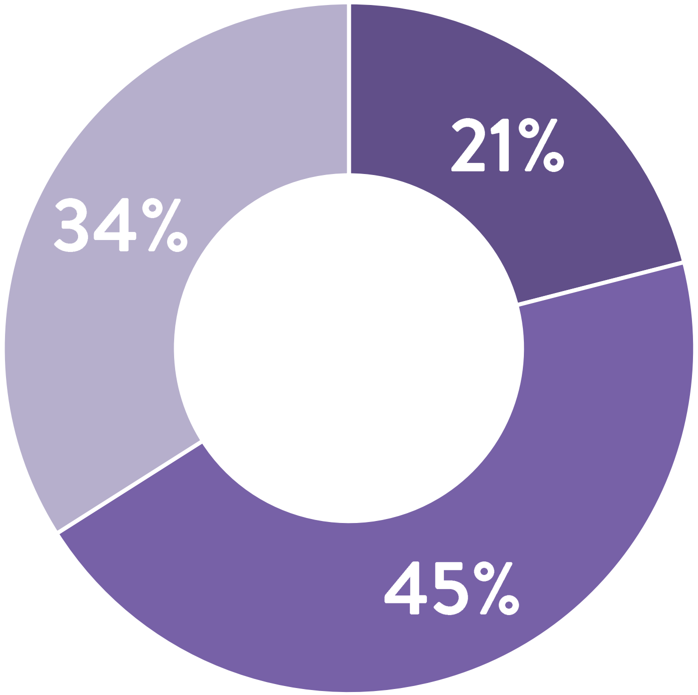
Top products in the MiraLAX Orange basket are **flavored**, indicating this customer is **flavor-oriented** *(post-launch)*

 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer
The approach: MiraLAX Orange

With a third of customers interested in buying MiraLAX Orange in addition to other products, it is likely to be incremental to the laxatives category.

MiraLAX Orange: Impact on current behavior



- Replace all current laxative products with MiraLAX Orange
- Replace some current laxative products with MiraLAX Orange
- Buy MiraLAX Orange in addition to current laxative products

Since launch, over
50%
of MiraLAX Orange sales are incremental to the category.

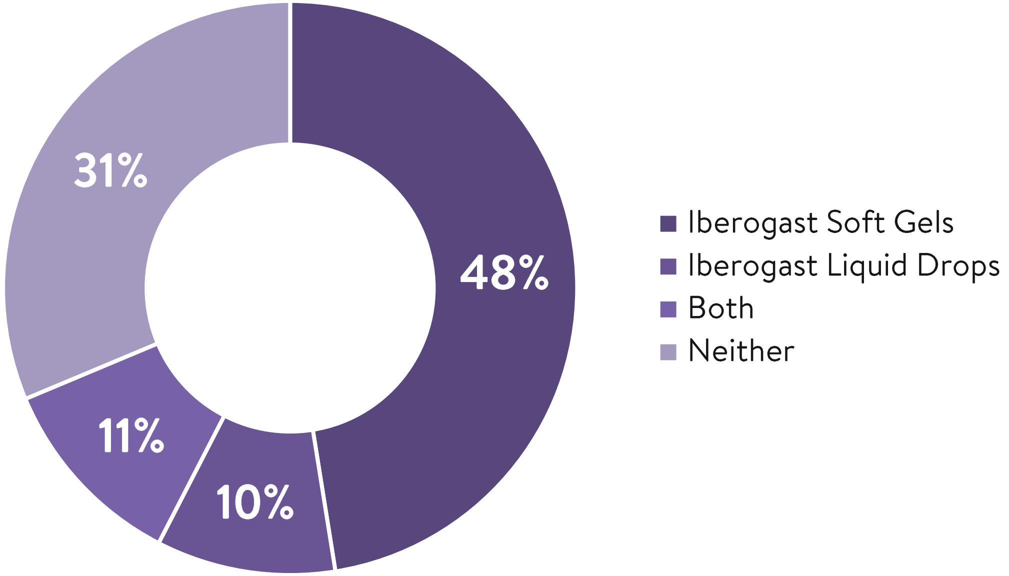
 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer

The approach: Iberogast Soft Gels vs Liquid Drops

Iberogast is new to the U.S. market and it comes in two forms. While there is a large preference towards soft gels, some customers prefer drops because they feel they work faster, may be better tolerated, and offer a better value, indicating a demand for both products.

Iberogast Soft Gels vs. Liquid Drops preference



Likely to buy:

Soft gels:

- "Probably **easier to take**, less possibility to make a mess."
- "I don't like the idea of liquid drops; with soft gels you **don't usually have to worry about an aftertaste.**"
- "I don't like licorice, so if this has any flavor, **I'd rather take a pill, so I don't taste it.**"
- "It's **more convenient** and there's no risk of it having a bad taste like many liquid medications."
- "**Easy to take and store.** No measure of dosage, just take the required pill amount."
- "I **prefer taking a gel** with my daily vitamins."

Liquid drops:

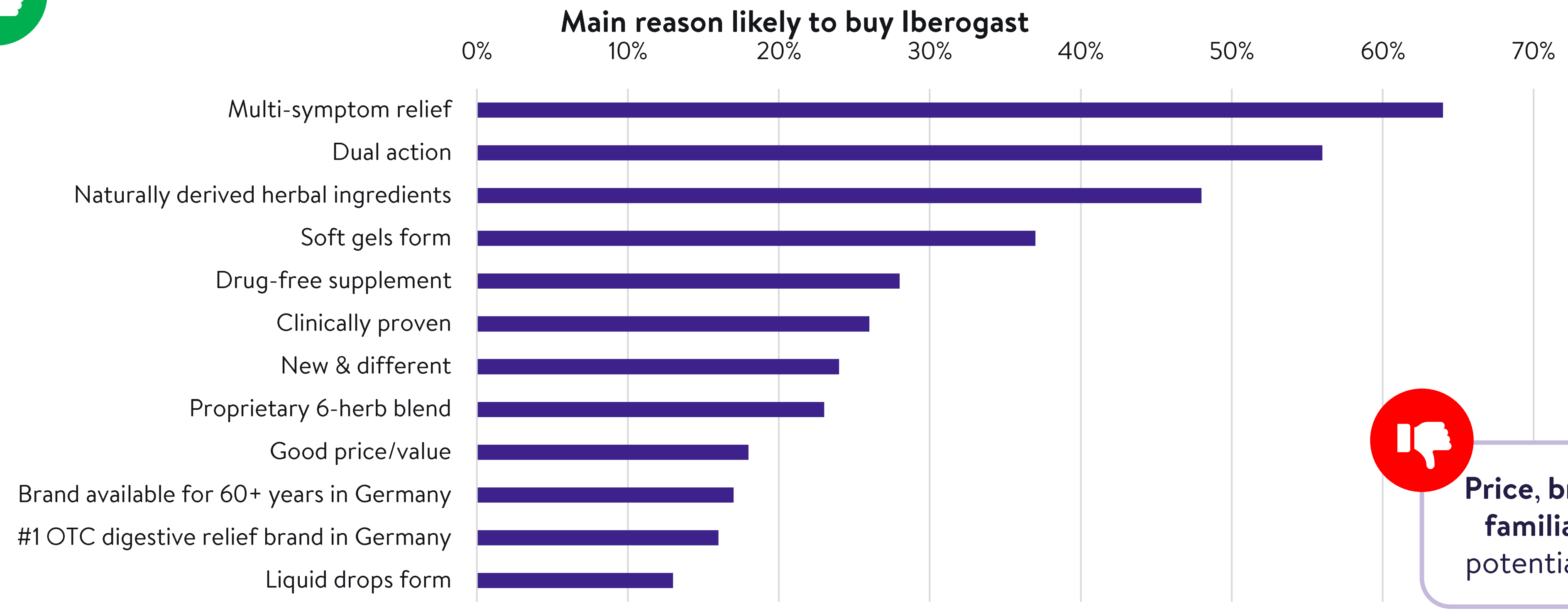
- "Liquids are **faster acting.**"
- "Soft gels will **trigger my stomach.**"
- "Seems to be a **bigger quantity for the price.**"
- "I try to **avoid taking pills** if possible. "
- "**I already take too many pills.** I think you get more for your money that way."
- "Seems like they would **work faster.**"

 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer

The approach: Iberogast Soft Gels vs Liquid Drops

Messaging around treating multiple symptoms, dual-action relief, and its naturally-derived herbal ingredients are the top drivers of interest in Iberogast.



Price, **brand** and **ingredient familiarity**, and **form** are potential purchase barriers.

 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer

The results: Key takeaways

Don’t assume you know

- Alka-Seltzer Fizzy Melts are positioned as a convenient, on-the-go remedy; however, **customers indicated that they would use the product equally at home and on-the-go** (with many verbatims around using the product when heartburn strikes in the middle of the night).

Refine your target

- With the flavor of MiraLAX Orange being polarizing, the team needed to further refine its target to better reach potential customers. Leveraging Shopper Behavior, they found many of the top items for a similar existing product are flavor-focused, highlighting the need to target these flavor-oriented customers. **Knowing what else is likely to be in their baskets helped the team get more surgical in the approach and complemented the survey learnings**.

New brand launches require an even deeper understanding

- As the team was developing the new Iberogast brand, it needed even more guidance prior to launch. For this project, they **expanded survey objectives to include form preference, shelf location, a deep dive into digestive conditions, and intended frequency to inform launch strategy**.

 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer

The results: Since adopting Customer Perception last year, the team at Bayer has leaned on it for numerous research projects.

90
Completed projects

20K
Walmart shoppers surveyed

285
Claims tested

75
Innovation concepts tested

 | *Source: Scintilla Customer Perception, August 2023

Scintilla Case Study: Bayer
The results: Sharing the insights

Bayer has embraced the learnings they have gained from Customer Perception and created an internal database for claims and concepts to share the opportunity for deeper insights with their team.

Research topics

- Innovation Sell-In Support
- Claims Testing
- PDP Optimization
- Packaging Testing
- Strategy Development

Database to establish norms

Walmart Luminate

Walmart Luminate Bayer Concept Testing Database + Tracker

Purpose: Create norms to benchmark against when testing new product innovation in Walmart Luminate.

Concept Name/Report Link	Category	Date Tested	Purchase Interest	Incrementality	Price Barrier	Is Price Top Barrier		Count/Pack Size	Notes	Sample
Tinactin 2-in-1 Powder	Foot Care	July 2023	33%	-	19%	No		90 grams (3oz)	Barriers: select one (second to prefer different form, 49%)	N=205 Walmart shoppers who bought any anti-fungal foot care products in P6M
Midol PMS Supplement	Pain	July 2023	28%	-	60%	Yes		30 capsules	Barriers: select one	N=229 females ages 18-54 who menstruate regularly + bought pain from WMT in P6M
Aleve Period Pain	Pain	July 2023	66%	-	3%	No		24 tablets	Barriers: select one (main barrier = satisfied with current menstrual treatment, price = lowest barrier)	N=229 females ages 18-54 who menstruate regularly + bought pain from WMT in P6M
Bayer Rapid Relief Powder Packs	Pain	July 2023	27%	-	38%	Yes		20ct 10ct	Barriers: select all (only asked for main RR concept)	N=230 Walmart shoppers who bought any OTC internal pain relief product in P6M, aspirin acceptors
Bayer Rapid Relief Caffeine Free Powder Packs	Pain	July 2023	26%	-	-	-		20ct 10ct	Only asked drivers/barriers for main RR concept; least likely to buy among all powder packs	N=230 Walmart shoppers who bought any OTC internal pain relief product in P6M, aspirin acceptors
Bayer Rapid Relief Body Pain Powder Packs	Pain	July 2023	30%	-	-	-		20ct 10ct	Only asked drivers/barriers for main RR concept	N=230 Walmart shoppers who bought any OTC internal pain relief product in P6M, aspirin acceptors
Bayer Back & Body Powder Packs	Pain	July 2023	31%	-	-	-		20ct 10ct	Only asked drivers/barriers for main RR concept	N=230 Walmart shoppers who bought any OTC internal pain relief product in P6M, aspirin acceptors
Bayer GBA Powder Packs	Pain	July 2023	23%	-	-	-		20ct 10ct	Only asked drivers/barriers for main RR concept	N=230 Walmart shoppers who bought any OTC internal pain relief product in P6M, aspirin acceptors
Bayer Heart Attack SOS Powder Packs	Pain	July 2023	41%	-	-	-		5ct	Only asked drivers/barriers for main RR concept; most likely to buy among all powder packs	N=230 Walmart shoppers who bought any OTC internal pain relief product in P6M, aspirin acceptors
Iberogast Softgels	Digestive Health	August 2023	36%	47%	53%	Yes		30 softgels	Barriers: select all (asked for both Iberogast forms in same Q); softgels form preferred when compared directly	N=195 Walmart shoppers who bought any DH product for themselves in P6M who are multi-symptom (2+) frequent sufferers

 | *Source: Scintilla Customer Perception, August 2023