

# PAIN MANAGEMENT - INDIAN CONSUMER - 2019

Addressing the right target audience and the untapped market will help in cash in on the OTC which has exciting times ahead.



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# Report Content

- What you need to know

## EXECUTIVE SUMMARY

- Addressing the untapped market & the right audience to cash in on OTC space
- Global retail market overview: OTC medications 2019
- Increase awareness of OTC so that it is considered safe and not just medicinal
- Build a safe image by creating not-so-serious formats and using natural ingredients
- Time to segment women as they are highest users of OTC
- Self medication should grow in a responsible and informed manner
- Introduce not-so-serious formats in OTC segment to dispel the fear of medicines

## KEY TRENDS

### Key Drivers

- Self medication coupled with a focus on rural and shift from Rx to OTC driving the market
- Shift in consumer attitude toward self-medication
- Rapid shift from Rx to OTC
- Brands which moved from Rx to OTC status gradually in India
- Rural market propelling growth
- Sedentary lifestyle leading to different kinds of aches
- High medical expenses underline OTC market

## CONSUMER INSIGHTS

- Know the 'OTC user'
- Profile data
- OTC provides quick relief in a time-effective way
- Indian market—lucrative market for pain management products
- Headache tops the list among the pains experienced
  - Graph 1: Any pain/injury experienced, December 2019
- How the regions choose their pain management remedies
- Sprays were the most commonly used format for pain relief
  - Graph 2: Pain relief products used in 12 months, Select, December 2019
- Take cue from Volini Maxx launched as the strongest pain relief spray

- 55+ were the main users
- Take cue from this brand targeting the older population
- Buying patterns based on tiers
- Most people in India use at least one pain relief product
- Most people in India use at least one pain relief product
- West India is a lucrative market for pain relief solutions
- OTC remedies are need-based purchases
  - Graph 3: Perception about OTC, December 2019
- Women suffer more than men
  - Graph 4: Pain/Injury experienced, Select, December 2019
- Target women as they use pain relief solutions more
- Take cue from Moov targeting women suffering from back aches
- North & West market suffers the most
- Target based on the formats popular regionwise
- Pharma companies building brand equity in creative ways
- Combiflam using social media to create pain management awareness
- Target working women with specific pain relief solutions
- Take cue from brand Iodex who are targeting working women
- Target unmarried and older women based on pains they suffer

## MARKET APPLICATION

### Opportunities

- Targeting the right consumer group and the rural market will boost returns
- Engage with medical practitioners
- Tap into the rural market which, has potential
- Typing up with self-help groups
- Typing up with start-ups like Udaan and Storeking to go rural
- Village Level Entrepreneurs to reach rural
- OTC should take the online route aggressively
- 'Elderly' market in India turns lucrative
- Target working women at their pain points
- North and West India– most lucrative
- Club health and wellness in OTC products

## WHO'S INNOVATING

### Local innovations

- Patanjali Balm
- Dr. Vaidya's Huff 'n' Kuff Ayurvedic Cough Syrup
- Nutree Pure Migraway Roll On
- Healing Arnica Joint and Muscle Pain Oil

## GLOBAL INNOVATIONS

- Natural innovation focuses on relieving work-related stress
- Natural microbiome-friendly probiotics can expand
- Natural formulas blur with food to bring a sense of familiarity and safety
- Create durable innovations to relieve and soothe in a holistic/natural way

## GLOBAL TRENDS PLAYING OUT IN INDIA

- How Mintel Trends are impacting OTC medications
- Bring fizzing/crackling sounds to topical medications
- 'Pods' add novelty to oral remedies and simplify the cold relief process
- Explore the digestion-aiding potential of trending activated charcoal

## APPENDIX

- Consumer survey methodology

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01

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02

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03

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