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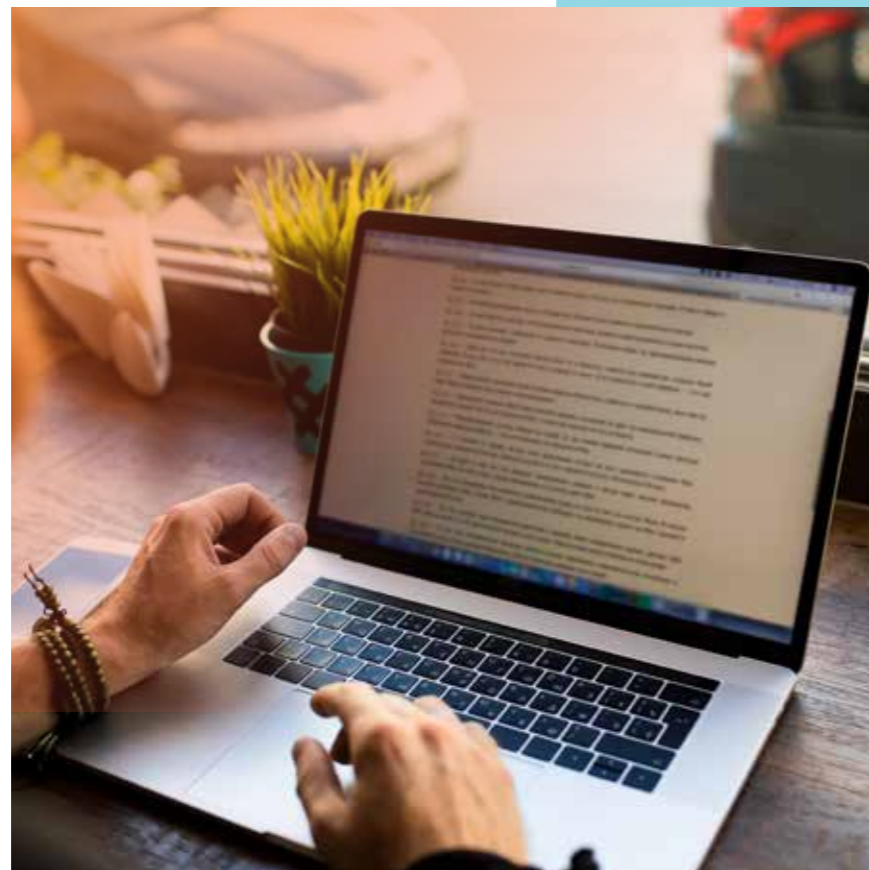
VALUE OF OTC IN INDIA

**ASSESSING THE
ECONOMIC POTENTIAL OF
SELF-MEDICATION**

A Joint Study by OPPI &
Havas Life Sorento - 2021



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SETTING THE CONTEXT

In more ways than one the current pandemic has changed the world, including India, in the way healthcare is accessed and delivered and even transformed supply chains. Along with increased teleconsultation, and digital physician access, responsible self-medication has also been accelerating in India, highlighting its potential in people's lives and the significant role it can play in improving lifestyle. Additionally, the 'new normal' has caused a behavioural shift leading to a change in people's attitude towards adopting responsible self-medication.

While the western world has had robust policy-based self-medication practices, in India too there has been a perceivable change in outlook. The word 'self-care' topped Google searches in India in 2020 with the enforcement of COVID-19 lockdowns. In fact, digital interventions through social networks, health apps and other tech-enabled solutions have been turning healthcare convenient and

cost-effective, thereby, increasing the possibility of patients resorting responsibly to self-medication.

India's overburdened healthcare system, plagued by shifting of disease patterns, shortage of doctors, unevenly spread healthcare services between rural and urban areas and the considerable out of pocket healthcare expense have all been making responsible self-medication an important constituent of national healthcare management.

There is a pertinent need to empower every citizen with responsible self-medication. It is the right of every citizen to have access to self-care options in the emerging 'new normal', and access to the right medication for their ailments at the right time. This can only be achieved through dissemination of clear and useful information that can in turn enhance health outcomes and reduce the burden on the national health system.

Awareness and education can enable people to self-treat and cure which can help save valuable resources of the national health systems. Self-medication can play a significant role in expanding access to safe and effective treatments. Indeed, there has been a shift in the value addition and usage of self-care in healthcare systems, not just in India, but across the world. For instance, the US healthcare system saves seven dollars for every dollar spent on OTC (Responsible self-medication). Contribution of self-medication can be even more pronounced in the developing world in easing the burden of healthcare systems and cutting down out of pocket expenses (OOP). Besides easing the burden on healthcare systems and helping reduce out of pocket spends, it eases the stress on the healthcare practitioners (HCPs) and pharmacists too.

The Global Self-Care Federation (GSCF) launched the Self-Care Readiness Index, in association with the World Health Organization (WHO) which serves as an innovative policy tool. Based on country level nuances, this tool helps in evaluating the robustness of the self-care system and recognising sustainable solutions. It holistically takes into account various parameters based on consumer/patient empowerment, stakeholder viewpoints, regulatory environment and more specifically, self-care health policy.

In India, the need for a self-care policy has been glaring. In order to highlight the synergy between self-medication and the health ecosystem in the country and to support regulators and policy makers in assessing the role of self-care in health systems, OPPI has collaborated with Havas Life Sorento to determine the 'Value of OTC (Responsible self-medication) in India' to assess the role of self-care in health systems. The result of the assessment is being published as this report which elaborates on the economic burden faced by the consumer.

The study findings indicate that there is an enormous potential for consumer behaviour to change positively and help increase the savings on healthcare spend by diverting treatment of minor ailments to self-medication. Also, there is a greater chance to showcase the significance of pharmacists, in assisting and supporting HCPs to reduce the disease burden and act as "self-care advisors" for the community.

I am sure that this report would help set the path to establish a robust OTC environment, rooted in patient centricity in the country, and pave the way for better health outcomes for all.



S Sridhar

President, Organisers of Pharmaceutical Producers of India
Managing Director, Pfizer India

Over-the-counter (OTC) regulations in India has been a topic of much debate and concern over the last many decades. Hence, it is heartening to know that we are now moving in a positive direction, having made progress in terms of key decisions such as classification of OTC drugs, labelling, advertisement and claims. Considering the rising importance being given to self-care practices by consumers, and the fact that India is among the top ten consumer healthcare markets globally, this would have been an imperative step sooner or later.

In continuation with the OTC policy framework released in 2018 it is our honour to have once again partnered with OPPI in conducting the 'Value of OTC' study for India which is a first of its kind in our country. It was felt that while we recognize the health benefits of having OTC medication, it is also essential to decipher the economic benefits of self-medication vs spends on healthcare professionals (HCPs). This would determine the potential areas where access to OTC medication would have greater impact. The key enablers could then be framed to meet the larger goal of last mile access to healthcare solutions as well as information and professional interventions, including the pharmacist.

As per the study findings, annual healthcare spends mounted up to Rs.35,820 cr. for 27 minor ailments, a huge burden for out-of-pocket expenditure. Of this, Rs.30,730 cr. was accounted for by HCP spends, mainly due to professional fees and prescription medicine costs, supplemented by diagnostics, transportation costs and productivity loss.

There is immense potential to save a significant amount of the HCP spends if consumers are given the confidence to self-medicate; it will also facilitate time and resources to attend to more critical cases. Yet, at the same time, we need to acknowledge the unwavering trust placed in the HCP's prescription to self-medicate over a period. Promotional Rx-to-OTC switches stand to gain immensely in this scenario as it creates a win-win situation for all stakeholders, given the familiarity and trust in such brands. The study also highlights that it is time to re-think the role of the pharmacist, who can play an integral role in driving responsible self-medication, another key tenet of our OTC policy guidelines.

The current COVID-19 pandemic has been a grim reminder of our healthcare infrastructure challenges. And the silver lining to draw from this situation is to reframe our healthcare policies to make them more inclusive and comprehensive, with a consumer centric approach.



FOREWORD

HAVAS LIFE SORENTO



Susan Josi

Managing Director- HHY South East Asia & Middle East
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ACKNOWLEDGEMENT







We thank and acknowledge the inputs and guidance of Mr. S Sridhar, President – OPPI and Managing Director, Pfizer India Pvt Ltd; Mr. K G Ananthkrishnan – Director General, OPPI; Mr. G Sathya Narayanan, Chair – OPPI OTC Taskforce and Managing Director – South Asia, Galderma India Pvt Ltd; Mr. Milind Thatte, Chair - OPPI OTC Taskforce and Managing Director, Procter & Gamble Health Ltd. Their passionate commitment has immensely helped in framing robust Value of OTC in India for assessing the economic potential of self-medication.

We take this opportunity to thank Nitika Garg - Director Research, OPPI for research and collaboration with every member of OTC, IPA and FICCI Taskforce for their contribution.

We also thank our knowledge partner, Havas Life Sorento for designing this study, executing it and for producing this whitepaper.



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SECTION 1

INTRODUCTION



“WHO defines self-care as the ability of individuals, families and communities to promote health, prevent disease, maintain health and to cope with illness and disability with or without the support of a healthcare provider.”

A growing interest in personal well-being aided with easier and faster access to information has led to a spurt in self-care with consumers wanting to take control of their personal health, especially now. The World Health Organization defines self-care to be what people do for themselves to establish and maintain health, and to prevent and deal with illness with or without the support of a healthcare provider. It encompasses several issues including hygiene, nutrition, lifestyle, environmental, socio-economic factors and self-medication.

In the prevailing environment, understandably so, 'self-care' has topped the Google search engine in 2020 with the enforcement of COVID-19 pandemic induced lockdowns across India.¹ Consumers are left with no option but to resort to various holistic health and wellness practices, prevention as well as self-medication with over-the-counter (OTC) medication due to restricted access to healthcare professionals (HCPs).

Prior to the pandemic as well, India has seen a doubling of self-medication rates from 23% in 2006 to 41% in 2016, according to a 2016 CubeX Mirror OTC report. 50% of HCPs, who were part of the same 2016 OTC study, reiterated that their patients visited them after initially having tried OTC medication. The role of the digital medium

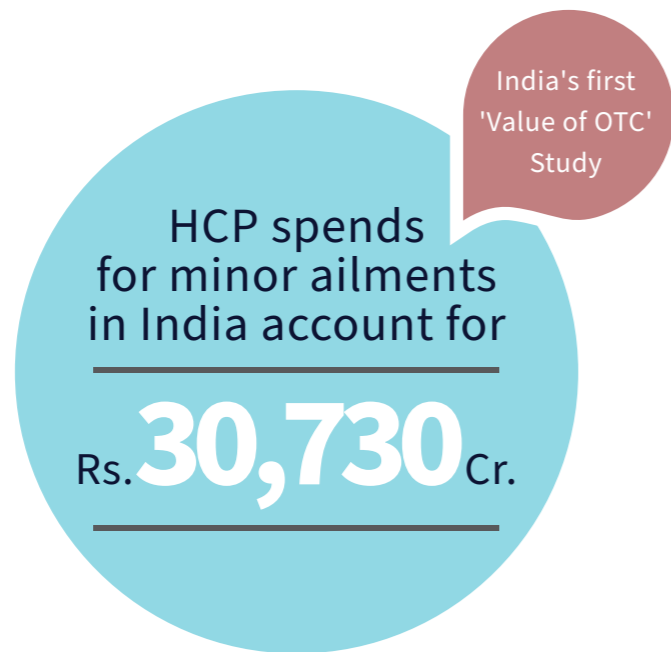
and smart phones with quick and easy access to information on the internet has further fueled the shift. Since self-medication has always been viewed as a convenient solution for the management or treatment of commonly occurring self-recognized ailments with minimal intervention from HCPs, accessibility to regulated Over the Counter (OTC) medicines could be the way forward.

This was also echoed by Dr. V.G. Somani, Drug Controller General (India), Ministry of Health & Family Welfare, Government of India, at a webinar on Self-Care for Self-Reliant India, organised by FICCI in early June 2021. “By raising health awareness and putting in place well-defined regulations, consumers can be empowered to take proactive measures to manage minor ailments while undertaking preventive action to boost immunity, reducing the need for healthcare practitioner interventions,” he said.²

However, there is no study in India currently that quantifies the benefits of self-medication to help regulators, marketers and all-important stakeholders like HCPs, pharmacists, nutritionists and physiotherapists to determine the benefits and the implications of increasing access to OTC medication in India.



Incidentally, several countries across the world have already realized the economic value of OTC. For instance in the US, according to a National Institute of Health report, 93% of adults prefer to treat their minor ailments with OTC medicines before seeking professional care, and 85% American parents prefer to treat their children’s minor ailments with an OTC medicine before seeking professional intervention.³ The fact is, for millions of Americans, OTC medicines are accessible, relied upon and effective.



Self-care is not a new concept, yet despite growing support on its role and value in the healthcare continuum, opposition exists and it is not embedded in global health systems as it should be.

There are many misconceptions around the concept of self-care and the benefits that self-care brings to health systems and consumer health outcomes.

One of the most effective methods of transforming opposition to support is to demonstrate the value of self-care by showing the evidence on a social, health, and economic level.

This will also help to garner support from policy makers around the world. We congratulate OPPI for producing this timely report on the value of OTCs in India.

It is a clear demonstration of the value self-care brings to health systems and individuals and it will support our global study on the Economic & Social Value of Self-Care .

We can all learn from each other and look at what other nations are doing to embrace self-care on a policy level – the UK is moving forward in terms of self-care policy and perhaps India could draw inspiration from them. We are delighted that India is included in the second phase of our Self-Care Readiness Index to be launched in September 2022, and hope that these findings will be insightful.



Judy Stenmark
Director General,
Global Self-Care Federation



According to the Value of OTC medicines to the U.S. Healthcare System, March 2019 report, availability of OTC medicines provides \$146 billion in value to the US healthcare system annually. On an average, every dollar spent by the consumer on OTC medicines saves \$7.2 for the U.S. healthcare system.⁴ Besides, if OTC medicines did not exist, an additional 56,000 medical practitioners would need to work full time to accommodate the increase in office visits by patients seeking prescriptions for self-treatable conditions and ailments.⁵



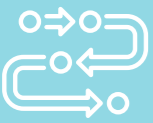
In Europe too, it is estimated that moving even 5% of prescribed medications to non-prescription status, would result in total annual savings of more than € 16 billion, according to the Health Economic Benefits of Self-care in Europe (2020).⁶ According to a Value of the OTC medicines in the Brazilian Public Health System study, it was deduced that responsible use of OTC medicines can reduce up to 21% of the volume of emergency medical attendances. For every BLR 1 spent on OTC drugs, it is equivalent to a saving of BLR 7 in the public health system with reduced emergency visits.⁷



Like these countries, India too can benefit immensely from the availability of OTC medicines in terms of economic benefits, along with improvement in overall health outcomes. Thus, OPPI, in collaboration with Havas Life Sorento, embarked on a first of its kind study in India to determine the ‘Value of OTC in India’. With regulated OTC medicines, the savings can be significant considering that total HCP spends for minor ailments account for Rs.30,730 cr., 70% of which is consultation fees and prescription medicines.



Such a study would also be beneficial to understand the key ailments where the cost-benefit implications are prominent, as these would be highly potential OTC segments. Marketing strategies too could be remodeled with patient/consumer-centric focus and to promote responsible self-medication. With COVID 19 further projecting the potential role of self-care, it could come as a timely intervention to aid the country’s staggering healthcare systems.



SECTION 2

STUDY METHODOLOGY

2.1 AILMENTS CONSIDERED

To understand the incidence and treatment approach for various ailments considered under OTC, it was imperative to identify medical complaints that are commonly treated through self-medication. As a result, 27 common ailments across six OTC categories were considered as part of our study.

The six OTC categories include ailments arising from gastro-intestinal related symptoms, cough, cold and allergy, dermatology, pain management, general health like immunity-related and tiredness, and lifestyle related affliction or complaints.

27

Common ailments which tend to witness self-medication

GI: Acidity; Indigestion; Constipation; Diarrhea/dehydration

CCA: Cold; Cough; Allergy - nasal

ANALGESICS: Headache; Joint Pain; Back Ache; Menstrual Pain; Body Ache; Fever; Dental Pain

DERMA: Rashes/ring worm; Acne; Feminine/intimate Hygiene; Cuts/burns/wounds; Allergy-skin; dry skin/eczema

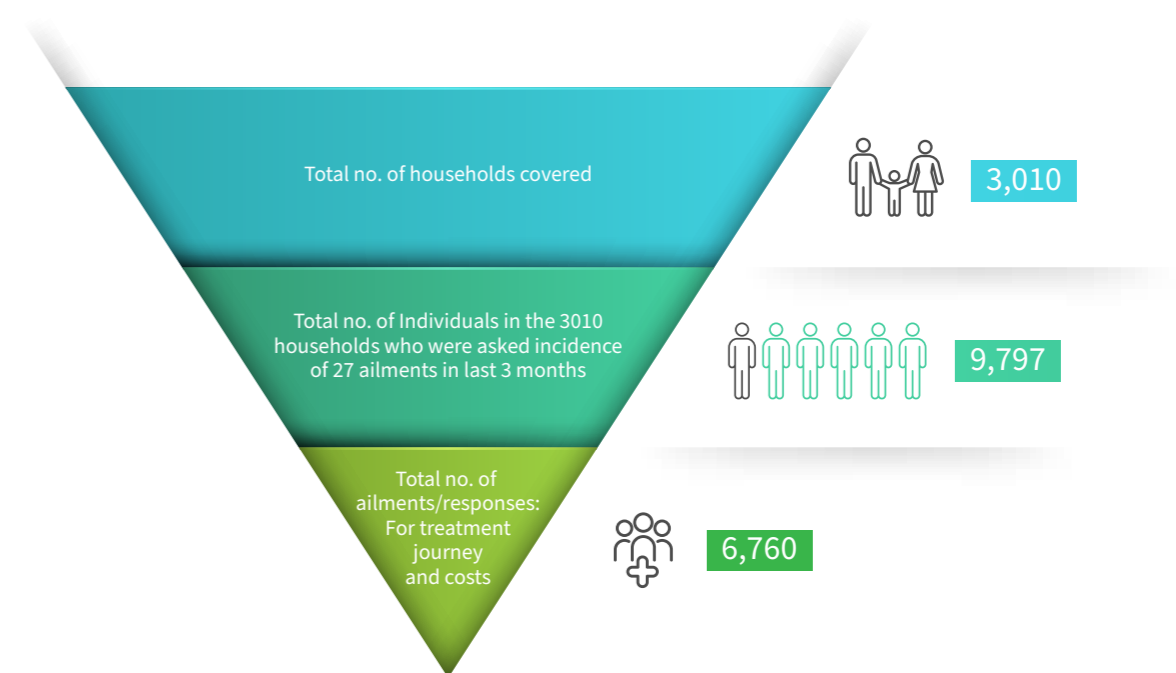
GENERAL HEALTH: Weakness/Tiredness; Immunity-related; Bone Health; Anemia

LIFESTYLE-RELATED: Eye Strain; Sleeplessness, Smoking control



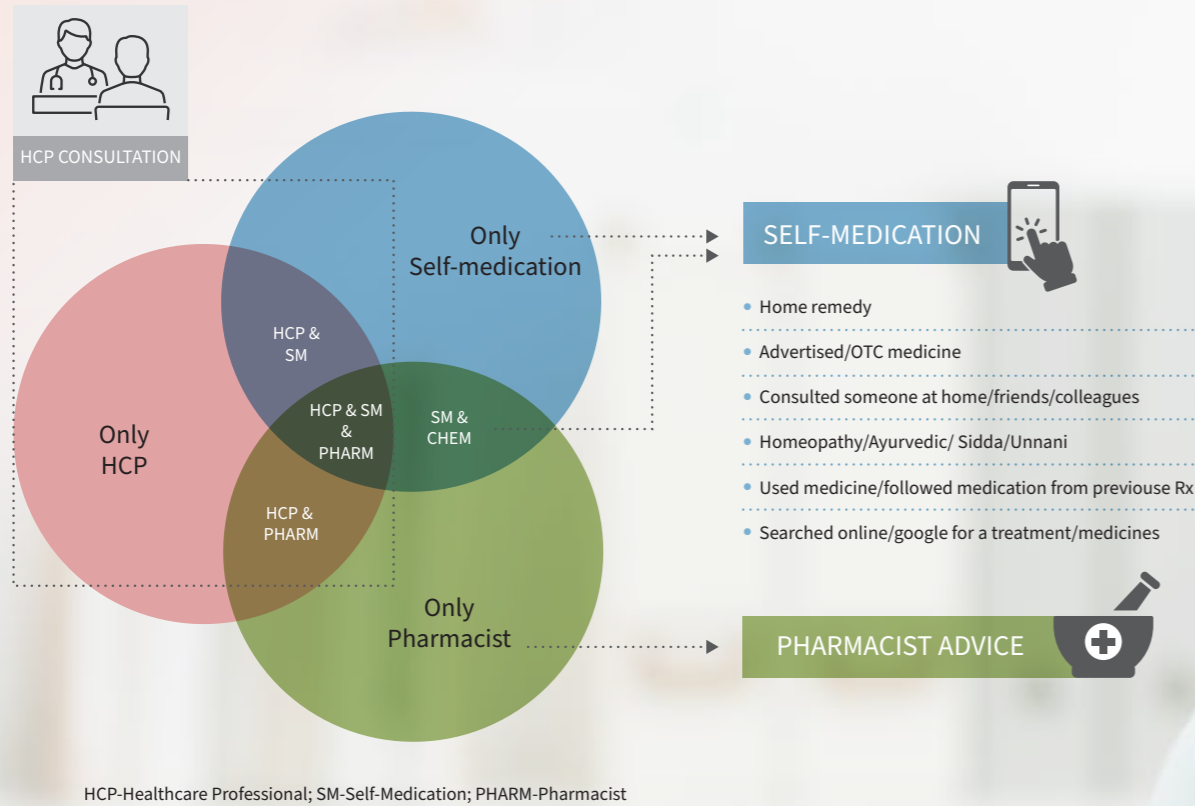
2.2 RESPONDENT PROFILE AND UNIVERSE DEFINITION

The target audience comprised housewife/decision maker on medical care and spends, with the age of the sufferer being 12+ years belonging to NCCS A and B. The sample coverage was spread across India's top 25 metros, tier 1 and tier 2 cities. A total of 3,010 households were contacted in the period from February to early March 2021. Both, ailment incidence and ailment responses (including treatment journey and costs) were projected to 123 Mn population (Source: IRS 2019) who formed our universe representing 95 top towns with 0.5 Mn+ population belonging to NCCS A and B, above the age of 12 years.



Projected to 123 Mn in 95 towns with 0.5 Mn+ population (age 12 years+, NCCS A and B).

2.3 TREATMENT APPROACH DEFINITION



Consumers often tend to adopt a combination of treatment approaches even for minor ailments. For example, consumers tend to self-medicate on the initial onset of symptoms and may decide to seek professional advice to validate their decision or to rule out underlying conditions. Additionally, if the symptoms do not subside or intensify, they visit the HCP. Hence, for the purpose of this study, under HCP consultation we have classified those who sought only HCP's advice as well as those who self-medicated and also visited the HCP as it indicates consumers' need for validation with professional advice or lack of confidence to self-medicate. Also, those who sought pharmacists' advice along with HCP's advice, with/without self-medication, have been considered under HCP consultation. 'Self-medication' approach includes those who only self-medicated or sought opinion of the pharmacist along with self-medication.

Key considerations and assumptions for the study have been detailed in the annexure.





SECTION 3

INCIDENCE AND TREATMENT APPROACH



3.1 INCIDENCE AND FREQUENCY OF AILMENT OCCURRENCE

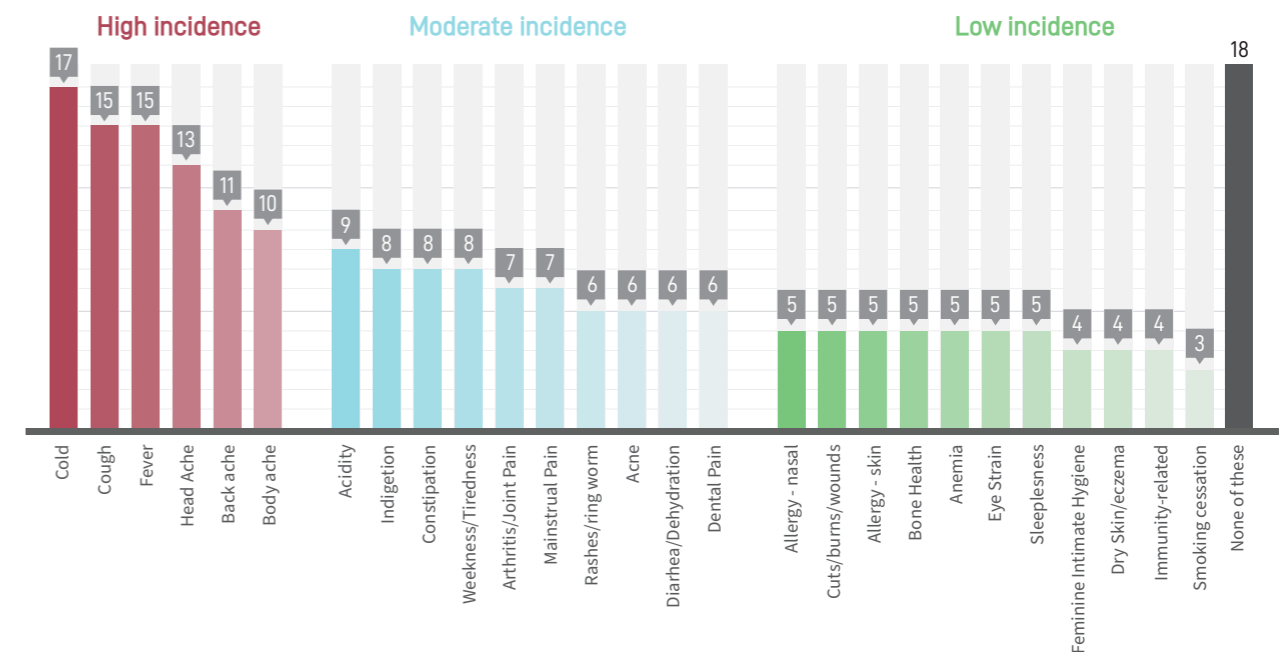
Acidity and menstrual cramps have the highest frequency of occurrence annually

When considering ailments that can be self-treated, the list predominantly comprises respiratory ailments such as cough and cold, aches/pains and gastro-intestinal related ailments such as acidity, indigestion, constipation. The current study findings are almost congruent with this. However, a decline in the incidence of gastro-intestinal ailments was observed in this study, possibly due to the adoption of healthy meals to a larger extent during lockdown and the first unlock phase of the COVID-19 pandemic.

On an average, two ailments were reported per person in the preceding three months of the study phase. The average frequency of occurrence of most ailments is three to four times a year; acidity and menstrual cramps were reported to occur five times a year.

Average frequency of occurrence of ailments annually is **3.66** per person

Average no. of Ailments reported - 2.02



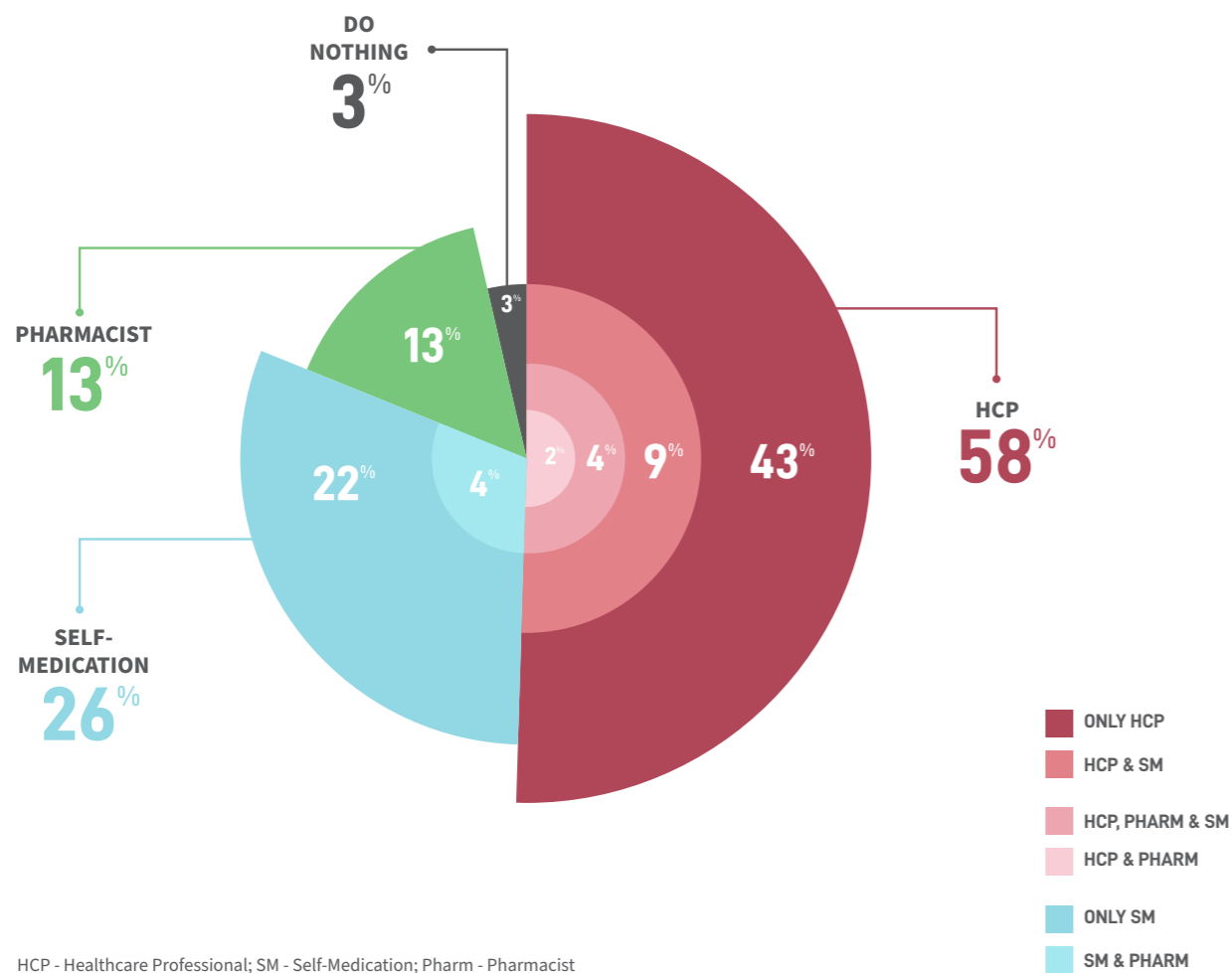
All India - All figures in %

Individuals Base : 9,797, projected to: 12,29,65,000 – for our Urban TG Universe
*last 3 months prior to Feb 2021



3.2 TREATMENT APPROACH

26% respondents adopted self-medication; an additional 13% consulted the HCP as well



HCP - Healthcare Professional; SM - Self-Medication; Pharm - Pharmacist

Self-medication was reported by 26% of the respondents, which includes those who only self-medicated and those who also sought the advice of the pharmacist. Apart from cough and cold, gastro-intestinal ailments such as acidity, indigestion; dermatology related needs such as acne and eczema; majority of the pain conditions such as headache, back ache, body ache along with menstrual pain also reflected high self-medication (over 25% of the sufferers of each respective ailment).

At an overall level, total 13% of the respondents visited the HCP and also self-medicated, with or without additional intervention from the pharmacist. This was mainly observed for fever, dental pain, back ache, joint pain, acidity and cold (15%-20% of the sufferers).

The COVID-19 pandemic has led to higher than expected HCP intervention - 58% of respondents visited the HCP for consultation. This also includes 13% of them who self-medicated as well. This is possibly because the responses were related to the occurrence period which coincided with the lag phase of the first wave (Nov'20-Jan21), when it was

12 out of the 27 ailments under consideration witnessed self-medication by at least

25%
of the sufferers

more feasible to visit the HCP. During the lockdown, consumers had little or no access to HCPs and medical facilities. Of those who visited the HCP, 93% of them visited in person and the remaining, either tele-consulted or used an online platform.

Symptoms related to respiratory ailments may have warranted an HCP visit to rule out COVID related symptoms. Even for general health related concerns including weakness/tiredness and immunity, HCP intervention was found to be high, apart from anaemia and bone health. This could be attributable to the pandemic as consumers would have sought expert advice on best possible solutions to enhance their overall health.

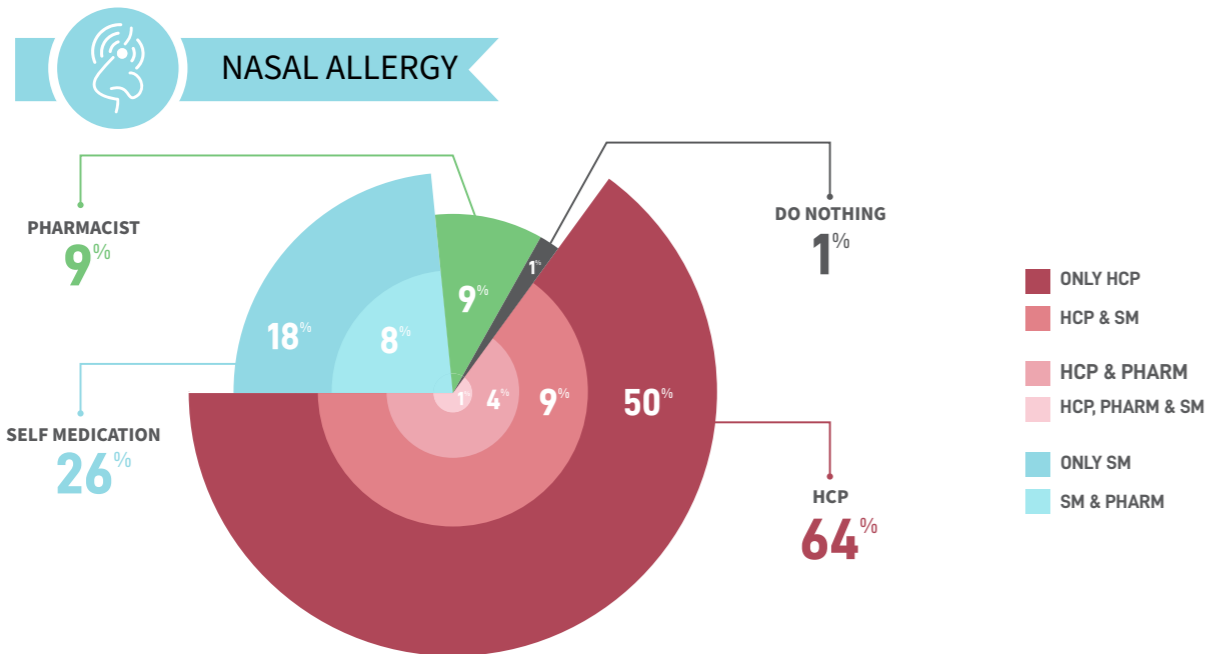


Ailments	% sufferers who self-medicate
Cold	41
Cuts, burns, wounds	40
Cough	36
Head ache	34
Acidity	33
Indigestion	31
Body ache	31
Dry skin / Eczema	30
Back ache	28
Acne	27
Allergy - Nasal	26
Menstrual pain	25





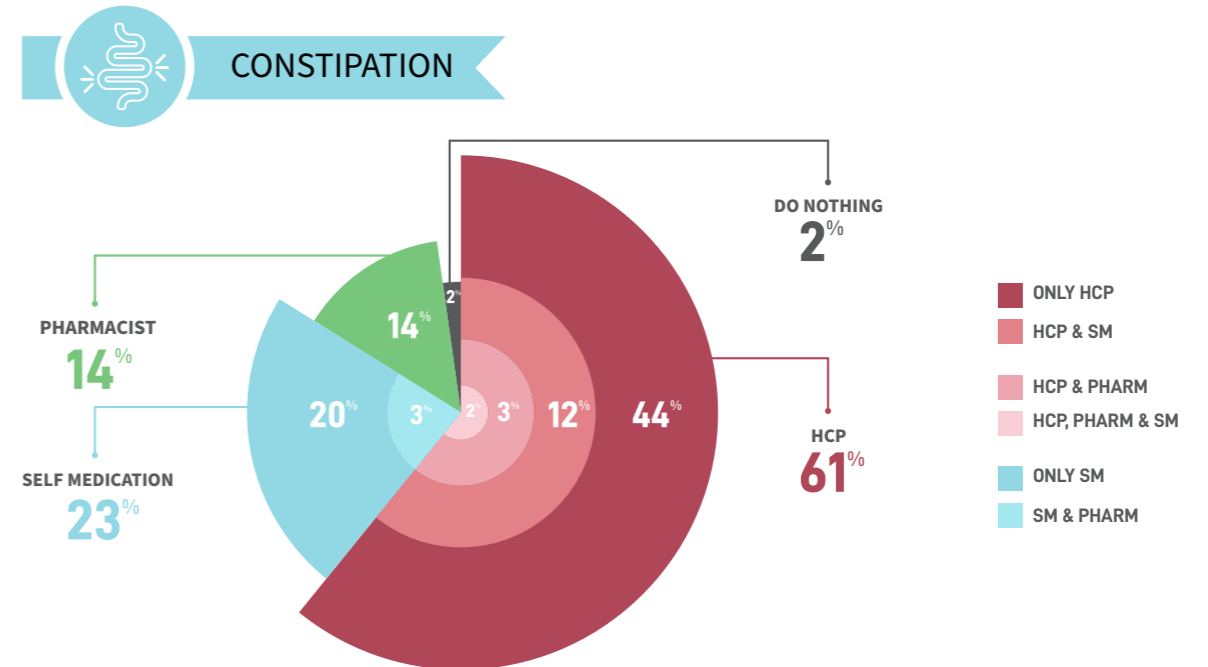
Allergies are one of the potential areas for higher self-medication



HCP - Healthcare Professional; SM - Self-Medication; Pharm - Pharmacist

In conditions such as nasal allergy, while 26% of sufferers self-medicated, high skew towards HCP intervention (50% of sufferers) was observed. It indicates that self-medication is restricted unless the sufferer is aware of the condition and its management. In the larger population, consumer awareness about the condition and related symptoms as well as lack of OTC brands due to regulatory constraints appears to be low. High skew towards HCPs was also seen for skin allergy (urticaria), feminine intimate hygiene, diarrhoea and eye strain.

Conditions like constipation and joint pain too could benefit from more awareness about effective and credible solutions which are easily accessible to consumers.



HCP - Healthcare Professional; SM - Self-Medication; Pharm - Pharmacist

The role of the pharmacist is limited in the consumers' treatment journey

The role of the pharmacists appears to be a concern in the treatment journey as only 13% chose to approach them at an overall level. Pharmacist advice is largely sought for acidity (31% of the sufferers), followed by indigestion, rashes/ringworm, headache, body ache (approx. 20% of the sufferers of each of these ailments). Pharmacists could be empowered to become 'self-care advisors', thus taking the load off HCPs, especially during a healthcare crisis of this magnitude.

Only **13%** chose to seek pharmacist advice alone, indicating minimal role of the pharmacist in the treatment journey.

Ailments	% sufferers who sought pharmacist's advice
Acidity	31
Rashes / ring worm	19
Head ache	19
Body ache	19
Indigestion	18
Cough	16
Weakness/Tiredness	15
Fever	15
Constipation	14
Diarrhoea	13

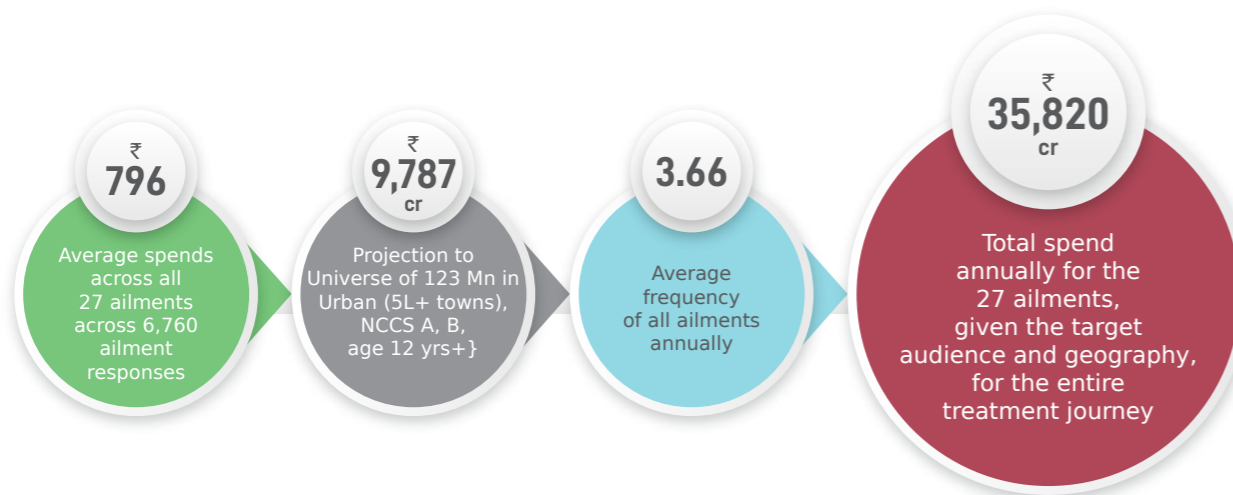


SECTION 4

ECONOMIC BENEFITS OF OTC MEDICATION

27 minor ailments accounted for a staggering Rs.35,820 cr annual healthcare spends

Considering the healthcare spends based on 6,760 individual responses, the average cost per incidence was found to be Rs.796 per person irrespective of the treatment method (HCP consultation, self-medication or pharmacist advice). With an average occurrence of each ailment at 3.66 times a year, the total spend across 27 ailments amounts to Rs.35,820 cr. annually, when projected to the universe of 123 Mn consumers. Considering the fact that this is out-of-pocket expenditure, it is a huge burden on the population.



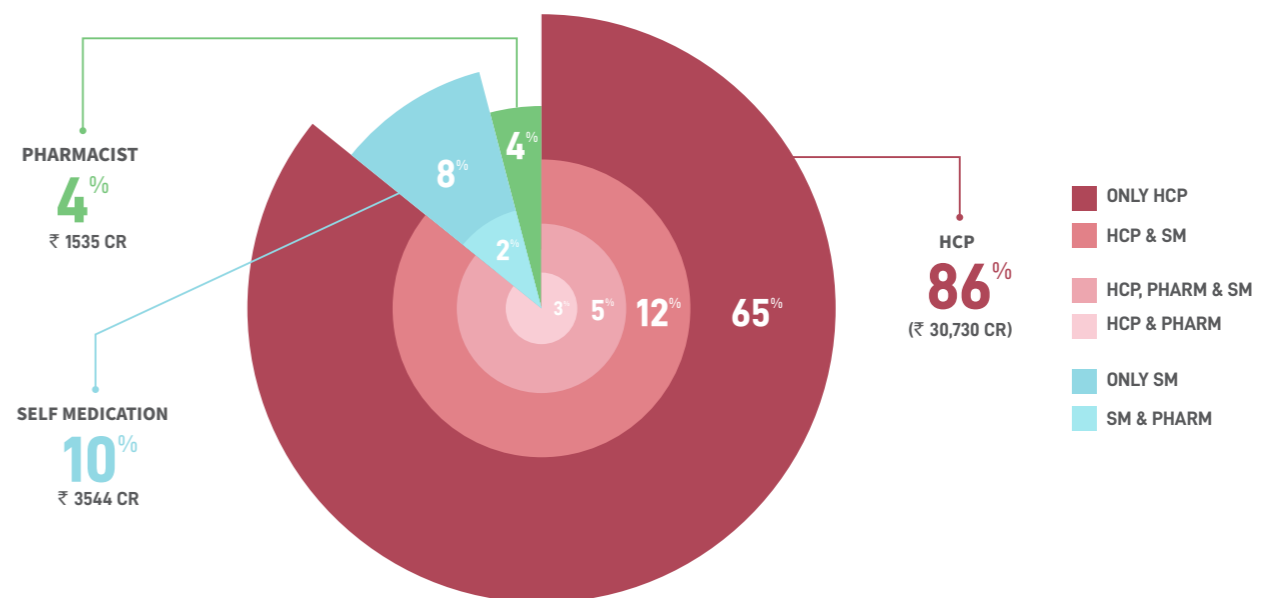
HCP spends contributed 86% to the total healthcare spends while self-medication accounted for only 10%

Out of the total healthcare spends of Rs.35,820 cr. for the 27 ailments under consideration, 86% is attributable to HCP spends. 43% of respondents who only consulted the HCP contributed to 65% of the total spends, while those who self-medicated (26%) contributed a modest 10% of the spends.

43%
of respondents who only consulted the HCP contributed to **65%** of the total spends.

TREATMENT SPEND*

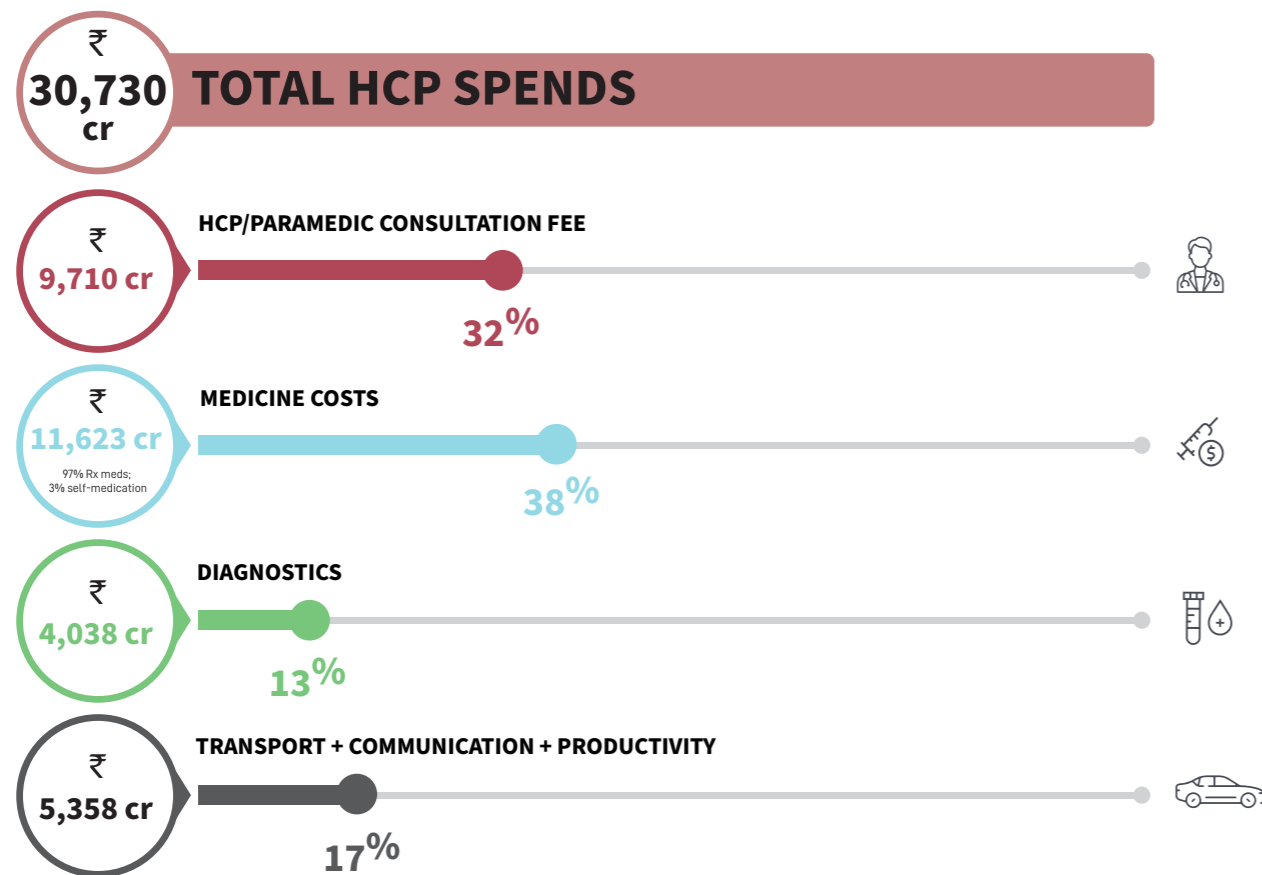
BASE - RS. 35,820 Cr



HCP consultation fees and prescription medicine costs comprise a major portion of total HCP spends

Highest HCP-related spends are attributable to medicine costs (possibly, co-therapy with multiple solutions), followed by consultation fees; both together account for 70% of total HCP spends. This is supplemented by additional factors such as diagnostics, transportation and productivity losses. Thus, self-medication for minor ailments can lead to significant savings for consumers.

In cases where consumers self-medicate as well as visit the HCP, this could be a potential area for immediate savings if consumers are empowered and given more confidence to self-medicate with the right solutions.



HCP consultation fees are similar across tiers while total medicine costs (Rx, self-medication and pharmacist advice) and diagnostic costs rise in tier I and II cities vs metros. Transport costs are relatively higher in tier II cities vs metros and tier I. In metros and tier II cities, pharmacist advice is given more weightage vs tier I cities.

	ALL	METRO	TIER I	TIER II
HCP/PARAMEDIC CONSULTATION FEE	217	211	218	229
MEDICINE COSTS	336	295	387	362
DIAGNOSTIC COSTS	92	62	96	137
TRANSPORT + COMMUNICATION + PRODUCTIVITY	150	163	111	162
TOTAL	795	731	812	890

Base: 6760 responses

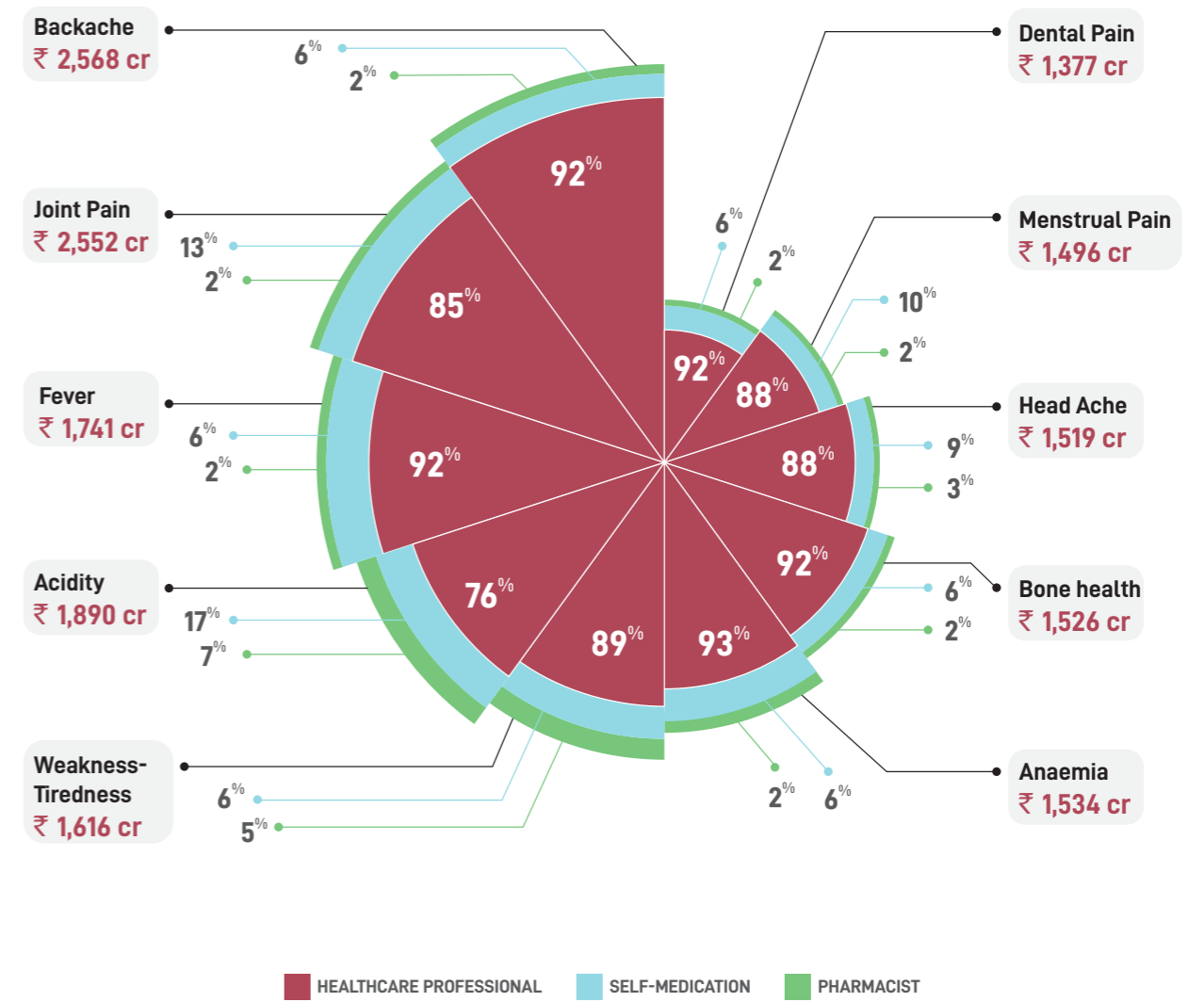




Pain related ailments accounted for highest HCP spends

Pain related ailments such as backache and joint pain top the chart in terms of highest total spends (as well as highest HCP spends), accounting for total spends valued at Rs.2,568 cr. and Rs.2,552 cr. respectively. This is attributable to high incidence (5.7 Mn and 4.5 Mn for back ache and joint pain respectively) as well as high spends per occurrence (over Rs.1,000 per person for each of these ailments) with approximately four occurrences in a year. Also, six out of seven common pain ailments (barring body ache) feature among the top 10 ailments by HCP spend.

Pain related ailments such as back and joint pain were found to incur total spends over **Rs. 2,500 cr.** annually, majority of which is HCP spends.



Apart from high HCP spends, joint pain also accounts for highest self-medication spends at Rs.328 cr. Although topical solutions are widely available for commonly occurring pain conditions such as backache and joint pain, they are largely effective for mild-moderate conditions. There is a lack of systemic products available OTC due to regulatory barriers which could otherwise help address moderate severity of symptoms in backache, body ache and menstrual pain. This could explain the fact that these conditions witness a combination of HCP consultation as well as self-medication in the search for effective solutions. This could be a potential segment for new OTC analgesics with differentiated proposition for specific types of pain as well as nutraceutical supplements for recurring conditions such as joint pain.



High self-medication ailments have the potential for maximum savings

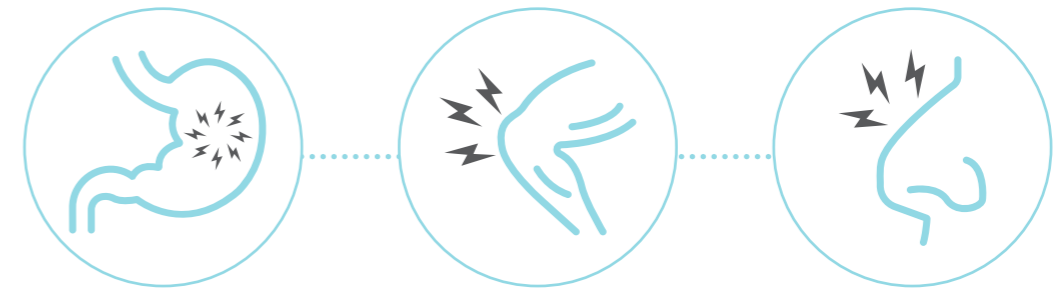
In case of high self-medication ailments (in which more than 25% of sufferers adopted self-medication), HCP spends cumulatively amounted to Rs.13,278 cr. which is 43% of total HCP spends.

There is a high frequency of occurrence of 4-5 times a year and relatively high incidence of over 4.5 Mn for ailments such as acidity, constipation, acne, cough and cold; however, cost per incidence is relatively low, ranging between approx. Rs.400-Rs.700 per person, leading to total annual spends ranging between Rs.1,000-1,500 cr., barring acidity which is on the higher side (Rs.1,891 cr.).

Acidity features among top 5 ailments by HCP, self-medication as well as pharmacist

Massive savings upto
43%
can be incurred through
**12 ailments, in which
more than 25% of sufferers
adopted self-medication.**

spends. It is the second highest by self-medication spends at Rs.321 cr. This indicates the need for various OTC solutions such as antacids gels or proton pump inhibitors along with consumer awareness and pharmacist intervention to promote usage of right solutions as per the symptoms.



Pharmacist intervention was highest for body ache, smoking control, acidity and constipation

In case of ailments such as body ache which accounted for highest share (19%) of total spends on pharmacist advice amounting to Rs.1,535 cr., it was found that HCP spends were relatively much lower at Rs.927 cr. Other ailments such as smoking control, acidity and constipation (each having a share of 8-9%) also reported relatively lower HCP spends (less than Rs.1500 cr.).

There are many other areas to drive pharmacist intervention such as anaemia, skin and nasal allergy as well as conditions such as diarrhoea and sleeplessness where easy access to professionals is needed.

Ailments such as body ache with high pharmacist intervention had lower HCP spends.

Scope to reduce HCP spends in allergy management

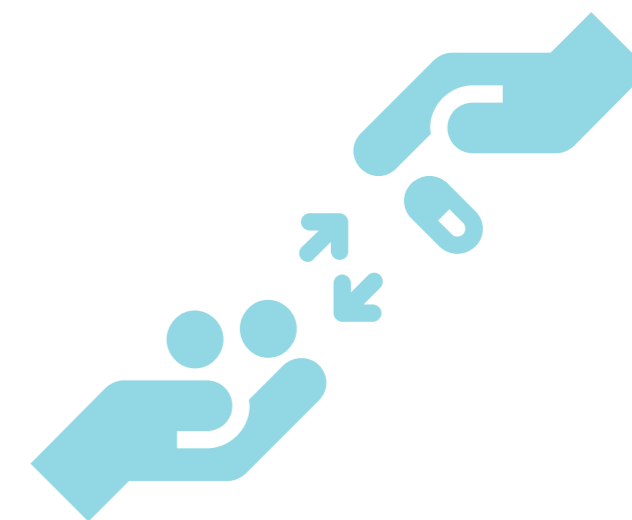
On the other hand, ailments like skin & nasal allergy and feminine intimate hygiene reported less than 4 Mn sufferers with relatively lesser frequency of 2-3 times a year. However, cost per incidence per person was high (Rs.1,033 for skin allergy, Rs.1,025 for feminine intimate hygiene and Rs.772 for nasal allergy). Thus, the annual spends almost touched Rs.1,000 cr. mark as these ailments are highly driven by professional advice. Consumer awareness regarding the condition along with availability of OTC solutions and pharmacist advice can drive self-medication and lower the spends.





SECTION 5

UNLOCKING THE ECONOMIC VALUE OF OTC



The study projects the fact that consumers stand to gain immensely through self-medication over HCP spends for the treatment of minor ailments, thereby proving the potential of an OTC enabled environment in India. At the same time, it is also apparent that consumers place immense trust in HCPs for the management of minor ailments. Typically, continued reference to the HCP's prescription raises confidence in consumers over time to self-medicate when symptoms are manageable. This also translates to greater acceptance of promotional Rx-to-OTC switches.

In cases where the symptoms cross the threshold but are still not too severe, as observed in the case of pain conditions or acidity, certain medication may be needed (such as systemic analgesics/ proton-pump inhibitors), along with the currently available OTC solutions. However, lack of regulations for the OTC sale of these drugs could lead to uninformed decisions in using the right medication and their dosages. It eventually requires HCP visits, leading to higher spends. Regulatory authorities could give due consideration to such formulations in the context of OTC policy guidelines.

The study is a step further to highlight that there is a need to re-define the role of the pharmacist and expand the scope in order to aid consumers in screening symptoms and selecting the right solutions. They can counsel them on various aspects such as the right strength and dosage and can also direct them towards professional advice when required. Conditions like nasal and skin allergy, which otherwise witness relatively high HCP spends, are some of the key areas where pharmacist advocacy could ease the load.

Responsible self-medication should be the way forward if we create an environment to empower consumers. Consumer healthcare marketers have a vital role to play by building consumer awareness regarding symptoms and solutions as well as timely professional intervention.

Overall, there has been a steady and conscious shift towards health and wellness. With rising medication costs, consumers are wanting to invest in health and wellness. And post the pandemic, self-care solutions could witness higher demand. However, the success in driving responsible self-care decisions by consumers is largely dependent on four key enablers:



In India, we can purchase any kind of medicines from a Chemist & Druggist store without a legitimate prescription from registered Health Care Professionals (HCP), which is not only unsafe but promotes self-medication in an irrational manner. The report on the Value of OTC is not only timely but a necessity to trigger the need for a robust policy on OTC Medicines in India as per global best practices and update the existing OTC list by expanding the scope in a scientific manner based on responsible self-medication with easy to understand and user-friendly guidelines. Consumer education on the benefits of OTC and prescription medicines is paramount. The notification of the OTC Policy Framework of 2018 should be immediately revised based on the recommendations made in the report, which will enable patients to save money and make healthcare affordable and accessible.

Indian consumers need to be empowered to differentiate between common ailments and critical care in order to avoid irrational use of medicines and irresponsible self-medication. Educating the HCP to strictly follow the best prescription practices and the pharmacies to adopt the best pharmacy practices is the urgent need of the day.

Prof. Bejon Kumar Misra
Founder, Patient Safety & Access



EMPOWERMENT

Empowered individuals can take well-informed decisions about their health and well-being, becoming brand ambassadors of 'self-care'. In India, at least nine out of ten adults suffer from low health literacy.⁸ Yet, self-medication is known to be high in India. Hence, there is a need to ensure responsible self-medication with defined guidelines.



ENCOURAGEMENT

The government can create a favourable switch policy for potential OTC drugs which are safe, effective and have a high level of trust among HCPs. We could also draw inspiration from global counterparts who have built pharmacists as a strong ally to the consumer and thereby, encourage consumers to leverage the community pharmacist.



ENGAGEMENT

HCPs can be engaged strategically for developing inputs in disseminating information to pharmacists and consumers on various conditions and their management, thereby allowing them more time and resources to focus on other critical health issues.



ENFORCEMENT

The development of a robust policy with clear guidelines and implementation for promotion and sale of OTC drugs will ease the current uncertainties. Additionally, restricted access to medicines which are to be dispensed only on prescription of an HCP will also be imperative.

The pandemic has forced us to re-evaluate our healthcare systems. With self-reliance being touted as the new mantra, there is a need to expand its scope where every person is enabled access to healthcare. There could not have been a better time for creating a more enabling environment which will ultimately lead to better health outcomes.



ANNEXURE

REFERENCES:

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KEY CONSIDERATIONS AND ASSUMPTIONS:

- 1 COVID-19 related ailments such as cold, cough, headache, nasal allergy (CCA) and fever (Analgesics) would be a concern as respondents would have refrained/avoided answering questions pertaining to these ailments. Respondents may not have wanted to talk about them, or data provided may not be accurate, due to fear of any checks from government agencies. Given the likely bias, we cannot be sure on the incidence of these ailments, where self-medication is prominent.
- 2 Given the fact that access to HCPs had been impacted, self-care practices may have picked up during the pandemic for some ailments; also, home confinement leading to healthy living may have impacted overall incidence of certain other ailments.
- 3 Since the study period i.e. early Feb-mid Mar 2021 and ailment occurrence period i.e. preceding three months from Nov'20-Jan21 coincided around the time when the first wave of COVID-19 had receded and treatment with expert advice was a challenge in the previous few months, consumers were keen to meet HCPs, even for minor ailments, to ensure symptoms were addressed in the right manner. On the other hand, some other respondents may have still avoided visiting HCPs unless it was serious/chronic. Considering this situation, we have factored self-medication window as four to five days (under normal circumstances, consumers would have self-medicated for approximately three days and visited the HCP thereafter).
- 4 Frequency of occurrence of ailments has been applied uniformly to HCP, self-medication and physiotherapist spends per occurrence to calculate respective annual spends.
- 5 For calculation of treatment spends, the following elements were considered:
 - HCP's consultation fees as well as that of allied healthcare professionals such as physiotherapist, nutritionist was considered
 - Medicine cost (Rx, self-medication, pharmacist advice)
 - Diagnostic fees
 - Communication and Transport costs
 - Productivity impact





ABOUT

OPPI

The Organisation of Pharmaceutical Producers of India (OPPI) established in 1965, represents the research-based pharmaceutical companies in India. OPPI remains committed to supporting the nation's healthcare objectives and collaborating with all stakeholders to find sustainable solutions. OPPI believes the need for innovation must be balanced with the necessity for more accessible medicines, within a robust IP environment.

For more information, please visit <https://www.indiaoppi.com/>

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ABOUT

HAVAS LIFE SORENTO

Havas Life Sorento (HLS) is the dedicated health and wellness arm of Havas Group India and is aligned with Havas Health & You (HHY), the world's largest healthcare communication network spanning over 60 countries. HHY works on the philosophy of Human Purpose with strong future-focus and deep-rooted innovation to inspire healthier lives. With diverse experience and expertise in pharma, consumer health, diagnostics, devices and hospital brands & business, HLS plays an instrumental role in various strategic initiatives for the industry's leading brands as well as new launches.

HLS is also recognized as a 'Thought Leader' in Consumer Healthcare in India and has facilitated many companies to develop their Rx to OTC switch strategies. It has also been the Knowledge Partner of OPPI's OTC Task Force Committee and has co-authored publications in the context of designing Policy Framework and Advertising Guidelines.

For more information, please visit <https://in.havas.com/>.

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CORE TEAM

Nitika Garg, Director Research, OPPI



With a decade and half of experience, Nitika leads the Research function at OPPI. As a Research Director, she is responsible for providing analytical support to advocacy campaigns of the OPPI. Her understanding of the regulatory and commercial ecosystem of the pharmaceutical industry assists in strengthening OPPI's position as knowledge partner to member companies on pharma policy. Prior to OPPI, Nitika has worked with leading pharmaceutical companies such as Bristol Myers Squibb (BMS), Glenmark and Biocon, spearheading Business Development and Marketing Strategy initiatives.

Sreedevi Yallamraju, Director Consulting Services, HLS



Sreedevi been associated with the healthcare sector for past 14 years; she has worked earlier in IQVIA (erstwhile ORG IMS) as an Information Solutions Specialist and Stemade, a start-up in dental stem cell banking. She has been associated with HLS for almost 10 years in various roles and leads consulting projects, strategy workshops as well as co-authors reports and thought leadership articles. She is closely involved in HLS' knowledge initiatives related to the consumer healthcare domain.

Vivishnavel Vajravel, Consultative Consumer Insights Partner



A seasoned marketing research professional with over two decades of experience in insights and consulting spread across industries blending in the traditional rigour of research and analytics meaningfully into new age domains of digital, social intelligence, neuro-marketing and behaviour science for impactful outcomes. Range of research works from Brand & Communication, Market Segmentation, Opportunity Sizing and Estimations, Stakeholder Management, Pricing and Shopper with richness of consumer behaviour understanding.