

Monday, 5 August 2019

Panadol's continuing dominance proves a pain for competitors

New research from Roy Morgan shows 12.4 million Australians aged 14+ (60.4%) are now purchasing headache and pain relief products in an average month up from 12.1 million in 2016.

The fact that well over half of Australians are buying pain relief tablets or capsules illustrates the size of this sector of the pharmaceutical industry.

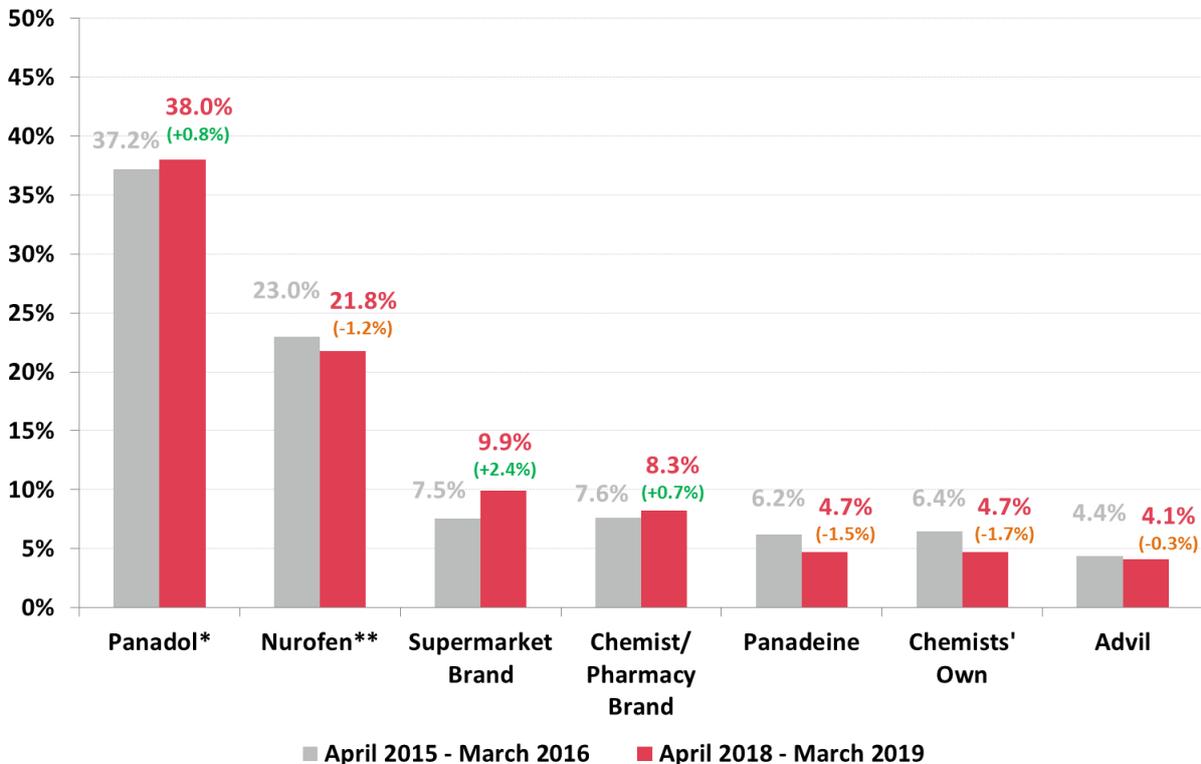
Panadol remains Australia's preferred headache and pain relief medication with 7.8 million Australians (38% of the population) purchasing the brand in an average four weeks including their flagship Panadol brand as well as Panadol Extra, Panadol Osteo, Panadol Rapid and Children's Panadol. Its continuing stronghold on the market doesn't appear to be ending anytime soon.

Nurofen is the second most purchased pain relief brand (21.8%), and the only brand providing any significant competition to Panadol's dominance. Nurofen's flagship brand is complemented by Nurofen Zavance and Nurofen for Children.

The new research demonstrates the relative stability of the headache and pain relief market. Over the past three years, the proportion of Australians who purchase Panadol increased by only 0.8% points to 38%. Over the same period, Nurofen has decreased by 1.2% points to 21.8%.

Other favoured products include Supermarket Brands (9.9%), Other Chemist/Pharmacy Brands (8.3%), Panadeine (4.7%), Chemist's Own (4.7%) and Advil (4.1%).

Headache/Pain relief brands purchased in an average four weeks



Source: Roy Morgan Single Source (Australia) April 2015 – March 2019. Average interview s per year n=14,785.

Base: Australians aged 14+. *Panadol includes Panadol, Panadol Rapid, Panadol Osteo, Panadol Extra and Children's Panadol. Nurofen includes Nurofen, Nurofen Zavance and Nurofen for Children.

FOR IMMEDIATE RELEASE

Chemists and pharmacies are the preferred channel for Australians to find pain relief

Chemists were the most popular choice of provider, with 30.1% of Australians indicating they buy pain relief from chemists or pharmacies in an average six months, with Chemist Warehouse (15.1%) being the number one option. Supermarkets were the next preferred choice on 26%, with Woolworths leading the way on 12.3%, followed closely by Coles on 12.0%.

What do we know about buyers of headache and pain relief products?

Women make up the largest proportion of pain relief purchasers (58%), compared with men (42%), and purchasers between 35-49 years old constitute 28% of buyers, which is the largest individual segment.

The quintessential buyer of headache and pain relief products is more likely than the average Australian to be in a mid-life household with children and in terms of the Roy Morgan Values Segment more likely than the average Australian to be classified as [Conventional Family Life](#) or [Visible Achievement](#) – ‘Despite being successful they retain traditional values about home, work and society. The family is very important to this Segment and they place great emphasis on providing their families with a high quality environment’.

She is likely to be employed (58%) with an average household income of \$105K and more likely than the average Australian to be ‘concerned about her cholesterol level’ and ‘spend more when my children coming shopping with me’. She is more likely to agree ‘her pet is a fussy eater’, ‘enjoy buying magazines’ and ‘like to be well insured’. She is more likely than the average Australian to have recently attended a rock or pop concert or gone to live theatre and more likely to have watched the swimming, diving or horse racing on TV and participated in dancing or Pilates.

Michele Levine, CEO of Roy Morgan, says:

“Panadol’s claim to be ‘Australia’s most trusted pain relief brand’ appears to be supported by the latest Roy Morgan data, which clearly shows Panadol as the product of choice for Australians looking to soothe a sore head.

“While there are numerous alternatives in the headache and pain relief market, such as Chemists’ Own, Panadeine, Herron and Advil, the data shows that Nurofen appears to be the only serious competitor of Panadol.

“The headache and pain relief sector is a large market with 12.4 million Australians (60.4%) purchasing a pain relief product in an average four weeks.

“Headache and pain relief products have become a staple of the Australian family’s shopping basket, and are used to combat everything from cold and flu symptoms, to easing a sore head after a big night out.

“Roy Morgan’s comprehensive consumer goods data gives companies and brands trying to gain an edge on their rivals unique insights into the spending preferences and habits of consumers.”

For comments or more information about Roy Morgan’s consumer data please contact:

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Related research findings

Find out more about Australians who purchase Headache and Pain Relief products.

About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 75 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2