

Brand Perception and Attitude of Doctors towards Omez

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at
IIHMR-Jaipur**

By

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**Under the Guidance of
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**Post Graduate Diploma in Pharmaceutical Management
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**Institute of Health Management Research,
Jaipur
2014**

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TO WHOMSOEVER MAY CONCERN

This is to certify that ASHUTOSH JOSHI student of Post Graduate Diploma in Pharmaceutical Management (PGDPM) from Institute of Health Management Research; Jaipur has undergone dissertation at MICROLABS from 15 FEBRUARY, 2014 to 30 APRIL, 2014.

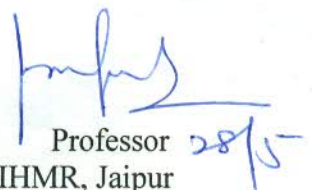
The Candidate has successfully carried out the study designated to him during dissertation and his approach to the study has been sincere, scientific and analytical.

The dissertation is in fulfillment of the course requirements.

I wish him all success in all his future endeavors.



Dean, Academics and Student Affairs
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CERTIFICATE BY SCHOLAR

This is to certify that the dissertation titled "**Brand Perception and Attitude of Doctors Towards Omez**" is submitted by Ashutosh Joshi, Enrollment No. IIHMR/PGDPM/2012-14/4-193 under the supervision of Dr.N.K Gurbani for award of Postgraduate Diploma in Pharmaceutical Management of the Institute carried out during the period from 15th February 2014 to 30th April 2014 embodies my original work and has not formed the basis for the award of any degree, diploma associate ship, fellowship, titles in this or any other Institute or other similar institution of higher learning.


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ABSTRACT

Gastro esophageal reflux disease (GERD) is a common health problem in the community. GERD is symptoms and or damage of food pipe due to reflux of acid from stomach into food pipe. Frequency of GERD in Asia including India might be increasing possibly due to modernization, change in life style and diet.

Proton pump inhibitors: Proton pump inhibitors (PPI) are very useful if administered 30 minutes before meals. These available in Indian market include omeprazole, pantoprazole, rabeprazole, lansoprazole and esomeprazole. Long-term intake of these drugs can permanently reduce ability of stomach to secrete acid.

Omeprazole was the first PPI to be marketed in India in 1991. Newer generation molecules Pantoprazole and Rabeprazole have started overtaking omeprazole. Pantoprazole was introduced in India in 1999 and it has been marketed aggressively by various companies since its introduction. Other PPIs such as Esomeprazole and Lansoprazole could not gain importance in the Indian Pharma Market which is clearly reflected in the market shares of It was first marketed in the US in 1989 by AstraZeneca.

- Omeprazole used in the treatment of
 - Dyspepsia,
 - Peptic Ulcer Disease (PUD), Gastro esophageal Reflux Disease (GORD/GERD) and Zollinger-Ellison Syndrome.
- Omez, (Omeprazole) is a proton pump inhibitor
- In India, it was launched by Dr. Reddy's in 1992 as **Omez**.

Hence, this study aims to understand the perception of the brand amongst doctors and to recommend strategies based on the understanding gained to further improve the perception and contribute more to the company's top line.

Acknowledgment:

I wish to pay my heartily thanks to Dr. N.K Gurbani for their support and guidance during the course of this study and preparation of the report.

I also pay thanks to Mr.Nitender Yadav(Product Manager, Micro labs), doctors, friends for helping me during my project.

At last I pay my gratitude to Almighty Sai baba and my parents for their blessings that lead to completion of this project.

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Preface

It is imperative that branding today in the Pharma industry has gained importance as the numbers of players are increasing manifold and the stakeholders thus have an ample number of choices.

Thus, as a brand manager one's onus to build a strong perception of the brand is of great significance.

Gastro esophageal reflux disease (GERD) is a common health problem in the community. GERD is symptoms and or damage of food pipe due to reflux of acid from stomach into food pipe. Frequency of GERD in Asia including India might be increasing possibly due to modernization, change in life style and diet.

Proton pump inhibitors: Proton pump inhibitors (PPI) are very useful if administered 30 minutes before meals. These available in Indian market include omeprazole, pantoprazole, rabeprazole, lansoprazole and esomeprazole. Long-term intake of these drugs can permanently reduce ability of stomach to secrete acid.

Omeprazole was the first PPI to be marketed in India in 1991. Newer generation molecules Pantoprazole and Rabeprazole have started overtaking omeprazole. Pantoprazole was introduced in India in 1999 and it has been marketed aggressively by various companies since its introduction. Other PPIs such as Esomeprazole and Lansoprazole could not gain importance in the Indian Pharma Market which is clearly reflected in the market shares of PPIs.

- Omez, (Omeprazole) is a proton pump inhibitor
- It was first marketed in the US in 1989 by AstraZeneca.
- In India, it was launched by Dr. Reddy's in 1992 as **Omez**.
- Omeprazole used in the treatment of
 - Dyspepsia,

- Peptic Ulcer Disease (PUD), Gastro esophageal Reflux Disease (GORD/GERD) and Zollinger-Ellison Syndrome.

Hence, this study aims to understand the perception of the brand amongst doctors and to recommend strategies based on the understanding gained to further improve the perception and contribute more to the company's top line.

Executive Summary

- **37%** of the doctors interviewed wrote 3-4 prescriptions of PPIs per day
- **95% of the GPs** prescribed PPIs for hyperacidity
- **42%** of the doctors prescribed **PPIs with NSAIDs**
- **Pantoprazole** was the most preferred PPI.
- The most prescribed brand of Pantoprazole is PAN from Alkem followed by PANTOCID of Sun
- 70% of the doctors do not perceive any difference between the pantoprazoles available in the market
- Out of the 38 doctors, who did perceive differences between the pantoprazoles, 15 said that they are different quality-wise
- **73%** of the doctors interviewed had **prescribed Omez** earlier
- Reputed brand was the most common reason(25 doctors) cited for prescribing **Omez**
- 14 doctors said that their reason for not prescribing **Omez** is that no Medical representative visits them
- **63%** of the doctors said that **Omez** is not regularly promoted to them
- Out of the 46 doctors who said **Omez** is regularly promoted to them, 25 doctors did not remember any promotional message
- **72%** of the doctors **could not remember the price** of any competitor
- The highest co-prescribed category for PPIs are NSAIDs & Antibiotics as 95% of the doctors mentioned they prescribe PPIs with these drug categories

- 23% of the doctors said that 8 out of their 10 prescriptions of PPIs are co-prescriptions.
- **16%** of the doctors said they would use **PANTOCID for personal use** while 14% of the doctors said that they rely on PAN.

Introduction

1.1 Background

Studies(www.ncbi.nlm.nih.gov/pubmed/9347176) have reported that 36% to 44% of adults experience heartburn at least once per month, 14% every week, and 7% once a day. Gastroesophageal reflux disease itself is common. One study reported that 20% of people had frequent symptoms of GERD but that very few of them sought help for the condition. People at all ages are susceptible to GERD.

Treatment of GERD

Antacids: Antacids neutralize the acid in the stomach and esophagus. The problem with antacids is that their action is brief. Antacids may be aluminum, magnesium, or calcium based. Aluminum-containing antacids have a tendency to cause constipation, while magnesium-containing antacids tend to cause diarrhea.

Histamine receptor antagonists: The first medication developed for more effective and convenient treatment of acid-related diseases, including GERD, was histamine (H₂) receptor antagonist (cimetidine, ranitidine, famotidine, and nizatidine). These suppress acid secretion most effectively during fasting and during sleep.

Proton pump inhibitors: Proton pump inhibitors (PPI) are very useful if administered 30 minutes before meals. These available in Indian market include omeprazole, pantoprazole, rabeprazole, lansoprazole and esomeprazole. Long-term intake of these drugs can permanently reduce ability of stomach to secrete acid.

Prokinetics: These drugs include domperidone, metoclopramide, itopride and mosapride. Cisapride is not used now-a-days due to its risk of toxic effects on heart. In severe GERD one may have to take these drugs life-long under medical supervision or may have to consider for surgical treatment.

This report is a compilation of the work carried out on a brand (**Omez**) of DRL.

1.2 Objectives of the Study

- To find out the brand perception and attitude of Doctors towards OMEZ
- To recommend a strategy to increase the share of OMEZ in anti-ulcerant market

1.3 Scope of the Study

This study takes into account the various facets of PPIs that are considered when a doctor decides to prescribe a PPI. The matter focuses on OMEZ in particular and the study is limited to doctors surveyed in Gurgaon

1.4 Research Methodology

a) Data Collection

Tool: Semi-Structured Questionnaire

Technique: Face to Face interview

b) Target Population: Doctors

c) Research Design: Descriptive

d) Sampling Technique: Purposive

e) Area covered: Gurgaon

f) Sample Size: 200

Introduction:

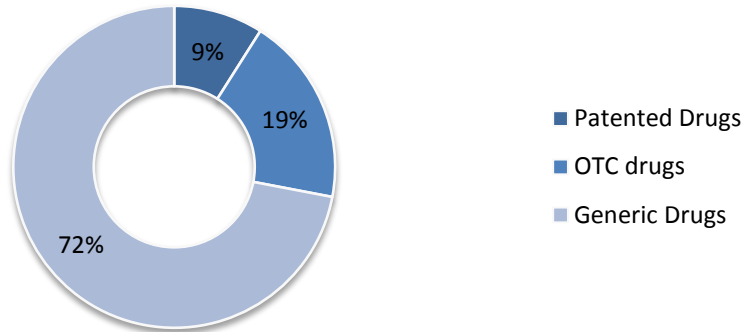
A) Indian Pharmaceutical Market – An Overview

- ❖ **Leading Pharma producer**: The country's Pharma industry accounts for about 1.4 per cent of the global Pharma industry in value terms and 10 per cent in volume terms
- ❖ **Among fastest growing industries**: The Indian pharmaceutical industry is expected to expand at a CAGR of 12.1 per cent during 2012–20 and reach USD45 billion
- ❖ **Rapidly growing healthcare sector**: The healthcare sector in India is expected to reach USD250 billion by 2020 from USD65 billion in 2012
- ❖ **Growing generics market**: The generics market is expected to grow to USD26.1 billion by 2016 from current USD11.3 billion in 2011; India's generics market has immense potential for growth
- ❖ **Ranked 5th in terms of attracting FDI**: Attracted 6 per cent of the total FDIs into India from April 2000 to August 2013 .Cumulative FDI inflows worth USD11.4 billion from April 2000 to August 2013 .

Generic drugs from the largest segment of Indian Pharma market

- ❖ With 72 per cent of market share (in terms of revenues), generic drugs form the largest segment of the Indian pharmaceutical sector. In 2011, sales of generic drugs stood at USD11.3 billion

%Revenue share of IPM sub - segments in 2011

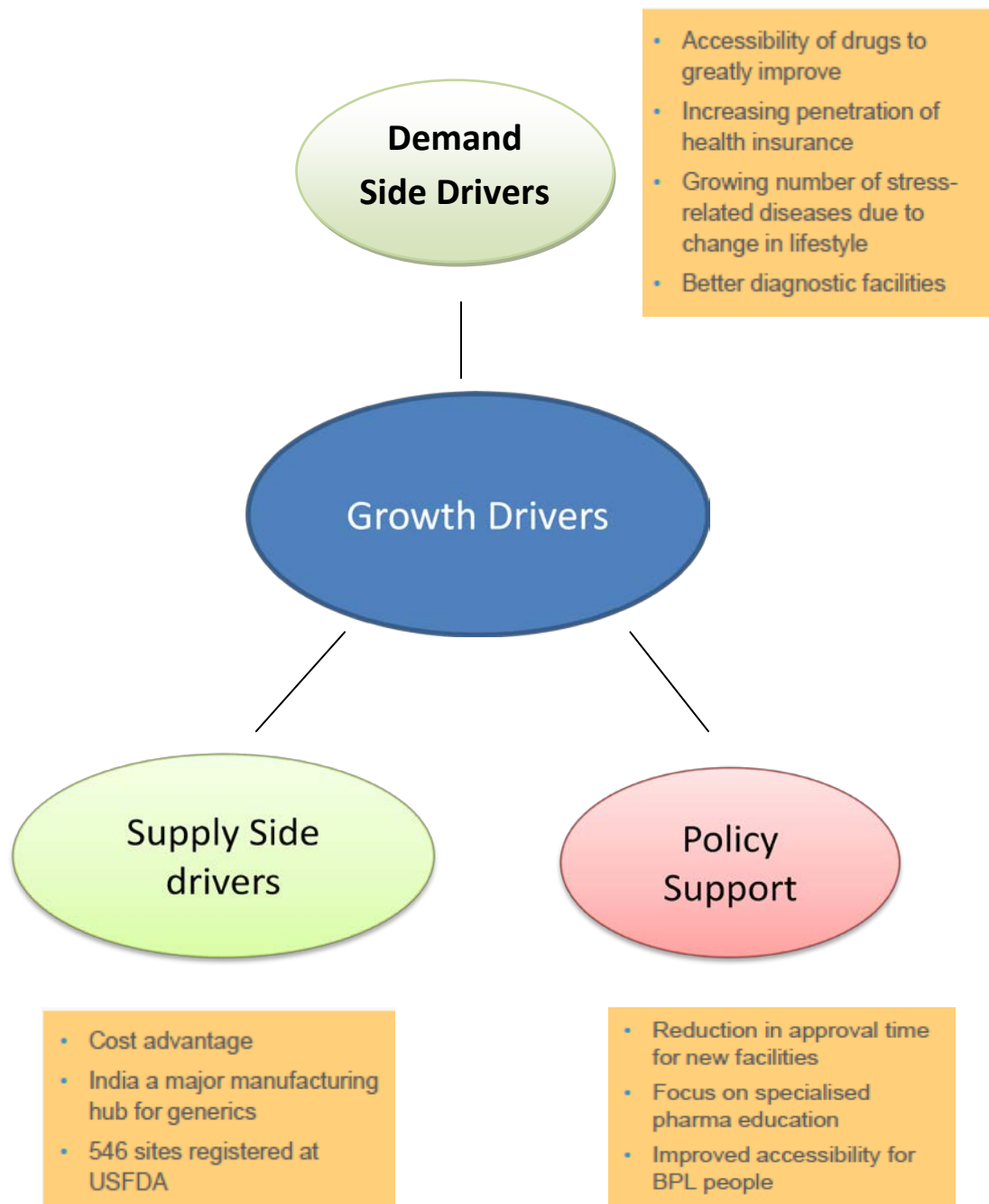


- ❖ Over the Counter (OTC) medicines and patented drugs constitute 19 and 9 per cent, respectively, of total market revenues.

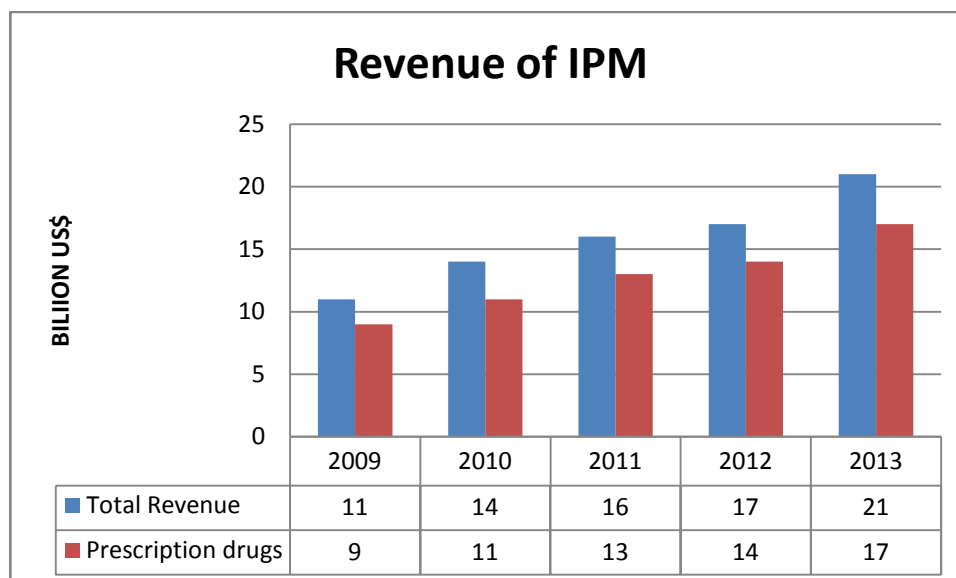
Salient Factors Contributed to the Growth

- ✓ **Macroeconomic Environment:**
Strong GDP growth, Rapid urbanization, Govt. Initiatives, changing demographics and development of biologics
- ✓ **Healthy Environment:**
Increase private and Govt. Spending and increase access to lower class towns
- ✓ **Robust Market Trend:**
We observe that IPM is on a high growth trend for the past year after a relatively low profile in 2008-2009

B) Market Dynamics IPM Growth Drivers



- ❖ The Indian pharmaceuticals industry revenues are expected to rise at a CAGR of 17.8 per cent to USD36 billion during 2008–16

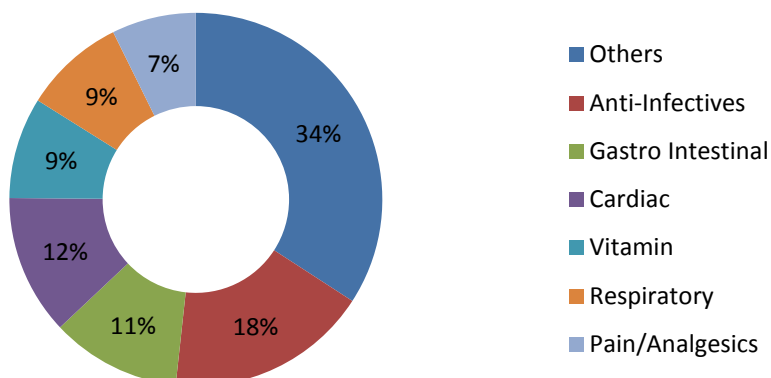


- ❖ During the same period, the revenues from prescription drugs are expected to expand at a CAGR of 18.2 per cent to USD29 billion

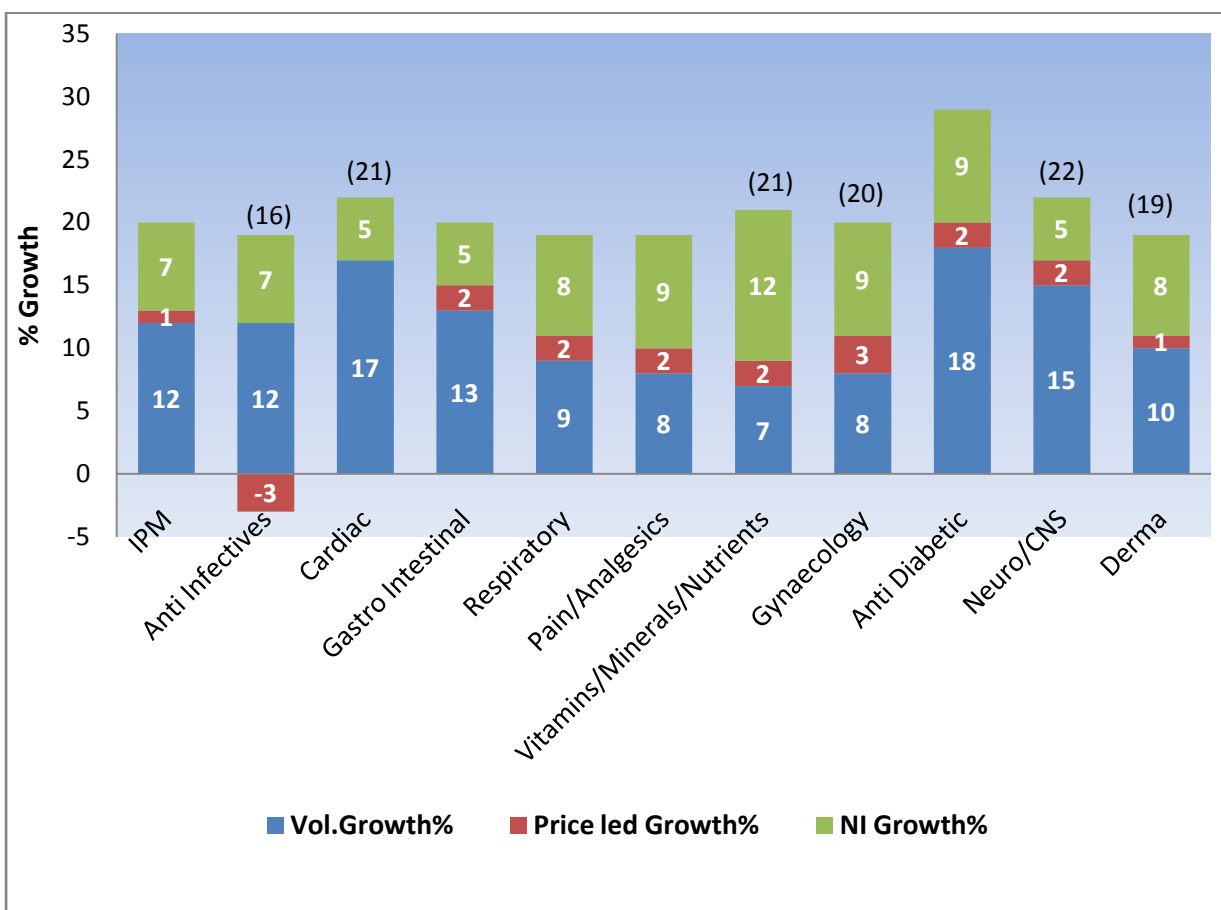
C) Therapy Performance:

- ❖ Anti Diabetic segment is the fastest growing and most promising segment and most important growth driver for IPM.
- ❖ Anti-infective drugs command the largest share (17.8 per cent) in the Indian Pharma market
- ❖ The cardiovascular segment represents 11.4 per cent of the market share; its contribution is likely to rise due to the growing number of cardiac cases in India

IPM market Segments



❖ Top five segments contributed nearly 58 per cent of the total drugs consumption



➤ Anti Diabetic and Cardiac segments have shown tremendous volume growth which reflects the potential of chronic therapy in today's market.

- Anti Infective segment has shown negative price led growth due to price reduction which is indicative of high competition in this segment.
- IPM is driven by volume and NI growth rather than price led growth which is indicative of a healthy industry and good future prospects.

Gastro Intestinal Therapy :Insights

- Good acceptance of PPI-Ocid, Omez and Pan
- Leader Abbott- 91% brands > above Rs.10 cr
- Top 3 companies managed to maintain their positions since last year
- Alkem progressive

Proton Pump inhibitor Market

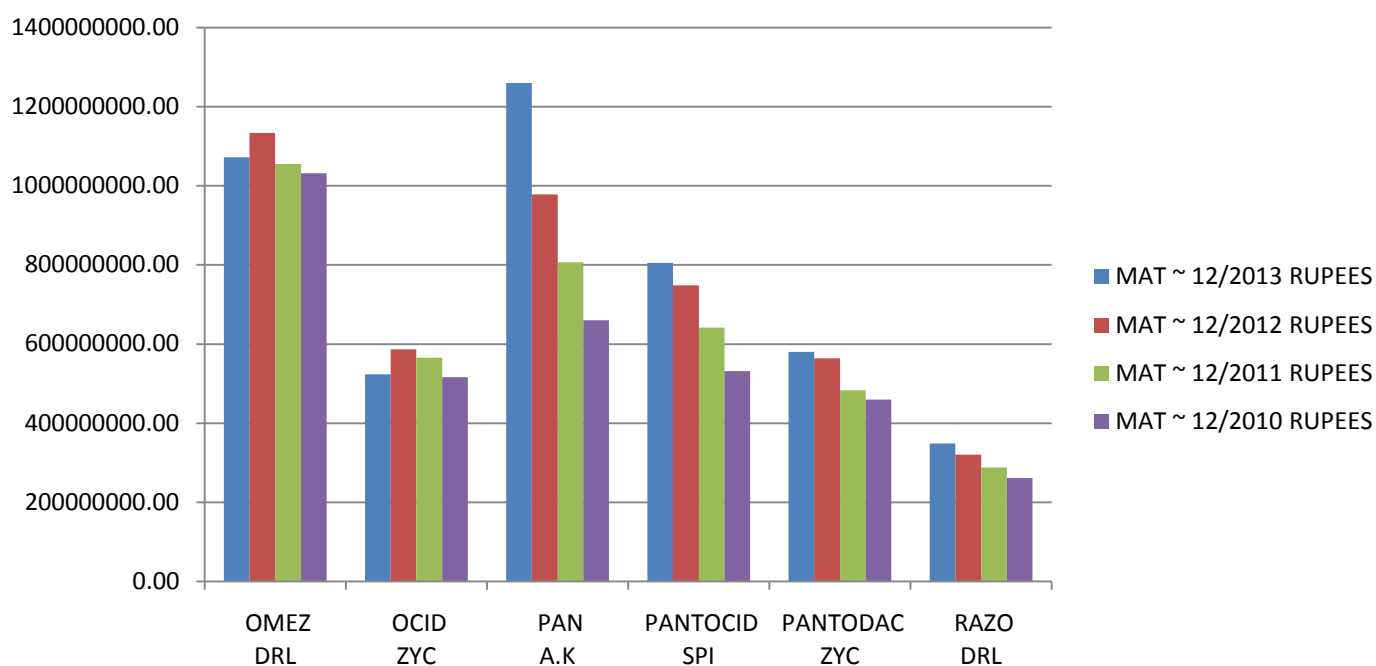
Sr. No.	Molecule description	Sales Rs. Crores
	PROTON PUMP IBHIBITOR MARKET	1249
1	Pantoprazole	410
2	Rabeprazole	395
3	Omeprazole	323.3
4	Esomeprazole	96.4
5	Lansoprazole	24.3

***ORG IMS MAT DEC'13 data**

Top 6 Brands of PPI category

PRODUCT DESC		MAT ~ 12/2013	MAT ~ 12/2012	MAT ~ 12/2011	MAT ~ 12/2010
		RUPEES	RUPEES	RUPEES	RUPEES
OMEZ	DRL	1072099531.00	1,13,33,72,591	1,05,53,06,381	1,03,17,43,888
OCID	ZYC	523846351.00	58,66,32,257	56,52,89,556	51,65,61,847
PAN	A.K	1260186021.00	97,80,39,810	80,66,95,578	65,99,46,969
PANTOCID	SPI	805272041.00	74,88,91,100	64,15,56,173	53,16,21,695
PANTODAC	ZYC	580466069.00	56,38,70,803	48,27,42,036	45,98,09,692
RAZO	DRL	349155056.00	32,05,07,410	28,83,86,178	26,14,13,245

***ORG IMS MAT DEC'13 data**



Top Brands under each molecule

Molecule Description	Rank	BRANDS	COMPANY	Sales Rs. Crores 2013
PANTOPRAZOLE	1	Pan	Alkem	126.01
	2	Pantocid	Sun pharma	80.52

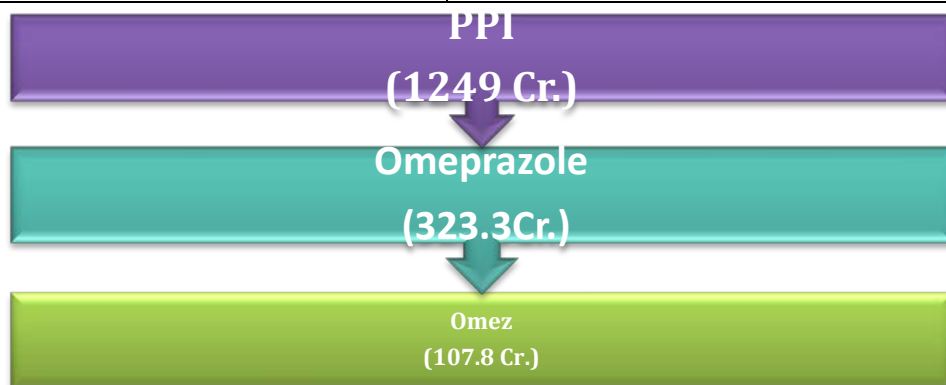
	3	Pantodac	Zydus	58.04
RABEPRAZOLE	1	Rablet	Lupin	33.1
	2	Razo	Dr. reddys	34
	3	Rabiplus	Wanbury	26
OMEPRAZOLE	1	Omez	Dr. reddys	107.8
	2	Ocid	Zydus Cadila	52.38
	3	Omee	Alkem	8.91
	4	Oskar	Mankind	3.0
	5	Omesec	Ranbaxy	3.09
ESOMEPRAZOLE	1	Nexpro	Torrent	23
	2	Raciper	Ranbaxy	12.3
LANSOPRAZOLE	1	Lanzol	Cipla	2.2

***ORG IMS MAT DEC'13 data**

2 Omez Facts

Brand Facts	Details
Composition	Omeprazole & Combinations with Domperidone
SKUs	10mg,20mg and 40mg
Company	Dr.Reddy's Laboratory
Market capitalization	44573.9Cr
Company Ranking	2
Year of Launch	1992
Value of Omeprazole Market	270 crores growing at 18.93%
Sales (Rs.)	107 Cr.
Market Share in Omeprazole Market & % Growth	33.34
Growth (last 12 months)	-5.4%
Profit of the company	4740.2Cr

Indications	• GERD • Peptic Ulcer • H. Pylori Infection • NSAID Induced Ulcers • Zollinger Ellison Syndrome
Mode of Action	Inhibits H ⁺ /K ⁺ ATPase pump function thereby reducing gastric acid secretion. It also has a role in the eradication of H. pylori.
Side Effects	Diarrhoea, dizziness, pruritus, skin rashes, GI tract infections, chest pain, headache, nausea, pain, anxiety, hyperglycemia; malaise or lassitude; myalgia; edema; insomnia; hyperlipidaemia; flatulence, abdominal pain, constipation,



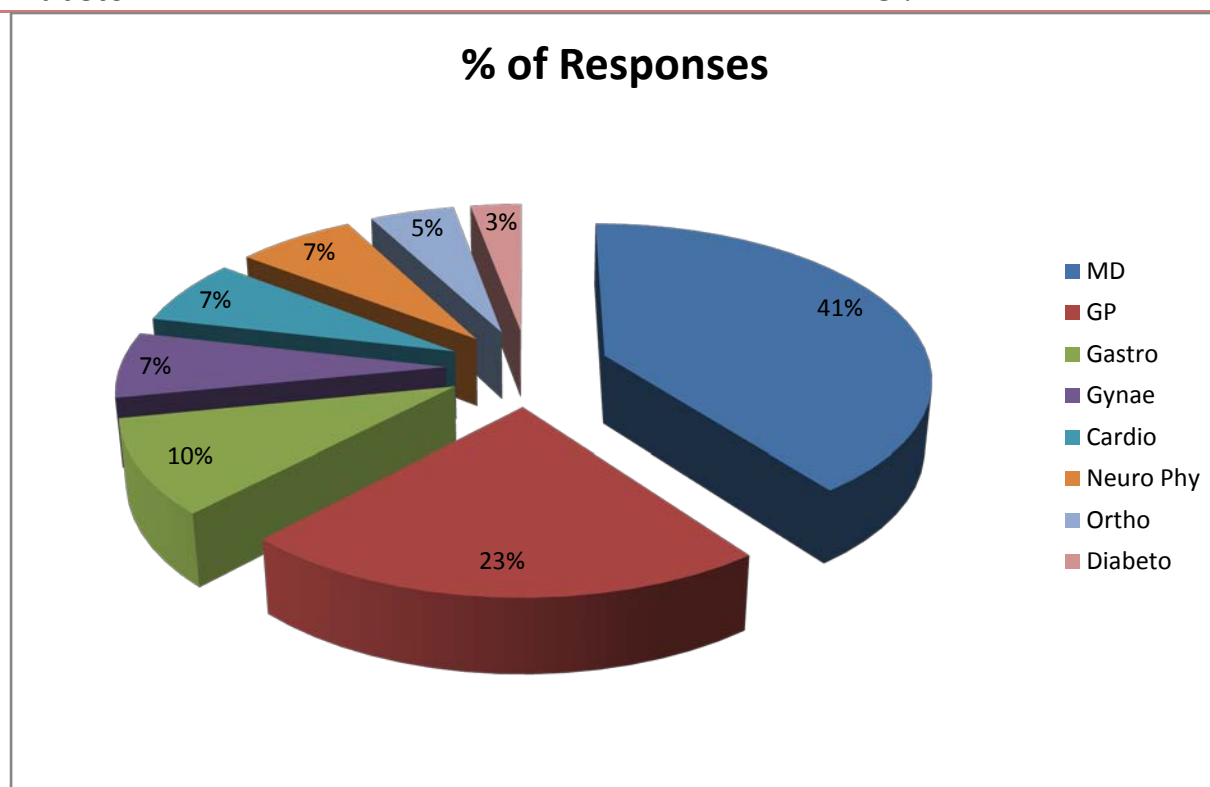
Data Analysis

Specialty Wise Distribution:

Specialty	% of Responses
MD	41 %
GP	23 %
Gastro	10 %
Gyne	7 %
Cardio	7 %
Neuro Phy	7 %
Ortho	5 %

Diabeto

3 %



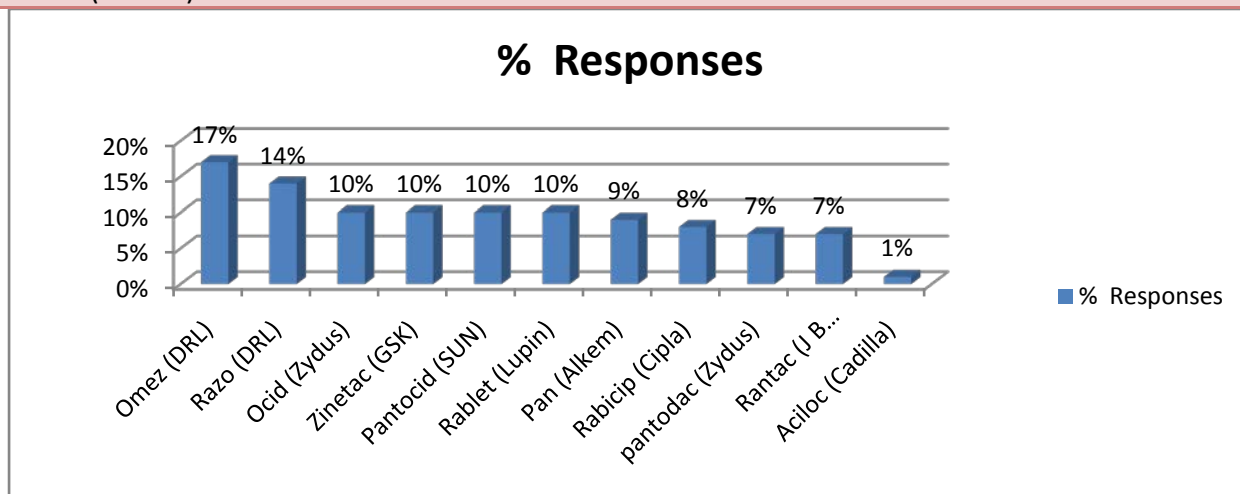
GENDER WISE DISTRIBUTION:

GENDER	% of Responses
F	16 %
M	84 %

Q-1) Doctor which brand comes to your mind first, when you think of GERD or peptic ulcers? (N=200, Multiple Responses=344)

Brands	% Responses
Omez (DRL)	17%
Razo (DRL)	14%
Ocid (Zydus)	10%
Zinetac (GSK)	10%

Pantocid (SUN)	10%
Rablet (Lupin)	10%
Pan (Alkem)	9%
Rabicip (Cipla)	8%
pantodac (Zydus)	7%
Rantac (J B Chemicals)	7%
Aciloc (Cadilla)	1%



Consultant

Brands	No. of responses	% Of Responses
Omez (DRL)	29	19%
Razo (DRL)	22	14%
Ocid (Zydus)	16	10%
Rablet (Lupin)	16	10%
Zinetac (GSK)	16	10%
Pan (Alkem)	13	8%
Pantocid (SUN)	12	8%
Rabicip (Cipla)	12	8%
Pantodac (Zydus)	9	6%
Rantac (J B Chemicals)	8	5%
Aciloc (Cadila)	1	1%
Total	154	100%

GP

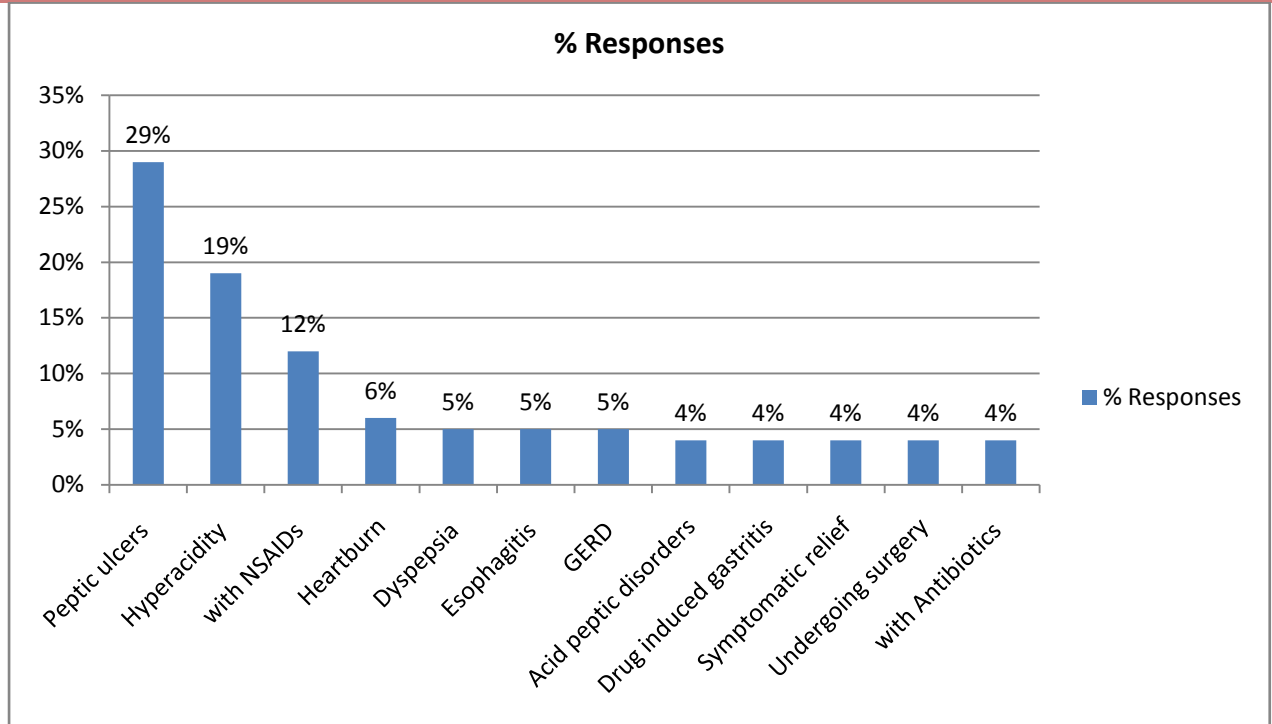
Brands	No. of responses	% Of Responses
Pantocid (SUN)	7	15%
Razo (DRL)	6	13%
Rantac (J B Chemicals)	5	11%
Pan (Alkem)	5	11%
Ocid (Zydus)	4	9%
Pantodac (Zydus)	4	9%
Rabicip (Cipla)	4	9%
Zinetac (GSK)	4	9%
Omez (DRL)	4	9%
Rablet (LUPIN)	3	7%
Total	46	100%

Q-2) What are the indications for which you prescribe Omez?

N=200 Multiple Responses=329

Indications	% Responses
Peptic ulcers	29 %
Hyperacidity	19 %
with NSAIDs	12 %
Heartburn	6 %
Dyspepsia	5 %
Esophagitis	5 %
GERD	5 %

Acid peptic disorders	4 %
Drug induced gastritis	4 %
Symptomatic relief	4 %
Undergoing surgery	4 %
with Antibiotics	4 %



CONSULTANT Response

Indications	% of Responses
GERD	20%
Peptic ulcers	12%
Heartburn	10%
Drug induced gastritis	8%
Dyspepsia	8%
Esophagitis	8%
Acid peptic disorders	8%
Hyperacidity	7%
Symptomatic relief	7%
Undergoing surgery	6%
with Antibiotics	2%
with NSAIDs	2%

Gastro Response

Indications	% of responses
GERD	30%
Peptic ulcers	25%
Dyspepsia	15%
Hyperacidity	10%
Esophagitis	10%
with Antibiotics	5%
with NSAIDs	5%

GP Response

Indications	% of Responses
Hyperacidity	26%
Peptic ulcers	20%
GERD	11%
Heartburn	11%
Dyspepsia	7%
Esophagitis	7%
Undergoing surgery	7%
Symptomatic relief	4%
Acid peptic disorders	2%
Drug induced gastritis	2%

with Antibiotics	2%
with NSAIDs	2%

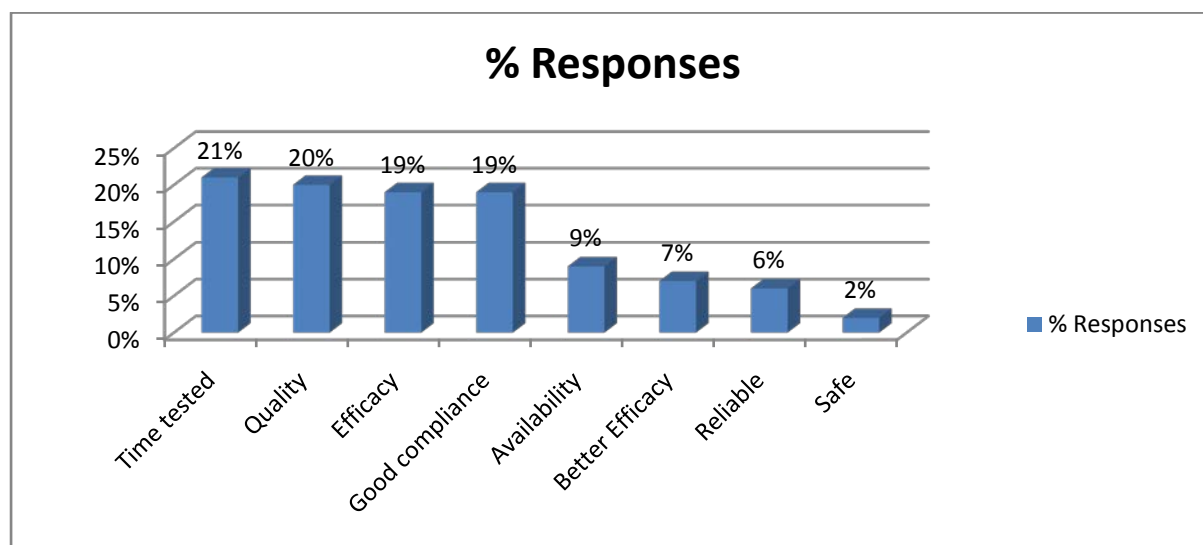
Q -3) Doctor ,what word comes to your mind when you hear the name Omez?

N=200

Indications	% Responses
Time tested	21 %
Quality	20 %
Efficacy	19 %
Good compliance	19 %
Availability	9 %
Better Efficacy	7 %
Reliable	6 %

Safe

2 %



Q -4)Doctor do you prescribe omez mainly for a single prescription or co-prescribe it with other medicines ?(N=200)

Indication	Number of responses		
	Cons (n=154)	GPs (n=46)	Total N=200
Co-Prescription	85	25	110
Prescription	35	12	47
Both	34	9	43

Total	154	46	200
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Q-5) Can you recollect the price of Omez? (N=200)

Response	Number Of Responses		
No	103	35	138
Yes	51	11	62
Total	154	46	200

Q -6) Doctor, can you recall the promotion for Omez? (N=200)

Response	Number of Responses		
	Cons(n=154)	GP (n=46)	Total N=100
No	98	33	131
Yes	56	13	69
Total	154	46	200

Comments

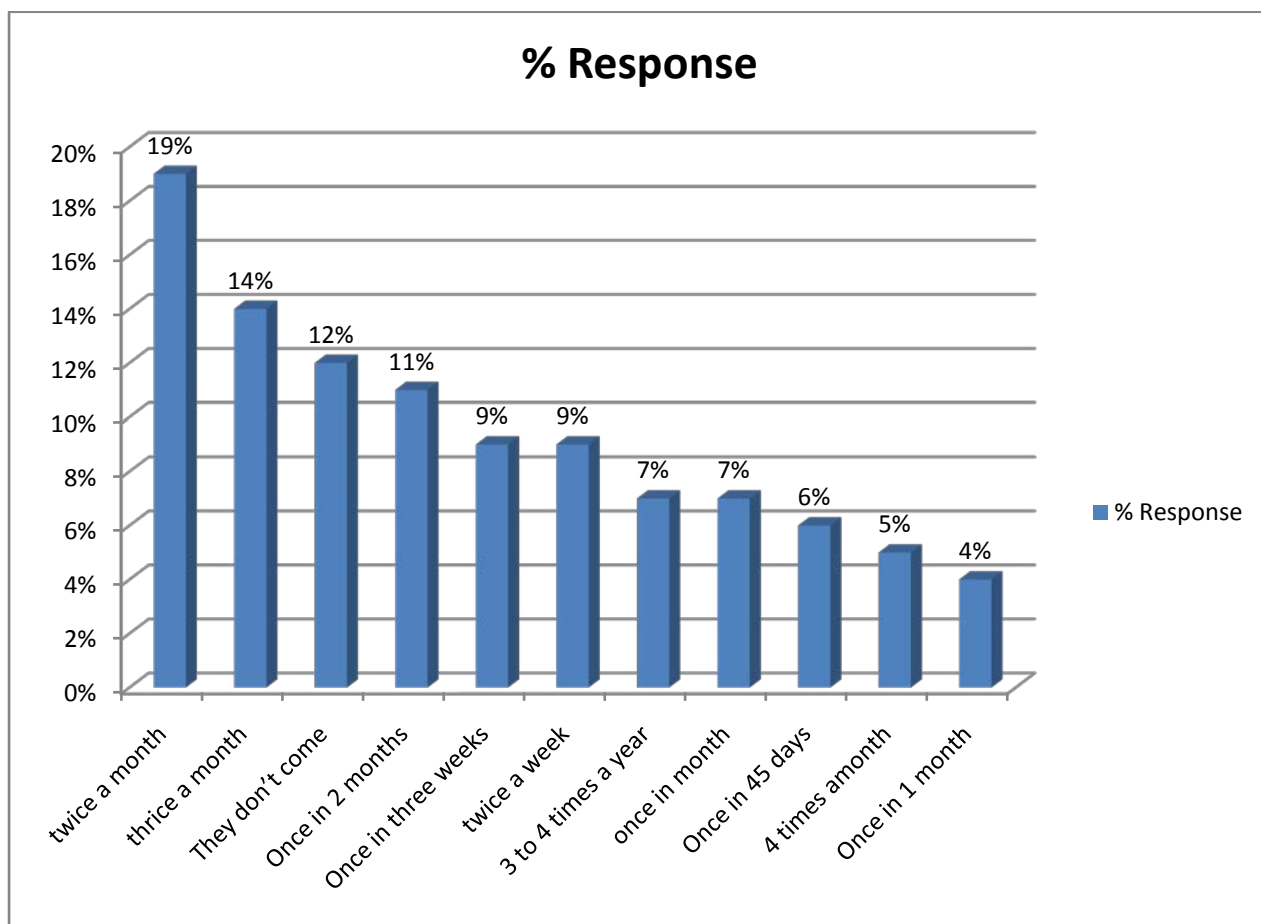
Responses	Number of Responses		
	Cons	GP	Total
Regular Reminders	12	3	15

Haven't met for a long time	8	3	11
Promote it very heavily	6	-	6
Regularly visit	4	2	6
I don't prescribe	4	-	4
It easily comes to the mind	4	-	4
Nothing different	3	2	5
They hardly promote because doctor know the brand	3	-	3
They just give reminders	3	-	3
Irregular visits by MR	3	1	4
Know the brands over the years	2	-	2
Heavy Sampling	2	1	3
Camps and Conference	1		1
Gifts/Books	1	1	2
Total	56	13	69

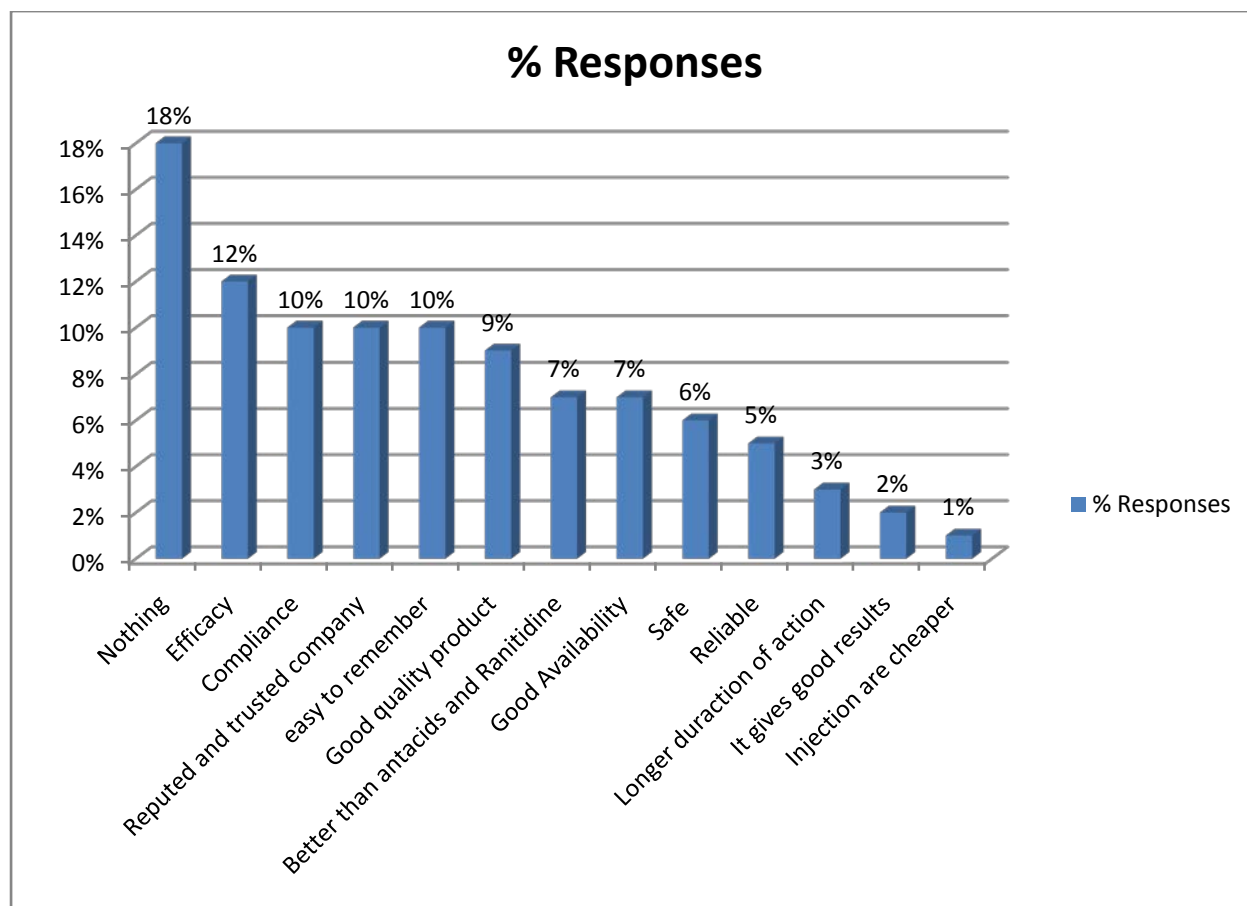
Q-7) How many times in a month does the DRL Medical Representative visit you for promoting omez? (N=200)

Visit Frequency	% Response
twice a month	19 %
thrice a month	14 %
They don't come	12 %
Once in 2 months	11 %
Once in three weeks	9 %
twice a week	9 %
3 to 4 times a year	7 %
once in month	7 %
Once in 45 days	6 %

4 times a month	5 %
Once in 1 month	4 %



Q-8) Doctor, What is it that you like most about Omez? (N=200)

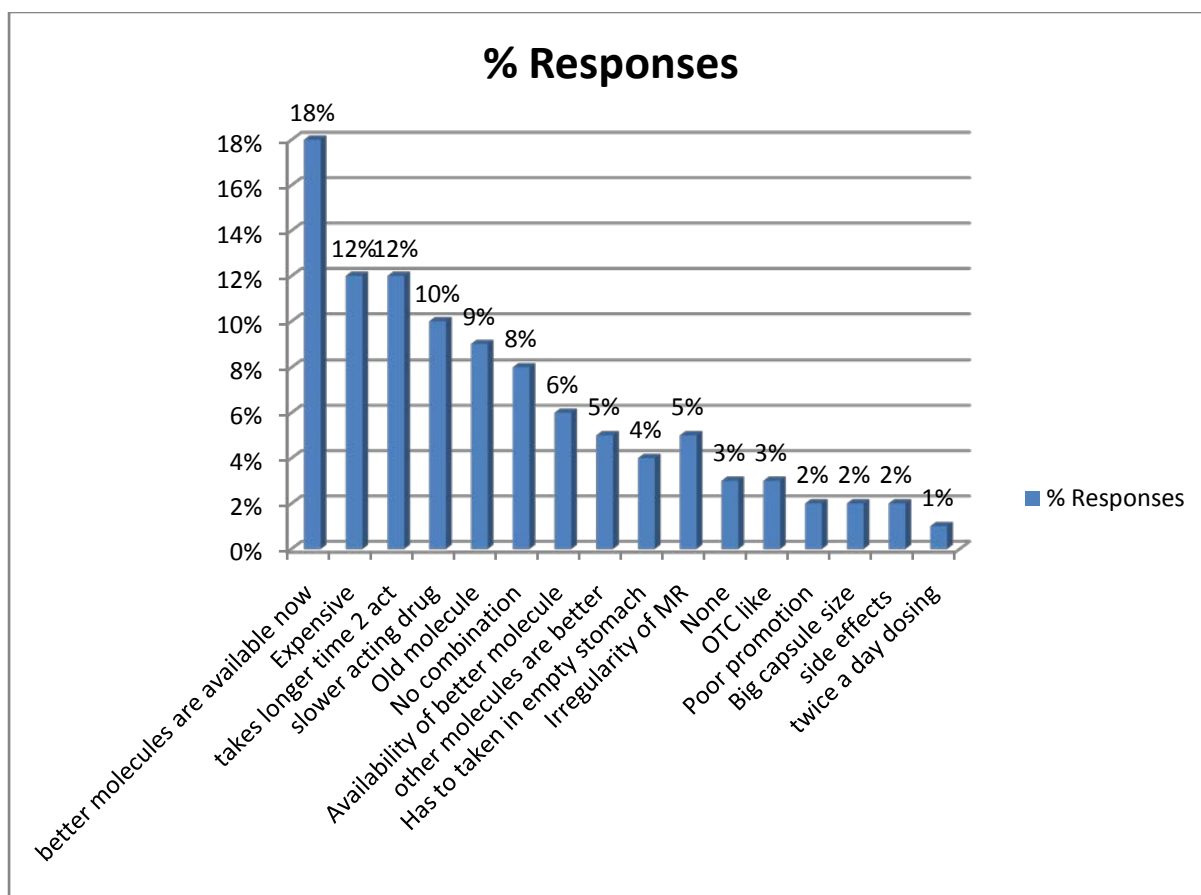


Consultant	No. Of responses	% of Responses
Nothing	31	20
Efficacy	16	10
Good quality product	16	10
Good Compliance	15	10
Reputed and trusted company	14	9
easy to remember	13	8
Better than antacids and Ranitidine	12	8
Available for a long time	10	6
Injection are cheaper	9	6
It gives good results	9	6
Longer duration of action	5	3
Reliable	2	1
Safe	2	1
Total	154	100

GP	No. Of responses	% of Responses
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Efficacy	7	15
Reputed and trusted company	6	13
Better than antacids and Ranitidine	5	11
Compliance	5	11
Nothing	5	11
Available for a long time	4	9
easy to remember	4	9
Good quality product	2	4
Injection are cheaper	2	4
It gives good results	2	4
Longer duration of action	1	2
Quality	1	2
Reliable	1	2
Safe	1	2
Total	46	100

Q -9) What is it that you dislike most about Omez? (N=200)



Consultant	No. Of responses	% of Responses
better molecules are available now	37	24
Slow onset of action	36	23
No combination	14	9
Old molecule	14	9
Has to taken in empty stomach	13	8
twice a day dosing	13	8
Big capsule size	4	3
Expensive	4	3
Irregularity of MR	4	3
None	4	3
OTC like	4	3
Poor promotion	4	3
side effects	3	2
Total	154	100

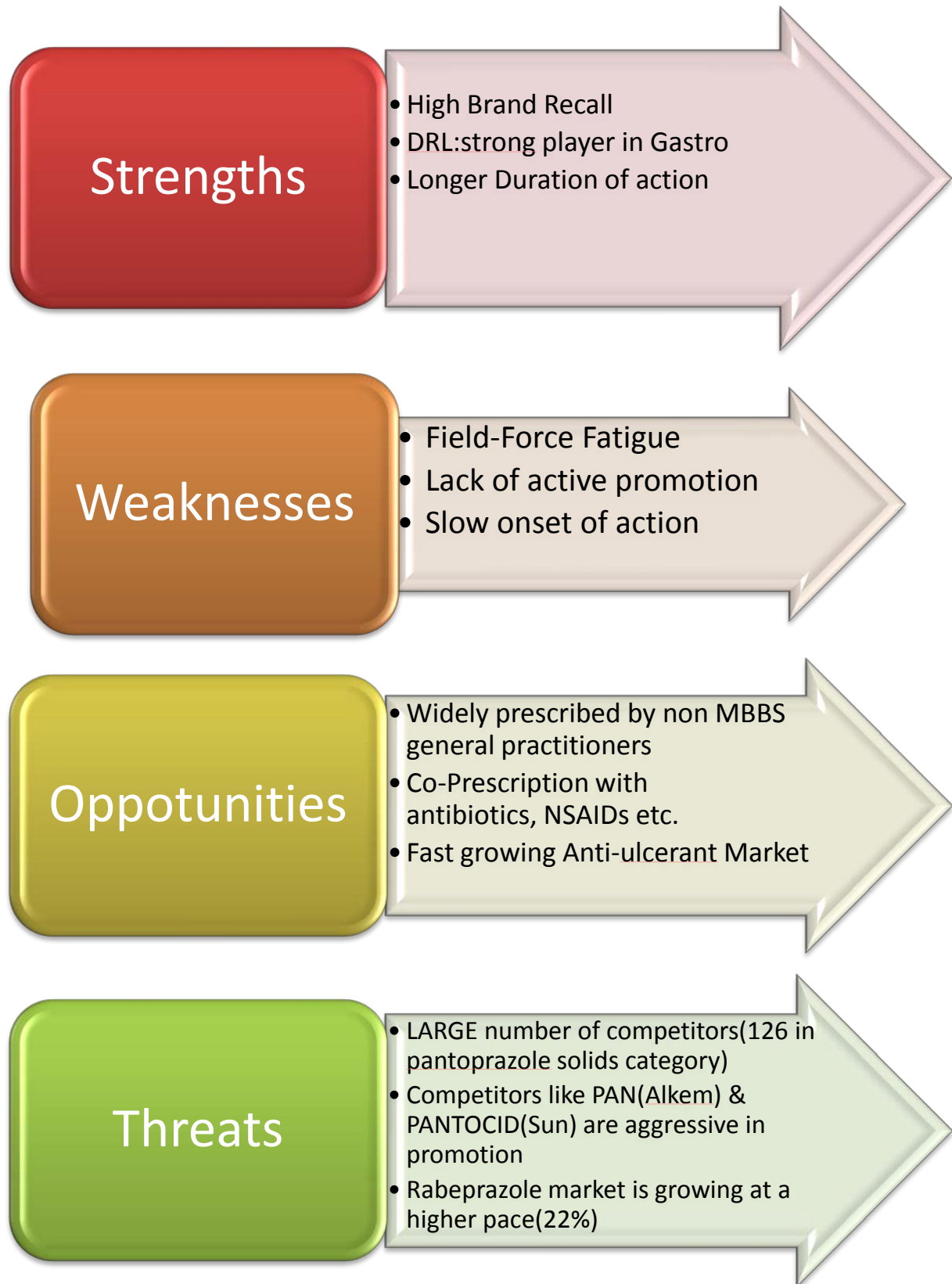
GP	No. Of responses	% of Responses
Better molecules are available now	12	26
OTC like	8	17
Irregularity of MR	5	11
Expensive	4	9
Old molecule	3	7
Slow onset of action	9	20
Poor promotion	3	7
None	2	4
Total	46	100

Q-10) Doctor do you have any suggestions for improvement of the Brand? (N=200)

Consultant	No. Of Responses	% of Responses
Early onset of action needed	21	14%
need to be more competitive and aggressive	19	12%
Should be more Cost-effective	19	12%
Provide more range of dosage forms	17	11%
reduce the pack size	17	11%
Don't make it a OTC like drug	16	10%
increase sampling	16	10%
I am satisfied and have no complaints	11	7%
Increase promotional activities	11	7%
reduce the size of the capsule	6	4%
Increase the frequency of visits	1	1%
Total	154	100%

GP	No. Of Responses	% of Responses
need to be more competitive and aggressive	6	13%
Should be more Cost-effective	6	13%
I am satisfied and have no complaints	5	11%
Increase promotional activities	5	11%
increase sampling	5	11%
Don't make it a OTC like drug	4	9%
Early onset of action needed	4	9%
Provide more range of dosage forms	4	9%
reduce the size of the capsule	4	9%
reduce the pack size	3	7%
Total	46	100%

8. SWOT analysis for Omez



Findings

- Attitude and Perception of Consultants was different from the GPs
- Emotional attachment of doctors(consultant) persist with OMEZ while GP prescriptions were found to be price driven
- This is the reason that inspite of new molecules like rabeprazole,lansoprazole,esomeprazole OMEZ is growing
- Market Share of OMEZ is 107 Cr which captures the 33% share of total Omeprazole market.
- The top of the mind response of consultant is OMEZ
- The top of the mind response of GP was Pantocid.
- Majority of consultants and GPs prescribed OMEZ with NSAIDs and antibiotics which leaves the scope for development of better combination to increase the market share
- The DRL team does not promote OMEZ regularly .This is the main reason that majority of Doctors were not able to recall the brand promotion

Recommendations

- **Brand recall:** In order to strengthen the emotional attachment with existing customers and new customers company should focus on brand recalling which will help the company to bring the brand on top of mind of customers
- **Brand extension:**To increase the market cap company should focus on new combinations such as Omeprazole+Ordansetron and marketize it heavily
- **CME & Seminars:** Companies are smartly creating the superiority of Newer generations PPIs like rabeprazole,lansoprazole,pantprazole over omeprazole in terms of side effects and time to relief the symptoms but the thing is Omeprazole have same efficacy and fewer side effects like new generations PPIs

By organizing seminar & CME's company should educate doctors regarding Omeprazole efficacy and safety and fail the marketing Gimmick of competitors.

