

GSK Consumer Healthcare

Global Pain Index Report
4th edition – 2020

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What is the Global Pain Index (GPI) study?



A global, cross-sectional, representative assessment of the state of pain in the world



The Global Pain Index Study is a **social study**

an online survey, capturing the perceived immediate impact of pain on individuals' everyday lives, their health, their feelings, emotions, motivations and behaviors from their experience at a global and country levels.



The Global Pain Index is a **cross-sectional study** which has been conducted consistently for the **past six years**, following a **robust and rigorous methodology** with a **nationally representative online sample**.

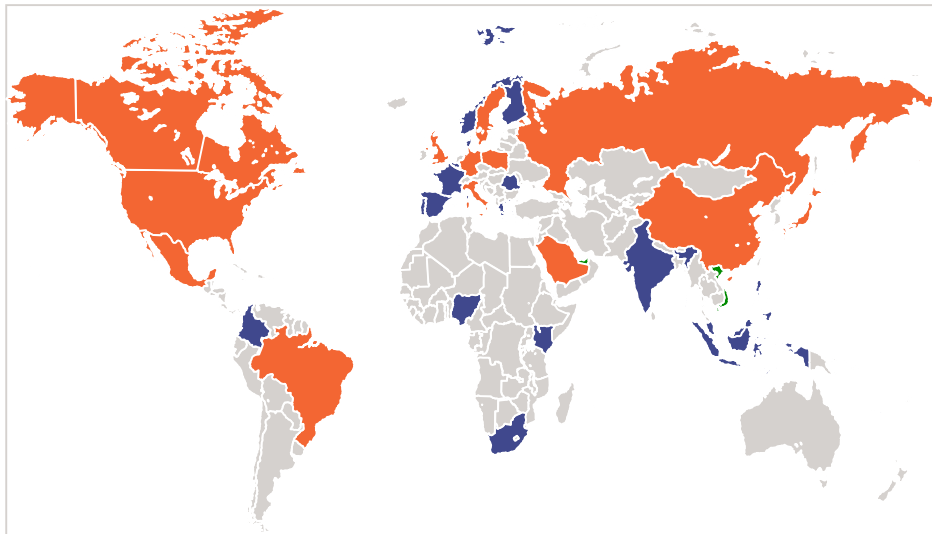


The **Index** which is derived from the study is a **global measure** of the state of pain; how sufferers experience it, how it impacts their everyday lives and how it impacts how they feel.



The study **raises awareness about pain** and shape the debate around its impact on society at large and individuals' lives. It is a resource appreciated by Healthcare professionals.

This year, we talked to 19,000 individuals around the world



Australia,
China,
Germany,
Italy,
USA,
Sweden,
KSA,
Colombia,
India,
Malaysia,
Brazil,
Canada,
Japan,
Poland,
Russia,
UK,
Mexico,
France,
Spain.

For each edition, we conducted an online interviews amongst **1,000 individuals** in each country, to collect meaningful data from the general population.

The sample is **representative** of the **online population** aged 18+ in each country based on age, gender and region.

The state of pain GPI 4 highlights



Did you know there's
something
that unites people
all over the world?

**Pain remains
a global issue**

**which cannot
be ignored**

93%

have suffered pain in the last year
globally

+ 2 pts since 2018 *(GPI 3 – Global 19)*

One third

of the
world's population
are in pain

every day

(34%)



This is **not** just the
elderly population.

1 in 5

chronic sufferers

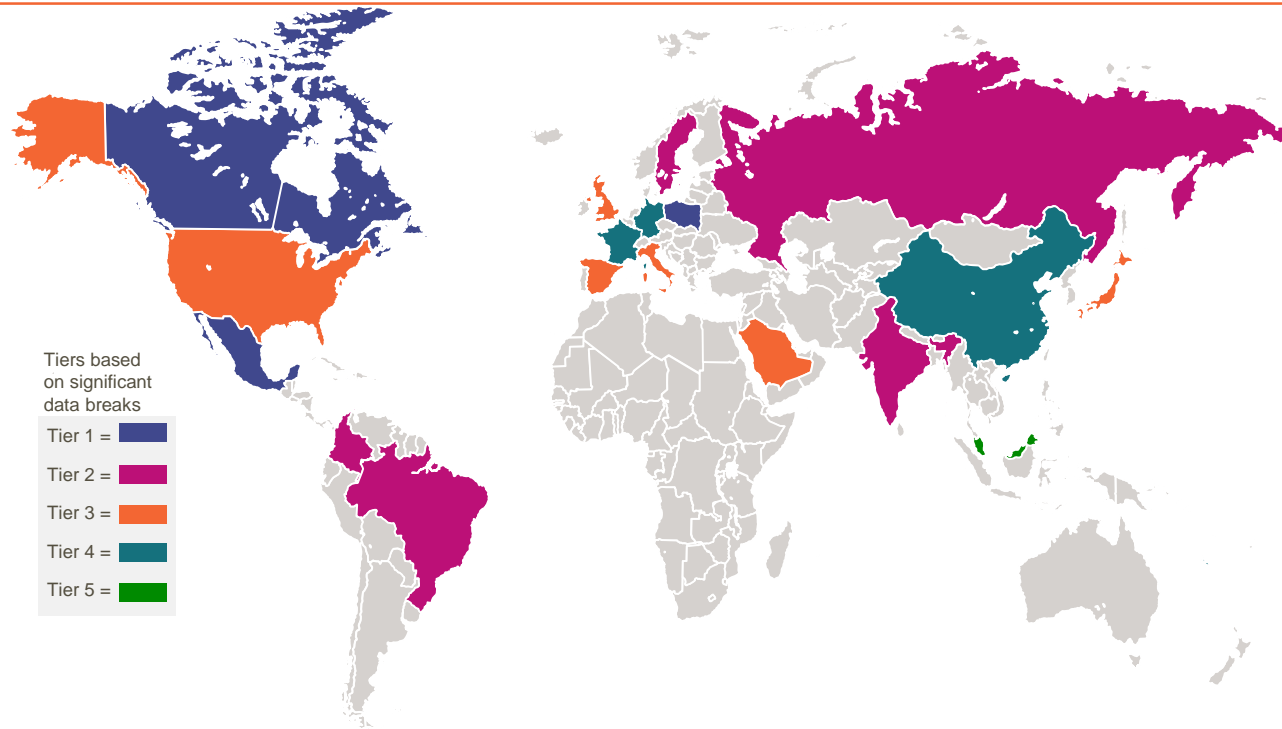
are

under

30 years old.

A shared reality experienced by all

Wherever they live in the world



Poland	99%
Mexico	98%
Canada	98%
Brazil	97%
Russia	97%
Colombia	97%
India	96%
Italy	96%
Australia	96%
Sweden	96%
USA	94%
Japan	94%
UK	94%
KSA	94%
Spain	93%
France	92%
Germany	91%
China	90%
Malaysia	86%

Pain Prevalence GPI 4



More than

2 billion

individuals

across the
19 countries studied

Poland	99%	26 Millions
Mexico	98%	60 Millions
Canada	98%	29 Millions
Brazil	97%	114 Millions
Russia	97%	94 Millions
Colombia	97%	24 Millions
India	96%	391 Millions
Italy	96%	47 Millions
Australia	96%	17 Millions
Sweden	96%	7 Millions
USA	94%	224 Millions
Japan	94%	97 Millions
UK	94%	50 Millions
KSA	94%	23 Millions
Spain	93%	34 Millions
France	92%	45 Millions
Germany	91%	64 Millions
China	90%	637 Millions
Malaysia	86%	17 Millions

The real cost of pain: happiness

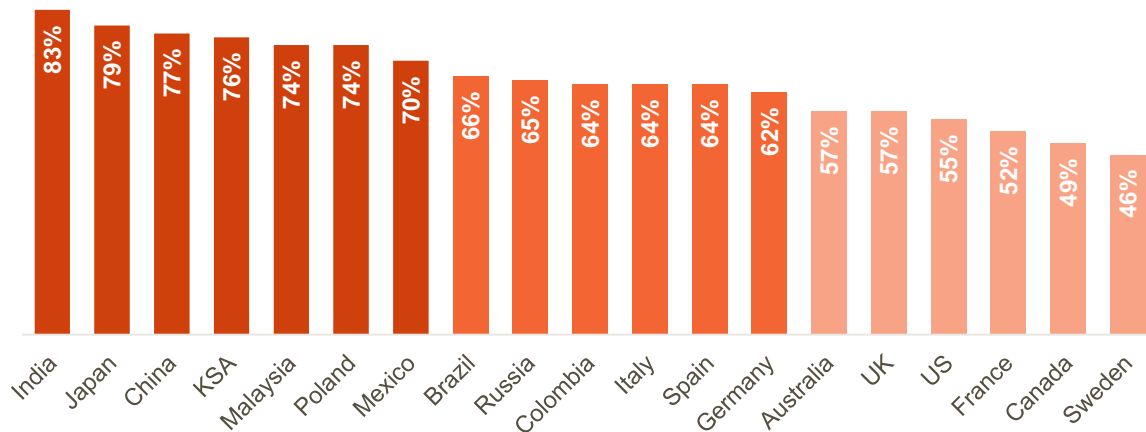
A fact which has increased since 2014



65%

cannot be happy
when experiencing pain

+ 14 pt. since 2014
(GPI 1 – Global 14)



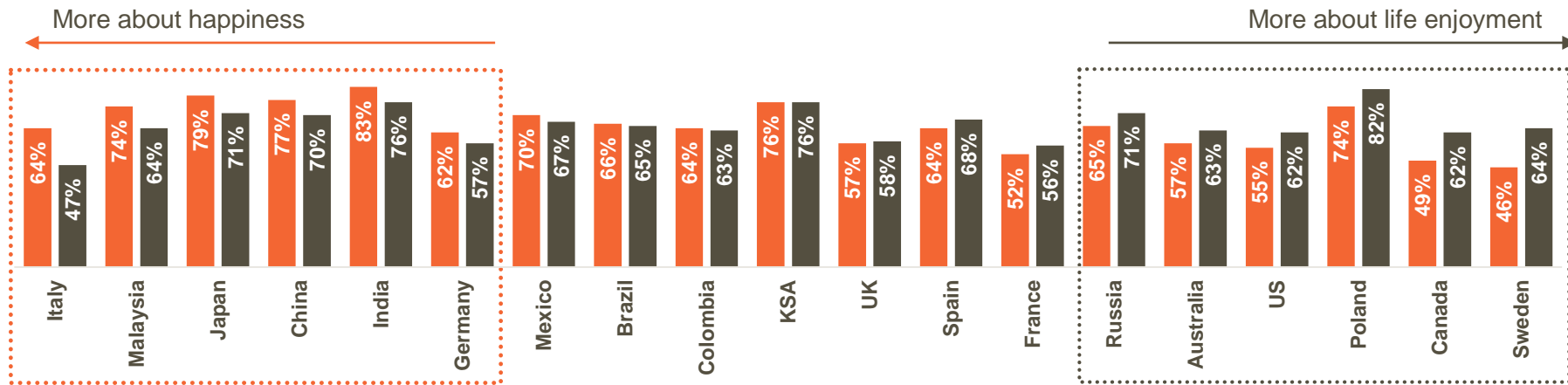
The real cost of pain

If not happiness, ability to enjoy life



65% cannot be happy
when I experiencing pain

65% agree pain impacts their
ability to enjoy life
+15pts compared to 2014 (global 14)



A reality not limited to adults



73% 

of parents describe **their child** as being **miserable** or not being their usual self when the child is in pain

(Net score)

Leaving
2 in 5 

parents feeling panic-stricken and helpless

(Net score: 40%)

Pain impacts quality of life

Changing daily routines of many



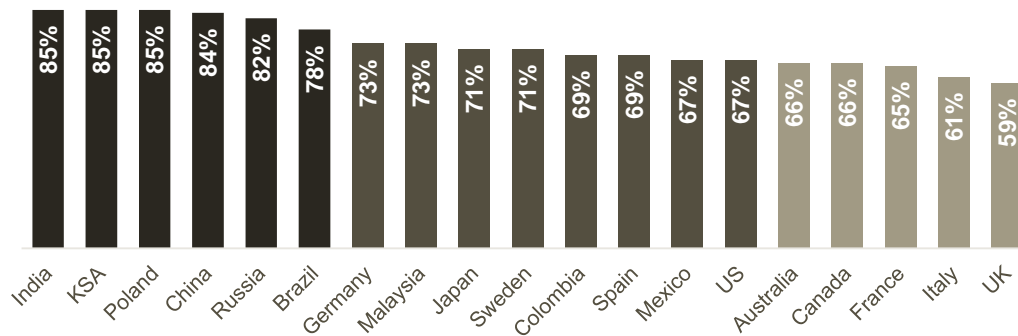
Only **22%**

Agree their pain has ...

“ **No impact at all,**
I do **not** change
my **daily routine** in
any way. ”

72%

say their pain decreases their **quality of life**



Pain can act as an aggravating factor of inequality



1 in 2 

parents have no one else
to look after their children
when they are in pain
(48%)

1 in 2 

Women say pain has a
high impact on their life
and they have to stop or
adapt their daily routine
(49% of women vs. 39% of men)

Pain impacts carers and worklife



manual worker said their pain has caused them **trouble at work,**

48% for other workers



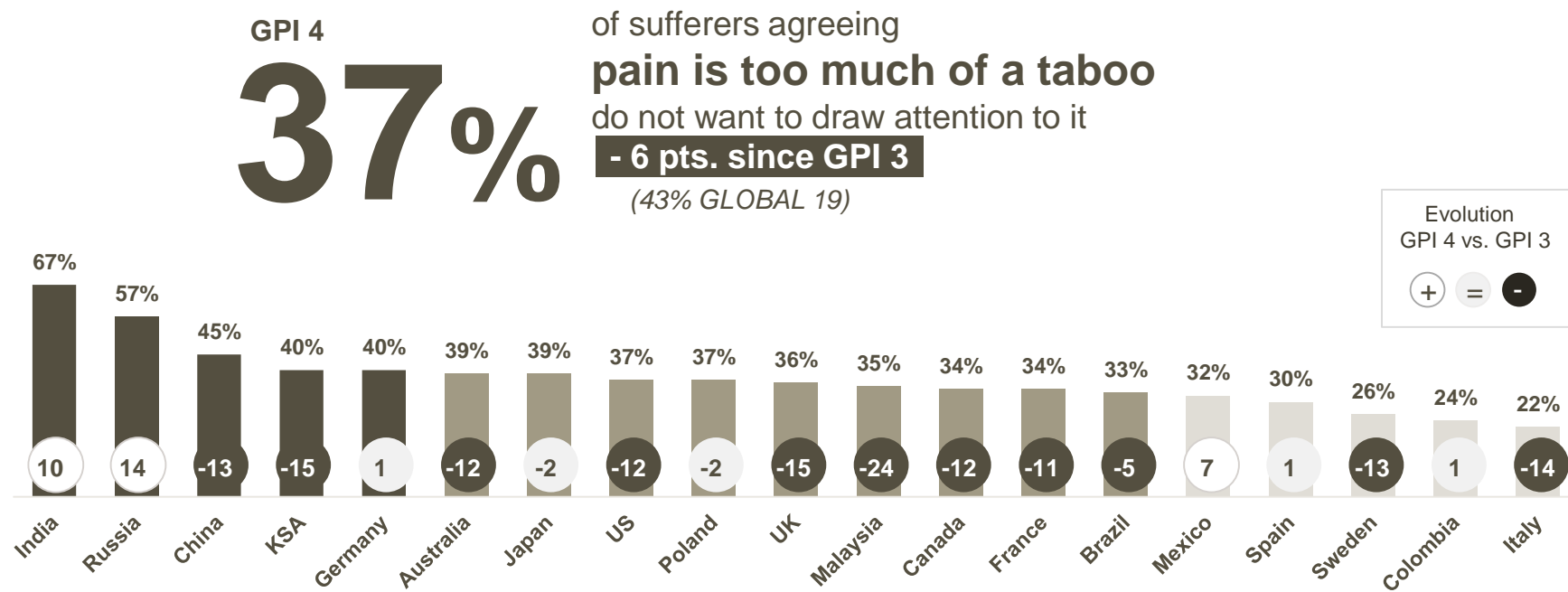
4 in 5

of **all** workers admit they are **less focused** or **less productive** when in pain.
(net score: 79%)

Mentalities are changing



More sufferers being open to talk about their pain



But not society

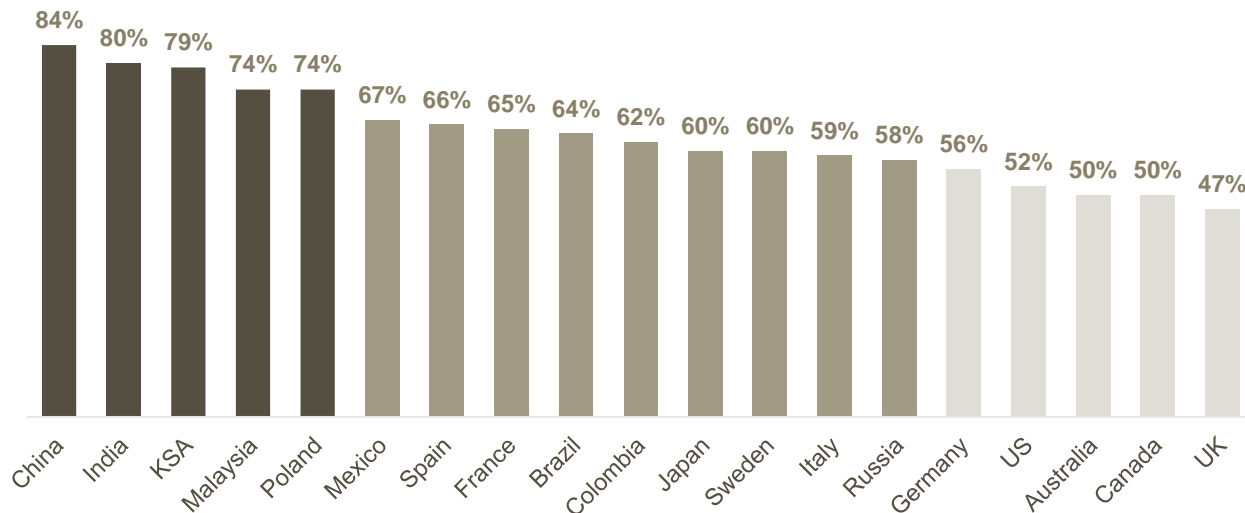


Low acceptance of pain is a social fact

63%

of sufferers
wishing pain was better
accepted in their
society

+16 pts. since GPI 3
(47% GLOBAL 19)



Pain controls sufferers, rather than the other way around



Only

18%

“ feel **completely in control** of
their ability to manage their pain ”

But

76%

“ wish they could **control**
their pain **better** ”

While being stoic is the norm

Most wish more could be done



73%

Declare...

*“I am **tough**, I can handle pain ”*

73%

*“Wish more could be done to **help manage** everyday pain ”*

76%

*“Want to **learn more** about how to manage their pain ”*

Expectations towards public authorities are growing



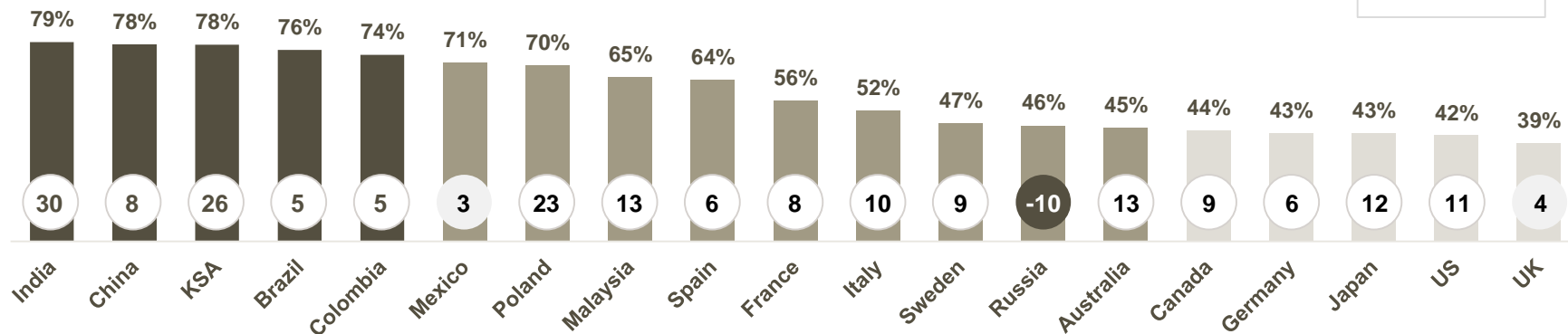
GPI 4
58%

Wish **public authorities** did more to help people like me manage their pain

+ 10 pts. since GPI 3

(48% GLOBAL 19)

Evolution
GPI 4 vs. GPI 3



Many sharing the growing expectations to see their pain taken more seriously by Healthcare professionals (HCPs)

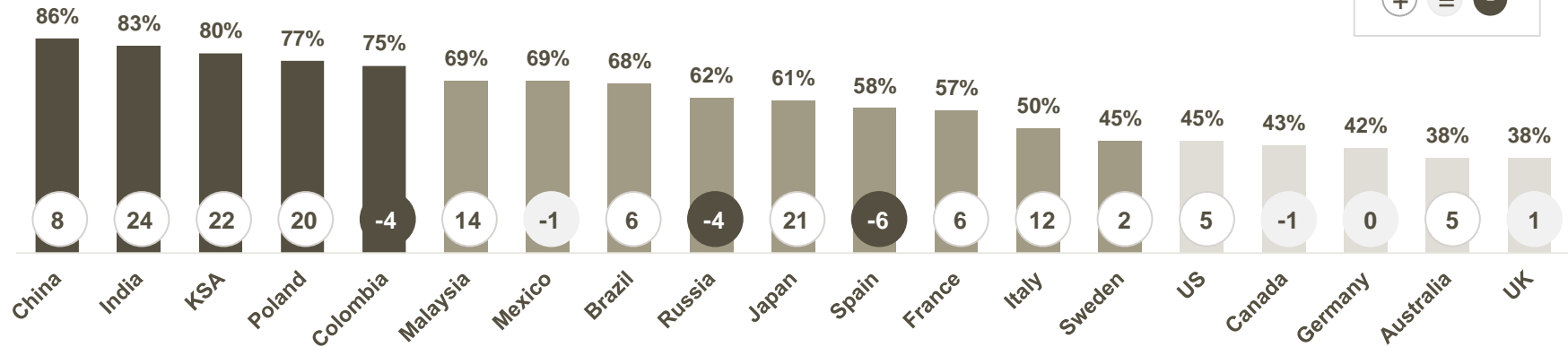


GPI 4
60%

Wish **doctors/specialists** took pain like theirs more seriously
+ 6 pts. since GPI 3
(54% GLOBAL 19)

Evolution
GPI 4 vs. GPI 3

+ = -



Pain becoming a critical component of the relationship with HCPs

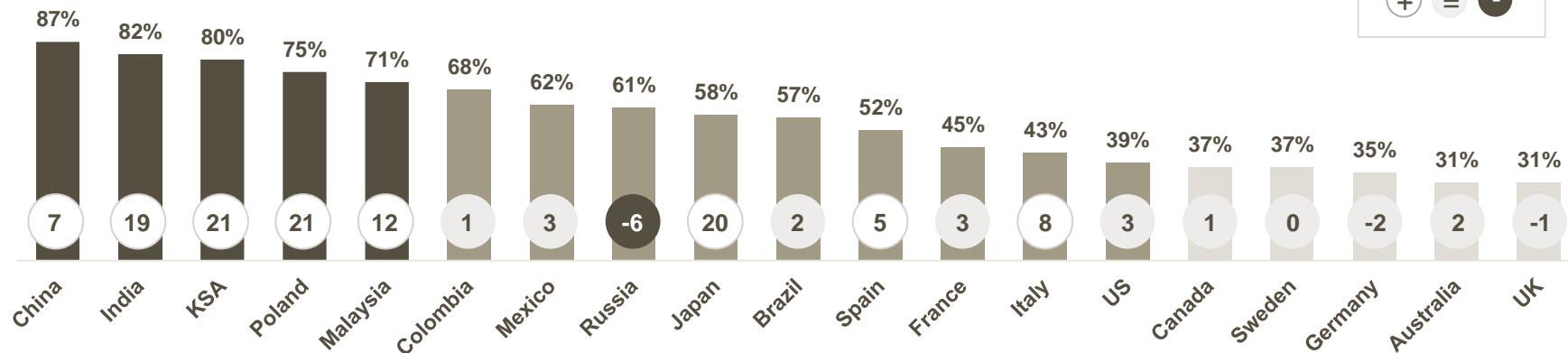


GPI 4
55%

wish their **doctor** would be **more supportive** when it comes to the impact of their pain on their life

+ 6 pts. since GPI 3
(49% GLOBAL 19)

Evolution
GPI 4 vs. GPI 3



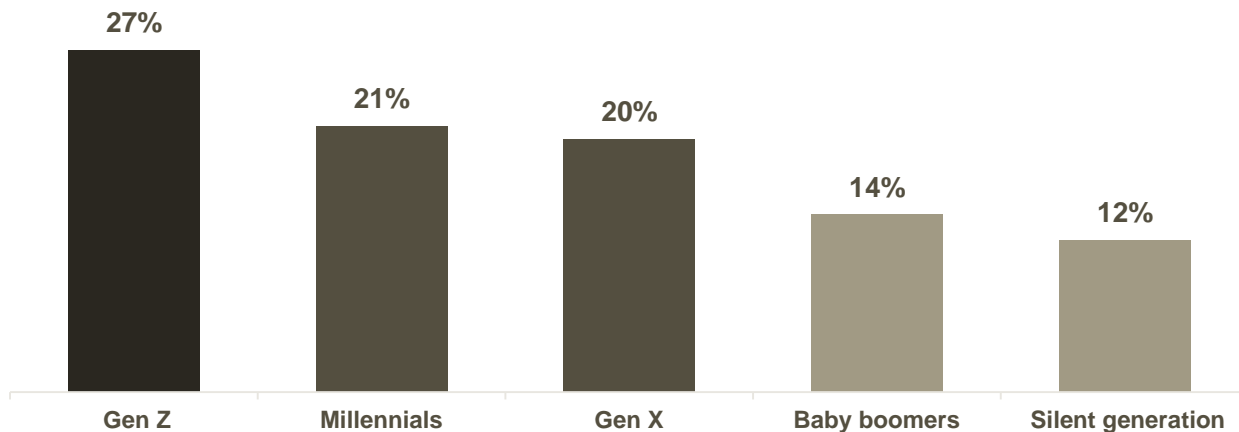
Doctor google



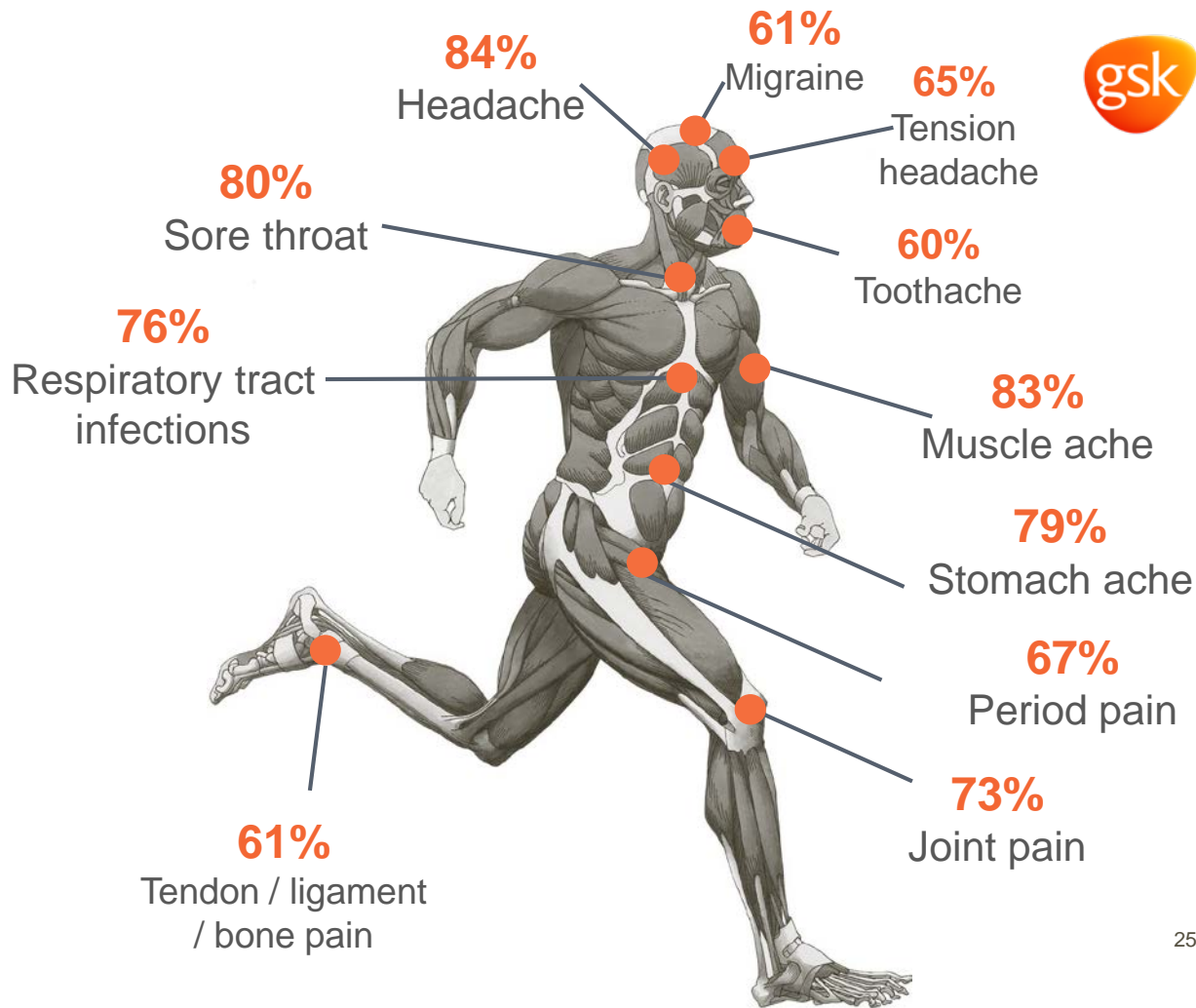
Younger generations rely more on their own research

19%

identified the cause of my
pain myself by conducting
some research



10
different pains
are
experienced
by an individual
in any typical year



Pains evolves with modern lifestyles



Is technology taking its toll?

Gen Z and Millennials are most likely to suffer certain body pains; reflecting their heavy use of technology



Too much
screen time?

Gen Z and Millennials
are more likely to
experience **headaches**

(90% compared to 79% among
other generations)



Addiction to
smartphones

Gen Z and Millennials
are **most likely to**
experience regular
neck/shoulder pains

(Neck/shoulder: 52% compared to
39% among other generations)



Heavy use of
headphones

Gen Z and Millennials
are **more likely to**
experience **earache**

(57% compared to 39% among
other generations)

Pain can create a favourable ground for other health conditions



For both
their physical health

4 in 5

say they are more
sedentary
when in pain; exercising
and/or moving less
(net score: 81%)

1 in 2

admit eating
comfort food
when in pain (51%)

And
their mental health

When in pain...

63% are unable to relax

60% get moody

61% are less sociable

41% feel useless

36% feel lonely



do more
feel better
live longer

Deep-dive on body pain

Jacky

Community research nurse
UK

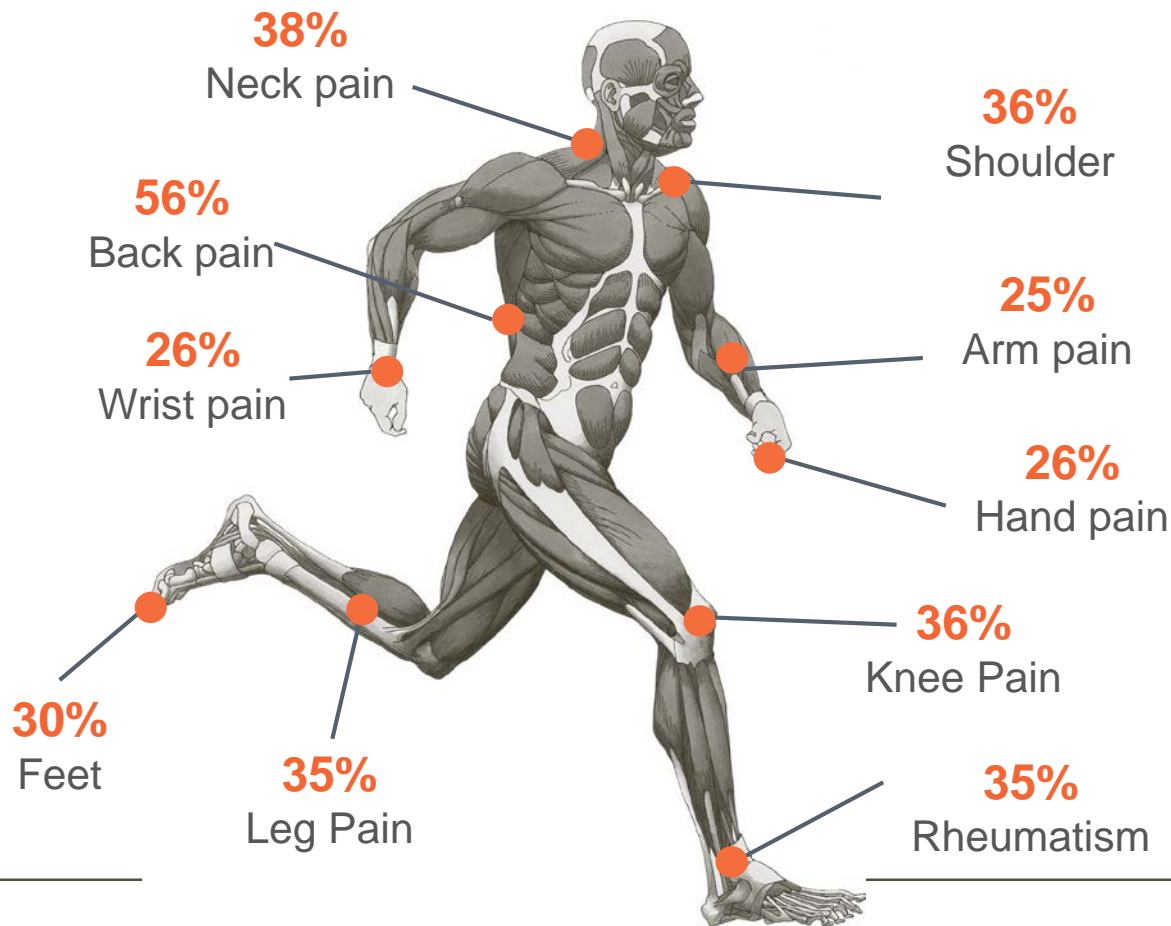
93%

**suffered from
body pain in
the last year**

83%	Muscle ache
73%	Joint pain
61%	Tendon / ligament / bone pain
49%	Pinched nerve
42%	Arthritis
35%	Rheumatism
38%	Osteoarthritis

63% suffer at least once a month
32% suffer on a weekly basis
27% suffer every day

**Over 1 in 2
experience
back pain
every month**



Body pain is often ongoing and felt on an episodic basis



Nearly **9 in 10** said their last experience of body pain was a **familiar pain** (89%)

Frequency of pain among those with familiar body pain:

26%

I feel this pain once in a while

29%

I have been experiencing flare-ups of this pain for **up to 6 months**

45%

I have been experiencing flare-ups of this pain for **over 6 months**

Sufferers are in pain for extended period of time



72% of body pain sufferers are in pain for extended periods of time

19%

I am in pain
constantly,
non-stop

26%

I am in pain for
several days

29%

I am in pain for
a **couple of**
hours or more

28%

I am in pain for
a short time, **an**
hour or less

Body pain sufferers are less likely to treat their pain



People suffering from body pain are **less likely to treat** than those suffering from general pain

(last body pain 88% vs. last general pain 94%)



Over half of body pain sufferers **wait to treat**

(last body pain 54%)

Body pain sufferers will treat with a combination of medication and physical therapies



People suffering from body pain will take **3 to 4 steps to treat on average**, favoring pain medication over other treatments



63%

Take pain medication



43%

Use physical therapy
e.g. stretching



48%

Rest /
Sleep it off



33%

Take non-medicated actions e.g. applying heat/cold



24%

Use relaxation techniques
e.g. meditation



20%

Use a medical device e.g. TENS machine

2 in 3 said their body pain impacts
their ability to enjoy life

(64%)

People move less when they suffer from body pain



72%

When I am in pain
I move less

71%

When I am in pain
I exercise less

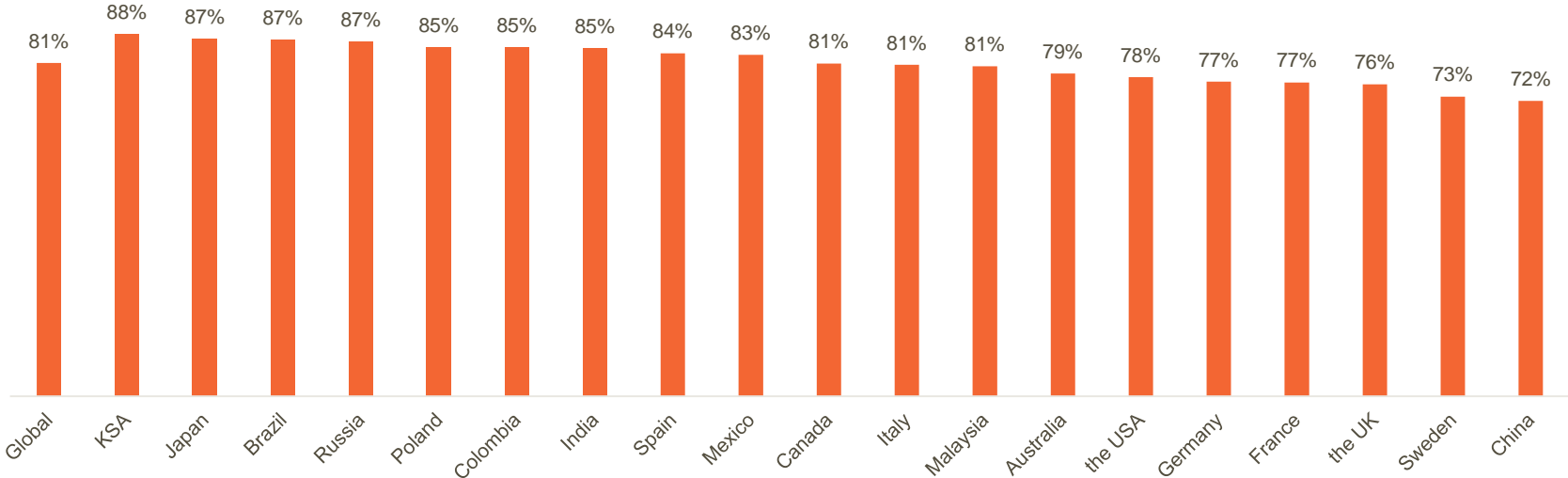
Sufferers are prevented from enjoying moving and exercising when in pain



I move less when I am in pain



8 in 10 sufferers say they are more sedentary when in pain



3 in **4** said they wish they could
control their pain better
(77%)



Body pain snapshot

Profile

58% of those **aged 45 and over** suffer from body pain

Duration

For **6 in 10** suffering from body pain, it **lasts at least several hours** (last body pain 60%)

Diagnosis of pain

One third who have experienced body pain **don't know or are not sure of what caused it** (last body pain 33%)

Severity

7 in 10 suffering from body pain **think that their pain is quite or very severe** (last body pain 74%)

Cause of pain

2 in 10 of those who know the causes of their body pain **have self-diagnosed** (last body pain 17%)



do more
feel better
live longer

Pain types snapshots

Janet
COPD patient
USA

Menstrual pain Snapshot

Prevalence of pain

8 in 10 (82%) women globally suffer from menstrual pain and as expected, this is mostly common among young to mid aged (18-44) women (93-95%). The prevalence is highest in the Middle East region (96%) followed by South & Central America (87%).

Severity of pain

1 in 3 (34%) women score their menstrual pain as very severe and in terms of severity, this is the second highest across all pains (second to Migraines, 42%).

Duration of pain

1 in 2 (49%) women experiencing menstrual pain are likely to suffer for longer periods (at least several hours). For 1 in 5 (19%), the pain can last up to several days.

Treatment of pain

9 in 10 (91%) of women who consider menstrual pain to be their most frequent pain, would treat their pain at some point and a third (33%) would treat at the very first signs of pain. Taking pain medication is the most common method of treating (70%). 6 in 10 (57%) would rest / sleep and about a third (29%) visit an HCP. Adjusting their diet as a way of treating isn't uncommon: 1 in 5 (22%) would try out drinking more water, healthy eating, etc.

Social attitudes

At least 8 in 10 (82%) women say that talking about menstruation is still not fully accepted in their society. It is generally regarded as a taboo across all regions but especially high in the Middle East (49%).

Migraines snapshot

Prevalence of pain

About 7 in 10 (68%) people globally suffer from Migraines. This seems more common among women (74%) and the mid age (18-44) group (75-79%). The prevalence is especially high with people living in the Middle East (77%) and South & Central America (72%).

Severity of pain

Migraines top the list in terms of severity across all pains where at least 2 in 5 (42%) say that they experience the pain at a very high level of intensity.

Duration of pain

About 6 in 10 (58%) Migraine sufferers experience the pain for a relatively long period (at least for several hours). 1 in 10 (9%) experience Migraines constantly whilst for some (21%) it can last up to several days.

Treatment of pain

Almost everyone (92%) who consider Migraines to be their most frequent pain, would treat their pain and 77% would treat within the first couple of hours; 36% would treat immediately / at the very first signs.

Taking pain medication is the most common method of treating (59%) and usually taken as the first step (36%), followed by resting / sleeping (55%).

2 in 5 (42%) would consult an HCP at some point in their treatment journey and visiting a doctor (24%) seems to be the mostly preferred choice compared to pharmacists (17%) and other HCPs (14%) when seeking advice.

Joint pain snapshot

Prevalence of pain

8 in 10 (79%) people globally suffer from joint pain. The prevalence is highest in the western part of the world: North America (85%) and Europe (81%). As expected, this is mostly common among the 55+ age group (84%). And men (80%) are more likely to experience this pain compared to women (78%).

Severity of pain

The severity of joint pain seems relatively low compared to other types of pain. Only 1 in 5 (21%) joint pain sufferers rate it as very severe whilst the majority rate it as quite severe (44%) or not severe (35%).

Duration of pain

1 in 2 (47%) joint pain suffers experience the pain for a long period (at least for several hours). However, a considerable amount of sufferers (39%) say that they experience it only for a short time (up to an hour).

Treatment of pain

9 in 10 (89%) who consider joint pain to be their most frequent pain, would treat their pain. And a third (28%) would treat at the very first signs of pain.

More than half (54%) would treat with pain medication and about a quarter (23%) would do this as the first step in managing their pain.

However, many are seeking non medicated relief as well: 46% would rest / sleep, 32% do some form of physical therapy such as stretching, etc. and 27% use non-medicated treatments such as applying heat or cold.

Given the high use of medication, 41% would visit an HCP at some point in their journey on pain management where 28% would visit a doctor and only 12% would visit a pharmacist or another HCP.

Arthritis snapshot

Prevalence of pain

1 in 2 (48%) people globally suffer from Arthritis. The prevalence of the disease is highest in the Middle East (64%), followed by North America (58%) and APAC (54%). The disease is more common among men (49%) compared to women (46%). And as expected, highest among the 55+ age group (around 53%).

Severity of pain

Only 1 in 4 (25%) rate their pain caused by Arthritis as very severe. They're more likely to rate the pain at a moderate level (47%) whilst some would rate as not severe (28%).

Duration of pain

Given the nature of the disease, well over half (65%) experience pain for a long period (at least for several hours). 1 in 4 (25%) claim to have pain constantly and a similar proportion (23%) would experience pain for several days.

Treatment of pain

Almost everyone (93%) who consider Arthritis to be their most frequent pain, would treat their pain.

Early treatment seems high where 7 in 10 (73%) would treat immediately or within the first few hours.

About a half (45%) would take pain medication at some point in their pain management journey, 1 in 5 (20%) would do so as the first step.

49% would visit an HCP where 31% would see a doctor whilst 20% would visit a pharmacist. A wide variety of non-medicated treatments are also being used: physical therapy such as stretching (34%), applying heat or cold (33%), sleeping / resting (32%), adjusting their diet (20%) and using relaxation techniques such as meditation (17%) seem popular.



Market snapshots

Yashwant
Diabetes patient
India

China market snapshot



Type of pain

People in China are **more likely to suffer from Arthritis/Osteoarthritis**, reflecting the ageing population (60% vs. 50% globally)

Severity of pain

People in China suffer **more severe pains** on average (36% describe their pain as severe vs. 31% on average)

Cause of pain

One in two people suffering in China said their **pain is linked to an injury or underlying health condition** (52% vs. 39% on average)

Duration of pain

People in China are more likely to suffer for longer periods, with **2 in 5 saying they are suffering for several hours at a time** (41% vs. 36% globally)

Impact of pain

Sufferers in China are more likely to say they **cannot be happy when experiencing pain** (77% vs. 65% on average) and **their pain impacts their ability to enjoy life** (70% vs. 65% on average)

Australia market snapshot



Focus on children's pain

Pain management journey

Parents in Australia take **3 to 4 steps on average when treating their children's pain** (slightly lower than the global average of 4-5 steps)

Treatment of pain

Over half of parents in Australia give their children pain medication (53% vs. 41% globally)

Sources of information

HCPs are the key source of information for parents in Australia when giving medicated treatments to children (61% vs. 54% globally); **equal proportions of parents seek advice from doctors (57%) and pharmacists (55%)**

Use of pharmacists

Seeking information via pharmacists (55%) is somewhat unique to Australia because only 44% of parents do so globally (third highest after Malaysia 63% and Poland 56%)

Colombia market snapshot



Focus on children's pain

Pain management journey

Parents in Colombia usually take **3 to 4 steps to treat their children** when they are in pain (slightly lower than the global average of 4-5 steps)

Sources of information

1 in 2 parents in Colombia **consult HCPs before giving their children pain medication** (49%)

Choosing medication

1 in 3 parents in Colombia **rely on medication they are already familiar with** to treat their children's pain (31%)

Treatment of pain

Parents in Colombia are more **likely to give their children pain medication** (57% vs. global average of 41%)

USA market snapshot



Type of pain

6 in 10 people in the USA
experience body pain
(last body pain 58%)

Pain management journey

People in the USA take between **4 to 5 steps to treat their pain**, slightly higher compared to the global average (3-4 steps globally)

Use of HCPs

Only 1 in 3 will consult an HCP as part of their treatment journey (32% vs. 39% globally)

Treatment of pain

One third of people in the USA will **take pain medication as the first step** for treating their pain (31%)

Though low, the USA has some of the highest use of **CBD or CBD oil-based treatments** (12%)

Point of purchase

7 in 10 people in the USA **buy their pain medication at a local drug or general store**, making it the favorite option (72% vs. 28% for doctor prescriptions and 17% for pharmacies)

India market snapshot



Type of pain

In India, **4 in 10** people suffer from **body pain** (43%)

And they're are the **most likely to perceive their pain as very severe** (44% compared to 31% on average)

Pain management journey

People in India take the **largest number of steps on average** (7-8) when treating their pain, being **more likely to use herbal remedies than average**

Use of alternatives

One third of people in India prefer to treat using **natural solutions such as applying heat/cold** (30%)

Visiting HCPs

People in India **commonly visit an HCP as part of their treatment journey** (60% compared to 39% on average)

Experience with HCPs

People in India feel they have the **worst experience when consulting HCPs**, with more than half having been talked down (68%) and over half being treated badly (56%) by doctors

Germany market snapshot



Waiting to treat

Germans have on average a higher tendency to **wait until they treat** their pain as almost **7 in 10** (67%) say they wait at least a couple of hours

Type of pain

4 in 10 people in Germany suffer from **body pain** (last body pain 44%)

Treatment of pain

Nearly **one third** of people in Germany said they try to **avoid taking pain medication or drugs** (32%)

Alternative treatments

2 in 10 people in Germany will use a **medical device to treat their pain** (19%)

Treating children's pain

German parents are on average less likely to give their children **pain medication** as the first step in treating their pain, as only **1 in 10 parents** (7%) say they do so

Pain is widespread and affects almost everyone



People who have/had pain (ever) vs. people who have suffered pain in the last year

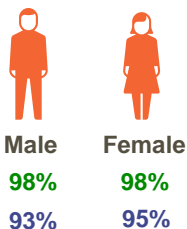
98%

Suffer or have
suffered from pain

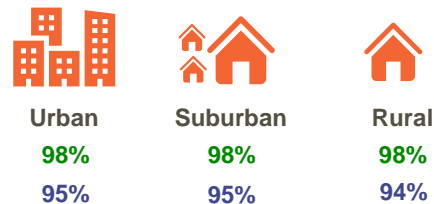
93%

Have suffered pain
in the last year

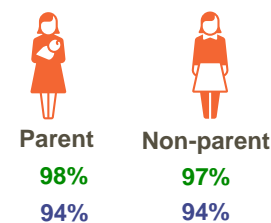
Gender



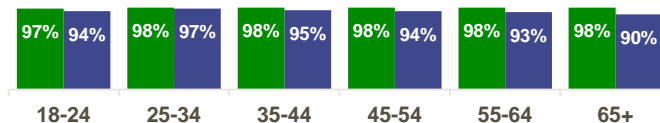
Living area



Parental status



Age breakdown



Employment status

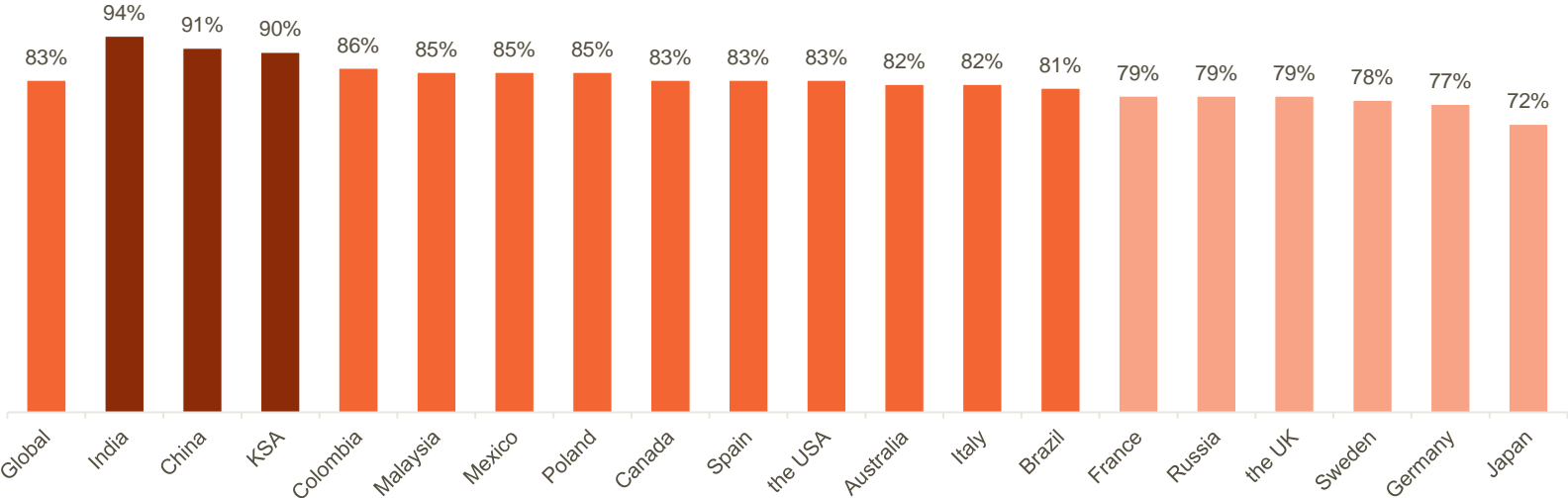


The impact of pain on quality of life is universal



% of sufferers whose quality of life is impacted by pain

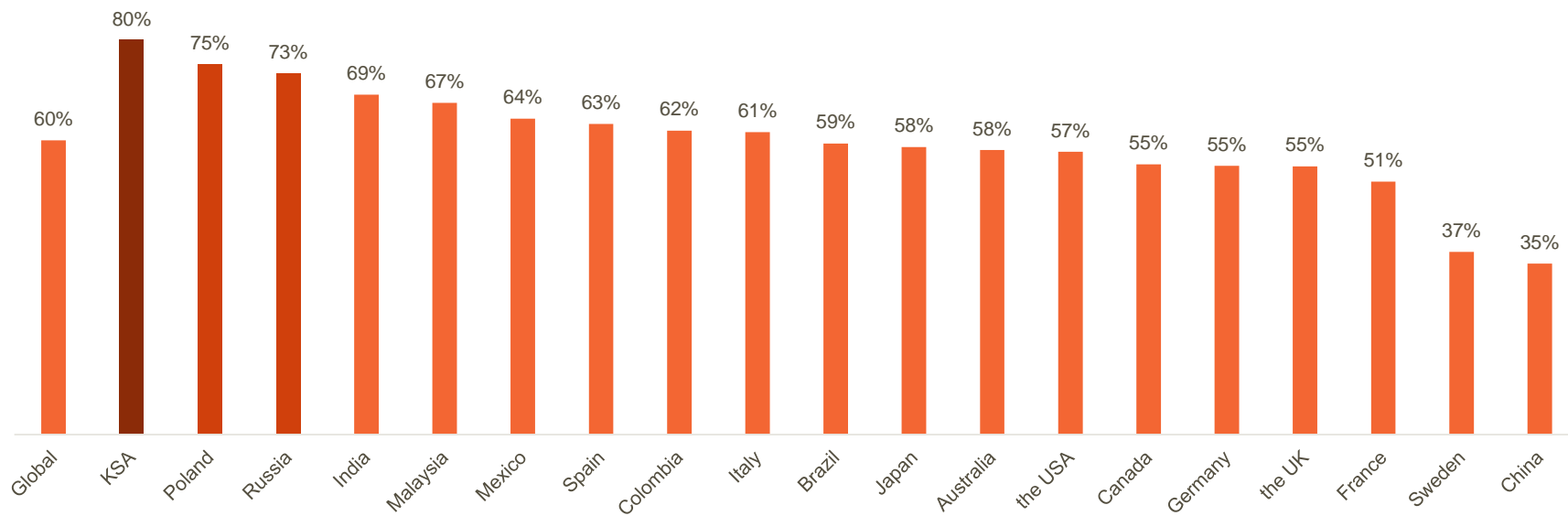
8 in 10 sufferers globally say their quality of life is impacted by pain



Pain is personal and the emotive impacts are felt differently across markets



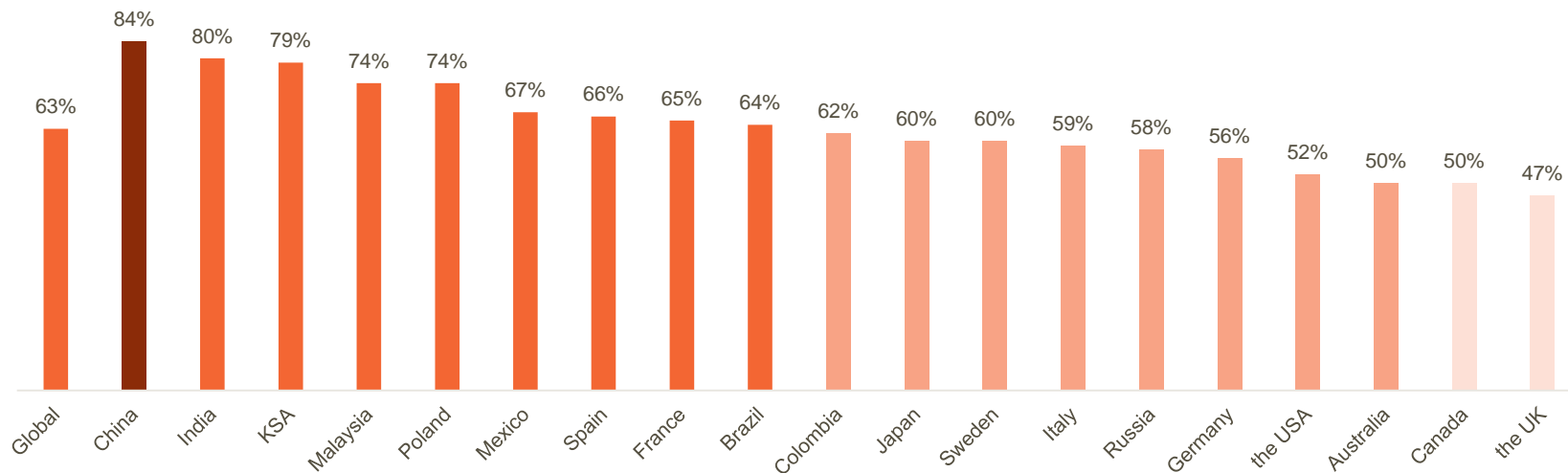
I am moody when in pain



Across the world, there is a lack of acceptance of pain in society



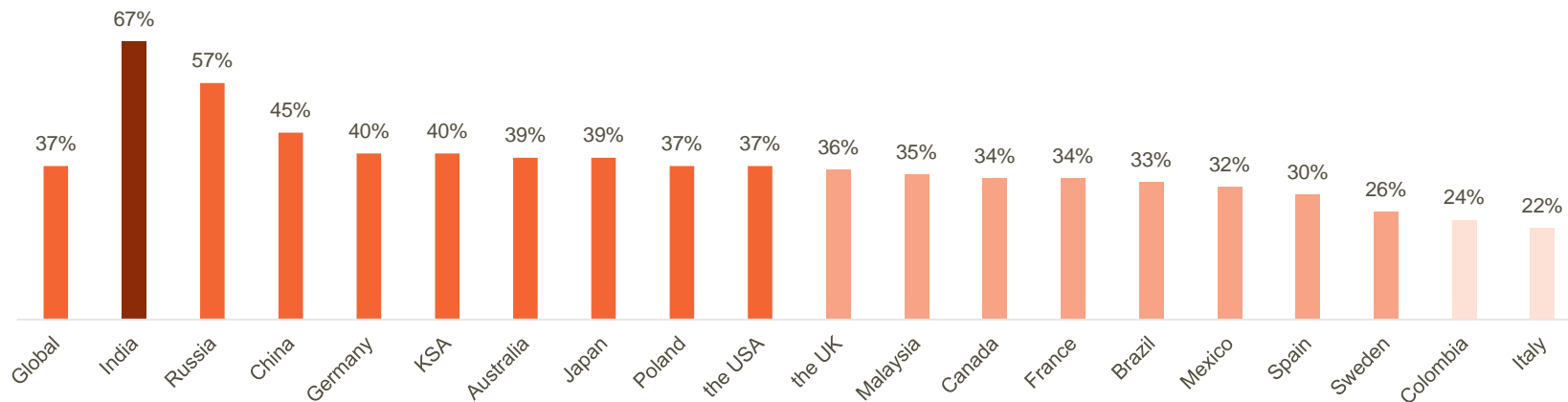
% of sufferers who wish pain was better accepted in their society



Despite being commonly experienced, Pain is considered a taboo in some cultures



% of sufferers who think pain is a taboo



People feel their pain controls them, rather than the other way around, and are eager for help in changing this



Feeling in
control

Only 18%

“I feel **completely in control** of my ability to manage my pain”

and 76%

“I wish I could **control** my pain **better**”

Managing
pain

76%

“I want to **learn more** about how to manage my pain”

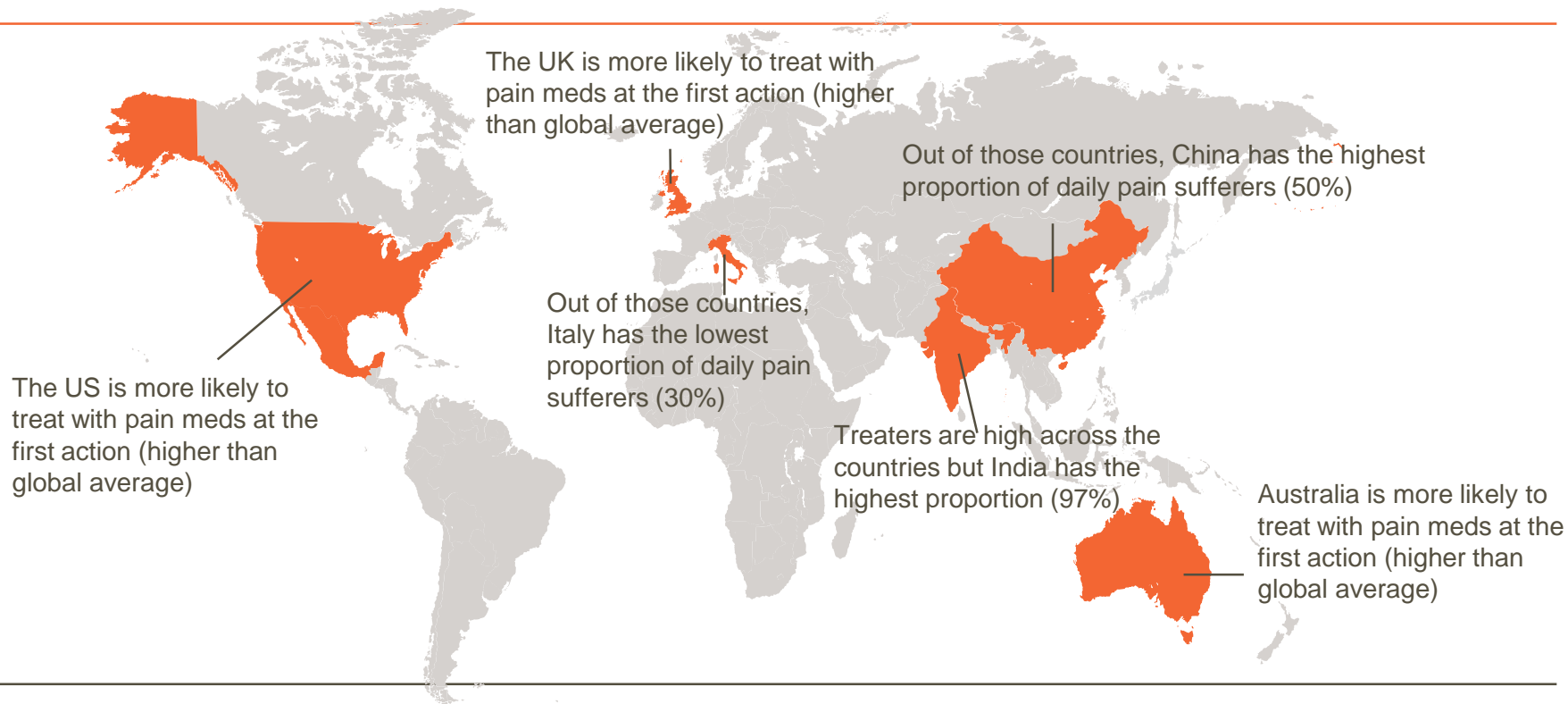
73%

“I wish more could be done to **help manage** everyday pain”

Spotlight on Australia, China, India, Italy, UK and US



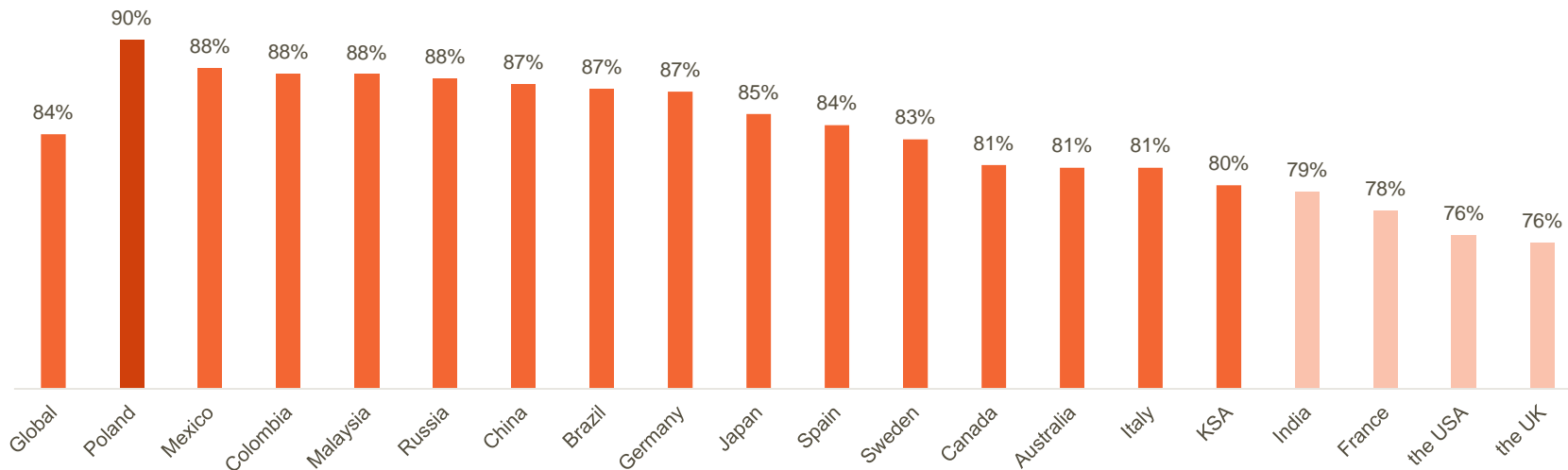
A comparison of 6 key markets



Many believe pain is a symptom that something is wrong, leading to anxiety about its cause



Pain is a natural warning that something is wrong



HCPs play an important part in the treatment journey for most markets



People in **India** are **most likely to visit an HCP** as part of their treatment journey

(60% compared to 39% on average)



People in **Sweden** are **least likely to visit an HCP** as part of their treatment journey

(22% compared to 39% on average)

6 in 10

Wish that HCPs **took their pain more seriously** (60%)

Over 1 in 2

Wish that doctors would be **more supportive** when it comes to the **impact** of their pain (55%)

The treatment journey is unique and highly complex



People in **India** take the **largest number of steps** on average when treating their pain (7-8)



Most likely to use **herbal remedies** than average

People in **Russia** take the **fewest number of steps** on average when treating their pain (2-3)



Most likely to take **pain medication**

The impact of Pain goes beyond the physical symptoms



Physiological impact

Severity
75% say their pain is quite or very severe

Frequency
61% suffer from pain weekly or more

Duration
55% are in pain for at least several hours

Emotional impact

65% can't be **happy** when they experience in pain

60% Are **moody** when they are in pain

47% say their pain makes them **anxious**

42% say pain negatively impacts their **self-esteem**

Quality of life impact

83% said pain has a negative impact on their **day-to-day**

72% say their pain decreases their **quality of life**



do more
feel better
live longer

Pain treatment journey

Dawn
Pharmacist
UK

Most take action on their pain, but over half delay treating (the longer the delay, the less likely to take medication)



Treat immediately

36%

Treat immediately

Treat at the very first signs of pain



73% will take pain medication



Wait to treat

40%

Wait hours

Wait a couple of hours in case it goes away, then treat



66% will take pain medication

16%

Wait days/weeks

Wait a couple of days/weeks in case it goes away, then treat



47% will take pain medication



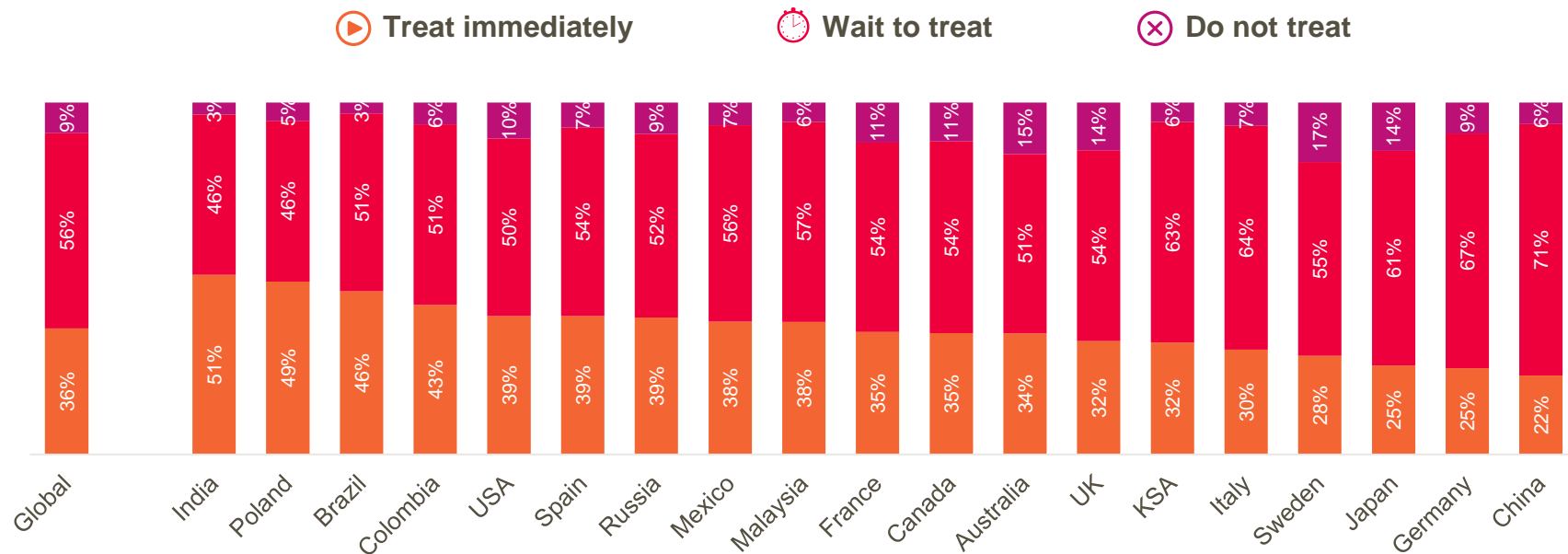
Never treat

9%

Never treat

Do not take any action to treat

The majority of sufferers globally wait to treat their pain



Wait longer before treating

Lack of information about pain impacts reticence to treat



Treat immediately

Feels pain **regularly** (daily/weekly)

Pain is ongoing, lasting for several hours/days, and felt at a higher intensity

Aware of what causes their pain; more likely to linked to underlying health condition



Wait to treat

Feels pain **occasionally** (monthly)

Pain usually lasts for a couple of hours and is moderate intensity

Have **less information** about the cause of their pain. Pain is sporadic and less likely to be linked to underlying condition



Never treat

Rarely feels pain

Pain tends to last for a short period (up to an hour) and is low intensity

Usually a known / ongoing body pain that flares up infrequently. Have **less information** about their pain (cause, duration of suffering)

Taking pain medication shortens suffering



1st



Those who **medicate** as their **first action** take **fewer steps to treat** (2-3 steps compared to 3-4 on average)



People who **delay** medicating **suffer for longer** (taking 5 to 6 steps to treat their pain)

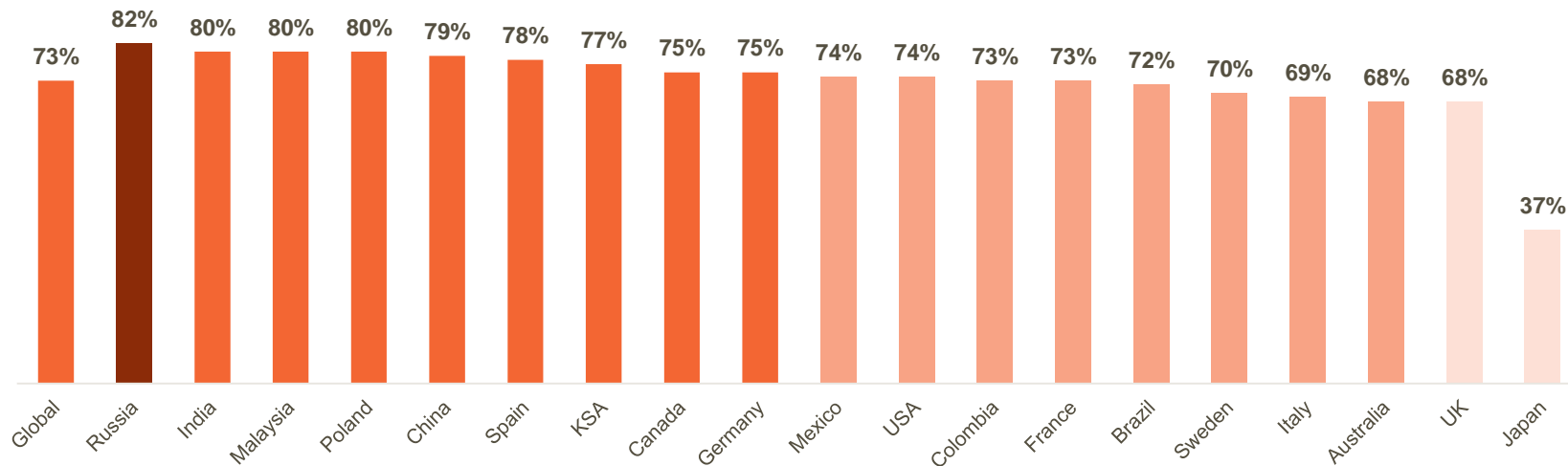


Those who **first treat with natural remedies** take much **longer to treat** their pain (7 to 8 steps on average), and many eventually take pain medication

There is widespread pressure to power through pain, Japan being the exception



% of sufferers who say they are tough and can handle their pain



The majority of late treaters do eventually take pain medication, so lengthening their suffering by waiting



Pain sufferers who wait to treat

Top 5 reasons for delaying treatment

	Would rather live with pain if not severe (49%)	Try to avoid medication / drugs (37%)	Worry about dependency / effects (34%)	Only seek relief when have more information (34%)	Prefer natural solutions (20%)
More likely to treat first by...	Take pain medication, rest/sleep, non-medicated actions	Rest/sleep, physical therapy	Long term adjustment – diet, relaxation techniques	Visit HCP	Rest/sleep, non-medicated actions, alternative medication
% that will eventually take pain medication	64%	65%	60%	67%	54%

Those who treat immediately **feel more in control of their pain** than those who wait to treat
(24% vs. 13%)



Parents' experience of pain

gsk
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live longer

Youraj and Prashant
Consumers
India

1 in 2

parents have **no one else to look after their children** when they are in pain (48%)

Parents must cope with their pain alone



2 in 5 parents

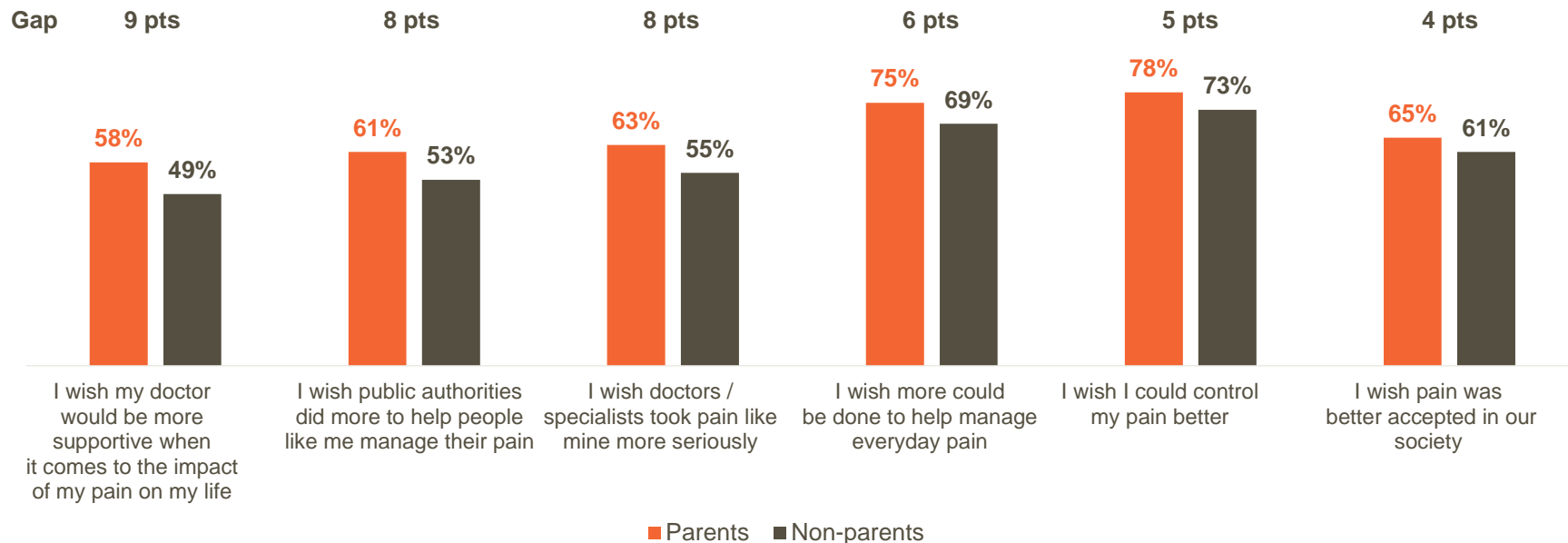


Said they were **unable to look after their children** when they are in pain (40%)

Parents are under pressure to treat their pain so **treat early** and are more likely to **take pain medication**

(treat early: 78% vs. 72% among non-parents)
(take pain medication: 60% vs. 55% among non-parents)

Parents are more likely to feel isolated and unsupported in managing their pain



Parents are under pressure to deal with their pain quickly



Parents are more likely than non-parents to:



Have **daily** pain (37% vs. 28%)



Have **long bouts** of pain (58% vs. 50%)



Be **early** treaters (78% vs. 72%)



More likely to **take pain meds** (60% vs. 55%)



Be **active** (79% vs. 73%) and less likely to rest to treat pain (**16%** vs. 22%)

3 in 4

parents are stoic in front of their pain ***“I am tough and I can handle pain.”***

(75% of parents vs. 68% of non-parents)

Parents feel guilty when in pain



“My pain does not only affect me, but the lives of those around me”

Parents **53%** vs. 40%

“Being in pain is too much of a taboo, I do not want to draw attention to it”.

Parents **39%** vs. non-parents 34%

“(When I’m in pain) I feel useless”

Parents **42%** vs. non-parents 40%





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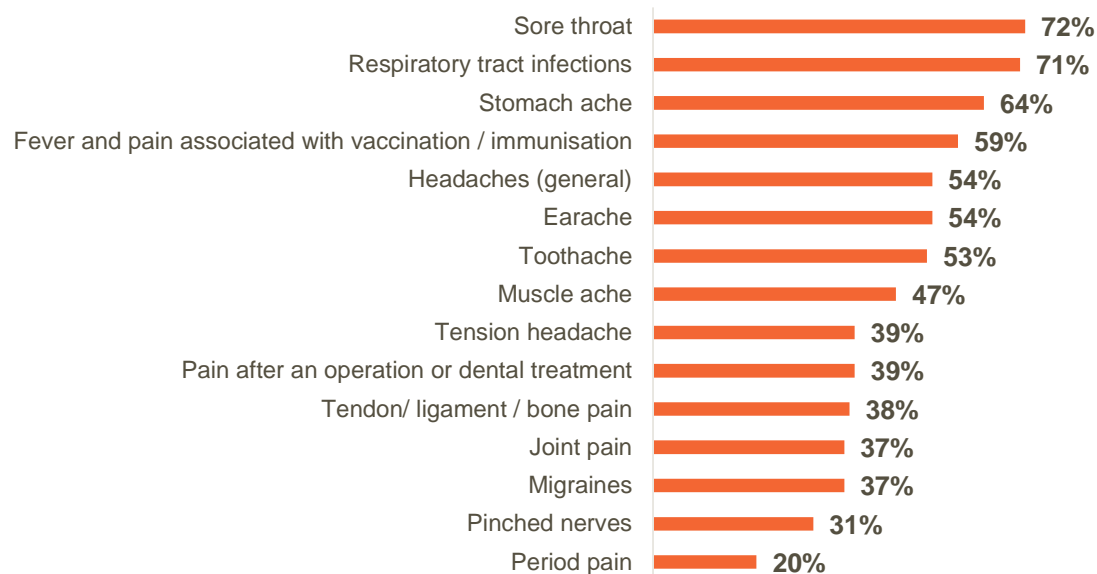
Children's Pain and Treatment

Sadie
Consumer
UK

Sore throats and respiratory tract infections have the highest prevalence among children



Prevalence of children's pain



Parents approach their children's pain journey in a similar manner to their own.

For example, those who adjust their own diet before treating will do the same for their children.

Role of the parents makes a difference in their children's treatment journey



Mothers



Are more likely to give their children **pain medication**

(Mother 37% vs. Father 31%)

Fathers



Are more likely to **consult an HCP** to treat their children

(Father 63% vs. Mother 59%)

Parents take **3 to 4** steps on average
to treat their own pain but **4 to 5** steps
to treat their children's pain.

Parents feel heartbroken and panic stricken when their children are in pain



When my child is in pain...

3 in 4

They are miserable or
not their usual self (73%)

2 in 5

I panic and don't
know how to help (40%)

Children's pain journeys are prolonged by reticence to treat



The longer treatment journey for children appears to be **reticence** to give their children pain medication.

Parents who treat themselves with pain medication as a first step, treat themselves and their children in 3 to 4 steps.



Children whose parents favour alternative therapies in treating their own pain have the longest pain journey: **9 to 10 steps** on average (and 23% do eventually treat).

Parents seek information before treating children's pain



The information journey

Parents are looking at 2 to 3 sources of information when it comes to their children's pain:

- HCPs (54% - male parent skew)
- Stick with what they know (36% - female parent skew)
- The Internet (24%).

Parents who favour alternative therapies are less likely to look for information from Doctors or Pharmacists.



Gen Z parents: it is all about alternatives.



Gen Z parents are **more likely** to:

- Seek information (**19%** vs. 16%)
- Visit other HCPs (**21%** vs. 14%)
- Use non-medicated actions (**18%** vs. 12%)
- Use rest / sleep (**27%** vs. 21%)
- Give herbal remedies (**11%** vs. 7%)
- Use a medical device (**9%** vs. 6%)

Gen Z parents **less likely** to:

- Give pain medication (**24%** vs. 34%)
- Visit an HCP, particularly Doctors (**34%** vs. 43%)



Gen Z treatment journey

Aurore and Aude
Belgium

Gen Z are most reluctant to treat their pain



Gen Z are **most likely** to
wait before treating

60% compared to 56% among other generations



Gen Z are **least likely** to
take pain medication

58% compared to 65% among all generations

Gen Z are less likely to medicate, despite being the most open to taking medication of all generations



	All generations	Gen Z	Millennials	Gen X	Boomers
Take pain medication	65%	58%	66%	69%	63%
Try to avoid medication	37%	30%	35%	35%	44%

Younger generations often delay treatment, with many not knowing how to seek relief



	All generations	Gen Z	Millennials	Gen X	Boomers
Treat pain immediately	36%	29%	33%	39%	38%
Seek more information before treating	34%	38%*	37%	31%	30%

Gen Z and Millennials are most likely to suffer certain body pains; reflecting their heavy use of technology



Too much
screen time?

Gen Z and Millennials
are more likely to
experience **headaches**

(90% compared to 79% among
other generations)



Addiction to
smartphones

Gen Z and Millennials
are **most likely to**
experience regular
neck/shoulder pains

(Neck/shoulder: 52% compared to
39% among other generations)



Heavy use of
headphones

Gen Z and Millennials
are **more likely to**
experience **earache**

(57% compared to 39% among
other generations)

**Only 3 in 10
will visit a doctor as part of their
treatment journey**

(28% vs. 32% other generations)

Gen Z feel their pain is not taken seriously by HCPs



Only **3 in 10** 

Gen Z will **visit a doctor**
as part of their treatment
journey (28%)

1 in 4 did not feel their pain was
taken seriously last time they
visited a doctor (25%)

1 in 3 feel they have been **talked
down to** by a doctor before (33%)

Gen Z are less likely to seek advice from a doctor, feeling less comfortable talking about their pain



	Other generations		Gen Z
I felt comfortable talking to them about my pain	88%	-7pts	81%
I felt like my pain was taken seriously	83%	-8pts	75%



Nearly 1 in 4
were *not* satisfied with the outcome of
their last visit to the doctor

(23% vs. 18% on average)

Gen Z seek more clarity on treatment and pain management from HCPs



	Other generations		Gen Z
I left with a better understanding of my treatment options	83%	-5pts	78%
I was given sufficient information to help me decide how to manage my pain	82%	-6pts	76%
I left with clear answers about my pain	81%	-9pts	72%



Speaking to a doctor of the same gender and more information can improve the experience with HCPs



Gen Z feel more at ease with doctors of the same gender



56%

- I feel **more comfortable** discussing my pain with a doctor that is the same gender as mw
- +13 pts vs. other generations



53%

- I feel **better understood** when describing my symptoms/experience with a doctor that is the same gender
- +11 pts vs. other generations



Gen Z call for more guidance from HCPs

- A **clear recommendation** on how to treat my pain (**42%**)
- More information about the **causes** of my pain (**41%**)
- More information about **how to manage** the symptoms of my pain (**38%**)



Is there a gender
bias in pain?

1 in 2 women

*say pain has a **high impact** on their life and they have to **stop or adapt** their daily routine.*

(49% of women vs. 39% of men)

Women feel significantly less in control of their pain than men do



“I feel **in control** of my ability to manage my pain so it doesn’t impact on my day-to-day activity.”

69% of **women** vs. 76% of men

“My **pain takes over and controls** how I feel, what I can do”

53% of **women** vs. 45% of men

“I wish I could **control my pain better.**”

44% of **women** vs. 39% of men

“I wish **more could be done** to help manage everyday pain.”

39% of **women** vs. 34% of men

Women are more likely to be early treaters...



...and to treat with medication.

- **79%** of women vs. **72%** of men are **Early Treaters**...
- ...**30%** of women vs. 27% men take medication as the first step in their treatment journey, and **64%** of women vs 56% of men **take pain medication** to treat their pain at some point in their journey.
- However, women are also **more likely** to:
 - Take non-medicated actions to alleviate pain e.g. applying heat/cold (**25%** vs. 21%)
 - Rest/sleep it off (**51%** vs. 45%)
 - Adjusting diet (**21%** vs. 18%)



Women are less likely than men to visit
any HCP when managing their pain

(35% vs. 42%)

Why?

Women are more likely to feel HCPs do not take their pain seriously



“My pain is taken **seriously** by Healthcare professionals”

(**67%** vs. 70%)

“I have been **talked down** to by a doctor when discussing my pain”

(**31%** vs. 28%)

“I have been **treated badly by a doctor** when discussing my pain”

(**23%** vs. 20%)

Women wish for more understanding from HCPs



“I wish my doctor would be **more supportive** when it comes to the impact of my pain on my life”

(**28%** vs. 25%)

“I wish doctors/specialists **took pain like mine more seriously**”

(**33%** vs. 29%)

“I would like **greater empathy and understanding** from the Healthcare professional”

(**35%** vs. 30%)

Women feel more comfortable and better understood by female doctors



“I have felt better understood when describing my pain symptoms/experience to a doctor who is the same gender”

(**45%** vs. 41%)

“I feel more comfortable discussing my pain with a doctor who is the same gender as me”

(**47%** vs. 41%)



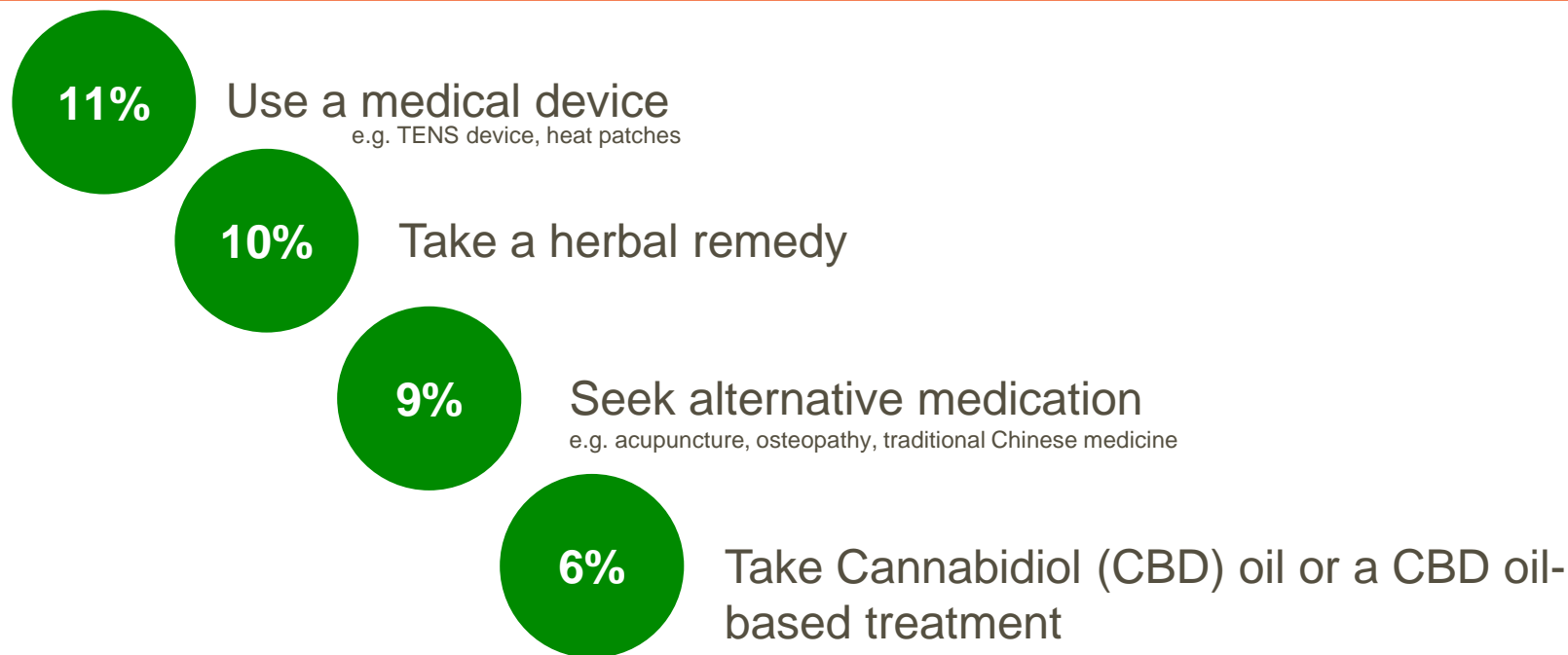
A young boy with dark hair, wearing a yellow and blue striped shirt over a yellow t-shirt, is smiling at the camera. He is sitting next to a man with dark hair, wearing a light blue button-down shirt. The man is looking down and writing in a notebook with a red pen. They are both sitting on a couch in a room with large windows in the background, showing green foliage. A large, semi-transparent orange shape is on the left side of the image.

Alternative treatments

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Youraj and Prashant
Consumers
India

Alternative treatments remain uncommon



Younger sufferers are more likely to take non-medical solutions, while older ones rely more on medical devices



Age



Regions



- **Younger age groups** (Gen Z, Millennials) are more likely to take a **natural treatment** or **seek alternative medication**

- People in **APAC** are more likely to seek **alternative medication** (12%)
- People in the **Middle East** (20%) are most likely to take a **herbal remedy** across regions



- **Older age groups** (Baby Boomers, Silent generation) are more likely to use a **medical device**

- **Medical devices** are most popular in **North America** and **APAC** (12%), followed by **Europe** (11%).

Use of natural remedies makes the treatment journey longer



1 in 4

Will use **natural remedies** during their treatment journey (25%)

People who use natural remedies take **7 to 8 steps in their treatment journey**



Over 6 in 10

Of those who use natural remedies **will also take pain medication** to treat their pain (65%)



Thank you