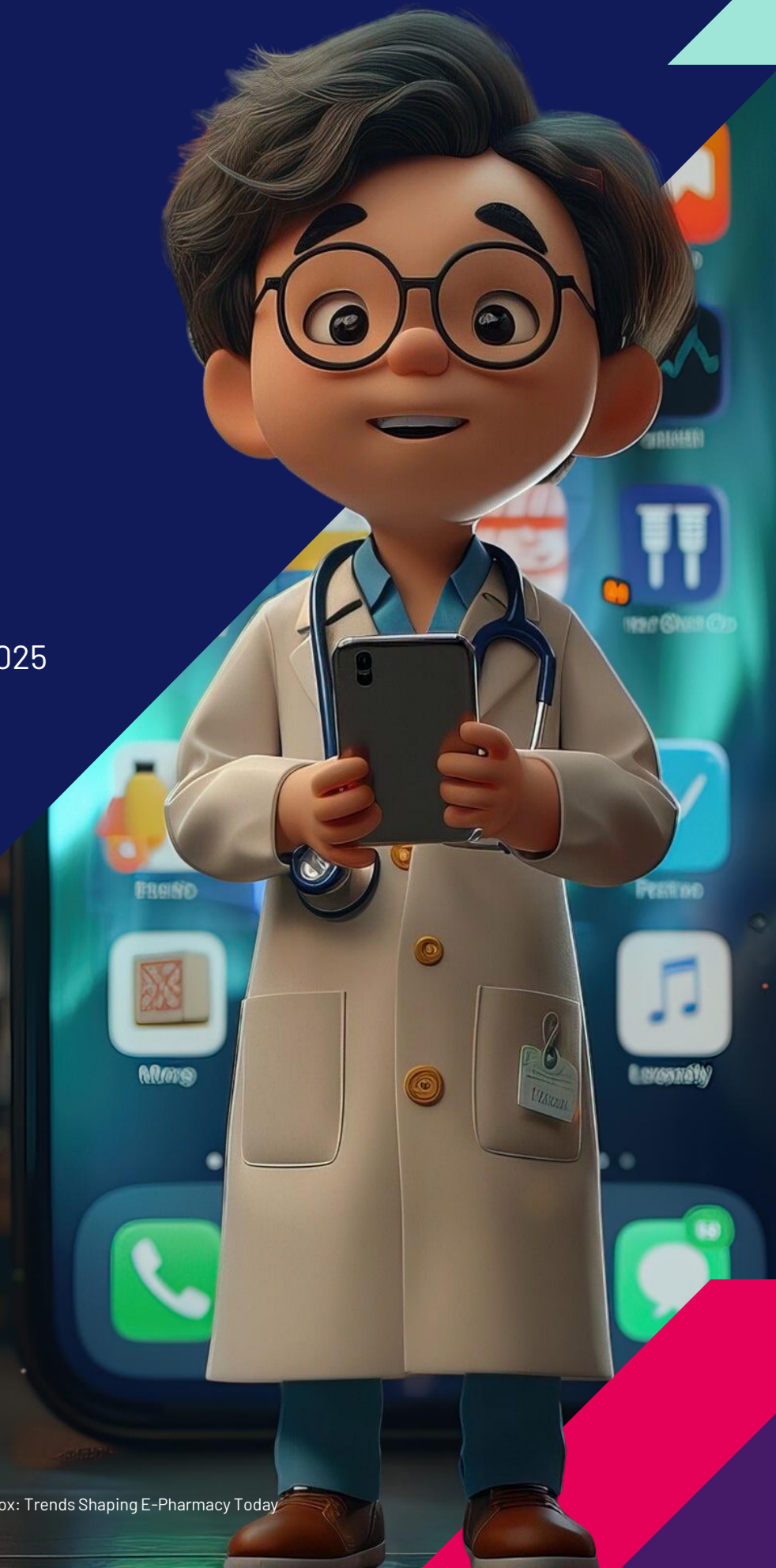


# The Virtual Pillbox:

Trends Shaping E-Pharmacy Today

August 2025



**"In India, where over 6 lakh pharmacies operate, the traditional model thrives on mutual trust and familiarity between customers and their neighbourhood chemists.**

**However, e-pharmacies have entered the scene, offering the same trust but with added savings and convenience."**

Emerging trends in online pharmacies:  
What 2025 could hold for digital  
healthcare - The Economic Times



Remember when getting medicines meant a trip to the neighborhood chemist, complete with that familiar smell of antiseptic and the reassuring presence of the pharmacist who knew your family's medical history? Those days aren't gone, but they're certainly being challenged by a digital revolution that's quietly transforming how Indians access healthcare.

The numbers tell an interesting story. While India's e-pharmacy market is projected to reach USD 12.7 billion by 2033 from USD 3.18 billion today<sup>1</sup>, the Ipsos Online Shopper Survey 2024 shows that only **4-5% of urban Indians buy medicines online**. Adoption is heavily concentrated in metros at 11% incidence and among NCCS A consumers at 8% incidence, according to the same Ipsos study. It's a classic case of early-stage disruption with lots of potential but still figuring out how to crack the mass market.



## Incidence of online medicine purchase

Male



4.5%

Female



4.7%

18-30 yrs



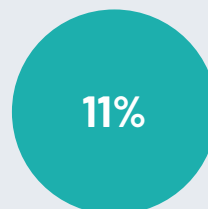
31-45 yrs



45 yrs



Metro



T1



T2



T3



NCCS A



NCCS B



NCCS C



Source: Ipsos Indiabus Shopper survey, Dec 2024 (n=2200)



1. <https://www.imarcgroup.com/india-online-pharmacy-market>

# The Rise of Digital Adoption

E-pharmacies are gaining momentum by addressing real gaps in convenience, affordability, privacy, and access to medical information. Let's explore these in detail:

## The Convenience Factor is Real

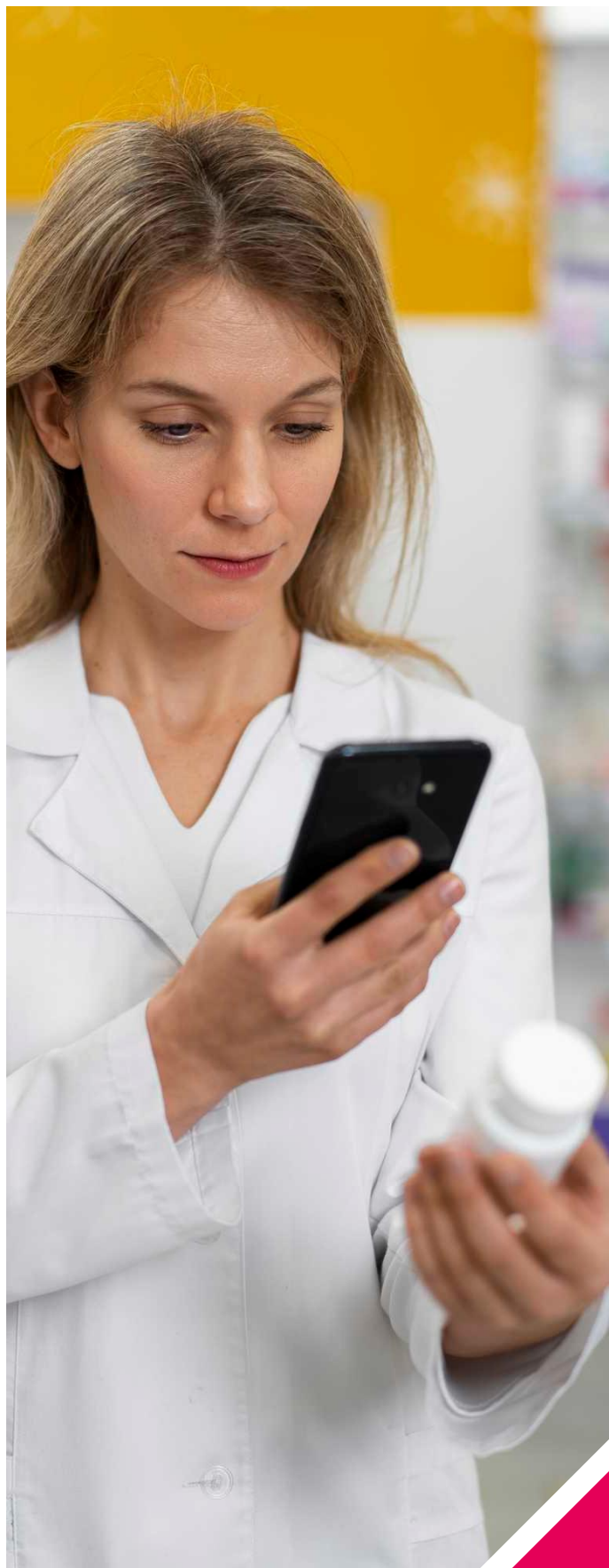
There's something genuinely liberating about ordering medicines from your couch, especially when you're dealing with a screaming toddler with fever or managing an elderly parent's diabetes medications from another city. The "Silvers" demographic, our parents and grandparents, are increasingly comfortable having their tech-savvy children order medications remotely. It's become a new form of family care that works surprisingly well.

## Money Talks, and It's Saying "Save"

Here's where e-pharmacies hit a sweet spot. While local pharmacists provide discounts up to 10% for regular customers, e-pharmacies provide ~18-20%, which adds up significantly when you're buying the same hypertension medication every month for years. For chronic patients, these savings add up to real money, sometimes enough to afford an extra diagnostic test or consultation.

## Prescription Medicines Are the Real Business

Prescription medicines dominate e-pharmacy purchases. Once you're diagnosed with diabetes or hypertension, you become a predictable customer with monthly needs. It's not impulse buying, it's a necessity, and that creates the kind of recurring revenue that makes business models work.



# The Rise of Digital Adoption



## CONVENIENCE

*"No more rushing to the pharmacy before it closes or dragging yourself out when you're sick, just order from bed and it shows up at your door"*



## DISCOUNTS

*"Why pay full price when I can get the same medicines cheaper online? The savings really add up, especially for regular prescriptions"*



## RECURRING NEED

*"I don't have to remember to pick up my diabetes medication every month anymore – it just arrives when I need it, and I'm saving money too"*



## PRIVACY

*"I can order my antidepressants or other personal medications without feeling judged or having awkward conversations with the pharmacist"*



## INFORMATION

*"Finally, I can actually understand what's in my medicines and see if there's a cheaper generic option – something my chemist never really explained"*

### Privacy Matters

Let's be honest: buying antidepressants or sexual health medications at your local chemist can feel uncomfortable. The anonymity of online ordering removes that social awkwardness. As mental & sexual health awareness grows, more people recognize they need treatment, expanding the market. While conversations become less taboo, the preference for medical privacy in purchasing sensitive medications remains strong, making e-pharmacies' anonymity advantage increasingly valuable to this growing customer base.

### Greater Access to Information

Online platforms provide easy access to comprehensive information about medicines, including composition, side effects, and generic substitutes. They also offer wider product ranges, including medications potentially unavailable at local pharmacies, which particularly benefits people seeking less common treatments.

# Roadblocks to Mass Adoption

Despite its promise, the sector is challenged by lingering trust deficits, supply chain hiccups, policy uncertainty, and technology-related friction points. Overcoming these hurdles is key to unlocking mass adoption across diverse consumer groups.

## The Trust Problem Still Lingers

Here's the thing that keeps most people away: trust. When your local chemist hands you a strip of tablets, you can check the expiry date, feel the packaging, even ask questions. Online, you're trusting a faceless platform with your health. Stories about fake medicines don't help, and there's this persistent worry that online pharmacies dump their near-expiry stock on unsuspecting customers.



## Nobody Likes Empty Shelves

We have all become impatient shoppers thanks to e-comm and quick commerce apps. Ipsos Report "[Clicking into the Future: Trends driving India's Shopping Surge](#)" identifies the growing trend of impatient shoppers, where stockouts translate to lost opportunities. When your fever medicine is out of stock, you don't wait, you go to the nearest pharmacy. E-pharmacy platforms haven't quite figured out demand planning for healthcare, where "stockout" isn't just inconvenient, it's potential health risk.



## Returns Are Complicated

Your local pharmacist might take back that unused strip of antibiotics when your infection cleared up faster than expected, but online platforms don't offer returns. When prescriptions change mid-treatment or when you accidentally order the wrong strength, you're stuck with medicines you can't use. This inflexibility creates real barriers, especially for patients dealing with evolving treatment plans.





# Roadblocks to Mass Adoption



## TRUST

Trust manifests as:

- Assurance of original medicines (and not counterfeit)
- Longer expiry date
- Chemist to address queries



## STOCK OUTS

Given the "immediate" requirement of most medicines, stock-out situation will drive customers to competition or offline purchase



## RETURNS

Local pharmacists provide option to return "unused" medicines

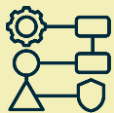
No flexibility of return in online purchase



## PRESCRIPTION

Inability to upload prescription

Local pharmacists may give medicines based on relationships and regular usage



## REGULATORY FRAMEWORK

Legal Framework is still evolving, and uncertainty prevails

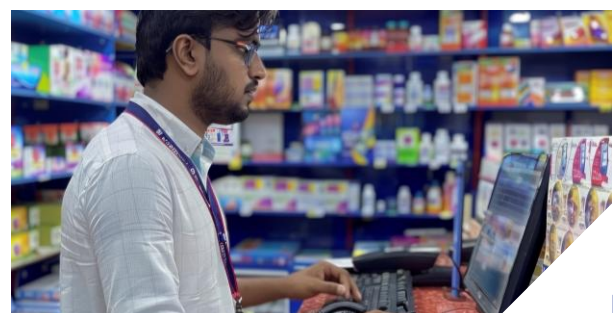
## The Prescription Upload Hassle

Ever tried uploading a prescription photo on a shaky phone connection? Or realized you need your regular diabetes medication but left the prescription at your hometown doctor? These friction points send people back to their local pharmacy where relationships and flexibility matter more than perfect documentation. Though some platforms offer consultations with empaneled doctors who can provide prescriptions, the inability to upload prescriptions immediately drives away potential consumers.



## Regulatory Uncertainty Lingers

The legal framework for e-pharmacies in India is still evolving, which creates uncertainty for both platforms and consumers. While progress is being made, unclear guidelines still impact confidence in the sector.





## What This Means for Brands

For pharma brands, e-pharmacies open new opportunities to build direct relationships, drive brand recognition, and deliver holistic health solutions. Success hinges on speed, trust, personalization, and integrating broader wellness services into the customer experience.

### Speed is the New Service Standard

Quick commerce has spoiled us. If Q-commerce apps can deliver ice cream in 10 minutes, why can't medicines arrive in an hour when someone's running a high fever? The opportunity here is enormous. Emergency medicine delivery could command premium pricing while solving a real pain point. Imagine dark stores stocked with fever medications, pain relievers, and basic first aid supplies, ready for hyperlocal delivery.

But here's the catch: speed can't compromise safety. Prescription verification, pharmacist consultations, and quality checks still need to happen. The winners will be those who can streamline these processes without cutting corners on healthcare standards.

### Subscriptions for the Long Haul

Chronic disease patients represent a goldmine of customers, not because they're profitable to exploit, but because their needs are predictable and ongoing. A diabetic patient buying the same medications monthly for decades represents the kind of customer lifetime value that makes subscription models viable.

The current offerings are pretty basic: automated refills and bulk discounts. But imagine subscriptions that include medication adherence tracking, periodic health check-ins, dose adjustment consultations, or family-plan subscriptions managing multiple chronic conditions across the household could unlock even greater value.



## Trust Through Transparency

Building trust isn't about clever marketing; it's about making the invisible visible. QR codes that let customers verify medicine authenticity in real-time. Supply chain tracking shows exactly where their medication came from and when it was manufactured. Proactive communication about any issues before customers must ask.

Drawing inspiration from successful digital platforms that have built consumer confidence through privacy-by-design architecture, e-pharmacies could implement systems where health data remains encrypted and accessible only to patients and authorized healthcare providers. Granular privacy controls allowing customers to manage data storage, retention, and access permissions could address growing concerns about data privacy. Ipsos Global Trends Survey 2024 shows that 49% Indians (urban masses) are concerned about "how information collected about me when I go online is being used by companies" (in general, not only e-pharmacy).

## Beyond Just Medicine Delivery

The smart money isn't betting on pure-play medicine delivery. It's on platforms that become health partners, handling prescriptions, booking lab tests, enabling doctor consultations, and maintaining health records. Not because it sounds good on a pitch deck, but because healthcare is inherently interconnected.

When someone orders diabetes medication monthly, they're probably also due for HbA1c tests, might need dietary advice, and could benefit from blood pressure monitoring. The platforms that can connect these dots will build deeper relationships and higher customer lifetime values. Features like personalized recommendations, refill reminders, and educational content based on user order history help build better connections with consumers, showcasing a "partner in their health journey" approach.



## Consumer Understanding and Omnichannel Approach

An in-depth understanding of shopper needs and motivations, triggers and barriers to purchase, becomes crucial in the omnichannel context. Understanding the various moments that trigger online purchase (last-minute travel medicines, need for immediate relief, availability compared to offline pharmacies) and ensuring stock availability and promotional offers accordingly is important.

The expansion beyond medicines into overall wellness and self-care products (including personal care) creates additional touchpoints. E-pharmacies are expanding into wellness products and medical equipment, creating comprehensive health and wellness ecosystems that brands can effectively utilize.

### Direct-to-Consumer Opportunities

Traditionally, pharmaceutical marketing in India has been physician focused. E-pharmacies facilitate direct communication with end consumers, allowing brands to build recognition and loyalty directly with patients keeping regulatory guidelines in mind.

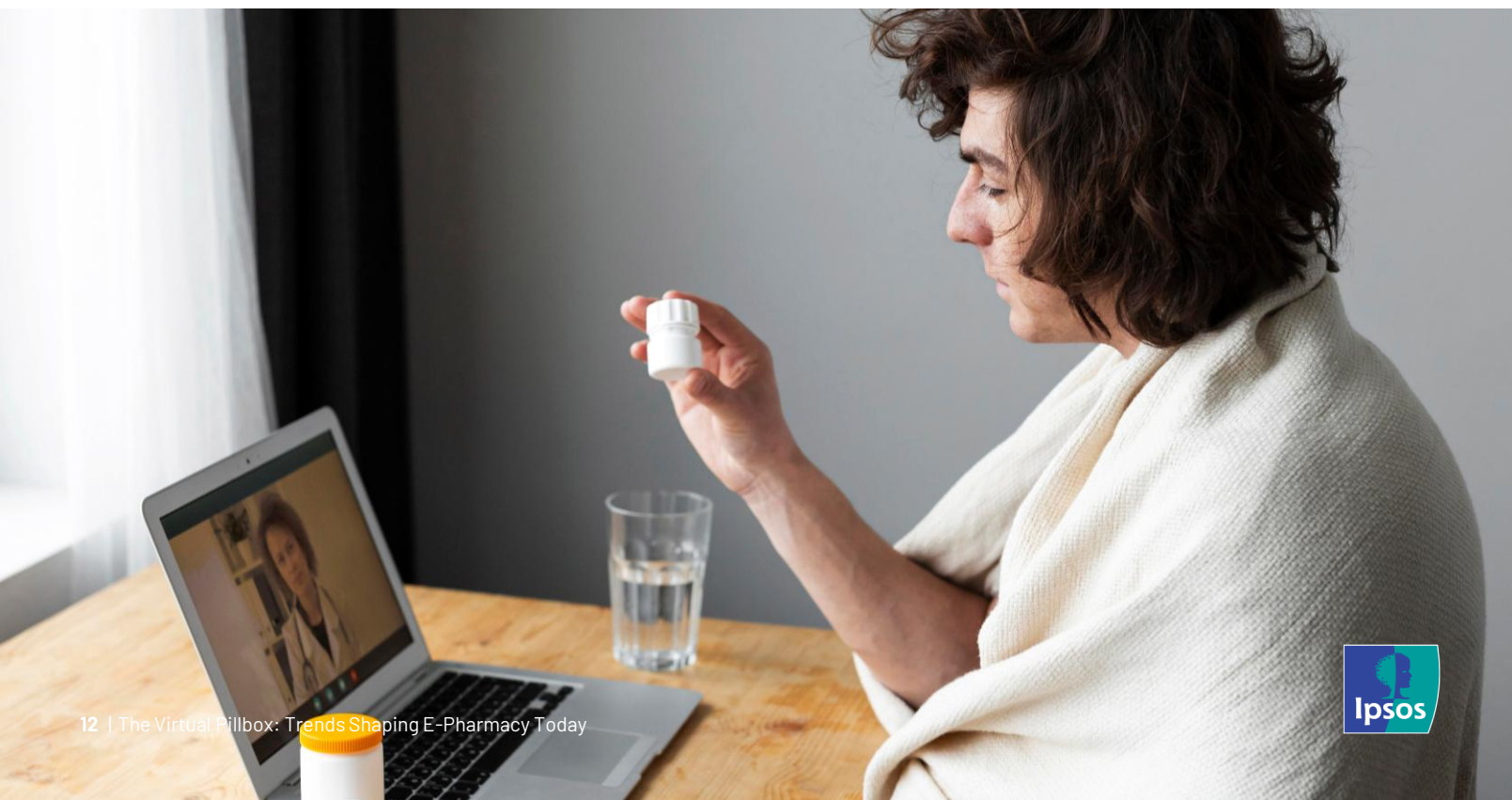
Brands can create valuable educational content

such as articles and videos about health conditions, medication side effects, and wellness tips. This helps build trust and positions brands as authorities in their therapeutic spaces. Customer reviews become particularly valuable, as positive feedback can significantly influence purchasing decisions.

### Wider Reach

While metropolitan areas currently dominate the market, there is a growing focus on expanding into smaller cities and rural areas. The increased internet and smartphone penetration is making e-pharmacies more accessible to a broader audience.

Additionally, Ipsos Shopper survey shows an over indexing in the online purchase of medicines among Gen X online shoppers (as compared to Gen Z and Millennial online shoppers). Hence it becomes imperative for marketers to address the digital needs of Gen X and even Silvers (60 yrs +) to explore how to effectively tap the opportunity the channel has to offer. This will require focus on intuitive app interface and ease of navigation, especially among the elderly (Also Read - [Dear Brands, Are you Silver Savvy](#)).



## The Realistic View Forward

Here's what's likely to happen: the market will keep growing, but not uniformly. Metro markets will see faster adoption driven by convenience and savings. Quick delivery will become table stakes for urban areas. Chronic care subscriptions will mature into sophisticated health management programs.

The trust issue will gradually be resolved through a combination of regulation, technology (blockchain supply chain tracking, AI-powered authenticity verification), and simple accumulated positive experiences. But it'll take time, probably years, not months.

The big question isn't whether e-pharmacies will grow, they will. It's who will build sustainable businesses that actually improve healthcare

access rather than just digitalizing existing inefficiencies. The winners will be those who remember that behind every prescription is a person who just wants to get better, and everything else should serve that fundamental human need.

That might sound idealistic, but in healthcare, trust and genuine value creation tend to be the same thing. And in a market this large and underserved, there's room for everyone who can deliver both. The continued integration of technology and expansion into new services will likely fuel growth for years to come, but success will require focus on building trusted, sustainable healthcare relationships that extend far beyond transactional medicine delivery.





## For further reading:

- Clicking into the Future: Trends driving India's Online Shopping Surge ([Read here](#))
- Ipsos Global Trends 2024 – India Edition ([Read here](#))
- Dear Brands, Are you Silver Savvy? ([Read here](#))
- What the future : Wellness ([Read here](#))
- Emerging trends in online pharmacies: What 2025 could hold for digital healthcare - [The Economic Times](#)

## How can Ipsos help?

**Ipsos Healthcare** team helps clients build successful brands by offering a uniquely integrated combination of therapeutic area knowledge, real-world evidence, and innovative research approach- understanding behavior of patients, physicians, and other stakeholders in the healthcare industry.

**Ipsos Shoppers** Experts can help understand shopper's online and offline purchase journey, including path to purchase, omnichannel purchase behaviour, impact of touchpoints in the purchase journey etc.

**Ipsos Total Access** –Designed specifically for India, to tackle the unique challenges of the Indian market realities, with 5 modes of accessing consumers – Mobile, Online, Hybrid, Multi-mode, and Offline. Ipsos Consumer Voice offers anytime, anywhere access to consumers in as quickly as 6 hours through its 3.5 million+ validated panel of consumers.

Our rapid and validated end-to-end solutions can help you plan future winning strategies.



# For further information, contact the authors:

**Malavika Mani**

Executive Director – Healthcare  
Ipsos India  
[malavika.mani@ipsos.com](mailto:malavika.mani@ipsos.com)

**Shruti Patodia**

Research Director  
Ipsos India  
[shruti.patodia@ipsos.com](mailto:shruti.patodia@ipsos.com)

