THE PERFECT PILL COMPETITION

Topic: A Study On The Shift In Pharmaceutical Marketing Strategies And Brand Communications Due To Covid-19

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20/9/20

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API	Active Pharmaceutical Ingredient
CME	Continuing Medical Education
FDA	Food and Drug Administration
GP	General Physician
HCP	Healthcare Professional
HLS	Health and Lifesciences
IMI	Innovative Medicines Initiative
KOL	Key Opinion Leader
RPA	Robotic Process Automation
UX	User Experience

EXECUTIVE SUMMARY

a. Area of focus

The healthcare system has been witnessing uncertainties since the commencement of the nation-wide lockdown due to the global COVID-19 pandemic. It is changing the dynamics between doctors, patients, and pharmaceutical companies.

For the Pharmaceutical industry, these are turbulent times since it is facing the brunt of the pandemic in the form of supply chain issues, shortage of Active Pharmaceutical Ingredient (APIs), research, and development decisions, restructuring of teams for increasing the focus on the virus. Nevertheless, the demand for pharma products is higher than ever. To aggravate their complexities the preferred face to face communication channel has taken a major hit. The fear of infection is prohibiting doctors from physically engaging with the salesforce.

The virus has tested the digital preparedness of the pharmaceutical industry as most of the business process has to be transformed. Marketing and sales being the backbone of this industry, there is an urgent need to redesign the traditional models of communication with Healthcare Professionals (HCPs)

Industry players have leveraged technology to engage with their stakeholders. Several platforms and modes of communication have been adopted to maintain relations with the customer base and maintain their brand's recall. Information is being consumed by the HCPs through mechanisms like banners on social media platforms, webinars, informative e-mails, video calling tools, online Continuing Medical Education sessions, etc.

To benefit the healthcare delivery, it is imperative to understand the challenges that the HCPs are facing in receiving information from Pharma companies. Mapping their opinions on the content that is being sent by Pharma companies and their preferred type of content would enable the companies to expand their reach and help the doctors in treating their patients effectively.

Hence, an insight mining study was carried out among 26 HCPs from various specialties and years of experience. The focus was on understanding their views on the digital shift in pharmaceutical marketing strategies.

To derive stronger insights, it was important to connect with Pharmaceutical marketing/product managers who are the key decision-makers of their brands. Their views on the changing customer behaviours and digital transformation of the industry would provide a better understanding of the current scenario.

b. Project Timelines

The overall project took over 1 week for gathering primary and secondary data and 1 week for data analysis and reporting. Each task was allotted a specific number of days. This comprised of gathering necessary data for understanding the current workings of the Pharmaceutical industry took weeks and was followed by identifying industry drivers and primary stakeholders.

The following week was spent in setting the study objectives, research methodology, and designing the questionnaire for the 2 primary stakeholders (HCPs and Pharma Marketing/Product managers)

It took a week to conduct telephonic interviews with 10 HCPs based on their convenient time. The rest 16 HCPs and 7 Pharma Managers participated in the study through online survey forms. Gathering data from the HCPs took about 2 days overall.

This was followed by analysis of the data gathered and comprehending the HCPs and Pharma Managers' viewpoints and providing recommendations based on the same.

c. Major Findings

The major findings from this study are based on the responses by the HCPs and Pharma Managers

i. HCPs:

- HCPs are currently avoiding face to face interactions with pharma companies due to the pandemic and increased risk of infection
- Hence, companies are currently reaching out to HCPs through video calling applications, content on their website and social media pages, webinars, product description e-mails, phone calls, text messages, etc.
- Pharma companies have been focussing and utilizing their resources to send information on COVID-19 and their contribution towards the pandemic. Due to this, the HCPs are facing a missing link while trying to get their hands on information regarding upcoming therapeutics for various diseases and the latest breakthroughs
- Most HCPS are feeling overwhelmed due to the information overload and complain about repetitive content being circulated through different platforms
- HCPs are currently experiencing a lack of personalized and detailed content
- Since one is accessible at any time through digital mediums, some HCPs felt that there was an intrusion in their private time

ii. Pharmaceutical Marketing/Product Managers

- Changes in customer (HCPs) behaviour was recorded through the responses by Pharma managers

- Due to the current uncertainty, the touchpoints with doctors have changed
- There has been a surge in the usage of digital platforms to conduct CMEs, product launches and for providing prescription and treatment details
- Inhibitions around the adoption of digital tools are reducing and doctors are adapting to the changing trends
- Consumers are extremely aware of the alternatives in the market and do a thorough check of the pricing and the value offered by the alternatives

d. Conclusions

From the above findings, it can be said that digitization in pharma marketing and sales is here to stay. Since the conventional communication channel is disturbed, pharma companies are going all out to connect with HCPs and sell their products through most existing platforms. Despite the efforts, HCPs are not extremely satisfied by the type of communication that they are receiving and believe that limited value is being added to their practice. Hence, stronger targeting strategies and precise content are needed.

The lessons from COVID-19, if viewed as an opportunity, can change the global footprint of Indian Pharmaceutical companies. The reputation of these companies is on the line and the kind of service they provide to their consumers in the current phase will bring in greater value, in the years to come.

CHAPTER 1. INTRODUCTION

1.1 Background to the problem

The rapid onset of COVID-19 all over the globe has impacted every business sector. There have been significant disruptions due to travel restrictions, social distancing norms, and large-scale quarantines taking place across most nations. Changes in supply chains, consumer behaviour, buying patterns, and react to the market are knocking companies off balance.

Similarly, healthcare systems around the world are facing the effects of COVID-19 at different degrees: The pandemic is affecting different healthcare providers (HCPs) differently. Certain HCPs like Critical Care specialists and Immunologists are directly facing the brunt of the virus whereas, HCPs like Oncologists, Psychiatrists, and Primary Care providers are struggling to provide adequate care to their existing and new patients. Hospitals are experiencing added pressures due to the spikes in care. There is a shift in focus and this leaves some with less time and fewer resources to handle patients with conditions apart from COVID-19 symptoms. New patients with chronic diseases may not receive adequate care and existing patients may delay their routine check-ups. These barriers are leading to a change in the HCPs' requirements from Health and Lifesciences (HLS) companies.

HLS companies heavily rely on face to face engagement strategies to introduce their services and educate the HCPs regarding their products. With the lockdown implications and social distancing norms, there is restricted access to these HCPs and this can affect Pharma sales and the type of care delivered by the HCPs. There is an immediate need to change the way HLS companies, especially Pharmaceutical firms, interact with HCPs and patients since it is unclear whether the traditional way to conduct sales and provide information will continue to post this pandemic. The future positioning of these organizations depends on these changes. These organizations need to re-evaluate their customer connection strategies and restructure their resources to continue building value for their brands. Hence, many companies are relying on virtual means of communication to engage with HCPs. However, not all HLS companies are equipped to make this shift. There is a wide range of variance when it comes to digital maturity and the level of preparedness to reimagine digital strategies may be very country-specific as well.

Customer acceptance plays a vital role in redesigning marketing strategies. Due to the paucity of time and possible lack of certain resources HCPs may not be able to fish for the information they require on digital platforms. HLS companies need to keep these factors in mind before initiating engagement and design new/utilize existing platforms accordingly. With varying needs and demands of the HCPs, HLS companies will have to widen their presence and be available at their beck and call. Lastly, the information that is provided to the HCPs by HLS companies should add value to their practice and benefit healthcare at large. Hence, timely assessment of the type of content and its acceptance is imperative.

CHAPTER 2. LITERATURE REVIEW

2.1 Overview

The Indian Pharmaceutical Industry, which is a manufacturer of 60% of vaccines globally[1] and is the world's 3rd largest drug producer by volume, is facing some operational challenges and is experiencing a shift in business processes during these unprecedented times.

The key challenges that the industry is currently facing are:

a. Supply Chain Disruptions:

- India is dependent on China for around 70% of the APIs that are used in pharmaceutical manufacturing[2]
- API production in China itself has slipped by 10-20% during the initial days of COVID-19[3]
- According to the data compiled by India's drug regulatory authority, 57 APIs of antibiotics, vitamins, hormones, and steroids could go out of stock in case the lockdown period prolongs in China[4]
- Transport of drugs within states i.e. from manufacturing plants to the distributors and from distributors to retailers is a major challenge faced by pharmaceutical companies currently

b. Delayed Product Launches

- There is a shift in the focus of research and development and manufacturing of drugs since companies are using ample resources to develop vaccinations and therapeutics for COVID-19
- In all, COVID-19 pandemic has affected 62 events globally[5] (trade shows, conferences, and events in the pharma and life science industries)

c. Lack of access to physicians

- With the rapid spread of the virus, Pharma sales representatives cannot visit hospitals and clinics
- There has been an impact on the circuits of global meetings where marketers usually unveil research data and new products to various Key Opinion Leaders (KOLs) Pharmaceutical companies resort to, "In-clinic" marketing strategies for influencing doctors and use medical forums to introduce their new product

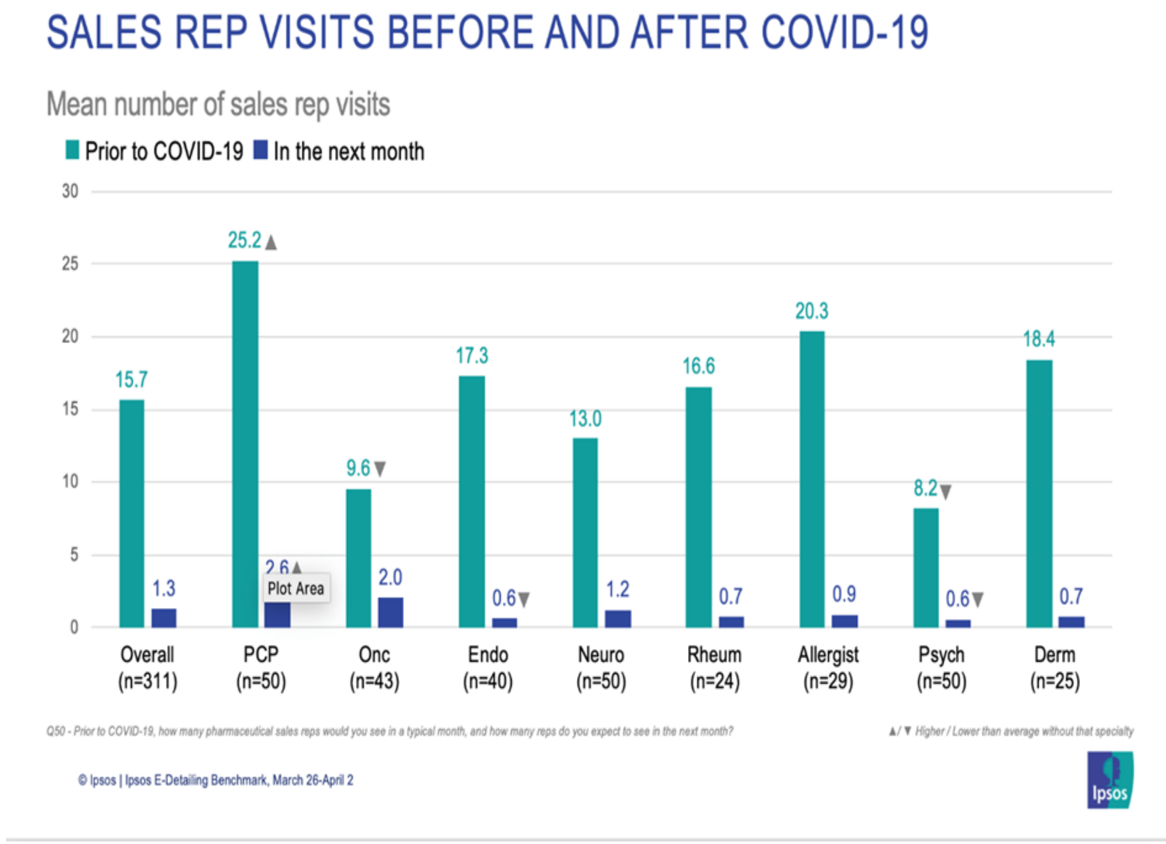

Figure 1: Sales Rep visits before and after COVID-19: A study conducted by Ipsos

- Figure 1[6] is an excerpt from Ipsos's study on, 'COVID-19 forcing Pharma sector to adopt new physician interaction models.' It shows the decline in the number of sales representatives visiting HCPs and performs a comparison with the pre-COVID-19 era.

d. Spread of infection across employees working on the field and in the manufacturing plants

- Cadila Pharmaceuticals came into light because 26 of its employees from the Formulations Unit at Ahmedabad tested positive for Coronavirus[7]

e. Remote Work and Cybersecurity concerns

- Lowered productivity as a collaboration among team members may not be as effective
- Unsecured networks may impose a threat to company-specific confidential documents and sensitive data

2.2 Plan of Action for pharma companies to shift gears in the face of the pandemic

The pandemic has devastating implications but for Pharma companies, this pandemic brings along some opportunities and the need of the hour is to respond, recover, and thrive. Following are the key pointers that are gaining the attention of pharma companies:

a. Tackling Supply Chain Challenges:

- The dependency of Indian Pharma companies on APIs from China is a matter of concern. This is an indication of reviewing the internal API sector. India can boast of the availability of a large labour pool hence, pharma companies can aim at promoting manufacturing of critical elements and aim at gaining the attention of international pharma markets

b. Interaction with KOLs

- Re-evaluation of existing marketing strategies while implementing and leveraging technological solutions for engagement is of utmost importance
- These changes are a deciding factor for the company's future as there is a possibility of the current environment of being the new normal
- Skill development sessions for employees is a mandate to smoothen the integration of technologies in the business system

c. Employee Safety

- There is an accentuated focus on the safety of the employees in the current scenario
- Educating the employees on COVID-19 symptoms, safety protocols, social distancing in manufacturing plants, through audio-visual mechanisms
- Conducting periodic medical check-ups/scanning at entry points, tie-ups with HCPs for teleconsultations if required, provide safety gears like masks and face shields, sanitizers and other personal hygiene products to on-site employees

d. Overcoming remote working and cybersecurity woes:

- Formulating and implementing a strict policy for VPN access and continuous security analysis of communication channels to identify potential threats associated will have to be done

e. Collaborative Efforts

Global Pharma companies are ensuring collaboration of resources to fasten the research and development of the vaccine and therapeutics for the virus and are forgoing normal approaches to pricing and drug allocation. For example,

- AbbVie waived all IPRs worldwide on its drug Kaletra (a combination of 2 antivirals to treat HIV)
- The diabetic population is being offered support by Eli Lilly by encouraging them to call the Lily Diabetics Solution Centre, where they can seek advice regarding prescriptions
- 3 Million Resochin (Chloroquine) tablets have been donated by Bayer to the United States Government for use in COVID-19 cases

- Adaptive Biotechnologies (Seattle, USA) and Amgen are partnering to combine expertise to discover and develop fully human neutralizing antibodies targeting SARS-CoV-2 to potentially prevent and treat COVID-19
- Novartis is evaluating existing products to understand if any could be utilized beyond their approved indications in response to the pandemic. It has announced a 440 person study in the US to determine if its malaria drug can effectively treat COVID-19
- Cipla and Jubilant Lifesciences have signed a licensing deal with US-based Gilead science for manufacturing Remdesivir, a drug which has been identified as a potential therapy for COVID-19
- Randox in collaboration with Bosch Healthcare has been developing testing kits and their system tests 324 samples in 8 hours
- AstraZeneca + GlaxoSmithKline have been working hand in hand to develop new diagnostic lines for the testing of the virus
- Takeda is partnering with public entities and certain pharmaceutical companies through the Innovative Medicines Initiative (IMI) in Europe to utilize collective expertise in the hope of developing advanced diagnostics for COVID-19 as well as inhibitors to help prevent future outbreaks
- The Food and Drug Administration (FDA) issued an Emergency Use Authorization for Roche’s diagnostic kit, advancing coronavirus testing to meet urgent medical needs
- AstraZeneca donated nine million face masks to support healthcare workers around the world

2.3 Navigating Pharma Marketing and Sales in the COVID-19 Era

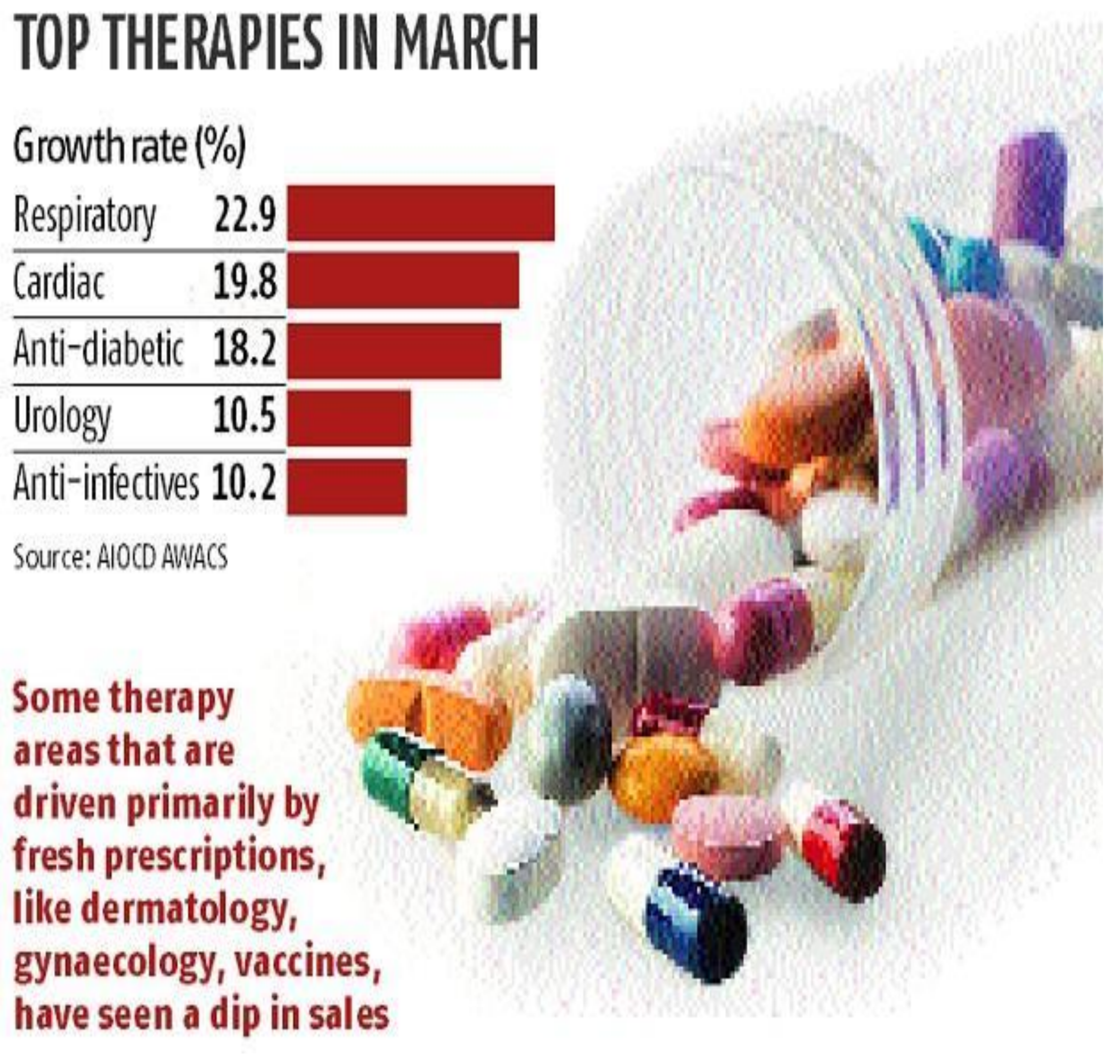

Figure 2: Top therapies in March

- Figure 2 elaborates on the fact that despite the nation-wide lockdown that has disrupted the distribution of drugs across the country, pharma sales in March registered an 8.9% growth[9](cardio-diabetic and respiratory segments have seen a robust growth)
- However, therapy areas that are mainly fresh prescription driven like dermatology, gynecology, vaccines, etc have seen a drop in sales
- Not all HCPs are fighting the virus on the frontlines. These HCPs are striving hard to maintain the semblance of normalcy in the uncertain world
- Beyond the unknowns of the pandemic, they are facing monumental changes in the way in which they practice medicine: Reductions in support staff, decreased patient load, adapting to telemedicine platforms, challenges in sourcing supplies and medications as well as the patterns of interaction with pharmaceutical companies and sales representatives

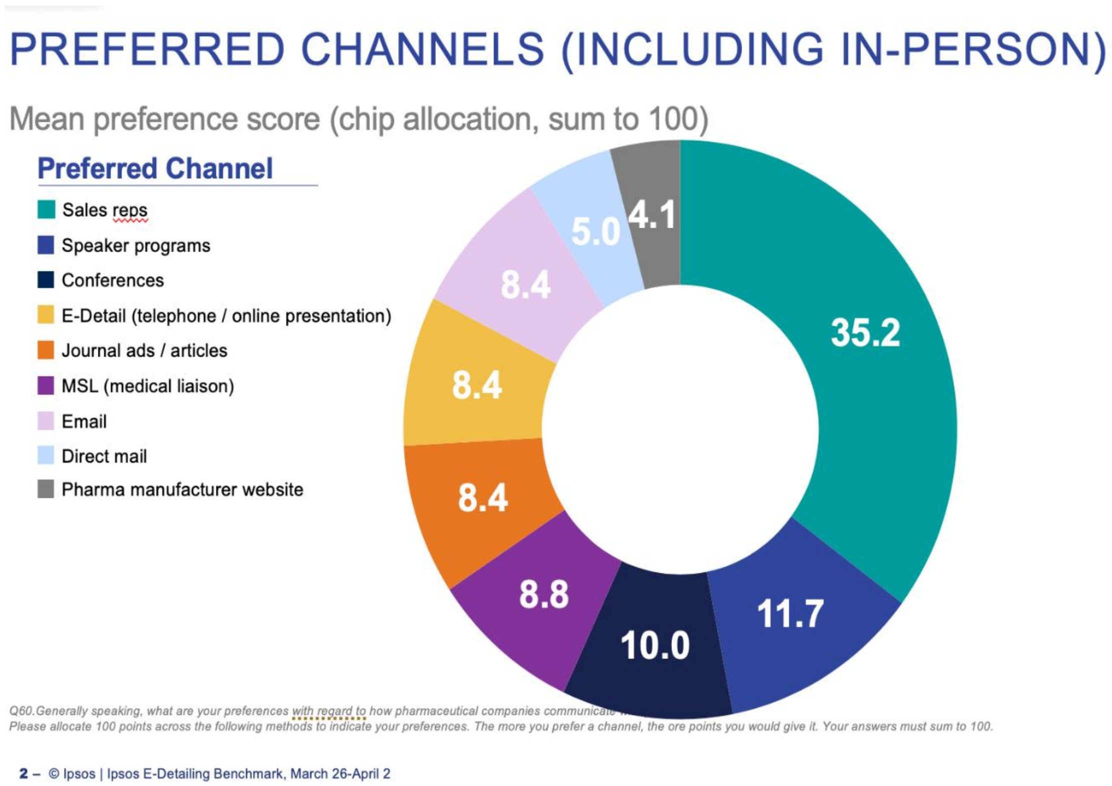

Figure 3: HCPs' Preferred Channels of Communication

- Figure 3 is an image from a study by Ipsos's Healthcare team on the impact of COVID-19 on HCP practices[6]. This image throws light on the fact that most preferred pharma communication channels are predominantly in-person
- Fighting COVID-19 is the priority, but adjusting to a new reality is a close second

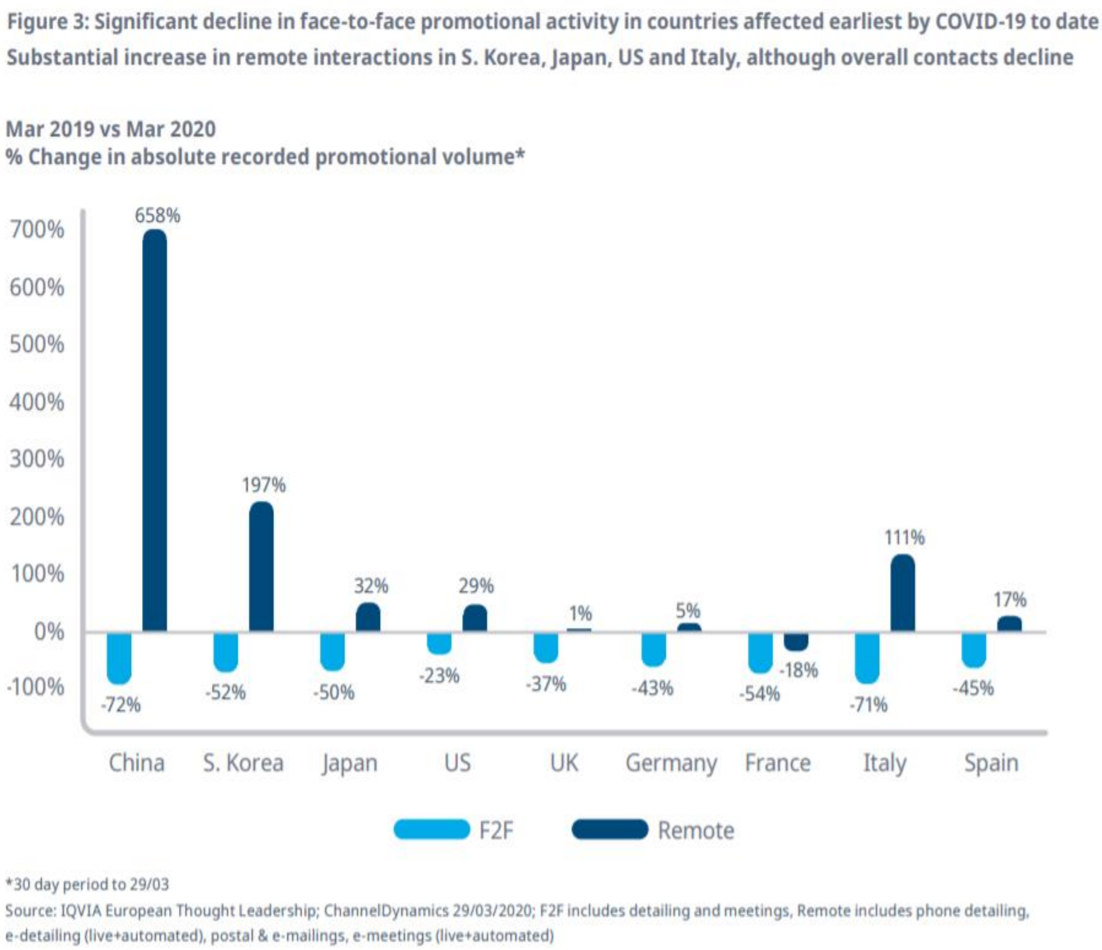

Figure 4: Significant decline in face to face promotional activity in countries affected earliest by COVID-19 and substantial increase of remote interaction

- Figure 4 depicts the decline in face to face promotional activities in countries earliest affected by COVID-19[10]. These countries include China, South Korea, Japan, the US, UK, Germany, France Italy, and Spain. China and Italy showed a similar decline in the face to face interactions between HCPs and Pharma sales reps. China recorded a surge in the adoption of remote communication platforms followed by South Korea
- Hence, the current situation is an opportunity to innovate with remote communication tools to maintain effective engagement between employees, managers, prospects and existing customers, leading to a 'Digital Reset'
- According to a study conducted in the United States, over 60% of physicians are now digitally-driven and routinely use digital mediums for engaging with executives from the pharma industry[11]
- According to the study by Ipsos' Healthcare Team on the impact of COVID-19 on HCP practices, among the HCPs who received e-details in March, 57% of them rated the communication as. 'Highly Effective'[11]

- The same study reported three main modes of communication used by Pharma Companies: Telephonic conversations, Written Communication and Video Conferences

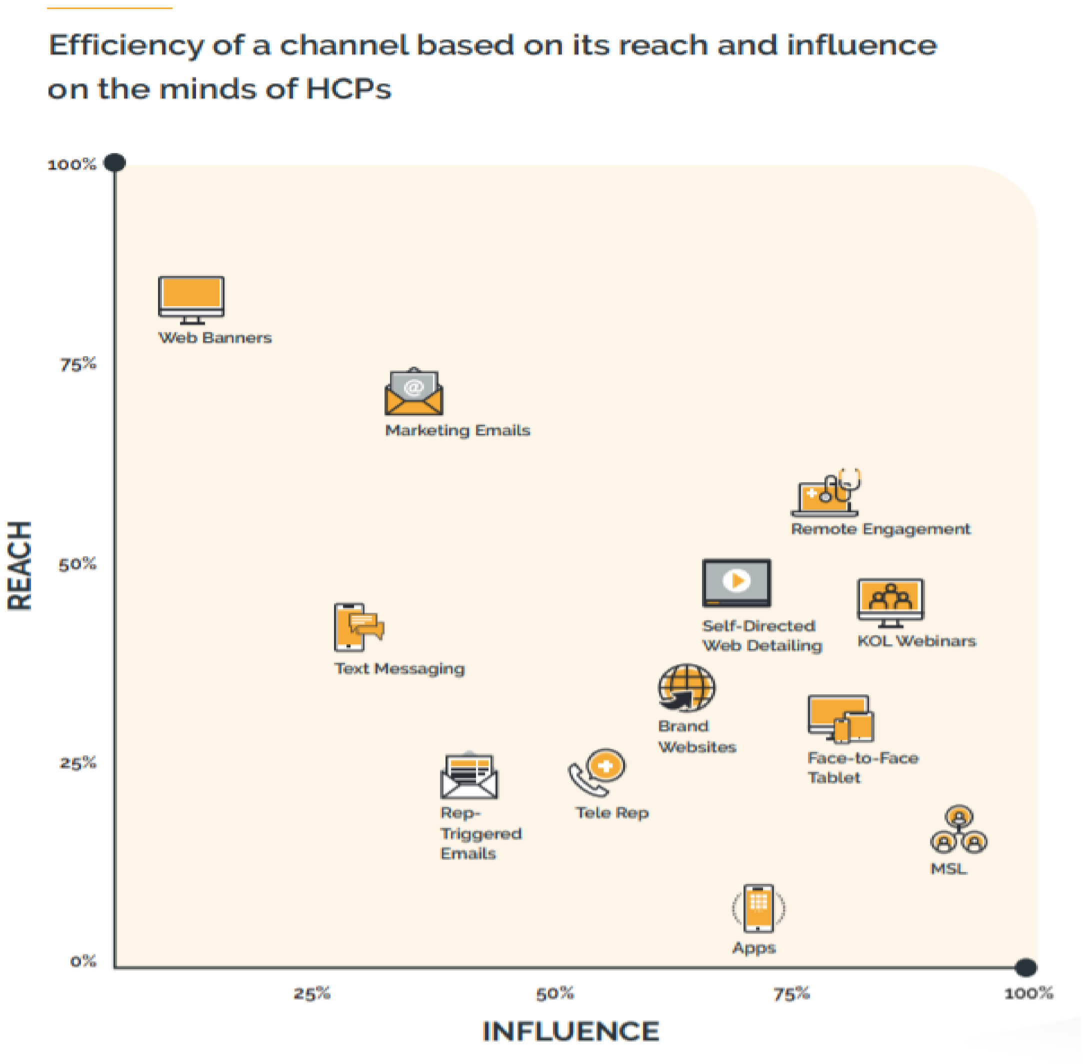

Figure 5: Efficiency of a channel based on its reach and influence on the minds of the HCPs

- According to the findings from a report by PharmaFuture (2017)[12], figure 5 lists the most effective ode of digital communication as per the HCPS. Face to face product descriptions with the help of a tablet was recorded as having a maximum influence. On the other hand, web banners on their digital portals had a higher reach followed by marketing e-mails. KOL webinars also proved to be influential. Self-directed web detailing and remote engagements were picking up although, not as influential as face to face meetings

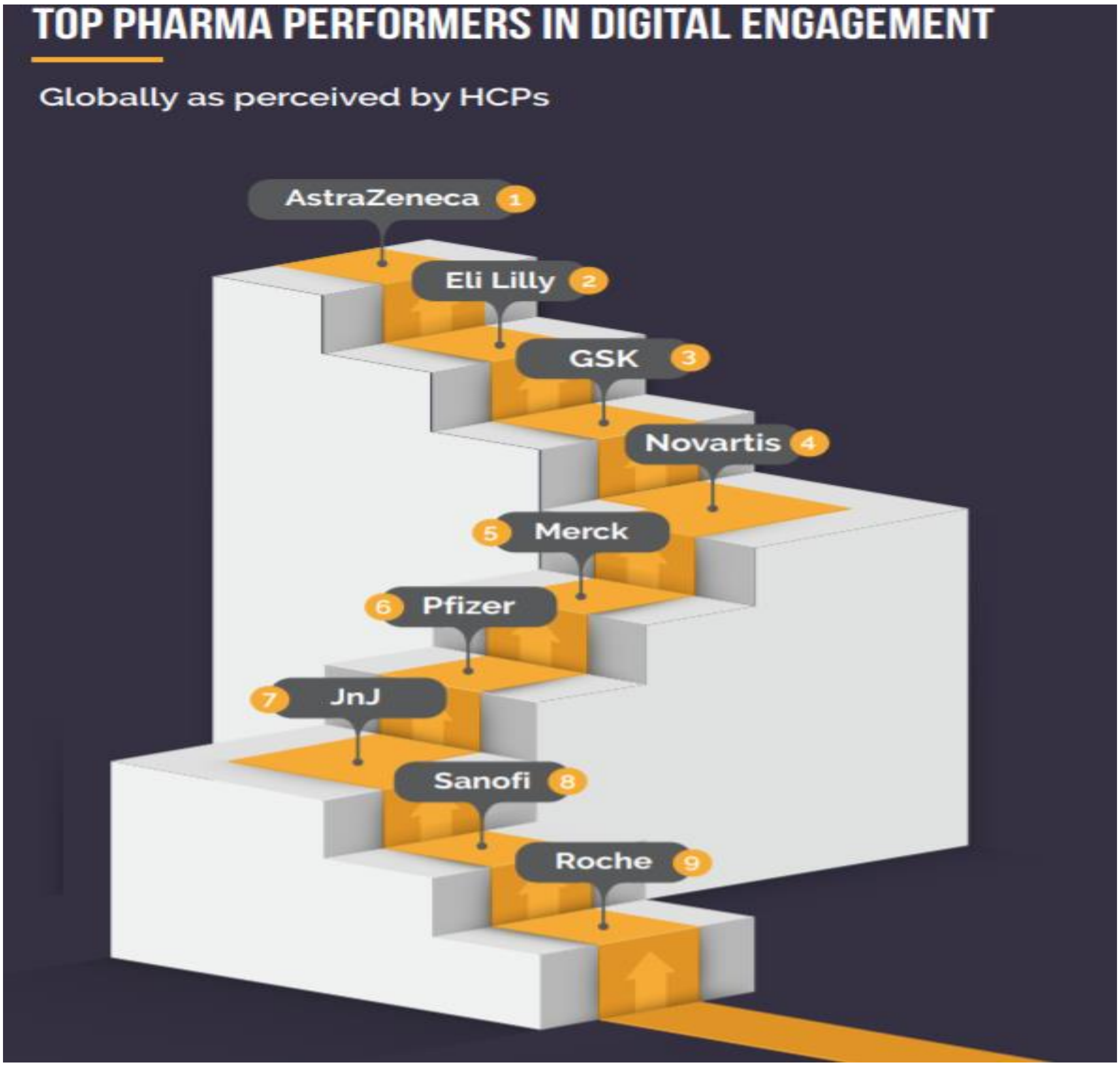

Figure 6: Top Pharma performers in digital engagement

- Figure 6 depicts the top 9 Pharma companies leading in digital engagement. AstraZeneca ranks the highest. This is reported by a study in PharmaFuture[12] (2017)
- According to a study featured in Marketing Daily titled, 'Should Pharma brands go dark, stop advertising and marketing during COVID-19 pandemic?'[11], from a customer's point of view, the pharma industry should continue to provide branded and sponsored information and should create advertisements related to their products during the pandemic. 74% agreed that it was 'Okay to do so', 36% highly agreed. Gen X showed the highest level of complete agreement to advertise at 42%, compared with 23% not to advertise. Gen Z followed with 26% in complete agreement to advertise vs. 26% not to advertise, Millennials at 31% in complete agreement to advertise and 25% not to advertise, and Boomers at 38% in complete agreement to advertise and 28% not to advertise

- For successful digital marketing campaigns, apart from using interactive platforms, it is imperative to catch the HCPs' attention keeping the following points in mind:

  i. User-friendliness: HCPs may not download the right application on their phones or browser on their computers. In case video conferencing is used, a simple click touch should be deployed to switch from a link to the video conference and screen sharing

  ii. Quality of content: HCPs would like Pharma companies to go, **"beyond-the-pills"** and to provide more patient-focus content. Pharma companies should bring additional value to the HCPs and follow **"help me helping my patient"** policy. This can be possible if the sales rep has the appropriate tools that allow remote communication and HCP profiling and tagging based on the feedback provided. Once the HCP 360° view is fed, the marketing department can **customize the content and plan activities as per the segmentation and targeting** of these HCPs. In 2018, the most commercially successful launches in the seven major country markets (which account for **almost 90% of the first five years of launch sale**s) were virtual ones, as defined by the makeup of the first year's promotional activity. Post COVID-19 launch planning should anticipate further changes in engagement with healthcare professionals, likely with not only more use of digital channels but also with a set of expectations of which channels and types of content will add value

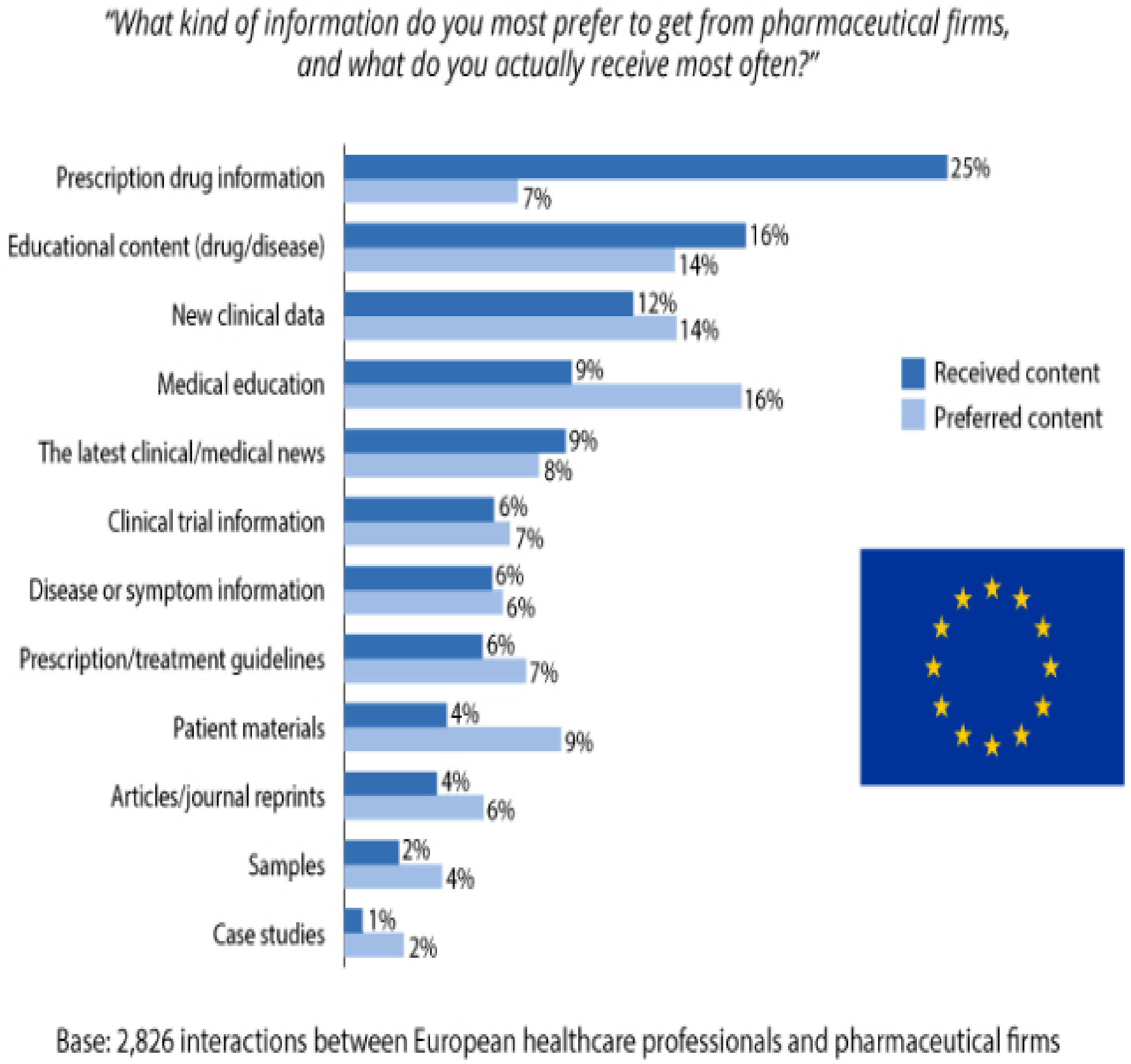

Figure 7: Information received vs information preferred (Europe)

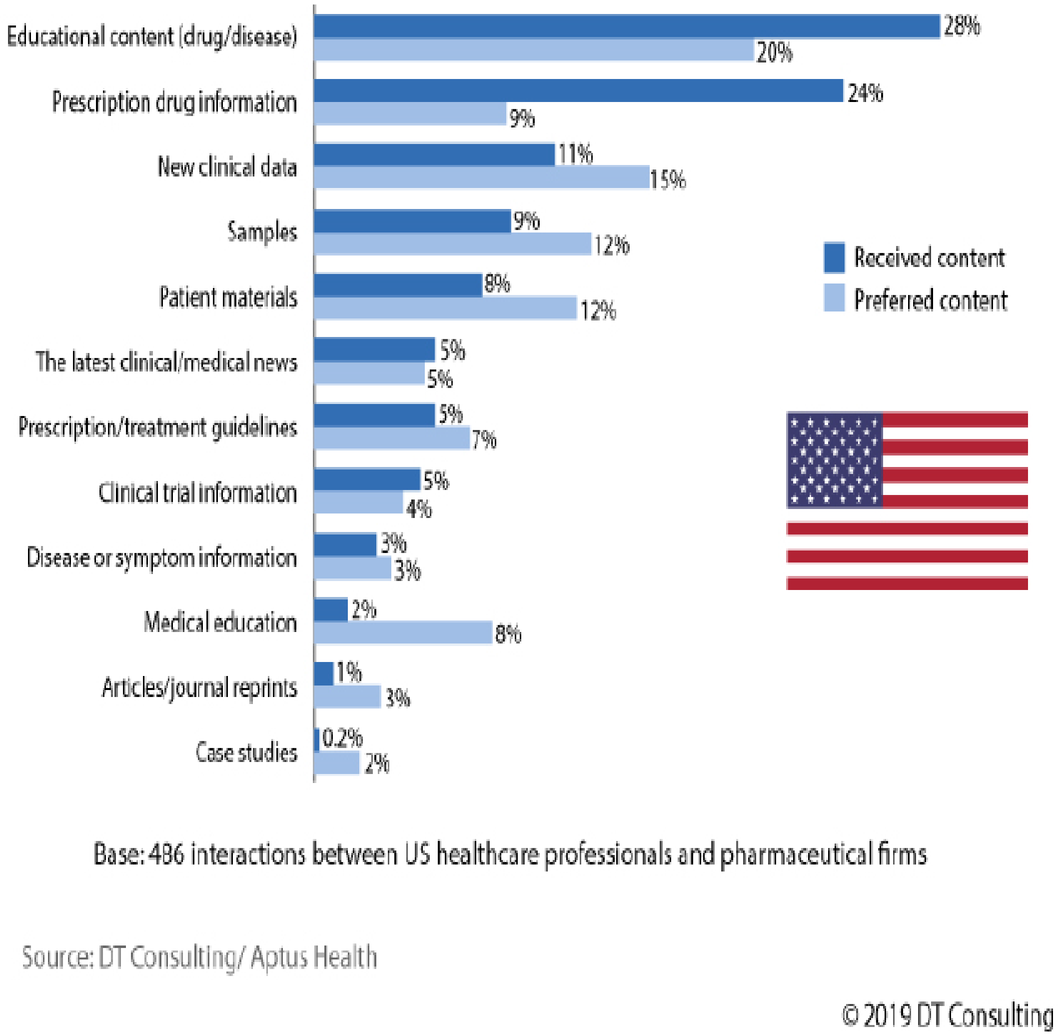

Figure 8: Information received vs information preferred (USA)

- Figures 7 and 8 throws light on the content that is received from pharmaceutical companies and the content that is preferred by HCPs. HCPs in both the geographies mentioned that they were receiving ample educational content. HCPs in Europe mentioned that they would prefer receiving Medical Education whereas HCPs in the US preferred receiving educational content[12]. The least received and preferred content in both the geographies were Case Studies
- The nature of the remote engagement healthcare professionals are seeking, and the content and support they require revolve around the following areas: protective equipment, scientific updates and information in real-time, information on symptoms, diagnosis, and drugs, centers for treatment, management of complex cases, and communications on the healthcare situation. They want information in a rapid, time-efficient format: email and WhatsApp messaging is also preferred

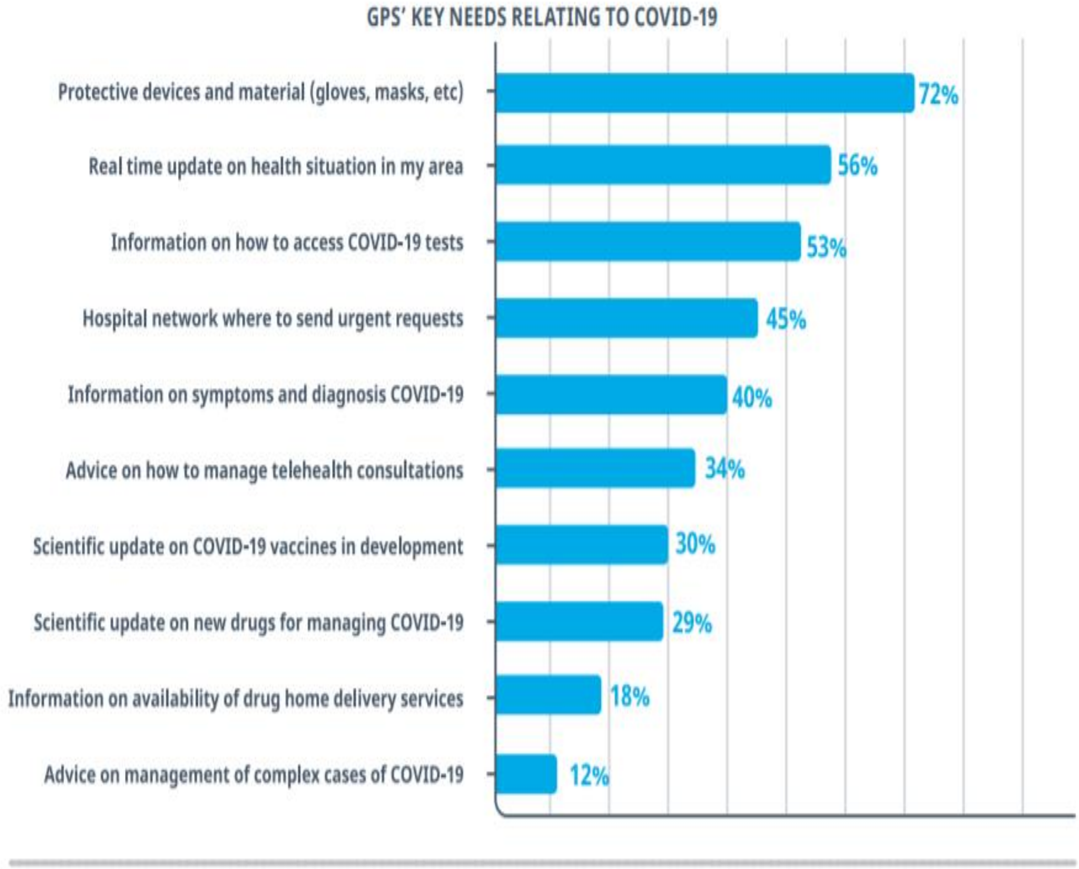

Figure 18; GPs' key needs relating to COVID-19.

Source: IQVIA Medibus, April 2020, n=119 GPs.

<u>Figure 9: GP's Key needs relating to COVID-19</u>

- Figure 9 is a snippet from a study conducted by IQVIA[12]. This chart elaborates on GP's key needs relating to the pandemic. Protective devices and material were given top priority and this was followed by a real-time update on the health situation in the GP's area and information on accessing COVID-19 tests

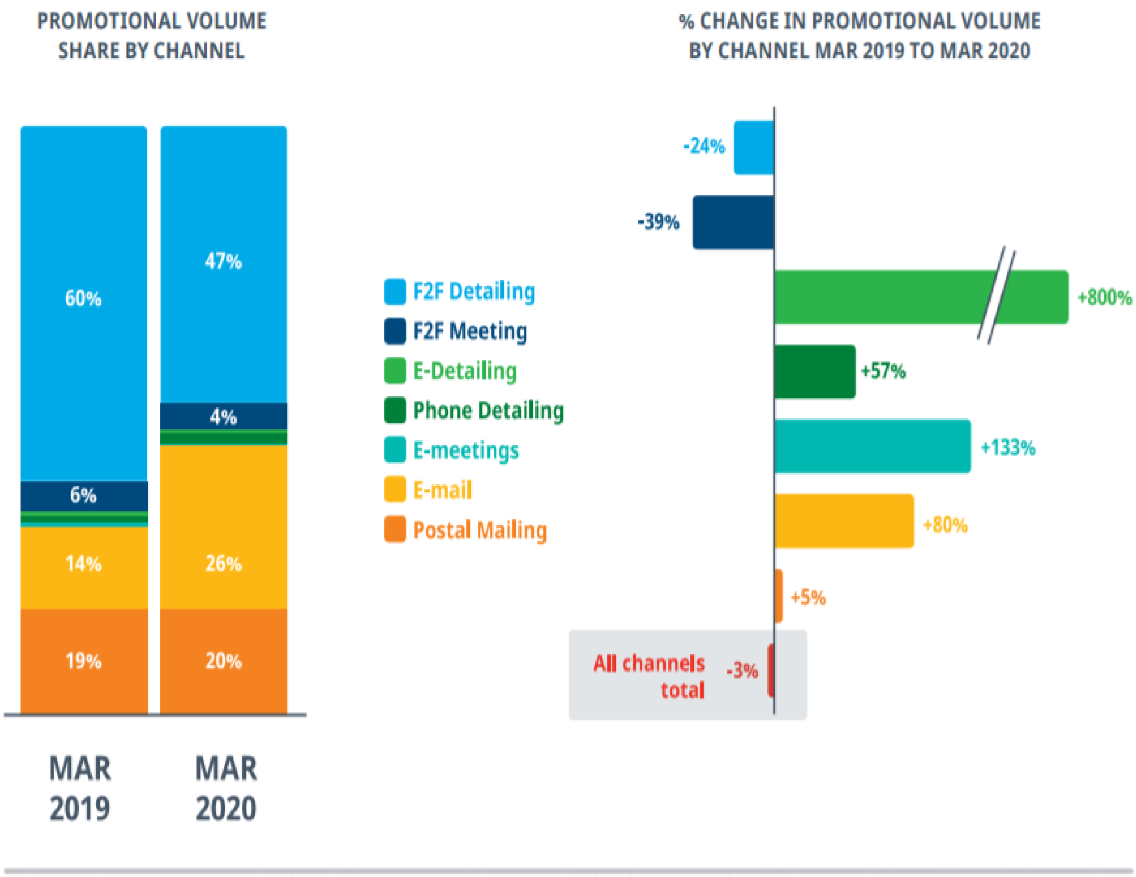

Figure 23 (a) and (b): Promotional volume share by channel and percentage change March 2020 vs March 2019.

Source: IQVIA ChannelDynamics.

<u>Figure 10: Comparison between the changes in the trends in different modes of communication in March 2019 vs March 2020</u>

- Figure 10 is a comparison between the changes in the trends in different modes of communication in March 2019 vs March 2020[12]. March 2020 records a decline in Face to face interactions and an increase in the usage of modes like e-mail marketing. There has been a decline of 24% in Face to face marketing channels from March 2019 to March 2019 and 8000% increase in e-detailing, 133% increase in connecting through digital meetings and 80% increase in the usage of marketing e-mails

<u>iii. Crisis Plugins:</u> A survey has revealed that over 85 percent of patients felt confident in their ability to take responsibility for their health and knew how to work with online resources. Marketers/brand managers, hence, need to learn the art of crisis plugins, since there is a possibility of getting consumer updates daily for help or distress. This can act as an opportunity to build on and strengthen the brand's image. Organizations in the pharmaceutical industry are taking things one day at a time and are understanding if there are any new developments and their implications on business and life.

Reviewing developments, targets, and progress to stay in the market. This daily review with team members is needed for the industry to adapt and manage its consumer base

iv. Coordinate Campaigns across the organization: Marketers need to bear in mind that during these times, it is extremely critical to plan the content that goes out to their consumer base. They shouldn't overwhelm or crowd their customers and cause an information overload

v. Brushing up on skills: This is a brilliant opportunity for sales reps to gain product training, schedule meetings with their teams to identify overlaps in promotional campaigns, learn how to optimize customer relationships and ace other tech tools of the trade. Euris, as pharma digital solutions provider, stands as the perfect partner to answer to a new awareness about digital innovation. The modular approach, allows pharma companies to pick the missing link of their digital strategies without changing the complete IT environment already in use. Through salesforce effectiveness tools, marketing, and customer-centric solutions, Euris support the Life Sciences industry to innovate with confidence without technical constraints.

CHAPTER 3: PRIMARY RESEARCH

Aim

The aim of conducting this primary research was to understand Indian HCPs and Pharma marketing/product managers' perceptions regarding the recent shift in the marketing strategies and changing brand communications due to the global pandemic.

Objectives:

i. Study the issues faced by HCPs (if any) due to the COVID-19 pandemic
ii. Capture the HCPs' requirements in terms of the content and information they wish to receive from the Pharmaceutical companies
iii. Enlist specific marketing campaigns that they liked/remember
iv. Understand their perception and acceptability of the recently adopted marketing initiatives
v. Record the digital methods of communication currently being used by Pharma marketing/product managers
vi. Understand the credibility of digital communication from pharma marketing/production managers

CHAPTER 4: DATA ANALYSIS

The primary data was obtained by conducting interviews of two stakeholders i.e. HCPs and Pharmaceutical Marketing/Product Managers. 26 HCPs participated in this survey. Owing to the difficulty in physically meeting these primary stakeholders, 10 out of 26 HCPs were interviewed via telephonic conversations and the response of the rest was recorded through an online survey form. This comprised of HCPs with varying years of experience and specialties like General Physicians, Resident doctors, General Surgeons, Anaesthesiologists, Ophthalmologists, Obstetrician & Gynaecologists, Pathologists, Paediatricians, and Dentists. These HCPs are consultants at private/public/charitable hospitals and certain HCPs practice at private clinics.

Pharma marketing/Product managers were interviewed through an online survey form. Seven respondents participated in this survey and they are employees of leading pharma companies like J.B. Pharmaceuticals, Cipla, Troikaa, Indiabulls Pharmaceuticals, Mylan, Jassen Pharma, and Sanofi.

The responses were analyzed through certain parameters. Insights were gathered based on the stakeholders' responses and pain points. Some findings of the study are elaborated through pie charts, bar graphs, and clustered bar graphs. Findings from open-ended questions are listed and quoted. Recommendations are based on the insights that got highlighted through the analysis of the primary data.

Stakeholder 1: HCPs

Sample Profile:

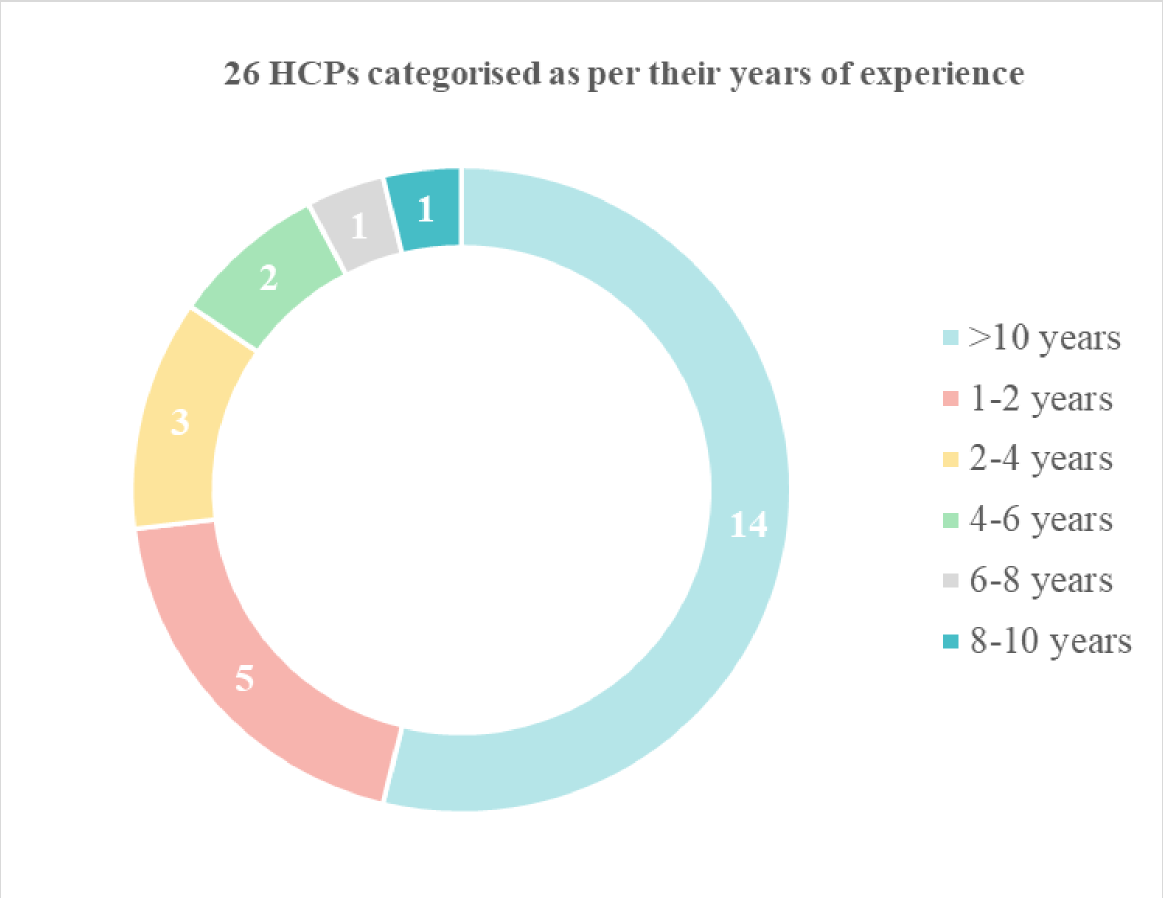

Figure 11: 26 HCPs categorized as per their years of experience

Figure 1 shows the distribution of HCPs based on their years of experience. 14 out of 26 participants had a work experience of more than 10 years. Five out of these 26 HCPs have a year or two of experience. Three HCPs were belonging to the bracket of 2-4 years of work experience and 2 HCPs in the 4-6 years bracket.

Theme 1: Challenges faced by HCPs in receiving information from Pharmaceutical companies due to COVID-19

The very first observation for conducting this research was to understand the challenges faced by HCPs about communication with pharmaceutical companies due to COVID-19. Out of the total participants, very few suggested that they are not witnessing any issues despite the lockdown regulations and changing communication strategies. Majority of the participants were facing issues like lack of personalized and detailed information, incomplete and ineffective communication. Some of the responses from the participants regarding the same were:

"No detailed communication possible and difficult to contact them about whatever is needed"(P-2)

"Latest data on breakthroughs lost due to the focus on COVID-19" (P-3)

"Remotely the flow of information is not complete. I would like for there to be reps coming to my office and explaining the product to me" (P-14)

"Overload of information" (P-20)

Theme 2: Kind of information HCPs are currently receiving from Pharmaceutical companies through digital platforms

Majority of the participants responded that pharma companies are providing them with information regarding the COVID-19 pandemic and its contribution to the same. This was followed by information on patient management during the pandemic.

Theme 3: Type of information HCPs would prefer receiving from pharma companies

Majority of the HCPs responded that they would prefer receiving more content on the latest clinical updates, updates on clinical trials, and educational content on drugs and diseases as compared to the current overload of content on the COVID-19 pandemic.

Theme 4: Mode of engagement adopted by Pharmaceutical companies due to COVID-19 pandemic

Most HCPs responded that they are receiving content through web banners on the company's social media platforms. According to the respondents, pharma companies are also resorting to conducting telephonic conversations, KOL webinars, and bulk marketing e-mails as a medium of communication.

Theme 5: **Mode of engagement preferred by the HCPs**

HCPs responded that they would prefer receiving information in the form of text messages and content on the company's websites followed by web banners on social media platforms. Marketing e-mails and video calls were the least preferred.

Theme 6: Understanding the credibility of digital engagement platforms

To understand the credibility of the digital engagement platforms, HCPs views on the pros and cons of digital engagement were recorded

Pros

"Flexibility for me to watch/read whenever I want" (P-3)

"Can interact with pharma reps within the comforts of clinic/home" (P-7)

"They reach a wide audience, and they can be mobilized to bring industry experts and specialists together to assess the present situation, in the form of webinars and Zoom calls" (P-17)

"Less intrusive. Interaction can be deferred" (P-21)

"Helps on maintain the social distancing regulations" (P-26)

Cons

"May go unnoticed. Webinars are usually not available afterward. Registration guidelines for pharma webinars are too stringent. It is impossible to register for some company webinars as there are technical problems" (P-5)

"Misinformation can also spread very quickly" (P-8)

"Repetitive information from multiple sources" (P-11)

"Some health care professional are concerned that unfiltered medical records or clinicians notes may confuse patients who are not necessarily well versed in health care terminology" (P-16)

"I am more likely to ignore a general mass mail than a personal visit from a pharma rep that I know" (P-22)

"Personal touch and compassion missing" (P-25)

Theme 7: Digital campaigns that have added value to the HCPs' practice in the past

Some HCPs responded that the digital engagement conducted by Glenmark is currently impacting their practice and has helped in improving patient care.

"Glenmark released some interesting posters and data that I was able to use in patient education" (P-4)

"Campaign: Information received on COVID 19 by Glenmark" (P-10)

"GlaxoSmithKline and Omnicuris campaigns have helped add value to my practice" (P-13)

"Sunpharma's digital engagement has been effective" (P-21)

Theme 8: Future of digital engagement

HCPs' mentioned that their preferred mode of communication post-pandemic would be face to face communication but the acceptability of digital platforms will improve. Following are the HCPs' opinions on the reliance on digital platforms in the future:

"The effect of the pandemic is going to last for quite some time. This will increase the use of digital platforms as the world tries to reduce direct face to face interactions" (P-6)

"Yes, it'll increase, due to an increase in the number of COVID cases which may lead to extended lockdown or uncertainty over travel. Also from an academic point of view, especially webinars on the digital platform are informative and less time consuming" (P-11)

"Yes as it has taken a strong position in all other criteria and social, as well as interesting sharing of data for all fields and specializations from experienced professionals." (P-12)

"Nope, the profession needs a personal touch" (P-18)

Key Insights

i. Pharmaceutical companies are currently virtually engaging with HCPs by providing e-details through several platforms

ii. HCPs are experiencing a lack of detailed, personalized content and are overwhelmed with the overload of unwanted information. There is a general fear of missing out on important information that may add value to their practice

iii. HCPs are experiencing a missing link as they are not receiving adequate information on recent breakthroughs, new clinical data and updates and education on drugs and diseases as pharma companies are focussing on equipping the HCPs with information on their contribution towards the COVID-19 pandemic and patient management

iv. The pandemic has increased the acceptability of technology and HCPs would be comfortable with receiving personalized information through web banners, blog posts, and text messages. HCPs have varying preferences of digital engagement hence, Pharma companies should target the HCPs accordingly

Stakeholder 2: Pharmaceutical Marketing/Product Managers

Pharma marketing and product managers are integral decision-makers while developing engagement strategies. Hence, their opinion regarding the changes in pharmaceutical marketing trends was recorded. According to all the respondents, engagement with customers is happening digitally. Online CMEs and social media platforms for product descriptions are the most commonly used tools for engagement.

A respondent mentioned that *"In the current situation, companies are going all out to make sales by every possible platform. Yes, since the conventional channel is disturbed, people, as well as leading companies, are trying to make it available online with 1mg, PharmEasy, Netmeds, and other such companies." (P-2)* The most commonly used mode of engagement is applications like Zoom, MS Teams, WhatsApp, Google Meet, and communication via e-mails.

When asked about whether they have observed a change in customer behaviour during this time a responder replied, *"Yes, customer buying behaviours have changed nowadays customers are more specific in terms of Price, Competition." (P-5)* Most responses indicated that customers (HCPs and patients) are well aware of the alternatives and do check the same for the price and value.

According to the respondents, post the pandemic pharma companies will ensure that their marketing strategies consist of in-clinic and digital campaigns to educate the HCPs about their products. The current situation is enabling HCPs to adapt to the new digital ways; they are getting accustomed to digital content and a respondent mentioned that *"Nothing can replace personal touch so direct selling will still override all other means. But yes, the inhibition towards digitization would be reduced." (P-7)*

Key Insights

i. Due to challenges associated with traditional ‘in-clinic’ communication strategies, Pharma companies are leveraging every digital platform within their reach to engage with HCPs and patients
ii. Pharma companies are utilizing platforms like 1mg, PharmEasy, Netmeds as conventional supply channels are disrupted
iii. Pharma managers are noticing a shift in consumer buying behaviours. According to them, consumers make informed decisions and are well aware of the available alternatives
iv. Pharma Managers expect a shift in marketing strategies post-pandemic to a combination of digital and in-clinic engagement as they expect a reduction in the inhibition towards digitization

CHAPTER 6: INSIGHTS AND RECOMMENDATIONS

Table 1: Insights and Recommendations

Insight	Recommendation	Resources needed for implementation	The timeframe needed for implementation	Impact	Priority
i. HCPs are currently facing certain challenges concerning communication with pharmaceutical companies. They are experiencing a dearth of personalized content, repetitive information, decreased focus on non-COVID related information and fear of losing out on important information due to intrusive mass e-mails	Deploy an Robotic Process Automation (RPA) solution on the company's website and social media platforms. The chatbot should record the HCPs preferred type of content, areas of interest, preferred mode, and time for engagement. This will smoothen the process of information delivery and will enable pharma companies to target their customers (HCPs) accordingly	**Product Vendors:** i. Value Coders: Builds data-driven business solutions using various emerging technologies like AI, ML, IoT to improve efficiency. Hands-on-experience in Prototype designing and RPA Project Management. Provides RPA developers on a dedicated team, hourly, and fixed price model basis Average Hourly Rates: < $25 / hr ii. JK Technosoft: Builds robust digital solutions to transform businesses and aims to offer RPA services offer to Dairy, CPG, Insurance, Transport, Healthcare, Retail, Logistics, Manufacturing verticals and Software Product/ Solution companies Avg. Hourly Rates: $150 - $199/hr iii. SynLogics: Makes productive strategies to increase business ROI. Works with dedicated team members to transform businesses entire workflow Avg. Hourly Rates: $100 - $149/hr	This depends on the complexity of the system. Simple systems can be installed in less than 2 weeks whereas, the ones with more complex workflows may take 2-3 months	This will enhance customer (HCPs) satisfaction, increase brand recall and will help pharma companies build better value for their brand	High

		Internal infrastructure i. Access to hardware and IT infrastructure system access, new user set up for the robots, and technical support ii. Training modules for advancing technical skills like coding, data analytics, and knowledge of the business process iii. Soft skill training, CRM sessions, development of writing skills and problem-solving abilities for salesforce and marketing teams			
2. HCPs and Pharma salesforce need practical support that will help them to do their job safely and effectively in the immediate crisis	Creating a one-stop digital solution/application that contains an interface for HCPs and an interface for Pharma reps. **a. Pharma Reps** Through this platform, Pharma reps can receive product training, target KOLs and HCPs via visual aids and virtual presentations, track their daily activity, and interact/learn from fellow teammates. **b HCPs** HCPs can connect with Pharma reps and patients	A dedicated team of IT personnel equipped with the knowledge of coding and emerging technologies, efficient UX designers for the interactive platform, market research analysts to understand the viability of the solution, content curators and creators dedicated purely for the development of this platform	This intensive work may just take 2-3 months to develop a testing model	This modular solution will enable pharma companies to skyrocket their digital communication strategies. Through salesforce effectiveness tools, customer relations can be improved. A user-friendly interface will attract more	Medium

	via video calls. The platform should contain a directory of blogposts, clinical trials, surveys, prescription& treatment guidelines, etc			HCPs thereby adding value to the brand and increasing the brand's recall	

CHAPTER 6: ANNEXURE

Methodology For Primary Research

6.1 Type of research

The research design employed for this study was a qualitative one and exploratory

6.2 Period of study:

This market research study commenced on the 8th September 2020 and it panned over 2 weeks

6.3 Data Collection

i. Primary Data: The primary research comprised of the opinions of two stakeholders: HCPs of varying years of experience and Pharmaceutical Marketing and Product Managers
ii. Secondary Data: Secondary data was collected from the following sources: a. Newspapers like Economic times, b. White Papers and Reports by consulting and market research firms, c. Articles on websites that post content on the pharmaceutical sector, d. Blogposts

6.4 Questionnaire Development

i. Questionnaire for HCPs: A set of 10 questions comprising of open-ended and multiple-choice questions were designed for the HCPs, based on the objectives of the study. The questionnaire comprised of basic demographic details with the intent of better analysis
ii. Questionnaire for Pharmaceutical Managers: A set of open-ended questions were designed to understand the perspective of these industry specialists

6.5 Sampling Techniques

The respondents were selected based by Simple Random and Purposive Sampling Method and the sample size for HCPs was 25 and for Pharmaceutical Managers was 7

6.6 Limitations of the study:

i. This study was limited to stakeholders like HCPs and Pharmaceutical Marketing/Product Managers. Other stakeholders like pharmacists and patients are not selected for this study
ii. The study is limited to digital marketing trends adopted by the pharmaceutical sector
iii. Data and insights gathered from this study were recorded through telephonic conversations and online surveys due to lockdown restrictions
iv. Sometimes due to factors like business confidentiality or other issues, stakeholders may not be able to express their views. Therefore the insights are based on the information provided and may be biased
v. Limited ability to gain access to a larger sample size
vi. Due to the qualitative nature of the study and small sample size, statistical analysis is not provided

However, to overcome these limitations and maintain effectiveness sincere efforts were put.

CHAPTER 7. REFERENCES

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