



Building Healthcare Brands in the Post-COVID 19 Era

Whitepaper

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Executive Summary

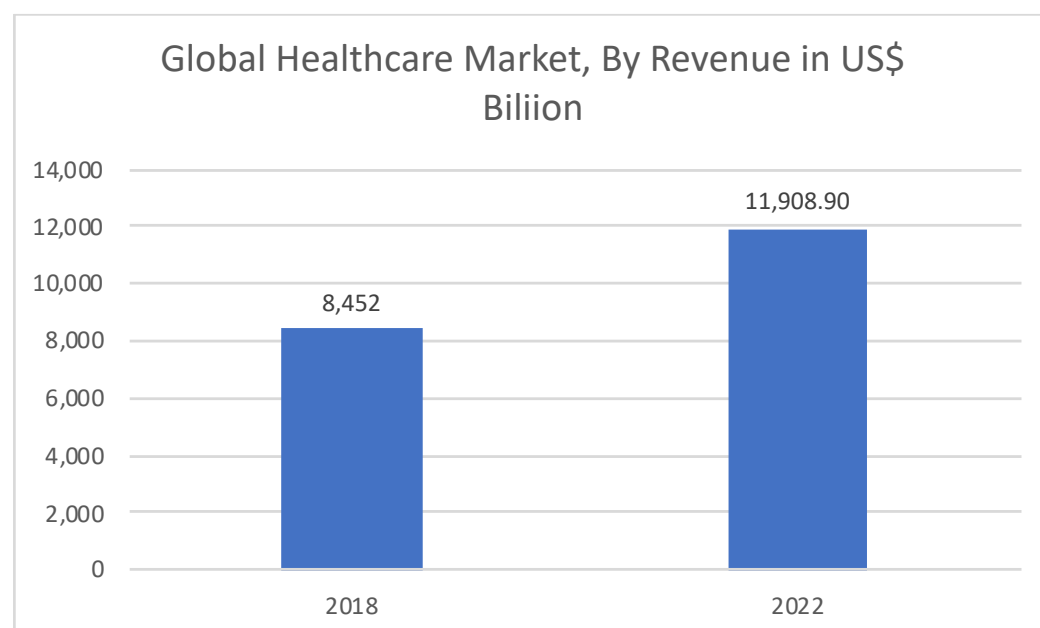
This whitepaper with topic “**Building Healthcare Brand in the Post-COVID Era**” covers what all can a brand do to promote its products digitally. It reveals the impact of COVID19 in the pharmaceutically industry and the ways to tackle the same in terms of integration of medicines across modern and traditional streams, emergence of digital therapeutics and non-pharmacological interventions. This report also covers a company’s strategy to launch products via digital platforms, interaction of pharma giants with med-tech companies, changing dynamics of the patient-doctor relationship due to the booming digital channel- telemedicine. Moreover, the whitepaper also details about impact of COVID 19 on competition between pharma giants and med-tech companies and brand building associated with it. Apart from this, to use digital platforms for branding, Artificial Intelligence (AI), Big Data, Virtual Reality (VR) will see very high growth to access patient data required for branding. In continuation to brand building, this research also covers the impact of COVID on “customers” and “consumers” in the pharmaceutical industry as to if the end-user dynamic will change and if pharma companies will have to look at promotion in an entirely new approach.

1.Introduction to Healthcare Industry

Healthcare industry comprises of several parties which offer to treat and cure patients. Such treatments include hospitals, medical devices, clinical trials, outsourcing, telemedicine, medical tourism, health insurance and medical equipment, so in a way facilitate healthcare to patients. This industry deals with the companies or brands that play a pivotal role in diagnosing, treating, nursing, and managing diseases, illness and injury. Such offerings to patients are made possible through collaboration among doctors, nurses, medical assistants, government agencies, pharmaceutical firms, medical devices manufacturing companies and medical insurance companies.

In terms of value of the global healthcare market, is anticipated to register US\$11,908 Billion in 2022 from US\$8,452 Billion in 2018 with a CAGR of 8.9%. This growth will mainly be due to high penetration of healthcare products and services mainly in North America and Asia-Pacific regions. In North America, U.S. is the major market driven by increase in demand for healthcare services due to the highest number of **COVID 19 cases (6.7 million cases)** in the country along with aging population, increase in prevalence of other chronic disease for **COVID 19** positive patients, and need for higher quality of life. Industry growth, major changes, and strong value-creation potential make healthcare an exciting industry.

Exhibit 1: To illustrate global healthcare market growth (2018-2022)



Source: BusinessWire



1.1 An Overview of Pharmaceutical Industry

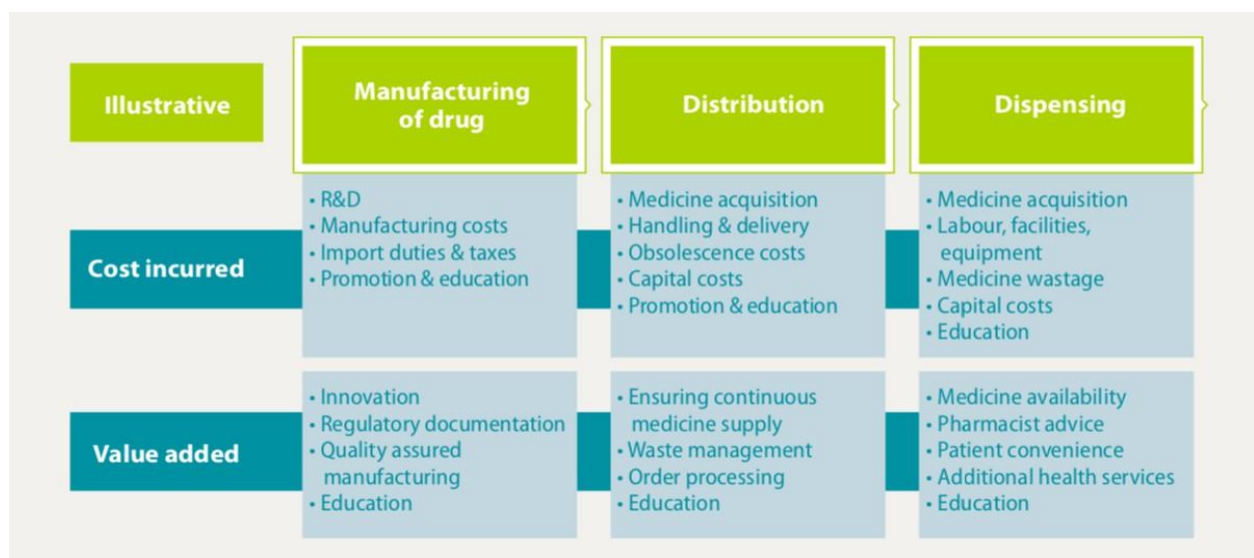
The pharmaceutical industry is involved with developing vaccines and other drugs for treatment, prevention and reduction in disease occurrence. Other roles of the pharmaceutical industry involve enhancing quality of life by constantly doing innovative research using technological advancements to fill the need gaps of patients. The pharmaceutical industry within the healthcare space consists of different subsegments of development, manufacturing, production and marketing of medications by drug manufacturers and biotechnology companies. Discovery of medications or drugs are accelerated by modern technologies and scientific advances which aim to reduce side-effects of a drug and provide improved therapeutic activity. Such drugs for human usage often go through pre-clinical development, regulatory bodies ensure clinical trials and safety to determine efficacy and level of safety before finally launching it in the market.

1.2 Value Chain in Pharma

- 1) **Manufacturing:** Multiple steps are involved to manufacture a medicine. Starting from the initial phase to development phase, a regulatory body is involved, which permission is required to commercialise the product. Laws of such regulatory bodies differ in different countries.

- 2) **Distribution to dispensing point:** This is the phase of transporting the medicine from manufacturer to the retail pharmacy or hospital. Distance, nature of final destination, manufacturer location, handling requirements etc. affect distribution.
- 3) **Dispensing to end-user:** Making the end-user aware about correct medicine dosage in a timely manner by providing right advice, providing reimbursement claims etc. is the final step of value chain.

Exhibit 2: To illustrate break-down of the value chain by stakeholder



Source: www.ifpma.org

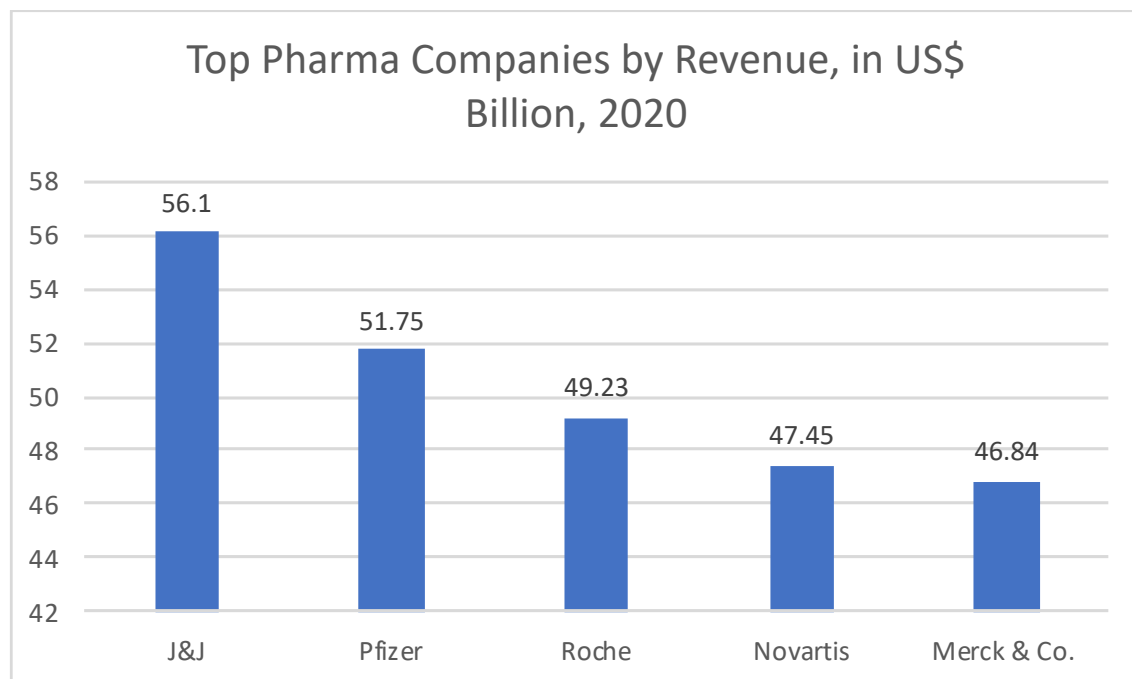
1.3 Roles of Stakeholders in Distribution Channel

While hospitals and clinics generate revenue through patients directly, pharmaceutical and medical devices giants generate revenue by “prescription generation”. Pharmaceutical products such as medicines, drugs, involved in surgeries treating patients comes under Pharma Sales. This type of sales is very different from consumer goods sales in terms of target market and the way it is sold. In Fast Moving Consumer Goods (FMCG), products are advertised and sold directly to the consumers. However, in pharma, doctors are the customers or target market through which the products reach the end consumers or patients. While the buyers for medicines are Chemists, Distributors and Hospital Pharmacies, buyers for medical devices such as implants or instruments are Doctors and purchase officers.

1.4 Top Pharmaceutical Companies in India

J&J leads in terms of revenue of US\$ 56.1 billion with Pfizer and Roche being close enough registering US\$51.75 billion and US\$49.23 billion in 2020. J&J's revenue was mostly boosted by sales in the US market, acquisitions, divestitures. The main sectors which contributed the growth of the pharmaceutical division were driven by the immunology (US\$13.95 billion) and oncology (US\$ 10.69 billion) in the portfolio. Pfizer's revenue was mainly contributed by the international markets which made up 54% of the company's revenues driven by anti-infective products sale in China, including its antibiotic drug Sulperazon.

Exhibit 3: To illustrate top pharma companies in India, by Revenue (US\$ Billion), 2020



Source: Pharmaceutical Technology

1.5 Stakeholders Mapping in Pharmaceuticals

Exhibit 4: To illustrate mapping of stakeholder, Self Research

STAKEHOLDERS MAPPING IN HEALTHCARE				
EXTERNAL STAKEHOLDERS				
Stakeholder	Power	Influence	Interest/Need	Support/Attitude
Supplier	Low	Low	High	Negative
Hospital Retailer	Low	High	High	Neutral
Regulatory Bodies	High	Low	Low	Neutral
Hospital purchase	High	High	High	Neutral
Doctors	High	High	High	Neutral

INTERNAL STAKEHOLDERS				
Stakeholder	Power	Influence	Interest/Need	Support/Attitude
Marketing	High	High	High	Positive
Sales Force	High	Low	High	Positive
Legal	High	High	High	Neutral
Medical Affairs	High	Low	High	Neutral
Regulatory Affairs	High	Low	High	Neutral
Business Compliance	High	Low	High	Positive

1.6 Regulation in Pharmaceutical Industry

Regulatory Affairs is a legal framework concerned with pharmaceutical and similar products in a national and global perspective. As drugs are not just another product, it is important to ensure quality, safety and efficacy of such products. Such a body for India is CDSCO. Hence, the authority perspective is to assess documents related to such products which are submitted for approval.

Regulatory Affairs in Product Life Cycle

Development Phase

- Advice on development
- Scientific Advice
- Clinical Trial Applications
- Project management / Strategy
- Product Information - Claims

Application and Approval Phase

- Authority meetings
- Electronic submission
- Readability Testing / Labelling Support

Post Approval Phase

- Life Cycle Management/Compliance
- Post-approval Commitments
- Clinical Trial Applications
- New Indications

2. Marketing Channels in Pharma

2.1 Pharma Product Mix

1) Non-personal communication

Advertising: Advertising can inform, create awareness, and interest and can even lead to the stage of evaluation. But in pharmaceutical marketing, the effect of advertising stops at the point where the target audience is receptive. It requires the persuasive pressure of the personal selling effort to induce a trial. An advertising campaign can create a better climate, a favourable disposition for the sales force to move in and clinch the sale. Advertising cannot create or increase the sales directly, but can play a very useful supportive role, when used creatively and effectively. Journal advertisements attract attention because they are visually appealing. Professionals may also see them as a way of keeping up-to-date.

Publicity: This can create and increase awareness and interest. It can also create a favorable disposition by improving the credibility of the pharmaceutical company's communication. It can probably facilitate repeat usage by satisfied customers. But it can neither induce trial, nor increase usage.

Sales Promotion: Sales promotion policy will not be successful if there are not enough prescriptions and therefore should be backed by advertising and personal selling efforts. Sales promotion is an organized, preplanned component of the overall promotional mix and should be used with the strategic promotional objectives. It can be utilized by a manufacturer to distribution chain intermediaries or organizational buyers or retailers, or by a retailer to customers. Sales promotion campaign needs to follow the overall promotional strategy—by satisfying the corporate objective. Some of the most common pharmaceutical sales promotion methods are: sample distribution, premium incentives, point of purchase displays, couponing, advertising specialties, promotional licensing, sponsored events, specialty printing, promotion fulfillment, interactive or tele promotions, refunds or rebates, customer contests, product demonstrations (physicians, nurses, patients).

2) Personal communication:

The medical detailing is similar to personal selling. It is an approved, regulated, and is a major tool for pharmaceutical marketing communications. It provides sales support where medical representatives are involved to influence the prescribing pattern of a physician. It also deals with prescriber buyer dissatisfaction and enhance post purchase customer service. This helps in implementation the strategies developed by the marketing department.

2.2 Key Promotional Tools in Pharma



Visual Aid



Leave Behind material



Direct Mailers



KOL/Seminar



Samples



Brand Reminders

3. India Healthcare Opportunities: An Outlook

3.1 Description

India's one of the largest sectors is healthcare both in terms of revenue and employment. This growth is due to its strengthening coverage, services and increasing spend by public and private players. Indian healthcare delivery system has two major segments - public and private. The Government, i.e. public healthcare system, witnesses limited secondary and tertiary institutions and is mainly focused on providing basic healthcare facilities such as primary healthcare centers (PHCs) in rural areas. The private sector provides secondary, tertiary, and quaternary care institutions focused in metro, tier I and tier II cities. This accounts for approximately 74 per cent of the country's total healthcare expenditure. Main reason for India being so lucrative in terms of healthcare are availability of well-trained medical professionals, cost competitive as compared to its peers in other parts of the world, rising income level, more health awareness, increased number of lifestyle diseases and improved insurance facilities among others for this growth. Apart from this, telemedicine, which is considered as new innovative approach to treat patients is booming. National Telemedicine services completed more than two lakh teleconsultations since its launch, helping in patient-to-doctor consultations from the comfort of home. Major hospitals (Apollo, AIIMS, and Narayana) use telemedicine services and entered several public-private partnerships (PPP).

3.2 Market Size

The Indian healthcare market is forecasted to reach Rs 8.6 trillion (US\$ 133.44 billion) by 2022. One major segment, Indian medical tourism market is growing at 18 per cent y-o-y and is forecasted to reach US\$ 9 billion by 2020. The Government's expenditure on healthcare sector has is 1.6 per cent of the GDP in FY20 as compared to 1.3 per cent in FY16. Health insurance is also witnessing spike in India. Gross direct premium income underwritten by health insurance grew 17.16 per cent y-o-y to Rs 51,637.84 crore (US\$ 7.39 billion) in FY20.

3.3 Investment

Some recent investments in the Indian healthcare industry includes the following: -

- In May 2020, Jubilant Generics Ltd made a licencing agreement with US-based Gilead Sciences Inc to manufacture and sell the potential COVID-19 drug Remdesivir in 127 countries, including India.
- In April 2020, first COVID-19 sample collection mobile lab of the country, namely 'Mobile BSL-3 VRDL Lab', was launched, which has the capacity to process more than 1,000 samples in a day and enhance country's capabilities to fight with COVID-19.
- The value of merger and acquisition (M&A) deals across hospitals plummeted by "triple digit" 155 percent to Rs 7,615 crore (US\$ 1.09 billion) in FY19.

3.4 Government Initiatives

Key initiatives taken by the Government of India to promote Indian healthcare industry are as follows:

- In Union Budget 2020-21, US\$ 5.09 billion has been allocated for nutrition-related programmes.
- The Government has announced US\$ 9.87 billion outlay for the health segment that is inclusive of US\$ 915.72 million for PMJAY in Union Budget 2020-21.
- In 2018, Government of India launched Pradhan Mantri Jan Arogya Yojana (PMJAY), to provide health insurance worth US\$ 7,124.54 to over 100 million families per year.
- In August 2018, the Government of India approved Ayushman Bharat-National Health Protection Mission which was a scheme contributed by both Centre and state Government at a ratio of 60:40 for all States, 90:10 for North East, 60:40 for Union Territories with legislature and 100 per cent by government for Union Territories without legislature.
- The Government of India launched Mission Indra Dhanush to improve coverage of immunization in the country. It targeted to achieve at least 90 per cent immunization coverage by December 2018 and facilitate vaccines to unvaccinated and partially vaccinated children in rural and urban areas of India.

3.5 Achievements

Listed below are the achievements of the Government:

- As of July 2019, approximately 125.7 million families enrolled as beneficiaries under Pradhan Mantri Jan Arogya Yojana (PMJAY). The scheme enrolled 16,085 hospitals, including 8,059 private hospitals and 7,980 public hospitals. It included 19 AYUSH packages in the treatment scheme.
- Until September 2019, approximately 50 lakh people received free treatment under the Ayushman Bharat - Pradhan Mantri Jan Arogya Yojana.

3.6 Future opportunities

India has too many opportunities to offer to pharmaceutical industry. The country has also become one of the leading destinations for manufacturing drug thus catering to a greater proportion of population. Besides, Indian consumers have become more conscious towards their health especially due to COVID 19. Indian pharmaceutical sector is a diversified sector and is a land of opportunities in segments such as providers, payers, and medical technology. As competition has increased businesses are looking to explore for the latest dynamics and trends which will impact their business positively. Also, the hospital industry in India is forecasted to increase to US\$132.84 billion by FY22 from US\$ 61.79 billion in FY17 at a CAGR of approximately 16-17 per cent. Apart from this, other major boost can come from the Government of India as it is planning to increase public health spending to 2.5 per cent of the country's GDP by 2025.

4. Post COVID Scenario in Healthcare

The COVID-19 pandemic has identified gaps between health, wellness, and prevention. It actually disrupted the standard norms of prevention and treatment. This disruption served as a catalyst to create multiple opportunities along the healthcare value chain for both patients and healthcare providers. Opportunities such as Virtual care which was earlier not a mainstream service for healthcare delivery. However, COVID has revealed its clinical, operational, and financial value. In an extension to this, virtual clinical trials through telemedicine can help address the gaps and fill them.

Moreover, analytics is another major segment which can support prioritization, trial delays, and the development of new investigator sites. Further, hospitals and medical device companies can focus on remote patient engagement strategies, including virtual rehabilitation, virtual assistants, chatbots, telehealth for the management of patient care.

5. Emergence of Digital Therapeutics

Digital therapeutics (DTx) which uses software to treat disease has been emerging at a rapid pace. This has wide usage from improving patient's adherence to supporting healthcare professionals (HCPs) in managing their patients and businesses digitally. Also, by involving artificial intelligence (AI) to interpret physiological results, DTx is helpful to predict and manage patient's future health. DTx brings personalized care to patients, and Life Science companies use such real-life data to predict outcomes.

Exhibit 5: To illustrate Digital Therapeutics: A subset of Digital Health

Digital Therapeutics Within Digital Health



Source: www.medium.com

Due to its multiple benefits and being cost-effective, healthcare ecosystem is increasing their focus to involve DTx:

1. Pharmaceutical & medical devices companies are developing DTx to improve overall clinical outcomes
2. Payers and providers are using DTx to treat continuous increase in patient numbers at low cost
3. Due to **COVID-19**, regulators are encouraging digital innovation to support treatment outside of healthcare facilities.

Below are the benefits of DTx especially during **COVID-19**

Allow Continuous Real-World Data Collection

DTx tracks large amount of data and hence is a ready repository of real-world data to be used to communicate, safety, cost-effectiveness and advocacy for market access. It can also be connected to other data sources such as chat bots, decision support systems, and connected biosensors thus ensuring availability of a full map to help in patient management. In the time of Machine Learning algorithms, it can also be used to analyse text and image data to help the stakeholders remain better informed.

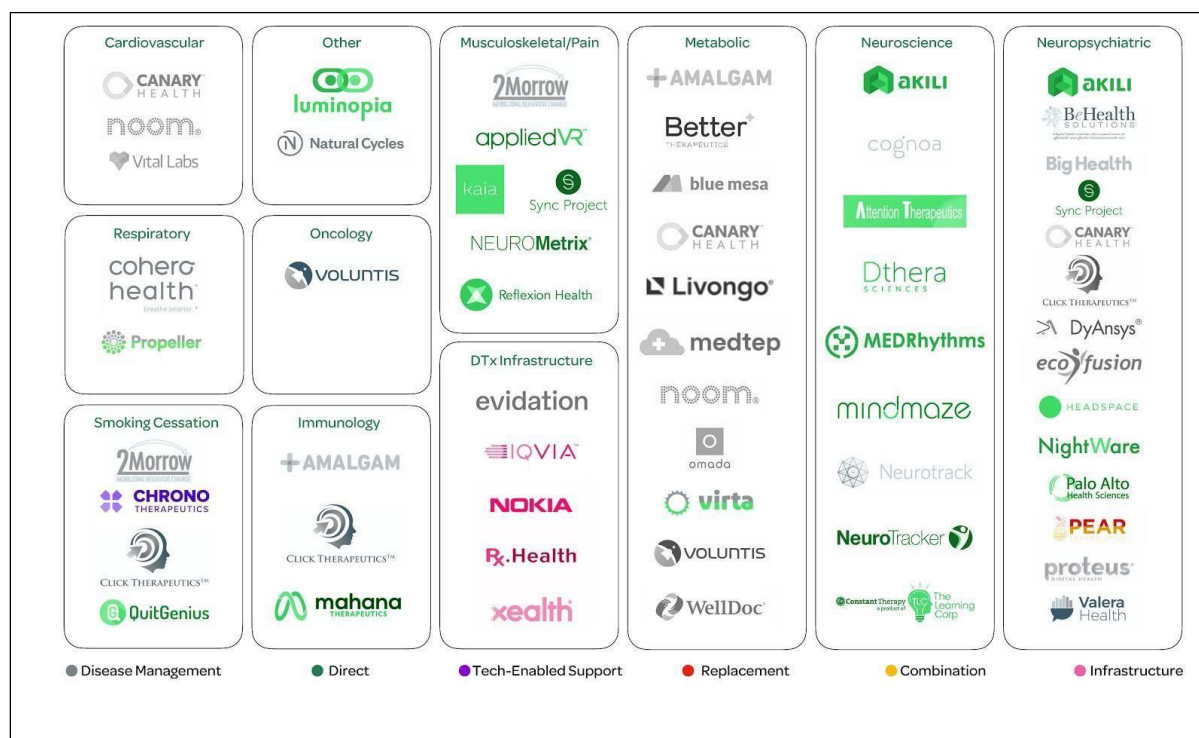
Deliver Continuum of Care Outside of Healthcare Facilities Linking DTx to biosensors, smart watches, user-friendly apps can prove to be extremely useful for healthcare providers. For example, in the US, DTx was used in treatment of Schizophrenia patients during the COVID-19 pandemic aimed to reduce potential COVID-19 exposure at healthcare institutions. So, in a way, DTx can identify chronic disease patients at-risk of developing complications and highlighting before these increase even more. A real benefit to the patient and also to payers as they early diagnosis and treatment, prevents high cost expenditure.

Digital Therapeutics Applications in Real World

Digital therapeutics is no longer just in a theory paper, it has been implemented by various companies and the results are remarkable. Such achievements of digital therapeutics include- A prescription digital medicine company known as Akili Interactive designed a video game known as "Project Evo" which improves cognitive deficits in children with attention deficit hyperactivity disorder (ADHD or ADD) and autism spectrum disorder (ASD). This is done by providing opportunities for multitasking through a game and engages patients for over four weeks. 2Morrow, Inc. identifies abnormal behaviours that cause chronic diseases with digital therapeutics, involving an approach called acceptance & commitment therapy, or ACT. This helps the users become aware of unhelpful thoughts so that can determine to move forward with committed action toward their goals.

Similarly, Omada Health provides personalized support for people at risk for chronic conditions and their ever-evolving needs, helping them to achieve their health goals. Ieso Digital Health offers a unique solution by providing online cognitive behavioural therapy (CBT) for patients who experience common mental health issues. Treatment is done directly by a qualified therapist through typed conversation using online therapy platform. Appointments can also be scheduled through the platform, and patients can always revisit transcripts of their previous therapy sessions in-between sessions to remind themselves of what they have learned so far as well as updating their therapist on progress using a secure messaging system. By helping these patients via digital therapeutics, physicians are able to collect more data, which can be used to support industry research. WellDoc's digital assistant BlueStar, a digital therapeutic for Type 2 diabetes management, concluded that on average \$250 per patient per month can be saved. The app-driven program also features behavioral coaching, motivational messages, educational content, and other tools for population health analysis. Further, Game change is a VR system that puts people with psychosis in simulations of the situations they fear, to help them to learn they are safe and to relieve their symptoms generally. These online therapies also encourage patients to adopt healthy behaviors, and social robots and smart pills that enhances the effectiveness of prescription drugs by improving patients adherence to dosage procedures. Further, digital therapeutics are being involved to tackle mental health. The most common application is digital delivery of cognitive behavioral therapy (CBT) for depression and anxiety disorders. Pear Therapeutics partnered with Sandoz, Novartis, to develop an app called reSET that delivers CBT for substance-abuse disorder. Its Sleepio system is an online self-care program based on CBT for insomnia, which has shown improvement in both insomnia symptoms and mental well-being.

Exhibit 6: To illustrate Digital Therapeutics Companies by Therapeutic Area and Type



Source: www.medium.com

6. Digital Drugs: Non-Pharmacological Intervention

Developed by Catalia Health “Mabu” aims to remind people to take medications. This robot uses artificial intelligence and psychological modelling to converse with patients and build relationships with keep them adhered to taking medication. Mabu is currently being used for people with kidney disease, rheumatoid arthritis and congestive heart failure. Savage, developed an ingestible sensor that can be incorporated into pills. The sensor is as small as the size of a grain and coated with copper on one side and with magnesium on the other side. As soon as the pill is swallowed, the liquid in the stomach connects these two sides which generates an electrical signal that is picked up by a person’s skin. Post this, a digital record is sent to a mobile application which is then shared with health-care providers.

7.Brand Building in Telemedicine Era

7.1 Search Engine Optimization (SEO)

Search engine optimization is quite effective to acquire new patients without advertising. The keywords that a customer types displays multiple search results of which, some results will direct the customer to the telemedicine facilities of a company. For example, if “online weight loss consultations,” is typed in then clinics which assist in weight loss clinic using telemedicine services will be displayed. If the clinic’s website is optimized for search engine to discover, then it helps in acquiring new patients.

7.2 Email marketing

Collaboration between hospitals and clinics or customer using the company app should be appropriate to gather email data of customers. Notification about the new telehealth service should be sent to customers almost every week to keep patients remind of the newly available service. They can also be shared a link which can direct them to the company website to gather further details.

7.3 Promotion on Social Media Platforms

Information about new telemedicine services can be posted on social media platforms such as Facebook, Instagram, Twitter etc. This helps the business reach more of your audience and also reach new people in the health community who are not aware about the facility. On Facebook and Instagram, the segment “Stories” option can be used to reach more people.

Exhibit 7: To illustrate promotion on social media

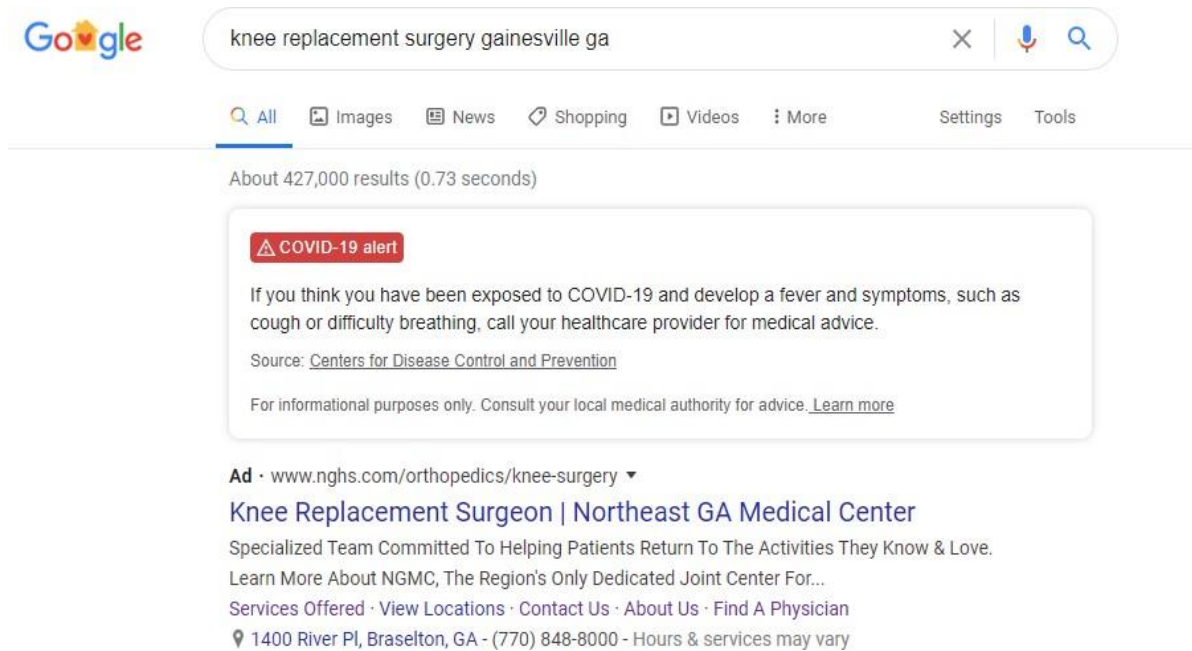


Source: full media

7.4 Google Search Advertisements

Search advertisements are highly effective to generate patient volume because they help the company advertisements get noticed when patients are looking for similar services. For example, ortho surgeons cannot target patients who have knee pain on Facebook. But they can surely target patients who are looking for information about what to do to reduce knee pain on search platforms. This becomes even more important during the COVID-19 when many patients are unable to reach to physicians physically owing to social distancing norms and working from home.

Exhibit 8: To illustrate impact of google search advertisements

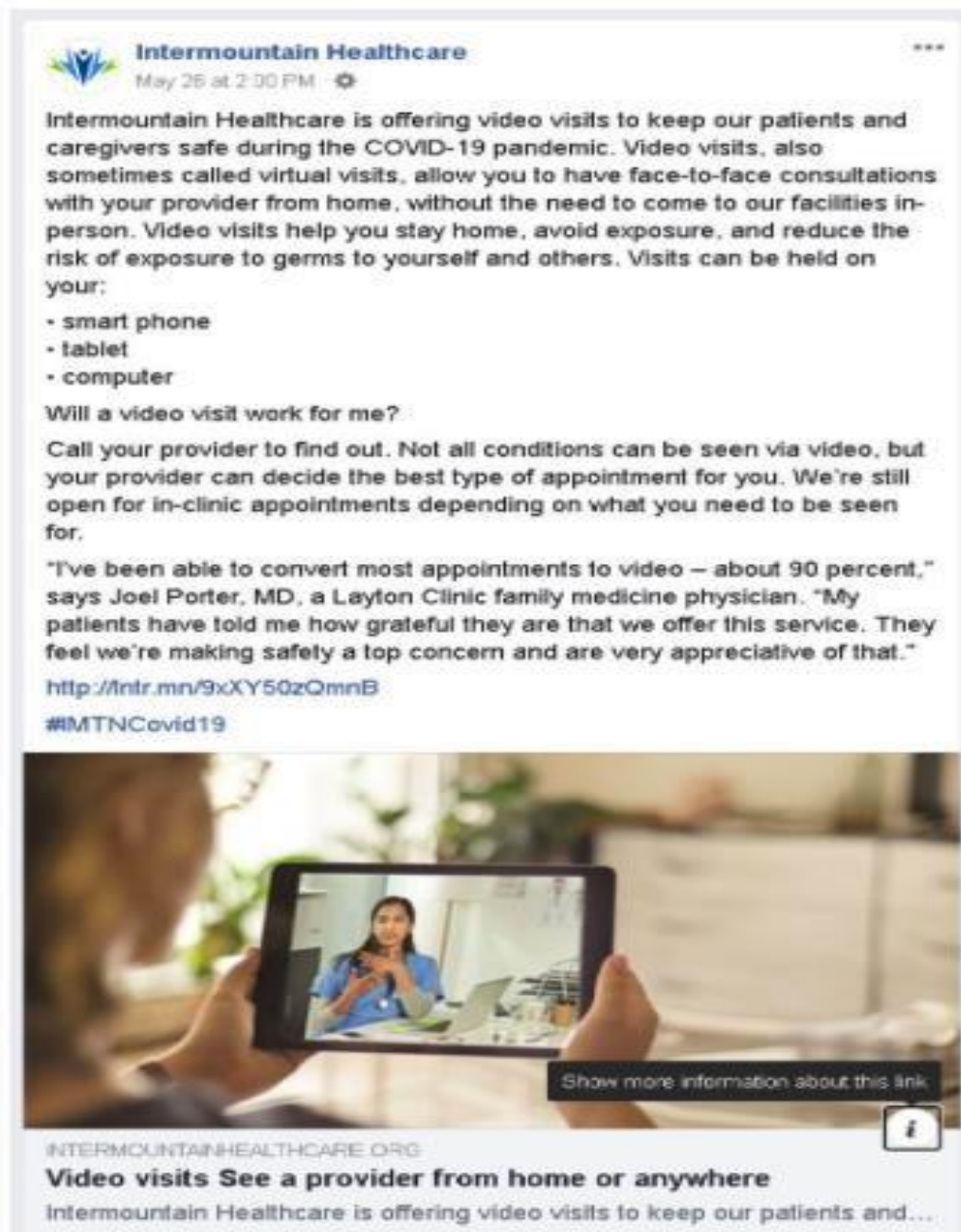


Source: full media

7.5 Attractive & Compelling Messaging

As patients are face with unique challenges in terms of healthcare, it is of immense importance to substantiate the benefits of telemedicine and how is it going to be different that traditional healthcare delivery method. In order to clarify such doubts and give the patient comfort, messaging should be attractive and compelling which can target patient's pain points and objections and showcase how is telemedicine better.

Exhibit 9: To illustrate attractive and compelling messaging



Source: Cardinal Digital Marketing

7.6 Create Educational Content

Content should be designed in a way that it conveys all the relevant information at one go to patients. Hence, telehealth webpage should answer all the important queries that a patient might have and provide links to relevant information. Such information includes instructions and expected experience on working of virtual visit.

Exhibit 10: To illustrate impact of educational content

The screenshot shows the Beacon Health Services website. At the top, a red banner states: "In-Person Appointments & Telehealth are available during regular business hours subject to COVID-19 safety restrictions." The navigation bar includes links for Schedule an Appointment, Physicians, Services, Locations, Patient Portal, Blog, and Careers, along with the phone number (513) 354-3700 and a "MORE" button. The main heading is "Telehealth Video Visits Now Available". The text explains that patients can now have video visits with physicians, physical therapists, and medical providers via video chat, currently limited to routine follow-up and post-operative care. It provides a link for directions on how video visits work and mentions that a URL link will be sent after calling the call center. Below this, it lists "New Patient Forms" with links for the Telehealth Consent Form and History Form, both for new patients. The "Insurance Coverage" section lists Medicare, Anthem, Aetna, Cigna, and United Healthcare, stating they have all expanded coverage for telehealth visits during the COVID-19 crisis. It also notes that the office remains open for in-person orthopedic evaluation and treatment, subject to COVID-19 restrictions. The "Physical Therapy Telehealth Services" section describes live access to a physical therapist via camera-enabled devices and provides a link for scheduling. A photo of a male doctor in a white coat is shown on the right side of the page.

Source: Cardinal Digital Marketing

7.7 Marketing through Telehealth Success Stories

Success stories from patients who have already undergone telehealth facilities can bolster prospective patient's confidence immensely. They keep getting accustomed to this new delivery system. In some time, a company can collect many such stories and advertise them in their website, and social media platforms. This will identify gaps or barriers in the telehealth services it aims to provide thus attract more customers.

Exhibit 11: To illustrate visuals of success story

The image consists of two side-by-side panels. The left panel shows a dark, textured background with the text: "Like many rural areas, rural Riverside County has a shortage of mental health professionals serving Medi-Cal enrollees." Below this, a small caption reads: "After Tragedy, Debbie Heals with the Help of Telehealth". The right panel features a portrait of Dr. Khadija Hamisi, a Black woman with short hair, wearing a white lab coat. She is identified as a "Psychiatric Nurse Practitioner". Below her portrait, the same caption as the left panel is present: "After Tragedy, Debbie Heals with the Help of Telehealth".

Source: Cardinal Digital Marketing

7.8 Sharing Telehealth New Facilities with Existing Patients

Sharing telehealth with existing patients and converting such patients to adapt to telemedicine will be relatively easy as existing patients already have trust in the brand. This sharing could be in the form of emails, messages, newsletters etc. or targeted ads to build awareness among them. A call could also be made to older patients to fix telemedicine appointments on their preferred time. As data about existing patients is already known, they could be reached out for personalized treatment and be provided with each specific detail.

8. Changing Patient and Doctor Dynamics

8.1 Telemedicine

Pre COVID, when the idea of video-chatting a doctor online seemed alien, today's patients are comfortable with the idea. Couple of months ago when physical interaction was common between doctor and patient, telemedicine was not so common. However, now during COVID times, telemedicine is considered as one safe option. Major push to telemedicine has been due to internet access, smartphones, and Skype. As institutions such as school and colleges adopted work- from-home solution, remote healthcare consultation also became common. Hence, **COVID-19 pandemic brought telemedicine into lime light**. As medical professionals need to stay healthy and disease-free as the same time treat patients, the need for remote technologies plummeted. Telehealth become success as it could bridge the gap between people, physicians and healthcare delivery systems, enabling patients to stay at home and communicate with doctors through virtual channels thus helping to reduce virus spread. In fact, telemedicine companies are continuously evolving. Telehealth is going to stay for long because it provides Increase access to healthcare to a population which is need of healthcare services.

Secondly, remote patients can consult with doctors from the comfort of home. Instead, the doctor will do a virtual visit to them. This specifically is highly useful for rural areas where Rural hospitals can do video consultations with specialty providers. Further, chronically ill patients can receive daily monitoring in the comfort of their homes. Telehealth also ensures improve healthcare outcomes and reduce no-shows. This way, patients are less likely to skip follow-up preventative routine. Old age people usually skip routine check-ups and telehealth could be of immense importance to them who can do vide consultation from home. Apart from this, telemedicine also improves process of discharge of patients from hospitals as caregivers or family members participate in teleconsultations where briefing happens on after-discharge care without even having to visit the hospital. Telehealth also improves Internal Finances as telehealth consultation can be replaced with non-essential emergency visits. Telehealth helps in Staff Training and Education as Telehealth programs can be specifically designed for multiple varieties of brands from hospitals and healthcare clinics to support specific objectives. These programs can be used to improve staff development, partnerships, financial performance ultimately improving patient care and brand success. As the COVID-19 pandemic continues to spread, telemedicine platforms are attracting large amounts of investment: in China, the Miaoshou Doctor platform, an app, that provides services in a health care, drugs, insurance model through online hospitals, has made \$84 million in a series D financing, in a valuation that exceeds \$1 billion. In Russia, BestDoctor, a private health insurance platform which offers 24/7 medical assistance and consultations, preventive care recommendations and online support from its doctors, and which enjoys strong growth, has also just raised \$4.5 million. And in the United States, Gyant, a health platform that works with twenty-four hospitals and health insurers to enhance engagement between doctors and patients through the use of artificial intelligence, has also closed a \$13.6 million financing round. However, for telehealth to stay for a very long time, it needs to address issues such as quality i.e. to ensure the health professional on the video conference is fully qualified and competent to deal with patients. Second issue is the trade-off between privacy and ease of use. Third is access issue. Patients will not able to realize the benefits of telehealth if physicians are not given incentives to continue telemedicine after COVID-19. Fourth is payment issue. Payment parity should be even after the pandemic as Telehealth visits are usually shorter and include fewer diagnostic services as compared to in-person visits.

8.2 mHealth

Mobile health frees healthcare devices of wires and cords which enables physicians and patients to check on healthcare processes on-the-go. Smartphones and tablets allow healthcare providers or doctors to freely access and send information. Physicians use mHealth for documentation or to simply learn more information about patients. This instant data glancing help doctors to treat their patients efficiently even being miles apart from the patient thus following social distancing norms due to COVID.

8.3 Portal technology

Post COVID, patients will increasingly be active towards maintenance of their health and a portal technology can help them to do so and also help physicians to keep a close watch on their patients. This technology allows physicians and patients to access medical records and interact online. Here doctors and patients are more closely involved and better educated about the patient's health scenario.

8.4 Remote monitoring tools

As going out from home and getting treated has come to a halt for patients, remote monitoring tools will see a huge boom. While on one hand, this remote monitoring system helps to reduce costs and unnecessary visits to a doctor's clinic office, it is also beneficial for the doctor as this method is less time consuming and offers flexibility of time to physicians. An application of such a remote monitoring tool is when a cardiac cast with a pacemaker automatically transmits data to a remote Centre. The moment any irregularity is observed, the healthcare provider is informed and necessary steps are taken.

8.5 Sensors and Wearable Technology

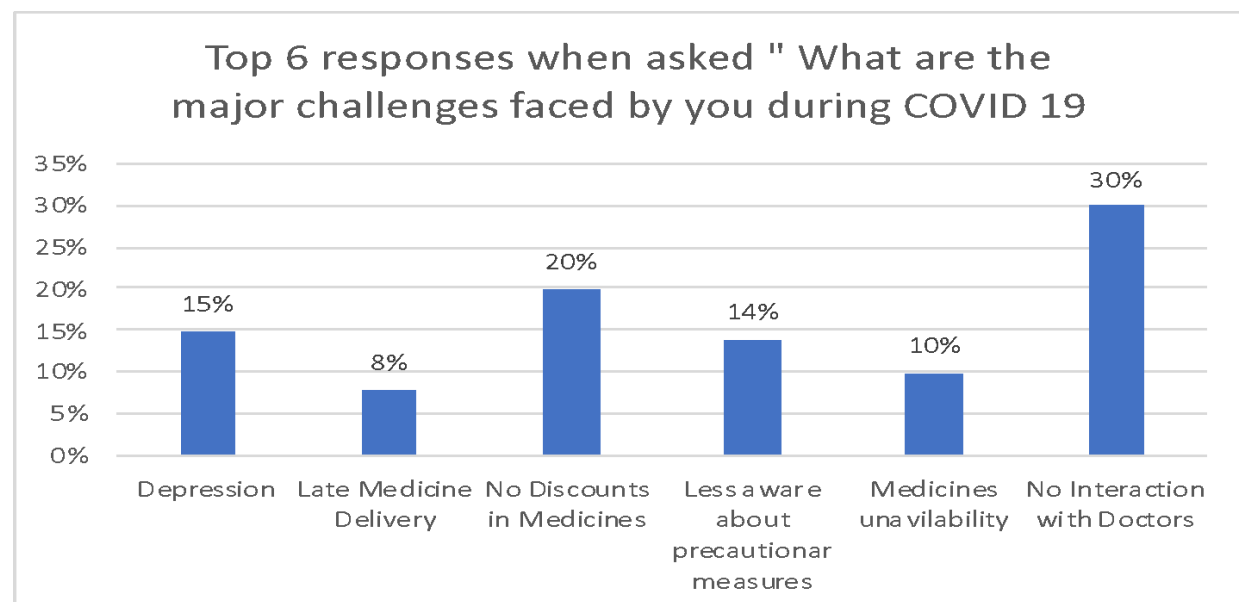
The wearable medical device market is booming especially due to innovation by tech-giants such as Apple, Samsung etc. Wearable medical devices have sensors attached to collect data which can help a physician to monitor a patient's health in regular intervals of time. Sensors and wearables alert the healthcare provider during any abnormality. Again, risk of virus transmission is minimized as physical hardcopies of health reports are not given to the doctors, which could cause infection. Here, relevant data to treat the patient is automatically sent to the physician.

9.Brand Building by Med-tech platforms

Innovation continues to interest the market shareholders even during COVID-19 which has halt the business. As the pandemic continues to provide a new look to healthcare market, many medtech companies are deciding the way ahead to launch products during this era of challenges and uncertainties. Amidst COVID 19, the scenario does not look too gloomy either only if the new product or service aims to deliver financial benefits and commands great value proposition. Hence, the need of the hour is to launch “disruptive innovations” which is also less expensive, now given the financial challenges. While some services will be sources of profit, others will drive only revenue. Hence, during COVID it is difficult if a service is aimed to drive only profit. Another thing to look at is how realistic is the market opportunity. Identifying needs and gaps in the market due to COVID is the issue to look at to address the market opportunities. A quick pilot survey with new customers and existing customers can give insights to identify such gaps.

Ref: Annexure 1 : Chosen a sample size (random sampling) of 70 patients (whose medication intake is at least twice a week) with hit-rate 70%. Those patients (no age bar) were identified by tracking prescriptions as an when patients came to the chemist shop. Post this identification, such patients were requested to answer a short questionnaire either in-person (following all social-distancing norms) or making cold calls to them, by seeking their permission. This study was conducted throughout a period of 10 days.

Exhibit 12: To illustrate response rate of patients on challenge during COVID19



Source: Primary research

This piece of primary research shows that out of 49 patients (70% of 70) who take medication at least twice a week, 30% patients faced challenges of interacting with doctors followed by no discount in medicines by the chemists. This is a gap which needs to be addressed. Telemedicine could be of immense help to patients as such video consultations will help patients to interact with doctors in time very easily. Hence, brand building on telemedicine gets easier as more number of people will interact with doctors to get treated. After COVID, as end-users are going to be the consumers, through telemedicine, brands could be advertised to them. Secondly, to fill the gap of no discounts, e-pharmacies can collaborate with local pharmacies and offer discounts to acquire more customers as medicine deliveries have seen high demand due to COVID 19. In order to address the needs and gaps which emerged out from the primary research here are some branding efforts which med-tech companies could involve. They are as follows:-

9.1 Discount

Med-tech companies can partner with credit card or Mastercard of a Bank where users will be given discount in form of points. For example, if they do a purchase of Rs. 100 using the card of that specific bank, then it gets 50 points which can be used to avail services on the med-tech platform.

9.2 Paid Advertisements

Collaboration with e-commerce giants such as Amazon, Myntra, to advertise Med-tech's products and innovative services on the latter's website in sports shopping space such as – sportswear, sports equipments etc. Med-tech's target consumers who are sports enthusiasts might be interested in, for example, Ayurveda video consultations, Yoga consultations when they are at home and want to maintain healthy life style.

9.3 Medicines Availability

Collaboration of med-tech companies with local stores can be done to make medicines available. This could be done through uploading prescription in their website and delivery of those medicines by the delivery executive of the company thus ensuring less chance of physical contact and getting infected.

9.4 Handling depression

As depression and loneliness during COVID 19 has emerged as one of the improvement areas, med-tech companies can collaborate with psychologists to conduct a common session for all registered users that would provide motivational tips to both COVID positive and negative patients to live healthy and provide tips for mental wellness. The physician can also provide

information in immunity, temperature tracking etc. to better handle the pandemic.

9.5 Spread COVID Awareness

Especially in rural, where information about precautionary measures for COVID is less, and infection rate is rising, video consulting (for registered users in that med-tech company) can be done to explain benefits using mask, physical distancing norms etc., As smartphone users in rural are rising and internet usage has increased quite a lot in the pandemic, this could be seen as an opportunity by med-tech companies to tap on.

9.6 Email marketing

Email marketing customized according to customers' taste to be mailed to registered users to share new product launches.

10. Emergence of e-pharmacy

Post COVID, Pharmacy will need to change to be customer-centric. Patients will expect immediate and digitalised solution, interaction with NHS services, as face covering and social distancing have become part of life now. Hence, the chemists should enhance their skills and efficiency to stay up-to-date. e-pharmacies target market is patients with chronic diseases, or who needs medicines on monthly basis usually in the age group of 45-80. As per research, this age group earlier provided resistance to technology but soon overcame it. Also with over 502 million smartphone users and 653 million mobile broadband subscribers in the country, the penetration of e-pharmacies will deepen further. Best e-pharmacy model is going to a hybrid model which is essentially partnership with local pharmacies to deliver at patient's home within minutes. This model will be best suited for rural and urban areas as well. More than 50 e-pharmacy startups in India, which were earlier serving 3.5 million households in India before Covid-19, now witnessed 2.5X growth to reach 8.8 million households during the lockdown period. Amidst lockdown, 50 per cent new households from non-metro opted for e-pharmacy service. As per statista, the value of India's e-pharmacies in 2019 was around \$20 billion while the market is currently dominated by 1mg, Netmeds, PharmEasy, Medlife, MediBuddy, and other investors such as Sequoia, Bill and Melinda Foundation, Temasek Foundation, IFC, Intel Capital that had invested \$700 million in e-pharmacies in FY20. To further substantiate the rapid change of e-pharmacy, Medlife is handling around 20,000 orders a day, has tied up with non-essential services such as Uber, Yulu and Zoomcar to use their fleets for deliveries.

It also partnered with start-ups such as Bigbasket and MyGate to jointly deliver essentials to customers located in Covid-19 hotspots, as part of a single order. The below primary research shows 90% of the respondents are in favour of e-pharmacy whereas 10% of them would still prefer retail pharmacies.

Exhibit 13: To illustrate response rate of patients on e-pharmacy



Source: Primary Research

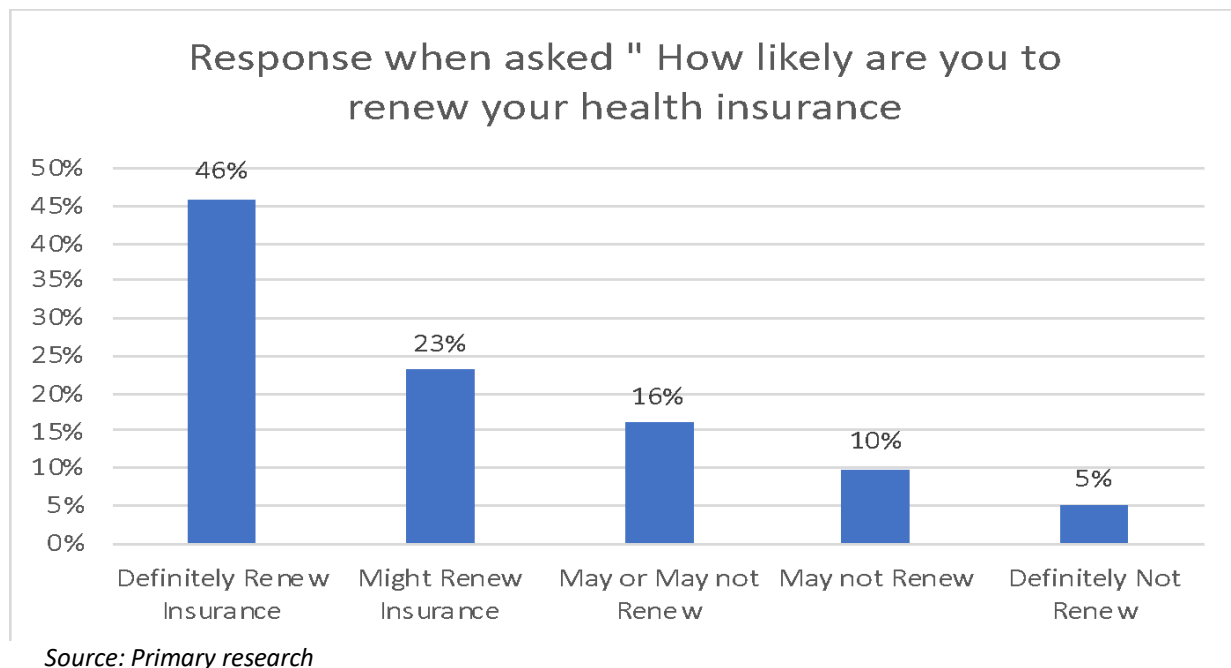
11. Penetration of Health Insurance

After the impacts of Covid-19, health insurance sector is definitely going to witness high growth. As thousands of people lost life in India alone, saving life from illnesses which are treatable becomes essential. Insurance is a living benefit product; hence lot of consumer's mindset is changing related to the same. People have started to realise that falling ill quite possible so a "safety net" can be insurance. This has led to increasing number of insurance purchases along with renewals rate going up. Secondly, while renewing, customers are increasing their sum assured value so that there is no need to buy a separate cover. People also are adding other family members in the plan that they are already enrolled with. Apart from this, people are asking first for a top-up product whose renewal is not due anytime soon. Similar options can be offered to the customers.

In order to strengthen above mentioned ideas, a quick primary research was conducted, which reveals, 46% of the respondents will definitely renew their existing insurance plans while 23% might renew and 16% of them are still considering to renew their existing plans.

Ref: Annexure 3: Chosen a sample size (random sampling) of 50 patients (whose medication intake is at least twice a week) with hit-rate 80%. Those patients (no age bar) were identified by tracking prescriptions as an when patients came to the chemist shop and already has some health insurance. Post this identification, such patients were requested to answer a short questionnaire either in-person (following all social-distancing norms) or making cold calls to them, by seeking their permission. This study was conducted throughout a period of 10 days.

Exhibit 14: To illustrate response rate of patients on health insurance



12. Emergence of patient as key customer

Post COVID, patients will be the key customers for the healthcare brands. As pharma companies and digital healthcare companies can collaborate, prescription generation will not be the main business as doctors will prescribe medicines of the company he is employed to. Thus, it becomes important to advertise to the patients about pharma and digital healthcare company brands so that patients can choose that particular company. As things are going digital, pharma companies will need to collaborate with digital healthcare companies to make them go digital as going digital is the need of the hour. In this scenario, pharma companies building its own digital centre will need heavy investment and process will be time consuming. Hence, it is best to collaborate or partner with digital companies who already have a strong set up to provide services digitally.

13. Big Data for Customer Intelligence

Major life sciences companies separate themselves using big data analytics to generate insights about customer data. As pharmaceutical companies cannot be complacent about how well they know their customers because customer behaviour or pattern keeps changing and here comes the need for customer intelligence data and analysis to make informed decisions. Organizations are keen to tap both traditional and newer “big data” resources to apply advanced analytics programs to detect trends, patterns, and other insights to guide efficient and effective operation.

Big Data unlike transaction data alone can drive insights as per context derived from consumer behaviour across channels. This analysis help companies understand and forecast what behaviour make it to final purchase, what type of engagement is required to make customers loyal. Advanced analytics is required to derive maximum value from customer data. Advanced analytics include predictive analytics, statistics, data mining, machine learning, and natural language processing. They help users to experience beyond standard business intelligence (BI) or online analytical processing (OLAP) querying and reporting to range over data for patterns, trends, and correlations. Hence, Big data analytics applies advanced technologies to derive insights from large and diverse data sets that typically includes varied data types and streaming data.

13.1 Gain a Comprehensive View of Customers across channels

Data is the basic element of any customer intelligence strategy. Today customers generate voluminous and diverse data through activity across channels. Such activities include physical stores, kiosks, field-sales offices, and call centres, mobile, e-commerce, and social media. Hence, a pivotal step is to develop a strategy for accessing and integrating customer data. Using analytics on data collected across multiple sources gives a “360- degree” view of a customer’s interactions and experiences across channels. This helps the companies to respond diligently when a customer engages with its organization at any touchpoint. Hence, advanced analytics determines the effective marketing approach and offer relevant products to the customers.

13.2 Advanced Analytics Enable Personalised Marketing and Engagement

Strategic marketing inputs aimed to provide personalization includes one-to-one marketing, micro-marketing, finer segmentation, and mass customization which is dependent on data insights. Predictive and big data analytics help organizations understand customers time spend on one category, opting for expensive or cheaper products etc. To give personalised marketing experience, analytics can help to sharpen customer targeting and determine the right time to cross-sell or up-sell offers. Big data sources also capture customer behaviour data such as event streams and clickstreams, page views, and logs which can be aimed to create personalization.

13.3 Big Data Analytics to Sharpen Social Media Strategies

While traditional experimentation might take years, by using big data the journey could be much shorter. Listening and learning from social media activity and applying those insights intelligently can be helpful to do right marketing. Text analytics methods are crucial to analyse social media data. Statistical and linguistic techniques are employed to interpret sentiments. Using algorithms to filter out noise and factor in common uses of irony, sarcasm, double negatives, and other linguistic elements, text analytics help organizations quickly understand the reaction stimulated by marketing campaigns, product introductions, events, and competitors' strategies.

14. Life Sciences and Digital Healthcare Collaborate for Brand Building

Brands should collaborate to make it profitable for everyone. While on one hand pharmaceutical companies are in need to go digital and use advanced technologies to address the upcoming problems, certain digital healthcare companies which are start-ups are in dire need of investment to develop their technology to make it more powerful to analyse large amount of data. Brand building effort will reduce as advertising efforts will be shared hence, marketing efforts will reduce and will be optimal for all the parties involved.

These strategic brand collaborations are highly effective way to build brands as entry into new markets become easier and brand awareness can be spread efficiently. Also, with respect to digital-therapeutics companies, which have capabilities in areas where many pharmaceutical companies lack such as big data, advanced analytics, hardware engineering, human-centred product design, and flexible business models. Such capabilities will be of immense importance post-COVID for pharmaceutical companies as healthcare would go digital. However, amidst this scenario, acquisition of such digital healthcare companies might not be an informed decision as significant investment, high-risk is involved with it. Hence best decision could be partnerships with digital-therapeutics companies instead. In this way, pharmaceutical companies will have to new technological capabilities while digital-therapeutics companies can benefit from getting wider access to providers and patients. Collaboration between digital marketing and life science companies will work all the more as the strategic and creative thinking of both of them are aligned. Such compatible partners will witness increased growth, reduced costs and a greater reach. As it is a collaboration and not competition, there is huge potential for rapid audience expansion as both brands can introduce their customers to their partners. Also, it is worthwhile to notice that many new customers can be reached out to through this collaboration, which otherwise might have never considered one single brand. So in a way, it is also beneficial for the customer as it increases value to the customer and enhances their brand experience.

15.Digital Promotion for Marketing & Branding

As clinics are mostly closed, stringent social distancing norms are in place, it gets difficult to promote brands to customers as it used to happen pre COVID. Amidst this scenario, need of the hour is digital promotion which aims to save costs and produce remarkable results. There are many options to promote a brand digitally some which are described below.

15.1 e-Detailing

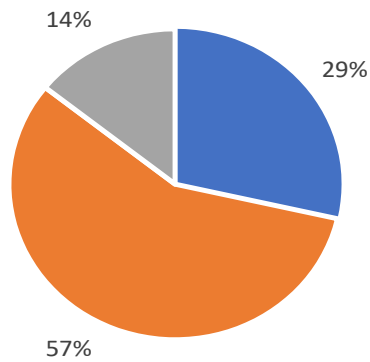
Amidst COVID 19, it could be highly risky for medical representatives to do traditional detailing using a detail aid or a visual aid. Hence, e-detailing is quite an effective and convenient method to sell products to doctors. Benefits of e-detailing include focussed engagement, better data capture as it is interactive and easy to glance through, facilitate highly target communications, content is stored in icloud to review it later and content updating becomes easier. Apart from this, e- detailing helps to identify “high prescribers” easily and focus on the. To strengthen the ideas mentioned, a primary research was conducted to understand doctor’s perspective of e- detailing. This research shows from the age group 25-40 years and 41-55 years are more receptive to e-detailing (different from traditional detail aid method) than the older age group 55-66 years. This could be of immense importance to build brand personality and form naming of the brand so that the physician is immediately able to recall the brand.

Ref: Annexure 4: Chosen a sample size (random sampling) of 70 physicians from pan India. Those physicians were segmented into age groups of 25-40 years, 41-55 years, 56-66 years. With hit-rate being 30% on average in all segments. They were identified by first, tracking prescriptions of patients who came to the chemist shop, secondly, through search of contact numbers and email ids from hospital websites, clinic appointment images on google. Such physicians were requested to answer a short questionnaire either in-person (following all social-distancing norms) or making cold calls to them, by seeking their permission. This study was conducted throughout a period of 15 days.

Exhibit 15: To illustrate physicians response rate as per age group, primary research

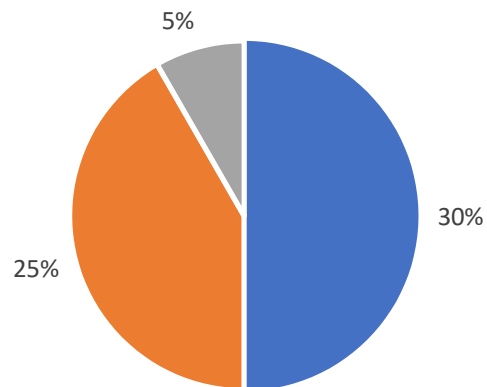
Top 3 repetitive response by physicians, 25yrs-40yrs

■ Less Time Consuming ■ Quick ■ Less Disruptive



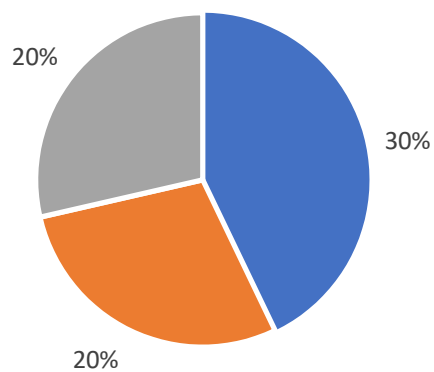
Top 3 repetitive response by physicians, 41yrs-55

■ Easy ■ Less Time Consuming ■ Satisfied



Top 3 repetitive response by physicians, 25yrs-40yrs

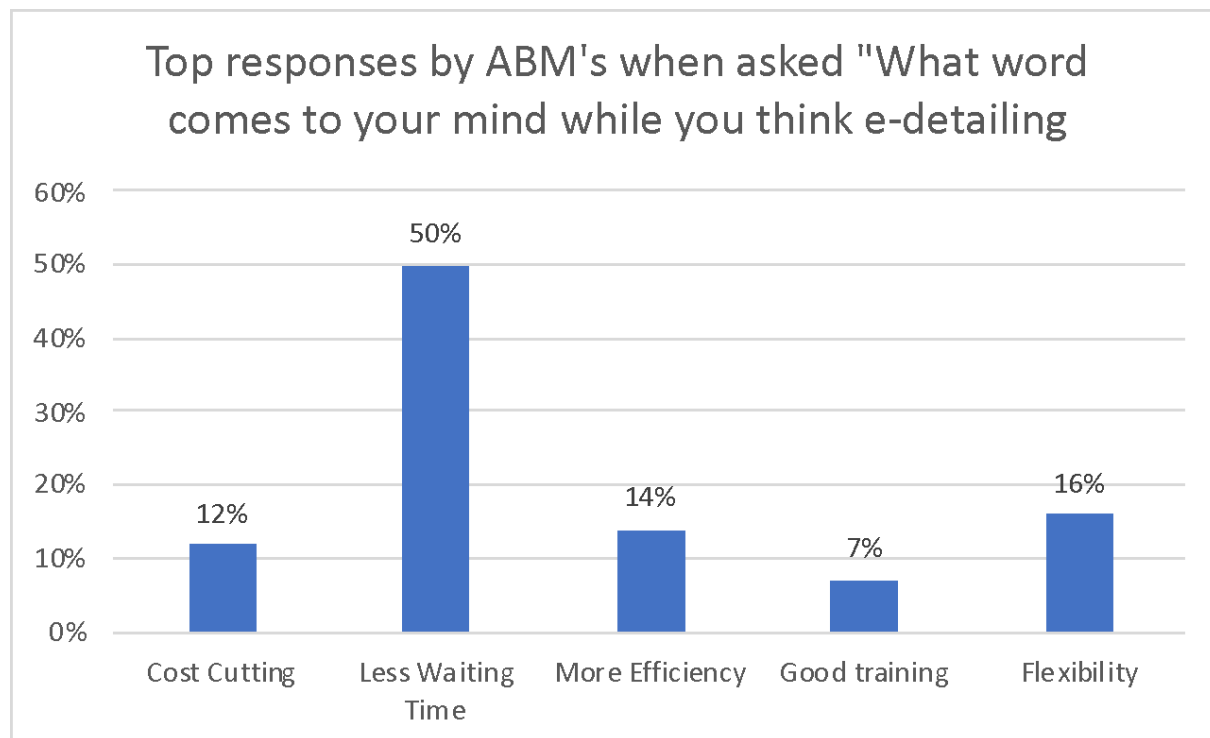
■ Time to get accustomed ■ Physical interaction is beter
■ Less disruptive to routine



The next primary research shows the perspective of Area Business Managers on e-detailing . Whereas 50% of the respondents, think of e-detailing as “less waiting time” and 16% and 14% think of e-detailing as flexibility and more efficiency.

Ref: Annexure 5: Chosen a sample size (random sampling) of 10 Area Business Managers (ABMs) through chemist contacts and personal contacts with hit-rate 90%. Post this identification, such patients were requested to answer a short questionnaire either in-person (following all social-distancing norms) or making cold calls to them, by seeking their permission. This study was conducted throughout a period of 10 days.

Exhibit 16: To illustrate Area Business Manager (ABM) response rate



Source: Primary research

15.2 Medical Apps

As the salesforce are unable to physically meet doctors and provide information about new products medical apps prove to be an effective alternative. These apps are preferred by healthcare professionals and chronic patients to collect information on medicines and doctors' services. Companies worldwide are launching "Pharma Apps" to educate doctors and hospital administrators about new products. Even in India many multi-national and other pharma companies in India are involving digital path to communicate to physicians and hospitals to market their products. These apps primarily contain information on new products, their efficacy and side-effects related matters and commission offers to doctors and hospitals. Manufacturing companies with many therapeutic segments launch separate apps for each product to share it with doctors who could become their 'prospective direct clients' without involving field personnel.

15.3 Digital Flyers

Digital flyers are highly effective to advertise products and services to physicians, especially during COVID where most activities are going digital. Digital flyers are highly effective because they are usually visually appealing which can quickly, succinctly promote the product or service to the customer. They are usually designed to be visually appealing by using specific images or icons, or a specific colour pallet to resonate the efficacy of the product or service to the concerned customer, all of it without having any chance of getting infected.

15.4 Digital Webinars

Webinars with doctors, KOLs, CMEs have always been great way to engage customers in the pharmaceutical industry. However, due to COVID when such physical interaction is difficult digital webinars can help to replace the void. Twokey benefits of digital webinars are that pharmaceutical companies can still hold on to their existing customers through setting up webinars once every week, promote new products, and keep engaging them about efficacy and effectiveness of the upcoming products. Secondly, meeting links can be sent to new customers to invite them for KOLs meeting. In this way, digital webinars can be both easy to reach to customers, less time consuming, and cost effective as well. For example, while, CMEs/FGDs used to cost the company Rs. 20,000 per quarter, now Zoom meeting can cost them Rs. 6,000 per quarter.

Conclusion

Post COVID 19, pharma building will indeed go digital with tele-medicines, e-pharmacy, med-tech companies coming up in more numbers. This is due to the convenience, flexibility, and user-friendly option that online platforms provide apart from being cost effective, which, in any case is of prime importance for any company. This convenience is not only from the company side, but is also from the physician side. Hence, brand building or promotional activities has to go digital for benefit for both parties. However, for such brand building through online platforms, medical representatives will have to learn a new skill of promoting products online. Also, telemedicine will definitely stay for long, however would also need further innovation to survive it for ever. Not only will doctor-patient relationship go digital, but pharmacies will also go digital to survive. Due to COVID, there has been high increase in demand for online deliveries of medicines due to maintaining less physical contact. Hence, e-pharmacies will be a great option for patients.

Further, in terms of competition between pharma giants and med-tech companies, best scenario will be to collaborate. This is due to high investment capability in pharma giants and high technological advancement capability of med-tech companies. This could serve as a perfect match to collaborate and be a “win-win” situation for both. Hence, it will be quiet strategic to not fiercely compete but collaborate. This will also be advantageous for both to acquire more customers and do effective brand building.

Annexure 1

Question: What were the major challenges faced by you during COVID 19?

Primary Research Methodology:-

Sample Size (Random Sampling): 70 patients

Hit-Rate 70%: 49 patients

Geographic Area: Kolkata

*Although a more extensive interviews could have been conducted but due to COVID 19 travel restrictions, survey was done only in hometown area

Way of Action: Chosen a sample size (random sampling) of 70 patients (whose medication intake is at least twice a week) with hit-rate 70%. Those patients (no age bar) were identified by tracking prescriptions as and when patients came to the chemist shop. Post this identification, such patients were requested to answer a short questionnaire either in-person (following all social-distancing norms) or making cold calls to them, by seeking their permission. This study was conducted throughout a period of 10 days

Response Way: Physical/Cold calls

Time Period: 10 days

Annexure 2

Question: Are you in favour of e-pharmacy?

Primary Research Methodology:-

Sample Size (Medication intake is at least twice a week): 70 patients

Hit Rate 70%- 49 patients

Geographic Area: Kolkata

*Although a more extensive interviews could have been conducted but due to COVID 19 travel restrictions, survey was done only in hometown area

Way of Action: Chosen a sample size (random sampling) of 70 patients (whose medication intake is at least twice a week) with hit-rate 70%. Those patients (no age bar) were identified by tracking prescriptions as and when patients came to the chemist shop. Post this identification, such patients were requested to answer a short questionnaire either in-person (following all social- distancing norms) or making cold calls to them, by seeking their permission. This study was conducted throughout a period of 10 days.

Response Way: Physical/Cold calls

Time Period: 10 days

Annexure 3

Question: How likely are you to renew your health insurance? Please choose from the following options.

- 1) Definitely Renew
- 2) Might Renew
- 3) May or may not Renew
- 4) Might Not Renew
- 5) Definitely not Renew

Primary Research Methodology:- Sample Size (Medication taking at least twice a week):50 patients

Hit Rate 80%- 40 Patients

Geographic Area: Kolkata

*Although a more extensive interviews could have been conducted but due to COVID 19 travel restrictions, survey was done only in hometown area

Way of Action: Chosen a sample size (random sampling) of 50 patients (whose medication intake is at least twice a week) with hit-rate 80%. Those patients (no age bar) were identified by tracking prescriptions as an when patients came to the chemist shop and already has some health insurance. Post this identification, such patients were requested to answer a short questionnaire either in-person (following all social-distancing norms) or making cold calls to them, by seeking their permission. This study was conducted throughout a period of 10 days.

Response Way: Physical/Cold calls

Time Period: 10 days

Annexure 4

Question: What word comes to your mind when you think of e-detailing?

Primary Research Methodology:-

Sample Size: 70 physicians Hit-rate (30%)- 21 physicians

Age Group:

25-40 yrs.- 13 physicians

41-55 yrs.- 5 physicians

56-66 yrs.- 3 physicians Geographic Area: Pan

India

Way of Action: Chosen a sample size (random sampling) of 70 physicians from pan India. Those physicians were segmented into age groups of 25-40 years, 40-55 years, 56-66 years with hit-rate being on average 30% in all segments. They were identified by first, tracking prescriptions of patients who came to the chemist shop, secondly, through search of contact numbers an email ids from hospital websites, clinic appointment images on google. Such physicians were requested to answer a short questionnaire by making cold calls to them, by seeking their permission. This study was conducted throughout a period of 15 days.

Response Way: Cold calls

Time Period: 15 days

Annexure 5

Question: What word comes to your mind when you think of e-detailing?

Primary Research Methodology:-

Sample Size: 10 Area Business Managers Hit-Rate 90%- 9 Area Business Managers

Geographic Area: Pan India

Way of Action: Chosen a sample size (random sampling) of 10 Area Business Managers (ABMs) through chemist contacts and personal and already has some health insurance with hit-rate being 90%. Post this identification, such patients were requested to answer a short questionnaire either in-person (following all social-distancing norms) or making cold calls to them, by seeking their permission. This study was conducted throughout a period of 10 days.

Response Way: Cold calls

Time Period: 10 days

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