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Building Healthcare Brands in the post-COVID 19 era

EXECUTIVE SUMMARY

This white paper aims to provide the readers with a deep insight into an Indian Pharmaceutical brand for a diabetic drug post COVID-19 with respect to its marketing efforts, patient centricity, and becoming a wholesome healthcare provider from its earlier approach of medicine suppliers. It also explains the recent revamping that has occurred in the pharma sector in terms of selling, marketing, and growth of the various brands.

INTRODUCTION

The healthcare ecosystem in India comprises of various caregivers at different stages like

preventive> diagnosing> treatment

Wellness and fitness industry, diagnostics industry, hospital sector, Pharmaceutical and biotech industries, medical devices sector, and the insurance sector.

Healthcare in India is 70% private sector dominated and comprises 1.3% of the GDP spending. The pharmaceutical sector was valued at \$36 bn in 2018-2019. The generic drugs form up to 71% of the market share making it the largest segment of the Pharma Industry. India also plans on funding up to nearly 1 lakh crore to companies to manufacture pharmaceutical ingredients domestically. This in turn acts as a driving force for many Indian companies. There are ample growth drivers to thrive in the Indian Pharmaceutical sector like medical tourism, infrastructural development, strong drug manufacturing capability, domestic demand, and new facilitation from the Government for innovation and R&D.

Considering the above scenario, everything was going smoothly for the healthcare sector, however, this year marked the arrival of the largest pandemic in recent years and took almost all the industries to a downfall and presented them with unforeseen challenges. With the nationwide lockdown for months, it became difficult for companies to operate and the only industry to work 24*7 even in such a scenario was and still is the Healthcare industry. Along with the hospital sector, the other largest contributor in fighting against the Covid-19 virus was the Pharmaceutical sector. With the increasing demand for drugs like Remdesivir to even common painkillers and sanitizers the Pharma industry kept thriving and aims to do so for years to come. However, this paper tries to shed light on the after-effects of the COVID-19 and how the companies tweaked their conventional practices to fit the recent challenges and also suggest ways that can be adopted by the companies to establish a deeper connection with their customers ie the patients, doctors, retailers and build their brand in doing so by taking the help of a diabetics brand.

With the arrival of Covid19 the doctors shifted to tele and video consultations, hospitals started adopting video monitoring of patient recovery and check-ups, the diagnosis became less invasive and more point of care diagnostics came into the picture, pharma selling took a digital route and ancillary services, patient-facing mobile apps and digital platform integration were seen to have taken place. The patients have become more learned and are now expecting answers more than ever before.

When we consider a mid sized pharma company, it has a relatively smaller market capitalization compared to big players however they have scope for

growth and are more agile to undergo rapid modifications. We will look into these details in the further scope of the paper. We would also delve into how the midsize companies plan to increase their market base by taking efforts in selling and marketing their brands through digital advocacy and taking initiatives in the patient care domain like establishing portals for patient support, patient education, and direct patient selling, efforts to increase patient adherence to a treatment regimen with the use of AI and counseling patients by pharmacists.

Post-reading this white paper, the readers would have a thorough idea of what the mid-sized Indian Pharma companies are currently doing to build and grow their brands and what they can additionally do.

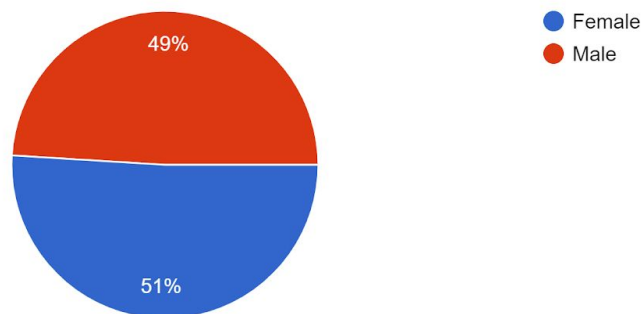
PRIMARY RESEARCH

Research Objective: To understand the perception, expectation, and satisfaction of the patients from the service and treatment given by the pharmacist and doctors and to establish their understanding of telemedicine

Research Methodology: This research aims to gauge qualitative and quantitative data from the patients through questionnaire format. A google form was floated among people from all age groups throughout the country from tier 1 and tier 2 cities. 153 responses were collected.

Data analysis:

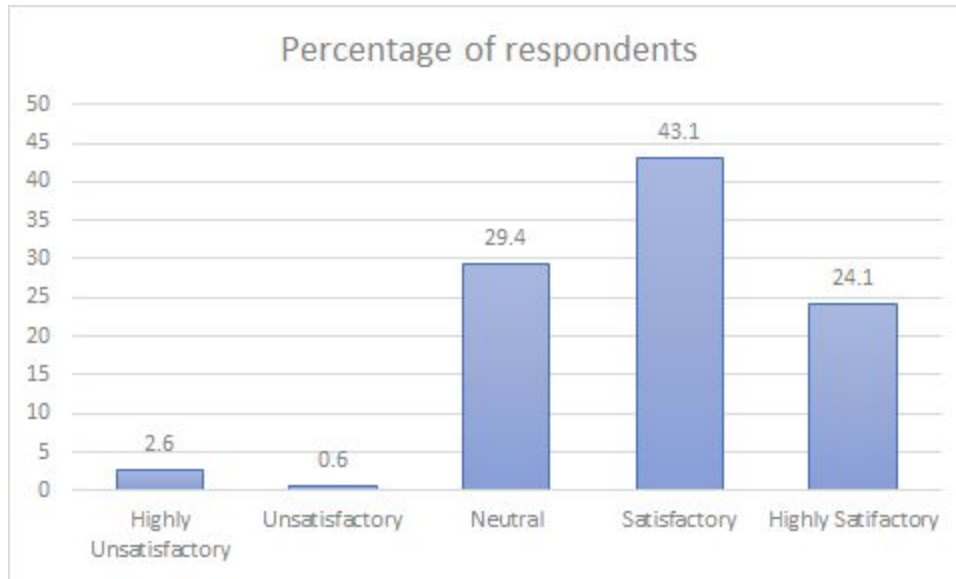
The population had an almost equal distribution of females and males.



About 52% of the patient population consisted of the age group below 25 years of age.

It was also found out that in case of the absence of any prevailing disease or disorder, people visit doctors once in 3-4 months.

The graph given below shows the level of satisfaction felt by the respondents from their doctor consultation visits with respect to the time spent by the doctor with them.

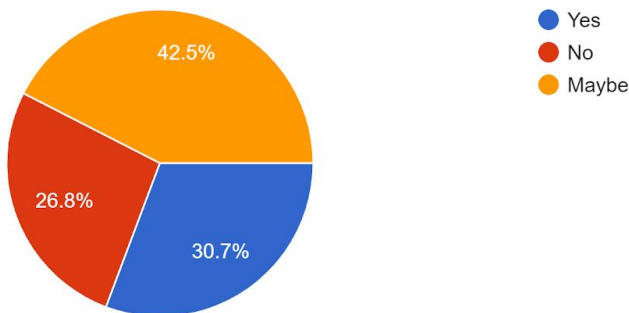


While 43% of the respondents felt satisfactory about 30% of the population felt the time spent during doctor consultation was neutral. Which shows there is a gap that can be addressed.

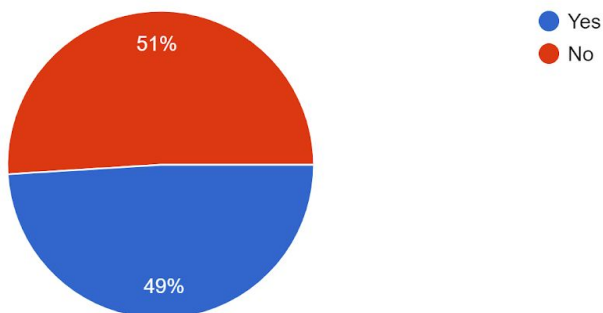
Next when asked about if the doctor explains the conditions and causes for disorders about 20% of the respondents said No, and further added, “depends on time and if asked”

Next, when asked if their doctor explains the side effects of medication and the necessary dietary regimen to be followed, a striking 55% of the respondents answered No.

Now coming to the importance of the role of the pharmacist, when the respondents were asked if the drug prescribed by the doctor isn't available at the pharmacy store and the pharmacist offers a substitute, would they take that, to which about 73% of the respondents gave a positive inclination. Refer to the graph below.



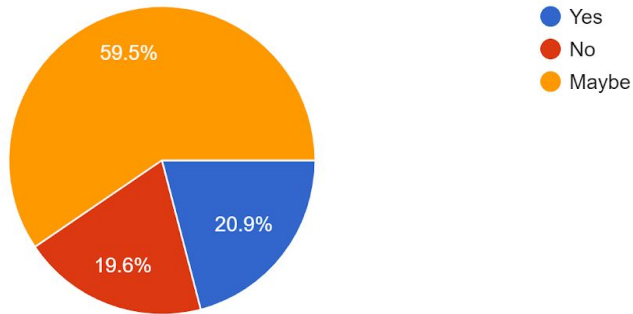
Then we asked if their pharmacist explains the prescription and dosage to them, for which the respondents were divided as follows.



However, it was found out that 96% of the respondents felt that patient education about treatment therapy, doses, and side effects is of utmost importance by the doctors as well as the pharmacists.

This research also aimed to find out the understanding of telemedicine within the target population and their preference for the same.

The respondents were asked if they consider telemedicine to be convenient and reliable in the future times, the following pie chart gives their responses. About 80% of the respondents were positive about it.



Further, we asked them if they would themselves use telemedicine platforms, to which 43% of the respondents said yes and 51% of respondents were neutral and would look for additional features and decide.

Conclusion and Key Takeaways :

From the primary research that was conducted, we tried to understand the patient's point of view and their experiences with the two core healthcare service providers ie doctors and pharmacists. This data would actually help in building the brand as the company can focus to address those gaps and act as a mediator to make their service more patient-centric giving more offerings to the patients. The research has shed light on the importance of patient education in terms of the disease, cause, treatment regimen the necessary do's and don'ts, side effects, and steps to mitigate the adverse reactions if any. Due to the increasing population of patients these days, the doctors aren't able to spend quality time with every patient, hence the companies can build a patient counseling platform of their own. This would be done by integrating the Pharmacist - Doctor and the patient together.



[IMAGE COURTESY: GOOGLE]

Branding a diabetic brand post-COVID 19

Even if the primary research was conducted for a generic treatment, the results are similar, infact much more applicable for a diabetic patient. Diabetes mellitus is a metabolic disease that causes high blood sugar. The main function of insulin is to move sugar from the blood into the cells to be stored or used for energy. However, a patient suffering from diabetes, doesn't make enough insulin or can't effectively use the insulin its body does make. This high blood sugar from diabetes if not treated can cause serious medical complications by damaging nerves, eyes, kidneys, and other organs. There are various types of diabetes, and each type of diabetes has unique symptoms, causes, and treatments. But this condition can be managed with medications and lifestyle changes. Thus it can rightfully be said that medication is just a part of treatment and not a wholesome approach for treatment. [1]

Developing and implementing a pharmaceutical care model in an ambulatory care setting for patients with diabetes.

This study was a coordinated-care program at a Regional Diabetes Centre, a study was conducted monitoring groups of people. The control group received the standard pharmacist instruction whereas the two treatment groups received additional small group or individual supplementary education for a 2-month period.

This evaluation included assessment of blood glucose monitoring of each individual and responses on a pre-test and post-test questionnaire. The treatment groups demonstrated significantly lower average weekly blood glucose levels and a decreased incidence of hyperglycaemic episodes when compared with the control group.

The treatment groups demonstrated a significant increase in patient understanding of diabetes medications and medications for associated illnesses, an increase in knowledge about blood glucose monitoring, and a positive difference in perceptions/attitudes toward diabetes. This approach is consistent with the concept of pharmaceutical care in which the

pharmacist helps patients avoid long-term complications and thus improve their quality of life. This hence focuses on the crucial aspect of patient education and counselling with should be seen as supplementary and not complimentary. [2]

A second study was also conducted which shows the importance of dietary regimen and various restrictions that need to be adhered by the patients and the impacts it has.

Defining the Delivery of Nutrition Services in Medicare Medical Nutrition Therapy vs Medicare Diabetes Self-Management Training Programs.

For a patient with diabetes lifestyle changes & dietary restrictions are of the utmost importance.

Hence for the care for patients with diabetes, Registered dietitians (RDs) have a defined and unique role that differs depending on whether the service is for medical nutrition therapy (MNT) or part of a diabetes self-management training. [3]

Doctors treat diabetes with a few different medications. Based on these studies we can see that not only the medication, but patient care & education is of the utmost importance.

But a content marketing strategy doesn't create itself. It's the result of clear intention, careful planning, and focused execution. [4]

So, in order to rebrand a product an additional effort to make a mark on the patients as well as doctors prescribing them is required.

In a post COVID-19 era, with diabetic patients being at high risk, additional precautions have to be taken concerning their health.

As a pharmaceutical company launching a diabetic drug in the market, we have decided to also launch additional educational programs which will be made known to the customer/patient on the pamphlet inside the box of medication, which can be accessible by registering with our company.

Since diabetic medications are a lifelong therapy. The patient registering will also be sent reminders for refill, which can be directly sent to their

address. This will be made possible with tie ups with neighbouring pharmacy stores.

In this case, the patient won't have to step out at the end moment in case the medication is over.

An app based or email-based reminder can be set to monitor blood sugar levels & as well a pill reminder.

How can a brand be made more patient centric? [5]

In recent times there has been a lot of buzz in the Pharmaceutical market about becoming Patient centric, however the improper understanding of the term and poor implication and application of strategy, doesn't give the desired results.

Patient centricity is empowering the patients to choose as they desire. It is not about marketing the brand to the patients or engaging the patients or their compliance. But an efficient patient centricity, enables these outputs engagement and compliance can make the brand patient oriented, but not patient centric in a customer centric approach, one takes the customer suggestions, wants into consideration and aligns the strategies of the brands accordingly.

Customer in our case the Patients centricity can be brought about by following aspects,

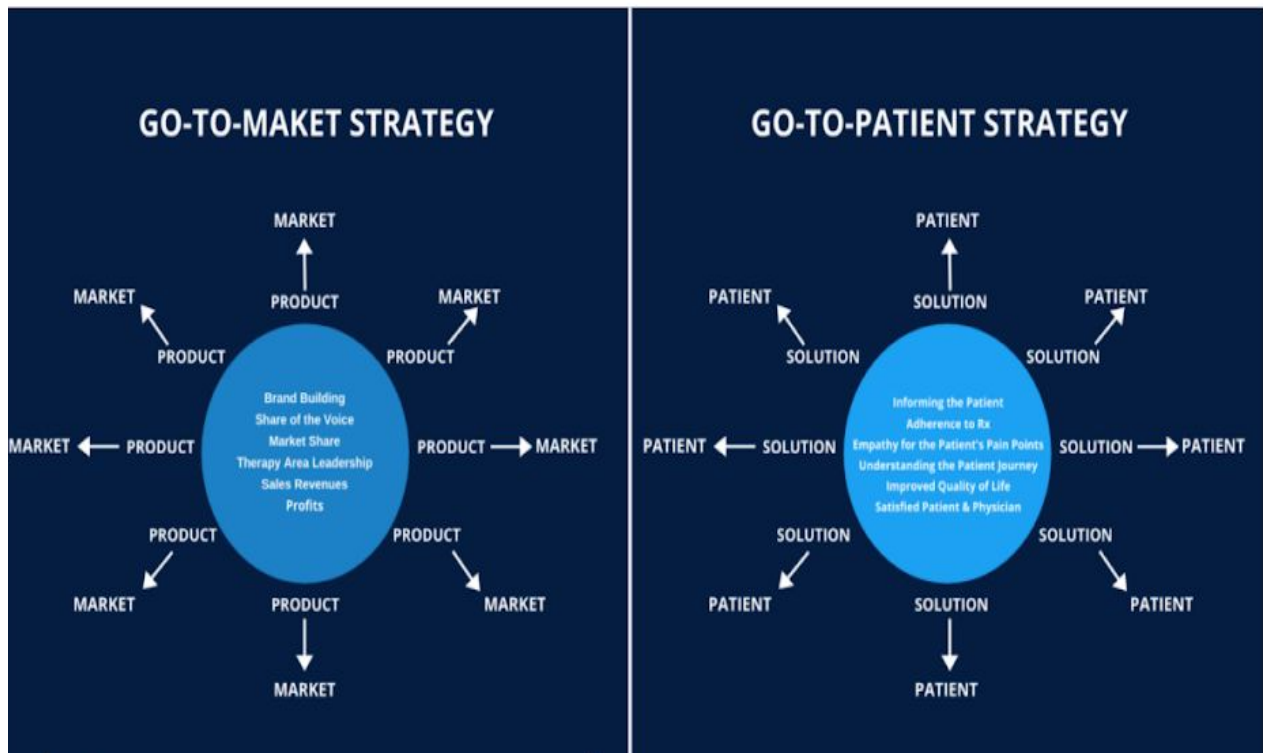
1. Customer focused leadership
2. Understand your customer
3. Empower the front line (medical reps)
4. Design the experience
5. Continuous feedback and improvements

Asymmetric information flow is the biggest challenge of the pharma industry, and so the only information patients have for comparison is the price point and the data available from Google which is unreliable. If price sensitivity of consumers is pharma's greatest challenge, why can't pharma think seriously about patient centricity which can create transparency and trust in a consumer about a company and its products and services? Won't

services that create such trust in consumers empower them more?
Won't such empowerment make them advocates of pharma's products?

Post COVID 19 era there would be people who are much more informed and who are much more conscious and well aware than before and would want to be well informed of their treatment, medication and therapy. Thus in such times, the brands must focus on having a patient centred care based on the following principles.

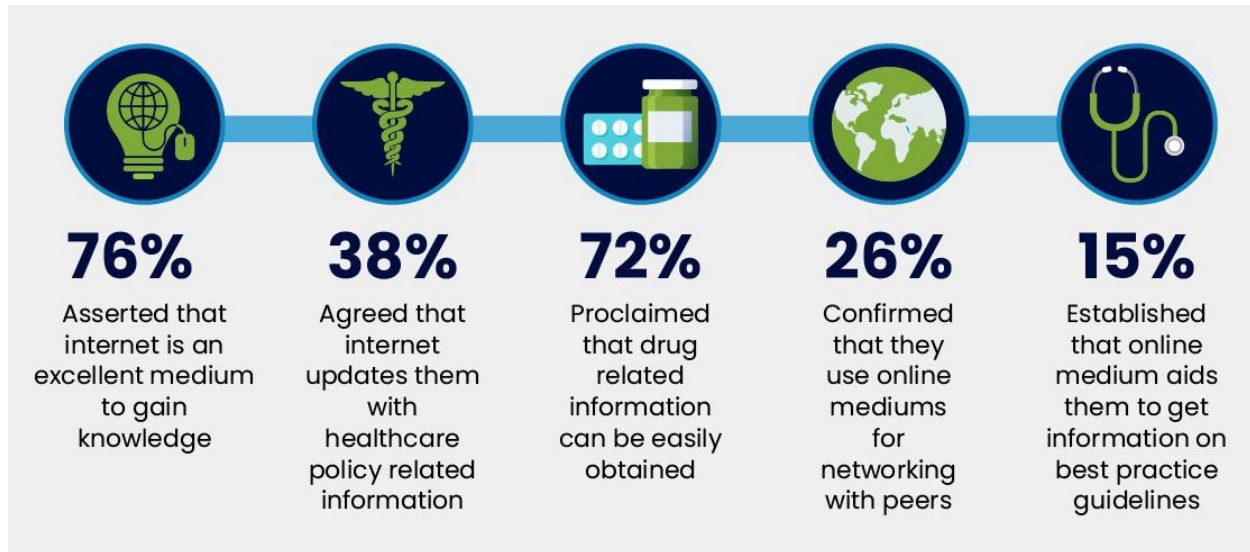
1. Respect for patient preferences (transition of gelatin animal based capsules to agar agar capsules)
2. Coordination and integration of care (using insights of the medical representatives to understand on ground realities)
3. Information and education
4. Physical comfort
5. Emotional support (Sun Pharma while it was in a small start up phase started support groups for Parkinson's Disease in 8 cities where physiotherapists and doctors met every fortnight, today the Syndopa has 90% of market share)
6. Involvement of friends and family
7. Continuity and transition
8. Access to care



A sustained relationship with a trusting and loyal consumer group what every company in the world seeks. Hence it is important to break out from the concept of focussing on quick sales. Sending discount coupons or the occasional disease awareness leaflet to an aware and empowered consumer is more an insult to their intelligence than a service. Hence in our case a diabetic brand can focus on becoming a go to destination for the patients health needs and the sales can become the by product of such a symbiotic relationship.

In recent times a major proportion of knowledge and insights are gained through the doctors and pharmacists at the stores. Hence optimisation of these forces is of utmost importance. With that, it has also come to the notice that if a doctor spends 40 hours a week on acquiring information, they are dependent on MRs for only 35% of the time. The primary source of information includes digital channels at 83%. A high number of doctors prefer online media for knowledge acquisition. Digital platforms are the go-to place to read about the latest drug molecules and related information.

A significant number of doctors rely on online sources to stay up-to-date with industry best practices and policy guidelines.



[IMAGE COURTESY:

<https://www.amuratech.com/blog/the-new-rules-of-doctor-engagement-in-the-new-normal>]

Since the pharma industry is adopting tech-enabled activities for pharma marketing, they also need to understand doctors' preferences in terms of content. Pronto Consulting's research analysis with HCPs in June 2020 highlighted that 33% of doctors wanted to reduce webinars and 41 per cent of doctors felt that webinars have no relevance or significance. Thus profiling of doctors based on the content and channels they prefer is needed.

Following points can be focused on while branding a diabetic product using digital marketing in pandemic times:[7][6]

1) Value driven content creation

Providing answers to common patient pain points in an engaging way with transparency will help grow the brand audience indirectly while fostering trust and positioning the brand as a thought leader. Through online communities, mobile applications and a wealth of web content,

patients can have wide access to a range of pharma-based insights and relevant information.

2) Conducting ad campaigns

The pharma industry being a highly regulated one, the ad campaigns have to be designed carefully. We can build a campaign around a particular disease condition or topic, develop an emotive message that will encourage a wealth of user-generated content, using a well-crafted hashtag as a vessel for social sharing.

3) Use of augmented and virtual reality

These technologies place people at the heart of the business and can offer information and care through virtual clinics and product demonstrations.

4) AI-powered assistants and messaging apps

This trend presents a unique opportunity to hold personal conversations with your customers, patients or partners. The use of chatbots in communications across social messaging will result in a rise in customer experience levels and provide valuable data to help improve strategies, communications and products.

5) Launch programmes

Launching several programs aimed at getting more patients with diabetes screened and into treatment, to educate patients who already know they have diabetes about how to manage the disease.

6) Virtual Detailing platforms

It provides an interactive and real-time online meeting between sales reps and healthcare professionals.

7) Holistic telemedicine platform

Such a platform can be a repository of doctors for patients to book appointments, e-meetings and consultations with them. Technologies that come integrated with telemedicine software like electronic

medical records, AI diagnosis and medical streaming devices, can better assist providers in diagnosis and treatment

8) Content marketing portal

Creating a portal, exclusively for doctors, with information about relevant medical news, clinical reference, education, the current market scenario, etc. would help create a community of engaged doctors. By sharing therapy-specific content, doctors would be able to share this information with peers or customers.

9) Hyper personalised omni channel mix along with hybrid sales model

Pharma companies need to differentiate themselves by delivering personalized, evolving experiences consistent across channels. Omnichannel medical marketing for doctors centres around healthcare professionals delivering the messages in the format they need, in the way that's most convenient to them. By leveraging customer relationship data, the professional's personalized videos can be created, thus increasing their engagement and the possibility of conversion. With the increased utilization of technology, sales reps can take on a more evolved role. Instead of being the single face of the company, reps can be just one of the many ways a pharma company communicates with a doctor.

Some facts to support going digital with diabetes patients are:

1. The average diabetes digital consumer journey lasted 42.4 days, with activity increasing steadily throughout
2. There are 5 moments in the diabetes search journey path:
 - a. Condition research. "What does type 2 diabetes mean?"
 - b. Symptoms. "Diabetes symptoms"
 - c. Treatment. "Treatment for type 2 diabetes"
 - d. Side effects. "Side effects for x medication"
 - e. Ongoing support. "Financial support for (diabetes brand) medication"
3. Non-brand terms are clicked more often earlier in the diabetes patient search journey, and brand terms got most of the last clicks (the conversion) in the journey

This is important news for brands so that your brand gets the click instead of your competitor – you need to be showing up with helpful, educational information when that's what's needed

How doctors can be engaged using digital marketing to increase brand recognition:[8]

1. Important details such as doctors profile , consultation timings, health departments, courses of treatment, reviews and procedure to fix an appointment can be set up on behalf of the company for the doctor
2. Provide doctors with resourceful emailers which they can send to patients. Email marketing is yet another effective approach when it comes to digital marketing for doctors. Resourceful emailers will help the practitioners connect with their audience at a more personal level.
3. Rope in Key opinion leaders to make informative videos about diabetes care.Engaging videos generate 1200% more shares than images and texts combined. They help build credibility and authenticity for the brand with the doctors.
4. Sponsor Google's pay-per-click advertisements. It enables you to display ads only to those who are using the keywords that you have targeted. This allows you to avoid the general public and target the apt people which is beneficial for the diabetologist as well as the brand.
5. Create google my business web page and directory listings for the doctors, this can initiate brand loyalty amongst doctors.

CONCLUSION

Highlighting the need of technology adoption in pharma marketing, SV Veeramani, CMD, and Former, National President -IDMA said, “COVID-19 is teaching us on how to carry on business without much human interaction and the great need for digital marketing. There is a need for rethinking promotional ideas and new styles in marketing and sales. There is also a need to combine both physical and digital marketing.” If the physical sales force is the army, the digitalisation and online content can become the navy and for a successful defense strategy both these forces need to be working efficiently.

In conclusion, the COVID-19 gave various challenges to the Pharma sector but it had managed to emerge victoriously, the smooth transition to digital marketing along with a wholesome approach of patient centricity would lead to sustainable growth of the brands. From here on, the patient would be seen at the heart of the ecosystem and there will be a doctor-patient-pharma integration which would lead to holistic results.

ACKNOWLEDGEMENT

We would like to thank Brand innerworld, for providing an opportunity to students of management colleges and working professionals to write a white paper and collaborate with each other. The transfer and sharing of knowledge has been of great use for all of us and the course of writing a white paper has helped us in gaining deep insights of the Pharmaceutical industry and how the Covid-19 pandemic affected it.

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PRIMARY RESEARCH METHODOLOGY

A questionnaire containing both open ended and close ended questions was floated amongst people throughout the country from various age groups above 20 years of age. Google forms were used as means for questionnaires. 152 responses were collected.

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