



Building Healthcare Brands in the post-COVID 19 Era

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Executive Summary

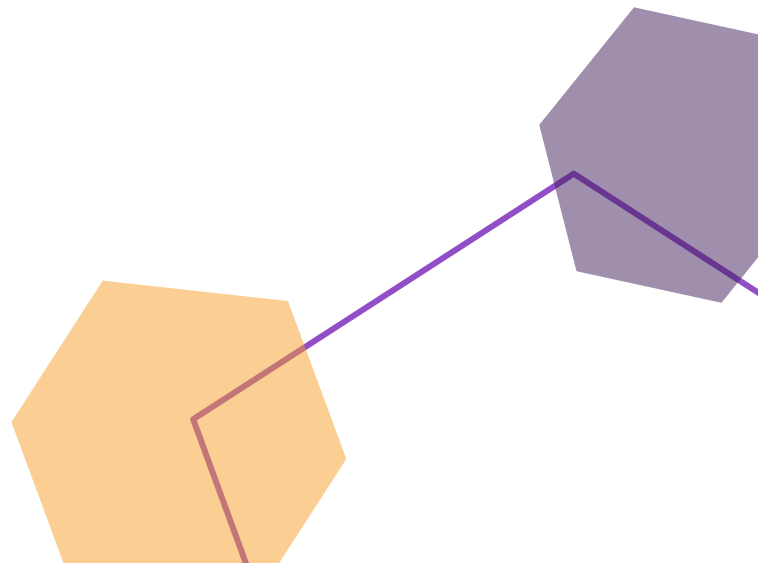
How do you plan for 2021 when a post-COVID-19 “new normal” has yet to be established? Annual brand planning can be one of the most harried, hectic, and highly charged times of the year – and that’s without a global crisis of the scale that the COVID-19 pandemic has presented. Collaborating across internal stakeholders and agency partners requires deft, thoughtful coordination, even in the best of times.

To plan successfully in the current environment, teams must first “plan for planning” by setting clear expectations and leveraging the right technology to enable effective collaboration; then, balance being thoughtful and exhaustive with working rapidly in a consolidated timeframe; and finally, develop multiple scenario plans for 2021 that make it possible to pivot nimbly and progress despite ever-evolving dynamics.

Today doctors do not want to meet Medical Representatives (MRs) more than once a month, one of the reasons being the corona outbreak and also that most of the doctors have easy access to websites on Healthcare Digital Marketing and Pharmaceutical marketing to learn about new drugs. Most doctors are already aware of the drug information that the MR provides. Therefore, the doctors now expect MRs to go beyond the basics and deliver higher value to their practice. With rising focus on evidence-based medicine and personalized treatment plans, doctors are hopeful that their next meeting with MRs involves a more scientific dialogue with complete and deeper understanding of the drug.

With scientific and technological progress, medical advertising, digital marketing for doctors and digital marketing for hospitals in the forefront, it is imperative for pharmaceutical companies to indoctrinate a change on how MRs engage with the medical community. Pharma companies need to come up with a comprehensive digital media plan that also integrates with their field force activities.

Pharmaceutical product marketers need to act fast and reduce the gap between what doctors expect and what MRs offer. They must understand how the Indian healthcare sector is changing and how this is altering the Doctor-Medical Representative relationship. New strategies require to be devised to keep the sales force relevant and updated in the competitive digital media markets



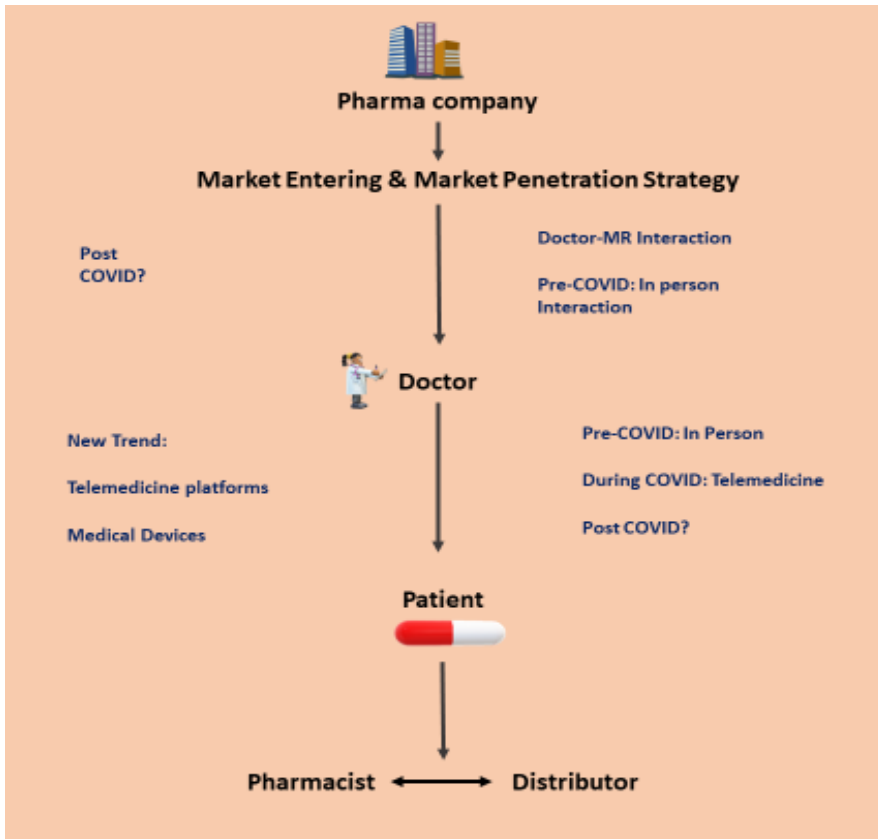


Introduction

Pharmaceutical industry always plans for long term branding strategy for their product as 90% of sales are generated on prescription-based drug globally. The global pandemic has transformed society and everyday life, directly impacting consumers' media consumption patterns and preferences, as well as their decision-making process as it relates to healthcare. In-person interactions have sharply declined, for patient-HCP and also salesforce-HCP interactions, forcing pharma companies and their marketing partners to take another approach to communicating product benefits and facilitating prescriptions.

The pandemic brought a paradigm shift as pharma became the most active in the digital space with innovative alliances and partnerships. Although the trend is guided by the sentiment of traditional marketing suddenly coming to a screeching halt, it made pharma brands test the 'digital' waters during the new normal. Only by diving in they could have understood what value the realm of digital holds for them.

Due to COVID-19 sales of top therapy have decline drastically by around 25-30% specially for Anti-infective, respiratory, analgesic, derma etc. As traditional marketing takes a hit due to the COVID-19 crisis, pharma brands are devising and adopting digital strategies to reach out and communicate with customer and end consumer. Branding is powerful tool that provides a plate form to build a relation with customer on an individual basis. It also provides significant competitive differentiation and influence behaviour and attitude of customer.



- Challenges Faced due to COVID-19
- Continuing timely diagnosis and treatment
 - Helping patients and healthcare professionals (HCPs) remain informed and supported
 - Ensuring access through affordability, supply, etc.
 - Maintaining and improving adherence
 - Driving market share, NBRx, and market growth in a new normal



Market Entering and Market Penetration Strategy

Top 5 points to be considered by Pharmaceutical company before launching any New Brand in market:

- 1) Disease Burden or Growth in Segments.
- 2) Demographic Analysis
- 3) Competitors Analysis
- 4) Molecules –
 - i) New Molecule
 - ii) Combination therapy
 - iii) New Formulation
- 5) Segmentation, Positioning and Targeting

Disease Burden or Growth in Segment:

It is important to understand Growth rate of any segment (Chronic and Acute) and Growing rate of Disease in Country before launching any Brand. Currently, Chronic segment is growing really fast as compared to Acute, mainly Cardiac and Diabetic therapy. COVID-19 has created a huge impact on Disease burden. Corona virus leaves a huge impact on Lungs mainly in elderly patients thus, Scholars are estimating growth in the number of severe Respiratory diseases. This increase in the patients of Respiratory disease can be an opportunity for Pharma company to enter into New Market. Understanding growth rate of different segments is the first step in brand planning.

Demographic analysis:

It is important to understand Age group, Gender and Economic status of your potential customers. As few diseases are more prone to certain Age group of people. E.g. Cardiac disease and Diabetic are more prone to age group of more than 30 years, While Child Asthma is for Age group of less than 10-15 years. Such data will be helpful before entering in Market. Gender and Economic status are also important parameter to analyses. E.g. Breast cancers mostly appears in women while Fungal infection are mostly appearing in slum areas. Thus, Demographic analysis is important to understand your potential consumer base.

Competitor analysis:

Competitor analysis is most important before entering into any market. It is important to analyses who are the top 10 companies in your targeted segment with higher market share. Top 10 Brands in your segment and their future growth. It gives a brief idea about type of market (Monopoly, Oligopoly etc.) which is helpful in bring innovative strategy in New Brand. Understanding your customer, their products and strategy is important factor of marketing.



Molecules:

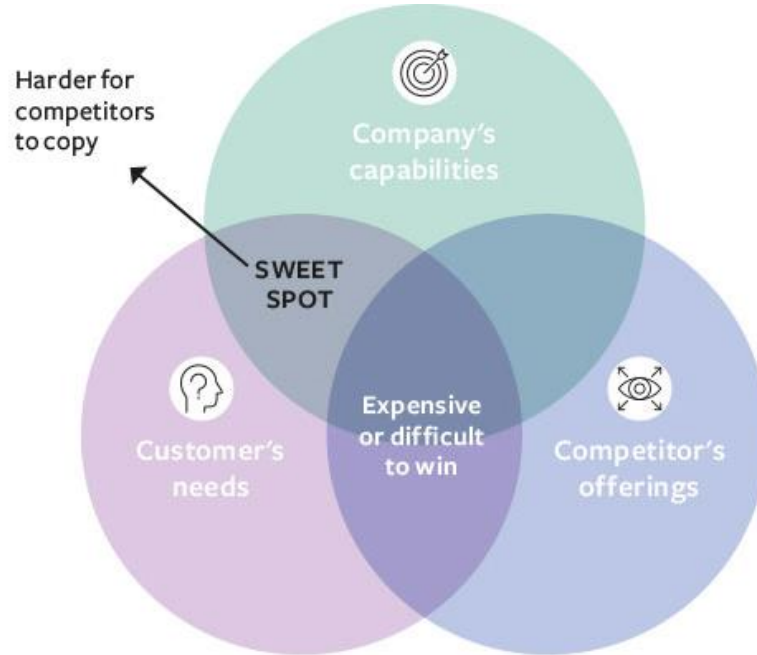
For each therapy it is possible that there are 6-7 or more molecules are present in market. Thus, before launching brand it is important to analyses Which are the Molecules are present in market? Which molecule is having highest market share and market growth? What types of molecules i.e. Plain or Combinations therapy growing in market? This will help brand to come up with innovative combination. For existing Brand, it will help to do Line extension. While for New brand it will help to come up with new Formulation to enter into Red ocean market.

Segmentation, Positioning and Targeting:

Segment: After all Data analysis Brand new to decide the Segment that they are focusing on (Chronic or Acute) along with therapy that they focusing on.

Positioning: Positioning must be such that it will create competitive advantage. It can be based on Indication, therapy or dosage.

Targeting: For Chronic segment brand need to target Specialty of doctors and for Acute segment brand should focus of Consulting physicians and general physicians for better reach and penetration into market.

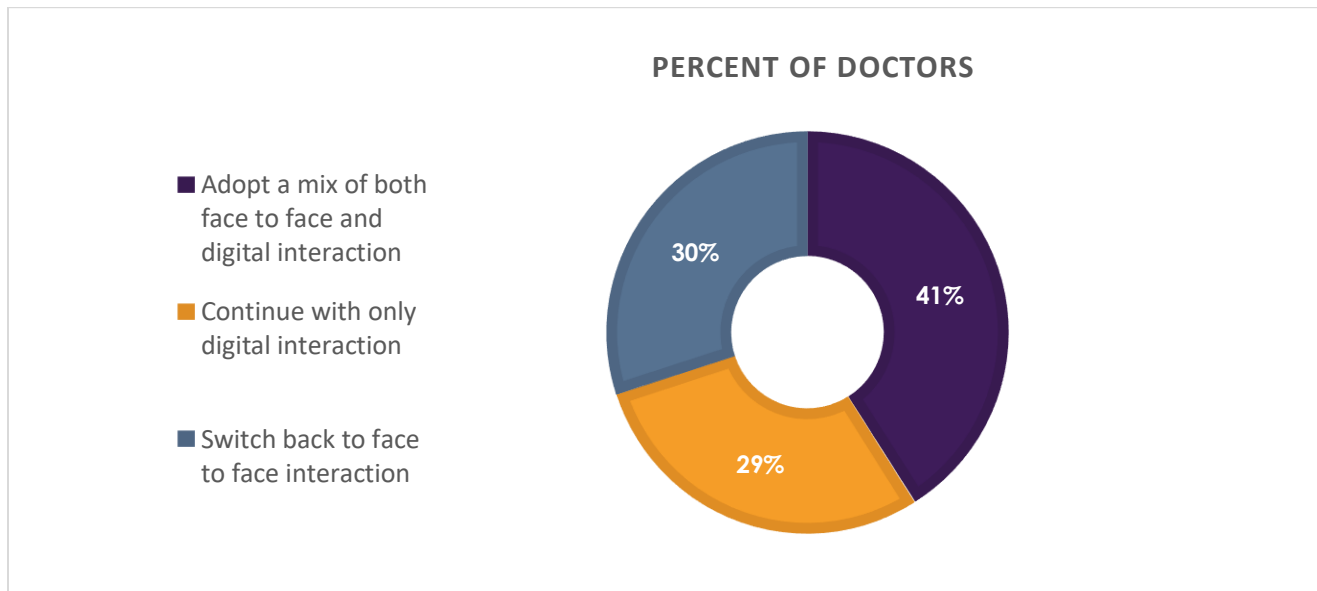





Customer Behaviour

Understanding the customer behaviour in and out is very important for creating a long-term brand trust in their mind. According to Survey conducted by IQVIA 2020,

- Post lockdown, doctors would prefer to adopt a mix of both face to face and digital interaction with pharma companies



- Medical representatives can physically visit the doctors once in a month and for once can connect digitally through calls or messages.
- Some doctors who are not active digitally or may have network problems and are potential, should be visited physically without fail.
- If product is newly launched then, physical visits are necessary at the initial stage.
- The most preferred forms of digital engagement post lockdown with sales representative is found to be



78%

Receiving useful content through WhatsApp, SMS, online

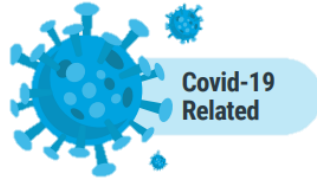


53%

Interacting with sales reps and marketing teams through platforms like WhatsApp, email etc.



- Information and services that doctors would like to seek post lockdown from pharma company



- **69%** Information/scientific update on new drugs
- **44%** Clinical trial data
- **36%** Indications related

- **53%** Information on latest development in diagnosis of Corona Virus
- **40%** Live update on health situation in my area
- **32%** Information on latest drug development of Corona virus

- **70%** Provide free gloves and masks
- **46%** Provide free online information to share with patients
- **34%** Provide door delivery of drugs to patients

- Data shared with doctors through MR's should be up to the point and crisp.
- GIF's and Short templates with contents related to the product can be created and shared through WhatsApp, once in a week
- Recent development in diagnosis of Corona virus, updates on health situations, latest drug developments. This can be shared with doctors through webinars.
- Topics of webinars should always be new and should add value to doctors knowledges and should not be repetitive. As most of the doctors have an complaint that the topics of webinars are repetitive and are not interesting as they are already aware about the information shared.
- Companies should engage doctors into activities by providing PPE Kit, Masks, Gloves, sanitizers, clinic sanitization facilities.



- Doctors interaction with patients during lockdown is mainly through phone calls and WhatsApp however, post lockdown nearly half of the doctors see themselves interacting face to face with patients



Brand Personality

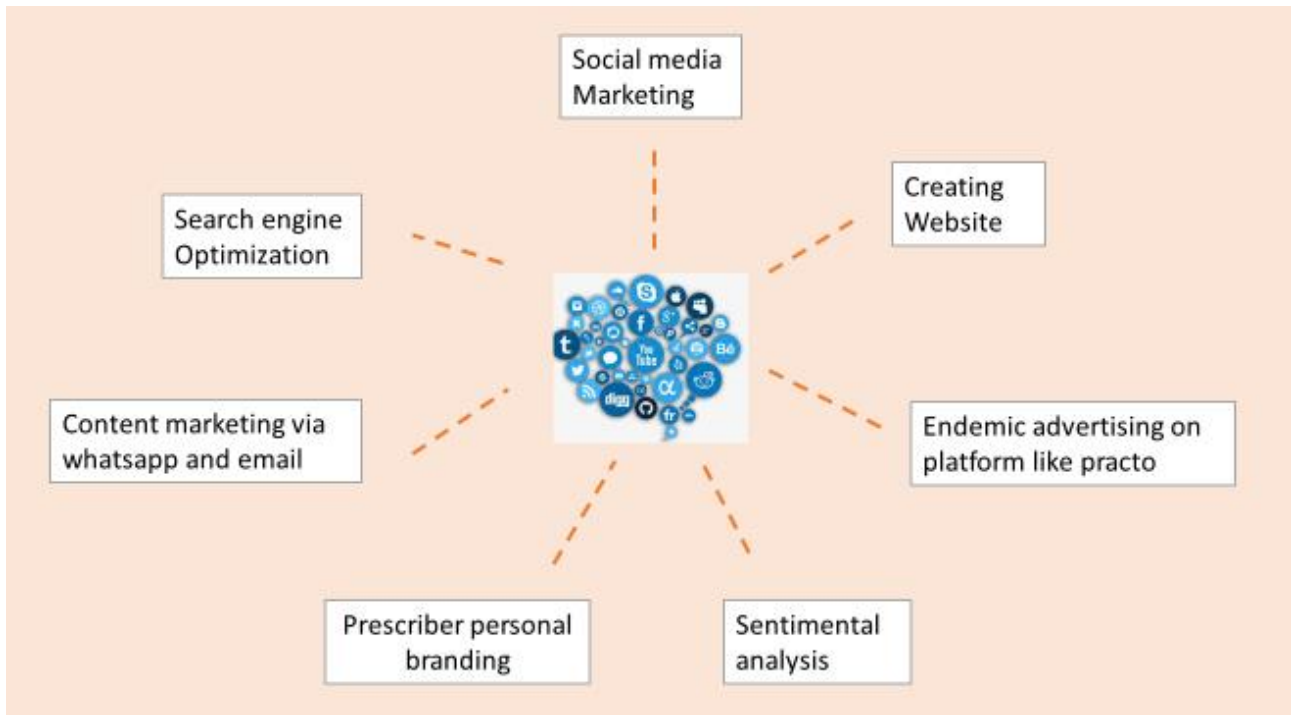
A powerful brand is that which attract customers loyalty and can be greatest source of wealth for a business. Brand personality is built on emotional appeal of brand and is the medium through which these, in advertising or visual identity are expressed. Hence it is important differentiating factor in positioning brands. Due to Covid-19, the consumer is more concern about their and their family safety. So, the brand can use various digital media strategy to reach out its customer and ensure their safety and care.

From a consumer perspective, prescription drug brand personality may make health-related issues more approachable and less intimidating, facilitating physician-patient interactions by making patients more familiar with the medications used to treat



Media strategy

To build brand in healthcare, digital platform has become mandatory. Following are various engagement strategy a company can use to increase its brand recalling:



- OTC Products: Promoted through television advertisements should have emotional connect as masses have become more health conscious towards themselves and also their families.
- Prescription brands: Disease awareness can be done through short films or awareness campaigns like "Berok Zindagi" and also through social media influencers as children have become more concerned towards their parents.
- For example: In case of diabetes, do's and dont's for diabetic patients, diet plan can be shared through social media pages
- Consider **"re-launching"** of the product. This may be an opportunity to simplify the brand's value proposition, prioritize the HCP and patient targets, and orchestrate tailored communications across channels. Drive sales post-COVID-19 with an evolved marketing mix. Targets and segments need to be analyzed to determine which will produce the highest return. Brands will be asked to prioritize targets and channels. Channels need to be scrutinized to determine which will produce the highest ROI and which can scale, as well as how messaging can be orchestrated across them. Having data allows brands to make informed decisions and develop multiple scenarios. Those that use data will differentiate themselves in the marketplace in 2021.



- **Use – but don't overuse – digital outreach** HCPs are already complaining about email overload. Investigate how to establish reach and frequency governance across brands and channels; how to establish response thresholds that indicate growing non-responses and opt-outs and adjust accordingly; and how to incorporate testing and agility to ensure optimization.
- **Make the most of technology solutions to provide agility efficiently and effectively.** To ensure that existing tools – Salesforce, Veeva, Adobe, etc. – are being used to their fullest potential, pinpoint the tech gaps that are preventing efficient and effective omnichannel execution, and explore what innovations can drive business goals, meet customer needs, and provide competitive differentiation.
- For pharma brands specifically, leveraging **search engine optimization (SEO)** and digitization is no longer a “nice to have”—it is absolutely mandatory. The company's website needs to load as quickly as possible and implement schema tags within the html to provide as much content to search engines as possible. More importantly, if the company doesn't have the right content on your site, all of these SEOs would be pointless. There is essential need to perform research to see the questions people are asking about your brand, industry, service, condition, etc.
- Often marketers have blinders on regarding how people actually search. When people search, they are not speaking in marketing language—they have more general questions related to your product or industry. Unlike desktop and mobile searches, which consist of short keyword phrases, when people perform voice searches, they often ask full, grammatically correct questions (not keywords). In such cases **sentimental analysis** using Artificial intelligence and machine learning programme will help the company to understand patient need which indirectly help the brand to grow and increase its recalling value in mind of customer.

Conclusion:

The outbreak of the coronavirus/COVID-19 is causing structural and operational changes to the way healthcare and pharma marketing functions in India. Changes will likely have a long-lasting impact on how pharma brands approach their marketing strategies. Pharma companies must look to new technologies and change their marketing strategies in order to adapt to this new landscape.

We can thus conclude that during this pandemic, where every pharma company is vying for direct communication, digital marketing, social media advertising and networking with doctors through websites, Facebook, Instagram and other social media platforms, is necessity of time. The pharma companies should look upon going digital as a thrust and grab the opportunity.



This new era of e-connect will not only save time and money but also create new opportunities for the pharma companies. Brands will find their opportunities to be greater than the challenges facing them when they properly plan.



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