

Current Status of Digital Marketing in Indian Pharmaceutical Industry

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Abstract :

Digital health will transform the business models of the pharmaceutical industry. Although many companies have not yet formulated a concise digital health strategy, industry executives expect that in the coming times digital health will enable pharmaceutical companies to activate new business segments as well as to significantly improve their competitive advantage. Successful implementation of digital health strategies will result in transformation across four main areas: organizational prioritization, customer focus, enlargement of capabilities and uncertainty of revenue streams. The strategic moves that companies make today will determine their survival in this era of profound digital disruptions. Indian pharmaceutical industry can be considered amateur regarding the usage and adaptability of digital platform technology. We have analysed the current status of use of various digital tools by different Indian pharmaceutical companies with reference to the utility of the digital platform. This will help to build a strong and well defined road map for the applicability of the digital technologies in Indian scenario and help the upcoming experts in health care and allied sectors.

IndexTerms - Digital marketing, Indian pharmaceutical industry, digital initiatives.

I. INTRODUCTION

Healthcare in India is growing at a rapid pace, currently valued at US \$ 100 billion, and expected to touch US \$ 280 billion by 2020. Digital intervention in healthcare is expected to drive the industry at a CAGR of 23% by 2020 (The Economic Times Report). Since 2000, digital disruption has demolished 52% of Fortune 500 companies. ¹ These companies have either gone bankrupt, been acquired or ceased to exist. The pace of transformation has increased, competition has intensified and business models have been profoundly disrupted. This shift is happening at breakneck speed across industries, and pharma can no longer be an exception. Customers have already embraced technological changes, through their many digital touch points, and pharma must look toward digital to re-imagine the customer experience. The urgency of acting is acute. It is time that pharma companies in India took a step back and re-envisioned digital as a core strategic enabler. The first step to commencing on the digital journey is to understand the current state of maturity. Between public and private healthcare, India triumphs in terms of affordability, and carries a competitive advantage due to its large pool of trained medical professionals. Pipeline investments and dedicated government initiatives are likely to contribute towards a more robust healthcare system in India.

Pradhan Mantri Jeevan Jyoti Bima Yojana

The government-backed life insurance scheme announced in 2015 aims to increase the proportion of population in India that has any kind of life insurance. The scheme is available for people in the age group of 18-50 years of age, who have their bank accounts opened under the Pradhan Mantri JanDhan Yojana scheme. The premium for the insurance amounts to 330 Indian Rupee (INR) per year, which is tax exempt, and provides a coverage of 2 lakh INR in case of death due to any cause. This scheme has benefitted over 5.22 crore families after its implementation. ²

National Health Policy 2017

This policy aims to project an incremental assurance-based approach that expounds on the need for a new health policy to account for changing priorities in India's abysmal healthcare delivery system. This involves building a more 'robust health care industry', reducing 'catastrophic expenditure' in the form of out-of-pocket healthcare costs and enhancing 'fiscal capacity' to meet a widening healthcare financing deficit. ³

In a nutshell, swelling investments as well as sincere public initiatives are likely to converge in near future, leaving India with one of the most affordable, wholesome, as well as accessible healthcare systems.

1.1 Indian pharmaceutical industries' journey to the digital world: The first step

Indian pharmaceutical companies are still way behind their global counterparts. While most Indian companies could be considered at the "beginners", "Amateurs" and "conservatives" stages, as compared to their global counterparts, which are fiercely moving toward being "digital technology practitioners". Whatever was being done manually earlier is now being done digitally. However, there is still a lack of awareness and adaptability, in Indian pharmaceutical industry.⁴ Although there are many transformations in the working of the industry, but, those changes are not adding any potential values. In Indian pharmaceutical industry, the digital intent is strong, but proper execution is yet lacking.

Majority of the senior pharma leaders have a strong positive inclination towards digital technology, as a "strategic" rather than a tactical approach. However, lack of a clear digital strategy/ value proposition and change management are perceived as the two key barriers in embracing the digital platform. Data would become the new currency of digital marketing and analytics will be the key enabler. Data is the backbone of sustained and effective digital marketing. Companies are gradually realizing that a "lot of untapped data at the moment can be tapped only using digital technologies". With renewed interests, Indian pharma companies are gaining dynamic customer insights and personalizing customer experience.

Pharmaceutical companies are running hard to keep pace with changes brought about by digital technology. Mobile communications, social media, virtual reality, augmented reality, advanced analytics, and internet of things are amongst the innovations that are starting to transform the healthcare industry in the manner it has transformed the media, retail, and banking industries.⁴ Pharma executives are not well adept of the disruptive potential of the digital platform and are experimenting with a wide range of digital initiatives. Content in the digital space can be broadly classified under invested, earned and owned. A few examples of the same have been listed below in Figure 1.

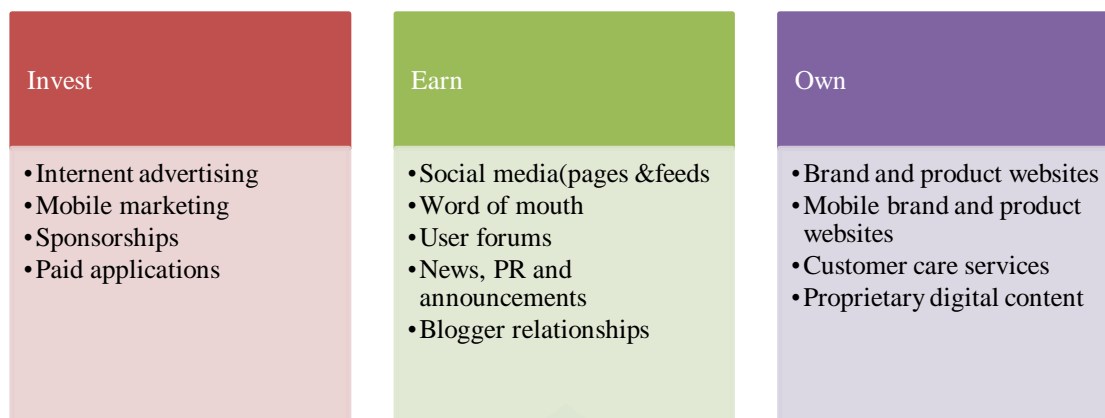


Figure 1. Invest, earned and owned digital space examples

1.2 Outcomes-based care is moving to center stage

In this digitally evolved environment, digitally enabled "beyond the pill" solutions, are gaining popularity at a large scale. It includes not just drugs, but other technological counterparts to enable the drug to function well or enable the treating physician to monitor the patients improvements well. For an instance, the use of nano-sensors to collect and analyze data to monitor a patient's condition in time period between the visits to healthcare providers. These kind of technological developments are becoming a critical requirement, along with serving the needs of both the parties'.⁵ These solutions help increase adherence to the treatments provided resulting in improving health outcomes effectively and help both the payers and the governments to reach the expected goals. This kind of efforts generates, the data that would be beneficial to the pharma companies need to demonstrate their drugs' efficacies.

1.3 Digital technology inception by the patients

In present digital age, patients are much less dependent on their doctors for health related information, treatment options and are increasingly able and willing to take greater control of their own health. They feel empowered by vast amount of health related information available on online resources.⁶ In this digital world, the ability to engage with patients as they make such evaluations could be the key to success of a pharma company's commercial model. For example, SPEAK Health by Sun Pharma is about having simple conversations in care. SPEAK Health empowers the patients with the knowledge that would enable them to take better responsibility of their treatment. There are also various pill reminder apps such as Medisafe, Pillpack etc, which have been accepted and are being used by Indian patients. Apart from pharmaceutical companies, some globally renowned treatment centres such as Mayo Clinic, Cleveland Clinic, MD Anderson etc, have put a lot of information on the disease area, modes of treatments available, side effects of drugs, and other such information which could be very useful both for the patients and caregivers.

1.4 Product performance: Additional information from online resources

Historically, pharma companies have controlled both the generation and dissemination of information about their products. Digital technologies have weakened that control, opening an array of new, independent information channels. There are online communities for sharing and discussing patients' experiences, apps and sensors to monitor the impact of therapy on a patient's daily life, and advanced data aggregation and analysis to link disparate, complex data sets and generate new insights into drug safety and efficacy.^{7,8} *The Natural Doctor*, *The Doctor Weigh In*, *Get Better Health* are few of such successful blog pages.

Pharma companies will have to build the capabilities to anticipate or react rapidly to these new sources of evidence, and remain the main source of authority on the performance of their products. With its limitations (as per the guidelines) few of the Indian Pharmaceutical companies have also started Facebook, Twitter pages where the patients can directly interact with the clinicians and other health experts.

An example of such informative blogs is shown in Figure 2. It is the blog of MD Anderson cancer centre, which is a leading cancer treating centre in the world. The blog provides information regarding the treatment and provides related informational support to the patients.

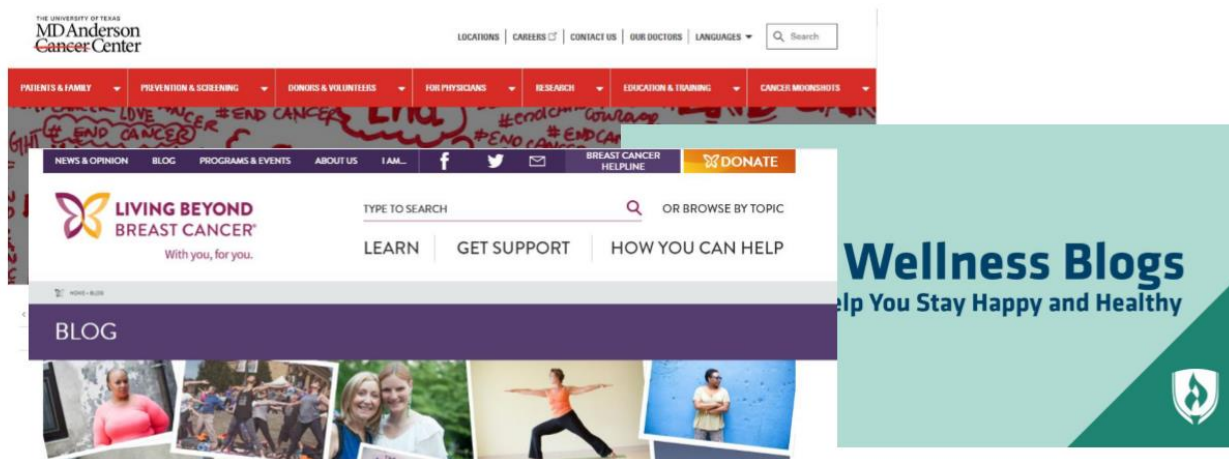


Figure 2. MD Anderson blog for the cancer patients

1.5 Digital technology: Improving Process efficiency and agility

Advanced analytics, sensors, and automation of complex decisions are capable of delivering a major change in the efficiency, speed, quality, and responsiveness of business processes of all industries. The pharmaceutical industry is no exception. To thrive in a digital world, pharma companies would require to deploy next-generation technologies to streamline their business processes.⁹ They need to achieve near real-time transparency of their clinical-trials portfolio in Research & Development. For example, Novartis on its website displays its complete pipeline of products (All the phase 3 and phase 4 trials as well). This is a big change as compared to earlier times when Industry would shield their on-going- as well as newer developments.

Indian pharmaceutical industry stands on cross roads of their journey into the digital world.^{10,11} There are many good examples where industry has taken initiatives for clinicians, patients and marketing forces by using the digital platform. Many things have been started but there is not a clear road map to the adoption of digital technology. The main objective of this study was to evaluate what are the options/ tools being used by industry today. Also to gain an futuristic approach towards the tools, which are yet to be implemented. The main aim was to evaluate the current position of digitalization of pharmaceutical industry about the options it has and what could be the way forward in the journey towards digitalization.

II. MATERIALS AND METHODS:

We included brand managers of super speciality divisions of Intas Pharmaceuticals Ltd. in this research study. We interviewed them for the views regarding the digital marketing initiatives conducted at their company in recent past. In this research study, we have also compared the digital marketing initiatives of the participants company, with various other companies of Indian Pharmaceutical industry. We did a secondary market research for finding out the digital marketing initiatives of various pharma companies in India. All the initiatives were categorized in 3 sections: a) For doctors b) For Patients c) For sales force.

III. RESULTS:

We interviewed 10 brand managers of the super speciality divisions of Intas Pharmaceutical Ltd. about the various digital marketing initiatives conducted in the recent past. The findings of the interview are as below:

a) For doctors:

1. *World Cancer Day*: A cancer awareness initiative was taken up on world cancer day i.e. 4th February where in doctors were urged to update their Facebook and Whatsapp profile pic with the cancer awareness message. It was widely appreciated and more than 1200 oncologists were engaged.
2. *International Speaker Program Webcast*: To increase the reach of International Speaker Program to a larger audience of super speciality doctors, live webcast was used and in a span of 2 years *Intas managers* have conducted 7 international speaker program webcasts and reached out to an audience of more than 2700 clinicians in the country.
3. *Digital plantation*: This initiative was conducted for one of the company's lung cancer brand wherein doctors can select the plant and same plant is planted in a particular area by one of the linked NGO. Doctors can view where the particular plant is planted as it is mapped with the doctor's name on the NGO's website. This was a very much appreciated initiative resulting in around 500 doctors engagement.
4. *Digital advisory board*: Usually pharma companies conduct physical advisory board meeting but the participants company, have started a new chapter in medico-marketing by initiating digital advisory board meetings. With the help of this initiative time, travel and money can be saved and it also helps to connect with the clinician at his present location and time.
5. *Google forms*: With the help of Google forms many surveys are being conducted to understand new molecules, to take feedback about marketing initiatives and to engage doctors in novel marketing campaigns.
6. *E-detailing*: At *Intas*, they have connected i-Pads where all detailing information on any product is available online, any change is pushed centrally and is available almost in real time. This platform also enables closed-loop service for their doctors in case they have any scientific or medical queries. They are running analytics on this to see what type of content is more relevant and gets more time and attention from doctors. Equipped with these analytics-based insights, they are now able to tweak the content to make it more relevant for them.
7. *Videos and GIFs*: Theme based videos and GIFs are regularly created to promote important brands in an indirect manner.

b) For patients:

1. *Pahal*: Patient information initiative for kidney transplant patients where, they get useful information on regular basis through SMS.
2. For *Schedule H drugs*, direct advertisement to patients and caregivers is not allowed. Services of NGOs are used to ensure patient's confidentiality. However, critical patients such as those who have undergone organ transplantation need regular reminders on correct dosing. Non-compliance on the drugs could result in saviour condition such as organ failure eventually leading to patient's death. NGOs help these patients to ensure drug compliance and also enthuse positivity using digital route.

c) For sales force:

1. *WebEx*: In Super Speciality, one need to be very much updated with respect to therapy and new molecules. Hence, it is imperative to go beyond class room training and imbibe digital tools to conduct training online. *Cisco WebEx* is being used to conduct online training of the sales force at *Intas* on regular intervals.
2. *WBL*: *WBL* is full form of Web Based Learning, wherein an online module is created on a monthly basis. The sales force at *Intas*, needs to learn it on a routine basis, which is then followed up by an online quiz.
3. *Tiny cards*: It's a fun way to learn key points about the brand and therapy. *Intas* has started this initiative few months ago and it has changed the way people learn.

PATIENTS

- Social Media: Facebook pages, Twitter handles, Blogs (interactive)
- Websites of various drug companies, hospitals
- NGOs running various blogs for the patients
- Use of facebook and whatsapp for awareness
- Patient information initiatives

DOCTORS

- Live Webcast: were the subject expert is connected to multiple centers
- Facebook live
- Website of Clinicians
- Digital Advisory board
- Virtual reality for brand launch
- E- Detailing

SALES PROFESSIONALS

- Trainig through Web-Ex
- Quiz and regular web based learning programmes
- Gamification for easy learning

Figure 3. Digital Marketing Initiatives used by Indian Pharmaceutical Industry

The secondary market research was carried out by the researchers to know about various digital marketing initiatives conducted in the Indian Pharmaceutical Space. Here is a list of them categorized in three sections in the same way as aforementioned.

a) For doctors and in general:

1. *Vivitra care*: A Facebook page for breast cancer awareness created by Zydus. Around 12000 people have liked their page. They post many doctor videos and info graphics on breast cancer awareness on this page.
2. *Share it Colorectal Cancer*: A Facebook page for colorectal awareness created by Zydus. Around 15000 people have liked their page. They post many doctor videos and info graphics on colorectal cancer awareness on this page.
3. *Digital marketing profiles*: Indian pharma companies have started recruiting a dedicated team of digital marketers. For example, Dr Reddy's has a position of Senior Manager – Digital marketing since 3 years. Novartis India, has a digital marketing division.
4. *Twitter handle*: Many Indian Pharma companies are become active on social media and have their official Twitter handle. Eg: Sun Pharma, Cipla, Zydus, Mankind, Dr Reddy's, Lupin, Biocon, Emcure, etc.
5. *Virtual Reality for brand launch*: Novartis has used virtual reality to launch various brands during conferences. Product information and mechanism of action was being explained through virtual reality.
6. *Knowledge Genie*: A knowledge portal brining the latest insights and key developments in medical education to Physicians and the medical community – an initiative by Abbott.
7. *E-detailing*: All the oncology companies in India have provided i-Pad to their sales force. Multinational companies are at forefront in using i-Pad as latest information about their products and clinical trials is being shared.

b) For patients:

1. *Speak health*: A Facebook page by Sun Pharma to create awareness and facilitate conversations about health. It has eight lac plus members.
2. *Speak health Men*: *SPEAK Health Men* is India's only Facebook page dedicated towards addressing the health concerns of Men. It has five lac plus members.
3. *Breathe Free*: An Asthma awareness initiative by Cipla. They hired Actress Priyanka Chopra as a brand ambassador for their 'Be Rok Zindagi'.

4. *Be Brave Be Bold*: A campaign by Abbott aims to remove the stigma associated with having diabetes. It provides the knowledge that can help the individuals having diabetes, overcome challenges which they might face and unlock all that life has to offer. The film created for social media uses real profile pictures of more than hundred people with diabetes leading happy and healthy lives.
5. *Prostate in Focus*: An app developed by Glenmark is a 24x7 way to access all the information on prostate cancer. More than five hundred people have installed the app.
6. *Chai for Cancer*: *Chai for Cancer* seeks to create awareness of and raise funds for chronic myeloid leukaemia (CML) & gastrointestinal stromal tumor (GIST) cancer survivors, led by Viji Venkatesh supported by Max Foundation.
7. *Shut the phone up campaign of Mankind* (Manforce condoms) is a fine example of how well one can use digital platform in Pharma Industry.
8. *Use of Celebrity*: Many Pharma companies have also made good use of celebrities for their campaigns. E.g. Amitabh Bachchan for Mankind, Parineeti Chopra for Zydus (Sugarfree) etc.
9. *Sanofi's* use of youtube channel which is very informative

c) For sales force:

1. *Gamification of learning modules*: Leading oncology companies have come up
2. *Microsite* by Pfizer which is dedicated to employees to blog about the work they are currently doing.

The way forward

- Minimize invasive sales “push” tactics
- Build clear value proposition by meticulously mapping the entire physician journey
- Deliver personal, dynamic, real time content and enable two-way communication for time-strapped physicians
- Up skill representatives to make them more responsive and adept at evolving with changing physician needs
- Redefine your customer base, including patients as an integral part of your customer engagement strategy
- Play an active role in creating an integrated healthcare ecosystem, providing end-to-end disease management

There are a few key points, based on our analysis as what can be the futuristic approach for the Indian pharmaceutical industry to build a robust digital marketing plan.



Figure 4. Way forward for Indian pharmaceutical industry

IV. CONCLUSION:

Present scenario for Indian pharma companies is important to create their own digital story and not fade away as another footnote in the history of disruption. The upcoming future period of 3 - 4 years, would be crucial for the Indian pharmaceutical industry, to get out of the comfort zone and embrace new transformations to avoid being disrupted. The strategic moves that companies make today will determine their survival in this era of profound digitalisations. For Indian pharmaceutical industry to be relevant, they must have an approach towards digital channels as a way to discover, interact and attract customers. Blending online and offline channels can improve ROI drastically and create a more lasting impact in minds of the customers.

Thus, building such customer-centric digital commercial models requires profound changes across the external and internal aspects of business. Companies will need to fundamentally redesign their digital agenda and operating models, rethink how they attract and nurture digital talent, and consider afresh how they measure the success of their business. Sustaining such commercial models focused on solutions and services, rather than just selling the pill, will require pharma companies to adapt and evolve their strategies often. Agility will become core strength among winning pharma firms.

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