

# What is the real value of digital pharma marketing?

**Position paper**

November 2015

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# 1. Introduction

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**This position paper focuses on the evolution of pharma marketing in the context of the expansion of digital channels**

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## Context & objective

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- The **digital** (Internet, mobile, cloud, etc.) has **revolutionized** the way we live and **interact** with each other
- Most industries (IT, banking, media, etc.) have **adapted** their business model, their organization, their management and even their culture in the past 10 years to fit the changing environment
- If **pharmaceutical companies** have been quite **slow** to adopt digitization, the healthcare industry will not escape from diving into digital and the whole pharma value chain should be transformed in the short- to mid-terms: R&D, Market Access, Distribution, Sales, Marketing and Communication
- But as of today, in terms of digital transformation for pharma companies, there was no disruption. Companies often only digitalize existing practices, especially regarding the way they promote their drugs and services
- This position paper will focus on the **evolution of pharma promotion** linked with digital matters and will try to answer to the following questions:
  - What is digital marketing?
  - How has the pharma promotional environment changed?
  - What are the main digital channels used by pharmaceutical companies and their stakeholders?
  - What should be the digital channels to favor for pharma companies?

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Sources: Smart Pharma Consulting analyses

# 1. Introduction

Digital marketing refers to the use of digital channels and tools to promote products but does not necessarily entail the combination of them in a multichannel approach

## Digital marketing and multichannel approach

- **Digital marketing** refers to the use of **digital channels and tools to communicate, inform, and promote products and services to customers**
- Two types of digital marketing exist:
  - **Push marketing** brings content to the user, e.g., e-mails, digital banners, SMS, etc.
  - **Pull marketing** for which consumers actively seek out content, e.g. via web searches, blogs, etc.
- In the **pharmaceutical field**, digital marketing can use several channels and tools, including for example:
  - Websites
  - E-detailing with digital tablets

- The **multichannel approach** is a **systematic, coordinated and consistent** use of several **communication channels, either digital or not, to promote** products and services to **different customers** (physicians, other healthcare professionals, pharmacists, patients, etc.)
- The objective of the multi-channel approach is to find the most **synergistic combination of channels**, while delivering a **consistent message** to targeted clients



## 2. Changes in the pharma promotional environment

Physicians' saturation regarding face-to-face calls, reduction of sales forces and apparition of new medias bring about a redefinition of promotional strategies

### Changes in the pharma promotional environment (1/2)

- Strengthening of CRM<sup>1</sup> tools allowing for a more precise profiling of customers

- Strong detailing pressure of companies on the same targets of high potential physicians
- Evolution of product portfolios (increasing weight of specialist-oriented products requiring less sales reps)
- Increasing role of other market players (patient advocacy groups, regional sickness funds, etc.) influencing physician prescriptions



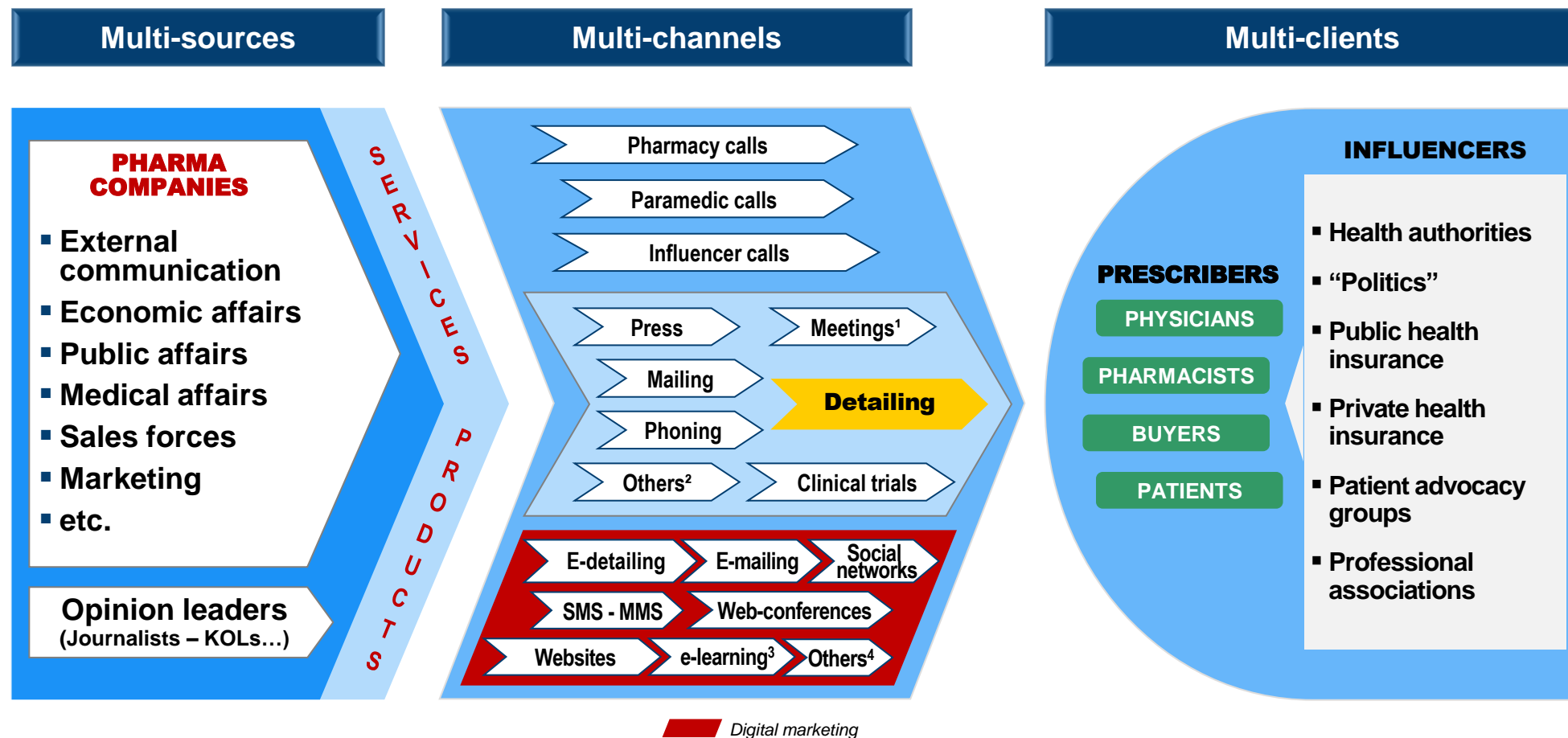
- Higher proportion of physicians refusing face-to-face calls from sales reps
- Tighter control of medical calls by health authorities which aims at:
  - Reinforcing detailing of products' good usage as set in SmPCs<sup>2</sup>
  - Limiting the number of calls to contain the number of physicians' prescriptions
- Need to adapt communication (contents and channels) to multiple targets (prescribers, influencers, payers)
- Reduced marketing and sales force budgets

- Reduction in the number of new active substances with high sales potential, lead companies to try to:
  - Improve the level of return on investment of each promotional activity
  - Maximize the profits of mature products by using more efficient promotional channels
- Less favorable economical context

## 2. Changes in the pharma promotional environment

As prescription decisions increasingly depend upon multiple clients, pharma companies need to adopt a more complex and coordinated promotional approach

### Changes in the pharma promotional environment (2/2)



Sources: Smart Pharma Consulting analyses

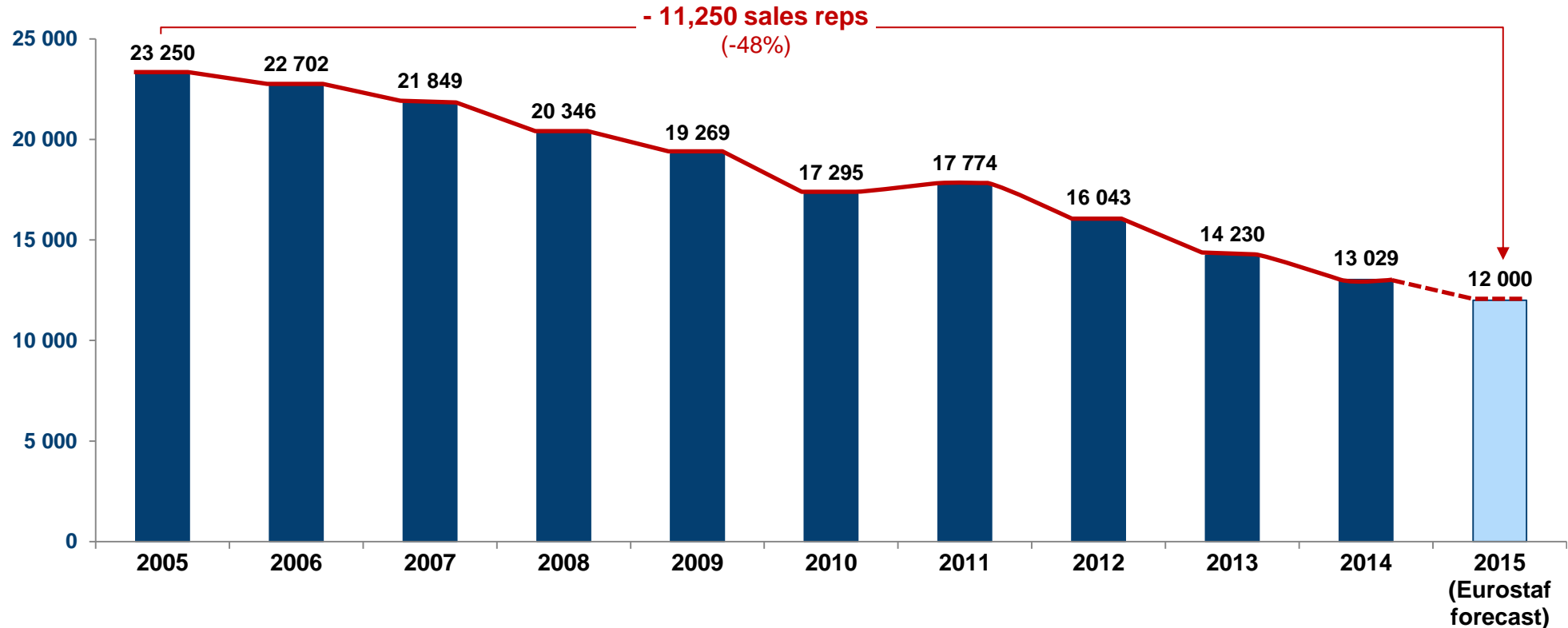
<sup>1</sup> Round tables, symposia, congresses... – <sup>2</sup> Sampling, gimmicks, grants, prescription pads... – <sup>3</sup> Continuous medical education through a digital interface – <sup>4</sup> Screen savers, popup windows...

## 2. Changes in the pharma promotional environment

In France, the number of sales reps in 2015 is estimated at ~12,000, which means a reduction of ~50% over the last ten years

### Evolution of sales forces in France (2005 – 2015)

Number of sales reps



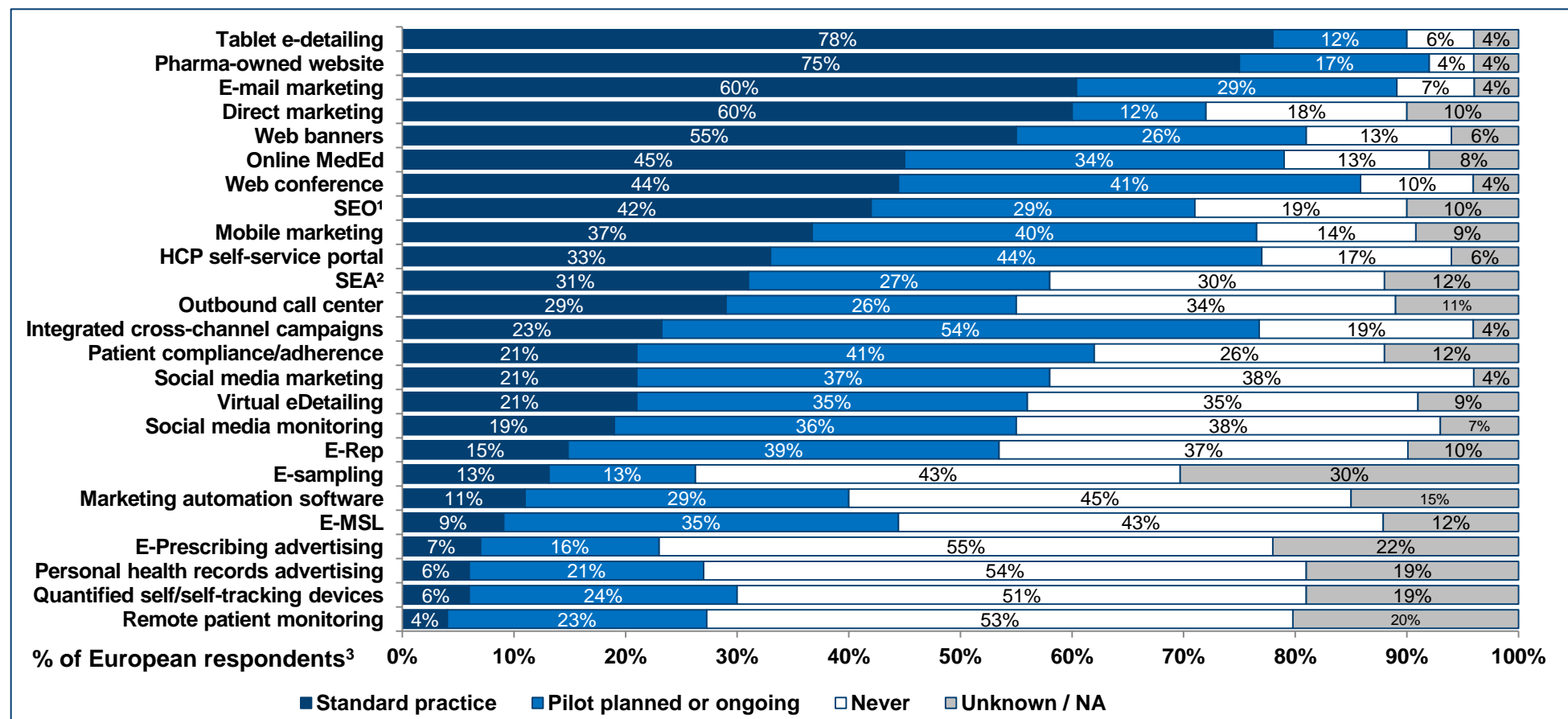
Sources: LEEM (2010 → 2014) – Eurostaf August 2010, “Les mutations de la visite médicale” (2005 → 2009)– Smart Pharma Consulting

### 3. Selected digital channels used in pharmaceutical promotion

Introduction

Certain digital channels, such as tablet e-detailing, pharm-owned website or e-mailing are routinely used by most of life science companies

#### Digital channels used by life science companies in Europe (2015)



Sources: Across Health Multichannel Maturometer 2015 – Smart Pharma Consulting analyses

<sup>1</sup> Search Engine Optimization – <sup>2</sup> Search Engine Advertising – <sup>3</sup> 260 respondents from 100 life science companies, 89% from pharma companies, 6% from medical devices companies, 3% from OTC companies and 2% from other companies; 65% from Europe



Face-to-face e-detailing relies on electronic supports (digital tablets), while remote e-detailing, sales reps interact with a physician through video and voice

#### E-detailing or (electronic detailing)

##### Face-to-face e-detailing

- Reps call upon physicians in a **traditional way** while using a **digitalized visual aid on a tablet**
- Contents are often pre-loaded for regulatory reasons (or are consulted over the Internet), allowing interaction and flexibility
- The use of a digital support enables the integration of **simulators, calculators, video extracts** or animations, access to database, etc., and CLM (closed loop marketing) by capturing information re. physician behaviors, preferences and attitudes that will be considered by marketers & reps
- Physicians** are becoming **more and more reluctant** to face-to-face e-detailing they find time consuming, not very convenient and not always relevant



Face-to-face contact



Digital tablet



##### Remote e-detailing

- Remote interactions** between a rep (or another person from the company or an agency) and a physician through Internet (visual interaction) and a phone (conversation)



Virtual visit



- Reps and physicians set an appointment
- They communicate by **phone** or by **VOIP** (voice over Internet protocol) such as Skype and can use a webcam
- The rep leads the physician on specific **web screens** where environment- and/or product-specific information are available
- The use of virtual e-detailing also allows the broadcast of **video extracts** or **animations**
- The number of physicians who accept remote e-detailings represents less than 10% of those accepting face-to-face calls
- The number of virtual live e-detailings is in general  $\leq 2$  p.a.



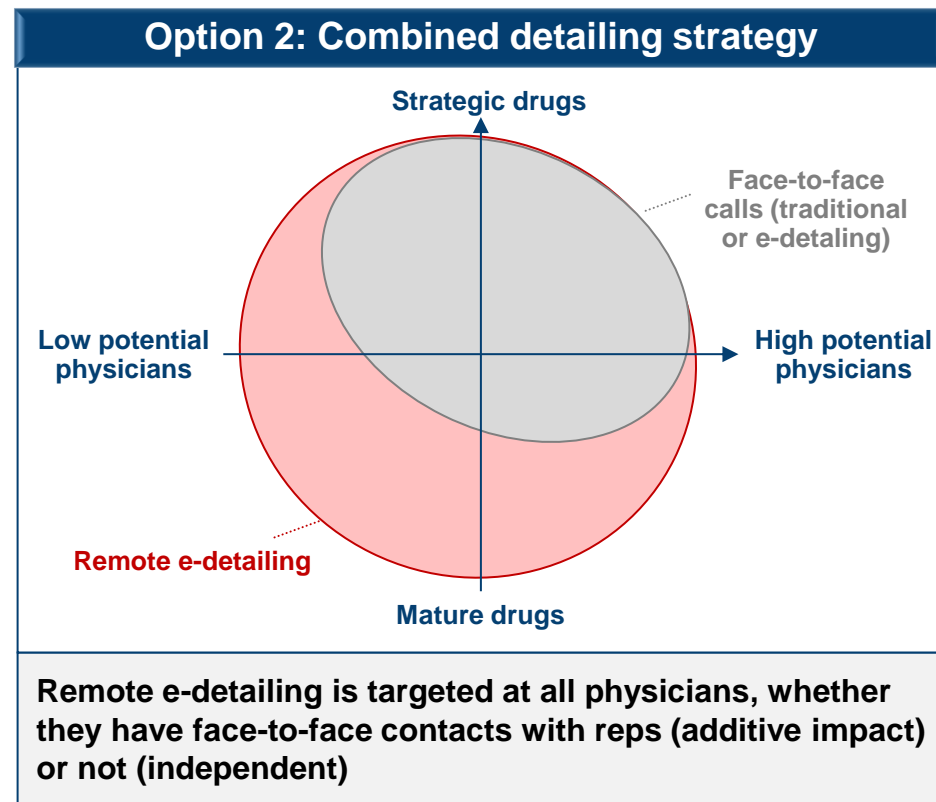
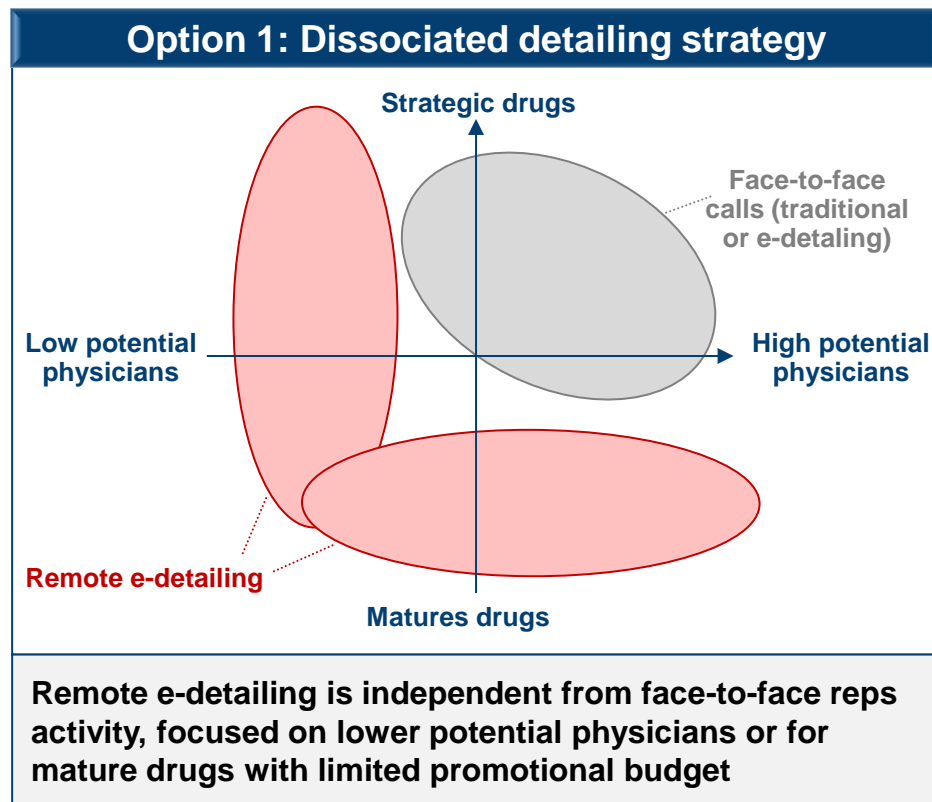
*E-detailing is subject to the same rules as traditional detailing*

### 3. Selected digital channels used in pharmaceutical promotion

E-detailing

Remote e-detailing can be targeted at lower potential physicians or used as a complement to existing face-to-face calls for higher potential physicians

#### Dissociated and combined detailing strategy



*Physicians can be segmented on the basis of pharma companies' ability to detail them, e-detailing being used as an additional or an alternative channel to face-to-face calls*

## The dissemination of product-related information can be achieved without interpersonal interactions through websites or webpage links on portals

### Websites and Internet portals

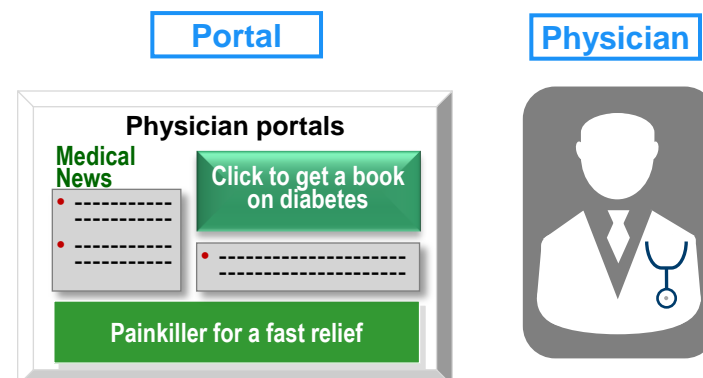
#### Websites

- Websites where corporate and product information are displayed
- Within a website it is possible to create different sections targeted to specific audiences (e.g. physicians, pharmacists, patients, etc.)
- With the Web 2.0 technology, websites content is governed by users with no control by companies (e.g. blogs, wikis, social networks, etc.)



#### Internet portals for healthcare professionals

- Physician portals generate traffic and thus can be used by pharma companies to deliver product-specific messages to a targeted audience
- Physicians visiting these portals are “invited” through banners, catch phrases, book offers... to enter product sponsored pages



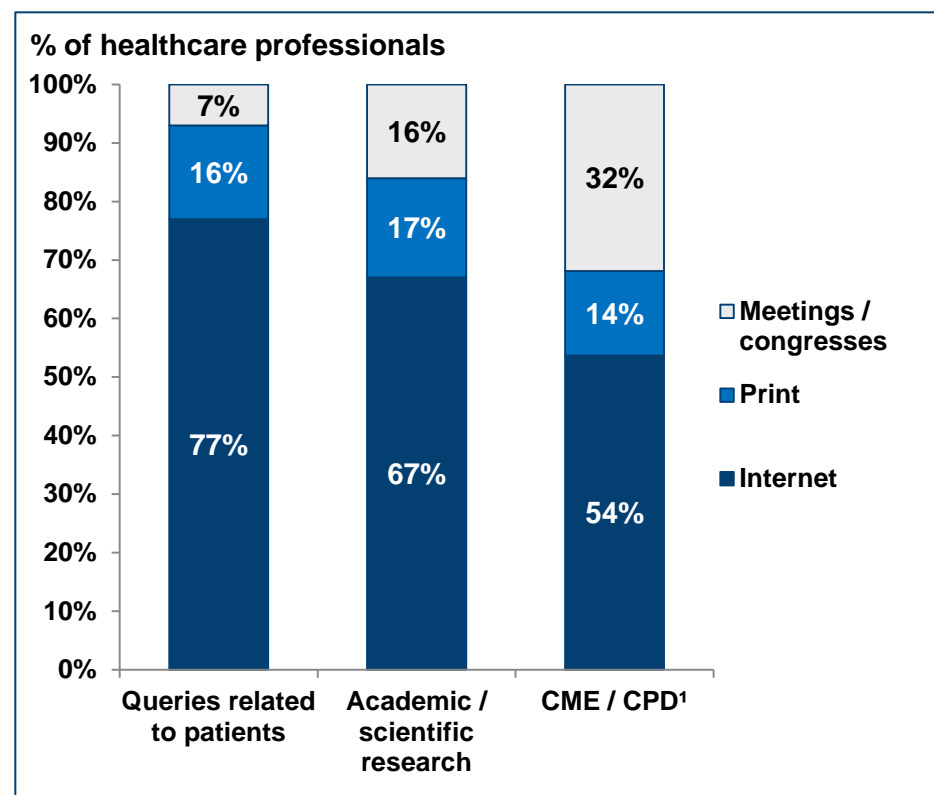
### 3. Selected digital channels used in pharmaceutical promotion

Websites and portals

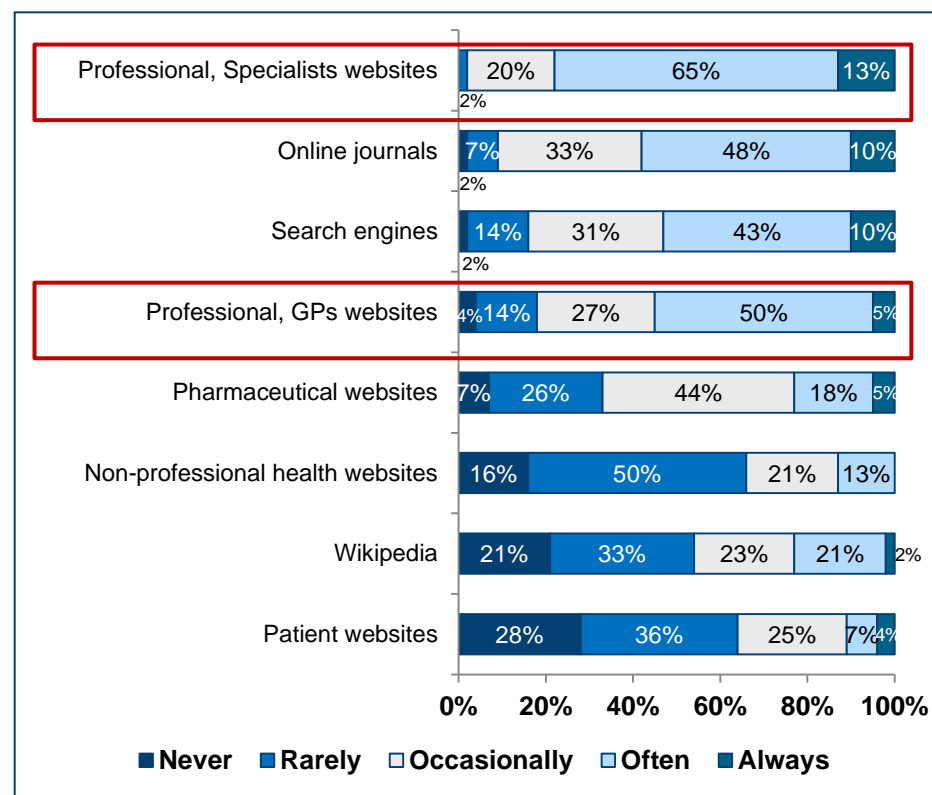
Healthcare professionals prefer to use Internet – mainly professional websites – rather than attend congresses or use printed materials to get access to information

#### Use of Internet for work purposes

Preferred channels used by healthcare professionals to access professional information



Sources used by healthcare professionals



Sources: EPG Health Media: The Online Behavior and Demands of HCPs in Europe (November 2011)  
– Smart Pharma Consulting analyses

<sup>1</sup> Continuing Medical Education / Continuing Professional Development

### 3. Selected digital channels used in pharmaceutical promotion

Social medias

Social medias are collaborative platforms available on Internet for which the content is generated and broadcasted by users

#### Social network types

##### Social networks

- Generalist networks

facebook



- Professional networks

LinkedIn

viadeo

- Healthcare professional networks

sermo

Healtheva  
the network for doctors and researchers

- Patient communities

patientslikeme

carenity  
L'avis des patients

##### Participative medias

- Discussion forums, blogs, microblogs, etc.

twitter



reddit

tumblr

##### Collaborative medias

- Wikis, sharing of recommendations and opinions



Epinions.com



##### Digital sharing platforms

- Websites hosting and facilitating the sharing of videos, photos and other digital contents

YouTube

dailymotion



Instagram

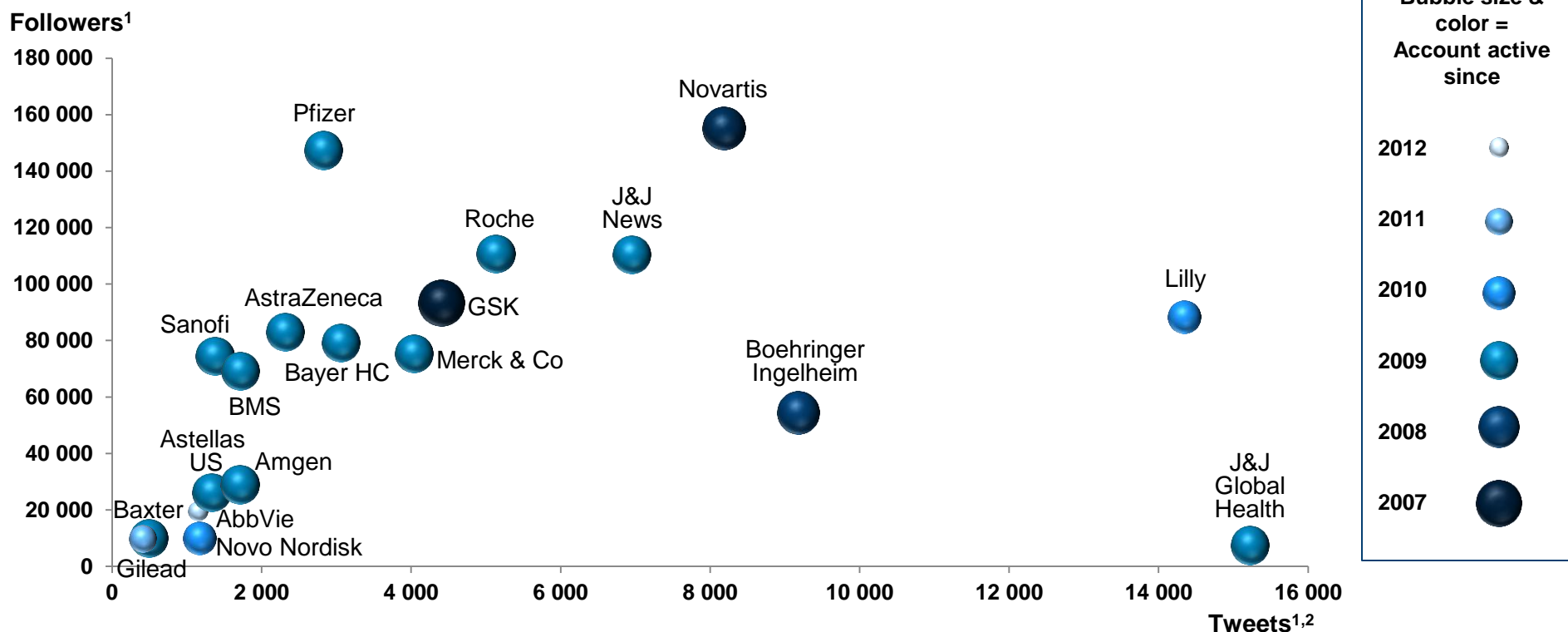
flickr

Most big pharmaceutical companies created their Twitter account in 2009 but only few of them, such as Lilly, J&J and Boehringer Ingelheim, seem to be really active



#### Presence of pharma companies in social networks – Twitter (1/2)

Selected pharmaceutical companies' Twitter accounts



Note: Some pharmaceutical companies have various Twitter accounts for geographical reasons (e.g. TevaUSA & Teva\_es) or to communicate on distinct subjects (e.g. J&J News, J&J GlobalHealth, J&J Care)

Messages posted on Twitter mainly relate to interactions with patients, institutional communication and scientific news



#### Presence of pharma companies in social networks – Twitter (2/2)

##### Examples of tweets<sup>1</sup>



- “Learn how men in Malawi are stepping up to reduce HIV/AIDS in babies”
- [“#WD2016](#) will be the largest meeting on women & girls' health & rights in a decade. Don't miss it”
- “10 things you didn't know about congenital heart defects”
- “What if we could prevent non-infectious diseases before they occur? “



- “We strive to improve health and strengthen communities worldwide through our corporate responsibility efforts.”
- “We're honored to be recognized at [#ICN2015](#) for our commitment and involvement in the battle against [#MDRTB](#)”
- “36 million Americans - about 12% of the population - suffer from migraines at least periodically.”
- “Check out our recap on patient engagement.”



- “PRESS: First patient study data for [#idarucizumab](#) – interim analysis from REVERSE-AD announced today [#NEJM](#) [#ISTH2015](#)”
- “Are you aware of the 4 biggest risk factors for [#type2diabetes](#)? Click here to find out what they are”
- “It's World No Tobacco Day. Smoking can put you at greater risk of an asthma attack. Think about your lung health.”
- “Today was our [#AnnualPressConference](#) at HQ in Germany. Stay tuned for key messages!”



- “PsA patients often suffer from depression & social isolation. Watch one patient share his personal experience here”
- “More than 114,000 cases of [#multiplemyeloma](#) are diagnosed each year—here's what you need to know”
- “40% of [#Novartis](#) Group managers are women. Learn more in our CR Performance Report.”
- [“#Novartis](#) announces new Phase III long-term findings in [#polycythemiavera](#), an incurable [#bloodcancer](#)”



#### Case study: Digital sharing platforms

#### Johnson & Johnson YouTube Channel

#### Context

- J&J<sup>1</sup> wanted to exploit YouTube's potential:
  - YouTube has over 1 billion unique visitors per month and reaches the coveted 18-34 year old demographic more than any cable network
  - 300 hours of video are uploaded to YouTube every minute
  - YouTube is localized in 75 countries and available in 61 languages

#### Objectives

- Enhance the company image in terms of social responsibility and commitment to society: *"Connect with our company and learn about our news, initiatives and programs, including those in health and wellness, innovation, philanthropy, and sustainability"*
- Improve the reputation of J&J as a reliable source of health information
- Build a transparent relationship, made of open discussions with the public
- Increase traffic to other websites

#### Implementation

- Creation of the YouTube Johnson & Johnson health channel (first video posted on May 13<sup>th</sup>, 2008)
- Link to J&J Social Media Community Guidelines and YouTube Community Guidelines



#### Results<sup>2</sup>

- 585 videos available on the Johnson & Johnson health channel
- 6,945,000 views
- 12,485 followers
- Very positive comments posted by users on the channel's page
- No cases of critical comments yet to be mentioned
- Effective promotion of some videos (e.g. campaign for Nursing's Future - Hospice Nurses) with paid advertising

#### Key learning

- YouTube can provide opportunities for the pharmaceutical industry
- Only a transparent communication strategy, which could appear to be more risky, can ensure a positive long-term relationship with the public
- The promotion of a social network is very important to increase access and visibility
- The risks associated with an open conversation with the public are lower than what most industry's collaborators think



### 3. Selected digital channels used in pharmaceutical promotion *Smartphone<sup>1</sup> applications*

The development of applications for smartphones allows pharma companies to improve their reputation and to reinforce their relations with patients and physicians

#### Smartphone<sup>1</sup> applications

Health applications for smartphones developed by pharma companies usually are aimed at two segments

##### Individuals

- Applications for individuals help patients in preventing, treating and monitoring diseases
- For example, these applications can help the patient to:
  - Register his medical information
  - Share his patient records with the therapists
  - Learn about drugs
  - Assess his overall state of health
  - Track his vital signs
  - Etc.

##### Healthcare professionals

- Applications for healthcare professionals offer tools and services useful to the practice of their profession such as:
  - Ongoing training
  - Remotely monitoring of patients
  - Management of health records



#### Case study: Connected tool + Smartphone application

Sanofi blood glucose meter

#### Context

- Because of the ease of access to technology, the market for blood glucose meters is very competitive. It is also attractive because of the importance of the diabetic population
- In a highly competitive market, it is essential to obtain a competitive advantage by differentiating as much as possible
- Sanofi planned to exploit new technologies and the growing availability of smartphones to differentiate its offering, with a connected tool and a smartphone application dedicated to diabetic patients
- The term “connected device” covers every device connected to Internet. It will represent about 24 billion devices in 2020. For instance, it includes mobile phones, laptops, tablets, e-readers, etc.

#### Objectives

- Stand out from competitors by offering a technologically advanced product, which promises to be more accurate, reliable, lightweight and compact than competitors because it uses the iPhone / iPod for functions that would otherwise have to be included in an independent reader
- Win the loyalty of patients and physicians
- Create the image of an innovative pharma company for diabetes in the eyes of patients and physicians

#### Implementation

- Development of a blood glucose meter compatible with the iPhone and the iPod
- Development of an application for iPhone / iPod that allows users to read, save and manage data for each measurement



#### Results

- In 2015, the iBGStar is still marketed and the application iBGStar Diabetes Manager has followed the updated of Apple devices

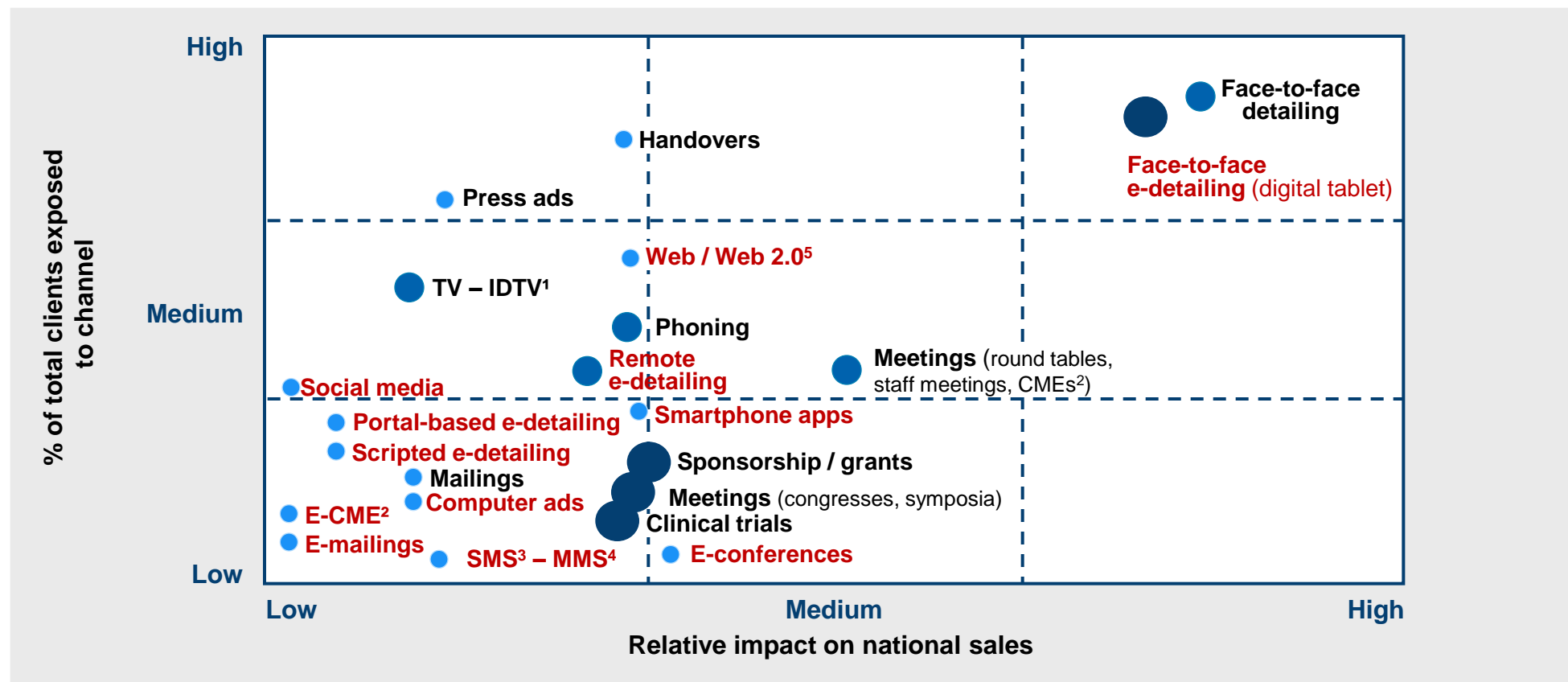
#### Key learning

- Sanofi has managed to launch a health device compatible with a trendy phone, to create the first connected glucometer

## 4. Conclusions

If the impact of an action may be high on an individual basis, the global result may be limited as the number of clients exposed to the promotional initiative may be too low

Promotional channel evaluation matrix



Digital channels

Relative cost per effective contact: High

Medium

Low
























Sources: Smart Pharma Consulting analyses

<sup>1</sup> Interactive digital television – <sup>2</sup> Continuous medical education – <sup>3</sup> Short message service – <sup>4</sup> Multimedia message service – <sup>5</sup> Including websites and blogs

## 4. Conclusions

Face-to-face detailing usually results in the highest impact on prescriptions, and can benefit from other complementary communication channels

### Relative evaluation of selected channels (1/3)

Channels	Preferred Clients <sup>1</sup>	# of clients reached	Primary goal	Feasibility <sup>4</sup>	Cost per contact <sup>5</sup>	National sales impact	Preferred applications
<b>Face-to-face detailing</b>	▪ HCPs <sup>2</sup>		▪ Awareness ▪ Conviction ▪ Reminder	+++			▪ Brand launch ▪ Complex message
<b>Face-to-face e-detailing</b>	▪ HCPs <sup>2</sup>		▪ Awareness ▪ Conviction ▪ Reminder	++			▪ High conviction needed
<b>Remote e-detailing</b>	▪ HCPs <sup>2</sup>	 / 	▪ Awareness ▪ Conviction ▪ Reminder	++			▪ In between or instead of F2F <sup>6</sup> detailing for new brands or established ones
<b>Scripted e-detailing</b>	▪ HCPs <sup>2</sup>		▪ Awareness ▪ Conviction ▪ Reminder	+++			▪ In between or instead of F2F <sup>6</sup> detailing for new brands or established ones
<b>Portal-based e-detailing</b>	▪ HCPs <sup>2</sup>		▪ Awareness ▪ Conviction ▪ Reminder	++			▪ For new or established brands, especially when awareness and conviction are to be strengthened
<b>Mailings</b>	▪ HCPs <sup>2</sup> ▪ Patients <sup>3</sup>		▪ Awareness ▪ Reminder	+++			▪ Medical and brand updates
<b>E-mailings</b>	▪ HCPs <sup>2</sup> ▪ Patients <sup>3</sup>	 / 	▪ Awareness ▪ Reminder ▪ Redirection to web	++			▪ Medical and brand updates ▪ Invitations to conferences, to visit a website...

Digital channels

Evaluation:  High  Medium  Low

+++ Easy ++ Intermediate + Difficult






















Sources: Smart Pharma Consulting analyses

<sup>1</sup> Actual and potential – <sup>2</sup> Health care professionals (physicians, nurses, pharmacists...) – <sup>3</sup> Depending on local regulations – <sup>4</sup> Technical, legal... – <sup>5</sup> Per effective contact – <sup>6</sup> Face-to-face


## 4. Conclusions

Considering the low impact of e-channels on national sales, it may be recommended to use them preferably as an add-on to traditional channels

### Relative evaluation of selected channels (2/3)

Channels	Preferred Clients <sup>4</sup>	# of clients reached	Primary goal	Feasibility <sup>7</sup>	Cost per contact <sup>8</sup>	National sales impact	Preferred applications
<b>Phoning</b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>6</sup></li> </ul>		<ul style="list-style-type: none"> <li>Awareness</li> <li>Reminder</li> <li>Market research</li> </ul>	++			<ul style="list-style-type: none"> <li>Medical and brand updates</li> <li>Invitations to conferences, to visit a website...</li> </ul>
<b>SMS<sup>1</sup> – MMS<sup>2</sup></b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>6</sup></li> </ul>		<ul style="list-style-type: none"> <li>Information</li> <li>Reminder of meetings</li> </ul>	++			<ul style="list-style-type: none"> <li>Reminder message to HCPs<sup>5</sup> if invited to a meeting...</li> <li>Compliance program for patients</li> </ul>
<b>Meetings</b> (congresses - symposia)	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> </ul>		<ul style="list-style-type: none"> <li>Awareness</li> <li>Conviction through experience sharing</li> </ul>	+ / ++			<ul style="list-style-type: none"> <li>Information on medical environment, on brands...</li> <li>Lobbying (KOLs, high potentials)</li> </ul>
<b>Meetings</b> (round tables, staff meetings, CMEs <sup>3</sup> )	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> </ul>		<ul style="list-style-type: none"> <li>Awareness</li> <li>Conviction through experience sharing</li> </ul>	++			<ul style="list-style-type: none"> <li>Information on medical environment, on brands...</li> <li>Lobbying (KOLs, high potentials)</li> </ul>
<b>E-conferences</b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>6</sup></li> </ul>		<ul style="list-style-type: none"> <li>Awareness</li> <li>Conviction through experience sharing</li> </ul>	++			<ul style="list-style-type: none"> <li>Product launch or LCM</li> <li>Product/environment update</li> </ul>
<b>E-CMEs<sup>3</sup></b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> </ul>		<ul style="list-style-type: none"> <li>Awareness</li> <li>Experience sharing</li> </ul>	++			<ul style="list-style-type: none"> <li>Training on medical environment, on brands, on latest research outcomes...</li> </ul>
<b>Clinical trials</b>	<ul style="list-style-type: none"> <li>Physicians</li> </ul>		<ul style="list-style-type: none"> <li>Experience</li> <li>Conviction</li> </ul>	+			<ul style="list-style-type: none"> <li>High potential physicians</li> <li>Expansion of usage for new / established brands</li> </ul>

Digital channels

Evaluation:  High  Medium  Low

+++ Easy ++ Intermediate + Difficult

Sources: Smart Pharma Consulting analyses

<sup>1</sup> Short message service – <sup>2</sup> Multimedia message service – <sup>3</sup> Continuous medical education – <sup>4</sup> Actual and potential – <sup>5</sup> Health care professionals – <sup>6</sup> Depending on local regulations – <sup>7</sup> Technical, legal... – <sup>8</sup> Per effective contact

## 4. Conclusions

Pure advertisements, such as in the press, on TV or computers, usually have a very limited impact on national sales

### Relative evaluation of selected channels (3/3)

Channels	Preferred Clients <sup>4</sup>	# of clients reached	Primary goal	Feasibility <sup>7</sup>	Cost per contact <sup>8</sup>	National sales impact	Preferred applications
<b>Press ads</b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>3</sup></li> </ul>		<ul style="list-style-type: none"> <li>Awareness</li> <li>Reminder</li> </ul>	+++			<ul style="list-style-type: none"> <li>New information (brand launch, indication, medical environment...) to be conveyed</li> </ul>
<b>Computer ads</b> (screen savers - popup windows...)	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>3</sup></li> </ul>		<ul style="list-style-type: none"> <li>Awareness</li> <li>Reminder</li> </ul>	+++			
<b>TV - IDTV<sup>1</sup> ads</b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>3</sup></li> </ul>	/	<ul style="list-style-type: none"> <li>Awareness</li> <li>Reminder</li> </ul>	++			
<b>Web / Web 2.0</b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>3</sup></li> </ul>	/	<ul style="list-style-type: none"> <li>Awareness</li> <li>Conviction</li> <li>Experience sharing</li> </ul>	+++			
<b>Handovers<sup>2,3</sup></b> (gimmick, special issue, device...)	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>3</sup></li> </ul>	/	<ul style="list-style-type: none"> <li>Awareness</li> <li>Reminder</li> </ul>	++			<ul style="list-style-type: none"> <li>Brand memorization for new or established products</li> </ul>
<b>Smartphone apps</b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>3</sup></li> </ul>	/	<ul style="list-style-type: none"> <li>Information</li> <li>Reminder</li> <li>Follow-up</li> </ul>	+++			<ul style="list-style-type: none"> <li>In addition to a connected-tool</li> <li>Reminder to increase compliance</li> </ul>
<b>Social media</b>	<ul style="list-style-type: none"> <li>HCPs<sup>5</sup></li> <li>Patients<sup>3</sup></li> </ul>		<ul style="list-style-type: none"> <li>Awareness</li> <li>Information</li> </ul>	+++			<ul style="list-style-type: none"> <li>Communication on the company, social responsibility and events</li> </ul>
<b>Sponsorship / grants</b>	<ul style="list-style-type: none"> <li>Specialists (hospital or open care)</li> </ul>		<ul style="list-style-type: none"> <li>Loyalty reinforcement</li> </ul>	+++			<ul style="list-style-type: none"> <li>Well-known brands</li> <li>Specialized brands</li> </ul>

Digital channels

Evaluation: High Medium Low

+++ : Easy ++ : Intermediate + : Difficult

Sources: Smart Pharma Consulting analyses

<sup>1</sup> Interactive digital television – <sup>2</sup> To stimulate brand memorization – <sup>3</sup> Depending on local regulations –

<sup>4</sup> Actual and potential – <sup>5</sup> Health care professionals – <sup>6</sup> Technical, legal... – <sup>7</sup> Per effective contact

## 4. Conclusions

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### Pharma marketing will need to keep on adapting to the emergence of digital technology, while measuring its actual impact on brand performance

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#### Key learnings

- If the digital technology offers new ways to interact with healthcare professionals, the impact of digital marketing initiatives on national sales is relatively low, and should not be viewed as a panacea
- Consequently, it may be recommended to integrate digital tactics within multi-channel marketing, as an add-on to traditional promotional channels...
- ...but probably not as a substitute to face-to-face calls which is the only one means that enable to reach effectively thousands of physicians
- Marketers should be as rigorous to assess the impact of digital marketing investment as of traditional one
- Regarding patients, digital tools like website, blogs and social networks can be used to increase companies' awareness, communicate on health events while patient communities, smartphone applications and connected devices can help to increase the proper use of a drug (including compliance) and to collect data
- Once collected, this information, called “Big Data” or “Big Health Data”, can be analyzed to have a better knowledge of patients and this will intensify preventive and personalized medicine (for instance the analysis of user researches on a search engine has permitted to quickly detect the outbreak of a flu epidemic)
- In the near future, connected devices should enable continuous analysis of biometric data of patients
- Thus, pharma marketing will need to continue its evolution to fit the changing environment, even if a revolution is not expected

## Core capabilities

### Management **2**

- **Facilitation and structuring of strategic thinking for multidisciplinary product teams**
  - Key challenges identification
  - Strategic options formalization
  - Resource allocation optimization program
- **Training of marketing and market research teams to sales forecast techniques (modeling and scenarios development)**
- **Development and implementation of a "coaching program" for area managers**
  - Sales reps coaching
  - Regional action plans roll-out
- **Development and implementation of a "sales techniques program" for sales forces (STAR<sup>1</sup>)**

<sup>1</sup> Sales Techniques Application for Results (training course)

### Strategy **1**

- **Assessing the attractiveness of markets** (Hospital / retail innovative products - Vaccines - OTC - Generics)
- **Growth strategy**
  - Optimization of marketing / sales investments
  - Development of a company in the hospital market Business
  - Valuation for acquisition
  - Portfolio / franchise assessment
- **Extension of product life cycle performance**
  - Improvement mature products performance
  - Adaptation of price strategy
- **Defense strategies vs. new entrants**
- **Competitive strategies in the hospital market**
- **Strategic partnerships companies / pharmacies**



### Organization **3**

- **Rethink of operational units organization**
- **Improvement of sales force effectiveness**
- **Improvement of the distribution channels covering the hospital and retail markets**
- **Development of a strategic planning process**