

Study on Impact and Acceptance of Digital Marketing over Traditional Marketing in The Indian Pharmaceutical Market and To Evaluate the Challenges for Pharmaceutical Digital Marketing in India.

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ABSTRACT

In the generation of Digitalization, information technology and marketing mix, the growth and establishment of digital marketing has gained enormous popularity and growth among the marketers in many sectors and is proved to be effective, in this era of digital evolution above 90% of the RMP has access to the internet and 76% of healthcare professionals in India use digital health records 21 , where more than half of the Indian population has access to internet and are seeking medical opinion online, hence the medium of marketing cannot be ignored and the recent crisis of COVID19 has forced the Indian Pharmaceutical Marketing sector to evolve into more effective and advanced needs to adopt to the new and emerging techniques in order to reach the goals. The current research intends to study the significance and impact.

Key Words: Pharmaceutical marketing, Conventional marketing, Traditional marketing and Digital marketing.

1. INTRODUCTION

Concept of Pharmacy

It is generally believed that the Indian Pharmaceutical industry originated in the early 19 Century, where the medicines were imported by the British for their personal use, which led to the beginning of the pharmaceutical industry in India, later it ultimately took over the country due to the widespread use and the decline of other systems of medicine. The actual production of these medicines was started in 1901 with the establishment of Bengal Chemical Works, by pioneering efforts of Acharya PC Ray.

The First World War gave a great surge for domestic production of pharmaceuticals as there was steep increase in demand and drastic cut in imports. The manufacture of surgical dressings was also taken up during this period¹.

By delivering high-quality drugs at scale, the Indian pharmaceutical industry has built a strong presence in the global generics market. The industry has pioneered new processes and formulations, establishing itself as a dependable, high-quality, and cost-effective global drug provider. The industry has captured a leading share in developed economies such as the United States (1 out of every 3 pills 719) and the United Kingdom by making critical drugs affordable and available (25 percent of medicines consumed 729).

The industry is currently worth over USD 38 billion, with the potential to expand to USD 120 to 130 billion by 2030 if the vast opportunities that lie ahead are taken advantage of. To achieve the aspiration of an eleven to twelve percent CAGR, all stakeholders - Indian pharmaceutical companies, the government, and regulatory agencies, - must work together. To regain its status as a world-class supplier of affordable high-quality medicines, Indian pharmaceutical companies must make bold strategic steps into uncharted geographies, products, and technologies. Government support in the form of investments, policy support, and regulatory interventions is critical to accelerating this innovation-driven development. By encouraging greater cooperation between the two.

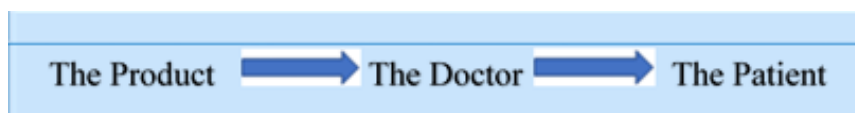


Figure1-Flow of pharmaceutical product

Figure-2: Pharmaceutical Market Forecast- Overview⁴

Marketing

“Marketing is a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and value with other” - Philip Kotler.

THE PHARMACEUTICAL MARKET

The Indian Pharmaceutical market is ever changing as from the beginning of its origin in the early 19th Century till date, however Marketing is one of the key segments in the pharma industry considering the Legislative and Regulatory guidelines of India.

The Traditional forms of marketing are the only known techniques in the pharmaceutical industry where the patient needs are fulfilled through the RMP and/or HCP.

Where the doctor serve as the Intermediate Customer and the patient is the End Consumer. Hence it is very Vital to keep up with RMP/HCP to reach the desired goals, considering the different market segmentations and dimensions,

Although the traditional ways of meeting with the Doctors was the only way to grab the market share the recent evolution of digital marketing could be a game changer when adopted in the best possible way into the pharmaceutical marketing.

In the rise of the recent events and the COVID crisis there has been Signiant changes the way the Indian healthcare systems are responding to the same amid this the marketing segment has faced numerous challenges in meeting with the HCP/RMP, for the sole purpose of marketing and brand reminder. The empowerment of consumers through the aid of technology is changing the way Indian Healthcare and Pharma sectors' functioning.

Amid the legislative and regulatory frameworks there are considerable opportunities available for the digital marketing in Indian Pharma Business³.

The digital transformation within the Pharma sector has been greatly accelerated by COVID19, many people- side by side are also purchasing the medicines online which leads to greater competition than the earlier³.

Telemedicine, AI, enabled devices the blockchain electronic health records are just few examples of digital transformation⁴.

However, the Indian Pharmaceutical Industries have lagged when it comes to implementation of the digital strategies though there are immense opportunities in the same, and it is necessary to study the challenges with respect to the same.

The survey of 2018 shows that only 7% of health and pharma companies said that they have adopted digital technologies for marketing compared to 15% of companies in other industries¹³. Web marketing is not that well adapted by the pharmaceutical sector. The cautious behavior of the sector, which is combined with uncertain regulation, held back pharmaceuticals sector while marketers in finance, professional services, manufacturing, and business services have raced ahead online⁵.

However, online professional, and patient communities have developed to adapt increased usage of mobile, social media as well as online information by patients, healthcare professionals (HCP), key opinion leaders (KOL) and the larger medical fraternity have instigated pharmaceutical companies to invest and explore digital marketing strategies within industry guidelines⁶.

80% of doctors check product information online. 74% of doctors wants to communicate with MR regarding new drugs, 68% wanted to limit the interaction to once in a month and only 33% thought that such interactions add value to their practice⁷.

Hence the need is to study, evaluate and analyze the significance and the challenges of Digital Marketing in the Indian Pharmaceutical Marketing and to precisely evaluate the impact of the same in the Gastroenterology of Bangalore and General Physicians of Jaipur, respectively.

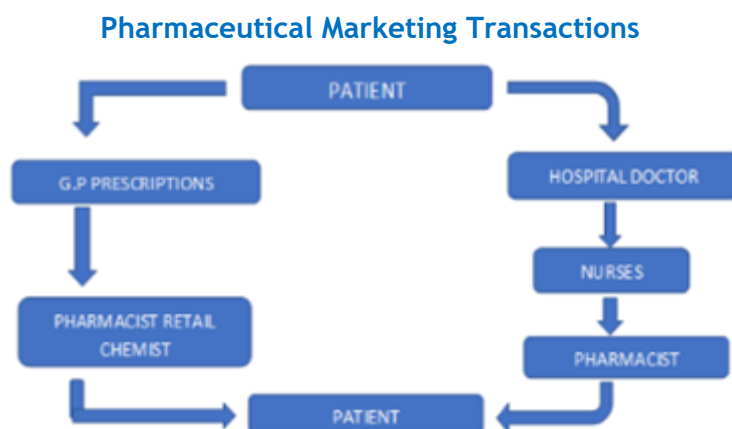


Figure-3: Pharmaceutical Marketing Transactions⁵.

Pharmaceutical Marketing

Pharmaceutical marketing is defined as a management process that serves to identify and meet patients' needs in a profitable way. Pharmaceutical marketing is focused on making physicians as well as the public aware of new and existing pharmaceutical brands, pharmaceutical marketing include giveaway samples, detailed product literature, disease management programs, and support material for patients, internet initiatives and events/meetings for physicians.

Traditional pharmaceutical marketing

Traditional marketing is referred as a kind of marketing that is not online. Traditional pharmaceutical marketing structure differs from other industries. Personal selling is most important way of marketing in pharma industry. Detailing is most adopted way of marketing in which sampling and other promotional work among doctors and professionals, to secure good will and possible distribution or prescription of the product. Sales representatives are the focal resources for applying most of the techniques. The adopted tools of promotion for this technique are drug information brochures, literature, drug samples, giveaways.



Figure 4 - Traditional pharma marketing¹

Digital marketing

"I think the biggest innovations of the 21st century will be the intersection of ...biology [health, medicine] and technology [digital]. a new era is beginning..." -Steve jobs.

Digital marketing, even known as online marketing, is a marketing technique that promotes products and services via the internet and internet-based digital devices like desktop computers, mobile phones, and other modern media and networks. In addition to the technical advances, it is all about implementing novel strategies to traditional marketing.



Figure 5 - Digital marketing⁹



Figure-6 Omnichannel Marketing

Omnichannel marketing

The multichannel strategy centres around the HCP which offers a seamless, cohesive interface for the consumer across all networks, which is referred to as omnichannel.

Omnichannel marketing means that the message is consistent regardless of which medium the HCP uses.

The HCP has access to both networks, which are cross connected.

Research Problem

Even after facing a very strict environment into traditional marketing, where an HCP was not able to meet the company representative in person, the marketing wing is forced to find better ways of meeting the HCPs amid the given COVID19 crisis and the digital evolution into the marketing segment of the India Pharmaceutical Industry, there has been a setback to achieve the desired success in the same, even after facing a very strict environment into traditional marketing, where an HCP was not able to meet the company representative in person, the marketing

At a higher pace than the rest of the world, every industry has adapted to the modern age. However, apart from the internet and apps, the pharmaceutical industry has yet to fully embrace digital marketing⁸.

Even after the Innovation in the technology and advanced market mix there has been a draw back in attaining Digital marketing into the pharmaceutical sector, So, it becomes essential to know the factors that are affecting the digitalization of pharmaceutical marketing in India, and the impact of the same over traditional marketing.

Research Objectives

1. Evaluate and understand the best marketing model in present COVID19 scenario in pharmaceutical sector with respect to the healthcare professionals and medical representatives.

2. To know which is more efficient and effective means of marketing in the present scenario of the Pharmaceutical Industry in the therapy segments of Consultant and General Physicians.
3. To study and extrapolate the different types of digital platforms used by the pharma companies for the purpose of Digitisation at the time where traditional modes of marketing could not fetch the desired results
4. To gather the opinion of healthcare professionals and pharma medical representatives regarding which modes of marketing is more convenient and acceptable in present situation and forecasting the next generation of marketing basis the opinions and results.

Value of the Study

Marketers, corporations, government officials, and academics can profit from the research. This research may be able to educate marketers about the effects of digital marketing on a doctor's prescribing behaviour, as well as assess the challenges of digital marketing in the Indian pharmaceutical industry, and whether combining digital and conventional marketing will be successful in reaching and growing customer interest, and ultimately market development.

Before adapting marketing practises to the Internet, it is critical to consider the characteristics of online digital marketing customers who are physicians, as revealed by this report. As a market, the Internet has risen in popularity.

The government could develop a better understanding of the value of digital marketing and its impact on consumer decisions, which directly effects patient and public services, because of this study, and would be able to efficiently regulate how digital marketing is delivered by acting rationally on laws that restrict Pharma Marketing, creating an environment, and offering support to digital marketing firms.

For academics and researchers, the current study forms the basis for future investigations on digital marketing in the Indian pharmaceutical industry. Academicians, researchers, and customers can find the observations useful in understanding different concepts applicable to PHYGITAL Marketing.

Research Introduction

Marketing is a tool to increase the market share, we can explain this in simple words that identifying the needs and wants of the people, and creating the product and services to meet the people needs and wants, developing a plan to take the product and services into market place, estimation of the value of the product and services, segmentation of the people, determining the way of communicating the product and services in market place, creating the a transaction for exchanging the product for value and creating the satisfaction to the buyers needs and wants⁹. Marketing has started way back in early 1920's initially it was started with production ,when there was monopoly market and then the demand of the product had increased lead to competitive market which gave the concept of sales, in sales it was all about the selling their product and beat the competition, but there was no customer centricity, and no preference to customer satisfaction, which lead to marketing, when customer became selective companies started focusing on the customer needs and wants, based on that they started production.

At initial stage pharma adopted the controlled practices, after that it became fast moving consumer goods (FMCG). Traditional marketing is all about applying tools and techniques by the sales representative, like drug information brochures, literature, drug samples, giveaways. It is still in present in this era, though there are so many countries has started implementing technology and tools into marketing, in India it is still in initial stages up to pandemic hit. Now Indian market started moving towards the digital marketing and adjusting, learning and adopting to the digital marketing.

In this we get to know about the factors which are showing more impact on transforming traditional market into digital market, and factors which shows why digital marketing is needed to be implemented, present customer preferences and how their digital knowledge is favouring the digital marketing, why India cannot transform into complete digital marketing, and concept of PHYGITAL marketing and the importance of this marketing.

PHARMACEUTICAL MARKETING

Is all about focusing on market physicians as well as the public aware of new and existing pharma brands, it includes giveaway samples, detailed product literature, disease management programs, and support material for patient, internet initiatives, and events meetings for physicians.

It is a management process that serves to identify and meet patient needs in a profitable way. It mainly adopts the sales and promotion, the branch of marketing¹⁶.

TRADITIONAL PHARMACEUTICAL MARKETING

Marketing of pharma product is all about introducing the pharma product in front of the customers. In this field usually they are consumers or the drug prescribers (doctors, healthcare professionals) to deliver the things more effectively marketers should have clear understanding of target customers.

Pharma marketers should know the needs, what they want, what drives their purchase decisions, and what influence their behaviour⁹.

Traditional marketing techniques

Advertisement-directed to consumers advertisement (DTCA) advertisement in mass media through books, journals, publications, conference electronic media. Continuous medical education (CME) this became tool for pharma marketing by inviting physicians or opinion leaders as speakers in educational events, lecture excursion, symposia. CME increasing the prescription rate and they promote their image as a responsible organization of the society to use corporate social responsibility concept.

Personal selling- it is most important way of drug promotion. Detailing is most common method is used by pharma companies, in this personal sampling and promotion work is done among professional persons done for pharma concerns. sales representative is the key person who adopts and applies the techniques and tools to promote the product. Mainly those tools include the drug information brochures, literatures, drug samples.

Sponsorships- companies try to make direct payments to the physicians in the clinical trials against national and international conferences, medical camps, and opinion leaders for health care professionals⁹.

Digital Marketing

Almost all other industries have adopted and moving in faster pace with digital marketing, and they are getting high ROI¹². Indian digital marketing has been growing with the pace of 25-40% annually. Which has started around 2010. India is well on the way to be the fastest growing online retail market in Asia.

The global pandemic has caused pharma companies to invest in digital marketing, as healthcare systems across the world adapt to strict lockdown rules.

Chances of meeting doctors (face to face) became so thin, it became biggest problem to meet doctors by medical representatives.

Pharma digital marketing helping sales representatives to contact with doctors, as we know recent pandemic changed everything in upside down manner and it became more difficult to the pharma industry to get adopted to new changes, as we know that almost all industry sectors have already adopted the digital marketing, but when it comes to the pharma industry it was not that easy to get adopt to new changes.

Digital marketing gave some small ray of hope to reach out to the customers.in pharma there is no doubt in the customized data and information providing to their customers. Like information channels, interactive dialogues, sponsored or corporate communities that span multiple disease and issues impacting customers and companies are enabling more engagement and perceived value from pharma companies.

Though some Indian companies have already adopted and implement the digital platforms and user-friendly mobile apps like sun pharma introduced the app for asthma awareness and treatment regimen. Abbott introduced the genie, a heart and liver app and vertigo exercise. still there is only 4% of the companies adopted the technology¹¹. Still there is lot more improvement is needed in the digital marketing¹¹.

In past few months Pharma digital marketing in India become the core of marketing campaigns, and the pharma marketing covered by different digital channels like media, messaging, web, mobile, social network.

Why digital marketing over traditional marketing.

According to the findings it says that all over the world pharma companies invest 50% of their budget on the marketing and sales than the research and development. In simple words companies spends nearly twice as much on marketing as on the R&D.

What is more interesting, however, is that nearly all big pharmaceutical firms are now setting aside more dollars for sales and marketing than they do for research and development.

In one year alone, the 10 largest pharma companies spent a little shy of \$100 billion on marketing, with less than \$66 billion going to R&D.

Take Johnson & Johnson, for instance. The perennially big spender ear-marked \$17.5 billion for sales and marketing while spending only \$8.2 billion on drug research and development.

The same goes for the rest. Even the smallest spender on the top ten list, AbbVie, dedicated \$4.3 billion to marketing, compared with \$2.9 billion for R&D.

Drug makers spend an average of \$3 billion annually on direct to consumer marketing, while the lion share of around \$24 billion goes to selling and marketing directly to clinicians and other healthcare professionals, as per PEW¹².

Scope of Digital Marketing

1. Digital marketing provides better exposure for pharma companies to reach out to the customers (patients (end user), drug prescriber (doctors, (healthcare providers))). Digital marketing not only reduces the marketing and sales cost and time, also increases the target audience².

Pharma customers are doctors.

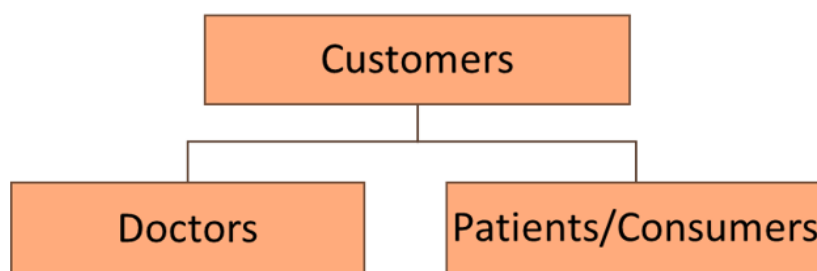
Figure7 -Pharma industry customers

Digital marketing provides better exposure for pharma companies to reach to the .it not only reduces the time consuming but also it saves the time along with increases the target audience reach¹⁵.

2. Digital marketing increases the company competency.it is not size of the company, it will be effective marketing strategy, well planned content and target delivery that attracts customers in pharma sector¹⁵.
3. Irrespective of size of the company it can compete with any company in pharma sector¹⁵.
4. It helps in the impact of its marketing effects. Also helps in the tracking and measuring consumer behavioural patterns, analyse consumer reviews and satisfaction.it helps in the uplift the scope for continuous improvement¹⁶.
5. Continuous communication with customer helps in the brand development¹⁵.
6. It gives better overall insights about customers to pharma companies¹⁵.
7. It helps in the identifying the most suitable influencer on social media. We can decide most suitable influencer for target audience¹⁵.
8. According to studies adoption to the digital marketing helps in saving cost by 20-50% and provides the better results¹⁵.
9. In normal traditional way it is very tough to meet the doctor, but if it is in digital information will be available in online, they will go through it when they get few minutes¹⁵.

PHYGITAL - (TRADITIONAL+DIGITAL)

Based on Doctors behaviour and studies we can understand that doctors are not that interested in meeting medical representative each month. Doctors feel that they are interrupting the daily schedule and they even feel they are not getting enough information in those 3-5 min (average). Even they visit online websites after medical representative



meeting.

This explains the importance of digital marketing, digital marketing is as important as the physical marketing.

For better reach to the customers and health care providers it is common platform for the better services.

As per the rules and regulations we cannot shift completely from traditional marketing to digital marketing, it is best way to adopt the digital marketing along with traditional this is called PHYGITAL.

There are gaps between the customer requirements and service providing by the pharma company, this can be done by bridging the gap with the help of adopting the PHYGITAL structure into the marketing.

Integrated approach will improve the overall experience of the consumer into seamless journey. According to studies that good omnichannel engagement results up to the 90% retention of the customers.

Choosing the correct platform for the digital marketing is the one of the most important steps. Not every social media work for every pharma company, strategy, and planning play important role in this PHYGITAL marketing.

With the help of positives and negatives of traditional marketing and digital marketing, we can fill the gap with the help of new model PHYGITAL mode¹⁷.

2. RESEARCH METHODOLOGY

Research Design

Descriptive analysis has been used in this study. Descriptive analysis entails collecting details about activities, then compiling, tabulating, depicting, and describing the information gathered (Glass & Hopkins, 1984). It often employs visual aids such as graphs and charts to assist the reader in comprehending the data delivery, providing a comprehensive understanding of the effect of digital marketing on doctor prescribing behaviour and determining the challenges of digital marketing in the Indian pharmaceutical industry.

Population of the Study

This study targeted Consulting and General Physician across Bangalore and Anantapur region because these two segments meet with more number of pharmaceutical/ MR as compared to that of any other speciality, and these two segment indulge more with MR than any other speciality in the Field, wherein CP and GP constitute to more amount of doctors in total as compared with that of other speciality care, Hence they would be more suitable to understand the significance effectiveness and challenges of the Digital Marketing IN THE Indian Pharmaceutical Industry

The study also targeted the working Medical Representatives since they are working continuously are now exploring the digital marketing it would be useful to understand their perception about the Digital Marketing in contrast to the response, support, and encouragement they receive from Healthcare professionals.

Sample Design

Stratified sampling technique was used to select the units for study, where the Physician and the Medical Representatives both were stratified into smaller groups comprising of 50 doctors and 30 Medical representatives, the respondents were randomly selected from each stratum to come up with the respondent sample of 50 Doctors and 30 Medical representatives for the entire population. This way the viable sample technique since it gave the advantage of focusing on important sub population and allowed the use of different sampling technique for different subpopulation in improving the accuracy of estimation.

Data Collection

A structured questionnaire was distributed to 50 Doctors and 30 Medical Representative who were the respondents from the Bangalore and Anantapur regions, respectively, to collect primary data. The samples were surveyed online, and the given questionnaires were retrieved the next day after the respondents completed them, and the answers were used to analyse the results. To facilitate the respondent in completing the questionnaire, it included both open-ended and specific questions.

Validity and Reliability

The degree to which an instrument accurately describes the variables under investigation is referred to as content validity. In contrast to traditional marketing, the questionnaires included a variety of questions on knowledge and challenges of digital marketing in the Indian pharmaceutical industry. All subjects completed the questionnaires through online and telephone platforms to ensure there would be no confusion or mistakes made while recording their responses.

Reliability

Reliability can be ensured by reducing sources of measurement error like a data collection bias. The researcher being the only one in charge of the questionnaires and standardising conditions such as displaying identical personal characteristics to all respondents, such as friendliness and encouragement, data collector bias was reduced. The investigator conducted pilot testing to find any inconsistencies in the questionnaire to reduce calculation errors and ensure accuracy.

DATA ANALYSIS

The study used a nominal and ordinal scale to assess the effectiveness and impact of digital marketing on doctor prescribing behaviour and to assess the challenges of digital marketing in the Indian pharmaceutical industry, as well as an interval scale to assess the relationship between digital and traditional marketing in the Indian pharmaceutical industry. This data was analysed using descriptive statistics. To better understand the data, mean responses, standard deviation, and other related statistics were computed. The information gathered was compiled and edited to ensure that there were no logical inconsistencies. Following that, the data was coded based on the responses. To analyse and present the relationships between responses, as well as perception, tables and graphs were used. To uncover connections between variables, regression and correlation analysis were used in this analysis.

From the data it is seen that the doctors have a good amount of interest in meeting an MR not just face to face but on online digital platforms as well, but considering the current level of pressure from the pandemic it is highly important that the doctors engaged in an effective way in whatever the duration or modes they are met or seen, also the (probable) reason why majority of them are not comfortable to meet the MR on digital platforms just to listen to an MR reading out a visual aid but from the screen, just like traditional marketing, wherein the impact of physical presence and rapport also influences the comfort the doctor receives as a customer, which is one of the primary reasons why the doctors hesitate to meet MR online, and lack of effective engagement and complete of usage of the avg time of around 1-2 minutes, However the doctors are satisfied in terms the of getting the regular brand reminders from the respective MR. Which not just indicates the amount of interest the fraternity is providing towards the digital move of the pharma companies but also shows the support for innovation in pharma marketing. Despite their discomfort in accepting the complete transformation into the digital platforms they are however in majority willing or “ok” to meet the MR widely on digital platforms considering their safety, time and the Pandemic situations, as compared with the risks and time constraints associated with the traditional marketing by the MR and is the best time for us marketers to adopt new innovative patient centric, effective digital marketing strategies so that the growth can be accessed via digital medium along with the our long reigning traditional marketing methods.

RESULTS AND DISCUSSION

The study targeted 50 respondents from Healthcare and 30 respondents from medical Sales profession amid the pandemic, out which 50 doctors and 30 Medical Representatives responded and returned their questionnaire contributing to response rate of 100%, This response rate was sufficient, and representative and conforms to Mugenda and Mugenda (2003) stipulation that a response rate of 50% is adequate for analysis and reporting; a rate of 60% is good while a response rate of 70% and over is excellent.

This commendable response rate amid the strong second COVID19 wave was due to extra efforts that were made via courtesy calls made to remind the respondents to fill-in and return the questionnaires. The data analysis part of the article presents the information and findings based on the objective.

Table 1 Distribution of respondents by demography

Region	Frequency	Percentage
Bangalore	37	74%
Anantapur	13	26%

Source Filed Data

As shown in the Table 1, the study sample was representative of the Consultant and General Physicians across Bangalore and Anantapur, and mid the given crisis of the pandemic 74% of the total respondents were from Bangalore and the remaining 26% of the respondents were from Across Anantapur. The respondents were asked to provide their specialization, the study findings are provided in table below Table no 1.

Table 2 -Frequency of general and consultancy physician in Anantapur and Bangalore region

Specialisation	Frequency	Percentage	Anantapur	Anantapur	Bangalore	Bangalore
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			Frequency	Percentage	Frequency	Percentage
Consultant Physician	27	54%	8	61.53%	19	51.35%
General Physician	23	46%	5	38.46%	18	48.64%

Source: Field Data

The findings show that the General physicians were the major respondents making up 54%, followed by the Consultant Physicians at 46% of the study respondents, the same trend is being observed at the individual geographies of Anantapur and Bangalore collectively

The study sought to establish the average time spent per MR by an average doctor and the findings are established in the table 3.

Table 3 Average time spent per MR (Table and average value)

Time in Minutes	Frequency	Percentage
1-2	35	70%
3-4	10	20%
5-6	4	8%
>7	1	2%

Source: Field Data

As shown in the Table 6 the study sample response towards the time spent per MR says that Around 70% of the doctors spend around 1-2 minutes per MR and 20% of the respondents spend around 3-4 minutes per MR call and 8% of the respondents spend around 5-6 minutes per MR Call and only 2% of the Doctors would spend above 7 minutes per MR call, this indicates the amount of importance each minute carries and an MR is making the best efforts to reach the Call Objectives amid the shortage of time.

The respondent was also asked to indicate the average number of MR per day, the study findings are illustrated in the Table 4.

Table 4 Average MR per Day (Table and average value)

Number of MR	Frequency	Percentage
1-5	25	50%
5-10	19	38%
>10	6	12%

Number of MR	Frequency
1-5 members	25
5-10members	19
>10	6

$$- [(1+5/2) * 25] + \{(5+10/2)*19\} + [10*6]/50$$

$$- 3.5*25 + 7.5*19 + 10*6/50$$

$$- 87.5 + 142.5 + 60/50$$

$$- 290/50$$

-5.8 – Average no. of MRs meet a Doctor per day.

Time in minutes	Frequency
1-2 min	35
3-4 min	10
5-6 min	4
>7 min	1

$$- [(1+2/2)*35] + \{(3+4/2)*10\} + \{(5+6/2)*4\} + [7*1]/50$$

$$- 1.5*35 + 5*10 + 8*4 + 7*1/50$$

$$- 52.5 + 50 + 32 + 7/50$$

$$- 141.5/50$$

2.83 min -Average time one MR get to meet a Doctor.

Source: Field Data

The study indicates that 50% of the respondents would see 1-5 MR per day, and 38% of the respondents would see 5-10 MR per day and only 12% of the respondents would meet above 10 MR per day. This illustrates the number of MR an average physician is meeting and hence they feel it is time consuming and hectic to meet the MR.

Source: Field Data

The study indicates that on an average time one MR gets to meet a doctor is 2.83 minutes.

Table 6 Average number of MRs meet a Doctor per day.

Source: Field Data

Study indicates that on an Average 6 MRs meet a doctor per day.

Table 7- average time spend by a doctor towards medical representative in a

Average time one MR get to meet a Doctor -2.83 minutes.
Average no. of MRs meets a Doctor per day - 5.8.
Average time duration total MRs get in Doctor's schedule per day – 16.41 minutes.

Source: Field Data

Above calculations have been done based on the data, which indicates that on average one doctor spend nearly 17 min per day with total representatives.

To evaluate and outline the impact in adopting Digital marketing in pharmaceutical sector.

The first objective of the study was to evaluate and outline the challenges for digital Marketing in the Pharmaceutical Industry, the study sought to identify the willingness by the doctors in meeting the MR on different platforms in the first place, where they would be indulging in the effective discussions with MR, regarding therapy, product or a social problem, so in order to establish the means for the marketing one should know the amount of interest and willingness of a doctor to meet the MR and secondly the mode of meeting for the same.

To Evaluate and understand the best marketing model in present COVID19 scenario in pharmaceutical sector with respect to the healthcare professionals and medical representatives.

The respondents were asked to provide about their Convenience with respect to their schedule in meeting the MR the study findings are illustrated in the table 7.

Table 8 Schedule and Convenience of a doctor in meeting the MR.

Mode of meeting	Frequency	Percentage
Traditional	17	34%
Digital	14	28%
Hybrid	16	32%
None	3	6%

Source: Field data

The findings indicate that 34% of the respondents wished to meet the MR in the traditional modes, which involves face to face interaction, 32% want to meet the MR in Hybrid mode which includes both Face to face interaction like in Traditional Modes as well as meeting in the Digital modes while the 28% of the respondents wanted to meet only on Digital Platforms and the other 6% did not wish to meet the MR at all.

This indicates the interest in respondents towards the pharma companies is positive for both Digital and Traditional modes of marketing which is the HYBRID Mode of Marketing.

To know which is more efficient and effective means of marketing in the present scenario of the Pharmaceutical Industry in the therapy segments of Consultant and General Physicians.

Table 9 Comfortable to meet the MR on digital platforms.

Response	Frequency	Percentage
Yes	29	58%
Maybe	15	30%
No	6	12%

Source: Field Data

The study indicates that 58% of the respondents are comfortable in meeting the MR via digital platforms which increased exponentially as compared to that of the pre COVID19 pandemic scenario, the study also indicated that 30% of the respondents aren't sure if they are comfortable in meeting the MR via Digital Platforms, this also gives pharma marketing industry an extra edge in convincing and enable them to adopt to the digital mediums and gain the market share, which can happen only when the digital marketing is done with the sole purpose of giving the customer the Content which they are actually interested in and not just by representing an virtual VA, the remaining 12% of the respondents are reluctant towards meeting the MR, via digital platforms and there needs to be a different approach for these type of respondents to meet them face to face and then enable digital meets.

To study and extrapolate the different types of digital platforms used by the pharma companies for the purpose of Digitisation at the time where traditional modes of marketing could not fetch the desired results and outline challenges of the same.

The study sought to identify the different platforms that were used by the pharma companies MR to meet with customer especially during lockdown, and the findings of the same are shown in the Table 10.

Table 10 Platform used to meet the MR Online during the Lockdown of the first wave Covid19.

Sl.no	Platform	Frequency	Percentage
1	Phone calls	42	84%
2	Digital (Zoom, WhatsApp call)	28	56%
3	Emails	24	48%

Source: Field Data

The study shows that 84% percent of the respondents were engaged via the phone calls by the MR, while 56% of the respondents were engaged in ZOOM and WhatsApp application for talking with the MR and remaining 48% say that they were emailed to meet the bran reminding by the MR and the Pharma Companies.

To gather the opinion of healthcare professionals and pharma medical representatives regarding which modes of marketing is more convenient and acceptable in present situation and forecasting the next generation of marketing.

The second Objective of the study was to distinguish between the traditional and digital marketing with respect to the pharmaceutical marketing in the therapy segments of Consultant Physician and General Physician, the respondents were asked if they would be comfortable with the complete shift to the digital marketing from traditional face to face marketing and the finding are presented in the table 11.

Table 11- Comfortable with the complete shift to the digital marketing

Response	Frequency	Percentage
YES	12	24%
NO	27	54%
MAYBE	11	22%

Source: Field Data

Table indicates that 54% of the respondents are not comfortable with the complete shift to the digital marketing by the pharmaceutical industry, this is alarming as the doctors are not comfortable with the digital marketing alone and there is need for the new and evolved techniques in the Indian Pharmaceutical Marketing, where as 24% of the respondents said that they would be comfortable in the complete shift to the digital marketing which in positive note as compared to the perceptions toward the digital marketing at the pre COVID times, Ref- and the remaining 22% are in stated they might be comfortable with the complete shift to the digital marketing, Hence ideally considering the ones that are comfortable or might be comfortable as 46% collectively against the 54% of the ones that are not going to be comfortable it shows that there has to be a mixture of both the modes marketing in order to reach the goal as a marketer.

The respondents were further asked if they thought it was time consuming to meet the MR, the study findings are illustrated in the table 12.

Table 12 Time Factor to meet an MR % Chart.

SI No	Responses	Frequency	Percentage
1	Yes	30	60%
2	Maybe	12	24%
3	No	8	16%

Source Field Data

The study established that 60% of the respondents say that it is time consuming to meet the MR whereas 24% of the respondents said that it might be time consuming to meet the MR and only 16% of the respondents said that it is not time consuming to meet the MR.

This data also establishes that wide majority of the Respondents consider it is time consuming to meet the MR so in the current scenario it is important for the pharma companies to implement strategies where the Doctors feel that it is not time consuming to MR but is productive to meet with an MR.

To know which is more effective means of marketing in the present scenario of the Pharmaceutical marketing segment in the therapy segments of Gastroenterology and General Physicians.

The third objective of the study was to know which is more effective means of marketing in the present scenario of the Pharmaceutical Marketing segment in the therapy segment of Consultant and General Physician. Respondents were asked if they were currently satisfied by the digital marketing by an MR and their responses were tabulated in the Table - 13

Table 13 Satisfaction with respect to digital marketing by an MR

Response	Frequency	Percentage
Yes	29	58%
Maybe	12	24%

No	9	18%
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Source: Field Data

Based on the Table 58% of the respondents said that they are satisfied by the digital marketing by an MR, which is of a positive note for the further evolution of the digital marketing whereas 24% of the respondents said that they might be satisfied by the digital marketing by an MR while the remain 18% said that they are not at all satisfied by the digital marketing by an MR, these figures establish that there is a good amount of scope for the digital marketing where there also need emphasis on proper utilization of the resources in or to reach the customer satisfaction.

The respondents were asked which mode they would prefer to meet the MR in the new normal, the results are tabulated in the Table 14.

Table 14 Meet in the New Normal

	Frequency	Percentage
Digital	30	60%
Traditional	14	28%
Hybrid	6	12%

Source: Field Data

The study established that the 60% of the doctors would like to meet the MR in digital platforms in the new normal considering the safety and strict schedules, whereas 28% of the doctors would like to meet the MR in person that is Traditional modes in the new normal which an indication that the digital means are also needed in order to engage with the traditional modes and the remaining 12% of the respondents would like to meet the MR on HYBRID mode, which is less in the concentration but considering the level of satisfaction and their interest to meet the MR this is new start towards the new phase in the Indian Pharmaceutical marketing Industry.

Apart from the doctors the study aimed to establish the challenges that are existing in the traditional means from the Medical Representative who are the first point of contact to the customers and warriors for the successful functioning of pharma marketing if they were finding it difficult to meet the doctors during the Pandemic. The finding from the study was tabulated in the table 20.

Table 15 Difficult to meet the doctor.

Response	Frequency	Percentage
Yes	29	96.66%
No	1	3.33%

Source Field Data

In the above table - has made a strong establishment that 99.66% of the field workers aka Medical Representatives are finding it difficult to meet the doctors in person to reach their call objectives, whereas only 3.33% of the field force disagrees.



Figure 8 - Difficulty faced by medical representatives during lockdown.

The study established to find the Impact and challenges for digital marketing in the Indian pharma industry suggested that the doctors or more precisely the physicians who are the respondents of the survey spent approximately around- 2.83 minutes per call with an MR, where one must make the maximum in under 3 minutes of the time, which is in loop with the IQVIA HCP Space survey, In 2019, pre-COVID19 pandemic days, 39 percent of physicians said they spent an average of 3 - 5 minutes with a medical official, and 27 percent said they spent less than 3 minutes. (Ref The Role of Digital Technology in Sales Team Performance and Development .¹⁸ which practically is a tough job on the MR. The study found that there has been tremendous increase in the convenience by a doctor in meeting an MR on digital Platforms and there has been considerable changes in how the doctors were approached via Non Virtual platforms and the Traditional means of meeting a doctor in new normal considered a grave risk and challenge given the current COVID19 pandemic, government and Hospital regulations this also indicates that costumers are interested and Co-operative towards Digitisation This data abides with IQVIA Data which suggest there is high adoption of non-face to face engagement modes between HCPs and Pharmaceutical companies since Covid19 which is indicating that the HCPs have accepted the change and embraced the new normal

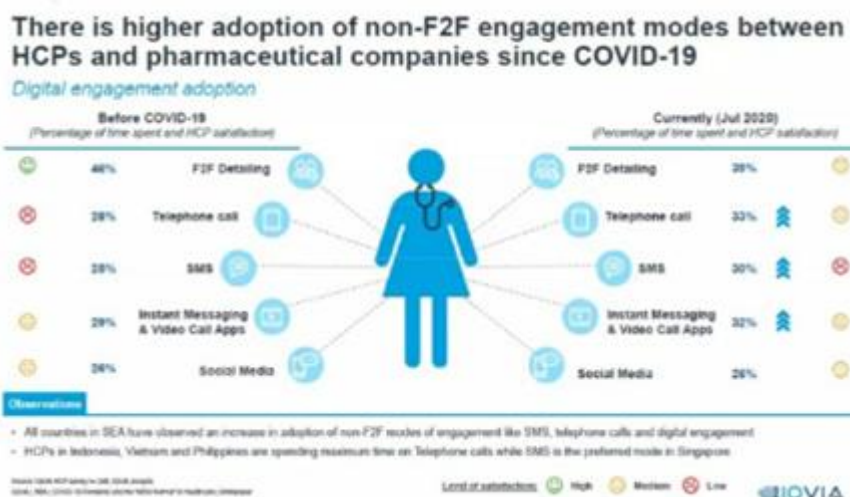


Figure 9- Digital Engagement Adoption.

This study sought to evaluate the different platforms used for the Digitization and the results of the survey conducted are in loop with IQVIA Regional level, platforms that are actively

utilized and well received in facilitating pharma HCP Engagement which suggest that Zoom, Phone calls SMS and WhatsApp were Highest used platforms to engage with MR, followed by E mails to the respondent. The study found that Phone Calls was highly used by the MR to approach a doctor during the recent Lockdown, and this correlated to the IQVIA data which said 85% of the HCP are willing to continue using telemedicine post COVID19.



Figure 10- Most actively utilized platforms.

The results of the survey are indicating that though there the HCPs are comfortable and convenient in meeting the MR on digital Platforms, they are not ok in the complete digitization of the pharma marketing. This is because today's doctors have a plethora of online resources to learn about new drugs. In the e-Pharma Physicians Annual Study, 51% of doctors said that they are already aware of the drug information that representatives provide. They now expect representatives to go beyond the basics and deliver higher value to their practice ¹⁹.

The doctors are hesitant for complete digitisation in the new normal as Some pharma marketers mistakenly equate digitizing with detailing but e- detailing is just one element of a broader, more comprehensive digital strategy. Digital should become a mindset across functions and hierarchies for it to truly benefit pharma-physician engagement ¹⁹ And hence the Doctor do not want to hear a brand name or an information which he already knows and further waste his or her valuable time, and therefore they often ask or insist the MR to just give the Brand name and not waste any more of his or her Time, so it is very important for pharma companies to emphasize on the Content on the digital platforms, not just an E-detailing and the adequate strategies with respect to the same.

So, at the time were majority of the doctors feel that it is time consuming to meet an MR and sometimes the doctors even object to meet with the MR one must understand that Handling objection in sales especially in pharmaceutical marketing is the toughest part which each one must come across, but it will give you a new opportunity to represent your brand in a different way to handle the objections. Handling the objection in an appropriate manner opens some key business accounts and boosts your sales (Medicine Man, 2012), and there needs to be a proper strategy for both digital and Traditional modes of marketing and this current state of no to meeting an MR can be overcome by approaching a doctor with Customer centric approach rather than only Product centric approach. And give the customer beyond the pill experience.

The study found that majority of the respondent said that they were satisfied by the current digital marketing but one has to carefully understand that this is in contrast to the Pandemic and the pre Covid19 Traditional marketing where they were still given an information they are well aware off and that it is still considered time consuming to meet an MR even if it is for less than 3 minutes and also they are reluctant toward the Shift to the digitization, this indicates that Digitization alone might not be the solution and Not finding it convenient in traditional means that it is hight time that the Pharma Combine both and develop a mode where Efficiency and Effectiveness are both met that is PHYGITAL.

The study Finding was found to be in Contrast with the study conducted by Accenture: Reinventing Relevance New Models for Pharma Engagement with Healthcare Providers in a COVID-19 World, Accenture Healthcare Provider Survey May 2020^[22].

People who see the physician, dentist, pharmacist, and nurses with the purpose of influencing these healthcare professionals to buy, recommend, or prescribe a product. They are called as Medical Representatives (MR) / Pharmaceutical Sales representatives (PSR) / Pharmaceutical Company Representatives (PCR). Medical rep is the vital communication link between the drug manufacturer and the medical professional. He/she is the most reliable source of feedback on what is happening to a company's product in the competitive market, the customer's perception, and sales strategies. Medical representative act as a link between a company, stockiest and customers and ensures the smooth working of the entire network¹⁹.

With that said the data it is seen than only less than 4% of the respondent considered it is not difficult to meet the Doctor whereas the remaining 96% agree that it is difficult to meet the doctor on only Traditional or on only Digital platforms which is huge and hence there needs a new and better ways where an MR can meet with the doctor and still develop the Rapport and this can be enabled by the PHYGTAL model where both on and off the field engagement with the customer is carried out, and the expectation by the customers could be reached making use of adequate strategies and with active CRM in right time and place (The present qualitative study found that the majority of the physicians had positive interactions with medical representatives. The physicians' main reasons stated for allowing medical representatives' visits are the social contacts and mutual benefits they will gain from these representatives. They also emphasized that the meeting with representatives provides educational and scientific benefits. A few physicians stated that the main reasons behind refusing the meeting with medical representatives were lack of conviction about the product and obligation to prescribe medicine from the representative company. Most of the physicians believed that they were under marketing pressure to prescribe certain medicines²⁰).

4. SUMMARY

The study found that the impact of digital marketing in the prescribing behavior of the doctor was dependent on various parameters such his or her personal interest in meeting an MR on Digital Platforms we found that on an average a doctor spend around 3 minutes per MR call and this time is very valuable looking into the investment per call which is of variable with respect to the pharma companies and it is of utmost important to make the best use of these 3 minutes of call duration by an MR, and as we had hypothesized the regulation and legislative by the government impose much of a challenge, but was proven wrong as this hypothesis might stay strong in terms social media marketing and not for the digital marketing as we see there are significant digital campaigns running

under the speculated framework from the government, and as we had also hypothesized that the absence of face to face interaction with the customers who are the doctors would lead to significant changes in the prescribing behavior of the doctors this hypothesis has been proved right and also we found that traditional alone is not an effective option however when the respondent confirmed that they are comfortable in ,meeting an MR on digital platforms at COVID19 situation but are not comfortable in the complete Digitization by the pharma companies, it was concluded that the doctors though are comfortable in the meeting the MR on digital Platforms but would not wish to be completely engaged only via digital platforms there comes the concept of HYBRID MODEL called as PHYGITAL MARKETING where a doctor is engaged on online platforms with effective strategies, the long running traditional Marketing should also be equipped with new innovation of Customer centric and Content Driven engagements with that the face to face interaction would also be enabled, and helpful in maintain the rapport from the study we can say that Phone calls, ZOOM calls, WhatsApp and SMS were the prominent platforms used by the Pharma Companies in order to meet with the doctor of Bangalore and Anantapur with the sole purpose Brand reminder and it is this digital and only Brand centric approach that has made them reluctant to the Digitization of the Pharma marketing. Hence it is important for the Pharma companies to have customer centric approach and beyond the pill experience to the doctor at digital platforms and have adequate CRM and Content driven Traditional marketing technique to reach the highly needed Customer satisfaction and Brand Growth.

CONCLUSION

The study objective was to evaluate the impact and challenges for the digital marketing in the Indian Pharmaceutical Industry at the therapy segment of Consultant and General physicians of Bangalore and Anantapur, it was found that on an average a doctor spends 3 minutes per call by an MR and is satisfied with the call in the opinion where the sole purpose of the call is for Brand reminder, there has been a significant changes in the functioning of the Pharma Marketing in the new normal and is also posing a great opportunity to the pharma companies to adopt to the next gen marketing techniques, while 38% of the doctors wanted to meet the MR in traditional face to face mode, 32% of the doctors wished to meet the MR on Hybrid model that is PHYGITAL MARKETING, and 28% of the doctors wanted to meet the MR on digital Platforms.

The study Concluded that the doctors considered it to be time consuming to meet the MR where the sole purpose of the call is Brand reminder, and are convenient in meet the MR on Digital Platforms which also pose a major challenge since they are satisfied by the digital call but are reluctant toward the complete digitization of the Pharma Marketing this could be due to the reason that doctors say that they already know the contents what an MR has to deliver to the doctor and as they say that it is time consuming to meet the MR it is really necessary for the pharma Companies to work toward the Content they have to provide to the doctor and have an costumer centric approach and convert the opinion of time consuming into Informative calls, The study further concluded that the doctors are consider it to be time consuming to meet the MR and are comfortable in meeting an MR on digital platforms it is now that the pharma Companies should combine both the modes of marketing and create a PHYGITAL MARKETING environment where Omnichannel marketing is utilized effectively and doctor is met on digital platforms and Traditionally the main difference is

that the CONTENT IS THE KING in this type of marketing and customer centricity is enabled along with Beyond the pill experience to the doctor should be provided and with that alone there can be a change in the MR and Doctor relationship is functioning, The study Further concluded that the doctors have embraced the change in the marketing by the pharma company as they were engaged via the Phone Calls, ZOOM Call , WhatsApp and SMS during the recent transition into the digitization and OMNICHANNEL marketing is to be still incorporated by the Pharma Marketing due to the COVID19 pandemic which is loop with IQVIA data and suggests that they have accepted the changes but there need to be more effective strategies in order to meet the sole purpose of CONSUMERISM and Brand Growth

SUGGESTIONS FOR FURTHER STUDY

Since this study explore the impact and challenges for the digital marketing in the Indian Pharmaceutical Industry in the therapy area of Consultant and General Physicians, and found that both Traditional and Digital need to be established in a proper and adequate manner, It is suggested that similar study to be conducted across various regions of the country and enable the generalization of the concept of PHYGITAL MARKETING, by the avoiding the limitations of the current study which is lesser respondent and the Pandemic, and establish strong data.

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ACKNOWLEDGEMENT

Firstly, we would like to take this opportunity to thank the IIMR University for having project as a part of the MBA Curriculum. We are to grateful DR. ASHOK PEEPLIWAL who has given us the opportunity to learn at deep level to prepare this report and supported us throughout this project with utmost cooperation and patience. We express profound sense of gratitude and sincere thanks to the all the respondents who actively took part in the survey and provided their valuable time and support in completing this project.