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Why is a romance burgeoning between pharma and telehealth?

An analysis of how these growing alliances can enable the pharma sector to seek more effective ways to reach out and communicate with prescribers and KoLs



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Pharma marketing is an area where one-on-one interactions reigned before the pandemic. But, as the coronavirus outbreak severely curtailed physical interactions, almost overnight, it became essential for the pharma industry to embrace newer ways and approaches to communicate with its key audiences – prescribers and patients.

So, as pharma marketers redraw their plans to cope with the new normal, we are witnessing a burgeoning romance between pharma players and telehealth and/or physician-only platforms.

Express Pharma approached pharma players, telehealth platforms and industry observers to understand the causes and implications of this development. What we found is that these alliances signal paradigm shifts in pharma marketing such as:

Changing behavioural patterns

Traditional models of marketing are getting replaced by newer ones supported by digital technologies. But, what's interesting is that this trend is likely to continue long after the pandemic subsides.

A report released in early June by Indian Pharmaceutical Alliance (IPA) and Boston Consulting Group (BCG), highlighted how imperative it is for pharma and healthcare companies to engage with prescribers through digital avenues. The report also revealed that "with restricted access becoming the new normal, 70 per cent prescribers are willing to continue engaging with healthcare companies through digital mediums and 60 per cent prescribers are inclined to continue virtual interactions with salespersons."

Stakeholders, partners and observers of the pharma industry corroborate these findings.

Sudarshan Jain, Secretary-General – Indian Pharmaceutical Alliance, points out, "COVID-19 has impacted the traditional way of doing business and we are likely to see an increase in the emergence of technology platforms."

Sharad Tyagi, Managing Director, Boehringer Ingelheim India, informs, "Pharma industry has been evaluating the potential of digital platforms globally as a way of offering appropriate and customised solutions to doctors and other stakeholders. What coronavirus has done, is jolt the industry into overdrive in implementing several such initiatives because the traditional model of communicating face-to-face in doctors' clinics was severely disrupted."

He adds, "The industry, especially well-organised players, have had a very successful experience in digital interactions with doctors. Doctors in India are open to adopting digital mediums and the acceptance level is considerably higher than a lot of countries

across the globe. Hence, there will be a rapid movement towards 'on-demand' platforms which will allow doctors to access the information they want, at the time and frequency they want. That is when digital will truly play to its potential for the industry."

"We are seeing an unforeseen shift in the mind-set of our pharma colleagues and customers. There is a push amongst everyone to move towards digital platforms. For all of us digital is no longer the future, it is the now. The best part is the customers are really receptive at present when they are reached online," admits Kulwinder Singh, Chief Communication Officer at Cadila Pharma who spearheads digital initiatives. He adds, "The power of digital is immense and the current environment will require us to embrace this."

Thus, pharma marketers started experimenting with different avenues to engage prescribers and consumers and this trend, in turn, contributed to growing collaborations between telehealth platforms and the pharma sector.

A spokesperson from Merck Healthcare India points out, "Pharma companies have quickly transformed from being digitally naïve to aggressive users of digital channels to connect with HCPs, both through the field force as well as directly through various platforms. As per recent primary research done by a market research organisation, the rapid adoption of digital channels has been highlighted. For instance, the use of online platforms such as Lybrate, DocPlexus, Curofy and M3 have been instrumental in reaching out to super specialists, and that is a great transformation."

Jitesh Agarwal, Founder of Treelife, an advisory firm, also illuminates, "A conspicuous evolution in consumer behaviour has forced major pharma industries to explore the digital world. Consumers have reflected an inclination towards "on-demand" medical services. The reliance on online-consultations and delivery of medical drugs have witnessed a steep increase. A recent survey conducted by *Deloitte* has concluded that approximately 52 per cent of consumers resort to online media to explore and research on various health concerns, associated treatments as well as suitable healthcare institutions."

"Hence, pharma companies have adopted a unique approach to such an evolution. Instead of functioning independent to such platforms, many have opted to establish collaborations with them. By partnering with telemedicine platforms, the pharma industry will have a much wider and direct reach towards their target consumers (physicians or medical practitioners). This mitigates the damage and lack of sale and

promotions that were otherwise executed physically. The practitioners as well have a simplified media to stay abreast with the launch and effects of medical drugs,” he explains.

A shift towards tailored and targeted strategies

There seems to be a consensus in the pharma industry that it is time to move away from broad strokes to market drugs. Thus, not just the medium but the modes and methods of pharma marketing are also undergoing a change. The ‘one-size-fits-all approach’ is gradually seeing a decline and drug makers are looking to tap into critical insights about customers, prescribers with differentiated strategies.

Tyagi apprises, “COVID-19 has certainly changed priorities in the pharma industry and companies are conscious of the fact that in a post–COVID-19 world, pharma sales and marketing will be significantly altered and in many ways for the better! There will be well-balanced plans and initiatives for digital and face-to-face interactions depending on the need, content and doctor priorities for the same. The balance between digital and face-to-face interactions will be fundamentally driven by customer needs.”

Singh states, “One of the biggest shifts that we see is how we engage the customers moving forward. Marketing of products in pharma has mostly been science-based but with movement towards digital, the teams would now have to blend science with storytelling.”

The partnerships with telehealth and physician-only platforms also reflect how drugmakers are seeking new ways to examine behaviours to fine-tune their approaches and content to leverage more value in these complex environment.

Tyagi explains, “Digital mediums have emerged as promising avenues for information sharing, enhanced insights, interactions, awareness and solutions on healthcare. We are witnessing an increased level of adoption of telehealth opportunities supporting health information exchanges that further enable better engagement between HCPs and pharma companies.”

Dr Ruchir Mehra, CEO and Co-founder, Remedo updates, “Pharma companies realise that they need to transform the way they engage physicians. While physical MR model is not vanishing, now is the time to augment these visits and engage the doctors digitally as well by helping them enhance their practice. Platforms like Remedo have a ready solution and GTM plans for the pharma companies. They are able to customise

the product as per the individual pharma company's goals, therapeutic area, requirements and products. This gives them more control and the ability to launch differentiated exclusive products."

As physicians access the platform on a daily basis to manage their practice, teleconsult etc., it is possible for the pharma companies to customise the solution to provide relevant information to the physician through the platform. This includes resources like medical data about relevant therapy areas, articles, journals and brand information, he informs.

Dr Mukesh Parmar, CEO, Docplexus claims, "From a pure product focus, which was the case earlier, efforts are transitioning to an overall service or solution-based offering. Hence, marketers are now pushed to think disruptive and explore alliances, tech solutions that will augment the adoption of a product, improve brand recall and also allow patient outreach. In short, it's all about agility and seamless connectivity."

He informs, "Having rich data-backed insights into doctors' behaviours and mindset, meticulous medical content creation experience and digital marketing expertise, allow our industry partners to customise their content formats, campaigns and improve conversations around their target therapy areas and brands using data and our AI-based algorithms. Tapping into our existing huge KOL network enables them to create Advisory Boards for guidelines, brand equity building and R&D."

Ushering evidence-based marketing for measurable returns

A deepening understanding that relevant data and tools can result in a much higher return on investment for pharma companies is another reason for these mounting partnerships.

"The need to be at the point-of-care (which is shifting to online now) and the need to have more scalable, cost-effective, measurable (data-driven) and personalised means to improve brand adoption and business are the key drivers of these growing collaborations, spells out Parmar.

Stating that telehealth platforms can give an edge to pharma marketing efforts and make it more evidence-based, he says, "Given the governance on data protection, UCPMP and regulatory compliances for HCPs, most businesses are quickly adapting to more evidence-based online marketing (versus flagrant brand promotion, which worked better in offline methods for them) along with an emphasis on different

success parameters like the pirate metrics (AAARR – Awareness, Acquisition, Activation, Retention and Revenue) that will allow them to have ‘SMART’ goals and track returns.”

Interestingly, the move towards evidence-based marketing has also opened up the markets newer entrants like Doceree, a venture which connects pharma brands and digital platforms with the help of their AI solution and allows products and services of the former to be marketed to physicians on the latter.

Its CEO, Dr Harshit Jain elaborates on the role of endeavours like Doceree in pharma marketing and says, “We want to make physician marketing measurable. We aim to establish a linkage between digital performance metrics with business outcomes. Simply put, how many conversions pharma brands have been able to have through digital campaigns.”

Talking about how the ecosystem is expanding and the need for it, Dr Harshit Jain, CEO, Doceree expounds, “The entire ecosystem for physician marketing is scattered where pharmaceutical brands are acting independently with not much in-depth knowledge of digital – for them, it is merely a checkbox activity. For pharma players, to drive an effective behaviour change among doctors, a critical mass is important. At the same time, digital platforms are also operating as standalone entities in the absence of a unified platform, losing on monetisation opportunities available via network effect. Only the aggregation of digital platforms brought a revolutionary change in consumer marketing. Doceree on the same lines is building a similar unified ecosystem in physician marketing.”

Talking about the current situation, he notifies, “The benefits of contextual advertising/marketing is huge just for the reason that targeted platforms always provide better results. We are witnessing 3x click-through rates, 5x increase in the number of impressions and fruitful conversions for the pharma brands on professional physician networks.”

How will this trend evolve?

The collaborators of this trend, be it the pharma players, digital platforms or those who are working towards facilitating these partnerships, are buoyant about its growth.

For instance, Jain opines, “The pandemic provided the kick-start for the adoption of digital and partnerships with digital platforms. After having witnessed better business outcomes and return on investments, the wheel is likely to keep rolling.”

Tyagi articulates, “Telehealth has emerged to be an invaluable opportunity for pharma to capture newer opportunities that will allow them to identify interventions and practices that deliver improvements in health outcomes. This can be viewed as an opportunity to work with patients, hospitals and HCPs to form new partnerships and fundamental collaborations. By fostering an innovative, cohesive partnership, telehealth platforms can well be one of the most viable tools for pharma firms to build and enhance patient trust.”

Though more cautious, Singh also admits, “We are undergoing a rapid change which is also, in a lot of ways, undefined. But, the digital platforms are still evolving and will be used more vastly as the right policies and measures are developed around them.”

Even industry observers also seem to think that these collaborations are set to increase since there are several advantages to everyone involved. As Dheeraj Nair, Partner, J Sagar Associates, summarises, “There are several drivers for collaborations between pharma companies and telemedicine platforms. One, it is an additional business or product line for many pharma players. Two, by being able to get better information regarding end consumers (patients), pharma companies are able to grow their sales and marketing and adapt strategies accordingly. Three, collaborations between pharma companies and telemedicine platforms have the potential to improve outcomes for patients, especially, by tracking adherence to treatments, allowing timely interventions etc. Four, pharma companies would be able to strengthen their brand identity by providing “around the pill” or “beyond the pill” services. Five, there are tremendous opportunities for learning and innovation in drugs and medicine delivery systems on account of the ability to better understand markets, patient behaviour and performance of medication.”

Nevertheless, most pharma companies, as well as telehealth platforms, are wary of divulging the names of their partners in these collaborations. We think that the reluctance and the caginess are spurred by a deep-seated need to guard business intelligence. This indicates that there are likely to be several more developments in this sphere. Let’s wait and watch.

(PS: Express Pharma also garnered inputs some legal experts, business advisors and marketing veterans to examine and understand the laws and regulations that these partnerships will have to comply with. We will bring you their insights soon. Stay tuned!)

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