



# Trends in Pharma Marketing Research

September 2020



# Overview

## ▶ Research objectives, methodology & sample

Main results

- Budgets
- Decision making and influencing
- Content

Executive summary

# Research objectives & methodology

## Objectives

- To determine likelihood to invest in promotional and educational marketing channels and products, gauge marketing budgets and understand decision making factors in promotional and medical educational activities
- To evaluate the prevalence of websites, platforms and portals dedicated to providing HCPs with product-specific or disease-related content
- To gauge interest in content licensing

## Methodology

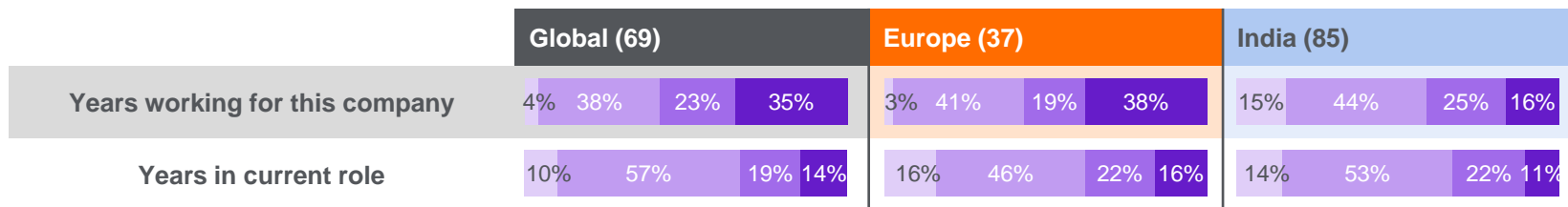
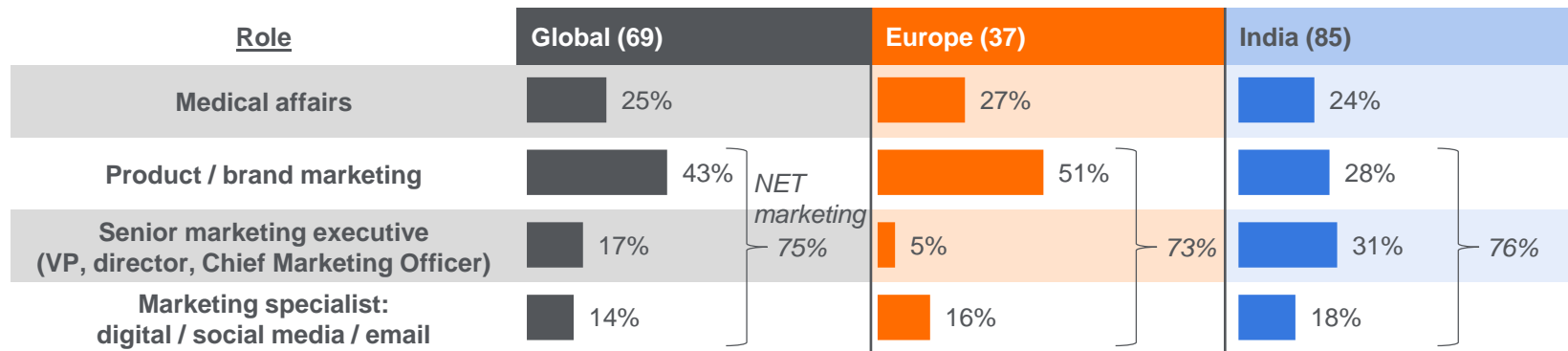
- A 10 minute online survey with **medical affairs, senior marketing roles, product and brand marketing roles and marketing specialists: digital / social media / email**
- The sample was comprised of members of contacts from internal email databases and external prospects from social media (LinkedIn) campaigns
- Participation was incentivised with:
  - \$3 charity donation to the WHO's Covid-19 Solidarity Response Fund, up to a total of \$1,000
  - Entry into a prize draw to win one of three \$100 vouchers (or equivalent value in local currency)
- Fieldwork was carried out between July and September 2020

## A total of 134 participants completed the research...

For the purposes of providing a balanced global view, the India data has been sub-sampled to give a global figure as follows:

GLOBAL 69	USA					
	10					
	Europe	UK	France	Germany	Spain	Poland
	37	3	13	3	17	1
APAC		Australia	India	<i>N=85 completed the survey in India and all completes are represented in the individual India market data</i>		
22		2	20			

# Sample demographics



Less than 1 year
  1-4 years
  5-10 years
  More than 10 years



Base: All participants (Global: 69, Europe: 37, India: 85)  
 Source: S02 - What is your current role in your company?  
 S03 - For how long have you been working for this company?  
 S04 - For how long have you been in your current role?

# Sample demographics

<u>Therapy areas covered</u>	Global (69)	Europe (37)	India (85)
Non-specialty-specific	9%	11%	8%
Cardiology and Vascular Medicine	23%	22%	20%
Internal Medicine	17%	11%	12%
Endocrine, Metabolic & Genetic disorders	16%	11%	22%
Anaesthesiology	13%	16%	9%
Accident & Emergency Medicine	12%	3%	19%
Allergy & Clinical Immunology	12%	8%	15%
Paediatrics	12%	5%	14%
Respiratory Medicine	12%	8%	16%
Dermatology	10%	14%	25%
Immunology & Inflammation	10%	11%	16%



Base: All participants (Global: 69, Europe: 37, India: 85)  
Source: S05 - What therapy area(s) do you cover?

*Top ten specialties displayed, see notes for others*

# Sample demographics

<u>Regions responsible for</u>	Global (69)	Europe (37)	India (85)
Europe	49%	81%	12%
Asia	38%	19%	84%
North America	25%	16%	13%
Middle East	13%	16%	11%
South America	13%	16%	7%
Eastern Europe	12%	16%	5%
Oceania	12%	14%	5%
Central America	10%	14%	2%
Africa	10%	14%	5%
I am not responsible for any markets	13%	16%	11%

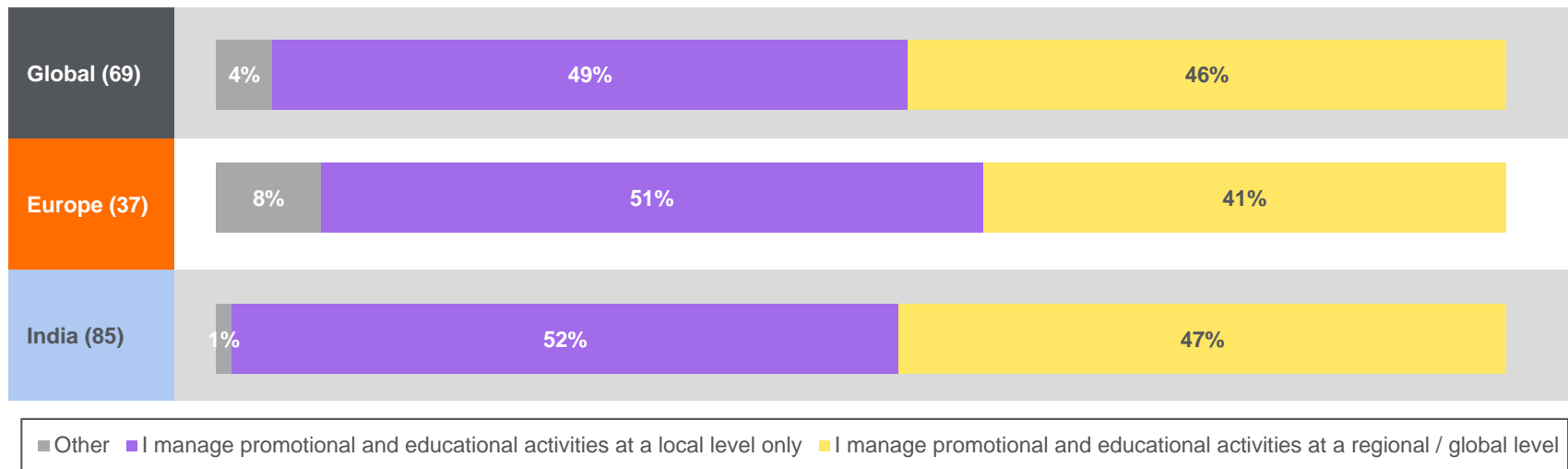


Base: All participants (Global: 69, Europe: 37, India: 85)  
S06 – Which regions or countries are you responsible for in your current role?

# There is an even split between participants who manage promotional and educational activities locally and those who do so at a regional or global level

- There is a slight skew towards professionals responsible for local activities only, however

## Do you have responsibility for promotional and educational activities on a local or regional / global level?



Other responsibilities mentioned include "training for France" (FR: "formation pour la France"), "Assisted in training and promoted some activities" (ES: "Ayudó en la formación y promocionó algunas actividades"), and "Regional Level As Well As Within Zonal Perspectives"



Source: Q12 – Please indicate if you have responsibility for promotional and educational activities on a local or regional / global level?  
Base: All participants (Global: 69, Europe: 37, India: 85)



# Overview

Research objectives, methodology & sample

Main results

- ▶ • **Investments / Budgets**
- Decision making and influencing
- Content

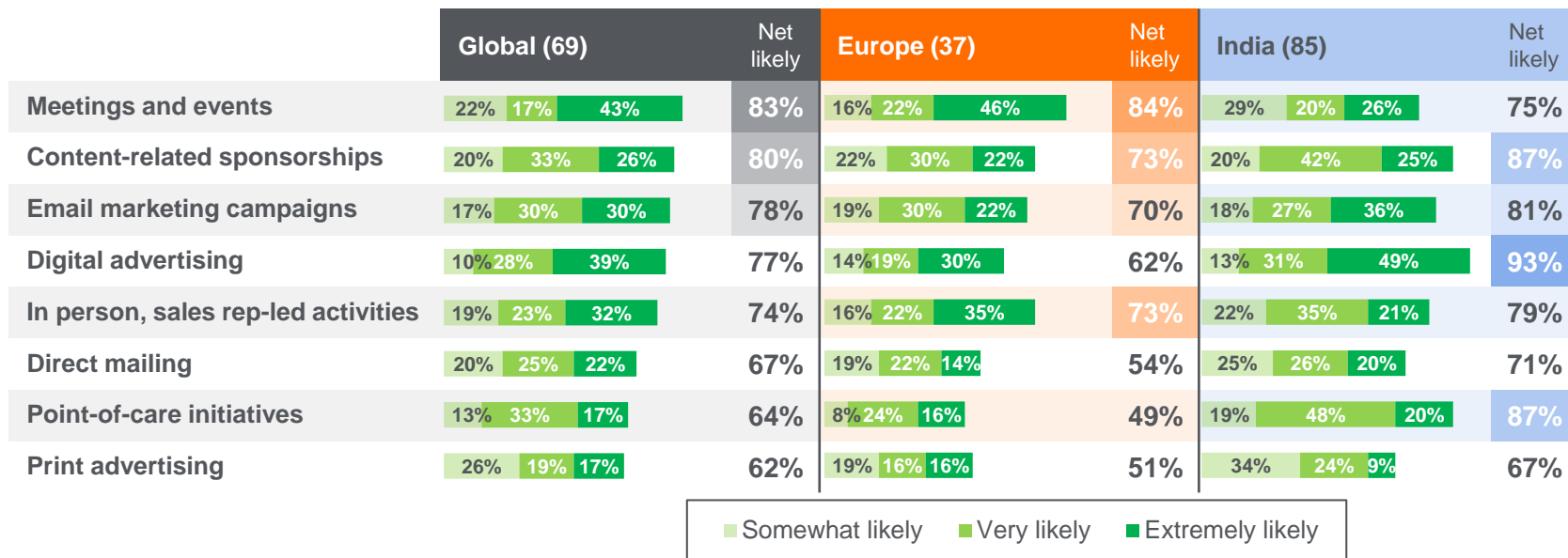
Executive summary

## Promotional marketing channels

Globally, in 2020-2021, meetings and events are most likely to be invested in, followed by content-related sponsorships and email marketing campaigns

- In Europe, in person and sales rep-led activities are among the most likely channels to be invested in
- In India, digital advertising is the number one investment channel
- Print advertising is the least likely channel to be invested in

### How likely are you to invest in 2020-2021 in the following promotional marketing channels?






































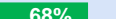


























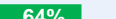









Source: Q1 - How likely are you to invest in 2020-2021 in the following promotional marketing channels?  
Base: All participants (Global: 69, Europe: 37, India: 85)  
(5 point scale: Not at all likely, Not so likely, Somewhat likely, Very likely, Extremely likely)

## Promotional marketing channels

On a global level, most activities' budget is more likely to increase than decrease in the next 3-4 years, notably for digital advertising and email marketing campaigns. Print advertising is most likely to decrease

- Digital advertising and email marketing campaigns are especially likely to have increased budgets in the next few years
- In India, the likelihood of budgets for all activities increasing is higher than globally and in Europe

### Are you planning to increase or decrease your promotional marketing budget for the following activities in the next 3-4 years?

	Global (69)			Europe (37)			India (85)		
	Decrease	Same	Increase	Decrease	Same	Increase	Decrease	Same	Increase
Digital advertising	6% 	7% 	77% 	5% 	14% 	62% 	1% 	4% 	94% 
Email marketing campaigns	9% 	12% 	71% 	8% 	16% 	59% 	8% 	14% 	75% 
Direct mailing	10% 	25% 	49% 	14% 	27% 	32% 	13% 	25% 	54% 
Content-related sponsorships	19% 	23% 	45% 	16% 	27% 	35% 	7% 	20% 	68% 
Meetings and events	30% 	20% 	41% 	24% 	24% 	35% 	35% 	13% 	51% 
In person, sales rep-led activities	26% 	30% 	33% 	19% 	38% 	24% 	24% 	28% 	46% 
Point-of-care initiatives	16% 	30% 	33% 	11% 	41% 	16% 	9% 	25% 	64% 
Print advertising	36% 	28% 	26% 	30% 	32% 	22% 	41% 	28% 	29% 



Source: Q2 - Please indicate whether you are planning to increase or decrease your promotional marketing budget for the following activities in the next 3-4 years.  
Base: All participants (Global: 69, Europe: 37, India: 85)

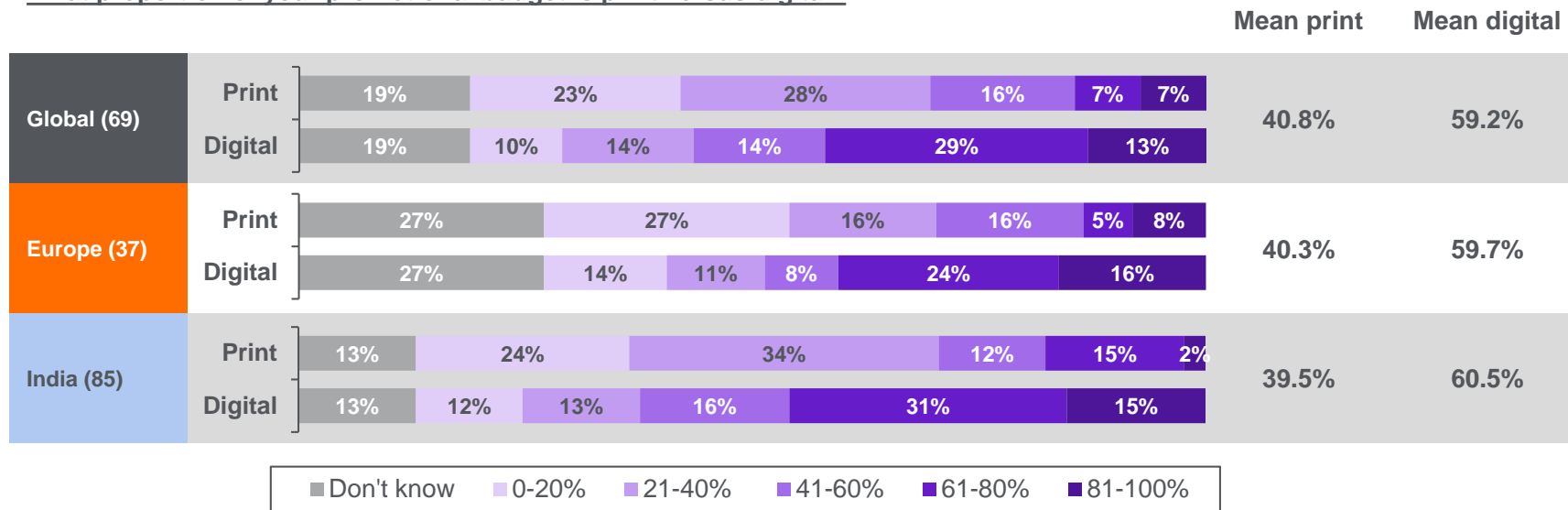
See notes for 'don't know' figures

## Promotional marketing channels

### Higher budgets are being dedicated to digital promotional channels globally, as well as in Europe and India

- Average proportion of the budget spent on print promotions is around 40%, while the average for digital promotions is 60%
- In two-fifths of organisations, at least 60% of the promotional budget is used on digital resources
- A quarter of organisations spend 20% or less of their budget on print promotional campaigns

#### What proportion of your promotional budget is print versus digital?



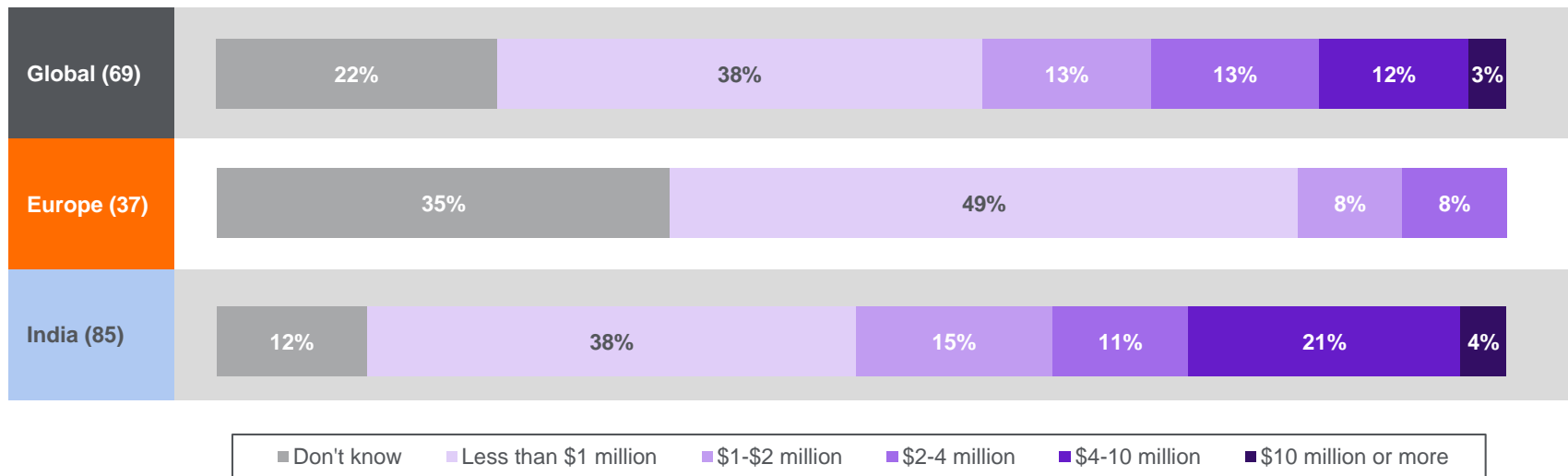
Source: Q3 - What proportion of your promotional budget is print versus digital?  
Base: All participants (Global: 69, Europe: 37, India: 85)

## Promotional marketing channels

### Half of respondents oversee annual promotional marketing budgets under \$1 million

- In Europe, those who know their annual promotional budget, estimate it to be under \$4 million
- While many organisations in India have promotional budgets under \$1 million, one out in five spend between \$4 and \$10 million per year

#### What is the approximate size of your annual promotional marketing budget?



Source: Q4 - What is the approximate size of your annual promotional marketing budget?  
Base: All participants (Global: 69, Europe: 37, India: 85)

*2 participants in India responded "Other": \$100 and \$0.3 million, and have been back-coded as "less than \$1 million"*

## Medical educational products

Globally, in 2020-2021, webcasts are most likely to be invested in, followed by education platforms, proceedings of scientific sessions, CMEs and round table video

- CMEs comes at the top in India, with 94% of respondents likely to invest in this educational activity in 2020/2021
- Higher likelihood to invest in India vs. Europe

### How likely are you to invest in 2020-2021 in the following medical educational products?

	Global (69)			Net likely	Europe (37)			Net likely	India (85)			Net likely
Webcasts of scientific sessions/meetings/conferences	22%	28%	36%	86%	24%	22%	35%	81%	16%	33%	42%	92%
Education platforms (e.g. resource centres)	17%	28%	36%	81%	27%	32%	22%	81%	19%	32%	39%	89%
Proceedings of scientific sessions/meetings/conferences	30%	29%	16%	75%	30%	27%	11%	68%	28%	34%	29%	92%
Continuous medical education (CMEs)	14%	30%	29%	74%	11%	19%	32%	62%	25%	40%	29%	94%
Round table video / podcasts	22%	32%	20%	74%	32%	32%	14%	78%	15%	33%	29%	78%
Conference coverage	23%	28%	20%	71%	32%	19%	16%	68%	25%	32%	22%	79%
Anatomical images, 3D renderings or videos	19%	26%	13%	58%	22%	24%	3%	49%	28%	31%	26%	85%
Article service	19%	20%	16%	55%	14%	14%	3%	35%	24%	32%	28%	84%
Reprints	19%	22%	13%	54%	22%	14%	14%	49%	35%	18%	12%	65%
Supplements	19%	16%	14%	49%	11%	11%		27%	34%	28%	19%	81%
Medical textbook sponsorship	13%	20%	10%	43%	11%			19%	38%	22%	20%	80%

■ Somewhat likely ■ Very likely ■ Extremely likely



Base: All participants (Global: 69, Europe: 37, India: 85)

Source: Q6 - How likely are you to invest in 2020-2021 in the following medical educational products?

(5 point scale: Not at all likely, Not so likely, Somewhat likely, Very likely, Extremely likely)

## Medical educational products

### Over a half of institutions are planning to increase budget for webcasts of scientific sessions, education platforms, CMEs and round table videos and podcasts

- Three quarters in India are going to be investing more into webcasts of scientific sessions

#### Are you planning to increase or decrease your medical educational budget for the following activities in the next 3-4 years?

	Global (69)			Europe (37)			India (85)		
	Decrease	Same	Increase	Decrease	Same	Increase	Decrease	Same	Increase
Webcasts of scientific sessions	10%	14%	65%	5%	22%	57%	9%	11%	79%
Education platforms	9%	22%	57%	5%	30%	46%	11%	12%	76%
Continuous medical education (CMEs)	10%	23%	55%	5%	32%	43%	13%	20%	67%
Round table video / podcasts	17%	16%	54%	5%	24%	51%	19%	16%	60%
Proceedings of scientific sessions	13%	32%	43%	14%	41%	30%	12%	18%	68%
Anatomical images, 3D renderings / videos	10%	41%	35%	8%	43%	24%	9%	22%	61%
Article service	16%	33%	33%	16%	38%	19%	15%	24%	59%
Conference coverage	29%	25%	30%	19%	38%	19%	24%	15%	58%
Supplements	19%	36%	28%	16%	43%	14%	18%	29%	46%
Medical textbook sponsorship	17%	45%	23%	24%	46%	8%	21%	26%	52%
Reprints	26%	42%	20%	22%	51%	8%	26%	35%	38%



Source: Q7 - Using the scale below, please indicate whether you are planning to increase or decrease your medical educational budget for the following activities in the next 3-4 years?

Base: All participants (Global: 69, Europe: 37, India: 85)

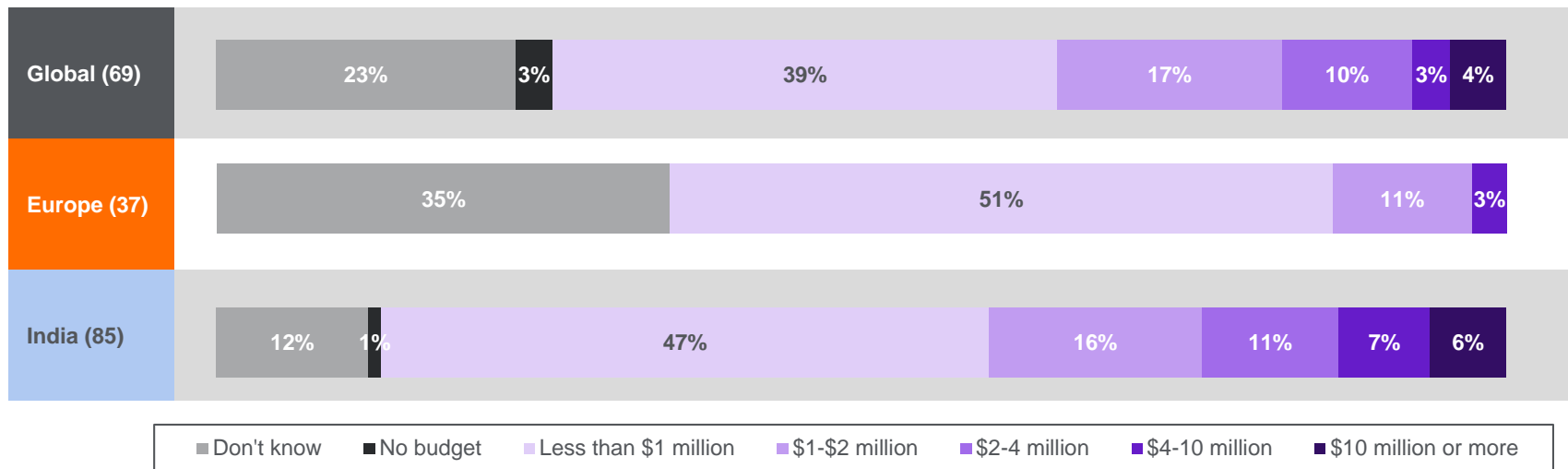
See notes for 'don't know' figures

## Medical educational products

### The majority of organisations spend less than \$2 million on education annually

- Indian organisations tend to have higher education budgets than organisations in Europe
- In half of the cases, less than \$1 million per year is spent on education in Europe

#### What is the approximate size of your annual education budget?



Source: Q9 - What is the approximate size of your annual education budget?  
Base: All participants (Global: 69, Europe: 37, India: 85)

*"No budget" code added from "Other" responses*

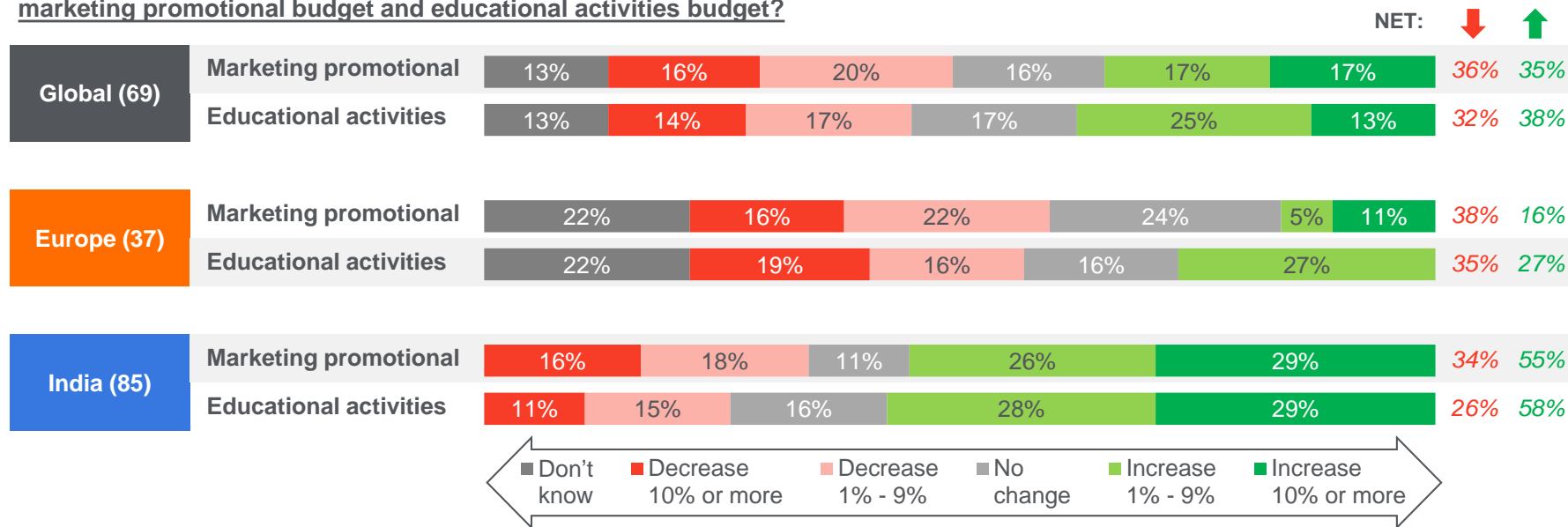
*1 participant from India has answered \$100 at "Other" and has been back-coded as "less than \$1 million"*



# On a global level, budget forecast for marketing promotional and educational activities is quite mixed: increases are more likely in India but less likely in Europe

- Over half in India expect their budget will increase in 2020-2021
- In Europe, a higher proportion (around a third) expect their budget will decrease compared with the proportion who expect their budget to increase (between 1 in 6 and 1 in 4)

## How do you expect the Covid-19 pandemic to influence your 2020-2021 marketing promotional budget and educational activities budget?



Base: All participants (Global: 69, Europe: 37, India: 85)

Source: Q19 - Using the scale below, please indicate how you expect the Covid-19 pandemic to influence your 2020-2021 marketing promotional budget and educational activities budget?

# Overview

Research objectives, methodology & sample

Main results

- Investments / Budgets



- **Decision making and influencing**

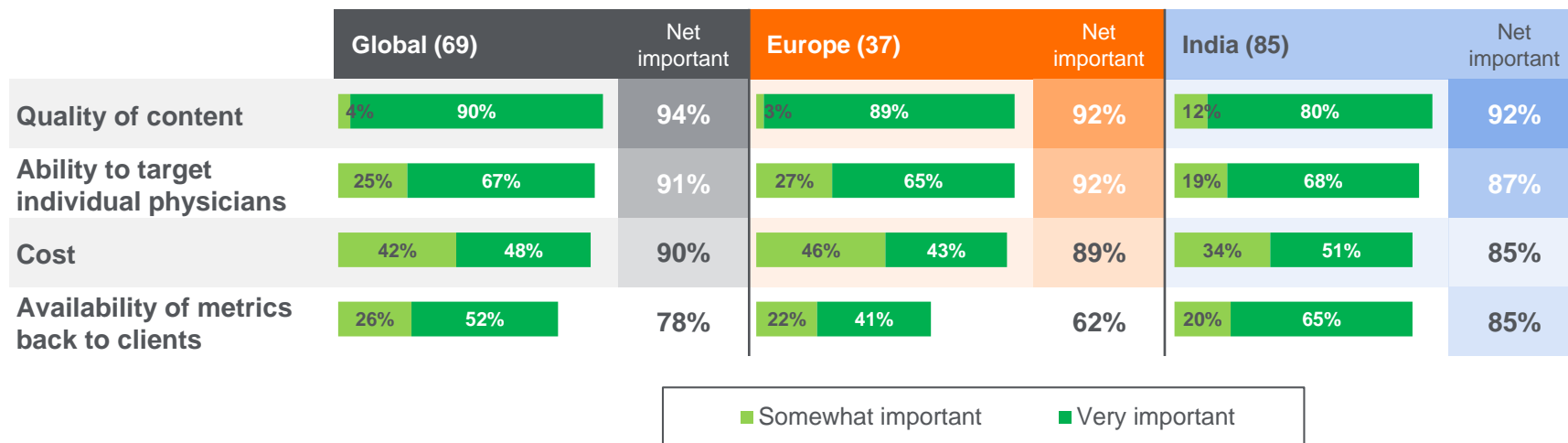
- Content

Executive summary

# The quality of the content is the most important factor when it comes to making decisions about promotional activities

- The ability to target individual physicians and cost are also of high importance
- Consistent findings across regions

## How important are the following factors in your decision-making process about promotional activities?



Other important factors include: discounted price, customer service, easy of accessibility, simplicity, audience, age group, customer satisfaction, sponsorships, omni channel presence, the kinds of activity customers are engaged in, implementation of the promotional strategy as per plan



Base: All participants (Global: 69, Europe: 37, India: 85)

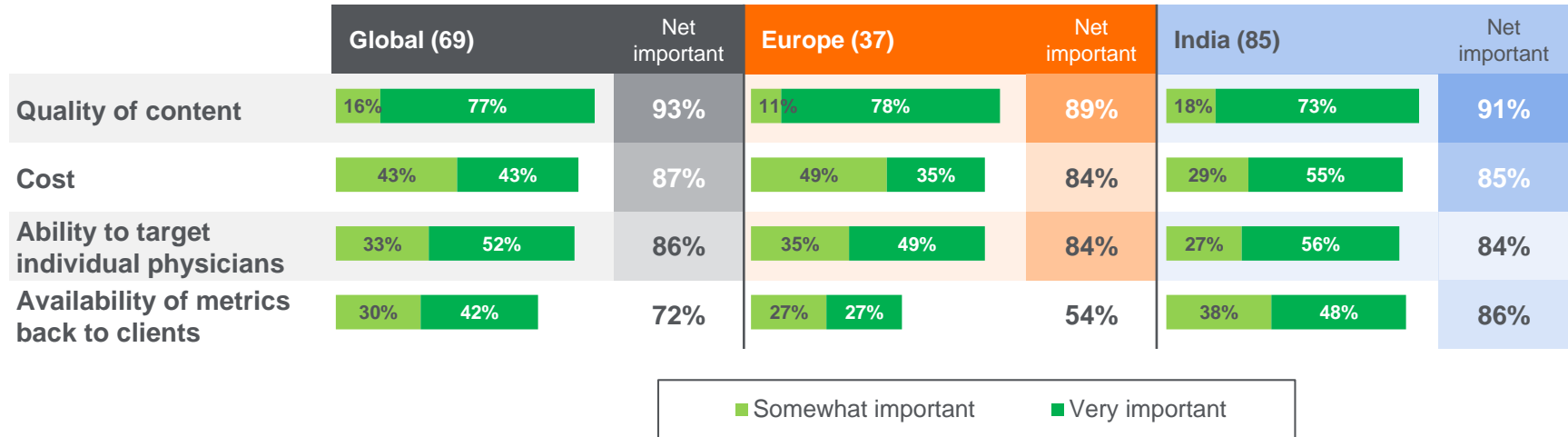
Source: Q5 - How important are the following factors in your decision-making process about promotional activities?

(5 point scale: Not at all important, Somewhat unimportant, Neither unimportant nor important, Somewhat important, Very important)

# Similarly, the quality of the content is the most important factor when it comes to making decisions about educational activities

- The ability to target individual physicians and cost are also of high importance
- Consistent findings across regions

## How important are the following factors in your decision-making process about educational activities?



Other important factors include: customer service, motive, simplicity, customer satisfaction, and implementation of the educational strategy as per plan



Base: All participants (Global: 69, Europe: 37, India: 85)

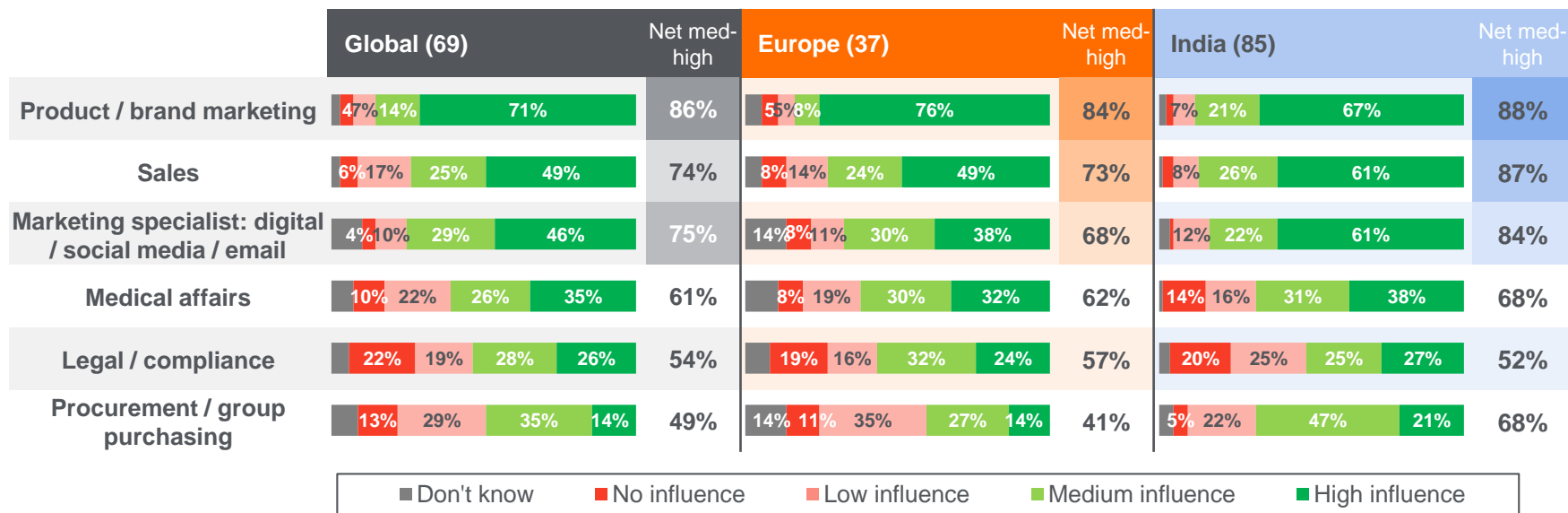
Source: Q10 - How important are the following factors in your decision-making process about educational activities?

(5 point scale: Not at all important, Somewhat unimportant, Neither unimportant nor important, Somewhat important, Very important)

# Product / brand marketing roles are most influential for budget-related decisions for promotional activities on a regional / local level

- Sales roles and marketing specialists are also fairly influential
- Procurement and legal/compliance are the least influential departments

## Level of influence departments have in budget-related decisions for promotional activities on a regional / local level

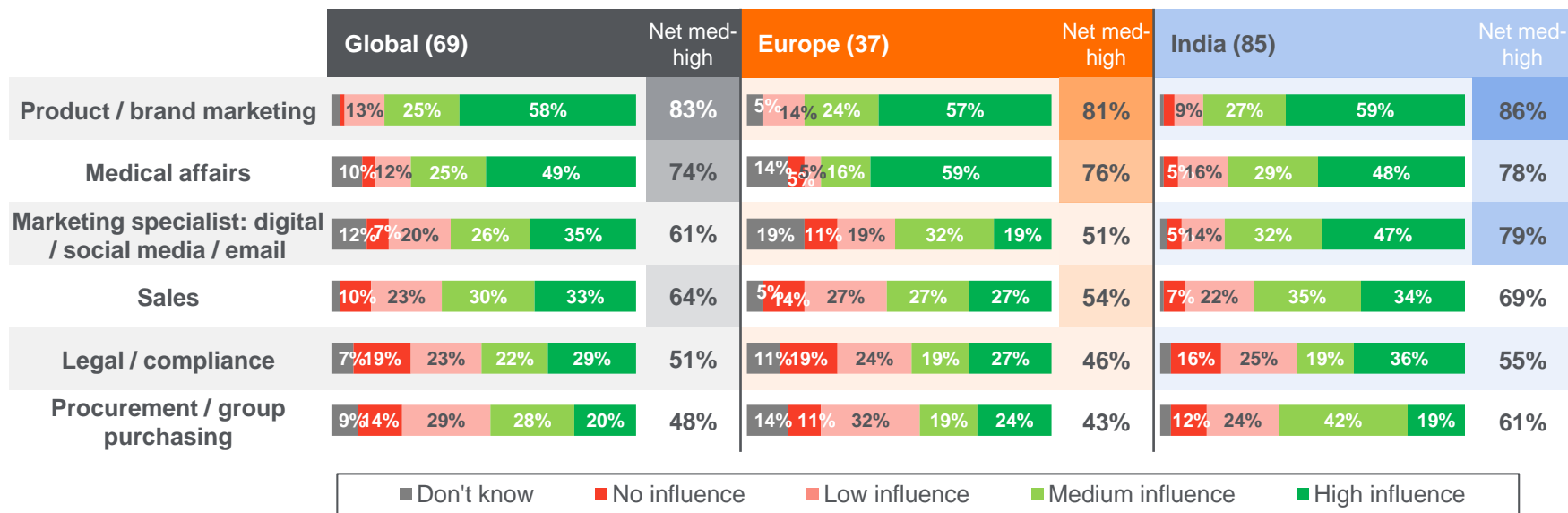


Base: All participants (Global: 69, Europe: 37, India: 85)  
 Source: Q11a - Please indicate the level of influence that the following departments have in budget-related decisions for promotional activities on a regional / local level...? (4 point scale: No influence, Low influence, Medium influence, High influence)

# A similar picture for educational activities - product / brand marketing roles are most influential for budget-related decisions on a regional / local level

- Medical affairs, marketing specialists and sales roles and are also fairly influential
- Procurement and legal/compliance are the least influential departments

## Level of influence departments have in budget-related decisions for educational activities on a regional / local level



Base: All participants (Global: 69, Europe: 37, India: 85)  
Source: Q11b - Please indicate the level of influence that the following departments have in budget-related decisions for educational activities on a regional / local level ...? (4 point scale: No influence, Low influence, Medium influence, High influence)

# Overview

Research objectives, methodology & sample

Main results

- Investments / Budgets
- Decision making and influencing

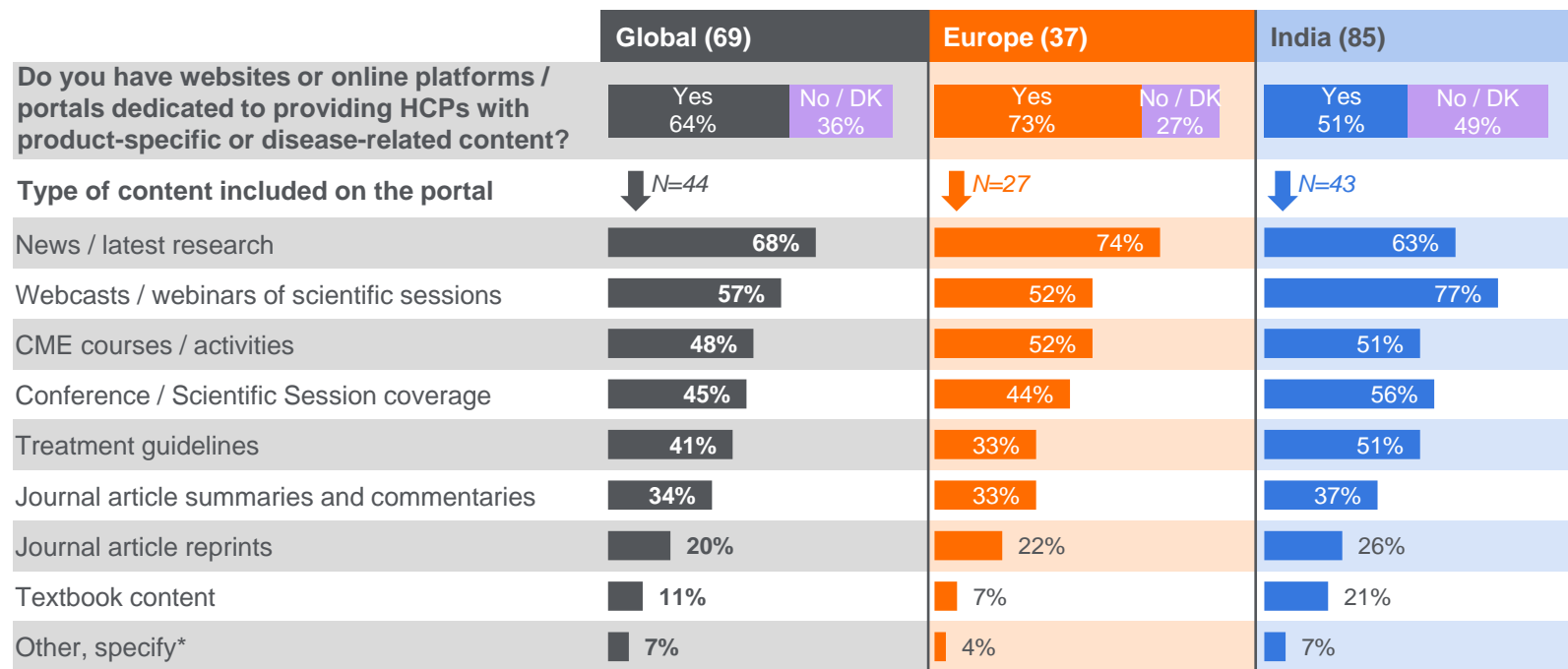


• **Content**

Executive summary

# Around two thirds have websites or online portals that provide product-specific or disease-related content (slightly more in Europe and fewer in India)

- The portals mainly feature news and latest research
- They also feature webcasts and webinars, CME courses and treatment guidelines in at least two-fifths of cases



Base: Participants with websites / online platforms (Global: 44, Europe: 27, India: 43)  
Source: Q13 – Do you have websites or online platforms / portals dedicated to providing healthcare professionals with product-specific or disease-related content? Q14 - What type of content do you include on the portal?

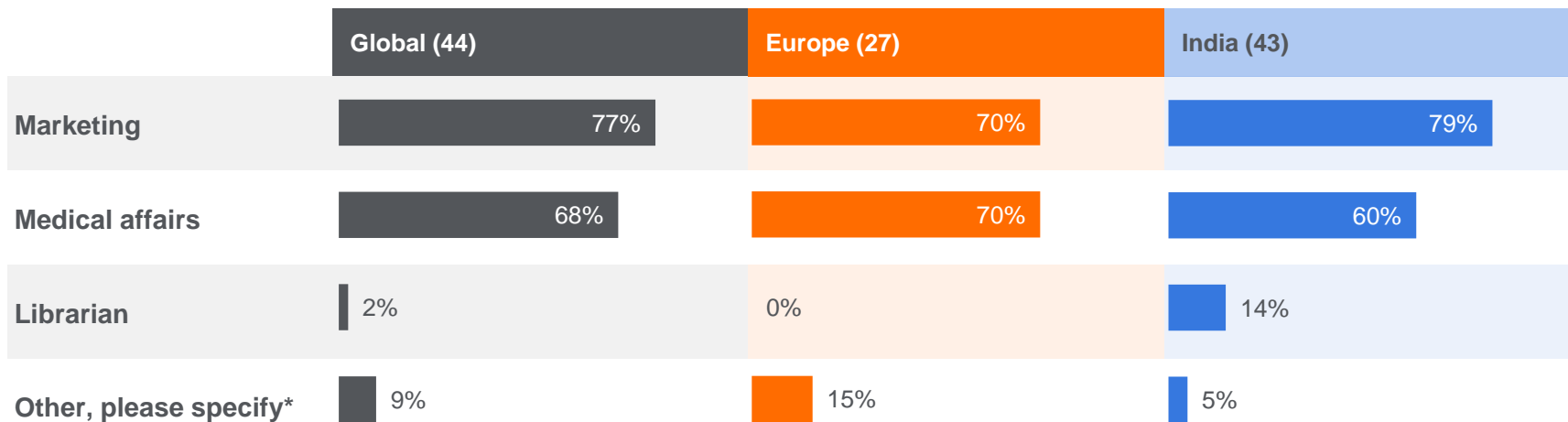
\*Others include: Newsletters, PI/SmPC, product related articles and therapies, product details, and evolving content



# Marketing or medical affairs are the most likely departments to manage and select content for corporate website or online platforms

- In Europe, marketing and medical affairs are equally often responsible for web content management and selection
- In India, marketing departments have web content management among their responsibilities more often than medical affairs

## Who manages and selects content for your website or online platform?



*\*Others include: Communications, Training, third-party partners, Portfolio management, and Design and communications*

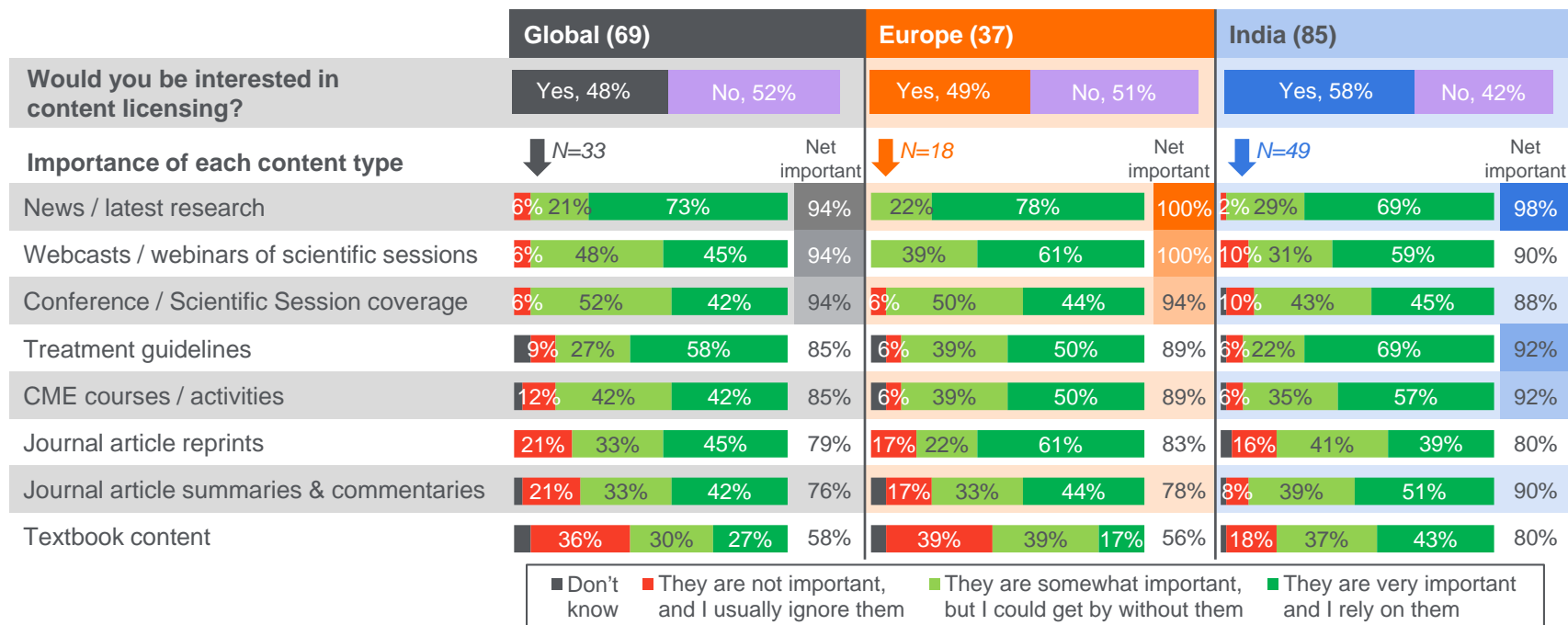


Base: Participants with websites / online platforms (Global: 44, Europe: 27, India: 43)

Source: Q15 - How important are the following factors in your decision-making process about educational activities?

# Around half are interested in content licensing; news and the latest research, webcasts / webinars and conferences / Scientific Session coverage are of particular importance

- Textbook content is the least important content type with around a third usually ignoring this



Base: All participants (Global: 69, Europe: 37, India: 85). Source: Q16 – Would you be interested in content licensing?  
 Base: Participants interested in content licensing (Global: 33, Europe: 18, India: 49)  
 Source: Q17 - For each of the content types listed below, please indicate the importance of each to your organisation...

*Other important content types include:  
 Meeting with top level educators,  
 workshops and patents filed*

# Overview

Research objectives, methodology & sample

Main results

- Investments / Budgets
- Decision making and influencing
- Content



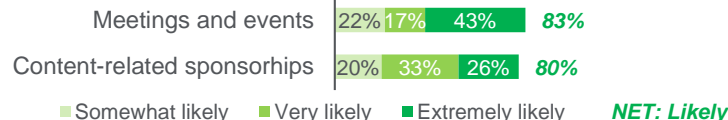
**Executive summary**

# Executive Summary

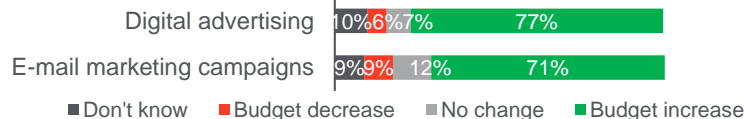
## Promotional activities

In 2020-2021, overall likelihood to invest in promotional marketing channels and medical educational products is high (but Covid-19 is expected to have a mixed impact on budgets)...

Organisations are most likely to invest in meeting and events, and content-related sponsorships for promotion in 2020-2021

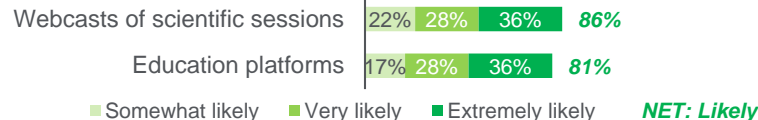


However, there is likely to be a high investment increase into digital advertising and email marketing campaigns in the next 3-4 years

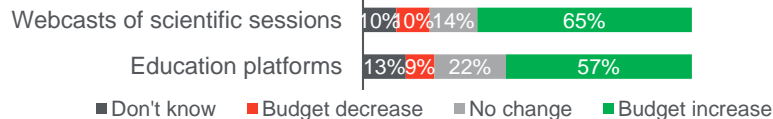


## Educational activities

Among education channels, webcasts of scientific sessions and education platforms are most likely to get funding in 2020-2021

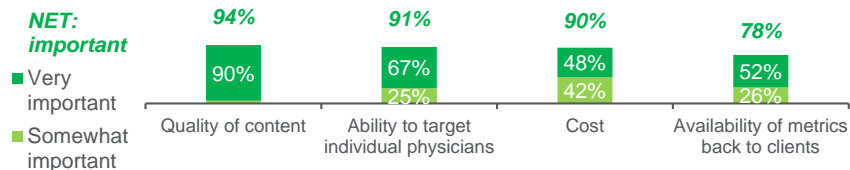


Over the next 3-4 years, scientific session webcasts and education platforms are also the most likely to have budget increases

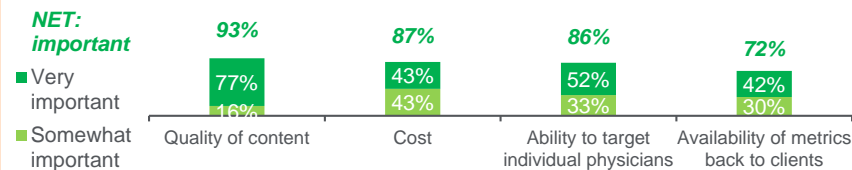


Product/brand marketing, sales, medical affairs and marketing are the teams most influential in budget-related decision making...

Quality of content is the main factor when choosing a promotional channel



When choosing educational activities, quality of content is the main factor



At least half have websites or online platforms / portals dedicated to providing HCPs with product-specific or disease-related content, typically news and the latest research and webinars of scientific sessions; this is managed by marketing and medical affairs. Around half are interested in content licensing.