



The Indian Pharma Industry

Project 1 Interaction Design

By:
Hemruchi
07633803
Interaction Design

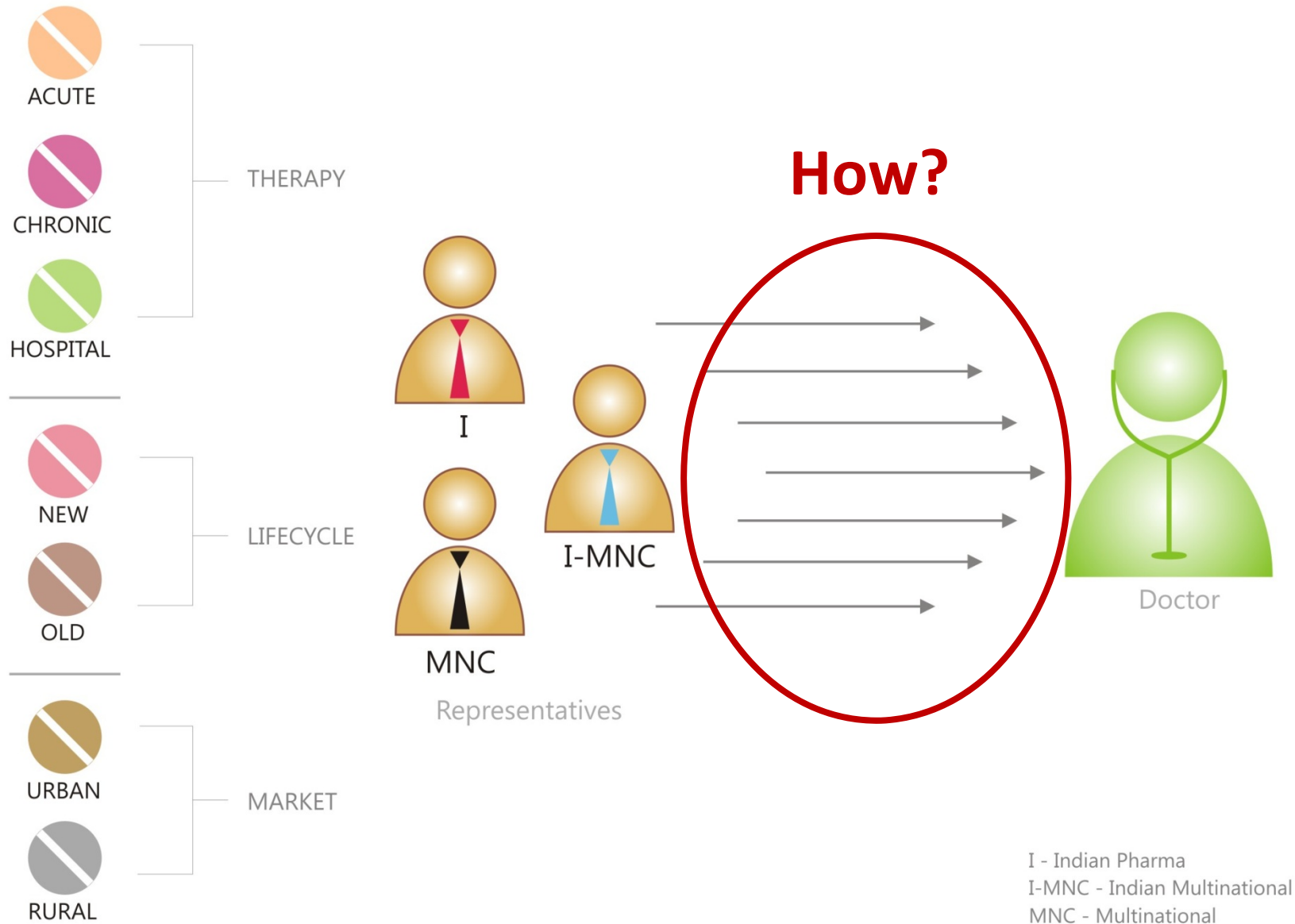
IDC
IIT Bombay, 2008

Contents

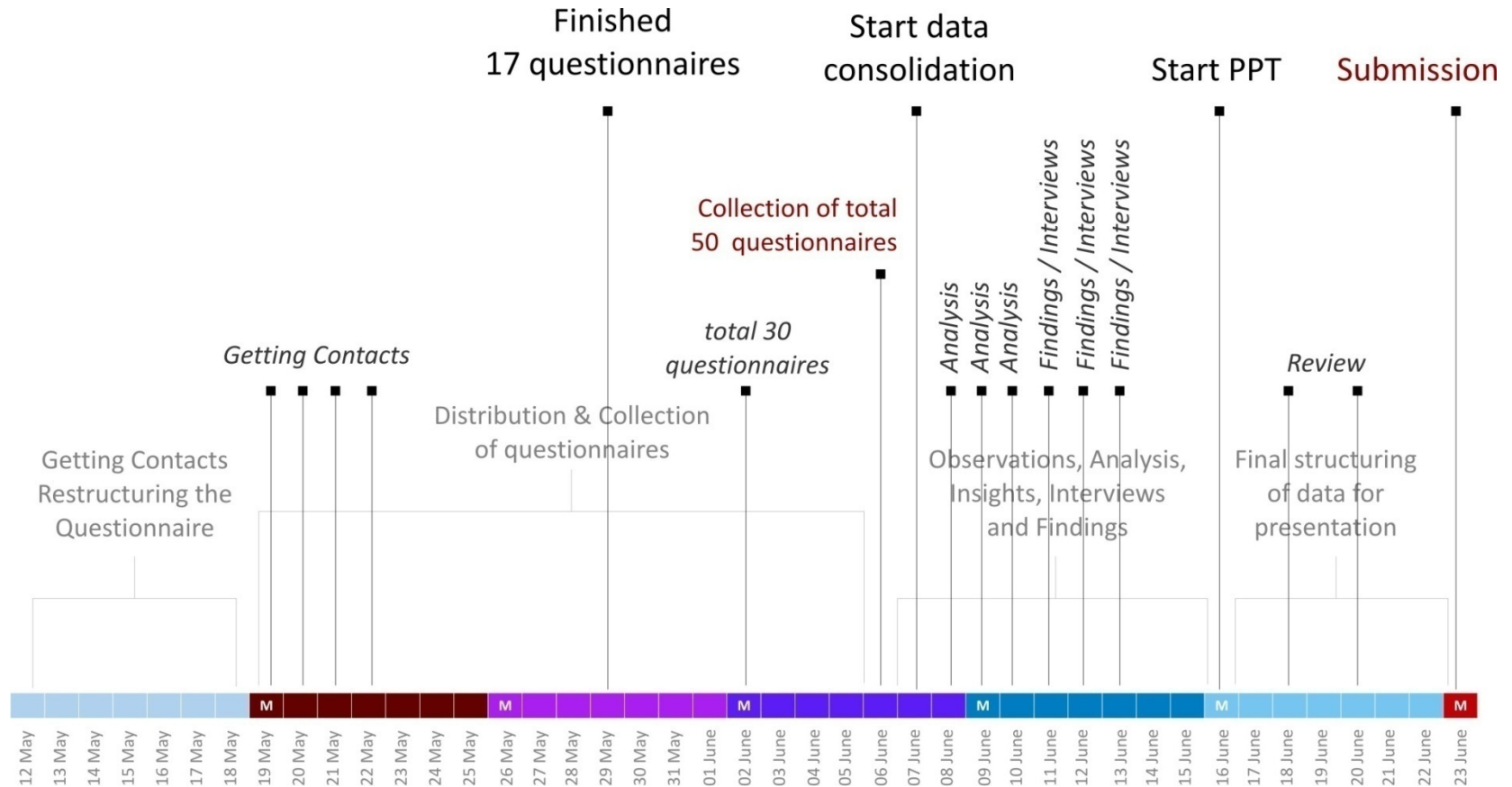
- INTRODUCTION
- PROJECT TIMELINE
- DATA COLLECTION
- INTERVIEWS
- ANALYSIS
- DESIGN OPPORTUNITIES
- LEARNINGS
- ACKNOWLEDGEMENTS

Introduction

- India is a 'branded generic' pharma market. A given molecule is available at various price points and marketed under different brand names.
- Hence it becomes necessary to analyse brand positioning strategies adopted and challenges faced by marketing and sales people across the industry.
- Making observation on the Indian Pharma-Market Dynamics by mapping marketing strategies for application or facing challenges.
- Find Design opportunities to facilitate effective communication.



Project Timeline



Data Collection

- The Pharma Industry – ORG | ims
 - Distribution of market and products
 - Top 10 companies
 - Top 10 product

Top 10 Companies

Company	<u>% Mrkt</u>
1 CIPLA	5.4
2 GLAXOSMITHKLINE	4.36
3 NICHOLAS PIRAMAL	3.52
4 SUN PHARMA	3.35
5 ALKEM	2.56
6 LUPIN LABS	2.72
7 ZYDUS CADILA	2.4
8 RANBAXY	2.38
9 DR REDDYS LABS	2.39
10 ABBOTT	2.29

Top 10 Products

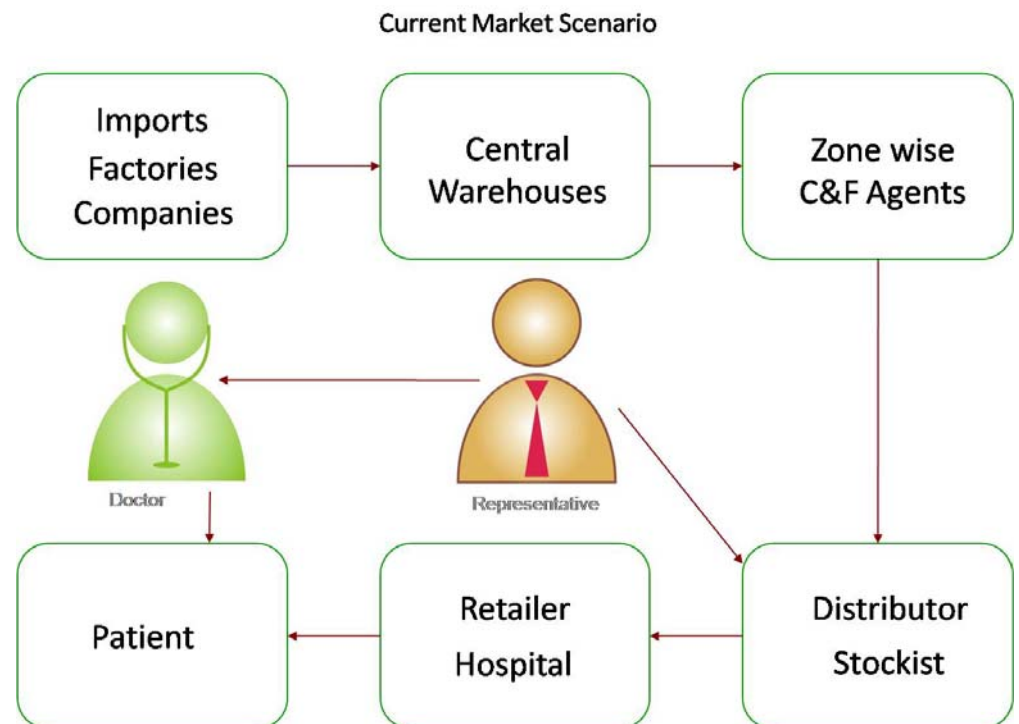
Product	Company
1 COREX	Pfizer
2 VOVERAN	Novartis
3 HUMAN MIXTARD 30/70	Abbott
4 Liv – 52	Himalaya Drug
5 TAXIM	<u>Alkem</u>
6 PHENSEDYL COUGH	Nicholas <u>Piramal</u>
7 AUGMENTIN	GSK
8 BECOUSULES	Pfizer
9 ZIFI	FDC
10 DEXORANGE	Franco Indian

Data Collection

- The Stakeholders

Visiting various companies and distribution units to know how they function.

Interviews to know their idea of the branded generic market & practices adopted.



Data Collection

- Companies Visited



Interviews and Analysis

- A questionnaire was developed to gather information from various people in the pharma industry.

Section 1: Preliminary Information

To identify the experience of individual over a period and across companies.

To know the area of experience.

- A screener helped us focus on the data collection.
 - Brand Manager / Marketing Manager / Sales Manager in a Pharma company
 - He / she must be about below 40 years of age.
 - 10 – 15 years experience.
- The questionnaire was divided into 3 sections.

Preliminary Information:

Name:	
Age:	
Designation:	

COMPANY	YRS OF EXPERIENCE	TYPE OF JOBS DONE	YRS OF EXPERIENCE
Indian Pharma		Pharma Sales	
Multinational Pharma		Pharma Marketing	
Indian Multinational Pharma		Effectiveness / Training	

put an 'x' in the corresponding box

CURRENT ZONE	
North	
South	
East	
West	

CITIES YOU HAVE WORKED IN

State where you have experience: put an 'x' in the corresponding box

PRODUCT TYPE	PRODUCT LIFECYCLE	MARKET
Acute Therapy	New	Urban
Chronic Therapy	Old	Rural
Hospital / ICU / CCU		

Section 2: What Matters...

To know how important a tool is across product types, product lifecycles and markets.

Each tool was rated
on a scale of 1 to 5 where 1 matters
most and 5 matters least.

What Matters...

Please rate the following tools on a scale of 1 to 5 where 1 = **Matters Maximum** and 5 = **Matters Least**

MARKETING TOOL	PRODUCT TYPE			PRODUCT LIFECYCLE		MARKET	
	ACUTE THERAPY	CHRONIC THERAPY	HOSPITAL/ICU/ICCU	OLD	NEW	URBAN	RURAL
Span of Coverage of doctors							
Frequency of visits to doctors							
Relationship with doctors							
Concept Selling by Representatives							
Focus on Top Prescribers							
Doctor Round Table meetings							
Conferences / Symposia							
International Sponsorships of doctors							
Endorsements by Key Opinion Leader doctors							
Branded Give away to doctors (Gifts)							
Clinical Study Leverage for doctors							
Patient Education							
Direct to patient Campaigns							
Patient Meetings / Disease Management							
Hospital Pharmacy Focus							
Newsletters to doctors							
Newsletters to patients							
e-Detailing / Web based Promotion							
Media Campaigns							
Building on Company's Brand Equity							
Brand Registry / PMS Leverage							
Focus on Channel Promotion							
Management of Distribution Channels							

would you like to say anything in addition to this list:

Section 3: About Branding

To know how brand positioning is carried out.

- Frequency of Marketing Review
- Brand Segment Ratio
- Brand Positioning per Segment
- Frequency in change of positioning
- Brand Positioning

ABOUT BRANDING

Please select one option for the following questions: put an 'x' in the corresponding box

1. How often is a marketing mix of a brand reviewed?

<input type="checkbox"/>	Monthly
<input type="checkbox"/>	Quarterly
<input type="checkbox"/>	Half yearly
<input type="checkbox"/>	Annually
<input type="checkbox"/>	Need based

Please give reasons for your choice:

2. How many segments a brand can focus on at a time?

<input type="checkbox"/>	One segment only
<input type="checkbox"/>	Maximum 2 segments
<input type="checkbox"/>	Maximum 3 segments
<input type="checkbox"/>	More than 3 segments

Please give reasons for your choice:

3. In case of more than one segment, how is Brand Positioning executed?

<input type="checkbox"/>	Single positioning for all segments
<input type="checkbox"/>	Different positioning for different segments
<input type="checkbox"/>	Other than core segment, no specific positioning

Please give reasons for your choice:

4. How often are brands repositioned?

<input type="checkbox"/>	At growth stagnancy
<input type="checkbox"/>	When segment focus is shifted
<input type="checkbox"/>	When target specialist is changed
<input type="checkbox"/>	Due to launch of line extension
<input type="checkbox"/>	When a new brand is launched in same / similar category

Please give reasons for your choice:

5. Brands are often positioned based on...

<input type="checkbox"/>	Brands intrinsic key feature
<input type="checkbox"/>	Benefit sought by a particular (key target) specialist
<input type="checkbox"/>	Overall benefit relevant to specialists
<input type="checkbox"/>	Overall benefit relevant to total target customers
<input type="checkbox"/>	Outcome expected by the patients of the focus segment

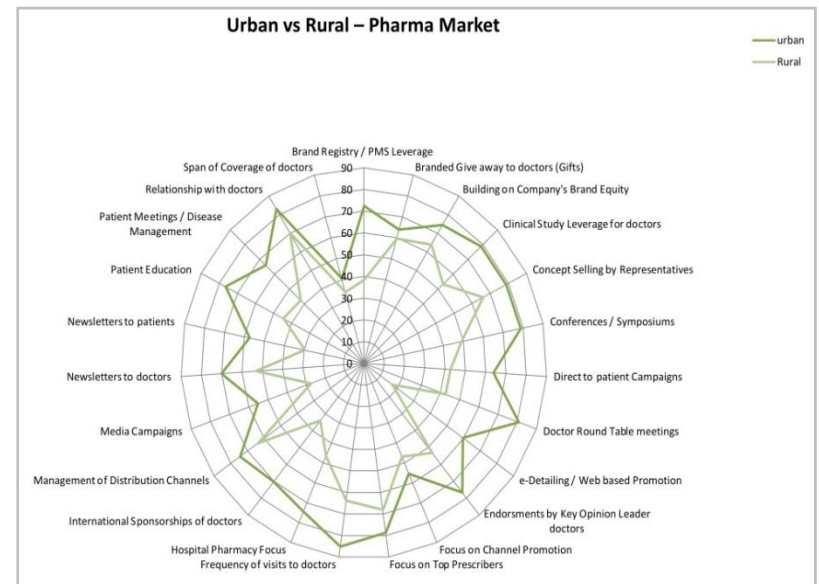
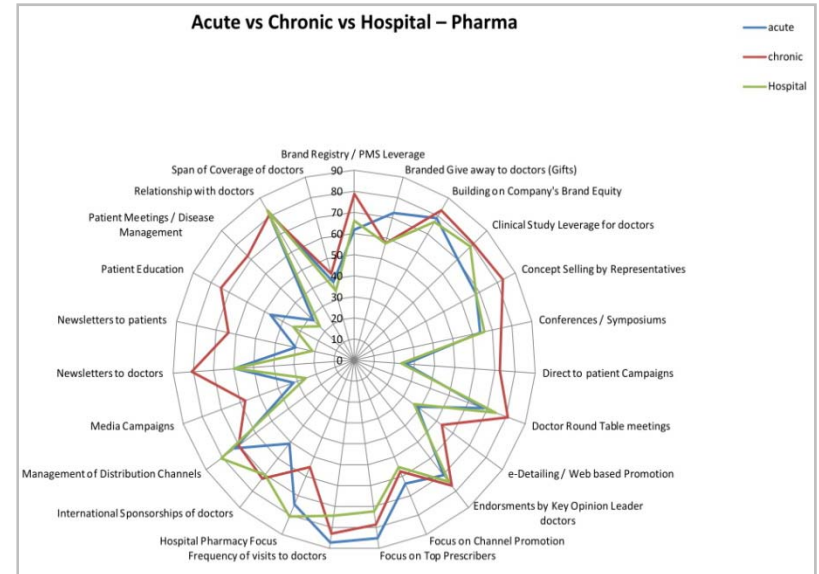
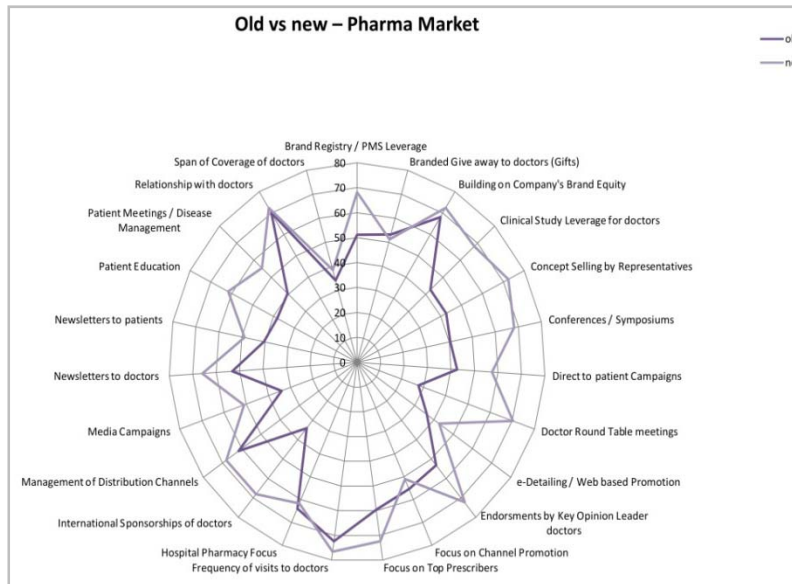
Please give reasons for your choice:

Feedback:

Analysis

Based on the responses from the questionnaires and personal interviews, we analyzed each tool and its preference in the market.

Graphs on following page.



Values in % people

Design Opportunities

- Frequency of visit to Doctors

This was rated as the most preferred tool. The doctor needs to be constantly reminded about the product. Salesmen wait outside the doctors clinic for hours to get a chance to speak with him. Despite the frequent visits and updating of doctors certain products manage to carve out a substantial share in the market because of confusing marketing tactics.

Molecule: Pregabalin – *Origin brand is Lyrica by Pfizer*



Indian



Rs. 830 for 100 capsules

All four brands are promoted in the neurology segment.



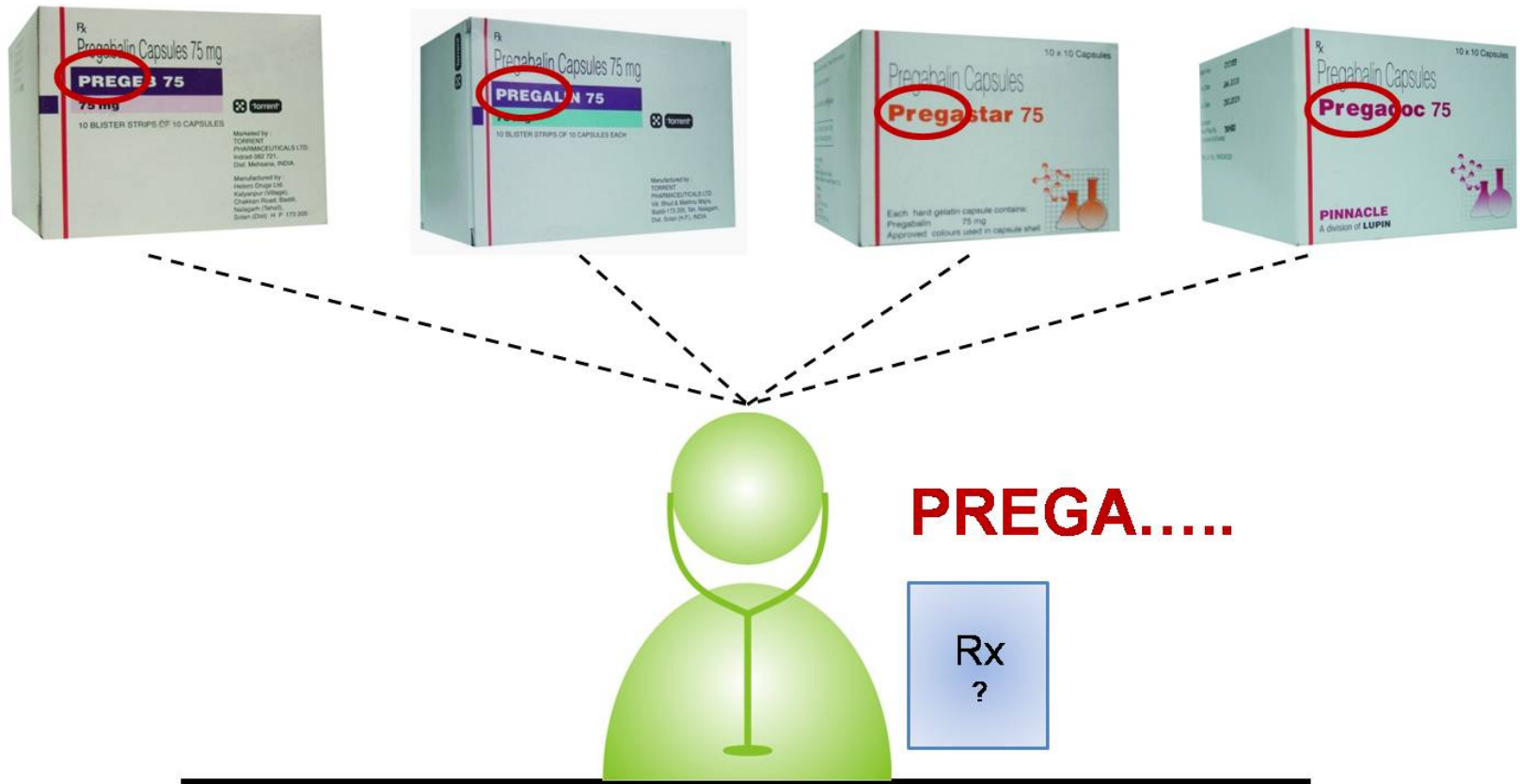
Indian MNC



Rs. 760 for 100 capsules

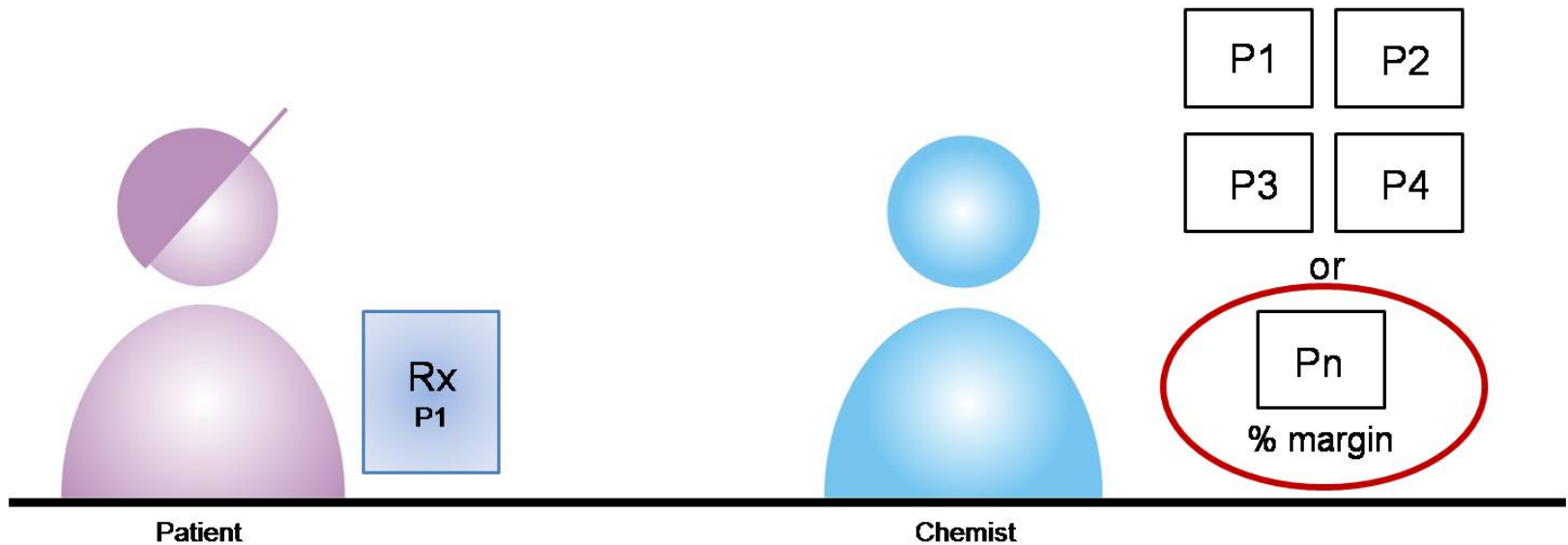
A Confusing Marketing Tactic

Giving similar sounding names.



Gives way to Substitution

on the chemist counter where ultimately
a local brand may be sold due to margin factor.



Colcin



Crocin



Both priced at Rs. 15 per strip



Cipcal - Cipla



Rs. 39.90 per strip

Shelcal – Elder Pharma



Rs. 44 per strip

Design Opportunities

- Conferences and Symposiums

Setup to educate doctors collectively where they can debate and learn about the products or discuss issues related to the drug. It's a one sided presentation with Q&A. The tool was also given high importance in the new product lifecycle and in the urban market.

A system that allows the doctors to access information and allows him to connect to the company salesman.

Design Opportunities

- Patient meetings and disease management.

This tool was given high importance in the chronic segment. Often the patients and doctors meet to discuss issues faced and how to overcome them with help of medication. A system that will enable the patients to connect to each and to doctors. Helping faster problem solving.

- Direct to Patient Campaigns

Targeting patients directly by offering a lower price and home delivery.

A system that connects the patient to a distributor and company so that he can get medication at a discounted price at his home and on time so he is never out of stock when his dose is over.

Design Opportunities

- Patient Education

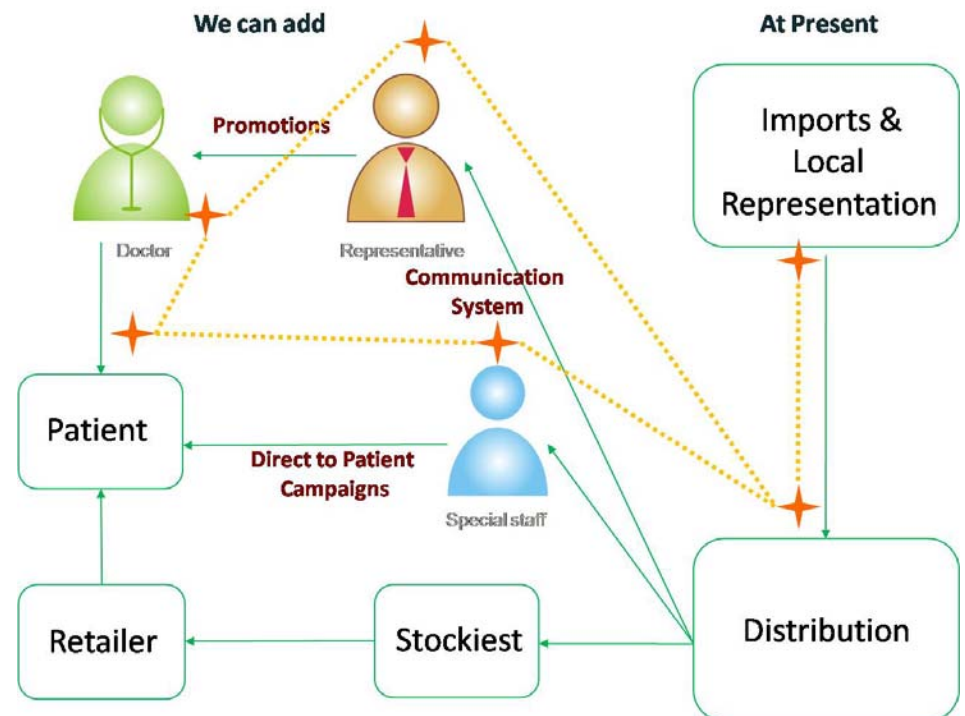
Direct education of patients (more in case of chronic therapy) usually via fliers and educational material given to doctor to keep in his clinic or waiting room. An interactive system that makes use of patients time in the waiting area of the clinics that allows him to access his profile with the doctors and thereby get further information on disease and diagnosis.

Design Opportunities

- Management of distribution channels

Management of the process of distribution so that medicines reach from one point to another efficiently.

Consolidation of various distribution channels so that efficient movement of goods is ensured.



Learning

This was my first industrial experience and was good, learned so many basic things to be followed in the Industry, the most important is the process that I learned to be followed in the industry for handling Interaction related projects, industry has a total different process to be followed to deal with the projects and the process that they follow is a little shortcut, than what we are taught here in IDC, they have a total different methodology and ways of looking at things.

Acknowledgements

Dr. Devdutt Pattanaik, *Project Guide*

Mr. Joe Desouza, *Consultant*

Mr. Vinod Dua, *Alkem*

Mr. Vete, *Sanofi Aventis*

Mr. Shirali, *Sanofi Aventis*

Mr. Kanan, *Cipla*

Mr. Zafar Khan, *software programmer*

Mr. Atul Shah, *Sahib Singh Agencies*