

ENGAGING DOCTORS AROUND THE GLOBE

NOVEMBER 2020





INTRODUCTION

Embedding a digital strategy as a prominent part of a pharmaceutical marketing campaign is becoming ever more important. Despite some perceived reluctance on the part of the industry, pharmaceutical companies are now exploring and exploiting a myriad of different digital channels in order to deliver content to, and engage with, their target audiences.

According to a recent global survey analysis by Indegene, the average allocation to digital channels from overall pharmaceutical marketing budgets in 2020 has doubled since 2016, to 34%. Over a third of companies reported they foresee an increase in their digital budget allocation to more than 50% over the next 3 years. Given the global impact of the COVID-19 pandemic, it is fair to assume that efforts to enhance digital capabilities will accelerate more quickly than originally expected. However, it is not only the value of digital spend that is changing, but the focus of that expenditure and the sophistication of methods being adopted. Across global campaigns, for example, pharmaceutical marketers are recognising the necessity to create customised content; the 2020 Indegene report found that 74% use personalising content and 60% use localising content as effective content strategies.

Digitally engaging doctors around the world nevertheless remains a challenge. A report from McKinsey concluded that while most pharmaceutical companies are building digital capabilities, efforts are often disjointed, being spread across multiple small projects, with a lack of cohesion of resource. In the absence of clear strategy and support from senior levels, obtaining sufficient funding and resource can be a hurdle. A need to acquire appropriate talent and form effective partnerships is widely acknowledged, however identifying the correct partnerships and ensuring maximum benefit is achieved can be challenging.

This whitepaper explores the common challenges encountered when planning and delivering a global digital marketing campaign within the pharmaceutical arena. The impacts of local knowledge, establishing and utilising trusted relationships with HCPs and a global-to-local approach are examined.

PROVIDING CREDIBLE, ENGAGING AND RELEVANT CONTENT, GLOBALLY

The main considerations of global pharmaceutical marketers at the start of a new campaign, be that a new product launch or a medical education project, might include: engaging with HCPs and providing credible information; creating an international brand image and brand awareness; achieving consistency of message and familiarity; increasing trust with HCPs and enhancing the reputation of the company. Below, common challenges faced by the industry in achieving these goals are explored, with regards to building relationships with customers, regulatory issues, and the management and delivery of a global digital campaign.

Building relationships with customers

In order to build and nurture relationships with doctors and other HCPs internationally, it is essential to understand and fully appreciate the differences between the countries in which they live and work, and to endeavour to address or accommodate them. In a digital marketing campaign, this can include a multitude of factors such as language, relevance of content, compliance, imagery and other cultural differences. Providing content which is relevant for the audience in a given location resonates with them and provides value, whereas irrelevant or unfamiliar content can be alienating.

Establishing trust requires an understanding of what is important to your audience. Considering the relationship between pharma and HCPs, an industry expert told M3 they believe that trust can be enhanced when unbiased and relevant content is developed thinking about each market individually.

Another aspect to consider is the variation in appetite for digital pharmaceutical content apparent between countries, in the context of the quantity of digital content currently available. IQVIA reported in 2016 on the proportion of specialties who felt digital activity fell short of demand, revealing a marked discrepancy country to country: 22% in the UK, compared with 0% in Japan, 87% in Germany, and 100% in Italy and China. It is likely that these opinions are evolving with time, in part due to increased quantity, quality and variety of digital offerings. Being able to meet the audience's demands with regards to the content they require is key in cementing a reciprocal relationship.



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Regulatory requirements and healthcare economies

The prescription and use of pharmaceutical products evidently vary from country to country, in terms of quantity, preferences, processes, payments and more. The global marketer should be cognisant of relevant differences between countries, which could affect the development, approval and distribution of marketing materials, as well as the reception from the end user. Healthcare economies can differ regarding phasing of licensing, and reimbursement strategies, for example, as well as specific compliance needs and distinct patient populations.

Thus, in developing a global digital marketing campaign, it is critical to be aware of label differences and prescribing differences, reimbursement and payment structures, as well as the relevant local compliance and drug promotion laws. Ensuring that all these factors are taken into account per market can present a challenge for a multi-country international project.

CONSIDERATIONS IN DELIVERING IMPACTFUL CAMPAIGNS

There is considerable variance across the pharmaceutical sector in the prioritisation of digital marketing and the internal structure and resource dedicated to these activities. From its inception, the success of a global digital marketing project may depend on:


- buy-in from senior management
- acceptance of digital channels as part of the main marketing strategy
- appropriate internal structure to support digital projects
- appropriate partnerships
- sufficient funding
- sufficient access to or resource for approval

Beyond this, a global marketing team is typically required to manage affiliates in all individual countries being targeted by a given campaign. This can require input into budgetary and resourcing issues, adaptation of content in keeping with brand expectations, and approval, in addition to ensuring timely and effective dissemination of content via appropriate and trusted channels.

Managing a shared goal across markets

Each individual country may have its own marketing priorities depending on its current landscape and market preferences. It is important for a global campaign to engage all participants at country level to attain their buy-in and ensure acceptance and appropriate prioritisation of the project. Depending on the organisational set up, budget may be held centrally or decentralised to separate markets. In the case of decentralised budget, it is typical for spending to be defined and earmarked upfront; deviation from this

can cause challenges in project delivery. One experienced digital pharmaceutical marketer explained to M3 that in his experience of running such campaigns, "It's the early buy-in at market level, that early engagement that really is key to being successful in those countries."



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Experienced digital pharmaceutical marketer

The use of digital marketing in the pharmaceutical sector varies significantly between countries - including between key markets, and markedly between emerging markets. The global marketing team may need to manage differences in digital experience and offer greater guidance and support where needed.

In addition, countries often have different activities ongoing concurrently, and different timelines, not least because drug launches or

updates to labels or guidance may not happen simultaneously. Within the scope of a global project, this could need careful management. The global team need to oversee timing and delivery of a project on a local level, along with ensuring the content is appropriate for that market. Consistency of messaging and branding is essential for creating or maintaining an international brand image, thus adaptation of content to meet local needs must be managed such that this continuity persists.

Resourcing differences between markets

Insufficient resource at different levels throughout the organisation can be problematic for the smooth running of a particular programme. Digital talent and experience at both global and local levels is desirable, but is likely to differ across markets. Likewise financially, key markets are less likely to depend on global budget whereas smaller or emerging markets may benefit

more from a centralised budget. Of particular importance is access to timely regulatory approval. Digital projects can comprise a large volume of content, and regulatory/ compliance resources within pharmaceutical companies have not always increased proportionally.

Defining and proving return on investment

A global marketer with many year's experience in running digital marketing campaigns in the pharmaceutical sector told M3 they believe there can be a lack of understanding within this industry of what ROI means in digital streams. It is harder to quantify an indirect effect of marketing rather than, for example, a direct increase in prescriptions, but it may be reflected in measures such as how engaged an audience is in your content, return visits, brand awareness or message recall. Any of these can indirectly influence prescribing behaviour. Furthermore, he suggests there is inadequate awareness of the simple metrics and measurements used in defining digital activity, such as open rate or impressions. Education in this and into how digital ROI complements that of traditional marketing activities is necessary, as is defining from the outset a quantifiable goal.

Within international projects, key performance indicators are often defined at a local level and it can be challenging to analyse data globally. Inconsistency makes comparison between markets complex. Understanding the success at a country level allows for best practice to be shared between countries, both between campaigns and within a campaign, for example where drug launch times are staggered. Furthermore, evidence of ROI adds power to future projects and allows previous successes to be built upon.

“It is important not just to think of digital activities alone, but in terms of how they can complement the entire marketing strategy.”

Industry expert



APPRECIATING THE FULL LANDSCAPE OF EACH MARKET

Know your markets

Healthcare around the world is an extremely complex affair. Individual countries have divergent practices. Cultural differences around the world affect the preferences and behaviours of those who work within healthcare. Legal and regulatory aspects may be riddled with nuances and specific rules. An appreciation of the healthcare economy and empathy with HCPs who work within it are essential for creating marketing content which is credible and engaging for that audience.


Tailoring content per market

It is common for materials to be created at the global level, and then distributed to affiliates in different markets for dissemination. Katy McPherson, Head of Commercial Excellence at M3, reflects that several companies with which she liaises are becoming disenchanted with their current global approach, where the same content is circulated in different countries. The primary concern is that of alienating HCPs in certain markets, and there is an increasing desire to move towards a more bespoke model.

Much digital marketing content can be reasonably used across multiple countries, maintaining consistency of messaging and alignment with brand guidelines. An industry expert told M3, "80-90% of any campaign can be translated, can be used, with tweaks." Compliance rules, drug promotion laws and regulatory legalities must be taken into account and adhered to on a country-by-country basis. In-depth knowledge of these

areas is therefore required to adapt marketing content appropriately. Furthermore, there may be differences in licence indications or dosing regimes, as well as in reimbursement procedures. Different regions may also follow alternative disease management guidance.

Beyond that, the patient population may differ between countries. Demographics, disease prevalence, and treatment priorities may affect the relevance, importance and suitability of information to an HCP. There may be cultural aspects that affect how a campaign will be received, or may directly influence the uptake of a medication in that region.



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Tim Russell, VP Head of Business Development at M3, believes that content must be "at worst, translated, at best adapted". A survey of 3,000 consumers from around the world found that, across industries, 75% prefer to buy products in their native language, with 60% rarely or never buying from English-language only websites. Even considering adaptation of content into a relevant language, a straight translation,

especially of medical or scientific content, may miss nuances and subtleties of that language. Another consideration is acceptability of common languages across countries, for example British versus American English. Allowing HCPs to access information in their preferred language increases engagement and broadens the levels of understanding across that readership, but also enhances their feeling of worth.

Deploying and disseminating digital marketing per country

There are variations in both the legal specifics and audience preferences regarding dissemination of pharmaceutical marketing content between countries. This can affect the digital platform employed, technical details and type of deployment. A pertinent example is the necessity, as in the UK, for promotional material to be

behind an HCP-specific log in. Consent to receive marketing information and data protection affairs may differ too. Many countries have websites and platforms with which the HCPs are familiar and comfortable; these can provide a 'ready-made' trusted channel allowing access to an engaged readership.

ADDRESSING THE NEEDS OF GLOBAL CUSTOMERS

It is vital to have a clear and pragmatic strategy with which to initiate a global digital marketing campaign. This involves careful scoping of project parameters, the right research, an understanding of resource allocation and definition of KPIs from the start. It is also important to engage affiliates who will be involved, and to identify and utilise partners who can aid the smooth running of the project.

Clear strategy, simple process, effective results

Outsourcing and subcontracting global campaigns to an experienced third party can reduce internal burden and resource requirements, additionally utilising proven processes and ensuring consistency across the project. M3 is the world's largest network of doctors with over 5 million members across both M3-owned platforms and Networks in Health, a highly effective international alliance of trusted online healthcare communities in key markets. M3 can facilitate and manage global pharmaceutical marketing campaigns, taking advantage of this well-established network of partners, of which Doctors.net.uk is just one.

M3's Networks in Health partners, embedded within their markets, have a wealth of relevant local knowledge and can advise and guide from the outset. This provides a richness of understanding across markets that can help a pharmaceutical company to formulate a successful strategy. Understanding the climate in a given environment, and recognising that an experienced and relevant partner will be involved, can also ameliorate issues with initial buy-in from internal affiliates.

A custom-built strategy and flexible tactics allow a campaign to be designed, adapted

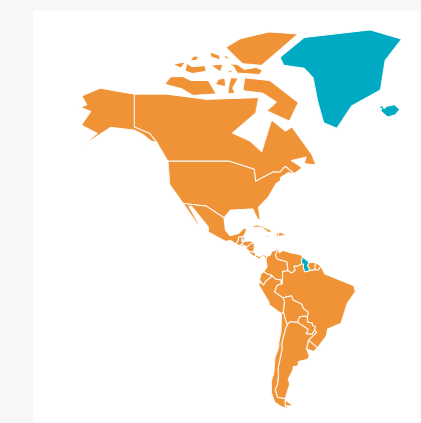
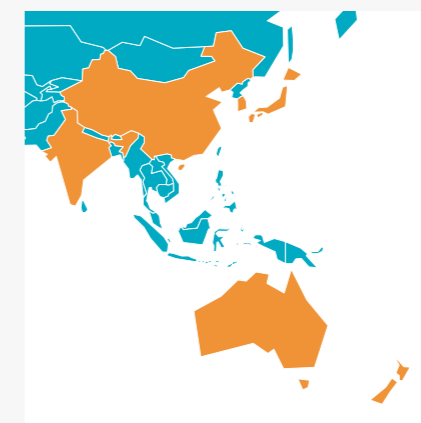
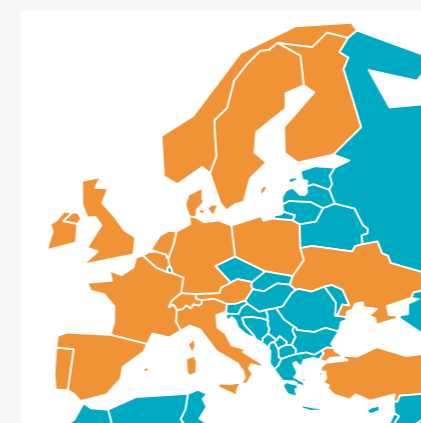
and accomplished in a manner aligned with the company's targets. During the planning stages, M3 can create a budget menu per market, offering a bespoke approach with well-defined expenditure, and options for increasing or reducing scope as necessary, for example to focus on specific key markets. This can be beneficial for managing costs and project span whether budgets are held centrally or are decentralised.

When asked to describe the most critical success factor when embarking on a global campaign, Tim Russell at M3 said, "engaging with local markets: the service provider with its partners, and the pharma company with its affiliates. Then when you bring these two arms together you arrive at a solution that is aligned to both global strategy and local needs."

M3 and its partners can develop bespoke campaign evaluations and employ detailed data analytics to profile engagement and impact of a project within and between countries. As well as proving ROI, this can enable input into an iterative marketing plan, aligning outcome with brand goals and augmenting and enriching the relationship with the doctors.

"There needs to be simplicity and realism about how executable a campaign can be."

Industry expert



The Networks in Health alliance brings together highly experienced healthcare communities and platforms across the globe, supporting global digital marketing campaigns in the pharmaceutical sector from project conception through delivery to evaluation.



A global-to-local approach

Which overarching strategy is most impactful for targeting HCPs and delivering material that resonates with them? M3 asked two experienced global marketers for their opinions of the advantages and disadvantages of using a 'one-size-fits-all' campaign, as compared with a more market-specific tailored approach. Both of the experts agree that a one-size-fits all campaign delivers global brand recognition and consistency of message. Furthermore, it can provide assets that could be used globally in the future. However despite these attractions, it is still necessary to be flexible and adapt the content by country as required.

One global marketer explained "the most successful brands are the ones that have an international identity and are aligned as much as possible with the global campaign, but also draw on local insight." He advocates an 80%-20% or 90%-10% approach, whereby the majority of the content, as created by the global team, remains intact and identical between countries, with 10% or 20% typically needing adapting, by local teams, to match their culture, license indications and regulations.

The second global marketer explains that "Being flexible at a market level allows for appropriate customisation while retaining global messaging." He has adopted a method of creating global content with different options from the start, which can be selected per market to align to their local needs. Examples would include alternative

headlines, or alternative images and alternative wording designed to meet specific country regulations. Creating content in this way increases the workload for the global team, as opposed to the strategy whereby identical content is distributed to individual country affiliates and further refinement of the content falls under their jurisdiction.

Producing tailored content, regardless of the extent, by definition increases the level of input necessary, and as such it is necessary to manage expectations according to project progression. That additional workload can be managed by a third party. And the pay-off should be significant: increased time and effort in content production could result in greater resonance with the consumer, improved perception of the company or brand, and increased trust and credibility.

At M3, a global-to-local approach is championed. M3 has proven success working with global marketing teams to create powerful proposals and deliver impactful campaigns. Its network of global partners can be used to manage all project requirements at a country level, from content creation or adaptation, to compliance and approval, to dissemination, through to campaign evaluation. Using a global-to-local approach allows a top-down view of projects, strategic dynamics and provision of materials, combined with an in-depth local working knowledge of day-to-day issues and the strategies for their resolution.

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Experienced digital pharmaceutical marketer

CONTENT PRODUCED AT A GLOBAL LEVEL



M3 manage multi-country pharmaceutical campaigns at global and local levels, complementing and enhancing their client's omnichannel marketing approach

Tapping into established relationships

In addition to strategic planning, content development and adaptation, and global and local management of digital programs, M3 offers trusted channels through which marketing materials can be delivered to an established and engaged audience. In 2017, the Decision Resources Group's Manhattan Research study revealed that of 2,784 clinicians, the proportion who viewed pharmaceutical websites as credible sources of information was only 27%, compared with 77% for third-party HCP-facing websites.

M3's online networks are established channels with which users have an existing relationship, allowing global clients to engage with doctors of all specialties in a meaningful way. Content

is created and deployed to provide maximum engagement, based on insights into the interests, behaviours and preferences of doctors built up from many years of experience of digital interactions.

Furthermore, the ownership of content created as part of an M3 collaboration lies with the pharmaceutical company client. The entire package of global and local materials is available during and after the campaign for use by sales teams in the field or any other distribution channel deemed pertinent. Thus messaging can be reinforced through additional interactions or the overall reach of the campaign can be boosted.

CONCLUSION

Challenges surrounding the delivery of a global pharmaceutical digital marketing campaign are multifaceted. Employing a partner with broad international reach, established and trusted access to millions of doctors worldwide, and deep strategic insight, can overcome the hurdles global marketers face. M3 deliver centrally-managed campaigns, adapting them to work at the local level.

“Sourcing a provider who can create powerful, globally-aligned, territory-specific content, and who can then distribute it locally, and deliver meaningful engagement: that’s got to be the holy grail.”

Tim Russell, M3



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