

COVID-19 has become a catalyst for digital promotion of pharmaceuticals

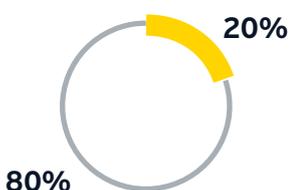


The goal of the survey was to analyze changes in approaches to organizing the work of medical representatives in the Russian Federation, the USA, Europe, the Middle East, Africa and Latin America.

In summer 2020, the EY global team conducted a survey of the international pharmaceutical market. During the survey, respondents from various functions of pharmaceutical companies shared their expert opinions.

Later, in September-October 2020, EY Russia professionals conducted a similar survey of major pharmaceutical companies operating in the Russian market. We interviewed employees at various levels: middle managers directly responsible for the work of medical representatives and top managers leading the Russian units of pharmaceutical companies.

Share of international and Russian pharmaceutical companies in the survey



- Russian
- International

Share of innovative and generic companies in the survey



- Innovative
- Generic

Product portfolio of the surveyed pharmaceutical market players in Russia



- OTC/RX
- RX

Contacts



Dmitry Khalilov

Partner, Life Sciences Leader for Central, Eastern and Southeastern Europe & Central Asia

Tel.: +7 495 755 9757

dmitry.khalilov@ru.ey.com



Anna Guseva

Partner, CIS Life Sciences TAS Leader

Tel.: +7 495 641 2944

anna.guseva@ru.ey.com

1 The active development of digital channels opens up new opportunities for communicating with the target audience.

Benefits of digitalization:

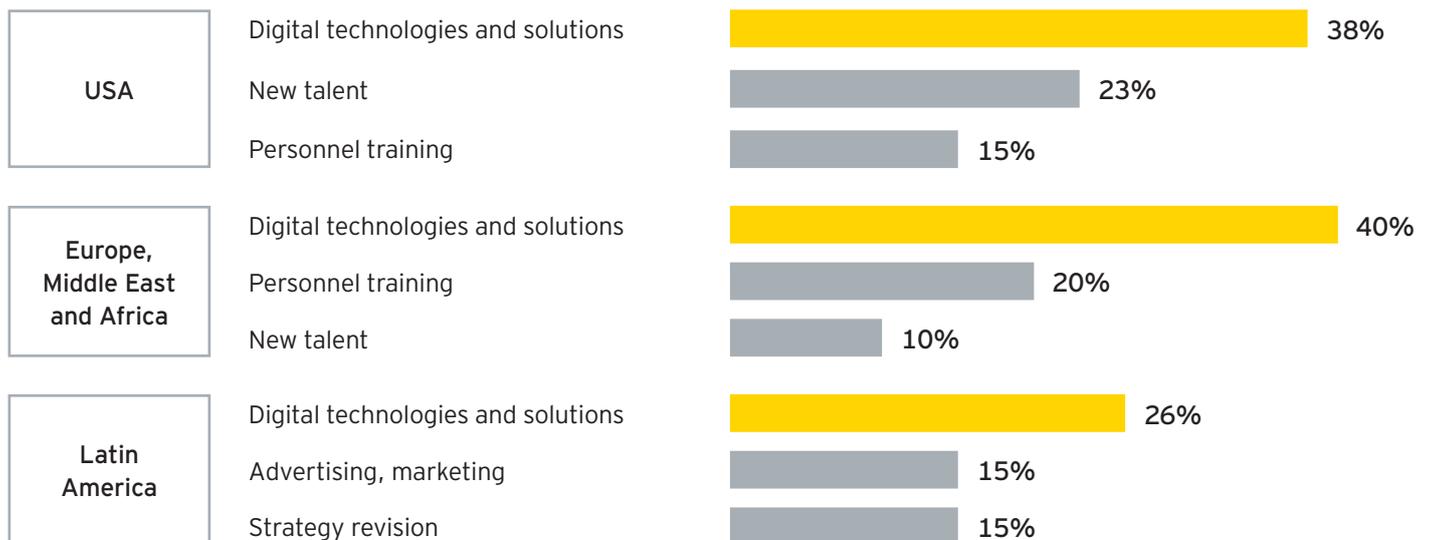
- 1 Higher quality of patient care and improved treatment results
- 2 Prompt access to information on treatment methods and doctors trained using modern digital technologies
- 3 Patients making well-informed decisions about the treatment process
- 4 Two-way communication between the doctor and the patient
- 5 Higher patient's adherence to treatment
- 6 Stronger partner relations with medical representatives

2 According to the EY global survey, digital technologies and personnel training are top investment priorities for the majority of the surveyed pharmaceutical companies.

Pharmaceutical companies around the world are ready to invest in digital technologies and solutions to build a direct link with consumers.

They are willing to put their money in personnel development and new talent who can work in the digital field in today's changing environment.

What areas does your company invest in?



3 The share of virtual communications will remain at around 30% even if quarantine restrictions are lifted and medical representatives get back to business as usual.

Global picture

- ▶ Digital promotion channels account for 60% of all multiple-channel communication between companies and doctors.
- ▶ As a result, 30% of respondents expect a reduction in the number of medical representatives over the next year or two.

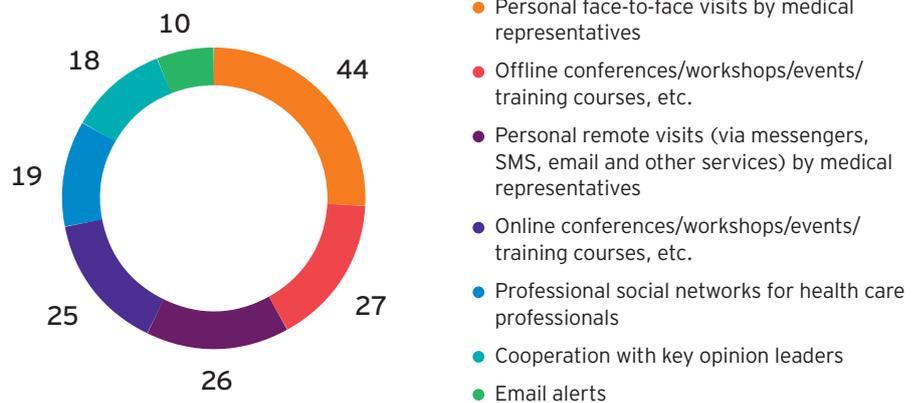
Local picture

- ▶ Despite relaxed quarantine restrictions, electronic communication channels account for 40% of multi-channel promotion by pharmaceutical companies in Russia.
- ▶ 82% of respondents believe that the share of face-to-face meetings and offline communication will not return to the previous level in the short term, and online visits will remain the preferred option.
- ▶ 64% of respondents expect growth in demand for experts in electronic promotion channels.

4 Personal remote visits are the third most effective channel of communication with doctors in Russia.

- ▶ 82% of respondents concur that medical representatives should be trained in remote visit techniques.
- ▶ 44% of companies are considering full or partial outsourcing of the pharmaceutical marketing and promotion function.

Integral indicator of channel importance based on the survey results*



* The sum of indicators may exceed 100%. More than one answer could be selected.

5 Content differentiation and adaptation are critical to the successful promotion of pharmaceuticals.

73% of the surveyed market players in Russia are convinced that they need to develop and implement special digital marketing tools, such as:

- ▶ **Third-party platforms**
- ▶ **Professional social networks**
- ▶ **Proprietary promotion platforms.**

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ED None.

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