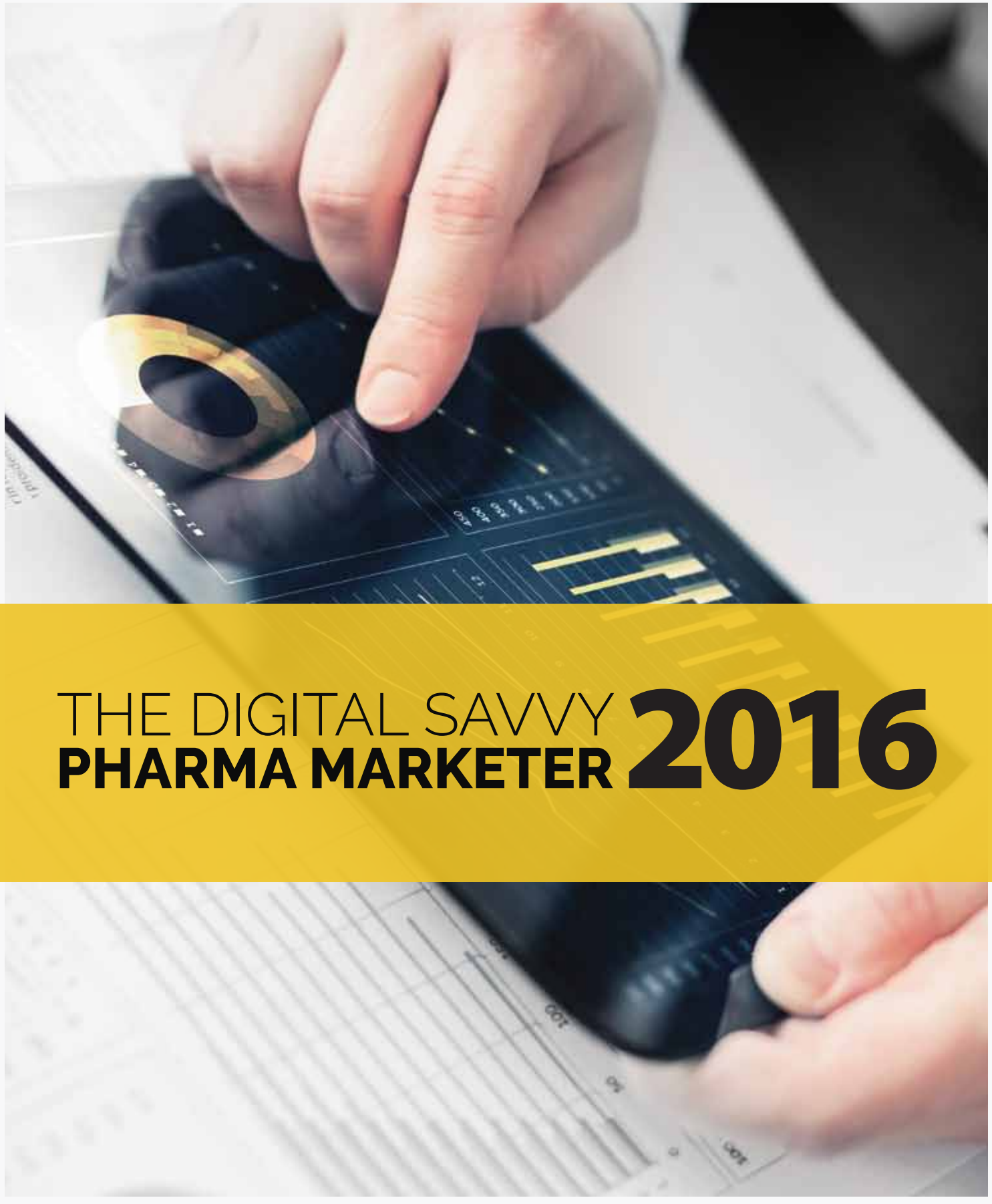
PHARMA*FUTURE*™
An Indegene Initiative



THE DIGITAL SAVVY **PHARMA MARKETER 2016**

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Executive Summary

- In 2016, the global pharma marketer spends an average of 14.85% on non-personal digital channels.
    a. China and the USA are ahead of the curve in non-personal digital spend at 33% and 31%, respectively, spending over 20% annually.
    b. Currently, Brand Promotional Emails, KOL Webinars, and HCP Portals are the top 3 preferred channels by the global marketer to engage HCPs.

- By 2018, it is predicted that the global pharma marketer will spend 19% of their marketing budgets on non-personal digital channels.
    a. 50% & 40% of marketers in China & USA spending more than 20% on digital channels.
    b. By 2018, KOL Webinars, Social Media, and Mobile Apps are expected to become the most preferred channels of engagement.

- The survey revealed that for every $100 spent on the digital budget by the global pharma marketer, $17 is spent on Brand Promotional Emails & KOL Webinars individually and $15 on HCP Portals among others.

- KOL Webinars were identified as the most ROI-generating channel.

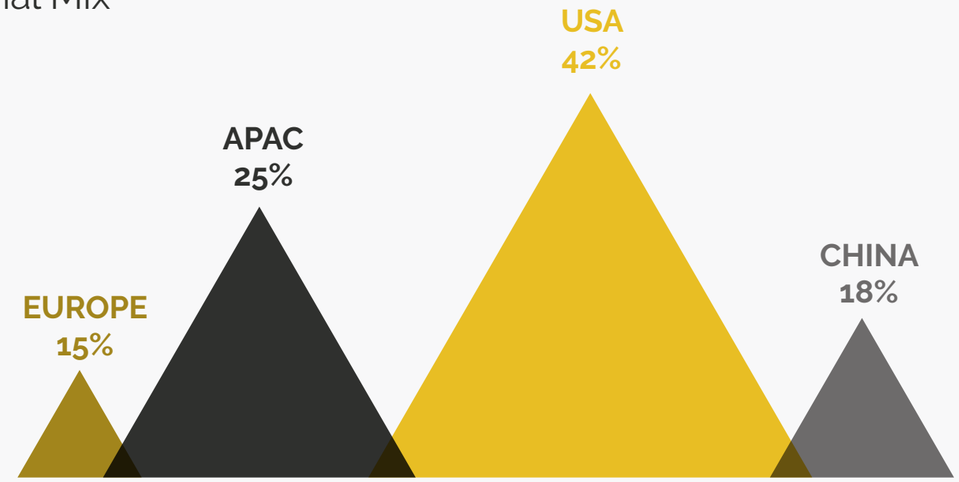
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Research Scope

100+ pharma marketers of the top 40 lifescience companies responded across the USA, APAC, China, & Europe representing commercialization functions.

This report summarizes key trends in the digital landscape of lifescience companies pertaining to adoption of different channels for the engagement of healthcare professionals (HCPs).

Regional Mix

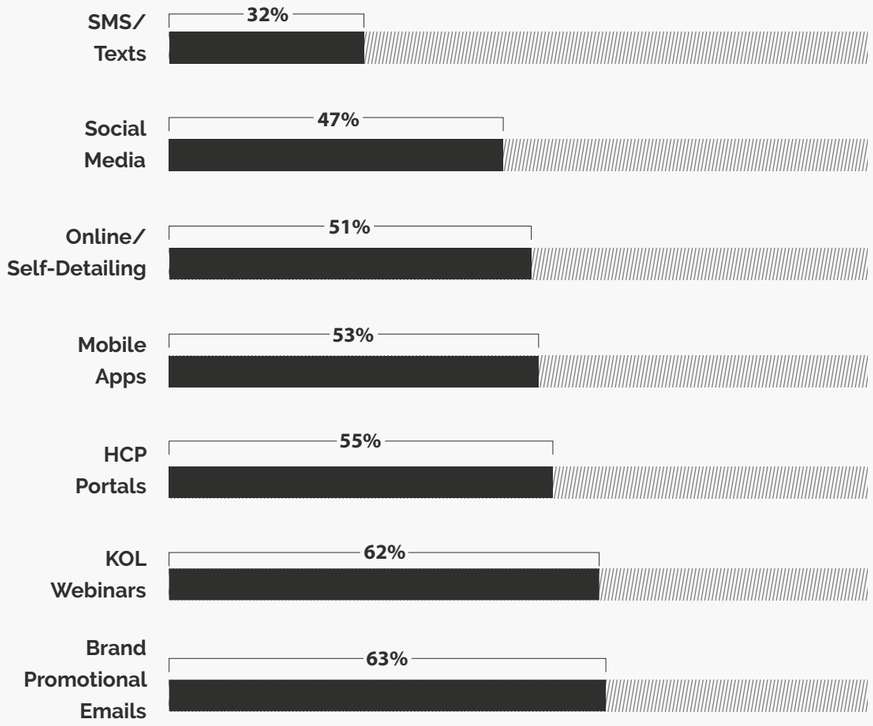




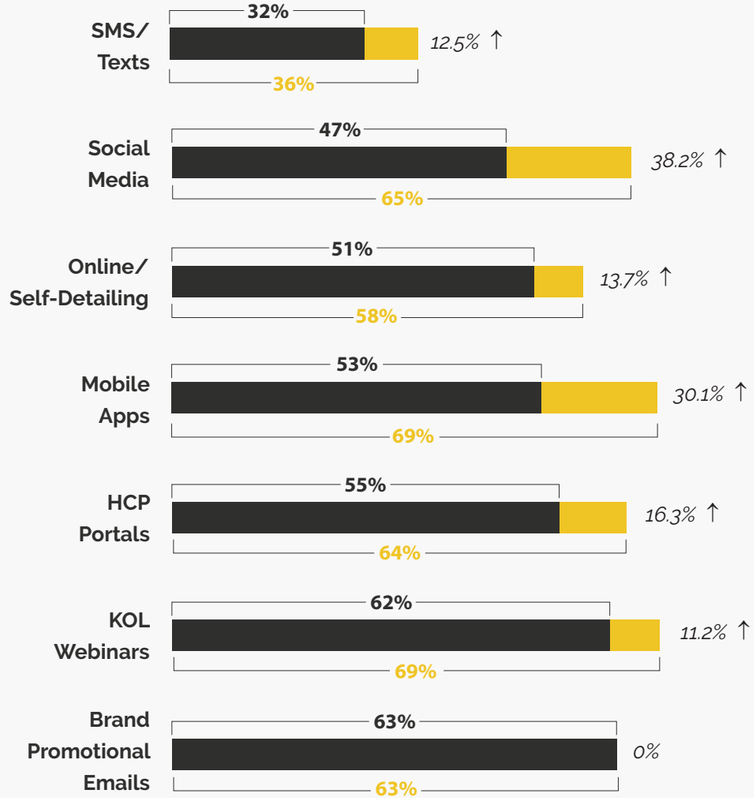
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01. Global Channel Preference in 2016

Describes the aggregate preference for each channel



Projected Global Channel Preference in 2018



2016 2018

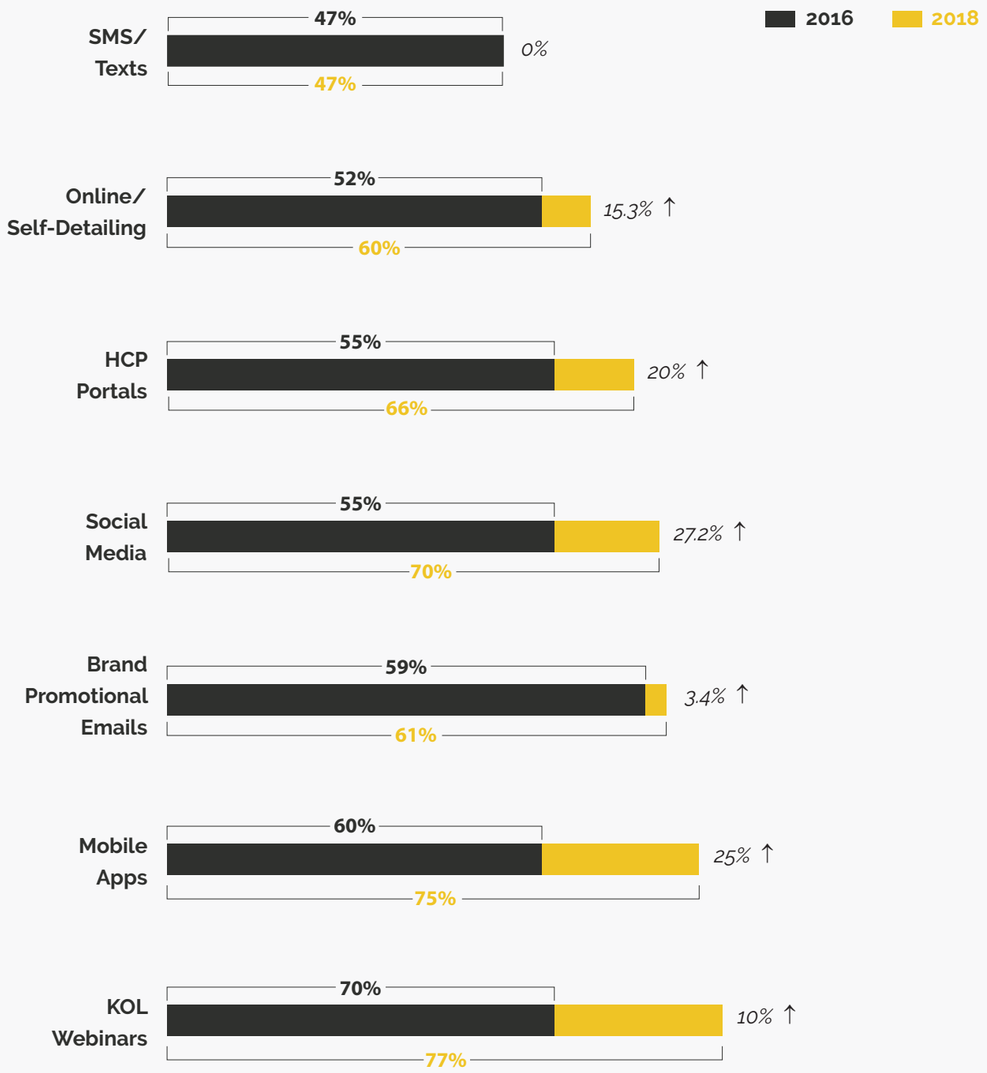
Increased worldwide usage of smartphones and mobile devices has opened up the possibilities of mobile social networks. We sight an increase in the preference of top 3 channels – Social Media, Mobile Apps, and HCP portals. Social media preference is poised to increase by 38.2% by 2018.

CURRENTLY, BRAND PROMOTIONAL EMAILS, KOL WEBINARS, AND HCP PORTALS

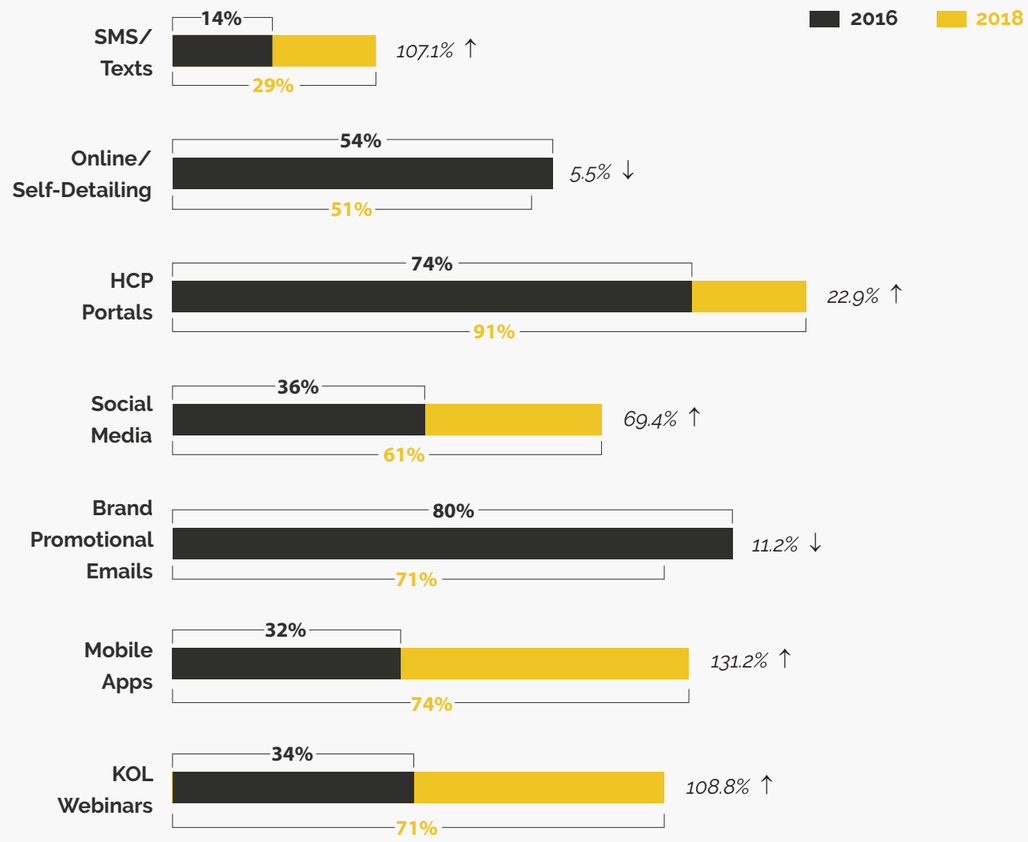
emerge as the top 3 preferred digital channels to engage HCPs

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Channel Preferences in APAC



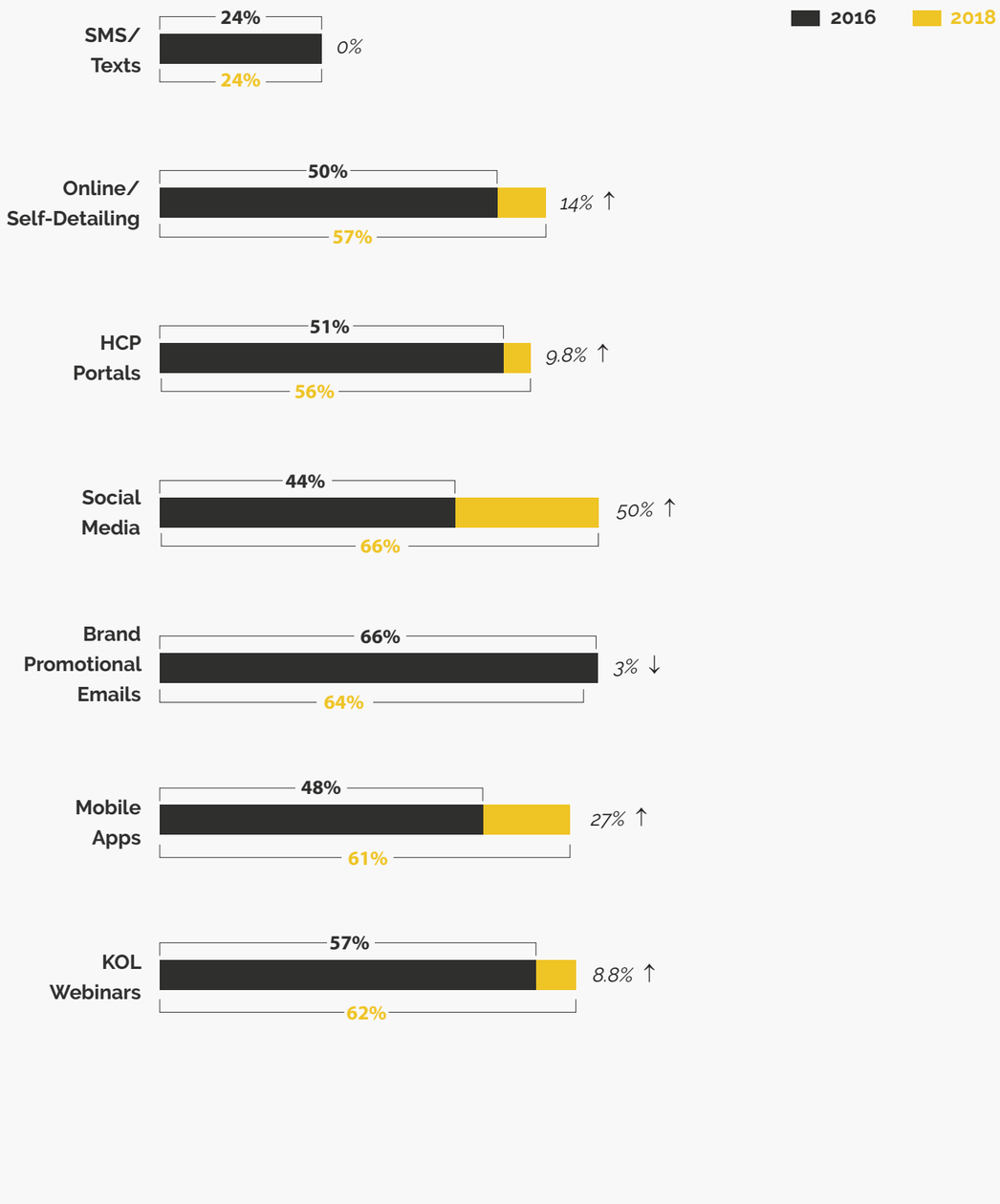
Channel Preferences in Europe



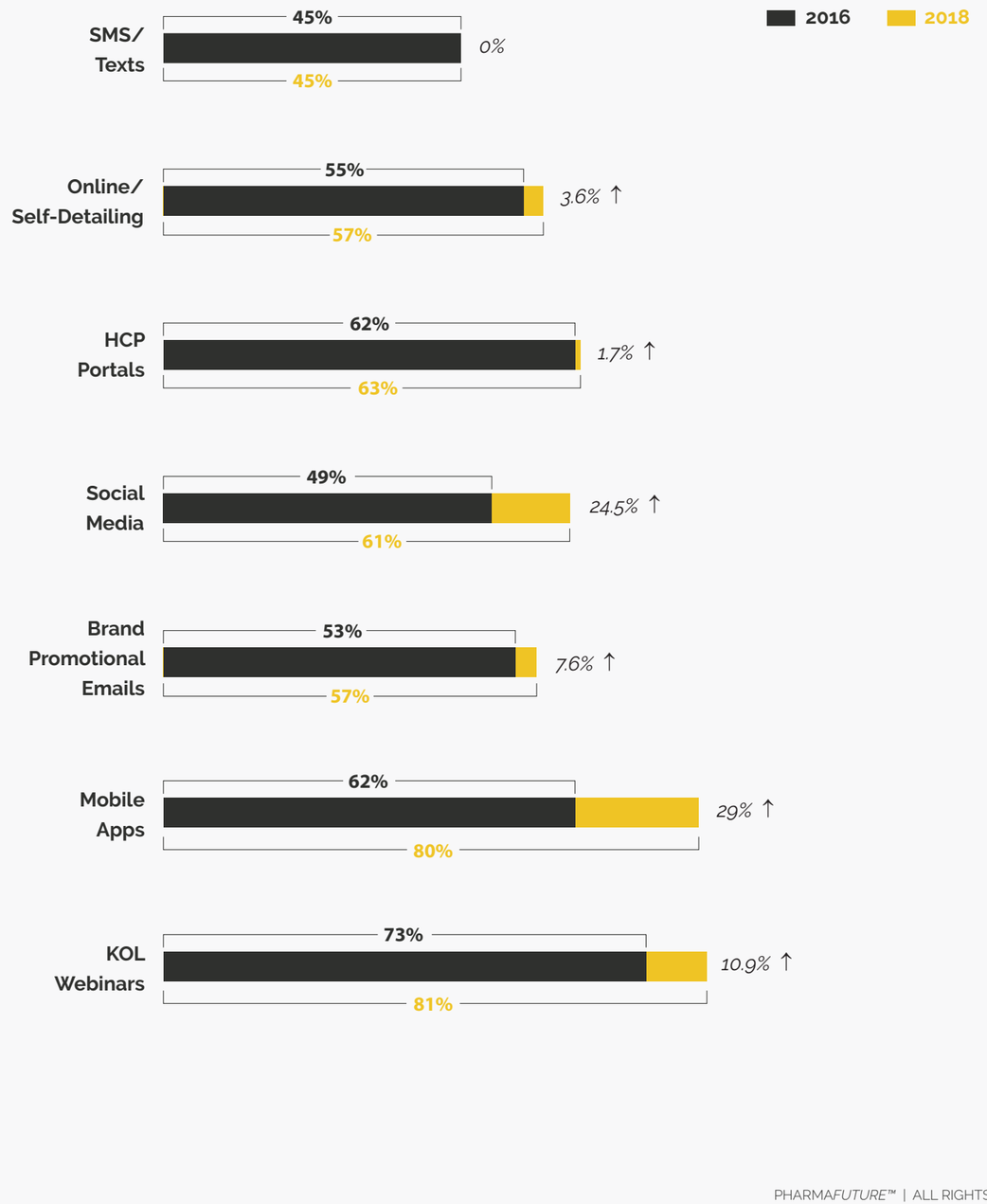
MOBILE APPS,
which have a relatively low score in 2016, is expected to grow by **131.2%** by 2018

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Channel Preferences in the USA



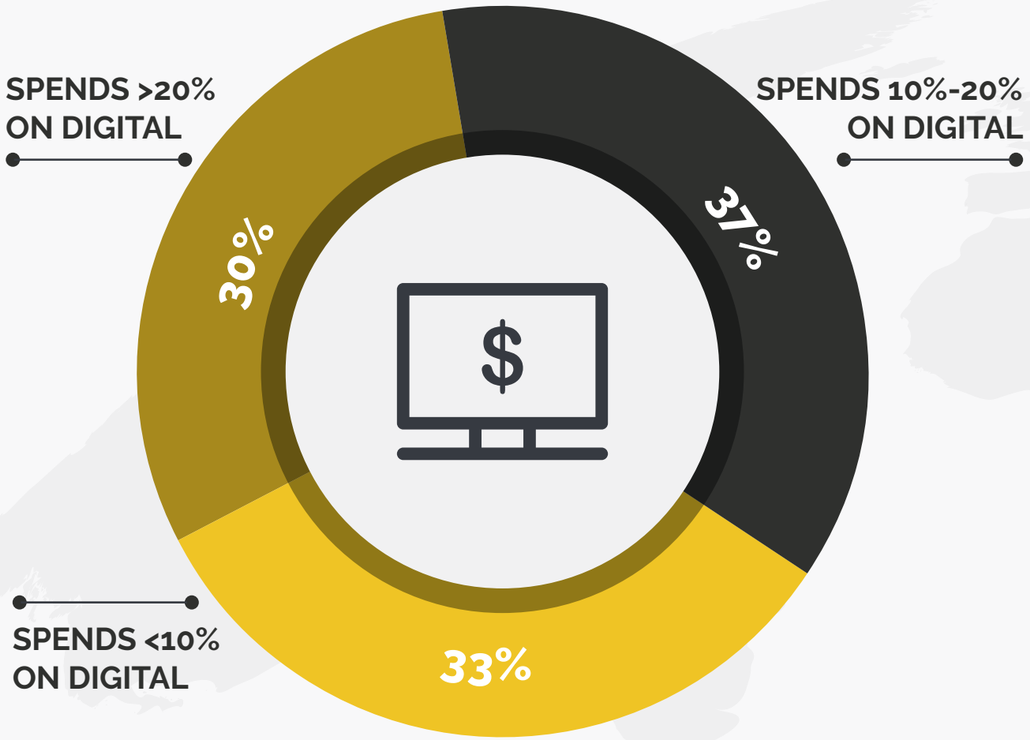
Channel Preferences in China



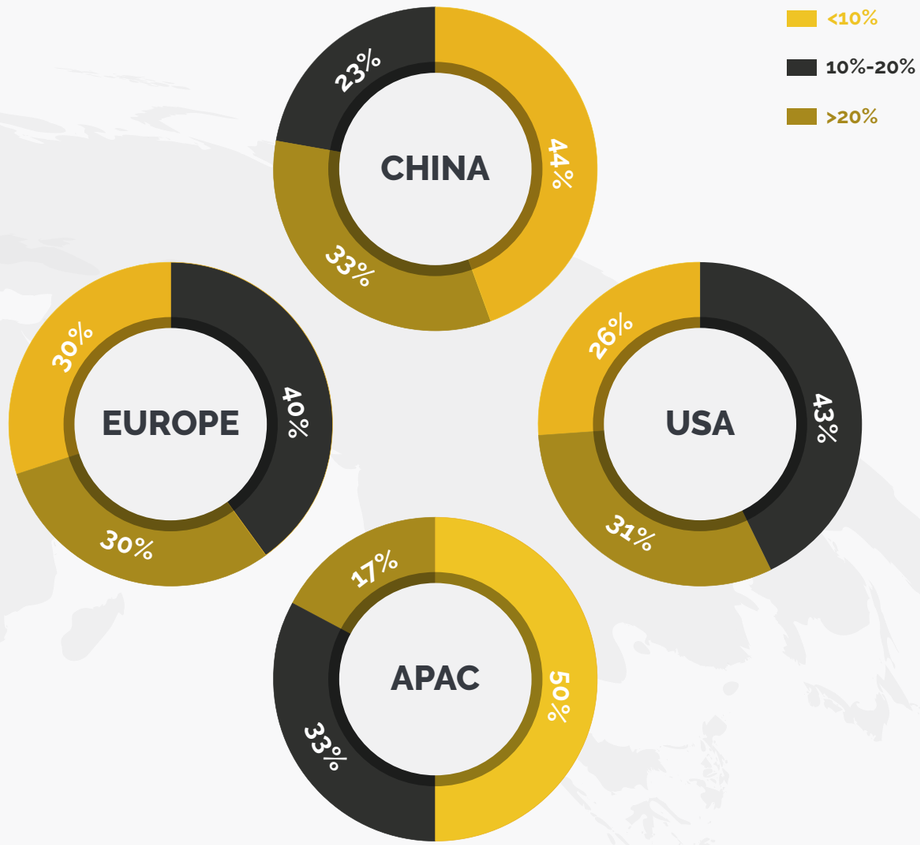
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02. Global Digital Investment

Describes digital budget allocation as % of marketing budget



Digital Investment by Region





30% OF MARKETERS

spend >20% of their overall marketing budget on

DIGITAL INITIATIVES



1 IN 2 MARKETERS

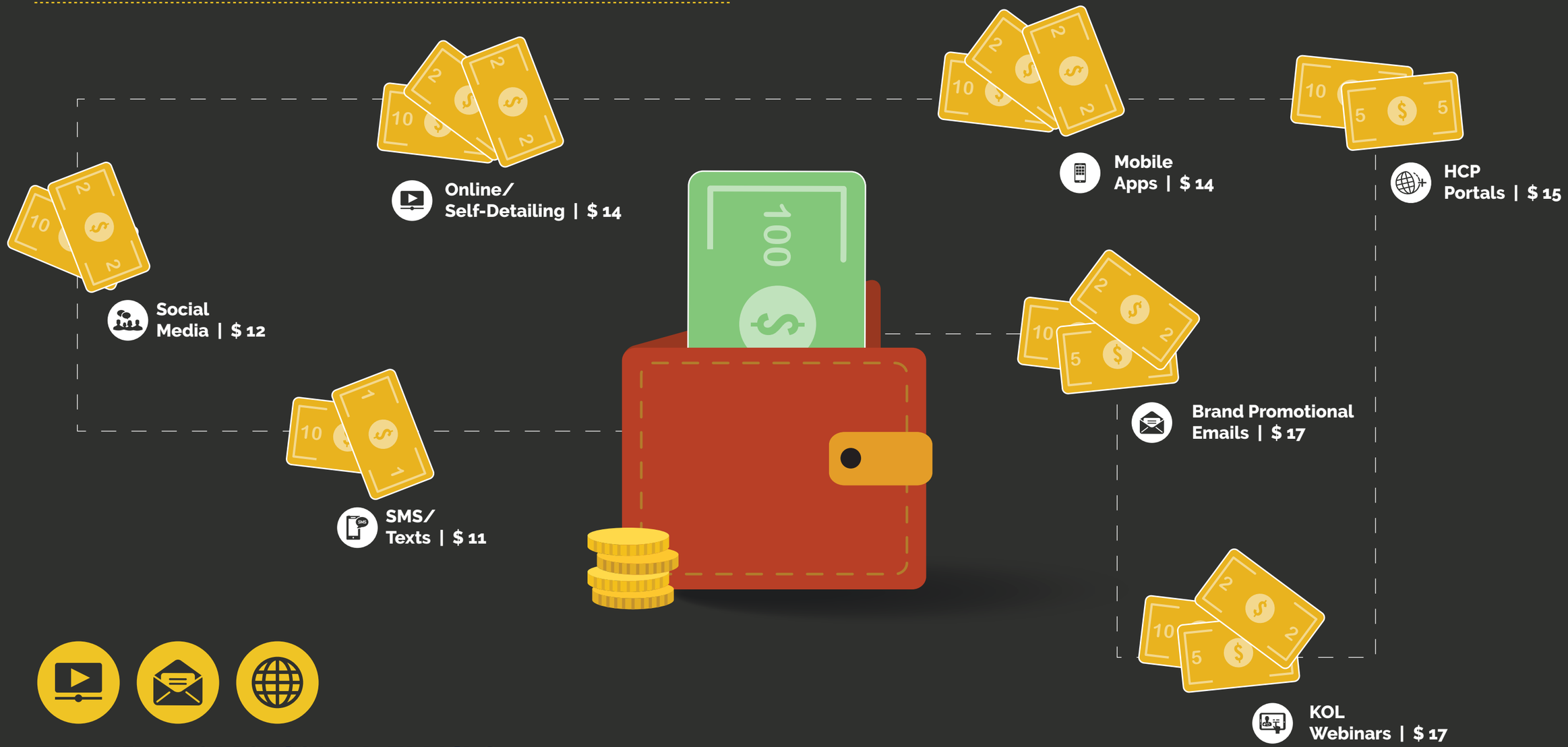
in APAC spend >10% of their overall budget on

DIGITAL INITIATIVES

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Global Pharma Marketers' Digital Spend –

How a typical pharma marketer spends $100 on digital today



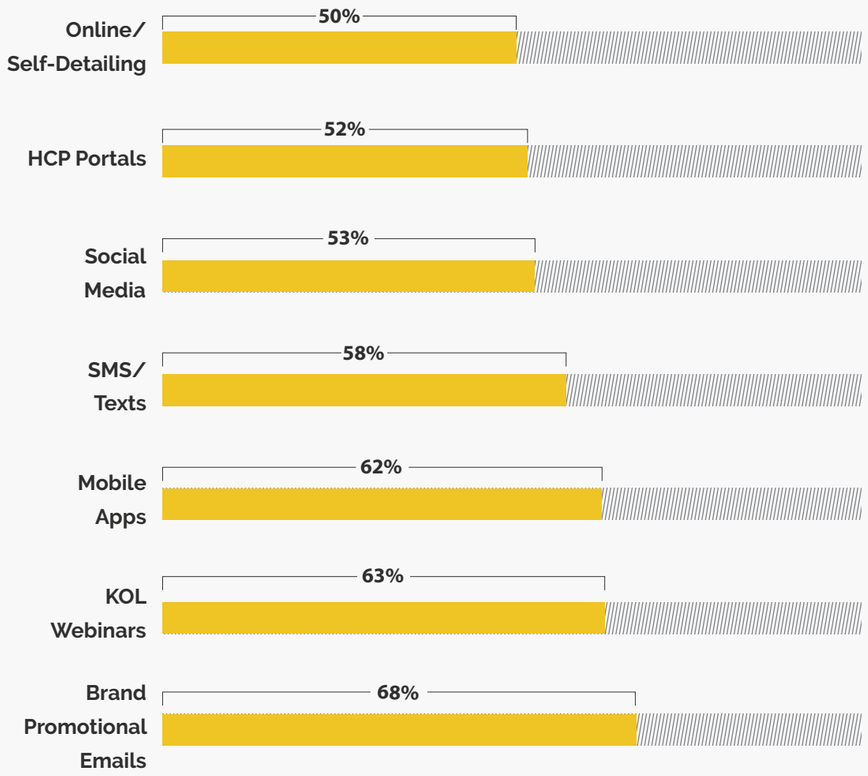
BRAND PROMOTIONAL EMAILS, KOL WEBINARS AND HCP PORTALS

are the top spending channels preferred by marketers

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03. Reach and ROI Indicators

Most preferred channels to reach HCPs

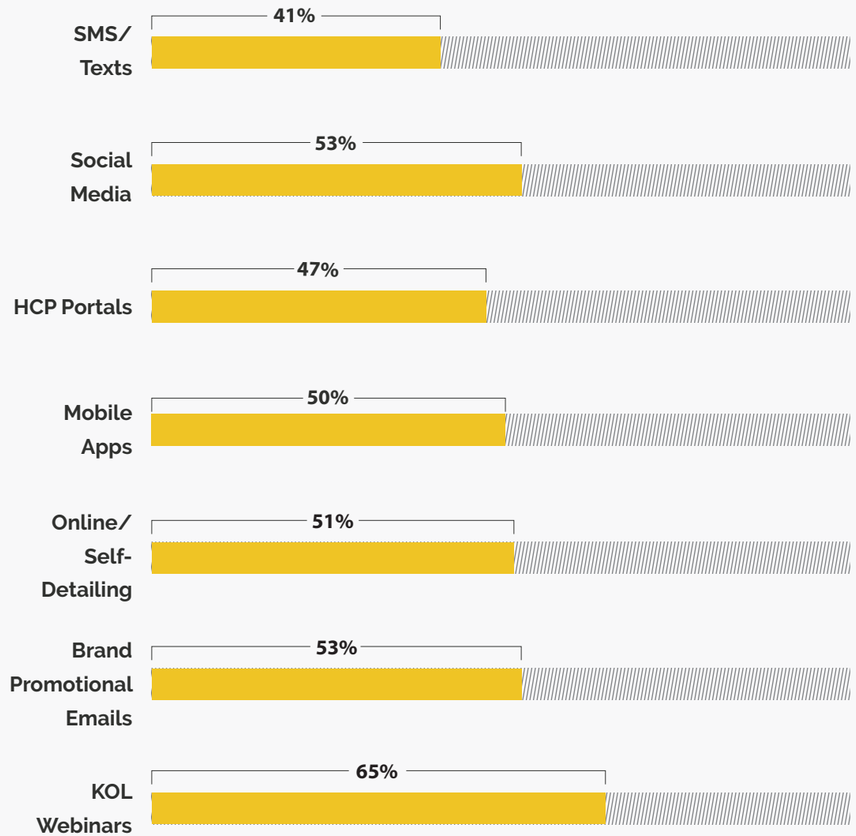




BRAND PROMOTIONAL EMAILS, KOL WEBINAR, MOBILE APPS

are the top 3 channels used to reach HCPs effectively

Highest ROI-generating channels



The highest ROI-generating channel was found to be KOL Webinars, followed by Brand Promotional Emails and Online/ Self-Detailing.

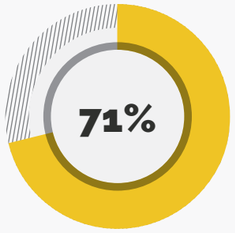


KOL WEBINARS, BRAND PROMOTIONAL EMAILS, ONLINE/SELF-DETAILING

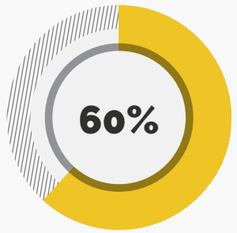
are the top 3 channels that create the highest ROI according to marketers

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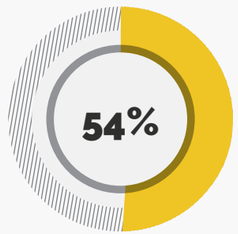
04. Challenges in Implementing Digital Programs



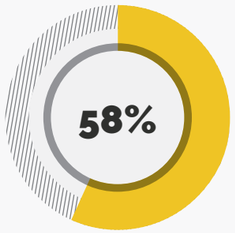
Demonstrate ROI



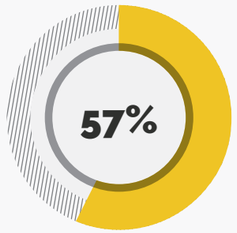
Response Rates



Change Management



Setup Costs



System Integration

Demonstrating ROI has emerged to be the most important factor in deploying MCM programs. Setup costs are still important, but the research suggests that if ROI can be demonstrated, pharma marketers will make investments upfront.



7 in 10

consider measuring ROI a major barrier when deploying

DIGITAL MARKETING PROGRAMS

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