

Dissertation Training

at

Cognitrex Consultants Pvt. Ltd.

In Depth Brand Intelligence of An Indian Pharma Industry
(Sun Pharma – Pharma Division)

by

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PG/21/003

Under the guidance of

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2021-23



International Institute of Health Management Research New Delhi

The certificate is awarded to

Aashish Garg

in recognition of having successfully completed his/her internship in the department of

Healthcare Practice Department

and has successfully completed his/her Project on

**In Depth Brand Intelligence of An Indian Pharma Industry
(Sun Pharma – Pharma Division)**

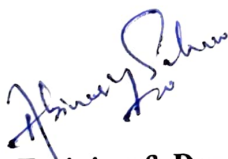
13th January 2023 – 12th April 2023

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CEO And Founder

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Aashish Garg

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I hope that I can build upon the experience and knowledge that I have gained and make a valuable contribution in coming future.

Aashish Garg

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PREFACE

ABSTRACT

The systematic method of acquiring, analyzing, and interpreting data on a particular market, industry, or target audience is known as market research. To make wise business decisions, it is necessary to research a number of variables that affect consumer behaviour, market trends, and competitive environments. Insights from market research help organizations create successful marketing plans, bring successful products to market, and stay one step ahead of the competition. Market research offers insightful information on customer preferences, market demand, and opportunities. The primary objectives of market research include:

1. **Understanding Customer Needs and Preferences:** Businesses can better understand their target customers' interests, purchasing patterns, and pain concerns by conducting market research. Using this information, businesses may efficiently modify their services, goods, and marketing initiatives to match client expectations.
2. **Identifying Market Opportunities:** Businesses can find unmet requirements, new trends, and untapped market niches by performing rigorous market research. With the use of this knowledge, businesses can take advantage of possibilities to create cutting-edge goods or services that meet particular customer needs.
3. **Assessing Market Viability and Potential:** Market research helps evaluate the feasibility and potential success of a product or service in the marketplace. It provides insights into market size, growth rates, market saturation, and competitive

dynamics, helping businesses make informed decisions about market entry, expansion, or diversification.

4. **Monitoring Competitors:** Understanding the competitive landscape is essential for businesses to differentiate themselves and develop effective strategies. Market research enables companies to analyze their competitors' strengths, weaknesses, pricing strategies, marketing tactics, and product offerings, allowing them to position themselves advantageously in the market.
5. **Evaluating Marketing Effectiveness:** Market research helps assess the effectiveness of marketing campaigns, advertising efforts, and promotional activities. By collecting and analyzing data on brand awareness, customer satisfaction, and purchase intent, businesses can measure the impact of their marketing initiatives and make necessary adjustments to optimize results.

Market research methods can vary, including both qualitative and quantitative techniques. Qualitative research involves gathering insights through techniques such as interviews, focus groups, and observations, providing a deeper understanding of consumer motivations and perceptions. Quantitative research, on the other hand, involves collecting numerical data through surveys, questionnaires, and statistical analysis to measure market trends, customer preferences, and other quantifiable metrics.

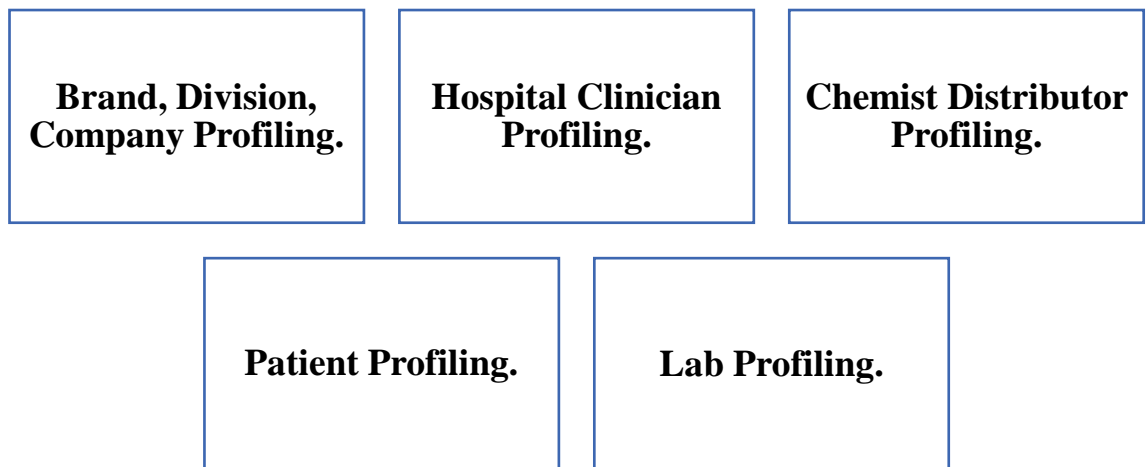
In summary, market research is a vital tool for businesses to gather actionable information about markets, customers, and competitors. By leveraging the insights gained through market research, companies can make well-informed decisions, minimize risks, and maximize their chances of success in a dynamic and competitive business environment.

1. DISSERTATION TRAINING

1.1 Introduction

Established in 2015, Cognitrex consultants is a market research, market intelligence, competitive intelligence and consulting company with substantial presence in healthcare domain which includes pharmaceuticals, medical devices, medical equipment, consumables etc.

- **Market and Competitive Intelligence** - Market and competitive intelligence are critical components of business strategy and decision-making processes. They involve gathering and analysing information about the market, industry trends, customer preferences, and competitors to gain a competitive advantage and make informed business decisions. Market and competitive intelligence comprise of: -



- **Market Sizing and Opportunity Assessment** - Market and competitive intelligence are critical components of business strategy and decision-making processes. They involve gathering and analysing information about the market, industry trends, customer preferences, and competitors to gain a competitive advantage and make informed business decisions.

Benefits of Market and Competitive Intelligence:

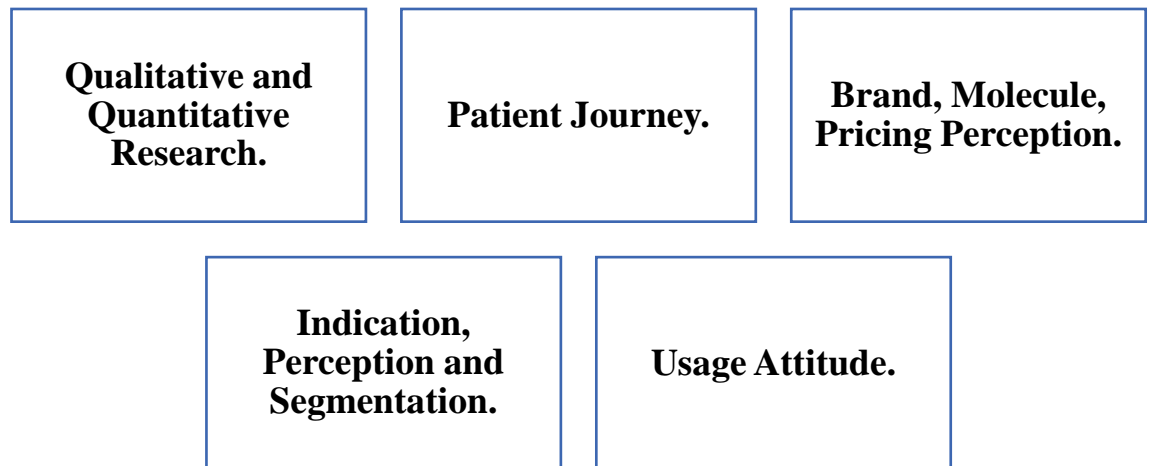
- Identifying new market opportunities and target segments.
- Understanding customer preferences and behaviour.
- Mitigating risks by identifying potential threats and challenges.
- Developing effective marketing and sales strategies.
- Improving product development and innovation.
- Enhancing competitive positioning and differentiation.
- Anticipating competitor actions and staying ahead in the market.

Market Sizing and Opportunity Assessment comprises of: -

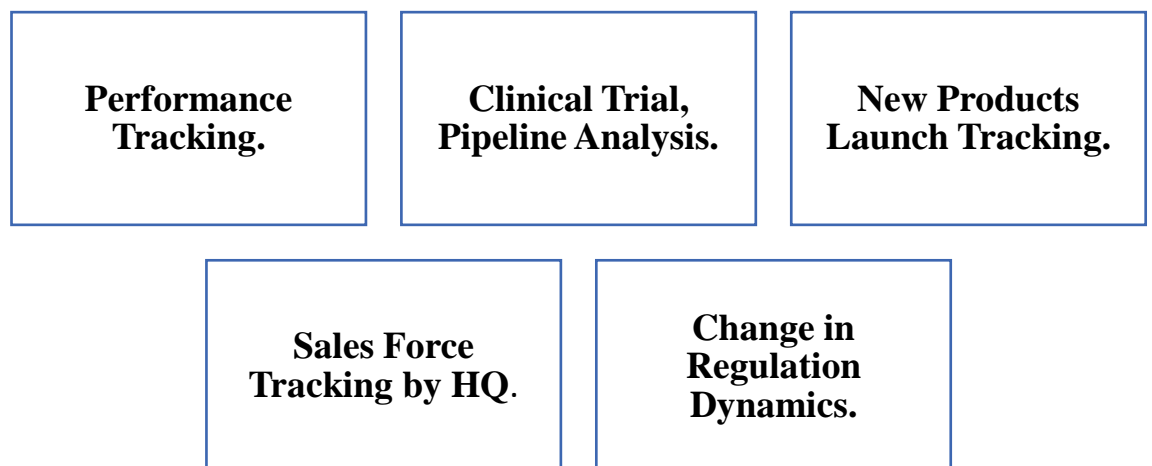


- **Clinician Perception** - Clinician perception refers to the subjective views, beliefs, attitudes, and opinions held by healthcare professionals, such as physicians, nurses, therapists, and other medical practitioners. It encompasses how clinicians perceive various aspects of their work, including patients, treatments, healthcare systems, and professional practices. Clinician perception plays a significant role in shaping clinical decision-making, patient care, and the overall healthcare landscape.

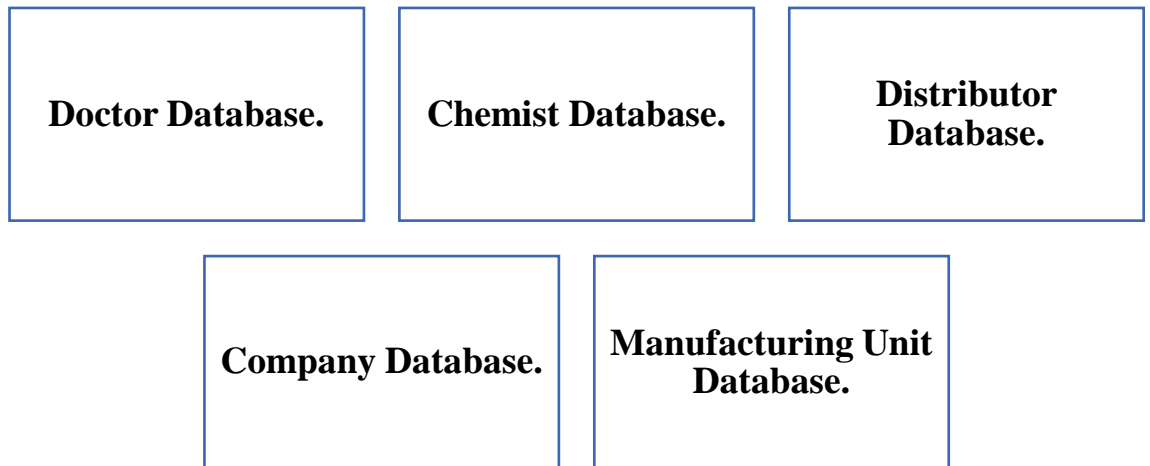
Clinician Perception Study comprises of: -



- **Tracking** - Tracking in the pharmaceutical industry refers to the process of monitoring and tracing pharmaceutical products throughout their lifecycle, from manufacturing to distribution and patient use. It involves recording and maintaining comprehensive information about the movement, location, and status of pharmaceutical products to ensure their quality, safety, and integrity.



- **Database Management** - Database management of doctors, distributors, and chemists in the pharmaceutical industry is crucial for effective communication, relationship management, and targeted marketing efforts. It involves creating and maintaining organized and up-to-date databases containing comprehensive information about these key stakeholders.



2. DISSERTATION REPORT

2.2.1 Introduction

Market assessments in the pharmaceutical industry are crucial for evaluating the potential of a particular product or therapy, identifying market opportunities, and making informed business decisions. Here are some key components and considerations involved in a market assessment within the pharma industry:

Market Size and Growth: Assess the overall market size, both in terms of revenue and patient population, for the specific therapeutic area or disease indication. Analyze historical data and forecast future growth trends, considering factors such as patient demographics, epidemiology, and healthcare spending.

Competitive Landscape: Identify and evaluate existing competitors operating in the target market. Analyze their market share, product portfolios, pricing strategies, and market positioning. Assess the strengths and weaknesses of each competitor to understand the competitive dynamics.

Unmet Needs: Determine the unmet medical needs within the target market. Identify gaps in the current treatment options and assess the potential for new products or therapies to address those needs. Understanding patient preferences, treatment challenges, and healthcare provider perspectives is crucial in this assessment.

Regulatory Environment: Evaluate the regulatory landscape, including approval processes, intellectual property protection, and any potential barriers to entry.

Understand the requirements for clinical trials, safety regulations, and the potential impact of regulatory changes on market access and product development.

Pricing and Reimbursement: Assess the pricing and reimbursement landscape in the target market. Evaluate the pricing strategies of existing therapies and consider how payers and reimbursement agencies perceive the value of new products. Understand the potential challenges and opportunities related to pricing negotiations, health technology assessments, and access to reimbursement.

Market Segmentation: Divide the target market into relevant segments based on factors such as disease severity, patient characteristics, and treatment preferences. Analyze each segment's size, growth potential, and specific needs to identify the most attractive target segments for your product or therapy.

Market Entry Strategy: Develop a comprehensive market entry strategy based on the assessment findings. Determine the optimal positioning for your product or therapy, taking into account competitive advantages, differentiation factors, and potential partnerships or collaborations.

Market Trends and Future Outlook: Identify emerging trends, technological advancements, and shifts in treatment paradigms that may impact the target market. Consider the potential impact of digital health solutions, personalized medicine, or other disruptive factors on market dynamics.

Stakeholder Analysis: Identify key stakeholders within the target market, including healthcare professionals, patient advocacy groups, regulatory bodies, and payers. Understand their perspectives, interests, and potential influence on market adoption and product uptake.

Financial Projections: Based on the market assessment, develop financial projections that include revenue forecasts, pricing assumptions, market penetration rates, and expected return on investment. This will help evaluate the commercial viability and potential profitability of the product or therapy.

Remember that market assessments should be conducted using reliable data sources, market research techniques, and insights from subject matter experts. It's also essential to regularly update and reassess the market landscape as new information becomes available.

2.2.2 Literature Review

With more than 60000 brands competing for a share of the lucrative 36.5-billion-dollar market, India's pharmaceutical industry is now oversaturated and fiercely competitive. Just 300 products represent more than 45% of overall sales among this confusing array of 60000 weird brands. In the study, several brand names and the way these bands interact with doctors are explored. Primary information is acquired by interacting with product managers and marketing experts of major pharmaceutical companies in Hyderabad as well as some information from doctors in Vijayawada. Secondary information is gathered by consulting with numerous publications and websites. All brand managers ensure that the information about their products—such as the chemical name, dose, medication class, therapy, or use—is communicated to the doctor in the product names. What precisely does a name mean? Someone once said that all there is is a name. The brand name speaks for itself in the current "me too" culture. The name of a product is an essential tool for navigating the confusion and unpredictability of the market, where there seem to be an increasing number of brands. In the case of prescription medications, the doctor is the real customer and the patient is the consumer because the sale of the medication is only inflated by doctor prescriptions. Each day, at least 10 to 12 medical reps visit with the doctor and pitch at least 5 goods. The doctors are unable to remember the brand name, dosage schedule, ingredients, and class of drug molecules. That's why brand communication will place a vital role in remembering the brand by doctors. ⁽¹⁾

2.2.3 Objectives

Primary Objective:

- To Study the Competitive & Strategic Assessment of Sun Pharma - Pharma Division.

Secondary Objective:

- To find out the perception of ex – employees of sales team about the sales (2021-2022)
- To identify resource; team structure – Sales and Marketing
- To identify the clinician focus; specialties targeted
- To determine strategy on segmentation, positioning and targeting brand
- To find out the Tactics of Promotion

2.2.4 Methodology

Study location: Cognitrex Consultants Pvt. Ltd.

Study Design - Study is Retrospective in nature.

Selection Criteria –

Inclusion Criteria - Include all the Ex-Sales Force People, Distributors, Channel partners who are promoting the brands of Pharma division of Sun Pharma.

Exclusion Criteria - Present sales force people currently serving in sun pharma

Sampling Technique – Convenience Sampling

Sample size – Sample size is of 12. Sample size was selected as per the company SOP's.

Technique of Collection – In-Depth Interview

Study Method and Tool to be used –

1. Primary Data – In-depth interviews were conducted to collect the data.

2. Secondary Data – Checklist were used to collect information about conferences, CMEs and other promotional activities.

Study Tool - Checklist method used to collect information about conferences, CMEs and other promotional activities.

Study Analysis: Microsoft Excel

Name of Conference	
Date of Activity	
Venue	
Specialty Focused	
Brand Focused	
Organized By	

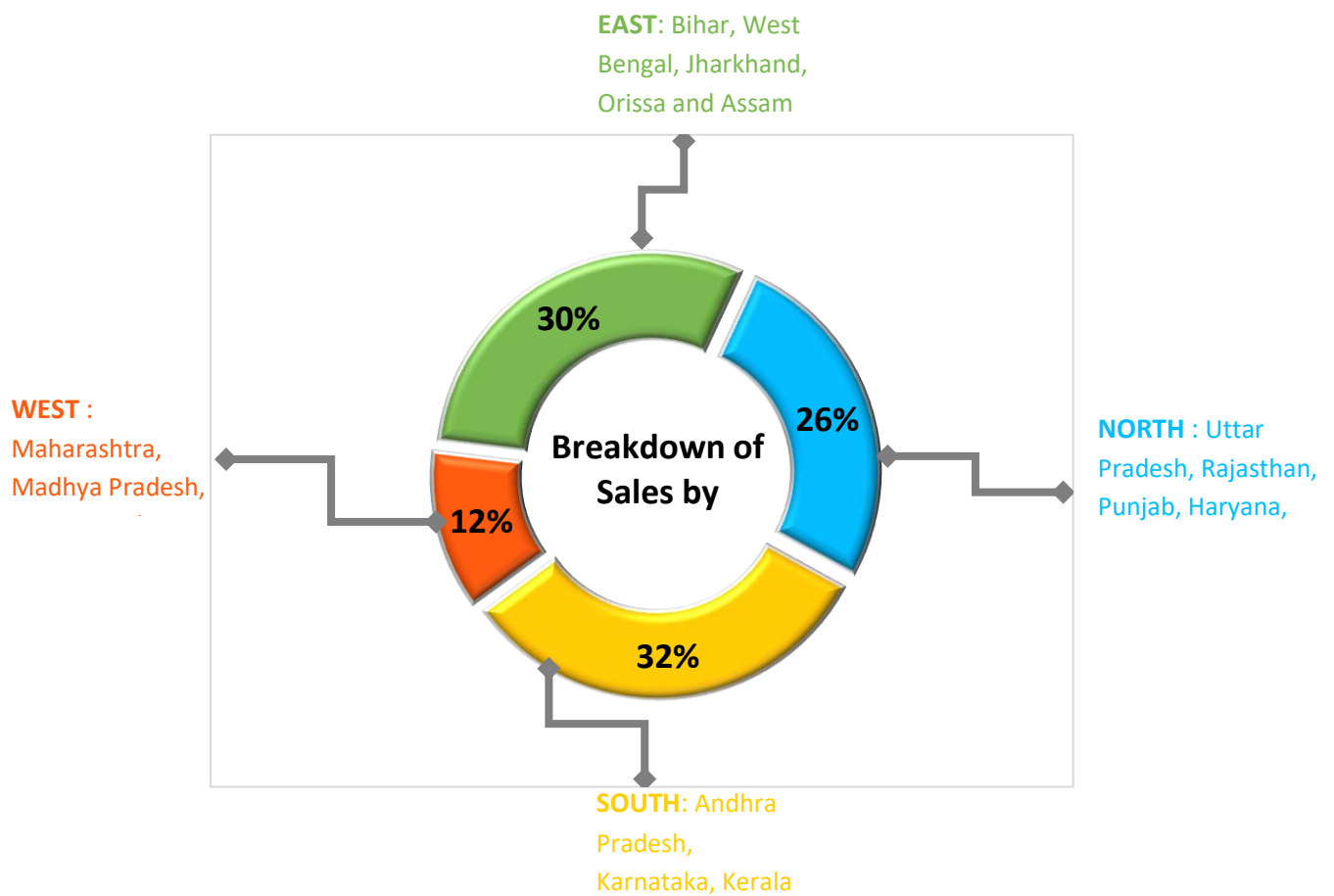
Figure 2.4.1. Checklist for the study

2.2.5 Results

1. Sales Assessment

After conducting interviews and analyzing the data, it was found out that,

- Southern India contributes to 32% of the total sales which is the maximum sales in the region.
- Followed by Eastern India which contributes to 30% of the total sales.
- Northern India contributes to 26% followed by Western India which contributes 12% of the total sales.



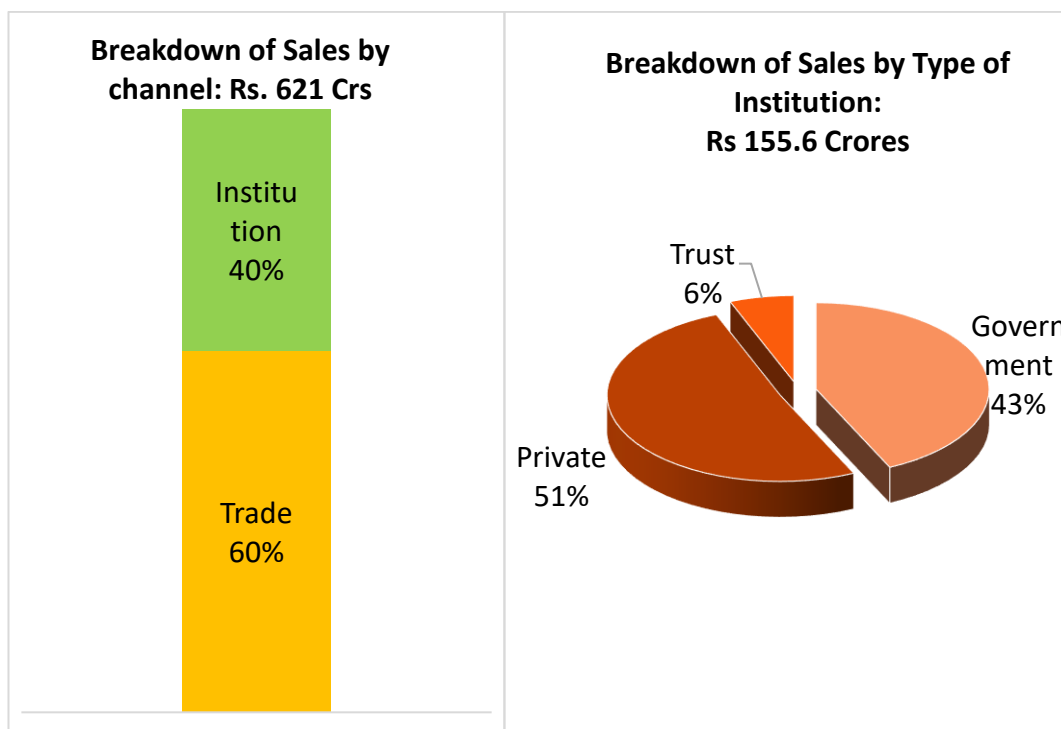


Figure 2.1.1.

Figure 2.1.2.

- In Figure – 2.1.1

The total sales business was broken into trade and institution in which: -

- Trade contributes the highest percentage of sales business i.e., 60%.
- Whereas institution contributes to 40% of the total sales business.

- In Figure – 2.1.2

Total sales business by institution was broken into contribution sales by the different institution in which: -

- Highest contribution was by the private sector which contributed about 51%.
- Government sector contributes about 43% in institution sales.
- Trust's contribution was significantly low about 6% of the institution sales.

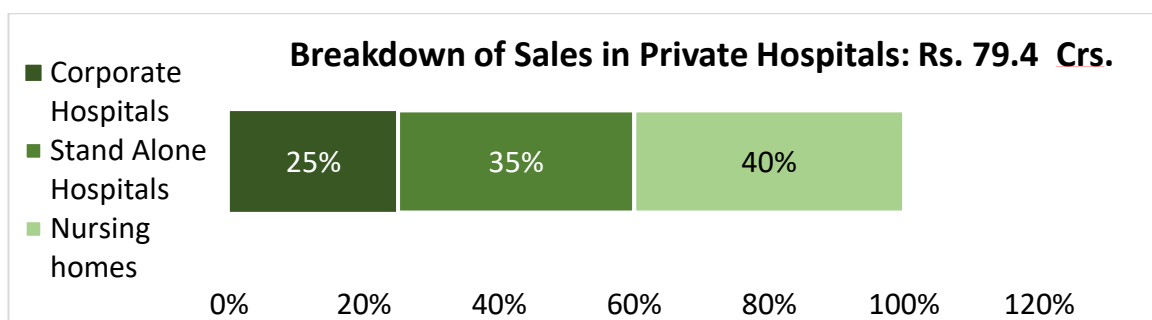


Figure 2.1.3.

Breakdown of sales in private sector is represented in which: -

- Nursing Homes has been the highest contributor for Pharma brands contributing 40% of the overall sales among the private sector.
- Followed by Stand alone Hospitals which contributes about 35% of the overall sales among the private sector.
- Corporate hospitals contributes only 25% of the overall sales among the private sector.

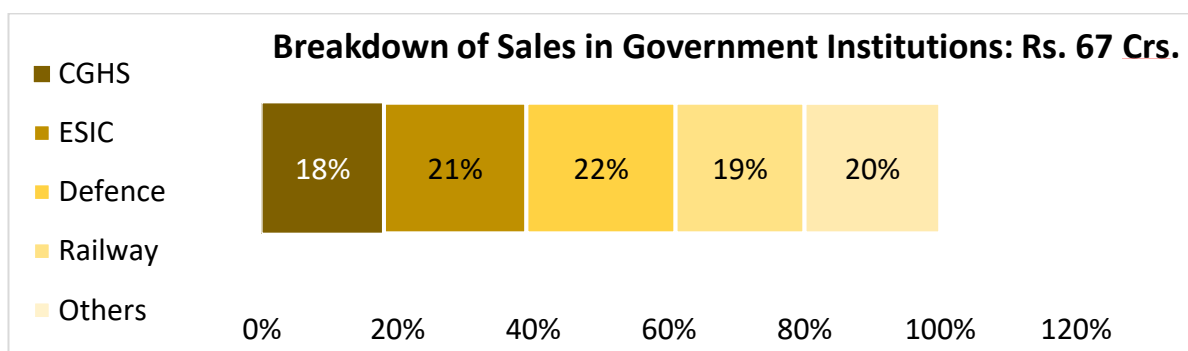


Figure 2.1.4.

Breakdown of sales in government sector is represented in which: -

- ESIC and Defense are the highest contributors with 21% and 22% each of the overall sales among the government sector.
- Followed by Railwaay which contributes about 19% and CGHS with 18% of the overall sales among the government sector.

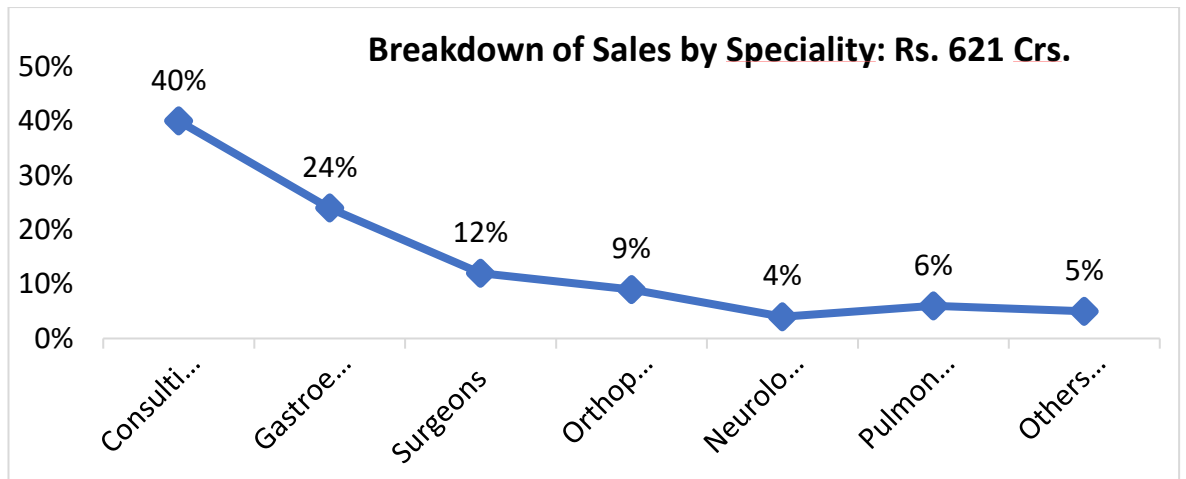


Figure 2.1.5.

This chart represents the contribution in sales by doctors of different specialties to which the brands in pharma division are majorly promoted: -

- Consulting Physicians and General Physicians contributes 40% of the total sales of division followed by Gastroenterologists which contributes 24% of the total sales of the division.
- Whereas, Surgeons, Orthopaedics, Neurologists, Pulmonologists contributed to 12%, 9%, 4%, 6%, respectively of the total sales of the division.

2. Sales Structure of Division

- The Sales force structure of division is placed below:
 - National Sales Managers: 1
 - Zonal Sales Manager: 7
 - Regional Sales Manager: 24
 - Field Sales Manager/Area manager: 85
 - Sales Officers/Territory Sales Executive/Territory Sales manager: 385

Region	Numbers	Sales in Crs.	YPM (In Lakhs)
North	92	161.5	14.63
South	102	198.7	16.24
West	79	74.5	7.86
East	112	186.3	13.86
Total	385	621	13.44

Figure 2.2.1.

Number of sales person and sales business of pharma division was captured region wise and YPM was calculated.

YPM refers to Yield Per Month which is calculated as: -

$$\text{YPM} = \{\text{Sales in Crs}/\text{Number of sales person}\}/12$$

3. Doctor Coverage and Brand Positioning

Specialists	Category (no. of clinicians)			Total
	Super Core	Core	VIP	
Consulting Physician & GPs	5	30	35	70
Gastroenterologists	10	-	-	10
Surgeons	5	10	5	20
Orthopaedics	-	10	10	20
Neurologists	-	10	-	10
Pulmonologists/Chest Phys	-	10	5	15
Others (Cardio, Diabeto, Nephro)	-	10	5	15
Total	20	80	60	160

Figure 2.3.1.

- Above table represents the doctors of different specialities covered for the promotion and number of visits provided to the doctors on the basis of business they provide and their patient base.
- Visit pattern has been segregated into 3 categories: -
 - Super Core – Each doctor is provided 3 visits in a month.
 - Core - Each doctor is provided 2 visits in a month.
 - VIP - Each doctor is provided 1 visit in a month.
- Each of the sales executive covers a doctor list of 160 doctors based on the territory coverage in which: -
 - Super core category includes 20 doctors.
 - Core category includes 80 doctors.
 - And, VIP category includes 60 doctors.

4. Tactics of promotion.

Tactics of promotion includes the various strategies or activities conducted by the organization to increase the sales of their key brands.

These activities can be; -

- Providing clinicians academic and promotional inputs.
- Participation in the Conferences
- Organising camps according to the specialities of the doctors targeted.

4.1 Academic and promotional inputs

- For academic and promotional purposes various journal reprints, case studies, product monographs, books are provided to clinicians on quarterly basis or upon their request.
- Brand reminders and LBL's (leave behind literature) is also provided to the clinicians for the promotion of their key brands.

Inputs	Quarterly		
	Units	Name	Specialties Targeted
Journal Reprints	20	Journal of American College of Gastroenterology	Gastroenterologists and CPs
	20	Journal of American Orthopaedic Society for Sports Medicine	Orthopaedics
	20	Journal of American College of Surgeons	Gen. Surgeons
Case Studies	20	Endorsed by KOLs	Gastroenterologists and CPs
Product Monograph	50	Nusam	Gastroenterologists and CPs
HEP to DATE	10	Hep to Date	Gastroenterologists
Book	2	AO Principles of Fracture Management	Orthopaedics

Figure 2.4.1.

4.2 Participation in the Conferences

- Sun Pharma participates in various annual conferences for the promotion of their products.
- Pharma companies set up exhibition booths at conferences to showcase their products, services, and innovations. These booths allow them to engage with attendees, demonstrate their offerings, and provide educational materials. It's an opportunity for companies to interact with healthcare professionals, researchers, and potential business partners.
- Pharmaceutical companies often serve as sponsors for conferences. They provide financial support, which helps cover the costs of organizing the event. In return, sponsors receive various benefits such as prominent brand visibility, logo placement, exhibition space, and recognition in conference materials.
- Representatives from pharmaceutical companies may be invited to speak at conferences. They can deliver presentations on topics related to their company's research, drug development, clinical trials, or therapeutic areas of focus. These presentations allow companies to share their expertise, insights, and advancements with the conference audience.
- Conferences often include networking sessions, receptions, or social events where participants can interact and build connections. Pharma companies use these opportunities to network with key opinion leaders, researchers, healthcare providers, regulatory authorities, and potential collaborators. Such interactions can lead to partnerships, collaborations, or business opportunities.
- Overall participation in conferences allows pharma companies to establish their presence, network with industry professionals, promote their products, exchange knowledge, and stay updated with the latest advancements in the field.

4.2.1 ISGCON 2023 was held at Jaipur, Rajasthan and further details of the conference is mentioned in the table below:

Name of Conference	Annual conference of the Indian Society of Gastroenterology (ISGCON)
Date of Activity	5 th – 8 th January, 2023
Venue	Jaipur, Rajasthan
Specialty Focused	Gastroenterologist, GPs, CPs
Brand Focused	Division Focused
Organized By	Indian Society of Gastroenterology

4.2.2 IOACON 2022 was held at Guru Nanak Dev University, Amritsar and further details of the conference is mentioned in the table below:

Name of Conference	Annual Conference of The Indian Orthopedic Association (IOACON 2022)
Date of Activity	28 TH Nov – 3 rd Dec, 2022
Venue	Guru Nanak Dev University, Amritsar
Specialty Focused	Gastroenterologist, GPs, CPs
Brand Focused	Division Focused
Organized By	The Indian Orthopedic Association

4.3 Camps

- Pharmaceutical companies occasionally organize camps for doctors to enhance and provide benefits of the services to the patients as a part of their marketing and educational initiatives. These camps serve various purposes, such as medical education, product promotion, and relationship building. Here are some different types of camps organized by sun pharma for doctors: -

Name of Camp	Objective of the Camp
4 for Sure	The objective of this campaign is to make the clinicians aware about Sompraz being responsible for achieving intragastric pH > 4 for sure. This campaign is carried out by distributing LBLs to the clinicians and discuss about pH upon every visit.
Uric Acid Camps	Every month 50 strips/ SO for uric acid detection are sent to Front line managers. Each SO is required to carry out 2 Uric acid camps in a month. 25 patients in each camp are presented by immediate uric acid report and what to do and not to do paper chits are provided in conditions, if their reports are found out to be higher than normal parameters.
OPD Camps	In this activity, SO visits the clinician in morning just before starting OPD and present him with Juice bottle and reminder for his key brands and demands for 5 rxns at least and sits outside/inside OPD for 2-3 hours and thank the doctor for their support.

2.2.6 Discussion

After evaluating the above data and verifying the results, it is seen that,

- Sun Pharma – Pharma Division has strong footprint in the gastro segment having diverse portfolio and range of different therapeutic products.
- Sun Pharma has an existing good prescriber base in metro cities and gradually increasing prescriber base in tier 1 and tier 2 cities.
- Following points were identified after the study; -
- **Sales of the division:** Rs 621 Crs.
- **Marketing and Promotion Spent for the division:** Rs. 58 Crs.
- **Name of the division:** Pharma Division
- **Sales Team** (394)
 - **National Sales Manager** (1)
 - **Zonal Sales Manager** (7)
 - **Regional Sales Manager** (24)
 - **First Line Manager** (85)
 - **Sales Officer** (385)
- **Marketing Team:**
 - **Marketing Head** (1)
 - **Product Managers** (4)
- **Distribution network:**
 - **CFAs:** 25
 - **Distributors/stockists:** 2,100

SWOT Analysis

- **Strengths** – 1. Sun Pharma – Pharma Division has strong footprint in the gastro segment.
2. Diverse product portfolio with a range of gastro drugs.
- **Weakness** – 1. Stiff Competition from Competitors Brands.
2. Differentiate Brand from another Branded generics & innovator's molecule.
- **Opportunities** – 1. Establish the different brands in Teir-1 & Teir-2 areas that are untapped by Innovator & would become drivers of growth.
2. Sun Pharma has an existing good prescriber base of which can be utilized for increasing the sale of other brands in the division.
- **Threats** – 1. Intense competition from other large and well-established players in the industry
2. Rapidly changing therapy landscape and evolving customer preferences.
3. Increasing regulations and compliance requirements in the industry.
- **Limitations:**
 - Data points were collected from the ex-employees of the sales team.
 - Sample size was low as specified by the norms of the organization for collection of the data points.

2.2.7 Conclusion

The Sun Pharma – Pharma Division's market assessment report offers a thorough examination of the pharmaceutical industry and the company's place within it. The following important conclusions have been drawn after a thorough assessment of market dynamics and competitive environment:

Market Potential: The pharmaceutical industry has a promising future thanks to reasons like rising healthcare costs, an ageing population, and an increase in the prevalence of chronic diseases. This offers sun pharma numerous options to increase its market share and market visibility.

Competitive Landscape: The pharmaceutical industry is very competitive, with both established organizations and newcomers to the market sun pharma must take a proactive and strategic approach to differentiate its offerings and keep a competitive edge in the face of both direct and indirect competition. Continuous innovation and close observation of competition activity will be necessary.

Product Portfolio: The product portfolio of sun pharma has both strengths and weaknesses, as demonstrated by the analysis. The organization can target various market groups because of its wide variety of products across several therapeutic areas. However, there is space to expand into neglected therapeutic areas, create new products, or engage in strategic alliances to improve the portfolio.

In conclusion, the market assessment research highlights both the market's considerable possibilities and constraints. By building on its strengths, filling in the gaps where it needs to improve, and implementing customer-centric strategies, sun pharma is well-positioned to take advantage of these opportunities. Sun pharma may strengthen its competitive position and achieve sustainable growth in the changing pharmaceutical

landscape by remaining responsive to market dynamics, embracing innovation, and establishing strategic collaborations.

2.3 Supplementary

2.3.1 Instrumentation – Questionnaire.

Name of the Division :

Name of the respondent :

Designation :

Location :

Total year of experience :

Association with the company:

Sales and Portfolio detail

- Could you please advise us which are the division that is responsible for severe asthma product promotions in India?
 - What are the key brands?
- Which are the other products that are promoted by the division?

Brand	Molecule	Strength	Packaging	MRP, Rs	PTR, Rs	PTS, Rs

- What is the sales of the division in India/region (Both value and volume)?
 - 2021 - 2022: Rs ___CRs
- How the Sales of the Division Sales broken down by various regions and which are the key states?

Regions	% Contribution to region	Key States
South		
North		
West		
East		
Total		

- What is the total list of doctors and specialties that each of the sales executive covers? How various brands are positioned in order of priority for promotion? What the daily call average is of doctors that each of the sales executives follow? Is there any category of doctors that are defined and how the categorization is made and how each of the category of doctors are visited in a month?

- Daily Call Average: __
- Category of doctors and their visit pattern:

Category	No. of visits/month	Definition
Class 1	3	Having business potential of more than Rs xx Lakhs in a month for diabetic products and with a patient footfall of xx per month
Class 2	2	
Class 3	1	

- Doctor coverage by each of the sales executives:

Specialties	Category (no. of clinicians)				Order of priority during promotion/detailing (As 1 st /2 nd /3 rd /4 th /5 th)
	Class 1	Class 2	Class 3	Total	
Specialist 1					
Specialist 2					
Specialist 3					
Specialist 4					
Specialist 5					
Specialist 6					
Specialist 7					
Specialist 8					
Specialist 9					
Total					

- Breakdown of sales by specialties?

	% contribution to total sales

	100%

Sales Structure of the Team

- How the sales structure looks like for the division? How the YPM looks like by each region and split of sales force in each region?

2.3.2 Bibliography

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