



COVID-19 Crisis – Impact on Pharmaceutical Field Forces and Digital / Multi Channel Strategies

Online questionnaire– 63 pharmaceutical companies (GMs, Sales Heads, BU Heads) – D/A/CH – May 2020

Key Messages:

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|--|---|
| <p>1 Physician channel preference will change and they are expected to determine time of interaction</p> <p>7/10 </p> | <p>... but majority of respondents' state, they have no respective Segmentation & Targeting in place</p> <p>5/10 </p> |
| <p>2 New ways (digital) are being established, even stronger focus & execution required than today</p> <p>8/10 </p> | <p>... but ability to measure impact of digital activities is still low</p> <p>4/10 </p> |
| <p>3 There is consent, that usage of digital will grow significantly</p> <p>8/10 </p> | <p>... but there is a wide spread of expectations of field force size from shrinking to low impact</p> <p>5/10 </p> |
| <p>4 There is very limited expectation, that a few months after the crisis M&S will return to “old normal”</p> <p>4/10 </p> | <p>... and healthcare systems as such will change significantly</p> <p>7/10 </p> |
| <p>5 The picture of existing digital / multi-channel strategies is scattered, averaging on mid levels</p> <p>7/10 </p> | <p>... but existing reporting / advanced analytics capabilities are lacking behind, wide spread</p> <p>5/10 </p> |
| <p>6 Somewhat surprisingly, product availability has been named as the key topic in physician interaction</p> <p>7/10 </p> | <p>... despite the majority claiming to have particular content for digital available</p> <p>6/10 </p> |
| <p>7 Classic telephone and email are the favorite interaction tools, and the fax is still not dead</p> <p>8/10 </p> | <p>... but despite the fax still being around, there is quiet an optimism for opportunities ahead</p> <p>8/10 </p> |

1= do not agree – 10 fully agree



Detailed report is available upon request.
Please contact us:

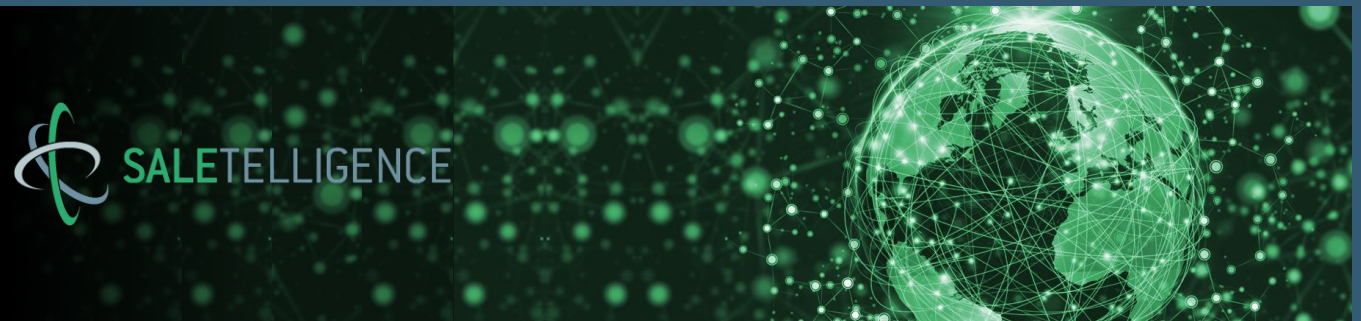
MundiCare | Healthcare Solutions



MundiCare GmbH
Zenettstraße 2, 80337 Munich
Germany

Tel.: +49 89 381 567 412
Fax: +49 89 381 567419
Mobile: +49 15158800080

Bjoern.komischke@mundicare.de
www.mundicare.de



SALETELLIGENCE GmbH
Meisenstraße 96, 33607 Bielefeld
Germany

Tel.: +49 521 2997 403
Fax: +49 521 2997 408

martin.walter@saletelligence.com
www.saletelligence.com