Abstract of the Thesis entitled:

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(Under Faculty of Management)

Research Center:
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1. INTRODUCTION:

The pharmaceutical industry is very aptly described as a “life-line industry.” It plays a vital role in alleviating the sufferings of millions of people in the world and controlling various ailments that afflict human beings. Recognizing this, pharma industry is included in the core sector of many countries.

1.1 Global Pharma Market Present Status: The global pharma market revenue audited by IMS, health, MAT Dec 2013 was pegged at $863.2 billion with 4.5% growth rate. USA ($332 billion) topped the global pharma market followed by Japan ($82 billion) and China ($58.3 billion). From world pharma market only China (13.8), Brazil (16.8), Venezuela (24.9) & India (10) recorded double digit growth rates; rest of the markets grew at single digit growth rates. France, Australia, South Korea, Belgium & Switzerland showed negative growth rates.

1.2 Top Global Pharma Companies: Novartis continued to remain the top ranked company with revenue of US$ 50.3 billion followed by Pfizer and Sanofi on 2nd and 3rd ranks in the global pharma market, MAT Dec 2013. J & J was the only company amongst the top10 with double digit (12.2) growth rates.

1.3 Indian Pharmaceutical Market - An Overview: The Indian pharmaceutical industry today is in the front rank of India’s science-based industries. The Indian pharmaceutical market has more than 20,000 registered units. It has expanded drastically in the last two decades. The leading 250 pharmaceutical companies control 70% of the market & the market leader is holding nearly 7% of the market share. It is an extremely fragmented market with severe price competition and government price control. The Indian pharma industry meets around 70% of the country's demand of different drug formulations. The Indian pharma market was valued at Rs.78,644 Cr. and grew at 10% for the period MAT Dec’13. The incremental value added by the IPM in last 12 months is Rs. 7,087 Cr.

1.4 Top Companies: The top 10 companies have registered a growth rate of 7%, which is lower than that of the IPM (10%). Abbott topped with Rs.5,245 Cr. turnover followed by Cipla at No. 2 position and Sun Pharma at No. 3 position. Among the top 10 companies, Sun Pharma, Alkem and Macleods Pharma stood out as the fastest growing companies, registering a growth of 18%, 15% and 15% respectively.

1.5 Top Brands: Corex with 310 Cr. turnover, was the market leader followed by Phensedyl Cough (289 Cr.) and Augmentin (263 Cr.), for the period MAT Dec 2013.

1.6 Top Therapeutic Areas: Anti-infectives remained the biggest segment contributing 15%, followed by Cardiac and Gastro Intestinal therapies, MAT Dec 2013. Anti-diabetic (19%) and Derma (18%) reflected the fastest growing segments for the period.
2. RATIONALE OF THE STUDY:
   i. The researcher has selected this topic for the research because he has already worked in pharma industry for more than nine years in the marketing and sales teams of three reputed pharma companies in Ahmednagar district. So he has closely observed and noticed various changes occurred in the marketing scenario of prescription-based medicines as well as in the promotional tools used by pharma companies, in the last decade. Therefore, he found it’s worthwhile to analyze and document these changes and come-out with some valuable suggestions helpful to the pharma industry for designing their future marketing strategies.
   ii. The researcher has also made an attempt to study the impact of changing marketing scenario on different stakeholders in Ahmednagar district like Doctors, Chemists, Stockists, Medical Representatives and Managers. It involved exploring the effects of changing marketing scenario in prescription-based medicines on these stakeholders. This will really help the pharma companies to make the necessary changes in their present and future marketing strategies for ensuring positive impacts on stakeholders and further, to improve their satisfaction levels too.
   iii. The researcher has also tried to ascertain the expectations of selected stakeholders in Ahmednagar district from pharmaceutical companies. This will be truly helpful to pharma companies to make the necessary changes in their present marketing strategies for ensuring better customer satisfaction.
   iv. Finally, the researcher made an effort to estimate the future marketing trends of prescription-based medicines anticipated by the stakeholders as well as by pharma industry experts, for designing their future goals and strategic plans accordingly.

3. OBJECTIVES OF THE STUDY:
   1. To analyze the changes in marketing scenario of prescription-based medicines in the last decade in Ahmednagar district.
   2. To study the impact of changing marketing scenario in prescription-based medicines on stakeholders in Ahmednagar district.
   3. To know the expectations of stakeholders in Ahmednagar district from pharmaceutical companies marketing prescription-based medicines.
   4. To predict the future marketing trends of pharmaceutical companies marketing prescription-based medicines.

4. HYPOTHESES:
   1. Stakeholders in Ahmednagar district are not satisfied with the changing marketing trends in prescription-based medicines.
2. The changing marketing scenario in prescription-based medicines has adversely affected the prescription habits of Doctors in Ahmednagar district.

3. Chemists and Stockists are not satisfied with the trade-margins and promotional schemes offered by pharmaceutical companies.

5. RESEARCH METHODOLOGY:

A. Research Design: The research design constitutes the blueprint for the collection, measurement and analysis of data. The research design employed for this study was descriptive as well as exploratory research type.

B. Data Collection: The data was collected through following sources –

i) Primary Data: The primary data has been collected from following stakeholders having at least ten years of experience from Ahmednagar district using personal interviews with the help of four structured Questionnaires from: 1. Allopathic Practicing Doctors, 2. Chemists, 3. Stockists and 4. Medical Representatives & Managers.

ii) Secondary Data: Secondary data was collected from –

a) Journals of Marketing Management and Commerce,

b) Magazines like Pharma Bizz, Express Pharma Pulse, Pharma Chronicle, etc.,

c) Newspapers like Economic Times, Business Standard & other local papers,

d) Pharmaceutical Marketing, Marketing Management & Research books, etc.,

e) Internet websites related to pharma industry, Govt. of India websites, etc.,

f) Ph.D. Thesis related to pharmaceutical marketing, etc.

C. Sampling Techniques: The respondents were selected by Simple Random and Purposive Sampling Method from Ahmednagar District as given below- i) Doctors-190, ii) Chemists-95, iii) Stockists-30, iv) M.R.’s and Managers-95. **Total Sample Size is - 410.**

D. Research Instrument: The data collection was done through personal interviews and schedules from selected stakeholders using four different structured and pre-coded questionnaires prepared for- i) Doctors, ii) Chemists, iii) Stockists and iv) Medical Representatives & Managers.

E. Data Analysis: Before conducting data analysis, data preparation was done using editing & coding. Close-ended responses were first coded and quantified; then all of the responses were tabulated and analyzed. After systematic analysis, interpretations were written down. Then different open ended responses were also studied and analyzed for each objective. For the analysis and interpretation of data following tools and methods are used:

- Coding, Tabulation, Classification, Percentage and Average and Graphs / Pie-charts.
- The responses of open ended questions were categorized in to groups & then analyzed.
F. Scope of the Study:
1. The scope of the study is restricted to the topic entitled “An Analytical Study of Changing Marketing Scenario in Prescription-based Medicines & its impact on Stakeholders in Ahmednagar District. (2001-2010)”
2. The research was conducted in Ahmednagar district therefore the scope of the study and the conclusions & recommendations of the study are restricted to Ahmednagar district in Maharashtra only.
3. The researcher has selected only limited stakeholders like Doctors, Chemists, Stockists, Medical Representatives and Managers. Therefore the scope is limited to these stakeholders only.
4. The researcher has focused very specific aspects of pharma marketing like analysing the changes, understanding its impact on stakeholders, understanding expectations of stakeholders and ascertaining future marketing trends in prescription-based medicines.
5. The scope of the study is restricted to study of changing marketing scenario of prescription-based medicines only, other type of medicines like Over the Counter medicines, are not considered for this study.

G. Limitations of the Study:
1. The research study is limited to the selected Stakeholders like Doctors, Chemists, Stockists, Medical Representatives and Managers in Ahmednagar District. Other Stakeholders like Shareholders, Business Partners and Patients are not selected for this study. Hence results may or may not vary with change in stakeholders, their sample size as well as change in the research area.
2. The study was done for the selected time period of last decade and was completed in the stipulated time. Therefore limited time and time-frame are other limitations of study.
3. Sometimes because of business confidentiality or other issues, some stakeholders might not have disclosed the real information. Therefore the conclusions are based upon the information provided by the respondents.
4. Some other limitations includes refusal of some respondents to participate in the study, non-cooperation in providing required information and giving biased or misleading information. Even though researcher has taken utmost care in collecting the genuine data required for the research but he might have fall short somewhere due to lack of expertise in conducting such researches.
5. Hence, selected stakeholders, specific research area, limited sample size, limited time & time-frame and secrecy are the major limitations of this study.
6. LITERATURE REVIEW:

Certain researchers have studied various marketing trends in prescription-based medicines. Some of them have attempted to understand the impact of changing marketing scenario on stakeholders also. The review of some of these important literatures is given below-

- **Irfan Inamdar (2012)** in his research article on “Doctor’s expectations from pharma companies: which will influence their prescription behavior” has recommended 4 important factors to pharma companies for designing effective marketing strategies for prescription-based medicines- 1. Knowledge updating sponsorship, 2. Scientific information updates support, 3. Promotional inputs & 4. Reputation of company.

- **Thomas George (2010)**, in his article on “Gifts to doctors, scientific information and the credibility gap in the Medical Council of India” in the Indian Journal of Medical Ethics, has clearly mentioned that gifts from pharma companies adversely affects the prescription habits of Doctors. So, the new rule in India bans all gifts to Doctors above Rs.1000 value.

- **Shahu Ingole & Amol Dube (2010)**, in their exploratory study tried to find out how physician’s drug prescribing influences by the drug promotions done by medical representatives. The study revealed that the sales representatives of different Pharma companies are the commonest source of information and latest updates on drug developments. The information provided by the medical representatives is brief and can be considered for initial information. Doctors should further get it clarified with other reliable sources of information. 50% of the physicians said that the MR actually provides newer and latest updates on medicines which influence their prescriptions. Sales promotion and gifting strategy could compromise on physician’s decision-making while selecting a brand.

- **Taneja G. & Arora U. (2007)** in their paper, “Physicians’ perception towards promotional tools offered by pharmaceutical industry: A comparative practicing status-wise analysis,” have mentioned that physicians in private service given greater importance to various kinds of sponsorships like sponsorship for conferences, medical equipment & personal gifts whereas physicians in government service have given more importance to medicine samples & personality of Medical Reps. So they recommended that pharma companies should plan different promotional strategies for physicians based on their practicing status.

- **Nobhojit Roy (2007)**, in his research on ‘Drug Promotional Practices in Mumbai- A qualitative study, tried to investigate the alliance among the pharma companies, doctors, retailers & the medical representatives, whether favoring patient’s health conditions or unfavoring with the aim of only maximizing profits. The authors concluded that, there is an unethical alliance among the said group and unethical promotional activities are held in Mumbai, at the cost of patients.
R. K. Bansal and Sanjay Das (2005), in their research article emphasized on the unethical practices done by the medical practitioners through their communication with pharma companies. The authors concluded that, this is an open secret of accepting benefits from pharma companies and then prescribing brands of these companies. But if this comes to know to the patients, they may lose confidence in their doctors. But as the competition is increasing among pharma companies, these types of practices will go longer.

Verma S.K. (2004), in his article on "Physician-pharmaceutical industry interaction: changing dimensions and ethics," has highlighted one of the important points of give and take relationship. Social scientists describe that pharma industry follows the, "norm of reciprocity" i.e., the obligation to help those who have helped you, as one of the fundamental principle of human interactions. Pharma companies also rely on this principle by giving gifts to doctors in hope that they will prescribe their firm's product in return.

Allan S. Brett, Wyane Burr and Jamaluddin Moloo, (2003), in their research study tried to find out the views of physicians on gifts and sponsorship provided by pharma companies to physicians and the prescription pattern whether is ethically problematic and to compare the views of senior physicians and physicians in training. Most of them responded that the gifts are moderate to very problematic. Physicians found it more comfortable with the culture of personalized activities of gifts and sponsorship at the beginning of their career. Both faculty and resident physicians agreed that recreational gifts are more problematic than educational gifts. The company sponsored lectures favoring their products are considered to be more problematic than lectures not favoring discussion.

Dr. Seema Dande (2014) in her Ph.D. thesis entitled “Study on impact of advertising effectiveness and event management in ethical pharmaceutical marketing” concluded that-

i. Doctor’s prescription habits get affected by events and journal advertisements.

ii. Visual aid, Print detailers and Leave behind literatures (L.B.L.) used by Medical Representatives are the most effective promotional tools for ethical pharma marketing.

iii. Medical Rep’s are more effective for brand recall to Doctors than direct mailers.

iv. CME’s, Conferences & Branded gift utility items are more effective than print detailers.

v. E-detailing / Digital marketing can’t substitute the need of a Medical Reps in the future.

Khomba Singh (2012) in his article on ‘Drug Companies Gifts to Docs may end Soon’ in The Economic Times, mentioned that “The Dept. of Pharmaceuticals have finalized the Drug Marketing code for the pharma companies which aims to end the wide-spread practice of pharma companies giving gifts & incentives to Doctors to prescribe their medicines. It restricts companies from offering or promising gifts, pecuniary benefits of any kind, directly or indirectly, to physicians or suppliers.”
7. CHAPTER SCHEME:
The structure of the chapter scheme of the thesis is as follows-

   **Chapter 1: Introduction**
   This chapter introduces the subject matter and research area of the study. It gives an overview of the purpose and background of the study. It deals with the Introduction, Rationale of the study and Statements of the research problem.

   **Chapter 2: Research Methodology & Review of Literature**
   This chapter describes research objectives, hypotheses, scope, limitations & research methods applied in this research in order to collect and analyze data. The chapter also contains review of literature, which was done using data collected from marketing journals, pharma magazines and books, internet websites and thesis on pharma marketing, and newspapers, etc.

   **Chapter 3: Profile of Indian Pharmaceutical Market**
   This chapter is the description of the profile of Indian pharmaceutical market. It emphasizes on introduction to Indian pharma industry, its history & evolution, overview of top pharma companies, size and growth of Indian pharma sector, share of various segments of pharma industry, major Indian pharma players, current and future prospects, etc.

   **Chapter 4: Collection and Analysis of Research Data**
   The primary data was collected from stakeholders like Allopathic Doctors, Chemists, Stockists, Medical Representatives and Managers using personal interviews, with the help of four different structured Questionnaires.

   For the analysis and interpretation of data following tools and methods are used:
   - Tabulation, Classification, Percentage & Average methods and Graphs / Pie-charts.
   - The responses of open ended questions were categorized in to groups and then analyzed systematically, correlating with the objectives and the hypotheses.

   **Chapter 5: Conclusions and Recommendations**
   In this chapter, conclusions relevant to the objectives & hypotheses have been discussed on the basis of data analysis and interpretations done of the collected data and some expedient recommendations have also been mentioned.

   **Chapter 6: Appendices**
   1. **Appendix A.** Questionnaire for Doctors,
   2. **Appendix B.** Questionnaire for Chemists,
   3. **Appendix C.** Questionnaire for Stockists,
   4. **Appendix D.** Questionnaire for Medical Representatives and Managers
   5. **Appendix E.** Glossary
   6. **Appendix F.** Bibliography
8. CONCLUSIONS AND RECOMMENDATIONS:
The conclusions of this research study and the proposed recommendations for the improvements in future pharma marketing strategies are summarised hereafter:

8.1 Conclusions about hypothesis testing:

I. The first hypothesis for this study is “Stakeholders in Ahmednagar district are not satisfied with the changing marketing trends in prescription-based medicines.”

A. From data analysis of Stakeholder’s feedbacks, it is noted that totally, 88% Doctors, 83% Chemists, 90% Stockist and 94% MR’s and Managers are not satisfied with the changing marketing trends in prescription-based medicines.

Thus, it is concluded that majority of, i.e. overall 89% Stakeholders are not satisfied with the changing marketing trends in prescription-based medicines and only 9% are satisfied, whereas 2% are neutral. This proves that majority of Stakeholders are not satisfied with changing marketing trends in prescription-based medicines in the last decade.

B. Further, the Stakeholders have also mentioned some negative changes they have noticed in the pharma marketing of prescription-based medicines. These are as below:

i. Doctors: “Commercialization, Give & take dealings, unethical promotion & aggressive marketing by pharma companies have increased; propaganda marketing by local company is increased; irrational drug combinations are increased; MR quality is decreased”

ii. Chemists: “Competition has increased, Doctors malpractices have increased, Doctors attached Chemists have increased & only attached Chemists can survive and Doctor’s dispensing have also increased, propaganda marketing is increased, same drug molecules are available with many brand names; Inventory & expiry amount is increasing due to frequent launch of new products by all pharma companies”.

iii. Stockists: “Competition & Commercialization in pharma industry have increased; medicine prices are increasing, Difficult to increase turnover due to more number Stockists, Inventory amount has increased & profitability has decreased”

iv. MR’s & Managers- “Corruption, Cut-practice, sales pressure, overall work pressure & mental harassment have increased a lot, ethical & effort-based brand promotion is lost, no job satisfaction, propaganda marketing is increasing.”

Therefore from above data analyses, Hypothesis 01 is proved and accepted.

II. The 2nd hypothesis is “The changing marketing scenario in prescription-based medicines has adversely affected the prescription habits of Doctors in Ahmednagar district.”

A. From data analysis of Chemists and MR’s & Manager’s feedbacks, it is noticed that 85% Chemists and 100% MR’s & Managers have responded that changing marketing scenario in prescription-based medicines have adversely affected Doctor’s prescription habits.
Therefore, it is concluded that majority of, i.e. Overall 93% Chemists, MR’s & Managers have responded that changing marketing scenario in prescription-based medicines have *adversely affected Doctor’s prescription habits*. Only 3% of them have replied that it has been *favorably affected* and remaining 1% of them replied that there is *no impact* of changing marketing scenario on Doctor’s prescription habits, in the last decade.

**B.** Also from data analysis of open ended feedbacks of Doctors, Chemists, MR’s & Managers about negative changes in pharma marketing of prescription-based medicines following supporting feedbacks to this hypothesis were noticed:

1. **Doctors:** “Pharma companies are buying Doctors by offering monetary incentives. Give & take or commercial dealings by pharma companies are increased.”
2. **Chemists:** “Give & take by Doctors and pharma companies are increased, Doctors are not much concerned about quality or standard of medicine brands”
3. **MR’s & Managers:** “Effort based prescription generation is decreased, Doctors have become more corrupt and are focussing more on gifts and sponsorships.”

*Above feedbacks proves that Doctors prescription habits are adversely affected.*

**C.** Also from literature review, in a research article by **Thomas George (2010)**, on “Gifts to doctors, scientific information and the credibility gap in the Medical Council of India” in the Indian Journal of Medical Ethics, the author clearly concludes that gifts from pharma companies adversely affects the prescription habits of Doctors.

*Therefore from above data analyses, Hypothesis 02 is proved and accepted.*

**III.** The third hypothesis for this study is, “**Chemists and Stockists are not satisfied with the Trade-margins and Promotional Schemes offered by pharma companies.”**

From data analysis of Chemists & Stockists feedbacks following conclusions are made:

1. **Satisfaction about Trade Margin:** Majority of, i.e. overall 93%, Chemists and Stockists (89% & 97%) are not satisfied with the trade-margins offered by pharma companies in the last decade and only 7% of them are satisfied about the Trade-margin.
2. **Satisfaction about Promotional Schemes:** Majority of, i.e. overall 89%, Chemists and Stockists (85% & 90%) are not satisfied with the promotional schemes offered by pharma companies in the last decade, and only 11% are satisfied whereas 1% are neutral.

3. From data analysis of Chemists’ and Stockist’s expectations from pharma companies:
   i. **Chemists:** “Pharma companies should increase the trade margins of Chemists” & “Promotional schemes, gifts or bonus offers to Chemists should be increased.”
   ii. **Stockists:** “Trade margins & promotional schemes for Stockists should be increased”

*Therefore from above data analyses, Hypothesis 03 is proved and accepted.*
5.1 Conclusions about Objectives:

1. The first objective of this study is, “To analyze the changes in marketing scenario of prescription-based medicines in the last decade in Ahmednagar district.”

A. Following changes were acknowledged by the Stakeholders in marketing scenario of prescription-based medicines in the last decade, in Ahmednagar district:

1. **Change in Number of Pharmaceutical Companies:** It is noticed that totally 100% each, of Doctors, Chemists, Stockists, MR’s and Managers have replied that there is increase in number of pharma companies in Ahmednagar district, in the last decade. Thus, it is concluded that majority of, i.e. overall 100% Stakeholders, have responded that “Number of pharmaceutical companies marketing in Ahmednagar district have increased in the last decade.” Out of these, 75% responded as considerable increase, 24% responded as moderate increase and only 1% responded as slight increase in number of pharma companies in Ahmednagar district, in the last decade.

2. **Change in Number of Divisions of Pharma Companies:** It is noticed that totally 100% each, of Doctors, Chemists, Stockists, MR’s and Managers have replied that there is increase in number of divisions of pharma companies marketing in Ahmednagar district. Thus, it is concluded that majority of, i.e. overall 100% Stakeholders, have responded that “Number of divisions of pharma companies marketing in Ahmednagar district have increased in the last decade.” Out of these, 71% responded as considerable increase, 27% responded as moderate increase and only 2% responded as slight increase in number of divisions of pharma companies in Ahmednagar district, in the last decade.

3. **Change in Number of Small or Local Pharma Companies:** It is noticed that totally 100% each, of Doctors, Chemists, Stockists, MR’s and Managers have replied that there is increase in number of small or local pharma companies in Ahmednagar district. Thus, it is concluded that majority of, i.e. overall 100% Stakeholders, have replied that “Number of small or local pharma companies marketing in Ahmednagar district have increased in the last decade.” Out of these, 48% responded as considerable increase, 42% responded as moderate increase and only 10% responded as slight increase in number of small or local pharma companies, in Ahmednagar district, in the last decade.

4. **Change in Extent of Competition among Pharma Companies:** It is noticed that totally 100% each, of Doctors, Chemists, Stockists, MR’s and Managers have replied that there is increase in extent of competition among pharma companies in Ahmednagar district. Thus, it is concluded that majority of, i.e. overall 100% Stakeholders, have responded that “Extent of competition among pharma companies marketing in Ahmednagar district have increased in the last decade.” Out of these, 88% responded as considerable increase and
12% responded as moderate increase in extent of competition among pharma companies marketing in Ahmednagar district, in the last decade.

5. **Change in Frequency of Launching New Products by Pharma Companies:** It is noticed that totally 100% each, of Doctors, Chemists, Stockists, MR’s and Managers have replied that there is increase in frequency of launching new products by pharma companies marketing in Ahmednagar district, the last decade.

Therefore, it is concluded that majority of, i.e. overall 100%, Stakeholders have replied that “Frequency of launching new products by pharma companies have increased in the last decade.” Out of these, 68% responded as considerable increase, 30% responded as moderate increase and only 2% responded as slight increase in frequency of launching new products by pharma companies marketing in Ahmednagar district, in the last decade.

6. **Change in Prices of Medicines:** It is noticed that totally, 85% Doctors, 80% Chemists, 83% Stockists and 79% MR’s and Managers have replied that there is increase in prices of medicines, by pharma companies, in Ahmednagar district, in the last decade.

Therefore, it is concluded that majority of, i.e. overall 82%, Stakeholders have replied that “Prices of medicines have increased in the last decade.” Out of these, 75% responded as considerable increase and 7% responded as moderate increase in prices of medicines by pharma companies marketing in Ahmednagar district, in the last decade.

7. **Change in Availability of Medicines:** It is noticed that totally, 100% each, of Doctors, Chemists, Stockists and 89% MR’s & Managers have replied that there is improvement in availability of medicines in Ahmednagar district, in the last decade.

Thus, it is concluded that majority of, i.e. overall 97% stakeholders, have replied that “Availability of medicines has improved in Ahmednagar district in the last decade.” Out of these, 55% responded as moderate improvement, 29% responded as considerable improvement, and 13% responded as slight improvement in availability of medicines.

8. **Change in Quality of Medicines:** It is noticed that totally 99% Doctors, 100% Chemists & Stockists and 94% MR’s & Managers have replied that there is improvement in quality of medicines, in the last decade, in Ahmednagar district.

Thus, it is concluded that majority of, i.e. overall 98% Stakeholders have replied that “Quality of medicines have improved in the last decade.” Out of these, 34% responded as considerable improvement, 48% responded as moderate improvement, 16% responded as slight improvement in quality of medicines, in the last decade, in Ahmednagar district.

9. **Change in Packaging of Medicines:** It is noticed that totally 100% each, of Doctors, Chemists, Stockists, MR’s and Managers have replied that there is improvement in packaging of medicines, in the last decade, in Ahmednagar district.
Thus, it is concluded that majority of, i.e. overall 100% Stakeholders, have replied that “Packaging of medicines have improved in the last decade.” Out of these, 52% responded as considerable improvement, 45% responded as moderate improvement and 3% responded as slight improvement in packaging of medicines by pharma companies in the last decade, in Ahmednagar district.

10. Change in Marketing Strategies of Pharma Companies: It is noticed that totally, 93% Doctors, 84% Chemists, 90% Stockists and 90% MR’s & Managers have replied that there is improvement in marketing strategies of pharma companies, in the last decade. Thus, it is concluded that majority of, i.e. overall 90% Stakeholders have replied that “Marketing strategies of pharma companies have improved in the last decade.” Out of these, 45% responded as moderate improvement, 28% responded as considerable improvement and 17% responded as slight improvement in marketing strategies of pharma companies marketing in Ahmednagar district, in the last decade.

11. Change in Pharma Marketing Approach from Ethical to Unethical: It is noticed that totally, 100% Doctors, 95% Chemists, 93% Stockists and 99% MR’s & Managers replied that there is increase in unethical approach of pharma marketing in the last decade. Thus, it is concluded that majority of, i.e. overall 97% Stakeholders have replied that “Unethical pharma marketing approach has increased in the last decade.” Out of these, 63% responded as considerable increase, 27% responded as moderate increase and 7% responded as slight increase in unethical marketing approach of the pharma companies in the last decade, in Ahmednagar district.

12. Change in Dosage Convenience: It is noticed that totally, 100% each, of Doctors, Chemists, MR’s and Managers replied that there is improvement in dosage convenience of Patients, in Ahmednagar district, in the last decade. Thus, overall 100% Stakeholders have replied that “Dosage convenience of Patients taking prescription medicines have improved in the last decade.” Out of these, 55% responded as moderate improvement, 40% responded as considerable improvement, and 5% responded as slight improvement in dosage convenience of Patients, in last decade.

13. Change in Patient’s Compliance: It is noticed that totally, 100% each, of Doctors, Chemists, MR’s and Managers replied that there is improvement in Patient’s compliance for prescription-based medicines, in the last decade, in Ahmednagar district. Thus, it is concluded that majority of, i.e. overall 100% Stakeholders, have replied that “Patient’s Compliance has improved in the last decade.” Out of these, 55% responded as moderate improvement, 30% responded as considerable improvement, and 15% responded as slight improvement in Patient’s compliance, in the last decade, in Ahmednagar district.
14. **Change in Services to Patients like Free Check-ups and Camps:** It is noticed that totally, 94% Doctors & 100% each of Chemists, MR’s & Managers have replied that there is improvement in services to Patients like free check-ups and camps, in the last decade. Thus, it is concluded that majority of, i.e. overall 98% Stakeholders, have replied that “Services to Patients have improved in the last decade.” Out of these, 45% responded as moderate improvement, 27% responded as considerable improvement, and 26% responded as slight improvement in services to Patients like free check-ups and camps, in last decade.

15. **Change in Patients’ Awareness about Different Diseases & their Medications:** It is noticed that totally, 99% Doctors, 100% Chemists, and 93% MR’s & Managers replied that there is improvement in Patient’s awareness about different diseases & their medications, in the last decade, in Ahmednagar district. Thus, it is concluded that majority of, i.e. overall 97% Stakeholders, have replied that “Patient’s awareness has improved in the last decade.” Out of these, 54% responded as moderate improvement, 24% responded as slight improvement, and 19% responded as considerable improvement, in Patient’s awareness about different diseases & their medications, in the last decade, in Ahmednagar district.

16. **Change in Marketing Communication Messages:** It is noticed that totally, 93% Doctors, and 95% MR’s & Managers have replied that there is improvement in marketing communication messages, in the last decade, in Ahmednagar district. Thus, it is concluded that majority of, i.e. overall 94% Doctors, MR’s & Managers have replied that “Marketing communication messages have improved in the last decade.” Out of these, 45% responded as moderate improvement, 28% responded as slight improvement, and 21% responded as considerable improvement, in marketing communication messages by pharma companies, in last decade, in Ahmednagar district.

17. **Change in Quality of Brand Promotional Tools:** It is noticed that totally, 90% Doctors, and 89% MR’s & Managers have replied that there is improvement in quality of brand promotional tools by pharma companies, in the last decade, in Ahmednagar district. Therefore, it is concluded that majority of, i.e. overall 89% Doctors, MR’s & Managers have replied that “Quality of brand promotional tools has improved in the last decade.” Out of these, 46% responded as moderate improvement, 26% responded as slight improvement, and 17% responded as considerable improvement, in quality of brand promotional tools by pharma companies, in the last decade, in Ahmednagar district.

18. **Change in Novelty of Brand Promotional Tools:** It is noticed that totally, 98% Doctors, and 91% MR’s & Managers have replied that there is improvement in novelty of brand promotional tools by pharma companies, in the last decade, in Ahmednagar district.
Therefore, it is concluded that majority of, i.e. overall 94% Doctors, MR’s & Managers have replied that “Novelty of brand promotional tools has improved in the last decade.” Out of these, 51% responded as moderate improvement, 23% responded as slight improvement, and 20% responded as considerable improvement, in novelty of brand promotional tools by pharma companies, in the last decade, in Ahmednagar district.

19. Change in Time taken by Pharma Companies for Supply of Medicines to Stockists: It is noticed that totally, 100% each, of Stockists, MR’s & Managers have replied that there is decrease in time taken by pharma companies for supply of medicines to Stockists, in the last decade, in Ahmednagar district. Therefore, it is concluded that majority of, i.e. overall 100% each, of Stockists, MR’s & Managers have replied that “Time taken by pharma companies for supply of medicines to Stockists has decreased in the last decade.” Out of these, 77% responded as considerable decrease, 19% responded as moderate decrease, and 4% responded as slight decrease in time taken by pharma companies for supply of medicines to Stockists, in the last decade.

20. Change in Proportion of Use of 3 C’s in Marketing to Generate Expected Business: It is noticed that the average proportion of use of 3 C’s in marketing have changed for Convince from earlier 73% it has decreased up to 39%; for Confuse from earlier 15% it has decreased up to 9%, and for Corrupt it has increased from earlier 12% up to 52%, due to changing pharma marketing scenario, in the last decade, in Ahmednagar district. Thus, it is concluded that the proportion of use of 3 C’s in marketing has considerably changed in the last decade. The proportion of Convince is decreased by 34%, Confuse is decreased by 6% and Corrupt is increased by 40% in the last decade.

21. Change in Sales Growth Expected from MR’s & Managers: It is noticed that the average sales growth expected by pharma companies from MR’s & Managers has increased from earlier 15 to 20% it has increased up to 30 to 40%, due to changing pharma marketing scenario, in the last decade, in Ahmednagar district. Thus, it is concluded that the average sales growth expected by pharma companies from MR’s & Managers has increased by 15 to 20% in the last decade, in Ahmednagar district.

22. Change in Return on Investment Expected from MR’s & Managers: It is noticed that the average return on investment expected from MR’s & Managers has decreased from earlier 10 times to recent 5 times, due to changing pharma marketing scenario, in last decade. Thus, it is concluded that the average return on investment expected from MR’s & Managers has decreased by 5 times in the last decade, in Ahmednagar district.

23. Change in Extent of Promotional Tools Used for Doctors in the Last Decade: It is noticed that majority of, i.e. 80 to 100% Doctors have accepted that there is large increase
in extent of use of CME’s, Regular MR Visits, Product Literatures, Updates, Monographs, Patient Educational Booklets, High Value Gifts and Advertisements thro’ Mails/ SMS/ Websites. About 50 To 79% Doctors admitted that Small Group Meetings, Medical Equipment as Gifts, Low Value Gifts, National Conference Sponsorships, Medical Books & Journals and Special Activities are also increased by pharma companies, in last decade. About 20 to 49% Doctors have admitted that there is small increase in extent of use of promotional tools like Clinical Trials & Consultancy Honorarium, Other Emoluments, International Conference Sponsorships, Sponsored Family Tours, and Media Publicity Activities, in the last decade, in Ahmednagar district.

Majority of Doctors also replied that use of Physician’s Samples (94%) & Visual Aid Detailing (83%) has decreased, in the last decade, by pharma companies.

24. Change in Extent of Promotional Tools Used for Chemists in the Last Decade: It is noticed that majority of, i.e. 80 to 100%, Chemists have accepted that there is large increase in extent of use of Promotional Schemes, Trade Discounts, and Special or Extra Schemes for them. About 20 to 50% of Chemists have admitted that there is small increase in extent of use of Letters/ Mails/ SMS for Schemes, Group Meetings, and High Value Gifts (Value >Rs. 500), by pharma companies, in the last decade. About 51 to 95%, of Chemists have replied that there is no much change in extent of use of Birthday & Anniversary Day activities and Credit facility for them. Majority of Chemists admitted that the extent of use of Low Value Gifts (Value < Rs.500), for them, have decreased in the last decade in Ahmednagar district.

25. Change in Extent of Promotional Tools Used for Stockists in the Last Decade: It is noticed that majority of, i.e. 100% Stockists, have accepted that there is large increase in extent of use of Promotional Schemes, Special / Extra Schemes and Letters/ Mails/ SMS for Schemes, for them, by pharma companies, in the last decade. About 40% to 70% of Stockists have admitted that there is small increase in the extent of use of Low Value Gifts, Group Meetings, Trade Discounts, High Value Gifts, and Birthday & Anniversary Day activities, by pharma companies for them. Majority of, i.e. 70% to 100% Stockists, replied that there is no much change in extent of use of Credit Facility by pharma companies. Only 20% to 25% of Stockists have admitted that there is small decrease in extent of use of Trade Discounts, and Credit Facility by pharma companies in the last decade.

26. Change in Return on Investment Expected from MR’s & Managers: From data analysis of MR’s & Manager’s feedbacks, it is noticed that the average return on investment expected from MR’s & Managers has decreased from earlier 10 times to recent 5 times, due to changing pharma marketing scenario, in the last decade, in Ahmednagar district.
Thus, it is concluded that the average return on investment expected from MR’s & Managers has decreased by 5 times in the last decade, in Ahmednagar district.

B. Following positive and negative changes were mentioned by the Stakeholders while answering open ended questions:

i. **Positive Changes**: Some of the important positive changes mentioned are -
   a. **Doctors**- “New research molecules with advanced technology are introduced, Multiple brand options with quality & price are increased, Academic inputs from pharma companies have improved, Area coverage by companies have improved, Use of multimedia for marketing communication have increased, Pharma companies are coming with innovative marketing strategies, Company services to Doctors have improved.”
   b. **Chemists**- “Services to Chemists like, prompt delivery of goods, execution of schemes & product availability at Stockists level have improved, Patients are taking complete medication, Medicine prices are now inclusive of all taxes, Some companies have started group meeting for Chemist education, Expiry & breakage settlement by pharma companies have improved, Profit margin is increased”
   c. **Stockists**-“Quick delivery of goods, computerized & online orders, Better marketing efforts, Increase in business turnover, Improvement in expiry-breakage settlement by pharma companies, Sufficient sales team in pharma companies.”
   d. **M.R.’s and Managers**- “Newer advanced medicines & drug delivery systems introduced; More job opportunities & handsome salary packages; Better availability of medicines up to even micro level; better marketing support, more facilities to sales team by MNC’s & reputed companies; e-Reporting is good, Doctor gifts, investments, and other inputs are improved, Ambitious growth and high turnover of pharma industry; Working hour of MR’s are reduced from 12 hours to 8 hours; Some quality medicines are available at reasonable prices.”

ii. **Negative Changes**: Some of the important negative changes mentioned are -
   a. **Doctors**-“Commercialization, Deal making, Give & take policy, Unethical promotion & Aggressive and target oriented marketing by pharma companies have increased, Propaganda marketing & Irrational drug combinations have also increased, brand names are not properly selected by some companies, Value addition by MR’s is declined, Queries are not properly resolved by MR’s, Too frequent visits by MR’s are boring, Medicine prices are increasing, Too many divisions of same pharma companies are confusing, pharma companies are buying Doctors, Business ethics are declining in pharma marketing”
   b. **Chemists**- “Competition has increased, Doctors malpractices have increased, Doctors attached chemists are increased & can only survive, Doctor’s dispensing have also
increased, Propaganda marketing by local companies is increased, same drug molecules are available with many brand names, Chemist’s inventory & expiry amount has increased, Many Stockists have reduced their credit facility.”

c. **Stockists**—“Competition & Commercialization in pharma industry have increased; medicine prices are still very high, Difficult to increase turnover due to more number of Stockists, Generic, local & propaganda medicines are supported by Chemists and Doctors, Doctors are earning more unethically, Inventory and expiry-breakage amount has increased, Credit period by companies is reduced.”

d. **MR’s & Managers**—“Corruption, Give and take, and Cut-practice by Doctors is increased; Sales target pressure, overall work pressure & mental harassment have increased a lot; Ethical & effort-based brand promotion is lost; No value for honesty; No job satisfaction; Attrition rate of MR’s has increased; Propaganda marketing is increased; Non-graduate MR’s are increasing; Company expectations are increasing and are difficult to meet; Difficult to make Doctors calls due to appointment system and call days/ timing system adopted by many Doctors; Relations with Doctors have changed to commercial”

2. The second objective of this study is, “To study the impact of changing marketing scenario in prescription-based medicines on Stakeholders in Ahmednagar district.”

Following impacts were acknowledged by the selected Stakeholders:

**A. IMPACT ON DOCTORS:**

1. **Impact on Number of Substitutes Available for Doctors to Prescribe:** It is noticed that totally 100% each, of Doctors, Chemists, MR’s & Managers have replied that there is increase in number of substitutes available for Doctors to prescribe, in the last decade.

   Thus, it is concluded that majority of, i.e. overall 100%, Stakeholders have replied that “Number of substitutes available for Doctors to prescribe have increased in the last decade.” Out of these, 68% responded as considerable increase, and 32% responded as moderate increase in number of substitutes available for Doctors, in the last decade.

2. **Impact on Time Spent by Doctors for Counseling Patients:** It is concluded that majority of, i.e. overall 81% Doctors have replied that there is decrease in time spent by them for counseling patients, in the last decade. Out of these, 69% responded as slight increase, 11% responded as moderate increase, and 1% responded as considerable increase, in time spent by Doctors for counseling patients in the last decade, in Ahmednagar district.

3. **Impact on Cure Rate of Patients:** It is concluded that majority of, i.e. overall 99% Doctors have replied that there is improvement in the cure rate of patients, in the last decade. Out of these, 55% responded as moderate improvement, 38% responded as considerable improvement, & 6% responded as slight improvement in cure rate of patients in last decade.
4. Impact on Average Number of Patients Checked by Doctors: It is concluded that majority of, i.e. overall 90% Doctors have replied that there is increase in average number of patients checked by them, in the last decade. Out of these, 67% responded as moderate increase, 16% responded as slight increase, and 7% responded as considerable increase in average number of patients checked by Doctors, in the last decade.

5. Impact on Knowledge Update Status of Doctors: It is concluded that majority of, i.e. overall 96% Doctors have replied that there is improvement in their knowledge update status, in the last decade. Out of these, 60% responded as moderate improvement, 26% responded as slight improvement, and 10% responded as considerable improvement in their knowledge update status, in the last decade, in Ahmednagar district.

6. Impact on Business Expectations of MR’s & Managers from Doctors: It is concluded that majority of, i.e. overall 100% Doctors have replied that there is increase in business expectations of MR’s and Managers from them, in the last decade. Out of these, 55% responded as considerable increase, 41% responded as moderate increase, and 4% responded as slight increase in business expectations of MR’s and Managers from them, in last decade, in Ahmednagar district.

7. Impact on Relationship of Doctors with MR’s and Managers: It is concluded that majority of, i.e. overall 80% Doctors have replied that their relationship have changed from personal to commercial or professional, due to changing pharma marketing scenario, in the last decade. Out of these, 54% replied that that their relationship has changed from personal to commercial, 26% replied that their relationship has changed from personal to professional, due to impact of changing marketing scenario, in the last decade.

8. Impact on Prescription Habits of Doctors: It is noticed that 85% Chemists and 100% MR’s & Managers have responded that changing marketing scenario have adversely affected Doctor’s prescription habits in the last decade. Therefore, it is concluded that majority of, i.e. Overall 93% Chemists and MR’s & Managers have responded that prescription habits of Doctor’s are adversely affected, in the last decade. Out of these, 65% responded that prescription habits are highly affected adversely, 23% replied that prescription habits are moderately affected adversely, and 5% replied that they are slightly affected adversely, due to changing marketing scenario in prescription medicines in the last decade, in Ahmednagar district.

B. IMPACT ON CHEMISTS:

1. Impact on Investment Amount of Chemists: It is concluded that majority of, i.e. overall 100% Chemists have replied that there is increase in their investment amount, in the last decade. Out of these, 60% responded as moderate increase, 34% responded as
considerable increase, and 6% responded as slight increase in their investment amount, in the last decade, in Ahmednagar district.

2. Impact on Expiry and Breakage Amount of Chemists: It is concluded that majority of, i.e. overall 80% Chemists have replied that there is increase in their expiry and breakage amount, in the last decade. Out of these, 33% responded as moderate increase, 26% responded as considerable increase, and 21% responded as slight increase in their expiry & breakage amount, in the last decade.

3. Impact on Business Turnover of Chemists: It is concluded that majority of, i.e. overall 90% Chemists have replied that there is increase in their business turnover, in the last decade. Out of these, 57% responded as moderate increase, 17% responded as slight increase, and 16% responded as considerable increase, in their business turnover, in the last decade, in Ahmednagar district.

4. Impact on Business Profitability of Chemists: It is concluded that majority of, i.e. overall 92% Chemists have replied that there is increase in their business profitability, in the last decade. Out of these, 57% responded as slight increase, 24% responded as moderate increase, and 11% responded as considerable increase, in their business profitability.

5. Impact on Expectations by MR’s and Managers for Orders from Chemists: It is concluded that majority of, i.e. overall 79% Chemists have replied that there is increase in expectations by MR’s and Managers for orders, in the last decade. Out of these, 39% responded as considerable increase, and 22% responded as moderate increase, and 18% responded as slight increase, in expectations by MR’s for orders of their company medicines, in the last decade, in Ahmednagar district.

6. Impact on Buying Habits of Chemists: It is noticed that totally 74% Chemists, 100% Stockists have replied that there is increase in buying habits of Chemists from bulk to itemized, in the last decade. Therefore, it is concluded that majority of, i.e. overall 86% Chemists & Stockists have replied that “Buying habits of Chemists have increased from bulk to itemize in the last decade.” Out of these, 47% have responded as moderate increase, 22% responded as considerable increase, and 17% responded as slight increase in buying habits of Chemists from bulk to itemize in the last decade.

C. IMPACT ON STOCKISTS:

1. Impact on Investment Amount of Stockists: It is concluded that majority of, i.e. overall 100% Stockists have replied that there is increase in their investment amount, in the last decade. Out of these, 90% responded as considerable increase, and 10% responded as moderate increase, in their investment amount, in the last decade, in Ahmednagar district.
2. Impact on Expiry and Breakage Amount of Stockists: It is concluded that majority of, i.e. overall 100% Stockists have replied that there is increase in their expiry and breakage amount, in the last decade. Out of these, 73% responded as moderate increase, 23% responded as considerable increase, and 4% responded as slight increase in their expiry & breakage amount, in the last decade.

3. Impact on Business Turnover of Stockists: It is concluded that majority of, i.e. overall 100% Stockists have replied that there is increase in their business turnover, in the last decade. Out of these, 63% responded as moderate increase, 30% responded as considerable increase, and 7% responded as slight increase, in their business turnover.

4. Impact on Business Profitability of Stockists: It is concluded that majority of, i.e. overall 100% Stockists have replied that there is increase in their business profitability, in the last decade. Out of these, 67% responded as moderate increase, 30% responded as slight increase, and 3% responded as considerable increase, in their business profitability.

5. Impact on Expectations by MR’s and Managers for Orders from Stockists: It is concluded that majority of, i.e. overall 100% Stockists have replied that there is increase in expectations by MR’s and Managers for orders, in the last decade. Out of these, 53% responded as considerable increase, 30% responded as moderate increase, and 17% responded as slight increase, in expectations by MR’s for orders of their company medicines, in last decade, in Ahmednagar district.

D. IMPACT ON MR’S AND MANAGERS:

1. Impact on Number of Medical Representatives and Managers: It is noticed that totally 100% each, of Doctors, Chemists, Stockists, MR’s and Managers have replied that there is increase in number of MR’s and Managers in Ahmednagar district, in the last decade. Thus, it is concluded that majority of, i.e. overall 100%, Stakeholders have replied that “Number of MR’s and Managers in Ahmednagar district have increased in the last decade.” Out of these, 77% responded as considerable increase, 20% responded as moderate increase and only 3% responded as slight increase in number of MR’s and Managers, in Ahmednagar district, in the last decade.

2. Impact on Quality of Product Trainings given by Pharma Companies: It is concluded that majority of, i.e. 88% MR’s & Managers have replied that there is decline in quality of product trainings given by pharma companies, in the last decade. Out of these, 58% responded as slight decline, 22% responded as moderate decline, and 8% responded as considerable decline in quality of product trainings, in last decade.

3. Impact on Knowledge Update Status of MR’s & Managers: It is concluded that majority of, i.e. overall 90% MR’s & Managers have replied that there is improvement in their
knowledge update status, in the last decade. Out of these, 38% responded as moderate improvement, 34% responded as slight improvement, and 18% responded as considerable improvement in their knowledge update status, in the last decade, in Ahmednagar district.

4. **Impact on Ease of Implementing Marketing Strategies**: It is concluded that majority of, i.e. 80% MR’s & Managers replied that there is improvement in ease of implementing marketing strategies of pharma companies by them, in the last decade. Out of these, 28% responded as moderate improvement, 26% responded as considerable improvement, and 26% responded as slight improvement in ease of implementing marketing strategies designed by pharma companies, in the last decade, in Ahmednagar district.

5. **Impact on Field-working Time available for MR’s & Managers**: It is concluded that majority of, i.e. 100% MR’s & Managers have replied that there is decrease in field-working time available for them, in the last decade. Out of these, 64% responded as moderate decrease, and 36% responded as considerable decrease in field-working time available for them, in the last decade, in Ahmednagar district.

6. **Impact on Time spent by MR's for Collecting Market Information**: It is noticed that totally 80% Chemists, 77% Stockists and 80% MR’s & Managers have replied that there is decrease in time spent by MR's for collecting market information, in the last decade. Therefore, it is concluded that majority of, i.e. overall 79%, Stakeholders have replied that, “Time spent by MR's for collecting market information have decreased in the last decade.” Out of these, 47% Chemists, Stockists, MR’s & Managers responded as slight decrease, 29% responded as moderate decrease, 3% responded as considerable decrease in overall quality of MR’s and Managers, in the last decade, in Ahmednagar district.

7. **Impact on Ease of Getting Important Doctors’ Calls**: It is concluded that majority of, i.e. 100% MR’s & Managers have replied that there is decline in ease of getting important Doctors’ calls, in the last decade. Out of these, 69% responded as moderate decline, 26% responded as considerable decline, and 5% responded as slight decline in ease of getting important Doctor’s calls, in the last decade, in Ahmednagar district.

8. **Impact on In-clinic Time Spared by Doctors for MR’s & Managers**: It is concluded that majority of, i.e. 92% MR’s & Managers have replied that there is decrease in in-clinic time spared by Doctors for them, in the last decade. Out of these, 51% responded as considerable decrease, 33% responded as slight decrease, and 8% responded as moderate decrease in in-clinic time available for them, in the last decade, in Ahmednagar district.

9. **Impact on Reciprocal Expectations of Doctors from MR’s And Managers**: It is concluded that majority of, i.e. 100% MR’s & Managers have replied that there is increase in reciprocal expectations of Doctors from them, in the last decade. Out of these, 86%
responded as considerable decrease, 11% responded as moderate decrease, and 3% responded as slight decrease in in-clinic time available for them, in the last decade.

10. **Impact on Relationships of MR’s and Managers with Doctors:** It is concluded that majority of, i.e. overall 78% MR’s & Managers have replied that their relationship have changed from personal to commercial or professional, due to changing pharma marketing scenario, in the last decade. Out of these, 55% replied that that their relationship has changed from personal to commercial, 23% replied that their relationship has changed from personal to professional, due to changing marketing scenario, in the last decade.

11. **Impact on Difficulty of Achieving Sales Targets by MR’s and Managers:** It is concluded that majority of, i.e. 100% MR’s & Managers have replied that there is increase in their difficulty of achieving sales targets given by their company, in the last decade. Out of these, 63% responded as considerable increase, and 37% responded as moderate increase, in difficulty of achieving sales targets, in the last decade, in Ahmednagar district.

12. **Impact on Company Pressure for Achieving Expected Sales Targets:** It is concluded that majority of, i.e. 100% MR’s & Managers have replied that there is increase in their company pressure for achieving expected sales targets, in the last decade. Out of these, 88% responded as considerable increase, 11% responded as moderate increase, and 1% responded as slight increase, in difficulty of achieving sales targets, in last decade.

13. **Impact on Company Business Turnover:** It is concluded that majority of, i.e. 100% MR’s & Managers have replied that there is increase in their company business turnover, in the last decade. Out of these, 60% responded as considerable increase, 31% responded as moderate increase, and 9% responded as slight increase, in their company business turnover, in the last decade.

14. **Impact on Overall Work Pressure & Stress (Physical & Mental) Level:** It is concluded that majority of, i.e. 100% MR’s & Managers have replied that there is increase in their overall work pressure & stress (physical & mental) level, in the last decade. Out of these, 72% responded as considerable increase, 25% responded as moderate increase, and 3% responded as slight increase, in their overall work pressure & stress (physical & mental) level, in the last decade, in Ahmednagar district.

15. **Impact on Overall Job Satisfaction of MR’s & Managers:** It is concluded that majority of, i.e. 84% MR’s & Managers have replied that there is decline in their overall job satisfaction, in the last decade. Out of these, 40% responded as slight decline, 29% responded as moderate decline, and 15% responded as considerable decline in their overall job satisfaction, in the last decade, in Ahmednagar district.
16. Impact on Frequency of Shifting Companies by MR’s and Managers: It is noticed that totally 100% each, of Doctors, Chemists, Stockists, MR’s and Managers have replied that there is increase in frequency of shifting companies by MR’s and Managers, in the last decade due to changing marketing scenario in prescription-based medicines. Thus, it is concluded that majority of, i.e. overall 100%, Stakeholders have replied that “Frequency of shifting companies by MR’s and Managers have increased in the last decade.” Out of these, 60% responded as considerable increase, 35% responded as moderate increase and only 5% responded as slight increase in frequency of shifting companies by MR’s and Managers, in Ahmednagar district, in the last decade.

17. Impact on Overall Quality of MR’s and Managers: It is noticed that totally 89% Doctors, 88% Chemists, 87% Stockists and 89% MR’s & Managers have replied that there is decline in overall quality of MR’s and Managers, in the last decade in Ahmednagar district. Therefore, it is concluded that majority of, i.e. overall 88%, Stakeholders have replied that, “Overall quality of MR’s and Managers have declined in the last decade.” Out of these, 37% responded as moderate decline, 34% responded as slight decline, 17% responded as considerable decline in overall quality of MR’s and Managers, in the last decade.

3. The third objective is, “To know the expectations of stakeholders in Ahmednagar district from pharmaceutical companies marketing prescription-based medicines.”

Expectations of Stakeholders from pharma companies marketing in India:

a. Expectations of Doctors:

i. Pharmaceutical companies should use following brand promotions tools:

Academic inputs like Product Literatures, CD’s or DVD’s, National & International Journals, CME Programs, Workshops, National and International Seminars and Conferences, Conference Proceedings or DVD’s of the same, Medical Books, e-Books, Subscriptions to e-Libraries, online journals & Academic Websites, New Product Monographs, Customized Samples for personal use, Clinical Trials, Lecture by R & D persons of pharma companies, Patient Educational Booklets, Audio-visual Detailing on Laptop, TAB or I-Pads, Advanced Medical Equipment for Clinic or Hospital use, Patient Educational Programs & OPD Campaigns for increasing patient’s awareness.

ii. Other expectations of Doctors includes following:

a) DO’s:

1. “Good quality medicines should be available at reasonable price”
2. “Regular MR visits with properly trained & qualified MR’s”
3. “Brand name should be easy to remember”
4. “Plan business strategies based on Indian socio-economic structure”
5. “GP & Consultant products differentiation should be there while promotion”
6. “Mails / SMS should be used for brand reminder”
7. “Restrict MR visits to monthly once”
8. “Generic & ethical brands price gap should be reduced”
9. “Promote products for right indications”
10. “Easy Availability of products”
11. “Doctor specific brand promotion should be ensured.”
12. “Provide samples for personal use to Doctors”
13. “Provide product updates regularly.”
14. “Pharma marketing should be more patient oriented”
15. “Good detailing & presentation, appearance of MRs should be ensured”

b) DON’Ts:
1. “Target oriented gifting or sponsorship should be stopped’
2. “Give & take or Unethical brand promotion should be stopped”
3. “Irrational drug combinations should be avoided”
4. “Don't sponsor personal requirements of Doctors”
5. “MR should not give misleading, false or incomplete information”
6. “Avoid communicating the demerits of the competitor brands.”
7. “Stop trying to buy Doctors.”
8. “Avoid promoting too many brands.”
9. “Don’t increase the prices of medicines.”
10. “Don't play with life of patients by supplying substandard medicines.”
11. “Don't pressurize doctors to prescribe products.”
12. “Phone calls and SMS for brand promotion should be not be used.”

b. Expectations of Chemists:

i. Pharma companies should use following brand promotions tools for Chemists:
   Chemists meetings for knowledge update, CIMS / MIMS Books, Good trade-margins, discounts, Promotional Schemes, Quality gift articles, Patient Education booklets, New product’s information, Short Books, Samples for personal use.

ii. Other expectations of Chemists includes following:

a) DO’s:
1. “Chemists group meetings should be arranged for knowledge update.”
2. “Better quality products at reasonable price”
3. “Expiry- Breakage settlement should be improved”
4. “Taste of tablet or liquid should be liked by patients”
5. “MR / Manager stability or retention should be ensured”
6. “Easy availability of Products”
7. “Regular gifts to Doctors as well as Chemists should be given.”
8. “Product side effects or misuse guidelines should be given to Doctors.”
9. “Free check-ups and camps should be arranged regularly by pharma companies.”
10. “Chemists & Doctors’ visits should be given equal importance.”

b) DON’Ts:
1. “Propaganda marketing should be stopped”
2. “Number of Company divisions should be reduced”
3. “Unethical promotional expenses should be avoided to reduce medicine prices.”
4. “Promotional schemes should not be decreased or changed frequently.”
5. “Same company should not offer same molecule with different brand names.”
6. “Product dumping should be avoided.”

C. Expectations of Stockists:
   i. Pharma companies should use following brand promotions tools for Stockists:
      Pens & diaries, Good Quality Gifts, Good trade-margins, discounts, Promotional Schemes,
      Taxi Tour-POB Campaign, Samples for personal use, Cash discounts, Company shares at
      special price, Online order & payment facility, etc.
   ii. Other expectations of Stockists includes following:
      a) DO’s:
         1. “New product sales review should be taken from Stockists every month”
         2. “C & F services should be improved”
         3. “MR quality should be improved”
         4. “Promotional Inputs should also be planned & given to Stockists”
         5. “Proper focus on existing as well as new products”
         6. “Incentives should be given to order booking persons of Stockists”
         7. “Appoint good quality & competent persons as MRs and Managers”
         8. “Trade margins & promotional schemes for Stockists should be increased.”
         9. “Expiry /Breakage procedure should be improved.”
      b) DON’Ts:
         1. “Unethical & propaganda marketing should be stopped”
         2. “Supply without orders & dumping extra goods should be stopped.”
         3. “Big price difference between different brands should be reduced”
         4. “Limited number of new brands should be introduced.”
d. Expectations of Medical Representatives & Managers:

a) DO’s:
1. “Ethical & scientific promotion with proper training to MR's”
2. “Salary should be based on performance”
3. “Life-saving drugs should be available at affordable prices”
4. “Design better quality and innovative inputs for Doctors.”
5. “Companies should listen to feedbacks of sales team to encash their potential”
6. “Use of TAB's can reduce bag weight & increase Dr's interest in detailing”
7. “Give proper product trainings to MR's & Managers.”
8. “Offer good salaries, allowances, incentives and increments to field staff.”
9. “Select only science / pharmacy Graduates as Medical Rep's.”
10. “Retailing & Detailing should be ensured from field staff.”

b) DON’Ts:
1. “Unethical, Give & take and propaganda marketing should be stopped”
2. “Reduce Target pressure on MR's & Managers”
3. “Don’t detain MR's & don’t allow fast attrition.”
4. “Stop exaggerated promotion of products”
5. “Decrease Prices of medicines without compromising its quality”
6. “Don’t launch several me-too or common products / molecules”

4. The fourth objective of this study is, “To predict the future marketing trends of pharmaceutical companies marketing prescription-based medicines.”

Predictions about future marketing trends in Prescription-based Medicines:

A. All Stakeholders were asked to guess about future marketing trends in prescription-based medicines. Some of the important predictions are as under:
1. “Commercialization & Unethical business will increase further”
2. “Companies with good quality medicines will only survive in future”
3. “Pharma Marketing will become more aggressive & unethical than it is today.”
4. “Companies will hire hospitals in major cities & will offer jobs to Doctors in it”
5. “Medicine retail chain Shoppe’s may increase further”
6. “Company merging will increase further”
7. “Only companies with good R & D will survive in future”
8. “Online marketing will develop & will be used by Pharma companies”
9. “Pharma marketing will be done through mails, websites and mobiles in future.”
10. “Doctors may become the partners / Directors of pharma companies”
11. “Pharma market may go in the hands of Insurance companies”
B. Future Marketing trends predicted by experts in pharma industry:

I. **Subba Rao Chaganti**\(^7\) (2008) has predicted some of the future pharma marketing trends in his book ‘Pharmaceutical Marketing in India’ as given below:

- The pharmaceutical industry is likely to grow at much more rapid rate than the nineties. The Institutional market is likely to grow even faster than the industry. Diagnostics too will be an important segment.
- While governmental regulations and controls are likely to be more, the drugs policy will be more pragmatic and growth-oriented.
- The present rate of new product proliferation is likely to be checked.
- The competition is likely to intensity further. The increasing competition is likely to make pharmaceutical promotion even more challenging than now. Only innovative marketers with different strategies are likely to succeed.
- Companies will pay much greater attention towards human resources development & management development programs in particular to meet the challenges of the changing industrial relations scenario.
- The industry associations are likely to unite to meet the increasing pressure from government regulations and control, not-so-gentle demands from trade & association of medical representatives.
- The industry will continue to be in a consolidation mode and mood. There will be more and more mergers & acquisitions of brands as well as companies to achieve synergies.
- The Indian drug majors will continue to increase their R & D investments to capitalize on & become competitive to exploit the emerging opportunities in the areas of collaborative and contract research.

II. **Dr. Kumardatt Ganjare**\(^8\) (2011) has also forecasted some of the future pharma marketing trends in his book ‘Pharmaceutical Marketing: Strategies & Practices’ as given below:

- The Indian Pharmaceutical Market is highly competitive & will remain dominated by low priced, domestically-produced generics. As a result, India can be a key player in global pharma R & D and has a great opportunity to export generic drugs to developed countries for big $$.
- As more and more patents are expiring, it is going to create a huge opportunity for Indian generic product manufacturers to have increased sales.
- McKinsey & Co. predict that India’s pharma market could reach a size of USD 20 billion by 2015, becoming one of the top ten drug markets in the world.
• Innovation as well as original research in areas like Cardiovascular, Anti diabetic, Anti-AIDS etc. will become a growth driven segment in pharmaceutical marketing.

• MNC’s will make an aggressive bid for the Indian market as India moves towards TRIPS and international companies register their new drugs for patenting after 10 years.

• Smaller companies which has so far benefited from the protective regime, may be forced to become contracting units, or close shop.

• Within five years the top ten pharma companies will control over 60 per cent of world pharma market; contract research will also find a new horizon in Indian pharma market, and as a result, R & D costs will increase and will lead to more consolidation, mergers and acquisitions amongst multinational companies.

• In post GATT era co-marketing alliances will become a major life source for Indian companies to survive.

• Traditional medicinal systems like Ayurveda has a sales volume of Rs 1320 crore. There are more prospects in herbal market especially in European & Japanese markets.

III. According to IMS Prognosis report, the IPM is expected to grow strongly at a CAGR of between 15-17% during the next 5 years. Certain factors likely to drive this growth are:

➢ Greater expansion through marketing penetration (extra urban & rural areas)

➢ Epidemiological changes (Increase in longevity, rapid urbanization, rising incomes, lifestyle changes, growing disease awareness & diagnosis etc.)

➢ Expansion of the private hospital sector

➢ Growth in private health insurance coverage

➢ Gradual increase in government healthcare expenditure.

5.2 Recommendations:

1. Pharmaceutical marketing of prescription-based medicines is a kind of indirect marketing, where the decision maker is a Doctor and MR or Managers are the influencers. Therefore, developing and maintaining good healthy relations with Doctors is very important. Due to cut-throat competition in this field, unethical promotions have increased a lot. To avoid this, simple ethical activities can be done like offering quality academic references, organising live workshops to sharpen the skills of Doctors, to enrich knowledge of Doctors by asking them to join a medical library owned by pharma company, inviting Doctors on every fortnightly or weekly to attend case study sessions, live seminars or teleconferencing to share the practical experience of successful leading Doctors all across the world. These initiatives will be really helpful to pharma companies for ethical brand promotion.
2. As recommended by almost all stakeholders, the researcher would like to reiterate that pharmaceutical companies should focus on ethical marketing efforts and avoid gifting, personal sponsorships and monetary incentives to Doctors. This will save their marketing expenses and it will help them in cost saving and to reduce the prices of medicines as well as to invest in new drug developments.

3. MR’s and Managers feedbacks, recommended that field-force of pharma companies should be offered good salary packages & lucrative incentives to excel their sales targets. Further, to increase job commitment, dedication and to attract & retain talented field force, they should be offered pension schemes, accidental insurance, Group Family Medical Insurance, festival bonus, Leave Travel Allowance, etc. facilities. Motivational programs and grooming sessions should also be organized for them to improve their self-confidence. All this will ensure a favorable environment for them to grow and excel along with achievement of company goals and will also ensure their stability.

4. Modern marketing tools like social networking sites, internet websites, emails, mobile net-working, etc. should be used for brand promotion to save costs and improve marketing effectiveness. Care should be taken to avoid Doctors who don’t like these modern tools. Further, detailing on laptops, I-pads and Tablets will create more interest of Doctors, and will reduce the weights of bags of MR’s and Managers, therefore they should be preferred more.

5. As recommended by many Doctors, physician’s samples should be stopped for established products. Samples should be provided only for new drugs or medicines and that too in sufficient dosage quantity. ‘Customised sampling’ as per requirements of Doctors can be started for the personal use or requirement of Doctors. This will avoid a large wastage of sampling expenses and the same can be used to reduce the prices of medicines as expected by all the Stakeholders.

6. To build a good social image, pharma companies should take initiatives for social welfare by organising free medical camps at orphanages. They can even jointly start a charitable hospital for the social service to the poor, needy, economically backward patients.

7. To survive in a long run after implementation of product patent in India, pharma companies must focus to develop their own research & development team for the discovery of newer advanced drug molecules. There are lots of opportunities in this for treating diseases like HIV, Swine flu, Cancer, Heart diseases, Diabetes, Tuberculosis, Dengue, Arthritis and Ebola, etc.

8. At Chemist level, simple rapport development activities can be done with all leading chemists like organising meetings for detailed briefing about new product information,
sending them mails, circulars and SMS about product schemes, product availability, price
revisions, new MR contact details, company helpline numbers for chemist query
handling, etc. All this will help the company to collect good market feedback information
as well as to get support from them.

9. At Stockists level, prompt delivery of goods, quick settlement of credit notes for expiry,
breakage and nonmoving goods returned, regular follow up of inventory level and
avoiding dumping of goods will help to maintain good healthy relations with Stockists.
Further, MR’s should also see to that non-moving products should be liquidated within
sufficient time to avoid blockage of Stockists money and avoid future expiry of goods at
Stockists shelves. This will also improve the credibility of sales team as well as of
company in the minds of Stockists.

10. As recommended all the stakeholders, the researcher would also like to recommend that
pharma companies should be very keen while selecting the MR’s and the Managers as
they represent their company and also create company image in the market. They should
look for following qualities in them:
   i. Pleasing personality, ii. Good communication skills, voice as well as body language, iii.
   Good etiquettes and mannerisms, iv. Honesty and Sincerity, v. Confidence, vi. Enthusiasm,
   vii. Good scholastic, character & extra-curricular records, viii. Good
   listening abilities to understand customer’s feedbacks, ix. Good attitude, x. Good people
   skills for rapport building with customers and xi. Responsiveness, xii. Maturity, and xiii.
   Good overall qualities.

11. From MR and Managers feedbacks, the researcher would like to recommend that even
though there is cut-throat competition in the pharma industry; companies should plan and
allocate feasible sales targets for the sales teams. Because, if the sales targets are not
reasonable, it demotivates the sales team, it brings down their morale and self-confidence
also. In addition to this, they get pressurized from their managers therefore they can’t
enjoy their work and ultimately all this results in to their poor sales performance.
Retention and stability of field staff is also crucial for the long term success of pharma
companies. The sales growth expected by companies on previous year’s sales should not
be more than 15-20%.

12. Chemists and Stockists are also important pillars in marketing of prescription-based
medicines. Therefore Researcher would like to recommend that proper attention must be
given to them. They are also good source of market information and can act as brand
ambassadors for the companies treating them with due respect. Organising monthly or
quarterly meetings to share- i. The new product information, ii. Promotional schemes
planned for them, iii. Pharma industry updates, iv. Government policy changes, v. To motivate them by rewarding Best-selling Retailers or Stockists of the company, vi. To give prizes to best market information providing Chemists and Stockists, etc.

13. Based on Doctors, MR’s and Managers feedbacks, researcher would like to recommend that- i. MR visits should be restricted to maximum one to majority of Doctors and two visits for important Doctors, as Doctors also don’t like more MR visits, ii. New product launch should also be restricted maximum to 4 to 6 in a year, because more new products can’t be given proper focus by MR’s and supported by Doctors. So the new products launch efforts & expenses results in to wastage of resources. Further, the new products stocks made available at Chemists and Stockists shelves may also get expired or remain as non-moving in future which adds to above expenses. In all, it results in to a loss making affair instead of business opportunity.

14. Researcher would also like to suggest that pharma companies should either focus on starting their own hospitals or they should start creating strategic alliances with existing reputed big hospitals in major cities. This will ensure them assured business as well as it can save huge marketing expenses also.

15. From stakeholder’s feedbacks, Researcher would also like to recommend that pharma companies should invite all leading Doctors, Chemists, Stockists and Employees to invest in their company as shareholders or partners. This will automatically motivate them to support the pharma company in all aspects to improve their business in a long run.

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