

“Patient Centricity in Pharma Market”.

Synopsis Submitted to



The IIHMR University, Jaipur

for the partial fulfillment for the award of the degree of

Master of Business Administration (MBA)

in

Pharmaceutical Management

by

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Under the Supervision and Guidance of

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2021

DECLARATION BY STUDENT

I hereby declare that this dissertation titled **“Patient Centricity in Pharma Market”** is the bonafide record of my original researchwork. I declare that it has not been submitted to any other university or institution for the award of any degree or diploma. Information derived from the published or unpublished workof others has been duly acknowledged in the text.

Name of Student

Divya Thakur

Date – 25th June

2021

CERTIFICATE

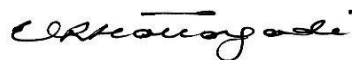
This is to certify that dissertation titled “ **Patient centricity in Pharma Market**” is a record of the research work undertaken by Miss. Divya Thakur in partial fulfillment of the requirements for the award of the degree of MBA (Pharmaceutical Management) from the IIHMR University, Jaipur under my guidance and supervision and his/her approach to the research study has been sincere, scientific, and analytical.

Faculty Guide – Dr. Rahul Sharma
IIHMR University, Jaipur

School Dean
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CERTIFICATE

This is to certify that Miss Divya Thakur in partial fulfillment of the requirements for the award of the degree of MBA (Pharmaceutical Management) from the IIHMR University, Jaipur has successfully completed her dissertation at The Enablers during March 22, 2021 to June 19, 2021.



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Mr. Vivek Hattangadi

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Enablers

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LIST OF ABBREVIATIONS

HCPs – Healthcare providers

PAGs – Patient advocacy groups

Abstract

Title :- To study the patient centric approach in pharma industry.

Mentor :- Dr. Rahul Sharma

Mr. Vivek Hattangadi.

Name :- Miss Divya Thakur

Background

In pharma industry, partners are perceiving the requirement for buyer interest in medical care dynamic customized treatments and by consolidated the patients point of view in item advancement and endorsement. In any case, the science around an engaging the patient and the components that make up a patient focused methodology is as yet advancing. There are not many advances and procedures which has been talk about in this report. Pharmaceutical organizations distinguishing substantial target around incorporate the patient viewpoints into different sorts of cycles all through the flow of a brand on the lookout and operationalize them. Pharma advertisers can shape further cooperation inside the business, with patient advisory groups (PAGs), clinicians, and wellbeing plans and influence exercises gained from different ventures that dominate at client centricity like retail and purchaser innovation. Drug organizations ought not just embrace this methodology of implanting patient centricity endeavors, however get ready to take an interest in an arising environment where sickness establishment, patient support bunch, wellbeing plans, wellbeing framework and doctors, controllers, contenders and health organizations are generally good associated with the goal that the patient is at the middle. To put it plainly, refining administrations is imperative to guarantee that any remaining showcasing methodologies, be it advanced or disconnected are precise and accomplish the most ideal outcomes.

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Introduction

The pharmaceutical industry on global level has reached more than USD 1,416 billion and showing a CAGR of 4% in this current year 2021. Due to rise in COVID -19 cases globally, all the pharmaceutical industries are more investing in development of quick and effective drugs for the people who are suffering. On the other hand, Pharma marketers' approach is also changing as per the change in scenario. Now a days, more of a patient centric approach is considering while marketing their brands. Patient centricity should be the mindset of pharma marketers in the 21st century. This concept works by solving patient problems in a right way, which results in increase in sales of the company's products and enhancing patient accessibility. By this way of marketing, marketers ensure better adherence to therapy, which means better patients outcome. This will also be beneficial for the brand. Patient centricity is building a brand for the future in many ways. Since beginning, we were told to endeavor to be a more patient centric in a way that we develop our medicines of the future for our patients. So, that is true that in history we have dealt with this by increasing patient numbers but this is not going to be last forever. This caused delays, increase in costs, and utilization of more resources and ultimately it hold-up registrations and patient access to effective medicines. We have seen that, generally when the patient starts getting relieved from the medicines, so they often stop taking medicines as it was being prescribed to them. This results in poor patient adherence during the treatment process and it is well recognized and historically addressed with relatively ineffective adherence programs. And recent studies estimated that non-adherence results in an incremental number of deaths per year in countries like US, Europe and significant higher cost. People who do not take their medicines on time and as prescribed will definitely not be able to receive an improved experience and outcomes cannot be seen. Simultaneously, this impacts patient's health outcomes with a drive towards compensation or reward by outcomes or results will have a direct impact on providers and payers too. It seems to many patients medicines are not meaningful enough or friendly enough and that is one of the reason for poor compliance to therapy. This mindset has to change. Patient who should receive the right information to enable them to make informed adherence decisions. This will results in patient pathway improvements and it will help patients with their disease more effectively and increase their levels of medication adherence. Industry traditionally used to be paternalistic in its interaction with patients but this is no longer the case in a world where patients are increasingly empowered to make their own health related decisions both as an individuals and a group.

Patient centricity is tied in with putting the patients as the principle place in an open and constant commitment of the patient to deferentially and compassionately by accomplishing the best insight and results for that individual and their family. Patient needs a moral and legitimate relationship and this should be reflected by the way we foster our showcasing systems for them and the manner in which we include patients insider savvy alongside HCPs and PAGs. So they are not treated as enduring yet as a basic and significant accomplice all the while. Patients have right to hope to be treated with deference and worry for what their identity is and the input they give. By making these responsibilities is tied in with making the best choice for patients. Any industry with an absence of customer driven methodology can't endure. Executing a genuine community oriented patient driven standard isn't the perfect thing to do with patients, it's anything but a fundamental advance for pharma maintainability to guarantee we can convey the powerful meds of tomorrow. By

running patient support programs or we can say patient friendly programs, we can enable access to holistic treatment and this approach can become a game changer soon. There is a study conducted by Eye for Pharma in 2014, in which 86% of pharma executives feel the patient – centricity is the key to their profitability.

Literature Review

1. What do patients want and is pharma delivering? To answer this question, Generally, Pharma companies asks healthcare professionals and patient advocacy groups about the patient's needs. But, instead of asking these questions to the above-mentioned people. Pharma marketers should ask these questions directly to the patients itself. These remains unclear, posing a real problem for pharma companies looking to better engage patients. Pharma marketers should know “what matters most to patients?” They should understand the patients' needs and attributes, seeks patient input, transparent communication through providing transparent information, communicates trial outcomes, including patient reported outcomes. There is always an agenda behind any strategic approach, so as for patient centric approach as well. It is not just a noble goal, but it also offers clear benefits to pharma companies. It is seen that; Doctors were more likely to prescribe medication from a pharma company they considered more patient centric.

An agenda items for any pharma company’s patient centricity efforts: -

- Marketers are needed to create a clear corporate identity and develop a cross geographical approach that highlights a direct engagement with patients and we should keep the doctors in the loop. Even better doctor’s consent should be taken before engaging the patients.
- Ensuring consistent execution in each local market and across function from R&D to commercial, to deliver consistent patient care outcomes.
- Engaging key stakeholders of the healthcare ecosystem especially nurses & patient supporting groups, to understand patient needs and what is and is not working.
- Acting on the tremendous patient centricity opportunity in large private pay market.

Pharmaceutical companies must have clarity into what patient wants and how well they are delivering on these fronts to design the right initiatives, set goals, and measure performance.

2. Organize patient centric activities in a sequence: -

Presently a days, clients are web smart and have a great deal of information. In pharma comparably patients are more proficient and enabled than any other time. They hope to connect with all organizations similarly. As the innovation driven world stances challenges for the drug business, it additionally holds freedoms to construct a positive human future by planning the wellbeing biological system to focus on the patient. During this COVID-multiple times, we have seen the squeezing needs at fast speed, for the wellbeing biological system to plan and convey reactions that address the patient's issues.

So, the question arises that, where is patient centricity now? As the business has developed lately, the advancing medical care model and wellbeing environment achieved by propels in innovation and more associated, engaged patients, implies genuine patient centricity is a continuous pursuit and it's anything but a squeezing need. Talking about the customer journey mapping from last few years. The trend in pharma marketing can be so it is as follows,

Customer 1.0	Product driven customers
Customer 2.0	Brand driven customers
Customer 3.0	Experience driven customers
Customer 4.0	Outcome driven customers

In the above-mentioned table, along with the development of industry, customers also evolved in their own choices. Earlier, it was all about product-based marketing, then it became all brand driven marketing, where customers used to buy the products based on their brand names. But, as the industry starts evolving, customers were more leaning towards the experience-based decisions. So, here they used to get an experience of the product before making any buying decision. And now it is more about the outcome driven customers. This means that where value comes from being available when and where the patient needs it.

3. Patient centricity must drive the pharma sector: -

This pandemic has shown that a comprehensive patient centric approach is the future of healthcare and the pharma industry. India enjoys an eminent position in the global pharmaceutical market – a position that was created through challenging work and grit. The 41 \$ billion Indian pharma industry exports to 200 countries. Looking forward, drug organizations should look to patient adherence programs. Here, pharma organizations need to plan and send programs focusing to the patients and influence both customary and computerized drew nearer to do as such. It is correct that drug industry needs to address patient adherence in a more essential manner and coordinated piece of its exercises, which will be useful for the patient and for the business generally. Along these lines, the pharma business should look profoundly improves patient adherence since rising medical care costs have squeezed the whole medical care industry and made it basic for all partners to move past conventional limits and drew nearer to address the patient continuum of care. Pharma organizations ought to raise patient adherence as an essential issue as a business switch contrasted with new treatment commencement.

4. Patient centric approach: -

It is an approach in healthcare system. It establishes a partnership among practitioners, patients, and their families to align decision with patient wants, needs, and preferences.

This also includes the delivery of specific education and support, where patient need to make these decisions and participate in their own care. The following benefits we can get from this approach are: -

- It will increase engagement with all stakeholders (patient, providers, and others), leading to decrease overall expenses.
- Enhanced information and comprehension among patient of their own wellbeing, prosperity, and medical services decisions, prompting improved consideration and diminished degrees of disease. This expanded information can likewise bring about better consideration after release, diminishing readmissions, clinic visits and optional counsels.

- By working together and drawing in with patients in the dynamic cycle, wellbeing suppliers can settle on better choice in regards to a patient wellbeing.
- Better personal satisfaction for patient prompts an increment in both patient and specialist fulfillment.

Find out new and novel ways for patient adherence. Better patient adherence will lead to superior treatment outcome. Thus, persistent medication adherence has become central to the HCPs meaning doctors, paramedical staff, and even care givers at home.

This happens because the HCPs are unable to understand the needs of the patients, probably because of the busy working schedule they have. The doctor to population ratio is very poor. According to WHO norms which says, it should be 1doctor for a population of 1000. But currently, it is 1 doctors for a population of 1350, including those in the AYUSH stream. As a result, patients needs sometimes go unaddressed. As a result patient's pain did not get addressed.

5. Patient centric healthcare: What providers must know? & Things that patients want.

As we as a whole realize that these days patients are turning out to be more dynamic members and need to add to their own consideration interaction while clinical professionals should perceive and consider what is the most significant and advantageous for them? This sort of approach includes offering extraordinary clinical types of assistance which will take into account the individual qualities, requirements and inclinations of a patient notwithstanding proficient discussion and direction of a wellbeing master. This showed an adjustment of essential suppositions in the medical services framework.

Here is an unavoidable issue, what do patients need? This is an inquiry that pharma isn't posing in the enabled patients. Requesting more from medical services experts and by suggestion, the business.

Better health – It is evident that everyone's fundamental need is to get well. Patients want information about their health condition and treatment which they are or will be undergoing. But it is seen that there is no desire for gimmicks or to be entertained. The greater part of the pharma organizations are venturing into giving data to their patients. Thus, it is about the substance and conveyance on the off chance that you will give advanced data and it should be helpful substance. It should be conveyed in a quick and an easy manner. This should likewise be possible by encompassing every item with a variety of administrations that offer genuine benefit is a patient need that pharma is progressively quick to give.

Credible information – More youthful patients are requesting greater contribution in the treatment choices. They need to completely comprehend their condition and the drawn out care plan. It is an amazingly elusive trustworthy data online in light of the fact that there is so much accessible. That is the reason numerous individuals actually depend generally on their personal consulting physicians or at times drug specialists.

HCP contact – Patients need direct contact with their guardians, while they are searching somewhere else for more data, cooperation with medical care experts is the need. The facts confirm that, innovation can't supplant patient – guardian association it can improve it. Rather than looking to sidestep HCPs (Health Care Professionals), there is a chance to utilize patient correspondence answer for engage specialist to improve their patient connection. Client who faces staff can give medical care experts advanced devices to assist them with disclosing a condition to patient innovation can likewise be utilized to reinforce medical care experts on going commitment with patient by means of eliminate arrangement and on request data administrations. Patients needs data that is believable and cutting-edge. Specialist's needs to give it, utilizing innovation to assist patient with canning two necessities at the same time.

Research Methodology

A total of 100 pharma industry professionals were selected for the survey which aims to find the building healthcare brands with a patient centric approach. The variables were found based on the secondary research and then accordingly questions were formed. The objective is to answer the following questions. In addition to which, we would be able to know that, whether the patient centric approach will be effective in pharmaceutical marketing.

1. Study design – Analytical study
2. Population for study – Marketers of Pharmaceutical companies
3. Area of study – India
4. Data collection duration – Two months
5. Data type – Secondary data
6. Size of sample – 100 Pharma companies marketers
7. Inclusion criteria – Marketers of all therapeutic divisions
8. Exclusion criteria – Medical representatives (MR)
9. Data collection tools – Google forms
10. Data entry tool – Microsoft Excel 2013.

Research Questions

1. Years of experience: -
2. Does patient centricity offer any benefits to a pharma organization?
3. Are you as a pharma marketer, using patient centric approach?
4. Patient centricity can be considered as: -
5. Do you see the pharma industry its patient centric strategies for future?

RESEARCH OBJECTIVES

- To understand the relevance of patient centric approach in pharmaceutical marketing.
- To understand the influence of consumer centric approach in pharma business.

SURVEY SAMPLE

For this research study purpose, a sample of 100 pharma marketers were surveyed through questionnaire. The sample consists of marketers of different organizations, which were differentiated based on their experiences. There were around 48% of marketers with 0-10 years and 31% with more than 10 years of experience. Mostly 19% have more than 20 years of experience in this field. A very few have the experience between 20 to 40 years of experience. The year of experience plays a significant role in their decision making so we took it as a variable for comparison.

Results & Discussion

The results were analyzed by using Microsoft excel 2013. There are various variables shown in the below table, showing the perspective of marketers on branding of healthcare product with a patient centric approach in pharma industry. Following are the analysis of the survey carried out earlier.

Graph-1; Years of experiences

We have divided our respondents based on their years of experience. There are around 53 pharma marketers with 0-10 years of experience in pharma industry. Along with those 29 respondents with 10-20 years of experience and the other left have experience more than 20 years in pharma market. So, why we have taken years of experience as an important variable because as the thoughts and views on patient centric approach differs with every marketer with a number of experiences.

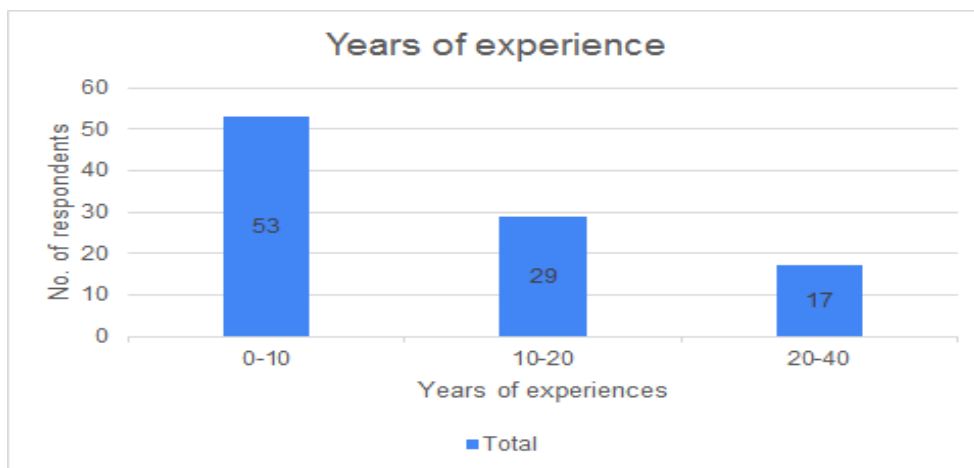


Fig. 1.1

Are experienced marketers being more adaptable to this approach? Or whether they consider it as a strategic approach or as a social business? Will see in our further responses.

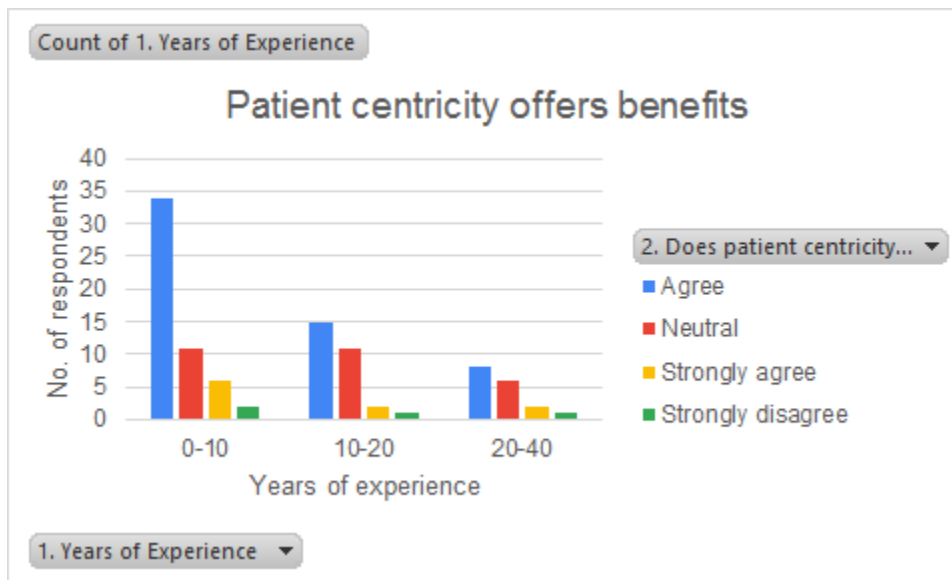


Fig. 1.2 Does Patient centrality offers benefits?

So, as we asked our respondents, the experienced pharma marketers. Most of them agrees the fact that, yes patient centrality offers benefits to the company. But as we move along in the graph, we can see that the few respondents also gave neutral response to this particular question. This means not every time patient centrality offers profits or benefits. It is also depending on the planning and execution of these strategies at a right time in a right manner.

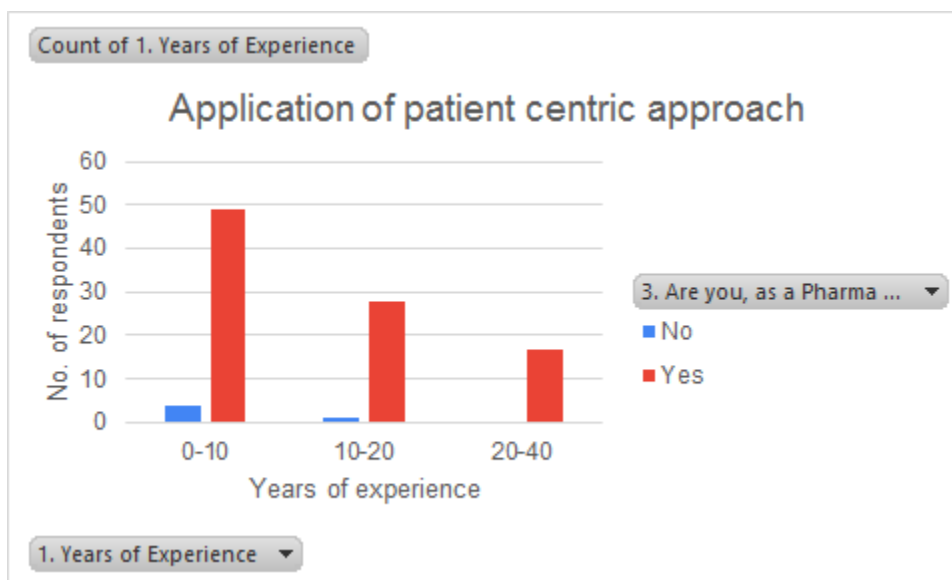


Fig. 1.3 Are you applying patient centrality at your organization?

50% agrees that they use patient centric approach in their organization. And very less number does not use patient centric approach in their organization. There can be number of reasons for not following it. It could be the budget of any organization, and the team members, how they accept it first? There is no doubt that by a patient centric approach will help you and your company to grow in the market. It will also create a good image in the minds of the doctors and patients both.

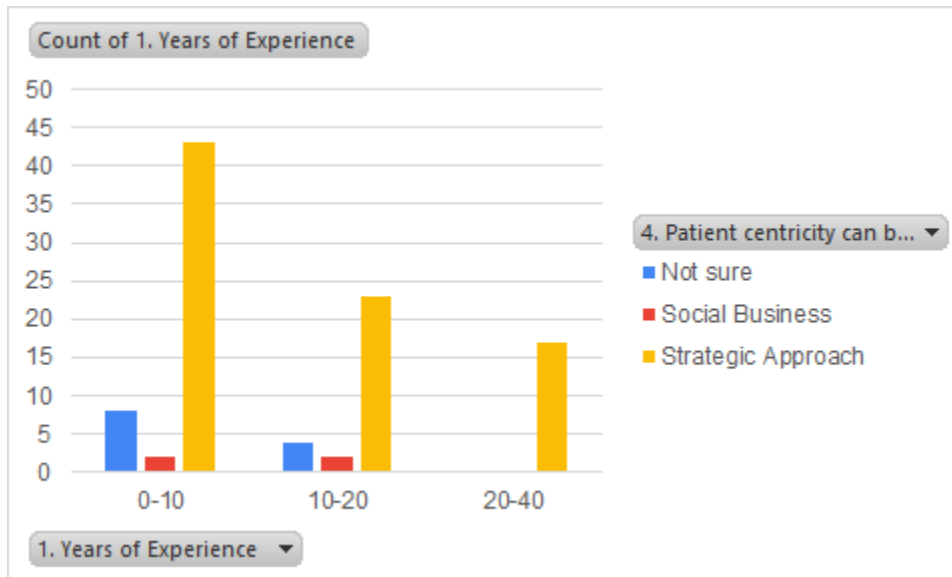


Fig. 1.4 Patient centricity can be a social business or strategic approach?

Here, most of the respondents agrees with the fact that patient centricity is a strategic approach and very less number agrees goes with social business option. If we investigate this, social business is different from strategic approach. In social business, a business which works with a specific social objective or goal as a primary purpose. It works with maximizing profits along with serving the society and environment. But, in strategic approach it involves setting objectives and analyzing the competitive environment internally and externally in both ways. Though we apply strategies in social business as well, just to achieve our objectives and goals. So according to me, patient centricity is both a strategic approach while doing a social business. Because here we are serving the needs of doctors and patients in market and in return, we are getting the profits and creating a brand image in the market. Patient support group can be used for evolving better outcomes.

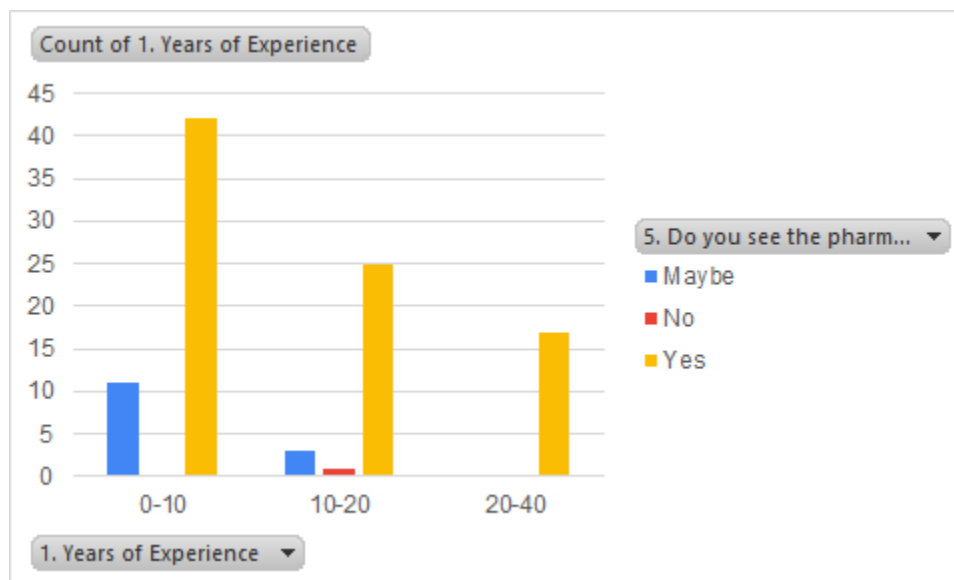


Fig. No. 1.5 Pharma industry developing the patient centric strategies for future.

As we can see that the answer is very well understood. 84 respondents in total have said yes to this question, whereas rest of the respondents are still confused with the fact that, this type of approach would be used in near future or not. But after doing a primary and secondary research with the help of literature reviews, we got to find that digital marketing is the new trend of marketing in every industry. So, with this comes the patient centric approach. As we all know that, nowadays everyone uses digital platforms for any information to grab. It is a more convenient way for every customer and consumer to go on and get any information needed. That is why pharma marketers will also and has already started branding their products online and along with a patient centric approach.

Conclusion

As we know that, the Indian Pharma industry has produced lots of new strategies in the market. Based on my primary and secondary research, I can conclude that patient centric approach while marketing your brand is important, or we can say humanizing services build trust because it taps into people's emotions. It will create a solution where everyone benefits including all the stakeholders present in the loop. And it is evident that the marketing strategies leaning towards digital platforms during this pandemic, which results in a more patient or consumer centric approach, because here we are addressing the problems of patients and doctors directly. With respect to the changes and challenges facing by the pharmaceutical industry during these pandemic times, it is important for these pharma companies to implement effective marketing strategies for their products to sustain for longer time. Hence, incredibly unique strategies should be implemented regarding promotion, packaging, etc. It is seen that; digital marketing is more of a patient centric approach. This can be done through numerous ways like videos, microsites, chatbots, etc. a patient centric approach is also very much important when it comes to healthcare marketing. Many pharma companies have some customized patient adherence activities for example, side effect management planning, confidential patient call review, and customized coaching guide. For patient centric approach, they go for virtual meetings, journals, articles, case studies, digital visual aids, etc.

Through this primary and secondary research data, a number of conclusions can be drawn firmly by made. At first, contemporary trends in branding of pharmaceutical brands through traditional marketing and digital marketing is quite challenging for the pharmaceutical industry. On the other hand, it has more become a patient or consumer centric marketing. We all know branding is a crucial tool for every pharmaceutical company. Marketers needs to understand that the products or say drugs they offer and to whom they are offering too. So, this message should need to convey effectively to their potential customers-consumers I.e., the Healthcare providers and patients. By making digital visual aids, microsites, and other effective communications activities this can be done. Marketers has to understand where the patient utilization drop offs and what is their root cause? They can collaborate across stakeholders groups such as the caregivers, patient, providers, payers to address adherence. By this they can maximize patient touch points at a critical stage in the patient journey to address drop off risks. This will enrich the patient experience. They can also go for patient feedback from patient adherence programs and create continuous improvement loop. Second, not just your potential buyers, but the marketers should also look after their companies' sales forces. There should be some motivational activities for the respective teams because they are the ones who are going to deal with your customers at the end. Medical reps CRM solutions, hybrid mobile apps for sales reps and advisory services for the sales reps, just in case if some doubt arises. In this way, healthcare companies are competing with best marketing practices and better branding styles to maintain their distinctiveness in the market.

By keeping a strategy for our patients, healthcare providers and last but not the list our sales forces, we can easily achieve our desired targets or goals for our organization.

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ANNEXURE

Primary Research Methodology:-

1. **Sample size** ;- 100 marketers of pharmaceutical industry.
2. **Survey instruments** ;- The survey contained 5 questionnaire items, with each item requiring response, and was intended to take roughly 2 minutes to finish.
3. **Sample segment** ;- Marketers of pharmaceutical industry
4. **Survey questionnaire** ;-

I am Divya Thakur, a student at IIHMR University. I am conducting this survey as part of my dissertation project, Under the guidance of Mr. Vivek Hattangadi (Chief Mentor, The Enablers). I am requesting you to take part in a study to know your views on "Patient - Centricity in Pharma Market".

Sir/Madam, I assure you that the information you give will be confidential and will not be known to any other person except me. I request for your co-operation to help a budding student.

Mail Id - divyathakur.j19@iihmr.in

I agree to participate –

1. Yes. 2. No.

1. Years of Experience
 - 0 – 10
 - 10 – 20
 - 20 – 40
 - Above 40
2. Does patient centricity offers any benefits to a pharma organization?
 - Strongly disagree
 - Disagree
 - Neutral
 - Agree
 - Strongly agree
3. Are you, as a Pharma Marketer using Patient - centricity approach?
 - Yes
 - No
4. Patient centricity can be considered as
 - Social Business
 - Strategic approach
 - Not Sure

5. Do you see the pharma industry developing its patient centric strategies for the future?

- Yes
- No
- Maybe