

## THE OFFENSIVE STRATEGY IN INDONESIA PHARMACEUTICAL MULTINATIONAL COMPANIES

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#### Abstract

This study aims to explore the reasons why multinational pharmaceutical companies in Indonesia implement offensive strategies. Data was collected through in-depth interviews with three key informants from three multinational pharmaceutical companies. The results of this study are: (1) The demand for sales targets is the reason why multinational pharmaceutical companies implement offensive strategies, (2) Special conditions, such as the Covid-19 pandemic which requires off-label drugs due to inadequate treatment line standards, are utilized by companies to implement offensive strategies resulting in increased sales, (3) New products require input from opinion leaders before being marketed.

**Keywords:** Offensive Strategy, Multinational Pharmaceutical Companies

### 1. INTRODUCTION

The pharmaceutical industry is characterized by capital-intensive, high technology, intensive market research and development, tight regulation, and fragmented markets (Maskur, 2019). Specifically, the pharmaceutical industry refers to companies that produce ethical drugs, namely prescription drugs, meaning that they can only be obtained using a doctor's prescription, and over-the-counter drugs, meaning that they can be obtained without a prescription from a doctor (Scherer, 2000).

Pharmaceutical companies in Indonesia consist of multinational pharmaceutical companies and national pharmaceutical companies. Multinational pharmaceutical companies are members of the IPMG (International Pharmaceutical Manufacturers Groups) organization and are non-profit organizations formed in 2002 and comprise 26 companies (Wicaksono, 2010). Meanwhile, national pharmaceutical companies are members of the Indonesian Pharmaceutical Companies Association, which consists of 178 private pharmaceutical companies and four

state-owned pharmaceutical companies, namely Indofarma, Kimia Farma, Bio Farma, and Phapros (Kemenperin, 2019).

Mubarok (2017) stated that in 2016 there was a significant increase in the number of multinational pharmaceutical companies from 24 companies in 2014-2015 to 35 companies. This shows foreign interest in Indonesia's high pharmaceutical market potential, driven by the National Health Insurance through the e-catalog system (Mubarok, 2017). In addition, research-based multinational pharmaceutical companies focus on drug patents, where the products produced are original drugs. In contrast, national pharmaceutical companies focus on me-too products, copycat drugs that imitate original drugs when their patents expire. For example, the patent period for paracetamol from one of the multinational pharmaceutical companies is 20 years. When the patent period expires, the national pharmaceutical company can imitate the product by adjusting the bioavailability<sup>1</sup> and bioequivalence<sup>2</sup> of the original drug.

The fragmented market structure in the pharmaceutical industry (Maskur, 2019) causes intense competition in the industry to win the market, so the right strategy is needed, such as attracting or acquiring new customers or acquiring customers called offensive strategies (Johnson, 2004; Yannopoulos Peter, 2011; Hooley et al, 2017). Offensive strategies encourage brand shifts and sales growth and the use of the marketing mix to create offensive strategies at a low cost (Erickson, 1993; Bridges & Freytag, 2008; Egboro, 2009). In addition, the dimensions of offensive strategies include new product development efforts, new or modified product launches, competitor orientation, and customer attraction programs (Heriyati et al., 2013).

Pharmaceutical companies attempt to gain new customers by promoting off-label (Abela & Murphy, 2008; David Bradford et al., 2018), one of the applications of offensive strategies. Shojaei & Salari (2020) asserted that during the Covid 19 pandemic, using off-label drugs was part of marketing promotion, which most doctors were unaware of. Nevertheless, off-label drugs are needed for medical reasons with the aim of patients getting the best service to cure their disease. Hence, prescription off-label drugs are also entirely the doctor's responsibility. The main reasons for the need for off-label drugs are the inability of the standard line of treatment to treat the disease (58%), the lack of approved alternative drugs (43%), and the presence of rare tumors (47%) (Saiyed et al., 2017).

There needs to be more literature on the concept of offensive marketing strategies (Fornell, 1987; Byod, 1996; Johnson, 2004; Kotler, 2012). The use of off-label drug as an offensive strategy. This is a gap phenomenon regarding off-label drug use as an offensive strategy. Studying why multinational pharmaceutical companies in Indonesia implement offensive strategies is interesting.

## **2. LITERATURE REVIEW**

### **2.1. Global Marketing Strategy**

Multinational companies can offer global products that are functionally standardized and reliable (Leavitt, 1983). In addition, the global marketing strategy pumps on standardization

that creates a single market with low costs due to the uniformity of customer demand (Vrontis, D & Thrassou, 2007).

Viswanathan, N & Dickson (2006) have a different opinion that each country has different market characteristics, so global marketing strategies are developed according to market conditions in a country that is a target market, often referred to as adaptation of marketing strategies. Global marketing has three perspectives: standardization, configuration-coordination, and integration. The perspective of coordination-configuration and integration focus on competitiveness, while the perspective of coordination-configuration focuses on the global value chain to create a competitive advantage through efficiency. According to the integration perspective, competitive advantage is created by improving the efficiency and effectiveness of global marketing.

## **2.2. Offensive Strategy**

### **2.2.1. Definition of Offensive Marketing Strategy**

Buzan & Lawson (2016) state that the primary strategy for achieving growth is aggressively pursuing product market opportunities. Meanwhile, Fornell (1987) states that the offensive strategy seeks to gain additional consumers, encourage brand switching and increase purchase frequency. The success of an offensive strategy is measured by the number of new customers gained by the company at the expense of competitors (Byod, 1996). Steenkamp et al (1999) assert that the success of an offensive strategy is to win over competitors through promotion, price or advertising, and other marketing instruments, such as new product launches. Offensive Marketing Strategies, including direct and indirect, aim to improve competitive position and take competitors' market share or move into new markets to avoid powerful competitors. Indirect attacks tend to cause a competitive response because they are challenging to detect, mainly if targeted at non-core segments or products (Yannopoulos, 2011). While, Hooley et al (2017) suggest two types of offensive strategies:

#### **2.2.1.1. Bypass Strategy**

A bypass attack is the most indirect attack on a competitor, similar to a cold war. This type of attack includes marketing which can manifest as diversification in unrelated products or entering new markets with existing products (Kotler, 2012). The bypass strategy is characterized by changing the battlefield to avoid a competitor's stronghold. Crossing attacks are often achieved through technological leaps.

#### **2.2.1.2. Frontal Attack**

In a frontal attack, the challenger attacks the leader's front line with full force. The goal is not the weak side but the strong side of the competitor. For this strategy to be successful, the attacker must have an absolute advantage over his competitors (Kotler, 1997). The success of a frontal attack requires adequate resources, a strength advantage over the competition being attacked, and losses are predictable and defensible (Hooley et al, 2017).

A genuinely pure frontal attack is looking for customers from competing companies through the same product, price, promotion, and distribution. However, this attack is hazardous unless

the attacker has a competitive advantage that competitors do not have. If a competitor offers the same product in quality and features, but a lower price, then such a frontal attack is price-based (Yannopoulos, 2011).

### 3. METHODOLOGY

#### 3.1. Qualitative Method

The deductive research technique is critical in assisting the researchers in keeping the data within suitable boundaries. This generic information is also correctly specified based on the research subject. The qualitative research design is crucial in the research process since it aids in determining the aims of the research process (Altarawneh & Tarawneh, 2023).(Altarawneh & Tarawneh, 2023).

This is confirmed by Sekaran & Bougie (2010), that qualitative research is exploratory, which is carried out when the situation to be studied is not widely known. Qualitative research follows an inductive process from data in the field to the construction of theories based on the processes of interaction between individuals, looking at the specific contexts in which people live and work (Ihalauw, 2014).

#### 3.2. Research Design

The qualitative research design used in this study is an embedded multiple case study (Yin, 2011), allowing researchers to explore actors who carry out managerial and operational functions as research objects in three multinational pharmaceutical companies carrying out offensive strategies.

#### 3.3. Key Research Informants

The critical informants required are people who are involved in the pharmaceutical industry as follows:

**Table 1: Key Informant's Position**

No	Key Informant	Position	Multinational Pharmaceutical Companies (MCP)
1	A1	Country Medical Lead	X1
2	B1	Country Brand Manager	X2
3	C1	National Sales Manager	X3

Identify key informants by level in an organization in the multinational pharmaceutical industry focusing on prescription products.

## 4. RESULTS

### 4.1. Categories and Frequency Grouping

The results of interviews with 3 respondents obtained categories and frequency, shown in table 2:

**Table 2: Category and Frequency**

No	Category	Freq	No	Category	Freq	No	Category	Freq
1	Customer engagement	2	9	Key message	3	17	Improve sales performance	3
2	Customers do not always use the company's products by the messages conveyed by the marketing and health team verbally and in writing or through promotional materials	3	10	Products are registered and available in hospitals or clinics	3	18	Market share	2
3	Customer focus	3	11	Product cost-effectiveness	2	19	Competitors	3
4	Joint visit	3	12	Reward effectiveness	1	20	Market access	3
5	Market analysis	3	13	Third party	3	21	Biotechnology products	3
6	Market potential	1	14	Promotional materials	3	22	Value proposition	2
7	Ability of customers to prescribe drugs	3	15	Detailing equipment	2	23	Providing the latest scientific information on therapies or products	3
8	Prevalence of the disease	2	16	Scientific meetings	3	24	Black campaign	1

Source: Primary data, 2021

Next is to see if there are categories with the same phenomenon, so it is necessary to reclassify them. In Table 2, there are 28 categories that can be seen in common, so the category reclassification is obtained in Table 3:

**Table 3: Category Reclassification**

No	Kategori	Freq	Reklasifikasi Kategori
1	Customer engagement	3	<b>Co creation value</b> a) Customer engagement b) Customers do not always use the company's products by the messages conveyed by the marketing and health team verbally and in writing or through promotional materials c) Customer focus d) Joint visit
2	Customers do not always use the company's products by the messages conveyed by the marketing and health team verbally and in writing or through promotional materials	3	
3	Customer focus	3	
4	Joint visit	3	
5	Market analysis	3	<b>Dynamic marketing capability</b> <b>A. Market sensing capability</b> a) Market analysis b) Market potential c) Ability of customers to prescribe drugs d) Prevalence of the disease e) Products are registered and available in hospitals or clinics <b>B. Learning ability</b> a) Key message b) Value proposition
6	Market potential	3	
7	Ability of customers to prescribe drugs	3	
8	Prevalence of the disease	2	
9	Value proposition	2	
10	Key message	3	
11	Products are registered and available in hospitals or clinics	3	
12	Product cost-effectiveness	2	
13	Reward effectiveness	1	
14	Biotechnology products	3	
15	Third party	3	
16	Promotional materials	3	<b>Marketing capability</b> <b>A. Product and service management capability</b> a. Reward effectiveness b. Reward cost effectiveness c. Produk bioteknologi <b>B. Distribution capability</b> a. Third party <b>C. Advertising, promotion, and selling skills</b> a. Promotional materials b. Detailing equipment c. Scientific meeting d. Providing the latest scientific information on therapies or products
17	Detailing equipment	2	
18	Scientific meetings	3	
19	Providing the latest scientific information on therapies or products	3	
20	Market access	3	<b>Marketing assets</b> a. Market access
21	Market share	2	<b>Offensive strategy</b> a. Market share b. Black campaign c. Improve sales performance d. Competitor
22	Black campaign	1	
23	Improve sales performance	3	
24	Competitor	3	

Source: Primary data, 2021

#### 4.2. Emerging Patterns

Category reclassification is used as the basis for compiling emerging patterns as follows:

**The co-creation value** is critical to the success of a business, which can be done through joint

visits between sales representatives and their supervisors (area managers, product managers, sales managers) or from the medical department (medical advisors) to their customers.

Even though the joint visit is focused, customers only sometimes use the product following the message conveyed, meaning that customers use the product outside the indication of the recommended drug.

This is related to the customer's needs regarding their patient needs and the customer's clinical experience. However, this is often used by the medical and marketing departments of the company to persuade customers to prescribe products that are not according to indications because of the demands of sales targets that must be met, thus creating customer demand.

**Dynamic marketing capability** is the capacity to understand what is happening in the external environment concerning the ability to analyze the market, market potential, the ability of customers to prescribe drugs, drug content, and the ability of the marketing department to register and supply products to clinics and hospitals.

The processes that enable companies to recognize the value of new information in the market and try to digest it include value promises and critical messages.

Often the value promise is only sometimes well received by customers. This can be related to the drug content or the clinical experience of the customer.

**Marketing capability** is a process that is reflected through marketing assets. In this case, product and service management capabilities are reflected through reward effectiveness or product cost-effectiveness, reflecting minimal and effective therapy costs for patients using biotechnology products.

Ability to use new distribution channels and build new ones to serve customer needs, for example, through third parties.

Effective communication with current or future customers can take many forms, such as promotional materials, detailing kits, scientific meetings, and providing the latest scientific information on therapies or products.

**Marketing assets** are resources that the company builds and acquires over time, for example, access to the market, i.e., partnerships with distributors that can open up entry to the market.

**The offensive strategy** aims to improve performance by increasing market share and sales, which can be done by finding new customers or gaining customers from competitors. In addition, offensive strategy is becoming a winner in an industry over its competitors.

## 5. DISCUSSION

### 5.1. Reasons why multinational pharmaceutical companies in Indonesia implement offensive strategies

From the interviews, the informants confirmed that achieving sales targets is the ultimate goal of the marketing department's performance. If the sales target is not achieved, it becomes an

evaluation for the marketing department whether the marketing strategy used to achieve the sales target is by the conditions in the field. This means that sales target demands are essential for the marketing department.

This is reinforced by the results of the category reclassification in Table 3, which is confirmed by the informants that customers do not always use the company's products in accordance with the messages conveyed by the marketing and health team, either verbally and in writing or through promotional materials. Informant B1 confirmed:

"There are also customers who want to prescribe products outside the indication. How about that? It is the customer's decision. Clinically they know better if I follow the procedure. It is important to be close to them, and sales are achieved."

This means that there is an opportunity to prescribe off-label drugs that companies utilize to improve sales performance. This is called frontal attack (Yannopoulos, 2011; Heriyati et al., 2013; Hooley et al, 2017).

The informants confirmed that scientific education to customers is a scientific gap for the marketing department to determine customers' needs in providing the best therapy for their patients. Suppose there is an advantage of the product owned by the company and a weakness of a competitor's product. In that case, the marketing department will try to be scientific to convince customers to use its product, even if it is off-label, because of the demands of sales targets that must be achieved. In addition, table 3 of the category reclassification results show that the ability of customers to prescribe drugs is a consideration for achieving sales target demands. Informant C1 stated this:

"Propensity, or the ability of customers to prescribe our products, should be noted. For example, if the market potential is high, but the propensity is low, we should persist and find ways to increase the prescription. In the end, it is sales."

This means that there is an offensive strategy in the form of a frontal attack because the company utilizes the ability of customers to increase prescribing.

In addition to the demands of sales targets, the condition of the Covid-19 pandemic, which causes respiratory problems and pneumonia, is a separate reason for customers to prescribe off-label drugs. This is driven by the absence of drugs that can cure patients of these diseases. Informant A1 stated that:

"The tendency is more to the doctor's initiative to modify the therapy because, at that time, the therapy for Covid-19 did not yet exist, but we all know that the main symptom of Covid-19 is shortness of breath, which is related to the lungs. So the ultibro<sup>3</sup> was tried on Covid-19 patients because he knew the drug's mechanism of action. Of course, it could open the airway to bigger, so it was tried on his patients or biotechnology products could be used to open the airway."

This means that there is a diversification of products used for other indications. Multinational pharmaceutical companies utilize this as an offensive bypass strategy.

Then informant C1 emphasized that:



"Even Ultibro's sales during the pandemic were growing at 15% per month".

It means that multinational pharmaceutical companies implemented offensive strategies during the pandemic to increase sales growth.

Saiyed et al (2017) state that one of the reasons for the need for off-label drugs is that the standard line of treatment can no longer overcome the disease. While Mulyani (2018) added that the use of off-label drugs is usually used for vulnerable populations, for example, drugs licensed for indications that cannot be used (rare diseases), there is limited evidence of the safety and efficacy of off-label drug use, but companies are reluctant to license them. It is not illegal to prescribe off-label drugs rather than leave patients without proper treatment. This is supported by Zheng et al (2017), who stated that if there is no substitute drug to treat the patient's condition, using off-label drugs is the best option for the patient and has more significant benefits.

Furthermore, another reason for multinational pharmaceutical companies to implement an offensive drug-on-label marketing strategy is the existence of new products that are about to be launched in the market and have yet to be approved by the government authorities, such as BPOM. Thus, conducting clinical trials for customers in some therapeutic regions is necessary.

This was emphasized by informant A1 who stated that

"Before a new product is launched to the market, it needs clinical trials and support from opinion leaders. What insights can we get from them for our products."

Furthermore, informant A2 added:

"It depends on what the product profile is. It does not mean we will influence the doctor. Our good product must be approved, which is different from that, but we want to get their insight about our product. At least they want to do a clinical trial for our product."

New products in multinational pharmaceutical companies are a form of product diversification categorized as a By-Pass Strategy.

Although drug-on-label marketing is an attempt to gain additional consumers, encourage brand switching, and increase purchase frequency or what is called an offensive strategy (Steenkamp et al., 1999; Yannopoulos, 2011) and is an indirect promotion (Meadows & Hollowell, 2008). However, more than that, drug-on-label prescribing occurs due to special conditions, such as pandemics, severe life-threatening conditions, or inadequate standards of treatment lines (Zheng et al., 2017; Mulyani, 2018), so it is tolerated, especially in some medical areas (Casali, 2007). In addition, there are new drugs or the addition of new indications to increase patent value (Kmietowicz, 2009; Tanne JH, 2010).

## **6. CONCLUSION, LIMITATION AND FUTURE RESEARCH**

### **6.1. Conclusion**

Multinational pharmaceutical companies implement offensive strategies in the form of the By-Pass Strategy. This marketing strategy can manifest itself as diversification in unrelated

products or entering new markets with existing products and frontal Attack, which is related to the competitive advantages possessed by the company. The demand for sales targets is one of the reasons why multinational pharmaceutical companies implement offensive strategies. In addition, pandemic conditions such as Covid 19 are a separate reason because the standard of treatment lines is no longer adequate, so it is tolerated for patient safety. In addition, new products require insight from opinion leaders to conduct clinical trials.

## 6.2. Limitation

First, not all multinational pharmaceutical companies that are members of the IPMG (International Pharmaceutical Manufacturers Group) are the object of this research due to limited access and funds.

Secondly, interviews with sources were conducted online due to the pandemic situation and limited funds from researchers, but information from sources can be supplemented with secondary data from the website.

## 6.3. Future Research

First, this research is limited to sources from multinational pharmaceutical companies, so research that includes references from local pharmaceutical companies is needed.

Second, data triangulation is limited to informants from multinational pharmaceutical companies, so data triangulation for doctors and patients is needed.

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