



# PAAB 2019 Customer Insight



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This report was researched and created by CreateHealth.io. The research will repeat in November to help PAAB benchmark their progress and capture the needs of the industry in a consistent way.

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**For:** Patrick Massad | Acting Commissioner | Pharmaceutical Advertising Advisory Board

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# Contents

<b>Executive summary</b> .....	<b>3</b>
<b>Introduction</b> .....	<b>4</b>
<b>Industry trends</b> .....	<b>5</b>
<b>Budget allocation</b> .....	<b>6</b>
<b>Product promotion</b> .....	<b>7</b>
<b>PAAB insight</b> .....	<b>8</b>
<b>PAAB reviewers</b> .....	<b>10</b>
<b>PAAB tagging</b> .....	<b>12</b>
<b>Education from PAAB</b> .....	<b>13</b>
<b>Perceptions of trust</b> .....	<b>17</b>
<b>Verbatim</b> .....	<b>18</b>
<b>Appendix</b> .....	<b>20</b>

# Executive summary

The 2019 industry benchmark set out to understand:



1

The key challenges and learning needs of Canadian pharmaceutical companies and their associated agencies.



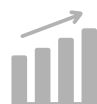
2

Perceptions and insight on key areas of the PAAB and the service it provides for Canadian pharmaceutical companies and their associated agencies.

128 people completed an online survey in **March**, 2019.

The survey consisted of 23 questions made up of open and closed questions.

**The main findings from the survey illustrated that:**



The biggest trends for pharmaceutical companies in 2019 is:

- **Accessing HCPs via digital marketing & Artificial Intelligence**
- **Increase in patient engagement & support materials**
- **Changes in regulation that impacts communication**



Respondents would like more on and offline learning opportunities from PAAB. With learning content focusing on digital tools.



**Marketing via on and offline channels** is the top area of investment of respondents in 2019.



**Trust** received average scores. When asked if pharmaceutical companies are trusted by doctors and patients, respondents provided an average score of **5.7** out of 10.



The biggest PAAB related learning need for respondents was to increase on and offline learning opportunities.

# Introduction

128 people completed an online survey between March to April, 2019.

Respondents took on average 17 minutes to complete the survey

91% of people completed the survey via a PC or Laptop.

The remaining 9% completed via a smartphone.

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## People were invited to the survey through 3 digital campaigns:

- **Direct email** from the CreateHealth.io & PAAB client database which consists of approximately 4,000 Canadian industry and agency executives. This list represents all IMC members.
- A **LinkedIn** announcement to the PAAB group, reaching 1,900 people. An audit of this group has not been taken and their role/remit and location can not be confirmed.
- The insertion of a **pop-up** window on the PAAB.ca website inviting people to sign-up.

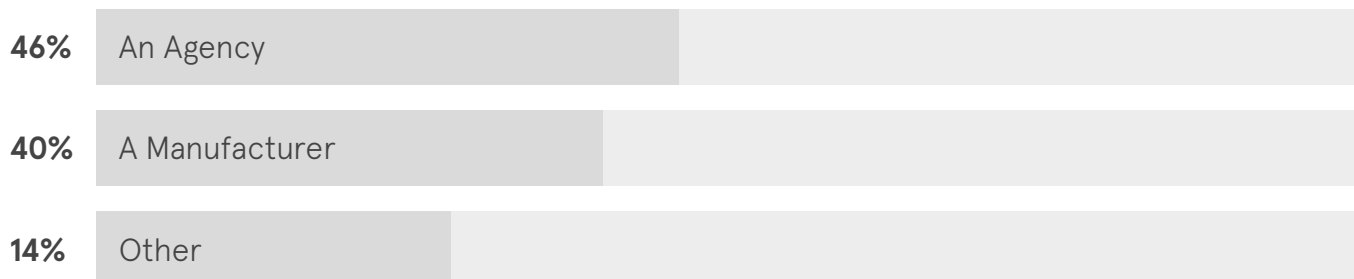
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Individual participant outputs remained anonymous. Aggregated data has been analyzed to form this report. To prevent any unintentional identification of an individual or company, some comments have been edited.

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## Area

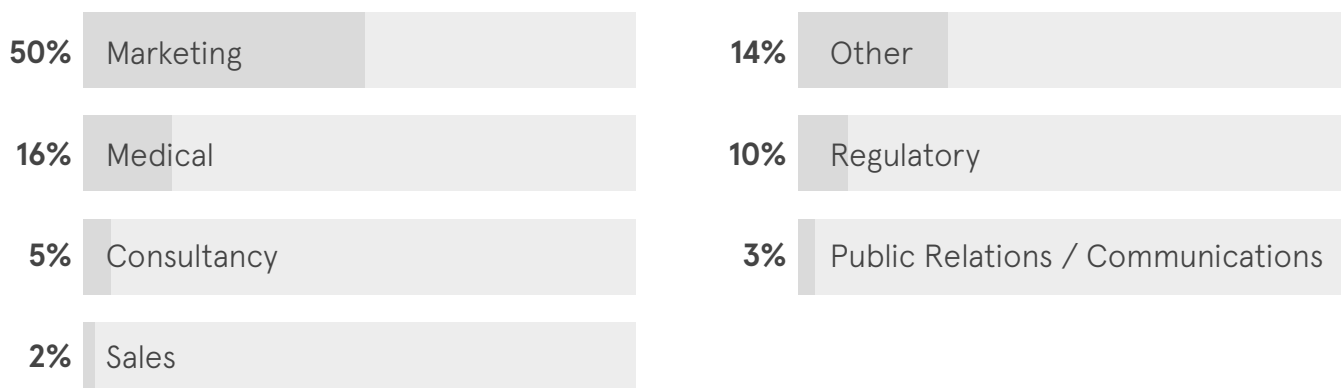
n=128



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## Role type

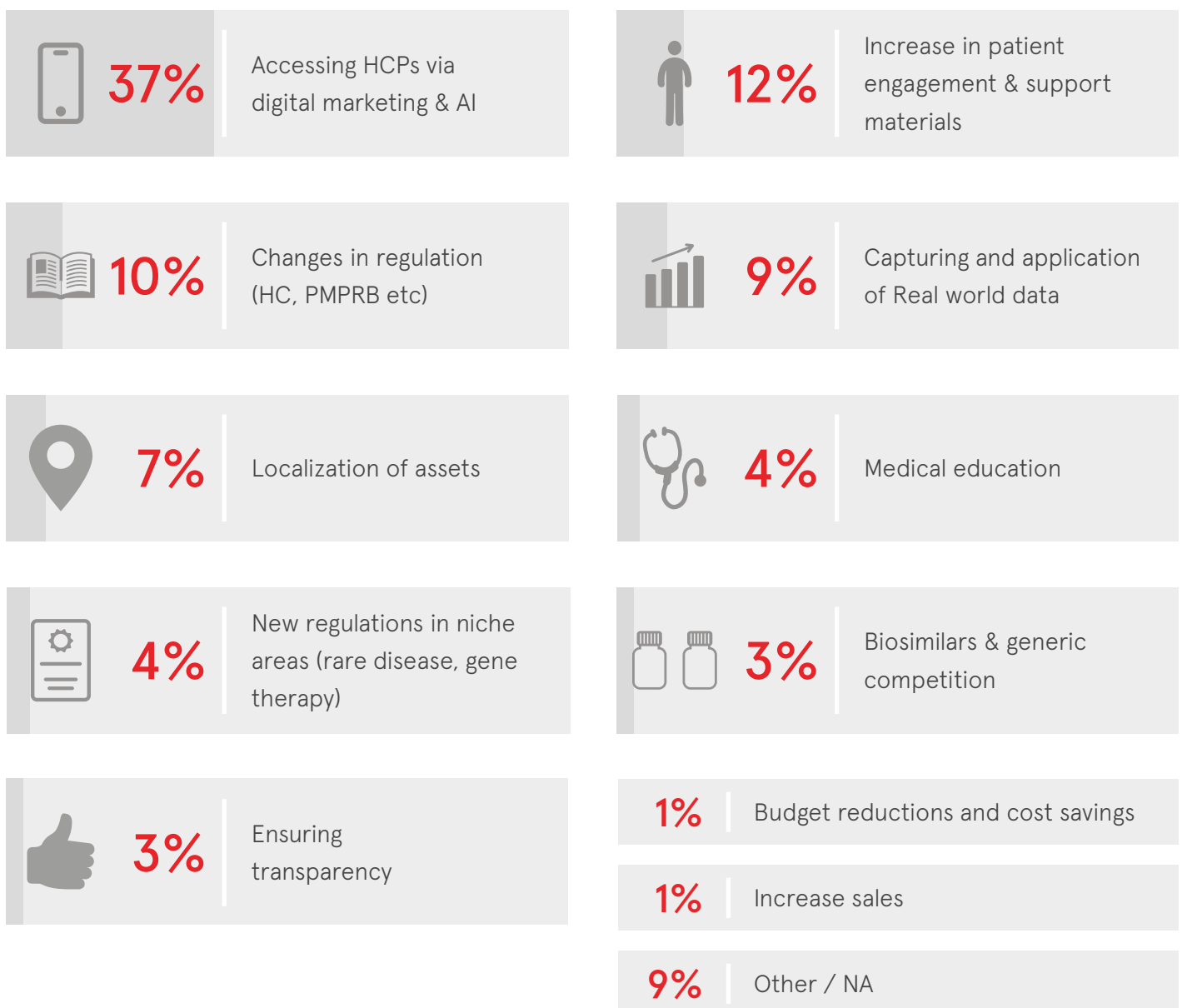
n=128



# Industry trends

Data captured for via an open text box. Comments were then grouped to the below themes. Engaging HCPs via digital continues to be a top priority for respondents. Verbatim comments illustrated similar comments towards: "finding ways to reach customers in crowded digital channels" ... "how to increase opportunities via social media" ...

## What trends do you see being of high importance for pharma companies this year?



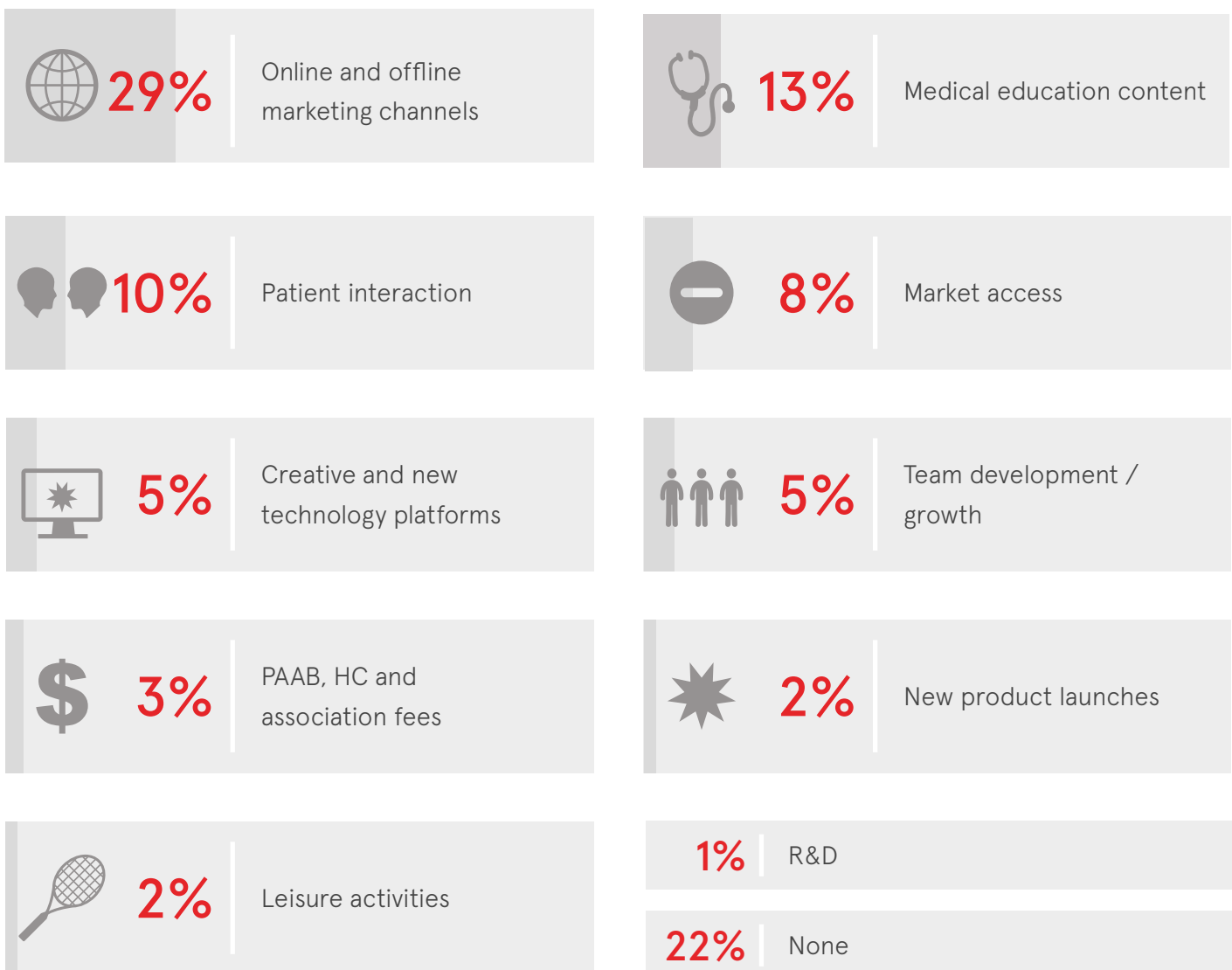
n=115

Some answers were omitted as they could not be categorised.

# Budget allocation

Data captured for via an open text box. Comments were then grouped to the below themes. The commentary aligns with the previous question on the respondents perception of trends.

## Where will you or your team allocate the majority of the budget in 2019?



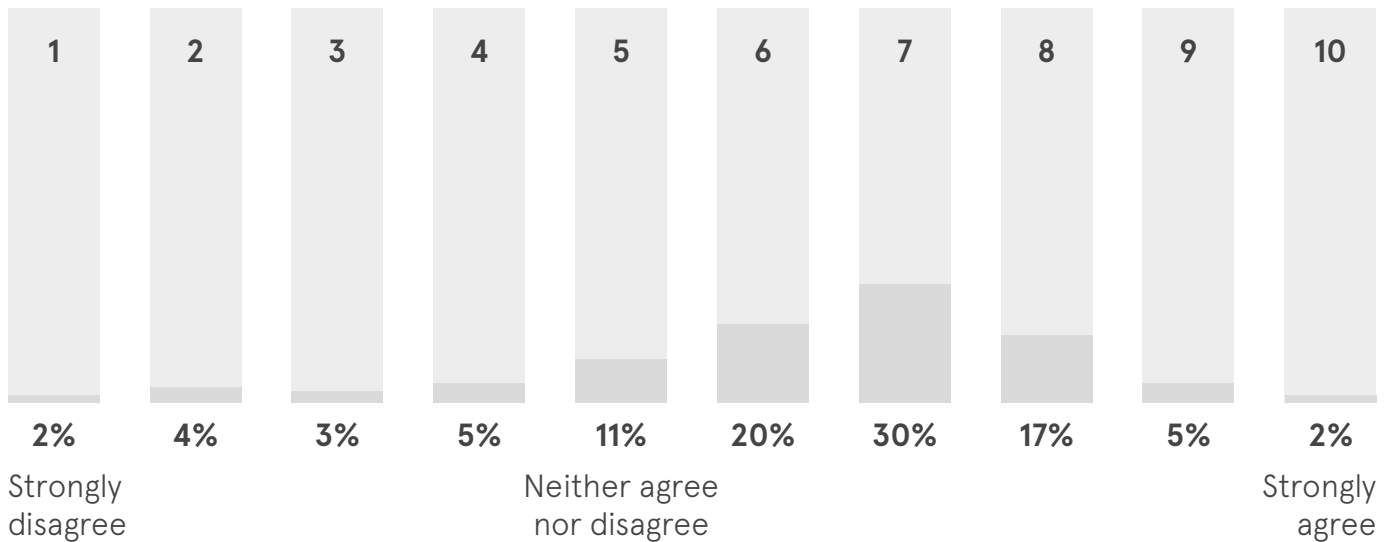
n=115

Some answers were omitted as they could not be categorised.

# Product promotion

Canadian pharmaceutical companies do a good job in promoting their products and services.

Avg.  
6.3

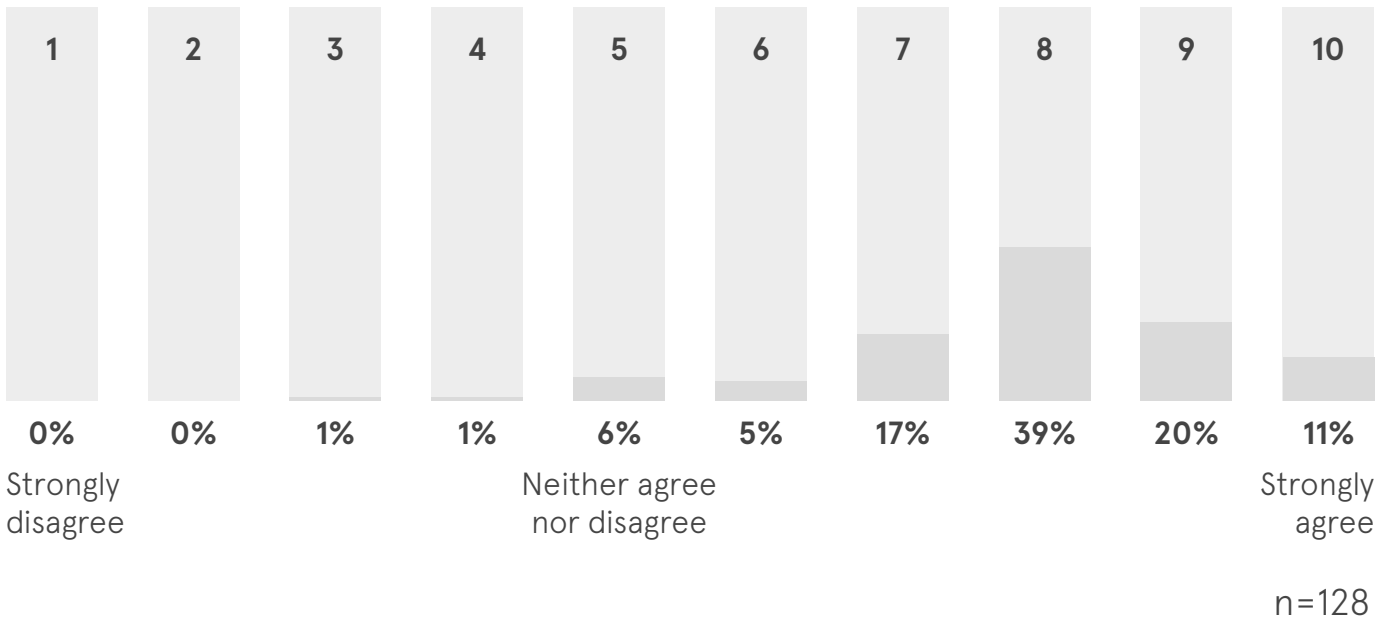


n=128

# PAAB insight

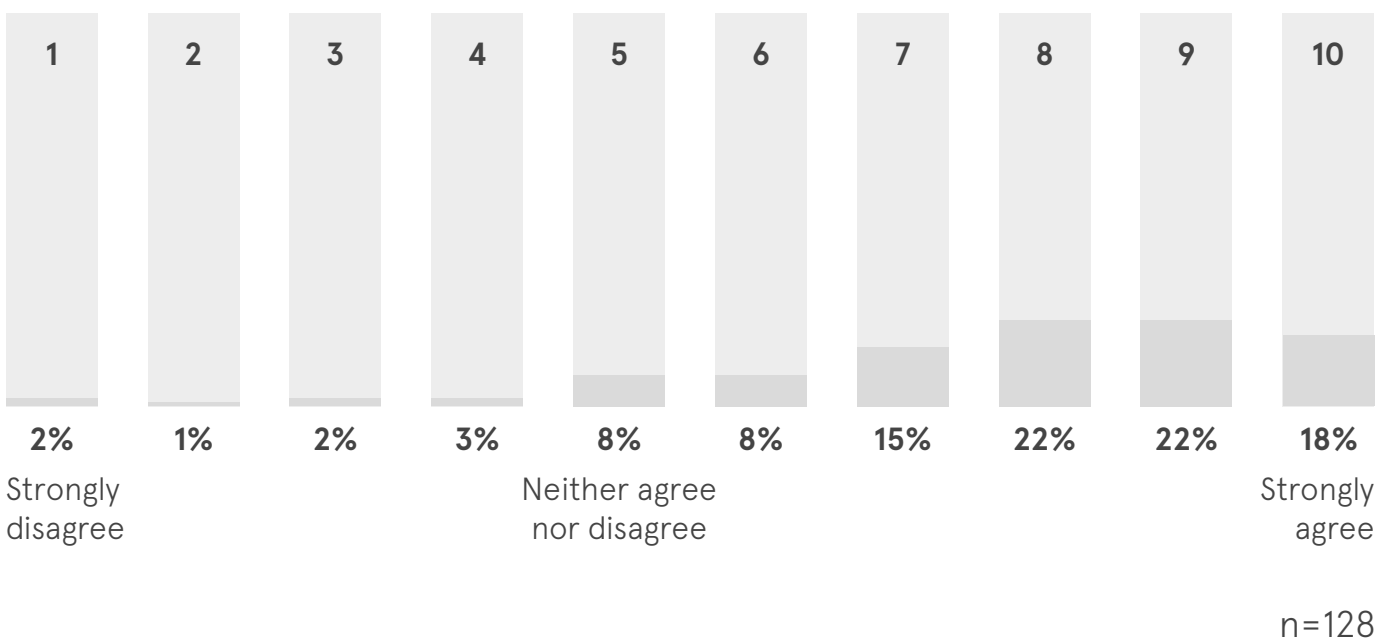
I consider myself to be knowledgeable on the application of the PAAB Code.

Avg.  
7.9



PAAB maintains the construct of a self-regulatory environment without perception of industry bias.

Avg.  
7.6

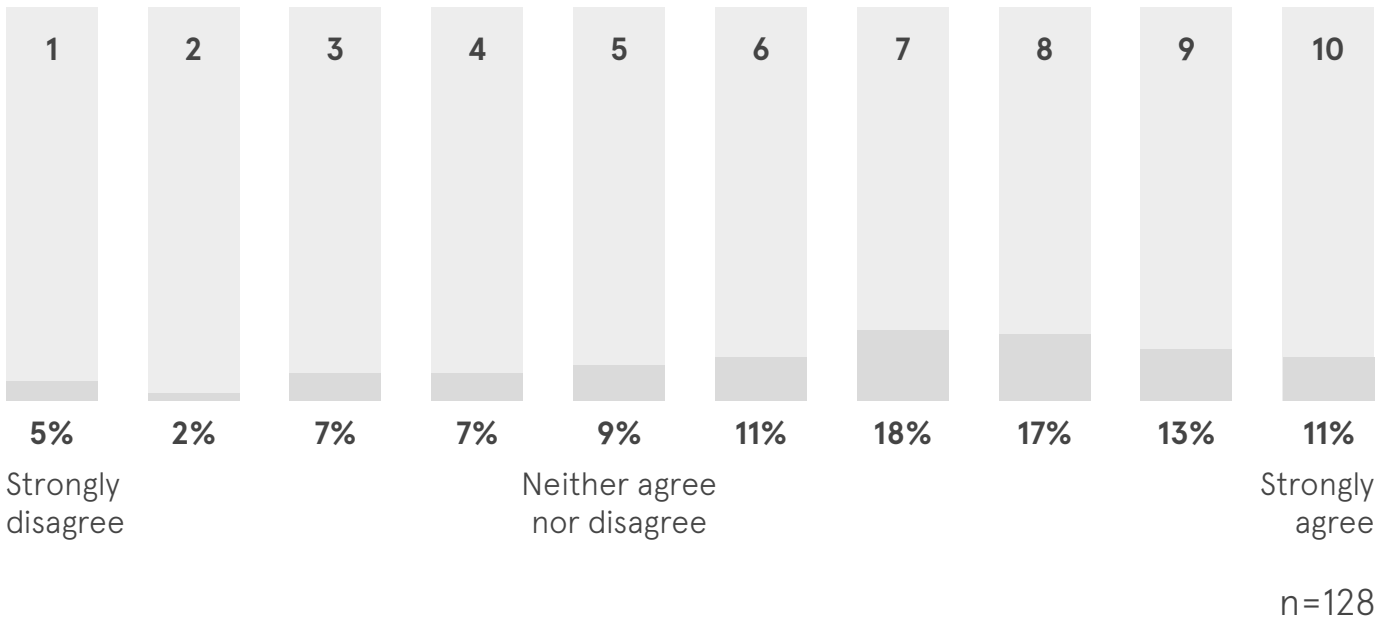




# PAAB insight

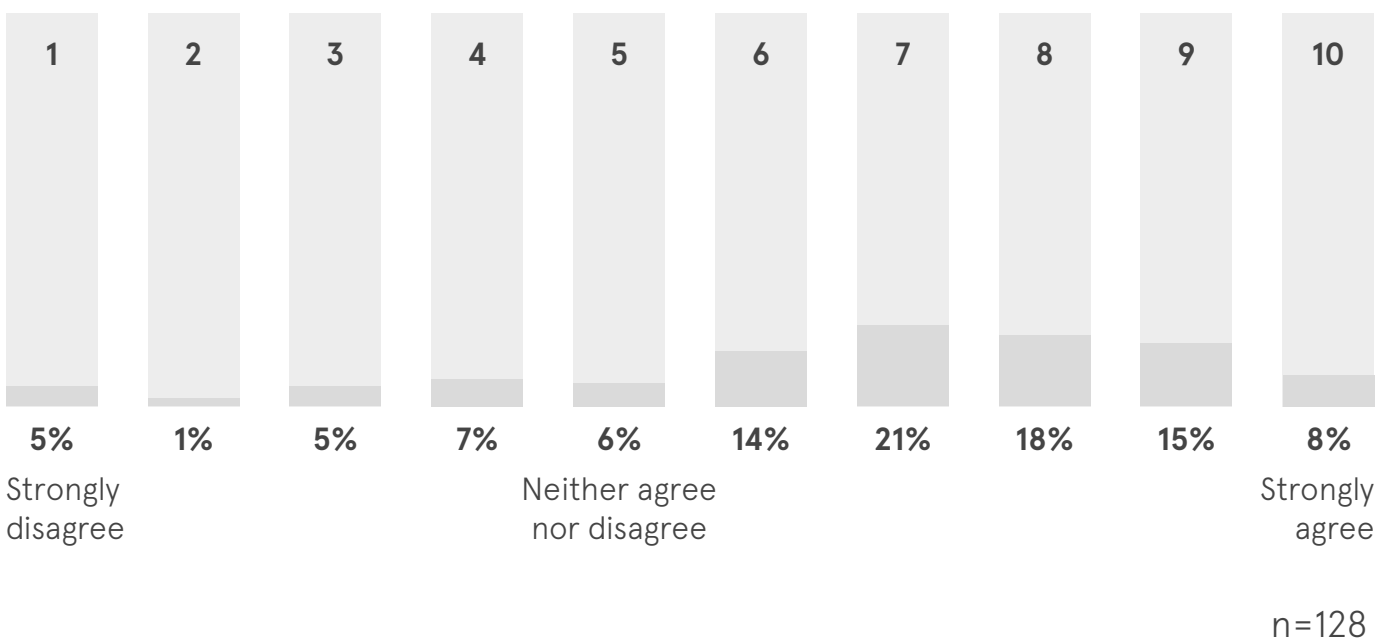
PAAB is a model organization for independent review agencies operating in a regulatory environment.

Avg.  
6.6



I value the PAAB as a source of knowledge and support for trustworthy health product communication.

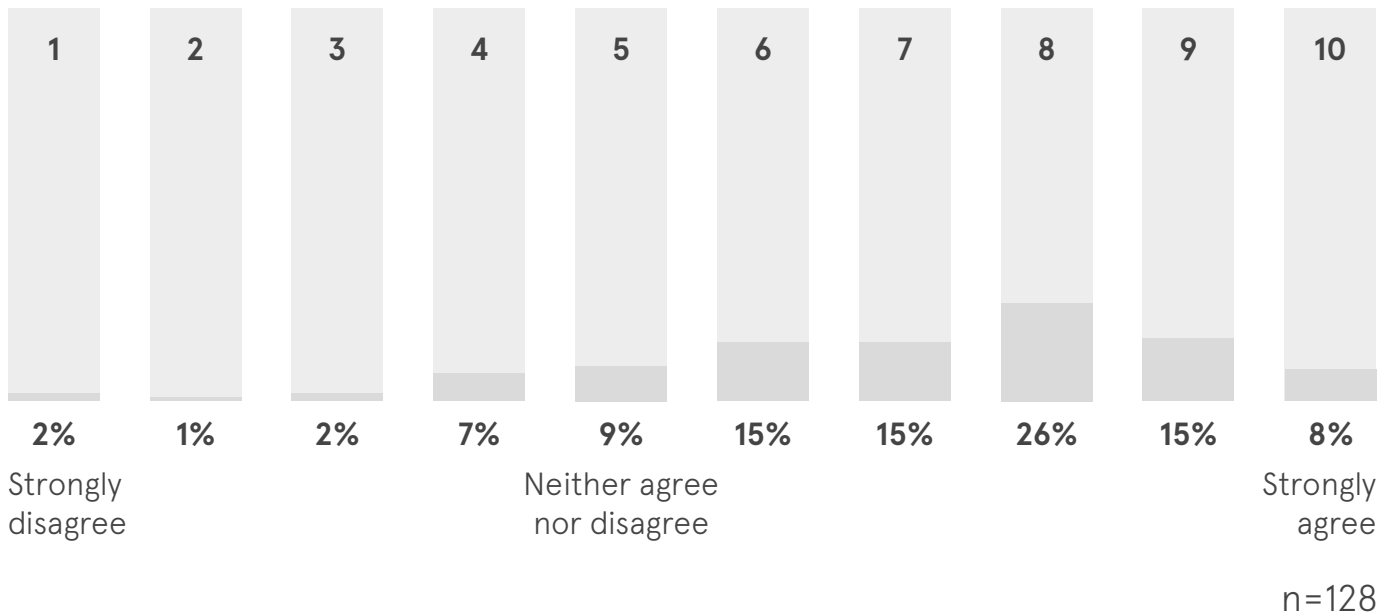
Avg.  
6.7



# PAAB reviewers

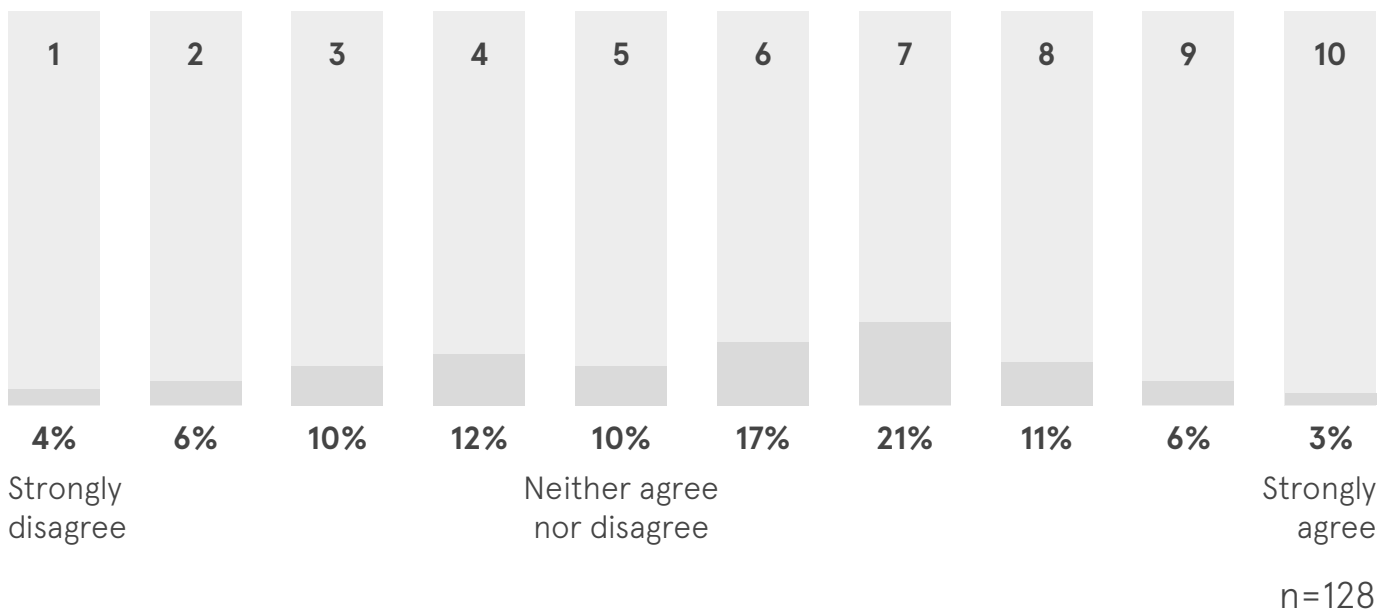
PAAB reviewers make themselves available for questions and discussions regarding PAAB submissions, providing valuable information.

Avg.  
7.0



PAAB reviewers assist with finding solutions to challenges with submissions.

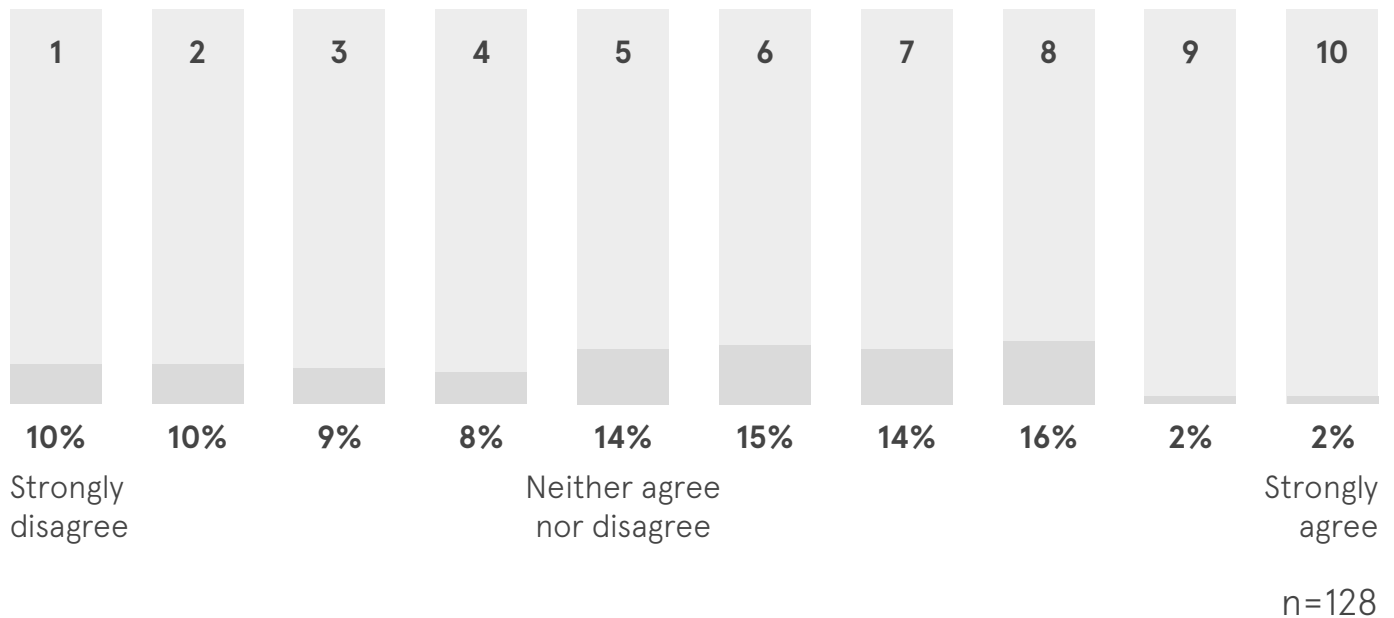
Avg.  
5.7



# PAAB reviewers

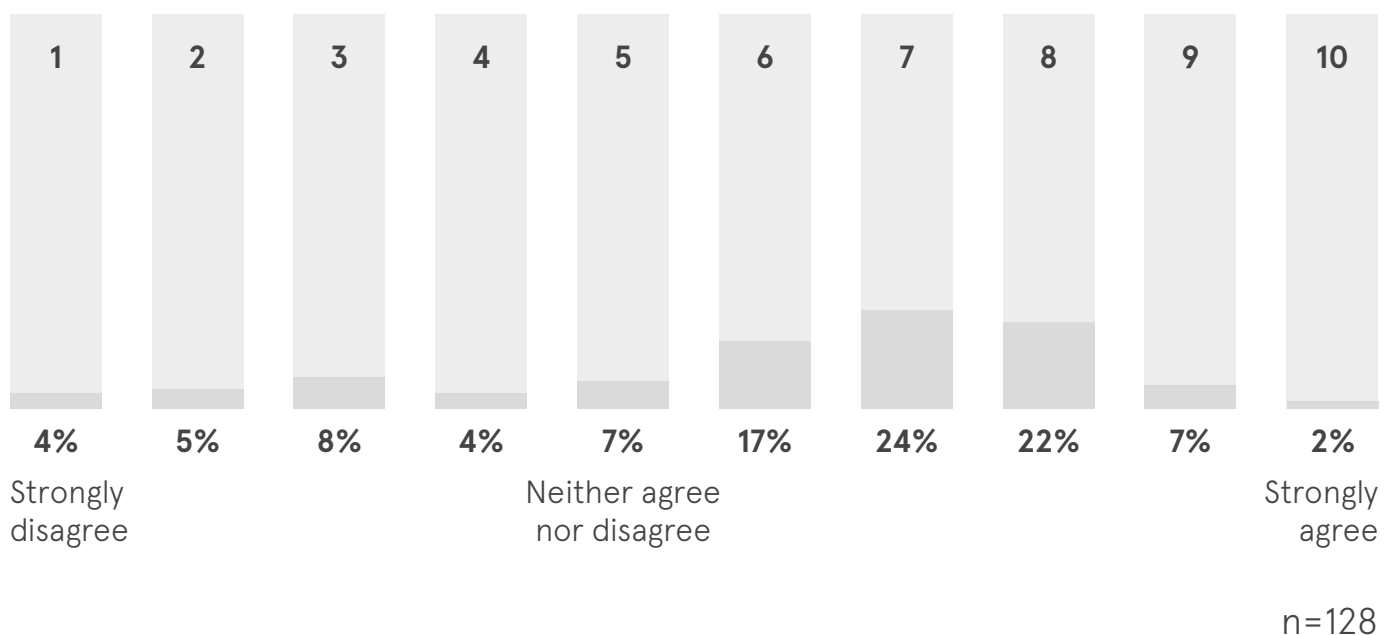
The PAAB Code is generally interpreted similarly between reviewers, and from one material submission to the next.

Avg.  
5.1



Commentary received by PAAB reviewers in response to the first submission is complete and thorough.

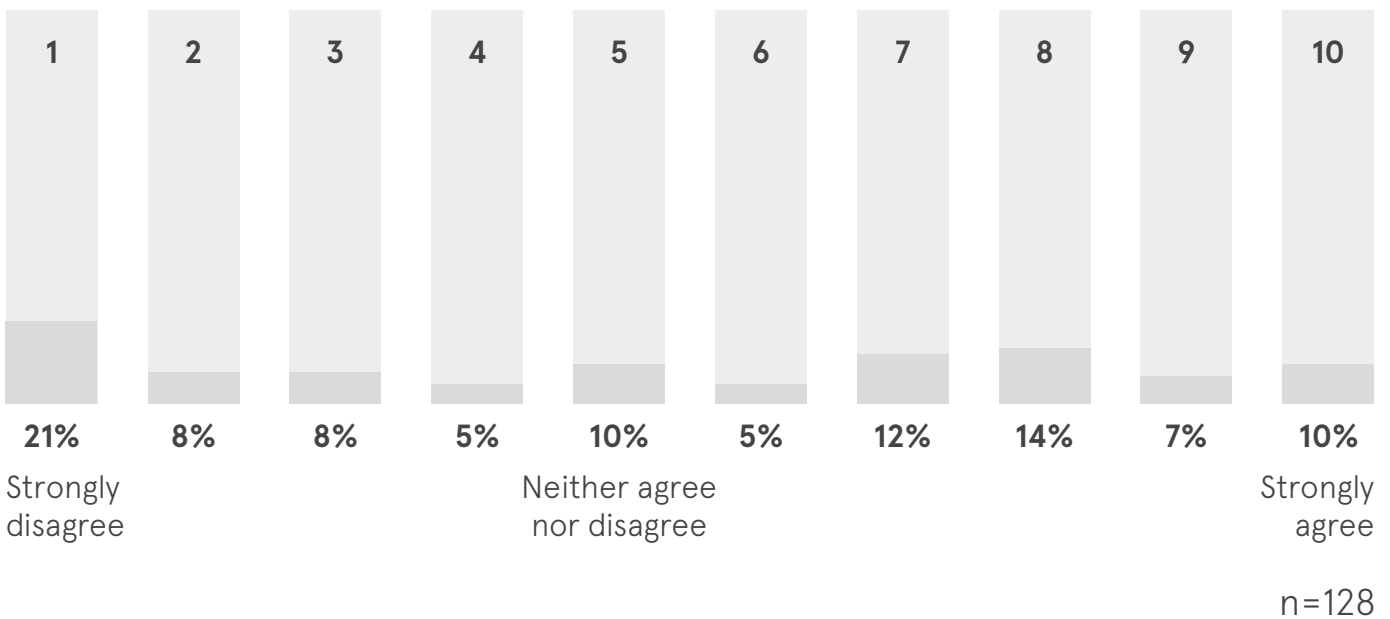
Avg.  
6.3



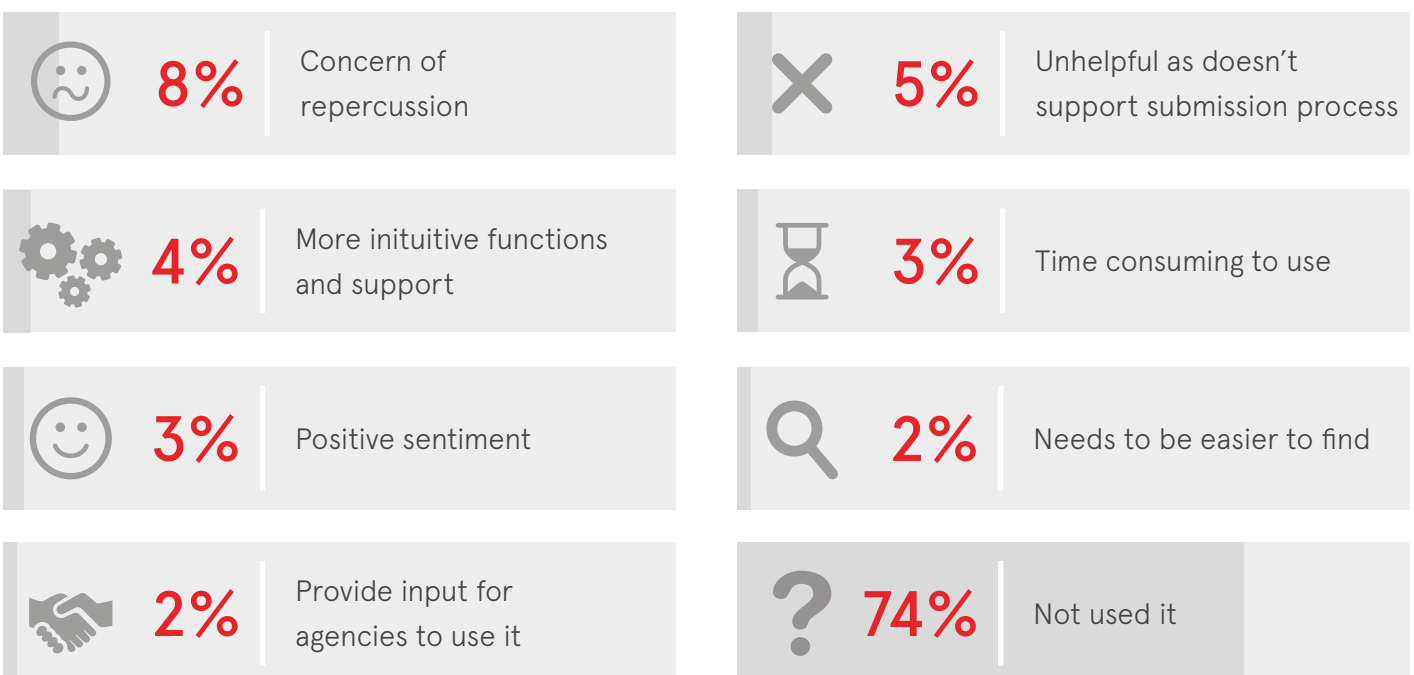
# PAAB tagging system

I am aware of the PAAB tagging system which enables clients to document procedural, behavioural, or expertise issues encountered during the review process for PAAB management assessment without informing the reviewer.

Avg.  
5.2



## Do you have feedback on the tagging system?



# Education & support

In what ways can PAAB improve to better meet the needs of the industry as a preclearance agency?



32%

Improve consistency in the review process \*



19%

Increase flexibility and collaboration



7%

Training sessions and online courses with case examples & code clarifications



7%

Improve the User Experience for online submissions



6%

Be more solution orientated to challenges



5%

Provide clearer communications



4%

Ease of use - code clarification and guidance docs



4%

Include patient voice in decision making



3%

Better use of RWE and new data sets



2%

The PAAB already serves the industry in the way that the industry wants

n=115

Some answers were omitted as they could not be categorised.

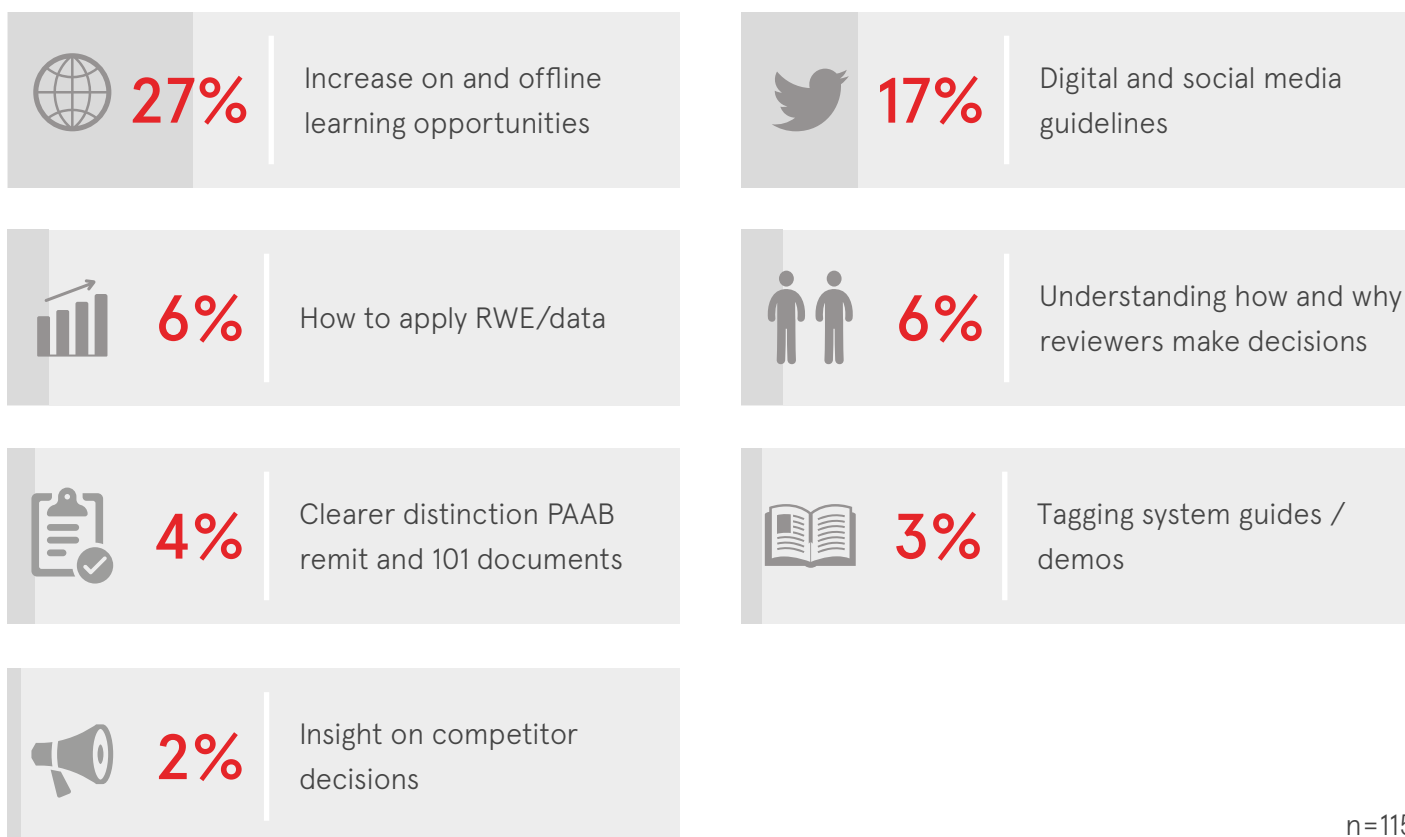
## Additional comments:

Respondents felt that PAAB lacks consistency “across brands/categories/reviewers” as summarised by one respondent. It was also noted how “some reviewers are much better at partnering, providing suggestions to get to a yes”.

# Education & support

Respondents requested that PAAB more broadly increases its on and offline education opportunities. This is the biggest need from respondents.

## What is your biggest learning need from the PAAB?

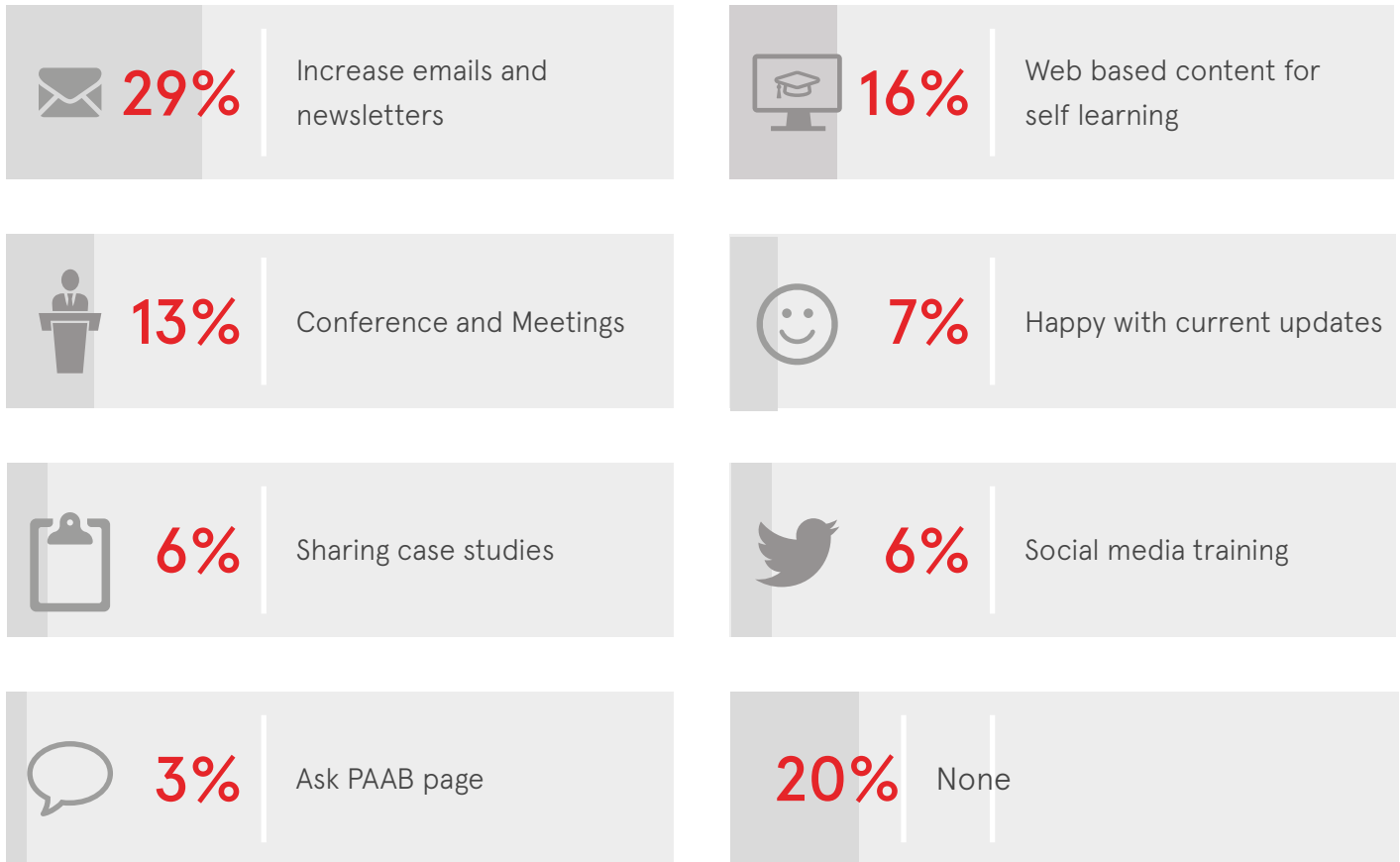


n=115

Some answers were omitted as they could not be categorised.

# Education & support

## How else could/should PAAB engage you with updates and content?

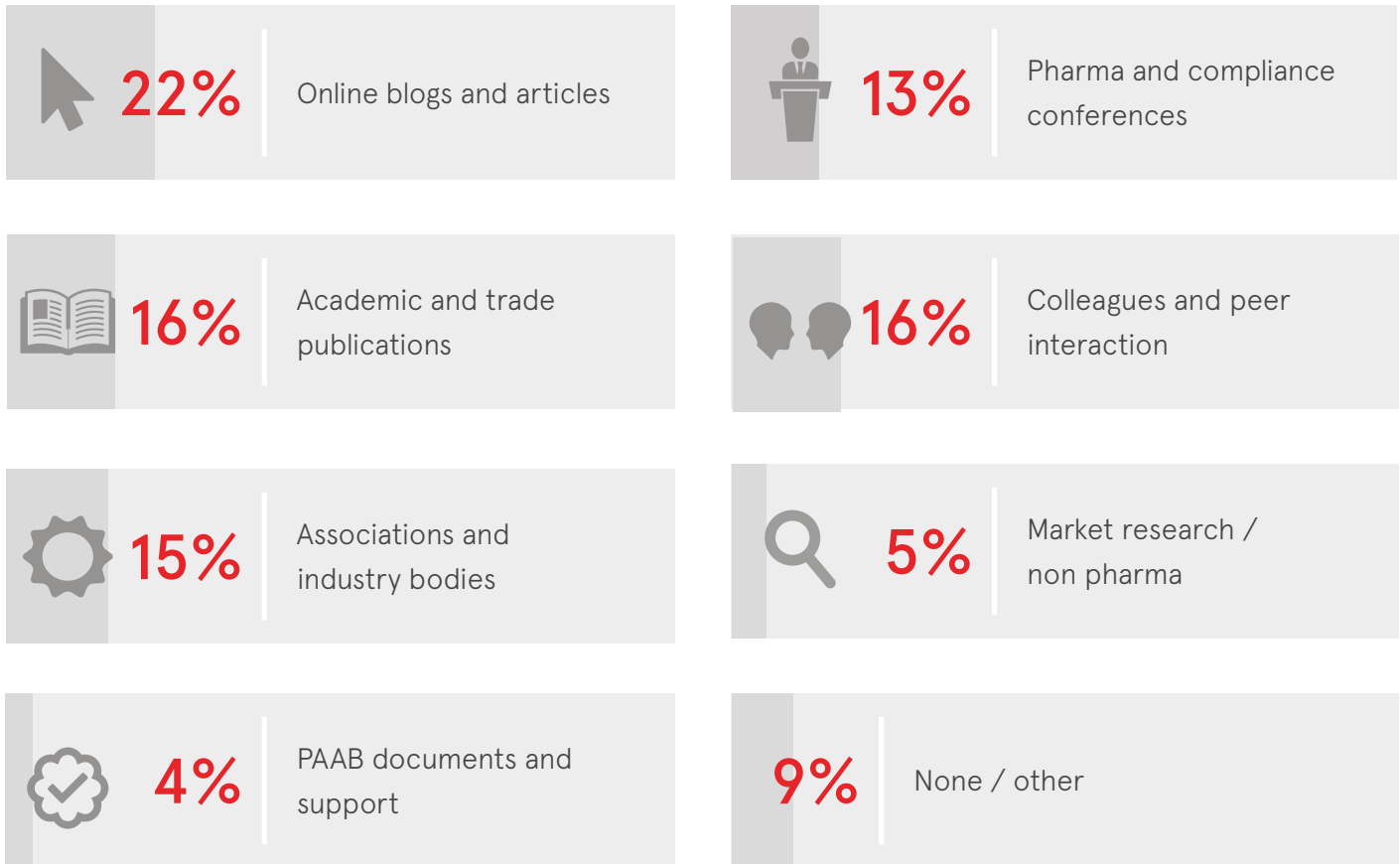


n=115

Some answers were omitted as they could not be categorised.

# Education & support

Where do you go to learn about new trends and innovations that can help you in your role?



n=115

Some answers were omitted as they could not be categorised.

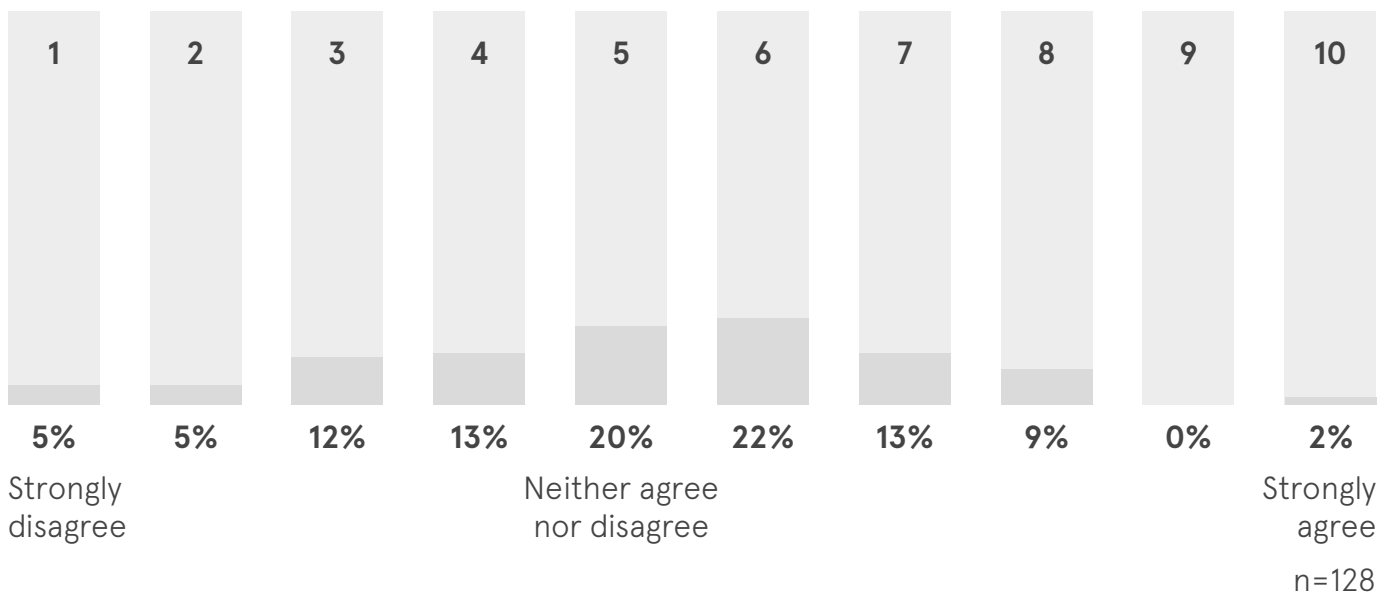


# Perceptions of trust

On a 10 point scale, survey respondents provided an average score of 5.7 when asked if they feel the pharmaceutical industry is trusted by doctors.

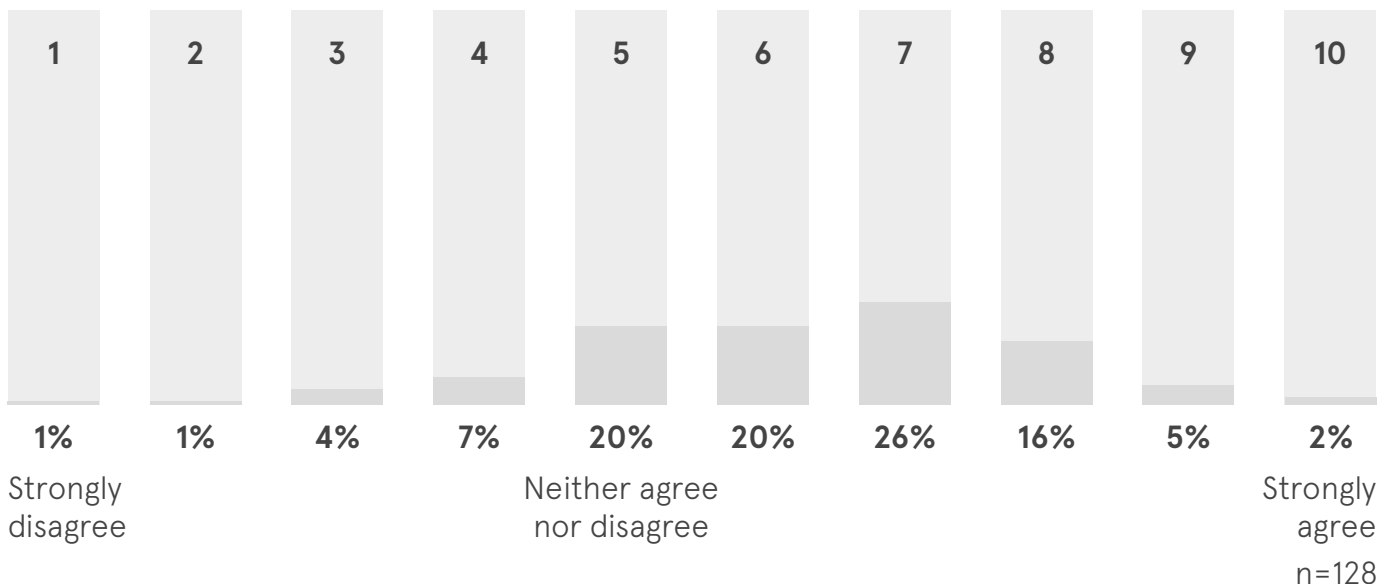
## The pharmaceutical industry is trusted by patients.

Avg.  
5.1



## The pharmaceutical industry is trusted by doctors.

Avg.  
6.3



# Key messages

## Sample of verbatim

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Not sure if PAAB is aware that you are valued, and **I'm glad you guys keep high standards in advertising.** I do think one improvement is to allow more leeway in certain content. This a general statement that could apply to HCP and patient pieces.

PAAB really needs to provide **online learning opportunities.** Giving some form of PAAB certificate for courses completed is an option.

There will be more and more digital engagement in the future. PAAB should look into **make submissions easier** as the process is made for traditional pieces.

Overall, PAAB reviewers are **REALLY great**....clarification calls are on average very productive, with most reviewers spending the time to **understand our perspective**, our challenges and goals, and are open to helping provide suggestions on **alternative ways** to approach challenges.

I would love to see PAAB help **bridge the trust gap** between the general public and industry. It would be great if eventually their mandate, along with Health Canada, could help **dispel pseudoscience** and **disseminate information people trust.**

I think a guidance document on **creative concepts** would be helpful.

**Thank You**

**Gracias** Merci

**Arigato** **Suksama**

**Grazie** **Shukria**

# Appendix

## Questions

1. We shall begin with a bit of fun. Please give yourself a nickname, if you can't think of one, your first name will do.
2. I work in:
  - A. An agency
  - B. A manufacturer
  - C. Other
3. My current position is in:
  - A. Marketing
  - B. Sales
  - C. Consultancy
  - D. Medical
  - E. Regulatory
  - F. Public Relations / Communications
  - G. Other
4. What trends do you see being of high importance for pharma companies this year?
5. Where will you or your team allocate the majority of the budget in 2019?
6. Canadian pharmaceutical companies do a good job in promoting their products and services.  
(1: Strongly disagree - 10: Strongly agree)
7. I consider myself to be knowledgeable on the application of the PAAB Code.  
(1: Strongly disagree - 10: Strongly agree)
8. PAAB maintains the construct of a self-regulatory environment without perception of industry bias.  
(1: Strongly disagree - 10: Strongly agree)
9. PAAB is a model organization for independent review agencies operating in a regulatory environment.  
(1: Strongly disagree - 10: Strongly agree)
10. I value the PAAB as a source of knowledge and support for trustworthy health product communication.  
(1: Strongly disagree - 10: Strongly agree)
11. PAAB reviewers make themselves available for questions and discussions regarding PAAB submissions, providing valuable information.  
(1: Strongly disagree - 10: Strongly agree)
12. PAAB reviewers assist with finding solutions to challenges with submissions.  
(1: Strongly disagree - 10: Strongly agree)
13. The PAAB Code is generally interpreted similarly between reviewers, and from one material submission to the next.  
(1: Strongly disagree - 10: Strongly agree)

# Appendix

## Questions continued

14. Commentary received by PAAB reviewers in response to the first submission is complete and thorough  
(1: Strongly disagree - 10: Strongly agree)
15. I am aware of the PAAB tagging system which enables clients to document procedural, behavioural, or expertise issues encountered during the review process for PAAB management assessment without informing the reviewer.  
(1: Strongly disagree - 10: Strongly agree)
16. Do you have feedback on the tagging system?  
Comments can range from ways to improve, to areas that work well.
17. In what ways can PAAB improve to better meet the needs of the industry as a preclearance agency?  
This is your chance share all views and ideas, please be honest.
18. What is your biggest learning need from the PAAB?
19. How else could/should PAAB engage you with updates and content?
20. Where do you go to learn about new trends and innovations that can help you in your role?
21. The pharmaceutical industry is trusted by patients.  
Please choose a number on the scale below showing whether you agree or disagree with the above statement.  
(1: Strongly disagree - 10: Strongly agree)
22. The pharmaceutical industry is trusted by doctors.  
Please choose a number on the scale below showing whether you agree or disagree with the above statement.  
(1: Strongly disagree - 10: Strongly agree)
23. Would you like to expand on any of your answers and/or provide feedback on a topic not covered?  
Please share your thoughts from the previous questions.