

M BOOTH ✕ HEALTH

PHARMA BRANDEMIC

2022

HOW THE COVID VACCINE CHANGED
HEALTHCARE COMMUNICATIONS FOREVER





3

INTRODUCTION

5

THE PHARMA BRANDEMIC

11

EMERGING AUDIENCES AND BEHAVIORS

16

**PATIENT EMPOWERMENT
IN AN ERA OF MISINFORMATION**

20

A NEW HEALTHCARE DYNAMIC

INTRODUCTION

The COVID-19 pandemic has created new expectations for healthcare providers and pharmaceutical companies. That's because consumers are more informed and engaged in their healthcare decisions than ever before as a result of pandemic news and information being so ubiquitous and accessible, largely underscoring the vital role played by frontline healthcare providers and the vaccine and treatment brands that saved millions of lives. Newfound consumer confidence in making healthcare and pharmaceutical choices has produced a marked shift in the power dynamic between patients, providers, and Pharma over the last two years.

Before Pfizer, Moderna and Johnson & Johnson became household names as their Covid-19 vaccines entered our lives, most Americans could scarcely cite a pharmaceutical company or brand, no less tell you what company made or marketed the medicines they take or have been prescribed.

Savvy marketers and trillions of dollars have been spent working to etch the brand names and reputations of pharmaceutical companies and their innovative therapies into the minds of consumers, with mixed results. Unaided brand awareness of most drugs has remained consistently low, and consumers have historically placed their faith in health care professionals to prescribe, monitor and know the differences between therapeutic options, trusting them to decide which is most efficacious, safe, and with the fewest side effects.

To boot, Big Pharma is seldom among the nation's "most admired brands" or "most influential brands" on rankings lists that poll consumers.

COVID-19, and its steady drumbeat of news coverage, conversation, and concern, produced significant changes in consumer awareness, understanding, and behavior toward pharma brands and companies. As the race to make vaccines available intensified, Americans paid close attention to how the vaccines were developed, whose science was strongest, which brand was 'superior,' and which was "the one" or ones to get.

In the span of a year, a super-challenger patient emerged, with curious citizen scientists and opinionated pharma brand hunters growing ever more emboldened and willing to challenge recommendations from health care professionals, even when their knowledge was tainted by the spread of health misinformation.

This sea change began in 2021, persisted, then intensified in 2022. The ramifications for pharma, physicians, and patients is far reaching.

This report, based on two waves of research fielded in March, 2021, and February, 2022, provide evidence of the new healthcare dynamic, with pointers for how to adapt communications accordingly.



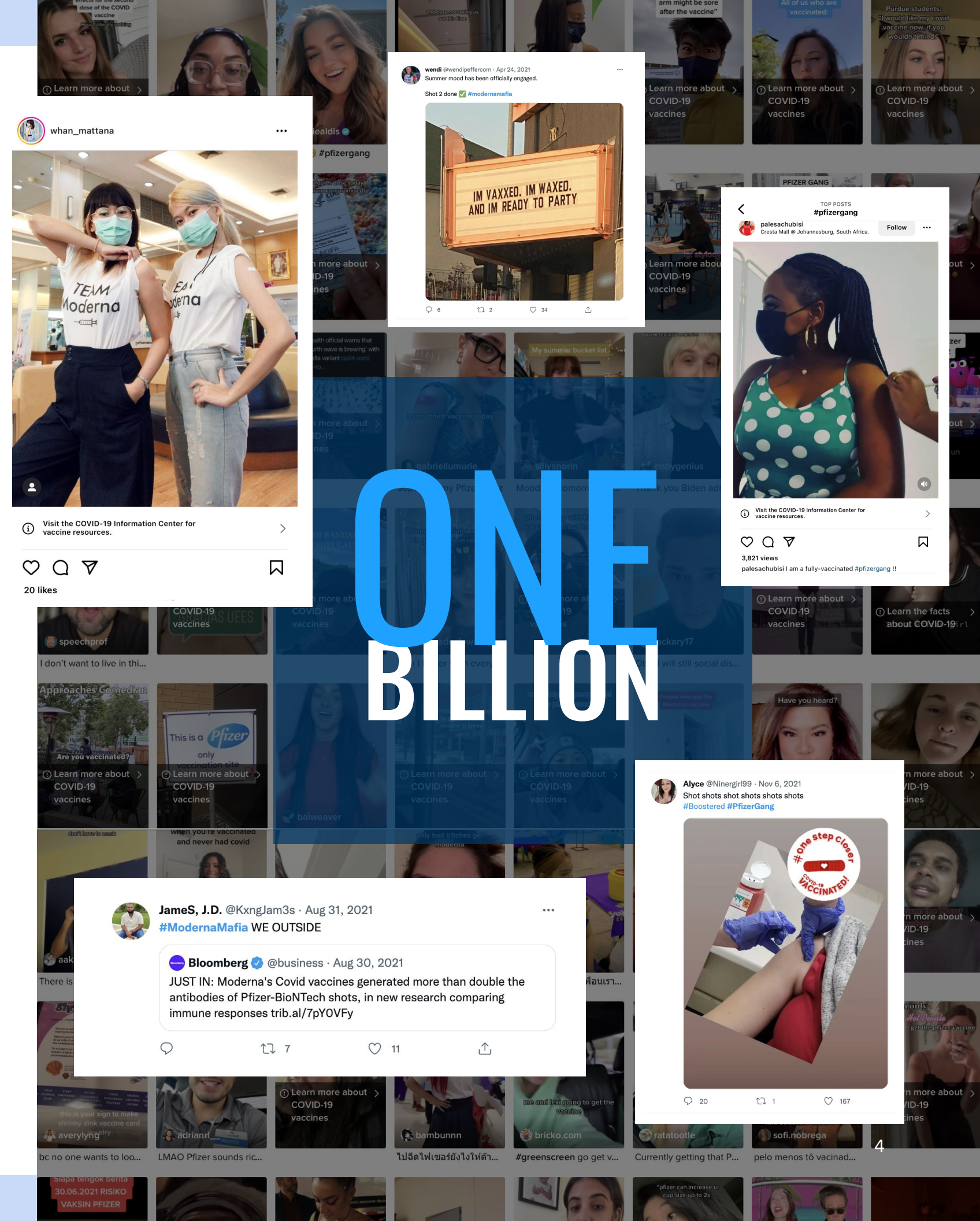
AN EXPLOSION IN PHARMA BRAND CONVERSATION

One Billion. That's how many engagements there were with COVID--19 vaccine brands on social media* in the 6 months following the availability of Pfizer, Moderna, J&J, and AstraZeneca vaccines in 2021. From SNL mentions to hashtags like #PfizerGang and #TeamModerna, never before had pharma brands been thrust into the limelight and cultural dialogue like this.

More significant are the ways that pharma brands, new to the cultural zeitgeist, shifted how consumers and healthcare providers now expect pharmaceutical companies to communicate and market themselves.

Read on to learn why pharma marketing and communications have changed so dramatically, and how pharma brand stewards can navigate an entirely new relationship between patients, providers, and pharma itself.

*Source: Talkwalker analysis based on mentions of COVID vaccine pharma brands across Instagram, YouTube, TikTok, Twitter



THE PHARMA BRANDEMIC



IN APRIL 2021

THE PHARMA BRANDEMIC IS BORN

As conversation around COVID-19 vaccine brands grew, something bigger was brewing – Americans were becoming more educated about vaccine brand names and the reputations of the companies behind the innovations. This interest and awareness in pharmaceutical company research and communications produced a phenomenon dubbed and referred to by media as **THE PHARMA BRANDEMIC**.

61%

of Americans said they were more aware of pharma companies and brands overall

51%

more aware of the differences between pharma companies and brands overall

MORE THAN
1 IN 5

(21%) said the company that made their treatment was now an important factor when selecting a treatment

Source: M Booth Health Pharma Brandemic Study 2021

pharma brandemic™
[far-ma bran-dem-ic] noun

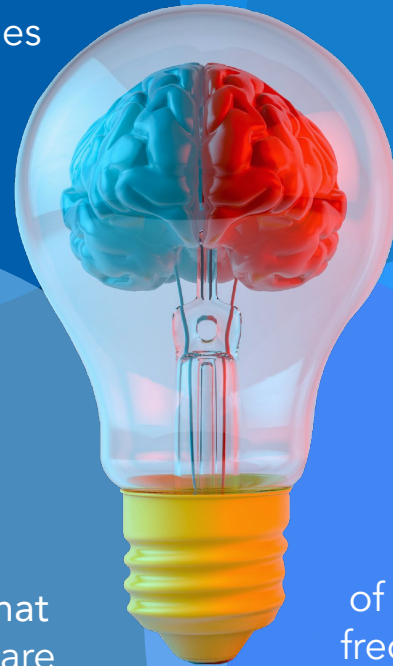
AN EPIDEMIC OF HEIGHTENED AWARENESS AND INTEREST IN PHARMACEUTICAL COMPANY BRANDS,
A DIRECT CONSEQUENCE OF COVID-19 VACCINE BRAND NEWS AND CONVERSATION.

+19%

80%
of Americans are more aware of pharma companies and brands

+22%

73%
are more aware of the differences between pharma companies and brands



51%

say the company that makes a drug they are prescribed is very important to them

+30%

41%
of HCPs say they have frequently experienced patients asking which pharma brand is "better" for certain treatment / medicine / vaccines in the last 12 months

A PHENOMENON WITH STAYING POWER

Skeptics might assume this surge in pharma brand awareness is fleeting – a hyper-sensitivity and preoccupation with which pharma manufacturers offer the safest, most efficacious COVID-19 vaccines and treatments. The statistics say otherwise. Overall pharma brand awareness and preference skyrocketed between 2021 and 2022.

Perceptions are reality – and the new reality is that consumers know more about Pharma brands than ever before, and as a result, see and engage with them in a whole new way.

WHY IT MATTERS

Increased pharma brand awareness in response to COVID-19 is not going to fade away. The life-altering impact of COVID-19 and the vaccine race that continues today recast the role that all pharmaceutical companies play in people's lives. Greater consumer appreciation and interest in pharma offers a window of opportunity for a range of pharma brands to further bolster brand affinity, trust and understanding right now.

THE BIG CHANGE: PHARMA BRANDS AS LIFESTYLE BRANDS

The majority of Americans today, as a result of the Pharma Brandemic, say they now see pharma brands more like lifestyle brands.

Which is to say, the name recognition, normalization, and omnipresence of conversations around pharma brands (e.g. “Did you get the Pfizer or Moderna booster?” “I heard mixing and matching the Johnson & Johnson vaccine with the Moderna booster is the way to go”) produced new expectations of how a Pharma brand should behave.

58%

of Americans stated that how a pharmaceutical company communicates with them is just as important as how effective its treatments are

77%

of HCPs think increased attention paid to pharma brands as a result of the vaccine race means pharma companies need to change how they connect with patients and market their medicines

Source: M Booth Health Pharma Brandemic Study 2022, M Booth Health HCP Survey 2022



53%

of Americans now see pharma brands more like lifestyle brands

(e.g. Nike, Amazon, etc.)

+19% YOY

WHY IT MATTERS

Consumers will increasingly expect Pharma brands to present themselves more like lifestyle brands. That means Pharma brands should personalize benefits and messages more; allow consumers to see their lifestyle and circumstances in words and imagery; speak honestly and transparently; be approachable and easy-to-understand; break through with simplicity and creativity; and above all, emerge as culturally-relevant forces in people’s lives.

A SHIFT IN PERCEPTION = A SHIFT IN EXPECTATIONS

Remarkably, nearly half (47%) of Americans say that how a pharmaceutical company shows up in the media and online is as important as how effective its treatments are. If pharmaceutical companies and brands continue communicating using an old marketing playbook, they risk becoming an anachronism or an also ran.

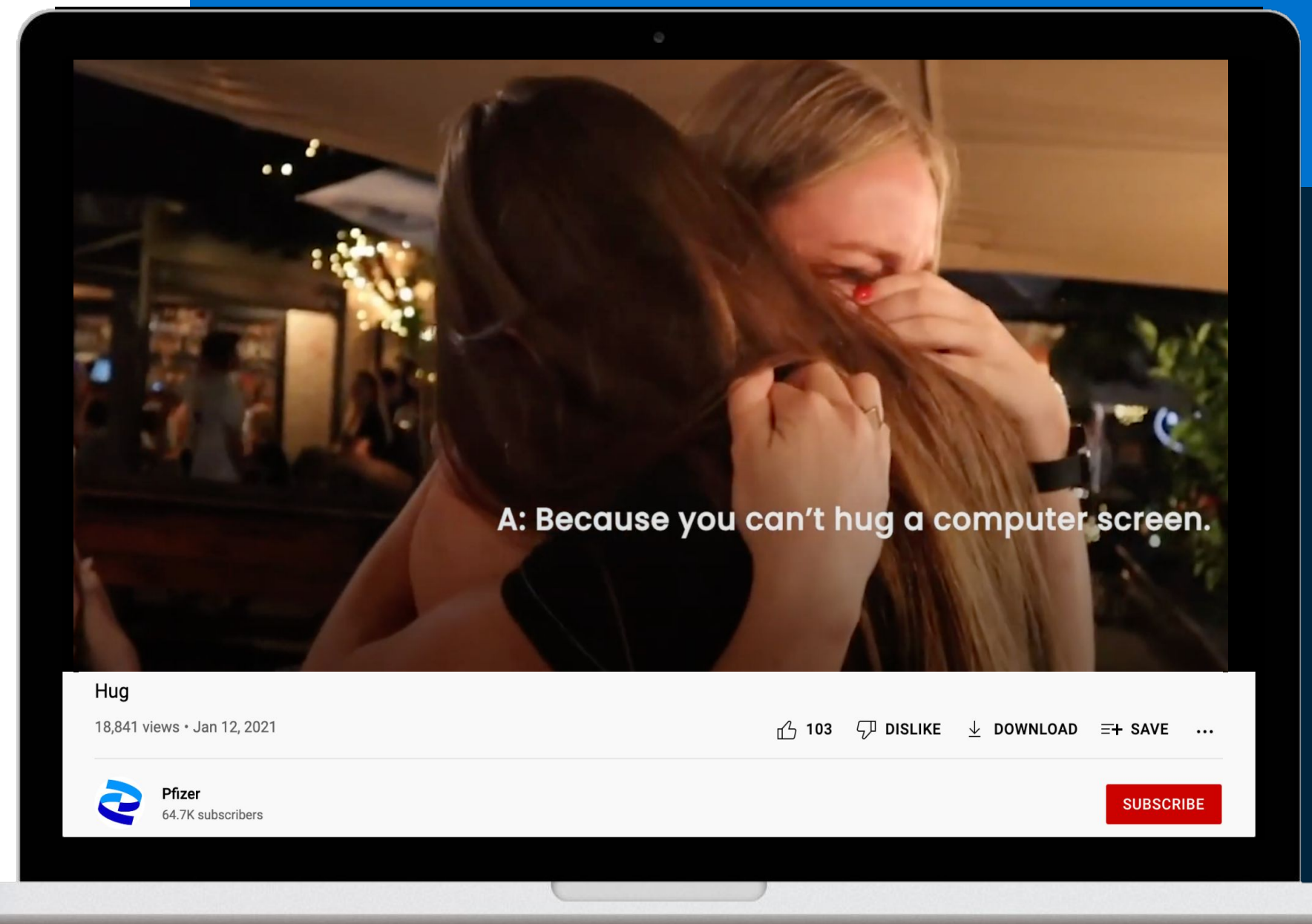
One company that demonstrated the power of pivoting quickly and communicating simply is Pfizer. With its #ScienceWillWin campaign, Pfizer capitalized on its COVID vaccine limelight with [messaging](#) and [content](#) that communicated its mission in a way that was simple and understandable and aligned with the raw defiance, set of beliefs, and identity of millions of Americans. #ScienceWillWin is for Pfizer what “Just Do It” is for Nike - a pithy, emotional, and memorable marketing approach that helped catapult Pfizer into 7th place in the respected 2021 Axios Harris 100 brand rankings – 55 places *higher* than Nike. And though Pfizer’s position on the list dipped in 2022, it remains higher than any other pharma brand, 12 places higher than Nike, and strongly positioned to build on its relationship with consumers as a trusted, science-anchored brand.

42%

of Americans say they would be more likely to interact with a pharma brand online if its content was more like brands they use / use every day (e.g. *Coca-Cola, Nike, Apple*).

38%

Americans say that how trendy, creative and innovative a pharma company is, is important to them when choosing treatments / medicines.



TOP WAYS CONSUMERS WANT PHARMA BRANDS TO OPERATE MORE LIKE LIFESTYLE BRANDS

- 1 Show that you're listening and acting on customer feedback (48%)
- 2 Use simple, easy-to-understand language (42%)
- 3 Showcase and stick to a strong company mission & values (37%)
- 4 Use real people / stories in your marketing that I can relate to (34%)
- 5 Make products and experiences that are personalized to me (29%)

Source: M Booth Health Pharma Brandemic Study 2022



WHY IT MATTERS

The role that pharma played in helping Americans get through COVID-19 strengthened consumer confidence and trust, but also expectations for creativity and transparency. Pharmaceutical brands and marketers have permission and a sense of urgency to communicate like lifestyle brands - and those that do it well will earn a favored place in the minds of consumers who now see pharma as intrinsic to their lives.

EMERGING AUDIENCES AND BEHAVIORS



THE RISE OF THE 'SUPER CHALLENGER' PATIENT

The sharp increase in awareness and engagement with pharma brands has brought with it a profound increase in patient confidence – with 65% of Americans saying they're more confident in their knowledge of healthcare and treatments than [ever before](#).

In fact, the top three feelings Americans say they have going into a doctor's office today are 1. Confidence (52%), 2. Preparedness (41%) and 3. Knowledgeable (38%)

This amplified sense of assuredness has produced a new patient segment – **THE SUPER CHALLENGER**. This consumer typology is characterized by acting as citizen scientists who do their own research, pharma brand hunters who decide which pharmaceutical company they like, and physician rejectors who believe their knowhow trumps the experts.

As corroboration, HCPs say this segment is the fastest-growing patient type they see - with 88% of HCPs reporting that this behavioral type has grown more than any other in the last 12 months. Alarming, 42% of physicians say that they have "frequently experienced" patients challenging their recommendations in the last year.

Source: M Booth Health Pharma Brandemic Study 2022, M Booth Health HCP Survey 2022

THE SUPER CHALLENGER

CHALLENGING THEIR DOCTOR

48%

of Americans are more confident challenging their doctor post-pandemic

LEARNING THE SCIENCE

63%

of Americans say they are more likely to learn about the science behind a treatment or medication before they accept it

REQUESTING SPECIFIC PHARMA BRANDS

MORE THAN
1 IN 3

(35%) Americans have asked their doctor for a specific treatment / medication / vaccine because of the company / brand that makes it in the last 12 months

REJECTING THEIR DOCTOR

NEARLY
1 IN 3

(32%) have turned down a treatment recommended by their doctor. With the same number seeking a second opinion

CONDUCTING THEIR OWN RESEARCH

65%

of Americans have done their own research on a medication they've been advised to take by their HCP.

ENGAGING WITH HEALTH INFLUENCERS

MORE THAN
1 IN 3

(34%) have followed health experts on social media in the last 12 months

42%

have looked for what others have said on social media about a drug or treatment before they request or accept it

WHY IT MATTERS

Today's patient population is the most actively engaged and participatory we've ever seen. For pharma brands and marketers, it presents a more confident and captive audience that's more receptive to healthcare communications, but also an audience that must navigate overwhelming amounts of information from both credible and unverified sources. Pharma brands can become the information broker between patients, doctors and trusted sources of healthcare information to manage the tension between receptivity and confusion.



BLACK AND LATINX AMERICANS MORE CONFIDENT, VOCAL, ENGAGED AND PHARMA-BRAND SAVVY THAN EVER

The feeling of agency among ‘Super Challenger’ patients is highest among minority populations - the very segments that have historically been disempowered and marginalized by the American healthcare system. The 2022 Pharma Brandemic survey revealed that African Americans and Latinx Americans feel more confident than any time before about expressing their healthcare preferences with providers, and engage with pharma online proportionally more than any other patient population. This, of course, is an encouraging and overdue trend that presents another important opportunity for pharma.

MORE CONFIDENT

54%
AFAM | 56%
LATINx

today say they are more confident challenging their doctor if they feel they disagree with their recommendations.

vs 48% of gen pop

MORE VOCAL

47%
AFAM | 52%
LATINx

say they requested a specific treatment/medicine different to the one selected by their doctor in the last 12 months

vs 37% of gen pop

MORE BRAND SAVVY

62%
AFAM | 63%
LATINx

say they always or often check the label of prescription or drugstore medicine to see which company makes it before deciding to select it

vs 51% of gen pop

MORE ENGAGED WITH PHARMA ONLINE

39%
AFAM | 42%
LATINx

say they have followed or interacted with pharma brands on social media in the last 12 months

vs 29% of gen pop

PHARMA BRANDEMIC INFLUENCED

61%
AFAM | 59%
LATINx

say that they see pharma brands more like lifestyle brands today

vs 53% of gen pop



TOP 3 THINGS AFRICAN AMERICAN AND LATINX PATIENTS

WANT TO SEE PHARMA DO MORE OF IN THEIR COMMUNICATIONS

- 1** | **Help me distinguish** between false and accurate healthcare info
- 2** | **Be more realistic / honest** about realities of treatment/disease
- 3** | **Show me what goes on behind the scenes** at pharma companies (*R&D, setting prices*)

Source: M Booth Health Pharma Brandemic Study 2022



WHY IT MATTERS

The increased confidence, vocality, and engagement among African American and Latinx patients in the doctor's office and with pharma brands presents a unique moment for pharma to truly connect with these audiences authentically. To do so, pharma brands and marketers will need to play a role in identifying and correcting misinformation, while providing a clearer picture of how medicines are developed, and even priced.

GEN Z ARE THE BIGGEST HEALTH INFORMATION HUNTERS AND DOCTOR DEFIERS

Gen Z, the youngest, most ethnically diverse and largest generation in American history, constitutes 27% of the US population, and in matters of health, represent the future of how pharma must rethink marketing and communications. Gen Z patients are ‘citizen scientists’ and ‘health information hunters’ that actively consume health-related content and information to better understand their health and treatment options. The wealth of information they have at their fingertips gives them confidence to make their preferences known to healthcare providers, and they will likely favor healthcare and pharma brands that empower them further.

Source: eMarketer Insider Intelligence, M Booth Health Pharma Brandemic Study 2022

HEALTHCARE INFORMATION HUNTERS

56%

of Gen Z say they read a medical journal in the last 12 months to learn about a treatment or vaccine

vs 41% of gen pop

59%

say they read clinical trial data about a vaccine or treatment

vs 51% of gen pop

BRAND SAVVY

56%

of Gen Z have asked their doctor to explain the difference between pharma companies making a treatment in the last 12 months

vs 44% of gen pop

VOCAL

49%

have shared their own opinion on healthcare news and updates on social media in the last 12 months

vs 34% of gen pop

DEFIANT

53%

have disagreed with something a doctor has advised them on in the last 12 months

vs 37% of gen pop

58%

say they are more likely to tell their doctor about a preference they have for a certain pharma brand

vs 54% of gen pop



SEEKING AGENCY AND EMPOWERMENT FROM PHARMA

61%

of Gen Z say that how much a pharma company empowers and enables them to speak up in the doctor's office is important to them when selecting a treatment.

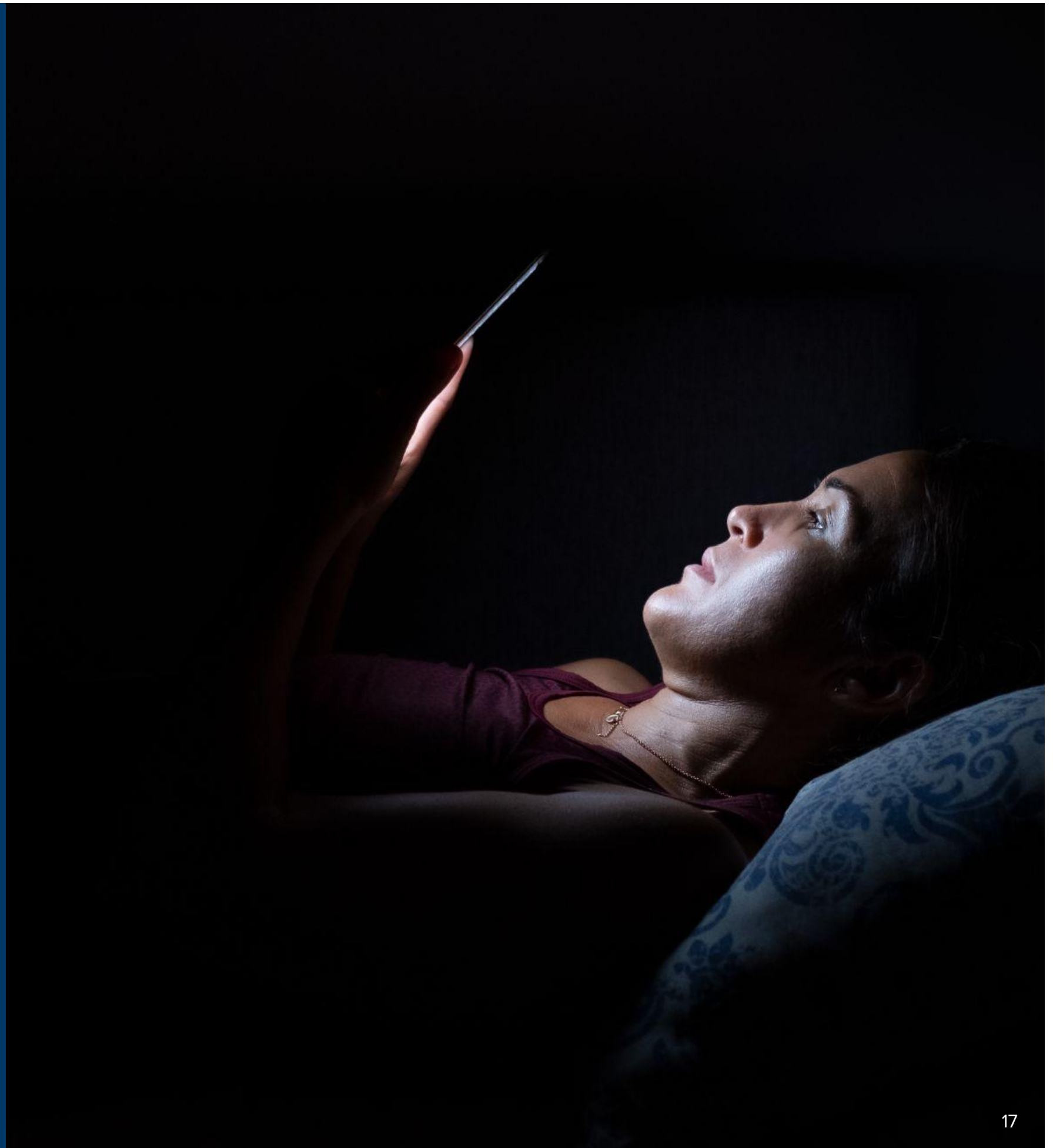
Source: M Booth Health Pharma Brandemic Study 2022



WHY IT MATTERS

Gen Z represent the patient of tomorrow - digital-first, health information rich and not afraid to speak their mind about their health and treatment preferences in the doctor's office or online. Pharma brands can gain the allegiance of Gen Z by harnessing their knowledge and quest for health information through tools that encourage productive two-way dialogue with experts, doctors and treatment providers. Additionally, intercepting Gen Z patients who are actively talking about their health preferences, challenges and searches for information will be critical in maintaining a positive relationship with this audience over the long term.

**PATIENT
EMPOWERMENT
IN AN ERA OF
MISINFORMATION**



ONLY 20%

OF HCPs

say patient empowerment is completely positive



1 IN 3



1 IN 10



say a mix of positive and negative

say it's a negative

PATIENTS SAY COLLABORATIVE HCPs

ARE #1 MOST PREFERRED

HCPs SAY COLLABORATIVE PATIENTS

ARE #1 PATIENT TYPE

they're able to treat most successfully

PATIENT EMPOWERMENT PERCEIVED AS MIXED BAG

Big shifts in patient behavior and confidence have influenced the doctor/patient relationship, with ramifications for health outcomes and for pharma.

Empowered patients would seem to be good news since the industry has worked assiduously to engage consumers more in their health and health choices. Yet, only 1 in 5 doctors say they see patient empowerment as a completely positive trend. A third of doctors see more empowered patients as a mix of good and bad, and 10% say it's a negative trend.

Where patients and physicians share the same view is around collaboration. Patients say a collaborative doctor is their #1 preferred style of doctor, while doctors say a collaborative patient is the easiest to treat successfully.

SO WHY IS PATIENT EMPOWERMENT, THE KEY TO SUCH COLLABORATION, VIEWED SKEPTICALLY BY DOCTORS?

The Pharma Brandemic survey found one particularly strong force driving a wedge between doctors and their patients...

MISINFORMATION IS EVERYWHERE

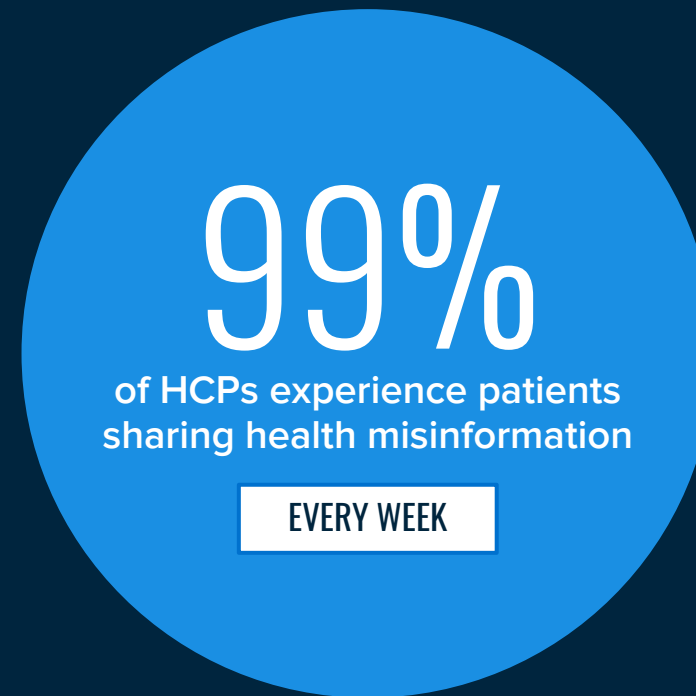
ALL THE TIME

THE RISE AND RISE OF MISINFORMATION

The World Health Organization declared a misinfodemic in 2020, noting that a rise in false and inaccurate health information was jeopardizing efforts to manage and slow the COVID-19 pandemic, ultimately costing lives. In the words of a new report from the U.S. Surgeon General, health misinformation is a serious threat to public health, causes confusion, sows mistrust, harms people's health, and undermines public health communications.

Virtually every HCP we spoke to said they encounter patients sharing misinformation on a weekly basis, with 43% of majority physician respondents saying it's a daily phenomenon.

Consumers echoed the findings - 88% believe they have encountered health misinformation, and more than 1 in 3 (35%) say they come across it almost daily. African Americans (40%) and members of Gen Z (39%) reported the perils of healthcare misinformation most frequently.



NAVIGATING A SEA OF UNCHECKED HEALTH INFORMATION SOURCES

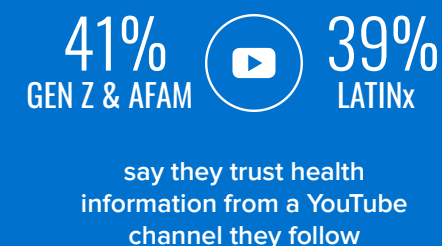
FRIENDS & FAMILY



ONLINE INFLUENCERS



YOUTUBE CHANNELS



FAVORITE BRANDS



PODCASTS



THE CONSEQUENCES OF MISINFORMATION

The mix of misinformation and patient confidence is a dangerous combination. It has the ability to negate what's positive about patient empowerment, driving a wedge between what had once been a respectful and trusting relationship between patients and providers. Nearly half (48%) of providers have less confidence today that patients will comply with their recommendations, and worry that patients are taking counsel from information from unqualified experts, or data that's been cherry-picked and misstated.

Source: M Booth Health Pharma Brandemic Study 2022, M Booth Health HCP Survey 2022

FACT FAKE

WHY IT MATTERS

Most HCPs (90%) and Americans (73%) say they are worried about health misinformation. Nearly a third (31%) of HCPs say they think pharma companies are responsible for correcting misinformation. Individuals need to be taught how to verify the credibility of sources; media need to check sources and avoid unfounded, provocative headlines, researchers need to study the harm misinformation causes, government needs to deploy trusted messengers to reach diverse populations, and pharmaceutical companies must play a role in educating audiences to discern what information is rooted in science, versus what's pure hearsay.

AND SO WHERE DOES THIS LEAVE US?

AT A CRITICAL CROSSROADS



A NEW HEALTHCARE DYNAMIC

Empowered patients. Disempowered physicians.

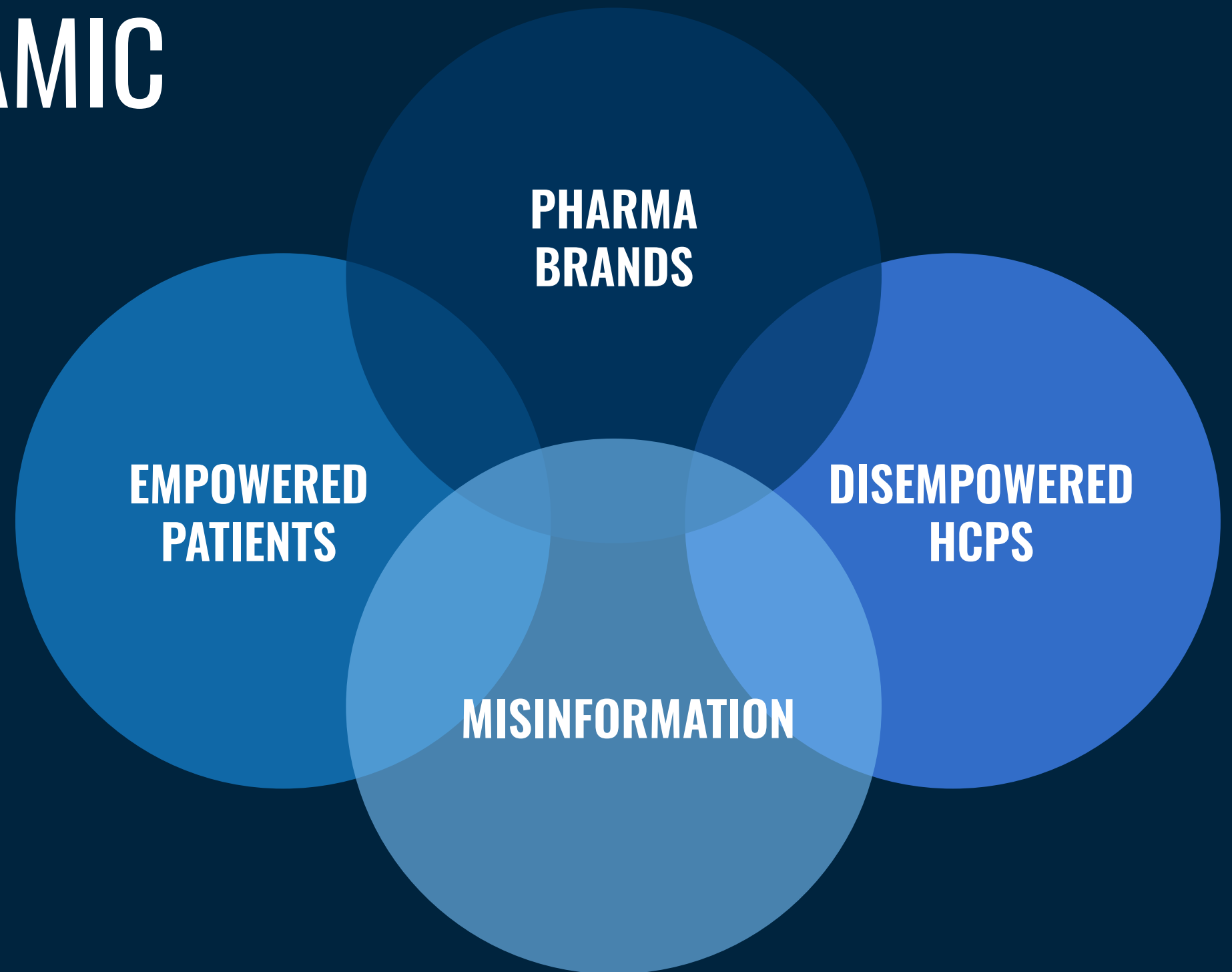
An increasingly skewed relationship fueled by the dueling forces of a Pharma Brandemic and misinfodemic conspire to seriously threaten public health.

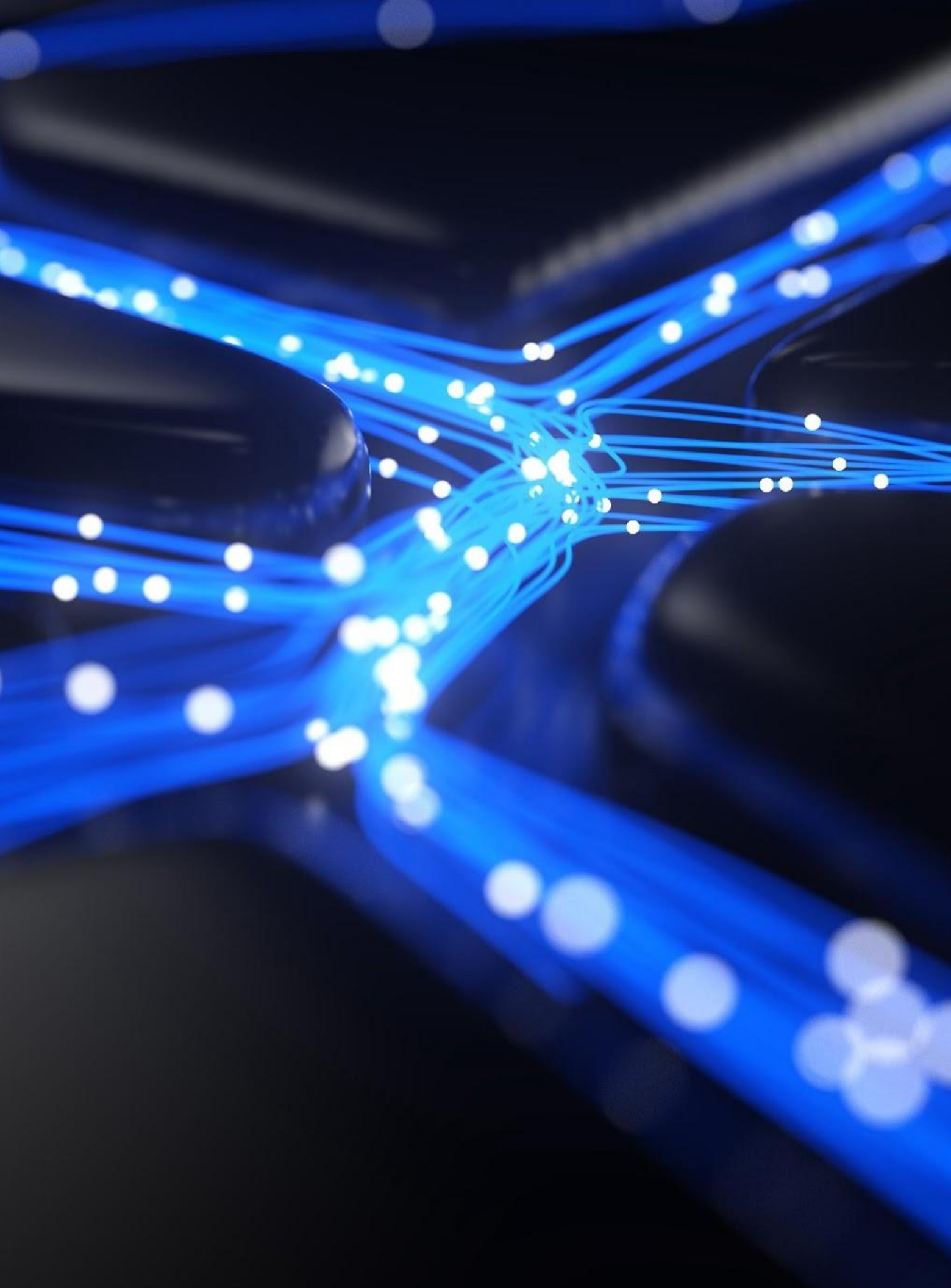
Feeling more disempowered, physicians report growing disenchanted, adding tension and stress to their already demanding professional lives. Patients, meanwhile, continue to spout misinformation and make demands that are often unsubstantiated by science. This conflict is not likely to abate without interventions to rebalance the patient-physician dynamic.

Many players have a role and responsibility to reshape the patient-professional relationship. Media companies must prevent, spot, and correct misinformation. Doctors and patients will need to work harder at collaboration through a recommitment to mutual respect and better listening on both sides. Credible sources must replace unqualified experts. Conspiracy theories must be flagged.

But above all else, pharmaceutical companies and brands have unprecedented permission to help fix the patient/provider power dynamic and restore trust in health data and experts.

HERE'S HOW...





BECOME INFORMATION BROKERS AND DISPEL MISINFORMATION

PROVIDE HCPs WITH TOOLS TO ENGAGE WITH PATIENTS DIRECTLY ON HEALTH MISINFORMATION

Now and in the future, pharmaceutical companies, in partnership with HCPs, have a powerful and important role in addressing health misinformation head on. It requires creating tools that allow providers to meet patients where they are – taking into account differences in health literacy, knowledge, beliefs, and values. Pharma also has a responsibility to correct misinformation as it arises, in a tone that’s empathetic and oriented to different patient groups. Content produced by pharmaceutical companies for use by HCPs in their interactions with patients must be easy-to-understand, culturally-sensitive, evidence-based, yet direct and emphatic separating myths and rumors from reality.



MARKET AND COMMUNICATE LIKE LIFESTYLE BRANDS

The pandemic's proliferation of health information heightened expectations for health news and guidance, delivered clearly, succinctly, and yes – creatively. The Pharma Brandemic survey revealed that the majority of Americans now see and want pharmaceutical brands to show up more like popular consumer brands.

Why do people like and pay attention to consumer brands like Nike (“Just Do It”) and Apple (“Think Different”)? For starters, successful lifestyle brands use language that rallies and empowers consumers, and lets them see themselves and the benefits of the brand in their lives. They use language and imagery that’s catchy, distinctive, and memorable. And they tap into human truths – promoting the value they offer that meets specific and well-understood human needs. Nike addresses the human desire to achieve one’s potential. Apple offers “high tech” benefits without using high tech language – spelling out how it improves lives (e.g. the iPhone lets you put the power of an Apple computer in your phone and the iMac makes your computing experience exciting and pleasurable.)

How might Pharma marketers emulate these best practices...?

RAMP UP THE CREATIVITY

Pharma marketers surely understand that consumer empowerment, personalization, and expectations for engagement require creativity and boldness, despite regulations, side-effect reporting guidelines, risk disclosures and the sensitive handling of sensitive topics.

WHAT'S WORKING?

EARNING

attention, approval and trust by inviting open conversation around health issues and treatments, especially the stigma surrounding them.

PRODUCING

engaging and entertaining content that speaks to a patient population's experience and preferred messages, messengers and media.

FINDING

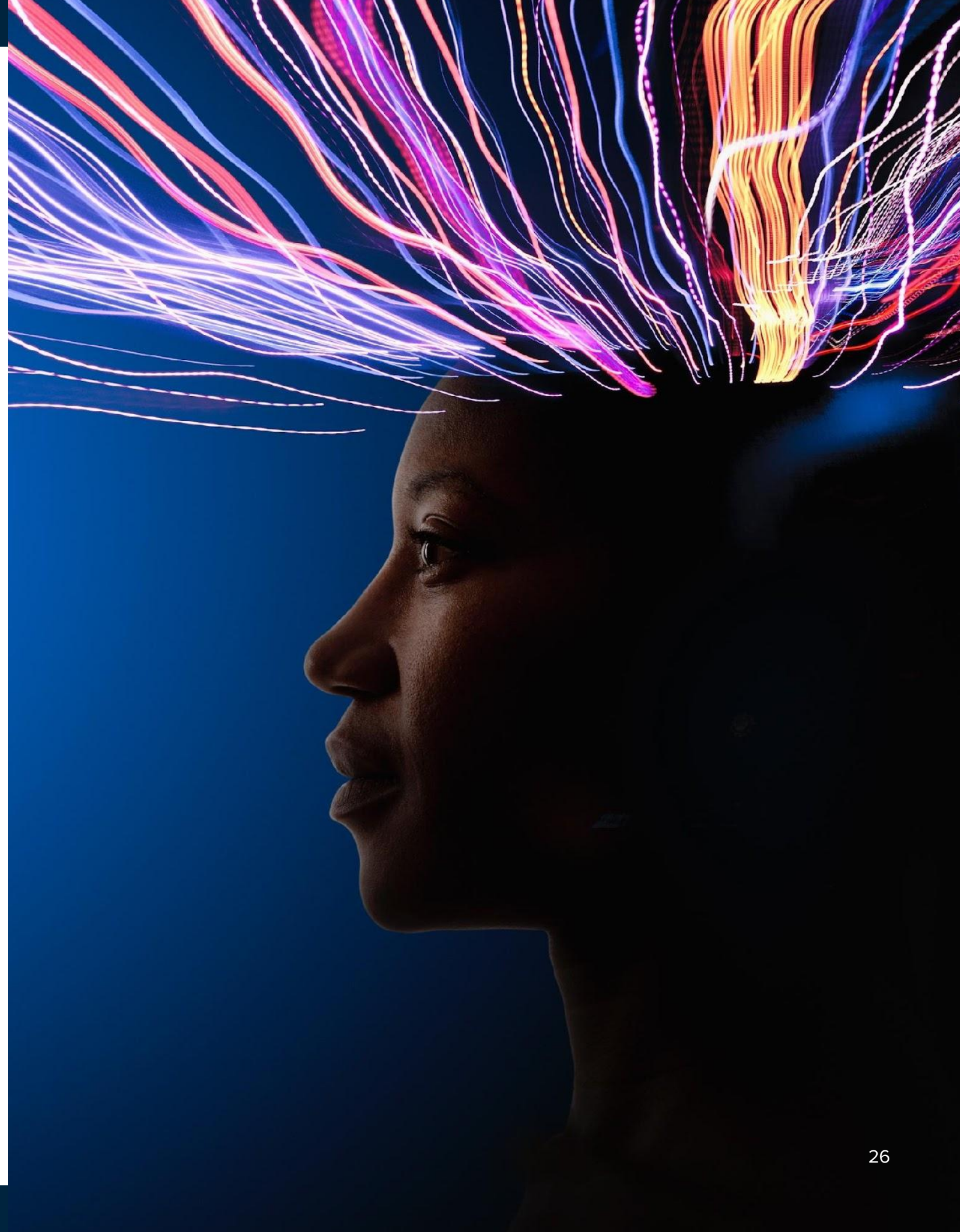
the "human truth" and conveying product or service benefits.

FAVORING

visuals over text, investing in brilliant design, and keeping it simple.

EXPLOITING

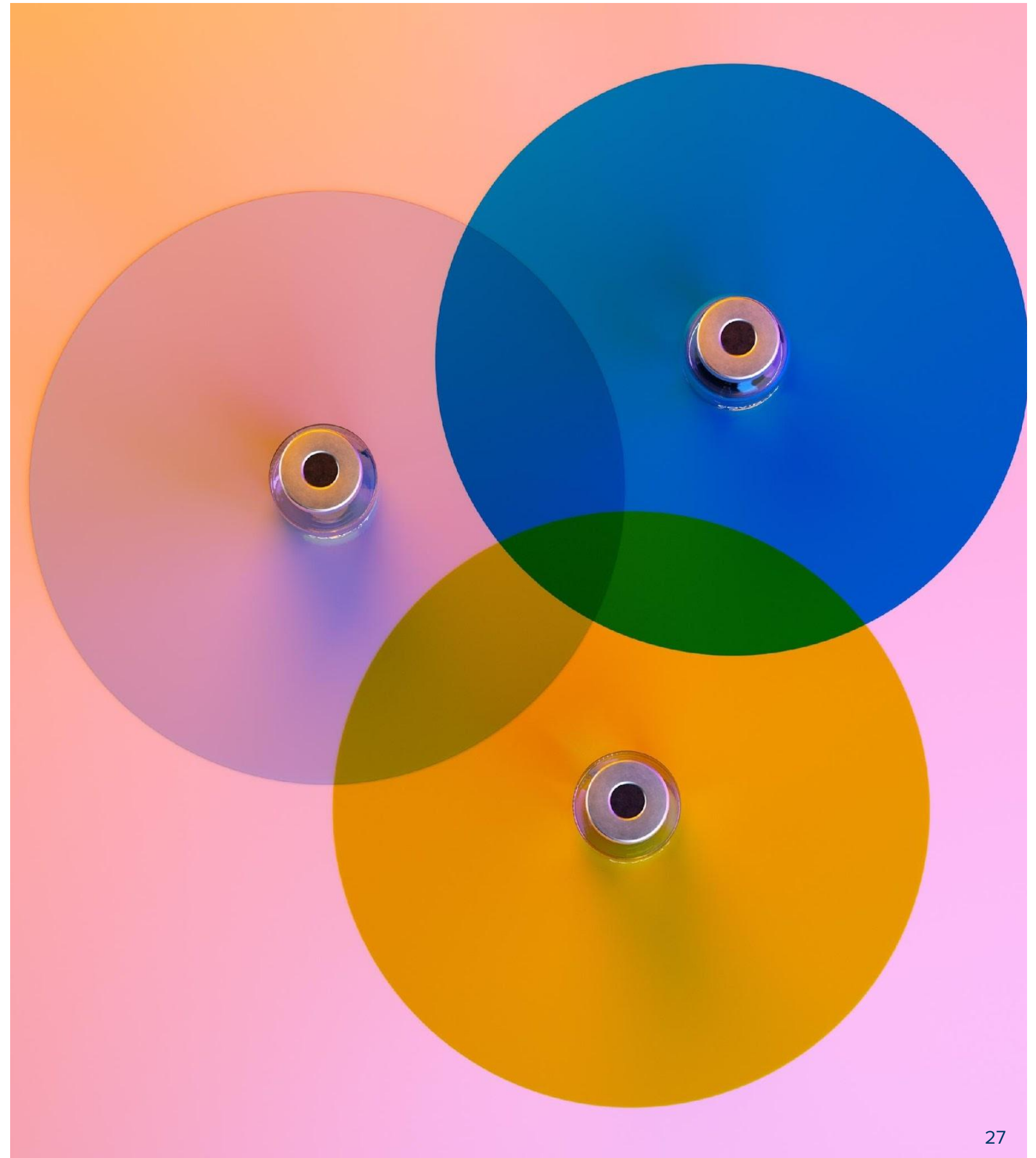
digital platforms to expand engagement and reach.



CONCLUSION

COVID-19, the impetus for a Pharma Brandemic that aroused consumer engagement in healthcare and pharmaceutical choices, has an uncertain future. Some scientists believe future variants will morph into a seasonal respiratory illness like the flu, while others predict a more deadly variant that combines the virulence of delta and the transmissibility of omicron.

What is certain is that the biggest worldwide vaccine campaign ever – with 77% of the American population having had at least one shot as of June, 2022 – has forever influenced how consumers see and relate to pharmaceutical companies and brands. As a direct result of pandemic-related information and conversation, consumers are more aware of pharmaceutical company names and reputations, more confident about making their own healthcare choices, and more willing to challenge medical experts and authorities. They are also more vulnerable to making misinformed healthcare decisions because of skyrocketing health misinformation.



THIS PRESENTS A **SHORT AND URGENT WINDOW** OF OPPORTUNITY FOR PHARMACEUTICAL COMPANIES.

With a public this intensely engaged in matters of health, Pharma can play a beneficial and reputation-enhancing role by:

1 ACTING AS HEALTH INFORMATION BROKERS

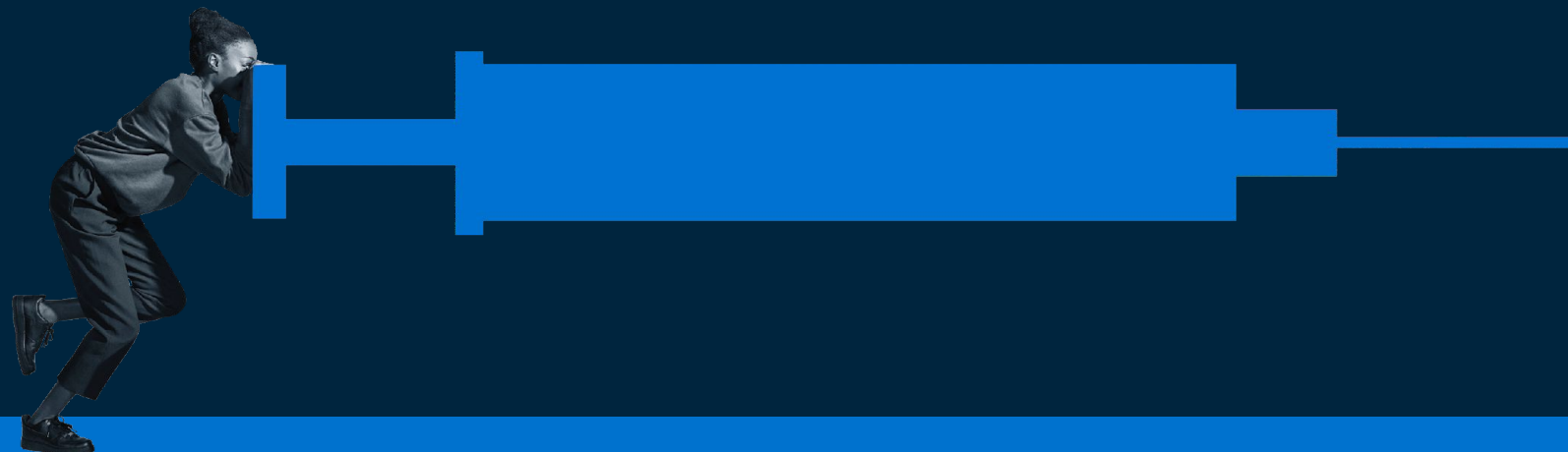
providing tools and techniques for patients and physicians to interact more productively and collaboratively about health choices – restoring respect for the expertise and recommendations of healthcare professionals, while giving voice to more informed, engaged patients.

2 MARKETING MORE LIKE LIFESTYLE BRANDS

acting on consumer feedback with an emphasis on personalization, using simple language and bold graphics so everyone understands, featuring human stories so everyone relates, reflecting a purposeful mission and values, and showing up creatively and meaningfully so consumers respond and engage.

3 ADDRESSING HEALTH MISINFORMATION HEAD ON

dispelling myths and misinformation through a steady drumbeat of evidence-based information in simple, culturally-sensitive language, delivered by trusted messengers across the full range of media, social media, and in-person platforms, and partnering with community groups to ensure local populations are reached successfully at the grassroots level.



The Pharma Brandemic has created an unprecedented opportunity for pharmaceutical companies and brands. Winners will rise to the challenge of challenger patients and turn their curiosity, knowledge, and engagement into a mutually beneficial healthcare dynamic that leads to better health outcomes.

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PHARMA BRANDEMIC

TO FIND OUT HOW THE
PHARMA BRANDEMIC IMPACTS YOUR
BRAND OR ORGANIZATION, VISIT US AT
mboothhealth.com

