

TAKING THE PULSE[®] EUROPE

Opportunities for Physician Marketing in the Networked European Economy

Italy ▪ Spain ▪ France ▪ Germany ▪ United Kingdom

- The Online Channel Is Preferred
- Physician Portals as a Primary Access Point
- Is eDetailing Replacing the Rep?
- Corporate Portals Have Reached Critical Mass
- Email Now Presents a Viable Marketing Opportunity

manhattanRESEARCH

January 2007

Taking the Pulse[®] Europe White Paper
Copyright © 2007 Manhattan Research, LLC.
All Rights Reserved.

The Online Channel Is Preferred Electronic Sources of Rx Info Are Just as Important Today

Although most European physicians (57%) place a primary importance on the sales rep as a source of information about new and existing prescription products, 50% of surveyed physicians in Europe (physicians in Spain, France, Germany, Italy, and the UK were included) report they have a preference for receiving information via email, webcasts, podcasts, or product sites directly offered by a pharmaceutical company. When comparing the various online sources, those interested in information via email as a source represent the largest subsegment. Although physicians still place great importance on the rep relationship and rely on reps to offer personalized service and immediate answers, it is increasingly clear that the online channel has the potential to provide relevant information for a large physician audience today.

What does this mean for companies interested in how this will – or should – impact their sales and marketing strategy in the coming years? The short answer is that they must meet the demand and invest in content so that physicians may access product information, news, and clinical updates via online channels. Beyond the first stage of investing in the online content – only then can companies truly evaluate moving into more evolved strategies such as facilitating customer service and, eventually, connectivity services for their physician audience.



Physician Portals as a Primary Access Point Local Gateways Are a Key Resource for European Physicians

One of the most common and frequent activities conducted by European physicians online is the use of portals intended for a physician audience. These portals are akin to WebMD/Medscape or Up-to-Date in the U.S. market – however, the portals favored by European physicians tend to be much more local in nature.

While some European physicians do access U.S.-based websites, by and large, European physicians tend to prefer websites developed specifically for their individual country. For instance, one of the most commonly used websites in the UK is Doctors.Net (doctors.net.uk), while physicians in Spain favor *DiarioMedico* (diariomedico.es).

However, one portal that does transcend the country barrier – precisely because it provides separate sites for each individual country – is Merck's *Univadis* portal (univadis.com).

These findings reveal that when seeking to target a European audience, local content is key. While many European physicians do speak or read English, even native English speakers in the UK report that they prefer to access content created for their country

specifically. These findings tell us that companies may want to expend the additional effort to develop country-specific or culturally-specific content, instead of launching pan-European portals, or even simply translating the same content within a given site. Physicians rely on, and appreciate, unique local content.

Is eDetailing Replacing the Rep? Electronic Detailing Has Limited Adoption in Europe Today

While the market for electronic detailing in the U.S. has reached nearly a point of saturation at roughly half of all practicing physicians, the European market is in an early stage of development and adoption. In fact, less than 15% of European physicians have participated in an electronic detailing program today, a number that has remained statistically stagnant year over year.

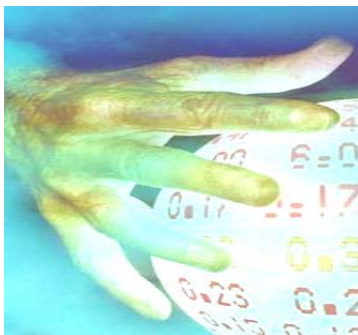
However, this is not a factor of lack of interest on the part of European physicians – who in many cases are not even familiar with electronic detailing as a concept – but rather, a limited supply of programs being offered to physicians in Europe. That said, the electronic detailing market in Europe does have a few companies acting as active players – with Pfizer and Lilly driving the majority of market share today.

This limited awareness and supply of electronic detailing programs in Europe demonstrate a unique market opportunity which exists in Europe today. Whereas many physicians in the U.S. have been inundated with electronic detailing invitations over the past few years, the market is relatively untapped in Europe currently, allowing savvy, ahead-of-the-curve companies to capitalize on physician interest at a time when electronic detailing is still somewhat of a novelty.

Corporate Portals Reach Critical Mass Sites Serve as Resource for Product and Treatment Info

According to the latest findings from Manhattan Research, just under half of European physicians (UK, France, Germany, Italy, and Spain) report visiting a corporate website for a pharmaceutical company. The clear market leader in Europe is Novartis — followed closely by Pfizer. Other leading sites included Sanofi-Aventis, Roche, and Merck. Although market reach for individual corporate sites remains somewhat limited today (at least when compared to the scope of sales force interactions), an important factor in this discussion is that some of the leading sites are now engaging 150,000 or more physicians via their European corporate sites on a regular basis. When taking into account how much is typically spent to get the attention of each individual physician via the sales rep or through promotional spend, the economics and the cost per interaction online become very compelling to strategic market planners.

However, despite the impressive reach of some of the leading corporate websites in absolute terms, physicians in Europe are saying these destinations have significant room for improvement with regards to meeting their professional needs. Although



some sites are able to meet the expectations of their visitors, the majority of corporate destinations fall below the midpoint and are not meeting the needs or expectations of these highly engaged and motivated physician visitors online. Only when companies begin to account for the true size of the physician audience, and how online channels impact offline decision making, will they begin to see the logic in making increased investment in these corporate gateways which in due time will also serve as e-communication and eventually customer service destinations.

Email Presents a Viable Marketing Opportunity European Physicians Express High Reliance on Email Newsletters and Information

Nearly 80% of European physicians report that they subscribe to some form of medical or professional email newsletters, with the average physician reporting up to six newsletter subscriptions — demonstrating high penetration and reliance of this population on email as a form of easy information gathering.

When asked about the newsletters to which they subscribe, physicians again tend to favor local news and information sources. However, Merck's Univadis actually captures the highest number of subscriptions across all of Europe by a large margin, with subscribership splintering after this source.

European physicians are clearly amenable to receiving worthwhile news and information via email. In fact, they are most likely to have subscribed to an email newsletter published by a pharmaceutical company. With



nearly one-third of European physicians separately reporting they would prefer to receive updates about new pharmaceutical products and indications via email, newsletters and email content present a unique and low-cost opportunity for targeting European physicians today.

— Manhattan Research

Taking the Pulse® Europe is a syndicated, multi-client research study of physicians in the United Kingdom, Germany, France, Spain and Italy. The primary focus of the study is technology adoption and integration in physician practices across Europe.

Taking the Pulse® Europe v6.0 was fielded in 4Q2006 among 1,000 practicing physicians using a random digit dial telephone methodology and was conducted in English, Spanish, French, Italian, and German.

For additional information or to subscribe to the service, contact Manhattan Research.

+1.888.680.0800
sales@manhattanresearch.com