



Consumers and Web 2.0

Five Action Items for Pharmaceutical, Biotech, and Device Marketers

- 1 Formalize a Web 2.0 Policy
- 2 Understand Your Audience
- 3 Courting the Consumer Opinion Leaders
- 4 What's Your Wikipedia Strategy?
- 5 Creating Content for Cyber-Savvy Consumers

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Introduction

A recent review of the top questions asked by Manhattan Research clients in the past few months pointed to a resounding theme — pharmaceutical companies large and small are clamoring to answer the question, “What should pharma be doing about Web 2.0?”

There are, of course, many ways to answer this question — and the answer varies greatly depending on the cultural fabric of each company, the product or target population in question, and the goals of a specific brand. But there are some general guidelines that pharmaceutical, biotech, and device companies can use as a framework for identifying a Web 2.0 strategy for themselves.

The first question to address is what exactly “Web 2.0” means in the first place. In its true definition, Web 2.0 is defined by the use of user-generated and user-contributed content and technology — but the term has evolved colloquially such that it now encompasses any sort of “new media” that goes beyond straight content sites, or search and banner advertising.

Of course, the idea of leveraging user-generated content, which is the very core of Web 2.0, presents a variety of logistical and legal difficulties for pharmaceutical companies right from the start. With stringent regulatory requirements surrounding indications, efficacy claims, and adverse events, it is understandably difficult for pharma to get its collective head around the concept of creating — or even reading — truly collaborative online content.

However, not all pharmaceutical companies are shying away from user-generated content online. Merck was ahead of the pack in getting a page up on Facebook (its “Take a Step against Cervical Cancer” group has over 44,000 members as of this writing), while Bayer Healthcare has hosted a support community for Multiple Sclerosis at ms-gateway.com for years. Companies such as Genentech are advertising on dailystrength.org, and countless other companies have engaged research firms to monitor blogs and report back findings about consumer views of the product. It is clear that wading into Web 2.0 must not be quite as risky as many might think.

There are a few “basics” of Web 2.0 that any pharmaceutical marketer or executive should be aware of, and actively seek to address. Using this framework as a foundation for establishing a more robust Web 2.0 plan of attack, companies can be sure they are harnessing the power of the Internet to stay in touch with their consumers.



Formalize a Web 2.0 Policy

Guess what? They're talking about you.

This is one of the very basic tenets of our Web 2.0 world — someone online is talking about pretty much anything you can think of — and your products and services are most certainly part of this dialogue. A quick glance at sites like CrazyMeds (<http://www.crazymeds.us>) or HealthBoards (<http://www.healthboards.com>) shows just how active online communities are in discussing treatment options — and how much credence fellow members have in the opinions of certain members of the community.

There are many benefits to monitoring online conversations. First, by listening to your customers, you gain valuable market insight that is usually only available from extensive focus group testing. Second, you have your ear to the ground, so to speak, to listen to your customers' concerns — and you even have the opportunity to respond, if appropriate, and build a relationship with these customers or potential customers. Companies spend millions of dollars to identify these valuable consumers — but here they are, presenting themselves to you, just a keyword search away. That said, many companies have a hard time figuring out what their obligation is when it comes to adverse event reporting when monitoring user-generated content. In the absence of clear guidelines on this issue, there is a pervasive air of "adverse event creep" that is paralyzing many companies from monitoring (or even looking at) messageboards, blogs, communities, and social networks. It is critical that companies develop guidelines for online content monitoring, including clarification on what constitutes a reportable adverse event (does knowing "misstrixie72" experienced a side effect really constitute having "personally identifiable" information?). Companies should also develop suggested measures which brands can (and should) take in monitoring online conversations. By developing guidelines surrounding how to monitor, respond to, and solicit user-

generated content, companies will be putting measures in place to prevent against liability for employee action (or inaction), while also empowering the individual brands to be more creative in the types of initiatives they can undertake, rather than being paralyzed by a fear of the idea being rejected.

Action Item #1

Develop company-wide policies for monitoring and responding to user-generated content in message boards, communities, and social networks.



Understand Your Audience

Recent studies from Manhattan Research also reveal that certain therapeutic segments are more active than others in starting and participating in conversations online, highlighting that detailed segmentation is critical to understanding the online information-gathering behavior of a target audience.

There are three questions every marketer should be able to answer about his or her target population:

- What percent of my customers are using the Internet for health information?
- Which online sources do my customers find most relevant and reliable?
- To what degree is my target audience engaged in using Web 2.0 content, resources, and networks?

The Web 2.0 Engagement Index below can help marketers answer some of these questions and identify key audiences which

are actively contributing to the world of online discourse surrounding healthcare, treatments, and outcomes.

Web 2.0 Engagement Index

Condition	Index
Adult ADD/ADHD Patients	2.2
Fibromyalgia Patients	2.0
Emphysema Patients	1.7
Anxiety/Social Phobia Patients	1.5
Inflammatory Bowel Disease Patients	1.5
Cancer Patients	1.4
Migraine Patients	1.3
<small>Index for All U.S. Adults is 1.0. Source: Manhattan Research Cybercitizen® Health v7.0</small>	

Action Item #2

Consumer reliance on Web 2.0 content and media varies based on age, gender, and therapeutic condition. It is critical to have a detailed understanding of the media sources used by your target audience in order to develop an effective and comprehensive Web 2.0 strategy.



Courting the Consumer Opinion Leaders (COLS)

Pharmaceutical companies have long courted the physician Key Opinion Leaders whose opinions influenced the decisions of their peers. With the explosion of user-generated content online, the Web has created thousands of self-made key opinion leaders on virtually any subject — including healthcare — and companies would be wise to start courting these key opinion leaders, too.

Marketers devote substantial time and money to identify and target "influencers" in

the consumer population — and very often the consumers who write blogs or post on community sites are these same influencers who have an extended impact on friends, family, and, of course, those reading their comments online.

According to a recent study from Manhattan Research, an estimated 20 million people use messageboards, communities, and blogs for health information today. The moderators, bloggers, and frequent posters within these online communities are expert resources who are in some cases on par with the physician in terms of perceived trustworthiness and insight. Therefore, it is important to understand the full range of media outlets — including blogs — that your target audience is using. For instance, if there is a consumer or physician blog your target audience favors, such blogs should be seen as media outlets that are just as powerful and influential as any reporter in a print publication.

Action Item #3

Be sure your PR outreach efforts take online consumer opinion leaders, such as blog authors or community messageboard moderators, into account.



What's Your Wikipedia Strategy?

A recent Manhattan Research study found that Wikipedia is one of the most popular health information seeking sites used by consumers in many countries in Europe. In the absence of a “WebMD” in their language, Wikipedia is the best one-stop-shop some European consumers have available to them for health information. In the United States, we see Wikipedia emerging as more and

more of a go-to resource for consumers and physicians alike.

Since Wikipedia content is user-generated, it is important for companies to monitor Wikipedia entries for their products to ensure the content is accurate and up to date. However, bear in mind that the world is watching what you edit: Some companies came under fire recently when it was discovered that side effect information was removed from the Wikipedia entry of a company's product from a company-owned computer.

To fully appreciate just how public your Wikipedia edits are, try typing your company's name into WikiScanner (<http://wikiscanner.virgil.gr>) to see what your co-workers are editing on Wikipedia. For instance, a quick search shows that some of the top ten pharma companies are home to Wikipedia aficionados on topics such as professional wrestling slang, the history of handheld game consoles, and a wide variety of Marvel comics.

This cautionary tale further highlights the need for company-wide policies on user-generated content. It is clear that companies should play an active role in updating content on Wikipedia — it is an increasingly popular source used by physicians and consumers around the globe. But it is also necessary to have clearly communicated guidelines in place for doing so to make sure any edits made will pass muster in the world of Wiki scanners.

Action Item #4

Does your company have a policy in place for monitoring and editing Wikipedia entries? If not, it should!



Creating Content for Cyber-Savvy Consumers

A final lesson that marketers should keep in mind when considering the effect of Web 2.0 on marketing plans is to develop content that is in line with the types of content consumers expect online today. One example is to make content interactive and to leverage rich media when appropriate — make TV commercials available on your site (they're already on YouTube), and if you have instructions for taking a product, make it a video with a nurse or doctor instead of a simple diagram.

It is also important to keep in mind the degree to which consumers expect up-to-the-minute content. One of the top reasons consumers report for visiting a product site is that they read an article about the product — yet many companies do not update their product websites as soon as news is released. Your product site should be as current as your customer's My Yahoo! page — so make sure you have an action plan in place to address breaking news on your product site.

Action Item #5

Create content that is in line with the expectations of today's cyber-savvy consumers by leveraging the power of rich media and updating content on your network of sites as soon as any new news is released.

Five Action Items for Pharmaceutical Marketers

- 1 Develop company-wide policies for monitoring and responding to user-generated content in messageboards, communities, and social networks.
- 2 Consumer reliance on Web 2.0 content and media varies based on age, gender, and therapeutic condition. It is critical to have a detailed understanding of the media sources used by your target audience in order to develop an effective and comprehensive Web 2.0 strategy. The Manhattan Research Web 2.0 Engagement Index identifies some of the top conditions engaging with Web 2.0 content today.
- 3 Be sure your PR outreach efforts take online consumer opinion leaders, such as blog authors or community messageboard moderators, into account.
- 4 Does your company have a policy in place for monitoring and editing Wikipedia entries? If not, it should!
- 5 Create content that is in line with the expectations of today's cyber-savvy consumers by leveraging the power of rich media and updating content on your network of sites as soon as any new news is released.

ePharma Consumer® is a syndicated, multi-client research study of adult consumers in the United States who look online for pharmaceutical information.

ePharma Consumer®v7.0 was fielded in 2007 among 5,112 U.S. consumers.

Cybercitizen® Health is a syndicated, multi-client research study of the general population of adult consumers in the United States.

Cybercitizen® Health v7.0 was also fielded in 2007, among 4,322 U.S. consumers.

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