

## European Pharmaceutical Marketing in 2008

### Five Emerging Trends about European Consumer and Physician Use of New Media



1. Connecting to Physicians, on Their Terms
2. Leverage E-detailing as a Sales Force Supplement
3. Online Physician Portals Evolve into Clinical Resources, Beyond News
4. Empowered European Consumers Speak with Their Physician about Information Found Online
5. In the Absence of Direct-to-Consumer Advertising, Online Content Is Critical

**manhattanRESEARCH**

white paper derived from  
Cybercizen® Health Europe  
and Taking the Pulse® Europe

copyright© 2007, Manhattan Research, LLC  
all rights reserved

The European market trends outlined in this white paper are derived from two multi-client research studies currently available from Manhattan Research.

Cybercitizen<sup>®</sup> Health Europe is a syndicated multi-client study and advisory service focused on key research topics and trends impacting the European consumer health marketplace. The study was fielded online among 4,302 European consumers from the United Kingdom, Germany, Spain, Italy, France, Belgium, Sweden, the Netherlands, Poland and Portugal. The survey instrument was presented in the native language of each individual country. Cybercitizen<sup>®</sup> Health Europe identifies and analyzes the behaviour, attitudes and demographics of the consumer population who use technology and the Internet for health purposes, as well as further segmenting the population by therapeutic area, technology utilisation, and motivation.

Taking the Pulse<sup>®</sup> Europe is a syndicated multi-client study and advisory service focused on research topics and trends impacting European physicians. The study was fielded by telephone among 1,000 European physicians from five countries: the United Kingdom, Germany, Spain, Italy, and France. The survey instrument was presented in the native language of each individual country. Taking the Pulse<sup>®</sup> Europe provides pharmaceutical and healthcare companies with key data and insight about the evolving nature of physician channel mix, media and technology usage, and healthcare information with the goal of helping companies understand how physicians across Europe access health information.

In addition to the core data, subscribing clients have access to the Manhattan Research analyst team and the ability to request country-specific therapeutic and specialist segmentations.



## Connecting to Physicians, on Their Terms

Traditionally, pharmaceutical companies had a limited array of sources available to them to communicate with physicians — the sales force, dinner meetings, conferences, and sponsorships. But today's European physician is media savvy and interested in receiving content from a wide variety of professional information and clinical news sources. Pharmaceutical companies, accordingly, must update their relationship marketing plans to take evolving communication preferences into account when providing new product information, clinical alerts, or product updates in general.

For instance, European physicians are clearly amenable to receiving worthwhile news and information via email. Nearly 80% of European physicians report that they subscribe to some form of medical or professional email newsletters today, with the average physician reporting more than six newsletter subscriptions. This demonstrates the high penetration and reliance of this population upon email as a form of easy information gathering.

Furthermore, given nearly one-third of European physicians report 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 and prescribers today.

Another growing opportunity in Europe is to communicate with physicians via SMS (text) messaging. Nearly half of European physicians report sending or receiving text messages for professional purposes, and over one-fifth report receiving SMS messages from pharma companies or reps. While routine information may not be well-suited to SMS delivery, urgent or time-sensitive information such as event updates, alerts about new products or indications, or meeting reminders could provide a value-added service to the physician. It is now, more than ever, critical for companies to understand how physicians prefer to access information, and update their customer relationship management (CRM) strategies to reflect these preferences.



## Leverage E-detailing as a Sales Force Supplement

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 still in an early stage of development and adoption. In fact, only 15% of European physicians have participated in an electronic detailing program today, a number that has remained statistically stagnant year over year.

However, lack of interest is not a factor 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. In fact, almost half of European physicians are not even familiar with electronic detailing as a concept today. That said, the electronic detailing market in Europe does have a few companies acting as active players — with Pfizer and GlaxoSmithKline (GSK) 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 capitalise on physician interest at a time when electronic detailing is still somewhat of a novelty.

One of the major drivers, which has encouraged companies such as Pfizer and GSK to take advantage of electronic promotional opportunities, is the positive effect e-detailing tends to have on the physician's overall time spent with a sales representative from a given company. Although the sales force initially looked at e-detailing with skepticism, wondering if online promotion would render the traditional sales call obsolete, most reps are actually seeing the opposite effect — that the e-detail actually increases the overall time spent with the rep. The office visit takes on a new life in the context of a growing array of clinical information sources — online and offline. Results from the recent Manhattan Research study Taking the Pulse® Europe corroborate these findings, showing that physicians participating in edetailing are more likely to

report they spend more time with a rep as a result of an e-detail, as opposed to taking away time from the rep as a result. Savvy, ahead-of-the-curve companies across Europe are capitalising on e-detailing as a low-cost opportunity to increase physician engagement and improve the overall sales call quality.



## Online Physician Portals Evolve into Clinical Resources, Beyond News

Traditionally, physicians relied primarily on local content sources for online medical information, such as *DiarioMedico* in Spain and *Doctors.net* in the UK. One notable exception of a site that has transcended the country divides has been the *Univadis* portal from MSD (Merck Sharp & Dohme). For years, *Univadis* was (and continues to be) the leading portal for physicians across Europe by providing content created specifically for the individual country, in said country's language. The success of *Univadis* has not gone unnoticed, and pan-European content sources for physicians are continually emerging and gaining traction among European physicians.

New examples continue to emerge. *WebMD* recently announced a partnership with *Medcenter* to offer its *Medscape* content to physicians in Spain and in Portugal [www.medcenter.com/medscape](http://www.medcenter.com/medscape), while *United Business Media's SearchMedica* [www.searchmedica.com](http://www.searchmedica.com) continues to expand its offerings in a variety of languages and specialties.

In order to successfully develop content to be used by physicians across Europe, companies must devote special effort toward creating local content in the local language. Putting up one site in English and hoping to gain traction across countries is a strategy that has consistently proven to be doomed for failure. With regard to reach and frequency, as the frequency of professional activities online continues to increase year after year, the forecast is that the demand for portals from content providers and pharmaceutical companies will continue to grow for years to come. Of course building a site and engaging traffic are two different things — engagement requires relevance, timeliness, and, naturally, letting visitors know you exist through appropriate online and offline promotional support.



## Empowered European Consumers Talk to Their Physician about Information Found Online

The Internet's role is increasing in the patient-physician relationship and having an impact on which treatment decisions are being implemented. Still, the physician clearly remains the ultimate voice on this front. Be they the "cyberchondriacs" or the "cyber savvy," consumers in Europe are turning to the Internet for self-education, symptom checking, prescription medication comparisons, and disease education. Not content to just read up or become educated for personal fulfillment, millions are taking the next step to take that information with them to the physician office visit.

Nearly 150 million European consumers in the ten countries studied have accessed health information online; close to 100 million report they are talking about such information with friends and family. And, almost 50 million are talking with their personal physician as a result of the information they researched online. What other channel is driving 50 million consumers to initiate a conversation with their physician today? Although traditional mass media is clearly providing access to disease awareness for very large audiences, the strategic value of the online channel in Europe is clear — the audience is there and waiting.

Another strategic value of the online channel is to provide content that may not be possible through other traditional media channels such as TV and print. For example, companies seeking to educate patients about cancer diagnosis and innovative treatment options may ultimately come to the conclusion that the online channel often provides some of the most efficient access to a targeted audience of disease information seekers. Finally, capturing information at the point of engagement, such as immediately after diagnosis, can provide an opportunity to build a relationship and can truly drive a patient CRM relationship program that may continue for months or years to come.



## In the Absence of Direct-to-Consumer Advertising, Online Content Is Critical

European consumers have been a long-neglected piece of the strategic puzzle for most marketers at health and pharmaceutical companies. Yet, signs increasingly point to the degree to which European consumers are, in fact, researching health information and treatment options, and ultimately taking action as a result of those information searches — as outlined in the trend above.

When it comes to where European consumers are going to gather health information online, one trend is evident: The content must be local. Not surprisingly, language plays a major role in driving consumers to sites and content within their local market — also making a pan-European site difficult to achieve.

Within each of the ten countries, specific sites with local content emerged as the content leaders — with one surprising site mentioned across a number of the ten countries surveyed: Wikipedia. In the absence of major health portals with accredited content in many of the countries surveyed, consumers are turning to sites such as Wikipedia as a local content source with up-to-date information. Companies would be wise to ensure their products are adequately represented within Wikipedia entries across the various countries, and to also survey condition-specific treatment entries to certify that available options are presented accurately and completely. Of course, as some companies have learned — be vigilant in how you approach editing or altering Wikipedia content online. Ensuring complete content is one thing but selective removal of content is clearly another.

Additionally, given this dearth of country-specific health content in many European countries, companies can fill the gap of unmet demand by providing disease education content online. In a world of limited choices, even basic information is often met with enthusiasm by those seeking the latest diagnostic and treatment information about a condition.



For more information

[www.manhattanresearch.com/2008EUTrends.aspx](http://www.manhattanresearch.com/2008EUTrends.aspx)

t: 212.255.7775

e: [sales@manhattanresearch.com](mailto:sales@manhattanresearch.com)