

Cybercitizen® Health Europe v8.0

Connecting with Europeans Online for Health:

Digital Marketing Strategies for Building Consumer Relationships



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Introduction

Building relationships with healthcare consumers can be challenging as a result of the strict regulations around direct-to-consumer pharmaceutical advertising in European countries. Brand teams have traditionally focused most of their effort on reaching physician audiences, but the increasing importance of the Internet in the health and treatment decisions of both physicians and patients opens up a new world of promotional opportunities for European marketers. Over 150 million European adults researched health information online over the past year, and the sources they find are ultimately affecting how these consumers manage the health of themselves and their families. Consumers are even using online resources to empower their relationships with doctors and to take more of a role in making treatment decisions, with many reporting to discuss health information they find online with their physicians.

In light of these trends, healthcare marketers are looking for ways to leverage new media to better connect with and serve consumers. But as consumers rely on a variety of resources to support their healthcare decisions and new media channels emerging all the time, it's a challenge to determine the best marketing mix. Brand teams and agencies need to know which marketing strategies and media campaigns will be most effective in reaching and influencing target consumers and the amount of budget and resources to devote to them.

Over 150 million

adults online for health info

Over 70 million

adults online for pharmaceutical info

Among adult consumers in the 10 countries surveyed: Germany, the United Kingdom, Spain, Italy, France, Belgium, Sweden, Poland, the Netherlands, and Portugal

Manhattan Research's Cybercitizen® Health Europe research and advisory service provides key market data, trends, and strategic analysis around the behaviours, attitudes, and future interests of European consumers using the Internet and other technology for healthcare - with the goal of enabling companies to make better informed decisions when planning and executing marketing strategies. The study specifically looks at consumers in the United Kingdom, France, Germany, Spain, Italy, Belgium, Sweden, the Netherlands, Poland, and Portugal.

The following paper outlines strategies for healthcare and pharmaceutical companies looking to take advantage of trends in the European consumer healthcare market. To learn more about how Manhattan Research can help you connect with target audiences in specific countries and condition groups, contact sales@manhattanresearch.com.

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Satisfy Online Health Seekers with Informational Content

Almost 90% of online adults in Europe rely on the Internet to help manage their health and wellness, and over 70 million are researching pharmaceutical information. Although more advanced Web 2.0 health activities like online support groups are gaining recognition, consumers are most likely researching symptoms, diseases, treatments, or other healthcare topics. And the content they find is undoubtedly impacting the healthcare decisions of themselves and their families. In fact, the Internet influences online consumers' healthcare and medical decisions more so than television, radio, books, magazines, or newspapers.

When health issues occur, online consumers in Europe are more likely to first turn to the Internet than to go directly to their doctor.

Without direct-to-consumer advertising or local product sites, many European healthcare consumers look to corporate pharmaceutical sites as health resources. Bayer, Roche, and Pfizer led the pack in terms of traffic, and visitors reported to access these sites specifically for health and treatment information.

Top 10 Global Pharmaceutical Corporate Sites	
Ranked by Number of European Consumer Visitors	
Position	Company
1.	Bayer
2.	Roche
3.	Pfizer
4.	Novartis
5.	Johnson & Johnson
6.	GlaxoKlineSmith
7.	Sanofi-Aventis
8.	Schering AG
9.	Boehringer Ingelheim
10.	AstraZeneca

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Corporate and brand marketing teams should look for opportunities to build relationships with these consumers through content marketing. A well-kept, useful health or condition resource center will convert them to become regular visitors and enhance brand relationships. Also, language plays a major role in determining the health sites that consumers across Europe frequent, so companies should pay attention to local markets and provide disease education content in the respective language of a specific country portal.

Capture the Millions of European Consumers Using Search Engines

With the lack of comprehensive, language-specific health portals across European countries, search engines are critical tools for consumers seeking medical information online. Many online consumers report that when retrieving general health information from the Internet, they first go to a search engine over a health website. When looking at the conditions that consumers research most through any means, understandably they tend to be those with high incidence rates, those that may have a stigma attached, and those that require complex or high-maintenance treatment programmes.

Top Conditions Researched Online

1. Allergies
2. Depression
3. Migraine
4. Trying to quit smoking
5. Cancer
6. Diabetes
7. Acid Reflux/Chronic Heartburn
8. Hypertension
9. Insomnia or Sleep Disorder

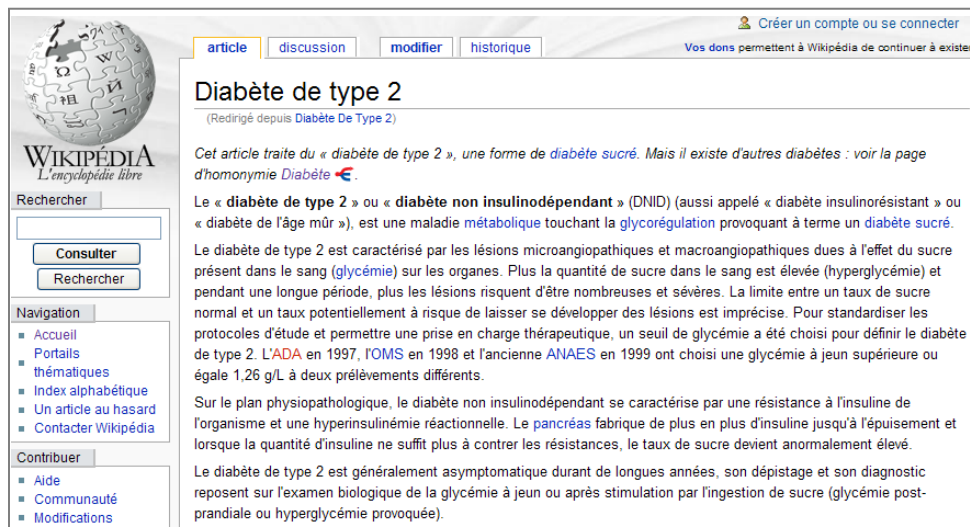
A well-executed search engine marketing programme can help marketers reach the growing population of healthcare searchers. When it comes to natural search, quality health and medical content, in addition to the aforementioned purpose of serving consumers, is fodder for search engine spiders. Of course, a variety of on- and off-site factors affects the success of a campaign, but a site rich with optimized content has a better chance of being “found” than one without. Also, language plays an extremely important role in programmes that span across the European market. Though a campaign may be managed at a global or regional level, it’s necessary for strategies to reflect not just different audiences’ respective languages, but also their vernacular, slang, alternative spellings, common phrases, and other cultural considerations that may affect search queries.

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Form a Wikipedia Strategy

Across all of the European markets surveyed, country-specific sites with local content emerged as leaders in terms of visitation by consumers seeking health information online. One site, though, was mentioned by consumers throughout Europe as a top health information destination – Wikipedia.

This collaborative encyclopedia is filling the gap as a local and up-to-date resource in the many countries that lack accredited health portals. And consumers want companies to take a role in making sure that Wikipedia content can be trusted – the majority of online European consumers expect that pharmaceutical, biotech, and medical device companies monitor Wikipedia pages about their products.



Marketers should make sure that their brands and products are accurately represented within Wikipedia entries across local European markets, and to ensure that the treatment options listed in disease entries are correct and complete. When monitoring and editing Wikipedia, companies should make sure that their efforts only go so far as to verify accuracy and completeness – selective removal of negative content, if factually correct, can spark consumer and media disapproval.

Conclusion

As online health resources continue to expand and more Europeans turn to the Internet for support and information, healthcare and pharmaceutical marketers must pay attention to the role that new media plays in the marketing mix. Using online channels to reach and educate consumers about disease, treatment, and product information can help brands become part of the health conversations consumers have with family, friends, and physicians and ultimately affect treatment decisions.

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About Cybercitizen® Health Europe v8.0

Manhattan Research's Cybercitizen® 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 in Q3 2008 among 4,079 European adults.

Cybercitizen® Health Europe v8.0 topics include:

- Overall media consumption
- Frequency and types of Internet access
- Visitation to pharmaceutical company and general health sites
- Search engine reliance and behaviour
- Mobile technology adoption (including MP3/iPods, PDA/smartphones, and SMS messaging)
- Interest in Web 2.0 technologies for health and pharma info (including online video, blogs, podcasting, wikis, and online communities)
- Use and interest in health email newsletters, online support groups, chat rooms, and disease management tools
- Impact of online health information on consumer actions offline
- Use and relative influence of physicians, nurses, pharmacists, friends, and family

Country Segmentations in Cybercitizen® Health Europe v8.0

Quotas of at least 600 consumers

The United Kingdom

Germany

Spain

Italy

France

Quotas of at least 300 consumers

Belgium

Sweden

Quotas of at least 150 consumers

The Netherlands

Poland

Portugal

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Therapeutic Segmentations in Cybercitizen® Health Europe v8.0

The Cybercitizen® Health Europe v8.0 research and advisory service offers data and analysis segmented specifically for the following therapeutic segmentations:

Acid Reflux/Chronic Heartburn

Acne

Allergies

Anaemia

Anxiety/Social Phobia

Arthritis

Osteoarthritis

Rheumatoid arthritis

Asthma

Cancer

Chronic Bronchitis

Chronic Pain

Depression

Diabetes

Type 2 Diabetes

Taking Insulin

Ear Infections

Eczema

Eye Infections

Fibromyalgia

Heart Disease

High Cholesterol

Hypertension/High Blood Pressure

Inflammatory Bowel Disease

Influenza/Flu

Insomnia/Sleep Disorder

Irritable Bowel Syndrome

Migraine

Osteoporosis

Overactive Bladder/Urinary Incontinence

Psoriasis

Restless Leg Syndrome

Trying to Quit Smoking

Current Smoker

Taking HRT

For additional product information: www.manhattanresearch.com/ccheu

About Manhattan Research

Manhattan Research, a Decision Resources, Inc. company, is a leading pharmaceutical and healthcare market research and advisory services firm. By combining key market data from our physician and consumer surveys with analyst expertise, we partner with companies to lead them to better informed healthcare marketing and sales strategies. Our annual research studies include Taking the Pulse®, Taking the Pulse® Europe, Taking the Pulse® Asia, ePharma Physician®, Cybercitizen® Health, Cybercitizen® Health Europe, and ePharma Consumer®. Each study serves a unique purpose and focuses on different aspects of information technology adoption. Broad consumer and physician research is complemented by targeted analysis among 100+ consumer therapeutic and physician specialist segments.

For information about Cybercitizen® Health Europe v8.0 or any of our other research and advisory service products, please contact sales@manhattanresearch.com or call **1.888.680.0800**.