

# GETTING READY FOR PHARMA 2.0

## Trends Covered at the 3rd Annual eMarketing Summit Europe 2008

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Much has changed in the world of technology and marketing over the past several years. The pharmaceutical industry is certainly no exception to these trends as electronic marketing has forced many brand planners to rethink how their target audience accesses, uses and shares branded and unbranded information in the electronic age.

It was only three short years ago when the first eyeforpharma eMarketing Summit Europe was launched to address the key topics and issues that pharmaceutical marketers, strategic planners, agencies, and solution providers were facing as they planned for the future of multi-channel sales and marketing. While some of the topics and issues addressed in the original meeting, such as search engine marketing and e-detailing, are just as fresh today as they were 3 years ago, other trends such as social media and Web 2.0 have just begun to make their impact as companies are not debating if these trends will impact their brand but how they will impact their brand in 2008. In an effort to summarise some of the key issues faced by pharmaceutical marketers online today, this review discusses five e-marketing trends.

### Physicians Prefer a Mix of Media Channels When It Comes to Accessing Rx Information

Most in today's culture expect information on-demand in a variety of formats – and physicians are no exception to the trend. While most European physicians still view pharmaceutical sales reps as the primary source of new and existing product information, half of them report to favour receiving updates on medical education, drug recalls or warnings, new side effects information, new product indications and other topics via online sources. Email proves to be the most preferred vehicle, while podcasts, webcasts and product sites are other channels that are growing in popularity among European physicians.

Armed with this knowledge, pharmaceutical companies should take the opportunity to diversify their marketing and promotional mix in order to best meet physician preferences with regard to information delivery and channel mix. Sales reps are certainly still the most important part of the physician-pharma company relationship, but companies must ensure that product information and updates are available through numerous channels so their messages are likely to resonate with more of today's multi-channel physicians.

### E-detailing Continues to Evolve in the Physician-Pharma Landscape

The reality that less than 20% of European physicians participate in electronic detailing can be attributed more to the relatively small number of e-detailing programmes in Europe rather than to a lack of physician interest in the concept. In fact, over one-fifth of physicians not currently engaged in e-detailing express interest in receiving pharmaceutical sales information through this channel, and an even larger number report that they are unfamiliar with the concept of e-detailing altogether.

For ahead-of-the-curve marketers, e-detailing, which can include diverse approaches such as video-based rep to physician platforms, presents an opportunity to make a strong impact on European physicians in the coming years. According to data from Manhattan Research, many European physicians actually report that an e-detail

increases their overall time spent with a doctor, proving that establishing an electronic detailing programme can be cost-effective way to increase physician engagement and has the potential to optimise overall sales call quality over time. That said, getting the message, timing, delivery and execution right is essential to success in the realm of e-detailing – just offering an e-detail for the sake of offering one, or simply repurposing print content for the Internet, is typically not in the best interest of anyone involved.

### Search Marketing Opportunity Grows as More Europeans Search Online for Health and Rx Info

With almost 150 million European adults going online for health and pharmaceutical information, websites, blogs, podcasts and the like have become a prime source of health and pharmaceutical content. Search engines play an integral part in this trend for many consumers and physicians, serving as the key driver to their health and pharmaceutical information destination. When retrieving health information from the Internet, almost two-thirds of the time consumers and just over half of the time physicians begin their quest for medical and clinical information with a search engine.

Search engine marketing presents an ideal opportunity for pharmaceutical brands and marketers to reach online health and disease information seekers. Unlike many other types of education and awareness tools that push messages in front of consumers, search engine marketing enables marketers' content to be delivered to consumers and physicians at the exact moment they are looking for it. In many ways this is akin to placing content "in the path" of consumers and physicians who are already looking for targeted medical content as opposed to traditional push channels such as patient education and rep promotion.

Allergies is the top condition researched online in Europe, followed by depression, obesity/weight management and cancer.

Finally, marketers should make sure that if they buy and/or optimise their site for specific keywords and phrases, the content presented to the searcher should relate to his or her health query. For example, a search for "rheumatoid arthritis infusion therapy" should lead consumers to information on treatment comparisons and targeted information rather than to just a general disease or corporate homepage.

### Surge in Mobile Device Ownership among Physicians

Since 2005, mobile device ownership has soared among European physicians – and European consumers in general. Mobile phones are clearly the most popular device, with virtually all physicians and a large number of consumers reporting to own one. Furthermore, MP3 players and PDAs/Smartphones are also very popular with the physician audience, coming in at 46% and 36% ownership rates respectively.

As more and more physicians use mobile devices to communicate on the go, a new communication channel is becoming available for pharma marketers to deliver relevant content and promotional messaging. Nearly half of European physicians report to sending or receiving text messages for professional purposes, and over one-fifth report ever receiving SMS (text) messages from pharma companies or reps. New product and indication alerts, meeting reminders, and event updates are the types of information that are well-suited for mobile delivery and can provide value to interested physicians. In addition to information updates, many physicians are learning to integrate mobile devices into their workflow as a decision support tool – for diagnosis and treatment option comparisons.

About one-third of physicians use their mobile phone, PDA or Smartphone to check e-mail.

### Pharma Marketers Can't Keep Their "Heads in the Sand" Forever When it Comes to Web 2.0

Consumers and physicians alike are engaging in Web 2.0 applications such as social media and community online for personal and professional purposes. In fact, in a recent Manhattan Research study 23 million European adults report they have posted health-related content online, providing pharmaceutical marketers access to an informal focus group to monitor health topics and views important among online consumers. One site that embodies some of the concepts of community online is MS-Gateway.com, Bayer Health Care's global portal for Multiple Sclerosis patients.

It is important to understand that all of the social media fun is not relegated to consumers only. Physicians also report to take advantage of "user" generated medical content. According to Manhattan Research data, 57% of Europeans physicians report they have used information a colleague posted in a message board, chat room or blog as a professional resource for their practice.

In the absence of major health and medical portals in many European countries, both physicians and consumers are also turning to the collaboratively edited Wikipedia as a local source for health and medical information. Pharmaceutical companies should be sure that product information across various countries is represented correctly and that condition-specific treatment entries are presented accurately and completely, but should not prescribe to the practice of selectively removing unfavourable content unless it's inaccurate.

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The European market trends outlined in this white paper are derived from two multi-client research studies currently available from **Manhattan Research**, a leading market research and advisory firm for the pharmaceutical and healthcare industry.

**Cybercitizen® Health Europe** and **Taking the Pulse® Europe** both include syndicated studies and advisory services that provide European pharmaceutical industry leaders the tools to better plan and market existing and future products. Cybercitizen® Health Europe is focused on the key trends impacting how European consumers manage their health, while Taking the Pulse® Europe provides key data and insight into the evolving nature of how physicians across Europe access health information for personal and professional use.

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