

# A new era of



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Digital has changed everything—from the way we think and behave to the products that clients expect from pharma. **James Chase** on the ground rules for thriving in what is now a service industry

**“As an industry we will seek to create ways to support our customers in the management of their overall health and wellness.”**

*Lisa Flaiz, group product director, digital marketing, Janssen Pharmaceuticals*

It doesn't seem long ago that companies only had to start a Facebook page, or bash out 140 unbranded characters a day to qualify for a “We Do It Digitally” bumper sticker. That won't cut it anymore.

Forget channels and devices for the moment; digital's biggest impact is a social one: widespread behavioral change. Digital has changed the way humans think, behave and interact. If you're in pharma, this has probably turned your world upside down. People want different things: they want help managing their conditions, and information on treatment options. Because all of pharma's different audiences—HCPs, pharmacists, payers, investors, etc.—also comprise people, they too will want different things.

Make no mistake, pharma is now a service industry. Lisa Flaiz, group product director, digital marketing at Janssen Pharmaceuticals, sees this as an opportunity. “As an industry we will seek to create ways to support our customers in the management of their overall health and wellness, aligning with their values

# partnerships

and putting a larger emphasis on overall health outcomes. This means increasing our role in facilitating the delivery of healthcare across the entire healthcare supply chain, not just at the pharmacy counter.”

Central to pharma’s transformation are collaboration and cultivating partnerships. Sanofi is reaping the rewards of having embraced this approach. The company entered 2012 on the edge of the industry’s steepest patent cliff. But, wrote *MM&M’s* Matthew Arnold in January, “instead of battening down the hatches, Sanofi set the bar for engagement of external audiences, with innovative digital media programs, a groundbreaking gadget and visionary contests aimed at pulling up-and-coming techies, scientists, patient advocates and non-profits into its orbit.” Essentially, Sanofi is crowd-sourcing its evolution.

So what does the healthcare consumer space actually look like? According to Manhattan Research’s (mR) latest Cybercitizen Survey, 75 million U.S. adults are using mobile phones for health information and tools, up from 61 million in 2011. Meanwhile, tablet health-activity adoption doubled from 15 million to 29 million. Also of note, one in 10 consumers have tracked or monitored their medical measurements electronically to manage a chronic condition.

As for social media, once the buzz darling in digital healthcare, the number of consumers using it for health purposes is leveling off, up by just 2 million in 2012 to 109 million. Meanwhile, more than two-thirds of online consumers report using ratings/reviews websites or services within three months of being diagnosed. The top ratings sites include WebMD User Reviews and Ratings, Drugs.com, Every-dayhealth.com/drugs, Angie’s List and Yelp.com.

mR’s latest ePharma Consumer Survey reveals perhaps the most profound findings. More than 50% of online consumers are interested in using supportive services from pharma, such as condition management programs. The problem is, they report, pharma’s online resources are not necessarily top of mind as a destination, unlike general health sites and hospital and pharmacy digital resources. Also, 30% of online consumers with a chronic condition and 38%

## Consumer Behavior

**75M** U.S. adults are now using mobile phones for health activities, up from 61 million in 2011

**11%** of consumers have tracked or monitored their medical measurements electronically to manage a chronic condition

**51%** of online consumers are interested in using pharma-sponsored supportive services, such as condition management programs

**29M** U.S. adults are now using tablets for health activities, up from 15 million in 2011

**30%** of online consumers with a chronic condition are interested in using pharma-sponsored patient support programs

**109M** consumers are using social media for healthcare purposes, up from 107 million in 2011

Source: Manhattan Research’s Cybercitizen Survey 2012 and ePharma Consumer Survey 2012

of caregivers are interested in registering for a pharma-sponsored patient support program that would give access to a range of services support programs.

It gets even better for pharma: at least three quarters of consumers who have used online resources from pharma report greater confidence in managing their disease and that their prescription in the right one. The problem is, pharma is not yet in all the right places.

In terms of the healthcare professional audience, the iPad and smart phones continue to drive most of the digital activity. For a round-up of HCP digital trends and observations, see “The iPad and Other Drugs” on pages 10 and 11.

Word is that doctors may be slipping down the pecking order in terms of pharma’s digital marketing priorities, behind prescribing nurses, pharmacists and

**Internet Promotional Spend for the Top 5 Rx Brands, 9 months to Sept., 2011-2012**

	2011		2012	
	\$'000	%Tot Spend	\$'000	%Tot Spend
<b>Cymbalta</b>	10,942	5.3	14,018	8.1
<b>Humira</b>	4,205	6.0	5,074	3.3
<b>Cialis</b>	14,835	10.2	10,611	7.1
<b>Enbrel</b>	2,311	2.9	4,533	3.7
<b>Abilify</b>	4,851	5.2	8,353	7.4

Source: Kantar Media

formulary decision makers. Two more mR surveys revealed that not only are pharmacists and formulary decision makers highly active online in their professional roles, but that each reported a strong interest in accessing tools and information from pharma. Again, opportunities are aplenty for the industry.

In this new era, anything is possible if you find the right partners, to which Anne Whitaker, president, North American Pharmaceuticals at Sanofi can attest. “We have a lot of smart people, but we don’t have all the ideas,” she says. “We don’t have the corner on innovation, so collaboration is critically important.” ■