Carolyn Gretton

Marketing WITHOUT WIRES

Pharma marketing in today's digital world requires sound strategy and savvy brand messaging practices that can accommodate new media channels, stakeholders, and segmentation techniques.

TODD SMITH
Horizon Pharma

"There is a need for appropriate measurements specific to these new communication and marketing vehicles, as budget realities require better, more immediate lines of sight on performance, and the ability to assess near and long-term activity."

Throughout pharma history, marketers have always gone where the consumers are — and where they are today, in growing numbers, is on the mobile Web. An estimated 81% of physicians surveyed say they use a smartphone, while 75% specified using an Apple iPhone, iPad, or iPod, according to the Manhattan Research report, Digital Health 2012: Benchmarking Patient Adoption of the Internet and Consumer Electronics for Health.

While healthcare marketers are focusing on digital opportunities to connect with their customers, the variability in digital media adoption depending on patient condition coupled with ROI pressure and prioritization of tactics are driving marketers to leverage more granular customer segmentations.

"Over the past year we've seen increased client demand for data for specific patient and caregiver audiences — and for good reason," observes Maureen Malloy, senior healthcare analyst at Manhattan Research and author of the report. "As digital health matures, we're finding that channel opportunities vary greatly by audience."

Manhattan Research data show that physician adoption of digital media is highly advanced in terms of time online, activities, and use of multiple devices, representing a strong opportunity for marketers to engage their customers. At the same time, analysis shows media preferences and workflow vary significantly between and within various specialty segments, more so than other variables such as age and practice type.

"Physician digital behavior varies in unpredictable ways, making segmentation critical, especially with most brands having to do more with less in 2013," says VP of Manhattan Research Monique Levy.

Remodeling ROI

As digital health continues to transform the marketing landscape, many experts believe it's time for the pharma marketing ROI model to follow suit. Scott Wearley, manager, relationship marketing, at Daiichi Sankyo, notes the proliferation of digital tactics targeting a broad spectrum of customers, typically anonymously, is outpacing how the industry can measure impact.

"While thinking innovatively is Daiichi Sankyo's mantra, proving that these new tactics are working is a challenge, especially as digital tactics are integrated into a more holistic tactical plan," Mr. Wearley says. "Digital marketing brings with it a number of variables that need to be controlled, which adds to the complexity of ROI interpretation."

"In many organizations today, the ROI model is still rooted in a traditional, linear field sales approach; today's market is much more fragmented, more dynamic," says Brent Rose, senior manager, digital marketing, for Daiichi Sankyo. "As a result, a company's ROI model needs to not only maintain the traditional model, but also have the flexibility to precisely measure new tactics as well as the collective impact of multiple tactics in the mix."

"The sophistication of ROI needs to support the sensitivity of the market environment we are now in," observes Todd Smith, executive VP and chief commercial officer, Horizon Pharma. "There is a need for appropriate measurements specific to these new communication and marketing vehicles because budget realities require better, more immediate lines of sight on performance, and the ability to assess near and long-term activity."

However, Peter Dannenfelser, director of marketing, Digital Center of Excellence, North America, Janssen Pharmaceutical Companies of Johnson & Johnson, suggests that rather than seeking a "new" ROI model, pharma companies should strive to understand the value of all its marketing investments.

"As a result of this new information age, we are engaging customers in many more places;

FAST FACT

AN ESTIMATED 173 MILLION U.S. ADULTS ARE USING THE INTERNET FOR HEALTH PURPOSES, WITH 116 MILLION ONLINE SPECIFICALLY FOR PRESCRIPTION DRUG OR PHARMACEUTICAL COMPANY RESOURCES.

Source: Manhattan Research

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MARTIN HUSAR *Sanofi Canada*

"Digital technology, demographics, and societal views are rapidly facilitating the shift of power and amplifying patient perceptions and expectations."

thus, the impact of a specific tactic is fragmented and harder to measure," Mr. Dannenfelser says. "With that in mind, the overall marketing budget should be judged on ROI driven by smaller, incremental direct return from individual tactics versus measuring the individual tactics themselves. What this means is that we may need to move to evaluating the larger ROI mix, which can be uncomfortable for traditional marketers."

"It was not that long ago that we could account for the vast majority of exposures, impressions, and interactions with a target audience of consumers or professionals," notes Mark Bard, co-founder, Digital Health Coalition. "When there is a limited range of options, we can analyze what is working and isolate the drivers that influence or motivate the desired action of behavior. But in a world of multiple screens, it is increasingly difficult to isolate what is working, and companies have migrated to a desire to understand the holistic integration of all channels."

Mr. Bard points out that the transaction in pharma is often one or two steps removed from the marketing.

"A consumer may see a TV ad, have brief exposure to a print ad, talk about the product with friends and family on Twitter or Facebook, and then have a conversation with his or her physician to decide what product is best for his or her unique situation and medical history," he explains. "The unique nature of the ROI cascade is what makes the pharmaceutical industry so interesting from the perspective of the brand team and its marketing partners; more channels means more interactions and more opportunities for success."

"As digital health matures, we're finding that channel opportunities vary greatly by audience."

According to Mr. Bard, while it may never be possible for pharma to isolate the specific ROI of a digital tactic such as social media, the industry is learning to monitor and track ROI across all channels to get a sharper picture of where each tool fits in the overall marketing strategy.

"In some cases these innovative programs may actually inform and drive traditional marketing through customer insights and the ability to gain these insights in a matter of weeks or hours, as opposed to waiting weeks or months for a campaign response," Mr. Bard says.

A Path to Patient Value

Martin Husar, digital marketing manager, Sanofi Canada, says he believes it's clear a new ROI model is necessary; the real challenge is connecting the dots to make it happen.

"We need to make sure that patient health and well-being improves and link that to savings in the healthcare system, as well as positive incentives for the company," Mr. Husar says. "As power shifts from the healthcare system to the patient, the dots will become more and more digital, and we at Sanofi are adapting by making sure we choose the right 'R' to invest in. There is an opportunity to convert patient knowledge and engagement into the optimization of healthcare resources consumption, which should provide economic benefit for the healthcare system and the industry."

MAUREEN MALLOY
Manhattan Research

Mr. Rose observes that the industry's value proposition is shifting from solutions to outcomes, focusing on patients as the most important element.

"Medication is an important part of treating disease, but it may not be the most challenging aspect of treatment," he says. "We take a look at the entire patient management process, consider our role, and determine how we can contribute to give a patient a better outcome."

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VIEWPOINTS

KEN RIBOTSKY
President and CEO
Brandkarma

A New Value Proposition

In the past, value propositions took the form of a single impression; the one thing that was meaningful to the largest number of people. Now pharma marketers are trending away from a one-size-fits-all approach. If you are promoting a drug or a medical device, the value proposition for a healthcare professional will be very different than the value proposition for patients, caregivers, or managed care organizations. Your value proposition should be tailored for the specific target audience you want to reach.

Relationships: One Patient at a Time

There are many social media opportunities to deliver targeted patient-centric communications, as well as informal communities. The key to delivering targeted patient-centric communications on social media is being able to segment an audience who is online, has a problem your brand can solve, or is already talking about your brand. First, we need to understand what their needs and concerns are, then deliver patient-centric solutions to meet their needs. It all comes down to building relationships on an individual level, across multiple social media platforms.

CAMILLE DESANTIS
Co-founder, Chief of Brand Strategy
Guard Dog Brand Development

Moving Beyond Dollars to Make Sense of ROI

We find it somewhat unfair that "the street" works on quarterly results when building brand equity — and loyalty — takes time. Measuring the ROI of a specific marketing tactic can be a valuable exercise; however, quarterly ROI measures of brand value often provide inaccurate diagnoses of brand health. There is a need for a new ROI model that incorporates target audience beliefs and behaviors, not just quarterly dollar figures.

Focus on Quality

For brands and their sponsor companies, a value proposition can be improved by focusing on the quality of the relationship between those brands and companies and the audiences they serve. We evaluate both brand performance and relationship quality measures. One metric directly influences the other. The goal is to understand how to ensure a high net promoter score for the brand whether it is a product brand or a sponsor company brand.

BRIAN THOMPSON
Senior VP
MCS Healthcare Public Relations

ROI Should Reflect Value

At a time when many companies have begun to emphasize building relationships and bringing value to customers over meeting sales quotas, ROI measurement tools should follow the same path. For example, when measuring the success of a PR program, ask yourself two questions. First, has the initiative strengthened your company's relationship with key influencers, such as patient organizations or physicians, who will be key to your brand's success? And second, has your campaign been of value — even in an unbranded way — to these same core audiences?

Being a Credible Voice

Social media is about being an active participant in a conversation. Sitting on the sidelines and listening will not give you credibility in the social media universe. The best way to start that conversation is for marketers to empower their social media expert to be a voice within the patient community providing credible, unbranded info about disease awareness and advocacy programs.

JEFF MEEHAN
Chief Commercial Officer
MD On-Line

Nonfinancial Benefits

These days, we need to go beyond dollars and cents and also consider the nonfinancial benefits when considering ROI. Factors such as customer satisfaction, fulfilling patient needs, and benefits to society as a whole can help provide a fairer and more accurate way of interpreting ROI, particularly as we move toward a more patient-centric model. By fulfilling the needs of the customer, marketers can expect a greater ROI.

Customer-Centricity

Instead of trying to convince an audience why a particular product/molecule solves a problem better than the competition, brands and companies can improve their value proposition by uncovering and meeting the needs of patients — and solving that problem. By being more customer-centric and answering their needs, marketers can appeal to the customer's strongest drivers/motivation, instead of trying to convince them that they are.

NICK HALKITIS
VP, eMarketing and Digital Strategies
MediciGlobal

Cost Variables

Digital marketing allows for greater specificity in reaching ePharma consumers than traditional advertising methods, and this is crucial when reaching niche patient populations required for clinical trials. Today's ROI model for ePatient recruitment assesses the cost on a per-patient basis. ROI assesses patient acquisition costs based on number of patients responding to advertising, cost of patients that meet study criteria, and cost per-patient randomized. Costs must also weigh against the speed of patient acquisition. For example, a higher patient acquisition cost may be appropriate if patients are recruited faster. ROI must assess cost, time, and quality of patient referral.

The Power of Social Media

Social media is a powerful tool for patient-centric communications. It offers the ability to select and segment the right population as patients self-identify with other patients in targeted communities. Unencumbered by advertising space or air time of non-Internet advertising, social media allows patients to learn more about their medical condition in dynamic communities

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of "consequential strangers." Importantly, digital strategies for patient engagement that use the Web and social media can be between three to five times less costly in some countries, than traditional recruitment methods.

JOHN NOSTA
Executive VP, Strategy
Ogilvy CommonHealth Specialty Marketing, part of Ogilvy CommonHealth Worldwide

New Media, New ROI

Today's ROI model is a remnant from yesterday's dollars and cents world. One of today's hottest marketing books is about just that — ROI. But in this case, it's "Return on Influence," by Mark Schaefer. The marketplace of tomorrow will be comprised of the social and professional networks that new media has brought to life. And influence will play a significant role in the diffusion of innovation and subsequent brand marketing.

Individual Empowerment

Social media is the cauldron in which big data now lives. The essential observation for social media is that one-way, billboard-style posts and tweets fail to achieve the promise of this media. While pop superstars flourish on TV and other one-way mass-market outlets, social media is much more about the reciprocal engagement that empowers the everyday individual — from doctor to mom — helping to provide resonant voices in the marketplace.

RYAN HOPPER
Director, Healthcare
SSI

Residual Impact

Today's ROI models are increasingly transactional in an environment where there are so many other factors to consider. The success or failure of a campaign can no longer be measured on the immediate return. In an era of social media, 24-hour news channels and an ever-shrinking world, the residual impact of any marketing effort must be measured. This lingering presence and how it is perceived is often more powerful than the original campaign.

An Information-Rich Approach

Companies need to focus not just on increasing share but on providing information about the disease and working with the online community to inform them of options that are available. Companies that take a consumer-centric and information-rich approach to their social media advertising will be rewarded with more loyal customers and a more positive image in the social media universe.

AL TOPIN
President
Topin & Associates

Practicing Better Medicine

Today's brands need to create value by demonstrating how they can help an HCP practice better medicine by providing the education that builds a richer understanding of the drug and the patient; supporting patients' needs for more information about their conditions and treatments; and facilitating the issues of access, REMS, and adherence. Brands that do this can turn a basic value proposition into an insightful value program, which allows the brand to help solve problems within the HP's practice and help ease the patient's journey.

ABBY MANSFIELD
Senior VP, Creative Director
Topin & Associates

Gauging Social Adoption

Once we figure out how pharma brands can use social channels and remain FDA-compliant, we'll see just how social patients really want to be. In the meantime, social channels still make sense for unbranded communications and communities, but the big question remains how much impact these programs actually have on scripts written or sales made. As far as new platforms, gaming could be a way to engage patients, which makes sense from a compliance standpoint, and it's another way to build patient communities.

Mr. Smith says the key takeaway from a recent panel he attended on value proposition and innovation was that the value proposition story must be embedded as early in the development process as possible.

"There is an opportunity that companies must take to demonstrate their commitment to disease state, patients, understanding of economics, and complexities of delivering healthcare," he explains. "This means better alignment with the needs and expectations of key stakeholders — MDs, patients, payers — across the treatment continuum, while demonstrating added/real benefit with the product being brought to market."

Mr. Dannenfelser says pharma companies need to realize that marketing tactics are rapidly becoming part of the patient's perception of the product itself, with some tools seen as adding further value to the brand.

"As soon as we begin to supply interactive support tools such as adherence reminders and product education to HCPs and patients, we are inserting ourselves into the continuum of care and moving beyond traditional sales and marketing," he says. "This means we need to look at marketing materials as much more than tools to improve the likelihood that our product will be considered — our customers perceive them as part of the actual product benefits."

Socially Speaking

Mr. Bard says social media has become the new online paradigm.

"In the early stages of social media, pharma companies believed it would be a great way to introduce interruption marketing in a new channel; however, the very nature of social is that it's a conversation, not a one-way mass media campaign," he says. "We have an emerging segment of consumers online with a desire to have a conversation and engage with pharma, and on the other side we have marketers with a desire to push messaging and turn off the comments or the ability to interact. This is not social media — it's advertising within a social media platform."

One consistent challenge in incorporating social media within the pharma marketing plan is obtaining a comprehensive view of which stakeholders are connected and have influence across their social networks. Boston Consulting Group analysts say social-networking analysis can help companies visualize stakeholder networks and define the most effective ways to engage with key players.

Mr. Wearley says that Daiichi Sankyo's ap-

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MONIQUE LEVY
Manhattan Research

"Physician digital behavior varies in unpredictable ways, making segmentation critical, especially with most brands having to do more with less in 2013."

SUZANNE NIEDRICH
Lundbeck

"Companies must take care to establish an authentic relationship with the community they're trying to reach before engaging in social media."

proach is to evaluate social media channels within the context of the company's broader strategy.

"There has to be valid reason for engaging; to be successful, a company's shouldn't just jump on the social media bandwagon," he says.

Mr. Dannenfelser stresses that customers in the new media space want to be spoken with, rather than talked at, and that the days of basing entire marketing plans on the one-way bombardment of two or three succinct messages are over. He believes the best use of social media is as a support tool, rather than a new marketing channel.

"I try to follow this rule of thumb when it comes to social media in healthcare: only speak when spoken to, or when you can add real value," he says. "Social media is a terrific platform to provide accurate information to improve patient outcomes at the point where the discussions are happening."

Suzanne Niedrich, associate director, neurology eMarketing, at Lundbeck, believes social media platforms such as Facebook and Twitter can be great tools for building communities of patients and caregivers and engaging them in targeted conversations. She cites as an example Moving Together for HD, the unbranded, Lundbeck-sponsored Facebook page for the Huntington's disease community.

Ms. Niedrich cautions that companies must take care to establish an authentic relationship with the community they are trying to reach before engaging in social media.

"At Lundbeck, we've worked hard to demonstrate our commitment on mutual goals by actively participating in these communities through advocacy, disease awareness, and fundraising events," she says. "We take pride in our focus on the patient and keep the patients' needs in mind at all times."

According to Mr. Rose, the role pharma plays in social media is largely defined by the patients themselves, since they have true ownership of the conversations and the interaction.

An Online Pulse

Online Patient-Physician Communication

34% of U.S. physicians communicate online with patients via email, secure, messaging system, instant messaging, or online video conferencing.

Hours Spent Online Professionally Per Week, Top Three Specialties

Specialty	Average hours per week
Hematology oncologists	17
Endocrinologists	15
OB/GYNs	13

Percentage of Physicians Visiting Pharma or Biotech Product Websites Weekly or More Often, Top 3 Specialties:

Specialty	Percentage of respondents
Hematology oncologists	34%
Medical oncologists	27%
Psychiatrists	23%
Average across all specialties	15%

Source: Manhattan Research, Taking the Pulse U.S. 2012.
For more information, visit manhattanresearch.com.

Snapshot from Canada

Canadian patients, much like their U.S. neighbors, are now, more than ever, taking control of their health while expanding their connections to healthcare professionals, health institutions, solution providers, government, and payers. At the same time, according to Martin Husar, digital marketing manager, Sanofi Canada, digital technology, demographics, and societal views are rapidly facilitating the shift of power and amplifying patient perceptions and expectations.

Mr. Husar notes that Sanofi is looking at ways to include anonymous patient data points into the ROI equation through innovative solutions to improve their health and not only through medications, but through devices and services, representing a holistic view of patient care.

For example, in March 2012 Sanofi Canada launched the STARsystem platform, a step-by-step personalized diabetes management system that empowers people living with diabetes to take control of their blood glucose. The platform includes a website with resources and a personalized action plan, as well as one-on-one health coaching sessions.

"With STARsystem, we are looking at the ratio of active to inactive patients, and what we can do about it," Mr. Husar says. "We are analyzing how far patients have embarked on their self-management paths and how we can better facilitate their efforts, and much more is planned."

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MARK BARD
Digital Health Coalition

"In a world of multiple screens, it is increasingly difficult to isolate what is working, and companies have migrated to a desire to understand the holistic integration of all channels."

"As a result of this new information age, we are engaging customers in many more places; thus, the impact of a specific tactic is fragmented and harder to measure."

PETER DANNENFELSER
Janssen Pharmaceuticals

"If the industry and the FDA together cannot find a way to contribute on the patient's terms in a meaningful way, the positive contributions we can make to these discussions, which are happening with or without us, are greatly reduced," he observes.

Mr. Bard believes once the industry has clarity and direction from the FDA with regard to control and responsibility online, a handful of companies will leap forward with regard to innovation in the social space.

"There are a number of companies experimenting online today and they have a pretty solid idea of what they want to do with new media as the regulatory environment becomes more clear," he adds.

Mr. Dannenfelser says he thinks the industry should actually stop waiting for guidance in the social media space.

"We have the rules; it's up to us as smart marketers to work within them," he says.

Another new media component that Mr. Bard feels pharma needs to pay closer attention to is mobile as a platform.

"It's not about mobile phones; it's about mobile access to information, decision support at the point of care, and consumers accessing the latest information with their physician or at the pharmacy counter when they are debating a prescription," he says. "The ability to migrate thinking and strategy from the desktop experience to the mobile experience is critical to success over the next five years. When sitting down for brand planning, executives need to be thinking about how customers will access content via mobile today and in two years' time, and what existing processes — coupons, compliance, customer service — will be revolutionized by mobile."

Mr. Dannenfelser agrees that pharma as an industry needs to actively embrace mobile.

"The proliferation of a device that provides information when and where our customers are

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seeking it is where the new battleground for share of voice will take place," he notes.

"Moving forward, I see increased opportunity for reaching patients through mobile devices for immediacy, loyalty/engagement, and geo-targeting," Mr. Smith says. PV

EXPERTS

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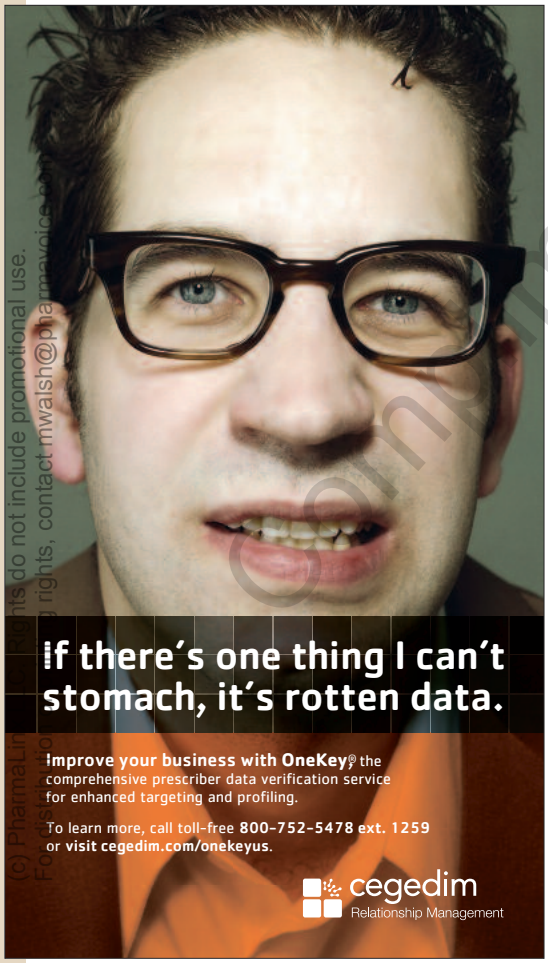

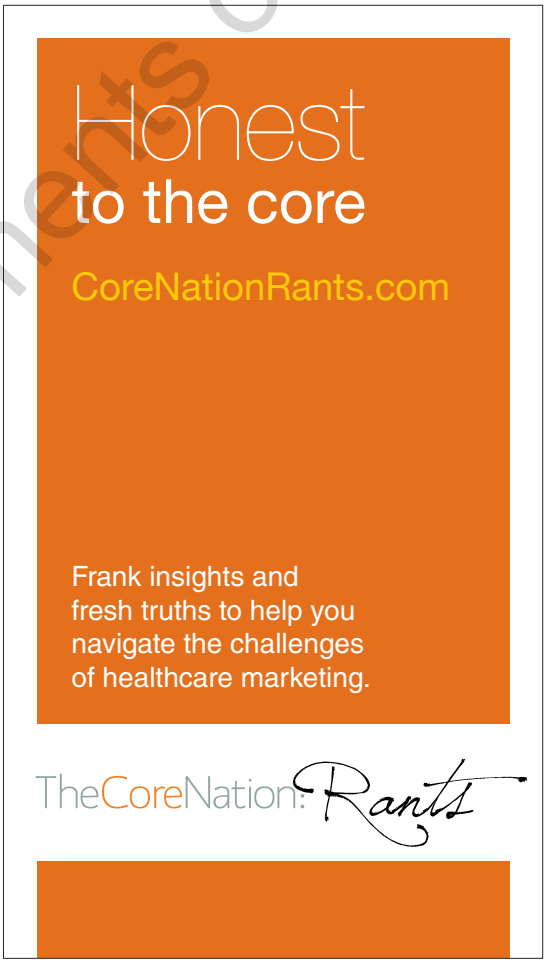

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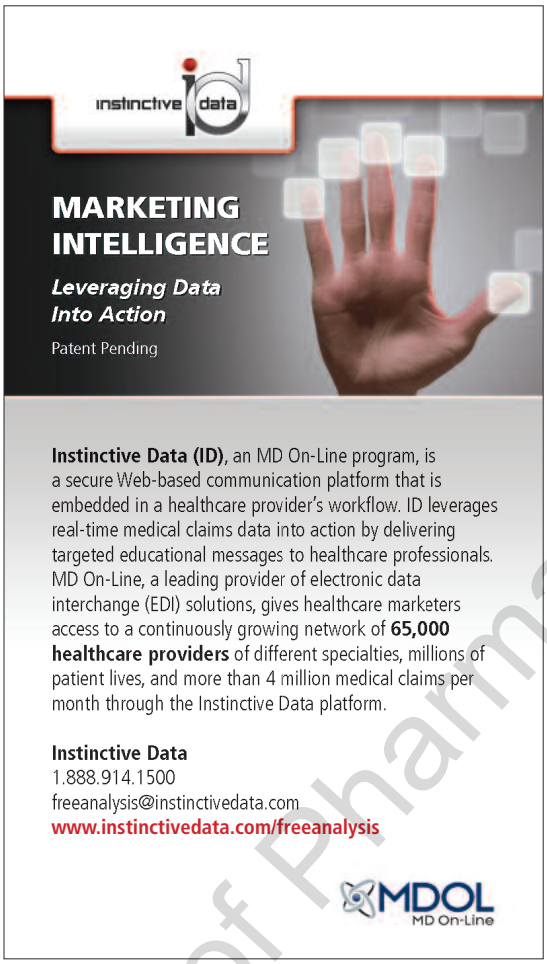

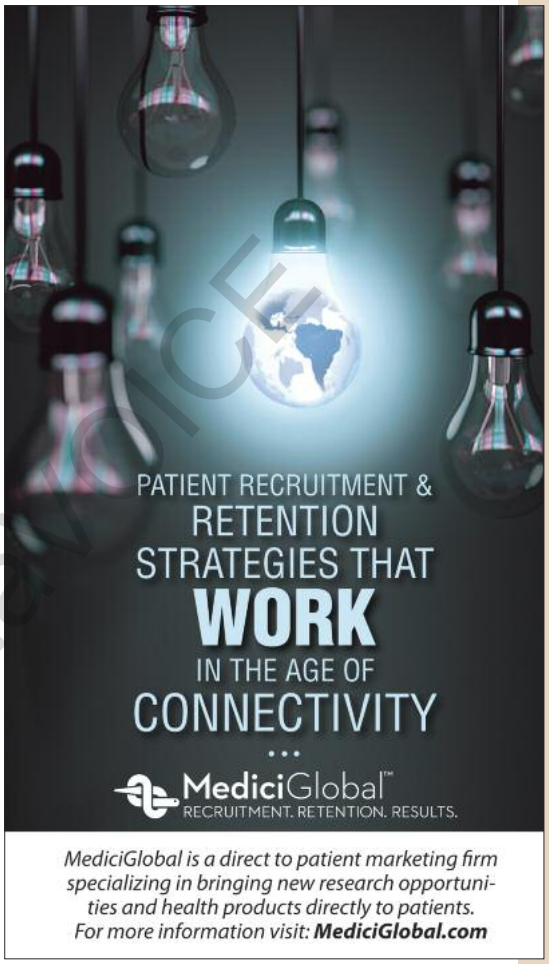

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