

# HEALTHCARE AND SOCIAL MEDIA: A Winning Formula

**D**o you know what physicians are saying to each other about your company and its products? Could you identify the top three fears of patients suffering from a chronic condition treated by your market leading therapy? Social media sites can get pharmacos closer to answering each of these questions. Social media continues to attract users — recent survey findings from Pew Research indicate that 65% of adult Internet users engage in social media, with user growth among older adults (age 50-64) almost doubling, from 25% to 47%, between April 2009 and May 2010. This trend is mirrored in the population of health professionals as well. Quantia MD found that 67% of physicians polled use social media in some form for work.

And it's proving to be an effective clinical tool. For example, ImproveCareNow, a network of pediatric gastroenterologists facilitates collaboration to improve health outcomes of children and adolescents with ulcerative colitis and Crohn's disease. By sharing data and ideas and helping translate these into practice, clinicians improved remission rates from 49% to 67% (according to Pew survey, Mind the Gap: Peer-to-peer Healthcare, Aug. 2, 2011).

However, when it comes to using social media to roundtable healthcare issues, patients are in the vanguard. One in four internet users living with high blood pressure, cancer, or some other chronic ailment (23%) has gone online to find others with similar health concerns. It is no surprise that professional societies, provider systems and many hospitals (including the Mayo Clinic) are developing their social media capabilities to engage with these patients.

But how can pharmacos make the most of using social media for healthcare? First, let's clarify why these various stakeholders use social media, and then discuss how pharmacos can use their increasing engagement to better serve the broader healthcare community.

## Why the Healthcare Community Uses Social Media

Even though patients, physicians, friends, family members and researchers are all involved with healthcare decisions, they use social media for different, albeit related, purposes.

**PATIENTS SEEK SUPPORT, COMMUNITY, AND SECOND OPINIONS.** Patients' primary goal is to find and give support in dealing with the ups and downs of a health condition. Patients vis-



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iting often record and share their daily progress, with the social media platform becoming a therapeutic journal of sorts that elicits advice and emotional support from others.

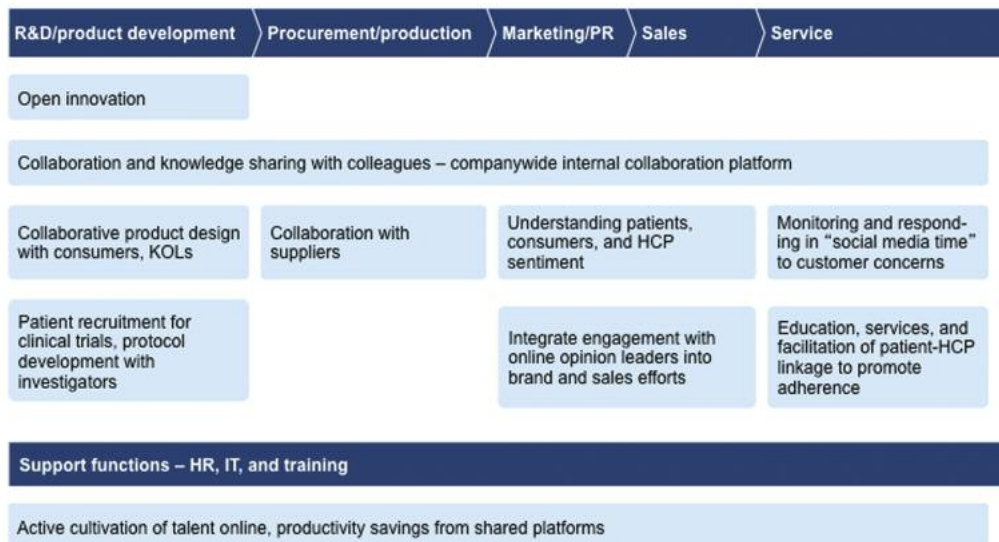
This ability to engender an emotional connection is also a main reason for the "stickiness" of social media — the degree of retained engagement. This might explain why patients with diseases of lower prevalence often have higher degrees of engagement within online communities — these outlets provide an easy path to others with similar conditions.

A testament to the increasing influence of these platforms is that patients often turn to social media for second opinions on managing their condition and treatment. In a recent study done by NM Incite on metastatic melanoma, for example, a third of the posts on patient sites related to second opinions on both treatments and overall management of their condition.

All these patient activities influence the patient decision journey and the delivery of health services and products, making it a channel that pharmacos need to understand.

**PHYSICIANS SEEK INFORMED INSIGHT.** For physicians, online social networks serve a more well-defined purpose. Rather than emotional support, they provide a channel to share experiences in a closed peer-to-peer network. Topics range from clinical gray-area cases to practice management issues such as coding, hiring, and medical malpractice. Most physicians' peer networks are limited to the hospitals or offices in which they practice — essentially a handful of colleagues. In contrast, online social networks multiply the peer network many times over.

### Pharmas can create value from social media across all business activities





This expanded network can introduce physicians to clinical practice variations by geography and by institution, and provide unique clinical insight not available otherwise.

Physicians engage in social media for fewer reasons than patients do, but the ability of these networks to expand physicians' clinical and practice understanding beyond their immediate practice environment creates strong hooks for physician engagement.

## Capturing Value from Social Media Networks

With the growing use of social media by both patients and physicians, it looks like one of the few dynamic, cost-effective ways to initiate and maintain connection with a large number of key stakeholders (see Figure 1). However, the lack of FDA guidance on social media (postponed in 2011) continues to create ambiguity and risks of noncompliance, impeding pharma companies' full-range use of social media.

Nonetheless, early but limited forays such as Johnson & Johnson's Psoriasis 360, CML Earth by Novartis, and Discuss Diabetes by Sanofi show that the channel is effective for delivering valuable patient information. Additional social media-based efforts focus on increasing clinical trial recruitment for rare conditions and soliciting ideas to solve internal R&D problems (e.g., the InnoCentive project).

With regulatory uncertainty a barrier to direct online dialogue with customers, we believe that social media listening — monitoring and measuring customer online conversations — is the most feasible and valuable path for pharmacos to leverage social media. This approach can help companies generate real-time customer insights from a motivated, highly segmented audience, and do so on a broad scale.

In our experience, however, most pharmacos have not yet been able to capitalize on social media listening because the insights are not understood or applied. Structure and consistency are important in listening initiatives, and McKinsey's approach to generating useful social media insights is designed to capture data and answers in response to four key questions:

- Who is engaging in conversation on a brand or therapeutic area?
- Where are they engaging?
- What management and treatment strategies have they found helpful?
- What are their unmet needs?

Armed with answers to these questions, companies can refine brand strategy and patient collateral, and even revise communications with physicians.

There are already many examples of how listening has influenced brand strategies and tactics. Some relate to better understanding of what patients and caregivers are saying about

the latest campaign, while others glean insights from the language patients use when talking about their condition to help craft messages (e.g. rheumatoid arthritis patients calling themselves "rheumies"). Similarly, a clear pattern of frustration or confusion in patients' conversations can identify unmet needs, such as side effect management strategies, which can enable pharmacos to help physicians manage patients better.

The two case examples that follow give us a peek into how companies have used insights from social media — insights that benefit the patient, physicians, and the company.

**CASE 1:** In preparation for the launch of its new anaphylaxis treatment, a top pharma sought social media insights to understand allergy treatments and management techniques among both patients and caregivers to shape its brand strategy. Among the valuable insights gathered:

- 25% of conversations on anaphylaxis are on parenting sites with mothers discussing child allergies. This resulted in the company launching a nuanced marketing campaign to target mothers, a hitherto untapped segment.
- Patients prefer existing auto-inject treatment, but dislike the pain associated with drug administration. The company therefore positioned its product as being a "pain-free" solution to compete with the market leaders.

**CASE 2:** A top pharmaceutical company wanted to differentiate its branded Rx product in a new category — anti-aging — and used social media to quickly understand consumer perceptions of brand, category, and marketing messages. This resulted in reshaping of brand positioning because the company found:

- Consumers rarely use the term 'medical anti-aging'. Instead they mention brands in the context of objectives e.g. firming, tightening. This resulted in the company refining its marketing lexicon to better reflect patient conversation.
- That the brand was being discussed primarily on plastic surgery sites (two-thirds of conversations) and under-represented on other anti-aging sites, compared with its peer set. This resulted in a concerted campaign to capture conversation on female beauty and weight-loss sites.

Social media listening is not easy, but can be effective. In our experience productive social media listening requires four key organizational characteristics:

- » First, an internal regulatory framework to help guide all social media activities by brand teams. This is easier said than done, given the lack of external regulatory guidance, but once in place, companies can more easily define which listening activities to undertake and which to avoid.

- » Second, literacy in social media. This requires brand teams and others to be familiar with the lexicon of social media and related analytics (e.g., engagement metrics) so that sharing and evolution of ideas for social media initiatives and traditional branding and marketing can be efficient.

- » Third, discreet capabilities and resources allocated to interpret, understand, and apply the information garnered from social media listening. Social media research is not an add-on to a brand manager's already-full slate; rather, it should be positioned as a mainstream form of gathering real insight on consumers. This perpetuates an environment where brand team can experiment with new analytics and develop consistent social media strategies linked to brand needs.

- » Finally, integration of social media insights into the brand planning process, specifically linking to both brand strategy and tactics. Social media listening can provide guidance on online spend, search engine optimization as well as deployment of multichannel tactics (e.g., patient education materials, e-sampling, and e-details).

The increasing comfort with and use of social media by providers and patients presents pharmacos with a golden opportunity to gain direct feedback, learn more about their target customers, and uncover concerns before they undermine a product or brand. Understanding how the channel informs and shapes patient and physician thinking and decision-making is a critical first step. However, the real value of social media will be realized when pharmacos go beyond that to develop social media listening capabilities that generate insights, and then translate those insights into brand campaigns and strategies that resonate more deeply with patients and providers. PV

*Editor's Notes: For more details on how to generate social media insights as a critical input into your brand strategies, please contact the authors of this paper: David Quigley (David\_Auigley@mckinsey.com); Chinmay Bhatt (Chinmay\_Bhatt@mckinsey.com); Archana Jagannathan (Archana\_Jagannathan@mckinsey.com); John Whang (John\_Whang@mckinsey.com); and Melissa Davies (Melissa.Davies@NMIincite.com).*

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