By Carolyn Gretton

Study Explores

How Consumers Interact With Pharma Companies

TREND: Growing numbers of patients are turning to social media and digital tools to obtain drug information before meeting with their physicians, representing a key opportunity for many brands.


Maureen Malloy

Manhattan Research's most recent ePharma Consumer study, fielded in the fourth quarter of 2011, found that 42% of online adults agree that pharmaceutical companies should be involved in online health communities for consumers and 19% of online adults disagree that pharma should participate in this type of forum.

Interest in pharma involvement is significantly higher among certain audiences, representing stronger opportunities for some pharmaceutical brands than others. According to the study, ADD/ADHD and bipolar disorder caregivers are the top groups feeling pharma ought to be active in communities.

"The expectation for pharma to be active in health communities is quite high, particularly among certain disease states and the caregiver population," says Maureen Malloy, senior healthcare analyst at Manhattan Research. "This emphasizes why it's so important that the FDA builds on the guidance they recently issued for off-label discussions. Patients are calling, and many brands are trying to determine how to respond."

An earlier study conducted by Manhattan Research showed that consumer use of social media for health is on the rise, growing from 63 million U.S. adults accessing health-related, user-generated content in 2008 to 107 million in 2011.

According to ePharma Consumer, more than half (51%) of online U.S. adults use pharma-sponsored digital resources, such as condition and treatment information, disease management tools, doctor discussion guides, or mobile apps or websites. These resources are strong drivers of action, with 43% of consumers using pharma-sponsored digital resources having discussed prescription drugs with a doctor, nurse, or pharmacist as a result, the study found.

For more information, visit manhattanresearch.com.

PATIENT GROUPS SAY PHARMA COMPANIES SHOULD BE INVOLVED IN THESE ONLINE COMMUNITIES

1. ADD/ADHD caregivers
2. Bipolar disorder caregivers
3. Epilepsy caregivers
4. Cystic fibrosis patients
5. Rheumatoid arthritis patients

Source: Manhattan Research, ePharma Consumer study. For more information, visit manhattanresearch.com.

Companies Turn to Innovation
GROUPS FOR REACHING KEY CUSTOMERS

The escalating pace of external communications and workplace responsibilities have made it challenging for the biopharma industry to reach its core customer groups with marketing messages.

The Best Practices report, Best Practices in Advancing Customer Marketing: Innovations in Engaging and Communicating with Health Care Providers, Patients, Payers and KOLs, notes that many companies have formed specific innovation units to overcome challenges in reaching pharma customers. Within a number of benchmark companies, these units tend to be identified for their expertise and ability to execute on activities and tactics that are required, the study found.

According to the report, more than three-quarters of innovation units report to either the marketing or commercial operations division of the company. Many innovation units seem to focus their work on healthcare professionals and consumers, leaving great opportunities to work with other customer segments, such as advocacy and payer organizations.

For more information, visit best-in-class.com.

CROs Evolving Into Innovation
PARTNERS FOR BIOPHARMA COMPANIES


James Ogle

The recent shift in the CRO-biopharma company relationship from project-specific outsourcing to strategic alliances has created an environment in which biopharmas consider CROs as innovation partners.

According to an INC Research paper, The Innovation Imperative: How CROs Are Driving The Transformation of Clinical Research, these multi-year alliances are based on higher levels of engagement with the CRO and leverage years of perspective, expertise, and tactical approaches.

"The drug development industry is experiencing a new wave of R&D innovation, primarily as a response to financial pressures," says INC Research CEO James Ogle. "As a result, modern alliance partnership models will help bring better and safer drugs to market more efficiently."

For more information, visit increasearch.com.

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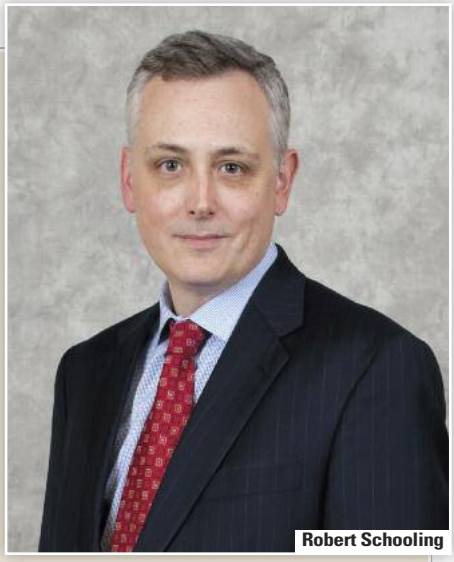
Reputation Key to

Stronger Pharma Business Outcome

TREND: Aligning company values with societal expectations impacts how patients and physicians behave, underpins support for key policy issues that matter to the industry, and ultimately shapes shareholder value.



Robert Schooling

Bryan Dumont

Companies in the pharmaceutical industry have been beset by a wide range of challenges that affect public confidence and the ability to remain competitive in the marketplace. From concerns about product safety and quality to evolving expectations about addressing chronic disease, cost of healthcare, and the nature of innovation, stakeholders are demanding more than ever from pharmaceutical companies to remain trusted and leading corporate citizens.

Recent findings from an APCO Worldwide study using its Return on Reputation research model reveal that with a one-point increase in the pharmaceutical industry's reputation, an additional 28,000 patients ask their doctors about a company's medicine; sales for the average pharmaceutical company increase by 3.3%; and market capitalization increases 0.2% for the average company.

"Companies in the pharmaceutical industry have been beset by a wide range of unique challenges that affect public confidence and the ability to remain competitive in the marketplace," says Robert Schooling, global head of APCO's healthcare practice. "From concerns about product safety and quality to evolving expectations for addressing chronic disease, cost of healthcare and the future of innovation, stakeholders expect, now more than ever, that pharmaceutical companies remain trusted and leading corporate citizens."

APCO also uncovered core drivers that have the greatest impact in shaping and improving a pharmaceutical company's reputation. One key opportunity is in demonstrating leadership in addressing the growing problem of chronic disease. Policymakers, healthcare providers, and patients all expect the industry to play a more prominent role in helping the country better manage chronic disease and to partner with the public health community in promoting disease prevention.

"The results of this study clearly indicate that the reputation of pharmaceutical companies has a measurable impact in improving the business environment, including increasing sales and market capitalization," adds Bryan Dumont, president of APCO Insight. "These findings provide a distinct road map for how the industry effectively enhances its most valuable asset."

For more information, visit apcoworldwide.com.

Digital Identities Likely to
DRIVE 2012 LIFE-SCIENCES IT TRENDS

Mollie Shields-Uehling

Expanded use of standards-based interoperable digital identities is one of several trends expected to drive IT trends within the life sciences in the coming year.

According to recent analysis by SAFE-BioPharma Association, industry leaders are rapidly increasing use of digital identities among employees, collaborators, and clinical investigators. Issued once every three years, they take the place of multiple online identities and can be used to control access to information and physical facilities. They also provide the ability to apply legally binding digital signatures to electronic documents. The benefit of interoperability is that the digital identity is recognized and accepted by U.S. government agencies, as well as by other companies.

Significant time and cost savings are realized when trial-related documents are accessed from the cloud rather than delivered by courier or mail. Interoperable digital identities give researchers access to cloud-based electronic documents as well as the capability to apply legally binding digital signatures.

"Trial master files, the central record containing the files associated with clinical trials, are one of the last areas where clinical development records are primarily paper-based," says Mollie Shields-Uehling, president and CEO, SAFE-BioPharma Association.

Multiple pilot studies scheduled to start in the next few months indicate that pharmaceutical companies are preparing to make the process electronic.

Companies will use SAFE-BioPharma digital identities to manage access to documents and to provide participants with the ability to apply legally binding digital signatures.

For more information, visit safe-biopharma.org.

Other market insights…

Firms Shifting Medical Education FOCUS INTO EMERGING MARKETS

In the current environment, medical education groups are faced with the challenge of holding down costs while adding new programs and expanding into emerging markets. As a result, pharmaceutical and medical device leaders are beginning to leverage their resources in these emerging areas, such as China and India, in order to help fuel overall growth.

According to the Best Practices study, Professional Medical Education Excellence: Structures, Resources, Services & Performance Levels to Optimize Medical Device Education Groups, medical device companies only allocate 7.5% of their medical education full-time equivalents (FTEs) and 6.4% of their medical education budget to the Asia emerging areas. Similarly, pharmaceutical companies offer even greater potential for growth into emerging markets, as they currently dedicate only 1.9% of their medical education FTEs and budget to these geographic areas.

For more information, visit best-in-class.com.

CTMS Market Poised for DOUBLE-DIGIT GROWTH

Because clinical trials involve huge capital investment and may affect the subjects involved, proper management of clinical trials has become a priority for hospitals.

According to the MarketsandMarkets report, Clinical Trial Management Systems (CTMS) Market: Global Trends, Opportunities, Challenge and Forecasts (2011 - 2016), the global CTMS market is estimated to grow at a compound annual growth rate (CAGR) of 14.5% during the 2011-2016 period. The report shows that North America is leading the global CTMS market, holding an estimated 62% share in 2010..

For more information, visit marketsandmarkets.com.

European Companies Moving TOWARD OPERATIONAL COMPLIANCE

According to pharma, biotech, and medical device executives surveyed for the second annual Cegedim Relationship Management report, 2011 European Trends in Aggregate Spend, Transparency and Disclosure, organizations are committed to achieving operational compliance but find incomplete data and internal system inefficiencies to be their greatest challenges.

Comparisons between 2010 and 2011 results show that more European companies are enforcing corporate standards for spending on HCPs, with 76% of 2011 respondents saying their policies apply to all external partners and internal data, up from 62% in 2010.

Further, compliance professionals are more confident in their companies' ability to meet transparency requirements, with 87% of 2011 participants saying their ability to comply is "good" or "excellent," an increase from 73% in 2010.

About 64% of those polled in 2011 indicated that implementing a unique spend data reporting and disclosure solution is "absolutely a requirement." But 44% of the 2011 respondents reported that their companies are currently satisfying existing reporting and disclosure requirements with spreadsheets and other manual process, a 22% jump from 2010.

For more information, visit cegedim.com/rm.

Personalized Medicine to Spur GROWTH IN COMPANION DIAGNOSTICS

The companion diagnostics market is expected to explode as the personalized medicine market catapults to $42 billion by 2015, according to the TriMarkPublications.com report, Companion Diagnostics in Personalized Medicine and Cancer. Companion diagnostics can be deployed clinically to stratify patients based on their response to certain therapeutic agents.

Companion diagnostics refers to a particular clinical diagnostic test that is under evaluation and is specifically linked to a known drug therapy. This linkage could be important in the therapeutic application and clinical outcome of a drug, such as with personalized medicine for oncology patients.

For more information, visit trimarkpublications.com.

Use of Nanotechnology in MEDICINE PROJECTED TO INCREASE

According to the BCC Research report, Nanotechnology in Medical Applications: The Global Market, the global nanomedicine market reached $63.8 billion in 2010 and $72.8 billion in 2011. The market is expected to grow to $130.9 billion by 2016 at a CAGR of 12.5% between 2011 and 2016.

For more information, visit bccresearch.com.

U.S. DRUG DELIVERY PRODUCT DEMAND

$ millions				% Annual Growth	
Item	2005	2010	2015	2005-2010	2010-2015
Oral	33,420	42,200	52,200	4.8	4.3
Parenteral	18,320	32,600	54,700	12.2	10.9
Other	14,160	19,000	27,100	6.1	7.4
Total	65,900	93,800	134,000	7.3	7.4

Source: The Freedonia Group Inc., Drug Delivery Products.
For more information, freedoniagroup.com.

Drug Delivery Product DEMAND REMAINS STRONG

According to the Freedonia Group study, Drug Delivery Products, U.S. demand for drug delivery products is projected to expand by 7.4% annually to $134 billion in 2015. The best growth opportunities are expected to emerge in dosage formulations that advance the nature of therapy for autoimmune conditions, cancer, heart disease, neurological disorders, and other debilitating health problems. Based on the complex nature of therapy and the high frequency of dosing requirements, central nervous system and hormonal and related conditions will be the fastest-growing indications served by drug delivery products.

For more information, visit freedoniagroup.com.

Stem Cell Market Could EXCEED $1 BILLION IN 2012

The market for stem cell technologies is forecast to rise to more than $700 million this year, and given some positive trends could exceed $1 billion according to research from Kalorama Information. The firm's report, Stem Cells: Worldwide Markets for Transplantation, Cord Blood Banking and Drug Development, cites newly permitted U.S. usage and accompanying research funding as factors in the market's growth.

For more information, visit kaloramainformation.com. PV