

Mixed Media: The **BEST** Ways to Reach Physicians in **2010**

Studies show that physician use of online and mobile technologies has reached a tipping point, but the sales rep is still first in the physician's heart.

According to several surveys regarding physician behavior, this could be the year of record-breaking physician adoption of online and digital resources.

"Until recently, the conversation around physician online marketing centered around proving the viability of the online channel, but the focus of online physician marketing has shifted considerably in 2010," says James Avallone, senior digital analyst at Manhattan Research. "Now, the viability of the online channel is a given, and marketers are concerned about developing a deeper understanding of physician Internet-related behavior."

Recent trends confirm that the best way to reach physicians in the long run is through an integrated and collaborative approach using the Internet, mobile devices, and social media.

"Alternate engagement platforms replete with engaging content and an analytics engine allow dynamic personalization, making these tactics intelligent and flexible," says Gaurav Kapoor, head, strategic marketing solutions, Indegene. "Today's technology allows implementation of dynamic analytics, segmentation, and personalization to create a value-added, educative, and satisfying experience for the physician."

While pharma marketers have done a commendable job in opening up to newer media, they need to continue and to push this space to be better, or at least mimic, than the present conventional salesforce, he adds.

Mr. Kapoor reports he has witnessed a dramatic rise in the adoption rate of alternate engagement platforms in the last 24 months.

"In some of our recent programs we have seen a recruitment rate as high as 68% for physicians into programs and a 300% to 400% increase in total annual time being spent by physicians online," Mr. Kapoor says. "This is a great testimony for the change to which the pharmaceutical industry is on the threshold."

Marketing efforts should follow the trend of physicians moving online, but that isn't happening yet, according to R. J. Lewis, president and CEO of e-Healthcare Solutions.

"Online is radically being underutilized by pharma companies today," he says. "The spend isn't following the increased physician usage, which is surging, but the dollars are only trickling toward change."

Mr. Lewis predicts that when, and if, FDA guidance around the Internet and social media comes out at the end of this year, 2011 will be a banner year for advertising to physicians online.

Cherie Hicks, CMR Institute



"As an industry rooted in technology, we would be remiss not to explore new communications tools and delivery methods."

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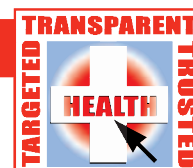
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"The viability of online tactics is a given today; marketers now need to focus on developing relationships in the channel."

"The best way to reach physicians is through an integrated approach using Web, mobile, and social media."



The lack of guidance is just one roadblock the industry throws up in its hesitancy to spend advertising dollars on online efforts. eHealthcare Solutions has conducted its own survey to determine other barriers.

In past versions of the company's client survey, respondents identified a number of barriers to online advertising spend. The reasons include lack of FDA regulations, low reach or low Web use of target, lack of corporate commitment, internal regulatory hurdles, and uncertain or immeasurable ROI.

"This year's survey showed that all five barriers, which were major hurdles in years past, are much less significant now," Mr. Lewis says. "The biggest barriers today are internal regulatory hurdles and the conservative nature of the industry."

Social media is another area of key growth in 2010, according to a recent Manhattan Research report.

"Two-thirds of physicians consume user-generated content for professional purposes, representing a noticeable increase from what was reported even a year ago," Mr. Avallone says.

Research shows that physicians are also more likely to access user-generated professional content in an open forum, such as a blog or a message board, as opposed to a protected or closed physician-only community, he adds.

Manhattan Research's physician findings show that doctors are much more advanced than the average consumer when it comes to mobile, online video, and social media activities overall, not just for work-related purposes.

Pharma marketers should keep this fact in mind when approaching physician-focused online content and services, Mr. Avallone says.

Sanjeev Gupta, general manager of healthcare solutions at Avaya agrees.

"Younger doctors entering the healthcare system are very tech savvy and they have the same level of expectation of technology in their

professional life as they have in their personal life, such as access to information on iPhone systems, mobile voice, or social media," he says. "They want their information available quickly and in context. Physicians and patients will start to personalize information in the form they like, and these demographic changes will lead to changes in online information expectations and more adoption."

More adoption does not mean easier access, however. While the increased physician adoption of the Internet and digital media provides more opportunities for reaching them, the environment has become more complex, and pressure to optimize investments and compensate for sluggish performance of offline promotion efforts are greater than ever, he says.

It will be both a challenge and an opportunity for the industry to evaluate strategies and new delivery methods to share the critical information that physicians need to make informed prescribing and patient-care decisions, says Cherie Hicks, president of CMR Institute.

"Today's treatments and drugs are increasingly complex and personal exchanges between highly educated sales reps and physicians tend to be extremely effective because this method creates an immediate opportunity for dialogue and interaction," Ms. Hicks says. "Technologies, such as Web conferencing, are the tools to use to support other means of live interactions when face-to-face dialogues aren't possible."

THE IMPACT OF NEW TECHNOLOGY

The hottest new media trend appears to be the smartphone; adoption continues to surge. Almost three-quarters of U.S. physicians own one, according to Manhattan Research. The range of activities physicians perform on mobile devices, as well as the frequency of use, is growing, with more than two of five physicians using the Internet during patient consultations, most-

ly on a handheld device. Not only are physicians using mobile devices more readily, but there are solutions being developed to use the iPhone for hospital administration tasks, such as voice-enabled unified communications and multimedia collaboration tools. These would enable healthcare companies to address key processes, such as care coordination and patient flow, and to help ensure their efficient operation.

Healthcare providers can now access everything from their mobile devices — patient data, clinical trials, drug information — and pharma companies should be using that avenue to reach the physician community.

"In this information explosion age, the ability to reach physicians through their preferred method with pertinent information is key to interacting with them today," Mr. Gupta says.

Handheld devices have already had a considerable impact on the way physicians access professional resources and services, and mobile will be an even more integral part of the physician workflow over the next few years. For marketers this means ensuring that sites are optimized for mobile access or that a mobile app is an option. With physicians beginning to rely more and more heavily on their mobile devices for consuming content while completing their clinical tasks, it becomes all the more of a necessity for mobile optimization of content to occur. Additionally, marketers should understand the mobile behaviors and device preferences for their target audiences and consider investment in relevant mobile opportunities.

Also, although search is sometimes considered a less buzz-worthy topic than mobile, video, and social media, search engines continue to be the primary gateway to online content for physicians and consumers, Mr. Avallone says.

"For example, the increase in physician use of blogs, message boards, and other user-generated content found in an open forum can be partially attributed to the fact that search

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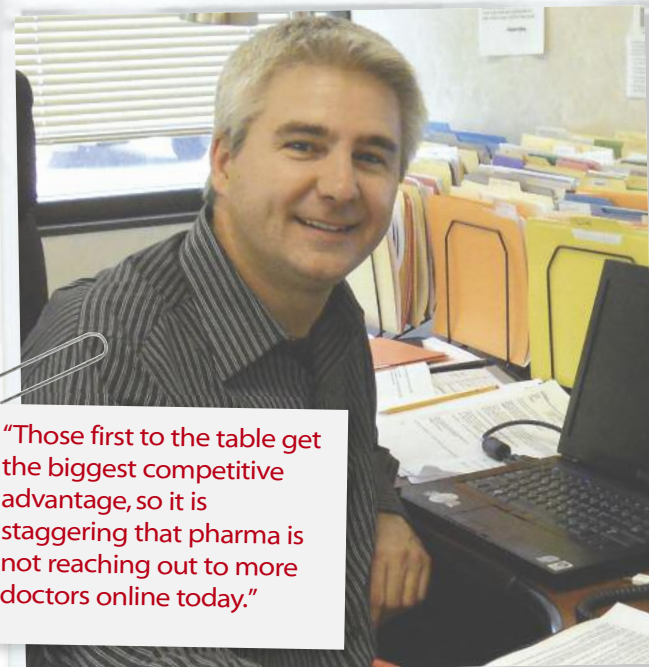
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R.J. Lewis, e-Healthcare Solutions



"Those first to the table get the biggest competitive advantage, so it is staggering that pharma is not reaching out to more doctors online today."

"In a surrounding world of change and turmoil, it's nice to know that the sales rep is still the most important channel to our customers."

When the sales rep is not around, physicians are going to the Web for drug information and they are engaging in online medical journals. This is where marketers should be, according to Mr. Lewis.

"Looking at the Manhattan Research data as well as the Nielsen data, two things become very apparent," he says. "Physicians are going online today to research drug information. They

are going to portals such as drugs.com, rxlists.com, and pdr.net; these sites are often appearing higher in the search results than the brand's own Web site, so it is very important for brands to have a presence on these portals.

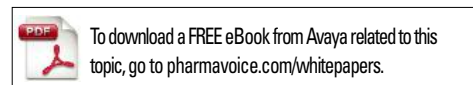
"The second place physicians turn to for drug information is still medical journals; they are the second-most popular online resource for doctors, and their Web sites are gaining popularity as physician readership shifts from



print to online, according to Manhattan Research," he adds.

Mr. Lewis suggests that marketers also focus on the professional society and association Web sites, in particular, since 94% of physicians use professional society association Web sites and a full 40% use them every week. ♦

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engines favor this type of content," he says. "Marketers should factor search considerations into their plans for newer media initiatives."

SALES REPS STILL PART OF THE MIX

According to results of a recent Kantar Health report, sales rep interaction is still the preferred method through which physicians want to receive their drug information.

"In a surrounding world of change and turmoil, it's nice to know that the sales rep is still the most important channel to our customers," says Mark Sales, global practice leader for stakeholder management, Kantar Health.

Technology definitely has its benefits, Ms. Hicks says, including delivering vital information to physicians quickly and supporting the needs of physicians who prefer more self-directed learning methods. But today's physicians are also demanding information beyond the marketing message, and they want specific answers concerning their patients.

"This is best supported by live interactions, whether they are face to face or via online conferencing, with professionals, including representatives, who are highly educated in science, disease states, outcomes management, and evidence-based medicine," she says. "Physicians value information from sources they trust. So above all, the focus needs to be on the quality of knowledge-based information, the credibility of the resource delivering it, and the applicability to the physicians' patients."

Experts on this topic

JAMES AVALLONE, Senior Digital Analyst, Manhattan Research LLC, a market research and advisory firm for global pharmaceutical and healthcare companies. For more information, visit manhattanresearch.com.

SANJEEV GUPTA, General Manager, Healthcare Solutions, Avaya, a global provider of enterprise communications systems. For more information, visit avaya.com.

CHERIE HICKS, President, CMR Institute, a not-for-profit, 501(c)3, independent educational organization that provides education and professional certification and promotes national standards for pharmaceutical representatives and managers. For more information, visit cmrinstitute.org.

GAURAV KAPOOR, Head, Strategic

Marketing Solutions, Indegene, a service provider that enhances commercialization and marketing success of life-sciences companies through its ability to understand, analyze, and apply knowledge of science and clinical practice. For more information, visit indegene.com.

R.J. LEWIS, President and CEO, e-Healthcare Solutions, a vertical Internet advertising network dedicated to healthcare, exclusively representing online advertising and sponsorship opportunities of a large portfolio of medical publishers. For more information, visit e-healthcaresolutions.com.

MARK SALES, Global Practice Leader, Stakeholder Management, Kantar Health, a healthcare-focused global consultancy, delivering evidence-based guidance to support clients' success. For more information, visit kantarhealth.com or e-mail mark.sales@kantarhealth.com.

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BY ROBIN ROBINSON

Creating a *Media Fit* for Physicians' NEEDS

Our experts caution against using technology for the sake of technology and suggest the focus needs to be on reaching physicians where and how they want to be reached.

When considering how to successfully communicate with each physician, it is vital to consider individual physicians, their specialty, their current use of technology, their comfort level for learning new technologies, and their personal preferences for receiving information, says Cherie Hicks, president of CMR Institute.

"Ultimately, successful communication is dependent on the message, regardless of the technology used," she says. "The information conveyed and the channels through which it is

Cherie Hicks, CMR Institute



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delivered must be focused on the physicians' needs and what they value: that's the bottom line."

Research shows that physicians find interactions valuable when reps understand the pertinent factors that impact their practices and their prescribing decisions and have broader healthcare knowledge to answer a physician's specific questions effectively.

Technology and therapeutic category are both significantly important in the sales transaction, says Gaurav Kapoor, head of strategic marketing solutions at Indegene.

"Information exchanged about products must be founded on a solid working knowledge of the specialty and the related patient populations, and the ability to effectively communicate it," he says. "Clearly, the more specialized the product and the more details involved, technology can be leveraged to support this communication. For example, sophisticated illustrations and videos can be used to explain drug mechanisms of action or drug application techniques.

"Success of an alternate channel of engagement relies heavily on strong analytics and dynamic personalization," Mr. Kapoor says.

Reach, content needs, channel preferences, and peer-influence varies from one physician type/therapeutic category to another.

"Our experience suggests that while oncologists, ophthalmologists, and neurologists spend 12 to 15 minutes on average every fortnight on case simulations and insightful discussions with on-demand MSLs, primary-care physicians spend about four to five minutes on average during the same time period," Mr. Kapoor reports.

Physicians in the cardio-metabolic space spend about six to eight minutes on average every month on innovative e-details and con-

Sales Performance Relationships with Physicians

In a market research report, Kantar Health evaluated sales representative performance in building strong relationships with physicians.

The research uses Kantar Health's TRI*M index, which provides a measure for customer retention and an overall rating of how well a salesforce interacts with its customers to build strong relationships. The TRI*M indices are derived directly from the surveyed physicians' own evaluation of the skills of a company's sales reps and how these influence a physician's intention to prescribe a brand.

According to Kantar Health researchers, historically customer retention has been important to a successful business model, but it appears that more than ever during the economic downturn it takes center stage along with trust and reputation in a company's strategy.

In the United States, eight of the 16 companies measured have seen their scores rise. Four companies are tied for first place: AstraZeneca, Merck, Novartis, and Takeda. Takeda showed the greatest increase in retention scores, from 73 to 83.

Kantar Health researchers say Takeda has managed to completely change its market resistance profile in the United States, from a ratio of 1.5 to 0.88. This means that the company has converted many of its customers to become advocates of the organization who were previously rebels. A good market resistance score shows a positive environment for Takeda to sell in, and implies a large proportion of its customers would be advocates in a launch situation.

Another example of a dramatic company improvement is in the United Kingdom. The research showed scores from British primary-care physicians have increased noticeably since last year. AstraZeneca and Pfizer received the top scores from these physicians. In fact, the scores for these two leading companies increased compared with last year.

GSK and Novo Nordisk came in second place, with both of these companies showing dramatic improvements in the relationship building ratings that primary-care physicians gave them.

cise educational pieces of content, including clinical papers, landmark trials, KOL videos, etc.

According to Mr. Kapoor, the method for engaging physicians depends on three important factors: product life-cycle stage, physician type, and disease specialty.

“At the launch stage, where the goals are predominantly to reach peak sales in the shortest time period, successful engagement strategies involve complementing conventional sales calls with alternate — Web-based and mobile — media, including highly engaging scientific case simulations, congress updates, and video calls through MSLS,” he says. “Our experience shows that a blend ratio as high as 50:50 can be employed to generate better share of voice and establish greater connection with early adopters and specialists.”

Innovative treatments, diagnostic tools, and cutting-edge medicine would not exist without technology, Ms. Hicks says.

“As an industry rooted in these advancements, we would be remiss not to explore new communication tools or delivery methods that may lead to improved patient outcomes,” she says.

Testing these new strategies and channels should be investigated, but not by compromising standards in the pursuit of convenience and reduced costs.

“Technology should be leveraged to complement live interactions and reinforce the knowledge-based information exchange,” Ms. Hicks says. “New technologies, such as decision-support platforms, dosing calculators, and patient and side-effects management tools, provide innovative ways to add value and reinforce previous information exchanges.” ♦

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