



Strategies to Enhance TREATMENT PERSISTENCE

New research from Datamonitor finds that the medical establishment's approach to adherence is changing as it becomes clear that the responsibility of achieving adherence is not solely the patient's, but rather is shared among stakeholders.

The report shows that physicians who do not take the time to understand their patients can negatively impact adherence by failing to take into consideration factors that may make it difficult for patients to follow a medication regimen. Strategies to support patients would involve collaboration between a variety of stakeholders, including physicians, patient groups, payers, and the pharmaceutical industry. But collaboration has proven to be complicated, often because there is little or no consensus about how to define or measure adherence.

Reaching customers through customized interactions will help to make them feel as though they are valued and understood. Furthermore, with regard to disease-management programs in particular, the more accurately targeted the program the more likely it is to affect a behavioral change in the patient.

European Consumers' EMBRACE INTERNET FOR HEALTH INFORMATION

In Europe, where strict regulations currently gov-

ern the communication of information about prescription medicines and treatment alternatives, the primary pharmaceutical marketing focus to date has been directed at the people who write the prescriptions: the physicians.

A report from Manhattan Research, Cybercitizen Health Europe, reveals European consumers' attitudes and preferences for finding information. It finds that European consumers are just as satisfied with the Internet as a source of information as they are with their personal physician or nurses — 52% are very satisfied with the health information they receive online. In fact, the physician is competing with the Internet as a first response among online consumers.

Among consumers searching for health information online, almost half (47%) report changing actions or behaviors offline as a result of accessing health information online.

The report ranks the pharma Websites visited by European consumers (see chart below), and shows that while consumers in Europe are less likely than consumers in the United States to research drug information online, 30% of online consumers in Europe research pharmaceuticals via the Web today. Moreover, 74% of online consumers in Europe are using the Internet for health and pharmaceutical information.

While there is no DTC advertising in Europe, the findings show that with three quarters of online consumers proactively looking for health and pharmaceutical information online, companies have an audience that recognizes the value of online health information resources without mass media promotion to drive them to drug Websites. The issue facing pharmaceutical companies is whether to provide disease education through internal efforts or to partner with a rapidly emerging field of health information portals that are gaining ground on a country by country basis (primarily driven by language barriers preventing a pan-European brand today). As the portals gain ground, and a growing number of pharmaceutical companies place patient education and disease-education resources online, analysts predict

TOP 10 GLOBAL PHARMACEUTICAL CORPORATE SITES

RANKED BY NUMBER OF EUROPEAN CONSUMER VISITORS

RANK	WEBSITE
1	Pfizer
2	Bayer
3	GlaxoSmithKline
4	AstraZeneca
5	Roche
6	Novartis
7	Merck
8	Sanofi-Aventis
9	Boehringer-Ingelheim
10	Wyeth

Source: Cybercitizen Health Europe v7.0, Manhattan Research LLC, New York. For more information, visit manhattanresearch.com.

a second wave of pharmaceutical marketers following in the steps of the ones embracing marketing innovation today.

Verispan's 2007 Audit MOVES MERCK INTO TOP THREE

For the first time in four years, Merck was ranked among the top three pharmaceutical companies overall by managed care medical directors in Verispan's spring 2007 Managed Care Medical Director Promotional Audit. The overall ranking calculated by Verispan is based on five assessment areas: clinical objectivity, value-added services, disease management, account personnel, and corporate approach.

Since 2003, Merck had received an average rank of seventh. Between fall 2006 and spring 2007, Merck's rank improved in four of the five assessment categories. The company's most notable improvements appeared in the clinical objectivity and disease-management categories, where Merck advanced from No. 6 and No. 5, respectively, to No. 1 in both areas. For disease management, Merck tied with Pfizer.

MEDICAL DIRECTORS RANK TOP COMPANIES

BEST OVERALL COMPANY	RANK
Pfizer	1
Merck	2
GlaxoSmithKline	3

Source: Verispan's spring 2007 Managed Care Medical Director Promotional Audit. For more information, visit verispan.com.

For the sixth consecutive audit cycle, medical directors ranked Pfizer No. 1 overall. The company took the top spot in three of the five assessment categories, including account personnel, where it has been the sole leader since fall 2004.

Verispan's managed-care medical director promotional audit is based on the responses of medical directors who represent a large portion of American lives covered by HMOs. These medical directors reported promotional activity by pharmaceutical firms in an eight-week period in spring 2007. They also rated companies on their ability to meet the managed care industry's needs in five areas.

Insurers WANT MORE PRESCRIPTION DRUG USE in Some Categories

A study shows managed care organizations (MCOs) understand there is unrecognized pharma-

PERCEIVED APPROPRIATENESS OF DRUG USE

	RESTRICTIONS RISK (OVERUSE) CATEGORIES	GROWTH OPPORTUNITY (UNDERUSE) CATEGORIES
Criteria explored	<ul style="list-style-type: none"> • Inappropriate patients on therapy • Patient overuse of agents 	<ul style="list-style-type: none"> • Appropriate patients not on therapy • Patient noncompliance
Drug categories	<ul style="list-style-type: none"> • Sleep disorders • Chronic pain • GERD 	<ul style="list-style-type: none"> • Hypertension • Asthma • Lipid Management • Anxiety/Depression • Schizophrenia • Diabetes • Smoking Cessation • HIV/AIDS

Source: Putnam Associates, Burlington, Mass.
For more information, visit putassoc.com.

cogenomics value to be had by increasing patient use within certain drug categories.

This is one of the findings in a study by Putnam Associates into U.S. health insurance plans' perceptions of branded prescription drug use in the United States.

Putnam discovered eight classes of drugs, accounting for more than \$100 billion in sales, where insurers believe that increasing the number of patients on therapies and getting those patients with prescriptions to take their drugs would create value for both patients and plans in the long term. These categories are: hypertension, asthma, lipid management, anxiety/depression, schizophrenia, diabetes, smoking cessation, and HIV/AIDS.

MCOs recognize that correcting underuse of prescription drugs and noncompliance in specific therapeutic areas can contribute to better patient outcomes and an improved bottom line.

Pharma Market Research Teams **OUTSOURCE 90% OF WORK**

Pharmaceutical teams outsource almost 90% of their primary market research as drugs go through clinical testing and approach market launch, according to a new study by Cutting Edge Information. This widespread outsourcing makes vendor management a critical part of the market research process.

The study, Developing Integrated Market Research Functions: Decision Support for 2008, finds that the average U.S. market research budget in 2006 was more than \$2.5 million. In 2007, that figure dropped to slightly less than \$2.0 million. Market research spending outside of the United States increased by an average 42.9% reaching \$2.9 million in 2007.

Most of those market-research investments ultimately pay for outsourced tasks. Vendors are almost always involved in the variety of jobs that make up primary market research, which is outsourced by 89.5%

of survey respondents. Secondary research, on the other hand, is outsourced by 57.9% of companies.

Pharmaceutical teams often have the resources to conduct their own screens of secondary research, but many drug companies find it more cost-effective to avoid conducting any in-house primary market research of their own.

In the United States, the average portion of the market-research budget outsourced tends to climb as a product approaches launch. Outsourced U.S. market research claims increasingly large percentages of the average budget until allocations peak at 86% during the product's launch period.

Follow up

CUTTING EDGE INFORMATION, Durham, N.C., provides research and consulting to the pharmaceutical industry and the financial services industry. For more information, visit cuttingedgeinfo.com.

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MANHATTAN RESEARCH LLC, New York, is a healthcare market research and services firm that helps healthcare and life-sciences organizations adapt, prosper, and explore opportunities in the networked economy. For more information, visit manhattanresearch.com.

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