



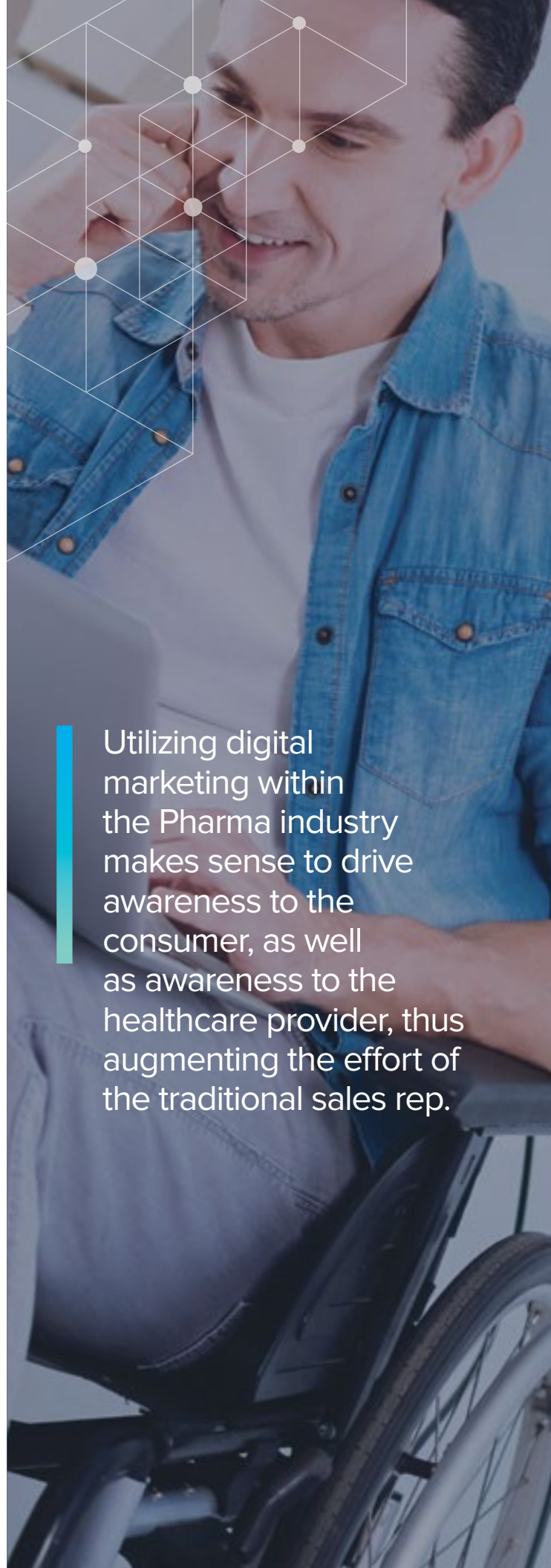
The Role of Digital Marketing in Pharma

The way patients and consumers interact with health and healthcare continues to shift. Regulation, curiosity, measurement, a need for transparency, and changing consumer consumption habits are forcing healthcare marketers to reevaluate their marketing strategies. Healthcare providers feel this change as well, as they shift the way they market their practice.

These Healthcare providers are taking a mobile first mentality, reducing friction in the patient journey, and focusing on service over sales copy. Making information easy and quick to find allows patients to find information and move on, all while earning viewable impressions along the way. One such provider is one of our clients, a regional provider who saw a 30% increase in the amount of new patient appointments they received overall and a 90% increase in the amount of appointments made online, simply by focusing on being present for valuable searches and reducing friction. The most telling statistic was the fact mobile accounted for 75% of their new patient appointments, when 3 years ago, mobile accounted for 10% of new patient appointments.

In conversations with executives at organizations in the Pharma and Healthcare industries, they generally view digital marketing as an 'add-on' to their existing marketing strategy.

Utilizing digital marketing within the Pharma industry makes sense to drive awareness to the consumer, as well as awareness to the healthcare provider, thus augmenting the effort of the traditional sales rep.



When probed as to why they do not see Digital driving the conversation, they often default to the view that Digital Marketing is reserved for organizations selling direct to consumer. If the organization in Pharma is not selling a particular product on their own site, it doesn't warrant an investment in Digital, according to executives we spoke with.

Utilizing digital marketing within the Pharma industry makes sense to drive awareness to the consumer, as well as awareness to the healthcare provider, thus augmenting the effort of the traditional sales rep. A study from CMI/Compass highlights 48% of doctors are taking less sales appointments and a Google study reports doctors spend more than 180 minutes a week watching video content for Professional purposes. One could argue the time they were previously allocating to sales reps is being spent watching video content, listening to webinars, and reading about the industry. This alone presents a significant opportunity for organizations within the Pharma industry to leverage Digital Marketing to reach doctors.

So how would executives within the Pharma industry leverage digital marketing to achieve the goals of their marketing strategies? Let's break down the role that digital marketing plays within the patient journey, then layer on how this plays into reaching the doctor.



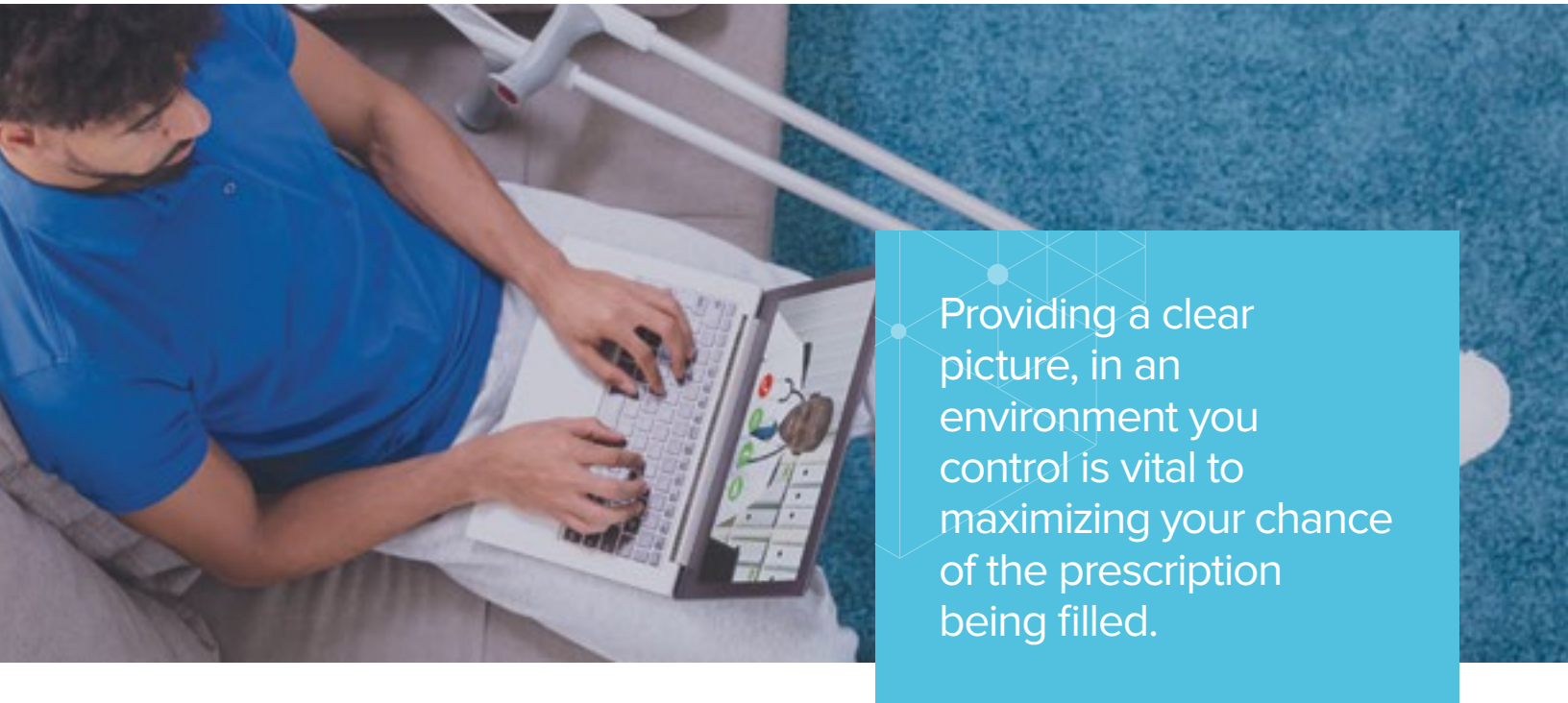
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Control the Consumer Experience

According to data from Google, 60% of consumers research their prescriptions after their doctor visit to understand them, and then determine if they will fill the prescription. While Pharma companies want to ensure the doctor is prescribing their product, if the consumer never fills the script, then those marketing dollars are not best spent. Earning the prescription is part one, but understanding consumer behavior and focusing on providing the consumer information

relative to why they should fill their prescription is an even more vital role. If over half of consumers research your particular product or drug today, what would they find?

Pharma manufacturers need to own the experience, especially when a consumer is looking for your product specifically, let alone category level searches.



Providing a clear picture, in an environment you control is vital to maximizing your chance of the prescription being filled.

Further complicating the matter for Pharma organizations are online communities in which consumers share and discuss their experiences with drugs, equipment, and institutions. While consumers welcome social feedback (90% of patients 18-24 would trust medical information shared via social networks), not all feedback on these sites is accurate, but most of all environments in which a Pharmaceutical brand doesn't own. Pharma manufacturers should have educational content available on their site that helps inform the consumer about side effects, dosing instructions, performance, as well as informing the patient about the overall experience and post care. Once the patient leaves the provider's office there are generally questions, such as: Why do I feel this way? What am I allowed to eat? Am I able to drive? These are questions that family members

might be able to help with, but a Pharmaceutical organization should work to control. Providing a clear picture, in an environment you control is vital to maximizing your chance of the prescription being filled.


One such example of this is NeoCare Solutions by Aetna. This service, aimed at new parents returning home after neonatal care, provides relevant content on what to expect, as well as free on-demand coaching. Most of this content is pre-recorded, but answers many of the questions sought by these parenting novices, thrust into an even more difficult situation.

Reach & Frequency = Awareness

Historically, Pharma marketing consisted of utilizing mass channels, such as TV, Radio, and Print to reach consumers. The hope was the consumer would see this ad and ask their doctor about the drug/device, if it applied to them. These mass channels provided large numbers of impressions, which looked great on a marketing strategy. We reached an audience of millions with our product, however, how many of that audience was someone suffering from the condition your drug may help, or would be eligible for your device?

Despite not having a product to sell direct to consumer, marketing within the Pharma Industry is a pure play for Digital. The reasons come down to the fundamental benefit of digital vs. mass, which is targeting.

Non-direct response search advertising, like banner ads through the Google Display Network, allow you to place your ad on particular articles and websites answering patient queries relative to your product, category, or pre-appointment information. If a consumer wants to 'self-diagnose' through a site like WebMD, a brand is able to place a banner ad next to the page speaking about that particular symptom, procedure, or illness. Brands are also able to target consumers based upon demographics, keywords, as well as interests. An example of this is an avid runner has a degenerative ankle condition, such as Peroneal Tendonitis. A brand offering non-surgical treatment for Peroneal Tendonitis, such as a brace or walking boot, may run banner ads on popular running magazines or websites. Additionally, targeting could be layered on top of this to only target consumers who have an interest in running, or have searched for non-surgical treatment of Peroneal Tendonitis.



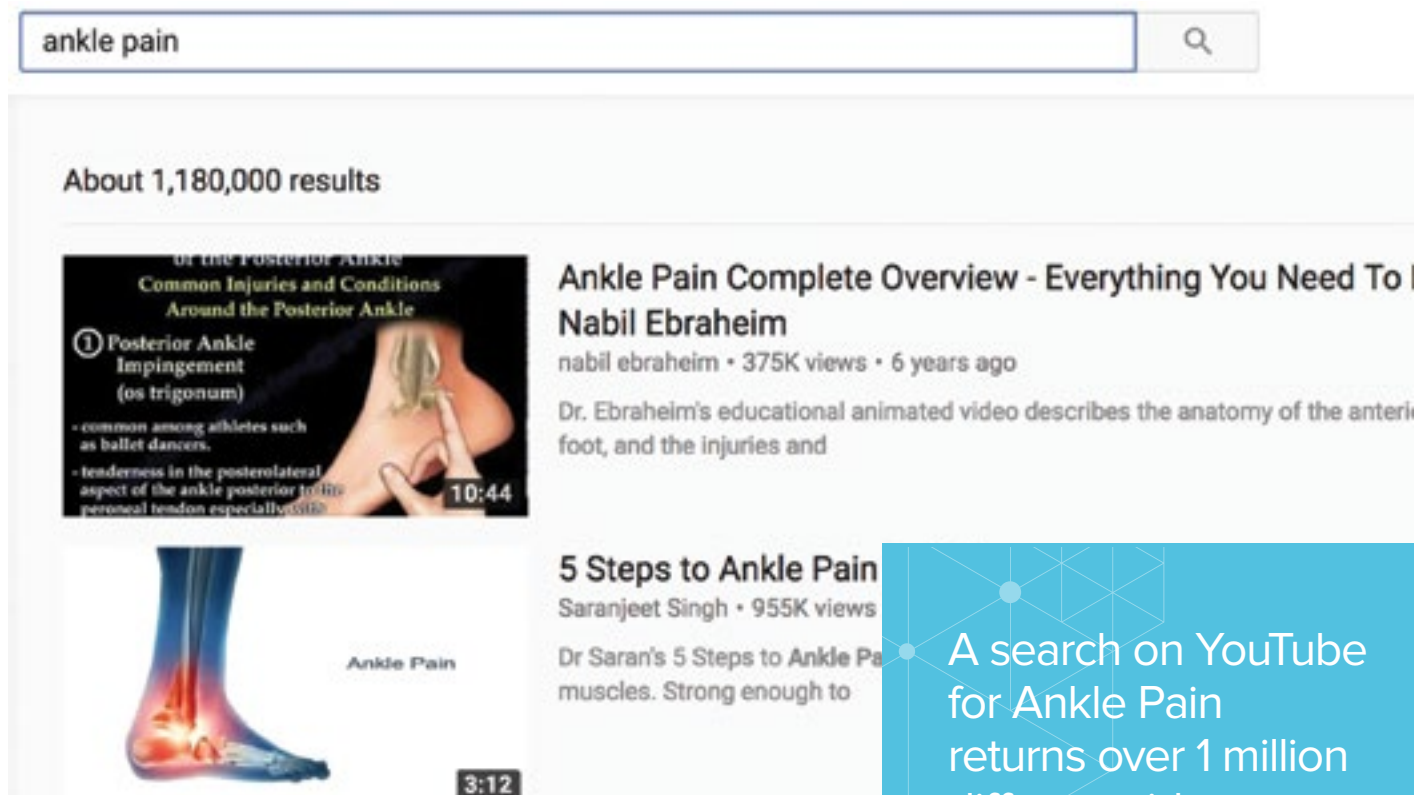
A marketing rule of thumb is if your consumer is there, you should be there and smart Pharma marketers are utilizing all of these digital channels to drive awareness, especially surrounding product launches.

Social Media Advertising enjoys targeting options significantly more advanced than search. For example, you are able to target consumers who purchased pain killers, based upon data provided to Facebook by aggregators. This would allow a brand with a pain injection product to target individuals who are currently purchasing these OTC products today.

A search on YouTube for Ankle Pain returns over 1 million different video results, with many of the videos earning over 700k views. With the statistic provided earlier that Doctors are watching 180 minutes

of video content each week, leveraging this channel to provide a visual representation of information to the doctor and patient, is vital to improving awareness. According to Isivia, viewers retain 95% of a message when they watch it in a video compared to 10% when reading it in text. Providing both, is the ideal mix.

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Leveraging Data Insights

The age of data is among us and with that comes the even bigger problem with data; using data to make decisions. Smart Pharma marketers are using 'Patient Finder' automation to mine medical records and identify individuals that share traits with those who are currently suffering from a particular condition, yet not diagnosed yet. This data could then be used to fuel marketing decisions, advertising targets, and improve awareness. This type of targeted messaging using pre-

dictive data insights may initiate a doctor visit that would not have been made without the information provided in the ad.

Consumers are growing increasingly confident with their ability to make health decisions, without consulting their doctors. The volume of health information available online, as well as the growth of wearables (Apple Watch, Samsung Gear, FitBit) are fueling consumer confidence in taking care of their own health. Smart Pharma marke-



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ters are leveraging this data to augment data the consumer already has about themselves, pulled from their fitness trackers or exercise apps. According to research from a study by Ipsos, over 85 percent of patients feel confident in their ability to take responsibility for their health and knew how to access online resources to improve their health.

Lastly, organizations within Pharma should be listening to conversations happening online relative to their product category and speci-

fic product. The online communities mentioned earlier is a start, but also utilizing social listening software to monitor conversations may prove beneficial relative to consumer feedback and sentiment. This insight may help fuel marketing messaging, as well as R&D.


With the wealth of data available, marketers should be using as much as possible to identify better targeting opportunities, understand impact of that data, as well as ideate new ideas to reach the target consumer.

Embrace Mobile: However, it is not all about the app

In 2012, a Google study highlighted mobile accounted for $\frac{1}{3}$ of all health-care related research, especially as it came to booking an appointment. Six years later, that data is closer to $\frac{3}{4}$ of all research. Mobile is no longer a companion and has become the primary driver of connectivity, thus the primary device used for information seeking. While mobile in intent, most of this research is happening while at home, presumably as a second screen while consuming other content.

As it relates to doctors, 81% of doctors carry their smartphone and use it for professional reasons during the day, according to a study by Kanter media. Whether it is consuming content, such as a journal, or watching a video about a particular device, mobile is a significant driver of discovery for healthcare providers, as well as consumers seeking information.

Much of this research doesn't require an app, as search plays a role 77% of the time prior to booking an appointment (Google study). While an app may have a specific use case for a brand, it isn't required to excel in reaching the consumer on mobile.

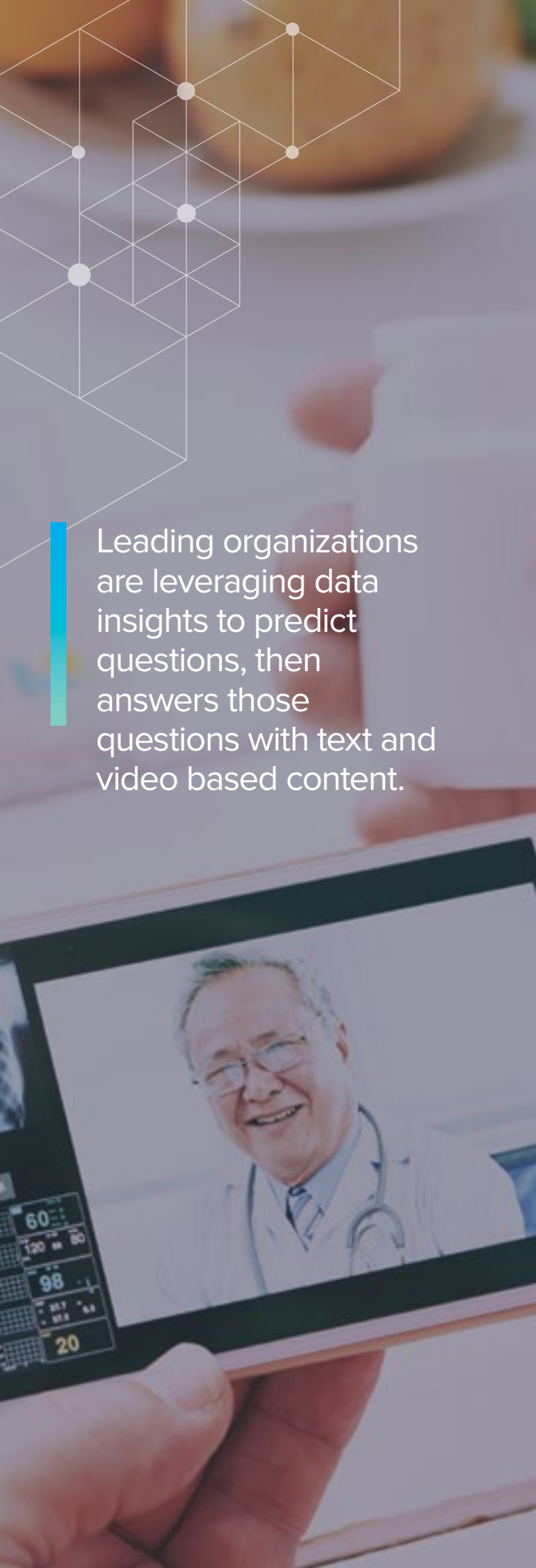


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Understanding the role and finding value in Digital Marketing

Organizations in the Pharmaceutical Industry are met with much regulation as it pertains to marketing. What messaging is compliant? Where are ads able to be run? How does our marketing reach the right audience? Executives within Pharma who are not leveraging Digital Marketing as a significant driver of their overall marketing strategy run the risk of missing the consumer at the point of research, thus conceding the decision to a competitive offering. Leading organizations are understanding the role digital plays in the patient journey, and the role the consumer plays in the journey with the healthcare provider. Leading organizations are leveraging data insights to predict questions, then answers those questions with text and video based content.

When launching a new product, it is almost required that Digital play a significant part of the marketing strategy. From saturating the consumer experience online when launching the product at a trade show, to a strong consumer push via advertising, Digital allows you to reach the audience in a medium that is easier to measure, despite the smaller 'impressions.' Is Digital Marketing a significant part of your new product strategy? Are you leveraging Digital Marketing to reach potential new patients? Are you targeting doctors online with helpful content and videos? If you answered no to any of these questions, it may be time to rethink your marketing strategy and leverage valuable insights to achieve your strategic goals.



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