



THE BRAVE NEW WORLD OF DIGITAL HEALTHCARE

**Ipsos Hong Kong
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PHARMA MARKETING NOW A MULTI-CHANNEL CHALLENGE

From a pretty straight-forward proposition, the pharmaceutical and healthcare marketing landscape has shifted rapidly to leverage new media and technology, which has started to completely transform the playing field. While rapidly proliferating content online feeds consumers' demand for health information; the proliferation of gadgets, apps and Web-based information has given physicians a black bag of new tools: new ways to diagnose symptoms and treat patients, to obtain and share information, to think about what it means to be both a doctor and a patient. Digital channels also offer pharmaceutical companies unparalleled potential to reach and interact with physicians and patients.

Success in this increasingly digital world for pharmaceutical companies means not only significantly increasing their investment in digital marketing strategies (including websites, e-marketing, social media and healthcare digital applications and services) but also adopting a different orientation to engage and interact with patients on an unprecedented scale.

PHYSICIANS HAVE HIGHER EXPECTATIONS OF PHARMA E-CHANNELS¹

Not unlike other consumers, Hong Kong doctors expect pharma e-platforms to be: Easy to access, time and cost saving, generating prompt responses via e-channels and useful in enabling physicians to help their patients and do their jobs more efficiently.

A recent study by Ipsos Healthcare shows that HCPs have gone digital-75% of Hong Kong physicians browse the internet several times a day at their workplace and each time spend less than an hour gathering health, medical or prescription drug information.² This offers a unique opportunity for pharmas to rethink the tool set provided in marketing communications. However, we observed that in Hong Kong, pharmaceutical companies are still working to understand the vast opportunities presented by digital and mobile media. Only a few pharmas seem to be proactively creating new solutions for digital

marketing and e-detailing, while for most of the others, such efforts are an “add-on” to existing marketing strategies and tactics rather than representing a truly 360 degree view of the communications strategy.

While no pharmaceutical company in Hong Kong has been recognized as a pioneer in launching E-channels. Although GSK (18%) and Pfizer (14%), Roche (12%) and AstraZeneca (10%) have been mentioned at the top of the

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list -according to a recent survey conducted by Ipsos Healthcare Hong Kong.³ Several pharma giants in Hong Kong are pushing hard to develop and use digital marketing and e-detailing platform, however, these platform are only being rated as “Average” by doctors in Hong Kong.

In a recent interview Dr. Au-yeung Cheuk-lun, Henry, specialist in Paediatrics, commented that,⁴ “I used to go to one of these drug websites and e-platforms when it was first launched, however, I found it not very useful as there’s not much updating and the information provided is not very helpful for my day to day patient management nor is the content exciting... later, I didn’t go there to browse anymore and now forget the log-in details.”

Pharma companies need to develop and sustain useful digital channels to boost speed and efficiency, so physicians can focus on building stronger doctor-patient relationships.

PATIENT DOCTOR ROLES REDEFINED BY TECHNOLOGY

Digital and mobile technologies are transforming the delivery of health services. From chronic disease management to empowering the elderly and expectant mothers. From medication reminders to reaching underserved populations – technology is expanding the ability of healthcare professionals to enhance their positive impact on patient health and well-being.

Dr. Ng Chun Kit, Specialist in General Surgery, evaluates today’s level of access to medical information through digital and mobile media.⁵ “While previous technologies have been fully under doctors’ control, the Internet, digital and mobile media has led healthcare to be equally in the hands of patients,” he continuous, “Such access is redefining the roles of physician and patient.. Doctors won’t go away, but we will have a lot more information about patient and consumer health at our fingertips, and it will stream in from more

sources than ever before. The impact of this shift on the healthcare system and how consumers and patients use and act on health information should not be underestimated.”

For an idea of how fast the digital healthcare arena is expanding, below is just a quick list of some new developments specifically designed to leverage technology for improved healthcare:

- Ambio Remote Health Monitoring System automatically records vital sign readings (glucose, blood pressure, weight, etc.) on a health portal and provide tools for members and their care circle to help them stay healthy. www.ambiohealth.com.
- Patient App, Medication Reminders and CHF Surveys added to MobileCare Monitor, which promotes patient and family engagement while expanding the range of alertable health-related parameters using AFrame Digital's real-time, continuous and nonintrusive monitoring solution. AFrameDigital.com.



- Philips announces GoSafe, a Mobile PERS which bundles fall detection capabilities and power-efficient design that allows up to seven days between charges. It also includes a senior-friendly charging cradle. GoSafe has a suite of locating technologies and two-way cellular voice communication to boost user confidence in day to day activities. <http://philipslifelinegosafe.com/new>.

- BrightLife Innovations – unlimited video calling in senior housing. The system features a large high definition screen with a simple senior friendly remote control that is easy for senior residents to use, requiring no computer experience or equipment of their own. <http://easyconnecthd.com/>.
- Care Technology Systems monitoring technology, QuietResponse™ consists of

sensors (motion, door, fluid, pads) placed throughout the home (in beds and on chairs, on doors, refrigerators and on the toilet water tank) to gauge “normal” life patterns, so when a condition is outside of normal, or signals a potential medical issue, notifications can be sent by text, email, page or phone to caregivers so they can respond. <http://www.caretechsys.com/>.

MHEALTH: THE NEW NORMAL?

mHealth refers to the provision of healthcare of health-related information through the use of mobile phones/ Smartphone applications and services including, remote patient monitors, online consultations, wireless access to patient’s records and prescriptions. As e-channels, digital and mobile health now enter the commercialization phase, mHealth services alone are expected to reach \$26 billion globally by 2017.⁶ With the rising ubiquity of smartphones, the market for mobile health apps is expected to quadruple to \$400 million by 2016.⁶

A 2011 global survey of 114 nations undertaken by the World Health Organization found that mHealth initiatives have been established in many countries, but there is variation in adoption levels.⁷ The most common activity was the creation of health call centers, which respond to patient inquiries. This was followed by using SMS for appointment reminders, using telemedicine, accessing patient records, measuring treatment compliance, raising health awareness,

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monitoring patients and physician decision support.

Nearly a third of Hong Kong consumers had great interest in mHealth applications and services, from an Ipsos Hong Kong Healthcare nationally representative survey conducted last month. Most interesting for HK consumers is the ability to manage their own well being (37%), gather info on healthcare and drugs (36%) while the top two mentioned benefits perceived are to reduce overall healthcare cost



(37%) and improve the quality of healthcare received (30%).⁸

“It is clear from all these findings that pharma companies’ ability to control the message is no longer possible.” Carmen Li, Director of Ipsos Healthcare Hong Kong said, “The opportunity for the industry is to reframe the conversation to engagement and interaction, to be part of the conversation by demonstrating how new channels of healthcare communication can significantly benefit patients.”

THE WAY FORWARD

By reframing and redesigning their touchpoint and communication strategies, pharma companies will boost their ability to deliver against both physician and consumer expectations. While there will always be a role for traditional healthcare service delivery, successful pharma companies of the future will deploy smart and compliant digital/ mobile solutions to satisfy their multiple stakeholders, including physicians,

medical professionals, patients, consumers and caregivers.

References:

1. By nature e-detailing is defined within three different categories:
 - Tablet e-detailing: A sales rep using a device such as an iPad to present a digital detail to a HCP.
 - Self-service: A HCP visits a web-based digital detail, typically in the format of an HCP service portal.
 - Virtual rep: A digital detail with the rep in one location and the HCP in another.
2. Ipsos Healthcare Hong Kong , “2012 Physicians and Consumers Online Behavior Survey- eHealth Study”, December, 2012
3. Ipsos Healthcare Hong Kong , “2012 Physicians and Consumers Online Behavior Survey- eHealth Study”, December, 2012
4. Ipsos Healthcare Hong Kong , “2012 Physicians and Consumers Online Behavior Survey- Qualitative Interview with Hong Kong Physicians”, January, 2013
5. Ipsos Healthcare Hong Kong , “2012 Physicians and Consumers Online Behavior Survey- Qualitative Interview with Hong Kong Physicians”, January, 2013
6. Research2guidance, Global Mobile Health Market Report 2013-2017



7. World Health Organization, “mHealth: New Horizons for Health Through Mobile Technologies”, Global Observatory for eHealth Series, Volume 3, 2011.
8. Ipsos Healthcare Hong Kong, “2013 Consumers mHealth Survey”, February 2013

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About Ipsos Healthcare:

Ipsos Healthcare is dedicated to understanding the motivations, behavior and influences of the multiple stakeholders driving commercial success in the healthcare industry. In doing so, we guide pharmaceutical, biotech and medical device companies in building successful brands and optimizing their sales potential. A global business division with particular strength in emerging markets, we are 500 healthcare market research experts in 40 countries – offering innovative custom solutions and market-leading syndicated services.

About Ipsos:

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. In October 2011 Ipsos completed the acquisition of Synovate. The combination forms the world's third largest market research company. With offices in 84 countries, Ipsos delivers insightful expertise across six research specializations: advertising, customer loyalty, marketing, media, public affairs research, and survey management.

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