

CYBERCITIZEN® HEALTH EUROPE
Targeting Today's Online Health Consumer
Understanding Tomorrow's Extended Impact

United Kingdom • France • Germany • Spain • Italy •
Belgium • Sweden • The Netherlands • Poland • Portugal

European Consumers Seeking Health and Pharmaceutical Information

How Technology and Evolving Media Choices Are Shifting the Landscape



an eyeforpharma partner benefit

manhattanRESEARCH

Cybercitizen® Health Europe White Paper

Copyright © 2007 • Manhattan Research, LLC

All Rights Reserved

Introduction

European consumers have been a long-neglected piece of the strategic puzzle for most marketers at health and pharmaceutical companies. Yet signs increasingly point to the degree to which European consumers are, in fact, researching health information and treatment options, and ultimately taking action as a result of those information searches.

Consumers in Europe are renowned for being extremely technologically advanced in terms of online activities and technology and device ownership. But due to the lack of direct-to-consumer advertising for pharmaceuticals, many pharmaceutical companies have assumed that consumers were somewhat passive participants in the patient-physician relationship. However, according to a recent study by Manhattan Research, European consumers are more likely to have researched health information online than they are to have participated in online dating, online gaming or even online bill pay.

Given the propensity of European consumers to use the Internet for health and pharmaceutical information, Manhattan Research has outlined three key trends in the market that every health and pharmaceutical market must be aware of and plan for today.



European Consumers Are Researching Health and Pharmaceutical Information to Make Decisions

Although consumers in Europe are less likely than consumers in the United States to research pharmaceutical information online, in part due to the lack of pharmaceutical advertising in Europe, fully one-third of online consumers in Europe research pharmaceuticals online today. Such information is clearly having an impact; nearly 80% of these consumers go on to take some sort of action as a result of their information searches — more on that in trend number three. The numbers illustrate a market that has embraced the Internet as not only a source of content and entertainment, but as a robust resource to evaluate health and wellness, symptoms, treatment options, and specifically what pharmaceuticals may or may not be available in the market today. The market has spoken and is saying loudly and clearly that the Internet now rivals “traditional” mass media as a health information resource.

Furthermore, in the absence of direct-to-consumer advertising, or local product.com destinations for European consumers, consumers are actually going to the corporate sites of pharmaceutical companies for health and pharmaceutical information. In fact, an estimated 21 million consumers report visiting corporate sites in the past 12 months across the 10 countries surveyed in the research. Pfizer, Bayer and GSK are the top three corporate sites visited by consumers for information, with such visitors reporting to access these sites for health and treatment information specifically. Companies would be wise to heed this trend, and provide patient-friendly disease education content in the local language on the local portal for the company — a feature that would be a benefit to patients and physicians alike. Perhaps of no surprise is that there is also a segment of consumers in Europe that have taken the initiative to “cross the pond” to the United States content sites for pharmaceutical information — where branded websites provide detailed information about branded products. Of course, the only

143 million
adults online for health info



62.6 million
adults online for pharmaceutical info



Among adult consumers in the 10 countries surveyed: Germany, United Kingdom, Spain, Italy, France, Belgium, Sweden, Poland, Netherlands and Portugal

catch is that these are typically only available in English – suitable for the UK resident but a challenge for other markets.

Plus it is not just pharmaceutical information European consumers are after today. Consumers are also researching a wide range of diseases online. As evidenced by the chart below, in addition to conditions with high incidence rates (such as allergies), consumers are actively seeking information about depression and targeted topics such as cancer, which has a relatively low population of patients compared to the population seeking information online – speaking to the power of those beyond the patient to access information.



Consumers in Europe Are Using Search Engines and Local Content Sites to Gather Information Online

When it comes to where European consumers are going to gather health information online, one trend is evident: the content must be local. Not surprisingly, language plays a major role in driving consumers to sites and content within their local market – also making a pan-European site difficult to achieve.

Within each of the ten countries, specific sites with local content emerged as the leaders for content – with one surprising site mentioned across a number of the ten countries surveyed: Wikipedia. In the absence of major health portals with accredited content in many of the countries surveyed, consumers are turning to sites such as Wikipedia as a local content source with up-to-date

information. Companies would be wise to ensure their products are adequately represented within Wikipedia entries across the various countries, and to also survey the entries for treatment of certain conditions to certify the available options are presented accurately and completely. Of course, as some companies have learned, be vigilant in how you approach editing or altering Wikipedia content online. Making sure content is complete is one thing; selective removal of content is clearly another.



Health Information Accessed Online Ultimately Drives Behaviour Offline

All of this information about how consumers are using health information and technology would be pointless if there was not some way to connect it back to actions taken in the offline world. After all, the point of education, and far-reaching awareness campaigns, is to get consumers to take action in some way – be it, to talk to a physician, discuss possible symptoms with friends or family, or let others know about their experience. Given the next wave of community and user-generated content online, empowered and engaged consumers are talking about treatment options that have worked for them – for the benefit of the experience of others in the same situation.

Knowing that almost 150 million European consumers in the ten countries studied in this research have accessed health information online is one thing, realising that almost 100 million report they are talking about such information with friends and family, and almost 50 million are talking with their personal physician as a result is clearly another. What other channel is driving almost 50 million consumers to initiate a conversation with their physician today? Although traditional mass media (print, radio, TV) is clearly driving large audiences, the strategic value of the online channel in Europe is clear – the audience is there and waiting.

In Conclusion

So what does all of this mean for pharmaceutical marketers? In the absence of DTC campaigns to educate consumers about treatment options available to them, it is critical that marketers understand where European consumers go to gather healthcare information both online and offline (various types of sources were tracked in the research), and provide them with the tools and content needed to empower these consumers to make informed requests and decisions.

The options available to companies for engaging consumers are most compelling in the online world, where consumers are already actively seeking information from a variety of sources. Being aware of these sources, and the impact they are having on the types of conversations consumers ultimately have with their physicians, is critical for companies to understand and incorporate in order to keep pace with today's empowered European consumer.

Cybercitizen® Health Europe

Cybercitizen® Health Europe is a syndicated multi-client study and advisory service focused on key research topics and trends impacting the European consumer health marketplace. The study objectives are to identify and analyse the behaviour, attitudes and demographics of the consumer population who use technology and the Internet for health purposes, as well as further segmenting the population by therapeutic area, technology utilisation, and motivation. In addition to access to the core data, clients also have access to the Manhattan Research analyst team and have the ability to create custom segmentations and data cuts upon request.

The Cybercitizen® Health Europe study was conducted in Q2 2007 among 4,302 online European consumers in the United Kingdom, Germany, Spain, Italy, France, Belgium, Sweden, the Netherlands, Poland, and Portugal.

For more information...

W www.manhattanresearch.com/CCHEU.aspx
T +1.212.255.7775
E sales@manhattanresearch.com

