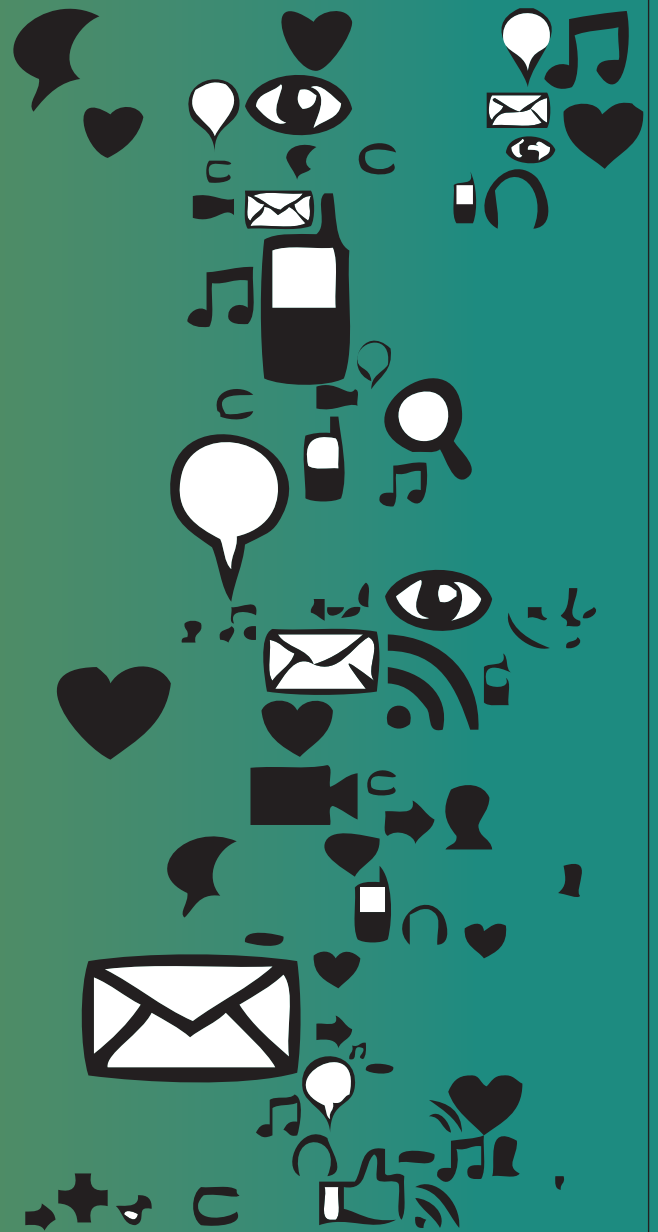


MEDIA USAGE BY PHYSICIANS IN INDIA

Insights on Physicians Use of Emerging Media in Indian Market



A Report by Brandcare
July 2012



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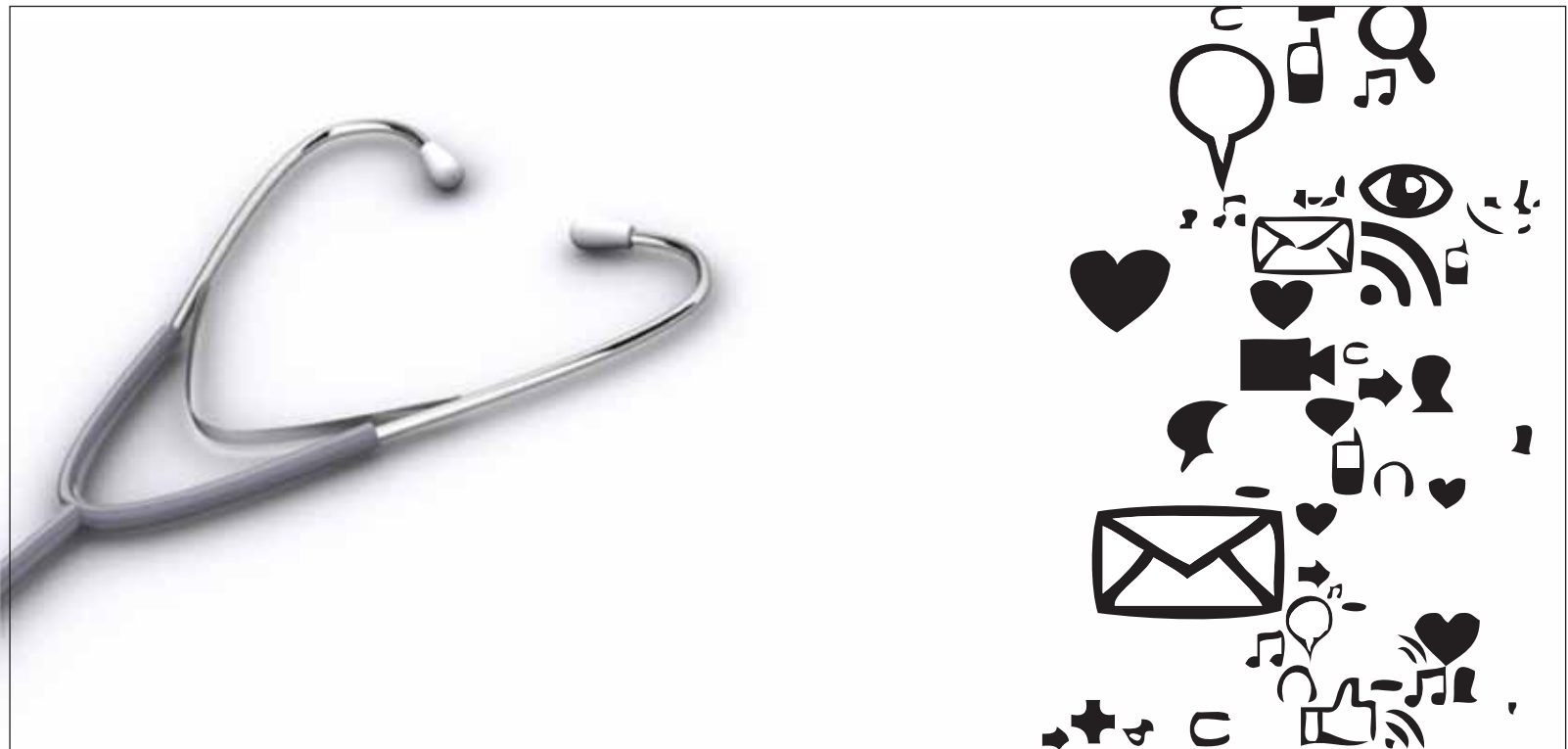
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Foreword

Marketing to physicians online is an essential part of today's marketing mix. The web has become a powerful force for raising awareness, providing information, influencing purchase behaviour and creating support for sales teams.

World over it is becoming critical that pharmaceutical brands who want to market to physicians online use the web effectively in their marketing mix.

Marketing to physicians online can give you an edge over many aspects of the marketing mix, from sparking discussion and building brand image to driving sales leads and supporting customer service.

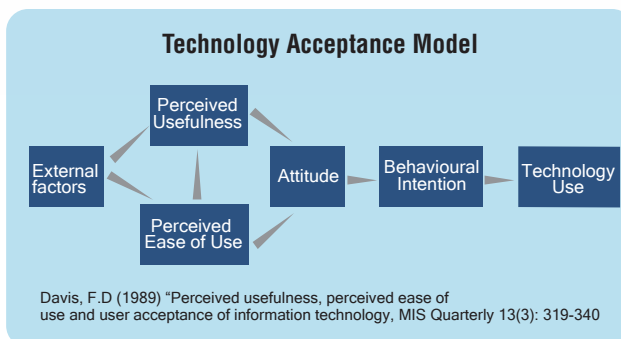
The pharmaceutical industry is simply a reflection of the wide sea change. The change is evident. However, most pharma brands have not been agile enough to encash on

this due to uncertainties in the regulatory environment in India. The same however isn't true about their customers.

Patients all over the world have found the web so essential that they are as likely to Google up their symptoms as they are to ask a pharmacist.

In a world where patients turn to Google rather than their pharmacist, analysing physicians media behaviour is important.

However, as suggested by Davis, technology follows its own algorithm of acceptance.



Executive Summary



When the demographic and professional characteristics of internet savvy Indian physicians were investigated, it was found that the adaptability to internet is increasing consistently in tandem with general public. Physicians are using internet, social networking websites, email to communicate with peers, patients and thought leaders.

Reported technology use by physicians ranged from 90% using the web, 37% using a portable device to access the internet to 10% writing a blog. Physician's specialty, practice setting, years in practice, average number of patients treated per week and number of physicians in practice were found to be inconsistently associated or unassociated with use of the technologies examined. Demographic characteristics, rather than practice-related characteristics, were more consistent predictors. It was found that males in the age group of 18-30 and having teaching hospital privileges were using internet more as compare to other categories.

The media usage of the physicians like any other professional is divided into personal and professional usage. While the personal usage is for connecting, entertainment and aiding buying decisions, professional usage spans learning, networking,

practice enhancement and self promotion.

The media can also be divided into two groups - regular media for consumers at large and customized media for physicians. While on regular media physician seeks satisfaction of his consumer needs like any other non-medico consumer, on a customized media his professional needs can be captured. It depends on marketers to appeal to either.

The content on conventional as well as emerging media is in text, audio, visual format. The content could be syndicated or real time depending on what they are providing. There are also opportunities to connect with peers, subordinates, opinion leaders and institutions. Few medical bodies are also working in their individual spheres to develop customized content.

There is a distinct demarcation between different media as well as within the media with regards to providing quality content.

The choice of the media depends on the programs and engagement initiatives, their formats and the newness of content.

Traditional media content is converted

to digital format, and is available for users online. New media pose a serious threat to the future of traditional media; because it is likely that new media popularity and acceptance can very much kill the time spent by users on traditional media. The rise of internet as a medium has made information easily accessible. This surge of new media channels is making the traditional media (especially Sales Rep) less attractive or less beneficial as a potential knowledge source. The Sales Rep is seen as a means of regular information update or brand reminder and not as a knowledge source by physicians. The new media might encourage e-detailing in long-run, as multinationals and large Indian pharmaceuticals firms are already emphasizing on digitalizing content to interact with physicians. Parallel movements of personalized medicine and rapid learning healthcare systems may not flourish if we fail to establish a culture of using various social media for learning.

“ Everything's been done, it's only the combinations that change. The combinations are changing alright. Change the combination, change the medium, change the culture even, and you change everything. ”

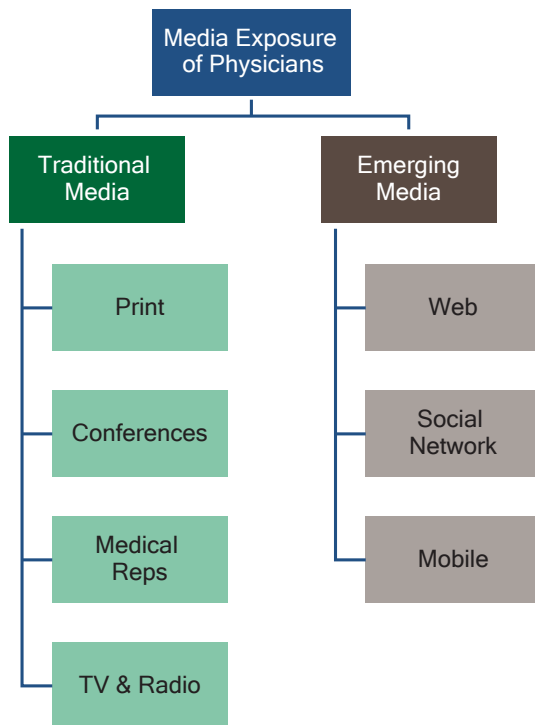
- T. S. Elliot

Findings

Background

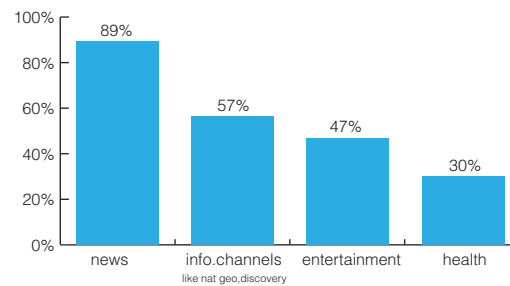
The age-old question “What’s the best way to reach physicians with marketing messages?” has become even more complicated. Because of the continuous onslaught of information that physicians are exposed to, it has never been more challenging to get physicians to read, remember who said what, and respond. In the wake of this it is important to understand the media engagement of physicians today.

Brandcare research team conducted a study to know more about Indian physicians’ media usage behaviour. Physicians included in the survey were split equally between primary care physicians and specialists.



“Majority of physicians use TV for news updates followed by entertainment. Very few view health channels or health content-based programs.”

Television



Television viewership with healthcare physicians like any other consumer is almost 100%. Majority of them use TV for news updates followed by entertainment. Very few view health channels or health content-based programs. About 14% remember watching “Hello Doctor” a health-based program on a regional Marathi channel. The quality of the health programs is an issue with the physicians today. Improved content will see better engagement and may become an important media for pharmaceutical companies tomorrow at least for Over The Counter (OTC) products.

The conventional print media (textbooks, journals etc.) is still the most trusted source for physicians. 20% read health-based magazines regularly e.g. Health Express.

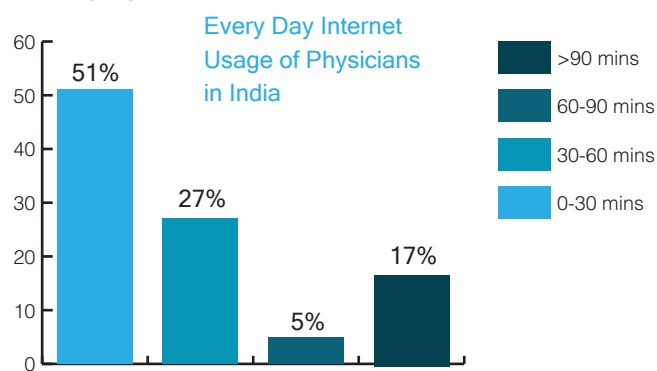
Internet

Each day, the numbers of online medicine-related documents are growing, and they can be accessed and shared via internet. This powerful free-flow of information holds the promise of improving standard of care in many ways. Physicians are relying more on the internet today than ever before. The number echoes other research surveys conducted, suggesting heavy internet usage among physicians for both personal and professional use. They believe that the online content has improved drastically over past four to five years, increasing their dependency on internet as a credible media for information, surpassing conventional print and personal rep visits.

90% of them who use internet has given rating of 4/5 for quality of information available online and 3.5/5 for internet making their practice easier. Physicians want to be aware of treatments and techniques to remain competitive as well as to treat patients effectively. They agree that internet is fast means of acquiring knowledge as compared to traditional sources. The major challenge for Physicians to use internet includes lack of time and inadequate training. Further challenges include available IT infrastructure such as slow Internet speed. Amongst physicians who don't use internet, 70% agree that training can help them improve their ability to use internet.

1. Usage Pattern

1a. Everyday usage

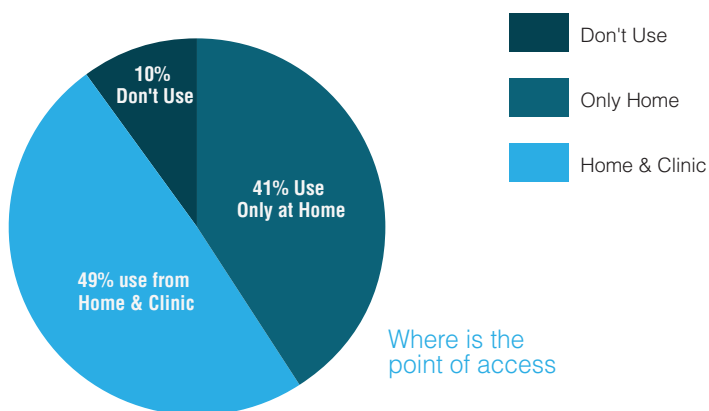


Internet has penetrated deep into Indian psyche and our physicians are no exception. 95% of 3rd generation physicians (below 40 yrs of age), 86% of 2nd generation physicians (40-55 yrs of age), 70% of 1st generation physicians (> 55 yrs of age) use internet everyday. The internet usage among Indian physicians is still not 100% as compared to the developed nations.

However, those that are using have quickly explored devices other than desktop computers for accessing internet. Study shows that 53% use only desktop, while 37% users use combination of devices.

“90% of Physicians are using internet. 74% of them are using internet every day”

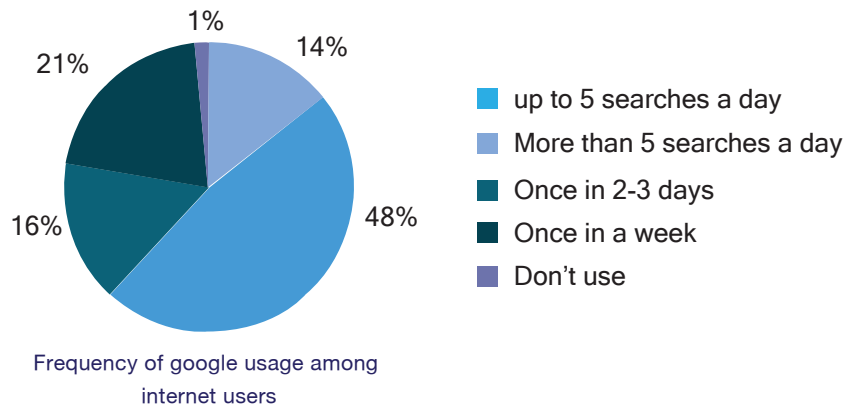
1b. Point of access



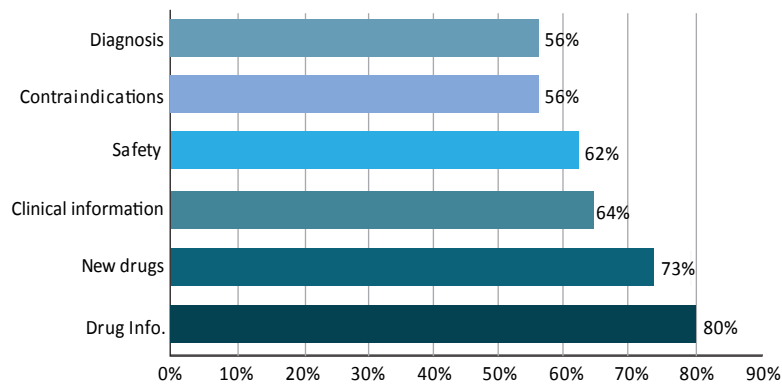
Though the usage of internet among Indian physicians is nearly 100%, only 49% use it in their clinic, restricting professional usage. Those who are using internet in clinic, also extensively use the Internet during the patient consultation process. The reasons for such small percentage of physicians using internet in clinic could be lack of device, connectivity or easy of use. Improved connectivity solutions can drastically improve in-clinic usage. When asked almost all said that they would use in-clinic if devices and connections were easy to get by.

“49% of Physicians use internet in clinic, very low as compared to the penetration of internet among Physicians”

1c. What physicians are searching professionally



Google is the first port of call for information seeking, also it saves the hassle of remembering individual sites. Around 90% of the physicians begin their search with google. The most often searched topics are:



80%
search for
specific
drug information

73%
search for
new medications
and treatments

64%
search for
clinical
information

Physicians have poor recall of websites they have visited. However, probing revealed some of the commonly browsed sites are:

- <http://www.ncbi.nlm.nih.gov/pubmed/>
- <http://www.medscape.com/>
- <http://mednews.com/>
- <http://www.rxpgonline.com/>
- <http://www.websurg.com/>
- <http://www.epocrates.com>

2. Mobile Internet

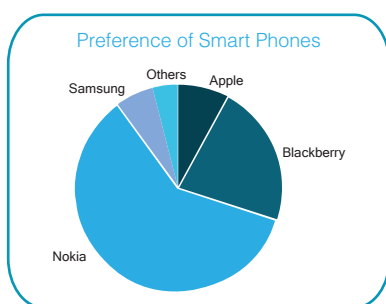
Booming internet is a cacoon in the minds of Indian physicians and soon this cacoon will burst open to become viral. With the advent of technology more and more people are becoming tech-savvy. Technology is traversing the age barrier slowly and steadily.

Gone are the days when people use to find a desktop so that they can access internet. Technological development has made it possible to access internet while on the go either through laptop or mobile. Our research indicate that 72 % of the physicians own internet-enabled phones. About have internet-enabled

phones other than smart phones. Usage of Tab is very low as compared to mobile but at surge. 3% of the physicians are found to be using Tab for professional purpose. Breach Candy hospital has gone a step ahead and now performs a revolutionary surgery using an iPad where the surgeon is reading the data on the iPad's high-resolution screen, to accurately cut the bone to place the new joint. Physicians rapid embrace of mobile devices have caught the eye of many involved in healthcare information technology business.

“With the advent of technology more and more people are becoming tech-savvy. 30% of Physicians own smart phones and are savvy of internet usage on their mobile devices.”

2a. Use of smart phones

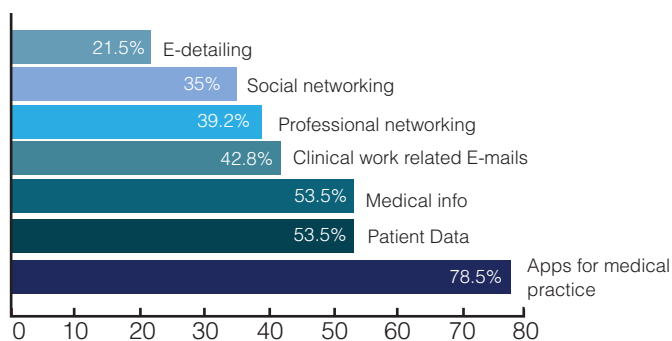


Research indicated that 30% of physicians own smart phones and are savvy of internet usage on their mobile devices. Hospitals are currently engaging physicians through

mobile networks. Max Healthcare started Blackberry applications (apps) such as: cloud-based solution 'MphRx Connect' which securely connects an archive of radiology images, lab reports and other patient information with smart phones. Blackberry has developed an apps "Telemedicine" which helps physicians to check ECG. e-Traq helps physicians monitor patients on BlackBerry tablets. "Skeletal System" is the similar apps from i-Phone.

Our research shows that the average time spent on mobile internet by physicians is around 0-30 minutes out of which most of the time is spent for professional use. 15% of physicians not having desktop in clinic are using internet on mobile. Few physicians who have internet connection in their personal clinic access internet on mobile while on the move or while visiting polyclinics or hospital without such facility. Around 58% physicians will prefer to use daily medical information on mobile over desktop. About 15.46% of physicians using medical tools / apps like skyscape, BMI calculator, medical dictionary etc. If that was not enough some of the physicians are also found to be using data management systems like EMR(electronic medical records). This clearly shows that the use of mobile specially mobile apps is on the rise among physicians

2b. Anticipated use of mobile internet-based services in future



In the coming age mobile will be the center touch-point. Smart phones allow mobility to the user which desktop don't adding to this is the increased focus of interface builder on mobile telephony. Mobile interface builders have been busy making mobile telephony more and more user friendly and multi-purpose. Anticipated use of mobile internet-based services will be dominated by apps for medical practice, patient data and medical information. We observed that 78% of Indian physicians said that they are interested in using mobile apps in day to day medical practice.

3. Current Trends in Usage of Social Media

Do you have Facebook Account?

35% YES

65% NO

Do you use You Tube?

12%
YES

88% NO

Nearly 35% of physicians acknowledged that they have a Facebook account and are on it at least weekly. While those using Twitter, LinkedIn or any other social networking sites were far less in number. Few physicians are also part of medical group and forums on facebook and share videos on healthcare topics on facebook or You-tube. It has also helped them in growing their network with other physicians.

4. Application of the Web from a Physician's Perspective

Internet as a media holds enormous possibilities and advantages over conventional media. Due to newer platform, apps and technology developments; several patient, treatment, disease management tools are available to improve practice efficiencies. Physicians and patients interaction is increasing online. Hence there is growing need for accessing information

On the flip side, almost all survey respondents had used Google to look for information related to their professional needs.

The use of popular networking sites like Facebook and LinkedIn for professional connections is not just a metro phenomenon. There are nearly 1000 members in regional community such as "Doctors in Jaipur" and associations group such as "Indian Medical Students Association" on facebook. Few active groups representing some associations are All India Medical Association, Family Physicians Group, Youth Doctors Association.

- ▶ to update one's own knowledge
- ▶ knowledge to satisfy patients on treatment options as they are making more informed decisions
- ▶ sharing of clinical challenges and success is magnified multi-fold across boundaries

Web2.0, Social Media and Unified Communication technologies is changing the way people seek information can engage in real-time opinion sharing.

Conclusion

Use of conventional media for reaching physicians has been racing to the point of saturation. Availability of media channels choices has led to an uneven distribution of time spent. To engage physicians healthcare companies may need to look at the emerging media.

Emerging media holds a promising future considering the ease of access, ease of usage and an overall momentum in its favour which may be difficult to resist.

E-detailing, online CMEs, interactive digital content, online therapy repositories are expected to grow. The use of conventional media may undergo a metamorphosis to leverage its unequivocal power of persuasion.

As we see today, there are some neat benefits that emerging media may have to offer:

- Cost efficiencies
- Consistencies of communication - may be able to override the distortion quotient of personal medium
- Customisation
- Ease of access
- Non-interruptive
- Better control and monitoring

On the flip side, some of the physicians' concerns that may need to be addressed are:

- Reliability of data
- Relative reluctance of the very senior medical fraternity to adapt to changing technology
- Security concerns
- Concerns of overfamiliarity of patients
- Uncertain regulatory framework for physicians as well as the pharmaceutical industry.

After decades of conventional marketing, these are times of change and adaptation. It will be interesting to see how branding teams incorporate the new media as a part of their marketing and media mix. There are no set rules, no robust trends and matrices to follow. So here on whoever initiates will be setting a path for others to follow. So go ahead and bend the trend !



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