

eHealthInsight Series

Patients as Consumers

Understanding the Increasing Consumer Level of Influence in Healthcare

Reference Code: BFHC0729

Publication Date: August 2006

DATAMONITOR VIEW

CATALYST

Patients as Consumers: Understanding the Increasing Consumer Level of Influence in Healthcare focuses on how the Internet is changing the role of consumers within the pharmaceutical markets in the US, Western Europe and Japan

SUMMARY

The Internet is dramatically impacting the role of consumers in healthcare and the pharmaceutical market. Prior to the Internet, if a consumer wanted to access information on a particular disease or medication they would have to rely on information provided by their physician, pharmacist, friends and family, or resource materials found at the library. Consumers still rely heavily on the aforementioned sources of information; however they are also more likely to double- and triple-check information gained from traditional resources with information they have found online using search engines and a variety of websites.

METHODOLOGY

**Datamonitor's eHealth
Consumer Insight Surveys**

Detailed surveys were conducted covering consumers' opinions of key eHealth initiatives in the US, Western Europe and Japan.

**Datamonitor's eHealth Physician
Insight Surveys**

Detailed surveys were conducted covering physicians' opinions of key eHealth initiatives in the US, Western Europe and Japan.

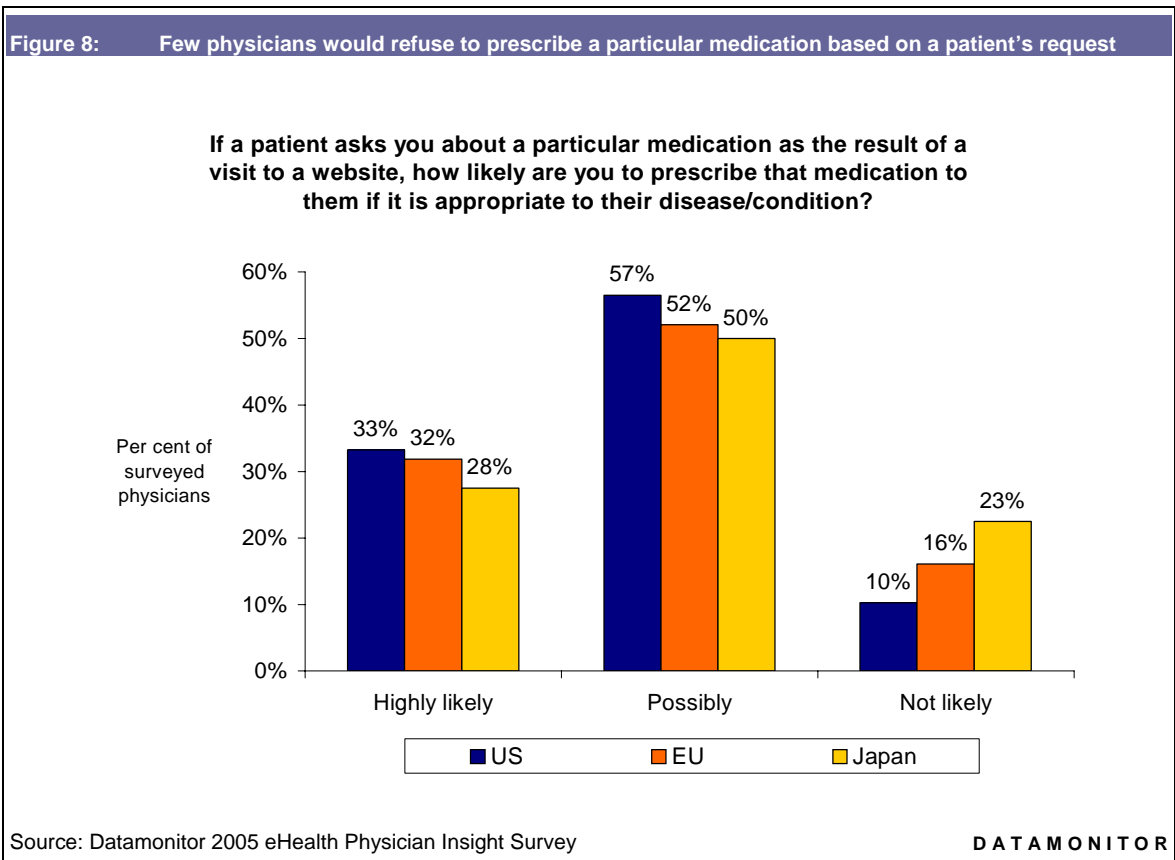
For more information...

tel: +877/437-4276 fax: +781/639-0179 email: epharm@hcpro.com

Datamonitor finds that 33% of surveyed physicians in the US, 32% of physicians in Western Europe and 28% of physicians in Japan are *highly likely* to prescribe a medication based on a patients' request if the drug was appropriate to their disease/condition (Figure 8).

Patients are actively requesting specific medications from their doctors. This behavior is observed even in countries where direct-to-consumer advertising of branded drugs is illegal in part due to the global nature of the Internet, which allows individuals from more restrictive markets to access sites intended for US audience.

Datamonitor's survey results show that 24% of respondents from Western Europe and 10% of respondents from Japan use websites directed towards US audiences when searching for health information online (data not shown).



A changing relationship: consumers and other consumers

Online forums are gaining ground as a key channel of influence on pharmaceutical consumers

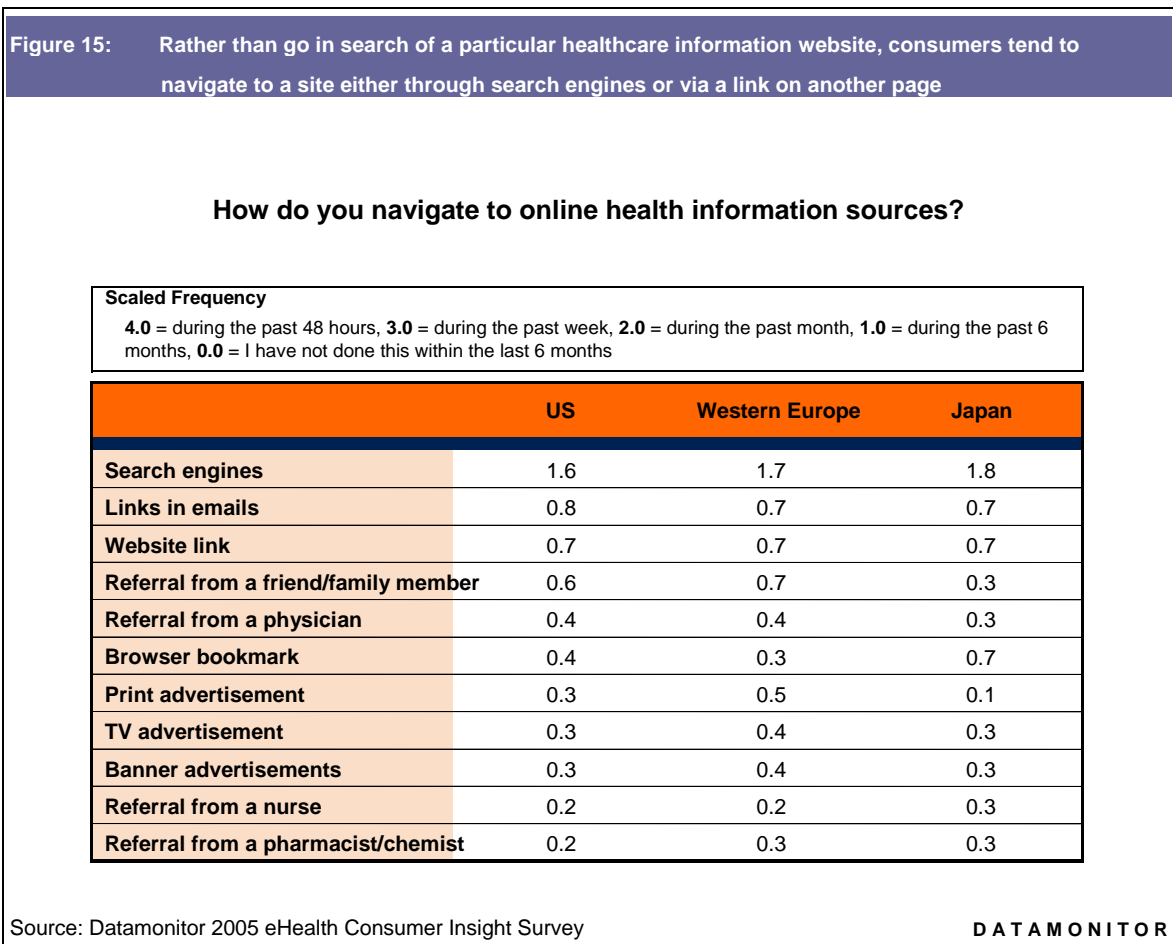
While the original intention of the Internet was for people who were located significant distances from each other to quickly and easily share data, it seems unlikely that even these early Internet pioneers fully grasped how much this medium of communication would impact human behavior.

For more information...

tel: +877/437-4276 fax: +781/639-0179 email: epharm@hcpro.com

To better steer consumers towards specific online properties Datamonitor recommends an integrated multi-channel approach, including but not necessarily limited to:

- search engine optimization;
- email campaigns;
- television and radio advertisements;
- print advertisements;
- links from other well-trafficked online properties
- physicians' recommendations.



Search engine optimization

It is difficult to emphasize enough how critical a factor search engine optimization is for a product. The importance of optimizing webpages, particularly for highly utilized search engines such as Google, is highlighted in the following example.

For more information...

tel: +877/437-4276 fax: +781/639-0179 email: epharm@hcpro.com