

“育デジ (*Iku-Digi*)”

Promoting further evolution of digital promotion

Abstract

Digital promotion has established its presence and become a commodity in the pharmaceutical industry. In the last few years, use of digital channels to access healthcare professionals (HCPs) has rapidly increased, including websites dedicated to HCPs, web conferences, smartphone applications, and third-party promotional services. Simultaneously, digital content for MRs to enhance impact of detailing has been enriched.

As a result of pharmaceutical companies' scrambling to the digital approach, an overabundance of content has been delivered to users, HCPs and MRs, beyond their capacity to digest and make use of. Even the individuals in charge of digital promotion are often unaware how their contents are actually used or how users value them. Although digital promotion is considered more cost-effective than other forms of promotion, the current situation may actually result in inefficient use of promotional budget.

This paper discusses “育デジ (*Iku-Digi*)”, how to promote further evolution of digital promotion by ensuring that it meets users' interests and needs.



Development phase of digital promotion

Digitalization of commercial and information transactions began in earnest around the year 2000. Starting with the launches of Rakuten (1997) and Amazon in Japan (2000), a number of major e-commerce websites were launched. Consumers became familiar with such websites and digital is now a common channel by which to gather information and purchase services / products.

Lagging several years behind consumer business, pharmaceutical companies gradually adopted digitalization of information. While websites for healthcare professionals (HCPs) were very simple in the beginning, containing minimal information, the contents have been expanded over time. Now companies are competing in offering unique services, such as e-learning programs, in addition to scientific information on their products. Information customized for each individual HCP is also available through membership websites (Table 1).

Promotional activities via third party platforms have also spread since around 2005, including banners on medical information websites, e-detailing and enabling HCPs to reach MRs via online drug bulletin boards.

Digitalization in MR promotion has also rapidly evolved. Although there were questions about need for iPads when they were first rolled out to MRs around 2010, the iPad has become a standard promotional tool accepted by HCPs. Many contents that are intuitive and attractive have become available, such as 3-D contents and personalized detailing stories for each HCP, making use of tablet PCs' capabilities.

As such, digital has evidently established its position as a new promotional channel even though the pharmaceutical industry was skeptical about it until just a few years ago. To proceed to the next phase, cost-effectiveness of digital promotion must be improved, and allocation of promotional channels based on individual HCPs' preferences must be optimized.

Table 1: Example developments in websites for HCPs

Month / Year	Event
June 2008	GSK: Launched a website on cervical cancer for HCPs, which provides information on the latest scientific articles, and diagnosis / treatment tips with graphics and videos
April 2010	Bayer: Launched a website for HCPs containing disease information for over 600 dermatology conditions with more than 6,500 images
September 2010	Ono: Revamped corporate website with enriched information and FAQs for HCPs
October 2010	Teijin Pharma: Launched membership website that offers integrated information on hyperuricemia, such as epidemiology, pathology, treatments and relationships with life-style diseases
February 2011	Pfizer: Added new contents to membership website that allows HCPs to view full articles published on NEJM*
December 2013	Pfizer: Added new functionality to membership website that allows HCPs to set up a call with a specialty MR, and receive required information online
February 2014	AstraZeneca: Fully revamped membership website for HCPs, adding a function to select best information for individual users based on analysis of member information linked with access logs

Source: Nikkan Yakugyo, *The New England Journal of Medicine

Challenges in reaching the next phase

Many pharmaceutical companies now recognize the necessity of performance evaluation of digital promotion and are searching for the appropriate approach.

Some companies have already developed IT infrastructure to track access automatically for real-time analysis. However, they have not yet made practical use of this information. Despite this situation, we have seen companies that launch brand-new contents while they have not assessed prior content released just six months ago, since they fear falling behind the rapidly changing digital trends.

Even companies assessing ROI of digital promotion as a whole often fail to evaluate individual pieces of digital content or apply the results to future digital promotion materials and/or MRs' use of the contents.

For example, looking at smart phone apps developed by pharmaceutical companies, Deloitte's periodic survey on apps (Figure 2) revealed that the majority of apps are for patient

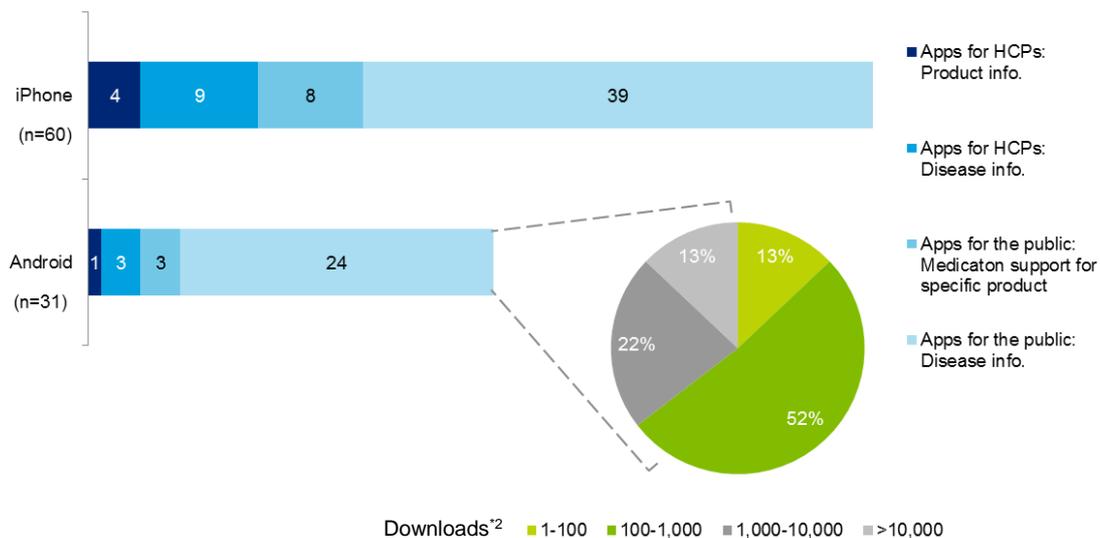
support. However, the number of downloads indicates that not many of them are being used. Pharmaceutical companies must review if those apps were properly designed to address the market demands.

We have seen situations where digital contents for MRs were seldom used and remained untouched. In such a situation, it is necessary to assess why the MRs are not making use of the digital contents being provided, and then make the necessary modifications or adjustments.

Before assessing cost-effectiveness, a scheme to monitor the current situation should be built. If there are contents which are not being used, the reasons (e.g. lack of recognition from users, poor contents and/or unclear purpose) should be identified as well.

It should be noted that we have observed the same problem in other industries, with companies unleashing an abundance of digital content without assessing the efficacy of any particular piece, rather than continuously updating and improving existing digital content.

Figure 2: Number of apps*1 and downloads by type*2



Source: Deloitte survey, as of June 2014

Note: *1: The survey covers top 40 pharmaceutical companies in Japan (revenue basis)

*2: Number of downloads is only available for android applications

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What should pharmaceutical companies do next in digital promotion? It is obviously important to keep providing new contents in order to impress customers. Since generating brand-new content is a risky task due to underlying uncertainty in audience reception, initiatives to identify existing contents with great potential and to promote their further evolution should proceed in parallel.

The advantage of existing contents is they can be analyzed objectively based on frequency of use and/or access. This allows pharmaceutical companies to continue to update and maintain only popular pieces of digital content, while discontinuing others, in order to resolve the current situation in which users are confused by overabundance of digital content and to reduce unnecessary maintenance costs.

From the perspective of brand recognition, it is more cost-effective to maintain one single set of content continuously rather than to keep delivering different content. Obviously, the cost of revising existing contents is relatively lower than developing new contents from scratch.

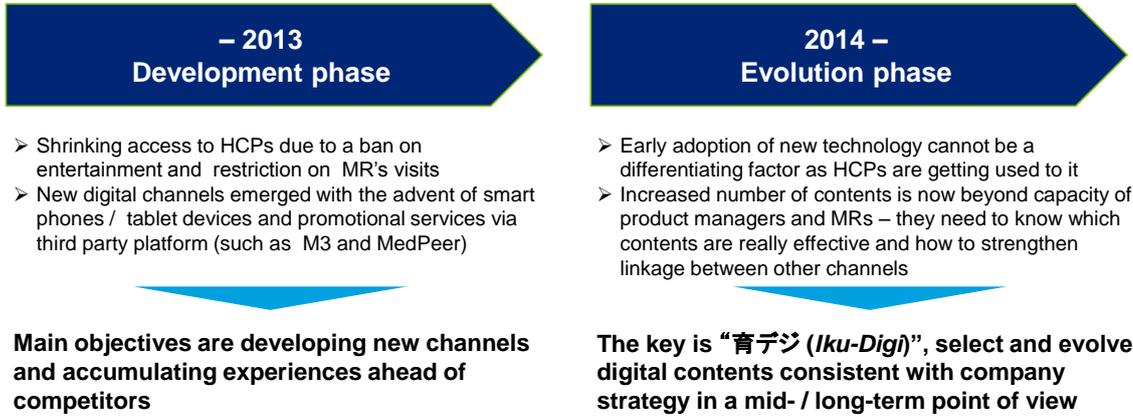
The below describes steps required to promote further evolution of digital promotion. Please confirm what your company has already done and where it might need to focus in the future:

■ Build a platform

- Assign an individual responsible for assessment and maintenance of digital promotion
- Manage digital pipeline in an integrated manner (type / volume of digital content, development / launch schedule, etc.)

- Qualitatively and quantitatively evaluate digital contents based on usage (access and frequency of use), external reports, internal surveys and customer feedback
- Select assets to further develop
 - Define selection criteria based on company situation (consistency with strategies, usage level, feedback from MRs, etc.) and assess each piece of content
 - Designate contents to further develop based on the above criteria and discuss revision or discontinuation for the others. Discontinuation criteria should be clarified in the planning phase of content.
- Establish a scheme to enable sustainable evolution
 - Develop plans to improve internal and external awareness for digital contents to be further developed
 - Define KPIs and monitoring cycle to streamline monitoring process for digital promotion (while real-time monitoring is ideal, weekly or monthly basis is sufficient as well)
 - Create rules to maintain digital contents based on monitoring results
 - Continue to evaluate, update and select digital contents for further development

Figure 3: Heading to the era of evolution



Conclusion

Digital promotion has rapidly established its presence in the pharmaceutical industry and will be an even more important channel along with the increased importance of transparency and tightened restriction on MR visits to HCPs.

However, as a result of scrambling to the digital approach, users have been overwhelmed by an overabundance of content and the volume of content has expanded beyond the company's ability to control.

The fast adoption of digital promotion has been a key to success to impress customers with unique and differentiated contents. However, the novelty of the new channel is wearing off.

Looking towards the next phase of digital promotion, it is important to evaluate digital contents based on objective analysis of users' acceptance. This scheme will enable pharmaceutical companies to improve existing digital assets and realize competitive and value-added digital promotion suited to the needs of each company.



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- Realize data interaction / integration between multiple systems with semantic



Supports business decision making through data analysis from various aspects. Based on internally accumulated big data, helps to clarify corporate strategies and improve performance.



- Identify spatial / temporal characteristics to internal data that is no more than a series of figures, to make it usable for decision making
- Periodic reporting on results of analysis

Deloitte Digital provides one-stop service achieving business innovation with digital technology and creativity combined with Deloitte's business knowledge, from digital strategy development based on company strategies, design / development of mobile applications / website UX to implementation of global CMS / e-commerce.

Contacts

Jun Matsuo

Partner
Life Science & Health Care Unit Leader
Deloitte Tohmatsu Consulting Co., Ltd.
+81 80 2003 8644
jmatsuo@tohatsu.co.jp

Wataru Hamaguchi

Manager
Life Sciences & Health Care
Deloitte Tohmatsu Consulting Co., Ltd.
+81 80 4359 5707
whamaguchi@tohatsu.co.jp

Christian Boettcher

Director
Life Sciences & Health Care
Deloitte Tohmatsu Consulting Co., Ltd.
+81 80 9097 7376
chrboettcher@tohatsu.co.jp

Mitsuhiro Itakura

Consultant
Life Sciences & Health Care
Deloitte Tohmatsu Consulting Co., Ltd.
+81 80 4424 7806
miitakura@tohatsu.co.jp

Goro Nishimoto

Partner
Life Sciences & Health Care
Deloitte Tohmatsu Consulting Co., Ltd.
+81 80 4367 7858
gnishimoto@tohatsu.co.jp

Ryota Nakamura

Consultant
Life Sciences & Health Care
Deloitte Tohmatsu Consulting Co., Ltd.
+81 80 4362 3495
rnakamura@tohatsu.co.jp

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