Ten years ago, a patient had to wait to visit a physician before getting a diagnosis. Now, a patient has a universe of healthcare, medical, and pharmaceutical information no further away than his or her smartphone, tablet, or laptop. A few clicks provide almost instantaneous results from a myriad of sources around the world—a type of “e-mmediacy” that was unheard of just a few years ago. Welcome to the era of the empowered “e-patient.”

Thanks to the vast amount of information online, patients are now more educated, more communicative, and more socially active within the health and pharmaceutical space than ever before. They often research their symptoms and potential conditions online long before they set foot in the physician’s office, making them smarter and more educated about their potential illnesses. Often communicating socially via online patient community forums, these e-patients are researching drug reviews, testimonials, and more. Sharing personal experiences with others via this digital form of word of mouth is now commonplace.

Meanwhile, healthcare professionals (HCPs) must interact with, evaluate, and diagnose this new breed of patient face-to-face to the best of their ability. Up to 53% of patients said they have talked with an HCP about information they first researched online. The rise of the e-patient has changed the way they interact with physicians, healthcare organizations, pharmaceutical drug companies, and even other patients. For healthcare and pharma companies to capitalize on this phenomenon, they must be knowledgeable and adjust their messaging strategies accordingly.
E-PATIENTS AND MOBILE DEVICES GO HAND IN HAND

Mobile device usage is at an all-time high. According to MedThink Communications’ internal client data, smartphones, tablets, and other mobile devices accounted for approximately 40% to 50% of pharma and healthcare website traffic in 2015. Because of the sheer number of visits via mobile devices, mobile-responsive websites are essential in moving into the multi-screen and multi-device age of marketing. Mobile-responsive design simply means ensuring that users have a very consistent experience regardless of which device they use to access a website. Unfortunately for patients, 67% of pharmaceutical websites are still not fully mobile-responsive. This gap between experience, expectation and reality is becoming increasingly important as more patients and physicians access Web information from non-desktop devices.

THE SELF-EDUCATING AND SELF-DIAGNOSING E-PATIENT

“You have an amazing tool at your fingertips right now. You can do the same research that your physician can. You can search medical journals or look up information on websites from trusted individuals and institutions. You can scroll to the top of a page, enter your query into the search box and click ‘search.’”

- Ulcerative colitis patient

From initial symptom research, to information about specific disease states or conditions, to branded treatment options and reviews, everything a patient wants to know is available online. Authoritative websites such as MayoClinic.org and WebMD.com often replace doctors as the first line of patient research. In fact, 72% of all Internet users said they have used online search to look for health-related information within the past year.

Seeking medical information online may not always result in an accurate health assessment, but 67% of US adults claimed that doing so has made them better informed as patients. And that belief means they will very likely continue to research online. What does this mean for pharmaceutical and healthcare companies trying to reach out to patients?

It means that e-patient education and engagement is crucial. Patient education information and resources for disease states, conditions, and branded medication/device-treatment options must be widely available, easily accessible, and truly transparent for the patient. Historically, many pharmaceutical and healthcare companies have relied on physicians and other offline sources to educate their brands’ consumers. However, with today’s eager-to-learn e-patients, direct access to educational materials that address their concerns is critical.
Patient-focused brand advertising also plays an important role in education and awareness. From traditional television ads to online banner ads and paid-search advertisements, these various channels work together to help raise brand awareness within the patient population.

Not only are patients accessing health and pharmaceutical information online—they want more of it. Because many patients are unwilling to discuss certain conditions openly, the Internet is an ideal venue to search for symptoms or treatment options for diseases such as inflammatory bowel disease (IBD) or other potentially embarrassing illnesses. This is likely one of the primary reasons why 91% of American consumers said they would search online to access health information to help them manage their conditions.

MayoClinic.org is a prime example of this shift in information gathering. Recent 2015 data shows that MayoClinic.org averages more than 10 million views per month,7 with the vast majority being patients searching for information about symptoms, a specific disease or condition, or a potential treatment option. The number of patients doing medical research for themselves or loved ones is at an all-time high, and likely to rise dramatically in the foreseeable future.

Among US adults searching for health-related information online within the past year, 35% reported using the Internet specifically to try to identify what health ailment they, or someone close to them, may have been experiencing.2 Once patients identify the condition, they are more prepared to discuss symptoms, possible diagnoses, and potential treatment options with a physician face to face. While this may help facilitate the physician/patient conversation, it can also be frustrating, as patients may incorrectly self-diagnose before seeing the doctor.
It is more important than ever for healthcare and pharmaceutical companies to provide patients with reliable digital resources they can trust and easily understand. In addition, resources that underscore the importance of talking with a physician will help make the communication channels run more smoothly, leading to more positive outcomes.

**EFFECTIVELY ENGAGING THE E-PATIENT**

Amid this myriad of digital communication and engagement tools, is the in-person visit with a physician becoming obsolete? Maybe, if patients have their way:

The patient-physician engagement presents a unique opportunity for healthcare and pharmaceutical companies. By assisting physicians in digital patient education and communication, healthcare and pharmaceutical companies position themselves as a trustworthy and helpful resource for patient materials. In some situations, this could even lead to patients becoming brand-loyal to a specific medication or drug before even going to the physician’s office. This would be quite the accomplishment for a pharmaceutical or healthcare company.

From simple patient and physician resource downloads on a brand’s website to large-scale patient education portals, there are many ways to help encourage and promote patient-physician interaction on a digital level. The evolving e-patient population means that both physicians and healthcare/pharmaceutical companies must change the way they are communicating with patients. Patient marketing must be at the forefront of communication efforts, and messaging must be helpful, precise, and unique, because these patients have a world of information available to them. Even within the correct digital channels, it’s going to take powerful and convincing messaging to attract the attention of today’s empowered e-patients.
THE BURGEONING SOCIAL CONVERSATION

Sharing via social media is a flourishing pastime for patients. While pharmaceutical and healthcare companies are still trying to decipher FDA promotional draft guidelines on how to effectively use social media, patients routinely use social channels to communicate with their peers about personal experiences, symptoms, treatment options, drug effectiveness, home remedies, physician reviews, and more. The Internet has expanded traditional word of mouth to a global notion, and healthcare patients are taking full advantage.

Most of these social and personal conversations don’t happen privately or behind the closed doors of a doctor’s office as they have in the past. Instead, these conversations occur on Facebook, Twitter, and public online patient forums. Pharmaceutical and healthcare companies are able to eavesdrop on public-forum conversations by utilizing “listening” data collection tools such as Treato. However, the true value lies beyond just listening and monitoring. Engaging, communicating, and responding to patients is the key, and the e-patient is ready to engage with healthcare and pharma companies socially.

Over 80% of US adults age 18-24 would likely use social media to share health information

90% of US adults age 18-24 would trust healthcare data found via social media

45% of users age 45-64 would likely use social media to share health information

56% of individuals age 45-64 would likely engage in health activities via social media

37% of consumers trust information posted on social media by a drug company

28% are likely to use social media to share information with a drug company
Roughly 72% of patients said they would not be likely to share information with a drug company via social media.\textsuperscript{10} That leaves 28% who may be willing to share information, and this group represents a sizable patient population. Lack of presence of pharma and healthcare companies on social channels may be a reason why many patients remain skeptical of direct interactions with those companies. As more pharma and healthcare organizations begin to adopt and interact socially, the percentage of patients willing to respond and share may increase as well.

Nonetheless, social media has a strong influence on the e-patient. Among all adults who go online, 72\% of Internet users said they have researched health information,\textsuperscript{2} which could include online reviews and rankings of healthcare services, pharmaceutical drugs, or other treatment options, etc. These types of medical and health-related reviews are easily found via a quick Google search, which usually returns reliable patient discussion forums and review sites such as PatientsLikeMe.com, iHaveUC.com, Treato.com, and countless others.

The upside of this easily shared and accessed information is that if a drug treatment worked well, a patient will often review and recommend this medication to peers online. The inverse is also true—if a medication or treatment does not perform to their standards, patients will share their discontent with the online world. This open interaction is yet another reason why pharmaceutical and healthcare companies are working harder than ever to create positive outcomes for their patients.

There is still a huge opportunity for pharmaceutical and healthcare companies to join in the social media conversation. Once official FDA social media guidance is sorted out, pharma and healthcare companies will more clearly understand how to navigate the social world, and in feeling more comfortable with the legal concerns, many organizations will likely increase their social presence and engagement.

Until then, social media can be a slippery slope for companies considering promoting medications or healthcare products via social media. This is the direction the digital world is moving toward, and it appears that official FDA regulation, once formalized, will provide clear guidance for pharmaceutical and healthcare organizations to enter, engage, and interact via social media. However, there are still plenty of opportunities for pharma and healthcare to begin to engage socially even before official FDA guidance.

The patient audience is already active on social media, and expecting social communication. To completely avoid and postpone it now simply means a missed opportunity today—and a bigger hurdle in the future.
IMPROVING PATIENT ADHERENCE THROUGH DIGITAL

Patient adherence has always been a concern. That likely won’t change as the US population ages and requires more medications for chronic conditions. As an industry, US pharma loses an estimated $188 billion annually because of medication non-adherence. Additionally, non-adherence is a problem that reaches beyond just the pharma companies—it negatively impacts patients’ lives as well. In fact, one-third to two-thirds of medication-related hospital admissions are linked to poor adherence. The average non-adherent patient pays more than $3500 a year due to hospitalization or physician visits compared with an adherent patient.

Because of the issue of non-adherence, many pharmaceutical companies are now budgeting for additional digital campaigns to help directly and indirectly promote patient adherence. For patients, branded website visitation drives a 14.7-point lift in adherence or prescription-refill activity. But just having a branded website is the simple part. The far more challenging aspect is to drive patients to the branded website, and then properly engage with them in order to increase adherence. Pharma companies are executing more downloadable resources, refill reminder programs, and patient-focused content in an effort to improve medication adherence.

The exciting news for pharma and healthcare companies is that patients are admittedly open to programs to help keep them adherent. For example, 35% of patients who admit to not following a treatment plan say they would be more likely to follow instructions if they received reminders via email, voicemail, or text. Additionally, 93% of patients said they would like to receive email communications from their physician, and 14% would even like Skype-style video chatting. If done correctly, these types of digital communications could certainly be used to promote patient adherence.

Providing online options for patient engagement is a trusted way to improve adherence. Kaiser Permanente, for example, is well known for its successful patient-adherence program. The managed-care organization created an initiative that allows patients to access medical records and fill prescriptions online. Their proportion of patients who neglected to get their prescriptions filled plummeted from 22% to between 7% and 11%. Ease of use and convenience for patients were among the leading reasons this digital channel was so successful.

Many of the pharmaceutical and healthcare companies that have already begun to execute patient-focused adherence campaigns have seen clear improvement. It is obvious that patients are an important avenue to consider when developing marketing campaigns, and increased patient adherence especially, which ultimately leads to better patient outcomes, is one of the most desired and attainable goals of the industry.

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“Drugs don’t work in patients who don’t take them.”
C. Everett Koop, former Surgeon General of the United States

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E-PATIENT EMPOWERMENT IS HERE TO STAY

Digital has become a way of life for the new breed of empowered e-patients. And they are expecting pharmaceutical and healthcare companies to keep up.

Patients are using the Web to search for digital answers to questions about symptoms, self-diagnoses, medication and physician reviews, resources, and anything else tied to their personal health. These e-patients are also sharing all kinds of personal health information online, and are seeking a stronger connection with pharmaceutical and healthcare organizations via social media.

Pharmaceutical and healthcare companies that execute solely on physician-focused campaigns will likely be missing out on a huge opportunity to capitalize on patient interaction, engagement, and value. Direct-to-consumer (DTC) healthcare marketing campaigns are no longer optional, and the digital aspect of these initiatives is rapidly becoming essential. These types of campaigns will ensure proper communication with one of healthcare’s largest and most important audiences—the e-patient. It’s the dawn of a new era. Is your organization ready?

REFERENCES


