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# Engaging patients through social media

Is healthcare ready for empowered  
and digitally demanding patients?

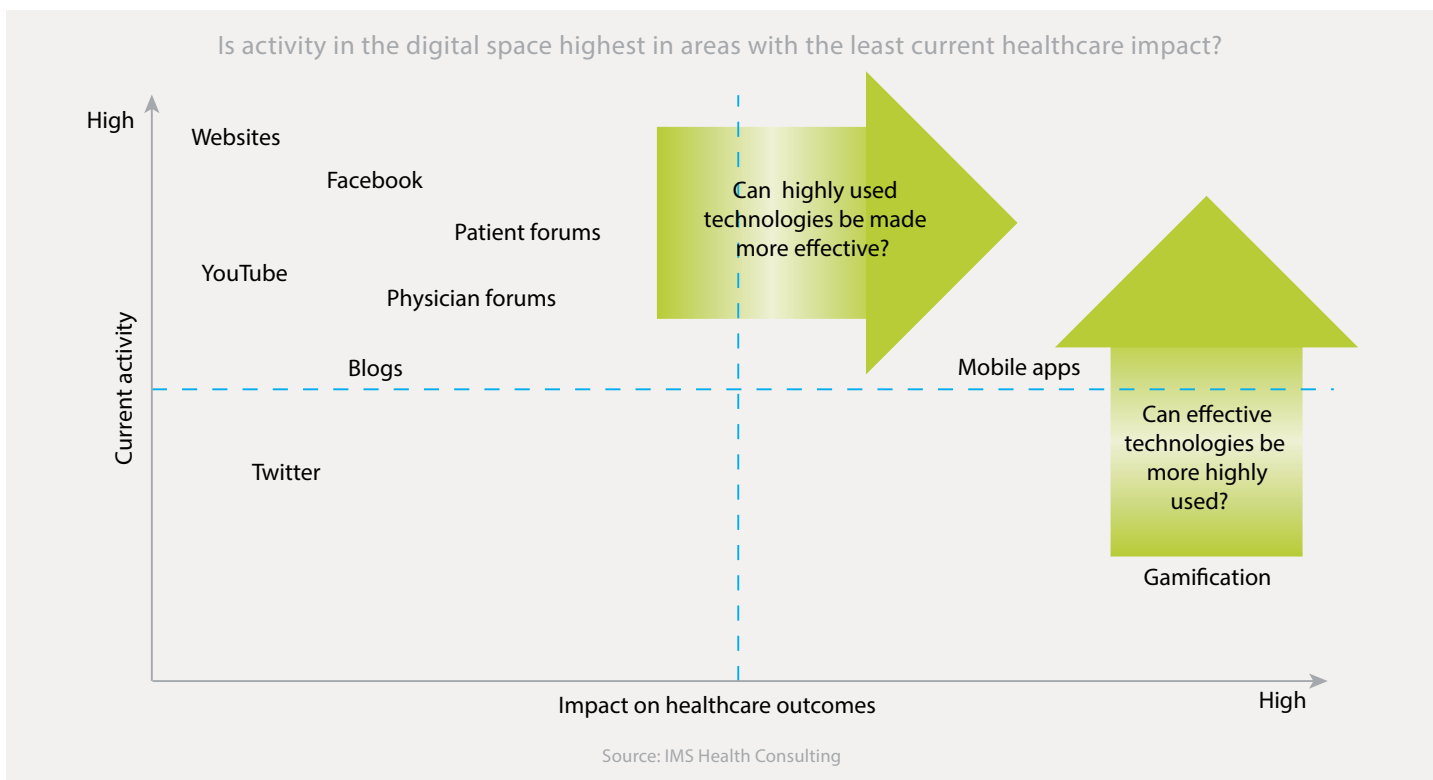


# Executive summary

The transformation of information gathering and the emergence of the engaged patient has demonstrated the increased importance of social media in the broader healthcare context. A patient's need for information gathering relating to healthcare can be observed throughout the treatment pathway – hence, ensuring that patients have access to reliable, up-to-date, and understandable information remains a significant challenge. Due to patient trust in clinicians and the broad reach of social media, healthcare professionals (HCPs) are in a prime position to drive better healthcare outcomes through social media. Currently there are few formal and many informal organized healthcare professional and patient groups that try to ensure the correctness and accessibility of healthcare information, with no clear definition of responsibilities. It will become increasingly important to ensure the monitoring and regulation of the space where patients gather their information and form their opinions.

For the healthcare industry, it is becoming increasingly important to be able to react quickly and decisively to events on social media. Additionally, companies are increasingly utilizing social media as a tool to build relationships with patients and the general public. Mid-sized, specialized and consumer care companies are leading the change from uni-directional broadcasting of information to an engaging and relationship-orientated online conversation. However, in general, the industry needs to become less risk averse to new engagements with stakeholders to remain relevant in the overall healthcare discussion. Ironically, regulators are often more effective in their own usage of social media, in part due to fewer restrictions. The increased engagement of regulators will drive further uptake of the digital channels by other stakeholders and demonstrate the importance of these channels to the overall healthcare ecosystem.

Further investigation needs to be conducted to assess the real impact of social media, not only from a return on investment perspective but also its impact on healthcare decisions by HCPs and patients alike. An index such as the IMS Health Social Media Engagement index, which attempts to quantify the success of corporate and regulator social media engagements, should be utilized to assess impact and influence of social media, driving discussions towards what these channels should be utilized for and how they fit into the overall healthcare agenda.

**Figure 1: Conceptual viewpoint of digital activities**

## Channel definitions

The key social media channels that have been considered for this report are Wikipedia, Twitter, Facebook and YouTube. All of the assessed channels have capabilities, advantages and disadvantages that need to be considered before utilization (see Table 1). While blogs, forums, physician networks and patient support websites are an important part of social media interactions, these channels have not been examined in detail.

Table 1: Assessed social media channels








Channel	Uses	Advantages	Disadvantages
Wikipedia 	Comprehensive online encyclopedia Editor-moderated content from user consensus	Trusted by patients and many physicians Comprehensive and free online information source Emphasis on self-regulation resulting in higher quality control than other social networks	Vulnerable to misinformation, though most content is to a high standard The combination of trust in Wikipedia and its vulnerability to both mistakes and author bias has caused concern within the academic and medical community <sup>13</sup>
Twitter 	140 character user-generated comments or 'tweets' Following other users Sharing links Commenting on personal and corporate accounts	Effective broadcasting platform, high viral possibilities Strong for news and live events such as conferences Small message size is easily digestible	Character limit makes it difficult to have any depth Hard to generate meaningful engagement Requires regular updating Very small window for meaningful engagement No central content control
Facebook 	Add friends to create a peer network A plethora of services including groups, events, games and personal messaging Sharing links	The largest social network based on numbers of monthly active users The most diverse social network Capable of detailed and engaging interactions Enhanced word-of-mouth effect from friends' activity	Regulatory adherence is more difficult and varies according to geographic region Small window for meaningful engagement Privacy concerns Very little central content control
YouTube 	Sharing video content Commenting on videos Following content creators	Favored by physicians for highly informative, detail-orientated videos Engagement correlates to emotive patient focused content Can be linked to other social networks	Videos often require a large time investment Capability to share videos within the social network is limited Filming and editing video to a suitable standard is expensive and requires specialist skills

Table 2: Regulation differences of key regions

Country	Regulatory bodies	Key documents	Additional comments
U.S. 	U.S. FDA The Office of Prescription Drug Promotion (OPDP)	Guidance for Industry: Responding to Unsolicited Requests for Off-Label Information About Prescription Drugs and Medical Devices, Dec 2011  Update expected by July 2014 at the latest - "The development and issuance of guidance for social media is among the highest of FDA's priorities"	The existing guidance for the pharmaceutical industry mostly governs the topic of off-label usage. Other regulations must be extrapolated from precedent  The "One Click Rule" is inadmissible: social media posts must always display a full product profile when naming a drug online  A consumer survey's post-hoc study is not considered sufficient evidence for advertising claims  Can discuss investigational uses of the drugs in an appropriate manner, but no off-label promotion
Canada 	Pharmaceutical Advertising Advisory Board (PAAB) Health Canada's Health Products and Food Branch	Health Canada's general advertising policies are intended to apply to social media  PAAB Code Review 2012, "Section 6.5: Online Activities"  Latest update in 2012 appears to cover much of the industry	Once a website is determined to be advertising, the site in its entirety, including any user-generated content, is subject to regulatory control
EU 	International Federation of Pharmaceutical Manufacturers and Associations (IFPMA): self-regulating	Regulatory document rejected in June 2009  UK - ABPI's Code of Practice for the Promotion of Prescription-Only Medicines (the "ABPI Code")	While little regulation exists companies are self regulating: digital marketing strategies are underway but investment is small and initiatives limited in scope  Regulators fear direct-to-consumer (DTC) information and escalating pharma costs due to increased patient advocacy for drugs  The European Federation of Pharmaceutical Industries and Associations (EFPIA) is attempting to push for self regulation

To define the indices, individual attributes have been assigned to the respective indices and weighted according to the usage of social media in healthcare and IMS Health internal expertise. Results were divided by the number of overall company posts, tweets or videos posted, to reduce the impact of volume and shift the indices focus to per post measures.

Table 7: IMS social media index definitions

Channel	Measure	IMS Health Reach Index	IMS Health Relevance Index	IMS Health Relationship Index
Facebook	No. of posts	O	O	O
Facebook	No. of posts from others			
Facebook	No. of likes of posts	X	X	
Facebook	No. of shares of posts	X	X	
Facebook	No. of comments		X	X
Facebook	No. of replies			X
Twitter	No. of company tweets	O	O	O
Twitter	No. of re-tweets of companies tweets	X	X	
Twitter	No. of favorites of company tweets		X	
Twitter	No. of replies of a company to other tweets			X
YouTube	No. of videos posted	O	O	O
YouTube	No. of comments by others		X	X
YouTube	No. of comments from company			X
YouTube	No. of views	X	X	

LEGEND

O = used as denominator for per post X measurement

X = used to calculate index

Following the definition of all three indices, the combined IMS Health Social Media Engagement Index was defined by weighting Reach, Relevance and Relationship Index as 1, 2 and 4 respectively to reflect their relative importance in social media.

## IMS Health Social Media Engagement Index data

Facebook					
	Comments per Post	Likes per Post	Shares per Post	Post from Others per Post	Replies per Post
AstraZeneca	0.3	55.9	1.1	0.0	0.0
Bayer	2.9	71.4	7.4	0.4	0.4
Boehringer Ingelheim	2.1	133.1	20.5	0.3	0.2
Fresenius	0.0	0.0	0.0	0.0	0.0
Gilead Sciences	0.2	0.5	0.2	0.1	0.0
GlaxoSmithKline	5.9	159.7	34.0	0.0	0.2
Johnson & Johnson	6.9	589.5	65.7	1.9	0.7
Lilly	1.2	58.6	6.3	0.0	0.1
Merck & Co	2.4	37.3	8.2	0.2	0.1
Merck KGaA	0.9	16.0	22.1	0.1	0.0
Novartis	3.0	93.0	26.7	0.0	0.0
Novo Nordisk	3.1	142.6	16.7	1.1	0.2
Pfizer	3.9	102.9	21.7	0.0	0.0
Sanofi	0.6	2.8	1.1	0.0	0.1
Teva	1.6	49.0	6.5	0.0	0.0

Twitter			
	Retweets per Tweet	Replies of Company per Tweets	Favorites per Tweet
Abbvie	3.5	0.0	0.6
Amgen	2.1	0.4	0.5
Astellas Pharma	1.7	0.2	0.1
AstraZeneca	2.1	0.5	0.3
Bayer	4.0	0.2	0.2
Boehringer Ingelheim	2.2	0.2	0.5
Bristol-Myers Squibb	4.3	0.0	0.5
Fresenius	0.2	0.0	0.0
Hospira	2.0	0.7	0.2
Johnson & Johnson	6.3	0.4	0.5
Lilly	1.8	0.2	0.2
Merck & Co	5.9	0.3	0.3
Merck KGaA	0.2	0.0	0.1
Novartis	2.7	0.1	0.5
Novo Nordisk	2.0	0.3	0.2
Pfizer	3.8	0.2	0.5
Roche	4.2	0.3	0.8
Sanofi	1.2	0.2	0.2
Shire	1.5	0.0	0.9
UCB	1.9	0.8	0.1



YouTube			
	Comments from Company per Post	Comments of Others per Post	Total View per Post
Amgen			516
Apotex			157
Astellas Pharma		2.7	103
AstraZeneca			2,156
Baxter			889
Boehringer Ingelheim		1.3	922
GlaxoSmithKline			35,979
Hospira			9,218
Johnson & Johnson	3.5	23.4	25,543
Lilly		0.1	453
Merck & Co			377
Novartis			25,804
Novo Nordisk		0.0	6,824
Pfizer			15,987
Roche	0.0	0.5	6,944
Sanofi	0.0	0.8	998
UCB			965