



Results of the Health Care Survey 2011

Health Care Marketing Congress
September 2011

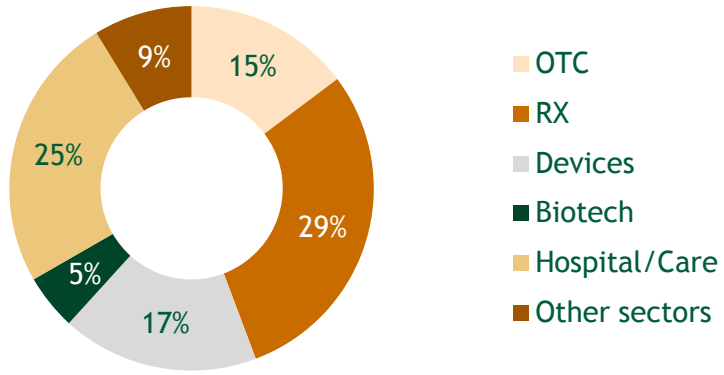
THE HOUSE OF
MARKETING



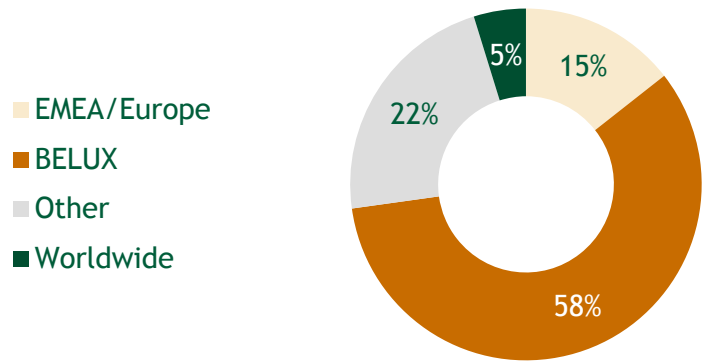
#hcms11 #thom

Survey participants

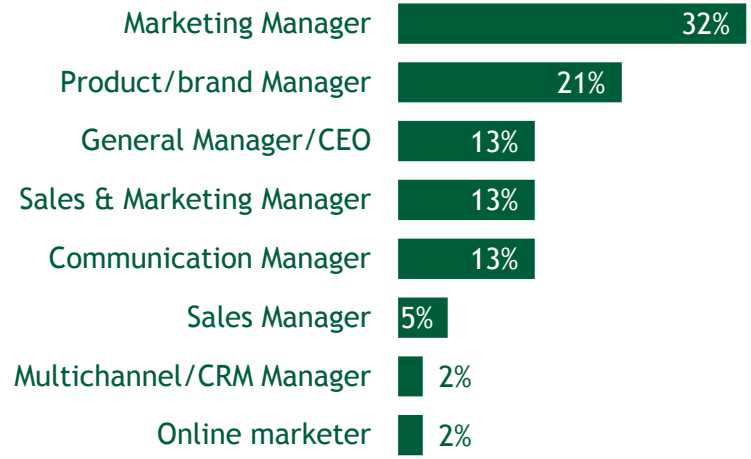
Sector



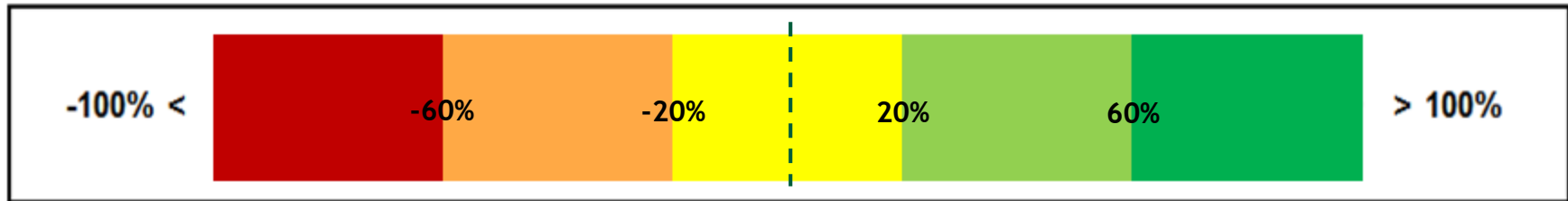
Scope of responsibilities



Job function



Key concept: Net Average Index (NAI)



The percentage reflects a balance between the positive, neutral and negative views. It can vary from -100% to +100% depending on the amount of confidence.

A positive NAI indicates an increase of importance, the number reveals how relevant or outspoken this increase is.

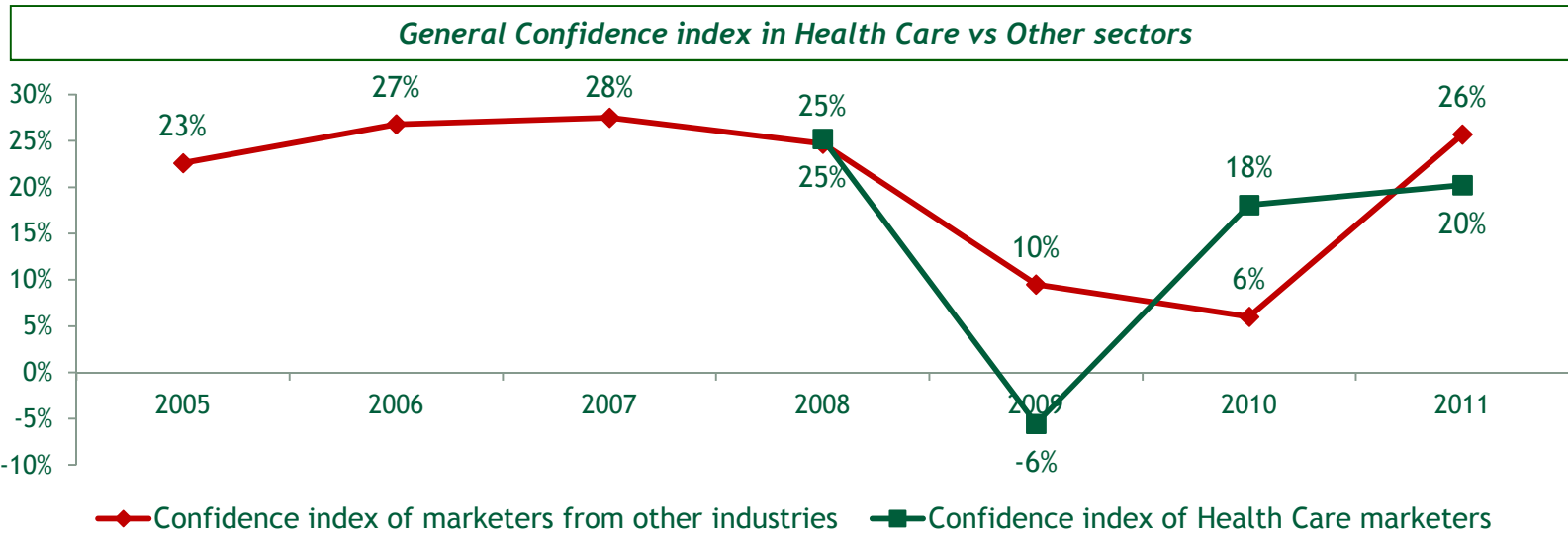
How do Health Care Marketers feel about their FUTURE?

Confident

Hesitant

Pessimistic

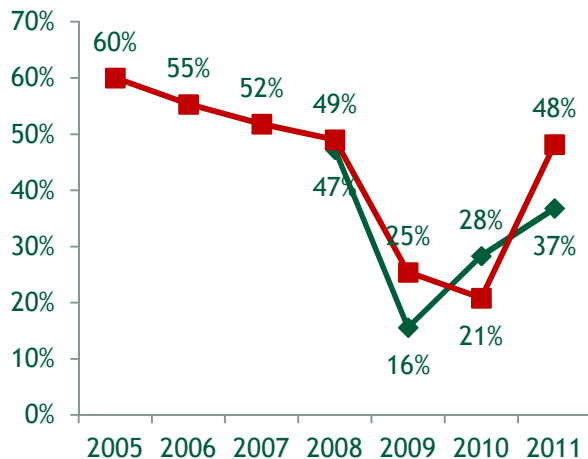
HC marketers are hesitatingly gaining confidence



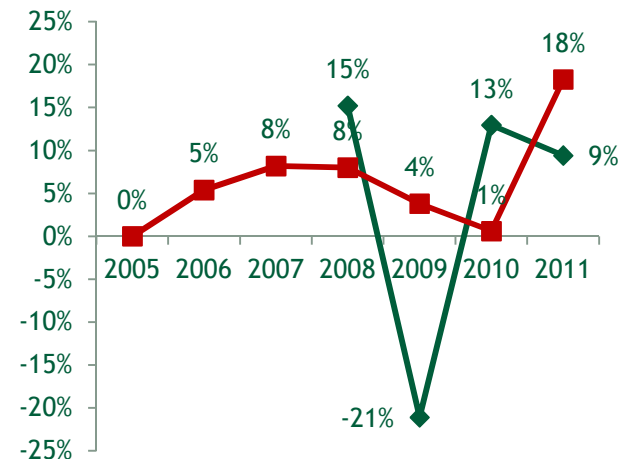
Evolution in Projects



Evolution in Team size

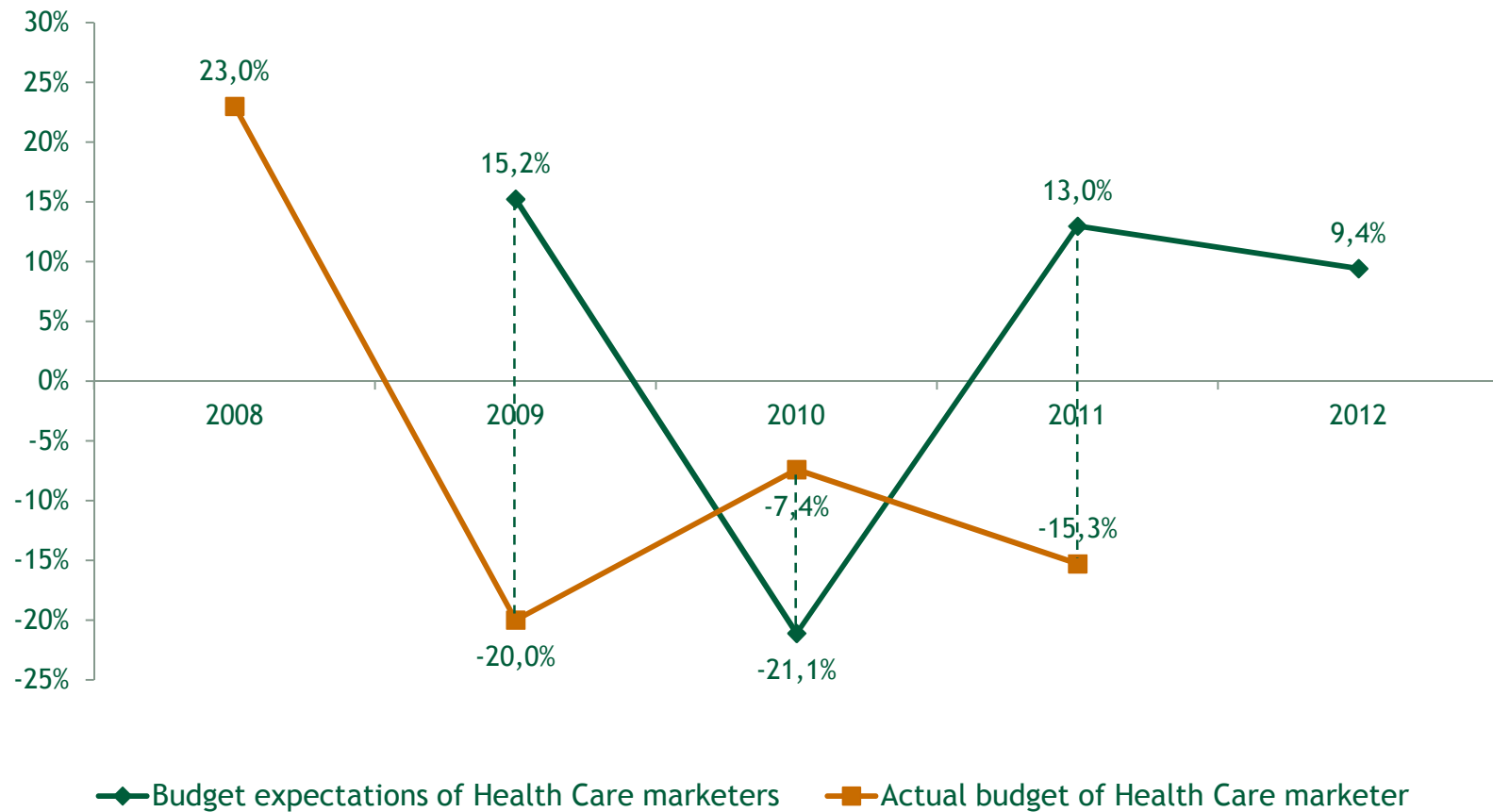


Evolution in Budget



HC marketers estimate their budget based on the actual budget instead of the future strategy

Q: In 2011, how did the total marketing budget available within your marketing department change and what are the expectations for 2012?



Key takeaway n° 1

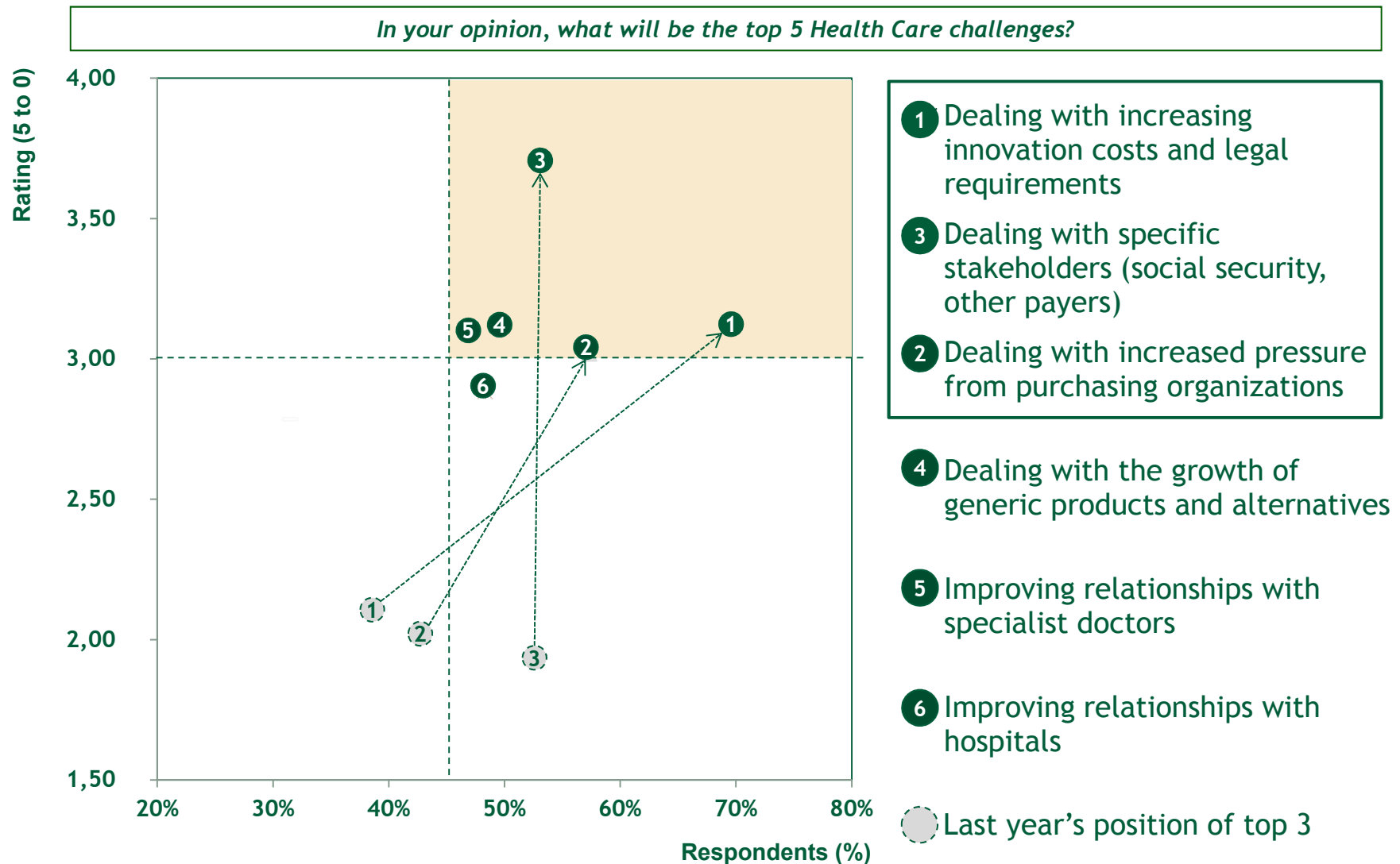
**“With budgets under pressure,
Health Care confidence is being
challenged”**



Which sentence is TRUE?

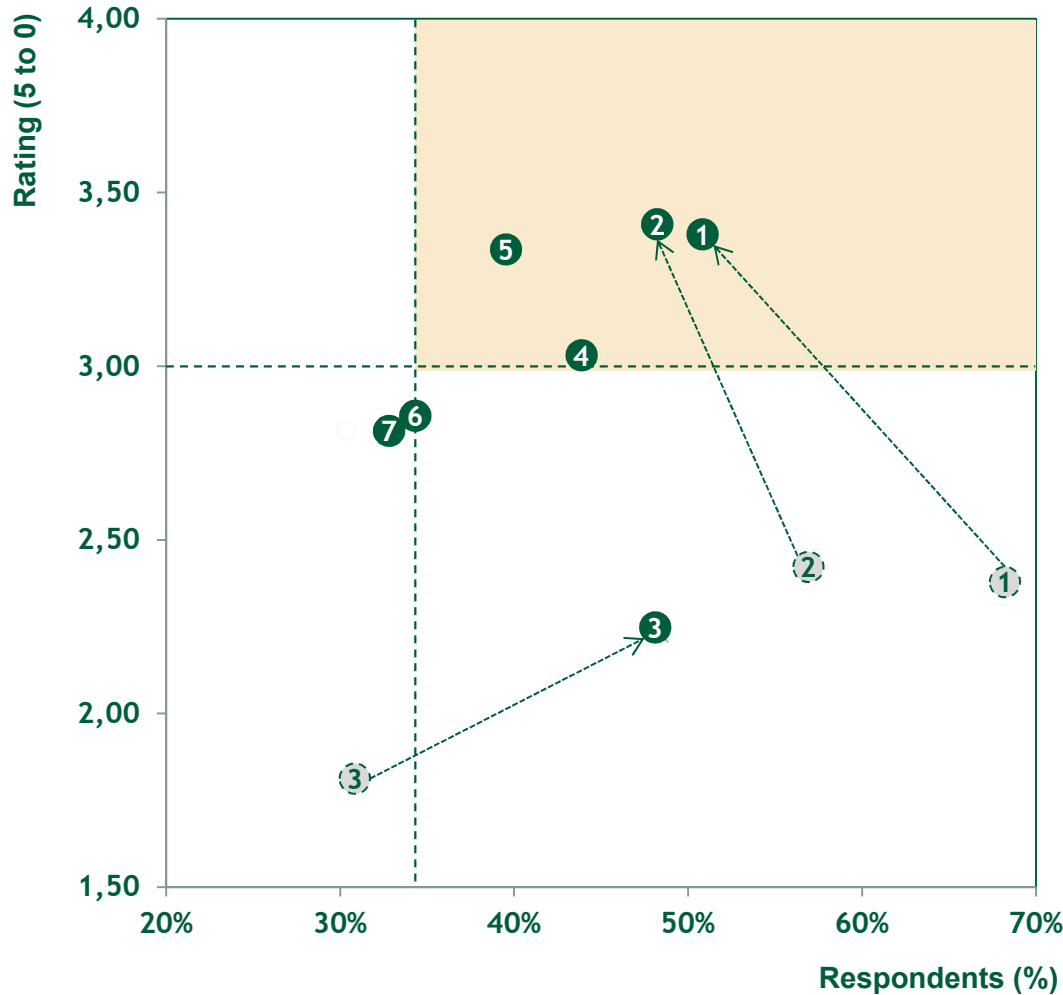
- Patients will be more loyal towards a product
- Improving relationships with GP's has become the nr 1 Health Care Challenge
- Patients' influence is expected to increase the most

Top Health Care challenges are more administrative while relationship building is pushed down



Dealing with new media enters the top 5 Marketing challenges but remains very low rated

In your opinion, what will be the top 5 Marketing challenges?



- 1 Building customer loyalty and trust
- 2 Differentiating from competitors on targeted segments
- 3 Dealing with new media (online, social, mobile)

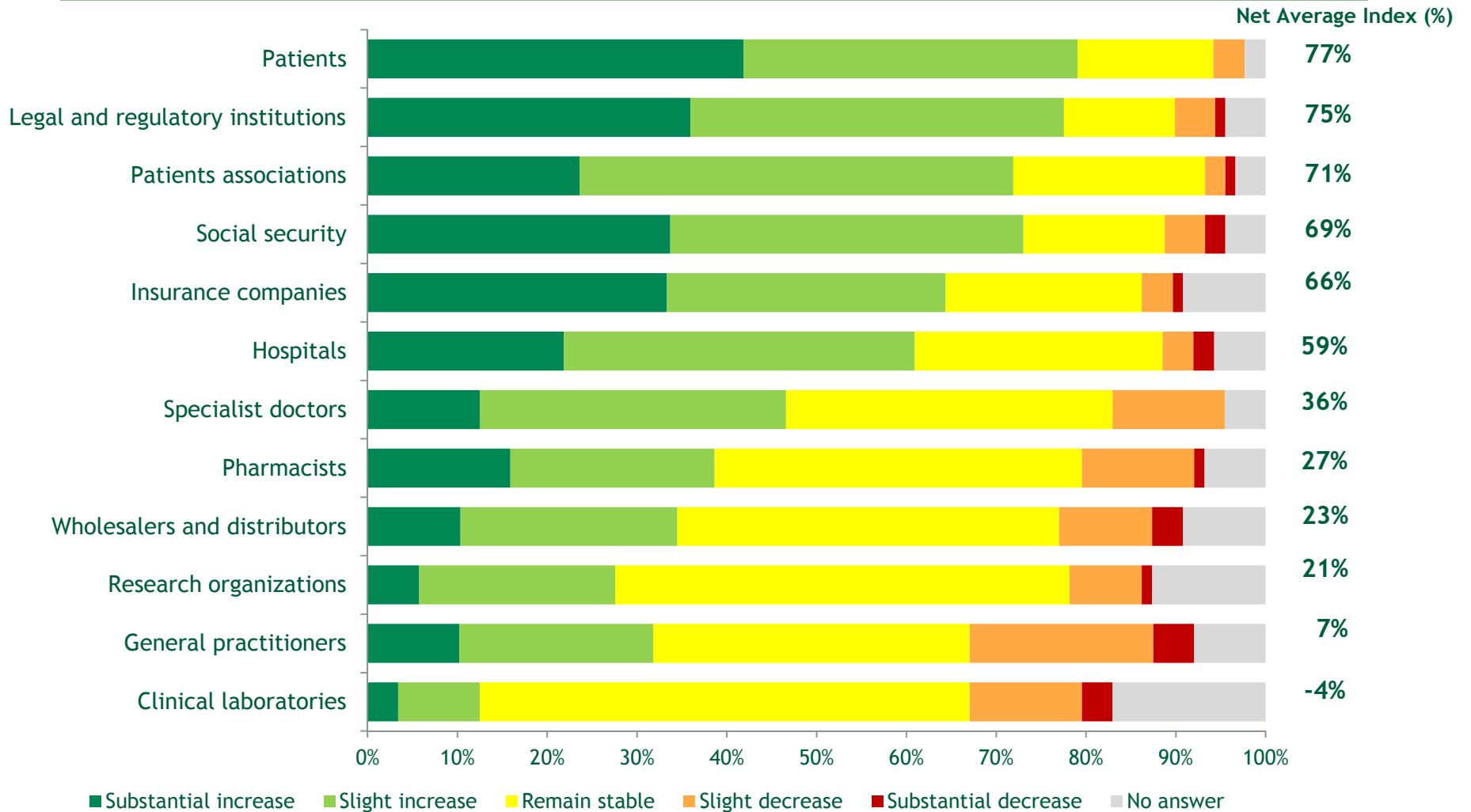
- 4 Increasing alliances with strategic partners
- 5 Building a strong brand
- 6 Increasing efficiency of marketing and sales processes

- 7 Dealing with empowered patients

○ Last year's position of top 3

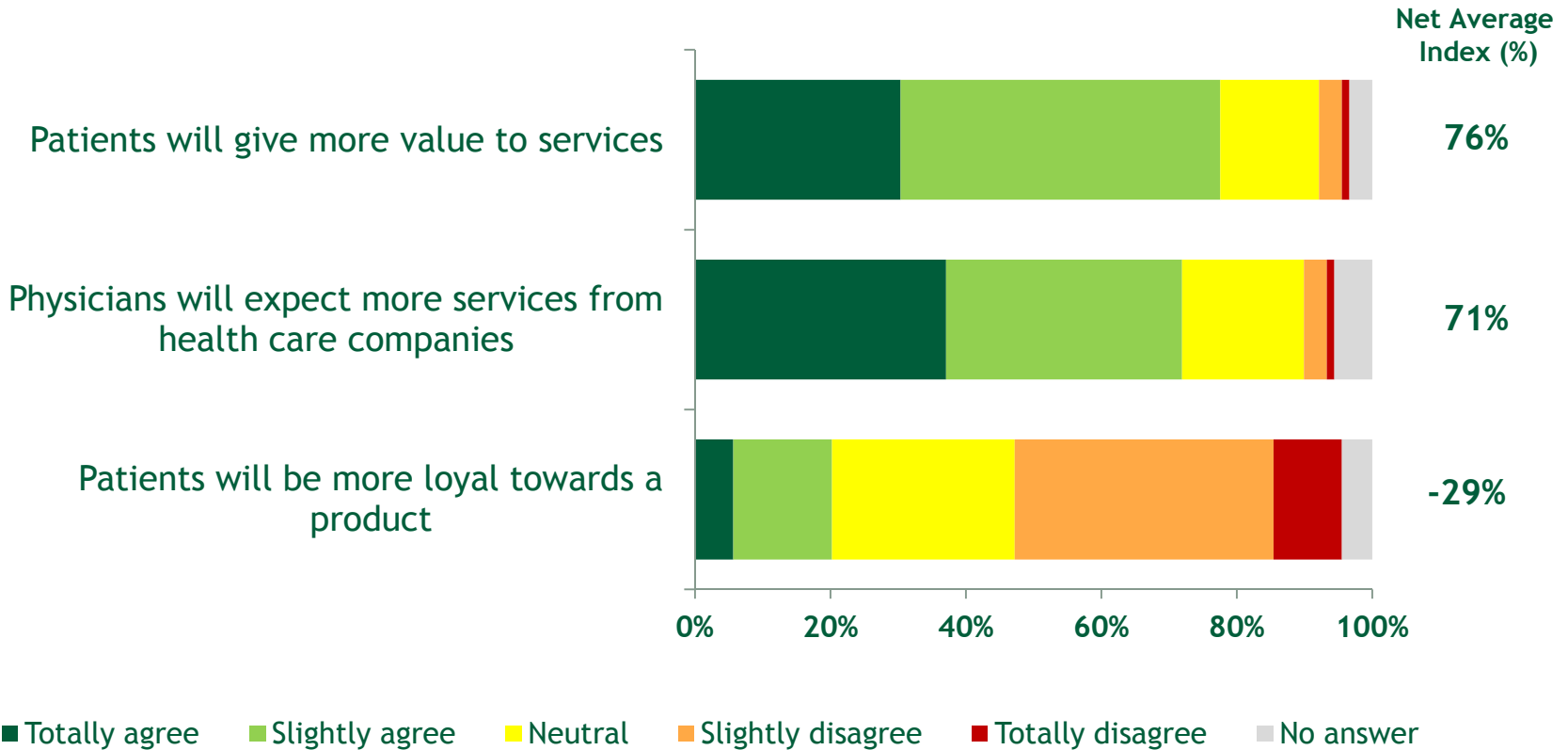
While the number of influencers increases, a new decision maker holds the top: the patient

How do you evaluate the influence of the following stakeholders ?



Delivering relevant services to both patients and physicians are expected to be key

To what extent do you agree with the following statements?



Key takeaway n° 2

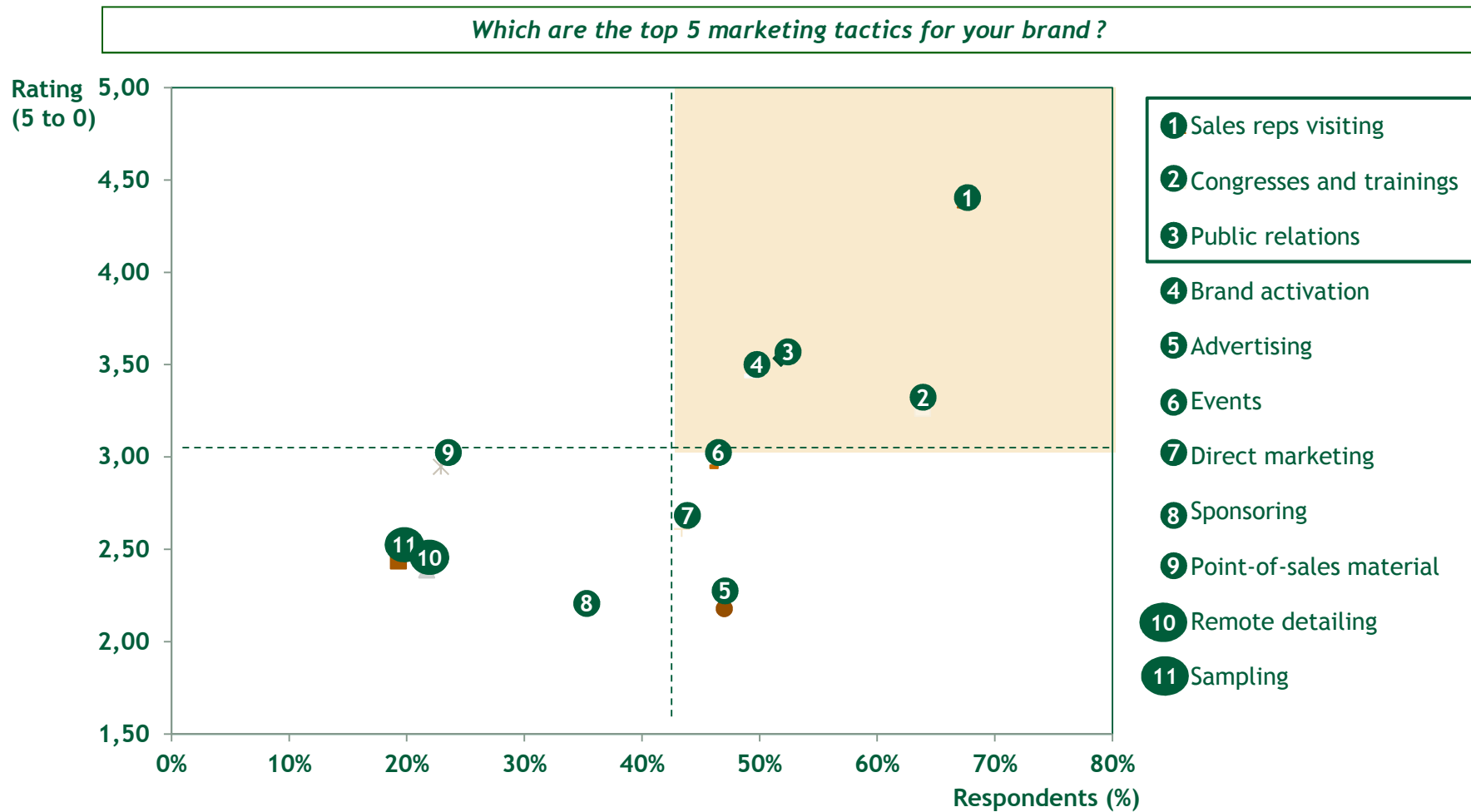
“Traditional Health Care challenges have a hard time to include new trends”



Major challenges and tight budgets ahead, how will Health Care marketers handle it?

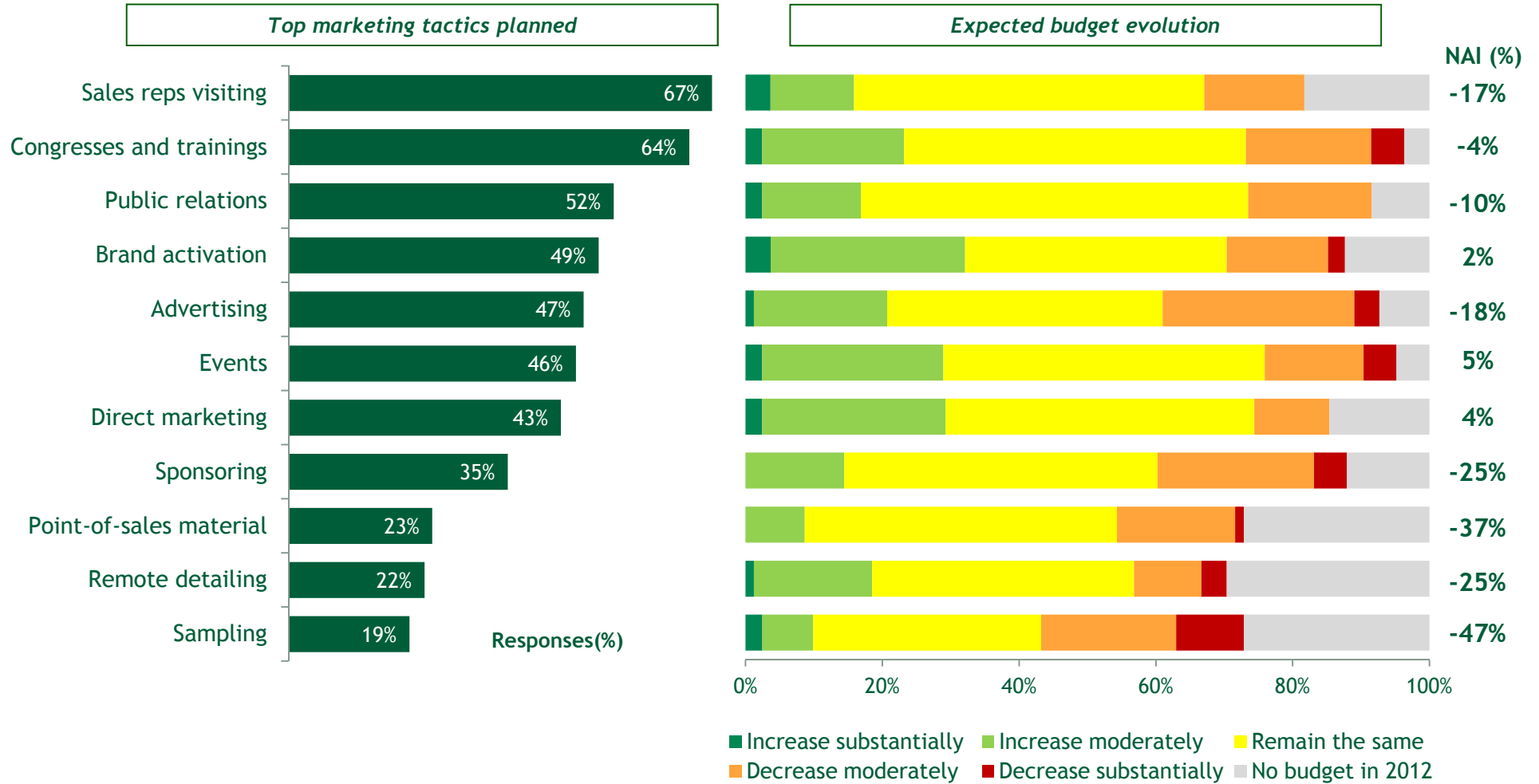
- They will use traditional tactics (sales reps,...) through traditional media channels (own brochures, magazines,...), leaving the 'online' matter for later
- They will need people with specific HC skills to handle these traditional challenges through traditional HC tactics
- They will use traditional tactics combining it mainly with the online media channel but keeping it conservative (mainly website building/optimization)

To build customer loyalty, HC marketers favor traditional 'human interaction' tactics



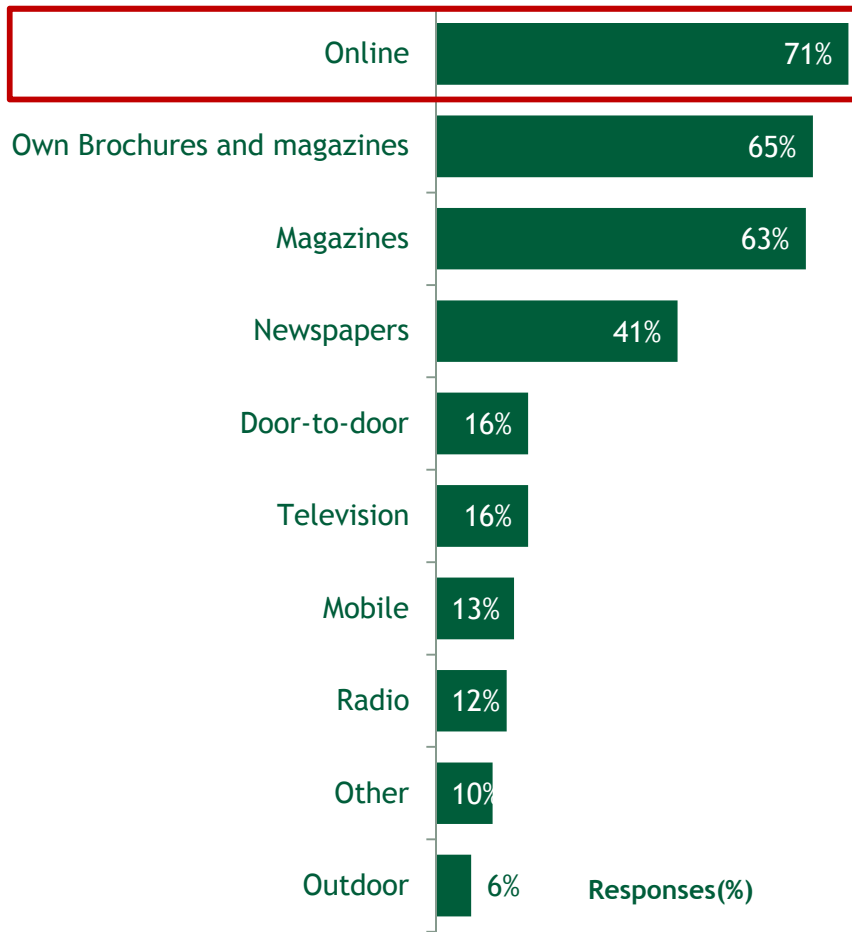
While costs are clearly under pressure, detailing, congresses and trainings remain top marketing tactics

Which are the top 5 marketing tactics planned for your brand & how will your budget for these evolve?

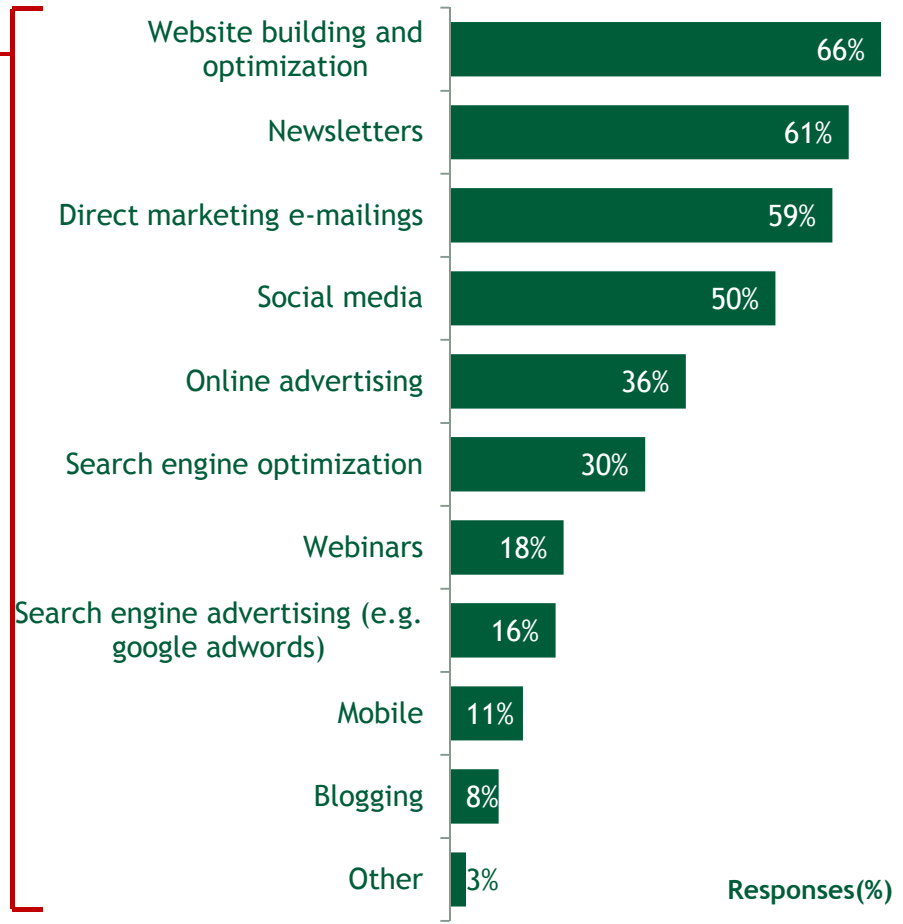


Online is the first planned media channel but with a very conservative and low structured approach

Which media channels have you planned to use?



Which online channels have you planned to use?





Key takeaway n° 3

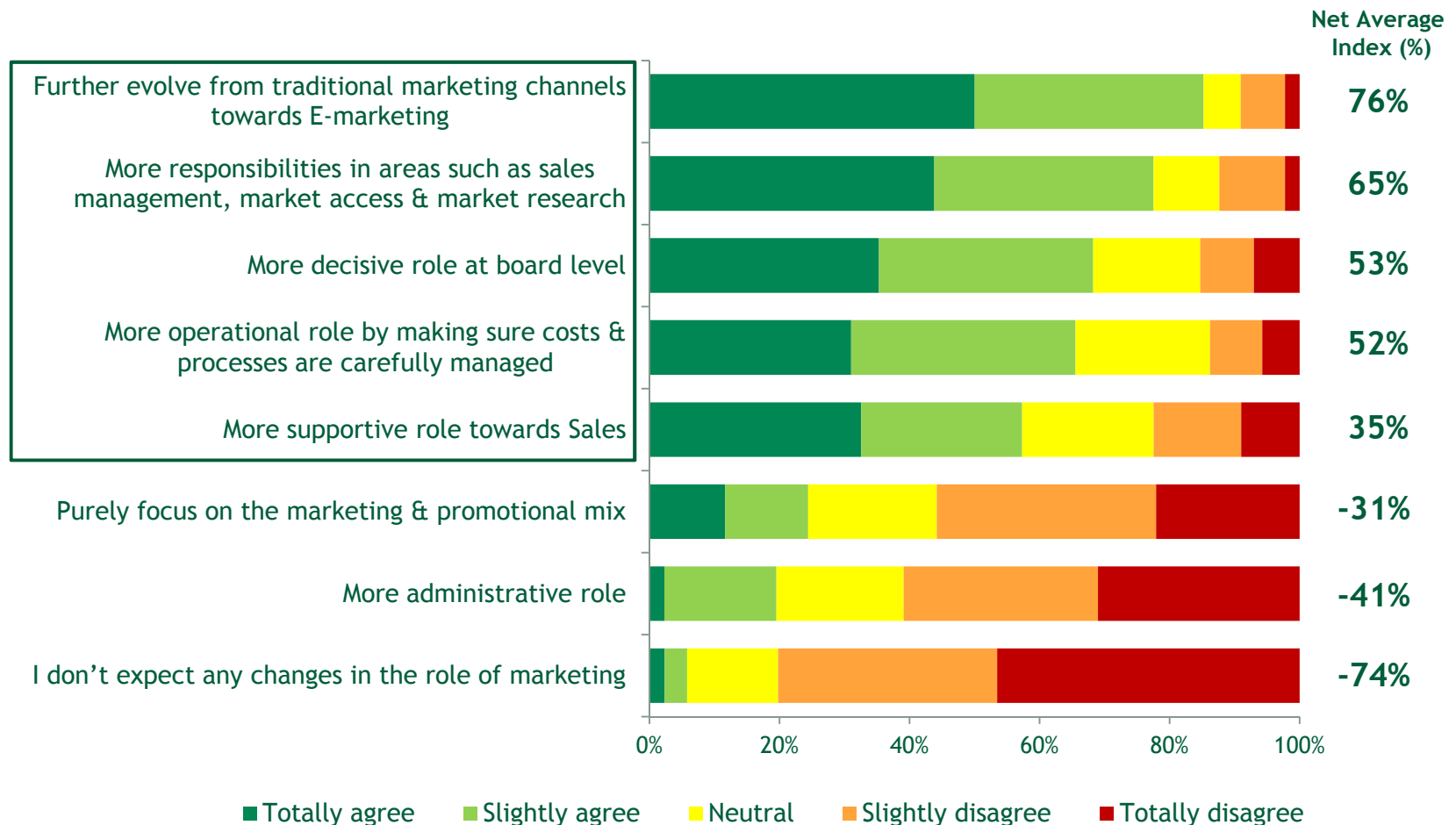
“Traditional tactics will leverage online resources to tackle challenges”

How will the future of Health Care marketing look like?

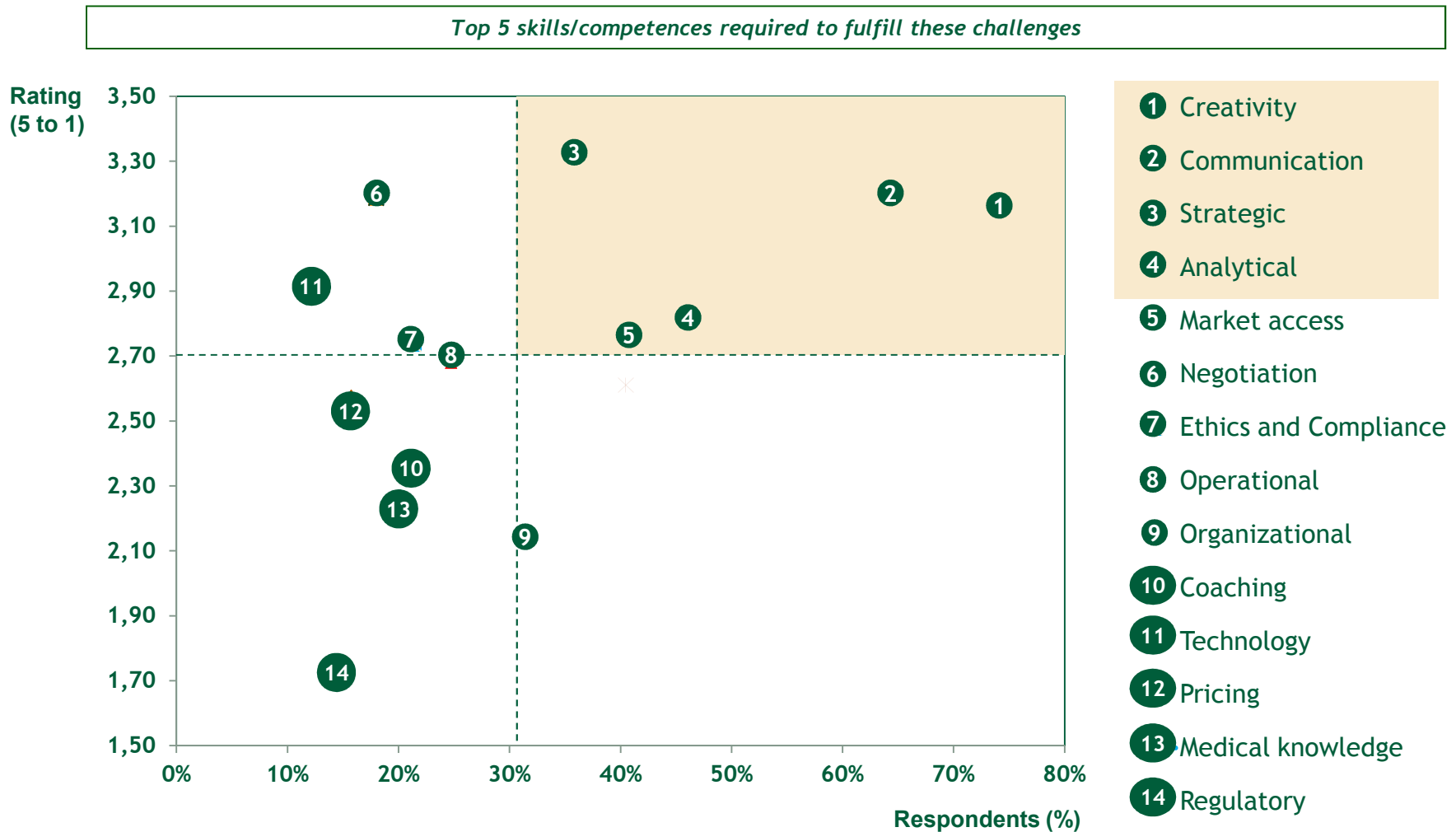
- Just like the present
- It will include responsibilities of sales management, market access and research
- It will require a significant amount of medical knowledge

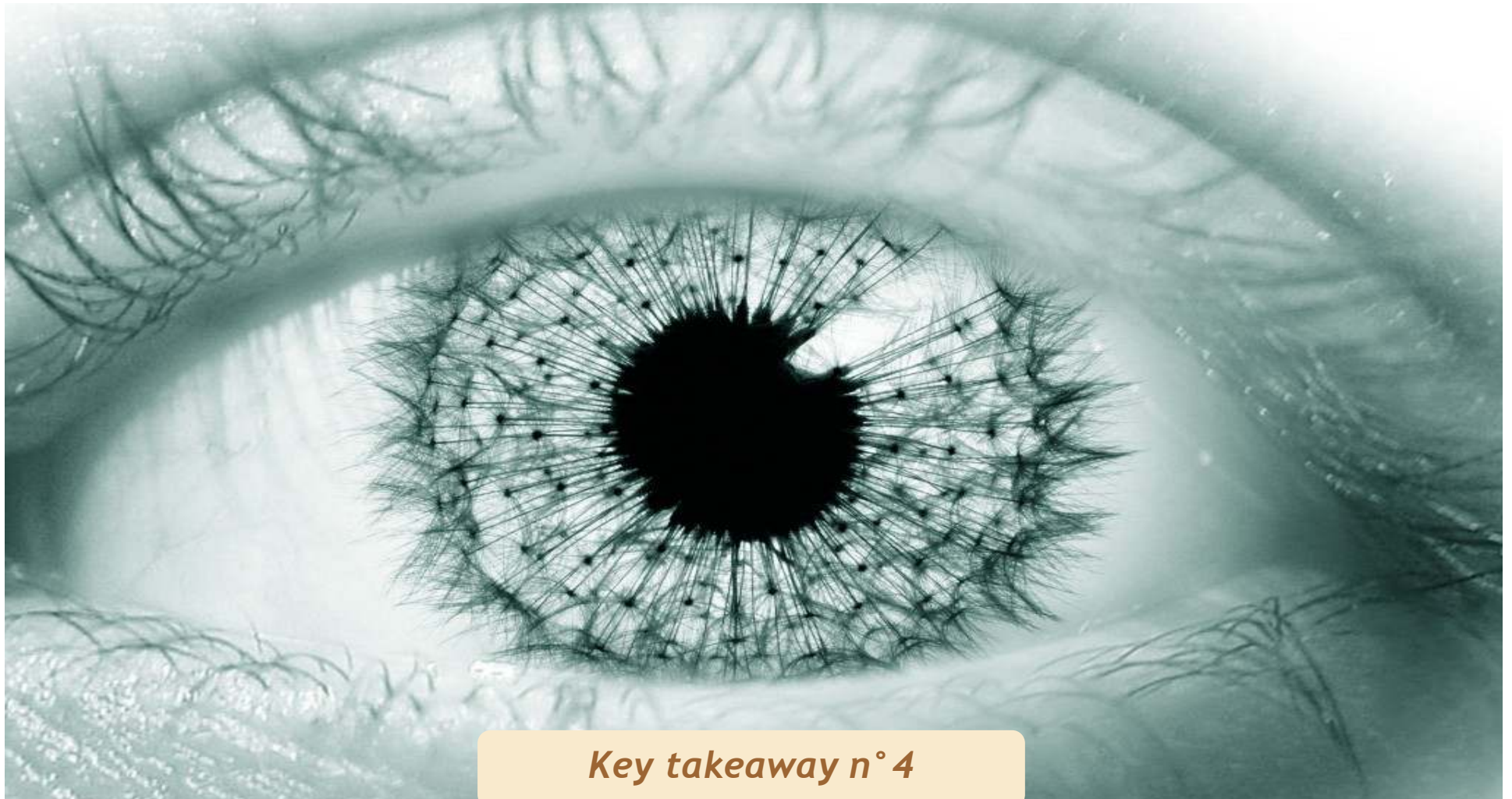
Marketers all expect changes in the future role of Marketing but their opinions lack realism

How do you expect the role of Marketing to change in the future?



Top skills needed to take on these challenges are not health care related





Key takeaway n° 4

“Marketers will need to step away from their traditional HC marketer's role”

To wrap things up... 4 Key Takeaway's



Key takeaways

1. With **budgets** under pressure, Health Care **confidence** is being challenged
2. Traditional Health Care challenges have a hard time to include **new trends**
3. Traditional tactics will leverage **online resources** to tackle challenges
4. Marketers will need to **step away** from their **traditional** HC marketer's role



PATIENT

An initiative by

THE HOUSE OF
MARKETING



<http://www.thom.be/>

In collaboration with



Back-up slide

Key concept: Net Average Index (NAI)

Quantifying Health Care Marketers' beliefs

How do you expect a certain parameter to evolve?

→ Options: Decrease, will stay the same, increase

→ Calculation of the index: a percentage between -100% and +100%

$$-100\% < \frac{\text{increase (\%)} - \text{decrease (\%)}}{\text{increase (\%)} + \text{decrease (\%)}} \times 1 - \frac{\text{neutral (\%)}}{\text{increase (\%)} + \text{decrease (\%)} + \text{neutral (\%)}} > 100\%$$

-100% <  -60% -20% 20% 60% > 100%

The percentage reflects a balance between the positive, neutral and negative views. It can vary from -100% to +100% depending on the amount of confidence.

A positive NAI indicates an increase of importance, the number reveals how relevant or outspoken this increase is.