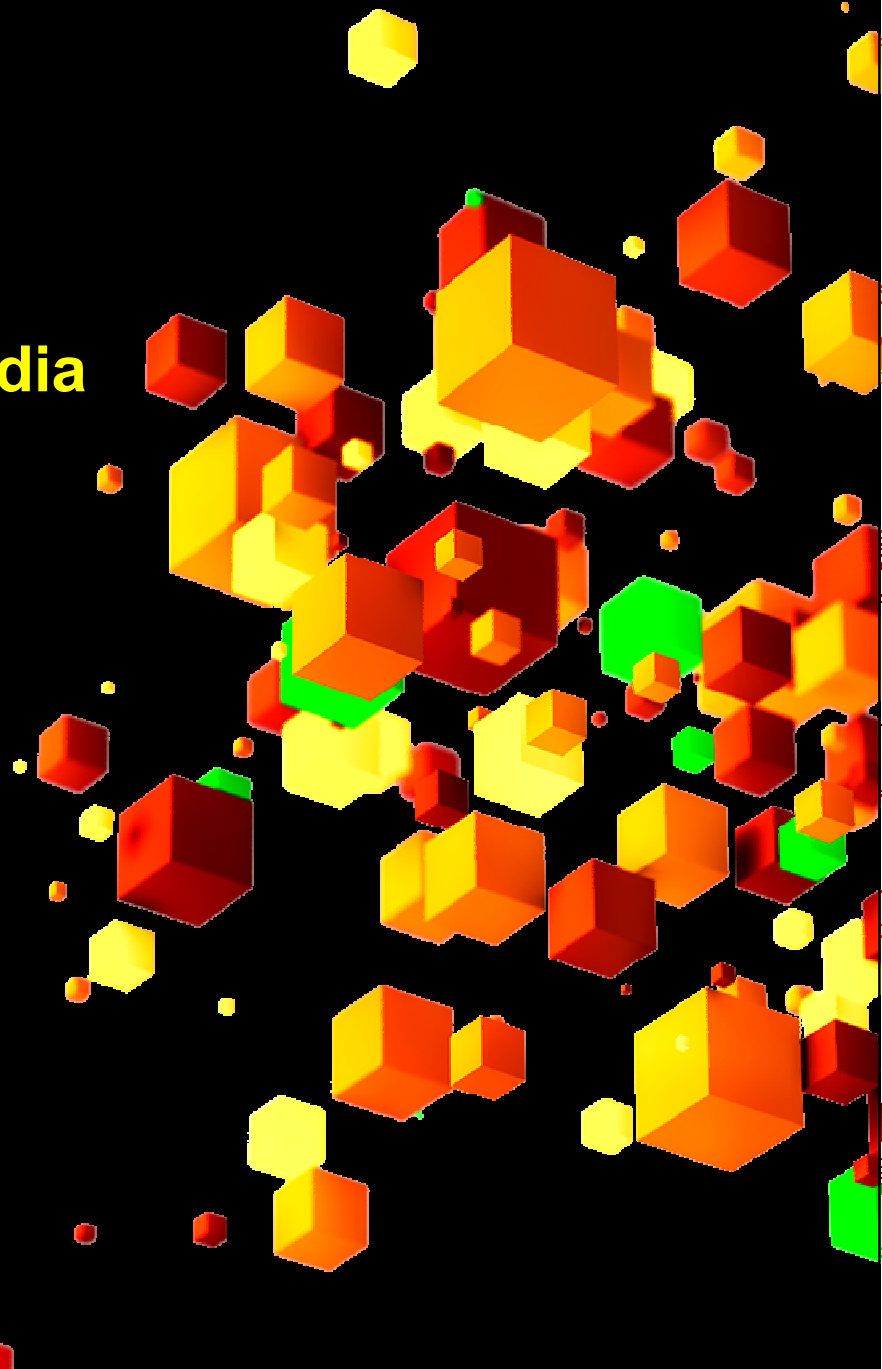




Insights on the physician media consumption landscape

Association of Medical Media
November 2010

Dave Emery
Vice President, Sales & Client Services
Kantar Media Professional Health



3 take-aways

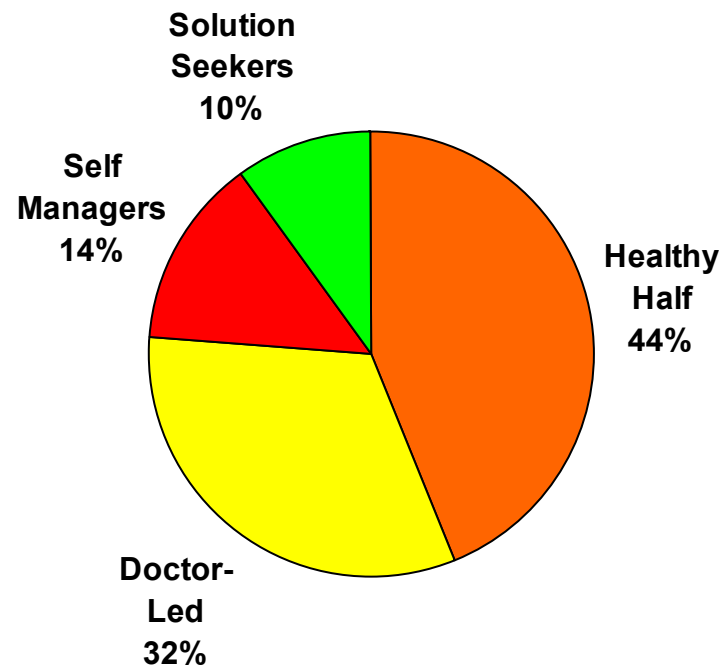
- Physicians still matter
- An evolving multimedia information landscape, with new information sources supplementing existing ones, creates opportunities
- Journals remain the best option for delivering reach, frequency and importance as an information source



Doctors still matter



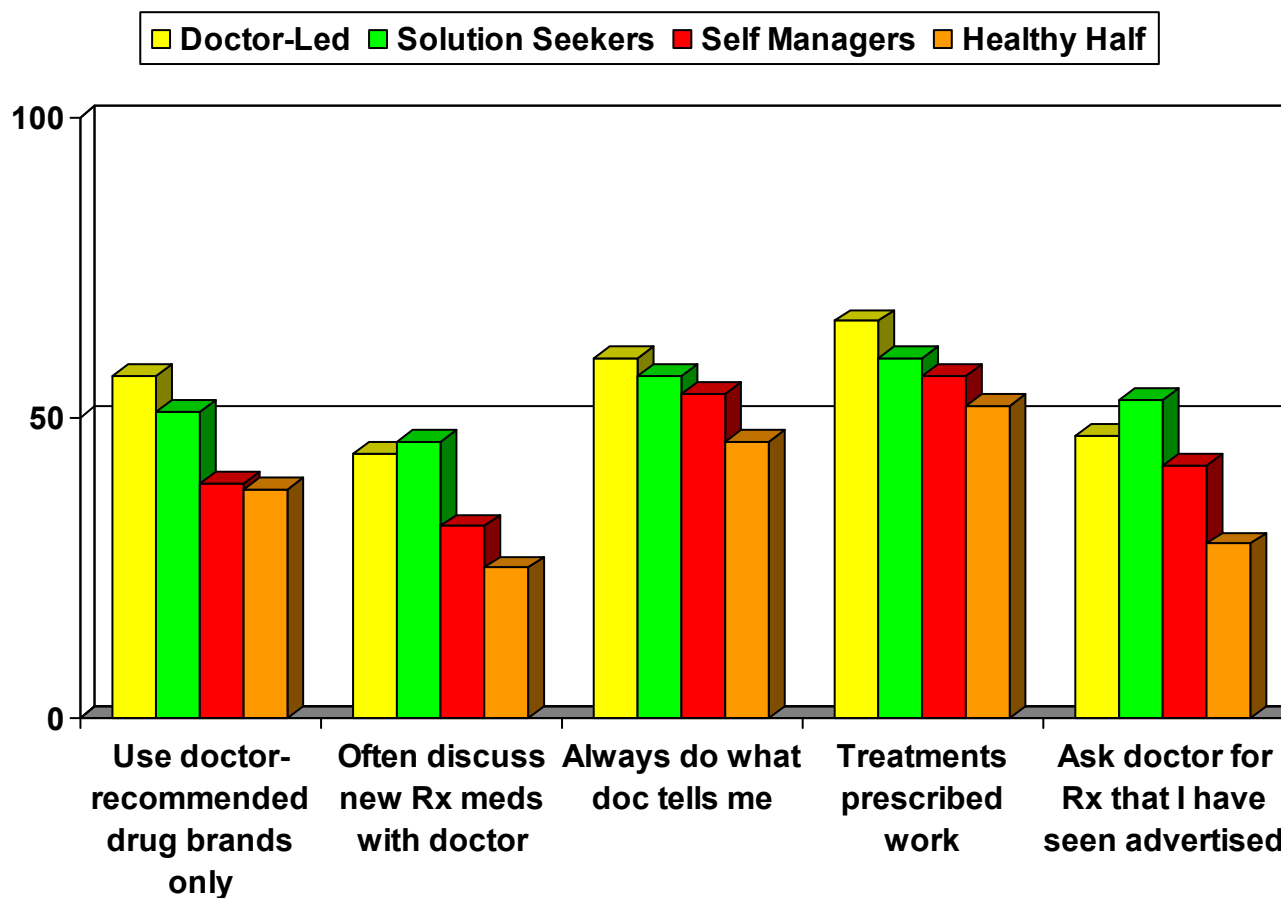
Consumer segmentation



- MARS OTC/DTC Study
- 21,000 consumer respondents projected to be representative of total US population
- Study measures their media consumption habits
- Attitudinal/behavioral questions allow for segmentation into 4 broad classifications

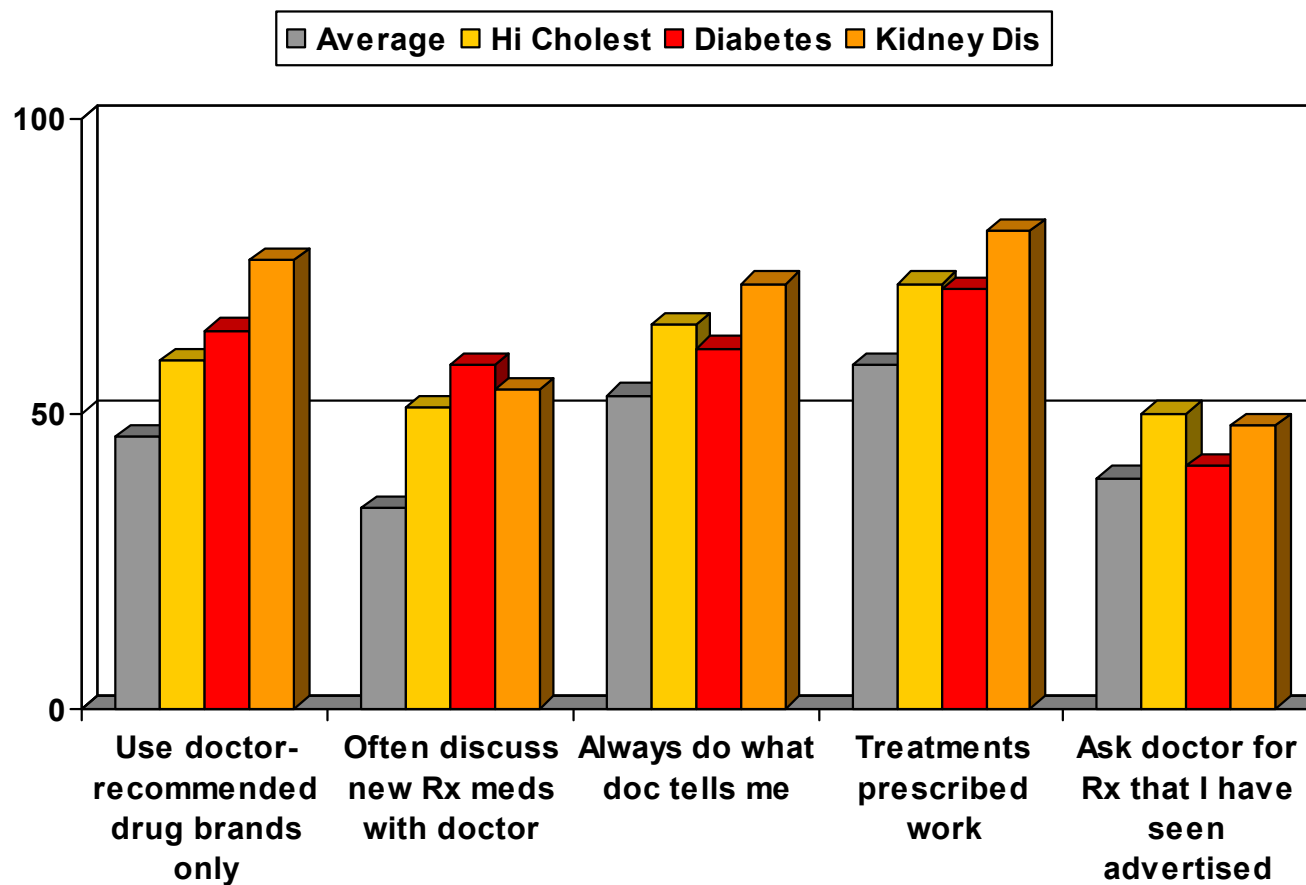
Source: Kantar Media, MARS Consumer Health – [MARS OTC/DTC Study](#)

Among all consumers, “doctor-leds” and “solution seekers” rely heavily on doctors (and “healthy half” don’t need to)



Source: Kantar Media, MARS Consumer Health – [MARS OTC/DTC Study](#)

Among those with medical conditions, doctors increase in importance



Source: Kantar Media, MARS Consumer Health – [MARS OTC/DTC Study](#)

Multimedia Market



Kantar Media's *Sources & Interactions 2010* study

- Examines doctors' online and mobile activities, e-detailing experience, and exposure to (and evaluation of) 40 information sources/promotional tactics
- Annual study of over 3,000 physicians across 20 specialties, exploring their media preferences and habits
- Study conducted Q1-Q2 2010, by mail and online, with a representative sample covering both hospital and office-based US doctors

(The following slides summarize key findings from this study)

Doctors are digital

- 95% use the Internet for professional purposes
- 53% use a smartphone for professional purposes
- 45% use social networking sites
- 29% communicate with their clients using email
- 3% use Twitter

Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

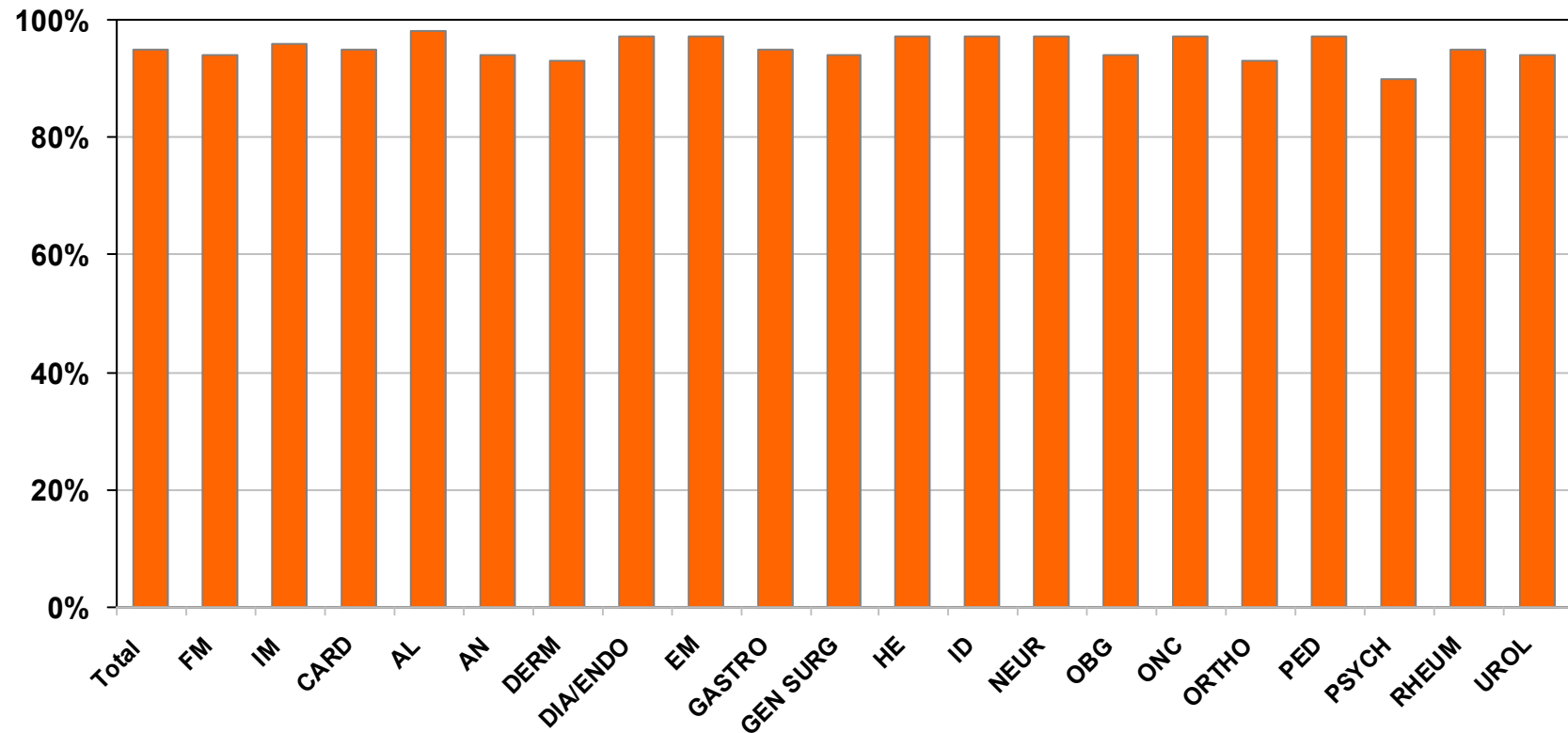
Tasks performed: desktop/laptop computer

Primary tasks performed

- Access Internet
- email
- Research General Medical Topics/Issues
- Research Specific Clinical Situations
- Complete CME
- Reference Drug Data
- Read Abstracts
- Interactive Learning
- Read Articles from Medical Publications
- Professional News Updates

Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Internet use for professional purposes



Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

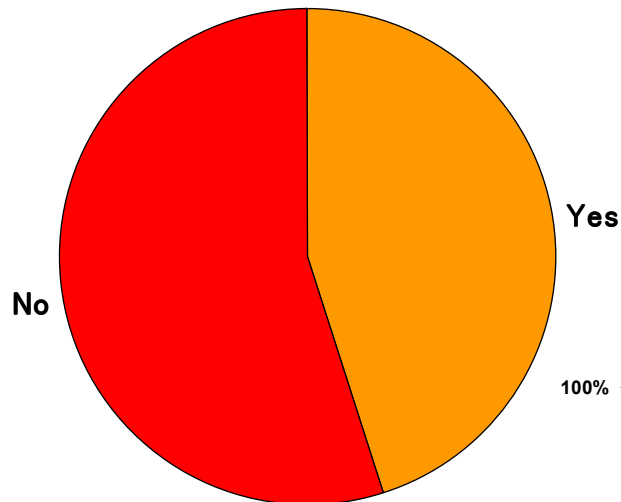
Internet use for professional purposes

- Internet used 10.8 times per week
 - Range 8.45 – 14.14 depending on specialty
 - Younger doctors more active users (8.52 – 13.31 range)
- Time spent per session: 18.54 minutes
 - Range: 15.22 – 22.64 minutes depending on specialty
 - Older doctors spend more time (17.83-19.72 range)

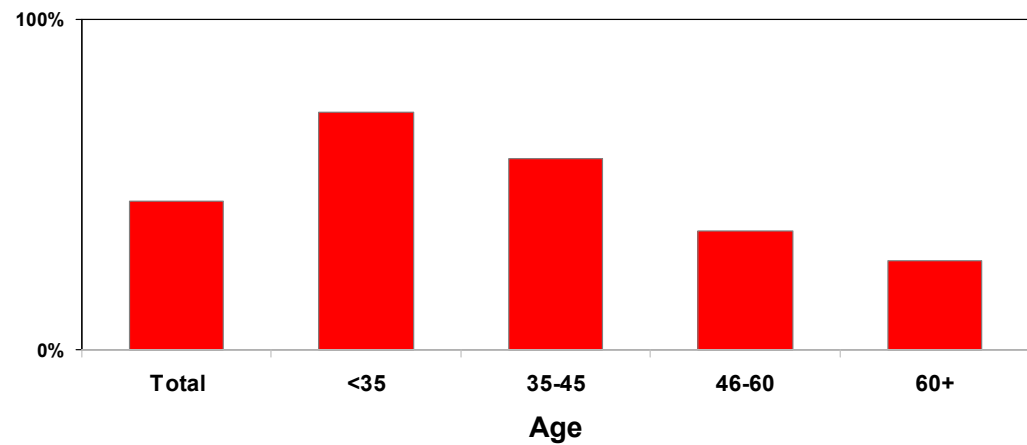
Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Social media is emerging, especially among younger doctors

Use of Social Networking Sites

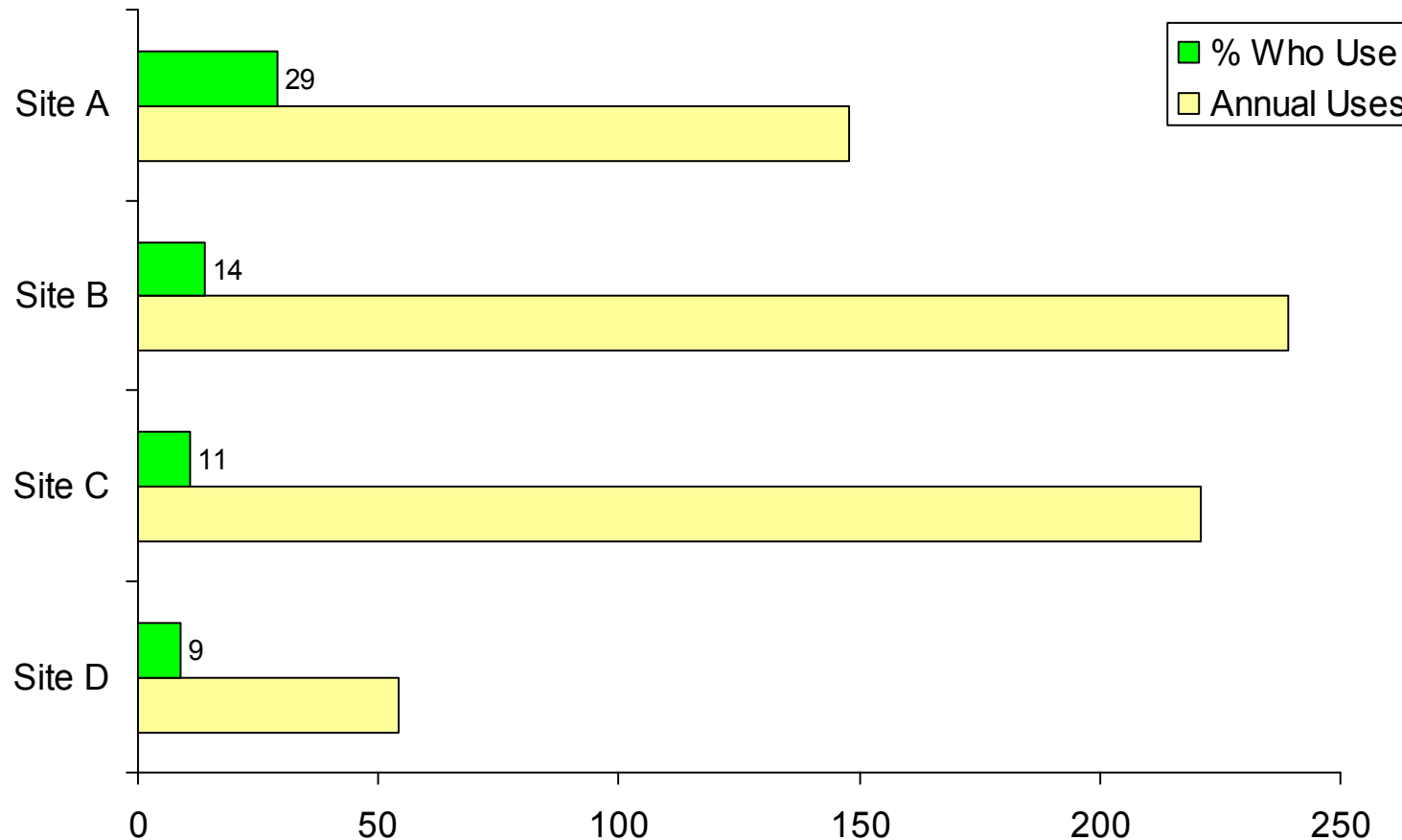


Use of Social Networking Sites



Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Individual social media sites: small user base, frequent use

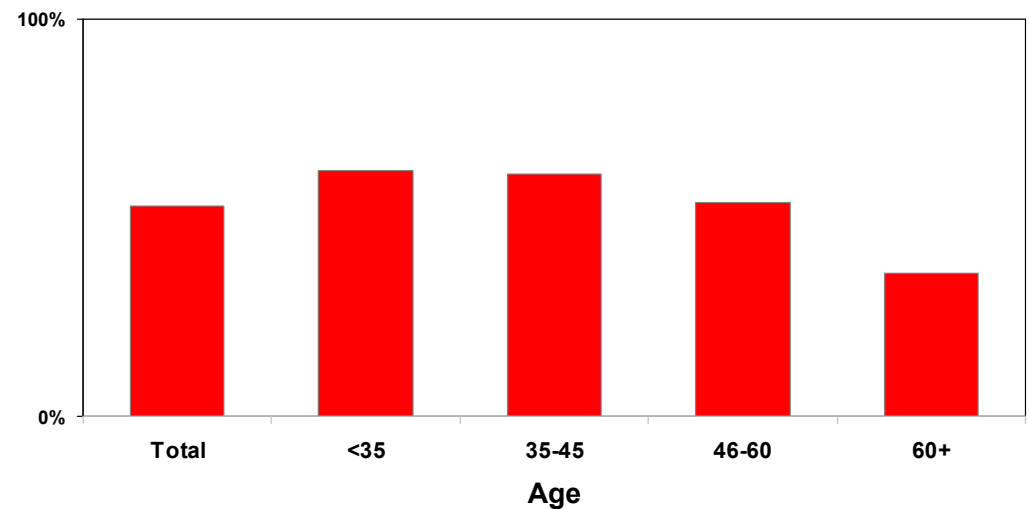
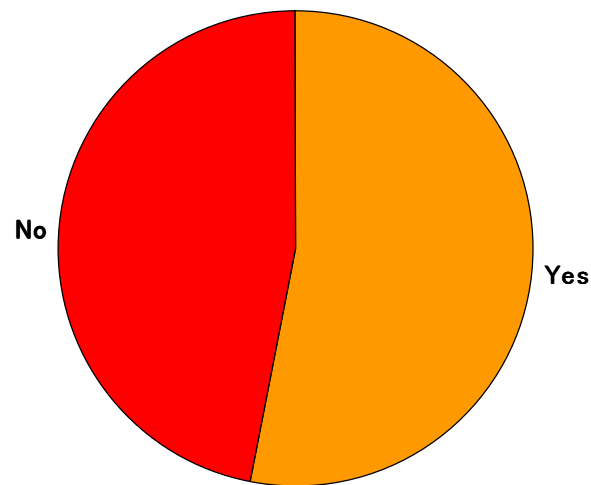


Source: Kantar Media – Preliminary Data on the 4 leading social media sites for doctors, 2011 NonJournal Media Study

Smartphone use for professional purposes

72% say their smartphone use has increased in the past year

Use smartphone for professional purposes



Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Tasks performed: smartphone

Primary tasks performed

- Access Internet
- email
- Find/Perform Clinical Calculations
- Reference Drug Data
- Make Prescribing Decisions
- Check Formulary Status
- Peer to Peer Social Networking
- Professional News Updates
- Research General Medical Issues/Topics
- Research Specific Clinical Situations

Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Kantar Media's *Sources & Interactions 2010* study

- A key component of the *Sources & Interactions 2010* study is the analysis of 40 information sources/promotional tactics to which physicians are exposed in their practice.
 - In this study, we examine categories of information sources as opposed to specific sources (so Pharma Sales Reps not Company X Sales Reps; Medical Journals: Accessed Online not TheJournalOfXYZ.com)
- Doctors are asked to:
 - Rate each Source in helping them stay abreast of new medical developments
 - Indicate how frequently, if at all, they're exposed to each source
- The total percentage of doctors exposed to a source is the **Reach** for that source
- **Exposures** is an annualized number for exposures to that type of information source
 - (note: this is not the same as "ad exposures" or "ad impressions", metrics dependent on number and type of ads run in a specific media property or properties, and the readership or site activity for that particular property)
- **Importance** can be viewed in several ways; typically top 2 on a 5 point scale is considered "Important"

Promotional tactics/sources of information studied

CME: Attendance at Meetings

CME: Audio/Video via CD or DVD or TV

CME: Printed Courses

CME: Webcasts/Podcasts

Colleagues

Conferences/Symposia on a Product or Therapy: Attendance at Meetings

Conferences/Symposia on a Product or Therapy: e-conferences

Convention Attendance

Dinner Meetings

Grand Rounds/Speaker Programs

Pharma Medical Liaisons

Pharma Sales Representatives

e-detailing

Faxed Information

Government Bulletins/Literature: Printed

Government Bulletins/Literature: Online

Medical Center/University Newsletters: Printed

Medical Center/University Newsletters: Online

Other Medical Newsletters: Printed

Other Medical Newsletters: Online

Pharma Company Mailings: Printed

Pharma Company Mailings: Online

Consumer News Sites: Online

Medical Webcasts/Podcasts (non-CME)

Physician-Requested Television Network

Physician-Targeted Radio Programming

Websites: Company/Product Site

Websites: Medical Society Site - Local

Websites: Medical Society Site - National

Websites: Disease Site - Focused on Medical Professionals

Websites: Disease Site - Focused on Consumers/Sufferers

Medical Journals: Accessed Online

Medical Journals: Accessed via Print

Medical Journals: Reprints - Printed

Medical Journals: Reprints - Online

Reference Publications: Printed

Reference Publications: Online

Physician-Targeted Poster

Patient Record Forms

Prescription Pads

Among 40 print, digital and in-person information sources:

Reach

- 18 sources reach over $\frac{3}{4}$ of the market
- 7 reach $< \frac{1}{2}$

Frequency

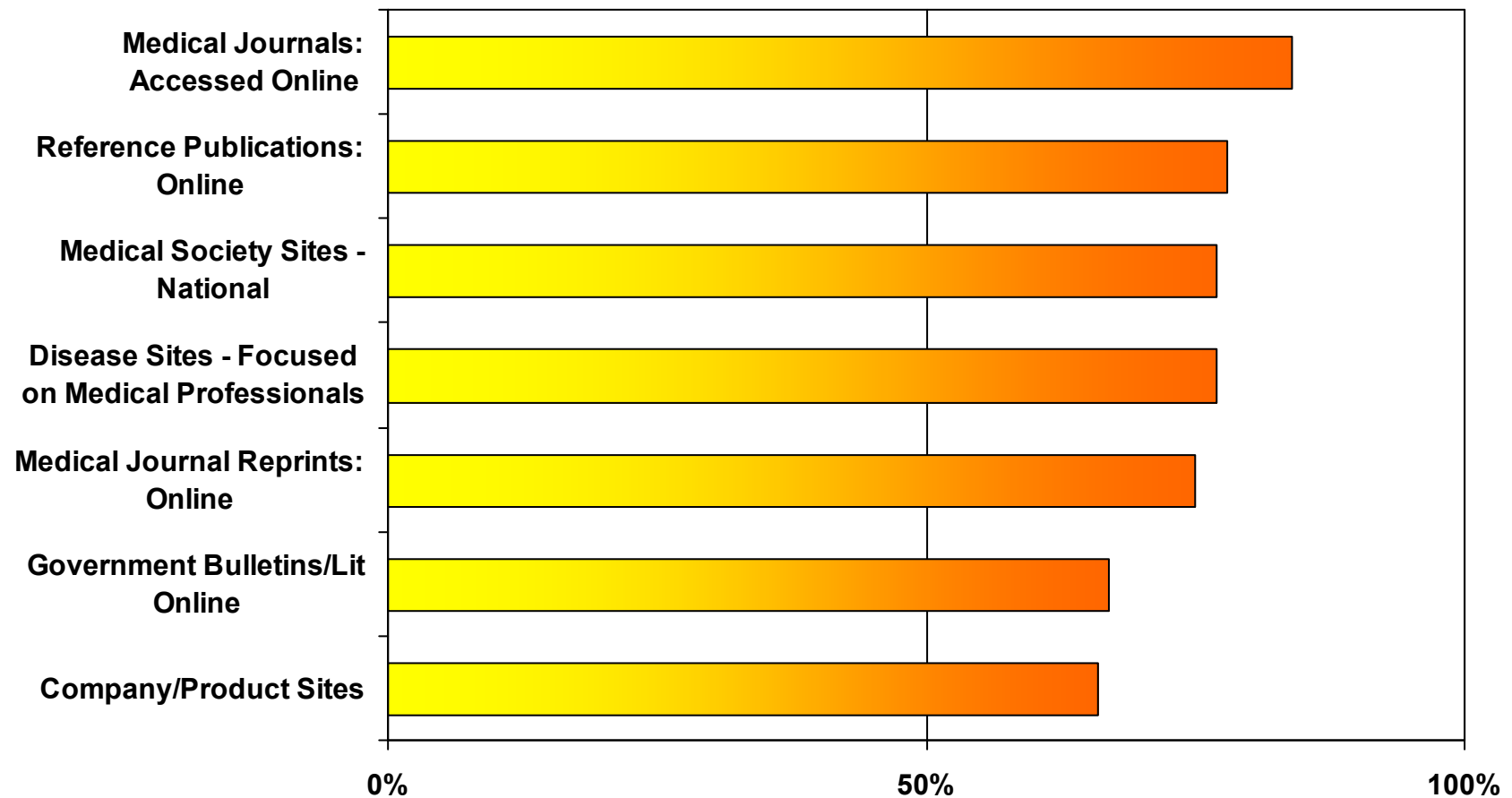
- 9 deliver weekly or more frequent exposure
- 5 offer $<$ monthly exposure

Importance

- 9 are rated “important” (top 2 on a 5 point scale) for keeping physicians abreast of new medical developments
- 16 receive high importance ratings from less than a quarter of all doctors

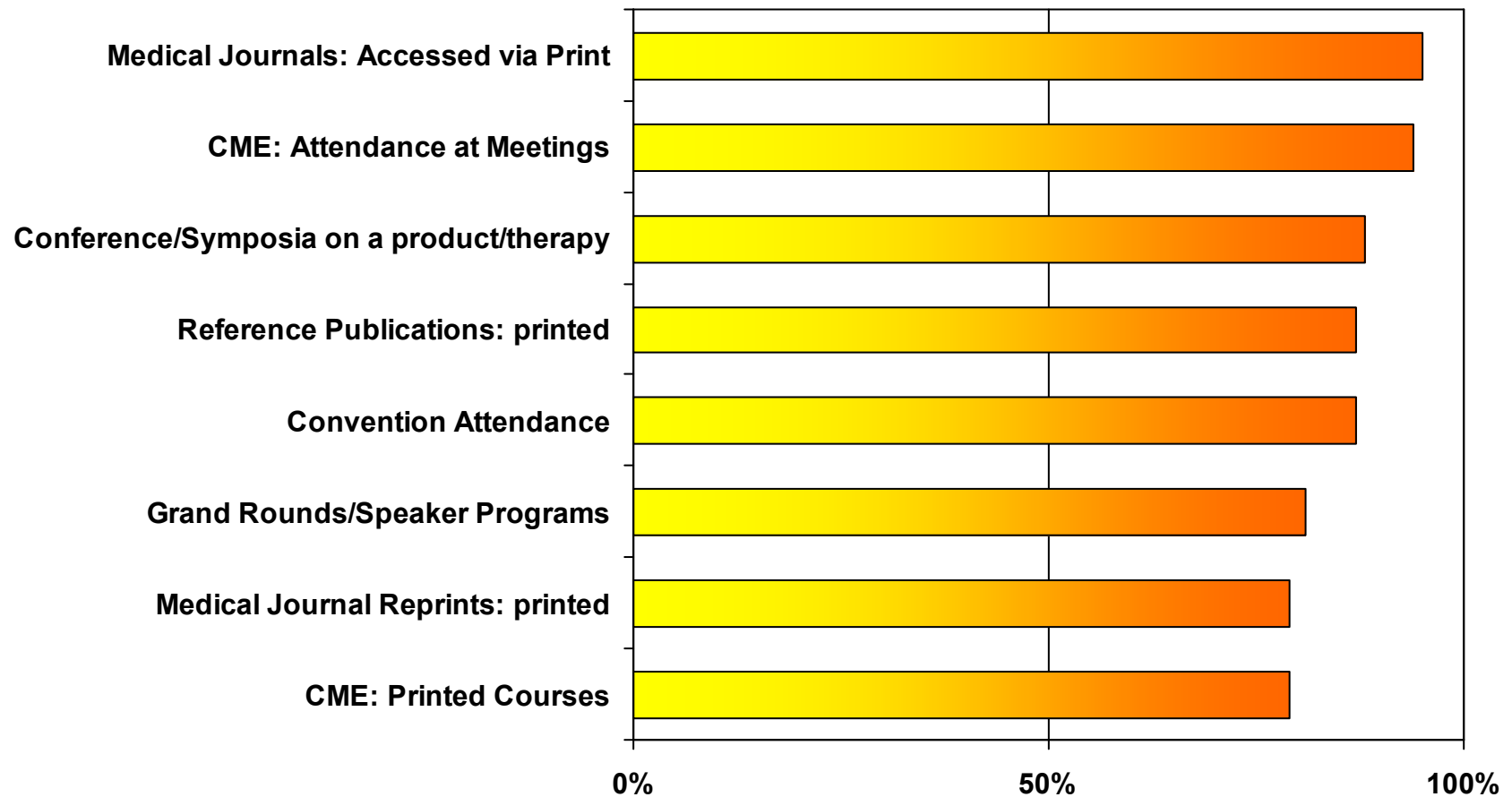
Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Top online sources: reach



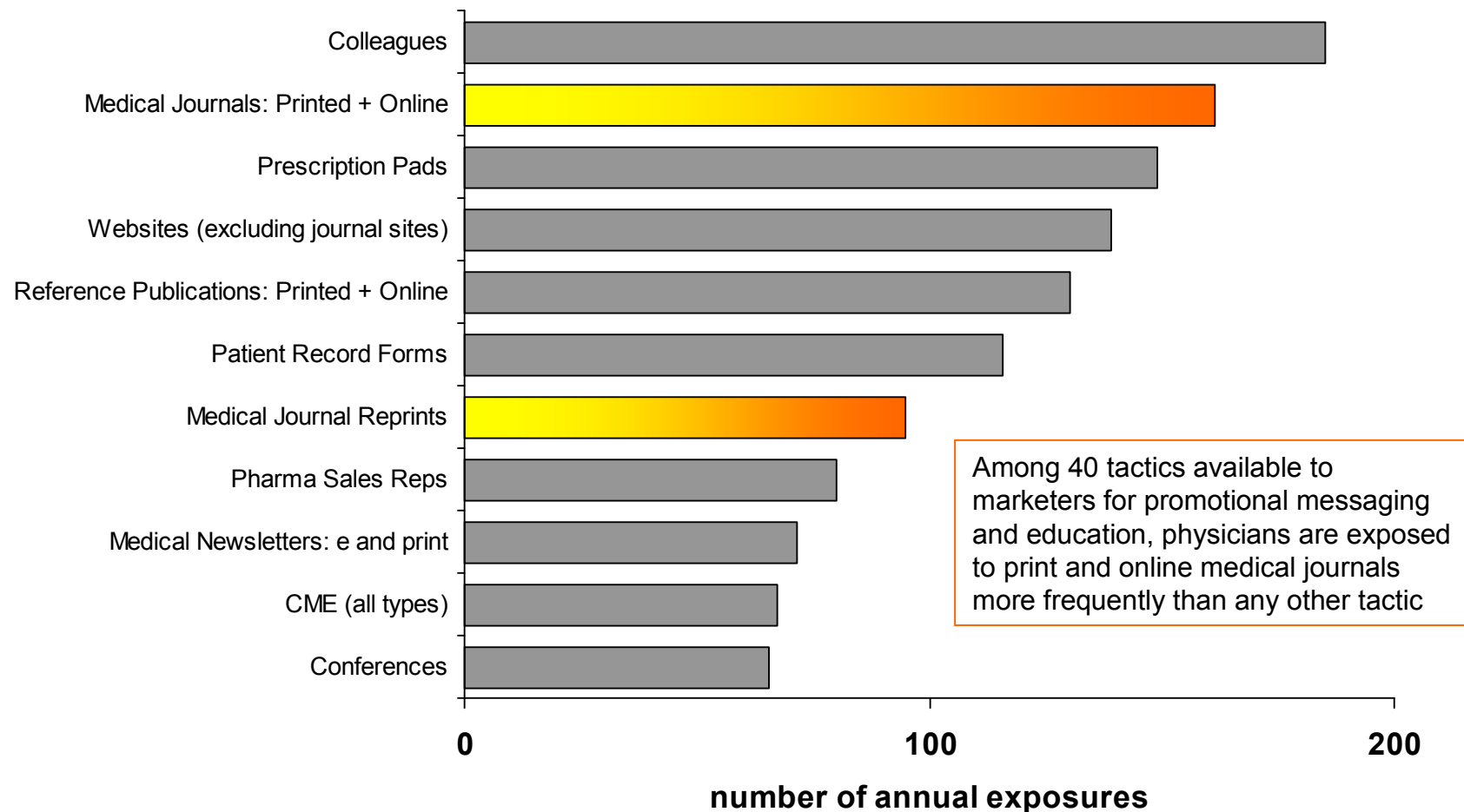
Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Top offline sources: reach



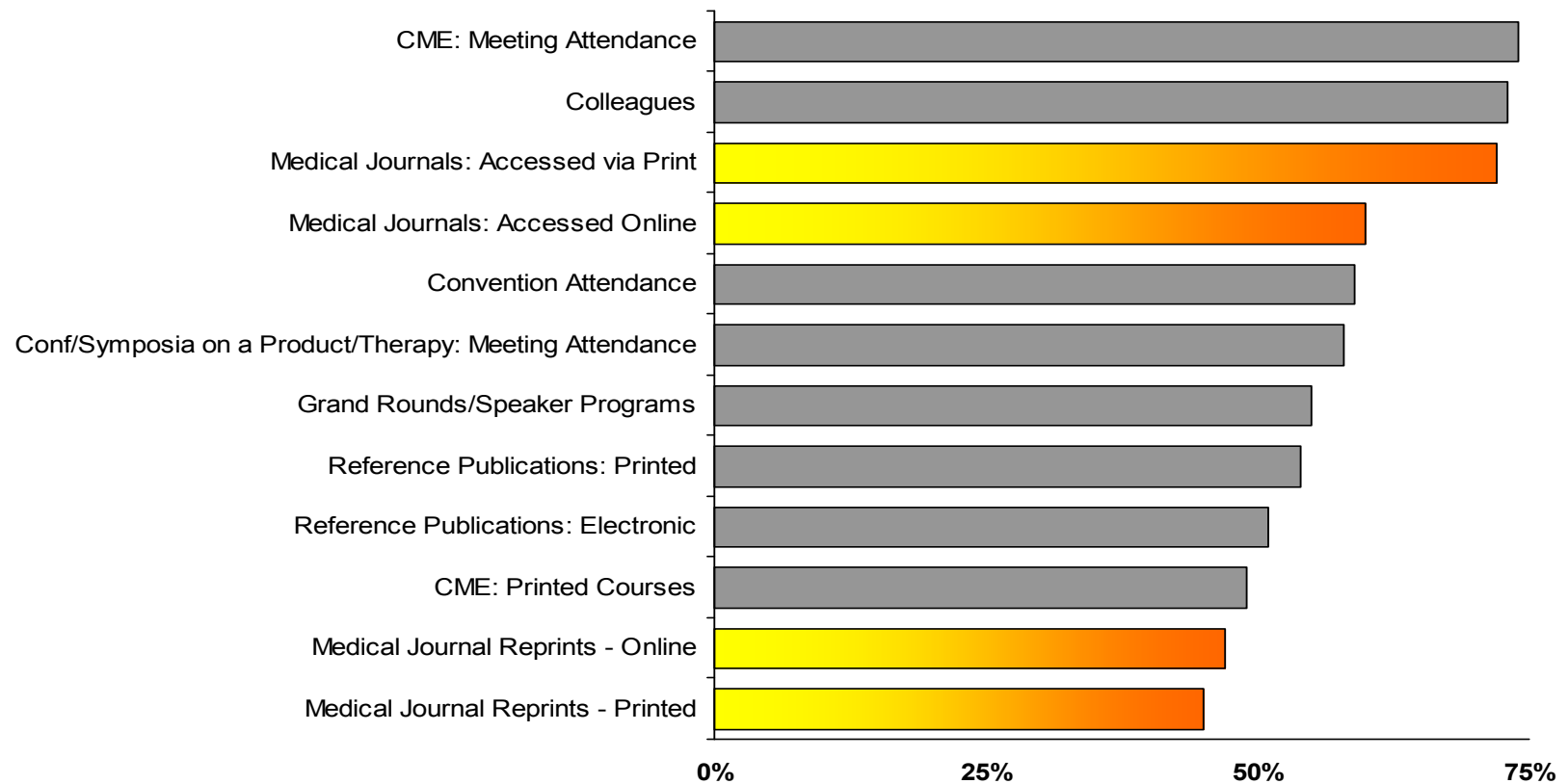
Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Medical journal brands offer more annual exposures



Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Physicians rate medical journal brands among their most important sources of information



Percent of physicians rating source a 4 or 5 on 5 point importance scale for keeping them abreast of new medical developments

Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Which sources are the best?

- In practice, it depends on communication goals and cost
- In general, we *can* compare sources across all three metrics by calculating a composite score:

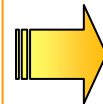
Metrics

- Reach, Exposures, Importance (Top 2)

Ranked from highest to lowest

- Highest third for each metric get a value of “3”
- Middle third get a value of “2”
- Lowest third get a value of “1”

Highest theoretical composite score is 9,
lowest is 3



| | Reach | Exposures | Importance |
|--------|-------|-----------|------------|
| High | 3 | 3 | 3 |
| Medium | 2 | 2 | 2 |
| Low | 1 | 1 | 1 |

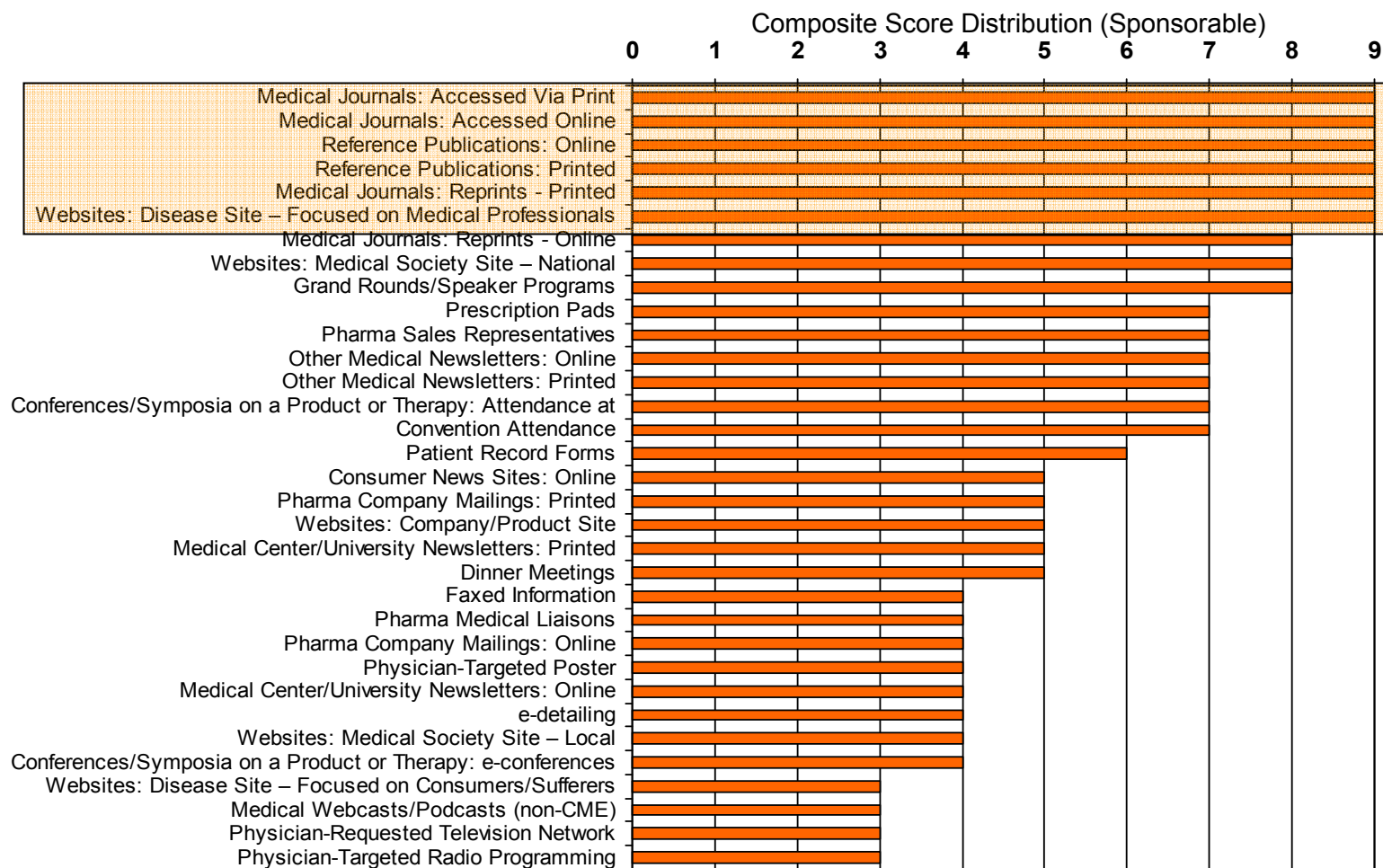
Composite score example

An information source/promotional tactic that fell in the middle third of scores in both reach and exposure, and the top tier in importance, would earn a composite score of “7”

Composite Score = 7

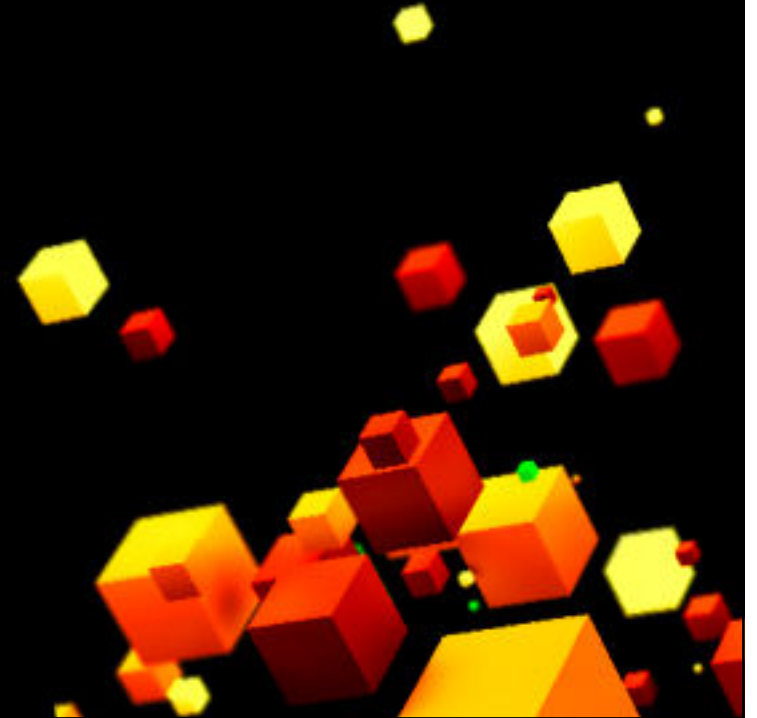
| | Reach | Exposures | Importance |
|--------|-------|-----------|------------|
| High | 3 | 3 | 3 |
| Medium | 2 | 2 | 2 |
| Low | 1 | 1 | 1 |

Journals & reference publications, in print and online, dominate the “most effective” information sources list



Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Journals still matter

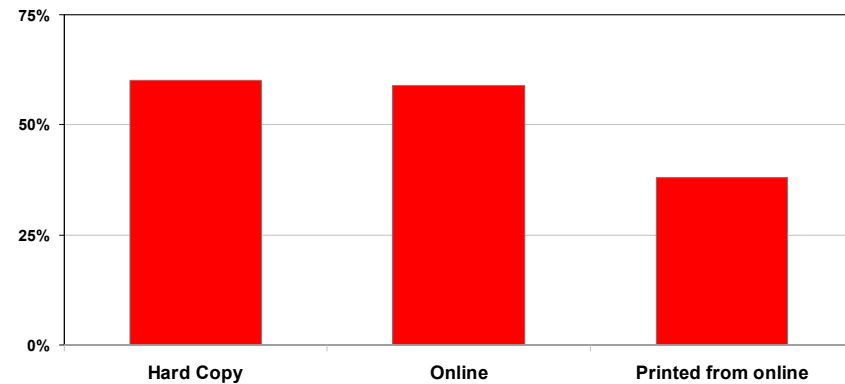


Journal trends

Sources & Interactions 2010

- Print journal penetration remains largely unsurpassed
- Reach and exposure levels for online journal content continues to grow
- Print and online readership have more or less reached parity

How Medical Journal Content Gets Read,
When Available in Both Formats



Source: Kantar Media, Professional Health – [Source & Interactions 2010](#)

Journal trends

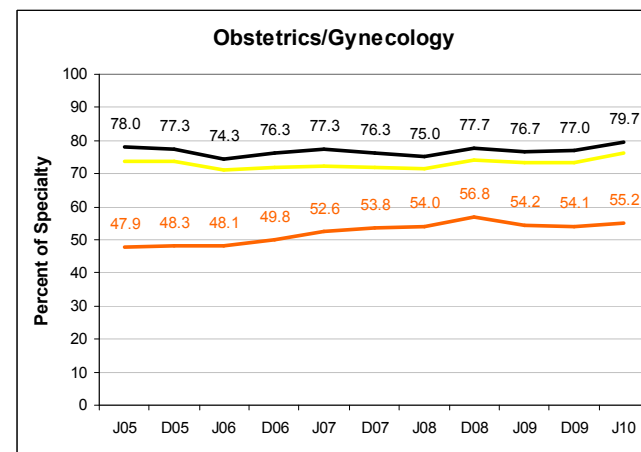
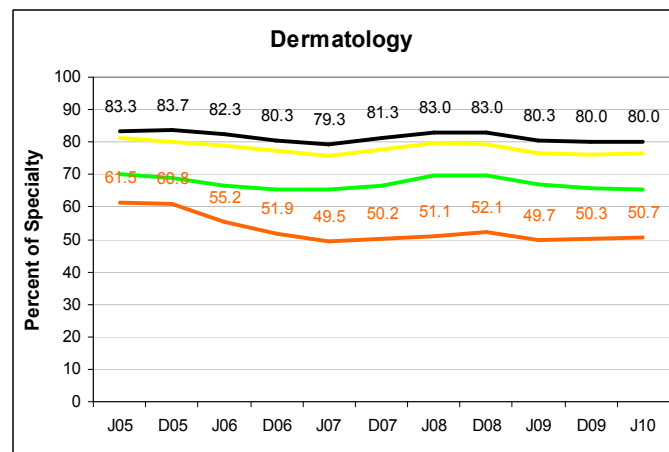
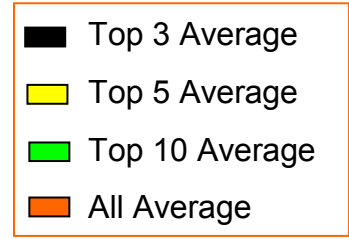
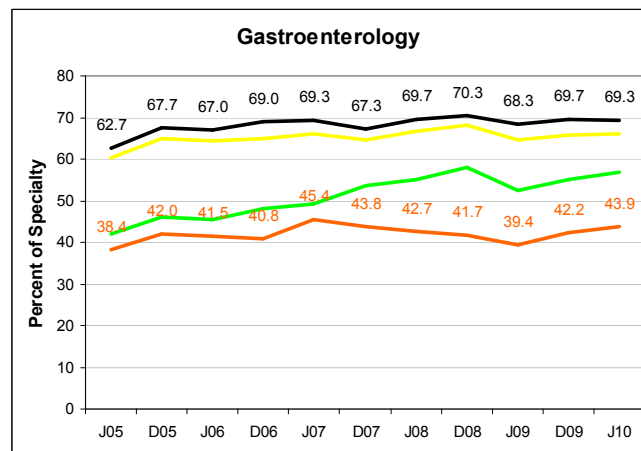
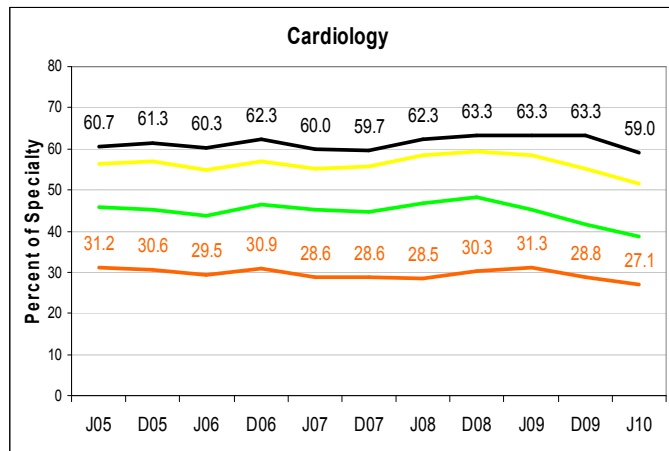
Syndicated readership studies document journal readership stability

- Readership levels do not show a declining trend, even with the proliferation of other information sources
- An examination of Average Issue Readers (a measure of reading frequency) and Average Page Exposure (a measure of reading frequency and thoroughness) data from the past 11 study periods shows relatively constant reading patterns across multiple specialties.

(Examples follow)

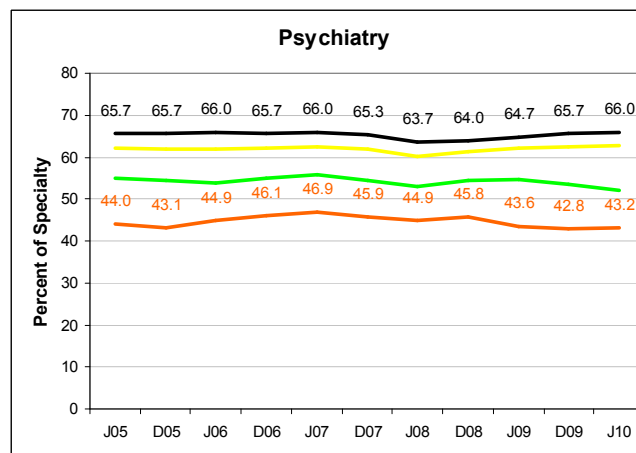
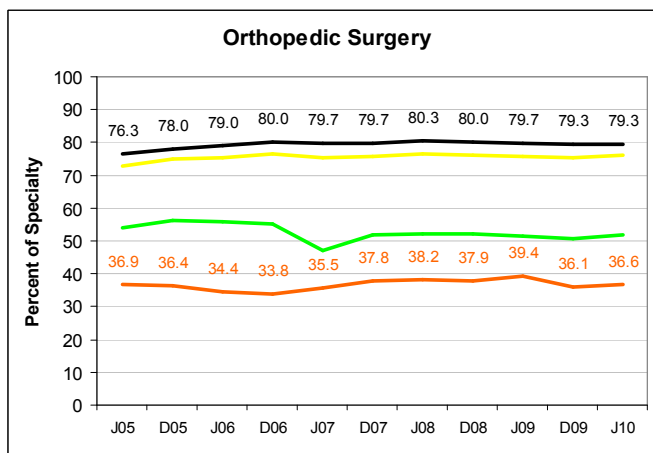
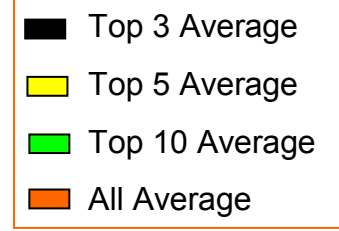
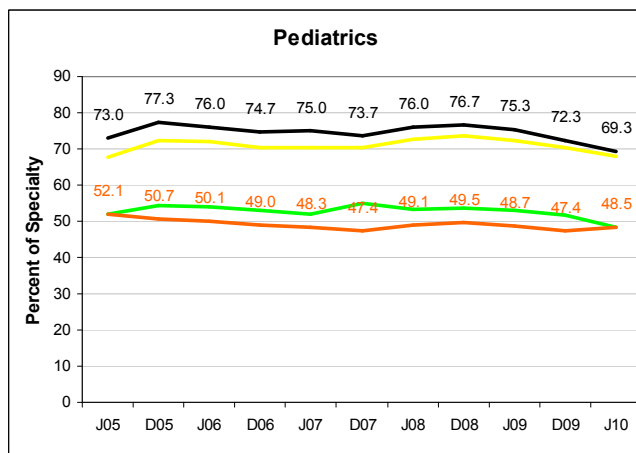
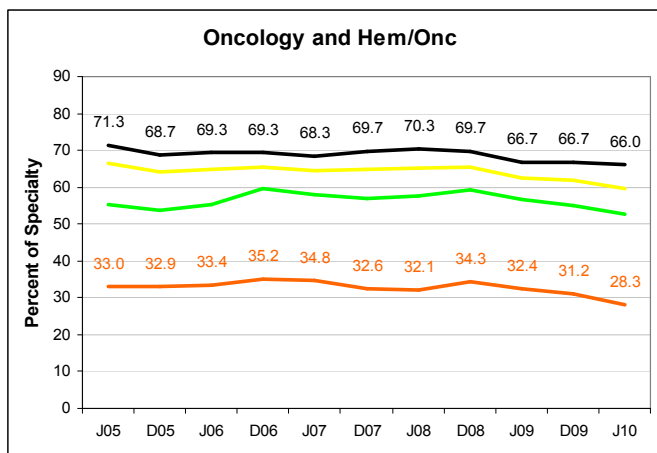
Detailed data on readership of specific journals are available in [Kantar Media's syndicated readership studies](#) covering the medical/surgical, pharmacy, managed healthcare, hospital management, eyecare, NP/PA, radiology, dental, and veterinary markets.

Average Issue Readers



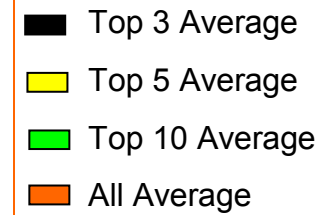
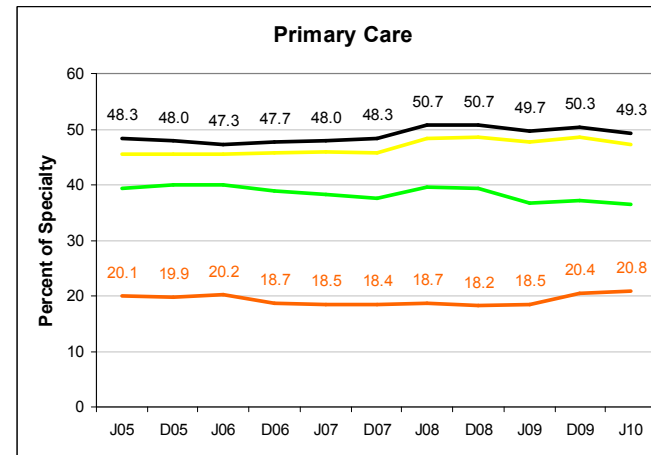
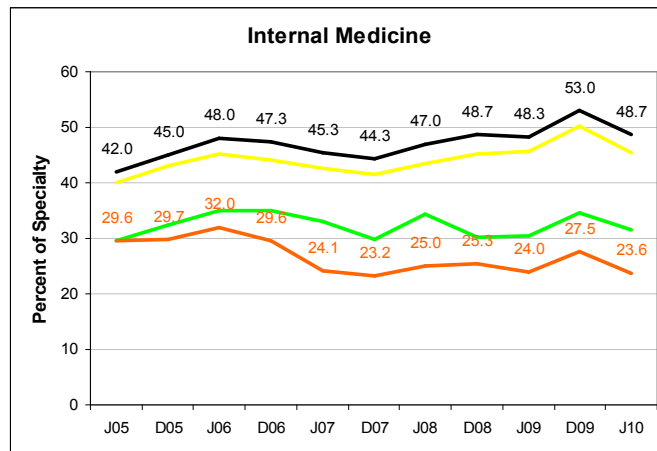
Source: Kantar Media – Medical/Surgical Readership 2005-2010

Average Issue Readers



Source: Kantar Media – Medical/Surgical Readership 2005-2010

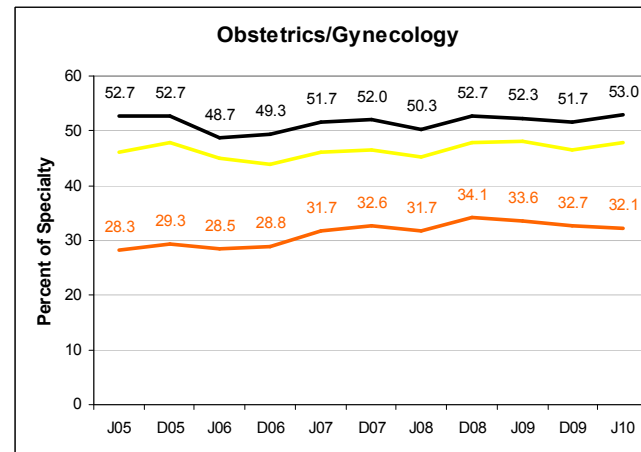
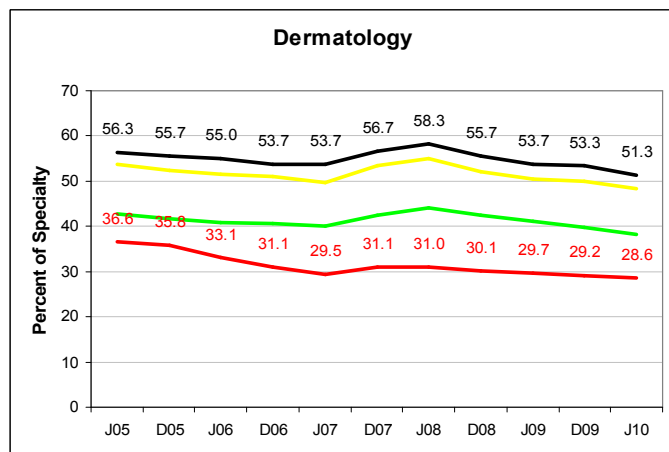
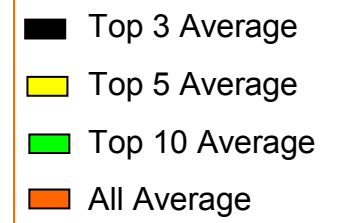
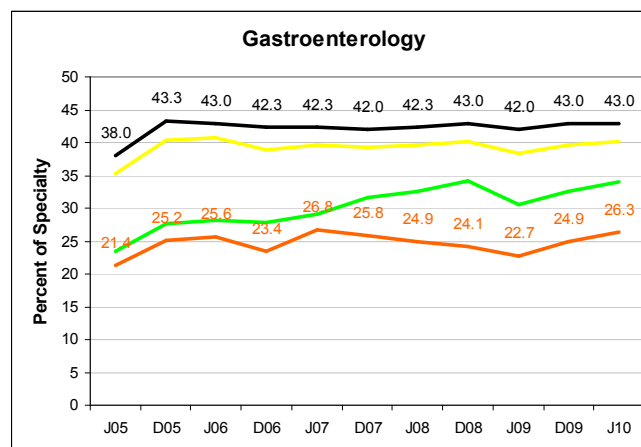
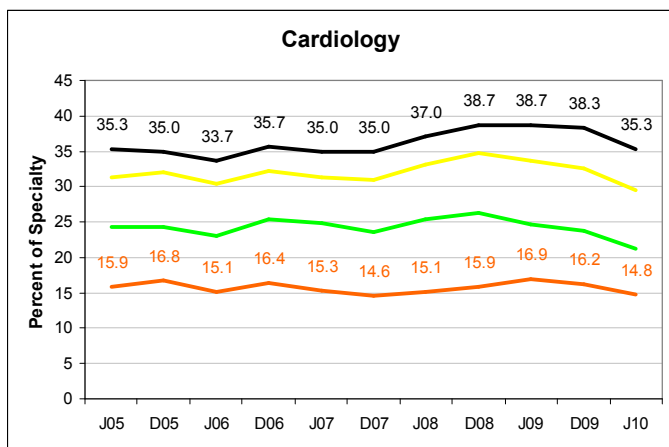
Average Issue Readers



- Small variations (up and down) from study period to study period are common, and statistically irrelevant
- Average readership for the leading publications, in particular, shows flat and in some cases even slight upward trend

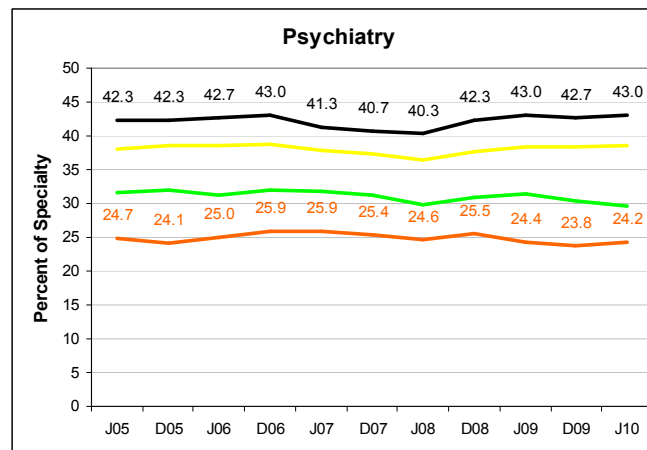
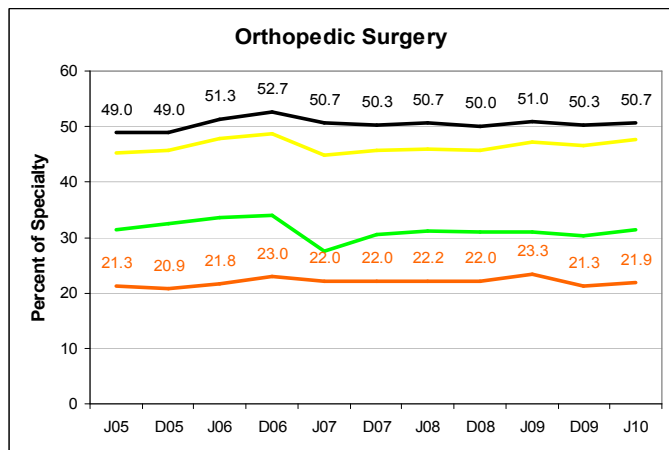
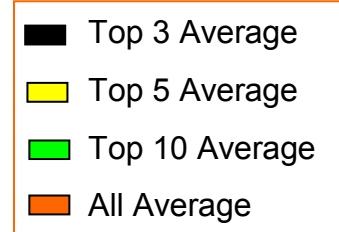
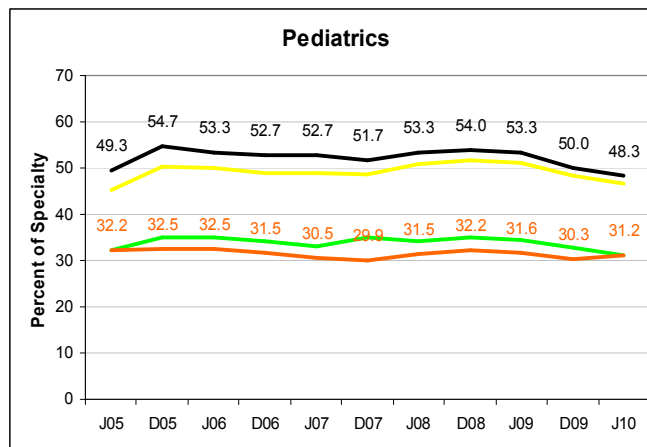
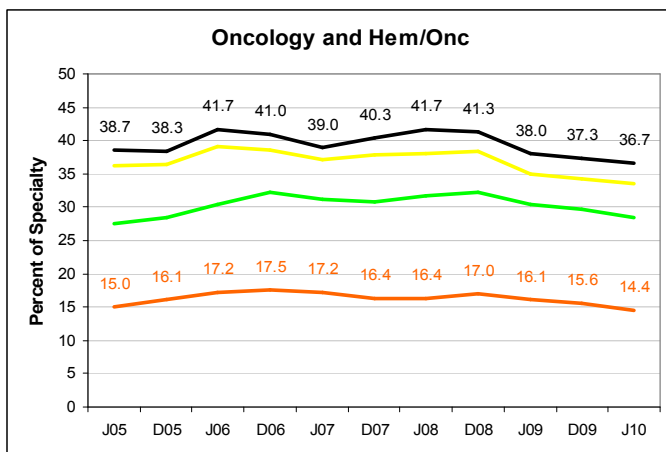
Source: Kantar Media – Medical/Surgical Readership 2005-2010

Average Page Exposures



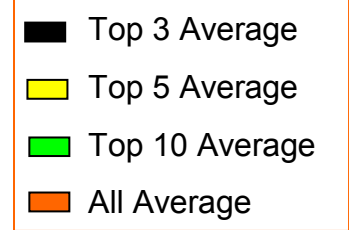
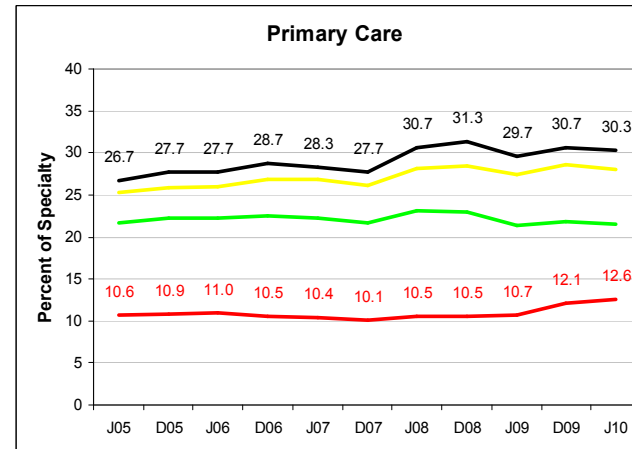
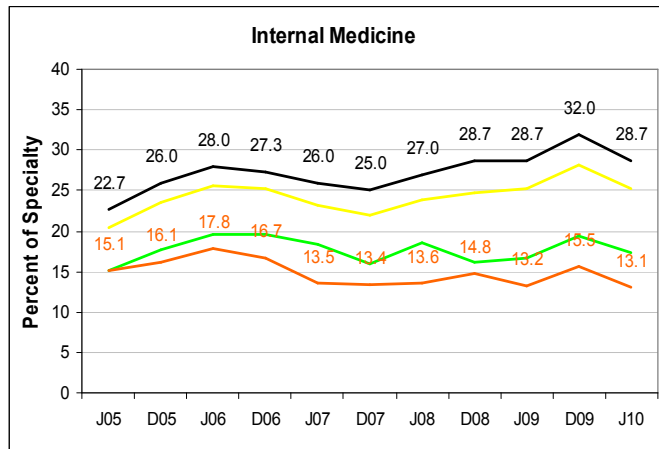
Source: Kantar Media – Medical/Surgical Readership 2005-2010

Average Page Exposures



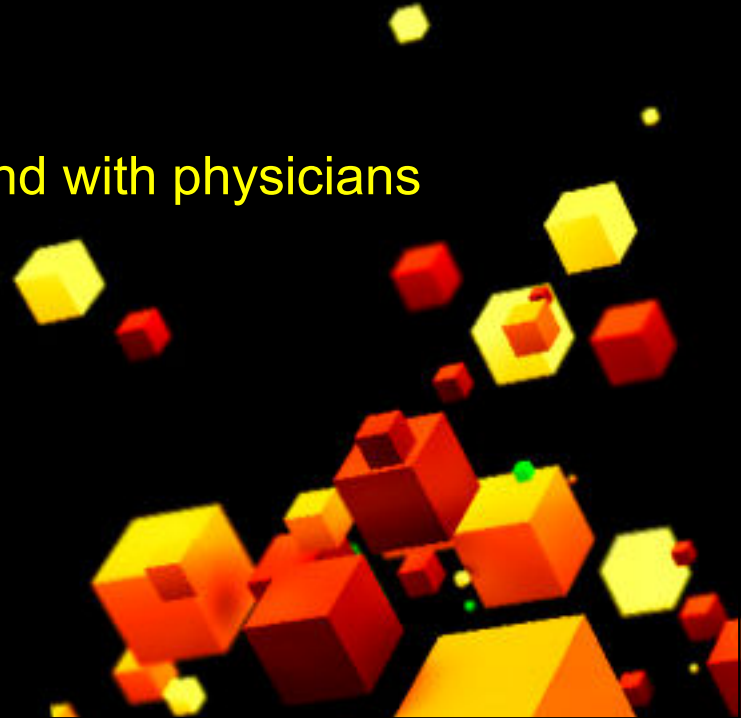
Source: Kantar Media – Medical/Surgical Readership 2005-2010

Average Page Exposures



Source: Kantar Media – Medical/Surgical Readership 2005-2010

- The inarguable fact is that readership of leading journals has not declined – with a handful of explainable exceptions – over the last 5 years
- Physicians and other healthcare professionals read leading journals (in print – and increasingly, online) as frequently and thoroughly today as in the past
- Why? In short: journals have a unique bond with physicians as a “most-trusted” source of information



Changing incorrect perceptions about medical journals

| <u>Perception</u> | <u>Reality</u> |
|--|----------------|
| Consumers drive Rx decisions | |
| Ink on paper | |
| Digital laggards | |
| If it works with consumers... | |
| Increasing physician use of internet and other digital media means journal readership is declining | |
| Digital is targeted, print is not | |



Changing incorrect perceptions about medical journals

| <u>Perception</u> | <u>Reality</u> |
|--|---|
| Consumers drive Rx decisions | Consumers still rely on their doctors |
| Ink on paper | Media neutral – utilizing whatever media platforms work best for the content & audience |
| Digital laggards | The most widely accessed sites online |
| If it works with consumers... | Doctors aren't consumers. Trust the research, not your gut. |
| Increasing physician use of internet and other digital media means journal readership is declining | Not according to the readership data. E-sources are supplementing, not replacing, print information. |
| Digital is targeted, print is not | Medical journals have always, by and large, been highly targeted and use is "opt in". The media platform doesn't matter in this case. |

- Journals offer the single most effective medium in the current marketplace
- Journal websites already lead in the digital space
- Change creates opportunity:
 - for publishers, to leverage their audience and content across multiple existing and emerging media platforms, and in doing so to best meet the market's information needs
 - For marketers and their agencies, to capitalize on the reach, exposure potential and unique bond between doctors and medical journals in both print and digital environments, to cost-effectively build the foundation for any effective promotional campaign





Contact us:

www.KantarMediaNA.com/healthcare

Marketers, Media Inquiries

Dave Emery

847.375.5071

dave.emery@kantarmedia.com

Agencies

Bernadette Cognac

312.543.7078

bernadette.cognac@kantarmedia.com

Media Owners (Northeast/Midwest)

Jaime Brewster

917.716.3963

jaime.brewster@kantarmedia.com

Media Owners (Mid-Atlantic/Southeast/West Coast)

Alejandro Alvarez

609.462.9883

alejandro.alvarez@kantarmedia.com

