



THE SOCIAL *Check-up*

September

2016

THE SOCIAL CHECK-UP

HOW IS PHARMA USING SOCIAL MEDIA?

Over the past decade, the rise of social media has caused a huge shift in the way businesses interact with their customers. Even pharma, a sometimes cautious industry when it comes to social, is starting its own conversations online and learning how to work within regulatory and compliance boundaries to reach a wide audience including patients and healthcare professionals.

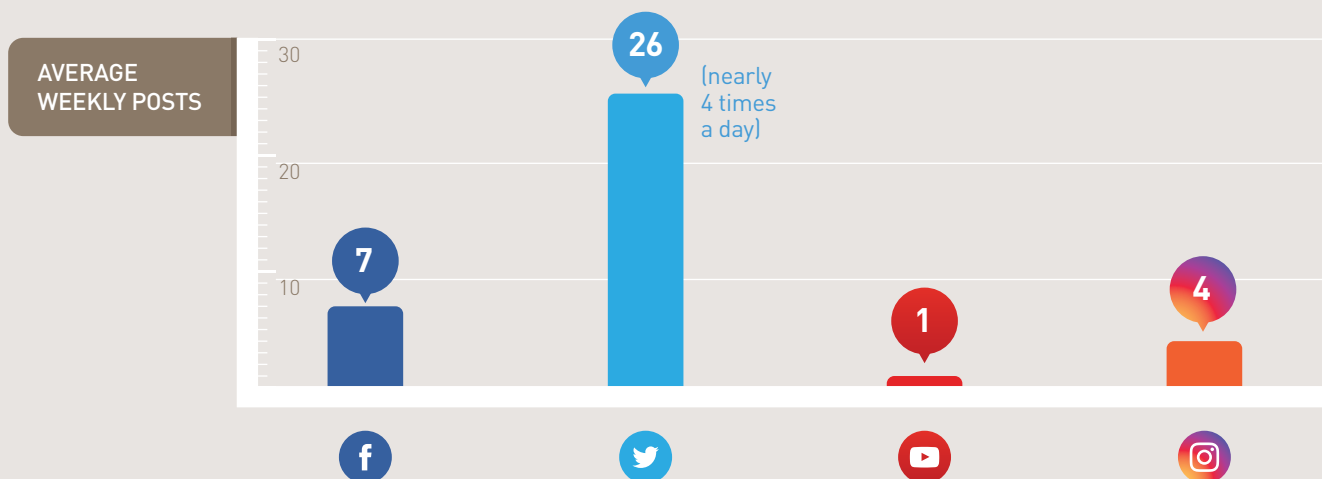
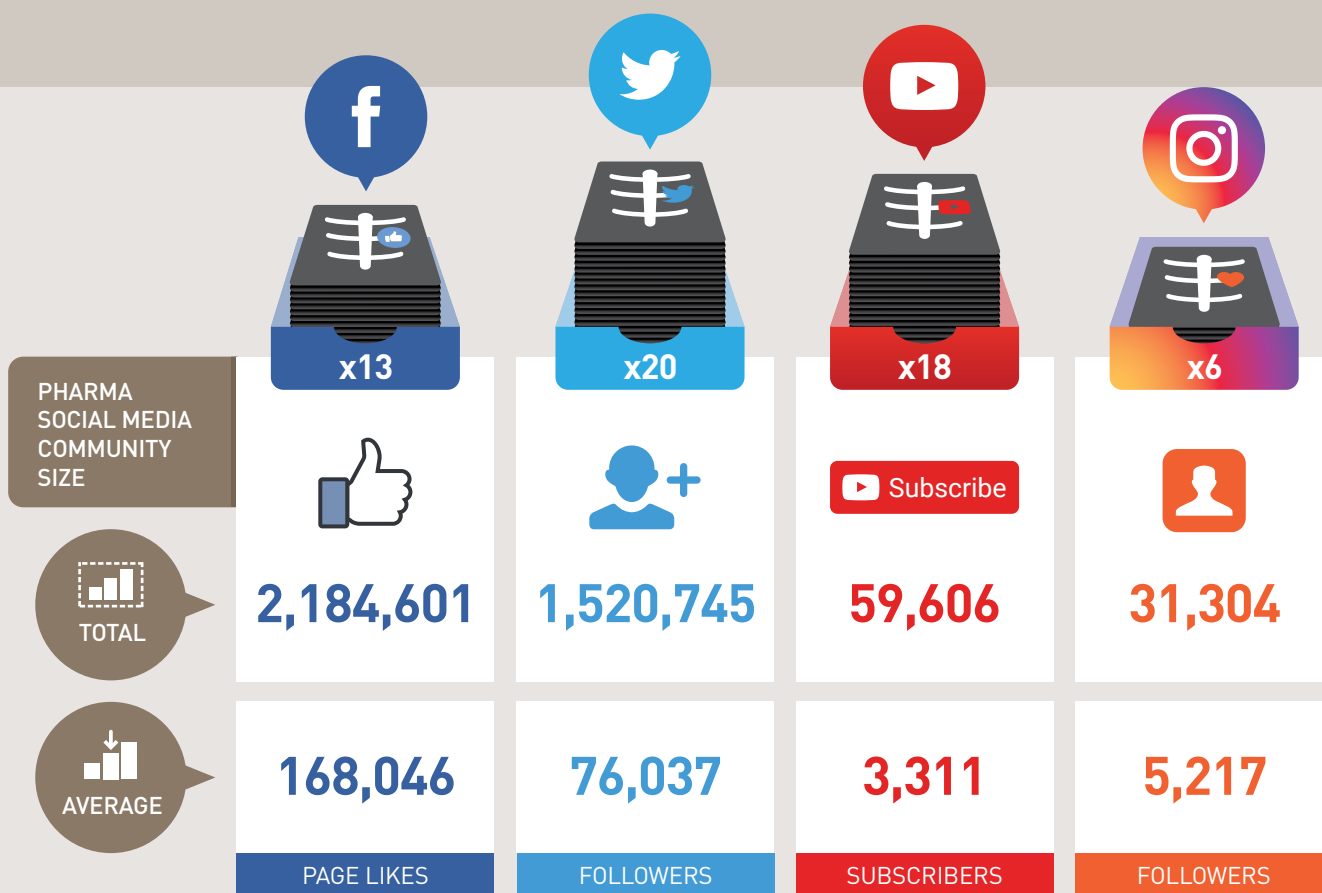
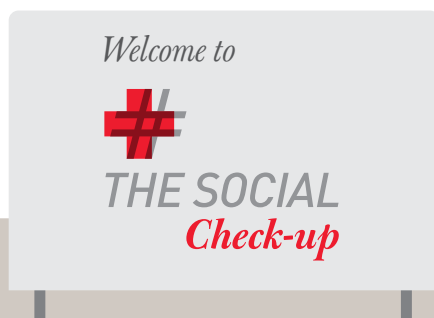
It's no longer the sole goal of social marketers to cultivate the brand with the biggest following; increasingly, the provision of quality content is taking precedence. Yet how the content translates into user engagement, in the form of retweets, likes and shares, is what will ultimately determine the channel's success.

For this edition of the *Social Check-up*, we tracked the global corporate social media activity of the top 20 pharma companies over the first half of 2016. By partnering with data specialists Pulsar, we explored how the industry is creating and using content, and whether the companies are really succeeding in engaging their audiences.

WE INVESTIGATED

- *How to address the balance between **created and curated** content?*
- *What **forms of content** are proving most popular with pharma audiences?*
- *How **engaging** is the content published by pharma companies?*
- *What does the future hold for **pharma and social media**?*

We studied the corporate social media activity of the world's **TOP 20 PHARMA COMPANIES** covering **57 SOCIAL NETWORK PROFILES** over the first half of 2016



CREATED VS. CURATED CONTENT

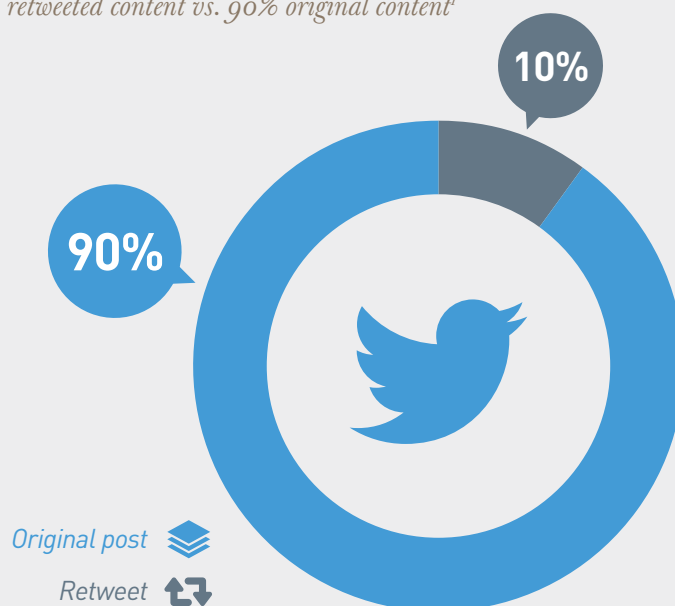
ADDRESSING THE BALANCE BETWEEN CREATED AND CURATED CONTENT

Social media offers a platform for publishers to share content that already exists on the web, as well as create new content from scratch. Through curating (e.g. retweeting and sharing) relevant posts, pharma companies can show that they are not just trying to push out their own corporate messages, but have a genuine passion for, and interest in, the subjects that they advocate.

In our study, **original content dominated**, but pharma companies should feel confident in retweeting and sharing relevant posts in addition to creating new content. Retweeting shows reactivity and active engagement in social conversations. Indeed, companies such as Bayer and Allergan curated 25% and 22% of their tweets respectively, which is double the industry average.

Ultimately, it is not the number of retweets and shares, but the **quality and the relevancy** of posts that can add value. Taking the time to curate content from popular sources and known influencers for a specific audience will likely result in higher engagement. This highlights the need to stay on top of industry conversations and develop a strong understanding of the key online influencers in the pharma space.

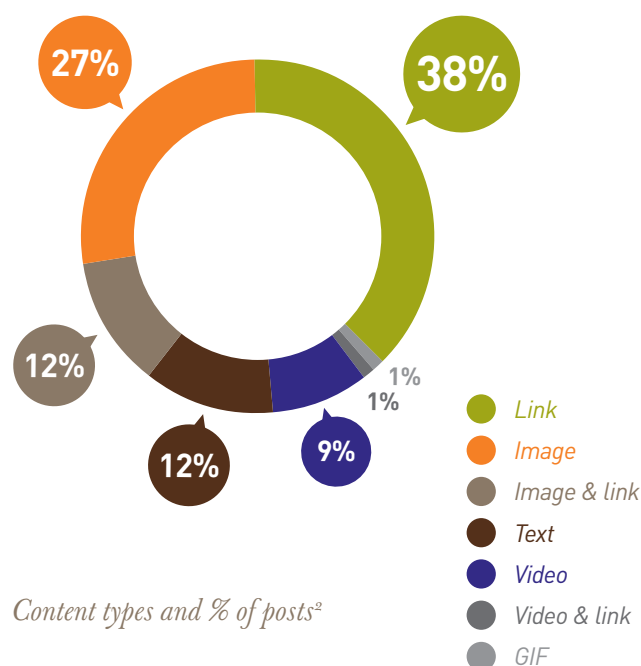
On average 10% of pharma tweets are retweeted content vs. 90% original content¹



¹. Average number of retweets vs. average original content from the top 20 pharma companies

TYPES OF CONTENT

DRIVING TO DEEPER, LONG-FORM CONTENT



Companies such as Novartis and Roche used link posts to direct users to content, such as their press releases or promotional videos.

Across Twitter and Facebook, we found that the **most common type of post from a pharma company was a 'link post'** – a tweet or Facebook post that contains a link to an external source. 'Image' and 'Image & link' posts followed in terms of popularity, with 'Videos & link' and 'GIFs' falling behind.

The preference for using links in posts demonstrates the importance of social as a tool to drive users to deeper, long-form content. Images were used in many different ways, but often the most impactful and popular were those which summed up a simple key message, or included personal photos. Images of employees were more successful, rather than stock photography, which can be perceived as too corporate or clinical.

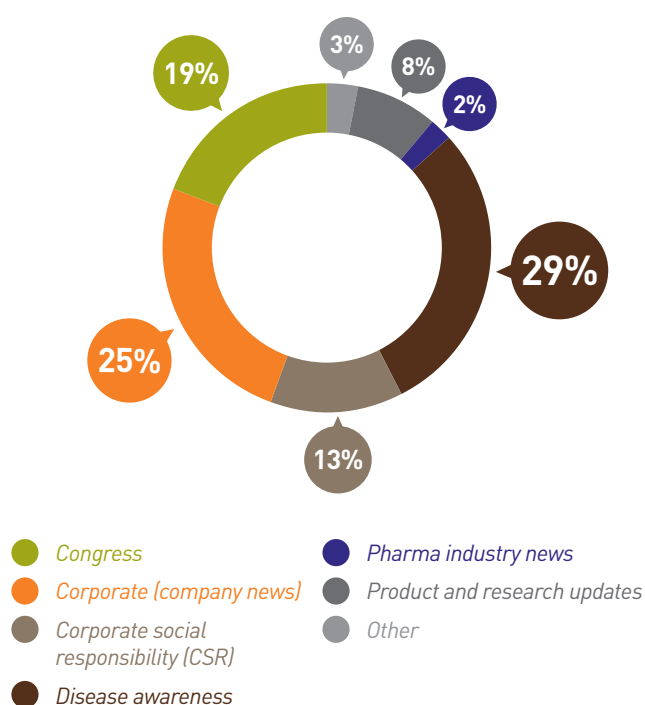
Companies such as GSK and Sanofi used personal images and original artwork to make their posts stand out.

². Based on manual coding from data collected on Pulsar CORE, a representative sample of posts from the Facebook, Twitter, Instagram and YouTube pages of the top 20 pharma companies

CONTENT THEMES

PLAYING BY THE RULES

Focusing on the content themes seen across posts on Twitter, Facebook, Instagram and YouTube, our results revealed that **‘disease awareness’ was the most common topic communicated**, closely followed by ‘corporate, company news’. As expected, restrictions around prescription product mentions has meant pharma companies are less likely to share this type of content.



This tweet from Boehringer Ingelheim works well because it clearly addresses the audience by including PRESS at the start and provides a link to further information about the clinical trial.

Content themes and % of posts³

Congress, e.g. announcing presence at an event; Corporate, e.g. announcing a merger; Corporate social responsibility, e.g. charity work; Disease awareness, e.g. a disease burden infographic; Industry news, e.g. discussion of FDA policy; Product and research updates, e.g. data announcement.

This Facebook post from Bayer effectively uses a simple animation to explain how blood coagulation works.

3. Based on manual coding from data collected on Pulsar CORE, a representative sample of posts from the Facebook, Twitter, Instagram and YouTube pages of the top 20 pharma companies

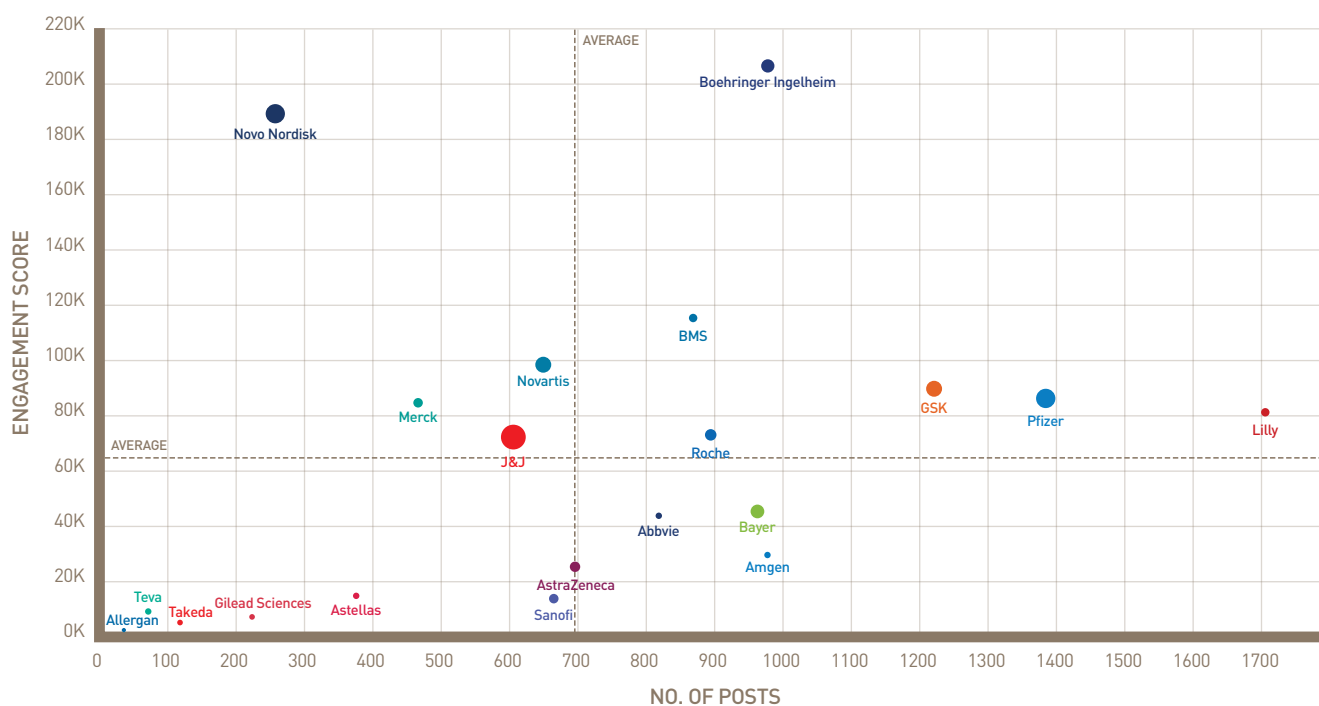
BUT WHAT USE IS CONTENT WITHOUT ENGAGEMENT?

LEVELLING THE SOCIAL MEDIA PLAYING FIELD

Whilst it was encouraging to see pharma companies sharing a broad variety of content, it would be fair to say that some companies produced more engaging content than others.

Our results have shown that companies who published the highest number of posts (e.g. GSK, Pfizer and Lilly) were not necessarily receiving the greatest engagement per post.

This graphic illustrates how companies with the largest social following (represented on the chart by the size of the circle) do not necessarily generate the most retweets, likes and shares. Social media offers a more level playing field! It is also interesting to note that, whilst a higher number of posts offers a greater number of opportunities for users to interact, this doesn't necessarily result in the greatest engagement (see the absence of data on display in the top right of the graphic).



Activity vs. engagement matrix⁴

The rise of paid social has offered companies the ability to achieve better user response rates through highly specific content targeting. It is difficult to speculate which of the pharma companies studied were using paid social strategies. This may be one of the reasons Novo Nordisk and Boehringer Ingelheim achieved significantly higher levels of engagement compared with their competitors.

4. Based on owned channel audiences and activity of the top 20 pharma companies, data taken from Jan 19th – June 19th 2016. Data collected using Pulsar CORE

BUT WHAT USE IS CONTENT WITHOUT ENGAGEMENT?

That said, whilst the incorporation of paid social can provide a lift in user engagement, the quality and saliency of the content will always be the most important factor for driving engagement.

When analysing the type of content posted compared with the engagement rate, we found that GIF posts were the least commonly distributed on social media. But they received a much better engagement rate than the more frequently distributed, but multimedia-lacking 'text' posts, which unsurprisingly had the lowest engagement rate.

| TYPE | % OF POSTS | AVERAGE ER [%] |
|----------------|------------|----------------|
| ● Video | 9% | 2.00 |
| ● Image | 27% | 1.65 |
| ● Link | 38% | 1.12 |
| ● GIF | 1% | 1.00 |
| ● Video & link | 1% | 0.82 |
| ● Image & link | 12% | 0.78 |
| ● Text | 12% | 0.32 |

Content type vs. engagement rate⁵

This video post from Pfizer is highly emotive; it tells a real-life story about a cancer patient and a researcher who is developing drugs to treat similar patients.

This GIF post by Merck may have received high engagement because it is eye-catching, uses simple messaging and includes relevant hashtags.

5. Based on manual coding from data collected on Pulsar CORE, a representative sample of posts from the Facebook, Twitter, Instagram and YouTube pages of the top 20 pharma companies

BUT WHAT USE IS CONTENT WITHOUT ENGAGEMENT?

Although disease awareness posts were the most commonly distributed by the top 20 pharma companies, their **audiences preferred to interact with corporate, CSR, product and congress-related content.**

Overall, this emphasises the need for companies to be aware of their audiences, ensuring the content is tailored to their interests. Posts should also be optimised to maximise their engagement potential (i.e. with regular use of GIFs, videos and links, which are unique and eye-catching).

“Do not ignore your audience and what excites them!”

PATRICIA ALVES, SOCIAL MEDIA MANAGER,
BOEHRINGER INGELHEIM

| CONTENT THEME | % OF POSTS | AVERAGE ER [%] |
|--|------------|----------------|
| ● <i>Corporate (company) news</i> | 25% | 1.93 |
| ● <i>Corporate social responsibility (CSR)</i> | 13% | 1.49 |
| ● <i>Product and research updates</i> | 8% | 1.12 |
| ● <i>Congress</i> | 19% | 1.04 |
| ● <i>Disease awareness</i> | 29% | 0.71 |
| ● <i>Other</i> | 3% | 0.62 |
| ● <i>Pharma industry news</i> | 2% | 0.19 |

Content themes vs. engagement rate⁶

But are pharma companies attracting the types of followers they desire? The fairly low engagement rate for disease awareness content suggests that, perhaps the pharma companies do not have as high a following in the healthcare community as they would wish for. With this in mind, whilst pharma social teams should optimise content to meet the needs of their current audiences, they should also consider ways to attract new audiences, in line with their preferred audience profiles (such as HCPs).

6. Based on manual coding from data collected on Pulsar CORE, a representative sample of posts from the Facebook, Twitter, Instagram and YouTube pages of the top 20 pharma companies

BUT WHAT USE IS CONTENT WITHOUT ENGAGEMENT?

As well as paid social strategies that can be used to target specific user groups, pharma companies should consider identifying and working with online influencers. Influencers are experienced social stalwarts who possess greater than average potential to influence others, due to attributes such as frequency of communication, personal persuasiveness or size of and centrality to a social network. These individuals can aid in the co-creation of content, including using the preferred language and subject matter. They can also share content within their own extensive networks, thereby raising the profile of their pharma partner.

This is a good example of a corporate post from a pharma company because it provides real-life advice from a J&J employee.

Novo Nordisk has used Twitter effectively to promote their annual report by including an engaging visual that links to the full report.

*“All social posts should meet the following criteria:
1. Offer customer value
2. Drive a business objective”*

ALISON WOO, DIGITAL & SOCIAL MEDIA
STRATEGY LEAD, BRISTOL-MYERS SQUIBB

CONCLUSION

WHAT NOW FOR PHARMA AND SOCIAL?

There has been a significant change in the way social media is being used, and an evolution in how audiences consume content.

Evidence shows there has been a shift from pharma companies 'pushing out' content, to a more dynamic 'push-pull' relationship. Whilst pharma companies are beginning to understand the importance of getting to know their social media audiences, the *Social Check-up* suggests there is a difference between the types of content pharma companies are putting out, compared to that which is receiving the greatest engagement.

So what's the next phase of social for pharma?

Companies need to keep on top of the changing environment and move from being marketers to publishers. In this way, they can transform superficial content into great stories and experiences; shifting from aimless connections to meaningful conversations. At Ogilvy we call this phase 'Deep Social', a strategy pharma companies can employ to drive better engagement for their social media activities.

This *Social Check-up* shows pharma companies need to work on:

- Developing strategic approaches that **encourage a two-way conversation, engaging and inspiring** audiences to retweet, share and comment
- Developing a greater understanding of their social audiences, so they know how to **maintain engagement** whilst simultaneously **attracting new followers**
- Putting **engagement at the heart of their communications** strategies, using tactics such as paid social to target and reach relevant audiences
- Considering a **healthy balance of created, curated and co-created content**, developed with their audiences in mind
- Understanding what interests audiences, and how different content types can drive different types of engagement

METHODOLOGY

WHAT DID WE TRACK?

Abbvie, Allergan, Amgen, Astellas, AstraZeneca, Bayer, Boehringer Ingelheim, Bristol-Myers Squibb, Gilead Sciences, GlaxoSmithKline, Johnson & Johnson, Lilly, Merck, Novartis, Novo Nordisk, Pfizer, Roche, Sanofi, Takeda and Teva.

For the above 20 companies, we tracked the activity of their corporate global social media pages using Pulsar CORE on Twitter, Instagram, Facebook and YouTube, from January 19th to June 19th 2016.

The companies were taken from PM Live's Top Pharma Companies by global revenue (<http://www.pmlive.com/top-pharma-list/global-revenues>). We are aware that there have been several mergers and acquisitions, and indeed new channels launched since this list was formed and that this may have affected the social output from some of the companies listed.

GLOSSARY

Engagement score – a weighted score of likes x1 + comments x 2 + shares and retweets x5

ER – Engagement rate, likes + comments + shares and retweets x 100 divided by impressions per post

MEET THE TEAM

OGILVY HEALTHWORLD



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CANVIN**
*Social
Director*



**RICK
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**CHELSEY
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*Account
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**PHILIPPA
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*Senior Account
Manager*



PULSAR



**GIUSEPPE
POLIMENO**
*Head of Digital
Research*



**SAMEER
SHAH**
*Research
Manager*



The ***Social Check-up*** is a thought-leadership series, brought to you by Ogilvy Healthworld in partnership with Pulsar. Combining Ogilvy's strategic expertise with Pulsar's cutting-edge data platform, The ***Social Check-up*** explores the latest trends in healthcare and pharmaceutical social media.

Ogilvy Healthworld is an expert health communications community (part of Ogilvy CommonHealth Worldwide, the largest global health marketing network). We build social strategies and programmes to change health behaviours; ultimately inspiring better health outcomes based on our strong scientific, social media and healthcare expertise.

Pulsar's software platform allows you to understand any audience, market, trend or conversation in great detail. An incredibly powerful tool that helps you solve a wide range of marketing challenges. Pulsar is available as a subscription to set up your own searches, or through our experienced team of researchers who can deliver the insights for you.

*For a chat about how to improve your
social media presence please contact
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*Curious to hear how you can benefit from data
driven insights using Pulsar? Please contact
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