
EU doctor attitudes & Medical Devices:

a compilation of the many **surgeon and doctor opinion & behaviour surveys** executed across EU interpreted for Med Dev

CONSULTANCY RESEARCH: CONTENTS & ORDER FORM

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"I was sick and you looked after me." Matthew 25:36

J'étais malade, et vous m'avez soigné. Matthieu 25:36

ich war krank, und ihr besuchtet mich. Matthaues 25:36

estuve enfermo, y me atendieron. Mateo 25:36

1. Market communication with doctors

Medical Device executives continue to be short on time: a wide portfolio of products, economic pressures on the business and constant competition. To make marketing decisions without full awareness of the customer attitudes and behaviour is foolishness. Commissioning primary market research is expensive. To ask questions which have already been asked and are already available in the public domain is clearly a waste of money. This project draws together, in a cohesive and logical framework, opinions, behavioural studies and attitude surveys from across Europe which are already available. Not just as a reference tool, but over 150 articles interpreted into incisive business strategies.

The economic squeeze on healthcare provision, the greater involvement of administrators and increased awareness and knowledge of patients is changing attitudes of doctors and surgeons to the Medical Device industry in Europe.

- **Emergence of the 21st century surgeon** – Graduating in the last decade, younger health professionals have not known a business life without ready access to the plethora of information on the internet. The advent of smart phones and social networks are changing their communication connections. Peer recognition and personal relationships remain vital but it is the way that they are being engaged that is different.
- **Challenge of technology revolution** – The Medical Device industry is moving at a faster pace. Not only innovation but the blurring of boundaries between pharmaceutical solutions, medical device and IT. Surgeons and doctors are ever more challenged to keep themselves up to date and abreast of the latest options and yet are often frustrated by the economic constraints and greater focus on cost-benefit arguments by hospital administrators. In its communication the Device industry has to be alert to these pressures.
- **Changing patient attitudes** – The general public are increasingly knowledgeable about the medical options open to them. The advent of the widely available (broadband) internet, the explosion of health care portals and sites, the seemingly unsatisfied health interest across print, TV and radio are fuelling a knowledge transfer at unprecedented levels. Inevitably patient attitudes are changing. The issue of access and the politically charged, even ‘taboo’ subject of healthcare rationing are more openly in debate. The formally sacrosanct “doctor knows best” perception is fast

being undermined. Patients have greater expectations for outcomes, want to be able to exercise choice and seek a 'suable' culprit if things go wrong.

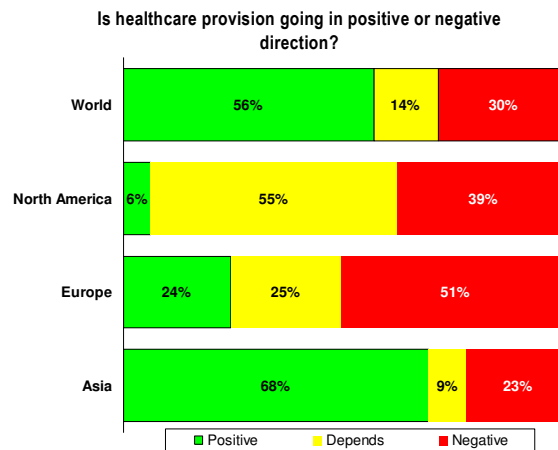
Standing still is not an option. This research project reviews the plethora of publicly available surveys of patient behaviour, attitudes and perceptions.

2. Examples of survey information available

Intelligent interpretation needed

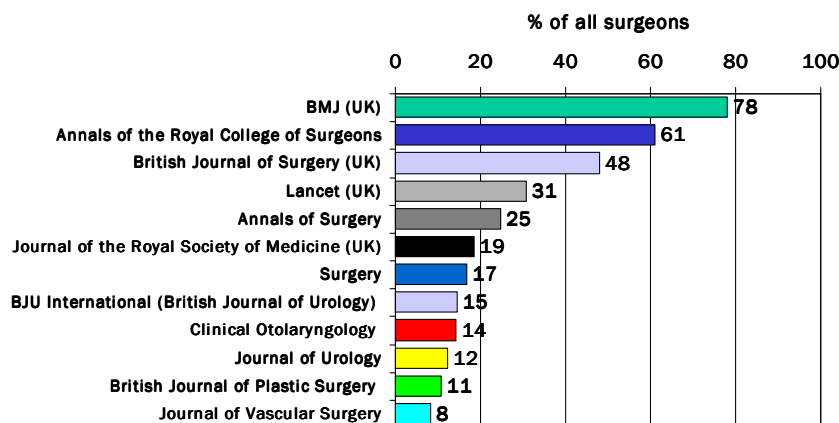
There is so much survey information available which would be very valuable if it was interpreted into a marketing framework for Medical Device companies. Here are just three used in the report:

Figure 1 Perception of doctors towards trends in healthcare provision



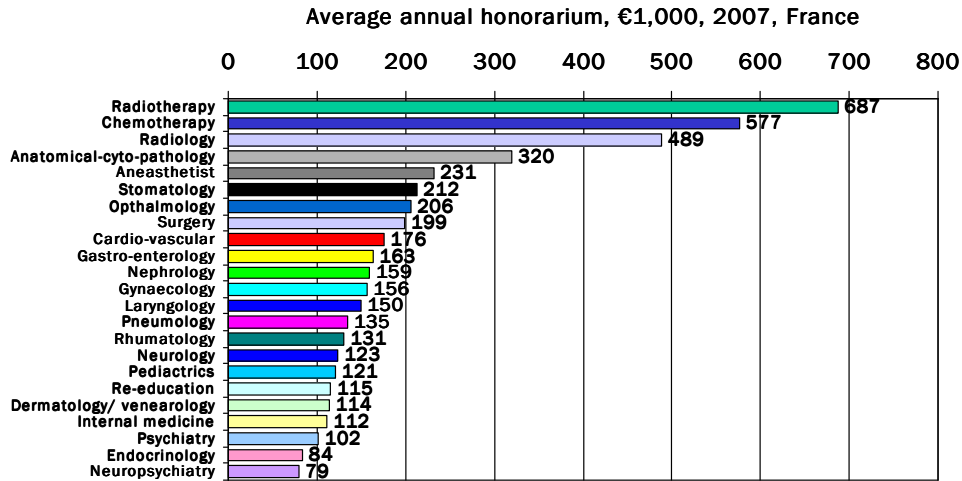
Source: Pfizer, annual survey, 2008

Figure 2 Journals read by surgeons



Source: BMC Med Inform, 2006, UK

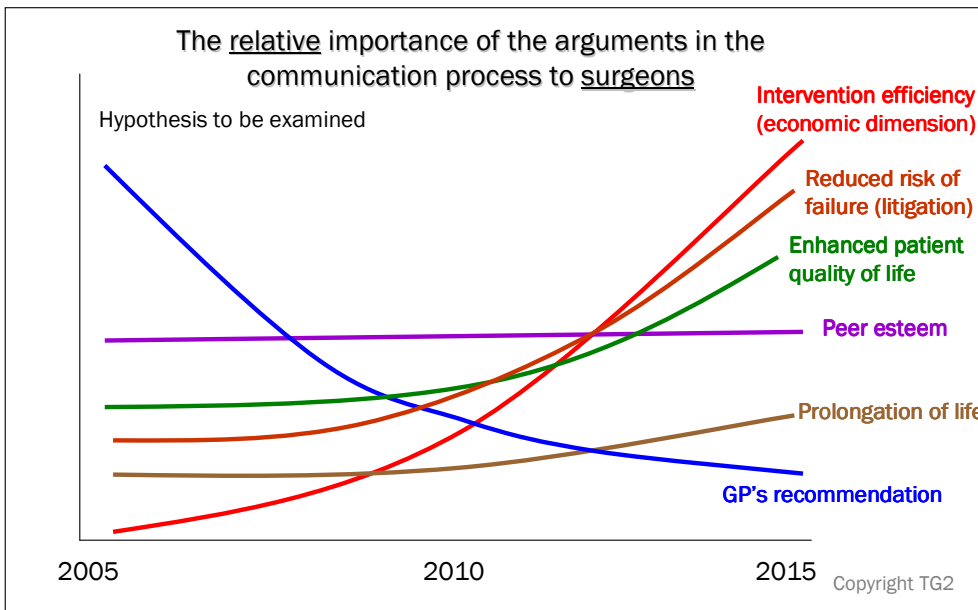
Figure 3 Surgeon remuneration, 2007 by specialisation



Source: IGAS, published 2009, Survey of surgeon and doctor remuneration in hospitals, France

However, providing information that is logically assembled and interesting is not enough: it needs to be interpreted into a strategic framework. This is where TG2's specialisation in market communication in the Medical Device sector across Europe comes to the fore. For example, how might attitude maps change arguments in the communication process (hypothesis subsequently reworked by the research):

Figure 4 Change in arguments for Medical Device communication



3. Objectives of the project

- a) To equip Medical Device marketeers with knowledge of changing doctor and surgeon attitudes, perceptions and behaviour;
- b) To map the perceptions of doctors and surgeons in order to expand and render more effective Medical Device company consumer market communication in Europe;
- c) To identify the strategic implications for Medical Device companies of the evolving nature of the doctor-patient and doctor-administrator relationship and its impact on surgeon support programmes, product choice and care pathways;

And ultimately...

- d) To increase the value of Medical Device sales of each subscriber to the project report.

4. Who the project report is for

JOB RESPONSIBILITY	CEOs, VPs, Principals Marketing & Brand managers Investor & Media relations	Corporate communication Medical Education Government & Public Affairs
CUSTOMER MARKETING EXPERIENCE	Those companies who have one or more individuals specifically assigned to integrated surgeon-doctor-patient-hospital marketing in Europe. The project will help you carry the internal political argument for improved resources	Those that leave integrated surgeon-doctor-patient-hospital communication to national marketing teams. The project will serve as a valuable centralised resource
LOCATION	EU-based US global companies Japanese global companies	Exporters into EU from – USA Far East Australasia
BUSINESS TYPE	Active implantable devices Non-active implantable devices Biotechnological products Dental Ophthalmic	Anaesthetic/respiratory equipment Electromedical equipment Diagnostics Surgical instruments Medical disposables

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