
EU patient attitudes & Medical Devices:

an interpreted compilation of the many **patient opinion** &
behaviour surveys executed across Europe

**CONSULTANCY RESEARCH PROJECT:
REPORT 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. Consumer marketing focus

Why this research project?

Medical Device executives are so short of time. Yet to make marketing decisions without full awareness of the ultimate consumer 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 interpreted into incisive business strategies.

The economic squeeze on healthcare provision and the greater awareness and knowledge of patients and their changing attitudes are offering new and exciting, direct-to-consumer marketing opportunities for the Medical Device industry in Europe.

- **Increasing patient knowledge** – 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. Patients are demanding greater choice from the multitude of medical options and choice as to where they might receive treatment. Governments are being forced to respond, often in ways that make economic assessments of alternatives more transparent.
- **Changing patient attitudes** – Inevitably patient attitudes are changing, even before the above mentioned theme of rationing has shown its impact. 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.
- **New consumer marketing** – The Medical Device industry is at a ‘communication cross-roads’. Every indicator that one looks at ‘screams out’ that creating patient pull for specific brands and medical systems is quickly becoming the new marketing battlefield. In Europe there are particular cultural and ethical constraints, but a rich diversity of opportunity.

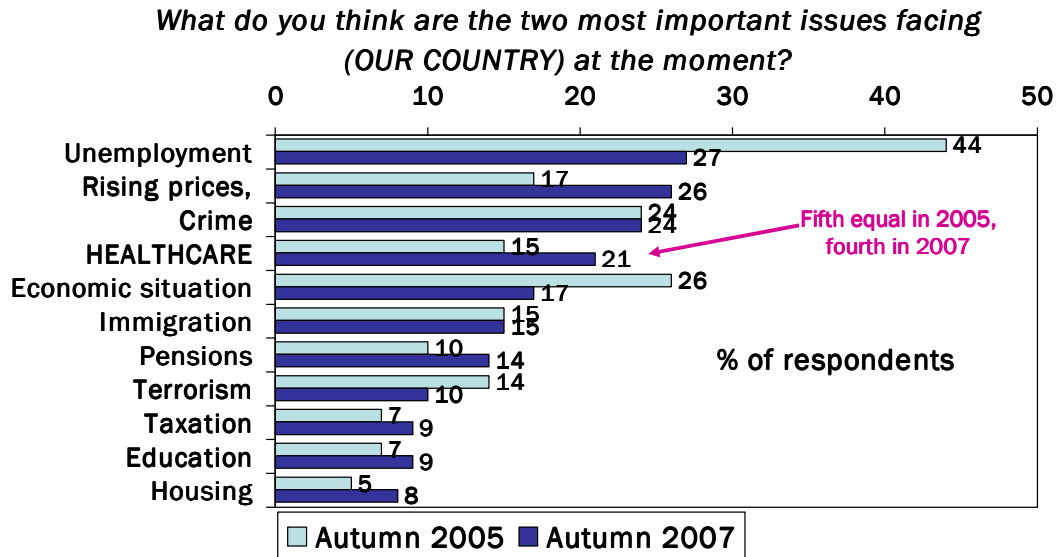
Standing still is not an option. This research project reviews the plethora of publicly available surveys of patient behaviour, attitudes and perceptions.

2. Examples of survey information available

Intelligent interpretation needed

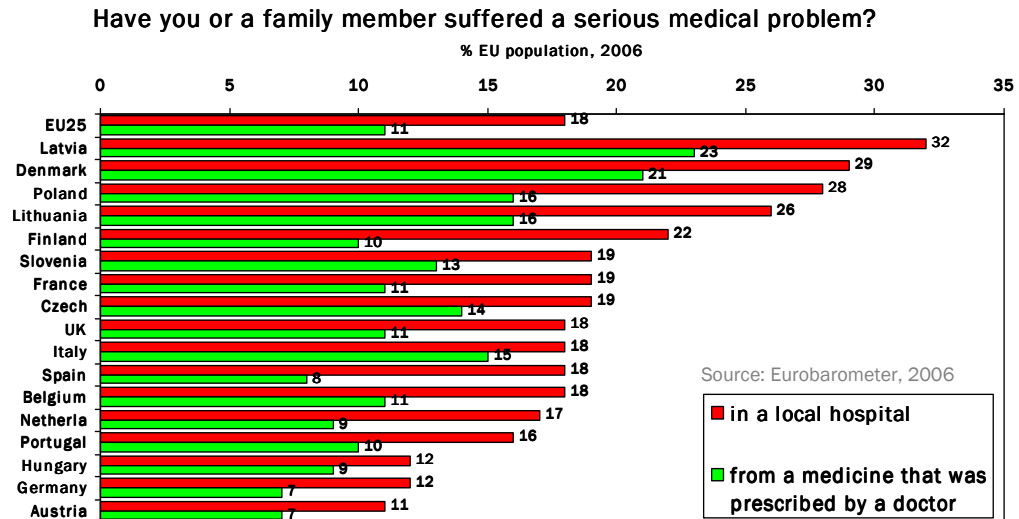
There is so much survey information available which is very valuable as it is interpreted into a marketing framework for Medical Device companies. Here are just three:

Figure 1 Relative importance of health as an issue



Source: Eurobarometer, Public Opinion in the EU, autumn 2005 & 2007, published Dec

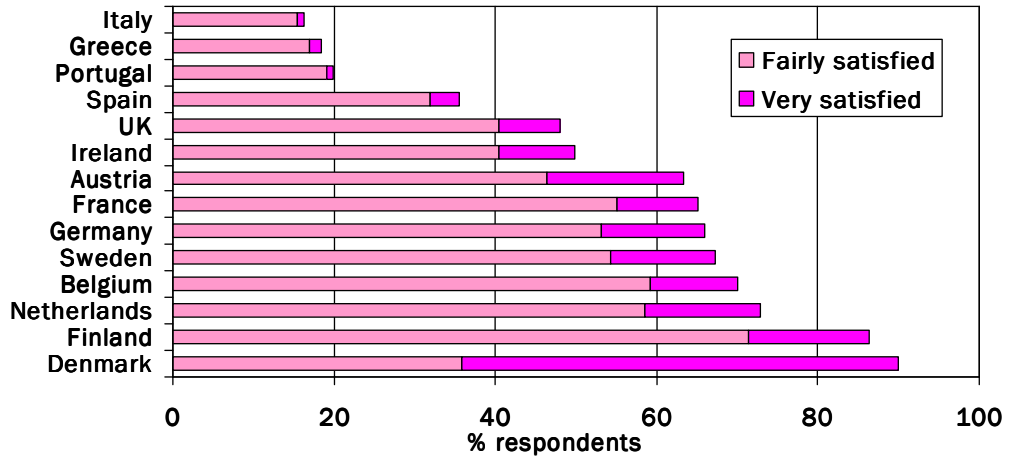
Figure 2 Personal experience of medical errors



Source: Eurobarometer, 2006

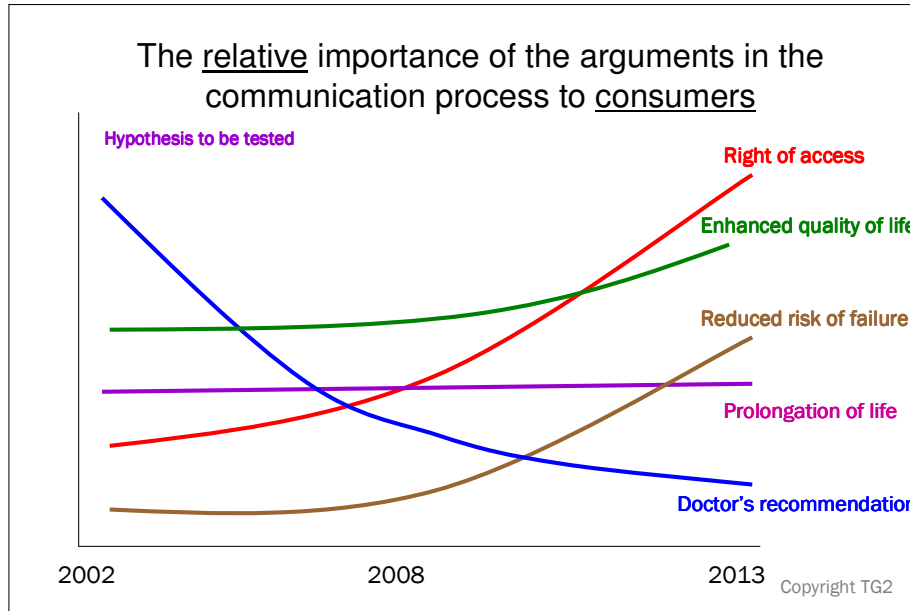
Figure 3 Satisfaction with health care provision by country

In general, would you say were very satisfied, fairly satisfied,...with the way health care runs in your country?



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 patient communication process:

Figure 4 Change in arguments for Medical Device communication



3. Objectives of the project

- a) To equip Medical Device marketeers with knowledge of changing patient attitudes, perceptions and behaviour;
- b) To map the perceptions of patients 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 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
DIRECT TO CONSUMER MARKETING EXPERIENCE	Those companies who have one or more individuals specifically assigned to direct-to-consumer marketing in Europe. The project will help you carry the internal political argument for improved resources	Those that leave patient 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

5. Scope of the report

- Geographical coverage - EU
 - The six big EU markets: Germany, France, Poland, Italy, Spain and UK
 - Other markets where differences which affect principles are especially noteworthy
- Healthcare sector
 - focus on secondary care
- Products to which the recommendations are applicable
 - Non-active implants
 - Active implants
 - Non-implant equipment
 - Diagnostics
 - Biologicals
- Report outcomes
 - Implications for industry direct to consumer marketing
 - Implications for company specific strategy and actions
- Time horizon:
 - 2008 to 2013

6. How will you use the report?

- To appraise the company individuals with market communication responsibilities on how the **patient-surgeon paradigm** is changing and what the anxiety 'hooks' will be in the future to which market strategies can be attuned.
- To provoke an internal review of **patient information evidence** in order to stimulate more appropriate data collection (trials and surveys), in tune with the future patient-surgeon dialogue context.
- To provide a secure patient healthcare perception and behavioural map from which **product and market gaps** may be flagged up to the research and product development department.

- To provide a basis for reviewing overall company **-resource allocation** leading to changes in the way in which the Medical Device direct-to-consumer communication is planned and delivered.
- To establish a **communication strategy** that takes full cognisance of the personal motivators and country specificities, differentiating patient audiences from more traditional healthcare professional targets.
- To engage in an effective **patient communication plan** that uses all the marketing communication skills – to grab attention, raise interest, secure conviction and overcome obstacles.
- To identify the needs for **training** to deliver direct-to-consumer arguments in support of Medical Device products offered in a market in which patient choice and empowerment become ever more prevalent.

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