Who are the pharma social media butterflies?

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Ogilvy Healthworld

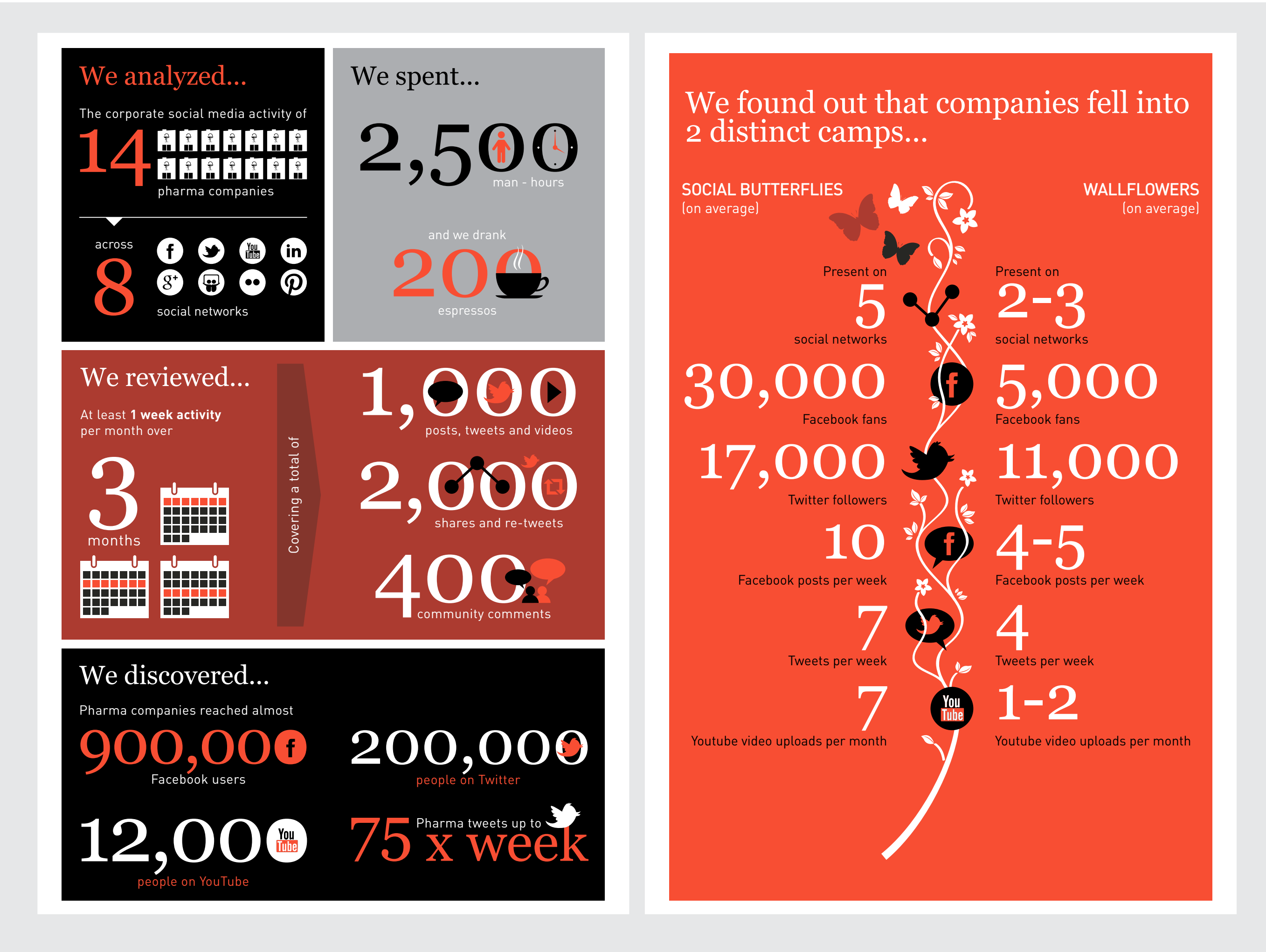
EXECUTIVE SUMMARY

Who is doing the most proactive social media engagement within the pharmaceutical industry? Should pharma really compare itself to other sectors when it comes to social media? Is pharma's use of social media evolving in the right direction? What are the defining characteristics of those pharma companies who are engaging more?

These are just some of the questions we keep hearing when it comes to pharma and social media. So we thought a bit of analysis of the industry would be interesting to see who was driving the party and who was standing back to watch and learn – the social butterflies and wallflowers.

This is not about black and white metrics rating activities as good or bad, or who has the most followers, but simply assessing who is engaging more, what could be underpinning this and how the pharma industry as a whole is evolving in this space. We think everyone is learning, just at different rates, and no single pharma company has the magic formula just yet.

See what we uncovered… and then share with us what you think @OgilvyHWUK!



Looking within pharma for social media inspiration

If you look behind the constant noise around the pharmaceutical industry and social media, the real debate has moved on from "can pharma use social media?" to "how should pharma best be using social media?" Even the most conservative of pharma companies are aware of the potential online engagement now offers for better understanding disease areas, corporate reputation and how medicines are being used in the real world. One recent survey showed that almost half (43%) of US pharmaceutical and biotechnology companies planned to increase their social media spend with patient-focussed initiatives, albeit the increase was from a low baseline[1].

But despite this progression, pharma still lags behind many other industries when it comes to social media use, feeling shackled by a dual combination of compliance concerns from working within a heavily regulated environment (which have probably not been helped greatly by the recent FDA guidance[2]) and doubts about how to measure the return-on-investment (ROI) for such initiatives. As a result, only 7% of senior pharma executives felt their company was advanced in approaches to digital, mobile and social media, compared to 33% in the insurance industry[1].

While there is undoubtedly inspiration that can be drawn from other sectors, such comparisons are therefore always going to paint a slightly pessimistic picture, which is not a fair reflection of some of the innovative engagement that we see taking place within pharma. Instead, we wanted to find out who was driving such social media innovation from within the industry – who are the butterflies spreading their wings and leading the way, and who are the wallflowers, simply listening and waiting to see how others fare before getting involved.

To do so, we looked at corporate activity (brand or disease area campaigns were not considered to allow for a fair comparison) around social media for 14 leading companies, based on a number of metrics designed to measure real engagement rather than just amount of activity – quality as well as quantity. Two time points were used for evaluation, late 2012 and late 2013, so that the trends over the year could also be observed.

The aim is not to be judgemental and there are no simple 'good' or 'bad' terms to be applied to high or low scores. Instead, it is the relative positions of the companies, their evolution over time and the factors underlying some of the key changes that we were interested in. Even within a year there have been some big changes and the wallflowers of today could be the butterflies of tomorrow.

In the spirit of social media, we hope it triggers some interesting thoughts and debate!

1. Myer R. Social media and healthcare: challenges for pharmaceutical marketers. April 2013, EMarketer Inc.
2. January 2014 DRAFT GUIDANCE FOR INDUSTRY, FDA

Welcome to the pharma social media party: butterflies and wallflowers

Social media has been likened to a continuous party taking place online, all day and all night, so it seemed appropriate to use the results of our findings to compare pharma companies to the different types of people you would find at a real party. Of course, if we took the analogy too far we could end up with all kinds of complex personality labels, so we thought it was much simpler to just divide these 14 companies into two groups – the social butterflies and the wallflowers.

Social butterflies

These companies are consummate socialisers – the life and soul of the party. They are active in a variety of platforms, and are consistently and regularly broadcasting, sharing content and engaging in dialogue with their community. Each butterfly has specific "party tricks" – activities or platforms where they particularly excel. In general, the larger pharma companies are in this group, but there are a couple of smaller companies punching above their weight! We are not generalising about whether the activities of social butterflies are productive or right / wrong, simply that they are pushing ahead and driving the conversation.

Wallflowers

These companies seem keen to be involved but may have only more recently arrived at the party. In line with this, they are currently standing back a bit, perhaps working out the social dynamics before diving into conversation. This is not to say they are not active, but are more likely to be focussed on just one platform (or internal social media), building their experience and confidence to eventually join the butterflies. In general, they are all at a broadly similar level in terms of activity and engagement – growing their expertise along the way.

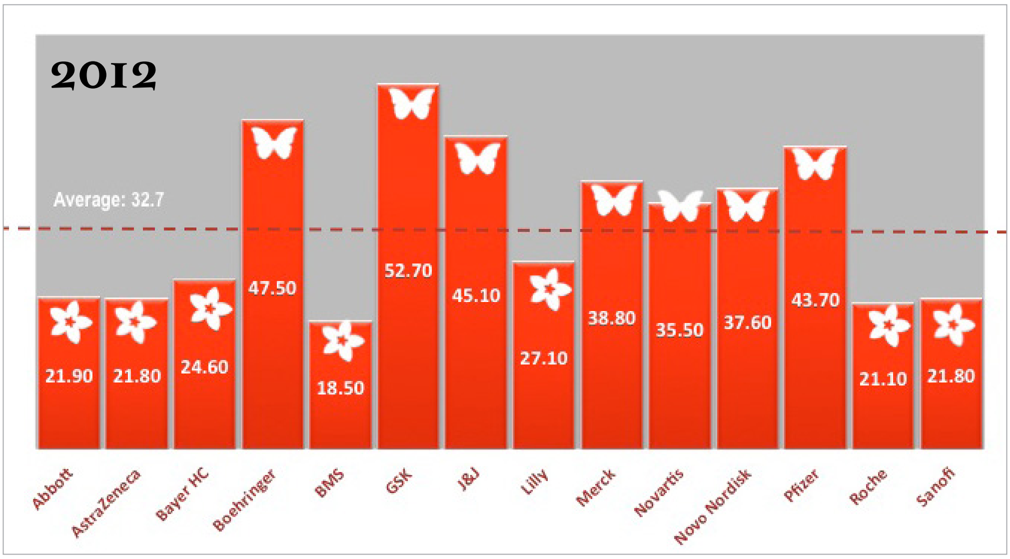
Remember – it's all relative, with an arbitrary dividing line based on average scores, and can change very quickly over time!

PHARMA IS BECOMING MORE SOCIAL

For those with a technical mind, the full scoring methodology and metrics used are explained at the end, but six specific metrics underpin the analysis presented here. Overall scores take account of six different sub-metrics combined – social presence, social network, community size, activity, engagement and virality. In particular:

- **Community size** uses Facebook likes, Twitter followers and YouTube subscribers as a marker for breadth of social reach.
- **Engagement score** counts volume of interactive posts on their social channels (comments and likes).
- **Activity** looks at how regularly the social media channels are updated / how frequently posts are made.

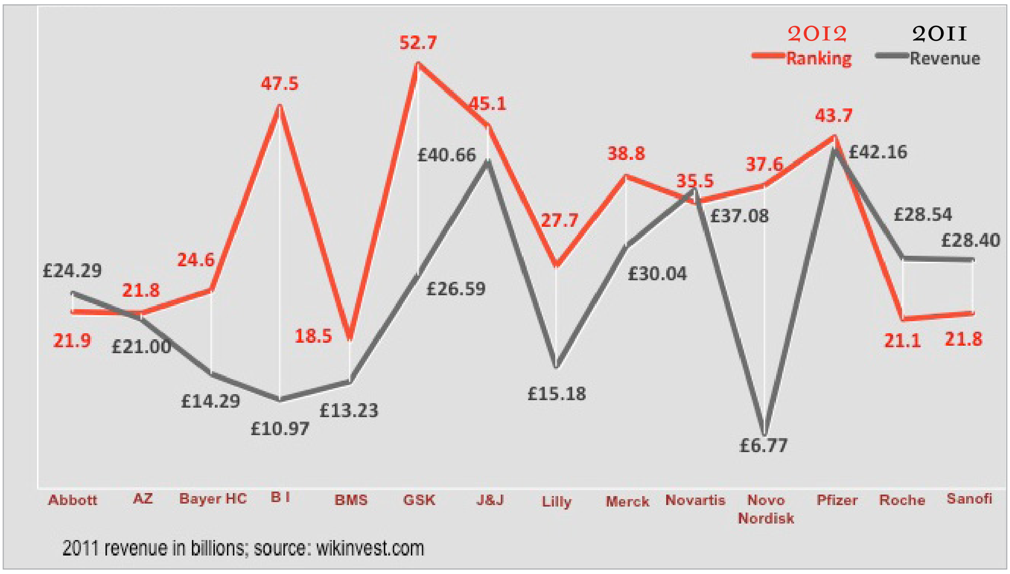
FIG 1: How the companies compared across 6 social parameters (overall scores)



Overall, a small but positive change in the average total score can be seen for the 14 companies surveyed, which suggests that pharma is getting more social (figure 1). Within this, several companies show more significant advancement, namely Boehringer Ingelheim, Novartis and Eli Lilly, the latter being the only company to move from 'wallflower' to 'social butterfly' status over this period. Eli Lilly has focussed significant effort recently on its LillyPad social media platforms for corporate life, social responsibility and public policy discussion, with the launch of the European version, LillyPad EU, at the start of 2013 no doubt underpinning this dramatic shift.

FIG 2: Alignment of social score with revenue

In most cases social score aligned with company revenue



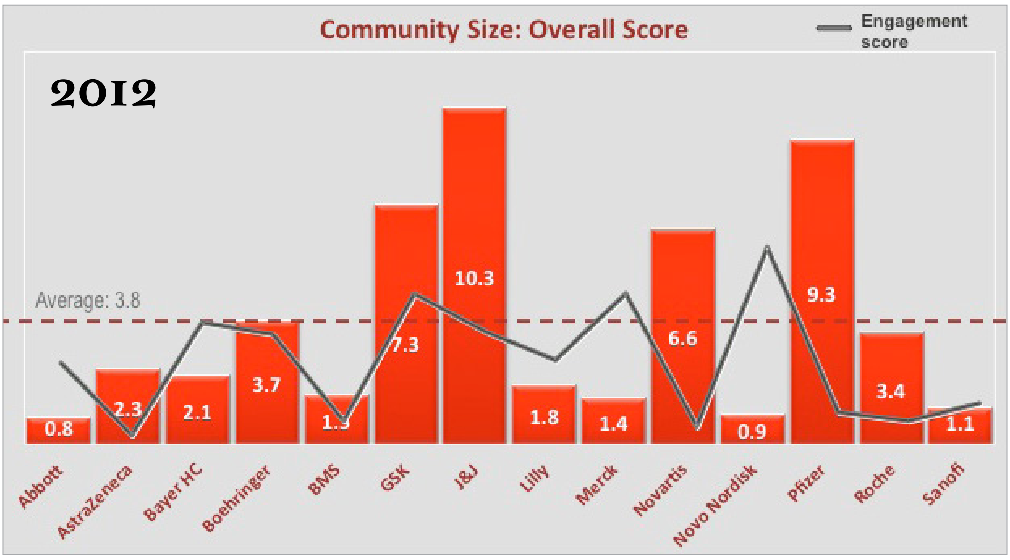
It might be expected that the larger companies would allocate more resource to social media activities and therefore come out with higher overall scores. Figure 2, which overlays 2011 revenues, shows that this is generally correct, but does highlight some outliers. On this comparison, both Boehringer Ingelheim and Novo Nordisk are 'punching above their weight', with scores that are disproportionately high compared to their revenues.

For Boehringer Ingelheim, this reflects the view from a number of external observers that it has created a culture of positive experimentation with social media, backed by a willingness to invest 'ahead of the curve' in using these channels for engagement. In the case of Novo Nordisk, it has such a strong presence in diabetes that the lines between corporate and disease area / product social media activity are less defined, which may contribute to its outlier status.

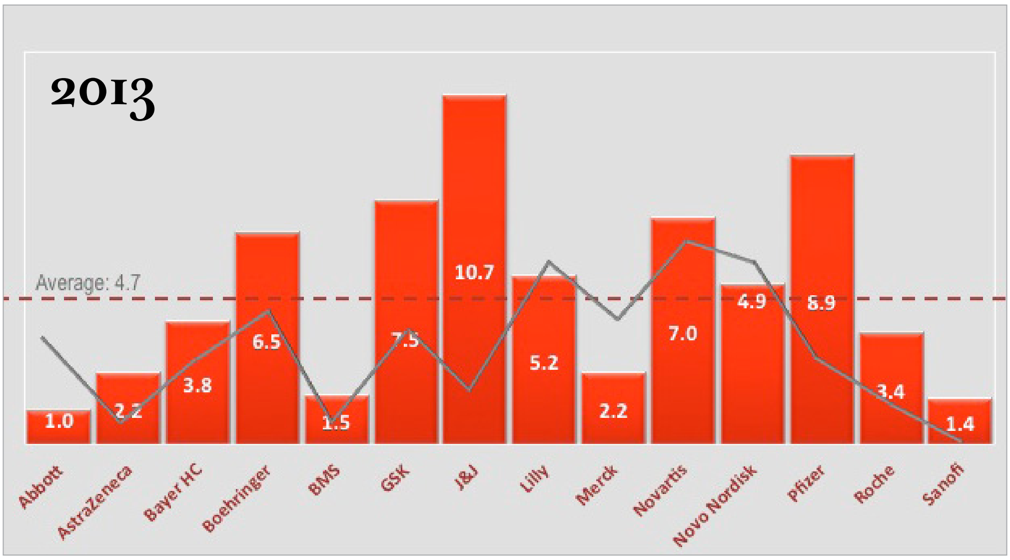
GlaxoSmithKline also comes out with a relatively high engagement score versus revenue, although the other big pharma with a major consumer side, J&J, follows the more general trend, so this is not just down to consumer-focussed activities.

FIG 3: Community size vs engagement

Community size is not always an indication of sociability



Larger communities, but similar engagement

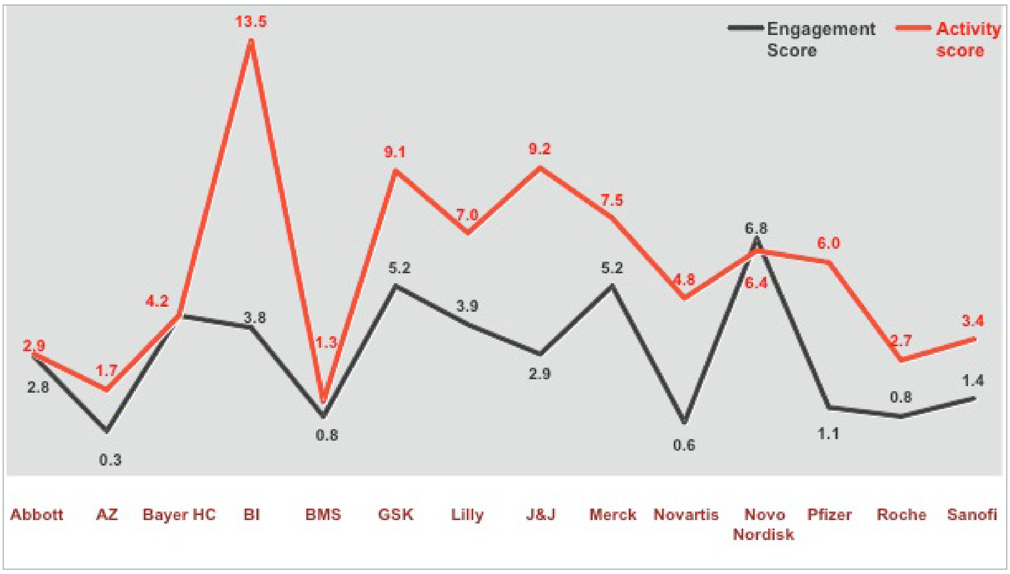


Many analyses of social media engagement and influence fall into the trap of being too focussed on quantitative metrics around number of followers, fans and subscribers, rather than actually how engaged pharma companies are. When assessing big corporates with employee counts in the tens of thousands this can be particularly problematic, as you might expect most workers to follow their own company! We wanted to avoid this skew, hence the six different sub-metrics, with figure 3 showing the general lack of alignment between the community size and engagement sub-metrics, to reinforce the point.

Here, Boehringer Ingelheim, Eli Lilly and Novo Nordisk show the greatest growth in community size between 2012 and 2013, with Eli Lilly and Novartis showing the most growth in engagement score. Again, for Eli Lilly, the launch of LillyPad EU in January 2013 will have driven this, but both Boehringer Ingelheim and Novo Nordisk have shown a willingness to develop presences across multiple social media channels and even several different 'faces' within the same channel. Novo, for example, has different Twitter accounts for its US operations, live congress tweets, corporate sustainability, 'Team Novo Nordisk', graduate recruitment and government affairs / public policy, in addition to its central account.

FIG 4: Engagement vs activity

More broadcasting than conversing?



The other factor that often skews this type of analysis is letting volume of activity have too great an influence on overall score. Just because a company is sending 100 tweets a day does not mean that anyone is actually listening! Figure 4 shows that, while there is a general (and healthy) alignment between the activity and engagement sub-metrics, Boehringer Ingelheim comes out as the most active of the 14 companies surveyed (well ahead of its relative engagement score position) and Novo Nordisk is the only company to show a higher overall engagement than activity score.

Lessons from the pharma butterflies

It is impossible to cover every aspect of the survey in this brief analysis, so think of this as just a taster, but overall we think pharma is getting more social and expect to see more butterflies emerging over the next year. Since making the first tentative steps into social media in 2006 many pharma companies have been trying new platforms and approaches, with some mis-steps but overall great success – despite the lack of clear guidance from the FDA or ABPI.

So how do the wallflowers properly join the party? We have observed a few general characteristics of the social butterflies, which may help them get more involved:

1. **A clearly articulated vision and purpose for social media engagement, usually published on their corporate website**
2. **Having identifiable community or social media managers that provide a warm (and often witty) human voice to content posted in social channels**
3. **Creating and sharing interesting, informative and entertaining content relevant to their community**
4. **Offering a quick and helpful response to comments and questions whenever possible.**

The social media landscape is rapidly evolving (Vine was launched and gained almost 40 million followers while we were busy collating and analysing this data!) so it is great to see pharma companies evolving with it. In the next audit we look forward to seeing how the wallflowers have grown!

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Ogilvy Healthworld

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Methodology

	Social Presence	Social Network	Community Size	Activity	Engagement	Virality
Overview (what we looked at and why)	How many social networks is the company on?	How simple and intuitive is the connection between the social networks?	How big is the community?	Is the content kept fresh with regular updates?	Are the companies engaging their users and generating interest?	Is the content spread around the social-sphere?
Analysis (what we analysed and what tools we used)	Quantitative: Individual count for every company	Qualitative: Analysis of corporate websites and social networks to evaluate the link-building strategies	Quantitative: Individual count of: Facebook likes; Twitter followers; YouTube subscribers	Quantitative: Individual count of updates on Facebook, Twitter and YouTube	Quantitative: Individual count of comments and likes left on Facebook and interactions and comments on Twitter	Quantitative: Individual count of re-tweets and Facebook shares
Score type and range	Absolute score: 1–8 as 8 networks were reviewed. Figure multiplied by 1.75 to generate a score of 1–14 (14 is highest)	Absolute score: 1–10 (5 points for visibility on website and 5 points for interconnectivity between social networks). Figure multiplied by 1.4 to generate a score of 1–14	Relative score: 1–14 for Facebook, Twitter and YouTube. Final score is the average of the three scores 1–14 (14 is highest)	Relative score: 1–14 for number of Facebook posts, Tweets and YouTube uploads. Final score is the average of the three scores 1–14 (14 is highest)	Relative score: 1–14 for engagement on Facebook, Twitter and YouTube. Final score is the average of the three scores 1–14 (14 is highest)	Relative score: 1–14 for Facebook shares and re-tweets. Final score is the average of the two scores 1–14 (14 is highest)

(a): corporate site defined as global company presence unrelated to specific brands/advocacy platforms, communicating company news, disease awareness updates to the healthcare community and general public. Networks excluded include those focussed on HR/recruitment issues, aside from LinkedIn. (b): community size calculated the first week of October 2012 and in December 2013 (c): the weeks analysed for Facebook and Twitter were: May 21–27, July 23–29, September 24–30 2012 and December 2013. YouTube uploads were counted in August, September, October 2012 and December 2013. (d): the companies virality and engagement scores were weighted by the size of their communities to ensure the scores in these categories were relative and measured equally. The weighted scores were calculated by dividing the results (i.e. Number of interactions/comments/shares etc. by the community size each week. The community size for each week was calculated as follows:

For Facebook and Twitter: Data by Social Media Monitor by WildfireApp https://monitor.wildfireapp.com/

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