

Bryter.

DIGITAL MARKETING to Physicians





“Most rep visits are between
2 and 5 minutes.
If it’s longer then we don’t have
the time.”

HCP

What is happening to healthcare sales forces?

Historically sales representatives have dominated direct-to-physician marketing of pharmaceutical products. In the mid-1990s, having a strong pharma sales force was essential. They were the ones able to reach doctors, especially high prescribers. By detailing their products to physicians, they could increase prescription support whilst maintaining a direct link between pharmaceutical companies and HCPs. In Europe the numbers of sales reps grew by as much as 60% from 2000 to 2005.¹

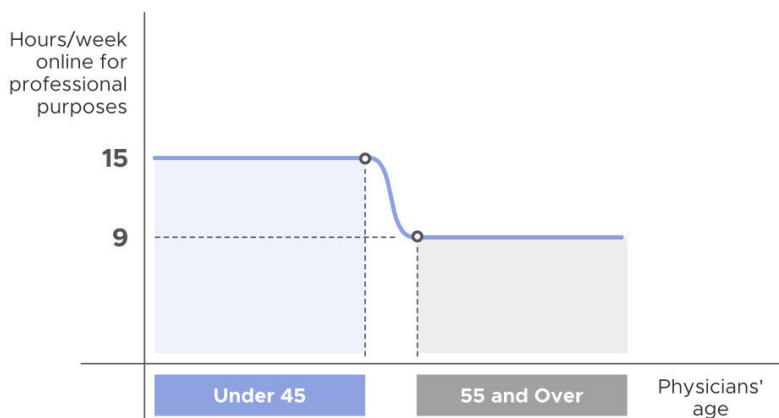
Since this period there has been a slow but distinct decline in the sales force. Various factors have influenced this, including primary care drugs reaching the end of their patent lives, and a move from primary to specialty care. Pharma reps in the UK decreased by a third from 2009 to 2011, and France, Germany, Italy, the UK and Spain saw a 7% decline in 2013.²

In combination with this, attitudes of doctors themselves are changing. Newer generations of HCPs are less receptive to reps, not only limiting visits more so than their predecessors, but also giving reps less of their time. As a result, rep access has become increasingly restricted; in 2008 nearly 80% of physicians were rep-accessible, compared to just 44% in 2016.⁸

Why are physicians and manufacturers turning to digital?

Rapid developments in technology and digital communication have transformed the way people access information; healthcare professionals too have integrated digital technology into their professional lives. Over 70% of doctors in Europe agree that they could not do their job without access to digital technology and information.⁴

This digital integration can be seen across many aspects of their profession. Physicians under the age of 45 spend 15 hours/week online for professional purposes, compared to nine hours for those aged 55 and over.



Doctors spend an average of **84 hours/year** reading digital marketing material.

In **2017**, digital marketing activity surpassed sales force activity for the first time in **8 years**.

When making decisions, physicians spend twice as much time searching for information online than in print materials, whether on laptops, smartphones or tablets. More than 70% of doctors in Denmark, the Netherlands and Sweden write prescriptions electronically. ⁴ 81% of HCPs use their smartphones for professional purposes ⁵, with two thirds checking them more than ten times a day ⁶. Online conferences and presentations are also growing due to the lack of time available to attend traditional seminars, with HCPs increasingly using mobile apps such as Lexicomp, UpToDate, and Halo.

In response to this changing landscape, the role of digital marketing to physicians is becoming increasingly important. With growing difficulty in securing face-to-face visits with HCPs, pharmaceutical companies are responding with increased use of digital platforms; including email, mobile alerts, and websites. Despite the use of digital communication and tools among HCPs worldwide, the uptake of digital marketing still lags in Europe; the volume share of digital promotional activity is just 11% compared to 21% and 47% in the US and Japan respectively. ⁹

Digital channels allow companies to extend their reach at a significantly lower cost than using sales-representatives. In fact, one in four sales interactions have been replaced by digital ⁷, with 53% of all marketing outreach to doctors happening without reps, primarily through digital communications. Doctors spend an average of 84 hours per year reading digital marketing material. ⁸ In 2017, digital marketing activity surpassed sales force activity for the first time in eight years. ⁸

Sales-reps vs. digital: Who wins in the eyes of the customer?

A better understanding of physician preferences can allow marketing efforts to be shaped according to their changing needs. In a survey of over 1500 physicians across Europe, Bryter asked them to rank the most important factors when communicating with pharmaceutical companies.

Most important factors when communicating with pharmaceutical companies

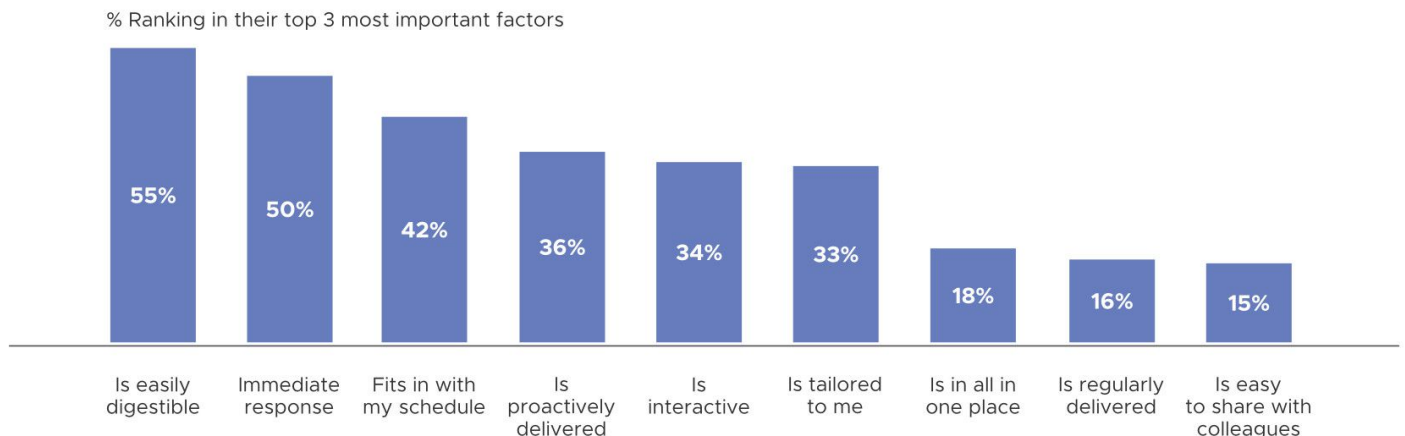


Figure 1. Q. Please select the THREE most important factors for you when communicating with a pharmaceutical company. Base: Total (1553)

Most valued was content that was easily digestible and receiving an immediate response to their questions, followed by communications that fit in with their schedule.

It is also essential that companies recognise the preferences of their individual customers. For example in Belgium only 20% express a desire for interactivity, but 45% want information that is tailored specifically to them. In Italy only 18% want interactive content, and a much greater need is placed on easily digestible content, preferred by 69%.

What is clear across all HCPs is that they want this process to be as effortless as possible, with information that is both easily accessible and easy to understand.

With current projections suggesting an increasingly digitalised landscape, optimising the use of digital engagement approaches requires an understanding of how digital media contrasts with physician's experiences of sales-representatives. To address this, Bryter also investigated how different formats compare head-to-head in the research.

A consistent theme that emerges across most factors is that the majority of doctors are neutral, feeling that both reps and digital are equally able to communicate these types of information. Despite growing integration and reliance on digital, HCPs remain convinced of the ability of digital channels not only to provide them with the same support that reps offer, but to enhance their interaction with pharmaceutical companies. This transition to digital channels appears to be more challenging in some markets compared to others; in France and the UK HCPs are generally more open to digital communications, whereas in Belgium there is a clearly a greater reliance on face-to-face meetings with reps.

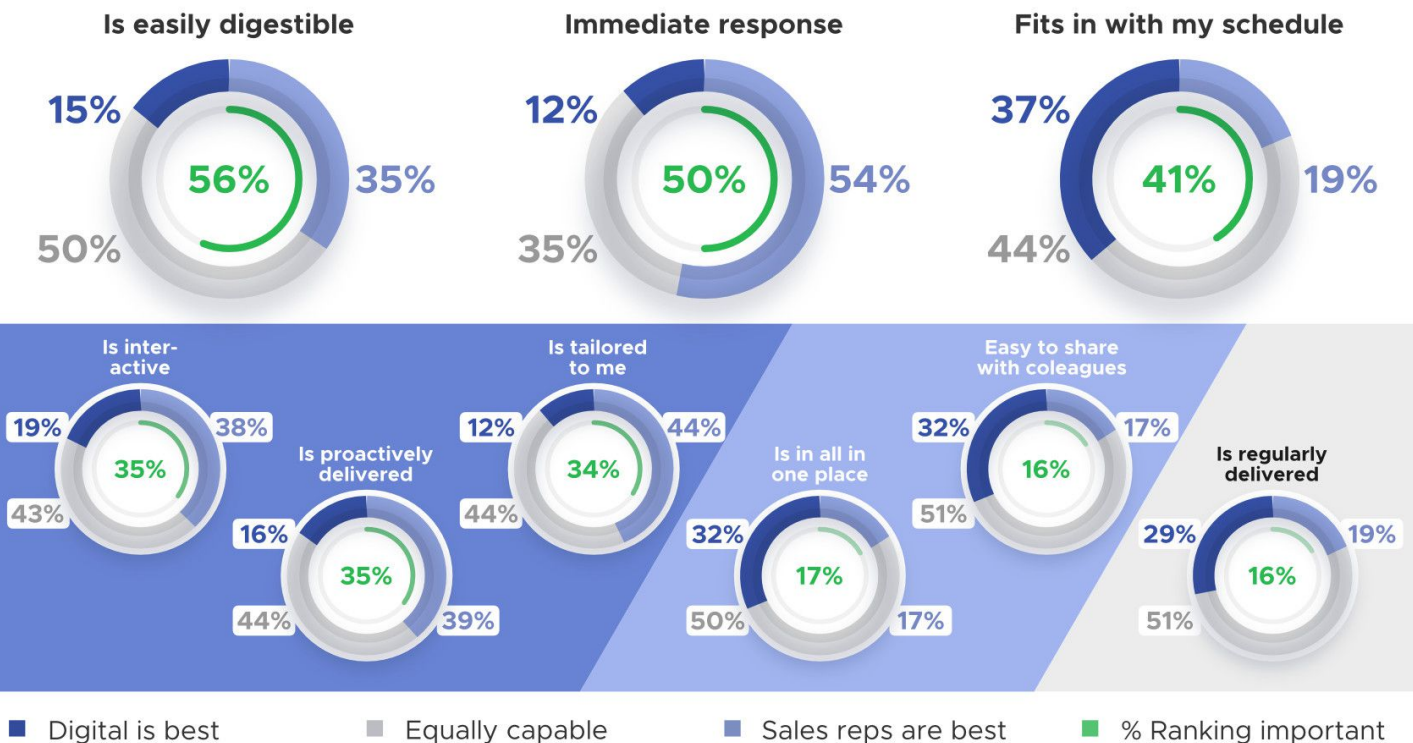


Figure 2. Q. Please select the THREE most important factors for you when communicating with a pharmaceutical company. Q3. In your experience, how well are sales representatives able to provide information in the following ways, in comparison to online / digital media? Base: Total (1553)

Doctors value pharmaceutical companies providing information that is easily digestible. Only 15% believe digital can do this best while over one third believe reps are better, although half express no strong belief either way. Looking at individual markets reveals a persistent pattern: with France followed by the UK, showing the most optimism about the performance of digital. Switzerland and Belgium have either no preference or favour the ability of reps.

Format best at providing information that is easily digestible

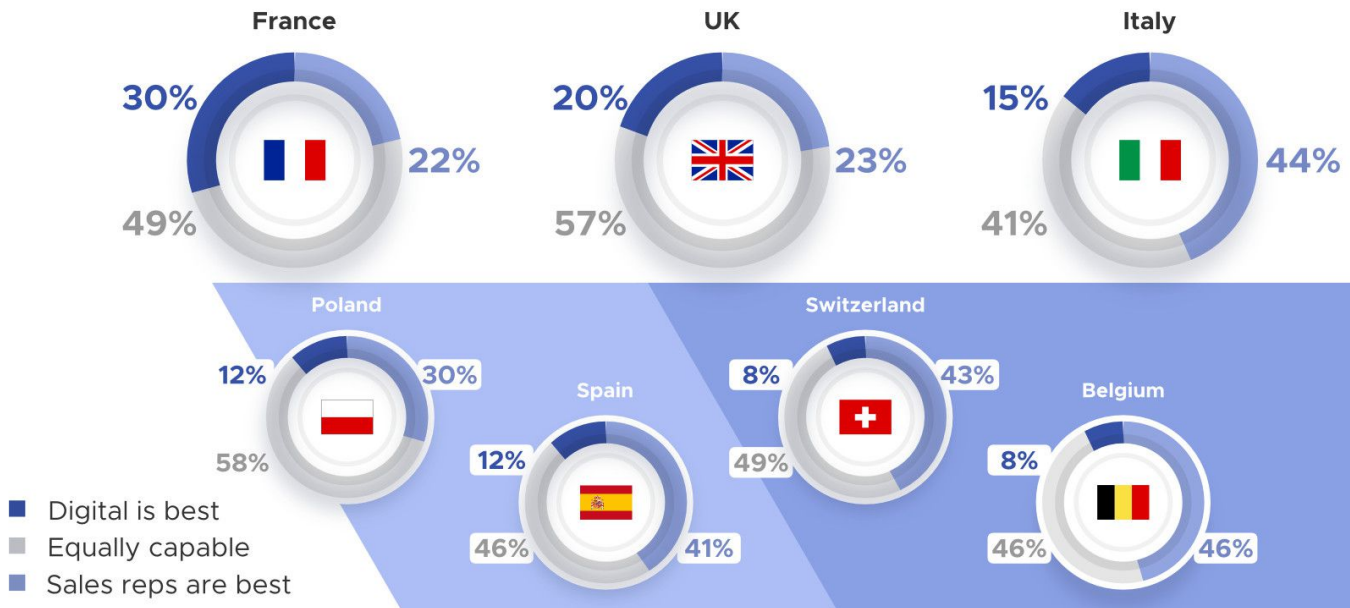


Figure 3. Q. In your experience, how well are sales representatives able to provide information in the following ways, in comparison to online / digital media? Base: Total (1553)

Our findings suggest that HCPs are worried that without reps, there would be no-one to answer their questions; across all markets at least half feel that reps are better at answering their questions immediately. The exception to this is France where physicians show a more balanced view, with as many as 28% instead favouring digital. This is in clear contrast to the 2% who feel in the same in Belgium.

Format best at providing an immediate response to questions

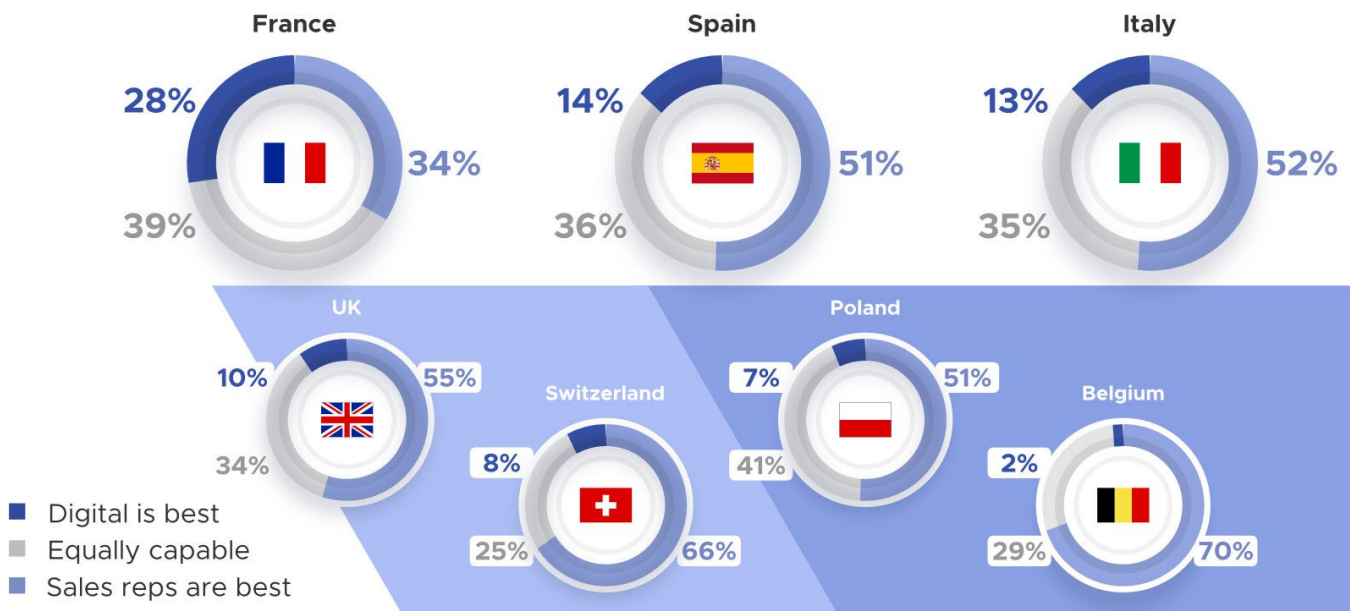


Figure 4. Q. In your experience, how well are sales representatives able to provide information in the following ways, in comparison to online / digital media? Base: Total (1553)

People are clear on the benefits of digital when it comes to matters of convenience. Overall 37% are confident that digital communications fit in better with their schedule. This is a view held consistently across markets, even in those that tend to be less open to the idea of digital communication.

Format best at fitting in with their schedule

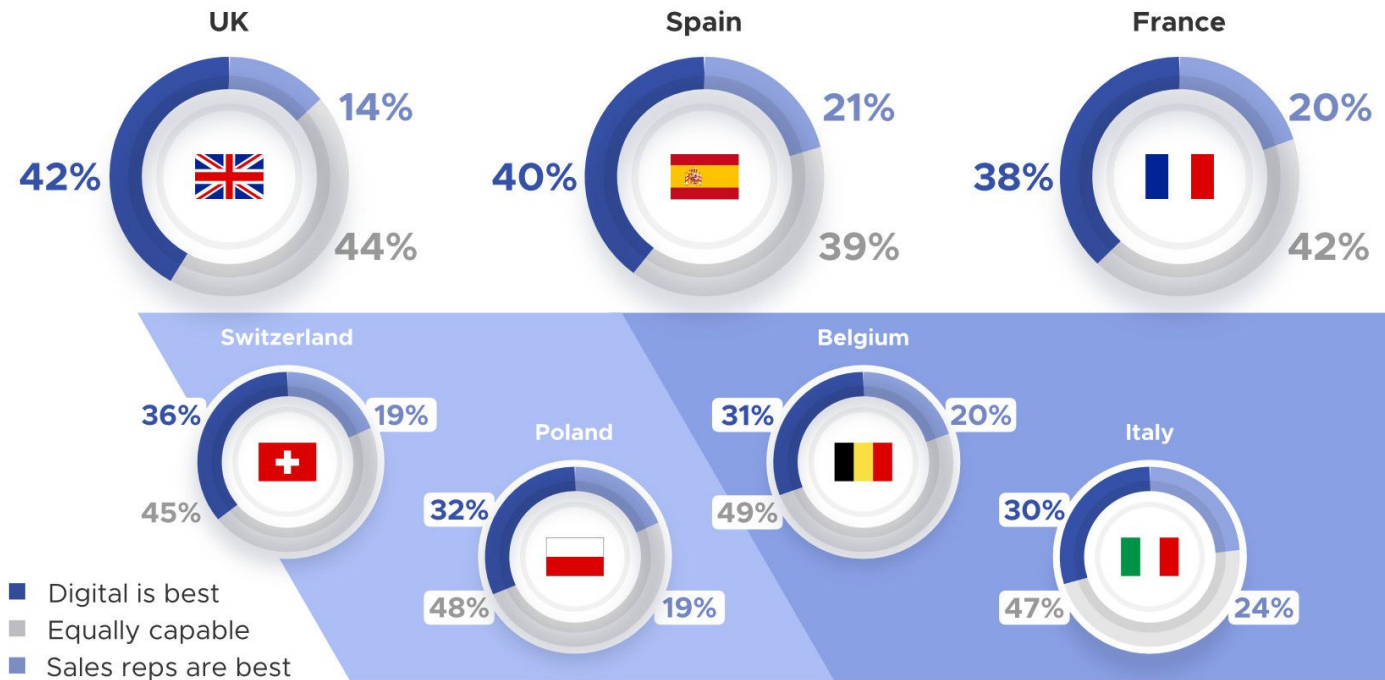


Figure 5. Q. In your experience, how well are sales representatives able to provide information in the following ways, in comparison to online / digital media? Base: Total (1553)

This pattern is also true for types of information that can be accessed at an HCP's ease. Around one third believe that digital is best at providing information that is all in one place, easy to share and delivered regularly.

Physicians want pharmaceutical companies to provide information that is straightforward and easy to understand, therefore they value qualities such as interactivity, personalised content, and information that they do not have to seek out. Since these experiences come hand-in-hand with face-to-face communication, we see only a small minority of HCPs who currently feel digital is capable of doing all of this.

EMBRACING DIGITAL REPS

To remain competitive at a time where the presence of sales reps is increasingly diminishing, it's essential for companies to adapt their approach in this changing landscape. Digital cannot replace sales representatives, nor does it need to.

Multichannel engagement provides the opportunity to bridge the communication gap between increasingly infrequent and sparse face-to-face visits with the convenience and flexibility of digital.

While 60% of HCP-rep contact comes via reps in the US and Europe ¹⁰, only 8% and 6% ¹¹ respectively comes through combined face-to-face and online channels; 48% still receive a 'monochannel' experience, seeing only reps. ¹⁰



Digital can be used in ways that provide the more personalised approach offered by face-to-face meetings, that is currently not associated with this style of communication.

Digital channels can be used for real-time communication with physicians even more regularly than periodic face-to-face visits. E-detailing is already an established means of allowing efficient rep-physician engagement. It can allow for the same level of interactivity, but at the convenience of HCPs, and at a much lower cost for reps. Sales content can be digitised to be accessible at HCPs' convenience, with easily updatable information that can in turn be shared by the audience.

Digital marketing materials (e.g. emails, training videos, webinars) can be used to offer interactive and engaging content, helping to ensure that companies maintain connection with and awareness among HCPs, when it suits their schedules. Content delivered in this way can also be optimised and updated to remain relevant as well as tailored to the physicians receiving it.

Physicians are already using digital platforms in their professional lives and to communicate with their peers. In the survey, Bryter found that 44% regularly use WhatsApp and 21% use LinkedIn to communicate with their colleagues., The foundations for direct connections with brands through digital channels already exist. Currently they are not always being utilised; we found that overall just 14% were using WhatsApp, and 6% LinkedIn, to communicate with pharmaceutical companies. Uptake can vary substantially across countries, in Belgium only 2% of HCPs use WhatsApp to communicate with pharmaceutical companies, whereas 38% of HCPs already are in Spain.

A hybrid approach that combines sales reps with digital communication is clearly an opportunity to better connect with HCPs – an opportunity that is currently being missed.

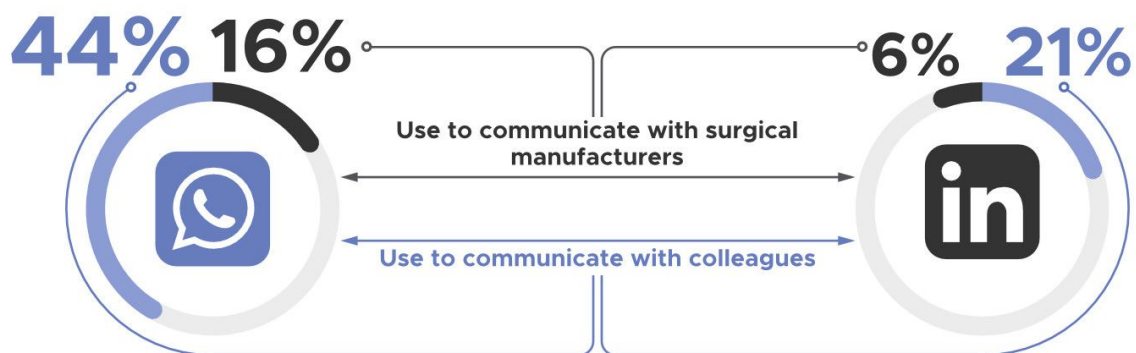


Figure 6. Which of the following types of digital media do you use on a regular basis, and for what purposes? Base: Total (1553)

How can companies strengthen, not replace, customer relationships?

Despite the rise of digital, it is an undeniable fact that sales reps maintain their relevance today. There are an estimated 450,000 sales reps still directly employed by the industry globally, and their related activities account for 62.5% of all sales and marketing expenses¹². The traditional sales rep-HCP model continues to drive sales in most companies and will remain a vital component, with drastic change deemed too risky in the short term.

In a hyper-connected world, the way in which HCPs access information and are influenced is changing. The new generation of HCPs are digitally-native and increasingly moving towards a digital-first approach.

Rather than viewing digital strategies solely as a cost-effective alternative to reps, the question needs to be: how can pharmaceutical companies take advantage of digital strategies to evolve their sales approach?

Today, the most successful reps can easily navigate digital channels such as emails, WhatsApp and Facebook to fuel relationships when a face-to-face meeting isn't possible. The trend is to hire and train reps that can use every channel and take interactions with physicians to the next level. If used in the right way, digital solutions can keep reps connected with physicians more closely than ever. The challenge will be proving to HCPs that digital can provide them with the same support that sales-reps offer, and this may be more challenging in some markets than others.

To do this effectively, companies must have in-depth knowledge of how they should be communicating and connecting with their audiences. They can do this by gaining a greater understanding of HCP attitudes, behaviors, motivators, prescribing habits and preferred information channels through primary market research. Recognising these needs allows reps to deliver an optimal customer experience that is tailored to HCP needs.

Researched and written by
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Bryter provides research that can provide the insight needed to develop a comprehensive and effective digital marketing and communication strategy.

Get in touch to see how we can help you optimize your digital strategy through understanding customer needs.

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