TREASURE DATA

Research

# The New Healthcare Provider Journey:

How pharma brands can deliver a Connected customer experience

# A new healthcare provider journey

The race to capture the attention of healthcare providers (HCPs) when bringing a new drug to market is filled with complex challenges. Pharmaceutical companies must ensure they're making the most out of their investments to maximize impact in a limited period of time.

It's a mission of precision, with pharma marketers, sales reps, customer service, and business leaders mobilizing to identify the right opportunities, the right messaging, and the right strategy to engage providers that are best suited for their products and services.

Treasure Data wanted to understand how HCPs in the United States prefer to interact with pharma companies today. What we found was a new type of provider journey— one that's increasingly omnichannel, with a need for a deeper understanding of individual preferences.

In this report, we'll explore the trends that are defining both in-person and online interactions, and how data can be used to break down silos, create connected experiences, and drive effective outcomes.

In this report, you'll discover:

1. How digital channels are changing the way hcps interact with pharma brands

2. What HCPs want from pharma brand experiences
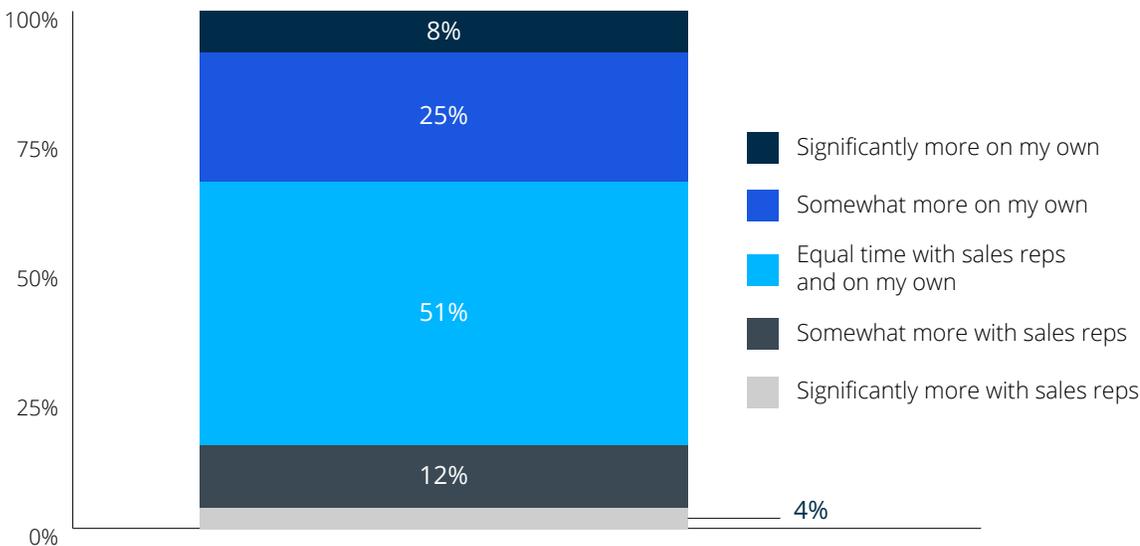
3. How pharma brands can use data to improve HCP experiences

# Beyond in-person interactions: how digital channels are changing the way hcps interact with pharma brands

**84% of healthcare providers now prefer to spend equal or more time researching on their own than working exclusively with sales reps.**

It's no surprise that COVID-19 has accelerated the rate of independent research activity among healthcare providers. Limited in-person meetings and industry events meant HCPs had to seek alternate channels to quickly learn more about new medications and brands. Many providers also work for or are affiliated with healthcare organizations that have more oversight over meeting with sales reps. This shift has widened the pool of resources HCPs now turn to throughout their decision making process, and has resulted in a more complex customer journey with increasing reliance on online tools and services.

## Research method changes since COVID-19



Legend:
- Significantly more on my own
- Somewhat more on my own
- Equal time with sales reps and on my own
- Somewhat more with sales reps
- Significantly more with sales reps

Chart values: 8%, 25%, 51%, 12%, 4%

**55%**
of HCPs say COVID-19 had a moderate to strong impact on how they learn about new medications and brands.

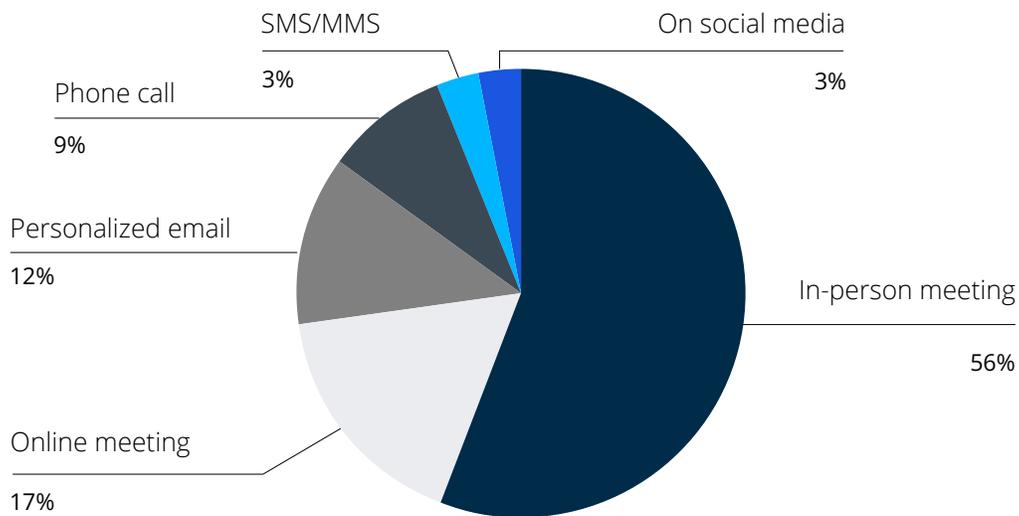**40%**
of HCPs say they are researching more online.

**22%**
of HCPs now rely primarily on online research.

How pharma sales reps conduct one-to-one communications with HCPs is becoming increasingly cross-channel as well, with interactions spread between in-person meetings, virtual meetings, and digital channels. While HCPs find in-person meetings deliver high quality information (90%), nearly three-fourths (74%) of HCPs also value virtual meetings, making them an attractive alternative to in-person engagement.

# 65%
**of HCPs report positive experiences when interacting with sales representatives through omnichannel methods.**

On average, what percentage of the time do you typically interact
With pharmaceutical sales reps about new medications and/or
New brands in each of the following ways?



SMS/MMS 3%
On social media 3%
Phone call 9%
Personalized email 12%
Online meeting 17%
In-person meeting 56%

**Digital channels: A growing market share of influence**

As the information ecosystem expands, so does the sphere of influence. Research gathered from in-person conferences and print publications remains some of the most popular and most influential sources of information for HCPs—a trend to consider as in-person interactions continue to become more accessible in a post-pandemic world.

Despite high engagement with sales reps, HCPs find information they gather online through independent websites almost as influential when it comes to making decisions to prescribe a new medication (46% vs. 50%, respectively).

## Sources used for research vs. perceived influence



Legend:
- **Very or extremely influential on the decision-making process** (dark blue)
- **Sources used to learn about new brands and medications** (light blue)

| Category | Sources used to learn | Very or extremely influential |
|---|---|---|
| Print publications | 67% | 72% |
| Interactions with pharmaceutical sales reps | 62% | 46% |
| Information from conferences/symposia | 60% | 84% |
| Peer-to-peer meetings | 56% | 70% |
| Industry experts/thought leaders | 43% | 77% |
| Pharma websites | 39% | 30% |
| Independent websites | 37% | 50% |
| Brochures/catalogs | 23% | 34% |
| Press from pharma brands | 15% | 35% |
| Mass email from pharma brands | 15% | 27% |
| Mass physical mail from pharma brands | 14% | 17% |
| Social media | 8% | 38% |
| TV advertisements | 8% | 31% |

This poses an interesting challenge for pharmaceutical companies to become an online resource for HCPs, with content and services that add to in-person interactions and connect the provider journey. It also challenges pharma brands to improve the quality of their sales interactions, with a more tailored approach that demonstrates a unique understanding of a healthcare provider's individual patient needs.

Investing in digital channels is an opportunity for pharma marketers to provide foundational content previously delivered during in-person interactions, and enable HCPs to manage their own journey, on their own time. Increased engagement through owned digital touchpoints, like a brand website, also enables pharma companies to collect first-party data—a valuable asset for cultivating direct relationships with providers, and an increasingly important data source in the wake of third-party cookie depreciation and more comprehensive data privacy regulations.
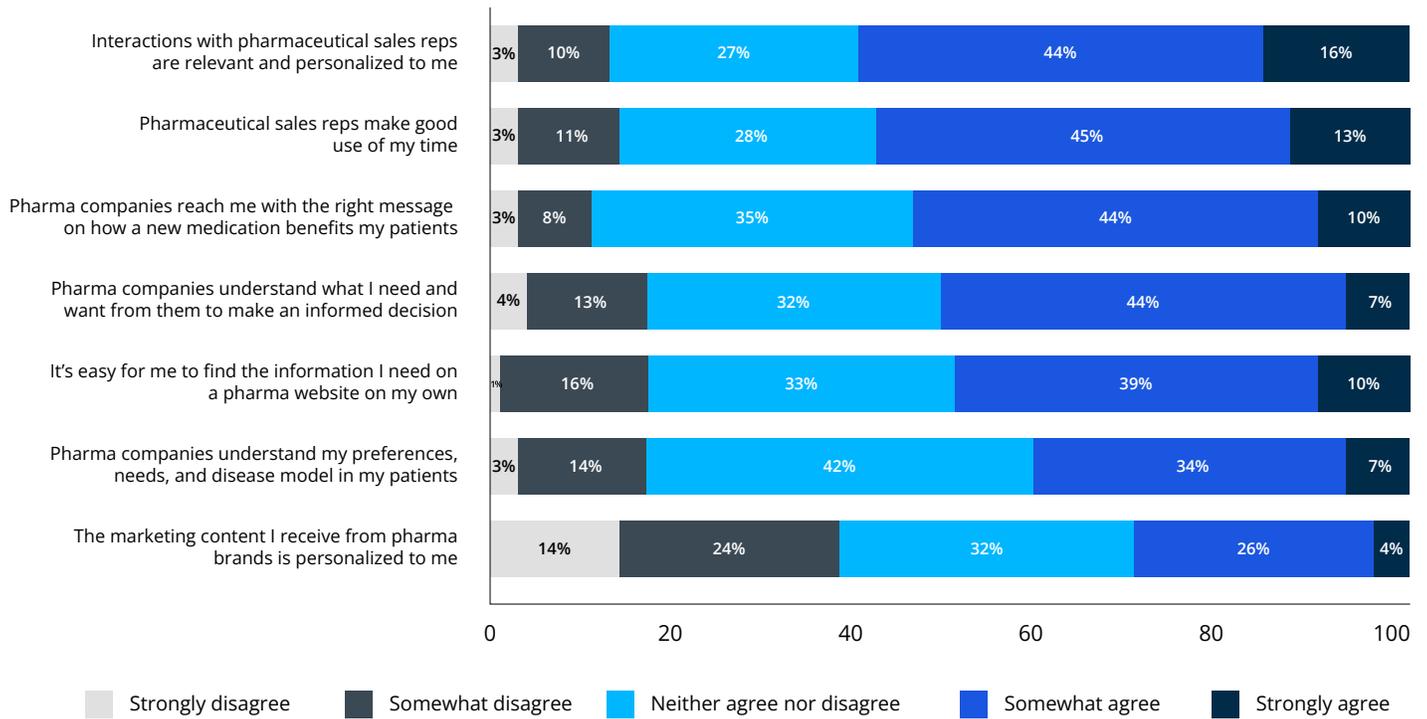
> "There are times in which I'm bombarded by a pharma rep to try to get some face-to-face time in, and there are times in which I'm unable to spend the time. Scheduling time to provide information in a way that respects the doctor's and clinic's time is particularly important now."
>
> —Stroke Specialist

When combined with data collected directly from sales interactions, pharma brands can create a more connected, personalized experience, with insights used to continuously test, iterate, and improve both online and offline interactions. This is the basis of precision marketing—the ability to quickly and accurately respond to customer needs in a relevant way.

## To what extent do you agree with the following statements?

| Statement | Strongly disagree | Somewhat disagree | Neither agree nor disagree | Somewhat agree | Strongly agree |
|---|---|---|---|---|---|
| Interactions with pharmaceutical sales reps are relevant and personalized to me | 3% | 10% | 27% | 44% | 16% |
| Pharmaceutical sales reps make good use of my time | 3% | 11% | 28% | 45% | 13% |
| Pharma companies reach me with the right message on how a new medication benefits my patients | 3% | 8% | 35% | 44% | 10% |
| Pharma companies understand what I need and want from them to make an informed decision | 4% | 13% | 32% | 44% | 7% |
| It's easy for me to find the information I need on a pharma website on my own | 1% | 16% | 33% | 39% | 10% |
| Pharma companies understand my preferences, needs, and disease model in my patients | 3% | 14% | 42% | 34% | 7% |
| The marketing content I receive from pharma brands is personalized to me | 14% | 24% | 32% | 26% | 4% |

Legend: Strongly disagree · Somewhat disagree · Neither agree nor disagree · Somewhat agree · Strongly agree

The current issue, our study finds, is how pharma brands can begin to capture that direct engagement and level of personalization digitally. While more than half of HCPs (60%) believe that interactions with their sales reps are relevant, less than half can find information they need on pharma websites (49%). Further, only 41 percent believe that pharma companies understand their unique preferences and patient needs, and less than one-third (30%) believe the marketing they receive from pharma brands is personalized.

HCPs visit brand websites almost equally as much as independent online sources (39%, 37%, respectively). So, how can pharmaceutical brands make the right investments in their digital channels to improve provider experiences and win market share in the sphere of influence?

**Less than one-third of HCPs believe the marketing they receive from pharma brands is personalized to them.**

# Connecting the dots: what do hcps want from pharma brand experiences?

**HCPs that engage with sales representatives more in-person are also more likely to want self-service tools online.**
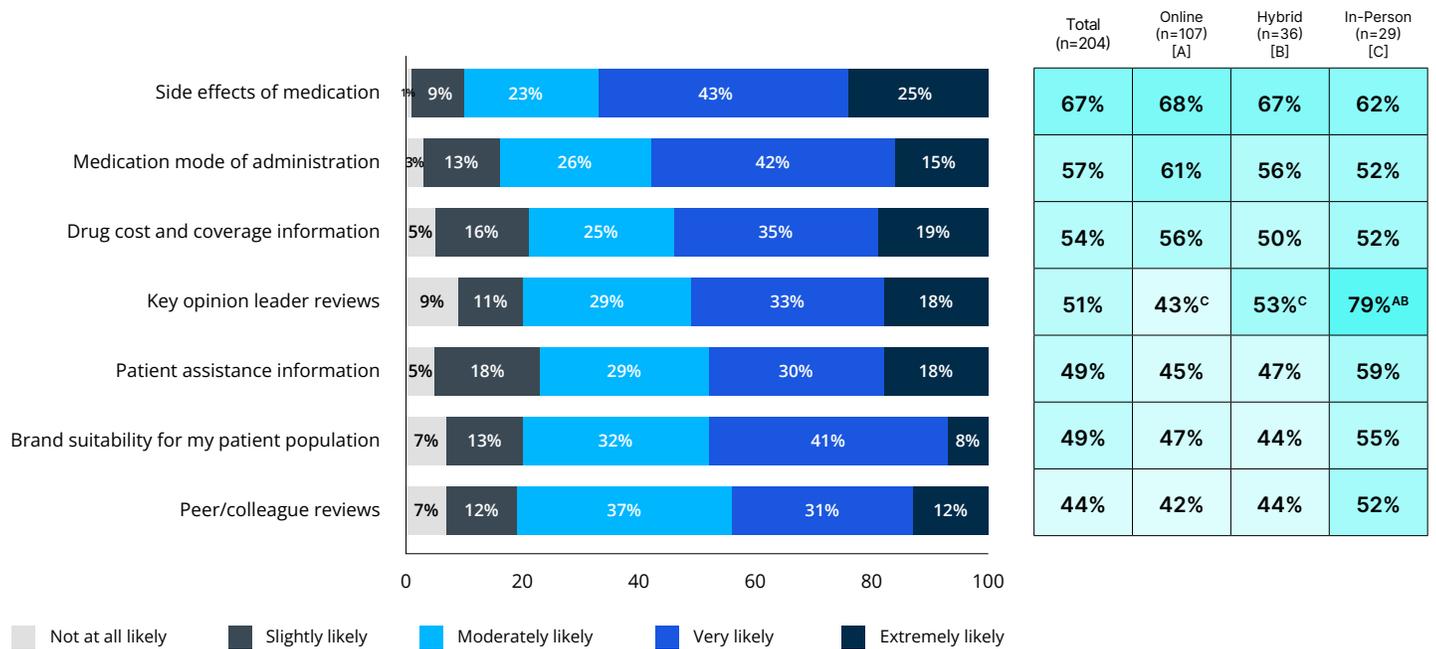
It's the age of information overload. In the case of HCPs, our research found that providers are actively looking for information and services online—it's just that they often don't find exactly what they need, and the provider journey can vary. Providers also want information quickly—often, they're searching for something specific, and may not want to wait to get what they are looking for. Pharma brands that understand how different HCPs want to interact can differentiate how they target and deliver information, tools, and services to different audiences.

When asked about how HCPs interact with brands, and what gaps remain, three core trends emerged:

**1. The need for information**

HCPs primarily use pharma brand websites to access scientific and financial information about medications they're researching, including side effects, mode of administration, and coverage information.

## Information searched when using a pharma website

| | Not at all likely | Slightly likely | Moderately likely | Very likely | Extremely likely | Total (n=204) | Online (n=107) [A] | Hybrid (n=36) [B] | In-Person (n=29) [C] |
|---|---|---|---|---|---|---|---|---|---|
| Side effects of medication | 1% | 9% | 23% | 43% | 25% | 67% | 68% | 67% | 62% |
| Medication mode of administration | 3% | 13% | 26% | 42% | 15% | 57% | 61% | 56% | 52% |
| Drug cost and coverage information | 5% | 16% | 25% | 35% | 19% | 54% | 56% | 50% | 52% |
| Key opinion leader reviews | 9% | 11% | 29% | 33% | 18% | 51% | 43%[C] | 53%[C] | 79%[AB] |
| Patient assistance information | 5% | 18% | 29% | 30% | 18% | 49% | 45% | 47% | 59% |
| Brand suitability for my patient population | 7% | 13% | 32% | 41% | 8% | 49% | 47% | 44% | 55% |
| Peer/colleague reviews | 7% | 12% | 37% | 31% | 12% | 44% | 42% | 44% | 52% |

Legend: Not at all likely, Slightly likely, Moderately likely, Very likely, Extremely likely

**80%**
of healthcare providers
research clinical trials data.

**More than 50%**
of healthcare providers
research conditions, risks,
and data on patient benefits.

1 in 4 healthcare providers find it
challenging to find cost information and
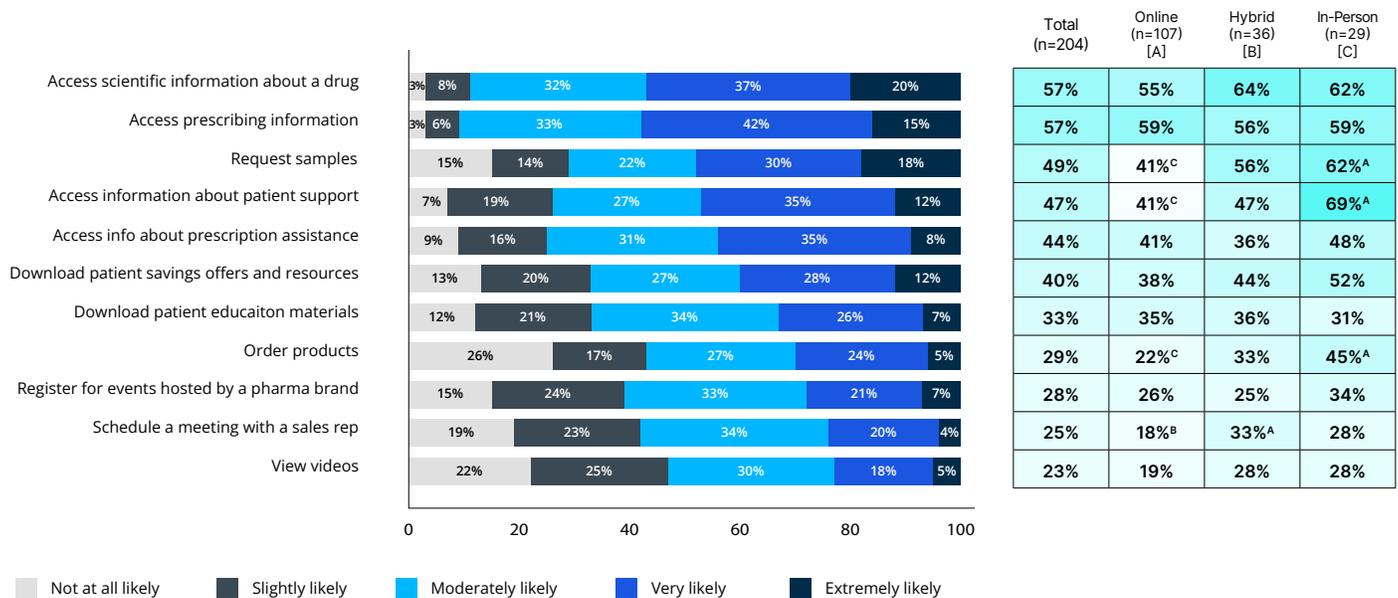proven data on patient benefits.

## 2. A desire for self-service

A similar trend can be seen in the types of services HCPs currently engage with when interacting with pharma brand sites. Providers who rely on learning about drugs in-person are more likely to use a pharma website to order products (45%), access patient support info (69%), and request samples (62%) than online researchers (22%, 41%, 41%, respectively). HCPs also wanted more access to digital scheduling tools to coordinate meetings with sales reps, indicating that in-person interactions can facilitate future online activity, and vice versa.

When asked what other information pharma companies could offer online to improve the experience, providers listed services like access to information on dosing, costs, and comparisons with competing brands.

## Likely activity when using a pharma website

| | Total (n=204) | Online (n=107) [A] | Hybrid (n=36) [B] | In-Person (n=29) [C] |
|---|---|---|---|---|
| Access scientific information about a drug | 57% | 55% | 64% | 62% |
| Access prescribing information | 57% | 59% | 56% | 59% |
| Request samples | 49% | 41%ᶜ | 56% | 62%ᴬ |
| Access information about patient support | 47% | 41%ᶜ | 47% | 69%ᴬ |
| Access info about prescription assistance | 44% | 41% | 36% | 48% |
| Download patient savings offers and resources | 40% | 38% | 44% | 52% |
| Download patient educaiton materials | 33% | 35% | 36% | 31% |
| Order products | 29% | 22%ᶜ | 33% | 45%ᴬ |
| Register for events hosted by a pharma brand | 28% | 26% | 25% | 34% |
| Schedule a meeting with a sales rep | 25% | 18%ᴮ | 33%ᴬ | 28% |
| View videos | 23% | 19% | 28% | 28% |

Chart data (Not at all likely / Slightly likely / Moderately likely / Very likely / Extremely likely):

- Access scientific information about a drug: 3% | 8% | 32% | 37% | 20%
- Access prescribing information: 3% | 6% | 33% | 42% | 15%
- Request samples: 15% | 14% | 22% | 30% | 18%
- Access information about patient support: 7% | 19% | 27% | 35% | 12%
- Access info about prescription assistance: 9% | 16% | 31% | 35% | 8%
- Download patient savings offers and resources: 13% | 20% | 27% | 28% | 12%
- Download patient educaiton materials: 12% | 21% | 34% | 26% | 7%
- Order products: 26% | 17% | 27% | 24% | 5%
- Register for events hosted by a pharma brand: 15% | 24% | 33% | 21% | 7%
- Schedule a meeting with a sales rep: 19% | 23% | 34% | 20% | 4%
- View videos: 22% | 25% | 30% | 18% | 5%

Legend: ☐ Not at all likely  ■ Slightly likely  ■ Moderately likely  ■ Very likely  ■ Extremely likely

**62%** of HCPs that primarily interact with pharma brands in-person are likely to request samples online.
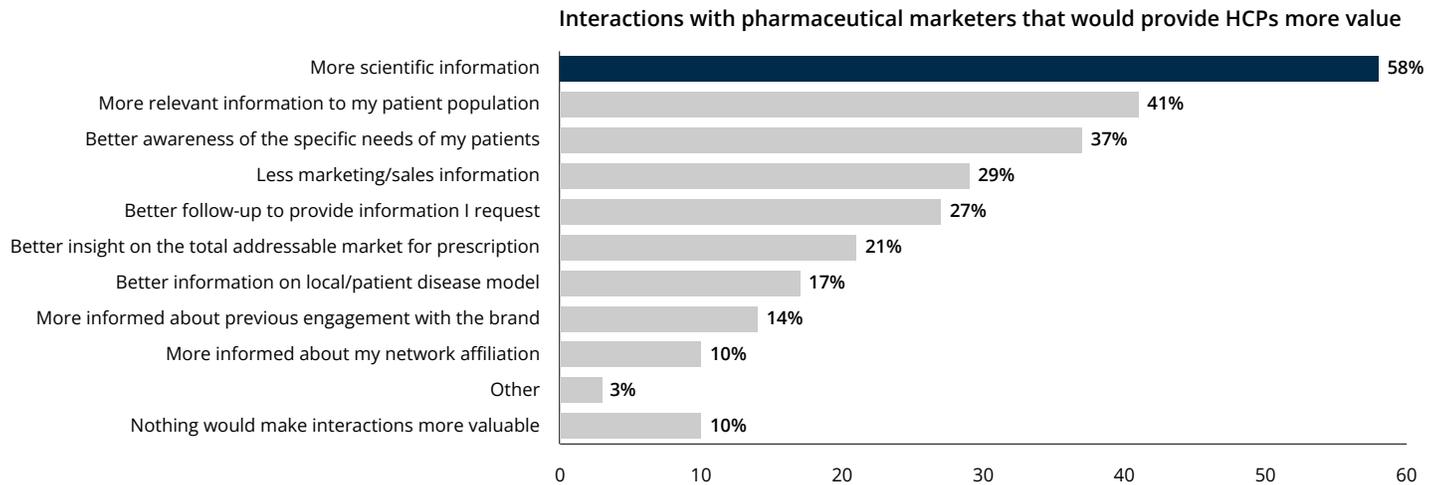
**45%** of HCPs that primarily interact with pharma brands in-person are likely to order products online.

While chatbots are not widely used, those who primarily research in-person are significantly more likely to use a chatbot to access information on patient support **(53%)** than those who research online **(24%).**

## 3. More knowledgeable sales reps

HCPs value sales discussions more when sales reps demonstrate a deep understanding of their specific needs, and come prepared with information that is contextualized to their particular patient population, pain points, and prior relationship with the brand. HCPs also expressed a desire to move away from more generalized marketing and sales messaging, preferring conversations where sales reps were more familiar with the provider's network affiliations, follow-up requests, and past engagements that they may have had with the brand.

**Interactions with pharmaceutical marketers that would provide HCPs more value**

| Category | Percentage |
|---|---|
| More scientific information | 58% |
| More relevant information to my patient population | 41% |
| Better awareness of the specific needs of my patients | 37% |
| Less marketing/sales information | 29% |
| Better follow-up to provide information I request | 27% |
| Better insight on the total addressable market for prescription | 21% |
| Better information on local/patient disease model | 17% |
| More informed about previous engagement with the brand | 14% |
| More informed about my network affiliation | 10% |
| Other | 3% |
| Nothing would make interactions more valuable | 10% |

When asked about improving the in-person experience, the need for more personalized and relevant content was clear:

> **"More to-the-point, relevant discussions during sales rep face-to-face meetings."**

> "Better understand what we are looking for in terms of how to help patients. Make prescribing and accessing copay [information] faster and easier."
>
> —Stroke Specialist

> "Identify my practice needs and refer individualized information."
>
> —Heart Disease Specialist

> "Provide me with the data on which their drug was approved so I can analyze it myself."
>
> —Cancer Specialist

> "Peer reviewed articles and information on what practitioners are seeing in real time."
>
> —Orthopedic Specialist

> "More transparency about products in trials and development."
>
> —Cancer Specialist

> "Be less of a salesperson and more of a partner in care."
>
> —Stroke Specialist

# Empowering organizations: how pharma brands can use data
# To improve hcp experiences

**A connected customer data platform gives pharma brands the power to understand and improve relationships with HCPs.**

Pharma brands now have the opportunity to use data to help inform and inspire more direct and meaningful interactions with healthcare providers, while improving the effectiveness of their sales and marketing initiatives.

**1**

### Understand individual HCP needs better by connecting data from across different touchpoints and channels

HCPs now interact with pharma brands in a growing number of ways. Each interaction, whether online or offline, is an opportunity to deepen relationships and learn more about the provider. However, the data needed to understand the full provider journey often exists in silos—collected through a variety of different channels, and stored separately through different technology platforms. Connecting these data points allows marketers, sales reps, customer service, and other members of the organization to have full visibility of the entire provider journey—and all of the nuances that come with it.

**2**

### Define new audiences and develop personalized experiences

Let's talk about those nuances. Our study found that broad marketing messaging and sales outreach often falls flat and is perceived as less valuable by HCPs because it's deemed not relevant or personalized.

HCPs now have the ability to research in-person, online, or some combination of both. Different providers may also have different preferences for how they want to engage, what types of information they value, and how they want to receive different types of information.

With a single view of the customer, sales and marketing professionals can clearly uncover these insights to define segments that inform more targeted messaging and campaigns. Sales and marketing teams can also tailor outreach to suppress certain audiences so that they're only receiving the information that's most relevant to them—ensuring that only the most relevant information is delivered through the right channels, at the right time.

## 3  Equip sales reps with contextual data from prior interactions

Interacting with sales representatives is still an important part of the healthcare provider journey. But how sales reps deliver value is changing—and efficiency is key when considering cost, speed, and ROI.

HCPs expect sales reps to have a deeper understanding of their specific needs, preferences, and prior interactions. By tapping into current and historical engagement data from both online and offline sources, sales reps can quickly develop a more contextualized approach to in-person meetings, and improve the quality of content and information they deliver. Further, real-time insights delivered from digital touchpoints can help sales reps identify when HCPs may be ready for a conversation or a follow-up, and make those connections with the right information in tow. Sales reps also have an opportunity to educate providers about online tools and services that are available to continue the conversation in between in-person interactions.

## 4  Make self-serve digital experiences accessible and informative

Our research found that HCPs actively turn to digital tools and services to access information, order samples, and learn more about patient costs and benefits. Pharma brands have the opportunity to use data gathered from these first-party interactions to make strategic investments in improving website capabilities and information offered online—like self-service portals, or improving chatbot experiences. This data can also be used to maximize the efficiency and value of their digital channels, while improving personalization.

## 5  Predict next-best action to make smart recommendations for outreach

Not only does connected customer data inform real-time outreach—it can also be used to help predict and recommend the next-best action sales, marketing, and customer service professionals can take based on where a provider is in their journey. The goal is to ensure HCPs are nurtured with a unified and connected experience, while improving outcomes and ROI.

## 6  Iteratively test and learn to improve sales and marketing initiatives

This is an ongoing process. With each interaction, pharma brands can learn what's working, what isn't, and where they need to go next. Iteratively testing and learning across the organization enables deeper precision in defining audiences, accounting for attribution, and the messaging and development of new tools and services to better help providers. With data delivered in near real time, business leaders can make these decisions quickly to optimize spend or maximize the value of their investments.

CONCLUSION

# Creating connections with a customer data platform

Connecting customer data from across the organization starts by having the right technology in place. A customer data platform (CDP) serves as the foundation for your data strategy, with the ability to ingest, analyze, and unify data from multiple sources. This enables organizations to uncover, dedupe, and enrich insights that are typically siloed between the CRM, CMS, DMP, customer service, logistics, and other experience or analytics platforms to create a single source of truth.

Artificial intelligence and machine learning capabilities add an additional layer of precision, with the ability to rapidly ingest and process millions of rows of event data in seconds to deliver near real-time views of provider activity. Iterative learning enables stronger predictive capabilities, with the ability to recommend the best next-action recommendations to marketers, sales reps, or customer service professionals to engage with providers.

Meeting HCPs where they are will continue to be an important part of how pharmaceutical companies plan and execute their sales and marketing strategy during some of the most pivotal moments in the lifetime of a product. A CDP can help organizations make the connections that matter, when they matter most.

# Methodology

Survey results are based on a sample of 204 medical professionals living in the United States that specialize in one of the following categories: Cancer, Emergency/Diabetes, Heart Disease, Orthopedic/Pain, Respiratory Diseases, or Stroke. The survey was conducted in May 2022 and administered online.

## Respondent characteristics

### Age (n=204)

| | |
|---|---|
| 18 to 44 | 24% |
| 45 to 54 | 37% |
| 55 and older | 28% |
| 65+ | 12% |

### Job Role (n=204)

| | |
|---|---|
| Allergy, Asthma & Immunologist | <1% |
| Anesthesiologist | <1% |
| Cardiologist | 11% |
| Dermatologist | 6% |
| Endocrinologist | 7% |
| Gastroenterologist | 1% |
| Hematologist | 2% |
| Internist | 4% |
| Neurologist | 18% |
| Oncologist | 16% |
| Pulmonologist | 16% |
| Surgeon | 17% |

### Oncologist Speciality (n=204)

| | |
|---|---|
| General Oncologist | 3% |
| Medical Oncologist | 41% |
| Radiation Oncologist | 6% |
| Hematologist-Oncologist | 47% |
| Pediatric Oncologist | 3% |

### U.S. Region (n=204)

| | |
|---|---|
| Northeast | 26% |
| Midwest | 21% |
| South | 32% |
| West | 22% |

### Cardiology Speciality (n=23)

| | |
|---|---|
| General Cardiologist | 48% |
| Interventional Cardiologist | 52% |

### Surgeon Speciality (n=23)

| | |
|---|---|
| Orthopedic Surgeon | 94% |
| Thoracic Surgeon | 6% |

### Decision Maker (n=204)

| | |
|---|---|
| Primary decision maker | 82% |
| Share decision-making authority | 18% |

### Medical Facility (n=204)

| | |
|---|---|
| Academic medical center | 20% |
| Community rural hospital | 3% |
| Community urban hospital | 8% |
| Private hospital | 2% |
| Government hospital | 1% |
| Physician-owned clinic | 8% |
| Private physician practice | 41% |
| Hospital/System owend practice | 17% |

### Employment Status (n=204)

| | |
|---|---|
| Full-time | 93% |
| Self-employed | 7% |

### Years Experience (n=204)

| | |
|---|---|
| Less than 2 years | 0% |
| 2 to 5 years | 3% |
| 6 to 10 years | 10% |
| 11 to 15 years | 20% |
| 16 to 30 years | 54% |
| More than 30 years | 13% |

# TREASURE DATA

Treasure Data empowers the world's largest and most innovative companies to drive connected customer experiences that increase revenue and reduce costs. Built on a big data foundation of trust and scale, Treasure Data is a customer data platform (CDP) pioneer and continues to reinvent the CDP by putting AI and real-time experiences at the center of the customer journey.

Our CDP gives customer-centric teams across Fortune 500 and Global 2000 companies – marketing, sales, service, and more – the power to turn customer data into their greatest treasure. Visit www.treasuredata.com to learn more.

Join Treasure Data's global CDP community at CDP World (cdpworld.com), its annual summit for marketing and data leaders.