



REUTERS EVENTS™

THE HCP ENGAGEMENT TRANSFORMATION: LATEST TRENDS AND ACTIVITIES

How digital channels have dramatically reshaped the engagement landscape

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EXECUTIVE SUMMARY

HCP engagement is undergoing a dramatic reformation, spurred on by the necessity to meet changing customer needs. This white paper explores the latest trends and developments revealed in our 2023 survey of over 200 industry leaders. We examine how executives across marketing, commercial and medical affairs functions are executing the opportunity of digital transformation, including omnichannel engagement and automation, both separately and collaboratively.

The paper also analyses which channels and activities are receiving the most attention now and how this is set to change in the coming three to four years. Promotional and educational activities will be studied by function to give granular-level insights into emerging trends. Finally, throughout the paper, we tap into a wealth of expertise from industry leaders who shared their input.

THE CONTINUED RISE OF OMNICHANNEL AND AUTOMATION IS DRIVING COLLABORATION

The biggest change to engagement activity that our survey respondents report is the growing importance of omnichannel, new metrics and automation opportunities. Marketing and medical affairs functions are also becoming more aligned, with high levels of collaboration that are expected to rise further in the coming years.

AN EMERGING HYBRID MODEL OF DIGITAL AND IN-PERSON ENGAGEMENT CONTINUES TO SHIFT FOCUS BETWEEN CHANNELS.

Hybrid engagement is here to stay. In-person engagement is resurgent, but investment in virtual equivalents continues apace. Digital advertising, virtual meetings and events, email marketing and social media activities are widely expected to receive increased funding by 2026 according to our survey.

“HCP ENGAGEMENT IS COMPETITIVE. WE MUST MOVE BEYOND POKING IN THE DARK AND REALLY UNDERSTAND HCPS. IF WE CAN OFFER SOMETHING THAT’S A WIN-WIN, CUSTOMERS ARE STILL VERY WILLING TO ENGAGE.”

Daniel Tertel, Head of Commercial Excellence EMEA, Bayer Pharmaceuticals

MEDICAL EDUCATIONAL INVESTMENT IS EXPECTED TO INCREASE.

Investment in educational products offered by both medical and commercial functions are expected to increase by 2026. Educational offerings are becoming more aligned as HCPs seek convenient ways to keep abreast of new information and developments in their fields.

When deciding what content and activities to leverage, quality of content, physician information needs and availability of metrics to track effectiveness rank most highly for both promotional and educational activities.

Denis Conlon, VP of Global Marketing at Elsevier – Pharma and Life Sciences Solutions, emphasises the dramatic change in how pharmaceutical and medical device companies are engaging with HCPs:

“There’s been a big shift. Many physicians today have been utilising digital tools and technology throughout their training. The challenge still remains: How can we best engage and educate our HCP audience with new messages about branded products or new information that may help them diagnose or treat individual patients? The format of those discussions and the content that they’re ingesting to make those decisions has changed dramatically.” (Denis Conlon, Elsevier)

INTRODUCTION

Time-pressed HCPs are being bombarded with so much scientific content—with over one million new articles on biomedicine published each year— that they are seeking convenient access to easily digestible medical information and research. (1) Organisations that provide it to them will be rewarded by winning their trust and attention.

Recently, due to macro-environmental forces converging, healthcare providers everywhere are facing unprecedented economic pressures and demand for care. Mounting demands on HCPs are further narrowing the available time for consuming medical information and research, escalating the need for more easily accessible and comprehensible resources. (2)

In fact, a 2022 study involving 1,700+ physicians has shown that when choosing which content to read or engage with, credibility is king, with 81–83% of HCPs in the US, EMEA and APAC rating a credible source as the most important deciding factor. This was followed by up-to-datedness (72%), with ease of discovery (58%) coming third. (3)

In response, the pharmaceutical industry is accelerating efforts to deliver an agile, personalised customer experience for HCPs that serves them the resources they need at optimal convenience.

To find out the latest trend developments in HCP engagement in 2023, we surveyed 198 global industry executives in medical affairs, marketing, commercial strategy and product or brand marketing and spoke with [six leading experts](#) to explore the trends the survey uncovers. The survey was a follow-up of research done in 2021 to allow industry evolution to be charted. (4)

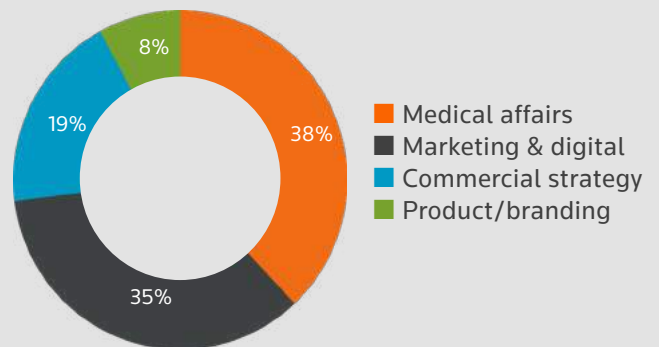
About the survey

We surveyed 198 leading pharma, biotech and medtech executives around the globe to take part in our latest industry trends research, focusing on those with responsibilities for regions that include North America, Europe and Asia Pacific. Regions are usually not exclusive.

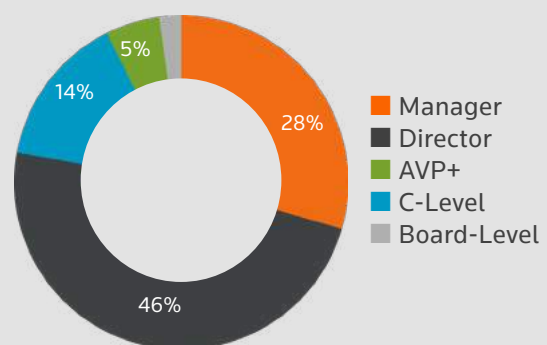
GEOGRAPHICAL RESPONSIBILITY



FUNCTIONAL RESPONSIBILITY



LEVEL OF SENIORITY



We selected respondents working in marketing & digital, medical affairs, product/brand marketing and commercial strategy, manager-level and above, to include in the research.

We explored channel and content priorities for promotional and educational activities, how content decisions are being made at a tactical level and how these will likely change in the short to medium term. Additionally, we asked about operational themes, such as working practices and cross-functional collaboration.

As pharma ups its game to give HCPs what they want and so clearly need – convenient ways to access high-quality, up-to-date information and resources – competition is bound to increase. Offering convenient, relevant, trusted and timely content on demand is now a clear differentiator in the marketplace.

“HCP engagement is competitive”, says Daniel Tertel, Head of Commercial Excellence EMEA at Bayer Pharmaceuticals. “We must move beyond poking in the dark and really understand HCPs. If we can offer something that’s a win-win, customers are still very willing to engage.”

“HOW CAN WE BEST ENGAGE AND EDUCATE OUR HCP AUDIENCE WITH NEW MESSAGES ABOUT BRANDED PRODUCTS OR NEW INFORMATION THAT MAY HELP THEM DIAGNOSE OR TREAT INDIVIDUAL PATIENTS?”

Denis Conlon, VP of Global Marketing at Elsevier



LATEST TRENDS IN HCP ENGAGEMENT

The biggest change to engagement activity that the survey respondents report is the growing importance of omnichannel, new metrics and automation opportunities.

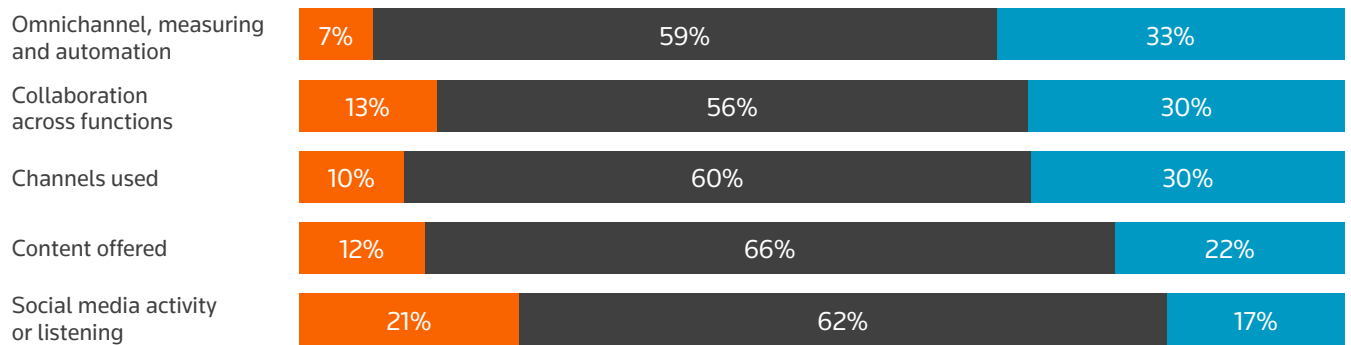
Another top priority for the industry, as revealed in conversations with experts, is finding a balanced blend between virtual and in-person activities. Investment in digital engagement offerings and capabilities continues alongside renewed interest in face-to-face

contact in some regions. Some organisations are utilising blended offerings that combine elements of in-person and digital engagement to optimise investment and leverage multiple channels.

Educational activities are also receiving heightened attention across functions, and medical affairs is increasingly providing strategic insights to other functions gleaned from data collected through medical and educational activities. Marketing and commercial teams are seeking to partner with customers and co-create value offerings, such as patient education, webcasts of scientific events and education platforms.

IN THE PAST 18 MONTHS, HAVE YOU WITNESSED CHANGES IN HOW YOUR PARTICULAR BUSINESS FUNCTION WITHIN YOUR COMPANY IS ENGAGING WITH HCPS?

Marketing, commercial and product or brand marketers



Medical affairs

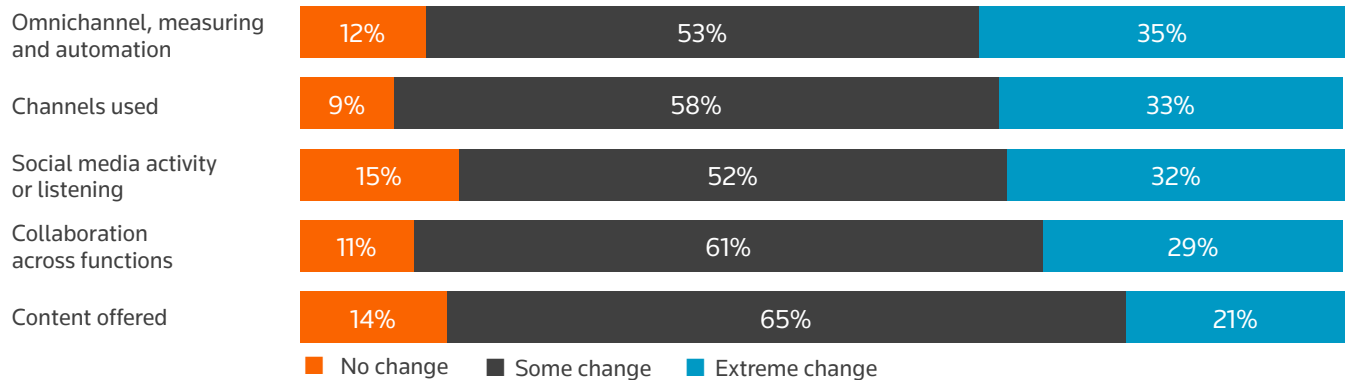


Figure 1. Graph showing the latest trends in HCP engagement, 2023 Reuters Events Pharma survey.

OMNICHANNEL DATA AND ANALYTICS CONTINUES TO RISE

Our 2023 survey revealed rapid, industry-wide changes in capabilities around omnichannel HCP engagement, data and analytics (to allow engagement to be measured and to increase automation). Just over 90% of respondents in marketing, commercial and branding and almost 90% of those in medical affairs have seen some change or extreme change here in the last 18 months (see Fig. 1).

This year, 96% of marketing and commercial respondents said they were somewhat, very or extremely likely to invest in omnichannel and automation capabilities for marketing purposes. Furthermore, 88% of respondents expect to see an increase in funding by 2026 (see Fig. 2).

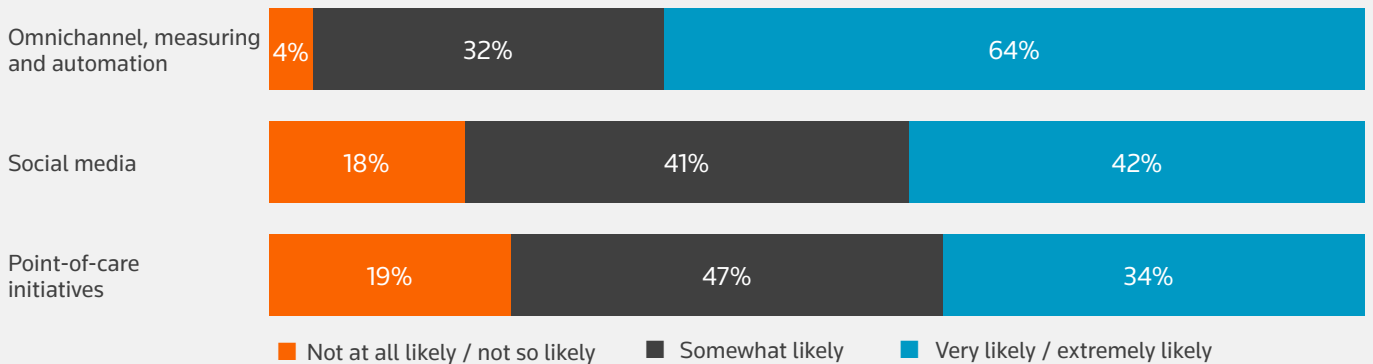
While commercial teams may have initially led the way in omnichannel engagement capabilities, it has become increasingly clear that medical affairs play a vital role in any comprehensive omnichannel initiative, and cross-functional collaboration is essential for achieving maximum impact.

Medical affairs teams are leveraging modular content strategies and creating bite-sized content. This reduces duplication of effort in content creation, makes updating it easier and, crucially, makes it possible to tailor content for individual HCPs. Additionally, modular content on digital channels allows data on engagement to be measured.

Having better access to data on HCP engagement enables content preferences, knowledge levels and unmet needs to be assessed and makes pharma more agile in adapting and modifying the content served. According to Eddie Power, principal for emPower Medical LLC and previously VP of medical affairs for North America at Pfizer, it is HCPs that ultimately determine the format of the new engagement model.

“The traditional push model —which involved pharma determining the data to be communicated— is being replaced by an approach where healthcare professionals have more control”, says Power. “Providing information according to their needs and preferences will be essential in the competition for HCP attention.”

How likely is your company to invest in 2023 in the following promotional marketing channels?



Respondents expecting budget to increase by 2026.

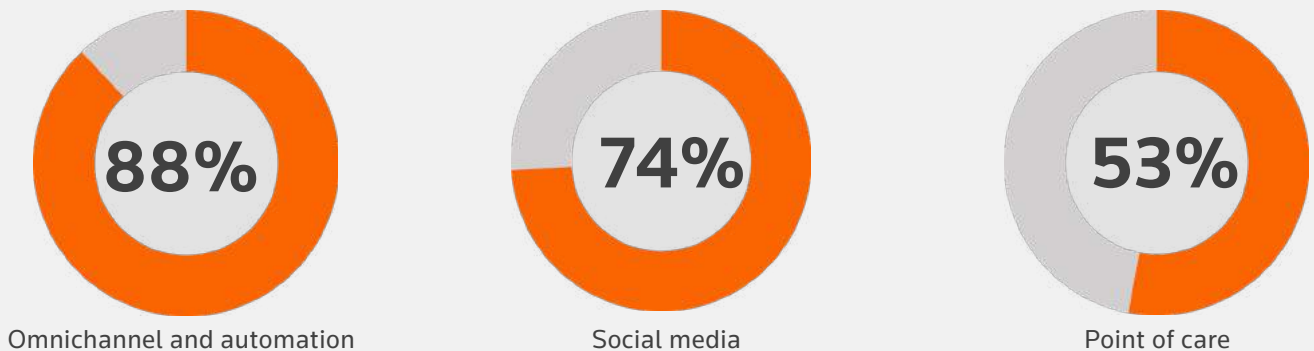


Figure 2. Graphs showing expected investment by channel in 2023 and by 2026, 2023 Reuters Events Pharma survey.

To meet HCP needs, AI tools are offering new ways to analyse and measure engagement data and so provide deeper, more valuable insights, says Power:

“Artificial intelligence is beginning to drive a number of advanced analytics solutions and subsequently is becoming more predictive and generative. That gives much more scope; we just need to be open to it and ready to embrace that change.” (Eddie Power, emPower Medical LLC)

Marketers’ expectations are rising when it comes to driving insights from the data they pay for. They want data that helps link engagement activity with outcomes and so helps demonstrate its ROI. Data that allows HCP engagement teams – whether integrated or split by function – to execute ROI analysis and determine the return on marketing spend has become a necessity, according to Conlon:

“One of the things that we constantly talk about is physician-level data (PLD). Many customers, especially on the media side, are looking to see if an individual physician, potentially one of their target audience members, is engaging with a particular content solution. With advanced analytics, one can measure an HCP ingesting a particular piece of content and then relate that activity to prescription sales, which can also be measured per physician, to see if there was a direct impact resulting from ingesting that content and whether it has positively impacted the way that HCP is prescribing drugs.” (Denis Conlon, Elsevier)

“ARTIFICIAL INTELLIGENCE IS BEGINNING TO DRIVE A NUMBER OF ADVANCED ANALYTICS SOLUTIONS AND SUBSEQUENTLY IS BECOMING MORE PREDICTIVE AND GENERATIVE. THAT GIVES MUCH MORE SCOPE; WE JUST NEED TO BE OPEN TO IT AND READY TO EMBRACE THAT CHANGE.”

Eddie Power, Principal, emPower Medical LLC

To what degree are medical affairs, commercial and marketing teams collaborating to drive change in HCP engagement in 2023?

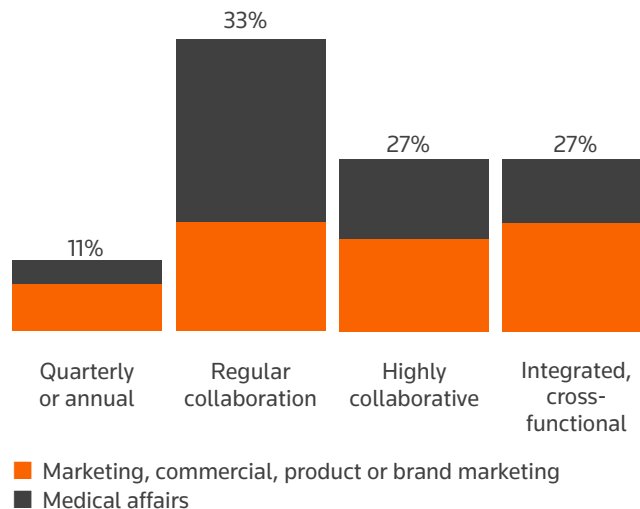


Figure 3. Graph showing collaboration levels between functions, 2023 Reuters Events Pharma survey.

COLLABORATION BETWEEN FUNCTIONS INCREASING

Our survey reveals that key pharma functions are now starting to collaborate far more closely than ever before and see it as a key to unlocking true omnichannel capabilities. In the last 18 months, there has been a dramatic shift in the levels of collaboration across medical affairs, commercial, and marketing functions. Ninety percent of respondents in medical affairs and 86% of those in marketing and commercial roles have reported experiencing significant to extreme changes in cross-functional collaboration levels. Of those that had witnessed, 27% indicated that they are operating in integrated, cross-functional teams, whilst a further 27% described a highly collaborative approach (see Fig. 3).

When asked to comment on the survey results, Power interpreted the even split between medical affairs and commercial respondents as a sign that both functions were aligned regarding the need for collaboration.

“It’s positive that there is so much more regular collaboration happening”, says Power. “The plethora of real-time data that we have access to mandates regular collaboration; I don’t think you can afford to sit and wait for three months to look at the digital metrics you’re working on.”

Most of the experts we spoke to predicted that this trend of increased collaboration is likely to continue. However, caution is needed, in terms of lines and boundaries, to stay mindful of regulatory requirements, according to Sandra Casiano, Global Senior Medical Director at Sanofi:

“From an external audience perspective, they don’t really understand the difference between medical affairs and commercial or marketing functions. I think it’s important that we have a very collaborative structure, and that engagement is very collaborative. But I think it’s important not to blur the lines and be very clear on what medical does and what commercial does.” (Sandra Casiano, Sanofi)

SOCIAL MEDIA ACTIVITIES

Both marketing and medical affairs teams are increasingly leveraging and analysing social media, to both engage HCPs and gather insights. Social listening is the most common activity underway this year, with 83% of all respondents to our survey indicating projects in this area, particularly within medical affairs (see Fig. 4). Many organisations are monitoring channels without getting involved for fear of regulatory repercussions or investing in the wrong place; others are waiting to get involved until more is known about how to leverage them.

“Junior physicians, as well as the more experienced, are following clinicians with more expertise”, says Casiano, “as well as clinicians that make information easily digestible”. Digital opinion leaders, also known as DOLs, who have influence over a large audience or following, are being identified through social listening. In some cases, efforts are being made to partner with them.

According to Power, the rise in the importance of DOLs teaches a critical point. “I think this is showing us that our focus in the past was to rely too heavily on academic key opinion leaders who publish in scientific journals or present at congresses”, says Power, “Now we see that there are many more healthcare professionals out there who are active and communicate without necessarily going through traditional scientific channels.”

The use of LinkedIn has increased in popularity, particularly as Twitter has fallen out of favour with pharma thanks to chaotic leadership and scandal – not a historically popular mix for the notoriously conservative industry. LinkedIn is set to increase in influence even further, according to Daniel Johnson, Head of the GI and Neuroscience Business Unit in Switzerland at Takeda – whose business unit has adopted it as one of the core social media platforms. Johnson advises that doctors are engaging and publishing achievements on their profiles, which suggests significant further potential for LinkedIn:

“Look at the development of LinkedIn over the past few years and at the power that this has now versus what it had, even four years ago. Imagine the additional features that will come with more ubiquitous artificial intelligence, particularly as a Microsoft company. I think there will be an exponential increase in the power it has as a channel, which we need to figure out how we engage with.” (Daniel Johnson, Takeda)

LinkedIn will never be a place to promote products due to compliance, says Johnson, nor will it be the primary way to engage with customers. But it is set to be an effective way to advertise some of the services offered, such as educational activities, events or value-added offerings.

What type of activities are you doing on social media in 2023? (Select all that apply)

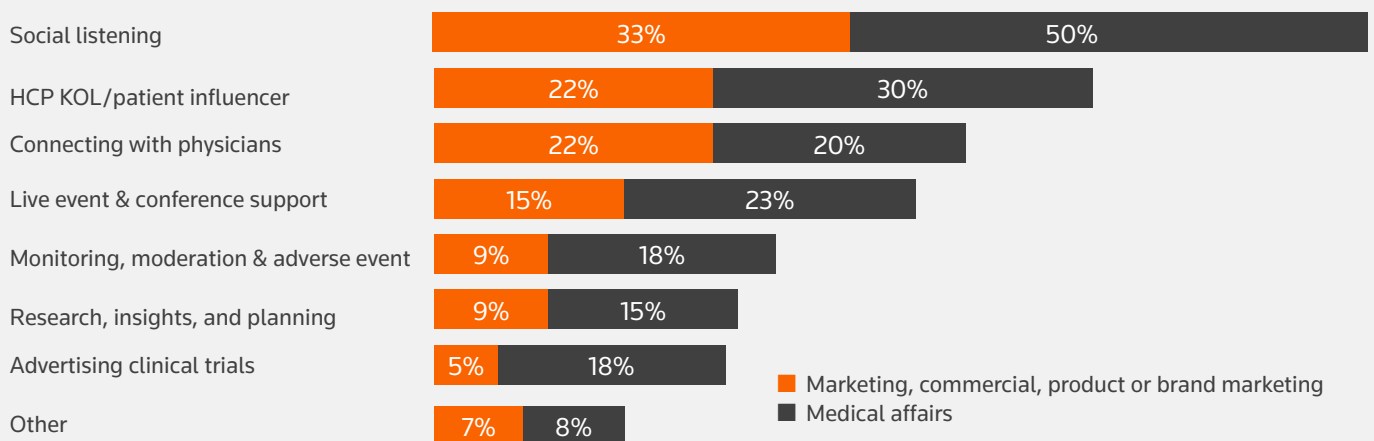


Figure 4. Graph showing current industry social media activities for engaging HCPs, 2023 Reuters Events Pharma survey.

PROMOTIONAL ACTIVITIES

MEETINGS AND EVENTS – BOTH VIRTUAL AND IN-PERSON– WERE RATED BY 99% OF RESPONDENTS AS LIKELY OR VERY LIKELY TO RECEIVE INVESTMENT THIS YEAR.

Reuters Events Pharma 2023 Omnichannel Engagement Survey

We asked survey respondents in marketing, commercial and product or branding about their promotional spending expectations in 2023 and how they expect these to change in the next three to four years.

In-person, sales rep-led activities are currently seeing significant investment with the largest proportion of respondents, 85%, indicating “very likely” investment in 2023 (see Fig 5). However, budget increases will be led by virtual sales-rep-led activities 65% of respondents expecting budgets increases by 2026, as opposed to 46% of respondents that expect increased budgets for in-person sales-rep led activities (see Fig. 6).

Email marketing is seeing significant investment currently, which is set to increase significantly by 2026, in direct contrast with direct print mailers.

Strikingly, meetings and events— both virtual and in-person— were rated by 99% of respondents as likely or very likely to receive investment this year. Looking ahead to 2026, virtual meetings and events are expected to receive increasing investment by 63% of respondents compared with 45% of respondents expecting increased funding of in-person events.

Investment in omnichannel engagement capabilities is expected to increase by the largest number of respondents between now and 2026. Eighty eight percent of respondents indicated that investment in omnichannel capabilities will increase in this time period. Increases to digital advertising and social media advertising budgets are also expected to rise by 86% and 74% of respondents respectively.

Digital advertising is very likely to receive investment according to 69% of respondents with 86% of respondents indicating that budgets will increase significantly by 2026, in direct contrast to print advertising with 14%.

How likely is your company to invest in 2023 in the following promotional marketing channels?

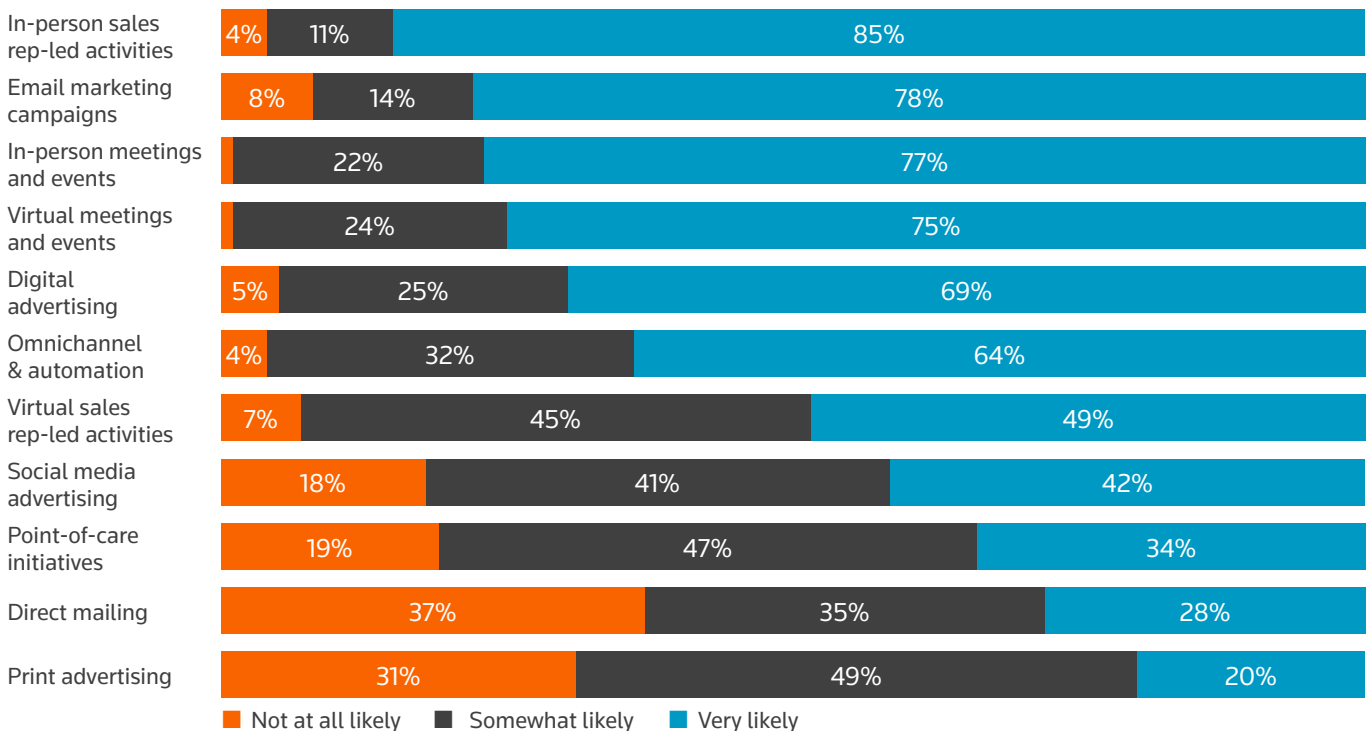


Figure 5. Graph showing promotional activities currently receiving investment, 2023 Reuters Events Pharma survey.

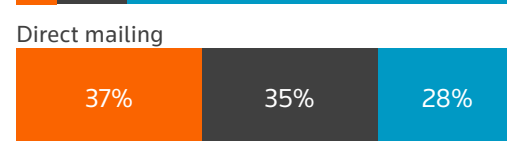
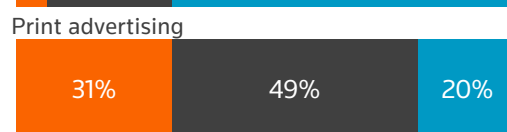
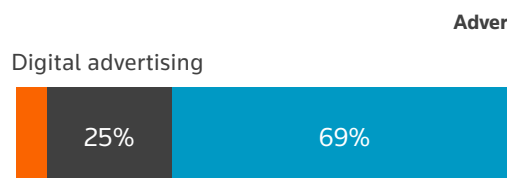
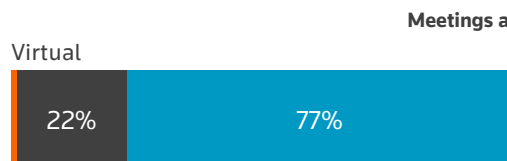
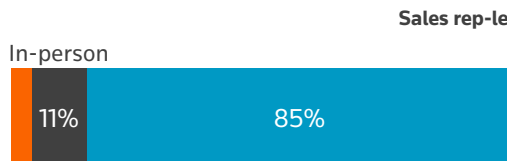
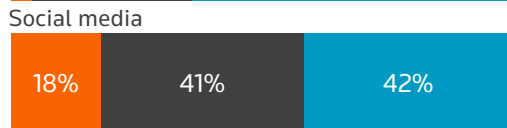
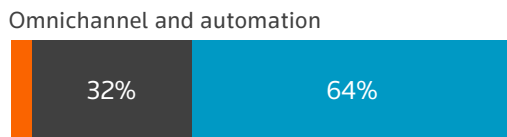
HYBRID CHANNEL MIX IS ADAPTIVE AND EVOLVING

Speaking with industry experts revealed that the ideal channel mix varies greatly by region and therapy area, with new regulations sometimes being implemented locally. Digital channels continue to grow in importance but in-person and face-to-face engagement remain important. Our survey reveals that the way HCPs consume content is undergoing dramatic changes. Roughly 90% of survey respondents across all functions have seen significant change in the channels being used.

“In the US, an appetite amongst HCPs to consume information at a time that most suits them is continuing to drive the pandemic-era trend of increased online communications”, says Power. This has driven an advance in synchronous access to information: “From a pharmaceutical perspective, we really need to embrace and adapt to that change as part of an overall communication strategy”.

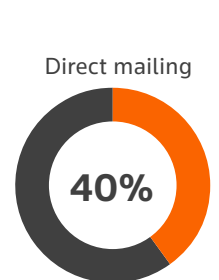
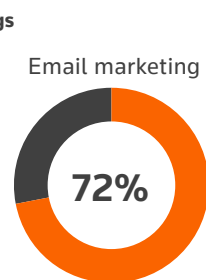
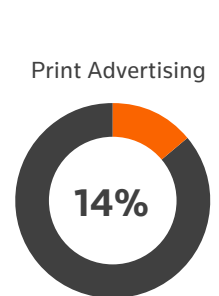
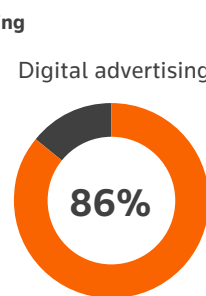
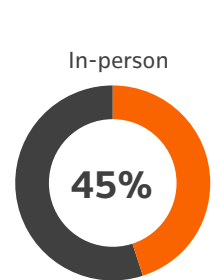
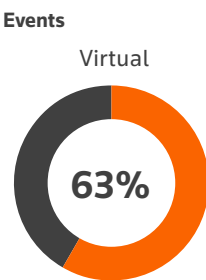
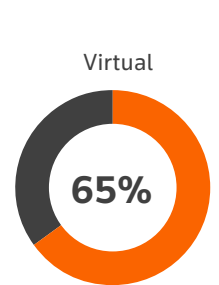
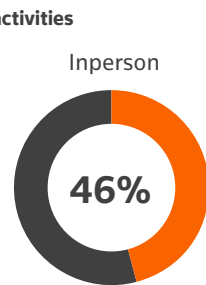
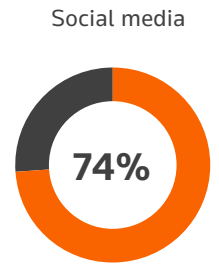
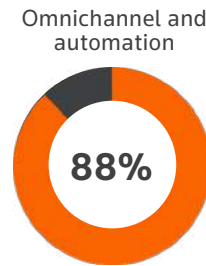
According to Power, digital technologies have enabled HCPs to be better served, resulting in a more diverse range of content formats available to present data and allowing pharma to “become much more aware of stakeholder needs and preferences”. Self-service offerings will not replace the need for a medical science liaison function, says Power, but rather give HCPs more choices and control: “Everybody has a different preference in the way they like to receive information, digital has expanded the offerings”.

How likely is your company to invest in 2023 in the following promotional marketing channels?



■ Not at all likely / not so likely
■ Somewhat likely
■ Very likely / extremely likely

Respondents expecting budget to increase by 2026.



■ Budget increase expected
■ No budget increase expected

Figure 6. Graphs comparing current and future promotional channel investment, 2023 Reuters Events Pharma survey.

In the EMEA region, the hybrid model is maturing, according to Bayer's Tertel: "It's a mixed picture," says Tertel. "The post-COVID period has certainly been characterised by finding a balance between virtual and face-to-face interaction to find the right hybrid engagement model".

Some countries are forced to adopt changes to the HCP engagement model because of rules and regulations, while others are adapting the model to meet a change in physician preferences.

"Many countries and regions are experiencing an uptick in face-to-face engagement", says Tertel, emphasising the variability by market. "Some markets have returned to mainly face-to-face engagement, while others are engaging across a wide range of channels. The challenge is industry-wide, with many organisations working to optimally orchestrate channels".

Taking Portugal as an example, Eduardo de Melo Corvacho, Senior Brand Manager at GSK, reports that the lower levels of investment, convenience and reach of digital engagement tactics remain compelling, yet in-person engagement still has enormous power to influence. Optimising the mix of the two approaches is therefore of central importance.

"The challenge is to understand how to divide the level of investment depending on the return that you're going to get from each [promotional] activity [whether in-person

"IT'S A MIXED PICTURE, THE POST-COVID PERIOD HAS CERTAINLY BEEN CHARACTERISED BY FINDING A BALANCE BETWEEN VIRTUAL AND FACE-TO-FACE INTERACTION TO FIND THE RIGHT HYBRID ENGAGEMENT MODEL."

Daniel Tertel, Head of Commercial Excellence EMEA, Bayer

or digital]", says Melo Corvacho. "One method to optimise investment levels and touchpoints is to spread an activity out across a long period of time [such as by holding an in-person event which can then be extended by being hosted online for asynchronous access]".

This approach allows each channel —both in-person and digital—to be leveraged while reducing the level of investment needed. Rather than preparing an extensive and costly in-person event, for example, a blended customer journey is prepared to give the best of both worlds, with in-person and real-time virtual sessions followed by asynchronous on-demand content shared later. "I have seen and executed many initiatives that followed this principle, with good results", says Melo Corvacho. "In this way, I have been able to reach good levels of participation but also optimised the level of investment needed".



Ask the Experts

Q. What are the most important factors in your decision-making process about promotional activities?

Our survey revealed that when deciding what activities and content to leverage, quality of content, physician needs and availability of metrics to track effectiveness were the three most influential factors for marketing and commercial, selected by 88%, another 88% and 75% of respondents respectively.

Most influential decision-making factors when choosing content and activities

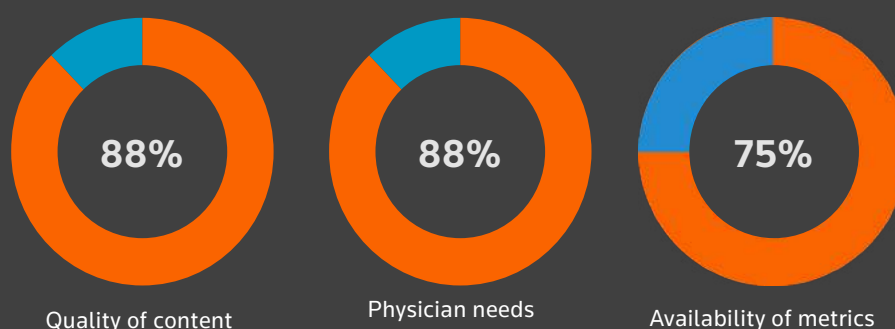


Figure 7. Graph showing decision-making factors for promotional activities, 2023 Reuters Events Pharma survey.

A. "There are so many channels, sometimes the question is choosing where to start. I prioritise channels where I can track and collect data. That's the most important factor because I can see if it works, and reuse the data to make my communications across other channels more effective. Another consideration is the balance between cost and reach. "

Daniel Tertel, Head of Commercial Excellence EMEA, Bayer Pharmaceuticals

A. "I would say physician information needs are critical. And the quality of content as well. The first thing we need to understand as a team is whether there is a need for medical education. For instance, if I work in a therapy area where there is not much happening in terms of new research or new data, there might not be a need. But if I want to launch a new application or I'm going to work within a different medical specialty, I need to ensure that I educate physicians and make them aware of why a particular drug works for a particular disease."

Eduardo de Melo Corvacho, Global Senior Brand Manager, GSK

A. "I would put physicians' needs first. You also need to have good-quality content. The availability of metrics is also important."

Daniel Johnson, Head of the GI and Neuroscience Business Unit in Switzerland, Takeda

Turning to APAC, Manish Narang, Director of Medical Affairs for APAC at Abbott, specialises in the cardiovascular therapy area. Narang told us that digital channels are being used in an agile and adaptive way, whilst in-person activities have returned in full force and are being used to gather in-depth insights. Creative use of a blend between digital channels and in-person activities is the norm, such as the use of WeChat in China, for example, which can be used to enhance reach when collecting insights and then be used as a stimulus for in-person discussions.

“Through WeChat in China, for example, which has a wide reach, we can gather input from thousands of physicians at one time”, says Narang. “But we find that if we bring 10–15 people together in a room, it delivers better insights. We can also look at a WeChat recorded session and gather feedback from that small group”.

According to Narang, WeChat can be used to maximise reach, an important consideration given the sheer magnitude of the country and the varied business interests. “We go through various internal approvals

before we can broadcast our content on WeChat, but it was recognised as an efficient medium of reaching a much wider audience”, says Narang, adding that WeChat has been used successfully for various broadcasts that include videos, images, text and audio. “There were initial reservations about the use of WeChat. But I would say common sense prevailed. And I think we have been really successful with the various programmes that we have broadcasted on the chat.

Content publishers are noticing a dramatic change in tactics being used: “We’re seeing a big trend towards digital ingestion of high-quality content, and we’ve built this into the solutions that we’re offering”, says Elsevier’s Conlon. “Marketers are seeking ways to license publication content digitally to share with wider HCP audiences, whether that is through social media or email distribution”.

“THE CHALLENGE IS TO UNDERSTAND HOW TO DIVIDE THE LEVEL OF INVESTMENT DEPENDING ON THE RETURN THAT YOU’RE GOING TO GET FROM EACH [PROMOTIONAL] ACTIVITY. ONE METHOD TO OPTIMISE INVESTMENT LEVELS AND TOUCHPOINTS IS TO SPREAD AN ACTIVITY OUT ACROSS A LONG PERIOD OF TIME.”

Eduardo de Melo Corvacho, Global Senior Brand Manager, GSK



EDUCATIONAL ACTIVITIES

We asked all survey respondents about their educational activities in 2023 and how they expect these to change in the next three to four years. Results showed a significant growth in investment in continuing medical education (CME) since 2021, and was the most likely educational activity to receive investment now, across all respondent groups with 82% of all respondents indicating investment in 2023 as very likely, an increase of 9% since our 2021 survey.

Patient education materials was selected by the second largest portion of all respondents at 69%, followed by research data and analytics with 67% (up 8% since 2021) and webcasts of scientific events also at 67%, (down 7% from first place in 2021) (see Fig. 8).

Since 2021 expected budget rises in the following three to four years have shown a steep increase. The majority of respondents in 2023 expect budget increases across a number of educational activities, particularly education platforms with increased budgets expected by 72% of respondents, up by 8% compared with 2021 expectations. Additionally, patient education material budgets are expected to rise by 71% of respondents, up by 13% compared with 2021 expectations. Furthermore, CME budgets are expected to rise by 69% of respondents, up 10% since 2021 (see Fig. 9).

How likely are you to invest in 2023 in the following medical educational products?

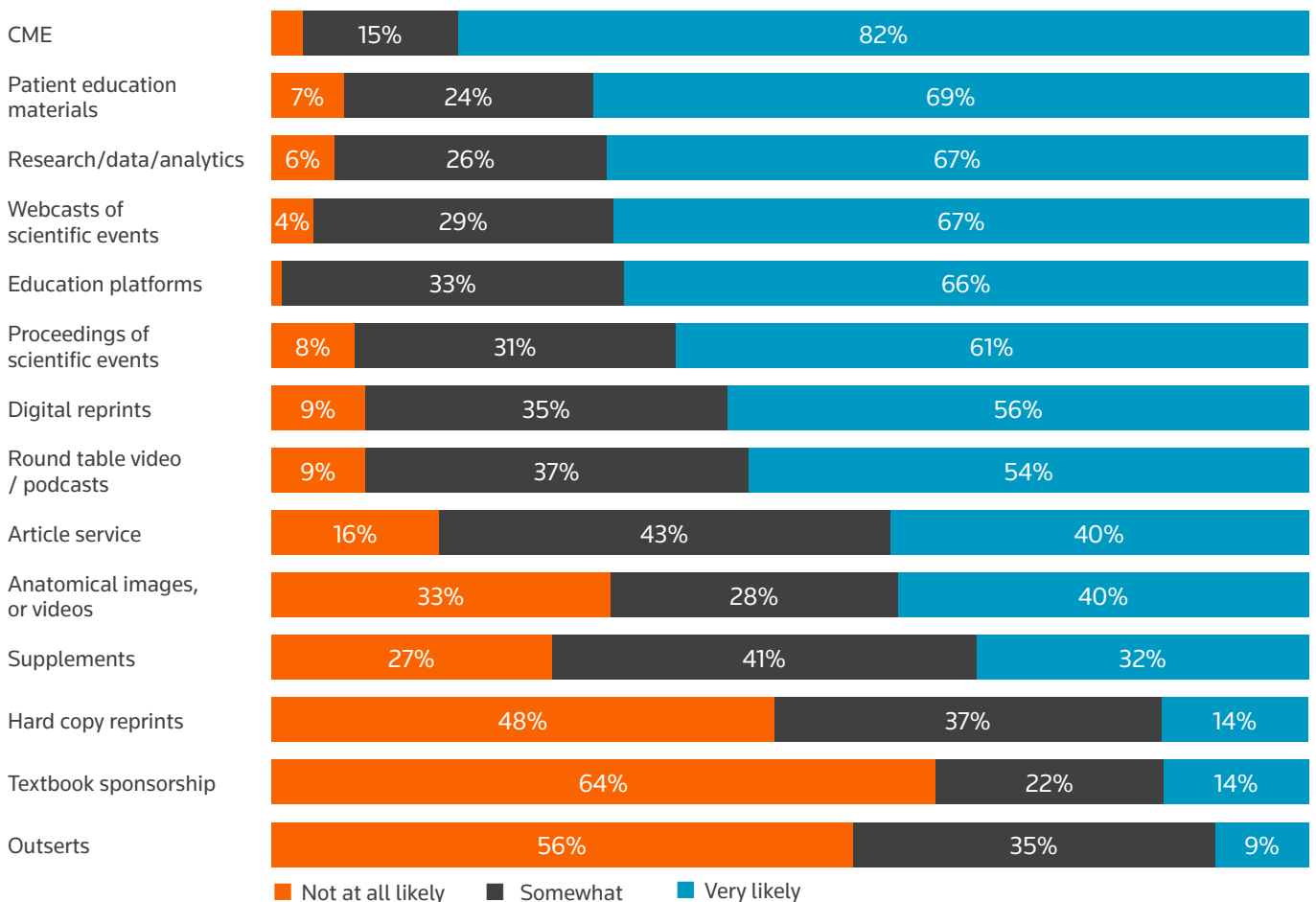
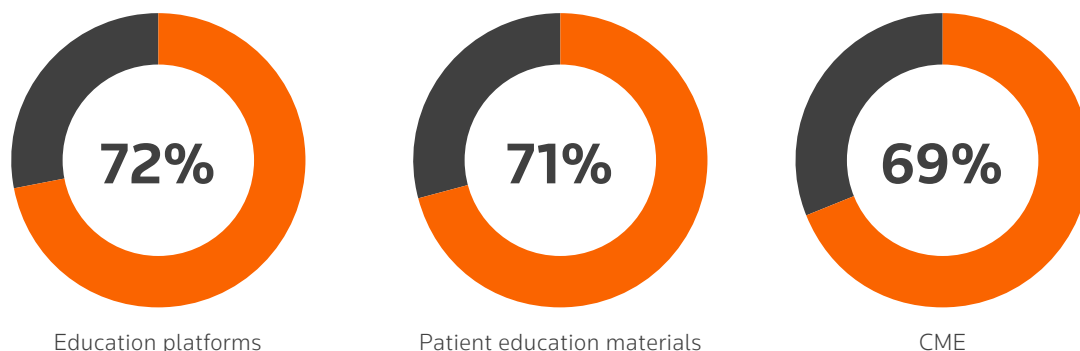


Figure 8. Graph showing current investment in educational activities, 2023 Reuters Events Pharma survey.

Percentage of respondents that expect increased investment by 2026

**Figure 9.** Graphs showing expected changes in educational investment by channel, 2023 Reuters Events Pharma survey.

Survey results and discussions with experts revealed that digital and in-person educational channels are dominating over print materials currently, with the use of print and hardcopy content continuing to decline. Medical affairs teams are diversifying the formats of materials available, thanks in part to shifting content

creation strategies focusing on modular content. The medical affairs function is also experiencing a surge in strategy and planning to produce medical content that can be leveraged through omnichannel engagement infrastructure aligned with medical objectives.

Ask the Experts

Q. What are the most important factors in your decision-making process about educational content and activities?

Our survey revealed that when deciding what educational activities and content to leverage, quality of content, physician information needs and availability of metrics to track effectiveness were the three most influential factors for medical affairs respondents, with 92%, 85% and 82% respectively identifying these factors as very important. Results showed a high level of alignment with how marketing and commercial respondents indicate they select promotional activities.

Medical affairs experts told us:

A. "From the global medical perspective, we prioritise reach and audience size. We invest a lot in creating publications. The other part where we put a lot of investment is global congresses to larger audiences to get the message out".

Sandra Casiano, Global Senior Medical Director, Sanofi

A. "Content is the most important criterion for us in terms of physicians' education. They ask which expert is talking to them, what they are talking about, and what is the relevance of the particular topic with regard to the current protocol. So, content and quality of content is the most important to us, followed then, obviously, by the physician in question and physicians' needs".

Manish Narang, Director of Medical Affairs APAC, Abbott

A. "You're going to be limited by budget. How you allocate that budget informs everything else. You're going to have to prioritise and invest in certain channels more than others. The smaller the company, the tougher those decisions are because you can't do everything at once".

Eddie Power, Principal, emPower Medical LLC

97% OF RESPONDENTS IN MARKETING, COMMERCIAL OR BRANDING AND 87% IN MEDICAL AFFAIRS INDICATED THAT PATIENT EDUCATION MATERIALS ARE RECEIVING INVESTMENT IN 2023.

Reuters Events Pharma 2023 Omnichannel Engagement Survey

Consideration is being given to what channels should be used to engage clinicians with medical and other appropriate content. Sanofi's Casiano tells of increasing demand amongst HCPs for novel formats, such as podcasts and summaries or highlights of a manuscript:

"Clinicians want the right data, now. I think this is very much in line with what is happening in our society. We like things that are fast. If they want to dig deeper into the information, they will. The challenge from our side is to give them the information that they need to be able to use it when they need it, in a fast-paced and bite-sized format".

Marketing and commercial teams are also shifting away from promotional content to educational content and problem-solving. For example, digital health projects, like apps for specific patient populations, can help HCPs treat and educate patients and help pharma collect real-world evidence that supports the development of a drug locally.

"Engaging an HCP in a project which is meaningful to them and will ultimately result in better patient outcomes meets far more of our investment criteria than product promotion and education around our product", says Takeda's Johnson, describing promotional efforts as a continuum, with product promotion on the far left, value-based partnerships for long-term success on the far right and education in the middle. "In this way, your educational activities are feeding into the development cycle and helping make decisions in terms of patient outcomes".

Takeda is investing more in non-promotional or educational events. One format involved HCPs choosing the agenda topics with an accompanying education drive in their local communities, which "helps build a broader education base across the HCP community" and additionally shapes the market, adds Johnson.

CO-CREATING WITH HCPS IS ON THE RISE

Across the industry, particularly for specialised brands or those driven by key accounts, companies are seeking to partner and co-create with customer groups. "Marketing teams that are focused on direct contact with customers are ideally co-creating value solutions with customers", says Bayer's Tertel, highlighting patient education materials as an example.

"Patient education materials are becoming a very relevant method to engage our customers and create value for them. We started that two or three years ago, and we have had quite positive experiences and high engagement levels on that".

Our survey corroborates this viewpoint as an industry-wide trend, with a staggering 93% of all respondents (97% of marketing, commercial and product or branding respondents and 87% of medical affairs respondents) indicating that patient education materials are receiving investment in 2023 (see Fig. 8).

According to Tertel, patient education materials are a way to collect HCP engagement and frequency of use data outside of the regular campaign approach. Physicians report that patients are asking them for innovative education resources, not simply leaflets. "We can enable them to educate their patients through digital means."

Takeda's Johnson has witnessed HCP expectations change. Customers want more from interactions with pharma before being willing to engage:

"THE TYPES OF ENGAGEMENT THAT WE HAVE FOUND PRODUCTIVE ARE MORE VALUE-DRIVEN AND PROJECT-BASED. [HCPS] WANT TO DO SOMETHING MEANINGFUL. THEY'RE LESS LIKELY TO COME IN AND ENGAGE WITH YOU TO LISTEN TO YOU TALK ABOUT YOUR PRODUCTS."

Daniel Johnson, Head of Business Unit for Takeda, Switzerland

WHAT DOES THE FUTURE HOLD?

Many of the trends discussed above are in their infancy and are set to continue as pharma adapts to maturing HCP engagement models and as it becomes increasingly adept at omnichannel engagement, with increased investment expected in the next three to four years.

According to survey respondents and conversations with industry experts digital and in-person activities will continue to dominate engagement, and print will continue to decline, with print budgets expected to shrink from 32% in 2023 to 22% by 2026. “Less reliance on traditional channels and letting go of traditional methods is likely”, says Johnson, “as the hybrid model of engagement becomes clearer and digital channel use increases”.

That said, channel mixes that differ by region and therapy area are likely to continue, depending on the needs of local HCPs. The expectations of survey respondents, that virtual sales-reps and virtual events once more receive favourable funding over in-person sales reps and events may materialize in the future, but evolution is unlikely to be homogenous.

“Collaboration is also likely to continue on an upwards trajectory”, says Power, referencing our survey result showing that over 50% of respondents are already in a highly collaborative or integrated environment; By 2026, I would predict that we are going to see more of the integrated cross-functional team approach and the fully integrated cross-functional group will increase over the next three years”.

Our survey results in 2023 compared with 2021 show that educational budgets are expected to increase more steeply than was previously expected two years ago, particularly education platforms, patient education materials and CME.

Tertel and Johnson predict an increase in patient education activities, particularly innovative digital offerings that help specialists to achieve treatment goals and pharma to collect real-world evidence to support enhanced patient outcomes: “In future, I would expect that every brand that wants to engage with customers, online or digitally, will need to have an offering in this regard”, says Tertel.

Increased investment in social media and particularly leveraging the influence and reach of DOLs is a certainty, according to Elsevier’s Conlon:

“I expect pharma to tap into influential individuals more in the future as they start to see how relevant DOLs are to the online conversation space – not necessarily to sell products but to talk about how they are diagnosing and treating patients.” (Denis Conlon, Elsevier)

The use of physician-level-data is also set to grow with investment in digital channels, particularly for marketing and media aspects of engagement, according to Johnson. A trend that Conlon has already witnessed, with increased demand for PLD whereby HCP engagement tactics can be directly linked to changes in prescribing behaviour, which is of particular interest to the commercial function. Whether or not medical affairs teams could potentially leverage PLD—and to what extent—to measure the impact of scientific and medical content on HCP treatment practices needs careful consideration.

One thing is sure, the HCP engagement landscape continues to evolve rapidly, and it is vital that pharmaceutical organisations stay abreast of the consumption preferences of HCPs in an increasingly competitive environment.

“WE ARE GOING TO SEE MORE OF THE INTEGRATED CROSS-FUNCTIONAL TEAM APPROACH...OVER THE NEXT THREE YEARS.”

Eddie Power, Principal, emPower Medical LLC



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- **Manish Narang**, Director of Medical Affairs APAC, Abbott
- **Sandra Casiano**, Global Senior Medical Director, Sanofi

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