HCP ENGAGEMENT REPORT: HOW TO MAXIMIZE MARKETING ROI

Digital technology is changing healthcare fast, opening a new, digital world for pharma marketers to influence and inform HCPs who are getting more and more challenging to reach in-person. Yet, marketers still need to build relationships and trust that face-to-face meetings with HCPs traditionally provide.

Read this report to understand how marketers are evolving HCP engagement to keep pace with the industry’s digital transformation, and which HCP touchpoints and channels are yielding the best results.

Pharma may be lagging other industries in terms of digital maturity but the writing on the wall or perhaps in the smartphone isn’t lost on the drug industry, going by the details in a new survey by the healthcare solutions provider, Indegene.

The survey suggests that by 2018, 19% of the pharma industry’s marketing budgets will be spent on non-personal digital channels, up from an average of 14.85% in 2016.

The Indegene study, which draws insights from over 100 pharma marketers at the top 40 life science firms across the US, Europe, Asia Pacific (APAC) and China representing commercialization functions, notes that China and the US are ahead of the curve in non-personal digital spend with 33% and 31% of pharma marketers respectively spending over 20% annually.

This compares with 17% of marketers in the APAC region and 30% in Europe who spend more than 20% in non-personal digital channels; 50% of the marketers in the APAC region spend less than 10% in the non-personal digital space, the survey notes.

China’s strong digital preference isn’t really a big surprise – past studies have indicated that more than 50% of Chinese healthcare professionals (HCPs) accept digital channels to receive information and 53% wanted rep visit frequency to reduce. A study by Indegene in 2014 revealed that physicians - mainly specialists such as pulmonologists, cardiologists and gastroenterologists - preferred rep visit frequency to be only once in one-two months. This is primarily on account of the overcrowded out-patient departments and stricter regulations concerning HCPs meeting with reps in the wake of the pharma corruption scandals in China.
Interestingly, the current Indegene study predicts that by 2018 global pharma marketers will spend 19% of their marketing budgets on non-personal digital channels – the percentage of marketers in China and the USA who spend more than 20%, though, stays constant at the 2016 levels but the spending base is higher.

**DIGITAL BUDGET**

The survey also revealed that currently for every $100 spent on the digital budget by the global pharma marketer, $17 is spent on brand promotional emails and KOL webinars each and $15 on HCP portals among others; short message service (SMS) texts got the least budgetary spend.

Digital spending in India is also believed to be on the up and frontline firms say that multi-channel communication has seen an encouraging response from HCPs.

GlaxoSmithKline PLC’s CEO Andrew Witty recently noted how one in three doctors in the country had signed up voluntarily to engage with the company in multi-channel communication.

“Instead of the whole relationship being built around too many conversations in the busiest part of the HCP’s day when the rep wants to see the doctor, now if the doctor wants to talk to us we can be there to help,” Witty told Scrip in a recent interaction. The GSK boss also outlined how GSK’s new HCP-engagement model, unveiled at the end of 2013, had facilitated strong revenue gains and had received very encouraging feedback from both the firm’s sales teams and physicians in general.

Interestingly, the gains of adopting digital strategies appear to go beyond just patients and physicians. McKinsey & Company research is reported to have found that companies with advanced digital capabilities grow revenues twice as fast as peers and deliver 25% greater total returns to shareholders annually.
Brian Fox, McKinsey & Company’s global leader of the marketing and sales group within its pharmaceuticals and medical products practice, recently underscored that drug firms will need to make a vital shift in their orientation towards patients and physicians to keep pace with other industries well ahead in the digital arena. At the same time, there are fundamental changes in how patient and physicians behave – how they access information and make decisions, as well as how they connect and interact with one another.

In a recent interaction, Fox told Scrip:

“REGARDLESS OF WHETHER A COMPANY HAS DECIDED TO MAKE A DEEPER COMMITMENT TO DIGITAL CHANNELS, TOOLS AND TECHNOLOGIES, EVERY COMPANY SHOULD BE INVESTING IN UNDERSTANDING THEIR PATIENTS AND PHYSICIANS.”

Brian Fox
McKinsey & Company

KOL WEBINARS

The latest Indegene study also notes that by 2018, KOL webinars, social media, and mobile apps would likely become the most preferred channels of engagement with HCPs.

Gaurav Kapoor, executive vice president (sales and marketing), Indegene, notes that increased worldwide usage of smartphones and mobile devices has opened up the possibilities of mobile social networks.

Kapoor told Scrip that some of Indegene’s digital content is consumed by over 50% people on smartphones in the US, India and China. For example, in the case of Abbott’s Knowledge Genie, 55% of traffic comes from smartphones and mobile devices. Knowledge Genie essentially brings the latest insights and key developments in medical education to physicians and the medical community.

Importantly, brand promotional emails as a preferred channel is expected to stay stagnant, though still a sizeable chunk at 63%.

KOL webinars as a preferred channel is seen going up to 69% in 2018 from 62% in 2016, with mobile apps set to increase 30.1% as a preferred channel. In Europe, mobile apps, which have a relatively low score in 2016, are expected to grow by a notable 131.2% by 2018.

Striking growth is also anticipated in Europe’s preference for KOL webinars to engage HCPs - in 2018 it is seen at 71% (2016: 34%). For the APAC region this preference is seen at 77% in 2018 (2016: 70%), while in the US it is expected to reach 62% in 2018 (2016: 57%); in the case of China, preference for KOL webinars is expected to go up by 10.9% in 2018.

Past studies have noted a high adoption of KOL webinars in Rest of Asia territories - India, Malaysia and Indonesia and in Australia, followed by the Middle East and Turkey regions.

Higher Returns

Significantly, KOL webinars, brand promotional emails and online/self-detailing are the top three channels that create the highest ROI according to the pharma marketers covered in the Indegene survey. Self-detailers are generally pre-made smart presentations that can be initiated by the HCP by clicking a link in an e-mail whenever he/she so chooses.

Indegene said that KOL webinars were identified as the most ROI-generating channel. Marketers typically follow simple calculation methods of
cost per engagement minute to evaluate the ROI for specific channels, the firm explained. The ROI metrics can be further enhanced by calculating the Rx increase in the digital-engaged HCPs vs control groups.

**TURN KOL WEBINARS ALWAYS ON**

In addition to making more efficient use of HCPs’ time, KOL webinars also save pharma marketers time and resources. That’s why a rising number of pharma marketers are creating a library of on-demand KOL webinar content for doctors to access at their convenience and leverage as an ongoing knowledge resource.

With KOL webinars now at the fingertips of HCPs, viewership increases by an average of 40%, according to the 2018 ON24 Webinar Benchmarks Report. This means that the ROI of a typical KOL webinar nearly doubles, without factoring in the savings on internal marketing resources.

Through the ON24 Platform, both live and on-demand webinars can be set up to deliver traditional informational discussions, but also include other elements like key opinion leader question-and-answer sessions, explainer videos, and access to resources like PowerPoint presentations and detail aids. The more effective and compelling the content, the better the engagement and brand awareness for the marketer.

On the back end, marketers can use data and analytics to gauge individual level of engagement during and after a webinar, and provide that information to their clients for additional sales and marketing uses.
**ON24 CUSTOMER STORY**

**LEADING LIFE SCIENCES COMPANY USES ON24 WEBINARS TO IMPROVE PATIENT OUTCOMES WORLDWIDE**

This leading life science company needed to find a way to bridge the gap in communication between its expert researchers and those in the field daily—in their case, the healthcare professional. It needed to engage with healthcare providers in order to spread important diagnosis and treatment information and ultimately improve patient care.

They found that webinars were an optimal way to communicate best practices to providers around the world and keep them up to date with the latest information as quickly as possible to save more lives. So, it turned to ON24 to execute the task.

**RESULTS**

- Conversion of live webinar registrants to attendees: 70%
- Increase in engagement of viewers: 48%
- Of HCPs plan to change their routine practice based on what they learn in ON24 webinars: 76%+

**PROBLEM**

As the life sciences company expanded its live events and trainings into the online world of webinars, its number one concern was reaching healthcare professionals in many different regions around the world. They were spending a lot of time and money traveling to different countries to help providers with countless projects. This created a less efficient exchange of information and delays in training. This time spent also cut into diagnosis and treatment time, ultimately wasting precious time for patients with little to spare. And as more and more research surfaced, they needed to be able to scale and educate hundreds of doctors around the world.

Secondarily, they needed to ensure that the communication gap between researchers and healthcare providers was bridged. When it came to education around cancer and patient treatment, they didn’t want any moment wasted. In the end, it needed to know which healthcare professionals attending its webinars and events were actually engaged and showing interest in making a change to the way they ran their practices—to make sure that the information it provided was having an impact on attendees.
**Solution**

With ON24, they found a platform that helps them host information exchanges, trainings and facilitates open discussion between experts and in-the-field healthcare professionals from anywhere in the world. ON24 is their new tool for guiding the message of patient care and presenting very scientific information in an engaging and interactive way.

They particularly use the ON24 Engagement Score to monitor this engagement and determine how well webinar attendees respond to polls, surveys, interactivity with tools and track if true interest in improving patient care exists. ON24 shows them what type of content is working or not working and they adjust its strategy for each new live event in order to boost engagement.

Surveys within the ON24 Platform also help them gauge whether or not a specific message resonates and actually creates a desire for change in how a healthcare professional wants to conduct their practice and patient care.

**Results**

The life sciences company measures success on the goal of bridging the gap between the experts and the healthcare professionals who deal with the patient daily. In addition to increased webinar attendance and engagement over its five 2018 events, they see more than 76% percent of healthcare providers commit to making a change in their routine practice based on what they learn in ON24 webinars. With the communication gap successfully bridged through ON24, better treatments and quicker diagnosis for cancer patients worldwide is well on its way.

**About the ON24 Platform**

The ON24® Platform empowers pharma marketers to create interactive webinars and content experiences that engage HCPs at scale and give insights into every interaction. Through live, always-on and personalized digital experiences, ON24 provides a powerful solution for pharma marketers to innovate HCP engagement and impact their bottom line.

"ON24 gives us access to multiple countries at the same time and helps us determine where to invest our time, research and training tools in order to efficiently bring about the most change in how healthcare professionals diagnose and treat patients."

Leading Life Sciences Company