

The Future of Pharma is Data-Centric

Independent Survey Finds New Opportunities to Better Engage HCPs and Patients



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INTRODUCTION

Tealium surveyed 405 healthcare practitioners, both doctors and nurses who are involved in making pharmaceutical recommendations, to learn more about how they perceive the value of their relationship with pharma reps, the quality of information they receive from pharma companies, and how recommendations from patients influence their actions.

Pharmaceutical companies spent nearly \$7 billion marketing directly to consumers in 2021, up more than 70% from 2012. There's a good reason for that: The tactic works. Informed patients, or "The Activated Patient," who request pharmaceuticals by name impact the choices physicians make.

However, healthcare professionals (HCPs) express that pharmaceutical marketing could benefit from more informational relevance to patients and better targeting. In a shift from historical resistance to DTC marketing, HCPs expressed positive sentiments though indicated areas for improvement for pharma brands. Some believe that direct-to-consumer (DTC) marketing can

mislead patients or oversimplify complex diagnoses, highlighting the need for pharma companies to better use contextual data to inform engagement strategies that focus on educating patients in more depth. Given the importance of the HCP audience to pharmaceutical companies, this is a critical issue to address.

Simultaneously, pharma brands also have significant opportunities to improve HCP engagement through empowering the pharma sales "Rep as Orchestrator" role. This is another key evolution in the delicate relationship between healthcare providers and pharmaceutical companies. HCPs rely on pharma companies for information that

helps in diagnosis and treatment. Giving the sales reps, or those with boots on the ground with HCPs, the power to activate which information is provided and through which channels through the "Rep as Orchestrator" dynamic will help to strengthen the relationships. The findings in this report highlight how pharmaceutical companies can best address this challenge by strategically harnessing the power of data to better connect HCP journeys between online and offline channels while improving targeting and messaging in accordance with HCP preferences.



Pharmaceutical Brands Influence HCP Decisions Through Targeted Information

HCP respondents gave pharma companies generally good reviews on their success at delivering information that helps healthcare professionals do their job. In most cases, the information is seen as relevant and easy to find. ***Critical factors influencing clinicians' decisions about which medications to prescribe include the reputation of the pharma company, proven results in field tests, and peer recommendations.*** Reputable medical journals and media outlets are also considered to be important sources of information.

Given the broad set of information about pharmaceuticals that HCPs expect, it is critical for pharma companies to understand individual HCP preferences and automate engagement in the context of those preferences. Pharmaceutical companies have an opportunity to create a variety of materials and incorporate them effectively into website educational materials, personalized web experiences, online/offline customer journeys, and multichannel campaigns. Accomplishing this effectively requires a connected ecosystem.

Preferred Information Sources for New Pharmaceuticals in Order of Priority

01

Proof of Clinical Effectiveness

03

Industry Journals

02

Expert Recommendations

04

Website Content

**Pamphlets and Direct Mail hold the least value*



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Only 27% of clinicians said information is delivered often and easily while another 61% said they often have to seek out the information but know where to look, highlighting an area for improvement. Less than 13% said it is difficult to find information on pharma products.

While HCPs are able to find the information they need, there is a clear opportunity to provide proactive experiences delivering the information that HCPs want without the effort to seek it out. To deliver these proactive experiences, pharma companies need to recognize and understand HCPs in a variety of contexts, which requires connected and unified data.

73% of HCPs need better, easier access to informational materials on pharmaceuticals.



While older generations find digital engagement with pharma brands helpful, it's especially important for **younger HCPs**. A strong pharmaceutical marketing strategy will specifically target this subset of HCPs with proper messaging and on the right channels. *(See pg 8 for preferred channels.)*



Registered nurses (RNs) preferred to research decisions on websites more than other categories of medical professionals by a better than two-to-one margin.



Marketing Campaigns Are Proven Successful, Should Focus on Clinical Effectiveness and Brand Reputation

Healthcare professionals are generally open to prescribing new pharma brands, even if they are already familiar with other brands that treat the same medical conditions. The leading driver in pharmaceutical preference is, once again, evidence of effectiveness. Pharma companies have little control over competitor pricing or peer recommendations, so it's critical to ensure their brands are well-known amongst HCPs and patients, especially when it comes to medical effectiveness. To maximize marketing spend, pharma messaging should be targeted at specific audiences with interconnected, cross-channel messaging.

Influencing Factors in Pharmaceutical Selection for Prescription

- 01 Better and Proven Results
- 02 Increase in Price of Alternative Pharmaceutical
- 03 Recommendation of a Respected Peer
- 04 (Distant Fourth) Patient Insistence on Medication



Effective Marketing Campaigns Emphasize Clinical Results

28% of respondents listed media coverage of clinical effectiveness as the most effective marketing campaign, followed by 22% listing well-designed digital ads tied to informational resources.

Similarly, when practitioners choose to **prescribe a new pharma brand over a comparable one** with which they were already familiar, **61% said it was because that brand had provided evidence of better, proven results.** The opportunity here is not to find new ways to prove clinical effectiveness, but rather to create better campaigns showcasing pharmaceutical results in a targeted and compelling, cross-channel approach.

Top Performing Marketing Campaigns



Media Coverage of Clinical Effectiveness



Well-designed Digital Ads Tied to Informational Resources



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The most highly ranked channels for receiving information about pharma brands are reputable medical publications and endemic websites such as Medscape. Integrating with these third parties can offer a significant opportunity for pharmaceutical companies, allowing them to pull insights from these websites that will help define audiences and, thus, create better ways to engage with them. Regular journal readers are also more likely than others to prescribe a new brand because of better-proven results.

Highlighting the power of educational emails, among those who rely on email for education 82% say they're fully or very prepared to answer questions about pharma brands, well above the 65% of journal readers who said the same.

Preferred Channels for Receiving Information From Pharmaceutical Companies

- | | |
|-----------------------------------|--|
| 01 Reputable Medical Journals | 04 Sales Reps |
| 02 Endemic Websites like Medscape | 05 Social Media (LinkedIn, Doximity, etc.) |
| 03 Company Website | 06 TV Advertisements |



Twice as many **nurse practitioners** – and nearly three times as many **RNs** – as doctors say interactive virtual experiences were the most effective pharma marketing campaigns they have encountered.



Data Validates Sales ‘Rep as Orchestrator’ Approach to Engaging HCPs

Overall, practitioners value their relationship with pharma sales reps, with 85% finding the relationship with their pharma rep to be valuable, and 27% calling it the most important factor in prescribing. Of this 27%, an **overwhelming 94% said they find the information provided by reps very or moderately valuable**, well ahead of any other group.

Most clinicians meet with their sales reps at least quarterly. Those who

meet more often tend to place a higher value on the quality of information they receive. Nearly 65% of all clinicians interact with their pharma sales reps at least once a quarter and 20% do so weekly. Nearly half of all respondents interact with their pharma sales reps at least once a month and only 12% said they have no interaction at all. Of the 27% who most value the sales rep relationship, 72% of them meet with their reps on a weekly basis.

Value of the Sales Rep Relationship



Find the Relationship to be Valuable



Consider the Relationship to Be the Most Important Factor in Prescribing

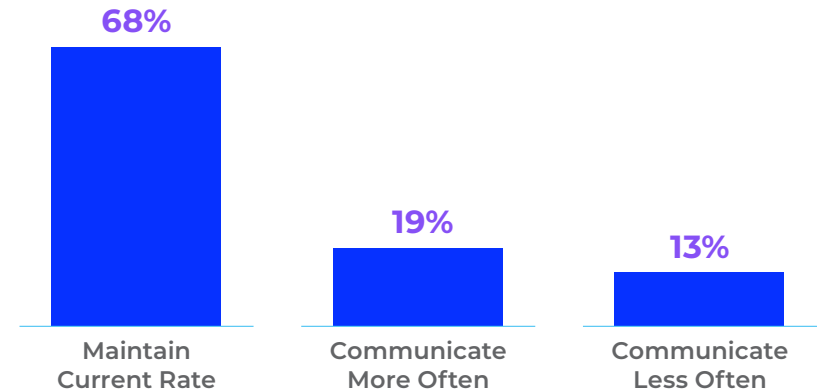
Of the 27%, **94% Find Information Provided by Reps to be Valuable**



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At these frequencies, pharma companies can turn to digital channels to sustain engagement between sales rep interactions, especially when they empower the “rep as orchestrator” dynamic with marketing. This orchestration helps to better utilize non-personal promotions (NPPs) alongside personalized efforts where appropriate. Sales reps can also, in turn, be more effective with the intelligence that digital engagement can provide, assuming the pharma company has the infrastructure to integrate these various data points and events and make them accessible to the sales rep. This can be achieved with a system like a Customer Data Platform (CDP).

Satisfaction With Sales Rep Communication Frequency



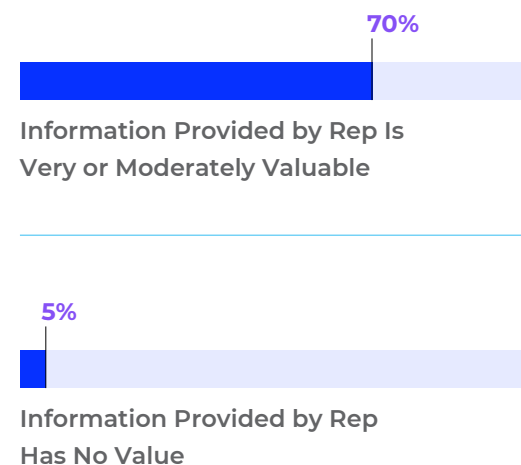
70% of respondents say the information their rep provides is very or moderately valuable.

Just 5% found no value. Of those who rely on a sales rep as the preferred information channel, 85% meet with the rep at least once a month. That's nearly double the rate of all other respondents.

Add it all up, and pharma brands have a significant incentive to embrace the “rep as orchestrator” engagement strategy with their HCPs. The Customer Data Platform offers significant support in this area, enabling the connection of offline HCP experience via sales reps with online HCP experience through digital channels and allowing reps to activate automated campaigns and outreach.

Digital channels, when executed in accordance with HCP preferences and in the context of the HCP relationship, can sustain HCP engagement in between offline meetings while simultaneously providing sales reps with critical insights in HCP interests and behavior.

Value Found in Information From Sales Reps



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Also, HCPs who are more invested in their relationships with pharma reps prefer to communicate via email, social media, and endemic websites. This information can help pharmaceutical companies create targeted campaigns on these more trackable channels, which will in turn produce more data, improved insights, and an evolution of strategy over time leading to better results.

Additionally, nearly one-third of RNs said the pharma rep relationship is either the most important factor or very critical in their selection of brands to prescribe to patients. That compares to 20% for physicians and 19% for physician assistants.



RNs rely particularly heavily on sales reps, with 77% of them saying they find the information reps provide to be moderately or very valuable compared to 67% of physicians.



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Additionally, nearly 80% of practitioners at smaller organizations described the relationship with their sales rep as the critical or most important factor in making prescription decisions compared to 63% of those at the largest firms.

In summary, there is a strong opportunity to streamline and automate engagement between HCPs, sales reps, and digital channels through a connected ecosystem that will not only make this critical relationship easier to maintain, but also more intelligent.



Clinicians between 25 and 34

years of age are more likely to say they find information from a sales rep valuable than older clinicians by a 57%-to-45% margin.



Clinicians at smaller organizations

are significantly more inclined to look first for information from their rep than the largest healthcare organizations by a better than two-to-one margin.



HCPs Welcome the “Activated Patient” in an Ongoing Shift Over the Last Decade

Connected and self-informed patients, also known as “The Activated Patient,” are playing an increasingly important role in their own healthcare decisions. The survey sought to determine how this factor is influencing medical care.

For the most part, patient questions about medications are welcomed. Most clinicians welcome discussions with informed patients and believe that those who have tried to better understand their condition are more likely to accept and

adhere to prescribed therapies. As opposed to seeing it as an obstacle to overcome, HCPs increasingly view this as a beneficial head start for care.

This is a far cry from the days when HCPs decried “Dr. Google” as an impediment. Most professionals also believe they are well-equipped to answer patient questions. So the informational campaigns that pharma companies are running to both HCPs and patients are working, but there is room for improvement.

A substantial 57% of practitioners said conversations with informed patients help them uncover more information about patient needs



Conversation With Informed Patients Are neither a Help nor a Hindrance



Patient Discussions Make Needs Determination More Challenging

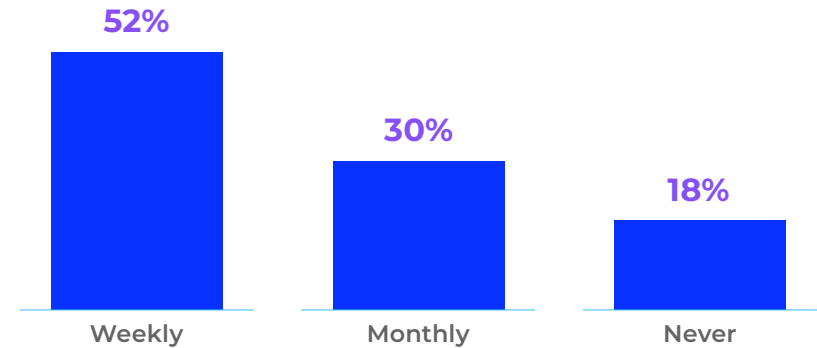


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Those who frown on the practice of marketing directly to patients worry that it could cause patients to misdiagnose themselves or place less trust in the advice they receive from medical professionals.

The opportunity lies in centering marketing campaigns around continued education on pharmaceuticals. Multi-tiered, cross-channel campaigns that can be automated to both HCPs and patients could effectively layer information and increase overall understanding, as well as securing more trust and buy-in. Pharma companies could consider providing patients with ways to talk to their HCPs about the medications, becoming a central part of this critical conversation. There is also an opportunity for sales reps to provide educational pharma materials for HCPs to offer on their websites and directly to patients as a way to enter the conversation between HCPs and the activated patient.

Frequency that HCPs Receive Questions From Patients About Pharma Brands



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Doctors and nurses, especially younger ones, are okay with patients asking questions about pharmaceuticals directly, but they don't believe patients have a full understanding of the medications. Pharma companies need to enhance patient understanding.

Only 21% of HCPs believe patients have a moderate or strong understanding of advertised pharmaceuticals. And 48% of HCPs said patient understanding is limited enough to require a doctor's clarification usually or always.

There's big potential for pharma marketing, but pharma companies need to continue to improve their advertising and messaging campaigns. Having better data that can then be organized and activated will help significantly.



Two-thirds of respondents in the **25- to 34-year-old** age bracket said they have no issues with patients asking questions about pharmaceuticals directly, compared to less than 40% of practitioners aged 45 and older.



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Of those who see value in direct-to-patient marketing, over half said increased patient knowledge of medications helps with diagnosis and **70% said patient knowledge of medications increases treatment adherence**. This means that with better digital engagement, patient outcomes improve. And better patient outcomes benefit HCPs and pharmaceutical companies. A significant 56% also said knowledgeable patients reduce the amount of time they need to spend explaining treatments and side effects. That number falls to 51% among physician assistants and 49% among nurse practitioners.

Among HCPs who don't like direct-to-patient marketing, the number one objection by far is the worry that patients will misdiagnose themselves, a reservation cited by 93% of respondents. A significantly larger percentage of doctors than nurses say another risk is that patients will put less trust in doctor recommendations.



Among those who believe it's valuable for pharma companies to market products directly to patients, **93% of clinicians at the smallest firms** said previous knowledge of medications before being prescribed improves treatment adherence among patients.



Virtual Care Goes Mainstream but Its Growth Is Just Beginning

The use of virtual care grew by 6,000% in the year following the onset of the COVID-19 pandemic and the survey results attest to the technology's wide adoption. Over three-quarters of respondents said they currently utilize virtual care, with physicians being the most active users.

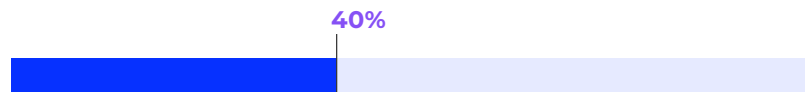
The attitudes of telemedicine practitioners and nonpractitioners yielded some of the strongest

differences of opinions. Active telehealth users were more likely to be open to discussing pharma brands that patients have seen on TV, as well as giving patients more credit for understanding the medications. But while the amount of practices utilizing telehealth on some level is high, the percentage of their patients being treated through telehealth is still relatively low.

Percentage of Patients Being Seen Via Virtual Care



See Less Than 25% of Patients via Telehealth



See Less Than 10% of Patients via Telehealth



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Virtual care users are also more likely to get information from sales reps and somewhat more likely to want to hear from their reps more often. Pharmaceutical companies can identify the HCPs their reps engage with the most and see if telehealth is a primary part of their patient care, which could lead to greater openness to DTC marketing and a tightening of the relationship between HCP and reps.



HCPs aged 25-45 said they are writing more prescriptions as a result of virtual visits and are also more willing to prescribe medications via telemedicine than older respondents. Pharma companies can target this audience directly on digital to increase their Return on Ad Spend (ROAS), cut costs spent on older audiences, and result in more prescriptions being written - aka revenue. Given this younger cohort will only grow as a percentage of pharmaceutical sales over time, it's especially important to address these trends in the near term.



There is a direct correlation to telehealth usage and openness to direct-to-consumer marketing. Pharmaceutical companies can utilize a CDP to identify the telehealth audience for higher-performing campaigns and outreach. Since this is such a niche audience - **HCPs actively engaging in Telehealth**- it provides a great window of opportunity for those who can tap into it.



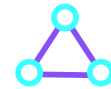
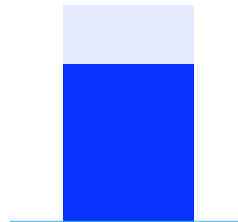
Pharmaceutical Brands Influence HCP Decisions Through Targeted Information



Stat:

73% of HCPs need better, easier access to informational materials on pharmaceuticals.

73%



Implication:

To deliver these proactive experiences, pharma companies need to recognize and understand HCPs in a variety of contexts, which requires connected and unified data.



Insight:

While HCPs are able to find the information they need, there is a clear opportunity to provide proactive experiences delivering the information that HCPs want without the effort to seek it out.



How CDPs Can Help:

Utilize a CDP to understand individual HCP preferences by building customer profiles that include rich behavioral insights. Then orchestrate informational content based on individual preferences by incorporating them into website educational materials, personalized web experiences, online/offline customer journeys, and automated multichannel campaigns.

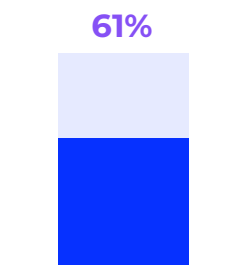


Marketing Campaigns Are Proven Successful, Should Focus on Clinical Effectiveness and Brand Reputation



Stat:

61% of HCPs said they chose to prescribe a new pharma brand when that brand had provided evidence of better, proven results.



Implication:

The opportunity here is not to find new ways to prove clinical effectiveness, but rather to create better campaigns showcasing pharmaceutical results in a targeted and compelling, cross-channel approach.



Insight:

Pharma companies have little control over competitor pricing or peer recommendations, so it's critical to ensure their brands are well-known amongst HCPs and patients, especially when it comes to medical effectiveness.



How CDPs Can Help:

Use a CDP to integrate insights from endemic websites and reputable medical publications that will help define audiences and, thus, create better ways to engage with them.



Data Validates Sales ‘Rep as Orchestrator’ Approach to Engaging HCPs



Stat:

85% of HCPs find the relationship with their pharma rep to be valuable, and 27% call it the most important factor in prescribing medications.

85%



Implication:

This orchestration helps to better utilize non-personal promotions (NPPs) alongside personalized efforts where appropriate. Sales reps can also, in turn, be more effective with the intelligence that digital engagement can provide and stay in communication with HCPs more easily between scheduled meetings.



Insight:

Pharma brands have a significant incentive to embrace the “rep as orchestrator” engagement strategy with their HCPs.



How CDPs Can Help:

Use a CDP to enable the connection of offline HCP experience via sales reps with online HCP experience through digital channels and allow reps to activate automated HCP campaigns and outreach.

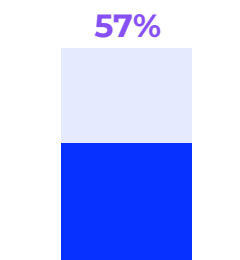


HCPs Welcome the “Activated Patient” in an Ongoing Shift Over the Last Decade



Stat:

57% of practitioners said conversations with patients about pharma brands help them uncover more information about patient needs.



Implication:

The opportunity lies in centering marketing campaigns around continued education on pharmaceuticals.



Insight:

This is a far cry from the days when HCPs decried “Dr. Google” as an impediment. As opposed to seeing it as an obstacle to overcome, HCPs increasingly view the informed - or “activated” - patient as a beneficial head start for care.



How CDPs Can Help:

Create multi-tiered, cross-channel campaigns that can be automated through a CDP to both patients and HCPs that could effectively deliver information and increase overall understanding, as well as secure more trust and buy-in.

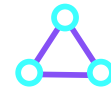
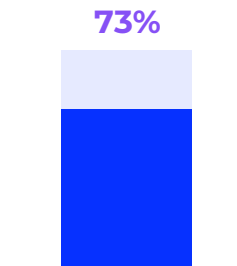


Virtual Care Goes Mainstream but Its Growth Is Just Beginning



Stat:

73% of HCPs who use virtual care see less than 25% of their patients through online platforms.



Implication:

Since this is such a niche audience - HCPs actively engaging in Telehealth- it provides a great window of opportunity for pharma brands who can tap into it.



Insight:

While the amount of practices utilizing telehealth on some level is high, the percentage of their patients being treated through telehealth is still relatively low. But there is a direct correlation between telehealth usage and openness to direct-to-consumer marketing.



How CDPs Can Help:

Pharmaceutical companies can utilize a CDP to identify the telehealth audience for higher-performing campaigns and outreach.



Methodology

- 41% of respondents were physicians, 20% were physician assistants and 25% were nurse practitioners. Just under 12% were registered nurses.
- A majority 57% are in primary care fields followed by 26% and specialty care and 9% in urgent care.
- The respondent base skewed slightly toward larger companies, with nearly 55% coming from organizations with more than 200 employees and 31% from firms with more than 1,000 employees.
- All respondents influence which medications are prescribed to patients.



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