



The Digitally-Savvy HCP

Learnings to Engage HCPs Around the World More Effectively and Efficiently

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Healthcare

HCPs Are More Digitally Savvy Now Than Ever

It is not surprising that Healthcare Professionals (HCP)s today are more digitally savvy than ever. The wave of consumerism led by digital natives has impacted HCPs too when it comes to engaging with content on various digital channels for personal consumption. However, such engagement is seldom translated into their professional lives when it comes to engaging with pharma companies and their sales representatives through digital channels. Pharma marketers need to truly understand where the HCPs are in their customer journey, their content and channel preferences, evolving needs, and what drives their behavior to deliver a great customer experience and build a long-lasting relationship. At Indegene, we started surveying HCPs since 2014 to identify how their digital habits manifest and how do they change. In comparison to 2019, the fourth edition of this study revealed some interesting changes as HCPs, pharma companies, and patients adopted digital approaches at an accelerated pace. HCPs' digital channel preferences have a huge impact on how pharma marketers engage them. And this report endeavors to provide exactly these insights so that marketers can build omnichannel experiences that create better HCP engagement and commercial success for their brands.

As HCPs get more digitally savvy, pharma marketers should understand that engaging physicians through channels and time of their preference with content that is relevant to the individual customer is no more an option, but the critical factor to ensure success for any of their multichannel marketing initiatives. However, these preferences often vary at a regional, experience, and specialty level which is a critical input for pharma marketers to plan their multichannel marketing initiatives. This report slices and dices our findings from the survey by regions, specialties, HCP experience levels, channels, devices, content type, and its consumption time—so pharma marketers can plan their omnichannel marketing strategies for maximum impact and efficiency.

Our study yielded the following key findings:

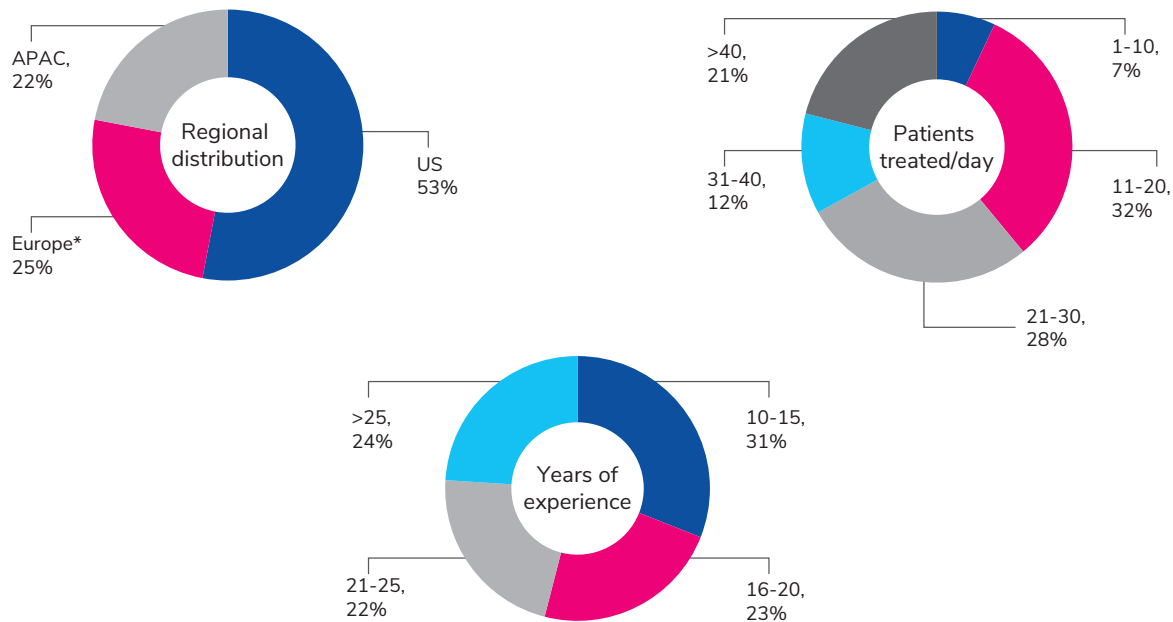
- 77% of HCPs use digital channels primarily for personal learning and development. For remote interactions with pharma representatives, 58% of HCPs indicated flexibility to schedule and reschedule meetings as the main reason for using digital channels.
- 70% of HCPs said that pharma representatives do not understand their requirements completely. Further, 62% of HCPs said that the most significant area where pharma representatives can add value is, by understanding the needs of HCPs and sharing only relevant content with them to make the interactions more insightful. The one-size-fits-all approach will no longer work, and pharma companies will have to invest in greater personalization at scale and build better content development and operations capabilities.
- With 68% of HCPs indicating webinars or webcasts as their most preferred channel to receive information, it is evident that HCPs are extremely time constraint and prefer to engage with pharma organizations on their own terms when it comes to channel, content, and type of devices.

The Digitally-Savvy HCP

- Only 47% of HCPs prefer receiving communication through the marketing email channel. At the same time, marketing emails are among the top 5 channels used by pharma companies to engage HCPs. Pharma companies need to better understand the HCPs preference for receiving content on digital channels in order to bridge such gaps.
- 62% of HCPs are overwhelmed by product promotional content pushed by pharma companies on various digital channels.
- 50% of HCPs preferred to receive promotional content on their mobile or tablet while 62% of HCPs and 57% of HCPs preferred to receive clinical and medical content on computer/laptops respectively.

Our Study Represented HCPs Across Geographies, Specialties, And Experience

We surveyed 984 physicians from the United States, Europe (the United Kingdom, France, Germany, Spain, and Italy), India, and China for this study. All participants have >10 years of experience and represent a broad spectrum of specialty areas as shown below.



*Europe: UK, Germany, France, Spain, Italy *APAC: China, India

The Digitally-Savvy HCP

Specialty*	Percentage	Specialty*	Percentage
Primary Care Physician	18%	Endocrinology	6%
Internal Medicine	18%	Dermatology	6%
Family Medicine	18%	Psychiatry	6%
Pediatrics	10%	Geriatrics	5%
Emergency Medicine	10%	Orthopedics	5%
Cardiology	9%	General Surgery	5%
Oncology	9%	Ophthalmology	5%
Obstetrics and Gynecology	8%	Neurology	5%
Gastroenterology	7%	Urology	4%
Pulmonology	7%	Immunology	4%
		Others	5%

* Percentages do not add up to a hundred as some respondents have >1 specialty.

HCPs Extensively Use Digital Channels Primarily For Learning And Development

For a significant part of the past 18 months, HCPs have been overworked with a majority of them working extended hours or at full capacity. Moreover, the pandemic also ushered in certain changes in HCPs' content and channel preferences. While the rise in digital channels and advancement in technologies have helped pharma organizations to reach out to HCPs, it is important for them to understand HCP behavior and their preferences when it comes to content and digital channels to deliver a great customer experience.

We asked HCPs how extensively they used digital channels for various activities related to learning, networking, telemedicine, and remote engagement. Globally, HCPs used digital channels mainly for personal learning and development (77%), followed by video conferencing for professional networking (68%), and telemedicine/telehealth practice with patients (63%), as shown in Figure 1. While the adoption of digital channels for remote engagement has increased in the recent past, HCPs' usage of such channels for remote interactions with pharma companies or for monitoring patients remotely could be better.

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Figure 1: What purposes do HCPs use digital channels for?

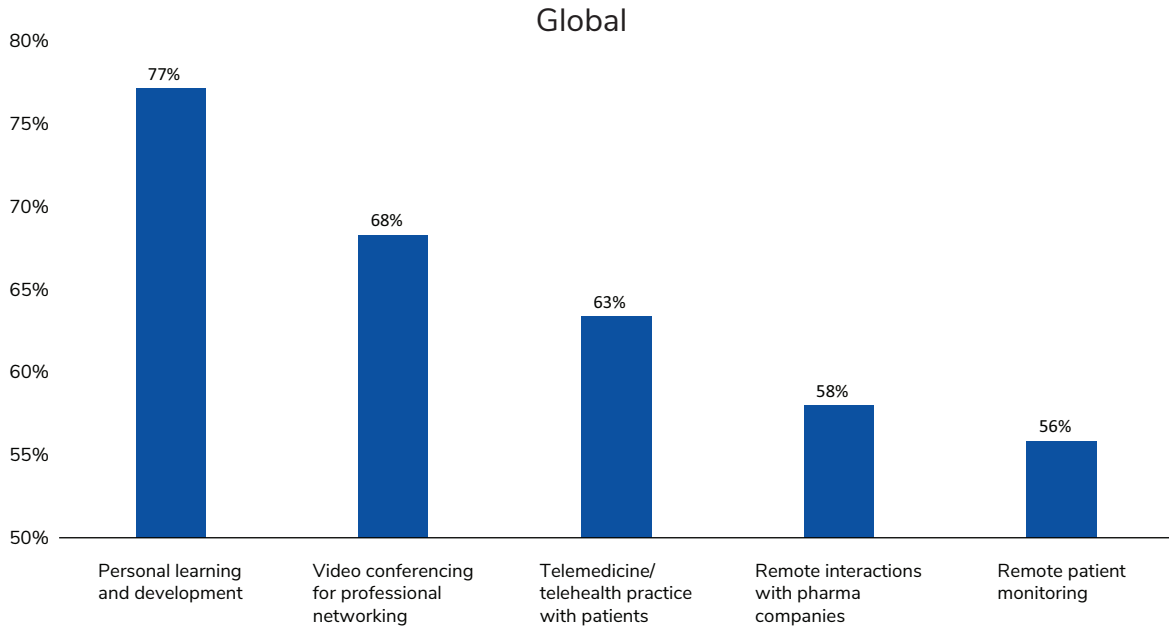
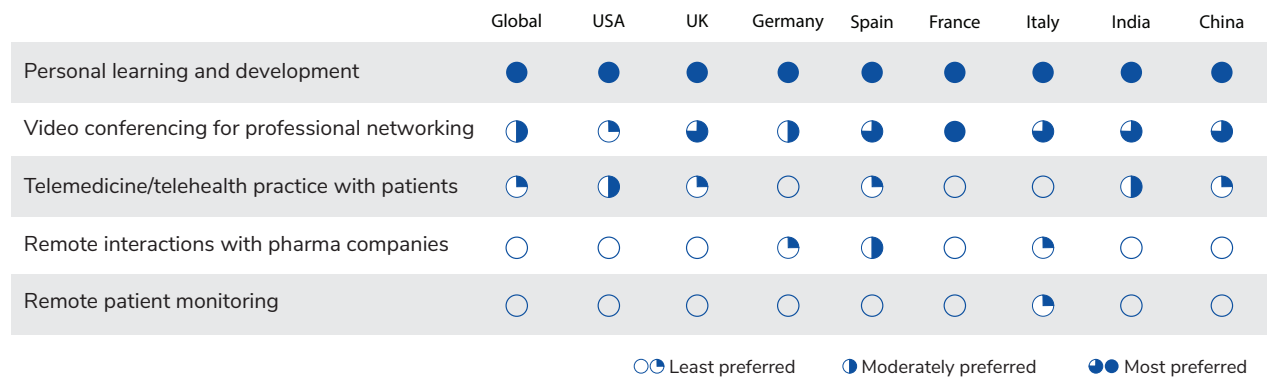


Figure 2 provides the distribution of main reasons for which HCPs use digital channels at a regional level. Apart from the United States and after Germany, HCPs in all other regions are keen on using digital channels for video conferencing for professional networking. Furthermore, HCPs from India and the United States are more open to using digital channels for telemedicine/telehealth when compared with HCPs from China and the EU region (the United Kingdom, Germany, Spain, France and Italy).

Figure 2: What purposes do HCPs use digital channels for? (regional distribution)



The Digitally-Savvy HCP

In terms of specialties, >76% of HCPs across the board responded that learning and development was their main reason for using digital channels, followed by video conferencing for professional networking (68%) and telemedicine and telehealth practice with patients (63%). The same trends were observed for HCPs with different experience levels indicating that the primary purpose for which HCPs are adopting digital channels are consistent across specialty and years of work experience.

HCPs Device Preferences Vary By Region And Content Type

Figure 3: Which devices do HCPs prefer to consume clinical, medical, and promotional information?

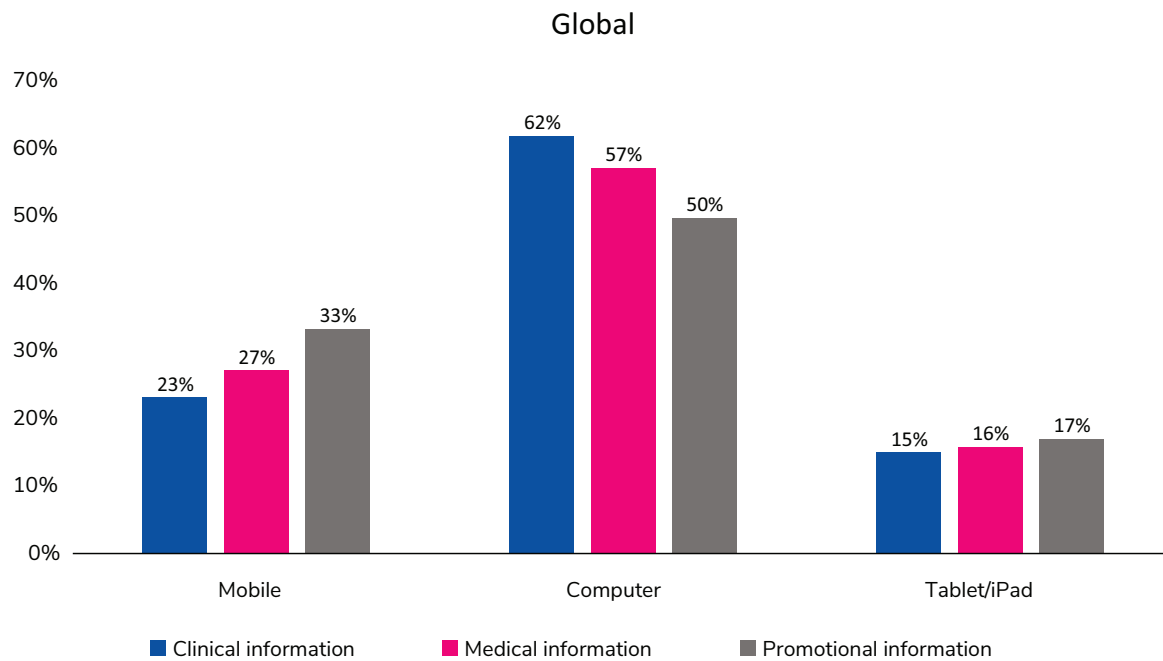
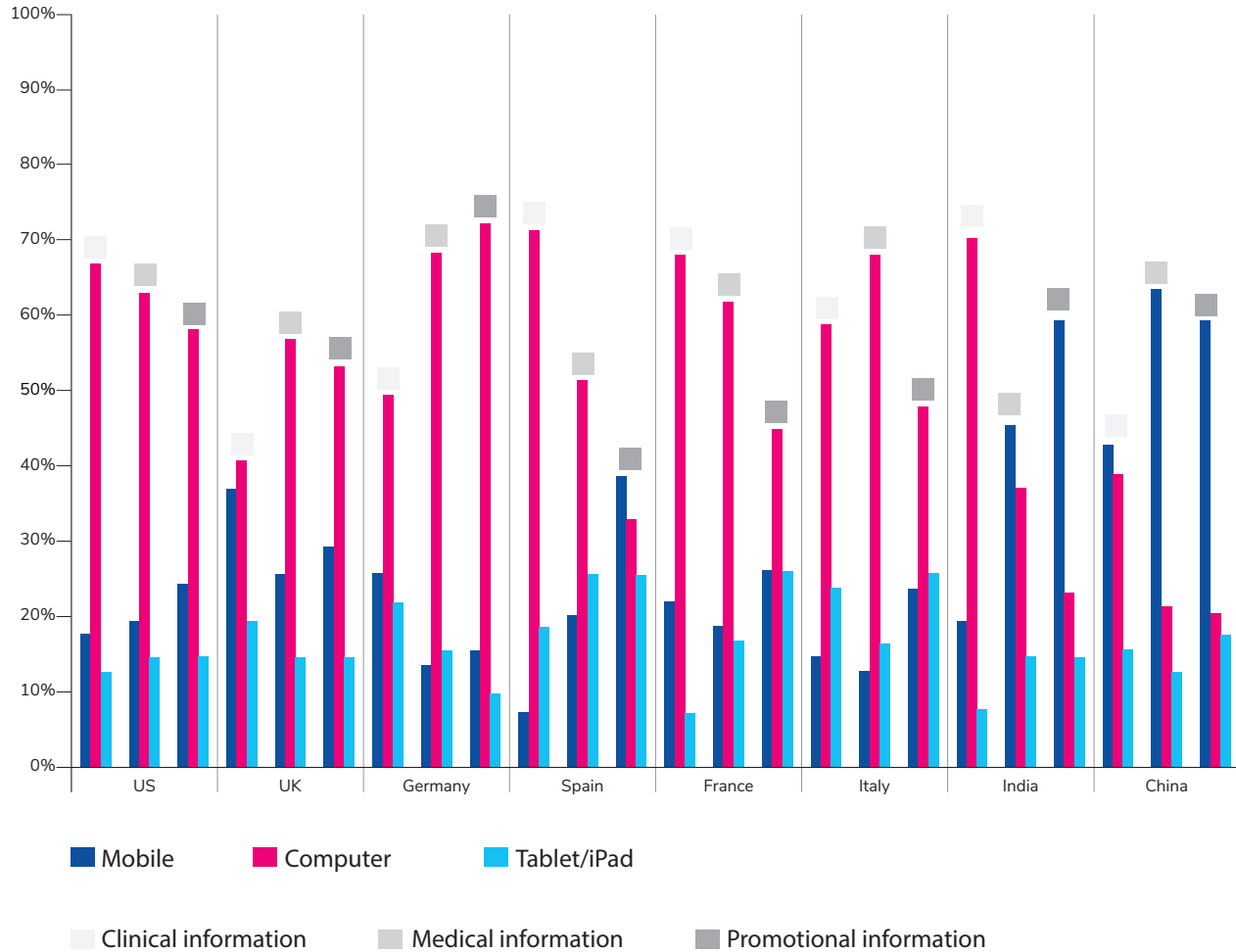


Figure 4: Which devices do HCPs prefer to consume clinical, medical, and promotional information? (regional distribution)



As pharma marketers improve their marketing strategies by incorporating multiple formats, channels, and analytics, it is extremely important for them to build content and communication strategies that are accessible to HCPs via multiple devices. Figure 4 illustrates the devices that HCPs prefer to access the various types of information. As illustrated, HCPs based out of China and India prefer using a mobile device for medical and promotional information, whereas a computer/laptop is the most preferred device for HCPs in the United States and Europe.

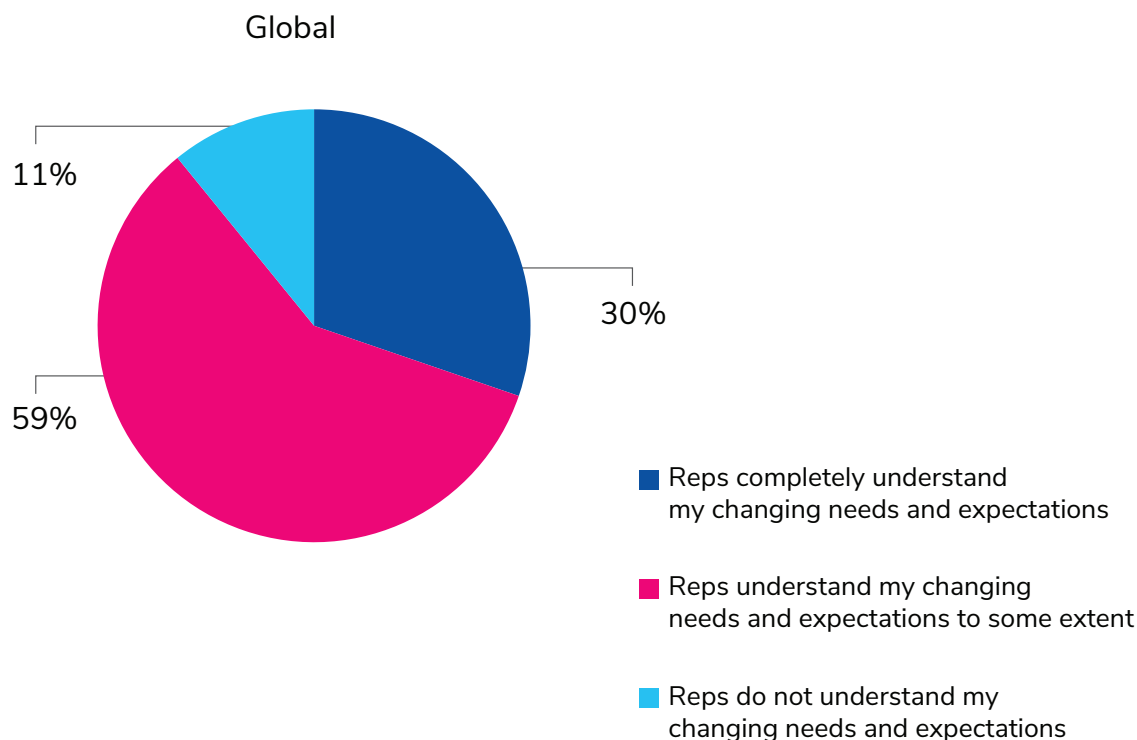
It is important for pharma companies to note this pattern and select the appropriate channel, content, format, and device to reach out to HCPs. For instance, in India and China, since HCPs prefer mobile devices, the frequency of them accessing platforms or applications will be high; however, the time they spend on these channels could be extremely limited. Thus, it is important that pharma marketers build hyper-focused HCP segments and create crisp, short, and modular content that is educational, factual, and

easily consumable on mobile devices. On the other hand, this approach holds good for the United States and Europe as well, where HCPs largely prefer to consume content on a computer/laptop due to which, pharma marketers have the flexibility to create more in-depth and elaborate content and format.

HCPs from China prefer to consume clinical, medical, and promotional information over mobile devices followed by computer/laptops and tablets. Similar trends can also be observed for HCPs from India who prefer mobile devices for consuming medical and promotional information and computer/laptops for consuming clinical information. Our data also indicate that younger HCPs are more willing to consume promotional information over mobile as compared with their senior counterparts. Furthermore, the survey indicates that physicians from Internal Medicine, Cardiology, Ophthalmology, Orthopedics, Pulmonology, Urology, Emergency Medicine, General Surgery, and Immunology are more open to consuming promotional information over mobile compared with the physicians from other specialty areas.

HCPs Are Not Sure That Pharma Representatives Understand Their Requirements Completely

Figure 5: How do HCPs feel about pharma representatives' understanding of the HCPs requirements during COVID-19?



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Figure 6: How do HCPs across regions feel about pharma representatives' understanding of the HCPs requirements during Covid-19?

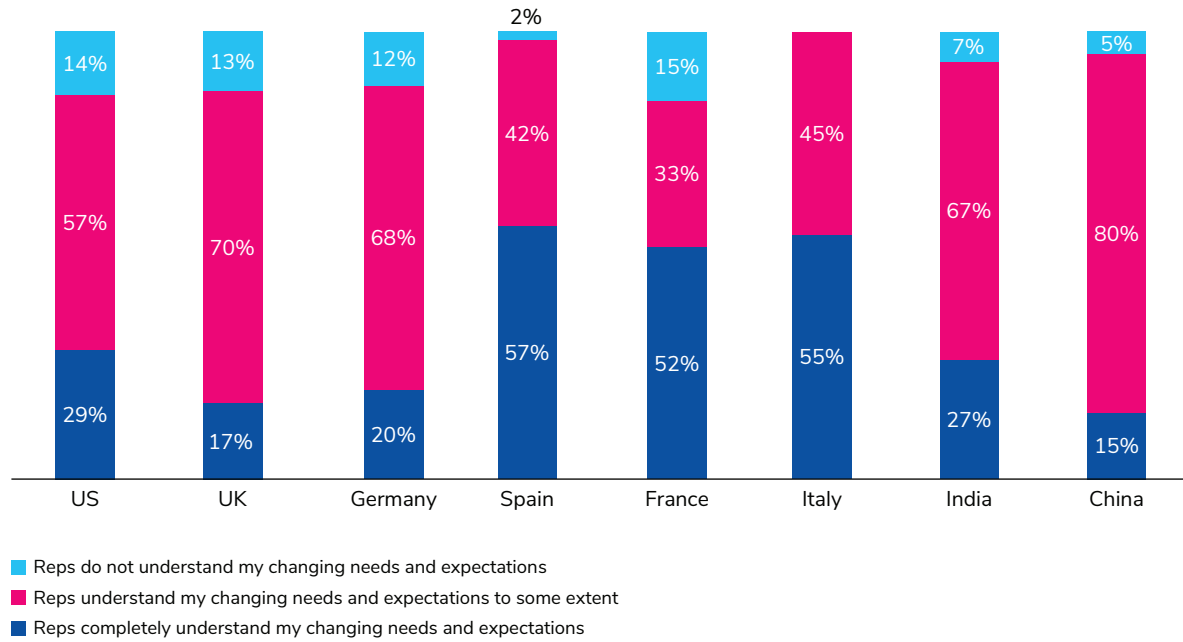
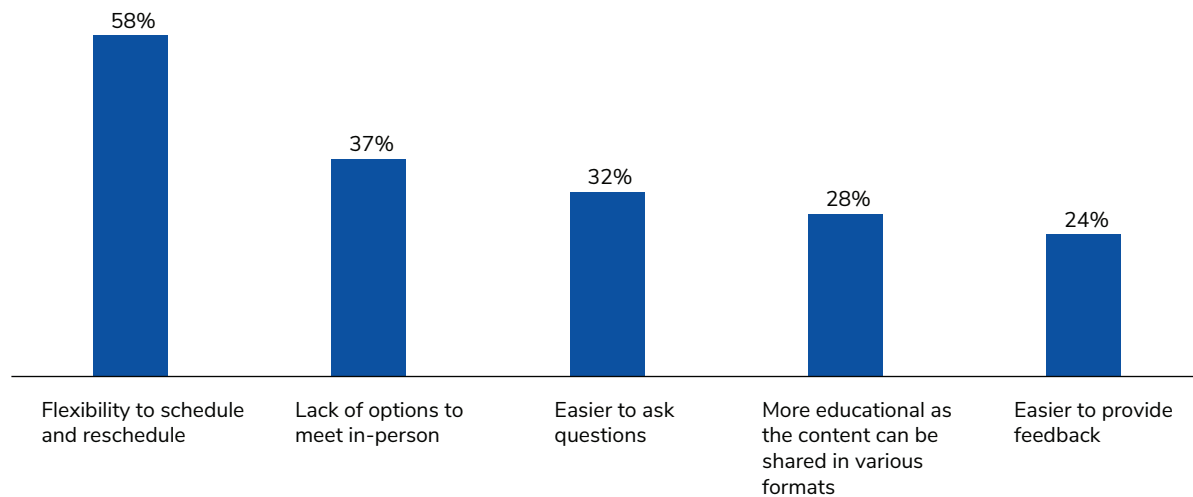


Figure 7: What are the motivations of HCPs to meet pharma representatives remotely versus in-person?

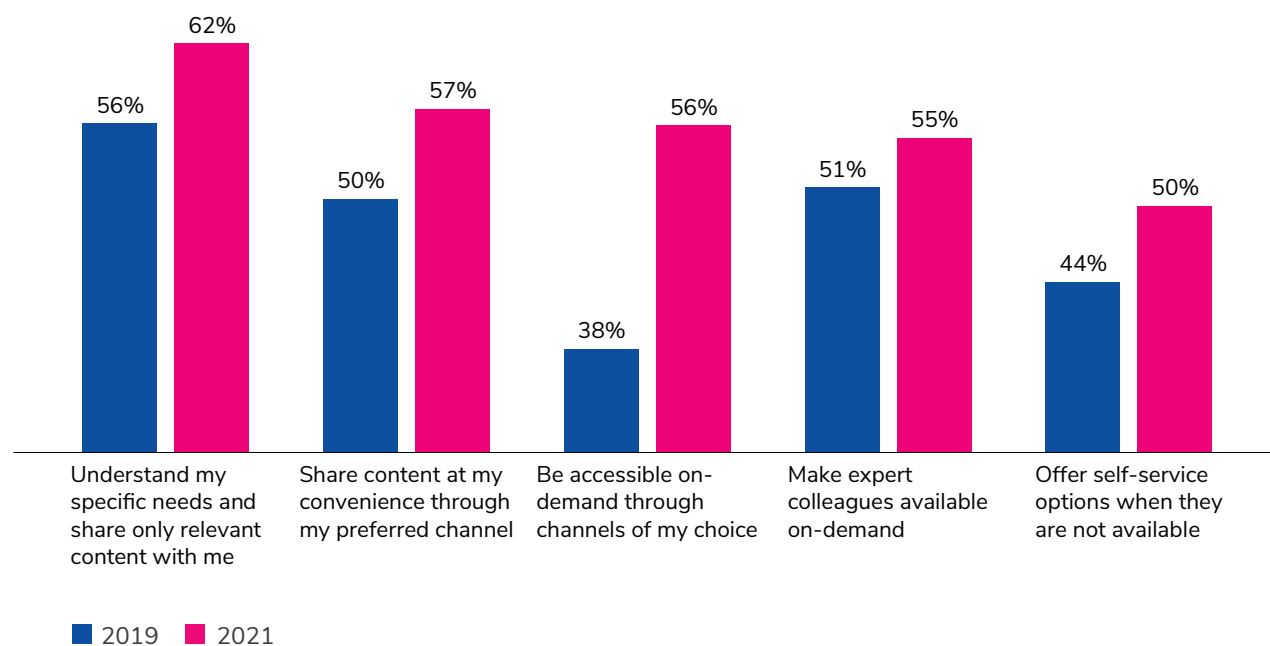


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Since the beginning of the pandemic, in-person discussions with pharma representatives have declined steeply. In response, pharma companies had to train their sales force not just to use digital channels but also to help them have useful discussions with HCPs virtually. Globally, 59% of HCPs are still not sure if pharma representatives understand the HCPs requirements completely, as shown in Figure 5. With pharma companies investing resources in multichannel engagement frameworks, there will be a stronger need for a digitally-savvy sales force that can recreate the in-person experience using virtual channels. Given the important connection of the sales force between the industry and HCPs, companies who do not prioritize this stand to lose out on their ability to engage physicians.

More than 50% of HCPs in Europe (excluding Germany), the United States, India, and China prefer to meet representatives remotely because of the flexibility in scheduling appointments. For HCPs in India and China, apart from this factor, the ability to access more educational content in various formats was a driving factor to prefer remote engagement models.

Figure 8: How did HCPs' sense of value for pharma representatives change from 2019 to 2021?

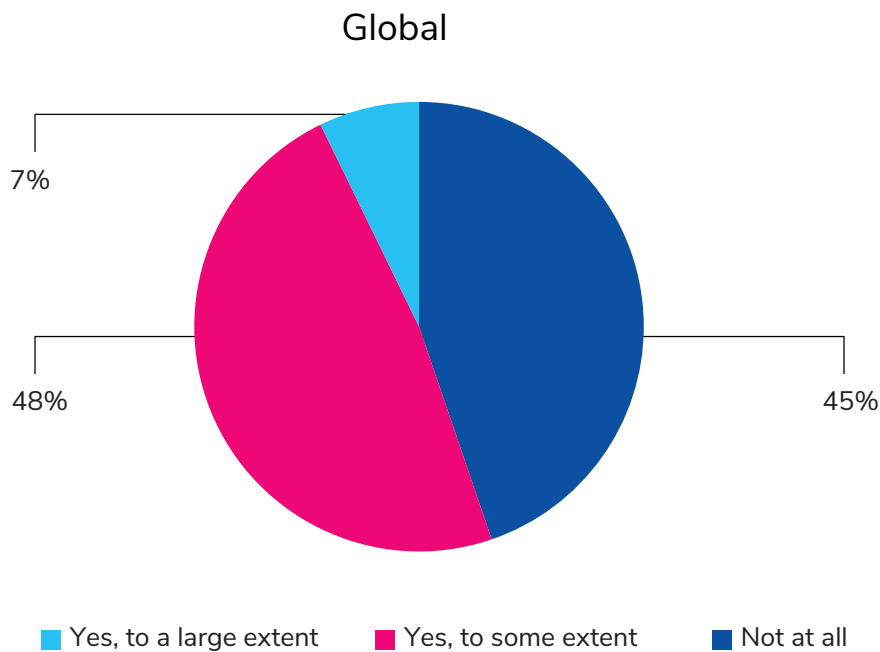


As in-patient visits reduced because of the pandemic, the demand for nuanced and insightful content on topics such as treatment options and patient education has substantially increased. Just like pharma companies, HCPs also need the resources to ensure that the patient journey is seamless and effective in a virtual setting. As seen in Figure 8, 62% of HCPs believe that the most significant area where pharma representatives can add value is by understanding the need of HCPs and sharing only relevant content.

This trend is equally prevalent across regions, with HCPs stating that understanding the specific needs of HCPs and sharing relevant content with the HCPs through a channel that they prefer was the most significant way in which pharma representatives could add value to their interactions. Thus, for pharma representatives, having a content library handy for specific personas before their appointment not just improves the engagement levels, but also generates a strong sense of value that the representatives are providing to the physician by showing that you are completely aligned with the HCPs requirements.

HCPs Are Overwhelmed With Overtly Promotional Content

Figure 9: How overwhelmed do HCPs feel with content shared by pharma companies in the past 12 months?



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Figure 10: How overwhelmed do HCPs across regions feel with content shared by pharma companies in the past 12 months?

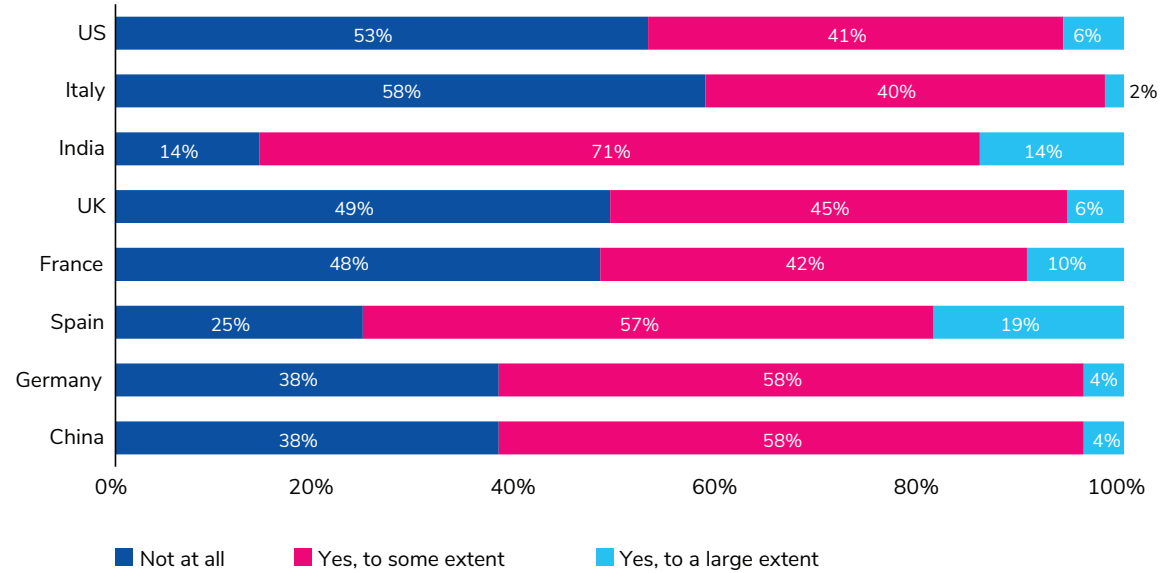


Figure 11: How overwhelmed do HCPs across specialties feel with content shared by pharma companies in the past 12 months?

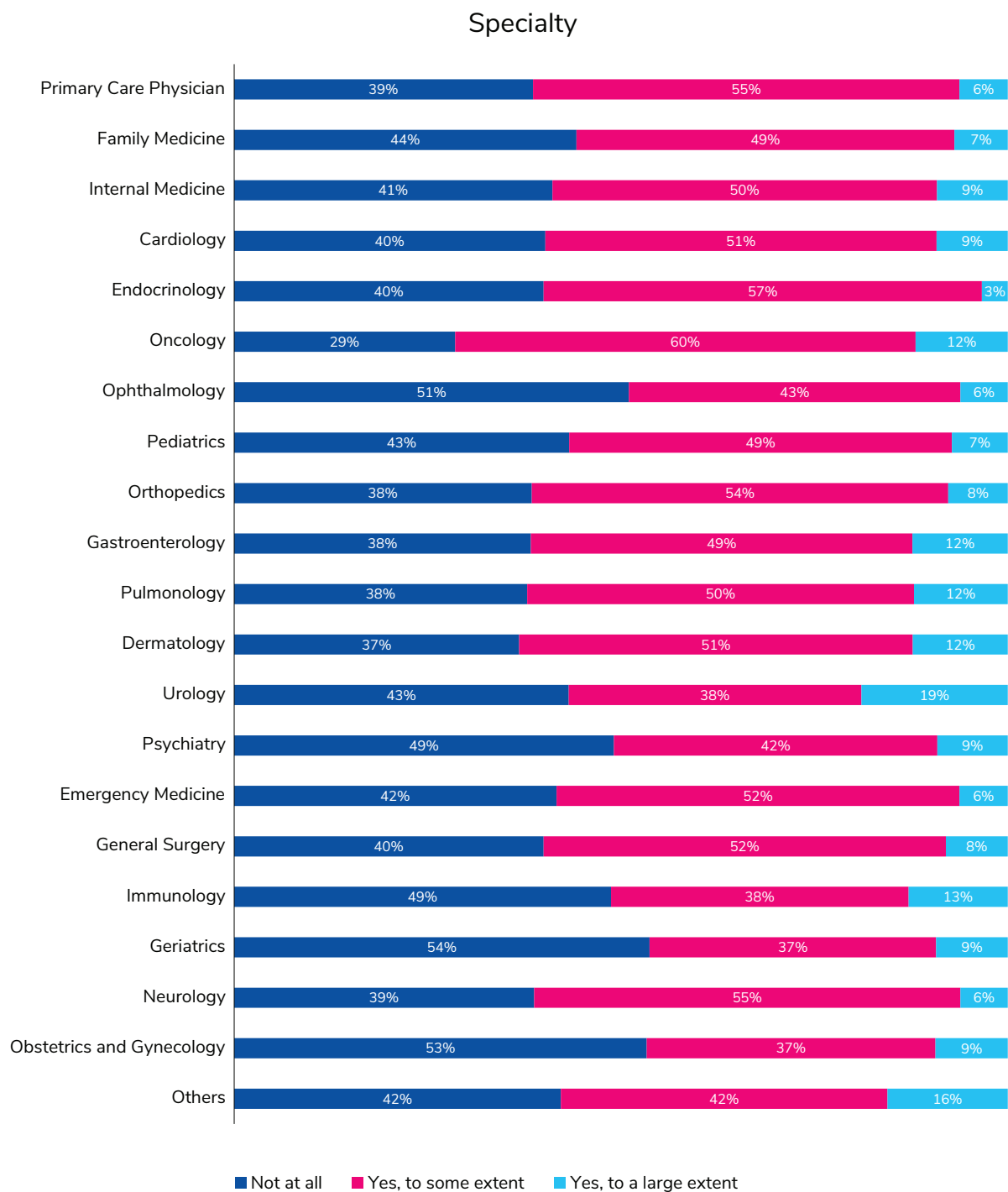


Figure 12: Which type of content are HCPs overwhelmed with?

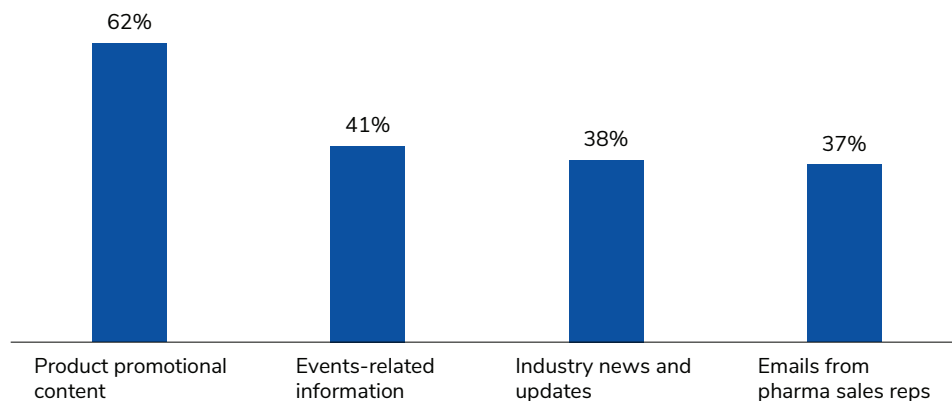


Figure 13: Percentage of HCPs across regions feel overwhelmed with product promotional content

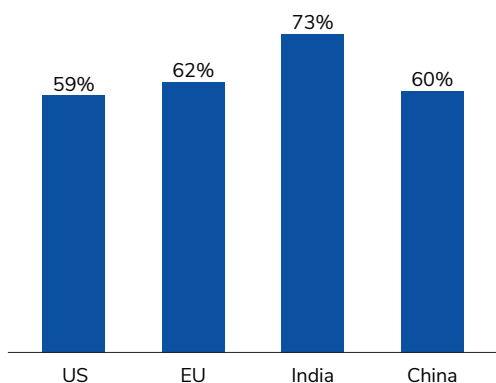
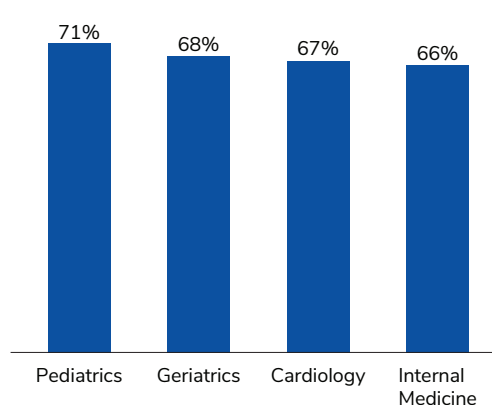


Figure 14: Percentage of HCPs across top 4 specialties who feel overwhelmed with product promotional content

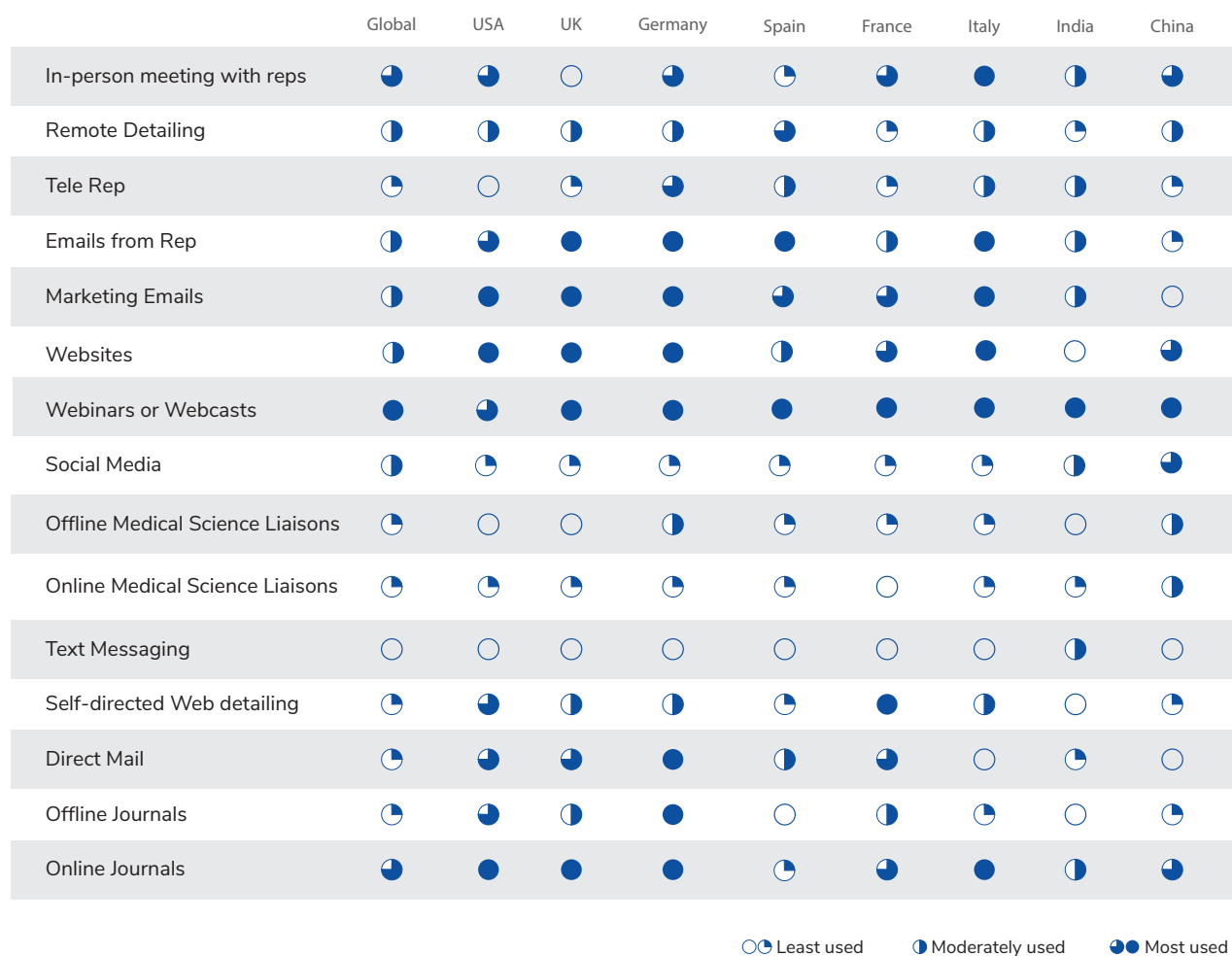


Content in the pharma industry continues to be heavily representative-centric. Although pharma companies added digital content, a mere conversion of offline content to online edition is suboptimal. In earlier sections of the report, we highlighted how the adoption of digital channels by HCPs is gaining momentum. However, globally, 62% of physicians are overwhelmed by the content they receive from pharma companies, mainly due to excessive product promotional content information, as depicted in Figure 12. For pharma companies, this insight is alarming because if physicians associate certain brands with merely such promotional content, it will become extremely difficult for the former to position themselves as a trusted partner who enables HCPs to deliver improved health outcomes.

HCPs Are Increasingly Adopting Digital Channels To Consume Content

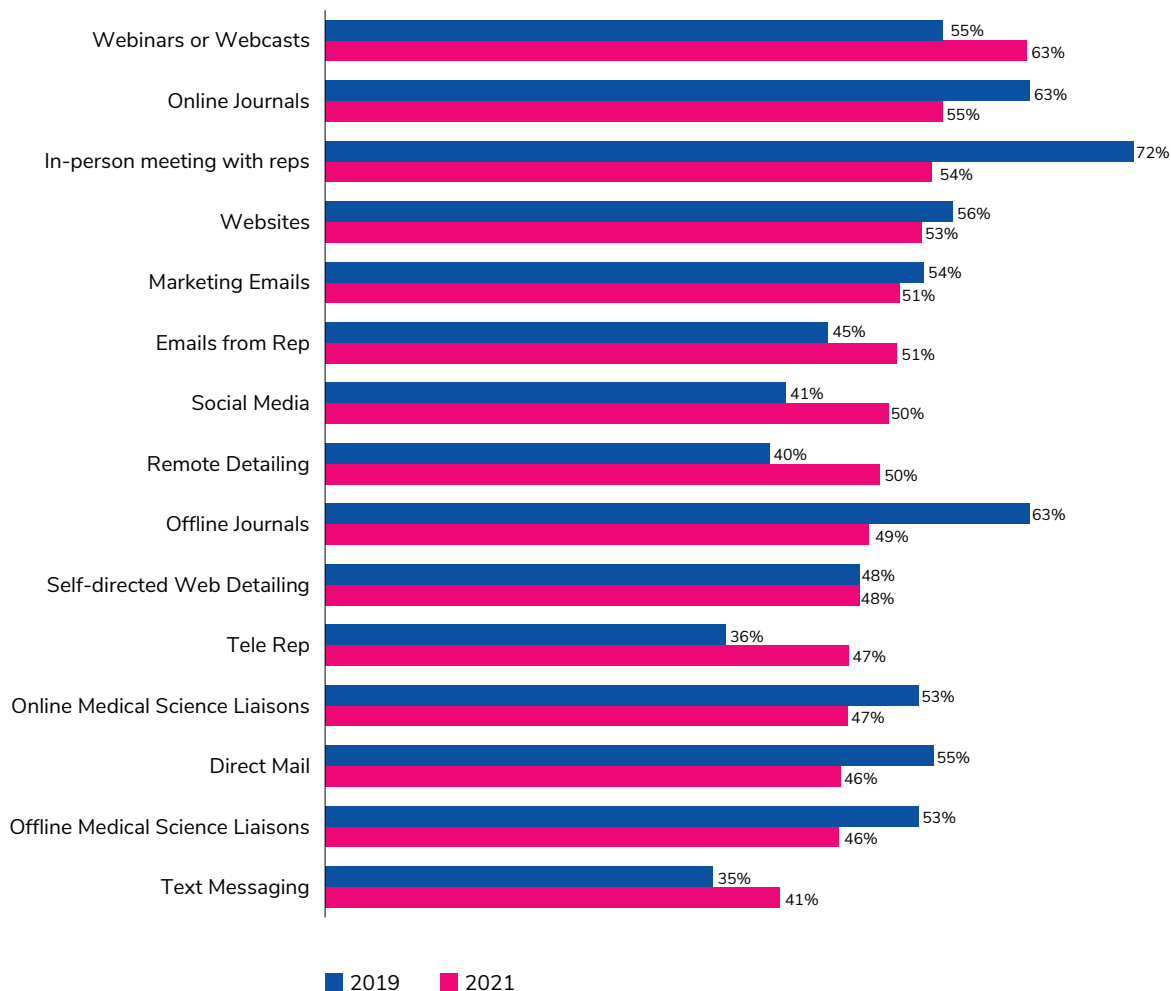
Pharma organizations are increasingly using webinars and online journals to share medical and promotional information, while still relying on a conventional face-to-face channel to engage with HCPs.

Figure 15: Which channels do pharma companies use to engage with HCPs?



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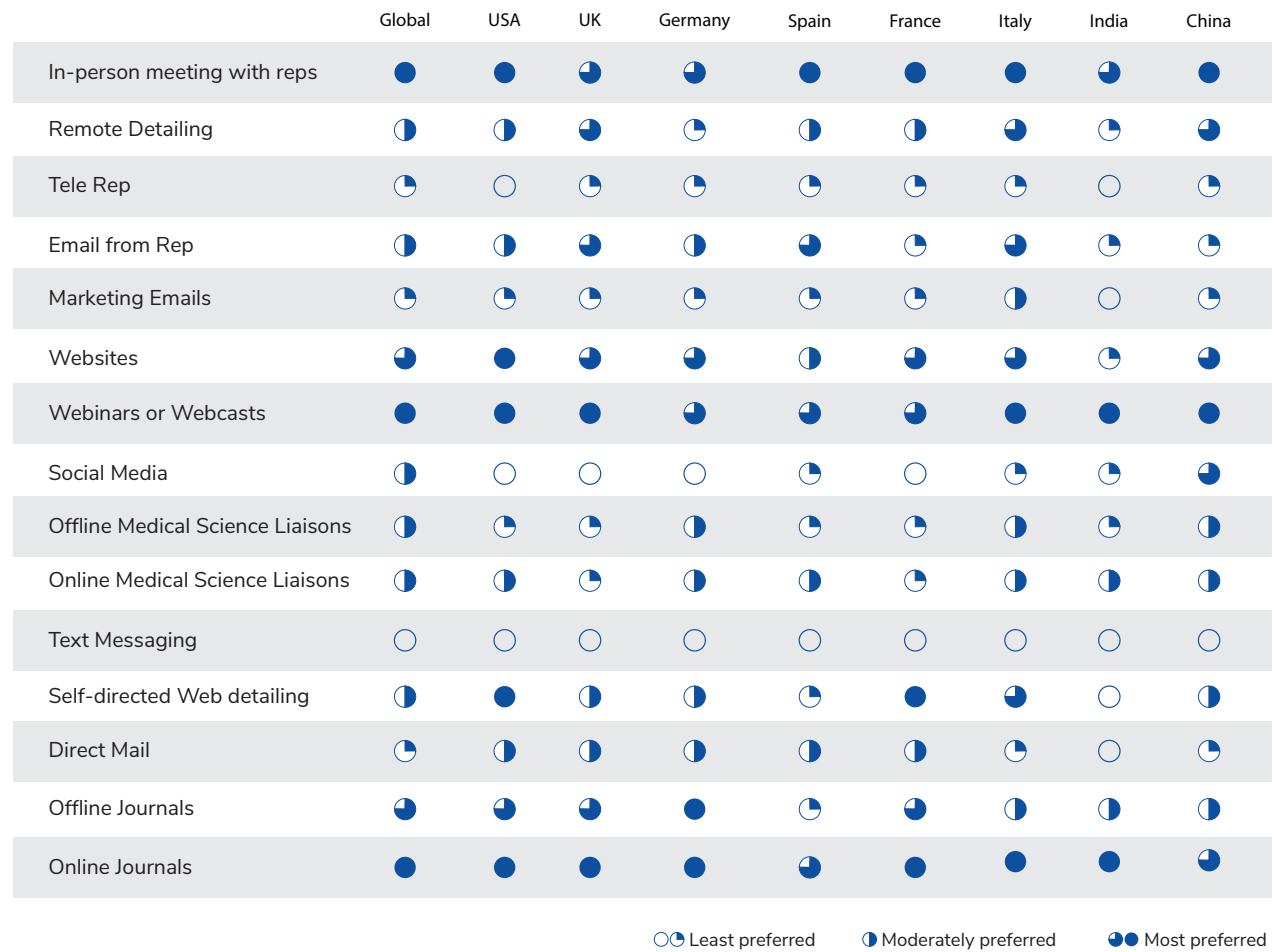
Figure 16: How did pharma companies' use of channels to engage with HCPs change from 2019 to 2021?



In 2021, the top 5 channels used by pharma companies to engage with HCPs are webinars and webcasts, online journals, in-person meetings with reps, websites, and marketing emails (Figure 16). When we probed HCPs about their channel preference to receive communication from pharma companies, they cited webinars and webcasts, in-person meeting discussions, online journals, websites, and offline journals as the most common ones (Figure 17). The preference for webinars is especially correlated to the prevalence of Covid-19.

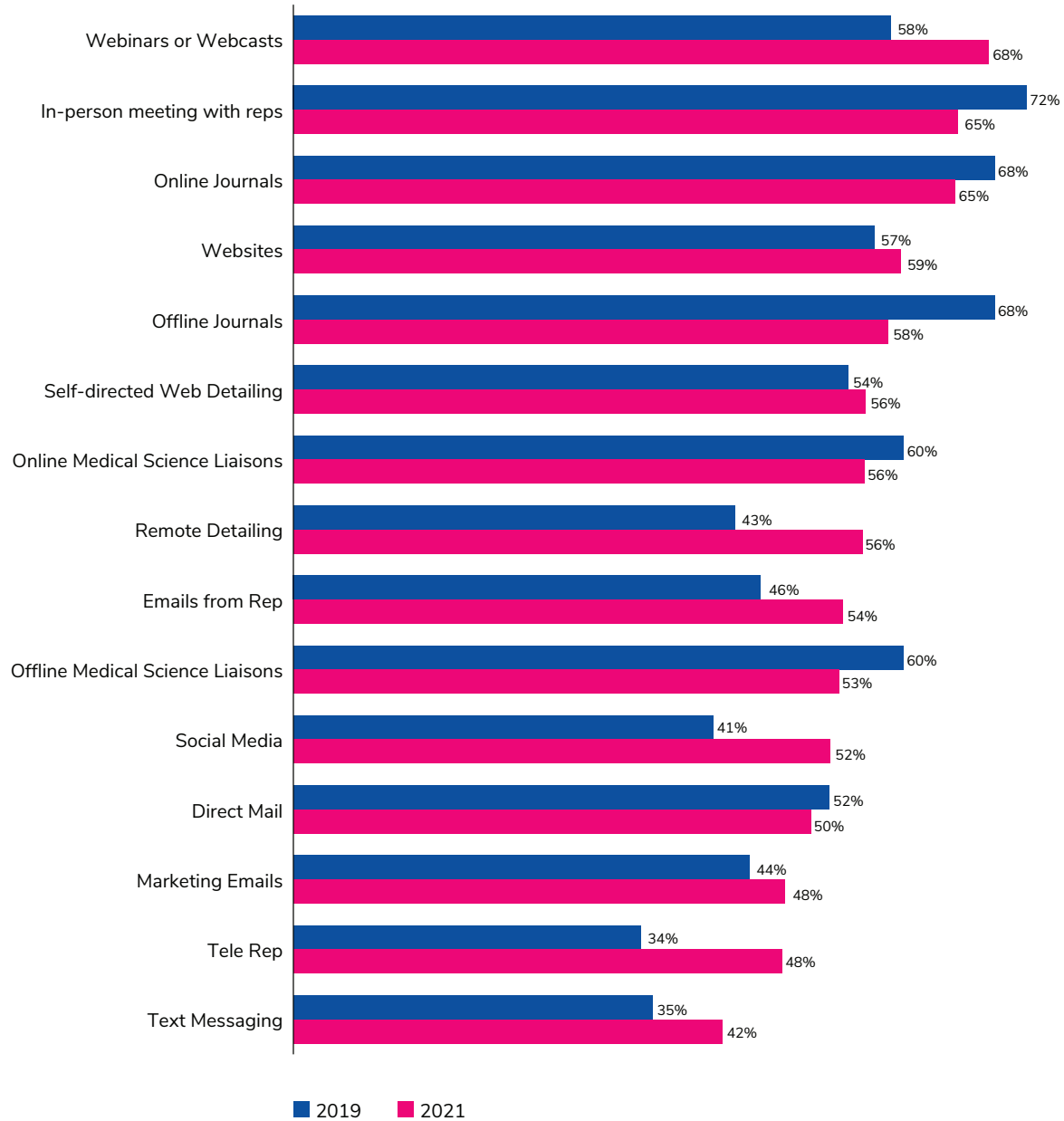
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Figure 17: Which channels do HCPs prefer to receive content from pharma companies?



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Figure 18: How did HCPs' channel preference to receive medical and promotional information from pharma companies change from 2019 to 2021?



However, it is interesting to note that 65% of HCPs still prefer to engage via in-person meetings with reps as seen in Figure 18. It implies that this channel should still be a core element of a successful, integrated online, in-person and remote engagement framework. At the same time, a well-planned digital channel strategy can act as the accelerator for pharma companies to get not just the foot in the door, but also to develop efficient and effective hybrid engagement models. For example, medical and scientific journals, websites, marketing emails, and social media can be used to personalize the customer journey to augment the effectiveness of face-to-face discussions. This also highlights the need for the pharma industry to take inspiration from digitally mature industries and move away from a siloed approach, and implement sustainable and insightful measurement frameworks that can effectively assess end-to-end customer journeys.

HCPs Prefer Short Webinars Over Other Virtual Engagement Channels

Figure 19: Which virtual formats did HCPs most engage with?

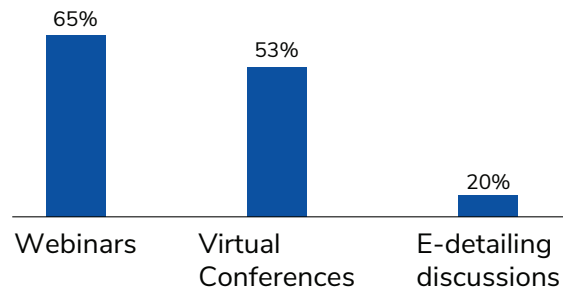


Figure 20: HCPs preference for webinars across regions

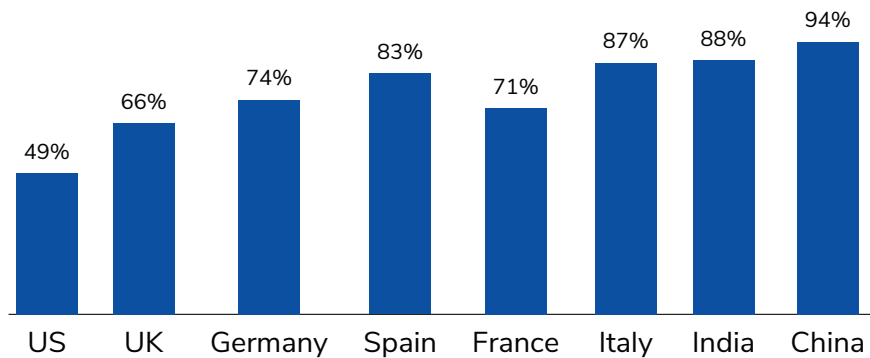
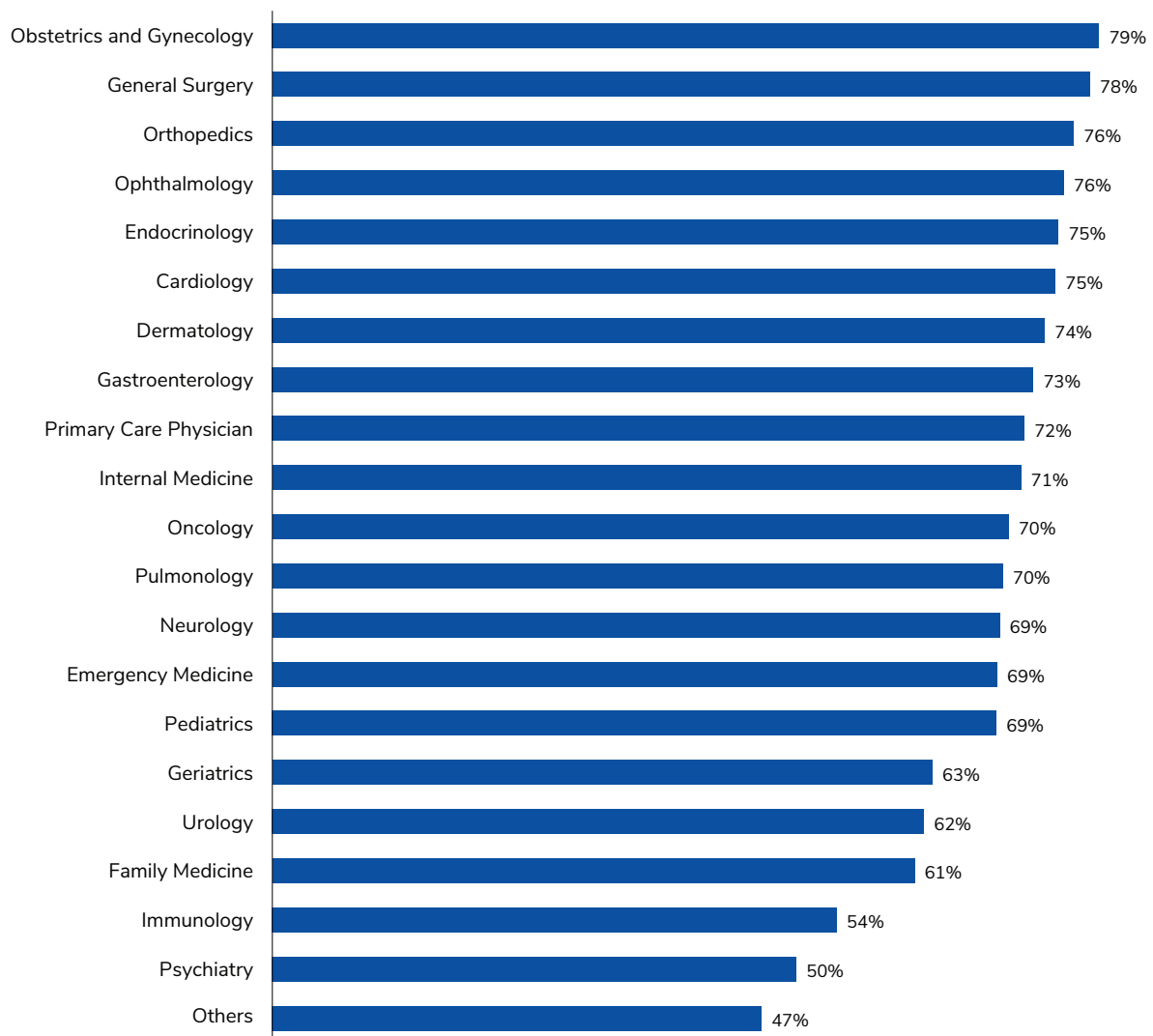


Figure 21: How did HCPs' preference for webinars change across specialties?



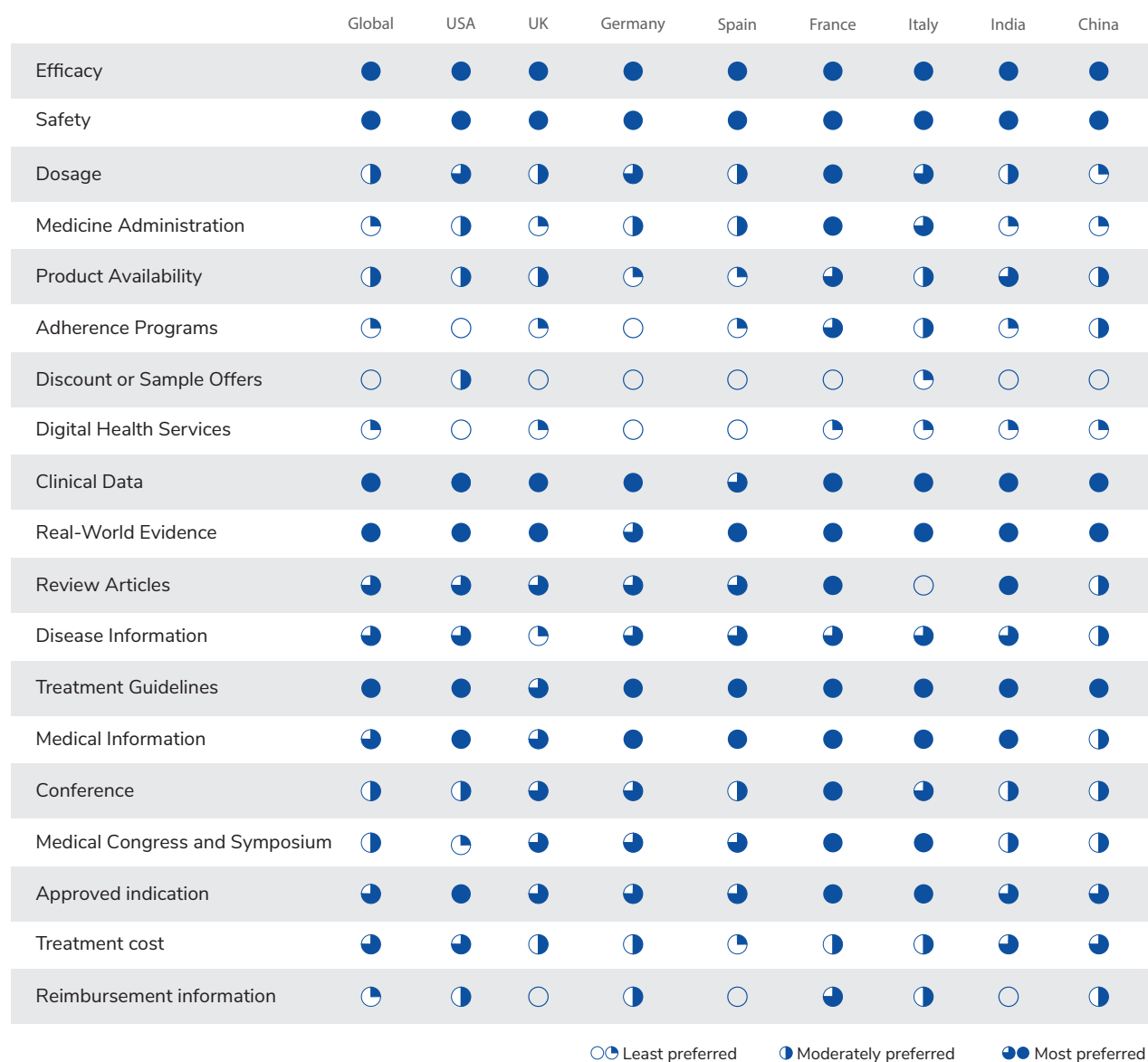
During the pandemic, many pharma companies shifted to virtual engagement formats and hosted numerous virtual conferences. However, globally as well as regionally, the interest/attendance in virtual conferences is significantly lesser than webinars. This could be because of the extremely busy schedule of most HCPs who had to treat Covid-19 patients in addition to those from their specialty, as well as the digital fatigue induced by the sheer large volume of virtual events hosted in the past 18 months. These factors also validate the steep interest in short virtual discussion formats such as webinars.

As the pandemic situation recedes globally, pharma companies will resort to hosting in-person events. However, virtual engagement formats that were extensively used in the past 18 months will become an integral part of the new hybrid engagement model. Therefore, as the pharma industry continues

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to explore the best ways to host and manage virtual engagement platforms to deliver the best user or attendee experience, it is important to invest in resources and build a measurement framework to assess the effectiveness of such events. A rigorous and updated understanding of HCPs' preferences will play a critical role in ensuring that pharma companies achieve the Return on Investment (ROI) they seek from such outreach.

Figure 22: Which type of information do HCPs prefer to receive from pharma companies?

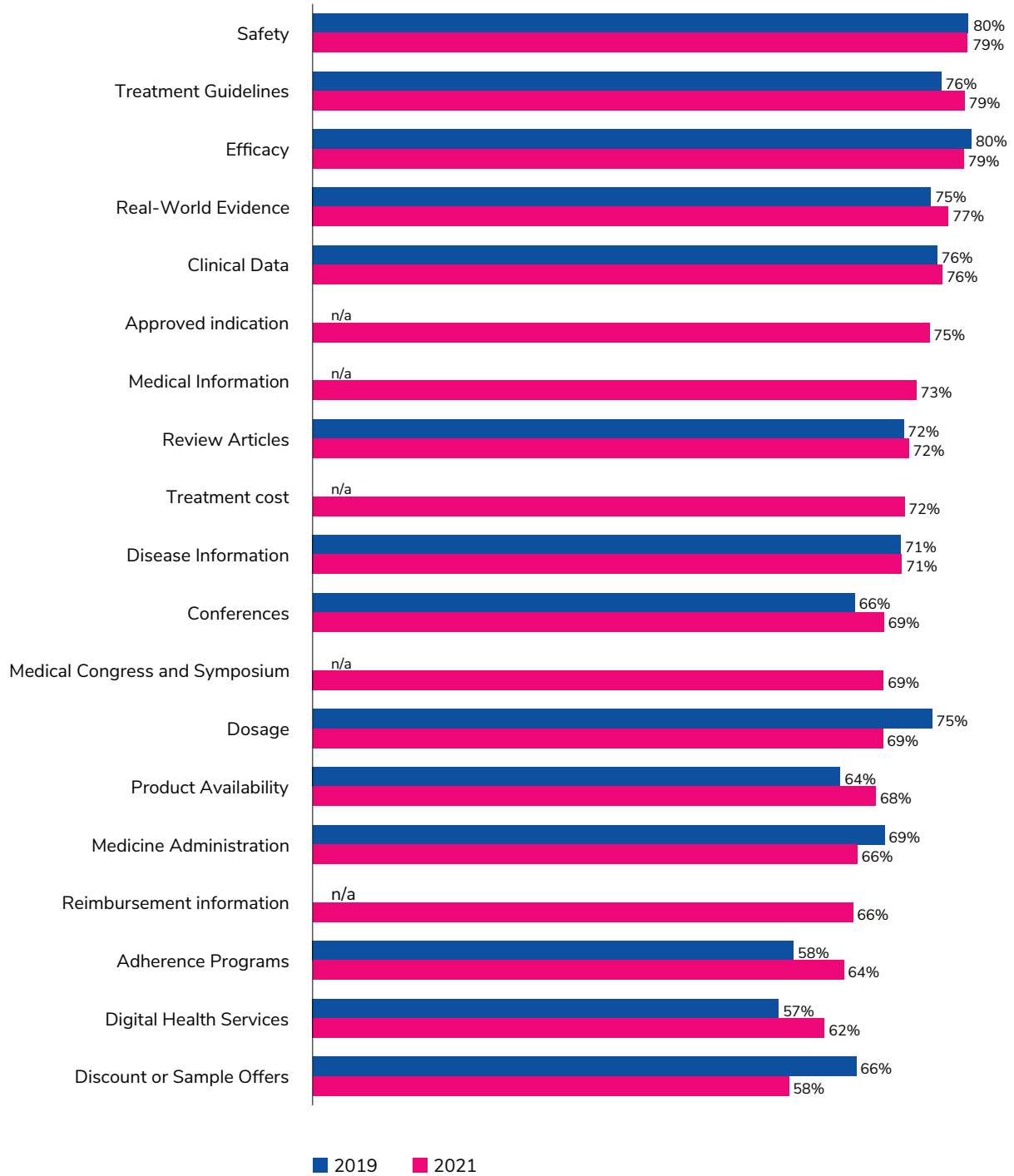


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Figure 22 illustrates the type of content HCPs prefer to receive from pharma companies. As in previous surveys, product-related information such as safety, efficacy, and treatment guidelines continue to be the most sought-after data by HCPs globally. Their increased interest in understanding treatment guidelines, RWE, and clinical data mainly stem from the Covid-19 pandemic as HCPs invest more time to understand the disease and vaccine development updates. Meanwhile, new categories such as approved indication, medical information, and treatment cost are also the topics that physicians would like to access from the various channels used by pharma companies.

The information presented in Figure 22 is especially helpful for pharma companies that already have an audience or physicians' cohort, familiar with the brand. Pharma marketers can craft consistent, personalized, and multi-touch messaging using the right channels and formats to improve engagement.

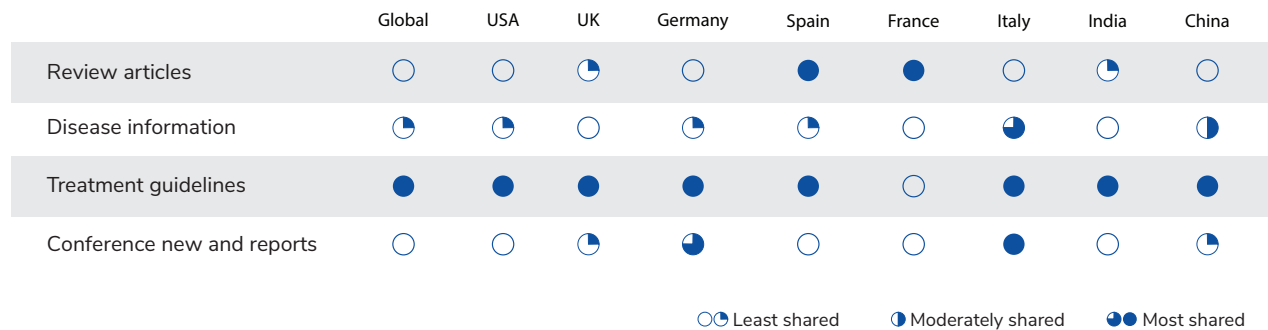
Figure 23: How did HCPs' preference for type of information change from 2019 to 2021?



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As shown in Figure 23, HCPs' preferences for the type of information they would like to receive from pharma companies have not changed much across the top categories. With the rise in digital offerings and the impact of the pandemic on in-person interactions, HCPs are looking to receive more content that is addressed toward adherence programs and digital health services. At the same time, HCPs are overwhelmed with overtly promotional content and would like to receive less content that is directed toward discounts or sample offers.

Figure 24: What type of content do HCPs share with their peers?



As shown in Figure 24, physicians across the board extensively share treatment guidelines with their peer network. A key factor driving this could be the pandemic situation, in which HCPs had to treat Covid-19 patients apart from their specialty. Thus, they had to leverage their peer network to get in-depth information on treatment guidelines to deliver the best health outcomes to their patients. This also reflects the fact that HCP peer networks are more interested in educational content that can improve their practice. Pharma marketers need to take note of this point and craft their HCP communication strategies with an informative content mindset, since these types of messages are welcomed by HCPs because they strengthen their knowledge about a specific condition without disrupting the daily operations.

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Figure 25: Which sources do HCPs frequently use to access information?

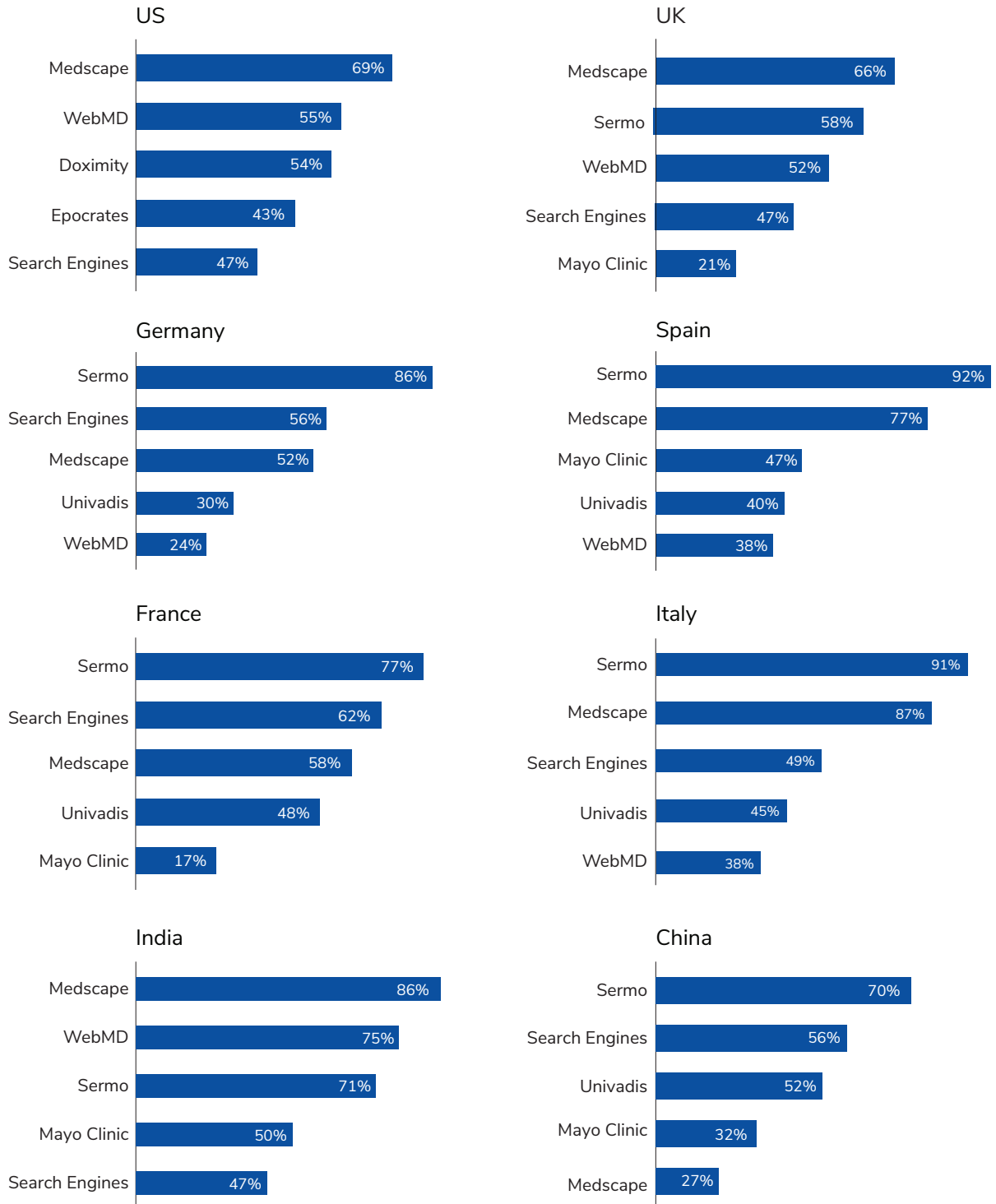


Figure 25 presents the top 5 sources HCPs use to access medical information. When it comes to accessing clinical and medical information or educational content, HCPs prefer to use independent websites, private medical networks, and websites maintained by universities or nonprofit organizations that they know and trust as compared with pharma companies' own websites. Most European HCPs use Sermo, which indicates that HCPs are more inclined toward active and engaging discussions with their peers on the latest medical trends and developments, treatments guidelines, clinical data, and disease information pertaining to their specialties, followed by the need to build their network for ongoing medical education. In the United States and India, HCPs are more interested in accessing sources such as Medscape and WebMD that provide extensive coverage of clinical information and educational content.

As pharma companies use more digital channels, there will be a continued demand from the medical community for diverse formats of digital content that can be accessible across devices and platforms, especially on mobile apps and social media networks.

Digital Channels Allow Pharma Companies To Engage HCPs At A Time They Prefer

As much as it is important to use the right marketing channels to engage HCPs, it is vital that the content reaches HCPs at a time they prefer. HCPs are extremely busy attending to patients, so pharma organizations need to reach them not just through their preferred channel, but also at their preferred time of the day.

While there is a noticeable shift in channels preferred for engagement, the time and days when HCPs wish to receive content from pharma companies have not changed much since 2019 (Figures 26 and 27). Across all specialties, countries, and experience levels, HCPs prefer to receive or access information from 5:00 pm to 8:00 pm on weekdays and 8:00 pm to 11:00 pm on weekends. For pharma companies, these time preferences are not just significant but also favorable. Unlike face-to-face discussions that are largely time-bound with each appointment constrained to just a few minutes during working hours; digital channels allow pharma companies to engage with HCPs without these constraints.

The Digitally-Savvy HCP

Figure 26: What time did HCPs prefer to receive clinical, medical, and promotional information in 2019?

Day	Before 8:00 am	8:00 am-11.00 am	11:00 am-2.00 pm	2.00 pm-5.00 pm	5.00 pm-8.00 pm	After 8.00 pm
Monday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Tuesday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Wednesday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Thursday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Friday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Saturday	Least preferred	Least preferred	Least preferred	Least preferred	Least preferred	Most preferred
Sunday	Least preferred	Least preferred	Least preferred	Least preferred	Least preferred	Most preferred

Legends:



Figure 27: What time did HCPs prefer to receive, clinical, medical, and promotional information in 2021?

Day	Before 8:00 am	8:00 am-11.00 am	11:00 am-2.00 pm	2.00 pm-5.00 pm	5.00 pm-8.00 pm	After 8.00 pm
Monday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Tuesday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Wednesday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Thursday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Friday	Least preferred	Least preferred	Most preferred	Least preferred	Most preferred	Most preferred
Saturday	Least preferred	Most preferred	Most preferred	Least preferred	Most preferred	Most preferred
Sunday	Least preferred	Most preferred	Most preferred	Least preferred	Most preferred	Most preferred

Legends:



The Digitally-Savvy HCP

At a regional level, HCPs from China prefer to be contacted between 5:00 pm and 8:00 pm on all days including weekends, except Monday, when they prefer to be contacted between 8:00 pm and 11:00 pm. For HCPs from Germany, the preferred time is 5:00 pm to 8:00 pm on all days including weekends. HCPs from Spain and Italy also align with global time preferences. But HCPs from the United Kingdom prefer consuming content between 11:00 am and 2:00 pm on all days. HCPs from India prefer to be contacted between 8:00 pm and 11:00 pm on all days, including weekends. HCPs from the United States consume content between 5:00 pm and 8:00 pm, except on weekends, when they would like to be contacted between 8:00 am to 11:00 am.

In terms of specialty, 5:00 pm to 8:00 pm on weekdays is the preferred time for all physicians except Ophthalmologists and Geriatrics physicians who prefer the 8:00 pm to 11:00 pm slot, Dermatology and Obstetrician-Gynecologist (OBG) physicians who prefer the 11:00 am to 2:00 pm slot, and General Surgeons who prefer the 2:00 pm to 5:00 pm slot. For weekends, the 8:00 pm to 11:00 pm slot is the most preferred slot for all specialty physicians except Orthopedics, Urology, Psychiatry physicians preferred 8:00 am to 11:00 am slot. Primary Care, Family Medicine, Cardiology, pulmonology, Dermatology physicians preferred 11:00 am to 2:00 pm slot, on weekends and Pediatrics physicians preferred the 5:00 pm to 8:00 pm slot.

Conclusion

Based on the analysis of our survey findings, we propose the following recommendations for pharma companies to effectively capitalize on the latest trends that are shaping the HCP engagement framework.

Pharma companies need to invest significantly to improve their content development capabilities

55% of our survey respondents said that they feel overwhelmed by the content they receive from pharma companies. This could be the key reason why, globally, 70% of HCPs feel pharma representatives do not understand their requirement, and 63% HCPs are suggesting that pharma representatives need to share only relevant content with them to make the interactions more insightful. This shows, even though pharma companies have taken the first step towards customer-centricity, they have a long way to go to achieve the ideal customer experience. To get there, it is essential that along with upgrading their capabilities they also enable a sustainable partner network that can accelerate this process for them.

Bridge the gap between HCP preferred channels and channels used by pharma companies to engage them

Our survey revealed that at region and specialty levels, the gaps in channels used and channels preferred are significantly wide for certain countries and specialties. For instance, in the United States, the most commonly used channel was marketing emails (55%), though this tool did not even rank in the top 10 channel preferences of HCPs. Thus, it is important for pharma companies to create a multichannel marketing plan that is HCP-centric, and not the other way round, where channels dictate the engagement level.

HCPs expect pharma companies to use digital channels to give them on-demand access to representatives and content

56% of HCPs said that remote interactions with pharma representatives have increased by over 40% mainly owing to the flexibility to reschedule appointments. They also mentioned that amongst all virtual engagement formats, webinars, and webcasts are their preferences as they are the shortest form of engagement and also can be accessed on-demand at the physician's convenience. The acceptance of these formats indicate that HCPs are employing such formats so that they can effectively use digital channels for the activities that interest them the most, which are learning and development (77%), followed by professional networking activities (68%).

To significantly improve HCP engagement, pharma companies need to consider the regional variations in HCP preferences when it comes to content, channel, device, and time

In the United States, at 79% response rate, content related to efficacy is the most preferred, with 68% of HCPs accessing through computer/laptop and 28% of them stating that 5 pm to 8 pm on weekdays is the best time to share content with them. These are critical granular insights that pharma marketers can incorporate into their existing and upcoming HCP engagement plans to significantly improve the effectiveness of the programs.

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Appendix: Top insights for each region

The United States

1. Pharma companies mainly use marketing emails, websites, and online journals to reach HCPs in the United States. However, HCPs themselves prefer face-to-face discussions, webinars or webcasts, and online journals to receive medical information. Regarding the device preference, the HCPs prefer to consume content over computer/laptop between 5:00 pm and 8:00 pm on weekdays.
2. HCPs in the United States have a higher preference for content on safety, efficacy, and treatment guidelines. They use digital channels for personal learning and development activities, telemedicine practice, and video conferencing for professional networking, and leverage websites such as Medscape, WebMD, and Epocrates to satisfy their content needs.
3. 47% of HCPs in the United States feel overwhelmed to an large extent by content shared by pharma companies. Content formats that overwhelm them the most are product promotional content and emails from pharma sales representatives.
4. 14% of HCPs in United States believe pharma representatives do not understand their requirements completely. They feel representatives can add value by understanding their specific needs and sharing only relevant content at their convenience through their preferred channel. Also, they expect pharma representatives to be accessible on-demand through channels of their choice.

The United Kingdom

1. Pharma companies mainly use emails from representatives, webinars, and websites to reach HCPs in the United Kingdom. HCPs also prefer to access information through webinars and online journals. However, their third channel of preference is websites over emails from representatives. They prefer to consume content between 11:00 am and 2:00 pm on weekdays mainly using their computer/laptop.
2. HCPs in the United Kingdom have a higher preference for content on real-world evidence, safety, and efficacy. They use digital channels for personal learning and development activities, video conferencing for professional networking, and telemedicine practice. The websites they leverage to access content are Sermo, Medscape, and WebMD.
3. 45% of HCPs in the United Kingdom feel overwhelmed to an extent by content shared by pharma companies. Content formats that overwhelm the most are product promotional content and events-related information.
4. 13% of HCPs in the United Kingdom said that pharma representatives do not understand their requirements completely. They see representatives adding value by understanding their specific needs and sharing only relevant content at their convenience through their preferred channels. Also, they expect pharma representatives to be accessible on-demand through channels of their choice.

Germany

1. Emails from representatives, online journals, and offline journals were the main channels used by pharma companies to reach HCPs in Germany. HCPs also prefer to access information through offline and online journals, however, they chose webinars as their third preferred channel over emails from representatives. They prefer to consume content between 5:00 pm and 8:00 pm on weekdays mainly using their computer/laptop.
2. HCPs in Germany have a higher preference for content on treatment guidelines, safety, and efficacy. They use digital channels for personal learning and development activities, video conferencing for professional networking, and remote interactions with pharma companies. Sermo and Medscape are the 2 main websites they use to access content, followed by search engines.
3. 58% of HCPs in Germany feel overwhelmed to an extent by content shared by pharma companies. Content formats that overwhelm the most are product-related promotional content and events-related information.
4. 12% of HCPs in Germany said that pharma representatives do not understand the requirements of HCPs completely. The HCPs see representatives adding value by understanding the specific needs of HCPs and sharing only relevant content at their convenience through their preferred channels. Also, they expect pharma representatives to be accessible on-demand through channels of their choice.

Spain

1. Pharma companies mainly use emails from representatives, webinars, and marketing emails to reach HCPs in Spain. However, face-to-face discussions, emails from the representative, and webinars are among the top 3 preferred channels of HCPs. They prefer to consume content between 5:00 pm and 8:00 pm on weekdays mainly using their computer/laptop.
2. HCPs in Spain have a higher preference for content on Real-World Evidence, treatment guidelines, and efficacy. They use digital channels for personal learning and development activities, video conferencing for professional networking, and remote interactions with pharma companies. The websites they leverage to access content are Sermo, Medscape, and Mayo Clinic.
3. 57% of HCPs in Spain feel overwhelmed to an extent by content shared by pharma companies. Content formats that overwhelm the most are product promotional content and events-related information.
4. Most HCPs in Spain believe that pharma representatives completely understand their expectations. They see representatives adding value by understanding the specific needs of HCPs and sharing only relevant content at their convenience through their preferred channels. Also, they expect pharma representatives should be accessible on-demand through channels of their choice.

France

1. Pharma companies use self-directed web detailing, webinars, and face-to-face discussion channels to reach HCPs in France. HCPs also prefer self-directed web detailing and face-to-face discussions, however, they chose online journals over webinars as their third channel of preference. They prefer to consume content after 8 pm on all weekdays mainly using their computer/laptop.
2. Efficacy, safety, and dosage are their content preferences. They use digital channels for personal learning and development activities, video conferencing for professional networking, and telemedicine practice. The websites they leverage to access content are Sermo and Univadis, followed by search engines.
3. 42% of HCPs in France feel overwhelmed to an extent by content shared by pharma companies. Content formats that overwhelm the most are product promotional information and events-related information.
4. 15% of HCPs in France believe that pharma representatives do not completely understand the expectations of HCPs. They see pharma representatives adding value to their interactions by understanding the specific needs of HCPs and sharing only relevant content at their convenience and by being accessible on-demand through channels of their choice.

Italy

1. Pharma companies mainly use face-to-face discussions, websites, and emails from representatives to reach HCPs in Italy. The top channel preferences of HCPs are face-to-face discussions, online journals, and webinars. They prefer to consume content between 5:00 pm and 8:00 pm on weekdays mainly using their computer/laptop.
2. Efficacy, treatment guidelines, and safety are their content preferences. They use digital channels for personal learning and development activities, video conferencing for professional networking, and remote patient monitoring. The websites they leverage to access content are Sermo and Medscape, followed by search engines.
3. 40% of HCPs in Italy feel overwhelmed to an extent by content shared by pharma companies. Content formats that overwhelm the most are product promotional content and events-related information.
4. HCPs feel pharma representatives can add value to their interactions by offering self-service options and by understanding their specific needs and sharing only relevant content at their convenience.

India

1. Pharma companies mainly use webinars or webcasts, text messaging, and social media to reach HCPs in India. However, channels preferred by HCPs are webinars and webcasts, online journals, and face-to-face discussions. Their preferred time to access content is between 2pm to 5pm on weekdays and after 8pm on weekends.
2. HCPs in India have the highest preference for the contents on safety, treatment guidelines, and Real-World Evidence, and they primarily use digital channels for personal learning and development activities, video conferencing for professional networking, and for telemedicine practice. Medscape, WebMD, and Sermo are the websites they use to access content and network with their peers.
3. A staggering 71% of HCPs in India feel overwhelmed to a certain extent by content shared by pharma companies. Product promotional content and events-related information are the main types of content that are leading to digital fatigue.
4. While only 7% of HCPs believe that pharma representatives do not understand their requirements completely, >55% of HCPs suggested that pharma representatives can significantly improve the quality of interactions by understanding the specific needs of HCPs and sharing only relevant content at their convenience through their preferred channels.

China

1. Webinars and webcasts, face-to-face discussions, and social media are the top 3 channels used by pharma companies in China to reach HCPs. Meanwhile, channel preferences of HCPs are webinars, face-to-face discussions, and online journals. They prefer to consume content over mobile between 5:00 pm and 8:00 pm on weekdays.
2. HCPs in China have a higher preference for contents on safety, efficacy, and treatment guidelines. They use digital channels for personal learning and development activities, video conferencing for professional networking, and for telemedicine practice. They leverage websites such as Sermo and Univadis, followed by search engines to satisfy their content needs.
3. 58% of HCPs feel overwhelmed to an extent by content shared by pharma companies. Content formats that overwhelm the most are product-related promotional content and events-related information.
4. Like India, in China also a very small percentage (5%) of HCPs believe that pharma representatives do not understand the requirements of HCPs completely. According to physicians, pharma representatives can add value to their interactions by understanding the specific needs of HCPs and sharing only relevant content, and being accessible on-demand through channels of their choice.



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