HealthLink® DIMENSIONS

Empowered Healthcare Intelligence

BREAKING THROUGH THE NOISE

How to effectively communicate with healthcare professionals

CONTENTS

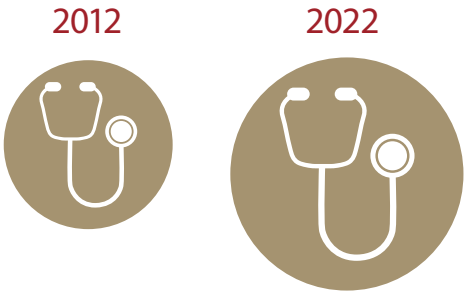
INTRODUCTION

Effective communication hinges on the ability to connect in the most convenient and efficient ways. This is especially important as pharmaceutical companies, insurance payors and businesses in the medical device industry attempt to foster a more open dialogue with medical professionals. Communicating with physicians requires flexibility and adaptability to effectively meet expectations and preferences.

The healthcare industry evolves quickly. Regulations are introduced and amended that can profoundly influence the choices physicians and other professionals in the medical industry make when establishing or nurturing relationships with suppliers and payors.

Demographic and employment shifts in the medical community are also influencing the ways physicians want to communicate. For instance, retail pharmacies are playing a bigger role in tackling a number of healthcare issues, including the expanded services provided in these locations. Many of them are staffed by registered nurses and pharmacists who increasingly wear a greater number of hats to deliver services. Between 2007 and 2011, the number of pharmacists trained and licensed to vaccinate the public jumped from 40,000 to 150,000.[1] They also perform annual physical exams for students entering various levels of education and medication management services.[2] What's more, 81 percent of consumers' first response to a minor ailment is to use over-the-counter medication.[3]

Between 2007 and 2011, the number of pharmacists trained and licensed to vaccinate the public jumped from 40,000 to 150,000.[1]



According to the Bureau of Labor Statistics, the employment market for PAs is expected to grow 38 percent between 2012 and 2022.[4]

As a result, physicians are increasingly focused on providing care for more complicated issues. Physician assistants are a more visible medical professional segment that carries more responsibility as integral members of a physician's practice and team. According to the Bureau of Labor Statistics, the employment market for PAs is expected to grow 38 percent between 2012 and 2022.[4] With the ability to examine, diagnose and treat patients, they're another voice that pharmaceutical organizations and medical device makers need to take into account when developing marketing strategies.

While physicians are able to spread out their workload to a certain extent, the fact that they're handling more complex cases means they have to devote additional time to addressing the issues facing these at-risk patients. For instance, family physicians and general practitioners are seeing an average of 89 patients per week this year, which is 10 patients fewer than in 2013, according to the 2014 "Medical Economics Physician Practice Study."[5] However, the average workweek is still around 51 hours. Paired with a significant amount of administrative work, the end result is 81 percent of physicians feel over-extended, according to The Physician Foundation.

The communication challenge

81%
of physicians feel over-extended

Physicians are working long hours and, therefore, have less time to engage industry representatives. How do pharmaceutical enterprises, insurance payors and medical device manufacturers nurture relationships with healthcare providers? What are the most effective channels to reach physicians? Are medical professionals influencing each other through social channels? How can medical and pharmaceutical suppliers exert an influence without intruding on physicians' limited time?

Physicians want access to information on demand and on a consistent basis. Direct marketing strategies remain the most agile, effective and sought-after ways to communicate with physicians and others in the healthcare industry.

A recent study conducted by HealthLink Dimensions asked physicians and nurse practitioners about their preferred communication methods. The 200 respondents included professionals specializing in internal medicine, general surgery, cardiology, obstetrics and gynecology, and family practice, as well as dental professionals. This survey is a broad look at healthcare providers' communication behaviors. As physicians' means and preferences of communicating change, healthcare marketers' methods must evolve along with them.

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COMMUNICATION PREFERENCES

Marketers in the healthcare industry can't afford to develop and roll out a communications strategy based on gut feelings or hearsay. They need hard data and evidence to drive effective campaigns. The preferences expressed by physicians and nurse practitioners provide keen insight into the different channels marketers can use to deliver their educational and promotional messages.

Continuing the trend from last year's survey, email is the most preferred communication channel. In fact, nearly 67 percent of respondents indicated they favor this method for industry news, product updates and announcements, as well as research and educational opportunities. Surprisingly though, the second most preferred channel is a face-to-face visit from a company representative, at roughly 13 percent, surpassing direct mail, which a little more than 9 percent of physicians and nurse practitioners said they favored. Dental professionals expressed more enthusiasm for direct mail, as 30 percent said they preferred this channel compared to more than 60 percent who are partial to email.

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What doesn't work as well? Fewer than 2 percent said they'd like to hear from medical device makers and pharmaceutical companies over the phone, and about 2 percent using a fax machine. Marketers should steer clear of social media promotions, as less than 1 percent of medical professionals indicated they preferred this method. Meanwhile, professional conferences perform a little better, with more than 7.5 percent of healthcare workers favoring this kind of marketing event.

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Not all types of information are equally relevant

Because of the nature of physicians' work and priorities on a daily basis, the more information and the greater value marketing communications can provide, the more receptive these professionals are. For instance, nearly 8 out of 10 respondents said they prefer to get continuing medical education program information from companies in the pharmaceutical and medical device manufacturing industries. This kind of marketing communications introduces a customer-centric perspective that injects value into a branded message. Instead of heavily product-oriented messages, CME program information is a great way for marketers to align themselves with valuable information and establish their authority.

8 out of 10 respondents said they prefer to get continuing medical education program information from companies in the pharmaceutical and medical device manufacturing industries.

Building off this idea, more than 57 percent of physicians responded that they value patient education materials. In light of the fact that these medical professionals are busy examining, diagnosing and treating patients, any supplemental materials that can help explain medication or medical devices to those seeking treatment is a value-added resource. These materials provide physicians with a resource they can use to talk patients through their options. Other information sought after by more than half of respondents pertains to product approvals and prescription updates.

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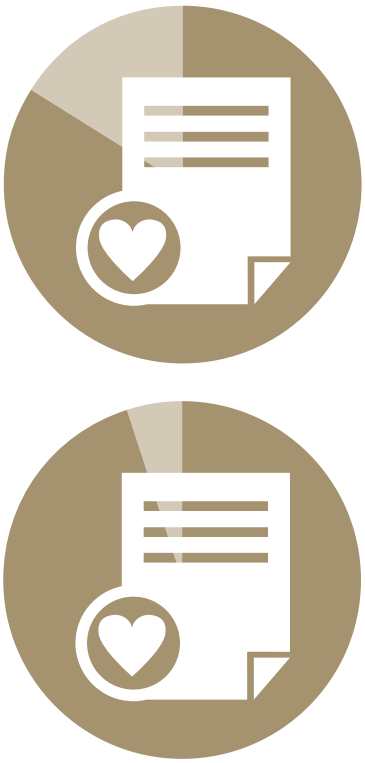
It's rare that medical professionals don't want to receive information and wish to take on researching products by themselves. This presents marketers with clear opportunities to engage physicians and nurse practitioners as they consider new purchases and partnerships.

SUPPORT PATIENT COMMUNICATIONS

As previously mentioned, medical professionals put a premium on educational materials that facilitate patient knowledge. Physicians were asked if they utilize patient education and support materials provided by healthcare companies and patient advocacy organizations. The overwhelming majority—more than 84 percent—indicated they did so, and 95 percent of dental professionals said the same. However, there are definite nuances regarding what types of patient materials physicians deem most necessary.

The most in-demand resource is educational references that discuss disease state information. Because disease research and treatments is often evolving, patients can get mixed messages from multiple sources. Physicians want to instill confidence in their patients and often rely on accurate and effective disease state education materials provided by life sciences organizations. At the same time, another in-need type of patient support is prescription and medical device education materials. Dental professionals place nearly an equal weight on dental educational resources and patient-oriented information regarding dental disease. These data points highlight a significant opportunity for marketers in related industries because there's a demonstrated need among medical professionals to continue providing insights into their products and services, especially as they benefit the patient population.



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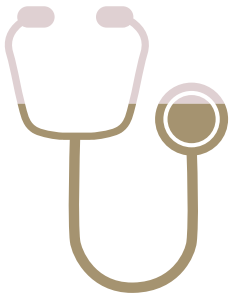
To meet this demand, most physicians and nurse practitioners favor printed materials provided in their offices. In spite of the digital revolution in many other areas of marketing, a tangible paper-based reference is valuable because it can be accessed immediately and patients can take the information out of the office. However, product-sponsored and non-sponsored websites are steadily gaining ground in terms of preference. Since a large segment of the public has a cellphone or smartphone that has Internet access, Web-based resources are increasingly convenient to provide patients with information and updates. That being said, few medical professionals expressed interest in integrating interactive tablet devices in their offices.

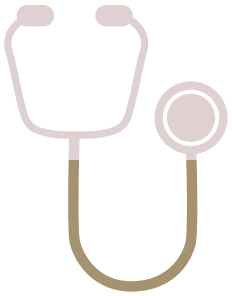
Marketers should evaluate their current print direct marketing materials and prioritize educational and informative messages that physicians can rely on to improve patient knowledge.

DIGITAL BEHAVIORS

Refer to WebMD



Refer to Medical Journal Websites



Although healthcare professionals continue to seek out educational marketing materials from industry sources, there's also a substantial segment of their medical community that takes it upon itself to research healthcare products, medical devices and disease state knowledge. The majority—more than two-thirds—of physicians refer to WebMD as a trusted resource for information, while almost 46 percent rely on a medical journal website. A slightly lower percentage of medical professionals depend on a medical association website that caters to their particular specialty, while ePocrates rates highly as a source of information.

On the other hand, only 13 percent of physicians and nurse practitioners reference the American Medical Association's website for online information. Meanwhile, one-quarter of respondents said they most commonly search manufacturers' product sites.

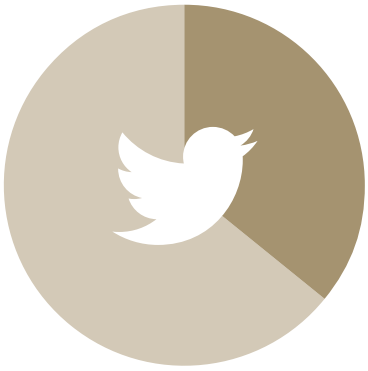
An increasingly popular resource for healthcare professionals is UpToDate, a website hosting evidence-based research and clinical resources to help physicians and clinicians make sound decisions. The subscription service provides access to current, original studies performed by other physicians. It also has a mobile app that medical professionals can use on the go.

Getting social?

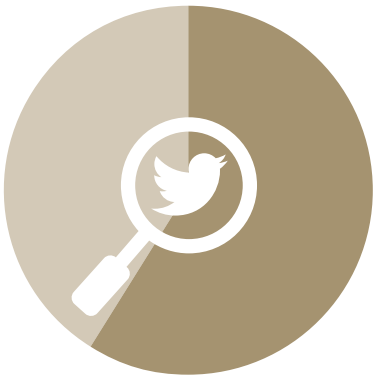
In contrast with last year's study, a growing number of physicians are engaging with social media. In fact, nearly 36 percent indicated they use social networks to communicate with other physicians and healthcare professionals. Still, more than 57 percent of physicians don't use social networks at all. And an increasingly small number use social platforms to connect with patients or pharmaceutical and medical device companies—4 percent and 3 percent, respectively. Meanwhile, dental professionals rarely use social networks to connect with each other or patients. In fact, 80 percent don't access social media at all for professional purposes.

Which networks are the most frequently used? Continuing trends highlighted last year, Sermo, Twitter, Facebook and LinkedIn are the most popular social media sites physicians use to connect with each other. While most medical professionals aren't using social media, many express interest in exploring it in the future. For instance, close to 59 percent indicated they see value in social networks and plan to participate in this digital resource. Fewer than half of dental professionals claimed the same.

As acceptance grows, pharmaceutical and medical device manufacturers can begin thinking of ways to leverage social sites to promote educational and marketing campaigns. As a younger physician demographic takes over from their elder counterparts who are reaching retirement age, social media adoption may come sooner than later.



36 percent indicated they use social networks to communicate with other physicians and healthcare professionals.



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A MESSAGE TO THE INSURANCE INDUSTRY

One of the most compelling data points highlighted in 2013's survey was the significant missed opportunity that insurance organizations had in keeping in close contact with healthcare professionals.

In 2014, insurance payors still haven't made progress in communicating with physicians, as just 27 percent of respondents said they felt they receive adequate communications from insurance carriers, PPO networks and Pharmacy Benefits Managers. Roughly equal numbers—around 36 and 37 percent respectively—of physicians indicate they feel payors could provide more timely updates or rarely hear from insurance providers at all.

Going further, physicians remain largely dissatisfied in relation to communications regarding insurance networks updates, including reimbursement fee schedules, procedures for claims processing, drug formulary coverage and co-pay schedules and physician members within their referral network.

Considering more than half of all medical professionals want to hear from their health insurance networks via email, there's a significant marketing opportunity. In combination with keeping medical professional updated to any changes in the networks, insurance providers should take advantage of the channel to build their brand as a trusted resource.

Meanwhile, the Centers for Medicare and Medicaid Services Open Payments program continues to cause ripples in the healthcare industry. Serendipitously, it can help pharmaceutical firms and medical device makers open up a conversation with physicians. The vast majority—more than 77 percent—of respondents said they would prefer to receive a notification from the manufacturer with the reported data if a manufacturer reports financial spend information about you to the CMS. In most cases, email is the preferred method for this kind of communication, with direct mail as the second choice among medical professionals. The opportunities for growth in healthcare marketing are apparent.

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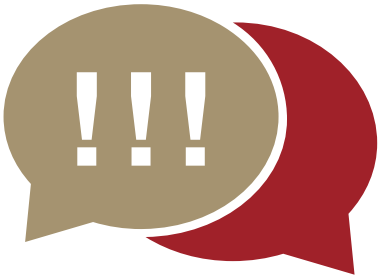

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CONNECTING WITH MEDICAL PROFESSIONALS

Medical professionals continue to seek out more, better, up-to-date and accurate information that will help them build a more functional practice and develop their own continuing education as well. In large part, physicians and nurse practitioners want to be able to access communications and marketing collateral on-demand, as the need arises, whether that's through email or paper-based educational materials.

Because the healthcare industry is changing, pharmaceutical companies, insurance payors and medical device manufacturers need to keep up with shifting communication trends. Evolving physician demographics is making social media a more attractive option as an interactive tool. Meanwhile, new online resources beyond WebMd, such as UpToDate, are increasingly popular for physicians who want access to evidence-based resources.

With this in mind, a number of new channels are opening up that marketers can and should take advantage of not only to encourage brand awareness but also actively forge relationships with healthcare providers.

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[1] http://www.npr.org/blogs/health/2011/10/10/141153165/pharmacies-inject-convenience-into-flu-shot-market

[2]http://www.pm360online.com/the-pharmacys-new-role-in-providing-healthcare-services/

[3]http://www.yourhealthathand.org/images/uploads/CHPA_YHH_Survey_062011.pdf

[4]http://www.bls.gov/ooh/healthcare/physician-assistants.htm

[5]http://medicaleconomics.modernmedicine.com/medical-economics/news/why-primary-care-physicians-are-seeing-fewer-patients?page=full