

Medicine on the Move

Digital Defines
Healthcare Marketing in

2019



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Introduction

Welcome to HealthLink Dimensions' 2019 HCP Communication Survey report, our annual industry overview that helps pharmaceutical, medical device, biotech, and healthcare marketing organizations with the insights they need to build accurate, targeted campaigns that influence healthcare purchasers. This latest survey reveals that digital tools continue to grow in importance for healthcare marketing.

Here are the key takeaways:

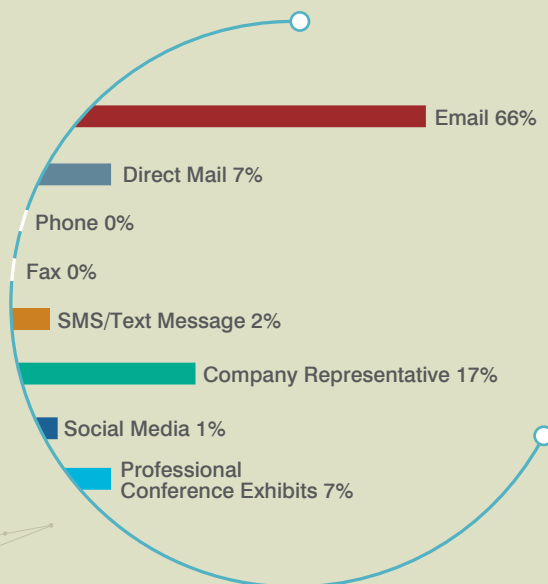
- Email remains the preferred means for healthcare professionals to receive information. However, subtle shifts in this landscape indicate that multimodal digital outreach and programmatic campaigns increasingly will deliver results from now into the immediate future
- The quality and context of the information provided as part of marketing outreach efforts will drive success for healthcare provider marketing in 2019

In short, our respondents indicate that a mixture of digital marketing channels, tailored to the specific preferences of target healthcare providers, is most likely to improve engagement. Email remains important, but smart marketers need to evolve to broader digital marketing platforms and data-driven audience targeting to increase campaign effectiveness.

Now, let's dive into the data.

Email Remains King

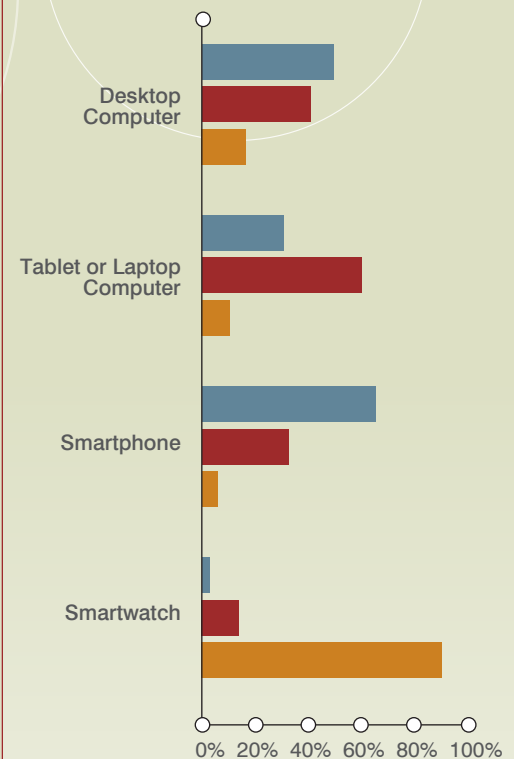
Healthcare providers prefer email outreach over other approaches – by more than seven times over the second most-favored approach (direct mail). This result appears to be driven by a need to balance speed, convenience, accessibility, and availability.



Preferred method of communication

But Email Consumption Rapidly Changed

Most used device to read email



- Primary device for reading email
- Sometimes used for reading email
- Rarely or never used for reading email

For the first time, healthcare professionals indicate that they prefer mobile email via smartphone as their preferred method of marketing communications. This change represents a rapid and substantial difference from previous surveys, reflecting a significant advantage for smartphone email over desktop computers, laptops, or tablets.

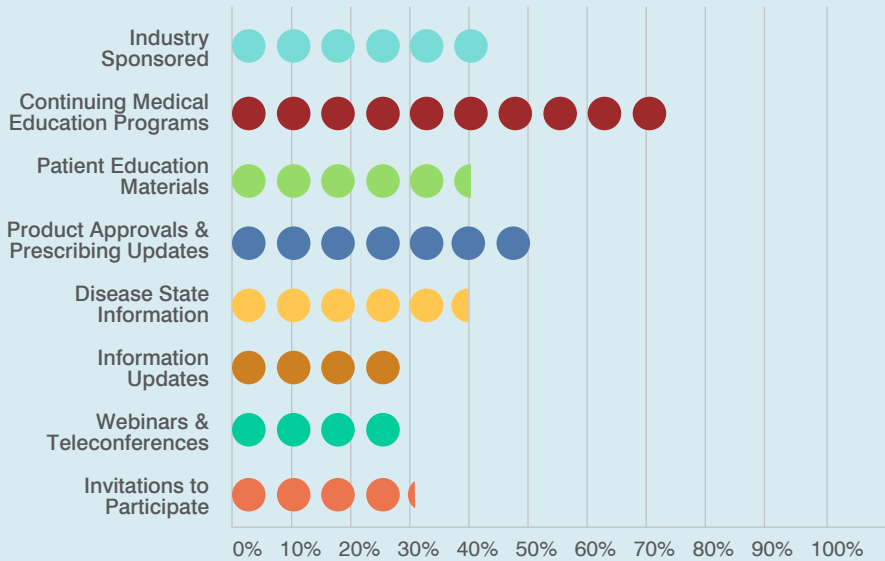
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The speed with which mobile achieved dominance indicates that this trend will continue to increase over time. Healthcare marketers must respond by emphasizing responsive design and mobile optimization as a crucial component of email outreach. Doing so lays the groundwork for mobile integrated email/ programmatic campaigns that guide potential purchasers to apps and mobile-friendly web sites, all within a seamless, intuitive customer experience.

Providers Want Product and Service Education

While healthcare providers indicate a desire to control access, they also want to be better informed on new products and services. This trend is particularly important for pharmaceutical and medical device marketing programs.

Information preferred to receive from Pharmaceutical and Medical Device manufacturers



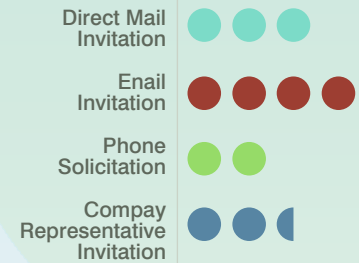
“Product approvals and prescribing updates” increased dramatically in importance over previous years, indicating that healthcare professionals desire timely information and education beyond CME programs and patient support materials. Popular topics include:

- Product approvals
- Industry-sponsored webinars
- Disease state information
- General healthcare industry updates

Webinars, Teleconferences, and Educational Events Must Be Easy to Access

Healthcare professionals desire more educational and informational opportunities, but they want registration to be as frictionless as possible. This trend aligns well with the move toward mobile email and programmatic engagement.

Invitations most likely to get a response

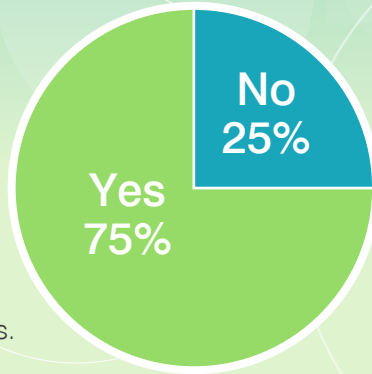


From email to app to browser, customer experience will drive email and programmatic success. Providers want consumer-level convenience in which information access or event registration is both intuitive and fast. This experience must be seamless and consistent across multiple modalities to be effective, especially for mobile systems.

Patient Education and Support Remain Important

Healthcare professionals continue to express a strong preference for patient education and support materials provided by manufacturers, especially pharmaceutical and medical device organizations. Providers want this information to be readily available for their patients, but they do not want the responsibility or expense of creating these materials themselves.

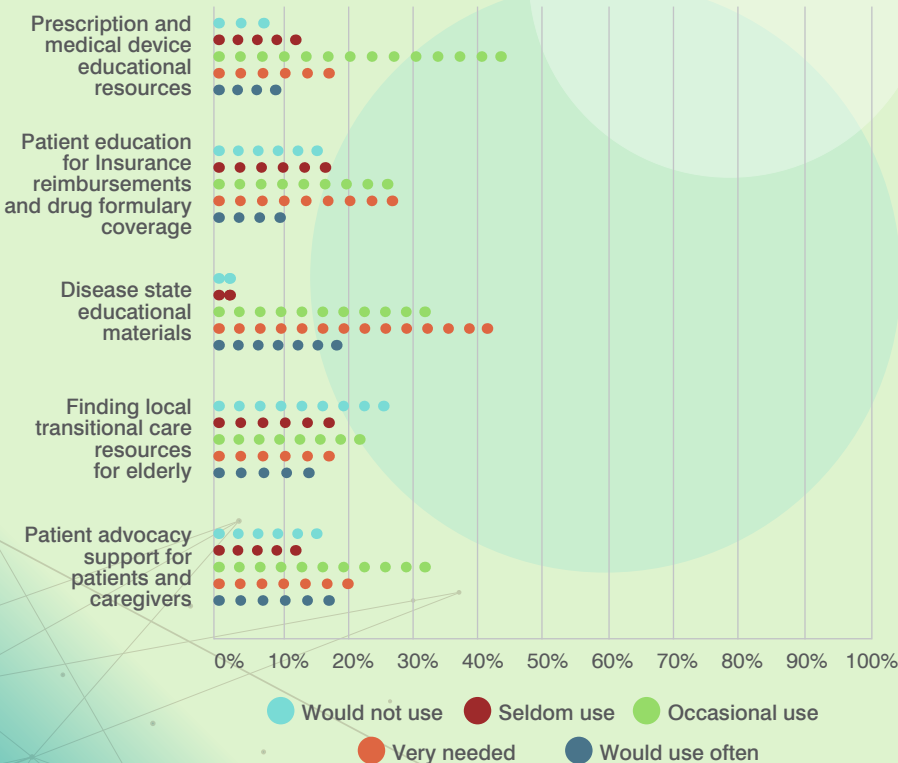
Utilized patient education and support materials



Quality, clarity, and presentation of patient education materials across multiple devices and forms of consumption will create essential differentiation opportunities for healthcare marketers. The content areas most likely to interest providers include:

- Disease state information
- Prescription and medical device education
- Patient advocacy

Support most needed for your practice



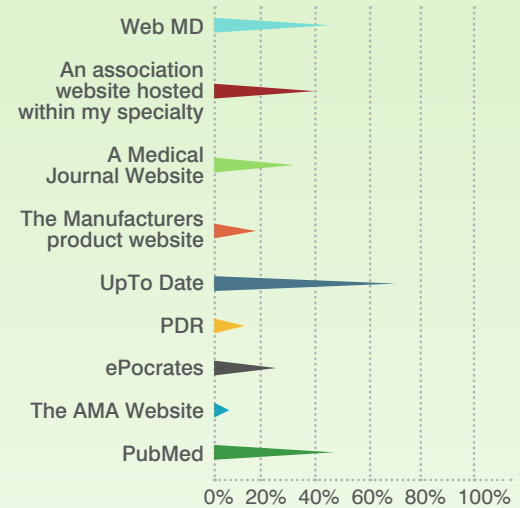
Providers Research the Internet, Just Like the Rest of us

To no one's surprise, healthcare professionals rely on the internet to find answers.

Typical sites include:

- UpToDate
- Specialty associations
- Medical journals
- Product manufacturers
- WebMD

Websites most commonly utilized

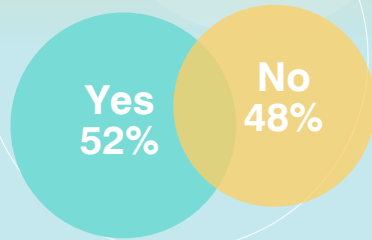


These sites tend towards the technical, with WebMD as the one consumer-oriented site listed in this survey. These sites present obvious targets for programmatic marketing and co-marketing campaigns.

Social Media Isn't Popular... Yet

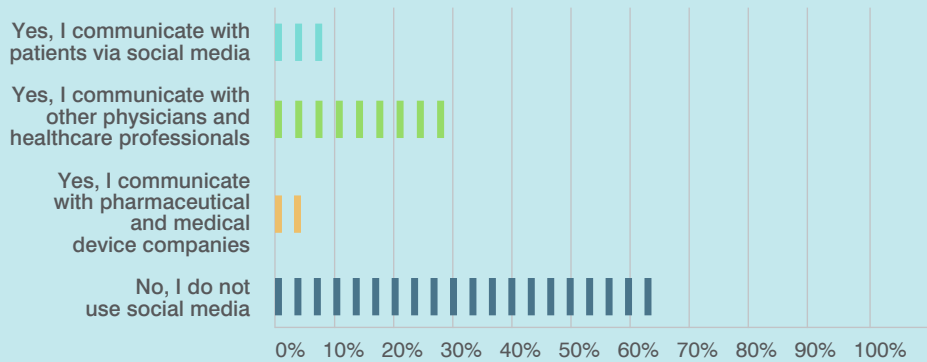
Healthcare providers overwhelmingly avoid social networking sites for professional purposes. While the exact reasons remain unclear, concerns about HIPAA complications and potential legal liability may contribute. Direct uncompensated personal access might also be a factor behind social media avoidance.

Do you see value in social media and plan to participate in the future?



At the same time, providers see value in social media by a slim margin and plan to participate in the future. This trend reflects something for marketers to watch as 2019 progresses.

Websites most commonly utilized



Digital Advertising Works, But It Depends on Time and Location

Physician workloads and administrative duties continue to increase while physician access decreases. These growing distractions from patient care leave healthcare providers more pressed for time than ever before. For healthcare marketers, healthcare professionals are increasingly challenging to reach during working hours. Other means of approaching these influencers, such as programmatic advertising, will become increasingly essential for reaching this audience.

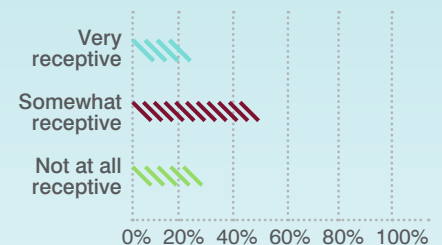
Yes 92%

No 8%

Do you consume professional information (articles, journals, videos, etc.) when you are not at work?

76% of healthcare professionals stated that they are "somewhat receptive" or "very receptive" to digital advertising from pharmaceutical, medical device, and other healthcare vendor organizations. These results correspond with providers' willingness to consume professional information outside the office and represent an opportunity to expand HCP programmatic display marketing beyond endemic channels and partnerships.

How receptive are you in the form of digital advertising from pharmaceutical, medical device, or other healthcare organizations?



This year's research, taken as a whole, indicates that the opportunity to broaden reach and exposure using digital advertising should provide both risk and reward. Context is essential for overcoming provider concerns. Healthcare professionals seem open to healthcare ads on specific types of websites, primarily for targeted, timely, and relevant content. Quality of information and ease of consumption will be critical for capturing attention and driving engagement with advertising content.

About the 2019 HealthLink Dimensions HCP Communication Survey

This year's survey polled 291 physicians, nurse practitioners, and physician assistants. Practice areas included Family Practice, Pediatrics, Internal Medicine, General Surgery, Obstetrics & Gynecology, Dermatology, Cardiology, Oncology, Neurology, Podiatry, Epidemiology, Gastroenterology, Hematology, Nephrology, Urology, Rheumatology, and Otolaryngology.

About HealthLink Dimensions

HealthLink Dimensions is the authority on US healthcare provider marketing data providing data solutions to healthcare and life science organizations to improve master data management, compliance, and marketing initiatives. Leveraging the largest multi-sourced database of active practicing healthcare professionals, HealthLink Dimensions develops customized data solutions to help clients reach their target audience, enrich their business data, optimize claims processing, meet compliance requirements and solve master data quality problems.



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