Healthlink DIMENSIONS

This Was the **Year That Was**

How HCP Communications Adjusted During the COVID Pandemic

Introduction

2021 was the year for providers – challenging, exhausting, demanding. As never before, healthcare providers and health systems faced unprecedented strains, which will force healthcare marketers to adjust to a stressed target market in 2022.

Whether in response to COVID or governmental mandates such as the No Surprises Act, quality information on treatment, policy, and procedure remain at the forefront for providers. Marketing outreach required adjustment to reach providers when and where they preferred, with recipients desiring control over when to read information from trusted relationships.

Here are the key takeaways:

- Whether based in hospitals, offices, or other healthcare facilities, email remains the method providers most clearly prefer for outreach.
- Education became a paramount concern, encompassing educational events, continuing education, disease state information, and patient education.
- Outreach methods most likely to generate a response continue to evolve, with methods beyond email (such as direct mail, phone calls, and virtual meetings/webinars) gaining a more equal footing with email.

In previous years, our survey revealed that message fatigue limited HCP marketing effectiveness. This year, physical fatigue and burnout became significantly limiting factors. Marketers need to recognize that information from trusted medical and regulatory resources is the primary concern for HCP audiences. Providers seek specific information for narrowly focused needs, which means that social media is less important than education, treatment guidance, and peer support.

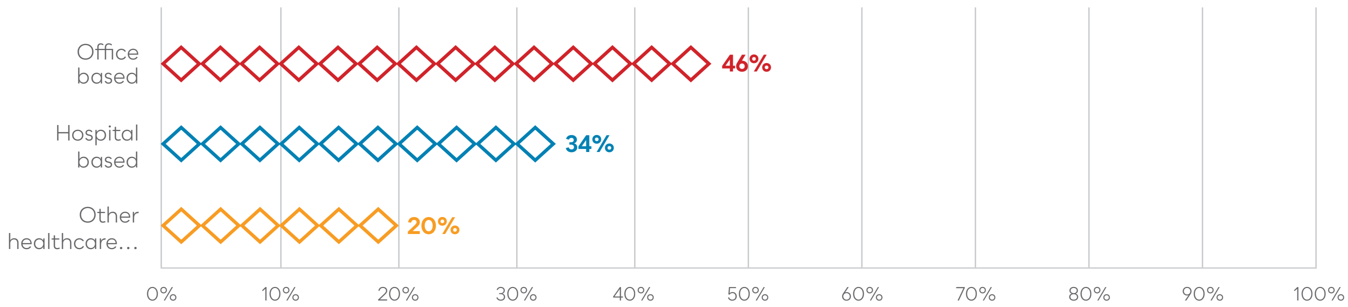
In short, HCP communications and marketing in 2022 will rely on building trust to be successful. Programs that establish that confidence through high-quality deliverables and usable information are the most likely to drive success.

Let's look at the numbers.

Most Respondents Practice in Offices or Hospitals

In past surveys, respondents from office-based practices outnumbered hospital-based settings by a 2 to 1 margin. This year, that preference shrank dramatically, with other healthcare facilities now representing 20% of the total.

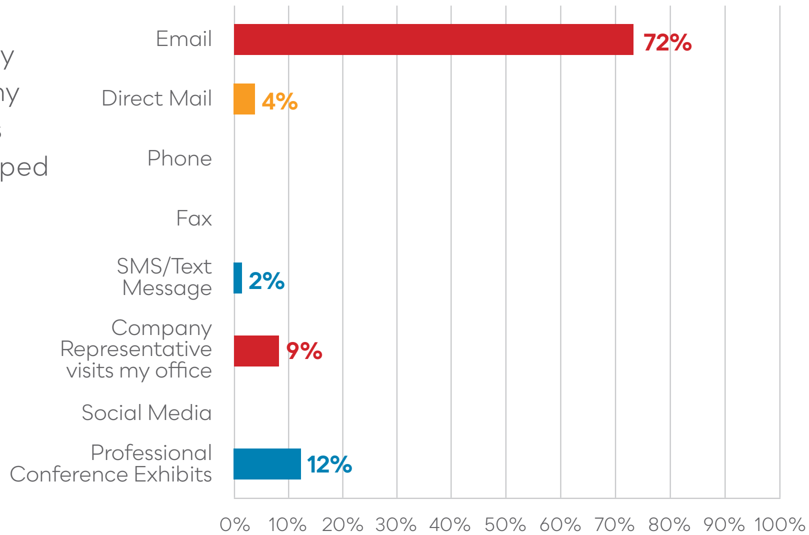
Q1 What is your primary practice setting?



Providers Overwhelmingly Prefer Email for Outreach

Almost three-quarters of respondents indicated that they want to be reached by email for industry communications. One interesting aside – company representative visits and professional conferences were the next most popular, although neither topped 12.5%. These categories require face-to-face interactions, which were severely limited during the pandemic.

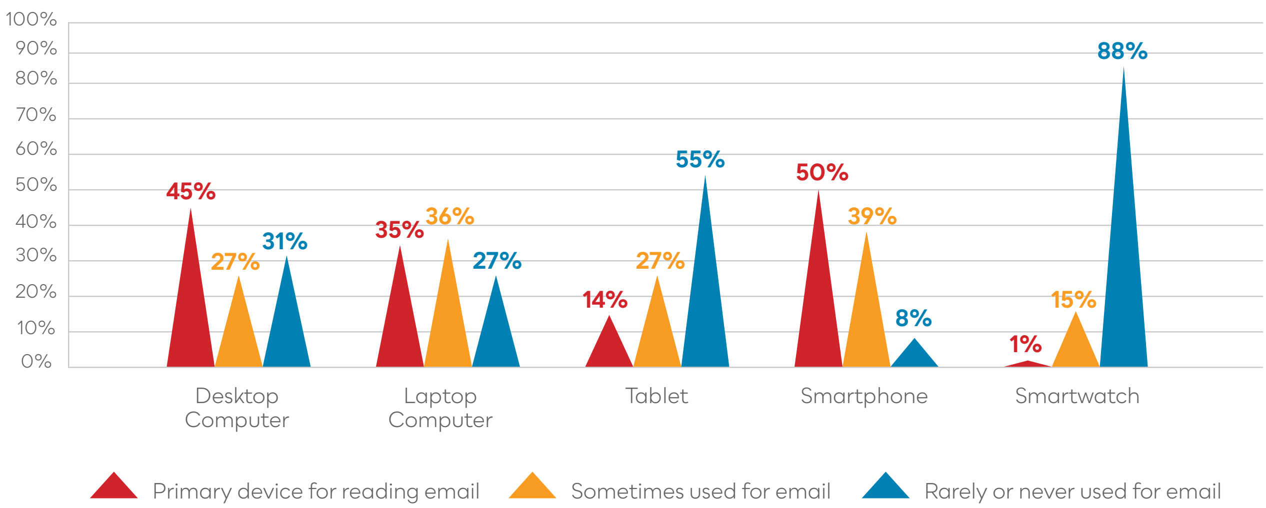
Q3: Which method to the right is your preferred method of communication from industry (Pharmaceutical, Medical Device, Healthcare Insurance) to inform you of industry news, product updates and announcements, or research and educational opportunities?



Smartphones Reign Supreme

For the first time, providers use smartphones as their primary device to read email. Laptop and desktop computers combined still generate a larger composite score, but neither surpasses smartphones on its own. Tablets trail by a considerable margin, and very few providers read email on a smartwatch.

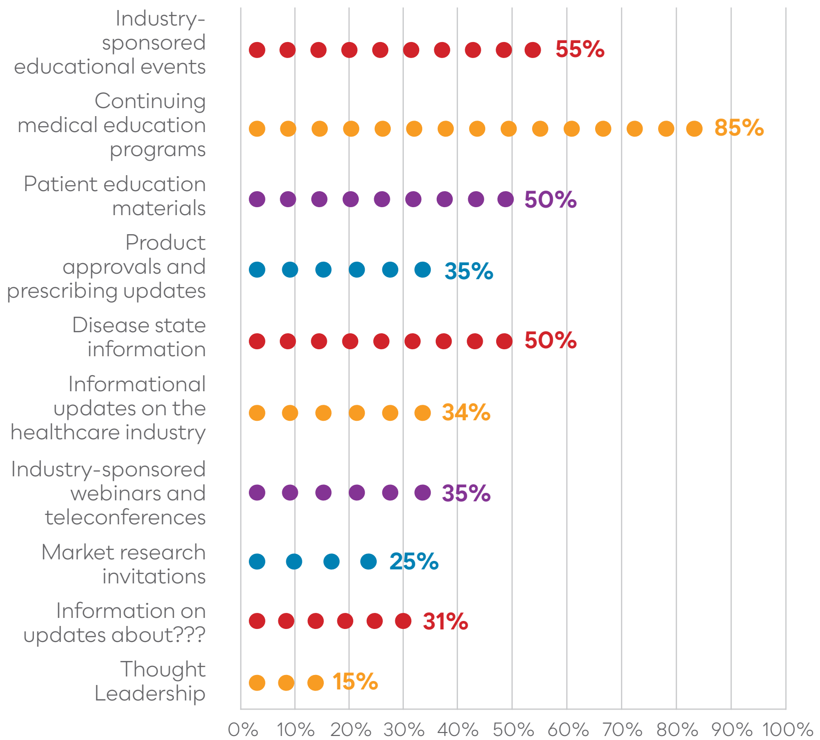
Q4: Which devices do you use to read email? Please rank each device according to use.



Marketers Need to Deliver Treatment-Oriented Information

Continuing education remains the paramount information providers want from pharmaceutical and medical device manufacturers. That said, every category focused on provider education, patient education, and disease state information reached 50% on this question. Relatively generic information lagged significantly.

Q5: What type of information do you prefer to receive from Pharmaceutical and Medical Device manufacturers? Select all that apply:



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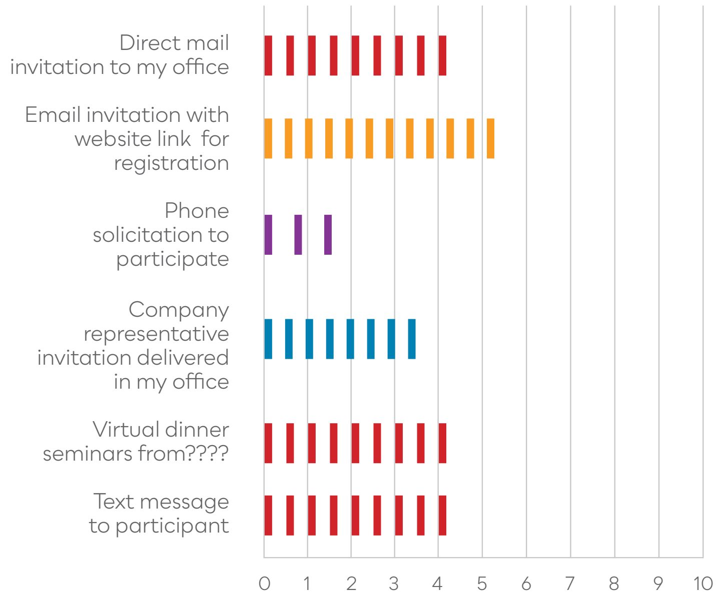
Send An Email Invitation If You Want to Meet

Providers overwhelmingly prefer to receive email invitations with a registration link for webinars, teleconferences, or education events. Direct mail sent to their office comes in a distant second.

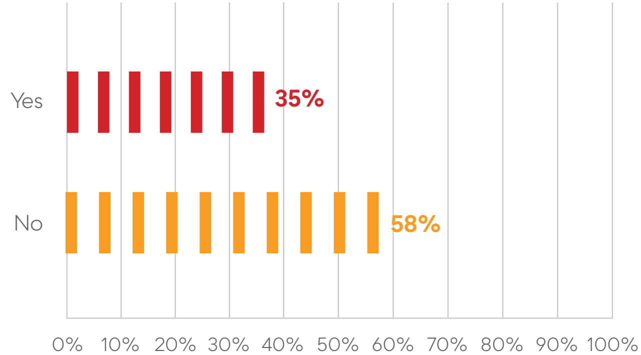
Q6: Which type of invitations for webinar, teleconference, or educational events are you most likely to read and respond to? Please rank from 1- Most likely to respond to 4- Least likely to respond.



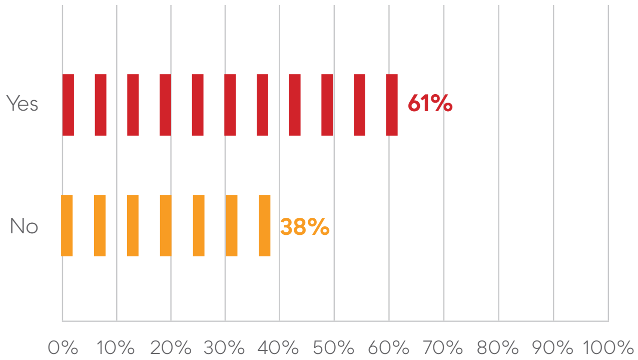
Wait Until After COVID for In-Office Meetings

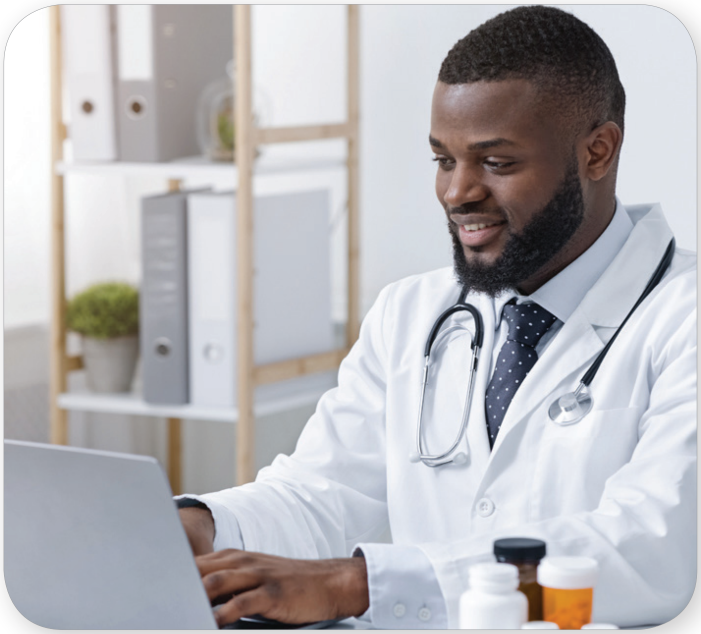
Not surprisingly, providers do not want representatives to visit offices in person. However, that majority is not as large as one might suppose. Most providers anticipate loosening their visitation policies as COVID restrictions ease.

Q7: In light of COVID-19, are you allowing medical sales representatives to physically visit your office?



Q8: Do you expect your visitation policy for medical sales representatives to change as national COVID restrictions are eased?

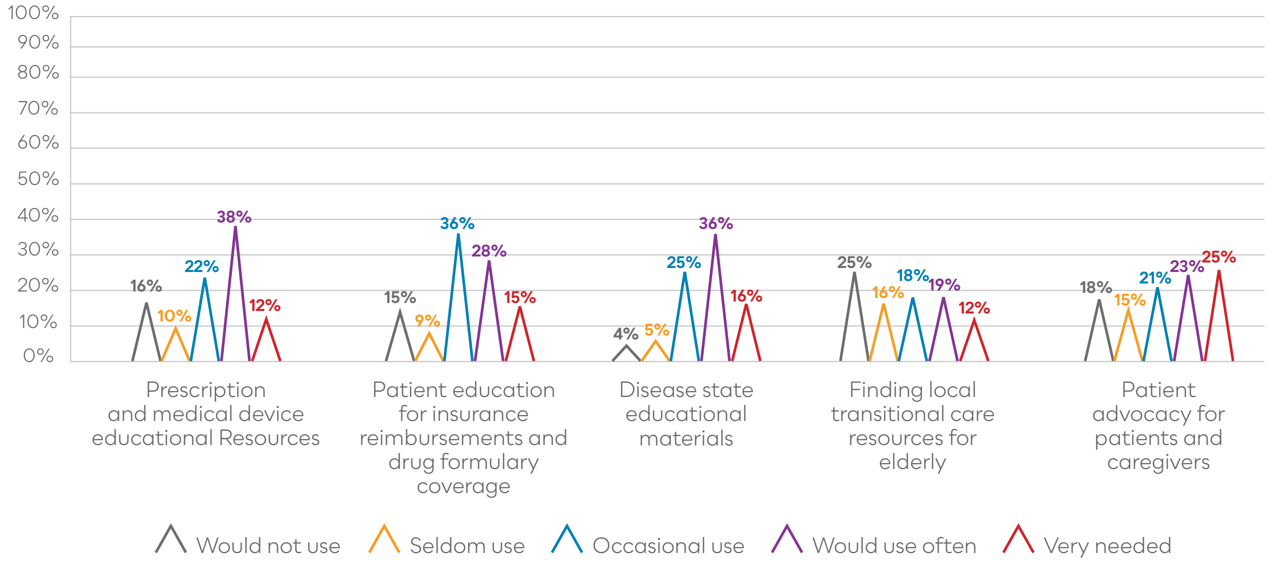




Demand Exists for a Broad Range of Patient Support Materials

Patients ask questions, and providers recognize the value of having patient support materials at hand. As a result, almost all categories received significant votes, with local transitional care for the elderly leading the way. At the opposite end of the scale, only disease state or educational materials scored lower than 10% in usefulness.

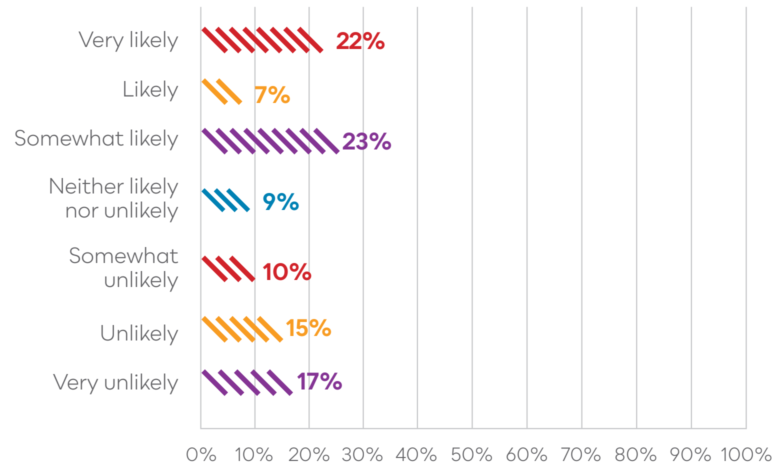
Q9: Please rate the following types of patient support in terms of how useful they are for your practice.



Providers Recognize that Patients Live Mobile Lives

More than half of the providers who responded said they are very likely, likely, or somewhat likely to use mobile technology such as an app to distribute patient support and education information. This finding indicates that providers recognize that patients almost always have smartphones at hand and increasingly look to these devices as a primary means of communication.

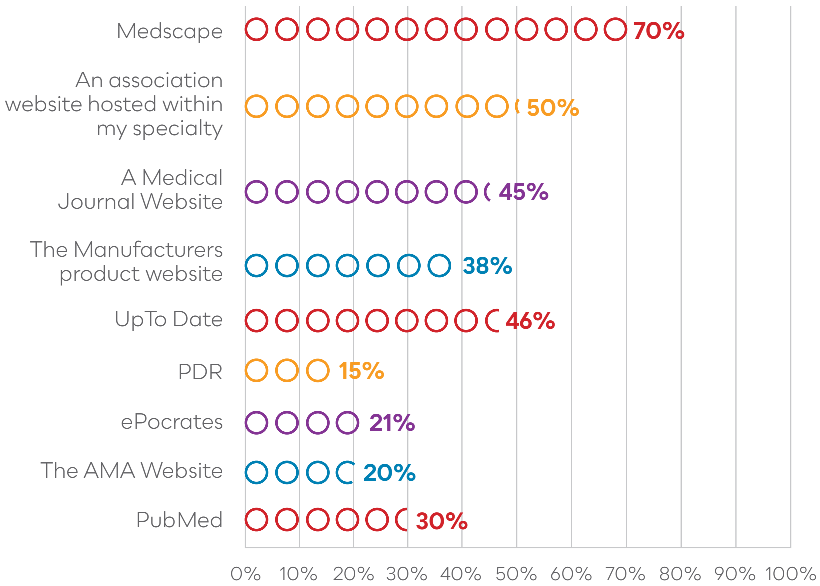
Q10: How likely are you to use mobile technology (such as a mobile app) to distribute patient support information and education?



Provider Trust and Skepticism Extends to Online Medical Information

Only two online resources scored over 50% for respondents who seek information on healthcare products, medical devices, or disease state knowledge. Medscape is the clear leader, with specialty association websites coming in second. Surprisingly, neither the PDR nor the AMA website placed highly in this category.

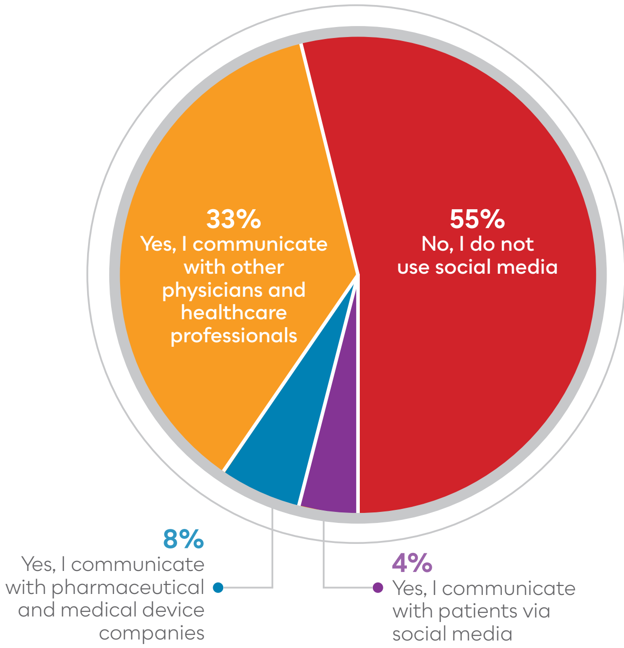
Q11: **When seeking online information related to healthcare products, medical devices, or disease state knowledge, which websites do you most commonly visit? Select all that apply:**



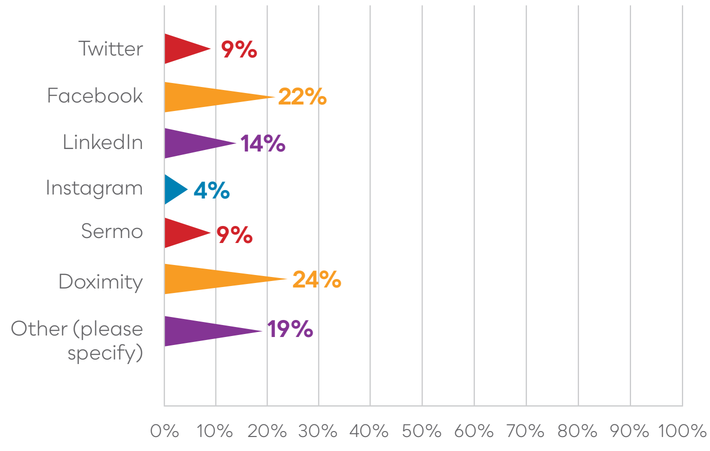
Social Media – Not a Fan

More than half of providers do not use social networking sites for professional purposes. Of those who do, the primary value comes from interactions with other providers. Facebook and Doximity are the professional social networks of choice.

Q12: Do you participate in social networking sites for professional purposes?



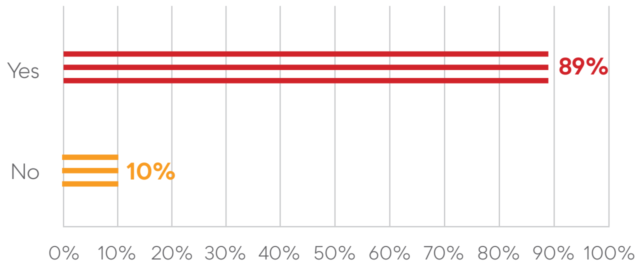
Q13: Which social or professional networks do you actively participate in?



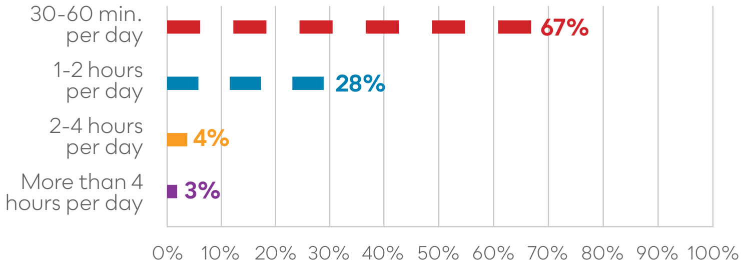
Professional Information Away from the Office – Very Much a Fan

Off-hours learning remains very important for providers – overwhelmingly so. Almost 90% of respondents consume articles, journals, and videos when not in the office. Most providers spend 30-60 minutes out of their very busy days pursuing these activities.

Q16: Do you consume information related to your profession (articles, journals, videos, etc.) when you are not at work?



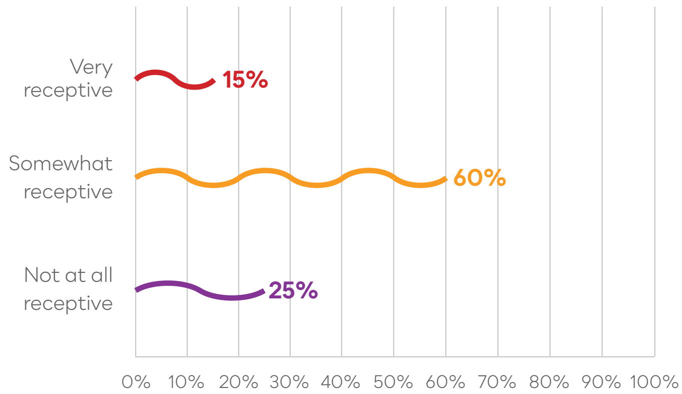
Q17: If you consume professional information when you are not at work, how much time do you spend on average?



A Mixed Reception for Digital Advertising

The good news is that providers recognize some value in healthcare marketing outreach via digital advertising. However, only 15% are very receptive, with the vast majority of providers describing themselves as only somewhat receptive.

Q18: How receptive are you to professional content in the form of digital advertising from pharmaceutical, medical device, or other healthcare organizations?



Providers Remain Dedicated to Their Profession and Their Practices

Our final question asked providers if COVID affected their desire to change jobs. The loud-and-clear answer? No, with almost 75% stating that the pandemic either hasn't affected them one way or the other – or actually decreased their desire for a change. This metric bears watching as the pandemic ends to measure its potential impact on HCP recruiting.

Overall, dedication to healthcare and the rewards of helping heal patients worked to carry providers past the pandemic's challenges. One respondent left retirement specifically to serve the community in the fight against COVID. Other respondents indicated that telehealth and work-from-home became career enhancements. Of those expressing a decrease in satisfaction, reasons for distress included work volume combined with staffing challenges, approaching retirement, and frustration with office policy surrounding COVID containment measures.

About the 2022 HealthLink Dimensions HCP Communication Survey

This year's survey polled physicians, nurse practitioners, and physician assistants. Practice areas include Family, Pediatrics and Adolescence, Internal Medicine, Immunology, Sports Medicine, Obstetrics & Gynecology, Rheumatology, Cardiology, Pulmonary Critical Care, Endocrinology, Nephrology, Oncology, Optometry, Geriatrics, Psychiatry, Hematopathology, Critical Care, Neurology, Radiology, Hepatology, Infectious Diseases, Allergy, Anesthesia, Addiction, and Surgery.

About HealthLink Dimensions

HealthLink Dimensions is the authority in healthcare provider data serving hospitals, life sciences, and health insurers. We offer managed data services and enterprise engagement solutions built on the largest multi-sourced, audited provider email, demographic, and facility database available.

- **5.2M** active providers
- Secured from **500+ sources**, processed through our proprietary algorithms
- Continuously **cleansed and verified** by our Provider Research Center team
- **95%** of US providers, including **95%** with digital identities

Who We Are:

- Exclusively focused on healthcare data for **20+ years**
- **95%** customer retention rate
- **Purpose-built team** of healthcare industry veterans, data analysts and customer service partners

At HealthLink Dimensions, our clients benefit from a suite of solutions tailored to solve their unique healthcare data challenges — all from one trusted partner. For a complimentary data analysis or list match, call us at **404-250-3900** or visit us at **healthlinkdimensions.com.**