Getting Back to Basics

How HCP Communications are (Somewhat) Shifting Back to Pre-Pandemic Norms

Introduction

Healthcare providers have had to make several changes to their communication practices over the last few years, from embracing telehealth to keeping up with the firehose of new information coming out regarding the COVID-19 virus.

Now, as the global pandemic wanes and the deluge of new information slows, many healthcare providers are taking a breath. They are also starting to return to pre-pandemic modes of communication, such as in-person events and meetings.

In addition, today's healthcare providers seem to be embracing new ways of receiving educational information and networking with other healthcare providers, both online and in person. Thus, healthcare and pharmaceutical marketers should not remain complacent by relying on the communication methods that worked during the pandemic. But, at the same time, they should not fall back on the same pre-pandemic modes of communication.

Instead, they need to navigate a new, more nuanced approach to healthcare communication, one that respects healthcare providers' time while also delivering messaging based on their preferred methods of communication.

Key Takeaways

It is clear from our recent survey that there has been a shift in how healthcare providers prefer to interact with their network and marketing partners on this side of the pandemic. Here are some key takeaways from our 2023 survey.

#1

In-person meetings are starting to make a comeback, whether with other providers, medical experts, or marketers.

#2

Educational information remains the most important form of information HCPs want to receive from marketers, preferably through email.

#3

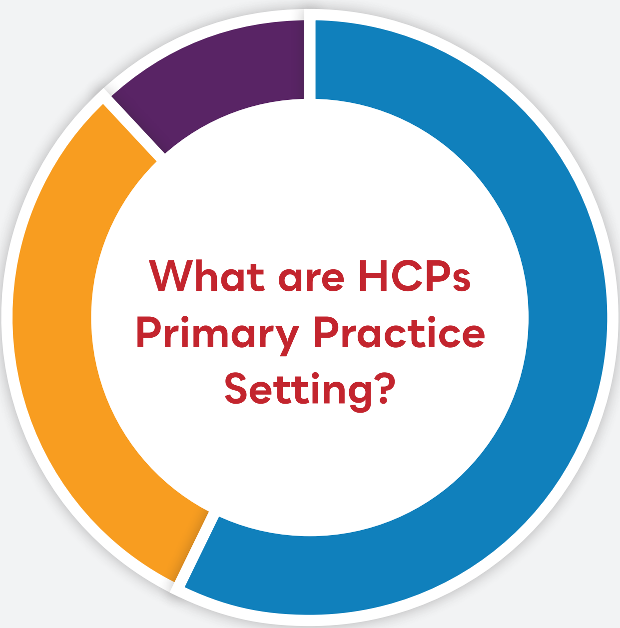
Email remains the preferred form of communication among busy providers, who are spending less time reading up on professional information outside the office.

Part 1:

Most Respondents Practice in Offices

The number of HCPs practicing in hospitals has remained relatively steady since last year, dropping only 3% from 34% practicing in hospitals in 2021 to 31% in 2022. However, there has been a significant increase in the number of HCPs practicing in offices (up from 46% to 55%) and a decrease in the number of respondents practicing in other healthcare settings (down to 12% from 20%).

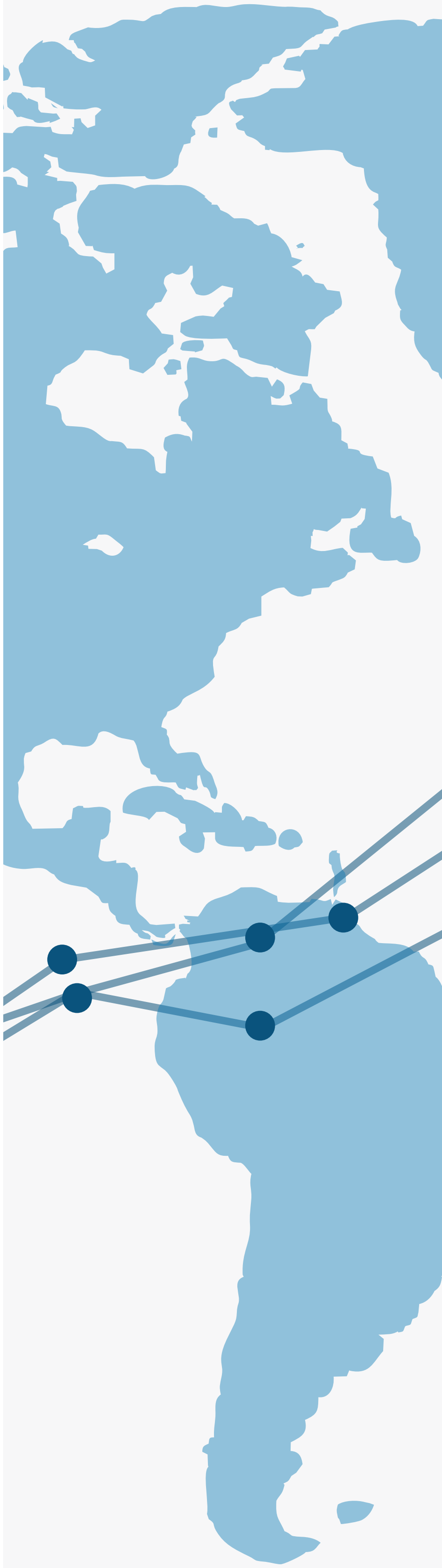
These numbers reflect a slow return to pre-pandemic norms as more providers transition from alternative practice locations to more traditional office and hospital settings.



Office Based: **55%**

Hospital Based: **31%**

Other Healthcare Settings: **12%**



Providers Overwhelmingly Favor Email Over Other Forms of Outreach

When it comes to communication preferences, the preferred method of communication has mostly stayed the same since last year. Our survey found that three-quarters of respondents prefer to be contacted via email for industry communications, which is slightly higher than last year.

75%

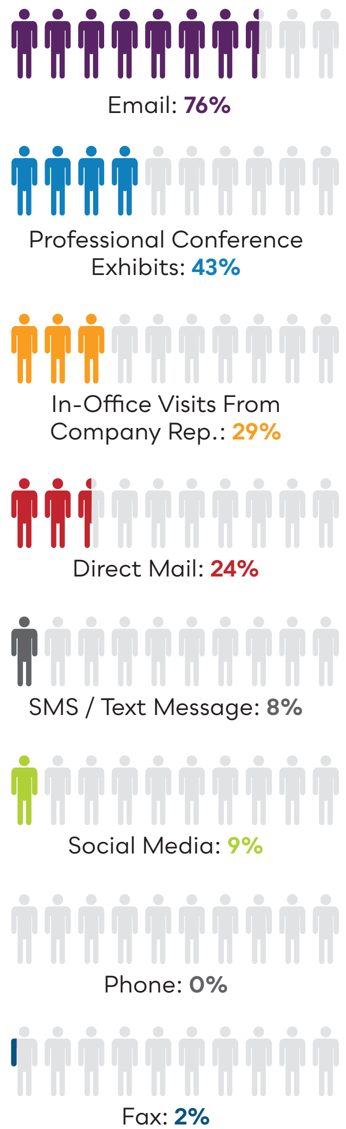
of respondents prefer to be contacted via email for industry communciations.

Professional conferences continue to be the second most favored form of communication, rising from 12% preferring this method in 2021 to 43% in 2022.

Somewhat surprisingly, direct mail and in-office visits from company representatives have risen dramatically since last year, with 24% favoring direct mail and 29% preferring in-office rep visits. However, in 2021, only 4% favored direct mail, and 9% preferred in-office visits.

Notably, two preferred communication methods, professional conferences, and in-office visits, require face-to-face interaction. The fact that both of these methods of communication are gaining popularity among healthcare providers suggests that HCPs are eager to return to pre-pandemic forms of communication that require more in-person interaction, which was limited during the COVID-19 pandemic.

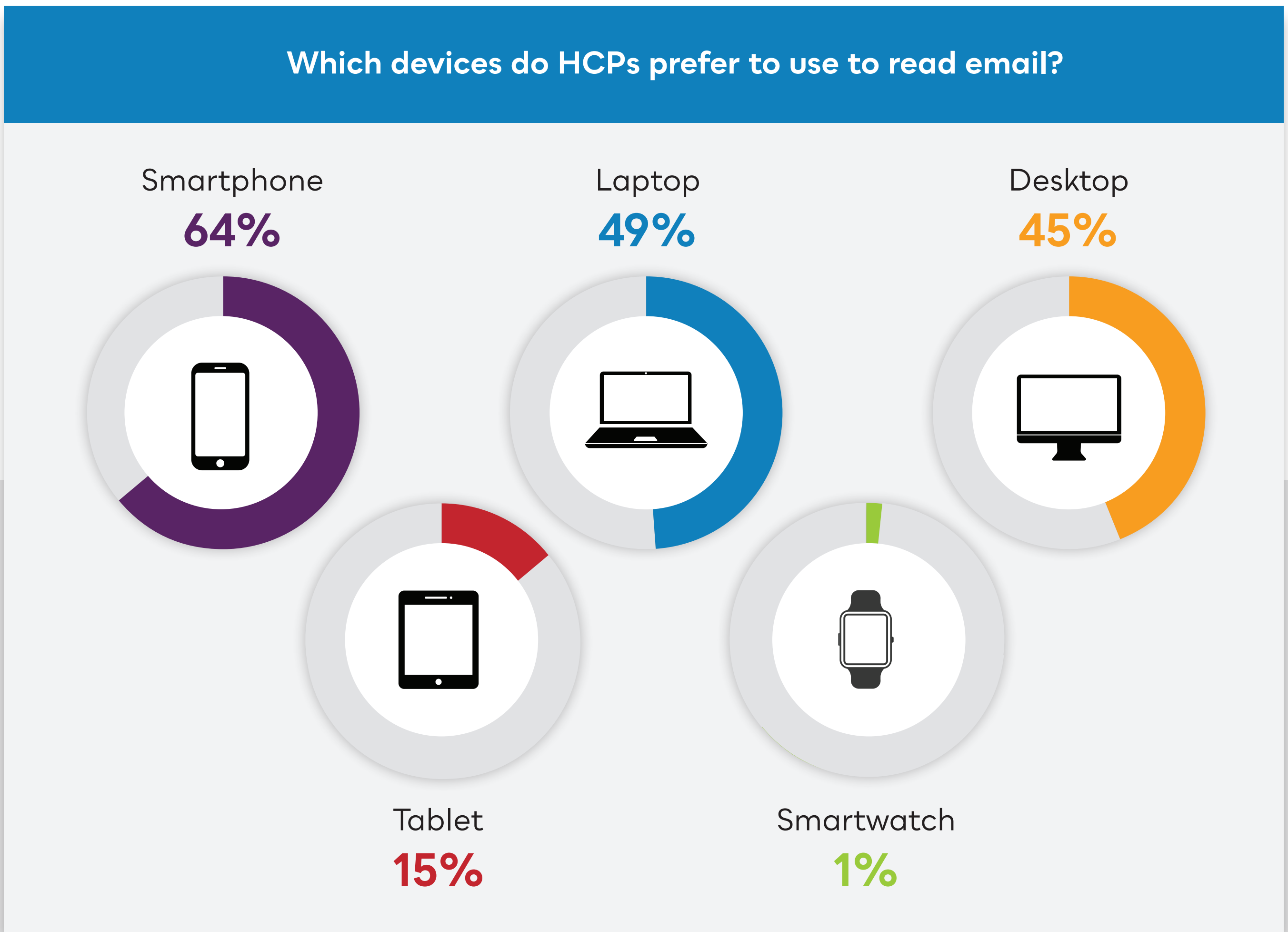
What are HCPs' preferred method of receiving industry communications that inform you of industry news, product updates and announcements, or research and educational opportunities?



Smartphones Continue to Be the Clear Winner for Reading Emails

In our 2021 survey, smartphones were the clear winner for reading emails, with 50% of respondents citing them as their primary device.

The trend holds in 2022, as 64% of respondents cite smartphones as their device of choice. However, laptops and desktops are catching up in a big way, with 45% of HCPs preferring desktops to read emails and 49% preferring laptops. This may correlate with the fact that more HCPs are working from an office or hospital. However, our survey did not directly ask why providers preferred one device over another for email reading.

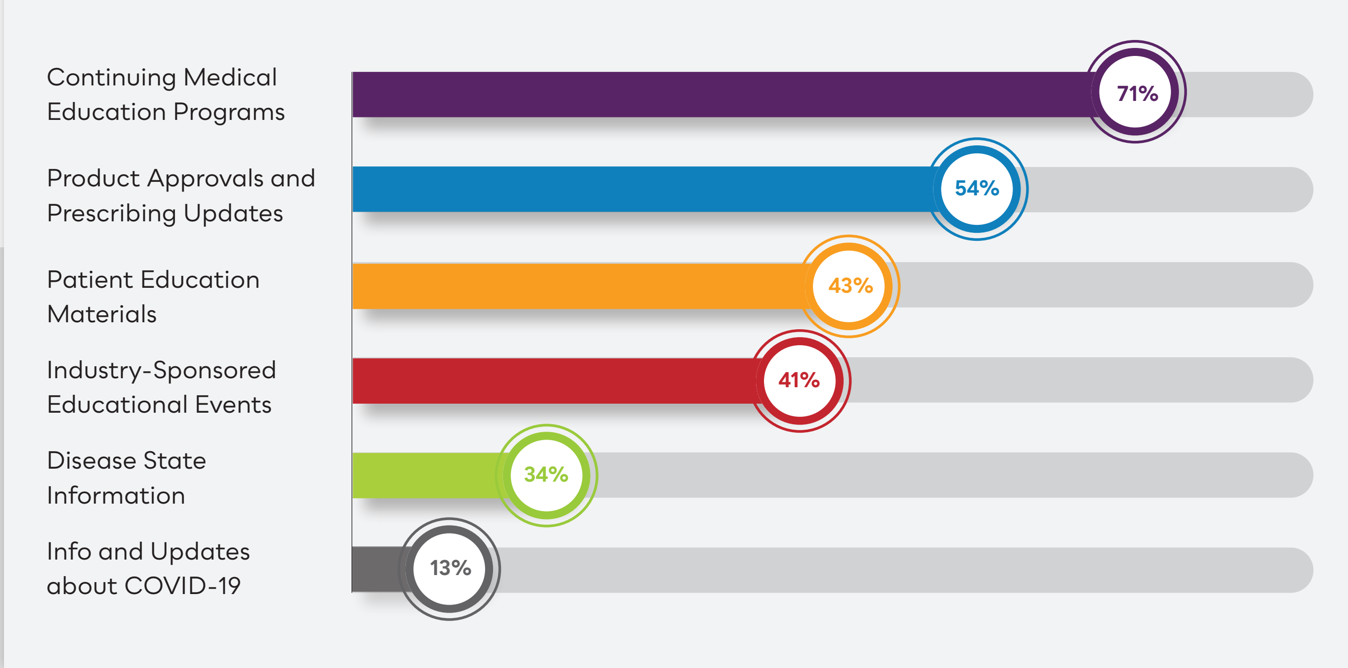


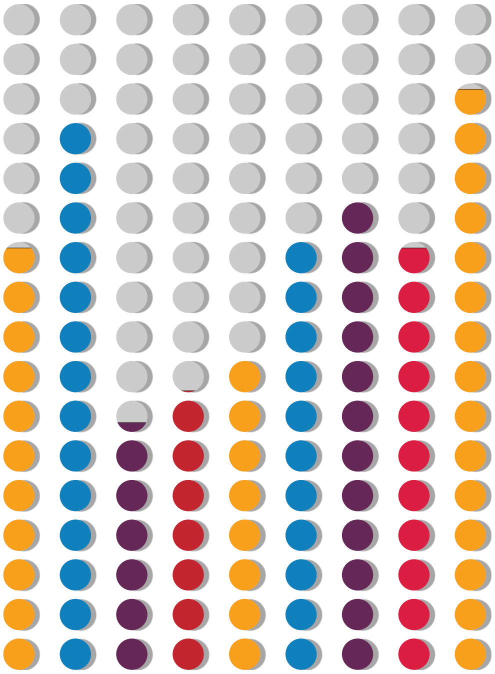
Marketers Should Continue Delivering Educational Information

Our 2022 survey reveals that educational content is still the most important type of content HCPs want to receive from pharmaceutical and medical device manufacturers, which aligns with last year's results. The most favored type of educational content is continuing medical education programs, followed by product approvals and prescribing updates, patient education materials, and industry-sponsored educational events.

As in 2021, providers did not favor thought leadership information in 2022. New this year, information and updates about COVID-19 were also not preferred by many, with only 12.64% of respondents citing it as the information they want to receive from marketers.

What type of information do HCPs prefer to receive from Pharmaceutical and Medical Device manufacturers?



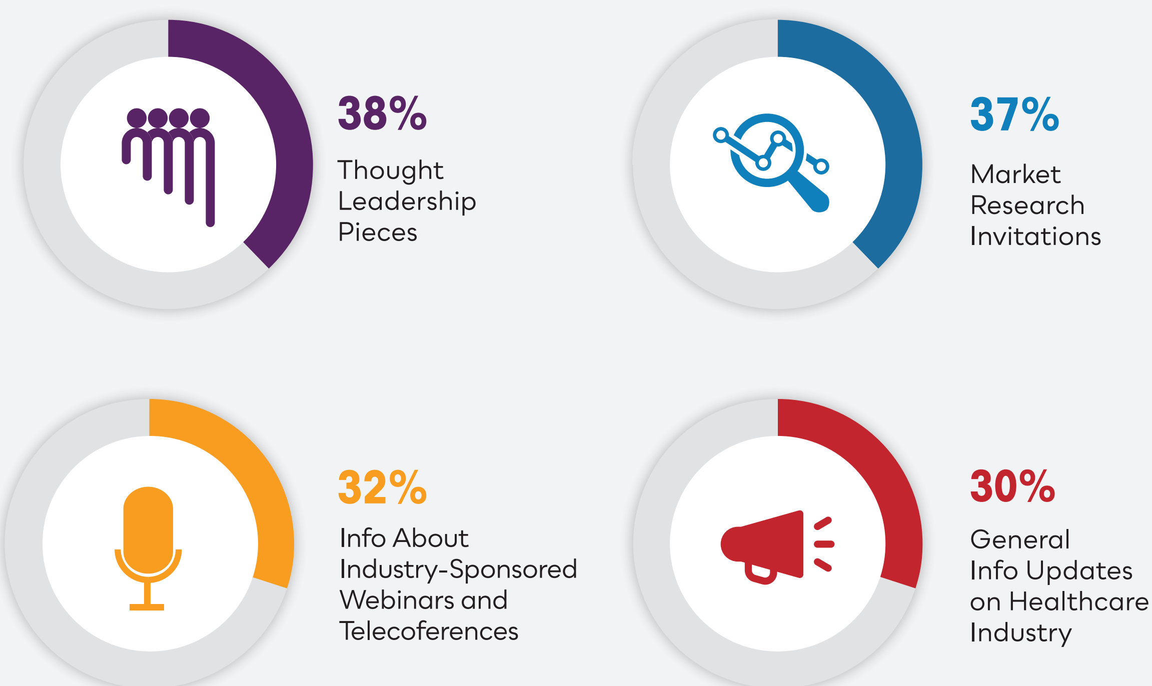


Marketers Should Reconsider Sending Generic Updates

When asked about the most annoying or unhelpful information they receive from pharmaceutical and medical device manufacturers, HCPs strongly indicated their dislike of receiving non-educational marketing materials, such as thought leadership pieces, market research invitations, information about industry-sponsored webinars and teleconferences, and general information updates on the healthcare industry.

Updates considered the least annoying surround education, including continuing medical education programs, industry-sponsored educational events, and product approvals and prescribing updates. These responses suggest that the best use of marketers' time is to find ways to deliver helpful information rather than spamming providers with generic information that offers minimal value to providers and the patients they serve.

What type of information do HCPs dislike receiving from Pharmaceutical and Medical Device manufacturers?



Want to Invite an HCP to an Event? Send an Email or Office Invite

Providers are open to receiving invitations to events – in certain formats. The trend we saw in 2021 of HCPs preferring email invitations over all other forms remains strong in 2022, with 69% of respondents favoring an email invitation with a website link for registration over all other forms of invitations.

However, unlike in 2021, this year, the next most favored way to receive an invitation is through a company representative invitation delivered to the office. In 2021, direct mail was the second preferred method. A phone call solicitation to participate remains the very last preferred method in 2022, which is the same as last year. So, marketers should consider ditching the phone and instead offering a more personalized invitation, whether by email or an in-person invite.

Which type of invitations for webinar, teleconference, or educational events are HCPs most likely to read and respond to?

69%	30%	24%	2%
Email Invite With Website Link for Registration	Company Rep. Invite Delivered to the Office	Direct Mail Invite to the Office	Phone Call Solicitation to Participate

Are HCPs allowing medical sales representatives to physically visit their office?

Allow In-Office Visits from Sales Reps	55%
Refuse In-Office Visits from Sales Reps	44%

In-Office Meetings are Gaining Traction

In 2021, we were still in the midst of a pandemic, which meant most providers were resistant to receiving in-office visits from representatives. This year, the majority of HCPs (55%) allow medical sales representatives to make in-office visits. However, 44% still don't want to talk to reps in person, although this may or may not be related to the COVID-19 pandemic. Our survey did not ask providers to indicate their reasons for wanting or not wanting in-office visits from medical reps.

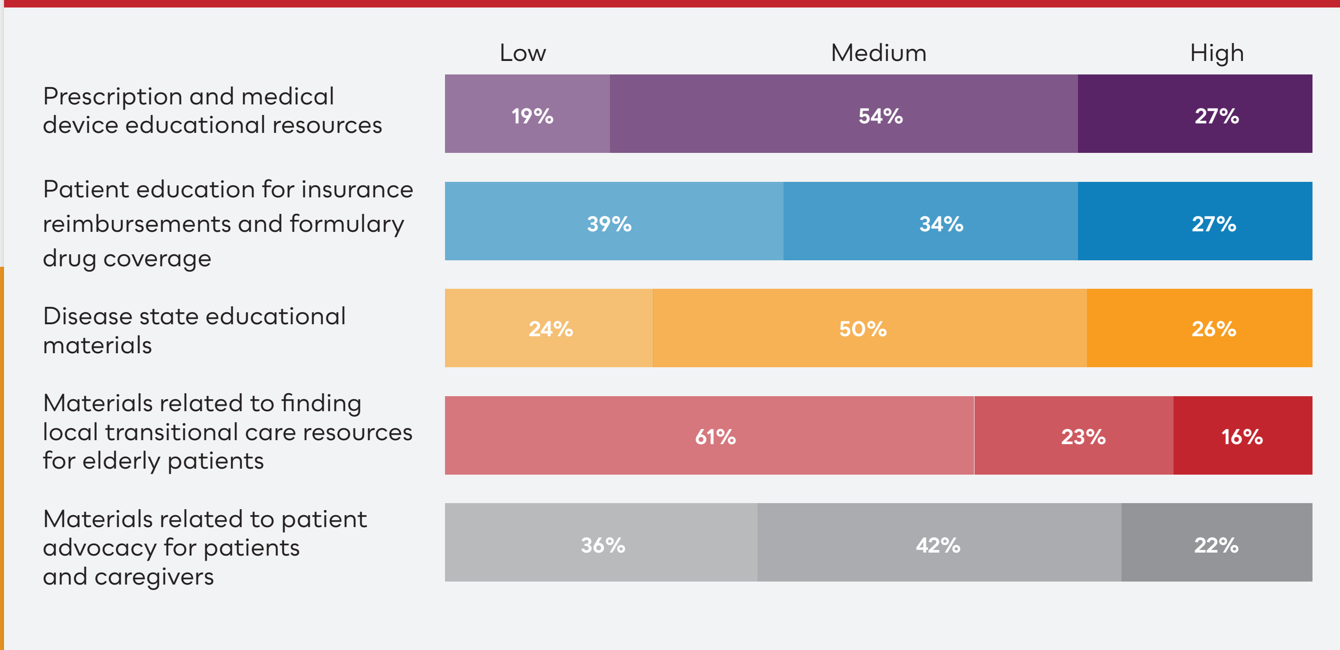
Demand Continues for a Broad Range of Patient Support Materials

The general role of healthcare providers has remained the same from 2021 to 2022. Providers continue to serve a range of patients with varying needs. Thus, there is continued demand for a broad range of patient support materials. However, the types of materials considered beneficial and less-than-useful have shifted a bit since 2021.

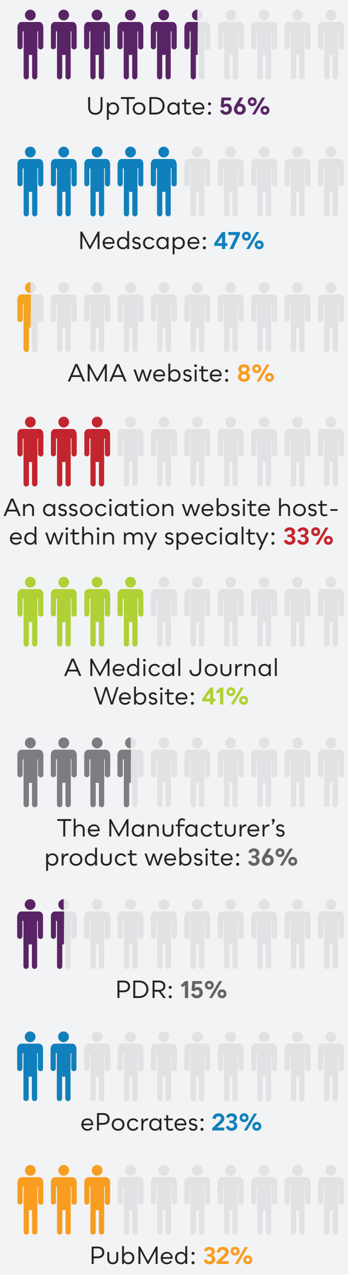
This year, the materials considered the least useful among our respondents were related to finding local transitional care resources for elderly patients. Additionally, materials related to patient advocacy for patients and caregivers are seen as more useful in 2022 than in 2021. This result may reflect the fields of medicine represented by the providers we surveyed.

In 2022, respondents cited the most helpful type of material as patient education for insurance reimbursements and formulary drug coverage. This contrasts with last year when prescription and medical device educational resources were the most helpful material. This change may reflect government mandates that went into effect in 2021, such as the No Surprises Act. However, our survey did not expressly ask providers to list a reason for their responses.

HCPs rated the following types of patient support in terms of how useful they are for their practice.



When seeking online information related to healthcare products, medical devices, or disease state knowledge, which websites do HCPs most commonly visit?



Evidence-based Online Resources are Trusted More Than Others

The results of our 2021 survey indicated an overall skepticism toward online medical information. Medscape was the clear winner, with 70% of respondents choosing it when searching online for information related to healthcare products, medical devices, or disease state knowledge.

In 2022, UpToDate overtook Medscape as the go-to online resource for HCPs, with 56% of respondents choosing it when searching online for information. Medscape is the number two choice, though only half of the respondents consider it their first choice. In addition, trust in the AMA website has plummeted, down from 20% in 2021 to under 8% in 2022.

Fewer HCPs are Using Social Media

The results of our 2021 survey overwhelmingly indicated that HCPs preferred not to use social media for any professional purposes, with 55% of respondents denying the use of social media in a professional capacity.

In 2022, that has become even clearer, with 60% of respondents saying they never use social media professionally. The most popular reason for those using social media is to communicate with other physicians and healthcare professionals. 4% of respondents use social media to communicate with patients.

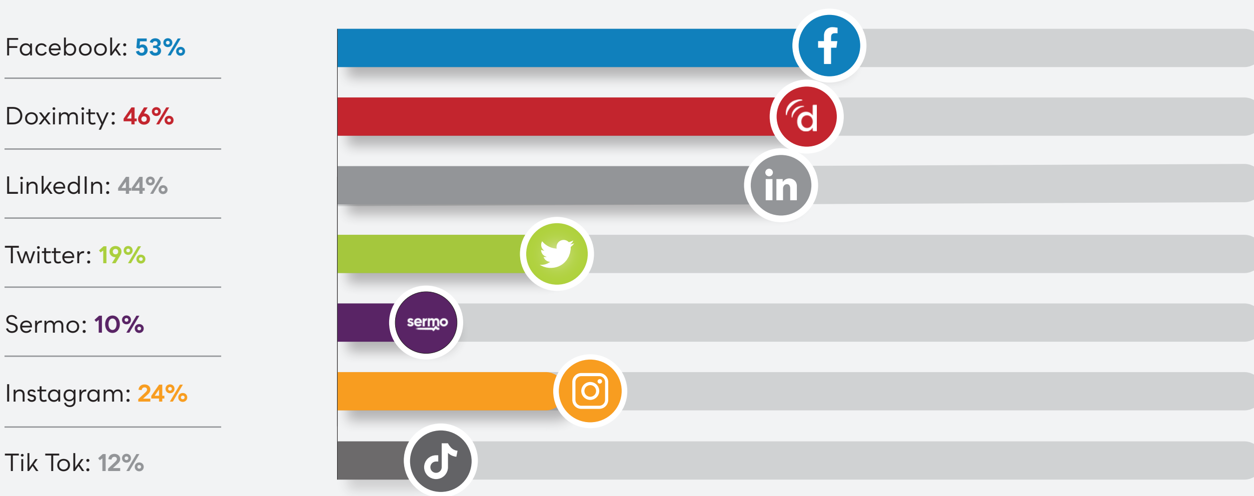
Do HCPs participate in social networking sites for professional purposes?

Specialized Social Media and Networking Platforms are Gaining Traction

For HCPs who actively participate in social or professional networks, Facebook is the most popular platform. Coming in a close second, though, is Doximity, a social network specifically designed for medical professionals. LinkedIn is a close third. These responses validate the idea that HCPs who use social media for professional reasons primarily seek to network and connect with other providers and experts rather than interact with patients or others.

53% of HCPs use Facebook for professional reasons.

Which social or professional networks do HCPs actively participate in?



Out-of-Office Professional Development Continues

It's no secret that healthcare professionals are busy people with packed schedules. So, it may not come as a surprise that most of them take some time outside the office to consume professional information. In 2022, notably, more HCPs spend 30 – 60 minutes a day consuming professional information outside of the office than they did in 2021, up from 67% to 78%.

However, in 2022, zero HCPs consume more than two hours of professional information a day, down from 7% in 2021. This could indicate that HCPs are prioritizing other things when they are outside the office, such as focusing on their personal lives. On the other hand, it could also be that HCPs are spending more time in the office this year, so they are consuming more professional information in their workspaces than at home.

How much time on average do HCPs spend consuming professional information when they are not at work?

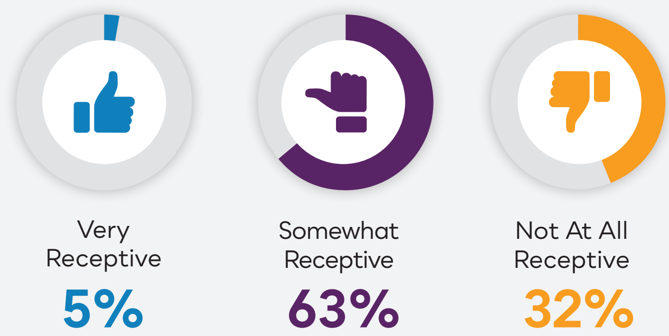
None	10%
30-60 minutes/day:	78%
1-2 hours/day:	12%
More than 2 hours/day:	0%

Eagerness for Digital Advertising Wanes

In 2021, 15% of providers were very receptive to receiving digital advertising communications from pharmaceutical, medical device, or other healthcare organizations. While that was a relatively small number, it dropped significantly to just over 5% in 2022.

However, all is not lost for marketers. The majority of HCPs (61%) said they are somewhat receptive to receiving digital advertising communications. This year's responses may indicate that providers are becoming more selective about the type of advertising communications they choose to read and engage with.

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

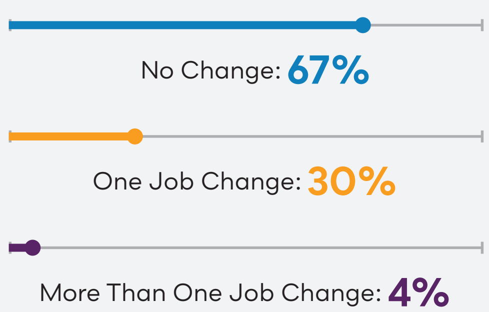


Providers are Starting to Seek Employment Elsewhere

Last year when we asked providers how many job changes they had made since the beginning of the COVID-19 pandemic, 75% indicated that their employment status had stayed the same. However, this year, when we asked how many job changes they have made since March 2020, only 67% answered that they had not made any changes.

Of the respondents, nearly 30% have made one job change since March 2020. Those job changes may have taken place inside the healthcare field or taken respondents to another industry. If those changes took providers out of the medical field, it could be a sign of troubling times ahead in the healthcare industry, which is already struggling with recruiting and retaining talented healthcare professionals.

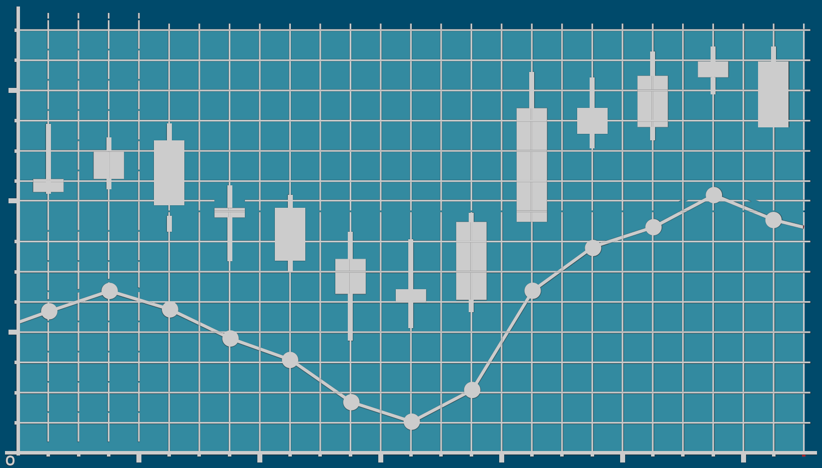
How have HCPs employment statuses changed since the beginning of the COVID-19 pandemic in March 2020?



About the 2023 HealthLink Dimensions HCP Communications Survey

HealthLink Dimensions conducts this survey annually to gauge how healthcare providers feel about advertising, communication, and their position in the greater healthcare industry.

This year's survey was promoted via email, social, and display advertisements to over 400K MDs and DOs during December of 2022 and January of 2023. Respondent practice areas include Allergy & Immunology, Anesthesiology, Cardiology, Clinical Pharmacology, Dermatology, Emergency Medicine, Family Medicine, Gastroenterology, Geriatrics, Hospitalists, Internal Medicine, Neurology, Obstetrics & Gynecology, Oncology (Medical and Radiation), Opthalmology, Otolaryngology, Pain Medicine, Pathology, Pediatrics, Psychiatry, Pulmonology, Radiology, Surgery (Colon & Rectal), Surgery (Orthopedic), and Urology.



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.

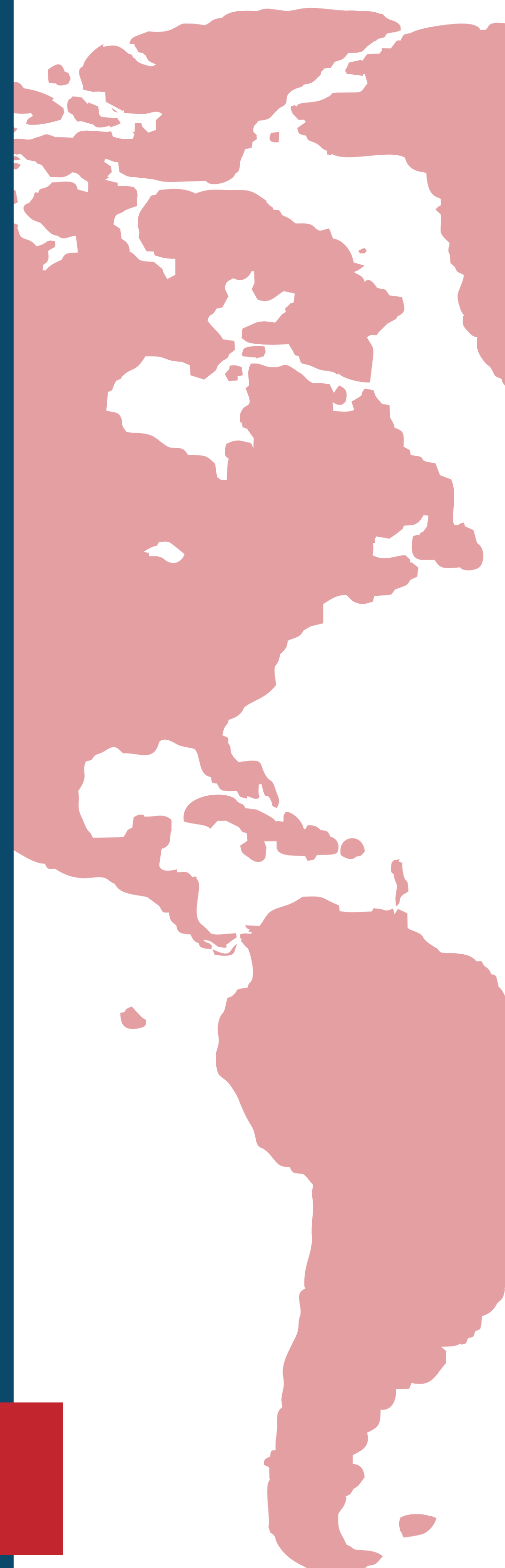
5.6M
Active Healthcare Providers

6,900
Hospitals

95%
Client Retention

1.7M
Provider Email Addresses, secured from 500+ sources, processed through our proprietary algorithms

Continuously cleansed and verified in clinical settings daily by our Provider Research Center team



Who We Are

HealthLink Dimensions has focused exclusively on healthcare data for the last 20 years. Our purpose-driven team comprises healthcare industry veterans, data analysts, and customer service partners.

HealthLink Dimensions is a trusted partner, offering clients a suite of solutions — including data verified daily in clinical settings — tailored to solve their unique healthcare data challenges.

What Would You Like To Know About Your Prescribers?

Hospitals, pharmaceutical companies, and their marketing partners choose HealthLink Dimensions for the size of its clients, the accuracy of its data, and the fine detail provided about the prescribers they want to reach.

In addition to more than 1.7 million verified email addresses, clients can get granular with detailed information, including:

- Clinical Data
- Contact Information
- Business Information
- Engagement Method
- Credentialing

Additional Services

At HealthLink Dimensions, we know optimizing your reach is essential to your overall marketing strategy. That's why we offer additional solutions to partners, including:

- Optimized send times based on artificial intelligence
- Email licensing and deployment
- Programmatic advertising

For a complimentary data analysis or list match, contact us at 404-250-3900 **or visit** healthlinkdimensions.com.