PHARMA
REMOTE ENGAGEMENT
SURVEY

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INTRODUCTION

IN THE "ALWAYS CONNECTED" ENVIRONMENT THAT WE CURRENTLY LIVE IN AND THE ENDLESS RESOURCES AVAILABLE AT OUR FINGERTIPS ON THE INTERNET, PEOPLE WITH MEDICAL CONDITIONS HAVE MORE INFORMATION ABOUT THEIR CONDITION AND TREATMENT OPTIONS THAN EVER BEFORE.

In the United States alone, since as far back as 2001, more than 52 million adults have searched the internet for health and medical information.[1] This figure rose to 93 million in the year 2016.[2] Such a high level of knowledge among patients visiting healthcare professionals (HCPs) is changing the patient-physician relationship when it comes to choosing treatment options. Gerber and Eiser[3] opine that the availability of medical information online will influence the course of relationship and possibly influence health outcomes.

Therefore, physicians, in order to be a step ahead of their patients, access medical information online regularly. Several studies[4, 5] have outlined that more and more physicians are accessing the internet for medical information either just before seeing or while with their patients in order to seek information or to better and quicken their decision-making process. This shift in consumer behavior is fast replacing the standard practice of fulfilling medical information requests from HCPs, which includes responding through traditional face-to-face interactions via medical or sales force personnel or often a written standard response letter sent via email or by post.

There is also a trend among HCPs toward not meeting industry personnel face to face due to lack of free time. In other words, pharma industry representatives are often denied access to HCPs.

In order to engage customers to drive medical strategy and address unsolicited medical inquiries, the industry is forced to consider novel strategies of meeting customers in their channel of choice.

KEY DRIVERS

THE KEY DRIVERS OF THE TREND WE CURRENTLY OBSERVE IN THE HEALTHCARE SPACE ARE:

- **AVAILABILITY OF A WIDE VARIETY OF ONLINE INFORMATION**

- **ACCESSIBILITY OF THE INTERNET ACROSS DIFFERENT DEVICES SUCH AS MOBILES, TABLETS, AND DESKTOPS**

- **AN INCREASING NUMBER OF PEOPLE BEING WELL INFORMED**

Although this "always connected" trend is a great opportunity for patients, physicians, and the healthcare industry, it also poses significant challenges on the type, quality, and reliability of the content available from these online sources. Healthcare companies are therefore under tremendous pressure to provide credible, unbiased, reliable, and high-quality medical information about their products and services and, most importantly, make them available on demand whenever and wherever the customer requires.

One emerging "on-demand" trend in engaging with HCPs is connecting remotely to discuss medical content using a dedicated audio-visual and screen-sharing platform. The use of such a platform comes with its own opportunities and challenges.

Although there are many scholarly articles and industry reports available on the use of the internet in searching for medical information, there is a clear need for a study when it comes to understanding the opportunities and challenges and predicting the future trend in the use of modern on-demand digital technology in discussing medical content with HCPs.

RESEARCH SCOPE

THIS STUDY AIMS TO UNDERSTAND THE OPPORTUNITIES AND CHALLENGES AND PREDICT THE FUTURE TREND IN THE USE OF MODERN ON-DEMAND DIGITAL TECHNOLOGY IN DISCUSSING MEDICAL CONTENT WITH HCPs; IDENTIFY HOW FREQUENTLY THE HEALTHCARE INDUSTRY ENGAGES WITH THE HCPs REMOTELY; AND IDENTIFY THE TYPES AND METHODS OF INTERACTION ALONG WITH THE KEY OPPORTUNITIES AND CHALLENGES FOR SUCH ENGAGEMENTS.

METHODOLOGY

THE SURVEY WAS DESIGNED BY THE AUTHORS AND CONDUCTED ONLINE USING AN ONLINE SURVEY DEVELOPMENT CLOUD-BASED SOFTWARE TO COLLECT RESPONSES.

Respondents were invited to participate in the survey via the authors' network. Duplicate survey responses from a single IP address were not accepted.
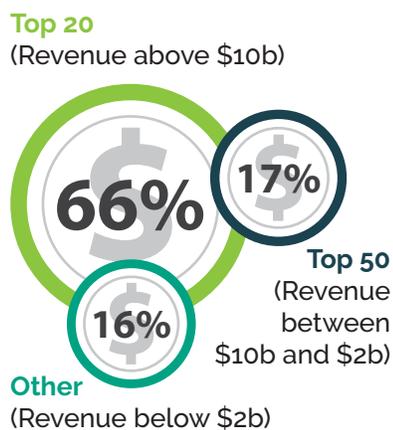
As this research was more strategic in nature, the targeted respondents were personnel holding senior positions within the industry. These were individuals who were responsible for taking strategic decisions regarding the identification and implementation of customer engagement plans. Having said that, responses were also collected from some end users such as medical science liaisons (MSLs) and commercial sales representatives to understand their perspectives.

There were 104 respondents from across the world. As this is not a probability-based sample, calculation of the theoretical margin of sampling error is not applicable.

Although 30 physicians from certain key markets also responded to the survey, which allowed the authors to understand the customer perspective, the sample was too small to provide statistically significant results. The authors are confident that the information gathered from this survey can be used to make important business decisions related to this particular topic.

SURVEY RESULTS

DEMOGRAPHICS

Europe 46%

Middle East 4%

Russia 3%

North America 20%

Brazil 3%

South Africa 3%

Asia 9%

JPAC 12%

Medical Device 2%

Biotechnology 10%

Pharmaceutical 88%

Top 20 (Revenue above $10b) 66%

Top 50 (Revenue between $10b and $2b) 17%

Other (Revenue below $2b) 16%

MSL director/manager 51%

Country medical affairs director/head 15%

Commercial 8%

MSL 13%

Other 12%
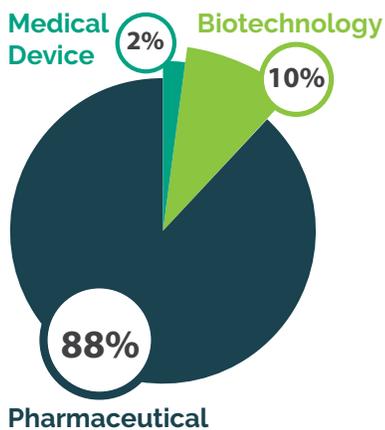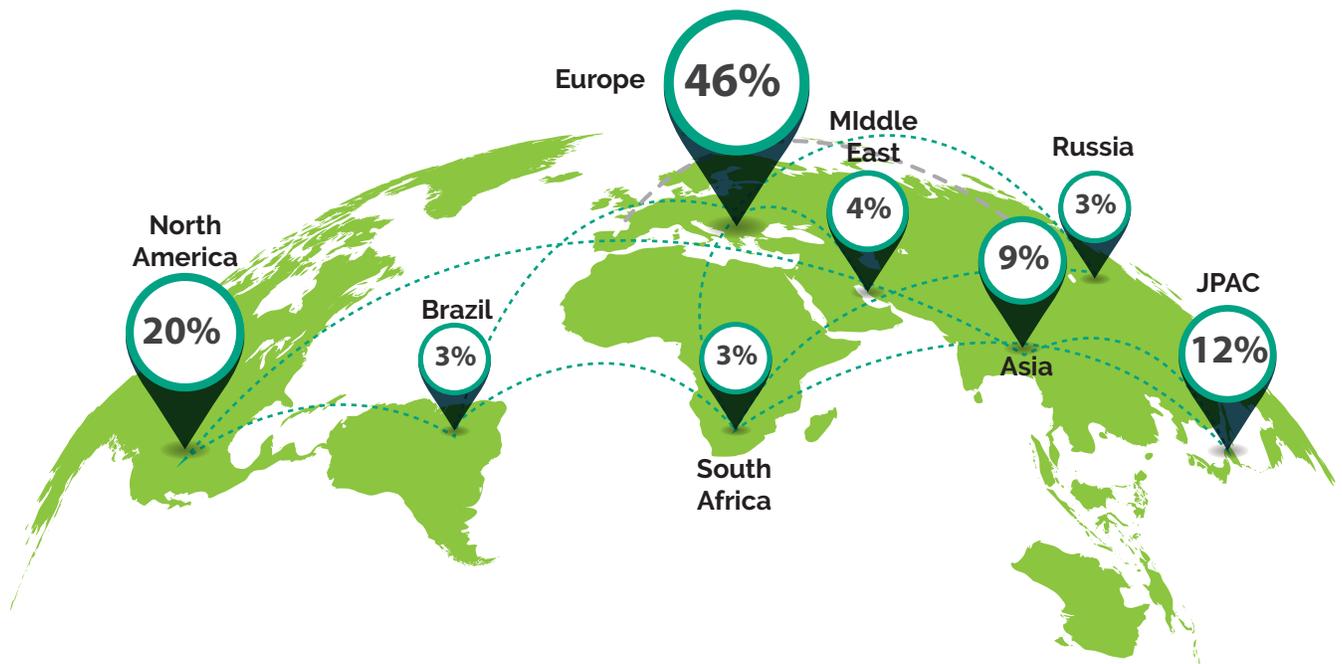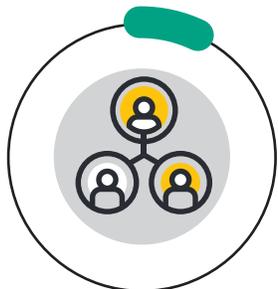
REMOTE ENGAGEMENT

DO YOU REMOTELY ENGAGE WITH HCPs?

7%
Are currently piloting a remote engagement platform

14%
Use an audio-visual platform

19%
Are currently thinking of piloting a remote engagement platform

48%
Use only "face-to-face" engagement

80%
Use only emails and phone calls. No dedicated platform

When asked if their organization remotely engaged with HCPs, 80% of the respondents said that they engaged only through emails and phone calls and did not have any dedicated platform to engage remotely. At the time of the survey, 48% of respondents had only face-to-face engagements, 19% were thinking of piloting remote engagement platforms, 14% used audio-visual platforms, and 7% were involved in piloting a dedicated remote engagement platform.

When asked how frequently they remotely engaged with HCPs, 47% of the respondents replied that they engaged sparingly, 25% engaged at least once a month, 7% at least once a week, and 7% every day or every other day.

A total of 52% of the respondents outlined that less than 10% of their total HCP engagements were conducted remotely, 25% of the respondents conducted 10% to 25% of their HCP engagements remotely, and 10% of the respondents stated that 25% to 75% of their HCP engagements were conducted remotely.

Among the organizations currently engaging with HCPs remotely, 35% of the respondents outlined that they dedicate a proportion of their current customer-facing staff time for remote engagements from remote locations such as their home offices and 12% from their offices, whereas 10% have dedicated office-based MSL staff to handle remote calls and 7% are currently thinking of deploying dedicated MSLs for this activity.

Very frequently,
(every day or every other day)
7%

Frequently
(at least once a week)
7%
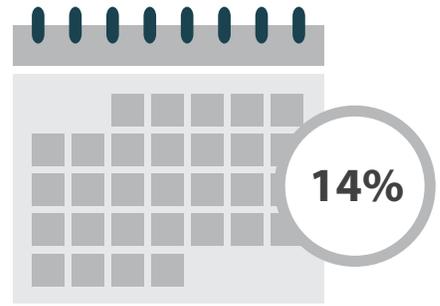
Not applicable
14%
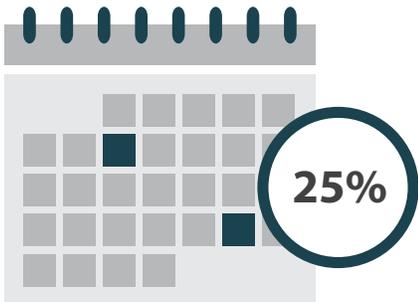
Less frequently
(at least once a month)
25%
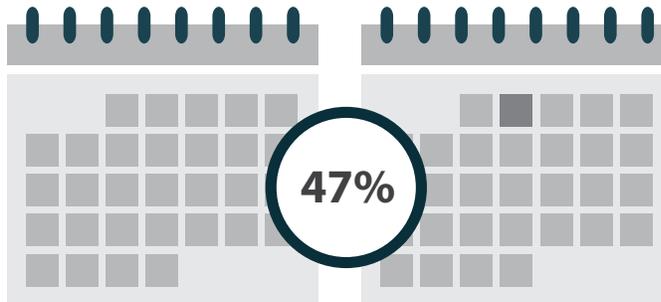
Sparingly
47%

% OF TOTAL ENGAGEMENTS CONDUCTED REMOTELY

>75%	1%
50%-75%	2%
25%-50%	7%
Not Applicable	12%
10%-25%	25%
<10%	52%

0   10   20   30   40   50   60
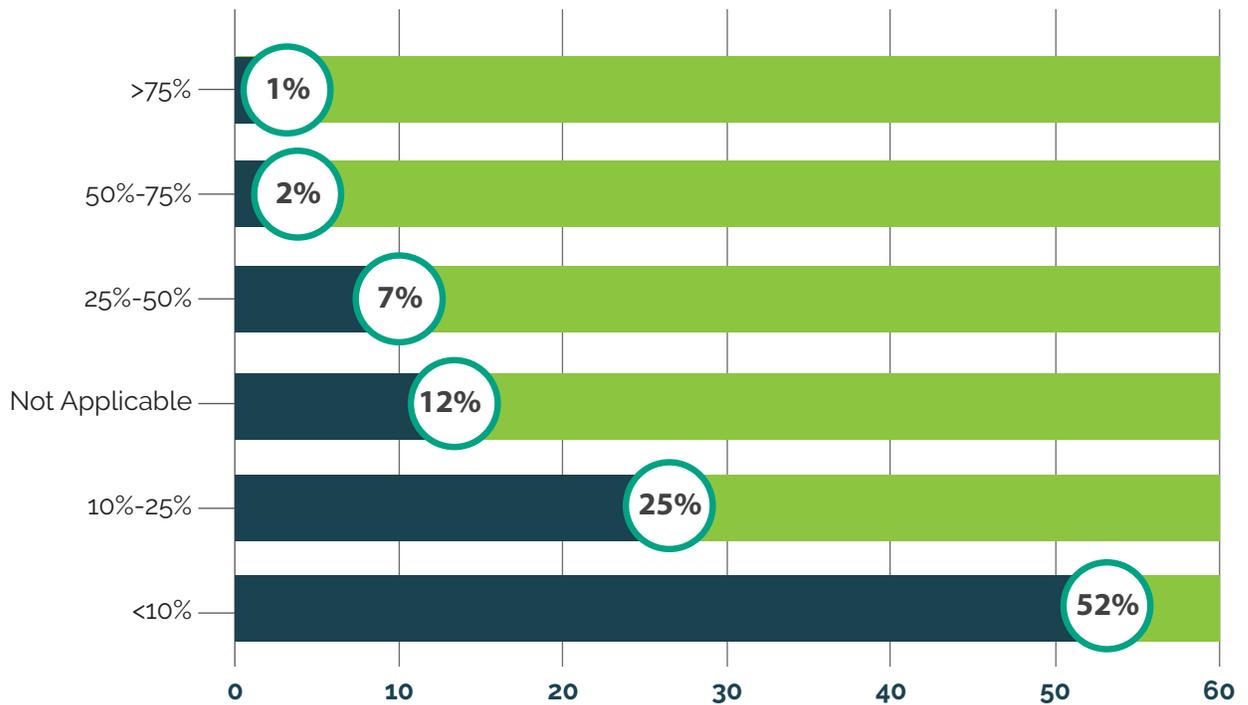
KEY TAKEAWAYS

Phone calls and emails seem to be the most used remote channels of engagement

Piloting audio-visual remote engagement seems to be the current trend across the industry

While a majority of companies currently dedicate a proportion of medical staff time, some organizations are thinking of having dedicated staff for remotely engaging with customers

A majority of the physicians seek specific product information on the internet

They also seek information from the company sales representatives/MSLs during their visits

THE PHYSICIANS' EXPECTATIONS FROM THE PHARMA INDUSTRY ARE AS FOLLOWS

Quick turnaround in answering their questions

Credible, unbiased, and non-promotional information

Broad in-depth knowledge of the person answering the questions

FREQUENTLY USED SCENARIOS FOR REMOTE ENGAGEMENT

REMOTE ENGAGEMENT METHODS USED TO ENGAGE WITH HCPs

Scenario	Value
Currently thinking of deploying dedicated MSL or field staff for this activity	7%
Dedicated "office-based" MSL/ staff to handle remote calls	10%
We do not have dedicated office-based staff to handle remote calls	12%
A proportion of our field staff time is regularly dedicated for remote engagement from the office	12%
Not applicable	24%
Proportion of our customer-facing staff time is dedicated for remote engagement from remote location (i.e., home office)	35%

(x-axis: 0, 10, 20, 30, 40)

Among the most popular scenarios, 52% of the respondents outlined that the MSLs preschedule remote discussions and conduct them from PCs, tablets, or mobile phones.

In all, 6% of the engagements arise from ongoing face-to-face detailing with an HCP, where a commercial sales representative connects the HCP with a remote MSL via a tablet.

FREQUENTLY USED SCENARIOS FOR REMOTE ENGAGEMENT

During ongoing remote detailing with HCP, the sales rep connects remote MSL via tablet: MSL conducts the session; HCP hands back the tablet to sales rep — **4%**

Other — **2%**

During ongoing face-to-face detailing with HCP, the sales rep connects the remote MSL via tablet: MSL conducts the session; HCP hands back the tablet to sales rep — **6%**

Not applicable — **36%**

MSL preschedules remote discussion via invite: MSL conducts session from PC, laptop, tablet, or mobile — **52%**

0   10   20   30   40   50   60

KEY TAKEAWAYS

Prescheduled calls with HCPs and using PCs/tablets/mobile phones to connect are the most popular trends.

OPPORTUNITIES AND CHALLENGES

OPPORTUNITIES PRESENTED BY REMOTE ENGAGEMENT (WEIGHTED AVERAGE)

Increased access to and for HCPs and insights about customer behaviors

Significant travel cost savings
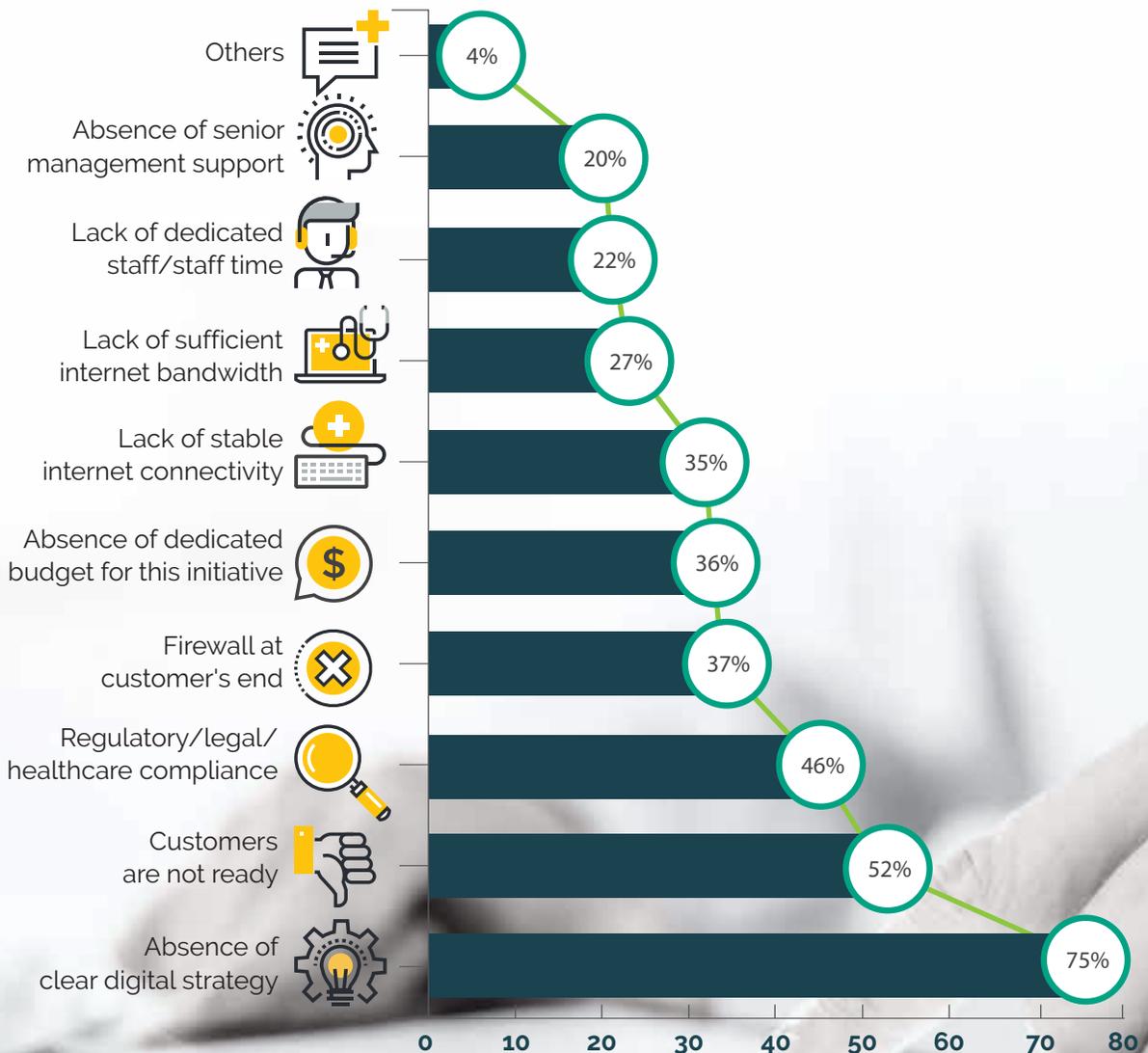
Decreased travel for field/medical personnel

Leveraging data across channels and functions to enhance customer experience

Shorter response time (quick turnaround for customer queries)

KEY CHALLENGES FOR REMOTE ENGAGEMENT

Challenge	Percentage
Others	4%
Absence of senior management support	20%
Lack of dedicated staff/staff time	22%
Lack of sufficient internet bandwidth	27%
Lack of stable internet connectivity	35%
Absence of dedicated budget for this initiative	36%
Firewall at customer's end	37%
Regulatory/legal/healthcare compliance	46%
Customers are not ready	52%
Absence of clear digital strategy	75%

When asked about the opportunities presented by remote engagement, a majority of the respondents outlined that it shortens the response time, followed by decreased travel time, leverage of data across channels and functions to enhance customer experience, increased access to HCPs, and significantly reduced costs.

Among the existing challenges, the absence of a clear organizational digital strategy and investment is seen as the major challenge, followed by unprepared customers, regulatory and healthcare compliance, lack of stable internet connectivity/bandwidth, and lack of dedicated staff or staff time.

KEY TAKEAWAYS

OPPORTUNITIES FOR REMOTE ENGAGEMENT

Shortens response time

Decreases travel time

Leverages data across channels

Enhances customer experience

Reduces costs significantly

CHALLENGES FOR IMPLEMENTING REMOTE ENGAGEMENT

Absence of a clear digital strategy and investment

Customers are unprepared

Regulatory and healthcare compliance

Lack of stable internet connectivity/bandwidth

Lack of dedicated staff/staff time

CUSTOMER PERSPECTIVE OF CHALLENGES

Lack of availability of appropriate technology

Lack of computer hardware

Poor/unstable internet connectivity

CONCLUSIONS AND RECOMMENDATION FOR FUTURE RESEARCH

THE INTERNET IS DRAMATICALLY CHANGING THE WAY PATIENTS AND HCPs ACCESS MEDICAL INFORMATION ABOUT DISEASE STATES AND CHOICE OF MEDICATION. THIS IS ALSO CHANGING THE PATIENT-PHYSICIAN RELATIONSHIP AND CUSTOMER EXPECTATIONS.

In an "always on" environment, HCPs also demand credible and unbiased medical information quickly, much quicker than the traditional face-to-face methods.

Although face-to-face engagements with HCPs are traditionally preferred and considered most effective, in a fast-paced environment that requires credible answers immediately, novel digital platforms can be used to leverage effective engagement when demanded by the customers.

Remote engagement platforms that do not require expensive hardware or high internet bandwidth and are easy to use offer tremendous opportunities to the healthcare sector in terms of quick or immediate credible responses to HCP questions about disease states and treatment options, leading to an improved customer experience. From the point of view of business, decreased pressure on travel budget and travel time and significant cost savings are seen as the key opportunities of remote engagements.

There are key challenges too in this area, ranging from lack of digital strategy to absence of dedicated personnel; lack of sufficient budget and support from senior management; and lack of stable internet connectivity, bandwidth, and firewall at the customers' end. Leveraging modern technology can help us overcome the technological challenges, whereas the right attitude, investment, and a push from the business side are imperative to make things work.

FINALLY, IN ORDER TO PROVIDE QUICK AND CREDIBLE SCIENTIFIC INFORMATION TO HCPs, THERE IS AN INCREASING NEED FOR THE HEALTHCARE INDUSTRY TO EMPLOY MODERN DIGITAL REMOTE ENGAGEMENT PLATFORMS.

Although this research has identified the key trends, challenges, and opportunities, there is a need for further structured and in-depth research on the beliefs, attitudes, and preferences of individuals who are using but not willing to use novel digital technologies. Interestingly, the dialogue with customers on remote engagement uncovers a more fundamental challenge that revolves around developing a content strategy to support remote engagement and connecting the customer to the best qualified person quickly and seamlessly.

NOTES

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