

HCP Engagement in the AI Age

Produced in Conjunction with



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EXECUTIVE SUMMARY

Healthcare Professional (HCP) engagement is entering the era of artificial intelligence (AI). Having embraced omnichannel engagement, automation and other digital transformations, pharma companies are now exploring how AI can empower their teams to improve HCP targeting, content creation and other tasks. This white paper explores the rise of AI alongside other trends and developments revealed in our latest 2024 survey of almost 250 industry leaders.

The paper examines how executives across marketing, commercial and medical affairs functions are responding to the maturation of generative AI while refining their approaches to omnichannel, social media, educational activities and other important traditional and emerging aspects of HCP engagement.

Our data provides a close look at the channels and activities that companies are prioritising today, as well as how teams expect their budgets to evolve in the coming three to four years. Finally, throughout the paper the survey data is complemented by expertise from industry leaders who share insights into how trends and technologies are shaping their day-to-day activities.

AI IS REVEALING THE POTENTIAL FOR TRUE OMNICHANNEL

AI projects are under way or in the pipeline at more than 80% of the companies covered by the survey, with content creation, market research and digital marketing campaigns the most common uses of HCP engagement. The activity points to the potential for AI to facilitate key aspects of successful omnichannel campaigns such as consistent and personalised communication across traditional and digital channels.

OMNICHANNEL IS ENABLING EVENT ACTIVATION

The survey shows meetings and events, both in-person and virtual, and email marketing campaigns remain key areas of investment in 2024. Conversations with industry leaders show pharma companies striving to improve the orchestration of those channels and other media. Their aim: to enhance engagement of HCPs before, during and after events, and maximise the impact of large investments in conferences.

“WE START SEEING MORE AND MORE ENGAGEMENT ACTIVITIES THAT ARE POWERED BY AI. SOME COMPANIES ARE A BIT MORE RELUCTANT, A LITTLE BIT MORE SHY, OTHERS ... ARE GOING FULL ON AND USING AI, AS APPROPRIATE AND AS COMPLIANT, IN MANY, MANY DAILY TASKS”

Susana Bento, Global Omnichannel Operations Lead, Grünenthal

EDUCATIONAL PLATFORMS ARE ATTRACTING INVESTMENT

The forecast suggests that the effectiveness of educational platforms in meeting HCP demands hinges on their ability to offer personalized, flexible, and on-demand learning opportunities. This trend is further amplified by the ongoing digitalization, enhanced global accessibility, and the integration of multimedia content. Significantly, 57% of survey respondents anticipate increasing their investments in such educational platforms, indicating a robust growth potential and a shift towards more dynamic and user-centric educational models.

57%

of respondents intend to increase spending on education platforms, making them the top target for additional educational investment.



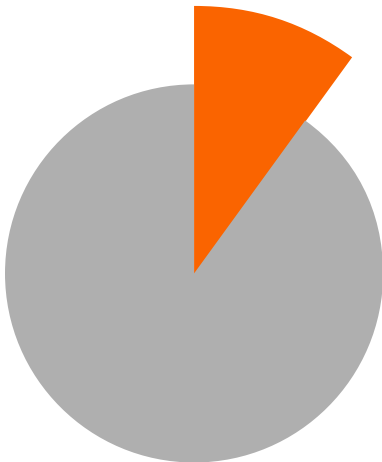
SOCIAL MEDIA ADVERTISING IS EXPECTED TO INCREASE

Social media advertising is set to benefit from the biggest funding boost of any channel in the next three to four years, with 16% of respondents predicting that their budgets will grow by 10% or more. Companies are still working out strategies in an evolving landscape but the unique opportunities for targeting, engagement and community building have moved social media to the top of industry to-do lists.

Denis Conlon, VP, Global Marketing, Elsevier, Pharma and Life Sciences Solutions, explains the case for investing in social media in terms of how changes in physician behaviour are creating opportunities for companies to add value: “It is clear why pharmaceutical marketers and medical affairs professionals are increasingly interested in amplifying their presence on these platforms. Investing in social media activities not only aligns with the evolving dynamics of physician engagement but also offers a unique opportunity to contribute value to these professional communities through relevant, high-quality content and support.”

16%

of respondents predicting that their social media budgets will grow by +10% or more



INTRODUCTION

The stage is set for a golden age of HCP engagement. The entry of digital native healthcare professionals (HCPs) into the workforce has created an engaged set of customers who are actively seeking information. At the same time, the proliferation of channels has given marketing and medical affairs professionals more ways to engage HCPs than ever. Yet, the trends have spawned both major improvements and new problems.



Challenges tied to abundance have replaced old problems linked to the scarcity of information, channels and interactions. Time-pressed HCPs are inundated with content and overwhelmingly prefer information from independent sources over pharma companies.¹ To cut through, marketing and medical affairs teams need to provide HCPs with easy access to relevant, reliable and up-to-date information.

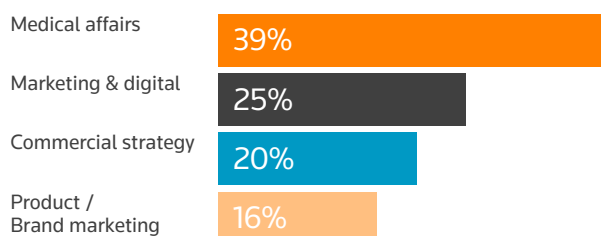
As companies strive to personalise content and orchestrate channels, they are exploring AI tools that could automate workflows and provide data-driven insights into the best ways to engage HCPs.

To unpack the latest developments in HCP engagement in 2024, we surveyed 246 global industry executives in medical affairs, marketing, commercial strategy, and product or brand marketing. In addition, six leading experts shared their views on the trends the survey uncovers. The survey is a follow-up to research done in 2021 and 2023 and shows how the industry is evolving.^{3,4}

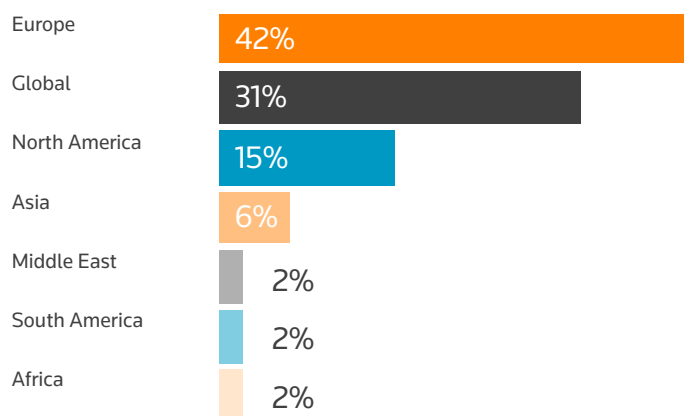
ABOUT THE SURVEY

For our latest industry trends research, we surveyed 246 leading pharma, biotech and medtech executives globally working in medical affairs, marketing, commercial strategy and product or brand marketing at manager-level and above. The focus was on those with responsibilities for regions that include North America, Europe and Asia Pacific. Regions are usually not exclusive.

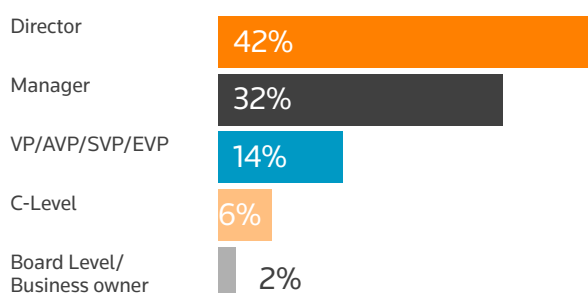
What function are you most closely aligned with?



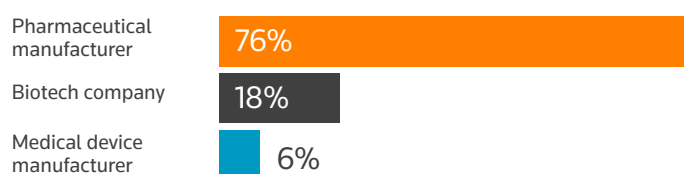
Which regions are you responsible for in your current role? Select all that apply.



Which of the following best describes your seniority?



What type of organization do you work for?



LATEST TRENDS IN HCP ENGAGEMENT

The 2023 survey showed how omnichannel engagement of HCPs had risen quickly in importance over the previous 18 months, a period that was significantly affected by COVID-19. The 2024 survey shows marketing and medical affairs professionals are now working to refine the new playbook.

OMNICHANNEL IS KEY TO THE EVENT JOURNEY

The industry's priority channels for 2024 reflect experience of what has worked since in-person activities resumed. Dan Johnson, Head of BU GI, Neuroscience, Vaccines and Established Brands Switzerland, Takeda, says the amount of face-to-face interactions and the value they create was interesting to see, adding that Takeda has worked to optimise "engagement points and moments that matter face to face" while creating and using more digital tools and programs.

Alexander Frenzel, Multi-Channel Marketing Lead, Global Business Franchise Fertility at Merck KGaA, hit on similar points. Frenzel has focused on improving customer journeys around events, with a particular emphasis on standardising and digitising engagement. Fahad Jameel, Senior Director, Medical Excellence, Region North West Europe at Novo Nordisk, named similar work on congresses as the big shift at his group over the past year.

"Before a congress we send email teasers of what HCPs may look forward to. During the congress we have daily

updates, and after the congress we summarise events beyond Novo Nordisk content. We make some content that is more holistic about recent advances and their clinical impact using short videos or podcasts," Jameel says.

The strategy is aligned with the preferences HCPs have expressed in other surveys. Globally, 63% of physicians said events and congresses influence their treatment decisions.⁵ Another survey found 81% of physicians want to access key takeaways for scientific meetings they are unable to attend.¹

Running omnichannel campaigns that include in-person events is a primary investment focus. Nearly 80% of respondents said that they plan to allocate funds to in-person meetings and events in 2024. These events are as popular as direct, face-to-face activities conducted by sales representatives, both being top promotional channels

Event-focused omnichannel strategies are made possible by shifts in how HCPs consume content. According to Susana Bento, Global Omnichannel Operations Lead at Grünenthal, the HCP workforce increasingly skews toward people who look to digital channels first.

"HAS THERE BEEN A DRAMATIC SHIFT IN HOW WE ENGAGE? NOT REALLY. HAVE WE BEEN STARTING TO ENGAGE MUCH SMARTER? YES."

Dan Johnson, Head of BU GI, Neuroscience, Vaccines and Established Brands Switzerland, Takeda

“There’s a general acceptance that the new go-to-market model is omnichannel, and they don’t see it as a terrible invasion of privacy or overwhelming,” she explains.

Bento’s insights are reflected in the move from print to digital. In 2024, respondents are expecting to allocate 42% of promotional budgets to print, with the rest going into digital. By 2027, the survey predicts print’s share of budgets will have fallen to 22%. Comparing the 2023 and 2024 surveys suggests the shift from

print to digital may be going slower than expected. Print’s share of budgets was actually higher in 2024 than 2023, when it accounted for 32% of spending.

As companies consider where to invest, they continue to be guided by the quality of content, information needs of the physician, and the availability of metrics to track effectiveness. The survey shows those factors are the top three drivers of decisions about promotional activities in 2024, as they were one year earlier.

How will you split out your promotional budget in 2024?

Print Digital



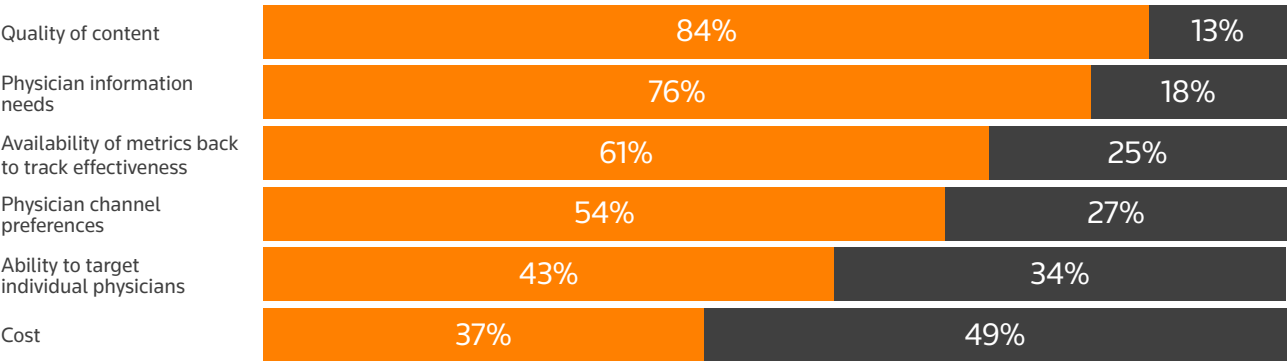
How will you split out your print vs. digital budget in 2027?

Print Digital



How important are the following factors in your decision making process about promotional activities?

Very important Somewhat important



SOCIAL MEDIA: A PROMISING WORK IN PROGRESS

Social media offers unique opportunities to engage HCPs, both before, during and after events, and as part of day-to-day marketing and medical affairs activities. Many companies are taking advantage of the opportunities, but the survey suggests that overall the industry is still figuring out how to approach social media.

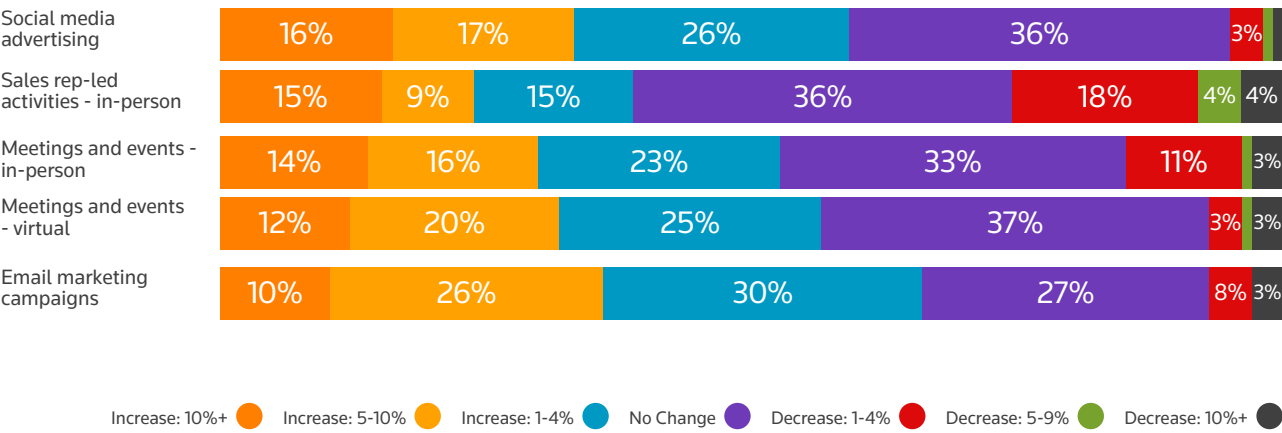
In 2023, around one-fifth of respondents were unlikely to invest in social media advertising. The remaining respondents were split evenly between people who were somewhat or very likely to put money into advertising on social media. In 2024, the figures were similar, with a dip in the proportion of people who are very likely to invest being the most notable shift.

1. See methodology in appendix A.

The findings align with the commentary of experts. Johnson says his team at Takeda uses social media “sparingly”, adding that “we’re very restricted in what we can do”. Similarly, Jameel says people are “risk averse”, and Novo Nordisk’s use of social media in his region is limited.

Yet, the 2024 survey suggests a big shift is coming. Over the next three to four years, 16% of respondents expect to increase promotional marketing budgets for social media by at least 10%. That makes social media the area most likely to receive a 10% or more budget boost. Social media is also the second most likely activity to receive a budget increase of any size, after email marketing campaigns.

Using the scale below, please indicate whether your company is planning to increase or decrease your promotional marketing budget for the following activities in the next 3-4 years?



Elsevier’s Conlon made the case for using the platforms more, explaining, “The expanding role of social media within the medical community marks a pivotal change in how HCPs interact, learn and collaborate.” In addition, he argues the shift in physicians’ behaviour shows the need to strategically enhance investment in social media channels. By doing so, they can effectively engage with these “vibrant communities, offering insights and resources that are aligned with the physicians’ quest for knowledge and peer support”. His belief is that such targeted investments promise to foster stronger connections with HCPs, elevating the quality and impact of discourse on these platforms.

While there are a few leading HCP-specific social networks being used regionally, globally LinkedIn is the social media platform of choice for HCP engagement, with experts explaining how it allows targeted promotions to drive traffic to events. Jameel named YouTube as another platform where Novo Nordisk has achieved good results by running adverts for events before medical education videos. The focus on LinkedIn and YouTube is aligned with where physicians congregate online, with an Elsevier survey finding they are two of the three most widely used platforms.⁶ WhatsApp is the third.

“THE EXPANDING ROLE OF SOCIAL MEDIA WITHIN THE MEDICAL COMMUNITY MARKS A PIVOTAL CHANGE IN HOW HEALTHCARE PROFESSIONALS INTERACT, LEARN AND COLLABORATE.”

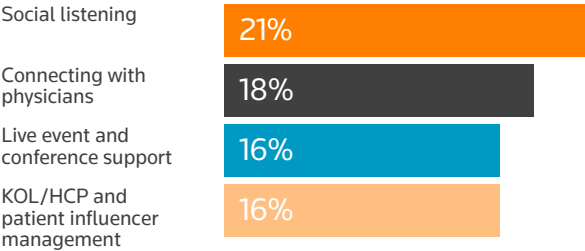
Denis Conlon, VP, Global Marketing, Elsevier, Pharma and Life Sciences Solutions

ASK THE EXPERTS

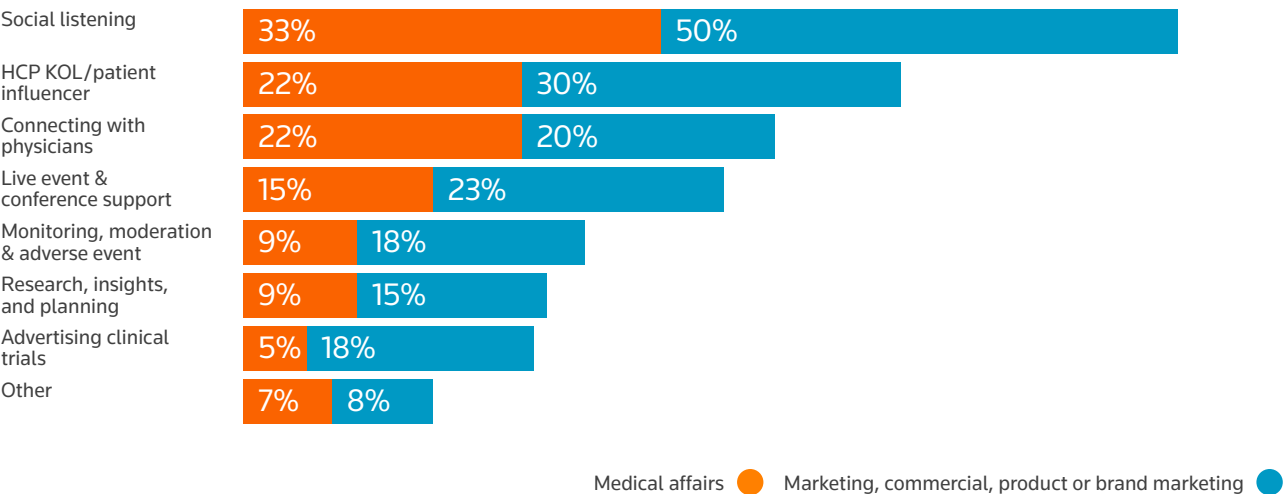
Q. How are you approaching the engagement of HCPs on social media?

The survey found social listening is the top social media activity in 2024, as it was in 2023, but the proportion of people engaging in the activity fell by more than 10 percentage points. The other main shift is a drop in the number of people who are engaging with HCP key opinion leaders (KOL) or patient influencers, an activity that tied for third place with live event and conference support in the latest survey.

What type of activities are you doing on social media in 2024?



What type of activities are you doing on social media in 2023? (Select all that apply)



A. "HCPs are more and more comfortable to get their content on LinkedIn, or in some areas even on TikTok or on Twitter/X. LinkedIn seems to be quite a handy way to reach out to HCPs. For wider audiences, the likes of Instagram or Twitter seem to be well rounded but it varies depending on the content, on the specifics of the disease you are addressing. I haven't seen great things on Snapchat or on BeReal. Facebook is outdated."

Susana Bento, Global Omnichannel Operations Lead, Grünenthal

A. "LinkedIn is probably the biggest channel that we're using from a social media perspective, because a lot of HCPs are on LinkedIn and we can do pretty targeted advertisements. We have very clear policies around LinkedIn and we've found it to be a reasonably effective channel. It's been useful, particularly if we want to market an event that we have coming up."

Dan Johnson, Head of BU GI, Neuroscience, Vaccines and Established Brands Switzerland, Takeda

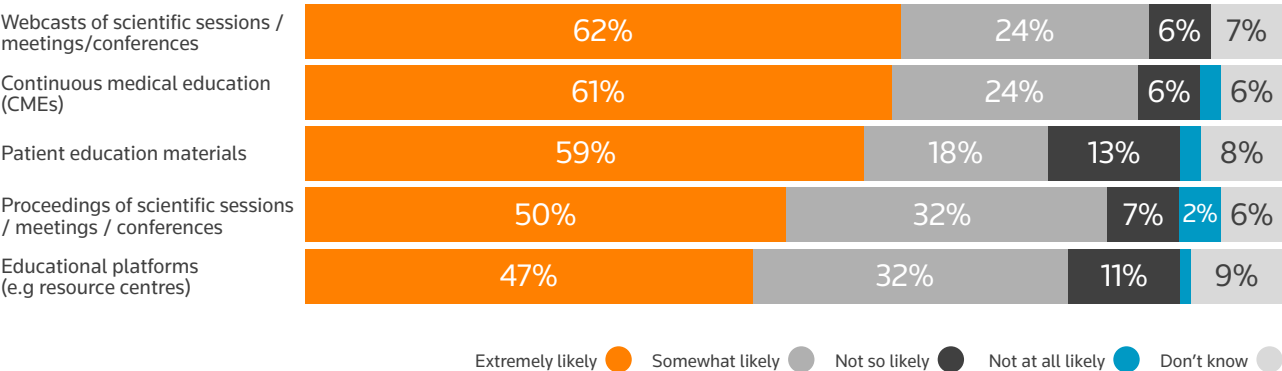
A. "I use social media around events. We're driving traffic with pre- and post-engagements of customers. We use our corporate channels to drive people to digital twins of our congress booths as we promote events. Afterwards, we share videos that we take at the congress and so forth. That's our standard. We are actually scaling it back a little bit this year because it was too much."

Alexander Frenzel, Multi-Channel Marketing Lead, Global Business Franchise Fertility, Merck KGaA

EDUCATIONAL ACTIVITIES

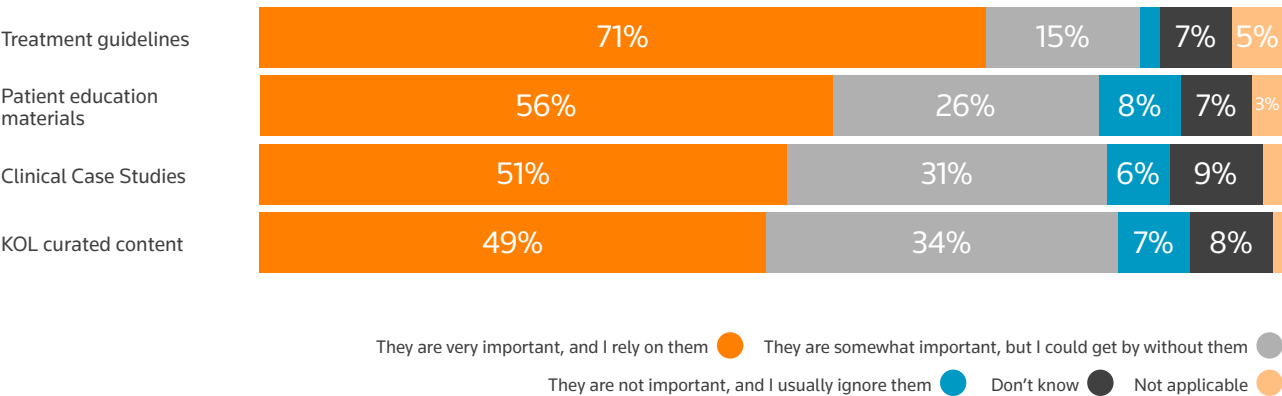
Findings from the survey show companies continuing to invest in medical education and largely sticking with the areas they prioritised in 2023. The top five areas of investment were the same in 2023 and 2024 but the order changed; the proportion of people likely to spend on continuous medical education (CME) fell and webcasts of scientific events claimed the top spot.

How likely are you to invest in 2024 in the following medical educational products?



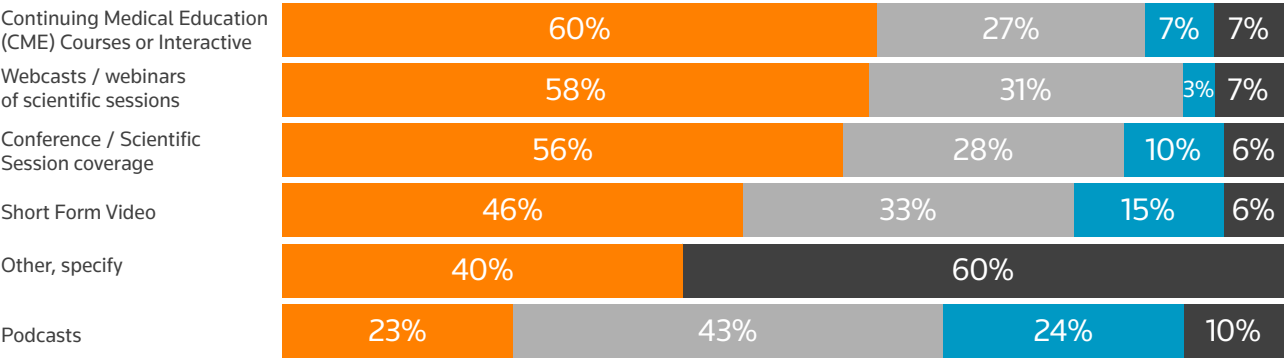
The survey results align to findings about HCP channel preferences. A 2023 survey of HCPs found workshops and in-person and virtual congresses were among the most important channels for accessing scientific content.¹ Similarly, the industry’s belief that treatment guidelines are particularly important to HCPs is validated by physician surveys.²

For each of the types of written educational content listed below, could you evaluate their effectiveness and informativeness for HCPs?



In other areas, there are slight disconnects between what the industry thinks HCPs want and what HCPs say they want. A HCP survey found short videos are the second most in demand type of content, behind short-form text.¹ Almost half of respondents to our survey said short-form video is very effective, putting it behind longer-form communication while still showing it is an important medium. Short-form videos ranked first, followed by scientific session webcasts, in our earlier survey. The findings suggest more data is needed and a mix of formats are required to meet the specific needs of different physicians.

For each of the types of mixed media educational content listed below, could you evaluate their effectiveness and informativeness for HCPs?

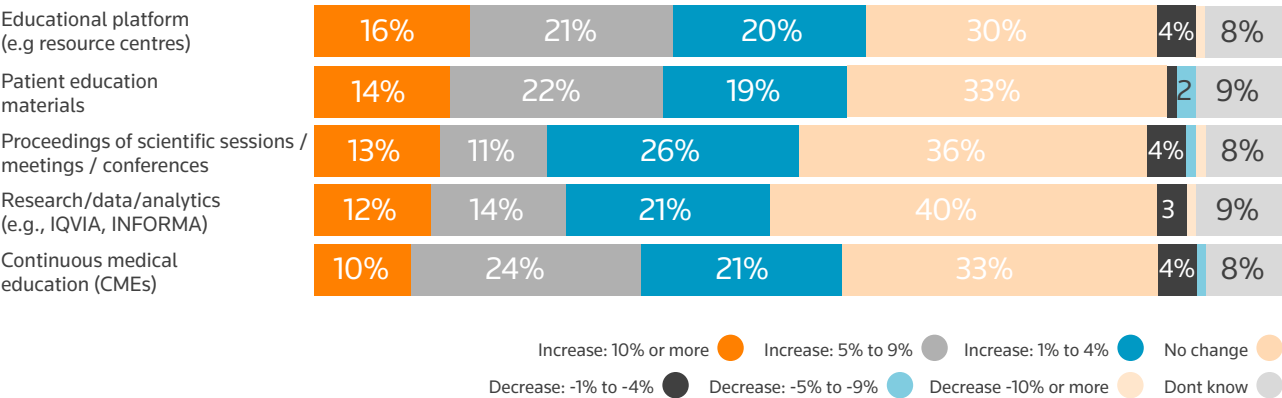


They are very important, and I rely on them ● They are somewhat important, but I could get by without them ●
They are not important, and I usually ignore them ● Don't know ●



Looking ahead, education platforms, patient education materials and continuing medical education (CME) were again the three areas most likely to receive increased investment in the coming years. Education platforms, such as resource centres, and patient education materials led the way, with respectively 57% and 55% of respondents predicting they will increase spending in the next three to four years. These two areas are also the most likely activities to receive budget increases of 10% or more in the coming years.

Using the scale below, please indicate whether you are planning to increase or decrease your medical educational budget for the following activities in the next 3-4 years?

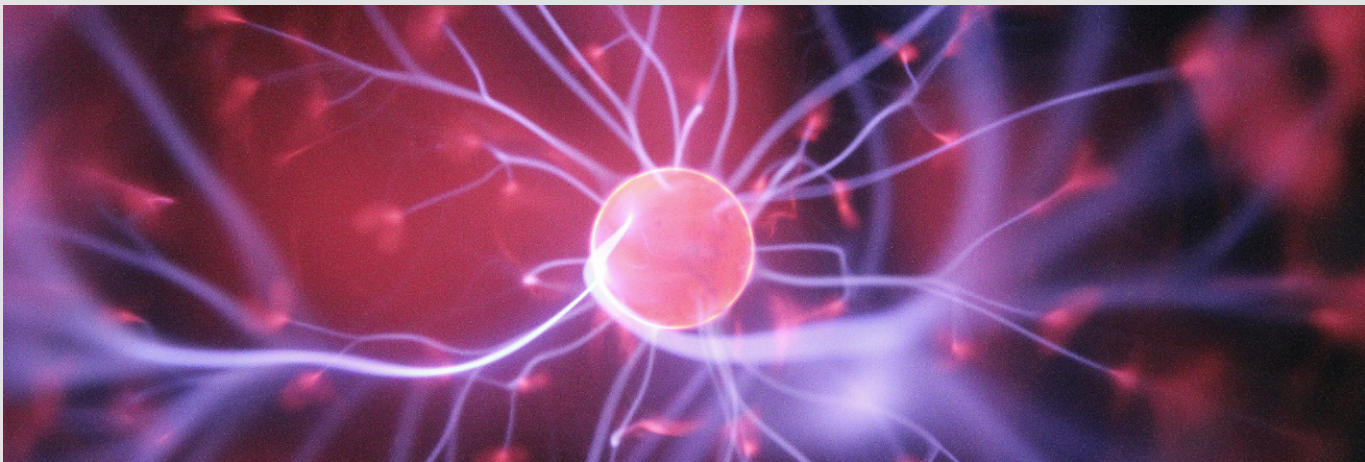


Sharon Levi, Business Insights Director, Global Commercial Sales and Marketing at Elsevier, says the expectation that education platforms and patient education materials will see the biggest increases in budget in the next three to four years seems logical, and in line with current trends in healthcare.

“Digital platforms offer scalable, accessible and diverse ways to provide education. They can be continuously updated with the latest information, making them a valuable resource for both HCPs and patients. These formats align well with the current trends toward digitalisation, global accessibility and the preference for engaging and multimedia content,” says Levi. “Additionally, they offer opportunities for more personalised, flexible and on-demand learning, which are highly valued in today’s fast-paced medical environment.”

In the omnichannel era, digital education platforms are part of an interconnected set of channels that allow companies to connect with physicians and monitor interactions. Johnson gave an example of the integration of channels in action at Takeda.

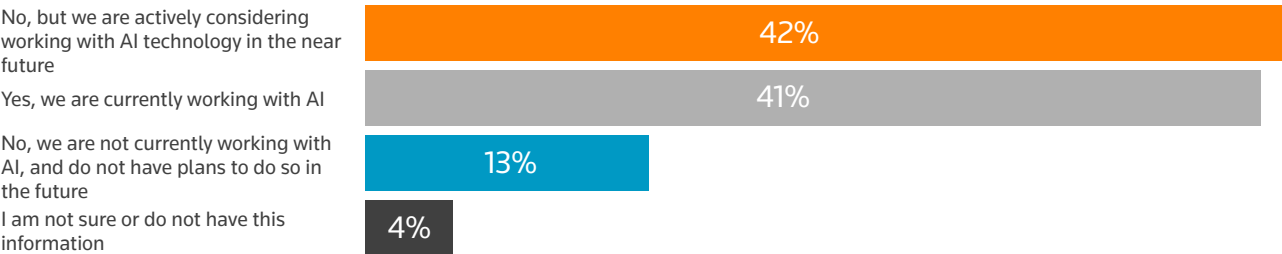
“We have an ADHD hub that has been proven really effective and is becoming a very concrete data source for us to show, ‘Okay, we know we had a face-to-face interaction, we know they have been on the ADHD hub, we know they’ve watched these videos’. We then know we should be following up, and so the whole process becomes more interconnected,” Johnson says.



ARTIFICIAL INTELLIGENCE

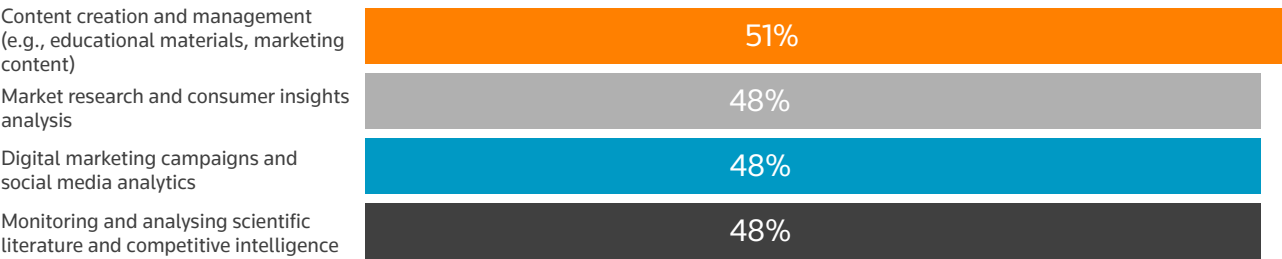
The 2024 survey shows that AI is starting to make its mark on HCP engagement. Over 80% of marketing and medical affairs teams are either already working with AI or actively considering using the technology in the near future.

Is your marketing or medical affairs teams currently working with AI, and if so, in what capacity?



Content creation and management is the most common use case for AI, according to the survey. The finding reflects the potential for AI to streamline the process of generating drafts, suggesting improvements and helping to optimise and personalise content for different platforms and audiences, including people who speak different languages. Market research and consumer insights analysis, digital marketing campaigns and social media analytics, and monitoring and analysing scientific literature and competitive intelligence tied for second place.

In which of the following areas related to marketing and medical affairs does your organization currently utilize AI tools?



Elsevier’s Conlon explains that the advent of AI in medical publishing is enabling marketers and medical affairs professionals to tailor content dynamically for diverse physician audiences. Using AI algorithms, teams can analyse complex datasets to understand and predict the unique preferences and needs of different medical specialists.

“This capability not only enhances content relevance and engagement but also seamlessly integrates with an omnichannel marketing approach, ensuring consistent and personalised communication across various platforms,” says Conlon. “The result is a more informed, engaged and responsive physician community, benefiting from targeted insights and information crafted to support their specific clinical interests and patient care objectives.” The survey reveals that the industry has a similar vision for AI.

At Novo Nordisk, Jameel’s team is putting AI into action and has guidance for how to use ChatGPT to create content. The initial focus is on creating written content for emails but he also sees video and podcasts as potential future use cases.

Grünenthal’s Bento shares additional insights on how AI is enabling omnichannel. The foundations of successful omnichannel campaigns are unchanged. Companies still need to explore synergies between channels, tell a story in a logical sequence and have a positive impact on the customer. The difference is how compliantly captured data and AI combine to personalise and automate the customer journey.

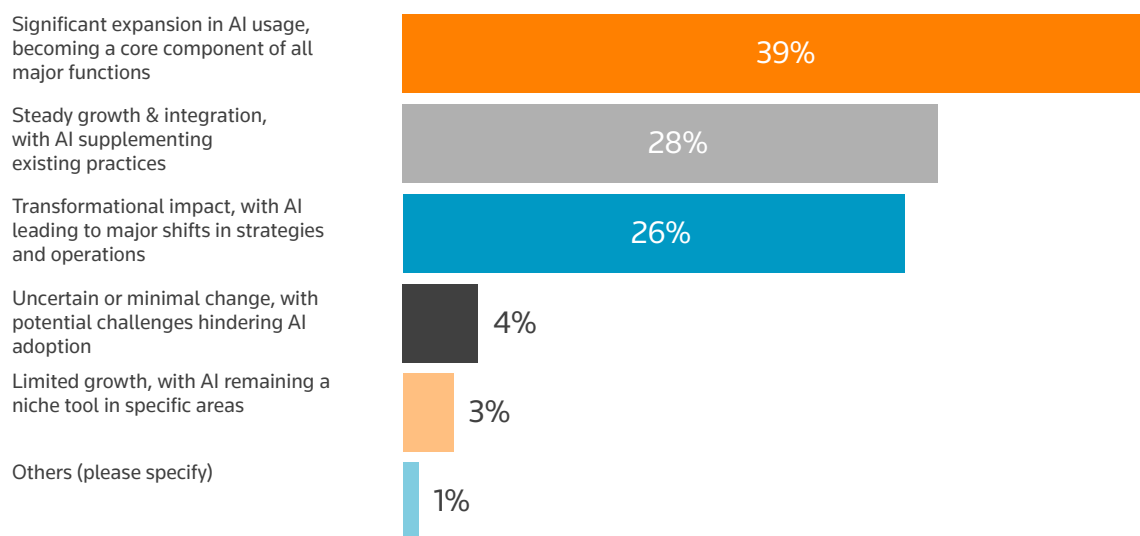
“I know that after a rep visit Dr. X will receive an email. That email will take him to a landing page or to a website and that website will invite him to attend the webinar, which will be followed by another email and eventually a rep or a MSL interaction. This orchestration, which at the end is what structures your customer experience, can be automated in most cases,” says Bento.

Approximately what percentage of the tools and services currently offered by your organization to physicians incorporates AI technology or assistance?



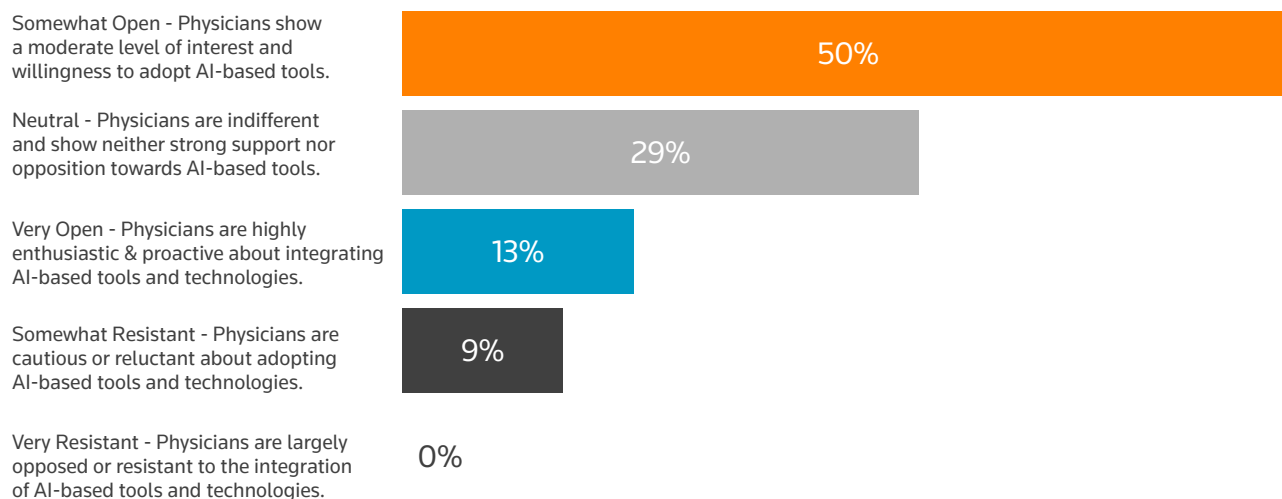
The adoption of AI is in its infancy, with most respondents saying less than 20% of the tools and services they provide to physicians incorporate the technology. Nevertheless, the direction of travel is clear. Almost 40% of respondents to our survey expect AI to become a core component of all major functions. One in four respondents say AI will have a transformational impact and drive major shifts in strategies and operations.

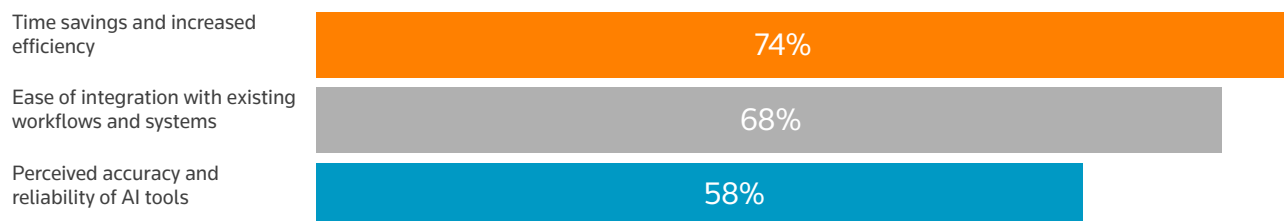
How do you envision the role of AI evolving in pharma marketing and medical affairs over the next 5 years?



Companies believe less than 10% of physicians are resistant to the technology. The belief that HCPs are open to AI and judge the tools based on their efficiency, accuracy and reliability is supported by surveys of physicians. While there are high levels of excitement about the technology, concerns about the consistency of the nascent technology remain.^{7,8}

How would you rate the general appetite and openness of physicians towards adopting AI-based tools and technologies?



What do you believe are the key factors that influence physicians' willingness to embrace AI tools in their practice?

Elsevier's Levi explains how AI may benefit HCPs: "AI tools that can streamline workflows, reduce administrative burdens and assist in clinical decision-making can be highly attractive for saving time and increasing efficiency. Time saved through AI can be redirected towards patient care, allowing physicians to spend more time with their patients, thus potentially improving care quality and patient satisfaction."

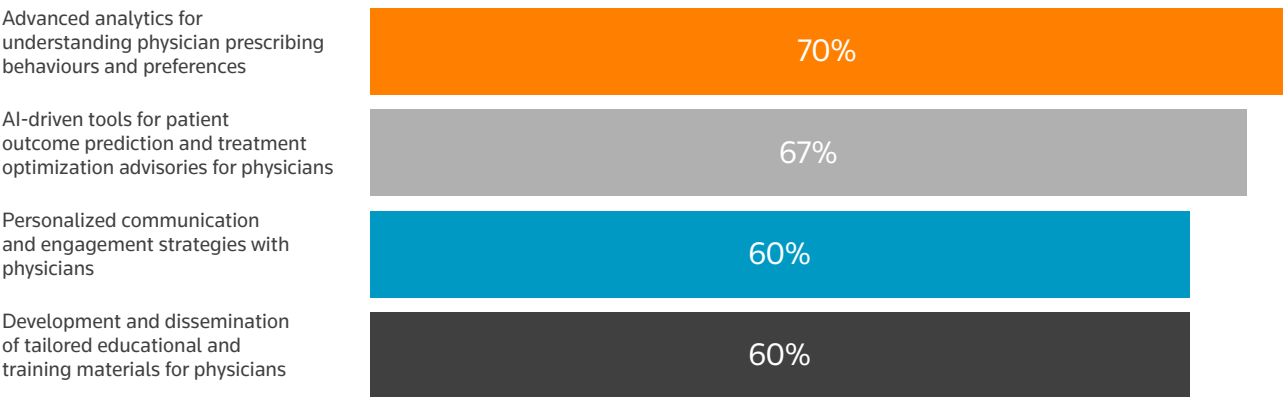


ASK THE EXPERTS

Q. How are you using AI in physician-facing marketing or medical affairs?

Survey findings show marketing and medical affairs professionals have the highest hopes for AI in personalised HCP communication and engagement strategies, advanced analytics for understanding prescribing behaviours, and predicting patient outcomes and optimising treatment

For which of the following applications do you foresee AI tools being most important in the context of pharma marketing and medical affairs, specifically with respect to physicians?



A. “Fine tuning segmentation and targeting. Being able to profile customers, create audiences, design personas, and use those personas and those audiences to drive a campaign. That’s a classic usage.”

Susana Bento, Global Omnichannel Operations Lead, Grünenthal

A. “We have a lot of pilots going on right now. We are looking at how we can use AI for analysis and help us do the right allocation of channels for different HCP segments. That is a big focus, common to medical and marketing.”

Fahad Jameel, Senior Director - Medical Excellence, Region North West Europe, Novo Nordisk

A. “We’re really going deeper into the data that we have internally from all of our sources. We’re trying to predict which content is working most effectively, through which channels, for which HCP. It’s about looking back at our data and identifying the micro-segments or the specific things that have driven outcomes to learn what we should be doing more of and what we should be doing less of. Bringing the personalisation of content to life through AI is where we’re really focused right now.”

Dan Johnson, Head of BU GI, Neuroscience, Vaccines and Established Brands Switzerland, Takeda

THE FUTURE OF HCP ENGAGEMENT

Asked about the future of marketing and medical affairs, experts predict everything from incremental improvements in current practices to AI-powered social media avatars. Teams are optimising workflows that emerged relatively recently with the onset of the omnichannel era, while keeping track of potentially disruptive technological developments on the horizon.

Johnson expects to continue investing more heavily in digital while “very strongly rationalising” congress attendance. Takeda is working with AI technologies that could reveal the best uses of its marketing budget, enabling the company to maximise the impact of its spending, but for now Johnson faces “a bit of a balancing act”. AI may soon show some channels to be an inefficient use of spend money but Takeda needs to be competitive today, and that means continuing to invest in areas it believes have worked in the past.

The focus on analytics extends to social media, where Johnson thinks there are probably opportunities for data mining that Takeda is yet to fully explore. Takeda has sourced and cleaned data over the past year with a view to learning how it can improve activities such as targeting on LinkedIn.

Merck KGaA's Frenzel noted the potential for AI avatars to start participating in social media, citing his research student's work on digital influencers to show how the online

world could change. AI technologies are already creating social media posts behind the scenes but digital influencers make the role of technology explicit. He is also interested in how AI can continue to change content production.

“In the production of social media content we're struggling with having actors that are diverse enough. That's one thing that I am looking into, to see whether we can basically produce our content using AI,” says Frenzel.

Questions remain. Will the potent mix of new technologies change how healthcare is delivered, and what other forces might combine to force a fundamental shift in how companies engage HCPs? Johnson thinks significant change is coming.

“At some point in time, the model that we're currently running is going to run its course and we'll need to find a new way of operating, or at least shift to meet that change. I don't exactly know what that looks like but I do think it's bubbling away in the background. In 10 years' time, I'm not sure we're going to be talking about how to optimise the subject line of an email,” Johnson says.

Beneath the fast changes and uncertain future, companies can still rely on some tried-and-trusted ideas. Bento, an advocate of AI and technology, stresses the need for a “delicate balance” between “new toys” and the basics of HCP engagement.

Companies still need to know their customers, understand their needs, and provide them with the right content and the right experience. That means understanding the consumption preferences of HCPs. With that foundation in place, marketing and medical affairs professionals can use new technologies to optimise and automate processes that maximise the impact of their investments in HCP engagement.

ABOUT REUTERS EVENTS

The pharmaceutical division at Reuters Events strives to make Pharma more open and valued. More open so that the strongest ideas and insights are brought to the fore in a transparent, trustworthy manner. More valued by taking an authentic approach to building products and services that matter to patients. To do this, Reuters Events provides a hub for senior-level Pharma executives, patient groups and other health stakeholders to exchange ideas and observe shifting trends and practices. We actively respond to the aims and interests of our audience, so please get in touch.

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Nick Taylor

THANKS

Reuters Events Pharma spoke to pharmaceutical industry leaders from marketing, commercial, product branding and medical affairs functions to gain deeper insights into HCP engagement trends in 2024 and cited them within this paper. Many thanks to:

- Alexander Frenzel, Multi-Channel Marketing Lead, Global Business Franchise Fertility at Merck KGaA
- Dan Johnson, Head of BU GI, Neuroscience, Vaccines and Established Brands Switzerland at Takeda
- Fahad Jameel, Senior Director - Medical Excellence, Region North West Europe at Novo Nordisk
- Susana Bento, Global Omnichannel Operations Lead at Grünenthal
- Denis Conlon, VP, Global Marketing, Elsevier, Pharma and Life Sciences Solutions
- Sharon Levi, Business Insights Director, Global Commercial Sales and Marketing at Elsevier

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