



Omnichannel HCP Engagement Research 2023

Insights for discussion with subject matter experts in

Marketing, Commercial and Product/Branding and Medical
Affairs

Survey population

We surveyed 208 pharma, biotech and medtech executives globally working in medical affairs, marketing, commercial strategy and product or brand marketing. We filtered respondents based on seniority, including those at manager level and above, resulting in a sample size of 198 respondents.

Geographical responsibility

We asked executives around the globe to take part in our latest industry trends research, focusing on those with responsibilities for regions that include North America, Europe and Asia Pacific. Regions are usually not exclusive.

Which **regions** or countries are you responsible for in your current role? (Select all that apply)

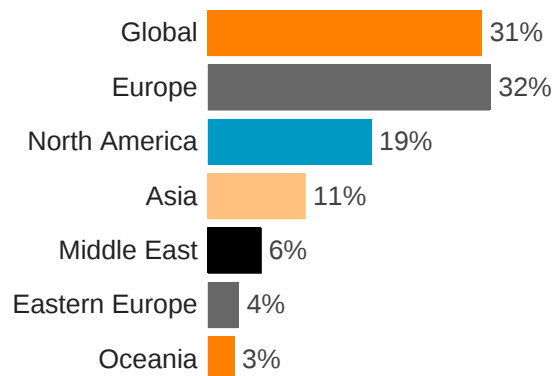
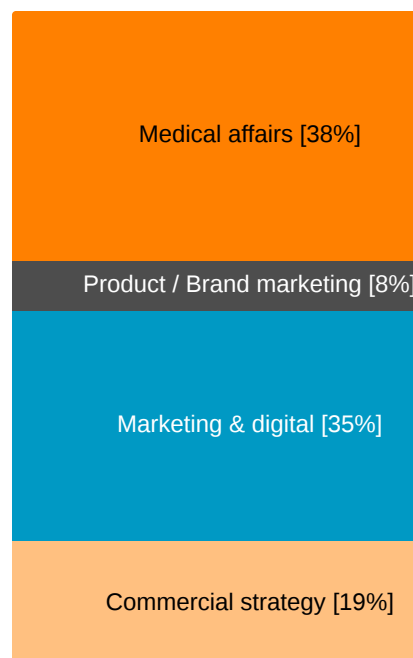


Figure shows the percentage of respondents making a selection, not the percentage of total selections made.

Functional responsibility

We selected executives working in marketing & digital, medical affairs, product/brand marketing and commercial strategy.

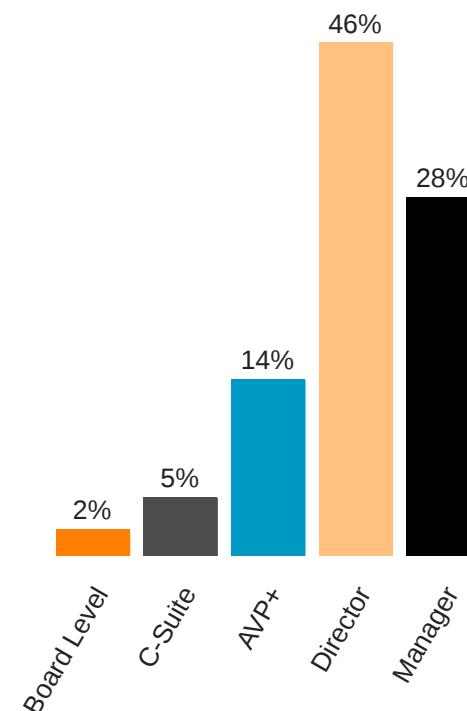
What **function** are you most closely aligned with? (Select one only)



Seniority

We surveyed managers, directors and upwards.

Which of the following best describes your **seniority**? (Select one only)

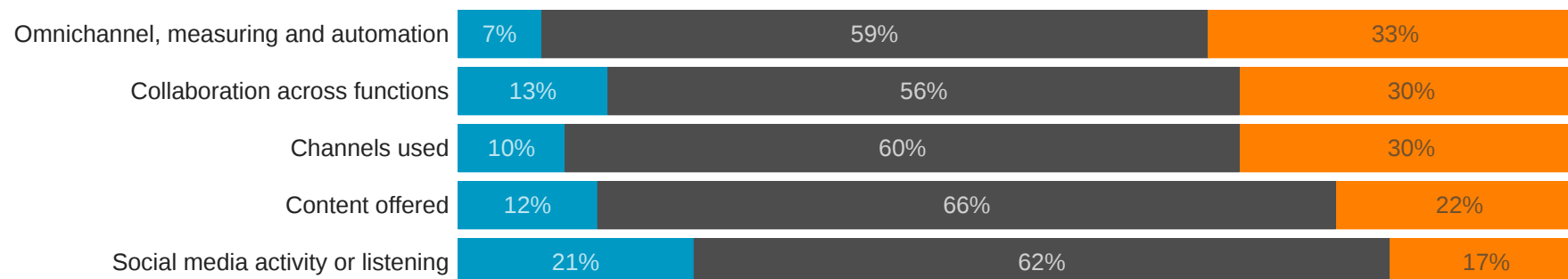


Latest trends in HCP engagement

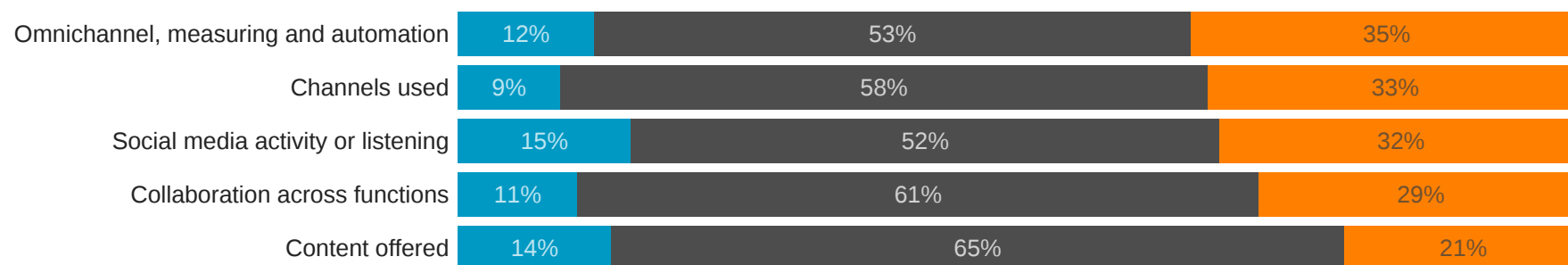
We wanted to know what respondents thought about the latest trends and developments in how pharma is engaging with HCPs in an omnichannel world.

*In the past 18 months, have you **witnessed changes** in how your particular **business function** within your company is engaging with HCPs?*

Marketing, Commercial and Product or Brand Marketers



Medical Affairs



● No change ● Some change ● Extreme change

Social media activities

We asked all respondents:

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

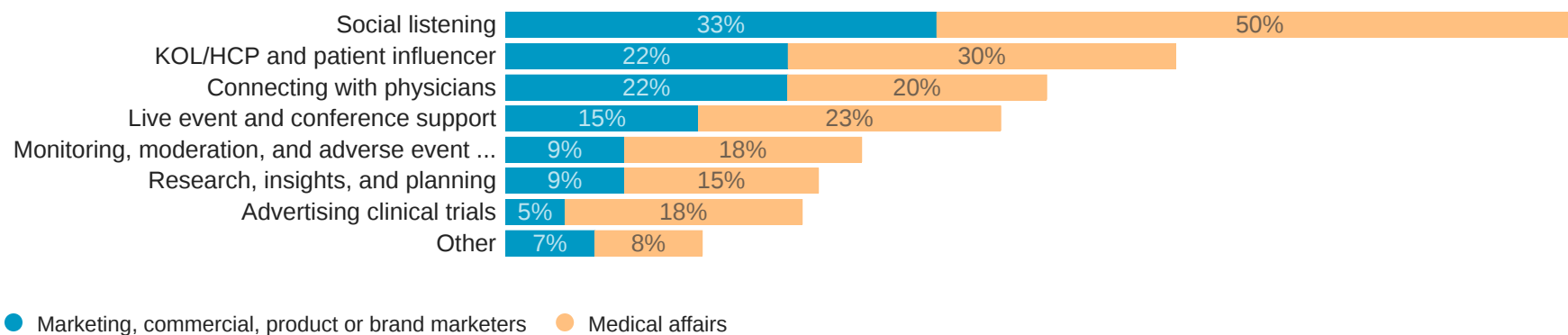


Figure shows the percentage of respondents making a selection, not the percentage of total selections made.

Collaboration across functions

We asked respondents who had seen at least some change in the level of collaboration across functions for HCP engagement:

To what **degree** are medical affairs, commercial and marketing teams **collaborating** to drive change in HCP engagement in 2023?

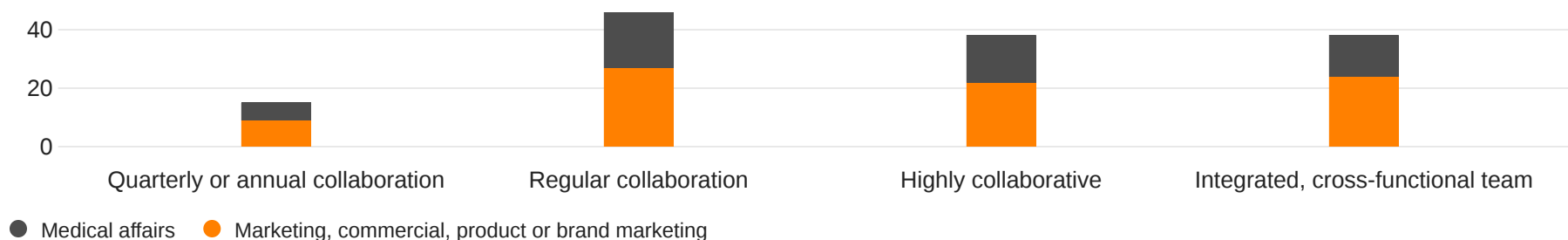
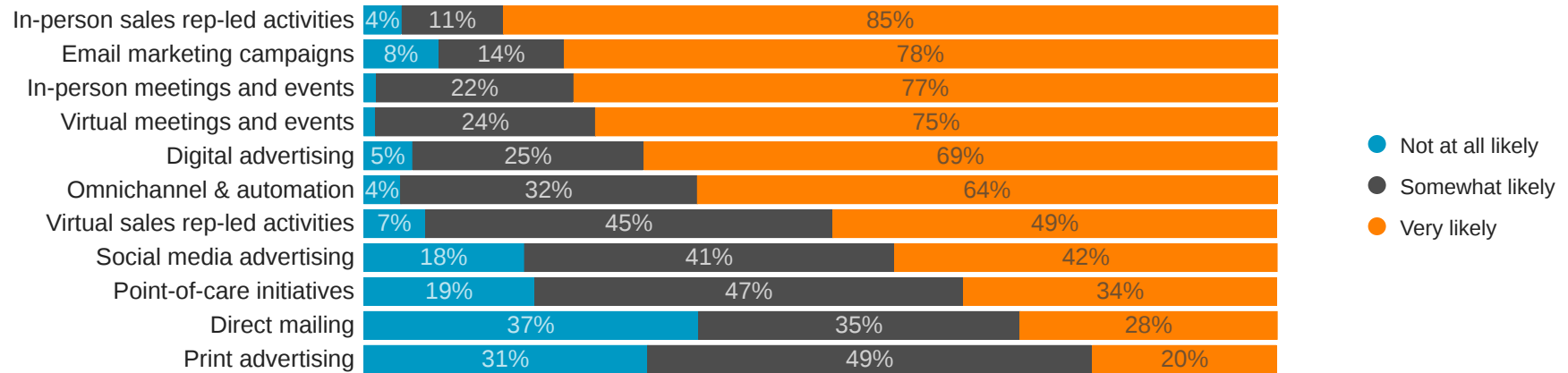


Figure shows the count of respondents who selected each category.

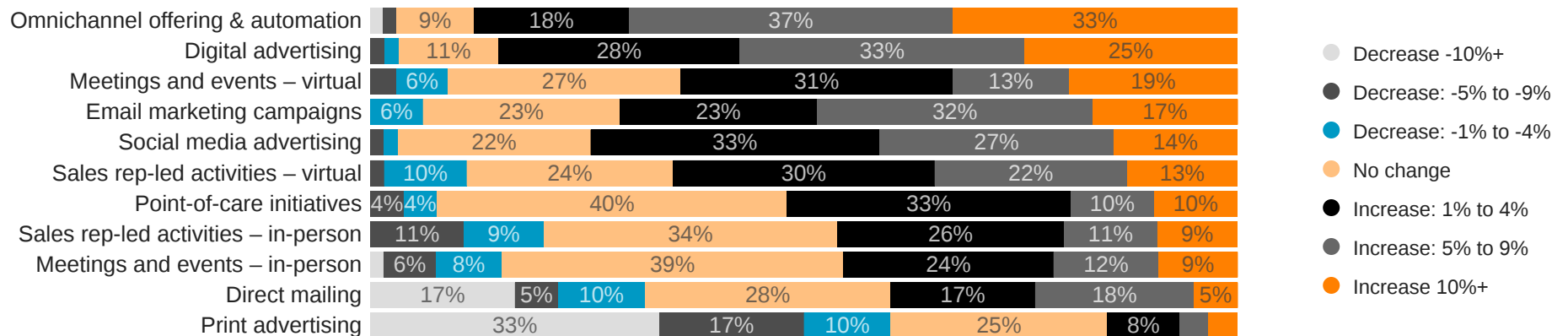
Promotional spending: overview

We asked those in marketing, commercial and product/ branding about their promotional spending expectations.

*How likely is your company to invest in **2023** in the following **promotional marketing channels**?*



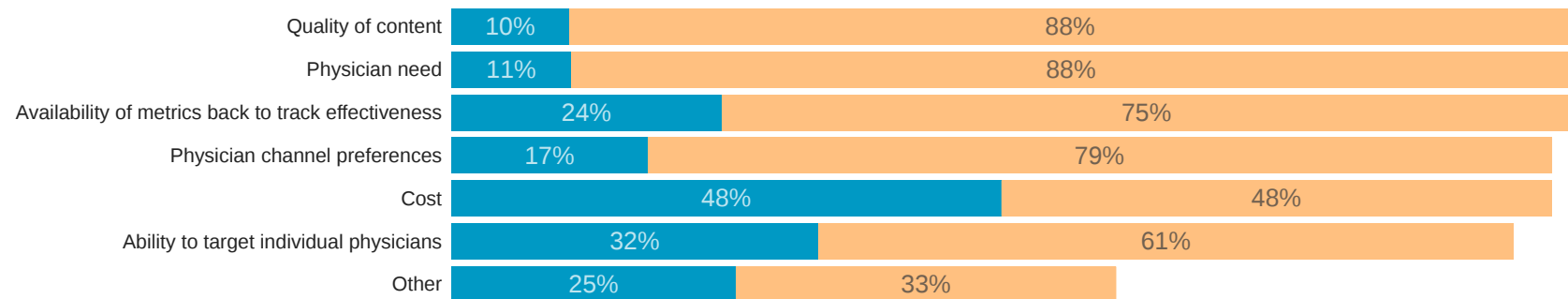
*Using the scale below, please indicate whether your company is planning to **increase or decrease** your promotional marketing budget for the following activities in the next **3-4 years**?*



Promotional activities: decision-making and influence

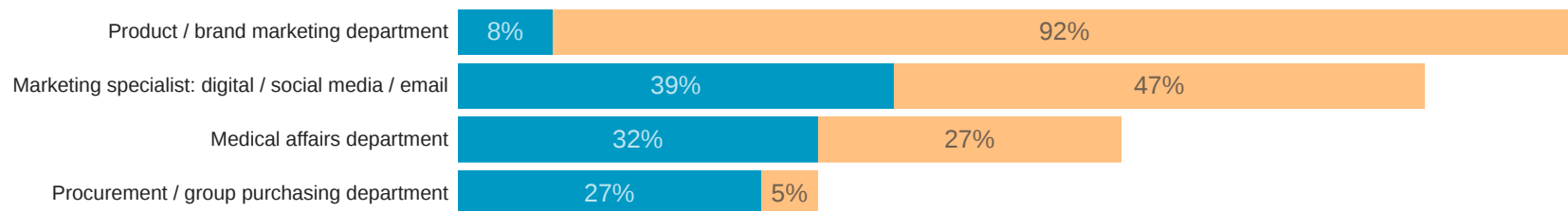
We asked those in marketing, commercial and product/ branding roles about what factors influence their promotional activities, and the influence of various departments over budget-related decisions.

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



● Somewhat important ● Very important

*Please indicate the level of **influence** the following departments have in budget-related decisions for promotional activities on a regional/local level.*



● Medium influence ● High influence

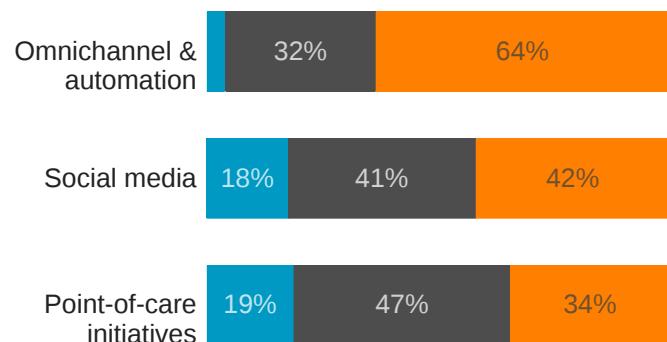
Promotional spending: traditional, digital and novel approaches

A deep dive into the data.

Investment in omnichannel engagement is very common and is set to increase between now and 2026. Respondents indicated that investment in omnichannel capabilities will experience the greatest increase in budget of all activities in this time period.

Omnichannel, Automation, Social Media and Point of Care Initiatives

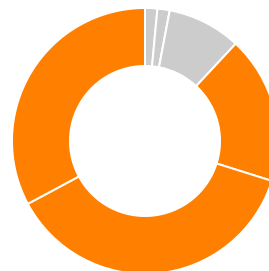
How likely is your company to invest in **2023** in the following **promotional marketing channels**?



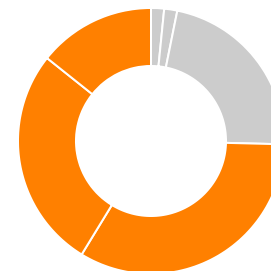
● Not at all likely / not so likely
 ● Somewhat likely
 ● Very likely / extremely likely

Respondents expecting budget to **increase** by 2026.

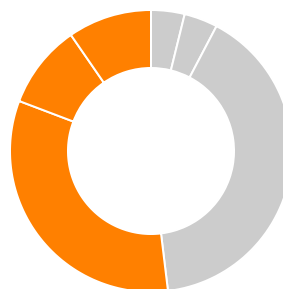
Omnichannel and automation: **88%**



Social media: **74%**



Point of care initiatives: **53%**



Data shows the percentage of respondents that expect a certain change in budget for each channel in the next 3-4 years. Orange is increase, grey is no change or decrease.

Promotional spending: traditional, digital and novel approaches, continued

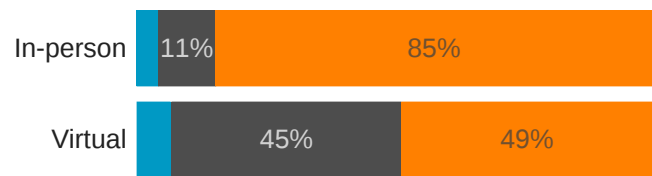
In-person sales rep-led activities are currently seeing significant investment, but budget increases over the next 3-4 years will be led by virtual sales rep-led activities. Email marketing is seeing significant investment currently, which is set to increase significantly by 2026, in direct contrast with direct/print mailers.

*How likely is your company to invest in **2023** in the following **promotional marketing channels**?*

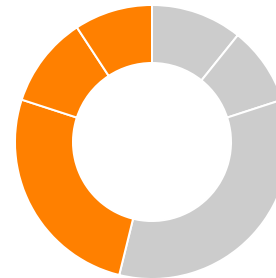
*Respondents expecting budget to **increase** by 2026.*

Sales rep-led activities

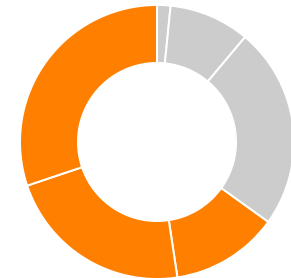
Percentage of Respondents Investing by Channel in 2023



In-person: **46%**

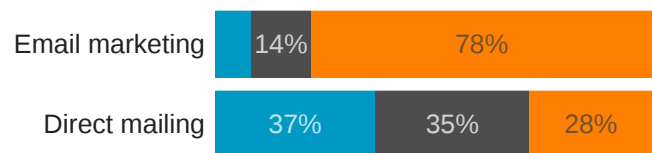


Virtual: **65%**

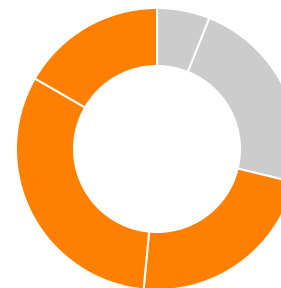


Mailings

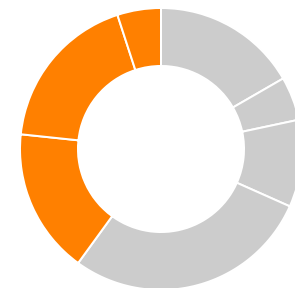
Percentage of Respondents Investing by Channel in 2023



Email marketing: **72%**



Direct mailing: **40%**



● Not at all likely / not so likely
 ● Somewhat likely
● Very likely / extremely likely

Data shows the percentage of respondents that expect a certain change in budget for each channel in the next 3-4 years. Orange is increase, grey is no change or decrease.

Promotional spending: traditional, digital and novel approaches, continued

Both in-person and virtual meetings and events are seeing investment in 2023, with in-person budgets set to remain relatively stable by 2026, and virtual event budgets set to increase. Digital advertising is currently seeing investment with budgets set to increase significantly by 2026, in direct contrast with print advertising.

*How likely is your company to invest in **2023** in the following **promotional marketing channels**?*

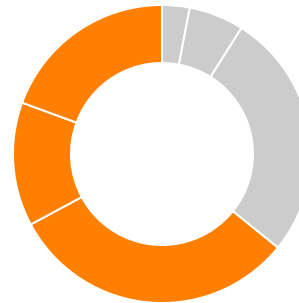
*Respondents expecting budget to **increase** by 2026.*

Meetings and Events

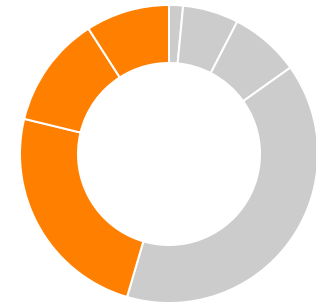
Percentage of Respondents Investing by Channel in 2023



Virtual: **63%**

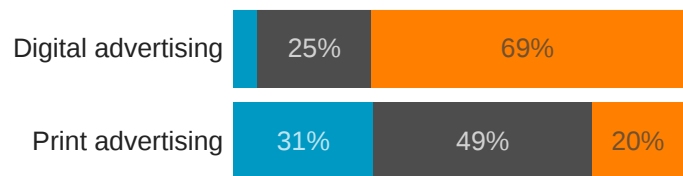


In-person: **45%**

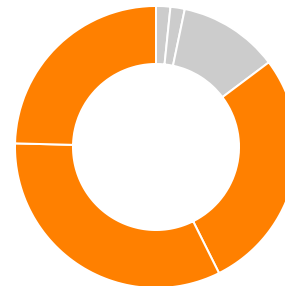


Advertising

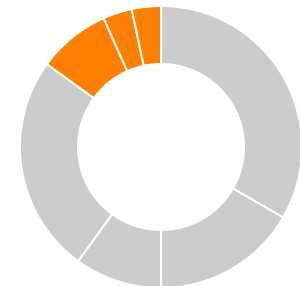
Percentage of Respondents Investing by Channel in 2023



Digital advertising: **86%**



Print Advertising: **14%**



- Not at all likely / not so likely
- Somewhat likely
- Very likely / extremely likely

Data shows the percentage of respondents that expect a certain change in budget for each channel in the next 3-4 years. Orange is increase, grey is no change or decrease.

Promotional spending: Print vs. Digital

We asked marketing, commercial and product or brand marketers to split out their promotional budgets into 'print' and 'digital' channels.

*How will you split out your **promotional budget** for **print and digital activities** in 2023 and 2026?*

2023



2026

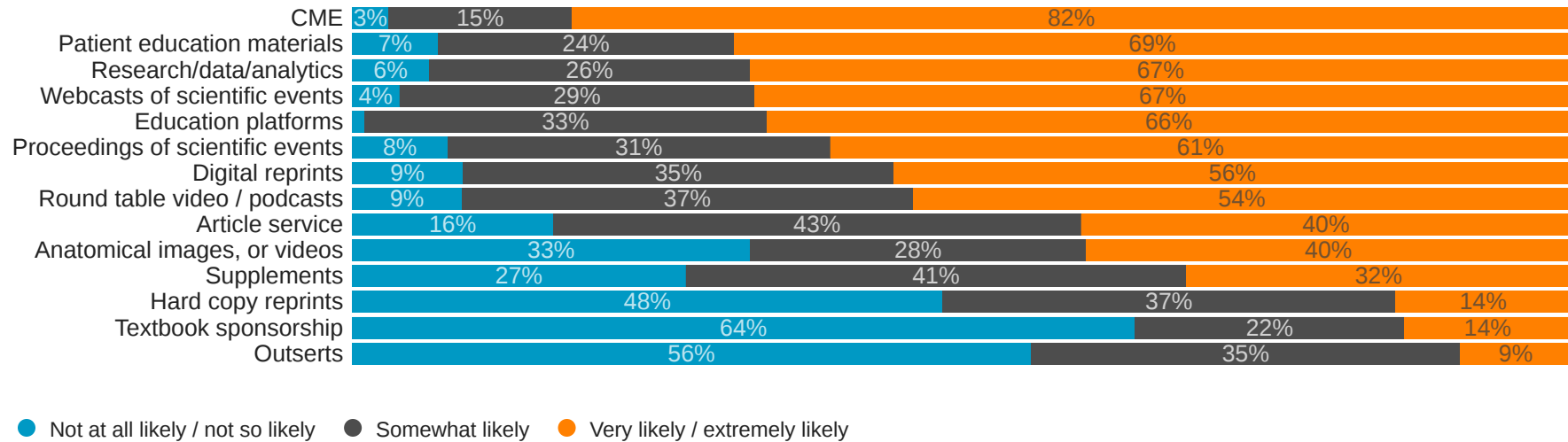


Educational activities: Marketing and medical affairs

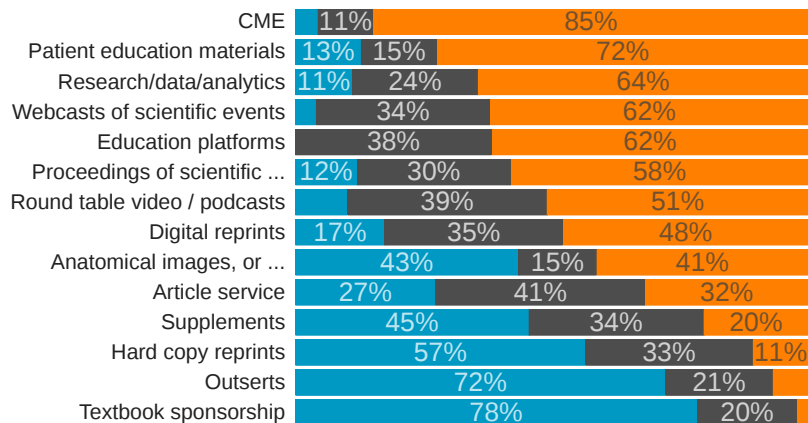
The analysis below reflects the results for both marketing and medical affairs functions.

How likely are you to invest in 2023 in the following **medical educational products**?

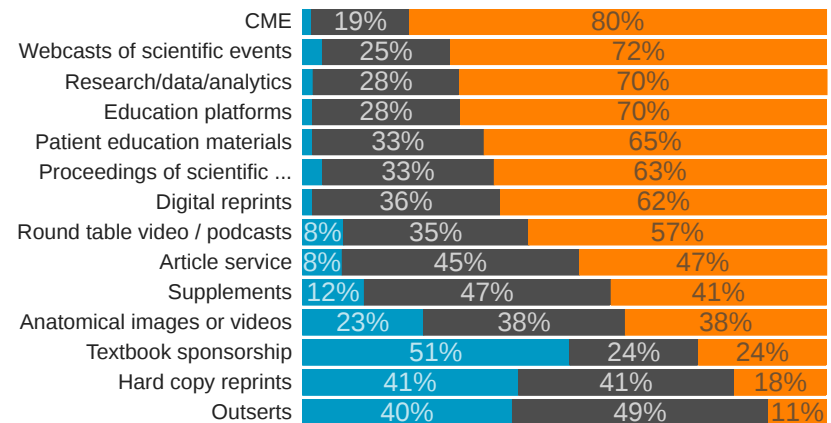
All Respondents



Medical Affairs



Marketing, Commercial, Product/Branding

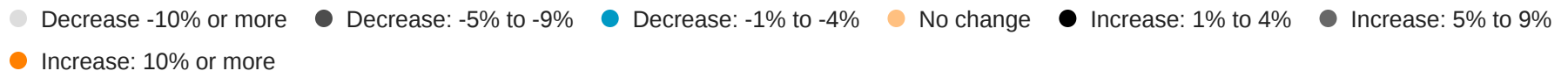
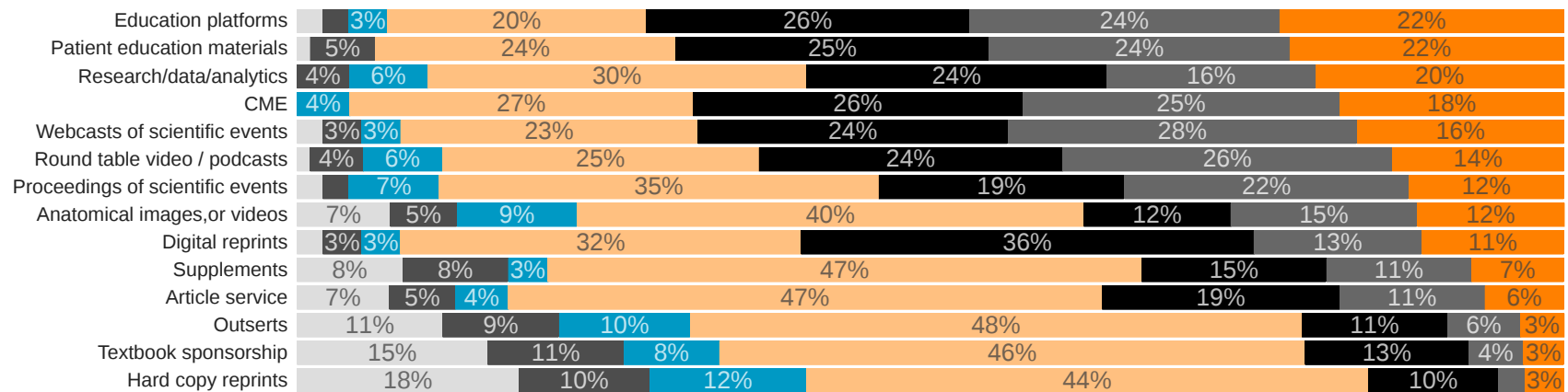


Educational spending: budget changes expected

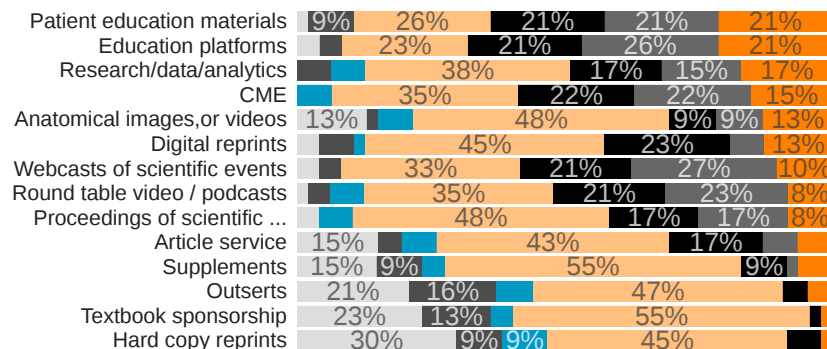
We asked all respondents about how they expect their educational budgets to change in the next 3-4 years.

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**?

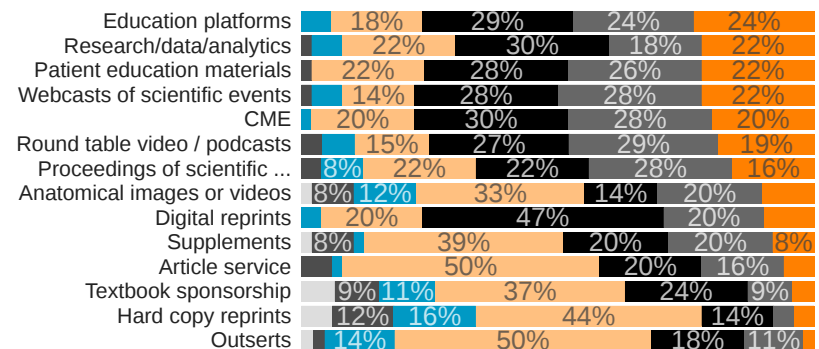
All Respondents



Medical Affairs



Marketing, Commercial, Product/Branding



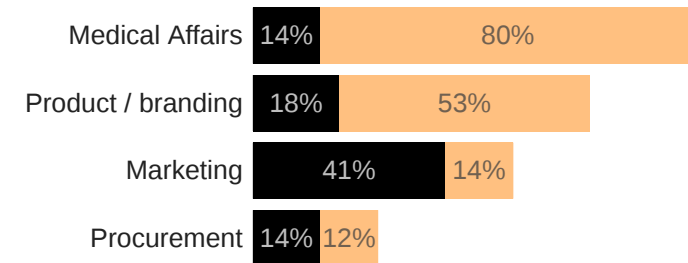
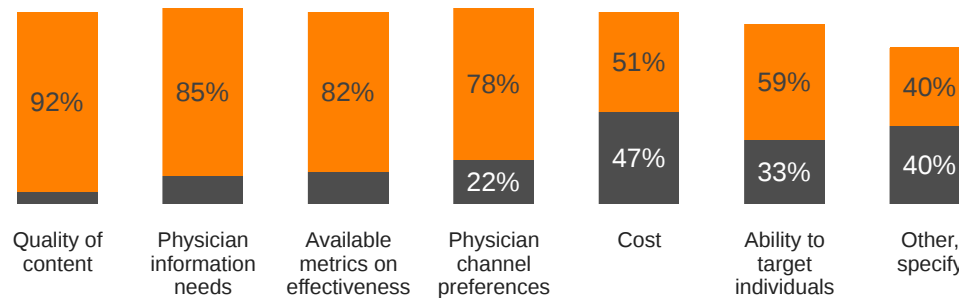
Educational activities: decision-making and influence

We asked all respondents about how they expect their educational budgets to change in the next 3-4 years.

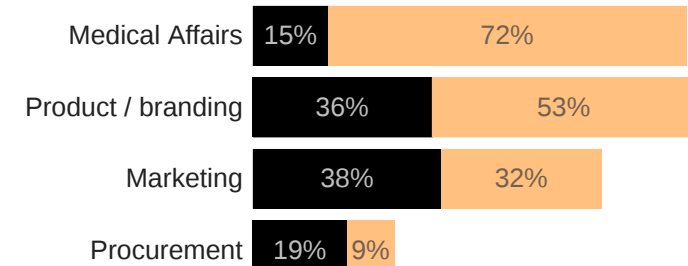
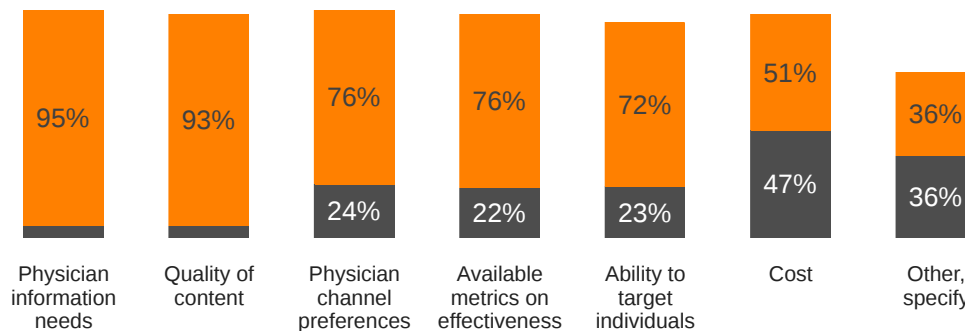
How important are the following factors in your **decision-making** process about **educational activities**?

Level of departmental **influence** in budget-related decisions for **educational activities**.

Medical Affairs



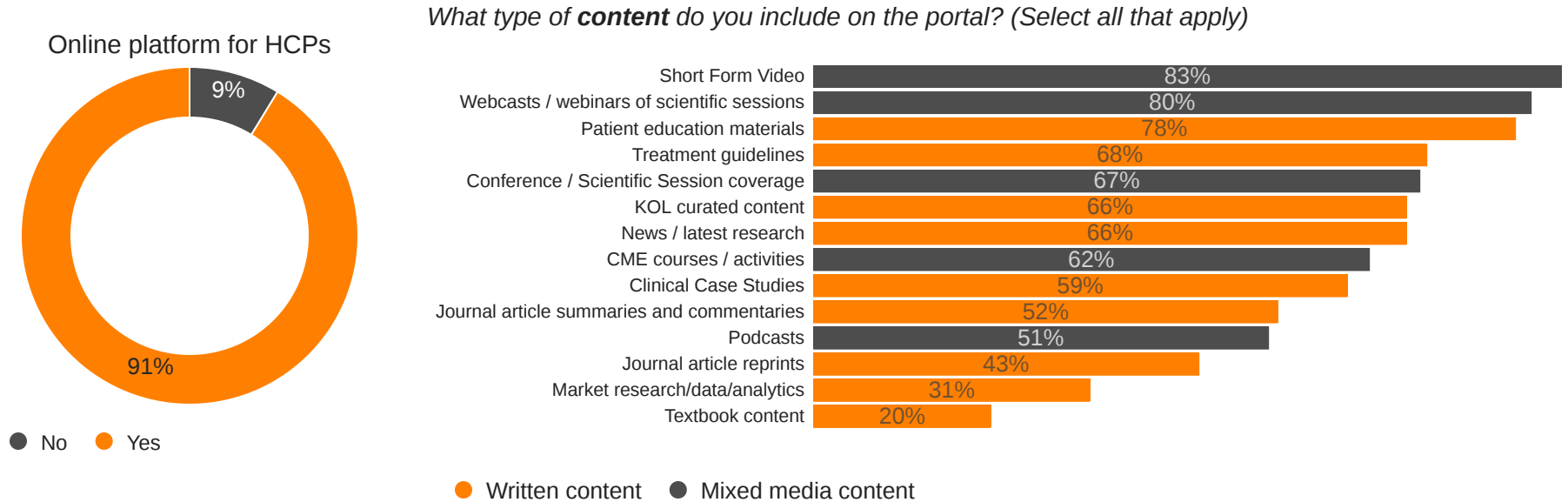
Marketing, Commercial and Product/Branding



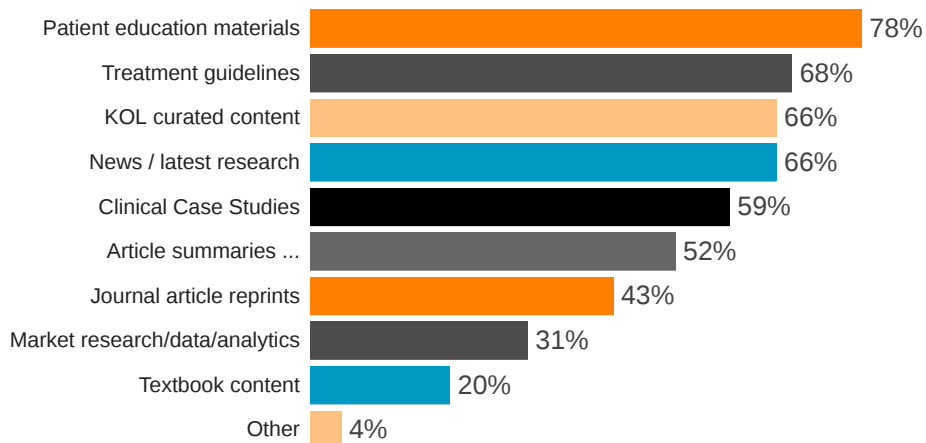
● Very important ● Somewhat important

● Medium influence ● High influence

91% of respondents have websites or online platforms/portals that provide healthcare professionals with **product-specific** or **disease-related** content. We asked them what kind of content they were hosting.



Written educational content ranked by popularity.



Mixed-media educational content ranked by popularity.

