



The "new" rules of engagement

How pharmaceutical companies can give HCPs the new and meaningful interactions they want.

Accenture Strategy & Consulting



About our Accenture Healthcare Provider Survey

With this survey, we sought to understand how healthcare provider (HCP) needs and expectations of pharmaceutical companies have evolved since the COVID-19 pandemic began, and which changes will have long-lasting implications for the way HCPs engage with pharma going forward.

Participants (N = 720)

The survey participants identified themselves as one of the following healthcare disciplines:

25%

General Practitioner

25%

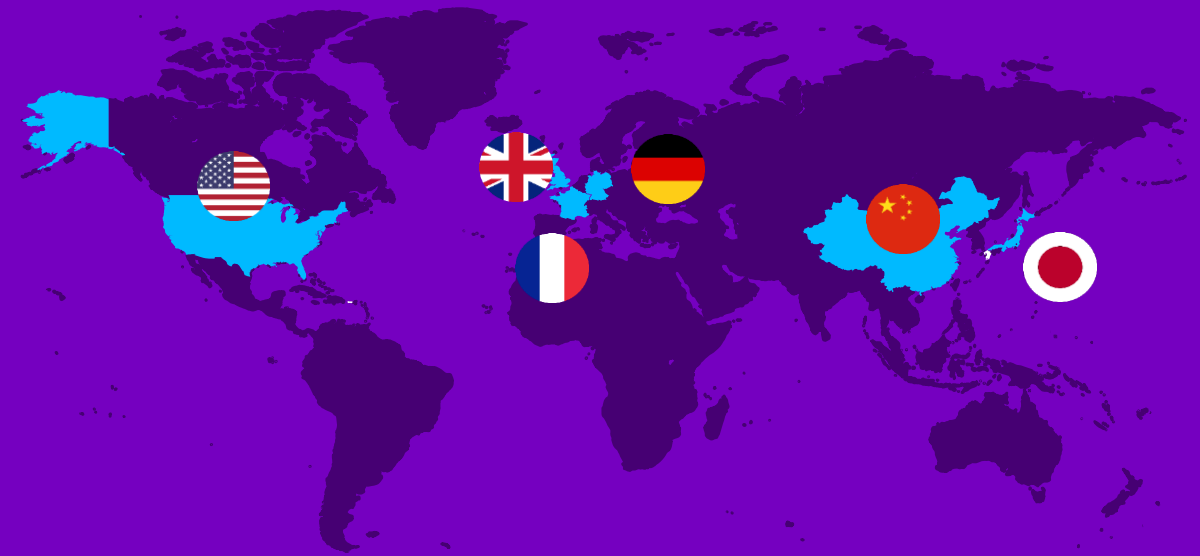
Oncologist

25%

Immunologist

25%

Cardiologist



Countries

120 participants from each country: USA, UK, France, Germany, China & Japan.

The survey data was collected in May-June 2021.

An evolution of engagement

In our [2020 survey](#), HCPs said that COVID-19 was driving lasting change in what they need and value and how they want to engage with pharmaceutical companies. They indicated that pharma companies had shown improvement in both relevance and the support services they provide.

A year later, HCPs said that while the improvements were sustained, they still feel that more can be done to better understand their needs and the needs of their patients.

HCPs reward those companies who demonstrate this understanding with more of their time and attention. This, coupled with the fact that HCPs are seeing fewer patients, reveals an opportunity for pharma companies to gain time, trust and influence with HCPs and their patients.



Pharmaceutical companies are shifting to better engage HCPs but providers want more.

#1 Key Finding

Pharma companies need to do more to better understand and meet the expectations of HCPs due to COVID-19.

#2 Key Finding

When pharma companies do more, they are recognized and rewarded by HCPs with more time and attention.

#3 Key Finding

HCPs most value connections that blend the best of virtual and in-person, focused on the needs of their patients.



#1 Key Finding

Pharma companies need to do more to better understand and meet the expectations of HCPs due to COVID-19.

Pharmaceutical companies are making strides towards more valuable and meaningful HCP interactions.

They are more considerate of HCP's most pressing needs

86%

of **HCPs** have seen **pharma companies change what they communicate about** beyond product information to be "truly helpful"

Their content resonates more now than before COVID-19

83%

of **HCPs** believe the **content they are receiving** from pharma companies today is **more relevant than before the COVID-19 crisis...**

33%

...with a **third** believing it is **far more relevant.**

However, truly helpful content is getting lost in the communications clutter

While new messages from pharma companies are welcome, healthcare providers are also receiving high volumes of less relevant digital content that is missing the mark.

65%

of HCPs feel at least one pharma company has “spammed” them with digital content as the COVID-19 pandemic has evolved.

77%

Almost 8 in 10 HCPs are seeing a greater volume of information from pharma companies than pre-COVID-19.

64%

of HCPs agree that the volume of digital communications they receive from pharma is too great.

2/3

Nearly two-thirds of HCPs agree that the volume of meetings they are invited to join is greater than they have time for.

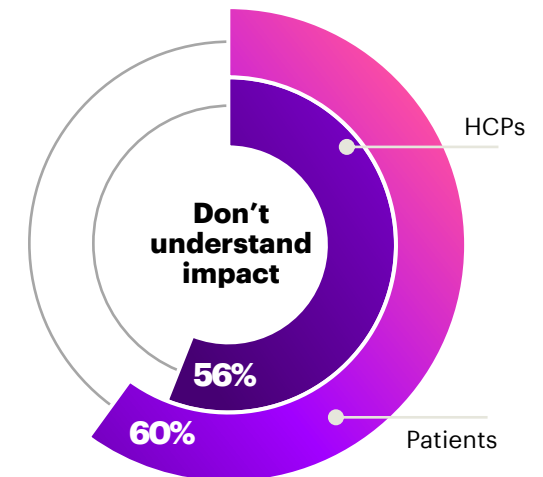
HCPs still believe pharma companies could do more to better understand their evolving needs.

Pharma companies are not grasping the full impact of COVID-19 on their customers

This gap in understanding is as pronounced today as a year ago

Almost **1 in 4** HCPs believe pharma companies **do not understand at all** or **understand insufficiently** their changing needs and expectations for patient treatment due to COVID-19.

Most HCPs maintain the impression that pharma companies are failing to understand the real impact of COVID-19 **on them (56%)** and **their patients (60%)**.





#2 Key Finding

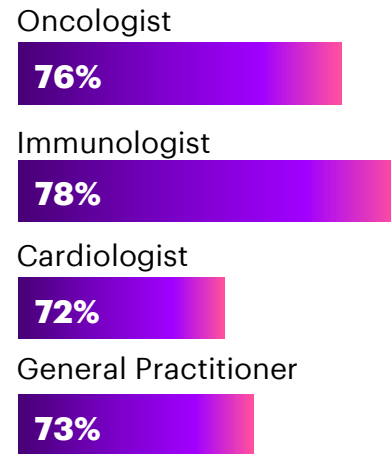
When pharma companies do more, they are recognized and rewarded by HCPs with more time and attention.

HCPs have more time available than before COVID-19.

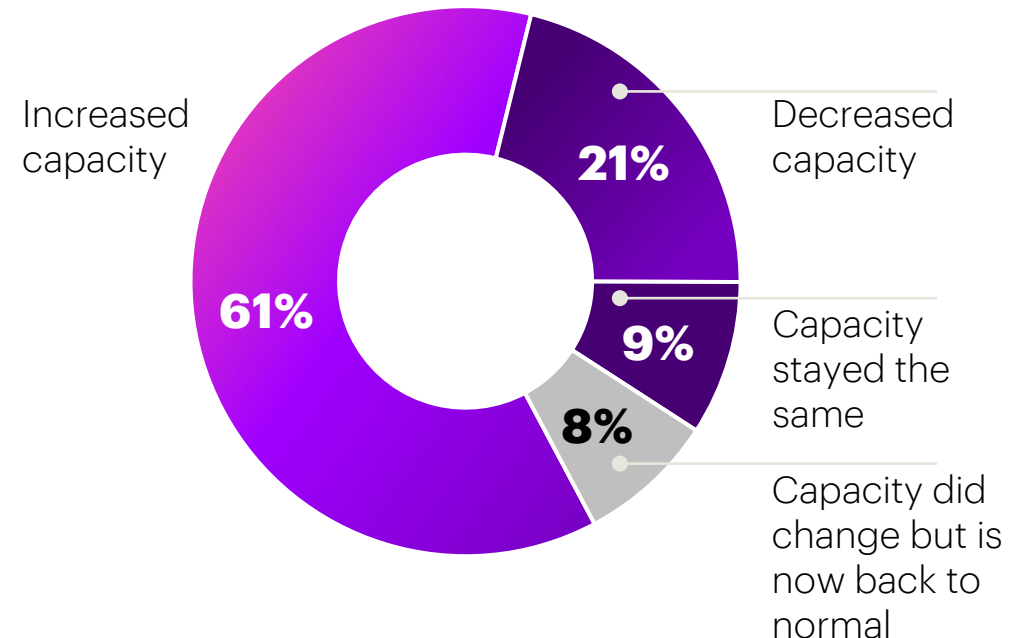
The daily volume of patients they see in their practices continues to decrease

3/4

of **HCPs** have seen a **decrease in patient numbers over the past year** and a **third significantly** so.



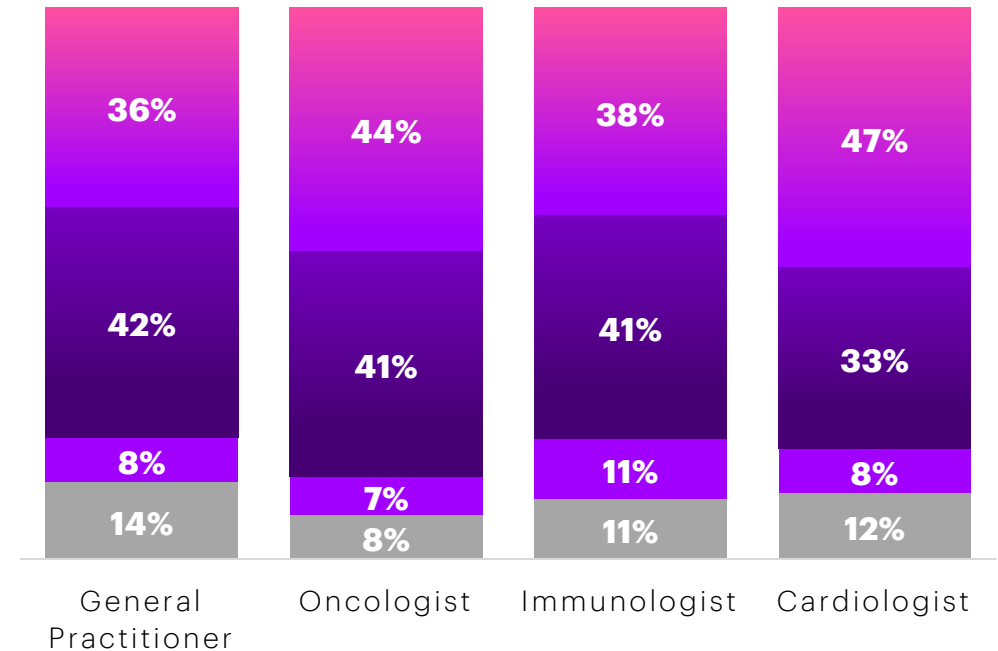
Most still have more capacity available than before COVID-19



HCPs are taking note of and recognizing those pharma companies who provide more meaningful engagements.

Almost **9 in 10**

of HCPs acknowledge that some companies offer better engagements, with 41% noting “significantly so”.



- Some companies were significantly better than others
- Some companies were moderately better than others
- Some companies were marginally better than others
- There was little differentiation between companies

HCPs are rewarding pharma companies that deliver positive interactions with more access

They would be more willing to meet others if they were as good as their best relationship

88%

of HCPs have would be **twice as likely to meet with other companies/ reps** if their best relationship were replicated.

Highly positive interactions make them more likely to engage with that company in some other way

35%

Will **meet with different people** from that company in the future

38%

Will be **more likely to meet** with that person /company again

39%

Will **make more time** for that person/ company next time we meet

41%

Will **open e-mails** and **listen to messages** from that company more than others

42%

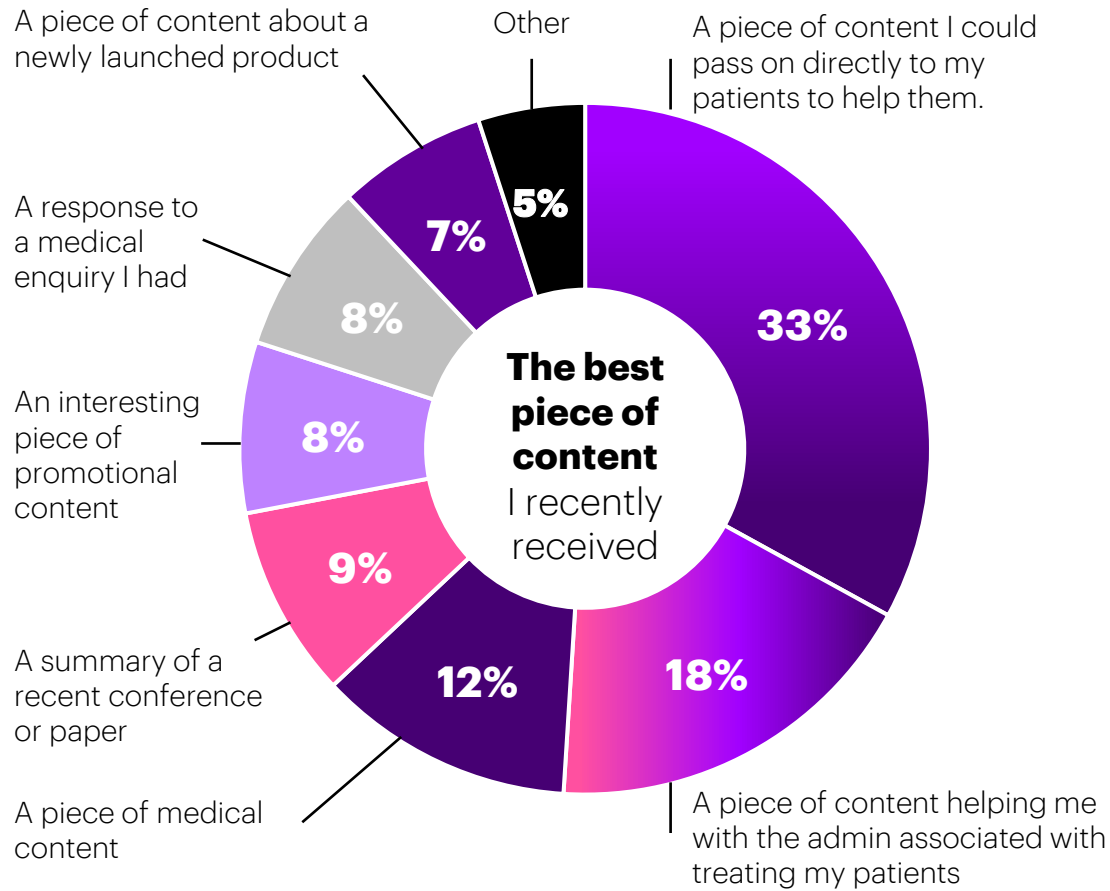
More likely to **engage** with that person/ company in **some other way**



#3 Key Finding

HCPs most value connections that blend the best of virtual and in-person, focused on the needs of their patients.

HCPs value content that helps them better serve their patients



Data plays a dominant role in shaping treatment decisions

59%

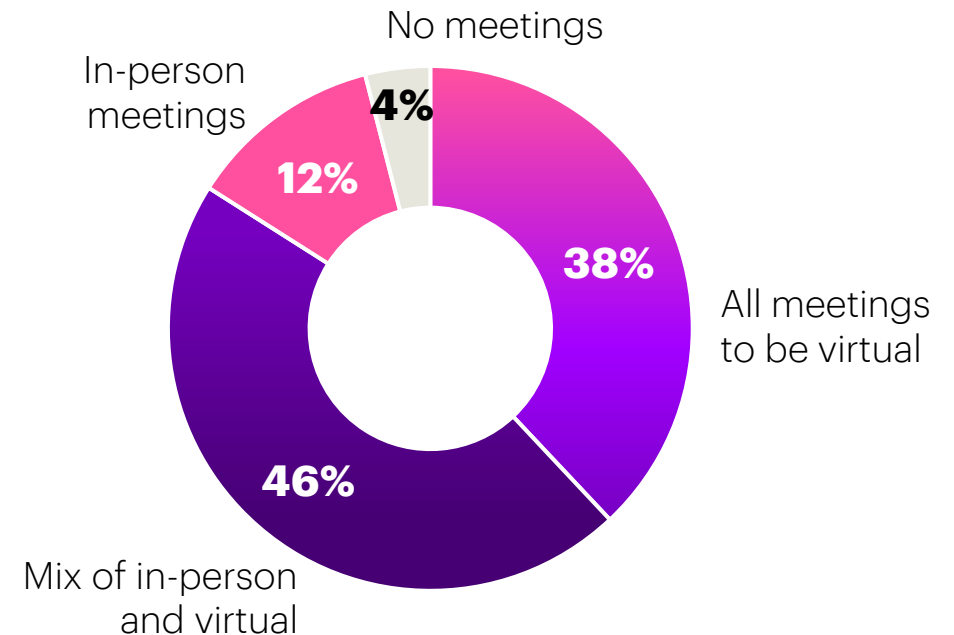
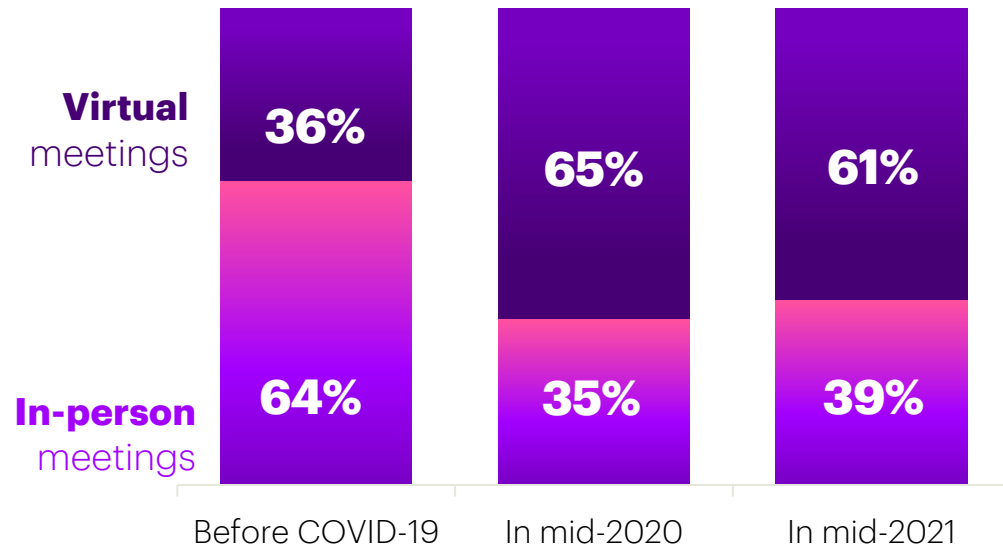
of HCPs regarded technology-driven recommendations based on data, such as **clinical trial and real-world data**, as the most popular factor shaping their treatment decisions.



All indications are that virtual meetings are here to stay

Despite the lifting of travel restrictions in many countries, there has been no significant return to face-to-face

HCPs would prefer virtual engagement to continue after the COVID-19 pandemic ends



Looking ahead

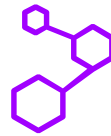
There is no single approach to success. Pharma companies will need to continuously challenge what defines relevance across the HCP landscape.

What HCPs find valuable when engaging with pharma companies differs across practices.



General Practitioner

Knowledge of when in my schedule it was most convenient to reach me.



Oncologist

Opportunities for me to collaborate and network with my peers.



Immunologist

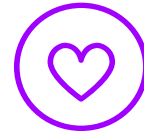
A rapid response to my queries and needs.



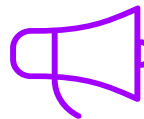
Cardiologist

Interacting with me in an empathetic, authentic and personal way.

Pharma companies must seize the opportunity to test **bold new ways of thinking and working**



Continuously challenge **what defines relevance.**



Stop regarding the field force as **a standalone channel.**



Minimize the content clutter.

Contacts



Laura Dix

Managing Director – Life Sciences

laura.e.dix@accenture.com



Suzy Jackson

Managing Director – Life Sciences

suzy.jackson@accenture.com



Ray Pressburger

Managing Director – Life Sciences
Lead, Commercial, Sales and Marketing

ramon.w.pressburger@accenture.com

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