

# Doctors & Digital: The Current State of Digital Health



*This whitepaper provides a statistical overview of digital technology in the healthcare space and insights on how brands can become more involved in digital initiatives.*

## Topics covered in this whitepaper:

- ✓ Which digital technologies doctors are using now
- ✓ Which new technologies are on the horizon
- ✓ Opportunities for healthcare marketers to improve their digital offerings

# The digital health landscape

Forget what you may have heard in the past about doctors not being comfortable with digital. In reality, quite the opposite is true. The statistics below show that doctors have embraced digital – for both personal and professional use.

The same thing, unfortunately, cannot be said for pharma brands. Recent statistics reveal that the digital gap between doctors and brands is widening daily. And yet, many pharma brands are hesitant to move away from their traditional marketing tactics.

According to *Quintiles' 2015 Digital & Multichannel Marketing* customer survey, pharma executives expressed a reluctance to “risk experimenting with newer digital channels unless traditional channels have failed”.<sup>1</sup> Illustrating this very same point, a recent report from Marketo® found that **35%** of all marketers use print, compared with **47%** of healthcare marketers.<sup>2</sup>

## Doctors are increasingly digital



4 out of 5

healthcare professionals have access to or use a tablet or smartphone for their work<sup>3</sup>



75%

of healthcare professionals use a tablet or smartphone regularly for professional purposes<sup>3</sup>



71%

of hospitals see mobile communications as an emerging priority<sup>4</sup>

## Brands are falling further behind

Only **15%** of current pharma activity is digital<sup>5</sup>

## What this means for pharma marketers

Brands need to question their own status quo. Just because a certain strategy worked in the past doesn't mean it can't be improved on. Push your brand to do more by taking a multi-channel approach and extending your traditional marketing tactics with digital initiatives. Once you make digital an essential piece of your brand development and strategic planning process, you'll find the commercial opportunities are seemingly endless.

# What do docs want from digital?

Doctors are increasingly connected and many are using all three electronic delivery channels in a professional capacity (desktop, tablet and smartphone). These devices are used to perform a variety of tasks – from collecting and monitoring patient data to staying in the loop on the latest product news.

What doctors *really* want, however, is to “learn more”. Staying up-to-date on the latest clinical studies and products, as well as networking with their peers, occupies a significant amount of their time online. And that’s just the tip of the iceberg. *The Oxford University Press*<sup>6</sup> lists a wide array of HCP self-reported educational activities including: watching webcasts and videos from medical conferences, reviewing patient education tools and downloads, and using online eCME and e-details, just to name a few.

## Docs want to learn digitally

**80%**



A recent study found over **80%** of HCPs believe pharma should be funding more educational resources.<sup>7</sup>



**2/3** of HCPs said they’d want to spend half of their “being detailed” time online, and the other half face-to-face.<sup>8</sup>



Nearly **50%** of all HCPs feel that being detailed online is more effective than face-to-face in regards to their willingness to prescribe.<sup>8</sup>



**39%** of HCPs believe pharma should be in both the funding and input of eCME resources.<sup>8</sup>

## What this means for pharma marketers

Give the docs what they want! Far too often, pharma brands prioritize their own wants over doctors and make it all about them. Doctors trust brand-supplied information and education when it adds real value to their work.

# What's next for digital health?

More than anything else, digital is connecting patients and doctors in unprecedented ways. According to Deloitte's *2016 Consulting Healthcare Sector Report*, digital connected health is going to be a key area of development in coming years.<sup>9</sup>

Technologies that allow for remote communication, diagnosis, treatment and monitoring will only become more mainstream as we outgrow more traditional healthcare business models.

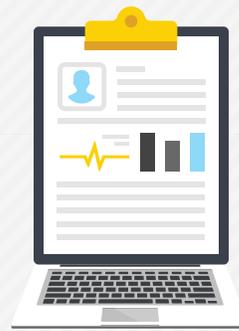
## Growing digital influences

The value of e-clinical mobile platforms is expected to more than double from \$3 billion in 2014 to over \$6 billion by 2020.<sup>10</sup>

## Digital connected health



**mHealth:** mobile health has the potential to transform healthcare monitoring and patient engagement. According to a recent study, two-thirds of Americans have already shown a preference for digital health management over physical.<sup>11</sup>



**Electronic patient records:** if healthcare systems continue to lag, individuals will want to create, buy and manage access to their own electronic medical records.



**Wearables:** recent studies found 79% of Americans are currently willing to use a wearable to manage their health.<sup>11</sup> Additionally, biosensors may soon be able to monitor chemicals and biomarkers, allowing doctors to determine how well a drug is metabolized, aiding in dosing and frequency adjustment.



**Virtual reality:** from general education and awareness-building to HCP training to patient rehabilitation – the possibilities are seemingly endless with VR.

## What this means for pharma marketers

It's time to start thinking about your brand long-term. Do you see it being able to adapt to these types of industry changes? If not, it's time to shift your brand's current mindset. If you want to stay relevant in the years to come, you'll need to focus less on the immediate bottom line and more on creating lasting tools that will deliver value and improve care for both doctors and patients.

# In summary

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- Docs aren't just embracing digital on their own time, the majority have made desktops, tablets and smartphones a part of their clinical experience.
  - An increasing number of technologies designed to increase the reach of doctor-patient engagement will change traditional healthcare business models.
  - Despite recent trends, a disproportionately low percentage of pharma marketing is done digitally. Pharma marketers need to look at new and more meaningful ways they can engage doctors digitally.
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We hope this has been a helpful read. As you can probably tell, we're passionate about great user experiences and helping our clients get the most out of their digital projects.

If you'd like to learn more about what we do, please don't hesitate to reach out. We always love meeting new people!

**Want to learn more? Contact Neil.**

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