

Non-Personal Promotion in the Wake of a Wildly Changing Digital Landscape



A Publisher's perspective on the here, now and beyond

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It is becoming clear that the impact of the COVID-19 pandemic and the ramifications of social distancing on our society has fueled an increase in the speed and breadth of adoption of digital channels, technologies, and services for society as a whole. Many believe that this unique time in our history will be viewed as the 'tipping point' toward the widespread adoption of digital e-commerce and some fundamental changes for how we transact our daily personal and business needs. The resulting impact of the COVID-19 crisis for physicians and HCPs is no less profound and possibly long lasting. Disruptions to standard workflows including logistical challenges in delivering patient care, staffing, billing and reimbursement, and accessing up-to-date clinical and pharma information and support are just a few of the many new challenges clinicians are confronted with.

The data is showing that now more than ever, they're turning to digital sources and technologies to meet their informational needs and to deliver care for their patients. **According to a recent survey by CMI/Compas, 86% of all HCP responders agreed that it is appropriate for the pharmaceutical industry to provide information related to their products to professionals during this pandemic.**¹

Pharmaceutical companies are also confronted with new and unique challenges given the inability to effectively deploy traditional, heavy relied upon channels of promotion and education. In the absence of rep visits, dinner programs, and society conferences, how can brand teams appropriately and respectfully support core promotional goals and metrics including reach/frequency, share of voice, and TRx/NRx? For many the answer will require a 'digital centric' focus and an effective pivot to non-personal promotion (NPP) at scale with corresponding expanded executional capabilities.

At some point in the future there will undoubtedly be a return to normal but perhaps a 'new normal' that looks somewhat different from what we know. Brand teams may find themselves in various states of readiness for the strong possibility of new realities and resulting changed behaviors. Success may depend on how they use their time now to increase their focus and capabilities to more effectively leverage non-personal promotion (NPP) as a larger component of the promotional mix.

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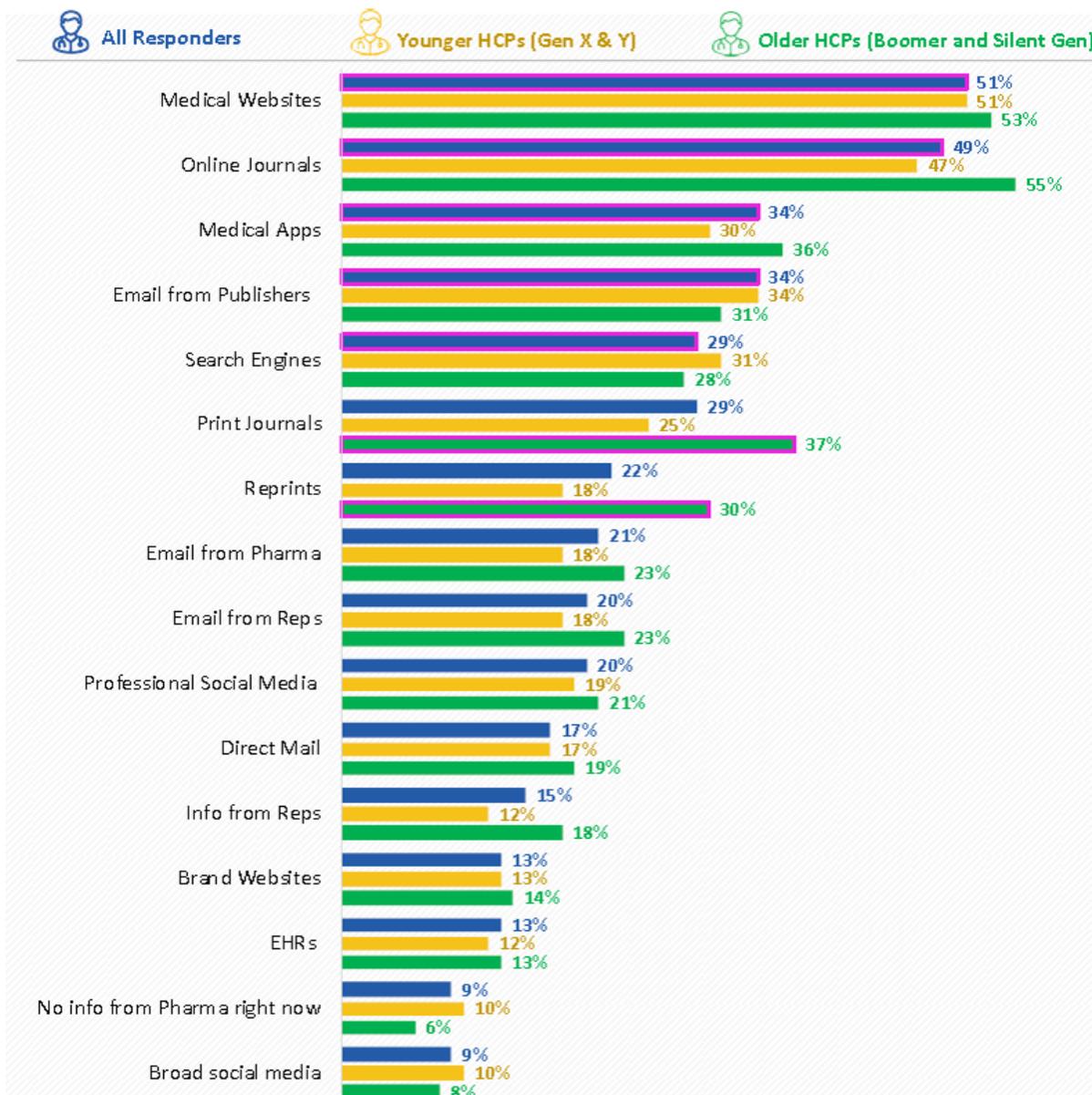
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A Tipping Point?

It may come as no surprise that COVID-19 has driven consumers and healthcare professionals alike to significantly increase their utilization of health and medical news sources to access up to the minute information. ***In fact, more than three-quarters of doctors said they have increased their use of digital resources during the COVID-19 pandemic and 47% of HCPs are turning to online research to replace information they had previously received from a field rep, according to a recent MM&M poll.***²

Across all specialties, HCPs have also increased their access and utilization of medical news and clinical information sites as they seek to stay informed. ***A March 2020 CMI/Compas study found that physicians rated medical news sites as their top choice and preferred source to receive pharma sponsored information including receiving such information from pharma reps.***¹

Which channels do HCPs prefer as a way to get information from Pharma?



Seeking to Stay Informed: Digital Activity is Expansive

Everyday Health Group and its portfolio of leading consumer and professional websites is uniquely positioned to realize these trends.

Q1 saw a significant increase in digital traffic across all properties, hitting record numbers in March that continues into April.

MedPage Today, the leading HCP focused specialty news site and flagship brand within the Everyday Health Professional network (EH Pro), saw explosive growth in March compared to 2019 along with double-digit percent increases in key metrics such as site time and unique HCP visits.

Health eCareers, a hub for healthcare employers and job seekers, saw a 44% increase in traffic over weekly averages and a 38% increase in job applies over weekly averages.

MEDPAGE TODAY®

143% Increase
in Traffic

MEDPAGETODAY'S
KevinMD.com
Social media's leading physician voice 

4,000,000 Social
Media
Shares



HEALTH
eCAREERS™

38%
Increase in
Job Applies

Shifting from Personal to Virtual

One highly visible result of COVID-19 has been the cancellation of annual spring and summer society conferences. Despite the live meetings being cancelled, MedPage Today, the leader in online conference coverage programming, is delivering virtual coverage where HCPs can conveniently access the key data, abstracts, presentations, and opinion that they would have only been able to obtain in person. The increased demand for virtual conference programs can be demonstrated in a few recent examples.

The American College of Cardiology (ACC) reported more than 38,000 unique visitors for its 3-day virtual conference in 2020.³

The growth of digital engagement has not been limited to virtual conferences. MedPage Today noted a double-digit increase in eNewsletter opens over the course of March promoting an array of COVID-19 articles as well as other condition-specific topics, programs, and resources.

As a matter of fact, during this traffic surge, other non-COVID-19 condition centers and articles as well as pharma sponsored programs also saw overall increases in readership and engagement. As these trends continue amidst the continued erosion of rep access to physicians and the current and unexpected elimination of personal-promotion altogether, many argue that executing 'digital first' non-personal promotion strategies has become mission critical.

In its recent virtual coverage of the 2020 **Conference on Retroviruses and Opportunistic Infections (CROI)**, MedPage Today saw an increase in every KPI versus 2019 performance.

MedPage Today Coverage of CROI

Engagements rose **55%**
 Unique Visits rose **79%**
 Time on Site rose **12%**
 Page Views rose **65%**



WHAT and HOW?

While many brand teams are facing reductions in total promotional budgets, portions of the previously allocated field budgets including physician office visits by reps, dinner meetings and symposia, and other live events are being shifted to non-personal promotion (NPP) efforts. **MM&M recently confirmed what EHPro has been observing from many clients, that while 46.2% of overall budgets are being reduced, non-personal promotion (NPP) spend has increased at an unprecedented rate of 43.5%.**²

As we explore the keys to effective execution of NPP, pharma brands should consider the following:

Current HCP Trends

Promotional Implications

Now more than ever, HCPs are accessing clinical news and information and they're determining where, when, and how they get it

Execute with a 'digital surround sound' approach across preferred HCP destinations with mobile-enabled, convenient 24/7 access to information, tools, and support

Develop multiple messages and advertising formats to more effectively engage an array of HCP needs

HCPs increasingly prefer medical sites and online journals as their primary source of clinical and pharma sponsored information (Source: CMI/Compas)

Engage HCPs within the third party destinations and content features that they prefer

Execute native advertising formats to drive deeper message engagement and impact

HCPs need access to helpful 'on demand' brand information and support for their patients

Brands should shift messaging and tonality to focus more on relevance and support

Limit push tactic such as promotional emails at this time

To effectively execute NPP at scale, brand teams must also ensure prioritization for a new set of skills and focus including:

- Expanded creative capabilities to produce the variety of messaging assets and formats necessary to compete for the attention of busy HCPs
- Increased MLR resources and bandwidth that corresponds with the increase in digital messaging assets
- Vendor selection that looks at core capabilities such as in-house design, MLR submissions expertise, physician level data (PLD), and reporting & analytics

What's Next?

The adoption of digital among HCPs that was already occurring prior to the COVID-19 pandemic, combined with the increased reliance on these digital sources at the present, forces us to contemplate what the 'new normal' may look like when personal promotion once again becomes an option. Key questions remain:

- Can traditional personal promotion tactics like in office visits by reps and attendance of medical conferences by HCPs see the scale once seen?
- Will the new digital behaviors of HCPs formed during this time be long lasting or permanent?
- What does the right promotional channel and tactic mix look like in this new reality?

Regardless of the actual result, brand teams can use this time wisely to prepare for the new skills and executional capabilities that will undoubtedly reflect a heavier reliance on NPP in the near and mid term. For all stakeholders in the healthcare ecosystem we can agree that 'necessity is truly becoming the mother of invention'.

Referencing & Sourcing Information

1. Dorfman S, Freid J, Henault F, et al. What HCPs Want and Need from Life Sciences Companies During the COVID-19 Pandemic. Survey conducted by: CMI Media and Compas Inc. (CMI/Compas). Update as of April 10, 2020.
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