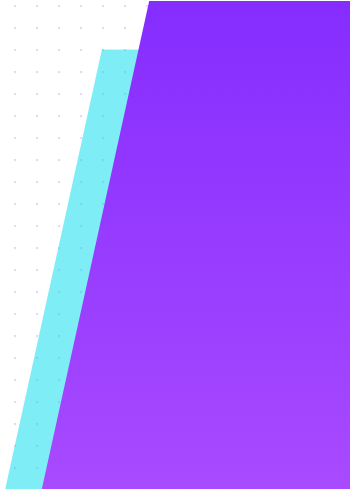


HCP Sentiment Series Part 8

# What physicians really want from medical device companies

Published February 2022



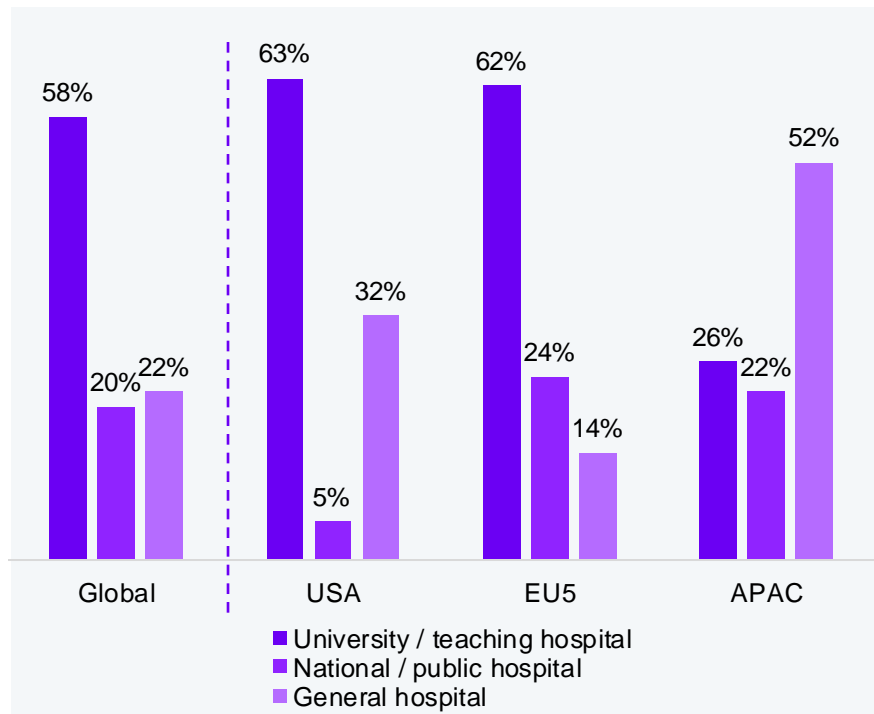
## Sermo's HCP Sentiment Study: Part 8 research overview

- Questions were solicited from Sermo clients and fielded November 2021
- Sermo invited physicians to participate among a list of eleven specialties across eight countries
- Screener requirements:
  - Hospital-based physicians
  - Between 3 and 30 years in practice
- **Total sample: 218**

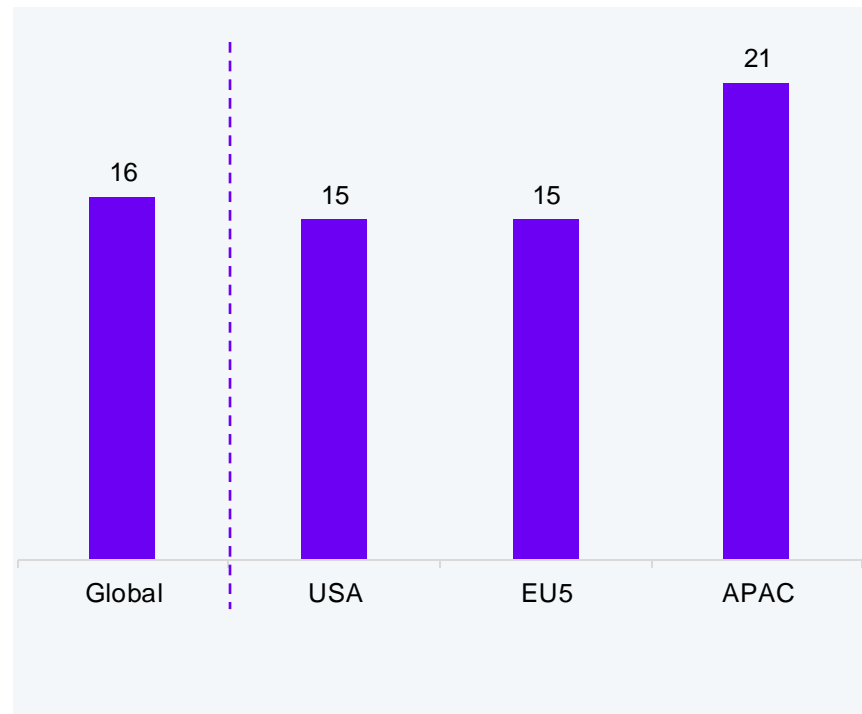
| Country                             | Sample |
|-------------------------------------|--------|
| USA                                 | 38     |
| Italy                               | 35     |
| Germany                             | 31     |
| UK                                  | 30     |
| Spain                               | 30     |
| France                              | 27     |
| Japan                               | 23     |
| China                               | 4      |
| Specialty                           | Sample |
| Orthopedic surgeons                 | 42     |
| General surgeons                    | 36     |
| Radiologists                        | 35     |
| Urologic surgeons                   | 32     |
| Neurosurgeons                       | 22     |
| Vascular surgeons                   | 13     |
| Cardiac surgeons                    | 11     |
| Obstetric surgeons                  | 10     |
| Colorectal surgeons                 | 6      |
| Plastic and reconstructive surgeons | 6      |
| Electrophysiologists                | 5      |

# Sermo's HCP Sentiment Study: Respondent profile

PRIMARY PRACTICE SETTING



AVERAGE YEARS OF EXPERIENCE

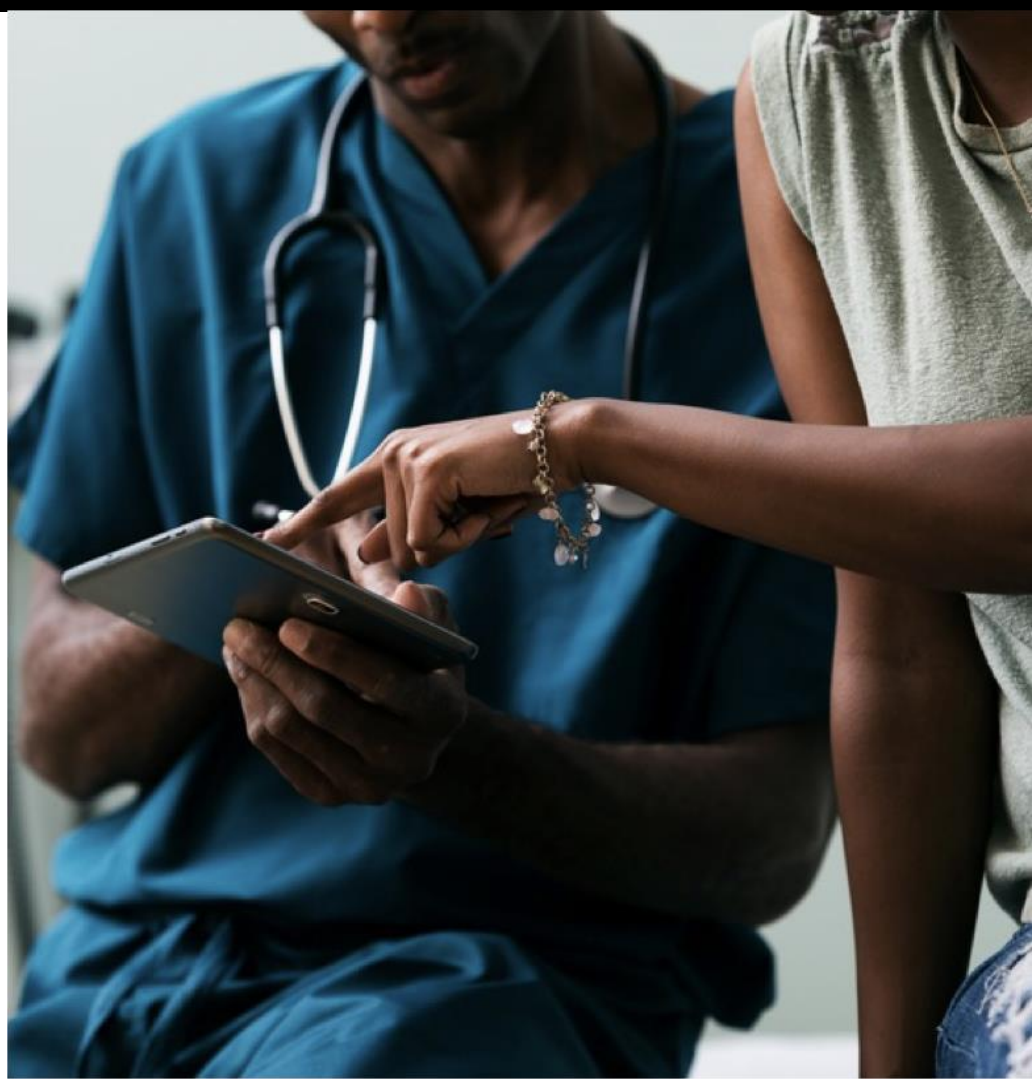


**sermo** PROPRIETARY AND CONFIDENTIAL

S2. What is your primary practice setting?  
 S3. How many years have you been in practice in your specialty?

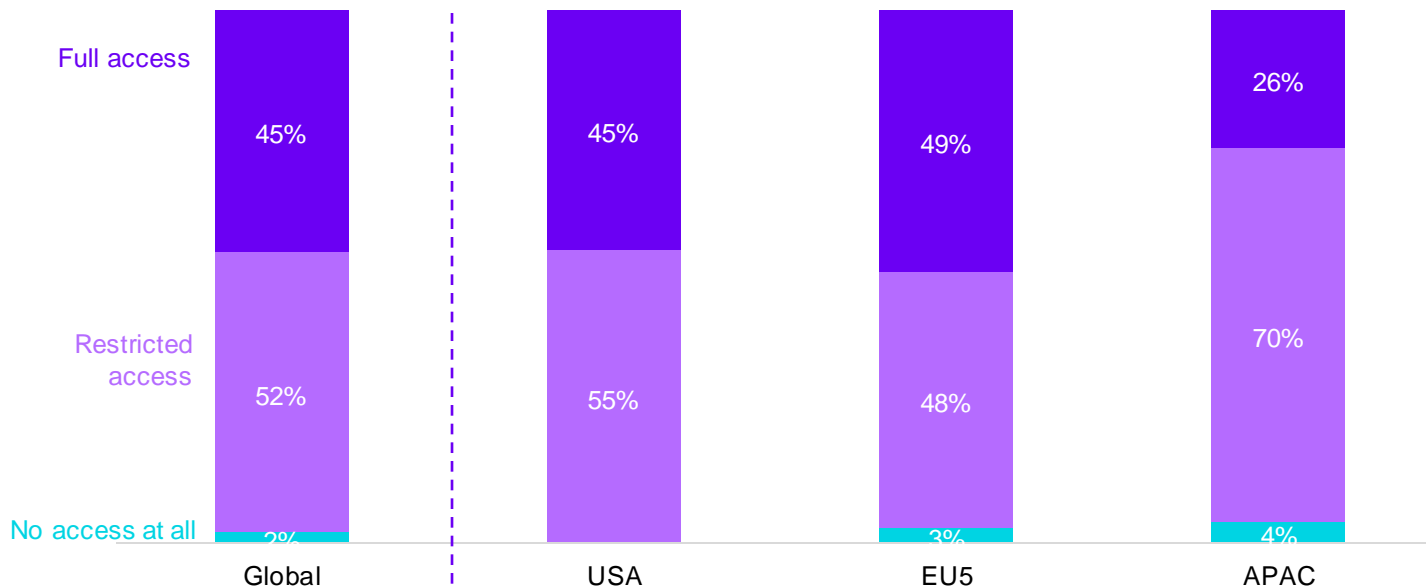
|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
| Base Sizes, n= | 218    | 38  | 153 | 27   |

# Medical Device Access Restrictions



# While medical device sales reps have full access in around half of hospitals in the US and EU5, the access in most APAC hospitals is still restricted

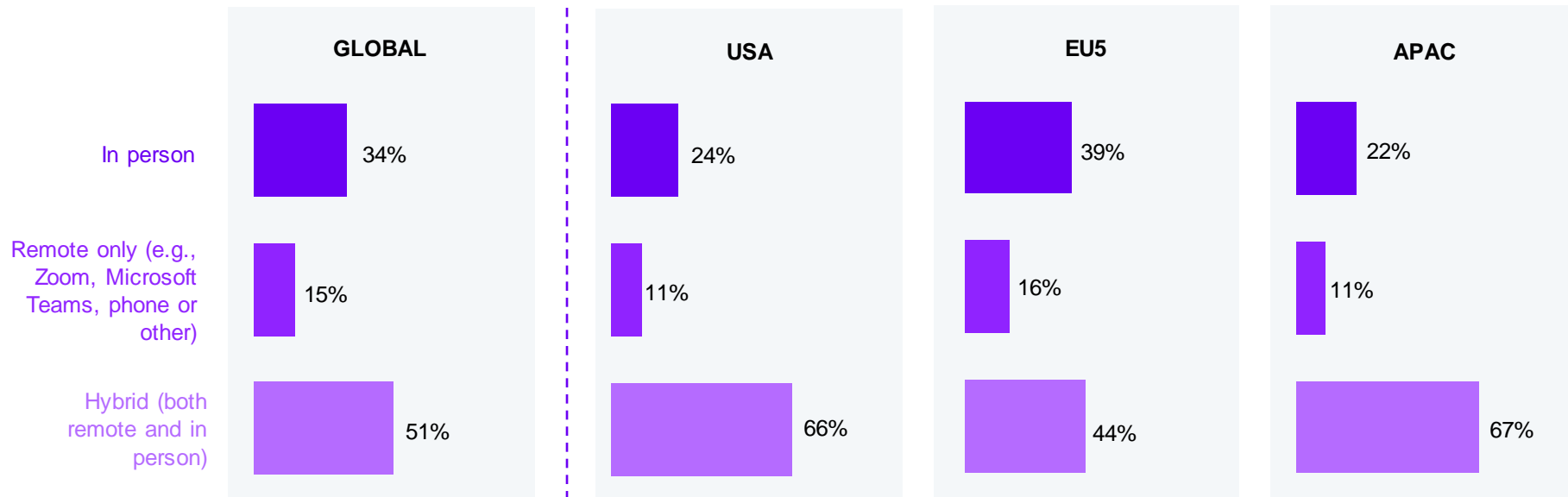
HOSPITAL'S POLICY ON MEDICAL DEVICE SALES REP ACCESS



|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
| Base Sizes, n= | 218    | 38  | 153 | 27   |

# Hybrid is the most popular approach to engage with medical device sales reps in the US and APAC, while EU5 is increasingly utilizing in person meetings

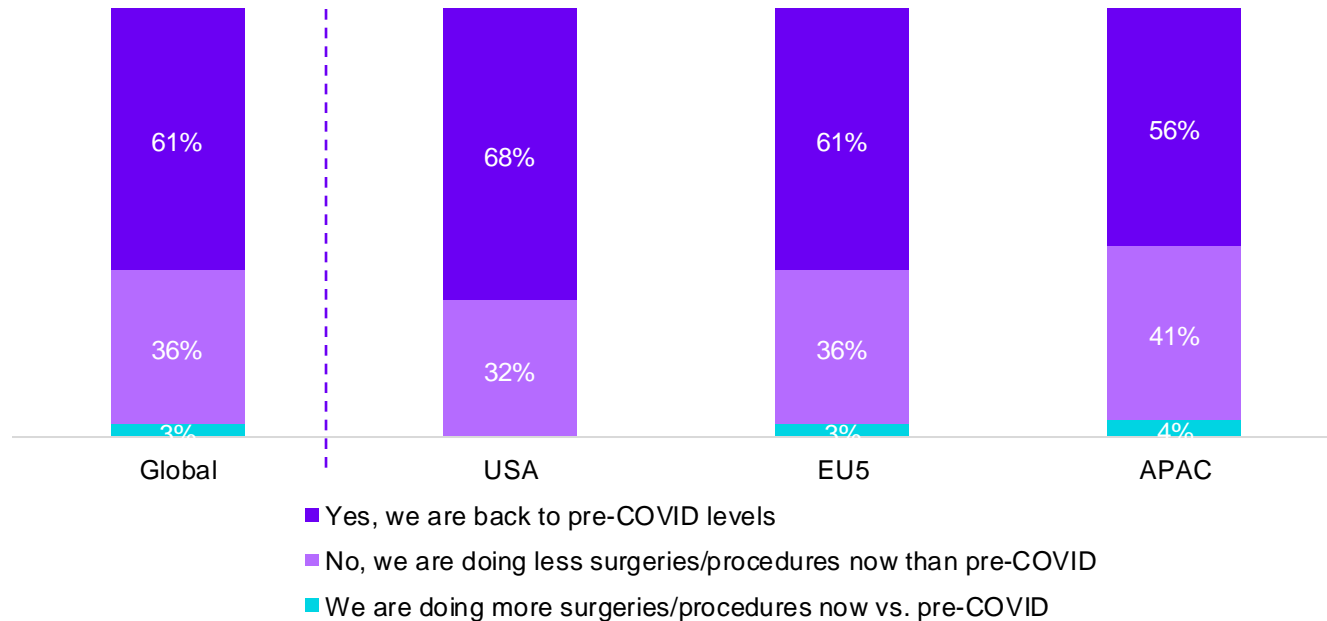
## ENGAGING WITH MEDICAL SALES REPS TODAY



|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
| Base Sizes, n= | 218    | 38  | 153 | 27   |

# 6 in 10 physicians across all regions say that elective surgery / procedure volume has returned to pre-COVID levels in their hospitals

RETURN OF ELECTIVE SURGERY / PROEDURE VOLUME TO PRE-COVID LEVELS



|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
| Base Sizes, n= | 218    | 38  | 153 | 27   |

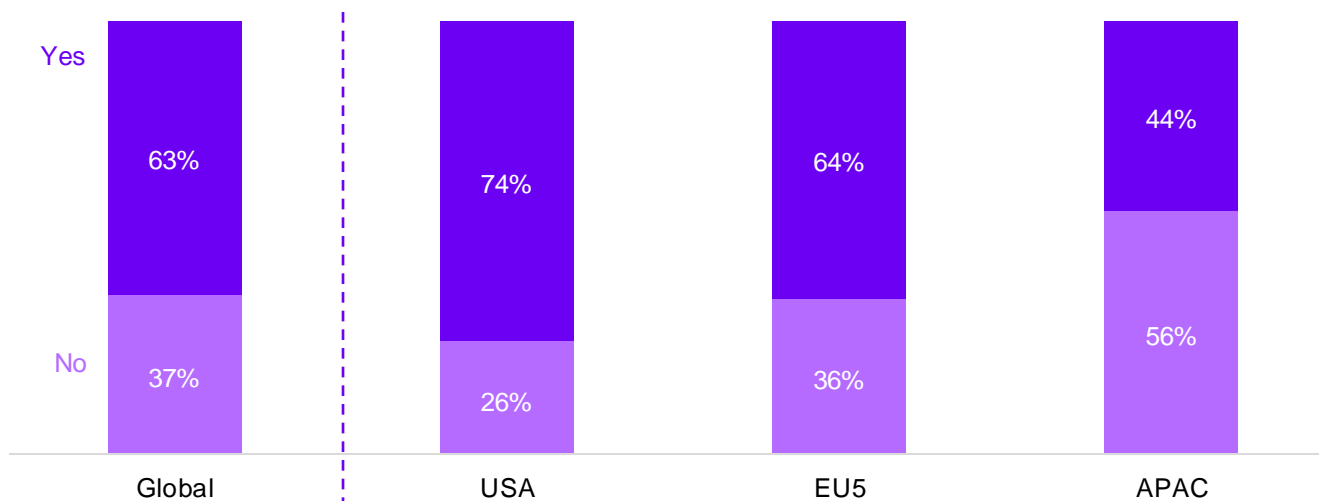
# How to support HCPs and the Medical Community





# Digital or virtual device trainings were popular in the past 12 months among physicians in the US and EU5, less so in Japan and China despite of the stricter sales rep access in region's hospitals

PARTICIPATION IN DIGITAL OR VIRTUAL MEDICAL DEVICE TRAININGS IN THE PAST 12 MONTHS



|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
| Base Sizes, n= | 218    | 38  | 153 | 27   |

# Medical congresses / meetings is the most trusted source when learning about medical device technologies and procedures; peers is a highly valued source in the US

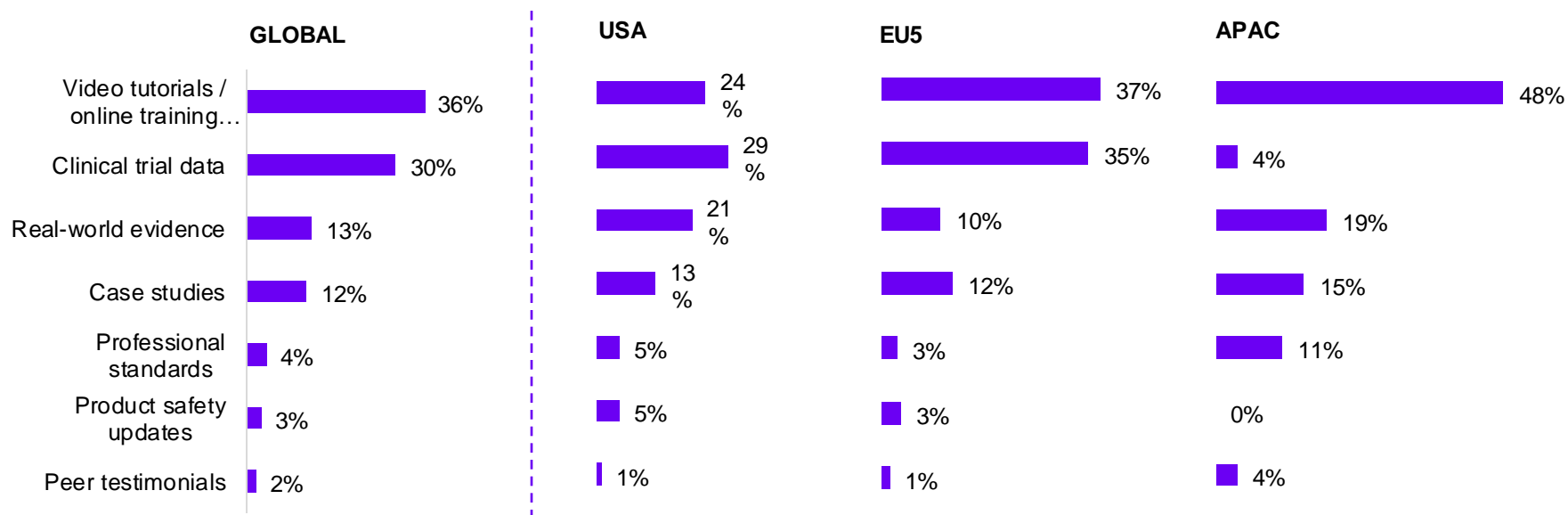
MOST TRUSTED SOURCES WHEN LEARNING ABOUT MEDICAL DEVICE TECHNOLOGIES AND PROCEDURES

|                                               | GLOBAL | USA | EU5 | APAC |
|-----------------------------------------------|--------|-----|-----|------|
| Medical congresses/meetings                   | 1      | 3   | 1   | 1    |
| Physician peers                               | 2      | 1   | 2   | 5    |
| Sales representatives                         | 3      | 4   | 3   | 2    |
| Medical journals/associations                 | 4      | 2   | 5   | 6    |
| Online webinar/training course                | 5      | 6   | 4   | 3    |
| Company/brand website/email                   | 6      | 5   | 6   | 4    |
| Updates from your own hospital administrators | 7      | 8   | 7   | 8    |
| Social media/digital advertisements           | 8      | 9   | 8   | 7    |
| Medical news outlets                          | 9      | 7   | 9   | 9    |

|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
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# Video tutorials / online courses, followed by clinical trial data (not the case in APAC), are considered the most valuable source to learn about medical device technologies

MOST VALUABLE TYPE OF INFORMATION WHEN LEARNING ABOUT MEDICAL DEVICE TECHNOLOGIES AND PROCEDURES

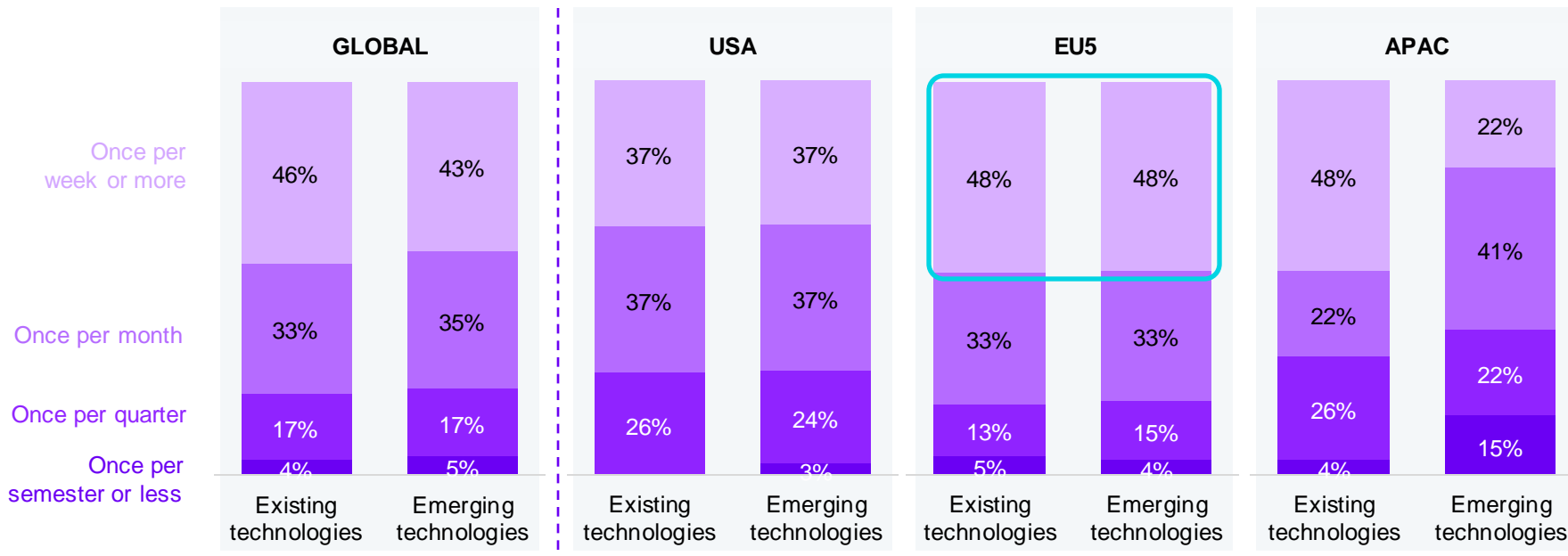


Q7. What type of information do you find most valuable when learning about medical device technologies and procedures?

|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
| Base Sizes, n= | 218    | 38  | 153 | 27   |

# 1 in 2 physicians in EU5 seek information about medical device technologies at least once per week; their peers in the US and APAC are less active information seekers

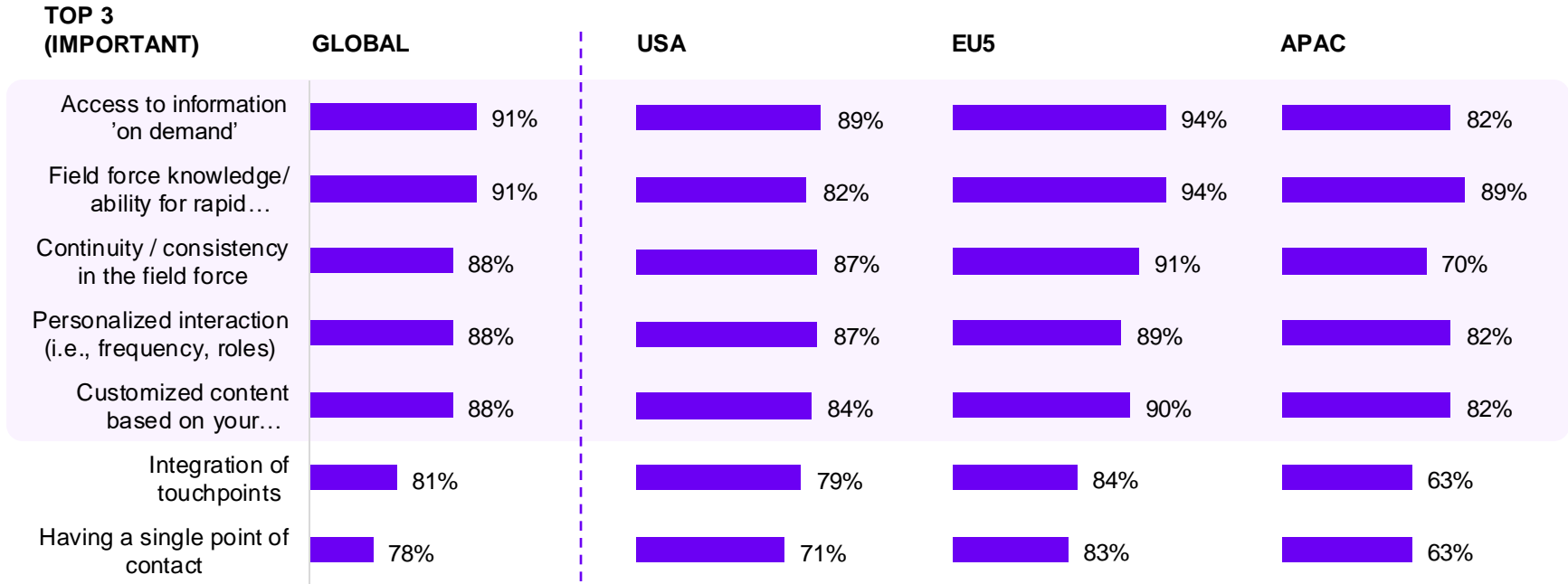
FREQUENCY OF INFORMATION SEEKING



|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
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# Quick access to information and strong field force are extremely important to physicians across all regions when interacting with medical device companies

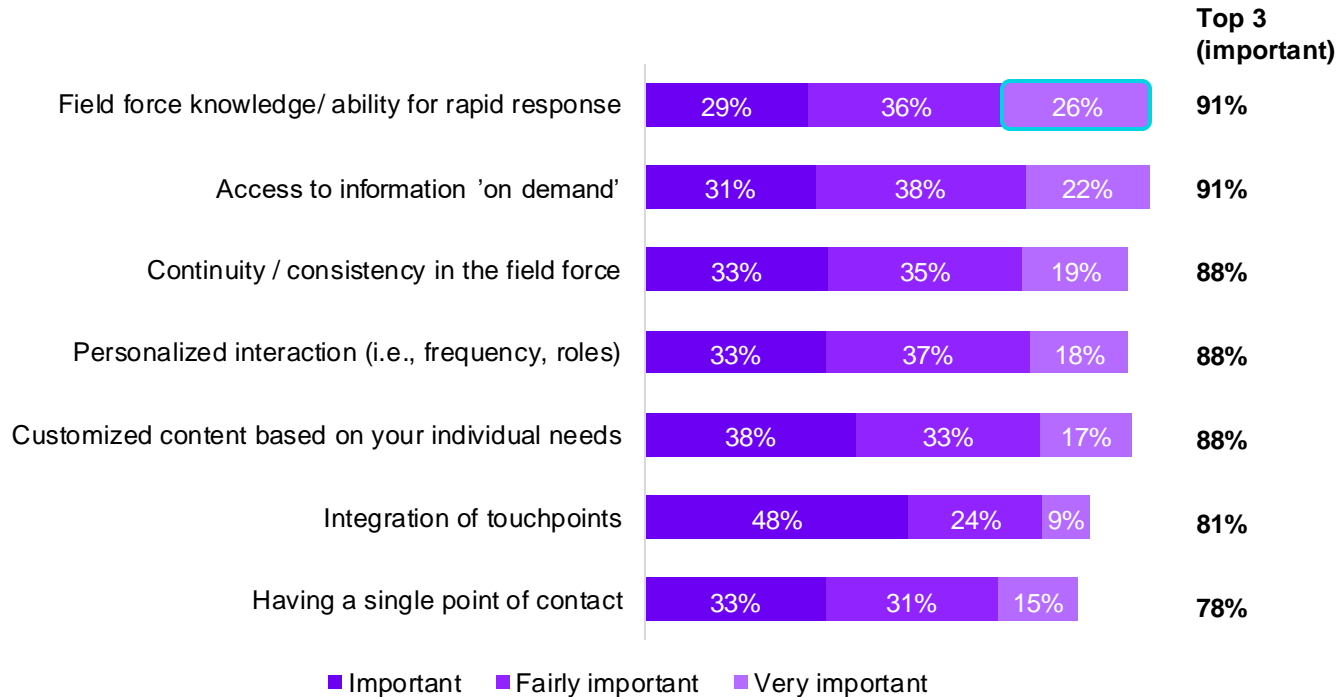
IMPORTANCE OF VARIOUS ASPECTS OF INTERACTION WITH MEDICAL DEVICE COMPANIES



|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
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## Global: Importance of various aspects of interaction with medical device companies

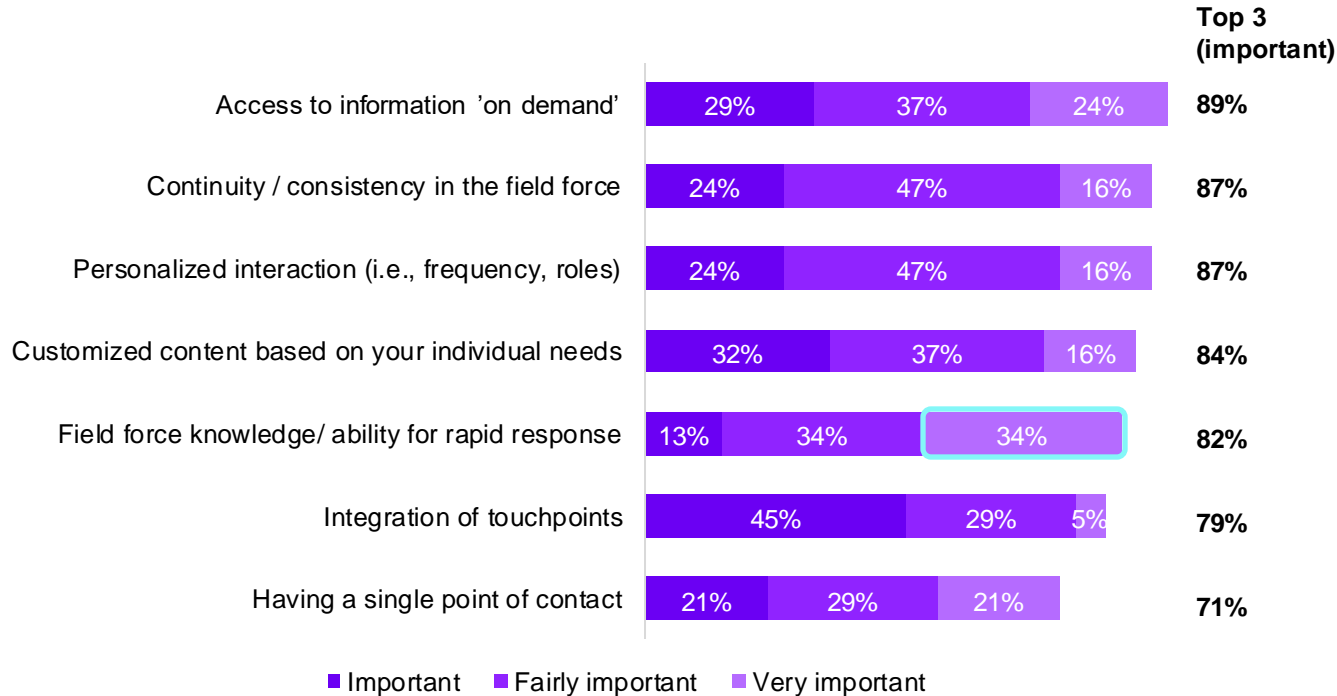


Globally, 1 in 4 physicians say that field force knowledge is very important when interacting with medical device companies; other aspects rated *slightly lower*

|                |        |
|----------------|--------|
|                | Global |
| Base Sizes, n= | 218    |



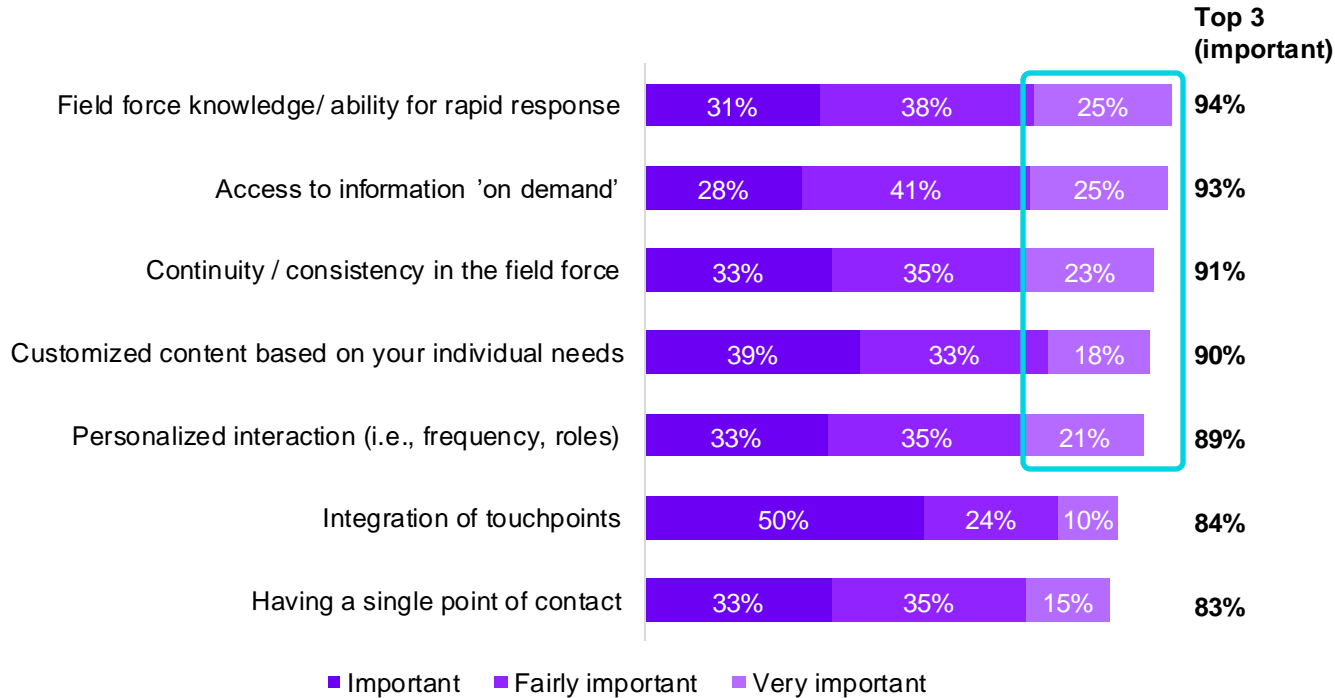
## USA: Importance of various aspects of interaction with medical device companies



1 in 3 US physicians say that field force knowledge / ability for rapid response is very important when interacting with medical device companies; other aspects rated lower



## EU5: Importance of various aspects of interaction with medical device companies

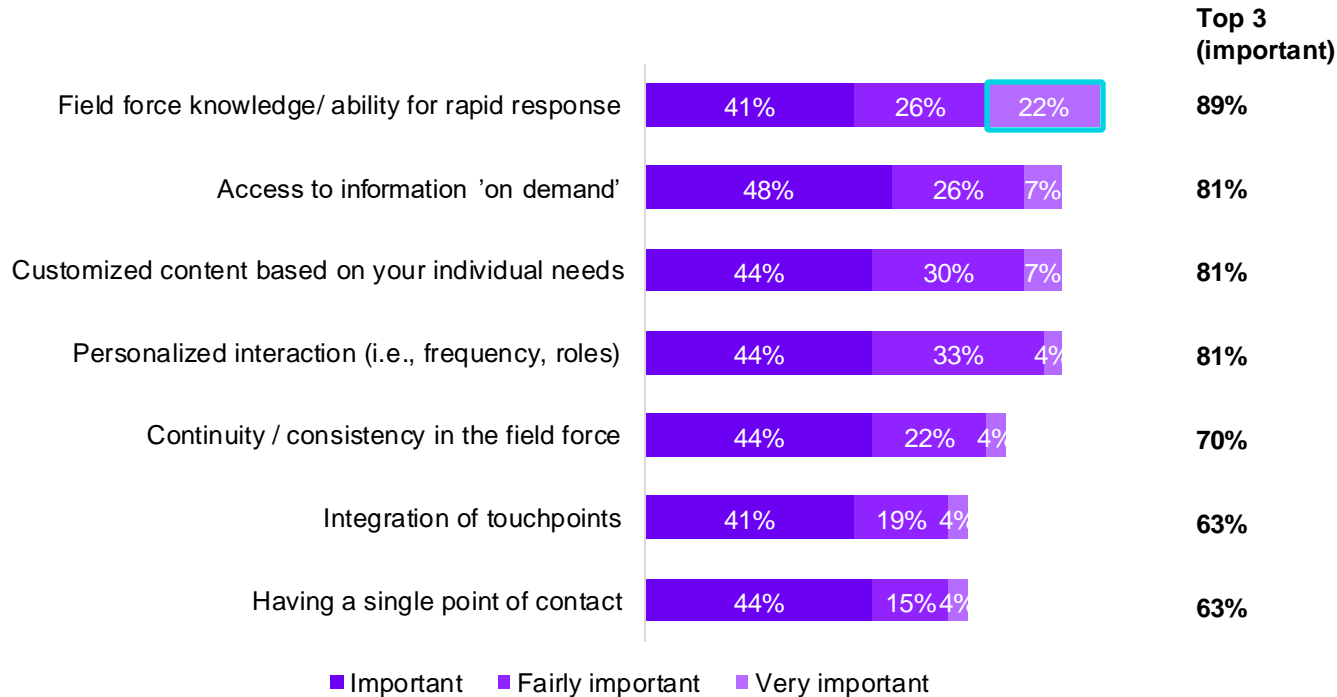


In EU5, aspects considered as the most important vary





## APAC: Importance of various aspects of interaction with medical device companies



In APAC, 1 in 5 physicians say that field force knowledge is very important when interacting with medical device companies; other aspects rated lower

# Physicians across all regions start utilizing a new medical device by broad research and end with logistical details, but get there in slightly differing ways

## DESIRED ADOPTION STEP ORDER FOR LEARNING ABOUT NEW MEDICAL DEVICE OR PROCEDURE

|                                               | GLOBAL | USA     | EU5 | APAC    |
|-----------------------------------------------|--------|---------|-----|---------|
| Meet with Sales Rep                           | 1      | 3       | 1   | 2       |
| Watch tutorial video / online training course | 2      | 1       | 2   | 4       |
| Discuss with peers                            | 3      | 2       | 3   | 6       |
| Review clinical data with Rep                 | 4      | 4 (tie) | 4   | 1       |
| Read about it on company/brand website        | 5      | 4 (tie) | 5   | 3       |
| Trial                                         | 6      | 6       | 6   | 5 (tie) |
| Read email from Sales Rep                     | 7      | 5       | 7   | 5 (tie) |
| Review pricing information                    | 8      | 8       | 8   | 7       |
| See educational digital advertisement         | 9      | 7       | 9   | 8       |

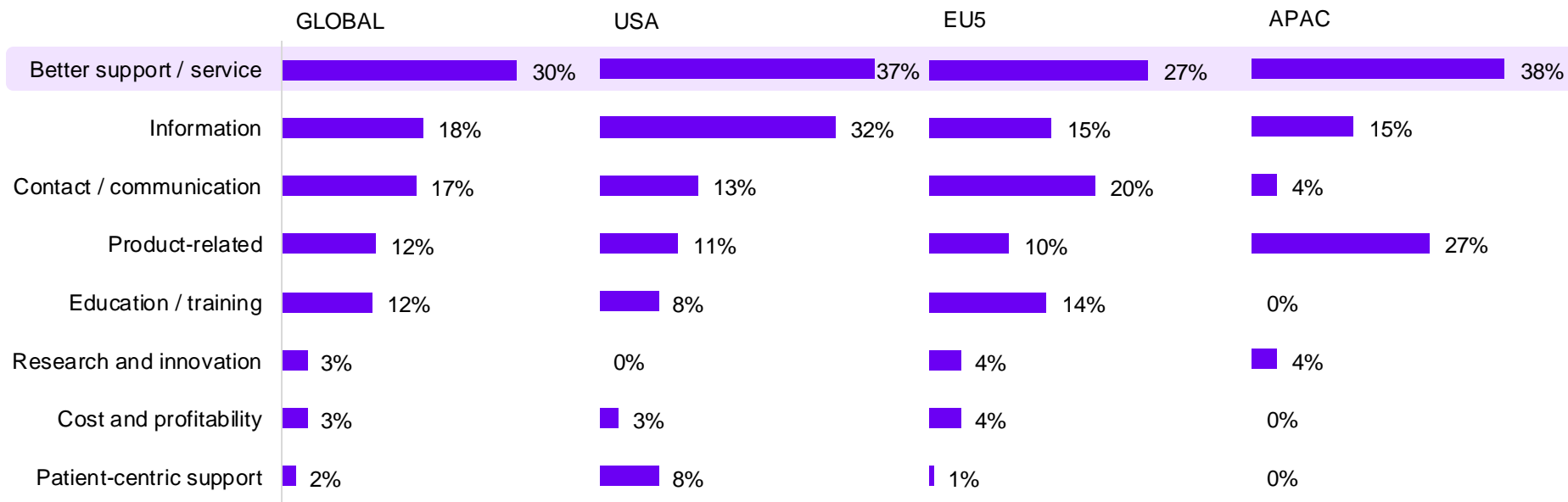
|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
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# What's next?



# When asked unprompted, one third of physicians across all regions primarily expect medical device industry to provide better support / service for HCPs

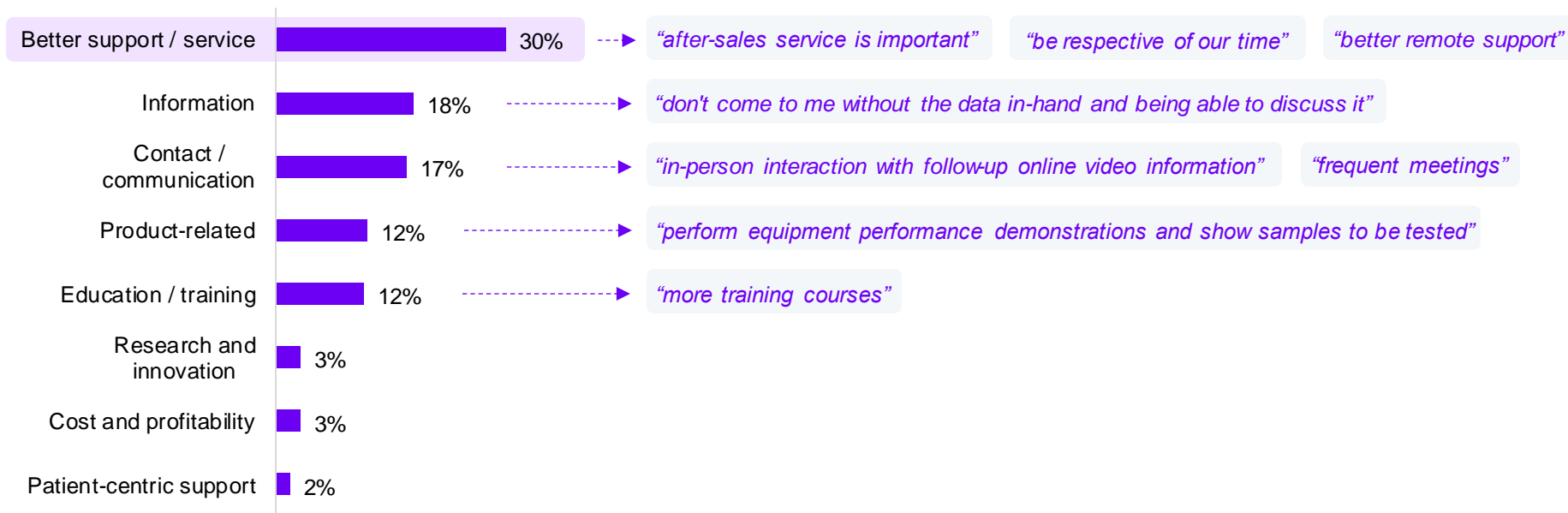
## HCP'S EXPECTATIONS FROM MEDICAL DEVICE INDUSTRY – ONE THING



|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
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## HCP's EXPECTATIONS FROM MEDICAL DEVICE INDUSTRY – ONE THING



|                | Global | USA | EU5 | APAC |
|----------------|--------|-----|-----|------|
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# What does this mean for the healthcare industry?

## Key findings

- Though surgery / procedure volume has returned to pre-Covid levels in around 6 in 10 hospitals across all regions, medical device sales reps are still having restricted access in around half of the hospitals in US and EU5 and in 74% of hospitals in Japan and China
- Participation in digital or virtual medical device trainings is active in USA and EU5 among physicians; less so in Japan and China despite stricter sales rep access in region's hospitals
- Medical congresses / meetings is the most trusted source when learning about medical device technologies and procedures; peers is a highly valued source in the US

## Implications for industry

- Hybrid remains the most popular approach to engage with medical device sales reps in the US and APAC, while EU5 is increasingly returning to in-person meetings—pharma should continue to reach and interact with physicians incorporating some in-person interactions
- Video tutorials / online training courses should be the main-focus when engaging with physicians on med-tech in Japan and China, whereas both online trainings and clinical trial data are equally valuable in US and EU5
- When interacting with physicians, medical device companies should primarily focus on physicians being able to quickly access the information and provide them with strong field force support

# Thank you

To learn how Sermo can support your HCP insights and engagement goals, email us at [business@sermo.com](mailto:business@sermo.com)

