Sermo’s HCP Sentiment Study:
Part 9 research overview

- Questions were solicited from Sermo clients and fielded May 2022

- Sermo invited physicians to participate among a list of 7 specialties across 8 countries

- Total sample: 824

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>155</td>
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<tr>
<td>Italy</td>
<td>119</td>
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<tr>
<td>Spain</td>
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<tr>
<td>UK</td>
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<tr>
<td>Germany</td>
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<td>France</td>
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<tr>
<td>Japan</td>
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<tr>
<td>China</td>
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<table>
<thead>
<tr>
<th>Specialty</th>
<th>Sample</th>
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<tr>
<td>HemOnc</td>
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<tr>
<td>Neurology</td>
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<tr>
<td>Cardiology</td>
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<td>Gastroenterology</td>
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<td>Endocrinology</td>
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<tr>
<td>Dermatology</td>
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<tr>
<td>Primary Care Physician</td>
<td>86</td>
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</table>
Sermo’s HCP Sentiment Study: Respondent profile

**Primary Affiliation**

<table>
<thead>
<tr>
<th>Region</th>
<th>Global (n=824)</th>
<th>USA (n=155)</th>
<th>EU5 (n=533)</th>
<th>Japan (n=77)</th>
<th>China (n=59)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hospital</td>
<td>6%</td>
<td>12%</td>
<td>4%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Academic Medical Center</td>
<td>8%</td>
<td>19%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Single specialty</td>
<td>10%</td>
<td>28%</td>
<td>32%</td>
<td>29%</td>
<td>90%</td>
</tr>
<tr>
<td>Multi-specialty</td>
<td>29%</td>
<td>30%</td>
<td>51%</td>
<td>48%</td>
<td>12%</td>
</tr>
<tr>
<td>All other</td>
<td>46%</td>
<td>12%</td>
<td>15.5%</td>
<td>5.5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Average Years Of Experience**

- Global (n=824): 16.1 years
- USA (n=155): 13.8 years
- EU5 (n=533): 15.5 years
- Japan (n=77): 22.9 years
- China (n=59): 18.8 years

**Questions**

S2. What is your primary practice setting?
S4. With what type of institution do you have your primary affiliation or employment?
Sero’s HCP Sentiment Study: Respondent profile

Average days/week spent speaking / meeting with patients

- 9% (17%) spent 3 days
- 8% (8%) spent 4 days
- 7% (15%) spent 5 days
- 8% (38%) spent 6 days
- 27% (20%) spent 7 days

For EU5:
- n=(824)
- Significantly higher than Global at 95% confidence level

For US:
- n=(155)
- Significantly lower than Global at 95% confidence level

For Japan:
- n=(533)
- Significantly lower than Global at 95% confidence level

For China:
- n=(77)
- Significantly lower than Global at 95% confidence level

For India:
- n=(59)
- Significantly lower than Global at 95% confidence level

S3. How many years have you been in practice in your specialty?
Pharma and physician engagement
Globally, HCPs are reporting burnout and fatigue impacting their ability to keep up with patient volume.

HCP burnout and fatigue affecting ability to return to normal patient volumes

- **Global** (n=824)
  - Yes, significantly: 36%
  - Yes, to some extent: 48%
  - No: 49%

- **USA** (n=155)
  - Yes, significantly: 35%
  - Yes, to some extent: 42%
  - No: 22%

- **EU5** (n=533)
  - Yes, significantly: 42%
  - Yes, to some extent: 45%
  - No: 14%

- **Japan** (n=77)
  - Yes, significantly: 16%
  - Yes, to some extent: 62%
  - No: 22%

- **China** (n=59)
  - Yes, significantly: 20%
  - Yes, to some extent: 75%
  - No: 5%

Q3. Have you seen the impacts of HCP burnout and fatigue negatively affect your or your colleagues’ ability to return to normal volumes of patient care/patient traffic?
Globally, physicians slightly prefer to see more Medical Science Liaisons (MSLs); however, in Japan, sales reps are significantly more popular.

Q1. Who would you like to see more of in the future: pharma sales reps or Medical Science Liaisons (MSLs)?

- Globally, 48% would like to see more MSLs, while 52% prefer sales reps.
- In the EU5, 47% prefer MSLs, 53% sales reps.
- In Japan, 68% prefer MSLs, 32% sales reps.
- In China, 37% prefer MSLs, 63% sales reps.

Significantly higher than Global at 95% confidence level (Japan, EU5).
Significantly lower than Global at 95% confidence level (Japan, EU5).
HCPs turn to online publications for medical/professional information

Online source for Medical & Professional Information
Global (n=824)

- Online scientific publications: 77%
- Continual medical education: 53%
- Virtual conferences/events: 53%
- Digital peer-reviewed journals: 51%
- Peer to peer medical platforms: 41%
- Manufacturer websites: 31%
- Other: 1%

Frequency of using online source

- Weekly: 49%
- Daily: 41%
- Monthly: 8%
- A few times a year: 1%
- Never: 0%

Q4. Where do you typically go online to look for medical & professional information?
Q5. How frequently do you look for medical & professional information online?

^Data Labels <3% not shown
Q2. In your experience, what are the most effective strategies manufacturers can use to keep you engaged during virtual programs like webinars?

Effective strategies for engagement during virtual programs

- Having multiple speakers / panel discussion
- Breaking up content into a series of shorter sessions
- Engaging visuals
- Videos
- Q&A breaks
- Polls or quizzes

Virtual engagement strategies are still relevant when selling to HCPs; Multiple speakers and shorter content sessions lead the way in maintaining physicians’ attention.

Significantly higher than Global at 95% confidence level
Significantly lower than Global at 95% confidence level
### Across geography, online scientific publications are relied on by HCPs for access to new information

<table>
<thead>
<tr>
<th>Online source for Medical &amp; Professional Information</th>
<th>EU5</th>
<th>Global (n=824)</th>
<th>Global (n=155)</th>
<th>Global (n=533)</th>
<th>Global (n=77)</th>
<th>Global (n=59)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online scientific publications</td>
<td>77%</td>
<td>68% ↓</td>
<td>78% ↓</td>
<td>77% ↓</td>
<td>77% ↓</td>
<td>90% ↑</td>
</tr>
<tr>
<td>Continual medical education</td>
<td>53%</td>
<td>51% ↓</td>
<td>57% ↑</td>
<td>30% ↓</td>
<td>32% ↓</td>
<td>88% ↑</td>
</tr>
<tr>
<td>Virtual conferences/events</td>
<td>53%</td>
<td>45% ↓</td>
<td>57% ↑</td>
<td>32% ↓</td>
<td>66% ↑</td>
<td></td>
</tr>
<tr>
<td>Digital peer-reviewed journals</td>
<td>51%</td>
<td>49% ↓</td>
<td>47% ↓</td>
<td>47% ↓</td>
<td>66% ↑</td>
<td></td>
</tr>
<tr>
<td>Peer to peer medical platforms</td>
<td>41%</td>
<td>41%</td>
<td>38% ↓</td>
<td>47% ↓</td>
<td>59% ↑</td>
<td></td>
</tr>
<tr>
<td>Manufacturer websites</td>
<td>31%</td>
<td>26% ↓</td>
<td>28% ↓</td>
<td>53% ↑</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

**Base:**
- Online source for Medical & Professional Information

Q4. Where do you typically go online to look for medical & professional information?

- `↓` Significantly lower than Global at 95% confidence level
- `↑` Significantly higher than Global at 95% confidence level
The impact of inflation on returning to normal levels of care
According to doctors, patients are stopping or postponing procedures due to inflation; especially in US and Asia

Q6. Are you seeing patients stopping or postponing treatment or procedures due to rising healthcare prices?

Patients stopping/postponing procedures due to increase in healthcare prices

- Yes, significantly
- Yes, to some extent
- No

<table>
<thead>
<tr>
<th>Country</th>
<th>Yes, significantly</th>
<th>Yes, to some extent</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>16%</td>
<td>45%</td>
<td>39%</td>
</tr>
<tr>
<td>USA</td>
<td>17%</td>
<td>54%</td>
<td>29%</td>
</tr>
<tr>
<td>EU5</td>
<td>17%</td>
<td>38%</td>
<td>44%</td>
</tr>
<tr>
<td>Japan</td>
<td>9%</td>
<td>56%</td>
<td>35%</td>
</tr>
<tr>
<td>China</td>
<td>7%</td>
<td>71%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Significantly higher than Global at 95% confidence level
Significantly lower than Global at 95% confidence level

(n=824) (n=155) (n=533) (n=77) (n=59)
Patients in the EU5 are least likely to consider cost as an important factor when determining a treatment plan.
The rising cost of medical devices are impacting purchase plans; Almost one-quarter of HCPs report this as a significant factor.

Impact of rising costs of medical devices

- **Global**
  - Yes, significantly: 28%
  - Yes, to some extent: 52%
  - No: 20%
  - (n=824)

- **USA**
  - Yes, significantly: 26%
  - Yes, to some extent: 52%
  - No: 22%
  - (n=155)

- **EU5**
  - Yes, significantly: 31%
  - Yes, to some extent: 46%
  - No: 23%
  - (n=533)

- **Japan**
  - Yes, significantly: 29%
  - Yes, to some extent: 60%
  - No: 11%
  - (n=77)

- **China**
  - Yes, significantly: 8%
  - Yes, to some extent: 68%
  - No: 24%
  - (n=59)

Q8. Have you seen rising costs of medical device prices impact your practice’s or health system’s medical device purchase plan?
In-office samples have never been more important—the vast majority of HCPs believe samples are significant for initiating treatment plans due to rising costs.

Importance of in-office samples when initiating treatment plans:

- **Global** (n=824): 39% Yes, 61% No
- **USA** (n=155): 38% Yes, 62% No
- **EU5** (n=533): 42% Yes, 58% No
- **Japan** (n=77): 38% Yes, 62% No
- **China** (n=59): 15% Yes, 85% No

- Significantly higher than Global at 95% confidence level
- Significantly lower than Global at 95% confidence level

Q9. Do you feel in-office samples are now more important when initiating treatment plans given the rising cost of treatments?
The importance of DEI in healthcare
The US lags behind the rest of the world in dedicated DEI health initiatives; Respondents globally rate their initiatives as effective.

**Presence of dedicated DEI initiatives for practice/health system**

- **US** (n=155): 39% Yes, 61% No
- **EU5** (n=533): 59% Yes, 41% No
- **Japan** (n=77): 58% Yes, 42% No
- **China** (n=59): 73% Yes, 27% No

**Effectiveness at Achieving Health Equity**

- **US**: Significantly higher than Global at 95% confidence level.
- **EU5**: Significantly higher than Global at 95% confidence level.
- **Japan**: Significantly higher than Global at 95% confidence level.
- **China**: Significantly lower than Global at 95% confidence level.

Q10. Does your practice/health system have a dedicated health equity initiative?
Q11. How effective do you think your practice is at achieving health equity among all patients?
Social platforms can help address diversity, equity and inclusion in healthcare by promoting knowledge and awareness, and providing the global forum for discussion.

Top 5 ways social medical platforms can help address diversity, equity & inclusion in healthcare (n=824)

1. More information sharing/knowledge base - 13%
   - “Promoting knowledge of medical information addressing this issues”

2. Support diversity/variety of participants from different fields/countries/ethnicity - 8%
   - “Promote and invest in more diversity of authors and institutions with different backgrounds”
   - “Through education of healthcare professionals. To make doctors aware that differences exist”

3. Educational programs/CME/Training - 6%
   - “Raising awareness of problems of social inequality”
   - “Raising awareness of issues that affect different groups”

4. More awareness/promotion/advertising/Campaigns - 6%
   - “Helps providers make decisions and discuss injustices in healthcare and closes the gaps in healthcare”

5. Discussions/Debates - 5%

Q12. How can social medical platforms like Sermo help address diversity, equity, and inclusion in healthcare?
The proliferation of AI in healthcare
About one-third of HCPs report experience with AI-assisted tools.
Regardless of experience with AI, most physicians are receptive to AI-assisted tools for a wide range of medical and administrative tasks.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Those with Experience with AI (n=287)</th>
<th>Those without Experience with AI (n=537)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analyze patient information to establish prognosis</td>
<td>80% 15% 5%</td>
<td>61% 29% 10%</td>
</tr>
<tr>
<td>Administrative tasks (like scheduling or documentation)</td>
<td>79% 16% 6%</td>
<td>63% 28% 9%</td>
</tr>
<tr>
<td>Condition monitoring</td>
<td>77% 18% 4%</td>
<td>63% 27% 11%</td>
</tr>
<tr>
<td>Patient diagnosis</td>
<td>72% 19% 9%</td>
<td>59% 27% 13%</td>
</tr>
<tr>
<td>Patient status examination</td>
<td>72% 21% 8%</td>
<td>51% 34% 16%</td>
</tr>
<tr>
<td>Create more transparency in medical diagnosis</td>
<td>70% 23% 7%</td>
<td>58% 31% 11%</td>
</tr>
<tr>
<td>Promoting diversity, equity, and inclusion</td>
<td>69% 23% 8%</td>
<td>51% 36% 13%</td>
</tr>
</tbody>
</table>

Q13. Do you have experience with AI-assisted tools in your practice?
Q14. How receptive are you to AI-based approaches in capabilities based on how valuable they would be to your daily practice.

Very/Somewhat Receptive Neutral Not very/Not at all Receptive
Globally, HCPs believe AI-assisted tools provide the most daily value in analyzing patient information and condition monitoring, but disparities in value seen regionally.

Q15. Please rank these AI-powered capabilities based on how valuable they would be to your daily practice, where rank 1 means the capability would be most valuable.

<table>
<thead>
<tr>
<th># Rank</th>
<th>Analyze patient information to establish prognosis</th>
<th>Condition monitoring</th>
<th>Patient diagnosis</th>
<th>Administrative tasks</th>
<th>Patient status examination</th>
<th>Create more transparency in medical diagnosis</th>
<th>Promoting diversity, equity, and inclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Global (n=824)</td>
<td>USA (n=155)</td>
<td>EU5 (n=533)</td>
<td>Japan (n=77)</td>
<td>China (n=59)</td>
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<td>6</td>
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<td>7</td>
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</tbody>
</table>

Significantly higher than Global at 95% confidence level
Significantly lower than Global at 95% confidence level
Growing patient involvement and choice
When therapeutic benefit is comparable amongst choices, patient choice does influence HCP decisions regarding drug and treatment plans—especially in Japan and China.

**Influence of patients on decision regarding a drug**

- **Top 2 Box**
  - Very influential: 59%
  - Somewhat influential: 59%
  - Neutral: 56%
  - Not very influential: 71%
  - Not at all influential: 69%

- **Base**
  - Very influential: 49%
  - Somewhat influential: 50%
  - Neutral: 47%
  - Not very influential: 53%
  - Not at all influential: 54%

Data Labels <3% not shown

Q16. How influential are patient requests on your decision to select a particular drug if the therapeutic benefit is comparable among the choices?

- Significantly higher than Global at 95% confidence level
- Significantly lower than Global at 95% confidence level
HCPs are somewhat receptive to patients doing their own research

Q17. Are you receptive to patients who “do their own research” for a treatment option or medical device they believe they are a candidate for?

- Yes
- Somewhat
- No

(n=824)

EU5:
- Yes: 27%
- Somewhat: 59%
- No: 14%

(n=533)

US:
- Yes: 34%
- Somewhat: 61%
- No: 6%

(n=155)

China:
- Yes: 42%
- Somewhat: 52%
- No: 6%

(n=77)

China:
- Yes: 19%
- Somewhat: 73%
- No: 8%

(n=59)

Significantly higher than Global at 95% confidence level
Significantly lower than Global at 95% confidence level
Online research leads the way for patients browsing their treatment options—recommendations from friends and family outperform digital or TV ads

Q18. When patients request a specific treatment or medical device, what is the most common source of their information?

Common source of information

<table>
<thead>
<tr>
<th>Source</th>
<th>EU5</th>
<th>US</th>
<th>Global</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online research</td>
<td>44%</td>
<td>41%</td>
<td>47%</td>
<td>55%</td>
</tr>
<tr>
<td>Friend or family</td>
<td>16%</td>
<td>17%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>Social/digital ads</td>
<td>10%</td>
<td>6%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Physician office materials</td>
<td>9%</td>
<td>6%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>TV ad</td>
<td>6%</td>
<td>14%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Influencer/KOL</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Unknown</td>
<td>6%</td>
<td>9%</td>
<td>5%</td>
<td>15%</td>
</tr>
<tr>
<td>Print ad</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
</tr>
</tbody>
</table>

(Base: EU5 = 824, US = 155, Global = 533, Japan = 77, Japan = 59)

- Significantly higher than Global at 95% confidence level
- Significantly lower than Global at 95% confidence level
Prior authorizations are influential for HCPs when prescribing brands—EU5 physicians are least likely to be influenced

**Q19. How much (if at all) do prior authorizations influence your prescribing of brands in both the outpatient and in-patient setting?**

- **Top 2 Box**: 57% (Highly influential), 46% (Influential), 32% (Neutral), 8% (Not very influential), 3% (Not at all influential)
- **Base**:
  - EU5 (n=533): 62% (Highly influential), 52% (Influential), 36% (Neutral), 9% (Not very influential), 3% (Not at all influential)
  - US (n=155): 62% (Highly influential), 48% (Influential), 36% (Neutral), 9% (Not very influential), 3% (Not at all influential)
  - Global (n=824): 57% (Highly influential), 48% (Influential), 32% (Neutral), 10% (Not very influential), 3% (Not at all influential)

EU5 significantly lower than Global at 95% confidence level

**Influence of authorization on prescribing drugs**

- Top 2 Box: Significantly higher than Global at 95% confidence level
- Base: Significantly lower than Global at 95% confidence level
Q20. When you're considering prescribing a product, does the reputation of the life science company (e.g. Bayer, Pfizer, Janssen etc.) influence your prescribing decision?

Reputation of life science companies influencing prescribing decision

**Yes** | **Somewhat** | **No**
---|---|---
EU5 (n=533) | 28% | 55% | 17%
USA (n=155) | 12%† | 59% | 29%↑
Japan (n=77) | 23% | 57% | 19%
China (n=59) | 42%↑ | 53% | 5%↓

*(n=824)*
What’s next?
What does this mean for the healthcare industry?

Key findings

• Physician burnout and fatigue is straining their ability to keep up with increasing demand. Adopting content strategies that align with their preferences helps alleviate additional burdens.

• Inflation is affecting healthcare both for the patients and physicians—cost is an important indicator in choosing which drugs or medical devices are purchased, especially in the US and Asia.

• DEI in healthcare is an important directive for HCPs; however, many practices/health systems do not currently deploy initiatives aimed at addressing this.

• AI-assisted tools are growing in popularity, but few still use this technology daily.

Implications for industry

• Reviewing your content tactics and strategy to align with HCP behavior will ensure better engagement and ROI.

• Prioritizing in-office samples can help encourage HCPs and patients to initiate treatment plans.

• Updating your AI roadmap to address patient care and administrative tasks is the fastest way to increase adoption of new technology.

• Publishing patient-facing online content and testimonials reinforces trust and will be more likely to influence patients and their HCPs when discussing care options.

• Physician peer-to-peer networks are trusted far more than general platforms, helping you reach your audience where they are already consuming relevant industry content.
Thank you

To learn how Sermo can support your HCP insights and engagement goals, email us at business@sermo.com