HCP Sentiment Series Part 9

Inflation, DEI, AI & Patient Choice in Healthcare

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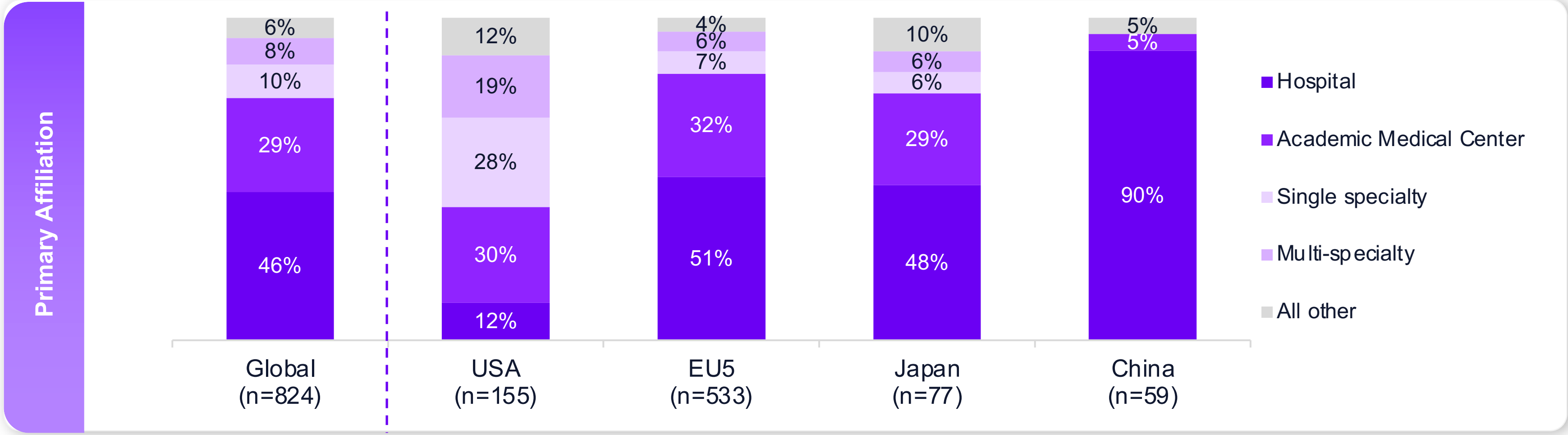
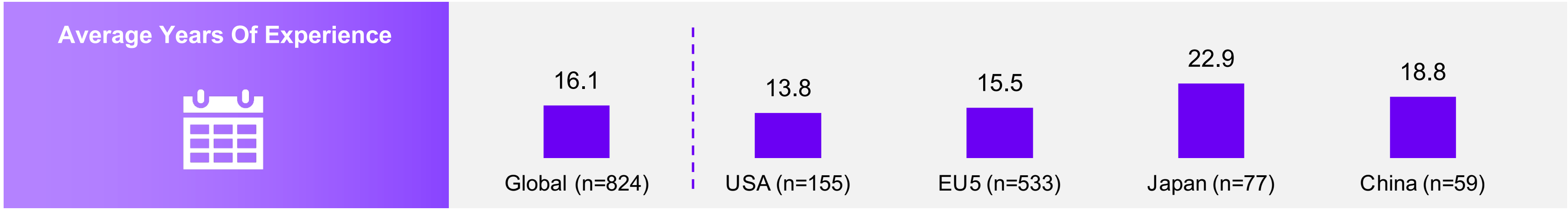
Sermo's HCP Sentiment Study: Part 9 research overview

- 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**

Country	Sample
USA	155
Italy	119
Spain	117
UK	110
Germany	95
France	92
Japan	77
China	59
Specialty	**Sample**
HemOnc	134
Neurology	126
Cardiology	125
Gastroenterology	122
Endocrinology	119
Dermatology	112
Primary Care Physician	86

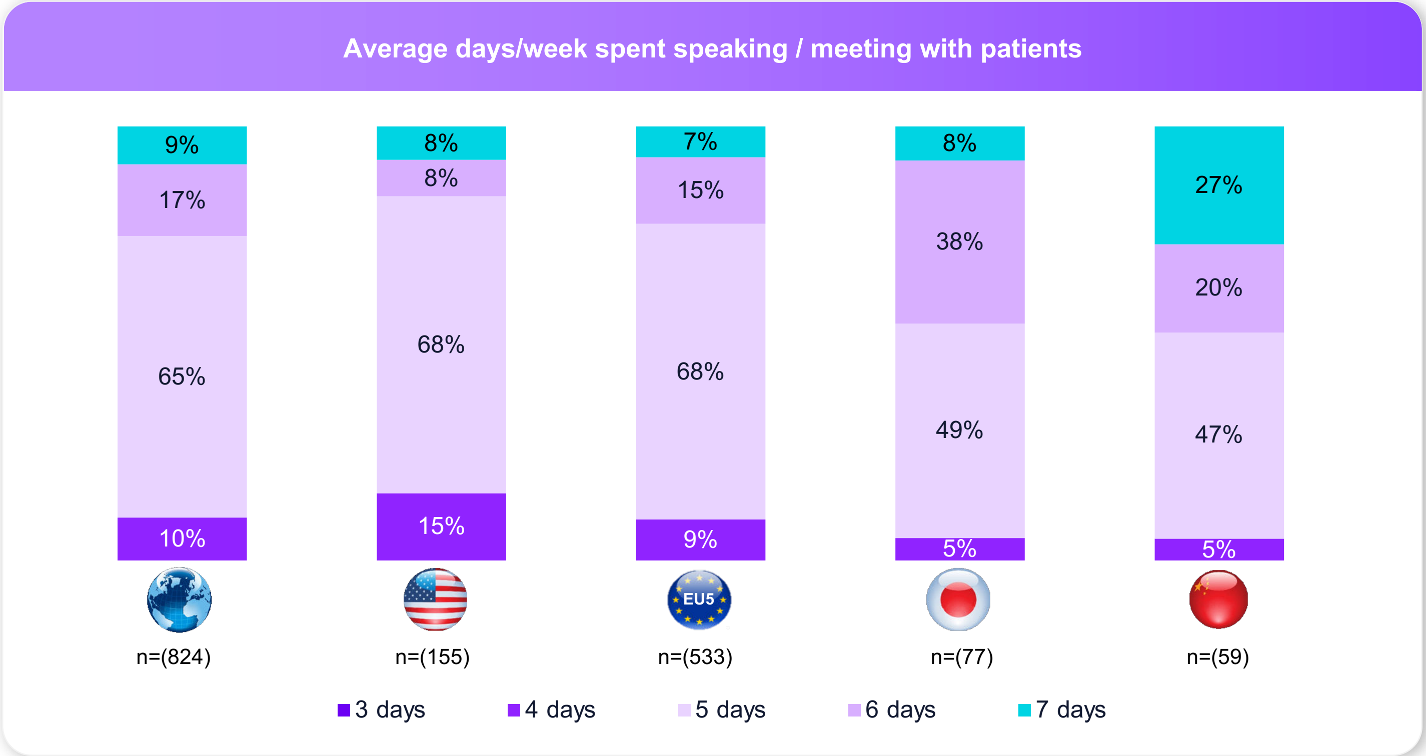
Sermo's HCP Sentiment Study: Respondent profile





S2. What is your primary practice setting?
S4. With what type of institution do you have your primary affiliation or employment?

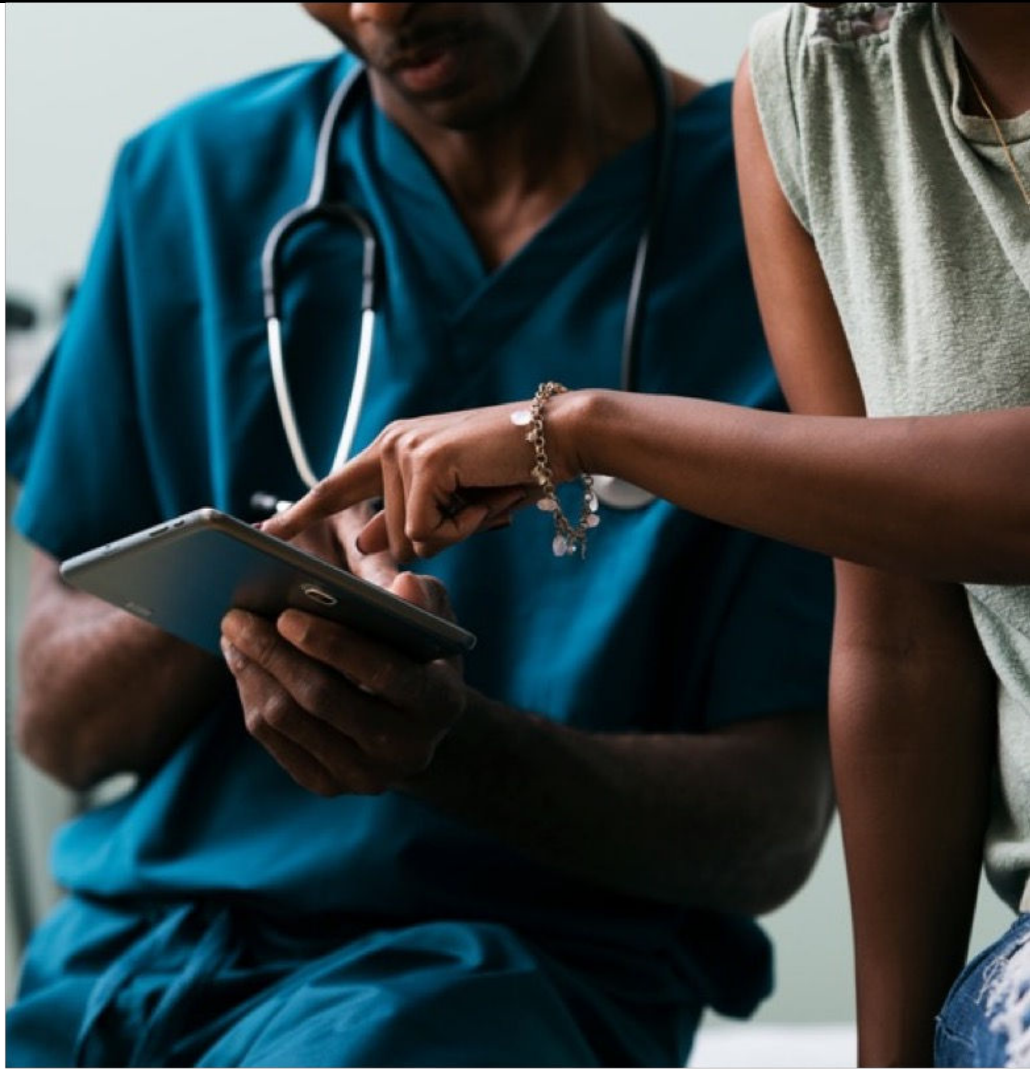
Sermo's HCP Sentiment Study: Respondent profile



S3. How many years have you been in practice in your specialty?

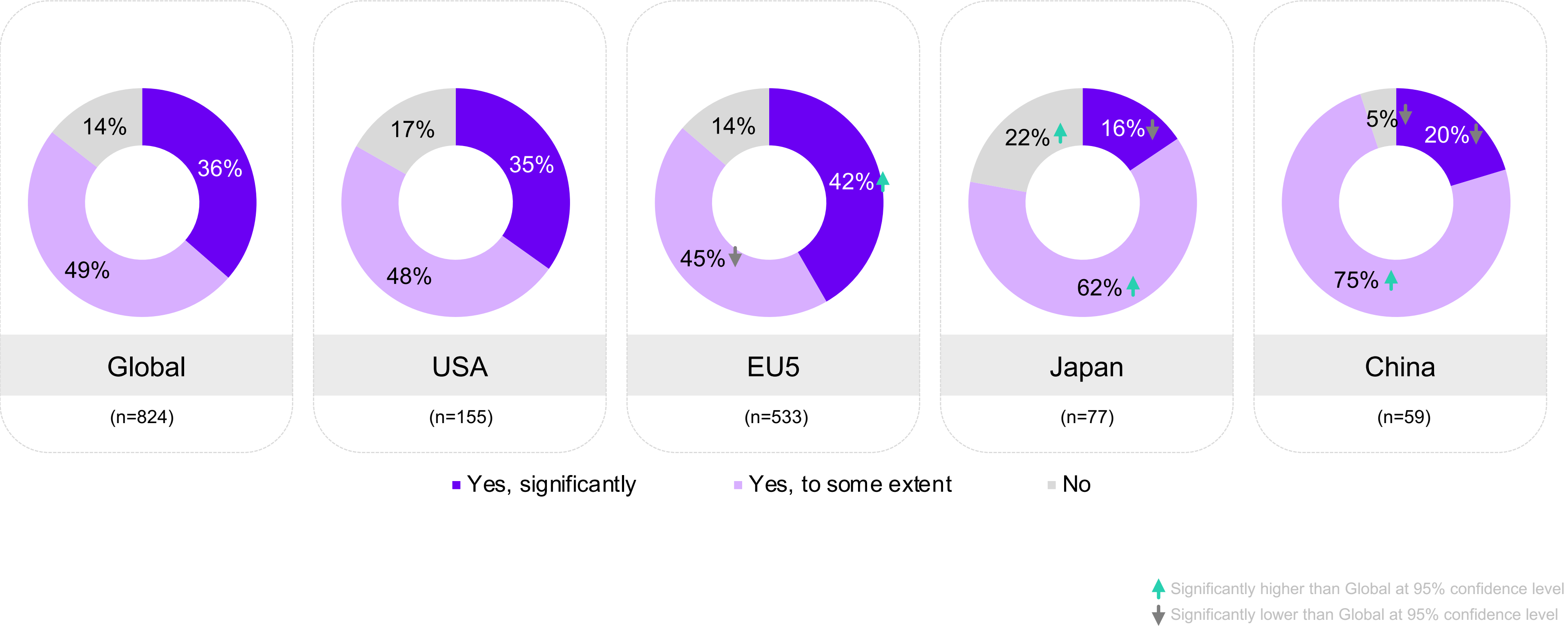
Significantly higher than Global at 95% confidence level
Significantly lower than Global at 95% confidence level

Pharma and physician engagement



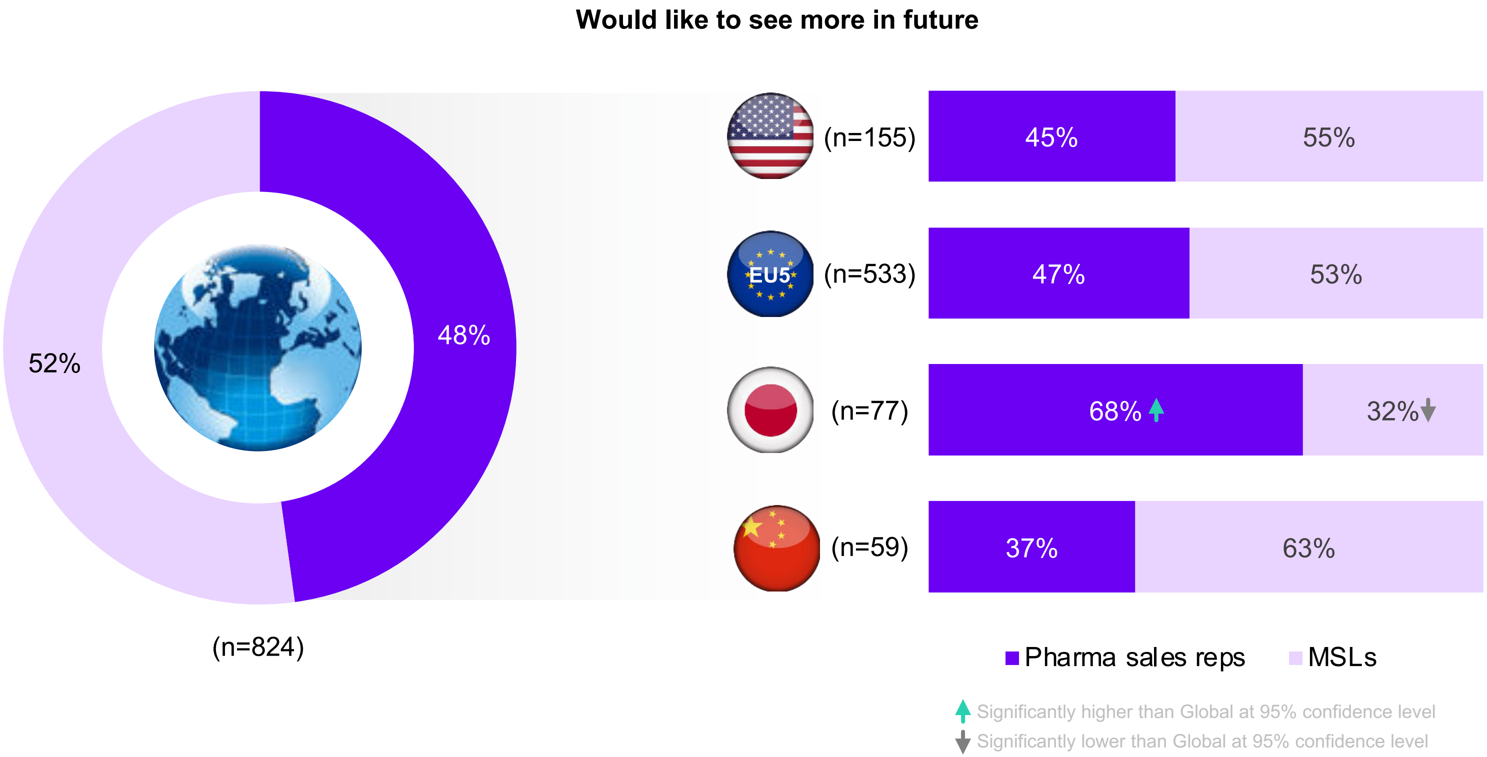
Globally, HCPs are reporting burnout and fatigue impacting their ability to keep up with patient volume

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



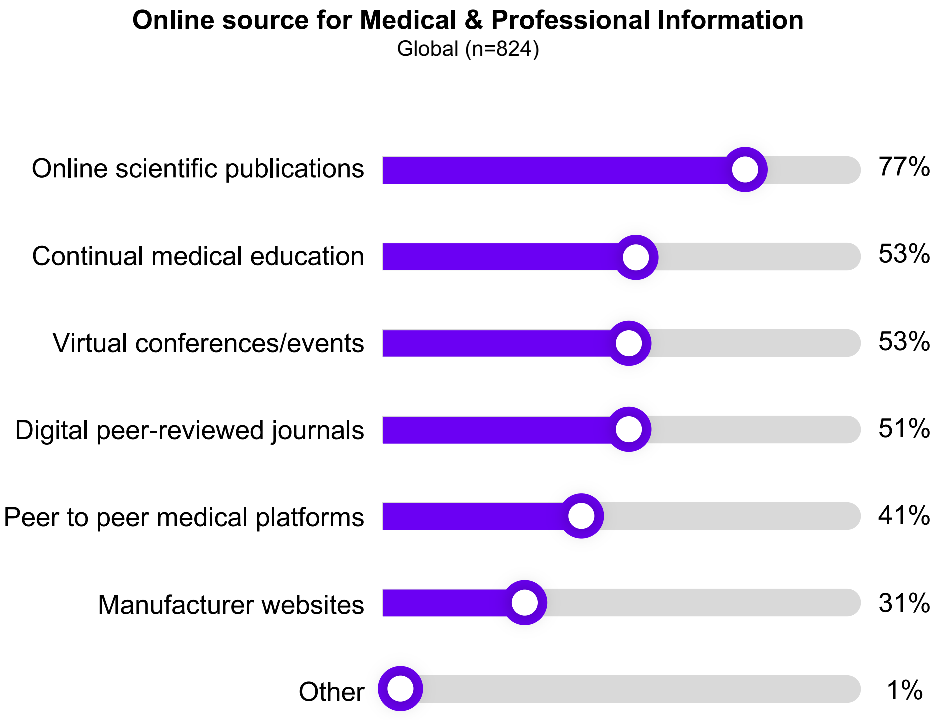
Q3. Have you seen the impacts of HCP burnout and fatigue negatively affect your or your colleagues' ability to return to normal volumes of patient care/patient traffic?

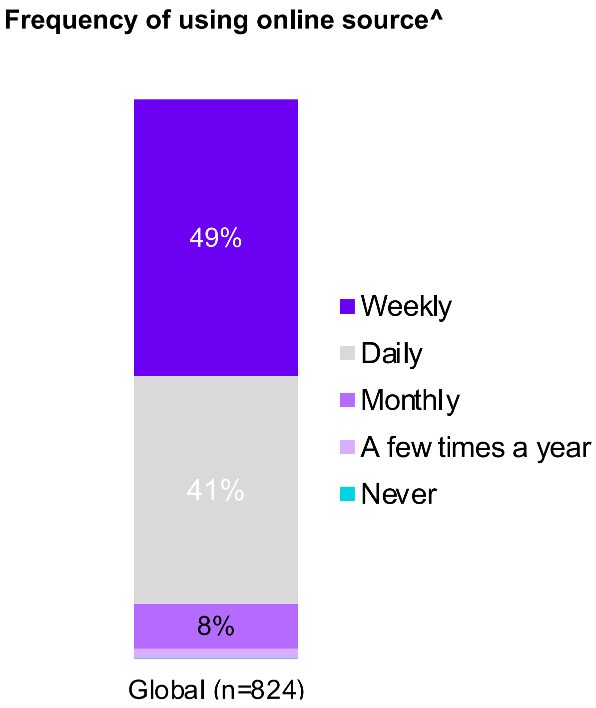
Globally, physicians slightly prefer to see more Medical Science Liaisons (MSLs); however, in Japan, sales reps are significantly more popular



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

HCPs turn to online publications for medical/professional information





^Data Labels <3% not shown
Q4. Where do you typically go online to look for medical & professional information?
Q5. How frequently do you look for medical & professional information online?

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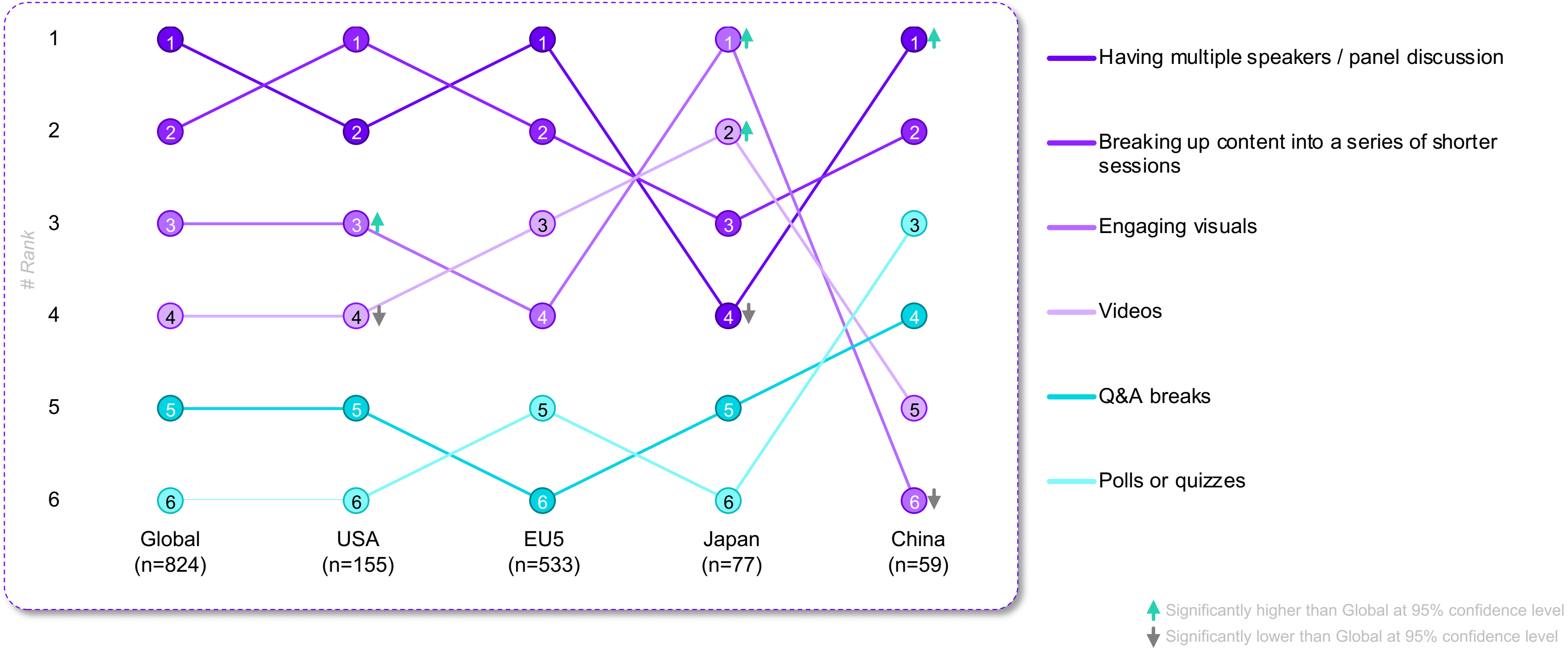
Virtual engagement strategies are still relevant when selling to HCPs; Multiple speakers and shorter content sessions lead the way in maintaining physicians' attention

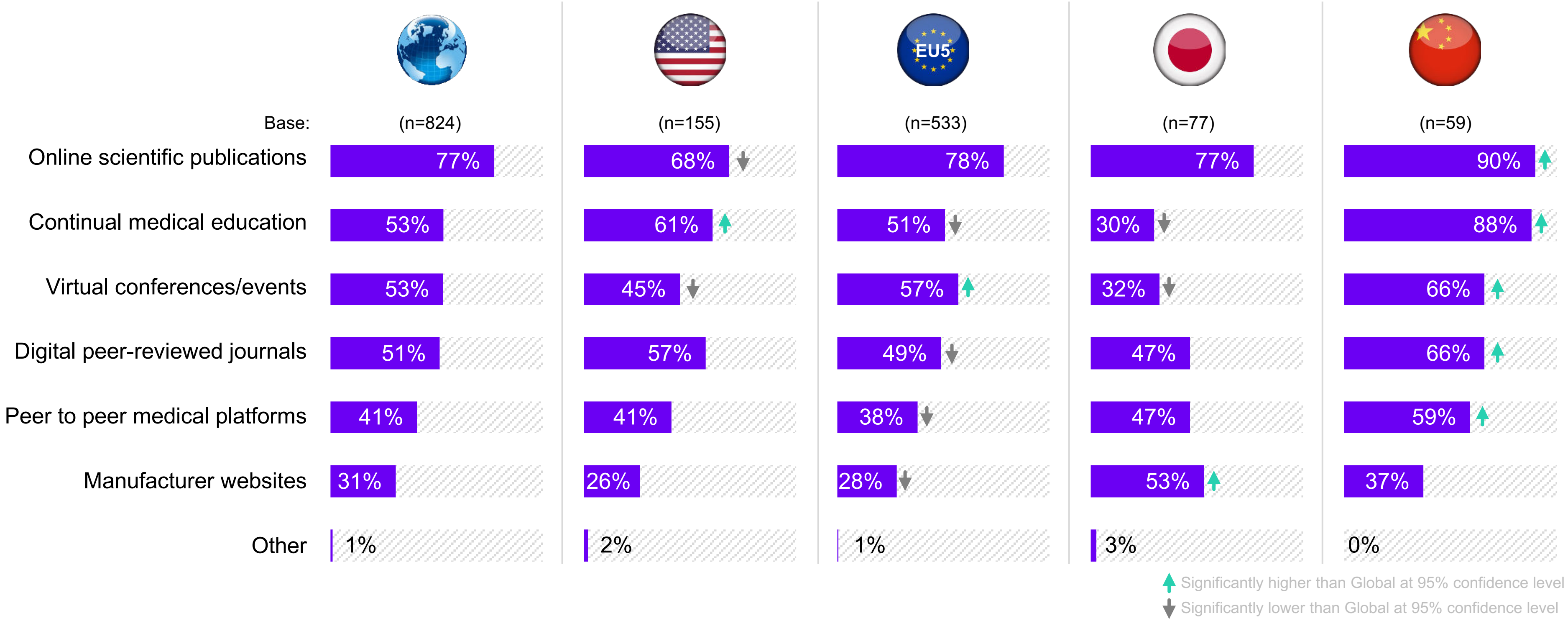
Effective strategies for engagement during virtual programs



Q2. In your experience, what are the most effective strategies manufacturers can use to keep you engaged during virtual programs like webinars?

Across geography, online scientific publications are relied on by HCPs for access to new information

Online source for Medical & Professional Information

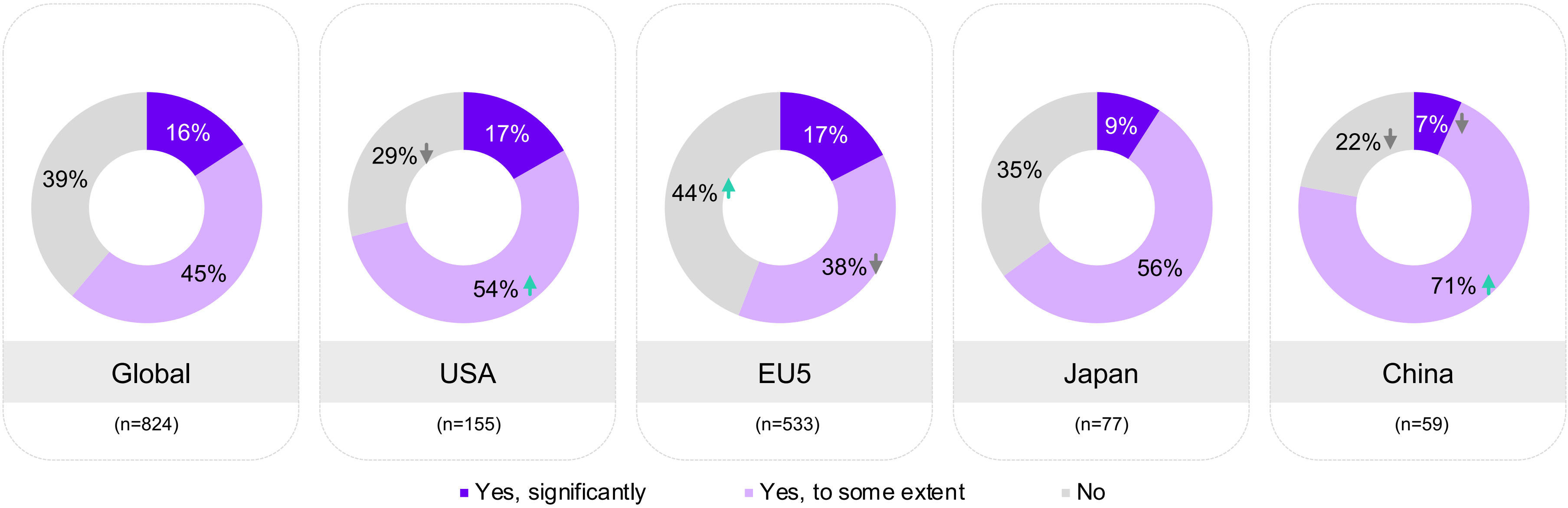


Q4. Where do you typically go online to look for medical & professional information?

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

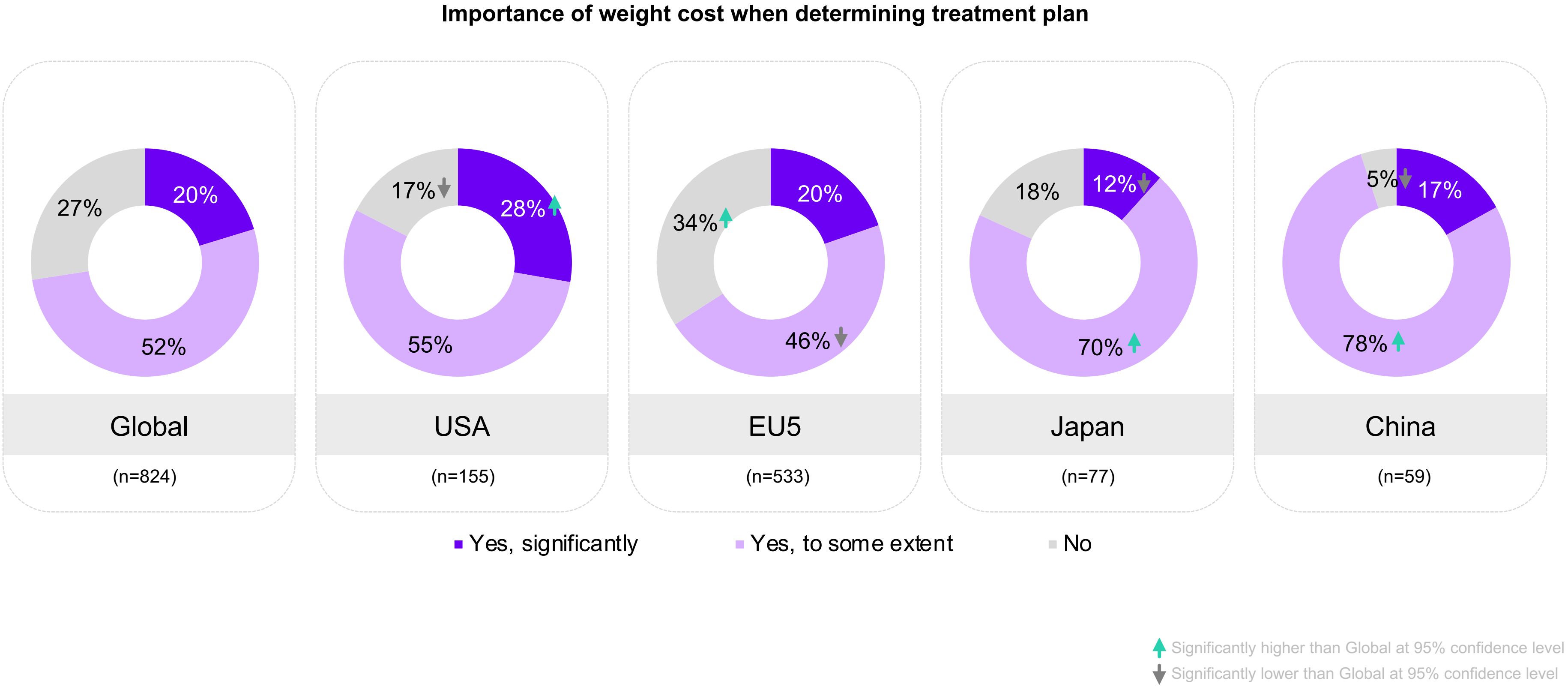
Patients stopping/postponing procedures due to increase in healthcare prices



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

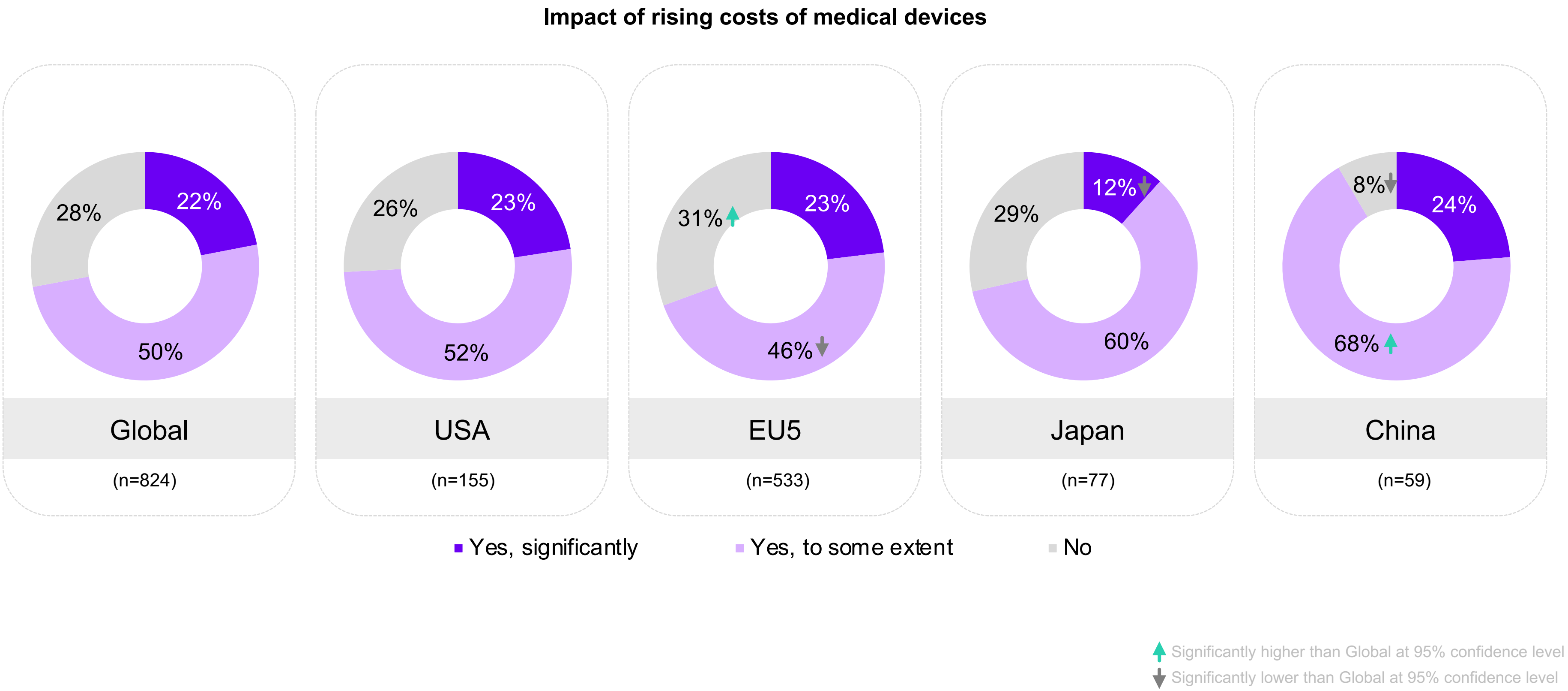
Q6. Are you seeing patients stopping or postponing treatment or procedures due to rising healthcare prices?

Patients in the EU5 are least likely to consider cost as an important factor when determining a treatment plan



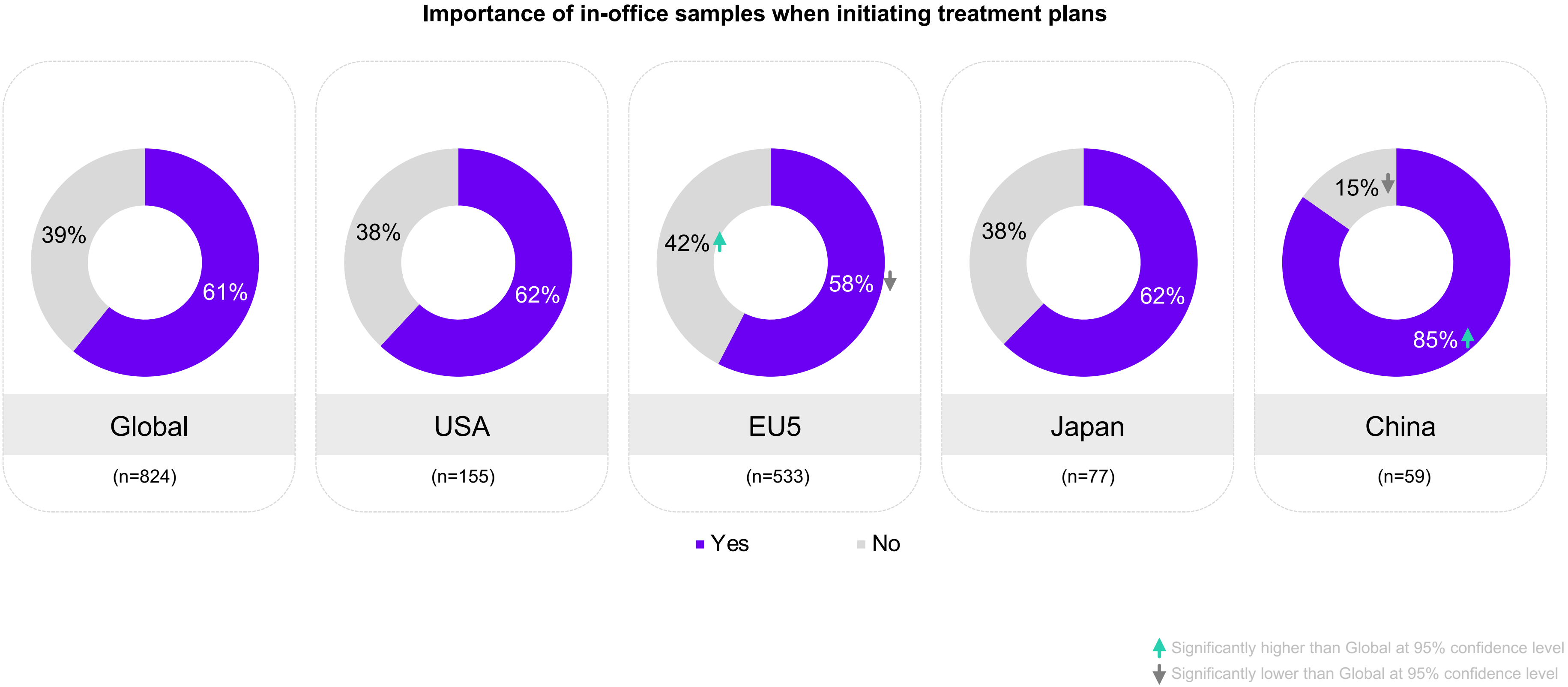
Q7. Are you seeing patients weigh cost as a more important factor when determining a treatment plan?

The rising cost of medical devices are impacting purchase plans; Almost one-quarter of HCPs report this as a significant factor



Q8. Have you seen rising costs of medical device prices impact your practice's or health system's medical device purchase plan?

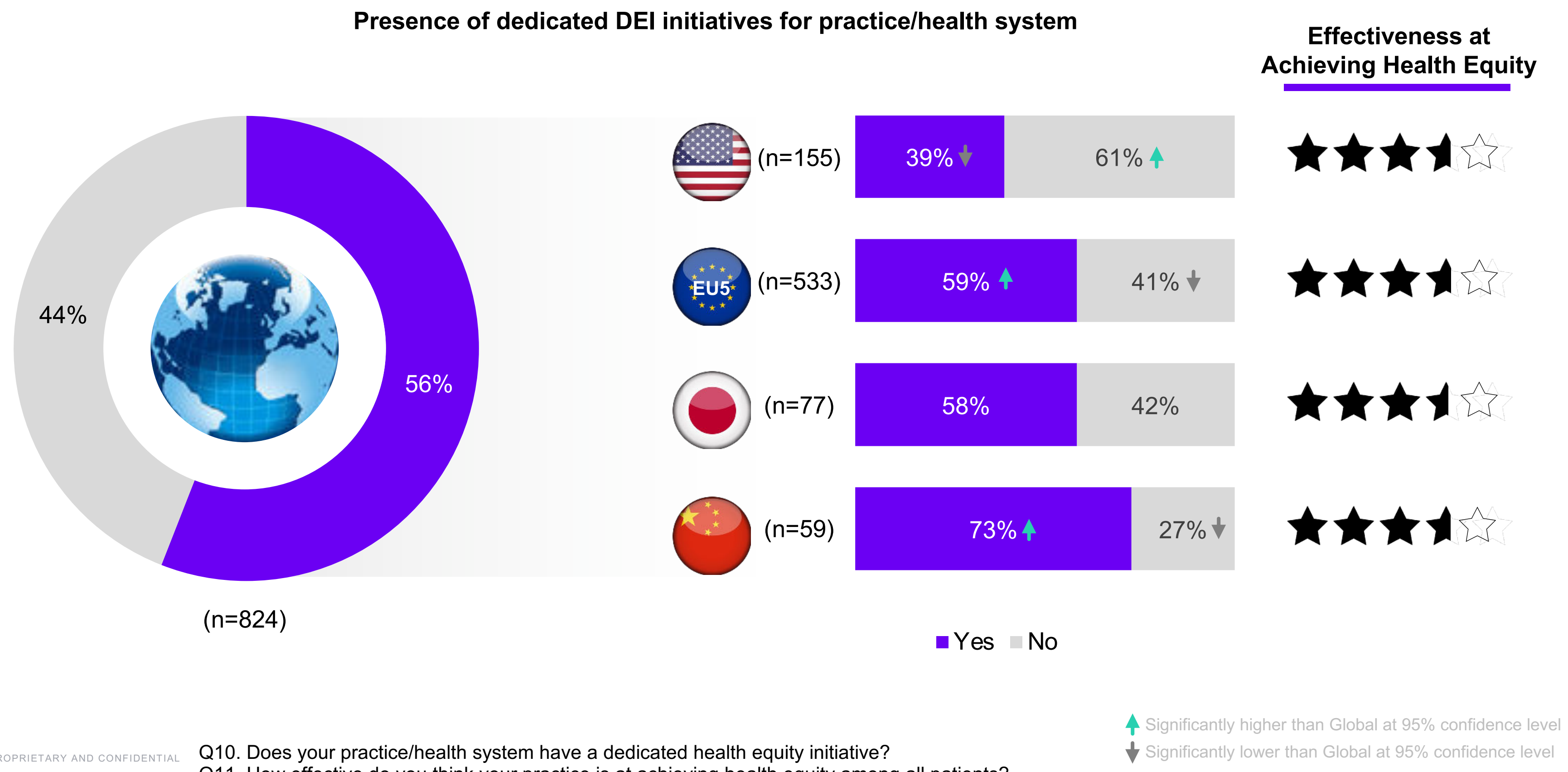
In-office samples have never been more important—the vast majority of HCPs believe samples are significant for initiating treatment plans due to rising costs



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



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?

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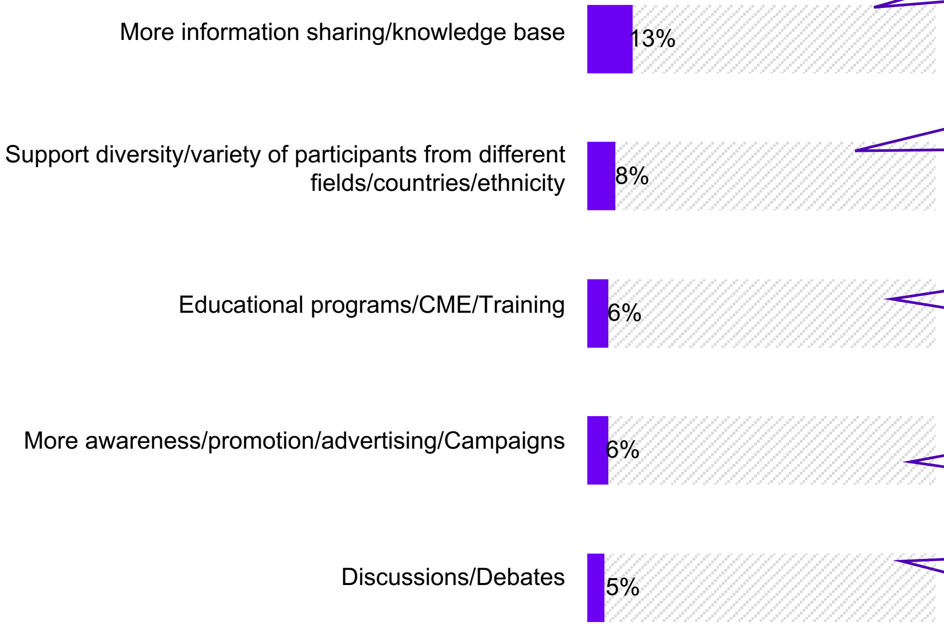
Social platforms can help address diversity, equity and inclusion in healthcare by promoting knowledge and awareness, and providing the global forum for discussion

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



“Promoting knowledge of medical information addressing this issues”

“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”

“Raising awareness of problems of social inequality”
“Raising awareness of issues that affect different groups”

“Helps providers make decisions and discuss injustices in healthcare and closes the gaps in healthcare”

Q12. How can social medical platforms like Sermo help address diversity, equity, and inclusion in healthcare?

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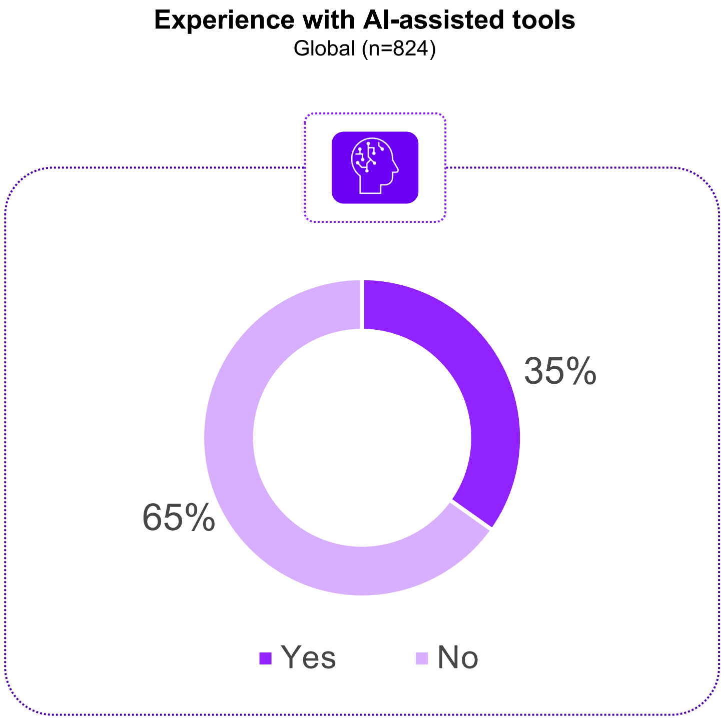
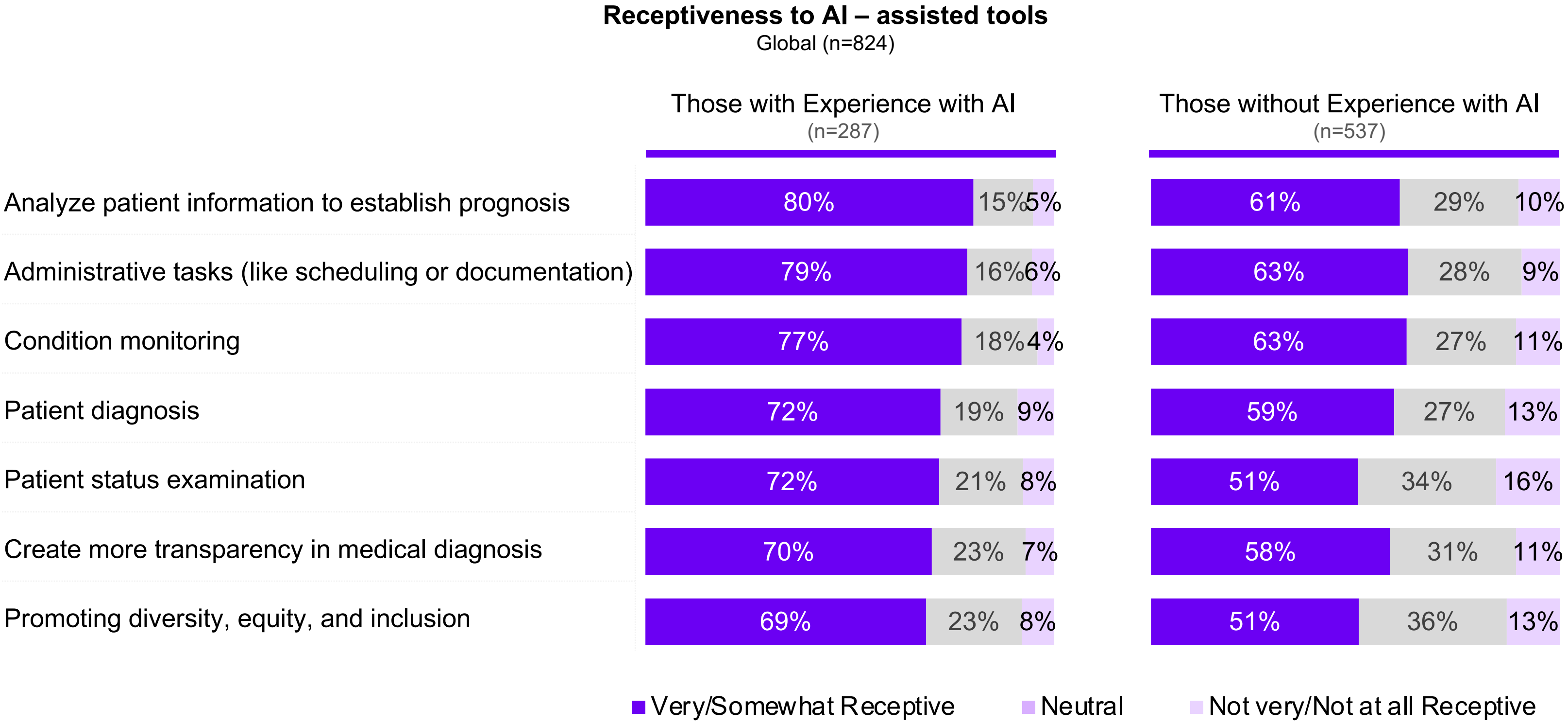
The proliferation of AI in healthcare

About one-third of HCPs report experience with AI-assisted tools



Q13. Do you have experience with AI-assisted tools in your practice?

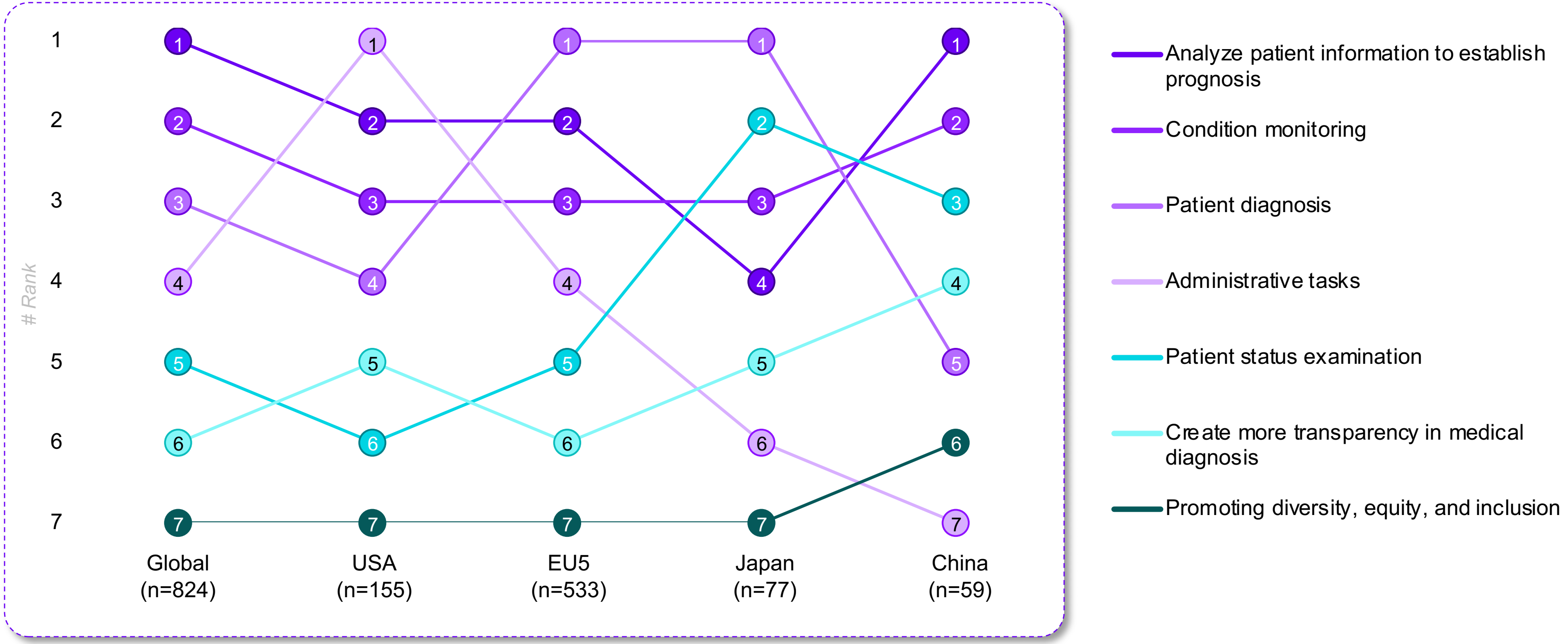
Regardless of experience with AI, most physicians are receptive to AI-assisted tools for a wide range of medical and administrative tasks



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.

Globally, HCPs believe AI-assisted tools provide the most daily value in analyzing patient information and condition monitoring, but disparities in value seen regionally

Value of AI-powered capabilities in daily practice

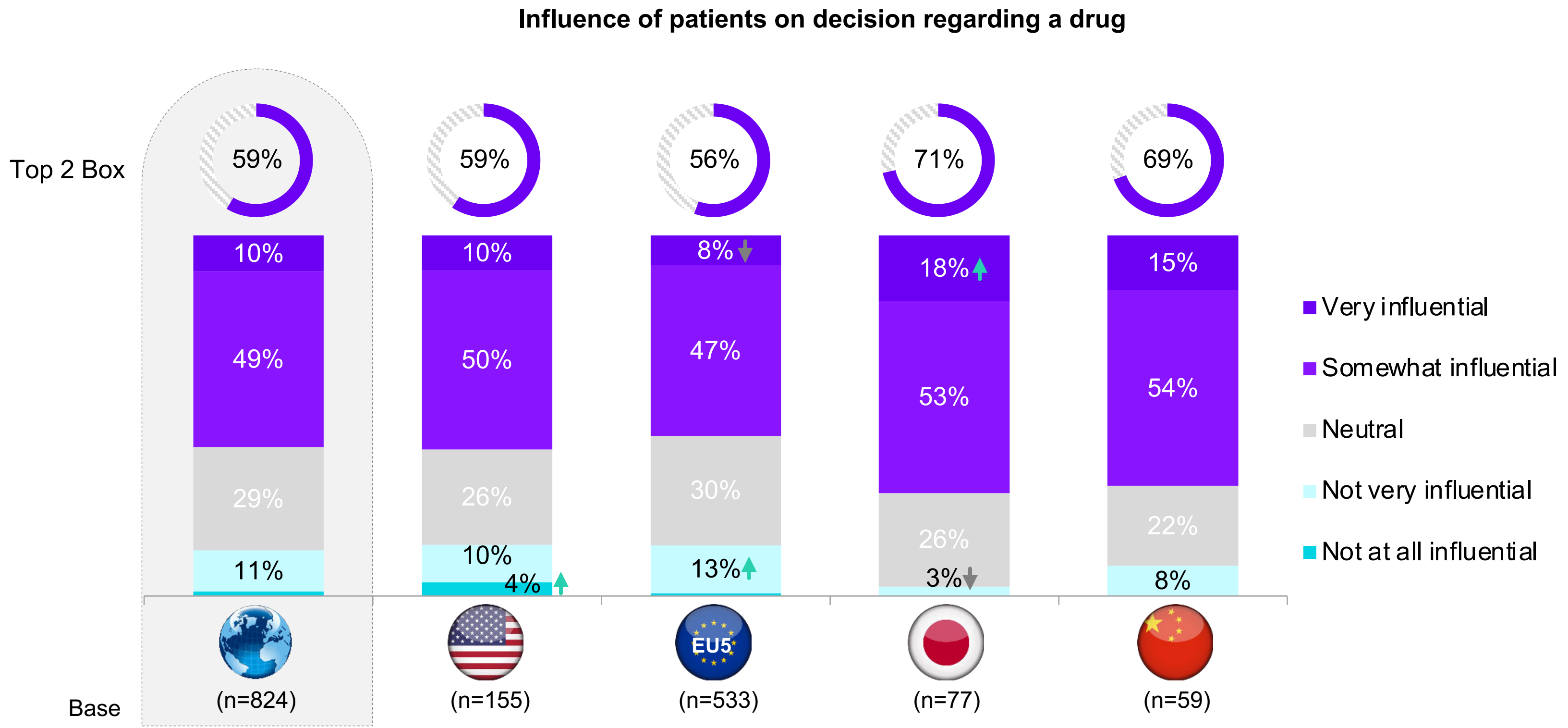


Significantly higher than Global at 95% confidence level
Significantly lower than Global at 95% confidence level

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..

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



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

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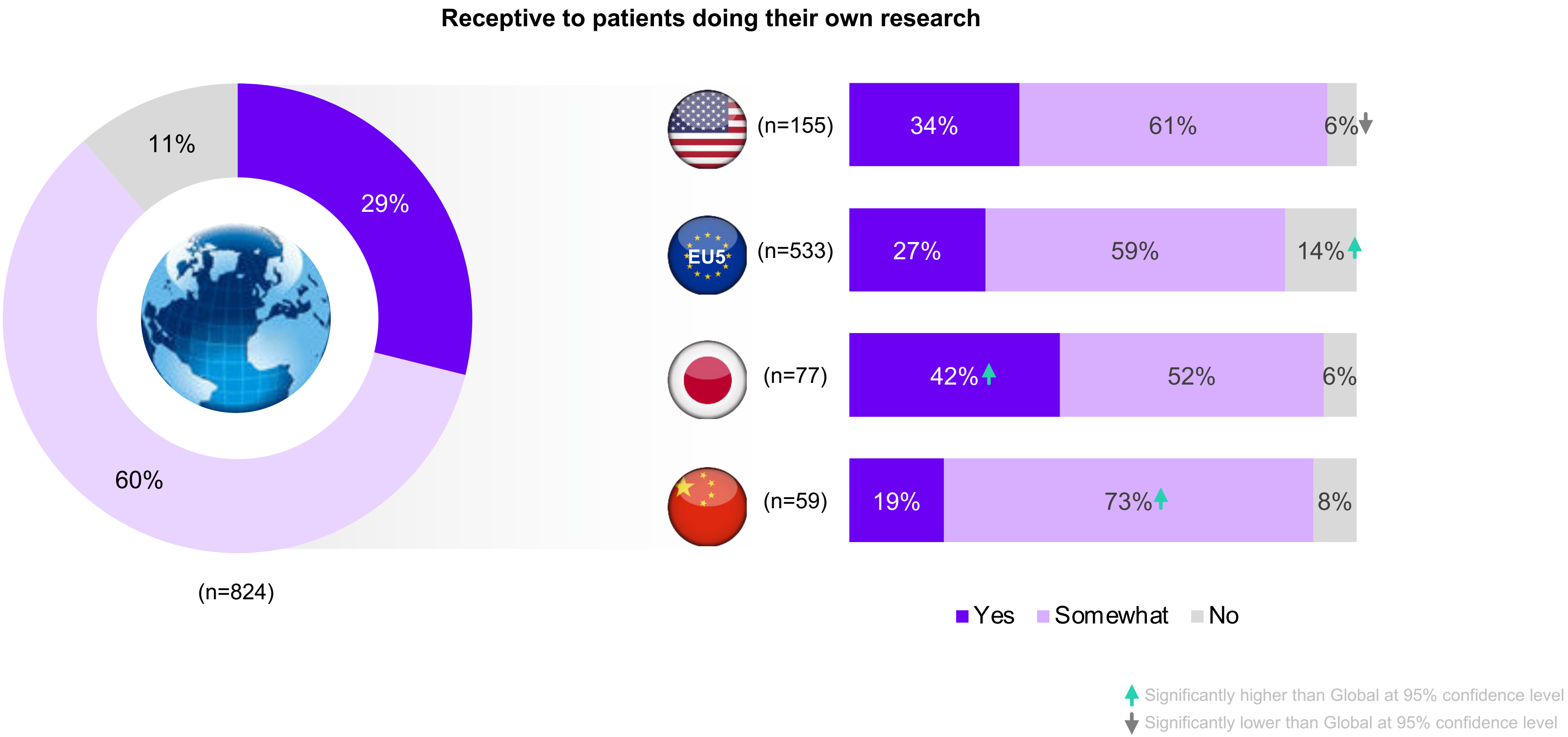
HCPs are somewhat receptive to patients doing their own research



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?

Online research leads the way for patients browsing their treatment options—recommendations from friends and family outperform digital or TV ads

Common source of information

Base:	Global (n=824)	US (n=155)	EU5 (n=533)	Japan (n=77)	China (n=59)
Online research	44%	41%	47% ↑	55% ↑	14% ↓
Friend or family	16%	17%	17%	12%	14%
Social/digital ads	10%	6% ↓	11%	10%	20% ↑
Physician office materials	9%	6%	8%	5%	25% ↑
TV ad	6%	14% ↑	4% ↓	4%	8%
Influencer/KOL	6%	5%	6%	4%	15% ↑
Unknown	6%	9% ↑	5%	8%	2%
Print ad	2%	2%	3%	0%	0%
Other	1%	1%	1%	3%	2%

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

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

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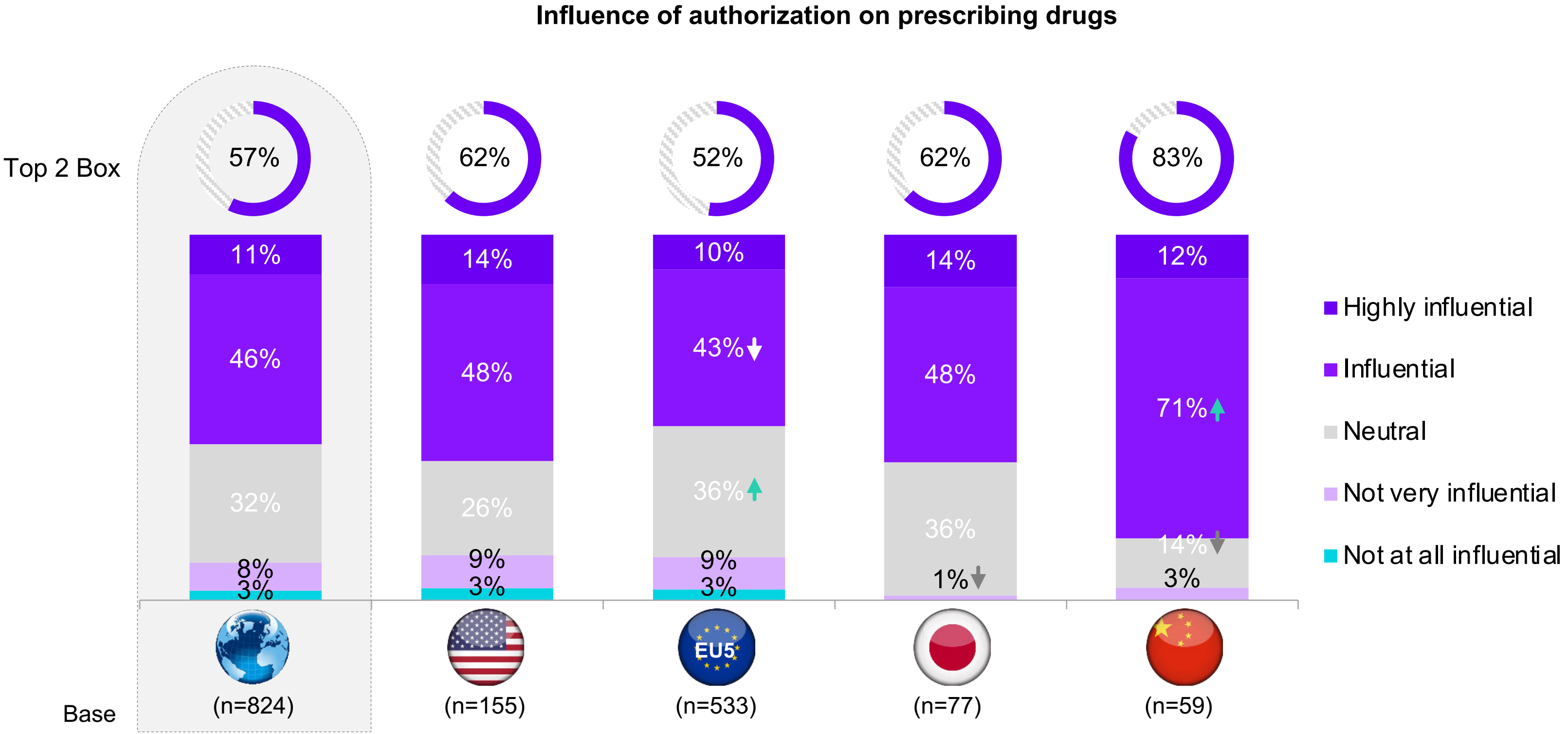
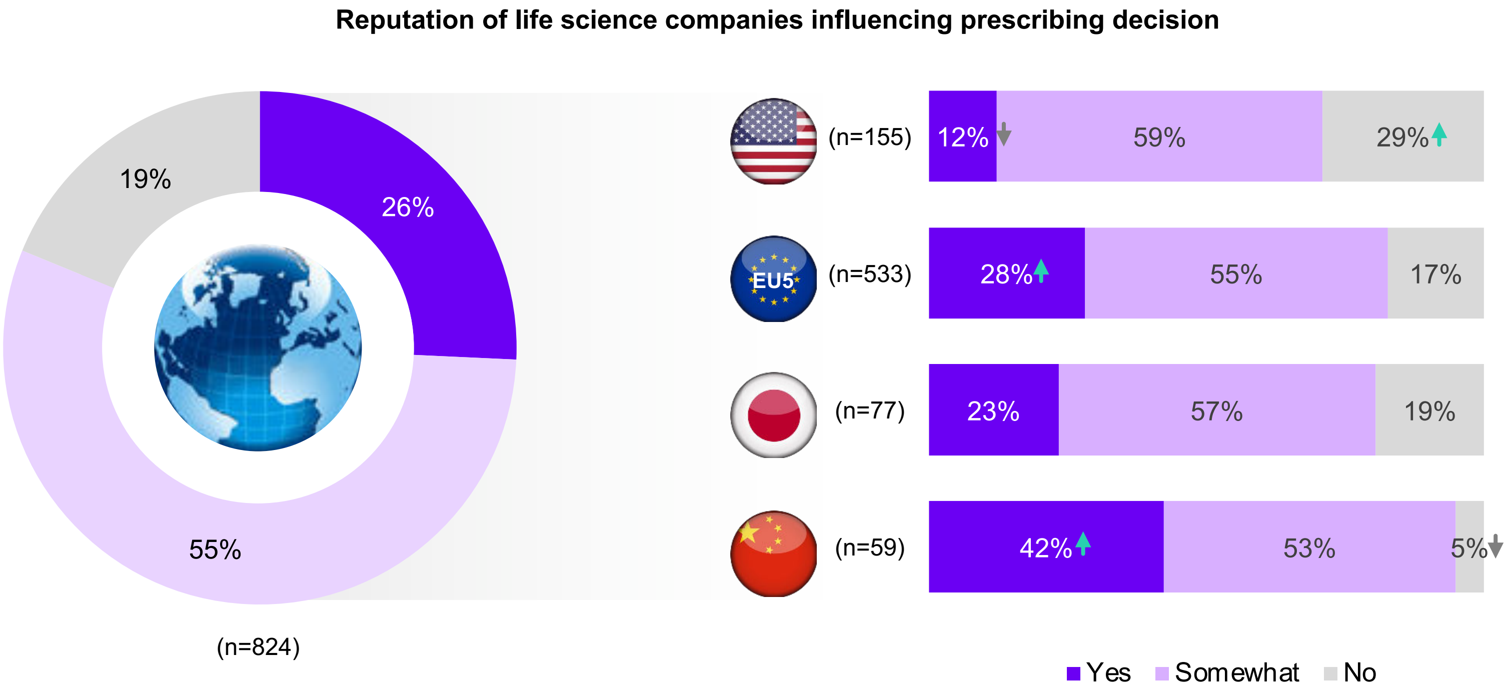
Prior authorizations are influential for HCPs when prescribing brands—EU5 physicians are least likely to be influenced



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

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

Life science company reputation influences prescribing decisions



Significantly higher than Global at 95% confidence level

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?

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