HCP Sentiment Series Part 10

Insights for 2023 on HCP content habits and best practices

Published December 2022
You ask, we deliver: insights to support more impactful, efficient physician engagement

This report will uncover new physician perspectives on topics YOU asked about

1. Being a good partner and information provider to your customers
2. Understanding what topics and channels are most important for physicians
3. Implementing impactful patient support through HCPs
Sermo’s HCP Sentiment Study: Part 10 research overview

- Questions were solicited from Sermo clients and fielded October 2022
- Sermo invited physicians to participate among a list of 7 specialties across 8 countries
- Total sample: 899

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>318</td>
</tr>
<tr>
<td>China</td>
<td>148</td>
</tr>
<tr>
<td>Japan</td>
<td>128</td>
</tr>
<tr>
<td>UK</td>
<td>103</td>
</tr>
<tr>
<td>Spain</td>
<td>63</td>
</tr>
<tr>
<td>Italy</td>
<td>60</td>
</tr>
<tr>
<td>Germany</td>
<td>42</td>
</tr>
<tr>
<td>France</td>
<td>39</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Specialty</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>HemOnc</td>
<td>159</td>
</tr>
<tr>
<td>Cardiology</td>
<td>157</td>
</tr>
<tr>
<td>Gastroenterology</td>
<td>128</td>
</tr>
<tr>
<td>Endocrinology</td>
<td>127</td>
</tr>
<tr>
<td>Neurology</td>
<td>127</td>
</tr>
<tr>
<td>Dermatology</td>
<td>112</td>
</tr>
<tr>
<td>Primary Care</td>
<td>89</td>
</tr>
</tbody>
</table>
### Sermo’s HCP Sentiment Study 10: Respondent profile

#### Primary Affiliation

- **Global** (n=899)
  - Hospital: 3%
  - Academic Medical Center: 2%
  - Single specialty group practice: 7%
  - Multi-specialty group practice: 2%
  - All other: 6%

- **USA** (n=318)
  - Hospital: 15%
  - Academic Medical Center: 7%
  - Single specialty group practice: 12%
  - Multi-specialty group practice: 13%
  - All other: 8%

- **EU5** (n=307)
  - Hospital: 15%
  - Academic Medical Center: 5%
  - Single specialty group practice: 31%
  - Multi-specialty group practice: 5%
  - All other: 9%

- **Japan** (n=128)
  - Hospital: 15%
  - Academic Medical Center: 8%
  - Single specialty group practice: 34%
  - Multi-specialty group practice: 41%
  - All other: 8%

- **China** (n=146)
  - Hospital: 15%
  - Academic Medical Center: 5%
  - Single specialty group practice: 35%
  - Multi-specialty group practice: 40%
  - All other: 9%

#### Average Years Of Experience

- **Global** (n=899)
  - Primary Affiliation: 16.1 years
  - USA (n=318): 15.9 years
  - EU5 (n=307): 15.5 years
  - Japan (n=128): 22.0 years
  - China (n=146): 17.1 years

S3. With what type of institution do you have your primary affiliation or employment?

S1. How long have you been practicing in your current specialty?
Being a good partner and information provider to your customers
Globally, HCPs view pharma companies as a credible source for disease state information and understanding of the needs of physicians.

**Pharmaceutical industry is a credible source for disease-state information**

- Percentage of physicians agreeing: 66%
- Percentage of physicians disagreeing: 15%
- Percentage of physicians being neutral: 19%

*(n=899)*

**Pharma companies understand what I and my fellow MDs need from them**

- Percentage of physicians strongly/agreeing: 65%
- Percentage of physicians somewhat/agreeing: 22%
- Percentage of physicians disagreeing: 14%
- Percentage of physicians being neutral: 10%

*(n=899)*

In Japan, higher agreement (83%) with pharma being credible.

In Japan and China, higher agreement (75% and 76%) with pharma understanding MD needs.

Q1C1. To what extent do you agree or disagree with the following statements:
1. Pharmaceutical industry is a credible source for disease-state information;
2. Pharma companies understand what I and my fellow MDs need from them.
Globally, physicians visit pharmaceutical / biotech websites to check indications of use for drugs or therapies, learn about new drugs or about clinical trials

Primary reason for visiting pharmaceutical and biotech company websites (% of physicians indicating each reason)

Q2C1. What is the primary reason you visit pharmaceutical and biotech company websites?
HCPs generally suggest pharma marketers continue to be seen at congresses and be heard with success stories, though there is wide regional variability

Respondents’ advice for pharma marketers on what to continue doing (% of physicians advising each activity)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Global (n=899)</th>
<th>US (n=318)</th>
<th>EU (n=307)</th>
<th>Japan (n=128)</th>
<th>China (n=146)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinical data success stories</td>
<td>#T-1 (28%)</td>
<td>#2 (26%)</td>
<td>#3 (21%)</td>
<td>#1 (36%)</td>
<td>#1 (42%)</td>
</tr>
<tr>
<td>Presence at medical congresses</td>
<td>#T-1 (28%)</td>
<td>#3 (23%)</td>
<td>#1 (39%)</td>
<td>#2 (28%)</td>
<td>#3 (16%)</td>
</tr>
<tr>
<td>Diagnosis tools and calculators</td>
<td>#3 (22%)</td>
<td>#1 (29%)</td>
<td>#2 (24%)</td>
<td>#4 (15%)</td>
<td>#4 (9%)</td>
</tr>
<tr>
<td>Personalized content</td>
<td>#4 (21%)</td>
<td>#4 (21%)</td>
<td>#4 (16%)</td>
<td>#3 (21%)</td>
<td>#2 (33%)</td>
</tr>
</tbody>
</table>

Q3C1. If pharma marketers were to continue to do just one thing, what would you advise that to be?
**Looking forward to 2023:** Pharma companies should focus on clinical trial data and medical congresses

34% of physicians feel pharma doesn’t understand what they need

To better align with the needs of your customers, we recommend conducting more primary research to understand unmet needs and build your strategy around fulfilling those.

Be seen and be heard

HCPs want pharma companies to continue attending medical congresses and sharing clinical data success stories—so make your presence felt in 2023!

Keep in mind:

- Globally, HCPs value **clinical data success stories**
- US physicians look to pharma to **supply tools to assist their practice** more than for information
- **73% of physicians** are more likely to engage with communication when it’s personalized*

*Sermo HCP Sentiment Series Part 7*
Understanding what topics and channels are most important for physicians
Globally, except in Japan, the most preferred source for medical information is online scientific publications. In Japan, pharma reps continue to be a source of info and in China, KOLs are a top source.

Top 3 preferred sources for medical information

<table>
<thead>
<tr>
<th>Source</th>
<th>Country Example</th>
<th>Global Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online scientific publications</td>
<td>(n=899)</td>
<td>1.</td>
</tr>
<tr>
<td>Conferences/events</td>
<td>(n=318)</td>
<td>2.</td>
</tr>
<tr>
<td>Employer</td>
<td>(n=307)</td>
<td>3.</td>
</tr>
<tr>
<td>Conference/events</td>
<td>(n=128)</td>
<td>1.</td>
</tr>
<tr>
<td>Pharma reps</td>
<td>(n=146)</td>
<td>2.</td>
</tr>
<tr>
<td>International &amp; regional KOLs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical organizations</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In Japan, online scientific publication is not a top source. Sales reps are a top source, underscoring importance of this channel in Japan for new info.

In China, a top source is KOLs, underscoring importance of this channel in China for new info.
Globally, most searched health-related topics using online search engines

<table>
<thead>
<tr>
<th>Topic</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical research / data</td>
<td>64%</td>
</tr>
<tr>
<td>Treatment information</td>
<td>60%</td>
</tr>
<tr>
<td>Condition / disease information</td>
<td>53%</td>
</tr>
<tr>
<td>Breaking medical news</td>
<td>40%</td>
</tr>
<tr>
<td>Diagnosis support</td>
<td>37%</td>
</tr>
<tr>
<td>Finding peers / KOLs</td>
<td>22%</td>
</tr>
</tbody>
</table>

(n=899)

Q3C5. What health-related topics do you usually search for using online search engines?
Globally, events / congresses, physician-only medical platforms, and peers are most influential for treatment decisions

<table>
<thead>
<tr>
<th>Content Channels</th>
<th>Global (n=899)</th>
<th>EU (n=307)</th>
<th>China (n=146)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events &amp; congresses</td>
<td>63%</td>
<td>53%</td>
<td>84%</td>
</tr>
<tr>
<td>Physician-only medical platforms</td>
<td>46%</td>
<td>45%</td>
<td>57%</td>
</tr>
<tr>
<td>Peers</td>
<td>45%</td>
<td>51%</td>
<td>67%</td>
</tr>
<tr>
<td>Pharma brand websites</td>
<td>20%</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>Direct sales outreach</td>
<td>18%</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>General social media</td>
<td>13%</td>
<td>35%</td>
<td>13%</td>
</tr>
<tr>
<td>Email marketing</td>
<td>12%</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>None</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Globally, events / congresses, physician-only medical platforms, and peers are most influential for treatment decisions.

In China, peers / KOLs continue to be highly influential channel.

In EU, continued importance of events / congress for what pharma marketers should continue to be doing.

<table>
<thead>
<tr>
<th>Country</th>
<th>Event/congress</th>
<th>Physician-only Medical Platforms</th>
<th>Peers</th>
<th>Pharma Brand Websites</th>
<th>Direct Sales Outreach</th>
<th>Email Marketing</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>63%</td>
<td>46%</td>
<td>45%</td>
<td>20%</td>
<td>18%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>EU</td>
<td>53%</td>
<td>49%</td>
<td>51%</td>
<td>18%</td>
<td>22%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>China</td>
<td>84%</td>
<td>57%</td>
<td>67%</td>
<td>27%</td>
<td>20%</td>
<td>21%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Globally, efficacy and safety, and clinical trial data are the primary information types that drive treatment decision-making.

<table>
<thead>
<tr>
<th>Information Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficacy and safety data</td>
<td>46%</td>
</tr>
<tr>
<td>Clinical trial data</td>
<td>40%</td>
</tr>
<tr>
<td>Validation and proof from peers in the medical community</td>
<td>8%</td>
</tr>
<tr>
<td>Patient preferences for certain drugs or therapies</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q1C2. What information is the most important to you regarding a new treatment decision?
Globally, physicians are most likely to engage with thought leadership content and presentations / new research focus and data on social media

**Medical topics HCPs engage with on social media the most**

<table>
<thead>
<tr>
<th>#1</th>
<th>New research focus and data</th>
</tr>
</thead>
<tbody>
<tr>
<td>#2</td>
<td>Specialty-specific healthcare education and updates</td>
</tr>
<tr>
<td>#3</td>
<td>Patient success stories</td>
</tr>
</tbody>
</table>

(n=899)

**Non-medical topics from pharma companies HCPs engage with on social media the most**

<table>
<thead>
<tr>
<th>#1</th>
<th>Thought leadership content and presentations</th>
</tr>
</thead>
<tbody>
<tr>
<td>#2</td>
<td>Health equity initiatives</td>
</tr>
<tr>
<td>#3</td>
<td>Corporate Social Responsibility programs</td>
</tr>
<tr>
<td>#4</td>
<td>Posts about company culture and values</td>
</tr>
<tr>
<td>#5</td>
<td>Personnel updates</td>
</tr>
</tbody>
</table>

Q4C5. Please rank which medical topics you are most likely to engage with on social media

Q5C5. Please rank which non-medical topics from pharma companies you are most likely to engage with on social media
Educational materials in print / static forms are more preferred. Majority consider video to be very helpful in combination with other types of materials.

Preferred forms of educational materials
(n=899)

- 64% prefer print/static materials
- 36% prefer video
- 20% prefer to combine video with other education materials (n=326)
- 34% prefer to combine video with other education materials (n=537)
Video best practices: How to optimize your impact with HCPs

**Keep it brief**

What is the ideal video length?

**Up to 2 minutes!**

34% of physicians will complete at least 50% of a 2-minute video...this drops off significantly to only 15% when longer than two minutes.

**Break it up**

How many pieces of educational content about a treatment do physicians want to engage with before feeling confident enough to prescribe it?

75% say between 3-6 pieces!

**Be direct and personal**

Anatomy of a “good” HCP campaign

- Visually stimulating
- Brand / corporate equity
- Not overtly promotional
- Content is rooted in data/facts
- Highlight an unmet need
- Leverage the power of peer-to-peer (KOL, DOL)
- Personalization
- Clear call-to-action

Sources: HCP Sentiment Series Part 7, Part 9; Sermo Platform Analytics 2022; Sermo RealTime Study October 2022.
Looking forward to 2023: Prioritize your brand presence on platforms HCPs use and trust

Choosing the right content channels influences physicians' treatment decisions

Physician-only social platforms and peers are growing avenues to influencing treatment decision-making – a signal to leverage more KOLs too!

Move beyond the science to who you are as a company

Thought leadership has been a staple in healthcare go-to-market for years, but health equity is a close second as the world focuses on ensuring equitable care for all. Sharing your equity initiatives on social and other channels is a great way to build trust and preference as a manufacturer.

Keep in mind:

- Sales reps are no longer the top preferred source for medical information among physicians globally
- Video—paired with other education materials—increases support for both physicians and their patients
Implementing impactful patient support through HCPs
About half of the respondents are sharing educational videos with their patients. Those who share usually do so by directing patients to pharma websites; in China sharing via social media is very common.

Percentage of HCPs sharing videos with patients to educate them about their diagnosis

(n=899)

Ways of sharing videos with patients (base: HCPs sharing videos with patients)

Direct them to pharma websites
Sharing via email or a secure patient messaging portal
Sharing via social media
View live together during the appointment

Significantly higher than Global at 95% confidence level
Significantly lower than Global at 95% confidence level
Globally, physicians see patient support programs as somewhat important. In US, importance is skewed higher and in Japan, they are of neutral importance.

Importance of patient support programs to practice and patients

Top 2 Box

Examples of patient support programs:
- Copay savings cards
- Adherence programs

Q3C3. How important are patient support programs to your practice and patients?
Globally, the majority of physicians are conducting their own research vs relying on sales reps to surface information up to them that will support their practice.

**Sources for learning about new/advanced technologies helping patients and practice**

- **Their own online research**: Globally, 65% (n=899), significantly higher than Global at 95% confidence level. In the US and EU5, 73% (n=318) are significantly higher than Global at 95% confidence level.
- **Trusted peers or KOLs**: Globally, 45% (n=899), significantly lower than Global at 95% confidence level. In Japan, top source is sales reps; online research is less relied on.
- **Sales reps**: Globally, 41% (n=899). In China, top source is peers/KOLs and higher reliance on reps/digital.
- **Digital ads or engagement**: Globally, 24% (n=899).

Q5C2. How do you learn about new/advanced technologies that are designed to help your practice and your patients?
Looking forward to 2023: Optimize your website to educate both patients and physicians

Digitally sharing treatment information with patients still lags in popularity to traditional printed materials, but not by much.

Printed materials continue to be a convenient way to educate patients, but there appears to be a large swath of physicians sharing digital education materials—like videos—with patients too.

Producing digital educational content may become the new normal in short order.

Keep in mind:

- Based on new trends, try a balanced approach to traditional and digital educational content.

- Patient support program importance differs by region—the US places the most importance on these programs due to costs being a bigger factor than the rest of the world.
Turn insights into action with Sermo’s holistic solution

Primary insights
- Quant
- Qual

Native physician engagements
- Feed based
- Message based
- Sermo Rounds

Organic insights
- Social intelligence
  Powered by Sermo Conversations
- Drug ratings
Thank you

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