HCP Sentiment Series Part 10

Insights for 2023 on HCP content habits and best practices

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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

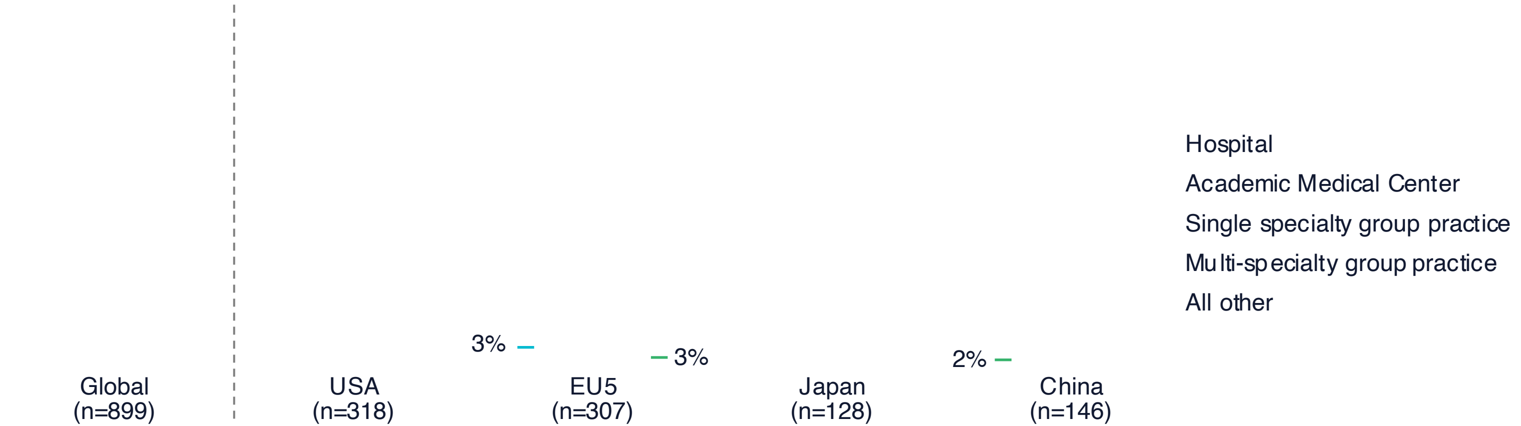
- Questions were solicited from Sermo clients and fielded October 2022
- Sermo invited physicians to participate among a list of 7 specialties across 8 countries
- **Total sample: 899**

Country	Sample
USA	318
China	148
Japan	128
UK	103
Spain	63
Italy	60
Germany	42
France	39

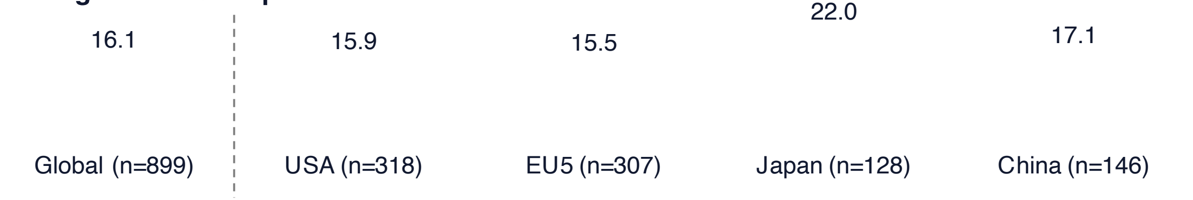
Specialty	Sample
HemOnc	159
Cardiology	157
Gastroenterology	128
Endocrinology	127
Neurology	127
Dermatology	112
Primary Care	89

Sermo’s HCP Sentiment Study 10: Respondent profile

Primary Affiliation



Average Years Of Experience



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

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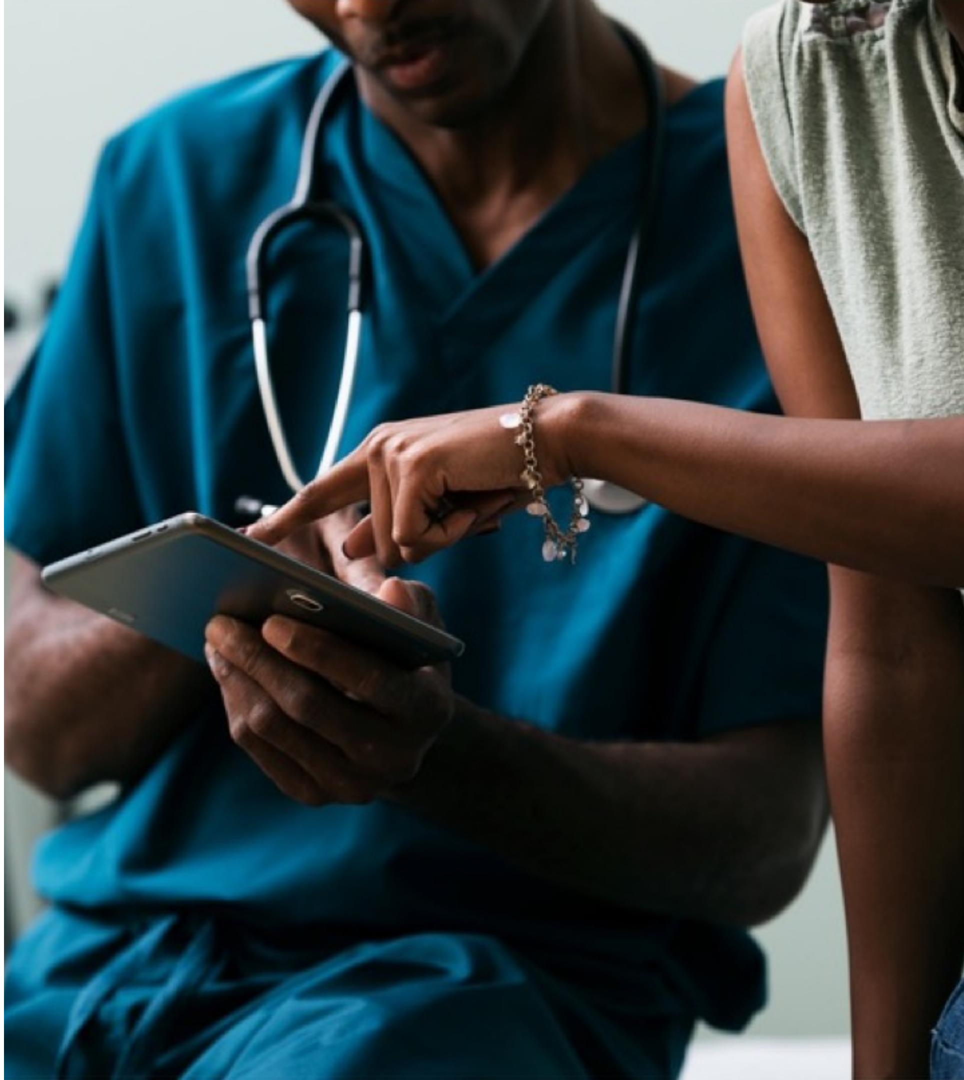
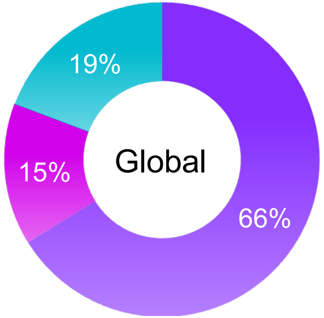


Globally, HCPs view pharma companies as a credible source for disease state information and understanding of the needs of physicians

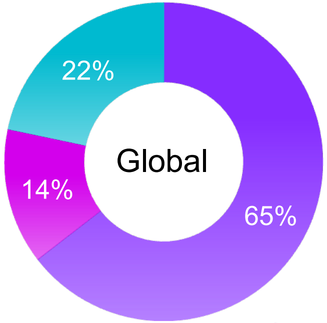
Pharmaceutical industry is a credible source for disease-state information
(% of physicians agreeing/disagreeing with the statement)



(n=899)

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

Pharma companies understand what I and my fellow MDs need from them
(% of physicians agreeing/disagreeing with the statement)



(n=899)

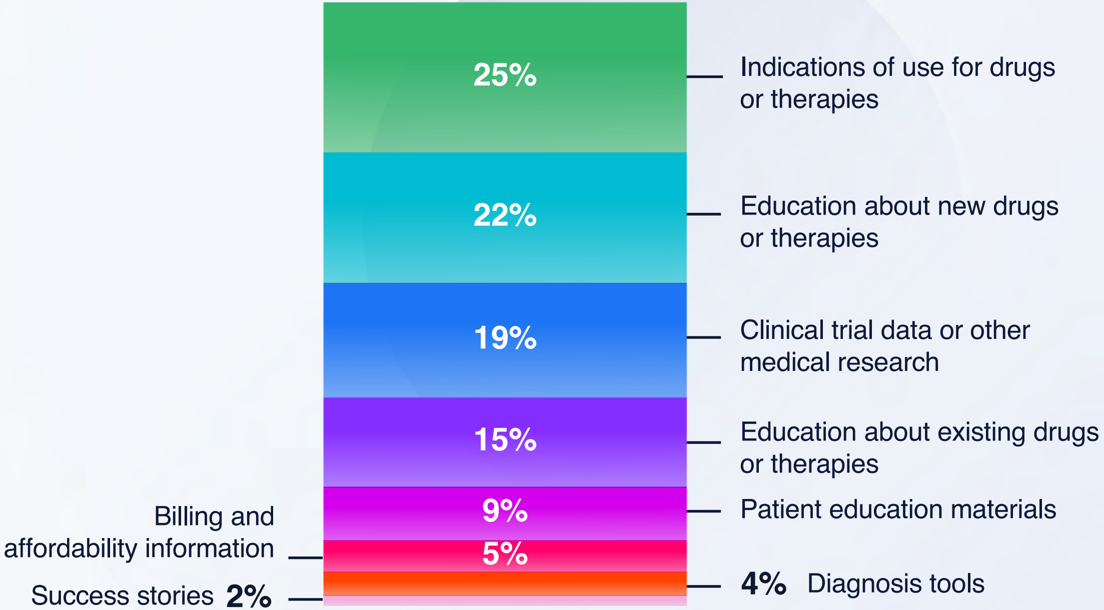
In Japan and China, higher agreement (75% and 76%) with pharma understanding MD needs

- Percentage of physicians that strongly / somewhat agree
- Percentage of physicians that strongly / somewhat disagree
- Percentage of physicians that are neutral

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)

	(n=899)	(n=318)	EU5 (n=307)	(n=128)	(n=146)
Clinical data success stories	**#T-1** (28%)	**#2** (26%)	**#3** (21%)	**#1** (36%)	**#1** (42%)
Presence at medical congresses	**#T-1** (28%)	**#3** (23%)	**#1** (39%)	**#2** (28%)	**#3** (16%)
Diagnosis tools and calculators	**#3** (22%)	**#1** (29%)	**#2** (24%)	**#4** (15%)	**#4** (9%)
Personalized content	**#4** (21%)	**#4** (21%)	**#4** (16%)	**#3** (21%)	**#2** (33%)

In China, higher interest in personalized content

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

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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

Global (n=899)	US (n=318)	EU5 (n=307)	Japan (n=128)	China (n=146)
1. Online scientific publications	**1. Online scientific publications**	**1. Online scientific publications**	**1. Employer**	**1. Online scientific publications**
2. Conferences/ events	2. Conferences/ events	2. Conferences/ events	2. Pharma reps	2. International & regional KOLs
3. Employer	3. Personalized emails from healthcare brands	3. Employer	3. Conferences/ events	3. Medical organizations

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

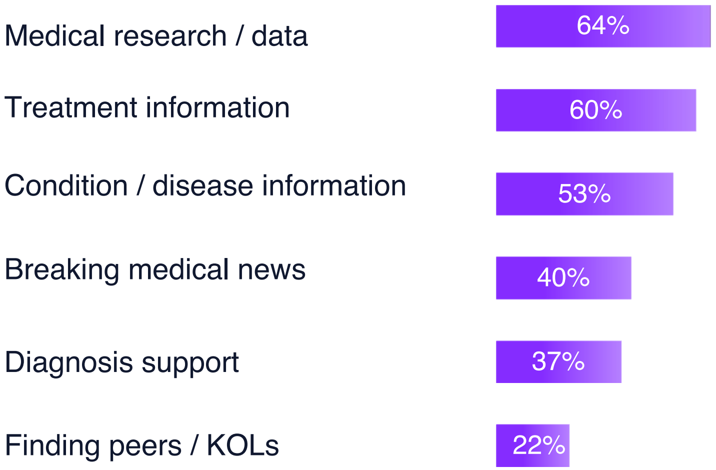
In China, a top source is KOLs, underscoring importance of this channel in China for new info

Q4C2. What is your most preferred source for medical information?

Medical research / data is among the most searched topics across all markets

Globally, most searched health-related topics using online search engines

(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

Content channels influencing treatment decisions

	(n=899)	(n=318)	EU5 (n=307)	(n=128)	(n=146)
Events & congresses	63%	53% ▼	71% ▲	45% ▼	84% ▲
Physician-only medical platforms	46%	49%	45%	32% ▼	57% ▲
Peers	45%	51% ▲	35% ▼	27% ▼	67% ▲
Pharma brand websites	20%	18%	19%	19%	27% ▲
Direct sales outreach	18%	22% ▲	19%	5% ▼	20%
General social media	13%	8%	14%	13%	21% ▲
Email marketing	12%	9%	12%	23% ▲	11%
None	6%	7%	4%	6%	5%

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

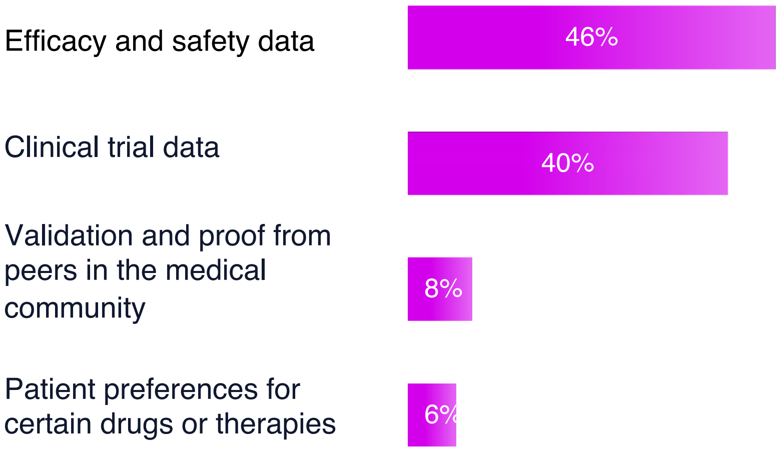
▲ Significantly higher than Global at 95% confidence level
▼ Significantly lower than Global at 95% confidence level

Q2C2. Which content channels are most likely to influence your treatment decisions?

Globally, efficacy and safety, and clinical trial data are the primary information types that drive treatment decision-making

Most important information to HCPs regarding a new treatment decision (% ranking each option as #1)

(n=899)



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

#1 New research focus and data

#2 Specialty-specific healthcare education and updates

#3 Patient success stories

(n=899)

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

#1 Thought leadership content and presentations

#2 Health equity initiatives

#3 Corporate Social Responsibility programs

#4 Posts about company culture and values

#5 Personnel updates

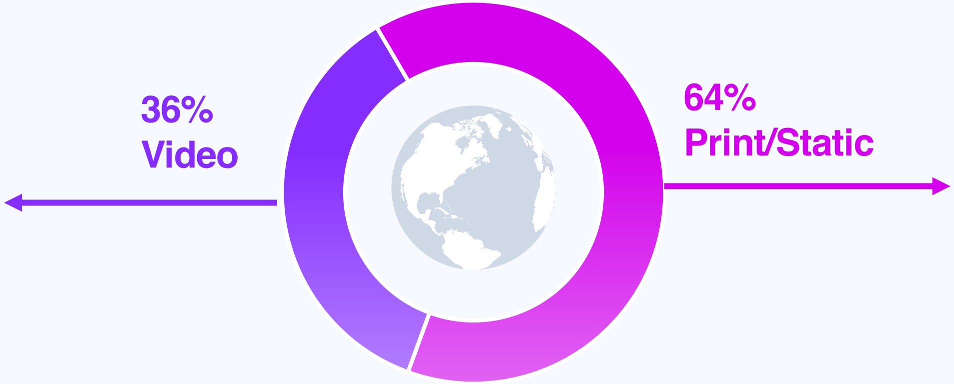
Q4C5. Please rank which medical topics you are most likely to engage with on social media
Q5C5. Please rank which non-medical topics from pharma companies you are most likely to engage with on social media

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)

20% of these physicians prefer to combine video with other education materials

n=326



34% of these physicians prefer to combine video with other education materials

n=537

Q1C4. Which of the following forms of educational materials do you prefer?
Q2C4. How do you feel about video as an educational resource?

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

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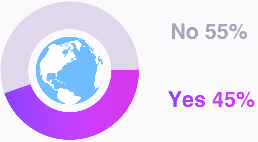
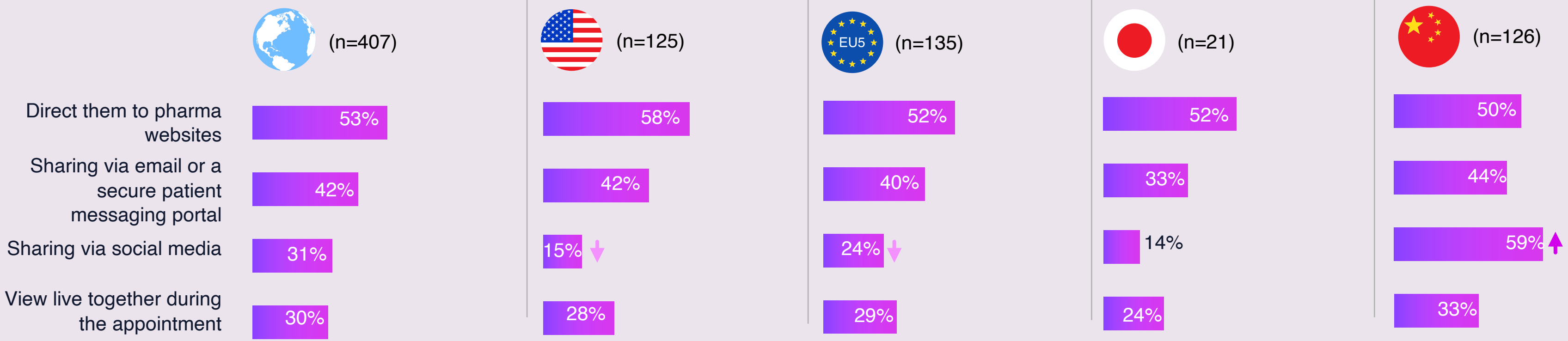
About half of the respondents are sharing educational videos with their patients. Those who share usually do so by directing patients to pharma websites; in China sharing via social media is very common

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)

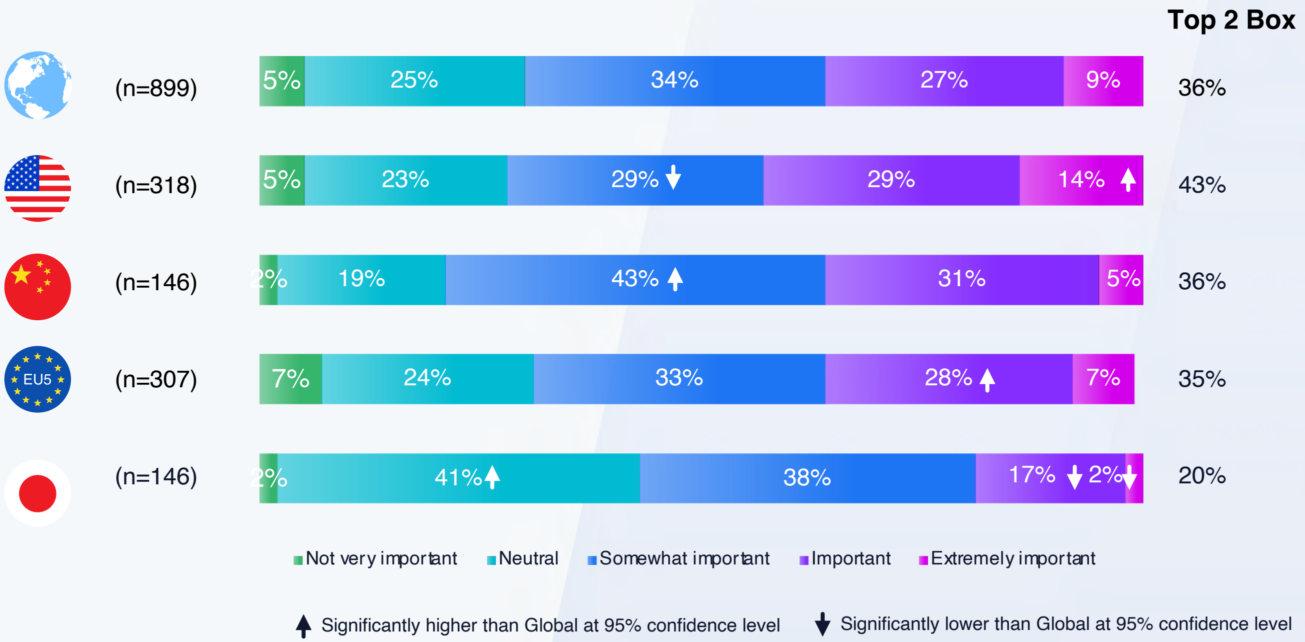


Significantly higher than Global at 95% confidence level
Significantly lower than Global at 95% confidence level

Q3C4. Do you share videos with patients to educate them about their diagnosis?
Q4C4. How do you share videos with patients to educate them about their diagnosis?

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



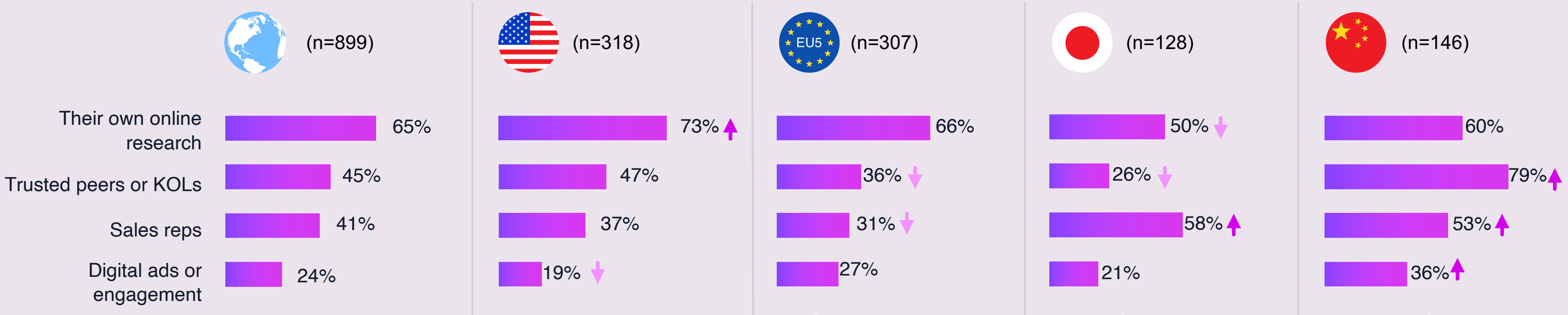
Examples of patient support programs:

- 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



Significantly higher than Global at 95% confidence level

Significantly lower than Global at 95% confidence level

In the US and EU5, HCPs' own online research is the main source

In Japan, top source is sales reps; online research is less relied on

In China, top source is peers / KOLs and higher reliance on reps/digital

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

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Quant

Qual

Organic insights

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