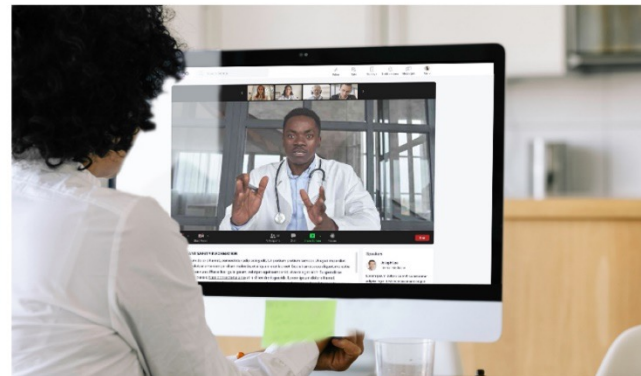
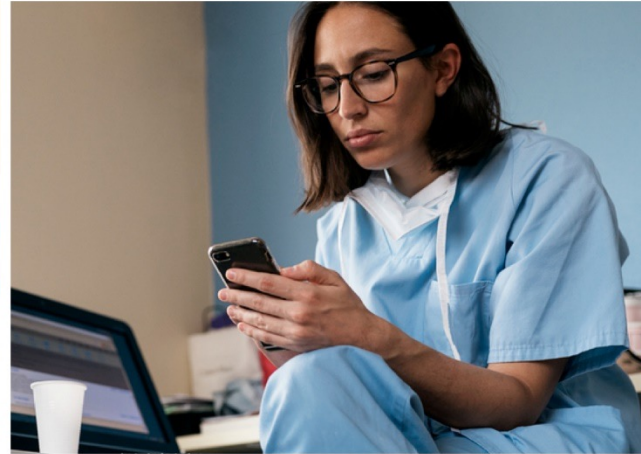
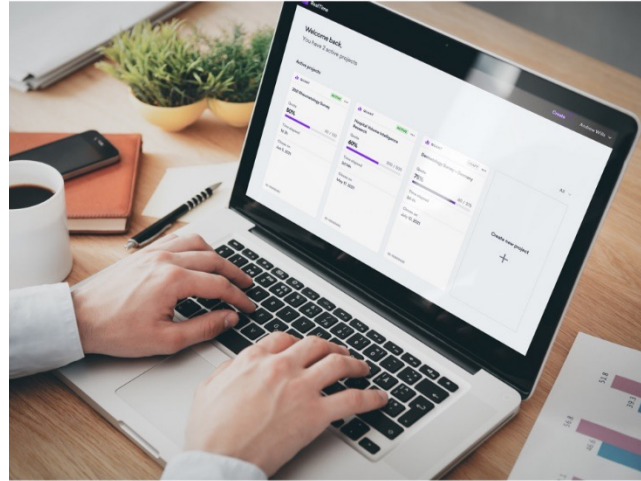
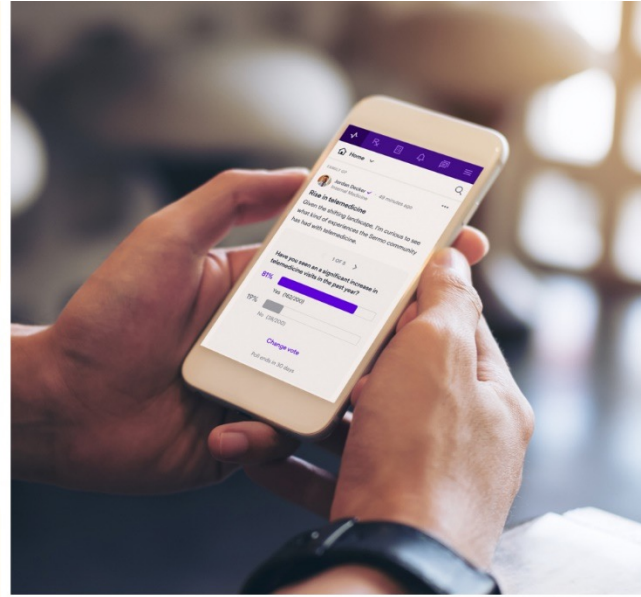


HCP SENTIMENT STUDY PART 13

# How to: Optimize your HCP social media strategy leveraging new research powered by Sermo

**sermo**  LiveWorld

Presented at Digital Pharma East September 2023



# Report Objectives



## The Platforms

Align with HCPs by understanding the social channels and times they use social for professional & personal reasons



## The Content

Discover what resonates with HCPs and the growing importance of KOLs



## The Strategy

Putting it all together – learn how to best connect with HCPs across your various tactics

# Research sample overview

Sermo and Liveworld invited physicians to participate among a list of 9 specialties and 7 countries. The survey fielded in July-August 2023, and the total survey sample is 399 physicians.

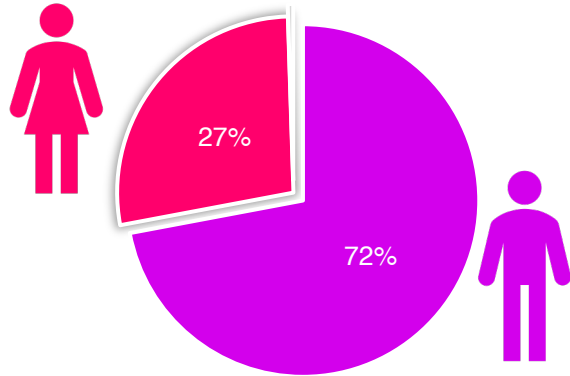
We also conducted a re-contact survey post Twitter re-brand to ask about X, Facebook and LinkedIn – that sample size for that survey is 242.

COUNTRY	SAMPLE
United States	66
Canada	64
France	54
Italy	54
Spain	54
United Kingdom	54
Germany	54
<b>Total</b>	<b>399</b>

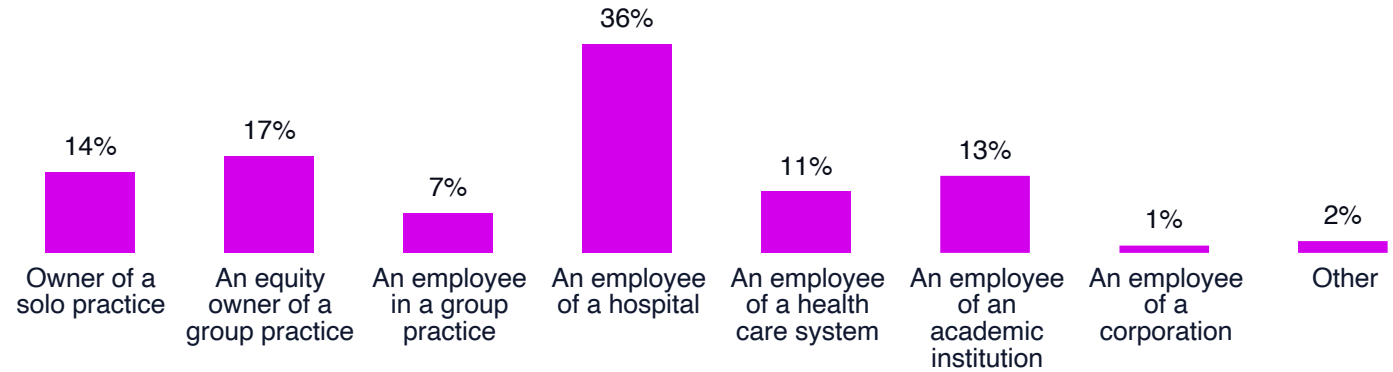
SPECIALTY	SAMPLE
PCP	221
Ophthalmology	47
Neurology	46
Cardiology	46
Pulmonology/Respiratory Medicine	45
Dermatology	45
Endocrinology	41
Allergy & Immunology	38
Infectious Diseases	34
<b>Total</b>	<b>399</b>

# Research sample overview

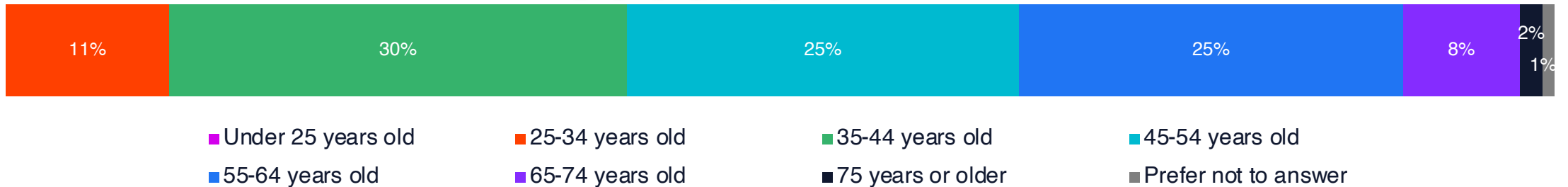
## Gender



## Practice Setting



## Age



Base: Total respondents Overall (n=399)

Q1: What is your age? Q2: What is your gender? Q3: What type of practice setting do you work in?

# The Platforms:

when & where physicians are  
socially engaging

# Half of physicians are leveraging social during work hours for professional reasons; most personal usage is happening after work (67% of physicians globally)

Frequency of Social Media Usage



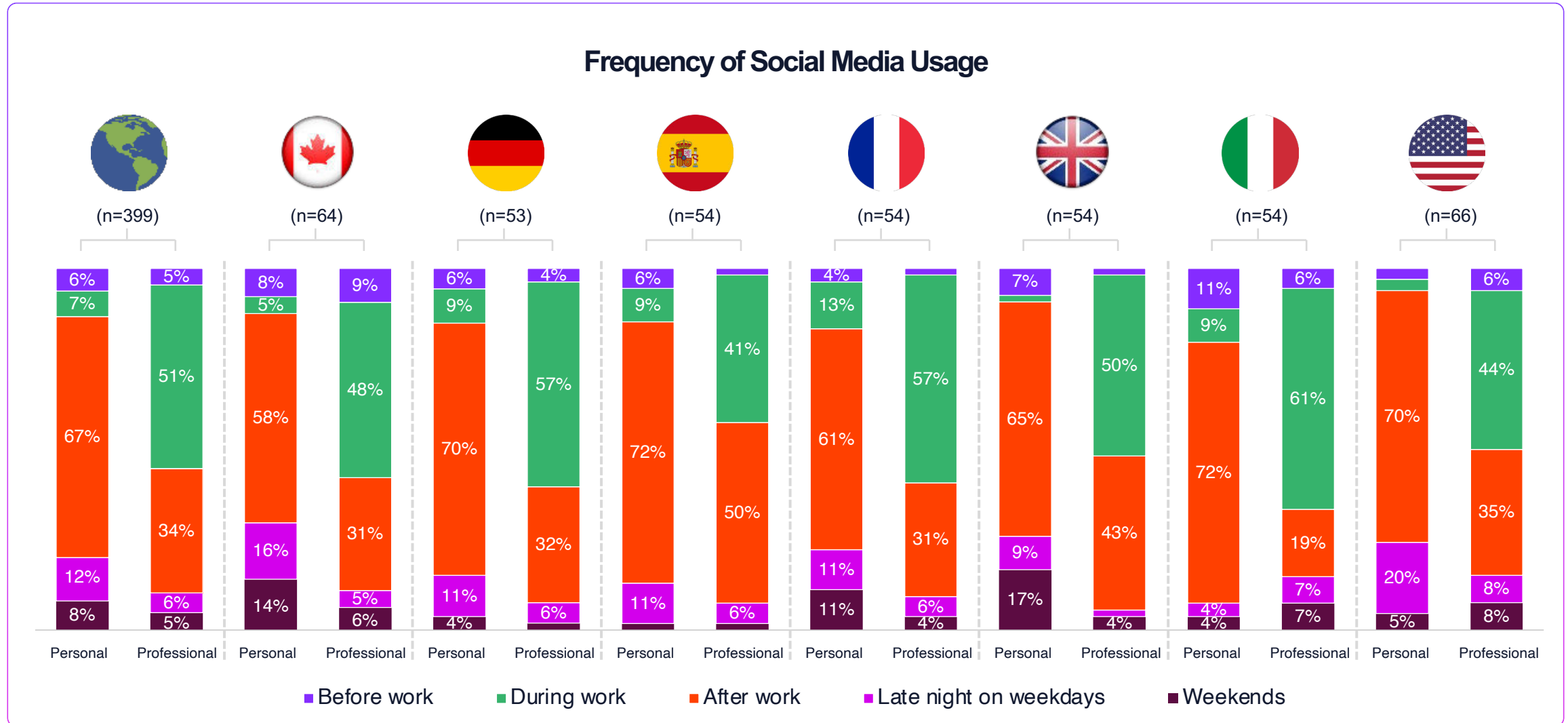
(n=399)



Data Labels <4% not shown

Q4. When do you access social media most frequently for personal reasons?  
Q5. When do you access social media most frequently for professional reasons?

# Frequency of social media usage by country



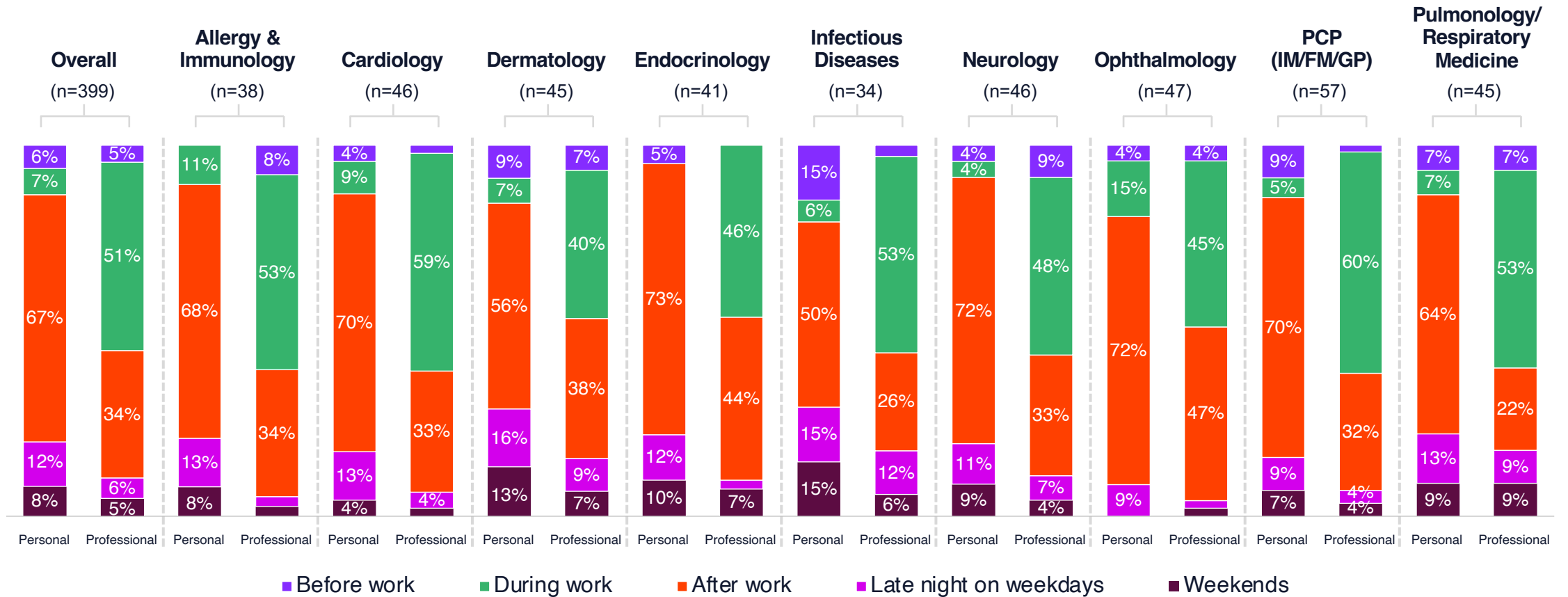
Data Labels <4% not shown

Q4. When do you access social media most frequently for personal reasons?

Q5. When do you access social media most frequently for professional reasons?

# Frequency of social media usage by specialty

## Frequency of Social Media Usage



Data Labels <4% not shown

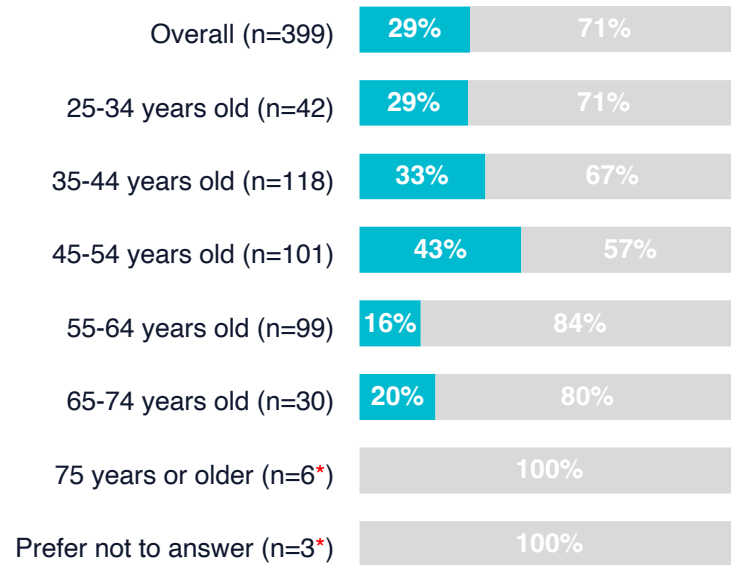
Q4. When do you access social media most frequently for personal reasons?

Q5. When do you access social media most frequently for professional reasons?

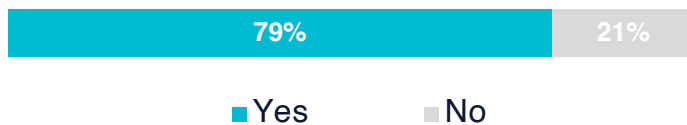


# About 1/3 of physicians are professionally active on X (formerly Twitter)

## Use of Twitter (pre-rebrand to X)

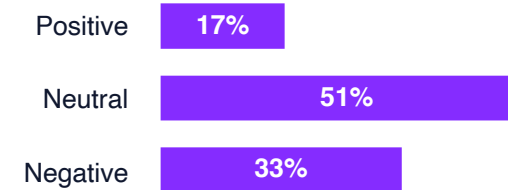


## Continued Professional Importance

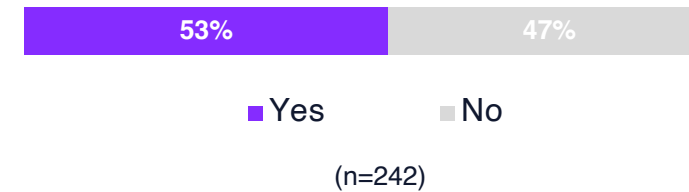


Note: survey closed three days prior to X rebrand announcement on July 23

## ~1 Month Post Rebrand: Sentiment Towards X



## Continued Professional Importance



Note: post-rebrand survey launches on August 17<sup>th</sup>, almost 1 month post-rebrand announcement

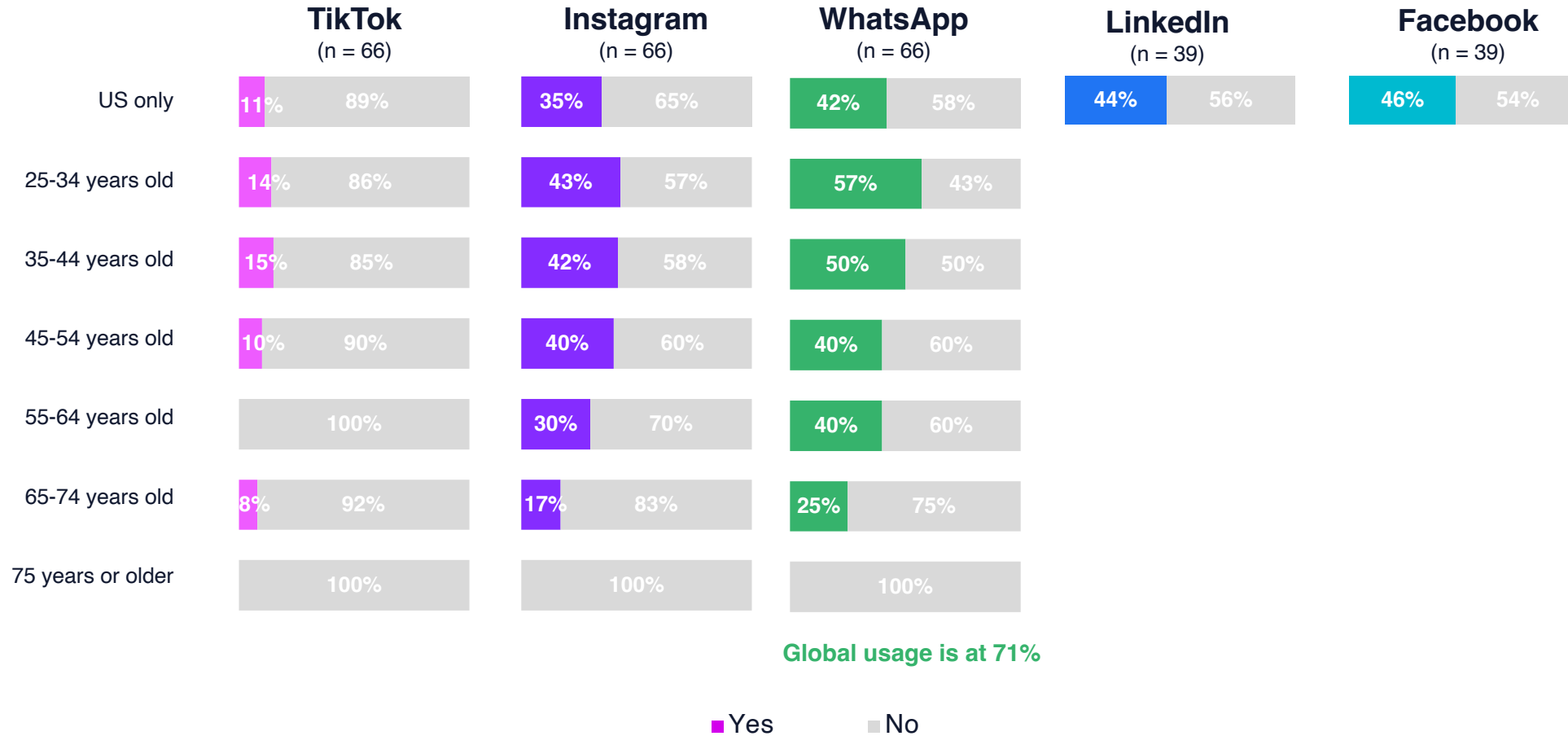
As of September 10: Positive 33%; Neutral 39%;  
72% think it will continue to be an important professional channel\*

Q10. Are you professionally active on Twitter (logged in within the past 30 days)? IF Q10 = YES] Q10a. If Yes: Do you think Twitter will continue to be an important professional channel given the recent changes at the company? Q19: Generally, how do you feel about the rebrand of Twitter to X? Q20: Do you think X will continue to be an important professional channel given the recent rebranding and changes at the company?

\*Source: Sermo Realtime Survey September 10, N=123 US and EU5 Cardiologists, Endocrinologists, PCPs and OB/GYNs

# In the US, social media usage is highest among lower age brackets

## Use of Social Media Platforms Among Various Age Groups (US Only)



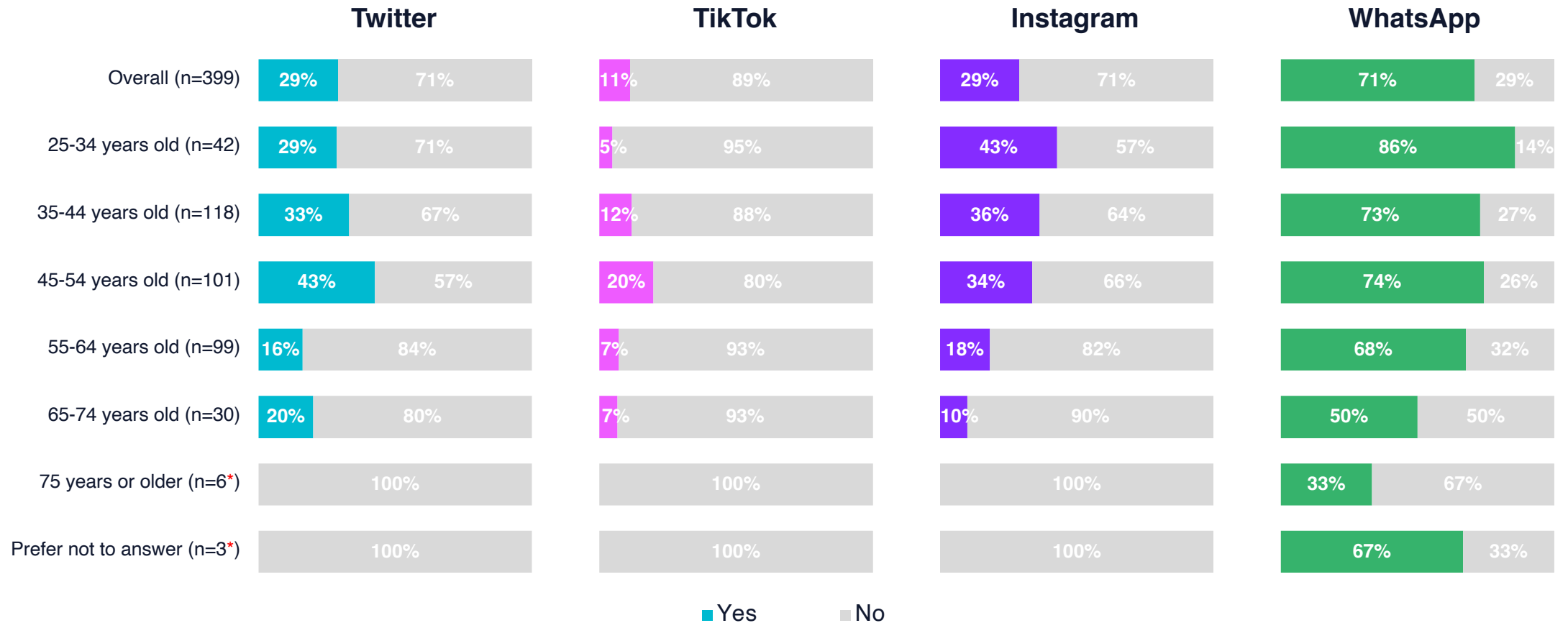
Legend follows TikTok, rest follows the order; caution low sample sizes for age breakouts

Q10/11/13/21/22. Are you professionally active on Twitter/TikTok/Instagram/Facebook/LinkedIn (logged in within the past 30 days)?

Q14. Do you use WhatsApp to communicate with your HCP peers about medical topics?

# Globally, usage is high among the 55–64-year-old group; WhatsApp is “universally” adopted

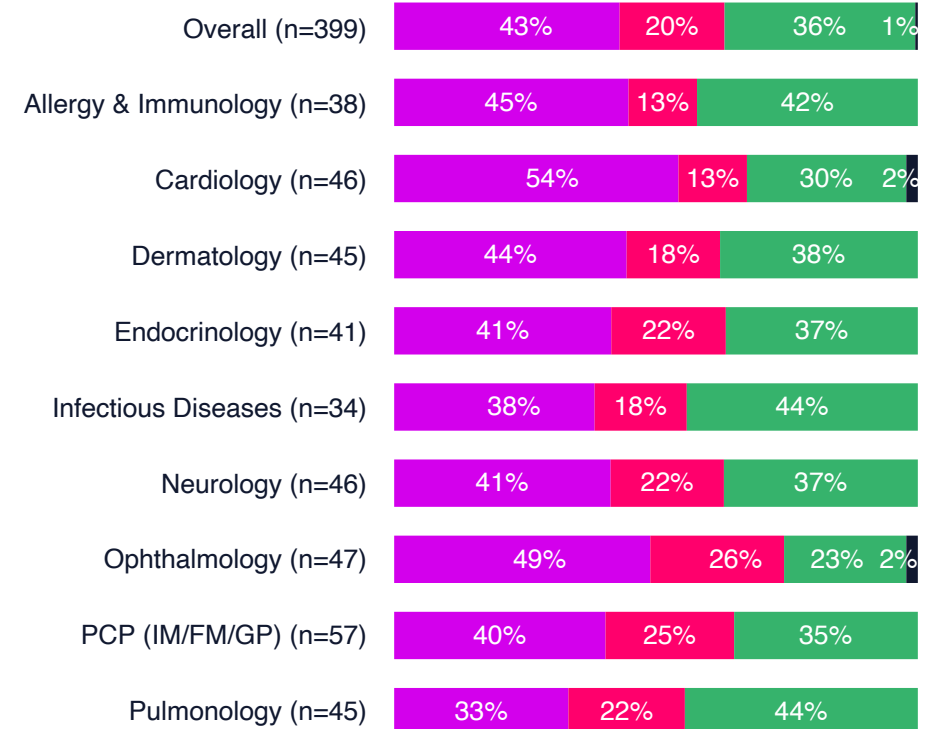
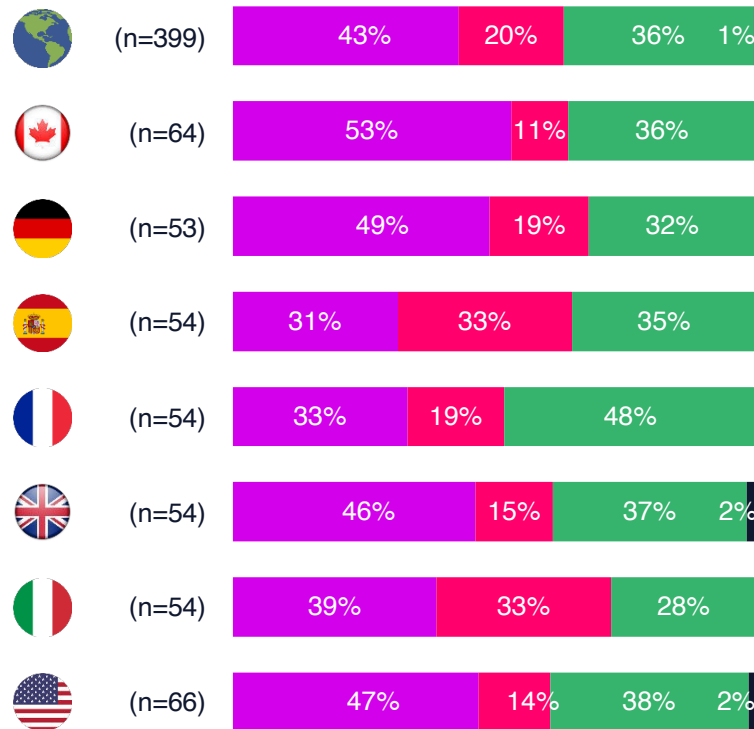
## Use of Social Media Platforms Among Various Age Groups (Global)



\*Caution low base size  
 Q10. Are you professionally active on Twitter (logged in within the past 30 days)? Q11. Are you professionally active on TikTok (logged in within the past 30 days)?  
 Q13. Are you professionally active on Instagram? (logged in within the past 30 days) Q14. Do you use WhatsApp to communicate with your HCP peers about medical topics?

# The intersection of social and peer-to-peer: 43% say any digital channel where they connect with other MDs is peer-to-peer; 36% say any physician only platform

## Definition of Digital “Peer-to-Peer” within Medical Community



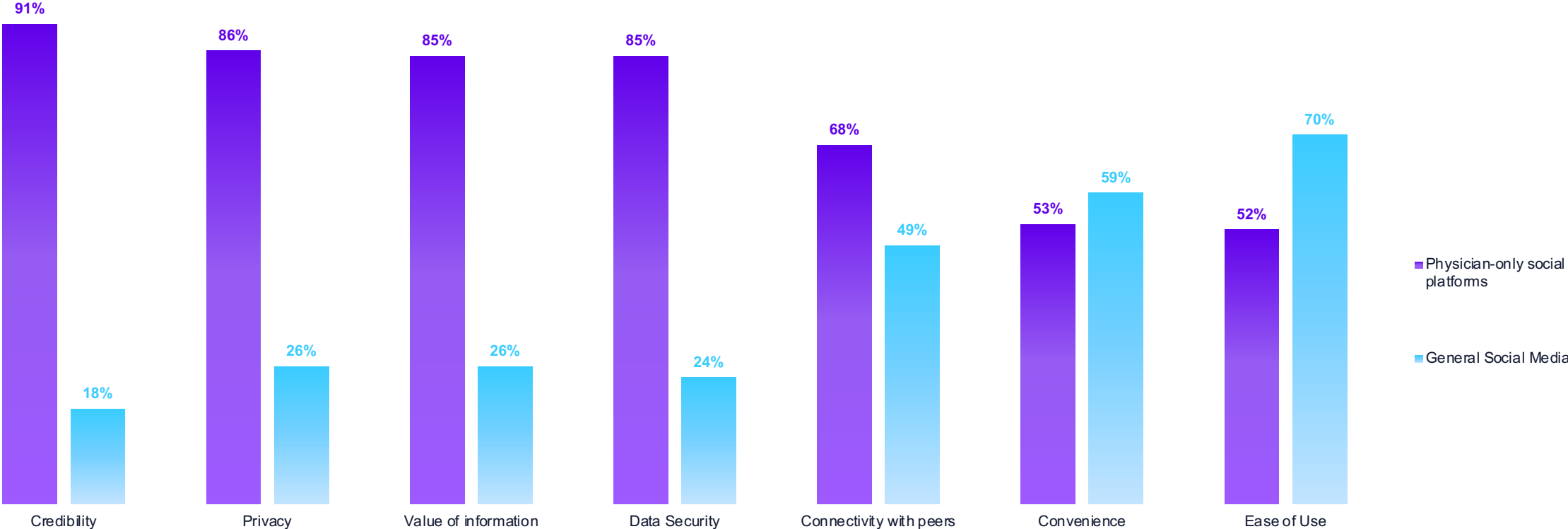
■ Any digital channel
 ■ Any social media channel
 ■ Any physician-only platform/group
 ■ Other

Q17. How would you define digital “peer-to-peer” within the medical community?

PROPRIETARY & CONFIDENTIAL

# HCPs find physician-only social platforms to have *more valuable* information, and to be more *credible, secure and private*

## Platform type that enables benefits and / or features more



## To drive behavior-change and improve patient outcomes, innovative brands are tapping into the power of social

62%

of physicians frequently or occasionally **change their perception of a medication or treatment** based on content they've seen on social media

50%

of physicians frequently or occasionally **change their prescribing choices** based on content they've seen on social

Source: Live World Social Media Usage Study. February 2023. n=420 Physicians Worldwide

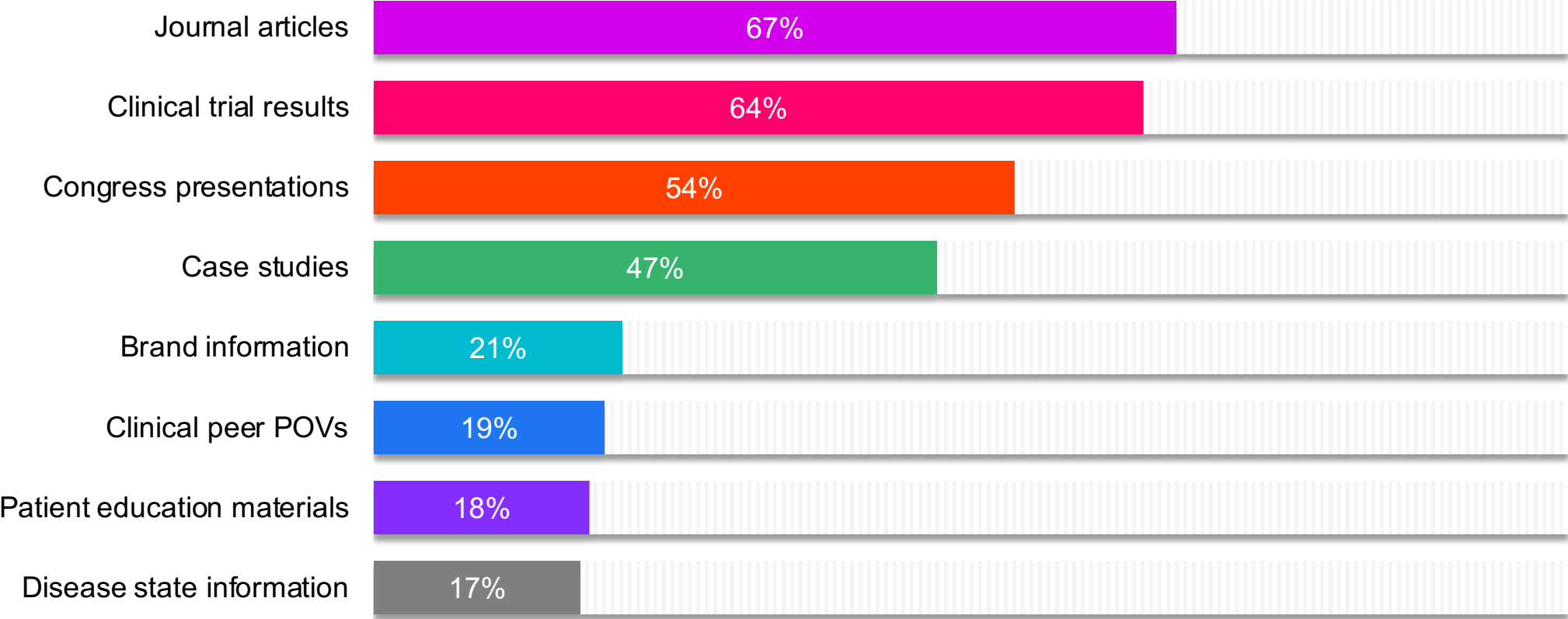


# The Content:

Discover what resonates with HCPs  
& the growing importance of KOLs

# Data-forward content is at the top of the list with journal articles, clinical trial results and congress presentations taking the top spots

Professional Medical Content Capturing Attention on Social Media



Base: Total respondents Overall (n=399)  
Q9: What types of professional medical content captures your attention on social media?



# PCPs are more likely to look to patient education materials and disease state information

## Professional Medical Content Capturing Attention on Social Media

	Overall	Allergy & Immunology	Cardiology	Dermatology	Endocrinology	Infectious Diseases	Neurology	Ophthalmology	PCP (IM/FM/GP)	Pulmonology/ Respiratory Medicine
	n=399	n=38	n=46	n=45	n=41	n=34	n=46	n=47	n=57	n=45
Journal articles	67%	68%	74%	69%	80%	76%	65%	47% ▼	61%	69%
Clinical trial results	64%	63%	76%	58%	68%	76%	61%	57%	54%	71%
Congress presentations	54%	47%	63%	51%	66%	59%	67% ▲	36% ▼	40% ▼	58%
Case studies	47%	47%	39%	60%	41%	47%	43%	57%	47%	40%
Brand information	21%	16%	13%	29%	17%	24%	20%	30%	30%	7% ▼
Clinical peer POVs	19%	8%	13%	29%	17%	15%	22%	26%	28%	11%
Patient education materials	18%	13%	11%	24%	17%	24%	22%	9%	33% ▲	7% ▼
Disease state information	17%	18%	15%	18%	24%	24%	13%	13%	28% ▲	2% ▼

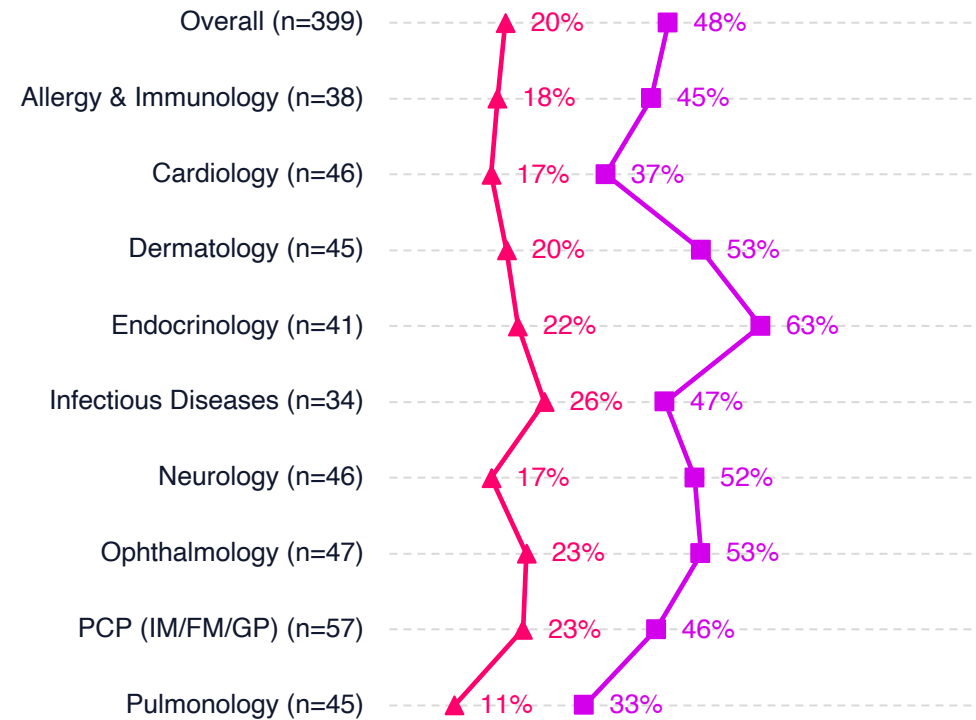
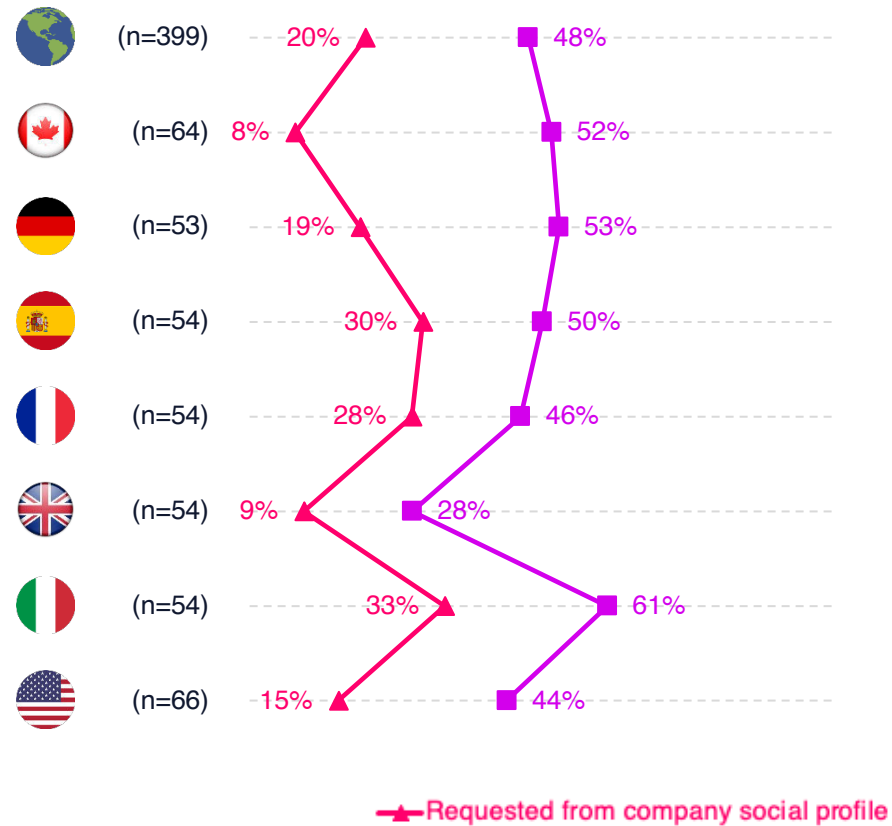
▲ Significantly higher than Global at 95% confidence level  
▼ Significantly lower than Global at 95% confidence level

Q9. What types of professional medical content captures your attention on social media?

PROPRIETARY & CONFIDENTIAL

# Pharma social profiles may be rising in popularity as a channel for requesting information; web inquiries are strong from physicians in Italy, Spain & Canada

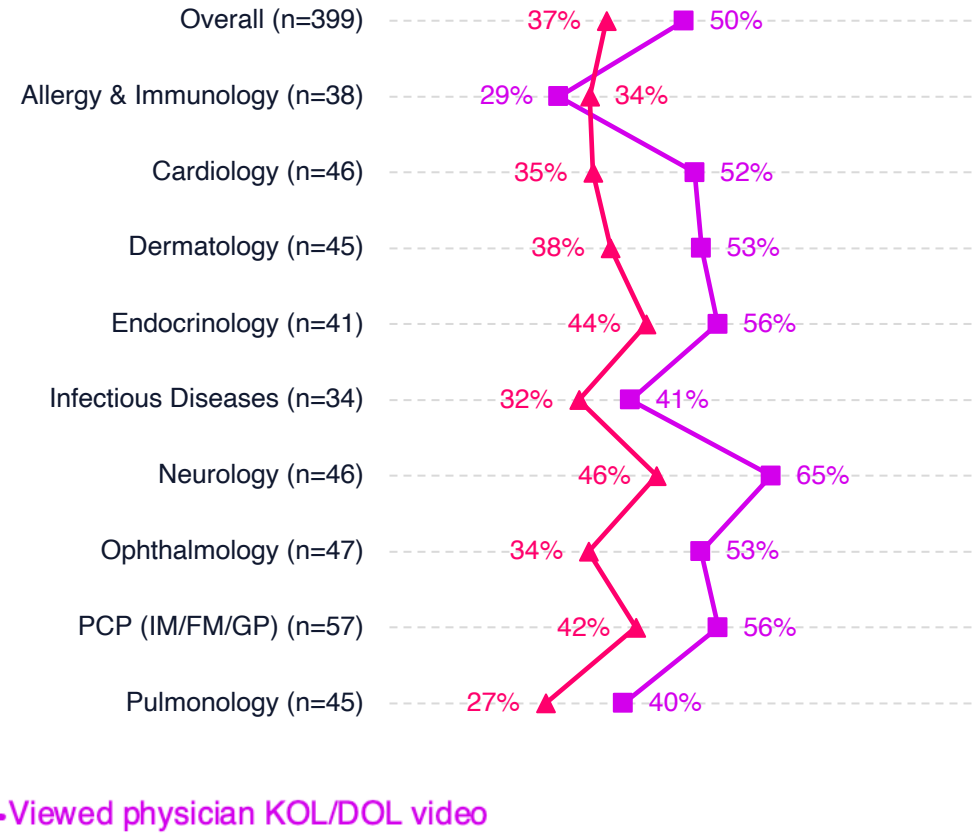
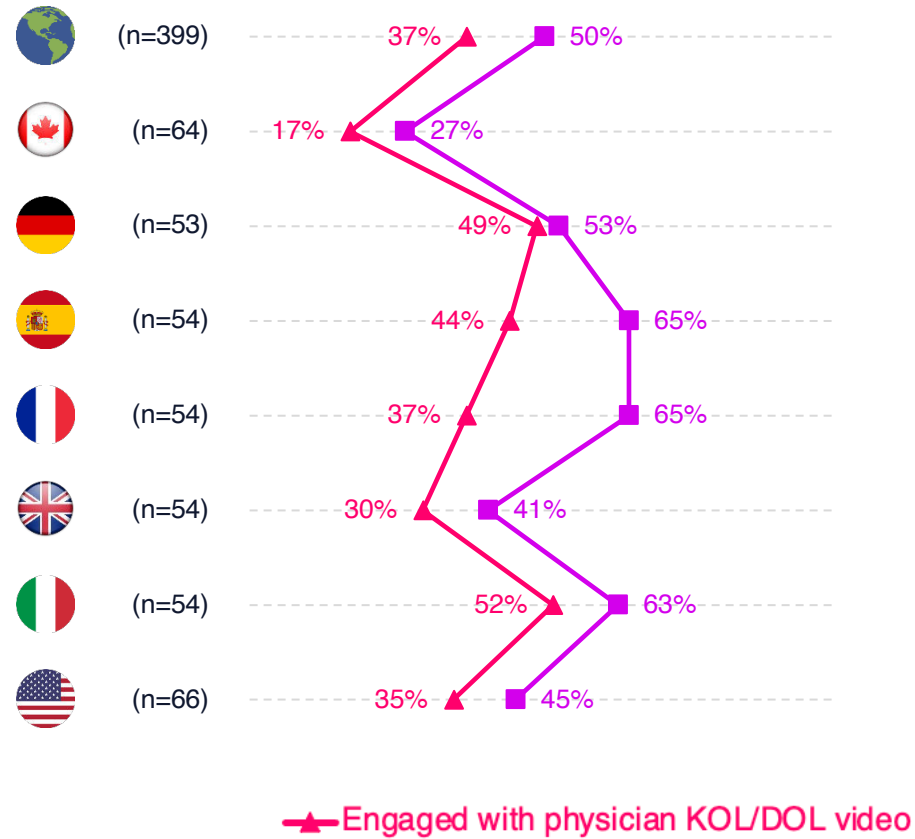
## Channel for Requesting from Pharmaceutical Company (Yes; Within 30 days)



Q15. Have you requested something from a pharmaceutical company website within the last 30 days?  
 Q16. Have you requested something from a pharma company social profile in the last 30 days?

# Area of opportunity: drive more engagement with KOL/DOL content

## Viewed/engaged with KOL or DOL in Last 30 Days (Yes)



Q6. Have you viewed a Physician Key Opinion Leader or Digital Opinion Leader video on social in the last 30 days?  
 Q7. Have you engaged with a physician KOL or DOL video on social in the last 30 days? (liked, commented, shared, etc.)

## We observe slight differences among specialty preferences; Dermatologists are significantly more likely to be interested in branded content from KOLs

Type of Content from KOLs Resonating with You

	Overall	Allergy & Immunology	Cardiology	Dermatology	Endocrinology	Infectious Diseases	Neurology	Ophthalmology	PCP (IM/FM/GP)	Pulmonology/ Respiratory Medicine
	n=399	n=38	n=46	n=45	n=41	n=34	n=46	n=47	n=57	n=45
Articles/blog posts	56%	53%	67%	47%	54%	56%	63%	55%	56%	53%
Videos	52%	39%	54%	49%	51%	44%	61%	68% ▲	56%	36% ▼
Conference recaps	46%	39%	50%	56%	61% ▲	59%	46%	32% ▼	35%	40%
Podcasts	37%	32%	37%	40%	37%	44%	48%	23% ▼	42%	29%
Disease state education	26%	34%	17%	22%	22%	41% ▲	33%	21%	28%	22%
Brand education	14%	13%	9%	31% ▲	12%	18%	15%	6%	12%	11%
Other	3%	0%	2%	4%	2%	3%	4%	4%	4%	4%

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

Q8. What type of content from KOLs on social media is resonating with you?

# The Strategy:

Learn how to best connect with HCPs across your various tactics

# Physicians rank: how they'd like to receive information about a new treatment option

Data-forward content ranks  
highest on physicians' priority list

Top three choices are consistent  
across countries and specialties

1 Clinical trial results

2 Journal articles

3 Congress presentations

4 Case studies

5 Clinical peer POVs

Branded and DSE  
content comes next

6 Brand information

7 Patient education materials

8 Disease state information (DSE)

Physicians are more ambivalent  
towards many of the traditional  
offerings from pharma

9 Ability to request samples

10 Ability to connect with a sales rep

Q18. Imagine there is a new treatment option just approved for your patients. Please rank the order in which you would like to receive the following professional medical information from a pharmaceutical company.

# Executive summary



## The Platforms

There's an emerging, universal sensibility regarding the professional use of social media.

Peer-to-peer takes shape in many forms; the safety and exclusivity of these platforms drive preference.



## The Content

MDs expect, favor, and respond to journal articles, KOL opinion pieces, KOL videos, conference/congress recaps, case studies, and clinical trial data.

Content priorities and expectations are generally consistent across specialties and geographies.



## The Strategy

We should be approaching engagement strategy and content with a physician-first vs. brand-first standpoint.

Prioritize KOLs, as well as clinical trial results, journal articles and congress presentations.

# Thank you!

To learn more, please email  
Sermo at [business@sermo.com](mailto:business@sermo.com)  
or LiveWorld at  
[hello@liveworld.com](mailto:hello@liveworld.com)

