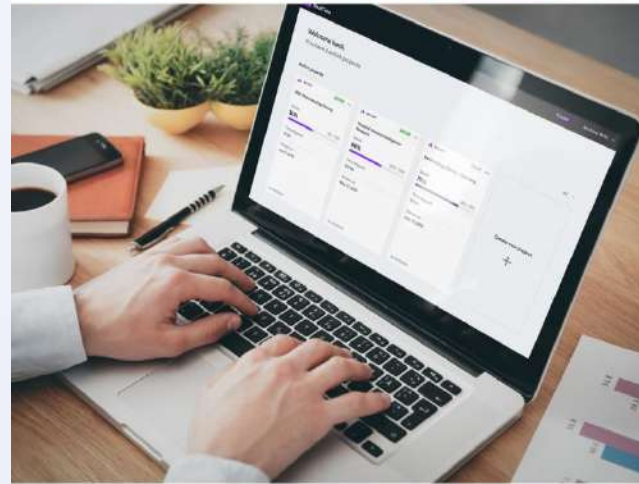
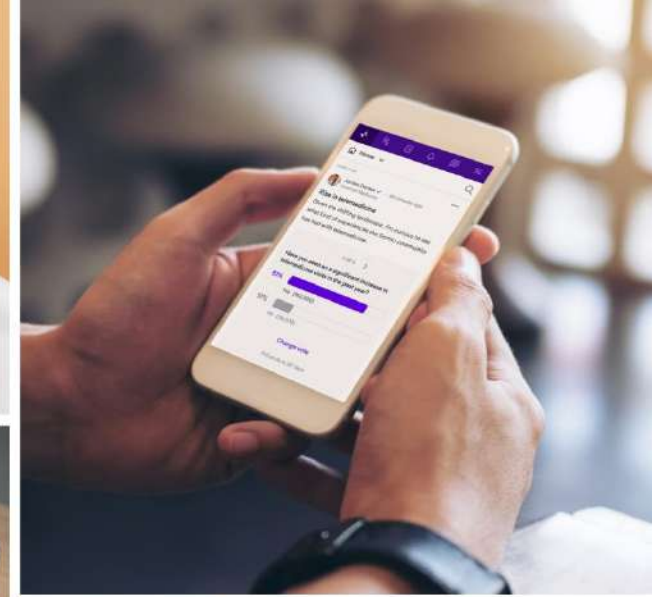


HCP SENTIMENT PART 19

Physician Influence on Consumer Health Purchasing: OTCs, Wearables & Baby Products

Published April 2026

sermo



Executive Summary:

Physician Influence on Consumer Health Purchasing



Key Findings

- HCP recommendations drive real purchases; nearly all physicians recall patients buying products because of their advice.
- Patient demand is rising, increasing pressure on HCPs to guide choices.
- Clear, science-backed information is critical—HCPs want stronger evidence to advise confidently amid competing online influences.

Strategic Implications

- 1. Treat HCPs as demand accelerators, not just endorsers**
 - Physicians are not peripheral influencers; they actively trigger consumer purchases.
 - Marketing should position HCPs as a core conversion lever, especially in categories where clinical reassurance matters.
- 2. Segment messaging by market maturity**
 - EU (Italy/Spain): Lean into activation—equip already-engaged HCPs with sharper claims and proof points.
 - U.S./Canada: Focus on role validation—reinforce why HCP guidance matters and how it differentiates patients from less credible sources.
- 3. Lead with evidence**
 - Scientific backing, clinical rationale, and clarity of claims are critical
 - Brand storytelling should be anchored in data, with marketing assets designed to support patient conversations.

Executive Summary: OTCs



Key Findings

- OTC co-recommendation is the norm: The vast majority of HCPs recommend OTCs frequently or occasionally alongside prescriptions across all markets.
- Vitamins/supplements, pain relief, and allergy are the most commonly recommended OTC categories globally.
- Promotional exposure is uneven: HCPs in Germany, Italy, and Spain receive OTC education/promotions most often; North America sees less frequent exposure.
 - Despite lower exposure in some markets, OTC recommendation behavior remains high, indicating intrinsic clinical relevance.

Strategic Implications

- 1. Marketing should focus on shaping choice amongst HCPs**
 - Since most HCPs already recommend OTCs alongside prescriptions across all markets, marketing need not convince HCPs to recommend OTCs, but to influence which OTC they choose and why.
- 2. Position OTC products as complementary, not standalone consumer goods**
 - Vitamins/supplements, pain relief, and allergy products dominate recommendations, signaling these categories are already integrated into clinical thinking.
 - Frame OTCs as care-continuity tools that support treatment plans, symptom management, or adherence.

Executive Summary:

Wearables



Key Findings

- Wearable data is already in clinical use: half of HCPs incorporate patient-generated data (wearables, CGMs, apps) often or very often.
- Clinical-grade use cases matter most: Wearables with clinical-grade sensors, AI early-warning systems, and remote patient monitoring are seen as having the greatest near-term impact.
- HCPs value multiple data types, especially blood pressure, glucose, heart rate/HRV, activity, and sleep, with preferences varying by market.
- Lifestyle-adjacent features (e.g., personalized nutrition) are lower priority overall, particularly in North America.

Strategic Implications

- 1. Position wearables as clinical tools, in addition to consumer gadgets**
 - Market validated medical use cases (monitoring, early detection, decision support), in addition to wellness or lifestyle framing.
- 2. Segment messaging by adoption maturity**
 - High-use markets (e.g., Spain): Emphasize advanced capabilities, integration, and outcomes.
 - Lower-use markets (U.S./Canada): Focus on proof, workflow fit, and practical clinical value to overcome skepticism.
- 3. Design for workflow integration**
 - Adoption depends on how easily data fits into existing clinical routines; marketing should reinforce simplicity, reliability, and interoperability.

Executive Summary:

Baby Products



Key Findings

- HCPs actively recommend baby products, especially skincare, OTCs, supplements, and feeding/formula products; diapers and wellness devices are less commonly recommended.
- Safety is the primary decision driver: clear pediatric safety data and clinical study summaries matter far more than samples, trials, or promotional tools.
- HCPs want brand information directly, and over 70% are interested in receiving baby/child product updates.
- Physicians believe their recommendations strongly influence parents' purchasing decisions, reinforcing their gatekeeper role.

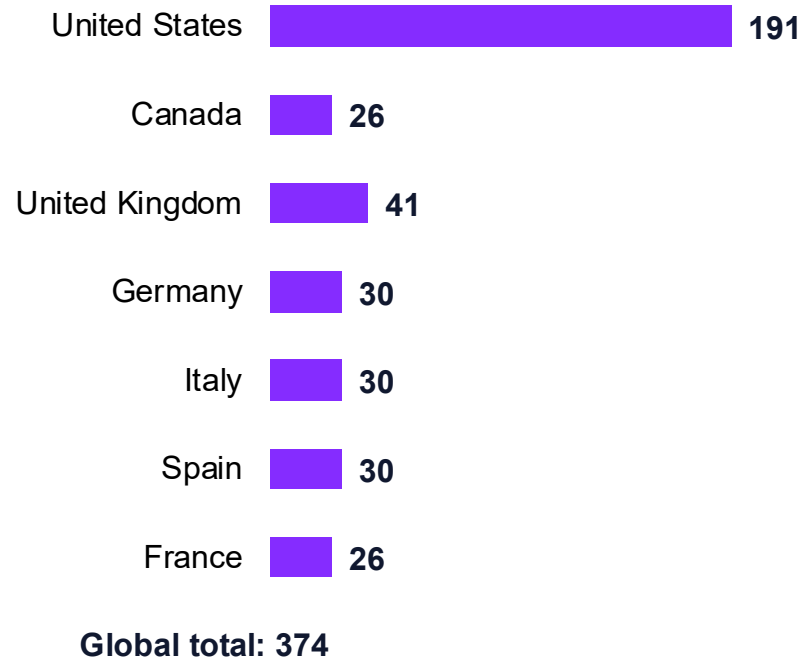
Strategic Implications

- 1. Lead with safety and evidence, always**
 - Baby product marketing must start with pediatric safety data and clinical validation; anything that feels promotional before credible will undermine trust.
- 2. Position baby products as clinical guidance, not consumer choice**
 - HCPs act as risk mitigators for parents. Brands should support that role with reassurance, clarity, and defensible recommendations.
- 3. Focus investment on high-relevance categories**
 - Skincare, OTCs, supplements, and feeding products deserve disproportionate attention; lower-interest categories (e.g., diapers) should not lead strategy.

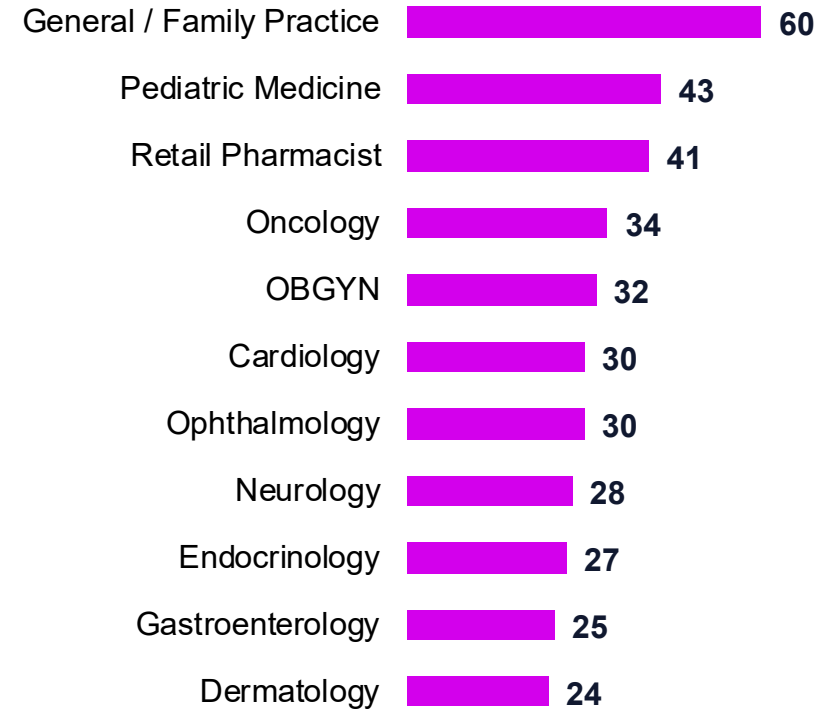
Research sample overview

Report insights are fueled by Sermo's proprietary RealTime technology, used to survey n=374 Physicians in Europe and North America to participate in a 10-minute quantitative online survey

Country Sample Size (n)

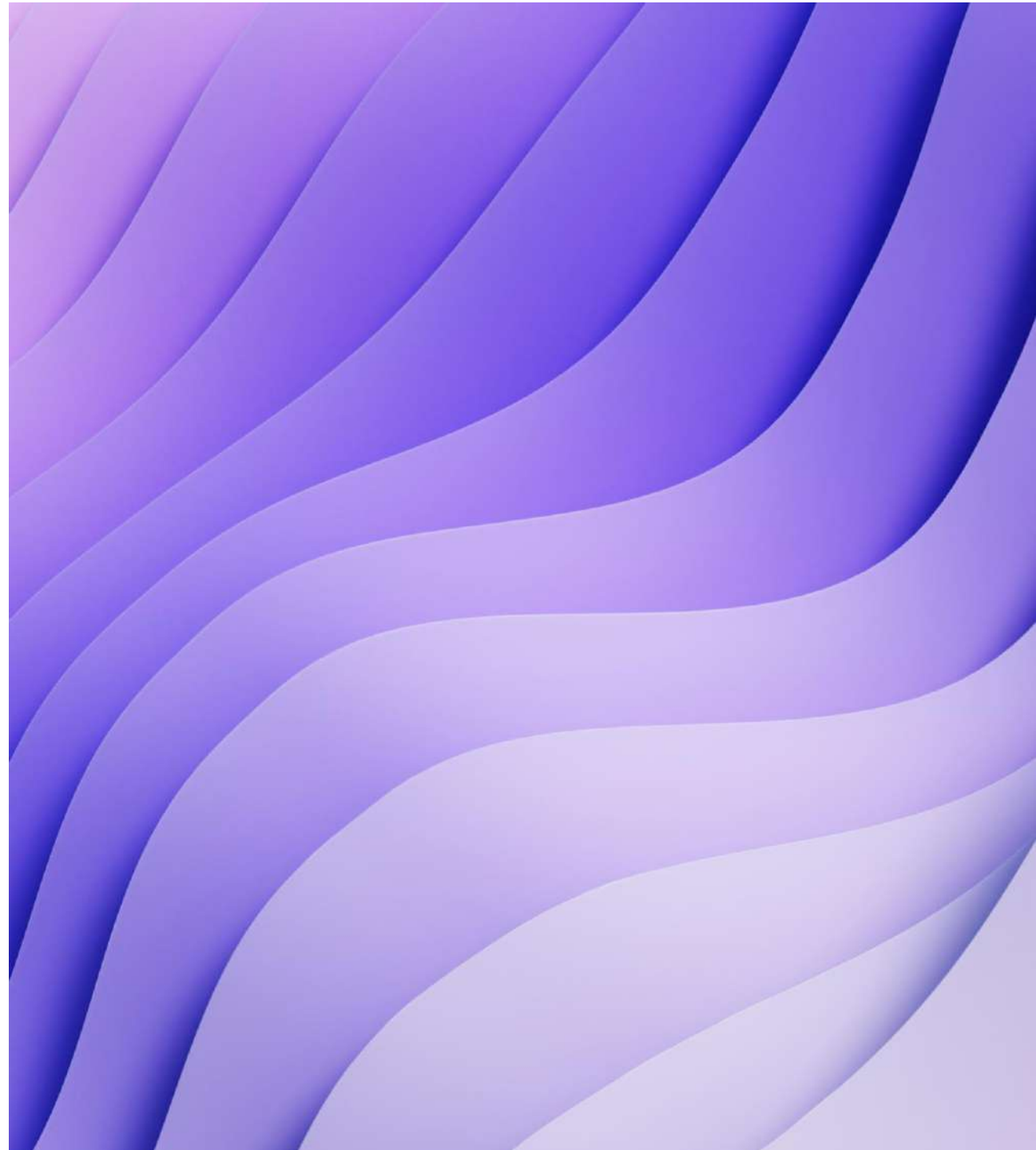


Specialty Sample Size (n)



Physician Influence on Consumer Health Purchasing

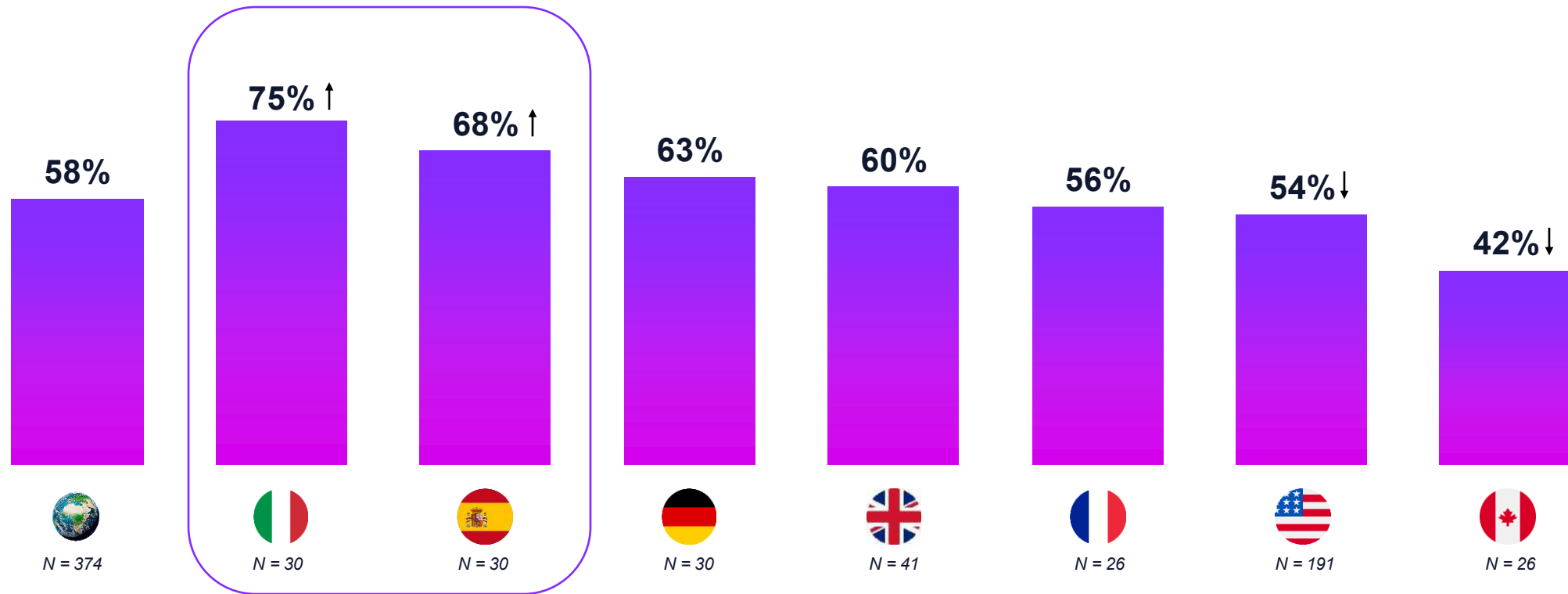
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More than half of physicians report patients asking for consumer health recommendations, even higher proportions in Italy and Spain

Q: What percentage of your patients have asked for your recommendations on consumer health products in the past 12 months?

% of Physicians

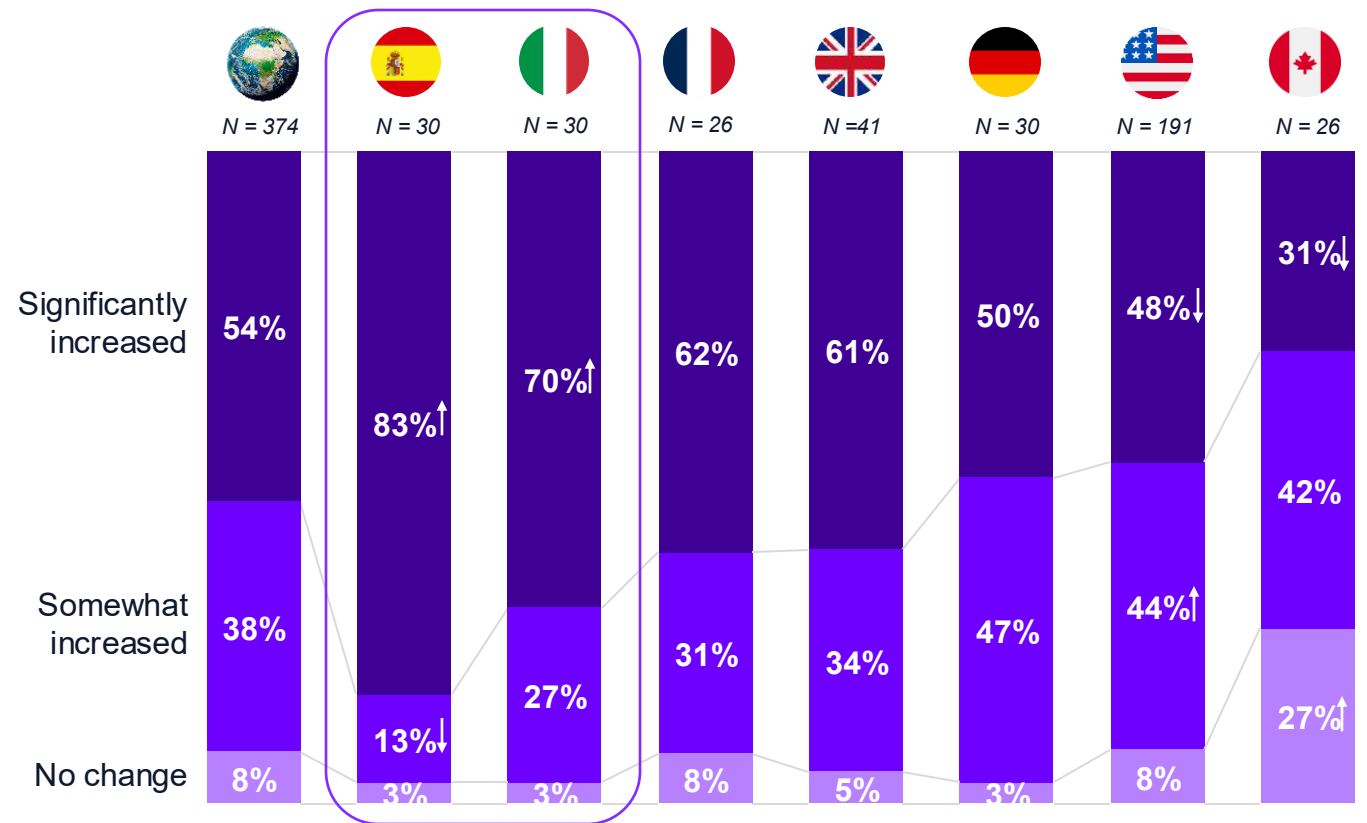


↑ ↓ = Significant difference to global total at 90% confidence

Physicians also seeing increases in requests about healthcare products, especially in Spain and Italy



Q: Have you noticed an increase in patients asking for recommendations for consumer health products over the past 2 years?

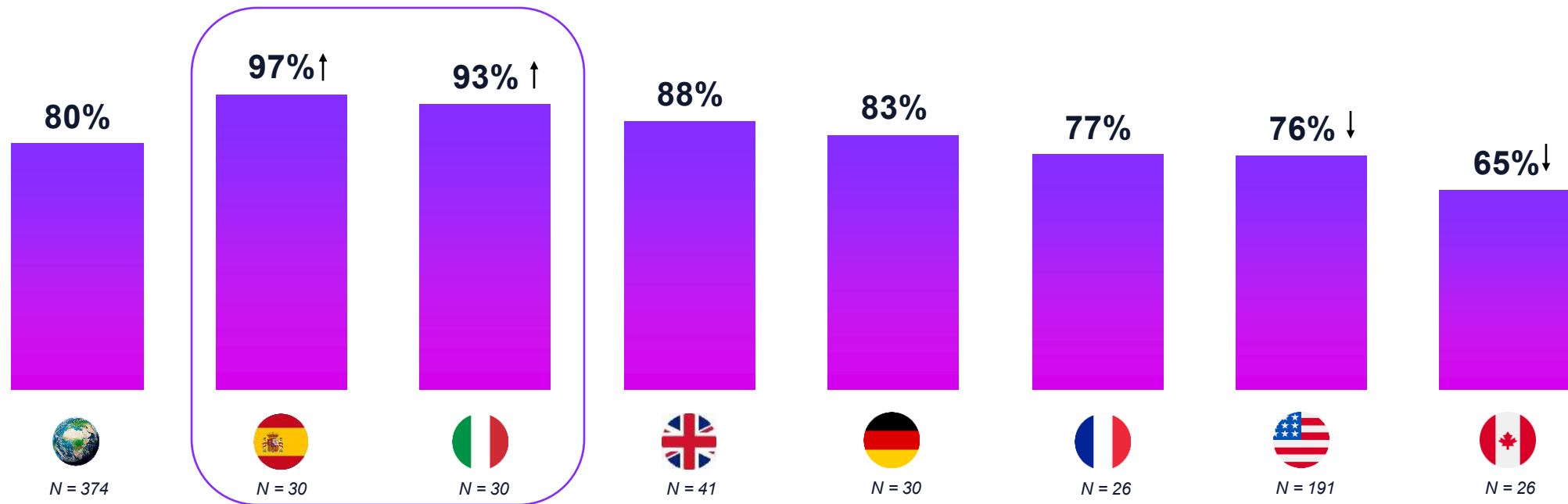


↑ ↓ = Significant difference to global total at 90% confidence

Most physicians view guiding consumer health choices as an important part of their role, especially in Spain and Italy

Q: How important do you believe your role is in helping patients decide which consumer health products to choose?

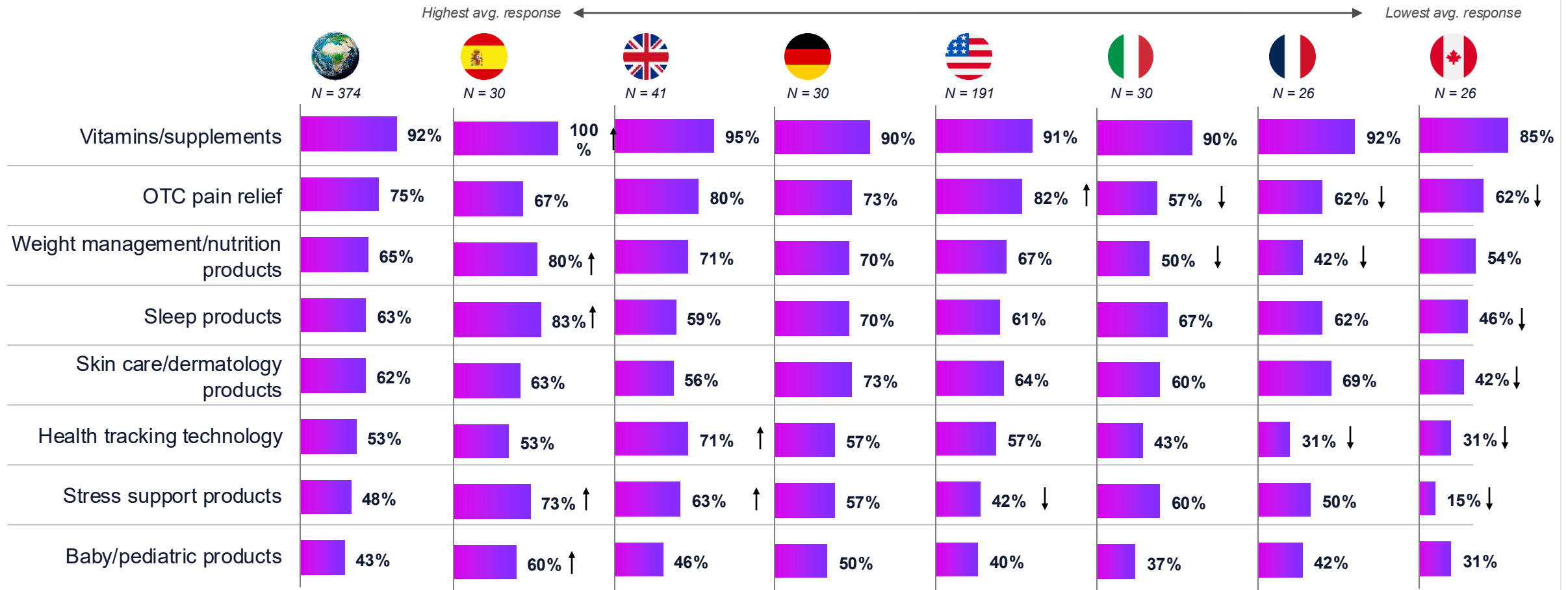
% of physicians rating as important (top 2 box out of 5)



↑↓ = Significant difference to global total at 90% confidence

Vitamins, OTC pain relief, and weight management / nutrition products lead physician recommendations

Q: Which of the following categories do you make product recommendations?



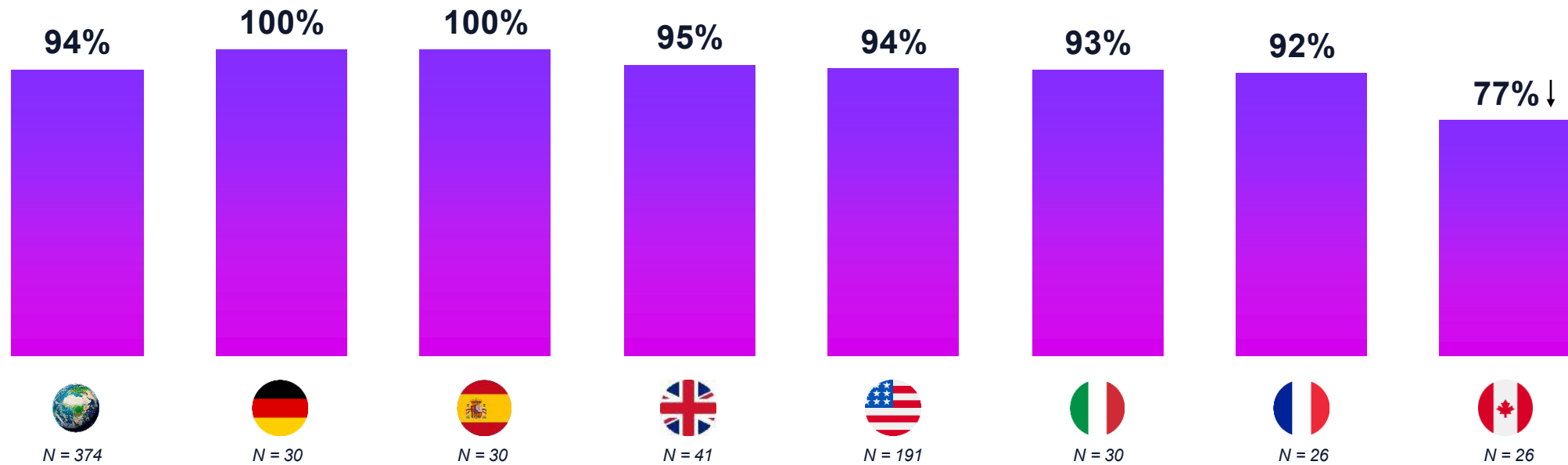
Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q3

↑ ↓ = Significant difference to global total at 90% confidence

Nearly all physicians recall patients purchasing products based on their recommendations

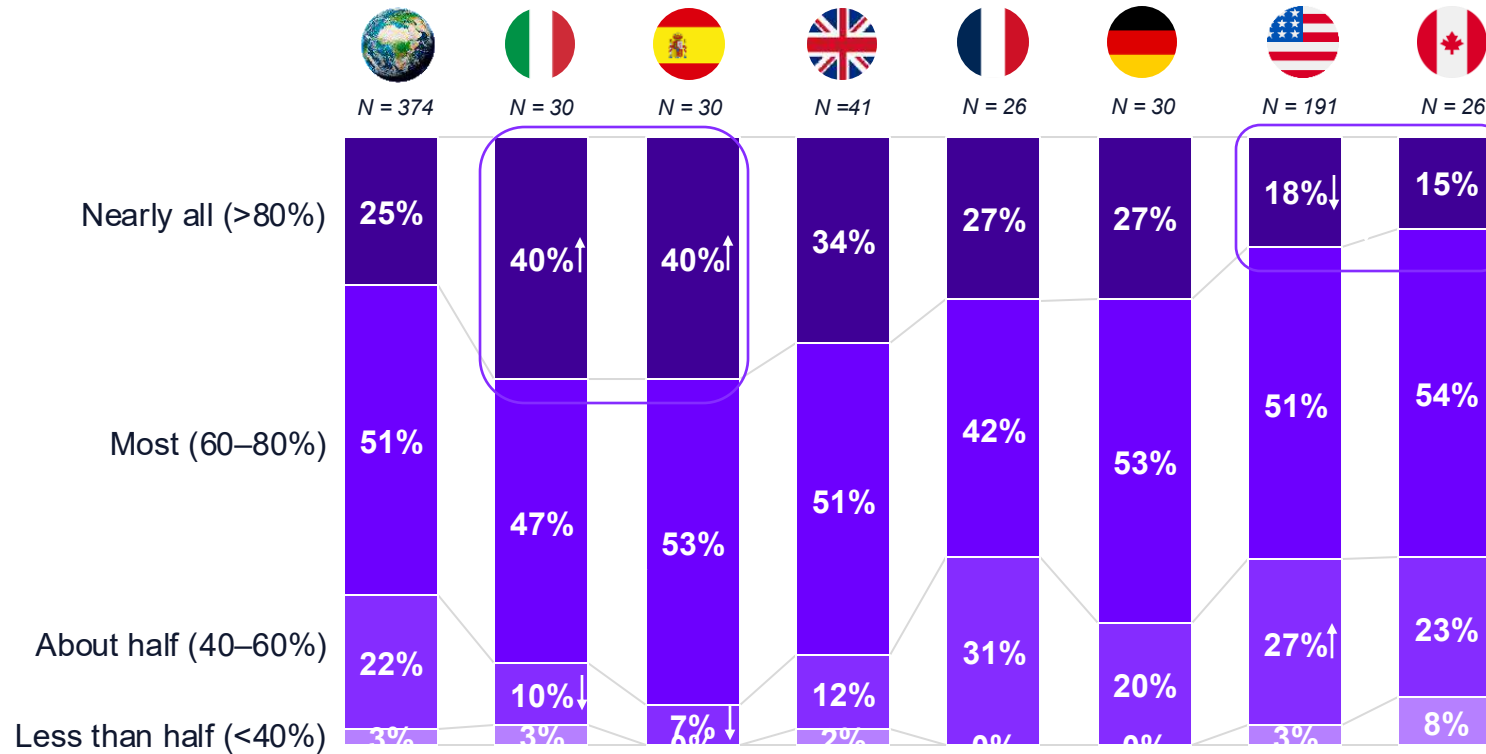
Q: Have patients ever mentioned purchasing a specific product because you recommended it?

% of Physicians responding 'Yes'



Physicians in Italy & Spain may be likely to recommend HC products because they believe most patients will follow recommendations, less so in the US / CAN

Q: Approximately what percentage of your patients would you say follow your product recommendations?

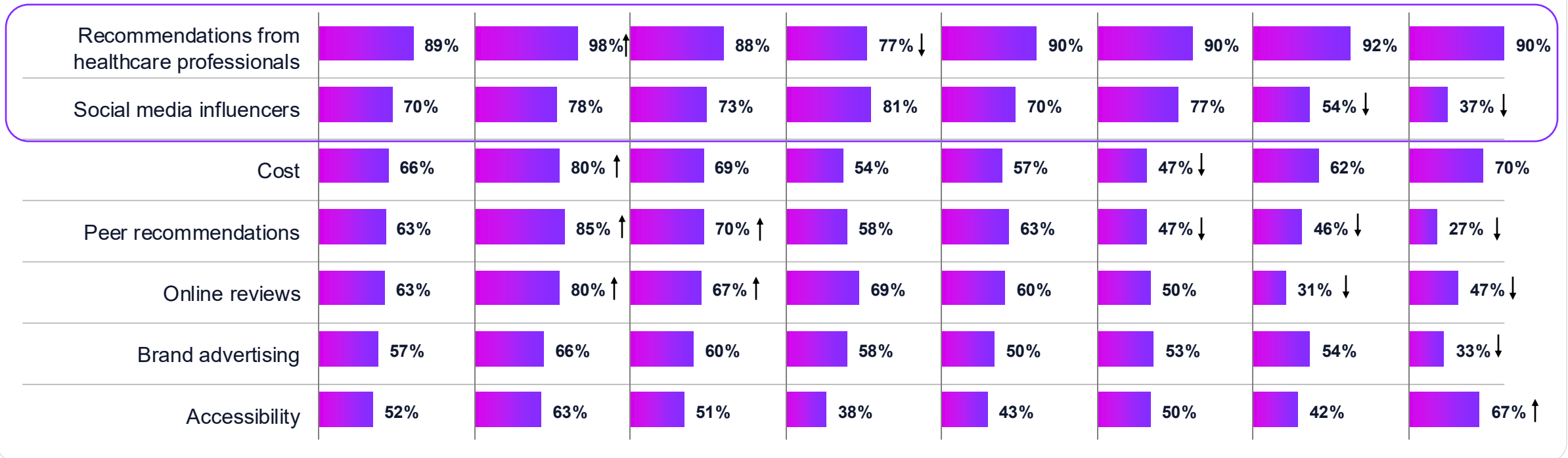


↑ ↓ = Significant difference to global total at 90% confidence

Physicians globally know their recommendations are influential, but also recognize consumers simultaneously weigh social media info

Q: Which of the following factors do you believe influence consumer purchasing decisions for consumer health products?

Highest avg. response ← → Lowest avg. response

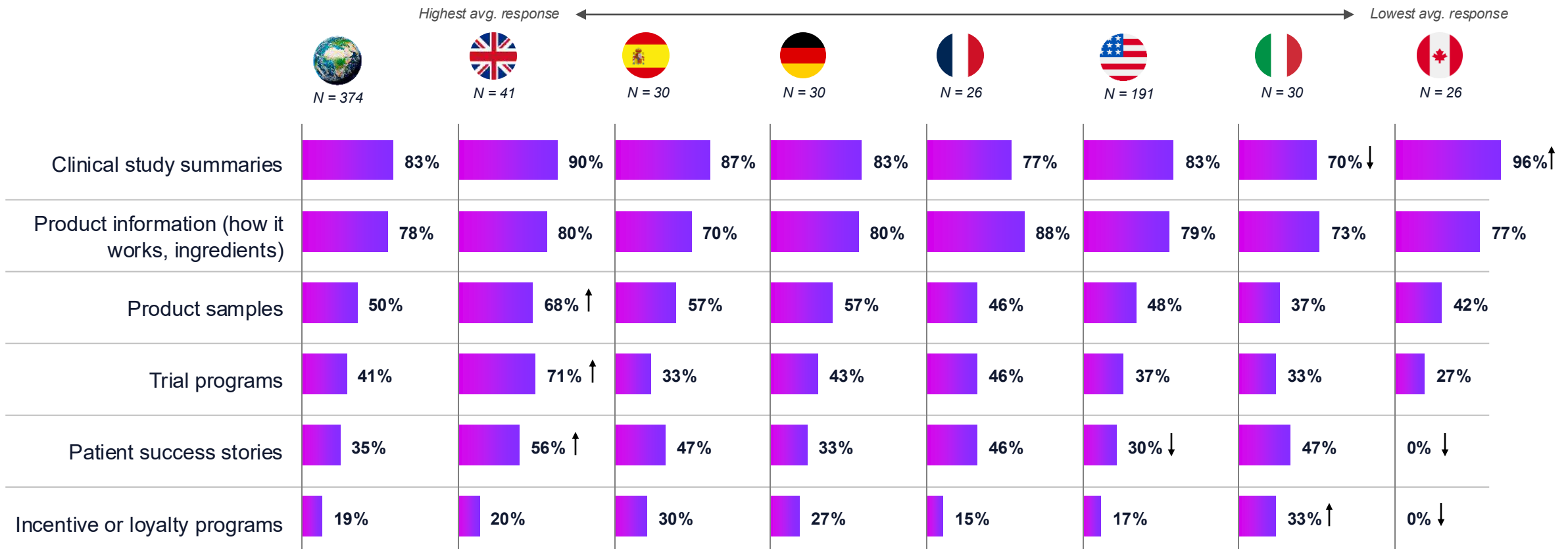


↑ ↓ = Significant difference to global total at 90% confidence

Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q7

Clinical studies, journals, and official product information portals are the best way to reach physicians

Q: How would you prefer consumer brands engage with you about new products?



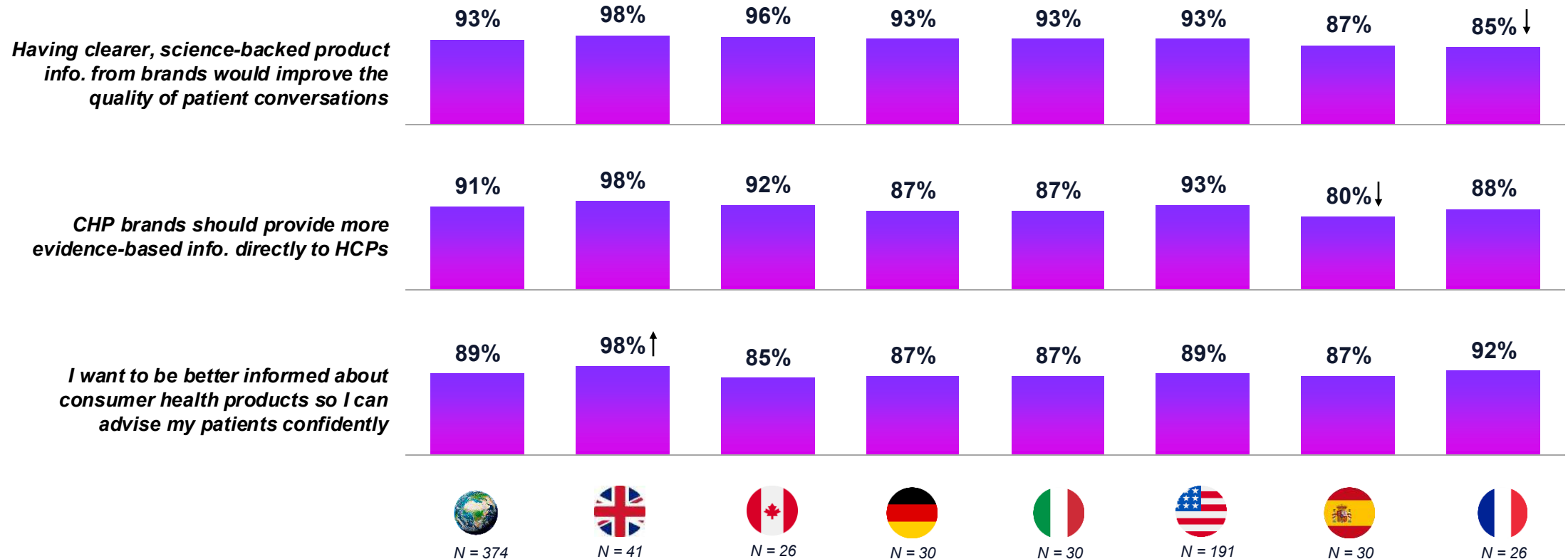
Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q12

↑ ↓ = Significant difference to global total at 90% confidence

There is strong global desire for clearer and evidence-based healthcare product information

Q: How much do you agree or disagree with the following statements about consumer health products?

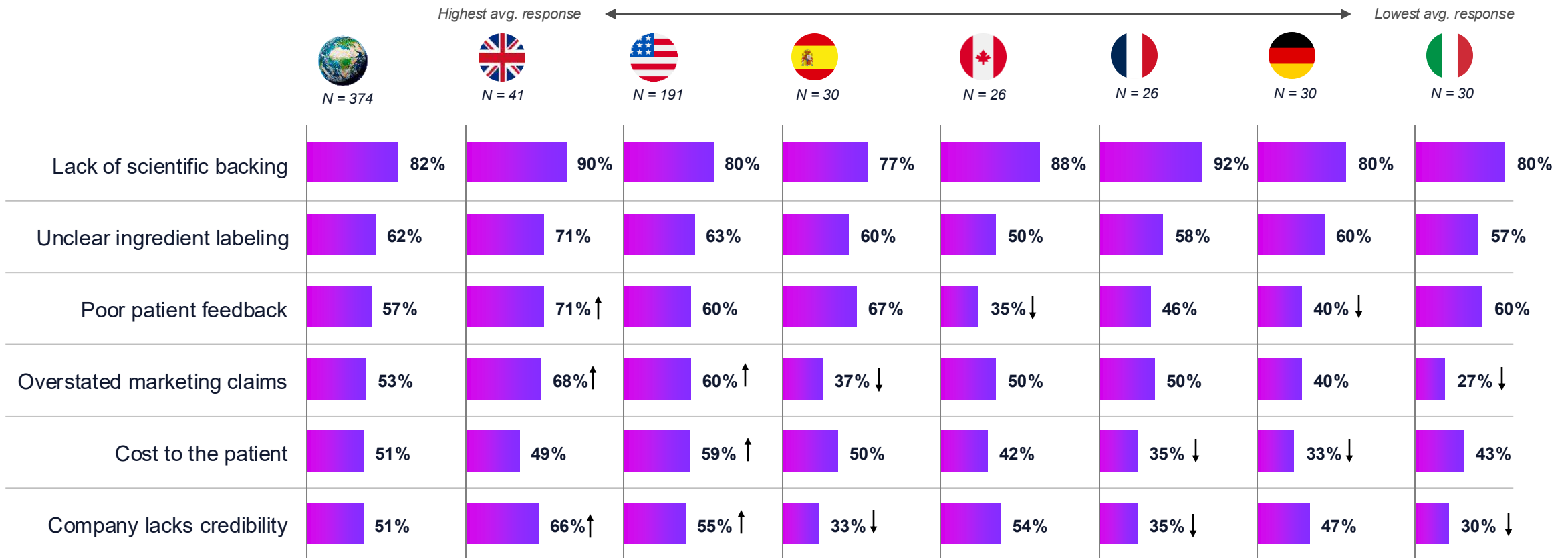
% of physicians who agree (top 2 box out of 5)



↑ ↓ = Significant difference to global total at 90% confidence

Lack of evidence and clarity are primary barriers to recommendation

Q: What makes you less likely to recommend a consumer health product to a patient?

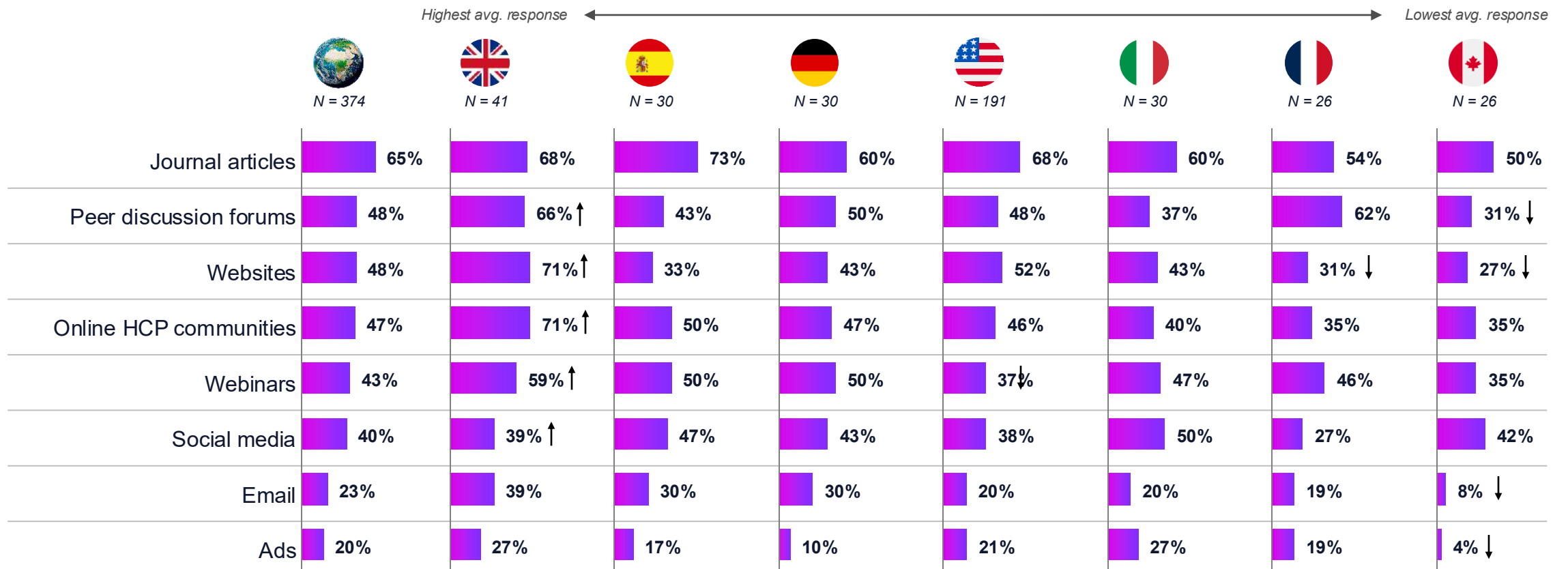


Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q9

↑ ↓ = Significant difference to global total at 90% confidence

HCPs prefer clinical and peer-driven digital channels over traditional advertising

Q: Which digital formats are most effective for learning about new health products for your patients?



Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q11

↑ ↓ = Significant difference to global total at 90% confidence

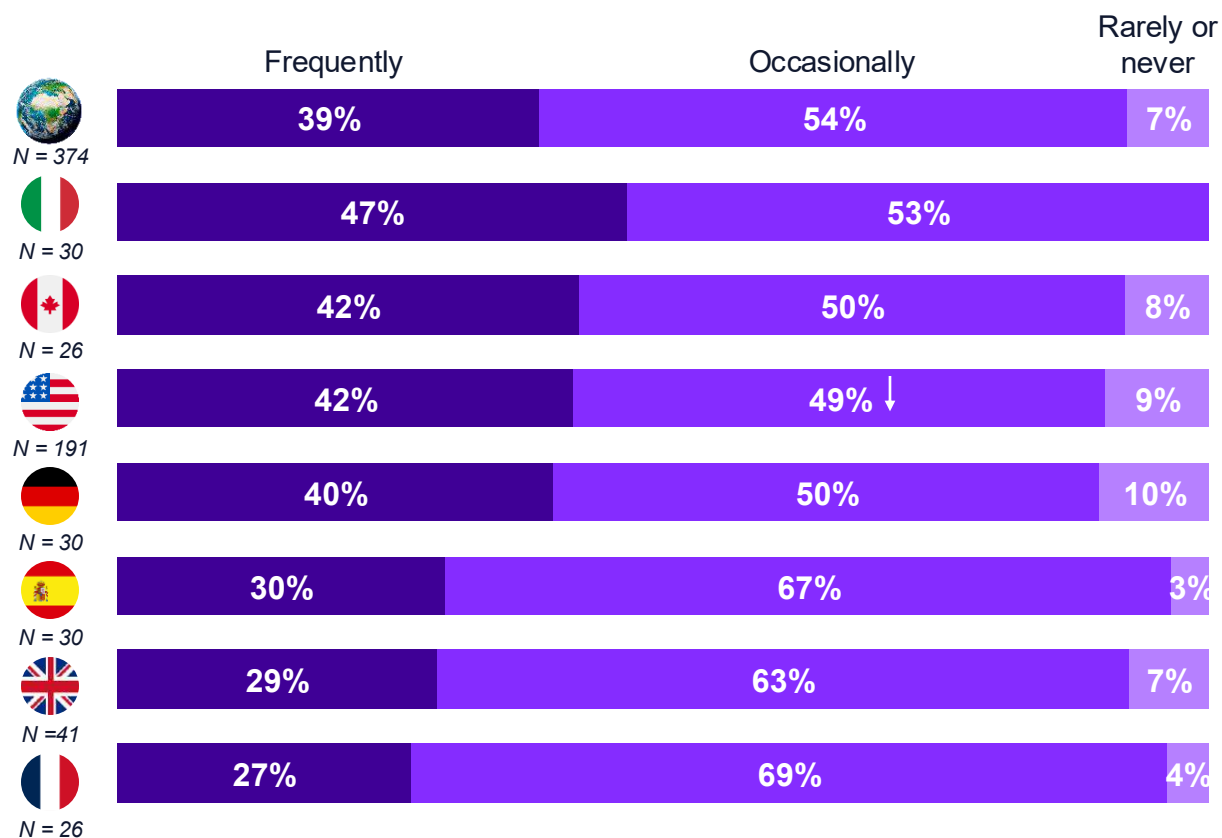
Deep Dive: Physician Influence & OTCs



HCPs in all markets recommend OTCs with prescriptions occasionally or more



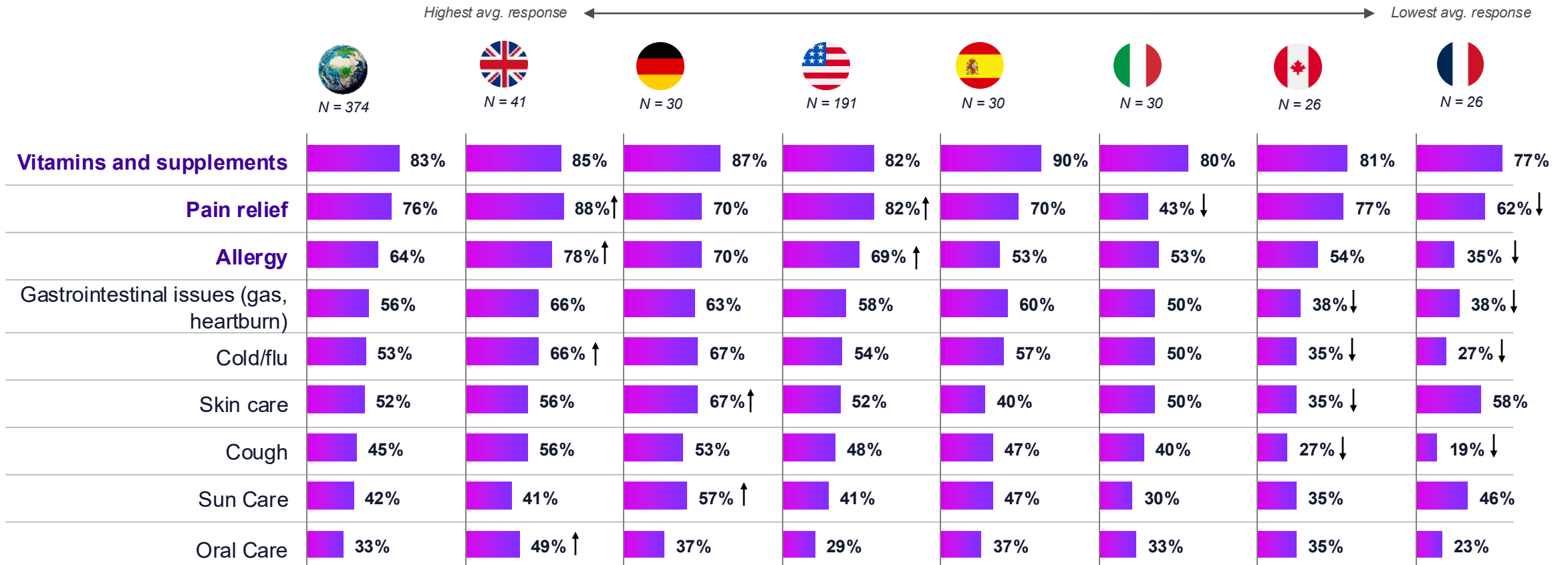
Q: How often are you recommending an OTC in conjunction with a prescription?



↑ ↓ = Significant difference to global total at 90% confidence

Vitamins, pain, and allergy OTCs are the most recommended across all markets

Q: Which of the following OTC categories do you make product recommendations?

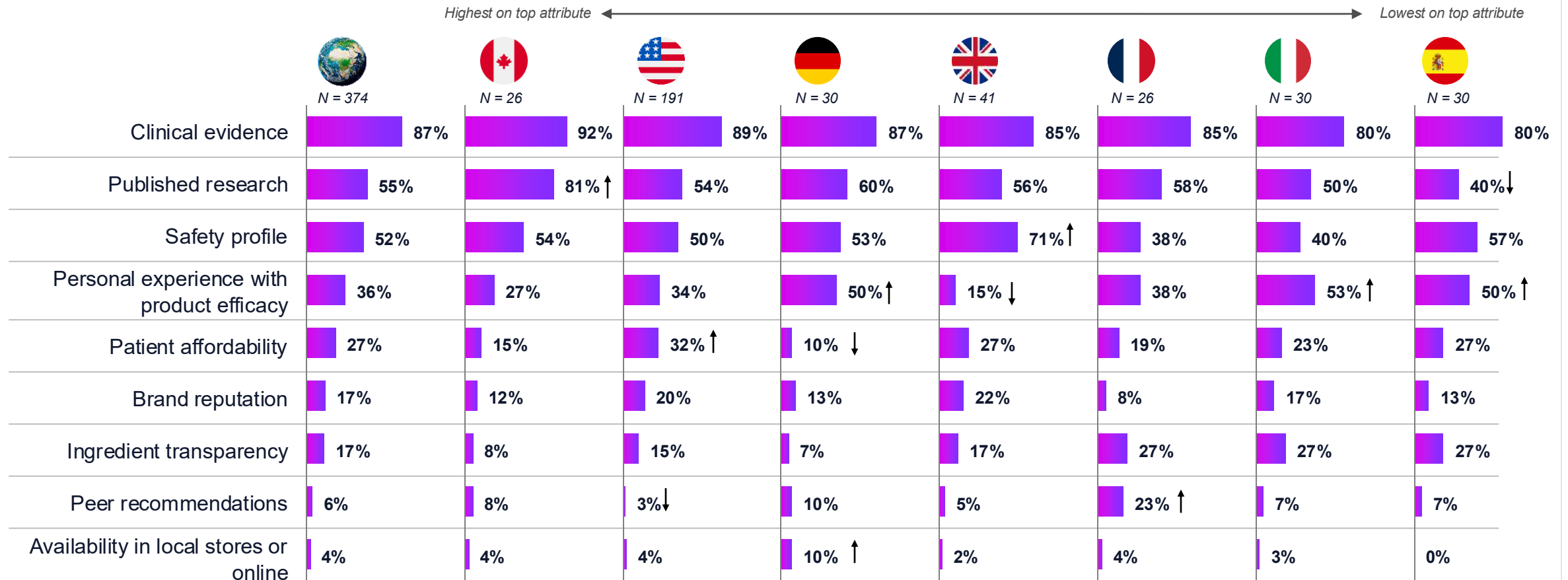


↑ ↓ = Significant difference to global total at 90% confidence

Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q17

Evidence, research and safety drive OTC recommendation decisions

Q: When recommending OTCs, which factors are most important to you?

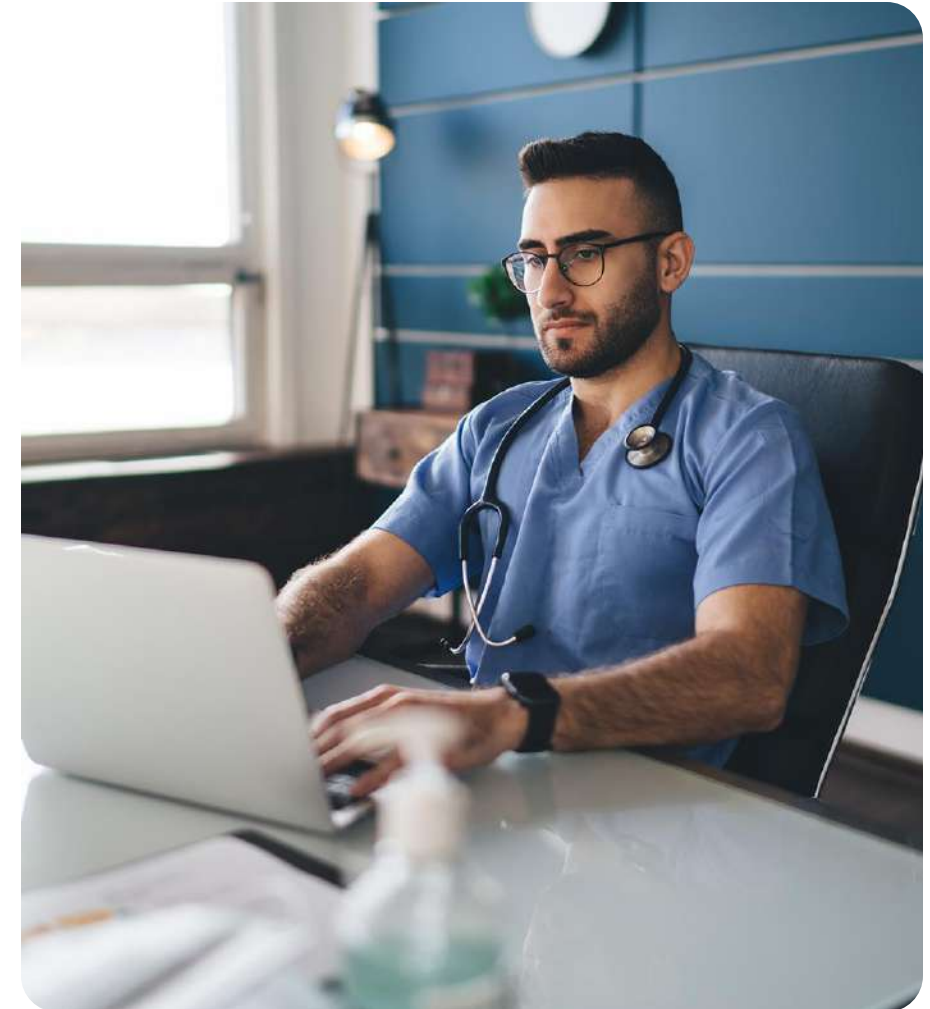
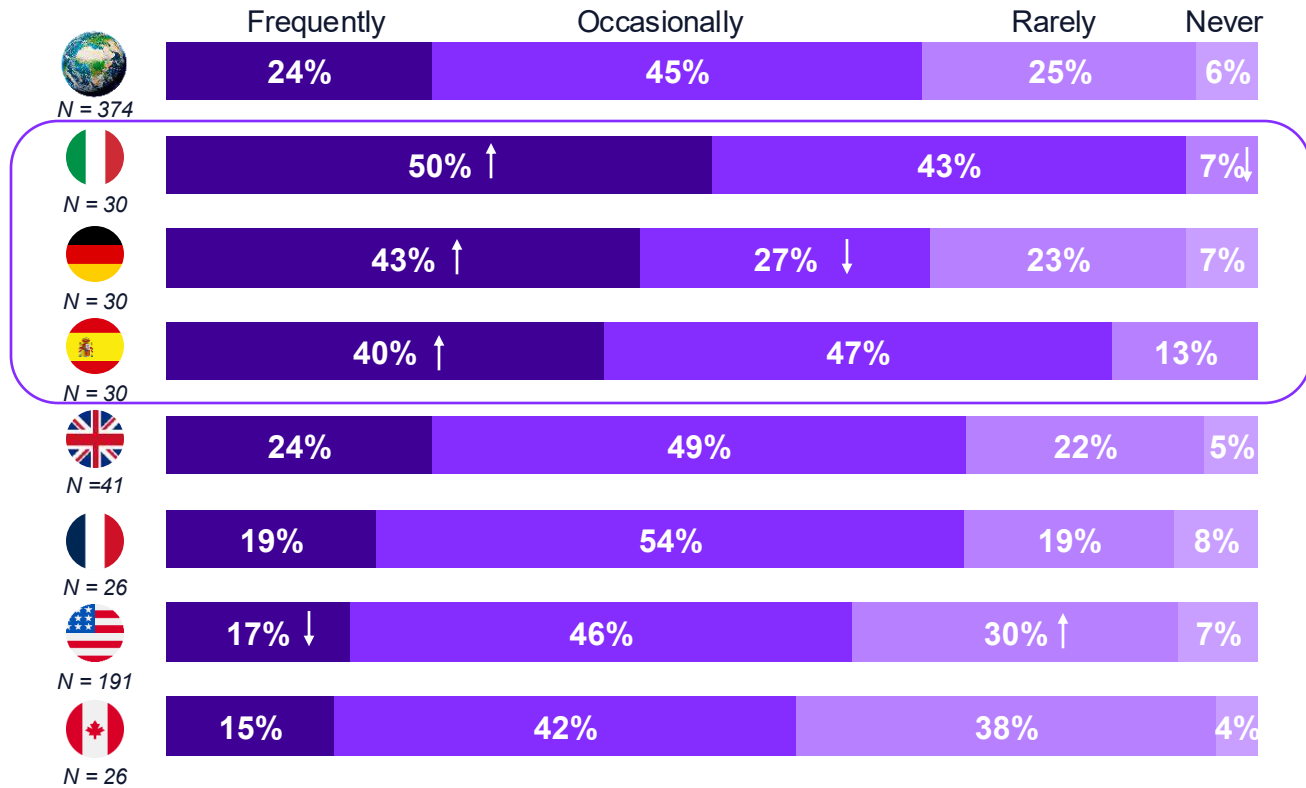


Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q14

↑ ↓ = Significant difference to global total at 90% confidence

HCPs in Germany, Italy, and Spain receive OTC promotions most frequently

Q: In a professional setting, how often do you receive educational or promotional information about OTC brands?



↑ ↓ = Significant difference to global total at 90% confidence

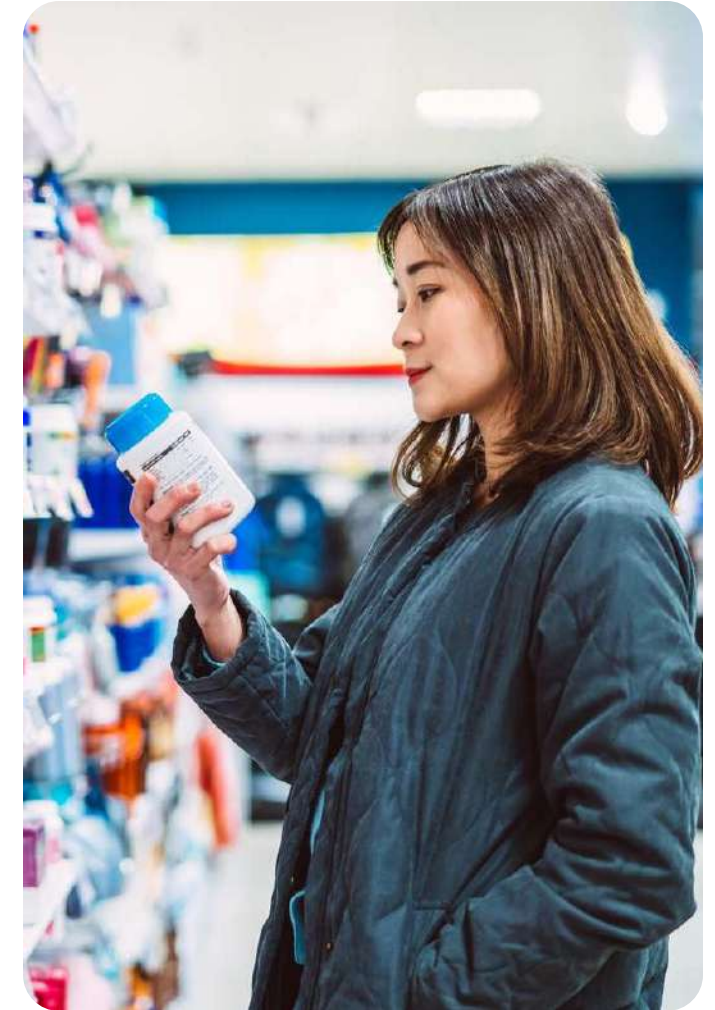
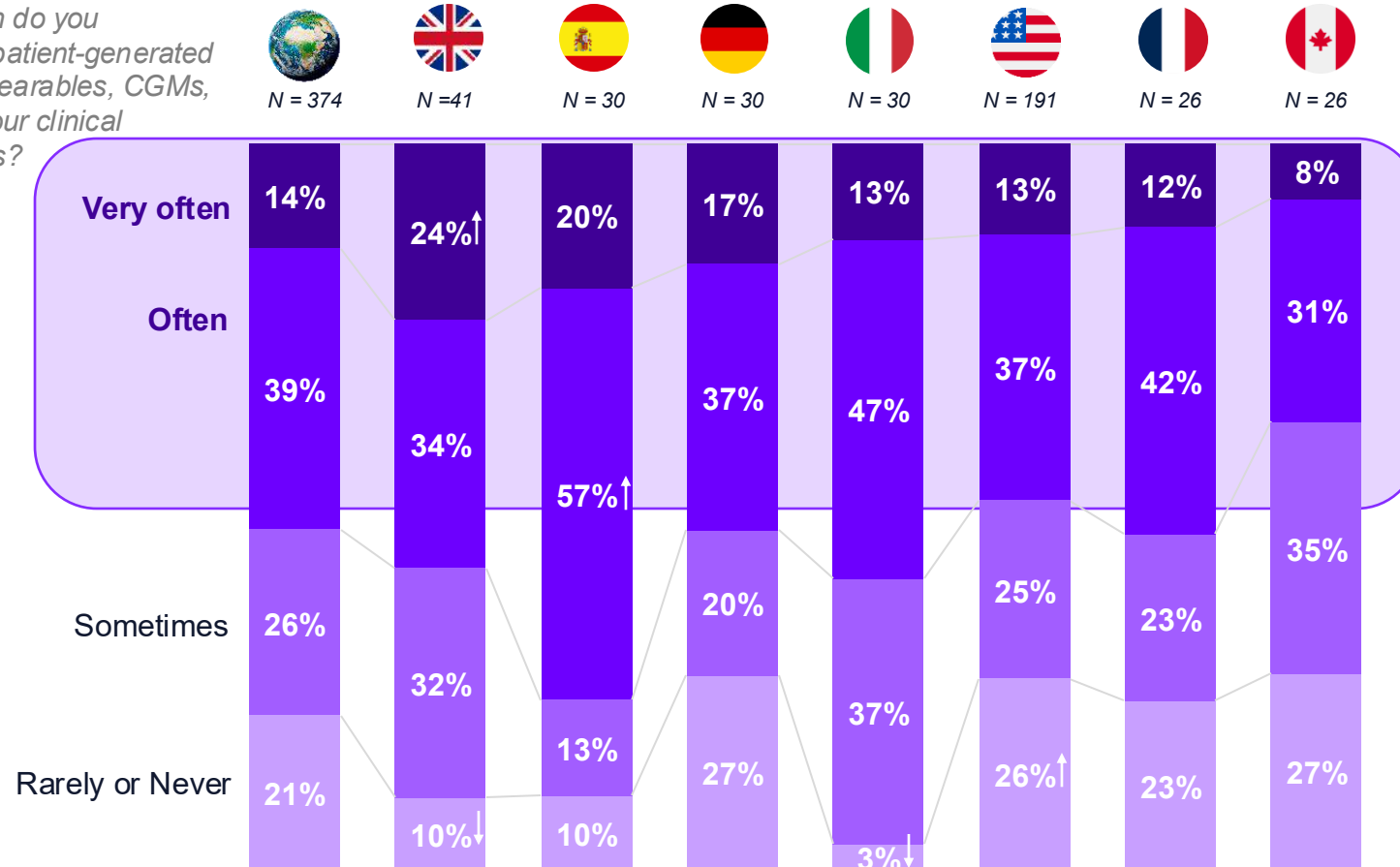
Deep Dive: Physician Influence & Wearables

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Data from wearables is incorporated into HCP assessments often in most markets

Q: How often do you incorporate patient-generated data (from wearables, CGMs, apps) into your clinical assessments?

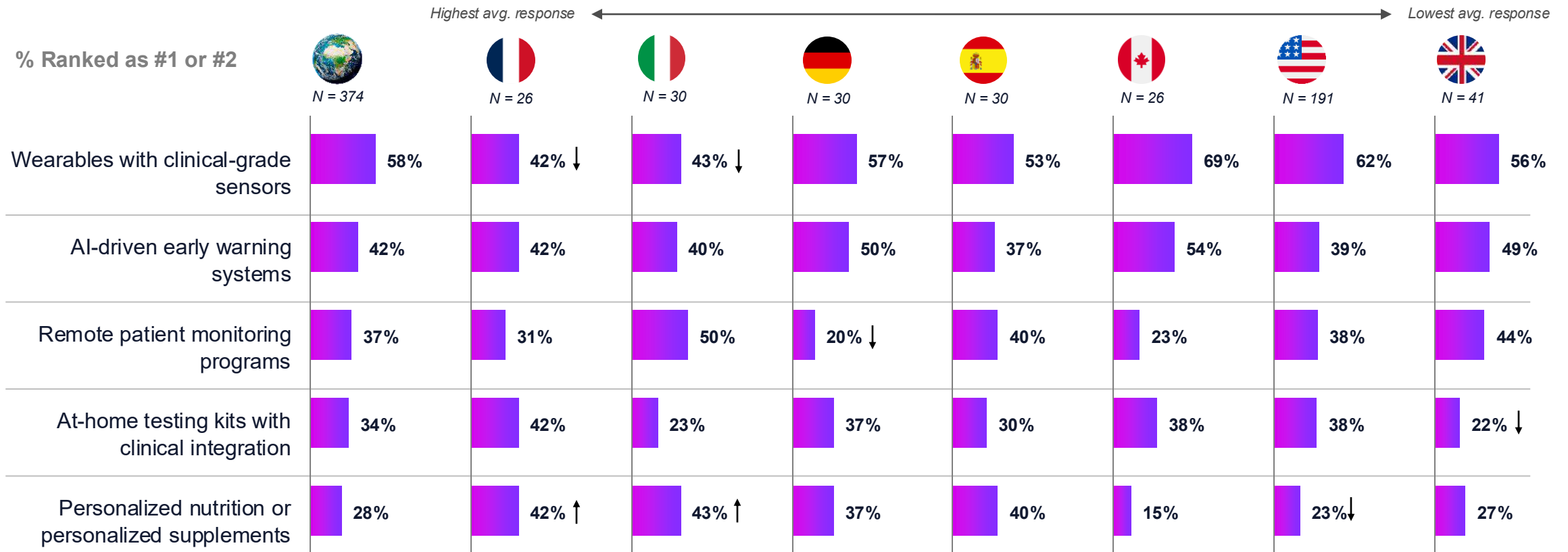


↑↓ = Significant difference to global total at 90% confidence

Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q19

In most markets, HCPs see technical/clinical wearables as having the greatest near-term application

Q: Rank the following innovations in the order you believe will have the greatest impact on preventive health in the next 3–5 years?

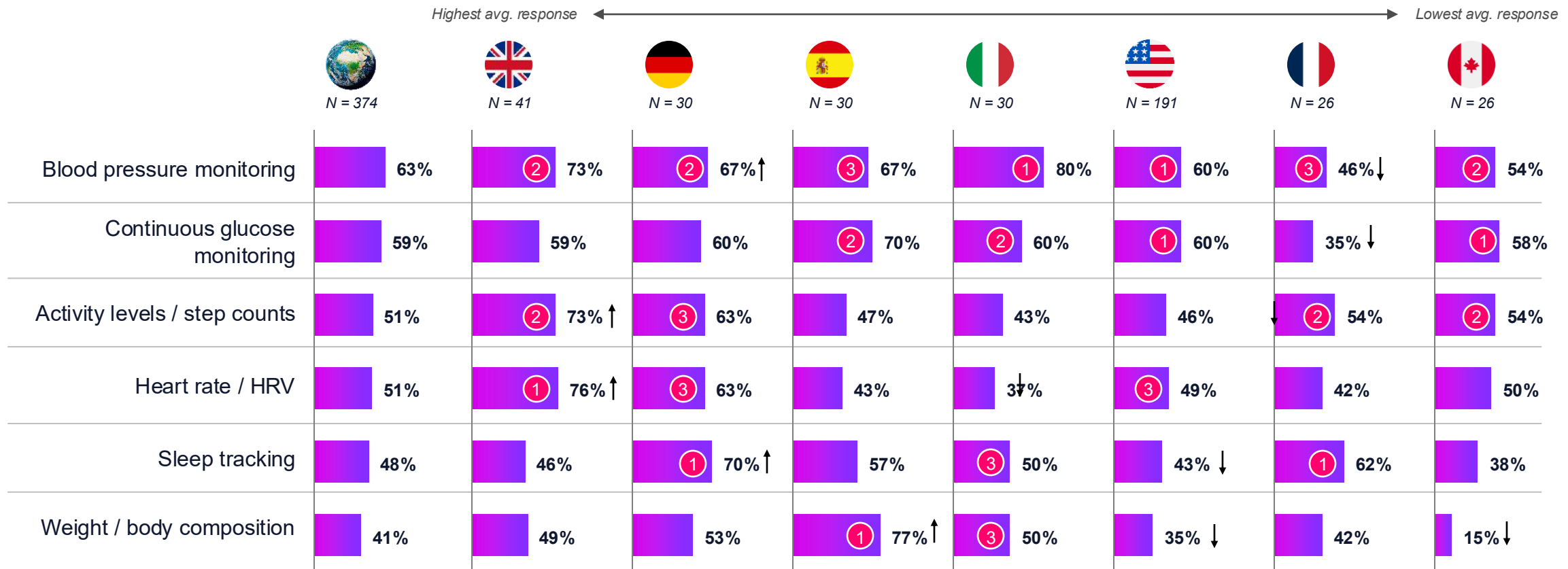


Personalized nutrition is valued in EU markets, and not in North Am.

↑ ↓ = Significant difference to global total at 90% confidence

Physicians across markets value different aspects of health data from wearables

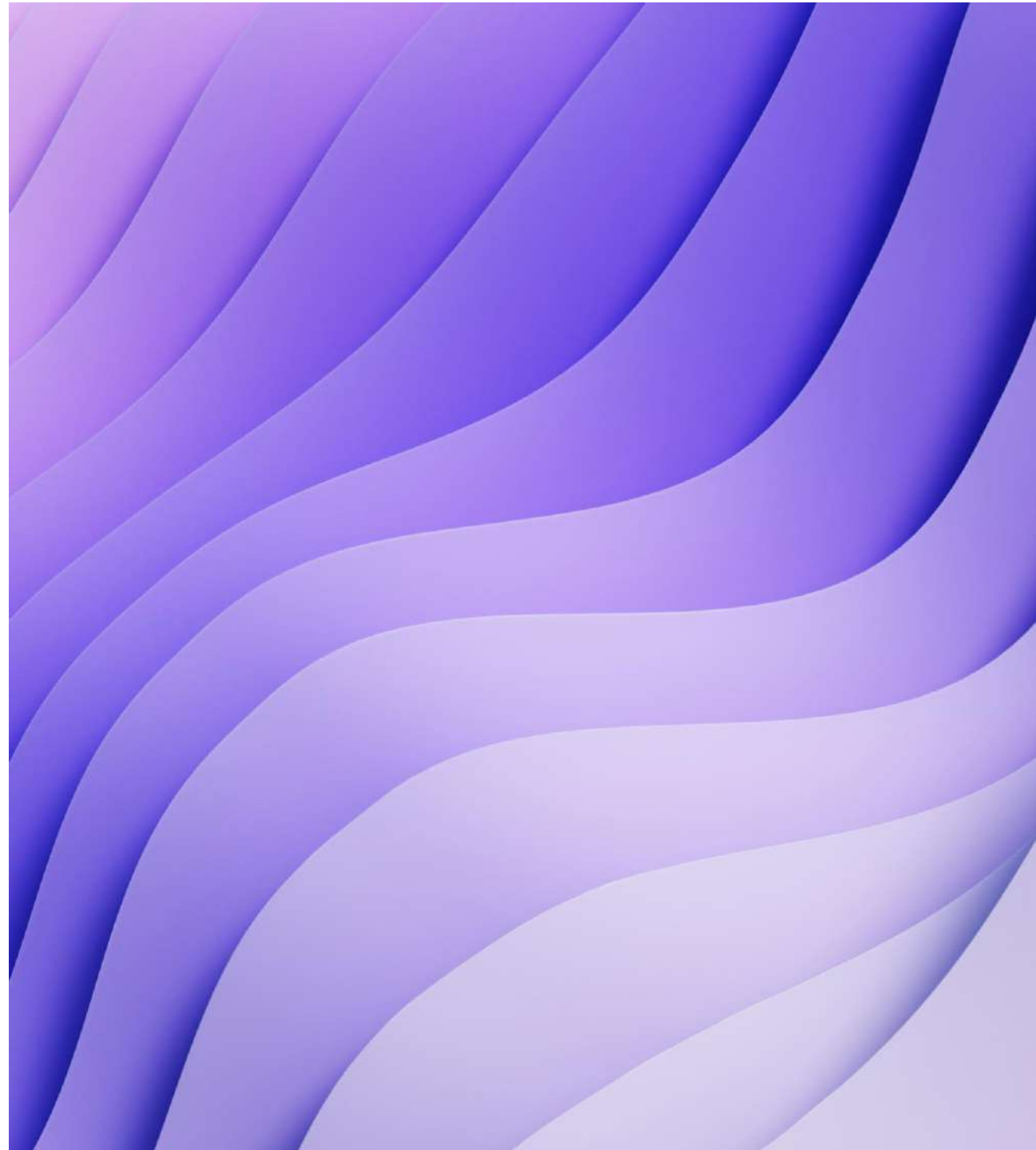
Q: Which types of patient-generated health data from wearables do you find most clinically useful?



Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q18

↑ ↓ = Significant difference to global total at 90% confidence

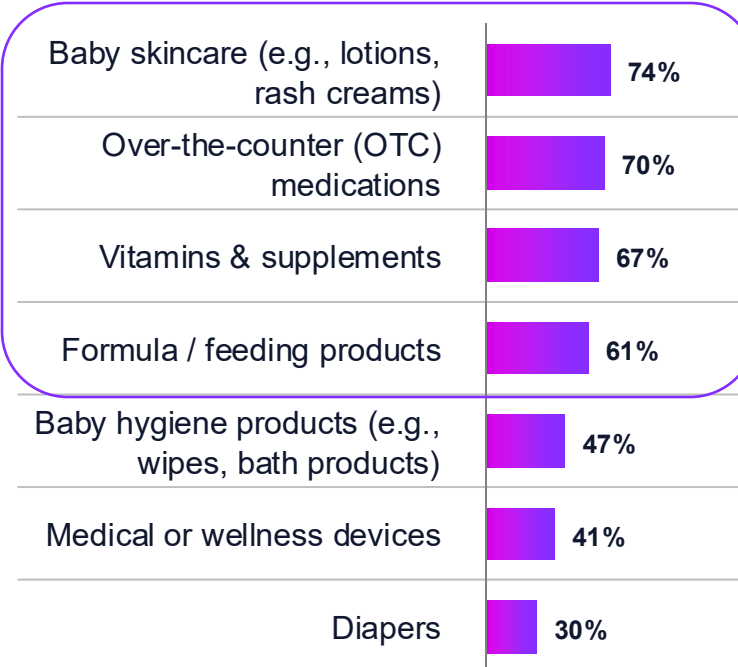
Deep Dive: Physician Influence & Baby Products



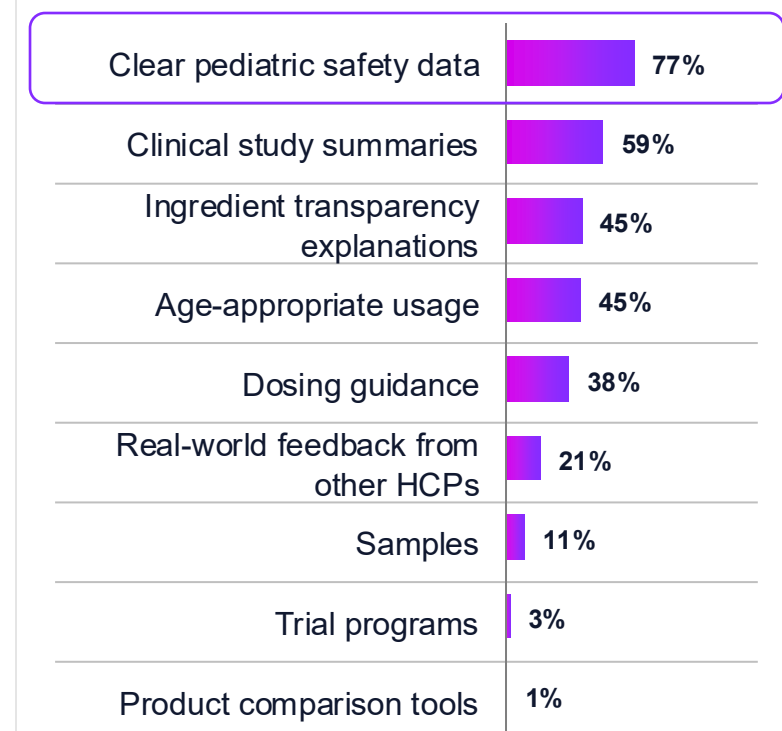
HCPs are very likely to recommend baby skincare products, OTCs, supplements, and feeding products; they look for product safety data above all



Q: Which of the following baby products do you make product recommendations for to your patients?



Q: What types of information from baby/children's product brands would most improve your confidence in recommending their products?



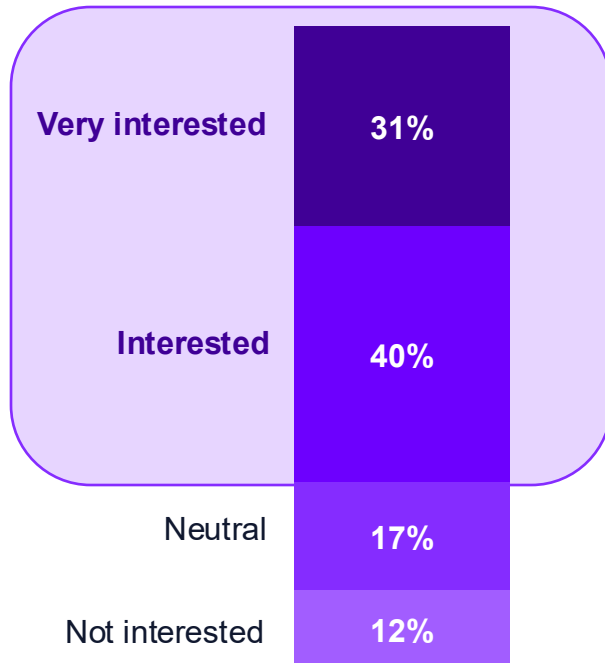
Respondent sample for data shown includes PCP, Pediatrician, OBGYN, and pharmacist respondents (other specialties did not receive these questions)

Source: RealTime HCP Sentiment 19 study, February 2026. N=374 physicians in North America & EU5; Q24, Q25

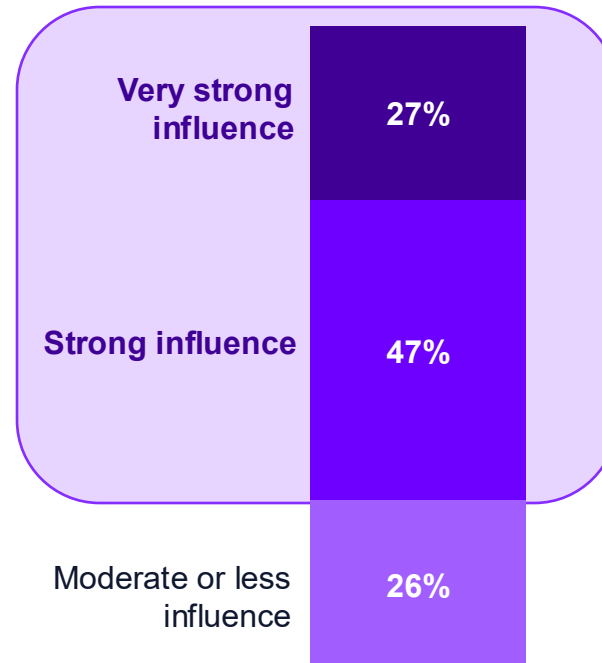


Over 70% of HCPs are interested in baby/child product updates, and most believe their recommendations to parents are influential

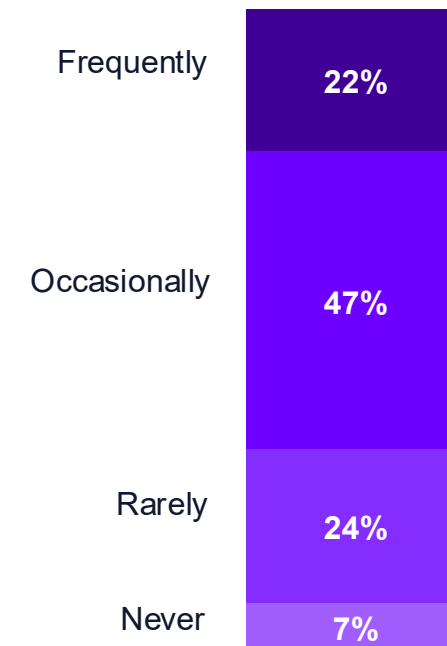
Q: How interested are you in receiving product updates directly from baby/children's brands?



Q: How much influence do you believe your recommendation has on parents' purchasing decisions for baby/children's products?



Q: How often do you receive educational or promotional information about baby/children's products in a professional setting?



Respondent sample for data shown includes PCP, Pediatrician, OBGYN, and pharmacist respondents (other specialties did not receive these questions)



Reach, engage & convert real doctors

Sermo is where health brands go to grow

Brands who advertise on Sermo see on average:



+35%

Lift in unaided awareness of their brand



+34%

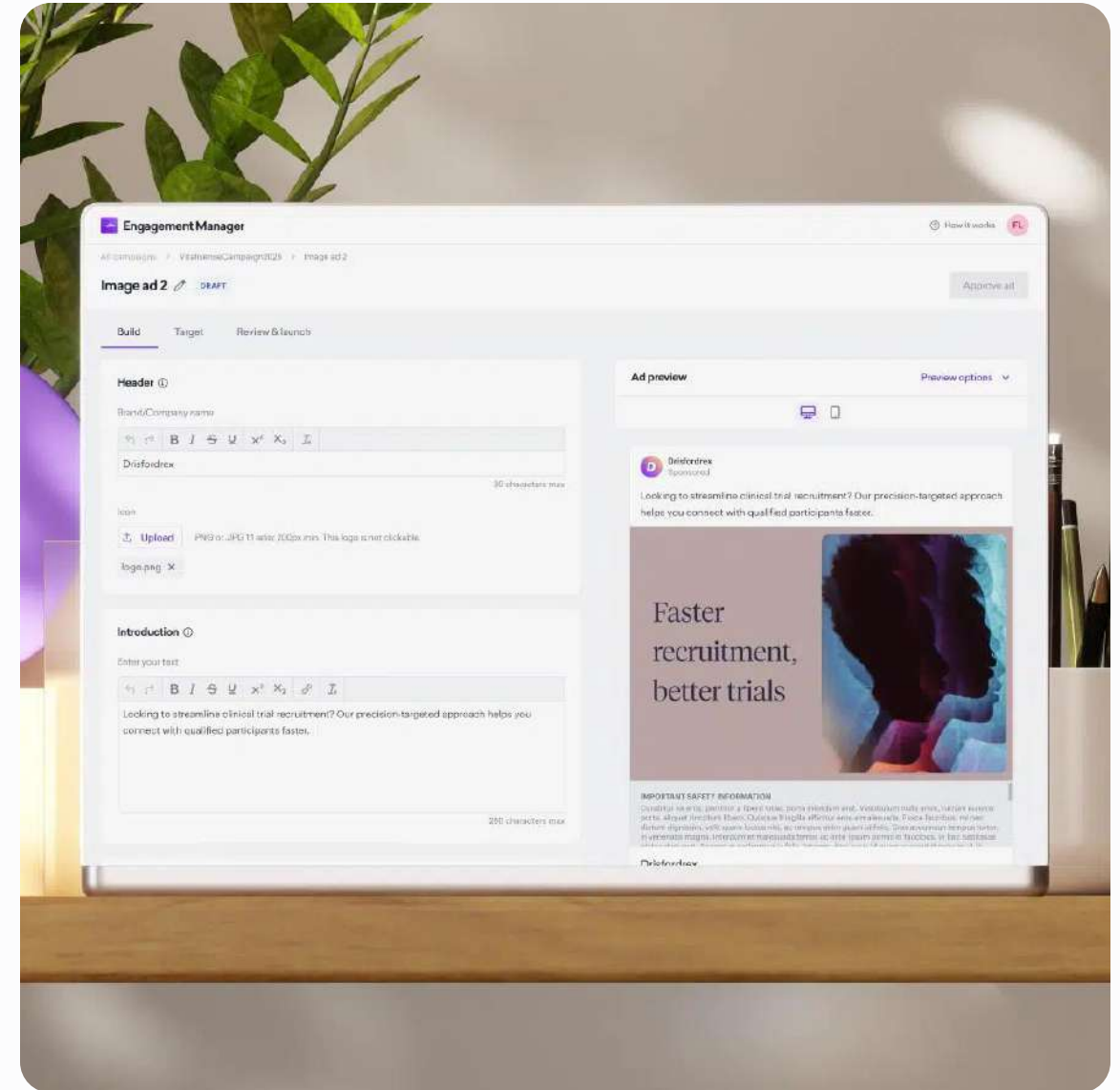
Lift in intend to talk to peers about their brand



+19%

Lift in intend to recommend their brand

Source: Sermo Program Impact Benchmarks 2026



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