The Digital Day of an HCP

May 2, 2019

SERMO

Sermo is a global physicians-only social network and the leading healthcare data collection company **so we know HCPs**.

In fact, we know **over a million** of them.

Let's take a look at how our HCP network leverages tech in their day-to-day, including:

TV

Social Media

Practice Tools

Technology is seen as a double-edged sword

We asked physicians to share what they like and don't like about technology during their day-to-day.
Here's some highlights:

Pros

- ✓ Information & evidence readily available
- ✓ Ease of use
- ✓ Access to colleagues, friends, and family in other areas
- ✓ Stay updated
- ✓ Free, quality information

Cons

- ✕ Inaccurate data
- ✕ Addiction
- ✕ Work can reach you anywhere
- ✕ Distracting/waste of time
- ✕ Increased documentation / paperwork

HCPs begin & end their day with technology

3 in 4

(74%) physicians start their day on their phone

Computer/iPad (17%)

TV (4%)

Wearable device (1%)

52%

of physicians end their day on their phone

Computer/iPad (29%)

TV (16%)

Wearable device (2%)

65% of physicians spend at least 1-4 hours a day online

Tube time

The majority of physicians watch between
5-10 hours of television per week

Most popular programming:

sports

primetime comedy/drama

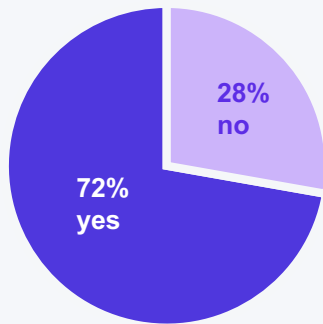**34% feel that ER is the the most medically accurate TV show**

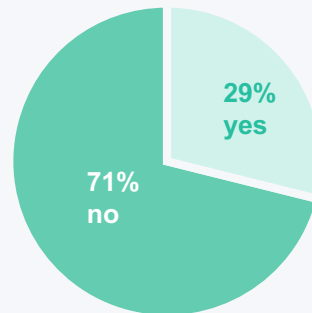**45% say Dr. House is the pop culture doctor they would most like to work with**

Source: MM&M Infographic "What HCPs are watching on TV" April 2019. Data powered by Sermo RealTime; Sermo Poll August 2018

Time to change the channel?

Does Pharma advertise too much on TV?

28% no

72% yes

Are DTC TV ads useful for your professional life?
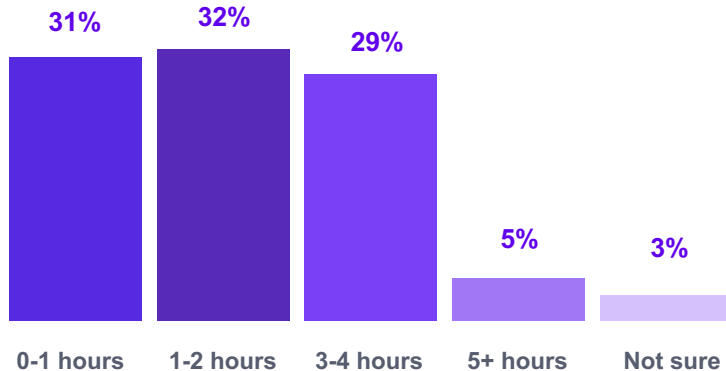
29% yes

71% no

The opportunity: reach physicians with brand marketing in **new, native ways** to deliver more value
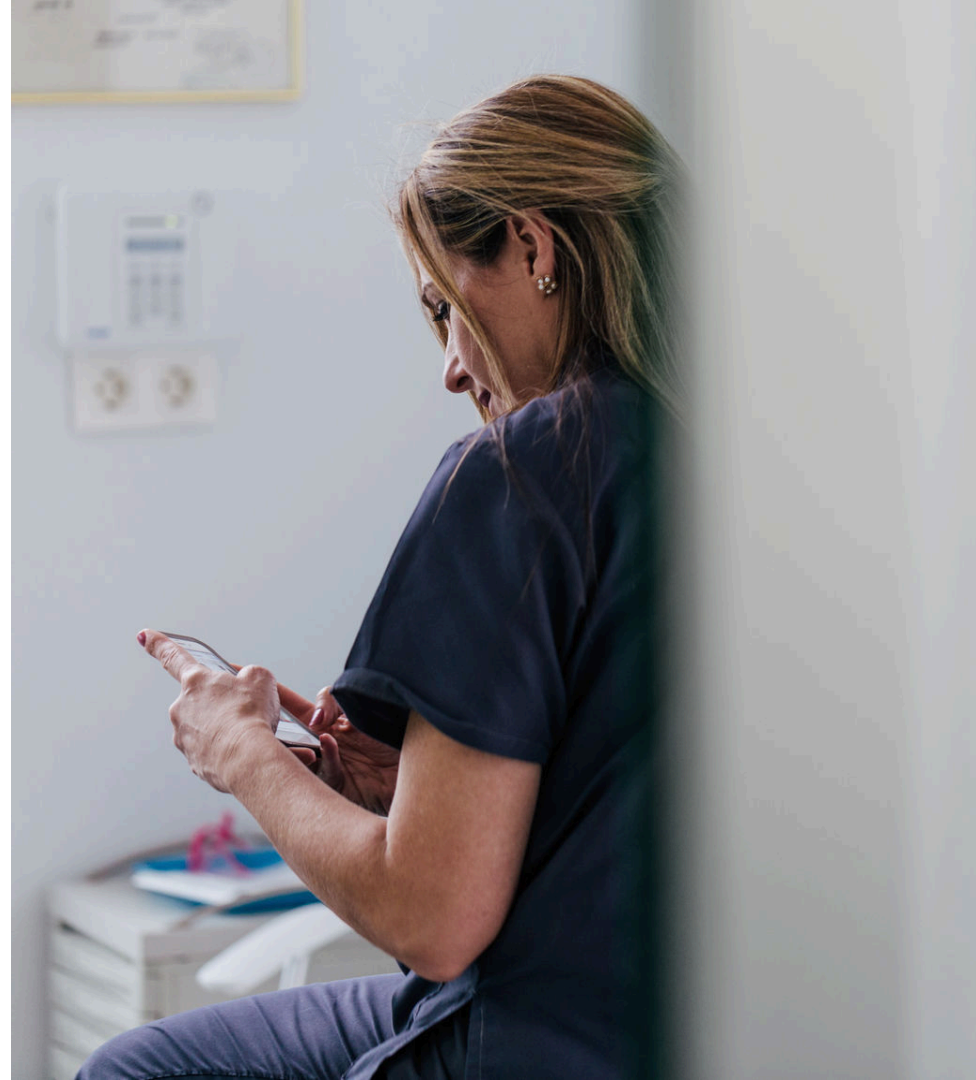
Social media

Like us, physicians are glued to the screen

How much time do you spend social networking a day? (*Includes public platforms and private platforms such as Sermo*)

31%	32%	29%	5%	3%
0-1 hours	1-2 hours	3-4 hours	5+ hours	Not sure

On par with the national average
On average, people spend 2 hours and 22 minutes per day on social networking and messaging platforms.
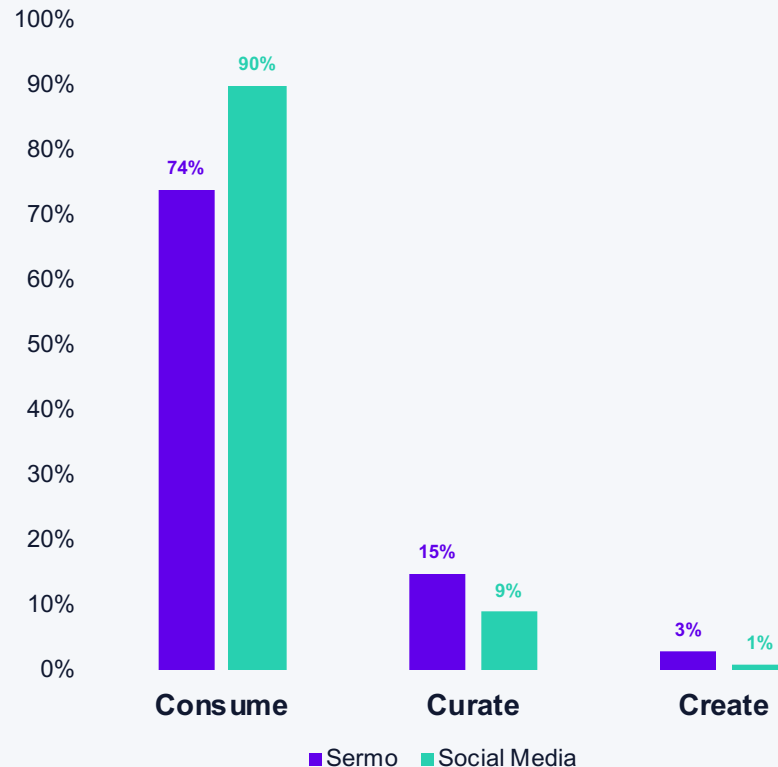
How do physicians behave on social media platforms?

Social media usage by HCPs falls into three broad content categories:

- **Create:** create original content

- **Curate:** comment on posts, participate in group discussions, and share information with other members

- **Consume:** finding and read relevant information related to their practice

Physicians on Sermo **create and curate** more content vs. other social media sites

Consume — Sermo 74%, Social Media 90%
Curate — Sermo 15%, Social Media 9%
Create — Sermo 3%, Social Media 1%

■ Sermo ■ Social Media

The power of closed social networks

Private & secure HCP-only social networks are a key destination for online medical research and learning

89% trust the information they see on Sermo because it is a secure online medical network

93% learn new things on Sermo about medicine that benefits their practice

To be or not to be (anonymous)

In support of anonymity…

Our physicians feel there is **risk** associated with participating openly in online communities and discussions with their **real identity**.

55%
do not feel comfortable **publicly using their real name** in online communities and social media sites

62%
do not feel comfortable **using a photo of themselves** in online communities and social media sites

VS

In support of real identity…

On the flip side, they feel **more comfortable** interacting with and have a **higher level of trust** in information from individuals whose **real identities** are shown.

72%
trust the opinions of individuals **who use their real names** over those who participate anonymously online

84%
would be **more likely to seek professional advice** online if they knew that **verifiable experts** were participating and could respond

What to do with this conundrum?

Introduce new levels of anonymity

On the new Sermo platform launching this summer, physicians will have even more flexibility to post and interact anonymously to increase the level of trust amongst our community.
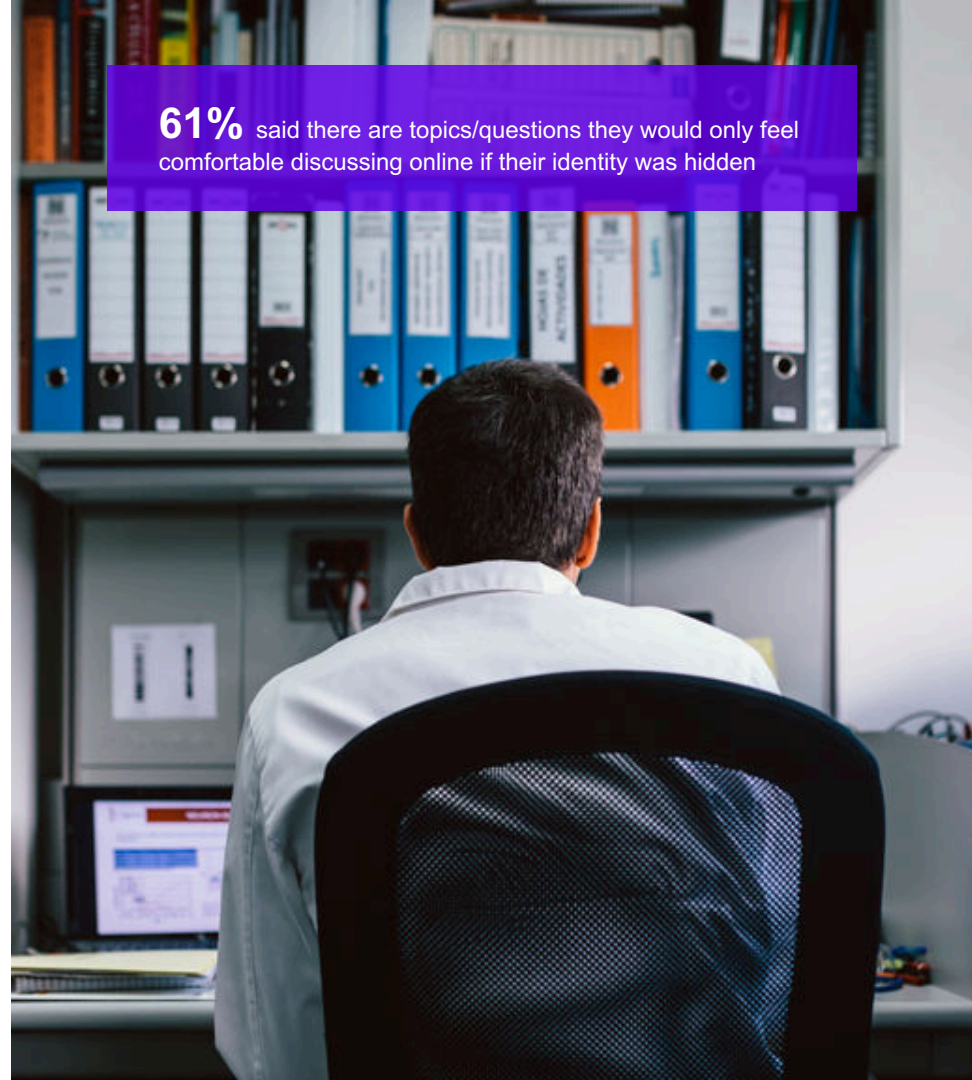
Use their real name OR a username on the platform

Ability to post fully anonymously for those sensitive subjects

61% said there are topics/questions they would only feel comfortable discussing online if their identity was hidden

Medical practice tools

How did so many patients get Google medical degrees?

How often do physicians have to **clear up misinformation** brought in by a patient who was **performing online searches** about their ailment/treatment?
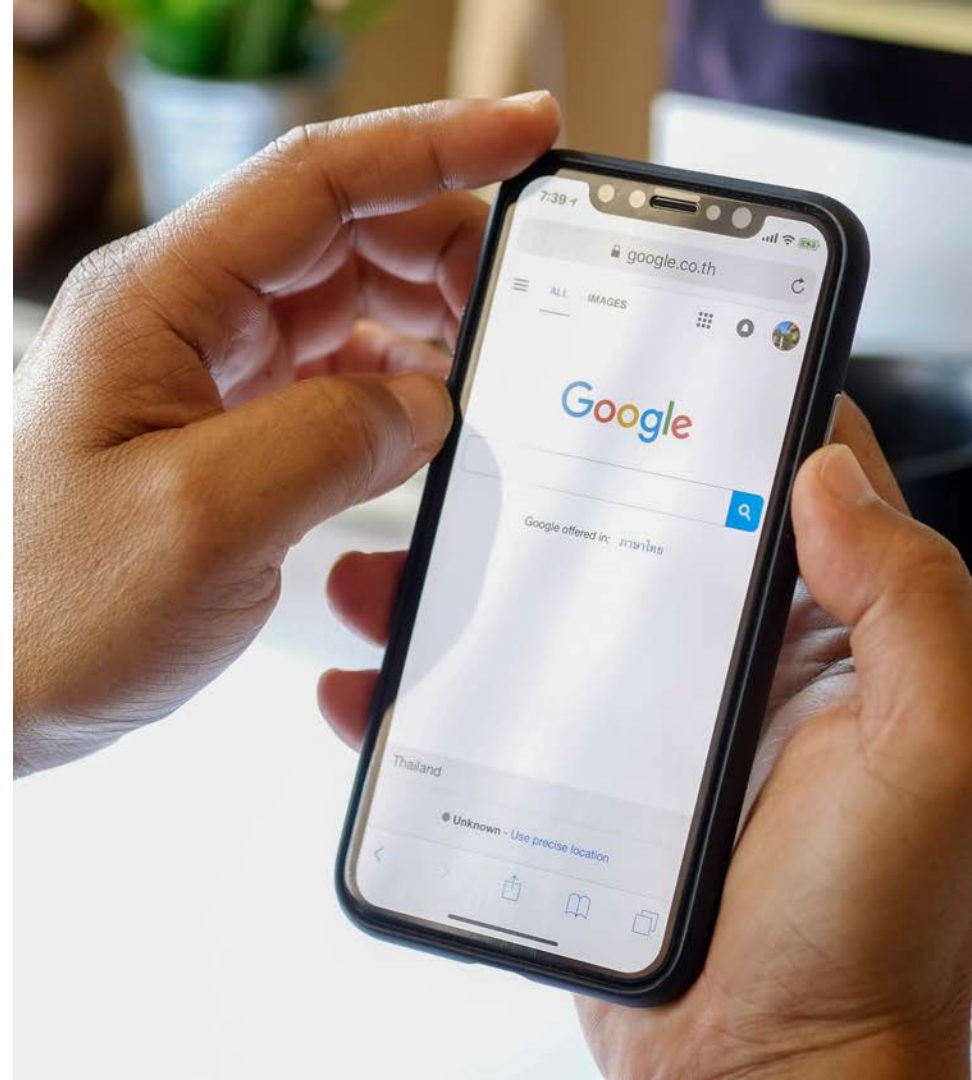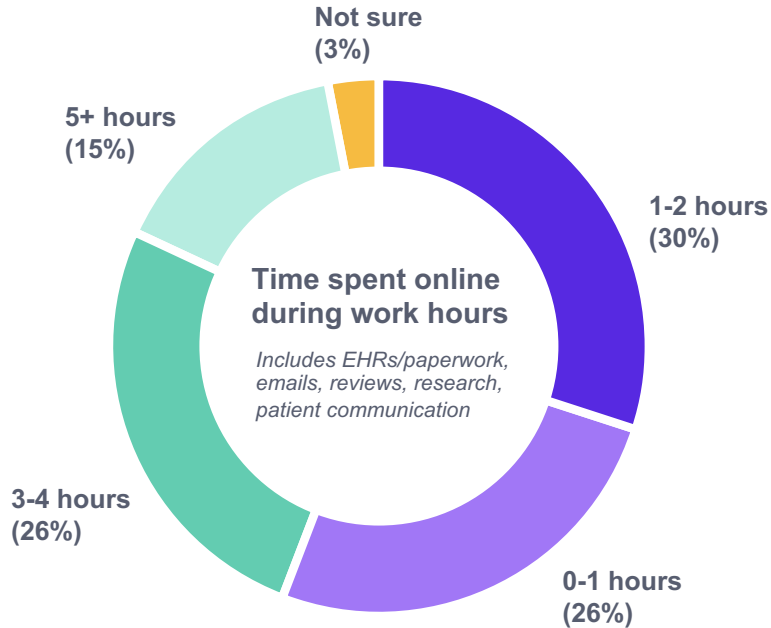
73%
Frequently

11%
Always

15%
Rarely

11%
Never

For the REAL experts:
physicians frequently leverage digital tools in their practice

Time spent online during work hours

Includes EHRs/paperwork, emails, reviews, research, patient communication

- Not sure (3%)
- 1-2 hours (30%)
- 0-1 hours (26%)
- 3-4 hours (26%)
- 5+ hours (15%)

Types of online tools leveraged during practice

→ Medical research support (61%)

→ EHR/patient portal (31%)

→ Secure text messaging (23%)

→ Telehealth (14%)

→ Crowdsourcing platforms (11%)

→ Other (5%)

What and where are physicians researching?

Digital properties most often visited for medical information

Twitter **Search/Google** Medscape
Elsevier **Medical journals, articles, & news**
SERMO AHA **Epocrates**
Portable medical diary
JAMA **Clinical guidelines** ADA
Mayo Clinic PubMed

Information physicians are looking for

→ Clinical trials (21%)

→ Physician reviews/opinions on medical treatment options (18%)

→ Condition management (17%)

→ Case studies/real world evidence (17%)

→ Diagnosis support (13%)

→ Prescribing information (12%)

→ Other (2%)

Proven value in the power of peer reviews

Sermo has the world's largest database of peer-to-peer drug ratings - over **750k** ratings

93% say peer-to-peer ratings and comments will **change their perception of a drug** in the future

75% have changed their perception of a drug after reading peer ratings and reviews

Drug Ratings, by doctors for doctors ✕

Change Drug

Rate Humira
Adalimumab

rheumatoid arthritis | Crohn's disease | hidradenitis suppurativa | psoriasis

polyarticular juvenile idiopathic arthritis | hidradenitis suppurativa

Indicate your overall preference for **Humira** over other brands for the treatment of **rheumatoid arthritis** ★★★★☆

Efficacy	★★★☆☆
Safety	★★★★☆
Tolerability	★★★★☆
Accessibility	★★★☆☆
Adherence	★★☆☆☆
Your combined rating	★★★★☆ 4.0

Very good biologic for inflammatory diseases due to autoimmunity like RA, and Psoriatic Arthritis, it is well tolerated and very effective, but very expensive and always need a Prior Auth from insurance.

Submit | I don't know this drug | Feedback

Connect in more meaningful ways online:
what HCPs want more of from pharma

What do you wish pharma companies would do more of online?

30%	**23%**	**19%**	**15%**	**12%**
Findings from medical congresses	**Case studies/real world evidence**	**CME**	**Diagnosis support**	**Educational videos**

What we discovered

To better engage HCPs and reach them with the content they're looking for:

Adapt engagement tactics to **meet HCP digital habits**

Social networking is a big part of a physician's daily life & source for medical information

Reach physicians with content that's **beneficial to their practice**

Move towards content written for physicians by physicians vs. solely brand promotions

Peer-to-peer reviews

Medical congress findings

Case studies

And finally, be more like **Dr. House**

(minus the pain meds)

Thank you

For more information on how you can leverage Sermo,
please visit sermo.com or email us at bizsolutions@sermo.com

SERMO