Understanding 2023 HCP Channel Trends & Preferences

Andrea Gaymon, M.Ed., UXC,
Chief Product Officer, Healio

Brian Cunningham, SVP,
Group Media Lead, CMI Media Group

Survey Methodology

- Responses collected over 3 weeks in August 2023

- Distributed to all U.S. Physicians, Residents, PAs (cross-specialty)

- **996 HCP** respondents met eligibility criteria of actively being involved in patient care

- Total Responses n = 1309; **"eligible"** n **= 996**
 - Of the 996 responders, 680 treat Diabetes/Metabolic Disorders

Primary use of social media as a healthcare provider

*"I mostly CONSUME clinical content, education, or professional resources on this platform"*

"I mostly CREATE clinical content, education, or professional resources on this platform"

PLATFORM	% RESPONDERS (COUNT)
YouTube	48% (464)
LinkedIn	37% (359)
Facebook	26% (252)
Instagram	18% (173)
Twitter (Now "X")	16% (154)
Reddit	12% (114)
Threads	10% (93)
TikTok	7% (69)
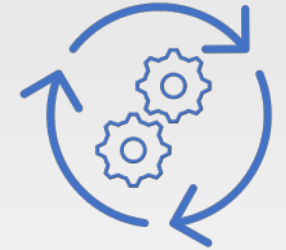
PLATFORM	% RESPONDERS (COUNT)
LinkedIn	4% (37)
Instagram	4% (36)
Facebook	3% (30)
YouTube	3% (26)
Twitter (Now "X")	2% (21)
Threads	2% (17)
TikTok	1% (14)
Reddit	1% (10)

How do you typically prefer to engage with peer-led content?
(i.e., education and resources provided by other HCP experts) ***[Select all that apply]***
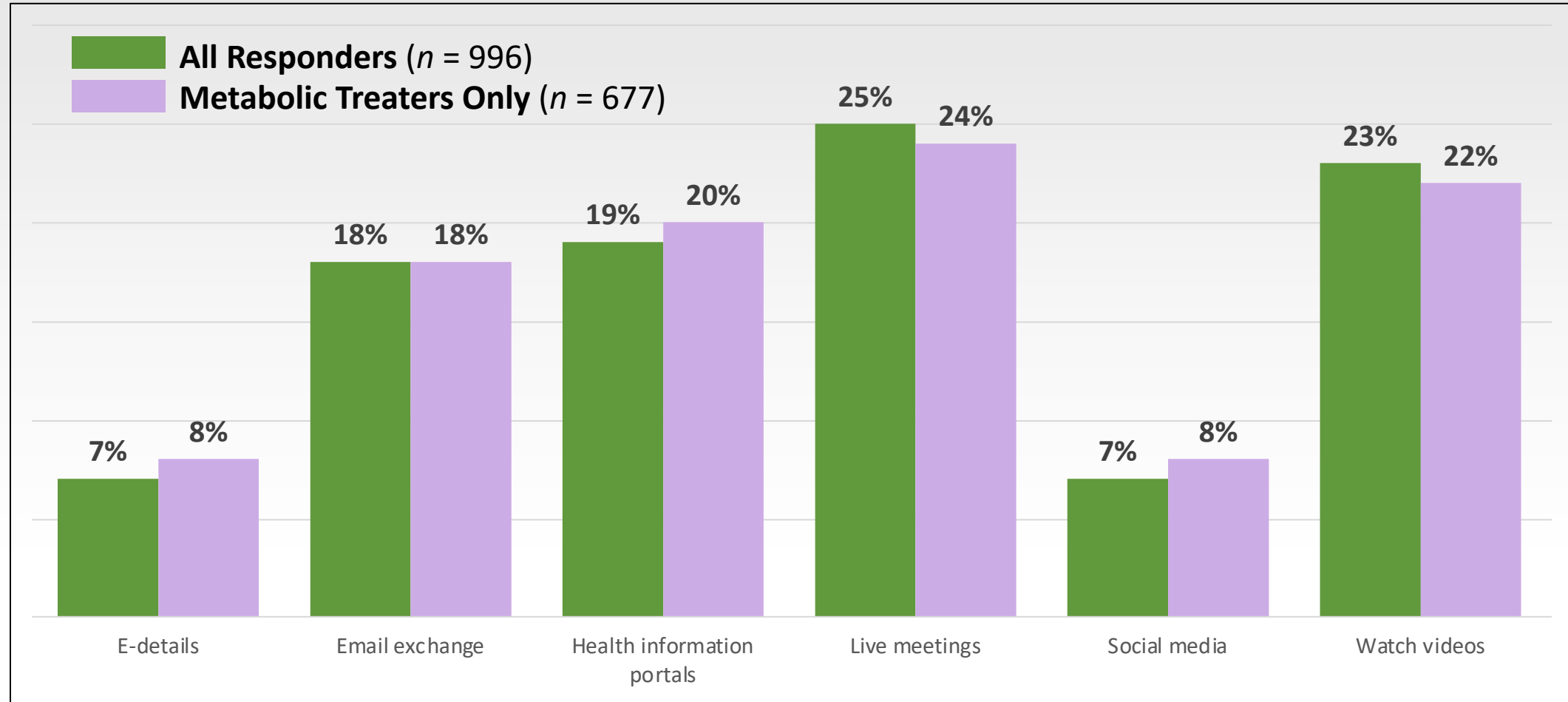
Average frequency with which HCPs use each source to receive information about new medical products, treatments, and therapies

Frequently

PLATFORM	% RESPONDERS (COUNT)
Medscape	33% (319)
Healio	20% (194)
Epocrates	19% (191)
Doximity	18% (181)
Clinical Updates	16% (154)
MedPage Today	12% (121)
Medical News Today	10% (96)
Elsevier – Practice Update	9% (86)
Clinical Key (formerly MD Consult)	7% (72)
BioPharm/ClinTopics	7% (59)
Physician's Weekly	6% (55)
ReachMD	4% (41)

Sometimes

PLATFORM	% RESPONDERS (COUNT)
Medscape	40% (389)
Doximity	39% (387)
Clinical Updates	37% (367)
Healio	33% (324)
Clinical Key (formerly MD Consult)	32% (312)
Elsevier – Practice Update	32% (295)
BioPharm/ClinTopics	28% (274)
MedPage Today	27% (226)
Epocrates	27% (260)
Medical News Today	24% (237)
Physician's Weekly	20% (191)
ReachMD	19% (191)

Rarely

PLATFORM	% RESPONDERS (COUNT)
Clinical Key (formerly MD Consult)	27% (269)
Medical News Today	27% (265)
Elsevier – Practice Update	27% (258)
Physician's Weekly	27% (258)
ReachMD	26% (254)
BioPharm/ClinTopics	25% (245)
Doximity	24% (231)
Epocrates	24% (231)
MedPage Today	23% (226)
Healio	22% (217)
Clinical Updates	20% (193)
Medscape	19% (188)

Never

PLATFORM	% RESPONDERS (COUNT)
ReachMD	50% (489)
Physician's Weekly	48% (469)
BioPharm/ClinTopics	41% (405)
Medical News Today	38% (370)
MedPage Today	37% (362)
Elsevier – Practice Update	34% (330)
Clinical Key (formerly MD Consult)	33% (326)
Epocrates	30% (298)
Clinical Updates	27% (266)
Healio	25% (247)
Doximity	18% (181)
Medscape	9% (85)

Please indicate (to your best estimate) what percentage of your time is spent using each learning format below

Overall Medical Education

ITEM	AVG % TIME (ALL RESPONDERS)	AVG % TIME (METABOLIC TREATERS ONLY)
Learning by **reading online/digital text**	**35%**	**35%**
Learning by listening to a **live person** (sales rep, speaker, panel, etc.)	17%	17%
Learning by **watching video content**	17%	17%
Learning through **traditional/analog content** (print medical journals, etc.)	16%	15%
Learning via **audio digital content**	16%	18%

Pharmaceutical and Rx Treatment Education

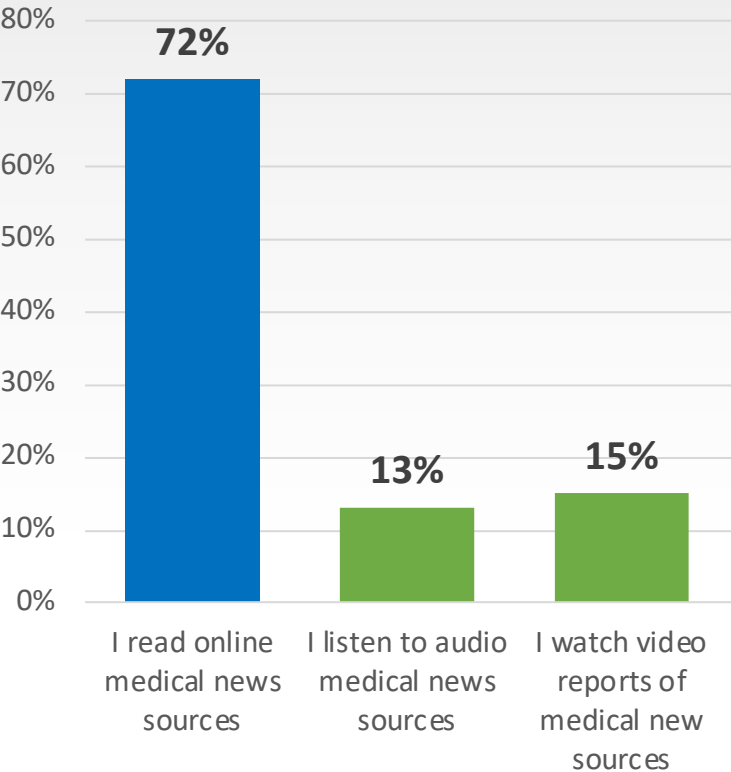| ITEM	AVG % TIME (ALL RESPONDERS)	AVG % TIME (METABOLIC TREATERS ONLY)
Learning by **reading online/digital text**	**42%**	**40%**
Learning through **traditional/analog content** (print medical journals, etc.)	19%	18%
Learning by listening to a **live person** (sales rep, speaker, panel, etc.)	18%	18%
Learning by **watching video content**	12%	13%
Learning via **audio digital content**	9%	10%

Please indicate the frequency with which you have used each of the following DIGITAL RESOURCES for medical education.

Higher frequency

RESOURCE	Daily	Weekly		Monthly	Few times a year	Never
Medical news sources (online)	23%	35%	= 58%	19%	13%	10%
Mobile apps	29%	26%	= 55%	17%	13%	15%
Online gated healthcare worker social communities (e.g., Doximity)	12%	34%	= 46%	22%	13%	19%
Tools within my EHR platform	19%	22%	= 41%	15%	16%	28%
Case studies (online)	6%	25%	= 31%	27%	29%	13%
Quizzes/Knowledge Tests (online)	6%	24%	= 30%	27%	26%	17%
Podcasts	7%	19%	= 26%	23%	23%	28%
Public social platforms (e.g., Facebook)	11%	12%	= 23%	12%	13%	52%
Expert/KOL presentations or discussions (online)	3%	14%	= 17%	26%	33%	24%
Tools from pharmaceutical manufacturers (online)	3%	13%	= 16%	20%	30%	34%
Guided anatomy visuals	2%	11%	= 13%	14%	29%	44%

How Physicians Consume the Following Digital Content
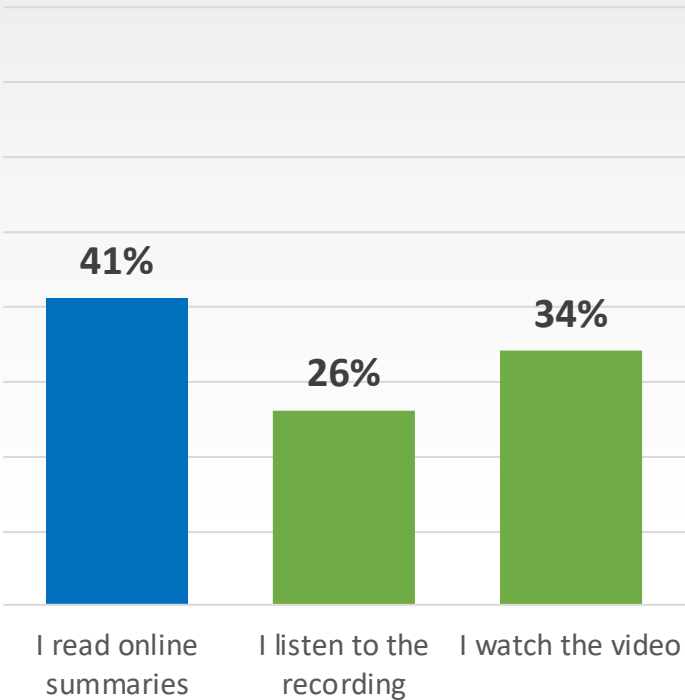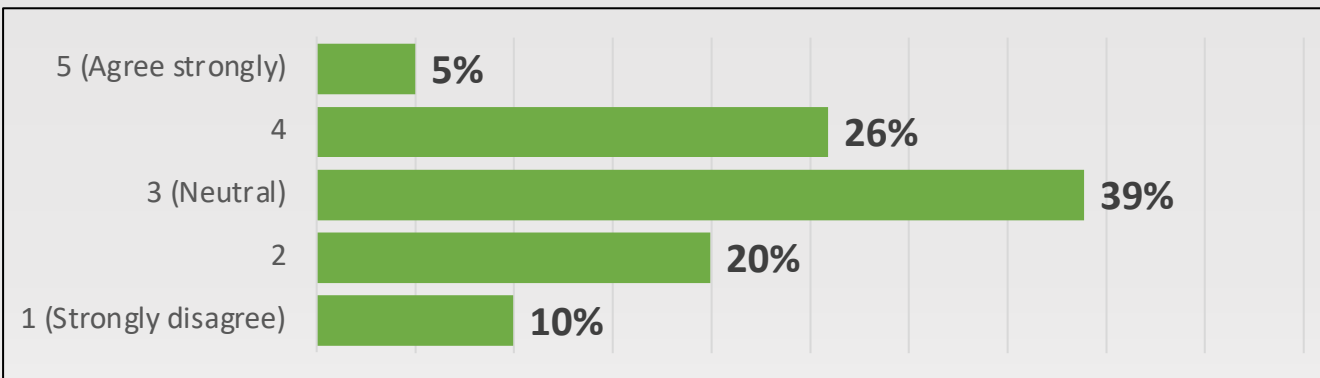
HCPs
Perceptions
of Pharma

Tools **MOST USED** from a Pharmaceutical Manufacturer

*"Pharma companies do a good job of **delivering relevant content** that I need as a physician."*

Rating	Percentage
5 (Agree strongly)	5%
4	26%
3 (Neutral)	39%
2	20%
1 (Strongly disagree)	10%

*"I feel that pharma companies really **understand me as a physician."***

Rating	Percentage
5 (Agree strongly)	3%
4	14%
3 (Neutral)	43%
2	24%
1 (Strongly disagree)	16%
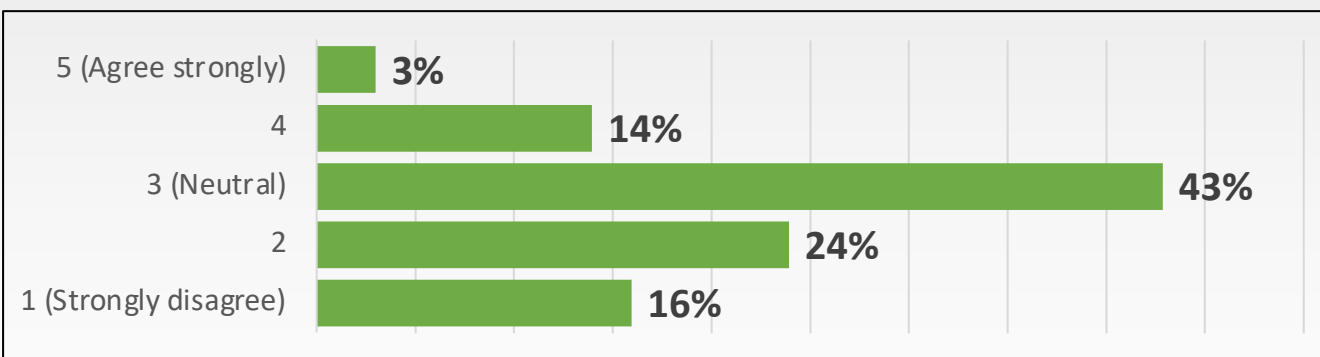
*"Pharma companies currently **communicate with me in a relevant and personalized manner."***
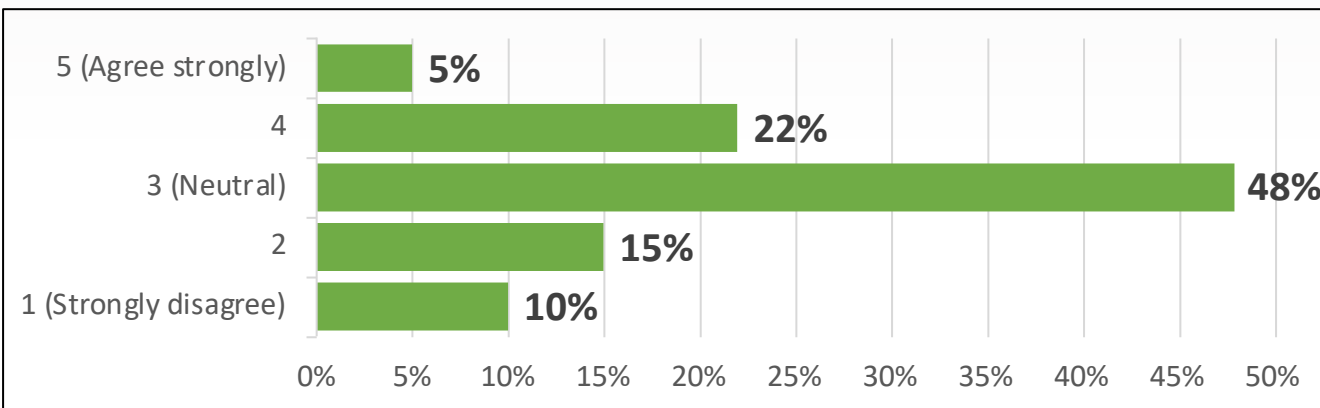
Rating	Percentage
5 (Agree strongly)	5%
4	22%
3 (Neutral)	48%
2	15%
1 (Strongly disagree)	10%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%

*"As a physician, I want to **interact with pharma companies.**"*

5 (Agree strongly)	9%
4	23%
3 (Neutral)	35%
2	17%
1 (Strongly disagree)	16%

*"I feel that **pharma helps me** to perform my job more efficiently."*

5 (Agree strongly)	6%
4	25%
3 (Neutral)	36%
2	19%
1 (Strongly disagree)	14%

*"Overall, I feel satisfied with pharma's messaging **targeting physicians** (only)."*

5 (Agree strongly)	5%
4	25%
3 (Neutral)	38%
2	19%
1 (Strongly disagree)	13%
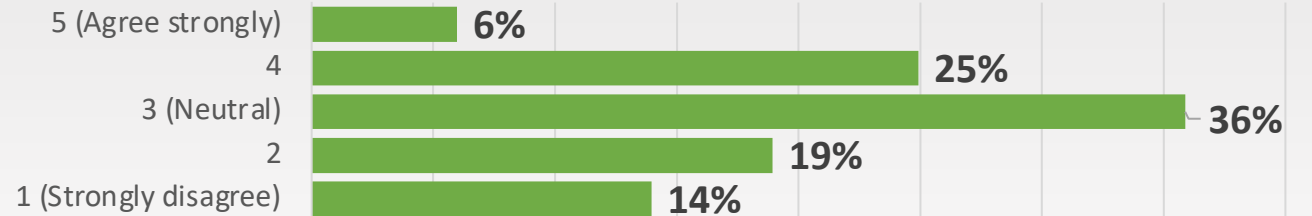
*"Overall, I feel satisfied with pharma messaging **targeting the general public** (only)."*
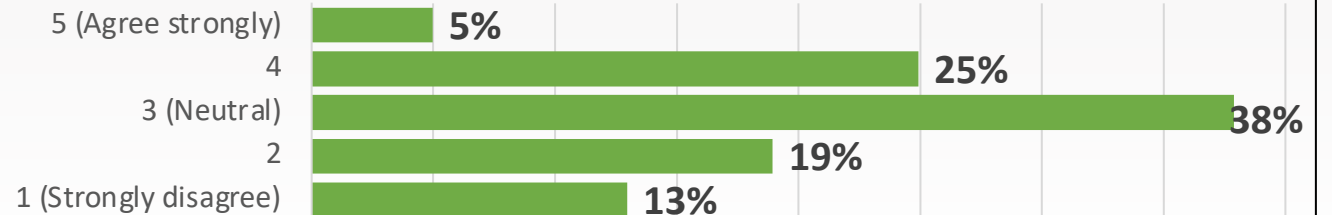
5 (Agree strongly)	4%
4	14%
3 (Neutral)	32%
2	23%
1 (Strongly disagree)	28%
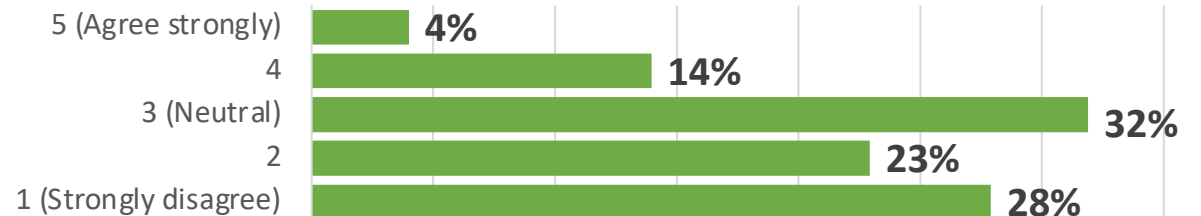
Overall HCP Perceptions of Pharma
(1 = Strongly Disagree; 5 = Agree Strongly)

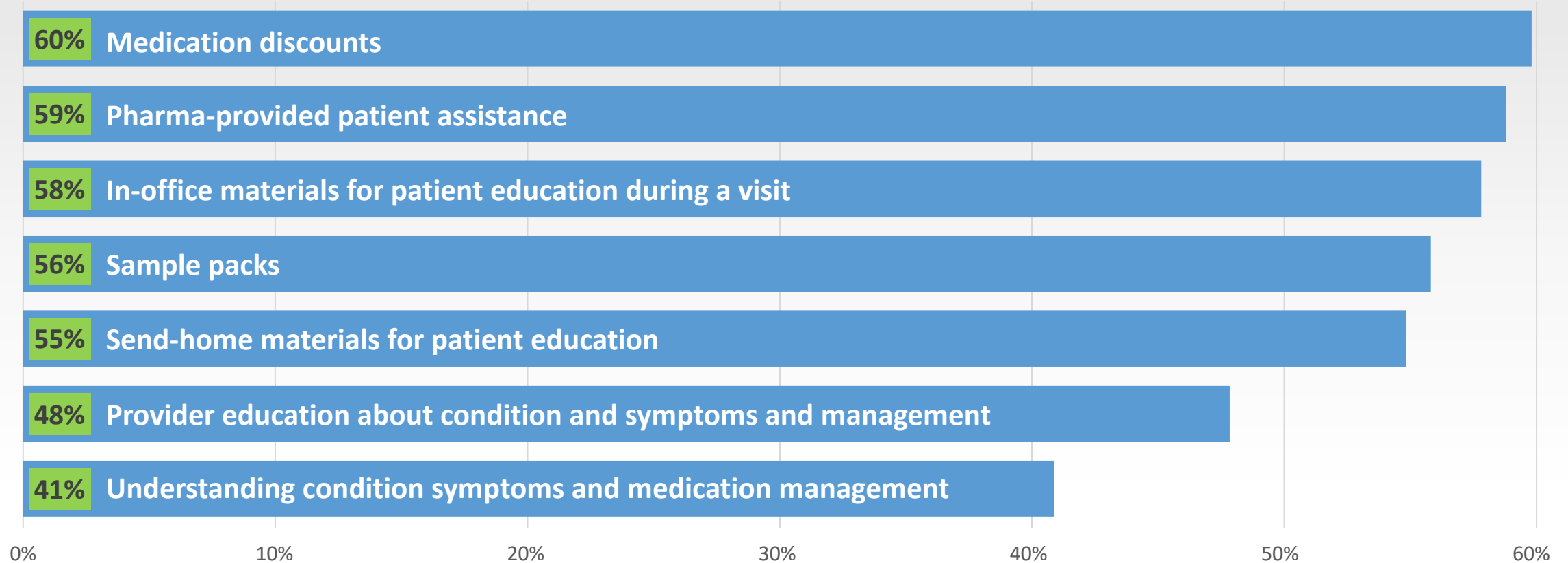| Questions	Avg Rating (ALL RESPONDERS)		2023 Avg Rating (METABOLIC TREATERS) n=680
	2023 (*n*=996)	**2022** (*n*=988)	
Pharma companies do a good job of delivering relevant content that I need	2.97	2.86	2.92
Pharma companies currently communicate with physicians in a relevant and personalized manner.	2.97	2.84	2.64
As a physician, I want to interact with pharma companies.	2.92		2.94
Overall, I feel satisfied with pharma's messaging targeting physicians.	2.91		2.87
I feel that pharma helps me to perform my job more efficiently.	2.90		2.95
I feel that pharma companies really understand me as a physician.	2.64	2.55	2.91
Overall, I feel satisfied with pharma messaging targeting the general public.	2.44		2.47

As a healthcare provider, what do you need from pharma in order to communicate effectively with your patients? **[SELECT ALL THAT APPLY]**

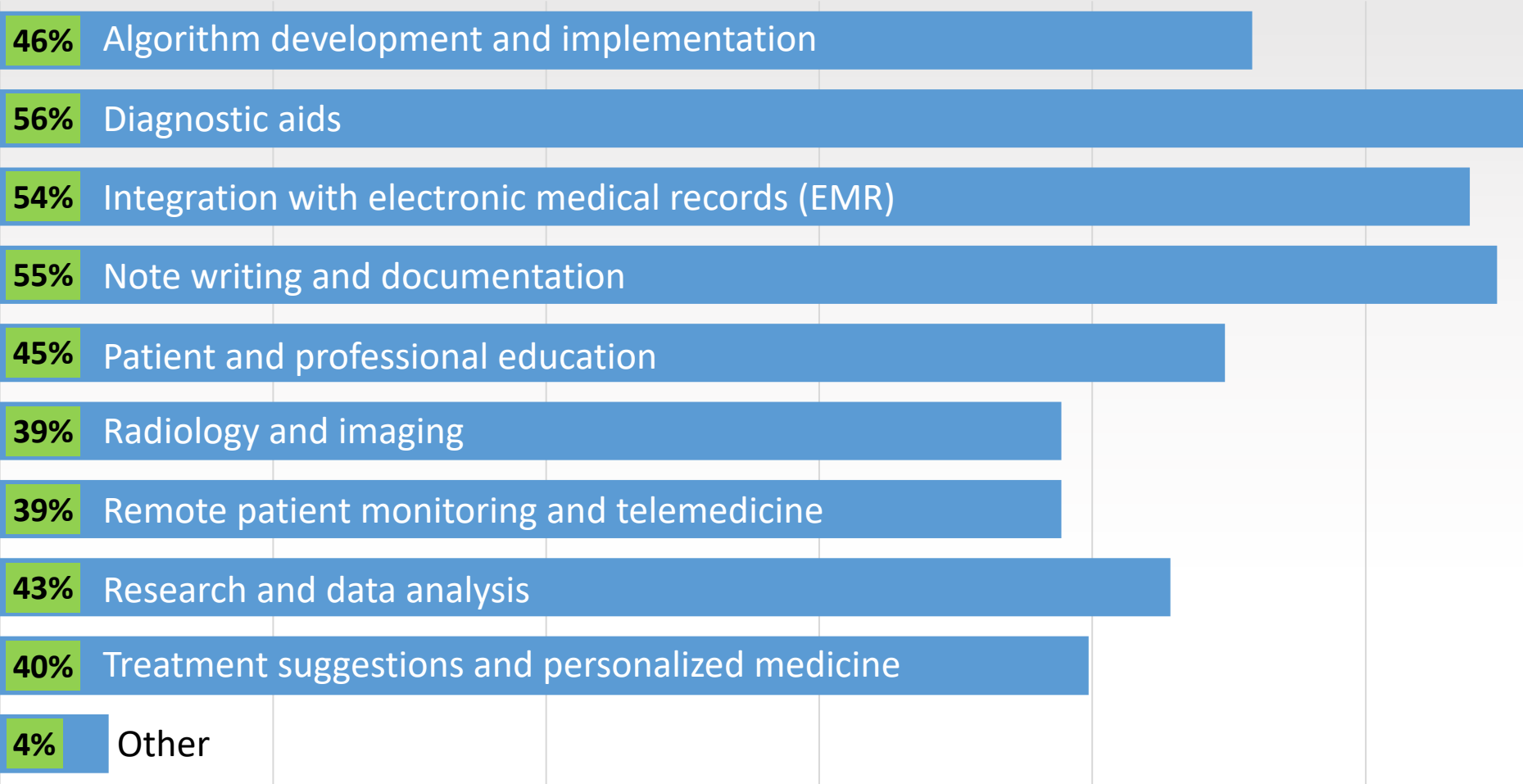| Percentage	Response
60%	Medication discounts
59%	Pharma-provided patient assistance
58%	In-office materials for patient education during a visit
56%	Sample packs
55%	Send-home materials for patient education
48%	Provider education about condition and symptoms and management
41%	Understanding condition symptoms and medication management

How do you **envision using AI tools** to support your practice over the next 12 months? *[SELECT ALL THAT APPLY]"*

Time Saver?

46%	Algorithm development and implementation
56%	Diagnostic aids
54%	Integration with electronic medical records (EMR)
55%	Note writing and documentation
45%	Patient and professional education
39%	Radiology and imaging
39%	Remote patient monitoring and telemedicine
43%	Research and data analysis
40%	Treatment suggestions and personalized medicine
4%	Other

Key Takeaways

- Understanding channel preferences of your specific HCP audience key to an Omnichannel targeting approach

- Have an eP2P strategy as virtual channels just as important to HCP learning as live meetings

- Audio/Video a growing digital medium for HCPs learning, however physicians still prefer to read online

- Content personalization is slowly helping pharma improve perception and increase engagement among HCPs

- Pharma has an opportunity to support physician's needs through better patient education materials, samples, patient assistance