

Understanding 2023 HCP Channel Trends & Preferences



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Survey Methodology

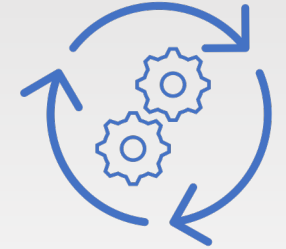
- Responses collected over 3 weeks in August 2023
- Distributed to all U.S. Physicians, Residents, PAs (cross-specialty)
- **996 HCP** respondents met eligibility criteria of actively being involved in patient care
- Total Responses $n = 1309$; **“eligible” $n = 996$**
 - Of the 996 responders, 680 treat Diabetes/Metabolic Disorders

Primary use of social media as a healthcare provider



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

| 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) |

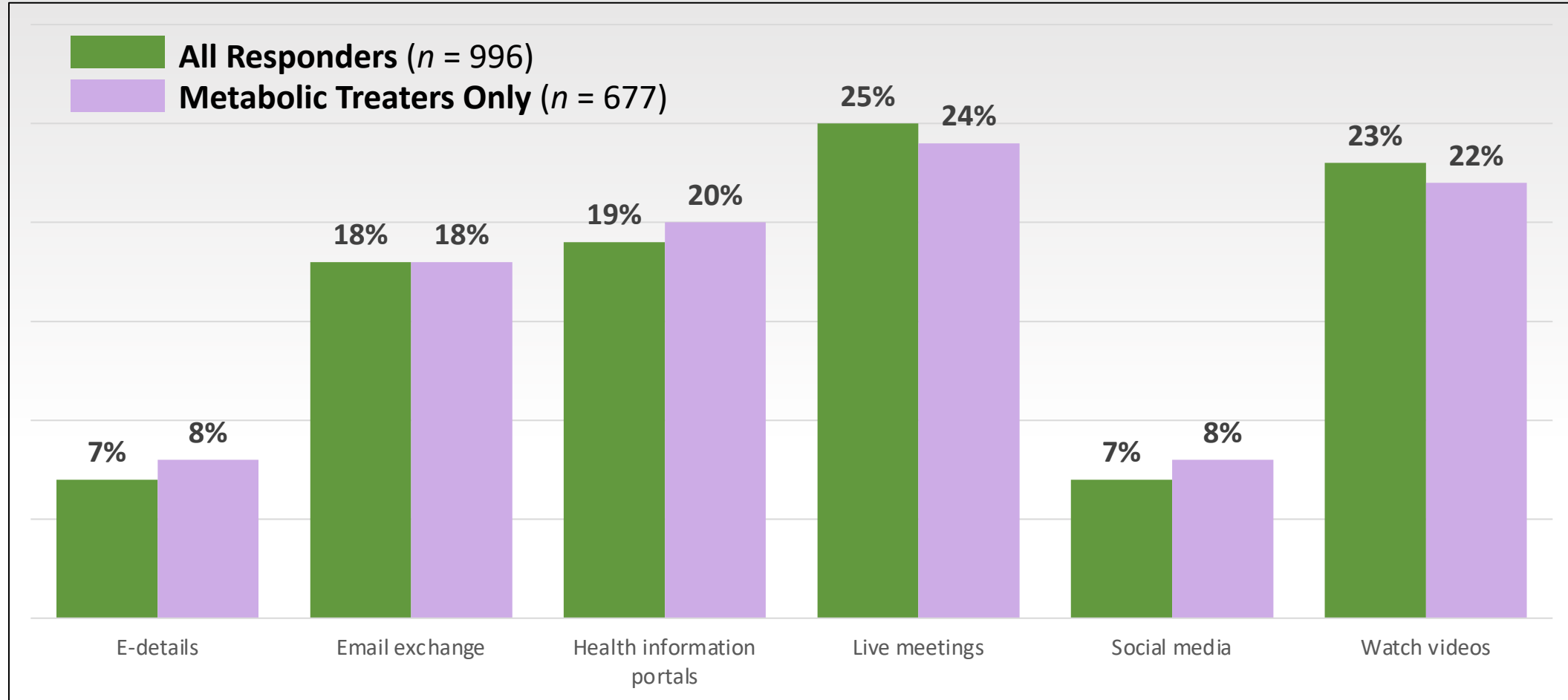


*“I mostly **CREATE** clinical content, education, or professional resources on this platform”*

| 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.

| RESOURCE | Higher frequency | | =  | Monthly | Few times a year | Never |
|--|------------------|--------|---|---------|------------------|-------|
| | Daily | Weekly | | | | |
| 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



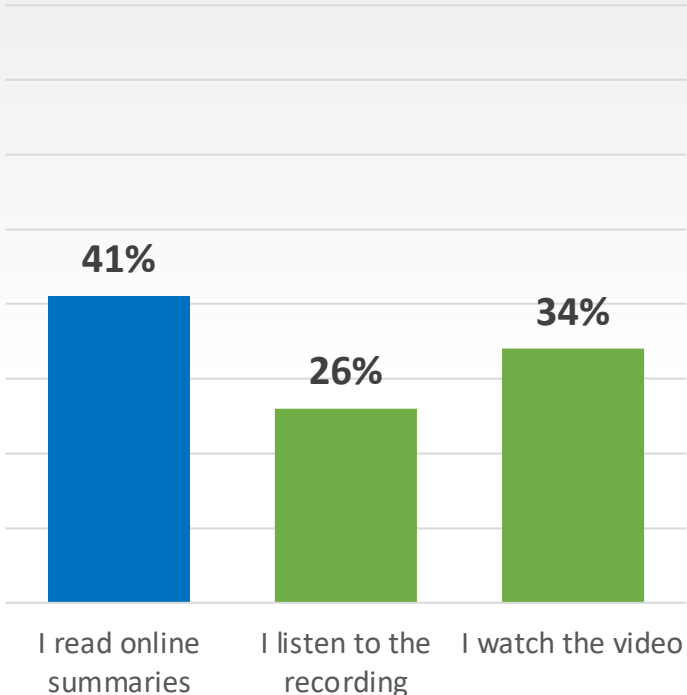
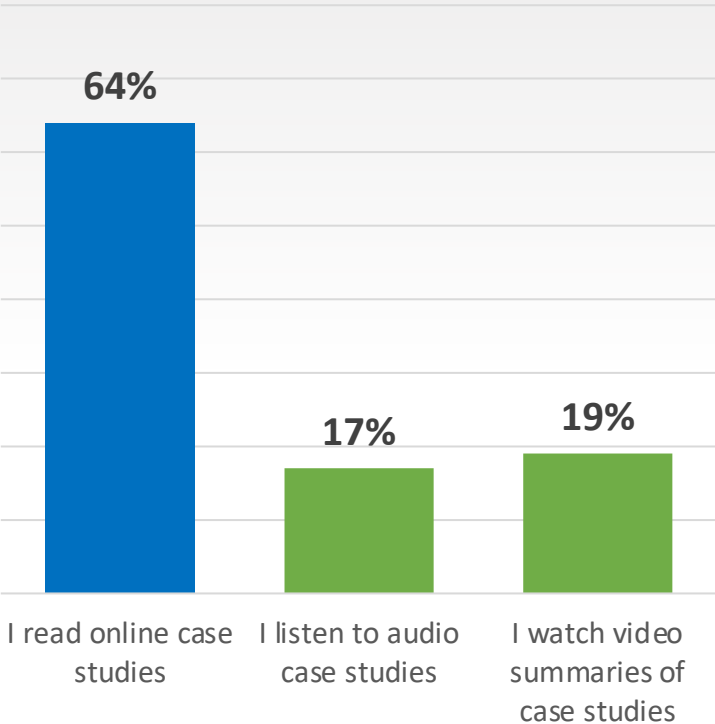
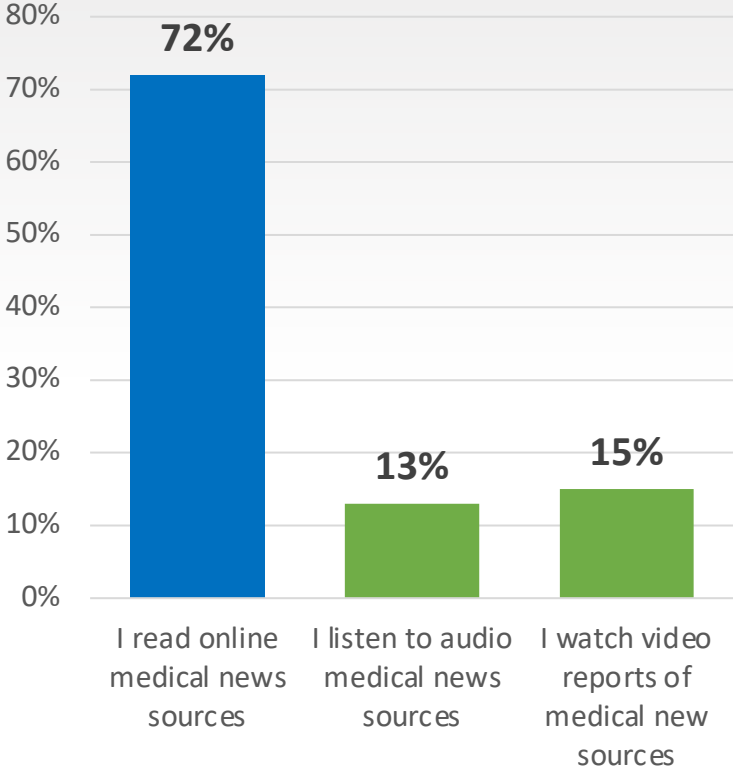
Medical news sources



Case studies



Expert/KOL presentations or discussions

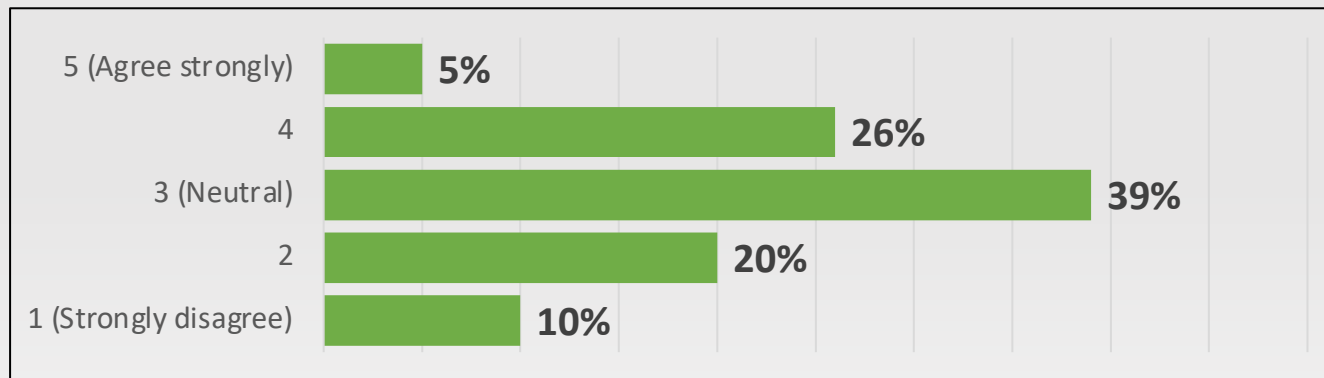


HCPs Perceptions of Pharma

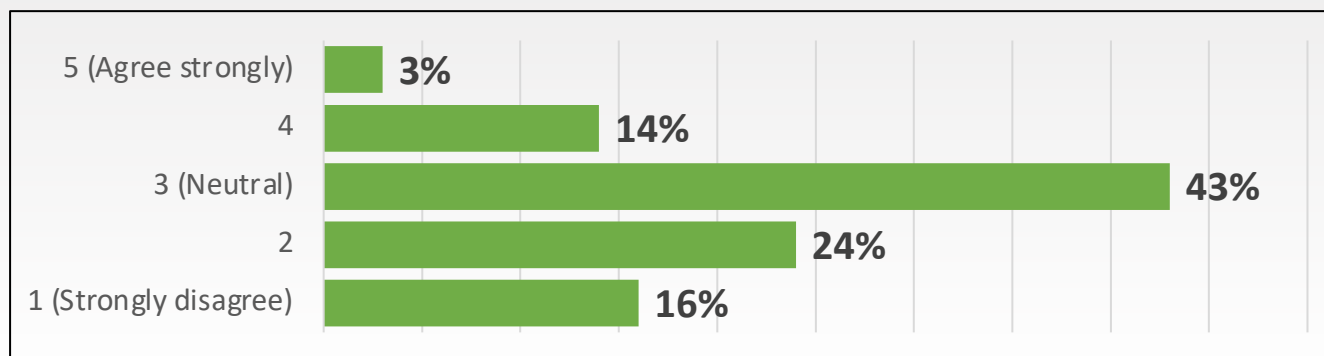




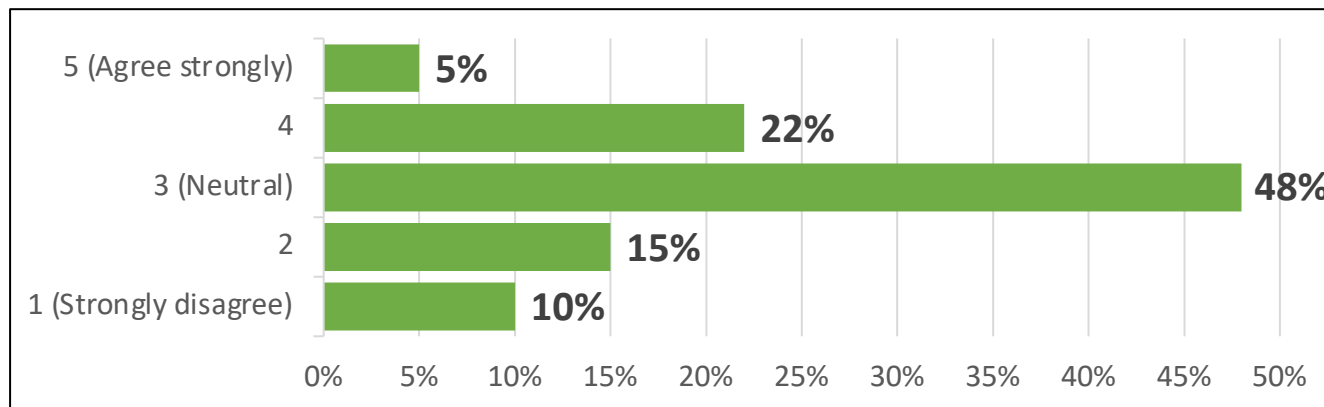
*“Pharma companies do a good job of **delivering relevant content** that I need as a physician.”*



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

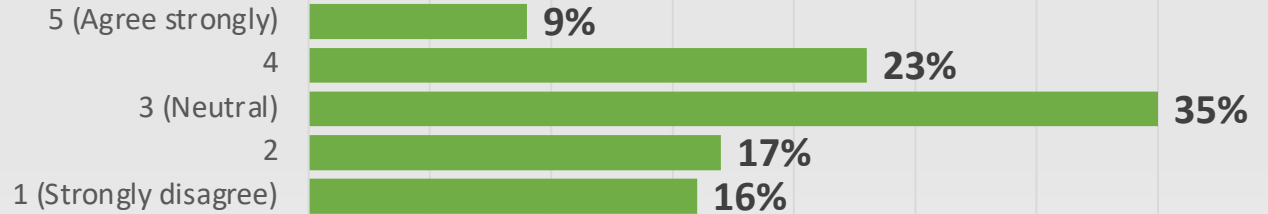


*“Pharma companies currently **communicate with me in a relevant and personalized manner.**”*

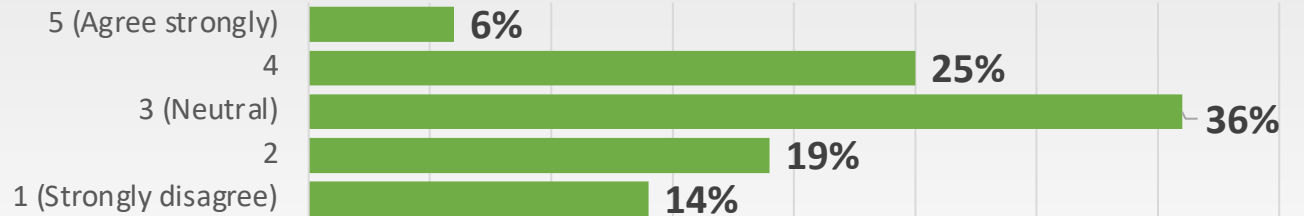




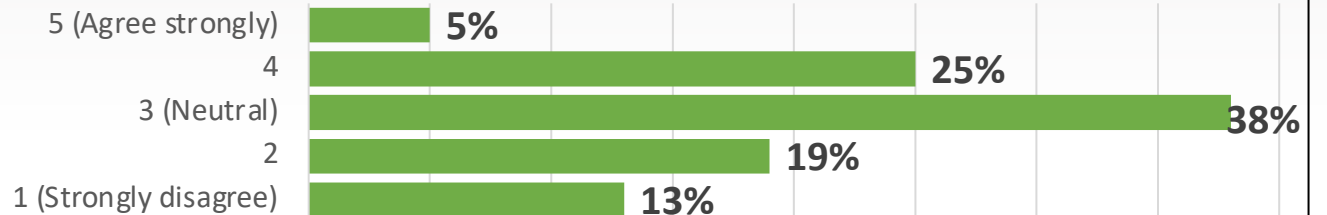
*“As a physician, I want to **interact with pharma companies.**”*



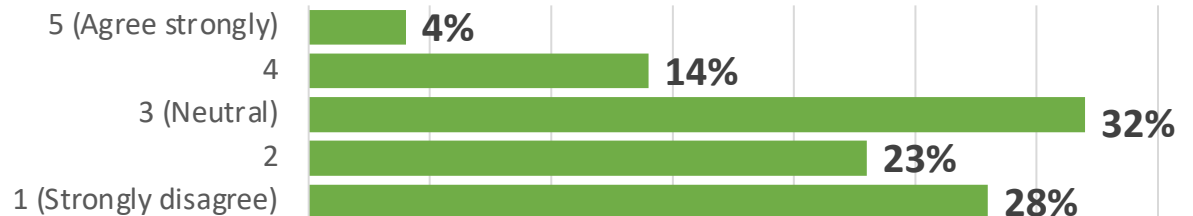
*“I feel that **pharma helps me to perform my job more efficiently.**”*



*“Overall, I feel satisfied with pharma’s messaging **targeting physicians (only).**”*



*“Overall, I feel satisfied with pharma messaging **targeting the general public (only).**”*

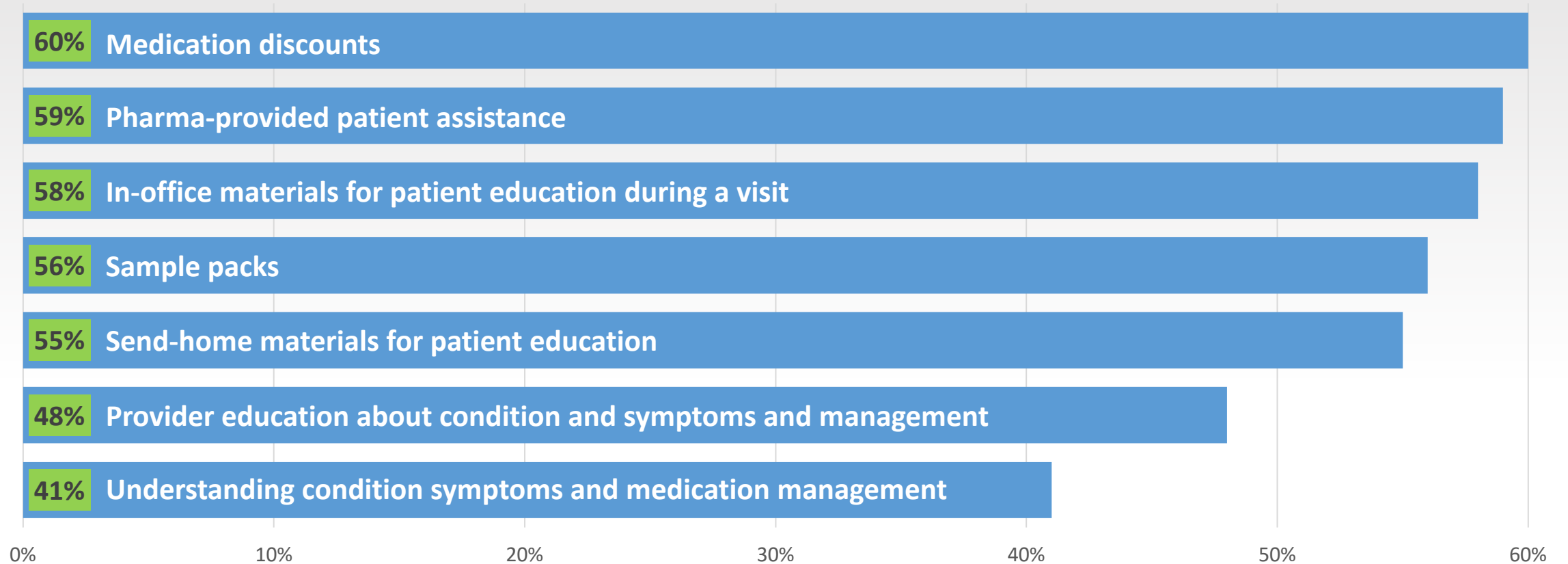


Overall HCP Perceptions of Pharma

(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 |

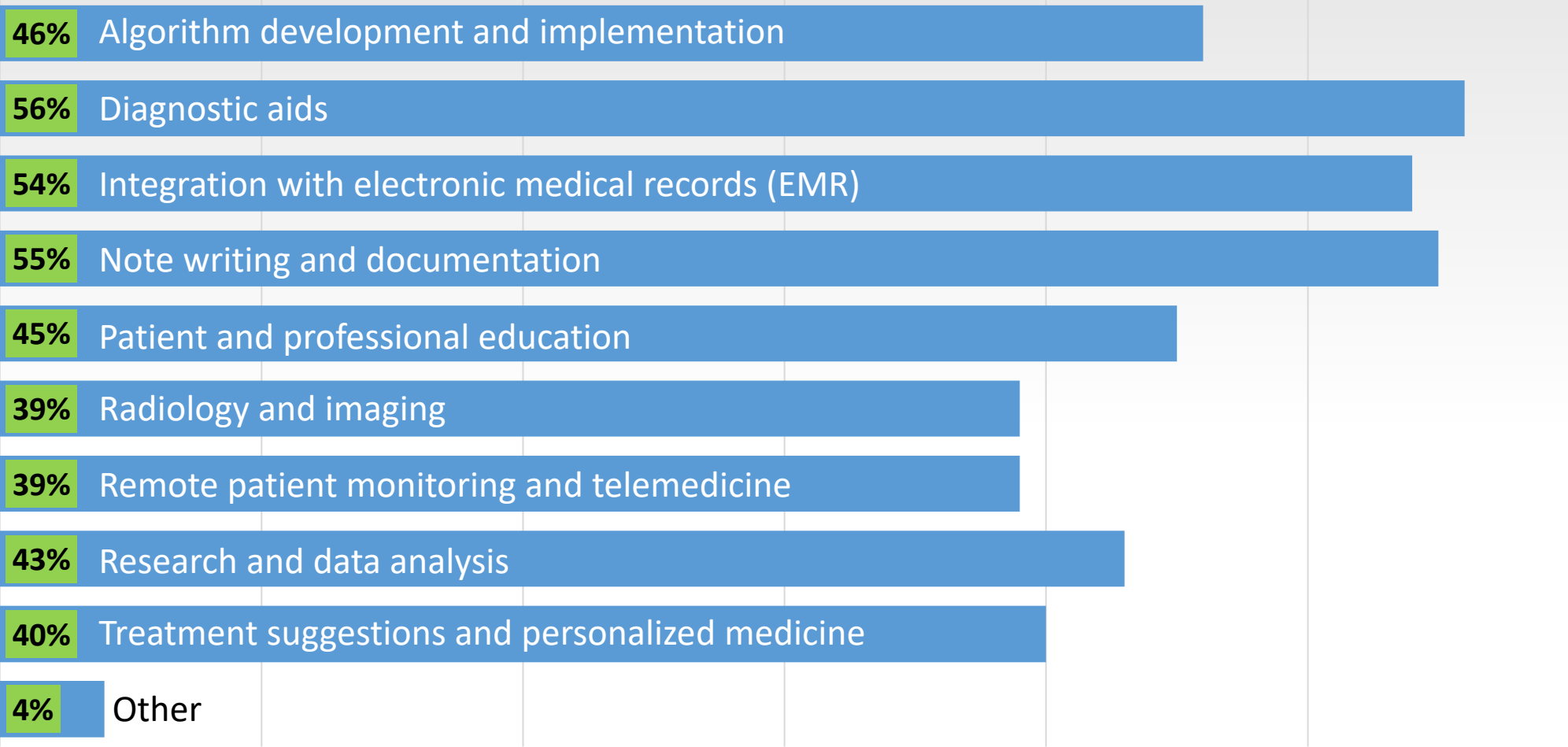
As a healthcare provider, what do you need from pharma in order to communicate effectively with your patients? [SELECT ALL THAT APPLY]



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



Time
Saver?



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