

A woman with dark curly hair, wearing blue scrubs, is shown in profile, looking at a computer monitor. The monitor displays a software interface with various data points and charts. The background is slightly blurred, showing a clinical or office environment with a window and some papers on the desk.

H C P D i g i t a l T r e n d s

Voice of the Customer

A Study by DHC and Healio

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HCP Digital Trends

Topics Covered

1. Learning Needs
2. Pharma Content and Cx
3. AI and Medicine
4. Burnout and Wellness



Clinical Learning Preferences

% of time for education and learning



✓ **37%** of time reading online

✓ **18%** watching video

✓ **16% print (journals)**

Younger physicians (under 40) were significantly LESS likely to use print

✓ **16% live person**
(rep, speaker, panel)

Younger physicians (under 40) were significantly LESS likely to use live person

✓ **12% digital audio**

Younger physicians (under 40) were significantly MORE likely to use digital audio



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The screenshot shows a Google search for "shingrix vaccine". At the top, the Google logo and search bar are visible. Below the search bar, there are navigation links for "All", "Images", "Shopping", "News", "Videos", "Forums", "Web", "More", and "Tools".

The main content area features an "AI Overview" section. It starts with a "Search Labs | AI Overview" header. The text reads: "The Shingrix vaccine is a recombinant zoster vaccine that helps prevent shingles (herpes zoster). It's recommended for adults who meet the following criteria:"

- Age: Adults 50 years and older
- Immunocompromised status: Adults 19 years and older who have a weakened immune system due to disease or therapy

Below the list, it states: "The Shingrix vaccine is administered as a two-dose series, with the second dose given 2 to 6 months after the first. Both doses are required for full protection."

Underneath this is a table with the title "Shingrix vaccine":

How it works	Stimulates the immune system to generate a strong and sustained immune response
Side effects	Pain, redness, and swelling at the injection site, muscle pain, tiredness, headache, shivering, fever, upset stomach

To the right of the AI overview, there are search results. The first result is "Shingles Vaccine | SHINGRIX (Zoster Vaccine Recombinant, Adjuvanted)" from Shingrix. The second result is "Shingles Vaccination - CDC" dated Jul 19, 2024, from the CDC. The third result is "SHINGRIX (Zoster Vaccine Recombinant, Adjuvanted) for HCPs" from shingrixhcp.com.

Importance of Personalized Content (for HCP) from Pharma ... *56% Agree*

✓ 22% ... **Strongly Agree (9/10)**

✓ 34% **Agree (6/7/8)**

✓ 24% **Neutral(5)**

✓ 20% **Disagree (1/2/3/4)**

Younger physicians (under 40) were significantly MORE likely to say personalized content is important

"...If the content is irrelevant to me, I will not read it"

Sentiment Among Some Older Physicians ...

"I find personalized content intrusive"

Pharma Requests for Feedback from Physicians ... *Not Happening for Half*

- ✓ 49% ... "They Do Not Ask for My Feedback"
- ✓ 12% Annually/ Biannually
- ✓ 21% Quarterly
- ✓ 15% Monthly
- ✓ 4% Weekly



I Am Satisfied with Pharma Messaging to My Patients

✓ 20% Agree

✓ 31% Neutral

✓ **50% Disagree**

Younger physicians (under 40) were significantly MORE likely to say they are satisfied with pharma messaging to patients

Pharma Helps My Patients Manage Their Health More Efficiently

✓ 20% Agree

✓ 34% Neutral

✓ **46% Disagree**

Younger physicians (under 40) were significantly MORE likely to say pharma helps patients manage health more efficiently

Pharma Understands My Patients as an Audience

- ✓ 23% Agree
- ✓ 37% Neutral
- ✓ **41% Disagree**

Younger physicians (under 40) were significantly MORE likely to say pharma understands their patients as an audience

Pharma Delivers Relevant Content That My Patients Need

✓ 24% Agree

✓ 39% Neutral

✓ **38% Disagree**

Younger physicians (under 40) were significantly MORE likely to say pharma delivers relevant content patients need

'Pfizer for All' consumer platform aims to provide post-Covid boost

Drugmaker follows Eli Lilly in cutting out middlemen and selling directly to patients




LillyDirect® helps bring the components of healthcare together

We can help you find a doctor, navigate the healthcare system, potentially lower your costs, and get medications delivered directly to you.

Select a condition:

- Diabetes
- Migraine
- Obesity

For US Healthcare Professionals Patient Populations ▾ Prescribing Information GSK MedInfo Visit US Patient Site Order SHINGRIX

**SHINGRIX**
(ZOSTER VACCINE RECOMBINANT, ADJUVANTED)

Search 🔍

CDC RECOMMENDATIONS WHO TO VACCINATE ▾ EFFICACY & SAFETY ▾ IN YOUR PRACTICE ▾ RESOURCE LIBRARY ▾

On-Demand Videos

Use these video resources to help prepare for discussions with your patients and to learn more about SHINGRIX.

- All
- Physician & Staff
- Pharmacist



This site is intended for U.S. healthcare professionals.

PfizerPRO



Samples Ordering*

Request Samples



Co-Pay Cards*

View Available Offers



HCP & Patient Materials

Order Materials

HCP Digital Trends

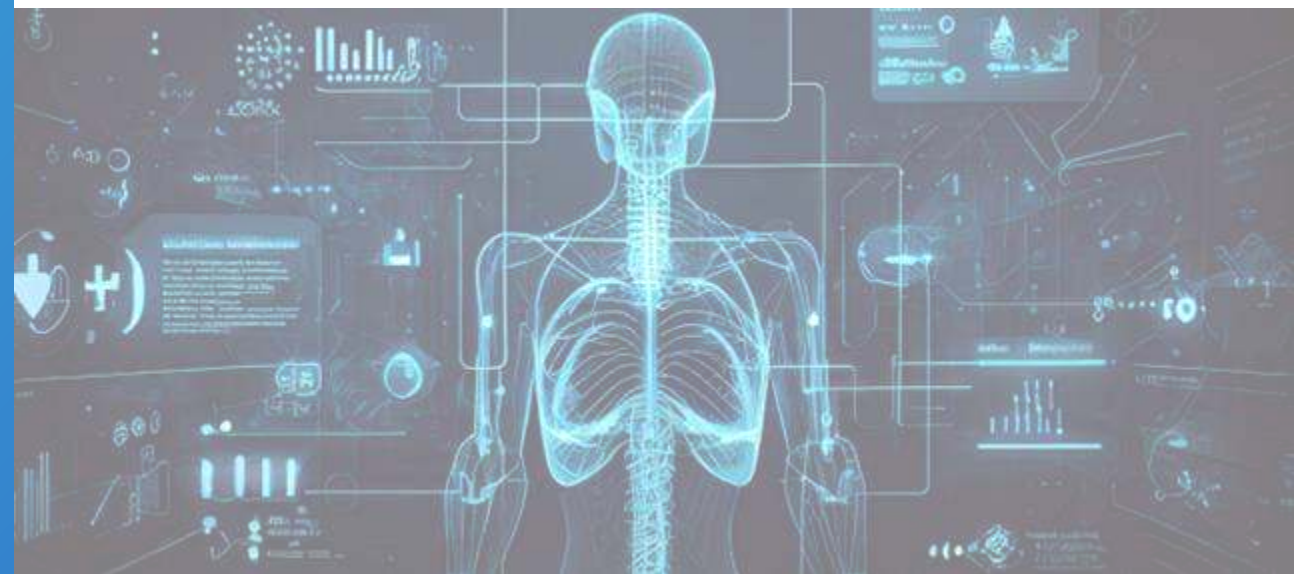
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Current Use of AI for Clinical Purposes

... Most Physicians Have Experience

✓ 77% Yes

✓ 23% No



Interest in Being Involved in the Development of AI Clinical Tools

✓ **51% Yes**

✓ **49% No**

Younger physicians (under 40) were significantly MORE likely – almost twice as likely - to say they want to be involved in the development of AI for medicine

I Have Concerns about Safety and AI

✓ **64% Agree**

✓ 22% Neutral

✓ 13% Disagree

I Have Concerns about Privacy and AI

✓ **62% Agree**

✓ 23% Neutral

✓ 15% Disagree

AI Will Be More Important in 5 Years to My Practice

✓ **56% Agree**

✓ 31% Neutral

✓ 12% Disagree

I Have Concerns about Integrating AI

✓ **56% Agree**

✓ **29% Neutral**

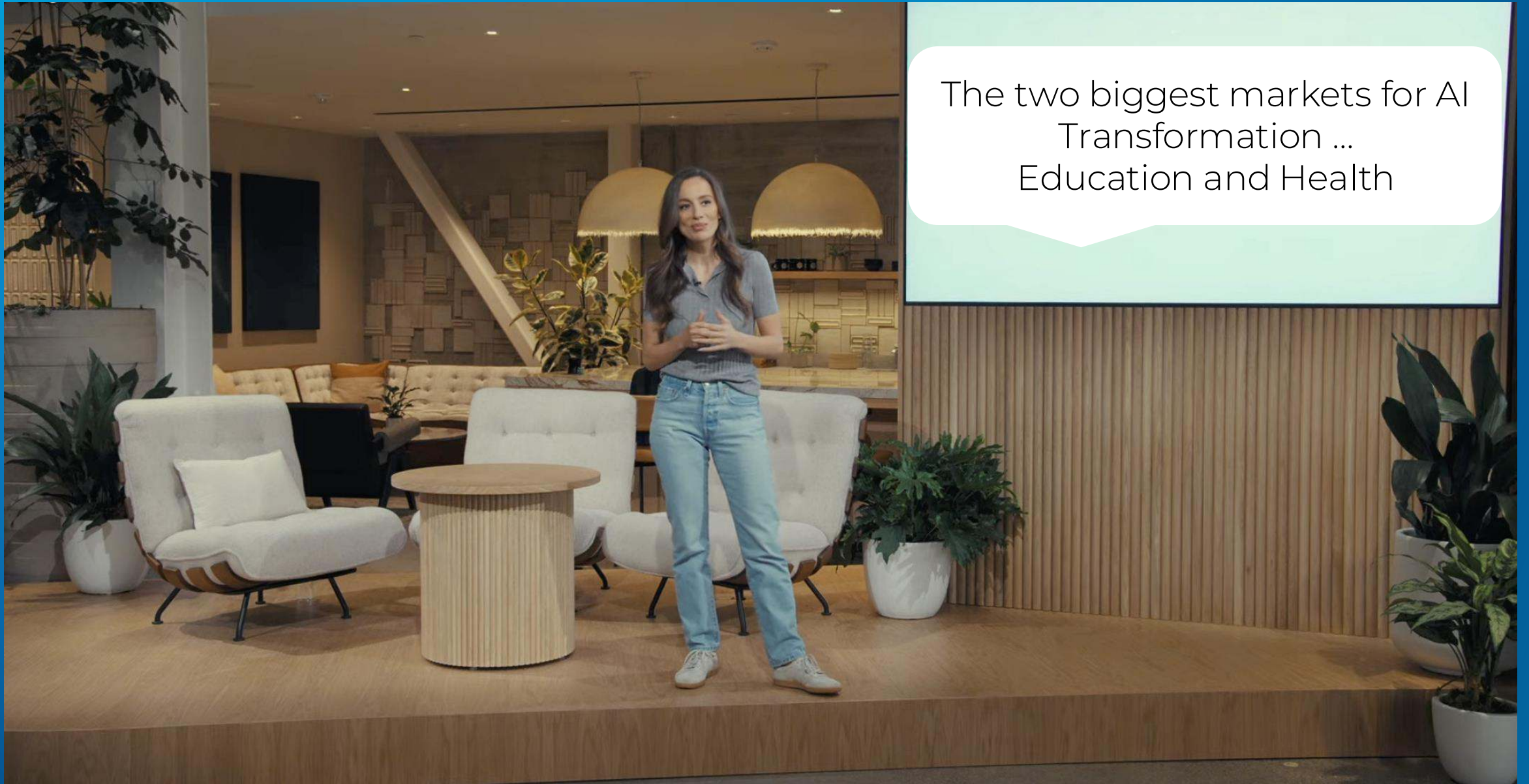
✓ **16% Disagree**

My Practice Makes Good Use of AI

✓ 23% Agree

✓ 43% Neutral

✓ 35% Disagree



The two biggest markets for AI
Transformation ...
Education and Health

HCP Digital Trends

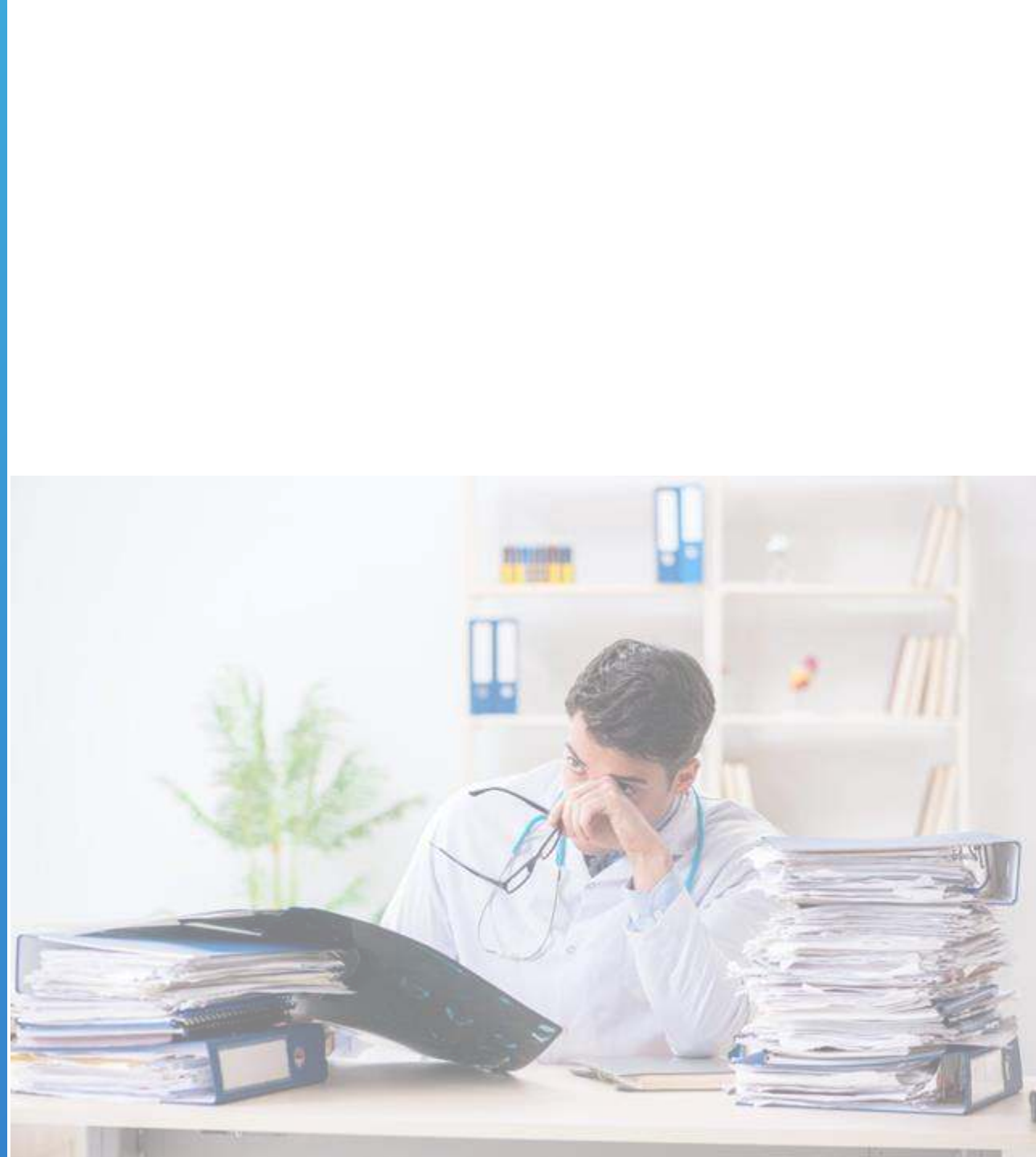
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Physician Satisfaction with Work-Life Balance

✓ 8% **Extremely Unsatisfied**

✓ 22%

✓ 30% **Neutral**

✓ 28%

✓ 13% **Extremely Satisfied**

Younger physicians (under 40) were significantly less satisfied than older physicians

“Time Management”

“Stress Management”

“Setting Boundaries”

“Dealing with the EMR”



H C P D i g i t a l T r e n d s

V o i c e o f t h e C u s t o m e r

A S t u d y b y D H C a n d H e a l i o