



Social Channels Gain Credibility with Healthcare Practitioners

New research reveals how HCPs use social and how healthcare and pharma marketers can tap social's growing popularity

SOCIAL MEDIA HAS BECOME AN IMPORTANT TOOL FOR HCPs

Social media has become an important tool for healthcare professionals, evident in the **increasing numbers of physicians who say the information they gather from social channels can influence their perception of medications, treatment options, and which prescriptions they write.**

Healthcare and pharma marketers need to be ready to meet HCPs where they are in their social use. While marketers have budgeted for social in 2023, it's not clear these strategies fully embrace the channels HCPs are using and how they use them.

Those are two of the major findings in recent research LiveWorld commissioned to understand

the relationship HCPs have with social channels and **how effectively pharma marketing strategies are incorporating this key trend.** We partnered with Sermo, a leading physician social platform, to conduct the first granular assessment of how HCPs engage with social, using responses from 206 US physicians across 10 specialties. To understand how pharma marketers are approaching social as a strategic channel, we surveyed 50 leading pharma company marketers.

Analyzing our results about how HCPs currently use social reveals rich insights that should help guide and inform new ways for pharma marketers to harness the increasingly critical role social has gained in reaching and influencing HCPs.



KEY FINDINGS

- 1. Information on certain social channels has an impact on the prescriptions some HCPs write.** Whether social sharing has an impact on prescription choices tends to depend on an HCP's age and experience.
- 2. HCPs strongly value peer-to-peer interactions on social channels.** HCPs also download clinical information and follow professional associations.
- 3. Influencers with the right credentials gain HCP followers.** Yet more than 40% of pharma marketers have no social influencer strategies.
- 4. HCP activity on social channels varies by medical specialty and demographics.** The more diverse the patient population served by an HCP, the more likely they are to use social channels.
- 5. HCPs participate in a mix of private medical and public social channels for professional purposes.** Pharma marketers have an opportunity to reach HCPs with tactics tailored to the strengths of different channels.

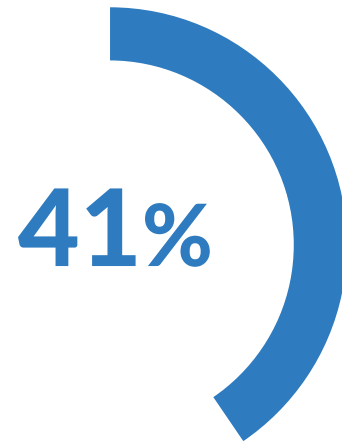
KEY FINDING 1: Social is Influencing HCP Script Writing Behavior

For the first time ever, data from the LiveWorld-Sermo survey showed that **content from social channels has an impact on which therapies HCPs prescribe.** Nine percent of respondents said they “frequently” change the prescriptions they write based on information from social media; 32% said they do so “occasionally.” Just 21% said they “never” change scripts based on social channel information.

Age apparently influences whether HCPs are likely to change their views about a therapy based on data from social channels. Physicians aged 65-74 say they never alter their perceptions of medications or change their prescribing behavior based on social media information. Younger practitioners (ages 35 to 44) participate in private groups on Facebook and occasionally change their thinking about medications and treatments.

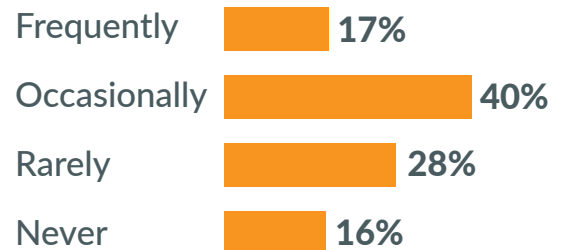
Our take:

These findings have substantial implications for how pharma marketers allocate their budgets. Pharma marketers may now tailor messaging to distinct HCP demographics on specific platforms. This ability will help fill gaps in campaigns left by the new algorithms and expanded privacy policies on many of the major social platforms that have made it more difficult to find members of narrow target audiences.

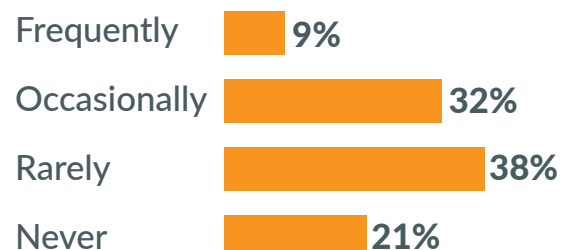


41% of doctors think social media influences prescribing behavior.

How often do you change your perceptions of medications or treatments based on information accessed on social media?



How often do you change your prescribing choices based on information on social media?



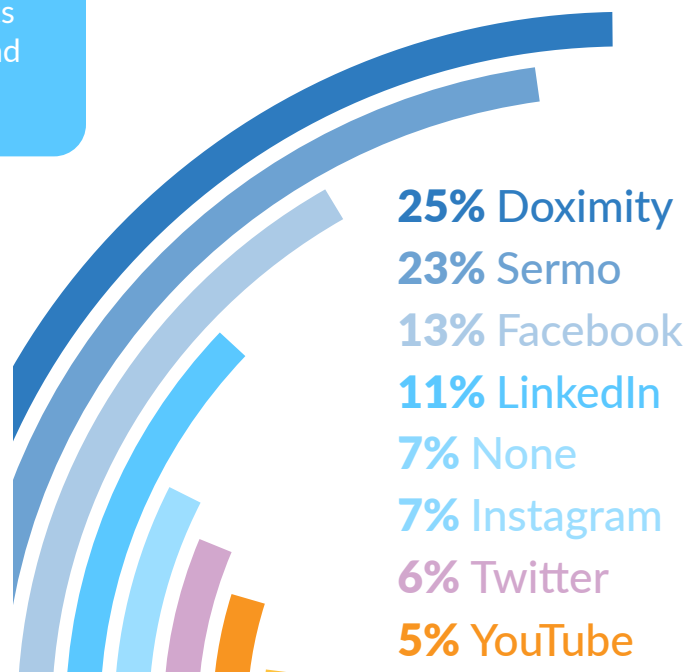
KEY FINDING 2: Peer to Peer Interaction is a Major Attraction

HCPs increasingly use social media to connect with peers in HIPAA-compliant networks such as HCP-only walled gardens or end-to-end encrypted messaging platforms. Peer-to-peer interaction on WhatsApp is important to highly specialized HCPs such as neurologists and cardiologists. This suggests **U.S.-based HCPs are interacting with their peers around the world.**

Doximity and Sermo are the most popular private platforms for accessing scientific or professional information. Respondents who report being active on Facebook and LinkedIn also access clinical information from those sources and follow other practitioners.

Our take:

The importance of peer-to-peer interactions suggests that pharma marketers will need to mobilize and enroll MSLs and KOLs to transparently participate in the ongoing conversations on platforms favored by physicians. Expanding the role of these experts will build access and favorability for brands and pharma companies.



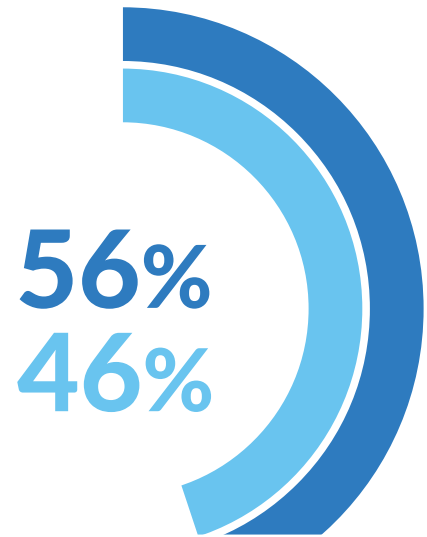
KEY FINDING 3: HCPs Will Follow Credible Influencers

Almost 50% of HCPs said they follow an HCP influencer on social media. To be worth following, **influencers must have credible credentials, content that's relevant to the HCP's practice and deep knowledge about the topic being discussed.**

This may be a missed opportunity for pharma marketers. While 92% of marketers said they found influencers a valuable tactic, and 94% said Digital Opinion Leaders (DOLs) are an important promotional factor, just 56% have included digital influencer programs in their 2023 plans and budgets.

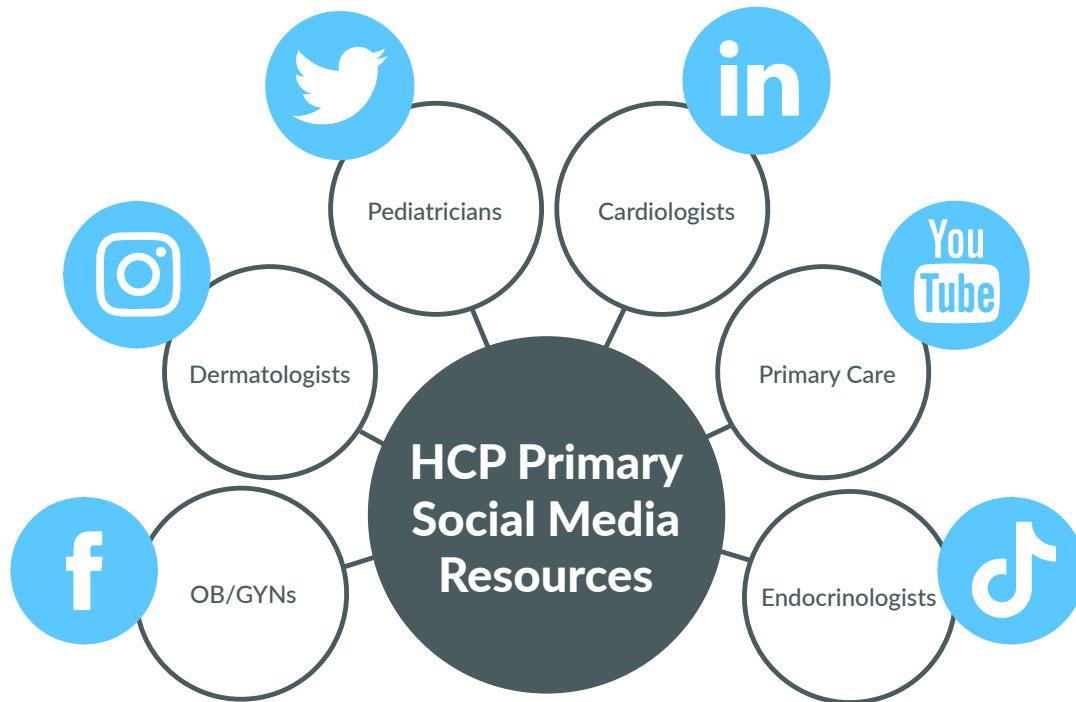
Our take:

The initial use of DOLs will pose a challenge to most med/reg teams. Carefully select and vet a DOL. Precisely define the role and the degree of endorsement or co-creation. Then test drive a limited campaign on a relevant social platform to get a read on the DOL's true measure of influence and credibility.



46% of participating doctors follow an HCP influencer on social media, but only **56%** of marketers have included digital influencer programs in their 2023 plans and budgets.

KEY FINDING 4: Social Behaviors Vary By HCP Practice Areas and Demographics



HCPs are not a monolithic social audience. The social channels they patronize and their activities on them **distinctly varies by specialty**. Physicians who treat broad patient populations participate in discussions about a wide range of conditions. The most active social HCPs are in primary care, internal medicine, pediatrics and dermatology. They tend to follow peers, change their thinking about medications, post on social platforms or participate in online groups or journal clubs. In contrast, hematologists, neurologists and gastroenterologists make the lightest use of social media for professional purposes.

Female physicians use and prefer Instagram for professional information and for participating in private medical groups. Male HCPs prefer Sermo in addition to following hospitals and

professional associations. They also report changing their perception of medications or treatments based on data gleaned from social media slightly more than female HCPs do. HCPs in the 25 to 34-year-old range use and prefer Instagram and are most likely to test drive TikTok as a social media resource. Their counterparts aged 45-54 prefer YouTube, while physicians between the ages of 55 to 74 prefer Sermo.

Our take:

Marketers should avoid one-size-fits-all social messaging. HCPs do not necessarily respond alike. Produce segmented content based on specialty or demographic criteria and place the message on a platform preferred by your target population.

KEY FINDING 5: HCPs Use a Mix of Private Medical and Public Social Platforms for Professional Purposes

Social media today consists of dozens of platforms. Since the pandemic, we've seen growth in private channels and walled gardens designed for HCPs. **Among these, our survey showed Doximity and Sermo are the most popular private platforms for accessing scientific or professional information.**

Their years in practice shape the importance of social media to physicians. Of physicians with 2 to 5 years of practice, 95 percent maintain relationships and follow professional associations on Instagram and WhatsApp. Physicians in practice between 6 to 10 years favor Facebook and Twitter. Those with 11 to 20 years of practice experience say they frequently change their thinking about medications and occasionally change their prescribing choices because of information found on social media. Perhaps predictably, physicians with 31 to 40 years of experience don't see social media as an important resource.

Medical employees tend to be more active on social media than private practitioners. They

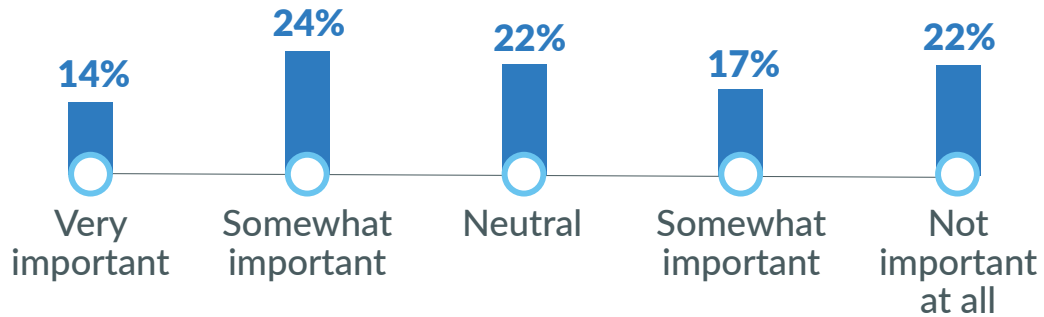
tend to favor Twitter and are twice as likely to change their perceptions of medicines or treatments based on social media. Employees of hospital systems are twice as likely to read or download clinical information, primarily on Twitter. Academic physicians prefer Twitter to follow other professionals and maintain relationships.

Instagram, YouTube and WhatsApp are each used by one in four doctors surveyed. Only about a dozen respondents said they use TikTok and Snapchat for professional purposes, but we are seeing rapid growth on those platforms.

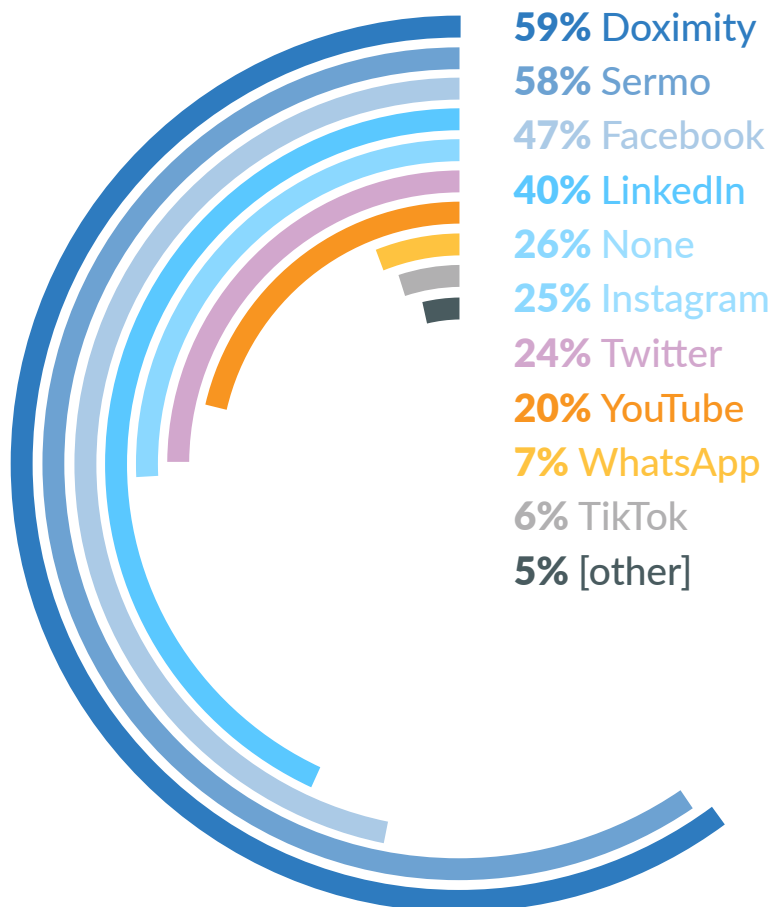
Our take:

The baseline importance of social media for HCPs is a given. Marketers have embraced this fact, with 92% of them saying that social can influence medical decisions. While not all HCPs say social is important, younger physicians clearly are tapping into the resources today's channels offer. This arena is active and growing and demands attention from all parties.

HCPs: How important is social media as a professional information source for you?



HCPs: Which of the following social media, if any, do you use for clinical or professional purposes of any type?



WHAT TO DO NOW

The finding that interactions on social channels influence HCP prescriptions, as well as their perceptions about medications, clearly confirms **social media has matured**. Social has become a critical, compelling and serious tool for pharma marketers. While our survey showed pharma marketers think social channels are important, and even budget for them, their budget priorities don't always reflect how HCPs engage with these channels.

That may be in part because the rules of social marketing are very different from traditional promotional channels. Effective digital social outreach requires careful and compliant presentation of clinical or medical facts or opinions. To take advantage of social's credibility among HCPs, we recommend the following:

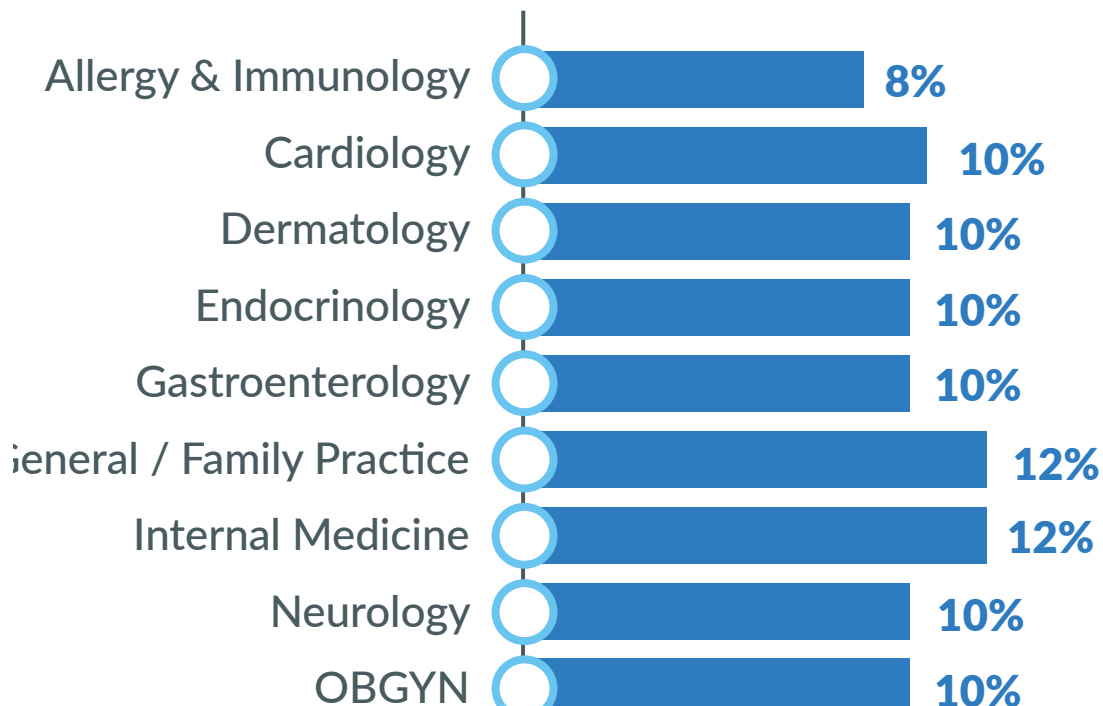
- **Plan** to use public and private social media in your NPP efforts from the outset.
- **Focus** messaging to provoke changes in thinking and prescribing behavior.
- **Account** for differences in personality, practice dimensions and HCP attitudes by specialty.
- **Target** HCPs by their primary social platform. Check reach, time spent and frequency of use.
- **Develop** data-rich short, snackable and shareable content, preferably using video.
- **Have MSIs join private groups and clubs** in social media to read the markets.
- **Find, vet and test** co-creation with Digital Opinion Leaders (DOLs).
- Remember HCP social media content must be **FDA-compliant and moderated**.



SURVEY METHODOLOGY

The LiveWorld-Sermo survey was conducted in December 2022 among US physicians. **We received responses from 206 physicians, evenly divided among ten specialties.** Of our respondents, 53% were associated with group practices; 37% were employees of hospitals, academic institutions, or hospital systems; and 9% were solo practitioners. Two-thirds were male; 79% were 25-54 years old; and 53% have been in practice between six and 20 years.

The LiveWorld survey was conducted in December 2022 among pharma marketers. **We received responses from 50 marketers in pharmaceutical firms of every size** with titles ranging from Manager to VP/Director to CMO. The questions were designed to gauge perceptions of and planning decisions about the use of social media for non-personal promotion to HCPs.



ABOUT LIVEWORLD



LiveWorld is a digital agency with deep social and technology expertise that help companies spark emotional connections, build stronger customer relationships, and drive behavior change. We live at the intersection of bold creative rooted in strategy that inspires, moderation that activates human interactions, and technology that enriches and scales customer experiences. With over 26 years of making connections,

our integrated team leverages our social media DNA to deliver emotion driven behavior change through digital campaigns with a human touch. LiveWorld clients include the number one brands in pharmaceuticals, healthcare, and financial-travel services. Learn more at www.liveworld.com and [@LiveWorld](https://twitter.com/LiveWorld).

ABOUT SERMO



Sermo turns physician experience, expertise, and observations into actionable insights for the global healthcare community. Engaging with more than 1.3 million HCPs across 150 countries, Sermo provides physicians with a social platform and unique community that fosters impactful peer-to-peer collaboration &

discussions about issues that are important to them and their patients. Sermo offers on demand access to physicians via a suite of proprietary technology to provide business intelligence that benefits patients, pharmaceutical, healthcare partners and the medical community at large. To learn more, visit www.sermo.com

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