

everybody

Drug information: What HCPs need

A survey of HCPs in the US and EU5 markets.



Report purpose and overview

This report sets out how HCPs source information on prescription drugs and provides insight in to how their experience can be improved. Over 1,000 HCPs were surveyed across 6 markets; France, Germany, Italy, Spain, the UK, and the US.

We outline sources of information that HCPs are influenced by when making prescription decisions and where they seek information on drug administration. There are detailed insights into HCPs preferences related to pharma-owned websites, which provides guidance on how the experience could be improved.

This report is split into three sections highlighting global themes before breaking this down to uncover challenges and opportunities within the different regions and amongst different specialist groups.



In this report

Report purpose and overview	02
<hr/>	
Global HCPs	03
What are HCPs looking for from their sources of prescription and drug administration information?	
<hr/>	
Regional Preferences	08
How do HCP preferences vary in the US vs the EU big 5?	
<hr/>	
Specialism Specifics	13
How do content needs change by specialism?	
<hr/>	
How can we better meet HCPs needs on pharma-owned websites?	20
<hr/>	
Methodology	23



Global HCPs

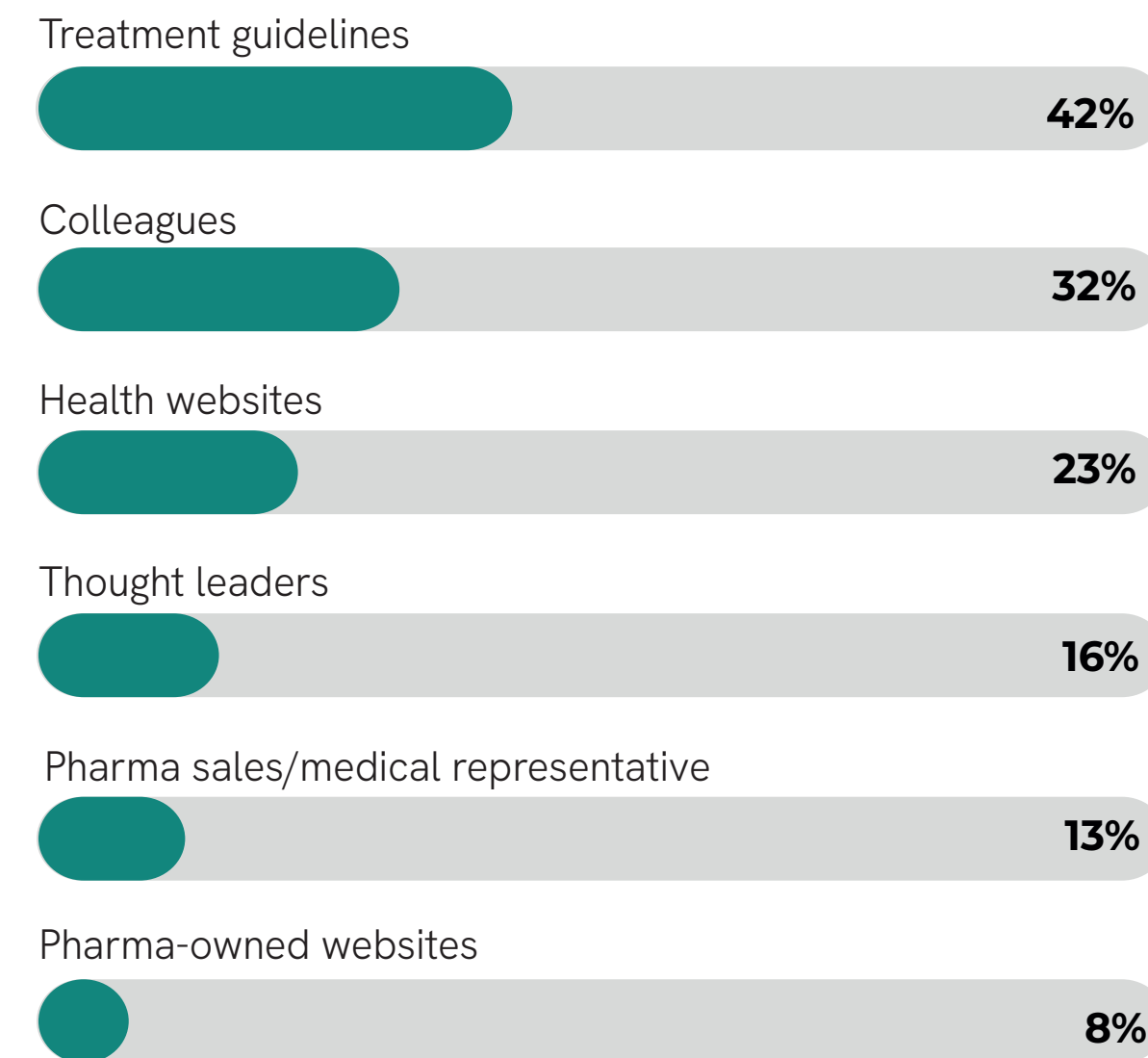
What are HCPs looking for from their sources of prescription and drug administration information?

01

HCPs are more likely to use 'pharma-owned websites' for drug administration information than prescription decisions

Q1. Which sources of information most influence your decision on what drug to prescribe? Please select your top 3 choices.

1,042 responses | % of respondents

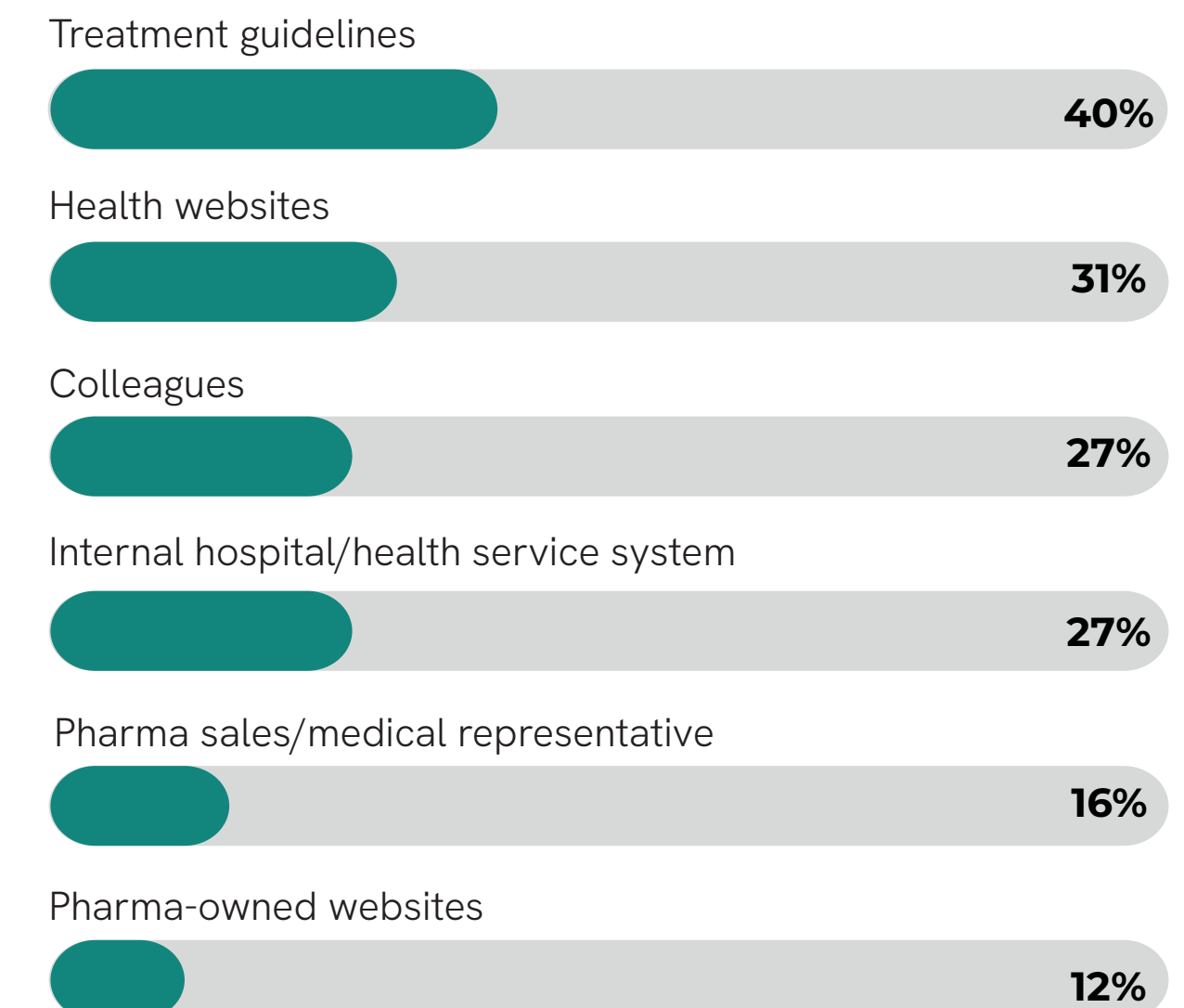


'Treatment guidelines' and 'colleagues' are the most influential sources when making prescription decisions. This means that a focus on market access and creating HCP advocacy are highly impactful strategies.

'Pharma-owned websites' impact prescribing decisions though there is an opportunity to increase their influence.

Q2. Where do you seek information on administration of drugs (e.g., dosing, side effects, etc)? Please select your top 3 choices.

858 responses | % of respondents



Whilst 'treatment guidelines' remain the go to source for information on administration, both 'health websites' and 'pharma-owned websites' play a significant role.

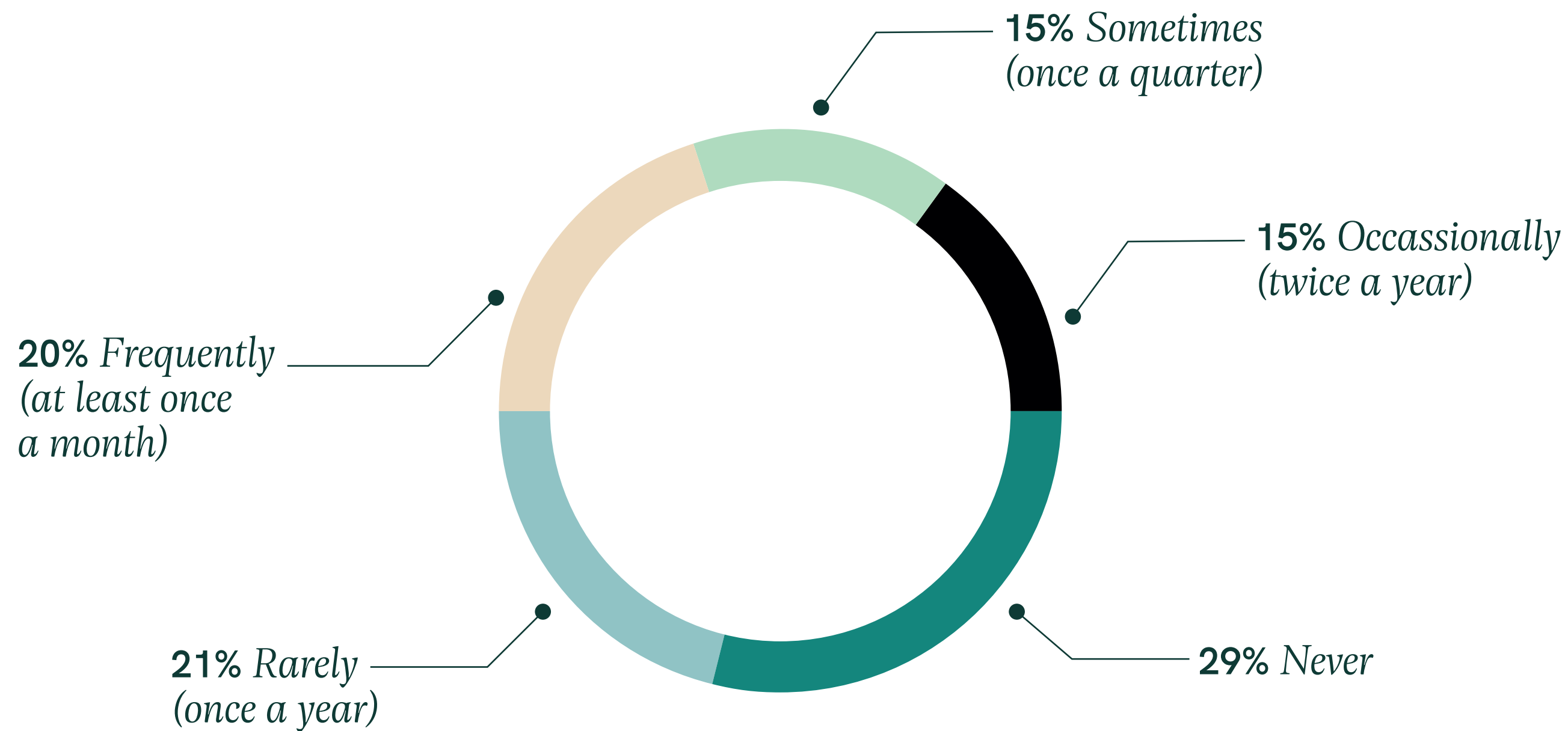
HCPs are +50% more likely to refer to 'pharma-owned websites' for administration than prescription decisions. Serving this need well will improve the experience of HCPs.

50% of HCPs report using pharma-owned websites at least twice a year, and usage increased during the pandemic

Q3. Do you visit pharma-owned prescription drug sites? How often?

742 responses

50% of HCPs responded that they use pharma-owned websites at least twice a year, which shows the importance of brand sites as a channel. It also shows there is a lot of headroom to increase usage and frequency.



Q4. How has your usage of pharma-owned websites changed due to the pandemic?

123 responses

More than half of respondents reported a change in their usage of 'pharma-owned websites' as a result of the pandemic.

Of those HCPs who responded that their usage of pharma-owned websites had changed, **57% reported an increase in usage.** This means that pharma-owned websites play a greater role post-COVID and as a result, represent a greater opportunity for HCP engagements.

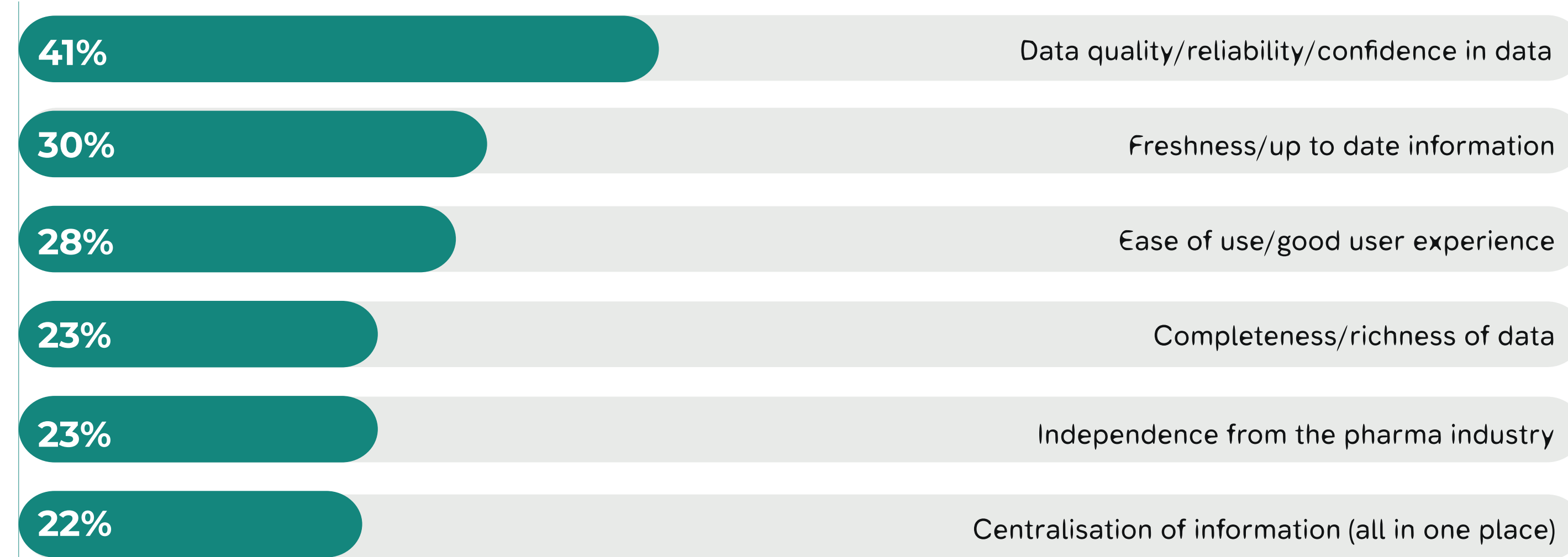
Unsure 5%
Unchanged 39%
Changed 56%



Independence from the pharma industry is not a primary consideration for HCPs

Q5. Which of the following options do you find desirable when seeking information on prescription decisions and administration of drugs? Please select your top 3 choices.

783 responses | % of respondents



'Data quality', the 'freshness of information', and 'ease of use' were cited as the most important factors for content. **Independence from the pharma industry does not appear to be a primary focus for HCPs, coming 5th versus other considerations.**



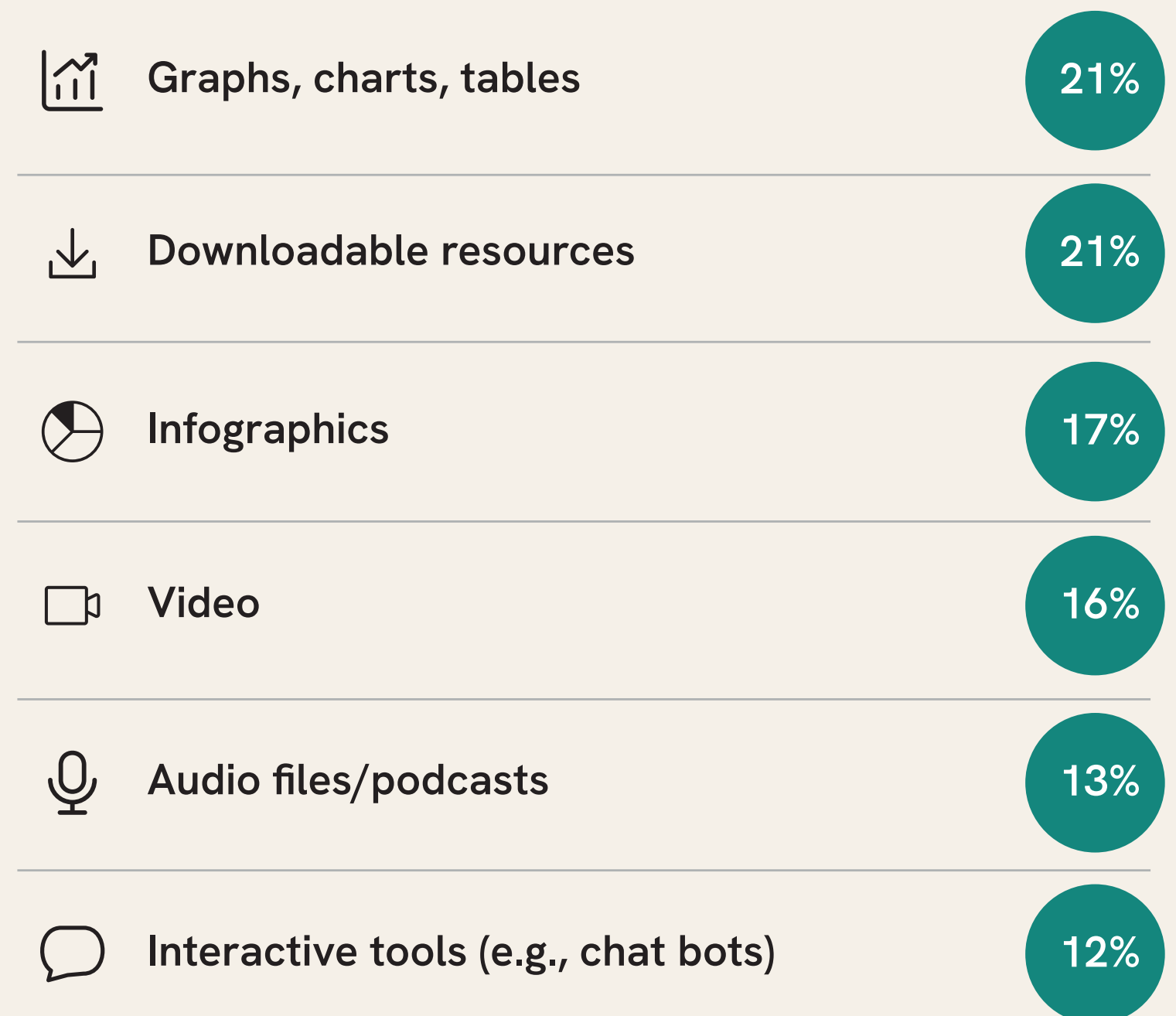
Dosing and administration and clinical data are the most valuable content

Q6. Of the following options what do you value most/ least from pharmaceutical brand websites? Select up to 3. (Net interest)
429 responses



'Dosing and administration' is identified as the most valuable information from pharmaceutical websites. Ensuring easy to use, accessible information on these topics will result in a good experience for HCPs. **'Clinical data' is highly valued**, which would suggest content that influences prescribing decisions is sought after.

Q7. What content formats would you like to see more of on drug information sites? Select your top 3.
411 responses



HCPs are looking for the most immediate and easy to access content formats. Diverse formats such as 'videos', 'interactive tools', and 'audio files' are still important.



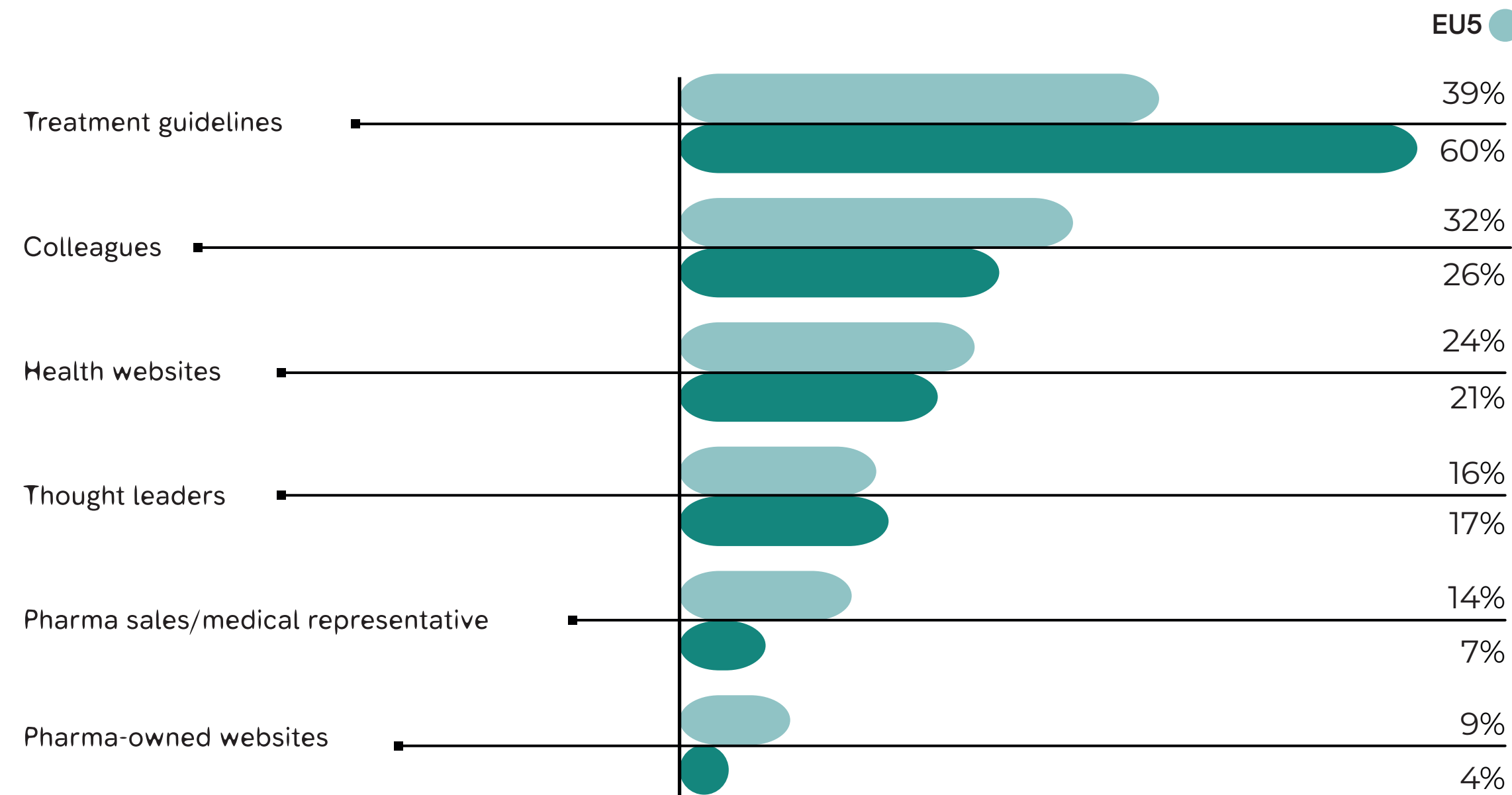
Regional Preferences

How do HCP preferences vary in the US vs the EU big 5?

02

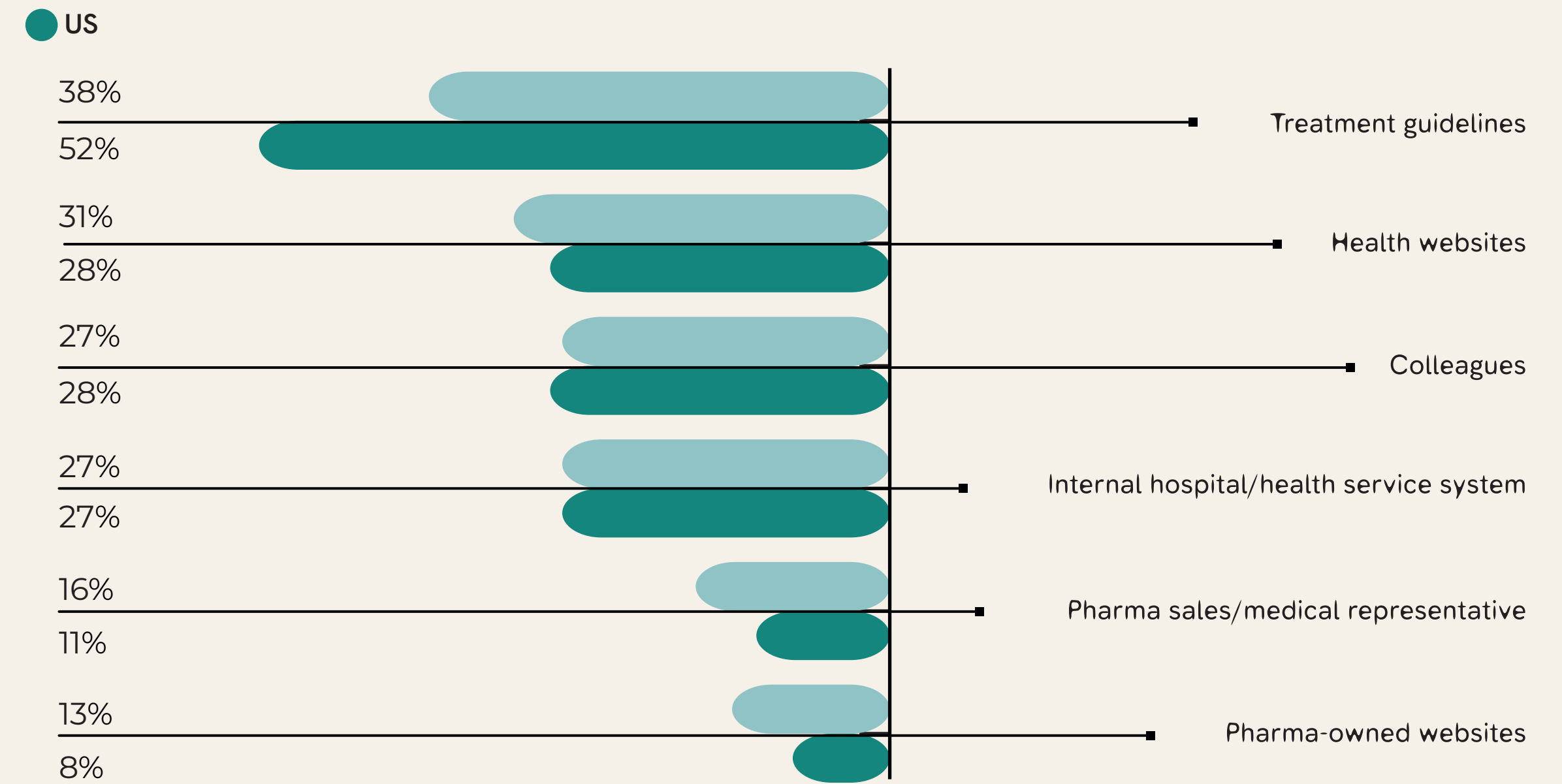
Treatment guidelines are more important to HCPs in the US

Q1. Which sources of information most influence your decision on what drug to prescribe? Please select your top 3 choices.
1,042 responses | % of respondents



The US face a greater challenge in influencing HCPs through 'pharma-owned websites' and 'pharma sales/medical representatives'. Colleagues play an important role in both markets, which shows the amplifying effect of creating advocates within the HCP community.

Q2. Where do you seek information on administration of drugs (e.g., dosing, side effects, etc)? Please select your top 3 choices.
858 responses | % of respondents

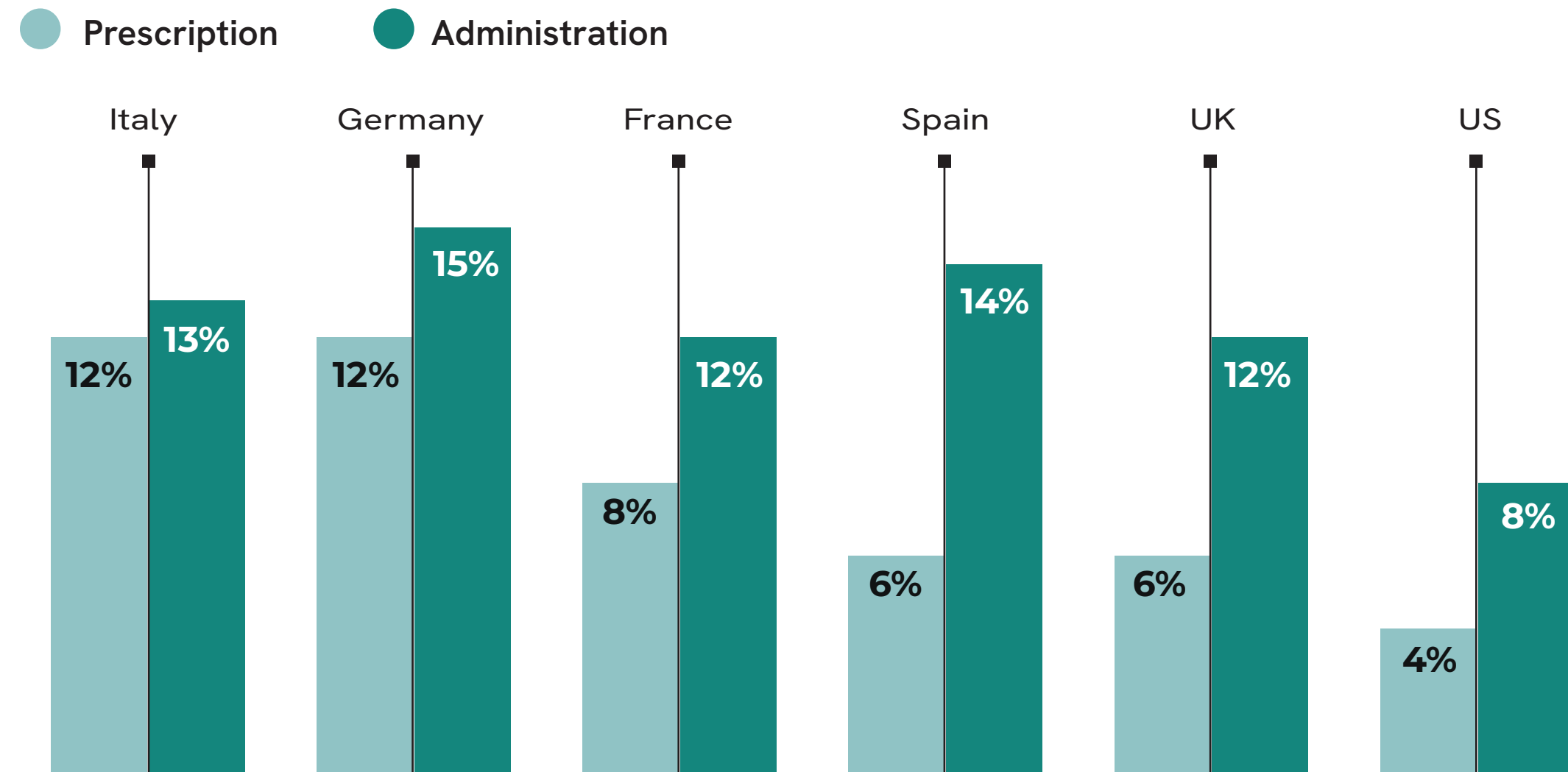


'Pharma-owned websites' play a more influential role in drug administration within both the EU5 markets and the US, although EU5 physicians remain more likely to utilise these resources. **Creating easy access to the right information will assist HCPs in initiating and supporting patients on treatments.**

The greatest opportunity for increasing the influence and usage of pharma-owned websites is in the US

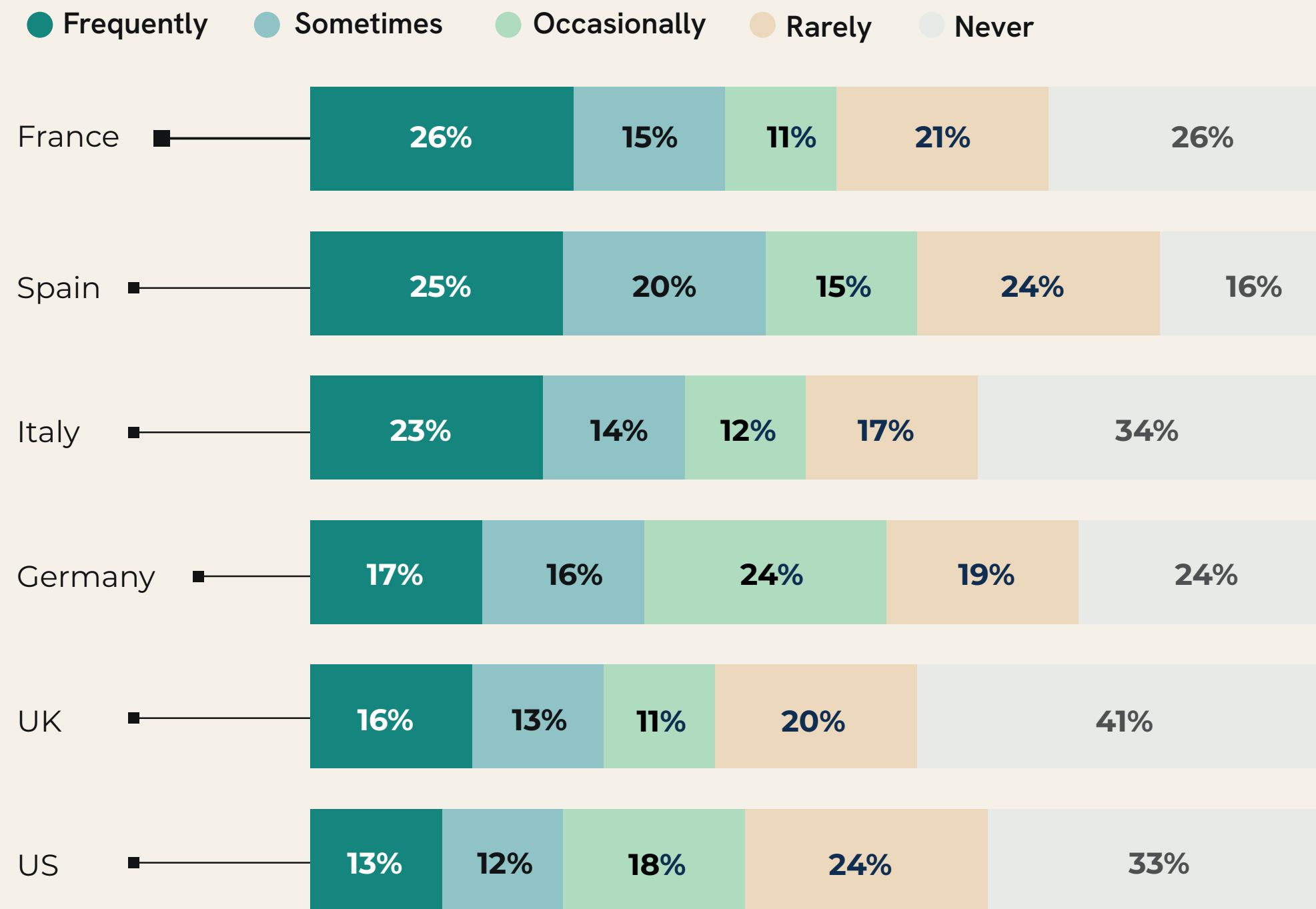
Proportion of HCPs within each market who cited 'pharma-owned websites' as an influential source of information for prescription decisions or drug administration.

1,096 / 912 responses



Pharma-owned websites have considerably more influence on prescribing decisions in Italy and Germany than in other markets. In every market HCPs show a preference for using pharma-owned sites for sourcing information that will assist them in the administration and ongoing treatment of drugs.

Q3. Do you visit pharma-owned prescription drug sites? How often?
742 responses

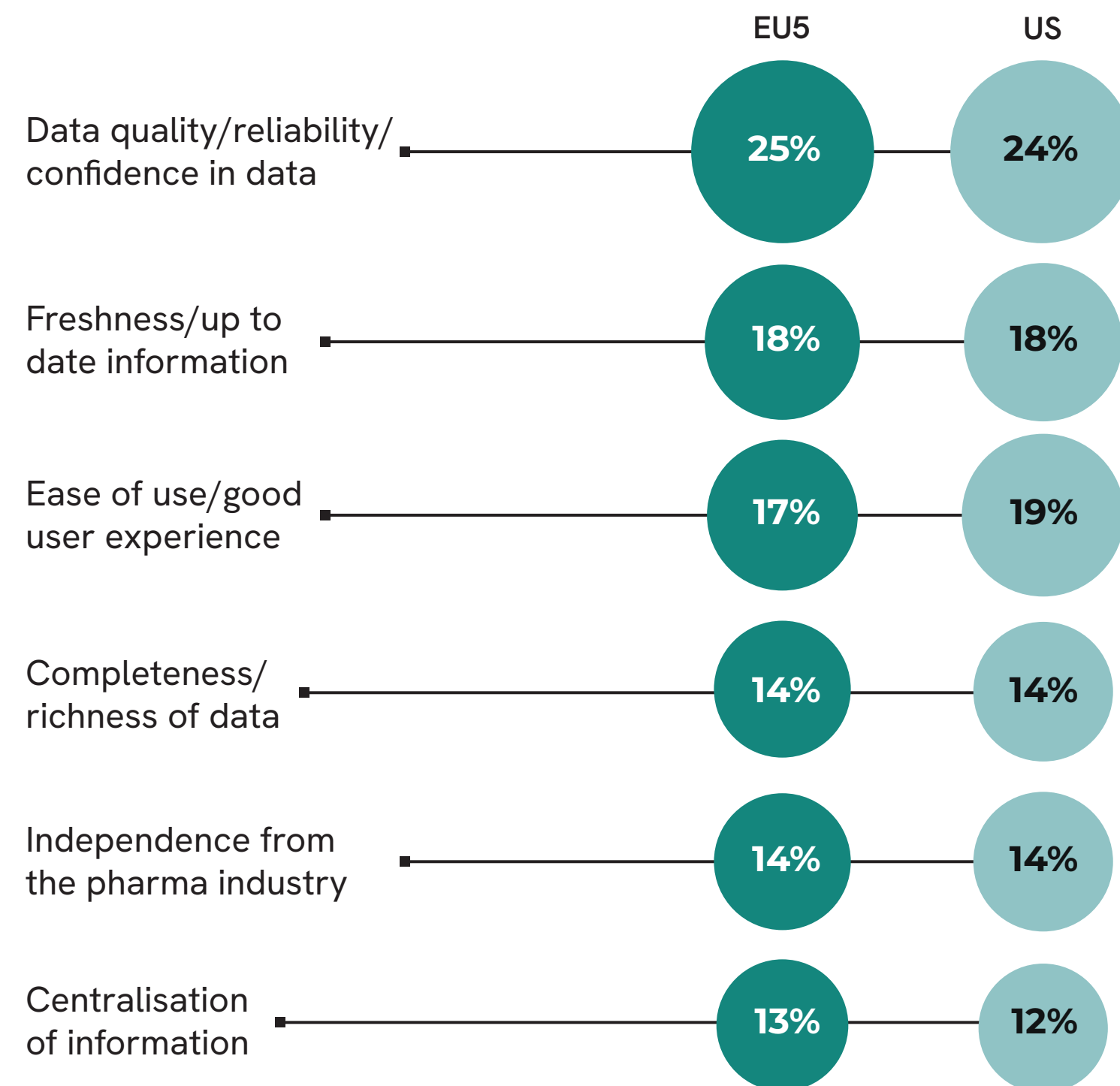


France, Germany and Spain lead the way in terms of overall usage of pharma-owned websites. However, even in the US, which has the lowest figures, 43% of HCPs report using pharma-owned sites at least twice a year.

Up to date, reliable data and a great user experience are key priorities in every market

Q4. Which of the following options do you find desirable when seeking information on prescription decisions and administration of drugs?
Please select your top 3 choices.

783 responses

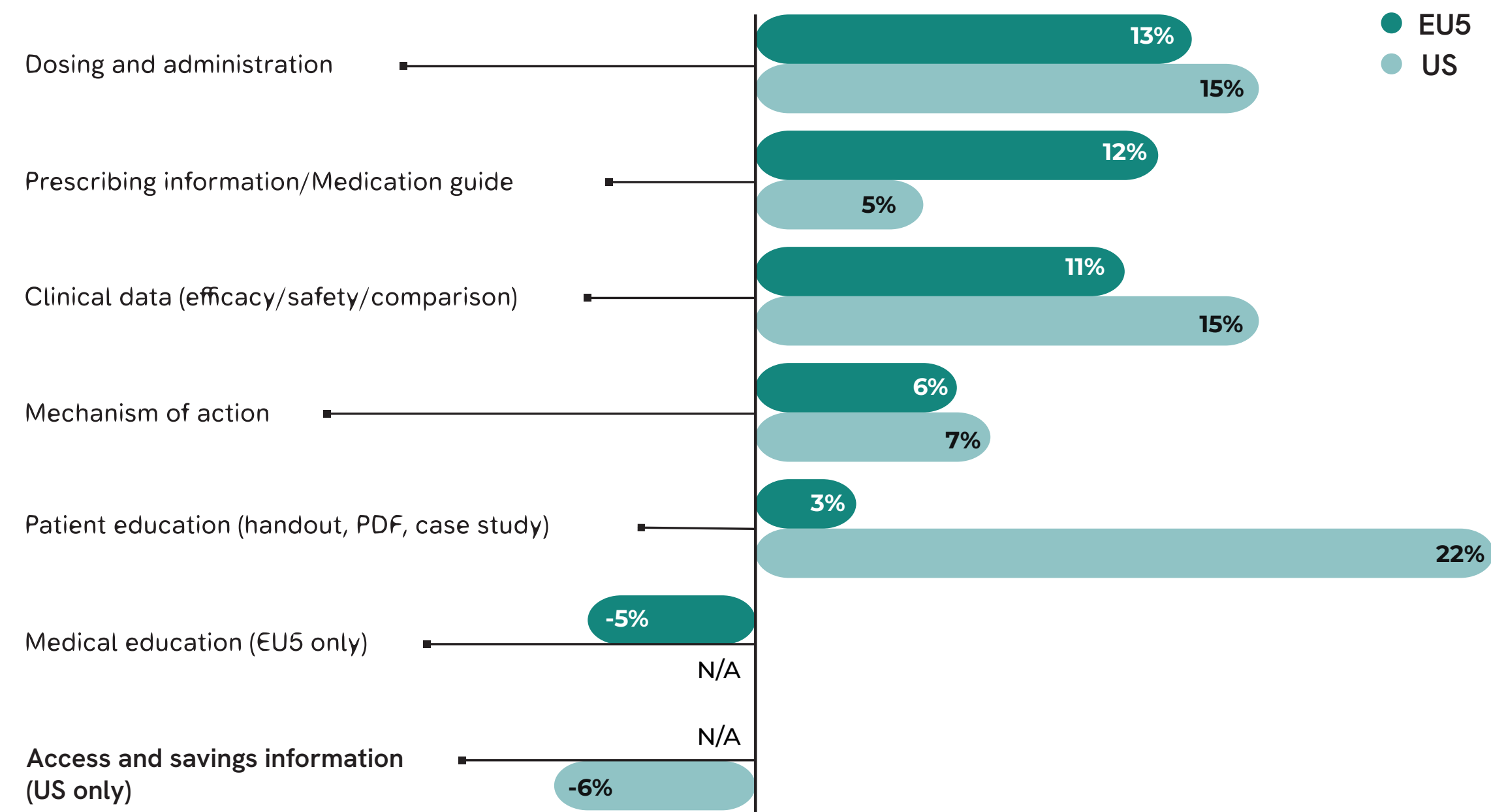


'Independence from the pharma industry' is a low priority in both regions - 5th most desirable factor. HCPs in both regions want good user experience and fresh information, which is the key to increased engagement and frequency for pharma- owned websites.



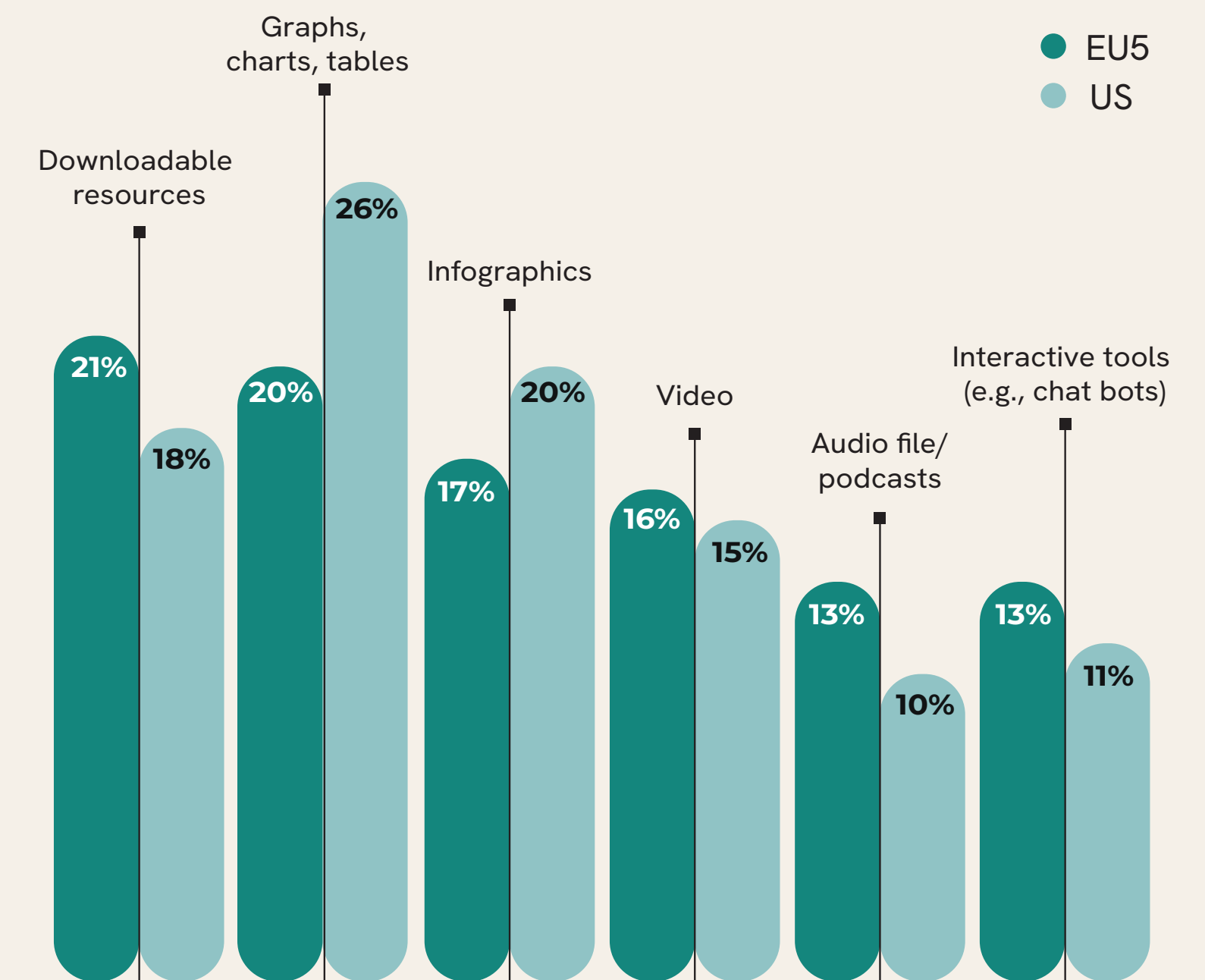
Patient education materials are important to HCPs in the US

Q5. Of the following options what do you value most/ least from pharmaceutical brand websites? Select up to 3. (Net interest)
429 responses



Patient education is the standout opportunity in the US, with high demand for this information. Medical education in the EU is not considered high value and neither is access and savings information in the US.

Q6. What content formats would you like to see more of on drug information sites? Select your top 3.
411 responses



HCPs are open to a wide variety of content formats across both regions. **Utilisation of varied formats will enrich the experience of HCPs** on pharma-owned websites.



Specialism Specifics

How do content needs change by specialism?

03

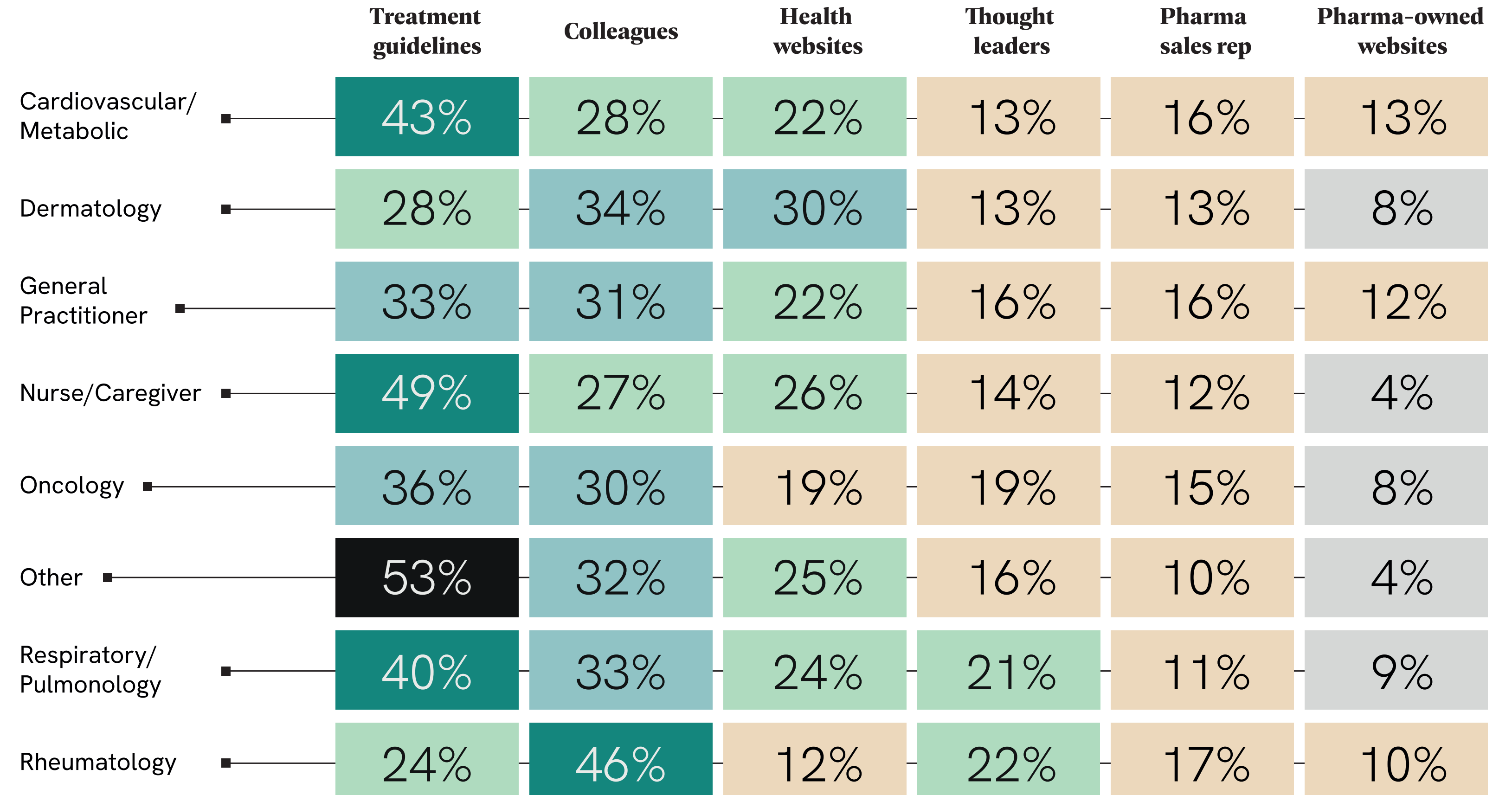
Dermatologists are the exception amongst HCPs as they are more influenced by ‘colleagues’ and ‘health websites’ than ‘treatment guidelines’

Q1. Which sources of information most influence your decision on what drug to prescribe? Please select your top 3 choices.

1,042 responses | % of respondents

Despite being a less common destination for information on the administration of drugs than other channels, pharma sales reps and pharma-owned websites play a very considerable role across all specialisms.

Building useful and compelling content on brand websites and empowering the field force to signpost it to HCPs will increase frequency and engagement.



Dermatologists and Oncologists, rank ‘colleagues’ higher than ‘treatment guidelines’ for information on drug administration

Q2. Where do you seek information on administration of drugs (e.g., dosing, side effects, etc)? Please select your top 3 choices.
858 responses | % of respondents

‘Pharma sales reps’ and ‘pharma-owned websites’ have a considerable role in providing information to HCPs.

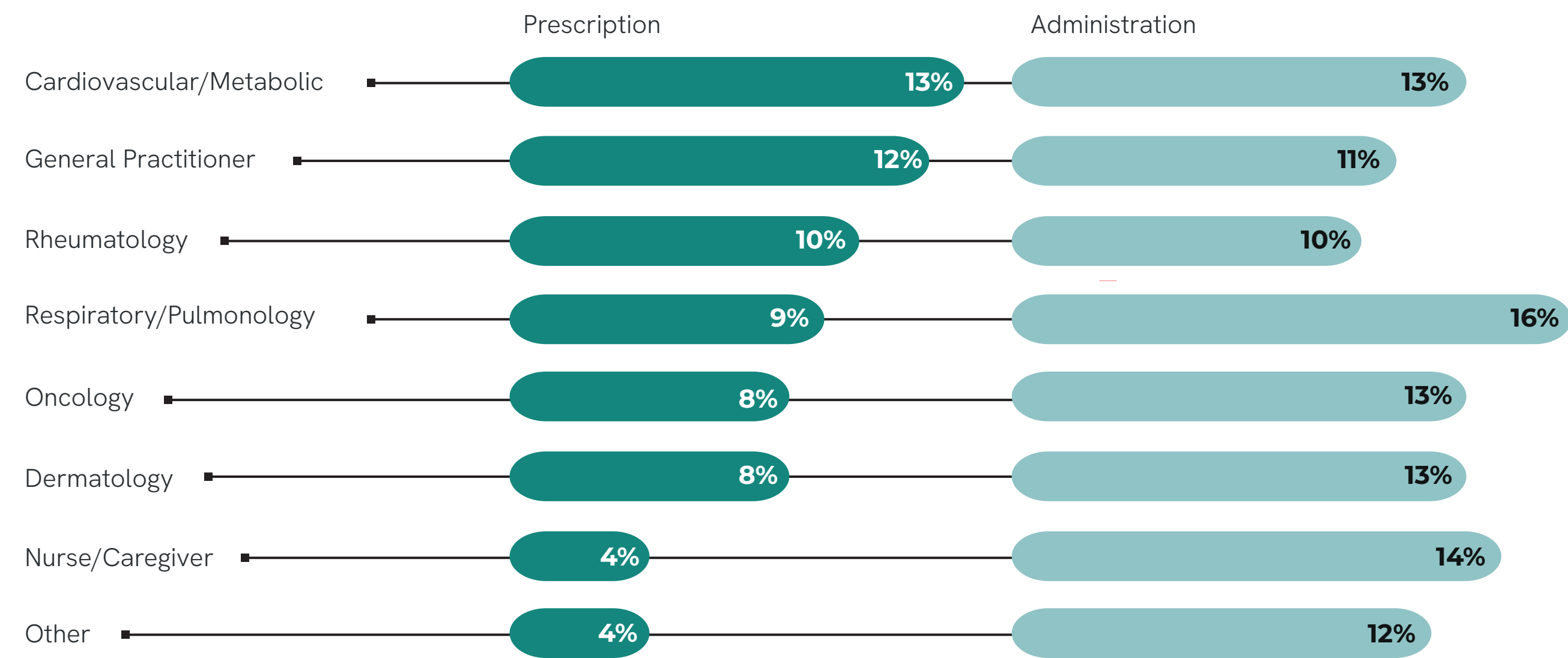
Providing accessible, easy to use information, which supports HCPs in the treatment of patients can be achieved by building clear site navigation, which gets them to what they need quickly.

	Treatment guidelines	Colleagues	Health websites	Internal hospital/ health service system	Pharma sales rep	Pharma-owned websites
Cardiovascular/ Metabolic	42%	21%	21%	19%	19%	13%
Dermatology	20%	22%	24%	18%	20%	13%
General Practitioner	34%	26%	27%	25%	18%	11%
Nurse/Caregiver	49%	39%	35%	29%	20%	14%
Oncology	21%	23%	28%	27%	14%	13%
Other	53%	41%	28%	32%	10%	12%
Respiratory/ Pulmonology	34%	27%	21%	27%	18%	16%
Rheumatology	36%	28%	26%	26%	18%	10%

Cardiovascular/Metabolic specialists are most influenced by ‘pharma-owned websites’ when making prescribing decisions

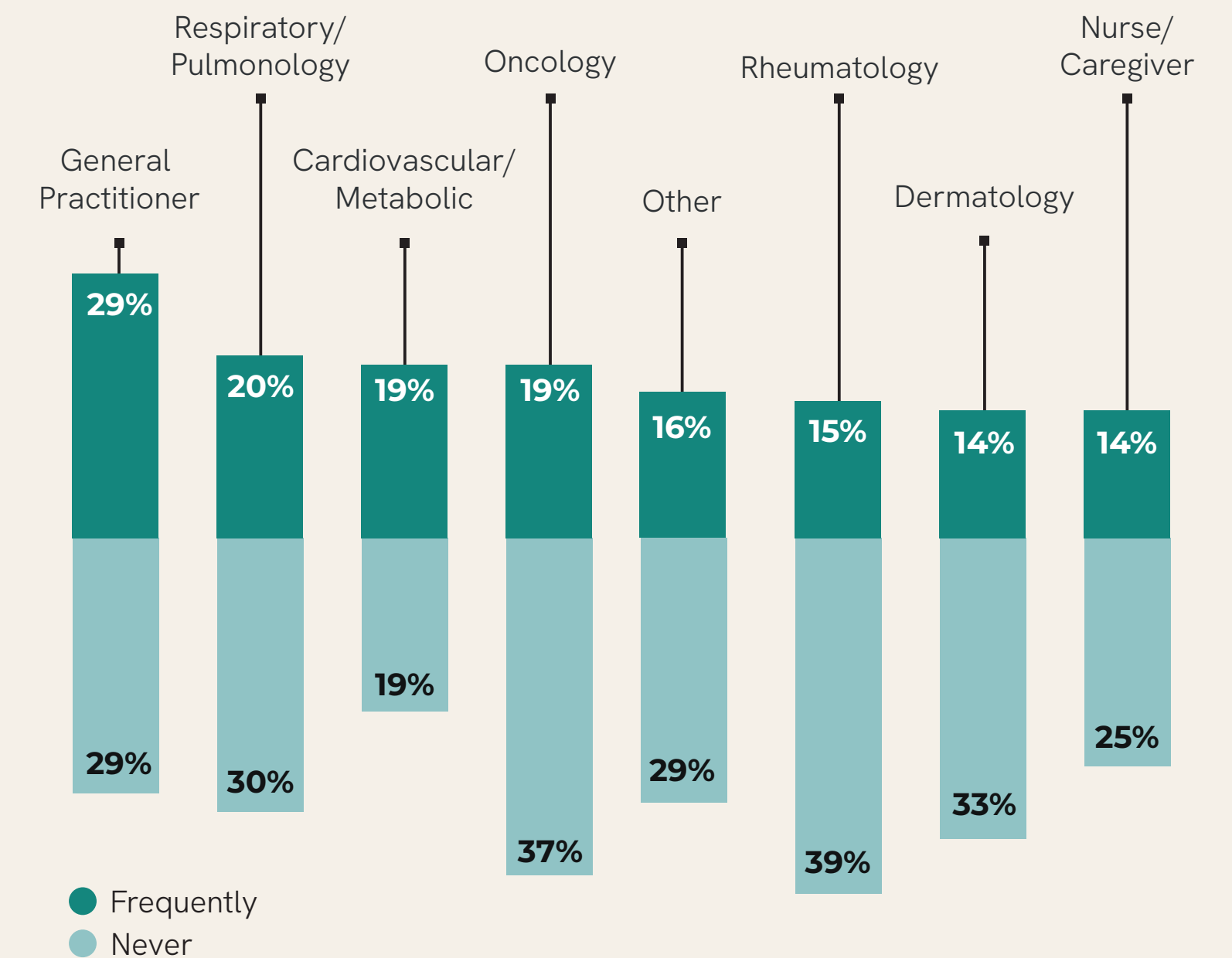
Proportion of HCPs within each specialism who cited ‘pharma-owned websites’ as an influential source of information for prescription decisions or drug administration.

1,096 / 912 responses



When looking at the data by specialism, it becomes evident that some specialist groups are more influenced on prescribing decisions by ‘pharma-owned websites’ than the aggregated numbers might suggest. Given ‘Nurse/Caregivers’ often cannot prescribe, this will have impacted the overall results.

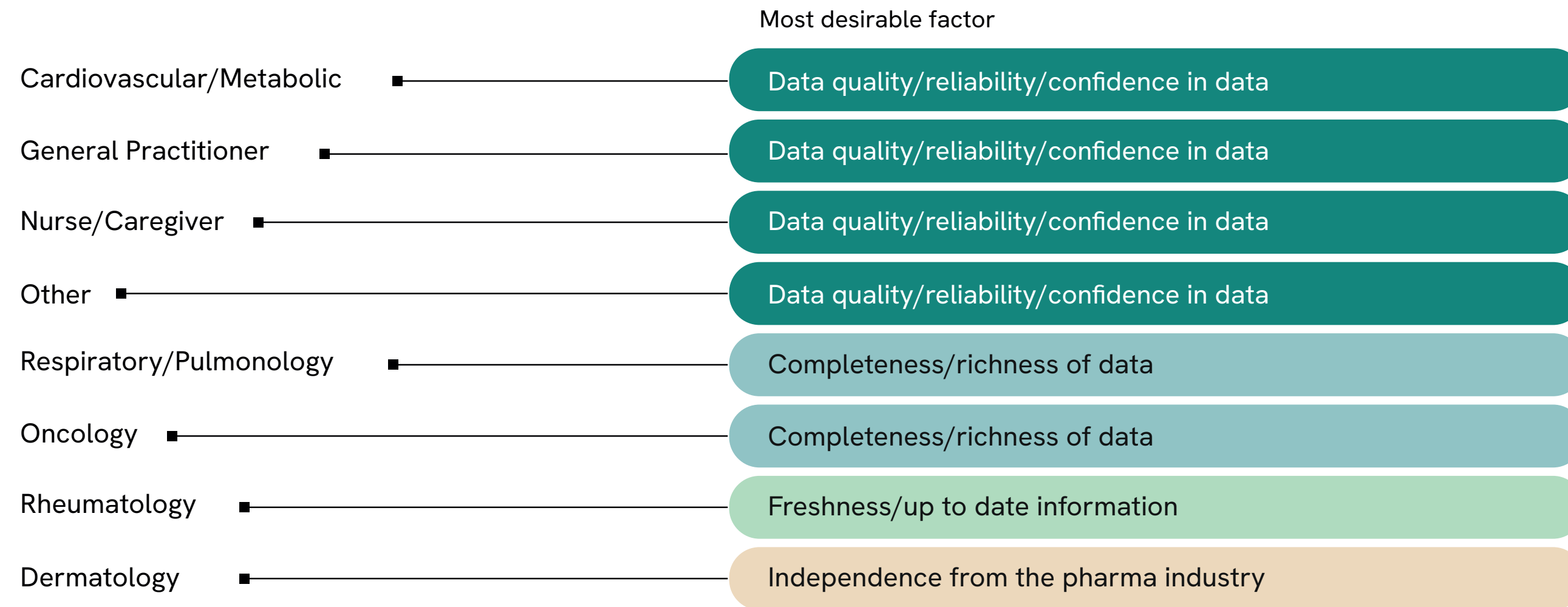
Q3. Do you visit pharma-owned prescription drug sites? How often?
742 responses



General practitioners stand out as those most likely to visit ‘pharma-owned websites’ frequently. This may be because specialists are more likely to favour novel content, the creation of which would potentially increase frequency.

Dermatologists desire independence from the pharma industry more than other specialists

Q4. Which of the following options do you find desirable when seeking information on prescription decisions and administration of drugs? Please select your top 3 choices.
783 responses



'Data quality' is the most commonly cited factor, prioritised as the number one factor by 4 of the 8 specialist groups. For oncologists, and those working within respiratory/pulmonology, pharma-owned websites will need to have a greater emphasis on the 'completeness of the data' provided.

How desirable do different specialisms find 'independence from the pharma industry'?
783 responses

Ranking factor (1-6)	← Important → Not Important →					
	1	2	3	4	5	6
Dermatology	1	2	3	4	5	6
Nurse/Caregiver	1	2	3	4	5	6
Other	1	2	3	4	5	6
General Practitioner	1	2	3	4	5	6
Oncology	1	2	3	4	5	6
Respiratory/Pulmonology	1	2	3	4	5	6
Rheumatology	1	2	3	4	5	6
Cardiovascular/Metabolic	1	2	3	4	5	6

Dermatologists are the only HCPs who place the greatest value on 'independence from the pharma industry', which may explain the fact that they are the most likely to report never using pharma-owned websites.

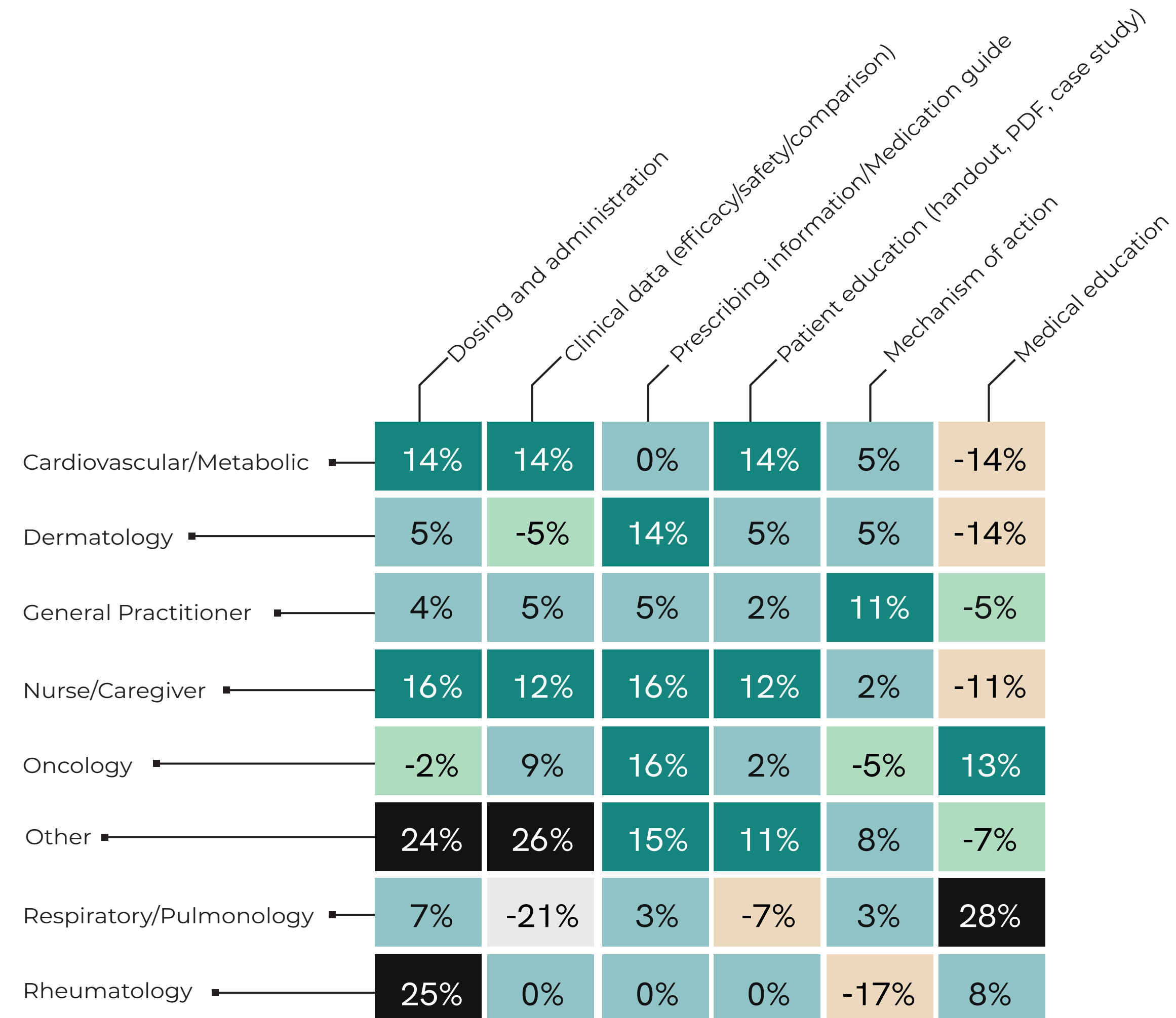
The provision of patient and medical education resources represent opportunities to serve HCP needs

Q5. Of the following options what do you value most/ least from pharmaceutical brand websites? Select up to 3. (Net interest)

429 responses

Dosing and administration, clinical data and prescribing information are generally sought after on 'pharma-owned websites'. Given this content is prevalent and mostly required on brand sites, a focus on it's quality and usability is where the opportunity lies.

'Patient education' is also highly valued across most groups, which suggests investment in these materials is wise. Desire for 'medical education' content on pharma-owned websites varies hugely among different groups, but should certainly be explored for oncology, respiratory and rheumatology.



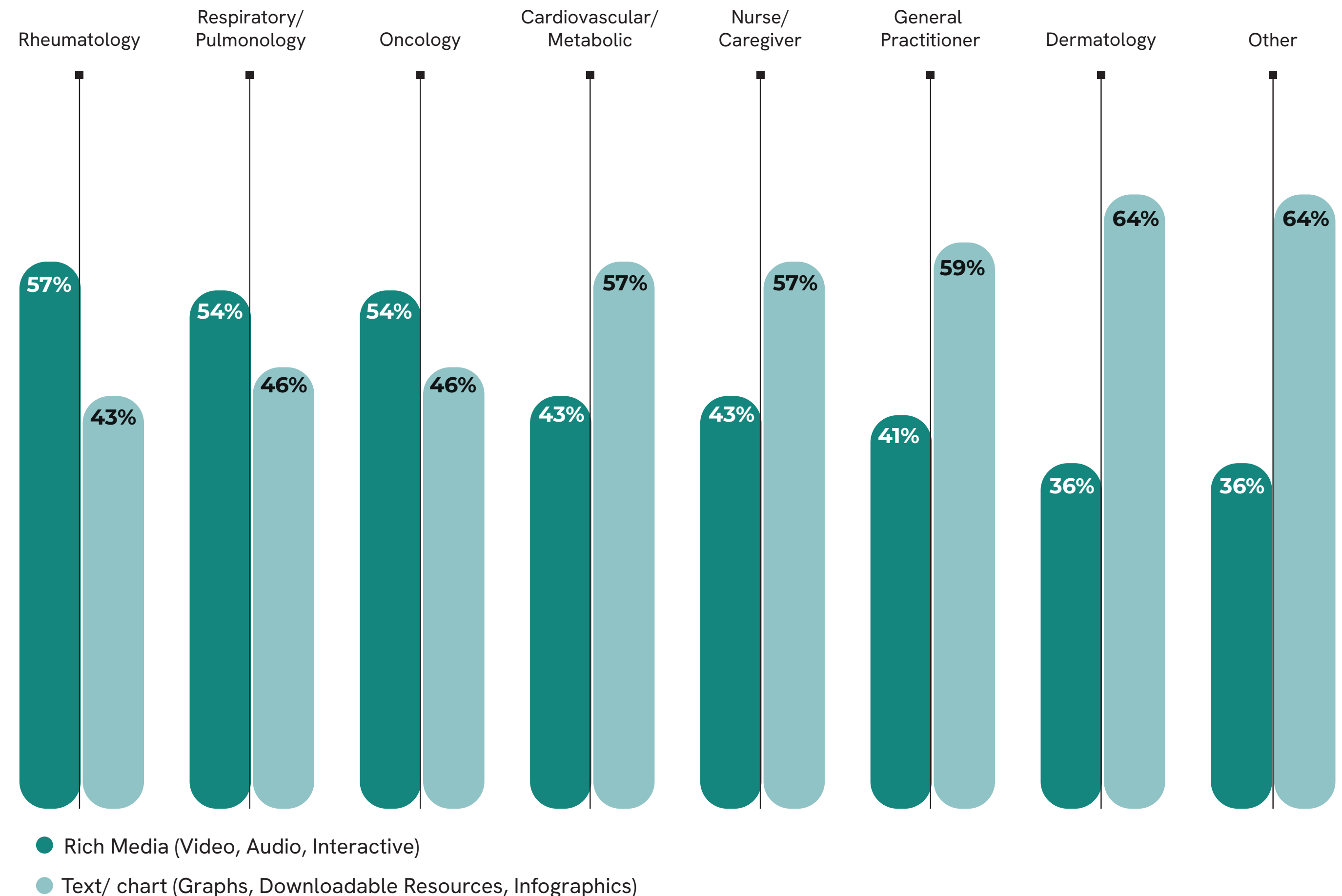
‘Video’ and ‘audio files’ are the most desirable formats for those specialists who value ‘medical education’ content

Q6. What content formats would you like to see more of on drug information sites? Select your top 3.

411 responses

For rheumatologists, respiratory/pulmonologists, and oncologists there is greater demand for alternatives to text/chart base formats.

These audiences were the three who perceived the greatest value from ‘medical education’ on pharma-owned websites, so there is a strategic opportunity to use these more engaging formats to meet that demand.





Actionable Insights

How can we better meet HCPs needs on pharma-owned websites?

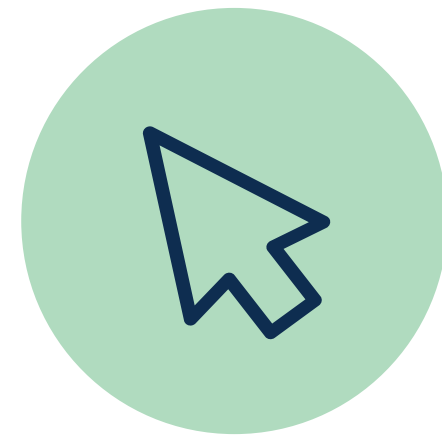
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How can we better meet HCPs needs on pharma-owned websites?

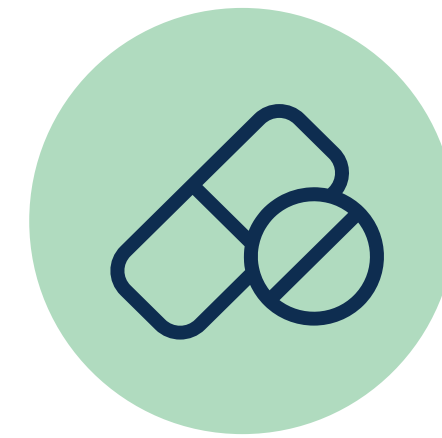
What is the opportunity?



'Colleagues' are the second most influential sources when making prescription decisions in every market, so building advocacy has an amplifying effect.



On average 50% of HCPs report using pharma-owned websites at least twice a year, with the outliers being the US (43%) and Spain (60%). This means they represent a great engagement opportunity in any market.

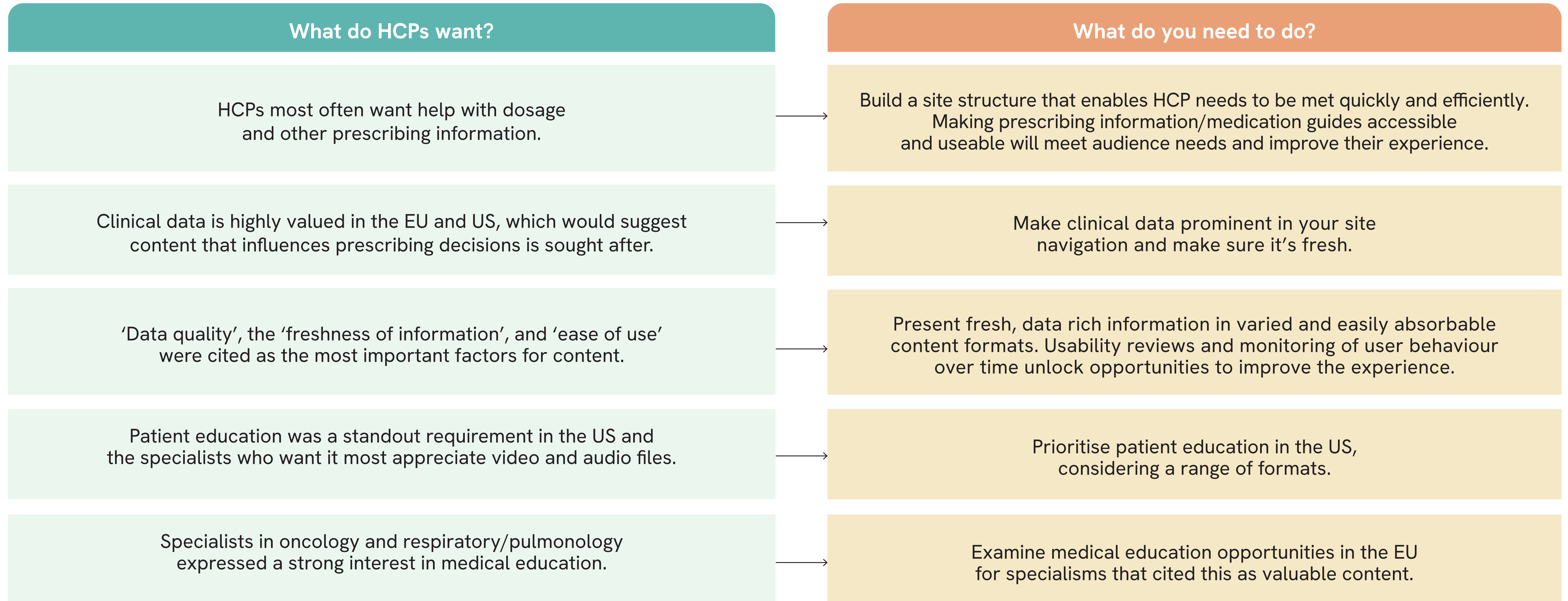


Independence from the pharma industry does not appear to be a primary focus for HCPs in the EU or the US, coming only 5th in terms of desirability in both cases.



Oncologists, rheumatology and respiratory/pulmonology specialists cited medical education as valuable, in stark contrast to most other specialisms.

How can we better meet HCPs needs on pharma-owned websites?



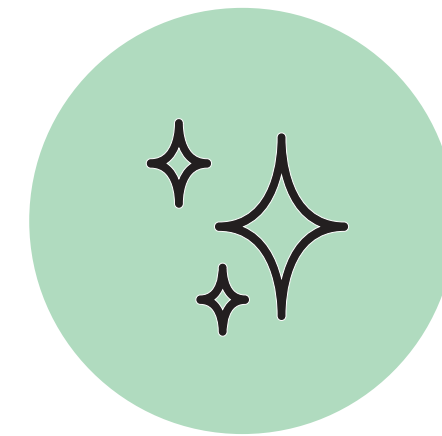
Methodology



Survey design and launch
via Google Survey



Data collection* of c.2,000
self-identified HCPs across
6 markets



Cleaning data to ensure
only high quality and
relevant responses



Analysing 1,042 responses
across different locations
and medical specialisms

* Data collection run in April 2022.

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