Pharma Messaging Effectiveness: Cross-Channel Analysis
Methodology

Sample

Recruited participants ages 18+ who visit a healthcare provider at least once per year

- Nationally representative across age, gender, and region
- Total N = 1,517

Online Interviews

We ran a survey to uncover:

- How patients seek and come to trust health information
- POV on experience in receiving pharma messaging through various channels
- Identify messaging preferences for Rx medication
The channels we examined

Participants randomized to one of five channels based on how they are typically exposed to pharma messaging
Despite the wealth of available resources, HCPs remain the go-to source for health information

<table>
<thead>
<tr>
<th>Go-to sources people use for trusted health information: % Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>HCPs</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>55%</td>
</tr>
</tbody>
</table>

Q: Where do you turn for your go-to trusted health information? Tell us about the websites, apps, or healthcare pros that you use when it comes to health information. Total N = 1,517
Despite differences in overall trust levels, HCPs are consistently the most trusted source for health information across generations.

Top two trusted sources for health info, by generation: % Highly trust/trust

- HCPs
- Websites and online health portals (e.g., WebMD)

Superior trust in HCPs is consistent across generations.
A Peek Behind Closed Doors

Exploring the Purpose and Impact of Pharma Ads Across Channel Selection
The HCP’s office is considered vastly more suitable than traditional media for sharing medication info.

Q: What environments do you find most appropriate to receive information about prescription medication? Total N = 1,517

- HCP’s office: 84%
- On pharma websites: 40%
- During online browsing: 40%
- While watching TV: 27%
- On social media: 26%
In fact, messaging from sources outside the HCP’s office can be overwhelming.

Q: Now we’re going to ask you to reflect on your past experiences in receiving prescription medication information from [setting]. Overall, what do you think of the ads you see for prescription medication in [setting]?

Total N: HCP’s office N = 510; On social media N = 249; While watching TV N = 250; During online browsing N = 255

Pharma ads seen _________ is overwhelming, by setting: Indexed to Avg. (100)

- On social media: 117
- During online browsing: 107
- While watching TV: 103
- At HCP’s office: 74
Less is more when it comes to messaging online and on social media

Reasons why patients feel overwhelmed by ads for Rx medication, by setting

<table>
<thead>
<tr>
<th>Reason</th>
<th>During online browsing</th>
<th>On social media</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’ve seen these types of ads way too many times in this setting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have concerns about being able to afford the treatment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>They’re visually too busy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>They use complex medical terms that are challenging to understand</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have concerns about personal health info being discussed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Their content is distressing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>They trigger health anxieties I have</td>
<td></td>
<td></td>
</tr>
<tr>
<td>They convey too much information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I feel like I’m being forced to make a decision</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q: You mentioned feeling overwhelmed by the ads for prescription medication you see [in setting]. Could you tell us what specifically what makes you feel this way?

Total: During online browsing N = 112; On social media N = 110

Recommendation:
- Addressing cost on social media
- In all online spaces, set a cap on advertising frequency
People view the HCP’s office as the most appropriate, relevant environment to receive medication information.

Q: In what setting do you most prefer to receive information on prescription medication?
Total N = 1,517

Where patients prefer to receive information on Rx medication: % Selected

- 58% Prefer to receive info for Rx medication at the HCP’s office
**Recommendation**

**Align messaging strategies in the HCP’s office with channels preferred by different generations**

For example, pair Gen Z social media with HCP office messaging and pair Millennial HCP messaging with PC/mobile ads

<table>
<thead>
<tr>
<th>Most preferred settings to receive info on Rx medication, by generation:</th>
<th>% Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adult Gen Z</strong></td>
<td><strong>Millennials</strong></td>
</tr>
<tr>
<td>HCP's office</td>
<td>43%</td>
</tr>
<tr>
<td>On social media</td>
<td>19%</td>
</tr>
<tr>
<td>During online browsing</td>
<td>14%</td>
</tr>
<tr>
<td>On pharma company websites</td>
<td>14%</td>
</tr>
<tr>
<td>While watching TV</td>
<td>10%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>

Interestingly, Boomers who are a prime audience for health care brands have very low preference for TV ads.
A multitude of factors drive trust of ads in the HCP’s office, including clear, rich info endorsed by experts

Social media benefits from communicating transparency. While TV benefits from conveying educational information, clarity of messaging needs improvement

Reasons why patients trust ads in _______

- The information they convey is educational
- The information they provide is clear
- Are endorsed by reputable healthcare professionals or experts
- The message is clear in what next steps I should take
- Are transparent in their potential side effects, risks and/or alternatives
- The companies being advertised are reputable
- Their message is consistent with messaging I’ve received elsewhere
- The patient stories shared in the ads make them more relatable

Q: You’ve mentioned finding the information in ads you’ve seen for prescription medication [at the HCP’s office/on pharma company’s website] as trustworthy, and we’re keen to learn the reasons why you feel this way. Please choose from the options below that best support your reasoning. Total: HCP’s office N = 290; While watching TV N = 117; On social media N = 135
Messaging in the HCP’s office is as personalized as it gets—carefully crafted by someone who cares

“[My doctor] is the most helpful and important person in my life. She informs me of what medications I should be taking.”

“This is where they know me, my past, my meds, and goals. This is the ideal place to learn new stuff.”

“They know me personally and I trust their knowledge of the medication I am taking.”

“My provider knows me and we have a history. She knows my medical problems, listens to me and cares about me.”

Total N = 1,517

HCP office provides information that is most relevant to me (% Selected)
The HCP’s office is a catalyst for inspiring action and motivating people to take next steps

% Selected

- HCP’s office
- On social media
- During online browsing
- On pharma company websites
- While watching TV
- Other

While watching TV

On social media

During online browsing

On pharma company websites

While watching TV

Other

Q: Which setting best applies to the attributes listed below?

Total: Adult Gen Z N = 81; Millennials N = 204; Gen X N = 231; Boomers N = 297

- The HCP’s office is far and away the most powerful touchpoint for Boomers.

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Elevate trust in the HCP’s office, shape brand perceptions online, and leverage TV and socials to communicate potential savings

What channels work best to communicate critical information for Rx medication?

<table>
<thead>
<tr>
<th>Highest scoring channel(s) for listed action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspire patients into action</td>
</tr>
</tbody>
</table>

| HCP’s office | | | | | | |
| While online browsing | | | | | | |
| On social media | | | | | | |
| While watching TV | | | | | | |

Q: Overall, what do you think of the ads you see in [setting]?
Q: How trustworthy do you find the information conveyed in the ads for prescription medication you see [in setting]?
Q: You mentioned you’ve been inclined to initiate a conversation about prescription medication you’ve seen ads for [in setting]. What’s driven this motivation?

Total: HCP’s office N = 510; On social media N = 249; While watching TV N = 250; During online browsing N = 255
Key takeaways

1 Work with trusted partners

Trust in HCPs creates opportunities for targeted communication. Brands should prioritize HCP channels for message dissemination and engagement strategies, working with trusted point of care partners for effective brand communication.

2 Leverage the least overwhelming setting

Messaging delivered from the HCP’s office is least overwhelming for people. Brands should prioritize the HCP’s office as the preferred channel for conveying critical messaging on Rx medication to enhance effectiveness and reception.

3 Maximize impact through personalized messaging

Messaging in the HCP’s office is personalized and crafted with care. Brands should leverage the personalized and highly relevant nature of communication in the HCP’s office as a catalyst to inspire action.
Thank You