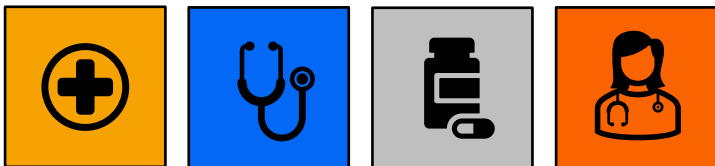# Methodology

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:
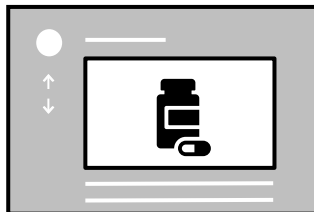
✓ How patients seek and come to trust health information

✓ POV on experience in receiving pharma messaging through various channels

✓ Identify messaging preferences for Rx medication

The channels we examined

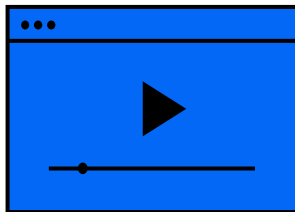Participants randomized to one of five channels based on how they are typically exposed to pharma messaging
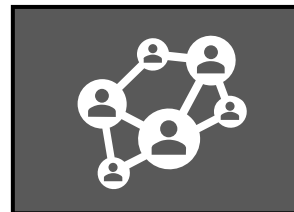

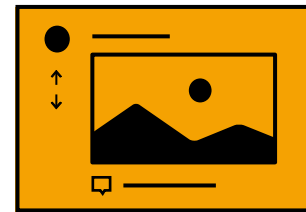At the healthcare provider's (HCP's) office

On pharma company's website

While watching TV (e.g., streaming or cable/satellite)

On social media (e.g., Instagram, TikTok, Facebook, etc.)

During online browsing (e.g., while shopping, searching for something, reading articles, etc.)

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Despite the wealth of available resources, HCPs remain the go-to source for health information

Go-to sources people use for trusted health information: % Selected

Source	%
HCPs	55%
Websites & online health portals	50%
Friends or family	29%
Health insurance providers	22%
Government health agencies	20%
Health and wellness blogs	16%
Social media	16%
Healthcare apps	15%
Educational institutions	14%
Online forums (e.g., Reddit)	11%
Printed materials	10%
Traditional media (e.g., TV, radio)	10%
Pharma company websites	9%
Podcasts and webinars	8%
Peer support groups	7%
AI generator	5%
Other	2%

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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)
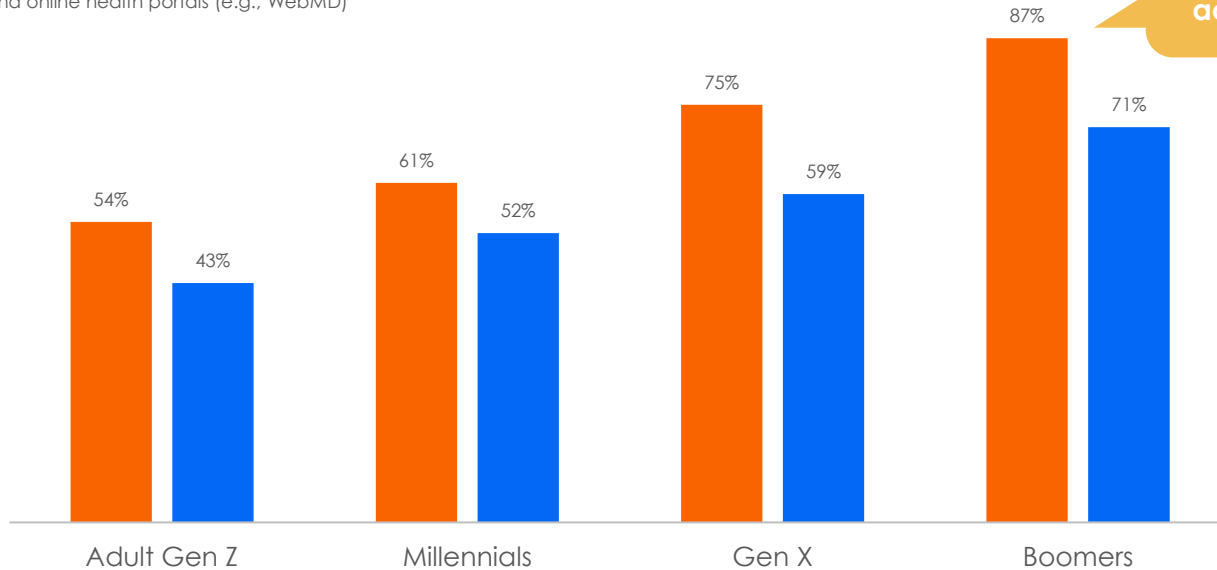
Superior trust in HCPs is consistent **across generations**

	Adult Gen Z	Millennials	Gen X	Boomers
HCPs	54%	61%	75%	87%
Websites and online health portals	43%	52%	59%	71%

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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

Settings patients find most appropriate to receive information on Rx medication: Net score

Setting	Score
HCP's office	84%
On pharma websites	40%
During online browsing	40%
While watching TV	27%
On social media	26%

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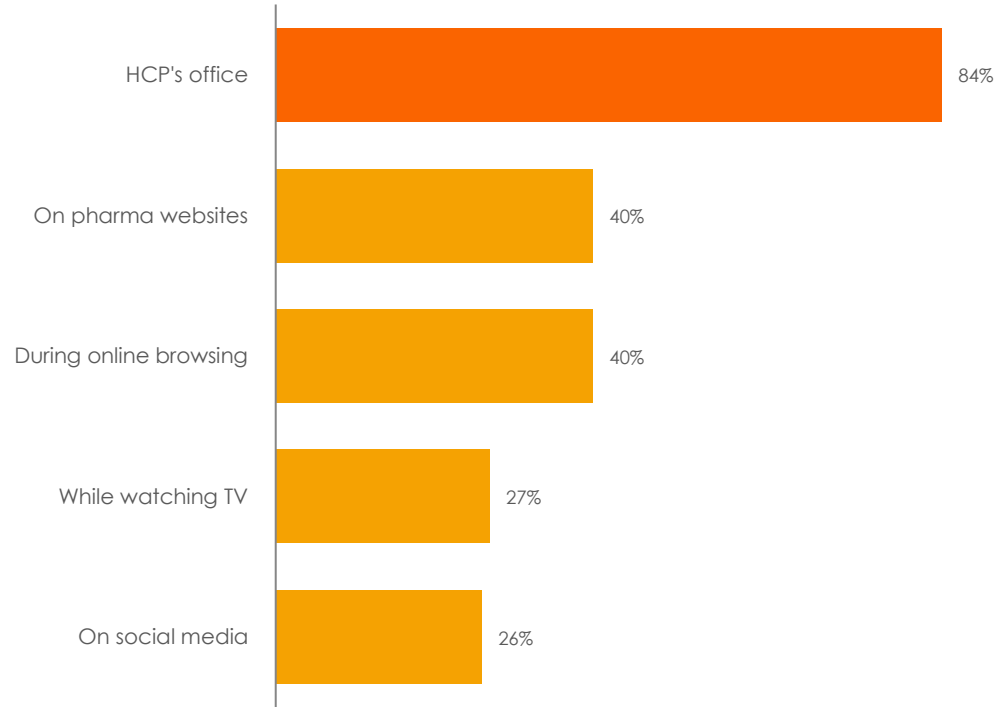
In fact, messaging from sources outside the HCP's office can be overwhelming

Pharma ads seen _____ is overwhelming, by setting: Indexed

Indexed to Avg. (100)   **ABOVE**

On social media	**117**
During online browsing	**107**
While watching TV	103
At HCP's office	74

Most overwhelming

Least overwhelming

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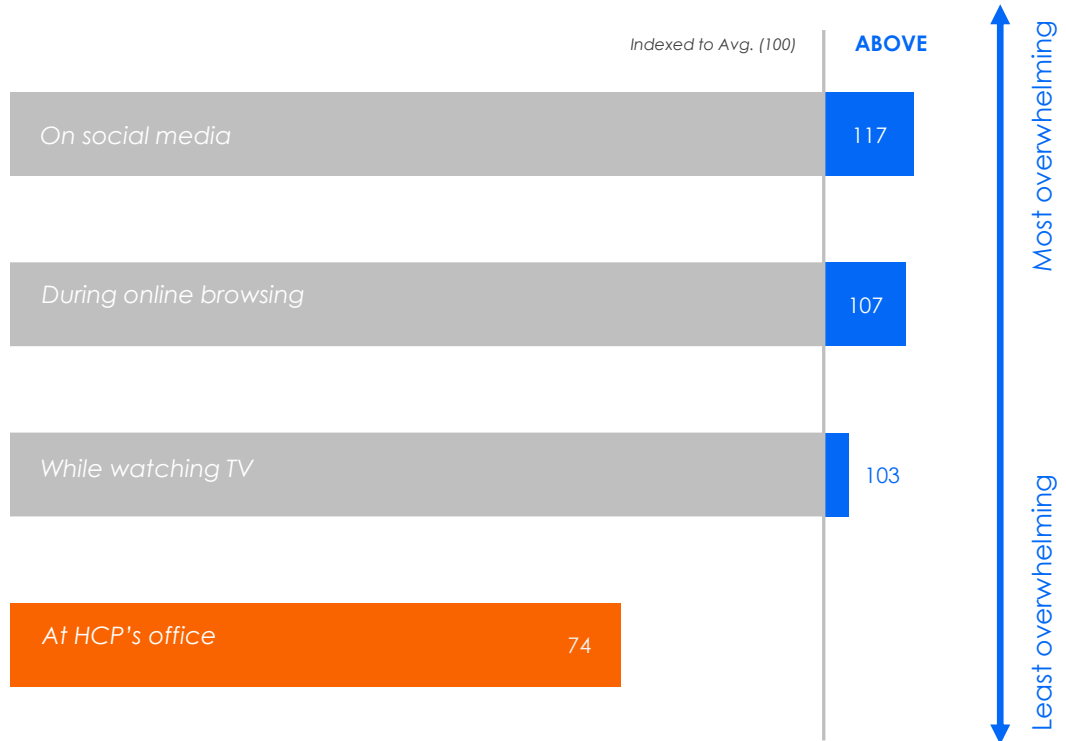
Less is more when it comes to messaging online and on social media

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

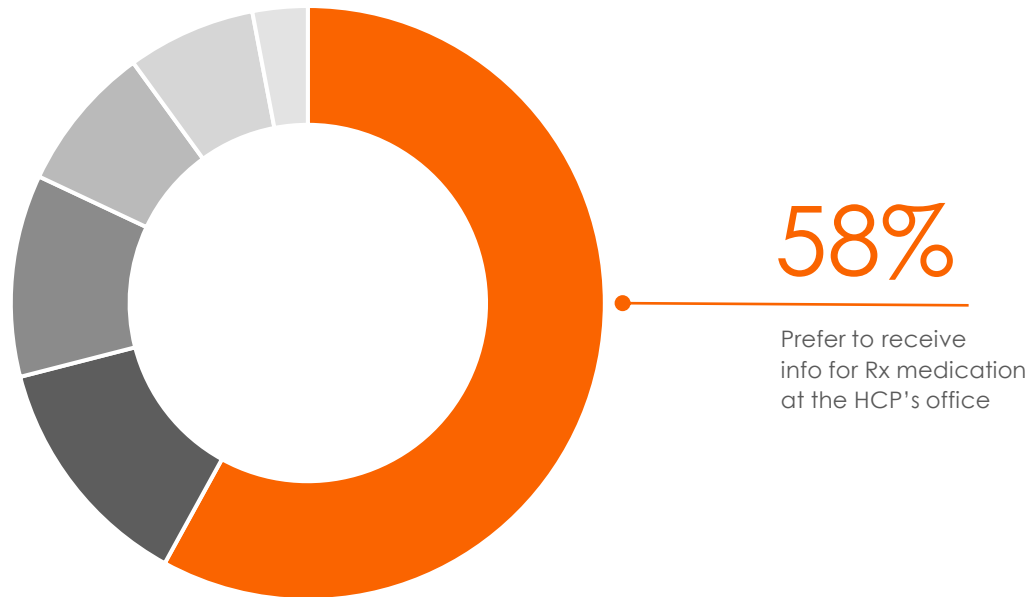|	During online browsing	On social media
I've seen these types of ads way too many times in this setting		
I have concerns about being able to afford the treatment		
They're visually too busy		
They use complex medical terms that are challenging to understand		
I have concerns about personal health info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

More → Less

Consider:

- Addressing **cost on social media**
- In all **online spaces, set a cap on advertising frequency**

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

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People view the HCP's office as the most appropriate, relevant environment to receive medication information

58%

Prefer to receive info for Rx medication at the HCP's office

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

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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

Most preferred settings to receive info on Rx medication, by generation:
% Selected

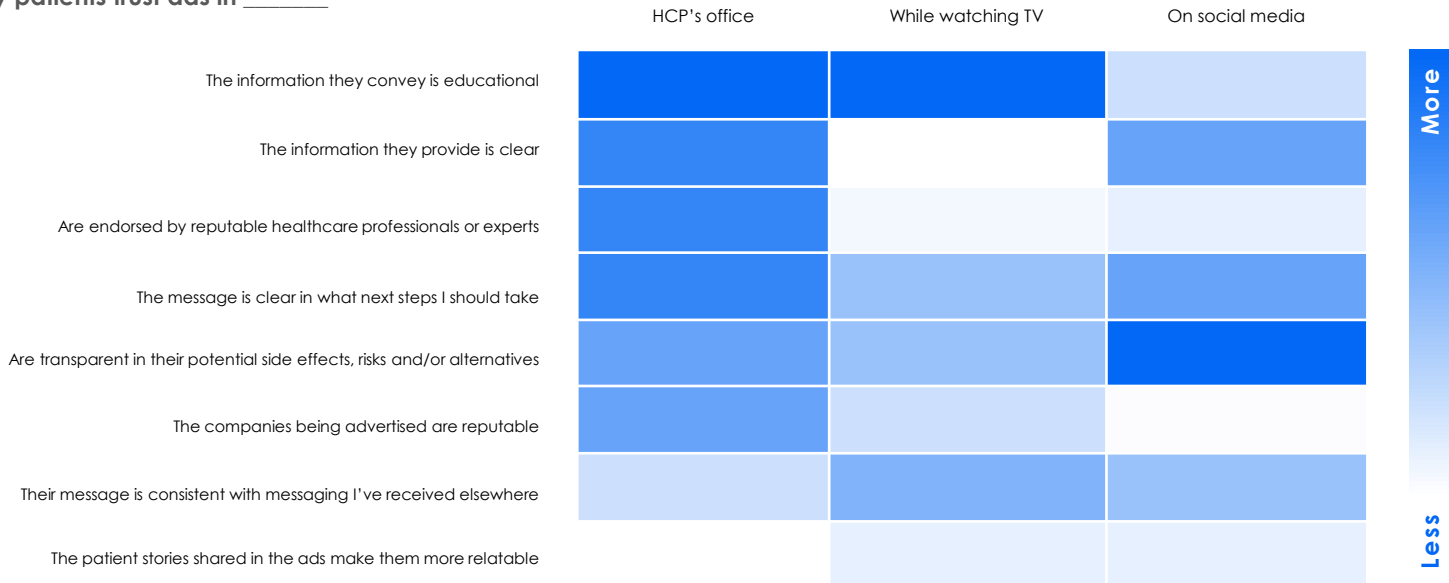● HCP's office ● On social media ● During online browsing ● On pharma company websites ● While watching TV ○ Other
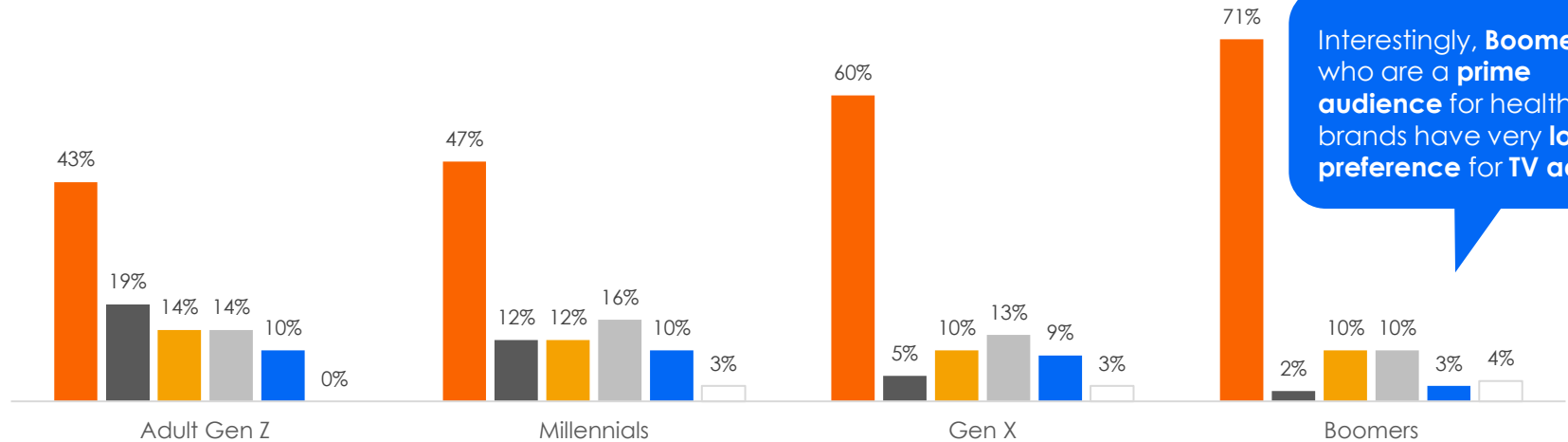
Interestingly, **Boomers** who are a **prime audience** for health care brands have very **low preference** for **TV ads**

Adult Gen Z: 43%, 19%, 14%, 14%, 10%, 0%

Millennials: 47%, 12%, 12%, 16%, 10%, 3%

Gen X: 60%, 5%, 10%, 13%, 9%, 3%

Boomers: 71%, 2%, 10%, 10%, 3%, 4%

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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 _____

	HCP's office	While watching TV	On social media
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			

More → Less

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

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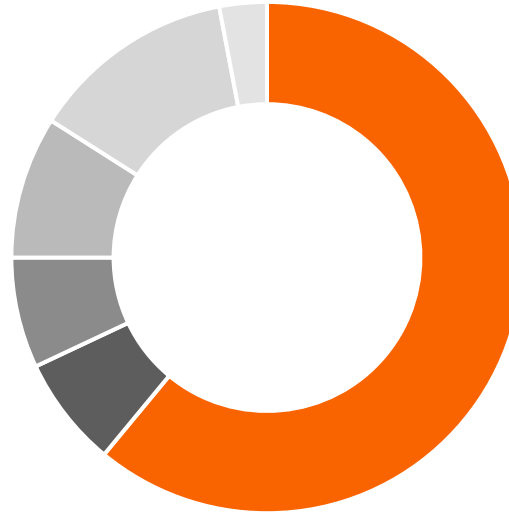
✓ "**This is where they know me, my past, my meds, and goals**. This is the ideal place to learn new stuff."

✓ "**They know me personally and I trust their knowledge** of the medication I am taking."

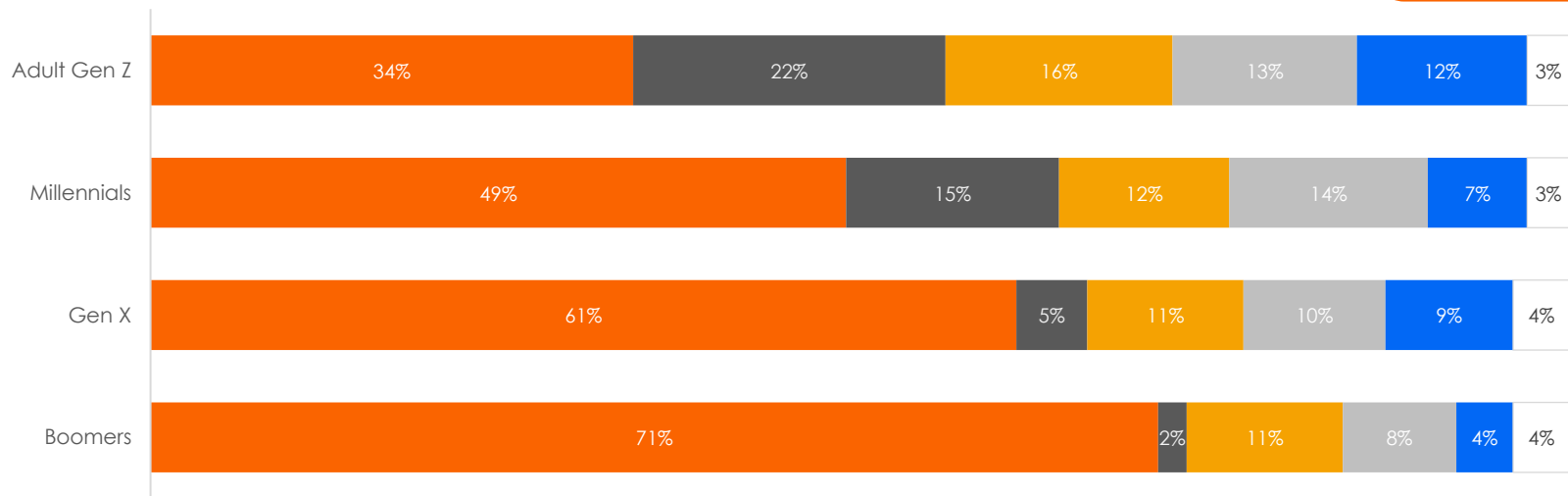✓ "My provider knows me and we have a history. **She knows my medical problems, listens to me and cares about me.**"

61%

HCP office provides information that is most relevant to me (% Selected)

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The HCP's office is a catalyst for inspiring action and motivating people to take next steps

_____ **is the setting most likely to inspire me to take next steps to ask about available medications:**

% Selected

● HCP's office ● On social media ● During online browsing ● On pharma company websites ● While watching TV ○ Other

	HCP's office	On social media	During online browsing	On pharma company websites	While watching TV	Other
Adult Gen Z	34%	22%	16%	13%	12%	3%
Millennials	49%	15%	12%	14%	7%	3%
Gen X	61%	5%	11%	10%	9%	4%
Boomers	71%	2%	11%	8%	4%	4%

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?

🔵 Highest scoring channel(s) for listed action

	Inspire patients into action	Facilitate trust	Communicate convenience of accessing Rx medication	Communicate Rx options/ alternatives	Shaping positive brand perceptions	Shaping brand credibility	Communicate savings info
HCP's office	🔵	🔵	🔵				
While online browsing			🔵	🔵			
On social media					🔵	🔵	🔵
While watching TV							🔵

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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

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Thank You