

A CONSUMER SURVEY COMMISSIONED BY DOCTOR.COM

# Digital Patient Trends in Pharma 2019

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By facilitating the “last mile” of a patient’s journey to care, pharmaceutical and medical device companies can significantly boost patient and caregiver confidence in provider and brand selection.



## Introduction

The digital era has permanently transformed the patient journey as we know it. Patients conduct much of their care-seeking journey online, feeling more empowered than ever to play an active role in seeking the right treatment and care. They are much less dependent on doctor referrals and, instead, turn to the internet for authentic patient feedback as well as other critical data points.<sup>1</sup>

Today, people are researching medications and medical devices online long before they enter a doctor's office. But often the "path to treatment"

is riddled with many obstacles, including insurance issues, inaccurate or insufficient information on local specialists, and affordability.

To take a closer look at digital consumer trends in the pharma space, Doctor.com engaged a third-party research company to conduct a survey of more than 1,300 patients representing the US population. The study reveals that consumers rely on pharmaceutical brands for healthcare information and, in fact, *want* pharma brands to play a greater and much more active role in the new patient journey.

<sup>1</sup> CX Trends in Healthcare 2018

The pharmaceutical industry spent over \$6.4 billion<sup>2</sup> last year on advertising alone but historically invests very little beyond patient awareness and education. Consumers are looking to pharmaceutical brands not only for product information but also for assistance in finding local treatment and care.

In the following report, you will find key takeaways for how brands can fill a major gap in the current healthcare landscape, improving patient trust and loyalty while also accelerating business goals.



**Over 70%** of patients have researched a prescription medication or medical device online in the past year.

<sup>2</sup> Nielsen 2018, Kantar Media 2018



REPORT HIGHLIGHTS

# The new digital path to prescription

**52%** rely on brand websites to research prescription information

**Most consumers** would prefer a digital appointment scheduling option\*

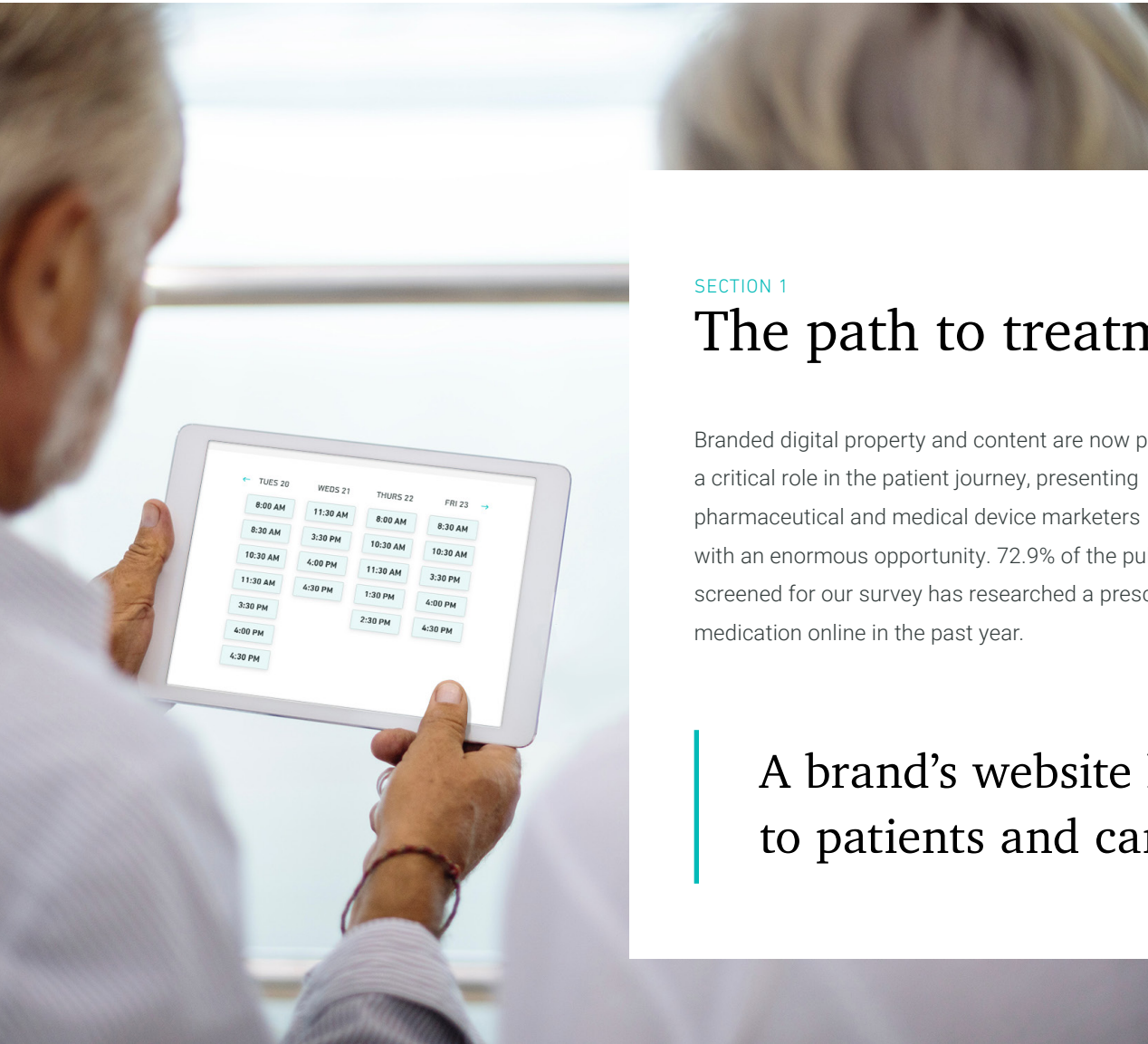
**63%** would download additional brand content after choosing a doctor\*

**88%** want pharma brand websites to feature a find-a-doctor directory

**81%** are more likely to use a brand website that has a doctor directory



\* Via a website's doctor directory



## SECTION 1

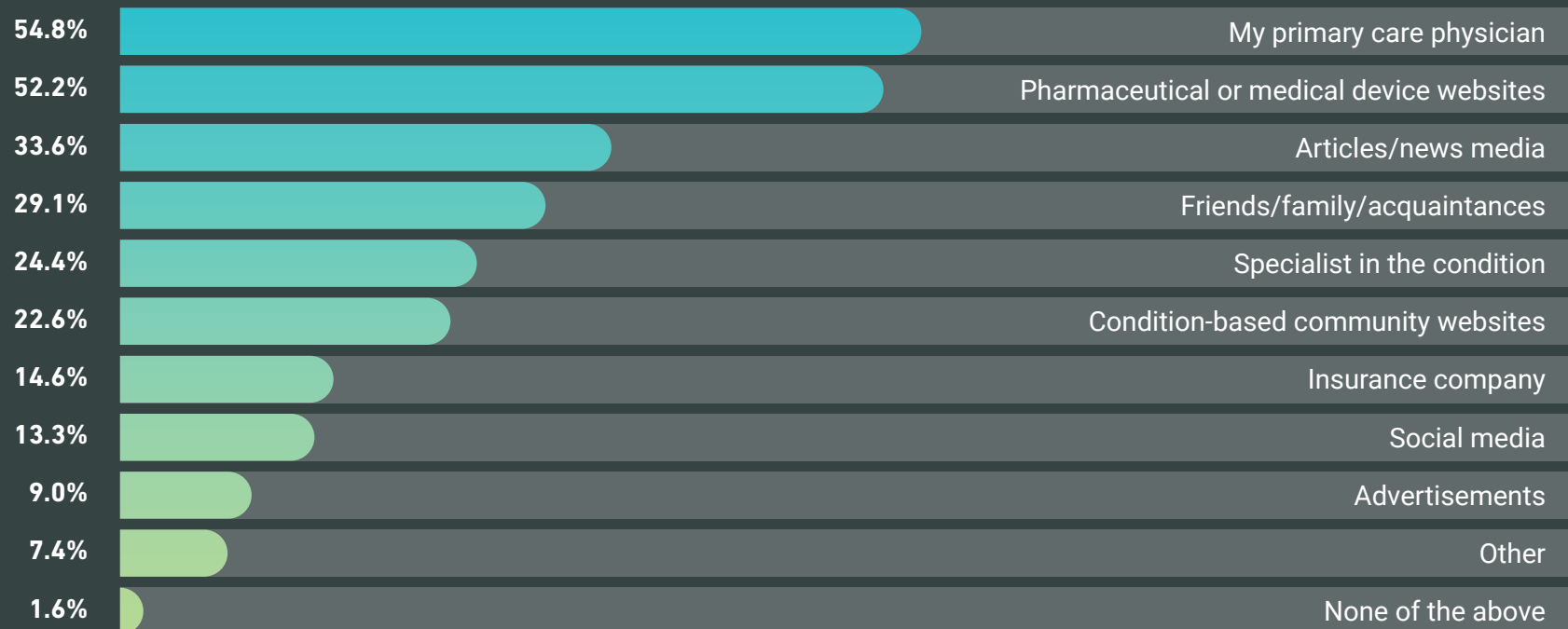
## The path to treatment begins online

Branded digital property and content are now playing a critical role in the patient journey, presenting pharmaceutical and medical device marketers with an enormous opportunity. 72.9% of the public screened for our survey has researched a prescription medication online in the past year.

Today, consumers rely on pharmaceutical brand websites almost as much as they do their primary care providers when it comes to researching information on medications and medical devices (52.2% vs. 54.8%, respectively) — indicating a major shift in patient preferences. News articles are the third-most used resource, with advertisements coming in last.

A brand's website has become a *critical* resource to patients and caregivers.

## How do you research prescriptions, medications, or medical devices? (Please choose all that apply.)



### KEY TAKEAWAY

Pharmaceutical websites act as a critical entry point for the patient journey and have the potential to deliver much more value along the entire journey.



## SECTION 2

# The “last mile” of the patient journey presents the most roadblocks

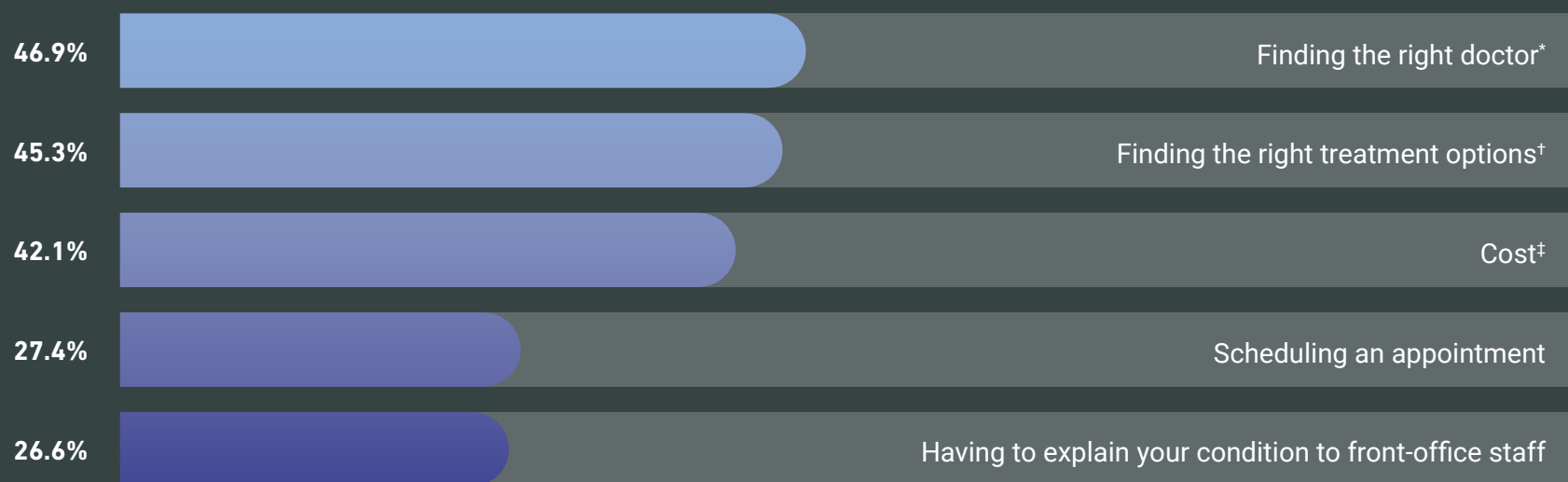
While consumers may feel empowered to research medication and treatment options independently, many have trouble making it past the discovery phase to find and procure the right treatment and care. In fact, respondents cite “finding the right doctor” as the #1 barrier to accessing treatment or medication — meaning patients struggle to locate qualified specialists to further educate, diagnose, and treat

their healthcare conditions. While these patients are ready and willing to appoint a doctor, many will lose their way.

This presents both a challenge and an unprecedented opportunity for pharmaceutical brands to help patients access treatment and improve adherence.

**Nearly half** of patients struggle to find the right doctor to access proper treatment.

What are the biggest challenges you face when trying to find a treatment or prescription for a medical condition? *(Choose all that apply.)*



#### KEY TAKEAWAY

Patients and caregivers aspire to take an active role in treatment, and they seek guidance from trusted sources. Pharmaceutical companies are able to make this easier by connecting them to up-to-date directories listing local doctors and specialists who can treat their specific conditions.

\* Someone who specializes in the condition, takes your insurance, speaks your language, and is within a reasonable travel distance

† Something that works for you

‡ Or finding a prescription covered by your insurance





## SECTION 3

## Bridging the gap between patients and providers can boost brand loyalty

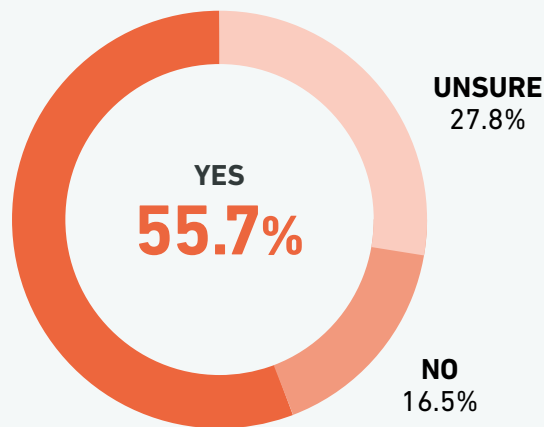
Consumers are now looking to pharma brands for the tools that will help them make more informed decisions about local providers.

Pharmaceutical companies can gain more consumer confidence and loyalty by bridging the gap between patients and physicians. Just shy of 90% of patients reported that they would be more likely to recommend a pharmaceutical site to others if it integrated a robust doctor directory that would help them learn

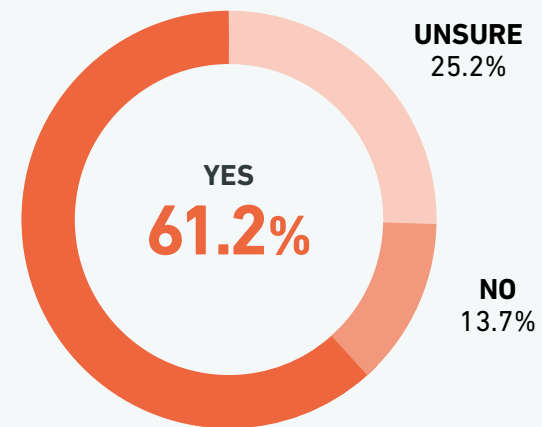
more about individual physicians before deciding on whom to see for treatment. Specifically, patients want to see doctor ratings from trusted sources as well as convenient ways to connect with providers directly from the directory experience. Furthermore, incorporating a find-a-doctor feature on a brand website would not only increase consumer loyalty to the *doctor* (61.2%), but more than half said it would also improve their loyalty to the *brand* (55.7%).

**56%** of consumers would be more loyal to a brand that had a doctor directory on its website.

If a pharmaceutical or medical device website had a **doctor directory** where you could find a doctor, see how other patients rated them, and book an appointment, **would that increase your loyalty to the brand or product?**



If you found a doctor via a website's **doctor directory**, where you could see how other patients rated them and book an appointment, **would that increase your loyalty to the doctor?**



#### KEY TAKEAWAY

By connecting patients and caregivers with the resources to find the right provider, pharmaceutical companies stand to make major gains in terms of consumer trust and loyalty.



#### SECTION 4

## Patients demand “good CX” from pharma

A good customer experience (CX) in pharma isn't just about what happens after a patient gets a prescription, but it's also delivering value at every touchpoint leading to the point of care and prescription.

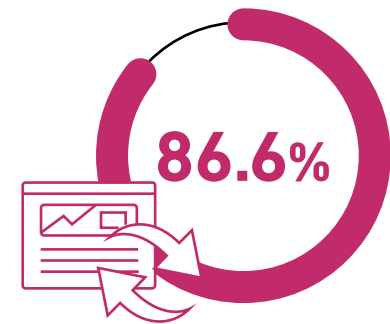
To help patients make the *best* decisions about their health, online directories should feature physician ratings from trusted third-party sources, as they're a make-or-break factor in patients' decision-making. Over 95% consider ratings important when choosing a new doctor, and most (86.6%) would find it helpful to have ratings visible in a doctor directory.

When it comes to the “last mile” of contacting a doctor, most people would prefer digital appointment scheduling through the find-a-doctor feature. Once a consumer has identified a doctor and is ready to appoint, 62.7% would likely download additional content (e.g., coupons, doctor discussion guides, etc.).

The online appointment event presents an opportune moment for pharmaceutical brands to engage patients with additional information and help improve doctor visitation and access to treatment.

**~90%** of consumers would find it helpful if brand websites featured doctor directories.

**88.3%** want pharma brand websites to connect them to providers.

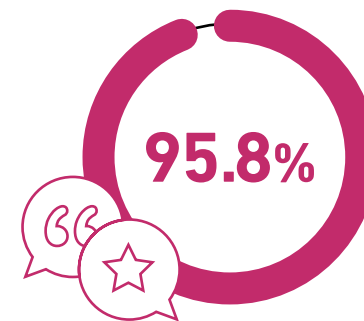


would find it helpful to check and compare doctor ratings on brand websites

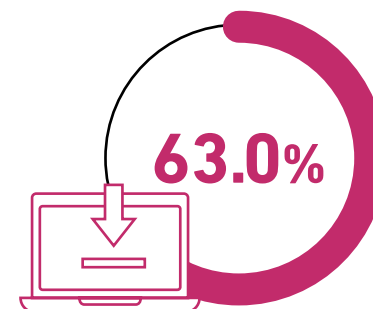
**Best-in-class pharma brands deliver value at every touchpoint of the patient journey.**



**81.3%** would be more likely to use or recommend sites with find-a-doctor directories.



think ratings are important to extremely important when choosing a new doctor



would download content when ready to schedule an appointment

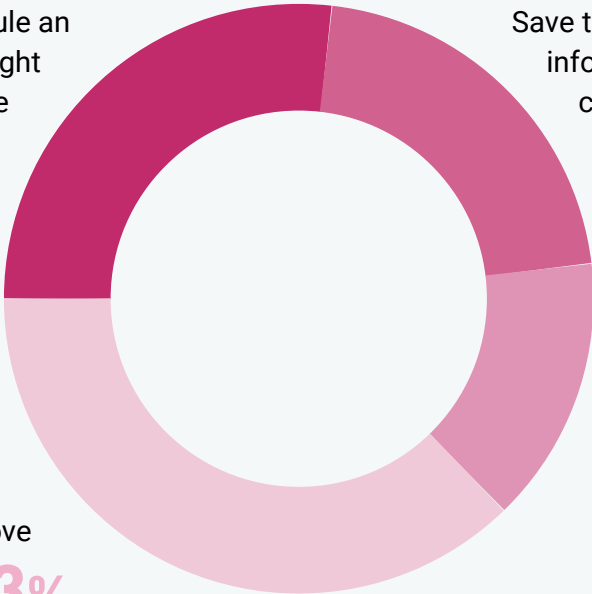
# How would you prefer to contact a doctor you find through a website's directory?

Schedule an appointment right on the website  
**26.8%**

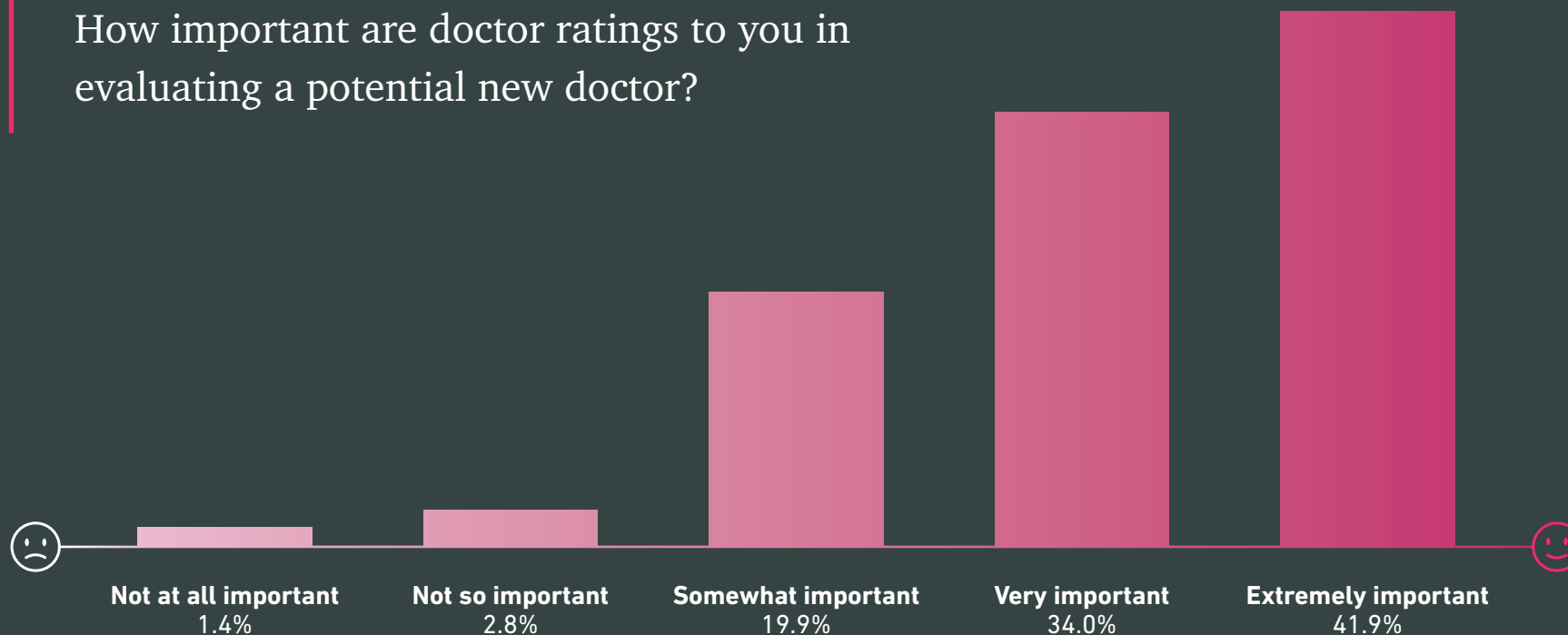
Save their contact information so you can call them later  
**21.2%**

Visit the doctor's website  
**14.7%**

All of the above  
**37.3%**



How important are doctor ratings to you in evaluating a potential new doctor?



#### KEY TAKEAWAY

Finding a doctor is perhaps the most critical segment of the patient or caregiver's journey. Pharmaceutical companies can fulfill a major part of this equation by leveraging digital tools to facilitate engagement.



## SECTION 5

## Boomers have embraced digital healthcare

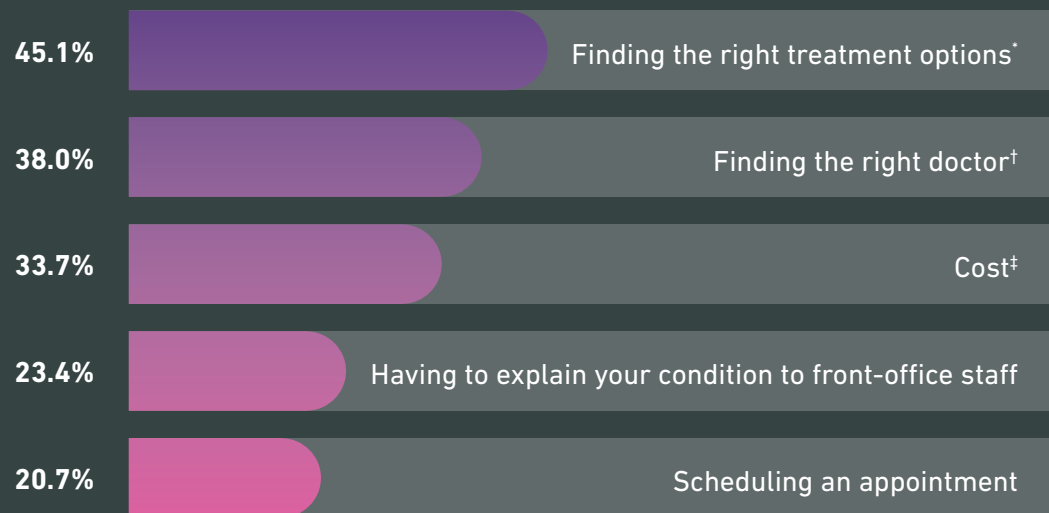
There's no doubt that the 60+ crowd is becoming more adept with digital technologies. More than half go directly to pharmaceutical sites to research medications or treatments, and nearly 80% report that they would find it helpful to access a doctor directory there. That's relatively on par with younger

respondents, including digital natives who are often charged with caring for aging parents as the boomer population gets older.

**Nearly 80%** of patients over 60 would find a doctor directory on a pharma brand site helpful.



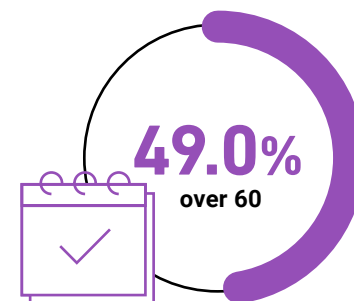
## What are the biggest challenges you face when trying to find a treatment or prescription for a medical condition?



RESPONDENTS OVER 60



think ratings and reviews are important to extremely important when choosing a new doctor



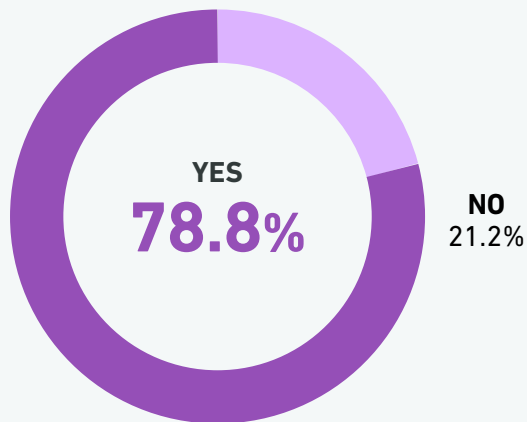
want the option to schedule an appointment online

\* Something that works for you

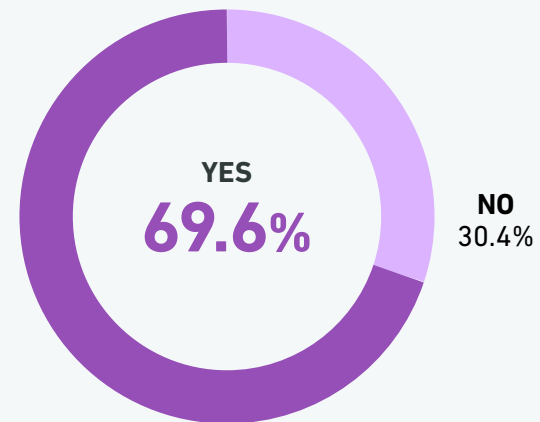
† Someone who specializes in the condition, takes your insurance, speaks your language, and is within a reasonable travel distance

‡ Or finding a prescription covered by your insurance

**Would you find it helpful if the brand website had a directory** where you could find a doctor who treats the condition you or someone in your care suffer from?



**If a brand website could connect you with a specialist** who treats your specific condition, would you be more likely to use or recommend the site to others?



RESPONDENTS OVER 60

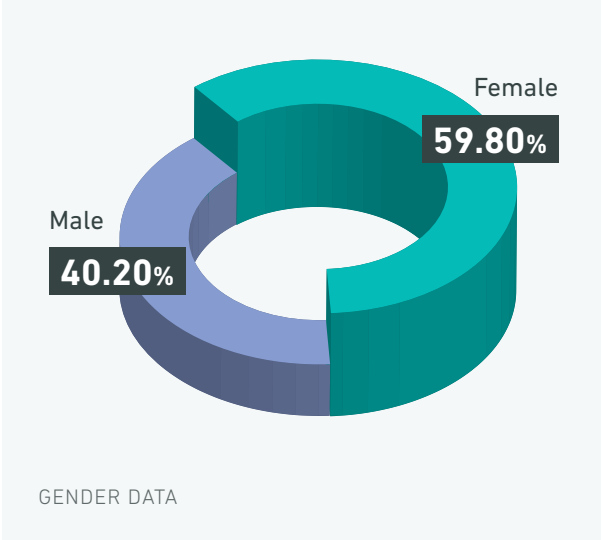
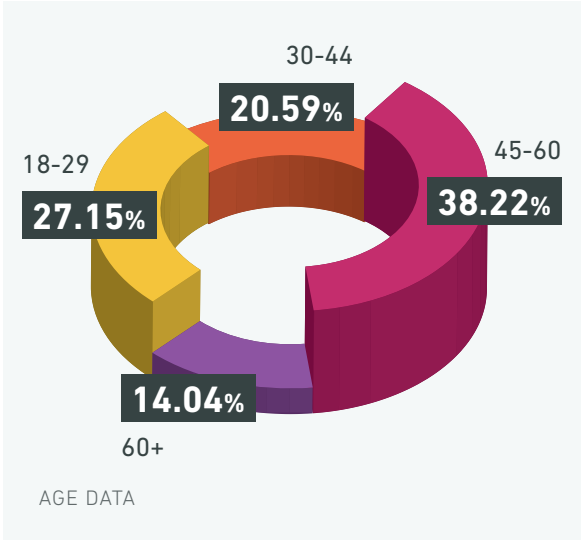
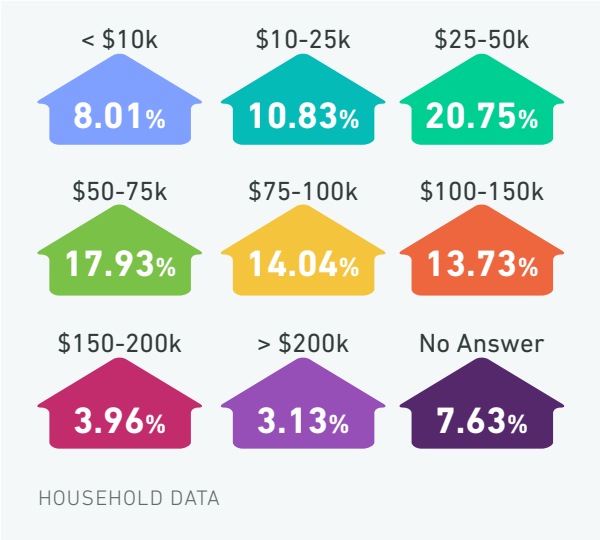
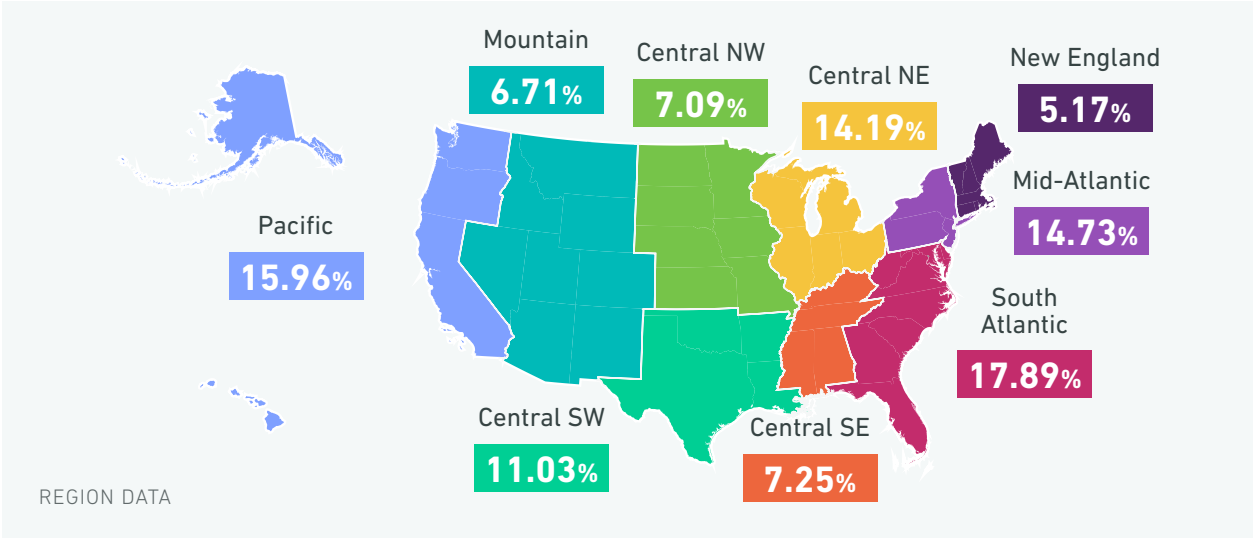
#### KEY TAKEAWAY

Less “digital divide” exists between older and younger generations than people think. Pharmaceutical companies would be wise to invest in digital tools to reach and engage patients and caretakers of all ages.

CLOSING

# About the survey

**Survey methodology:** This survey depicts findings from 1,300+ respondents who represent the US adult census demographic of regions, incomes, and genders, age 18 to 60+. Research was commissioned by Doctor.com and conducted through a third-party market research agency during August and September of 2019.





WHO WE ARE

## About Doctor.com

Doctor.com empowers healthcare organizations to deliver a better customer experience at every step of the patient journey. Doctor.com's single platform offers best-in-class provider data, powers direct physician-to-patient engagement, and features integrations with the most prominent healthcare directories, search engines, social media platforms, and EHR/PM systems. As a result, thousands of clients, including leading brands in the life sciences industry, 200+ leading hospitals and health systems, and 30,000+ private practices, have been empowered by the platform to enhance their digital presence and credibility, increase patient trust, and grow their business.



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