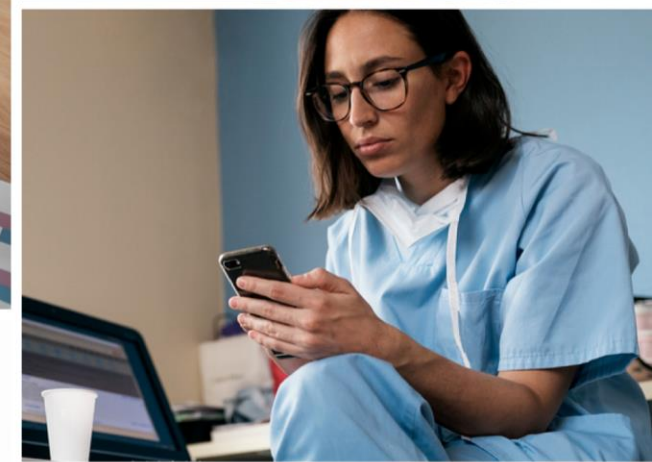
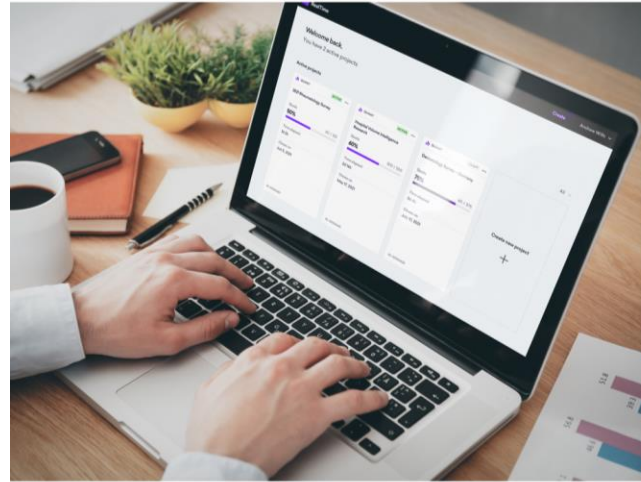
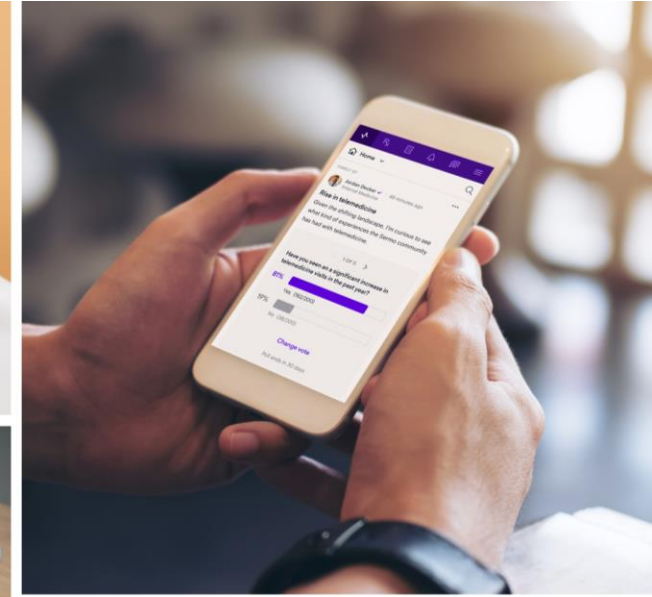
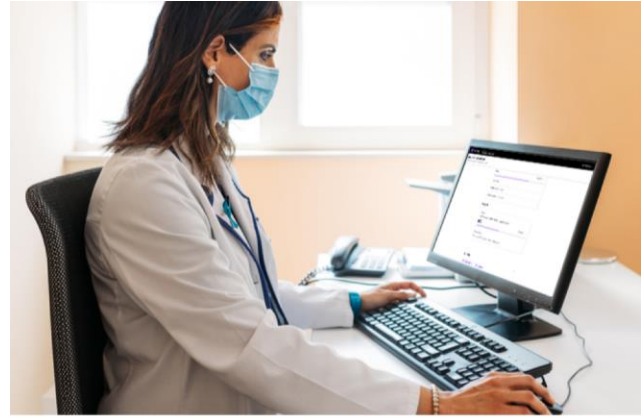


HCP SENTIMENT PART 15

The “Influence of Influencers”

October 2024

sermo



Research sample overview

Report insights are fueled by Sermo's proprietary RealTime technology, used to survey n=1,010 Physicians in Europe, APAC and North America to participate in a 10-minute quantitative online survey.

COUNTRY	SAMPLE
United States	317
Spain	106
Italy	101
United Kingdom	101
Germany	98
France	97
Canada	95
Japan	50
China	45
TOTAL	1,010

SPECIALTY GROUP	SAMPLE
General / Family Practice	133
Endocrinology	109
Cardiology	106
Oncology	99
Neurology	97
Dermatology	96
Psychiatry	93
OBGYN	89
Ophthalmology	72
Gastroenterology	71
Allergy & Immunology	45
TOTAL	1,010

Report Objectives



Learn **what makes a trusted healthcare “Influencer”**



Understand the impact creators have on physician perception and decision-making



Share tips to **supercharge and streamline** your influencer strategy

Meet the modern-day healthcare content creator



sermo

Content creators are not one-size-fits-all

There is a wide spectrum from micro-influencers and rising stars to established opinion leaders

MICRO INFLUENCERS



Dr. Austin Chiang

- *Interventional GI educating about rare gastrointestinal diseases*
- *90k followers on Instagram*
- *Chief Medical Officer for Medtronic*

DIGITAL OPINION LEADERS



Dr. Glaucomflecken

- *Ophthalmologist*
- *TikTok influencer with 2.3M followers*

KEY OPINION LEADERS



Dr. Narjust Florez

*Associate Director of the Cancer Care Equity Program and Assistant Professor of Medicine
Dana-Farber Cancer Institute*

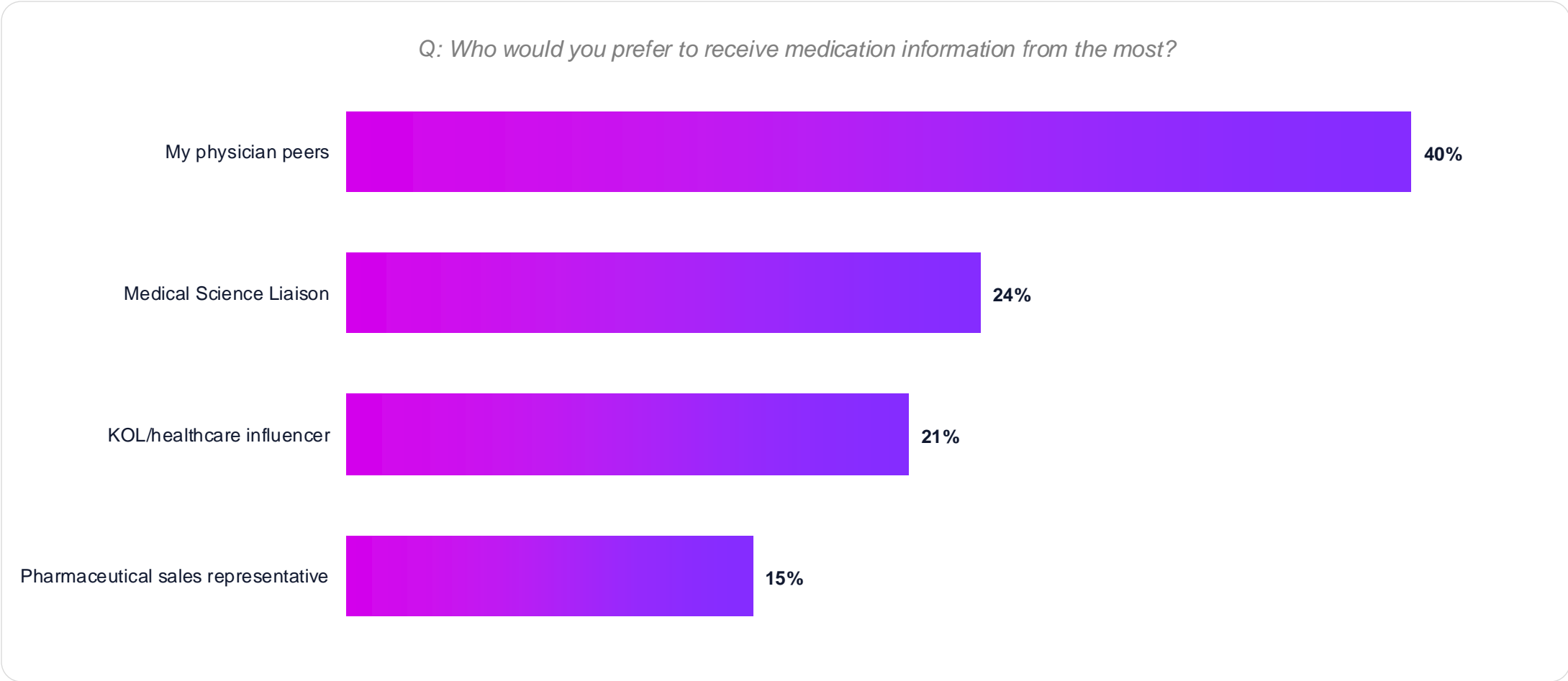
CELEBRITIES



Serena Williams

for Ubrelvy

40% of physicians prefer to receive medication information from their peers



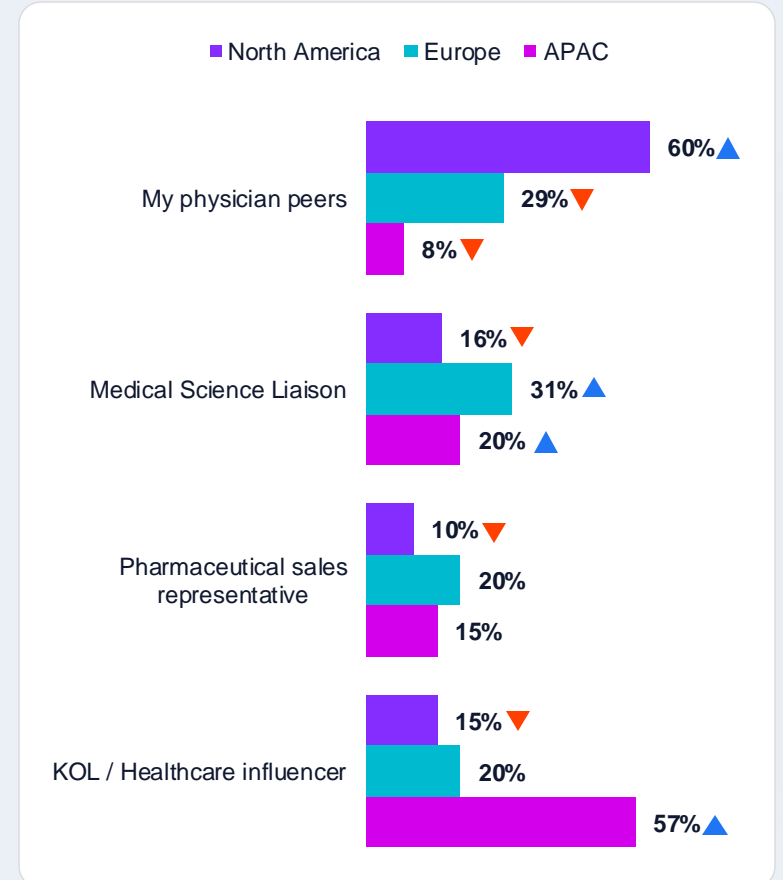
Specialty & Region Summary

Q. Who would you prefer to receive medication information from the most?

SPECIALTY SUMMARY

	Overall	Allergy & Immunol.	Card	Derm	Endo	Gastro	GP / FP	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
My physician peers	40%	49%	35%	46%	27%	44%	47%	42%	49%	29%	31%	44%
Medical Science Liaison	24%	27%	24%	23%	▲ 36%	20%	21%	22%	26%	21%	18%	24%
Pharma. Sales representative	15%	9%	18%	14%	14%	14%	14%	13%	15%	17%	▲ 28%	13%
KOL/ Healthcare influencer	21%	16%	24%	18%	24%	23%	18%	23%	10%	▲ 32%	24%	19%

REGION SUMMARY



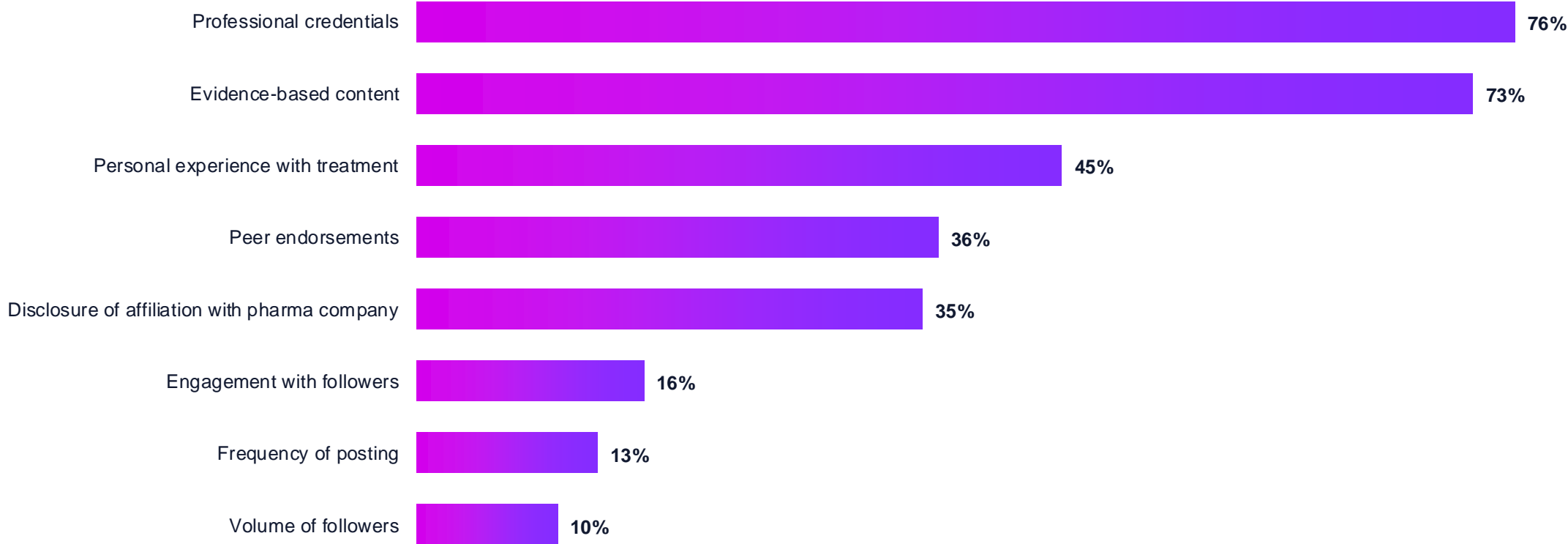
▲ Significantly higher than Global at 95% confidence level

▼ Significantly lower than Global at 95% confidence level

Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America 7

According to physicians, professional credentials & evidence-based content is what makes a KOL credible

Q: In your opinion, what makes a healthcare influencer or KOL credible?



Specialty Summary

Q. In your opinion, what makes a healthcare influencer or KOL credible?

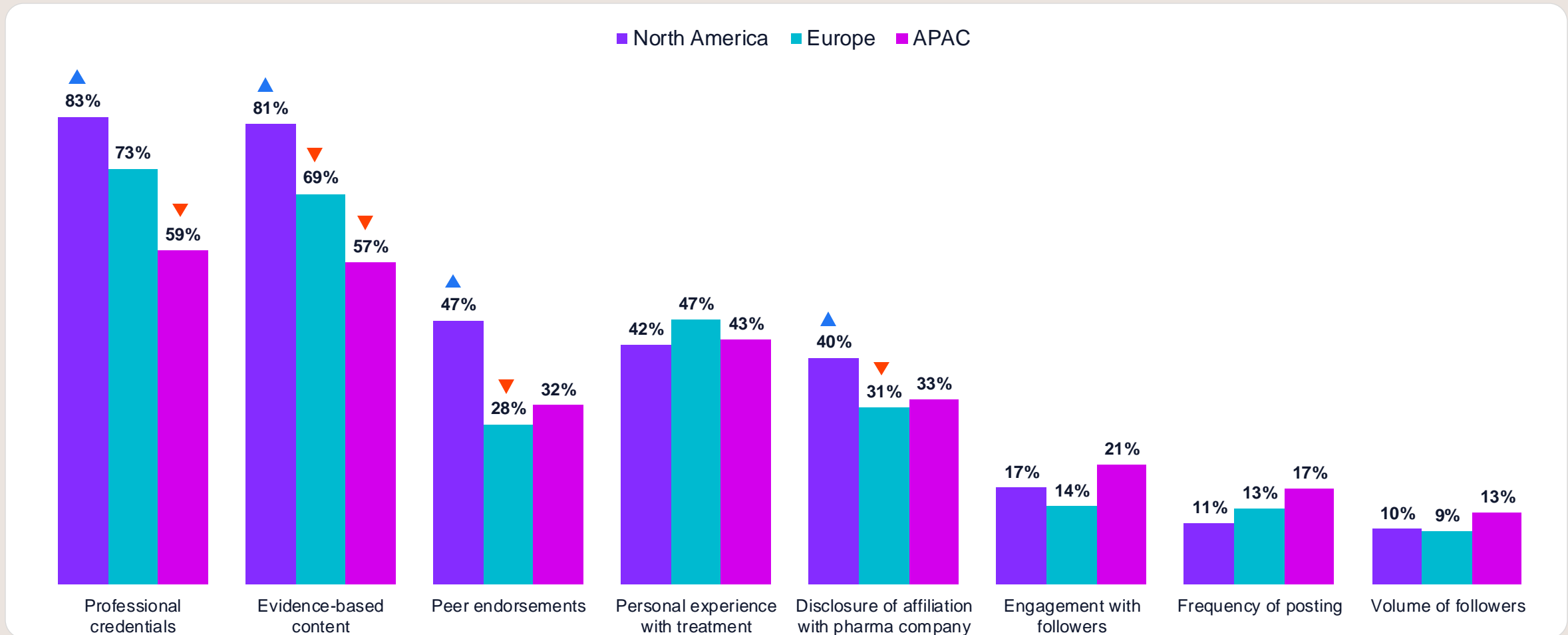
	Overall	Allergy & Immunology	Card	Derm	Endo	Gastro	General / Family Practice	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
Professional credentials	76%	84%	73%	78%	73%	77%	▲ 83%	69%	76%	▼ 67%	74%	81%
Peer endorsements	36%	38%	31%	39%	30%	45%	38%	34%	30%	37%	▲ 47%	33%
Disclosure of affiliation with pharma company	35%	47%	26%	39%	35%	38%	34%	34%	39%	31%	35%	35%
Personal experience with treatment	45%	51%	49%	▼ 33%	▼ 31%	48%	50%	40%	48%	40%	▲ 61%	45%
Evidence-based content	73%	80%	72%	67%	65%	76%	80%	67%	▲ 82%	68%	68%	81%
Frequency of posting	13%	7%	12%	16%	14%	14%	17%	9%	11%	17%	6%	10%
Engagement with followers	16%	13%	17%	14%	17%	17%	19%	11%	13%	20%	17%	13%
Volume of followers	10%	7%	11%	7%	9%	11%	9%	8%	10%	10%	14%	11%

▲ Significantly higher than Global at 95% confidence level

▼ Significantly lower than Global at 95% confidence level

Region Summary

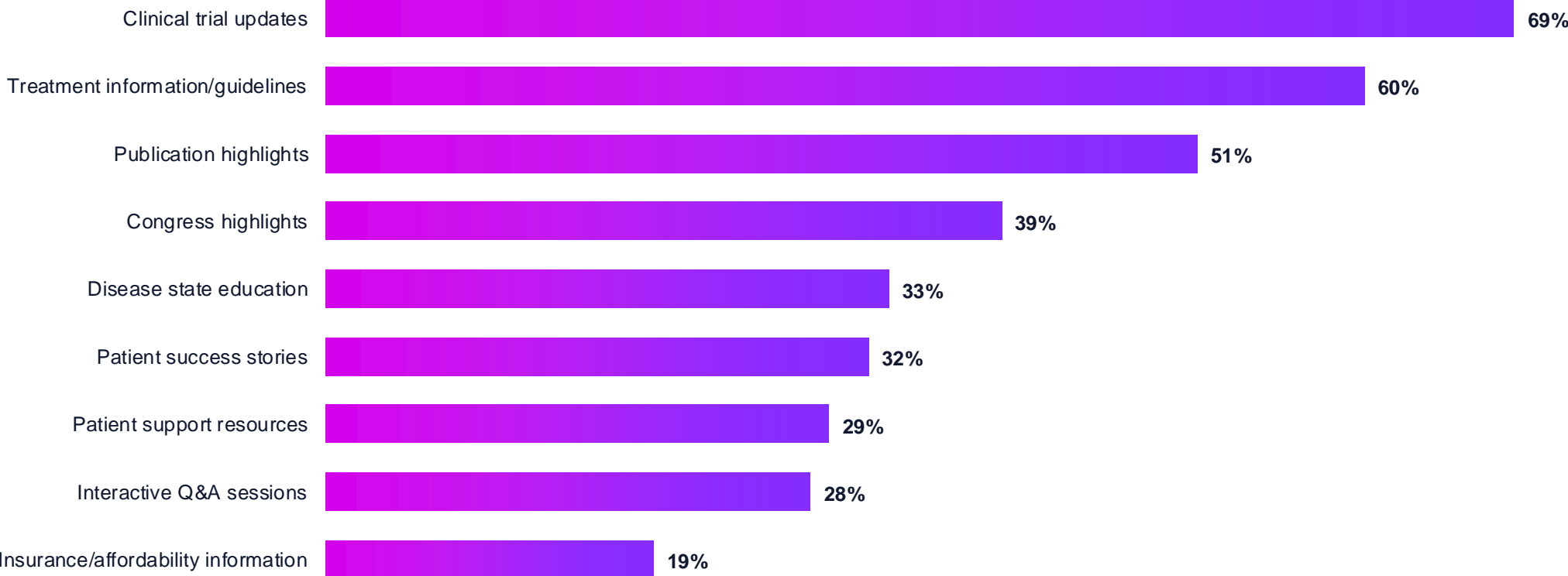
Q. In your opinion, what makes a healthcare influencer or KOL credible?



▲ Significantly higher than Global at 95% confidence level
▼ Significantly lower than Global at 95% confidence level

When receiving information from KOL collaborations with pharma companies, physicians would like to get clinical trial updates & treatment information

Q: What kind of content would you like to receive from influencers or KOL collaborations with pharmaceutical companies?



Specialty Summary

Q. What kind of content would you like to receive from influencers or KOL collaborations with pharmaceutical companies?

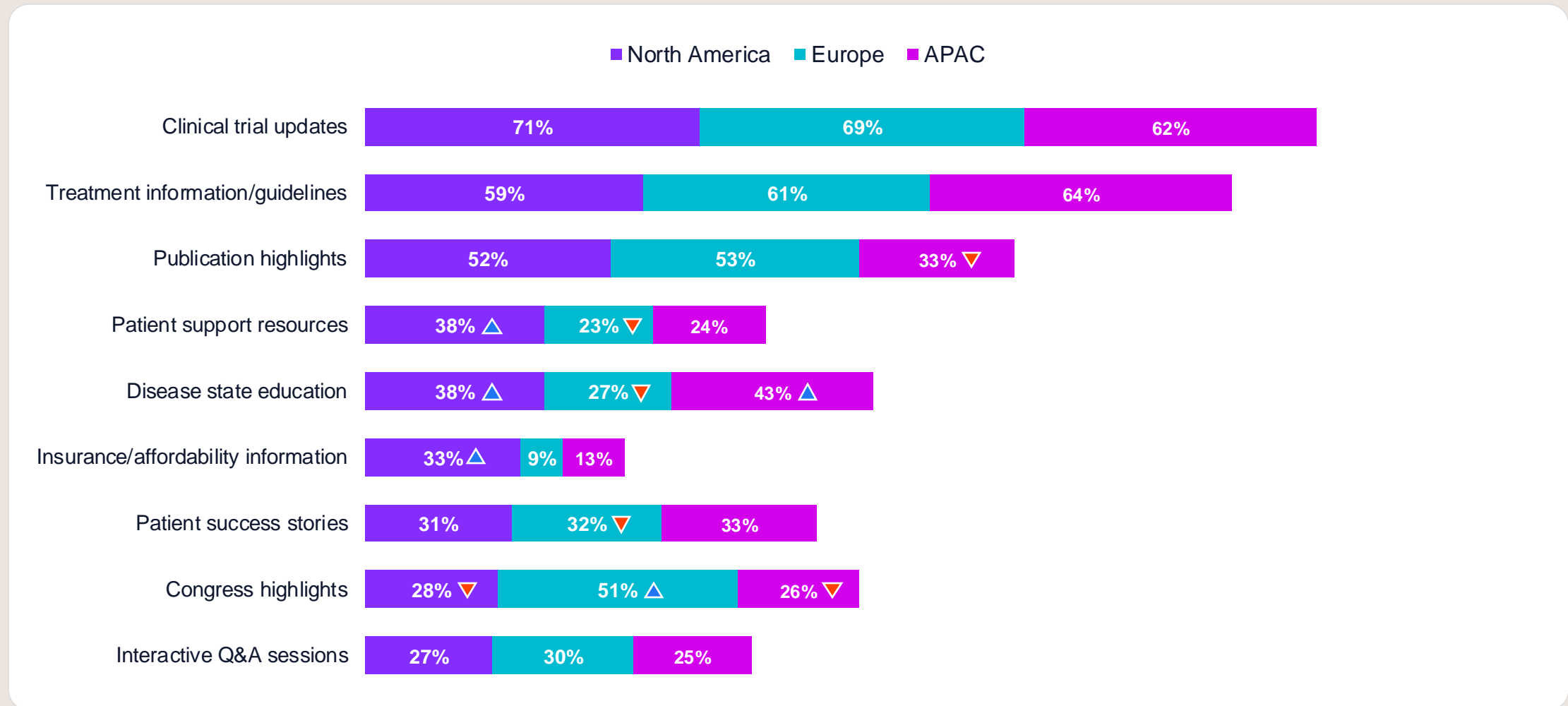
	Overall	Allergy & Immunology	Card	Derm	Endo	Gastro	General / Family Practice	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
Clinical trial updates	69%	▼ 53%	▲ 78%	64%	70%	73%	70%	▼ 58%	74%	▲ 79%	68%	65%
Treatment information/guidelines	60%	60%	63%	54%	63%	62%	65%	56%	61%	▼ 51%	65%	65%
Publication highlights	51%	58%	48%	47%	53%	45%	50%	44%	55%	57%	43%	59%
Congress highlights	39%	51%	41%	31%	41%	41%	32%	▲ 49%	36%	▲ 48%	38%	31%
Disease state education	33%	44%	25%	33%	37%	41%	39%	30%	22%	27%	35%	33%
Patient success stories	32%	33%	31%	36%	17%	31%	▲ 42%	29%	28%	27%	35%	37%
Patient support resources	29%	36%	▼ 18%	28%	32%	31%	33%	24%	▲ 43%	24%	21%	35%
Interactive Q&A sessions	28%	22%	23%	22%	31%	30%	32%	24%	26%	28%	38%	34%
Insurance/affordability information	19%	18%	13%	18%	20%	27%	▲ 27%	▼ 10%	19%	16%	18%	23%

▲ Significantly higher than Global at 95% confidence level

▼ Significantly lower than Global at 95% confidence level

Region Summary

Q. What kind of content would you like to receive from influencers or KOL collaborations with pharmaceutical companies?

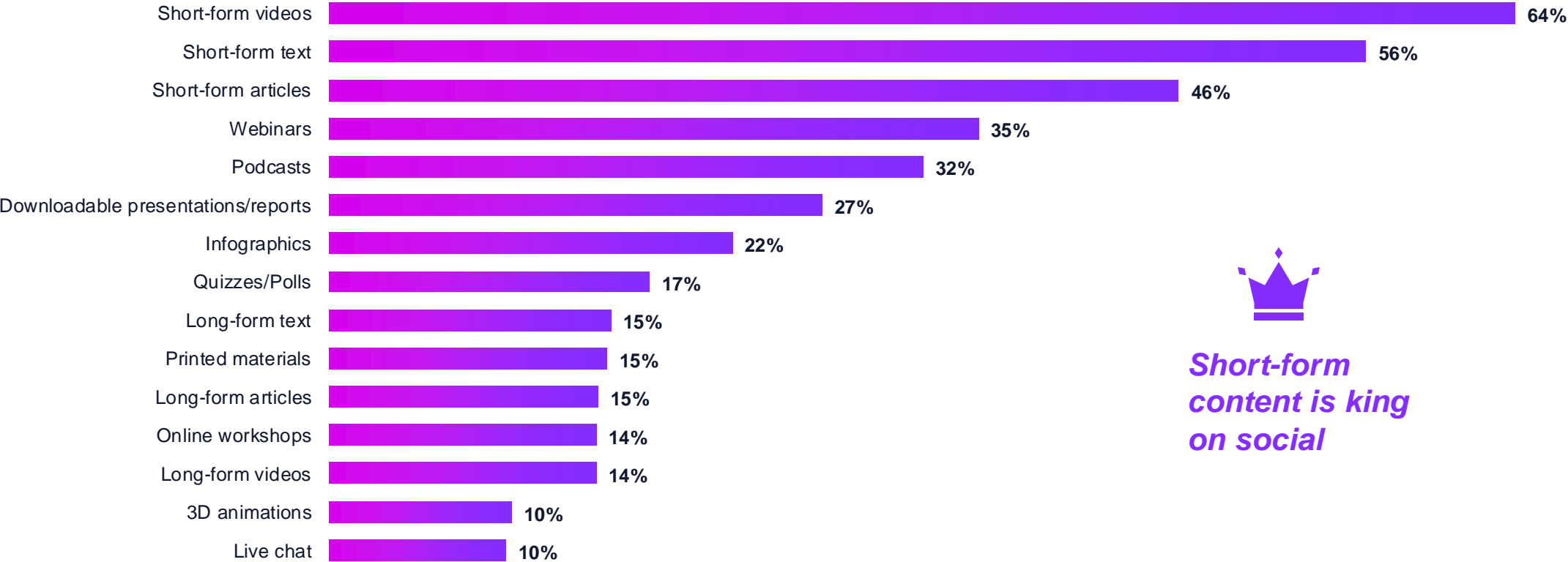


▲ Significantly higher than Global at 95% confidence level

▼ Significantly lower than Global at 95% confidence level

Short-form videos are physicians' most valued format of social content

Q: Which format of social content created by healthcare influencers or KOLs do you find most valuable?



**Short-form
content is king
on social**

Specialty Summary

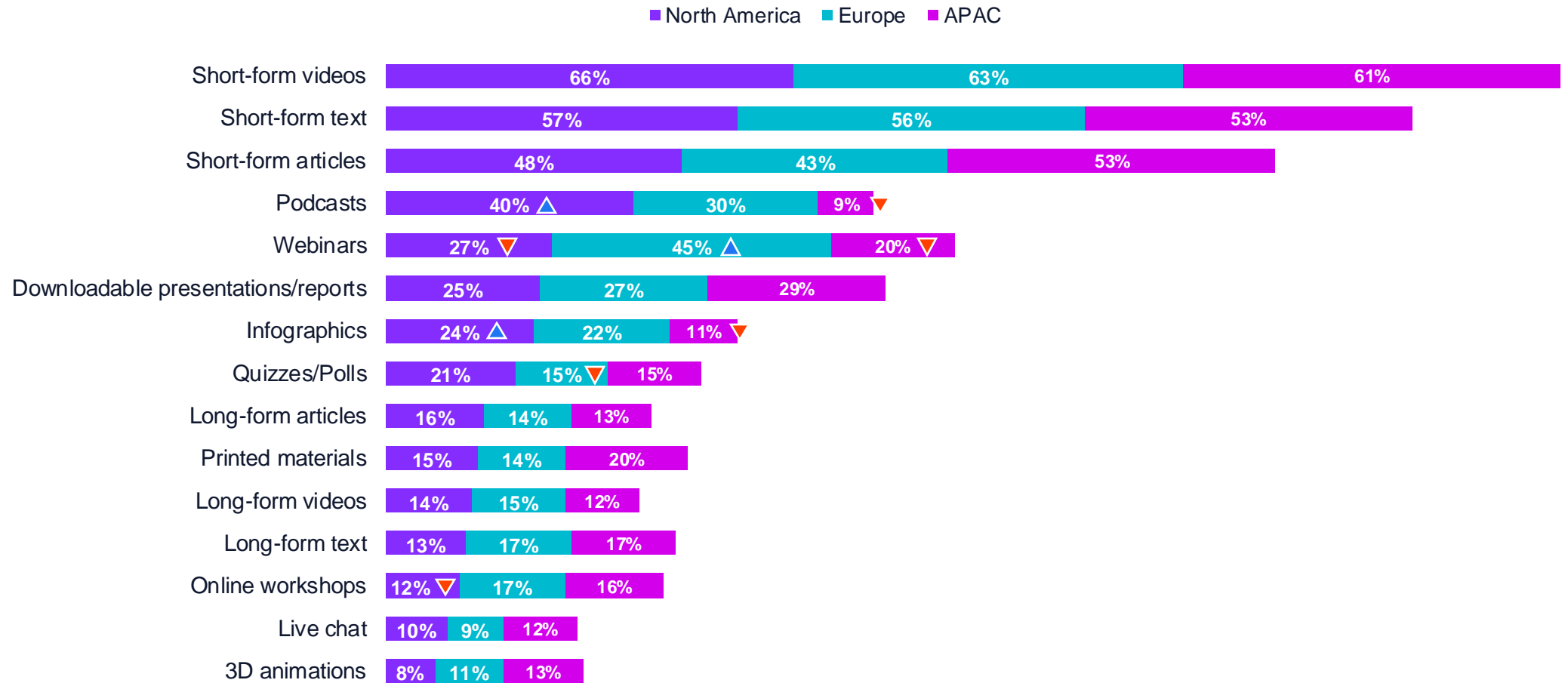
Q. Which format of social content created by healthcare influencers or KOLs do you find most valuable?

	Overall	Allergy & Immunology	Card	Derm	Endo	Gastro	General / Family Practice	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
Short-form videos	64%	53%	70%	64%	60%	55%	▲ 74%	61%	60%	66%	74%	59%
Short-form text	56%	67%	56%	50%	54%	63%	59%	54%	49%	57%	61%	53%
Short-form articles	46%	38%	43%	36%	50%	51%	46%	47%	49%	45%	50%	46%
Webinars	35%	29%	39%	▼ 23%	33%	35%	36%	34%	42%	34%	43%	37%
Podcasts	32%	27%	26%	28%	27%	31%	▲ 47%	32%	29%	31%	24%	41%
Downloadable presentations/ reports	27%	36%	27%	▼ 17%	29%	23%	▲ 35%	21%	27%	23%	36%	23%
Infographics	22%	20%	21%	22%	17%	25%	▲ 41%	▼ 13%	25%	17%	▼ 11%	19%
Quizzes/Polls	17%	13%	20%	16%	17%	18%	22%	13%	16%	13%	21%	18%
Long-form text	15%	20%	13%	10%	15%	13%	▲ 23%	12%	11%	15%	17%	18%
Printed materials	15%	20%	17%	9%	9%	14%	18%	9%	18%	21%	17%	15%
Long-form articles	15%	20%	15%	8%	14%	17%	17%	13%	12%	13%	14%	18%
Long-form videos	14%	13%	17%	10%	8%	13%	▲ 20%	12%	10%	16%	▲ 24%	14%
Online workshops	14%	13%	13%	9%	17%	15%	17%	10%	13%	18%	14%	15%
3D animations	10%	4%	11%	5%	6%	10%	14%	12%	7%	▲ 16%	14%	4%
Live chat	10%	4%	8%	5%	9%	13%	▲ 16%	7%	10%	9%	13%	9%

▲ Significantly higher than Global at 95% confidence level
▼ Significantly lower than Global at 95% confidence level

Region Summary

Q. Which format of social content created by healthcare influencers or KOLs do you find most valuable?



▲ Significantly higher than Global at 95% confidence level
▼ Significantly lower than Global at 95% confidence level

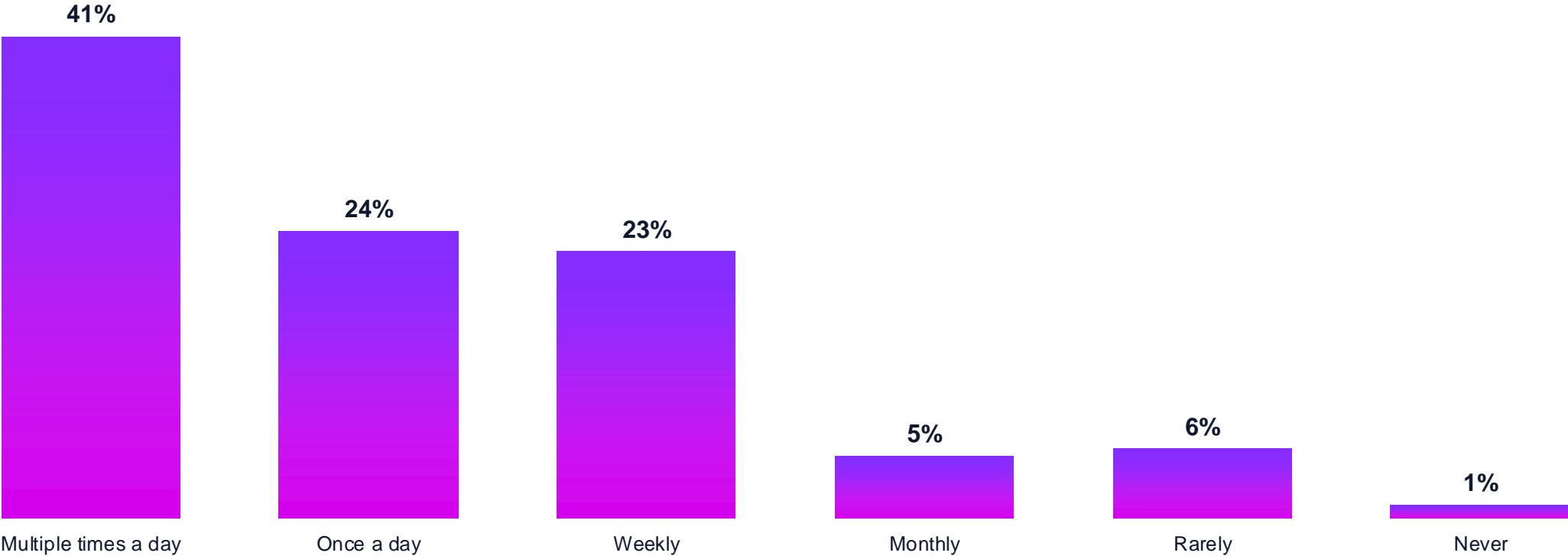
**So...what's
the influence
of these
influencers?**

sermo



Physicians are highly engaged with content created by healthcare influencers or KOLs on Social Media

Q: How often do you engage with content created by healthcare influencers or KOLs on Social Media?



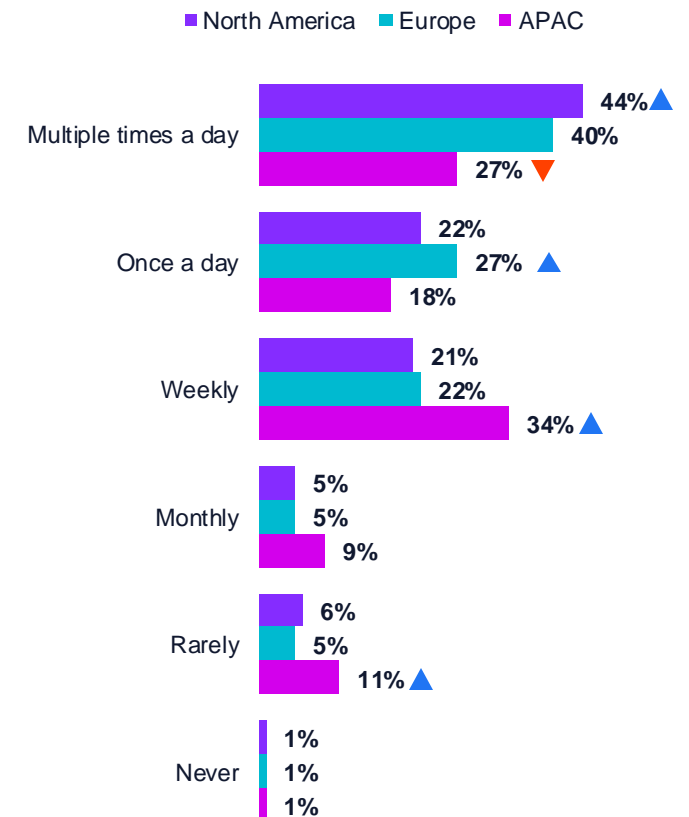
Specialty & Region Summary

Q. How often do you engage with content created by healthcare influencers or KOLs on Social Media?

SPECIALTY SUMMARY

	Overall	Allergy & Immunol.	Card	Derm	Endo	Gastro	GP / FP	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
Multiple times a day	41%	38%	41%	43%	▼ 30%	42%	▲ 56%	▼ 28%	36%	41%	44%	43%
Once a day	24%	36%	25%	26%	28%	23%	▼ 17%	28%	28%	25%	18%	19%
Weekly	23%	18%	26%	25%	23%	17%	19%	26%	21%	23%	26%	22%
Monthly	5%	4%	3%	2%	6%	8%	4%	9%	4%	5%	10%	4%
Rarely	6%	4%	5%	3%	10%	8%	4%	6%	9%	4%	1%	10%
Never	1%	--	--	1%	2%	1%	1%	3%	1%	1%	--	2%

REGION SUMMARY

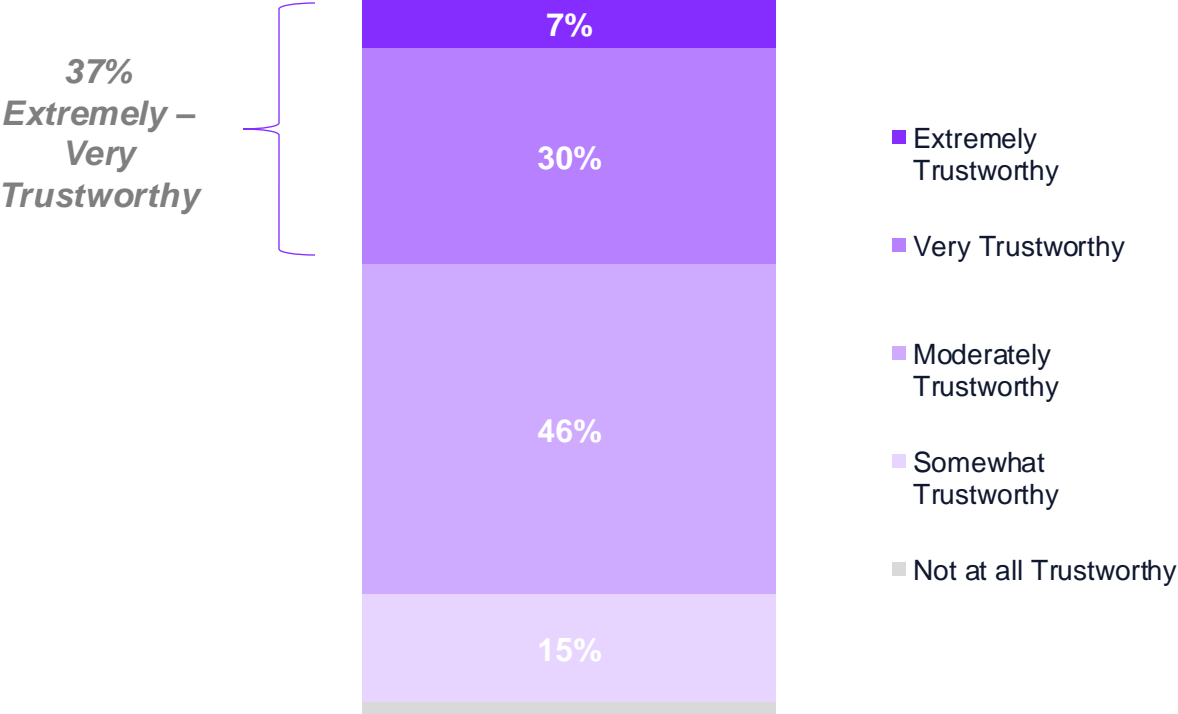


▲ Significantly higher than Global at 95% confidence level
 ▼ Significantly lower than Global at 95% confidence level

Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

37% of physicians consider the information provided by KOLs as extremely/very trustworthy

Q: In your opinion, how trustworthy is the information provided by healthcare influencers or KOLs on social media?



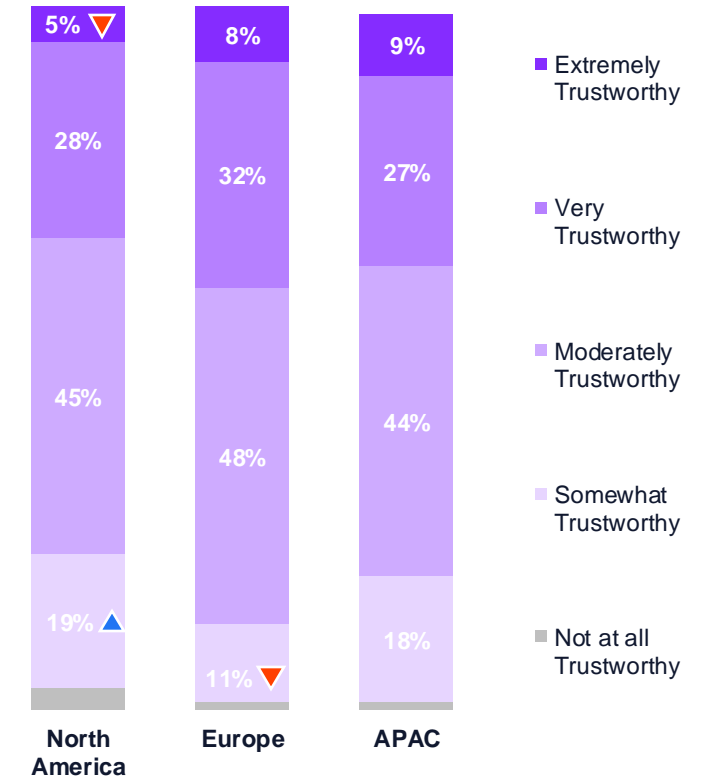
Specialty & Region Summary

Q. In your opinion, how trustworthy is the information provided by healthcare influencers or KOLs on social media?

SPECIALTY SUMMARY

	Overall	Allergy & Immunol.	Card	Derm	Endo	Gastro	GP / FP	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
Extremely Trustworthy	7%	7%	8%	5%	5%	8%	8%	3%	4%	11%	11%	5%
Very Trustworthy	30%	20%	36%	31%	24%	▼ 20%	35%	36%	24%	37%	36%	24%
Moderately Trustworthy	46%	51%	46%	40%	51%	49%	39%	44%	▲ 57%	40%	44%	53%
Somewhat Trustworthy	15%	22%	10%	17%	20%	21%	14%	14%	12%	8%	8%	16%
Not at all Trustworthy	2%	--	--	▲ 7%	--	1%	3%	2%	2%	3%	--	2%

REGION SUMMARY

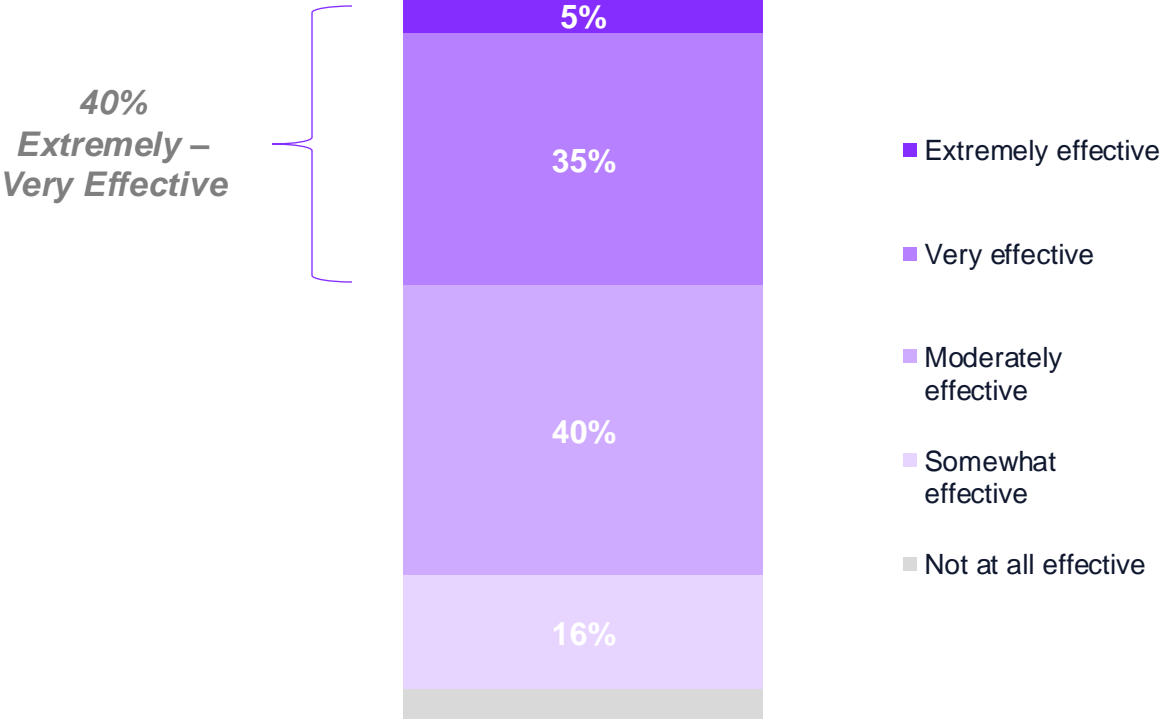


▲ Significantly higher than Global at 95% confidence level
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Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

40% of physicians believe KOL-led content is extremely to very effective in keeping them updated about treatments

Q: How effective do you find social media content from healthcare influencers or KOLs in keeping you updated about treatments?



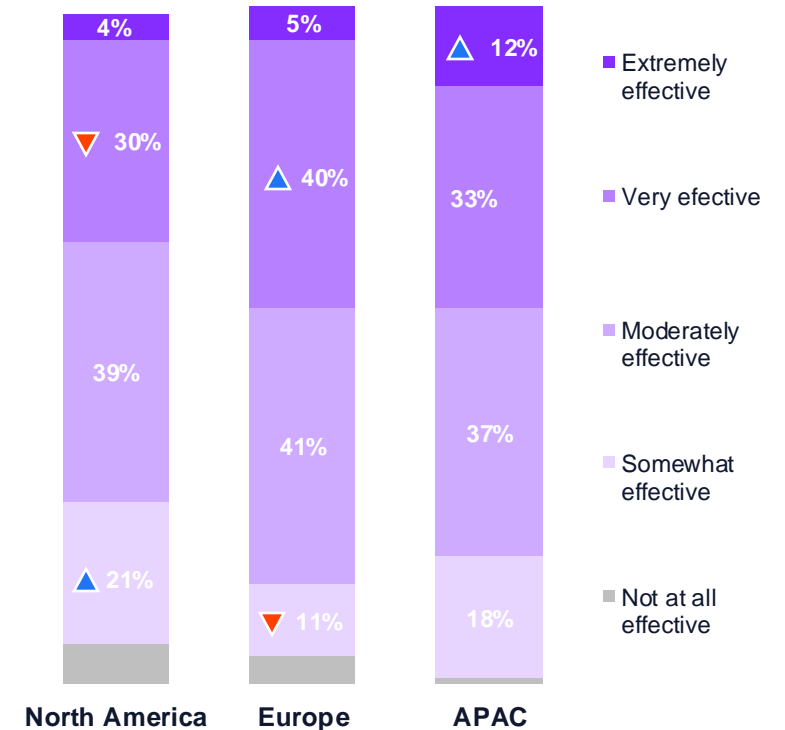
Specialty & Region Summary

Q. How effective do you find social media content from healthcare influencers or KOLs in keeping you updated about treatments?

SPECIALTY SUMMARY

	Overall	Allergy & Immunol.	Card	Derm	Endo	Gastro	GP / FP	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
Extremely effective	5%	4%	8%	3%	▼ 1%	8%	8%	1%	2%	▲ 11%	8%	2%
Very effective	35%	29%	36%	39%	31%	▼ 20%	41%	41%	34%	42%	35%	29%
Moderately effective	40%	47%	44%	36%	41%	▲ 51%	36%	▼ 29%	37%	31%	44%	48%
Somewhat effective	16%	16%	10%	18%	▲ 24%	18%	13%	21%	18%	10%	11%	15%
Not at all effective	4%	4%	1%	4%	3%	3%	3%	▲ 8%	▲ 9%	5%	1%	5%

REGION SUMMARY



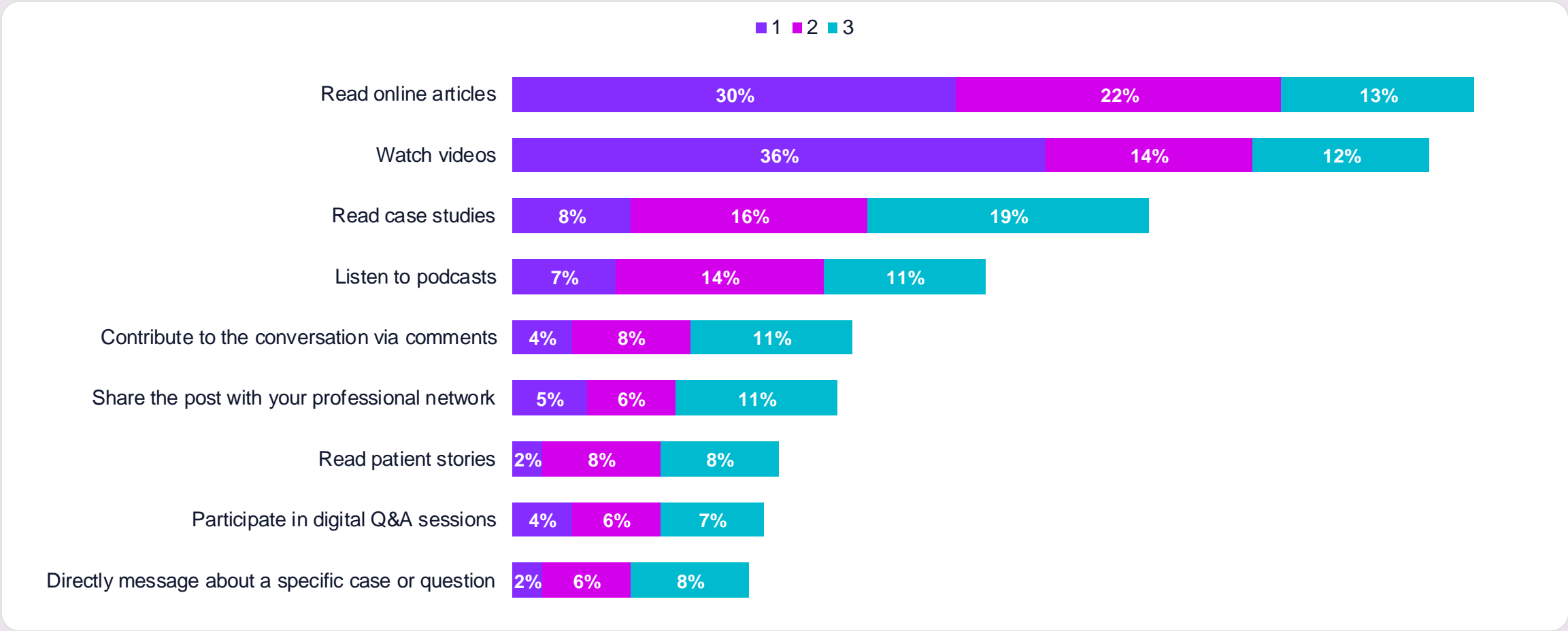
▲ Significantly higher than Global at 95% confidence level

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Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

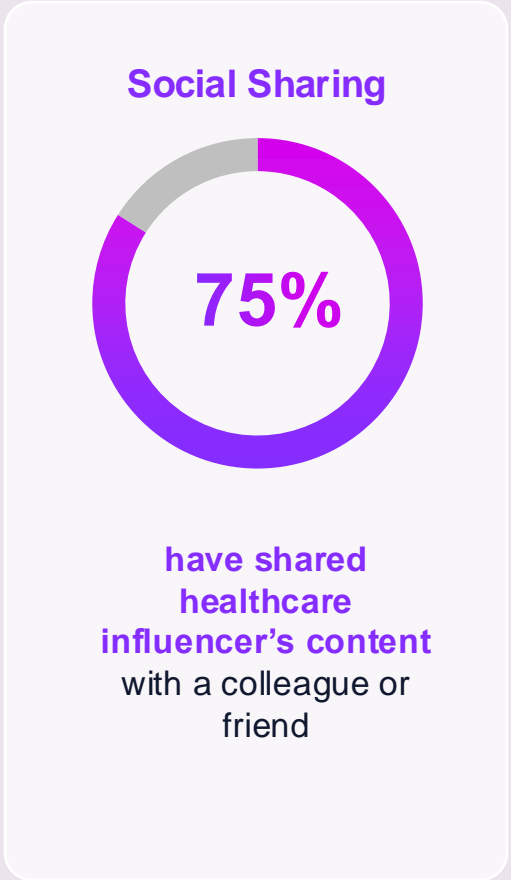
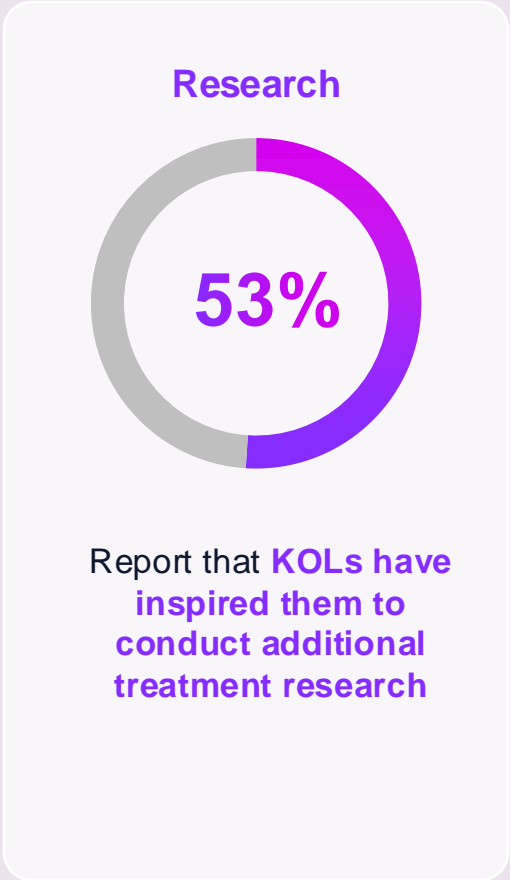
Reading online articles, watching videos & reading case studies are physicians' top ways of engaging with content created by healthcare KOLs

Q. Please rank the top 3 ways that you typically engage with content created by healthcare influencers or KOLs



Physicians are more open to learning and receiving information about treatments & pharma products when the recommendation comes from a KOL

Influencer Content Inspires:

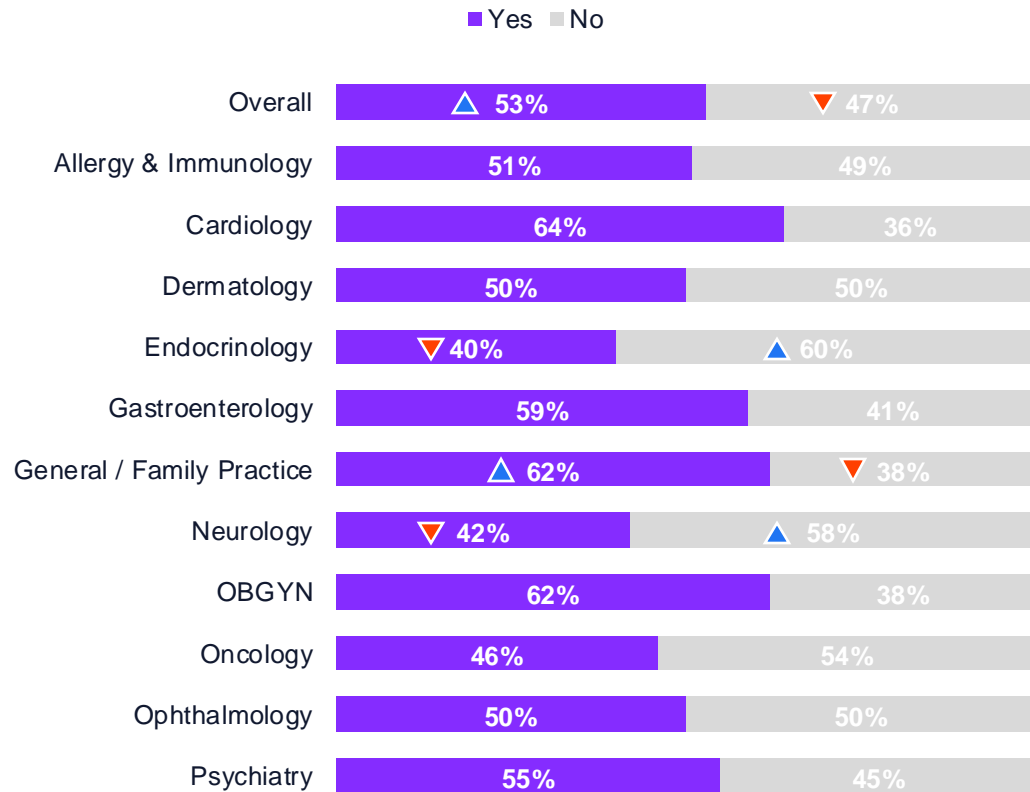


Specialty & Region Summary

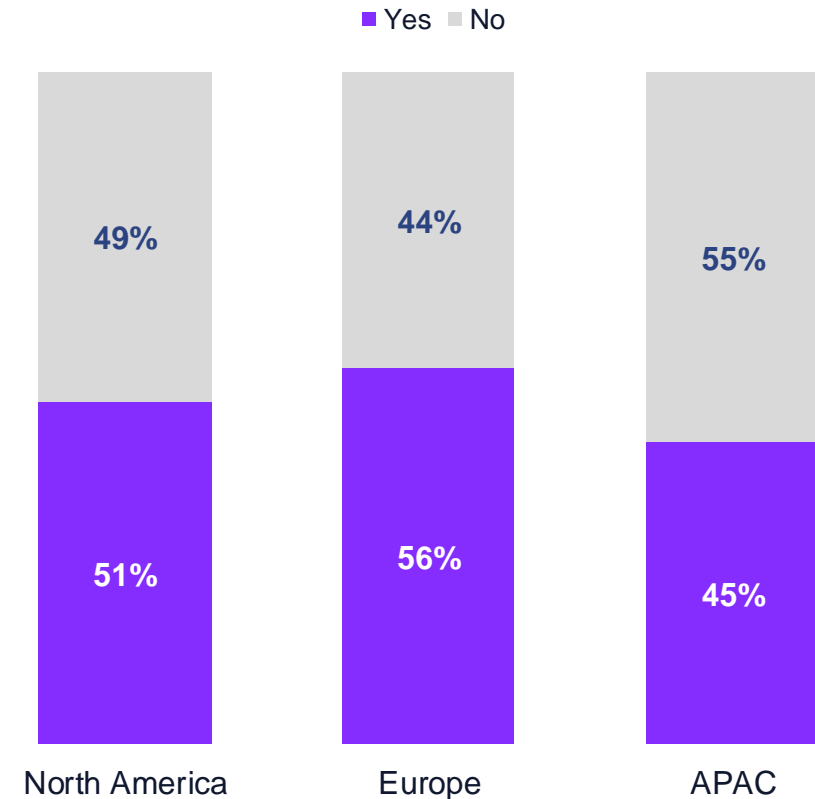
Q. Have you ever been inspired to conduct additional treatment research based on content from a healthcare influencer or KOL on social media?



SPECIALTY SUMMARY



REGION SUMMARY



▲ Significantly higher than Global at 95% confidence level
 ▼ Significantly lower than Global at 95% confidence level

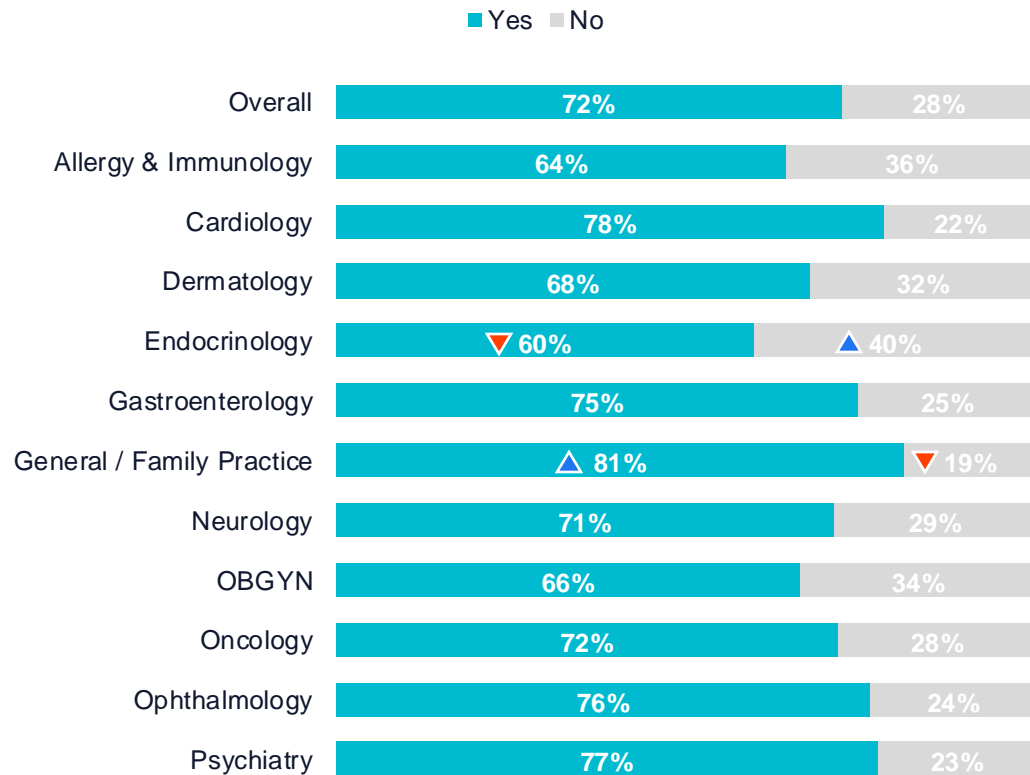
Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

Specialty & Region Summary

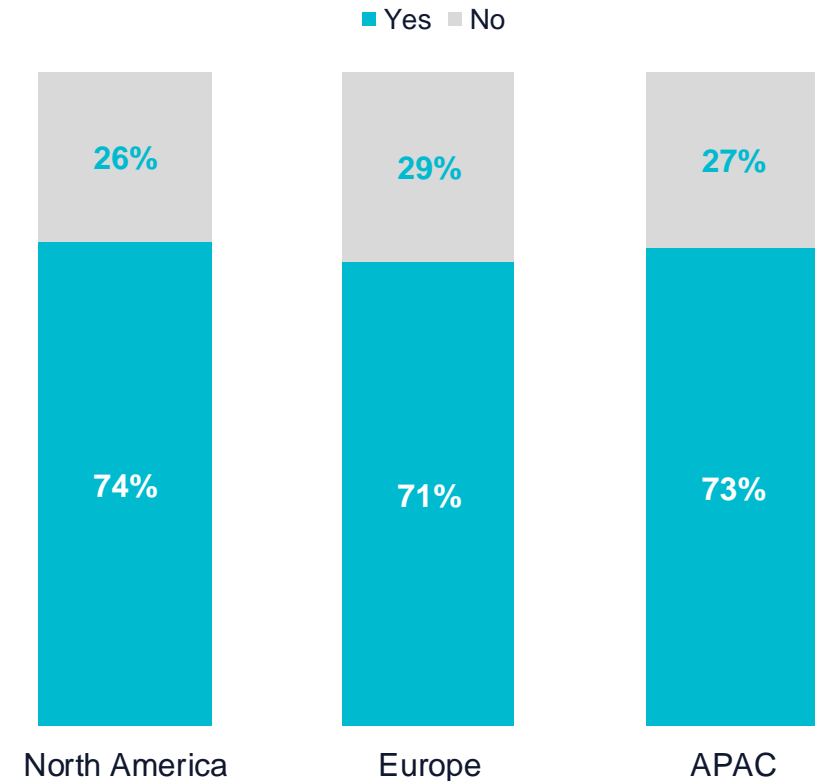
Q. Are you more likely to consider information about a pharmaceutical product if the information is presented by a trusted healthcare influencer or KOL?



SPECIALTY SUMMARY



REGION SUMMARY



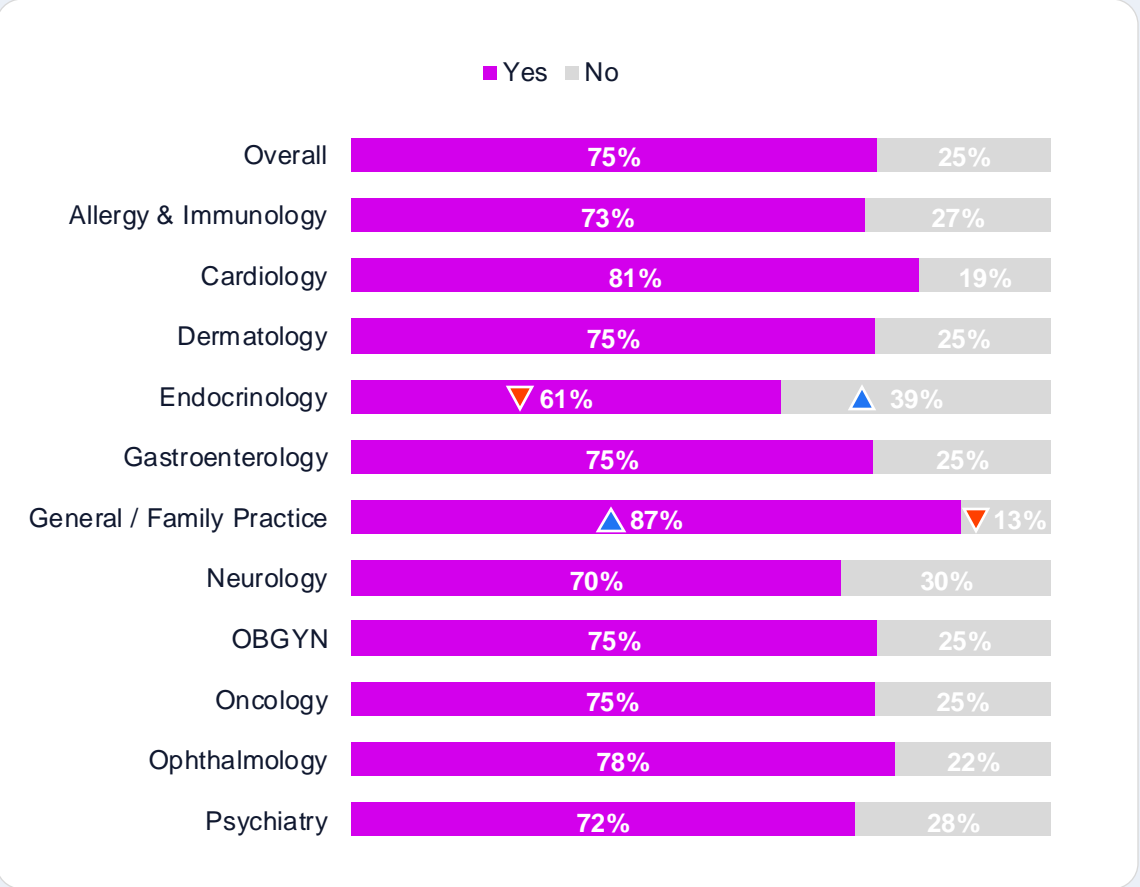
▲ Significantly higher than Global at 95% confidence level
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Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

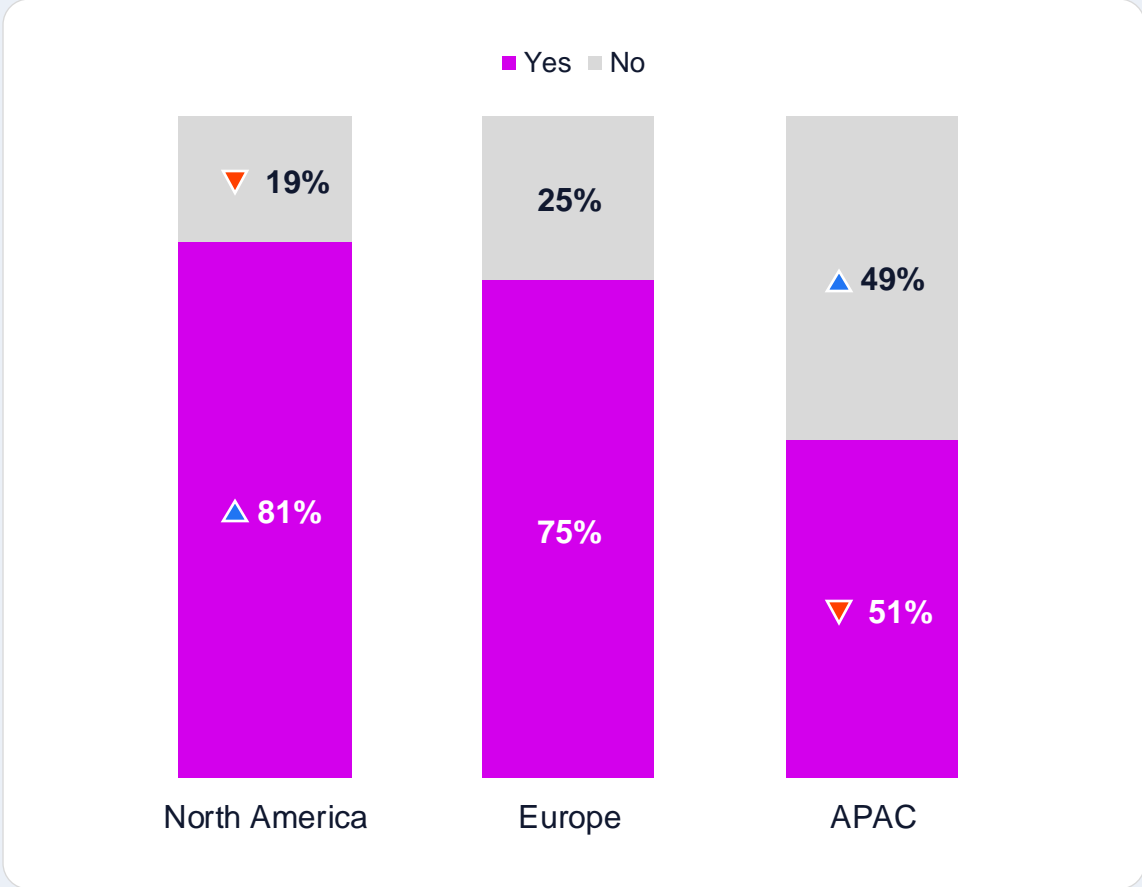
Specialty & Region Summary

Q. Have you shared a healthcare influencer's content with a colleague or friend in the past 6 months?

SPECIALTY SUMMARY



REGION SUMMARY

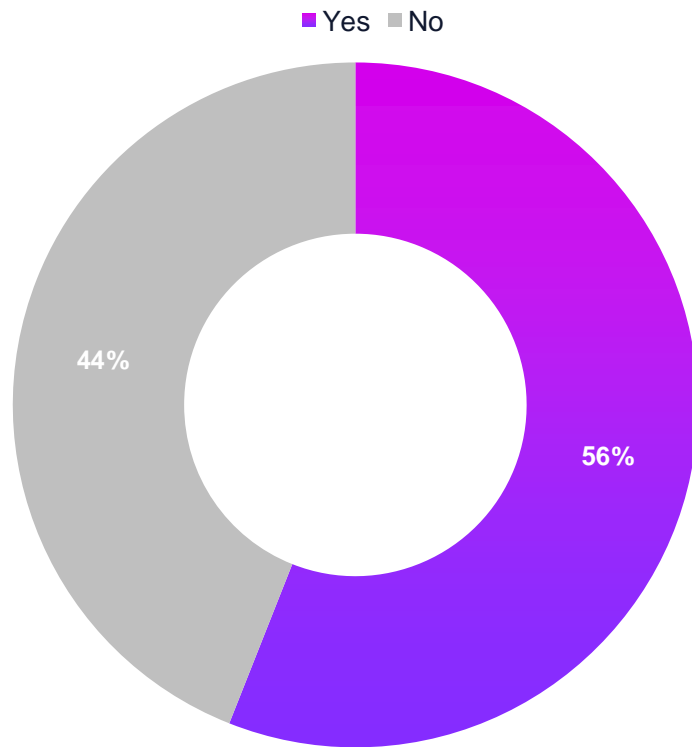


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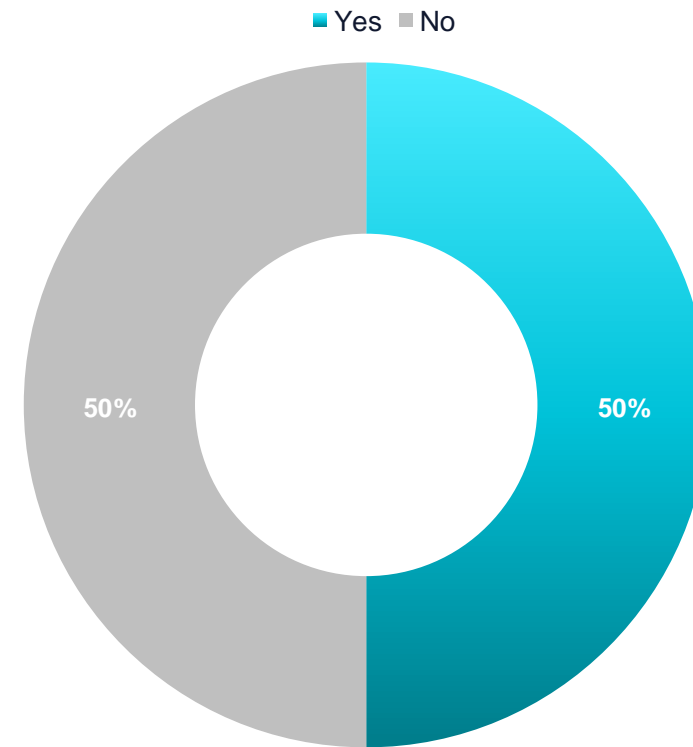
Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

KOLs play an important role in physician perceptions and prescribing choices

Q: Have you ever changed your **perception of a medication** based on content from a healthcare influencer or KOL on social media?



Q: Have you ever changed your **prescribing choices** based on content from a healthcare influencer or KOL on social media?



Specialty & Region Summary

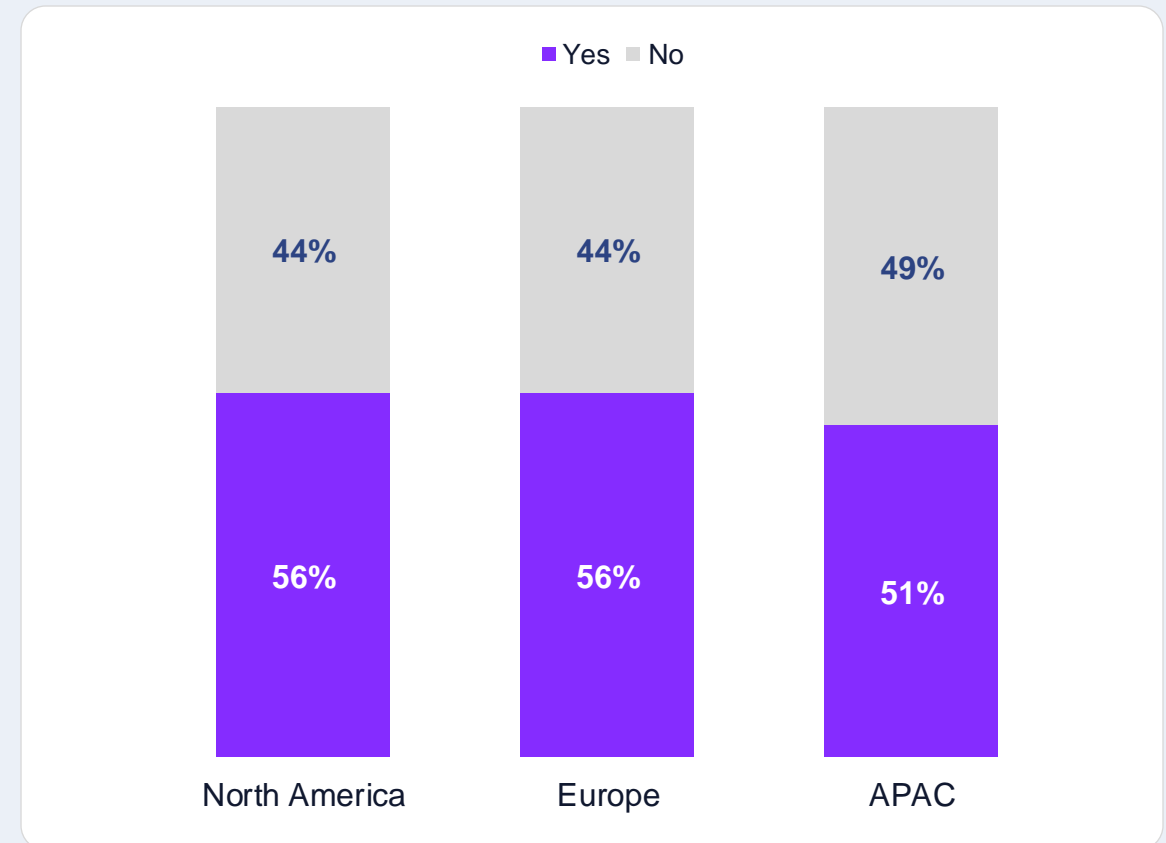
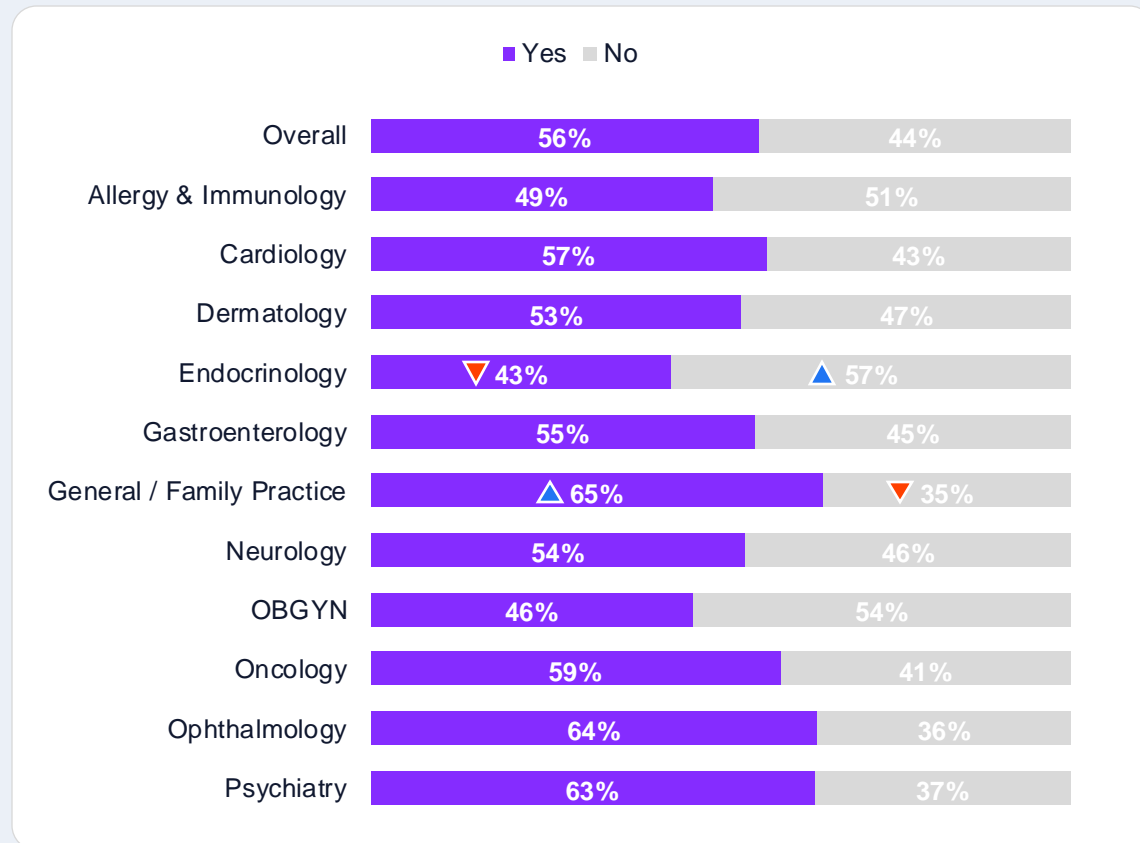
Q. Have you ever changed your *perception of a medication* based on content from a healthcare influencer or KOL on social media?



SPECIALTY SUMMARY



REGION SUMMARY



▲ Significantly higher than Global at 95% confidence level

▼ Significantly lower than Global at 95% confidence level

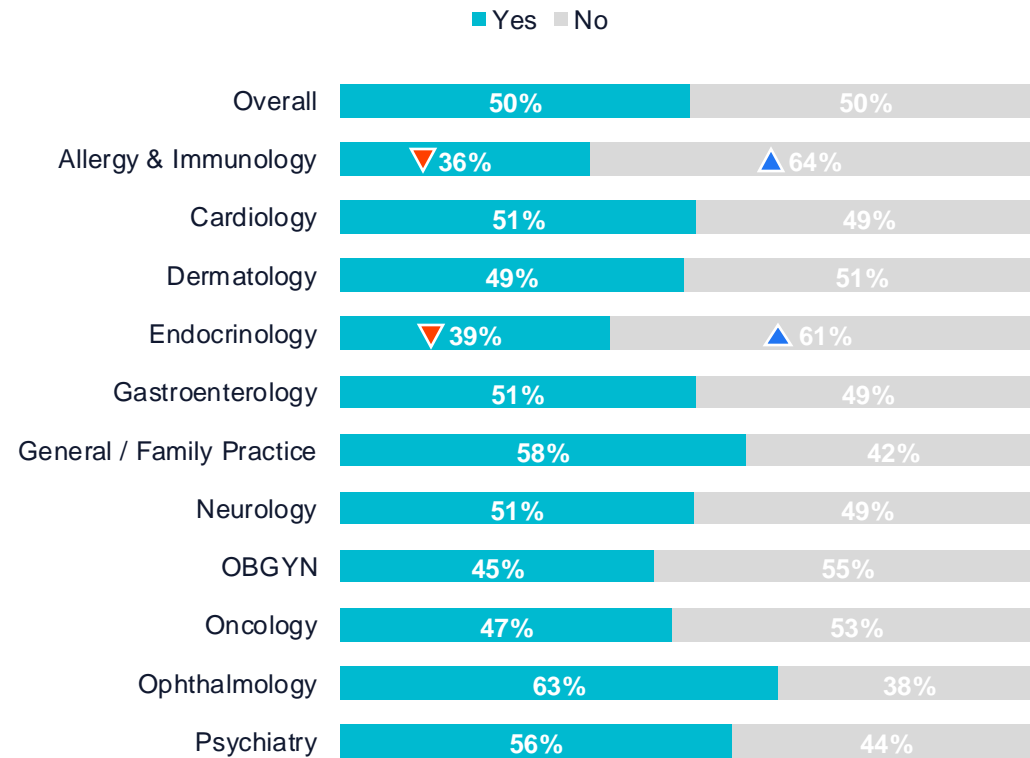
Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

Specialty & Region Summary

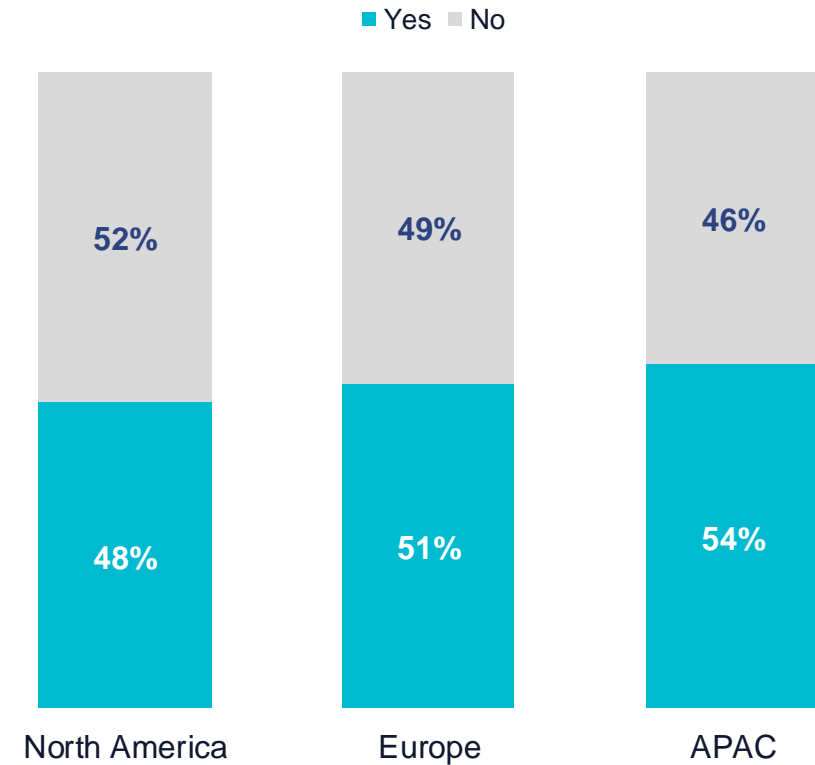
Q. Have you ever changed your **prescribing choices** based on content from a healthcare influencer or KOL on social media?



SPECIALTY SUMMARY



REGION SUMMARY

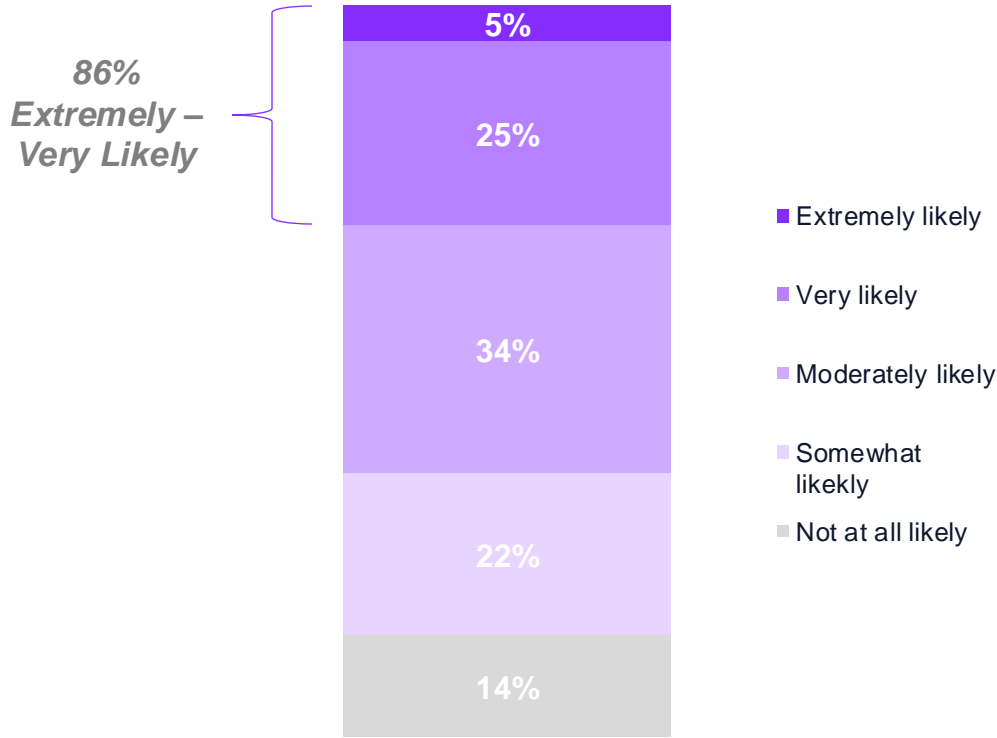


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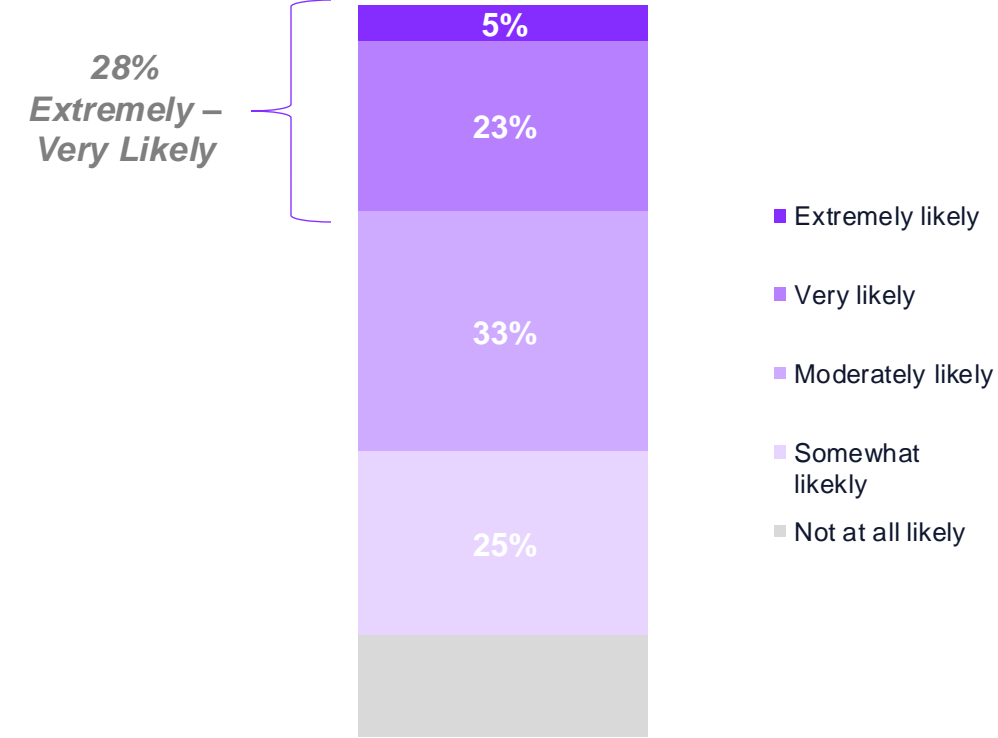
Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

Physicians are likely to engage with rising & established KOLs if they're affiliated with a pharmaceutical brand

Q: How likely are you to **follow or engage with a rising healthcare influencer or KOL** if they are affiliated with a pharmaceutical brand?



Q: How likely are you to **follow or engage with an established healthcare influencer** if they are affiliated with a pharmaceutical brand?



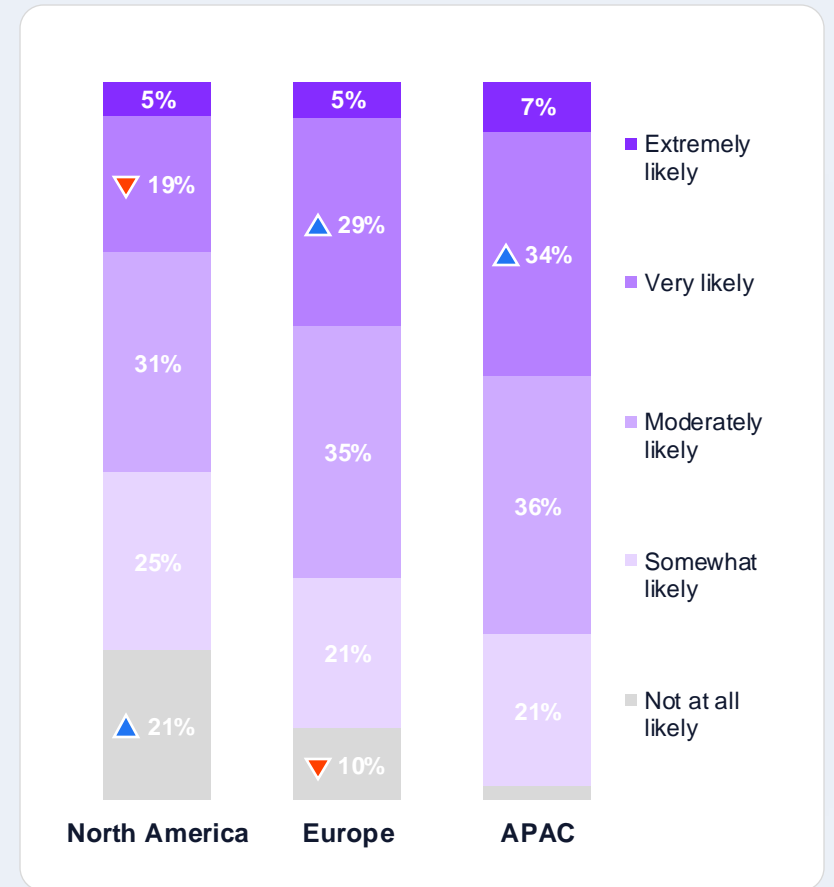
Specialty & Region Summary

Q. How likely are you to follow or engage with a rising healthcare influencer or KOL if they are affiliated with a pharmaceutical brand?

SPECIALTY SUMMARY

	Overall	Allergy & Immunol.	Card	Derm	Endo	Gastro	GP / FP	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
Extremely likely	5%	9%	6%	5%	2%	7%	5%	4%	7%	5%	6%	3%
Very likely	25%	13%	30%	22%	23%	▼14%	▲34%	27%	▼13%	▲37%	28%	20%
Moderately likely	34%	40%	37%	38%	36%	39%	30%	27%	28%	31%	40%	30%
Somewhat likely	22%	22%	16%	20%	27%	▲34%	17%	23%	28%	▼14%	22%	30%
Not at all likely	14%	16%	11%	16%	13%	▼6%	14%	20%	▲24%	12%	▼4%	16%

REGION SUMMARY



▲ Significantly higher than Global at 95% confidence level
▼ Significantly lower than Global at 95% confidence level

Source: RealTime Healthcare Influencers & KOLs Study, August 2024. N= 1,010 Physicians in Europe, APAC and North America

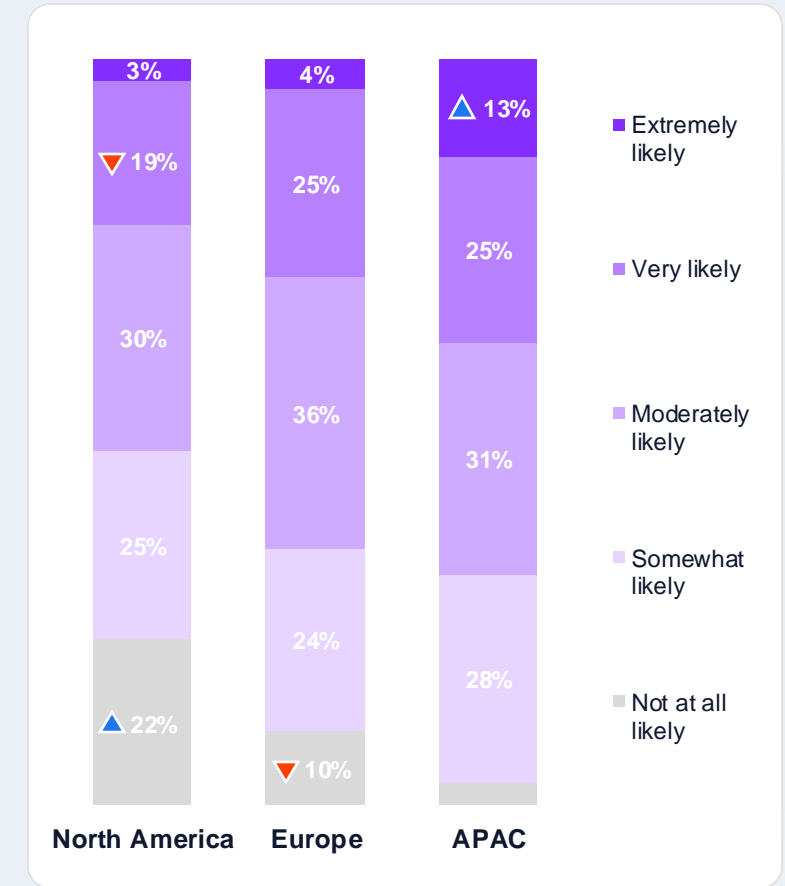
Specialty & Region Summary

Q. How likely are you to follow or engage with an established healthcare influencer or KOL if they are affiliated with a pharmaceutical brand?

SPECIALTY SUMMARY

	Overall	Allergy & Immunol.	Card	Derm	Endo	Gastro	GP / FP	Neuro	OB/GYN	Onc	Ophth	Psych
	n=1,010	n=45	n=106	n=96	n=109	n=71	n=133	n=97	n=89	n=99	n=72	n=93
Extremely likely	5%	7%	7%	6%	▼1%	4%	8%	3%	4%	5%	3%	3%
Very likely	23%	11%	26%	21%	16%	21%	28%	24%	16%	▲37%	25%	17%
Moderately likely	33%	42%	38%	36%	40%	34%	28%	29%	25%	25%	▲44%	32%
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Tips to supercharge and streamline your influencer strategy

sermo



Common challenges faced by pharma

Measurement/ROI
Ethical dilemmas **Complicated** Content approvals
Content moderation

Time-consuming

Expensive Influencer discovery / vetting **Contracting**
Content approvals

Transparency Regulatory issues

The Creator Lifecycle Playbook: Identifying & Profiling

IDENTIFYING

Identify the right HCPs based on your end audiences' needs

Build a network of diverse creators you can tap into year-round

- Planned activities
- "Wish list" activities

KEY INSIGHT

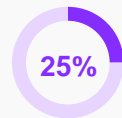
Physicians are **equally likely to follow rising stars as they are to follow an established KOL** affiliated with a pharma brand

Extremely/Very Likely to Follow

Rising Star



Established KOL



PROFILING

Go beyond just contact information to consider:



PROFESSIONAL / SCIENTIFIC HISTORY

- Hospital/Health System Affiliations
- Publications
- Clinical trials
- NIH grants
- Symposia
- Payments from pharma



DIGITAL FOOTPRINT

- Social Accounts
- # followers by channel
- Most used keywords/topics
- Amplification of their content – sharing, posting and how often other HCPs share their content/add their own perspective



AFFINITY

- Brand affinity
- Message affinity

The Creator Lifecycle Playbook: Activation

ACTIVATION

- Templatize, templatize, templatize!
- Set expectations upfront
- Prepping your KOLs is key
- Implement a robust pre-approval process with baked-in time for KOL review
- Maintain an ongoing relationship with creators/KOLs over time
- Be proactive about med-legal: one-click rule is not a thing, influencers require ISI
- Mitigate risk by providing a “do not mention” list
- Create an “issue management” process in case something goes wrong

Example KOL activation outreach

The rising prevalence of Condition X and the critical need for effective HCP education presents a significant challenge.

This rise prevalence not only strains healthcare systems but also significantly impacts patient quality of life, underscoring the urgent need for effective, KOL-driven educational initiatives.

You have been identified as a key online opinion leader in Condition X, whose expertise we are seeking to contribute to an upcoming disease state education program. These peer programs are designed to educate our physician audience and will be hosted on the Sermo platform.

I would love the opportunity to take a few minutes of your time for a brief call to share more detailed information about both the program and associated honoraria.

Look forward to hearing from you and potentially working together on this important educational opportunity.

Thanks in advance,

PS—Please note, there is limited availability for this opportunity.

← **Problem:** Name the problem

← **Amplify:** Point out why the problem is particularly bad

← **Solution:** Describe how to solve the problem

← **Transformation:** Demonstrate how you have helped solve similar problems

← **Offer:** Describe your specific offering

← **Response:** What should the creator do next



Never forgot to create a sense of urgency!

Thank you!

To learn how you can leverage Sermo's global community of 1.5M+ HCPs to support your healthcare insights and engagement strategy, email us at business@sermo.com

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