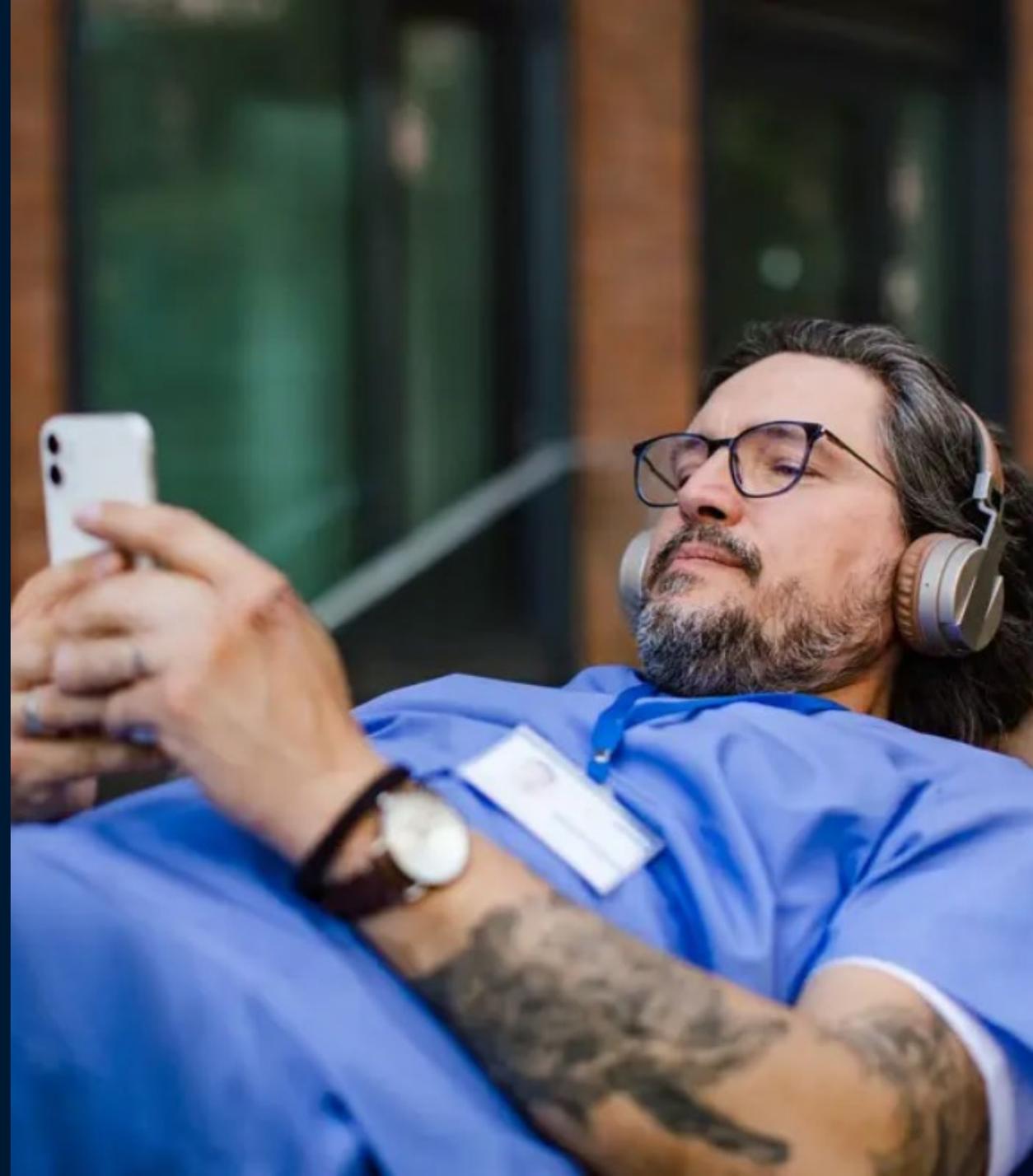


2025 Medical / Surgical Edition

## **M3MI** Doctors As Consumers

Connecting with Physicians  
Beyond the Workplace

**M3 MI**



TODAY'S WEBINAR

# Meet the M3 MI Team

**PRESENTER**

**Dan Lynch**

*Senior Manager,  
Insights & Analysis*



**MODERATOR**

**Courtney Scott**

*Marketing Manager*



**INSIGHTS SUPPORT**

**Sam Lubchansky**

*Director, Research &  
Operations*



# M3 MI

syndicated healthcare  
marketing research across  
patients, caregivers, and  
healthcare professionals



## M3MI Doctors As Consumers

The industry's **only** syndicated research that capturing physicians' media usage and attitudes **outside of the workplace**

**3,804** survey respondents across **25+ specialties**

- Family Medicine
- Internal Medicine
- Allergy
- Anesthesiology
- Cardiology
- Dermatology
- Diabetes/Endocrinology
- Emergency Medicine
- Gastroenterology
- Infectious Disease
- Nephrology
- Neurology
- Obstetrics/Gynecology
- Oncology
- Hematology/Oncology
- Otolaryngology
- Pediatrics
- Psychiatry
- Pulmonary
- Rheumatology
- Surgery: General
- Surgery: Orthopedic
- Surgery: Plastic
- Urology

PA/NP edition is also available



Gain a more **complete marketing picture of physicians**



**Bridge the gap** between siloed DTC & HCP strategies



Understand media's halo effect to **gain efficiencies**



Physicians are people too

# Physicians face high stress; work-life balance is key to satisfaction



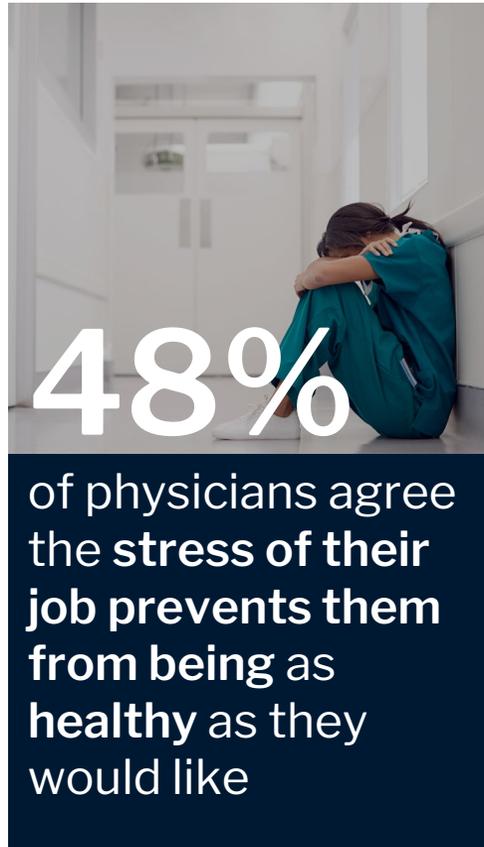
17

Patients a physician see in an average day



19 min.

Average length of a follow-up patient visit



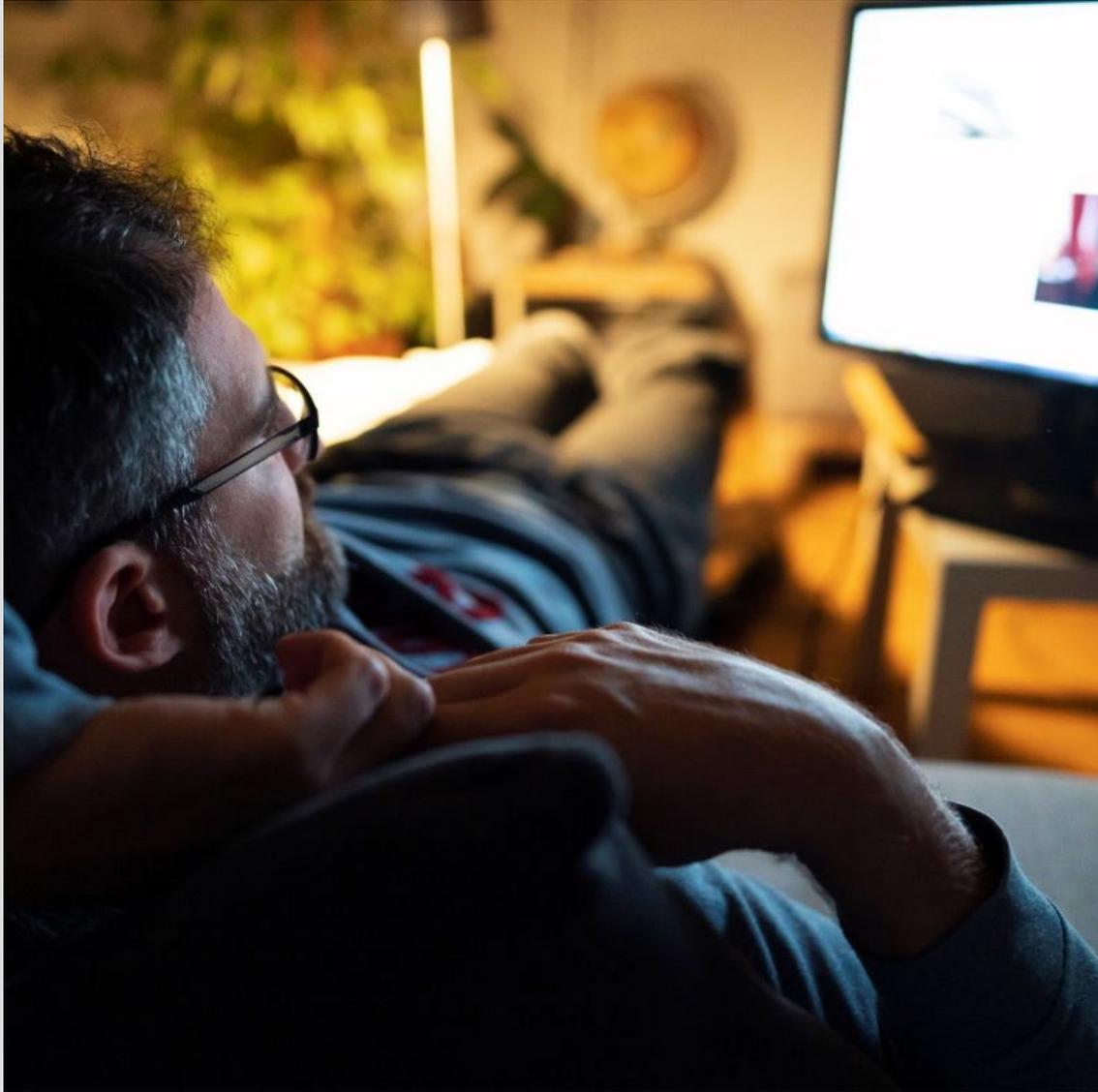
48%

of physicians agree the stress of their job prevents them from being as healthy as they would like

Among them...

## NEW: Top 5 Factors Impacting Career Satisfaction (Very important/important)





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# Television Viewership

M3 MI

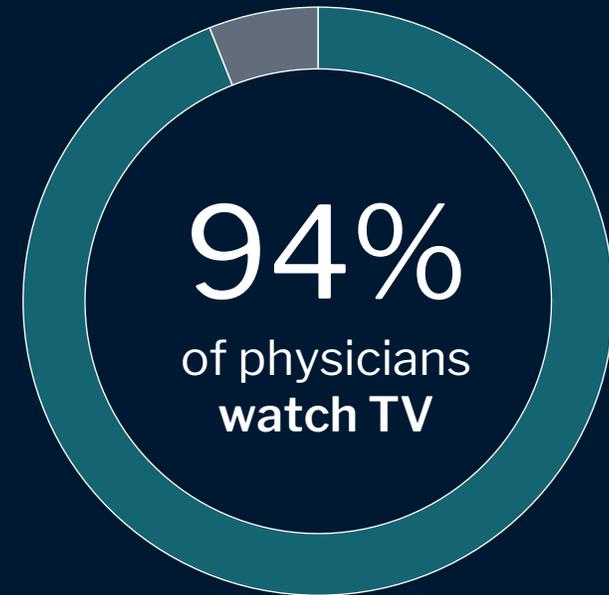
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In 2024,  
Pharmaceutical  
companies spent over  
**\$7.5 billion dollars**  
on DTC TV ads

Sources: 2025 Doctors As Consumers Study  
MediaRadar

*Did you know...*

DTC TV advertising delivers a halo effect  
by extending its reach to physicians



# Concentrated TV viewing on their time

**Average # of Hours Per Day Spent Watching TV**  
(Any device)



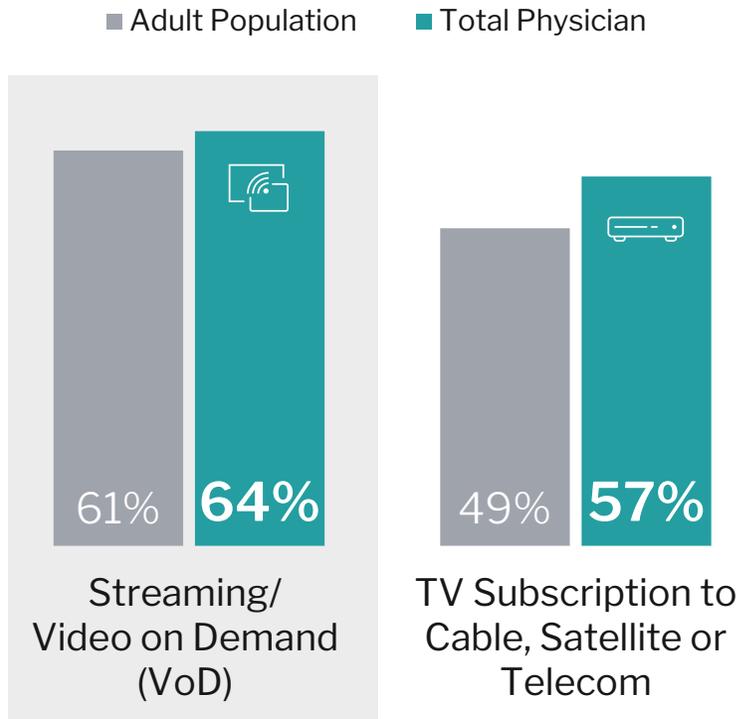
**% Any TV Viewing by Daypart**  
(Weekday or Weekend)

	Adult Population	Total Physicians
6 AM - 9 AM	63%	27%
9 AM - 6 PM	81%	35%
<b>6 PM - 11 PM</b>	89%	<b>89%</b>
11 PM - 6 AM	61%	25%

Physician households are **23% more likely to view TV on-demand**

# Prefer streaming/VoD to view subscription services

Types of TV Watched in Household  
(Among TV Viewers)



Among physician streamers, they watch...

Top 5 Streaming Services  
(In the last month)

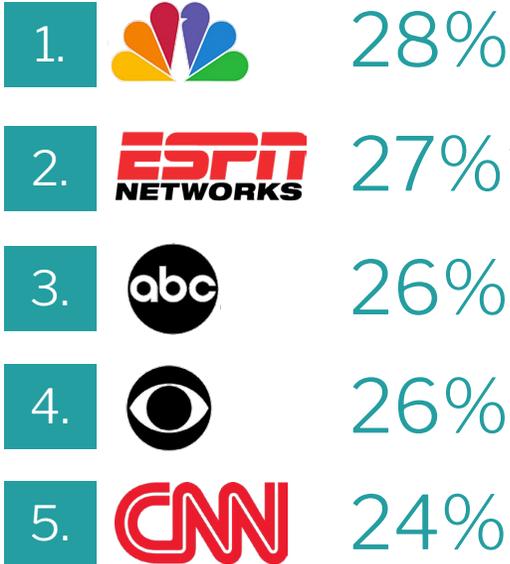


Depending on the service, **25% to 50% pay more for the ad-free tier**

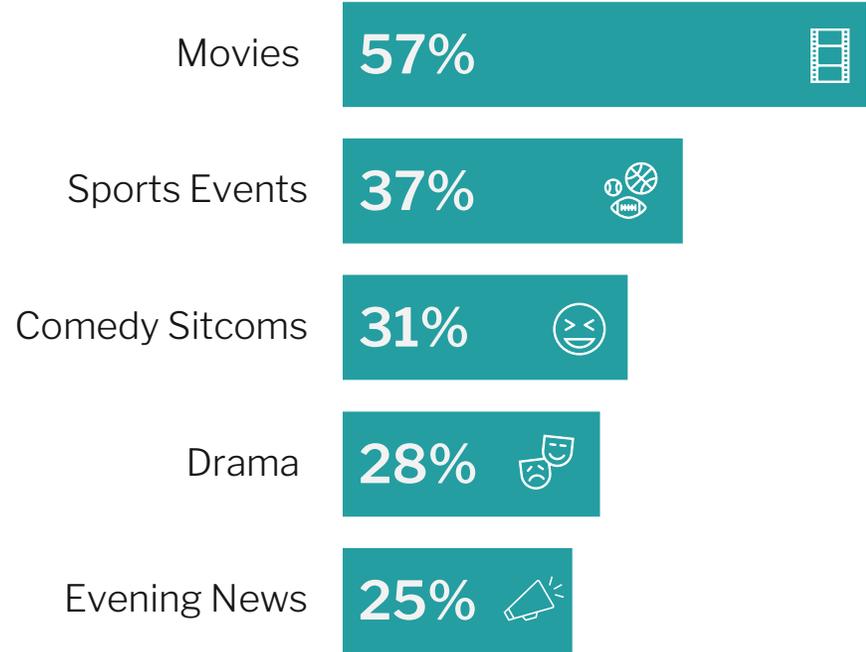
Overall, physicians paying for ad-free **decreased by 5% from 2024**

# Physicians watch broadcast networks and shows that offer an escape

## Top 5 Networks (In Last 7 Days)



## Top 5 Genres of TV Shows Watched (In Last 7 Days)



### Top sports physician ESPN viewers watch:





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# Radio, Streaming Music, & Podcast Listening

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# Poll Question #1

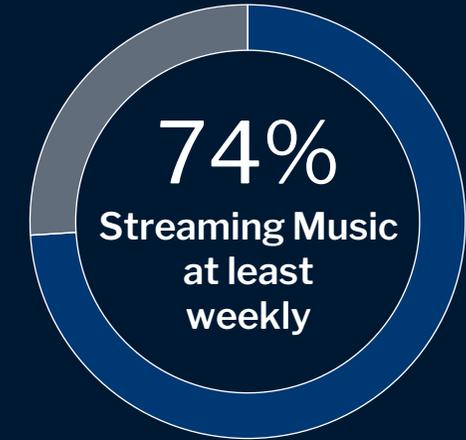
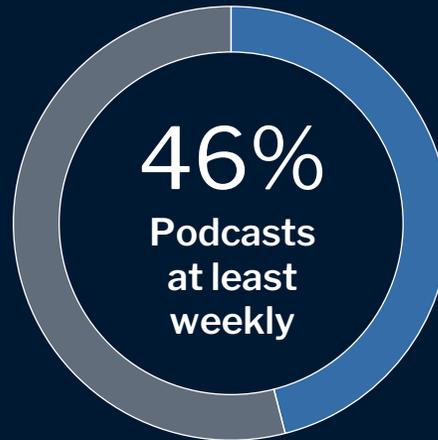
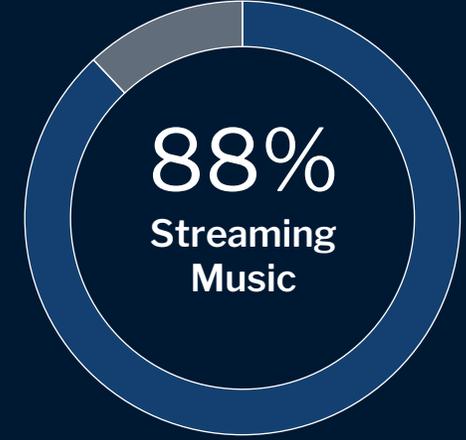
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What percentage of physicians do you think listen to podcasts?

*Please take a moment to select and submit your response on screen.*

Source: 2025 Doctors As Consumers Study

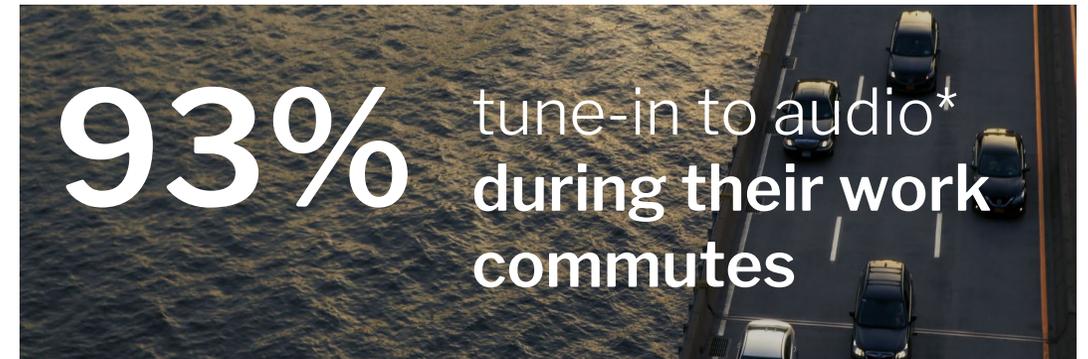
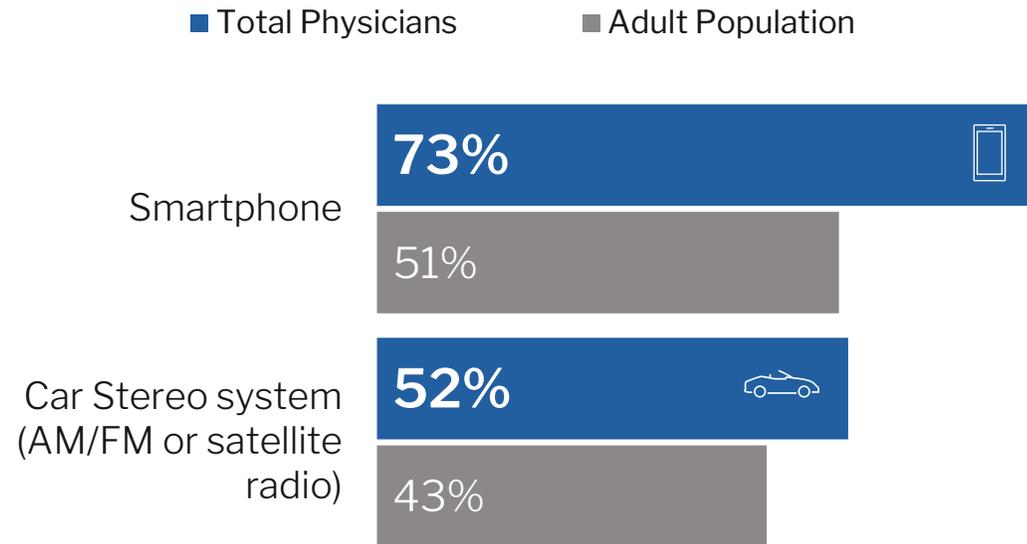
# Physicians listen to:



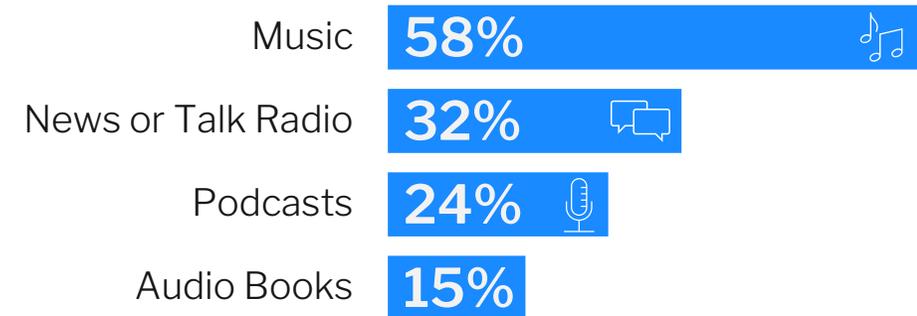
Source: 2025 Doctors As Consumers Study

# Physicians prefer to listen to audio on the go

## Top Devices Used For Radio/Podcasts/Music



## Top Types of Audio\* Listened To During Work Commute (Among Physicians Who Listen to Radio/Podcasts/Music)



# Physicians listen to Podcasts for infotainment

## Top 3 Platforms Used to Listen to Podcasts

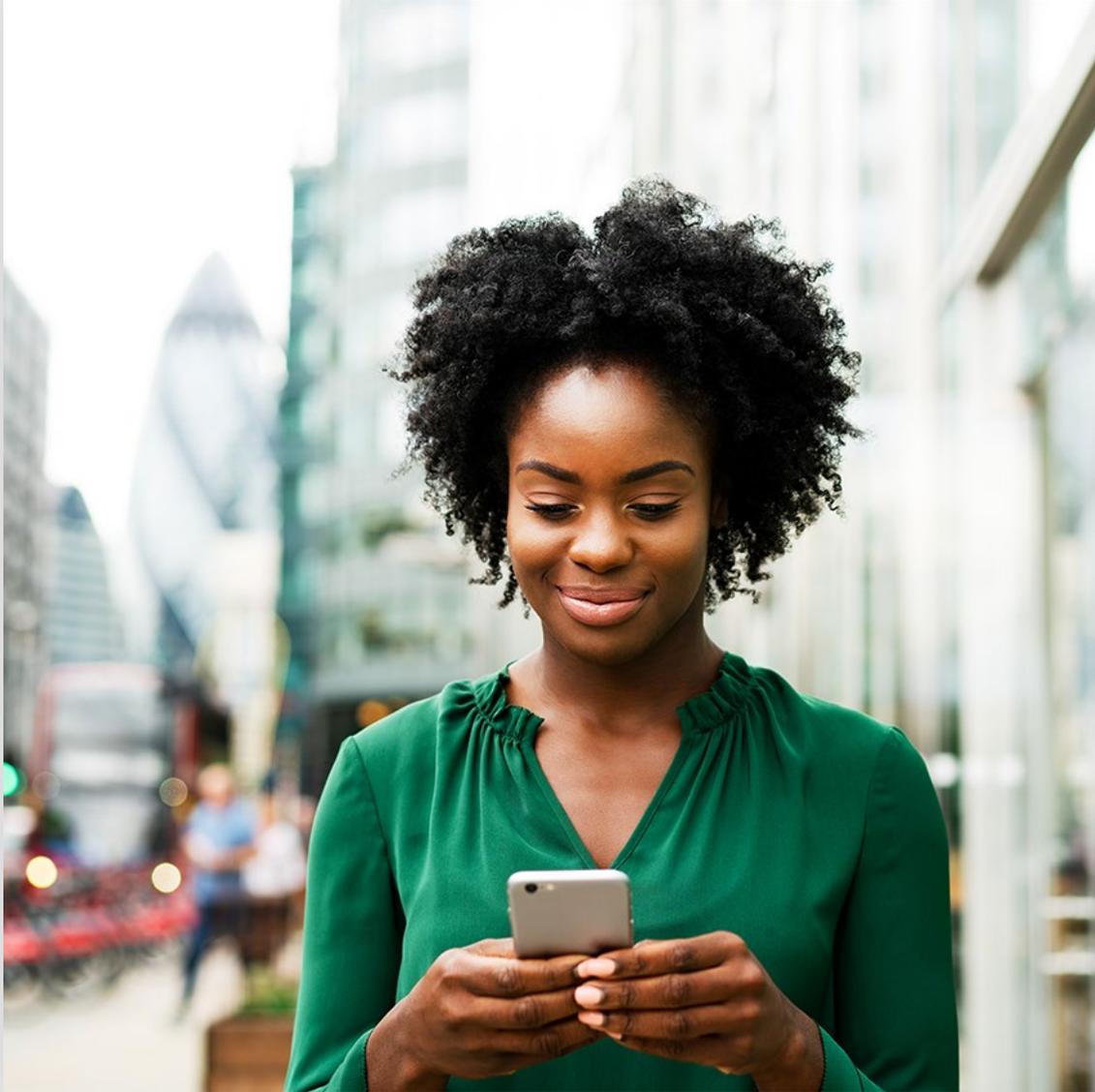


## Top 5 Types of Podcasts Regularly Listen to For Personal Reasons



## Top 3 Platforms Used to Stream Music (Among physicians streaming music)





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# Online Usage & Behavior

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In a typical day  
physicians  
spend **nearly**  
**3 hrs. online**

### Internet Usage In A Typical Day

#### Total Physicians

6 AM - 9 AM 30 min.

9 AM - 6 PM 53 min.

6 PM - 11 PM **1 hr. 9 min.**

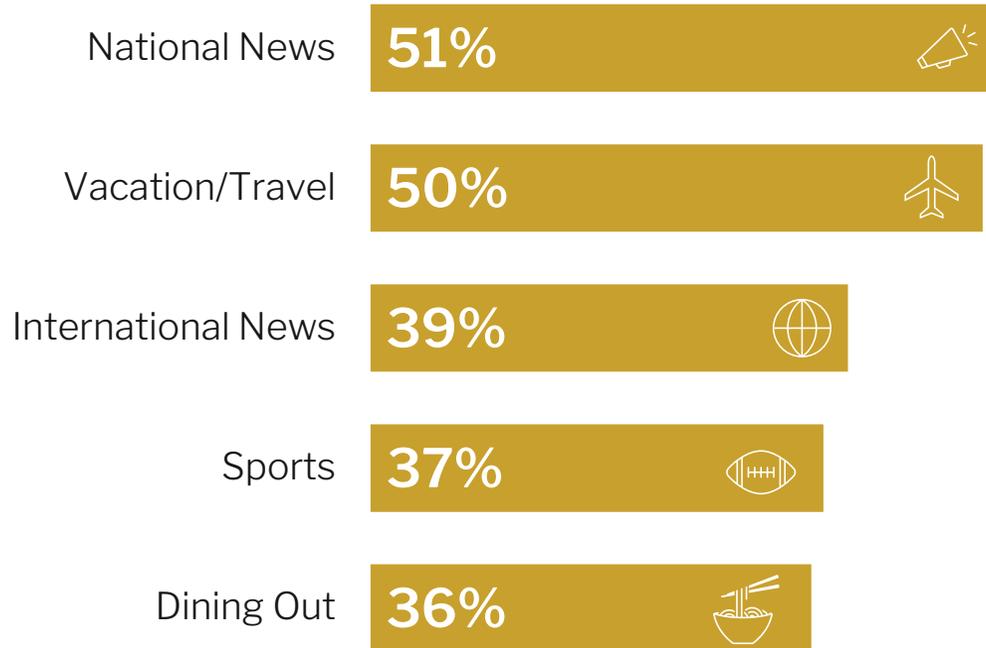
11 PM - 6 AM 17 min.

More than half  
(53%) of  
physicians agree  
they **often read**  
**general medical**  
**content in their**  
**leisure time**

Source: 2025 Doctors As Consumers Study

# Physicians browse news, sports, and medical content online

## Top 5 Topics Regularly Research, Follow, or Read About Online



30% of physicians regularly consume **healthy lifestyle** content online

### Medical Websites Used for Personal Reasons (At Least Monthly)

1. **WebMD** 33%
2. **GoodRx** 25%
3. **MAYO CLINIC** 21%
4. **Drugs.com Professional Edition.** 17%

# Physicians' time on Social Media equals 2 full weeks a year



## Top 5 Social Networks Used for Personal Reasons (At Least Monthly)

- |    |   |     |
|----|---|-----|
| 1. |  YouTube   | 77% |
| 2. |  facebook  | 60% |
| 3. |  Instagram | 48% |
| 4. |  Linked in | 37% |
| 5. |  reddit  | 33% |

## Key Takeaways

- **Physicians have limited free time and typically engage with media on-demand outside of work**
- **DTC media buys can build awareness of treatments and medical devices among physicians**
- **Preferred media outside of work includes:**
  - Broadcast networks and subscription-based streaming platforms
  - Infotainment podcasts
  - Online content focused on news, travel, and sports
  - Social media on Meta and YouTube
- **Physicians are consumers too, but they are unique; you should avoid assumptions about their media habits and use data-driven insights**

# Thank you!

For more information on this study or other M3 MI offerings, contact us...

**Email**

[info@m3-mi.com](mailto:info@m3-mi.com)

**Website**

[M3-MI.com](http://M3-MI.com)

**LinkedIn**

[linkedin.com/company/m3-mi](https://linkedin.com/company/m3-mi)

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