

Physician Social Experience

Empower your marketing strategies by understanding physicians' social experience across professional and consumer platforms

M3 MI

Kantar Media
Healthcare Research



Methodology Overview

Three M3 MI Professional Health studies were utilized in this report:

2023 Sources & Interactions Study Medical/Surgical U.S. edition (n=2,796 U.S. physician respondents, across 23 specialties)

- Preferences, motivations and interactions across the wide spectrum of channels HCPs are exposed

2023 HCP Digital Insights Study (n=2,825 U.S. physician respondents, across 23 specialties)

- Comprehensive assessment of physicians' digital and communication behaviors

2024 Medical/Surgical Media Measurement Study (n=4,094 U.S. physician respondents, across 24 specialties)

- Preferences and usage across specific website, social networks, apps, publications, etc.

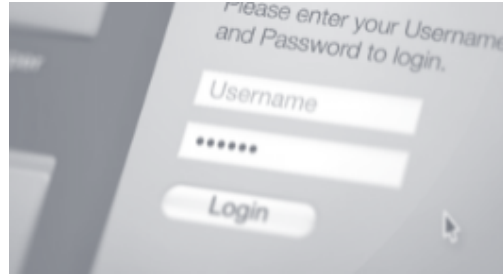
Data collection and weighting:

- All three studies were conducted online, active physicians are invited via email or through panel partners.
- Sample sources include:
 - **2023 Sources & Interactions Study Medical/Surgical U.S. edition** (fielded Feb.-May 2023): M3 All Global physician and Sermo WorldOne physician panels
 - **2023 HCP Digital Insights Study** (fielded Jun.-Aug. 2023): M3 All Global physician and M3 Global Research physician panels
 - **2024 Medical/Surgical Media Measurement Study** (fielded Nov. 2023 – Mar. 2024): All Global/M3 physician, Sermo and Survey Healthcare Global physician panels
 - All three featured random selection from AMA Physician Masterfile (for the 2024 Media Measurement study the AOA Physician Masterfile was also used) containing both members and non-members (emails provided by IQVIA, M3 MI internal database and American Society of Plastic Surgeons)
- Weighting for the three surveys was done to universe of each specialty by age group

While the importance of physician information resources varies by channel, social is a top non-personal source



96% CME, Colleagues, Conferences, Meetings



93% Portals, websites
Disease-specific/society/consumer news



81% Journals
Print and digital/websites



69% Newsletters, government bulletins
Print and email



63% Sales reps, Pharma websites, promotional videos



59% Mobile apps
Drug reference or diagnostic tools



42% Non-CME webinars/
podcasts,
instructional videos



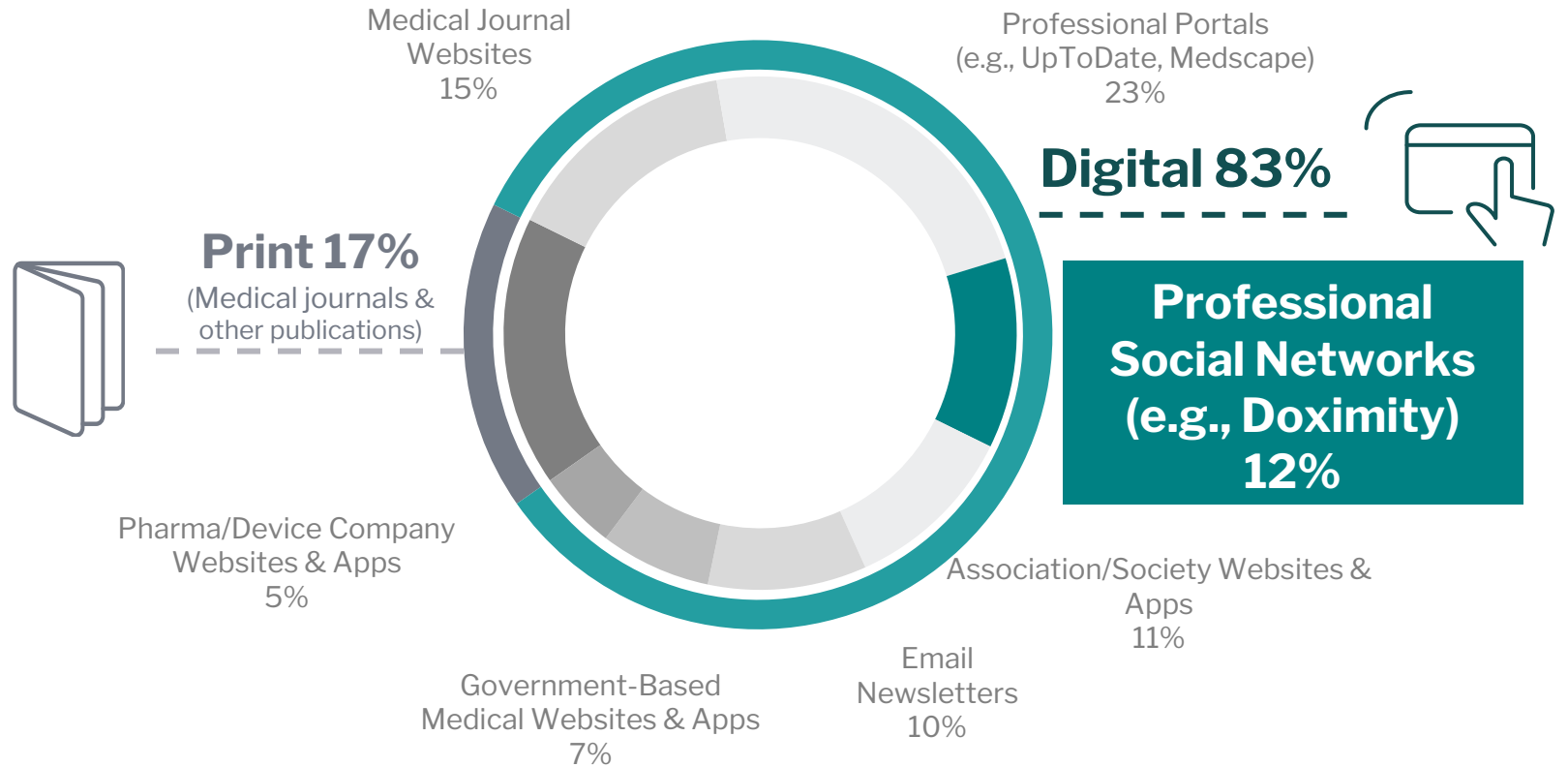
34% Social media
Professional or consumer

Social is 3rd highest digital channel for time spent reading medical content

89% of physicians use social media

On average, **physicians spend 31% of their internet time on social media** (for professional or personal purposes)

Time Spent in a Typical Week Reading Medical Content
(Average % by channel)



When it comes to medical information on social, many physicians are skeptical about the content being shared/posted

31% of physicians

Trust the medical info shared in a professional context on social media



85% of physicians

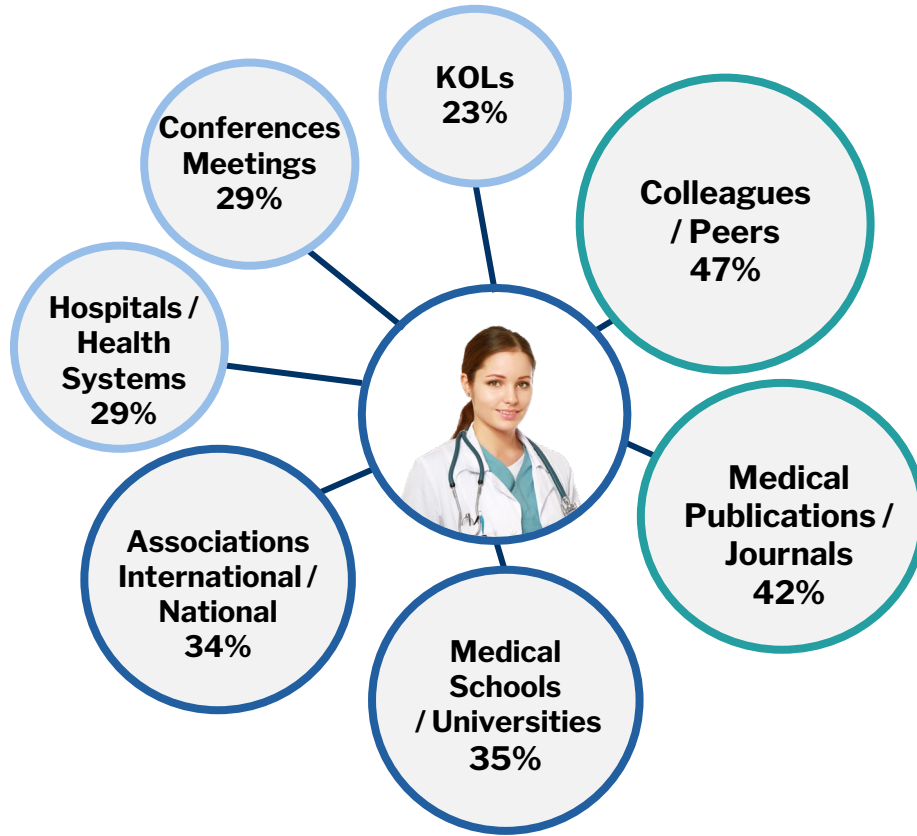
Worry about the reliability of medical information shared by patients on social media



1 in 3 believe **social media** has overall been a **net-positive for the medical community.**

Their professional social connections are sources of trust, and some can impact a physician's prescribing decisions

Types of Professional Connections Within Social Networks *



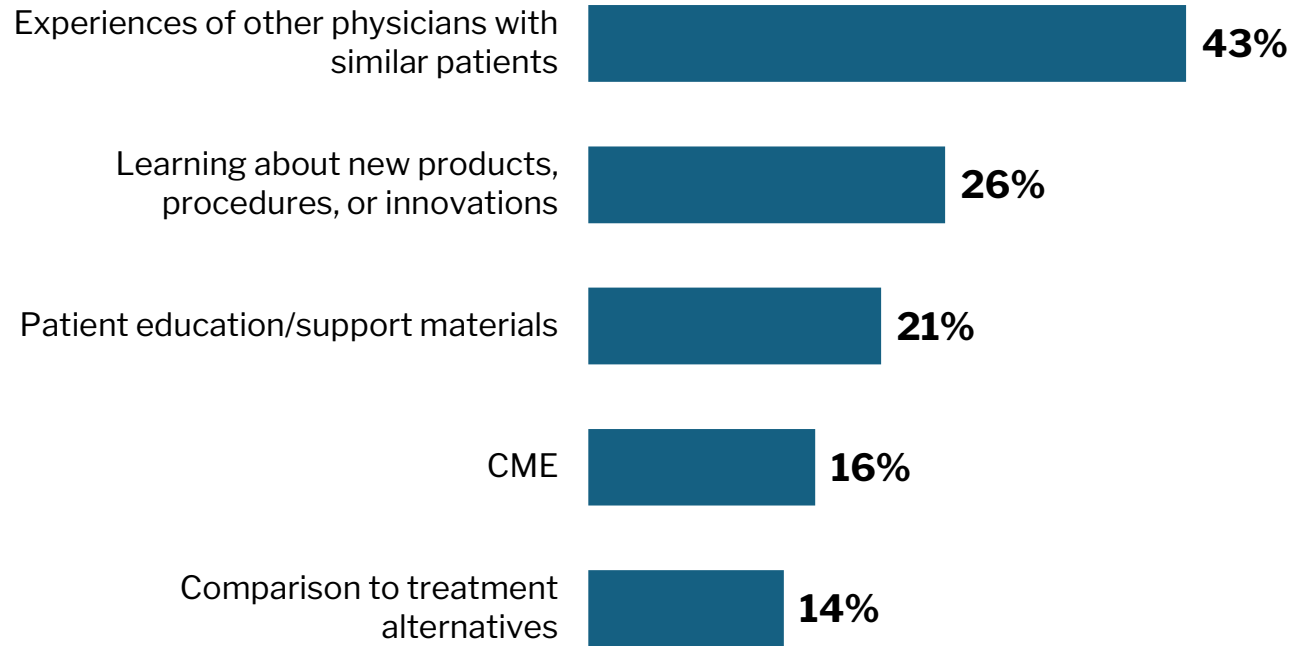
Social connections' potential impact on treatment and prescribing decisions*:

- **73%** said medical publications/journals impact prescribing decisions
- **65%** reported **KOLs and conference meetings** contribute as well
- **57%** of **Colleagues/Peers** impact their treatment / prescribing behavior

*Among social media users with those connections

Messaging physician want on social networks is to hear from others with similar patients and stay up on trends

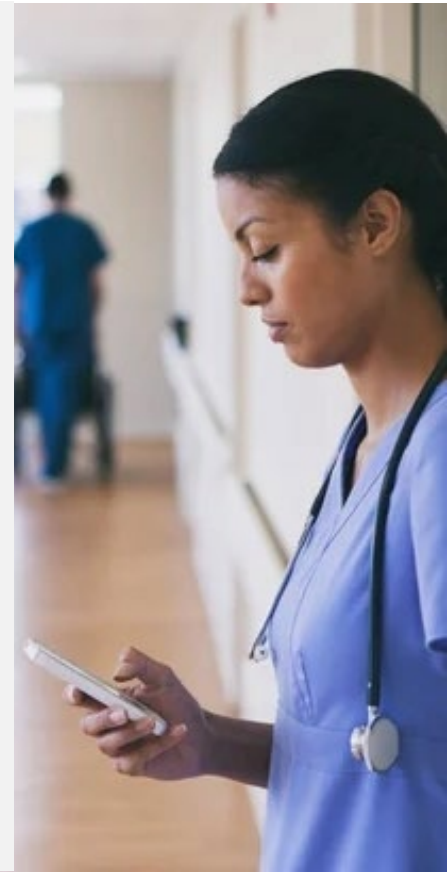
Top 5 Types of Information Like to Acquire Via Social Media



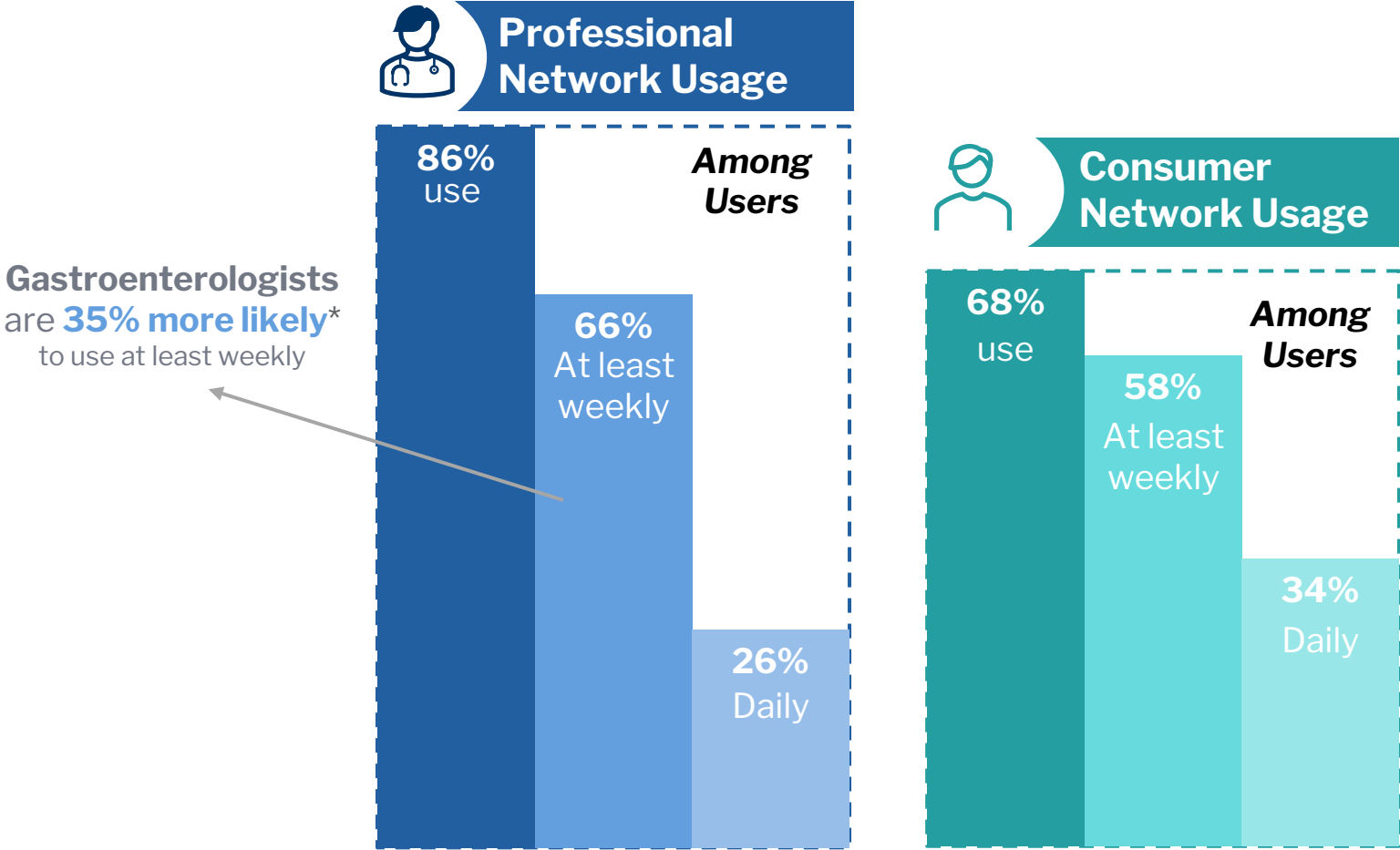
Information ranges by specialty type with:

30% of KOLs want to learn about **new products, procedures, or innovations**

22% of Emergency Medicine want social posts on **Guidance on procedures**



More physicians use professional social networks, but those on consumer ones are more active daily

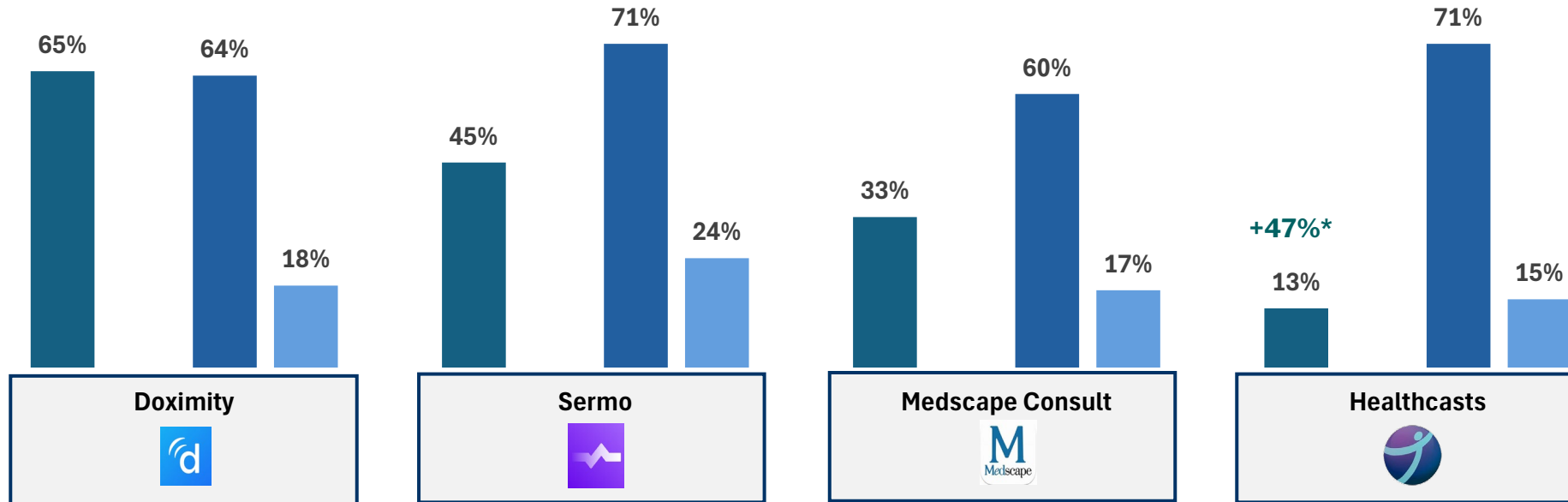


*Compared to total users

Among professional social networks, Doximity leads utilization for KOLs and younger physicians

Frequency Using Social Networks in Past 6 Months

■ Use ■ At Least Weekly ■ At Least Daily



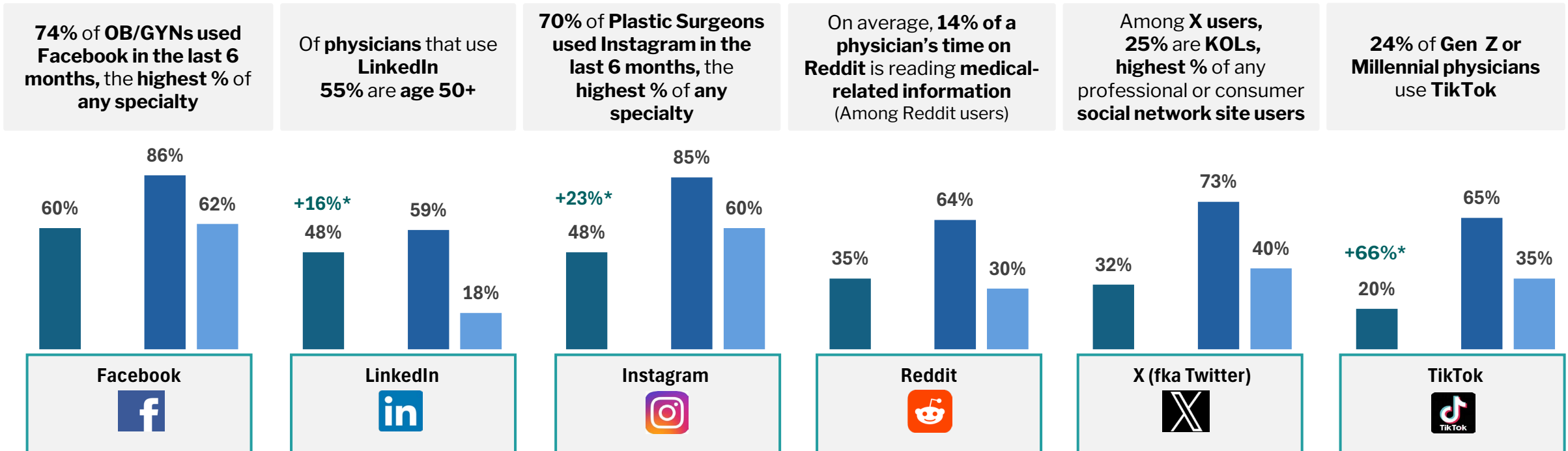
75% of KOLs use Doximity, making it their 4th highest overall media property

Doximity is the most used professional social network among Gen Z or Millennial physicians (68%).

Consumer social networks drive social reach of physicians

Frequency Using Social Networks in Past 6 Months

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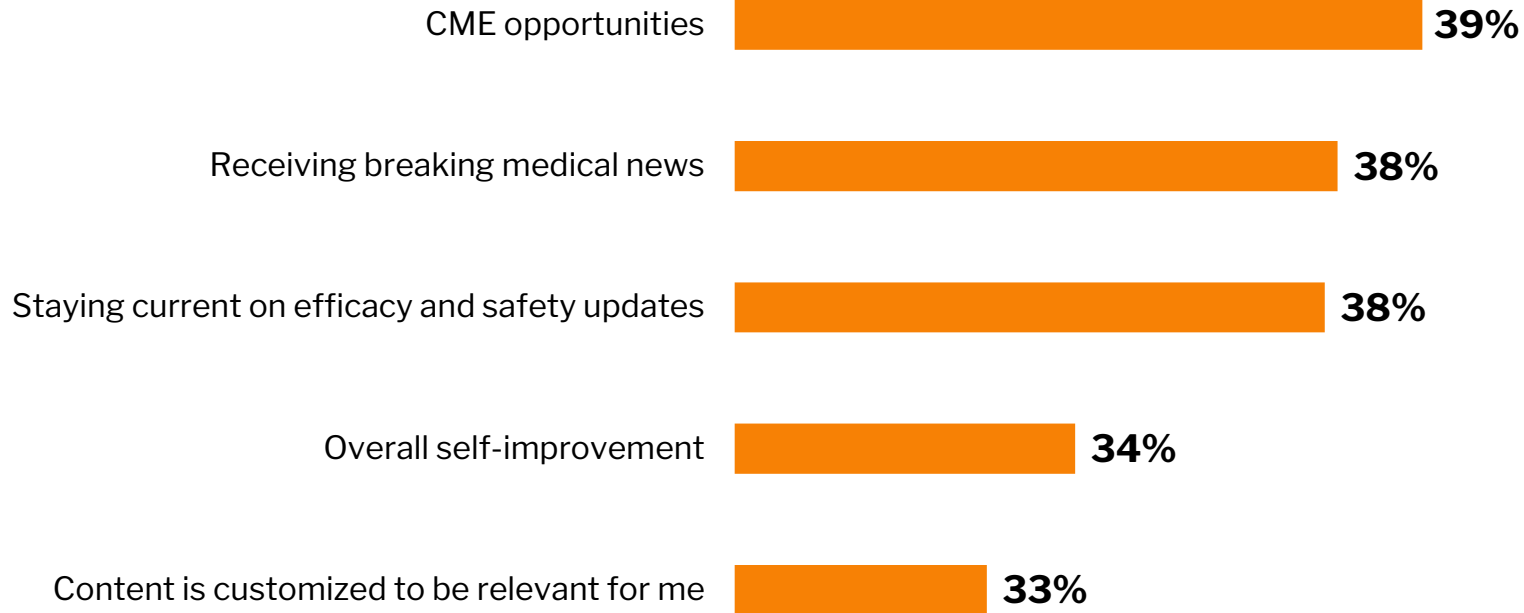


*Comparing from 2021

At Least Daily & At Least Weekly frequency is among site users

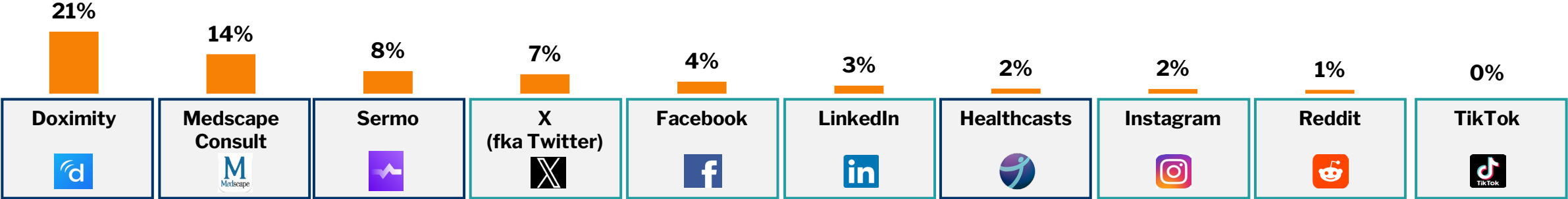
Medical education opportunities and news/updates top the list for why they stay active on social

Top 5 Reasons for Physician Staying Active on Social Media (Among Those Who Use at Least Monthly)



While professional networks are the primary source for breaking medical news, 29% of physicians <45 years old rely on their consumer networks

Social Network Used Most for Breaking Medical News
(Among Those Who Find it an Important Reason)



They take action after reading medical content on social

Top 5 Actions Taken in Last Month After Reading Medical-Related Social Media Posts*

28% 

Search for more information on a topic

23% 

Read responses of others on a **post**

22% 

Click a link to read the full contents of an article/paper on another website

22% 

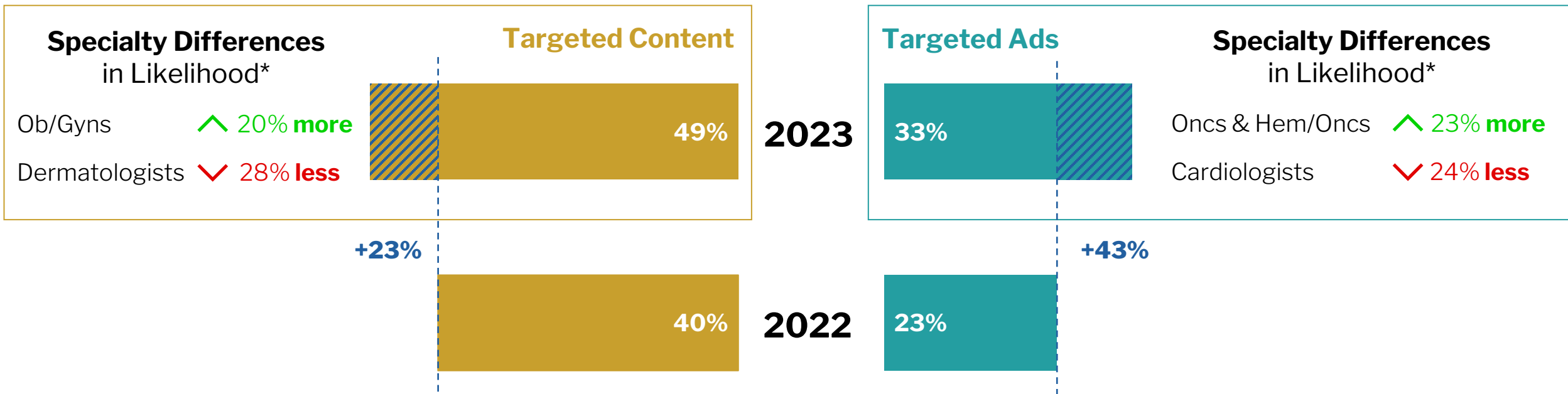
Discuss information **with colleagues/peers** (email, phone, in-person)

16% 

Click to **view a full video**

When it comes to advertising physicians' appetite for being targeted with relevant content and ads is growing

Do Physicians Find Targeting Beneficial?



Physician social experience is about trust



Social for physicians is more about enhancing their knowledge



Physicians are skeptical of medical information shared socially but trusted sources are valuable in treatment decisions



While consumer platforms are where they spend most of their time, professional social is where they are most engaged



Targeted content and messages are becoming more mainstream

M3 MI / Kantar Media Healthcare Research

Your first source for healthcare
media insights and **marketing
intelligence**

M3 MI is the new name for the trusted healthcare data that marketers have relied on for decades to:

- better understand patient and healthcare professional audiences
- set communication strategies
- build media plans
- gain competitive advertising insights

M3 MI's syndicated data is used across agencies, healthcare brands and media properties.

Previously part of Kantar, M3 MI joined M3 USA in 2023. M3 is the market leader in healthcare market research across 27 countries, with ISO certifications reflecting its commitment to transparency and high-quality data.

Industry standard syndicated research for healthcare advertisers, agencies and media



Professional Health Studies

Understand HCP media behaviors, attitudes and decision-making channel consumption

The market's most extensive syndicated research across 35+ physician specialties and other HCP groups. We offer a portfolio of studies to better understand media channels and properties used and develop a multi-channel communication plan.



MARS Consumer Health

Activate patient groups by understanding their health behaviors, attitudes, motivations and media usage

The MARS Consumer Health Study, a database of 40,000 adults across 100 condition groups is the industry's most widely used planning and profiling currency for healthcare insights and advertising.



Ad Intelligence

Competitive ad intelligence and insights for informed decisions

Used by brands, agencies and media to understand the share of voice, strategies and spend among their competitors across media channels.

Thank you

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