



A PRESS GANEY SPECIAL REPORT

DIGITAL CONSUMER TRENDS IN PHARMA 2022



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INTRODUCTION

Historically, brands in the pharmaceutical and life sciences space made little investment outside of the awareness and education phases of the marketing cycle. But consumers today expect more from pharma brands. They want reliable information and a streamlined path to care.

In light of a global pandemic, the digital trends that had gained positive traction pre-COVID are now hardwired into how people make decisions about every step of their care—including medications and treatment options. Consumers are increasingly looking to pharma brands to help them complete their journey to treatment.

Press Ganey recently asked¹ 1,000+ healthcare consumers about their digital behaviors, preferences, and expectations related to pharmaceutical and life sciences brands. From our survey results, five key themes emerged.

Consumers turn to pharma sites for reliable information: In the age of empowered consumers, access to reliable healthcare information has never been more in demand.

Convenience drives conversion: While patients seek out information from multiple digital sources, convenience is key to their decision-making and securing care and treatment.

Online ratings secure trust: Consumers turn to objective online ratings and reviews from peers to inform their decisions about doctors and treatment.

Brands that streamline access win: Consumers reward brands that facilitate their journey to the right care, medications, and, ultimately, optimal health.

Digital transcends generations: Older consumers are catching up to millennials and Gen Z in their digital behaviors and preferences. Successful, forward-thinking brands take a digital- and consumer-first approach to marketing across ages and populations.

Use of the web has been ingrained into the modern-day journey to care. To drive conversions, future-minded brands must reexamine their digital presence and “owned” online properties. From there, they can identify where to bridge existing gaps in the patient journey.

This report provides a deep dive into the trends and insights that will help you attract and convert consumers to meet and exceed your business goals.



Consumers are increasingly looking to pharma brands to help them complete their journey to treatment.

REPORT HIGHLIGHTS

FROM RESEARCH TO RX, THE ROAD IS DIGITAL

Consumers are increasingly online and plugged in—and want pharma brands to meet them where they are.

Nearly **1 in 2** says finding the right doctor is a barrier to treatment

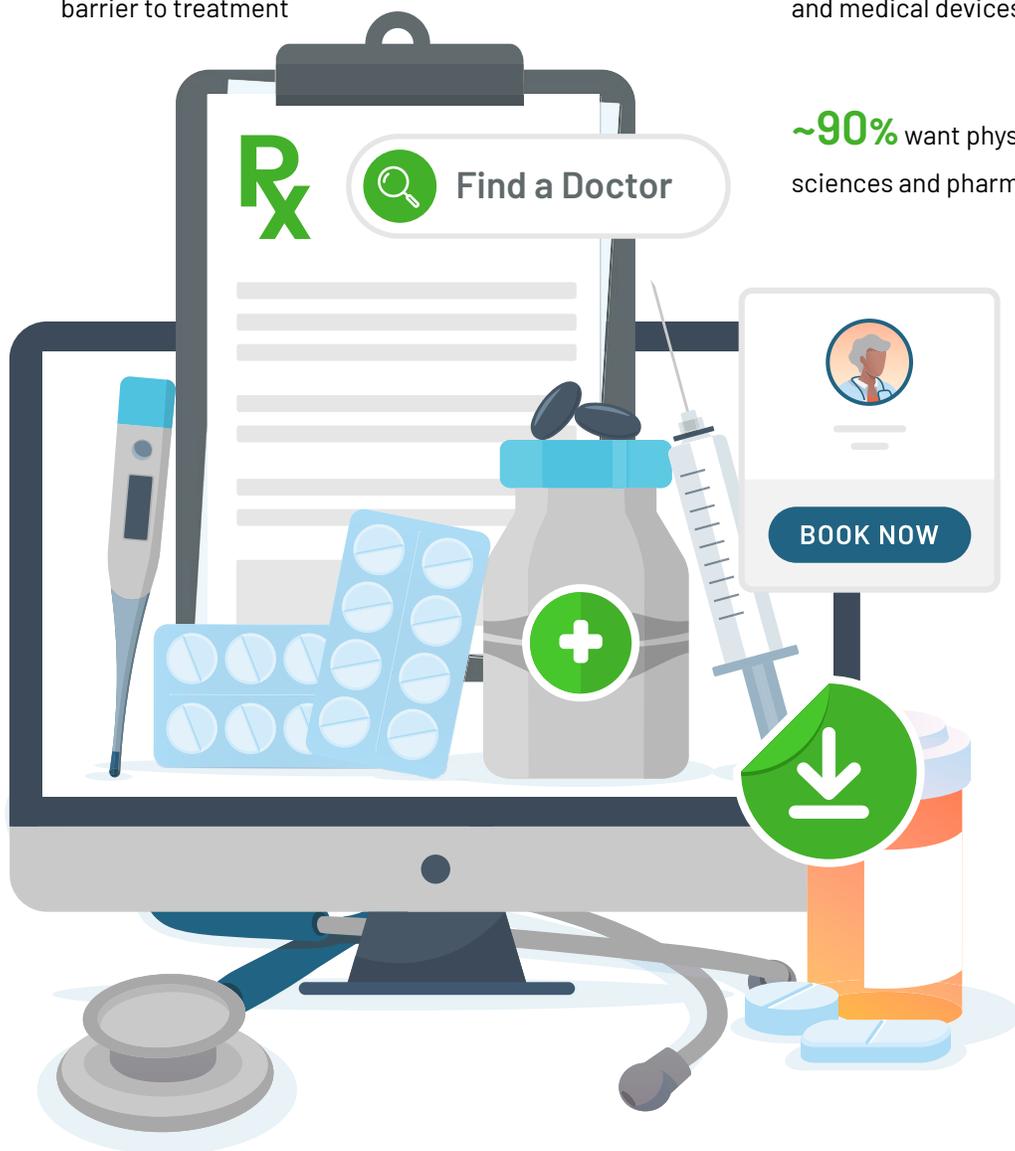
Almost **50%** research prescriptions, medications, and medical devices on brand websites

~90% want physician directories available on life sciences and pharmaceutical sites

83% are more likely to use (or recommend) a brand website that has a doctor directory

Most consumers would prefer a digital appointment scheduling option*

62% are likely to download coupons, discussion guides, and other potentially branded content between booking* and holding an appointment



TRANSFORM YOUR SITE INTO A ONE-STOP SHOP

Patients report that accessing prescriptions and medication is more challenging than ever. Over half (52.8%) say finding the right treatment option is one of the largest hurdles when they're in need—a 17% uptick from 2019.

Pharmaceutical brands have a massive opportunity to leverage their “owned” digital properties as information hubs. Brand websites are a critical resource for patients: Over ¾ (76.1%) have researched a prescription or medication online in the past year—a 4.4% increase over 2019—and almost half have done so directly on a brand website.

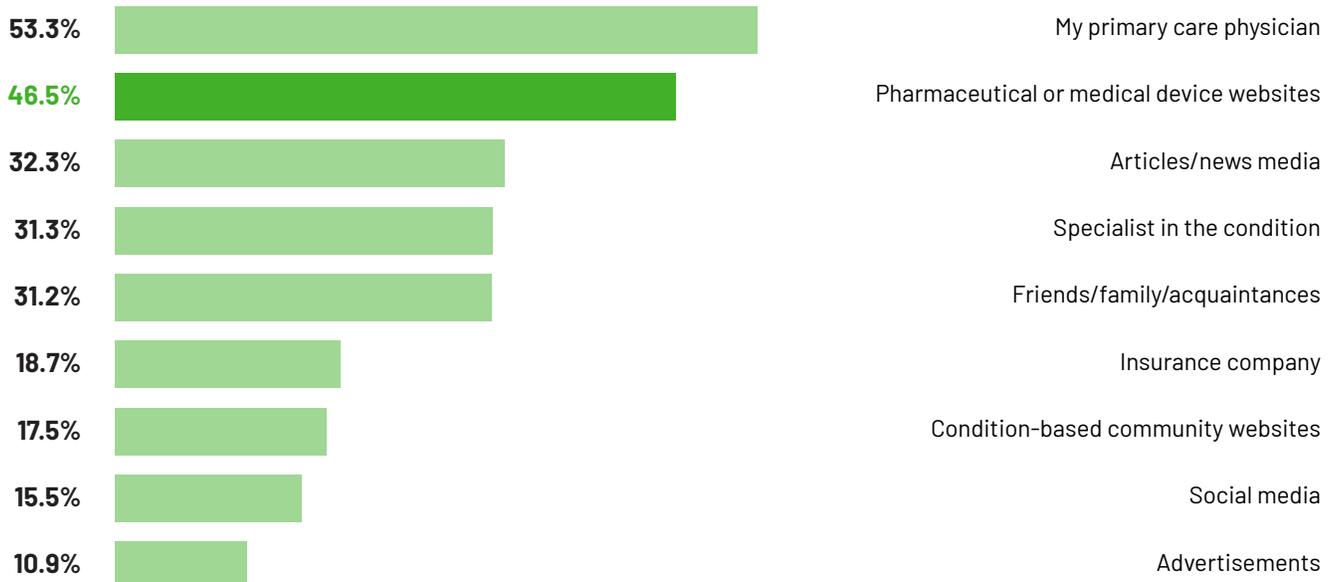
In fact, pharma brand sites are the second-most-relied-on resource for learning about a medication or medical device—neck and neck with primary care providers (46.5% vs. 53.3%, respectively). Articles and news media come in third, slightly above specialists and personal recommendations. Advertisements are used the least.



#2

source of information about prescriptions, medications, and medical devices is a pharma brand's website

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



CONVENIENCE DRIVES CONVERSION

The digital age has raised consumer expectations for fast, reliable access to care. From researching medications or medical devices to finding a doctor who can treat them to scheduling an appointment—and oftentimes conducting the visit itself—every step should be as easy as possible.

89.2% of consumers say they'd find it helpful if a pharma brand's website featured a doctor directory where they can find and learn about providers who treat their conditions. This is up from 88.3% in 2019. While this preference is highest among younger generations (91.7% among millennials and Gen Z), 83.1% of boomers report they'd like pharma brands to feature find-a-doctor directories on their sites too.

The importance of convenience extends to the appointment process. Consumers' preference for digital booking has been steadily climbing in recent years. After finding a doctor through an online directory, more people want to be able to book online than call a doctor's office. In fact, only 18.3% want to call the doctor's office, a 13.4% drop from 2019.



~90%

of consumers want physician directories on pharma brand websites

>50%

would be more loyal to a pharma brand that embedded a physician directory on its site



CONVENIENCE DRIVES CONVERSION

ADOPTION OF TELEMEDICINE IS BOOMING

Prior to the pandemic, telemedicine had seen major gains—many of which have surged in the wake of COVID-19. Use of virtual visits exploded during the pandemic—up 337.6% since 2019.² Pharma brands can seize the moment, capitalizing on this positive momentum to motivate prescription adherence.

Patients, driven by a global healthcare crisis to test-drive telemedicine, have grown comfortable with the technology, and most have found that they enjoy the virtual experience. Over half (54.4%) would be more likely to schedule an appointment with a doctor who offered virtual visits. And 70.6% say the convenience of telemedicine would help them adhere to appointments and manage prescriptions, while just over 65% of people currently taking a prescription medication would be likely to use telemedicine to manage it.



~71%

say the convenience of telemedicine would help them adhere to appointments and manage prescriptions

65%

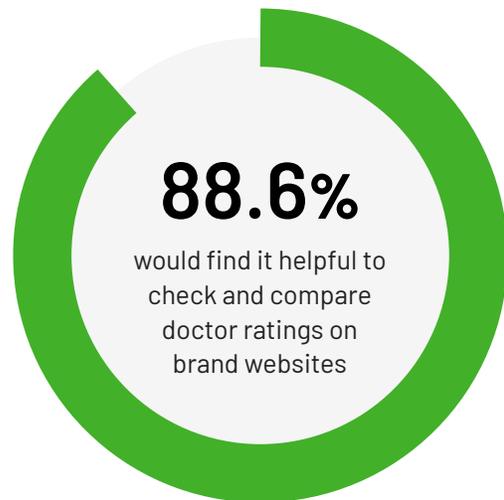
would be likely to use telemedicine to manage their prescriptions



TRANSPARENCY AND HIGH-QUALITY CX MATTER

Embedding physician directories on brand sites improves patients' access to the doctors and specialists who can prescribe the right treatment. But a list of names and locations doesn't go far enough. To deliver a high-quality consumer experience (CX), pharma brands must continually add value to the patient journey at every touchpoint. In the context of directories, this means that listings must be robust and built out to help guide patients' decisions about their care.

In the digital age, ratings and reviews are the new currency of trust. Nearly 90% (88.6%) of patients would find it helpful to check and compare doctor ratings on pharma brand websites, and 95.8% think ratings are somewhat to extremely important in evaluating and choosing a doctor.



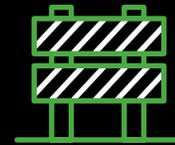
Best-in-class pharma brands

understand what drives patients' decisions and deliver the insights and information they need, when they need it

BRANDS THAT BRIDGE THE GAP BETWEEN PATIENTS AND PROVIDERS WIN

There's no shortage of roadblocks in the patient's path to treatment. 52.8% say "finding the right treatment option" is a challenge when trying to resolve a medical condition. This is followed by "cost or finding a prescription covered by insurance" (47.5%) and "finding the right doctor" (44.2%).

Best-in-class pharma brands capitalize on this opportunity by connecting patients with needed care. And the payoff can be huge. In an era when trust and loyalty are hard to come by, over 50% of consumers say they'd be more loyal to a pharma brand if it helped them access care through a find-a-doctor directory, and 83% say they'd be more likely to use or recommend a brand site that did so. 62% are likely to download coupons, discussion guides, and other potentially branded content between booking and holding an appointment.



44.2%

say "finding the right doctor" is a barrier to treatment

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?

32.2%
UNSURE

16.9%
NO

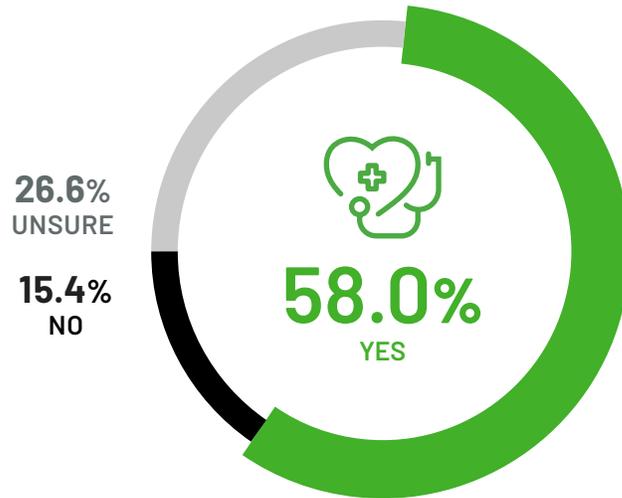
50.9%
YES



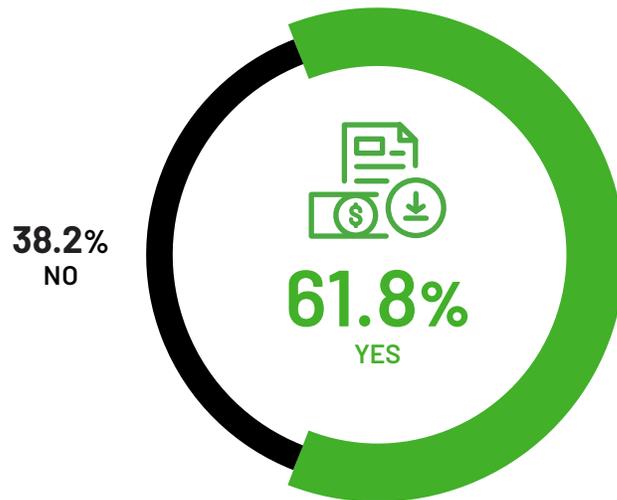
83%

would be more likely to use or recommend a brand site that connected them with physicians

If the 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 doctor*?



Once you've found a doctor and are ready to schedule an appointment, are you more likely to download additional content (like coupons, doctor discussion guides, etc.)?



THE RISE OF DIGITALLY EMPOWERED BABY BOOMERS

The rise of digital tech bridges generations. Today, older consumers are more comfortable using the web to make decisions about care and treatment. 69.3% of respondents over age 60 have gone online to research a prescription medication or medical device in the past year. Brand websites are the second-most-used resource for this information, falling just short of primary care physicians (52.9% vs. 59.1%, respectively).

For those over 60, 83.1% would find it helpful if a brand's website contained a physician directory—up from 78.8% in 2019. And 74% would be more likely to use or recommend a website that included a find-a-doctor directory.



~70%

over 60 have researched a prescription medication or medical device online in the past year

What are the biggest challenges you face when trying to find a treatment or prescription for a medical condition? (Respondents over 60.)

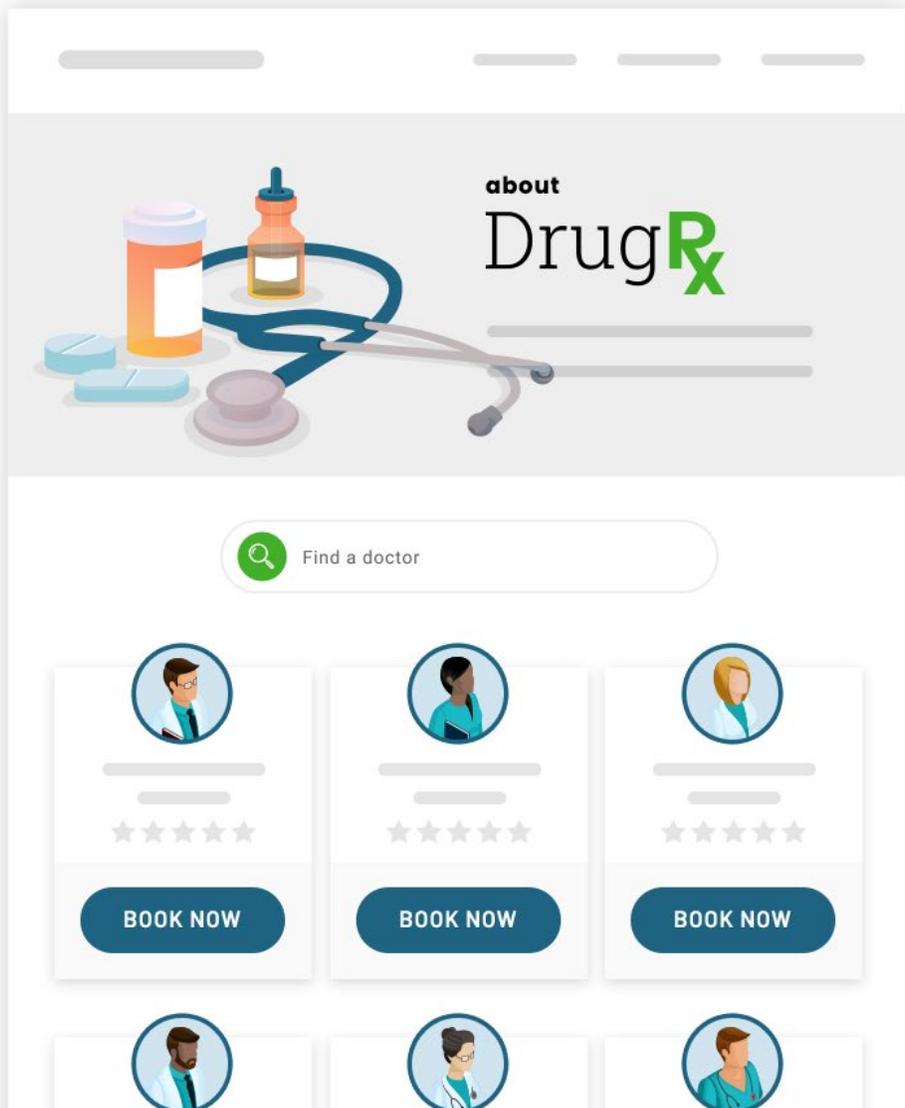
55.4% Finding the right treatment options (something that works for you)

41.3% Finding the right doctor (someone who specializes in the condition, takes your insurance, speaks your language, and is within a reasonable travel distance)

34.7% Cost or finding a prescription covered by your insurance

23.6% Having to explain or describe your condition to front-office staff

17.8% Scheduling an appointment



83.1%

over 60 agree that it would be helpful if a pharma brand website had a directory of doctors able to treat a particular condition



74%

over 60 say they are more likely to use or recommend a pharma brand website if it could connect people with a health specialist



94.6%

over 60 say doctor ratings and reviews are somewhat to extremely important in evaluating a potential new doctor

KEY CONSIDERATIONS

Even as pharmaceutical and life sciences brands navigate these uncharted waters, the importance of digital properties has become crystal clear. Driving business growth in the digital age means playing an active role in the path to treatment.

Build a “walled garden”: Pharma websites provide a critical point of entry to the patient journey. Brands can strategically leverage their own digital properties to add value in the form of robust, reliable information and rich content to help patients make decisions about care.

Capitalize on “magic moments”: Pharma brands can streamline the journey to treatment by giving consumers the tools and technologies to research their options and book appointments at the exact moment your product is top of mind.

You can’t shortcut loyalty: Taking steps to help consumers connect with care providers and restore their health can pay off big for pharma brands.

Become an ally in the pursuit of care: Patients are empowered to play a more active role in their health. Pharmaceutical companies can provide guidance by equipping patients with the tools to make informed decisions and help them through the critical “last mile” of an often stressful journey.

All ages are plugged in: Strategically investing in digital tools is necessary regardless of your target demographic to engage patients and caretakers across generations.

**TRANSFORM
THE CONSUMER
EXPERIENCE**

To learn more about Press Ganey’s industry-leading solutions for the life sciences, visit:

pressganey.com/pharma

SURVEY METHODOLOGY

This survey depicts findings from 1,126 respondents who represent the U.S. adult census demographic of regions, incomes, and genders, age 18 to 60+. Research was commissioned by Press Ganey and conducted through an independent third-party market research agency in the second half of 2021.

GENDER DATA	REGION DATA	HOUSEHOLD INCOME
Male: 47.16%	East North Central: 15.34%	< \$9,999: 8.17%
Female: 52.84%	East South Central: 5.51%	\$10,000-\$24,999: 10.66%
	Middle Atlantic: 13.45%	\$25,000-\$49,999: 19.54%
	Mountain: 7.04%	\$50,000-\$74,999: 18.21%
	New England: 4.69%	\$75,000-\$99,999: 13.59%
	Pacific: 16.79%	\$100,000-\$124,999: 6.93%
	South Atlantic: 20.22%	\$125,000-\$149,999: 4.62%
	West North Central: 6.23%	\$150,000-\$174,999: 3.29%
	West South Central: 10.74%	\$175,000-\$199,999: 1.33%
		> \$200,000: 3.82%
		Prefer not to answer: 9.86%

AGE DATA
18-29: 23.80%
30-44: 21.23%
45-60: 33.48%
> 60: 21.49%



ABOUT PRESS GANEY

Press Ganey invented the healthcare performance improvement movement over 35 years ago. Today it offers an integrated suite of solutions that address safety, clinical excellence, patient experience, and workforce engagement. The company works with more than 41,000 healthcare facilities in its mission to reduce patient suffering and enhance caregiver resilience to improve the overall safety, quality, and experience of care.