



White paper

Bridging the gap

Synchronizing HCP & DTC messaging
for better outcomes

Introduction

The misalignment between doctors and patients remains a consistently unsolved issue in healthcare. The problem has been exacerbated by ever-shrinking appointment times for discussion, and ever-growing information overload on both sides. Despite the best intentions, advances in communication tools and medical technologies – and the enormous effort and investment of brands to educate and market to doctors and patients – misalignment means patients and doctors can have different goals, expectations and assumptions. Conversations can be frustrating and ultimately ineffective for both parties' purposes, and for their end goal: better outcomes.



Doctors know it:

70% of doctors say DTC/HCP alignment streamlines care¹

13% say that alignment is strong¹

All the investment in the world would not work if the messages the two sides are getting do not help to align them for a productive conversation. Sharecare demonstrated that synergistic messaging provided a stronger ROI on campaigns from Rx brands ranging from neurology to oncology to gastroenterology than siloed DTC/HCP campaigns. In fact, we delivered a **25:1 ROI** and **\$44M** in incremental revenue for a multiple sclerosis Rx franchise driven by overlap between the HCP and DTC promotions.²

Where are the points of misalignment greatest? When do they happen? What would help patients feel most in sync with their doctors? How can we help our life sciences partners unify marketing efforts and messaging to achieve script lift and better ROI? To answer these questions and more, we surveyed doctors and patients and conducted multiple focus groups of both cohorts.

Research overview

Quantitative surveys	Qualitative focus groups
3180 patient respondents, 31+ chronic health conditions	11 patients, 12 chronic health conditions
419 physician respondents, 13+ specialties	8 currently practicing physicians, 7 specialties

Research goals

- 1 Quantify the pervasiveness of physician-patient misalignment
- 2 Understand the impact of physician-patient goal misalignment to help healthcare marketers bridge communication gaps
- 3 Investigate where thematic gaps persist to support future alignment

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40-80%

of medical information provided by healthcare practitioners is forgotten by the patient] immediately. Furthermore, almost half of the information that is remembered is incorrect.”³

“

Barriers to the effective use of medicines specifically include poor provider-patient communication, inadequate knowledge about a drug and its use, not being convinced of the need for treatment, fear of adverse effects of the drug.”⁴

The bright side...

Where doctors and patients are in sync

It's not all bad news. There are many ways in which doctors and patients remain aligned and productive, as evidenced not only by successfully treated patients, but also by the responses in our research and the results from our synchronized brand campaigns from our life sciences partners.



Doctors and patients do believe themselves to be largely in sync, thanks to their own efforts and those of the wider healthcare community. Patients are more empowered than ever and are using that to create true partnerships with their doctors.

Efforts like patient education programs, digital health tools, and patient-centric campaigns are making a difference. In a recent survey, five more than half of psychiatrists stated that DTC advertising assisted in their conversations with patients, and in another 53% of doctors and 54% of consumers agreed.

Top shared office visit goals for doctors and patients

- General check-up
- Discuss insurance issues
- Learn about/discuss new treatment options
- Give/get reassurance from the doctor that patient is on track

Top shared patient resource needs and physician provided

- Access to records of the visit
- Visuals that show how treatments/conditions work
- Information pamphlets on treatments
- Patient visit feedback survey
- Insurance navigation information

...and the need for improvement

Doctor-patient communication gaps do exist

Despite progress and successes, we all know things are not perfect. With increasing demand on services and decreasing resources, the need for effective, productive doctor-patient communication is critical.



In a study investigating how well patients were informed related to a surgical consent, only remembered an average of 25% of the information.⁷

US Department of Education's National Assessment of Adult Literacy report, The Health Literacy of America's Adults looked at tasks like filling out a patient information form, understanding dosing instructions, identifying signs and symptoms of health problems, and being able to give informed consent for a healthcare service.⁸

“Only 12% of American adults were rated “proficient”

53%
intermediate

36%
basic/below basic



\$8,000

additional cost per patient to the American healthcare system due to limited health literacy.⁹



“

Doctors have tried to explain to me the conditions and even when they explain it, they're explaining it with medical language, and I say, 'okay, I get it,' even when I don't. I tend to sometimes get confused, especially with something like psoriasis, or where it's intestinal, or explaining why your autoimmune, when your body's not reacting well to certain things.”

Patient - Psoriasis, Crohn's Disease



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“I treat diabetes, which is mostly under the patient's control, and it's very labor-intensive, and everything has to be explained and everything has to be put in a certain order for the patients to go home and be able to follow a multitude of instructions and routine. If you don't work on all these different planes, we're not going to achieve what is required Physician, of us to achieve in terms of the A1C.”

Physician - Endocrinologist

Gaps present alignment opportunities

Patients and doctors go into appointments with goals, values, priorities and expectations that don't always match. As a result, both can end up dissatisfied and frustrated, and the condition at the center of the visit may not be addressed fully.

We identified these discrepancies in both quantitative and qualitative research, because finding these gaps is the first step toward addressing them.

Appointment discussion goals misalignment:

Top physician priorities Data/analytical	Top patient priorities Emotion/lifestyle/personal
Discuss how treatment works 76% more than patients	Discuss emotional affects 100% more than doctors
Order new diagnostic tests Nearly 60% more than patients	Discuss relationships impact 75% more than doctors
Discuss side effects 45% more than patients	Discuss lifestyle impacts 40% more than doctors
Discuss test results 32% more than patients	Reassurance about condition management 24% more than doctors

Patient resource needs	Disparity of patient resource needs vs. physician provided resources	Physician provided resources
69%	Doctor/patient discussion guide 41% disparity	28%
59%	Patient-friendly videos explaining science of condition 39% disparity	20%
56%	Information to help patients navigate insurance 28% disparity	28%
85%	Information pamphlets on conditions 26% disparity	59%

The patient perspective

– Negative experiences

"It seems like they're an authority. You don't want to get them mad at you. Sometimes I'm intimidated, like with a police officer."

Rheumatoid arthritis

"I want my doctor to talk to me as more of an advisor than a dictator."

COPD, atrial fibrillation

"They just feel like they're the smartest person in the room. So I find that in disagreements I tend to just let them win."

Psoriasis, Crohn's disease

"Sometimes I get upset at the doctors office and think, 'I didn't come here to be upset, I came here to be helped, not made more anxious.'"

Type 2 diabetes

+ Positive experiences

"I look at my doctor as the coach, and I'm the player. I listen to him. That's why I go to him. That's why I have a relationship with him: for his guidance. It's a team effort."

Type 2 Diabetes

"It's a team effort. He's not above me, and I'm not below him. I made that clear on my first visit, and he said, 'No problem.' I listed my symptoms, and he actually listened."

COPD, atrial fibrillation

"It's physically and mentally important for us to be able... to trust what they're doing for us, and trust that they do have the 'us' in mind, our well-being in mind."

COPD

The doctor perspective



Recent doctor surveys found 1 that more than **80%** of patients arrived to visits uninformed; but, **70%** said that when patient information aligned with the information doctors receive from brands, care conversations become more streamlined and effective.

"When there's misalignment from the outset, that leads to a more adversarial patient-doctor relationship than a partnership, and then there's the cost of having to repair that."

Dermatologist

"For me the best patient is a patient that's cooperative, that is willing to take the information that I give them, apply it correctly, call when they have a question, and cooperate in order to benefit the outcome."

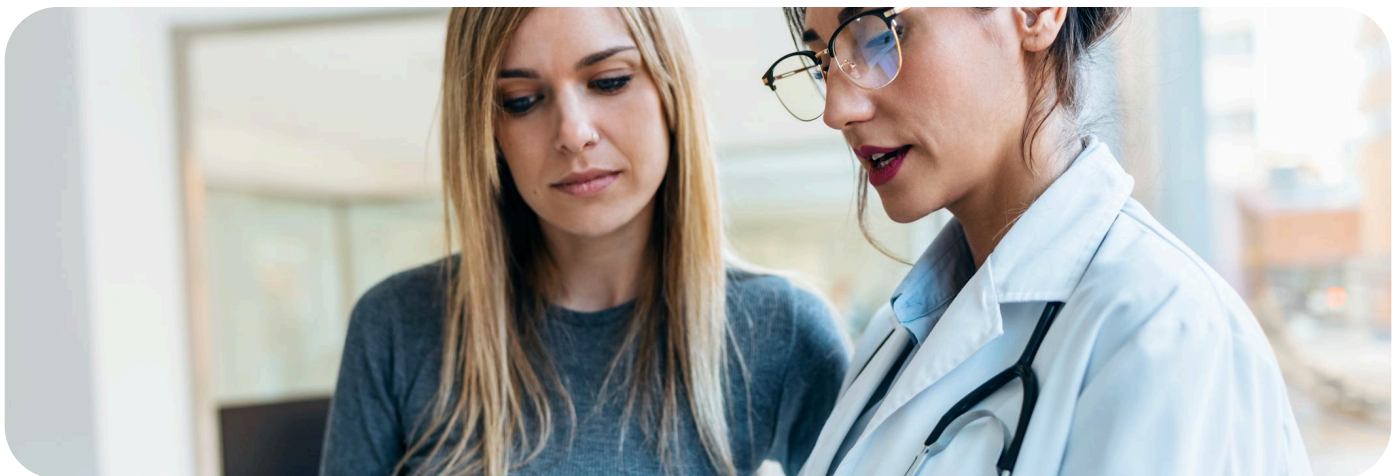
Endocrinologist

"[We] see what the patient needs and what their goals are for the visit. I've found if you establish that up front, it's more likely that their expectations will be met, and the visit will go well."

Neurologist

"My heart soars... when they get the diagnosis right in their pre-research, so they come in educated about it, and you're not starting from scratch. It creates a foundation you can build on together, and you have a discussion and dialogue built on that foundation."

Dermatologist



The brand perspective

This research validates why brands have been coming to us asking for help aligning doctor-patient communications. Whether in brand briefs, RFPs, or in direct conversations, across all levels within brand and agency partners, the trend for Rx marketing is for more HCP-DTC alignment.



"Merge consumer and HCP offerings into a cohesive integrated plan."

"A more connected and synergistic approach to engaging potential patients and healthcare practitioners in their respective journeys."

"Ways to bridge the discussion between HCP and patient."

"DTC/HCP targeting synergies and more coordination with our messaging."

"Reach and engage HCPs and DTCs that are aligned."

"Synchronize HCP and DTC educational efforts."

"Huge appetite for HCP/DTC synergies."

"Opportunities for DTC/HCP synergy that drive meaningful conversation."

The ticking clock

Doctor-patient gaps along the health continuum

In one of our most significant findings, we found that patients become disillusioned **1-5 years+** after diagnosis, well into the chronic condition management phase, with goals and priorities becoming less aligned with their physicians.

Today's empowered patients will not hesitate to move on when they feel that they are not being adequately cared for by their provider.



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When it comes to disagreement, I'll see if I can buy some time to follow it up at the next appointment. But really, what I'm thinking of is probably switching doctors and going more radical, maybe trying to find someone who will be more on my side than against me.”

Patient - Psoriasis, Crohn's disease

This is reflected in recent data from Accenture 10 finding that **~25%** of patients selected a new provider because they were dissatisfied with their care. This was particularly true for those under age **~40**, who were **6X** more likely to switch providers than older patients.

The physicians we spoke with all agreed – they want all patients, no matter the length of time with their conditions, to come in prepared with the same thing:

1 Medication list

2 Changes in adherence and compliance

3 Medical history

4 Symptom list/tracking

5 Any changes since last appointment

The good news: **42%** of all patients surveyed, from newly diagnosed to **1-5 years+** since diagnosis, write down a list of questions, and **43%** write down a list of concerns to discuss with their physicians at their next appointments. However, our research found significant differences in physician appointment preparation between newly diagnosed patients and patients diagnosed **1-5 years+**.



Newly diagnosed patients	VS	Chronic condition patients
69% more likely to print info from internet to go over with doctor		41% more likely to use a tracker or log to keep track of symptoms/results
46% more likely to look up info related to understanding condition		20% more likely to look up info related to understanding treatment
41% more likely to look up how to have a conversation with their doctor		23% more likely to take no action at all
46% more likely to watch videos to better understand my condition		14% more likely to research insurance information

Opportunity for patient-physician alignment

Better communication, health outcomes, ROI

The opportunity is clear for brands: when they can offer information that addresses both patients' and doctors' concerns, and when they can offer that information in times and places to ensure that both parties come informed to their next discussion, those patients can feel seen and satisfied, doctors can use their limited time to communicate more effectively, and those brands can bridge the gap, align their audiences, and successfully convey important information to improve patients' lives.

To feel more aligned, patients want more emotional needs addressed. But doctors are scientists, and they're locked in to hit the right data points in their limited time.

Right now, those mindsets are **out of alignment...** but they don't have to be.



In an increasingly noisy environment, successful pharma brands will be those who synchronize the information they provide to both doctors and patients, helping doctors to value and communicate both clinical data points as well as more psychological and environmental measures of treatment success.

This harkens back to a [research report](#) Sharecare published last year on the importance of mental health in improving outcomes.

By ensuring both parties receive consistent messaging, brands can help create a healthcare environment that is more supportive, aligned, and productive, and increase script lift in the process.

Better appointments. Better health outcomes. Better ROI.

Unified customer experiences

Agreement comes from across the industry, but many are quick to note extensive challenges. It is possible, however, to synchronize HCP/DTC strategies in a HIPAA-compliant, cost-effective way. To achieve success, brands should work with partners that offer synergistic DTC/HCP content and product experiences designed to elevate awareness, ROI, and health outcomes.

Pharma brands can support doctors and patients through marketing efforts that enhance aligned goals and priorities, and offer resources to ensure successful doctor-patient relationships:



Break down silos and align marketing efforts between HCP and DTC marketing teams across brands and agencies.



Align advertising creative to highlight shared goals and what each cohort can do to support the other.



Leverage data: Go beyond NPI lists of top prescribers and expand targeting NPIs of the patients targeted in your DTC campaigns.



Partner with organizations that offer synergistic content programs and products that educate patients and HCPs on building stronger, long-term, supportive relationships.



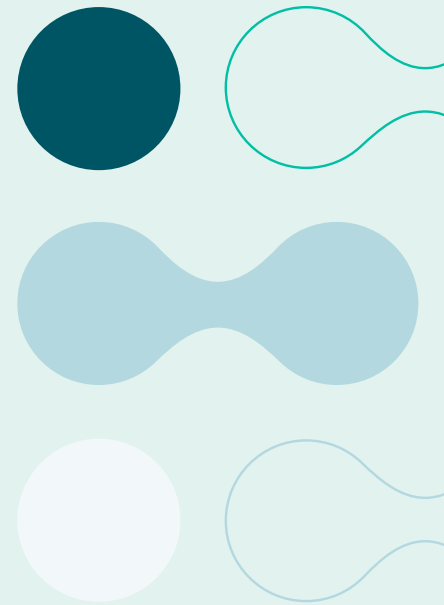
Remember, HCPs are consumers too. Remind HCPs to step into the shoes of their patients who are often overwhelmed, struggling with health literacy, and need accessible information, to aid in treatment adherence and compliance.



Work with partners with product and data innovations that can help measure synergistic campaigns and programs.

Sharecare's unified customer experience is our commitment to highly personalized experiences with an omnichannel approach, reaching patients and HCPs wherever they are in their health journeys.

Everything we do we approach with confidence, conviction, and care, from our zero-party consumer data and the physicians in our network, to the programs and products we develop to help our life sciences partners achieve their goals and deliver ROI.



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The best situation for me is when patients have done their research, come up with a drug, and they mention that drug to me – and then, if that drug is appropriate, that's wonderful. Because then I know they're going to be compliant. They're engaged, they're involved, they're cooperative: all of those things that I need.”

Gastroenterologist

Together, we can help patients and physicians achieve better health outcomes and bridge the gap for HCP-DTC marketing efforts.

About Sharecare

Sharecare is the leading digital health company that helps people – no matter where they are in their health journey – unify and manage all their health in one place. Our comprehensive and data-driven virtual health platform is designed to help people, providers, employers, health plans, government organizations, and communities optimize individual and population-wide well-being by driving positive behavior change. Driven by our philosophy that we are all together better, at Sharecare, we are committed to supporting each individual through the lens of their personal health and making high-quality care more accessible and affordable for everyone.

Research methodology:

Sharecare Communication Gap Patient Survey:

- July 1st- August 18th, 2024, 3180 respondents, including the following conditions: High Blood Pressure, Diabetes, High Cholesterol, Anxiety Disorder(s), Major Depression, Rheumatoid Arthritis, Migraines, COPD, Heart Disease (e.g., congestive heart failure, A-Fib), Asthma, Cancer, Osteoporosis, Other Mental/Behavioral Health Disorders (e.g., Bipolar Disorder, Schizophrenia, etc.), Ophthalmologic Conditions (e.g. Cataracts, Glaucoma, Age-Related Macular Degeneration, etc.), Kidney Disease, Stroke, Eczema/Dermatitis, Neurological Disorders (Parkinson's Disease, Alzheimer's, Epilepsy etc.), Psoriatic Arthritis, Psoriasis, Multiple Sclerosis, Ulcerative Colitis, Crohn's Disease

Sharecare Communication Gap Physician Survey:

- August 1st-August 5th, 2024, 419 respondents including the following specialties: General Practice/Internal Medicine, Dermatology, Rheumatology, Cardiology, Neurology, Psychiatry, Hematology/Oncology, Urology, Pulmonology, Gastroenterology, Endocrinology

Sharecare Patient Experience Lab Patient Focus Groups:

- 2 groups conducted on August 9th, 2024, 11 patients, A40-65, including the following conditions: COPD, Asthma, RA, A-Fib, T2D, PsA, Congestive Heart Failure, Psoriasis, Migraines, Crohn's Disease, Multiple Myeloma, Chronic Kidney Disease

Sharecare Patient Experience Lab Physician Focus Groups:

- 2 groups conducted on August 14th, 2024, 8 practicing physicians, including the following specialties: Endocrinology, Gastroenterology, Dermatology, Neurology, Urology, Oncology, OBGYN

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Contact:



Denise Esakoff, Sharecare
SVP, Strategic Performance
denise.esakoff@sharecare.com
908-303-2033



Michael Lepow, Sharecare
VP, Marketing Strategy and Consumer Insights
michael.lepow@sharecare.com
917-923-8755