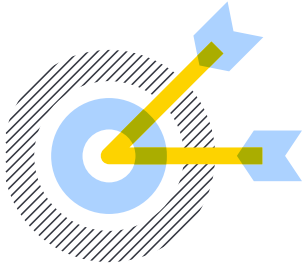




# Pharma Advertising Research

June 2020





# Overview

**Research objectives,  
methodology & sample**

**Main results**

Publications

Advertising

# Research objectives & methodology

## Objectives

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Understand clinicians' behaviour and attitudes towards **scientific journals** and its **advertising**; and the influence that advertising has on their practice.

## Methodology

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A 10 minute online survey with **primary care clinicians and specialists** who read **medical scientific journals**.

The sample was comprised of members of the Elsevier Health Panel and contacts from internal email databases.

### **Participation was incentivized with:**

- \$2 charity donation to MSF, Unicef or WWF, up to a total of \$1,000
- Entry into a prize draw to win one of three \$100 vouchers (or equivalent in £, \$, € or ¥)
- 300 panel points for Health Panelists

Fieldwork was carried out between February and March 2020.

# A total of 1814 physicians completed the research, sourced from the Health Panel and Elsevier internal lists

## 1814

physicians globally responded to a survey in February and March 2020.

Equal weight was given to each of the three regions in the analysis.

Most respondents globally were medical specialists

**17%** Primary care clinicians

**69%** Medical specialists

**14%** Trainee doctors

## 324

USA

## 1105

Europe

## 385

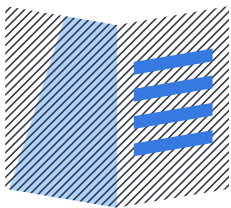
APAC

The market data was weighted to give regional and global figures as follows:

Global	1814	
USA	324	33.3%
Europe	1105	33.3%
UK	119	16.7%
France	248	16.7%
Germany	226	16.7%
Spain	206	16.7%
Italy	229	16.7%
Poland	77	16.7%
APAC	385	33.3%
ANZ	91	33.3%
India	241	33.3%
China	53	33.3%



Weighting efficiencies: Global: 75.3%, EMEALA: 83.0%, APAC: 68.7%



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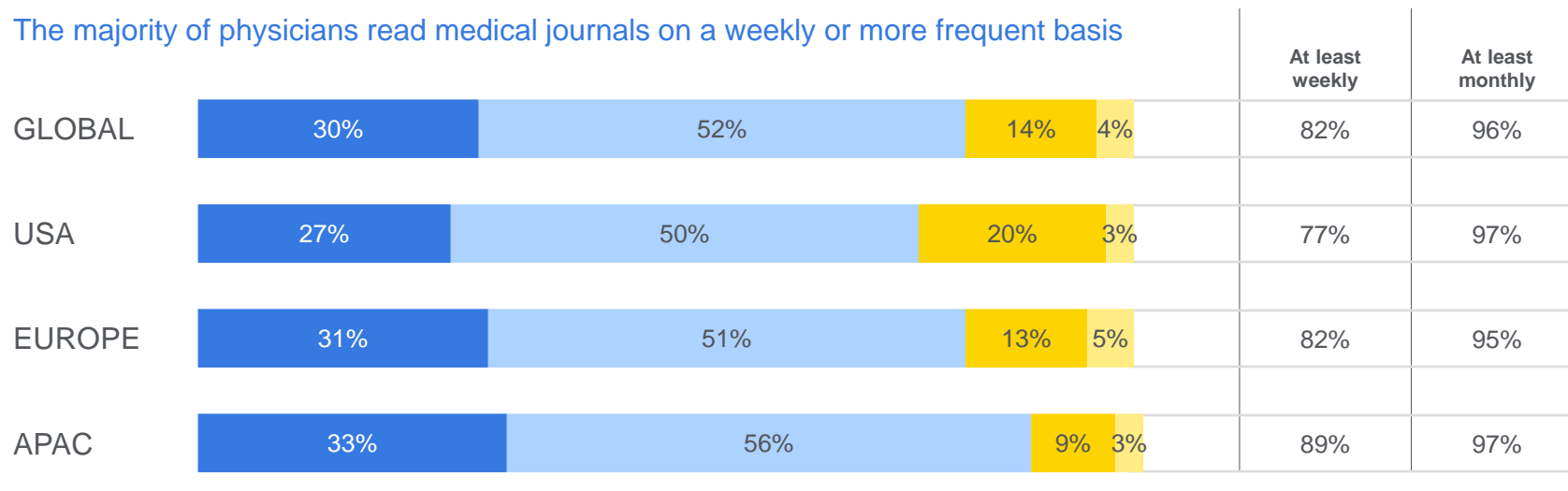
Main results

**Publications**

Advertising

# Frequency of reading medical scientific journals

The majority of physicians read medical journals on a weekly or more frequent basis



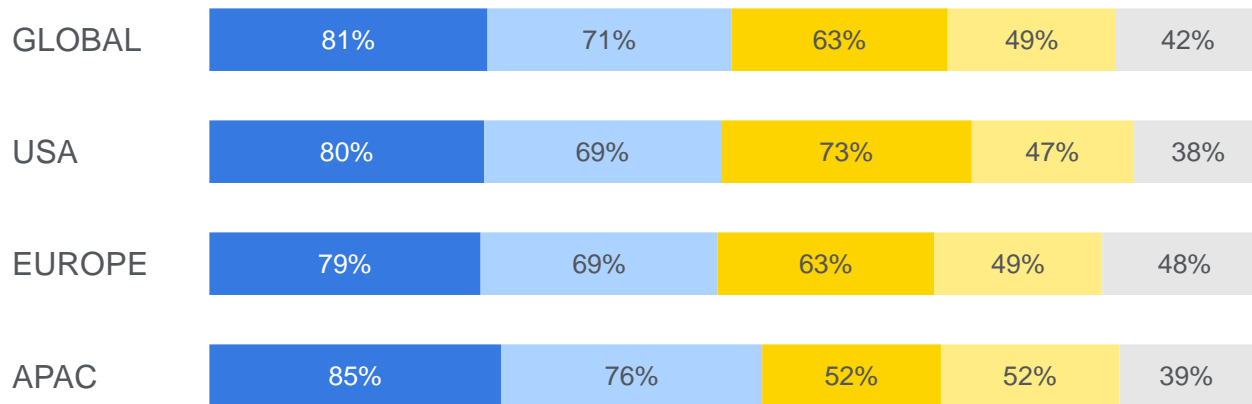
■ Daily  
 ■ Weekly  
 ■ Monthly  
 ■ Less than monthly



Source: Q01a – How often do you read medical scientific journals (either in print, online or in app format)?  
 Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)

# Resources accessed when reading medical journals

Medical journals are most commonly accessed through their online versions, with exceptions of Germany and China, where print versions and medical reference portals are accessed the most respectively.



## USA

80% read digital  
73% read print

## Europe

79% digital  
63% print

## APAC

85% digital  
52% print

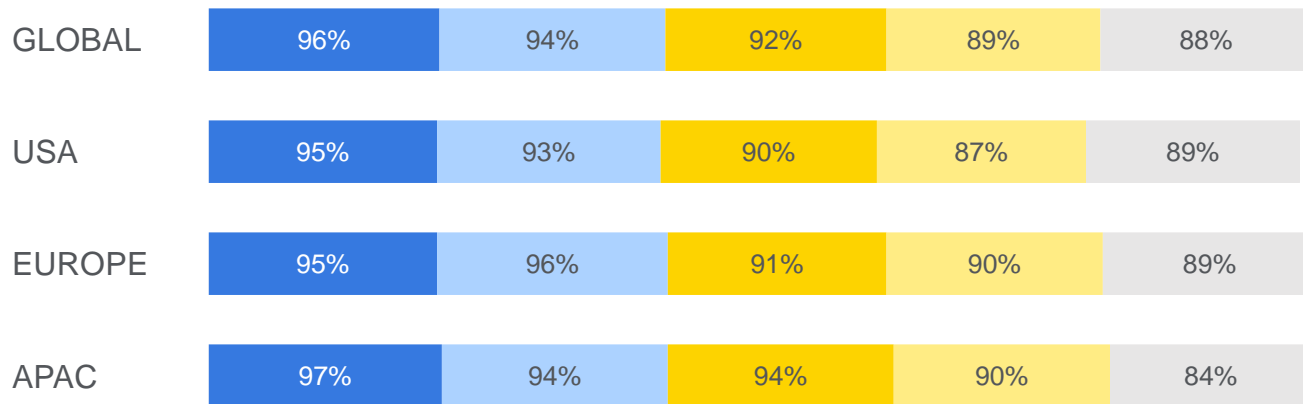
- Medical journals: online version
- Medical reference portals
- Medical journals: print version
- Journals digital edition
- Medical society websites



Source: Q03 – From the list below, please indicate which resources you access to read medical journals...  
Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)

# How physicians stay well informed of new medical developments

The top resources accessed are medical reference portals, online medical journals, digital journal editions and print journals.



- Medical reference portals
- Medical journals: online version
- Digital journal editions (dynamic PDF format of the full journal issue)
- Medical journals: print version
- Medical society websites

Digital journal editions are particularly important in:

97%

Spain

95%

India

93%

ANZ

94%

China

\*Low base size (<25)

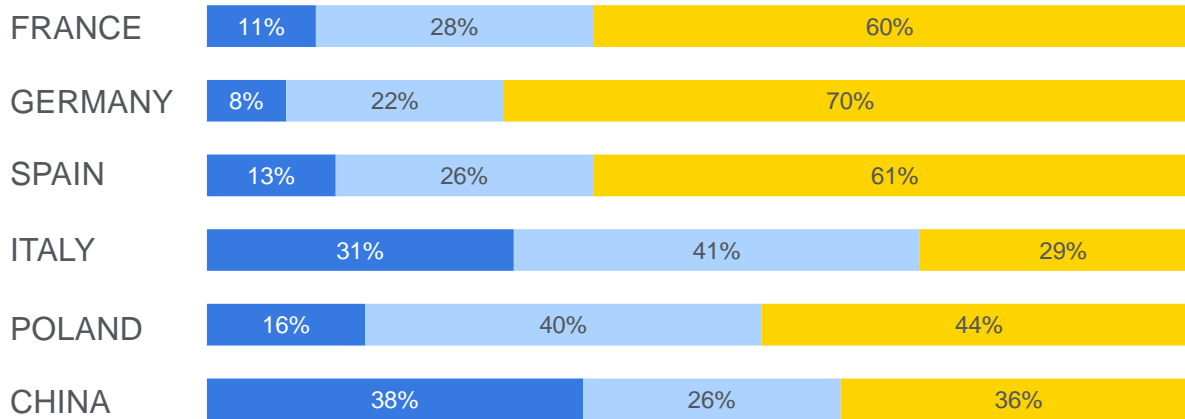


Source: Q04 – How important are each of the following sources for helping you stay well informed about new medical developments? (5 point scale from not at all important to extremely important)  
Base: physicians accessing medical journals through each source (see notes)



# Language usage and preference when reading medical information

Preference for local language is strongest among physicians in France, Germany and Spain.

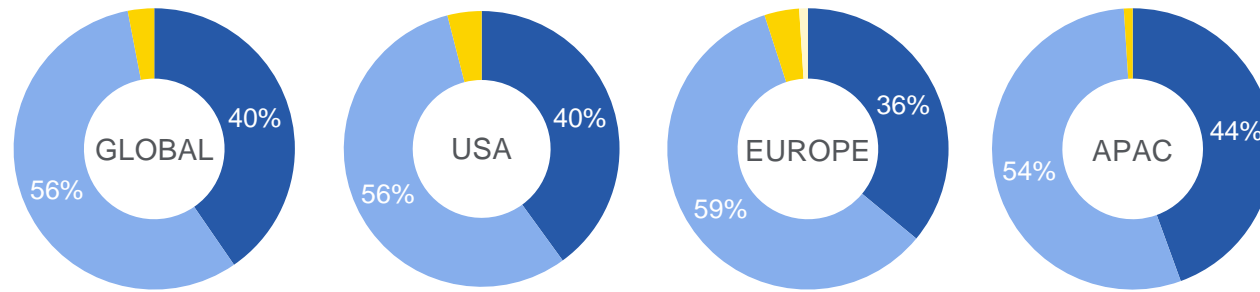


Preference for English over local language strongest among physicians in Italy, Poland and China

- I prefer to read in English
- I do not have a preference
- I prefer to read in my local language

# Medical journal articles influence physicians' professional habits

Articles read in medical journals have clear influence on physicians' practice and prescribing habits.



## 1 out of 2

physicians in India, Poland and China report medical journal articles to have a lot of influence

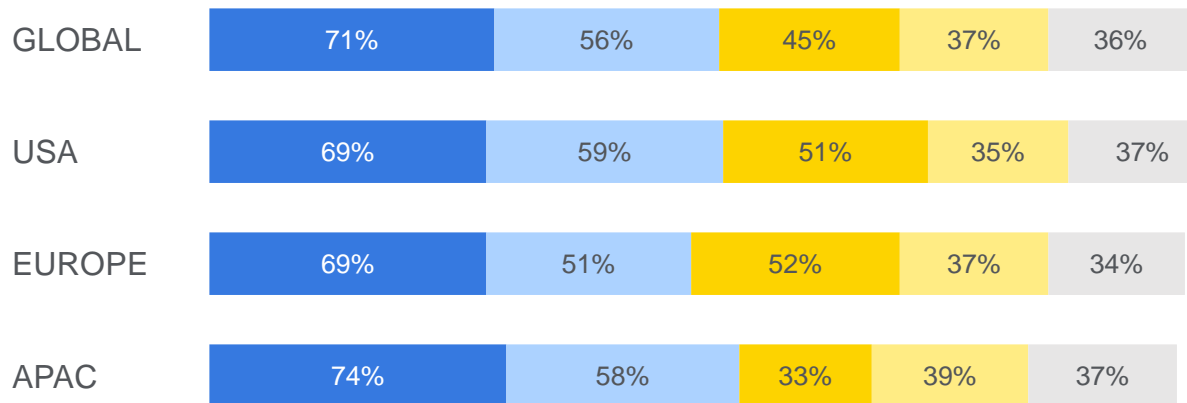
- A lot of influence
- Some influence
- Hardly any influence
- No influence
- Don't know



Source: Q07 – To what extent do the articles you read in medical journals influence your practice and prescribing habits?  
Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)

# Forms of online journal content or media accessed

Physicians in all markets access **journal websites** more than any other type of online journal content, followed by weekly email alerts and society websites.



- Journal websites
- Emailed weekly journal alerts – new content
- Society websites
- Journal eTable of Contents via email
- Hospital intranet/website

7 out of 10

physicians in all markets  
access journal websites

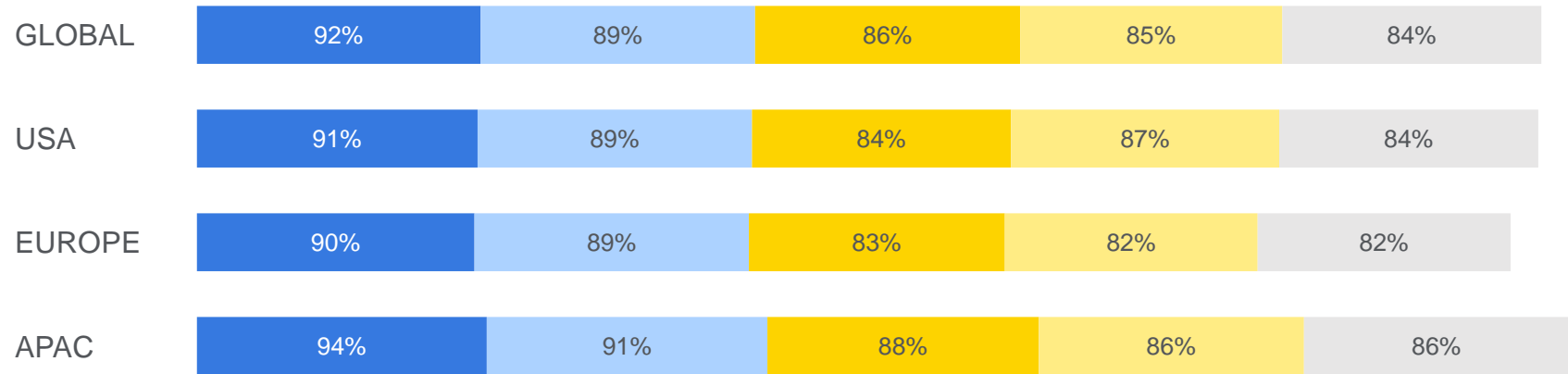


Source: Q08 – Which forms of online journal content/media do you access?

Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)

# The importance of resources for medical practice and prescribing

The top resources in terms of **medical practice and prescribing** are journal websites, society websites, journal app and emailed weekly journal alerts (new content).



- Journal websites
- Society websites
- Journal app
- Emailed weekly journal alerts (new content)
- Hospital intranet/website

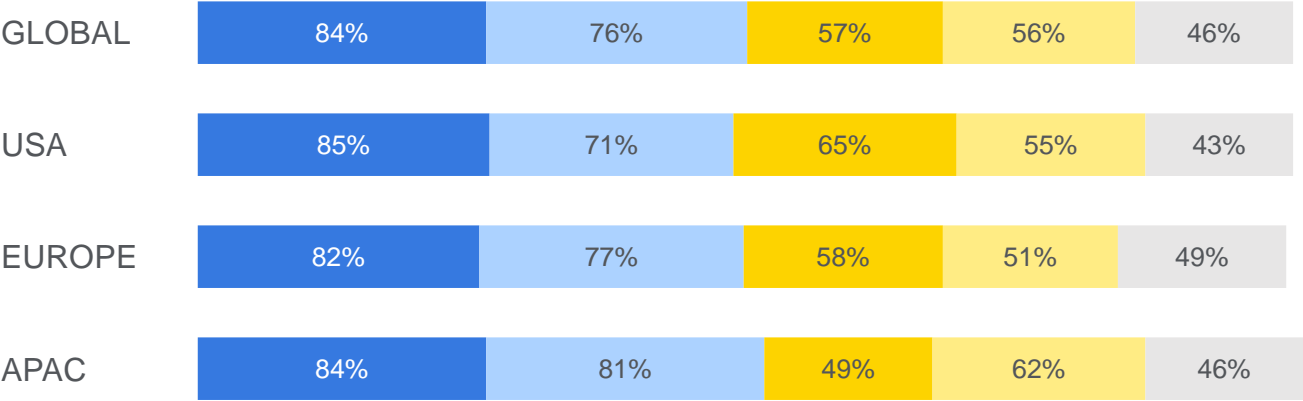
\*Low base size (<25)



Source: Q10 – And how important do you consider each of the following resources in terms of medical practice and prescribing?  
(5 point scale from not at all important to extremely important)  
Base: physicians accessing each form of online journal content/media (see notes)

# The resources physicians use to discover information about new products

Physicians usually find out about **new developments in their field** through medical journals and conferences.



- Medical journals
- Conferences/symposia
- Colleagues
- Medical news and information websites
- Medical society websites

**21%**  
physicians get new  
information from advertising

**20%+**  
from advertising (print and  
online) in: Spain, UK, USA,  
ANZ, India, Germany



Source: Q11 – How do you discover information about new products/developments in your field?  
Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)



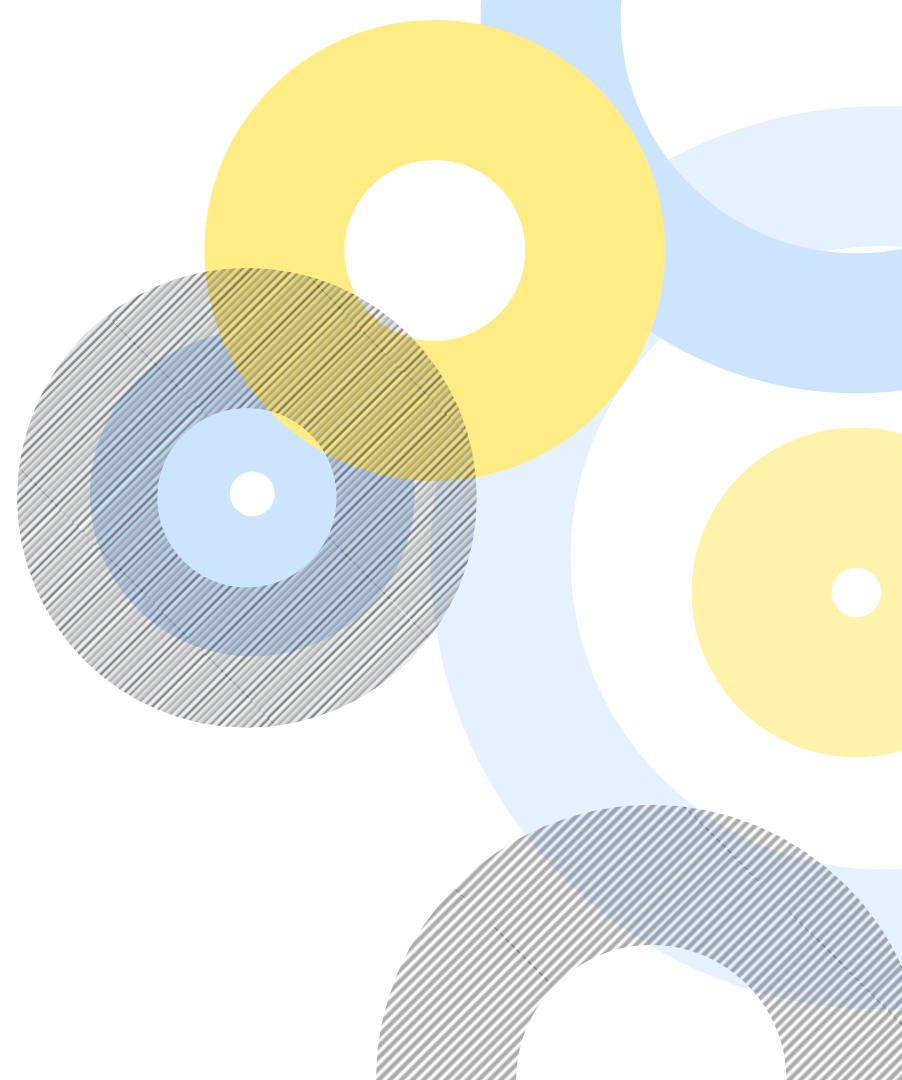
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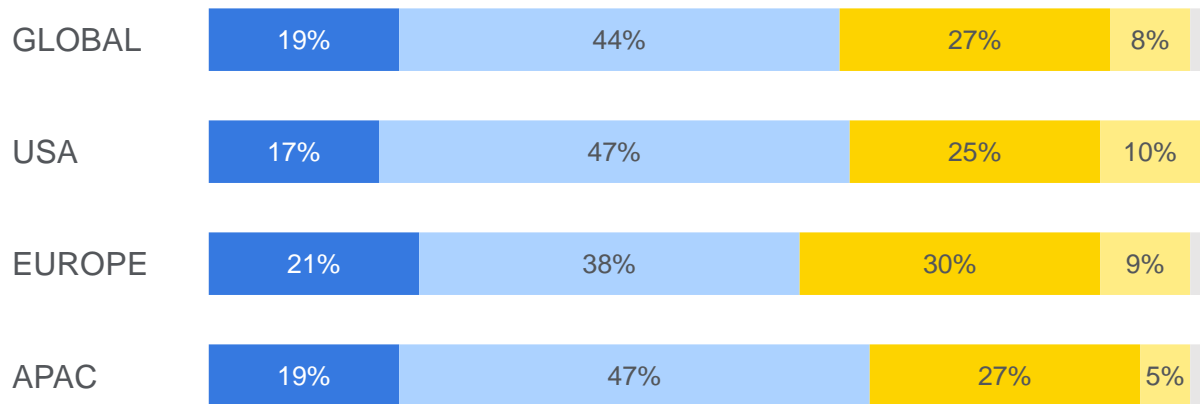
Publications

**Advertising**



# Frequency of noticing advertising in print medical journals

A majority of physicians notice advertising in printed medical journals.



■ Always  
■ Sometimes  
■ Rarely  
■ Never  
■ Don't Know

63%

physicians globally  
acknowledge noticing  
adverts in print  
medical journals

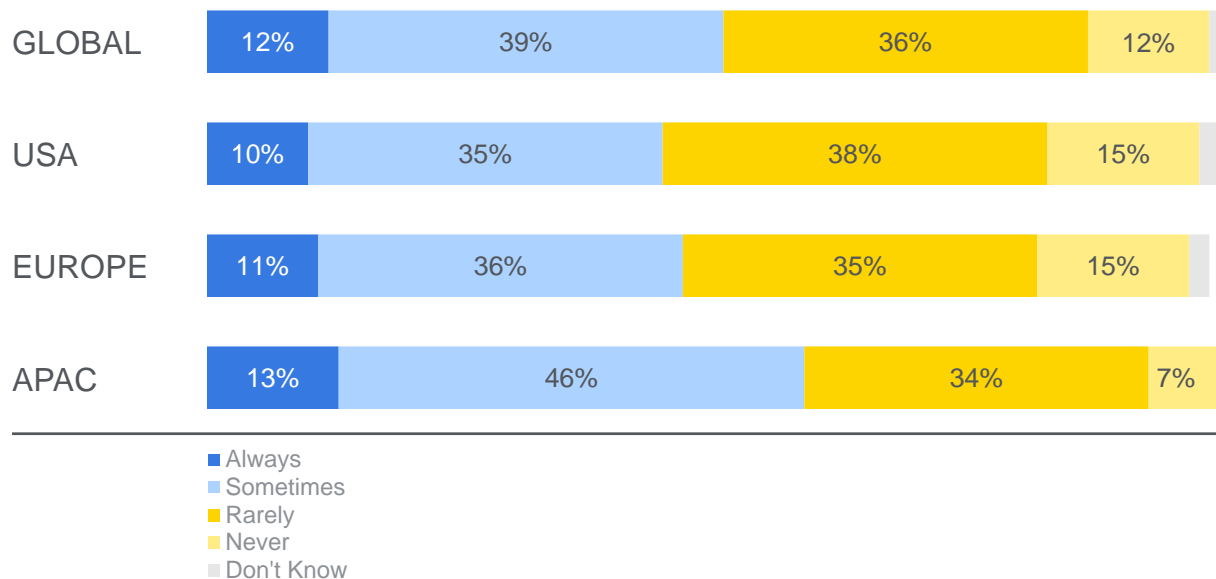


Source: Q12 – How often do you notice the advertising in print medical journals?

Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)

# Physicians also consistently notice ads in other online platforms

Globally, the majority of physicians notice advertising in online medical journals.



**65%+**

of physicians in India and China are more likely to notice all forms of digital advertising



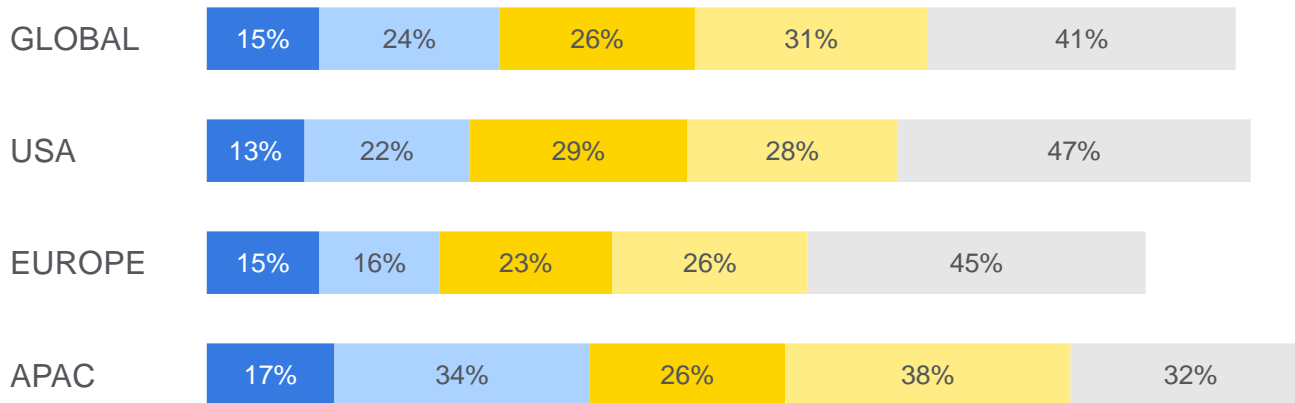
Source: Q13 – How often do you notice the advertising in online medical journals?

Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)



# Impact or action taken after seeing advertising in the past month

When action was taken, it tended to be learning something new about the product or researching it further.

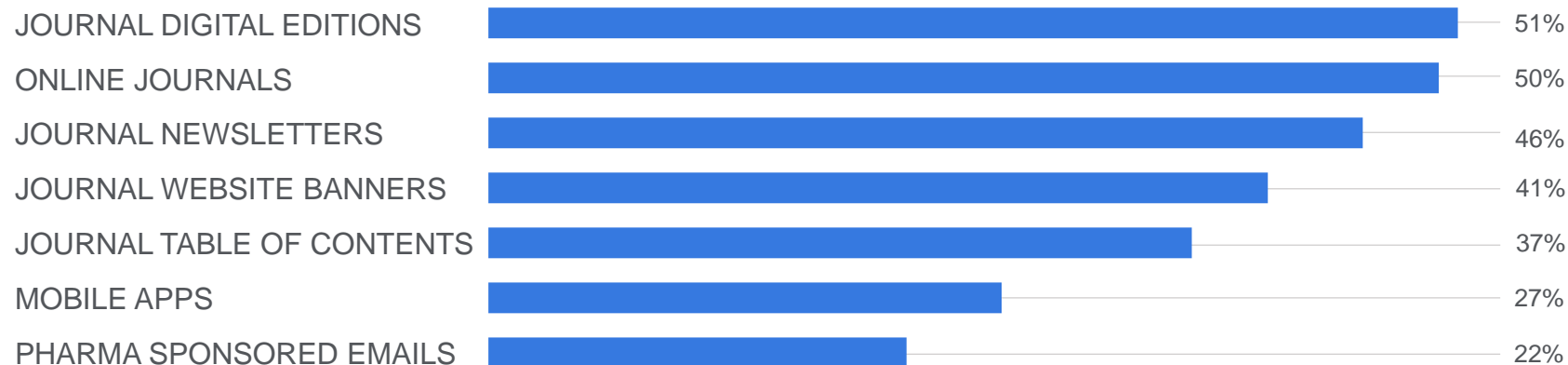


~60%

of physicians take action after seeing an ad in the past month

- Went to advertised brand's website
- Discussed the product with colleagues
- Researched the product on another website or offline
- Learnt something new (or recalled facts) about the advertised product
- No action

# Frequency of noticing advertising in online platforms

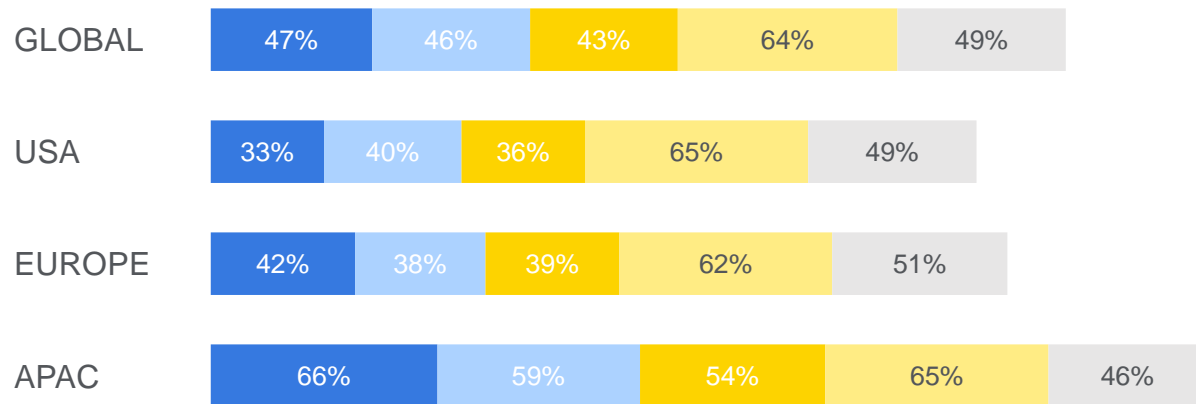


Source: Q13 – How often do you notice the advertising in online medical journals?

Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)

# Agreement with statements about medical journal advertising

64% of physicians agree that advertising is necessary to access free content. Generally, physicians' attitudes towards advertising are positive.



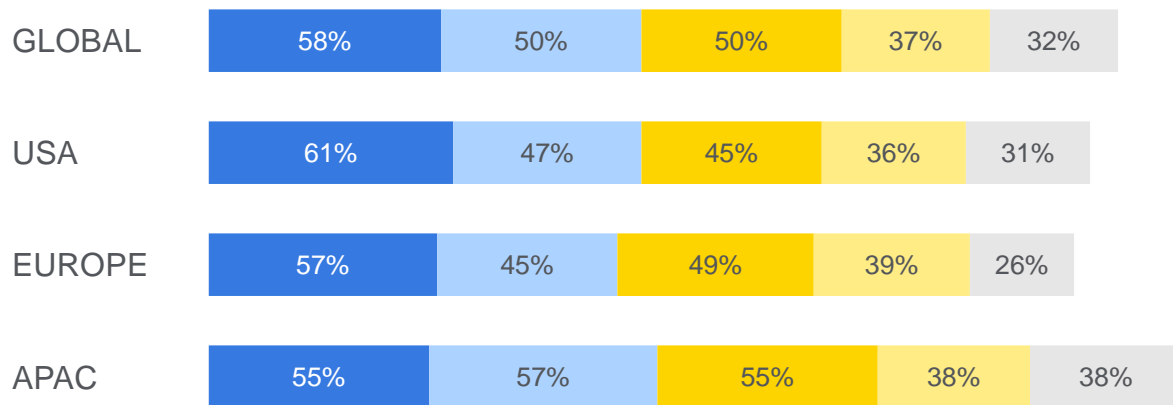
- Adverts are useful; a source of information about surgical equipment/medical devices
- Adverts are useful; I read/watch/notice those that apply to my practice
- Adverts are useful; I typically only pay attention to ones for new products
- Advertising is a necessary compromise, it allows access to free content
- Adverts neither bother me, nor do I pay much attention to them

## 47%

of physicians globally see adverts as a useful source of information about surgical equipment or medical devices (76% in India & 77% in China)

# Reasons to notice advertising when reading medical journals online

Advertising is more likely to be noticed when it contains relevant information, has a clear message or when it links to scientific articles/content

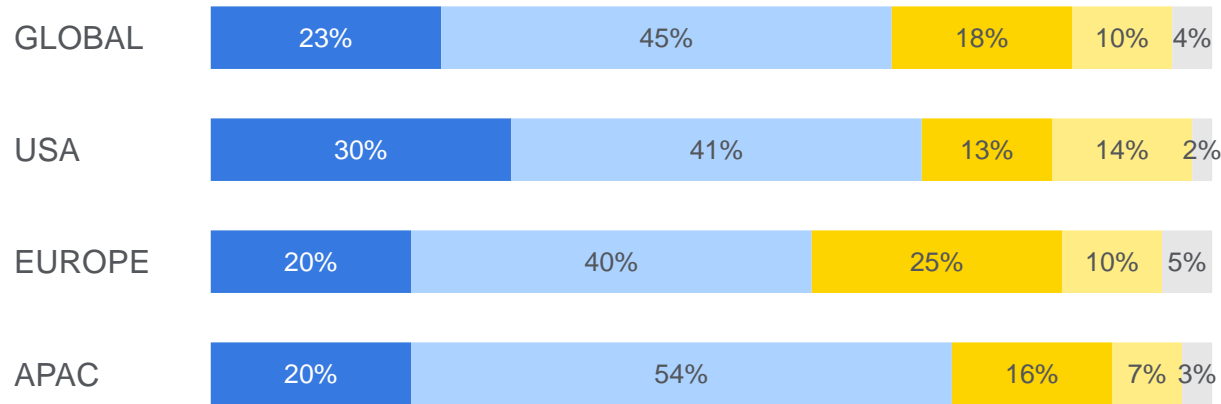


In APAC, Spain, Italy and Poland advertising is more likely to grab a physician's attention if it links to scientific articles or content

- When it contains relevant information
- When it has a clear message
- When it links to scientific article/content
- When it is from a non-commercial source
- When it has simple design, not too busy/flashy

# Influence of the source credibility on advertising being noticed or action taken as a result of seeing an ad

68% of physicians are more likely to notice and/or take action on ads if the source is credible.



■ A lot of influence  
■ Some influence  
■ Hardly any influence  
■ No influence  
■ Don't know

Physicians in the USA, ANZ, India and China notice advertising more when the source is credible.

In Europe physicians are influenced heavily by source credibility in Poland, Spain, UK, and Germany.

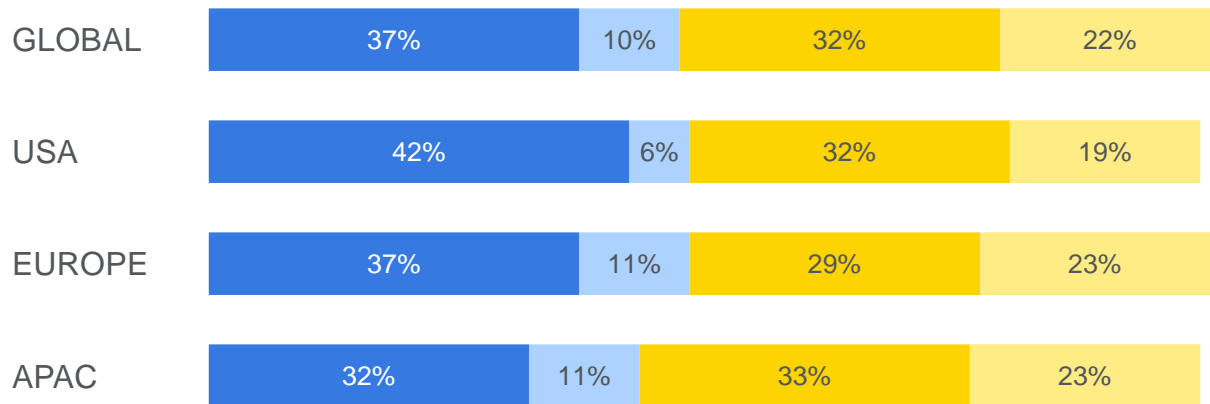


Source: Q19 – To what extent does the credibility of the source of medical information that you are reading or using influence your likelihood to notice and/or take action as a result of seeing an advertisement?

Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)

# Usage of ad blocking software

Ad blocking software usage varies slightly between markets.



- Using ad block
- Not using ad block, but plan to
- Not using ad block, and don't plan to
- Not familiar with ad block

Ad blocking software usage

**+50%**

physicians in Germany and Poland are currently using them

**~23%**

physicians in UK and India are currently using them



Source: Q20 –Do you currently use any ad blocking software on a computer, smartphone or tablet?  
Base: all physicians (Global: 1814; USA: 324; Europe: 1105, UK: 119, France: 248, Germany: 226, Spain: 206, Italy: 229, Poland: 77; APAC: 385, Australia and New Zealand: 91, India: 241, China: 53)