

THE ROLE OF SOCIAL MEDIA IN HEALTHCARE DECISIONS

A REPORT FROM **WEGO**HEALTH AND THE **DHC**





Welcome

The Digital Health Coalition is a 501(c)(3) nonprofit created to serve as the collective voice and industry rallying point for the discussion of the current and future issues relevant to digital marketing of healthcare products and services. We engage multiple & diverse stakeholders through research, events, and advocacy projects and then recommend actions that will drive innovation.

WEGO Health is a network of more than 100,000 Patient Leaders across virtually every health condition. We help the world's leading life sciences companies conceptualize, create, and execute patient influencer marketing campaigns that drive action while fostering trust. We combine the science of influencer marketing with the power of patient-driven content to deliver engagement across patient communities at scale.

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Introduction



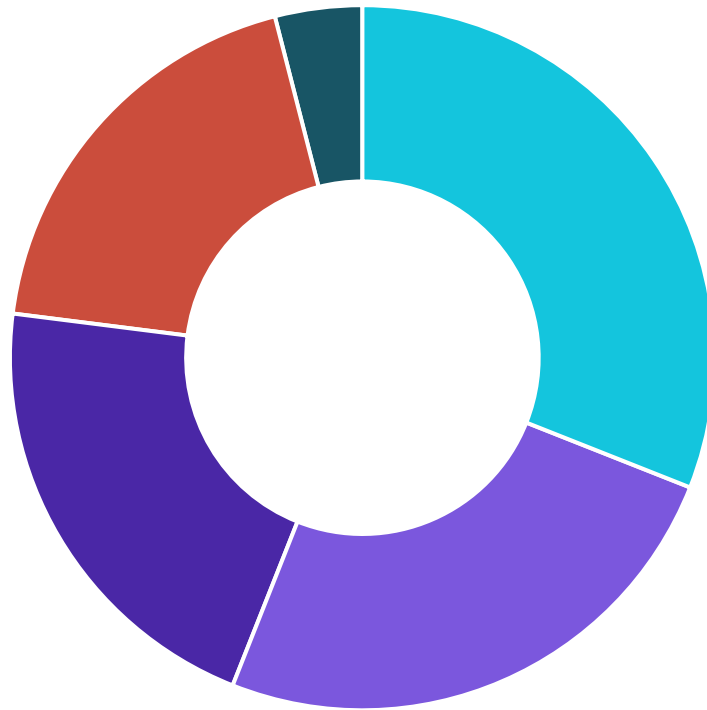
Social media is an ever-changing landscape, and sometimes it seems as if a new channel pops onto the scene every day. Pharma marketers face the challenge of reaching new audiences by uncovering which channels will produce the greatest return — all while navigating the regulatory landscape.

WEGO Health & the Digital Health Coalition surveyed 250+ patient leader network members across 125+ conditions to provide pharma marketers with a guide on the role of social media in today's patients' lives. Which channels are driving health action, which are most trusted, and what type of content do patients most want to see from pharma on social media?

The following data dives deep into the nuances between influencers across common tiers and non-influencers within the patient influencer space. We encourage marketers to consider these findings when vetting social media channels and creating social media content for their DTC marketing initiatives.

Survey Respondents

Survey Respondents Span a Range of Influence



- Non-Influencers
- Rising Influencers (>1,000 Followers)
- Nano-Influencers (1K - 5K Followers)
- Micro Influencers (5K - 49K Followers)
- Macro Influencers (50K+ Followers)

The primary survey goal was to understand the role of social media as it relates to healthcare decisions, but a secondary survey goal was to understand the variations between non-influencers and patient influencers.

The non-influencers in this survey are WEGO Health members who are activated patients deeply engaged in their healthcare journey but do not publicly share their stories. A patient influencer is someone who shares their story publicly.

The survey includes five respondent segments: non-influencers and four influencer segments defined by follower count. Most respondents have less than 50,000 followers, which is common in serious illness communities.

It's important to note that not all patients who share their story consider themselves influencers. The "rising influencer" segment accounts for those patients who share their story but have not yet grown a substantial following.

**** Note:** Look for *dark purple boxes* for callouts on variants between influencer segments.

Respondent Condition Overview

- Top Condition Categories:**
- 1. Chronic Illness
 - 2. Autoimmune
 - 3. Rare Diseases
 - 4. Pain
 - 5. Mental Health



- Top Specific Conditions:**
- 1. Fibromyalgia
 - 2. Anxiety
 - 3. Depression
 - 4. Migraine
 - 5. Multiple Sclerosis



Respondents provided up to three top conditions they discuss regularly from a list of over 125 specific conditions and therapy areas.

The most common condition categories selected were chronic illness, autoimmune, rare diseases, pain, and mental health. The most common conditions selected were fibromyalgia, anxiety, depression, migraine, and multiple sclerosis.

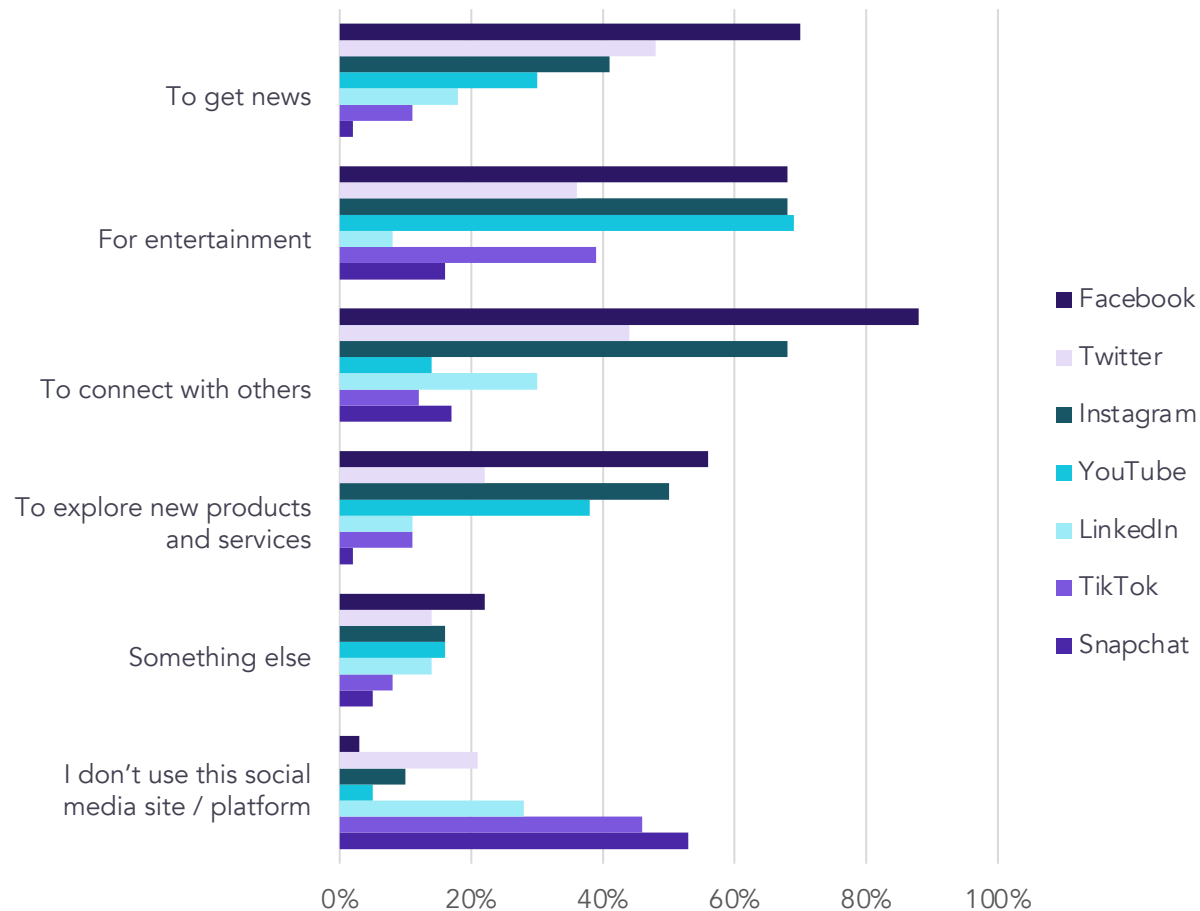
Because respondents were able to choose up to three conditions for their top conditions discussed, we found that the average respondent selected 2.1 conditions each.

This speaks to the fact that patient influencers frequently advocate on more than one condition or category because many live with more than one chronic condition. Similarly, it is common to see audience crossover between conditions, especially those which are related (i.e., depression and anxiety).

Q11: Which health conditions do you discuss regularly using social media sites? (Please select up to 3 conditions which you discuss weekly or more)

Social Channels of Today

Connection is King and Facebook Dominates



Nearly all influencers and non-influencers use Facebook, YouTube and Instagram in some way, although the way they use the platforms varies. This is not specific to health information but a summary of overall utilization.

Facebook is used most often, although Instagram and YouTube are also top resources for entertainment and learning about new products and services.

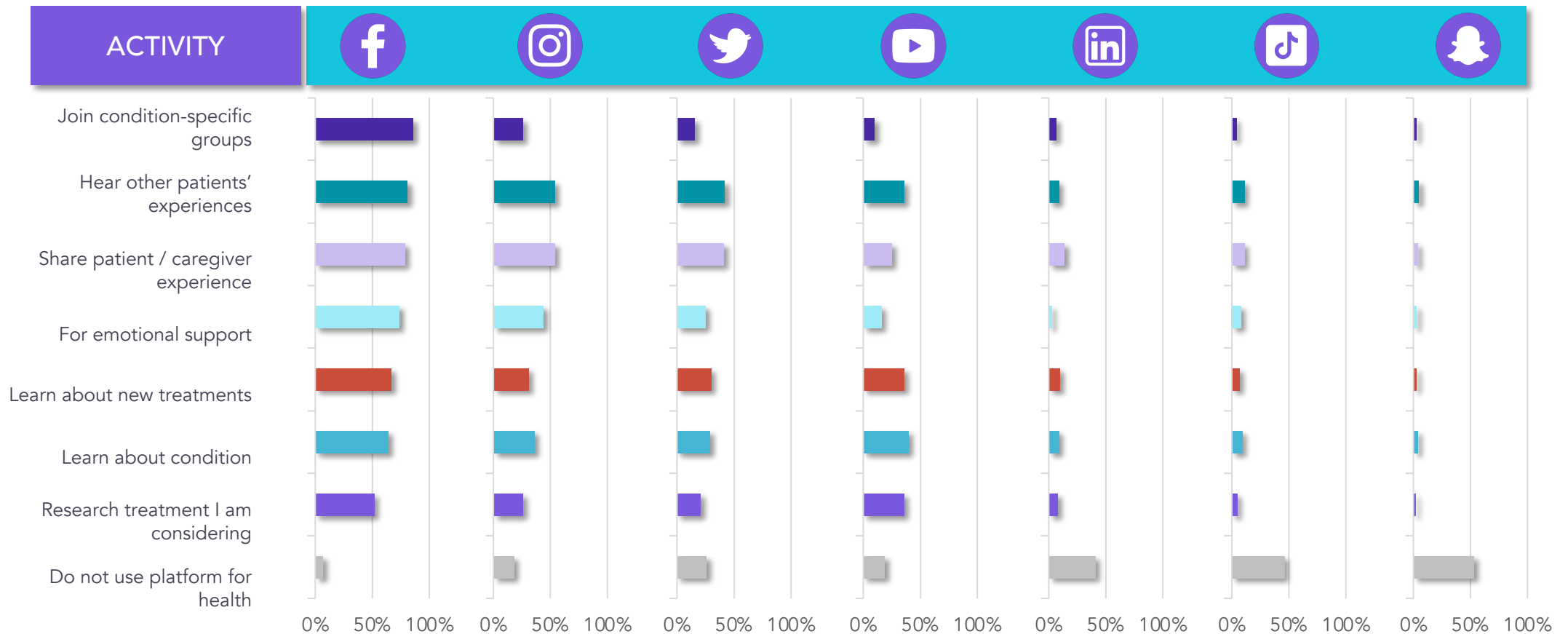
Impact by influencer type

- Influencers are more likely than others to use Twitter for news and LinkedIn to connect with others, and less likely to use Instagram for entertainment.
- Micro influencers are more likely than others to use Facebook for news and rising influencers are more likely to use Facebook for entertainment.

Q1: Please select the social media platforms you or members of your condition community use for the following activities.

Facebook #1 in Health-Related Information and Decision-Making








The following is a breakdown of social activity by social channel. As it relates to health activities, patient use Facebook most for all the listed categories.



Q2: Now thinking specifically about health-related information and decision-making, please select the social media platforms you or members of your condition community use for the following activities.

Greater Followers Correlate with Higher Platform Utilization



As influencer status rises, so does the likelihood to utilize social media and test new channels:

INFLUENCER TIER	% Using Social Media Platform for Health-Related Information & Decision-Making						
							
Non-Influencer (No Followers)	83%	69%	61%	74%	56%	54%	52%
Rising Influencer (Under 1,000 Followers)	95%	80%	66%	72%	52%	45%	43%
Nano Influencer (1,000-4,999 Followers)	96%	86%	76%	86%	61%	54%	45%
Micro Influencer (5,000-49,999 Followers)	92%	90%	90%	90%	65%	65%	46%
Macro Influencer (50,000+ Followers)	100%	91%	91%	91%	82%	73%	73%

Q2: Now thinking specifically about health-related information and decision-making, please select the social media platforms you or members of your condition community use for the following activities.

Micro Influencers Embrace Video to Share and Connect with Others

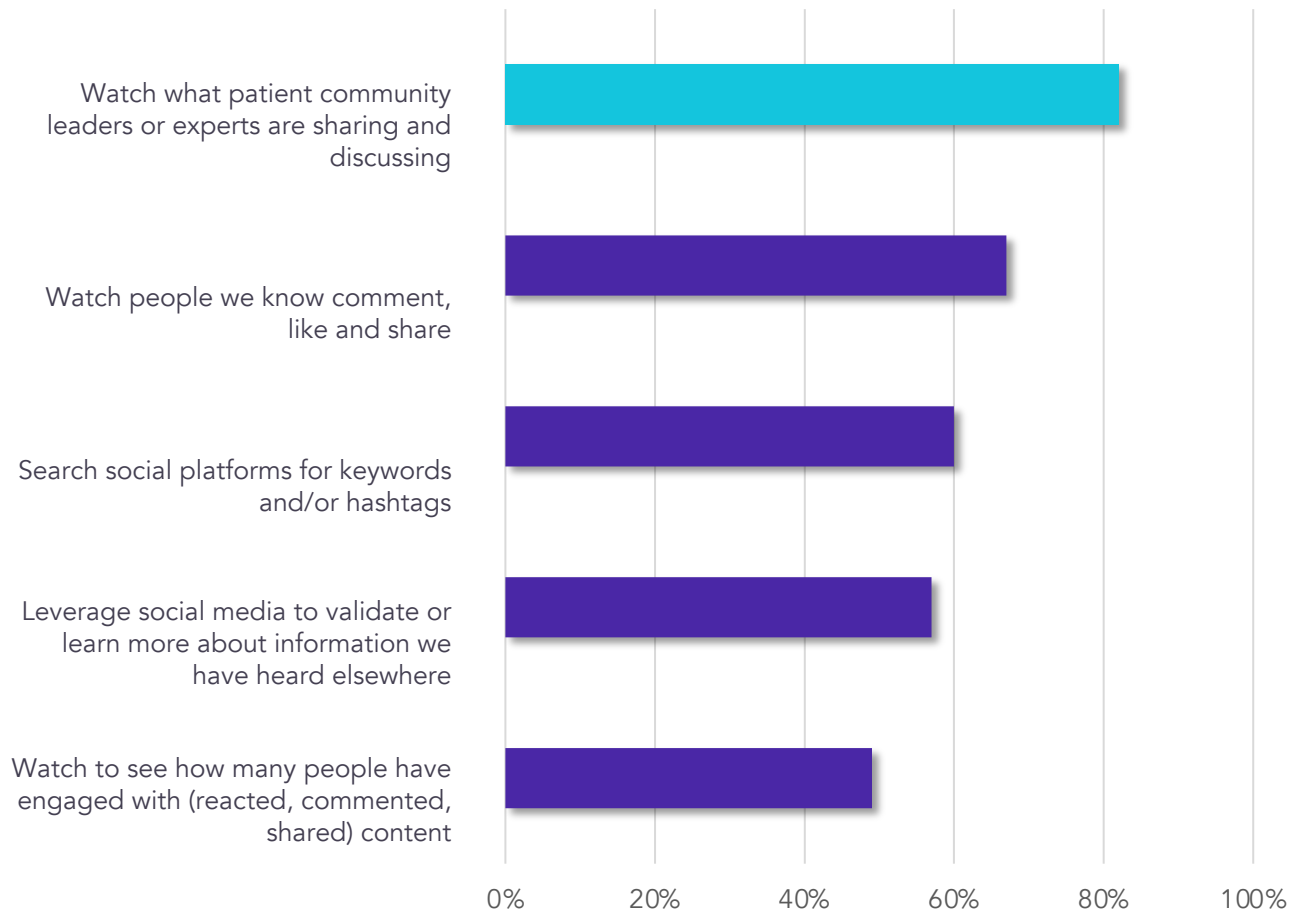
Micro Influencers outpace other influencer types in their use of TikTok and YouTube – both video-oriented media – for multiple health-related activities:

	Among Micro Influencers...	Compared to the total...
	<ul style="list-style-type: none"> 29% use to share their patient or caregiver experiences 27% use to hear from other patients about their experiences 21% use to learn about a condition 17% use for emotional support 	<ul style="list-style-type: none"> 11% use to share their patient or caregiver experiences 11% use to hear from other patients about their experiences 9% use to learn about a condition 8% use for emotional support
	<ul style="list-style-type: none"> 48% use to share their patient or caregiver experiences 48% use to hear from other patients about their experiences 46% use to research treatments they are considering 29% use for emotional support 	<ul style="list-style-type: none"> 25% use to share their patient or caregiver experiences 36% use to hear from other patients about their experiences 36% use to research treatments they are considering 16% use for emotional support

Q2: Now thinking specifically about health-related information and decision-making, please select the social media platforms you or members of your condition community use for the following activities.

The Role of Social in Healthcare Decisions

Patients Navigate by Watching Patient Community Leaders and Experts



Over 80% of respondents say they and members of their communities use social media to watch what patient community leaders and experts in their condition category share and discuss online.

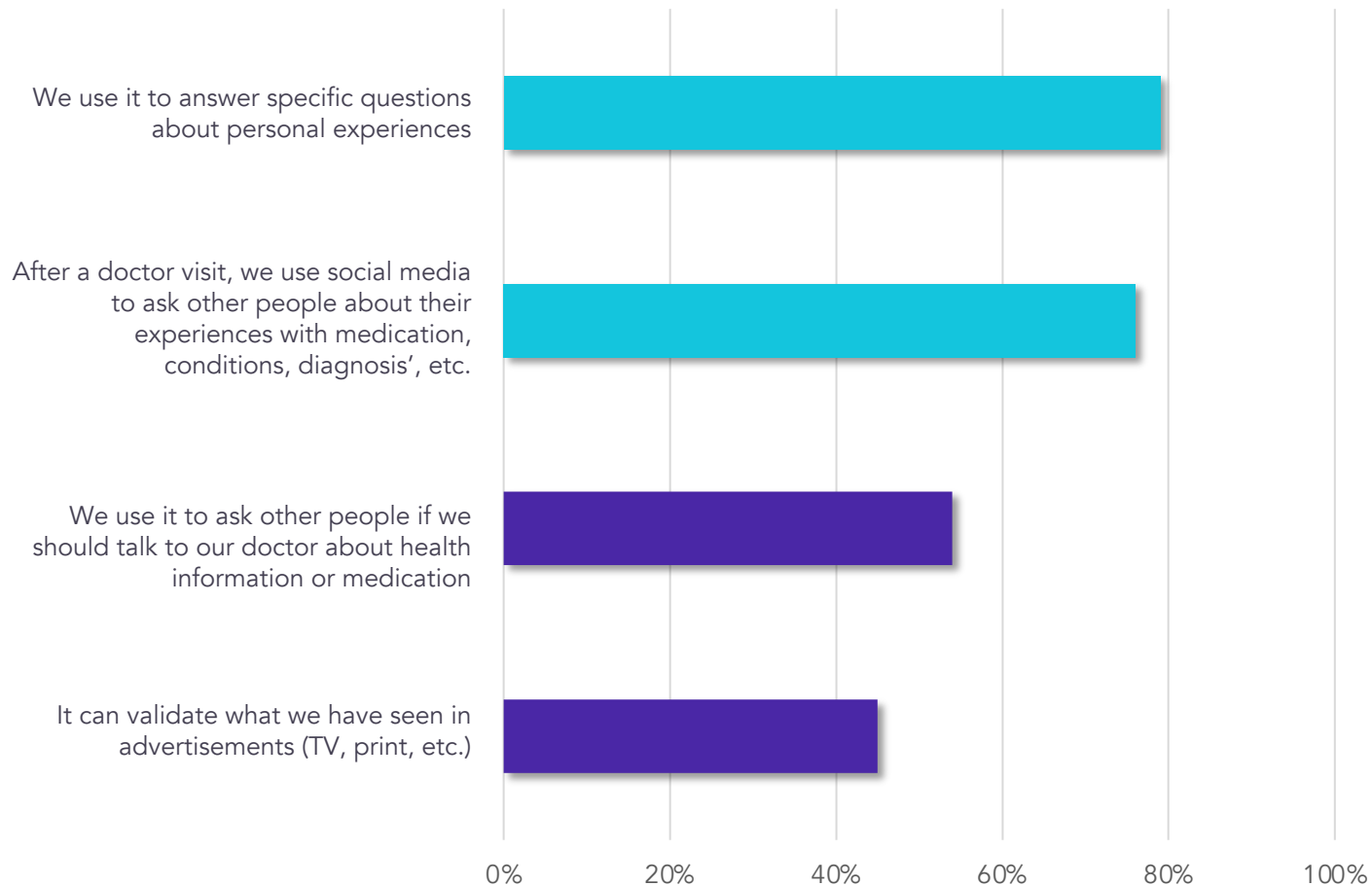
Three-quarters say they keep an eye on what people they know comment on, like and share.

Impact of influencer type

- Non-influencers are somewhat less likely to engage and rely on social media as a resource overall.
- Compared to all groups in total, they are somewhat less likely to watch community and patient leaders, search for keywords and hashtags and leverage social media to validate or learn more about information they heard elsewhere.

Q3: When using social media platforms, how do you and the members of your condition community navigate health condition information to find what you feel will be helpful? (Please select all that apply.)

Social Media Answers Questions about Patient Experiences



Over three-quarters of respondents say they use social media to answer specific questions about personal health experiences and to ask other people about their experiences with conditions, diagnoses, medications and other health-related topics.

Just over half say they ask others for input regarding whether they should talk to their doctors about specific medications or health topics and just under half rely on social media to validate what they see in ads.

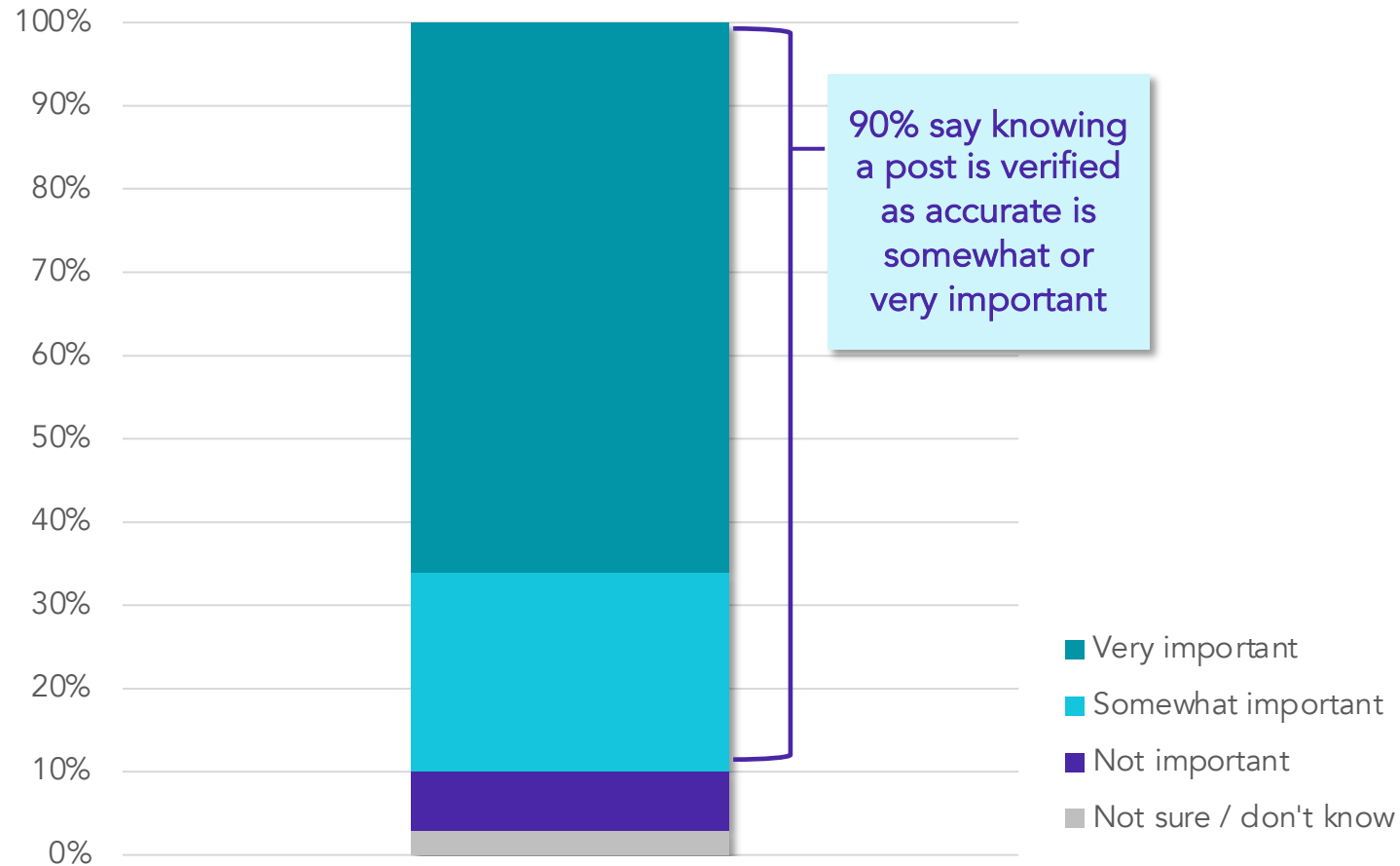
Impact of influencer type

- Non-influencers are less likely to rely on social media to answer questions about personal experiences, ask follow-up questions after doctor's visits and ask if they should talk with their doctor about health topics.
- However, all groups are equally likely to look to social media to validate advertising.

Q4: What role does social media play in researching a medication or health information that you or members of your condition community have heard about? (Please select all that apply.)

Trust in Social in Healthcare

Verification of Accuracy is Highly Important



Nearly all respondents agree that knowing a post is verified as accurate is at least somewhat important.

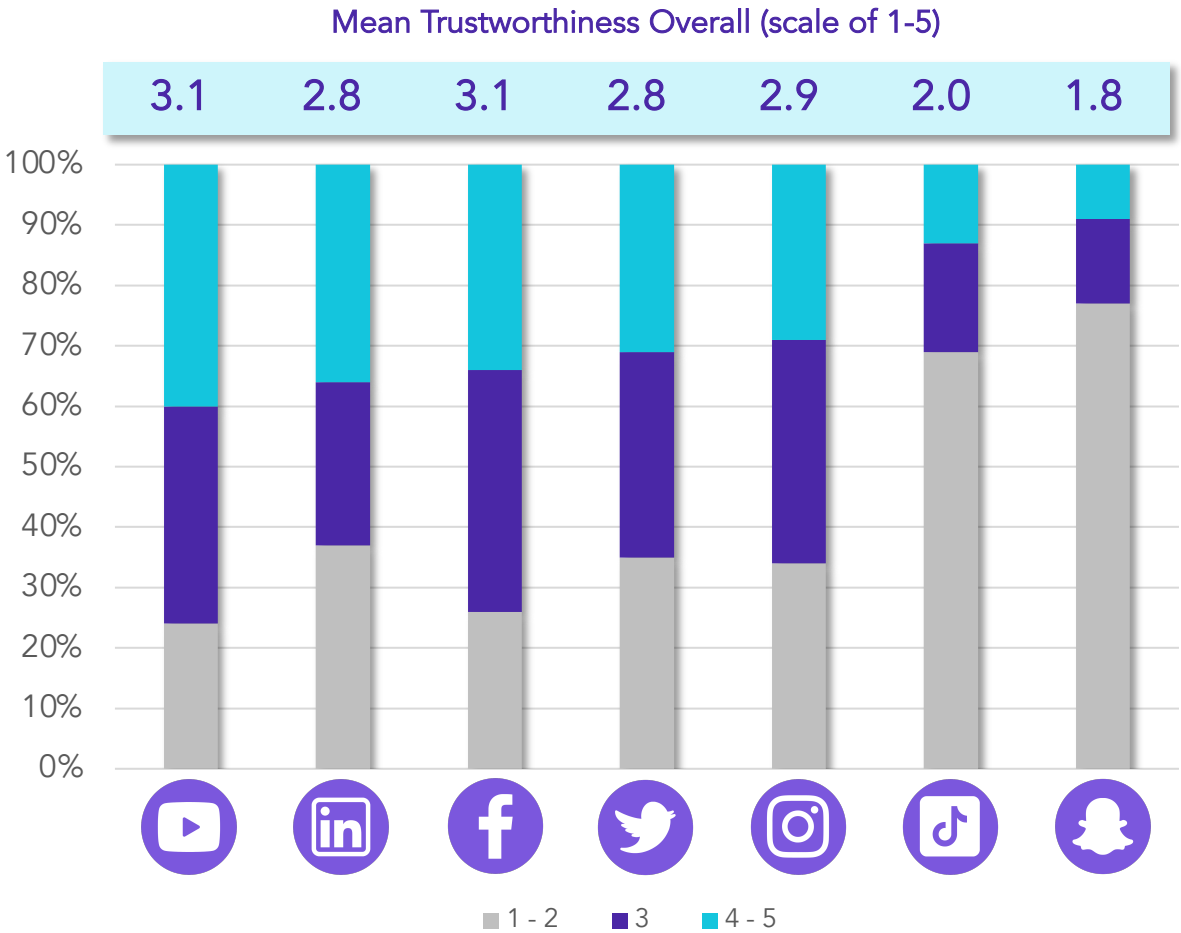
About three-quarters say it is very important and less than 10% say it is not important.

Impact of influencer type

- Macro Influencers consider verification less important.
- Over one-quarter of macro influencers say verification is not important vs. 7% of the total.

Q5: In your opinion and on behalf of members of your condition community, how important would it be for a social media site/platform to let you know whether or not a health data-related post is "verified" as accurate information?

Most Platforms are Trusted, TikTok and Snapchat Less Trusted



On a scale of 1-5, 5 being the highest, respondents rate YouTube, LinkedIn, Facebook, Twitter and Instagram above average in terms of trustworthiness.

YouTube and Facebook are perceived as most trustworthy overall, with an average score of 3.1. TikTok and Snapchat are least trustworthy with an average score of 2.0 and 1.8.

YouTube earned the most top scores (4-5), while TikTok and Snapchat received the most bottom scores (1-2).

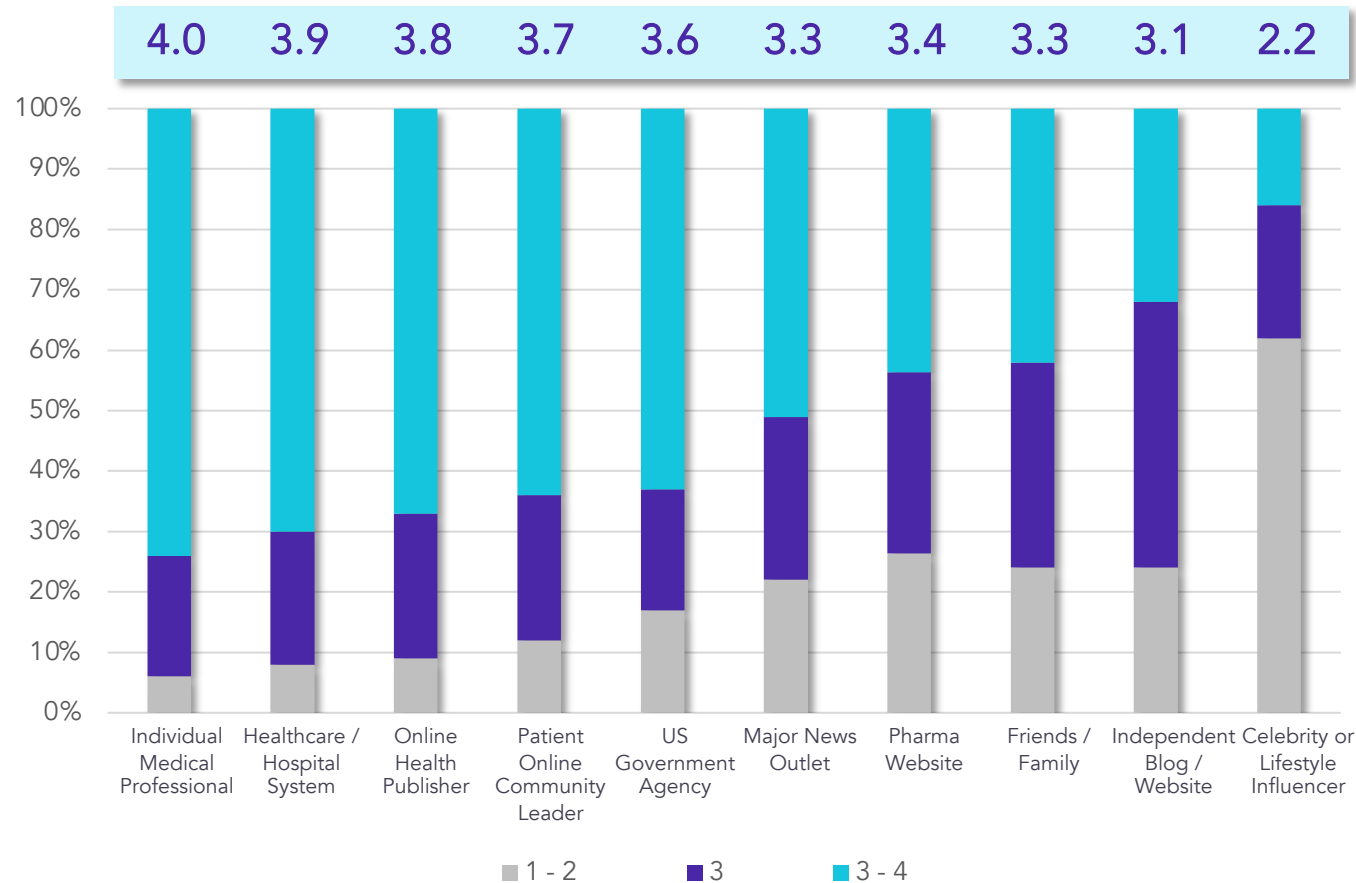
Impact of influencer type

- More engagement is associated with higher levels of trust: non-influencers perceive all platforms as less trustworthy than influencers do.
- The difference between non-Influencers and influencers is especially notable with respect to Facebook, YouTube, and Instagram.

Q6: Using a scale from 1 to 5, where 1 is not trustworthy and 5 is very trustworthy, how would you and members of your condition community currently rate the trustworthiness of health-related information on each of the following platforms on social media? (Please rate each of the following).

Medical Professionals, Healthcare Systems, and Patient Leaders Most Trusted

Mean Trustworthiness of Health-Related Information (scale of 1-5)



Individual medical professionals, healthcare/hospital systems, online health providers and patient online community leaders are perceived as the most trustworthy sources of health-related information.

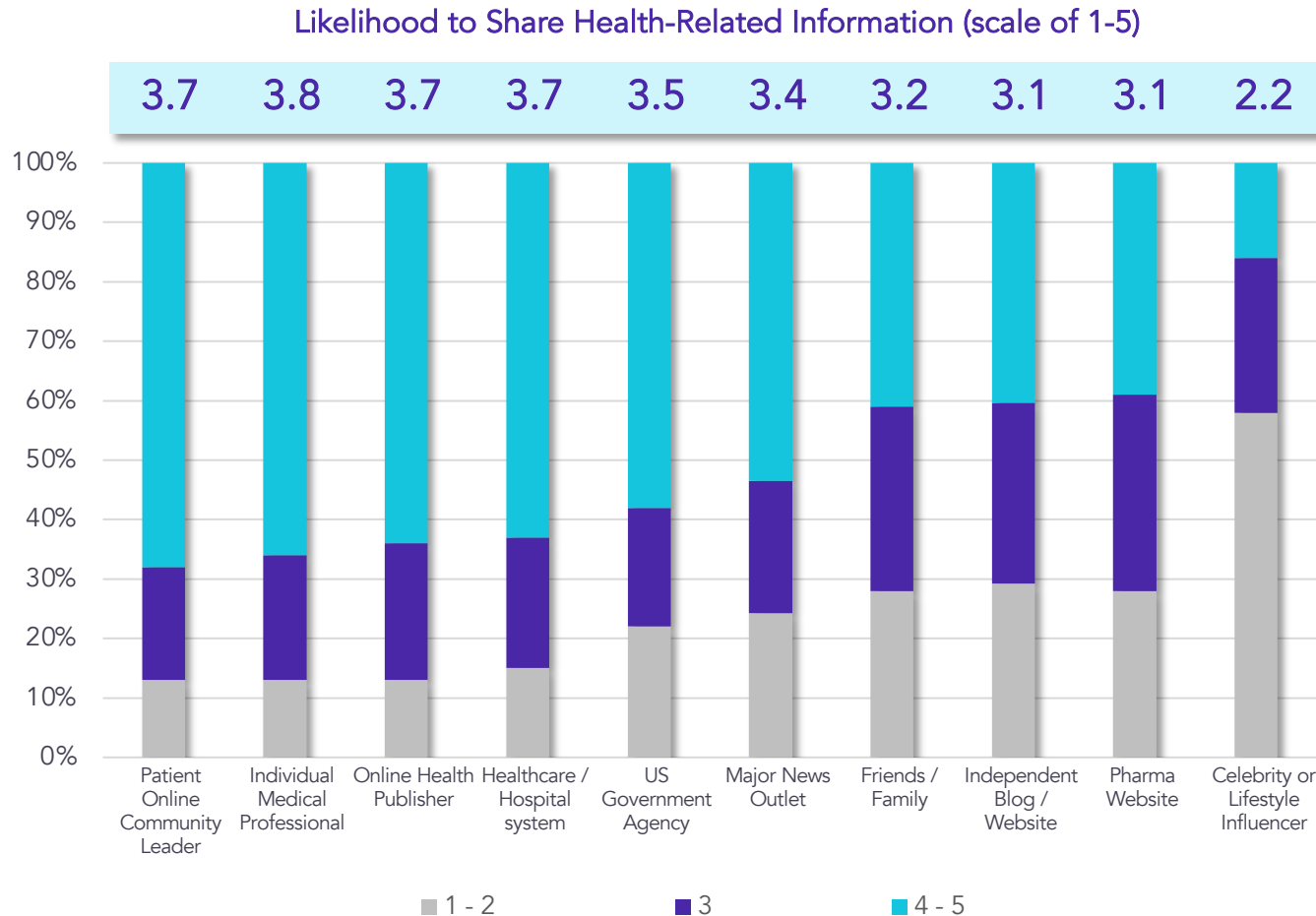
Celebrity/lifestyle influencers are by far the least trusted.

Impact of influencer type

- Non-influencers are *less likely than others* to trust multiple sources, including independent blogs/websites, individual medical professionals, patient online community leaders, online health publishers, and celebrity/lifestyle influencers.
- Macro influencers are *more likely* to trust several sources: online health publishers, independent blogs/websites, the US government, healthcare/hospital systems, and patient online community leaders.

Q7: Using a scale from 1 to 5, where 1 is not at all trustworthy and 5 is very trustworthy, how would you and members of your condition community currently rate the trustworthiness of health-related information shared by each of the following on social media? (Please rate each of the following).

Information Posted by Patient Leaders and Medical Professionals Most Shared



Respondents are most likely to share information from patient online community leaders and individual medical professionals; about three-quarters rate their likelihood to share from those sources a 4 or 5 on a scale of 1-5.

They are least likely to share information from celebrity/lifestyle influencers.

Impact of influencer type

- Across all sources, non-influencers rate their likelihood to share lower than others while macro influencers rate their likelihood to share higher.
- The biggest gaps between non-influencer and total likelihood to share are for independent blogs/websites, patient online community leaders, and individual medical professionals.

Q8: Using a scale from 1 to 5, where 1 is not at all likely and 5 is very likely, how likely are you and members of your condition community to share health-related information from each of the following sources on social media? (Please rate each of the following).

Pharma Content on Social

Patients Seek Stories & Access / Support Information From Pharma

Interest Level in Pharma Content on Social Media (scale of 1-5)



Respondents are most interested in seeing stories and experiences from patient community leaders (average 4.0) and other patients and reading information about access and patient support programs (average 4.0); over three-quarters rate each high in terms of valuable information.

Celebrity/lifestyle influencer stories are least valued overall with an average score of 2.3 across all respondents.

Impact of influencer type

- Non-influencers rated all categories somewhat lower, except "debunking myths", which was consistent with other types of influencers.
- Conversely, macro influencers rated all categories somewhat higher, except "sponsored physician/nurse advice", which was consistent with other types of influencers.

Q9: Using a scale from 1 to 5, where 1 is not at all interested and 5 is very interested, specific to the content shared by pharmaceutical brands/manufacturers, what are you and members of your condition community most interested in seeing on your social media feeds? (Please rate each of the following).

Key Takeaways

1 Social media platforms are vital resources for patients seeking information and support with health-related decisions. Most respondents use at least one platform for health-related information and decision-making support; Facebook is the most-used platform.

2 Patients look to social media for stories, expert insights, and answers. Over 80% say they watch what patient online community leaders share and discuss. 74% say hearing about those leaders' experiences is of high interest and 73% say access and patient support information is interesting. 79% look to social media to answer specific questions about their own personal experiences.

3 Trust is key. 90% say knowing a post is verified as accurate is somewhat or very important. YouTube, LinkedIn, Facebook, Twitter and Instagram are the most trusted platforms and patients most trust content coming from individual medical professionals, healthcare systems, online health providers and patient online community leaders.

4 Reliance on and trust in social media varies by influencer status. Non-influencers are less likely than influencers to consider social media platforms trustworthy. Macro influencers are most likely to rely on every platform for information, while micro influencers are more likely users of video-based platforms (YouTube and TikTok) than other influencer tiers.

Questions?

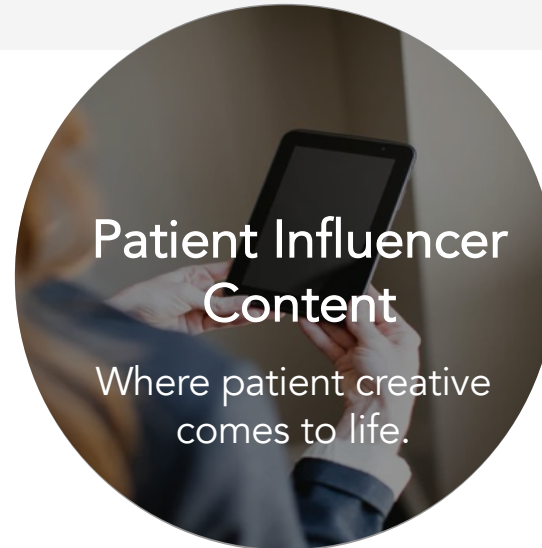
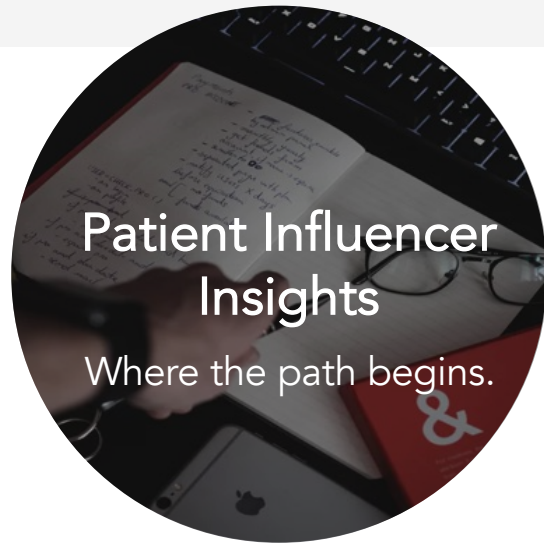


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WEGO Health: Patient Activation Powered by Patient Influencers



With a network of more than 100,000 patient influencers across virtually every health condition, WEGO Health helps the world's leading life sciences companies conceptualize, create, and execute influencer marketing campaigns that drive high-value actions and awareness of new therapies and treatments.

We combine the science of influencer marketing with the power of patient-driven content to deliver engagement across patient communities at scale.

Want to discover how? Visit wegohealth.com/for-companies to connect with a member of our team.

Appendix: Survey Questions

1. Please select the social media platforms you or members of your condition community use for the following activities:
2. Now thinking specifically about health-related information and decision-making, please select the social media platforms you or members of your condition community use for the following activities:
3. When using social media platforms, how do you and the members of your condition community navigate health condition information to find what you feel will be helpful? (Please select all that apply.)
4. What role does social media play in researching a medication or health information that you or members of your condition community have heard about? (Please select all that apply.)
5. In your opinion and on behalf of members of your condition community, how important would it be for a social media site/platform to let you know whether or not a health data-related post is "verified" as accurate information?
6. Using a scale from 1 to 5, where 1 is not trustworthy and 5 is very trustworthy, how would you and members of your condition community currently rate the trustworthiness of health-related information on each of the following platforms on social media? (Please rate each of the following)
7. Using a scale from 1 to 5, where 1 is not at all trustworthy and 5 is very trustworthy, how would you and members of your condition community currently rate the trustworthiness of health-related information shared by each of the following on social media? (Please rate each of the following)
8. Using a scale from 1 to 5, where 1 is not at all likely and 5 is very likely, how likely are you and members of your condition community to share health-related information from each of the following sources on social media? (Please rate each of the following)
9. Using a scale from 1 to 5, where 1 is not at all interested and 5 is very interested, specific to the content shared by pharmaceutical brands/manufacturers, what are you and members of your condition community most interested in seeing on your social media feeds? (Please rate each of the following)
10. Are you actively sharing your health story online?
11. Which health conditions do you discuss regularly using social media sites? (Please select up to 3 conditions which you discuss weekly or more)
12. Approximately how many followers do you collectively have on accounts where you share your health story?

