



Adapting to change in the healthcare digital ecosystem

iCrossing Pharma report 2023



iCrossing

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INTRODUCTION

Where people seek healthcare advice is changing. The traditional journey of feeling unwell, phoning the GP surgery, and making an appointment within a few days is now rarely taken. People are seeking alternate ways to find medical advice, using a variety of online sources.

There are many reasons for this. Things shifted very quickly in 2020 when it wasn't possible to see a GP face-to-face. The public was forced to find other ways to have health questions answered, and new habits were formed. Though it's now possible to see the doctor in person, it's still difficult to get an appointment¹. Media coverage depicting the NHS at 'breaking point' means that many people go online to find health diagnoses and remedies to avoid burdening the Health Service².

As well as this, trust in the NHS to deliver high quality healthcare has fallen over the last few years³. Public satisfaction is at a 25-year low. A growing number of people feel dismissed or not listened to by traditional Health Care Practitioners, particularly women⁴ and Generation Z⁵.

The NHS also has a communication problem. Generation Z's preferred method of communication is social media, yet the NHS primarily communicates via phone and post.

This doesn't mean the public doesn't love the NHS. Statistics show they still do; the public overwhelmingly supports the principles of the NHS and believes it should be free for those who need it⁶.

And when it comes to Google, the NHS still reigns supreme. iCrossing data found that nhs.uk continues to rank first in the UK for its category. It appears that the British public doesn't have confidence that the NHS will deliver quality healthcare at the point of service, but it does believe it knows what it's talking about.



There is space to be a trusted source of information in places the NHS doesn't reach, or where people are wary of traditional healthcare providers. Trust in forums and other sources of healthcare information is increasing. Self-diagnosis via social media is on the rise, particularly around mental health⁷.

There's increasing opportunity for pharmaceutical companies and other healthcare providers to be listened to when it comes to healthcare advice. Research shows that the public is becoming more trusting of pharmaceutical companies, private health providers and other non-NHS sources of information⁸.

In this report, iCrossing's digital experts offer their specialist knowledge on how pharma and other healthcare brands can fill the online information gaps where the NHS isn't visible. This report will also offer insights into how to keep ahead of trends to understand where your audience is looking for trustworthy information and how you can provide it to increase visibility and impact.

1. [GP Patient Survey 2022](#)
2. [Lenstore public health search habits study](#)
3. [Edelman Trust Barometer Special Report: Trust and Health](#)
4. [DHSC 'Women's Health - Let's talk about it' survey](#)
5. [LovedBy Gen Z healthcare survey](#)
6. [The Kings Fund BSA Survey 2021](#)
7. [Hunger: The dangers and benefits of self-diagnosing online](#)
8. [Edelman Trust Barometer Special Report: Trust and Health](#)

PART 1 : INSIGHT AND IMPACT

Insight

In 2020, there was an enormous amount of goodwill for the NHS. Polling by YouGov described a 'halo effect' where support for NHS staff led to higher reported levels of satisfaction with the service¹.

However, as time has gone on, waiting lists have grown longer and, despite the resumption of in-person appointments, it's become increasingly difficult to see a GP face-to-face. Though the public still supports the NHS, it seems its perception of it has changed and goodwill is starting to erode.

According to the 2022 Edelman Trust Barometer Special Report the UK is the worst performing Western country when it comes to perceived access to high quality healthcare. Of those surveyed, 60% said they lack access to high quality healthcare and 49% said that the pandemic has decreased their confidence that the healthcare system is well-equipped to handle major health crises².

This is backed up by an adult inpatient survey by the Kings Fund which found that public satisfaction with the NHS has fallen to a 25-year low³. Just 36% of people are content with the NHS. This is across all ages, income groups, sexes and supporters of different political parties.

Asked what the NHS should prioritise, the highest number said to make it easier to get a GP appointment, improve waiting times and increase the number of staff across the NHS. This seems to suggest that the public believes the NHS has a funding problem, not a knowledge and skills problem. Indeed, the Kings Fund report found that 8 in 10 of those surveyed said the NHS has a 'major' or 'severe' funding problem.

People still strongly support the principles of the NHS. 94% of respondents believe the NHS should be free of charge when needed, 86% believe it should be primarily funded through taxes and 84% believe that care should be available to everyone⁴.

The NHS is also a trusted source of information. iCrossing research found nhs.uk continues to rank first in its category when it comes to Google searches and 81% of people say they have trust and confidence in doctors, with 79% saying the same for nurses.

1. [The Kings Fund BSA Survey 2021](#)
2. [Edelman Trust Barometer Special Report: Trust and Health](#)
3. [The Kings Fund BSA Survey 2021](#)
4. [The Kings Fund BSA Survey 2021](#)

PART 1 : INSIGHT AND IMPACT

Rise in self diagnosis

More than half of the population Googles their symptoms to see if they need to see the GP¹. Self-diagnosis is on the increase, particularly for mental health challenges². People are looking for answers online, and search volumes paint a positive picture of the NHS as a first port of call for self-diagnosis.

Other information sources are increasing in popularity, including forums and social media. It seems people are turning to crowd sourced information – to hear from real people who have the same feelings and/or symptoms, perhaps to connect through shared experience. iCrossing keyword research has found a 32% increase in searches on health forums across a range of topics and ailments since 2019. ‘Mumsnet health’, for example, saw a 23% rise in search volume over a three-month period in late 2022.

Generation Z uses TikTok in large numbers to find information about mental health. Videos discussing the topic pick up millions of views, even if they aren’t created by a registered psychotherapist.

The hashtag #BPD (borderline personality disorder), for example, has 7.1 million views³. Videos tagged #ADHD have been viewed more than 11bn times and there has been a surge in adult ADHD self-diagnoses⁴. NHS prescribing data shows a 40% rise in prescriptions between 2015/16 and 2020/21⁵.

This could be because certain groups say that they don’t feel heard by health care practitioners (HCPs). Women report feeling ‘dismissed’ by HCPs, so are more likely to speak to family/friends, do a Google search or read blogs before visiting a GP or consulting the NHS⁶.

iCrossing keyword research has found a 32% increase in searches on health forums across a range of topics and ailments since 2019.

This is also true of younger people. A study found that 58% of Gen Zs surveyed who were frustrated with healthcare felt they weren’t listened to, rising to 72% of those Gen Z participants who identify as female⁷.

Developments in technology have also enabled us to be much smarter about our self-care⁸. Smart fitness devices collecting personal data are helping us to better understand nuances in our own health. Virtual medical services have improved vastly in the last few years and over half of UK consumers would now trust a health tech app to diagnose them. Digital therapeutics are playing an increasingly important role in improving the management of chronic health conditions⁹.

1. [Lenstore public health search habits study](#)

2. [Hunger: The dangers and benefits of self-diagnosing online](#)

3. [Hunger: The dangers and benefits of self-diagnosing online](#)

4. [Guardian, June 2022: TikTok trends or the pandemic? What's behind the rise in ADHD diagnoses](#)

5. [Telegraph, October 2022: Number of people seeking ADHD diagnosis soars since lockdown](#)

6. [DHSC 'Women's Health - Let's talk about it' survey](#)

7. [LovedBy Gen Z healthcare survey](#)

8. [Hearst, Trends 2022: Smarter self-care](#)

9. [McKinsey & Company: The health benefits of digital therapeutics](#)

PART 1 :

INSIGHT AND IMPACT

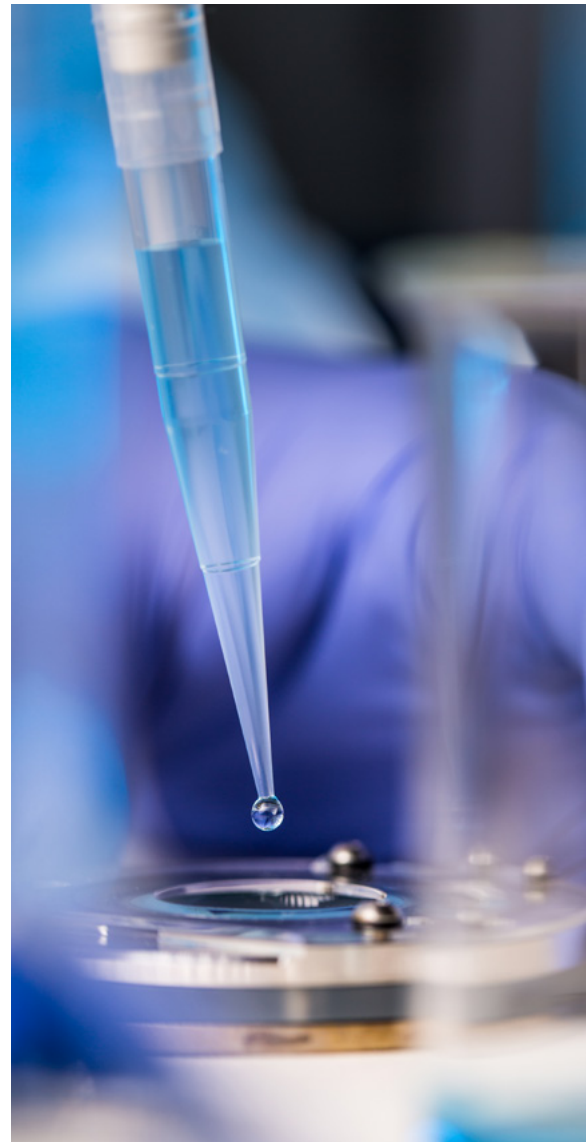
Communication challenges

The NHS is also limited in how it communicates with its patients – primarily via phone and post. This means it isn't keeping up with changing trends and could be losing younger people to platforms like TikTok when it comes to health and wellbeing advice.

Research found that just 3% of Gen Z had been communicated with through social media when interacting with a healthcare provider, but 47% ranked social media as their number one way of being communicated to about something that's important to see and properly understand¹.

There's also increased interest in telehealth. Google searches for 'online doctor consultation' experienced a 21% year-on-year increase in the past 12 months (Aug 2021–Jul 2022 versus Aug 2020–Jul 2021). Equally, iCrossing data found telemedicine companies are experiencing year-on-year rises in search.

According to BMC, clinicians and managers working in the Allied health sector believe that telehealth has its benefits for those living in more rural areas. 61.4% of clinicians and 51.59% of managers believe telehealth benefits the ability of patients in rural/remote locations to access services². It's important to note that there are concerns regarding equity of access, with many socioeconomic barriers to adoption. These include the cost of internet access and lack of technological knowhow.



There are other channels of communication for brands to explore – for example the majority of employees expect their company to play a meaningful role in keeping them healthy³.

1. [LovedBy Gen Z healthcare survey](#)
 2. [International Journal for Equity in Health: The potential impact of allied health professional telehealth consultations on health inequities and the burden of treatment](#)
 3. [Edelman Trust Barometer Special Report: Trust and Health](#)

PART 1 : INSIGHT AND IMPACT

Impact

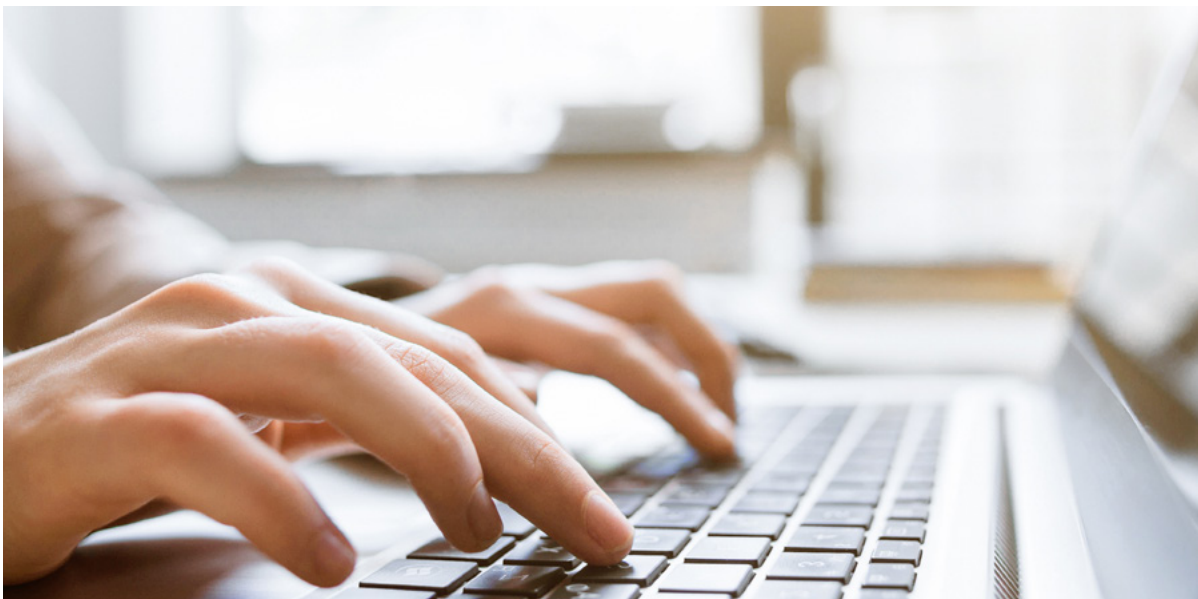
There is opportunity to be a trusted healthcare voice in places the NHS doesn't reach. The NHS is not able to adapt fast enough, and access to it can be difficult. People are seeking different sources of information.

There are information gaps to fill with digestible, trustworthy content that speaks to your audiences where they are online and in the ways they want to engage.

There's also opportunity to increase reach by providing knowledgeable and helpful content online, that ranks well on Google. Pharmaceutical companies have seen a 2-point rise in trust compared to pre-pandemic levels; they're no longer seen as distrusted in the UK. CEOs of

healthcare companies are more trusted to tell the truth about health issues than government leaders and journalists¹.

Self-diagnosis is not just about information; it's about taking action too. 45% of 16- to 24-year-olds buy medicine based on their self-diagnosis, followed by 32% of 35-44-year-olds. Authors of a BMJ report are calling for a more cautious diagnostic approach to ADHD to help reduce the risk of overdiagnosis². This is one reason why trusted voices who provide impartial and evidence-based information are so vital across all corners of the internet.



1. [Edelman Trust Barometer Special Report: Trust and Health](#)
2. [The BMJ: Attention-deficit/hyperactivity disorder: are we helping or harming?](#)

PART 1 : INSIGHT AND IMPACT

Impact

Maria Bain,
head of audience intelligence,
iCrossing UK

“Our experience in working with some of the world’s biggest pharmaceutical companies has taught us that channel selection within this sector can – and should – expand beyond what you’d typically expect. There are opportunities across the digital eco-system for pharma companies to connect and engage their audiences with healthcare information.

“Always take an audience-first approach. This means taking the time to properly understand where target audiences are present or where they are asking and seeking out information; using data-led solutions to ensure marketing and content promotion efforts are not wasted.

“Investing time, money or resources in areas where there is no demand from your target audience can be futile. By knowing exactly who you are selling to, you won’t waste time or budget by marketing to the wrong people, on the wrong channels, or with the wrong messaging.

“In pharma, personalisation is critical to success, media wastage in this industry is not just a waste of marketing budget but potentially harmful to the business, brand and customer if messaging, content or subject matter is being served to the wrong users.

“We support our clients with audience profiling and channel usage identification to help inform their digital strategy planning and ensure they are present across the most opportunistic channels.”



PART 2 : **ACTION**

Action

Our digital experts have compiled four recommendations for brands to consider when looking for opportunities to become a trusted and responsible healthcare voice in this new online ecosystem:

- 1 Explore new channels
- 2 Produce trustworthy content
- 3 Use the right tone of voice
- 4 Be compliant



PART 2 : ACTION

1. Explore new channels

The channels that people use to find health and wellbeing information is ever-increasing. How can brands find where potential customers are and how can they interact with them to provide the most useful and timely information?

Start listening

Jill Alger, audience intelligence director,
iCrossing UK

“There are various avenues brands can take to find out what their audiences are asking – and no ‘one size fits all’ approach. Our audience intelligence team prides itself on leveraging and layering multiple sources of data and insight to both validate assumptions and provide a more holistic data rich picture of audiences’ needs and interests.

“For pharma brands, we would typically recommend overlaying insights from several sources, and use our proprietary methodology to distinguish and categorise questions and queries online that are being driven by customers/patients and healthcare professionals and industry professionals.

“We’d start with search listening to identify the themes and queries that are driving the highest volume of searches – as well as the themes that are currently rising in overall search interest. Overlaying this data with insights gathered from social listening allows us to uncover nuances in online discussions, plus emerging trends which might not yet be identifiable in search, due to a three-week delay in search volume data in Google.



“We also frequently incorporate insights from survey-based audience tools, which can provide a view of top interests, behaviours, and preferences, broken down by desired audiences. Using this cross-source approach frequently uncovers a much deeper level of understanding on what brands’ customers really need.

This, in turn, allows us to advise on the overarching query themes and channels on which they are being asked or searched for, providing additional insight to clients as to which channels, they should be prioritising in their digital activity. This helps them better reach their audiences and serve them content that answers the questions that they are actively seeking.”

PART 2 : ACTION

Reach your audience where they are

Lottie Namakando, head of paid media and planning, iCrossing UK

“The restrictions and limitations of marketing platforms do vary. There may be opportunities to utilise legally compliant platforms which permit broader targeting than others. For example, rather than using the Google Demand Side Platform for advertising, try exploring others like Adobe.

“Test paid platforms beyond pay-per-click (PPC) and Facebook and Twitter. Ensuring you have coverage across a variety of social platforms will ensure you’re able to reach your audiences where they are.

“In addition, YouTube and programmatic display offer excellent opportunities to engage with audiences and relay more information via video ads. Ensuring you have the necessary brand safety elements in place across your platforms makes auction-based targeting a suitable opportunity to engage with consumers in the awareness or consideration stages of their journey.

“Extend the reach of organic content to keep audiences up to date and timely with factually correct content. Organic reach will only stretch so far, coupling this with paid activity will help to increase the reach and visibility of your content.”



PART 2 : ACTION

Maria Bain, head of audience intelligence, iCrossing UK

“While brands must approach it with caution, TikTok is the fastest growing social media platform ever, and is only projected for further growth. While originally labelled a Gen Z platform, TikTok has expanded considerably into other demographics, and even demonstrated itself as a key player within the pharma space. Some TikTok therapists are even offering free mental health advice access on TikTok¹ – a trend we’ve already seen across dermatology and dermatologists.

“Another one to watch is podcasts. Interest in this audio format has grown at a staggering rate in the last few years. What’s more, Health & Fitness is now the sixth most popular genre of podcast in the UK. Pharma brands could really

capitalise on this opportunity. Podcasts generate fantastic levels of engagement and create highly intimate experiences with audiences.

“From an advertising perspective, compared to other channels, podcast listeners are characteristically far more open to being advertised to. 80% of podcast listeners say that advertisements don’t negatively affect the quality of the podcast and 55% have purchased an item that they heard about advertised on a podcast. Despite these impressive stats, the competition on this platform is less aggressive than on other channels, making it a great opportunity for brands to get in front of audiences where its competitors may not be.”



1. [Evening Standard, January 2022: Meet the TikTok therapists offering free mental health advice to millions](#)

PART 2 : ACTION

2. Produce trustworthy content

In the Wild West of the internet, misinformation is common. It's essential to provide accurate and informed medical information, to protect the public's health and wellbeing.

Luckily, Google prioritises E-E-A-T content – which means it demonstrates experience, expertise, authority and trust¹. If you want to rank well on Google's search engine results pages (SERPs), you need to ensure your content follows the E-E-A-T model.

*iCrossing UK's head of content, **Jo-ann Fortune**, explains what E-E-A-T content looks like:*

Experience

“Patients are increasingly looking to blogs, friends and Google for understanding in experience. For, as Google puts it, a content author to have ‘demonstrable, first-hand experience in a topic, such as lived experience of a condition’.

“This could come from either an expert in a field, case studies or first-hand patient accounts. Anyone who has a clear understanding of the problem, and the best next step for the reader in that context.”

Expertise

“The expertise built through this experience should also be evidenced. Google needs to see that ‘the content author has a high degree of knowledge, skill and understanding in a particular topic’.

“When you're planning or writing healthcare content, imagine the reader asking: ‘And what exactly makes you an expert?’. Then make sure that you have

the answer close at hand. For example, in clearly signposted author bios and carefully-referenced sources.

“Content doesn't always need to be written by an expert, but anything that could impact a reader's health and wellbeing should at least be reviewed by one. And regularly, as out-of-date content can also erode trust and put readers at risk.

“If you're tempted to explore the use of ChatGPT for topics other than interface experience (e.g. directing to information or helping a user complete a task on site), this expert, human review is critical.”

Authority

“Google defines an authoritative source of information as one ‘with a strong reputation for accuracy and reliability, particularly among industry experts’. So, if a key measure of success is that industry experts reference your content, consider why they'd do this.

1. [iCrossing: What does the E-E-A-T update mean for your site?](#)

PART 2 :

ACTION

“Is your content original, based on new research or first-person experience? Written by an expert associated with an independent body? The most comprehensive piece on a particular topic? Or offering readers unique value in its promise, for example access to personalised advice and support?”

“Again, you’re much less likely to find any of these qualities in bot-written content.

“Empathy and journey mapping exercises can help you structure content, journeys and systems to provide value and understanding to users.”

Trust

“It’s clear that trust is breaking down between the public and the NHS. Trust that the NHS has the resources to provide expert information, diagnosis and treatment for each patient when they need it. Trust that it can still provide the safety net it was designed to.

“Thankfully for healthcare providers, Google has invested huge sums of money in defining trustworthy content, in the creation of its Search Quality Evaluator Guidelines¹ (SQEGs):

“The website and its content are an accurate, trustworthy source of information, offering clear value to the reader with content that is written with a high degree of understanding of the subject.”

“This value and understanding is found in expertise and authority, defined in the E-A-T update to SQEGs in 2019 and the addition of an extra ‘E’ for ‘experience’ (E-E-A-T) in December 2022.”

Lottie Namakando, head of paid media and planning, iCrossing UK

“It’s important to build trust on social media too. Growing numbers of people are communicating this way, so make sure you’re visible and able to answer potential customers’ questions.

“Consumers will commonly engage with ads through comments. Ensure you are monitoring these engagements as well as those on organic posts to communicate directly and address any issues raised. This will help build trust with your audience.”

1. [Google: How our Quality Raters make search results better](#)

PART 2 : ACTION

3. Use the right tone of voice

The Kings Fund report states: “Remember, behind the numbers and headlines, there are people who are living with pain and anxiety because they are unable to get the care they need and families who are worrying as their loved ones wait for treatment.”

When people are searching for healthcare information they may be scared. They may be confused, panicked or angry because they’ve been unable to find information that helps them or that they understand.

This is why tone of voice is so crucial. It’s not just about answering questions, it’s about considering the context in which people are asking them. It’s about empathy and speaking in their language.



Jo-ann Fortune,
head of content, iCrossing UK

“Getting to grips with user emotions and intent will also help you craft a tone of voice that connects with specific audiences on specific channels.

“As some women report feeling dismissed by HCPs, they may instead look for empathy from family, friends and online peers. It could be important then to draw on female voices, flexing tone and selecting vocabulary that reassures them that you understand what they might be going through and the questions and concerns they’re likely to have.

“As Generation X is increasingly looking for mental health diagnosis information on social media, it might be to speed up waiting times and to compare symptoms. So first-person videos that connect through friendly vulnerability, and signpost self-diagnosis questionnaires, may help them start a recovery journey with you.

PART 2 : ACTION

“Your tone will flex depending on your audience. At iCrossing we developed a tool for a global pharmaceutical client to identify search terms more likely to be used by HCPs than patients. When developing content around these topics, we can then assume more familiarity with technical and medical terms and an academic tone.

“Empathy mapping – a 360-degree view of what your target readers are likely to say, think and feel, do, see and hear – gives you the context to define how to connect and where.

“But never tell a patient how they feel. Aim to speak to patients as individuals, addressing them directly, using modal verbs (‘might’ ‘may’), determiners (‘some people may feel’) and conditional clauses (‘if you would like to..’) to reflect their individual situations and preferences. An empathetic bedside manner is just as important online as it is in treatment rooms.

“In such a competitive landscape and in a sector where differentiating between HCP and patient searches can be a challenge, ensuring copy is tailored as much as possible to the specific audience you want to engage with, helps make your ads stand out and reduce irrelevant click traffic.”

As some women report feeling dismissed by HCPs, they may instead look for empathy from family, friends and online peers.



PART 2 : ACTION

4 Be Compliant

There are strict rules governing healthcare and medicine content online – as it can be a matter of life or death. Whether you're looking to post on social media or a forum or produce longer form content, always abide by the guidelines.

Lottie Namakando, head of paid media and planning, iCrossing UK

“When it comes to ‘Dos’, do ensure you have researched, read, and understood the restrictions, limitations, and guidelines of paid platforms, as pharma is more restricted when it comes to paid advertising compared to other sectors. Each platform will have an outline of what limitations they have, such as this page for Google¹, so ensure you have read this for each platform you use/intend to use.

“Do ensure all copy has been reviewed by your legal/compliance team to ensure all statements and claims are legally compliant.

“Be sensitive with your copy, don't be too specific or personalised as this can make consumers feel uncomfortable.

“Don't attempt to use customer data to build audience lists, retarget audiences or include text or make claims which cannot be legally substantiated.”

Maria Bain, head of audience intelligence, iCrossing UK

“While advertising regulations for pharma are multi-layered, providing the correct guidelines are followed, there is nothing stopping brands from leveraging a full suite of digital platforms and channels. These have the potential to engage their most valuable audiences and provide them with the information they are either actively seeking, or would have a high propensity to be interested in.”



1. [Google Ad Policies: Healthcare and medicines](#)

CONCLUSION

The public supports the NHS and trusts its healthcare information. However, the NHS is falling short when it comes to modern ways of communicating online, beyond nhs.uk. It struggles to keep up with a fast-moving world.

There's opportunity for healthcare and pharmaceutical brands to become a trusted source of online information. It's not about criticising or competing with the NHS – the British public has deep affection for it – but working alongside it.

Brands need to produce trustworthy and accurate content, based on knowledge and experience, not emotion or opinion. To emphasise that, though self-diagnosis can be a useful first step, it needs to be confirmed by a professional, particularly before medication is taken.

Most of all, brands need to consider and showcase the human stories behind the statistics and provide empathetic and timely information.

By taking an audience-first approach, you can understand what information people need and in which channels they wish to find it, whether it's social media, forums, search engines or elsewhere.

With the right insights and knowledge, you can understand your audience and speak to them where they are, in their voice. By using data-led solutions, you can fill in content gaps and communicate valuable and effective information in the right way, in the right places.

iCrossing can help. Our content and SEO experts know how to speak your customers' language and produce high-quality optimised content, so that when people are searching for information, they find you.

Our data and consumer insights teams provide agile digital data to transform your audiences into your customers with simple-to-activate insights.

Don't just keep pace with digital change – get ahead and future-proof your business. Give your customers the high-performance experience they're looking for plus be more agile with content, so you can easily keep up with an ever-changing landscape.

About iCrossing

iCrossing is a digital agency that works with businesses who are ready to create real, digital step-change. iCrossing is owned by Hearst, the world's largest independent media, entertainment, and content company. Being part of the Hearst family gives iCrossing access to Hearst audiences, data, consumer research and category experts, allowing us to better spot new insights, trends and innovative solutions for clients. Change. Made Simple.

www.icrossing.co.uk




Are you ready for a digital step-change?

We believe that moving too slowly in digital is the biggest risk your business faces. If you are ready to embrace change, we are here to help.

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