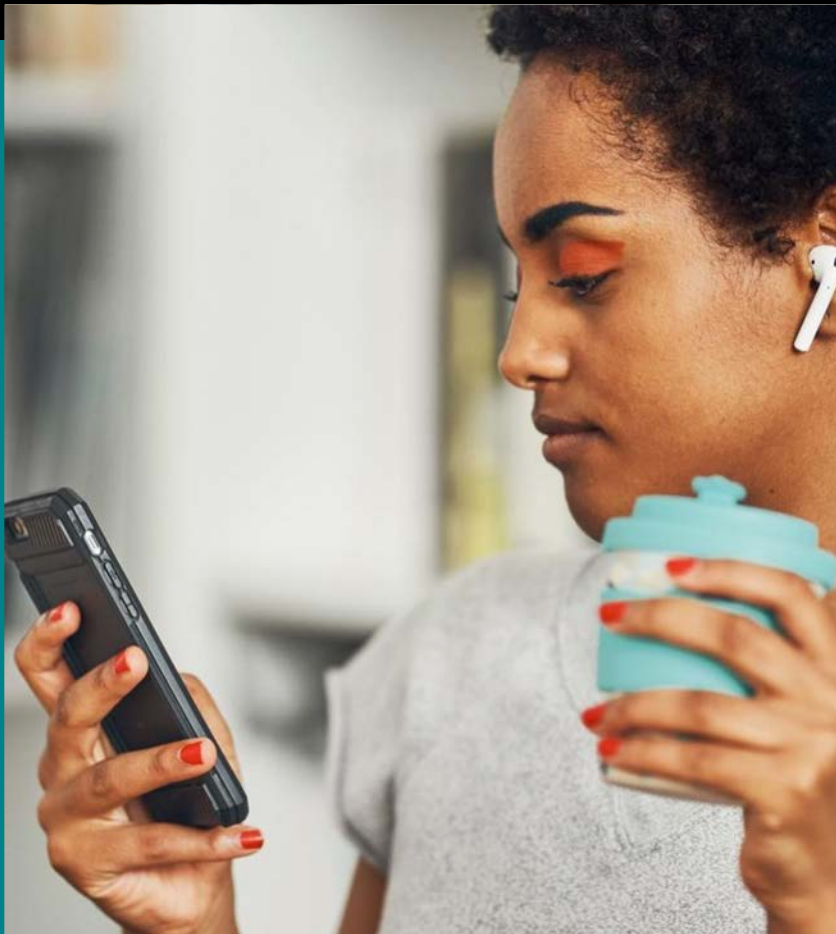


 HEALTHLINE MEDIA

2020 Social Influencer Trend Report





Executive Summary

2020 SOCIAL INFLUENCER TREND REPORT

In a media environment with so much clutter and fragmented viewpoints, influencers have carved out a win-win for all – authentic and relatable connections for consumers, while offering pharma marketers a direct line to patients that “influence” health behaviors.

With the ever-changing nature of the pharma industry and the world around us, it is critical to understand how social is being used and, more importantly, how have things shifted.

This report sheds light on key trends shaping influencer communities and identifies the “so what” for pharma to help make future social marketing decisions.

OVERVIEW

About the research

Report findings are based on two proprietary Healthline Media surveys and original reporting.

Health Influencers

- Sample of 194 Healthline influencer partners; analysis based on 157 respondents who focus on a health condition
- Online survey fielded: February 5-19, 2020

People Living with Health Conditions

- Sample of 1,000 respondents living with a health condition, recruited by Opinion for Good
- Online survey fielded: January 23 to February 7, 2020

Health Influencers

PROFILE

81% cover health condition-specific content

95% personally experience or have experienced a physical or mental health condition

What is an influencer?

Any health advocate, writer, blogger, social media content creator /influencer, or support group moderator who provides valuable health information or support to you. It is often someone with a health condition who shares their experience online and advocates for the well-being of others with a diagnosis of the condition.

APRIL CHRISTINA
@IAMAPRILCHRISTINA



People Living with Health Conditions

GENERATION

Gen Z
(13%)

Age: 18-22

Millennial
(26%)

Age: 23-38

Gen X
(29%)

Age: 39-54

Boomer
(29%)

Age: 55-73

GENDER IDENTITY

Female (50%)

Male (49%)

TOP CONDITIONS

Anxiety: 26%
Weight mgt: 17%
Depression: 17%

T2D: 14%
Asthma: 12%
RA: 9%

Digestive conditions: 8%
Cancer: 7%

Psoriasis: 6%
MS: 5%

A powerful marketing lever

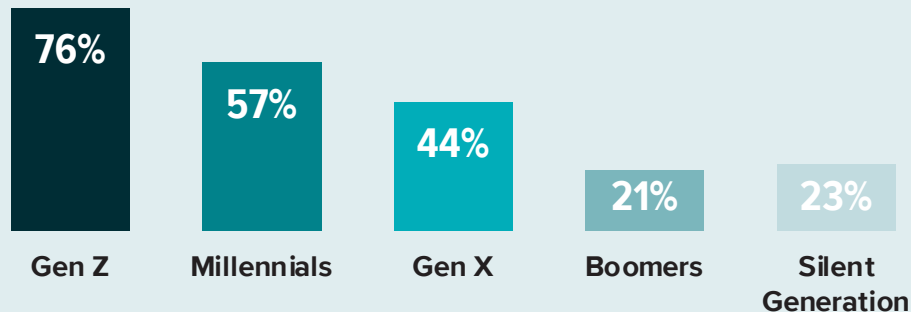
To lay some groundwork, let's look at the influence of influencers today. 44% of people with a health condition value the advice or opinion of a health influencer, and among those who value them, an overwhelming 98% value and 99% trust their advice.

Who values influencers the most? There is a skew toward younger generations, especially Gen Z and millennials, and certain condition segments have higher tendencies to turn to influencers, such as MS, cancer, and diabetes.

When do people start following them?

Diagnosis is a key trigger, with a third beginning after being diagnosed (34%), followed by 21% when conducting research about their health condition.

WHO VALUES HEALTH INFLUENCERS?



CONDITIONS

64% MS

62% Cancer

62% T1 Diabetes

61% Psoriasis

53% Digestive conditions

67%
recently diagnosed

57%
use social platforms
for health

N = 1,000 people diagnosed with a health condition.

N = 438 people diagnosed with a health condition who value the advice of health influencers.

Underlying motivations

There is this sense of humanity that comes from influencers and within these communities, but not for a lack of knowledge and expertise.

Why do people follow influencers? To get advice and tips on their condition, learn about treatments – the practical – and to learn from their stories and feel inspired – the personal.

Why do they want to take something so personal, and in some instances painful, and make it available and open for everyone to see? There is a **deep desire to share and help** when you dive into influencer motivations. This gets rooted on an emotional level to provide support and help others feel less alone, but also to advocate and educate on their condition, as seen in the data.

WHY HEALTH INFLUENCERS HAVE A SOCIAL PRESENCE

EMOTIONAL SUPPORT 95%*

Help others feel less alone, provide encouragement and emotional support, and inspire others

AWARENESS 91%

Raise awareness about a health condition

ADVOCACY 85%

Advocate for people with a health condition

PRACTICAL HELP 80%

Provide advice and tips to help people manage their condition

MORE THAN MY CONDITION 80%

Connect with others as someone who understands their lives beyond their condition

ELIZ MARTIN
@THESPARKLEDLIFE





Key Findings

2020 SOCIAL INFLUENCER TREND REPORT

- 1 The influence of influencers:** Value in driving health actions for pharma
- 2 Preferred medium:** Video and YouTube represent biggest untapped opportunity
- 3 Measures of success:** Hard metrics matter but personal connections are also important
- 4 Brand relationships:** Trust and creative license nurture influencer-brand relationships

KEY FINDING #1

Value of health influencers in driving health actions



TREATMENT

A mutual focus on treatment

An influencer's diagnosis is often what sparked them to create their social media presence, so it is no surprise that treatment comes up within their community.

In fact, 41% of people with a health condition decide to follow influencers specifically to **learn about potential new treatments**. Similarly, influencers have shared about their experiences with treatment and doctor conversations.

“

I had just been diagnosed with fibromyalgia, and an influencer gave me some good advice that I took to my doctor and it made a difference. — *Consumer respondent*

41%

people follow health influencers to learn about potential new treatments for their condition



57%

(net) influencers have shared their experience speaking to their doctor about treatment



Boomers and Gen Xers are even more likely to turn to influencers to learn about treatments.

44% Questioned my current treatment plan

43% Spoke to my doctor about a new treatment option

38% Spoke to my doctor about switching medications

21% Requested a specific brand of medication from my doctor

N = 438 people diagnosed with a health condition who value the advice of health influencers.
N = 157 health influencers

Influencers drive action

Not only do they talk about it, but influencers are **driving tangible, real-world actions** when it comes to treatment. From encouraging treatment discussions to serious end of funnel metrics like requesting a specific brand from a doctor, the impact of these influencers is very real. 74% of people with conditions are likely to take these actions as a result of a recommendation by a health influencer, and 50% have already done so.

This is a gold mine for brands and marketers. When you partner with influencers, you get involved in the halo effect of their influence on consumer behavior.

74% (net)

Are likely to speak to their doctor about treatment as a result of a recommendation by a health influencer

- 46%** About a new treatment option
- 39%** About switching medications
- 31%** Question my current treatment
- 26%** Request a specific brand

50%

Have already spoken to their doctor



TREATMENT

A range of health behaviors

While treatment remains an important topic of discussion in health communities, influencers are also impacting a range of health behaviors.

Consumers are taking action when it comes to general nutrition and lifestyle tips, products or services, and choosing what websites to visit. The value comes from covering a range of topics, which can in turn impact a range of consumer behaviors.

These actions reflect consumers' increasingly holistic view of their health. From content interests to health actions, consumers are seeking information, advice, and support around their condition, as well as nutrition, fitness, mental health, and a myriad of other topics.

ACTIONS TAKEN IF RECOMMENDED BY A HEALTH INFLUENCER I FOLLOW

Purchased products or services to support my overall health

44%

Tracked my symptoms and medication side effects

33%

Visited websites that health influencers partner with

28%

Tried products or services to complement my treatment (e.g., vitamins, yoga, acupuncture)

26%

Followed tips about nutrition, fitness, or general lifestyle

23%



N = 438 people diagnosed with a health condition who value the advice of health influencers.

KEY FINDING #2

**Video and YouTube
represent biggest
untapped opportunity**



The preferred medium

The data shows incredible value toward the impact of health influencers, but what is happening in the social space and where?

Growing opportunity with Instagram and YouTube. 68% of health influencers plan to focus more on Instagram this year, and there is an untapped market for influencers to do even more on YouTube as more consumers move there.

Facebook leadership is weakening. Across generations, Facebook is still used, but we see incredible growth in other platforms. YouTube and Twitter are more popular among millennials, and Instagram is tied with Facebook as the #1 platform among Gen Z audience.

Marketers, evaluate that you are using the right platform to engage with the right audience in your campaigns and programs.

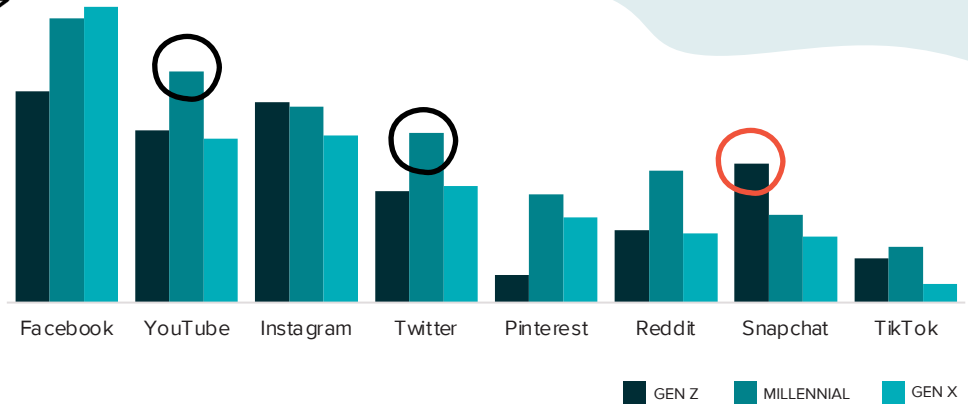
PLATFORMS MOST USED

PEOPLE WHO FOLLOW HEALTH INFLUENCERS

Facebook – 82%
 YouTube – 56%
 Instagram – 52%
 Twitter – 39%

HEALTH INFLUENCERS

Facebook – 90%
 Instagram – 83%
 Twitter – 70%
 YouTube – 29%



N = 157 health influencers

N = 328 people diagnosed with a health condition who follow health influencers and use social media

CONTENT TYPE

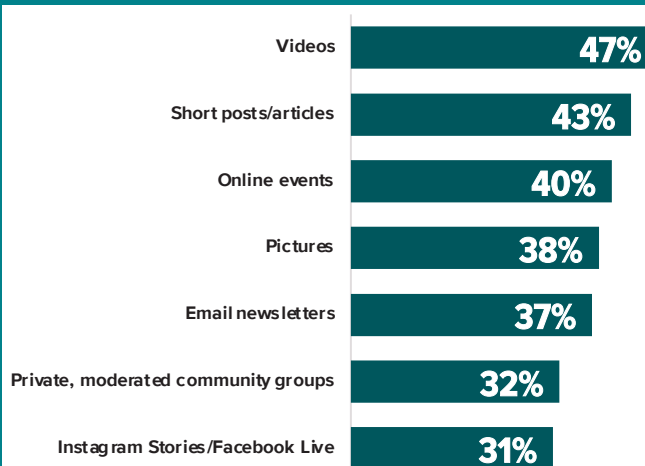
Video poised to grow

When asked about the types of content people living with health conditions would like to see, video tops the list.

Over half of influencers currently use video and 38% plan to focus more on video this year. Influencers and consumers alike are turning to video content that is more engaging, real, and relatable.

In addition, consumer interest in online events is key as publishers and brands continue to evolve their content strategies and engagement tactics in this virtual-first world of COVID-19.

CONTENT / ACTIVITIES PEOPLE WOULD LIKE TO SEE



INFLUENCERS' FOCUS ON VIDEO

54%
currently use video

38%
plan to focus more on video in 2020

N = 157 health influencers
N = 438 people diagnosed with a health condition who value the advice of health influencers

“

I find 2020 is the year of video. Followers are more engaged with video content versus static posts. It's more **engaging, real and relatable.**



KEY FINDING #3

**Hard metrics matter
but personal connections
are also important**

Measures of success

Conversations with influencers shed light on the need for more industry education about metrics. This begs the question: What does success really look like? **Hard metrics** like comments and shares are important, but unfortunately, they are often all that partners and brands ask for.

To influencers, it is so much more than the numbers. The **value of the personal testimonials and direct messages they receive** carry a lot of weight, and brands should put more weight on these as success factors too.

COVID-19 has driven even more focus on personal connections as consumers are craving help and guidance from someone they can relate to and trust.

HARD METRICS VALUED BY INFLUENCERS

- *Comments (78%)
- *Shares (76%)
- Followers (71%)
- *Post Likes (68%)
- Views (61%)
- *Page Likes (50%)
- Clicks (50%)

PERSONAL CONNECTIONS VALUED BY INFLUENCERS

- Testimonials (63%)
- Direct Messages (61%)
- Emails (43%)

FOLLOWERS

***Top 4 actions followers take**
on social platforms of
influencers

44%
of followers DM or provide
personal testimonials

N = 157 health influencers

N = 438 people diagnosed with a health condition who value the advice of health influencers.

KEY FINDING #4

Trust and 'creative license' nurture influencer-brand relationships



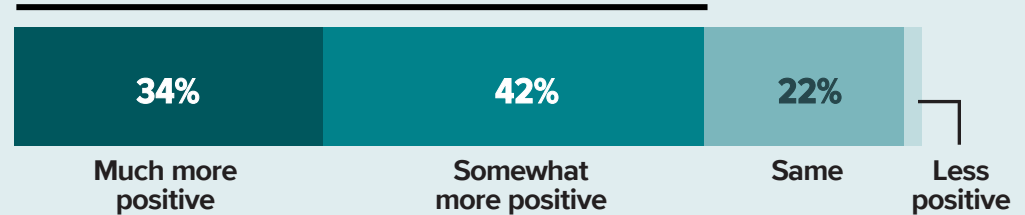
Influencer-brand relationships

There is a big halo effect and a lot of brand benefit when influencers and brands partner together. 76% of consumers have more positive perceptions of brands that partner with health influencers they follow. Influencers also think more positively of brands that partner with influencers like themselves. Win-win for brands!

But consumers want to know when influencers are working with brands, and they are forthright in providing a constant feedback loop. Consumers will reach out and question influencer posts: Are you really using that? How do you feel about that product? The community is reaching out, confirming their authenticity, and in turn keeping them in check. They are listening.

PERCEPTION OF BRANDS THAT PARTNER WITH HEALTH INFLUENCERS I FOLLOW

76%



68% Influencers think more positively of brands that partner with health influencers

9 OUT OF 10 people say it's very or somewhat important for influencers to disclose their business relationships

N = 157 health influencers

N = 438 people diagnosed with a health condition who value the advice of health influencers.

Opportunity for pharma brands

The good news for pharma marketers is that influencers rank this industry among top categories they would consider partnering with, in addition to nutrition and fitness brands.

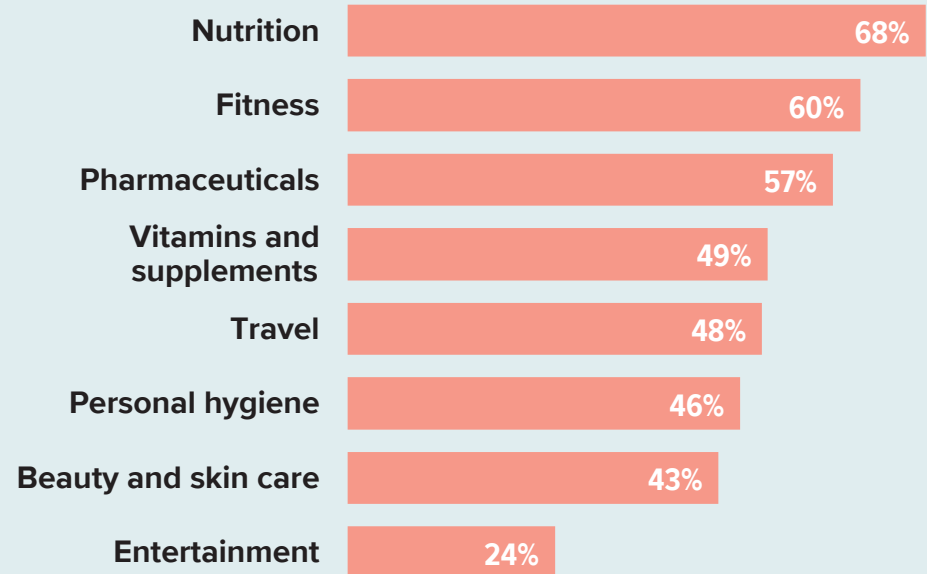
But influencers won't partner with just anyone. They **evaluate partnerships most heavily around values and trust**. 76% select brands that are aligned with their personal values and 75% due to trusting them to create the content they feel is appropriate.

Relationships are key, now more than ever.

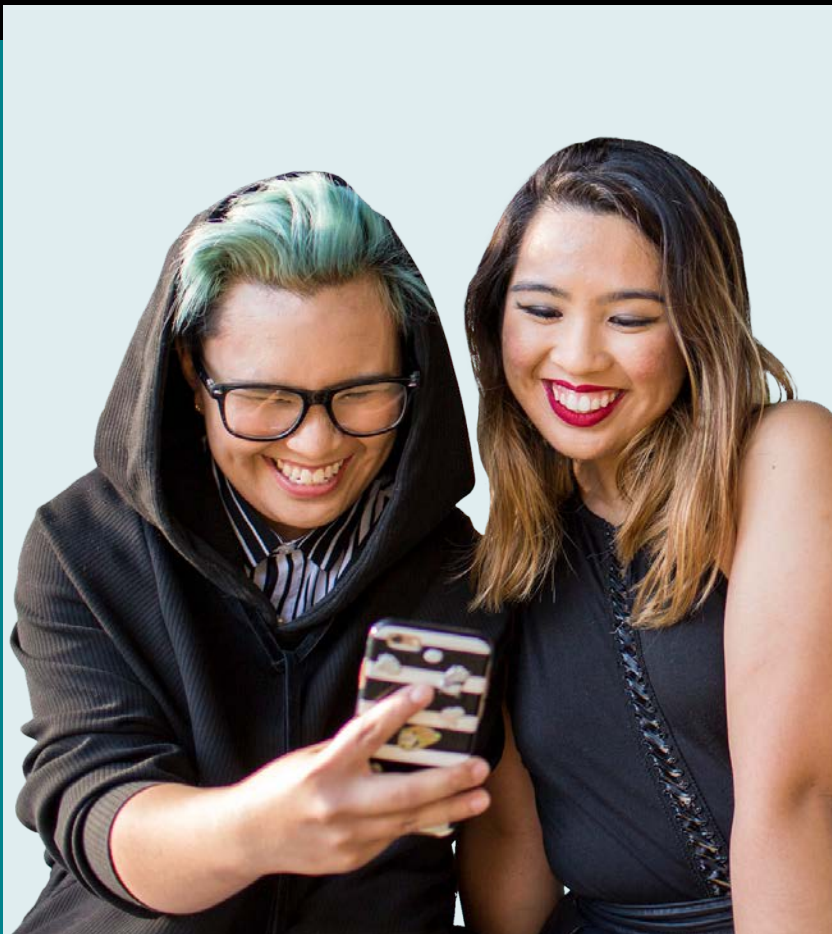
There must be synergy and mutual benefit. Influencers want to align with brands with similar communication and dialogue; if an influencer is open and transparent, they want to see the brand doing something and taking action. Brands, take note!

88% of influencers are interested in partnering with brands

TYPES OF BRANDS HEALTH INFLUENCERS WOULD CONSIDER PARTNERING WITH



N = 157 health influencers



Key Takeaways for Pharma

2020 SOCIAL INFLUENCER TREND REPORT

There's power in the personal. Influencer marketing and online communities are the best way to unleash this power for your brands.

Health is broad and people are more than their condition. Expand your aperture, and connect holistically with the whole person.

People value the truth, and the truth is often messy. Find ways to embrace the raw realities, internally or through partnerships.

Video is more engaging than static content. Use more video and reach more people.

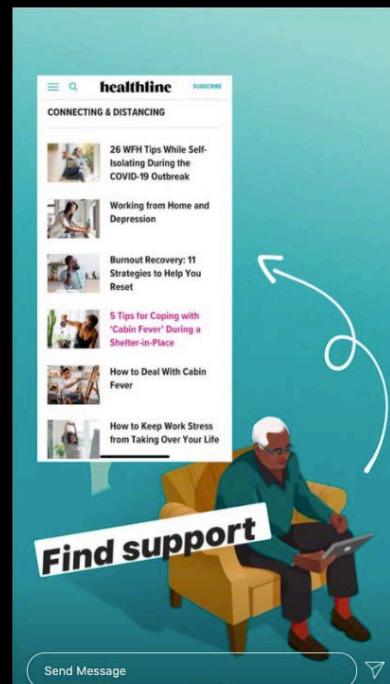
FROM INSIGHT TO ACTION

Value of Working with a Trusted Partner

With all of this potential and influence, how can you make this work for your brand in a way that is going to be both safe and effective, and reap the benefits while avoiding the pitfalls?

High-quality publishers, like Healthline Media can open doors for pharma brands in social, helping them connect in authentic and meaningful ways in the social space.

- Screening and vetting
- Long-term positive relationships
- Performance management
- Scale
- First-party data





HEALTHLINE MEDIA

Want to know more?

Check out our latest consumer insights and trends at
[HealthlineMedia.com](https://www.healthline.com).

Like what you see?

Get in touch with your Healthline Media representative or Elisabeth Paredes at eparedes@healthline.com today to learn about how we can build social activations and influencer programs, together.

healthline



GREATIST

