2025 REPORT

Inside HCP Decision-Making

The latest market research shows HCPs are hungry for cost & coverage insight.

Can you give them what they're looking for?

The Institute@Precision is part of Precision Medicine Group, an ecosystem of organizations spanning discovery to commercialization, purpose-built for precision.

HCPs have strong opinions about access

How do your target healthcare providers (HCPs) really want to interact with your brand when it comes to market access?

Pharmaceutical companies devote considerable resources to understanding clinical perception and payer positions, but rarely have data to inform their market access pull-through strategy.

Our annual Healthcare Provider Survey taps into the behaviors and preferences of practicing HCPs, giving pharmaceutical marketers unique HCP insights.

We talked to HCPs about how market access factors into their decision-making process, what they really think about sales representative interactions, how they use EHR platforms, and the challenges of patient out-of-pocket (OOP) cost visibility.

For our 2025 report, we surveyed 100 actively practicing healthcare providers across multiple levels and specialties about a variety of topics impacting market access pull-through.

24.7
average years in practice

119
average patients seen per week

5
average pharma reps seen per week

Key themes

In 2025, HCPs expressed that access is a major driver of prescribing behavior. Cost and coverage remain central, but now personalized insights, trusted head-to-head comparisons, and digital content are gaining momentum with unprecedented speed. It's becoming increasingly critical for reps to bring relevant, real-world data based on actual HCP claims to the table, and for brands to show up in a variety of channels to meet HCPs where they are.

> Sales reps are still the go-to source of cost & coverage information, but HCPs are also turning more to the digital realm to find the information they need.

For the first time in 2025, brand.com websites were cited as second only to pharma reps as the primary source for brand savings cards and prescription drug plan information.

> Cost & coverage concerns aren't going away anytime soon.

89% of HCPs say out-of-pocket costs are important or very important to their prescribing decision.

> An increasing number of HCPs cite data-driven, tailored access messaging as a critical component of prescribing decisions.

86% of HCPs say plan-specific drug coverage info is important or very important to their decision-making – up from 77% last year.

Cost and coverage are still top of mind, but the context has shifted

If there's one constant that we've seen across the years of HCP survey data, it's this: cost and coverage are still foundational to prescribing decisions. In 2025, out-of-pocket cost and insurance coverage remain major drivers of prescribing decisions. But how HCPs are evaluating those factors—and how brands are supporting them—has evolved.

Providers are now balancing affordability with access logistics, payer-specific differences, and growing patient demands.

Clinical confidence alone no longer determines the products providers choose. Cost, coverage, and prior authorization (PA) clarity are the biggest concerns after clinical confidence.

This year's data shows growing demand for clear, HCP-specific plan insights and not just broad trends or outdated averages.

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How well does your brand communication reflect the day-to-day coverage realities that HCPs encounter in their patient population?

90%

90% have changed a patient's treatment based on coverage

89%

89% of HCPs say OOP cost is important or very important when choosing among drugs in the same therapeutic class (up from 83% in 2024)

85%

85% say knowing the PA process is helpful or very helpful

HCP-specific messaging is the new market access minimum expected

Overarching or high-level access messaging is no longer resonating. Providers now expect communications that reflect the specifics of their local patient population and the real-world coverage scenarios that they navigate daily.

Brands that go beyond simple "covered/not covered" messaging to deliver personalized insights (ie, info on the plans HCPs see in their practices, PA requirements, and step therapies) stand out. Precision and personalization aren't simply a bonus anymore, they're the expectation.

Make your brand and reps stand out as resources to rely on by prioritizing coverage messaging that's tailored to the plans your HCPs see most in their practices.

7 in 10

say they're more likely to act when data reflects their own coverage environment

86%

86% say it's important or very important to understand plan-specific drug coverage (up from 77% in 2024)

Digital platforms are earning greater importance in the access conversation

While reps are still the leading source of access information, digital formats are on the fast rise. In 2025, providers expect to engage with brands across multiple channels, and they're looking for a more integrated experience with those touchpoints.

Whether it's EHRs, brand websites, or platforms like GoodRx, the new path to access information is omnichannel. And as more HCPs express a preference for digital-first formats, brands have to evolve how they're delivering formulary insights and savings support.

Don't just pick a single platform and design for many. HCPs are moving more easily among live, digital, and embedded tools. Your access messaging should be, too.

54% of HCPs have used a brand.com site to check coverage (up from 46% in 2024)

Top 3 preferred means of learning about cost and coverage:

01	02	03
Digital iPad materials presented by a rep	Printed leave-behinds	Email from a pharma rep

Patient cost concerns are now front & center

HCPs aren't just responding to payer restrictions, they're managing their patient's expectations, too. With affordability now being a shared priority in clinical conversations, providers need fast, accurate cost details available at their fingertips.

Many say their patients are proactively asking about switching to better-covered medications, and HCPs are looking to brands for the data that will help guide those decisions in real time.

Bring cost conversations upstream. Giving HCPs tools to proactively address patient affordability concerns can influence prescribing behavior earlier—and prevent mid-treatment disruptions.

Up to 3 in 5

patients over the past year have asked to switch medications based on perceived better coverage

89%

When choosing between products in same therapeutic class, providers say OOP cost plays a major role in prescribing decisions: *89% say it's important or very important*

Reps can help close the EHR confidence gap

HCPs are looking for more seamless ways to navigate access, and the potential lies in their existing EHR platforms. But the tools aren't always intuitive, and pharma reps can play a vital role in helping providers make better use of what's already at their fingertips.

While nearly 9 out of 10 providers say EHR-embedded formulary support would be helpful, few say they've ever received pharma guidance in this area. This presents a unique opportunity to train reps to understand EHR workflows and offer compliant, actionable tips to HCPs, especially when it comes to locating PA requirements or coverage criteria. Arming reps with EHR fluency not only helps HCPs work more efficiently—it builds trust, credibility, and lasting relationships at the point of care.

? Are your reps equipped to help HCPs locate access and PA support inside the systems they already use every day?

85%

85% say receiving formulary info in the EHR would be helpful

79%

79% are open to reps helping them use their EHR more efficiently

Reps boost their credibility by showing up with the right data

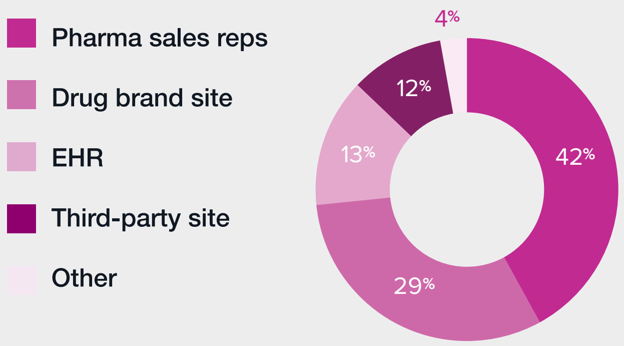
Pharma reps continue to be HCPs' leading source of cost and coverage information, cited more often than brand websites or third-party tools. However, in 2025 we saw that trust isn't assumed—it's earned.

Only 15% of HCPs said they are very confident in the accuracy of coverage info shared by reps. However, 51% are at least somewhat confident, leaving nearly 1 in 3 HCPs either neutral or not confident in the rep-provided data.

Although the majority of HCPs still look to reps as a primary source of coverage and savings information, rep credibility isn't a given in every circumstance. This presents an excellent opportunity to prove value through precision, personalization, and channel alignment. Reps can establish and cement their roles as reliable resources by offering relevant, actionable information in every HCP interaction, and following up with support and guidance through digital channels.

? Are your reps equipped with tools that build trust—and access insights that reflect what HCPs are actually seeing in their own practice?

Top-preferred channels for accessing savings and coverage info



Oncology Spotlight

Bring oncology access discussions into the real world

This year's survey data showed us unequivocally that in-person interactions are the key to transmitting oncology market access information. HCPs consistently cited reps as the #1 most helpful source for oncology access updates—but primarily in the context of in-person visits or events.

Oncology comes with unique challenges, from complex treatment modalities to site of care restrictions and personalized medicine and biomarkers to consider. Keeping up with the clinical data is task enough for HCPs. When it comes to access barriers, they don't rely on their own research: instead, they turn to direct rep interaction for support.

The value of live, face-to-face conversations in oncology access can't be overstated. And while HCPs also cite email and webinars as helpful channels for access education, brands may find the most traction in building relationships and providing information via live interactions, while following up digitally to keep lines of communication open.

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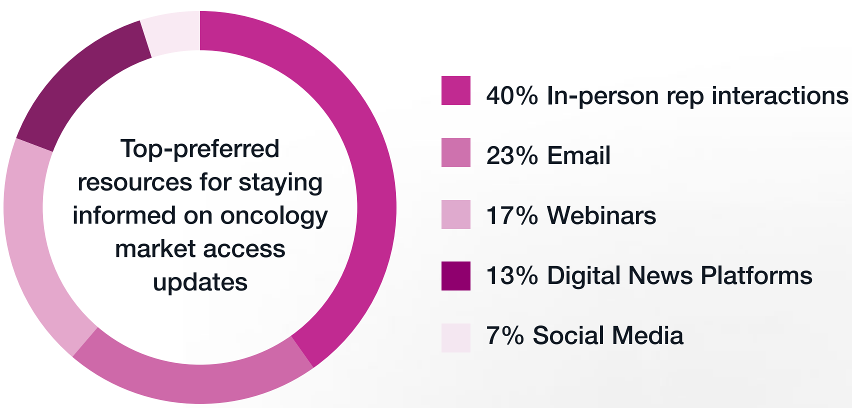
Are your reps equipped with tools to provide valuable oncology access insights both during in-person visits and as follow-up support?

Is your brand offering a seamless experience by proactively addressing access concerns via digital channels?



Rare Disease Spotlight

Rare disease HCPs lean on brand expertise

Over half of 2025's survey respondents treat rare diseases—an unprecedented demographic shift. Rare disease patients are becoming more represented in pharmaceutical production, but coverage gaps, prior auth delays, and lack of benefits visibility all cause access friction, and, in many cases, they directly influence patient care. While a patient's need may be crystal clear to a prescribing HCP, getting from the prescription stage to actual start-of-care can feel like an uphill battle.

Because of the clinical and access nuances that go hand-in-hand with specialized therapeutic areas, rare disease HCPs lean heavily on access information that comes directly from brands. The majority of these HCPs cite pharma reps as the "most helpful" resource for staying informed on market access for rare disease treatments, with the second most helpful resource being the drug brand site itself.

For brands, the implications are clear: more tailored, HCP-specific tools that match the clinical sophistication of their treatments are pivotal for prescription uptake. Reps and digital resources must deliver not just the "what" but the "how," and do it clearly, efficiently, and with empathy.

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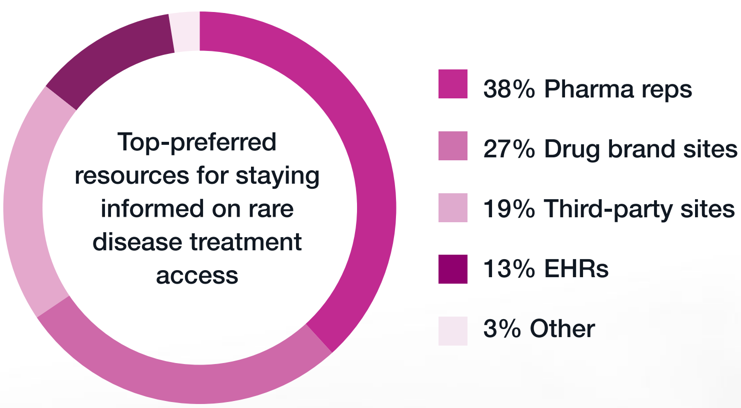
How well do your brand materials reflect the real-world access challenges that rare disease HCPs navigate regularly?

Are you proactively equipping HCPs with resources to support affordability conversations with their patients?



Biosimilar brands face unique perception challenges

As an increasing number of biosimilars meet FDA approval and broaden treatment choices, HCPs have more options than ever before when it comes to biologic drugs. However, some HCPs are still reticent to swap from an originator.

> "I do not voluntarily switch a patient to a biosimilar. The insurance company is the one who may require it."

Biosimilar uptake is notoriously slow in the U.S., but many HCPs will consider a switch if they feel confident in the drug's efficacy—the outlying questions are usually cost and coverage. However, only 36% of surveyed HCPs believe that private label biosimilars can, in most cases, significantly reduce spending on biologic drugs.

Questions of clinical efficacy are rapidly being put to rest by brands via equivalence trials and real-world evidence, but negative access perceptions remain. HCPs need assurance in the form of detailed coverage information and potential patient cost-savings, but brands may further boost confidence by providing pathway, PA, and formulary data. For biosimilars, this type of above-and-beyond messaging will be key to prescription uptake.

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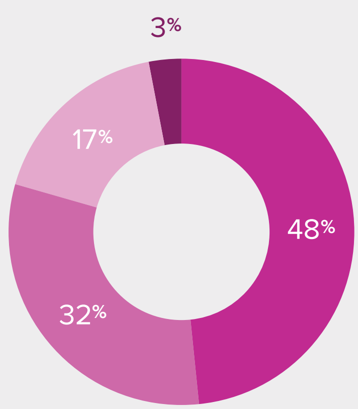
How confident are your reps in explaining payer-by-payer biosimilar differences?

What role can your team play in helping HCPs anticipate and respond to coverage-driven treatment switches?

Top factors HCPs look for to support switching from a branded biologic to a biosimilar

- Insurance coverage
- Patient's co-insurance responsibility
- Patient Support
- Other



Make the path to prescribing seamless and intuitive

We're seeing that in this evolving healthcare market landscape, clinical efficacy is no longer enough. Providers are having to navigate increasingly complex payer barriers, growing patient affordability concerns, and time-crunched workflows and prescription access timelines.

The brands that will experience the most strategic success and "breakthrough" in 2025 are the ones that help ease these access pain points, not just promote the same, rote access-related tools.

This means brands need to start showing up where HCPs already are, deliver personalized insights that reduce friction for them, and make sure that every rep interaction is action-oriented and data-based.

? Does your access strategy reflect the real world of HCPs or what your own brand thinks is ideal?