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Reprint Highlight from CBI's 2nd Annual eDetailing Conference, held September 18-19, 2003 in Princeton, New Jersey.

WHY PHARMA CAN'T IGNORE EDETAILERS

By Mark Schmukler

"Physicians are embracing online technology so pharmaceutical marketers can—and should—embrace online physicians."



This was the theme of a presentation by Elizabeth W. Boehm, Forrester Research Analyst, given at CBI's 2nd Annual eDetailing Conference, held September 18-19 in Princeton, New Jersey.

Boehm recommended that pharmas adopt some form of

Elizabeth Boehm eDetailing to reach out to an increasingly populated and receptive target audience, and she presented multiple data sets to support this position.

Doctors are Ready for eDetailing

Boehm first reviewed the results of Forrester's 2003 Technographics® Benchmark Study. This is a national survey of sixty thousand consumers, including 130 physicians in the US. Although the number of physicians in this study was small, the data suggests significant differences between physicians and the general population with regard to adoption of technology.

In general, physicians have embraced technology. They are more likely than other consumers to go online at least once per month (88% vs. 64%), are more likely to use mobile phones and PDAs, and a greater percentage of physicians have broadband access (40% of physicians vs. 23% of other consumers have broadband access at home).

eDetailed Docs are More than Ready

Next, Boehm reviewed results from the Forrester eDetailing Survey, an online survey of 1,820 physicians recruited through eDetailing vendors, including Group DCA (formerly DotCom Advisors), Physicians Interactive, and RxCentric (purchased by PI).

Boehm used a broad but clear definition of eDetailing: "A pharmaceutical-sponsored, Internet-based program that informs prescribers about products or diseases."

eDetailed Physicians cite a number of reasons for participating in eDetails. The most often cited reason is the ability to do it on their own time (89% of respondents) and 65% said because "they [eDetails] are less disruptive than reps". On the other hand, 77% cited honoraria as a reason (see "Show Me the Money").

Having shown that physicians are adopting technology at a faster rate than other consumers, Boehm went on to show that "eDetailed Doctors" are significantly more enthusiastic about technology than other online doctors. A greater percentage of eDetailed Doctors have broadband access at work and at home (e.g., 65% vs. 45% have broadband access). More than half of eDetailed physicians use a handheld Rx reference tool and 90% have completed an online education (eCME) course.

Show Me the "Money"

eDetailing can be very effective in influencing prescribing, although at a price. Honoraria having monetary value, such as text book discounts

or coupons, are often offered to physicians as an incentive for completing an eDetail.

Regarding honoraria --

"I love them! That's the reason I do eDetails!"

-- eDetailed doctor

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According to Forrester’s research, 67% of the eDetailed physicians ordered samples and 58% said they prescribed more of the featured drug after the eDetail (see chart, next page). “This is astonishing”, Boehm exclaimed.

However, 95% of doctors surveyed said honoraria “are the reason” or “would sway my decision” to participate in an eDetail (40% agreed with the statement, “I love them [honoraria]! That’s the reason I do eDetails!”). “This is frightening for pharma companies,” Boehm noted.

Weaning physicians off honoraria may be eDetailing’s Achilles’ heel. Clearly, everyone agrees it must be done, especially in light of possible implications vis-à-vis OIG anti-kickback guidelines and the PhRMA Code on Interactions with Healthcare professionals. Several speakers at the conference suggested that honoraria need to be replaced by other types of incentives (see “The Future of eDetailing” in this issue).

Pharma-phobic Docs

Concerns about security and anonymity remain. For example, 47% of eDetailed doctors said they do not want pharmaceutical companies to know their identity and also that they would rather have a third party manage their personal information than have to deal directly with a pharmaceutical company. These “Pharma-phobic” doctors’ responses to eDetailing are virtually the same as their “Pharma-friendly” colleagues in areas such as sample requests, prescribing, and requests for information and pre visits.

Vendor Analysis

Forrester analyzed and rated offerings from eight leading eDetailing vendors based on the strength of their current product offerings, strategies, performance and market presence. The vendors included in this self-reported analysis were Medsite, Group DCA, Aptilon Health, marketRx, closerlook, Physicians Interactive, Temel, and WebMD.

The analysis suggests that although general product features were similar, there are important distinctions in three key areas:

- Branded versus unbranded positioning with physicians
- Recruiting capabilities
- Analytics and access to data

When it comes to anonymity/security issues, these vendor product offerings form a continuum with regard to how much access pharma clients get to physicians. At one extreme, some eDetailers act as “neutral” intermediaries and separate their platforms and

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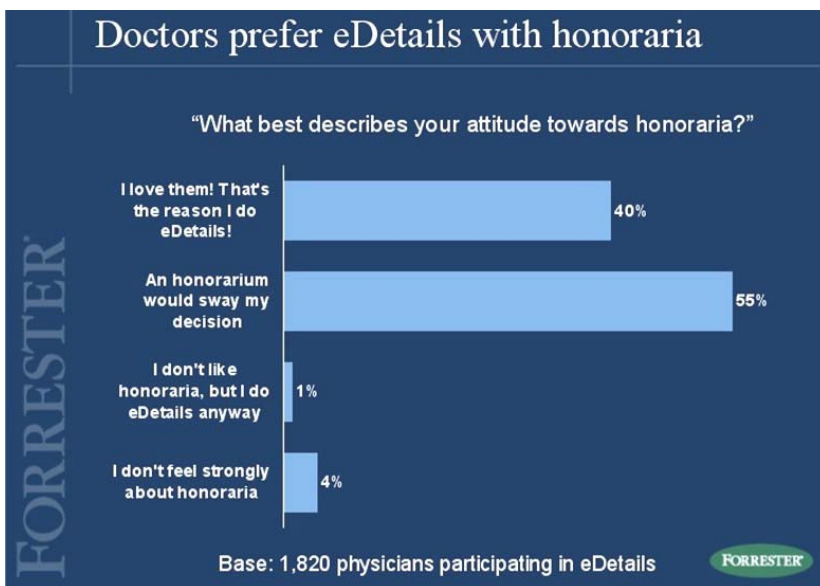


FIGURE: Doctors prefer eDetails with honoraria. Forrester’s 2003 Technographics® Benchmark Study and Online survey of eDetailed physicians. Copyright © 2003, Forrester Research, Inc.

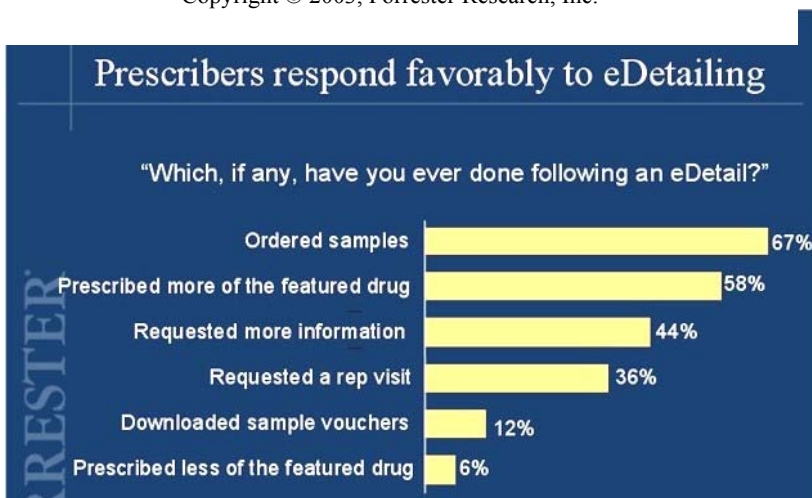


FIGURE: Prescribers respond favorably to eDetailing. Forrester’s 2003 Technographics® Benchmark Study and Online Survey of eDetailed physicians. Copyright © 2003, Forrester Research, Inc.

databases from the pharmaceutical company (e.g., Group DCA). Conversely, other vendor products are available as private-label solutions (e.g., closerlook).

When selecting a vendor, pharma marketers embarking on eDetailing programs should determine which features are most important for their particular needs.

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