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eDetailing: Yesterday, Today and Tomorrow

By **John Mack**

eDetailing proponents, inside pharma companies and outside, use survey data to justify their arguments for greater spending on eDetails. In some cases, however, the numbers seem to show confusing trends and even may suggest that eDetailing may not be all that it's cracked up to be.

At the recent Technology Supported Physician Detailing conference in Philadelphia, Liz Boehm, Principal Analyst, Healthcare & Life Sciences, Forrester Research, presented data from recent surveys of physicians regarding their attitudes toward eDetailing.

Boehm presented data from three different studies:

- **SURVEY #1:** 2003 Forrester survey of eDetailed physicians recruited through major eDetailing firms including Aptilon Health, closerlook, Group DCA, Lathian Systems, Medsite, Physicians Interactive, and RxCentric;
- **SURVEY #2:** 2005 Physicians and Technology Study. A survey done in conjunction with the AMA of 1,331 US physicians fielded via mail and Internet between August 2004 and December 2004 (referred to as '2004 data');
- Interviews of 10 marketing representatives responsible for eDetailing within pharmaceutical companies, including 6 of the top 10 US companies.

eDetailing Defined

Boehm defines eDetailing as follows: "A pharmaceutical- or medical device firm-sponsored, Internet-based program that informs prescribers about products or diseases."

Large Majority of Physicians Have Never Been eDetailed

"The research we have done," said Boehm, "shows that eDetailing is a viable marketing opportunity for pharmaceutical companies and one that to date has not been used to its best effect."

According to the 2005 Forrester study data (SURVEY #2), eDetailing "dwells at the fringe of MD marketing." Sixty-nine percent of physicians surveyed say they have NEVER participated in an eDetail and an additional 10% have participated in one or less eDetail per year.

According to Manhattan Research, which publishes physician research, the eDetailing market has grown from 40,000 physicians in 2001 to 246,000 physicians using electronic detailing in 2005—a number that is projected to increase to 268,000 in 2006.

According to a JupiterResearch 2005 survey ("Online Marketing to Physicians: Evaluating Physicians' Responsiveness to Online Detailing"), sixty-five percent of doctors who practice family/internal medicine and use the Internet weekly for work purposes said they participated in online detailing programs in 2005, compared with 54 percent of online physicians in 2003.

High prescribers are eDetailed more frequently than low prescribers, according to Forrester's numbers. Forty-eight percent (48%) of physicians writing more than 100 scripts per week have been eDetailed whereas only 26-28% of physicians writing 50 or less scripts per week have been eDetailed. According to Boehm, "there's a lot of room to grow" as many physicians would like to be eDetailed but have not been asked to do so.

"We would argue that given most companies have several years of experience with electronic detailing they are far beyond just looking at overall adoption rates," said Mark Bard, president of Manhattan Research. "These companies demand to look at the subsegments of electronic detailing users. Who are the low vs. high frequency users? Who is using electronic detailing as a complement to the rep and who is using it as a replacement? In the realm of electronic detailing," Bard said, "the ends of the spectrum may be the most interesting in terms of understanding future growth potential. If you want to deliver relevant initiatives you have to deliver based on the needs of the unique segment."

Mixed Results for ROI

Boehm presented some results of interviews with pharmaceutical companies to gauge how much money they spent on eDetailing, what the return on investment (ROI) was, and what their plans for future eDetailing programs looked like.

The interviews demonstrated that pharma companies are having mixed results with their

eDetailing programs. Half of the respondents said they planned the same number or fewer eDetailing programs for 2005 as they did in 2004. Sixty percent (60%) reported an ROI below 2 times or did not know what the ROI was (those that did not know the ROI planned to decrease the number of eDetails by 75% to 200% between 2004 and 2005).

“While it is critical for companies to determine the appropriate success metrics—which may differ by product team or stage in a product’s life cycle—it is also very important to understand the level of market demand for electronic detailing among physician targets,” said Bard. “If your target audience wants it, there is an inherent risk in making a decision not to offer that as one channel to the market.”

Bard offered some alternative ways to quantify the “success” of a program. “Similar to testing of the success of the detail rep,” he said, “there are numerous metrics that can be applied to the electronic realm (in addition to Rx share shift among targets). Measures of success may include the relevance of the content compared to other sources for product information, message recall (over time), and the convenience of the format (as perceived by the end user).”

Total Spending

The majority (60%) of Forrester interviewees said their companies spent \$3 million or less on eDetailing in 2004. In 2003, Verispan estimated that a total \$212 million was spent on ePromotions to physicians (mostly “virtual details”). This is a small drop in the bucket compared to the approximately \$7 billion that pharma companies spend on traditional detailing each year, not including samples.

Why haven’t pharma companies spent more on eDetailing? There is some evidence that low ROI is not the main reason. Monique Levy, Senior Analyst at Jupiter Research, presented results at a recent Lathian seminar from a survey of pharmaceutical executives that her firm conducted in August 2004. Only 16% of the respondents indicated that “low ROI” was a barrier to increasing spending on eDetailing. However, 61% of execs in the survey wanted proof of ROI.

Perhaps the most important factor influencing the success of eDetailing is continued physician acceptance. To date, a lot of that acceptance has been due to cash and cash-equivalent honoraria offered to physicians for participating in an eDetail.

Cash Honoraria

Perhaps it’s no surprise that cash honoraria is cited by 93% of eDetailed physicians as influencing their decision to accept an eDetail (see FIGURE 1). In fact, 35% of eDetailed physicians cite honoraria of some sort (could be textbooks) as the primary reason for accepting eDetails, according to the 2005 Forrester online survey.

Compare these results to Forrester’s 2003 Technographics® Benchmark Study: 77% of eDetailed docs say honoraria is a reason for participating in eDetails. Forty percent (40%) of eDetailed docs agreed with the statement “I love them [honoraria]! That’s the reason I do eDetails!” and 95% of doctors surveyed said honoraria “are the reason” or “would sway my decision” to participate in an eDetail (see “[Pharma Marketing News eDetailing Supplement](#),” p. 7).

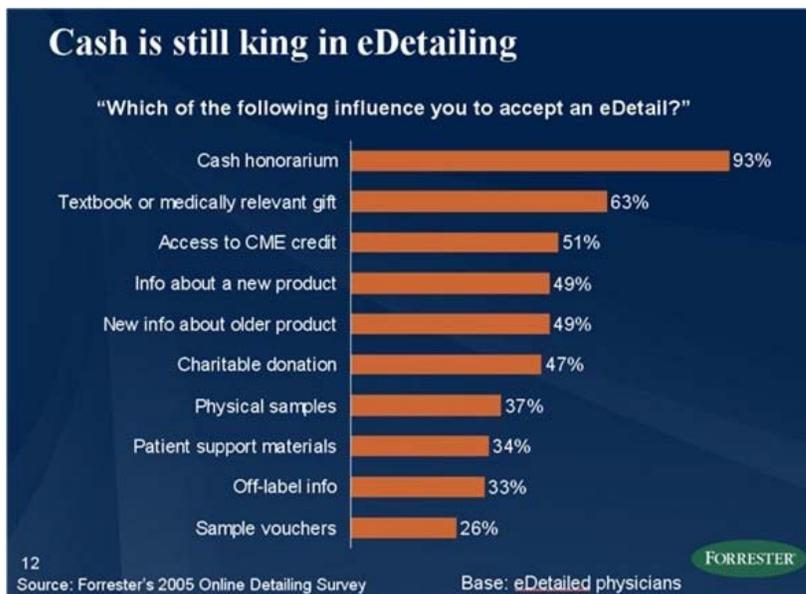


FIGURE 1: ““Which of the following influence you to accept an eDetail?””
Source: Forrester’s 2005 Online Detailing Survey. Base: eDetailed physicians.

It seems that between 2003 and 2005 doctors have become even more conditioned to receive incentives, not less so (93% in 2005 vs. 77% in 2003 cited honoraria as an influencer). Or maybe we should look at the 95% number in 2003 vs. the 93% number in 2005?

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Bard explains why it can be problematic conducting research related to incentives and honoraria: most docs say they need it (to some extent). "We continue to find there are numerous situations where physicians agree the content overrides the demand for an honorarium," said Bard. "Perhaps no surprise is that the timing of the information is one of the strongest predictors of their likelihood to participate without incentive. New product information carries an honorarium of sorts—timely information. The other side of the curve is that you will have to provide significant incentives to convince physicians to participate in electronic details (products in the middle of their life cycle ... or with nothing new to say)."

Nevertheless, most pharmaceutical marketers would like to see physicians moving away from cash and cash-equivalent incentives. OIG compliance guidelines will force pharma companies themselves to take the initiative and limit cash honoraria or eliminate the practice entirely.

eDetailing Actions

In the 2005 online survey (not the AMA study shown in FIGURE 2), Forrester asked eDetailed physicians "Which of the following have you ever done following an eDetail?" A number of calls to action were listed including prescribing more of the featured drug as well as prescribing less of the featured drug. Happily, 49% of eDetailed physicians reported that they prescribed more of the featured drug (data from the 2005 online study are not shown in FIGURE 2). In a similar Forrester online survey completed in 2004, 61% of eDetailed docs said they prescribed more of the featured drug after being eDetailed (see FIGURE 2). By this measure, it seems that eDetailing is becoming less effective in driving new prescriptions, not more.

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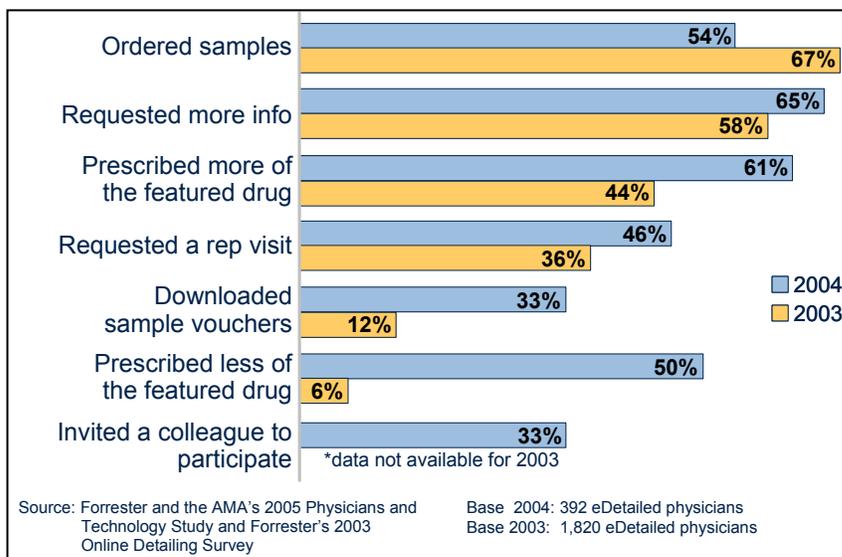


FIGURE 2: "Which of the following have you ever done following an eDetail?"
 Source: Forrester/AMA 2005 Physicians and Technology Study and Forrester's 2003 Online Detailing Survey. Base: eDetailed physicians (2004:392, 2003:1820)

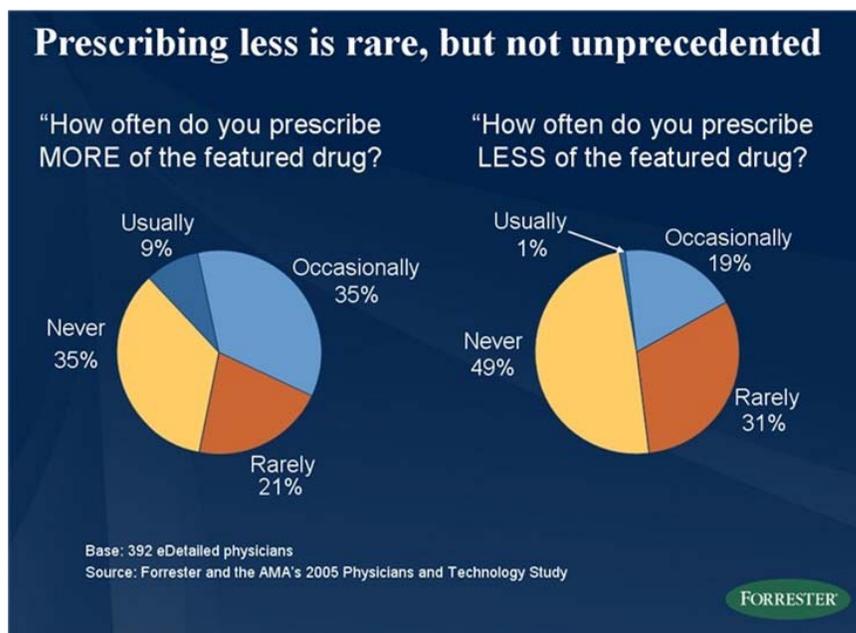


FIGURE 3: "How often do you prescribe MORE (or LESS) of the featured drug?"
 Source: Forrester and the AMA's 2005 Physicians and Technology Study and Forrester's 2003 Online Detailing Survey.

What about the other side of the coin—prescribing less of the featured drug? It appears that a significantly higher percentage of docs prescribed less of the featured drug in 2004 than in 2003 (50% in 2004 vs. 6% in 2003; see FIGURE 2).

Could it be that, as time goes on and more physicians are exposed to eDetailing, a larger percentage of eDetailed docs are prescribing less of the featured product?

It turns out that we may not be comparing apples to apples in the 2003 vs. 2004 data. The 2003 study was done online through eDetailing Vendors, whereas the 2005 study (2004 data) was a mail survey done through the AMA.

The online 2003 survey asked "Which of the following have you ever done following an eDetail?" Respondents had to answer "Yes" or "No". Six percent (6%) of eDetailed physicians in this study answered "Yes" to the question regarding prescribing less of the featured drug.

The AMA study, on the other hand, asked the question in a slightly different way, according to Boehm. It asked "How often have you prescribed less of the featured drug: Never, Rarely, Occasionally, Frequently."

According to Boehm, "when you ask a question that way, you get more granularity." In other words, more respondents are likely to check off "rarely" because maybe they did it once. With the "Yes/No" choice, however, people tend to say "Yes" only if they've done the thing asked more often than they've not done it. Boehm noted that 31% of docs in the AMA study answered "rarely" and these may have answered "No" if the question was asked as in the 2003 online study (see FIGURE 3).

Advocates of eDetailing should be careful when presenting data from these surveys and comparing results from one year to the next in an attempt to illustrate trends. You just might kill the goose before the golden egg is laid!

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Experts Consulted

The following experts were mentioned or consulted in the preparation of this article.

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