



2012

What Physicians Want! Survey

A Publicis Touchpoint Solutions White Paper

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What Physicians Want!

Results of a Sermo Physician Survey

Overview



Sermo is the largest online physician-only community, where over 120,000 practicing physicians collaborate on cases and exchange observations about drugs, devices, and clinical issues.

Welcome to the third edition of *What Physicians Want!*, a biennial survey conducted by Publicis Touchpoint Solutions and Sermo. Since the survey's initiation in 2008, the objectives of the survey have been to measure how well the biopharmaceutical industry is fulfilling physicians' needs and to provide guidance to life sciences executives as they seek to provide better service to these crucial stakeholders going forward.

Like its predecessors, the 2012 *What Physicians Want!* survey provides a snapshot of the degree to which the life sciences industry is fulfilling its value proposition to physicians. Moreover, this paper reports on trends identified by comparing this year's data to that from previous editions. This newest report also includes insight regarding physicians' attitudes on emerging digital and social media trends.

The 2012 *What Physicians Want!* survey questioned more than 250 Sermo physicians. Sixty-two percent of respondents were primary care providers (FP, IM, Ped), while the remaining 38% comprised more than 20 surgical and nonsurgical specialties.



Overarching Message: “Help Me Help My Patients!”

It is one of the beautiful compensations in this life that no one can sincerely try to help another without helping himself.
— Ralph Waldo Emerson

The overarching message of this year’s survey is clear: Physicians are begging for practical help in getting their work done. More than ever before, they want efficient tools and communications that will help them help their patients. They want to strip away time wasters so they can educate patients, support patients who need assistance, and help patients comply and adhere to therapy. They will open their doors to life sciences companies and representatives that help them accomplish these goals.

This sentiment emerges upon close comparison of the results of this year’s survey to those from 2010:

1. **Want still more high-quality sales representatives**

A consistent result in all 3 biennial surveys, HCPs are saying “you are *still* not providing me with the ‘quality’ of representative I need for my practice.”

2. **Want more use of iPads in detailing**

It’s clear that survey respondents appreciate the interactivity of details presented on iPads.

3. **Want more electronic access to materials and representatives**

Physicians want more on-demand resources (disease- and product-focused websites, eSampling, eMail, etc) and after-hours access to local “hybrid” representatives through phone and live video.

4. **Want less mailed print materials**

While a minority finds print materials useful, most HCPs want to receive less.

5. **Want more customer service representatives, hybrid representatives, and clinical health educators**

These types of nontraditional representatives provide tremendous value around service, education, and adherence/retention support.

6. **Want more industry-sponsored accredited CME, but less promotional education**

It is interesting to note that HCPs’ interest in industry-sponsored accredited CME has increased as availability has decreased.

7. **Want more HCP-focused websites**

Eighty-six percent of respondents would like to see more HCP-focused disease-state websites, and 77% want more brand-/product-oriented HCP-focused websites.

8. **88% now own smartphones (vs 70% in 2010), and 54% use iPads (or other tablets) in daily work**

This is not unexpected, but reinforces the importance of the digital mHealth (mobile health) message.

9. **Doctors communicate with patients primarily via phone (70%), eMail (66%), and mail (46%)**

As doctors and patients increasingly interact via eMail, secure electronic transfer of patient education and support materials will become ever more important.

10. **Doctors are seeking crucial industry focus on patient education, support, and adherence**

HCPs need help providing better patient care in an environment that doesn't make it easy for them to do their jobs (eg, time crunches, lack of payment for counseling/educating patients, etc)

Each of these is explained more fully in the detailed results that follow.

1. Personal Promotion: Sales Representatives

*Quality in a service or product is not what you put into it.
It is what the client or customer gets out of it.*

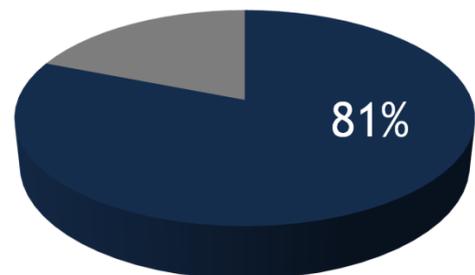
— Peter Drucker

Provide Higher-Quality Representatives

One of the key messages of the original survey (2008) and the 2nd edition (2010) was “Give me ‘better’ representatives!” That message continues to come through loud and clear in the 2012 edition. Physicians clearly respect field sales representatives who are highly trained, experienced, and adept at having clinical discussions that add value to their practices.

While there are significant changes between this year’s responses and those from the 2010 survey, one of the things that has not changed is physicians’ desire for still more “higher-quality” representatives calling on their practices. A full 81% of physicians surveyed stated they wanted “more” or “significantly more” higher-quality representatives, defined as those “who are trained beyond their own product, and prepared for a serious discussion of multiple therapeutic options.”

81% Want “Higher-Quality” Representatives



This response is identical to that in the 2010 survey, and represents a slight improvement from the 2008 edition, in which 85% of respondents noted that they wanted higher-quality representatives. It is clear that physicians still see a need for improvement in the competency of representatives calling on their practices.



“I really do appreciate the interaction between physicians and pharmaceutical reps, but have found too often that the reps I have interacted with have a very limited scope of knowledge. I find that I'm much more willing to take a rep seriously if they can keep up in a discussion that is related to my field but beyond the scope of their individual product.”

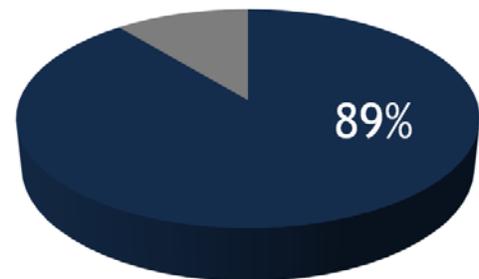
— Survey respondent

Focus on the Science

Physicians are hungry for clinical conversations with life sciences representatives that are based on clinical studies and evidence-based medicine (EBM). Nearly 9 of 10 physicians surveyed (89%) want representatives to make more use of clinical studies and EBM in their conversations. Again, this response is identical to that of the 2010 survey.

Training and empowering representatives to actively use clinical studies in their conversations with physicians is a multidepartmental issue. Training, of course, plays a critical role. Representatives with expertise in using clinical studies have a strong understanding of the science—including the disease state, therapeutic options, research methodology, statistics, etc. Likewise, representatives who successfully employ clinical studies also are adept at using a high-science sales approach that seamlessly incorporates clinical study results into a dialog to address specific issues concerning each individual physician's practice.

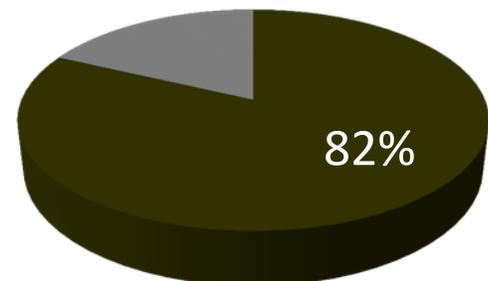
89% Want More Use of Clinical Studies & EBM



Employ More iPads in Physician Conversations

Field representatives are increasingly using iPads as their eVisual aid platform in their conversations with physicians. iPads are a clear hit with doctors; 82% of survey respondents want to see “more” or “significantly more” use of iPads or other tablets by representatives calling on their practices. This is a significant increase from the 2010 survey, when 64% wanted more iPad/tablet use. Conversely, only 38% of physicians want representatives to increase use of traditional print visual aids.

82% Want More Use of iPads



[Representatives should] *“have a practical and realistic knowledge of their product's placement in the rank of competing products (cost-effectiveness; formulary restrictions; safety profile).”*

— Survey respondent

2. “Types” of Representatives

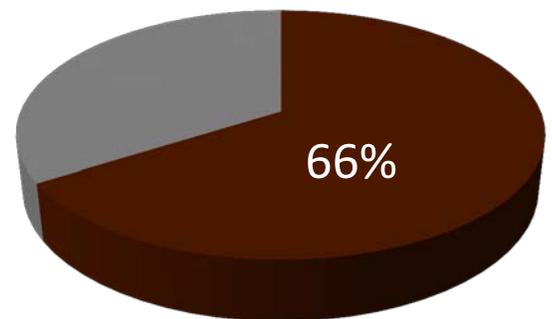
A satisfied customer is the best business strategy of all.

— Michael LeBoeuf

Specialty Representatives

For many years, the biopharma business model relied primarily on large armies of traditional sales representatives. However, this model is rapidly changing as nontraditional and clinical representatives gain favor with physicians. In keeping with their requests for “higher-quality” representatives—and despite increasing daily time pressures—66% of respondents to this survey would like to have “more” or “significantly more” calls from specialty representatives. This preference is consistent with the 2008 and 2010 surveys. In contrast, only about half of respondents (49%) want more visits from traditional primary care representatives.

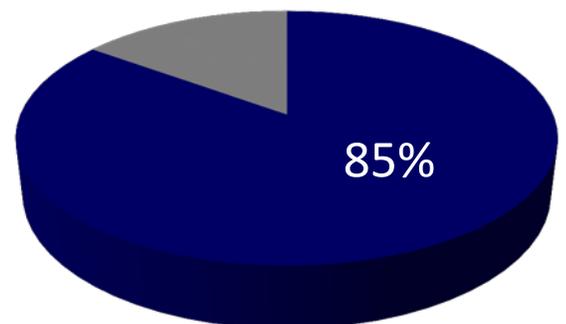
66% Want More Specialty Representatives



Customer Service Representatives

Customer service representatives (CSRs) were preferred as well, with an astounding 85% of respondents saying they want to see more of these nontraditional representatives. Customer service representatives are defined as representatives who do not “sell,” but instead work with physicians’ practices to provide services, such as patient literature, samples, etc. This is a substantial increase compared with the 2010 survey, in which 75% of respondents stated that they wanted more customer service representatives. There is no doubt that the services provided by CSRs are becoming more and more important to practicing HCPs.

85% Want More Customer Service Representatives



[To help my practice, pharma could] “provide information on disease states concerning such topics as diagnostic criteria, treatment guidelines, when to refer to a specialist, etc. Information to give to patients concerning disease and injury treatment [is] also appreciated.”

— Survey respondent

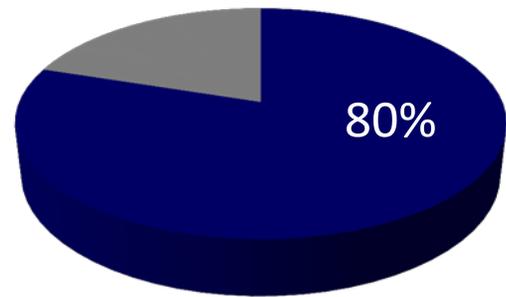
“Clinical Health Educators and Medical Science Liaisons would add tremendous value to my practice. This would aid in educating myself, my patients and colleagues.”

— Survey respondent

Clinical Health Educators

Clinical health educators (CHEs)—credentialed healthcare professionals who work with physicians and/or patients to improve health outcomes—are also preferred by the physicians surveyed. While CHEs are often nurses, other allied health professionals (eg, nutritionists, diabetes educators, etc) could play this role, depending on what disease states they are supporting. Eighty percent of physicians stated that they wanted “more” or “significantly more” CHEs working with their practices. This is a slight increase from the previous survey, in which 75% stated an interest in more CHEs.

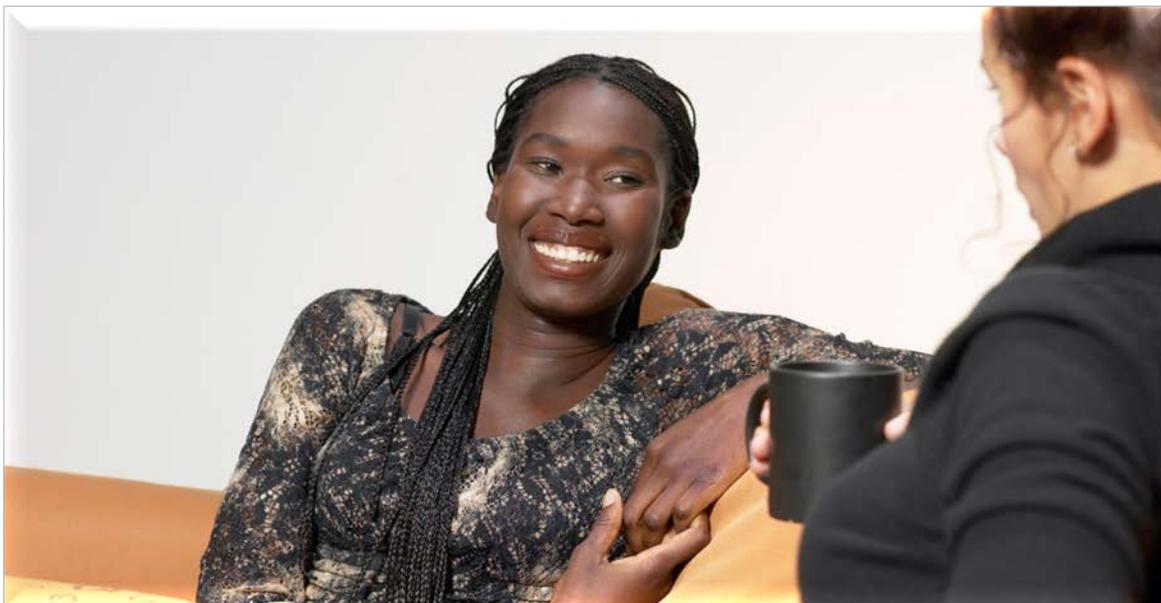
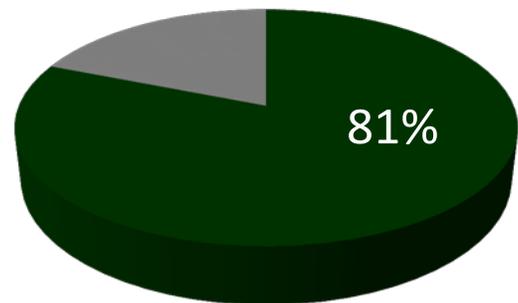
80% Want More Clinical Health Educators



Medical Science Liaisons

Medical science liaisons (MSLs) are not new to biopharma and generally work with academic physicians and healthcare professionals involved in clinical trials. While the survey did not ask which respondents’ practices would be or should be covered by MSLs, 81% stated that they would like to have “more” or “significantly more” MSLs calling on their practices.

81% Want More Medical Science Liaisons



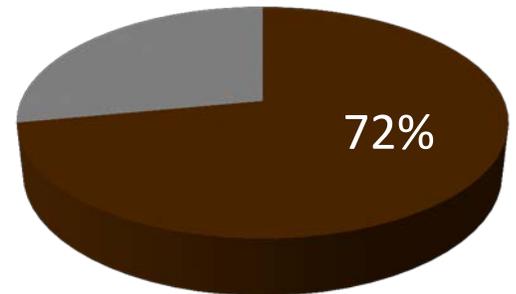
[When I think of successful sales representatives] *“professionalism is essential. Representatives are not simply salespeople, but active members in patient care.”*

— Survey respondent

“Hybrid” Sales Representatives

One of the emerging sales models is the "hybrid" sales representative. Hybrid representatives have defined geographic territories and specific sets of target HCPs, just like typical field representatives. But they reach their physicians through a variety of channels (eg, face-to-face, phone, and video) and at times (eg, work day, after hours, weekends) that are preferred and most convenient for each physician. This model is proving to be very popular with physicians; 72% of survey respondents want “more” or “significantly more” hybrid representatives calling on them.

72% Want More Hybrid Representatives



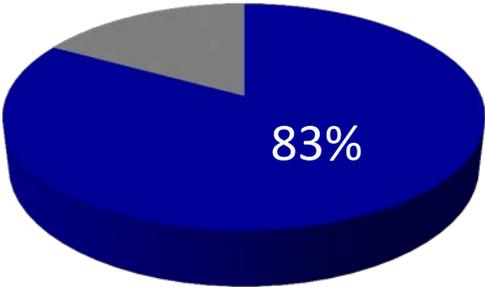
3. Alternative Communication Modes

The art of medicine cannot be inherited, nor can it be copied from books.
— Paracelsus

Industry-Sponsored Accredited CME

Even with the increasing scrutiny on (and decreased amount of) industry-sponsored accredited continuing medical education (CME), 83% of HCPs want to see more (an increase from 76% in 2010). It's clear that these HCPs have a continuing need for unbiased, *accredited* education. These same physicians are far less receptive to industry-sponsored *promotional* education; only 41% want "more" or "significantly more" promotional, on-label industry-sponsored educational programming.

83% Want More Industry-Sponsored Accredited CME

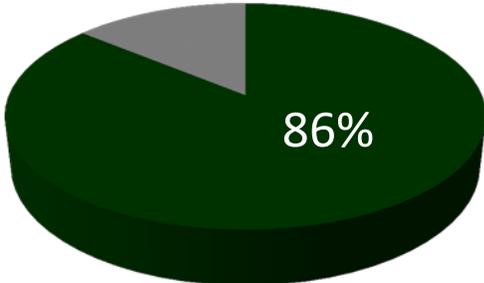


Industry Websites

Interestingly, surveyed physicians expressed significant interest in both more *disease-state* websites and more *product* websites designed specifically for healthcare professionals.

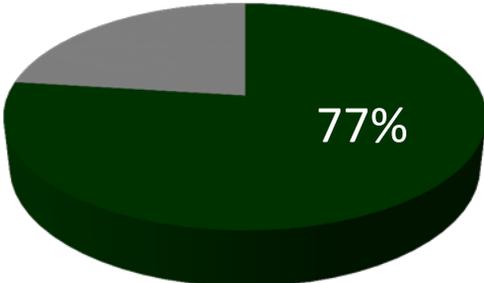
Disease-State Websites

86% Want More HCP-Focused Disease-State Websites



Product Websites

77% Want More HCP-Focused Product Websites



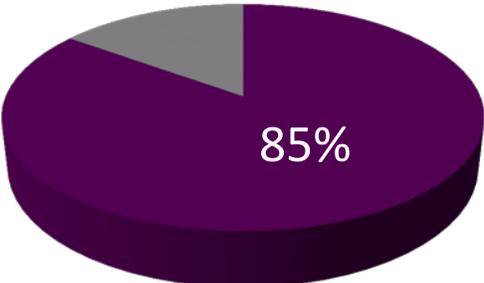
An overwhelming 86% want “more” or “significantly more” disease-state websites designed specifically for healthcare professionals. Importantly, 77% want “more” or “significantly more” product websites geared toward healthcare professionals.

Despite the seeming plethora of industry websites, physicians still see a shortfall in the types of sites they would like to access. While product websites are more numerous than disease-state websites, physicians want more sites that are specifically designed for the needs of healthcare professionals. This sentiment is a clear reflection of HCPs’ desire for on-demand access to resources that can help them manage their time and help their patients.

eSampling

Physicians continue to be enthusiastic about eSampling. Eighty-five percent of respondents want “more” or “significantly more” availability of eSampling, defined as requesting samples via the Internet and receiving them by mail. Although not as popular as eSampling, a majority of respondents (58%) want more teleSampling (inside service representatives offering samples via the phone that physicians also receive by mail).

85% Want More eSampling Availability

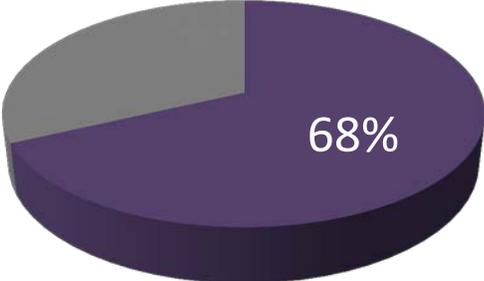


eMail

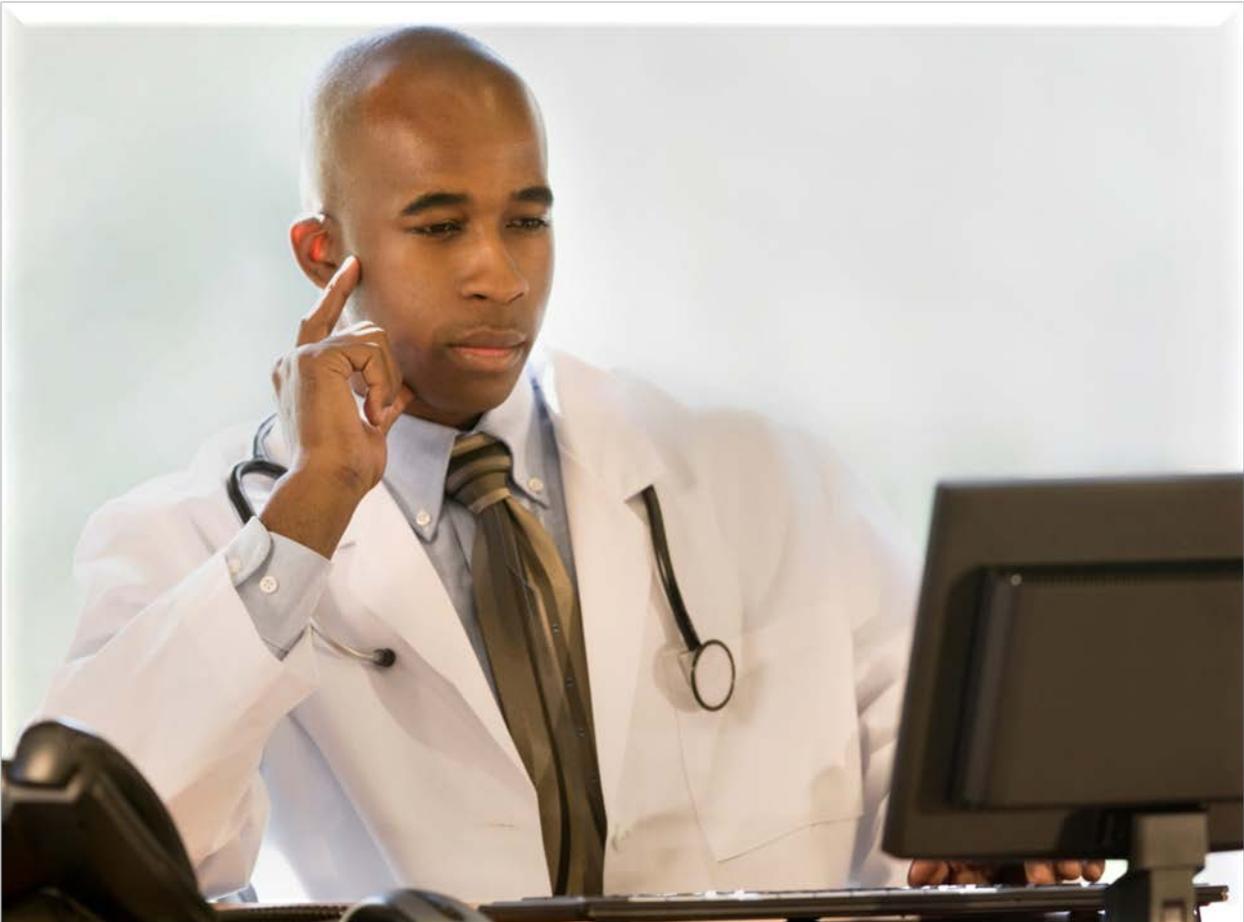
Physicians want more use of eMail when it addresses issues of interest to them (eg, disease state information, practice issues, etc). Sixty-eight percent of physicians wanted “more” or “significantly more” use of eMail to cover topics of interest.

About half of the 2012 respondents want more use of teleDetailing and live video detailing, while less than 4 in 10 want more direct mail (even when related to a topic of interest).

68% Want More eMail About Topics of Interest



“I prefer electronic communication that I can retrieve any time I have a minute or two during the day.”
— Survey respondent



4. Technology

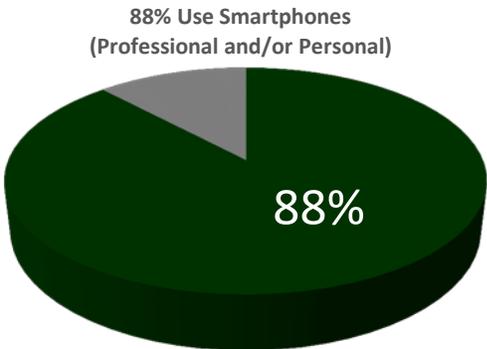
Computers themselves, and software yet to be developed, will revolutionize the way we learn.

— Steve Jobs

Physicians are increasingly embracing digital offerings. As this year’s survey shows, more and more physicians are relying on digital communications in both their personal and professional lives. While interpreting the results that follow, it is important to note that this survey was conducted with *active Sermo participants*; accordingly, the survey responses may reflect higher-than-average levels of digital interaction.

Smartphone Use

Physicians are rapidly embracing mobile technology. Currently, 88% of respondents are using smartphones for personal and/or professional use, a dramatic increase from the 70% in the 2010 survey. Of the 12% who do not currently use mobile devices, three-quarters plan to use smartphones for personal and/or professional use in the near future.



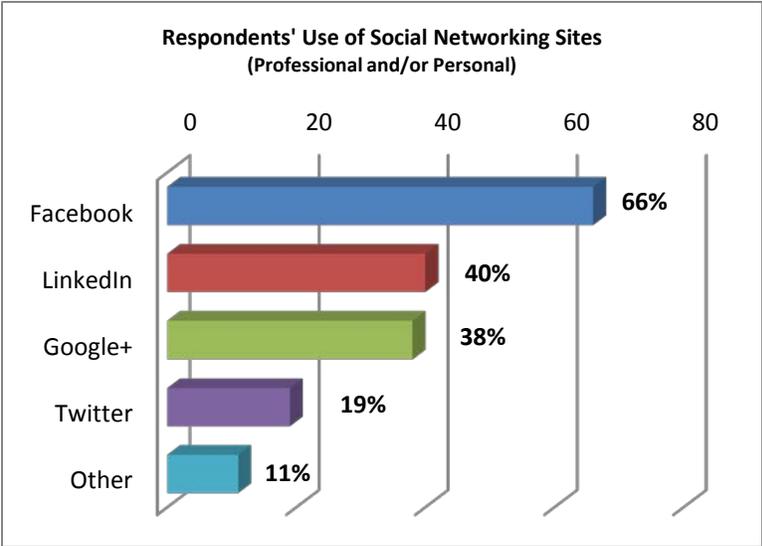
iPad Use

iPads and other tablets are quickly becoming a physician favorite. As noted earlier, 82% of survey respondents want to see “more” or “significantly more” use of iPads or other tablets by representatives calling on their practices. But HCPs want to own and use their own iPads/tablets, too. In the current survey, over half of the respondents (54%) are using iPads/tablets for personal and/or professional use. And of the 46% who don’t yet use tablets, nearly three-quarters plan to use one for personal and/or professional use in the near future.



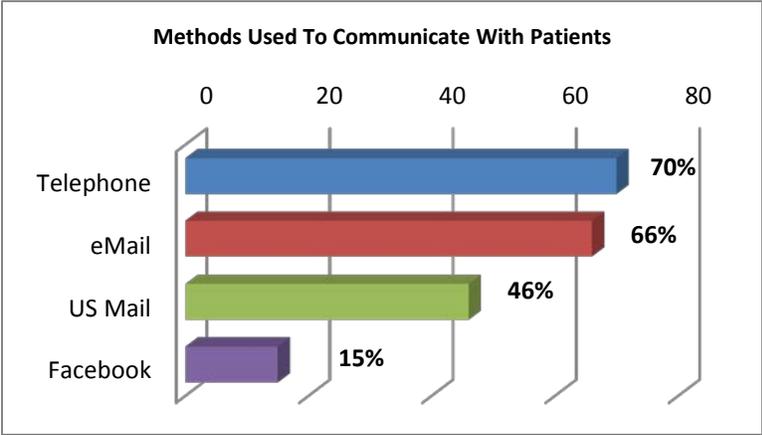
Social Networking Sites

In view of the fact that this survey was completed only by Sermo physicians, it's obvious that 100% of respondents use Sermo. However, these physicians are also active in other social networks. Facebook is the leading nonmedical social networking site for these physicians, with 66% active (vs 68% in 2010). LinkedIn showed rapid growth in users, from 18% in 2010 to 40% in this year's survey. Google+ is surging quickly, with 38% using this site. Twitter uptake has remained relatively flat, with 19% use in 2012 vs 22% in 2010. "Other" social sites mentioned include QuantiaMD, Medscape, and others.



Communicating With Patients

This year's survey included a new question regarding the communication channels physicians use (or plan to use in the near future) *to communicate with their patients*. The most commonly used methods are phone (70%) and eMail (66%), with just 46% now using US mail. Interestingly, 15% of respondents are using Facebook to communicate with their patients. Other methods (each used by less than 10% of HCPs) include LinkedIn, WebEx (or other video services), Google+, and Twitter.



5. Value-Added Services

Price is what you pay. Value is what you get.

— Warren Buffett

The 2012 *What Physicians Want!* survey included an important open-ended question intended to get to the heart of what physicians want and need from pharmaceutical manufacturers: **“In your practice, what are the day-to-day challenges life sciences companies could help you solve?”** The vast majority of survey participants took the time to respond to this vital query, and the results are poignant.

Perhaps unsurprisingly, the most common response focuses on helping patients afford the medicines they need. But these were not pointed calls for industry to “cut prices.” On the contrary, the vast majority of HCPs are suggesting positive steps the industry can take to help specific patients gain access:

- ✓ *“Getting patients who can't afford medication signed up for a sample program or discounted meds”*
- ✓ *“More info on reimbursements”*
- ✓ *“Identify patient support mechanisms to allow treatment without undue financial burden”*
- ✓ *“More accurate coverage information and help with prior authorizations”*
- ✓ *“Formulary, samples, coupons—anything that helps the patient financially”*
- ✓ *“Insurance coverage and finding out if certain patients are covered and being a liaison between the patients and nurses”*



Another common theme has to do with helping doctors educate their patients more effectively and efficiently:

- ✓ *“Patient education regarding compliance/drug interactions”*
- ✓ *“Perhaps there might be patient materials that I could make available to my patients online”*
- ✓ *“Patient education through interactive apps. Patients do not remember the information we give them during the visit and do not read informational handouts. If we could give them a free app, it would be more useful to them.”*
- ✓ *“More integration of meds with treatment support; for example, counseling for weight loss drugs, lipid reduction diet techniques for statins, etc. Some of [these] are now being offered, but [we] need more.”*

Finally, physicians continue to request more—and more efficient—education for themselves and their staffs:

- ✓ *“Simple electronic dosing calculators. Perhaps in the form of smartphone applications?”*
- ✓ *“Providing information on disease states concerning such topics as diagnostic criteria, treatment guidelines, when to refer to a specialist, etc.”*
- ✓ *“Time is really the biggest challenge in primary care—if they could continue to provide patient material and resources that are easy to access and high quality, that's the best thing.”*
- ✓ *“I need to have more case studies so I know exactly when to use the meds.”*

Taken together, the message from these physicians is clear. They:

- (1) Recognize the tremendous value the life sciences industry provides to the US healthcare system,
- (2) Appreciate all the tools the industry provides that help patients gain access to branded medications—samples, co-pay coupons and vouchers, support with formularies and prior authorizations, etc—and need help to understand and use them properly, and
- (3) Continue to need effective and easy-to-access tools for HCPs, staff, and patients.



Where Do We Go From Here? Key “Take-Aways”...

“Help Me Help My Patients!”

Physicians are begging for practical help in providing better healthcare for their patients. More than ever before, they want efficient tools and communications that will help them help their patients. They want to strip away time wasters so they can educate patients, support patients who need assistance, and help patients comply and adhere to therapy. They will open doors to representatives that help them accomplish these goals.

Sales Representative “Quality”

There is still a need for significant improvement in the “quality” of sales representatives as a whole. Physicians want representatives with better education and training, a more experienced and consultative approach, and a high comfort level when using clinical studies and evidence-based medicine. Moreover, the biopharma industry should deploy representatives that can focus on the science (rather than on memorized selling points) and should use more interactive technology in their interactions with clinicians.

Nontraditional and “Hybrid” Representatives

To help them accomplish their patient treatment goals, physicians express specific interest in seeing more specialty representatives, customer service representatives, medical science liaisons, clinical health educators, and “hybrid” representatives (who have a defined geographic territory and reach their physicians via face-to-face, phone, and video, and can interact during normal work hours, after hours, or weekends).

Technology is Leading the Way to the Future

Physicians are rapidly and eagerly embracing digital media, expressing positive ratings for:

- Representatives using iPads and other tablets (82% want more use of this tool)
- Disease-state websites designed specifically for healthcare professionals (86% want more)
- Product websites designed for healthcare professionals (77% want more of these sites)
- eSampling (85% request more use of eSampling sites)
- eMail communications on topics of interest (68% stating they wanted more of this)
- Smartphones (88% using) and iPads/tablets (54% using)
- Social networking (66% using Facebook) and digital communication with patients (66% using eMail)

It is clear that the life sciences industry has moved beyond the “3-point detail and a firm close.” Today, the focus is on providing a highly customized, multichannel communication mix for HCPs comprising traditional sales representatives, specialty teams, customer service representatives, clinical health educators, and medical science liaisons, as well as inside sales and service teams. More important, healthcare communicators must assist doctors as they educate patients, support patients who need assistance, and help patients comply and adhere to therapy. Doctors will reward companies and representatives that help them accomplish these goals.



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