

What does the future hold for

DETAILING

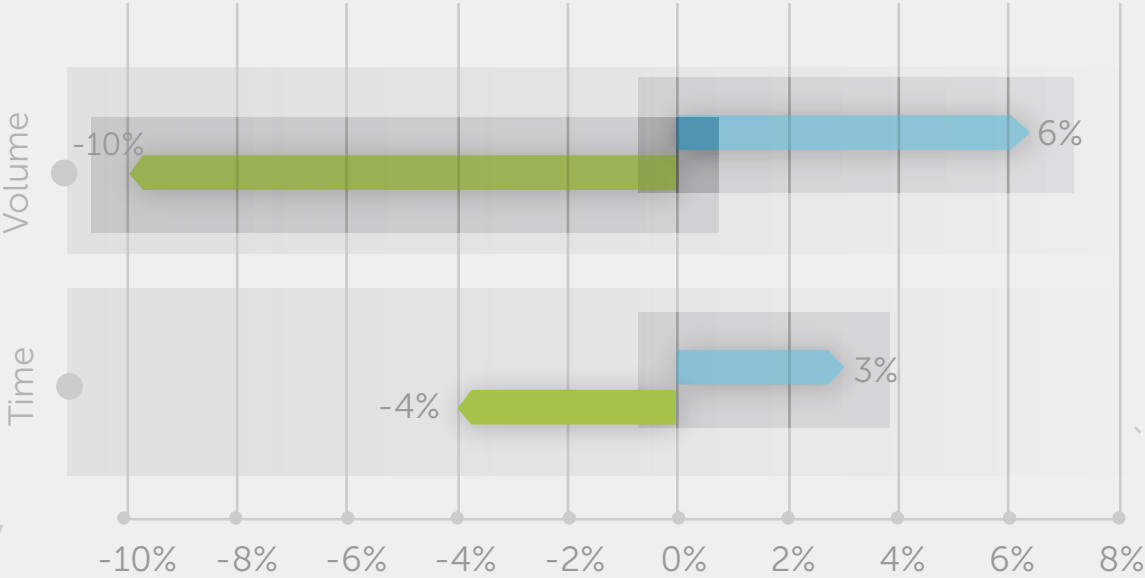
and drug reps?

CHANGING MARKET

As is the case with many industries, the use of technology has replaced in-person interaction within the medical field. While the US deploys almost 80,000 pharmaceutical Medical Representatives (MRs), that number has decreased 12% since last year. Call centers, tablets, and electronic, web-based product detailing are meeting the needs of these now-eliminated positions. In the US, all top 20 pharma companies use e-detailing. What impact will that have on the future of drug detailing?

Change in Detail Time & Volume, Last 2 Years

● In-person ● Electronic



17%

of Physicians prefer
traditional contact
from sales reps

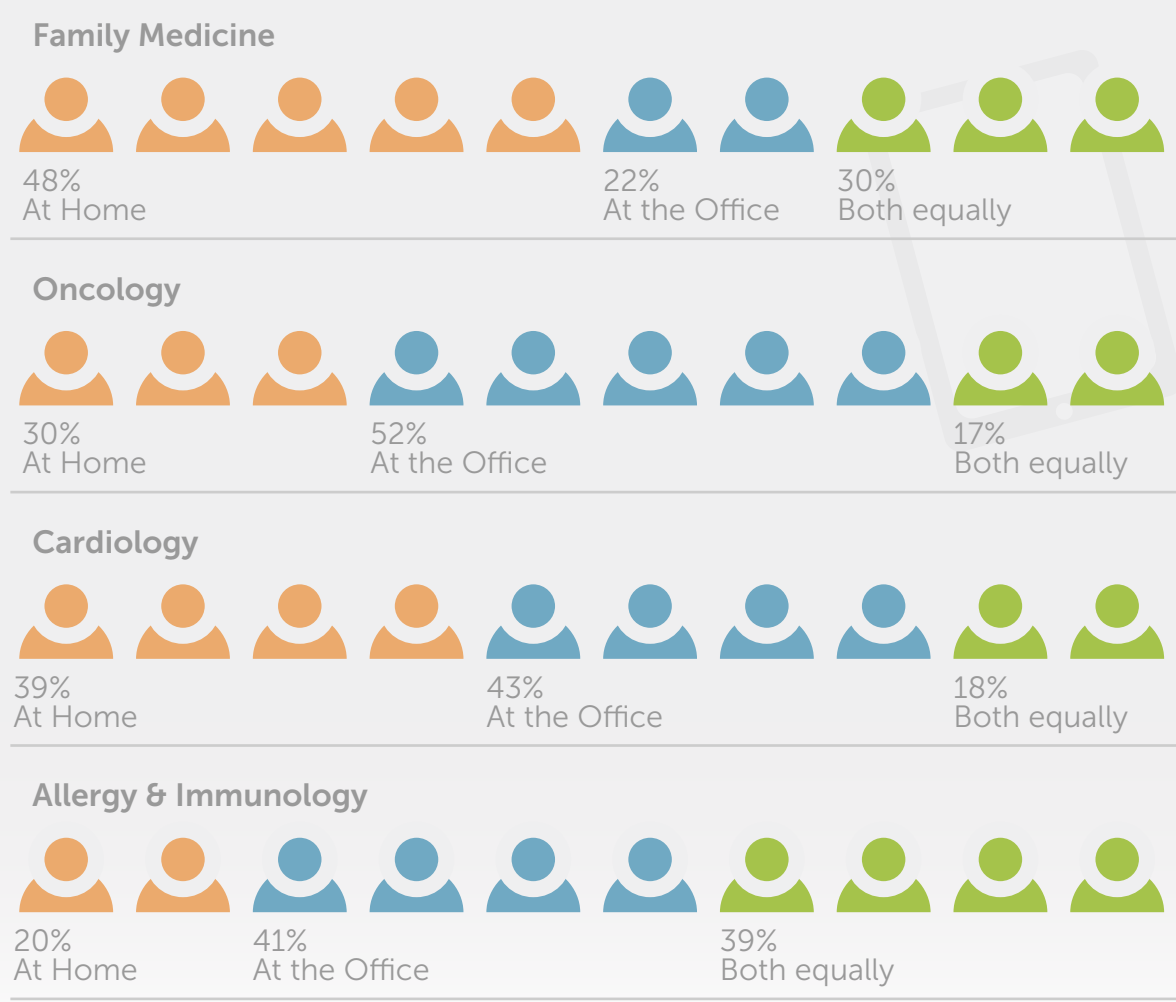
43%

of Physicians
favor e-detailing

50%

of Physicians limit
detailing in some
way

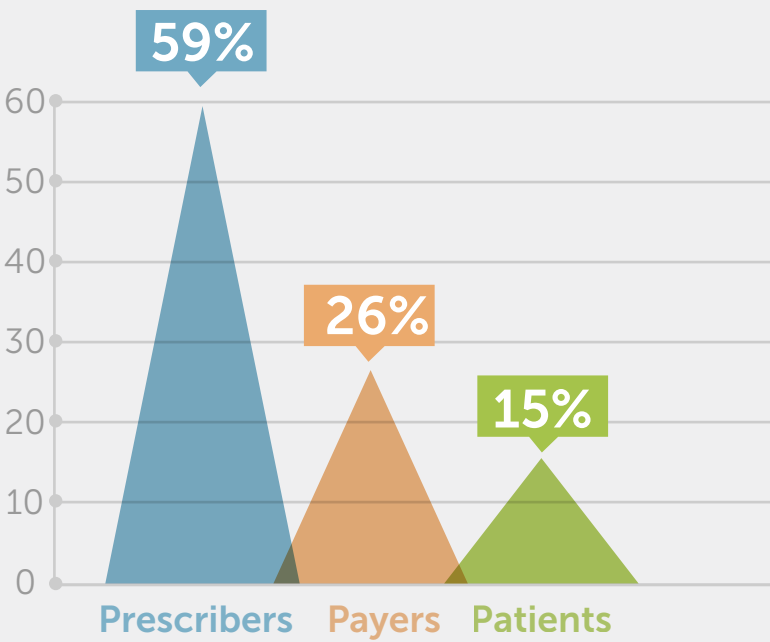
Location of Time Spent on Electronic Product Detailing



PRESCRIBERS' NEEDS

Physicians' Ideal Allocation of Marketing Spend

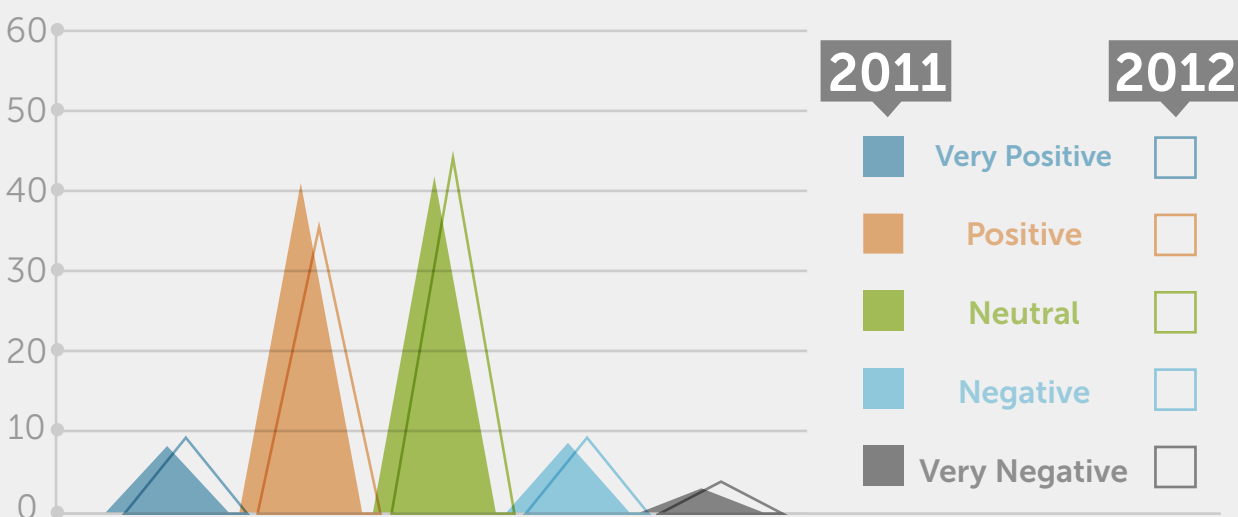
ISR's research placed the prescriber in the position of the drug company and asked them how they would allocate their sales and marketing spend among the three primary constituents: Patients, Prescribers, and Payers.



See the breakdown by specialty in ISR's *Electronic vs. In-person Detailing: A Head-to-Head Comparison of Time, Volume, Value, and Outcomes*

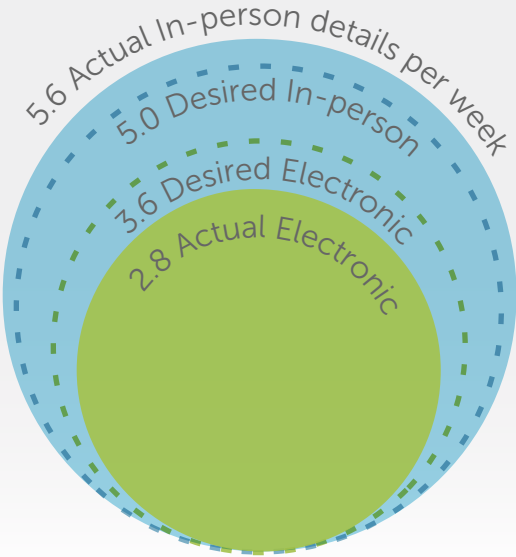
Physician Attitudes Toward E-Detailing

Physicians' attitudes toward e-detailing have remained fairly stable over the past year.



Desired vs. Actual Number of Details Per Week

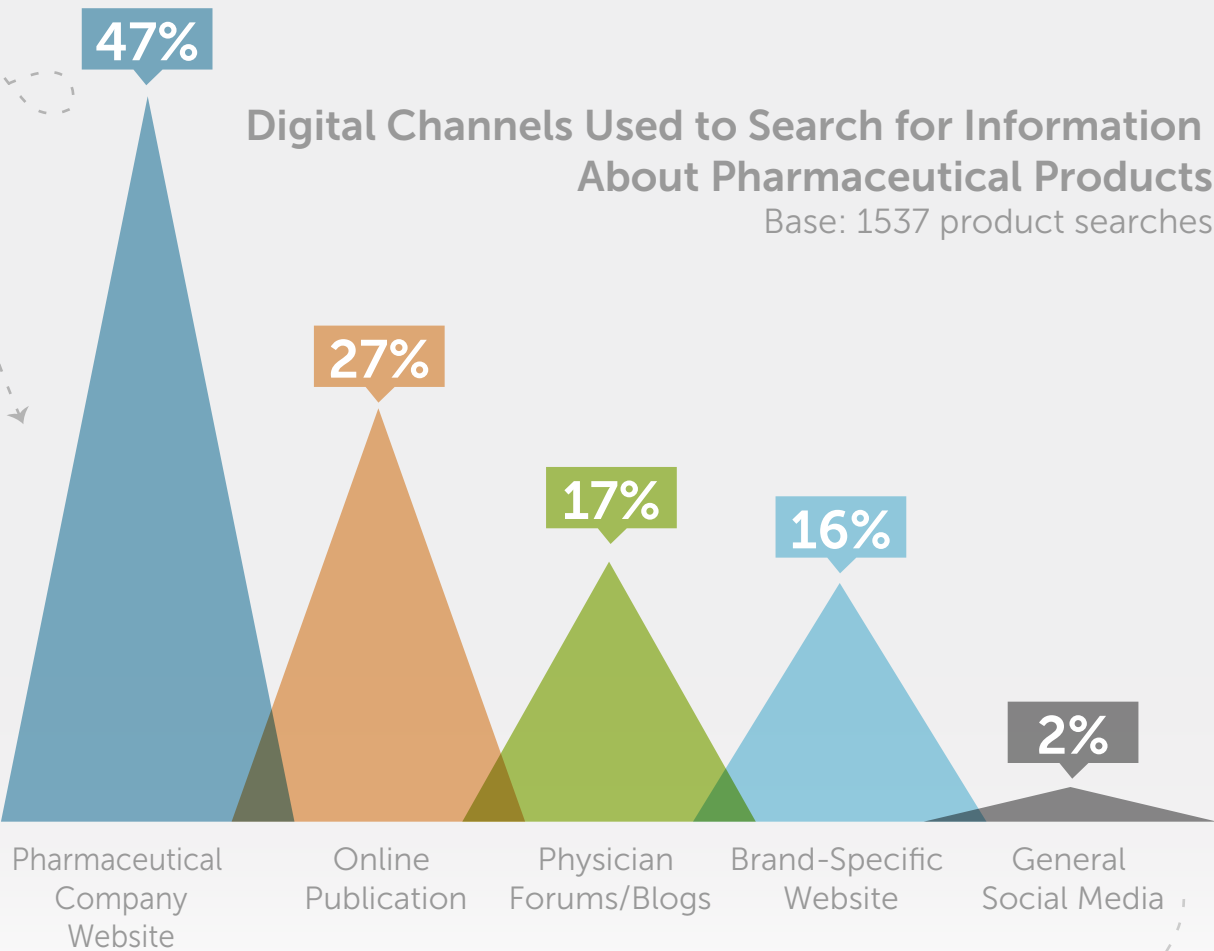
See the breakdown by specialty and average prescriber satisfaction with electronic and in-person detailing in ISR's *Electronic vs. In-person Detailing: A Head-to-Head Comparison of Time, Volume, Value, and Outcomes*



PRESCRIBERS' HABITS

Top 5 Things Physicians Are Doing on their Tablets and Smartphones

1. SEND AND RECEIVE EMAILS (65%)
2. USE APPS (51%)
3. INSTANT MESSAGING (50%)
4. RESEARCHING INFORMATION ABOUT MEDICATIONS (35%)
5. COMMUNICATING WITH OTHER PHYSICIANS (32%)



NEXT STEPS

Many pharma executives think that physicians will have less time for their marketing efforts and as a result, product detailing might shift from physicians to key accounts, payers, and hospitals.

68% of Pharma Executives believe that the current pharmaceutical detailing model is broken.

The take-away for drug marketers: Ensure your technology is smart, targeted, and meets the needs of prescribers.

Download a free preview of ISR's *Electronic vs. In-person Detailing: A Head-to-Head Comparison of Time, Volume, Value and Outcomes* to learn more,

SOURCES

ISR's Primary Research

ISR's *Electronic vs. In-person Detailing: A Head-to-Head Comparison of Time, Volume, Value, and Outcomes* Report

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