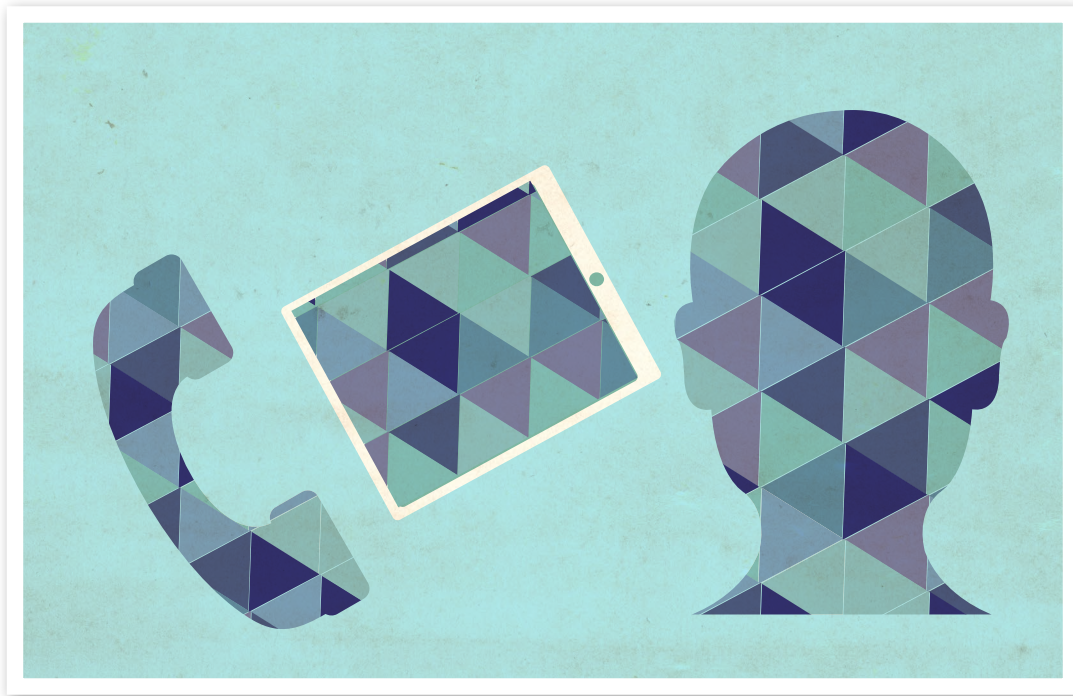


PREVIEW



Pharmaceutical Detailing: In-Person vs. Electronic vs. Phone



Report Overview

Product detailing has seen a tremendous shift in the past few years, as web-based technologies have started to replace face-to-face detail sessions. This report analyzes physicians' experiences with electronic, in-person, and live guided telephone detail sessions, comparing volume, time, value, and outcomes. Building on data collected two years ago in ISR's *Adoption and Use of eDetailing vs. In-Person Detailing (2012)*, this new edition explores physicians' concerns with eDetailing and the decline in face-to-face interaction and provides an updated look at the future of product detailing.

333Charts and
Graphs**5**Therapeutic
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Report Structure:

- 1. Executive Summary**
 - Detail Activity
 - Reasons for Decrease in Details
 - Usefulness of Product Information
 - Satisfaction with Product Details
 - Most Beneficial Detail Type by Product Stage
 - Comparison of Detail Types for Learning and Information Experience
- 2. Specialty Summaries**
- 3. Cardiology Specialty Section**
- 4. CNS/Neurology Specialty Section**
- 5. Oncology Specialty Section**
- 6. Primary Care Specialty Section**
- 7. Respiratory/Pulmonology Specialty Section**
- 8. Comparison Across all Specialties**

Methodology:

ISR conducted 20-minute web-based surveys with 173 U.S.-based, board-certified physicians. Respondents have an average of 17 years of experience and see an average of 105 patients per week.

- Cardiology prescribers: 30
- CNS/Neurology prescribers: 32
- Oncology prescribers: 32
- Primary Care prescribers: 48
- Respiratory/Pulmonology prescribers: 31

What you will learn in this report:

- Needs and expectations for product detail sessions
- The degree to which those needs are met by each detail type
- Perspectives on the types of products appropriate for each detail type
- The volume of detail sessions physicians actually participate in per week by detail type as well as their desired volume of details
- The change in number of details as well as in the length of details over the past two years
- Overall value of and satisfaction with each detail type

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CNS/Neurology

Oncology

Primary Care

Respiratory/Pulmonology

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Average Number of Detail Requests

Average Number of Details Participated In

Average Change in Detail Volume

Reasons for Detail Decrease

Reasonable Number of Product Details

Opinion on Number of Details

Average Length of Detail

Average Change in Detail Length

Usefulness of Product Information

Satisfaction with Product Details

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Best Features of Electronic Detailing and Telephone Detailing

Product Knowledge after Detail

Satisfaction with Opportunity to Ask Questions

Patient-focused Information Received from Detail

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Office Type

Specialty Certified

Years in Practice

Number of Patients per Week

Frequency of Representative Interactions

Restrictions on Representative Visits

Office Location

Practice Setting

Number of Physicians at Practice

Number of PAs and NPs at Practice

Age

CNS/Neurology Specialty Section

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Office Type

Specialty Certified

Years in Practice

Number of Patients per Week

Frequency of Representative Interaction

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Office Location

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Number of PAs and NPs at Practice

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Primary Care Specialty Section

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 Number of PAs and NPs at Practice
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About Industry Standard Research

Sample Page

Introduction

act with confidence



Introduction

Industry Standard Research released its first report on pharmaceutical detailing two years ago. The purpose of this report was to understand the effect of the thousands of sales representative layoffs in the pharma industry and how these positions were being replaced through the use of technology. In this research, ISR compared physicians' experiences with electronic and in-person detail sessions, finding that, in its early stages, electronic detailing seemed more convenient and perhaps exciting as a novel way of detailing. The volume of in-person details had declined across specialties and, for about half of physicians, was offset by comparable increases in electronic details.

Unsurprisingly, what was in process of implementation two years ago is still very much in motion today. Electronic, web-based product detailing and tablet computers are now standard methods of detailing. Though physicians recognize and, for the most part, respect these new forms of detailing, they largely do not support them as an overall replacement for face-to-face time with sales representatives. Whether electronic detailing will eventually be deemed an acceptable replacement for in-person visits remains to be seen.

Physicians have two main concerns about the decline in seeing representatives: (1) the lack of product samples and (2) being less informed about products, new products in particular. Some physicians are so concerned about the above that they report not prescribing a product if there is not a sales representative associated with it.

The focus of this report is comparing and contrasting not only physicians' experiences with electronic and in-person detail sessions but also examining live, guided telephone detail sessions. ISR analyzes data across five major medical specialties: Cardiology, CNS/ Neurology, Oncology, Primary Care, and Respiratory/ Pulmonology.

Sample Page

Executive Summary

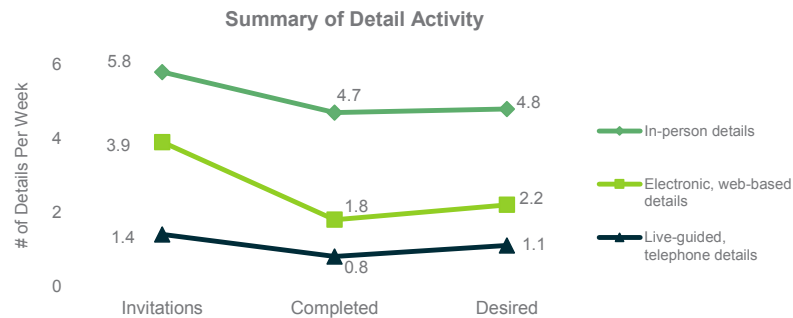
act with confidence



Detail Activity

Physicians report receiving more requests for and participating in more in-person details than electronic or phone details. On average, physicians participate in approximately 5 in-person details per week compared to 2 electronic details and 1 telephone detail.

However, compared to two years ago, physicians have noted a decrease in the number of in-person details while the volume of electronic details has increased. This finding holds true for each of the specialties in this report. Though physicians prefer in-person details, cost and efficiency trade-offs, both for physicians and for pharma, are considerable benefits of alternative types of detailing and will be major determinants in whether the industry will see a continued decline of in-person details and rise in alternative forms of detailing.



Sample Page

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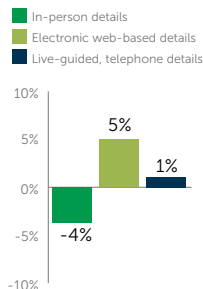


Sample Therapeutic Area Profile

Average Detail Time:



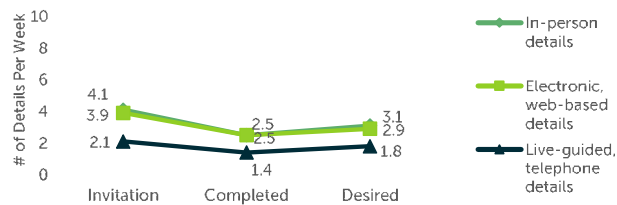
Average Change in Detail Volume



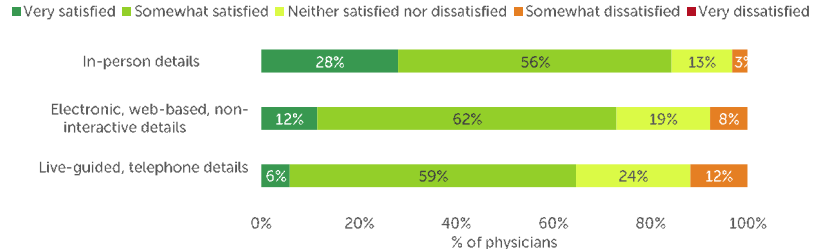
Most Important Attributes for Product Detailing

1. The information is backed up with sufficient supporting data from independent sources
2. The information includes clinical trial data
3. The information is patient-focused

Summary of Detail Activity

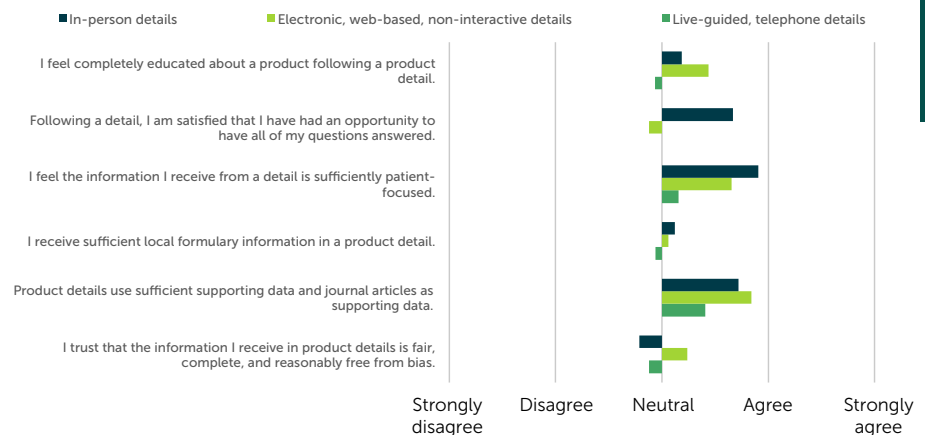


Satisfaction with Details



Comparison of Detail Types for Learning and Information Experience

"Please rate the degree to which you agree or disagree with the following statements:"



Sample Page

Oncology

act with confidence



Satisfaction with Supporting Data and Articles within Detail

"Please rate the degree to which you agree or disagree with the following statements:"
(Base = 32)

☐ Strongly agree
 ☐ Agree
 ☐ Neither agree nor disagree
 ☐ Disagree
 ☐ Strongly disagree

In-person product details use sufficient supporting data and journal articles as supporting data.



Electronic product details use sufficient supporting data and journal articles as supporting data.

Live, guided, telephone-based product details use sufficient supporting data and journal articles as supporting data.

0% 20% 40% 60% 80% 100%
% of physicians

Data available in full report

Trusting Information from Detail

"Please rate the degree to which you agree or disagree with the following statements:"
(Base = 32)

☐ Strongly agree
 ☐ Agree
 ☐ Neither agree nor disagree
 ☐ Disagree
 ☐ Strongly disagree

I trust that the information I receive in in-person product details is fair, complete, and reasonably free from bias.



I trust that the information I receive in electronic product details is fair, complete, and reasonably free from bias.

I trust that the information I receive in live, guided, telephone-based product details is fair, complete, and reasonably free from bias.

0% 20% 40% 60% 80% 100%
% of physicians

Data available in full report

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