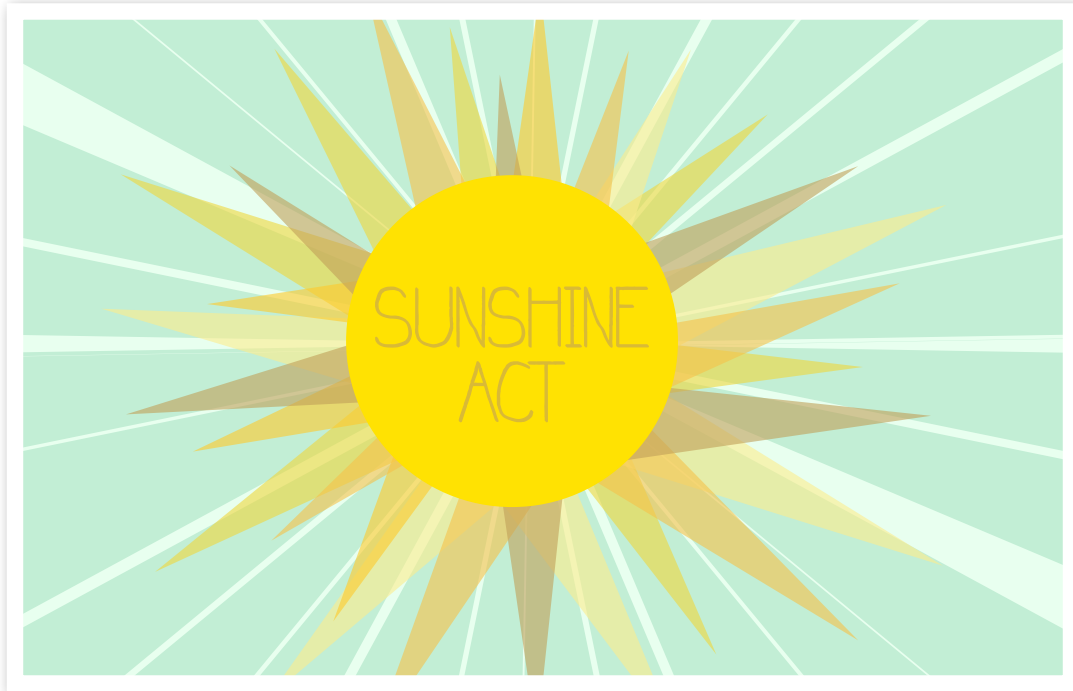


PREVIEW



The Sunshine Act: Impact on US Physician Behavior



Report Overview

The Sunshine Act has been finalized. The data have been (and are being) collected. The figures are being tallied. The key question for pharma is, and may be for some time, "How significant is this impact?"

In this report, ISR asks physicians across five specialties (Cardiology, CNS / Neurology, Oncology, Primary Care, Respiratory / Pulmonology) to assess the impact that the Sunshine Act has had on their practice now that it has been implemented. Building on data collected two years ago in ISR's *The Sunshine Act: Pharma Impact – Changes in US Physician Behavior*, this new edition explores physicians' evolving concerns with the Sunshine Act.

260

Charts and
Graphs

5

Therapeutic
Areas

201

Pages

Report Structure:

1. Executive Summary
2. Specialty Profiles
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:

- How participation in various interactions with pharma has changed since implementation of the Sunshine Act
- Rationale for why the Sunshine Act is negatively impacting some practices
- The most valuable and effective channels of information
- Preferred delivery methods for different types of information
- Which pharmaceutical companies have the most effective sales teams and which have the best online / e-Detailing presentations

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- Average Years in Practice Post-Residency
- Average Number of Patient Visits per Week

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- Rationale for Negative Impact on Practice
- Physician Relationships with Sales Reps

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- Oncology
- Primary Care
- Respiratory / Pulmonology

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- Number of PAs and NPs at Practice
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Introduction

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Definition of the Sunshine Act

All physicians were shown the below definition of the Physician Payment Sunshine Act:

The Physician Payment Sunshine provision ("Sunshine Act") is a section of the Patient Protection and Affordable Care Act of 2010 requiring pharmaceutical and medical device companies to report to the Federal government certain payments they make. The reportable period began in August 2013.

These payments to physicians will be made publically available on a searchable (by practice) government website. Only payments that total over \$100 in a calendar year must be reported.

These transactions include transfers/reimbursements made to physicians for contracted services such as:

- Consulting fees
- Compensation for services other than consulting
- Compensation for serving as faculty or as a speaker for CME program
- Honoraria
- Gifts
- Entertainment
- Food
- Travel
- Education
- Research
- Charitable contributions
- Royalty or license fees
- Current or prospective ownership or investment interests
- Grants
- Any other categories of information regarding the payment or other transfer of value

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Executive Summary

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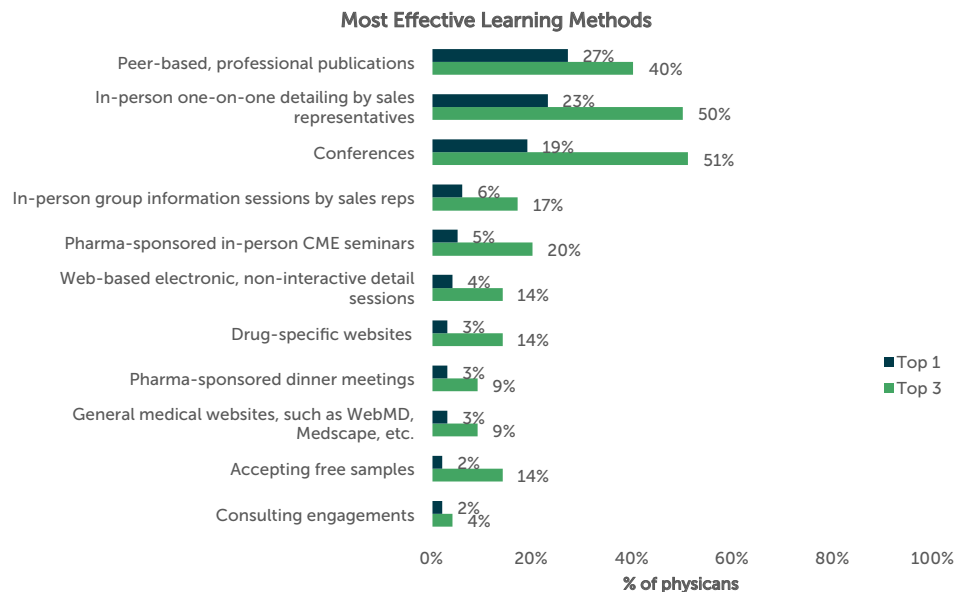


Change in Interactions with Pharma

To set the stage for how interactions with pharma have changed since implementation of the Sunshine Act, it is first important to understand the effectiveness of various methods of learning about medications and treatments.

Three of the top five most effective information channels involve personal, live interaction with pharmaceutical companies: one-on-one sales rep details, group information sessions with sales reps, and pharma-sponsored CME seminars.

"Which [three/one] of the following do you find the most effective in terms of learning about medications and treatments?" (Base=173) Responses with <2% of Top mentions shown in "Across Therapeutic Areas" section.



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Sample Therapeutic Area Profile

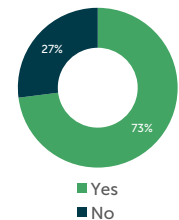
“It has limited exposure of providers to in-person meetings with pharma staff that provide education about certain products.”

Most Effective Sales Teams

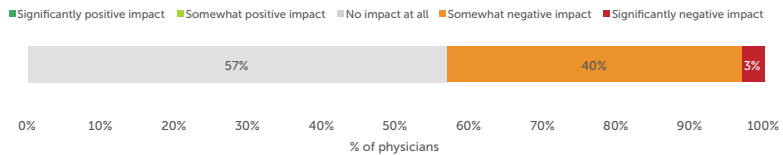
1. AstraZeneca
2. Pfizer
3. BMS
4. Boehringer Ingelheim / Sanofi / Eli Lilly

Expecting Notice of Benefit Value

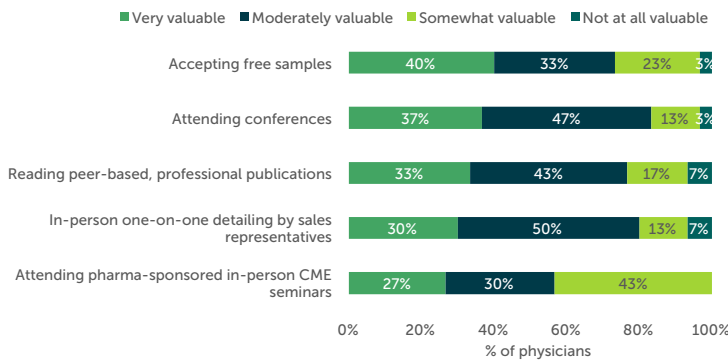
“Would you expect to be notified by the pharma company of the value of a particular service or benefit prior to it being offered to you?”



Impact of Sunshine Act on Practice

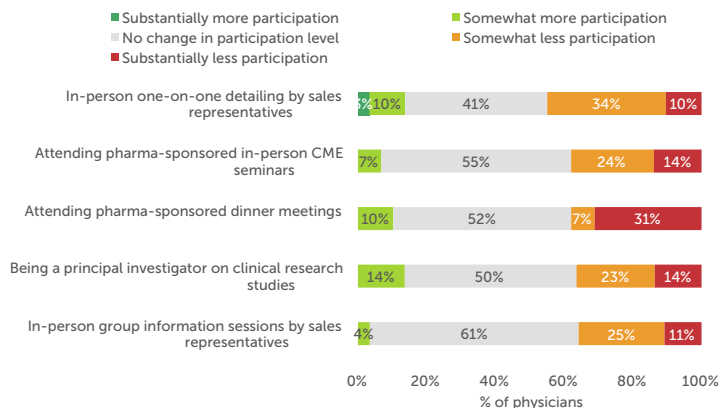


Most Valuable Information Channels for Medications/Treatments



Channels with Biggest Decrease Since Sunshine Act Implementation

“Since the enactment of the Physician Payment Sunshine Act (PPSA) in April 2013 and the start of data collection in August 2013, how has your participation level changed in the following interactions with the pharmaceutical industry?”



Sample Page

CNS/Neurology

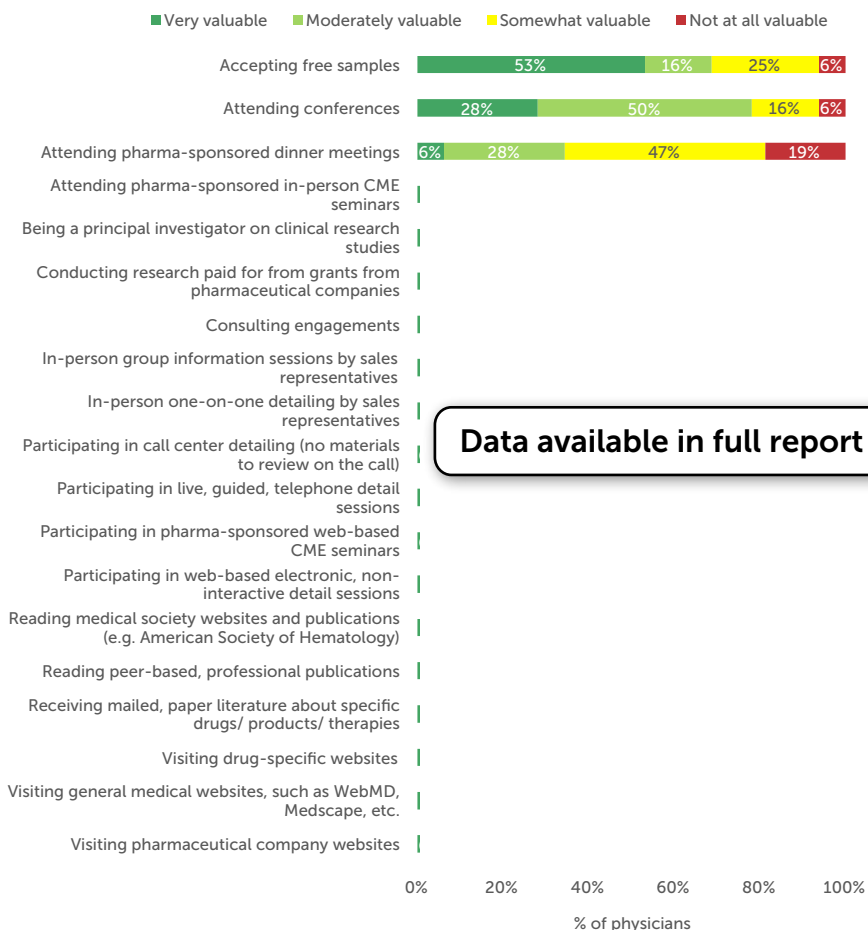
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Value: Information Channels

Most Valuable Information Channels for Medications/Treatments

"How valuable is each of the following in terms of learning about medications and treatments?" (Base=32)



Data available in full report

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Struggle to recruit the right targets and enough of them

RESPONDENTS

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vs.



Undisclosed methodologies and respondent demographics

SAMPLE SIZES

Robust sample sizes that instill confidence



vs.

Often insufficient industry representation that leaves you defending results



ANALYSTS

Decades of experience means more insights that are immediately usable



vs.



Junior analysts capable of reporting numbers