



ANALYSIS

 M3

# Doctor/pharma relationships: the latest research

- The huge shift in knowledge sharing has affected how doctors interact with the healthcare industry as a whole and the pharma industry, specifically.
- The research delivered in-depth insights into the proportion of time doctors use digital resources, and for what reasons.
- If pharma companies want to reach doctors, their websites alone will not suffice. However there is still a role for the medical rep.

*As digital transforms the landscape of communication, how are physicians today interacting with pharma and healthcare resources, what is their perceived value of these resources, and is there variation across European countries? **Paul Rice**, Chief Operating Officer of M3 EU, examines the results of research the company conducted with doctors in Germany, France, Spain, Italy and the UK to find out.*

Even with limited time, it is key that doctors keep up to date with the healthcare industry and the latest drug and technology developments so that they can offer their patients the best treatments.

Doctors are now using a wide variety of resources to share knowledge and interact with each other, both professionally and socially. In addition to more traditional media, there is an abundance of digital platforms, forums, social media and even messaging apps, which are impacting and changing how the industry accesses and interacts with information.

This huge shift in knowledge sharing has affected how doctors interact with the healthcare industry as a whole and the pharma industry, specifically. These changes are not universal, however, and vary hugely across countries.

With such an abundance of resources available, doctors must not only use their time effectively but also ensure the credibility of their sources to avoid bad science.

## Research overview

In order to gain a contemporary view of how doctors are using the resources available to them and interacting with each other and the healthcare and pharma industries, we commissioned research in June 2017 with 1,050 doctors across UK, Germany, France, Spain and Italy. The study also examined the ways medical specialists prefer to receive data and information.



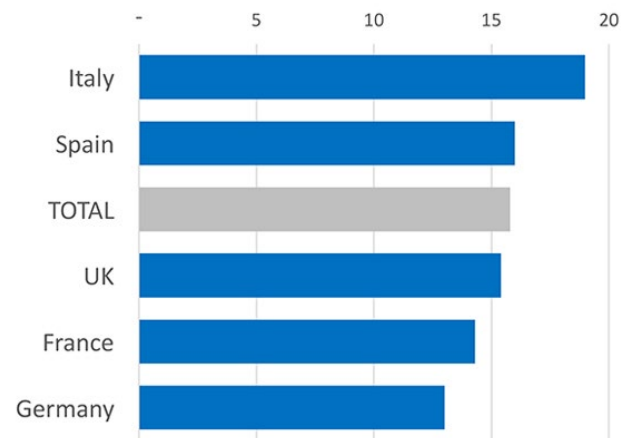
## European comparison

The research delivered in-depth insights into the proportion of time doctors use digital resources, and for what reasons.

It found that Italian and Spanish doctors lead the way for time spent using digital resources for professional purposes.

Although Germany comes last in this table it is the only market where the use of digital resources is greater for professional, rather than social, reasons.

Italy and the UK spend the most total time using digital resources for social and professional reasons in a typical week, with France lagging behind, in fifth.



**Figure 1.** Hours per week spent using digital resources for professional purposes. M3 (EU)

Interestingly, oncologists and haematologists are the groups that spend the most time using online resources for professional purposes, with internet and literature searches proving most popular.

While over half of medical specialists in Spain said they had accessed medical journal sites in the last week, this resource is least popular among German doctors, although still 40% of German doctors had accessed medical journal sites in the last week.

Doctors in Germany are also least likely to attend events, meetings and congresses, while Italian practitioners are the most prolific networkers.

Table 1 shows the most common resources (in order of preference) that doctors use for self development and information gathering, and encompass medical communities, events, websites and journals.

The research also demonstrated that frequency of use is not always aligned with the perceived value of information sources. For example, while 70% of doctors rated medical communities as valuable (scores 1 - 3), only 50% rated social networking as highly, and 29% said that it was of no value in their work.

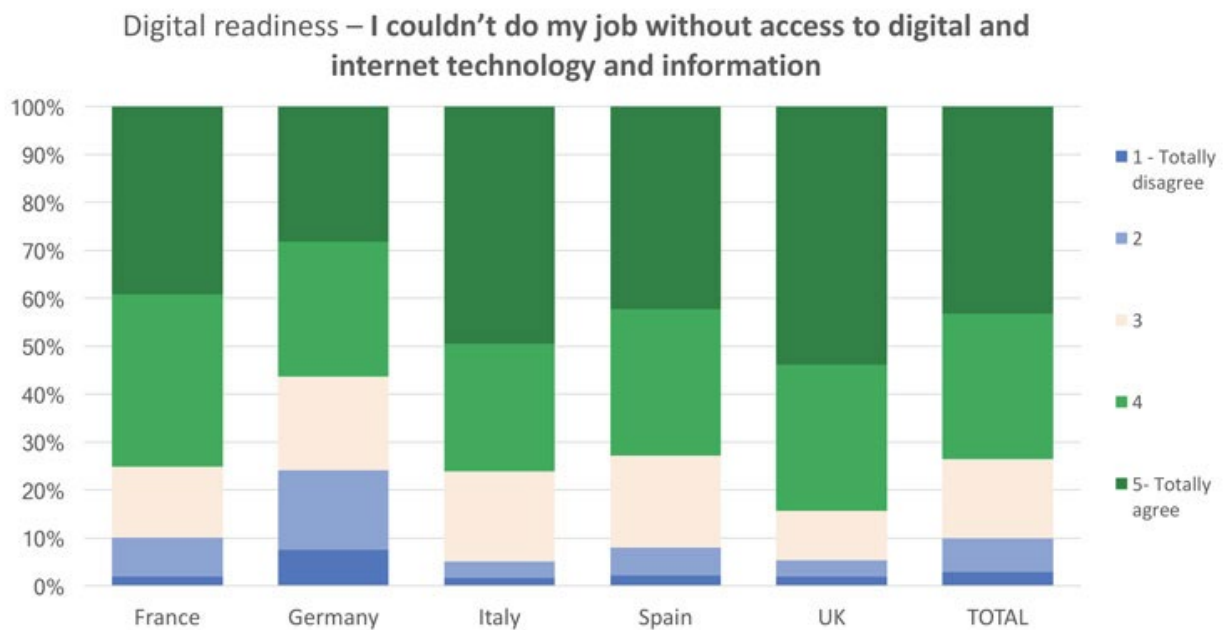
<i>Internet searching</i>	<i>CME/ CPD</i>
<i>Literature searches</i>	<i>Drug references</i>
<i>Online news updates/ emails</i>	<i>Events/meetings/congresses</i>
<i>Social networking</i>	<i>Medical communities</i>
<i>Journal sites</i>	<i>Professional bodies</i>
<i>Print journals</i>	<i>Publisher apps</i>
<i>Medical reps</i>	<i>Pharma mailing</i>
<i>Medical e/ reprints</i>	<i>Pharma websites</i>

**Table 1.** The most common resources used by doctors for self development and information gathering.



# Embracing digital

Healthcare professionals across Europe are embracing digital to resource and interact with other industry professionals. Doctors agree they couldn't do their jobs without access to digital and internet technology and information.

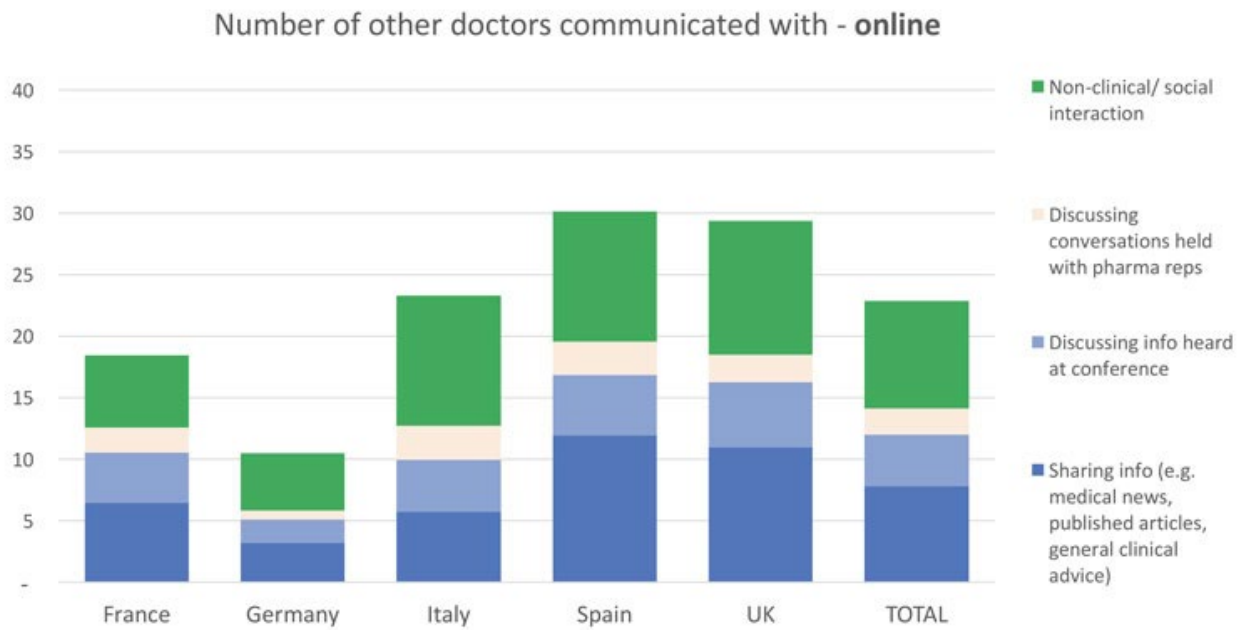


**Figure 2.** Percentage of respondents' abilities to do their job without digital resources, by region. M3 (EU)

In addition, the research uncovered that medical communities and physician networks are playing a crucial role in the way doctors access information and care for their patients. In fact, doctors believe that physician networks facilitate access to important healthcare information and contribute to improved patient outcomes. Moreover, the study showed that doctors continue to put a strong emphasis on the importance of continuous medical education (CME), which is often delivered via medical communities, citing digital platforms as a crucial resource.

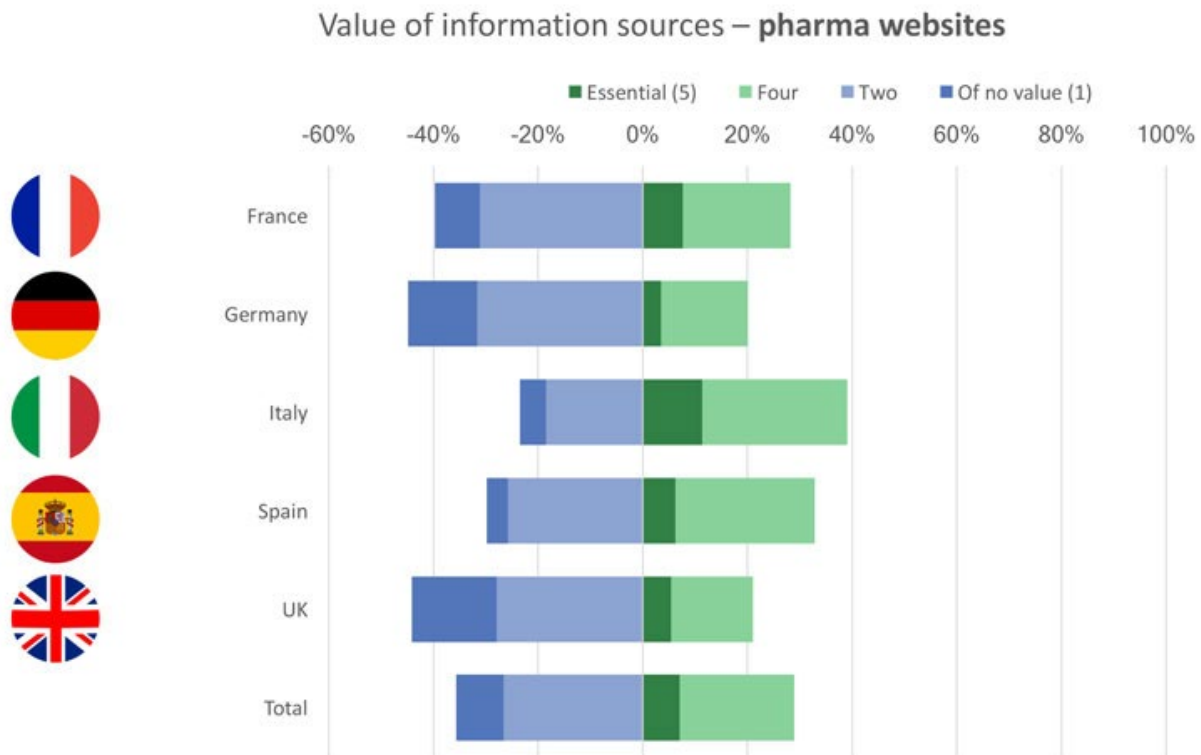
Closed medical communities, in particular, are often valued for their services, including newsfeeds, community forums, and relevant links to online education programmes. Moreover, these digital networks provide a platform for collaborative clinical problem solving via social networking. Around half of doctors in Spain and the UK believe that physician networks have ultimately helped to reduce the cost of patient care, the report found.

Online medical communities and networks offer doctors an opportunity to discuss non-clinical matters, share the latest information from medical conferences and summits and, most importantly, share clinical expertise and knowledge. Figure 3 shows that Spanish and UK doctors use online platforms for knowledge sharing and communicating with other doctors the most, while doctors in Germany are least likely to use online tools for communicating with peers.



**Figure 3.** Average numbers of doctors (in a respondent's therapy area) communicated with online in the last month, by region. M3 (EU).

# Pharma's communication with doctors



**Figure 4.** The importance of pharma websites for doctors by region. M3 (EU).

What are doctors' attitudes towards the pharma industry and the approaches used to interact with medical specialists?

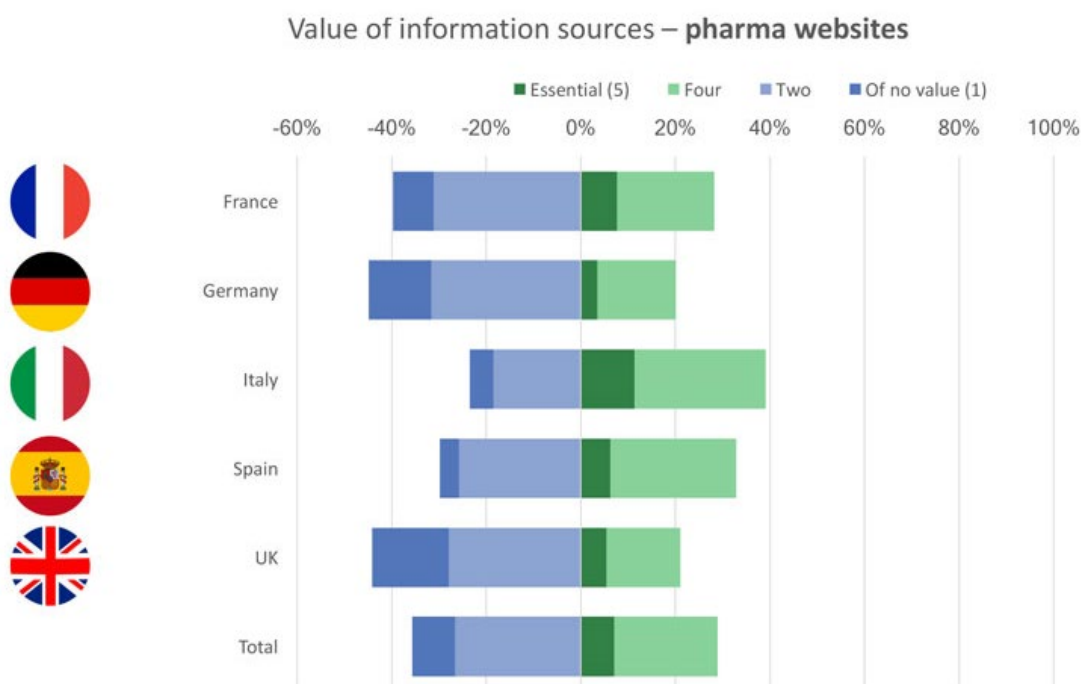
The research found that doctors agree that the use of sales representatives is still an accepted tactic. Overall, the proportion of doctors who rate medical reps as essential or valuable slightly outweighs those who believe that they have little or no value. However, pharma websites are not well perceived; a majority of doctors think they are of little or no value and only 7% rate them as an essential resource. This is in stark contrast to the 40%+ of doctors who say they couldn't do their job without access to digital and internet technology and information. If pharma companies want to reach doctors via digital channels, their websites alone will not suffice.

Digital platforms are gaining popularity among medical specialists, and are the new hotbed for pharmaceutical promotions and information sharing. Online communities deliver pharma companies an opportunity to target doctors at the time they are most willing to receive promotional and educational materials. Furthermore, digital communication campaigns allow the pharma industry to reach a larger proportion of medical staff with their messaging in a fast, economic, and straightforward manner. For example, M3's experience in the UK is that Doctors.net.uk's 'virtual rep' communication campaigns reach 47% of the target GP audience and 34% of the target secondary care audience within a campaign of six digital messages, the average time spent per user being 4 minutes 30 seconds for GPs and 6 minutes for secondary care.

What's more, this marketing tactic can be effective as a standalone digital campaign, or to complement the traditional sales force.

Digital marketing campaigns deliver significant ROI via cost-effective online messaging, which reaches significantly more doctors.

While there is overall agreement that medical reps remain an important resource, there is significant variation between countries. The study found that doctors in Germany, Italy and Spain, on balance, are more likely to regard reps as having value rather than no value, while doctors in the UK are equally balanced between considering them of value and of no value. Interestingly, in France, a slightly greater proportion of physicians rated medical reps of no value than of value.

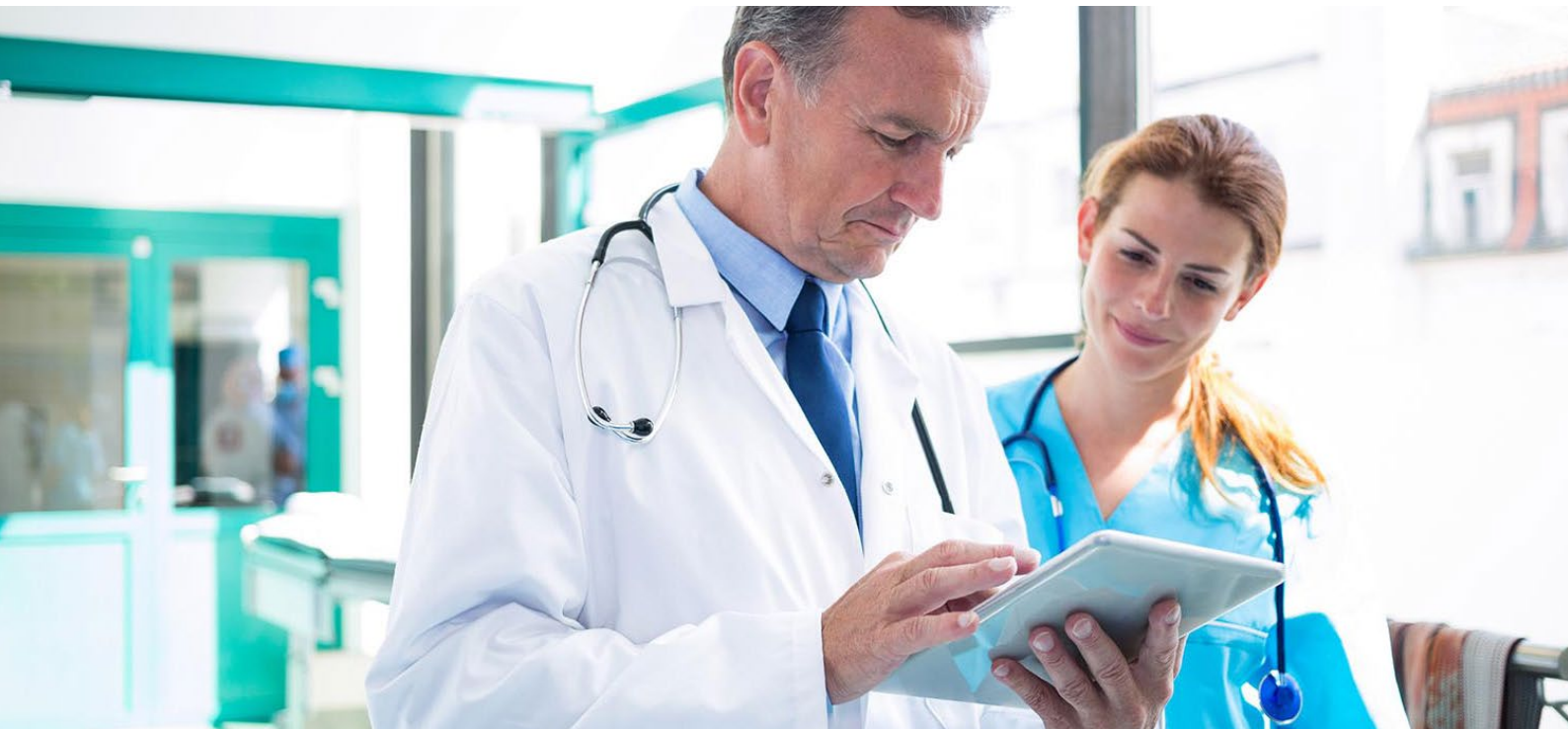


**Figure 4.** The importance of pharma websites for doctors by region. M3 (EU).

## Investing in digital

As online medical communities become essential resources for medical specialists, digital communication campaigns should be at the heart of every pharma campaign.

Recent statistics show that pharma companies are recognising this trend and there is a corresponding rise in digital investments, especially in online meetings, emailing, and digital marketing. Although these currently make up only 3-6% of the total promotional spend, this is expected to increase in the near future.



## Conclusion

The use of digital tools and resources will only grow in the future, both in doctors' personal and professional lives, and online presence will play a major role for pharma companies in reaching their target audience.

While doctors still see the need for medical sales reps, the new best practice strategies for communicating with medical professionals will involve building conversations that combine both face-to-face sales and digital promotions.

This research highlights the wide variety of both online and more traditional resources, used by medical professionals for interacting with peers and accessing and sharing knowledge. Companies that want to get into these conversations need to rethink their communication strategies in order to reach today's time-poor doctors. Use of online resources will ensure that face-to-face contact is then maximised.



It is testament to the importance of the internet, and the digital innovation that has followed, that, in less than 20 years, digital and internet technology and information sources have become so important that over 50% of doctors consider them essential to do their jobs. In contrast, the M3 survey shows that less than 20% consider medical reps essential and, in at least one country, the majority see little or no value in this resource.

“I started my career as a medical rep 40 years ago and it is clear that physicians’ preferred approach to access information has changed dramatically since then; the question is has pharma adapted sufficiently and embraced the opportunity of digital channels?”

“The 2017 Multichannel Maturometer from Across Health provides some evidence. It found that the pharma industry as a whole devoted a relatively low proportion of its marketing spend to digital channels, compared to other industries. Moreover, that survey found that the most commonly-used digital channel, apart from tablet e-detailing, was pharma-owned websites. A total of 74% of respondents to that survey considered a pharma-owned website to be standard practice and a further 17% were involved in pilot projects.

“The finding in the M3 survey that the majority of doctors place a low value on pharma websites suggests that the industry needs to adopt a more doctor-centric, rather than pharma-centric, view to capture the benefit of digital communication channels. This means leveraging channels that are already frequently used by doctors rather than expecting them to come to pharma sites.

“Of course, this is a highly-regulated industry and the adoption of new communication channels poses greater challenges than in most other industries. This may explain the preference to maximise control of the digital experience, but no industry can afford to ignore its customers’ preferences and several innovative companies have already addressed this issue.

“The trend towards digital channels is not a threat, but an opportunity to better align with physician preferences, and I’m confident it will lead to enhanced customer relationships.”

**Comment - John MacCarthy, health & life sciences consultant**

#### About the author

Paul Rice is Chief Operating Officer at [M3 \(EU\)](#), where he has overall responsibility for European operations.

He is passionate about the core mission at M3 which is using technology to help people live longer, healthier lives and reduce costs in healthcare.

He has an extensive career of more than 25 years working across the healthcare sector, including roles as Executive Director at MSD, and responsibility for European Commercial Affairs at Walgreens Boots Alliance.

M3 is a Tokyo-based, global company, whose mission is to apply technology in order to improve outcomes, and reduce costs in healthcare. M3 and its subsidiaries, operate online physician services in Japan, China, the UK, US, Europe and South Korea, involving more than 4 million doctors worldwide. Doctors.net.uk is the UK’s largest online professional community for doctors, with over 225,000 registered members and over 50,000 GMC-authenticated doctors logging in to the network every day. It provides a range of digital solutions to the healthcare industry.

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