

# The future of the **pharmaceutical and GP engagement model**



ADG.

AUSTRALIAN DOCTOR GROUP



# Introduction

While many GPs no longer see sales representatives, pharmaceutical companies have an unprecedented opportunity to engage and support GPs under a digitally led model.

Australia's healthcare system faces significant challenges including an unprecedented demand on doctors and medical professional services. General practitioners (GPs) delivered 18 per cent more services in 2016 / 2017 than they did a decade ago and this is predicted to continue to grow.<sup>1</sup>

This demand is being fuelled in part by Australia's increasing life expectancy, resulting in an aging population<sup>2</sup> presenting with more complex cases with 30 per cent of Australians over 65 now take at least five PBS medicines a day.<sup>3</sup>

Despite increases in the number of Australian trained doctors, more than doubling since the late 1990s, recent locally trained graduates are less likely to work either as GPs or in rural communities compared to local graduates of the 1970s - 1980s.<sup>4</sup>

As partners in healthcare, the pharmaceutical (pharma) industry helps to support these over-stretched GPs and keep them up to date with best practice use of medicines.<sup>5</sup>

However, in the increasingly complex world of medicine, traditional methods of education and communication are quickly becoming inadequate. The integrated nature of medicine and the necessity for healthcare professionals (HCPs) at all levels to have a far greater understanding of complex treatments and therapy areas means traditional single therapy and single profession education is outdated and ineffectual at changing understanding and therefore behaviour in the way that is required.

Until now, drug information has mostly been received by doctors through pharma sales representative (sales rep) visits and educational meetings. But times have changed. Many GPs are too busy to see sales reps<sup>6</sup>,

or are choosing to see fewer than before<sup>7</sup>, while others won't see them purely on principle.<sup>8</sup> Even if they did, many established brands have had their budgets for sales reps reduced or some no longer have the luxury of a field force at all.<sup>9</sup> Also, newly launched primary care medications may have reduced internal priority as the marketing focus moves to novel biological drugs.

But there is a silver lining to these clouds of disruption; the internet has come of age, presenting pharma companies and marketers with new opportunities to engage with these doctors and add value to their professional lives by the timely sharing of relevant knowledge and information.

The question is no longer if pharma companies and marketers should use digital communication; it's how they should use it to ensure maximum engagement and ultimately maximum benefit to the patient.

GPs DELIVERED

**18%** **MORE** 

SERVICES IN 2016 / 2017  
THAN THEY DID A DECADE AGO



# Closed-door policy

An effective medicine has little value if doctors are unaware of it, and the pharma industry has a legitimate right to inform doctors about the characteristics of its products.<sup>10</sup>

A recent survey conducted among the 29,000 registered GPs who read titles published by Australian Doctor Group (ADG) found that only half intend to make time to see pharma sales reps in 2020.<sup>11</sup>

This is a significant escalation of a trend reflected in the table below that shows the proportion of GPs who don't see sales reps in an average week jumped from 28 per cent to 41 per cent in the eight years from 2011 to 2019. At the same time, there was a sharp decline in the number of GPs prepared to see more than one sales rep a week, according to the 850-plus doctors surveyed by the Medical Publishers Association every year.<sup>12</sup>

The decline is not for a lack of trying by these field forces, with more than 40 per cent of GPs reporting that sales reps attempt to see them or speak to them in person every week.<sup>13</sup>

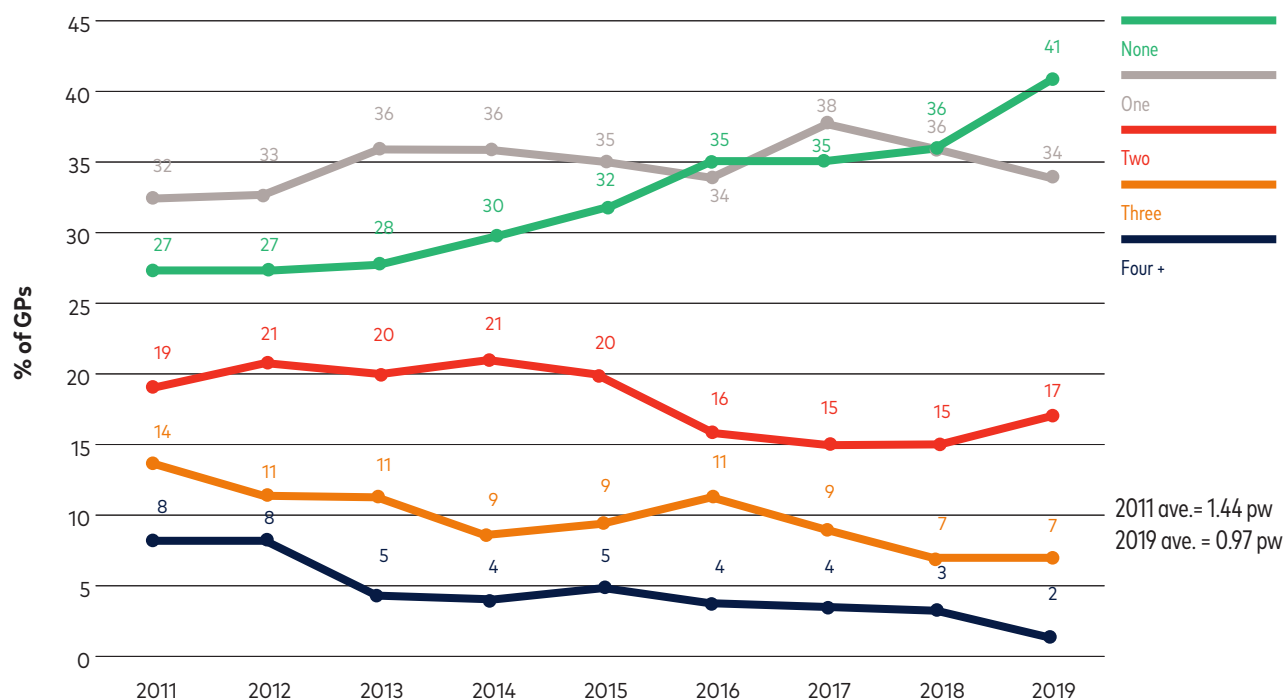
While many GPs see value in these face-to-face meetings with the top reason cited 'to keep up to date on new medications and devices', however the main

reasons they give for not seeing sales reps are that they are too busy, or they don't believe they are an objective source of information. At the same time, an increasing number are finding the information they need online.



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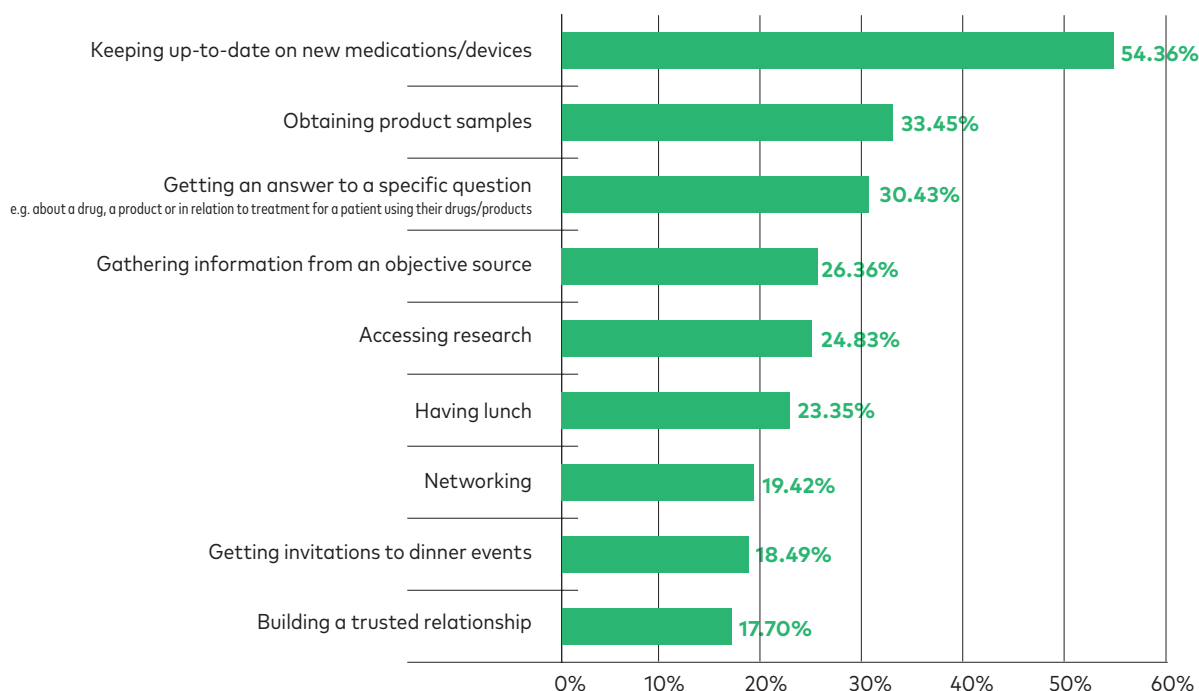
**Number of pharma sales representatives seen in an average week, 2011-2019 (%)<sup>14</sup>**



This trend is not unique to Australia, with a high proportion of doctors in the US, UK and Europe also limiting sales rep visits. The highly regarded Decision Resources Group 2019 ePharma Physician Report shows that an ever-increasing number of doctors are too busy to see sales reps and are turning to the internet for information.

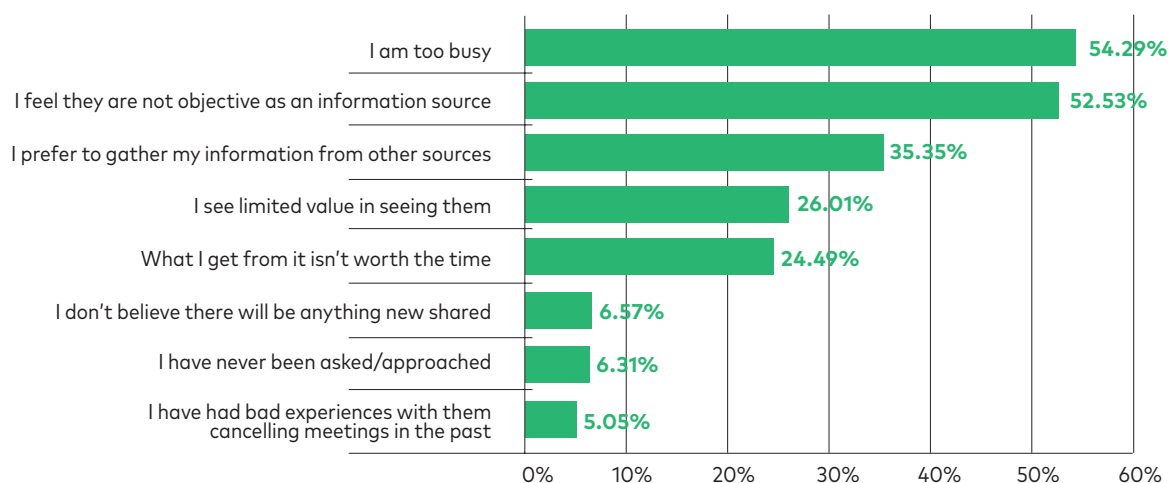
It says the proportion of US doctors seeing sales reps in person fell from 67 per cent in 2018 to just over half in 2019. What's more, GPs are far more likely to shun sales reps than other doctors.<sup>15</sup>

## Reasons for seeing a pharmaceutical sales rep<sup>16</sup>



Q: Please indicate any of the reasons why you would see a sales representative (n=373)

## Reasons for not seeing a pharmaceutical sales rep<sup>16</sup>



Q: Please indicate any of the reasons why you would not see a sales representative (n=396)



# Embracing digital

A large proportion of the respondents to the Decision Resources survey said they never had a question for a pharma sales rep that they couldn't find answers to online.<sup>17</sup>

While reports of the death of the pharma sales rep model are grossly exaggerated (with apologies to Mark Twain and Arthur Miller), it is generally accepted that digital channels present pharma companies and marketers with exciting new opportunities to complement the efforts of the sales team.

Interestingly, pharma company websites have gained credibility with doctors over the past few years, with 46 per cent of respondents deeming them a credible source of information in 2019, versus 27 per cent in 2017. As a result, they're exerting significant influence on doctors' clinical decision-making, with 37 per cent now calling pharma websites influential versus 25 per cent in 2016.<sup>18</sup>

By 2020, close to 70 per cent of healthcare professionals (HCPs) will be digital natives, according to PromoMats vendor Veeva Systems.<sup>19</sup> That means they studied medicine at a time when the internet was already well-established. Qualitative research commissioned by ADG shows that for some of these

“Even the largest pharma field forces touch perhaps a third of all potential prescribers. Alternate channels make it possible to turn the unreachable two-thirds into new sources of growth.”

GPs staying up to date means not being a day behind.<sup>20</sup> Live information is part of their life and for some Google searches are already a routine part of patient consultations. Of course, the challenge for pharma companies and their marketing teams is to ensure these doctors are engaging with their content and not someone else's.

In their essay titled *It's a multi-channel world - Taking the anxiety out of trying new channels*, McKinsey authors Usman Rabbani and Rena Rosenberg make a case for trying new approaches to reach these digital natives and their older colleagues. They write: “We know that most, if not all, doctors now seek

information online before choosing a prescription drug.”<sup>21</sup>

They emphasise that digital solutions are not only useful for reaching doctors who don't see pharma sales reps; they can be used to complement the messages delivered by sales reps or through education events.

Rabbani and Rosenberg explain that alternative channels can also be used to stretch budgets by solving a problem that is becoming increasingly familiar in Australia, such as reduced marketing spend for established medications to free up resources for growing brands. To this end, they encourage pharma companies to get more comfortable with the idea that they don't have to put a highly trained, highly paid sales rep in front of all doctors, at least not as frequently as they do today.

The authors list three ways in which a multi-channel approach can boost marketing effectiveness:

- Extending reach to under-served or hard-to-see doctors;
- Producing higher-quality interactions by serving doctors in ways they prefer; and
- Helping to create a “stereo surround sound” effect to boost “new news”.

“Even the largest pharma field forces touch perhaps a third of all potential prescribers. Alternate channels make it possible to turn the unreachable two-thirds into new sources of growth by creating new touchpoints and ways for companies to interact with those customers,” they write.





# Maximising the effectiveness of your investment

Research shows doctors become receptive to different types of information over the course of a medication's lifecycle.<sup>22</sup> For example, they may be most receptive to product-specific communication, treatment guidelines and samples within 12 months of PBS approval.

As products mature, they may be less open to product information and start to prioritise value-added offerings such as patient resources and general disease-state information.

Unsurprisingly, Australian GPs place the highest value on independent sources of knowledge and information<sup>23</sup>, including medical media such as Australian Doctor and Medicine Today.

Ironically, the areas in which pharma companies traditionally invest most of their budget appear to be the least valued.<sup>24</sup>

Another irony is that despite GPs demonstrating their preference for finding their information online, it is estimated that Australian pharma companies increased their GP detailing investment by 22 per cent between 2015 and 2018.<sup>25</sup>

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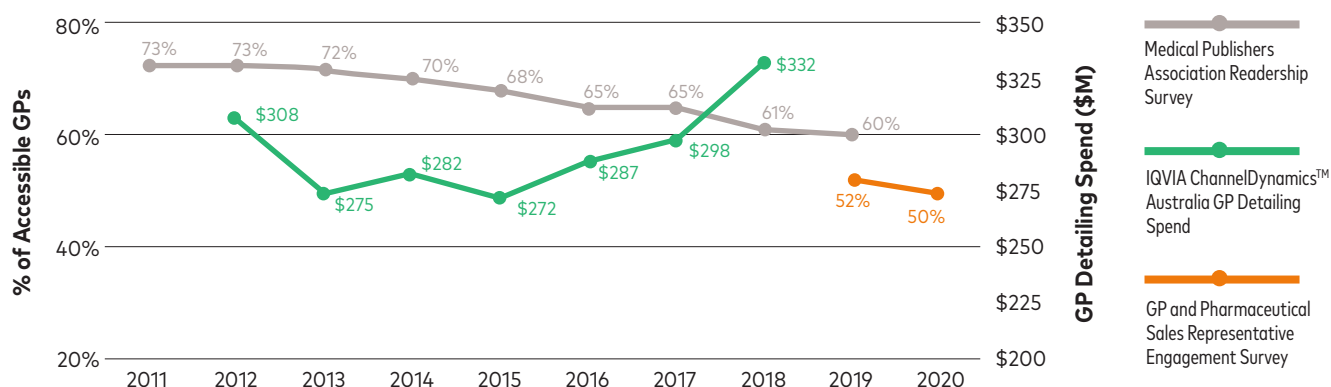
## How GPs rank information sources<sup>26</sup>

Information Source	Average Score of value	Rank
Independent CPD education	7.76	1
Drug references (MIMS – Therapeutic guidelines)	7.7	2
Independent medical newspapers/journals	7.61	3
Independent medical websites	7.1	4
Specialists	7.09	5
GP colleagues	6.9	6
Independent hosted events/ dinner meetings	6.79	7
Colleges	6.55	8
Browsing the internet	6.28	9
Prescribing software	6.2	10
Pharmaceutical CPD education	5.74	11
Foundation/NGO websites	5.49	12
Pharma hosted events/ dinner meetings	5.38	13
Brochures	4.43	14
Sales representatives	4.15	15
Pharmaceutical direct mail	3.75	16

Q: How valuable do you find the following sources of information in keeping up to date and helping you in your job?

(0 = no value; 10 = most value)

## Accessible GPs vs GP Detailing Investment



# Is there a proven global solution to this changing environment?

While most pharma companies have started to build digital capabilities, their efforts can be fragmented, often across many small initiatives.<sup>27</sup>

Without clear strategic direction, marketing teams often struggle to secure the funding and human resources required to reach a viable scale, and they cannot overcome barriers related to the Medicines Code of Conduct and inflexible legacy IT systems. Many companies realise they need to form partnerships to acquire digital capabilities and specialist skills but are often unclear about what kinds of partnerships to set up and how to extract value from them.

Pharma companies have had some success in overcoming these barriers by partnering with publishers that have an opted-in audience of engaged HCPs and prescribers, and sophisticated knowledge of their interests.

A European market leader in this area is the M3 digital network which claims excellent levels of doctor engagement and the achievement of behavioural change for clients. The proviso, it says, is that content is tailored and appropriate for the target audience.<sup>28</sup>

An example of M3's success is a digital campaign for AstraZeneca that increased European doctors' intention to prescribe Onglyza for patients with type 2 diabetes.



## A REPORTED



**INCREASED  
INTENTION  
TO PRESCRIBE**  
ONGLYZA IN THE  
FUTURE

The aims of the campaign included:

- Displacing sulphonylureas for type 2 diabetes patients on monotherapy
- Education of clinicians in the management of patients and impact of treatment choices
- Avoiding the need for marketing approvals in different countries

The solution was a 12-month multi-wave digital communications program via M3 channels, using email, display and on-site promotion. The KPIs were assessed throughout and the outcomes included a 12 per cent open rate for the client's messages and a reported 67 per cent increased intention to prescribe Onglyza in the future.<sup>29</sup>

## A 12% OPEN RATE

FOR THE CLIENT'S MESSAGES

*“ Digital can and does work as an effective channel to engage doctors, as it enables them to consume content on their terms. ”*

**Helen Parfitt, M3 Commercial Director**



Pharma companies and their marketing teams are having similar success in Australia with those willing to embrace this new digital landscape seeing strong positive results.

Below is a real-world example of how a digital-led engagement model helped an Australian pharma company to better engage and support the needs of GPs:

“ We had recently changed our go-to-market model for two of our primary care brands. These brands were no longer supported with a dedicated field force and our marketers faced additional complexity as the two brands were at different points in their lifecycles; one recently launched and the other well-established in market.

“As we searched for digital solutions within the Australian market we came across ADG and Access.PLUS. Their ability to target specific cohorts of GPs with our branded content, along with its pay-per-performance model was attractive. This campaign is the first of its kind for MSD in Australia and has the potential to influence the future direction of pharma marketing.”

**Karen Howard,**  
MSD Marketing Manager, Women's Health

As technology, data integration and reporting catch up to the possibility of new digital go-to-market models available, we are now able to better prove the positive ROI and challenge why digital engagement models are not a critical part of all plans.

GPs THAT OPTED TO BE INFORMED WITH A DIGITAL DETAIL HAD THE CONFIDENCE TO



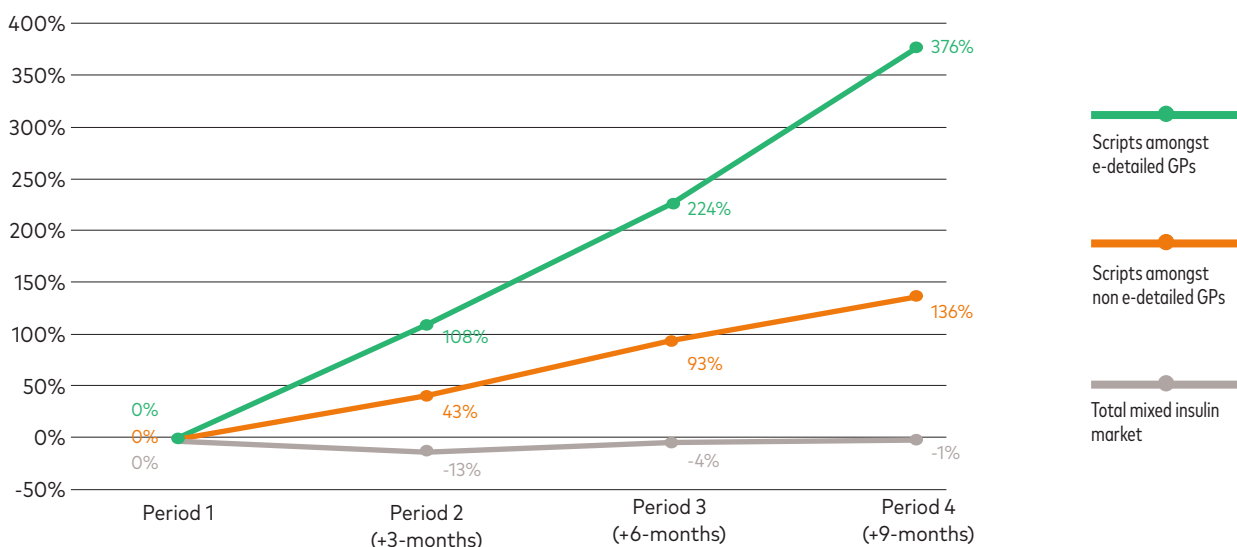
**WRITE  
3X  
AS MANY  
SCRIPTS**

A leading brand in the diabetes market chose to promote their product through the new HCP digital engagement channel, Access.PLUS. With a strong first-line sales force already in place; they were looking to extend the reach of their messaging whilst informing and educating GPs across Australia.

In order to provide a dedicated area to fully explain the products benefits and use cases, a 'brand destination' was developed to house five long-form advertising e-details. Housed within AusDoc.PLUS, which has an audience of 41,000 highly engaged prescribers, hooks and headlines are distributed across the site and e-newsletters to increase traffic to the brand destination's e-details. The details were heavily branded and promotional in nature, whilst conveying condensed, evidence-based information which appeals to GPs.

In a market where total sales of mixed insulins were -0.93 per cent over 9 months, the current go-to-market supported by first-line sales reps drove a +136 per cent growth in scripts written. However GPs that opted to be informed via a digital detail which provided them with the confidence to prescribe the product, translated to three times as many scripts being written.

## NostraData: Mixed insulin market growth rates<sup>30</sup>





# But what do doctors actually want?

GPs are deeply patient centric, applying a patient minded lens in how they prioritise their time and the decisions they make.

GPs gratification from their job comes from seeing the longevity of care, being part of a patient's complete health journey end to end. Many form strong relationships with individuals, their families and build ties within the community, and are highly invested in every aspect of what is best for their patients.

However, medicine is constantly changing and evolving, therefore a key part of the job description

is therefore to stay up to date. Yet, with all the information available, GPs are prioritising the information they want and use this to rapidly navigate and interrogate multiple sources of information to find what they need.

Doctors remain hungry for evidence-based content - whether it's in the form of medical education or native content - that informs practice decisions.

So, when looking at product information, how should pharma companies better support and educate GPs about their products?

## Prioritising the information needs of GPs from the perspective of GPs<sup>31</sup>



### Doctors want to know what this drug can do for their patients

- What are the benefits
- What are the side effects
- What it costs their patients



### They want assurance what is being said is credible

- That there is strong research
- That there are case studies



### They then want help to align it with their own existing knowledge

- How it compares with other drugs they already know / prescribe
- What patient scenarios may it better suit



### And the real world prescription scenarios

- What kind of patient, demographics
- What different cases
- What the right doses are



### Ways to communicate this easily with patients

- Visual resources to use as consultation props



### Ways to get samples

- To allow patients to trial it.







“ Technological innovation has created new digital channels for communicating with doctors in their own time and at their own pace. ”

## Conclusion

While disease and drug information, CPD education and access to samples remain relevant and valuable to doctors, increasing patient demand<sup>32</sup> along with more complex cases means they have less time for this type of content and messaging, including the traditional face to face sales pitch from pharma companies.

Yet, the rapid pace of technological innovation has created new digital channels for communicating with doctors in their own time and at their own pace. As a result, pharma companies and their marketing teams now have access to sophisticated and measurable digital solutions that doctors actually want to engage with.

The fact is that digital communication with doctors has come of age.

Those pharma companies that are willing to accept this new digital engagement model - whether it be to supplement the messaging of an existing sales force, reach GPs that may be geographically inaccessible or disinclined to see sales reps, or even to replace a lost sales force structure - will be the ones to get their messages across.



# A white paper from Australian Doctor Group (ADG)



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*Chief Marketing Officer*



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*Strategic Partnership Director*



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*Marketing Manager*

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## About ADG

Australian Doctor Group (ADG) is the largest and most widely read healthcare publisher in Australia, specialising in educating and informing healthcare professionals for more than 30 years.

With leading titles including AusDoc.PLUS, Australian Doctor, Medical Observer, How to Treat and many more, we enable healthcare professionals to stay better informed with the latest news, opinion and clinical information relevant to the medical community.

ADG believes that informed, connected medical practitioners are a fundamental pillar of Australian society – promoting health and wellbeing, inspiring trust, and enabling all members of the community to live their best lives.

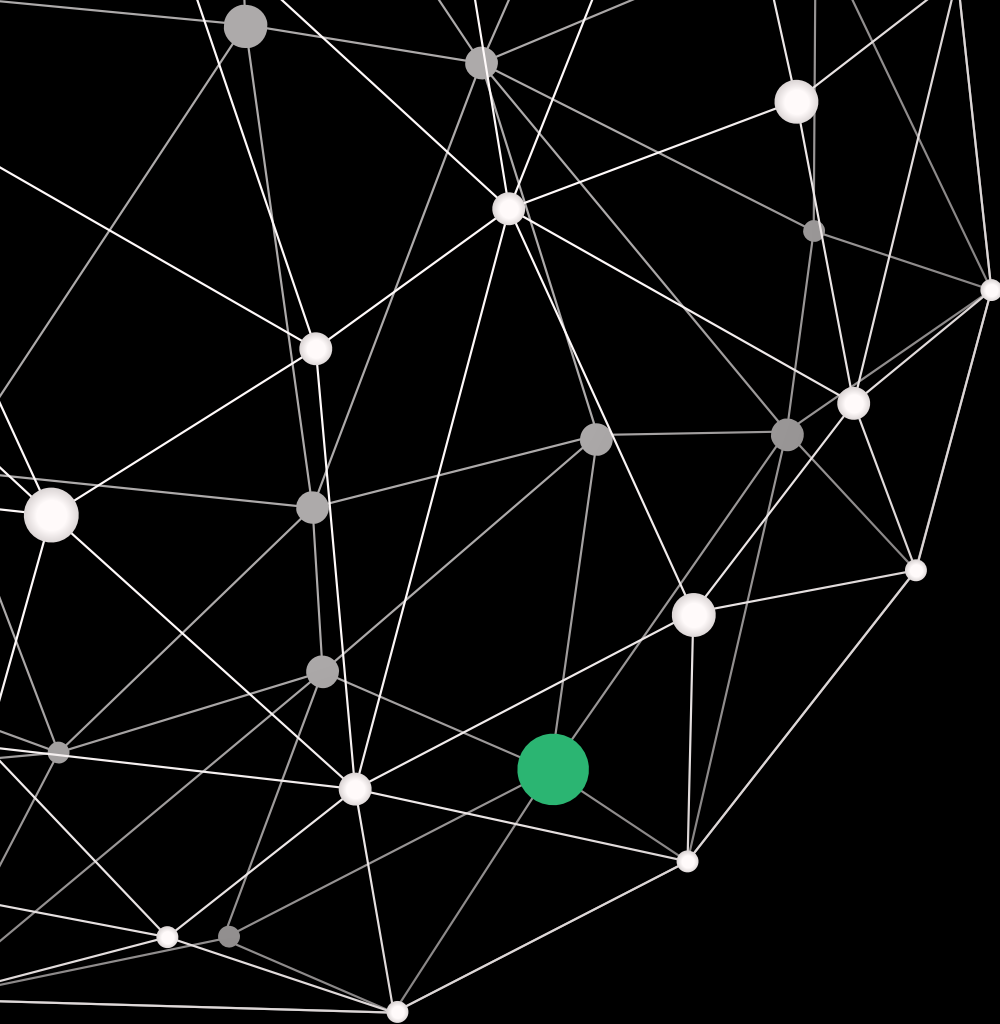
To learn how your brand can benefit from a digitally led engagement model, contact Ross Murray, Strategic Partnership Director, [Ross.Murray@adg.com.au](mailto:Ross.Murray@adg.com.au) or call **1300 360 126**



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