

COVID-19 HCP Sentiment Series

Part 6: Remote Engagement & Physician Information Sources

Published May 2021



Sermo's HCP Sentiment Study: Part 6 research overview

- Questions were solicited from Sermo clients and fielded between February 11-25, 2021
- Sermo invited physicians to participate among a list of twelve specialties across seven countries
- Total sample: 1,688

Country	Sample
United States	739
Japan	165
Spain	161
Italy	160
France	160
UK	156
Germany	147
Specialty	Sample
Primary Care	255
Oncology	139
Gastroenterology	139
Cardiology	138
Neurology	138
Pulmonology	138
Psychiatry	138
Dermatology	137
Endocrinology	136
Urology	129
Rheumatology	121
Hematology	75
Other	5

Part 1:

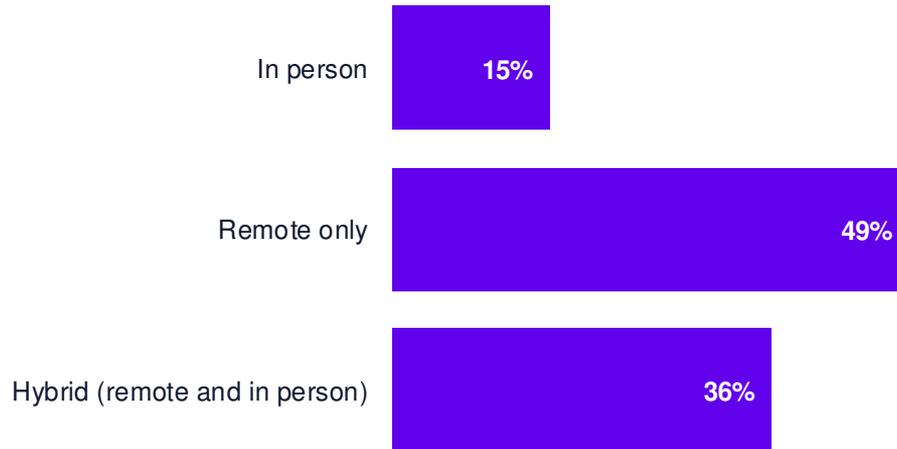
**State of rep engagement today and
expected in the next 12 months**

sermo

Half of physicians say rep interactions today are remote only while 1/3 say interactions are hybrid remote and in person

MODE OF ENGAGEMENT WITH PHARMA SALES REPS TODAY

GLOBAL



BY REGION

	US	EU5	JAPAN
In person	12%*	18%*	18%
Remote only	55%*	47%	35%*
Hybrid (remote and in person)	34%	35%	47%*

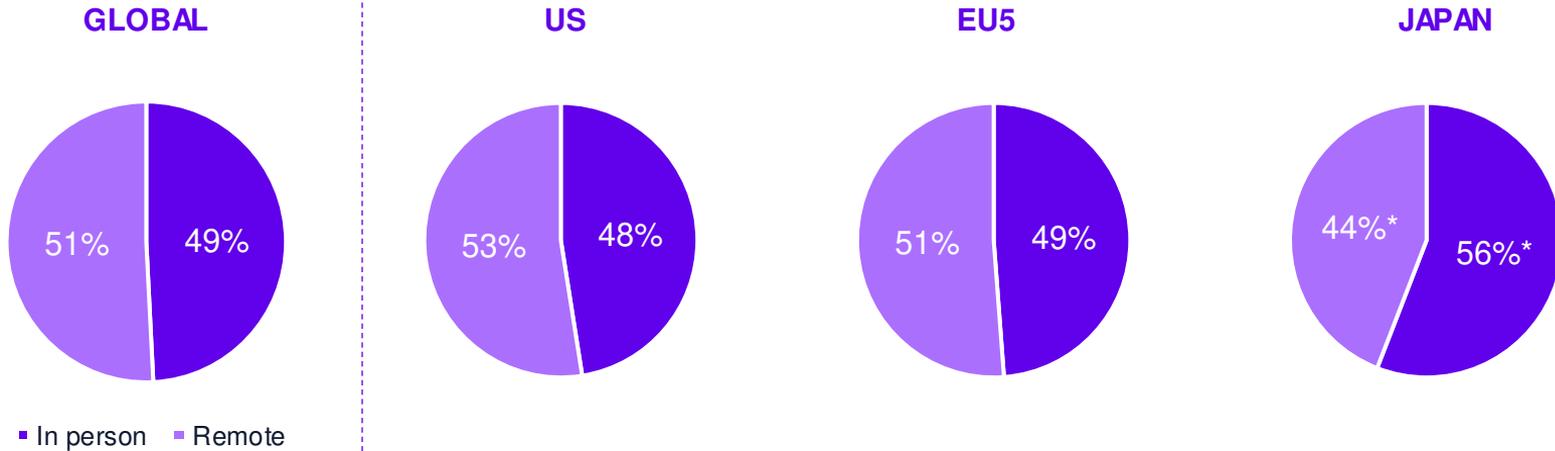
* Significantly different from Global at 95% confidence level
■ Significantly higher
■ Significantly lower

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Q5. How are you engaging with pharmaceutical sales representatives today?

Of those physicians reporting hybrid engagement with reps, they say that interactions are roughly evenly split between remote and in person

HYBRID MODE OF ENGAGEMENT WITH PHARMA SALES REPS TODAY

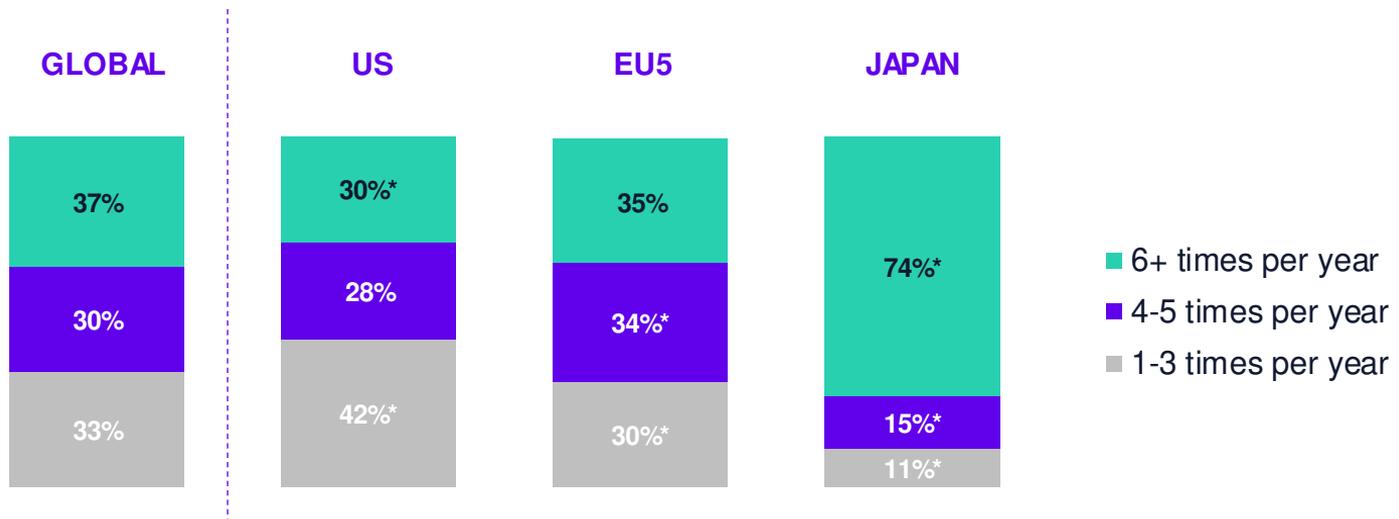


* Significantly different from Global at 95% confidence level

	Total	USA	EUR	JPN
Base Sizes, n=	602	248	277	77

One-third of physicians report high-touch interactions with reps today, consisting of at least 6 engagements per year for a typical brand

FREQUENCY OF ENGAGEMENT WITH PHARMA SALES REPS TODAY



Q6. Today, how many times do you interact with sales representative for a typical brand?

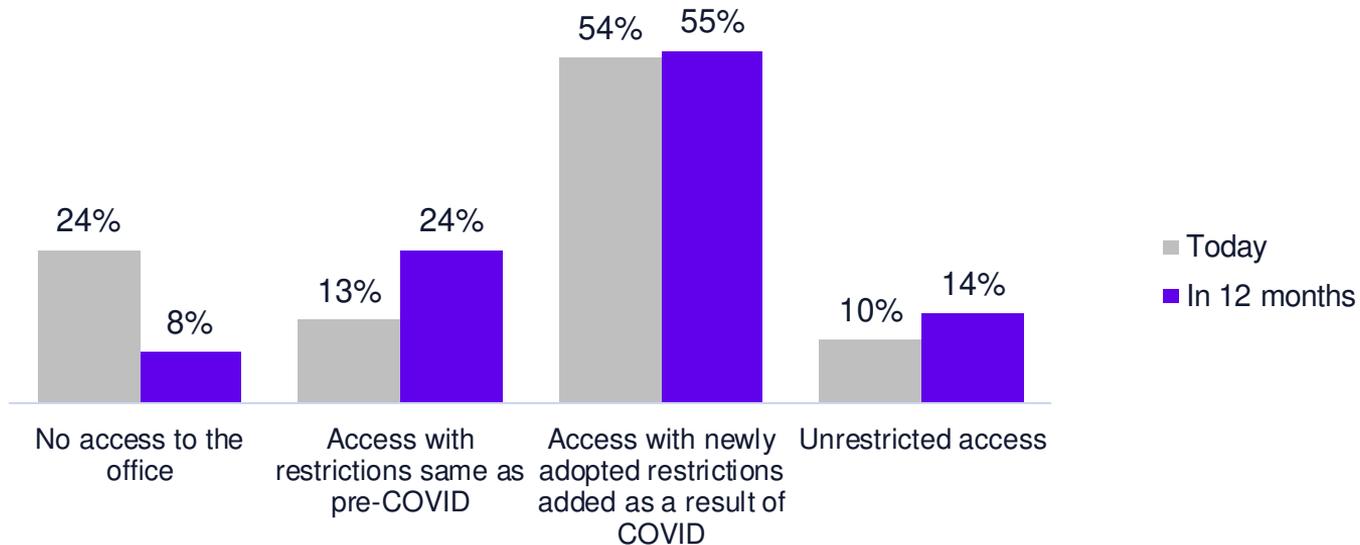
* Significantly different from Global at 95% confidence level

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

In the future, most physicians expect rep office access to remain with COVID restrictions and 1/4 expect access to return to pre-COVID levels

STATE OF ENGAGEMENT WITH PHARMACEUTICAL SALES REPRESENTATIVES

GLOBAL



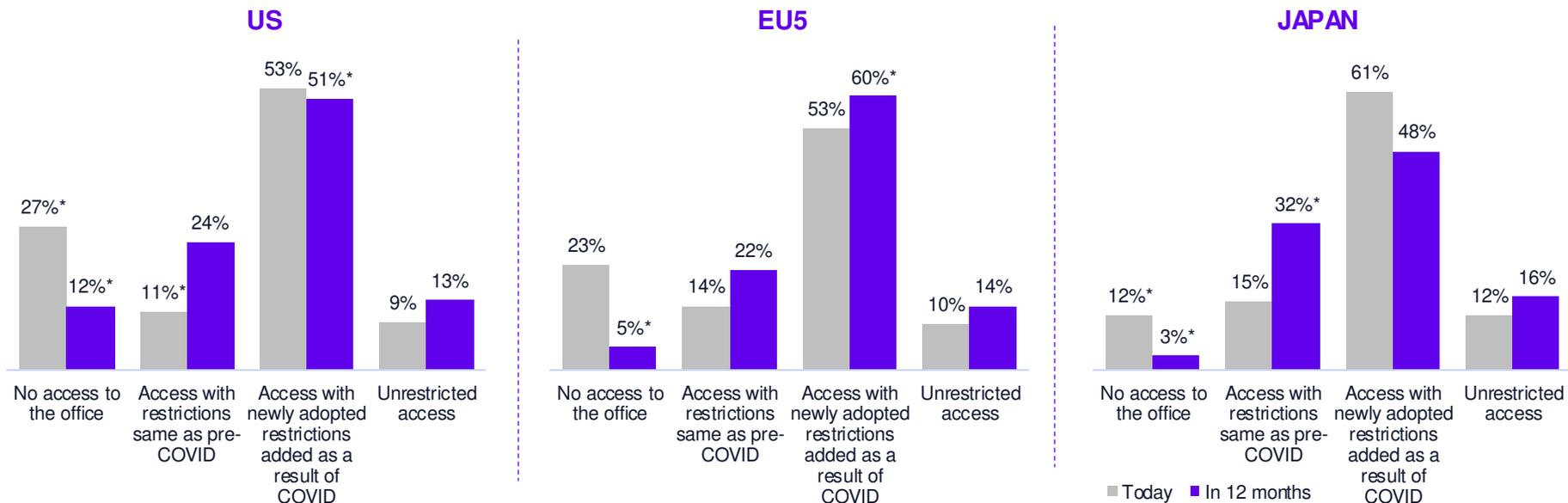
Q1. Today, which statement best describes the state of your primary practice for engagement with pharmaceutical sales representatives?

Q2. In the future (12 months from today), which statement could best describe the state of your primary practice for engagement with pharmaceutical sales representatives?

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Across regions, most physicians expect rep access to remain with newly adopted restrictions and many even expect rep access to return to pre-COVID levels

STATE OF ENGAGEMENT WITH PHARMACEUTICAL SALES REPRESENTATIVES



Q1. Today, which statement best describes the state of your primary practice for engagement with pharmaceutical sales representatives?

Q2. In the future (12 months from today), which statement could best describe the state of your primary practice for engagement with pharmaceutical sales representatives?

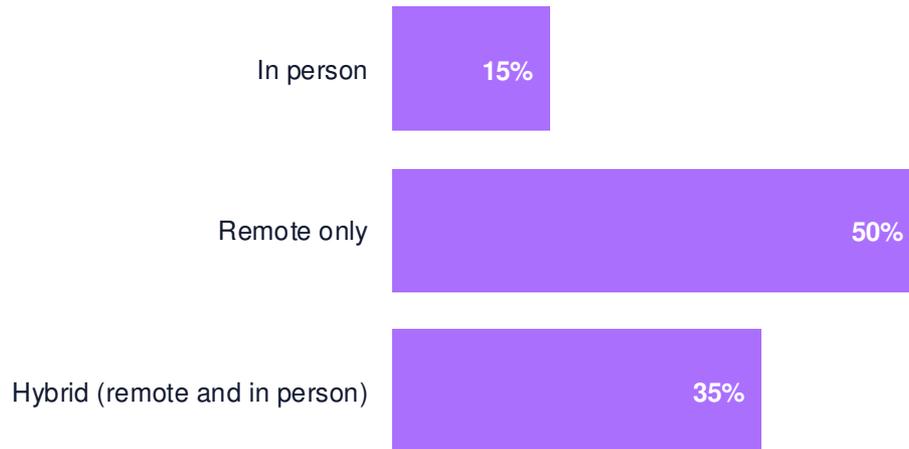
* Significantly different from Global at 95% confidence level

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Half of physicians say non-rep (MSL) interactions are remote only while 1/3 say interactions are hybrid remote and in person, similar to rep interactions

MODE OF ENGAGEMENT WITH NON-REPS (E.G. MEDICAL SCIENCE LIAISONS / MSLs) TODAY

GLOBAL



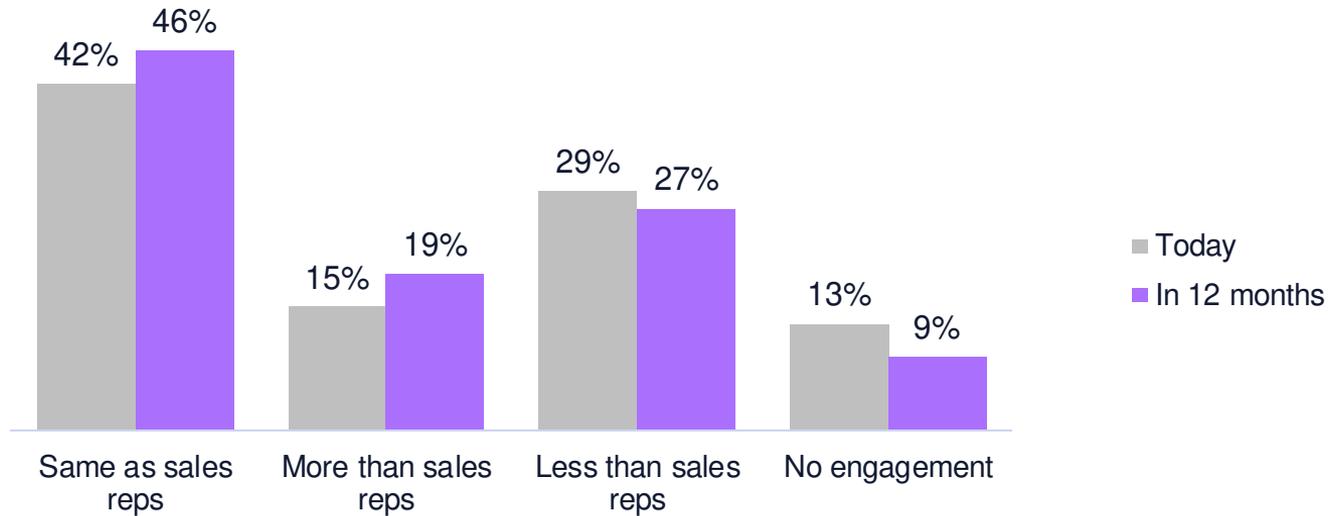
BY REGION

	US	EU5	JAPAN
In person	14%	16%	15%
Remote only	52%	49%	50%
Hybrid (remote and in person)	35%	35%	35%

In the future, most physicians expect access for MSLs to remain unchanged from today

STATE OF ENGAGEMENT WITH NON-REPS (E.G. MEDICAL SALES LIASONS)

GLOBAL



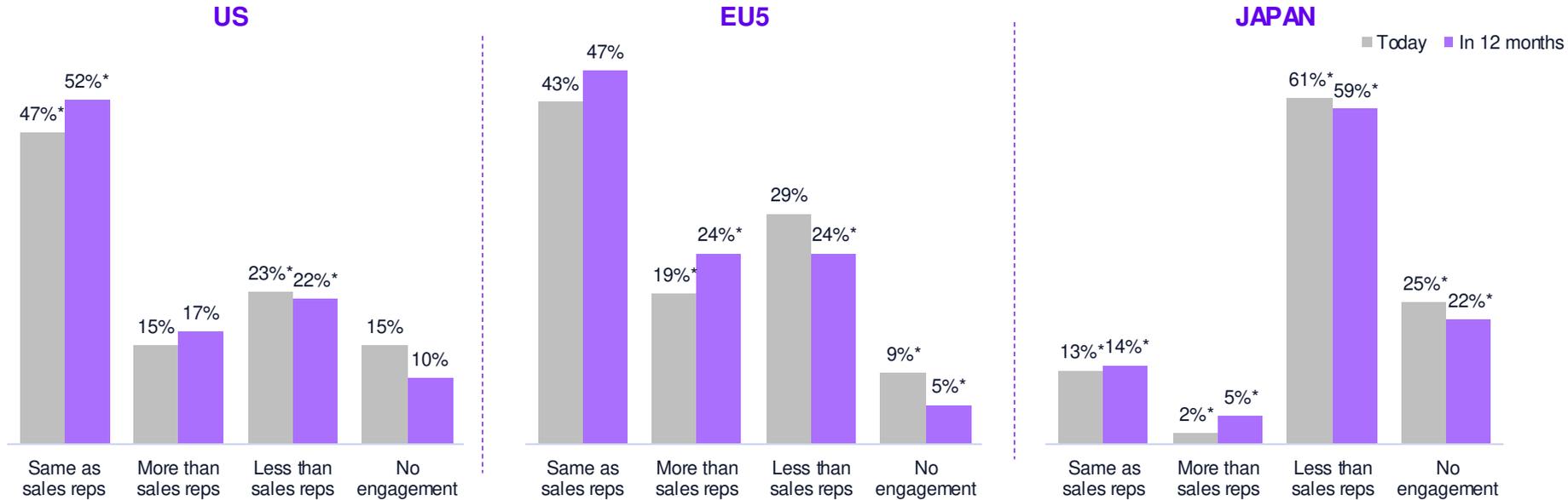
Q3. Today, which statement best describes the access you allow for pharmaceutical non-sales representative roles such as medical science liaisons?

Q4. In the future (12 months from today), which statement could best describe the access you allow for pharmaceutical non-sales representative roles such as medical science liaisons?

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Across regions, most physicians expect access for MSLs to remain unchanged from today to next year

STATE OF ENGAGEMENT WITH NON-REPS (E.G. MEDICAL SALES LIASONS)



Q3. Today, which statement best describes the access you allow for pharmaceutical non-sales representative roles such as medical science liaisons?

Q4. In the future (12 months from today), which statement could best describe the access you allow for pharmaceutical non-sales representative roles such as medical science liaisons?

* Significantly different from Global at 95% confidence level

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

What does this mean for the healthcare industry?

Key findings

- One year after COVID, only half of physicians say sales rep and MSL interactions today are remote only. In person interactions have returned, with 1/3 of physicians saying interactions are hybrid (remote and in person).
- Of those physicians reporting hybrid engagement with reps, they say that interactions are roughly evenly split between remote and in person.
- 1/3 of physicians report high-touch interactions with reps today, consisting of at least 6 engagements per year for a typical brand, especially in Japan where nearly 75% of physicians report at least 6 engagements per year.
- In the future, most physicians expect rep office access to remain with COVID restrictions and a substantial number of them (one quarter of physicians) even expect access to return to pre-COVID levels.

Implications for industry

- One year after COVID, initial trepidation about restricted physician access is largely proving unfounded as the industry finds a new normal of sales rep interactions.
- The new normal of sales rep interactions may very well include access levels returning to pre-COVID levels and newfound ways that pharma interacts with physicians more frequently but less intrusively than in-person interactions.

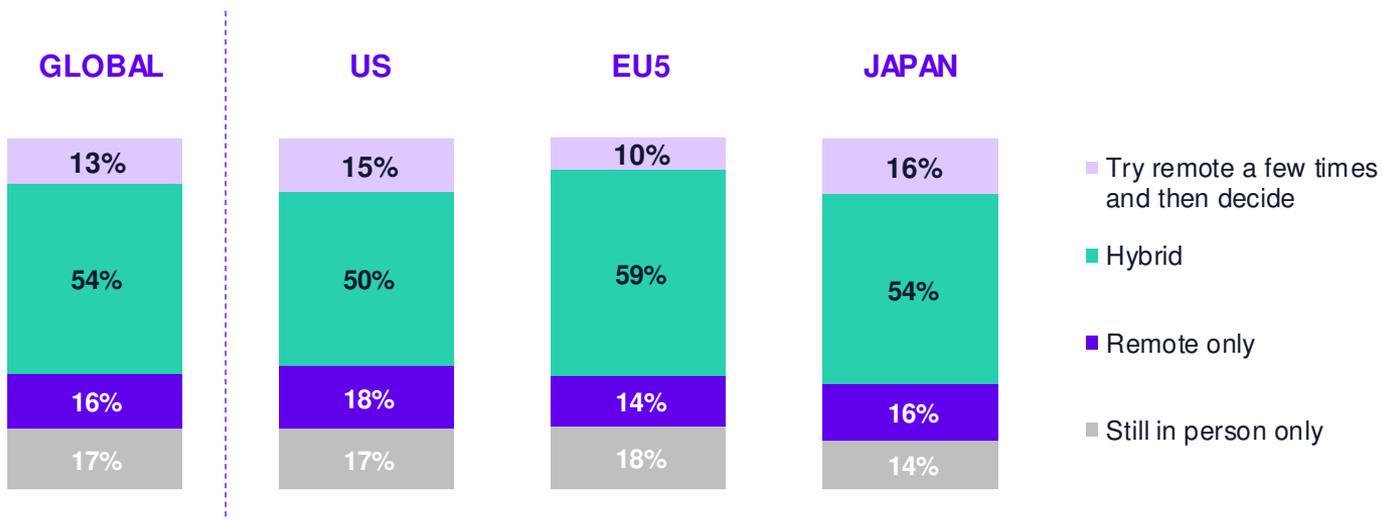
Part 2:

Physicians' rep engagement preferences



Most physicians prefer a hybrid approach to engagements with sales reps in the future

PREFERENCE FOR FUTURE ENGAGEMENT WITH SALES REPS

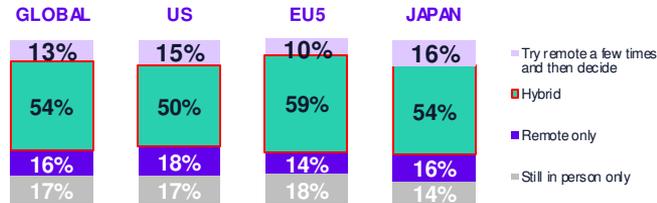


Q8. In the future, if pharmaceutical manufacturers are able to deliver an effective, convenient and high-quality remote form of engagement, how would you prefer to engage with pharmaceutical sales representatives?

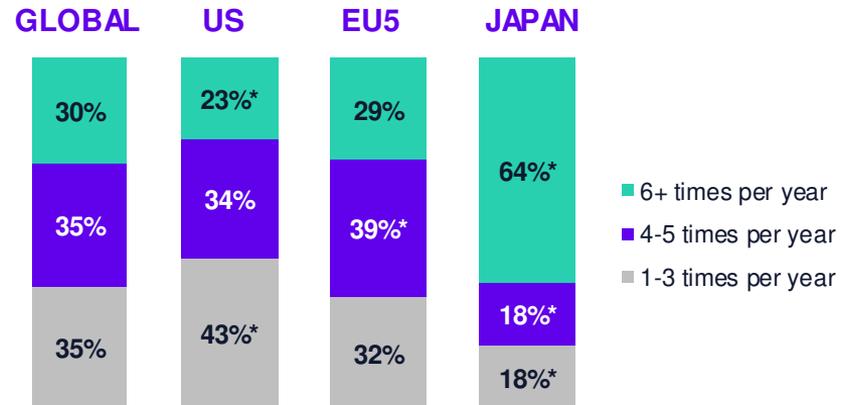
	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Of physicians preferring hybrid interactions, most want low and moderate touch remote engagement levels of 5 times or fewer per year

PREFERENCE FOR FUTURE ENGAGEMENT WITH SALES REPS



PREFER HYBRID - FREQUENCY OF REMOTE ENGAGEMENT WITH PHARMA SALES REPS NEXT YEAR



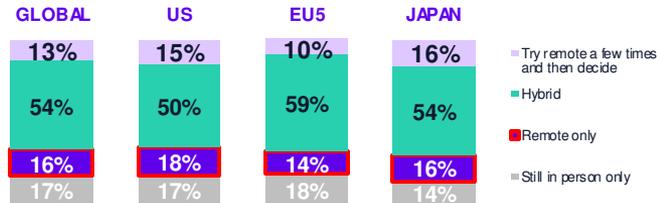
Q11. How many of the interactions during the year will be remote?

* Significantly different from Global at 95% confidence level

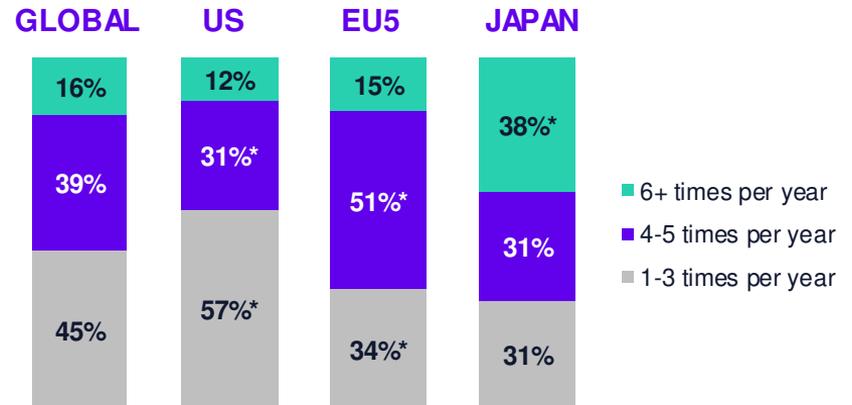
	Total	USA	EUR	JPN
Base Sizes, n=	917	369	459	89

Of physicians preferring only remote interactions, most want moderate and low engagement levels of 5 or fewer interactions per year

PREFERENCE FOR FUTURE ENGAGEMENT WITH SALES REPS



PREFER REMOTE ONLY - FREQUENCY OF ENGAGEMENT WITH PHARMA SALES REPS NEXT YEAR



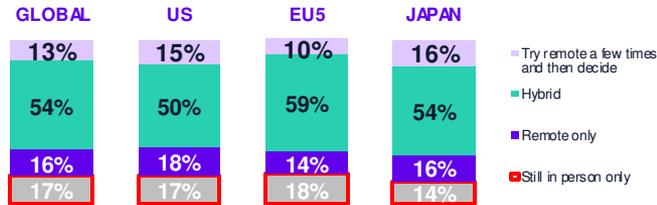
Q10. How many times would you like to interact remote-only with the sales representative in a year?

* Significantly different from Global at 95% confidence level

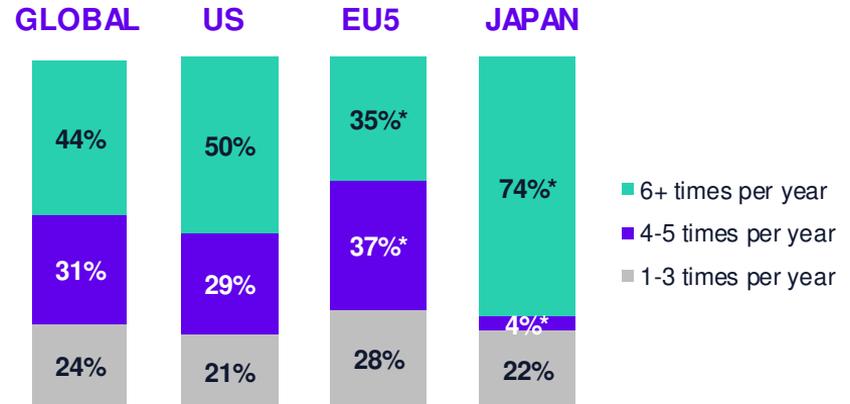
	Total	USA	EUR	JPN
Base Sizes, n=	267	136	106	26

Of physicians preferring only in-person interactions, most want moderate and high-touch engagement levels of 4 times or more per year

PREFERENCE FOR FUTURE ENGAGEMENT WITH SALES REPS



PREFER IN PERSON - FREQUENCY OF ENGAGEMENT WITH PHARMA SALES REPS NEXT YEAR



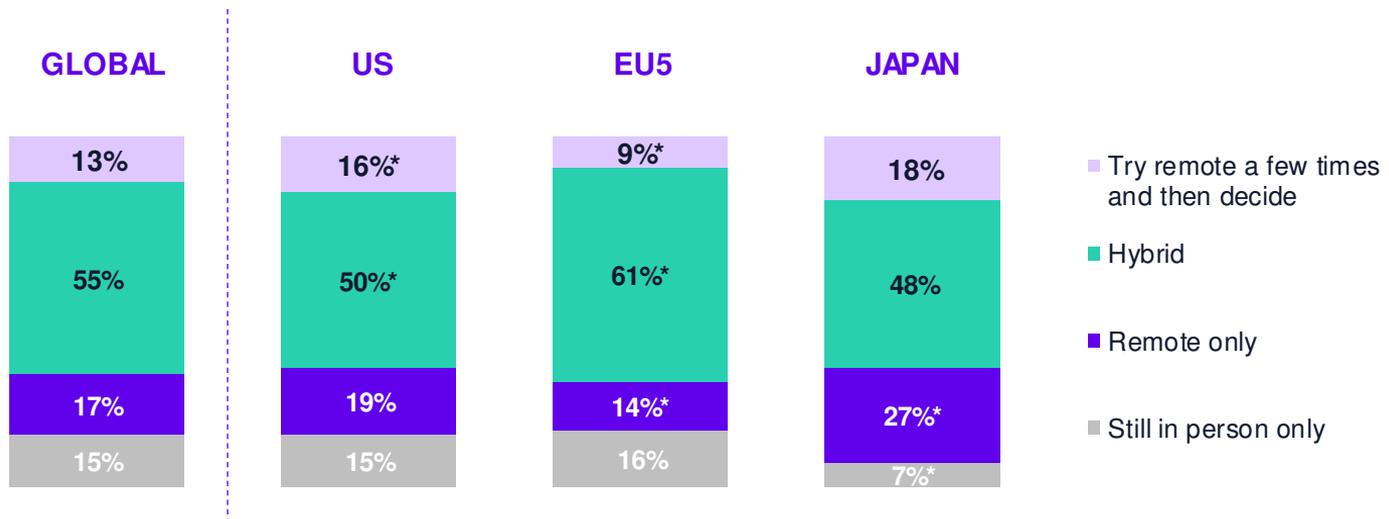
Q9. How many times would you like to interact in-person only with the sales representative in a year?

* Significantly different from Global at 95% confidence level

	Total	USA	EUR	JPN
Base Sizes, n=	286	124	139	23

Most physicians prefer a hybrid approach to engagements with non-reps (e.g. MSLs) in the future

PREFERENCE FOR FUTURE ENGAGEMENT WITH NON-REPS (E.G. MSLs)



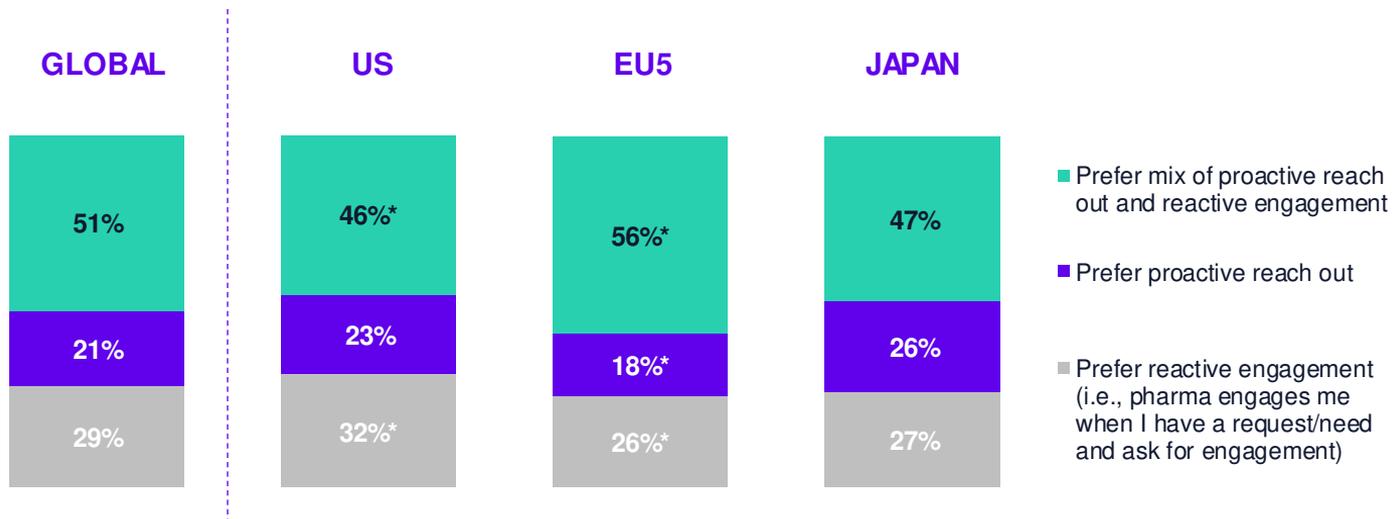
Q13. In the future, if pharma manufacturers are able to deliver an effective, convenient and high-quality remote form of engagement, how would you prefer to engage with non-sales representative roles such as medical science liaisons?

* Significantly different from Global at 95% confidence level

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Most physicians prefer a mix of proactive and reactive engagement by pharma (sales, medical or other reps)

PREFERENCE FOR FUTURE ENGAGEMENT WITH PHARMA



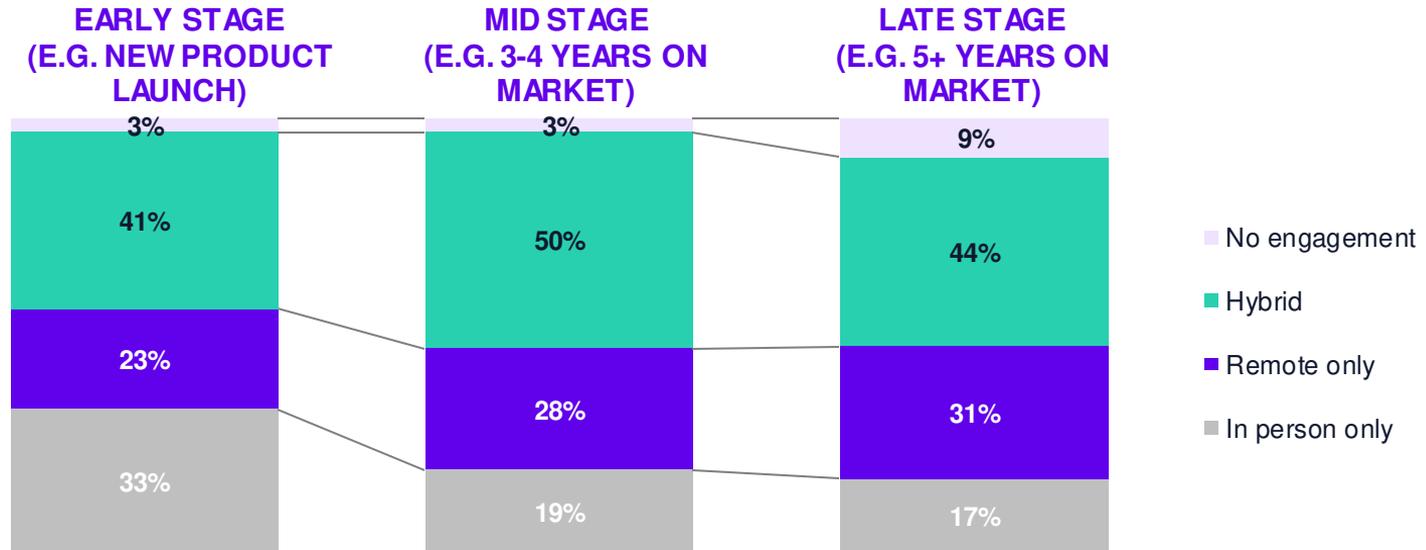
* Significantly different from Global at 95% confidence level

Q14. How do you prefer to engage with pharmaceutical manufacturers?

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Physicians prefer hybrid engagement throughout product lifecycle stage but favor more in-person during launch

ENGAGEMENT PREFERENCE BY PRODUCT LIFECYCLE STAGE

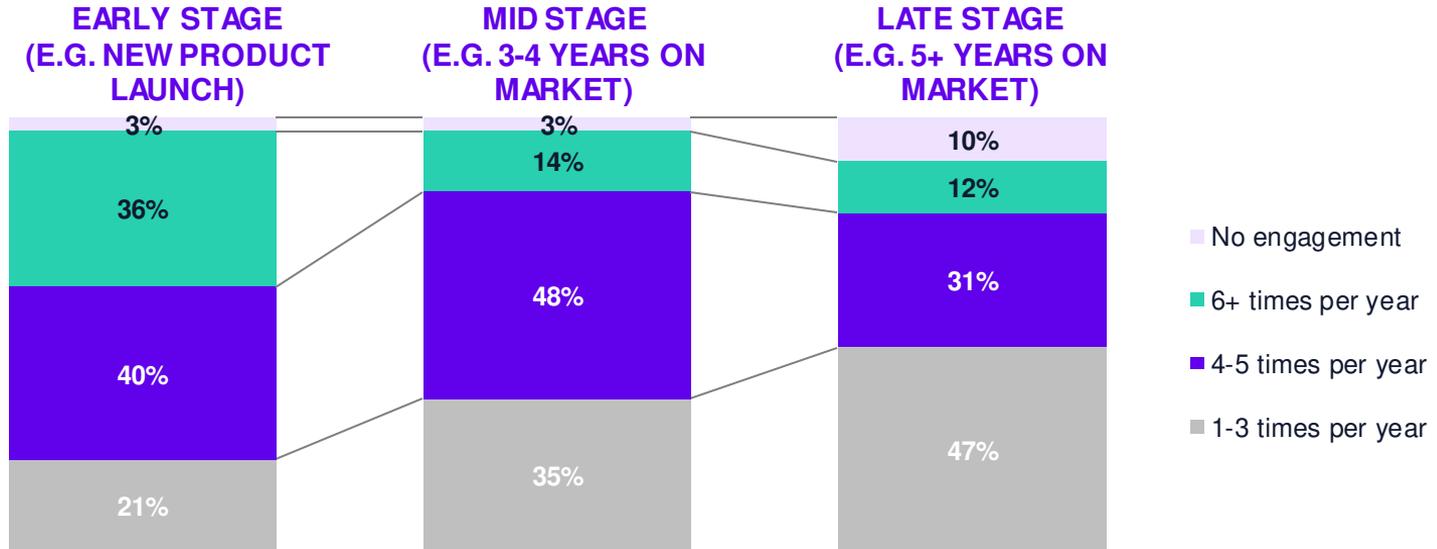


Q15. Would your engagement preference with a pharmaceutical representative change based on the stage of a product in its life cycle—early, mid and late? Select the preferred way of engagement for each stage of product life cycle.

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Physicians prefer higher levels of engagement early in a product lifecycle with less frequency as product matures

ENGAGEMENT FREQUENCY PREFERENCE BY PRODUCT LIFECYCLE STAGE



Q16. How would your preference for annual interaction frequency with a pharmaceutical representative change based on the stage of a product in its life cycle - early, mid and late?

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

What does this mean for the healthcare industry?

Key findings

- Most physicians prefer a hybrid approach to engagements with sales reps and MSLS in the future. Those who preferred in-person only interactions also desired more frequent touches, whereas those who preferred remote only interactions desired fewer touches.
- Physicians prefer hybrid engagement throughout product lifecycle stage but favor more in-person during launch.
- Physicians prefer higher levels of engagement early in a product lifecycle with less frequency as product matures.

Implications for industry

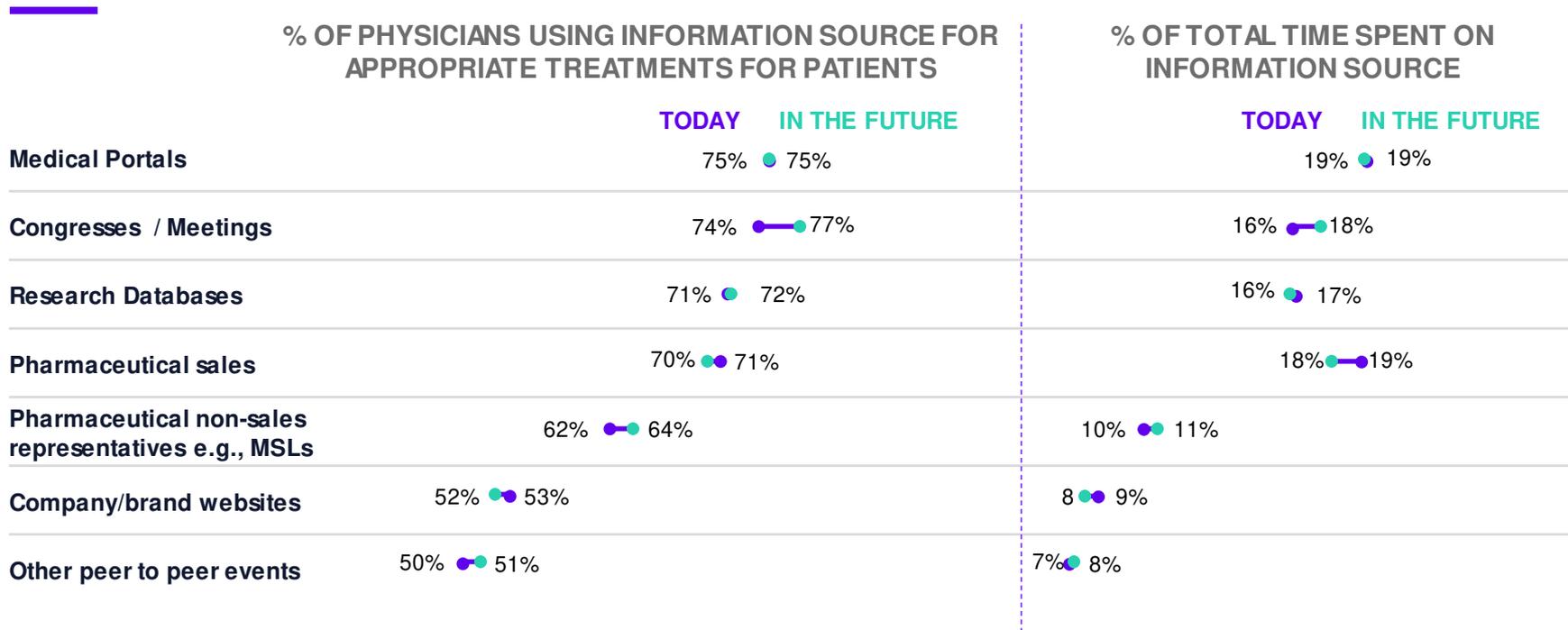
- Physician engagement is no longer 'one size fits all' – physicians have voiced their preferences and know that pharma companies have multiple channels to reach them.
- Understanding the engagement preferences of target physicians will allow pharma to strategically deploy scarce in-person sales rep and MSL resources: they can direct it to those physicians who prefer it and to early stage products where physicians prefer more in-person engagements.

Part 3:

Physicians' preferred information sources

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In the future, physicians expect to use the same sources as they do today to seek information on treatment options and spend similar amount of time on sources



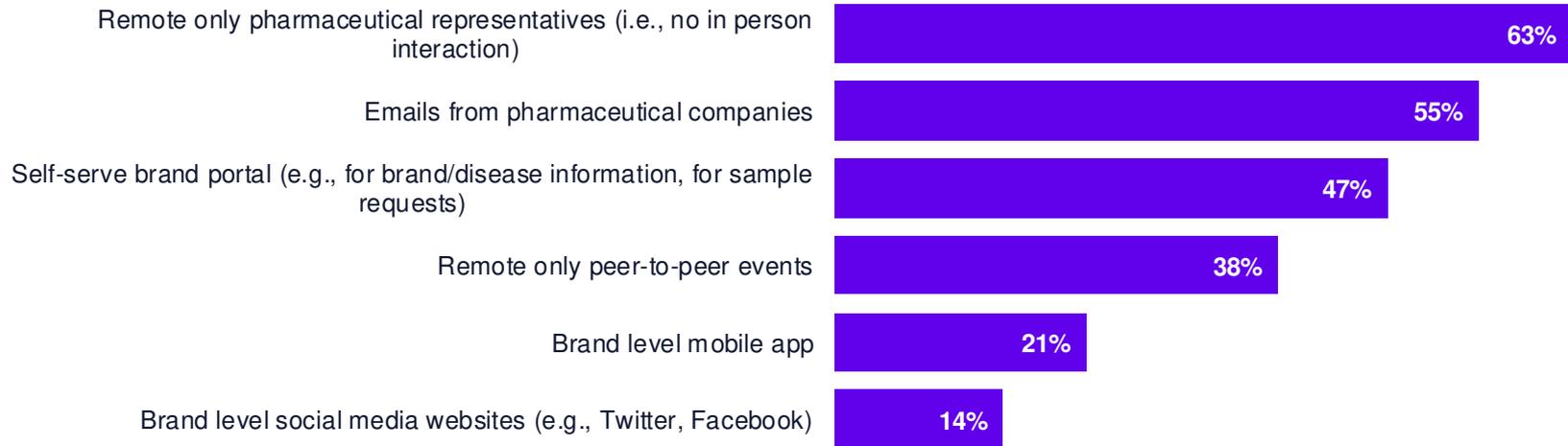
Q19. What information sources do you use today and envision using in the future for data/information on appropriate treatments for your patients (check all that apply and indicate % of time spent totaling to 100%)?

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Sales reps are physicians' most preferred remote information source from pharma companies

% OF PHYSICIANS USING INFORMATION SOURCE IF PHARMA ARE ABLE TO PROVIDE INFORMATION MEETING THEIR NEEDS

GLOBAL



Q20. Please select the sources you can see yourself using if pharmaceutical companies are able to provide information that meets your needs [select all that apply]

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Physicians desire slightly less product brand information during their rep interactions and desire more info on disease state and patient services

	% TIME SPENT TODAY	IDEAL TIME DISTRIBUTION	IDEAL VS. TODAY
1 Product brand information	44%	39%*	Desire less
2 Disease state information	15%	17%*	Desire more
3 Patient services	12%	14%*	Desire more
4 Product samples	10%	11%*	Desire more
5 Reimbursement support	10%	11%*	Desire more
6 Office support	8%	8%	--

Q17. In your current interactions with pharmaceutical representatives, what topics do they normally discuss with you and ideally, what would you like to discuss?

* Significantly different from % time spent today at 95% confidence level

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

Physicians desire less product information during rep interactions as product matures and more patient services and office support

	% TIME SPENT FOR EARLY STAGE PRODUCT	% TIME SPENT FOR MID STAGE PRODUCT	% TIME SPENT FOR LATE STAGE PRODUCT	CHANGE DURING PRODUCT LIFECYCLE
1 Product brand information	46%	38%*	33%**	
2 Disease state information	16%	17%*	17%	
3 Patient services	11%	14%*	15%**	
4 Reimbursement support	10%	12%*	12%**	
5 Product samples	10%	11%*	12%**	
6 Office support	7%	9%*	10%**	

Q18. How does the information you desire from pharma manufacturers differ based on the stage of a product in its life cycle? (% of time totaling 100% within each column)

* Significantly different Early Stage at 95% confidence level

** Significantly different from Mid Stage at 95% confidence level

	Total	USA	EUR	JPN
Base Sizes, n=	1688	739	784	165

What does this mean for the healthcare industry?

Key findings

- In the future, physicians will continue to use medical portals, congresses/meetings and research databases most for information regarding treatment options for their patients.
- Sales reps are still physicians' most preferred information source from pharma companies, over and above other remote sources like emails, websites, portals, apps or peer-to-peer events.
- The types of information discussed during rep interactions are closely aligned with physician desires, though slightly less product brand information and more info on disease state and patient services would be preferred.

Implications for industry

- The central role of sales reps is undiminished – aside from medical and scientific sources, sales reps are still physicians' most preferred information source from pharma companies.
- With myriad digital channels to invest in, pharma should continue to invest in sales reps even if remote.

Thank you!

To learn how Sermo can support your HCP insights and engagement goals, email us at business@sermo.com

