



## Physicians Open to Digital Communications

**TRENDING NOW:** As sales reps see doors close for in-person visits with physicians, digital doors open communication.

As physicians seek information about drugs, increasingly more look to digital communication channels to learn about new therapies or ask questions of pharmaceutical companies. This finding — from a new report by ZS — shows that communicating via a customized mix of digital media and visits from sales representatives provides the best opportunity to engage with physicians.

While personal selling remains in the top three preferred channels for nearly half (47%) of all HCPs, the report also found that physician interaction with pharma company communications varied distinctly by provider specialty. For example, about half of all oncologists studied (49%) place heavy restrictions on rep access. But many of these oncologists will also engage with pharma via digital channels. Leveraging these non-personal promotional channels in addition to rep details can help extend a company's reach with this specialty group by 35%.

On the other hand, traditionally rep-friendly specialists — such as dermatologists and allergists — engage less frequently with other channels. Adding alternative means of engagement to the marketing mix for these rep-friendly specialists only extends reach by 5% relative to what the salesforce already achieves.

“The ability to integrate and coordinate physician outreach across multiple platforms has a powerful impact on a company's sales and marketing budget, increases overall effectiveness and improves customer experience,” says Malcolm Sturgis, an associate principal at ZS.

▼ For more information, visit [zsassociates.com](http://zsassociates.com).



Malcolm Sturgis

### Nurses and PAs Want

#### PATIENT RESOURCES FROM PHARMA

As healthcare reform elevates their role in primary care, nurse practitioners and physician assistants are emerging as a critical audience for pharma companies, according to findings from Decision Resources Group.

In fact, 79% of NPs and 69% of PAs provide or recommend patient support resources to patients. NPs and PAs are an important audience for pharma, since they write prescriptions and enjoy broad autonomy in their practices. There is substantial demand for patient resources from pharma among

these professionals. Almost two in five physician assistants agree that they would feel motivated to engage pharma digital assets more often if pharma provided them more resources that they could share with their patients.

“Nurses and PAs are really healthcare reform's front line, and they play an important role in patient engagement,” says Principal Analyst Matthew Arnold. “Those pharma companies that are making substantial investments in patient resources should factor the needs of these professionals into their outreach plans.”

▼ For more information, visit [decisionresourcesgroup.com](http://decisionresourcesgroup.com).

### NPs and PAs are a Critical Resource

- » **Increasing patient education:** NPs and PAs are spending more time on patient education — 47% of PAs and 43% of NPs say the time they spend on patient education has increased over the past two years.
- » **Health professionals use of EHRs:** NPs and PAs spend much more time using electronic health records (EHRs) than physicians do, where physicians spend an average 2.8 hours per day using EHRs, PAs spend 4.4 hours in EHRs and NPs 4.7 hours. EHR use by these professionals increased significantly from 2013 to 2014, without a corresponding decrease in time spent on other digital resources.
- » **Interest in pharma digital resources:** There is strong interest among NPs and PAs in pharma digital resources tailored to their clinical and professional needs. For example, 42% of NPs indicated that they would be inclined to engage pharma digital resources more often if they were tailored to patient populations of interest.

Source: Decision Resources Group

### Remote eTMF Access to

#### DOUBLE IN 2015

The number of clinical trial sponsors that plan to provide auditors with remote access to their electronic trial master file is increasing. More than 32% of TMF owners surveyed in the Veeva 2014 Paperless TMF Survey report they will grant auditors remote access to their eTMF by early 2015, versus the 16% who provide them access today, a jump of 100%. An additional 12% of survey respondents indicate they will give remote access to their eTMF as soon as they have the technology to support it.

“The dramatic rise in sponsors planning to provide remote access is not surprising,” says Jennifer Goldsmith, VP of Veeva Vault.

▼ For more information, visit [veeva.com](http://veeva.com).

## THERAPEUTIC TRAX... ▶

## ARTHRITIS

The market for psoriatic arthritis (PsA) therapies will grow nearly 66%, increasing to \$3.7 billion in 2023, owing to the continued uptake of premium-price biologics and novel therapies that are expected to launch during the 2013 to 2023 forecast period. In 2013, five marketed TNF-alpha inhibitors dominated sales in the PsA market with more than 90% of the \$2.3 billion major-market total.

Source: Decision Resources Group, Pharmacor report entitled Psoriatic Arthritis

▼ For more information, visit [decisionresourcesgroup.com](http://decisionresourcesgroup.com).

## CANCER

The gastric cancer market will grow exponentially from more than \$1.1 billion in 2013 to nearly \$3.8 billion by 2023. Fuelling this growth will be the launch of five targeted therapies for unresectable locally advanced and metastatic gastric cancer. Lilly's Cyramza, which was approved by the U.S. FDA in 2014, is the first targeted therapy to enter the second-line metastatic setting and thereby partially fulfills an unmet need.

Source: Decision Resources Group, Pharmacor Gastric Cancer

▼ For more information, visit [decisionresourcesgroup.com](http://decisionresourcesgroup.com).

The breast cancer therapeutics pipeline boasts a high degree of innovation in first-in-class molecules, with many new technologies holding the potential to transform the clinical and commercial treatment landscape over the coming decade. Breast cancer has the largest drug pipeline in the pharmaceutical industry, with 816 products in active development across all stages. Of these treatments, 245 first-in-class programs are for 175 first-in-class molecular targets, accounting for 39% of all products with a disclosed molecular target.

Source: GBI Research, Frontier Pharma - Breast Cancer - Identifying and Commercializing First-in-Class Innovation

▼ For more information, visit [gbiresearch.com](http://gbiresearch.com).

The global non-small cell lung cancer (NSCLC) treatment market value will increase from \$5.1 billion in 2013 to slightly over \$7.9 billion by 2020, expanding at a CAGR of 6.6%. Established players, such as Lundbeck and Forest (Actavis) are developing products to broaden and strengthen their portfolios. More specifically, both companies are aiming to enter the adjunctive therapies space of the depression market with developing atypical antipsychotics for the treatment of patients with MDD.

Source: GBI Research, Non-Small Cell Lung Cancer Market to 2020

▼ For more information, visit [gbiresearch.com](http://gbiresearch.com).

## CNS

The attention-deficit hyperactivity disorder (ADHD) therapeutics market value will rise to \$9.9 billion by 2020, with broadening diagnostic criteria a key driver of growth. This increase, which represents a CAGR of 5.3% and relates to eight major markets (the US, the UK, France, Germany, Spain, Italy, Japan and Canada), will occur fastest in Japan, due to its high ADHD prevalence.

Source: GBI Research, ADHD therapeutics to 2020 - Broadened Diagnostic Criteria and Growing Adult Prevalence to Drive Market Growth Despite Patent Expirations

▼ For more information, visit [gbiresearch.com](http://gbiresearch.com).

Drug sales for major depressive disorder in 2013 were about \$9.3 billion across the seven major markets and Australia covered. By the end of the forecast period in 2023, sales will grow to about \$9.7 billion with a CAGR of 0.39%.

Source: GlobalData, PharmaPoint: Major Depressive Disorder - Global Drug Forecast and Market Analysis to 2023

▼ For more information, visit [globaldata.com](http://globaldata.com).

## EPIGENETICS

The global epigenetics market was valued at an estimated \$413.24 million in 2014. This market is expected to grow at a CAGR of 13.64% between 2014 and 2019 to reach \$783.17 million in 2019.

The epigenetics market is segmented on the basis of products into enzymes; instruments and consumables; kits; and reagents. The epigenetics enzymes market consists of three subsegments, namely, DNA-modifying enzymes; protein-modifying enzymes; and RNA-modifying enzymes. Of these, the DNA-modifying enzymes segment had the largest share of the epigenetics enzymes market in 2014 and is expected to grow at the highest CAGR between 2014 and 2019.

▼ For more information, visit [marketsandmarkets.com](http://marketsandmarkets.com).

## IMPLANTABLE DRUG DELIVERY DEVICES

The global implantable drug delivery devices market will reach \$21.1 billion by 2018, recording a CAGR of 8.8% from 2012 through 2018.

The market, which stood at \$11.6 billion in 2011, will benefit from an increasing occurrence of cardiovascular diseases, diabetic retinopathy, colorectal cancer, chronic pain conditions, a growing elderly population worldwide, as well as the high

prevalence of unwanted pregnancies. These factors are projected to have the highest impact on the implantable drug delivery devices market over the forecast period. Other low-impact, yet equally vital factors that will propel this market include: favorable initiatives by NGOs and governments, a growing demand for minimally-invasive surgeries, as well as a rise in the number of registered interventional cardiologists.

▼ For more information, visit [transparencymarketresearch.com](http://transparencymarketresearch.com).

## INFECTIONS

While physicians are receptive to emerging antibiotics for drug-resistant gram-negative infections, payers expect to limit hospital use of novel premium-priced agents. Hospital pharmacy directors indicate that drug pricing will be central to formulary positioning of these new gram negative infection agents; cost-conscious pharmacy directors expect to impose a variety of prescribing restrictions.

Source: Decision Resources Group, U.S. Physician and Payer Forum report entitled Gram-Negative Infections: How Will U.S. Payer and Prescriber Receptivity to Novel Antibiotics Shape the Market for These Therapies?

▼ For more information, visit [decisionresourcesgroup.com](http://decisionresourcesgroup.com).

## PAIN

The pharmaceutical industry will improve treatments for pain relief and increase revenue from 2014 to 2024. The R&D pipeline is strong. Overall world revenue for that market area will reach \$68.2 billion in 2014. There will be sustained growth, particularly for the BRIC nations of Brazil, Russia, India, and China. Regulatory, demographic, and commercial developments worldwide will influence the markets both in the established North American and Western European economies, and the fast-rising emerging markets.

Source: Visiongain, Pain Relieving Drugs Market Forecast 2014-2024

▼ For more information, visit [visiongain.com](http://visiongain.com).

## RESPIRATORY

The 2013 sales for asthma at about \$15.9 billion across the eight markets covered. By the end of the forecast period in 2023, asthma sales in the seven major markets and Australia are expected to grow to \$23.1 billion at a CAGR of 3.8% over the 10-year period.

Source: GlobalData, PharmaPoint: Asthma - Global Drug Forecast and Market Analysis to 2023

▼ For more information, visit [globaldata.com](http://globaldata.com).