

## **THE MAJORITY OF PRIMARY CARE PHYSICIANS ARE NOW USING THE INTERNET IN MAJOR WESTERN MARKETS**

In hindsight, the year 2000 will probably be seen as the year that the Internet moved into the mainstream within medical practice – it is now the minority of Primary Care Physicians who have NOT used the Internet in major western countries. P\SL Research is running a comprehensive international study about physicians' usage and attitudes towards the Internet called I.MD 2000. In the most recent wave conducted in Q2 2000, anywhere between 55% (in Germany) to 93% (in the USA) of Primary Care Physicians had ever used the Internet.

The current level of Internet usage varies by country but everywhere the trend is towards greater usage of the Internet – with many non-users planning to go online in the near future. Projections made based on stated future intentions and employing a deflating factor indicate that by Q2 2001, anywhere between 75% (in Germany and Italy) and 97% (in the USA) will have ever used the Internet.

Yet, “ever having accessed” is only the first step in understanding how the Internet is used by physicians and what the opportunities are for pharmaceutical marketers. It would be misleading to think that this measure is enough to define the size of the online community of PCPs. Different types of physicians use the Internet in different ways.

The more P\SL Research has explored the usage of the Internet within the healthcare market, the more we have come to understand how the usage of the Internet is evolving amongst different physicians segments. What is interesting is to explore how much physicians are evolving their applications of the Internet in the same way, albeit at different stages of development, and how much they are differentiating from each other.

So, who is the “online” doctor? What proportion and type of doctor could you hope to reach with an online strategy? I.MD 2000 has been developed with both phone and online survey methodologies with these questions in mind.

### **Study Methodology**

The phone phase of I.MD 2000 was conducted amongst nationally representative samples of PCPs (or GPs as they are more commonly known in Europe) in USA, Canada, the UK, Germany, France, Italy, Spain, and Brazil. This phone phase was essential to understand how the Internet is being adopted amongst the entire PCP community. A second phase of the research was conducted via the Internet to discover how the Internet is being used amongst a separate sample of online PCPs in these same countries.

Both phases of this I.MD 2000 wave of research were fielded from mid-March to mid-April 2000 with 1,000 interviews conducted by phone and roughly 750 conducted online.

A number of identical demographic and Internet usage questions were asked in both the phone and Internet phases of research. This provides essential data in which to help judge the value of online communication within the marketing mix.

## Report Structure

Few doubt that the Internet will have a major impact on the way medicine is practiced – but no one knows exactly how things will change. This research program is committed to monitoring these changes. The latest survey specifically considers the effect of the Internet on how physicians relate to their medical practice, their patients and pharmaceutical companies. A taste of what is available with this data is outlined below.

## Medical Practice

One of the peculiarities about the healthcare sector is how the *culture* of medical practice in the major western countries has maintained distinctly national characteristics. How will the Internet be integrated into these different national settings? What type of medical information are physicians seeking on the Internet? To what extent are they using the types of tools and resources that are available on different websites? With whom do they communicate via the Internet?

Certainly there do seem to be differences emerging in how physicians find out about specific web-sites. Medical reps have been helpful in recommending medical web-sites to physicians in France, Germany and Italy whereas in the UK, colleagues are a much more important interpersonal source.

## Patients

There has been a great deal of speculation as to how the doctor-patient relationship might be altered given this newfound ease with which the Internet allows patients to keep abreast of medical developments. How much will doctors encourage the use of the Internet amongst their patients, and for what reasons? And do patients discuss information they collect from the Internet with doctors?

In most countries the majority of online doctors do encourage patients to collect information from the Internet, particularly relating to disease information. It will be interesting to see how the Internet becomes used for more sophisticated uses, for example, to maintain a diary about their disease or condition. Similarly patients have begun to bring information collected from the Internet into their consultations with doctors.

Physicians have not tended to discuss online drug stores with their patients and even less recommend that they obtain their medicines from this source. Also, there is little expectation that they will be recommending online drugstores over the next year. The greatest awareness and recommendation of these online drugstores have come from American PCPs and, within Europe, from German PCPs.

## Pharmaceutical Companies

Pharmaceutical companies need to decide how much of their resources they should spend in developing their own company sites, their own product sites and in collaborating with third-



party medical web-sites and health portals. So, how much do doctors use these different types of sites?

Whether pharmaceutical companies should link up with health portals is currently a hot issue, yet the research findings suggest that certain initiatives have been more successful than others in bringing physicians to their sites and encouraging physicians to return to their sites on an on-going basis.

### About P\SL Research

With offices in Europe as well as North America, P\SL Research, the global leader in Internet research pertaining to medicine, is a full-service research agency focussed on international and domestic health-related markets.

P\SL's e-Research Practices are dedicated to helping our clients optimize the opportunities afforded by the Internet, by conducting research using the Internet and by conducting research about the Internet.

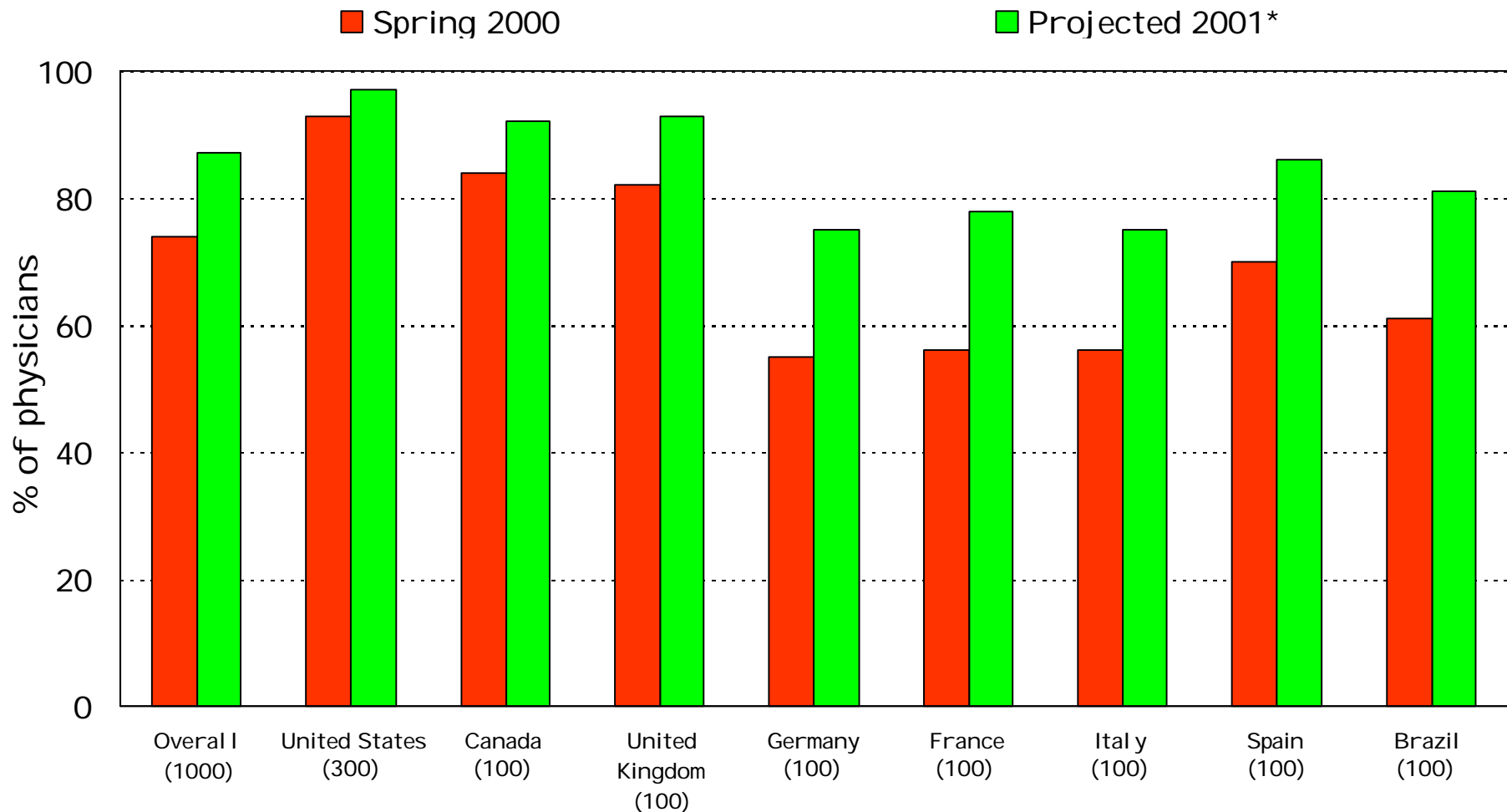
### Contact

Clients should contact Jeremy Fontana, P\SL eResearch North America ([jeremyf@pslgroup.com](mailto:jeremyf@pslgroup.com)) or Peter Winters, P\SL eResearch Europe ([peterw@pslgroup.com](mailto:peterw@pslgroup.com)) for more information about IMD 2000.

The purchased data will provide the detailed quantitative analysis on which this article is based. IMD 2000 is an ongoing program of research to quantify the international usage of the Internet by physicians.

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# PCPs Having Ever Accessed The Internet Current vs. Projected



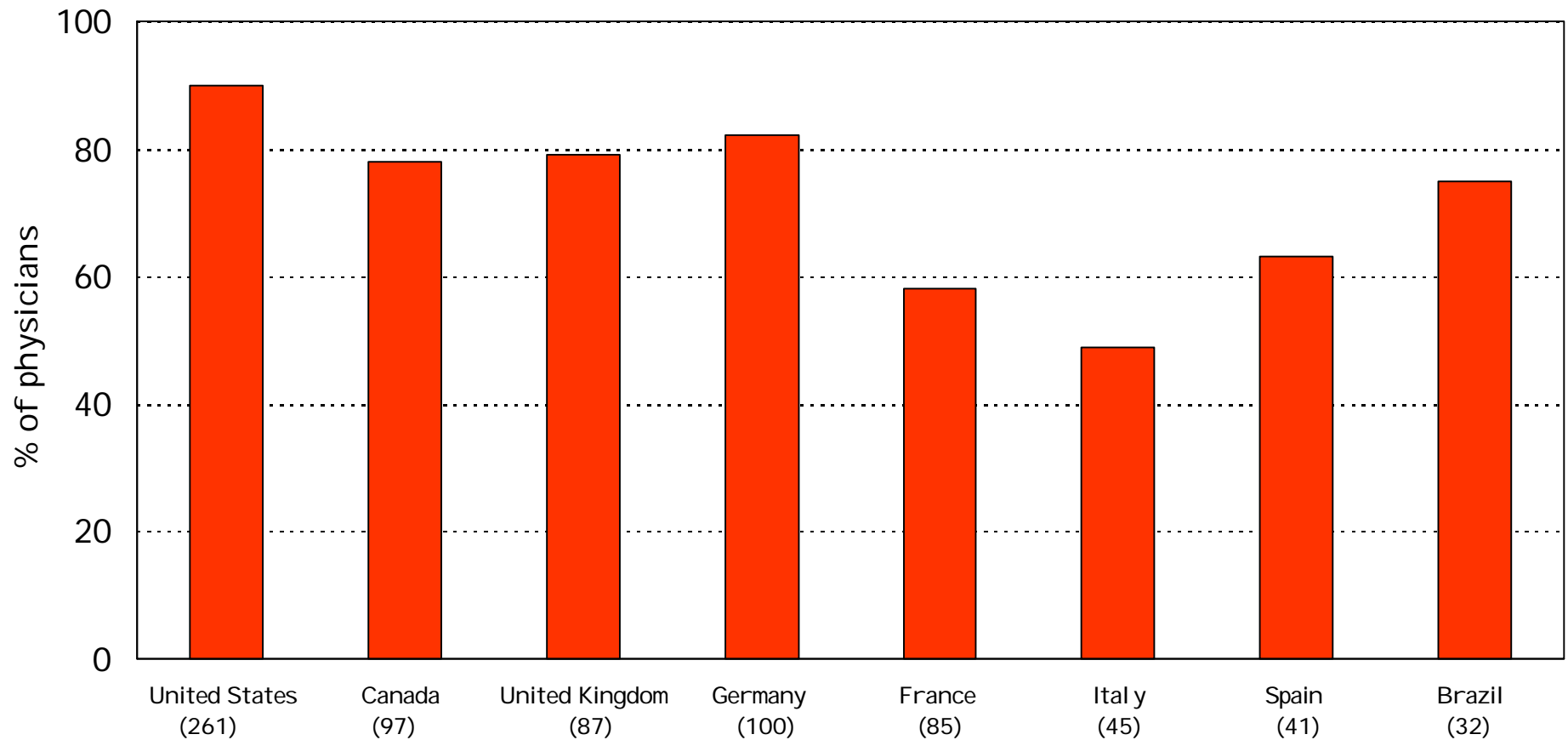
Base: All telephone PCPs

Telephone Phase Q.2a

P/S/L Research  
Spring 2000

\* Projections made based on stated future intentions and employing a deflating factor.

# PCPs Suggesting That Patients Use The Internet To Access Or Obtain Medical /Health-Related Information

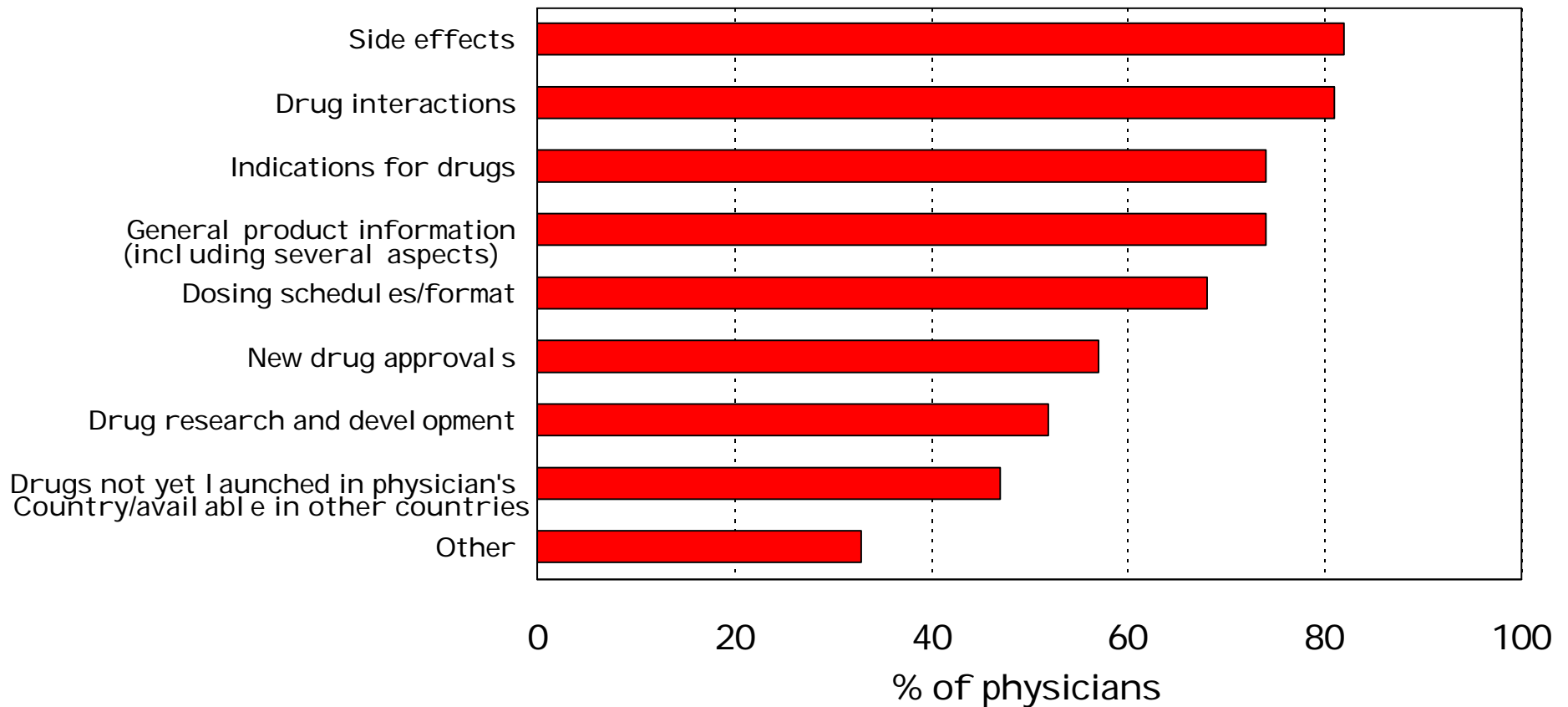


Base: All Internet PCPs

Internet Phase Q.17

P\SL Research  
Spring 2000

# PCPs Who Use The Internet To Look For Various Types Of Drug Therapy Information Overall



Base: All Internet PCPs who have accessed the Internet to obtain info on drug therapies (713)

Internet Phase Q.7

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Spring 2000