

# Hospitalists —

Profile of a growing specialty, practice trends, drugs prescribed, information needs and unique promotional opportunities



Now in progress

Hospital medicine is a growing specialty that has a great deal of influence in the selection and use of drugs in hospitals. Their demographics and role are very different from other specialties. Their drug information needs are unique and this presents a special opportunity for pharmaceutical companies that understand these differences. This study will provide you timely and relevant information about this large specialty to enhance the effectiveness of your marketing programs for products used in hospitals.

**A syndicated project proposal submitted to healthcare companies by:**

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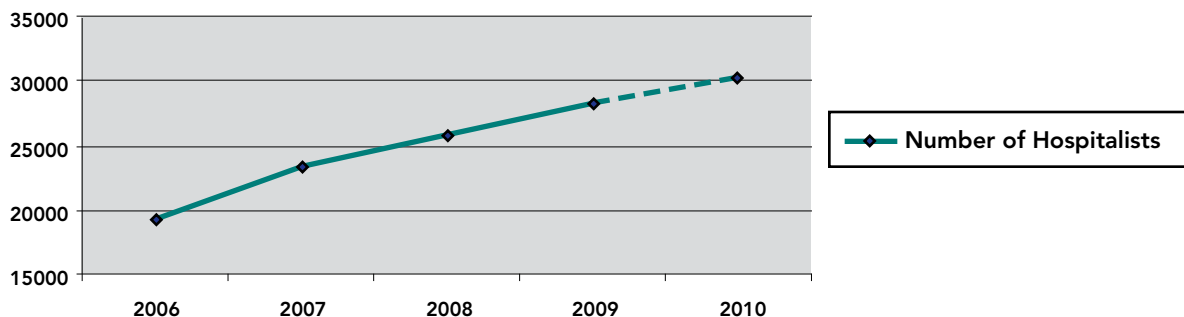
## I. Introduction – The Growing Importance of Hospitalists, Drug Categories Prescribed and Projected Growth

Hospitalists provide medical care for patients when they are in hospitals. There are currently 28,000 hospitalists in the United States and their numbers are growing rapidly. This is because:

- Growing numbers of primary care physicians (PCPs) are using them to care for their patients when they are hospitalized. Since the growth of managed care guidelines has put constraints on the incomes of PCPs, there are economic incentives for them to use hospitalists for their hospitalized patients.
- The trend towards the use of hospitalists is also supported by hospital administrators and managed care executives as they have found that use of hospitalists achieves patient discharges in a timely manner and thus reduces duration of hospital stays and, consequently, the costs of hospital stays.
- Pharmaceutical companies that have products that are used in hospitals have a lot to gain by understanding the power and the special needs of hospitalists.

To understand the profile of this specialty and learn about topics such as their practice trends, drugs prescribed by them, their special information needs and other related topics **Hospital Research Associates (HRA)** is proposing this new syndicated research study. Discussions with several clients re the topic of this study indicated a great deal of interest in obtaining this information. HRA Research is therefore proposing this project to provide this information in a cost-effective manner to several clients.

The census of hospitalists is growing and the following graph illustrates the growth:



Source: Society of Hospital Medicine, AHA, HRA estimates

Preliminary research has indicated that hospitalists frequently prescribe drugs from the following categories:

- |                 |                       |
|-----------------|-----------------------|
| Antiarrhythmics | Antithrombotics       |
| Antiasthmatics  | Anti-ulcer            |
| Antidepressants | Other cardiovasculars |
| Antidiabetics   | Sleep medication      |
| Anti-infectives | Other categories.     |

## ▶ II. Objectives of the Study

The objectives of the study will be to provide information on:

- Demographics of hospitalists and other related information on this specialty;
- Diseases and conditions commonly treated, numbers of prescriptions written and drug products prescribed frequently;
- Information needs and unique promotional opportunities.
- Role in the hospital milieu and relationship with other specialties;
- Competitive intelligence on programs of other pharmaceutical companies towards this specialty.

This will be accomplished by providing information and assessments in the following areas.

### **A. Demographics of this large and growing specialty**

1. Number of hospitalists in the US and other demographic information?
2. Types of arrangements with hospitals?
3. Typical employment structures and proportion of hospitalists in each structure?
4. Percentage of hospitals with hospitalists, breakdown by academic vs. non-teaching and other meaningful descriptors.

### **B. Role in the hospital**

1. Segmentation of hospitalists' roles in their institutions with the percentage of professionals in each segment?
2. Level of influence in selecting and changing drug therapy?
3. Power in setting drug utilization policies and procedures?

### **C. Diseases treated**

1. Quantitative data on diseases and conditions treated by hospitalists?
2. Differences, if any, in the way they treat diseases from their specialist colleagues?

### **D. Number of prescriptions written and drugs prescribed**

1. Number of prescriptions written annually?
2. Quantitative data on drugs prescribed frequently?
3. Differences, if any, in drug selection from their colleagues in comparable situations?

### **E. Information needs and unique promotional opportunities**

1. What are the unique needs of hospitalists regarding use of medications in hospitals?
2. Relevant therapeutic areas to be included in promotion?
3. Optimal frequency of promotional contacts?

### **F. Message and targeting**

1. Appropriate message content, style and format to create the needed impact?
2. Information for targeting?

### **G. Where to detail to hospitalists**

*Contrary to what may be expected many hospitalists do not have offices in hospitals.*

1. What is a good place to detail to hospitalists? Why?
2. What is their preferred format for receiving product information?

### **H. Education path**

1. What is their typical education path after medical school?
2. Teaching institutions with programs of highest regard?
3. What are their fellowship and board certification requirements?

### **I. Promotion by other pharmaceutical companies towards hospitalists**

1. Which pharmaceutical companies have promotional programs for hospitalists?
2. Which products are being promoted to them?
3. Any difference in emphasis on promotion channels?
4. Readership of Journals by Hospitalists?

### **J. Future assessments regarding hospitalists**

1. What will be the potential growth in the numbers of hospitalists?
2. How is their power and influence projected to grow?
3. What other trends with promotion relevance are expected?

*Details of the research methodology are provided in the next Section.*

**Readers are welcome to nominate other areas of research  
to add to the topics listed above**

### ▶ III. Research Methodology

Being aware of the complexities of the subject and the need to report quantitative data on the appropriate topics, a detailed methodology has been devised. It is described below.

*Prior to the initiation of the research we will discuss the project with all the sponsoring clients to get their suggestions on the research.*

#### **A. Internet research**

An exhaustive search will be conducted at the outset to gather background information on the various research topics. This will include gathering information in the following areas:

1. Demographic and other information on hospitalists and their role;
2. Various ownership structures of hospitalist groups.
3. Other study topics.

#### **B. Qualitative research – focus group interviews (2)**

We plan to conduct two focus groups with hospitalists. The objective will be gather information on the various information objectives of the project.

#### **C. Quantitative survey of hospitalists (200)**

We plan to conduct a survey of hospitalists to quantify the information obtained in the above qualitative phase. Our plan is to gather responses from 200 (two hundred) of these professionals. Questions will deal with topics such as:

- Disease categories treated by them and drugs prescribed;
- Number of prescriptions written per year;
- Special information needs and unique promotional opportunities

#### **D. Opinion leader interviews**

We will conduct a few interviews with opinion leaders from organizations such as the Society of Hospital Medicine to get their views on the future of the specialty and other related topics

#### **E. Organization and tabulation of findings**

All the information obtained in all the focus groups will be organized by the various study topics. Similarly, the quantitative findings of the patient survey will be tabulated by the different areas of investigation to facilitate analysis of the data. All the information will be analyzed to meet the informational objectives annotated in Section II of this proposal.

#### **F. Reporting of information**

The information will be presented in a well organized report. Appropriate figures and diagrams will be used to communicate the information to facilitate comprehension.

**Readers are invited to suggest additions / modifications to the above methodology to increase the usefulness of the final report to them.**

## ▶ IV. Results of Preliminary Research

Preliminary research conducted to aid in the preparation of this prospectus has revealed the following interesting information.

The rapidly growing hospitalist model of inpatient care seems destined to become the dominant model of hospital care in the U.S. according to a study published in the *Journal of American Medical Association*. The Hospitalist Movement Five Years Later”, by Researchers at UCSF Medical Center says that the hospitalist field appears to be living up to its promise to improve the efficiency and perhaps the quality of hospital care. Most of the hospitalists are at the hospital at all times and are thus accessible to the patient

Over half of US Hospitals have a hospital medicine program according to a survey conducted by the American Hospital Association. According to this study the penetration by hospitalist program is at 58 %. The number of hospitalists is estimated at 28,000 for 2009 according to this study.

There are three basic hospitalist group ownership structures—They are—hospital owned groups, private hospitalists companies that typically cover an entire hospital, or private practices that cover for various private physicians. The group structure has some impact on how hospitalists practice.

Due to the involvement of hospitalists in arranging specialist consultations the number of consultations arranged is decreasing.

Implications for Pharmaceutical Marketing—According to an article in *Pharmaceutical Representative* dated September 16, 2009 – the growth of hospitalists indicates that pharmaceutical marketers will need to pay more attention to these specialists. Medical representatives will need to arm themselves with information about hospitalists and what they care about when interacting with representatives. According to the same article, hospitalists want to know what does the product do, see proof of how well it works and be informed about any precautions associated with its use.

Role in Ordering Medications—When patients are admitted to hospitals the hospitalist becomes their physician of record. The same is true for patients admitted through emergency rooms who do not have their own physicians. They review patient medications and write new medication orders for them. At that time he may change some of the products he may deem unsuitable for them. This is another reason for pharmaceutical companies to promote to hospitalists.

Counter-point: There is a counter point that also needs to be kept in mind in researching hospitalists. According to an article in the *New England Journal of Medicine* dated December 20, 2007 -- there has been some concern that fragmenting the care through the use of hospitalists could lead to more medical errors and dissatisfied patients.

## V. Uses of the Report

There are six major uses of the report as envisioned by us:

- A. To understand the role, demographics and details of the practice of hospitalists to be able to use the information to prepare special marketing programs for this specialty.
- B. To be informed about the diseases treated and products used by this specialty to make appropriate selection of brands from your company's product line for special promotional emphasis to hospitalists.
- C. To understand the special product and informational needs of hospitalists to use this information in preparing marketing programs for these professionals.
- D. For being apprised about competitive promotional activities directed towards this group so appropriate counter measures can be developed.
- E. To train your sales representatives regarding this specialty, nuances of detailing to them and information about production sought by their physicians.
- F. To gain a perspective regarding the projected future of this specialty so that adequate rationale can be articulated for justifying the investment in cultivating a rapport with this group.

Individual companies will be able to employ the report for additional uses depending on their specific situation.

## VI. Project Schedule

Having received the sufficient number of sponsorships the project has been launched and is currently in progress at HRA Research. The first focus group will take place in Philadelphia in the second week of December.

The second focus group, the questionnaire survey, data tabulation and the opinion leader interviews will take place in the months of January and February. This will be followed by analysis and report preparation in the month of March. Following this the report will be released in the first week of April.

## VII. Project Deliverables

The following four deliverables are included in your purchase.

- A. Copy of the project report in PDF file and CD-ROM.



- B. Comprehensive presentation of the findings of the project after submission of the report.



- C. Two bound copies of the report.



- D. A PowerPoint file containing major findings of the report.



**An overview sales presentation on this project can be provided in a teleconference or in-person at your company. If you are interested in arranging this presentation, please contact us per the information provided at the end of this brochure.**

## VIII. Credentials and Experience

HRA Research is a well established life sciences marketing research company that has been in operation for 30 years. The company has over 40 market research professionals. One of the company's special strength is its in-house data collection facilities through the use of convention, telephone and Internet research. To date, the company has completed hundreds of projects spanning all therapeutic categories and care settings. HRA has conducted projects for all major pharmaceutical and medical product companies.

### The Project Team:

The project will be executed by a team of specialists employed by HRA and having substantial experience in pharmaceutical and physician specialty research.

The Project Leader will be *Dilip Phadnis*. To date Dilip has conducted over 50 major syndicated projects in the pharmaceutical industry. He has conducted pioneering projects studying many trends in the pharmaceutical industry such as Growth of Managed Care, Acceptance of e-promotion, Nursing Home Pharmaceutical Market, New Product Launch Strategies and others. Dilip has over 25 years experience in strategic pharmaceutical market research. He has a B.Pharm and a MBA degree.

*John Mitchell*, Director of research will be heading the research for this project. John has twenty years experience in marketing research on both client and agency side including several years at **Sanofi-Aventis** where he was Senior Manager of Marketing research.

Also part of the project team will be a Research Manager responsible for collection of the data and preliminary analysis of the same.

### Experience in Syndicated Projects:

HRA has conducted many syndicated projects in several therapeutic categories. Some of the leading titles are:

Medical Trends in Hospital Formulary Committees  
Medical Trends in Hospital Catheterization Laboratories  
Medical Trends in Acute Stroke Market

### In-house Data Collection and Tabulation Expertise

Due to our in-house capabilities the data collection for this project will be conducted in-house ensuring complete compliance with research specifications. Availability of in-house coding and tabulation services will ensure that all the data processing will take place exactly per specifications and additional sub-analysis can be provided if required.

**Additional information on HRA Research is available and can be provided upon request.**