OneKey

Market Profile of U.S. Cardiologists

OneKey Market Insight Report

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Market Profile of U.S. Cardiologists

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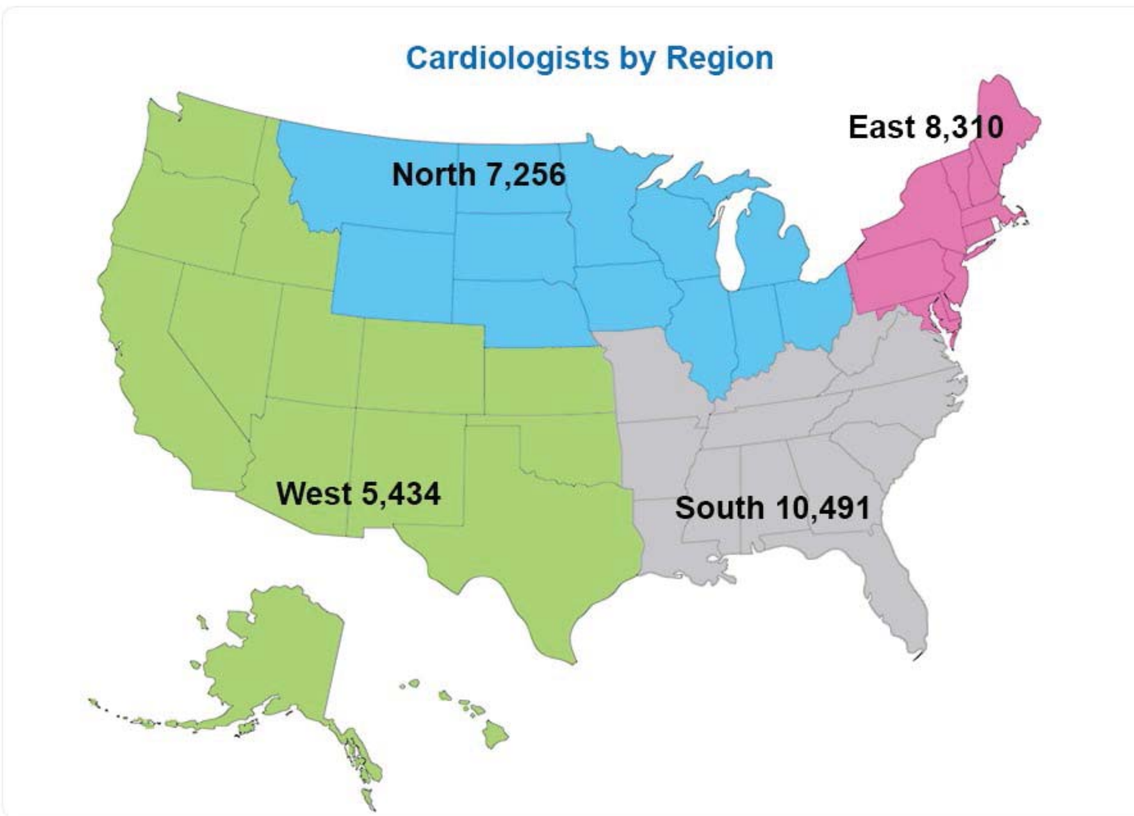
Introduction

Cardiologists are viewed as important stakeholders with expanding influence when it comes to heart health and disease prevention. As licensed physicians who are trained in treating the heart and blood circulation system, cardiologists conduct diagnostic tests and then proceed accordingly to treat the condition at hand. Cardiologists may recommend treatment and preventive methods for stopping the onset of some of the more dangerous heart conditions. Additionally, they will be the primary source of information about a patient to a surgeon, should the patient need a procedure. The following information is drawn from the OneKey reference database of healthcare practitioners, organizations and affiliations to provide current profile characteristics and other insights related to the practice of cardiology.

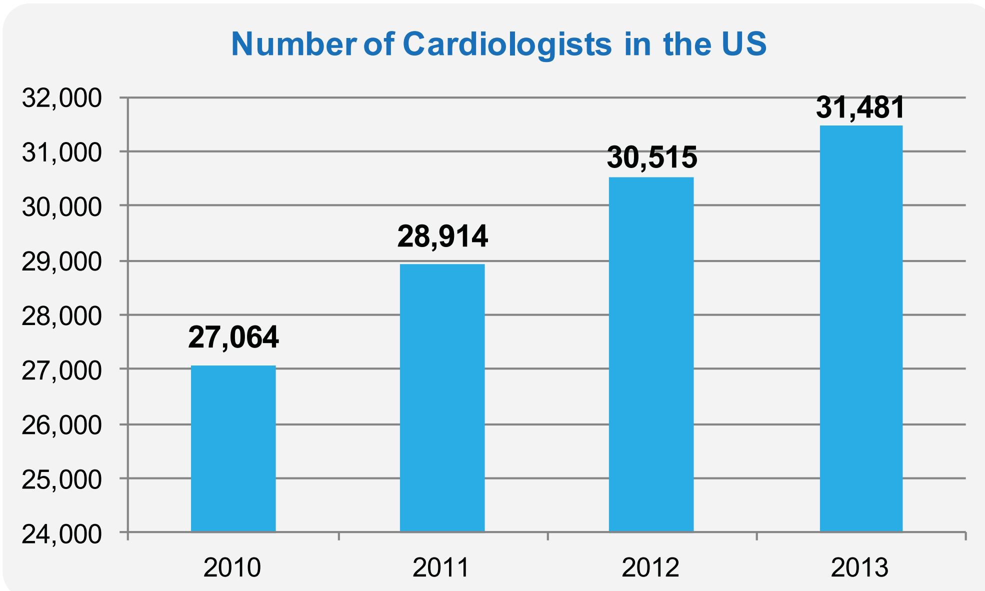
Overview: Marketing to U.S. Cardiologists

The number of cardiologists in the U.S. has been on the rise for the past four years. There are nearly 31,500 cardiologists practicing and prescribing nationwide today. The southern states have the highest concentration of cardiologists; almost double the number of physicians in the western states.



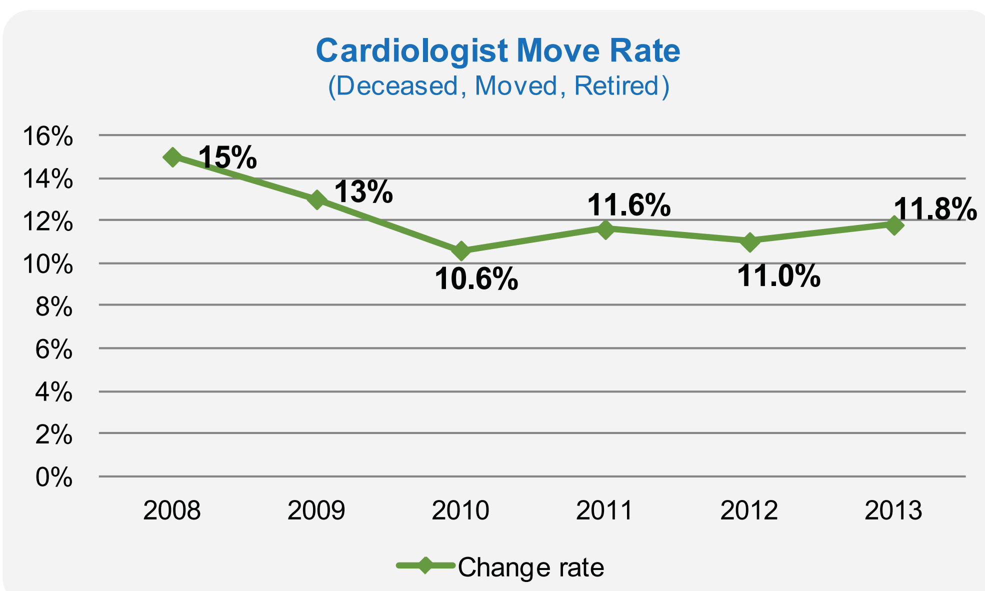
Source: Cegedim Relationship Management OneKey Database, March 2013

In 2013, the number of practicing cardiologists in the U.S. increased by more than 16 percent from 2010. This growth is reflective of consumer awareness of heart disease and demand for examinations, consultations and preventative treatment.



Source: Cegedim Relationship Management OneKey Database, March 2013

Cardiologist move to new locations, change jobs, retire, or pass away at an average rate of 12 percent per year, with more stability noted in the past three years. Cardiologists' move-rate is in line with the average move rate of all physicians, which was 12.3 percent as of April 2013.

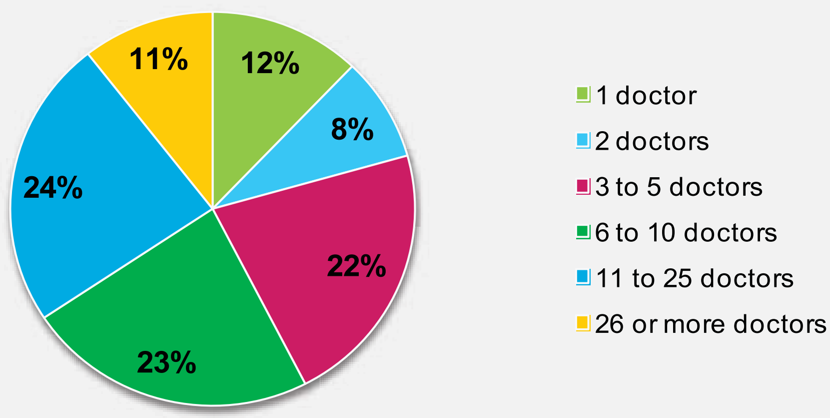


Source: Cegedim Relationship Management OneKey Database, March 2013

Practice Size and Patient Volume

Only 12 percent of cardiologists are solo practitioners and over half of cardiologists (55%) practice in mid to large-size offices or groups with at least six other physicians.

Medical Office Size of Cardiologist

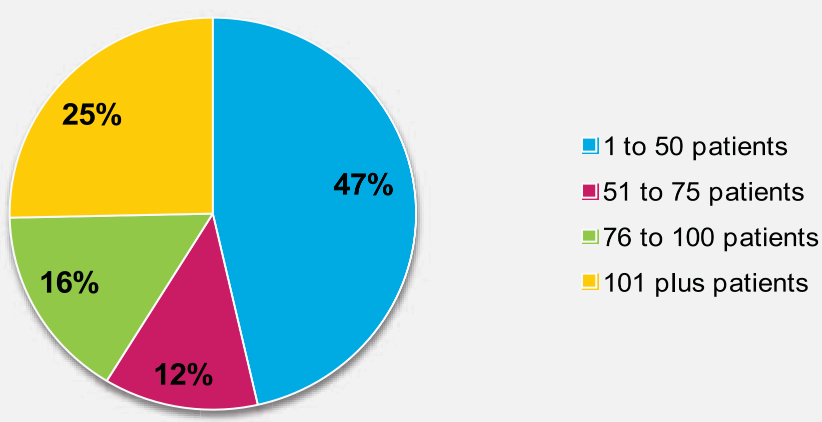


Office Size (No. of Doctors)	1	2	3 to 5	6 to 10	11 to 25	26 or more	Total
Total	3817	2682	6858	7316	7481	3327	31481

Source: Cegedim Relationship Management OneKey Database, March 2013

Cardiology offices vary distinctly in patient volume. Nearly half of cardiology offices see 50 patients or fewer daily while a quarter of the offices receive over 100 patients. The mid-range of 51 to 100 daily patient visits is represented in 28 percent of practices.

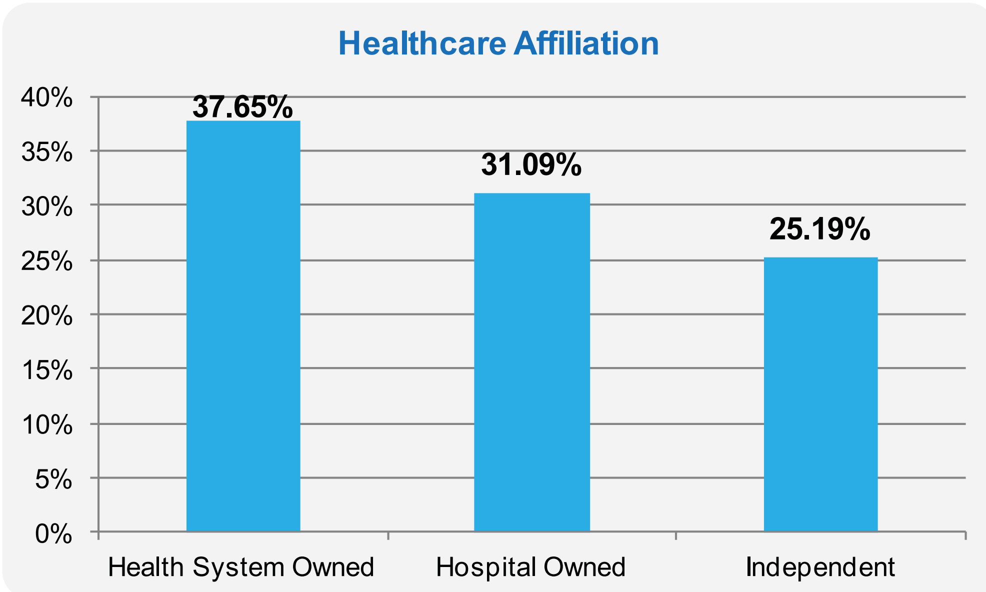
Daily Patient Volume



Source: Cegedim Relationship Management OneKey Database, March 2013

Affiliations and Specialty Associations

Only a quarter of cardiologists practice in independently owned medical offices while most operate in a worksite owned by a hospital or healthcare system. Like other physicians, cardiologists are being enticed to sell their practices and work under the umbrella of integrated healthcare systems.



Source: Cegedim Relationship Management OneKey Database, March 2013

Affiliations to Hospitals for Admitting Privileges

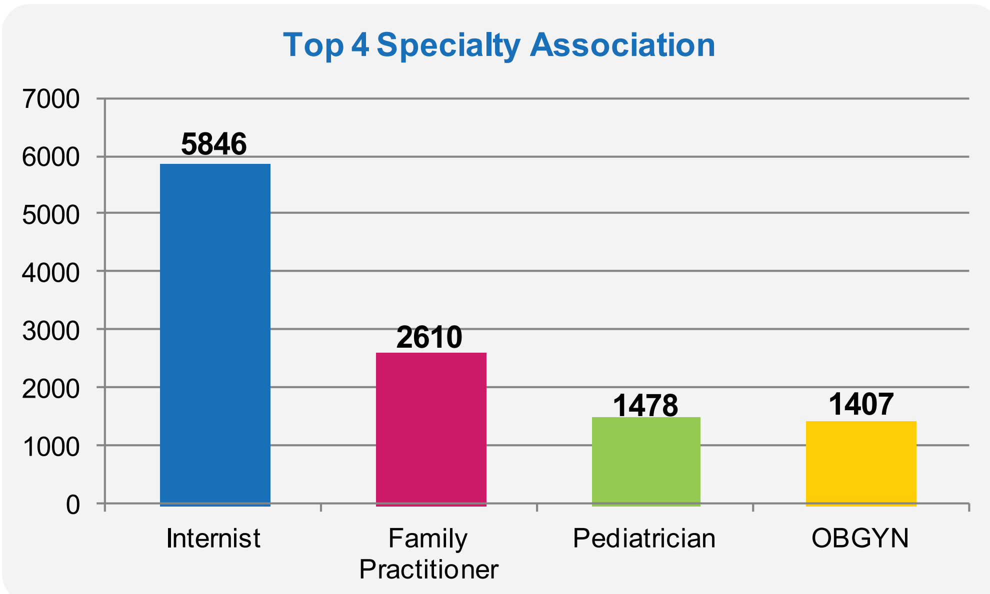
Cardiologists are familiar faces in hospitals. More than 94 percent of cardiologists have patient admitting privileges at hospitals, and about 30 percent are making the rounds at three or more hospitals.

Affiliations to Hospitals	No. of Doctors	% of total
0	1,792	5.69%
1	10,467	33.25%
2	9,879	31.38%
3	5,482	17.41%
4	3,861	12.26%
Total	31,481	100.00%

Source: Cegedim Relationship Management OneKey Database, March 2013

Top 4 Specialty Association

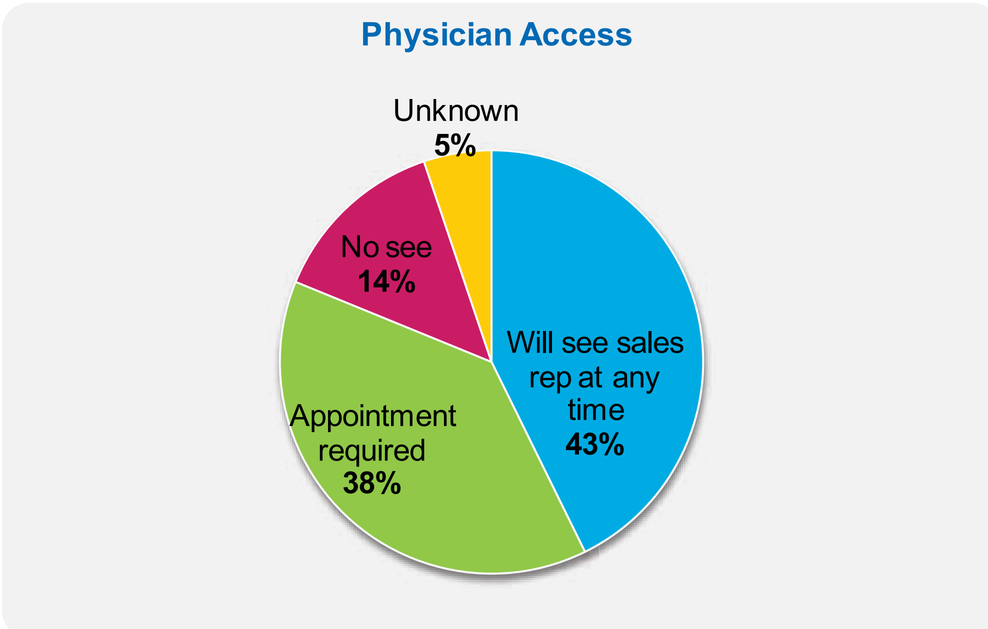
Since cardiology is considered an internal medicine subspecialty, it is not unusual to see that the top practice specialty associated with cardiology is internal medicine; more than 18 percent of all cardiologists (5,846) practice with at least one internist in the same medical office. Similarly, cardiologists are also likely to be paired with general practitioners (GPs) in the same location. About 2,610 cardiologists work with family doctors; 1,478 with pediatricians; and 1,407 with OB/GYNs. Referrals to cardiologists are most likely to come from these GPs whose arterial examinations are often the first line of discovery of adverse heart conditions. Knowing these associations to cardiology will help commercial teams streamline call plans and product presentations.



Source: Cegedim Relationship Management OneKey Database, March 2013

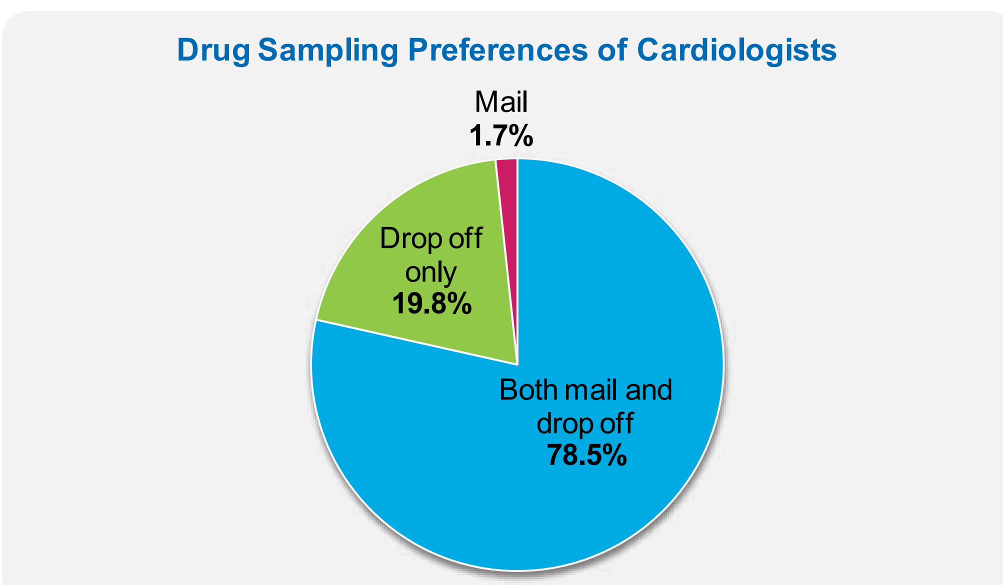
Physician Access and Drug Sample Acceptance Rates

Nearly 14 percent of cardiologists do not see pharmaceutical or medical-device sales reps, while 43 percent will see reps at any time. About 38 percent require appointments to be made in advance.



Source: Cegedim Relationship Management OneKey Database, March 2013

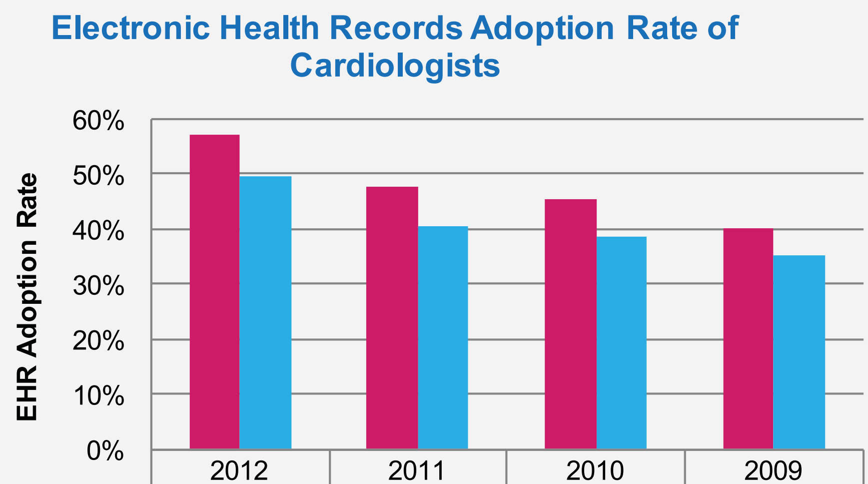
Compared to other specialties, cardiologists have a relatively high drug sample acceptance rate, ranking 17 out of 56 specialties surveyed by OneKey in 2012. Over 80 percent of cardiologists accept drug samples and of those who do, over 78 percent are open to having sales reps drop off the samples.



Source: Cegedim Relationship Management OneKey Database, March 2013

Adoption of Electronic Health Records in Cardiology Practices

Cardiologists are more likely to adopt electronic health records than the general physician community, according to OneKey's ongoing survey of technology trends in medical practices. From 2009 to 2012 cardiologists' adoption rate jumped 17 percentage points to 57 percent. Cardiologists are transitioning from paper records to take advantage of government reimbursements. Their EHR purchases include systems for ePrescribing, eNotes and eLabs/Xrays.



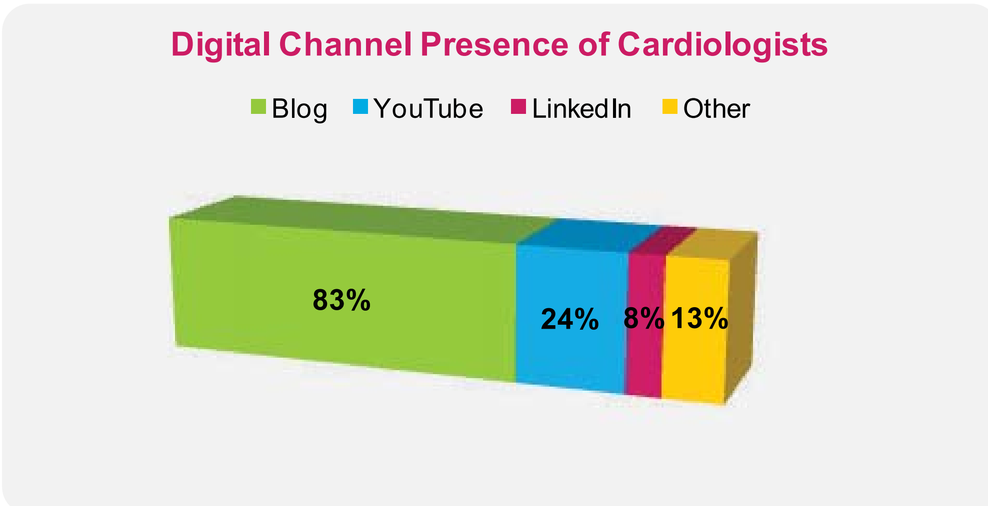
	2012	2011	2010	2009
Cardiologists	57.0%	47.7%	45.6%	40.0%
All Physicians	49.6%	40.4%	38.7%	35.4%

Source: Cegedim Relationship Management OneKey Database, March 2013

Digital and Social Media Profile of U.S. Cardiologists

Digital Channel Presence

Physicians are increasingly present in social channels. About 26 percent of cardiologists are online and participating in social media. Cardiologists who are online have a strong presence in blogs, with 83 percent reading, writing or commenting on blogs.



Source: Cegedim Relationship Management OneKey Database, March 2013

Digital Marketing: Email Open Rates of Cardiologists

With the difficulty in reaching low-access and no-access physicians, email has gained favor as a communications channel. Cardiologists, however, are less likely to be receptive to email than their colleagues. According to OneKey's Email Performance Archive for 2012, cardiologists rank at the bottom of the list of those physicians with whom they are most often paired in practices. The annualized open rate for cardiologists in 2012 was 4.10 percent compared to pediatricians who were near 7 percent. The average open rate for all physicians in 2012 was 4.5 percent.

Specialty	1st Half	2nd Half	Annualized
Pediatrician	4.02%	9.82%	6.92%
Family Practitioner	3.17%	6.94%	5.06%
Internist	3.40%	5.74%	4.57%
OB/GYN	3.75%	5.24%	4.50%
Cardiologist	4.04%	4.15%	4.10%

Source: Cegedim Relationship Management OneKey Database, March 2013

Physician Access and Drug Sample Acceptance Rates of Digitally Active Cardiologists

Digitally active cardiologists are slightly less likely to grant access to sales reps or accept drug samples in their offices, compared to their peers who are not online. These finding indicate social media will have an impact on personal promotion strategies targeted to cardiologists.

	Digitally Active		Not Digitally Active	
Physician Access / Drug Acceptance	% Yes	% No	% Yes	% No
Cardiologist will see sales reps	71.4%	28.6%	75.9%	24.1%
Cardiologists will accept drug samples	62.2%	37.8%	68.4%	31.6%

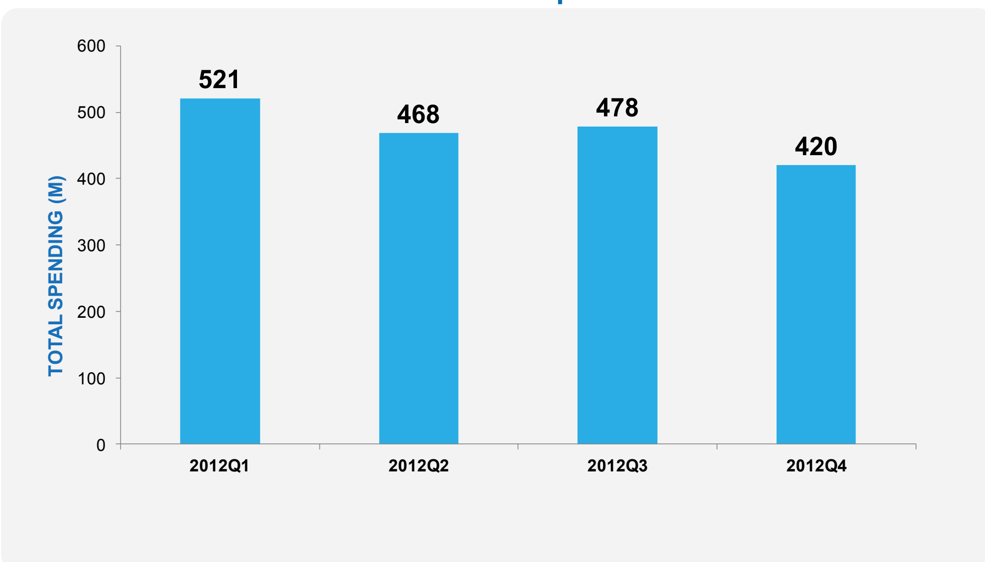
Source: Cegedim Relationship Management OneKey Database, March 2013

Market Focus: Promotional Spend of C10A Class Drugs in 2012

Total Market Spend in 2012

The pharmaceutical industry spent over $27 billion on promotions in 2012. Cardiovascular products accounted for 16 percent of total promotional spend, making it the second largest spender of all therapeutic classes. C10A class products (lipid modifying agents, plain) accounted for nearly half of total promotion expenditures of cardiovascular products with a total spend of over $1.8 billion in 2012.

Total Market Spend

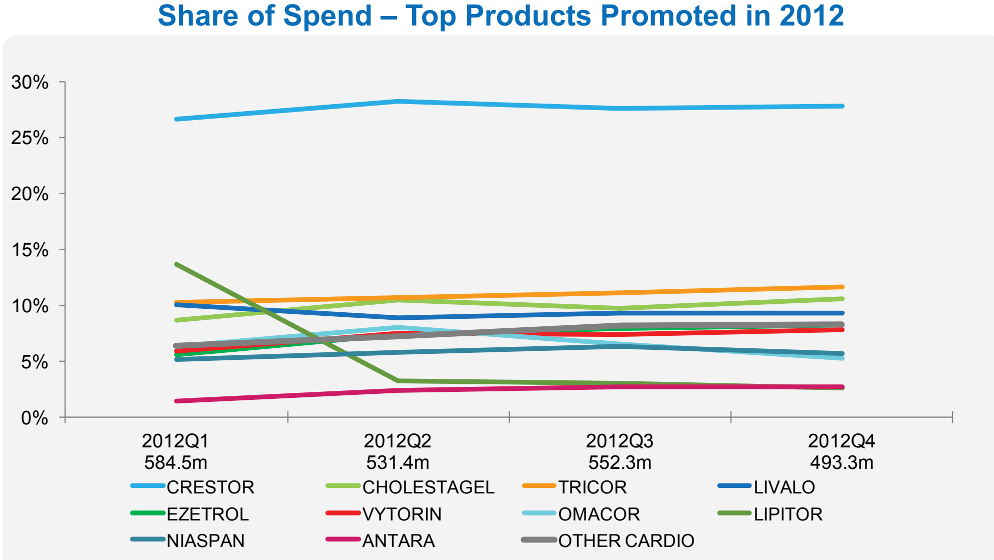


Source: Cegedim Strategic Data, U.S. Promotion Database, January 2013

Share of Spend of Top 11 Cardiovascular Products in 2012

Crestor was the top cardiovascular product (cholesterol and triglycerides) promoted to physicians in 2012 and also the fourth most promoted among all drug brands (all therapeutic areas).

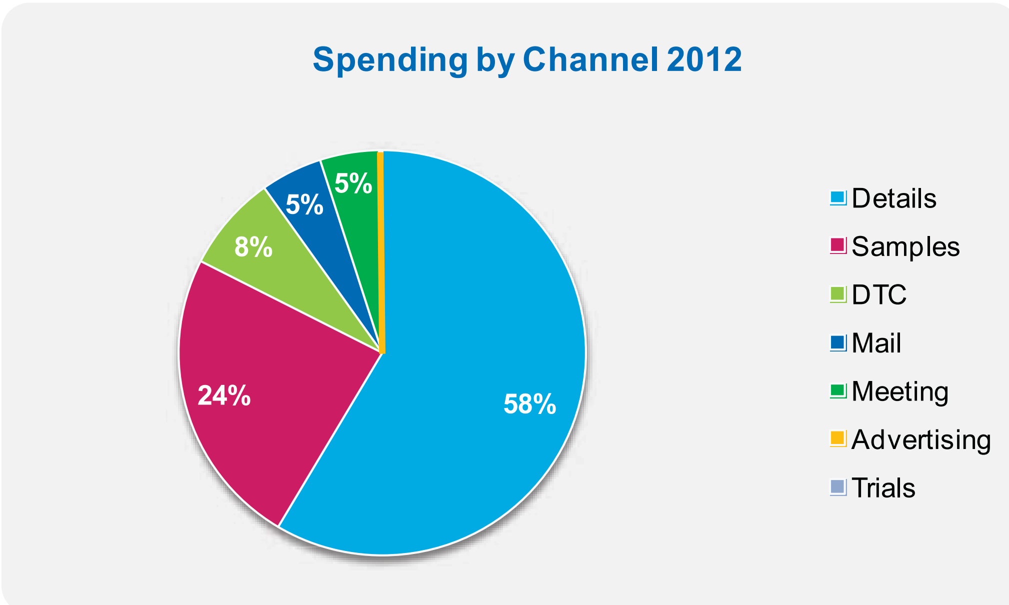
Share of Spend – Top Products Promoted in 2012



Source: Cegedim Strategic Data, U.S. Promotion Database, January 2013

Channel Mix – Details, Samples and Meetings

In terms of personal and non-personal promotion mix, cardiovascular drug manufacturers favored detailing and sampling over other promotional channels. Advertising was the least utilized promotional channel.



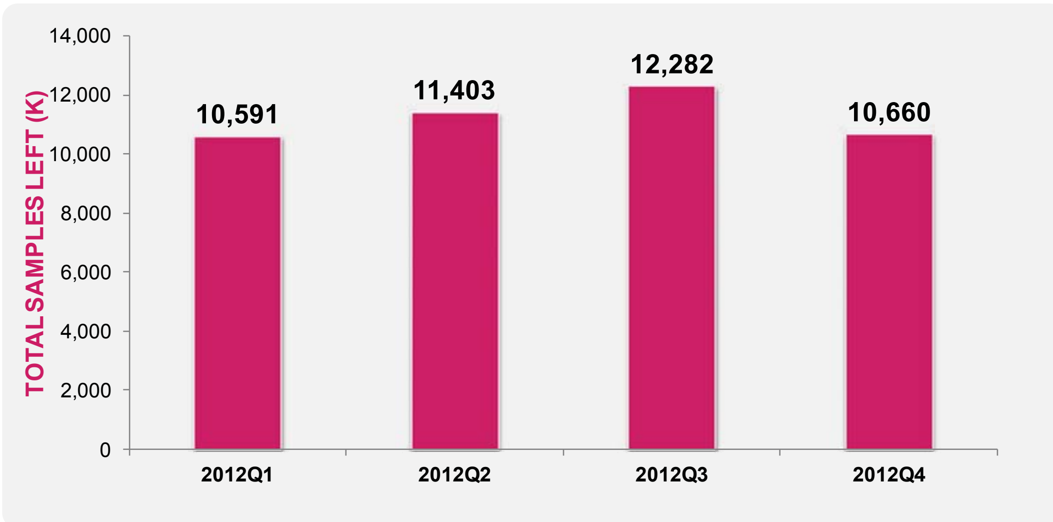
Source: Cegedim Strategic Data, U.S. Promotion Database, January 2013

Detailing was the top promotional channel, accounting for more than half of total promotional spend. Over 10.2 million details were presented to prescribers during the four quarters of 2012.

Source: Cegedim Strategic Data, U.S. Promotion Database, January 2013

Drug samples for patients accounted for nearly a quarter of total promotional spend. Nearly 50 million samples were distributed to physicians in medical offices during 2012, with the highest volume occurring in the third quarter.

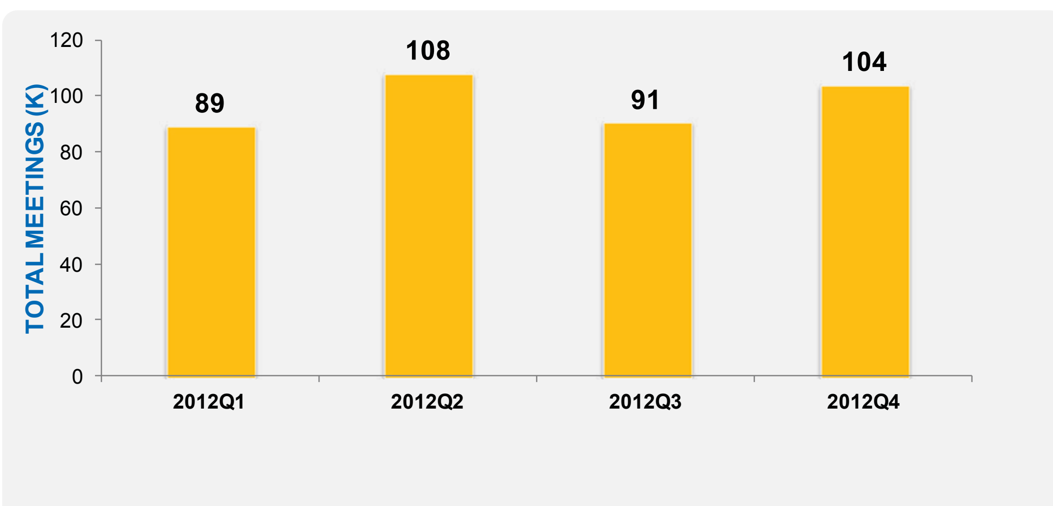
Total Samples Left



Source: Cegedim Strategic Data, U.S. Promotion Database, January 2013

Meetings were the third most utilized channel in terms of non-DTC promotion, with over 392,000 sponsored educational meetings for prescribers and mid-levels taking place in 2012.

Total Meetings



Source: Cegedim Strategic Data, U.S. Promotion Database, January 2013

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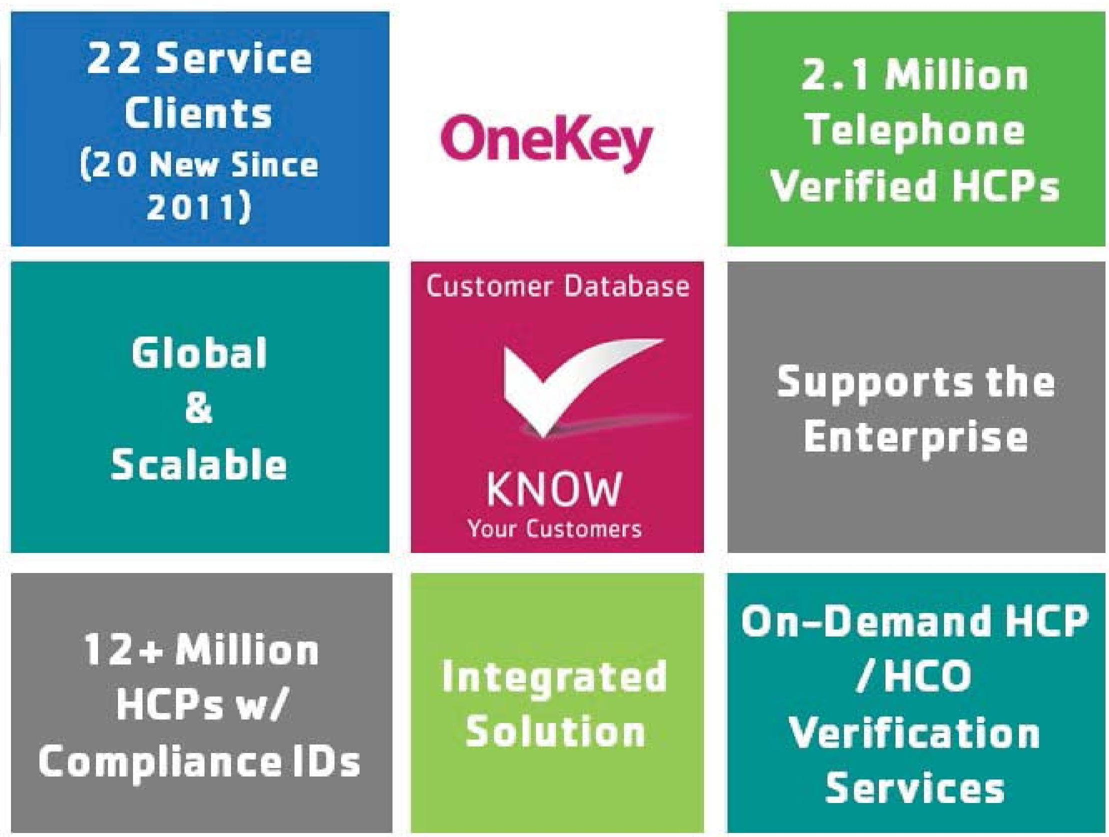

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