

NO-ACCESS TO PHYSICIANS

A Statistical Look into the Common Plight of US Medical Commercial Teams



Table Of Contents

Introduction	01
The Overall Percentage of Physician's Availability to Medical Sales Representatives	01
Accessibility of Physicians By Practice Specialties	02
Accessibility of Physicians By Region and By State	03
Accessibility of Physicians By Ownership	04
Accessibility of Physicians By Patient Volume	05
Accessibility of Physicians By Office Size	05
About Us	06

Introduction

Gone are the days when physicians were readily available to sales representatives for establishing a commercial interaction. Be it due to rising demand for quality care or increased restriction and control on product uptake by the health system in which they work, the majority of physicians in the US are limiting their time with sales executives from the industry. This fact is evident in the statistics that unveils how the percentage of doctors who marked themselves as 'no access' physicians for commercial visits have increased from 36.5 percent to 40.6 percent over a 14 month period in the recent years.

Based on an industry survey conducted by QuintilesIMS, here are some insights on the availability of physicians across the US that will help sales reps in understanding the current trends and guide them planning strategies accordingly for their next interaction with the physician.

The Overall Percentage of Physician's Availability to Medical Sales Representatives

Conveying marketing messages or promoting medical products and services have become a challenging task for sales representatives in the healthcare industry. More than strategizing how they would put forward their sales pitch, they need to put more effort in obtaining a physician's appointment for a business talk. The strict control by the healthcare organization and the industry regulations has greatly impacted the attitude of doctors and physicians towards any commercial interaction. As a result of which, it is expected that by 2019 the industry would get rid of face-to-face engagement and shift towards digital communications entirely.

Go through the following statistical chart for a better understanding of the changing trend:

	Dec-2011	Dec-2011	Dec-2013	Dec-2014	June-2016	Aug-2017
Access Permitted						
No Access	22.8%	26.6%	27.8%	31.9%	36.5%	40.6%
Appointment Required/Preferred	50.1%	37.9%	40.8%	39.7%	35.2%	33.8%

Accessibility of Physicians By Practice Specialties

There are more than 100 specialties in the profession of physicians with varying statistics regarding patient volume, practice size, revenue earnings, level of urgency, and more. When it comes to finding out how accessible these physicians are to sales reps from the medical industry, we have concluded based that general surgeons are the one with highest no-see percentage as compared to other general practitioners (GPs).

PHYSICIANS ACCESS, BY PRACTICE SPECIALITY

	Dec-2013		Dec-2014		June-2016		Aug-2017	
	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required
General Practitioners								
Pediatrician	15.5%	39.3%	17.4%	40.4%	22.3%	35.7%	26.6%	34.6%
Family Practitioner	18.9%	33.4%	22.2%	34.8%	27.1%	31.5%	32.2%	30.6%
Internist	21.9%	34.1%	28.5%	34.1%	34.0%	30.8%	38.7%	30.0%
General Practitioner	23.1%	35.4%	27.4%	35.2%	30.9%	30.4%	28.7%	29.0%
General Surgeon	32.5%	50.7%	39.5%	45.2%	44.2%	40.1%	48.6%	36.9%
Average of GP	22.4%	38.6%	27.0%	37.9%	31.7%	33.7%	35.0%	32.2%

Accessibility of Physicians By Region and By State

Spread across various geographic locations, physicians practice is not restricted to any region or state with increased emphasis being given to quality care. They are found working in different healthcare systems and facility centers located all over the United States of America. The metrics pertaining to their availability to sales executives for commercial purpose is represented in the below chart:

PHYSICIAN ACCESS, BY STATE

Dec-2014			June-2016			Aug-2017		
No Access		Appnt. Required	No Access		Appnt. Required	No Access		Appnt. Required
Top 3 States			Top 3 States			Top 3 States		
Vermont	56.9%	23.8%	Vermont	63.7%	20.9%	Vermont	67.8%	19.3%
Maine	55.4%	26.6%	Minnesota	59.6%	28.8%	Minnesota	62.6%	27.3%
Minnesota	54.2%	35.2%	Maine	56.9%	23.4%	Maine	60.7%	23.0%
Bottom 3 States			Bottom 3 States			Bottom 3 States		
Louisiana	22.6%	42.1%	North Dakota	26.6%	52.6%	New Jersey	30.7%	35.9%
New Jersey	22.4%	41.1%	New Jersey	26.0%	37.5%	North Dakota	30.4%	51.6%
Mississippi	19.9%	47.3%	Mississippi	24.6%	40.7%	Mississippi	27.7%	40.8%

PHYSICIAN ACCESS, BY REGION

	Dec- 2013		Dec- 2014		June- 2016		Aug- 2017	
	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required
West	34.6%	38.1%	37.7%	38.0%	42.4%	33.2%	45.9%	32.1%
East	28.6%	40.5%	32.6%	39.1%	37.5%	34.1%	41.9%	32.9%
North	29.4%	40.7%	33.6%	39.7%	38.2%	35.1%	42.8%	33.5%
South	21.7%	42.9%	26.6%	41.4%	30.9%	37.4%	35.4%	35.6%

Accessibility of Physicians By Ownership

Earlier, most of the physicians used to practice only in a hospital setting. But the trend has drastically changed over the years as more and more physicians are running private practices along with working in one or more health systems and hospitals simultaneously.

Have a look at the below chart for more insight:

PHYSICIAN ACCESS, BY SITE OWNERSHIP

	Dec- 2013		Dec- 2014		June- 2016		Aug- 2017	
	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required
Hospital Owned	41.2%	38.5%	45.7%	37.1%	53.2%	31.2%	57.1%	29.3%
Non Hospital Owned	23.6%	41.5%	27.0%	40.7%	31.2%	36.5%	35.9%	35.1%
Health System Owned	46.4%	36.9%	46.8%	36.6%	52.1%	31.5%	55.2%	30.0%
Non Health System Owned	21.2%	42.2%	24.3%	41.3%	27.5%	37.3%	31.4%	36.2%

Accessibility of Physicians By Patient Volume

The way patient volume differs from one physician to another. Similarly, the no-access rate of physicians too changes and the trend has been recorded and represented in the below statistical table:

PHYSICIAN ACCESS, BY DAILY PATIENT VOLUME

	Dec- 2013		Dec- 2014		June- 2016		Aug- 2017	
	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required
1 to 10 Patients	29.7%	43.0%	37.3%	39.9%	43.2%	33.5%	47.2%	31.6%
11 to 20 Patients	20.5%	42.3%	27.3%	40.3%	33.2%	34.1%	37.4%	32.1%
21 to 30 Patients	17.2%	41.7%	23.0%	40.2%	28.8%	34.8%	33.3%	32.7%
31 to 40 Patients	18.0%	41.2%	22.0%	41.0%	26.8%	36.0%	30.6%	35.4%
41 to 50 Patients	21.1%	41.7%	25.4%	41.0%	30.6%	35.8%	33.0%	35.5%
51 to 75 Patients	20.1%	41.5%	23.3%	41.3%	28.2%	36.8%	30.0%	37.2%
76 to 100 Patients	27.1%	42.0%	29.3%	42.2%	33.4%	37.9%	31.4%	39.9%

Accessibility of Physicians By Office Size

The survey conducted among physicians working in the offices of different sizes revealed that based on the size of the hospital or the health system, the availability percentage of doctors too varied and the below statistical chart projects the same.

PHYSICIAN ACCESS, BY OFFICE SIZE

	Dec- 2013		Dec- 2014		June- 2016		Aug- 2017	
	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required	No Access	Appnt. Required
Office Size: 1 to 2 Dr's	13.6%	39.8%	20.7%	38.1%	26.6%	32.9%	33.5%	30.1%
Office Size: 3 to 5 Dr's	18.5%	42.4%	24.6%	41.0%	29.8%	35.9%	35.0%	33.9%
Office Size: 6 to 10 Dr's	29.1%	45.3%	31.3%	45.3%	35.8%	40.3%	36.9%	39.8%
Office Size: 10 Plus Dr's	52.9%	36.9%	54.1%	36.0%	56.9%	33.3%	57.0%	33.5%

About Us



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