



Screen to Script

The Doctor's Digital Path to Treatment

Google/Manhattan Research

U.S.

June 2012



The best of times, the worst of times

Several forces have given rise to rapid digital adoption



The best of times, the worst of times

Several forces have given rise to rapid digital adoption

A few key outcomes

- Shift to e-resources and information on demand
- Mass adoption of EMR, e-prescribing
- Streamlined practice, patient collaboration



Background and methodology

What were the study objectives?

The overarching study objective was to reassess physicians' digital adoption across devices and media channels, and to ascertain their use and resulting impact.

How many respondents were surveyed?

The survey included a total of 506 U.S. practicing physicians.

How was the survey conducted?

The survey was conducted online, with supplemental qualitative interviews.

When was the survey fielded?

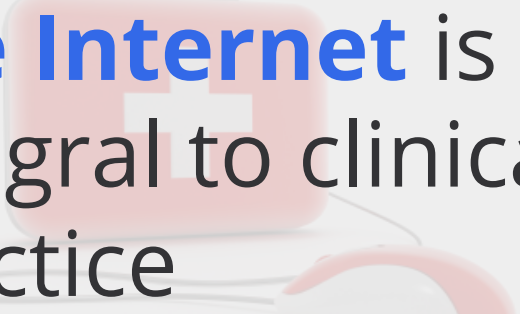
The survey was fielded in February and March 2012.

How do survey participants compare to the overall physician population?

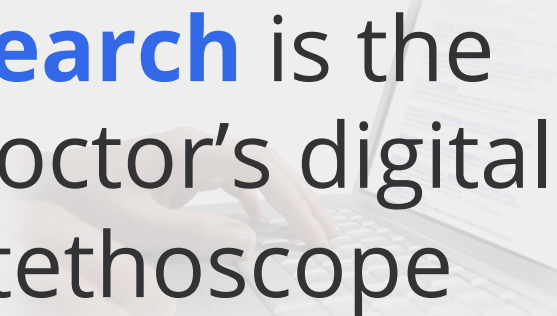
The final data set is compared to the known national universe of practicing U.S. physicians by age, gender, region, practice setting, and specialty. Manhattan Research can state with confidence that the sample is reflective of the overall population of U.S. practicing physicians today.



What did we find?



The Internet is integral to clinical practice



Search is the doctor's digital stethoscope



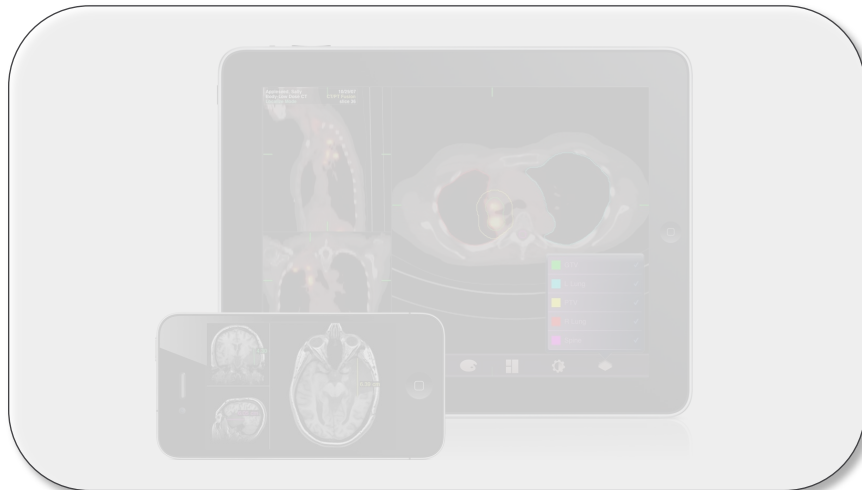
Medicine is **mobile**



Online video is an educational tool

What did we find?

The Internet is
integral to clinical
practice



Medicine is multiscreen

Percent that use device in their practice



99%
desktop or laptop



84%
smartphone

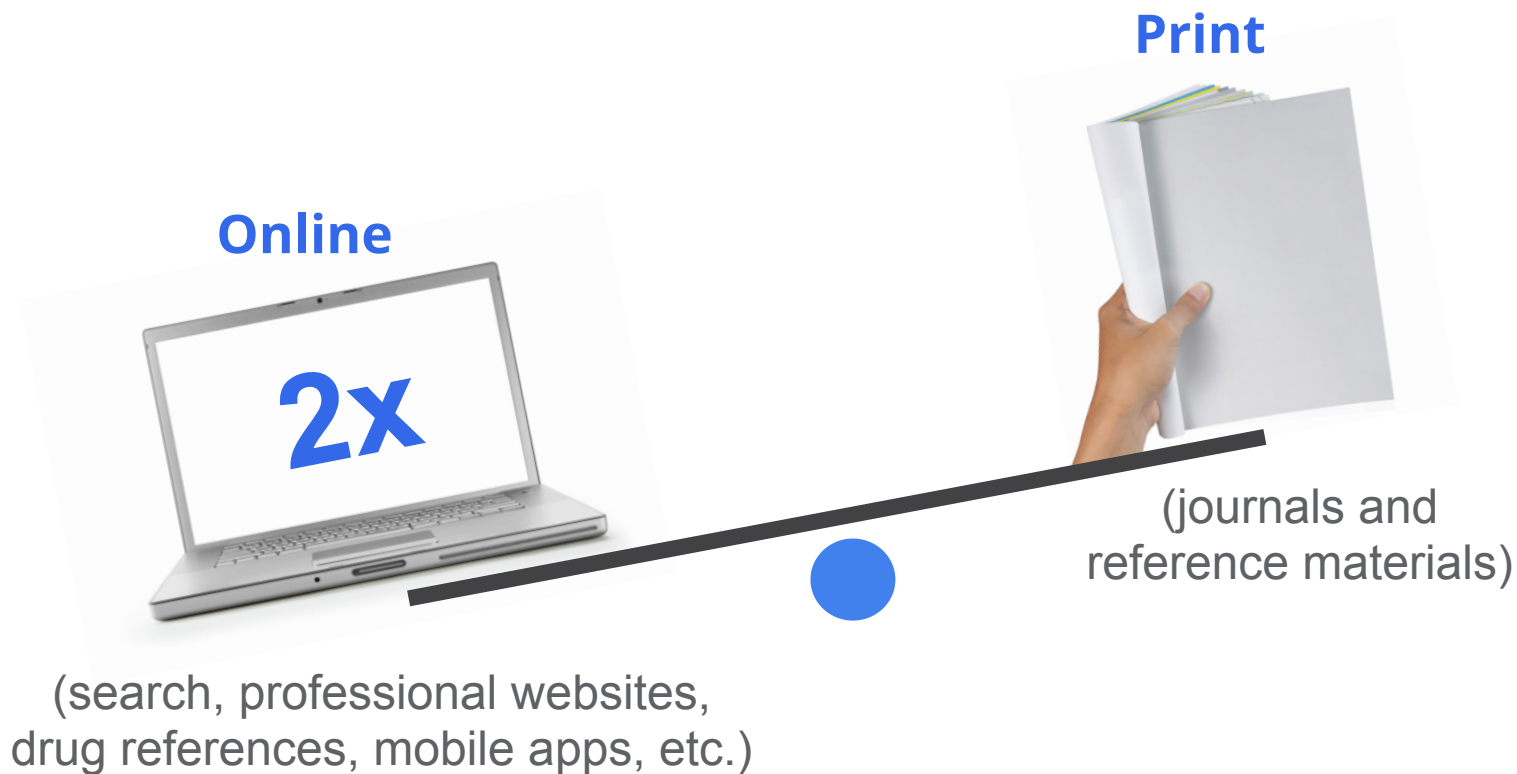


54%
own a tablet

**87% use a smartphone
or a tablet**

Physicians prefer online resources

When making clinical decisions, physicians spend twice as much time using online resources compared to print



Note: Online resources include professional websites, drug references, mobile apps, email newsletters, etc. Print resources include journals and reference materials

Source: Manhattan Research - Google Physician Channel Adoption Study



Online sources outweigh the print, it's so much easier. You don't need to have books and journals in front of you, you can find information on your iPhone or laptop or wherever you are. I can be in with a patient and I can easily give the patient information or be able to explain things a little more easily.

OB/GYN

Search and digital adoption spans all ages



Physicians under age 45

90% own smartphone

15hrs per week spent online for professional purposes

82% use search engines daily ←

77% of time spent using online resources for clinical decisions



Physicians ages 55+

80% own smartphone

9hrs per week spent online for professional purposes

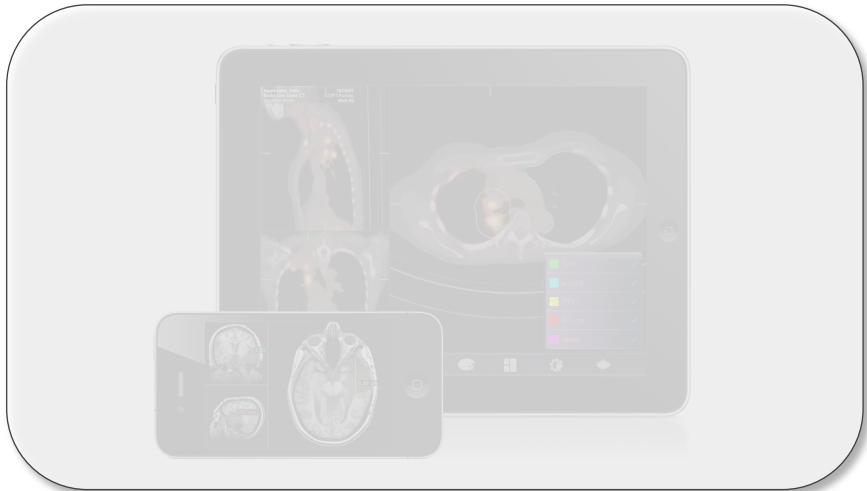
84% use search engines daily ←

64% of time spent using online resources for clinical decisions

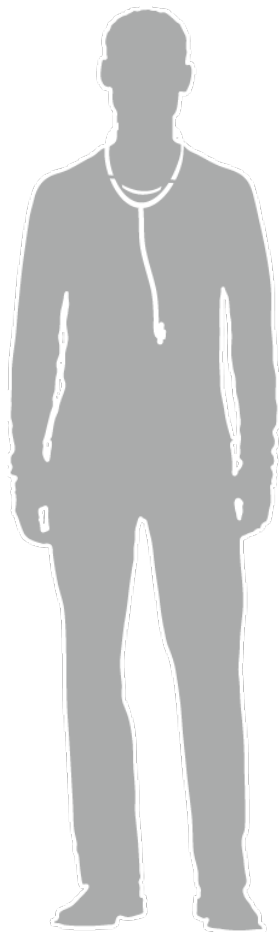
What did we find?



Search is the doctor's digital stethoscope



For physicians' clinical and treatment decisions...

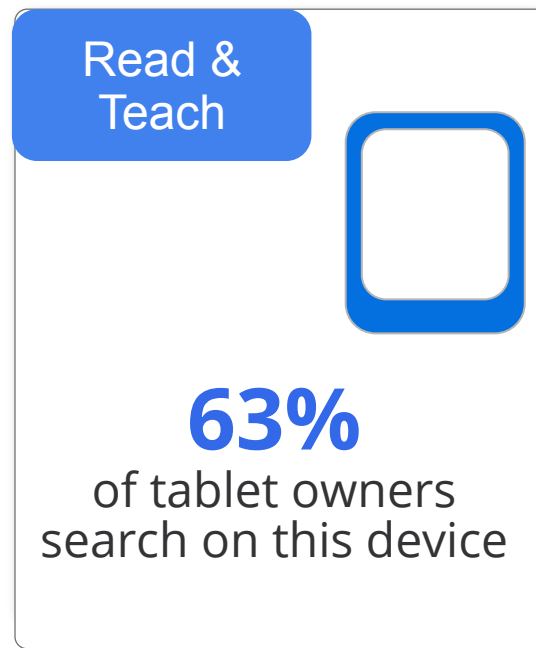
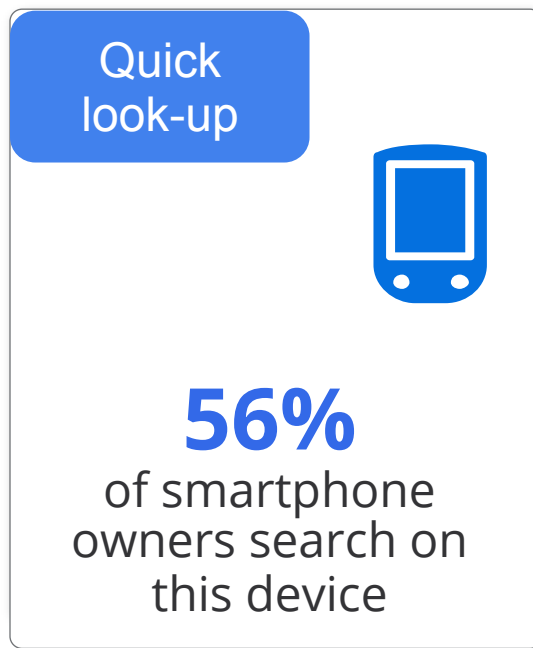
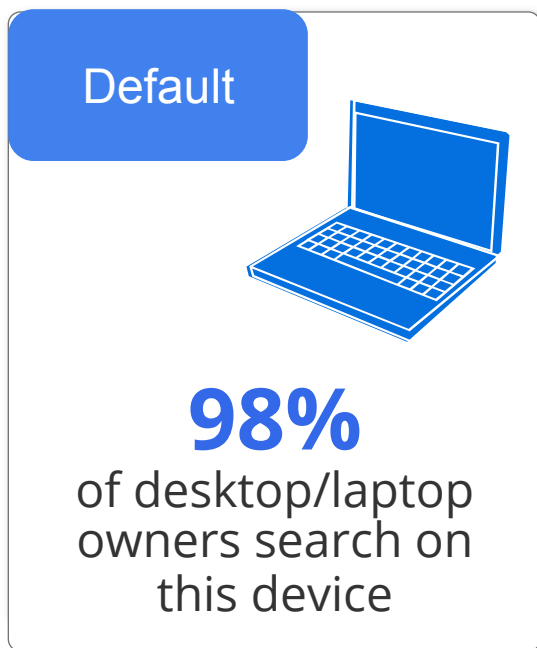


Search is indispensable

- **across all devices**
- **at all times**
- **on many topics**
- **and drives action**

Physicians search on all devices

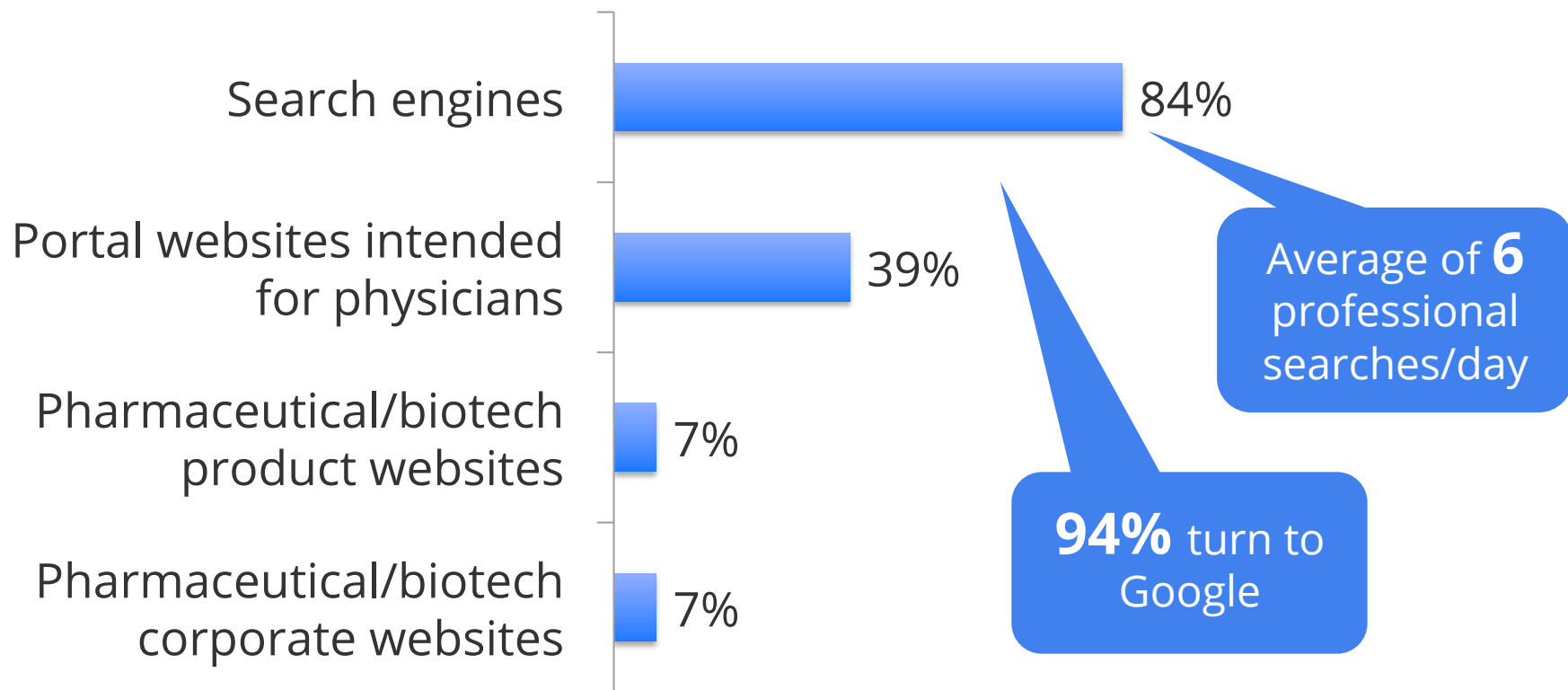
Use of search engines to find clinical and treatment information



... and more doctors start with a search engine than any other online resource or website

Search is a daily activity

Percent using professional online resources daily

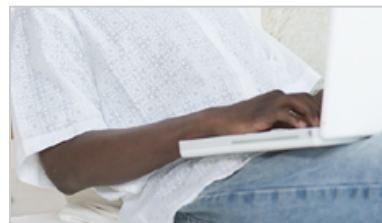


Physicians search on many occasions

When search engines used to find clinical and treatment information



56%
on lunch breaks



70%
after work or on weekends



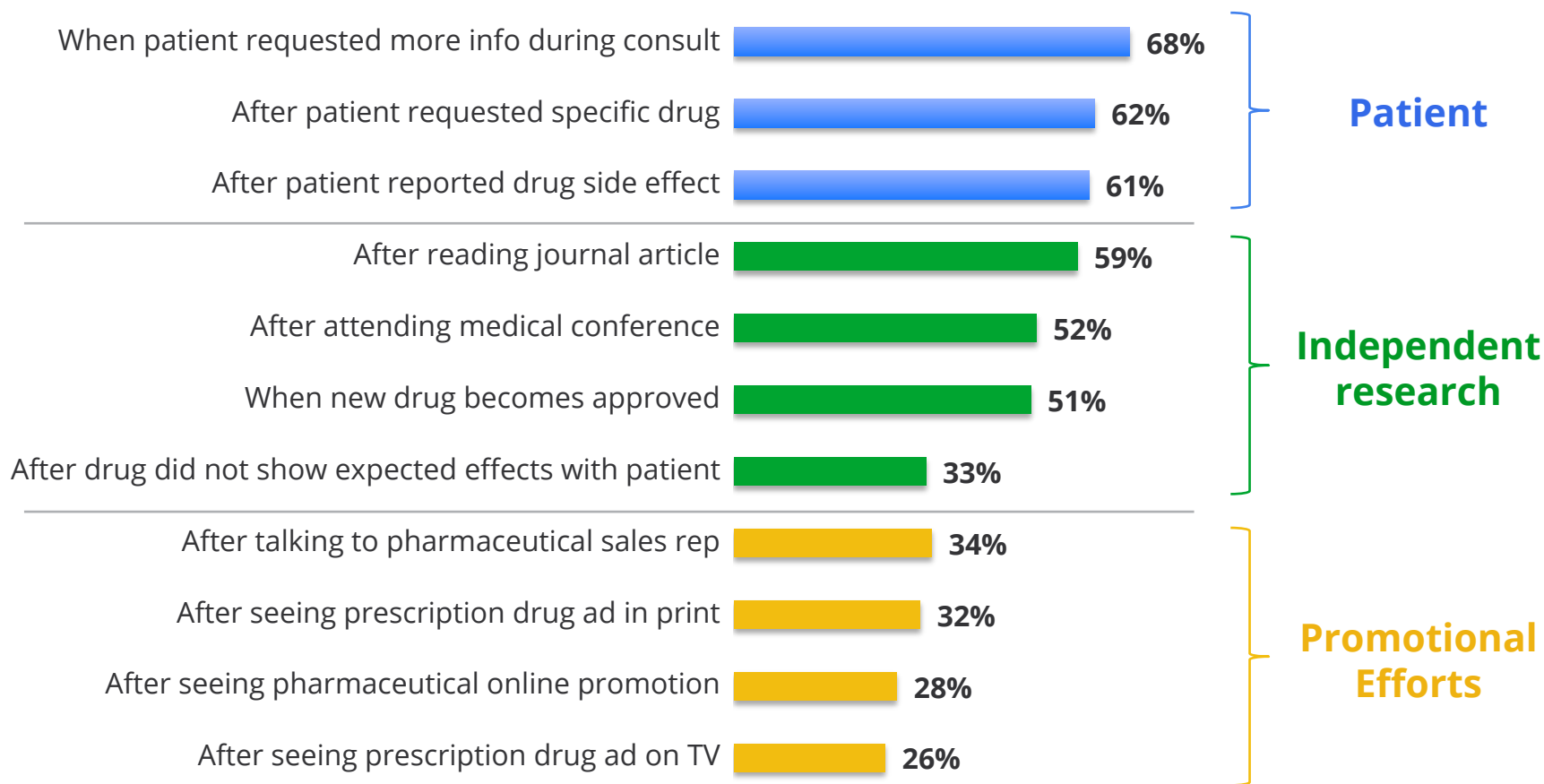
77%
between patient consults



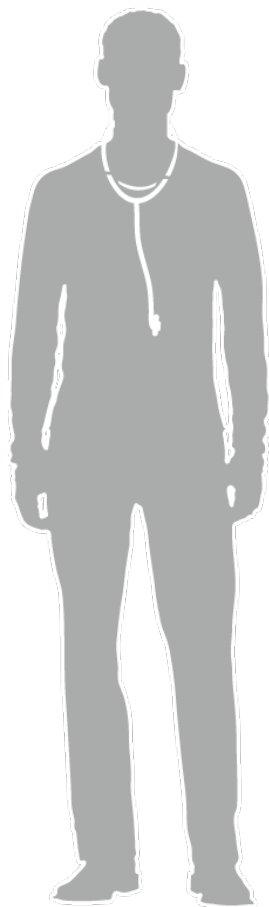
41%
during patient consults

Physicians search for many reasons

Situations that prompted use of a search engine



Google for doctor, Google for patient



Breadth of information

Patient testimonials and clinical studies

Conditions/symptoms with which I'm less familiar

New products and clinical developments

Patient education, admin, copay support

Dosing info, side effects, or research on conditions

To find a specific product or medication

Google helps doctors be better doctors




Google is an amazing resource for medicine. It's a great resource that gives me great information. If I can show the patient a picture or pull up a study or factual information, it increases my credibility [as a physician] and patients really appreciate the collaboration.

PCP

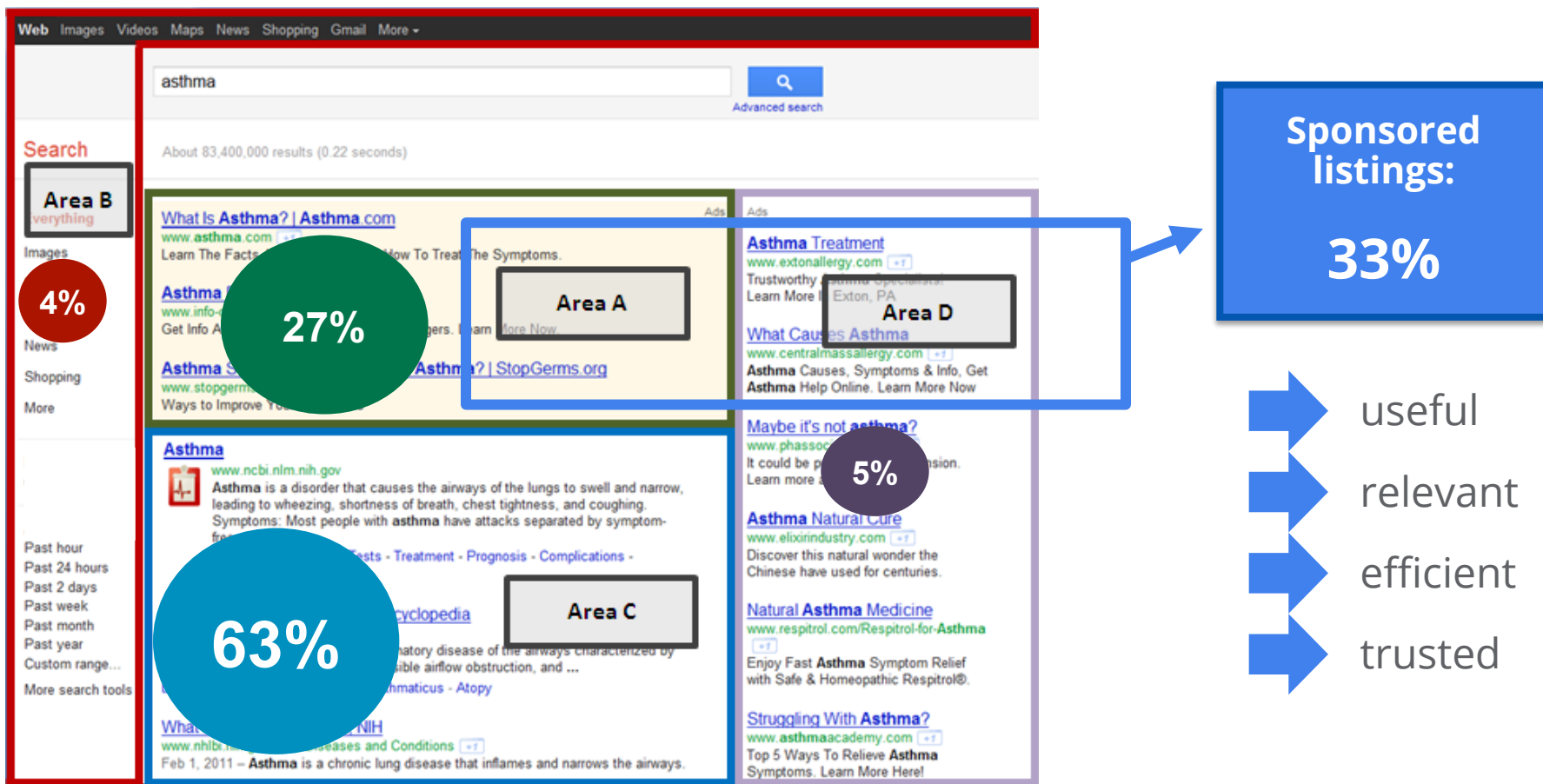
Not surprisingly, search terms are varied

Keywords used when looking for clinical information

 = Branded	Any branded keywords: 59%	Physicians
Condition		84%
Generic prescription drug name		56%
Branded prescription drug name		50%
Symptoms		46%
Generic medical device name		32%
Branded medical device name		28%
Name of clinical trial or study		26%
Pharmaceutical manufacturer		17%
Name of a medical professional or expert		16%

1 in 3 clicks first on sponsored listings

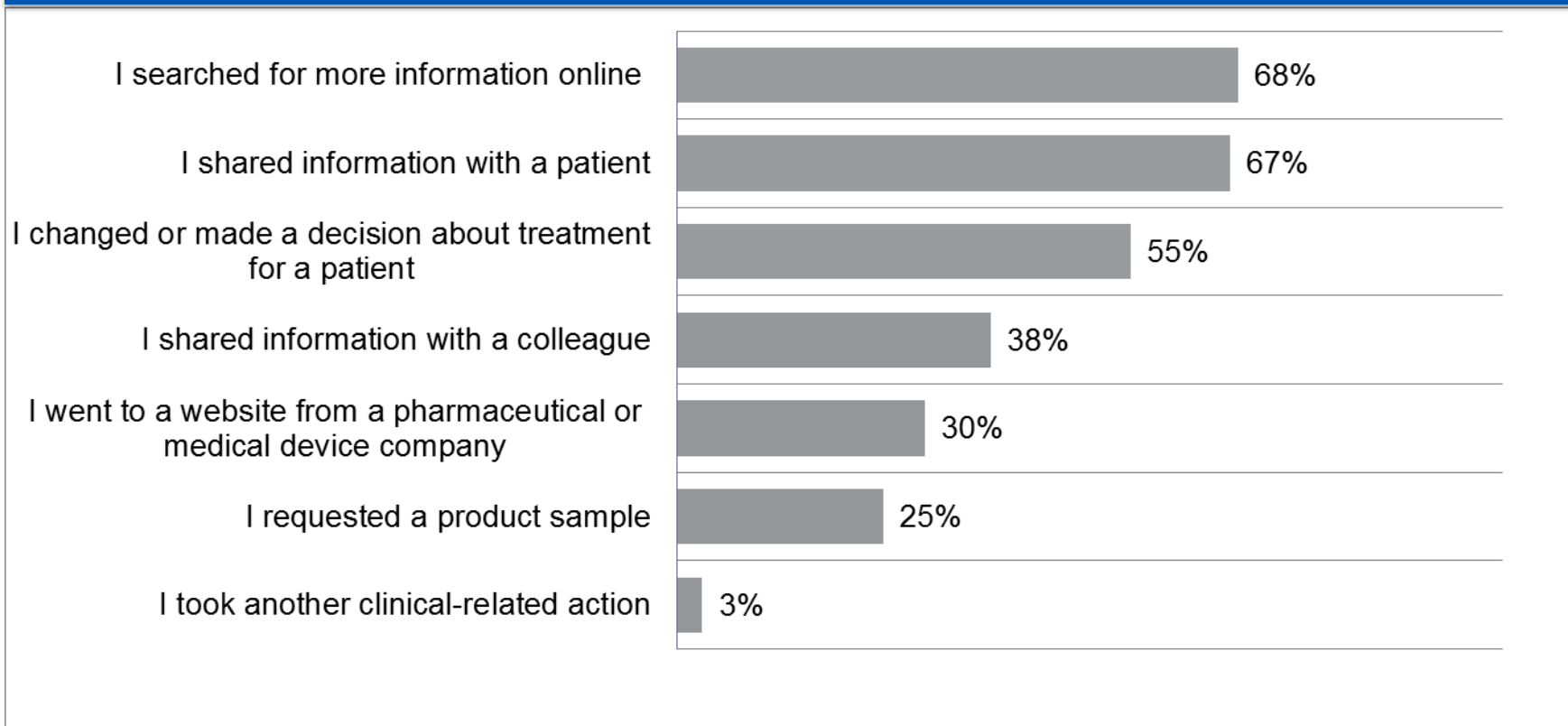
Areas clicked first when looking for clinical/treatment information



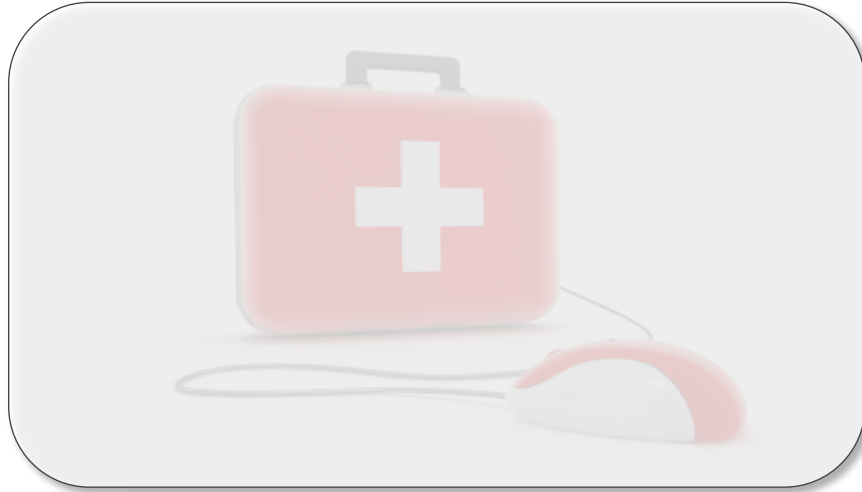
Search influences clinical decisions

Actions taken as a result of using search engines for clinical and treatment information

93% take action as a result of search (any of the below)



What did we find?



Medicine is
mobile



How is your smartphone most valuable to you in your practice?

As a drug reference database and for dosing info.

As a search engine and to check email

I Google diseases and check meds on Epocrates

Immediate access to prof. sites for quick clinical answers

I am able to check UpToDate, and search the web for any patient related information

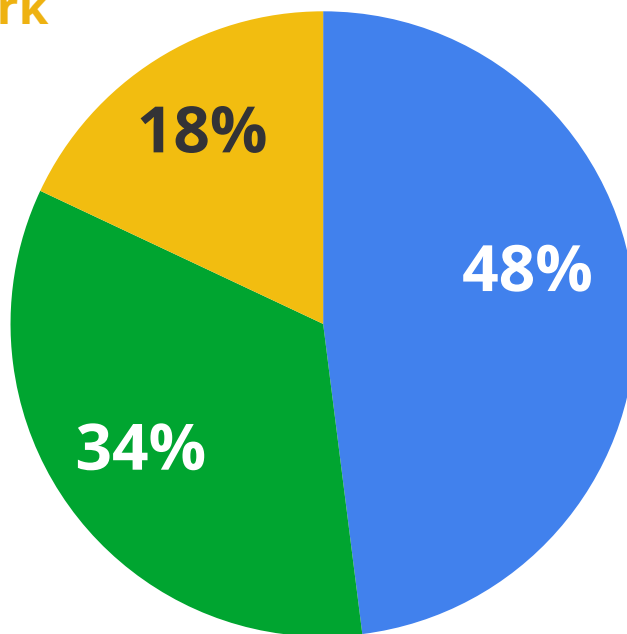
Asked among physicians who own a smartphone

Physicians favor mobile search over apps

Percentage of time physicians use the following methods to find clinical information on a smartphone

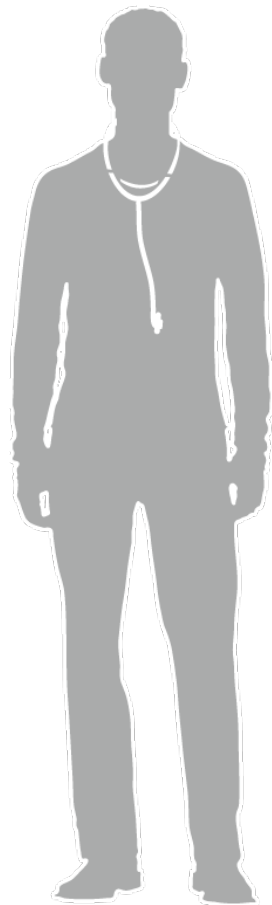
Type website into browser,
or use bookmark

Mobile
professional app

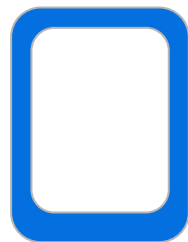


Search engine

Mobile search is a daily activity



smartphone searchers
49% search at least daily

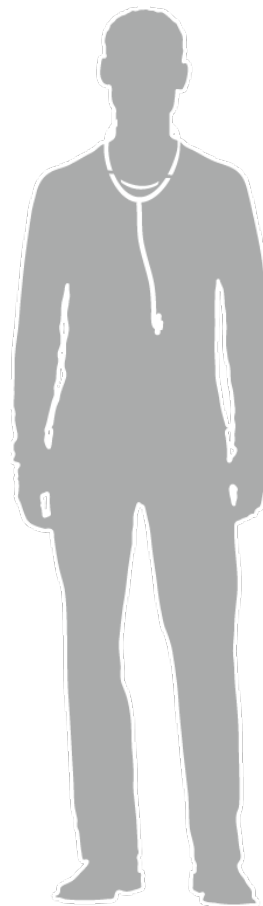


tablet searchers
39% search at least daily

I still haven't found what I'm looking for...

69% agree they rely on search engines to navigate the Internet on smartphone.

51% agree they generally find the health or treatment information they are looking for on a smartphone.



74% agree they rely on search engines to navigate the Internet on a tablet.

69% agree they generally find the health or treatment information they are looking for on a tablet.

Among those using mobile search on their smartphone, n=360

Among those using mobile search on their tablet, n=226

Optimizing sites for mobile devices is critical



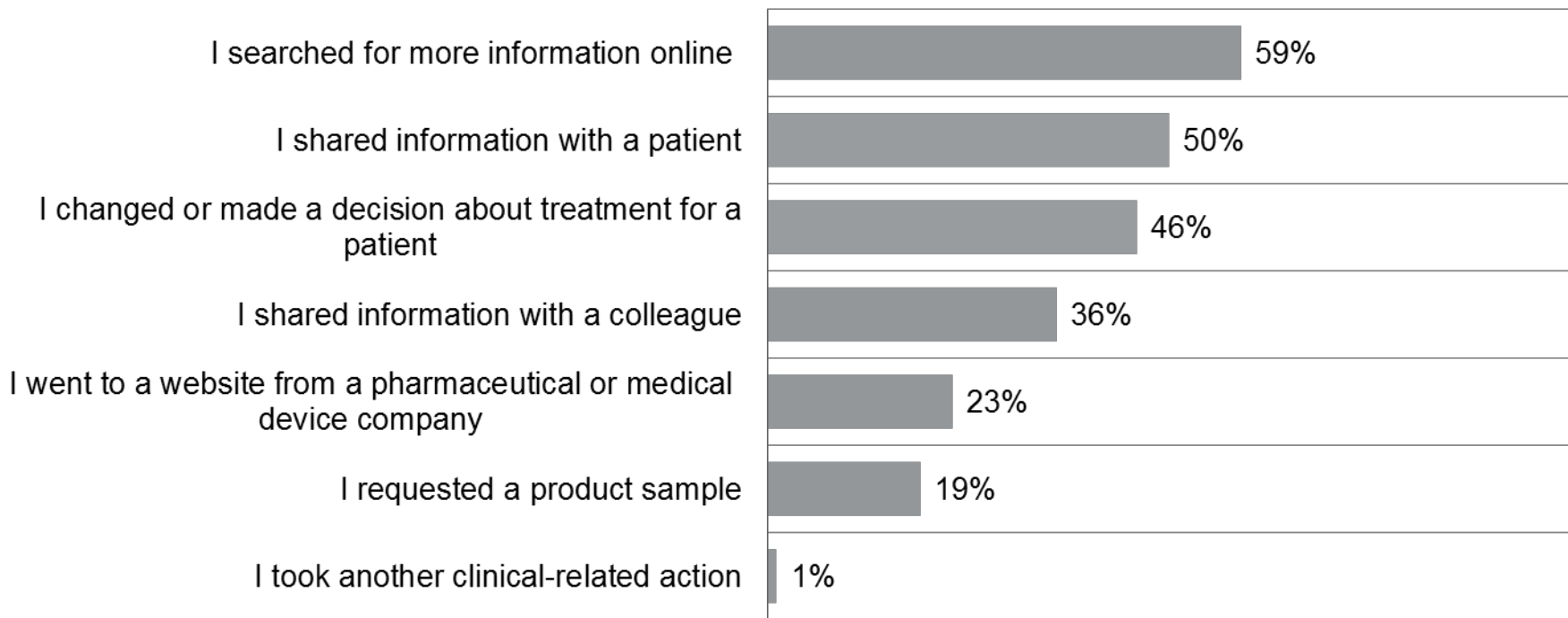
62% of physicians are likely to **abandon the mobile website if it's not optimized for a smartphone**

41% report that they are led to mobile-optimized sites **only occasionally**

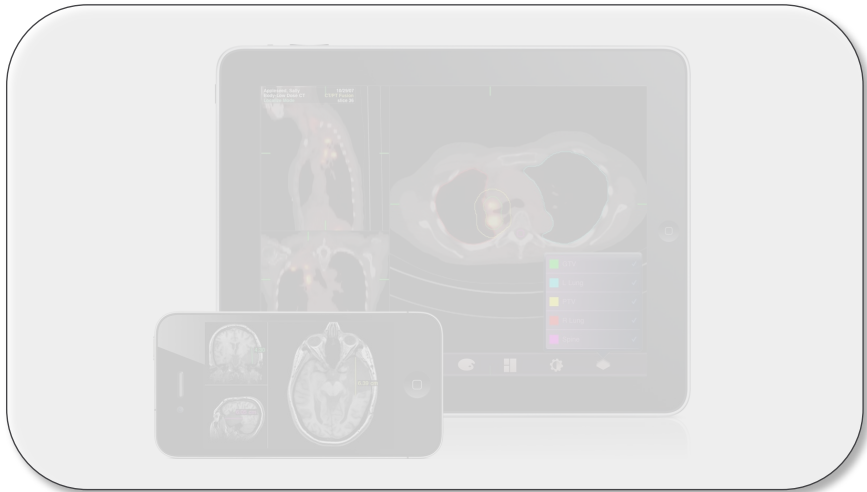
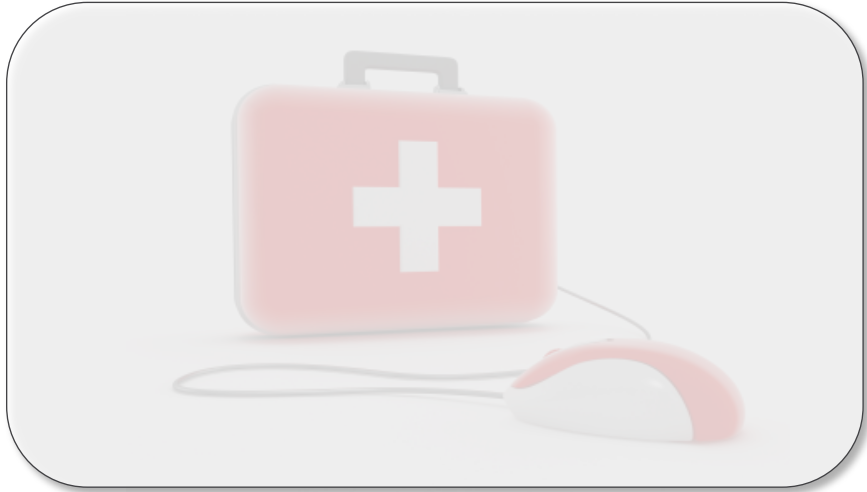
Mobile search is action-oriented

Actions taken as a result of clinical and treatment information accessed on smartphone or tablet in the past twelve months

90% of those using mobile search have taken action (any of the below)

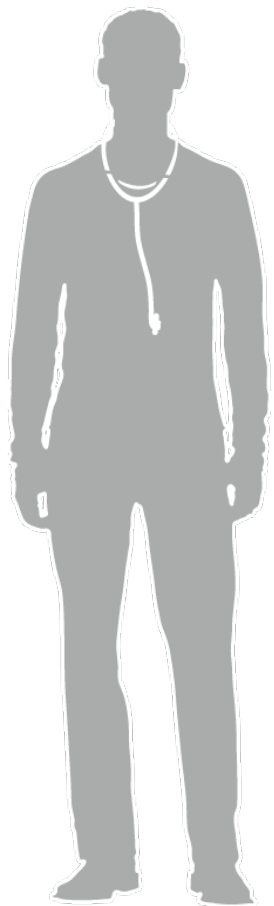


What did we find?



Online video is
an educational
tool

Physicians spend considerable time watching online video



6 hours per week watching video online on average
(**half** for professional purposes)



8 hours per week watching television on average

Physicians watch video on all devices

Among those watching online video, percentage of time viewing by device...



67%
watch on a
desktop/laptop*



13%
watch on a
smartphone*



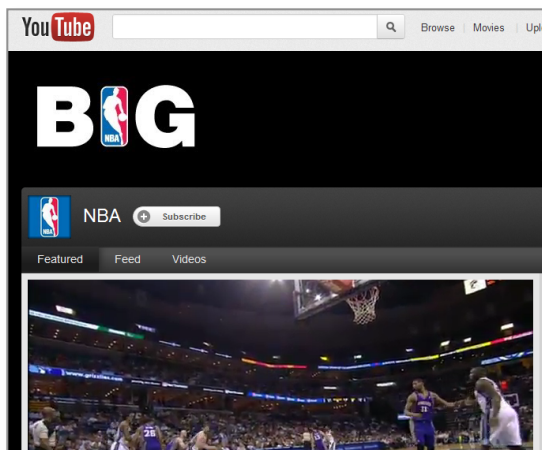
29%
watch on a tablet*

Physicians watch a wide array of professional online video

Types of medical videos watched online in the past 12 months

	Physicians	
Continuing medical education	55%	
Lectures	48%	
Disease and condition information	43%	
Demonstrations of medical procedures	40%	
Health news	37%	
Presentations from key opinion leaders (KOLs)	37%	
Information about a specific drug or treatment	36%	← 26% are interested
Medical device information	23%	
Video clips to show patients	13%	← 29% are interested
Conversations between a physician and a patient	10%	
Patients discussing their condition or treatment	9%	

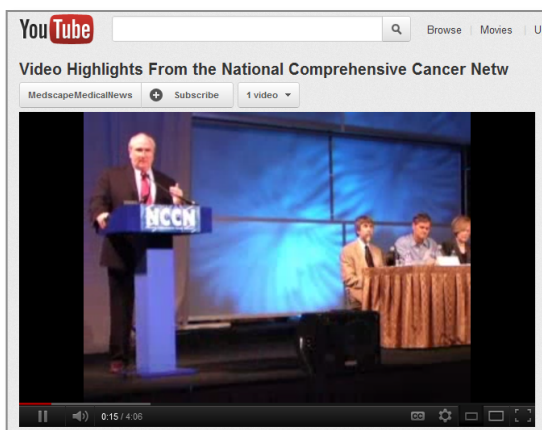
YouTube is viewed for work and play



Watch videos for personal purposes on...

87% YouTube
24% Facebook
20% Hulu

Among those watching video online for personal purposes, n=372



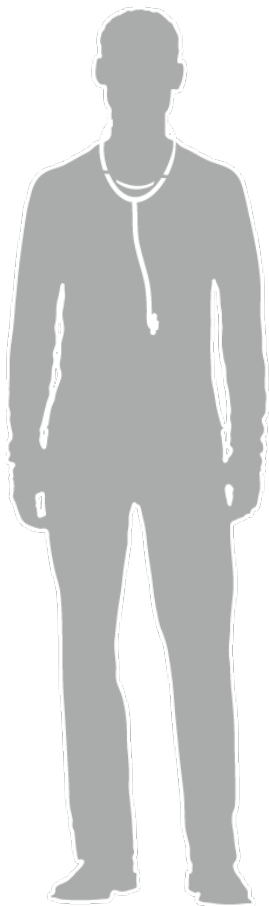
Watch videos for professional purposes on...

67% Medscape
44% YouTube
28% Pharma company website

Among those watching professional video online, n=285

YouTube: Easy, searchable, lots of variety

Physicians who prefer YouTube say....



Always find something I am looking for

Easy access, broad options

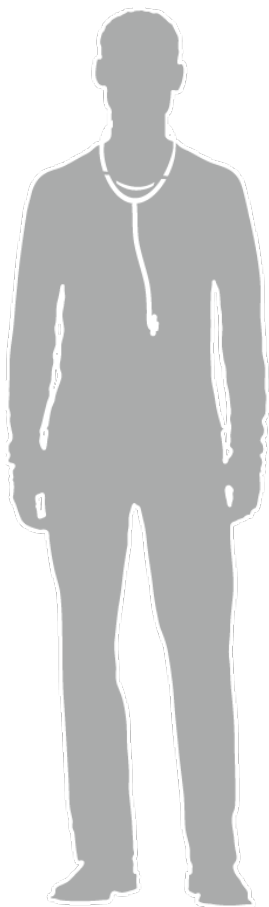
Easy interface, easy search, comfortable using site

Good quality video, good search capability

Large selection, easy to search

Vast choice, easy to use, and versatile on all different devices

YouTube: Easy, searchable, lots of variety



The iPad has revolutionized YouTube. You can get surgical procedures, mechanisms of actions to find out the pharmacological ways in which the drugs work, pharmacodynamics, pharmacokinetics, animations, and video streaming.

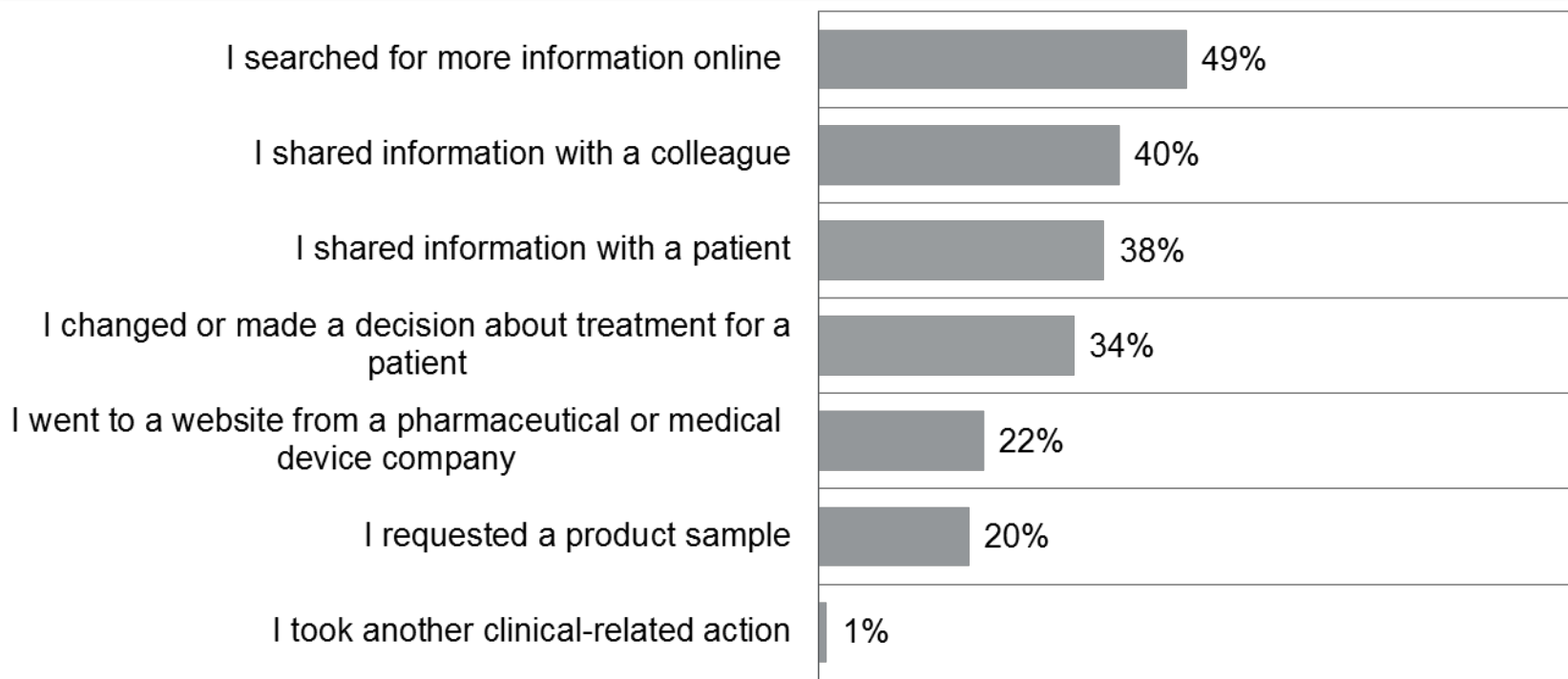
Chicago
Cardiologist

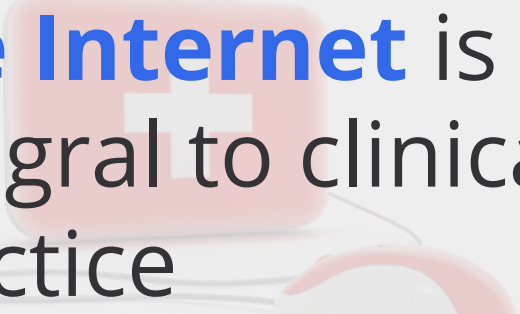


Online video drives clinical action

Actions taken as a result of watching online professional video in the past twelve months

85% of those watching professional video online have taken action





The Internet is
integral to clinical
practice



Search is the
doctor's digital
stethoscope



Medicine is
mobile



Online video is
an educational
tool

What this all means for you...



Be there when they're looking for you



Leverage the power of sight, sound and motion



Reach them on the go

The future is now



I think the internet is going to be the sole source of information in the future. Everything will be consolidated digitally, and we'll see a merge with the electronic medical record. You'll be able to search for different topics, be able to print things out for patients or direct them to certain websites while you're in the room with them.

PCP



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