

TAKING THE PULSE®

PHYSICIANS AND EMERGING INFORMATION TECHNOLOGIES

Taking the Pulse® U.S. – Physicians and Emerging Information Technologies is a syndicated multi-client physician research study and advisory service focused on understanding technology adoption and integration trends among U.S. practicing physicians. The primary objective of the research study is to track which technologies physicians have adopted, how they are currently using them, and how they plan to use them in the future.

As the population of online physicians in the U.S. has reached saturation with about 99% of all physicians using the Internet today, it is now imperative for healthcare marketers and strategic planners to better understand the area under the curve – the relevant sub-segments of physicians and how they are incorporating technology into their practice.

Taking the Pulse® moves beyond simple online adoption metrics to examine the reach and relevance of the dozens of new media and technology-enabled sources physicians rely on to make decisions on a daily basis. Physician media mix is changing rapidly year over year, and models that are even just two years old are insufficient for understanding how physicians gather information today.

Fielded annually in Q1, Taking the Pulse® explores topics such as email communication; PDA and smartphone use; online textbooks, journals, and physician portals; practice websites; EMR; electronic prescribing; Web-based sampling; electronic detailing; online clinical trials; and electronic CME.


In addition to analyzing overall physician market trends, clients can further segment Taking the Pulse® to derive statistically relevant insight across the following specialties: Pediatrics, PCPs (Family Practice, General Practice, and Internal Medicine), Allergy and Immunology, Cardiology, Dermatology, Emergency Medicine, Endocrinology, Gastroenterology, Infectious Disease/HIV Physician, Nephrology, Neurology, OB/GYN, Ophthalmology, Oncology - Hematology, Oncology - Medical, Psychiatry, Pulmonology, Radiology, Rheumatology, Surgery - General, Surgery - Orthopedic, Urology.

TAKING THE PULSE® TOPICAL SUMMARY

- **Online and Offline Professional Information Sources:** Online and offline information sources used, including textbooks, journals, conferences, CME, reps, search engines, sites visited
- **Mobile Technology Adoption:** Device adoption by platform (iPhone, BlackBerry, Palm, Android); professional activities conducted on the smartphone; top mobile apps and websites used
- **Online User-Generated Content:** Use of physician-only communities, messageboards and blogs
- **General Access and Technology Profile:** Practice technology profile; frequency of Internet use; frequency of professional activities online and offline
- **Patient Interaction and Education:** Patients bringing information into office; sites recommended to patients; types of patient education sources of interest
- **Digital Health Infrastructure:** Adoption of electronic medical records (EMR); electronic prescribing; impact of ARRA on decision to implement EMR system

RESEARCH METHODOLOGY

- Conducted by RDD (random digit dial) telephone and online survey in Q1 2010
- 2,033 in-depth interviews; representative of all practicing physicians; quotas set for 25 specialties
- In-depth = ~100+ questions ~500+ variables for detailed segmentations
- Data weighted to key population demographics (including age, gender, specialty and region)
- Margin of error +/- 2.5%, at 95% CI



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TAKING THE PULSE® DELIVERABLES

- **Comprehensive Slide Deck:** Detailing key findings and focusing on physician awareness, adoption, usage, frequency and future interest in eHealth, PowerPoint format.
- **Executive Mmanagement Report:** Focusing on key findings, future trends, potential markets and changes in the online healthcare and pharmaceutical industry based on salient data and trends.
- **Strategic Briefing or Webinar:** A presentation of the *Taking the Pulse*® data set.
- **Client Webinar Access:** A review of the findings, archived as a .wmv file.
- **Market Trends:** A synopsis of key data trends, Adobe Acrobat PDF format.
- **Research Modules:** In-depth reports on a variety of healthcare and technology topics, rich with graphs and data.
- **Strategic Insights:** Articles written by Manhattan Research analysts on a variety of topics from the syndicated research studies.
- **Summary Data Tables:** Analyzing the primary segments against all of the data elements in *Taking the Pulse*®, Adobe Acrobat PDF format.
- **Analyst Inquiry Privileges:** Access with Manhattan Research's experienced health team for one year. The number of hours varies based upon the package purchased.
- **Client Web Access:** Access to all written reports and data, including ASCII and SPSS formats.

STRATEGIC USES OF TAKING THE PULSE®

- Measure online and offline media usage and interest
- Assess your current and future physician marketing mix
- Evaluate the potential ROI of new technology applications
- Segment physicians across health channels and market sectors
- Determine the relative influence of various sources on physician decision making
- Compare multi-channel health service usage among physician segments
- Identify barriers to seeking online and offline health information, products and services
- Leverage physician attitudes and behaviors surrounding privacy, security and trust to your brand's benefit

ABOUT MANHATTAN RESEARCH

Manhattan Research, a Decision Resources, Inc. company, is a global pharmaceutical and healthcare market research and strategic advisory firm. We conduct annual research studies covering eHealth trends among physicians and consumers, including Taking the Pulse®, Taking the Pulse® Nurses, Taking the Pulse® Europe, Taking the Pulse® Asia, Cybercitizen Health®, Cybercitizen Health® Europe, ePharma Consumer®, and ePharma Physician®. Broad consumer and physician research is complemented by targeted analysis for over 100 consumer therapeutic segments and physician specialist segments. For more information, please contact sales@manhattanresearch.com or visit www.manhattanresearch.com.