

# 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: Allergists, Cardiologists, Dermatologists, Electro Physiologists, Emergency Medicine, Endocrinologists, Gastroenterologists, Surgeons, Hematology Oncologists, Infectious Disease Specialists, Medical Oncologists, Nephrologists, Neurologists, Obstetrics/Gynecologists (OB/GYNs), Ophthalmologists, Orthopedic Surgeons, Pediatricians, Primary Care Physicians (General Practice, Family Practice and Internal Medicine), Psychiatrists, Pulmonologists, Radiologists, Rheumatologists and Urologists.

### TAKING THE PULSE® TOPICAL SUMMARY

- **General Access and Technology Profile:** Practice technology profile, frequency of Internet use, frequency of professional activities online
- **Online and Offline Professional Information Sources:** Online and offline information sources used, including textbooks, journals, conferences CME, reps, search engines, sites visited
- **Detailing and Pharma Services:** eDetailing participation and future interest, use and interest in full-service portals, product and corporate site visitation, rep technology usage
- **Web 2.0 Technologies:** Awareness and use of streaming video, blogs, podcasting, wikis and social networking, including use of sites such as Sermo
- **Email Use and Opportunity:** Email newsletters, email with patients, colleagues, and pharmaceutical, biotech or device companies
- **Patient Interaction and Education:** Patients bringing information into office, sites recommended to patients, types of patient education sources of interest
- **Digital Health Infrastructure:** ePrescribing, EMR, Practice Management
- **Mobile Technology Profile:** PDA, Mobile Phone, Internet, Mobile Integration, iPods, MP3 players and tablet PCs, preference for using professional functions on mobile vs. PC

### RESEARCH METHODOLOGY

- Conducted by RDD (random digit dial) telephone and online survey
- 1,900 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



## 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 management 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
- Understand the role and influence of DTC on physician prescribing behavior
- 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, LLC is a marketing information and services firm that helps healthcare and life sciences organizations adapt, prosper and explore opportunities in the networked economy. We focus on the intersection of technology and healthcare business trends and seek to understand the forces that will impact the competitive landscape for our clients.

Manhattan Research has earned a reputation for perceptive and insightful analysis of emerging technology trends and the resulting business impact. We differentiate ourselves from other advisory and research firms by relying on robust trended data, seasoned analysts and a networked advisory board to offer a balanced, holistic and unique view of the competitive landscape.

Manhattan Research produces annual syndicated research studies focusing on physician adoption and use of various information technologies for health and disease management.

**Taking the Pulse**®, **Taking the Pulse**® Europe and **Taking the Pulse**® Asia focus on broad trends with regard to information technology adoption among the U.S., European and Asian physician populations. **ePharma Physician**® targets the practicing physician audience regularly using the Internet to seek pharmaceutical related information and services. **Taking the Pulse**® Nurses looks at technology trends among the U.S. nursing population.

In addition to the four physician studies, we offer data, insight and analysis regarding information technology use and adoption for more than 25 unique physician specialty segments.

Our consumer studies **Cybercitizen Health**®, **Cybercitizen Health**® Europe, and **ePharma Consumer**® focus on eHealth trends affecting the U.S. and European consumer populations.