



# Screen to Script

## The Doctor's Digital Path to Treatment

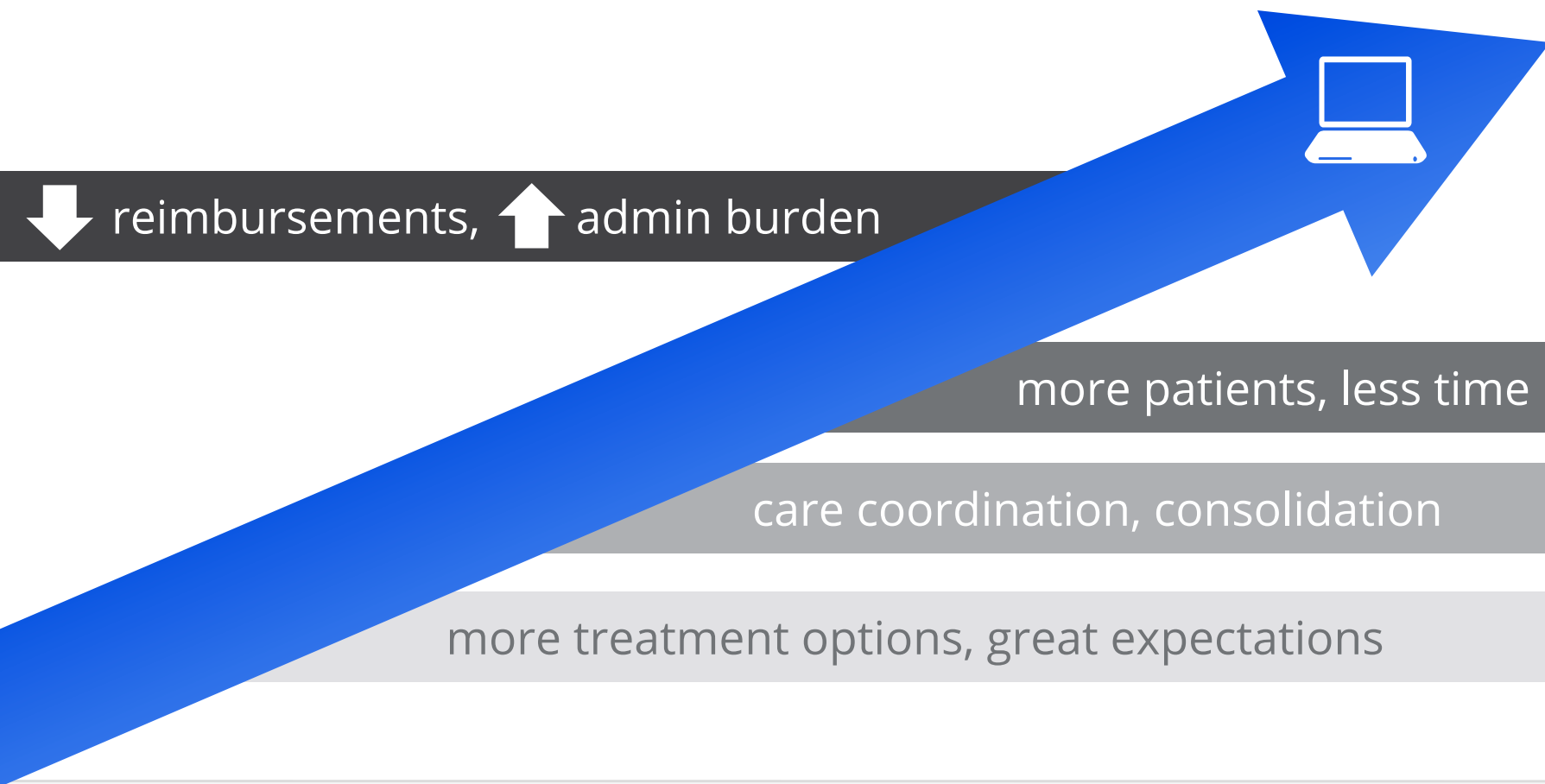
Google/Manhattan Research

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?**

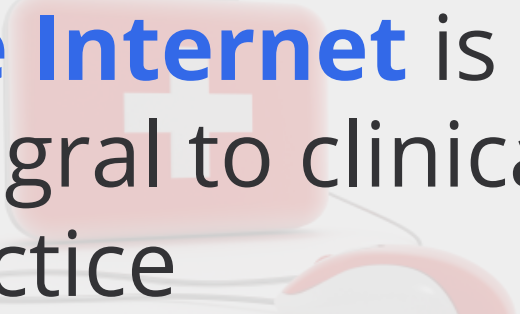
The survey was fielded in February and March 2012.

## **How do survey participants compare to the overall physician population?**

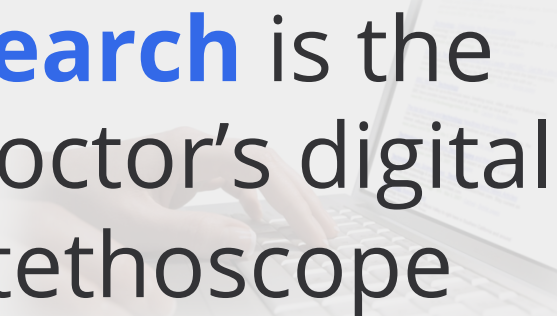
The final data set is compared to the known national universe of practicing U.S. physicians by age, gender, region, practice setting, and specialty. Manhattan Research can state with confidence that the sample is reflective of the overall population of U.S. practicing physicians today.



What did we find?



**The Internet** is  
integral to clinical  
practice



**Search** is the  
doctor's digital  
stethoscope



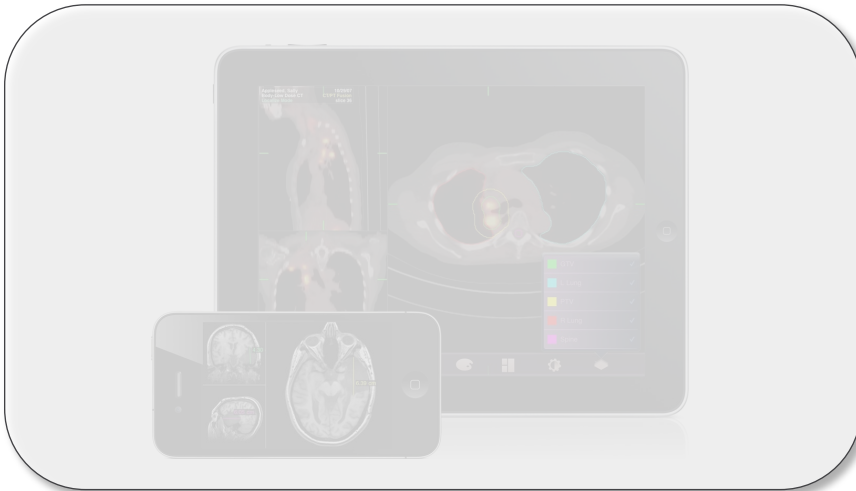
Medicine is  
**mobile**



**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



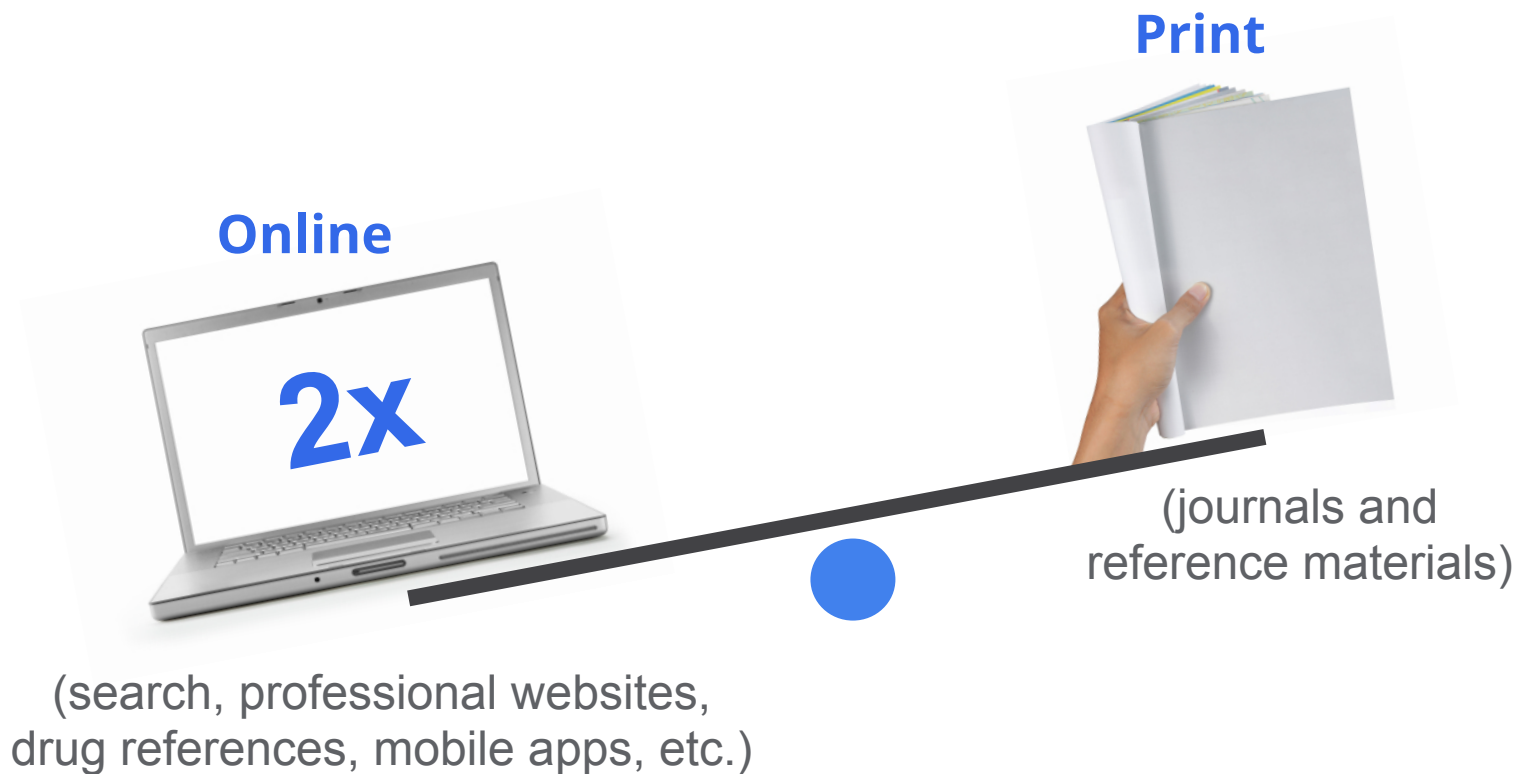
**54%**

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

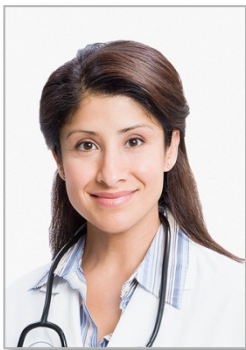




Online sources outweigh the print, it's so much easier. You don't need to have books and journals in front of you, you can find information on your iPhone or laptop or wherever you are. I can be in with a patient and I can easily give the patient information or be able to explain things a little more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

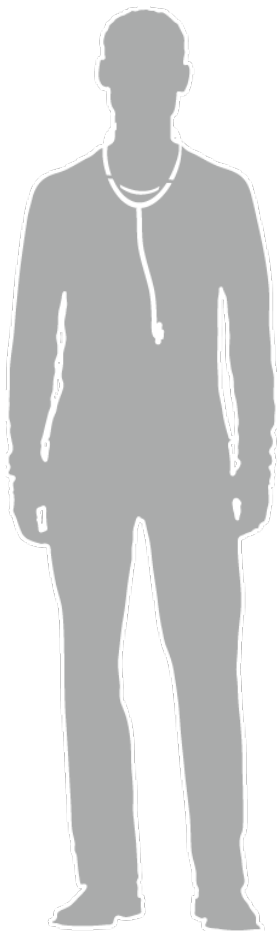
# What did we find?



**Search** is the doctor's digital stethoscope



For physicians' clinical and treatment decisions...

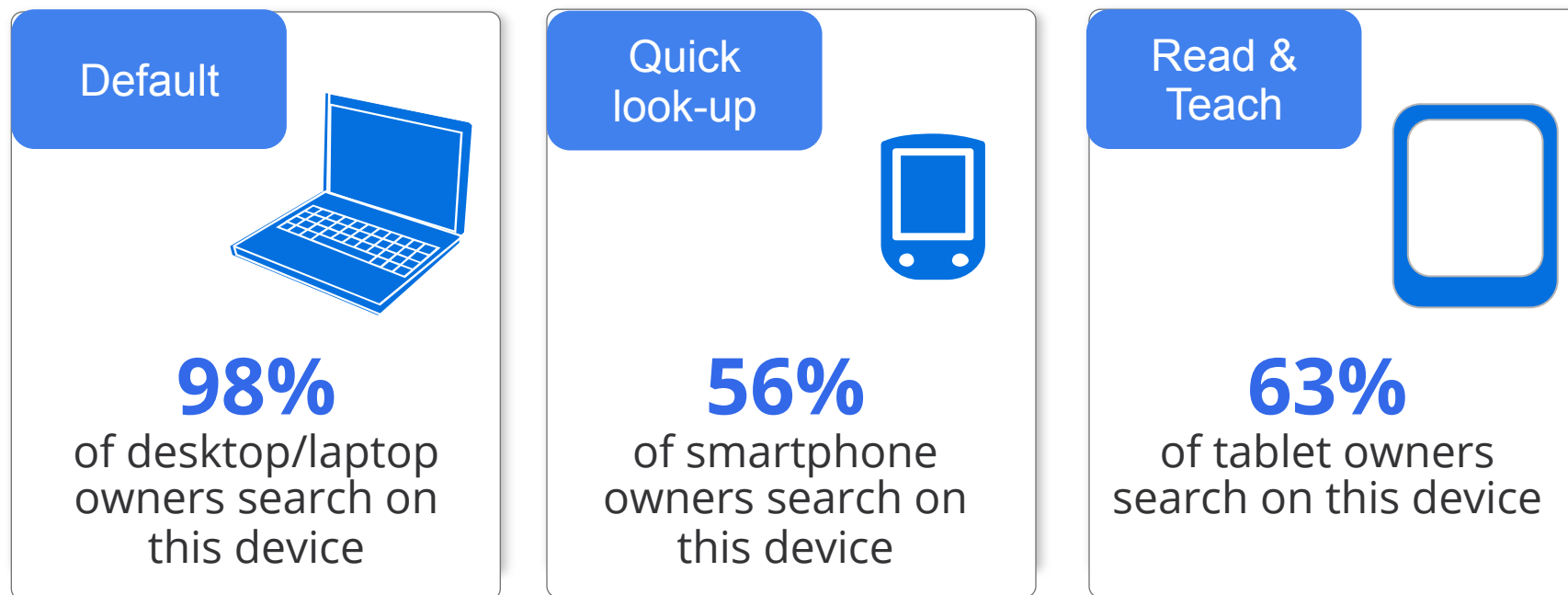


## Search is indispensable

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

# Physicians search on all devices

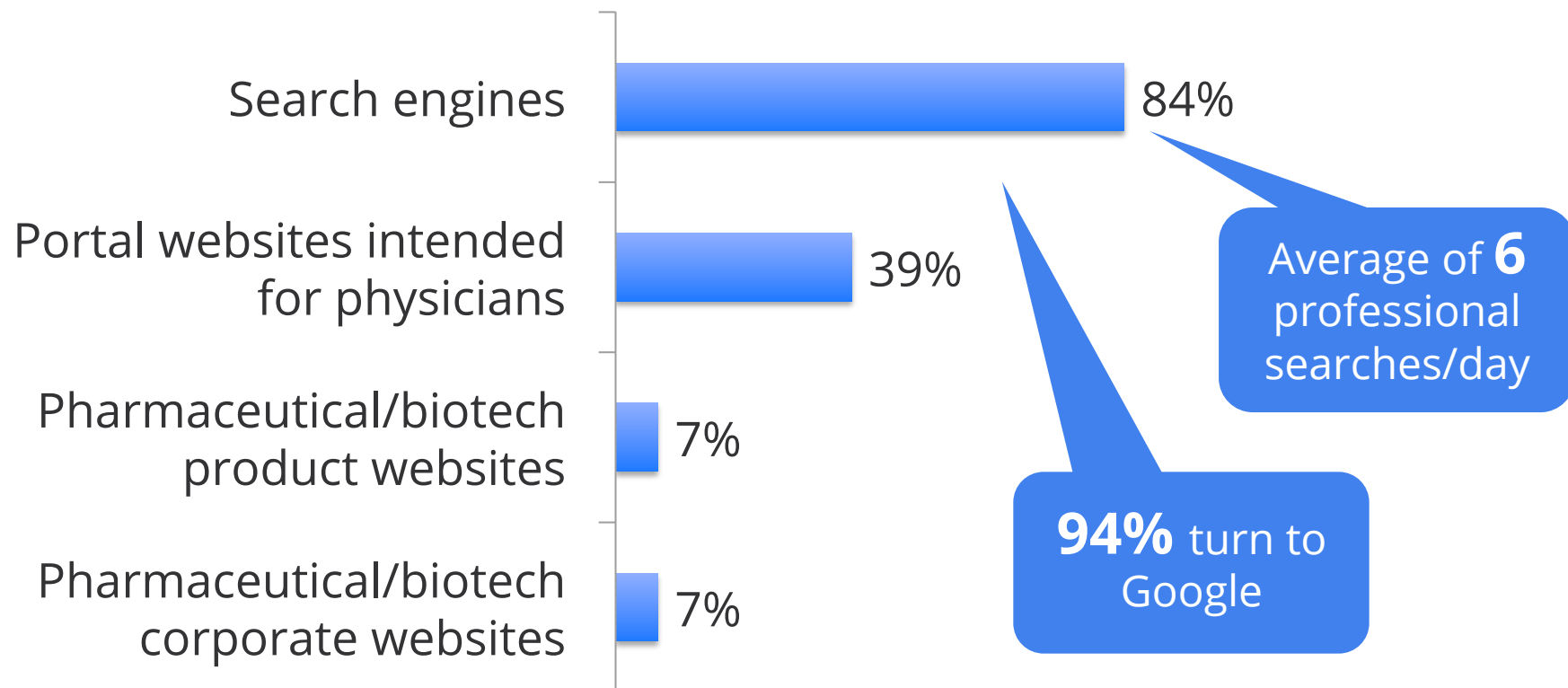
Use of search engines to find clinical and treatment information



... 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

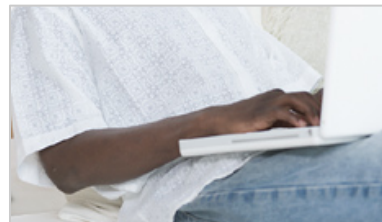


# Physicians search on many occasions

When search engines used to find clinical and treatment information



**56%**  
on lunch breaks



**70%**  
after work or on weekends



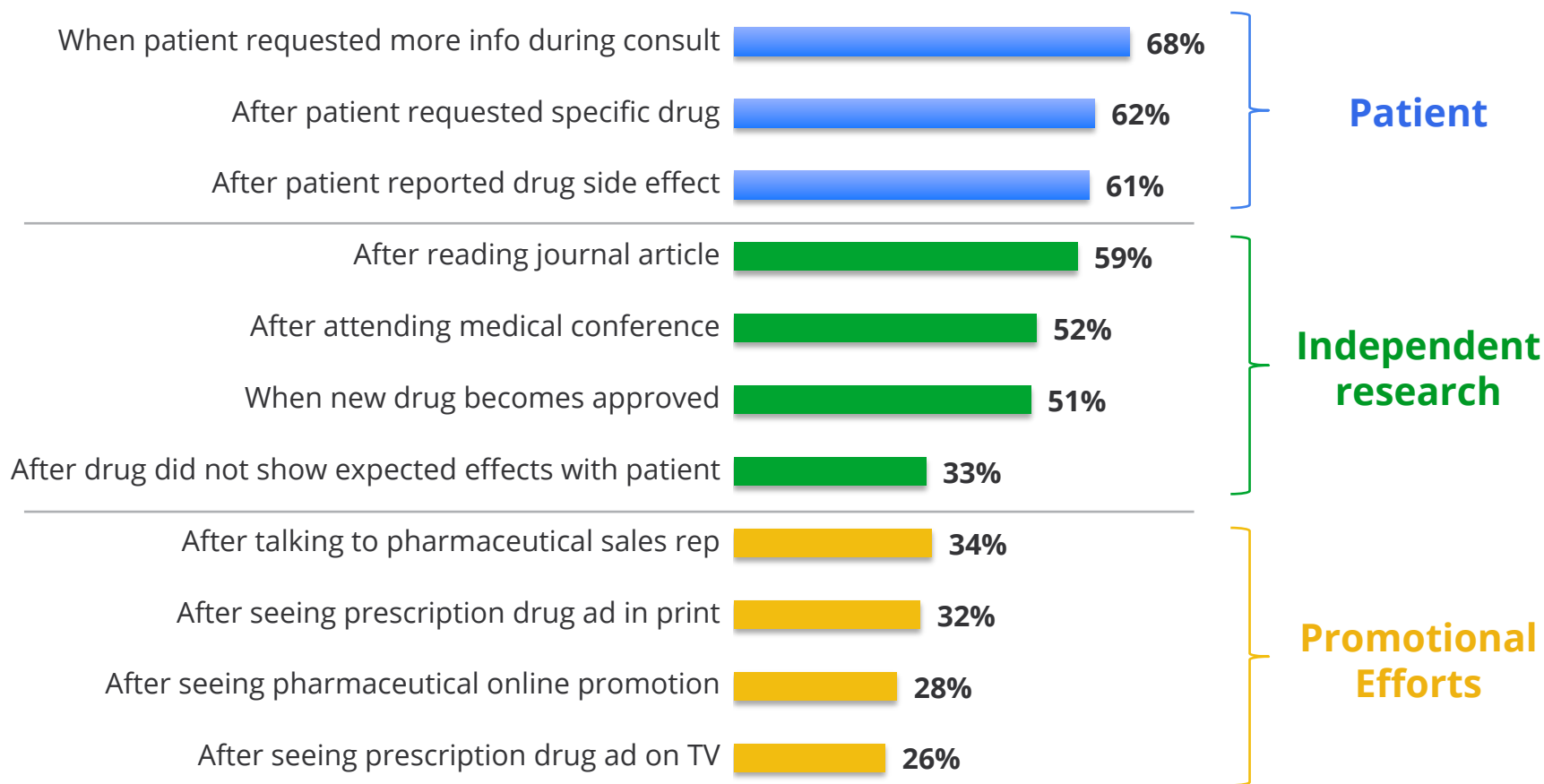
**77%**  
between patient consults



**41%**  
during patient consults

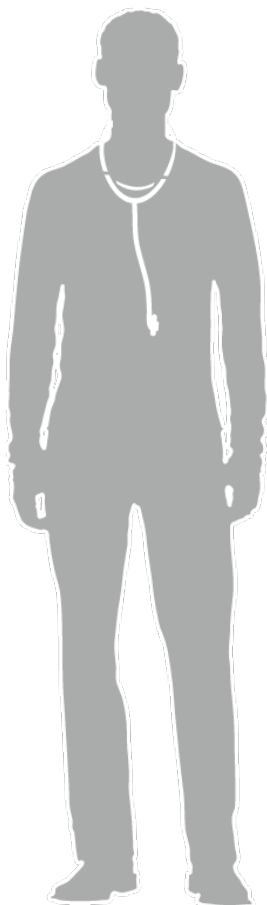
# Physicians search for many reasons

## 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

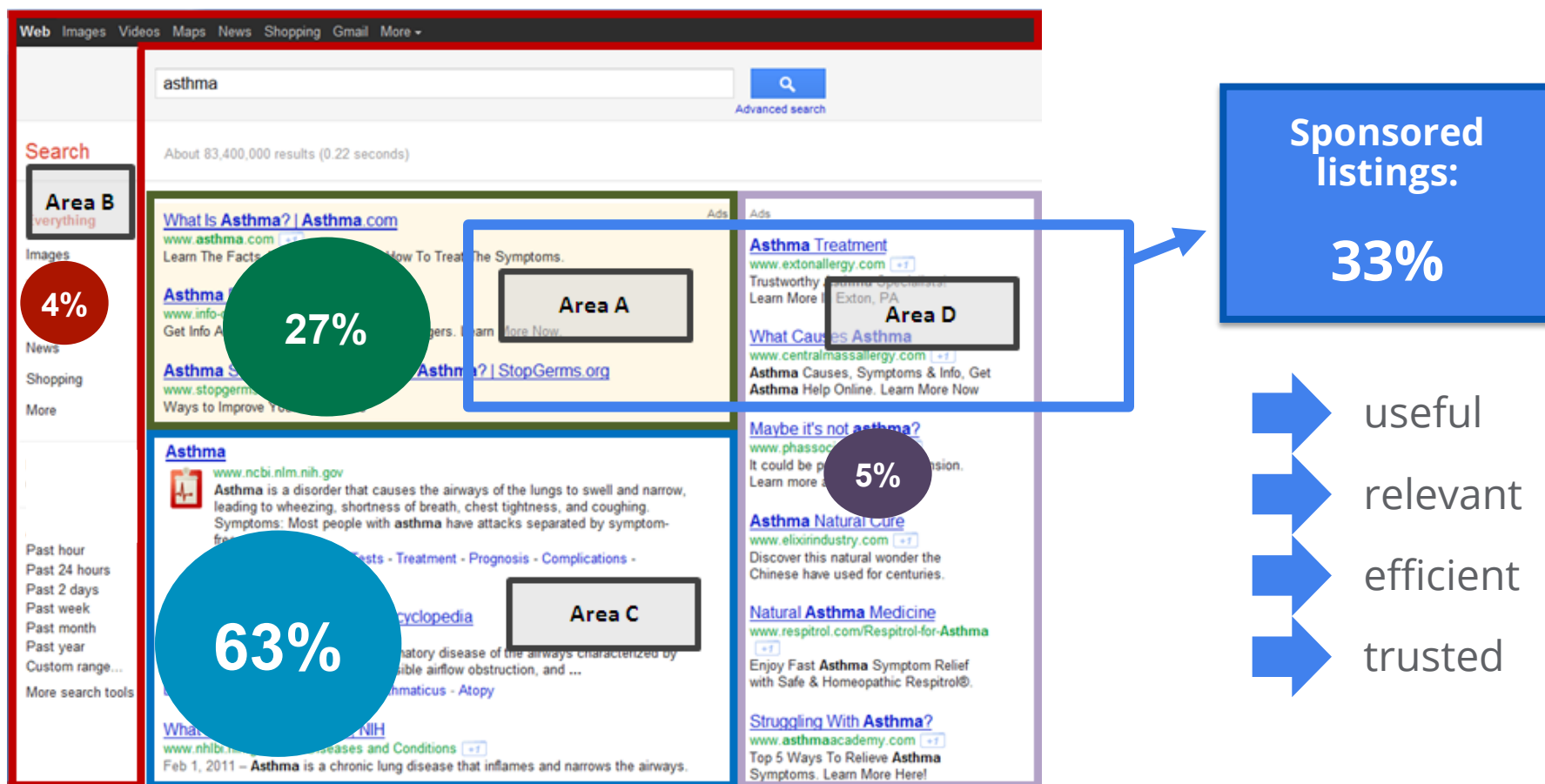
# Not surprisingly, search terms are varied

Keywords used when looking for clinical information

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

# 1 in 3 clicks first on sponsored listings

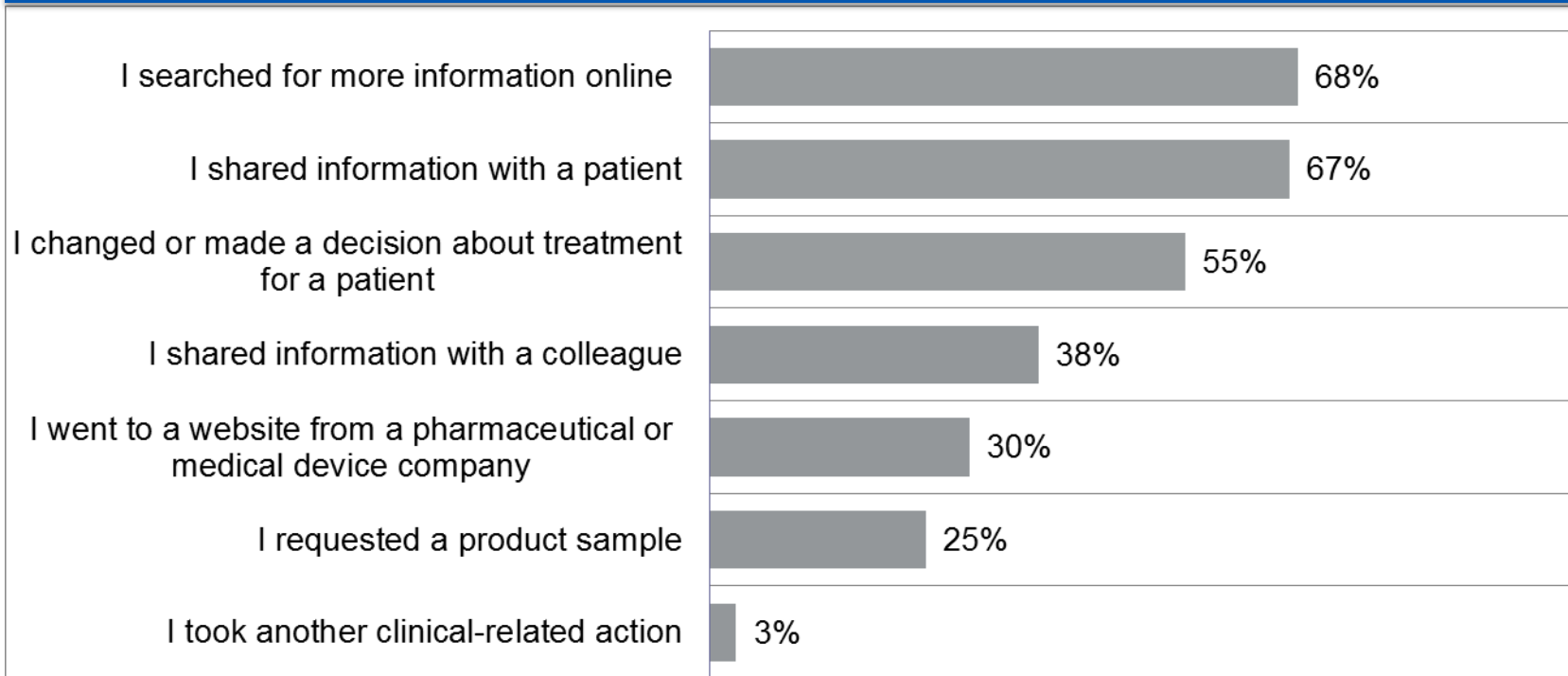
Areas clicked first when looking for clinical/treatment information



# 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**

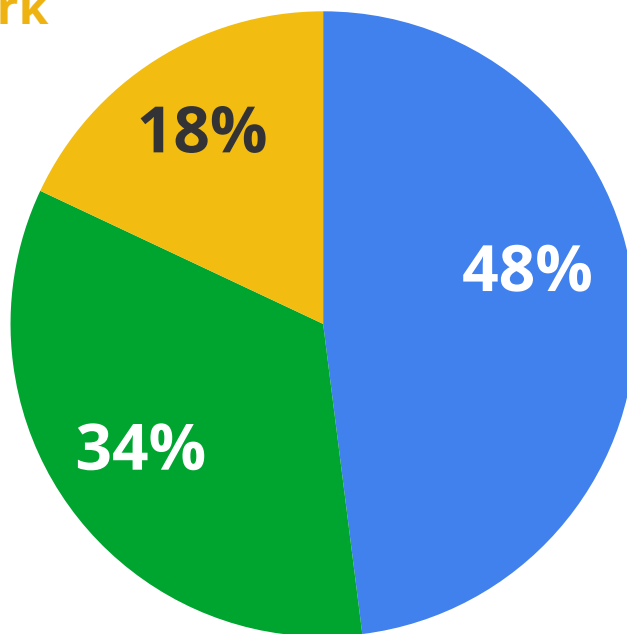
*Asked among physicians who own a smartphone*

# 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

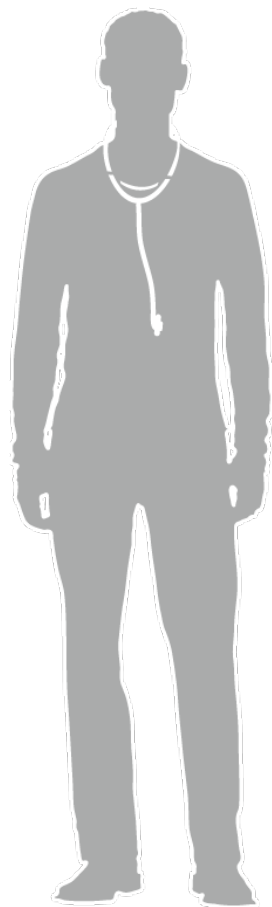
Mobile  
professional app



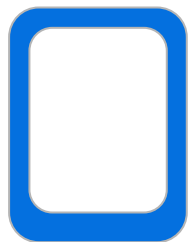
Search engine



# Mobile search is a daily activity



smartphone searchers  
**49%** search at least daily



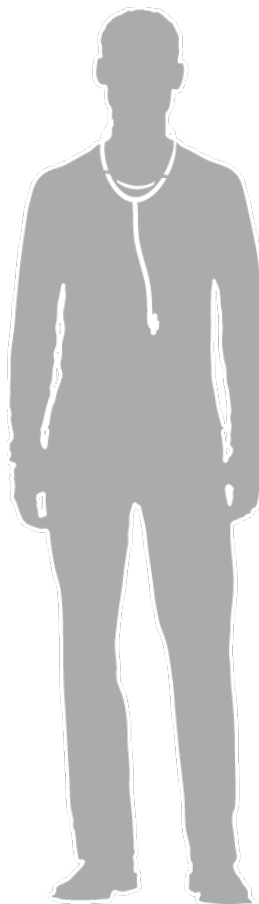
tablet searchers  
**39%** search at least daily

# 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.

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



**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 tablet, n=226

# Optimizing sites for mobile devices is critical



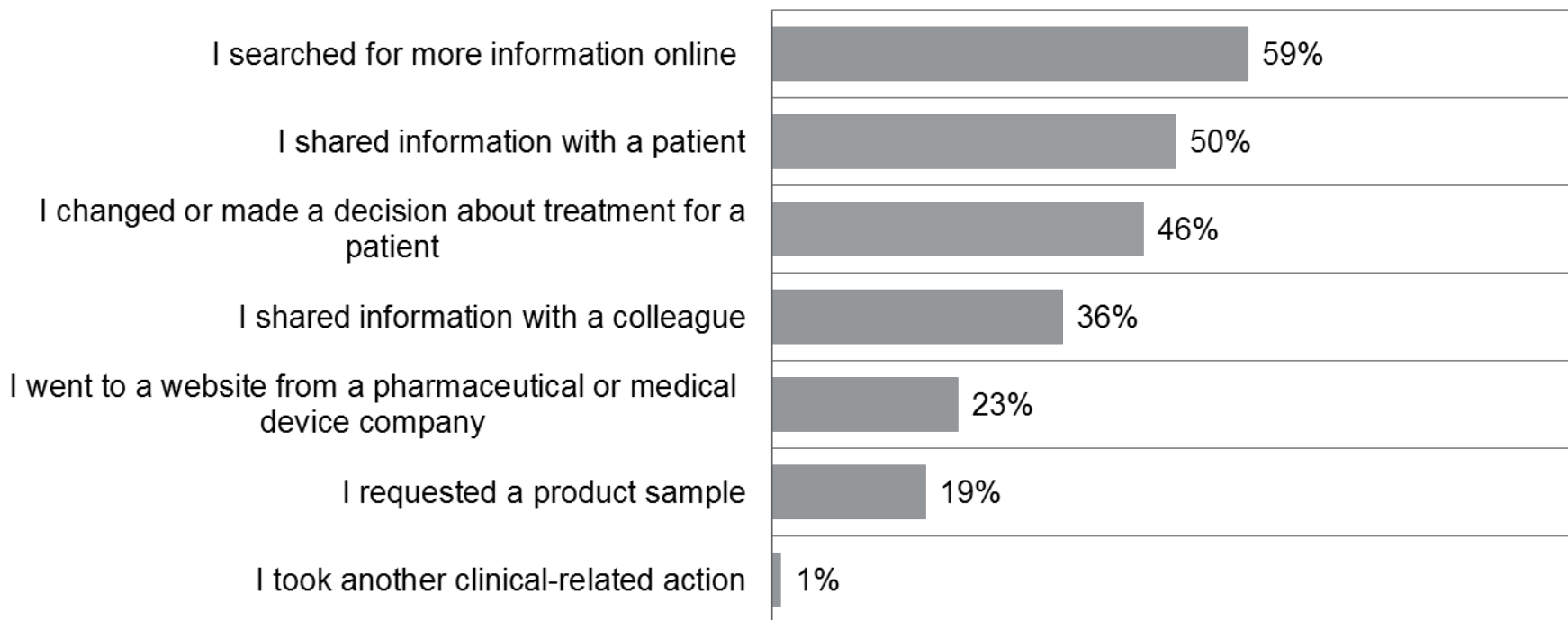
**62%** of physicians are likely to **abandon the mobile website if it's not optimized for a smartphone**

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

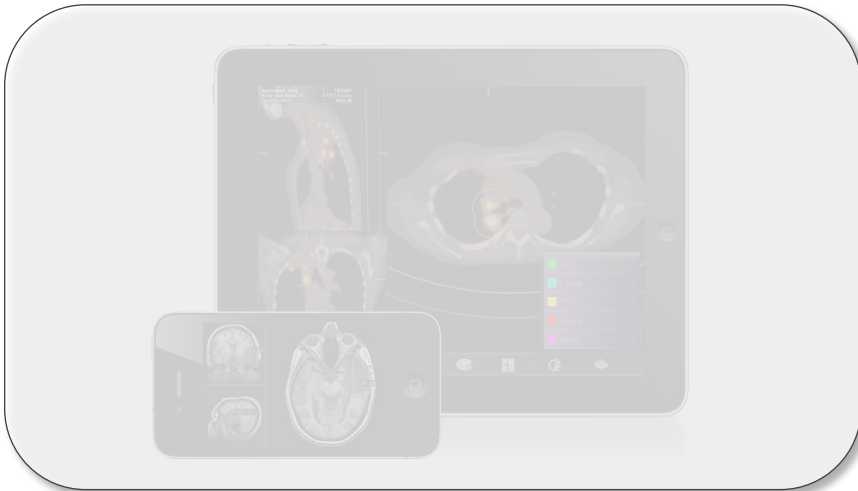
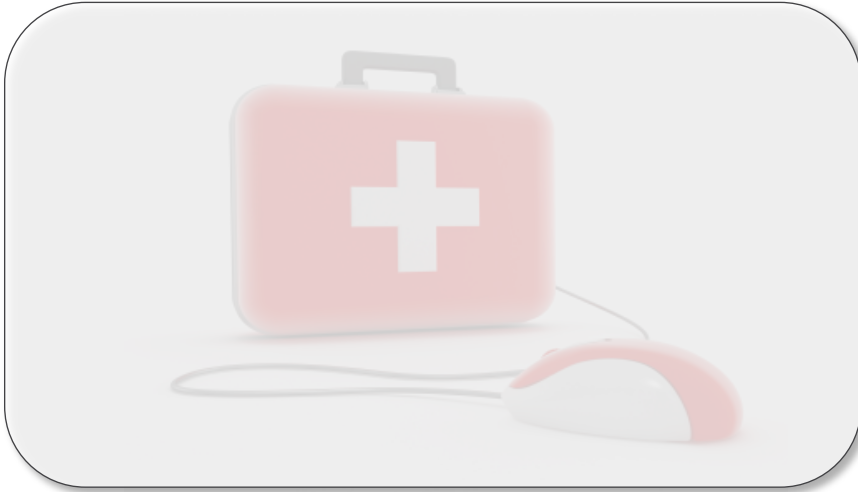
# Mobile search is action-oriented

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)**

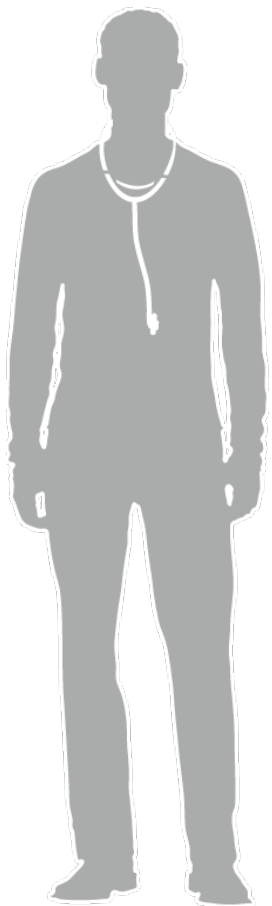


## What did we find?



**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

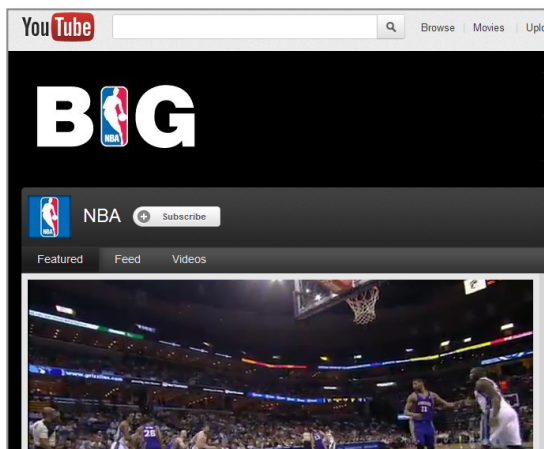
	Physicians
Continuing medical education	55%
Lectures	48%
Disease and condition information	43%
Demonstrations of medical procedures	40%
Health news	37%
Presentations from key opinion leaders (KOLs)	37%
<b>Information about a specific drug or treatment</b>	<b>36%</b>
Medical device information	23%
<b>Video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

← **26%** are interested

← **29%** are interested



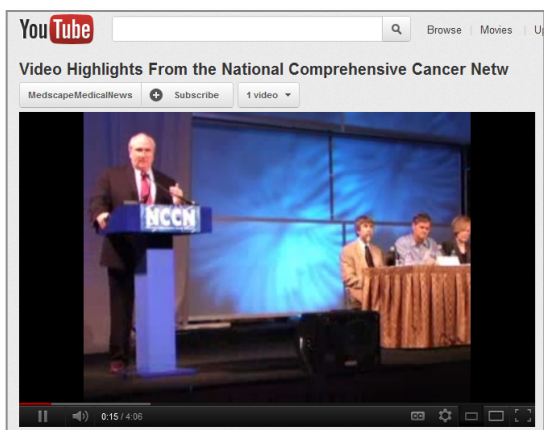
# YouTube is viewed for work and play



Watch videos for personal purposes on...

**87%** YouTube  
**24%** Facebook  
**20%** Hulu

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



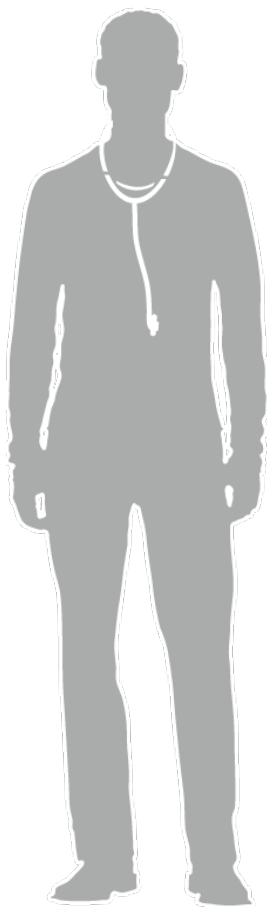
Watch videos for professional purposes on...

**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**

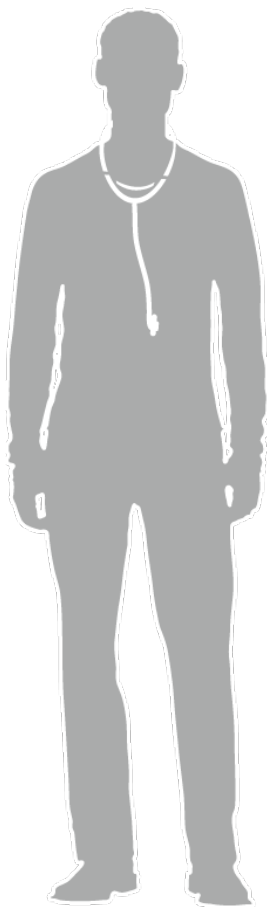
**Easy interface, easy search,  
comfortable using site**

**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.

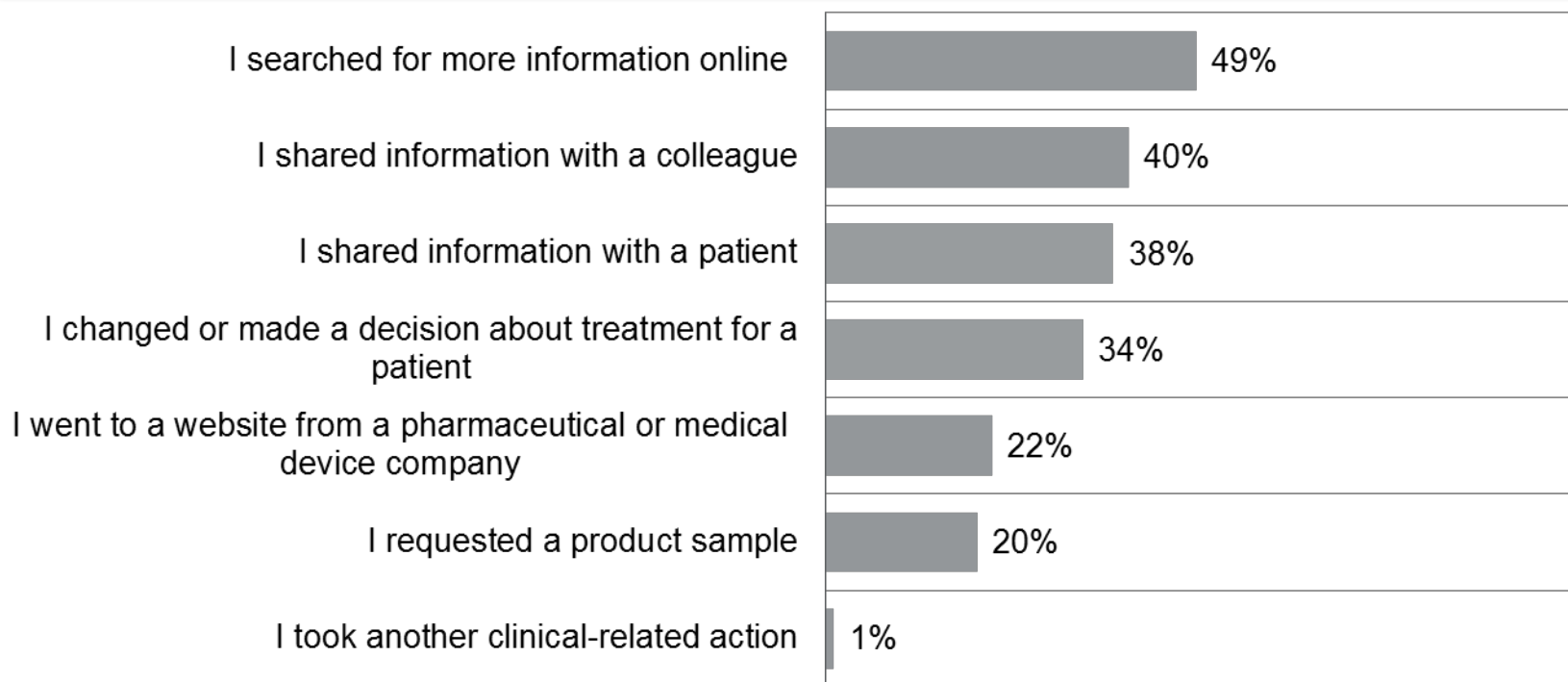
Chicago  
Cardiologist

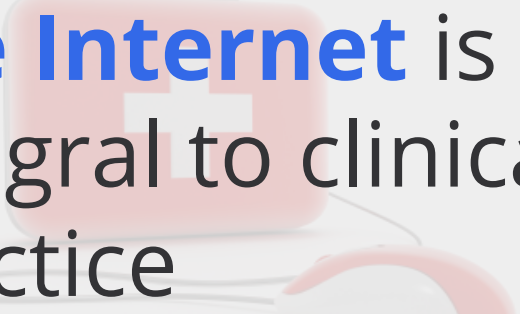


# Online video drives clinical action

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



# Screen to Script

## The Doctor's Digital Path to Treatment

June 2012