

Physician Virtual Communications Survey

How physicians are using virtual conferences and online CME to improve health outcomes



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Executive Summary

More physicians are embracing virtual events as part of their professional education. This survey bears out that there seems to be a strong correlation between a perception of better outcomes of healthcare and better virtual programming. Producers of event-oriented content are more likely to succeed with their audience by making their virtual programs better and more relevant, offer more convenient times for both live and through on-demand virtual events, make them easy to participate in and provide better access to information and resources. Make them mobile-friendly, not just suited for desktops or even laptops. Make the programs more entertaining, fast paced, and offer differing viewpoints. And use presenters with very clear voices.

Purpose

This survey was conducted in order to identify trends and preferences by physicians in their use of computing devices, webcasts and virtual events in their professional life, and to help better understand the perceived benefits and problems that emerge from increased participation in virtual conferences, educational webcasts and continuing medical education (CME).

This summary report contains data and charts derived from the questions, as well as interpretations of that data by MedData Group analysts.

Methodology

- In March, 2012, 971 physicians in the United States answered a ten-question survey entitled Physician Virtual Communications Survey after being contacted via email. The email list used to invite physicians to participate in the survey is owned and actively maintained by MedData Group.
- The survey was conducted through SurveyMonkey.com and sponsored by On24 and MedData Group.
- The only incentive used was that the respondent would be entered in a drawing to win an iPad3. Additionally, it was mentioned that they could view a summary of this survey once posted on the MedData Group website.

Demographics

- Just more than half (51%) of the respondents are within a Medical Group Practice, most closely followed by Hospital/Medical Center or Multi Hospital System (29%), and Ambulatory Care/Outpatient Clinic (9%).
- The prevailing age of the responding physicians was between their 40s and 50s (62%), with 16% in their 30s, and 22% in their 60s or more.
- The most common Primary Medical Specialties are Internal Medicine (22%), Pediatrics (17%), Family Practice (12%), OB/GYN (7%), and Psychiatry (5%). Other specialties were identified, with none individually larger than 5%.

Key Points

Inviting doctors to your webcast? Here is a prescription for success:

- Perfect Timing – Think carefully about scheduling your webcast. Though many believe that during office hours is best, the research shows that 63% of doctors say that early evening is the most convenient time to attend.
- Virtual events and webcasts are noted as becoming more frequent (76%) and easier to participate in (49%). More than half of the physicians responded that they are becoming more suitable as an alternative to physical events.
- More Compelling Content – Make your webcast stand out by providing interesting, relevant content. While most physicians say that virtual events are becoming more popular, only 27% say that webcast content is becoming more relevant.
- More CME webcasts should be made for online - 84% of physicians surveyed say they prefer to attend CME online. And take those dinner meetings online as well - 29% of the respondents said they would prefer virtual dinner meetings over their physical counterparts.
- Content Availability – 80% of doctors say that the ability to view “on-demand” content at their convenience is the greatest benefit of virtual communication.
- Mobile Device Access – Make sure your webcast can be viewed on devices such as iPhones and iPads. Research shows that 74.3% of doctors either already own or will be buying a mobile device within the next six months.
- The Webcast Presenter – A webcast is only as good as the people presenting. Subject matter expertise is a requirement. Most doctors, 61.8%, also believe that having a clear/non-nasally voice is one of the most appealing presenter characteristics.
- Travel takes time away from patient care and home life – More than half of physicians see a strong benefit of virtual events as avoiding the hassles of travel.

Cross Tabulation Key Findings

1. Age - while there was some variance between two groups when split almost evenly by age - Under 50 year olds (48%) compared with those indicating their age as Over 50 (52%), the numbers were slight to just around 10 points difference on most of the questions. This held true even when the age split was into two groups organized as Under 40 (19%) and Over 40 (81%). Here are some of the more significant areas where there may be a generational split:
 - On computers and mobile phones [Questions 1 and 2]:
 - There is no significant difference between the age groups in either current use or plan to purchase by device.
 - On a shift away from in-person towards virtual events [Questions 3 and 4]:
 - No significant difference was seen with for-credit CME, non-accredited medical education or medical device training. But the older group indicated a 6 and 7 point preference for attending online pharmaceutical education or dinner meetings over the younger group.
 - Age did not seem to be a factor in how often the physicians participated or did not participate in virtual events [Question 4]
 - On the convenience of attending a live virtual event
 - The older group was 5 points more likely to attend an early evening event than the younger group. [Question 5]
 - The older group was 5 points more likely to perceive a benefit of avoiding the hassles of travel by attending a virtual event, and they also were 4 points more likely to give credit for there could be better overall patient care [Question 6].

- The older group is also about 4 points more likely than the younger group to credit VEs for being increasingly easy to participate in; 6 points more likely to credit them as being more suitable as an alternative for physical events; and 5 points more likely to credit VEs for providing better access to information and resources. [Question 7]
- On the characteristics that make for an appealing virtual event presenter [Question 8]:
- Clearly, a clear voice is most preferred by both groups, however the older group is 8 points ahead in their preference for a clear, non-nasally voice; and 4 points ahead for preferring a blunt and direct approach.
- And the largest generation gap answer is with the older group's being 10 points more open to questions and different viewpoints than the younger group.

2. Preference for Virtual Events - those that do so often, somewhat often or very often (56%) compared with Not often (44%) [Question 4]:

- The group that prefers VEs are 8 points more likely to buy an iPad in the next six months [Question 2]
- That group is 16 points more likely to prefer online CME and 8 points more likely to prefer online non-accredited medical education over in-person; 10 points more like to prefer online medical device training or online dinner meetings and 14 points more likely to prefer online pharmaceutical education [Question 3]
- This group is 15 points more likely to appreciate that they could avoid the hassles of travel through virtual events; 5 points more likely to acknowledge that they can view "on-demand" content at their convenience. [Question 6]
- Those with a preference for VEs are 7 points more likely to say that they could see a larger number of patients throughout the year; and 10 points more likely to see a benefit of spending more time with patients; 5 points more likely to see a decrease in patient costs; and 9 points more likely to see as a benefit that there could be better overall patient care. [Question 6]
- This group is more likely by 13 points to acknowledge that virtual events and webcasts are increasing in numbers; 19 points more likely to say that they are increasingly easy to participate in; 16 and 14 points more to say that they are becoming more suitable as an alternative to physical events or that they are providing better access to information and resources; [Question 7]
- This group is 11 points more likely to say that VEs are becoming more relevant to what I do [Question 7].
- And they are 10 points more likely to be open to questions and different viewpoints [Question 8]

3. Ease of participation - One of the "Holy Grails" of medical education is to see an increase in outcomes for better medical care. In Question 7, there is a strong correlation between virtual events that are perceived as easy to participate in, as more suitable as an alternative to physical events, as providing better access to information and resources, and as becoming more relevant with benefits that can be aligned with better health outcomes, such as seeing more patients, spending more time with patients, lowering patient costs and better overall patient care. The respondents split nearly in half on those who indicated positive benefits that emerge from attending virtual events (476) and those who did not specifically check the same benefits (495). The first, more positive group is:

- 18 percentage points more likely to say that VEs are Increasingly easy to participate in
- 20 points more likely to cite them as being more suitable as an alternative to physical events
- 20 points more likely to cite them as providing better access to information and resources
- 19 points more likely to be considered as more relevant to what they do.
- 6 points more likely to find early evening a more convenient time
- 19 points more likely to be "often participants" of VE than the other group
- 10 - 14 points more likely to prefer online programs over in-person

- 7 points more likely to prefer to view on-demand content at their convenience
- 7 points more likely to be planning to purchase an iPad and 5 points more likely to be purchasing a laptop in the next six months.
- Two-thirds of this group most prefers a presenter with a clear voice, which is 9 points greater than the group that does not cite better health outcomes.
- 60% say that they are more open to questions and different viewpoints - which is 20 points greater than the other group
- 40 % are eager for a fast-paced delivery, which is 8 points higher than the other group.

Survey Invitation

Subject: How do you leverage your webcasts and virtual events?



Dear Dr. <Last Name>,

ON24, the leading provider of webcast and virtual event solutions, in partnership with MedData Group, a leading provider of healthcare information services, would like to invite you to give us your opinions!

The use of webcasts and virtual events has grown dramatically in healthcare over recent years. From CME to virtual conferences, physicians are participating in ever more events of growing diversity.

We would like to get your opinions in a very brief survey to help better understand physicians' use of webcasts and virtual events in their professional life. Your answers will be completely anonymous and the survey should only take 3-5 minutes of your time.

In return for completing this brief survey, you will automatically be entered in a drawing to Win a New iPad 3!

Thank you in advance for a few minutes of your time. The results of the survey will be made available on the MedData Group website.

Sincerely,
ON24 and MedData Group

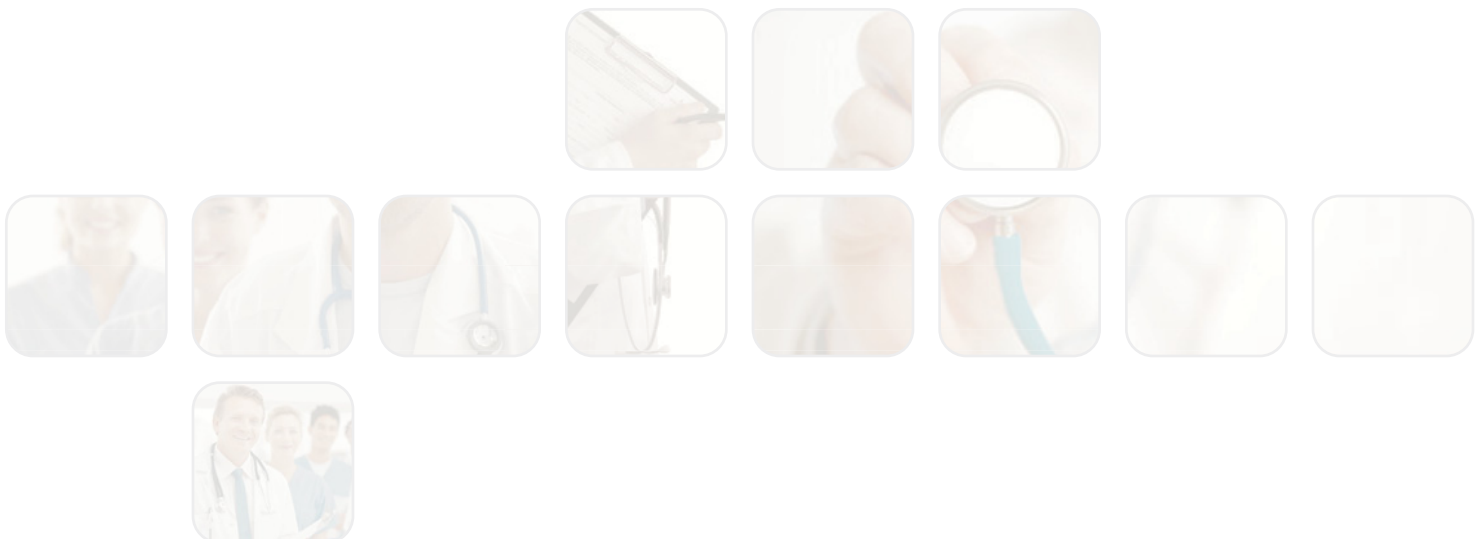
TAKE SURVEY

[Click Here To Take Survey](#)

Overall Survey Response Charts and Tables

1. Which one of the following computing devices do you currently use? (Please select all that apply)

	Response Percent	Response Count
iPad	45.1%	438
iPhone	52.4%	509
Tablet (Not iPad)	10.1%	98
Smartphone (Not iPhone)	25.1%	244
Desktop Computer	75.9%	737
Laptop Computer	76.5%	743
Macbook Air	7.2%	70
Ultrathin Laptop (Not Macbook Air)	2.6%	25
Palm Pilot	5.6%	54
None of these	0.1%	1
Answered Question		971
Skipped Question		0



2. Which one of the following computing devices do you plan to buy in the next six months? (Please select all that apply)

		Response Percent	Response Count
iPad		29.2%	284
iPhone		17.1%	166
Tablet (Not iPad)		4.1%	40
Smartphone (Not iPhone)		5.9%	57
Desktop Computer		6.7%	65
Laptop Computer		10.6%	103
Macbook Air		8.5%	83
Ultrathin Laptop (Not Macbook Air)		3.4%	33
Palm Pilot		0.4%	4
None of these		39.3%	382
		Answered Question	971
		Skipped Question	0

3. Which one of the following in person programs would you prefer to attend online? (Please select all that apply)

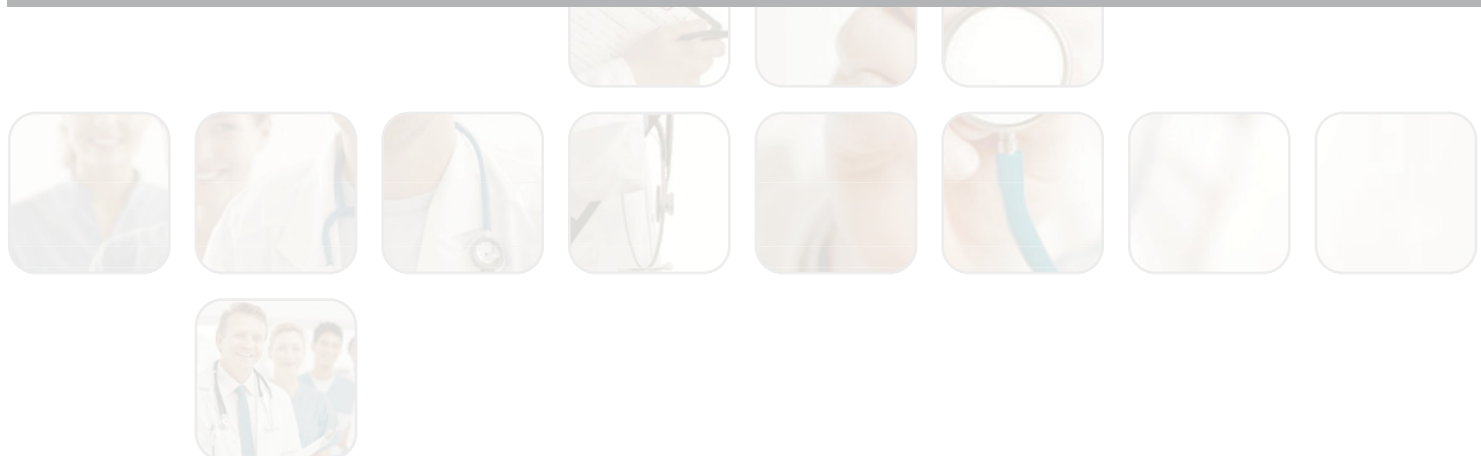
		Response Percent	Response Count
For-credit CME		84.1%	817
Non-accredited medical education		18.2%	177
Medical device training		27.1%	263
Pharmaceutical education		31.6%	307
Dinner meetings		29.4%	285
None of these		7.6%	74
		Answered Question	971
		Skipped Question	0

4. How often do you participate in any type of virtual event or webcast? (Please select one)

		Response Percent	Response Count
Very often		6.4%	62
Often		18.5%	180
Somewhat often		31.5%	306
Not often		43.6%	423
		Answered Question	971
		Skipped Question	0









5. What time of the day is most convenient for you to attend a live virtual event or webcast? (Please select all that apply)

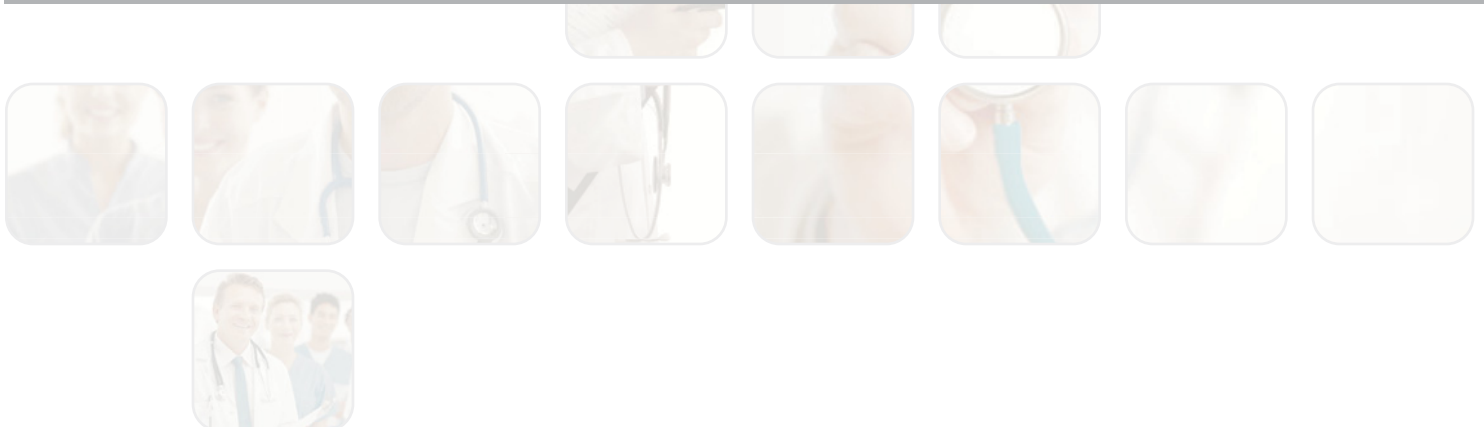
		Response Percent	Response Count
Before 9 AM		6.3%	61
In the morning		4.8%	47
Lunch Time		15.9%	154
In the afternoon		10.0%	97
Early evening		63.0%	612
		Answered Question	971
		Skipped Question	0



Physician Virtual Communications Survey

6. Which one of the following benefits do you think could emerge if you were able to attend more conferences, meetings and CME events virtually? (Please select all that apply)

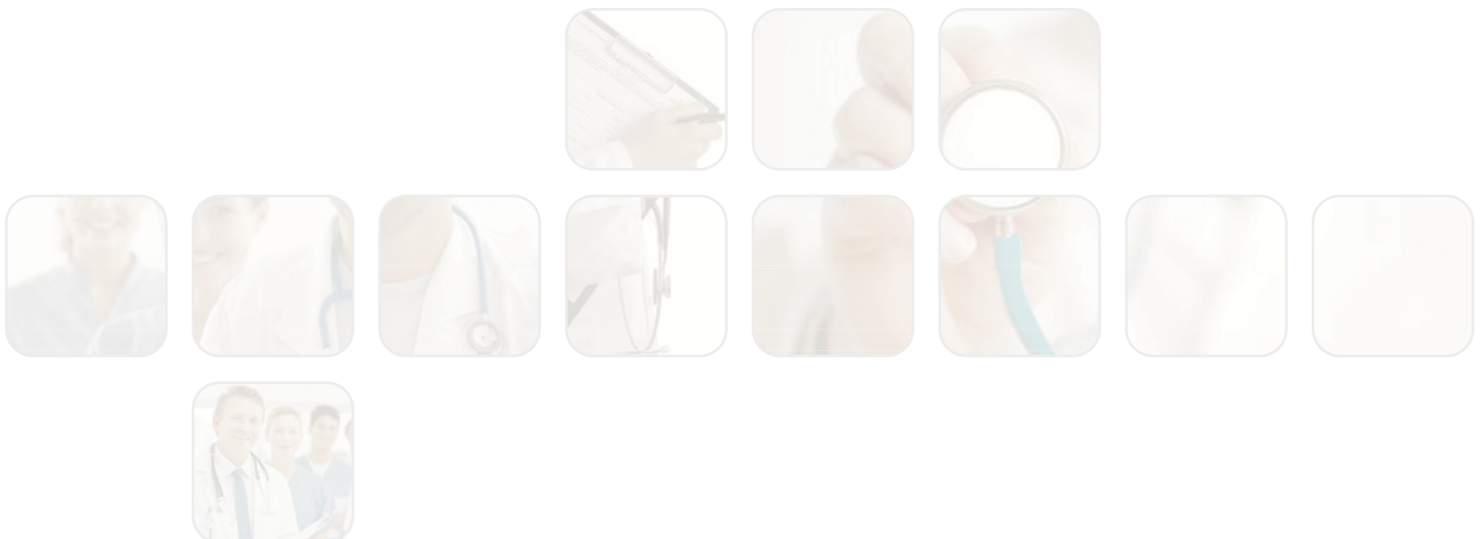
		Response Percent	Response Count
I could avoid the hassles of travel to places I'd rather not visit		53.3%	518
I could view "on-demand" content at my convenience		80.3%	780
I could see a large number of patients throughout the year		13.4%	130
I could spend more time with patients		18.3%	178
Patients costs could potentially be decreased		9.7%	94
I could spend more time at home, relaxing and having fun		45.1%	438
There could be better overall patient care		35.1%	341
None of these		3.9%	38
		Answered Question	971
		Skipped Question	0



Physician Virtual Communications Survey








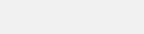

7. What trends do you see with respect to virtual events and webcasts? (Please select all that apply)

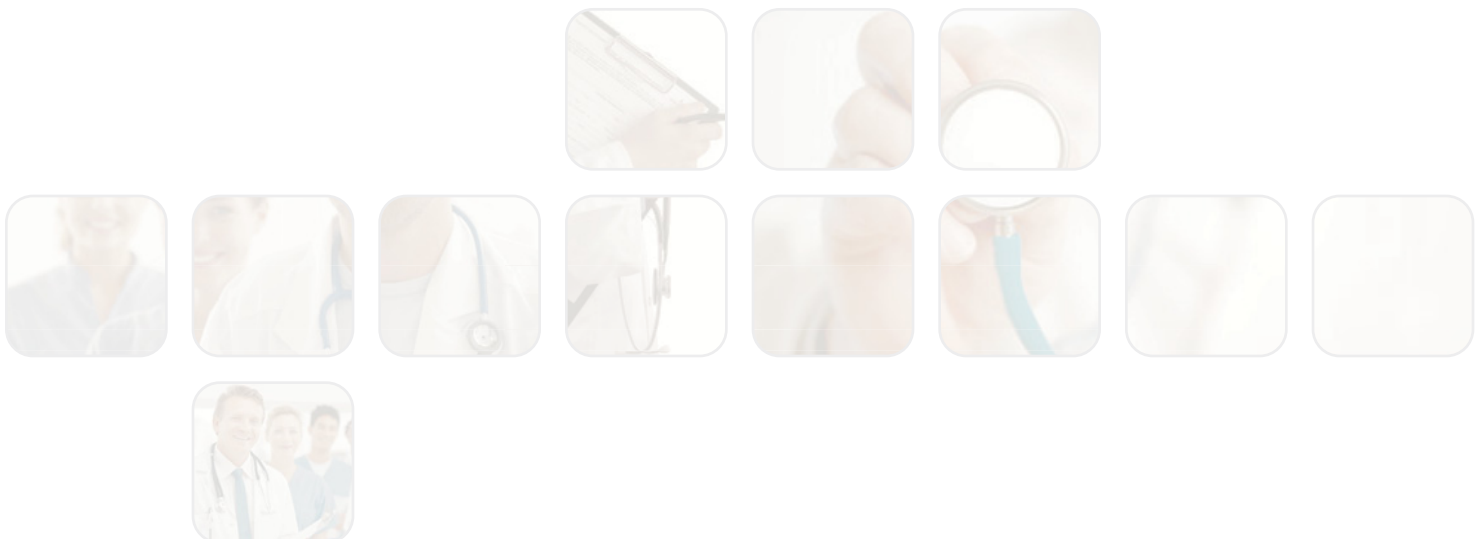
		Response Percent	Response Count
They are increasing in number		75.5%	733
They are increasingly easy to participate in		49.0%	476
They are becoming more suitable as an alternative to physical events		51.3%	498
They are providing better access to information and resources		43.7%	424
They are becoming more relevant to what I do		26.6%	258
None of these		4.9%	48
		Answered Question	971
		Skipped Question	0



Physician Virtual Communications Survey

8. while most medical professionals agree that impressive credentials and subject matter expertise are important characteristics in any virtual event presenter, what some other characteristics you think are appealing in a virtual event presenter? (Please select all that apply)

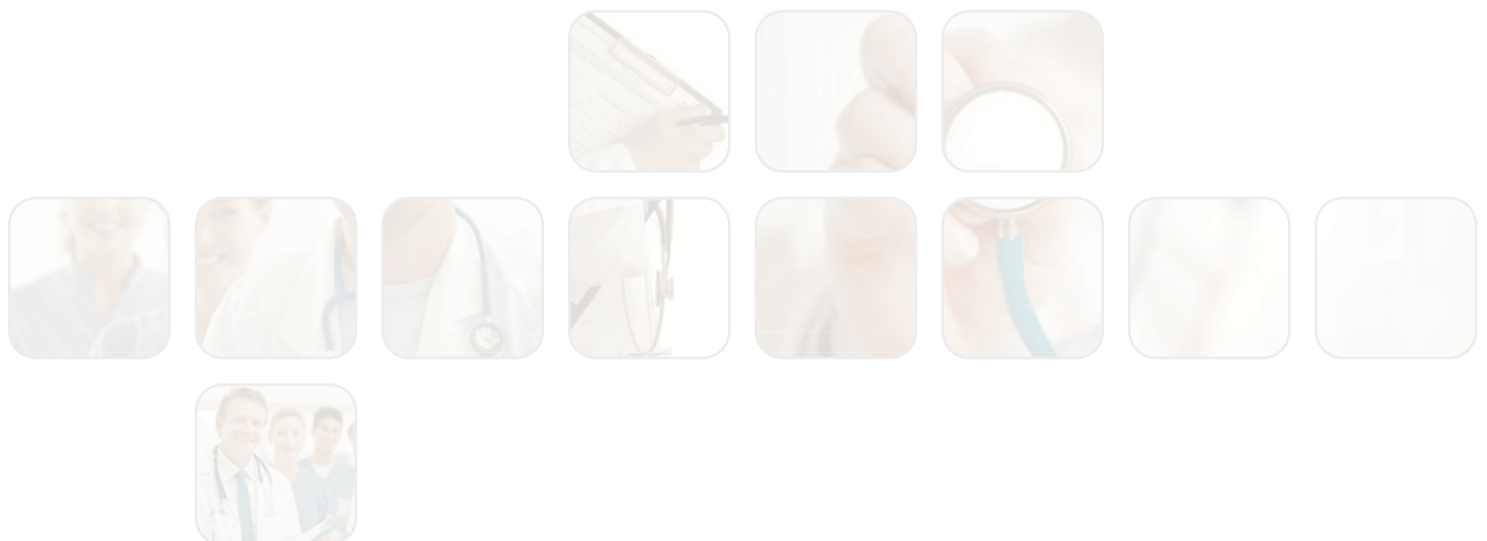
		Response Percent	Response Count
Quickness		8.8%	85
Fast-paced delivery		36.1%	351
Slow, methodical delivery		10.9%	106
Clear voice / non-nasally		61.8%	600
Distinctive accent		6.7%	65
Blunt and direct		25.8%	251
Funny / entertaining		41.8%	406
Open to questions and different viewpoints		52.9%	514
None of these		4.5%	44
		Answered Question	971
		Skipped Question	0



Physician Virtual Communications Survey

















9. Primary medical specialty			
		Response Percent	Response Count
Allergy / immunology		0.9%	9
Anesthesiology	■	3.9%	38
Cardiology	■	4.4%	43
Dentistry		0.1%	1
Dermatology	■	3.6%	35
Emergency medicine	■	3.2%	31
Endocrinology / Diabetes / Metabolism		2.3%	22
Family Practice	■	11.6%	112
Geriatrics		1.4%	14
Internal Medicine	■	22.0%	213
Medical Genetics		0.2%	2
Neurology	■	2.7%	26
Nursing		0.2%	2
Obstetrics and Gynecology	■	6.5%	63
Oncology	■	4.2%	41
Ophthalmology		1.4%	14
Orthopedics		2.3%	22
Other	■	3.6%	35
Otoralyngology		1.4%	14
Pathology		2.2%	21
Pediatrics	■	16.5%	160
Physical Medicine and Rehab		1.3%	13
Plastic Surgery		1.0%	10
Preventative Medicine		0.4%	4
Psychiatry	■	5.0%	48
Radiology		0.6%	6
Suregy	■	3.6%	35
Urology		1.4%	14
		Answered Question	968
		Skipped Question	3

10. Age		Response Percent	Response Count
20s		0.6%	6
30s	■	15.9%	150
40s	■	31.1%	293
50s	■	30.5%	287
60s	■	17.5%	165
70+		4.3%	40
		Answered Question	941
		Skipped Question	30



Physician Virtual Communications Survey

11. Type of healthcare organization affiliation

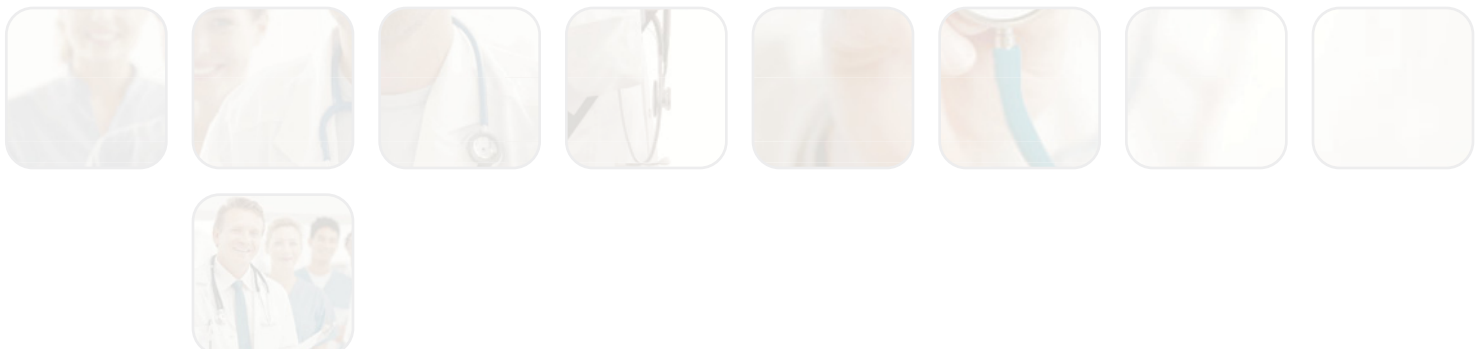
		Response Percent	Response Count
Medical Group Practice		51.3%	495
Hospital / Medical Center / Multi-Hospital System		29.0%	280
HMO / PPO / Other Managed Care Organization		2.8%	27
Ambulatory Care / Outpatient Clinic		8.6%	83
Home Care		0.5%	5
Long Term Care / Nursing Home		1.1%	11
Other Health Organization		1.6%	15
Healthcare Payer / Insurance Company		0.6%	6
Federal / State / Municipal Health Agency		3.3%	32
research		2.1%	20
Education		5.9%	57
Pharmaceutical / Biotechnology / Biomedical Company		0.1%	1
Medical Device Company		0.1%	1
Other Healthcare Vendor		0.5%	5
Consultant		3.3%	32
Other		5.8%	56
		Answered Question	964
		Skipped Question	7

Survey Cross Tabulation Tables and Charts

A. Comparison of Physicians who cited virtual events as offering benefits relating to better outcomes for patient care, versus those that did not.

What Trends do you see with respect to virtual events and webcasts? (Please select all that apply)					
Group that cited as benefits Better outcome for patient care	Which one of the following benefits do you think could emerge if you were able to attend more conferences, meetings and CME events virtually? (Please select all that apply)				Response totals
	I could see a larger number of patients throughout the year	I could spend more time with patients	Patients costs could potentially be decreased	There could be overall better patient care	
They are increasing in number	83.8% (109)	76.4% (136)	84.0% (79)	79.5% (271)	77.7% (370)
They are increasingly easy to participate in	70.0% (91)	70.8% (126)	68.1% (64)	57.8% (197)	58.2% (277)
They are becoming for suitable as an alternative to physical events	66.9% (87)	68.5% (122)	69.1% (65)	62.5% (213)	61.6% (293)
They are providing better access to information and resources	57.7% (75)	54.5% (97)	68.2% (59)	58.9% (201)	54.0% (257)
They are becoming more relevant to what I do	43.8% (57)	41.0% (73)	41.5% (39)	39.3% (134)	36.3% (173)
None of these	0.8% (1)	1.7% (3)	1.1% (1)	3.5% (12)	2.7% (13)
Answered question	130	178	94	94	476
Skipped question					0

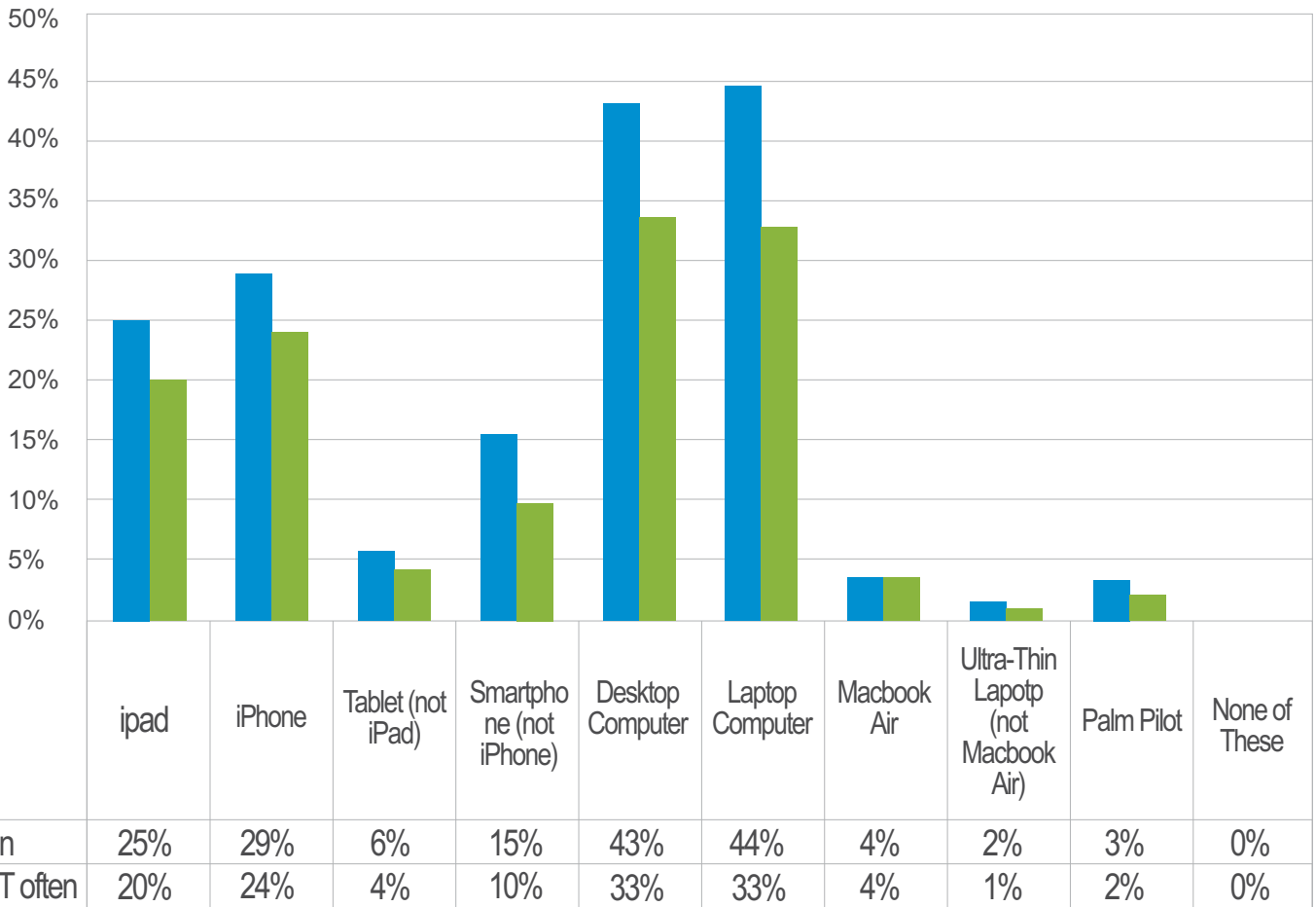
I could avoid the hassles of traveling to places I'd rather not visit	I could view "on-demand" content at my convenience	I could spend more time at home, relaxing or having fun	None of these	None of these
76.7% (174)	75.6% (288)	73.3% (137)	63.2% (24)	73.3% (363)
51.1% (116)	42.3% (161)	48.7% (91)	18.4% (7)	42.2% (199)
51.5% (117)	44.4% (169)	44.4% (83)	15.8% (6)	41.4% (205)
38.8% (88)	36.7% (140)	40.1% (75)	13.2% (5)	33.7% (167)
19.4% (44)	18.6% (71)	21.9% (41)	2.6% (1)	17.2% (85)
4.0% (9)	5.0% (19)	7.5% (14)	23.7% (9)	7.1% (35)
227	381	187	38	495
Skipped question				0



B. Comparison of physicians who participate in virtual events (VE) often versus those who do not participate often

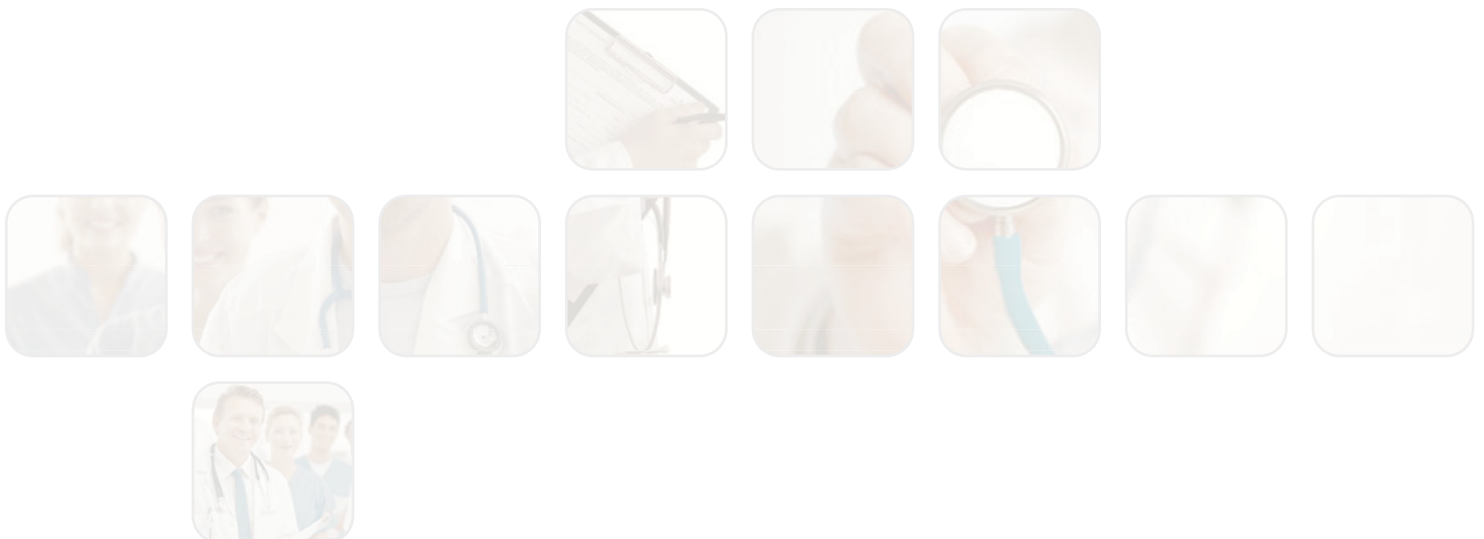
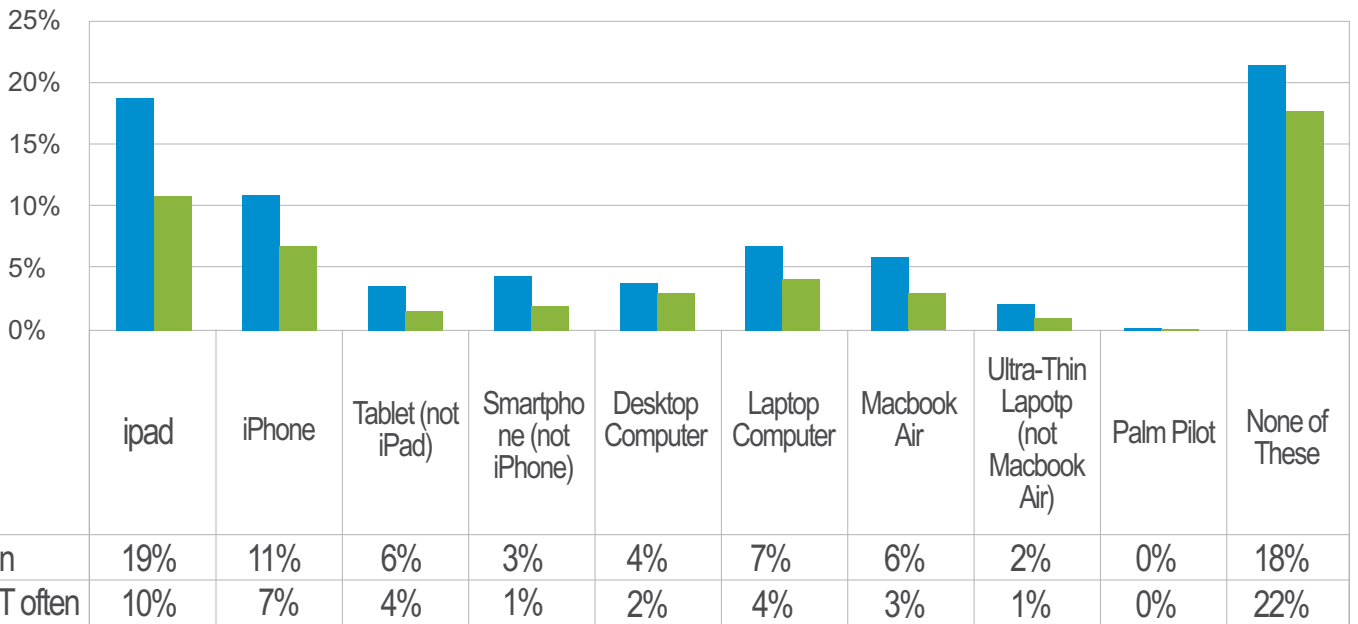
Question 1

Which of the following computing devices do you currently use?



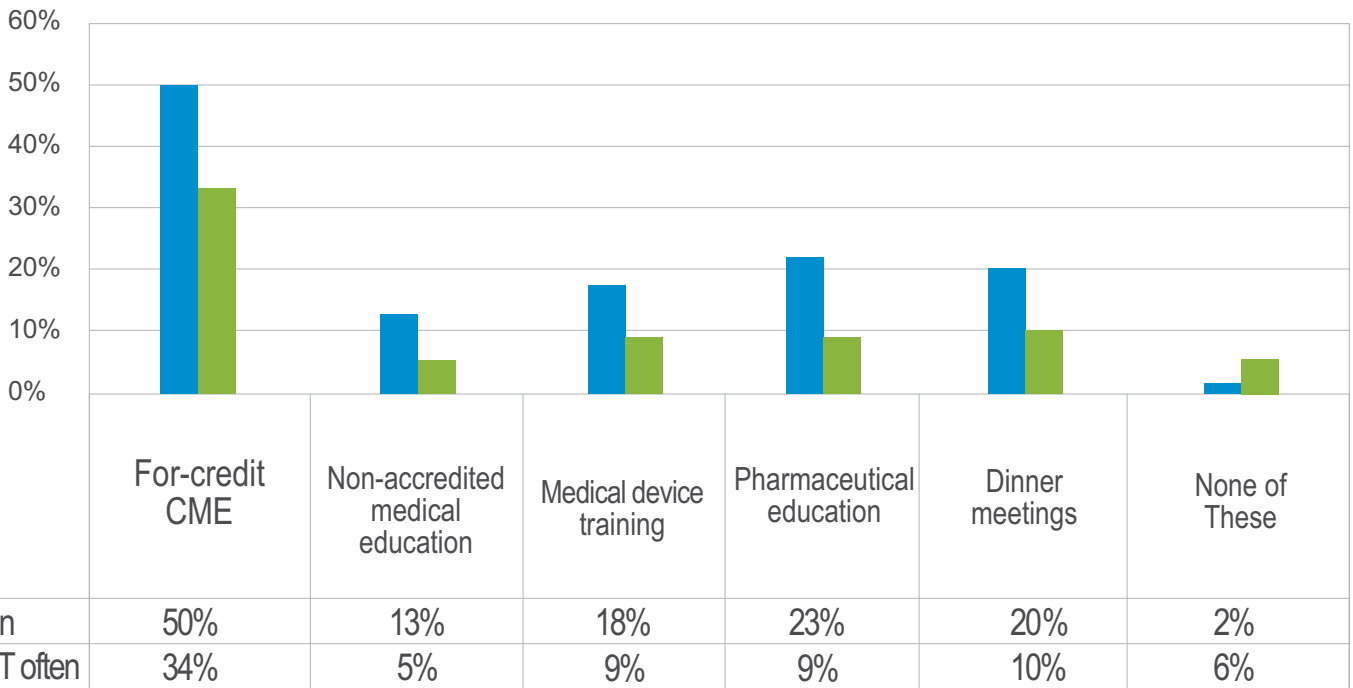
Question 2

Which of the following computing devices do you plan to buy in next six months? (Please select all that apply)



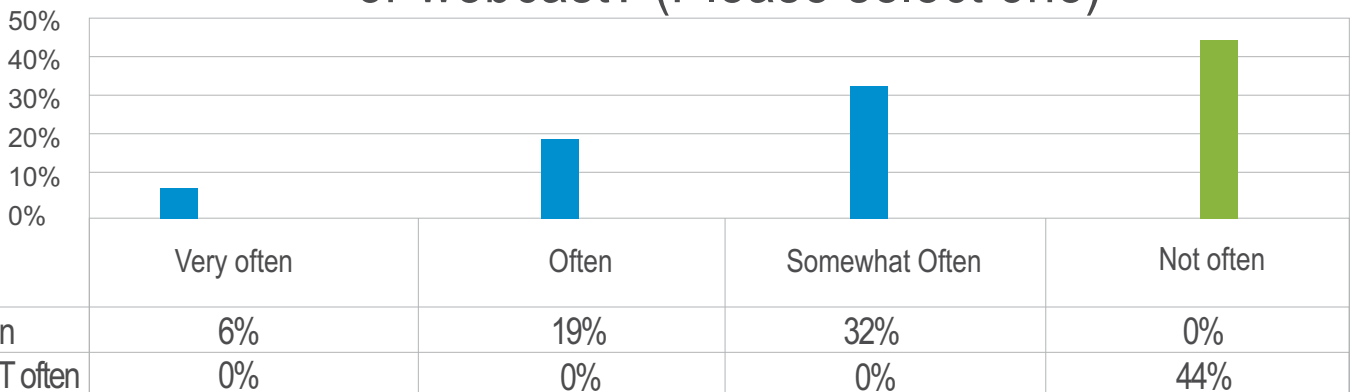
Question 3

Which one of the in-person programs would you prefer to attend online? (Please select all that apply)



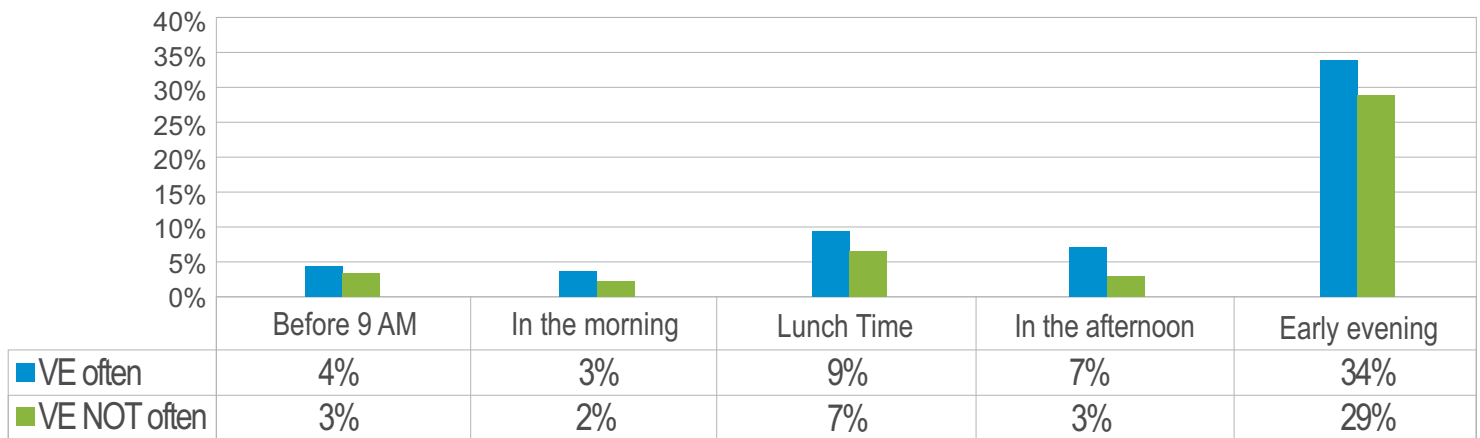
Question 4

How often do you participate in a virtual event or webcast? (Please select one)



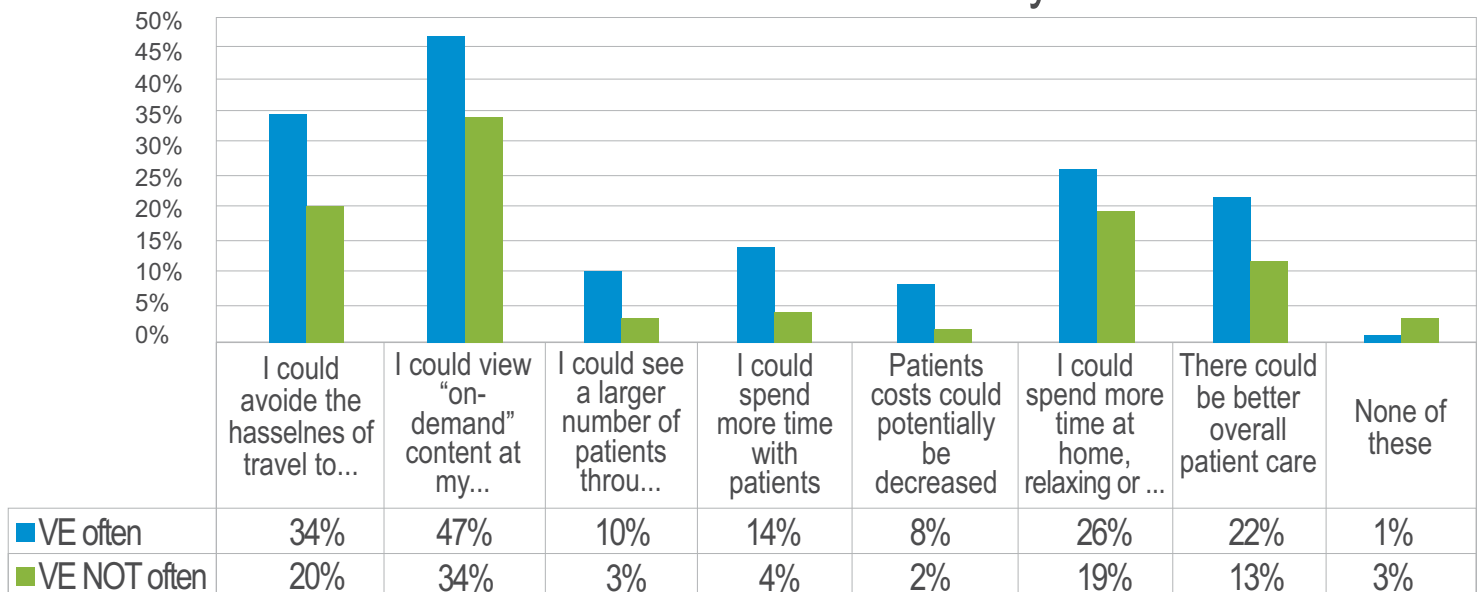
Question 5

What time of the day is most convenient for you to attend a live virtual event or webcast?
(Please select one)



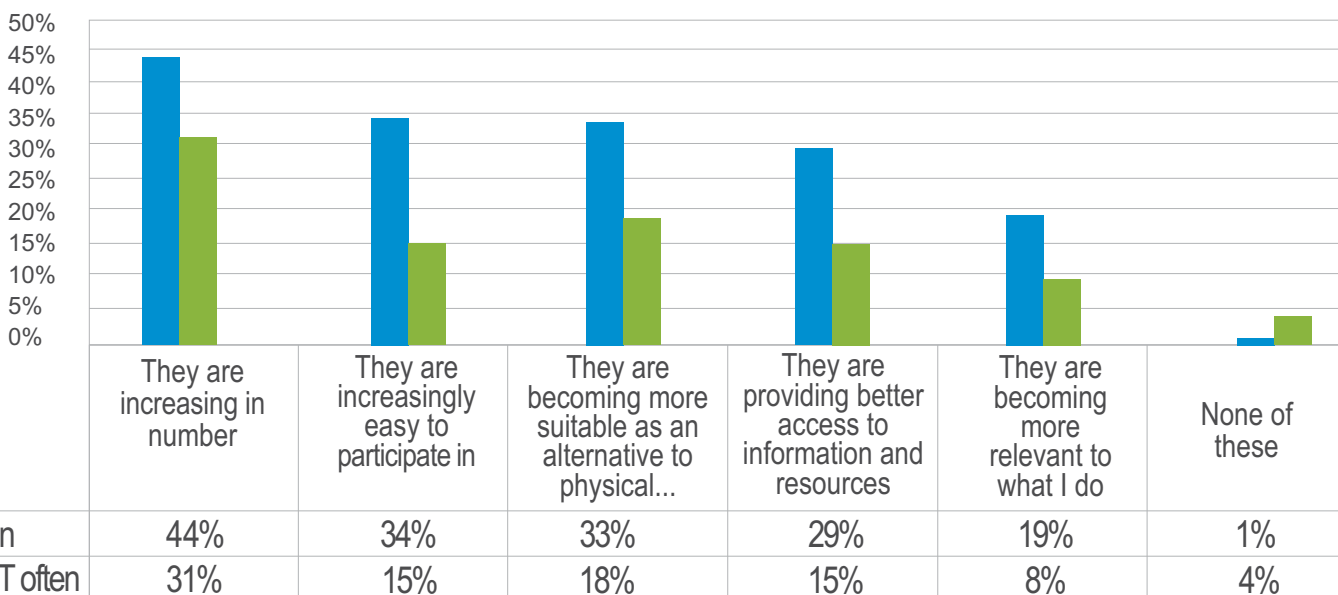
Question 6

Which of the following benefits do you think could emerge if you were able to attend more conferences, meetings and CME events virtually?



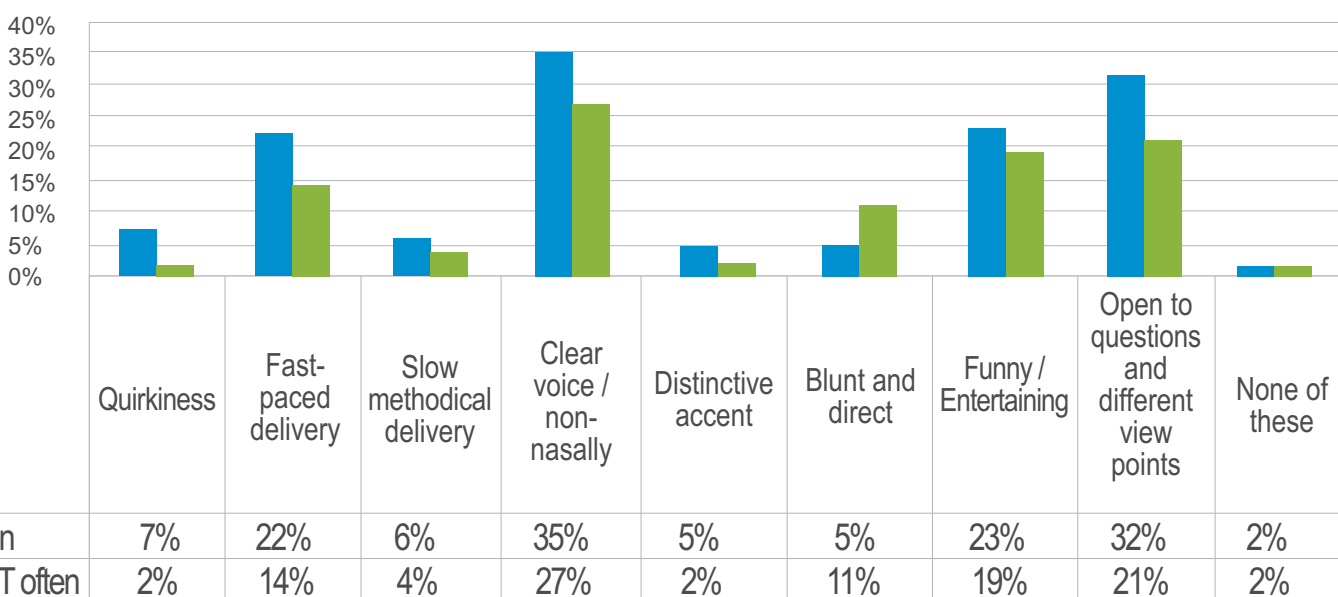
Question 7

What trends do you see with respect to virtual events and webcasts? (Please select one)

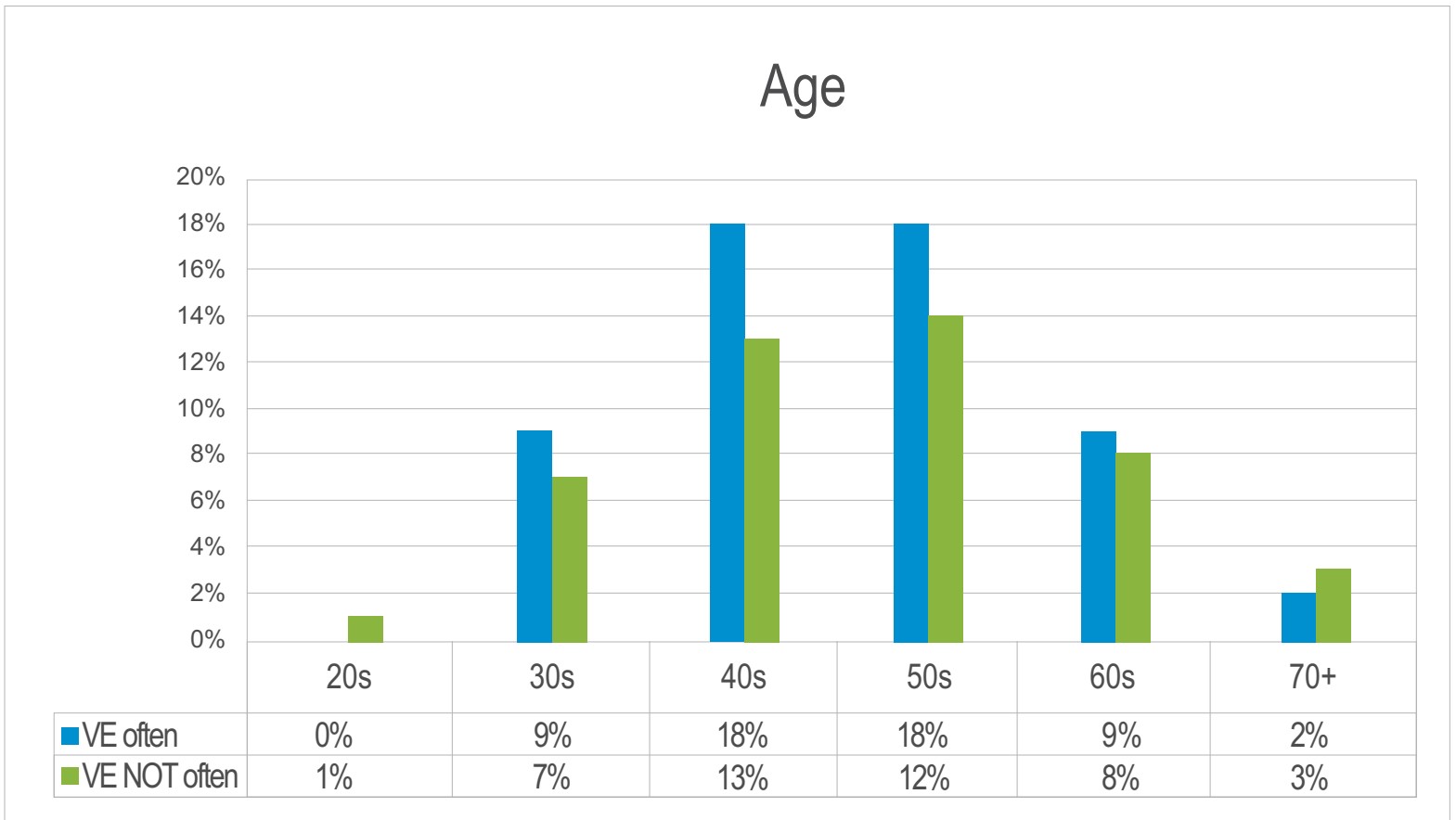


Question 8

Appealing characteristics of a virtual presenter?



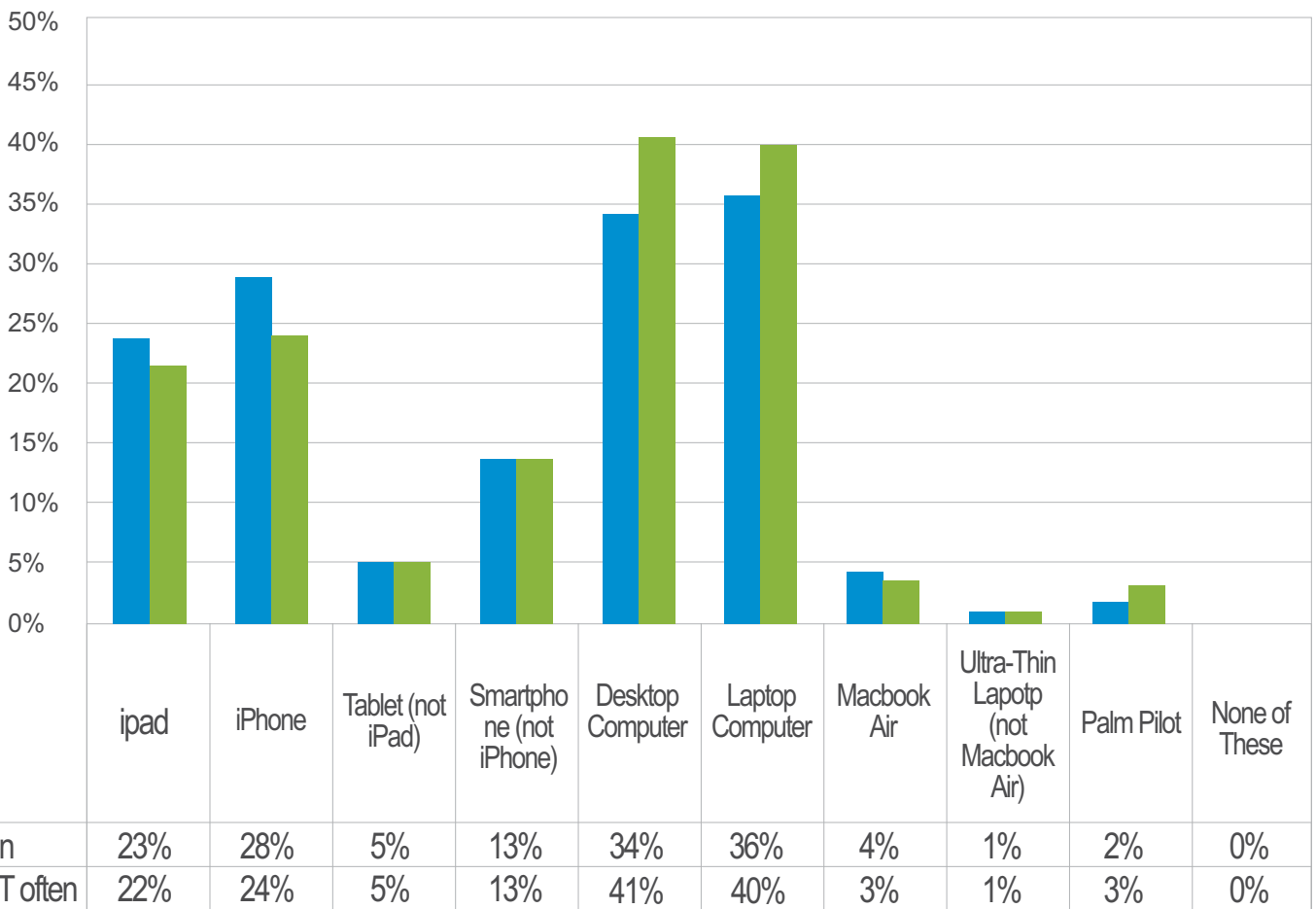
Question 10



C. Comparison of physicians over 50 years of age and less than 50 years of age.

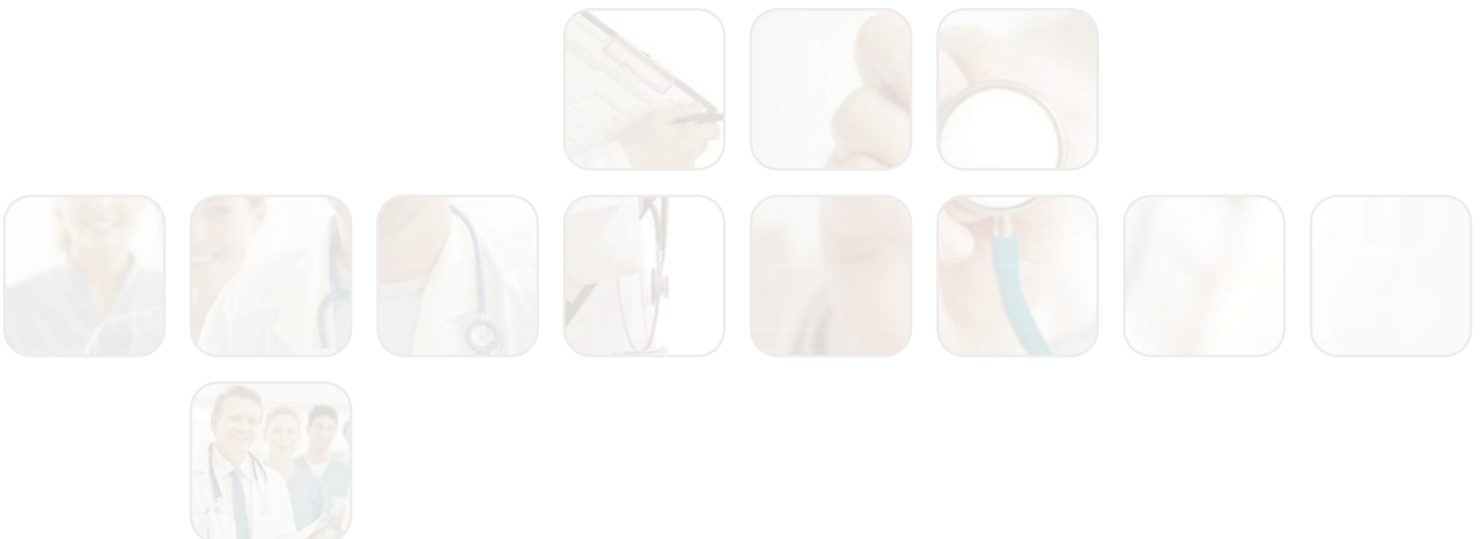
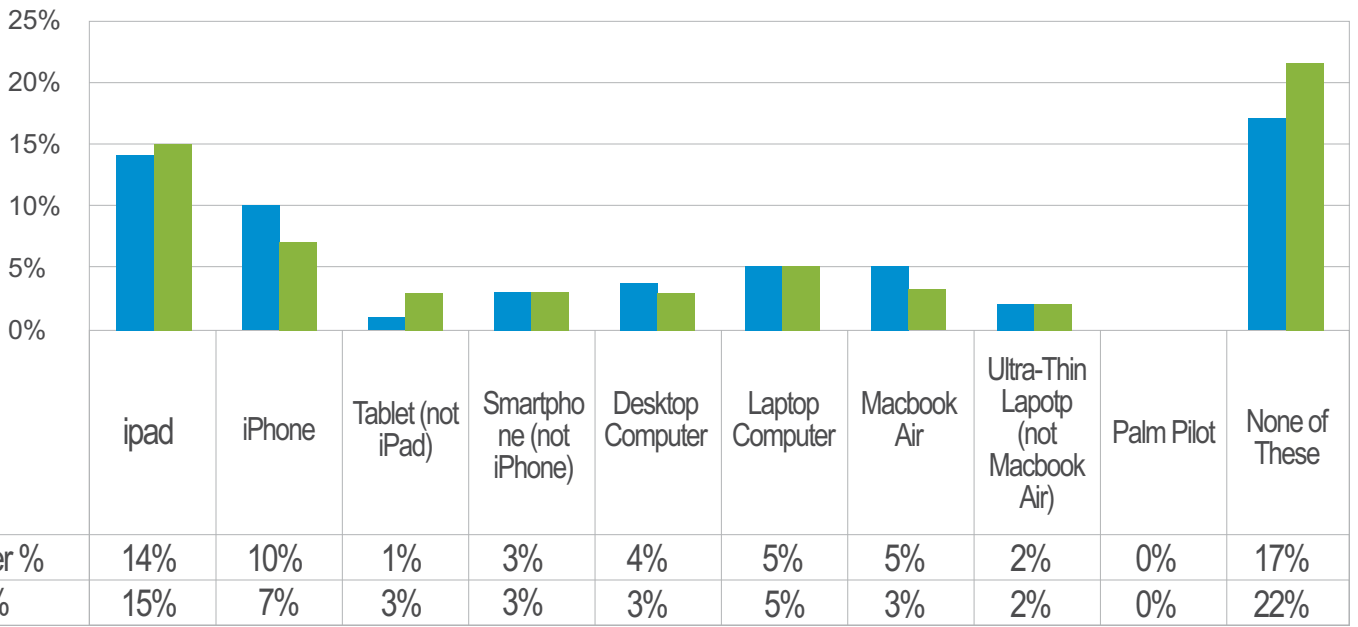
Question 1

Which of the following computing devices do you currently use?



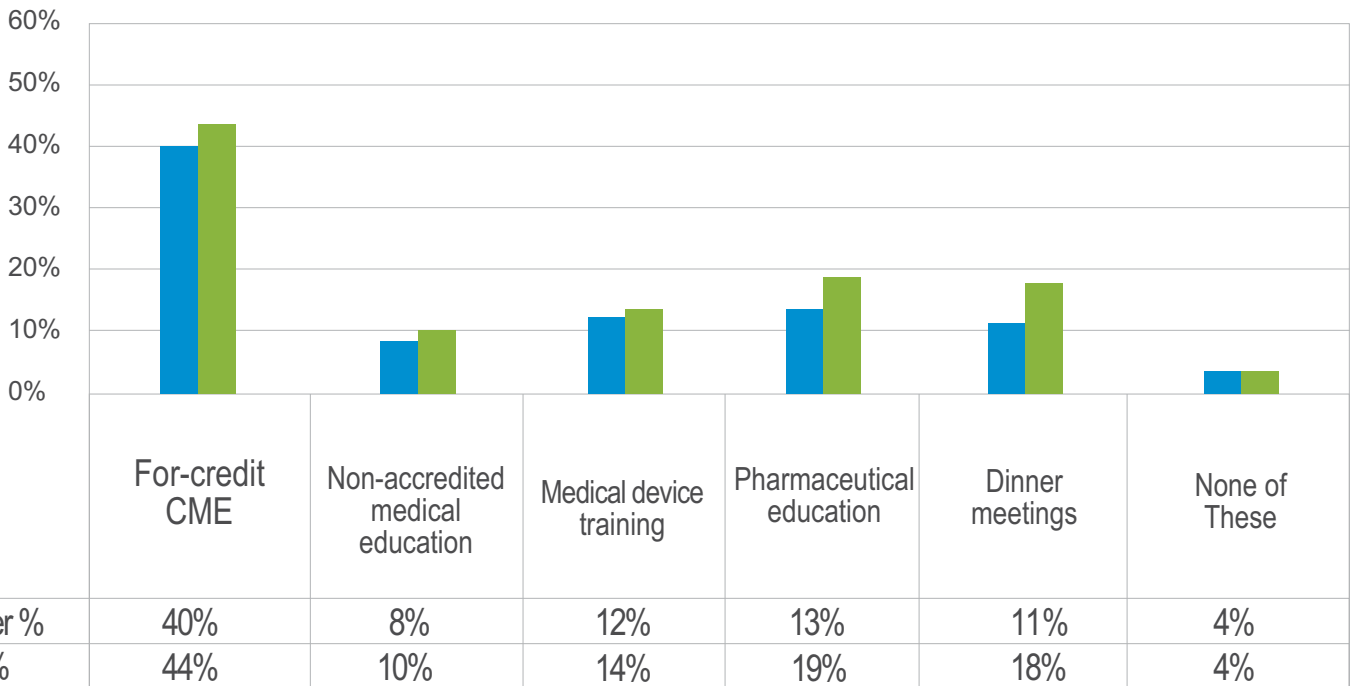
Question 2

Which of the following computing devices do you plan to buy in next six months? (Please select all that apply)



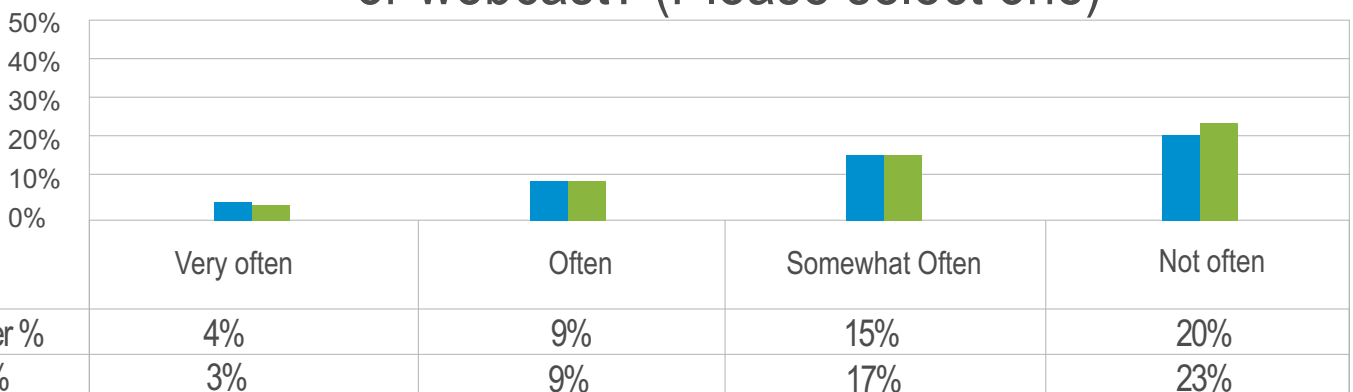
Question 3

Which one of the in-person programs would you prefer to attend online? (Please select all that apply)



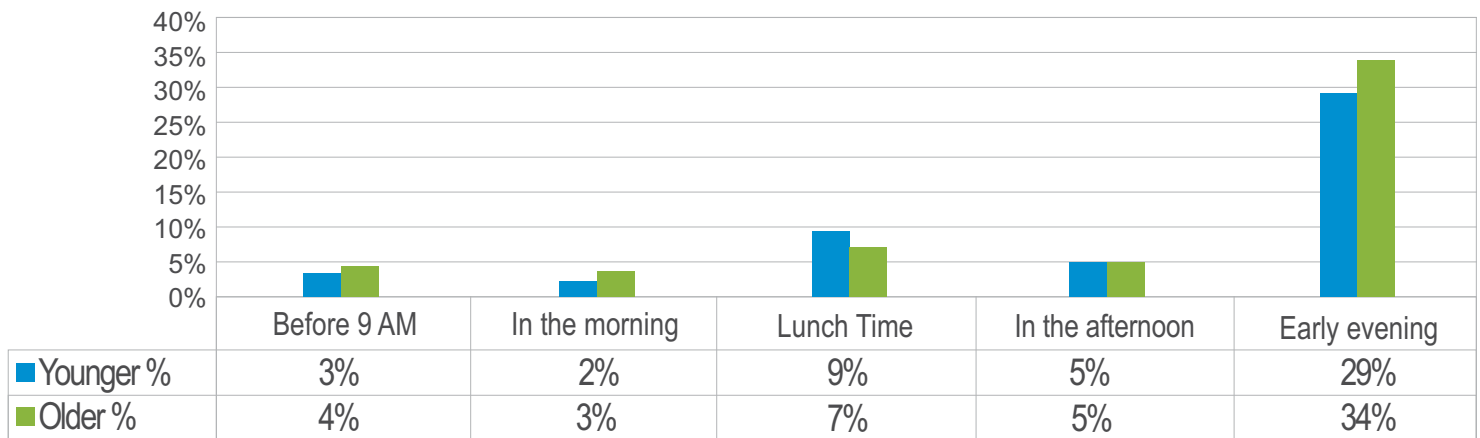
Question 4

How often do you participate in a virtual event or webcast? (Please select one)



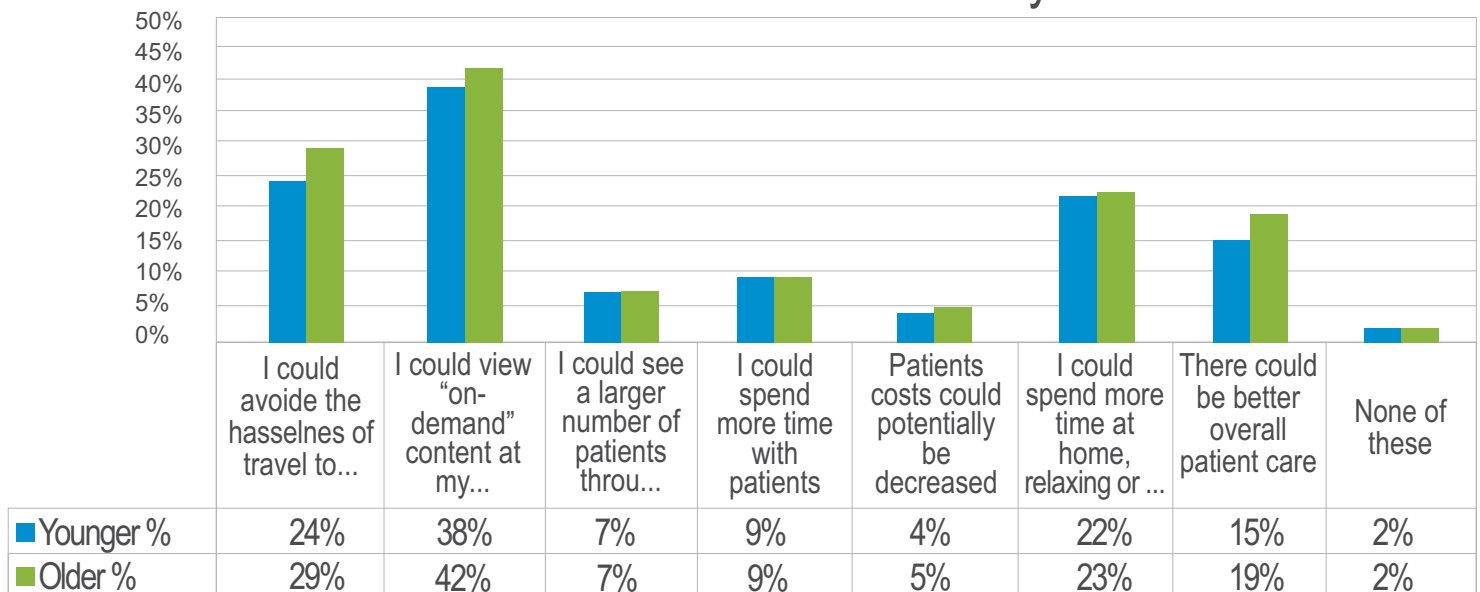
Question 5

What time of the day is most convenient for you to attend a live virtual event or webcast?
(Please select one)



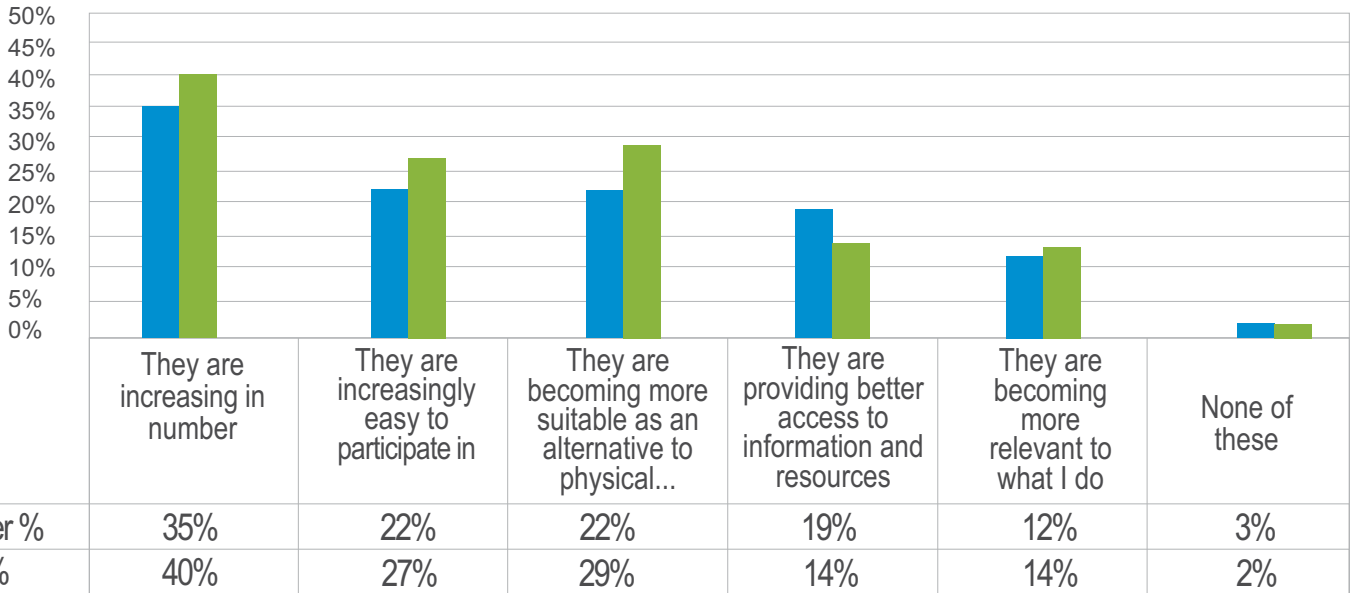
Question 6

Which of the following benefits do you think could emerge if you were able to attend more conferences, meetings and CME events virtually?



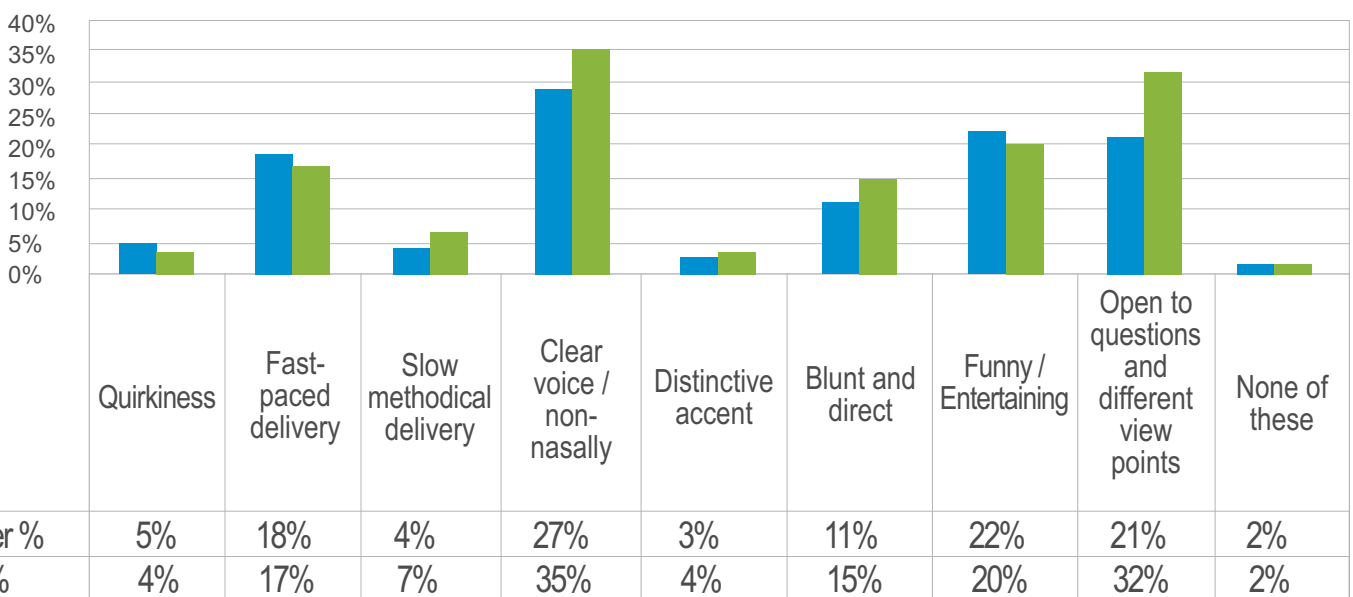
Question 7

What trends do you see with respect to virtual events and webcasts? (Please select one)



Question 8

Characteristics most appealing in a virtual presenter?



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