

EPOCRATES 2013 MOBILE TRENDS REPORT

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# Maximizing Multi-Screen Engagement Among Clinicians

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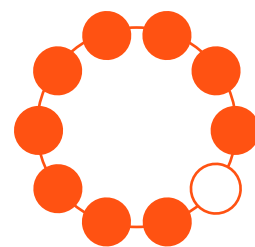
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# 2013 Mobile Trends Report

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The second annual Epocrates Mobile Trends Report examines the rapidly changing use of mobile technology by healthcare professionals. Mobile devices continue to transform the work lives of physicians, nurse practitioners and physician assistants, with more than four in five using smartphones every day. More than half of physicians affirm daily tablet use, as do about two in five nurse practitioners and physician assistants.

By next year, **9 in 10** healthcare providers will use smartphones, and nearly as many will have adopted tablets. Almost half of all respondents are “digital omnivores,” defined as clinicians who utilize a tablet, smartphone and laptop/desktop computer routinely in a professional capacity.



This research characterizes the growing daily role of mobile communications in medicine by providing a snapshot of how healthcare professionals utilize these devices for key tasks on a daily basis at patients’ bedsides, in the clinic, and beyond. Proactive tasks like searching for clinical information and communicating with colleagues are key drivers of mobile activity on smartphones and tablets. While the majority of charting and electronic health record (EHR) interaction is performed via laptop or desktop, nearly half of all clinicians who own a tablet commonly utilize it for EHR management and other clinical documentation.

Today’s digital omnivores express a preference for mobile screens across all professional tasks – an important behavioral shift that has potential to dramatically shape the way developers, content providers and marketers engage with clinicians as the three-screen workflow becomes the norm. As physicians and other healthcare professionals continue to shift their work-related tasks to mobile devices, they must overcome technological hurdles challenging them from completing some of their most important tasks, namely interacting with electronic health records and recording clinical notes in patient records.

With the Affordable Care Act already in effect and implementation of key provisions impacting clinical workflows scheduled for 2014, mobile screens are poised to play an even more critical role in providing convenient access to information and helping to ease communications among colleagues and healthcare facilities.

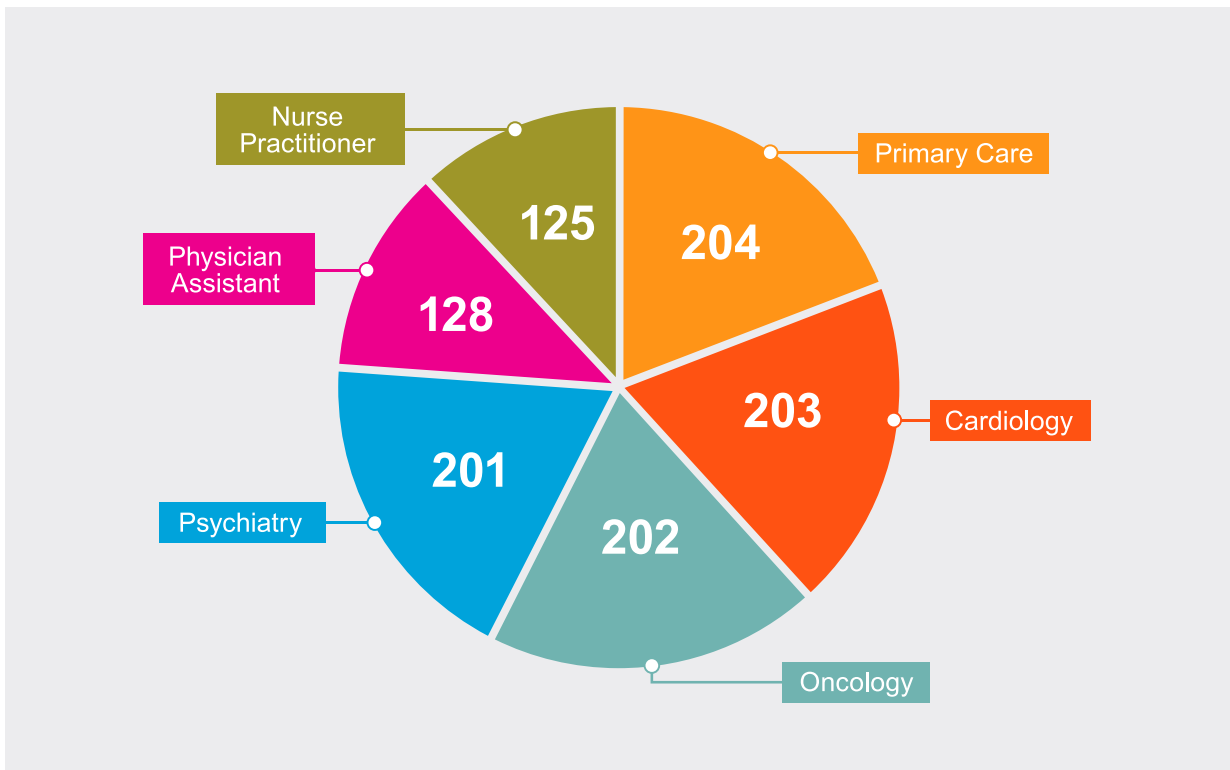
## METHODOLOGY

This report is based on a quantitative survey of 1,063 healthcare providers from the Epocrates market research panel, conducted in May 2013. The survey pool was comprised of primary care practitioners, cardiologists, oncologists, psychiatrists, nurse practitioners and physician assistants.

On average, respondents saw 308.59 patients during a typical month, and spent 93 percent of their time providing direct patient care. Average years of experience of respondents were 13.27 years.

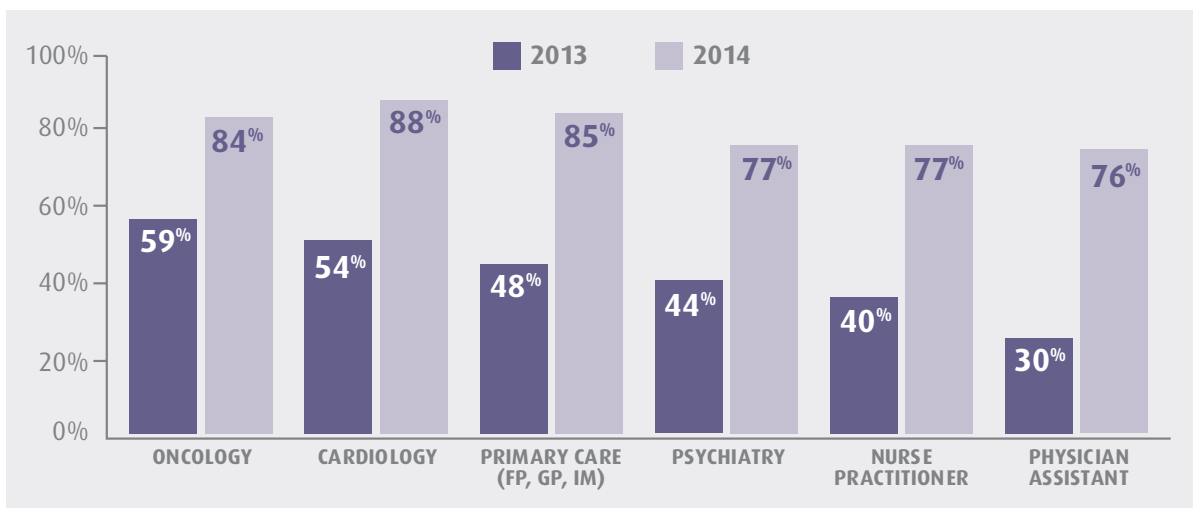
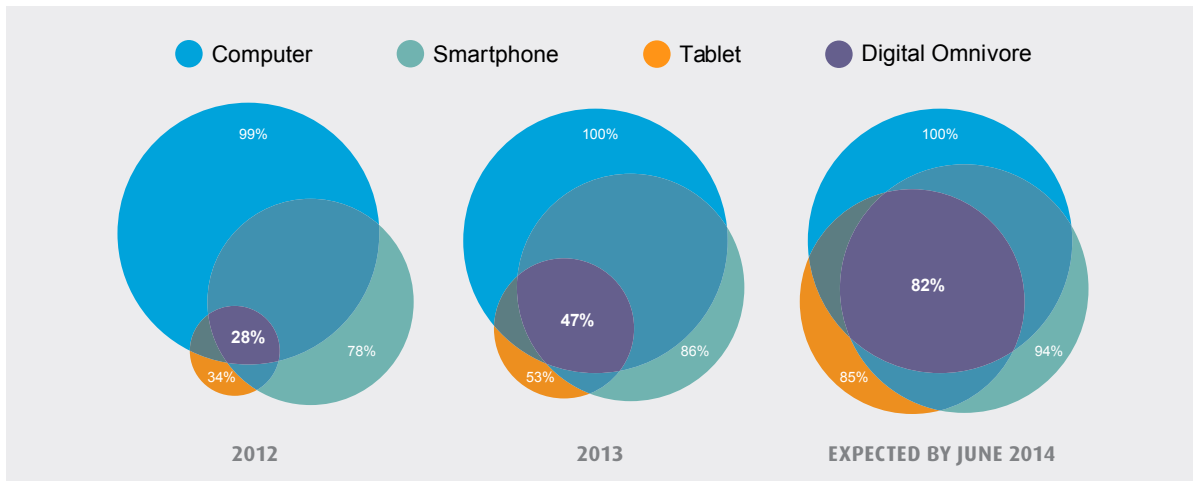
*{Margin of error is ±3 percent}*

Of the 1,063 healthcare providers who participated in this survey, the specialty and occupation representation was as follows:



## DIGITAL OMNIVORES ARE THRIVING, AND DRIVING CHANGE

Leading the charge of mobile technology integration in healthcare are digital omnivores, who utilize a tablet, smartphone and laptop/desktop computer routinely in a professional capacity. Using the 2012 Epocrates Mobile Trends Survey as a benchmark, there has been a 68% increase in digital omnivores in the last year, while 82% of healthcare professionals surveyed expect to utilize all three digital platforms within the next twelve months.



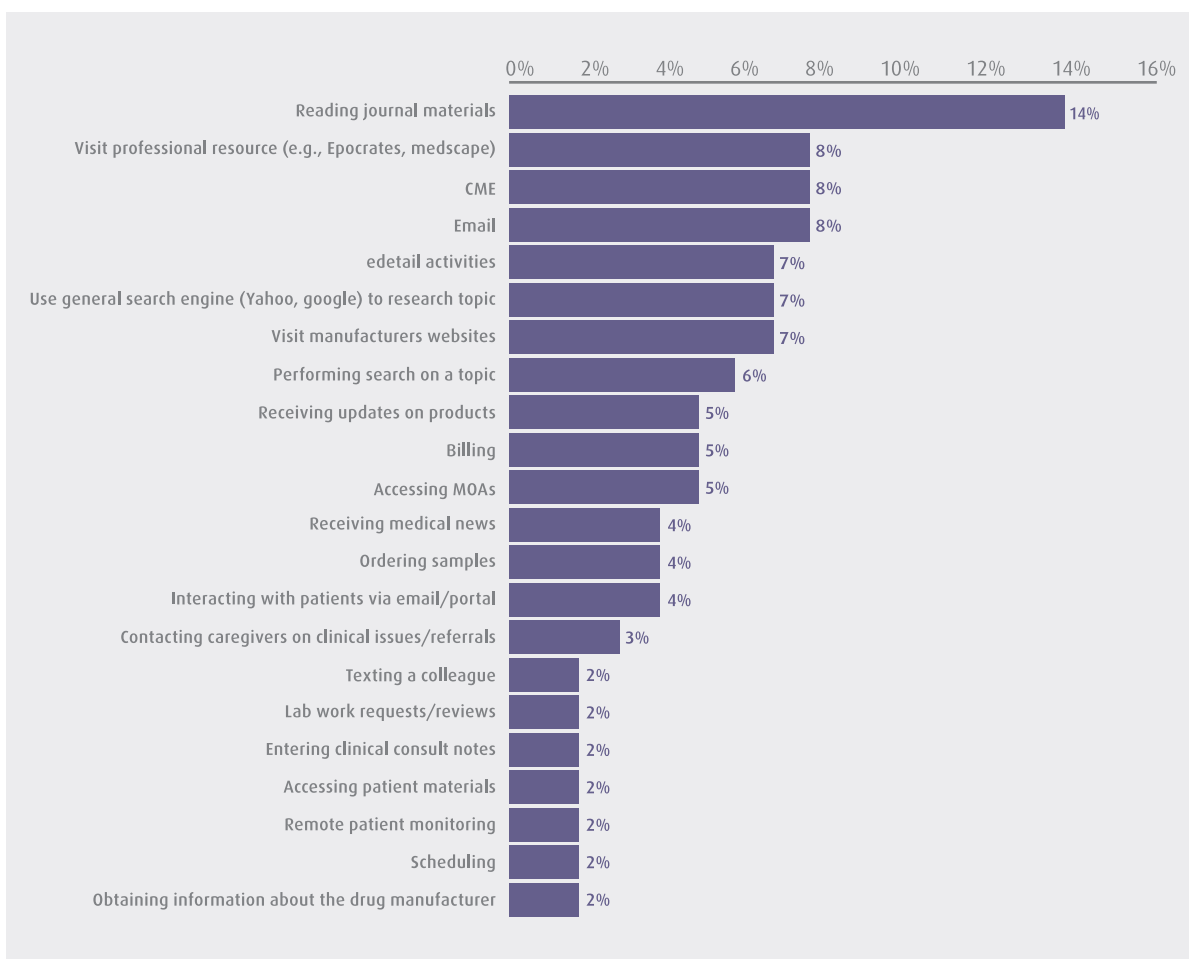
Epocrates Mobile Trends Survey 2013: Q2:

Which of the following mobile devices do you use now, or are you likely to use in a professional capability in the next 12 months?  
n: 204 PCP, 203 Cardiology, 202 Oncology, 201 Psychiatry, 128 PA, 125 NP

**Digital Omnivores are thriving, and driving change** *(continued)*

Digital omnivores, compared with general healthcare providers, use computers at about the same rate. However, they prefer mobile devices for all tasks, relying on them much more for communicating with colleagues, visiting professional resources, email and reading journal articles than their peers, who use just one or two digital platforms for their work.

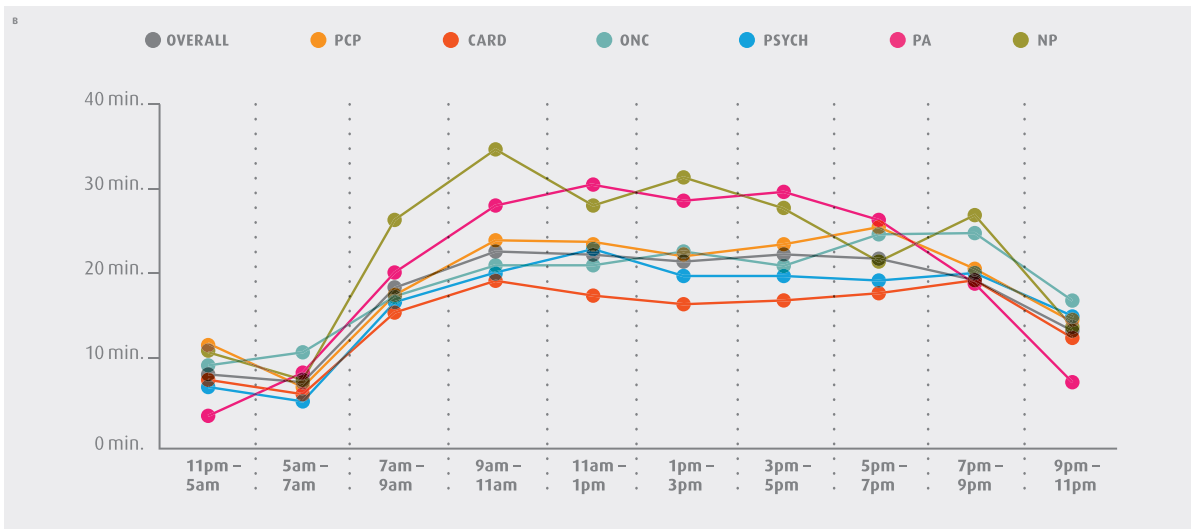
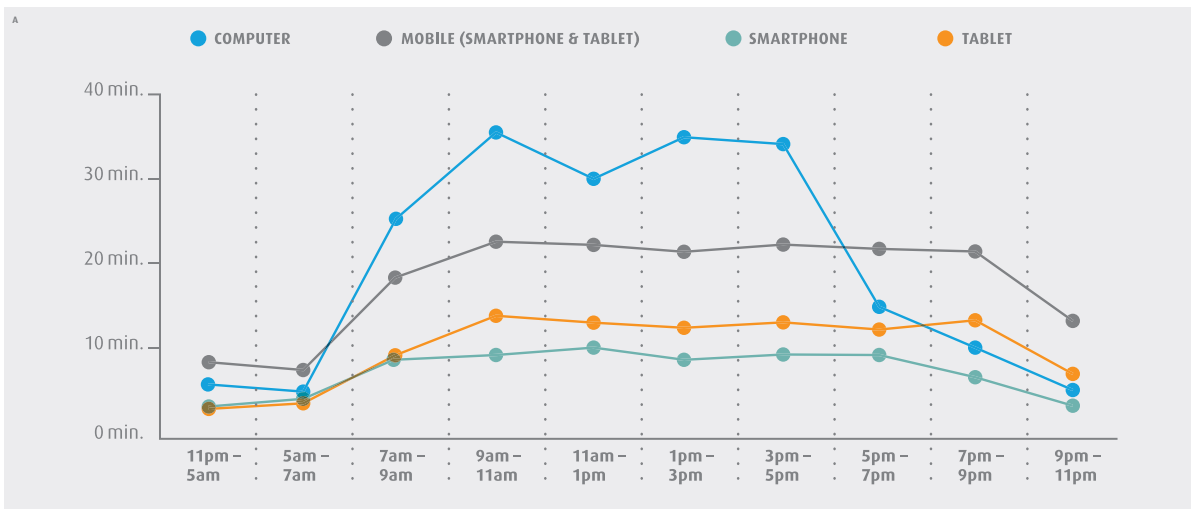
**DIGITAL OMNIVORE PREFERENCE FOR MOBILE VS. ALL HCPS**



## MOBILE DEVICES EXTEND THE DIGITAL DAY

Personal computers are used predominantly throughout the standard workday from 7am-5pm, but tablet and smartphone usage accounts for upwards of 40% of a typical clinician's digital time at work. Physician assistants and nurse practitioners express the biggest preference for using mobile devices during the day, with their usage peaking between 9 a.m. and 11 a.m. and again between 3 p.m. and 5 p.m.

The picture changes markedly outside of the office. Mobile devices remain powered on for professional reasons well into the evening, and time spent on tablets and smartphones accounts for the majority of time clinicians spend on digital devices from 5pm – 5am.



Epocrates Mobile Trends Survey 2013:

<sup>A</sup> Q6: Please estimate the number of minutes that you are actively using the following devices to download/process/search information (i.e. not traditional telephone capabilities) in a professional capacity during a typical working day. n=1063

<sup>B</sup> Q6: Please estimate the number of minutes that you are actively using the following devices to download/process/search information (i.e. not traditional telephone capabilities) in a professional capacity during a typical working day. n: 204 PCP, 203 Cardiology, 202 Oncology, 201 Psychiatry, 128 PA, 125 NP

## MOBILE HAS BECOME THE PRIMARY SCREEN

Mobile has become the primary screen for proactive information seeking and exchange across clinician segments. Smartphones and tablets are outstripping personal computers among clinicians when it comes to search traffic, accessing professional reference resources, and communication among colleagues. Administrative tasks and clinical note taking remain popular computer-based tasks with some traction gaining among tablet users.

Data suggest that the moments of greatest influence, however, are increasingly spent with a mobile device in hand: Seeking out clinical information and communicating with colleagues are the most common mobile tasks among all caregiver groups surveyed.

### TOP TASK-TO-SCREEN TRENDS

SEGMENT	TABLET	SMARTPHONE	COMPUTER
<b>OVERALL</b>	49% EHR/Notes/e-Prescribing	46% Search	71% EHR/Notes/e-Prescribing
<b>Computer users: 1063</b>	39% Search	38% Access a Professional Resource, e.g. Epocrates or Medscape	44% Search
<b>Smartphone users: 914</b>	24% Access a Professional Resource, e.g. Epocrates or Medscape	38% Communication with Colleagues	26% Communication with Colleagues
<b>Tablet users: 562</b>			
<b>CARDIOLOGY</b>	58% EHR/Notes/e-Prescribing	39% Search	79% EHR/Notes/e-Prescribing
<b>Computer users: 203</b>	30% Search	37% Communication with Colleagues	37% Search
<b>Smartphone users: 182</b>	20% Access a Professional Resource, e.g. Epocrates or Medscape	31% Access a Professional Resource, e.g. Epocrates or Medscape	24% Communication with Colleagues
<b>Tablet users: 119</b>			
<b>PRIMARY CARE</b>	52% EHR/Notes/e-Prescribing	49% Search	70% EHR/Notes/e-Prescribing
<b>Computer users: 204</b>	34% Search	40% Access a Professional Resource, e.g. Epocrates or Medscape	39% Search
<b>Smartphone users: 171</b>	30% Access a Professional Resource, e.g. Epocrates or Medscape	34% Communication with Colleagues	22% Access a Professional Resource, e.g. Epocrates or Medscape
<b>Tablet users: 115</b>			
<b>ONCOLOGY</b>	46% EHR/Notes/e-Prescribing	54% Communication with Colleagues	71% EHR/Notes/e-Prescribing
<b>Computer users: 202</b>	33% Search	42% Search	49% Search
<b>Smartphone users: 181</b>	32% Communication with Colleagues	31% Access a Professional Resource, e.g. Epocrates or Medscape	34% Communication with Colleagues
<b>Tablet users: 123</b>			
<b>PSYCHIATRY</b>	61% Search	51% Search	64% EHR/Notes/e-Prescribing
<b>Computer users: 201</b>	38% EHR/Notes/e-Prescribing	38% Access a Professional Resource, e.g. Epocrates or Medscape	50% Search
<b>Smartphone users: 168</b>	29% Communication with Colleagues	38% Communication with Colleagues	31% Communication with Colleagues
<b>Tablet users: 103</b>			
<b>NURSE PRACTITIONER</b>	50% EHR/Notes/e-Prescribing	50% Search	71% EHR/Notes/e-Prescribing
<b>Computer users: 125</b>	36% Search	50% Access a Professional Resource, e.g. Epocrates or Medscape	37% Search
<b>Smartphone users: 105</b>	29% Access a Professional Resource, e.g. Epocrates or Medscape	31% Communication with Colleagues	31% Access a Professional Resource, e.g. Epocrates or Medscape
<b>Tablet users: 56</b>			
<b>PHYSICIAN ASSISTANT</b>	48% EHR/Notes/e-Prescribing	50% Access a Professional Resource, e.g. Epocrates or Medscape	72% EHR/Notes/e-Prescribing
<b>Computer users: 128</b>	43% Search	49% Search	52% Search
<b>Smartphone users: 107</b>	28% Access a Professional Resource, e.g. Epocrates or Medscape	21% Communication with Colleagues	30% Access a Professional Resource, e.g. Epocrates or Medscape
<b>Tablet users: 46</b>			

Epocrates Mobile Trends Survey 2013

Q3: Please describe the professional tasks you most commonly conduct via your desktop/laptop computer. n=1063;

Q4: Please describe the professional tasks you most commonly conduct via your smartphone. n=914;

Q5: Please describe the professional tasks you most commonly conduct via your tablet. n=562



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## EHR IS LAGGING MOBILE ADOPTION

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Four in five physicians' practices have implemented electronic medical records and more than three in five that have not yet adopted an EHR plan to do so within the next year. Yet only one in three clinicians say their practice's EHR is optimized for mobile use. With EHR management already the top professional use of tablets among all clinician segments surveyed with the exception of psychiatry, and tablet adoption forecasted to spike by 60% in the next 12 months, market pressure for innovation in this area is mounting.

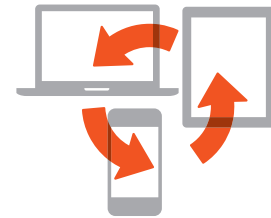
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## CONCLUSION

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Given the enormous changes in medicine stemming from the implementation of the Affordable Care Act, the demand for multi-screen information technology to assist healthcare providers has become even more critical.

Digital Omnivores are becoming the standard: connected, mobile-centric clinicians who show preference for mobile screens in all professional tasks and spend more time accessing digital information than their colleagues.



Physicians and other providers have an urgent need for tools and resources that can assist them in meeting more stringent and complex requirements around administrative tracking, economic trajectories of different therapies, and ultimately, patient outcomes. Clinicians clearly endorse the viability of mobile technology to enable rapid access to clinical information and communication among a growing roster of caregivers.

Industry stakeholders such as EHR providers, pharmaceutical companies, technology firms and content owners must now determine how best to leverage this groundswell of behavioral input to inform product development and marketing programs that support providers in successfully embracing these rapidly evolving models of healthcare.



### **About Epocrates, Inc.** *an athenahealth Company*

Healthcare is undergoing unprecedented change as providers adopt new care models, mobile technology and content delivery channels continue to rapidly evolve, and patients assume a more proactive stance than ever before. Effecting real innovation that facilitates the flow of information and supports stakeholders throughout the healthcare ecosystem is the driving mission of Epocrates, an athenahealth company.

Widely recognized for developing the #1 medical application among U.S. physicians, Epocrates specializes in delivering resources from across the healthcare ecosystem to support caregivers in making decisions with confidence and efficiency in the moments of care. Succinct, actionable clinical content and decision support tools created by an in-house team of medical experts and drawn from leading industry partners across the academic, pharmaceutical and biotechnology arenas are delivered to the more than 1 million healthcare professionals in the Epocrates member network.

In 2013, Epocrates was acquired by athenahealth, a leading provider of cloud-based services for electronic health record (EHR), practice management, and care coordination. athenahealth's mission is to be caregivers' most trusted service, helping them do well doing the right thing.

Together, Epocrates and athenahealth can fuel innovation with the insight derived from their respective caregiver networks, deepening engagement and improving end-to-end outcomes throughout the healthcare continuum.

For more information about Epocrates, please visit [www.epocrates.com/company](http://www.epocrates.com/company)

For more information about athenahealth, please visit [www.athenahealth.com](http://www.athenahealth.com)