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STUDY: PHYSICIAN SMARTPHONE ADOPTION EXPERIENCING EXPONENTIAL GROWTH

94 percent of physicians interviewed using smartphones to communicate, manage personal and business workflows, and access medical information

MENLO PARK, CA, July 23, 2010. Today, Spyglass Consulting Group released its most recent healthcare study, **Point of Care Communications for Physicians**. It shows significant trends on how physicians across the United States are adopting mobile communications at point of care to improve communications and collaboration, streamline productivity, and enhance patient care and safety.

Report reveals 94 percent of physicians are using smartphones to communicate, manage personal and business workflows, and access medical information. This represents a 60 percent increase from Spyglass' findings in a similar study published in November 2006 where 59 percent of physicians were using Smartphones. "Physician smartphone adoption is occurring more rapidly than with members of the general public," said Gregg Malkary, Managing Director of Spyglass Consulting Group. "Physicians are showing a clear preference for using the Apple iPhone (44 percent) over the RIM Blackberry (25 percent)."

HIGHLIGHTS OF THE POINT OF CARE COMMUNICATIONS FOR PHYSICIANS REPORT:

PHYSICIANS EXPERIENCING DIFFICULTIES CONNECTING WITH COLLEAGUES

Seventy-eight percent of physicians interviewed were experiencing difficulties accessing and communicating with colleagues in a timely manner. Physicians are busy mobile professionals who are constantly on the go and are not always available when they are needed. Many lack financial incentives to be more accessible because the current fee-for-service reimbursement system encourages physicians to focus on the quantity vs. the quality of healthcare delivered. Non-essential phone or e-mail communications with colleagues and patients are seen as non-reimbursable distractions.

PHYSICIANS OVERWHELMED BY THE VOLUME OF INCOMING COMMUNICATIONS

Physicians interviewed report they are overwhelmed by the daily volume of communications received from colleagues, care team members, and patients. They lack automated tools to manage voice mail, pager messages, SMS messages, and electronic mail. They are forced to continually check separate data silos and manually filter and prioritize communications based upon sender, subject and priority. Critical communications easily fall through the cracks.

PHYSICIANS LACK STANDARDIZED PROCESSES TO COORDINATE PATIENT CARE

Fifty-six percent of physicians interviewed were concerned about lack of standardized processes for transitioning care between colleagues. Patient hand off process used by hospital-based physicians and the patient referral process used by community-based physicians are informal and ad hoc which can introduce medical errors into the patient care process.

ABOUT SPYGLASS' POINT OF CARE COMMUNICATIONS FOR PHYSICIANS REPORT

Point of Care Communications for Physicians presents the findings of an end-user market study focused on how physicians across the United States are rapidly adopting mobile communications at point of care to improve communications and collaboration, streamline productivity, and enhance patient care and safety.

Point of Care Communications for Physicians is an outgrowth of a similar study published by Spyglass in November 2006 entitled **Trends in Mobile Communications**.

Content for **Point of Care Communications for Physicians** was derived from more than 100 in-depth interviews with physicians working in **acute care** and **ambulatory** environments nationwide. Physicians interviewed were technically competent and representative of a broad range of medical specialties, organization types, and organization sizes.

The telephone interviews were conducted over a three-month period starting in March 2010. The purpose of the interviews was to identify the needs and requirements for communications at point of care through discussions about:

- existing workflow inefficiencies in communicating with colleagues and patients,
- current usage models for mobile communications devices and solutions, and
- barriers for widespread mobile communications adoption.

Spyglass evaluated key vendor product offerings and identified early adopter organizations that have successfully deployed point of care solutions.

The **Point of Care Communications for Physicians** report is targeted at:

- **software and hardware vendors, systems integrators and management consulting groups** who are selling hardware, applications and services into the healthcare industry,
- **healthcare administrators and IT executives** who are making strategic decisions to fund clinical information technology solutions,
- **clinicians** who are involved in informatics and clinical system evaluation and selection, and
- **investment banking and private equity investors.**

The complete market study, "**Healthcare Without Bounds: Point of Care Communications for Physicians**," is available for $2,495 (USD) from Spyglass Consulting Group at www.spyglass-consulting.com.

ABOUT SPYGLASS CONSULTING GROUP

Spyglass Consulting Group is a market intelligence firm and consultancy focused on the nexus of information technology and healthcare. Spyglass offers products and services in customer and market intelligence, strategic partnership development, product marketing and investment due diligence. Spyglass' current research is entitled **Healthcare without Bounds** that focuses on the current and future potential of mobile computing and wireless technologies within the healthcare industry.

Spyglass customers include more than 140 leading high technology vendors, management consulting organizations and healthcare providers including **Cisco, IBM, Microsoft, Intel, Hewlett Packard, Oracle, Johnson & Johnson, Pfizer, Siemens, GE Healthcare, Philips Medical, Sprint,** and **Kaiser Permanente.**

Gregg Malkary is the **founder** and **Managing Director** of **Spyglass Consulting Group**. He has more than 20 years experience in the high technology industry working with Fortune 2000 companies to help them use information technology for competitive advantage. Malkary has domain expertise in mobile computing, wireless and broadband technologies with direct experience in the healthcare, hospitality, manufacturing, communications and entertainment markets.

Prior to founding **Spyglass Consulting Group** in August 2002, Malkary was an Associate Partner at **Outlook Ventures**, a venture capital firm focused on early stage investments in enterprise software and communications companies. Previously, Malkary was the Director of Strategic Planning for **Exodus Communications** where he was responsible for identifying, evaluating and executing growth initiatives for Exodus in the managed Web-hosting marketplace. Malkary has also held consulting and senior management roles in business development, strategic planning and product marketing for public and private technology companies including **IBM, Hewlett Packard, Accenture, Silicon Graphics** and **Skytel Communications.**

Malkary frequently speaks at regional and national conferences focused on mobile computing, wireless technologies and healthcare related issues. Numerous industry publications have written about and quoted Malkary including the *Wall Street Journal*, *CIO*, *Business 2.0*, *MIT Technology Review*, *Network World* and *eWeek*.

Malkary is an honors graduate of **Brown University** having earned a MS and BA in Computer Science. He was awarded the prestigious North American Philips Corporation Fellowship for his graduate research work in graphical simulation environments.

For additional information about this study, please contact Gregg Malkary at gmalkary@spyglass-consulting.com. © 2010, Spyglass Consulting Group. All rights reserved.

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