



QRCA Healthcare Special Interest Group

The Effect of COVID-19 on Physician Willingness to Participate in Qualitative Research

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Background and Research Objective

The purpose of this research was to examine the impact of Covid-19 pandemic on market research among US physicians.

Research Objectives:

- ✓ Quantify **past research participation** by method: quant, qual, in person, online qual etc.
- ✓ Assess current **availability** compared to 3 months ago (more/less/same)
- ✓ Determine current level of **interest** in participating in various research methods
- ✓ Evaluate current **use of online platforms** for personal and business
- ✓ **Willingness to participate** in future qualitative research activities (interview, webcam interview, bulletin board, online focus group etc.)
- ✓ Level of **interest in qual research platform tutorials/training**

Methodology



Online Survey

5 minutes in duration

Honoraria: Nominal Incentive was offered by Survey Healthcare Globus



Fielding

April 9 – 21, 2020

Survey programming, hosting and recruitment was performed in gratis by Survey Healthcare Globus



Respondents

US ONLY

In practice 2 – 30 years

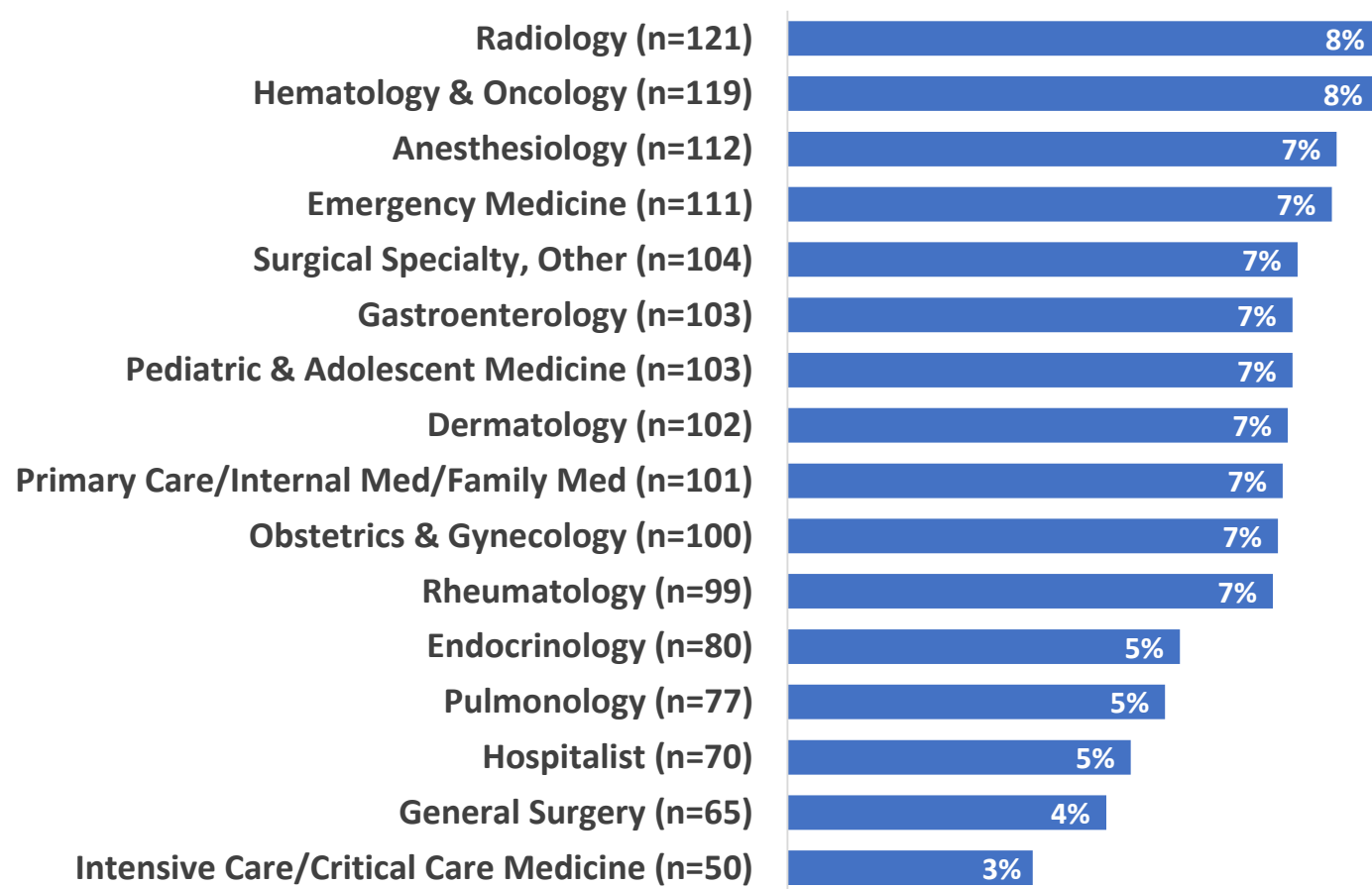
Spends 70%+ time in direct patient care

Must have participated in quantitative *or* qualitative market research in 2019 *or* 2020

Respondent Characteristics

*Let's look at the respondent breakdown
by specialty, region and years in practice*

We had good representation for the various specialties and geographically. We were hoping to recruit about 100 each.



| US Region | |
|-----------|-----|
| Northeast | 376 |
| Midwest | 370 |
| South | 481 |
| West | 280 |

S2 Which of the following best describes your medical specialty? (Base: Qualified respondents n=1,507)

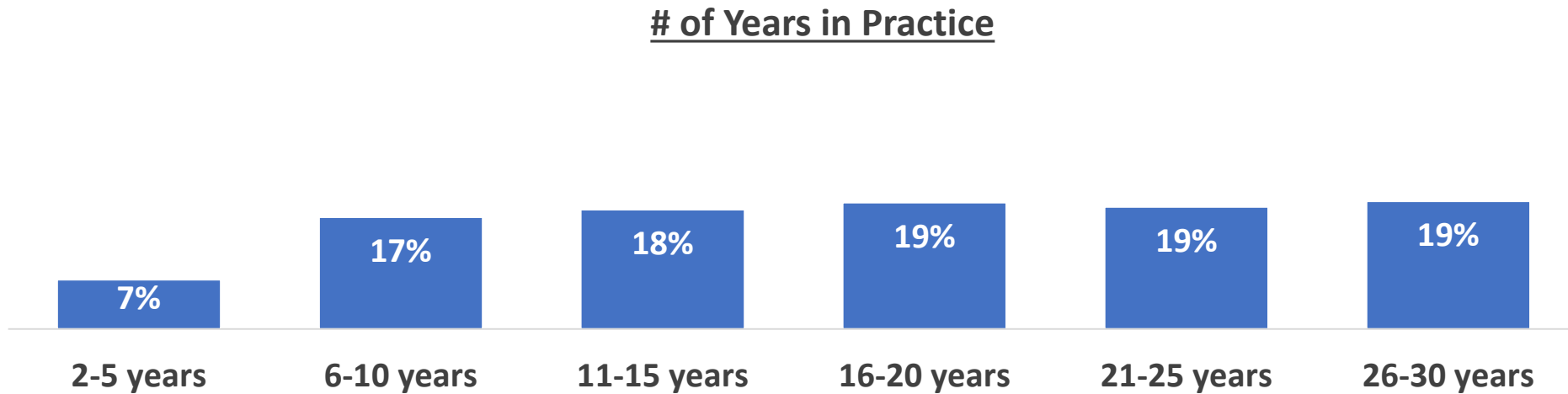
To help gain insights into the potential impact of COVID, we assigned specialties into one of four groups

We assigned specialties into one of 4 Groups



S2 Which of the following best describes your medical specialty? (Base: Qualified respondents n=1,507)

Early career respondents were underrepresented relative to those with 6 or more years of experience



S4 How many years have you been in practice beyond your residency and fellowship? (Base: Qualified respondents n=1,507)

What type of research do respondents participate in and has it changed?

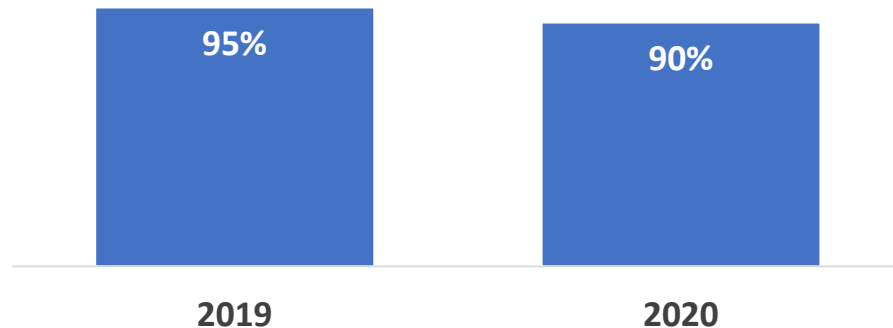
Participation in qualitative research activities was about half that of quantitative studies

Quantitative Research



Includes online or paper surveys

% Yes



Qualitative Research



Includes activities such as one-on-one in-person interviews or focus groups, telephone interviews, online web-based interviews or focus groups, online bulletin "discussion" boards and in-person or online ethnographic research.

% Yes



*S8 Have you participated in quantitative or qualitative market research studies in 2019 and thus far in 2020?
(Base: Qualified respondents n=1,507)*

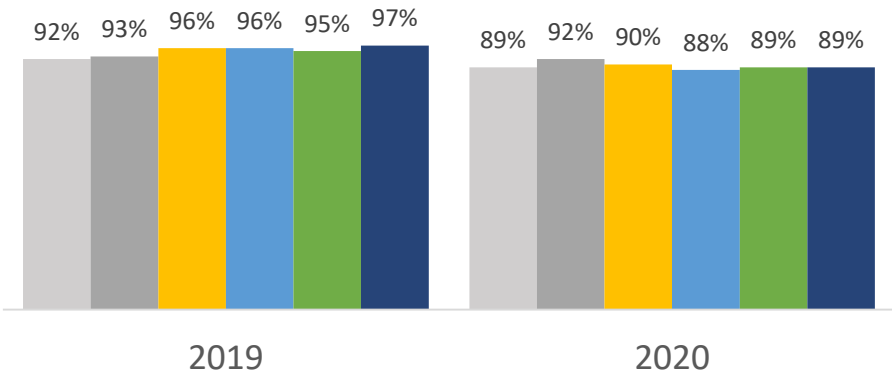
Early career physicians were less likely to participate in qualitative research

Quantitative Research



Includes online or paper surveys
% Yes

■ 2-5 ■ 6-10 ■ 11-15 ■ 16-20 ■ 21-25 ■ 26-30

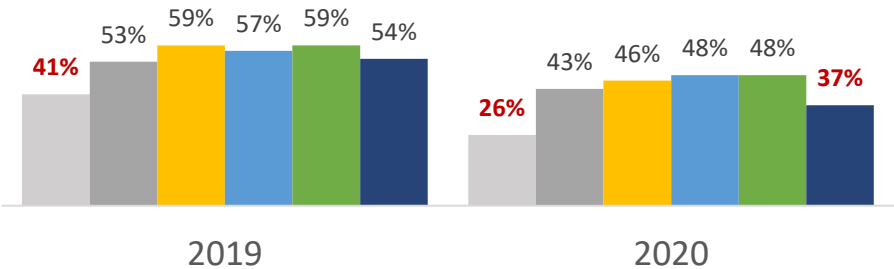


Qualitative Research



Includes activities such as one-on-one in-person interviews or focus groups, telephone interviews, online web-based interviews or focus groups, online bulletin "discussion" boards and in-person or online ethnographic research.
% Yes

■ 2-5 ■ 6-10 ■ 11-15 ■ 16-20 ■ 21-25 ■ 26-30



S8 Have you participated in quantitative or qualitative market research studies in 2019 and thus far in 2020?
(Base: Qualified respondents n=1,507)

Research participation thus far in 2020 lags 2019 rates across all groups, with slightly larger gaps in qualitative studies



| % Yes | Primary Care/ Pediatrics (n=191) | Emergency/Acute/ Critical Care (n=177) | Surgeon/Surgical Subspecialty (n=148) | Medical Subspecialty (n=159) |
|------------------------------|--|--|---|------------------------------------|
| Quantitative Research | | | | |
| 2019 | 97% | 94% | 95% | 95% |
| 2020 | 89% | 87% | 87% | 93% |
| Change | -8 ↓ | -7 ↓ | -8 ↓ | -2 |
| Qualitative Research | | | | |
| 2019 | 50% | 47% | 52% | 64% |
| 2020 | 39% ↓ | 34% ↓ | 40% ↓ | 52% |
| Change | -11 | -13 | -12 | -12 |

S8 Have you participated in quantitative or qualitative market research studies in 2019 and thus far in 2020?
(Base: Qualified respondents n=1,507)



Statistically significant difference between groups



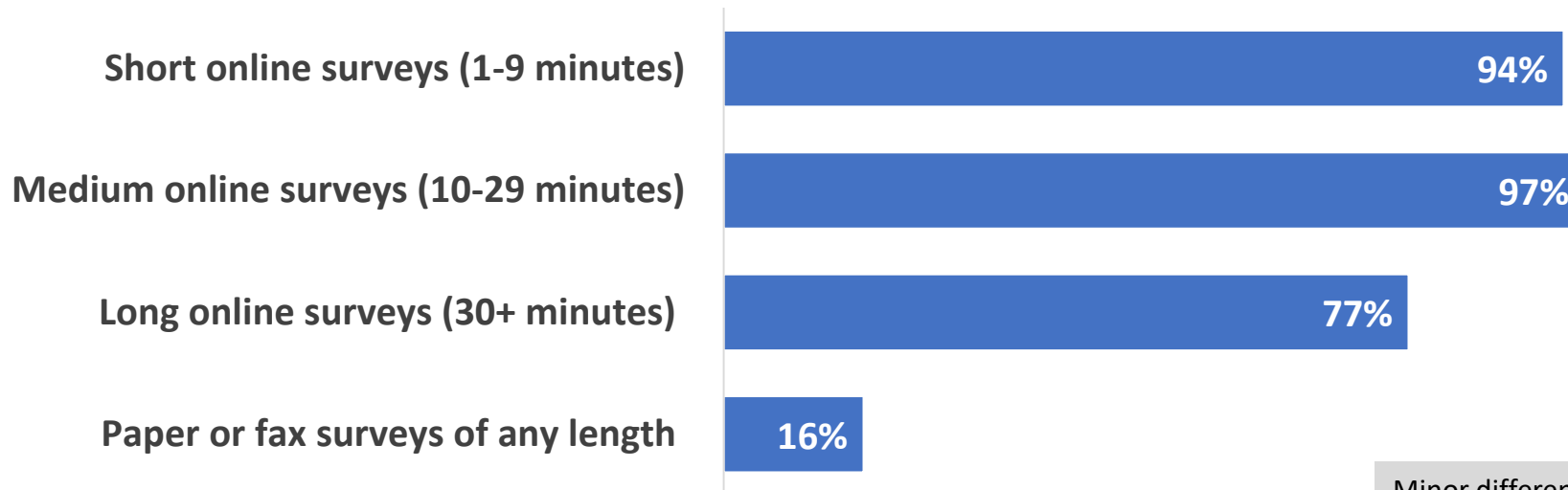
Statistically significant difference between years



Research participation in longer surveys lags shorter ones, but may be due to less invites to longer surveys overall

Quantitative Research

Among those participating in Quantitative Research



Q1. Which of the following types of quantitative (survey) market research did you participate in during 2019?
(Base: Qualified respondents participating in Quantitative Research in 2019: n=1,434)

Minor differences by Grouped Medical Specialty:

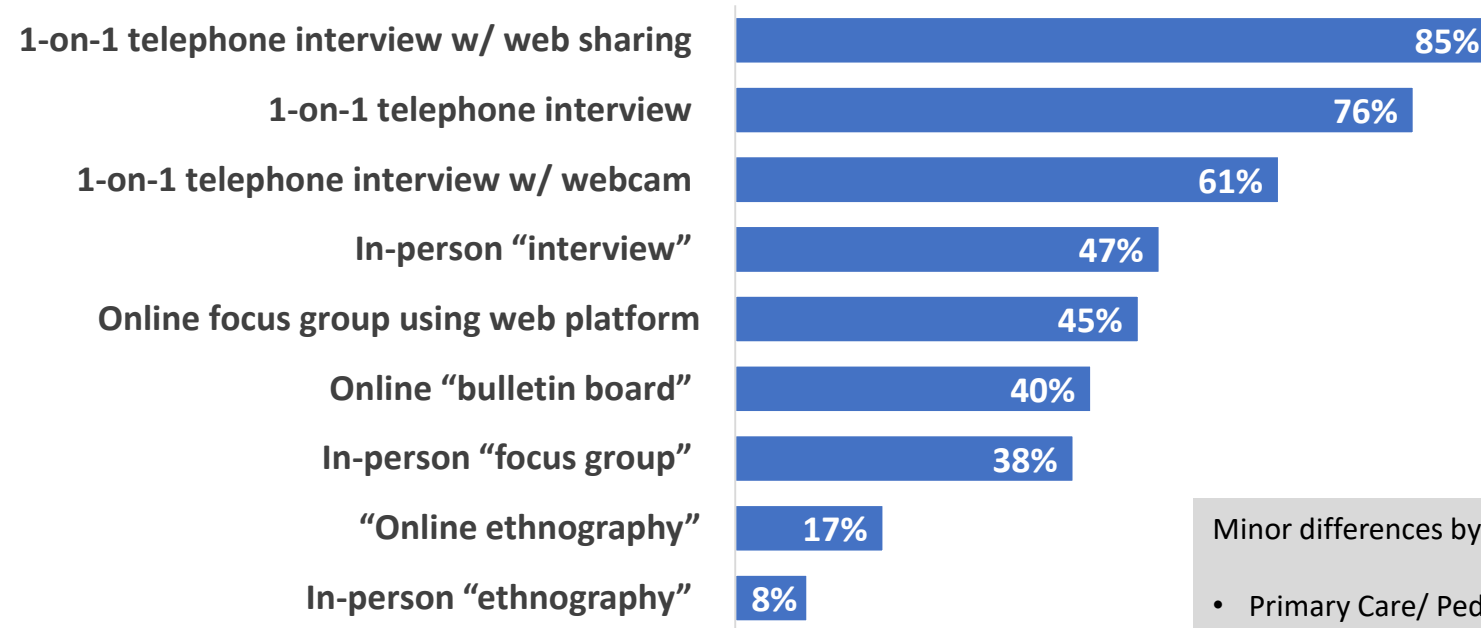
- Emergency/Acute/ Critical Care: *less* likely to participate in long online surveys (**69%**)
- Medical Subspecialty : *more* likely to participate in long online surveys (**84%**)

Rates of research participation varied greatly by the type of qualitative research



Qualitative Research

Among those participating in Qualitative Research



Q2. Which of the following types of qualitative (interview/discussion) market research did you participate in 2019?
(Base: Qualified respondents participating in Qualitative Research in 2019 n=833)

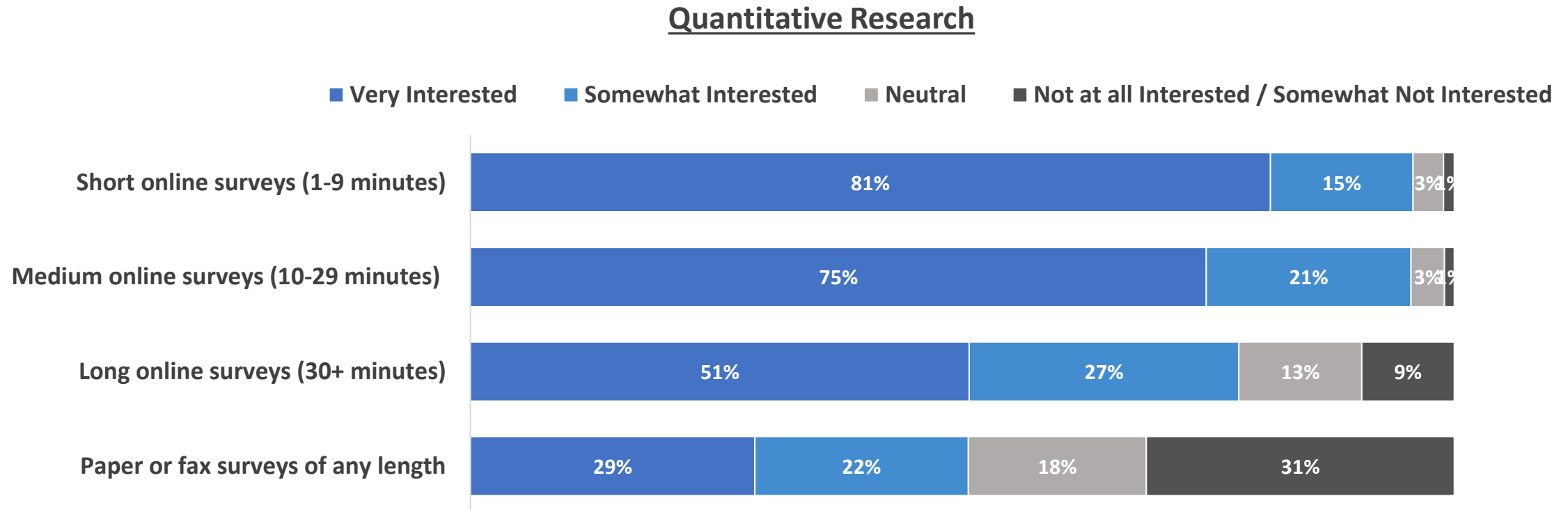
Minor differences by Grouped Medical Specialty:

- Primary Care/ Pediatrics: *less* likely to participate in focus groups (**33%**)
- Medical Subspecialty *more* likely to participate in most types of Qualitative research listed.

What is your level of interest in participating on market research?



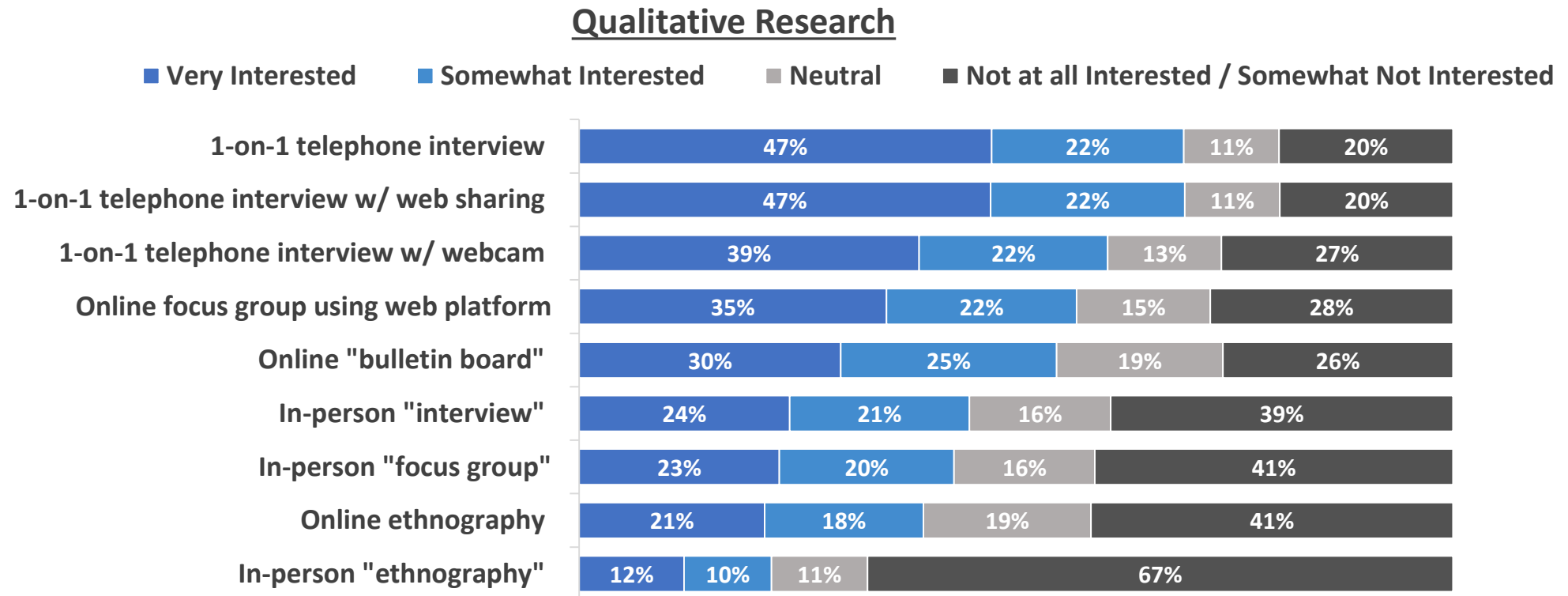
Interest in participating in online quantitative research is strong, even for longer surveys



Q7. Thinking about your interest in participating in quantitative (survey) market research in the next three months, please rate your level on interest in participation in the various forms of market research.
(Base: Qualified respondents n=1,507)



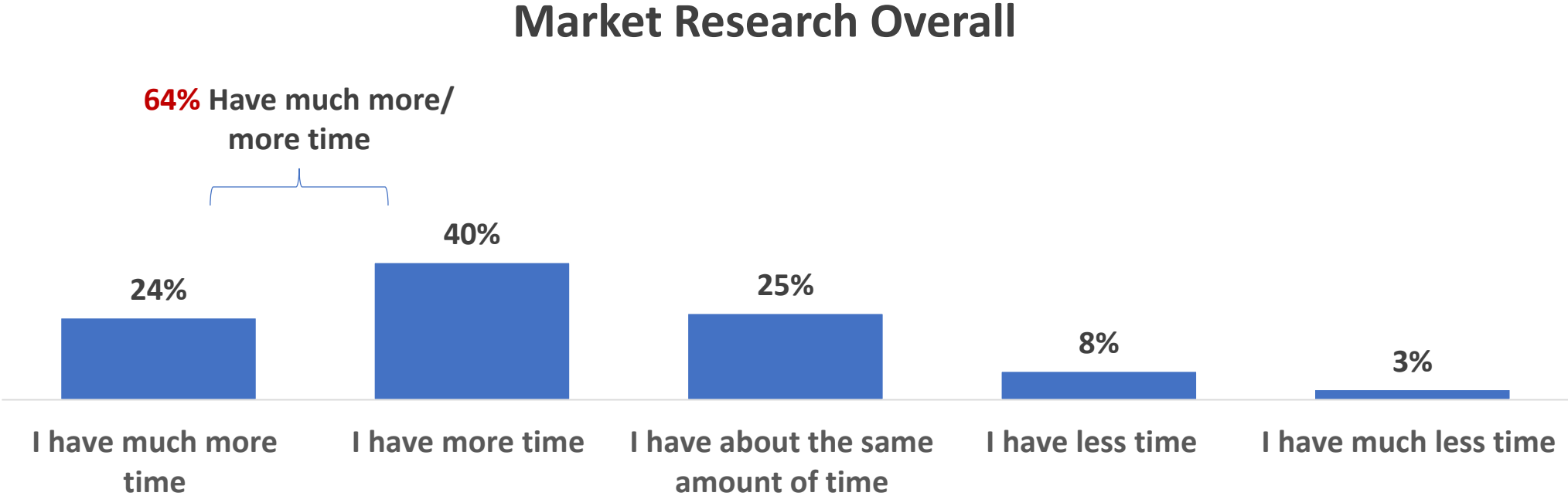
The highest interest in qualitative research is for online and one on one studies, versus groups and in-person research



Q8. Thinking about your interest in participating in qualitative (interview/discussion) market research in the next three months, please rate your level on interest in participation in the various forms of market research
(Base: Qualified respondents n=1,507)

To what degree has the coronavirus pandemic impacted your availability and interest for participating in market research?

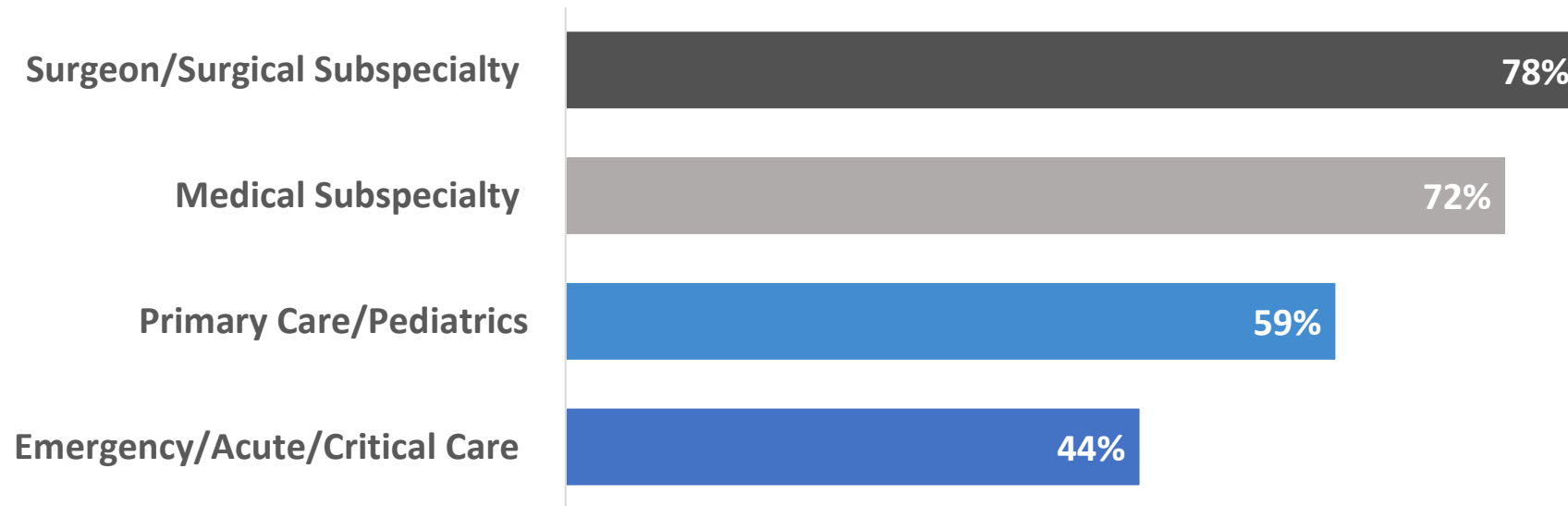
Nearly two thirds have more time for participation in market research as a result of the pandemic



*Q10. To what degree has the coronavirus pandemic impacted your availability for participation in market research.
(Base: Qualified respondents n=1,507)*

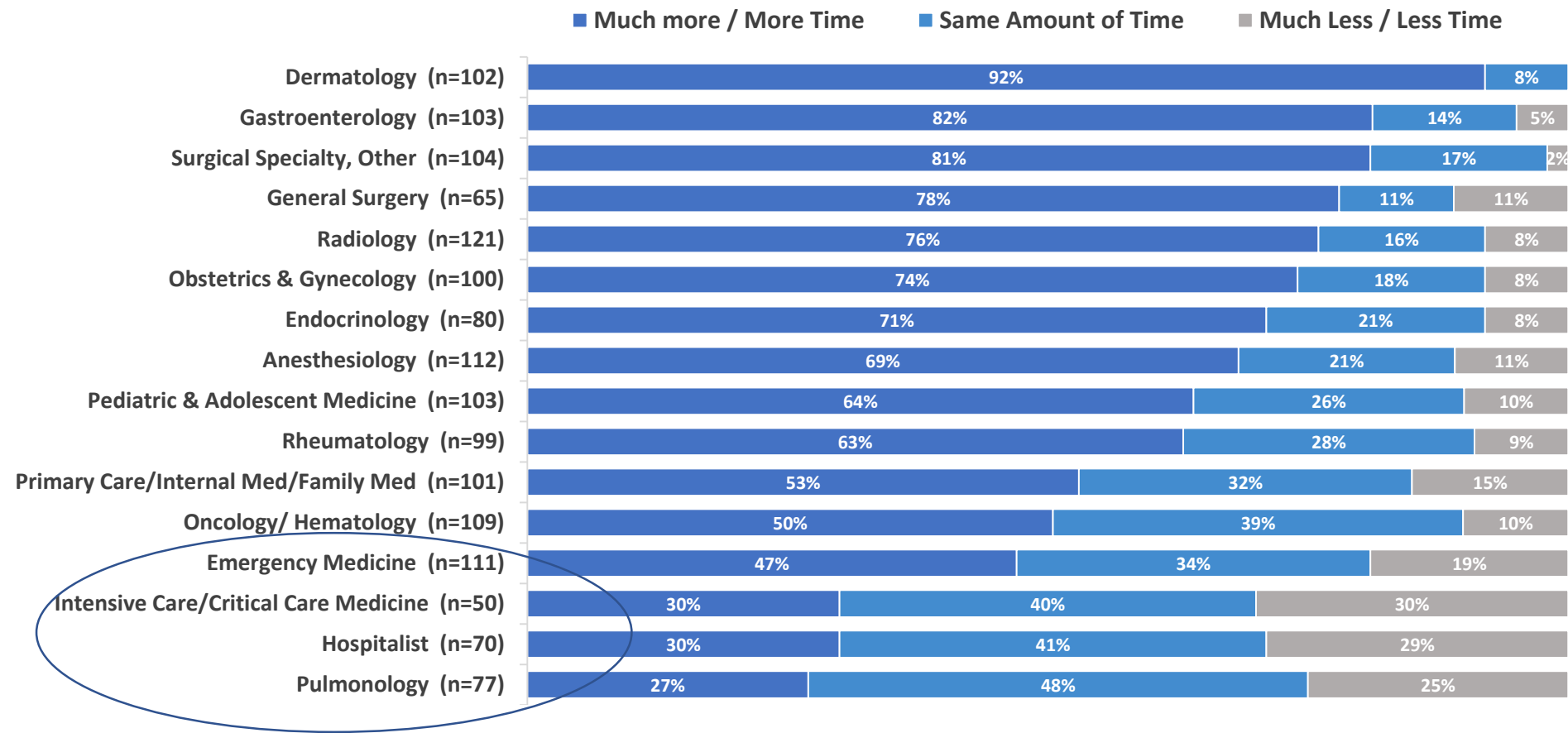
The Surgeon / Surgical Subspecialty group is most likely to report having more time for market research participation

% Much More Time / More Time - By Specialty Group



*Q10. To what degree has the coronavirus pandemic impacted your availability for participation in market research.
(Base: Qualified respondents n=1,507)*

Increase in availability for market research participation varies greatly by specialty, with the least increase among “EM/acute care” providers

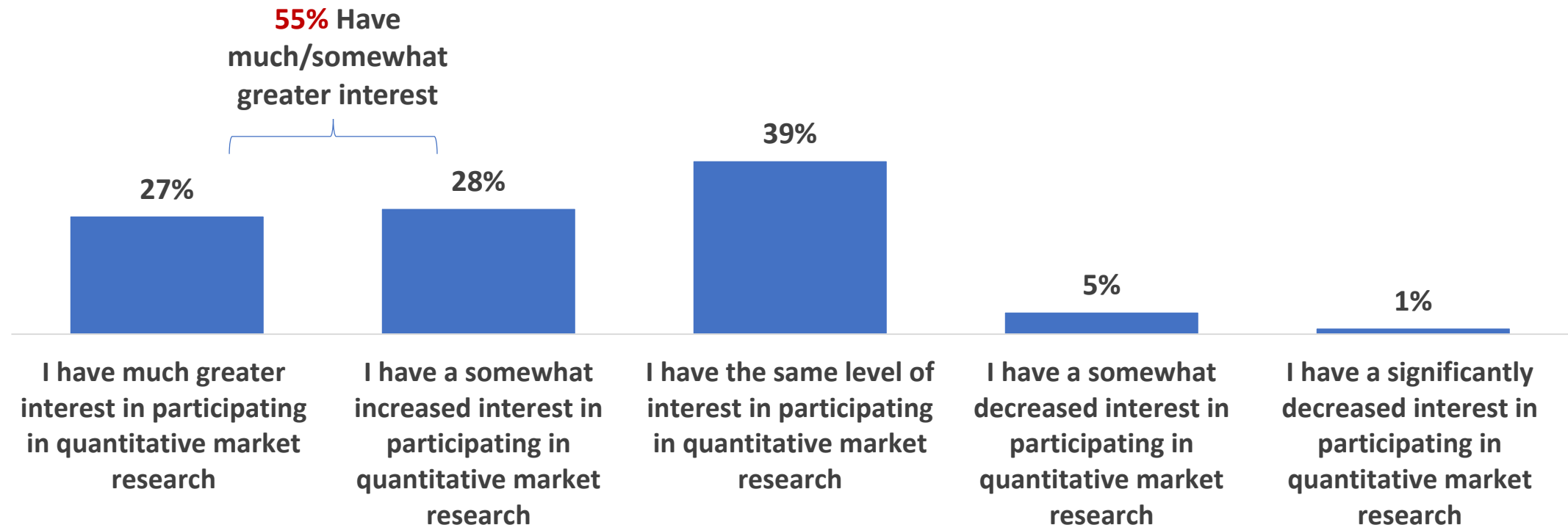


Q10. To what degree has the coronavirus pandemic impacted your availability for participation in market research.
(Base: Qualified respondents n=1,507)



The pandemic has increased interest in quantitative research participation for over half of respondents

Quantitative Market Research



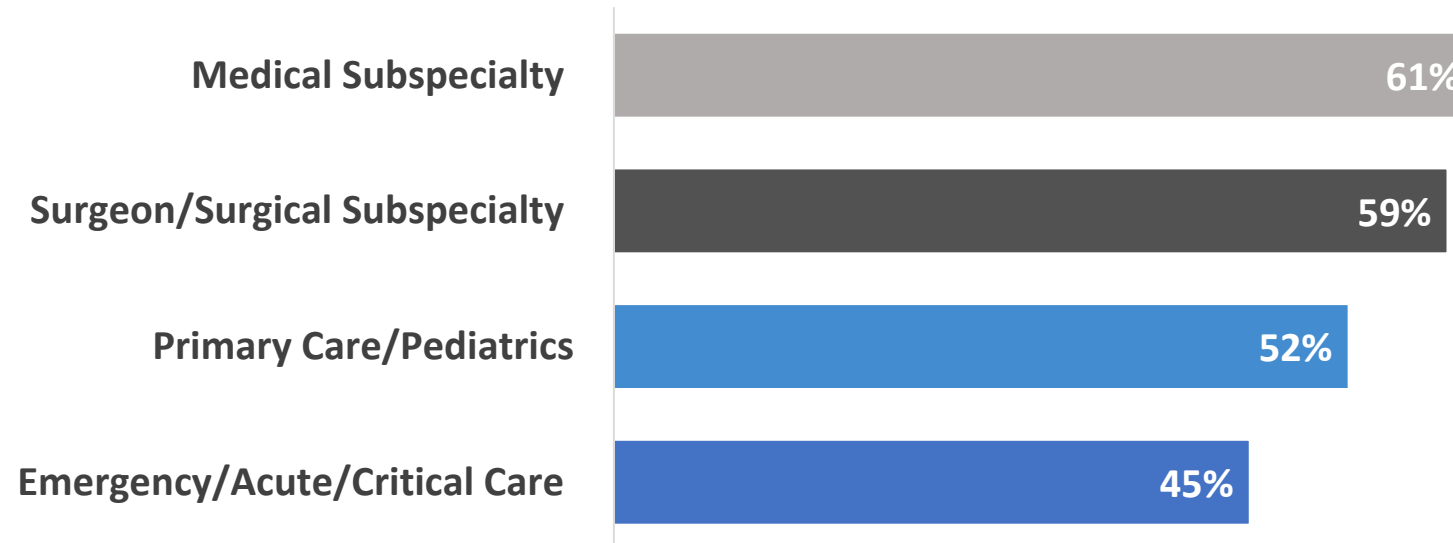
Q11. To what degree has the coronavirus pandemic impacted your interest in participating in quantitative market research?
(Base: Qualified respondents n=1,507)

The Medical & Surgical Subspecialty groups are more likely to be interested in participating in quantitative market research



Quantitative Market Research

% Much Greater / Somewhat Increased Interest by Specialty Group

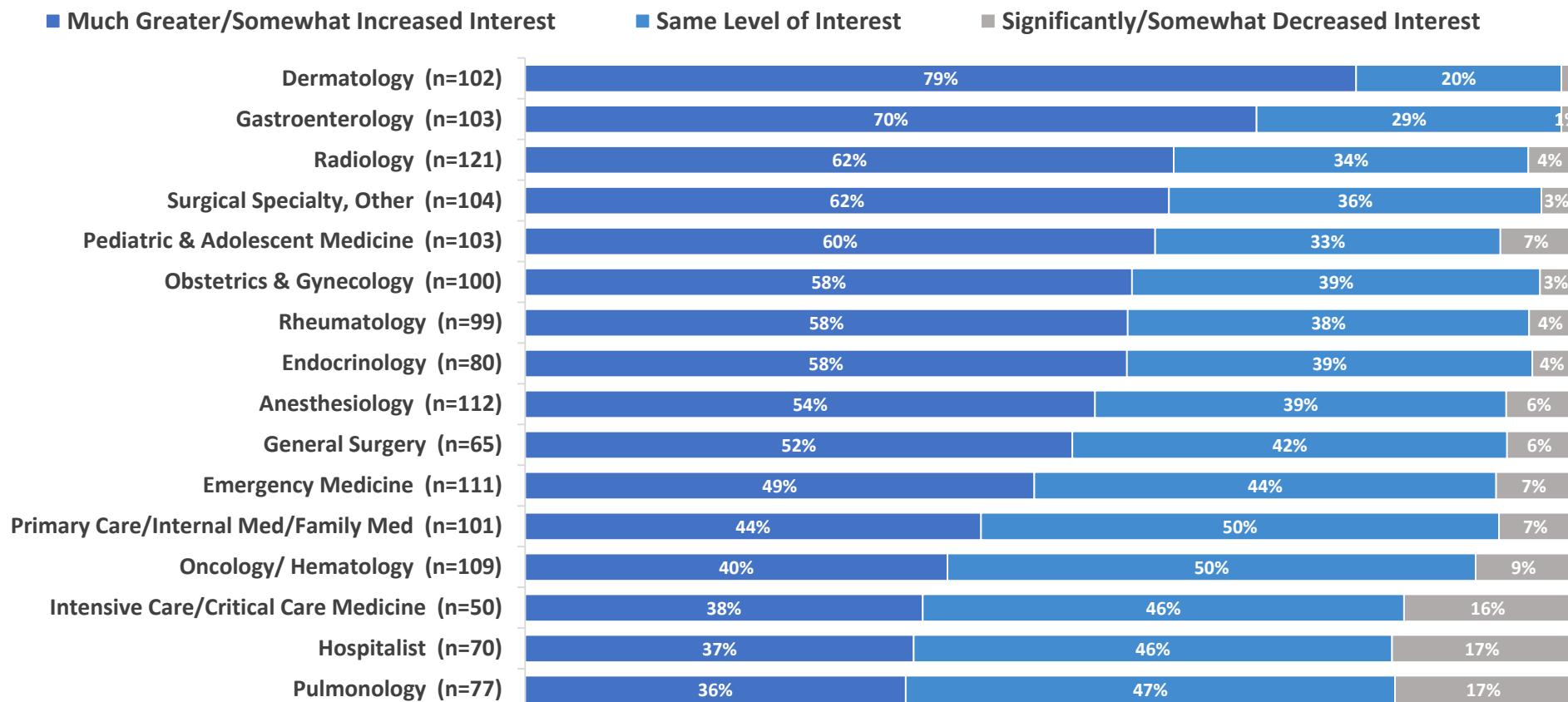


Q11. To what degree has the coronavirus pandemic impacted your interest in participating in quantitative market research?
(Base: Qualified respondents n=1,507)

Increased interest in quantitative research participation is lowest among acute care providers



Quantitative Market Research

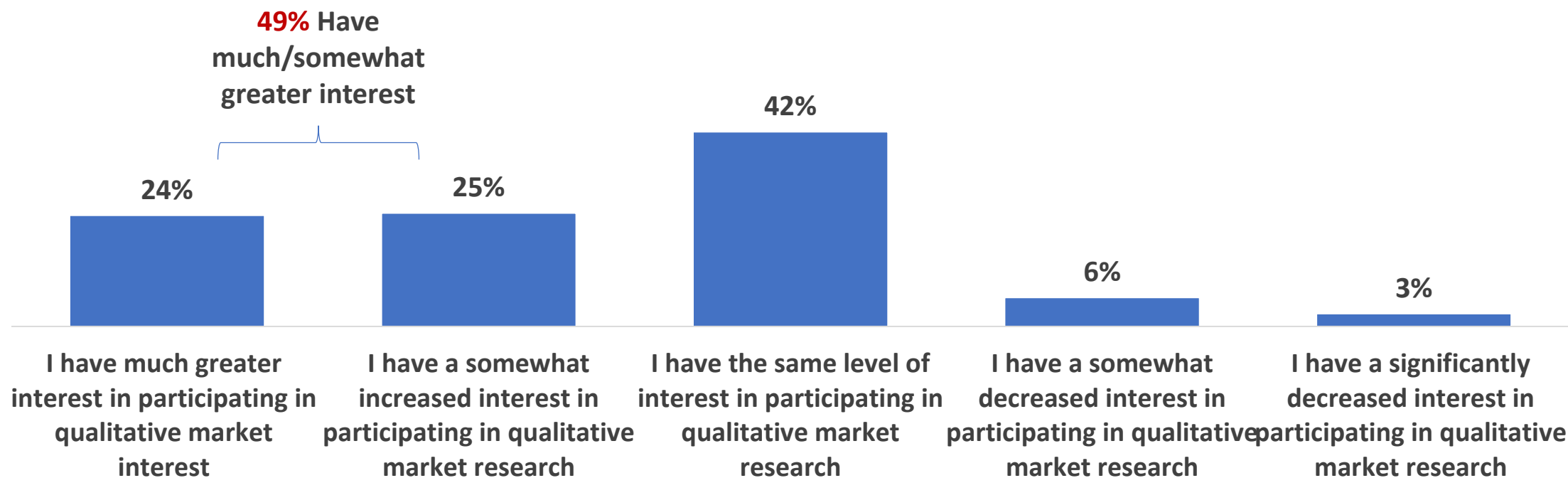


Q11. To what degree has the coronavirus pandemic impacted your interest in participating in quantitative market research?
(Base: Qualified respondents n=1,507)

Half report increased interest in qualitative research participation as a result of the pandemic; fewer than 10% have less interest



Qualitative Market Research



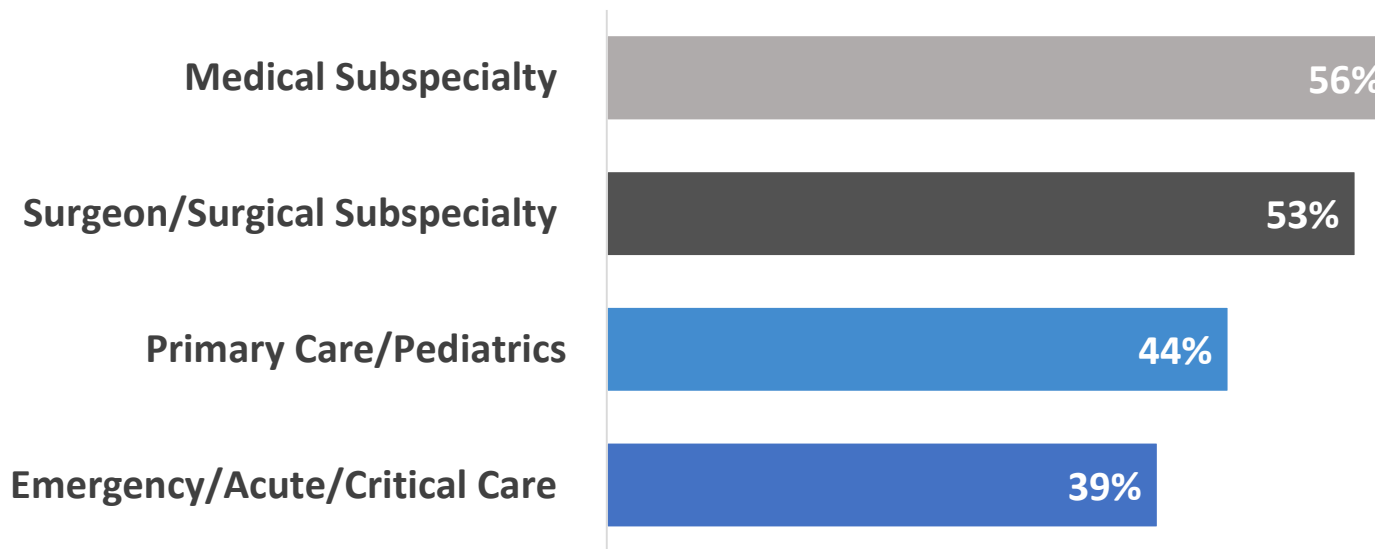
Q12. To what degree has the coronavirus pandemic impacted your interest in participating in qualitative market research?
(Base: Qualified respondents n=1,507)

The degree of increased interest varies some between the four specialty groups



Qualitative Market Research

% Much Greater / Somewhat Increased Interest by Specialty Group

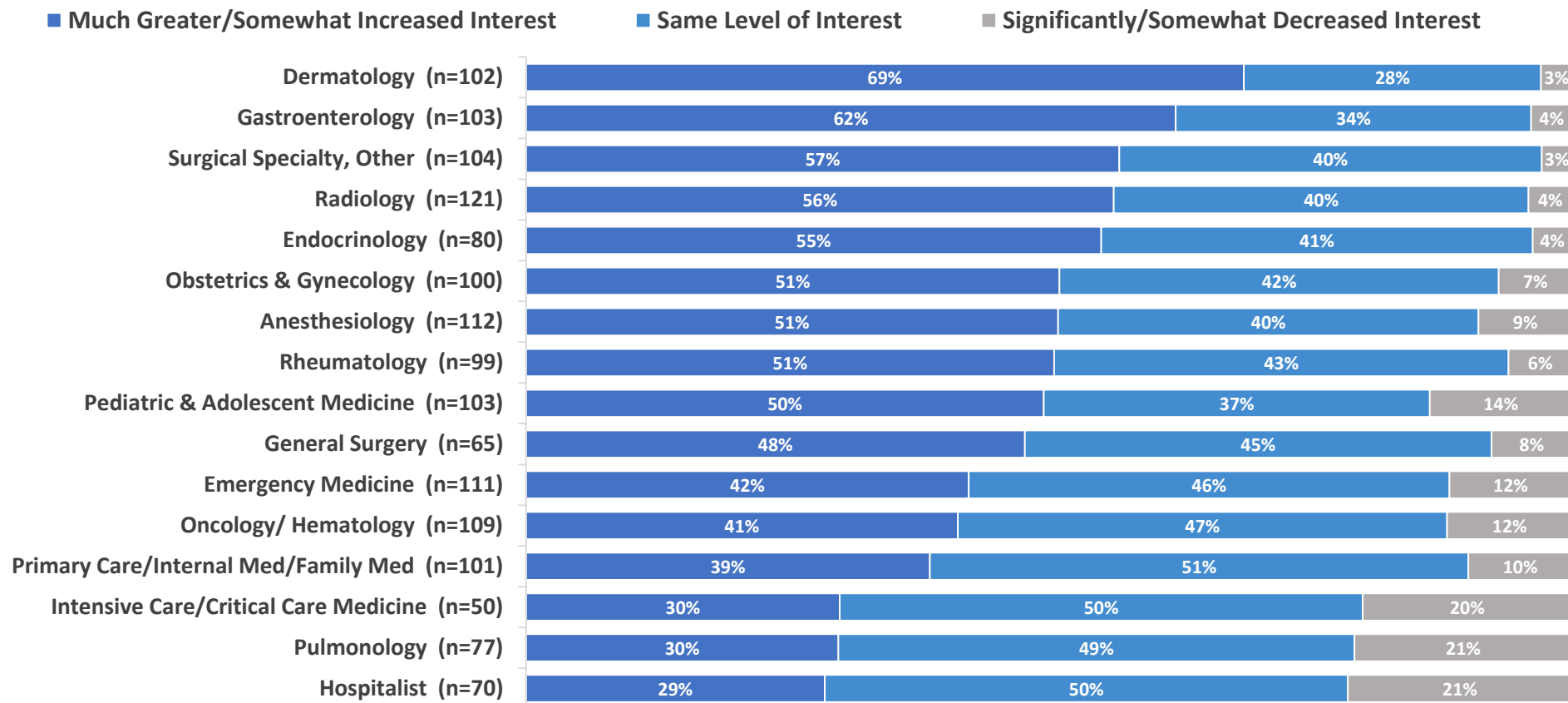


Q12. To what degree has the coronavirus pandemic impacted your interest in participating in qualitative market research?
(Base: Qualified respondents n=1,507)

Interest in qual research participation is less among acute care providers compared to colleagues in other specialties



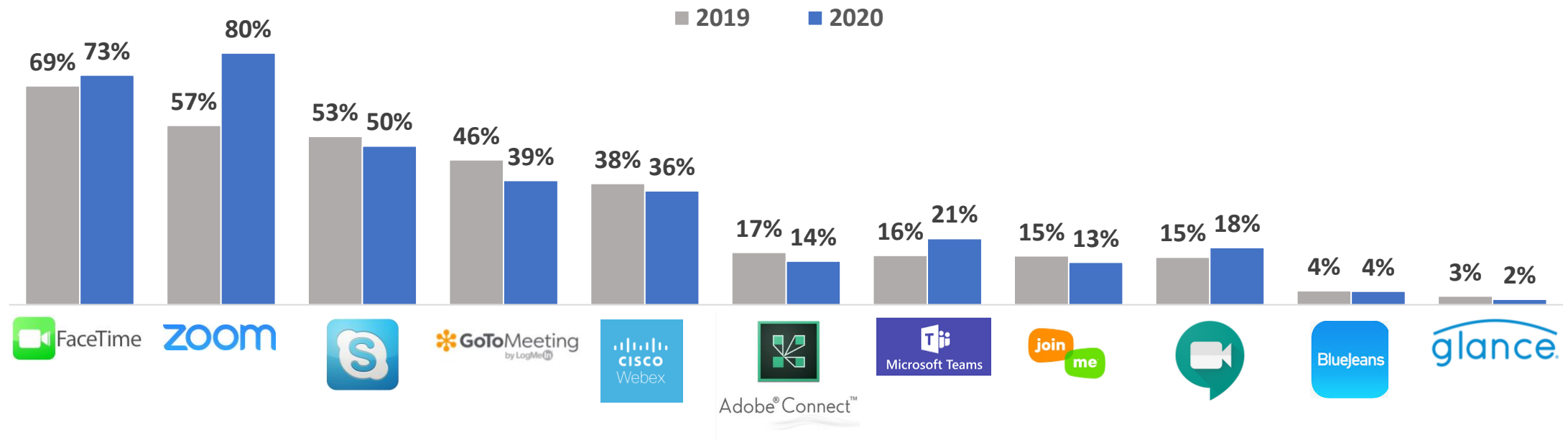
Qualitative Market Research



Q12. To what degree has the coronavirus pandemic impacted your interest in participating in qualitative market research?
(Base: Qualified respondents n=1,507)

What type of web-based and virtual platforms are respondents using and has it changed?

Online platforms are also used for personal and professional non-research activities



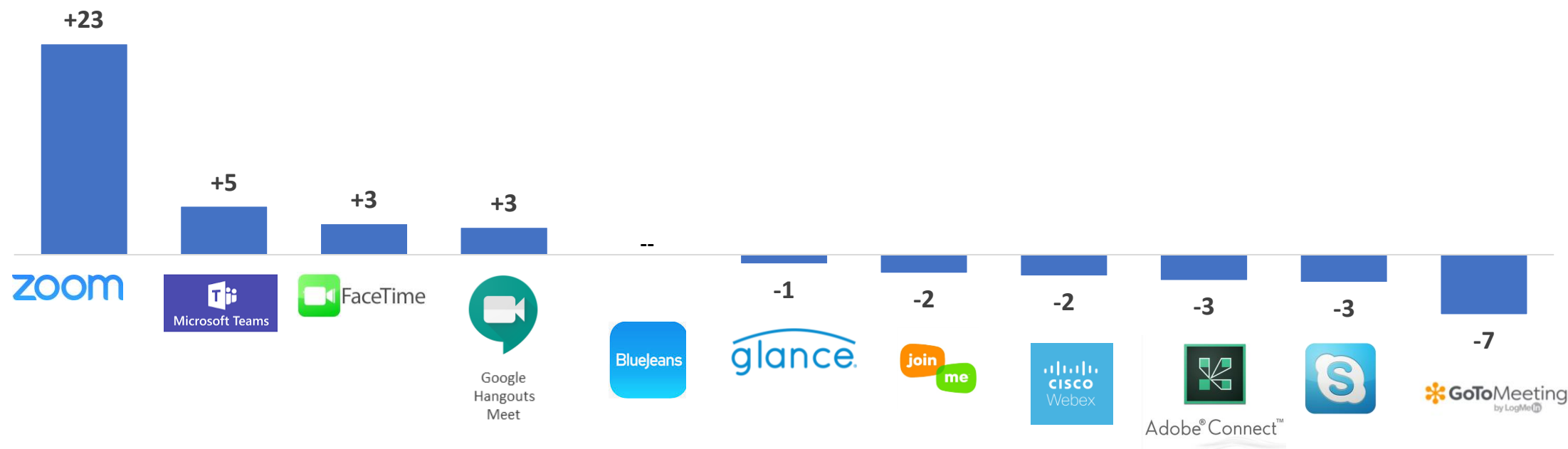
Q4 Which of the following online interview platforms did you use for reasons other than market research in 2019; for example, in your personal or professional life?

Q6 Which of the following online interview platforms did you use for reasons other than market research in 2020; for example, in your personal or professional life?

(Base: Qualified Respondents n=1,507)

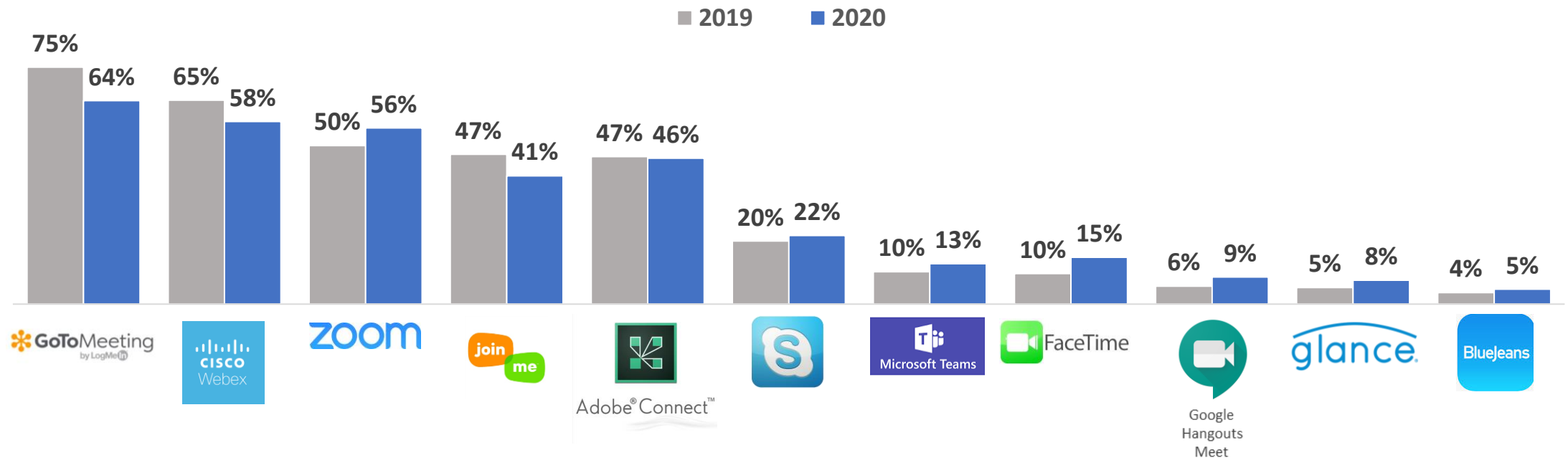
Zoom and Microsoft Teams had the largest growth in use between 2019 and 2020 for non-research activities

Point Change 2020 vs. 2019



Q4 Which of the following online interview platforms did you use for reasons other than market research in 2019; for example, in your personal or professional life?
Q6 Which of the following online interview platforms did you use for reasons other than market research in 2020; for example, in your personal or professional life?
(Base: Qualified Respondents n=1,507)

A number of online platforms are used for qualitative market research



Q3 Which of the following online interview platforms did you use for market research purposes in 2019? Do not include for personal or professional use outside of market research?

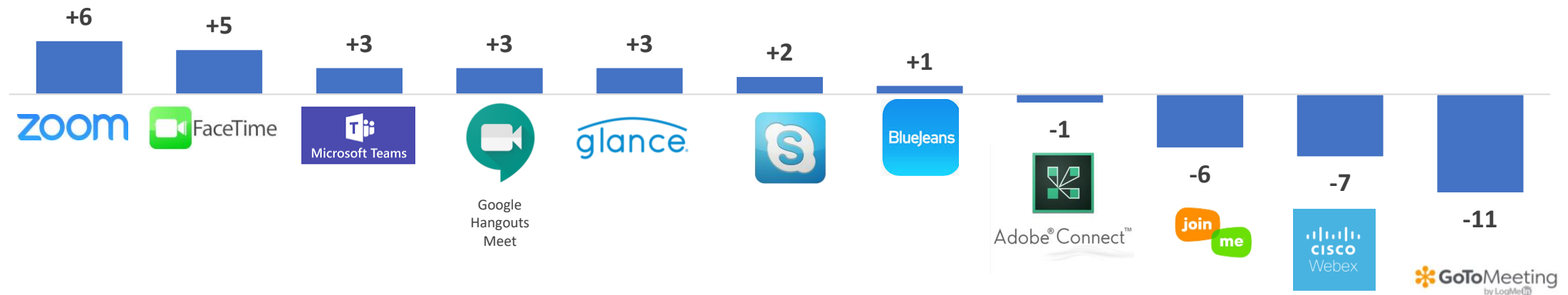
(Base: Participating in Qualitative Research in 2019 n=833)

Q5 Which of the following online platforms did you use for market research purposes in 2020? Do not include use for personal or professional use outside market research?

(Base: Participating in Qualitative Research in 2020 n=649)

There also appears to be a shift in which online platforms are being utilized for market research between 2019 to 2020

Point Change 2020 vs. 2019



Q3 Which of the following online interview platforms did you use for market research purposes in 2019? Do not include for personal or professional use outside of market research?

(Base: Participating in Qualitative Research in 2019 n=833)

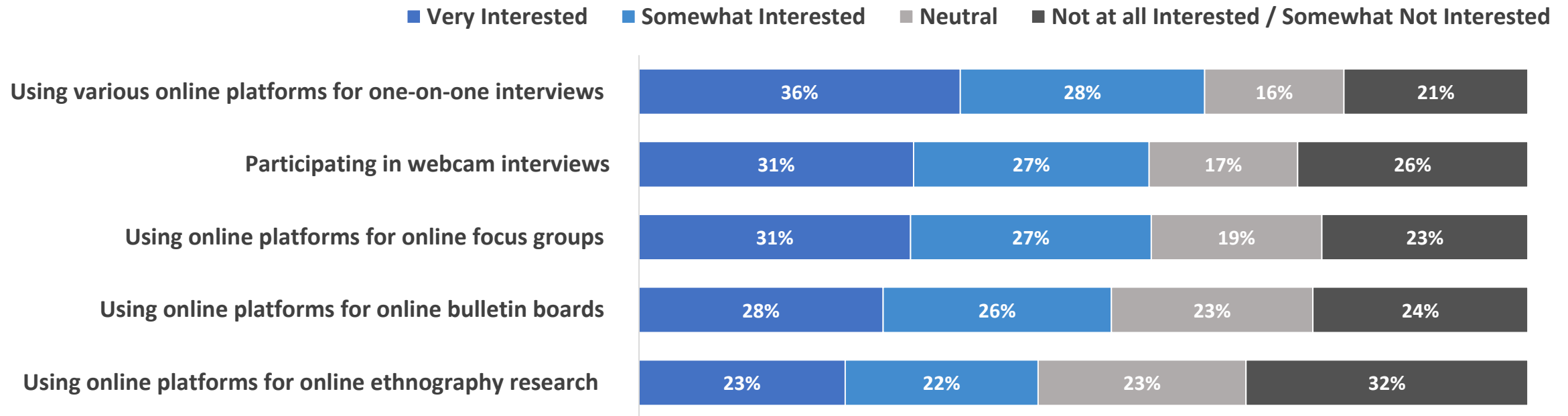
Q5 Which of the following online platforms did you use for market research purposes in 2020? Do not include use for personal or professional use outside market research?

(Base: Participating in Qualitative Research in 2020 n=649)

What is your level of interest in learning about/demonstrations on online qualitative research platforms and technologies?

Nearly half or more had interest in learning about the use of various online qualitative technologies

Technologies



Q9. Please rate your level of interest in learning about/demonstrations for technologies that support various forms of online qualitative market research
(Base: Qualified respondents n=1,507)

Nearly a half to two thirds have interest in demonstrations on technologies, but rates are lower among older physicians

Technologies

% Very Interested / Somewhat Interested by # of Years in Practice

| | # of Years in Practice | | | | | |
|--|------------------------|---------------|----------------|----------------|----------------|----------------|
| | 2 to 5 years | 6 to 10 years | 11 to 15 years | 16 to 20 years | 21 to 25 years | 26 to 30 years |
| Participating in webcam interviews | 51% | 57% | 62% | 58% | 61% | 52% |
| Using various online platforms for one-on-one interviews | 61% | 63% | 68% | 64% | 66% | 58% |
| Using online platforms for online focus groups | 55% | 57% | 63% | 59% | 63% | 48% |
| Using online platforms for online bulletin boards | 53% | 55% | 64% | 58% | 53% | 38% |
| Using online platforms for online ethnography research | 47% | 46% | 52% | 48% | 45% | 33% |

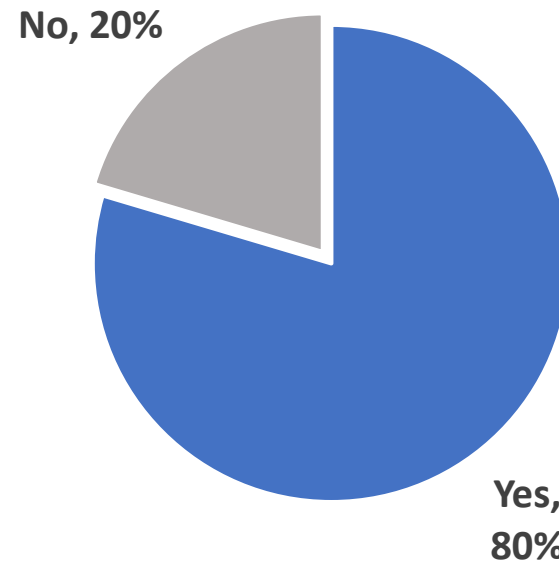
Q9. Please rate your level of interest in learning about/demonstrations for how to use on using technologies that support various forms of online qualitative market research

(Base: Qualified respondents n=1,507)



Eighty percent are willing to participate in a short qualitative interview to discuss results of the survey

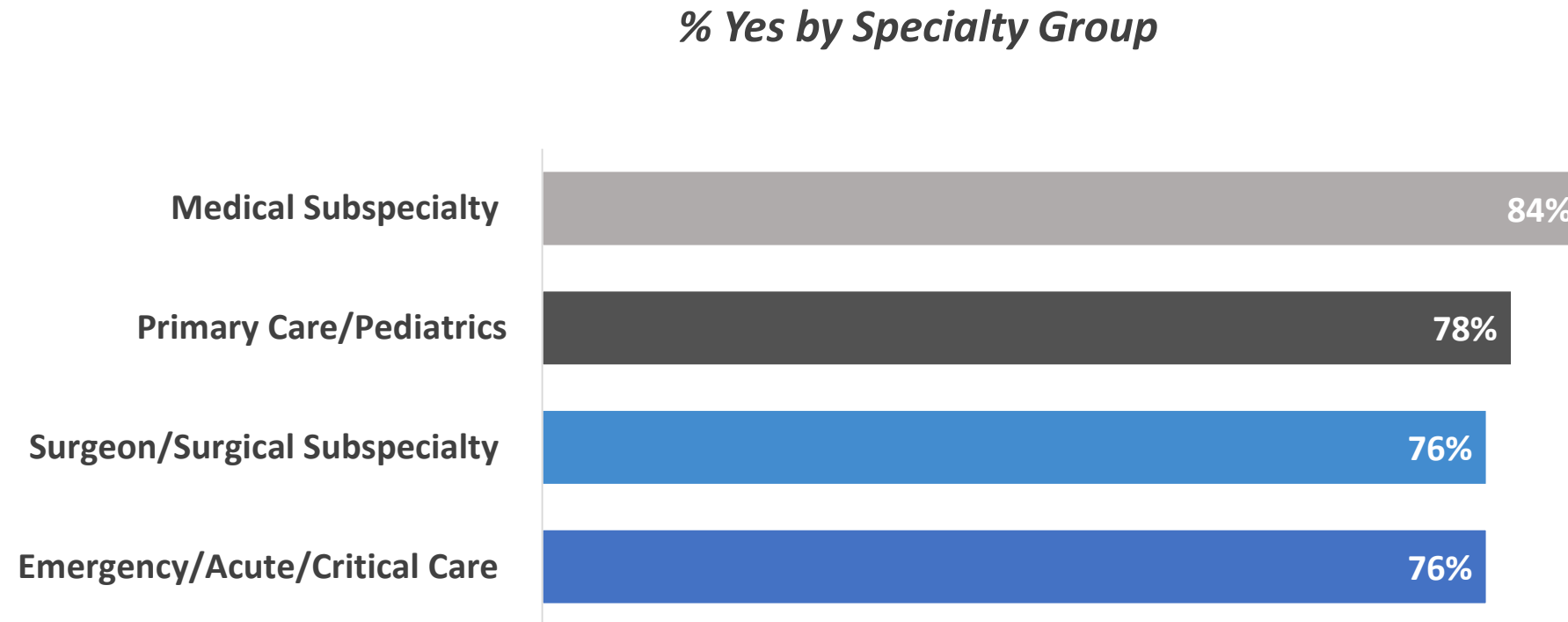
Would you be willing to consider participating in a short qualitative interview to further discuss your answers to this questionnaire?



Q13. Would you be willing to consider participating in a short qualitative interview to further discuss your answers to this questionnaire?
(Base: Qualified respondents n=1,507)



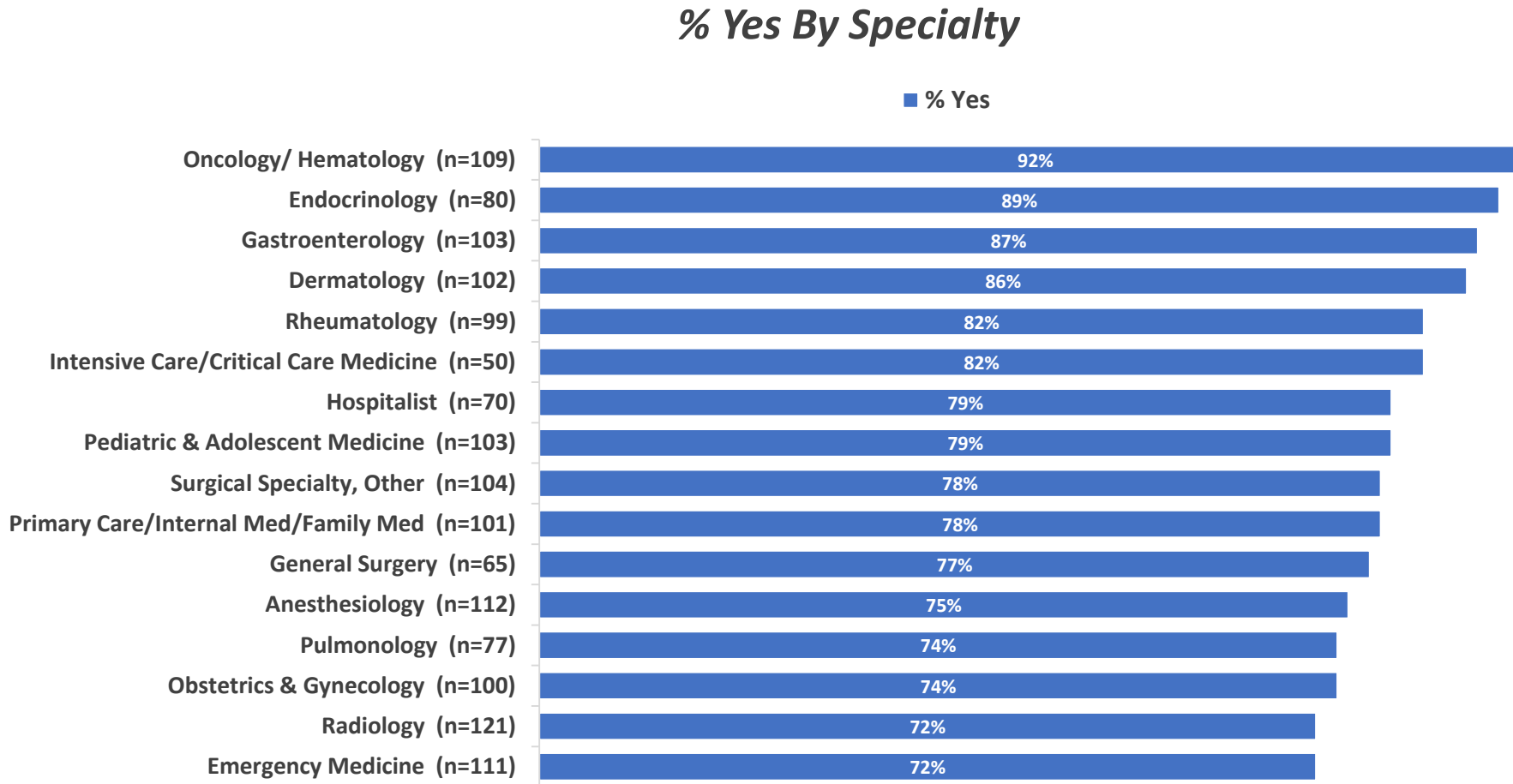
Eighty percent are willing to participate in a short qualitative interview to discuss results of the survey



Q13. Would you be willing to consider participating in a short qualitative interview to further discuss your answers to this questionnaire?
(Base: Qualified respondents n=1,507)



Nearly 80% are willing to consider a short follow up qualitative interview to discuss results



Q13. Would you be willing to consider participating in a short qualitative interview to further discuss your answers to this questionnaire?
(Base: Qualified respondents n=1,507)

Key Findings

Summary of Key Findings

- Research Participation
 - Rates of participation in 2020 thus far lag 2019 rates by approximately 2-13%
 - Participation is down across all groups (quant by med subspecialists being the least impacted)
 - These rates may be due to 2020 only reflecting 3 months versus a full year in 2019
 - We don't know if declines are due to less participation (numerator) or less studies being available (denominator)
- Qualitative Research
 - Participation in qualitative research activities in 2020 is about half that of quantitative studies
 - Early career physicians were less likely to participate in qualitative research for uncertain reasons
 - Rates of research participation varies greatly by the type of qualitative research
 - The highest interest in qualitative research is for online and one on one studies, versus groups and in-person research

Summary of Key Findings

- Availability and Interest in Market Research
 - Nearly two thirds have *more time* for participation in market research as a result of the pandemic
 - Availability varies based on medical specialty with the Surgical and Medical Subspecialty groups more likely to report having more time
 - Approximately 20-30% of Acute Care and Emergency Medicine Physicians report *less* or *much less* time
 - Approximately half report having increased interest in participating in market research as a result of the pandemic
- Use of and Interest in Learning about Web-based and Virtual Platforms
 - Platforms used for personal, professional and research activities varies and is increasing
 - The specific platforms used appears to be evolving between 2019 to 2020
 - Nearly half or more have interest in learning about the use of various online qualitative tech
 - Nearly a half to two thirds have interest in demonstrations on the use of various research platforms and technologies

Limitations and Next Steps

- Limitations
 - Research findings are based on a sample of panel respondents and we can't extrapolate to non-responders
- Next Steps
 - Explore rates of participation and/or barriers to participation in market research among early career physicians; especially in qualitative studies
 - Explore opportunities to help educate and train physicians on the use of various online market research and communication tools
 - Continue to monitor the impact of the evolving pandemic on availability and interest in participating in market research activities and adjust research approaches to accommodate constraints

Contact Information

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Questions and Discussion

Appendix

Response Rate / Field Summary – By Specialty

| | TERM/OQ | COMPLETE | TOTAL | IR |
|----|---------|----------|-------|------|
| AK | 0 | 1 | 1 | 100% |
| AL | 13 | 12 | 25 | 48% |
| AR | 2 | 5 | 7 | 71% |
| AZ | 32 | 40 | 72 | 56% |
| CA | 132 | 137 | 269 | 51% |
| CO | 34 | 23 | 57 | 40% |
| CT | 22 | 30 | 52 | 58% |
| DC | 4 | 4 | 8 | 50% |
| DE | 6 | 3 | 9 | 33% |
| FL | 157 | 150 | 307 | 49% |
| GA | 40 | 37 | 77 | 48% |
| HA | 1 | 0 | 1 | 0% |
| HI | 6 | 8 | 14 | 57% |
| IA | 11 | 23 | 34 | 68% |
| ID | 0 | 5 | 5 | 100% |
| IL | 60 | 83 | 143 | 58% |
| IN | 17 | 26 | 43 | 60% |
| KS | 11 | 13 | 24 | 54% |
| KY | 17 | 13 | 30 | 43% |
| LA | 17 | 10 | 27 | 37% |
| MA | 36 | 37 | 73 | 51% |
| MD | 33 | 31 | 64 | 48% |
| MI | 46 | 48 | 94 | 51% |
| MN | 22 | 27 | 49 | 55% |
| MO | 27 | 20 | 47 | 43% |
| MS | 2 | 5 | 7 | 71% |

| | TERM/OQ | COMPLETE | TOTAL | IR |
|----|---------|----------|-------|------|
| MT | 3 | 1 | 4 | 25% |
| NC | 47 | 48 | 95 | 51% |
| ND | 2 | 2 | 4 | 50% |
| NE | 6 | 7 | 13 | 54% |
| NH | 2 | 8 | 10 | 80% |
| NJ | 66 | 93 | 159 | 58% |
| NM | 6 | 3 | 9 | 33% |
| NV | 12 | 8 | 20 | 40% |
| NY | 130 | 133 | 263 | 51% |
| OH | 83 | 83 | 166 | 50% |
| OK | 12 | 6 | 18 | 33% |
| ON | 1 | 1 | 2 | 50% |
| OR | 13 | 21 | 34 | 62% |
| PA | 89 | 69 | 158 | 44% |
| RI | 5 | 5 | 10 | 50% |
| SA | 1 | 0 | 1 | 0% |
| SC | 14 | 12 | 26 | 46% |
| SD | 0 | 6 | 6 | 100% |
| TN | 12 | 20 | 32 | 63% |
| TX | 60 | 85 | 145 | 59% |
| UT | 13 | 6 | 19 | 32% |
| VA | 32 | 32 | 64 | 50% |
| WA | 33 | 26 | 59 | 44% |
| WI | 60 | 32 | 92 | 35% |
| WV | 7 | 8 | 15 | 53% |
| WY | 3 | 1 | 4 | 25% |

| | TERM/OQ | COMPLETE | TOTAL | IR |
|-----------|---------|----------|-------|-----|
| Northeast | 351 | 376 | 727 | 52% |
| Midwest | 345 | 370 | 715 | 52% |
| South | 475 | 481 | 956 | 50% |
| West | 288 | 280 | 568 | 49% |

(Base: All screener respondents n=2,967)

Screened Participants

Have you participated in quantitative or qualitative market research studies in 2019 and thus far in 2020?

- *Screened Qualified Respondents participated in at least some research*

AMONG SCREENER RESPONDENTS

| | 2019 | 2020 |
|--|----------------|----------------|
| Quantitative Research AND Qualitative Research | 33% (n=984) | 26% (n=759) |
| Quantitative Research ONLY | 30% (n=898) | 34% (n=996) |
| Qualitative Research ONLY | 2% (n=54) | 2% (n=51) |
| Neither Quantitative nor Qualitative Research | 15% (n=458) | 20% (n=588) |
| Terminated prior to S8 | 19% (n=573) | 19% (n=573) |

N=414 SCREENER respondents did not participate in Quantitative or Qualitative Research in 2019 OR 2020

These respondents were terminated.

(Base: All screener respondents n=2,967)



Research Participation – By Specialty

Which of the following types of qualitative (interview/discussion) market research did you participate in 2019?

By Specialty

| | 1-on-1 phone interview w/ web platform | 1-on-1 phone interview | 1-on-1 phone interview w/ webcam | In-person “interview” | Online focus group using web platform / webcam | Online “bulletin board” | In-person “focus group” | “Online ethnography” | In-person “ethnography” |
|--|--|---------------------------|--|--------------------------|--|----------------------------|----------------------------|-------------------------|----------------------------|
| Primary Care/Internal Med/Family Med (n=101) | 71% | 62% | 51% | 51% | 42% | 49% | 33% | 13% | 4% |
| Pediatric & Adolescent Medicine (n=103) | 83% | 69% | 60% | 42% | 40% | 23% | 33% | 13% | 8% |
| Hospitalist (n=70) | 88% | 79% | 61% | 48% | 55% | 42% | 42% | 18% | 12% |
| Intensive Care/Critical Care Medicine (n=50) | 87% | 74% | 52% | 43% | 39% | 39% | 22% | 13% | 4% |
| Emergency Medicine (n=111) | 75% | 67% | 33% | 35% | 29% | 25% | 40% | 10% | 2% |
| General Surgery (n=65) | 76% | 61% | 36% | 33% | 30% | 36% | 42% | 24% | 9% |
| Surgical Specialty, Other (n=104) | 86% | 71% | 45% | 50% | 27% | 25% | 27% | 9% | 2% |
| Obstetrics & Gynecology (n=100) | 82% | 71% | 62% | 51% | 49% | 38% | 42% | 16% | 4% |
| Anesthesiology (n=112) | 77% | 68% | 41% | 50% | 32% | 41% | 39% | 14% | 7% |
| Radiology (n=121) | 82% | 77% | 32% | 30% | 23% | 23% | 25% | 14% | 2% |
| Rheumatology (n=99) | 94% | 89% | 82% | 49% | 58% | 57% | 32% | 25% | 18% |
| Gastroenterology (n=103) | 94% | 83% | 83% | 48% | 57% | 48% | 40% | 17% | 13% |
| Dermatology (n=102) | 94% | 78% | 75% | 54% | 55% | 32% | 45% | 12% | 9% |
| Oncology/ Hematology (n=109) | 87% | 91% | 78% | 56% | 53% | 57% | 49% | 25% | 8% |
| Endocrinology (n=80) | 89% | 74% | 75% | 56% | 63% | 42% | 42% | 16% | 12% |
| Pulmonology (n=77) | 84% | 79% | 70% | 51% | 51% | 51% | 44% | 21% | 9% |

Q2. Which of the following types of qualitative (interview/discussion) market research did you participate in 2019?
(Base: Qualified respondents participating in Qualitative Research n=833)

Average number of years in practice – By Specialty

How many years have you been in practice beyond your residency and fellowship? - By Specialty

** Screened Qualified Respondents have been in practice between 2 & 30 years*

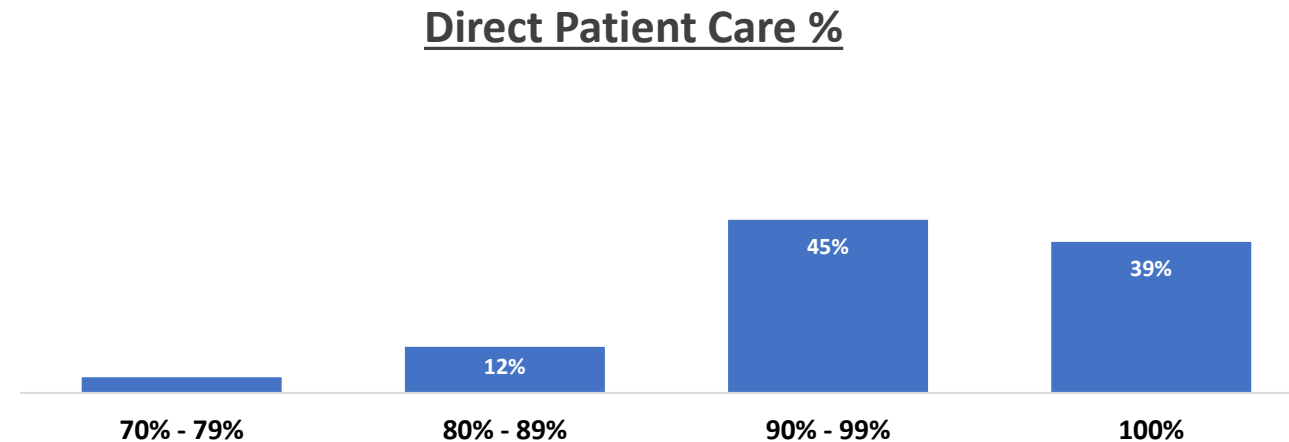
| | Avg # of Years |
|--|----------------|
| Obstetrics & Gynecology (n=100) | 20.7 |
| Primary Care/Internal Med/Family Med (n=101) | 20.6 |
| Pediatric & Adolescent Medicine (n=103) | 19.8 |
| Gastroenterology (n=103) | 19.3 |
| Pulmonology (n=77) | 18.9 |
| Surgical Specialty, Other (n=104) | 18.6 |
| Anesthesiology (n=112) | 17.7 |
| Endocrinology (n=80) | 17.5 |
| Dermatology (n=102) | 17.1 |
| Rheumatology (n=99) | 16.5 |
| Radiology (n=121) | 16.2 |
| Oncology/ Hematology (n=109) | 15.7 |
| Emergency Medicine (n=111) | 15.6 |
| General Surgery (n=65) | 15.3 |
| Hospitalist (n=70) | 14.3 |
| Intensive Care/Critical Care Medicine (n=50) | 14.2 |

S4 How many years have you been in practice beyond your residency and fellowship? (Base: Qualified respondents n=1,507)

Most spent at least 90% of their time in direct patient care

Prior to the COVID-19 outbreak, what percentage of your professional time was devoted to direct patient care, as opposed to research, teaching, or administrative duties?

** Screened Qualified Respondents devote at least 70% of their time to direct patient care*



*S4 Prior to the COVID-19 outbreak, what percentage of your professional time was devoted to direct patient care, as opposed to research, teaching, or administrative duties?
(Base: Qualified respondents n=1,507)*

Emergency Medicine and Anesthesiology physicians were less likely to have participated in longer online surveys



Which of the following types of quantitative (survey) market research did you participate in during 2019?

By Specialty

| | Short online | Medium online | Long online | Paper/ Fax |
|--|--------------|---------------|-------------|------------|
| Primary Care/Internal Med/Family Med (n=101) | 96% | 100% | 81% | 19% |
| Pediatric & Adolescent Medicine (n=103) | 96% | 97% | 65% | 17% |
| Hospitalist (n=70) | 92% | 94% | 76% | 15% |
| Intensive Care/Critical Care Medicine (n=50) | 85% | 96% | 74% | 17% |
| Emergency Medicine (n=111) | 95% | 93% | 58% | 10% |
| General Surgery (n=65) | 94% | 97% | 76% | 11% |
| Surgical Specialty, Other (n=104) | 96% | 98% | 76% | 8% |
| Obstetrics & Gynecology (n=100) | 98% | 97% | 76% | 15% |
| Anesthesiology (n=112) | 94% | 96% | 58% | 11% |
| Radiology (n=121) | 90% | 90% | 62% | 8% |
| Rheumatology (n=99) | 95% | 99% | 91% | 22% |
| Gastroenterology (n=103) | 96% | 98% | 87% | 23% |
| Dermatology (n=102) | 91% | 98% | 94% | 19% |
| Oncology/ Hematology (n=109) | 97% | 100% | 88% | 20% |
| Endocrinology (n=80) | 95% | 100% | 87% | 24% |
| Pulmonology (n=77) | 96% | 97% | 91% | 16% |

Q1. Which of the following types of quantitative (survey) market research did you participate in during 2019?

(Base: Qualified respondents participating in Quantitative Research in 2019: n=1,434)



Prior participation versus further interest – Among those in practice for 26-30 years

Which of the following types of qualitative (interview/discussion) market research **did you participate in** 2019?

AND

Thinking about your interest in participating in qualitative market research in the next three months, please rate

your level of interest in participation in the various forms of market research

Among those in Practice 26-30 Years

| In Practice 26-30 Years: | 2019 Participation | Top 2 Box % Future Interest |
|---|--------------------|-----------------------------|
| One-on-one telephone interview w/ web sharing | 87% | 67% |
| One-on-one telephone interview | 74% | 68% |
| One-on-one telephone interview with webcam | 63% | 56% |
| In-person “interview” | 55% | 47% |
| Online focus group using web platform | 38% | 50% |
| Online “bulletin board” | 35% | 42% |
| In-person “focus group” | 38% | 44% |
| “Online ethnography” | 16% | 29% |
| In-person “ethnography” | 5% | 17% |

Almost half of respondents participate in quant research only

| | 2019 | 2020 |
|--|----------------|----------------|
| Quantitative Research AND Qualitative Research | 53% (n=793) | 41% (n=614) |
| Quantitative Research ONLY | 43% (n=641) | 49% (n=737) |
| Qualitative Research ONLY | 3% (n=40) | 2% (n=35) |

*S1. Have you participated in quantitative or qualitative market research studies in 2019 and thus far in 2020?
(Base: Qualified respondents n=1,507)*

Response Rate / Field Summary – By Specialty

| SPECIALTY/GROUP | Target Quota | # of Completes | # of Terminations | Incidence Rate | # of Invitations Sent | Response Rate | Historical Response Rate | Response Rate |
|--------------------------|--------------|----------------|-------------------|----------------|-----------------------|---------------|--------------------------|---------------|
| PCP (FP/GP/IM) | 100 | 101 | 93 | 52% | 52,485 | 0.5% | 2.0% | 2.0% |
| Pediatrics | 100 | 103 | 78 | 57% | 35,434 | 0.7% | 2.0% | 1.3 |
| Hospitalist | 100 | 70 | 27 | 72% | 3,591 | 1.4% | 3.0% | 1.6 |
| Intensivist | 100 | 50 | 25 | 67% | 2,816 | 1.2% | 3.0% | 1.8 |
| Emergency Medicine | 100 | 111 | 160 | 41% | 13,398 | 1.5% | 3.0% | 1.5 |
| General Surgery | 100 | 65 | 34 | 66% | 15,367 | 1.0% | 3.0% | 2.0 |
| Other Surgical Specialty | 100 | 104 | 39 | 73% | N/A | N/A | N/A | |
| Obstetrics & Gynecology | 100 | 100 | 70 | 59% | 17,994 | 1.0% | 2.0% | 1.0 |
| Anesthesiology | 100 | 112 | 170 | 40% | 18,029 | 1.1% | 2.0% | 0.9 |
| Radiology | 100 | 121 | 73 | 62% | 14,202 | 1.0% | 2.0% | 1.0 |
| Rheumatology | 100 | 99 | 7 | 93% | 2,816 | 1.1% | 4.0% | 2.7 |
| Gastroenterology | 100 | 103 | 37 | 74% | 8,367 | 1.0% | 3.0% | 2.0 |
| Dermatology | 100 | 102 | 48 | 68% | 4,608 | 1.5% | 5.0% | 3.5 |
| Oncology | 100 | 100 | 19 | 84% | 11,359 | 0.6% | 3.0% | 2.4 |
| Hematology | | 9 | 5 | 64% | | | | |
| Endocrinology | 100 | 80 | 21 | 79% | 2,802 | 1.2% | 4.0% | 2.8 |
| Pulmonology | 50 | 77 | 25 | 75% | 5,115 | 0.9% | 2.0% | 1.1 |
| TOTAL | 1,650 | 1,507 | 987 | 60% | 208,383 | | | |

(Base: All screener respondents n=2,967)



Respondents who did not participate in Qualitative research in 2019 show interest in future research opportunities

To what level does prior qualitative research participation impact future interest?

| | QUALITATIVE RESEARCH PARTICIPATION 2019 | | | | | | | | | |
|---|---|------------------------|----------------------------------|-----------------------|--|-------------------------|-------------------------|----------------------|-------------------------|----------------------------------|
| | 1-on-1 phone interview w/ web platform | 1-on-1 phone interview | 1-on-1 phone interview w/ webcam | In-person "interview" | Online focus group using web platform / webcam | Online "bulletin board" | In-person "focus group" | "Online ethnography" | In-person "ethnography" | DID NOT PARTICIPATE in QUAL 2019 |
| One-on-one telephone interview w/ online web sharing platform | 95% | 93% | 95% | 93% | 93% | 92% | 92% | 90% | 89% | 44% |
| One-on-one telephone interview (no computer involved) | 94% | 94% | 93% | 93% | 92% | 89% | 90% | 89% | 88% | 44% |
| One-on-one telephone interview with webcam | 87% | 87% | 94% | 89% | 91% | 88% | 89% | 87% | 89% | 33% |
| In-person "interview" | 61% | 62% | 65% | 78% | 64% | 61% | 75% | 65% | 82% | 27% |
| Online focus group using web enabled platform and webcam | 81% | 80% | 88% | 82% | 90% | 85% | 85% | 87% | 88% | 33% |
| Online "bulletin board" | 68% | 68% | 72% | 66% | 75% | 86% | 68% | 85% | 83% | 41% |
| In-person "focus group" | 59% | 60% | 63% | 74% | 64% | 60% | 77% | 67% | 85% | 25% |
| "Online ethnography" | 53% | 54% | 57% | 55% | 63% | 66% | 57% | 82% | 80% | 24% |
| In-person "ethnography" | 32% | 33% | 33% | 37% | 36% | 37% | 37% | 51% | 77% | 12% |

Q2. Which of the following types of qualitative (interview/discussion) market research did you participate in 2019?

Q8. Thinking about your interest in participating in qualitative (interview/discussion) market research in the next three months, please rate your level on interest in participation in the various forms of market research (Base: Qualified respondents n=1,507)