

INSPIRING BETTER HEALTHCARE **DIGITAL & CONNECTED HEALTH**

Digital Doctor 2020, Nordic Version

4 Nordic country survey among 200 primary care physicians

- Exploring attitudes to digital and connected health
- Looking at ownership and use of connected health
- Covering channel usage
- Examining awareness and use of telehealth/virtual care
- Uncovering awareness, understanding and use of Digital Therapeutics (DTx)

Ipsos is excited to announce the launch of its Digital Doctor 2020 survey: A Nordic quantitative study to understand Doctors' perceptions, usage and opportunities within digital and connected health



Comprehensive overview of digital behaviour and future trends among primary care practitioners across the Nordic countries, with data available for Sweden, Denmark, Norway and Finland – Ipsos is the only company currently providing this information.



Important insights into what Doctors really think about digital channels/activities, awareness and usage of these, and how this might change going forward – vital information for enabling clients to optimally shape and position their digital offerings.



Thorough understanding of the latest developments in digital and connected health, including patient-generated health data, telehealth medicine and digital therapeutics – crucial to ensuring clients stay up to date and relevant in a rapidly evolving area.



Significant logistical benefits – the investment is cost-effective and quick (no need to design and execute an ad-hoc study), non-therapy area specific (therefore providing a broad generalizable overview), and benefits from a large sample that can be stratified into groups of interest (i.e. age, generation).

21 countries included in Global Digital Doctor 2020 and 4 countries included in the Nordic version.

Europe: UK, France, Italy, Spain, Germany, Belgium, Netherlands

North America: USA, Canada

LATAM: Colombia, Brazil

APAC: Australia, India, Japan, China, Hong Kong, Malaysia, Singapore, Indonesia, South Korea, Vietnam

Nordic: Sweden, Denmark, Finland and Norway (not included in the Global report)

Global report available for £18,500 GBP/\$24,200 USD

Nordic report (Sweden, Denmark, Finland, Norway) for SEK 100 000

Digital Doctor 2020 - Report structure and content

Awareness and knowledge

We presented physicians with a number of different digital concepts related to healthcare such as telehealth/telemedicine, artificial intelligence, remote patient monitoring, robotics etc. and asked to rate their awareness and knowledge.

Current channel usage and usefulness of each channel

We showed a number of different channels to physicians (a mix of online/offline channels such as: discussions with colleagues/peers, in-person events/meetings, online webinars, pharma websites, online study modules etc.) and asked them which of the following channels they have used in the last three months and how useful they found them.

Connected Health

Attitudes and Usage: Here we explore professional usage of connected health devices, reasons for using these connected health devices (e.g. medical education and training, health record maintenance, clinical decision making, communication, etc.). We also address concerns here around connected health devices relating to patients (e.g. patients misinterpret data and advice), to data (e.g. security and reliability of data), to lack of training and available information and concerns around reimbursement, regulation and impact on workflow).

Outcomes

We focused on the outcomes of connected health to physicians. We have asked a question on total level around their agreement with a range of statements in relation to outcomes of using connected health devices or tools (e.g. allows patients to store personal health information securely, provides patients with greater access to their own personal health information, creates the opportunity for early therapeutic intervention etc.) to better understand how physicians view connected health devices. We have also asked a similar question to those who have recommended a connected health device to their patients, their views around how connected health had an impact to themselves and their patients.

Telehealth/virtual care

We wanted to understand more about current levels of usage of telehealth and barriers of usage (such as lack of training, limited technology infrastructure), as well as likelihood to practice telehealth in the next 12 months.

Digital therapeutics (DTx)

Here we asked respondents of their spontaneous definitions of DTx. Then we provided the official definition of DTx and asked how aware they were of this definition. We presented some statements to understand their sentiment and understanding of DTx (e.g. I am optimistic about it, patients will request a DTx instead of a pill in the next 5 years, etc.). We also captured the current prescribing levels of DTx, how do they anticipate this will change in the next 5 years, and how can we encourage prescription levels (e.g. by providing clinical evidence etc.).



A total of 200 interviews with GPs will be carried out with an even split between the Nordic countries. Fieldwork will be carried out in May/June with the report available in August 2020. Questions around COVID-19 will be included with the purpose to explore how attitudes and usage have been impacted. The study will only be carried out if 3 pharmaceutical companies agree to buy.

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