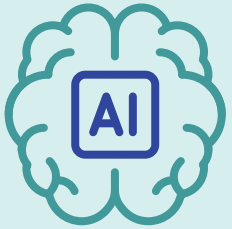


DIGITAL DOCTOR 2023

HEALTH TRACKER SURVEY |
Making a Difference



The tech trends influencing doctors



Generative Artificial Intelligence for Health, to drive clinical decision making



Rise of Clinical and Patient influencers on social media



Patient generated health data for personalised health services



At home health and monitoring services



TechQuity for better design and deployment of health tech solutions



Clearer reimbursement pathways + evidence for patient apps to facilitate inclusion within healthcare systems

Markets covered and screening criteria

3,428 healthcare professionals (HCPs) across 20 markets

For respondents to qualify they had to:

- Have 2-35 years experience in current role
- Be more than 25 years old
- Paediatricians (Paeds) to recommend/ prescribe/ administer vaccines

Market	PCPs	Paeds	Oncs	Neuros
UK	100	70	61	60
France	100	70	60	60
Italy	100	70	60	60
Spain	100	71	60	60
Germany	100	70	60	60
USA	200	72	60	60
Turkey	100	50		
India	150	50		
China	151	71		
Japan	100	71		
South Korea	50	50		
Vietnam	50	50		
Australia	51	40		
Brazil	100	50		
Belgium	50			
Netherlands	50			
Ireland	50			
Canada	100			
Algeria	100			
Hong Kong S.A.R.	50			

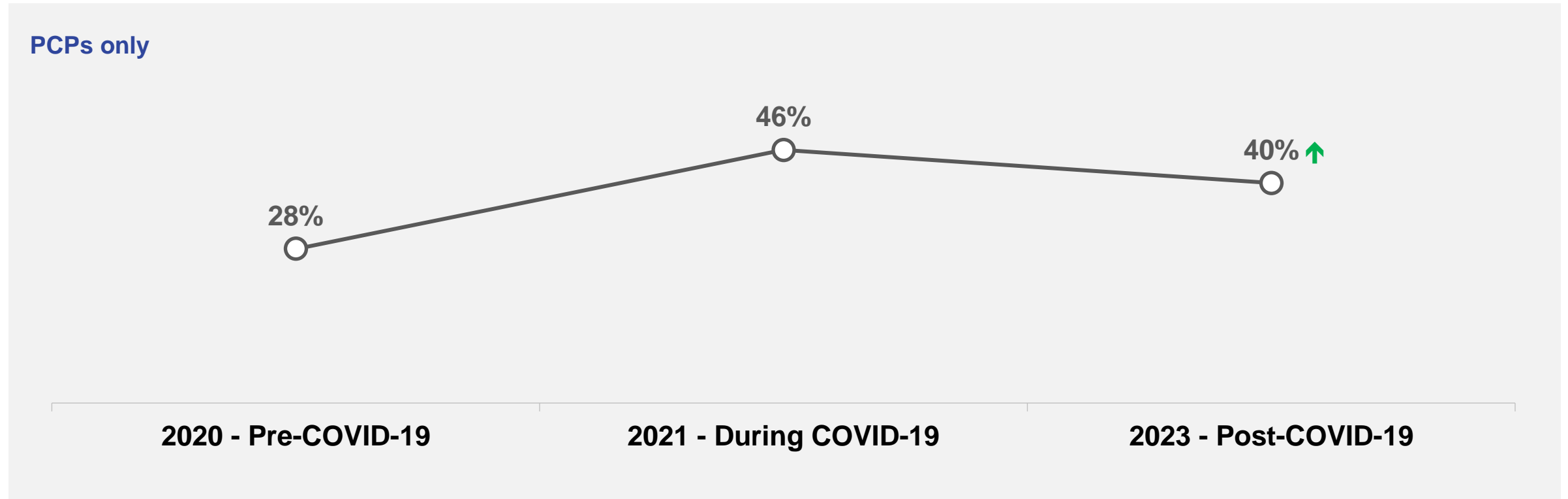
Fieldwork took place between October 2022 – March 2023

**It is clear that
Telehealth is here to
stay: A shift in remote
engagement points to a
new post-pandemic
“normal” for telehealth**



Telehealth has become now a reality and an integral part of Healthcare for four in 10 HCPs, globally. Increasing significantly vs. Pre-COVID-19

% currently using telehealth solutions



Source: Q13a. In relation to patient care, are you currently or did you in the past practise medicine virtually via telehealth solutions?

Base: All respondents in W1 (n= 1,268), W2 (n= 1,454), W3 (n= 3,428)

↑/↓ Indicates statistically significant difference with 2020 wave

However, key challenges remain around ability to accurately diagnose conditions remotely and HCPs are worried about their ability to provide good care

Telehealth challenges

46%



Ability to accurately diagnose conditions remotely

32%



Quality of care HCPs are able to provide via telehealth

31%



Digital / technological literacy amongst patients and physicians

Source: Q13J. Please rank the below statements in order of the degree of challenge they pose, if any, for the implementation of telehealth solutions from your perspective?

Base: W3'23: All respondents (n= 3,428)

Results shown based on % of HCPs selecting each statement in their top 3

Opportunity exists to further drive adoption of Artificial Intelligence (AI) and Digital Therapeutics (DTx); but there is still work to be done



68%

Agree* that they are excited about the role of Artificial Intelligence in the future of healthcare

*Top 2 Box: On a scale of 1-7, where 1 is 'completely disagree' and 7 is 'completely agree'

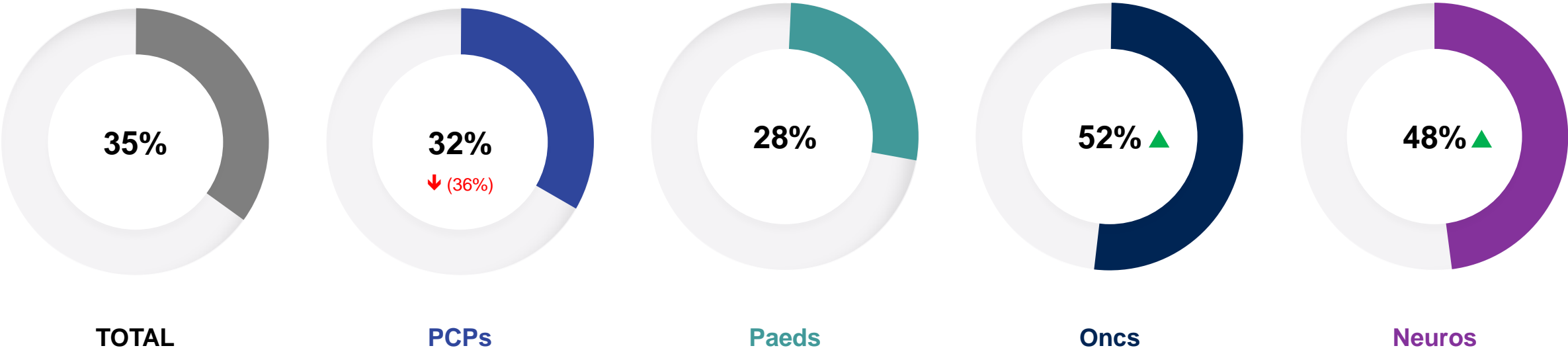
Source: Q3. On a scale of 1 to 7, where 1 is 'completely disagree' and 7 is 'completely agree', please indicate the extent you agree or disagree with the following statements relating to connected health devices and digital activities.
Base: All respondents (n= 3,428)



Although excitement is seen across specialties, Oncologists and Neurologists claim to be more knowledgeable around AI compared to PCPs & Paediatricians

% selected 'Know a lot' about AI

Artificial Intelligence (AI)



Source: Q1. To what extent are you aware or not aware of the following technologies and solutions in relation to healthcare?
Base: All respondents n= Total (n=3428), PCPs (n=1852), Paeds (n=855), Oncologists (n=361), Neurologists (n=360)

▲ ▼ Higher/lower than other specialty
▲ ▼ Indicates statistically significant difference previous wave



HCPs see the benefits of AI especially around automation and improvements in diagnosis



Top 3 Benefits



45%
Believe AI automates repetitive tasks



40%
Believe AI improves efficiency of diagnosis



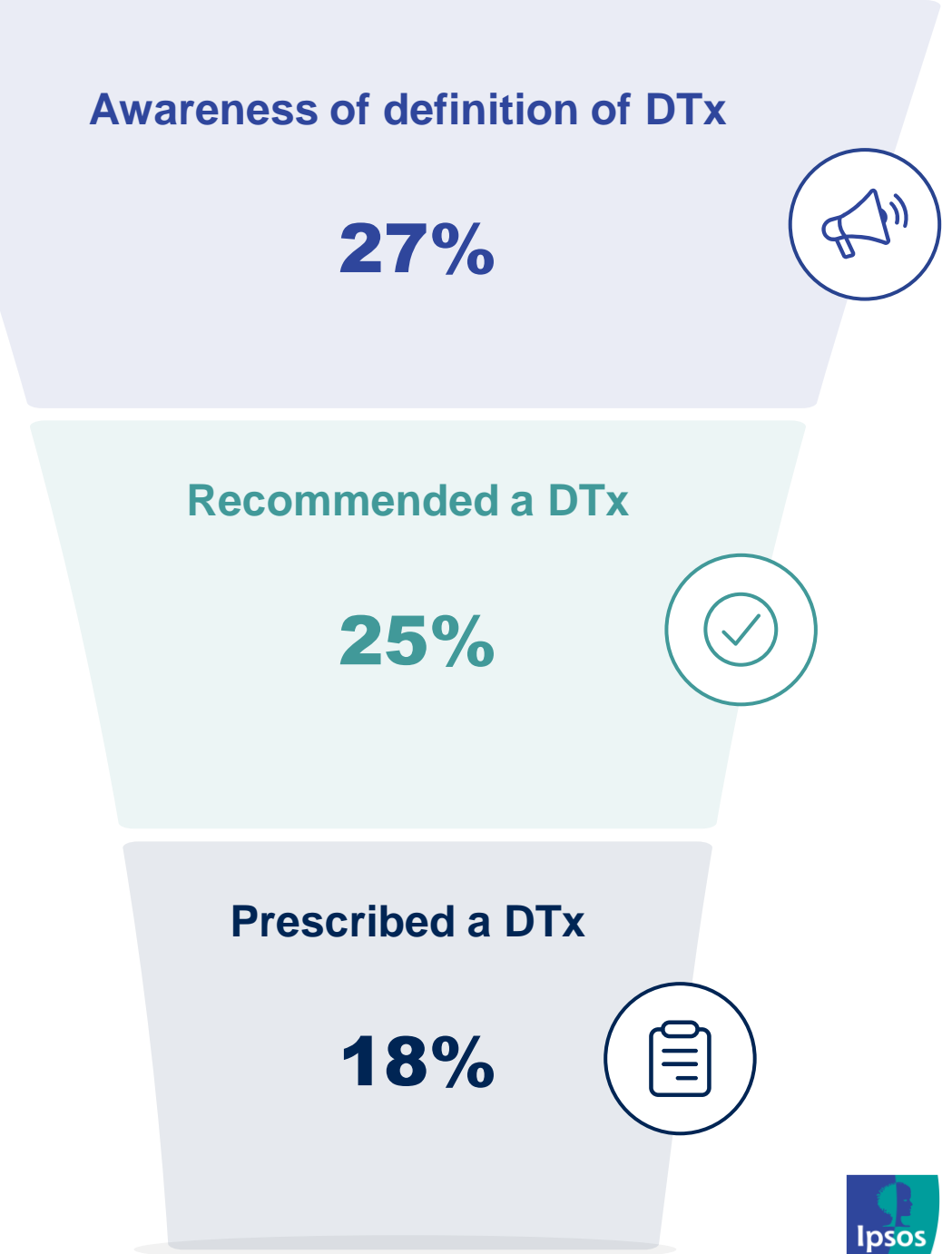
40%
Believe AI improves accuracy of diagnosis

Source: Q21. Which of the following do you believe are the main benefits of artificial intelligence solutions, if any?
Base: All respondents (n= 3,428)

Results shown based on % of HCPs selecting each statement

Around a third are aware of the definition of Digital Therapeutics (DTx), however, recommendation and prescription levels remain low

*Source: Q14. Were you previously aware of this definition? Q15. Regarding digital therapeutics, have you done either of the following?
Base: All respondents (n= 3,428)*



Not having enough training on how to use DTx as well as a belief that they lack efficacy and sufficient clinical evidence are the main issues with DTx

Agreement with statements (Top 2 Box*)



62%

There is not enough training on how to use DTx



48%

Not all DTx treatments are effective



45%

There is not enough clinical evidence on DTx

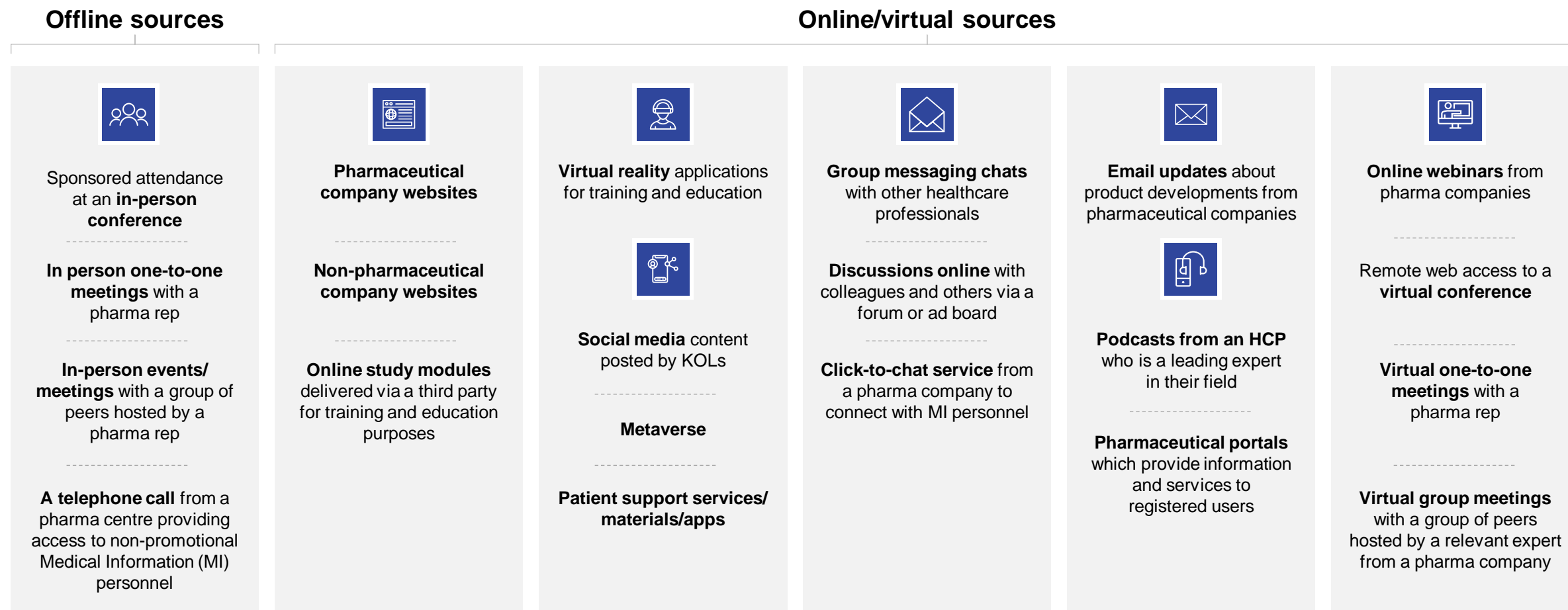
Source: Q16. To what extent do you agree or disagree with the following statements:

Base: All respondents (n= 3,428)

**Results shown based on Top 2 Box (1-5 on a scale where 1 = Completely disagree and 5 = Completely agree)*

The multichannel landscape: communicating with HCPs

Ecosystem of physical and digital channels included in our survey



Source: Q10. Which of the following sources of information, if any, have you used in the last 3 months to obtain medical information to support your everyday clinical practice?

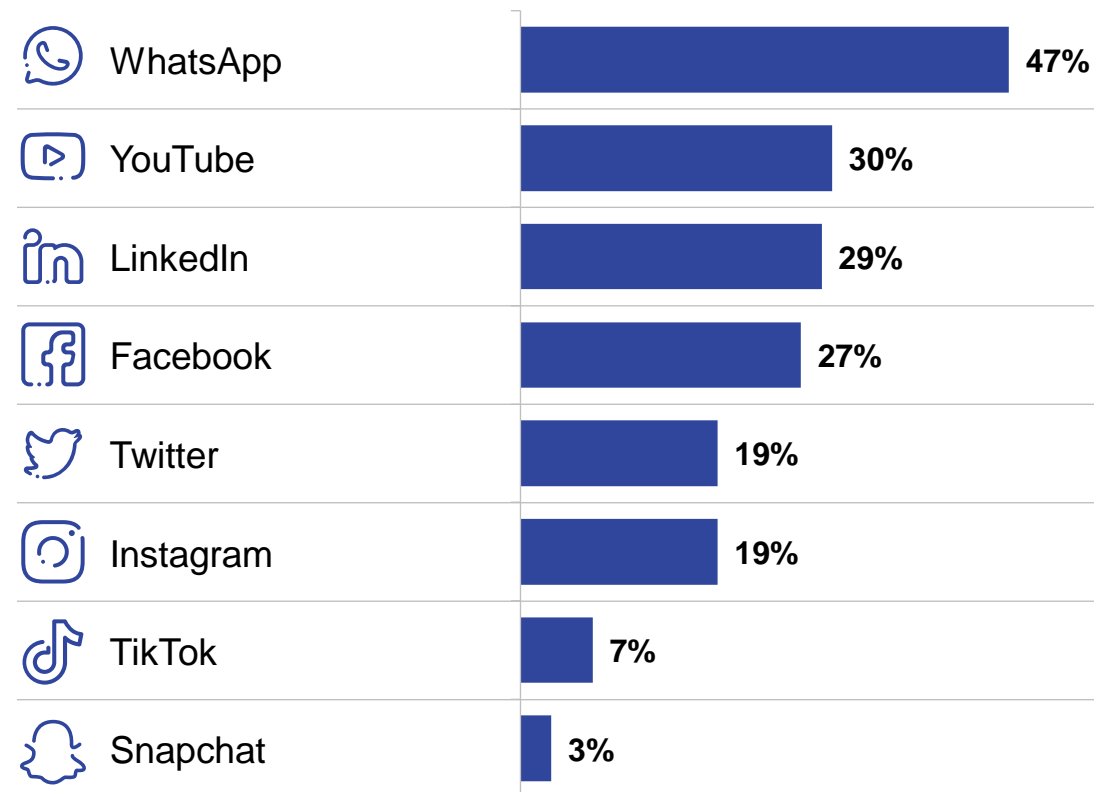
Base: All respondents (n= 3,428)

An omnichannel reality is becoming evident, however, a mind shift towards a more consumer centric model is required



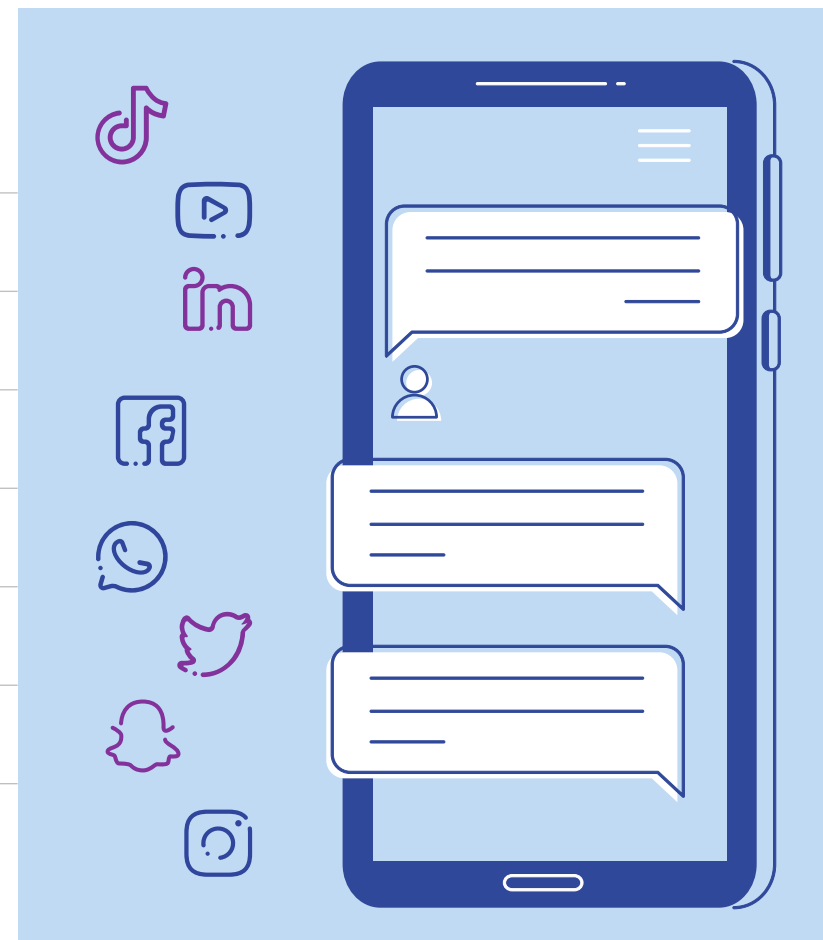
WhatsApp seems to be the main platform HCPs will interact with for professional reasons; around a third will also use YouTube, LinkedIn and Facebook

Global usage of Social Media platforms



Source: Q12b. Which of the following social media platforms do you use, if any, for professional reasons?

Base: All respondents Total (n= 3,428)

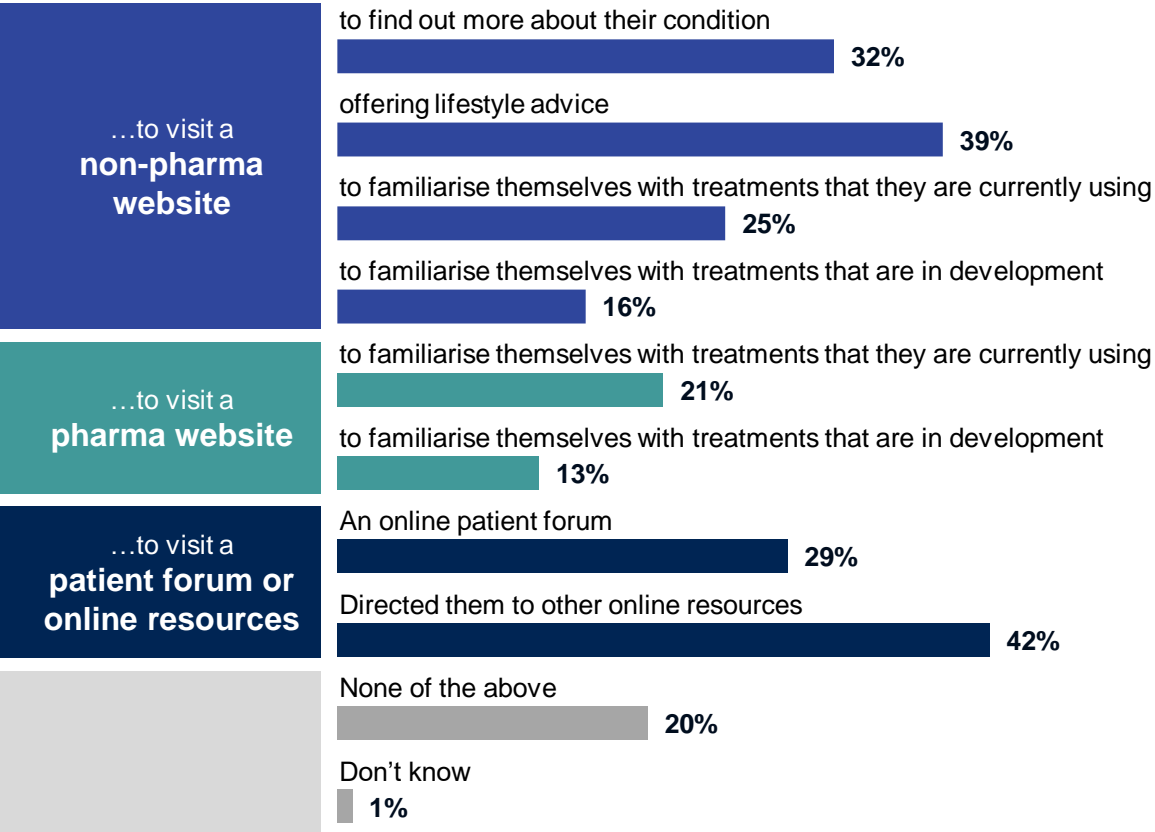


Results shown based on % of HCPs selecting each statement



HCPs most typically direct patients to non-pharma sites offering lifestyle advice and to other online resources

In the past year I have recommended to my patients...



Source: Q5 In the past year, which of the following, if any, have you recommended for your patients? Base: W3'23: All respondents (n=3,428)
Q5a Could you please provide us with more details around the specific sources which you recommend to patients? Base: W3'23: All respondents who have recommended a source to their patients (n=2,708)

Specific sources recommended

"Self-help groups are really good, e.g. MS, rare diseases, etc. Websites from certain pharma companies for certain illnesses, e.g. diabetes, migraine, etc."
PCP, Germany

"We are mostly giving out leaflets and booklets provided by the pharma companies for the specific treatment options. Mostly we use digital MS platforms to monitor patients."
Neuro, UK

"I direct patients to CDC's website cdc.gov for vaccine information. I direct patients to drugs.com for medication information. I direct patients to WebMD and Mayoclinic.org for patient information handout-type disease information."*
PCP, USA

*Centres for Disease Control and Prevention

Key Trends

1. A shift in remote engagement points to a new post-pandemic “normal” for telehealth
2. Opportunities to drive adoption of Artificial Intelligence and Digital Therapeutics
3. A move to an omnichannel reality, requiring a mind shift towards a more consumer centric model

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