

Digital Doctor

REENA SANGAR

Head of digital & connected health

Reena.Sangar@ipsos.com

Visit <https://connectedhealth.Ipsos.com/>



Ipsos Healthcare

REENA SANGAR



Reena Sangar leads Ipsos healthcare's digital research strategy focusing in particular on mobile and big data. She ensures that Ipsos develops and employs powerful capabilities in evolving digital techniques. Whether this is actively engaging with respondents via mobile, online or through passive measurement and 'big data' analytics. Reena is an experienced researcher who has a long legacy of meeting client needs across therapy area(s) and is a thought leader in connected health developments.

Reena sits on the member board for the Personal Connected Health Alliance and is a passionate advocate of embracing patient generated data. She directed the International Survey on Connected Health in 2016 and today is launching Digital Doctor 2017.

Reena Sangar

Head of Digital & Connected Health, Ipsos healthcare

Visit <https://connectedhealth.ipsos.com>



Ipsos Healthcare

PATTY MECHAE



Dr. Patricia (Patty) Mechael is executive vice president of the Personal Connected Health Alliance. Patty has a 20-year track record in global health leadership in personal connected and digital health. She is celebrated for her roles as a digital health thought leader, writer, researcher, professor and executive director of the mHealth Alliance.

She is a Rockefeller Foundation Bellagio Fellow, Johns Hopkins University Knowledge for the World Distinguished Alumnus Award Recipient, British Council UK Education Social Impact Award Recipient, member of the editorial board of the Journal of Medical Internet Research, and co-editor of the book: mHealth in Practice: Mobile technology for health promotion in the developing world. Dr. Mechael holds a PhD in Public Health and Policy from the London School of Hygiene and Tropical Medicine, a Masters in Health Science in International Health from the Johns Hopkins School of Public Health, and a Bachelor of Arts in Near Eastern Studies from the Johns Hopkins University. She is also co-founder and principal and policy lead at HealthEnabled, a South African based non-profit focused on nationally scaled integrated digital health systems, where she has been leading the development of a Global Digital Health Index.

Patricia N. Mechael, PhD, MHS

Executive Vice President of the Personal Connected Health Alliance

Visit <http://www.pchalliance.org>



Ipsos Healthcare

TRENDS IN

CONNECTED HEALTH

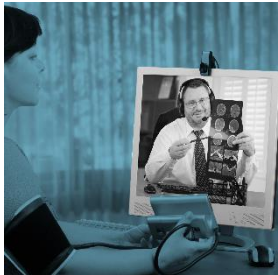




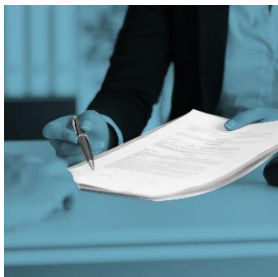
PROLIFERATION OF TECHNOLOGY AND INNOVATIONS



CONSUMERIZATION OF HEALTH



POSITIVE TRENDS IN POLICY (TELEHEALTH)



PERSONALISATION OF HEALTH



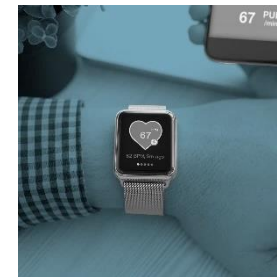
AGING POPULATION



DIGITAL THERAPEUTICS



PROVIDER/HEALTH SYSTEMS PREPAREDNESS



WEARABLES FOR FITNESS/WELLNESS

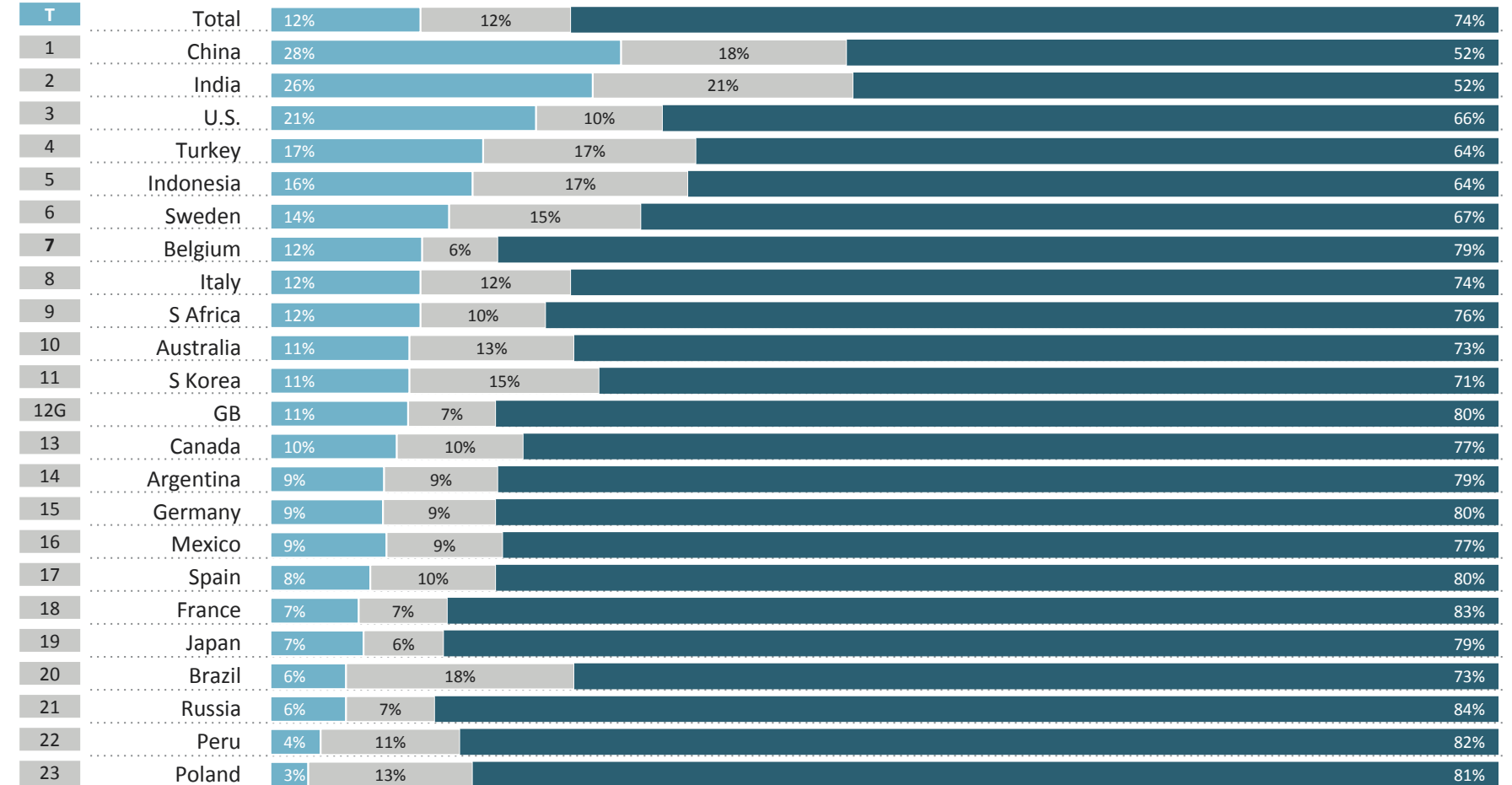


Ipsos Healthcare

CONSUMER CONNECTED HEALTH

ADOPTION

Do you currently, or have you ever, used a connected health device or tool to manage your health?



Base: 18,180 adults across 23 countries (1,002 GB), online, 12th Sep – 11th Oct 2016

KEY:



Yes, currently
2016



Formerly used,
But not using now



No, never
2016



Ipsos Healthcare

THE POWER OF THE PHYSICIAN

To accelerate adoption

To what extent do you agree or disagree, if at all, with the following statements...

If my doctor recommended that I use a connected health device or tool as part of my treatment plan I would use it

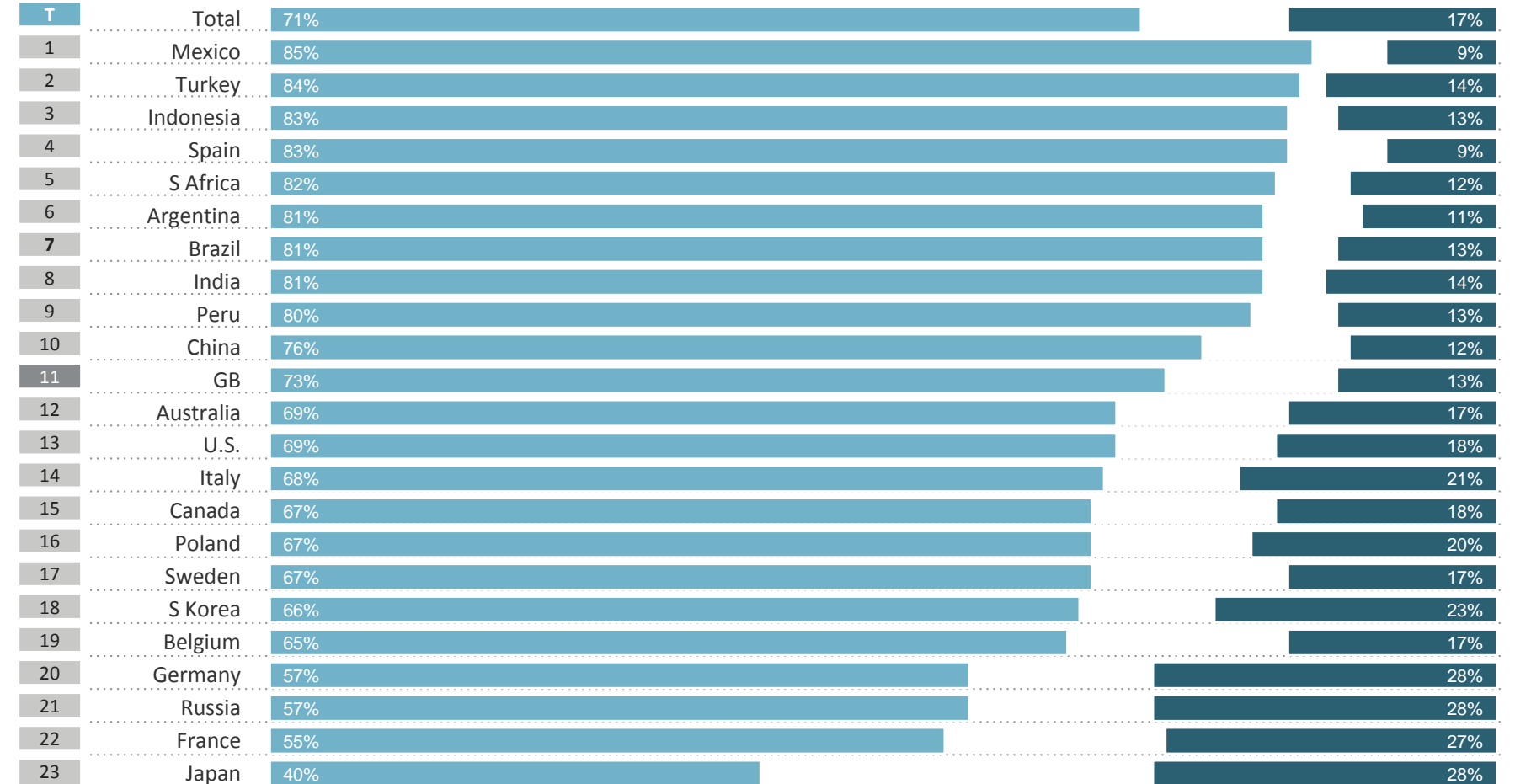
KEY:



Agree 2016



Disagree 2016



Base: 18,180 adults across 23 countries (1,002 GB), online, 12th Sep – 11th Oct 2016



Ipsos Healthcare



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

IN
18
COUNTRIES



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

DIGITAL DOCTOR 2017

Key Trends



Connected Health
is on the rise



Government advocacy
drives telemedicine



Doctor's digital behaviour
increases



It's all about patient
self management



AI brings optimism
(& anxiety!)



Apple lead as most
innovative; no consistent
winner for Pharma (yet)



A need for regulation
to reassure Doctors



Virtual Reality
for simulation



Challenging the mindset
of doctors for healthy
longevity



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

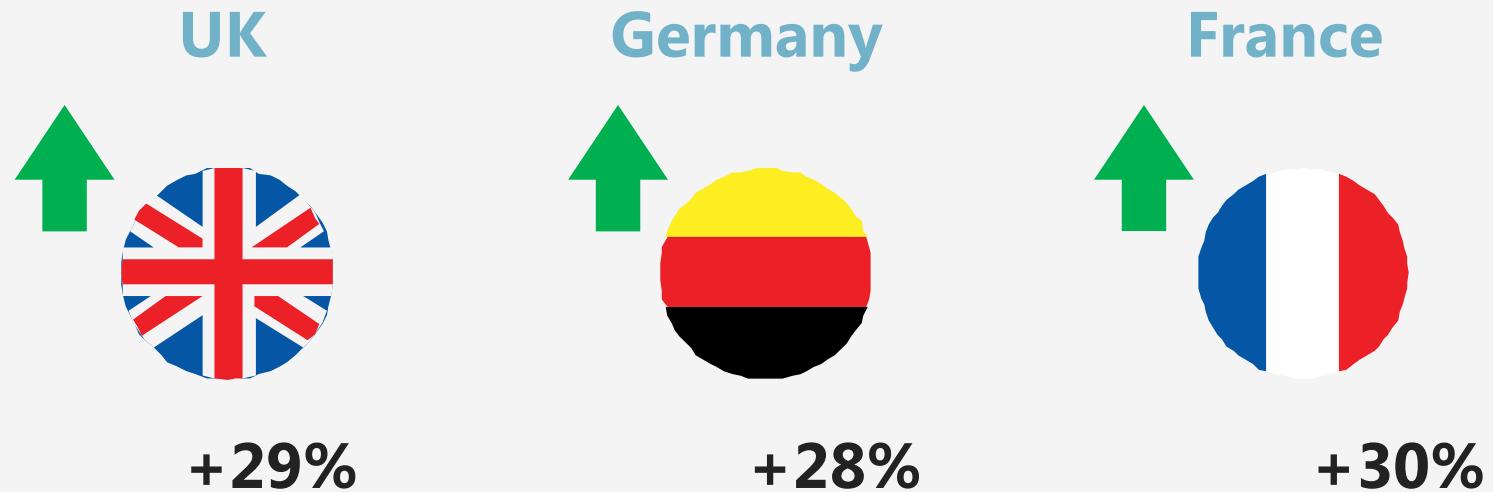
CONNECTED HEALTH

IS ON THE RISE



INCREASE IN RECOMMENDATION

2015 vs 2017



Doctors recommending smartphone apps to patients (for their own use/evaluation) has increased in all 3 markets by almost a third.

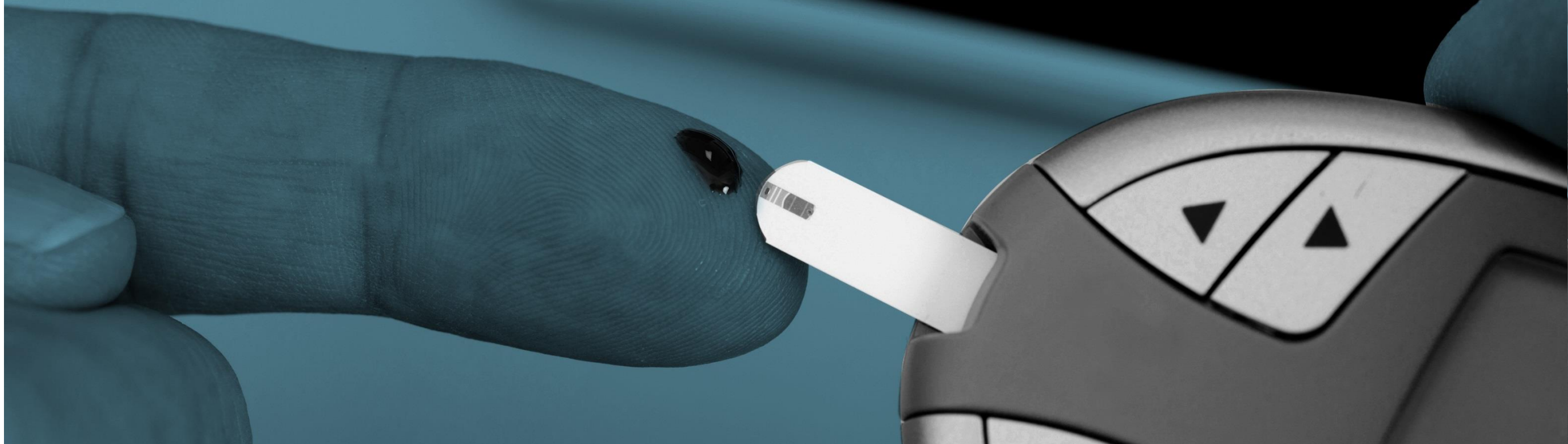


Ipsos Healthcare

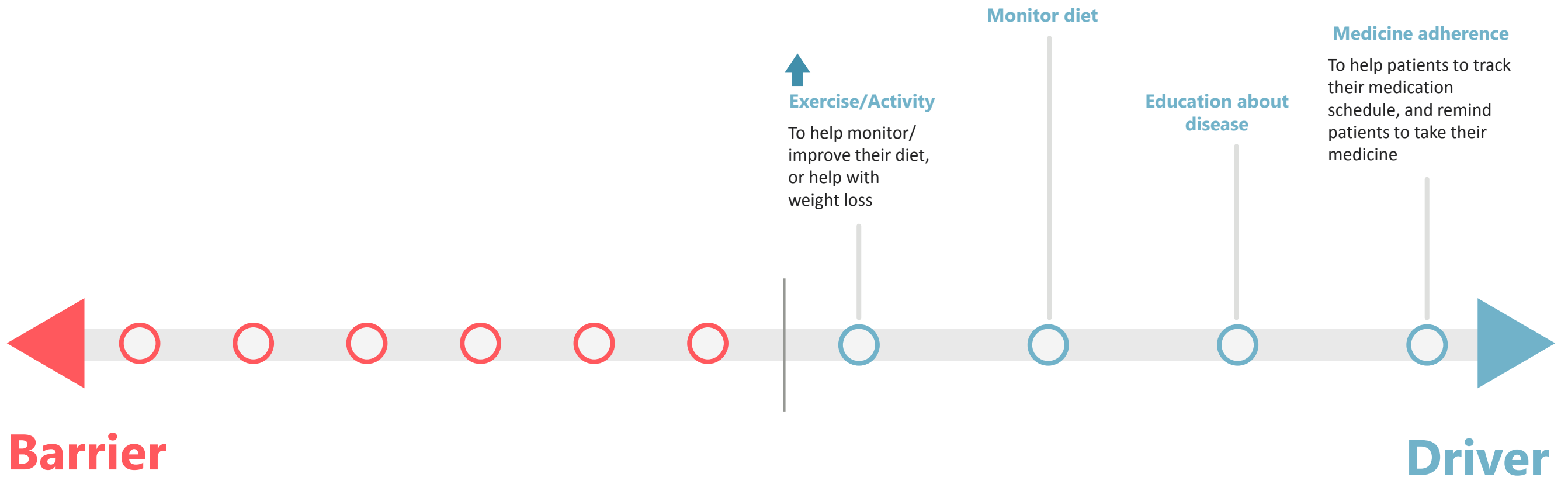
Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

PATIENT

SELF MANAGEMENT



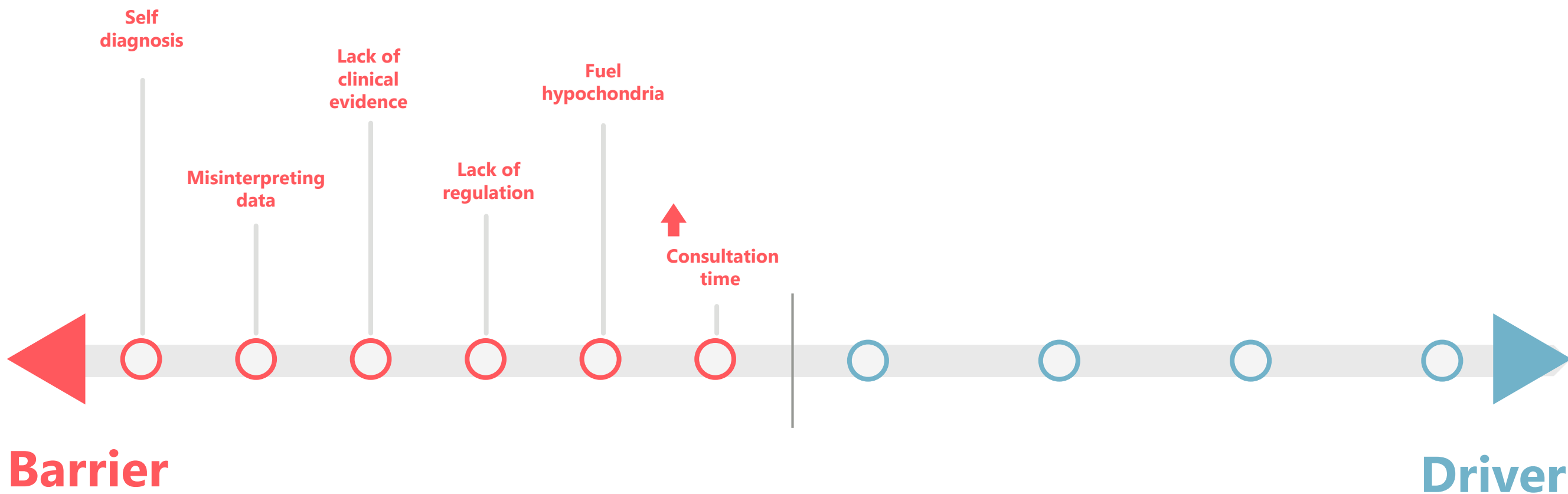
GREATEST POTENTIAL FOR CONNECTED HEALTH?



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

CONCERNS OVER USE OF CONNECTED HEALTH?



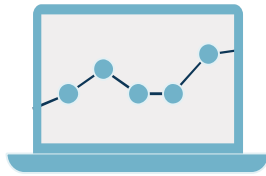
Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

GOOGLE SEARCH WAS ONCE IN THE SAME BOAT!

Consumers are online every step of the way

72%



who research initial symptoms online also research their diagnosis or treatment plan online after a doctor's visit.

31%



of consumers research symptoms online as a first step when feeling sick.

72%



who do research online after a doctor's visit say the information they find could possibly influence how they approach their treatment plan.



Ipsos Healthcare

A NEED FOR REGULATION AND GUIDELINES

**Benchmarking
product approvals**

**Personal data and
privacy protection**

Interoperability

**Consumer vs. Medical
device differentiation**



Ipsos Healthcare

Devices which support a decision (e.g. By calculating heart rate, monitoring the status of a disease or determining what/when medicine is required), will be considered medical devices.

“ ”



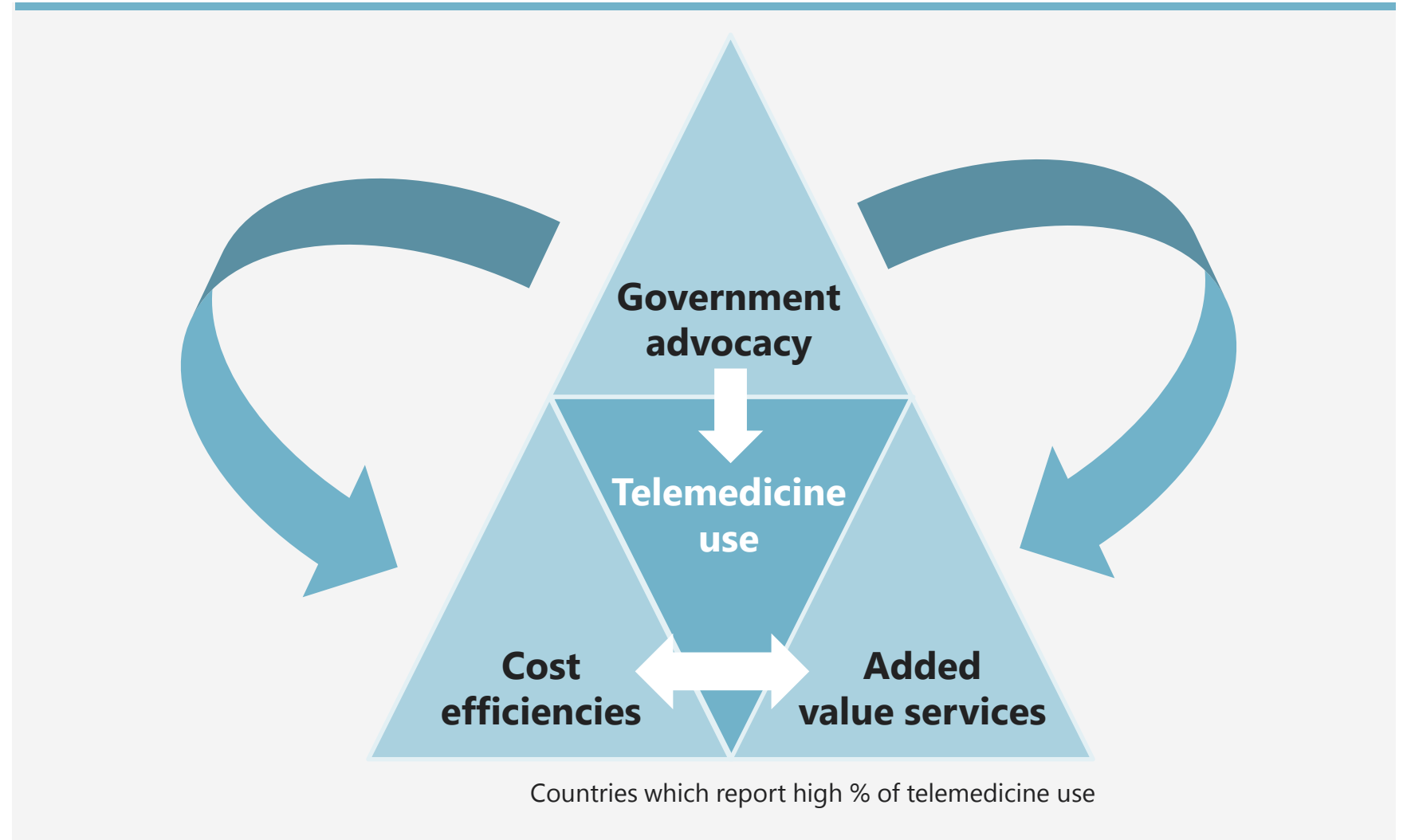
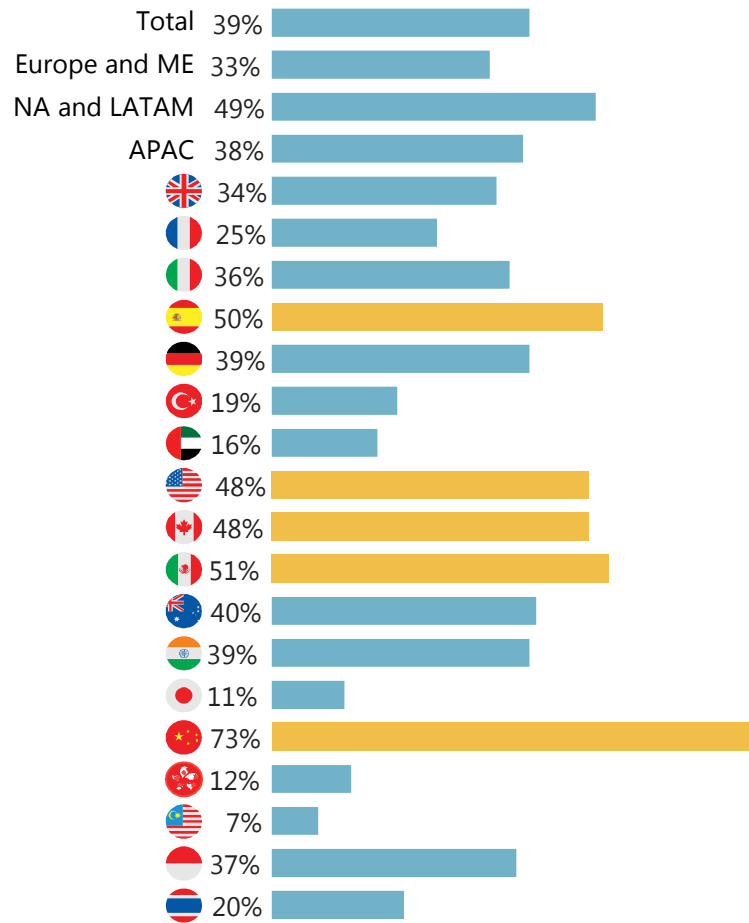
TRENDS IN TELEMEDICINE

AI & VR



TELEMEDICINE USE DRIVEN BY TOP-DOWN ADVOCACY

% Doctors used app/digital platform for telehealth



Ipsos Healthcare

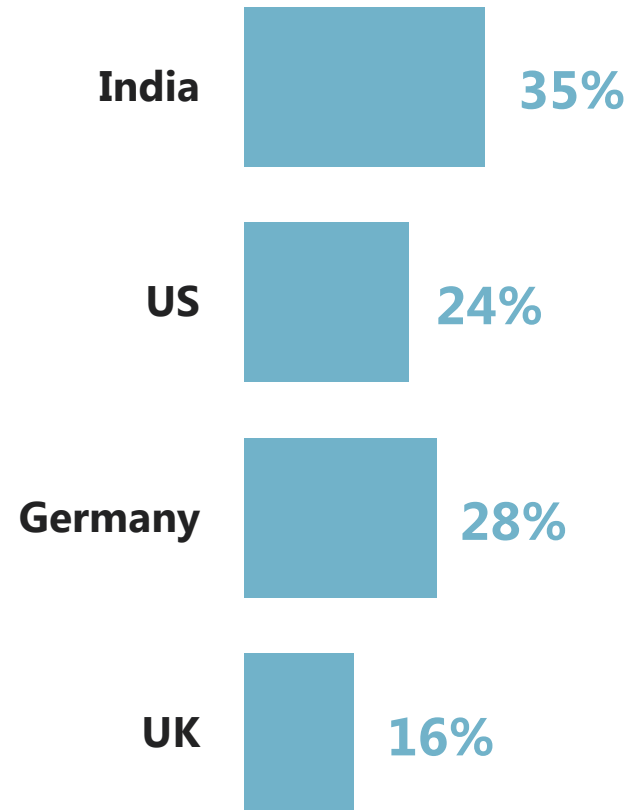
Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

ARTIFICIAL INTELLIGENCE BRINGS

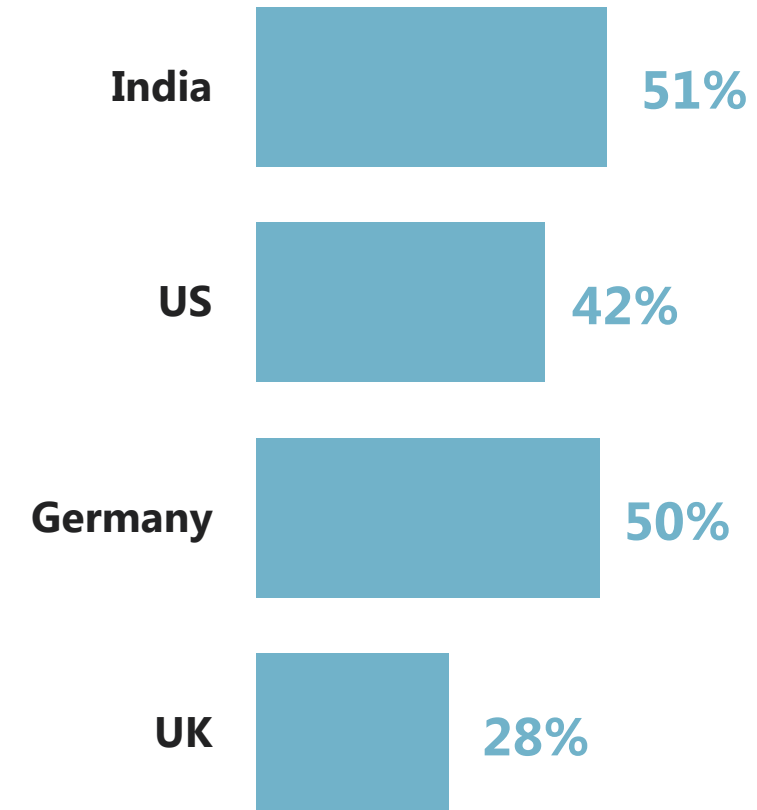
OPTIMISM (& ANXIETY!)



I am anxious about the role of artificial intelligence in the future of healthcare.



I am excited about the role of artificial intelligence in the future of healthcare.



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

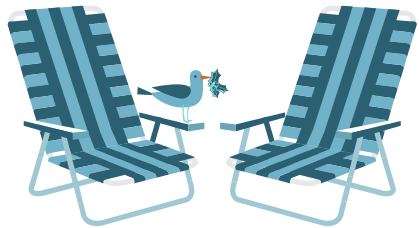
VIRTUAL REALITY FOR SIMULATION TRAINING



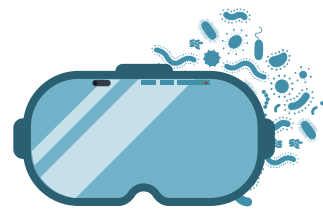
Walk in someone else's shoes to better understand the world



Experience something you wouldn't normally do (e.g. sky-diving)



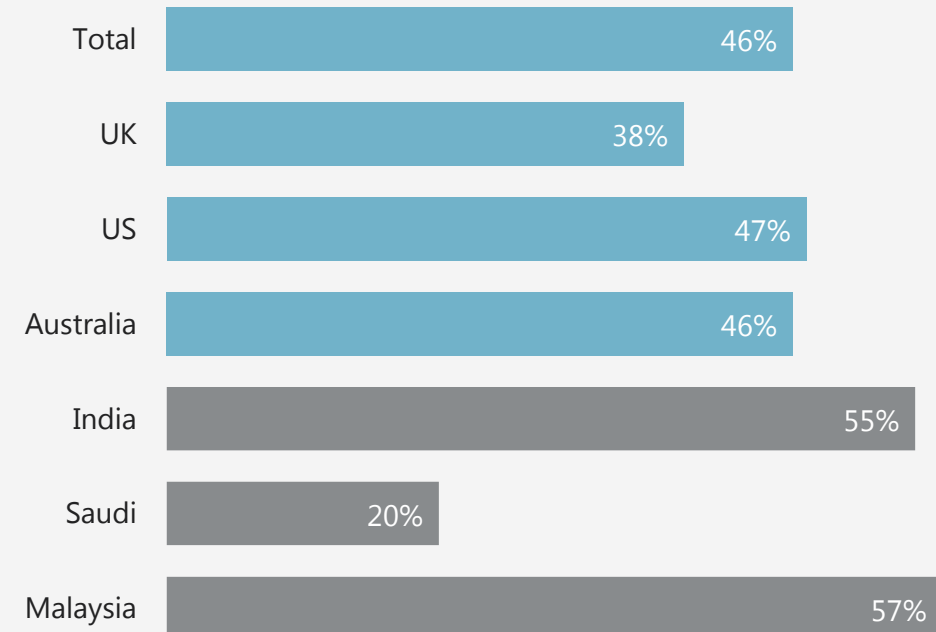
Remove all distraction, enabling focus on activities like relaxation



Learn effectively/education (e.g. become microscopic and travel through the body to learn about anatomy – like the The Body VR);

USES OF VIRTUAL REALITY (RANKED 1ST BY DOCTORS)

Simulations for training physicians

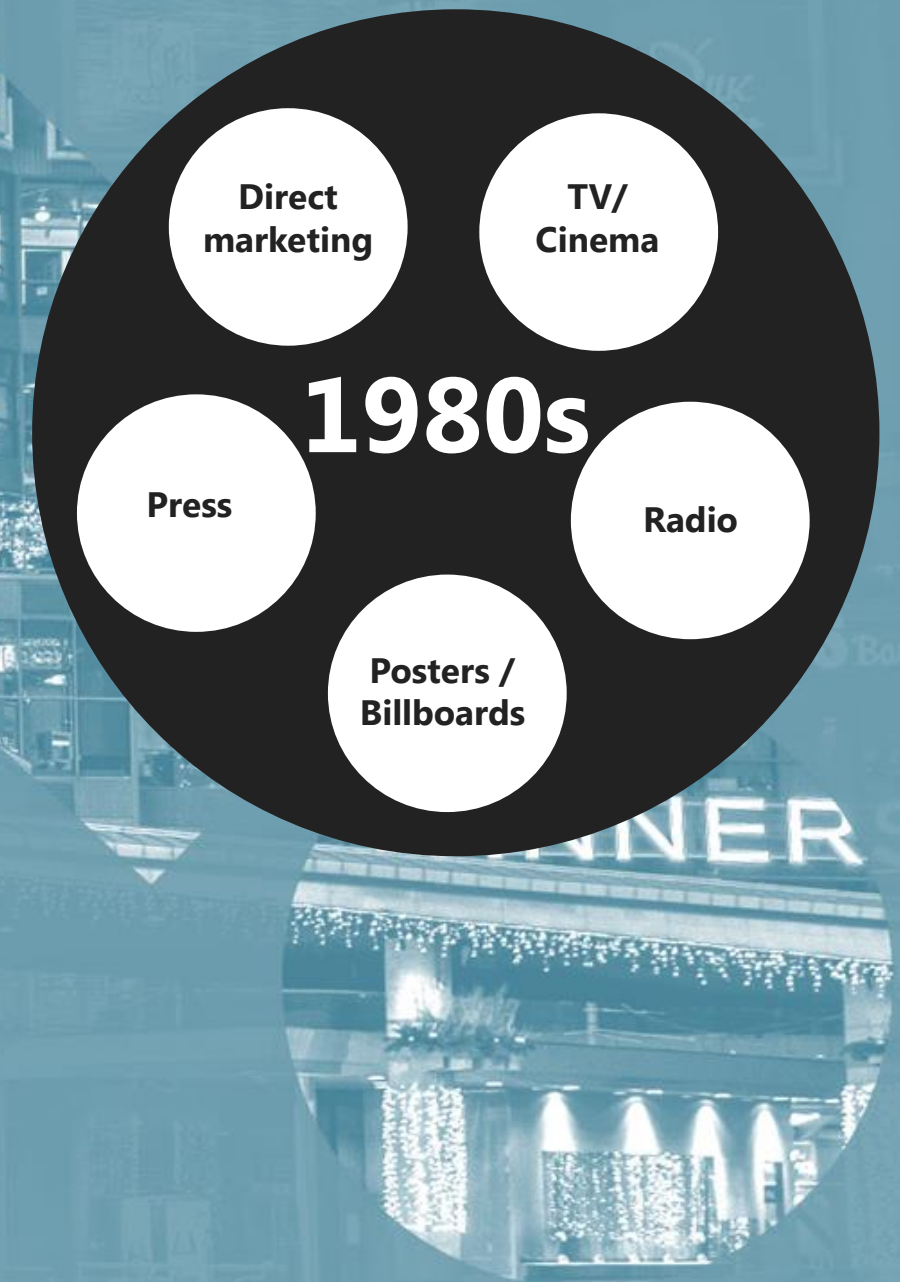


Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

DOCTOR'S DIGITAL BEHAVIOUR

The background image is a photograph of a medical professional, likely a doctor, wearing a white lab coat. They are using a stethoscope to listen to a patient's arm, which is resting on a table. The patient is wearing a dark-colored sleeve. In the foreground, on a light-colored desk, there is a silver laptop and a tablet computer. The entire image has a blue tint, and the title text is overlaid on the top left in white.

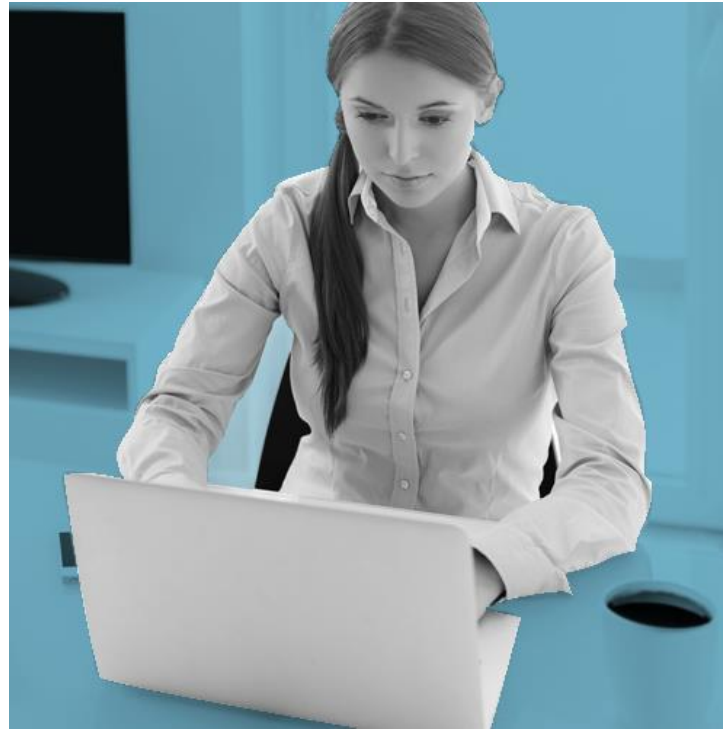


TRADITIONAL CHANNELS REIGN, DIGITAL IS GROWING

Top channels



In person meetings/events



Online study modules



**Sponsored attendance/
Conferences**



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

WHO'S MOST INNOVATIVE?



APPLE ARE GLOBAL LEADERS IN INNOVATION

Top Tech Companies



Top Pharma Companies



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

HEALTHY LONGEVITY



PERCEIVED BARRIERS TO ADOPTION BY AGE BRACKETS



18 – 24 year olds

Cost is the #1 barrier



25-40 year olds

Data privacy



41-60 year olds

Low digital literacy

60+ year olds

Low digital literacy



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries

FINAL THOUGHTS





**CONNECTED
HEALTH**
CONFERENCE

October 25-27, 2017
Seaport World Trade Center
Boston, MA

The Connected Life Journey

Shaping health and wellness for every generation

PROVIDERS. RESEARCHERS. INNOVATION LEADERS.
PHARMA/LIFESCIENCES, MEDTECH, HEALTHCARE EXECUTIVES.

www.connectedhealthconf.org
#Connect2Health

THANK

YOU

#IPSOSDIGITALDOCTOR



Patty Mechael

www.pchalliance.org

www.connectedhealthconf.org



Reena Sangar

Reena.Sangar@Ipsos.com

www.connectedhealth.ipsos.com



Ipsos Healthcare

Digital Doctor 2017 (fieldwork March -May 2017) n= 1,698 Doctors across 18 countries