

WHAT A DIFFERENCE A YEAR MAKES

Profiling the 'Digital Doctor' in 2021

By Emma Middleton, Reena Sangar and Matilda Pateraki | June 2021

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2015 was a significant year for the digitalisation of healthcare. The National Health Service in the UK launched its first digital health app library,¹ video visiting technology was being integrated into large hospital systems at scale and Apple launched its ResearchKit to integrate remote patient monitoring into clinical trials.²

A pivotal year for digital health, 2015 was also the year Ipsos initiated the very first Digital Doctor tracking survey. We were aware of the potential significance of digitisation on doctors' clinical practice and how they manage their patients, requiring a need to understand what this means from the doctors' point of view. The tracker is now in its fourth wave (2015, 2017, 2020 and 2021) and this latest wave covers 14 countries (UK, France, Germany, Italy, Spain, Brazil, USA, China, Russia, Turkey, India, Japan, Australia, South Korea).³

Six years on, in response to the Covid-19 pandemic, healthcare providers have had to shift to a virtual way of working that had never been imagined. In a short space of time, telehealth legislation allowed for remote consultations to take place for all patient types, remote monitoring became a necessity for managing many chronic conditions, and doctors discovered new barriers and benefits to virtual care. Our Digital Doctor 2021 survey provides a timely pulse on where doctors in 14 countries are today, one year into the pandemic.

HOW HAS THE PANDEMIC IMPACTED DOCTORS' VIEW OF DIGITAL HEALTH?

In general, previous surveys prior to 2020 showed slow uptake of tech such as telehealth. There was consistently a dichotomy between awareness of the potential benefits of these solutions and the significant barriers of access, infrastructure, and more ethical questions around potential patient misdiagnosis or misinformation.

As a result of Covid-19, the slow adoption of technological solutions shifted overnight. Healthcare professionals (HCPs) had to decide on which telehealth platforms to use, which systems to integrate and how to work at scale. Although the pandemic did not create the need for digital health, it certainly accelerated the trend.

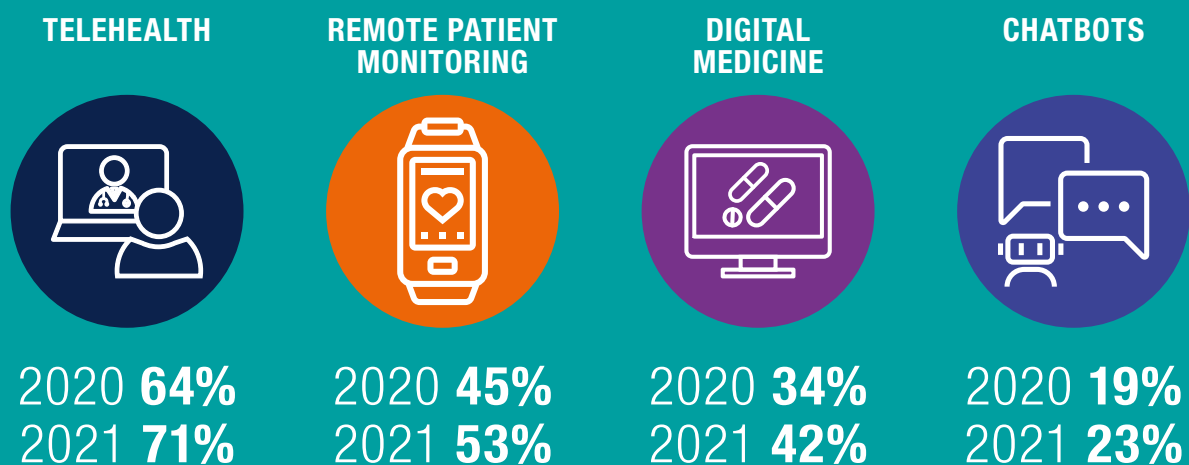
Now we see knowledge and adoption at supercharged levels, with many barriers removed or significantly reduced and new challenges taking their place. The pandemic has had major consequences for doctors with a fundamental shift to remote patient management. To what extent has this impacted how they interact with tech and how they see its potential in the future? Have doctors moved onto a different path because of the enforced changes over the last year and what signals do we foresee for a digital health future?

THE IMPORTANT DIGITAL TRENDS OF 2021

KEY HIGHLIGHTS OF DIGITAL DOCTOR 2021:

- Specific knowledge of and experience with digital health (technologies for healthcare and health related uses) has increased during a year of the pandemic
- Usage of telehealth (delivery of medical care via digital communication technologies) has taken off as the pandemic facilitates the rapid removal of previous barriers to use
- Supercharged adoption of digital channels in many markets is the result of enforced use in context of social contact restrictions

% SHOWS "I KNOW A LOT ABOUT THIS CONCEPT RELATING TO HEALTHCARE"



Source: Ipsos Digital Doctor 2021. Sample of 1,454 primary care physicians across 14 markets (UK, France, Germany, Italy, Spain, Brazil, USA, China, Russia, Turkey, India, Japan, Australia, South Korea), 20th November 2020 to 22nd February 2021. Data collected online. © Ipsos 2021, all rights reserved.

DOCTORS ARE NOW NOT JUST AWARE OF DIGITAL HEALTH SOLUTIONS BUT ARE ALSO KNOWLEDGEABLE

This year's results show how the pandemic has created a sharp hike in knowledge levels around digital health solutions, especially telehealth and remote monitoring. This is no surprise given that remote consultations are now part of everyday life and remote monitoring has come into its own for managing patients whilst not being able to physically see them. It has become a necessity for patients across a spectrum of conditions and has enabled care to continue in a safer way.

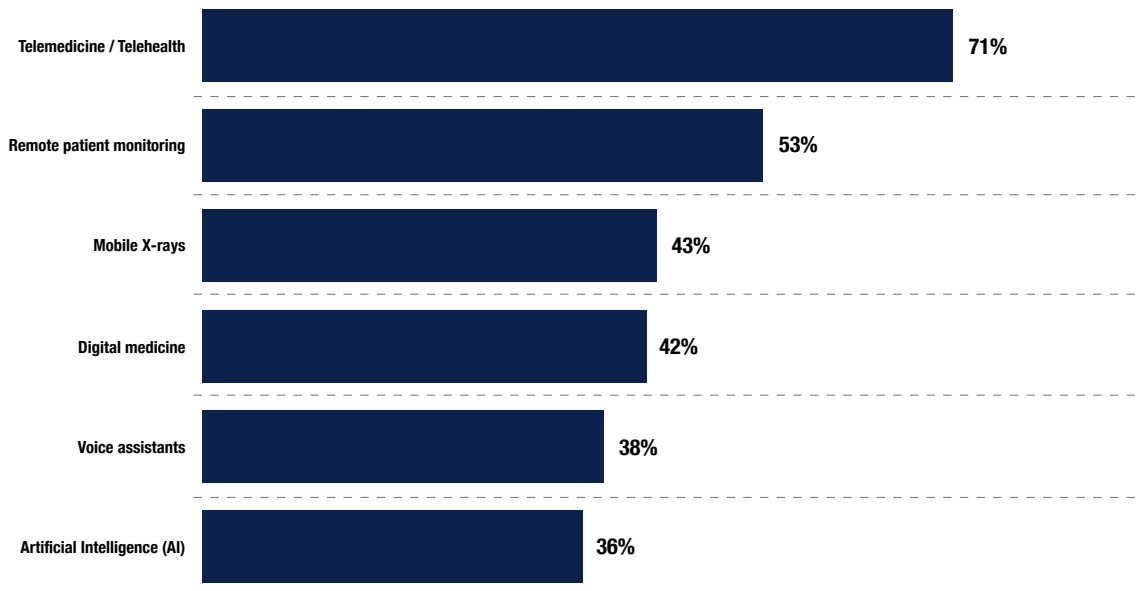
Another outlook from this data is a reminder of how much doctors have had to contend with during the pandemic, not only dealing with Covid-19 patients on the frontline but navigating new ways of working and managing (other) patients.

There has been a mass of information to absorb, new digital approaches to learn and patients to care for at a time of heightened anxiety.

Perhaps in this situation doctors have been forced to learn about these solutions on the job, and the next step is to allow doctors the time and space to educate themselves on these solutions, generate evidence on the benefits of these systems and develop best practice and guidance on how they should be employed.

Figure 1 Knowledge of digital concepts relating to healthcare has increased across all areas, but lags in less popular sectors

Q1. To what extent are you aware or not aware of the following technologies and solutions in relation to healthcare?



Source: Ipsos Digital Doctor 2021. Sample of 1,454 primary care physicians across 14 markets (UK, France, Germany, Italy, Spain, Brazil, USA, China, Russia, Turkey, India, Japan, Australia, South Korea), 20th November 2020 to 22nd February 2021. Data collected online. © Ipsos 2021, all rights reserved.

THE UNIVERSAL MOVE TOWARDS TELEHEALTH MADE SENSE FOR THE PANDEMIC. DO DOCTORS WANT IT TO STAY?

With the removal of significant barriers expressed by doctors (primary care physicians) in previous surveys, many now have experience of communicating with patients virtually. For example, in USA 70% are now using telehealth, in the UK 63% and Spain 51%.

Of those using telehealth, seven in 10 started to use it during the pandemic, and their hasty introduction may have resulted in a feeling of some lack of education on its use. Although lack of training has not been a barrier to telehealth adoption during this time, as many as 76% globally say training is important in their decision to provide telehealth now and in the future.

Looking briefly at the issue from the patient perspective, an online study conducted by Ipsos in June 2020 among 156 Multiple Sclerosis (MS) patients in EU4 and the UK showed that, for our respondents, the biggest impact of Covid-19 on their MS management was the growth of virtual consultations (45% said their appointments had taken place virtually in the last four weeks).

To better understand sentiments around virtual consultations, we further explored the issue with participants

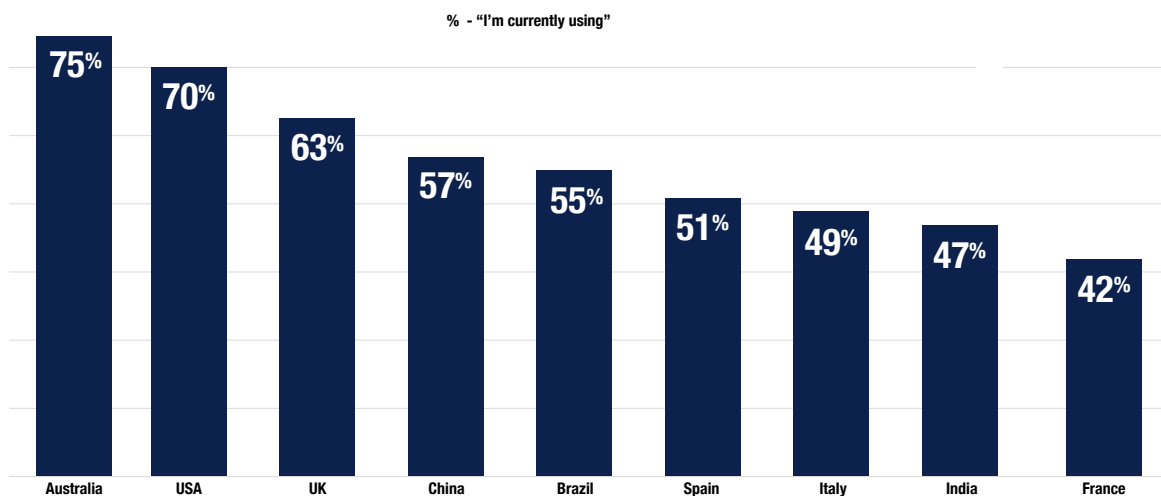
of our Syndicated MS Patient Community in October 2020 (see About the Research on page 11). Many participants expressed a level of dissatisfaction – pointing to a lack of detail and thoroughness in contrast to in-person consultations, and a negative impact on the physician-patient relationship, personalised care and treatment decision-making.

Preferences for in-person or virtual appointments in the future were mixed, however, influenced by the respondent's emotional response to the pandemic and by their level of disability. Some with more progressive MS felt that virtual appointments risked a lack of accuracy when it came to monitoring disease progression and welcomed a return to in-person consultations. Those more willing to continue with virtual appointments tended to be more anxious or fearful of the pandemic, or to feel that their MS was stable and a virtual consultation would suffice.

It would be very interesting to conduct this same research now in 2021, but this research does indicate room for improvement in virtual doctor-patient engagement.

Figure 2 Current use of telehealth has rapidly increased since last wave across markets: slight drop in usage in China

Q13a. In relation to patient care, are you currently or have you in the past practised medicine virtually via telehealth solutions (i.e. delivering care directly to patients via telehealth solutions such as apps, skype etc.), or not?



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WHAT ARE THE NEXT STEPS FOR TELEHEALTH?

Having overcome infrastructure and technical issues, doctors are now looking for guidance to give them confidence they are using it in the optimal way and for patients to be able to express themselves as they would in a face-to-face consultation. Almost one in two (44%) doctors cited one reason preventing patients using telehealth solutions is the difficulty in describing their situation. For doctors, similar to patients, there is a sense that something is missing – more holistic care and empathy – which is what really stops them providing optimal care. This is a significant area in which support and guidance is needed.

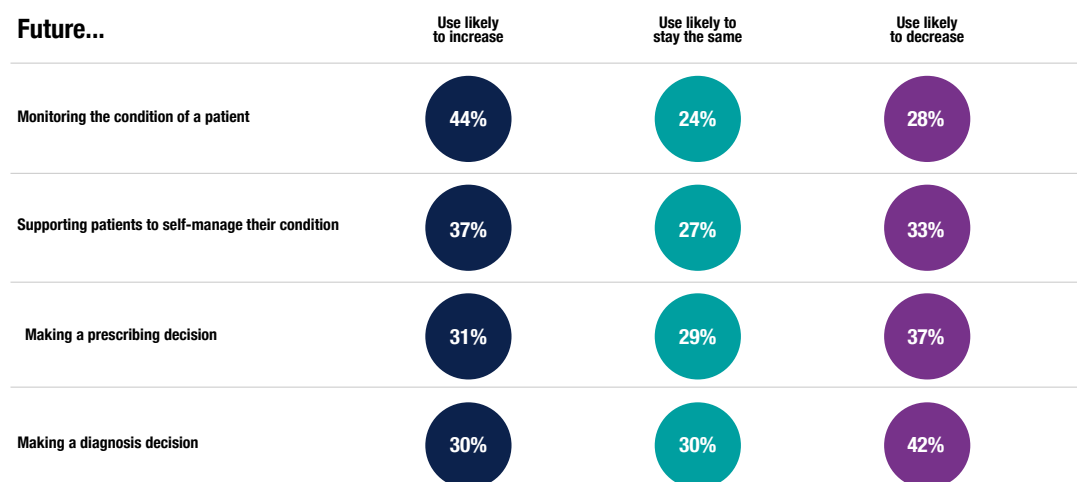
At this stage in its adoption, we need to consider telehealth as more than just a new channel for delivering care and recognise it as a fundamental shift in the patient journey and the doctor-patient relationship. Other papers from Ipsos support this view of the importance of understanding the patient-physician dynamic in any given therapy area, especially with changing channels of communication, to ensure quality engagement and optimal patient outcomes.⁴

During the pandemic, telehealth is being used in many situations, some may not continue post crisis, and some may increase. For example, where telehealth solutions have been particularly helpful during the pandemic is the ongoing monitoring of patients' conditions, and there is an expectation that regular check-ins with patients is where use of telehealth will play a greater role in the future (see Figure 3). It will be interesting to see if important stages along the patient journey such as making diagnoses and prescribing decisions (where appropriate) will become more comfortable for doctors over time via telehealth, with good education and guidance.

Considering all of this, the future looks set for telehealth to continue in some form, with 71% of doctors agreeing that remote consultations are the future.

Figure 3 Patient monitoring and supporting patients to self-manage their condition are expected to increase following the pandemic

Q13e. Are your levels of use of telehealth solutions during Covid-19 (March onwards) likely to stay the same going forward, for example when the height of the Covid-19 period has passed, or are they likely to change?



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HOW DO DOCTORS WANT TO COMMUNICATE WITH PHARMA IN THE POST PANDEMIC WORLD?

Top channels to access medical information have reversed versus last year and unsurprisingly are now predominantly digital. Online study modules (46%) and webinars (45%), virtual conferences (42%) and meetings (36%) are now cited as the most used sources for medical information.

Whereas traditionally doctors relied on peers and in-person meetings, we now see face-to-face meetings with sales reps and attendance at conference have both decreased by 17 percentage points since last year.

Doctors look to different channels for different information needs, combining both in-person and digital delivery.

Doctors across the globe are looking forward to having more in-person events and meetings with pharma companies again but virtual meetings, webinars and click-to-chat are also widely welcomed as ways to communicate information. This points to a blended future in which digital strategies complement offline channel strategies, rather than replace them.

Other digital channels which may have seemed niche a few years ago are also coming to the fore as useful sources of information. Take for example patient apps or podcasts which have low levels of usage but are regarded as very relevant for sharing medical information in today's world. Organisations such as the New England Journal of Medicine (NEJM) have embarked on this journey, sharing the latest medical news via 30 minute podcasts.

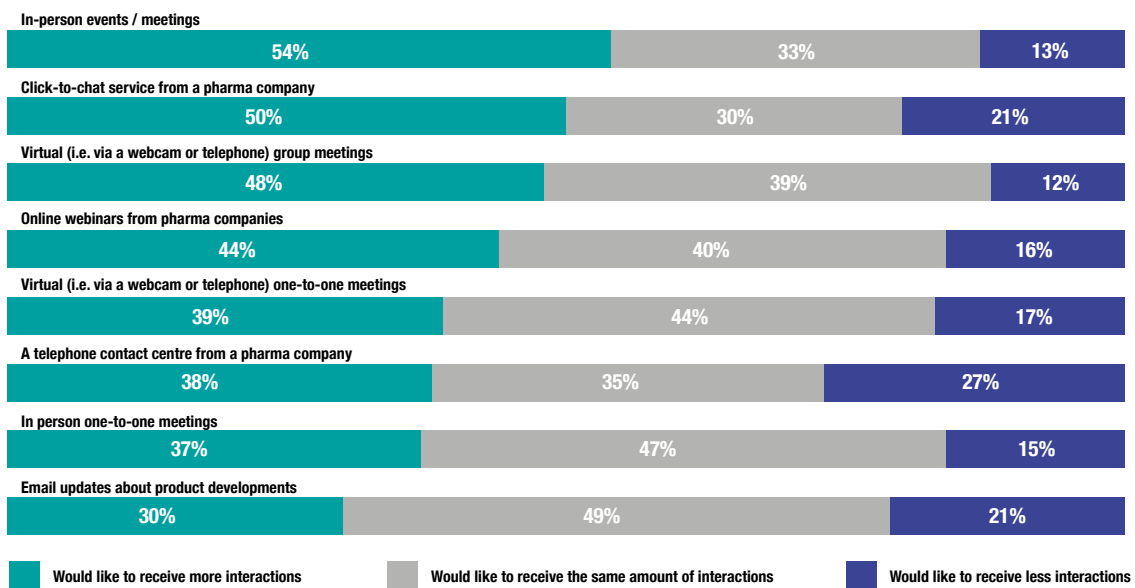
Although only around one in five doctors said they used these channels, four in five believe them to be useful, presenting an opportunity for companies to push differentiating formats and content for customers.

Interestingly, email updates and the company's website are seen as less useful. Although websites are widely used and unlikely to disappear as a means of communication, the findings highlight a need for relevant, targeted content across these more traditional digital channels. User experience plays a pivotal role here too; how engaging and easy to navigate are pharmaceutical company websites? In our research experience, doctors often struggle to find the information they need quickly and effectively. There is clearly room for improvement and the Digital Doctor data supports this sentiment.

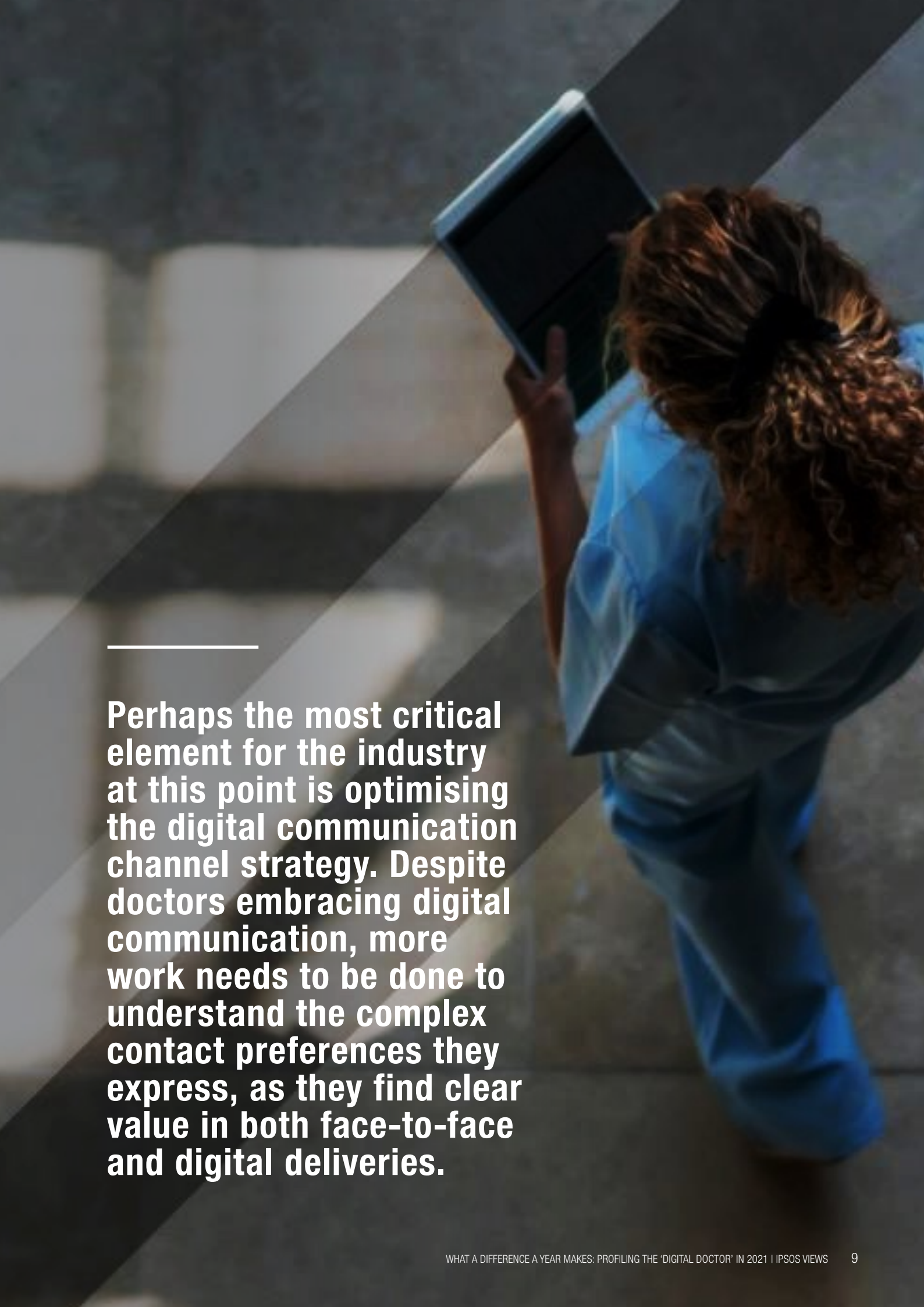
The future for our doctors will be one of a blended approach of online and offline solutions.

Figure 5 HCPs globally are looking forward to having more in-person events and meetings with pharma companies again

Q11a. Thinking about the number of current interactions you have with pharma companies via the following sources, what would be the ideal interaction volume you would like to receive from pharma companies in the future?



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A woman with curly hair, wearing blue scrubs, is seen from behind, looking at a tablet computer. The background is a blurred outdoor setting with a large diagonal shadow cast across it.

Perhaps the most critical element for the industry at this point is optimising the digital communication channel strategy. Despite doctors embracing digital communication, more work needs to be done to understand the complex contact preferences they express, as they find clear value in both face-to-face and digital deliveries.

WHAT DOES DIGITAL DOCTOR TELL US ABOUT THE FUTURE FOR TELEHEALTH AND DIGITAL CHANNEL ADOPTION?

We believe the future for our doctors will be one of a blended approach of online and offline solutions which work best for them and their patients in different situations.

It's clear some types of medicine will lend themselves more to virtual care, such as mental health, but oncology, for example, is more difficult. It is also evident that telehealth will not be going away, but the role it encompasses will be determined by strides made now, as we move towards optimisation of telehealth as an avenue of delivering care.

People-based issues are seen as some of the most significant challenges related to the adoption of telehealth by doctors as they worry about being able to provide holistic care (37%) and connecting with patients to convey empathy (29%); bridging the empathy gap and challenging misperceptions about patient suitability is key to optimising this solution. At this critical stage, after the rapid adoption of telehealth during the pandemic, more guidance is required and greater quality controls put in place to drive reassurance and optimise this approach as an avenue of delivering care.

Perhaps the most critical element for the industry at this point is optimising the digital communication channel strategy. Despite doctors embracing digital communication, more work needs to be done to understand the complex contact preferences they express, as they find clear value in both face-to-face and digital deliveries.

Mastering a true omnichannel strategy is the next stage in effective adoption of digital channels and understanding how to make the most of online and offline working together and best support HCP needs.

During this period of disruption and transformation, pharma has the opportunity to spearhead a new, proactive role in patient services (and in-home care), and demonstrate responsibility to deliver real value to truly support HCPs in their journey to digital transformative patient care.

Digital Doctor 2021 insights show us that HCP experience of digital has increased, as well as a more nuanced understanding of the challenges. We now ask ourselves, what digital habits will stay post Covid-19? What will roll back? Our prediction at Ipsos is that certain digital habits will not only remain but increase (virtual care for check ups, remote patient monitoring and use of online channels), whilst we will need more significant workflow and infrastructure changes to truly realise a fully blended healthcare future which appropriately flexes between on and offline services. The future for digital and connected health is positive, with many of us hopeful about the role technology can play to optimise healthcare and drive greater efficiencies.

The results of Digital Doctor 2021 are positive for the digital health and omnichannel industry. Doctors have the experience now of broadening their digital footprint. It is now over to the industry to make sure we do not lose the momentum and we really work hard to ensure a positive customer online experience for doctors, and appropriately think about the workflow and use-cases of virtual care and digital channels by therapy area and expertise.

About the Research: The Digital Doctor 2021 survey included a sample of 1,454 primary care physicians (doctors) across 14 countries (UK, France, Germany, Italy, Spain, Brazil, USA, China, Russia, Turkey, India, Japan, Australia, South Korea). The survey was conducted online between 20 November 2020 to 22 February 2021. An extensive report covering a broad range of topics including digital therapeutics and artificial intelligence, among others, has been developed highlighting important trends to guide industry understanding of how best to support doctors in their digital health journey.

About the Ipsos Syndicated MS Patient Community: Ipsos' Syndicated MS Patient Community is an online qualitative research community of Multiple Sclerosis patients in the EU5 who have chosen to take part in this research. Patients are recruited to ensure they are taking a range of DMTs to span the breadth of the competitive MS market, have a range of MS types and varying treatment status. Patients are Ipsos panel members, recruited and managed in-house. Data in this article were provided by 178 patients in the EU5 in October 2020. All research was conducted online.

Ipsos Digital Doctor 2021:

<https://www.ipsos.com/en/digital-doctor-2021-0>

REFERENCES

1. <https://www.digitalhealth.net/2015/03/nhs-launches-mental-health-app-library/>
2. <https://mhealthintelligence.com/news/apples-new-mhealth-project-takes-on-remote-patient-monitoring>
3. Due to Russia and Turkey being included this year, there are no trends to report in these two countries this wave
4. Bringing the patient voice to the fore
<https://www.ipsos.com/en/bringing-patient-voice-fore>

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Emma Middleton Director, Healthcare, Ipsos in the UK

Reena Sangar Head of Digital and Connected Health, Ipsos

Matilda Pateraki Research Manager, Ipsos in the UK

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