# DIGITAL DOCTOR 2023

## HEALTH TRACKER SURVEY | GLOBAL SUMMARY

**Reena Sooch**

Global Head of Digital and Connected Health

**Matilda Pateraki**

Associate Director

# Welcome to Digital Doctor 2023!

**Running since 2015, Ipsos Digital Doctor provides a comprehensive overview of digital behaviour and future trends among Doctors.**

**Including, for the first-time, speciality comparisons between the view of PCPs and paediatricians, oncologists, and neurologists.**

**Some of the key trends in 2023 include:**

1. Patient empowerment featuring at the centre of connected healthcare solutions, despite it also being seen as a threat
2. A shift in remote engagement points to a new post-pandemic “normal” for telehealth
3. Opportunities to drive adoption of Artificial Intelligence and Digital Therapeutics
4. A move to an omnichannel reality, requiring a mind shift towards a more consumer centric model
5. A drive towards a more sustainable and equitable future


**Reena Sooch**

Global Head of Digital & Connected Health

Reena.Sooch@Ipsos.com

**Matilda Pateraki**

Associate Director

Matilda.Pateraki@Ipsos.com

# 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**

# Sample & Methodology

# 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
- Paeds to recommend/ prescribe/ administer vaccines

Fieldwork took place between October 2022 – March 2023

| 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 | | | |

# Although patient empowerment is seen at the centre of connected healthcare solutions it is also seen as a threat

# A patient centric benefit is evident; HCPs realise the benefits of digital health are serving the purpose of patient empowerment

## 84%

CHDs for patients will form part of treatment plans for certain health conditions in the future

## 77%

With CHDs it feels easier for patients to understand their own health and health conditions

## 71%

With CHDs it has become easier to identify symptoms and take preventative measures

## 69%

Allows patients to have more effective conversations with their HCP/nurse

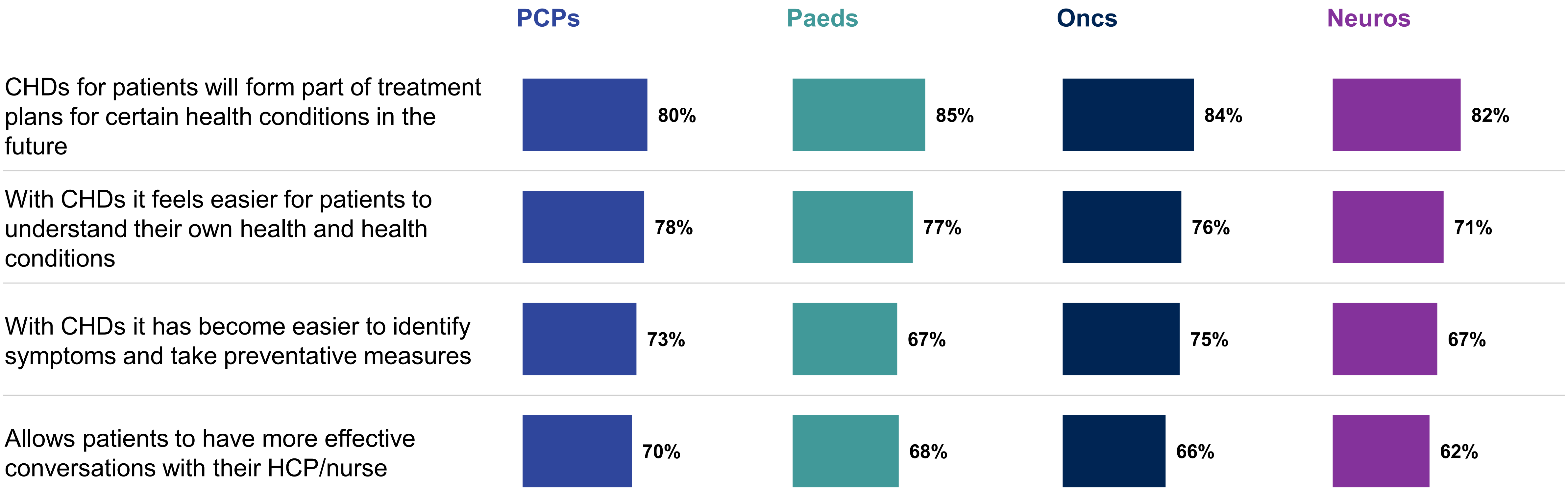
***Source:*** *Q3. On a scale of 1 to 7, where 1 is completely disagree and 7 is completely agree, please indicate the extent you agree or disagree with the following statements relating to connected health devices and digital activities. Q6. Please indicate how much you agree or disagree with the following statements in relation to outcomes of using connected health devices or tools? Q7. Now thinking about your own patients. Using the scale below, please indicate how much you agree or disagree with the following statements?*

***Base:*** *All respondents (n= 3,427)*

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

# Consensus among Specialists and Primary care on the role of digital health to drive greater patient empowerment

## Agreement with statements – Per market




*__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. Q6. Please indicate how much you agree or disagree with the following statements in relation to outcomes of using connected health devices or tools? Q7. Now thinking about your own patients. Using the scale below, please indicate how much you agree or disagree with the following statements?*

*__Base:__ All respondents (n= More details in the notes section)*

▲▼ Higher/lower than other specialty

↑/↓ Indicates statistically significant difference previous wave

# This empowerment comes at a cost with HCPs expressing concerns around patients possibly misinterpreting data or self-diagnosing with the absence of HCPs

**Two of the greatest concerns expressed amongst HCPs around using CHDs are:**

**58%**

Patients may misinterpret data

**52%**

The potential to cause patients to self-diagnose/self-manage without physician supervision

***Source:*** *Q9. What concerns, if any, do you have about the use of connected health devices and tools?*
***Base:*** *All respondents (n= 3,428)*

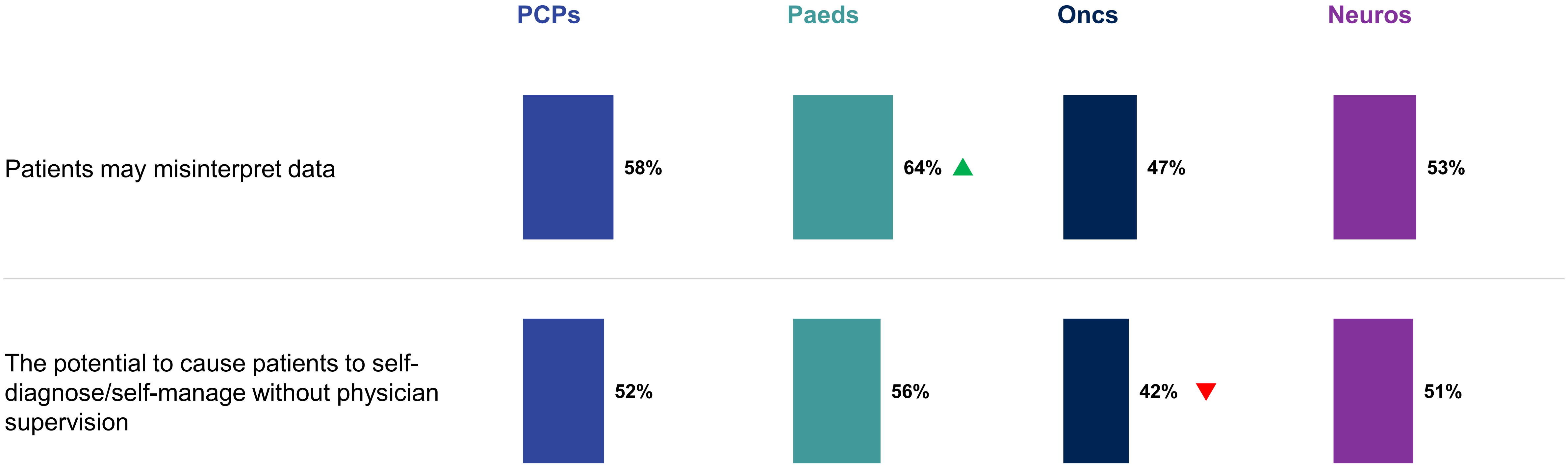
***Results shown based on % of HCPs selecting each statement***

↑/↓ Indicates statistically significant difference previous wave

# Paediatricians express a higher concern around patients misinterpreting the data compared to the other specialties; whereas Oncs are less worried about patients self-diagnosing themselves

## Top concerns – Per specialty




***Source:*** *Q9. What concerns, if any, do you have about the use of connected health devices and tools?*
***Base:*** *All respondents (n= More details in the notes section)*

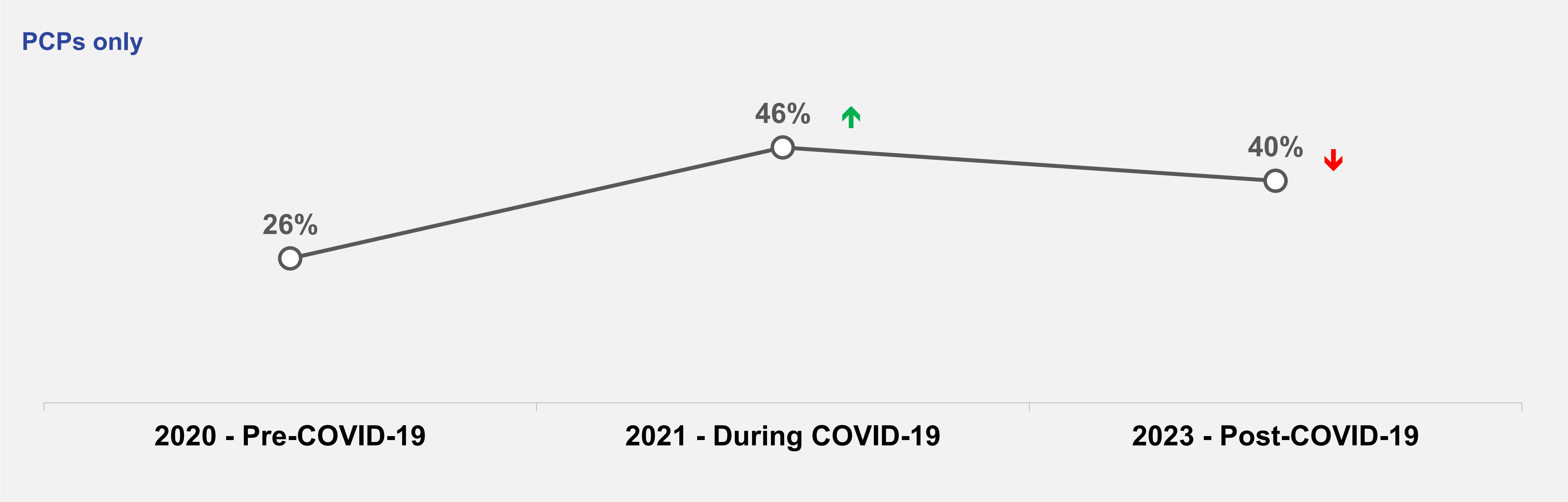
▲▼ Higher/lower than other specialty

↑/↓ Indicates statistically significant difference previous wave

# 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. This is almost double 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 previous 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%** — 1st — Ability to accurately diagnose conditions remotely

**32%** — 2nd — Quality of care HCPs are able to provide via telehealth

**31%** — 3rd — 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)*

# 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

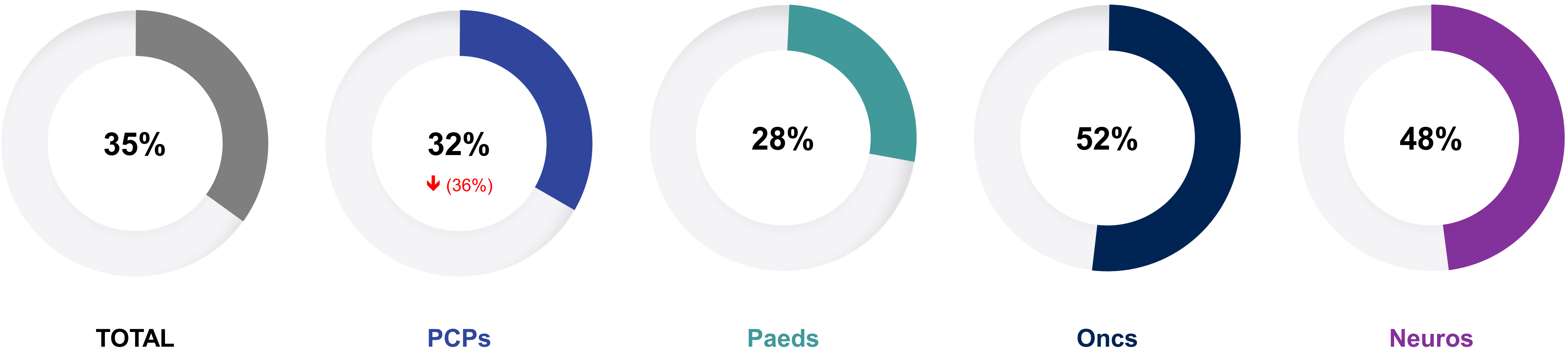
↑/↓ Indicates statistically significant difference previous wave

***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= 3,427) T3B*

# Although excitement is seen across specialties, Oncs and Neuros claim to be more knowledgeable around AI compared to PCPs & Paeds

## % 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= More details in the notes section)*

Higher/lower than other specialty

Indicates statistically significant difference previous wave

# HCPs see the benefits of AI especially around automation and more efficient & accurate diagnosis

## Benefits

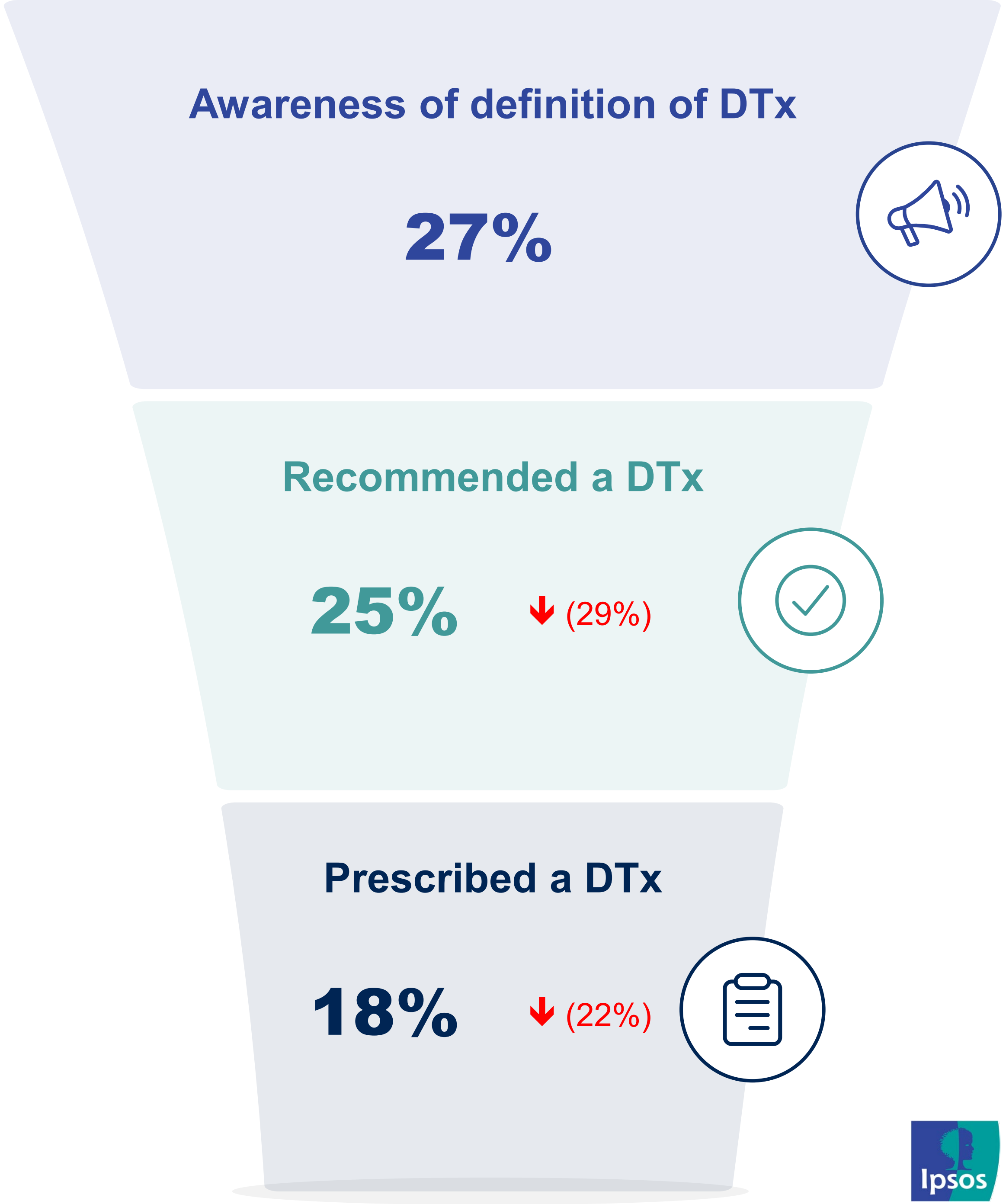
**45%**
Automates repetitive tasks

**40%**
Improves efficiency of diagnosis

**40%**
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)*

# Around a third are aware of the definition of DTx, however, recommendation and prescription levels remain low




↑/↓ Indicates statistically significant difference previous wave

***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 (T2B) – Barriers to DTx

**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

### Offline sources

Sponsored attendance at an **in-person conference**

**In person one-to-one meetings** with a pharma rep

**In-person events/ meetings** with a group of peers hosted by a pharma rep

**A telephone call** from a pharma centre providing access to non-promotional Medical Information (MI) personnel

### Online/virtual sources

**Pharmaceutical company websites**

**Non-pharmaceutical company websites**

**Online study modules** delivered via a third party for training and education purposes

**Virtual reality** applications for training and education

**Social media** content posted by KOLs

**Metaverse**

**Patient support services/ materials/apps**

**Group messaging chats** with other healthcare professionals

**Discussions online** with colleagues and others via a forum or ad board

**Click-to-chat service** from a pharma company to connect with MI personnel

**Email updates** about product developments from pharmaceutical companies

**Podcasts from an HCP** who is a leading expert in their field

**Pharmaceutical portals** which provide information and services to registered users

**Online webinars** from pharma companies

Remote web access to a **virtual conference**

**Virtual one-to-one meetings** with a pharma rep

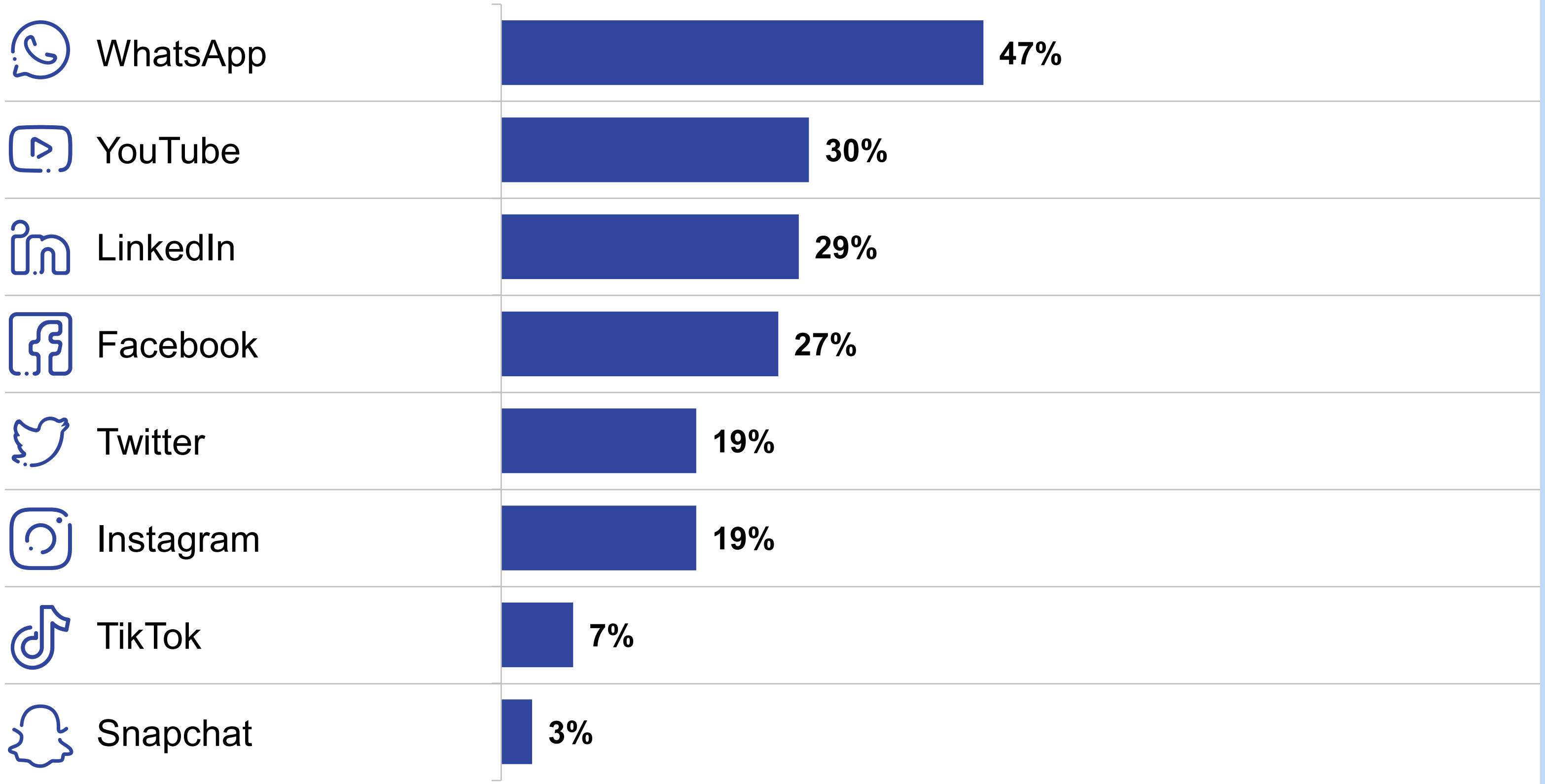
**Virtual group meetings** with a group of peers hosted by a relevant expert from a pharma company

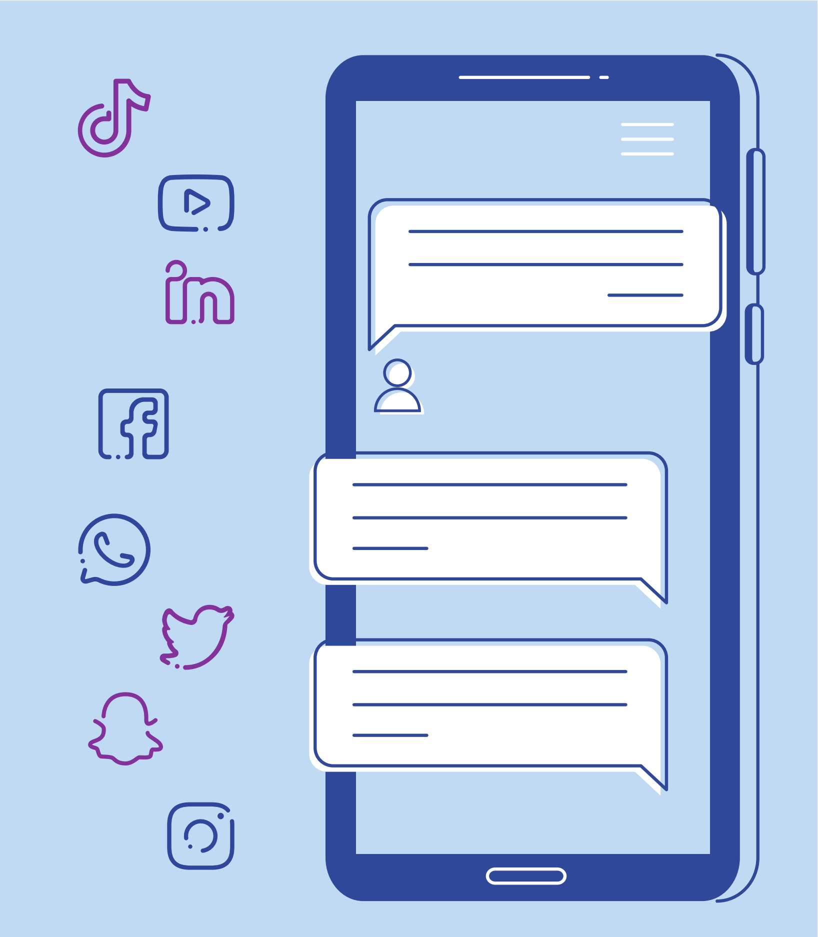
 

# An omnichannel reality is becoming evident, however, a mind shift towards a more consumer centric model is required

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

## Global usage of Social Media platforms

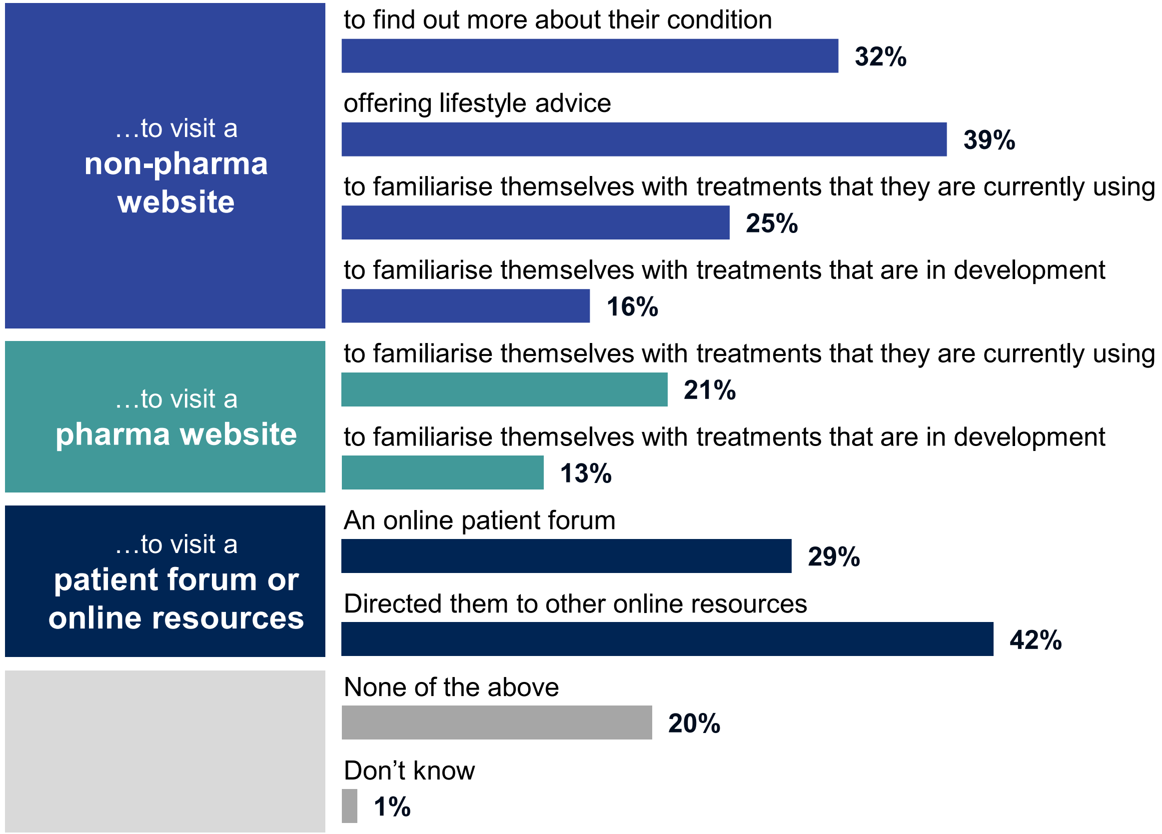


***Source:*** *Q12b. Which of the following social media platforms do you use, if any, for professional reasons?*
***Base:*** *All respondents Total (n= 3,428)*

# 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**

# Driving towards a more sustainable and equitable future

# Inability for a full assessment from HCPs and poor broad band issues from patients’ are seen as main barriers of using / accessing Telehealth

## Perceptions around remote consultations and TechQuity

**Although 72%***
agree that CHDs facilitate greater access to healthcare for patients who may not have easy access

* T3B: On a scale of 1-7, where 1 is ‘completely disagree’ and 7 is ‘completely agree’

**The main barriers for patients according to HCPs is health & tech literacy / access:**

**44%:** Difficulty describing their situation accurately

**44%:** Poor broad band issues ↓ (47%)

**40%:** Patients don’t always have the right equipment to participate ↓ (48%)

***Source:*** *Q6. Please indicate how much you agree or disagree with the following statements in relation to outcomes of using connected health devices or tools? Q13h. What are or could be the barriers, if any, that would prevent patients using telehealth solutions?*
***Base:*** *All respondents (n= 3,428)*

↑/↓ Indicates statistically significant difference previous wave

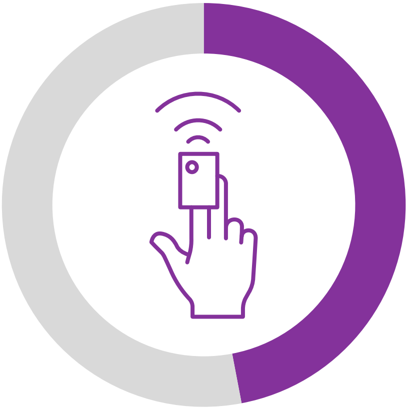
# When thinking about the future of in-home healthcare, HCPs are more positive about in-home self monitoring tools versus in-home virtual wards

## Agreement with statements (Top 3 Box)

**In-home self-monitoring**
tools are the future of healthcare

**71%**

**In-home virtual-wards**
are the future of healthcare



**47%**

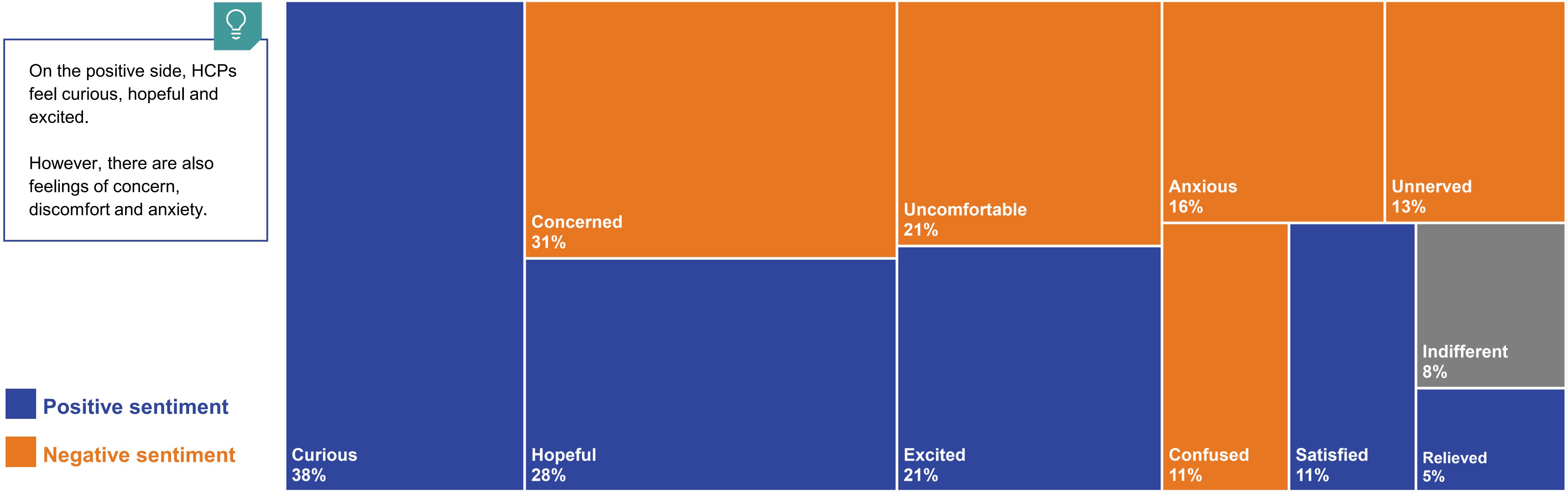
*Source: Q3. On a scale of 1 to 7, where 1 is completely disagree and 7 is completely agree, please indicate the extent you agree or disagree with the following statements relating to connected health devices and digital activities.*
*Base: W3'23: All respondents (n=3,428)*

# Feelings (positive vs. negative) are evenly balanced about the entrance of tech companies into the digital and connected health field

## When I think about the entrance of tech companies into the digital and connected health field I am…

On the positive side, HCPs feel curious, hopeful and excited.

However, there are also feelings of concern, discomfort and anxiety.

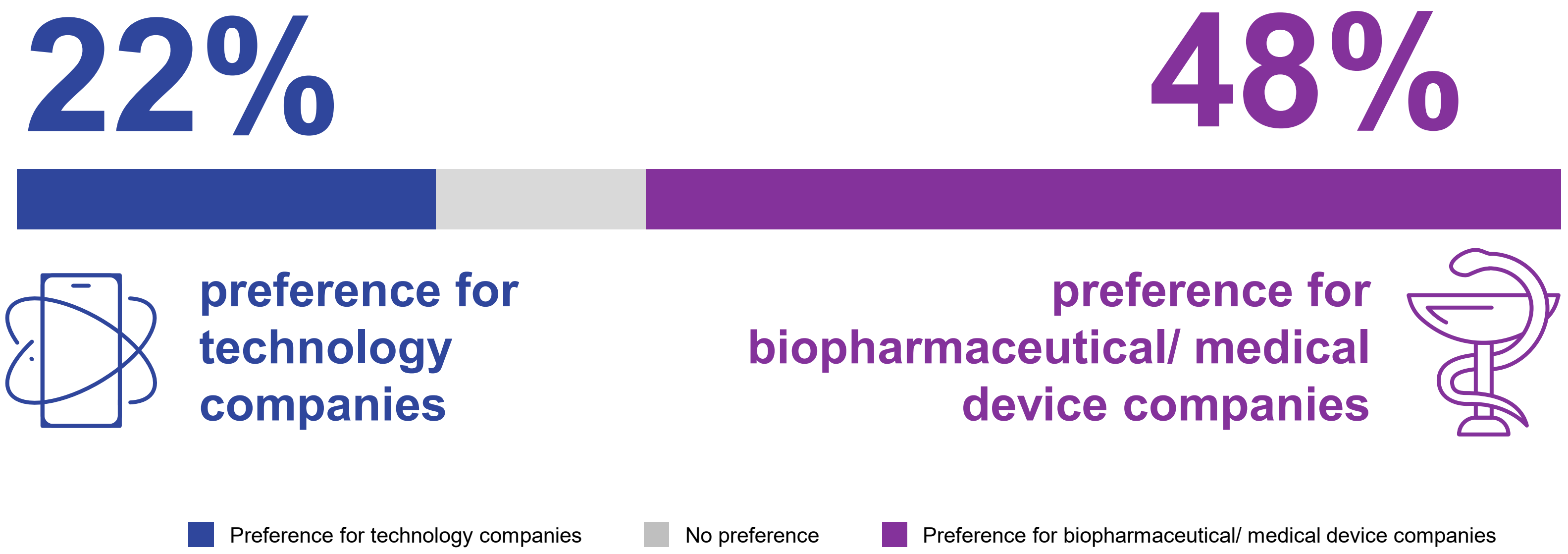



*Q9c. How do you feel about the entrance of tech companies like Amazon, Google etc. into the digital and connected health field?*
*Base: W3'23: All respondents (n=3,428)*

Overall:
- 62% of HCPs express at least one **positive**
- 54% of HCPs express at least one **negative**

# HCPs have a stronger preference for biopharma/ medical device companies to develop digital and CHDs versus technology companies

## Preference of technology over biopharma companies




*Q9b. Please answer on the scale below if you would prefer digital and connected health devices developed by technology companies or biopharmaceutical/ medical device companies. Base: W3'23: All respondents (n=3,428)*

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**Ipsos's standards & accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Moreover, our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.**

**ISO 20252** – is the international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos UK was the first company in the world to gain this accreditation.

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# Contact us:

**Matilda Pateraki**

Associate Director

Matilda.Pateraki@Ipsos.com