DIGITAL DOCTOR 2023

HEALTH TRACKER SURVEY | GLOBAL SUMMARY

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

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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
- 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

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

Agreement with statements (Top 2 Box*)

77%

Agree that with Connected Health Devices (CHDs) it feels easier for patients to understand their own health and health conditions

71%

Agree that with CHDs it has become easier to identify symptoms and take preventative measures

69%

Agree that CHDs allow patients to have more effective conversations with their HCP/nurse

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? 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= 3,428)*

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

Consensus among Specialists and PCPs on the role of digital health to drive greater patient empowerment

Agreement with statements (Top 2 Box*) – Per specialty

	PCPs	Paeds	Oncs	Neuros
With CHDs it feels easier for patients to understand their own health and health conditions	78%	77%	76%	71%
With CHDs it has become easier to identify symptoms and take preventative measures	73%	67%	75%	67%
Allows patients to have more effective conversations with their HCP/nurse	70%	68%	66%	62%

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? 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= Total (n=3428), PCPs (n=1852), Paeds (n=855), Oncologists (n=361), Neurologists (n=360)*

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

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%

Believe patients may misinterpret data

52%

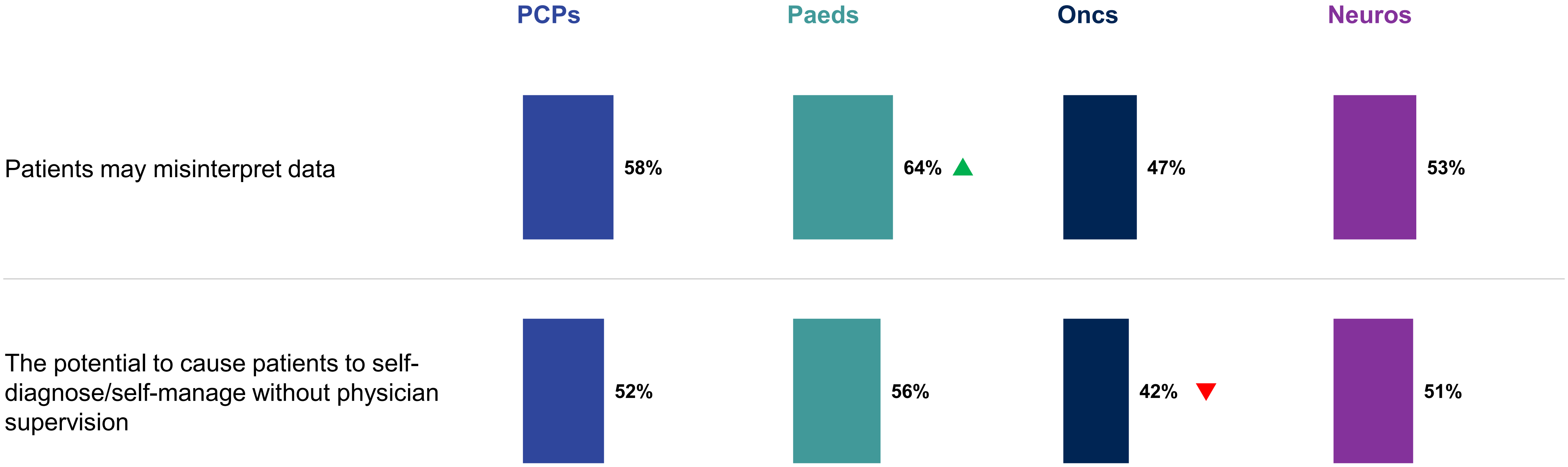
Are worried about the potential to cause patients to self-diagnose/self-manage without physician supervision

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*

Paediatricians express a higher concern around patients misinterpreting the data compared to the other specialties; whereas Oncologists 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= Total (n=3428), PCPs (n=1852), Paeds (n=855), Oncologists (n=361), Neurologists (n=360)*

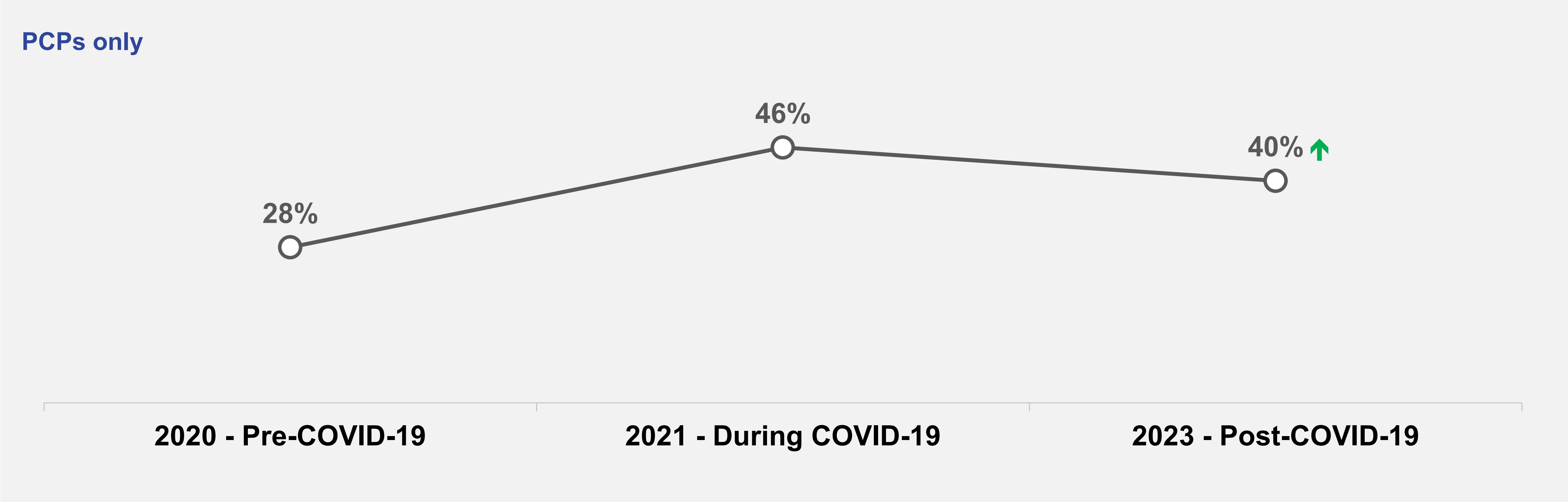
▲▼ Higher/lower than other specialty

Results shown based on % of HCPs selecting each statement

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

46%

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

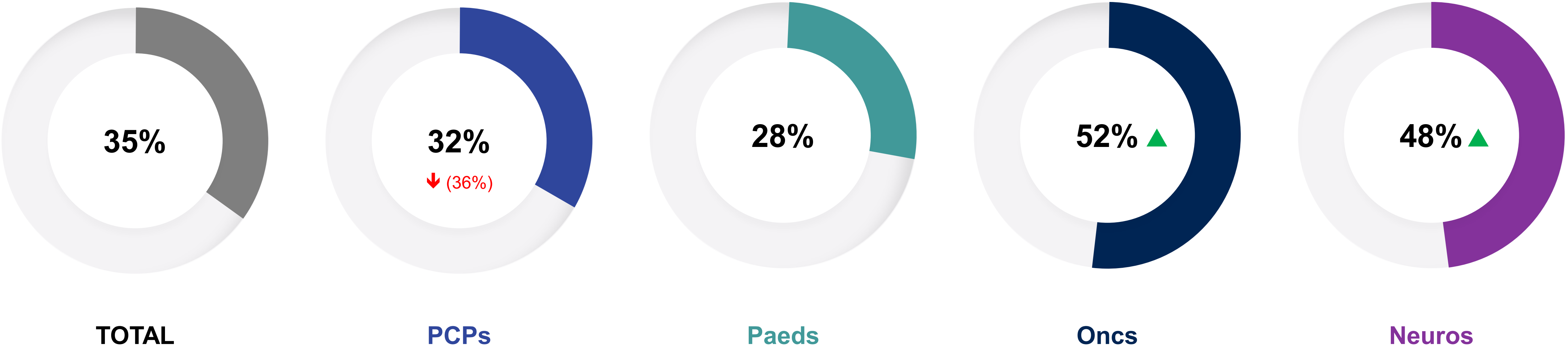
*Top 2 Box: On a scale of 1-7, where 1 is ‘completely disagree’ and 7 is ‘completely agree

***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

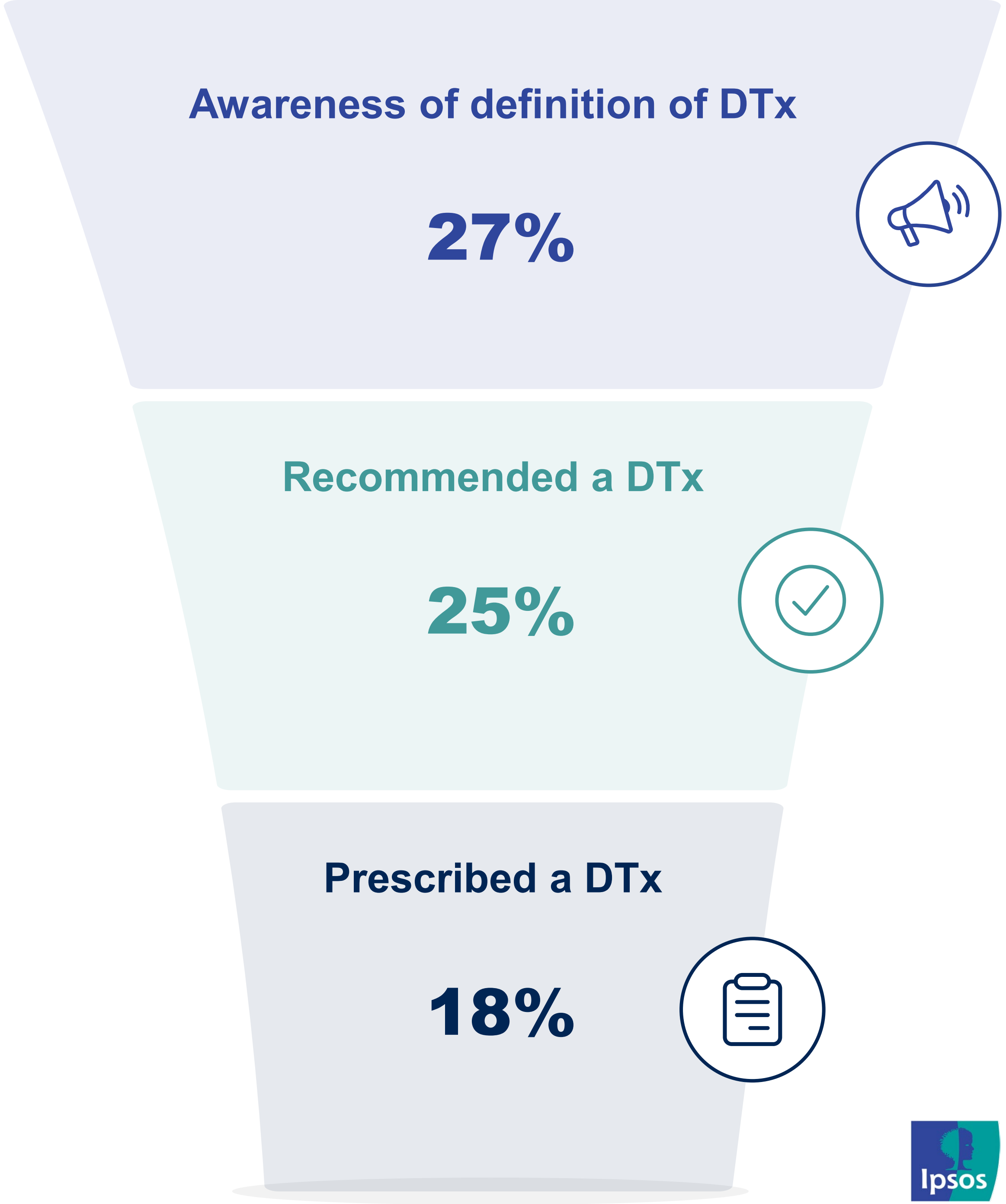
40%
Believe AI improves efficiency of diagnosis

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

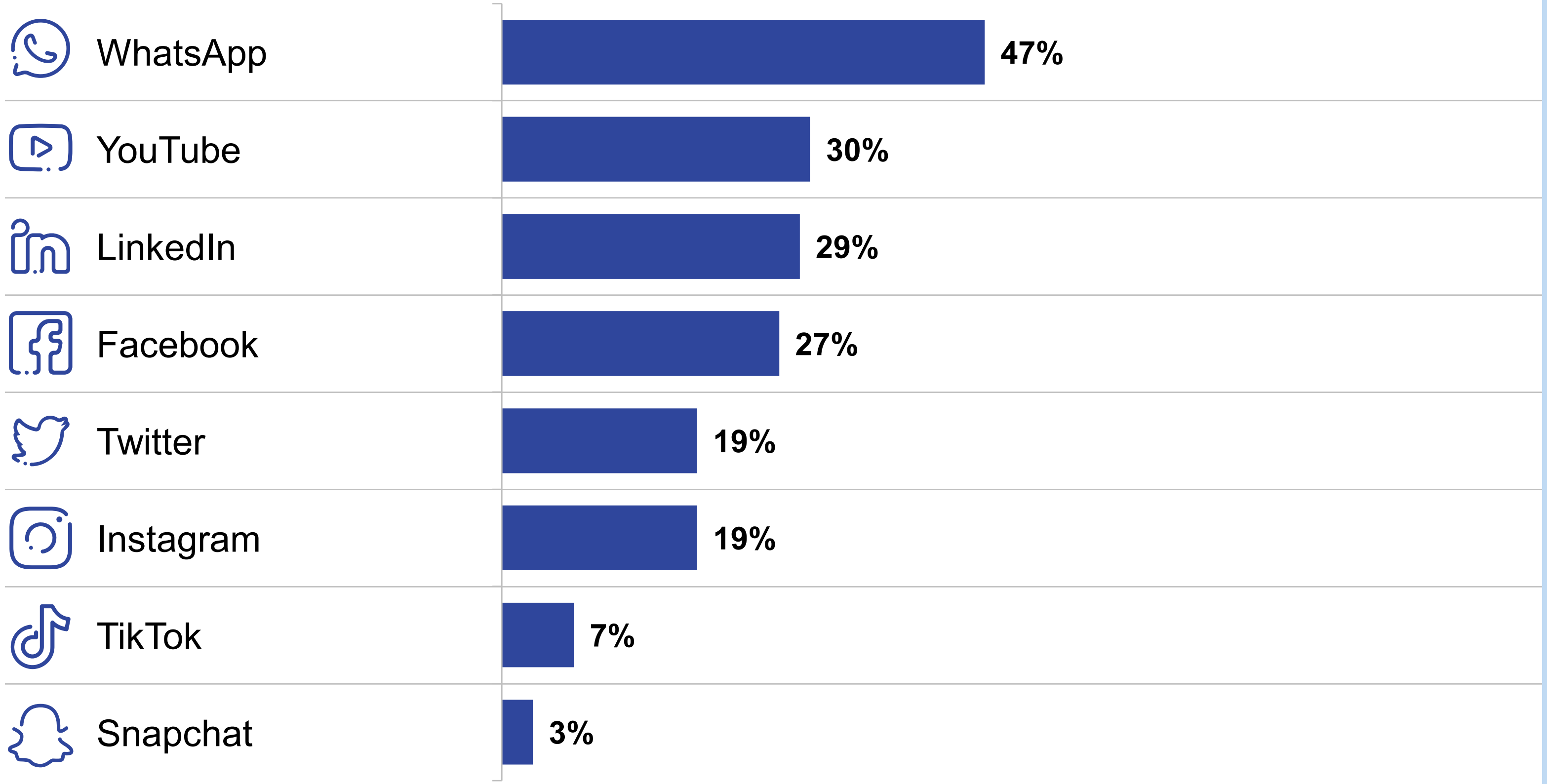
Offline sources	Online/virtual sources				
Sponsored attendance at an **in-person conference**	**Pharmaceutical company websites**	**Virtual reality** applications for training and education	**Group messaging chats** with other healthcare professionals	**Email updates** about product developments from pharmaceutical companies	**Online webinars** from pharma companies
In person one-to-one meetings with a pharma rep	**Non-pharmaceutical company websites**	**Social media** content posted by KOLs	**Discussions online** with colleagues and others via a forum or ad board	**Podcasts from an HCP** who is a leading expert in their field	Remote web access to a **virtual conference**
In-person events/ meetings with a group of peers hosted by a pharma rep	**Online study modules** delivered via a third party for training and education purposes	**Metaverse**	**Click-to-chat service** from a pharma company to connect with MI personnel	**Pharmaceutical portals** which provide information and services to registered users	**Virtual one-to-one meetings** with a pharma rep
A telephone call from a pharma centre providing access to non-promotional Medical Information (MI) personnel		**Patient support services/ materials/apps**			**Virtual group meetings** with a group of peers hosted by a relevant expert from a pharma company

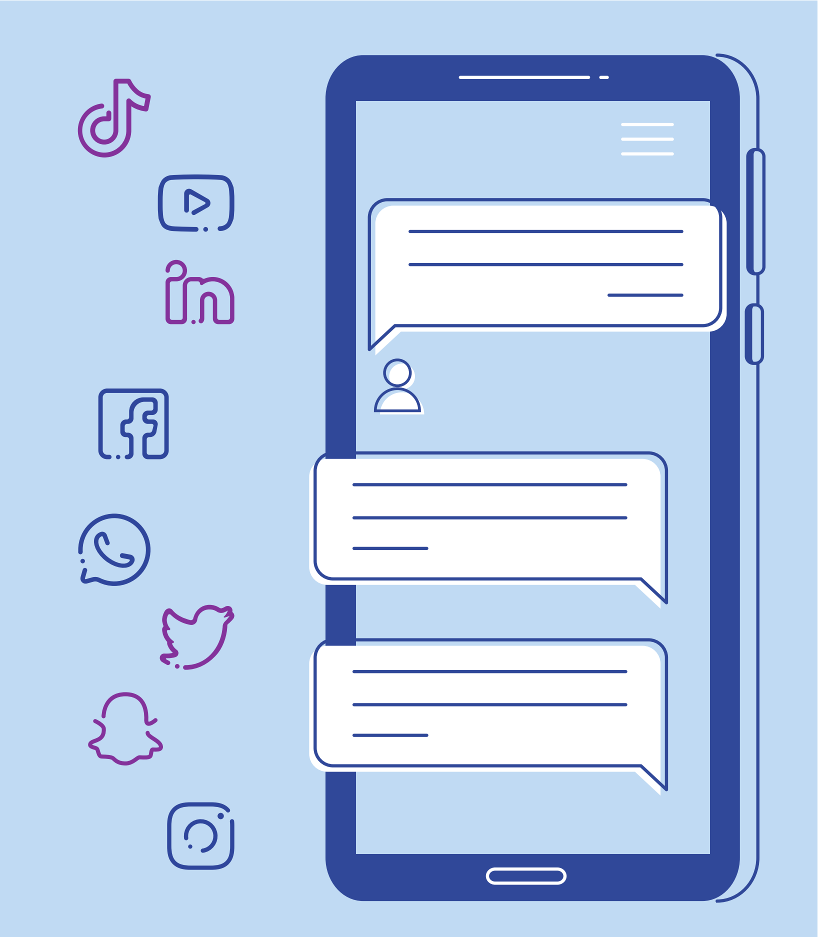
Source: *Q10. Which of the following sources of information, if any, have you used in the last 3 months to obtain medical information to support your everyday clinical practice?*
Base: *All respondents (n= 3,428)*

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



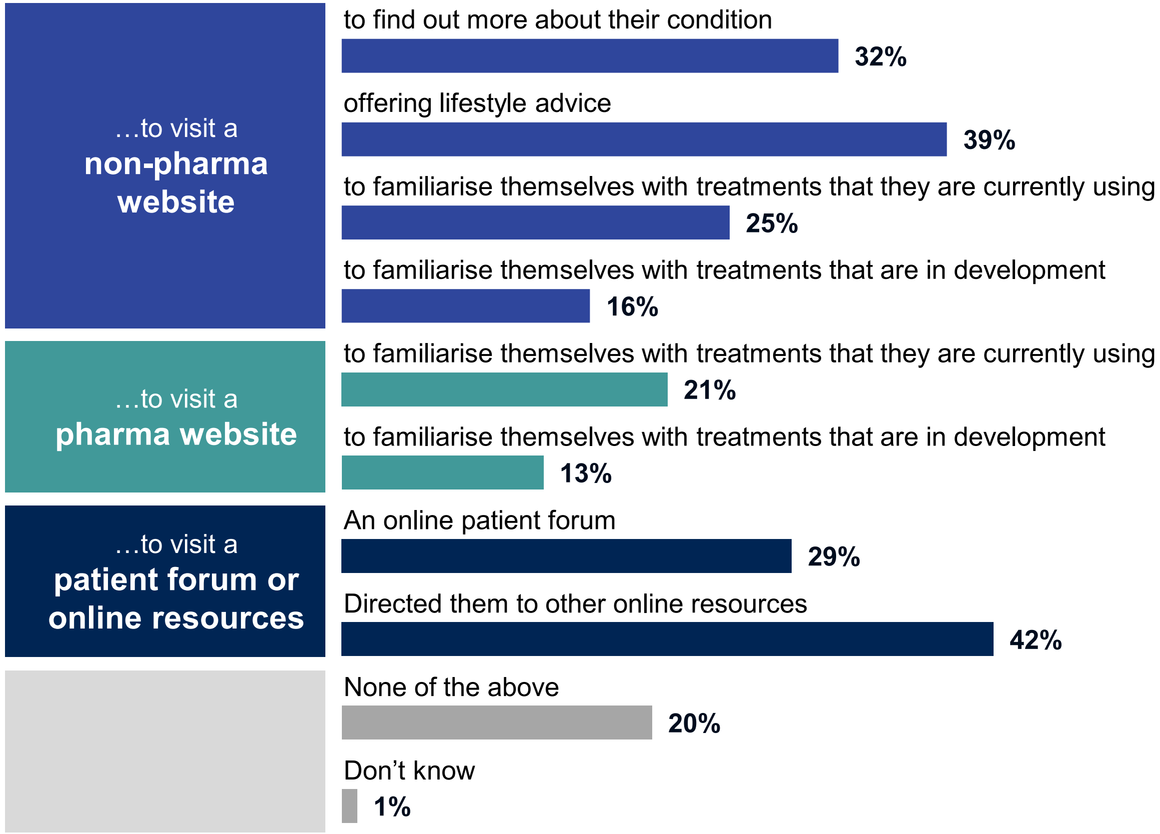


Source: *Q12b. Which of the following social media platforms do you use, if any, for professional reasons?*
Base: *All respondents Total (n= 3,428)*

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*

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

Driving towards a more sustainable and equitable future

Inability for a full assessment from HCPs and poor broadband 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

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

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

44% believe patients have difficulty describing their situation accurately

44% believe patients have poor broadband issues

40% believe patients don't always have the right equipment to participate

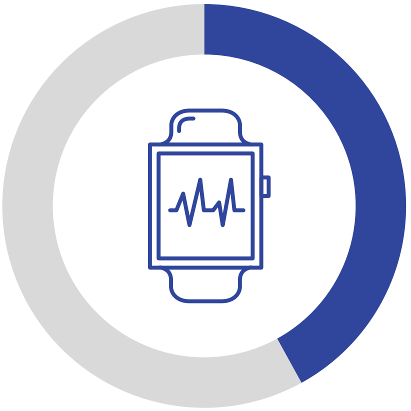
***Results shown based on % of HCPs selecting each statement*

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)*

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

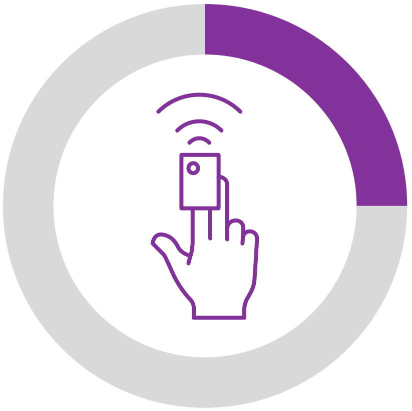
Agreement with statements (Top 2 Box*)

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

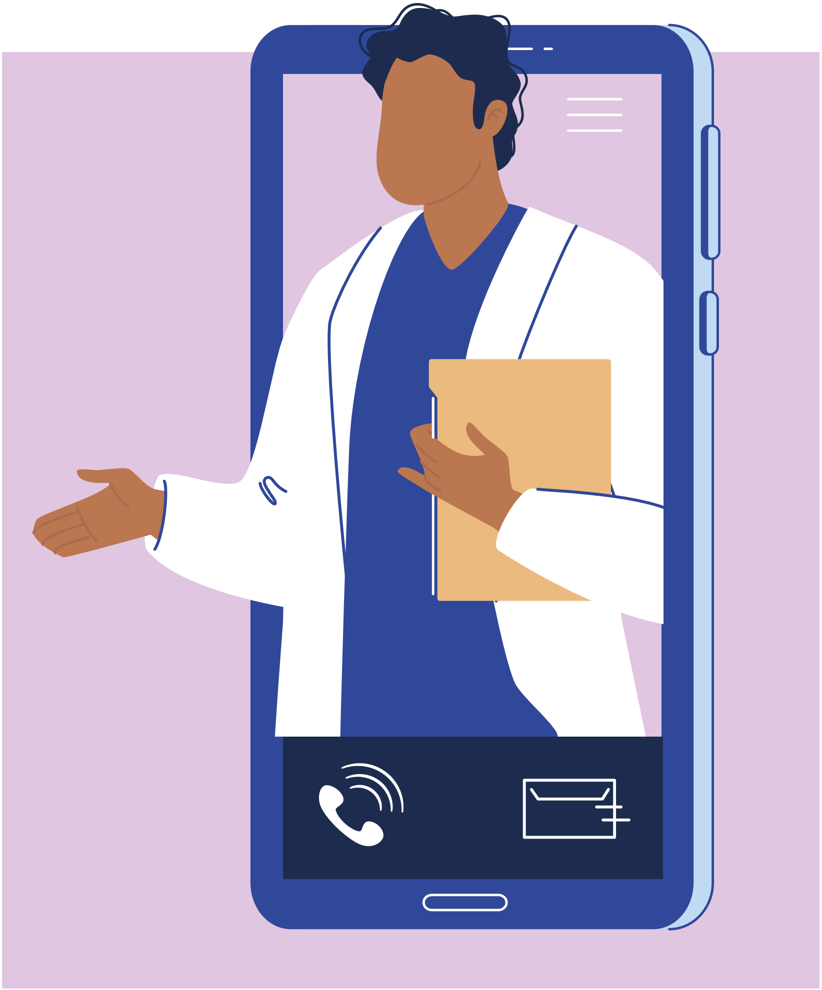


42%

In-home virtual-wards
are the future of healthcare



25%



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)

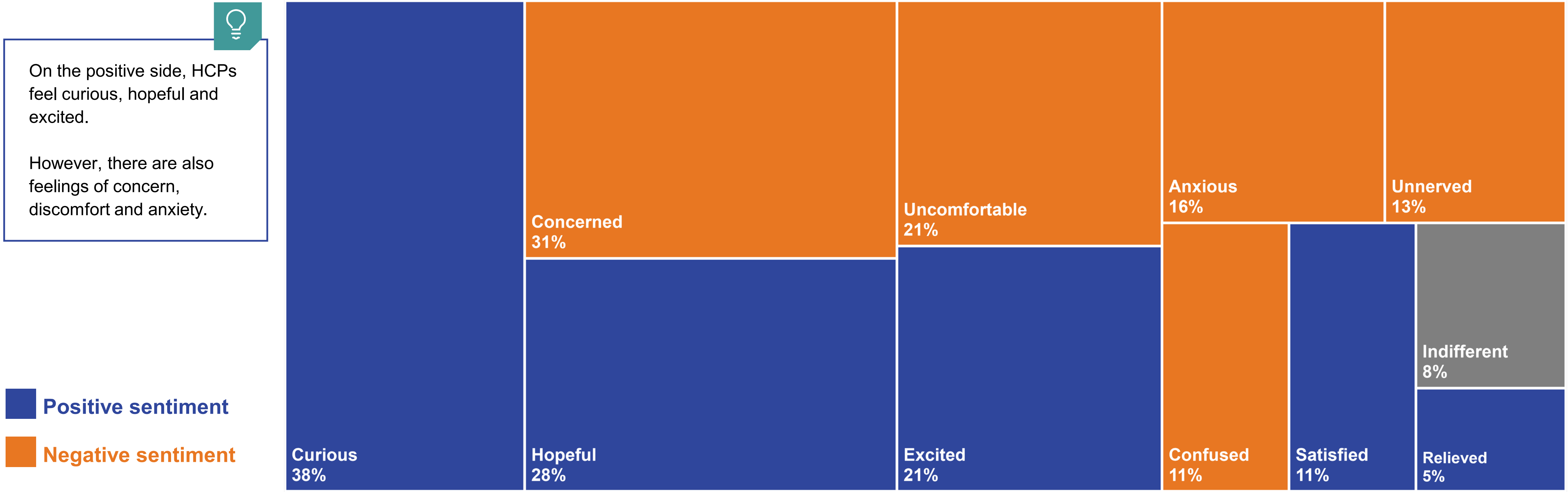
***Results shown based on Top 2 Box:** (1-7 on a scale, where 1 is 'completely disagree' and 7 is 'completely agree')*

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.



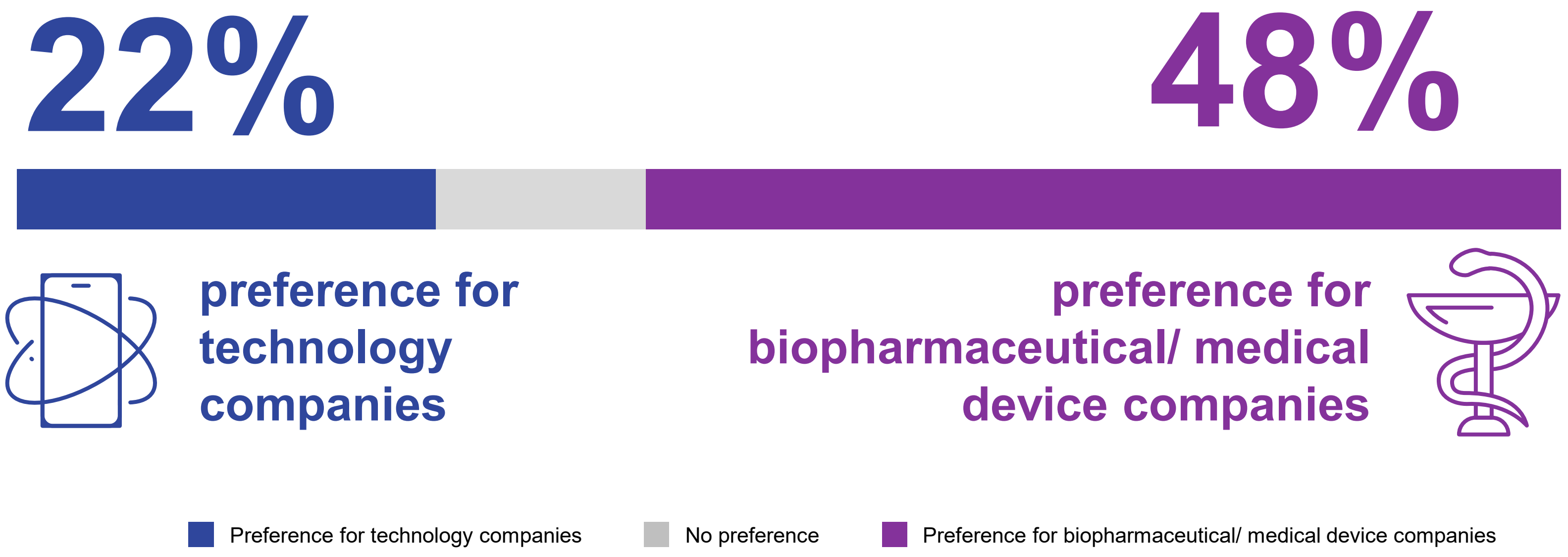
Overall:
- 62% of HCPs express at least one **positive**
- 54% of HCPs express at least one **negative**

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)

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

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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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.

MRS Company Partnership – By being an MRS Company Partner, Ipsos UK endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self regulation of the MRS Code; more than 350 companies have followed our lead.

ISO 9001 – International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.

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This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos UK Terms and Conditions

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