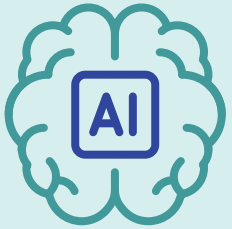# DIGITAL DOCTOR 2023

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

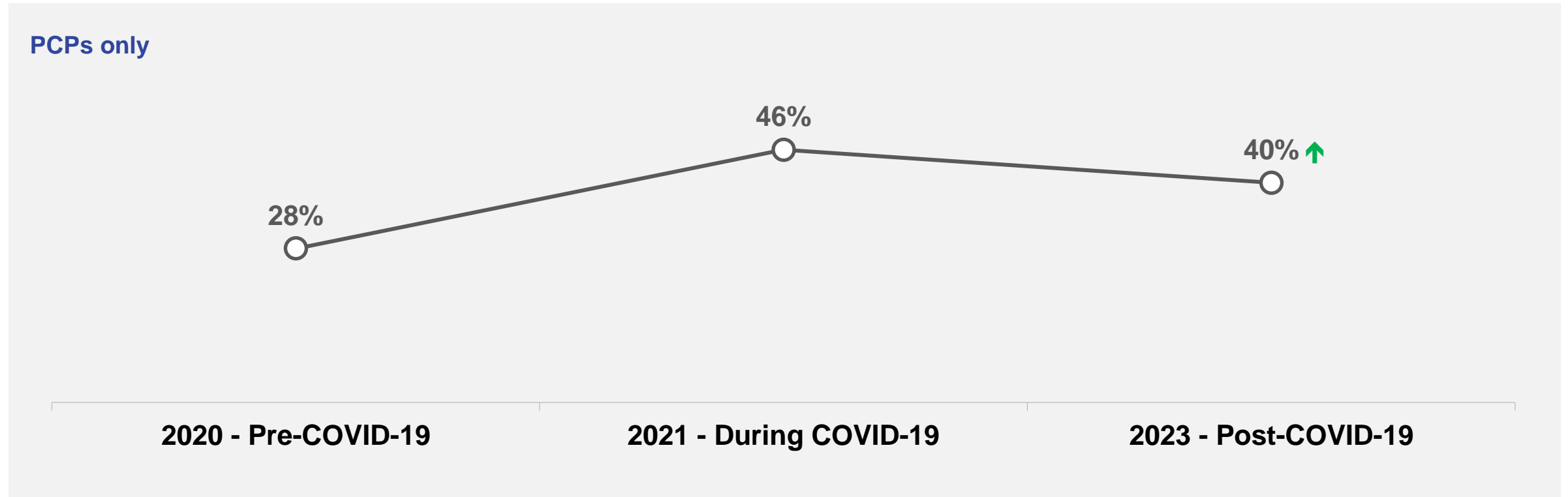| Market	PCPs	Paeds	Oncs	Neuros
UK	100	70	61	60
France	100	70	60	60
Italy	100	70	60	60
Spain	100	71	60	60
Germany	100	70	60	60
USA	200	72	60	60
Turkey	100	50		
India	150	50		
China	151	71		
Japan	100	71		
South Korea	50	50		
Vietnam	50	50		
Australia	51	40		
Brazil	100	50		
Belgium	50			
Netherlands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

Fieldwork took place between October 2022 – March 2023

Ipsos

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

Ipsos

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

PCPs only

46%

40% ↑

28%

2020 - Pre-COVID-19   **2021 - During COVID-19**   **2023 - Post-COVID-19**

↑/↓ Indicates statistically significant difference with 2020 wave

Ipsos

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

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

Ipsos

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

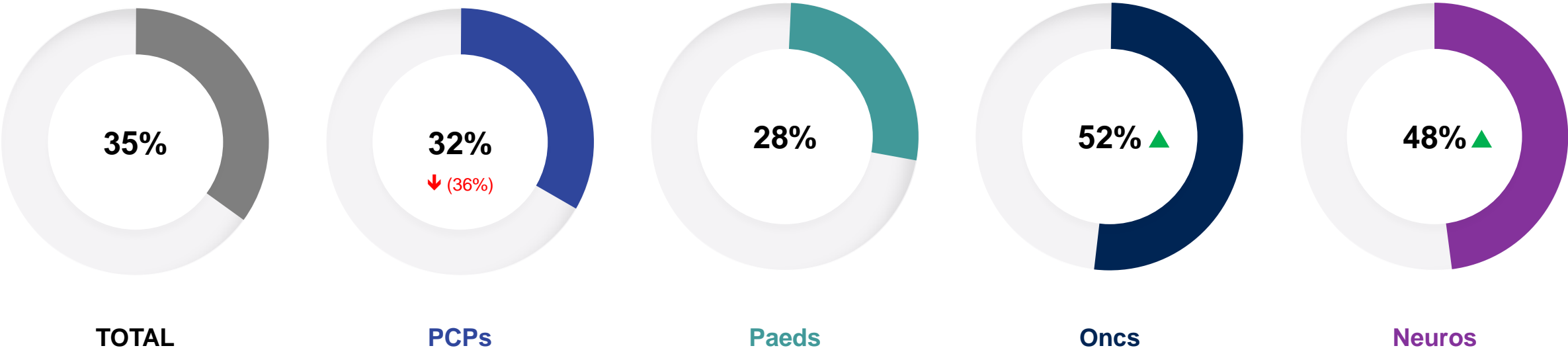*Top 2 Box: On a scale of 1-7, where 1 is 'completely disagree' and 7 is 'completely agree

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)

35%

TOTAL

32%
↓ (36%)

PCPs

28%

Paeds

52% ▲

Oncs

48% ▲

Neuros

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

Ipsos

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

Results shown based on % of HCPs selecting each statement

Ipsos

What is DTx?

Digital therapeutics are evidence-based therapeutic interventions driven by high quality software programs to prevent, manage, or treat a medical disorder or disease. Examples of such digital health solutions include Diabetes management programs by Welldoc, Opioid addiction therapy through an app by Pear Therapeutics.

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

Awareness of definition of DTx

27%

Recommended a DTx

25%

Prescribed a DTx

18%

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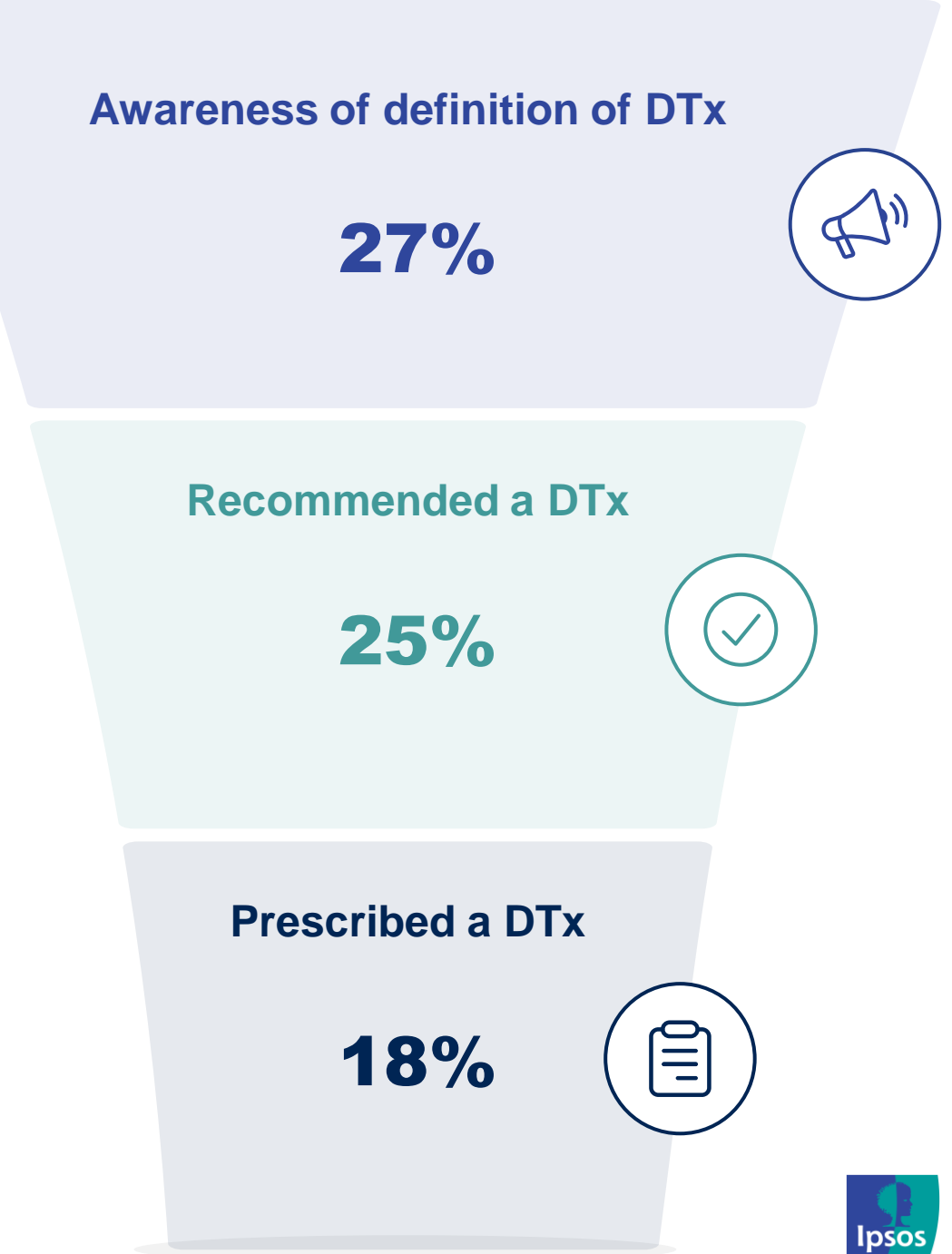
Not having enough training on how to use DTx as well as a belief that they lack efficacy and sufficient clinical evidence are the main issues with DTx

Agreement with statements (Top 2 Box*)

62%
There is not enough training on how to use DTx

48%
Not all DTx treatments are effective
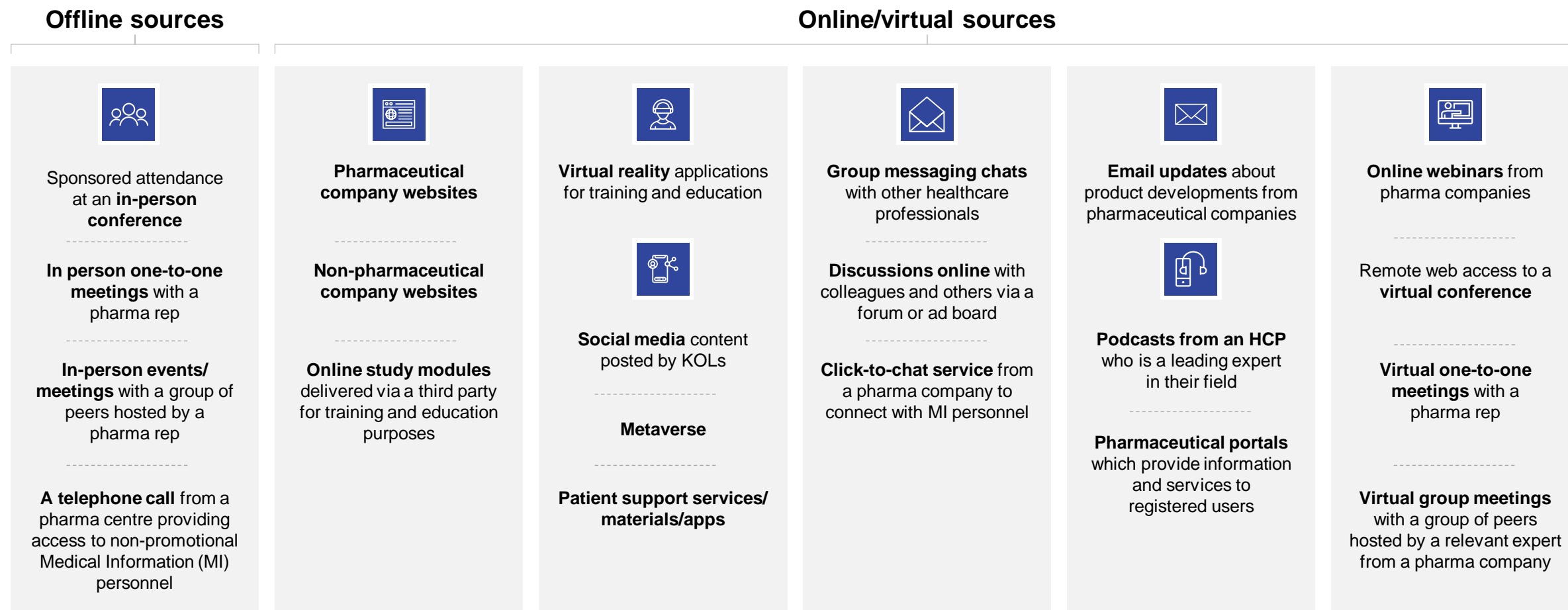
45%
There is not enough clinical evidence on DTx

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

Ipsos

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**

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

---

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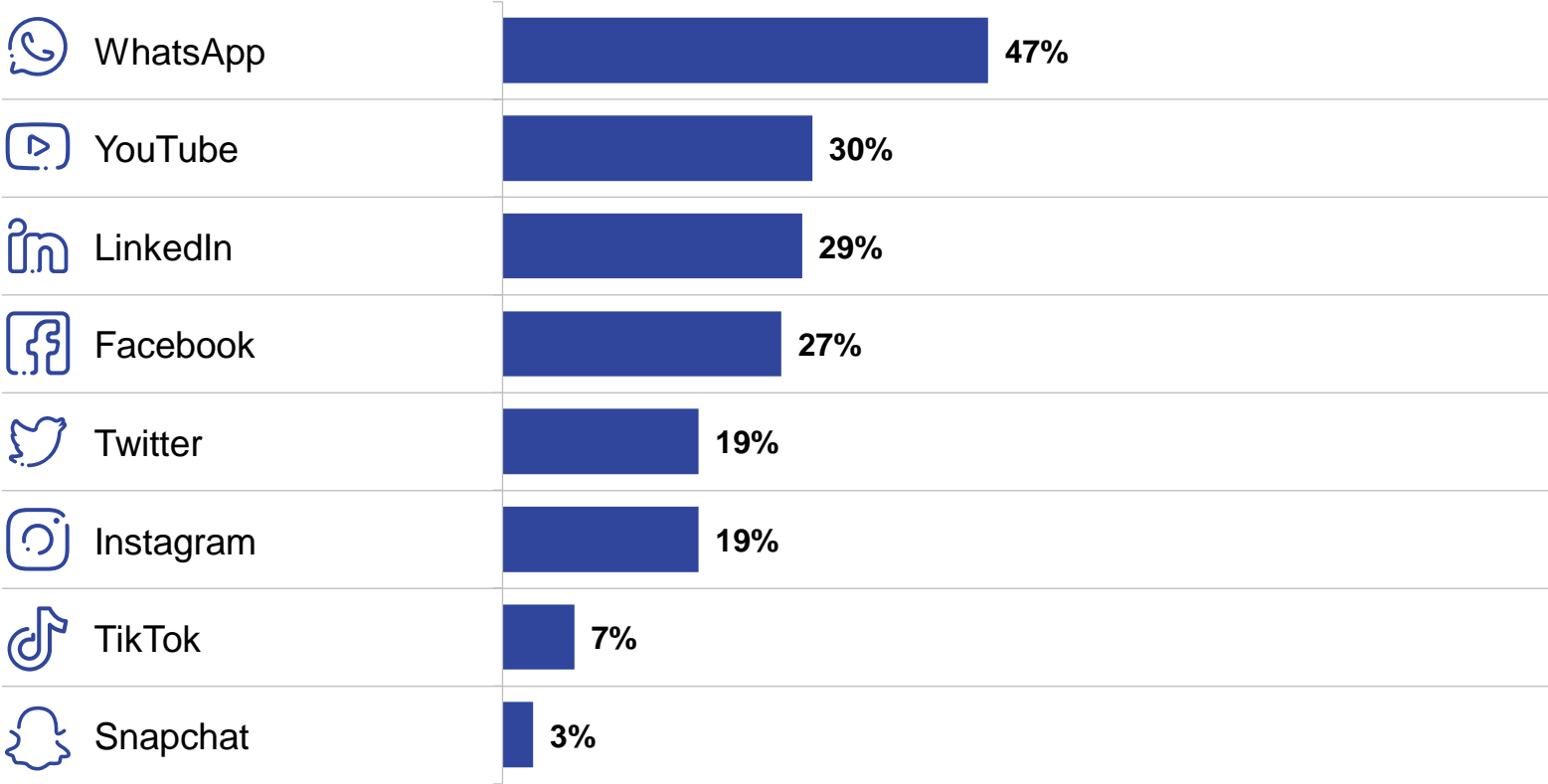
An omnichannel reality is becoming evident, however, a mind shift towards a more consumer centric model is required

© IPSOS | DIGITAL DOCTOR HEALTH TRACKER SURVEY | MARCH 2022 | VERSION 1 | PUBLIC

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

Platform	%
WhatsApp	47%
YouTube	30%
LinkedIn	29%
Facebook	27%
Twitter	19%
Instagram	19%
TikTok	7%
Snapchat	3%

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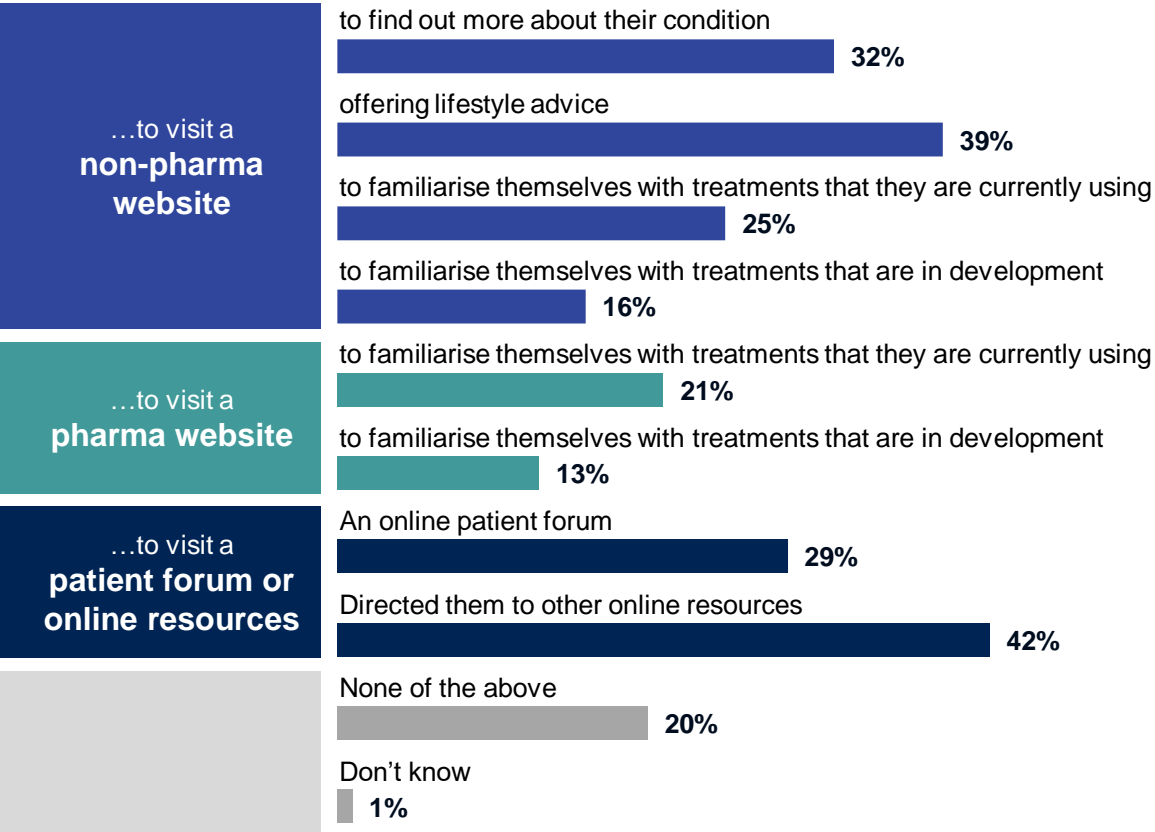*Base:* All respondents Total (n= 3,428)

Results shown based on % of HCPs selecting each statement

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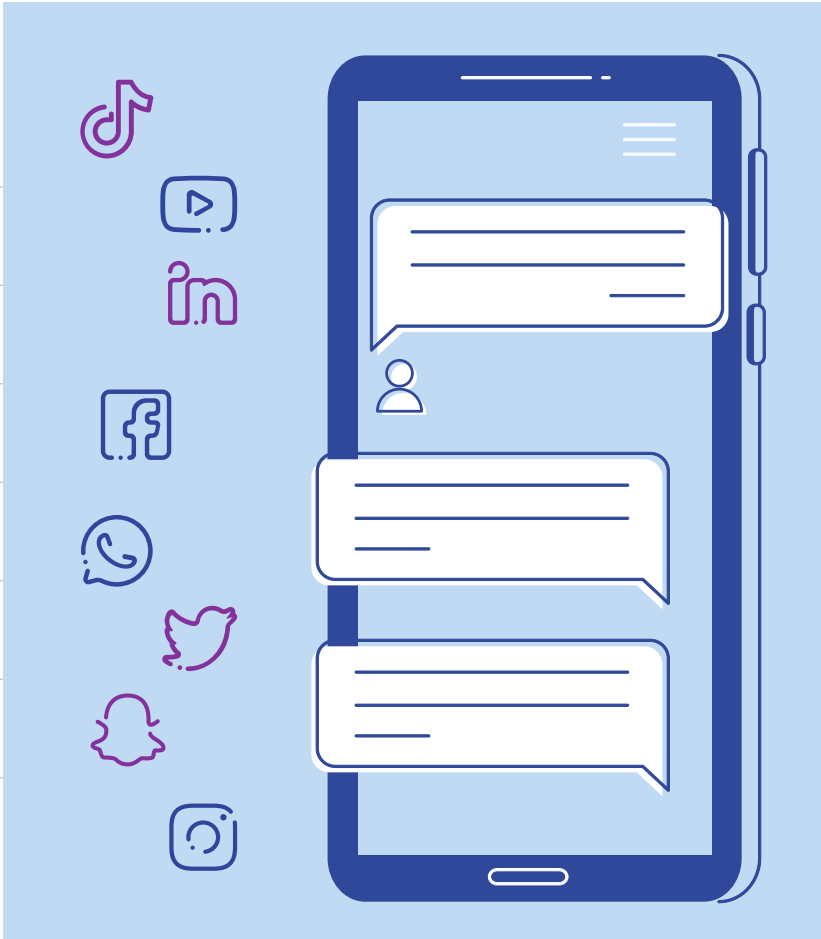
HCPs most typically direct patients to non-pharma sites offering lifestyle advice and to other online resources

In the past year I have recommended to my patients…

…to visit a **non-pharma website**

to find out more about their condition
32%

offering lifestyle advice
39%

to familiarise themselves with treatments that they are currently using
25%

to familiarise themselves with treatments that are in development
16%

…to visit a **pharma website**

to familiarise themselves with treatments that they are currently using
21%

to familiarise themselves with treatments that are in development
13%

…to visit a **patient forum or online resources**

An online patient forum
29%

Directed them to other online resources
42%

None of the above
20%

Don't know
1%

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*

Ipsos

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

Contact us:

Nancy MOK

Director

nancy.mok@ipsos,com

Ipsos