

INSPIRING BETTER HEALTHCARE DIGITAL & CONNECTED HEALTH

Digital Doctor 2020

21-country global survey among 1,745 primary care physicians

- Exploring attitudes to digital and connected health
- Looking at ownership and use of connected health
- Covering channel usage
- Examining awareness and use of telehealth/virtual care
- Uncovering awareness, understanding and use of digital therapeutics (DTx)

Ipsos is excited to announce the launch of its Digital Doctor 2020 survey: A global quantitative study to understand Doctors' perceptions, usage and opportunities within digital and connected health



Comprehensive overview of digital behaviour and future trends among primary care practitioners across the globe, with data available for more than 20 countries, across 4 regions – Ipsos is the only company currently providing this information.



Important insights into what Doctors really think about digital channels/activities, awareness and usage of these, and how this might change going forward – vital information for enabling clients to optimally shape and position their digital offerings.



Thorough understanding of the latest developments in digital and connected health, including patient-generated health data, telehealth medicine and digital therapeutics – crucial to ensuring clients stay up to date and relevant in a rapidly evolving area.



Significant logistical benefits – the investment is cost-effective and quick (no need to design and execute an ad-hoc study), non-therapy area specific (therefore providing a broad generalizable overview), and benefits from a large sample that can be stratified into groups of interest (i.e. age, generation).

The 21 countries included in Digital Doctor 2020:

Europe: UK, France, Italy, Spain, Germany, Belgium, Netherlands

North America: USA, Canada

LATAM: Colombia, Brazil

APAC: Australia, India, Japan, China, Hong Kong, Malaysia, Singapore, Indonesia, South Korea, Vietnam

Global report available for £18,500 GBP/\$24,200 USD

Country level reports, tailored workshops for your team and additional ad-hoc analysis also available

Digital Doctor 2020 - Report structure and content



AWARENESS AND KNOWLEDGE

We presented physicians with a number of different digital concepts related to healthcare such as telehealth/telemedicine, artificial intelligence, remote patient monitoring, robotics etc. and asked to rate their awareness and knowledge.



CURRENT CHANNEL USAGE AND USEFULNESS OF EACH CHANNEL

We showed a number of different channels to physicians (a mix of online/offline channels such as: discussions with colleagues/peers, in-person events/meetings, online webinars, pharma websites, online study modules etc.) and asked them which of the following channels they have used in the last three months and how useful they found them.



CONNECTED HEALTH

Attitudes and Usage: Here we explore professional usage of connected health devices, reasons for using these connected health devices (e.g. medical education and training, health record maintenance, clinical decision making, communication, etc.). We also address concerns here around connected health devices relating to patients (e.g. patients misinterpret data and advice), to data (e.g. security and reliability of data), to lack of training and available information and concerns around reimbursement, regulation and impact on workflow).



OUTCOMES

We focused on the outcomes of connected health to physicians. We have asked a question on total level around their agreement with a range of statements in relation to outcomes of using connected health devices or tools (e.g. allows patients to store personal health information securely, provides patients with greater access to their own personal health information, creates the opportunity for early therapeutic intervention etc.) to better understand how physicians view connected health devices. We have also asked a similar question to those who have recommended a connected health device to their patients, their views around how connected health had an impact to themselves and their patients.



TELEHEALTH/VIRTUAL CARE

We wanted to understand more about current levels of usage of telehealth and barriers of usage (such as lack of training, limited technology infrastructure), as well as likelihood to practice telehealth in the next 12 months.



DIGITAL THERAPEUTICS (DTX)

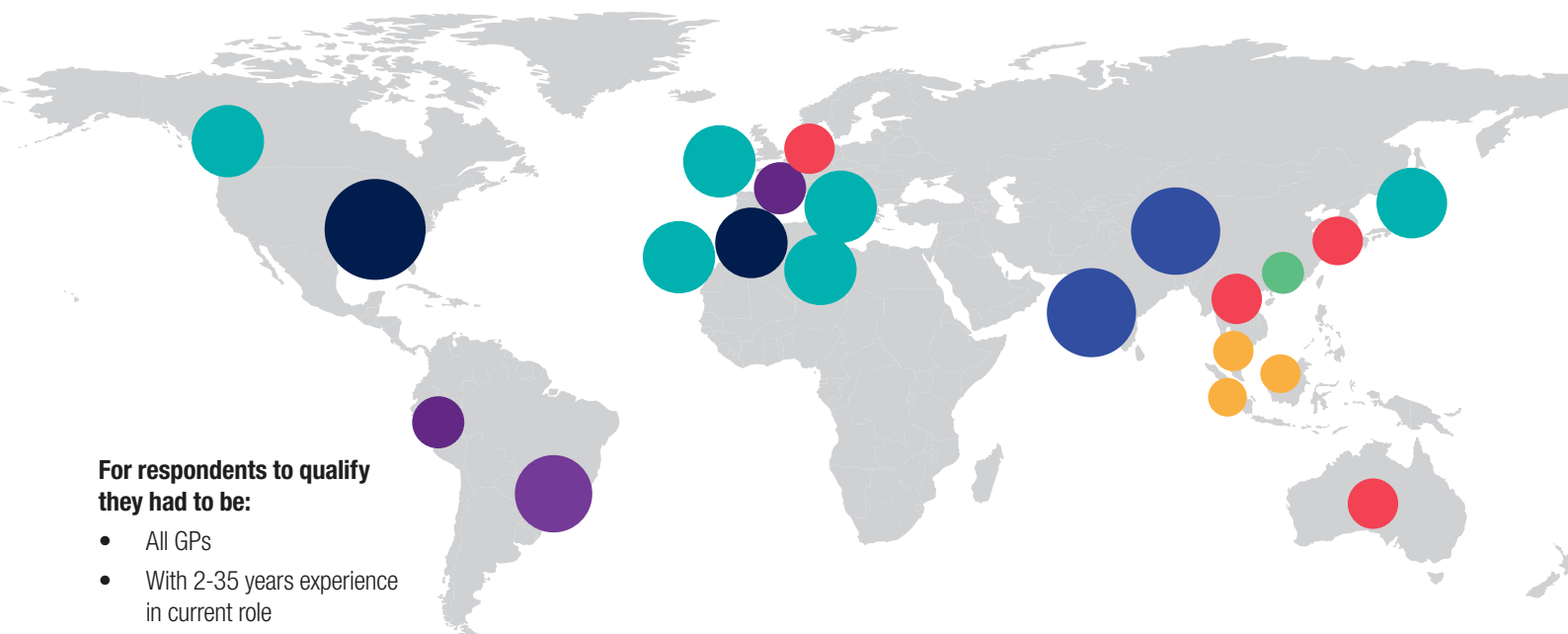
Here we asked respondents of their spontaneous definitions of DTx. Then we provided the official definition of DTx and asked how aware they were of this definition. We presented some statements to understand their sentiment and understanding of DTx (e.g. I am optimistic about it, patients will request a DTx instead of a pill in the next 5 years, etc.). We also captured the current prescribing levels of DTx, how do they anticipate this will change in the next 5 years, and how can we encourage prescription levels (e.g. by providing clinical evidence etc.).



It should be noted, throughout the report we also mention the impact of COVID-19 and include information from another internal study, which explored the broader trends that will dominate the world in the 2020s and their impact specifically on healthcare.

Secondary research has also been carried out to support our main findings and also we have trended data since last wave (2017), where possible.

1,745 doctors have been interviewed



For respondents to qualify they had to be:

- All GPs
- With 2-35 years experience in current role
- And more than 25 years old

Country	No. of completes
USA	200
India	151
China	150
Brazil	116
France	101
UK	100
Italy	100
Spain	100
Germany	100
Canada	100
Japan	100

Country	No. of completes
Belgium	51
Colombia	51
Netherlands	50
Australia	50
S. Korea	50
Vietnam	50
Hong Kong	35
Malaysia	30
Indonesia	30
Singapore	30

Webinar recording

DIGITAL DOCTOR 2020

A 21-COUNTRY STUDY OF 1,745 DOCTORS'
PERSPECTIVES ON DIGITAL & CONNECTED HEALTH



Access the webinar recording



Access our Digital Doctor 2020 webinar recording

Running since 2015, Ipsos' Digital Doctor is one of the largest studies of its kind covering digital and connected health. Comprising 21 countries, the survey explores 1,700 Doctors' views, behaviors and attitudes to digital communication channels, use of wearables, apps to obtain patient-generated health data, telehealth and the role of virtual care, digital therapeutics and much more.

[View our webinar recording](#) and listen as Ipsos' Connected Health experts review the results of Digital Doctor 2020. This year's report marks the most exciting in the series thus far, covering a comprehensive look into the digital transformation of healthcare:

- Which digital channels are Doctors engaging with, and where should future investments be focused?
- How many Doctors are actively using telehealth solutions and/or recommending digital solutions to patients?
- Do Doctors have an understanding of digital therapeutics (DTx) and are they willing to prescribe them?
- What outcomes are expected of digital & connected health?

The few years since Ipsos' last Digital Doctor survey in 2017 have been totally transformative, with new reimbursement codes introduced for patient-generated health data review, the rise of telehealth providers and multiple new digital therapies with FDA/NICE clearance now on the market.

Digital Doctor 2020 marks a milestone to observe and learn from Doctors working on the front line in primary care: How they feel about all the new tools available to them? What will help them in the future?

Contact us:

Reena Sangar

Head of Digital and Connected Health

reena.sangar@ipsos.com

About the Ipsos Healthcare Service Line

Ipsos Healthcare partners with pharmaceutical, bio-tech and medical device manufacturers to inspire better healthcare. Operating in over 50 countries, our 1000+ experts support key business decisions for our clients throughout the commercial lifecycle, from early-stage strategy, to launch, to performance optimisation. We do this through a uniquely integrated combination of therapeutic and market expertise, gold standard real world evidence, and market-leading custom research approaches – all underpinned by a global footprint and unprecedented access to today's healthcare stakeholders.