



Press Release

Connected health: Coming, ready or not!

Ipsos Healthcare reveals top-line findings from the first Ipsos International survey on connected health

London, 11 May 2015 – A new online survey published today among adults aged 18-80 in the USA, UK and Japan (5,003, 3,002 and 3,008, respectively) reveals that around half of those in the USA and UK, together with a fifth in Japan, agree that they would use a connected health device or tool as part of their treatment plan if it was recommended to them by a physician.

However, a corresponding survey among 200 physicians in each of these markets (a mix of GPs/PCPs, endocrinologists and diabetologists) finds that only a minority consider themselves knowledgeable enough to choose the right connected health device or tool for their patients (24% in the US, 12% in the UK and 11% in Japan).

These findings come from the First Ipsos International Survey on Connected Health – a syndicated research report which offers a picture of the uptake and use of connected health devices (CHDs) and/or tools.¹

The inaugural survey – conducted online between 14th September and 20th November – also contains an in-depth focus on Type 2 Diabetes across the study markets, including a technology preference segmentation of diabetes patients in all three countries. The report also includes ‘mirror image’ questions to Type 2 Diabetes patients and physicians to uncover similarities and differences in perceptions around connected health.

Top-line findings are being presented at the [Health 2.0 Europe](#) Conference in Barcelona on 11th May 2016.

Differences in the speed of adoption

Although both the diseases and the technologies for connected health are global, findings suggest that the speed of CHD adoption across the study markets is not. According to the research, the USA

¹ For definition visit <http://connectedhealth.ipsos.com/>



Press Release - continued -

leads the field, with 21% of the US general public now using some form of connected health device or tool to manage their health. This is followed by 11% in the UK and 5% in Japan.

For all three countries, however, the future looks set to be more connected in this respect: 37% of the general public in the US, together with 26% in the UK and 13% in Japan, believe that CHDs will form part of treatment plans in the future.

However, the research also reveals that there is a relatively high former-user dropout rate when compared to the percentage of current users in each market (48% in the USA, 42% in UK and 38% in Japan).

Commenting on this finding, **Reena Sangar**, Ipsos Healthcare's Head of Digital and Connected Health, said:

"In order to ensure continued uptake in the adoption of CHD's further work is required to better understand the reasons for this relatively high dropout level."

Consensus on drivers for use

Looking at the 'mirror image' data, both Type 2 Diabetes patients and physicians are in agreement on the top reasons for CHD uptake and recommendation. Among the top mentions were: weight loss; to monitor/improve exercise; and to get self/patients interested in their own health.

Commented **William Hall**, Head of Ipsos Healthcare Japan:

"Connected health can enable patients and other CHD users to be more actively engaged with their own healthcare, and to drive outcomes that improve or maintain their health. It can also allow physicians to provide recommendations based on more than an occasional consultation. Already, we can see the beginnings of a shift in the patient-provider relationship".

Highlighting a need for education and support

Although cost is perceived as the number one barrier by both physicians and Type 2 Diabetes patients, there are clear differences around perceived knowledge levels and responsibility for connected health uptake between physicians and Type 2 diabetes patients.

More than a third (36%) of UK physicians say an important barrier to uptake is that patients had never asked for a connected health device – but for 20% of the UK general public and 37% of Type 2 Diabetes patients in the UK, the barrier is that the physician had not recommended one. These



Press Release - continued -

proportions are lower in the USA but still reflect a level of disconnect (22% of physicians versus 16% of the general public and 27% of Type 2 Diabetes patients). This mismatch of expectations also occurs in Japan (27% of physicians versus 6% of the general public and 11% of Type 2 Diabetes patients).

Furthermore, some 33% of the general public in the USA and 23% in the UK consider their physician to be knowledgeable enough to choose the right connected health device or tool for them. By contrast, only 24% of physicians in the USA and 12% in the UK consider themselves knowledgeable enough to choose the right connected health device or tool for their patients. In Japan, the opposite is true: 11% of physicians consider themselves knowledgeable enough to choose the right connected health device or tool for their patients, versus 4% of the general public.

Concluded Sangar:

“By enabling earlier diagnosis, preventing disease onset and reducing healthcare costs, connected health has the potential to transform global healthcare. However, greater education and support in navigating the connected health landscape is clearly vital if we are to realise its considerable potential.”

The syndicated reports on the First Ipsos International Survey on Connected Health are available now. The first report includes the general public and physician perspective in addition to the deep dive and segmentation on Type 2 Diabetes patients. The second report includes the general public and physician perspectives only.

For more information visit <http://connectedhealth.ipsos.com/> or contact Reena.Sangar@ipsos.com.

About the research

Ipsos Healthcare conducted two independent online surveys, the first among the general public (20-minute survey) and the second among physicians (15-minute survey). The general public sample comprised adults aged 18-80 across UK, USA and Japan. Quotas were set by region, age and gender to match the national census and sub-categories that were under-represented were weighted back to the national census figures in each country. The Type 2 Diabetes sample was boosted and re-weighted back to true population proportions at analysis stage. “Mirror image” questions were asked to consumers, Type 2 Diabetes patients and physicians to ascertain degree of similarity/difference in perceptions of connected health.



Press Release - continued -

Fieldwork was conducted in September – November 2015.

General public sample:	UK	USA	Japan
Adults (18-80)	3002	5003	3008
Type 2 Diabetics	303	503	301

Physician sample:	UK	USA	Japan
General Practitioners/Primary Care Physicians	100	100	102
Endocrinologists/Diabetologists	100	100	104

About Ipsos Healthcare

Ipsos Healthcare is the global healthcare division of Ipsos, the world's third largest market research company. In partnership with its clients from the pharmaceutical, biotechnology and medical technology sectors, Ipsos Healthcare strives to inspire better healthcare – by delivering integrated solutions that help clients to optimise their business decisions. Operating in over 40 countries, the 500-strong team draws on a unique combination of therapeutic expertise, specialist market knowledge, global presence, and industry-leading custom and syndicated approaches to reveal the motivations, experiences, interactions and influences of today's multiple healthcare stakeholders. www.ipsoshealthcare.com

About Ipsos

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Press Release - continued -

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