

# Digital Doctor 2020

A 21-country study of 1,745 Doctors' perspectives on digital and connected health

**Reena Sangar**

Head of Digital and Connected Health

# Welcome to Digital Doctor 2020!

Today's presenter – ready to guide you through our journey into Doctors' perspectives on digital & connected health

**Reena Sangar** is a passionate leader in the field of connected health. Often speaking mainstage on global platforms, such as HLTH, CES and Frontier's Health, Reena heads Ipsos' Global Centre of Expertise in Digital and Connected Health. Reena is passionate about developing global data assets that push the connected health field forward.

Reena has directed large strategic studies mapping connected health among payers, healthcare professionals and patients. Most recently, Reena led research amongst key decision makers on digital therapeutics and monetisation of patient-generated health data.

Reena has a personal passion for ageing and technology; she has contributed to cross-industry alliances focussed on the "longevity challenge," advised on early stage technology concepts targeted to this group and conducted numerous studies on user experience and patient journey.

Reena has a Bsc in Psychology from University of Kent, she has worked for the National Health Service (NHS) in the UK as a cognitive behavioural therapist before running a mental health charity for a UK non-profit organization. Reena is a Director for Ipsos, based in London.

## Reena Sangar

Global Head of Digital & Connected Health



# Expert panel



**Reena Sangar**

Global Head of Digital  
& Connected Health

**Presenter**



**Gareth Phillips**

Head of Healthcare  
EMEA

**Panelist**



**Jackie Ilacqua**

Global Head of  
Syndicated Services

**Panelist**

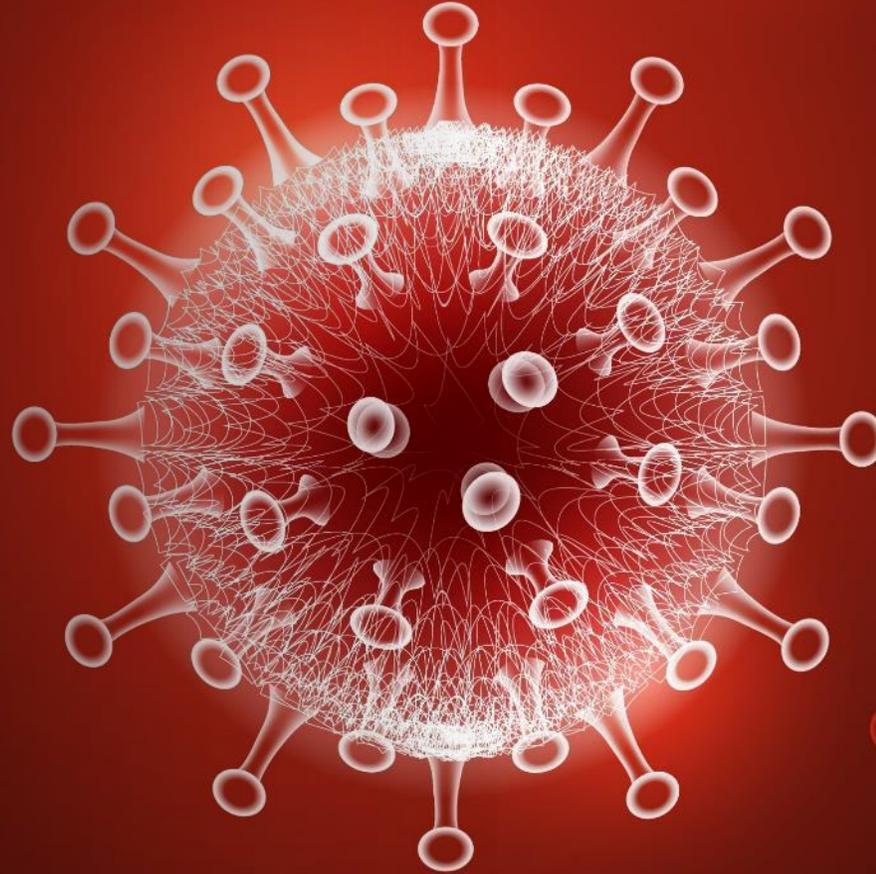


**Richard Tolley**

Head of Market Access  
EU

**Panelist**

# COVID-19: Unprecedented times



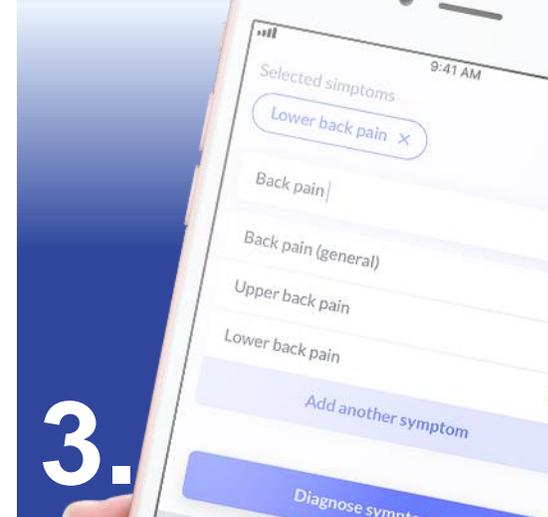
# The impact on digital & connected health



1. Telehealth/virtual care visits at scale



2. Launch of self-testing kits



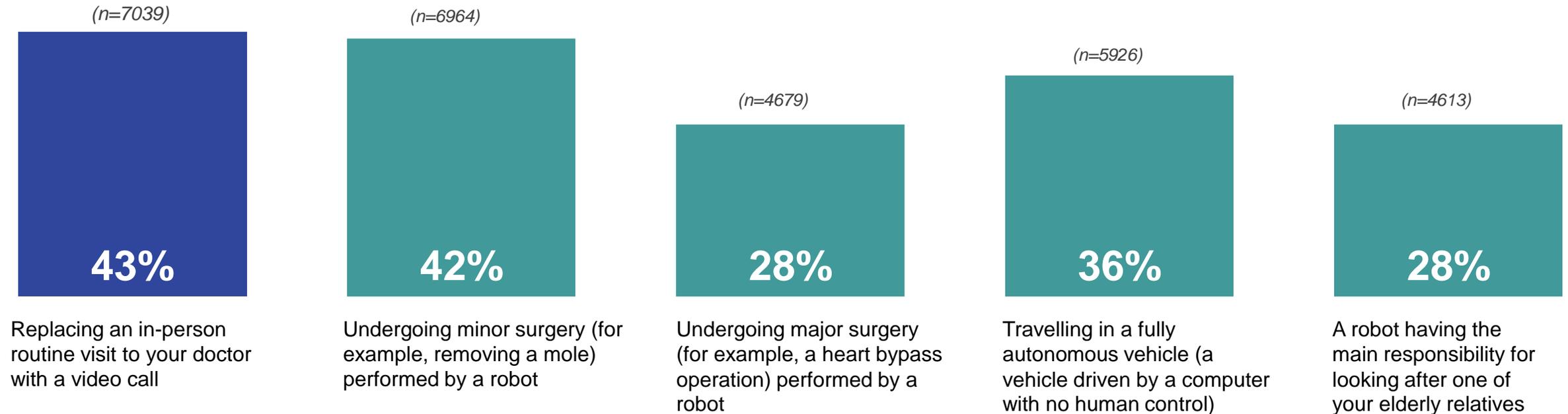
3. Triage chatbots



4. Global population health

# Replacing an in-person routine visit to your doctor with a video call

% comfortable with...



Source: Ipsos Global Trends 2020, Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019

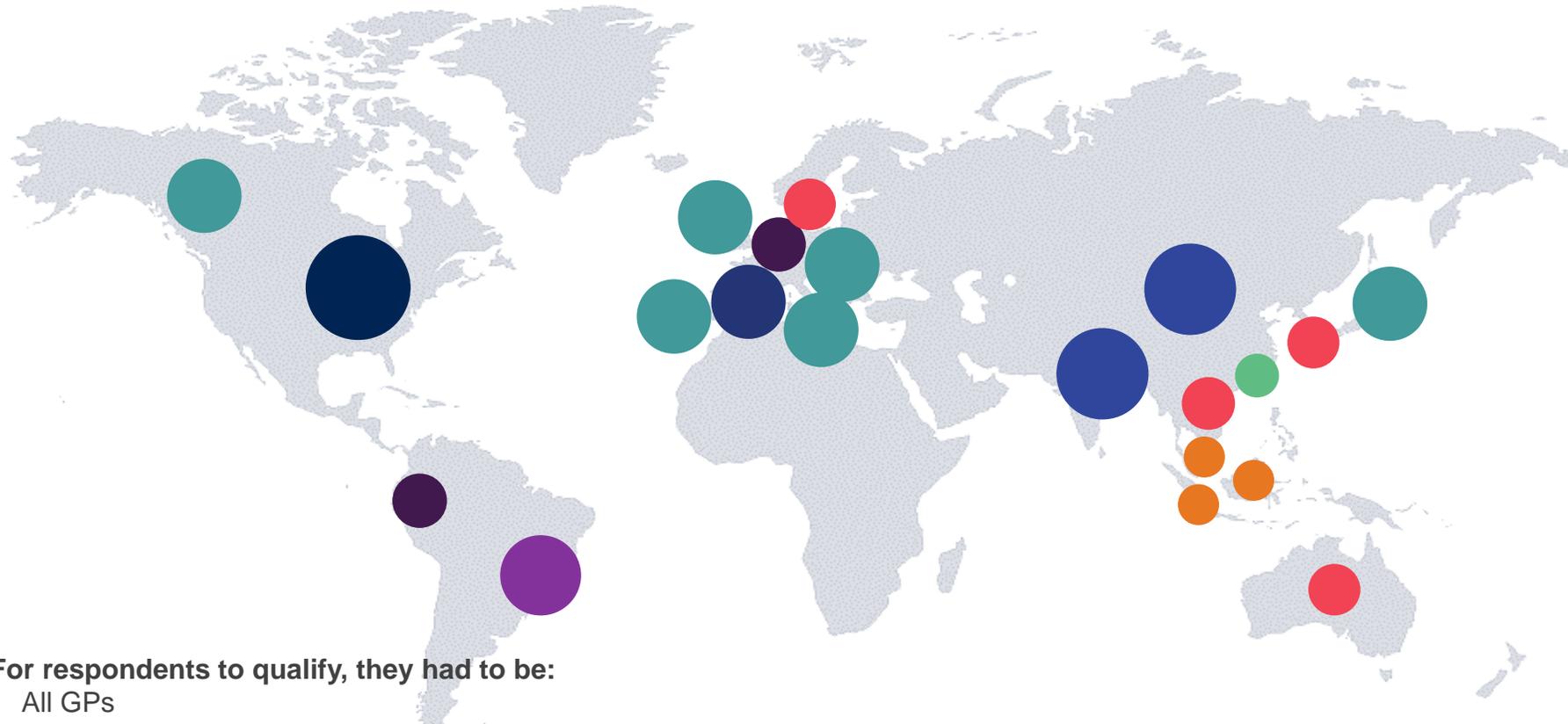
# An acceleration of macros forces is expected



Source: Ipsos Global Trends 2020, Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019

# Digital Doctor 2020

## 1,745 Primary Care Physicians 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
Belgium	51
Colombia	51
Netherlands	50
Australia	50
S. Korea	50
Vietnam	50
Hong Kong	35
Malaysia	30
Indonesia	30
Singapore	30

# Awareness of technologies



# Awareness varies between technologies

Doctors are most aware of...

**97%**

Telehealth

**93%**

Remote patient monitoring

**89%**

AI

**85%**

Robotics

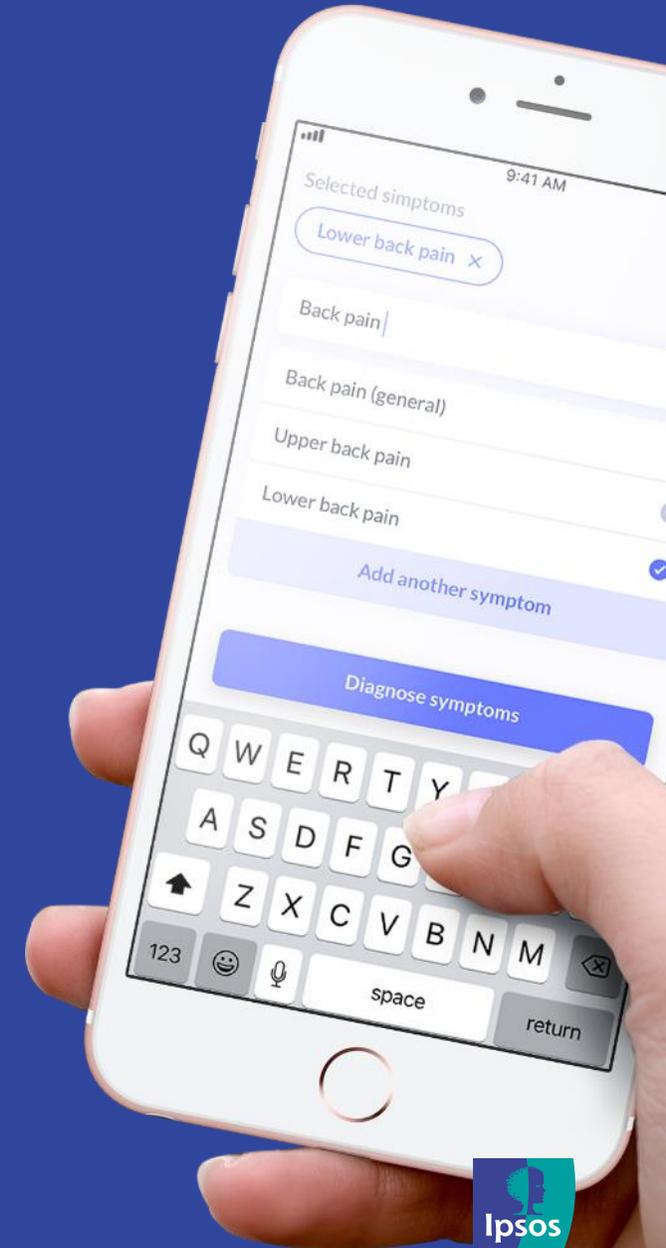
And least aware of...

**52%**

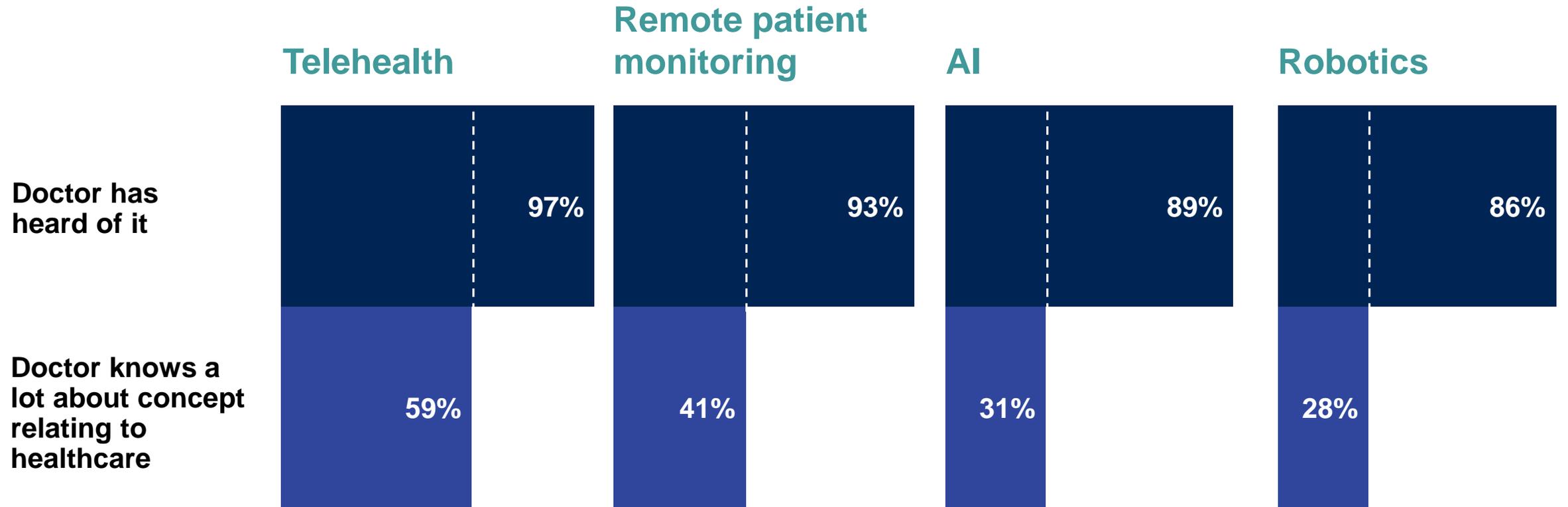
Chatbots

**44%**

Blockchain



# However, this doesn't always translate to knowledge



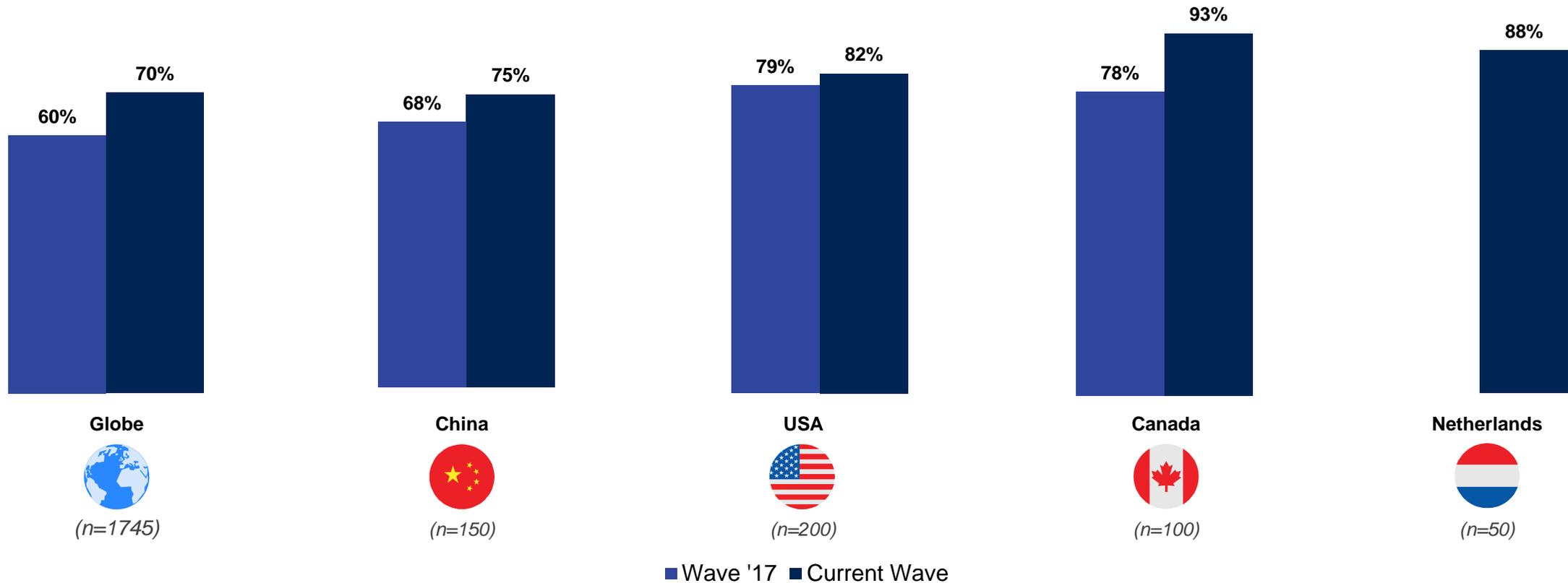
Digital Doctor 2020 (fieldwork November 2019 –February 2020) n= 1,745 PCPs across 21 countries

# Connected health Usage prior to COVID-19



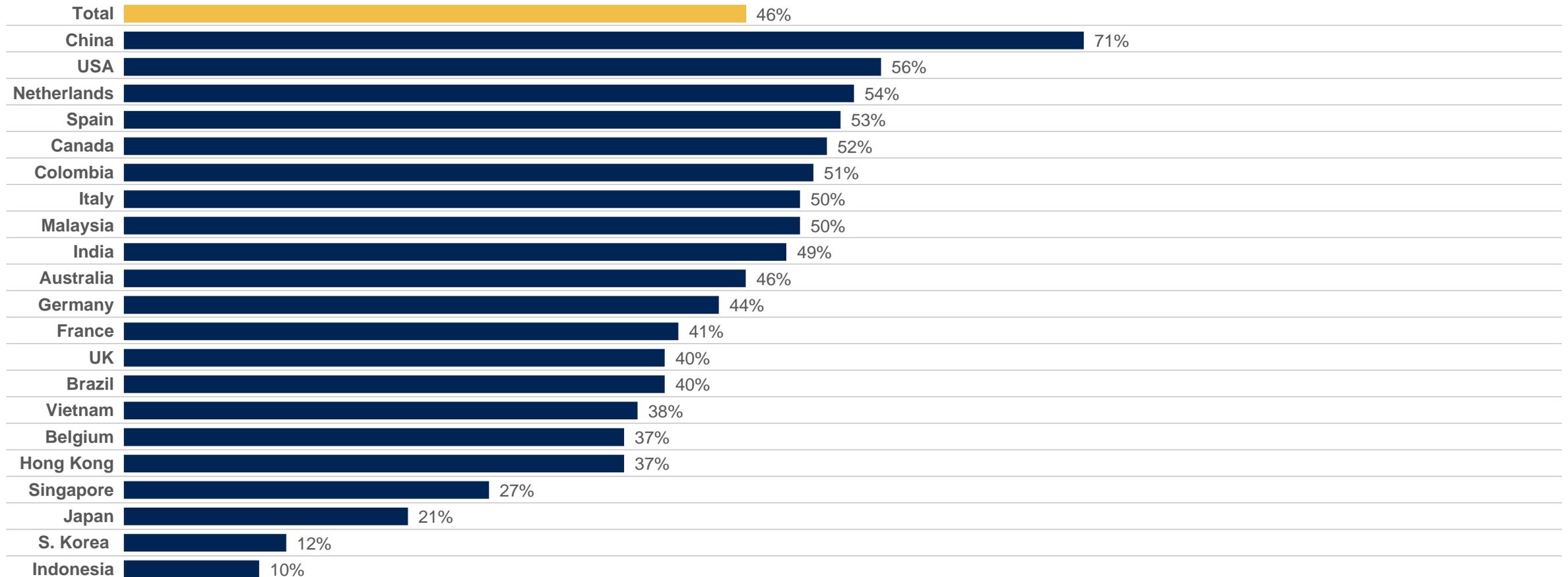
# Usage of connected health devices to support clinical decision making steadily increased since 2017

## Agreement to the following statements



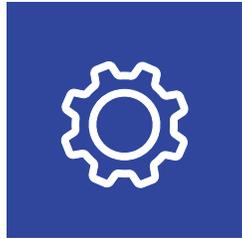
Source: Q2. In the past year, which of the following digital activities, if any, have you done?  
Base: All respondents, Total (n=1745)

# China was the lead market in terms of recommending connected health devices to patients for review in consultations



Source: Q5. In the past year, which of the following, if any, have you recommended for your patients?  
Base: All respondents (n=1745)

# Drivers and barriers to use



## Drivers



**Compliance**



**Early intervention**



**Reduce practice visits**



## Barriers



**Patient mis-interpretation**

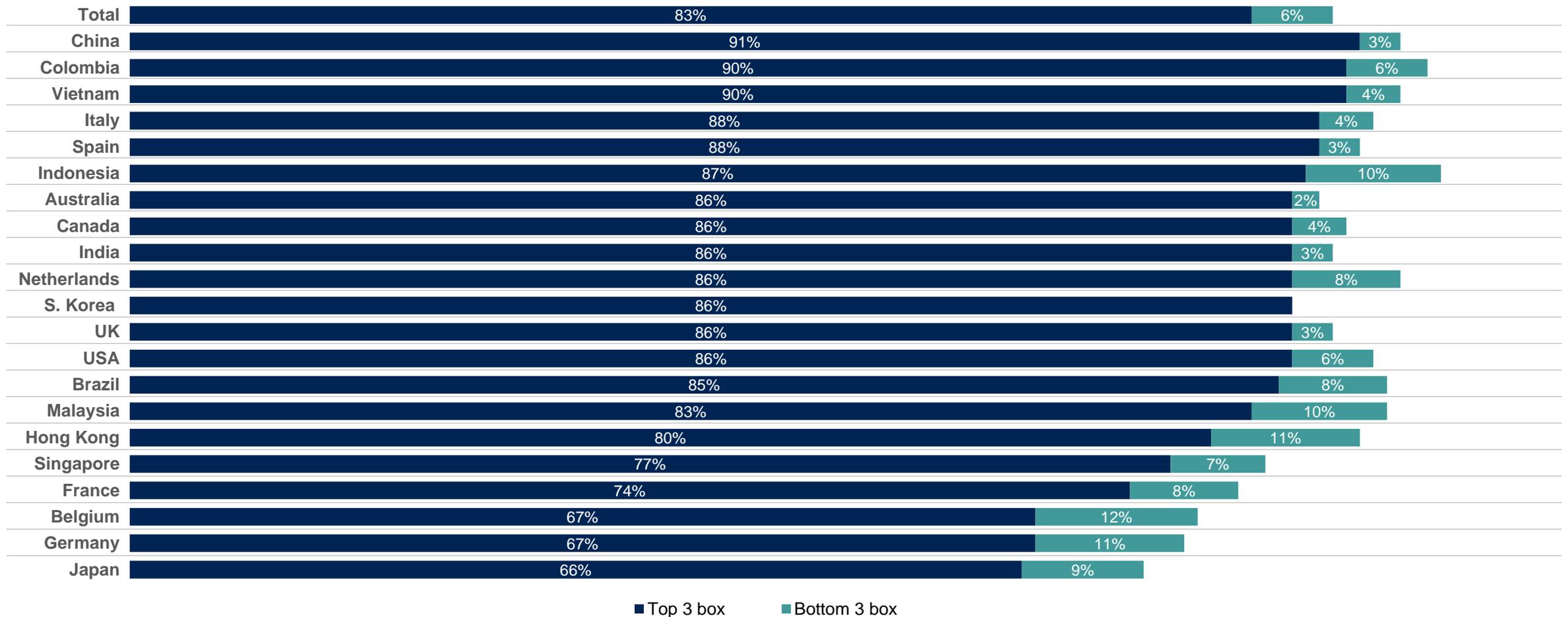


**Incorrect self diagnosis**



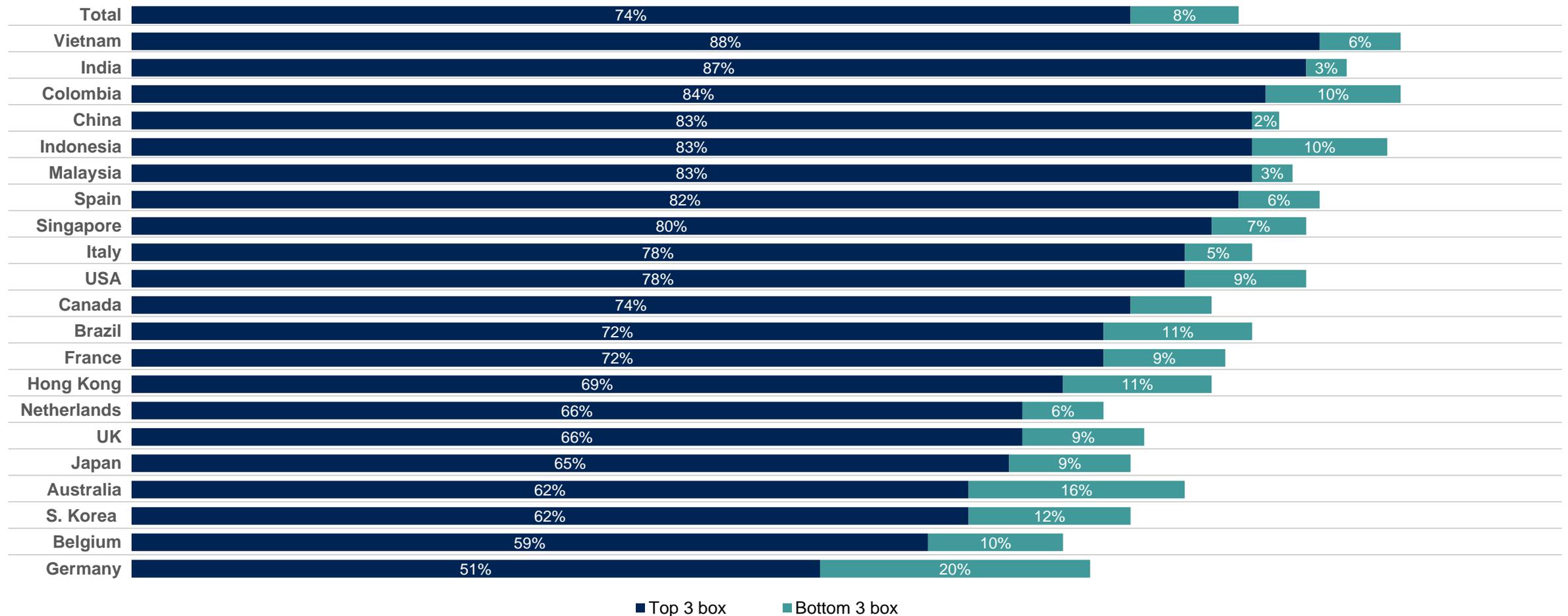
**Data security**

# The majority of doctors agree that connected health would enable patients to proactively manage their health and prevent disease



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=1745)

# Reliability of connected health devices is a question for some doctors



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=1745)

# Doctors' digital behaviour



# When are HCPs using connected health?

**31%**

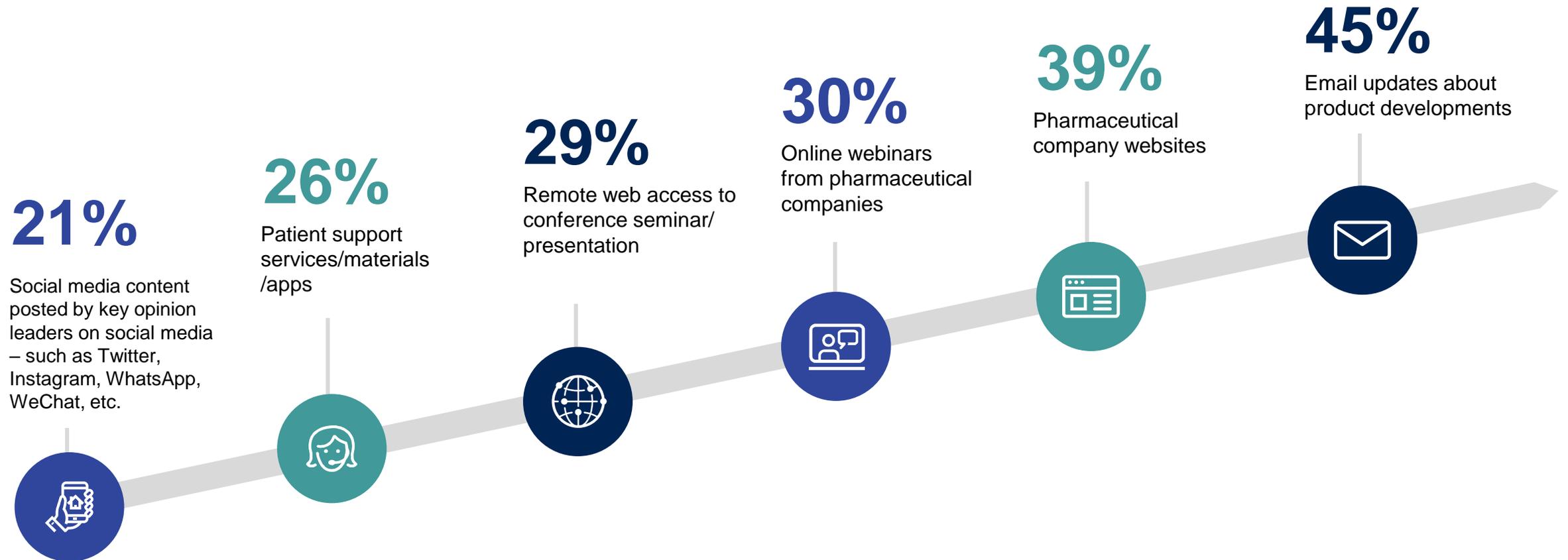
use connected health daily for professional use



**34%**

use connected health daily for personal use

# Interaction with digital channels for medical education is growing

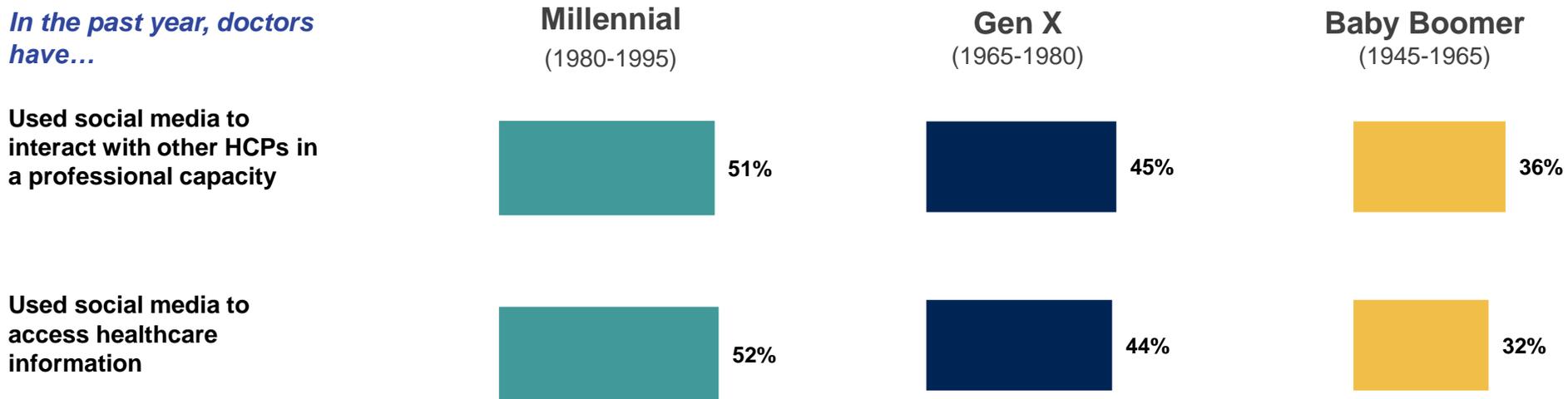


Digital Doctor 2020 (fieldwork November 2019 –February 2020) n= 1,745 PCPs across 21 countries

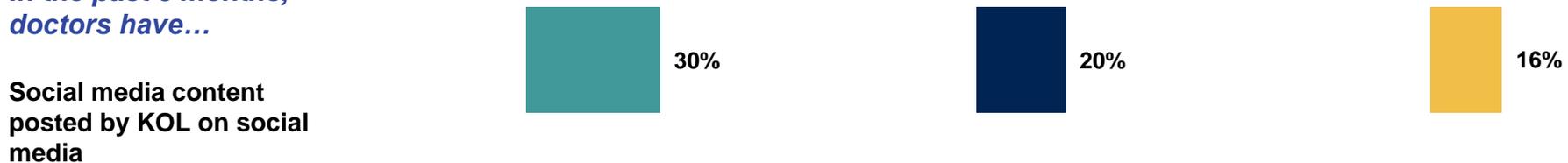
# The use of social media is more prevalent amongst younger PCPs vs. Baby Boomers

## Use of social media

*In the past year, doctors have...*



*In the past 3 months, doctors have...*



Source: Q2. In the past year, which of the following digital activities, if any, have you done? Q10b. 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, Millennial (1980-1995) (n=416); Gen X (1965-1980) (n=708); Baby Boomer (1945-1965) (n=464)

# Interactive engagement opportunities are key: How do we create this experience virtually?

## Top-rated channels



1.

In-person, one-to-one meetings with a pharmaceutical representative



2.

In-person events/meetings with a group of peers, hosted by a pharmaceutical representative



3.

Discussions with colleagues/peers/opinion leaders/other healthcare professionals

Digital Doctor 2020 (fieldwork November 2019 –February 2020) n= 1,745 PCPs across 21 countries

# Doctors see connected health as a means to empower the patient



# Better education, early intervention and improved compliance are considered top benefits

## Outcomes of using connected health devices or tools:



Digital Doctor 2020 (fieldwork November 2019 –February 2020) n= 1,745 PCPs across 21 countries

# What is telehealth?

**Telehealth involves the use of telecommunications and virtual technology to deliver healthcare outside of traditional healthcare facilities.**

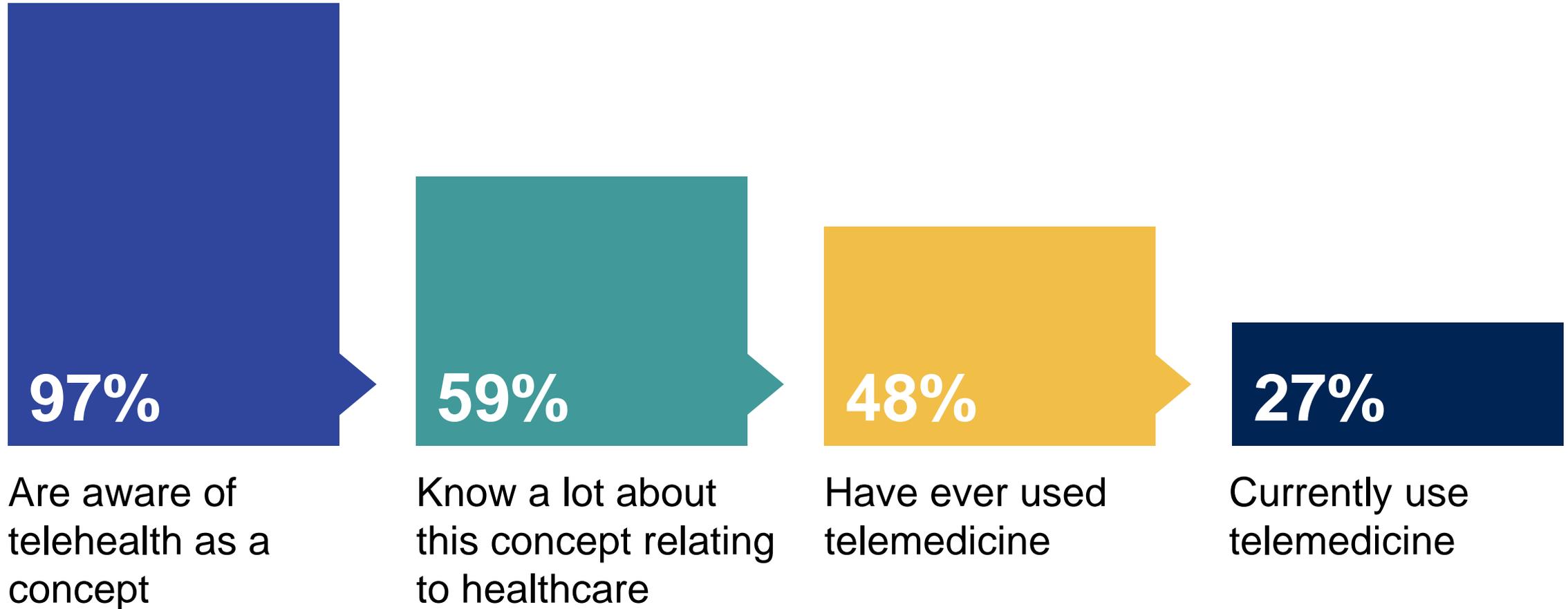
Telehealth examples include virtual home healthcare, where patients, such as the chronically ill or the elderly, may receive guidance in certain procedures while remaining at home.

Telehealth has also made it easier for healthcare workers in remote field settings to obtain guidance from professionals elsewhere in diagnosis, care and referral of patients.

<https://www.who.int/sustainable-development/health-sector/strategies/telehealth/en/>  
<https://catalyst.nejm.org/doi/full/10.1056/CAT.18.0268>



## (Prior to COVID-19) PCPs awareness of telehealth...



Digital Doctor 2020 (fieldwork November 2019 –February 2020) n= 1,745 PCPs across 21 countries

# Telehealth is now at the heart of healthcare service and delivery

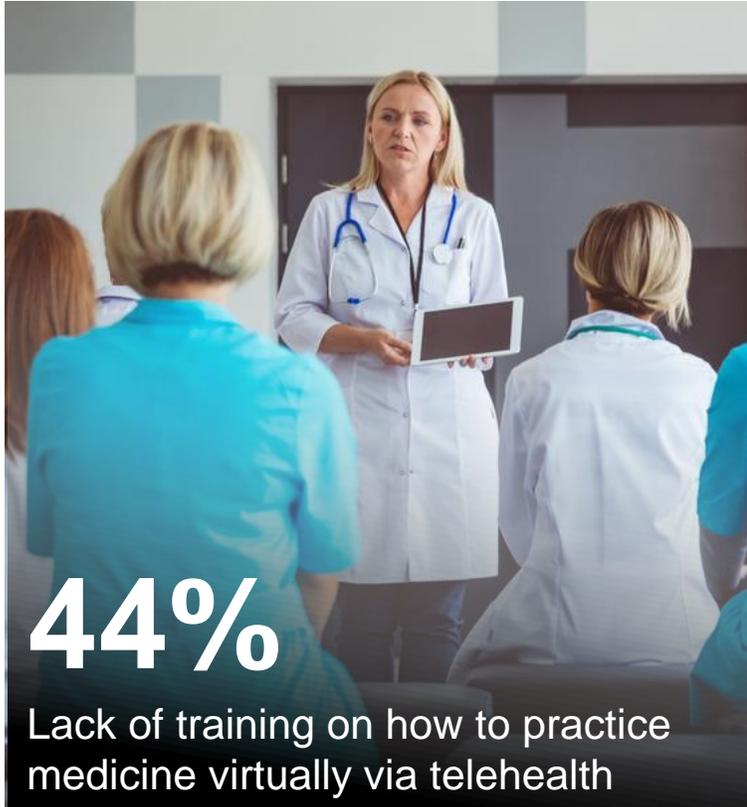
▶ 34% of Chinese consumers tried online medical consultations for the first time during COVID-19

▶ Medicare reimbursement, HIPAA and interstate licensing enables the US population with access to telehealth

▶ Regulations relaxed on remote monitoring devices to aid COVID-19 treatment, self monitoring



# Top barriers identified in Digital Doctor for telehealth that are critical to address today



Data from our COVID-19 HCP Forum Monitor indicates the same, and a need for **asynchronous remote care** to help alleviate long wait times and loss of clinical time, due to technical issues

Digital Doctor 2020 (fieldwork November 2019 –February 2020) n= 1,745 PCPs across 21 countries

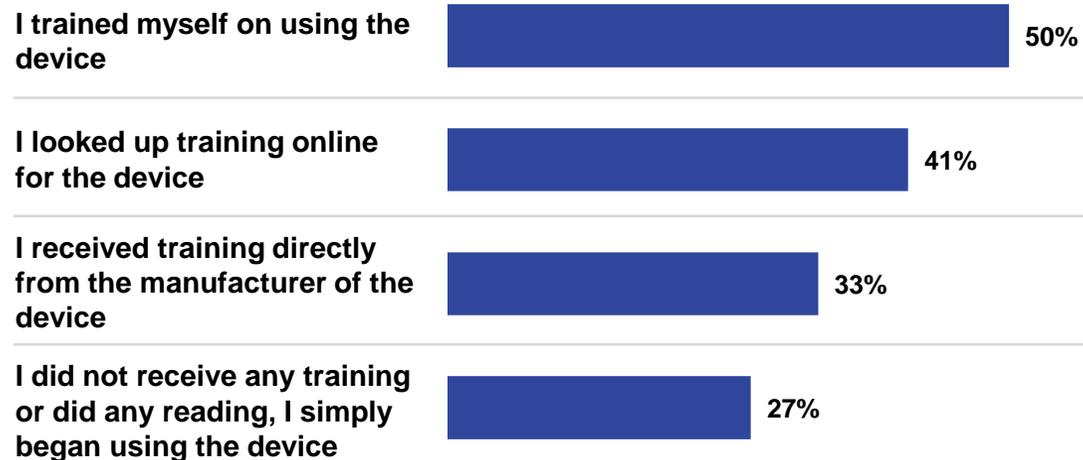
# Half of PCPs trained themselves when it came to connected health devices they use professionally

## Training received for connected health devices:

Globe



(n=1745)



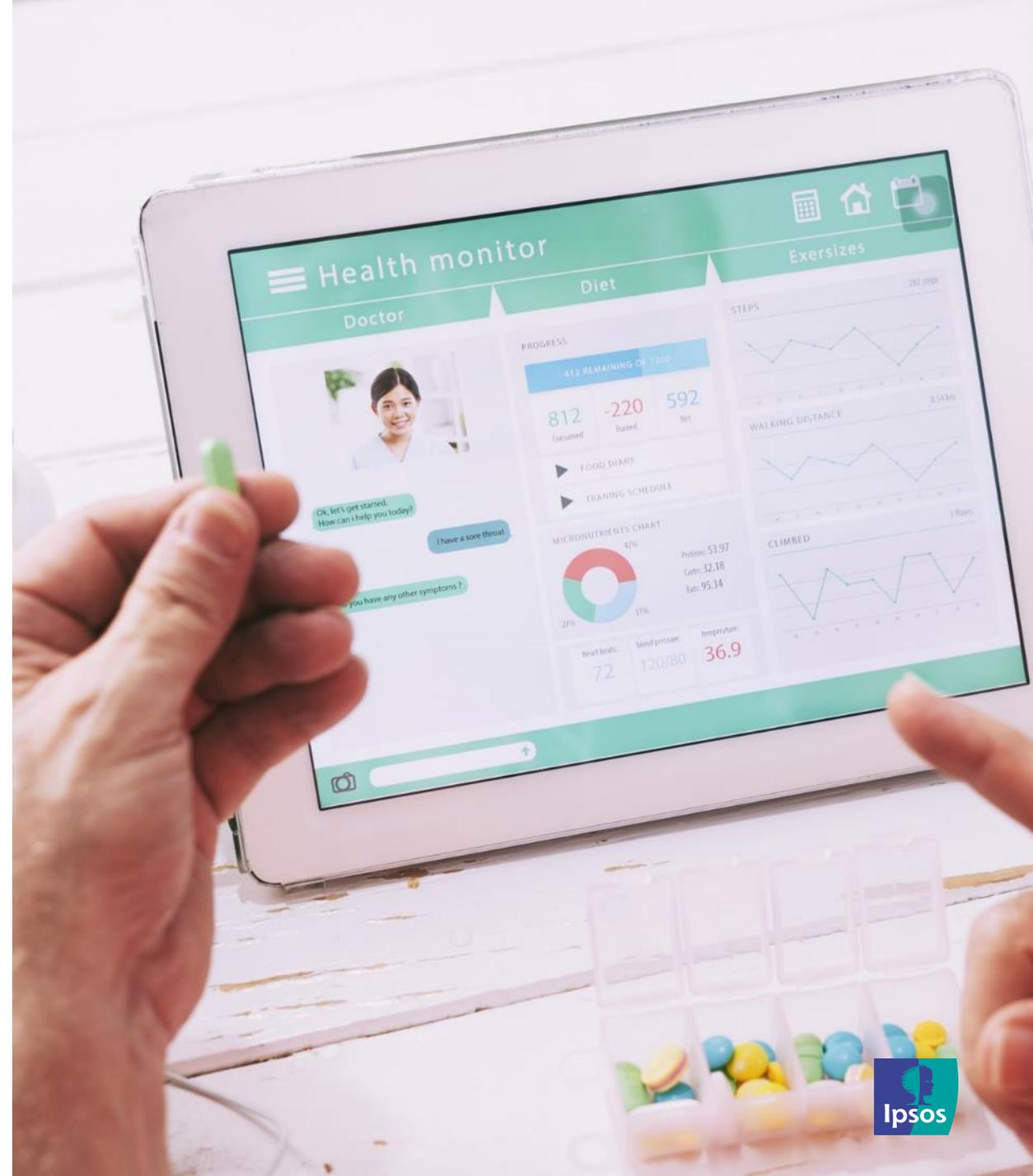
Source: Q4d. Of those connected devices that you use for professional use, what training, if any, have you received?  
Base: All respondents, China (n=146); Millennial (1980-1995) (n=339); Gen X (1965-1980) (n=584); Baby Boomer (1945-1965) (n=367)



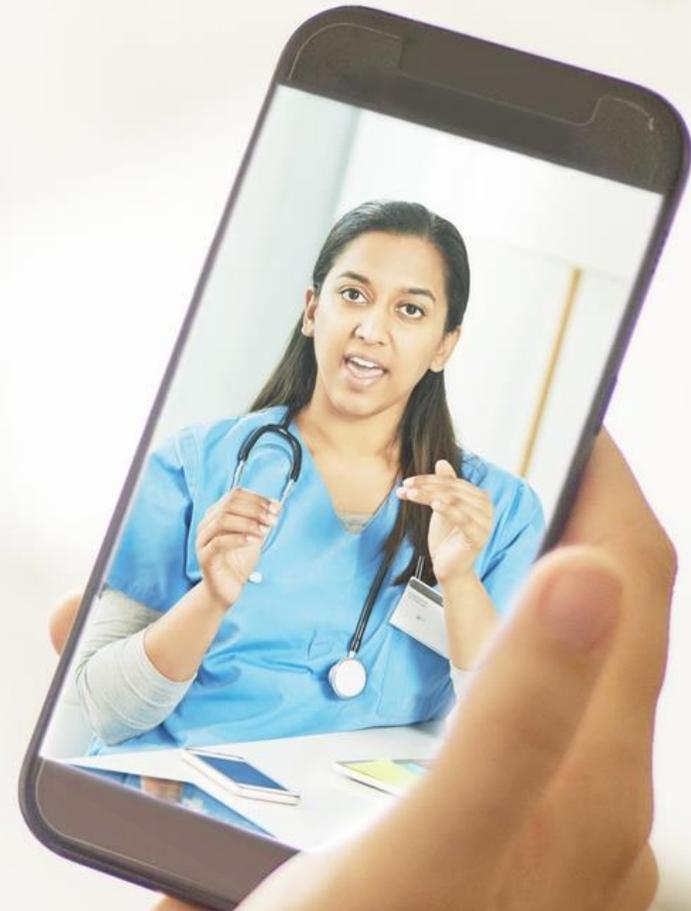
# What are digital therapeutics (DTx)?

Digital therapeutics (DTx) deliver evidence-based therapeutic interventions to patients, driven by high-quality software programs to prevent, manage, or treat a medical disorder or disease. They are used independently or together with medications, devices, or other therapies to optimize patient care and health outcomes.

<https://dtxalliance.org/>



# There is no clear consensus or understanding of digital therapeutics



**85%**

Think it's a type of technology



**62%**

Think it's a treatment or a solution

**24%**

Said they had heard of the definition before seeing in this survey



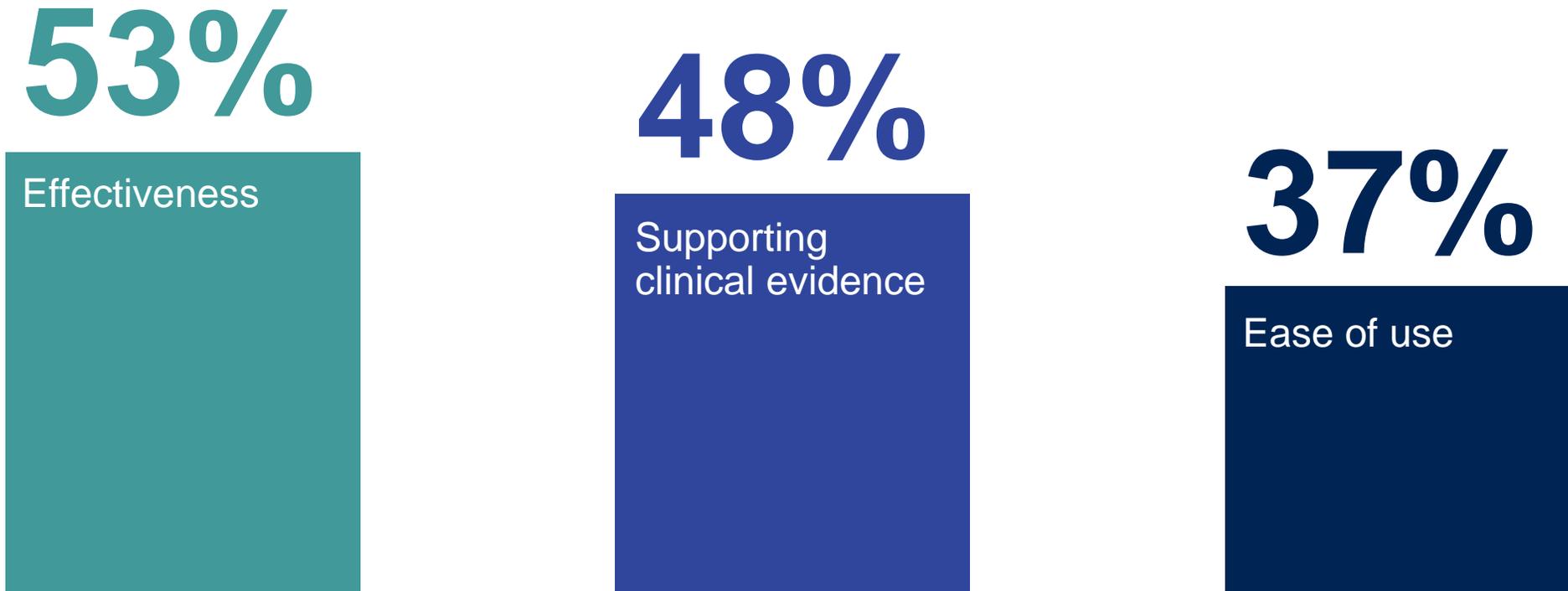
**23%**

Have prescribed a treatment that could be considered a digital therapeutic

*Digital Doctor 2020 (fieldwork November 2019–February 2020) n= 1,745 PCPs across 21 countries*

# To overcome the barriers and enable adoption of DTx in the next five years, PCPs need to see evidence and approvals

## Agreement level with statement (T2B)



Source: Q18. Which of the following, if any, would a digital therapeutic product need, for you to consider recommending and / or prescribing it?  
Base: All respondents Total (n=1745)

# In conclusion

Awareness of new technologies is fairly high, but specific knowledge in relation to healthcare is lower than expected

Connected health devices and tools are playing a key role in disease and treatment management today, and likely to grow in the future

Education is needed around what digital therapeutics (DTx) are – and the benefits – to maximise DTx uptake

# Purchase the report

## 21-country 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



Important insights into what Doctors really think about digital channels/activities, awareness and usage



Thorough understanding of the latest developments in digital and connected health



Significant logistical benefits

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

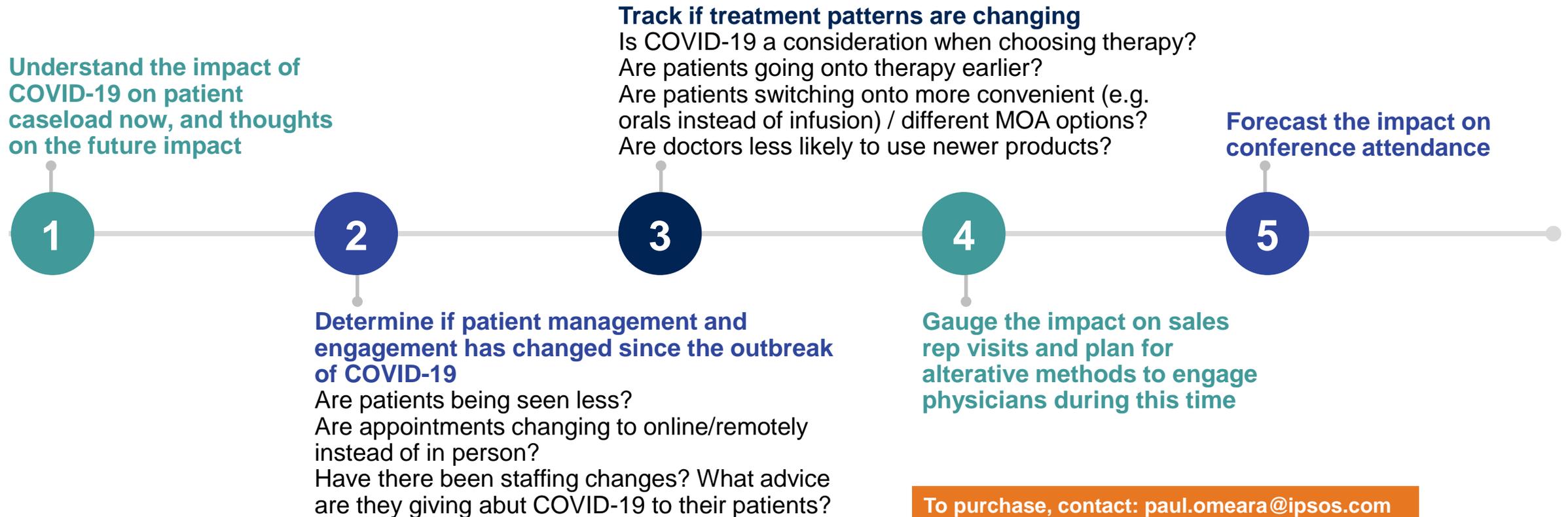
Country level reports, tailored workshops for your team and additional ad-hoc analysis also available

To purchase, contact: [reena.sanger@ipsos.com](mailto:reena.sanger@ipsos.com)



# COVID-19 Impact Studies

Ipsos' Syndicated COVID-19 Impact Study will enable clients to understand the impact of COVID-19 on the treatment of patients in a therapy area & the best way to engage with doctors during this time



To purchase, contact: [paul.omeara@ipsos.com](mailto:paul.omeara@ipsos.com)

# Expert panel



**Reena Sangar**

Global Head of Digital  
& Connected Health

**Presenter**



**Gareth Phillips**

Head of Healthcare  
EMEA

**Panelist**



**Jackie Ilacqua**

Global Head of  
Syndicated Services

**Panelist**



**Richard Tolley**

Head of Market Access  
EU

**Panelist**

# Panel Q&A



**Thank  
you.**