

Exploring the 2.0 Doctor-Patient Relationship

The Impact of New Technologies on Healthcare

Author: John Mack



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PO Box 760

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infovirsci@virsci.com

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During the few months leading up to the second *Doctors 2.0 & You* conference in May 2012, *Pharma Marketing News* and Basil Strategies—the conference organizer—co-sponsored the “Technology Impact on Healthcare” online survey. This article summarizes the survey results.

The survey asked respondents to rate the importance internet tools and services in improving healthcare today and five years from now. Respondents also were asked to evaluate the impact of new technologies on public health problems such as obesity, vaccination, and smoking and which areas of the world are most active in developing and using health-related social media, mobile apps, and online communities. Finally, respondents were asked to identify which stakeholders—government, technology companies, healthcare professionals, patients, payors—will be the major players online in 5 years.

Q: How would you rate the importance of the following internet tools and services in improving healthcare?

The choices were:

- Online patient communities
- Online healthcare professional communities
- "Traditional" forums
- Mobile apps for healthcare professionals
- Mobile apps for patients
- Online health record
- Distance consultation
- Googling to find information

The results are shown in Figure 1 (page 3).

Online Physician Communities Hold Promise, But Do They Deliver?

Over 80% of respondents said that online healthcare professional (HCP) communities were “very useful” or “essential” tools for improving healthcare. Close behind that were mobile apps for HCPs and patients. There are some differences of opinion between North American and European respondents, but it is difficult to know if these are significant. One exception, however, are opinions regarding “traditional” forums—53% of N. Amer. vs. 26% of EU respondents felt these were “very useful” or “essential.” These web-based forums date back as far as 1994. Many do not have the sophisticated social tools that are part of Web 2.0 online “communities.”

According to a QuantiaMD and Care Continuum Alliance 4,033-clinician study, only 28% of U.S. clinicians currently access online physician communities (see Figure 2, page 3).

“A notable 92% of physicians are interested in interacting with colleagues in online professional networks

to learn from experts and peers, discuss clinical issues and share practice management challenges. However, more than 70% of physicians say patient privacy issues would hold them back from using these networks, and two-thirds are worried about liability issues. Lack of time and issues with compensation are also areas of concern.”

For more about this discrepancy (highly rated importance of physician communities and actual low use of them by physicians) see “Physician Participation in Peer-to-Peer Social Media Sites: Why Is It Less Than Expected?” (<http://bit.ly/olZZfy>). Use discount code 'P2Pfree' to get it free.

Some comments from survey respondents:

“EHR will surely be crucial going forward as will MD mobile devices but it remains to be seen how large a role patient mobile apps play. Things like Googling info are important now but likely wont be down the road.” – N. Amer. HCP

“For qualitative date such as lab results, radiology reports, certain specialist reports and drugs prescribed, I think online health records are essential. As to the relationships between a HCP (primary care) and patient, I would not like to see that shared widely.” – N. Amer. HCP

“Online health records are important if the access can be secured and determined by the patient himself. As a patient I have no need for mobile apps right now, but will use them if I am sure no data will be given to the creator without my consent.” – EU patient

“Accessibility and affordability are key to making any of these options work.” – N. Amer. patient

Q: As of today, what has been the impact of the web on healthcare?

Respondents could select “Negative Impact,” “No Improvement,” “Some, Rare Improvement,” “Significant Improvement,” or “Don’t Know” when evaluating the following healthcare improvement parameters:

- Healthcare professional's own expertise
- Ability of healthcare professional to access experts
- Patient knowledge
- Patient ability to contact appropriate professionals
- Patient support system
- Professional-patient relationship
- Reducing paperwork
- Cutting Costs

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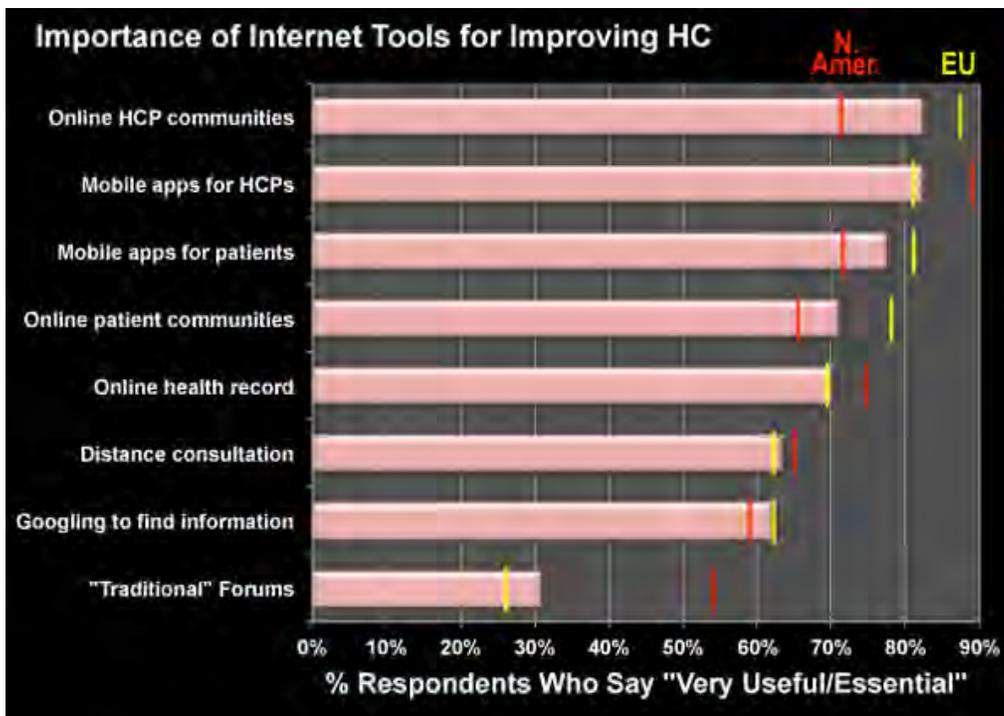


Figure 1. Rate the importance of various internet tools and services in improving healthcare. The bars show the overall results (N=77). The red vertical bars indicate responses from North American respondents (N=17) and the yellow vertical bars represent responses from European respondents (N=54).

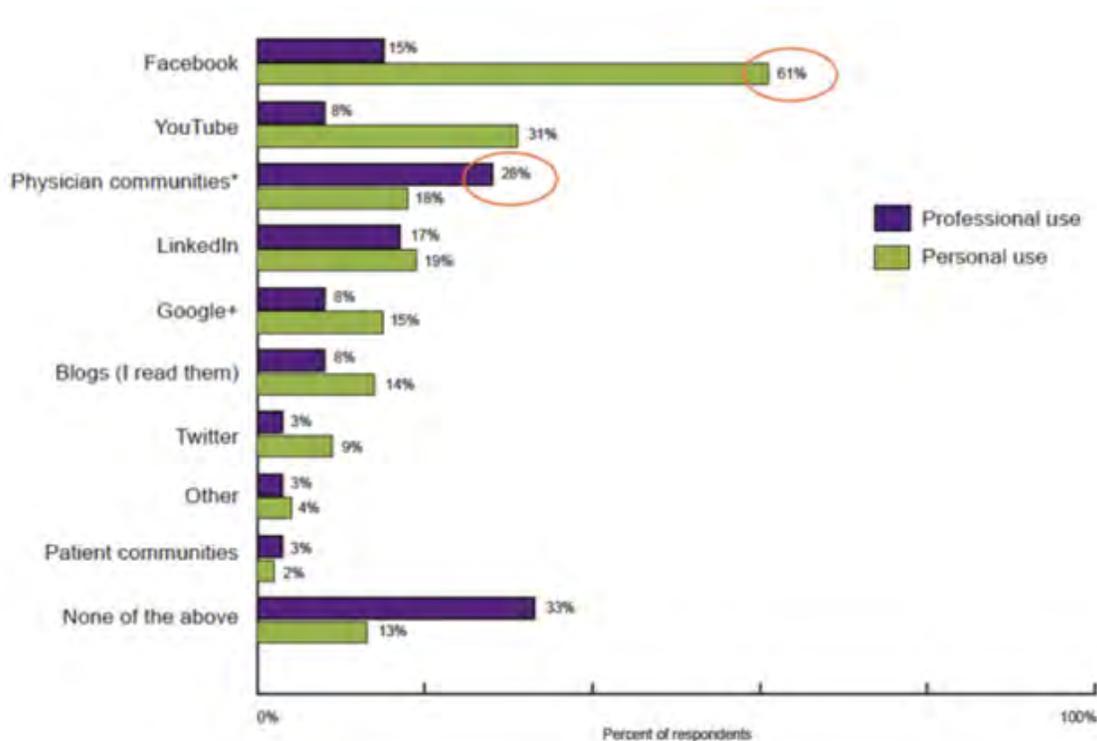


Figure 2. Only 28% of U.S. clinicians currently access online physician communities. Note: N=4032 for all responses except physician communities, which only includes respondents with no prior QuantiaMD connection (N=854). Source: QuantiaResearch www.quantiamd.com

Figure 3 (below) shows results from respondents who answered "Significant Improvement."

The only area where a majority of respondents (65.3 %) feel the web has "significantly" improved healthcare is patient knowledge. Clearly, the Web offers a treasure trove of health information. Some of this information may be inaccurate, however. To counteract that, pharmaceutical companies—in the U.S. and in Europe—are actively participating by publishing and sponsoring health content on the Web and via social media.

Nearly a majority of U.S. respondents also felt that HCP access to experts and patient support systems were also significantly impacted by the Web. Unfortunately, less than 10% of respondents felt that the Web has had a significant impact on the costs of healthcare (7% said the Web had a negative impact on costs and 40% said it had no impact; 29% said it has some/rare impact).

Q: Can new technologies impact public health problems?

Respondents were asked to what extent new technologies can impact/improve the following public health problems:

- Vaccination
- Fighting obesity
- Preventing Sexually Transmitted Diseases
- Anti-Smoking
- Compliance to Treatment

Some results are shown in Figure 4 (page 5). A high percentage (40% to 50%) of respondents agreed that new technologies have a significant potential to fight obesity, increase vaccinations, prevent STDs, and help people quit smoking. A clear majority (71%), however, feel that new technologies can tackle "treatment compliance," which is a long-standing issue that affects the bottom line of pharmaceutical companies.

As one North American pharma company respondent commented: "Social Media support groups and technology message reminders can raise awareness and help lead to more informed patients which can translate into improved public health."

Yet there have been few cases to date of pharma companies that have used technology to significantly improve medication adherence.

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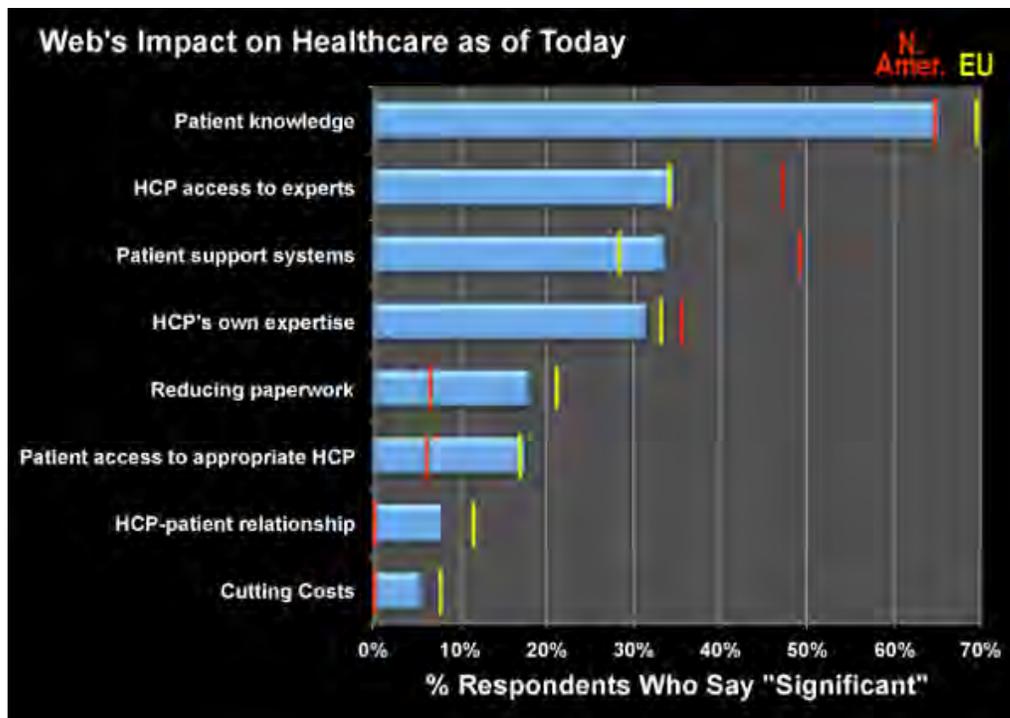


Figure 3. As of today, where has the web significantly improved healthcare? The bars show the overall results (N=76). The red vertical bars indicate responses from North American respondents (N=17) and the yellow vertical bars represent responses from European respondents (N=54).

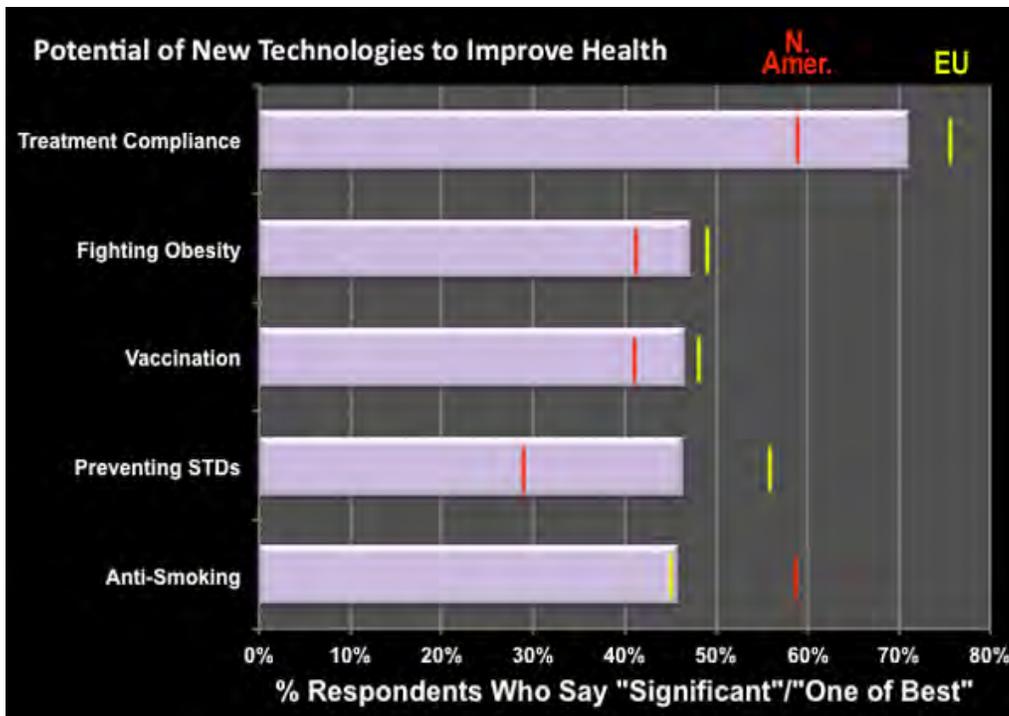


Figure 4. Potential of New Technologies to Improve Health. The bars show the overall results (N=75) where the response was “Significant” or “One of the Best”. The red vertical bars indicate responses from North American respondents (N=17) and the yellow vertical bars represent responses from European respondents (N=54).

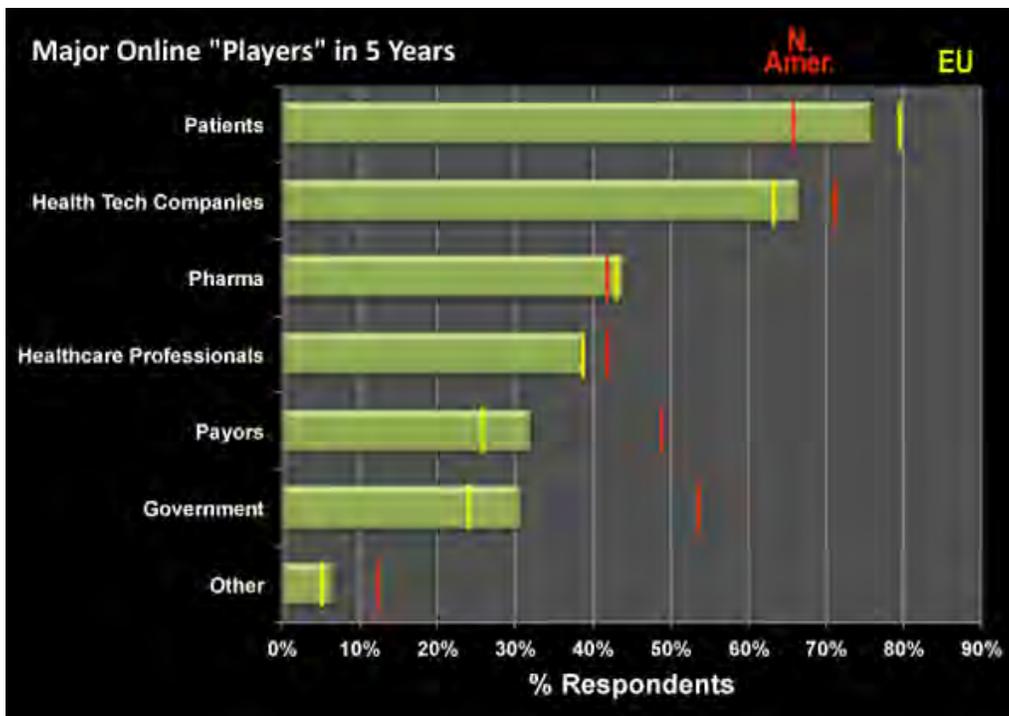


Figure 5. Major Online Players in 5 Years. Respondents were able to select up to 3 stakeholders. The bars show the overall results (N=75). The red vertical bars indicate responses from North American respondents (N=17) and the yellow vertical bars represent responses from European respondents (N=54).

What the Future Holds

Q: Who will be the major players online in 5 years?

Respondents could select up to 3 of the following stakeholders in answer to the above question:

- Government
- Health technology companies
- Patients
- Payors
- Healthcare professionals

The results are shown in Figure 5 (page 5).

A majority of respondents felt that patients and health technology companies (76% and 67%, respectively) would be major online “players” in 5 years, whereas 44% chose pharmaceutical companies.

There was a significant difference of opinion between EU and N. Amer. respondents regarding payors and government. Approximately half of North American respondents and only 25% of European respondents felt that these two stakeholders would be players online in 5 years.

A North American HCP respondent commented: “I think that Pharma and Health Tech are going to move to establish a market niche. I do not think that this will necessarily benefit patient health, however. I think that

patients will leap to these opportunities as an economical and accessible option. I think that Professionals +/- or government needs to move quickly to gain a hold on this to maintain public health mandates above profit.”

Perhaps considering the current economic realities in Europe, governments—which are also the major, if not only payors—will have less resources to compete with private industry—pharma and health technology companies—as far as investing in new health technologies. In the U.S., on the other hand, government and the insurance industry (ie, payors) may benefit from the healthcare affordability act that mandates greater use of new technologies and offers incentives.

Serious Gaming Not Seen as Growing

When asked about the growth of specific technologies impacting health in the next 5 years, a significant majority (greater than 60%) of respondents said that the use of smartphones, apps, telehealth, and online health records will still be growing five years from now. Only 49% said the same of iPads and only 33% said use of serious games in healthcare would still be growing five years from now.

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