

# COVID-19:

Ensuring a quality patient experience with the rise of digitisation in a healthcare setting.

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## FOREWORD

### ***Stefan Scheepers, Business Director of Digital Health, Mobiquity***

**“Taking a blended approach to digital health”**

The COVID-19 pandemic has caused a profound digital transformation across society. The shutting of physical premises and the implementation of strict social distancing requirements forced sectors to adopt digital solutions at unprecedented speed. In the healthcare sector, we are living in a transformational moment. COVID-19 has rapidly accelerated the adoption of digital health solutions, such as telemedicine, mobile applications and video consultations, across international healthcare structures.

Indeed, online GP appointments in the UK grew from 0.6% in 2019 to around 90% at the height of the pandemic, in the spring of 2020. Similar transformations have been seen in Germany, where the availability of video consultations in primary care has grown from 2% to nearly 60%.



Mobiquity's Digital Healthcare Report highlights how the pandemic has provided a huge incentive for change and motivated healthcare providers to adopt digital health solutions. The report shows that an overwhelming majority of European GPs, in the UK, Germany and the Netherlands, adopted digital health solutions during the pandemic. For example, in Germany, over three-quarters of GPs (89%) have used video consultations more than before COVID-19.

What is pleasing to see in our research is that overall the experience among patients who used digital tools to interact with General Practitioners (GPs)/local doctors during the COVID-19 pandemic was positive, with patients in the Netherlands (74%), Germany (68%) and the UK (64%) all reporting a positive experience.

Despite this, the findings reveal that there are still barriers to overcome when adopting digital tools as part

of healthcare practices, mainly focused around patient adoption, privacy and GP user experience.

To reduce the strain on healthcare services in the context of a global pandemic, and to provide access to care for patients that is both safe and convenient, more emphasis should be placed on creating a blended approach to improve healthcare.

In a remote world, there is just not enough capacity to satisfy the demand, so there's a requirement to go beyond telehealth calling for other, more advanced forms of digital health to be created and adopted.

As we enter a post-COVID-19 world, it is essential that we improve the patient and clinician relationship by removing the frictions that exist across the current portfolio of digital health tools, while applying strict and medically compliant engineering standards.

## LITERATURE REVIEW

The COVID-19 pandemic has forced the healthcare industry into action and removed the longstanding reticence and hesitancy in the adoption of the latest digital health technologies, in particular among GPs.

Over the past few years, there has been a growing body of evidence highlighting the value of digital health technologies for treating and managing everything from depression to obstetrics, skin cancer to Alzheimer's, but the adoption of new technologies has remained a significant challenge to overcome.

Indeed, research conducted by the EU's med-tech accelerator EIT Health prior to the pandemic revealed frustration among the start-up community at the slow pace of adoption of the latest technologies.

Historically, healthcare practitioners have been reticent to embrace digital health solutions. The potentially counterproductive impact of technology on the relationship between patients and their clinicians was cited by the Royal Society as disturbing the delicate balance of the patient-clinician relationship. This barrier has endured among many healthcare practitioners, who have eschewed digital health until recently.

In the UK, the Care Quality Commission (CQC) highlighted five key barriers to adoption in 2019. These barriers were: a lack of funding, low levels of knowledge and awareness among staff, a fear that technology could replace staff, negative perceptions towards technology among patients, and concerns about ethical and data protection implications.

The report highlights that the pandemic has provided a huge incentive for change at speed. Just as the development of the various COVID-19 vaccines have been done in double-quick time due to the eradication of much of the unnecessary aspects of the clinical trial process, so too has the pandemic removed much of the reticence and hesitancy in the adoption of the latest digital health technologies.

One of the most notable outcomes from the introduction of the new Digitale-Versorgung-Gesetz in Germany has been the creation of an accelerated regulatory path for companies to bring their digital health applications to market. The process ensures that as soon as apps are added to the central registry, they can subsequently be prescribed by physicians and be reimbursed by all of the statutory health insurance providers operating in the country.





## CHANGING PERCEPTIONS

Perceptions towards digital health solutions, however, have been changing. For instance, research from the University of Warwick illustrates growing support among both doctors and patients for telehealth technologies. The research examined a number of studies dating back to 2010 to explore the changing perceptions towards video consultations. The results reveal that there is growing support for video consultations among both constituents, but that there are clear differences in terms of the type of consultations conducted.

For instance, there was consistently high support for using video consultations for routine consultations, but less robust support for the technology when supporting patients with long-term conditions. There have also been clear divisions among different age groups in terms of acceptance of telehealth technology. Research from the University of California, San Francisco showed that both younger patients and doctors were confident that telehealth would play a growing role in the future of their health care, not least to the high levels of convenience video consultations afford.

For older patients, however, the situation is somewhat more complicated, with a second study from the same university showing that they were more willing to use video technology if they already had a relationship with their doctor, but were very uneasy about having an initial consultation virtually. There were also challenges raised in terms of both the internet connectivity required to successfully conduct a video consultation and the requisite hardware to perform the call. This has led doctors to voice concern that health inequalities may emerge as patients become locked out of the care they so urgently need.

## DATA PROTECTION

The issue of data protection is an important one. The security of data is likely to play a big role in the long-term acceptance of digital health technologies, such as mobile applications.

Researchers from the University of Edinburgh suggest that patients are generally accepting of their medical data being used so long as it goes to medical research rather than commercial gain. This is evidenced in the considerable rise in usage of digital applications across Europe. In the UK, the National Health Service's COVID-19 app recorded a 111% increase in downloads in March alone. This level of uptake corroborates the idea that patients are willing to provide medical data for medical research and the 'greater good.'

From the doctors perspective, analysis of the UK primary care market by Harvard University shows that healthcare practitioners are confident that new medical technologies entering the market will provide valuable additions to the services they offer.

## REPUTATIONAL HURDLE TOWARDS TECH ADOPTION

A significant hurdle towards harnessing the benefits of digital tools, especially around video consultations and examinations, has been an issue surrounding due diligence by doctors to make the best clinical decision with the appropriate use of technology. During COVID-19 it has become apparent in the number of rising cases around misdiagnosis of cancer due to the limitations of remote consultations. For example, there have been instances around doctors not identifying cancer symptoms at an early stage or misdiagnosis informed by a video examination.

## CONCLUSIONS

### COVID-19 INCREASES USE OF DIGITAL TOOLS IN HEALTHCARE

Prior to COVID-19, it is clear that there was some adoption of digital technologies among clinicians, however, the pandemic has greatly accelerated the reliance on technology for healthcare amid health concerns surrounding the risk of coronavirus infection.

Interestingly, our research demonstrates that despite the popular belief ingrained within the medical community that GPs are adverse to new technologies that disturb the patient and doctor relationship, our research shows that GPs are actively embracing digital tools to improve patient care in COVID-19.

### TOP DIGITAL TOOLS BEING ADOPTED BY GPs

Across the UK, Germany and the Netherlands, GPs increased their adoption of digital technologies during the COVID-19 pandemic. GPs were using the following digital tools more than before COVID-19:



- Germany: Remote monitoring (81%), video consultations (89%) and video examinations (87%)



- UK: Video consultations (55%) and video examinations (52%)



- Netherlands: Applications (47%)

### GPs ARE USING DIGITAL TOOLS MOST FREQUENTLY FOR THE FOLLOWING SCENARIOS:

#### Patient consultations

The UK is leading overall in using digital tools for patient consultations with over half (56%) of UK GPs doing so. Whereas over 4 in 10 (43%) German GPs and Dutch GPs (41%) are using digital tools for patient consultations.

#### Remote monitoring

The Netherlands is the country with the highest incidence of GPs using digital tools for remote monitoring with 3 in 5 (60%) GPs doing so. Over two-thirds (36%) of UK GPs and over half of German GPs (55%) are using digital tools for this capability.

#### Prescribing medicine

Nearly half of GPs in the UK (49%) and the Netherlands (49%) are using digital tools for prescribing medicine. In Germany, this is more than a third (35%) of GPs.

### GERMANY FASTEST COUNTRY TO ADOPT DIGITAL TECHNOLOGY

Our data shows that Germany is at the forefront technological adoption in healthcare during the COVID-19 pandemic. Over three-quarters of German GPs reported that COVID-19 accelerated their adoption of remote monitoring (78%), video consultations (86%), and video examinations (83%)

Meanwhile, in the UK, almost half of GPs reported that COVID-19 accelerated their adoption of remote monitoring (48%) and video examinations (48%). Over 2 in 5 Dutch GPs reported that COVID-19 accelerated their adoption of remote monitoring (53%), video consultations (41%) and video examinations (46%).

## SENTIMENT TOWARDS DIGITAL TOOLS

Despite the enthusiasm of GPs to adopt digital technologies, the overwhelming majority of patients, however, did not use digital healthcare tools, highlighting a potential barrier to adoption. Interestingly, digital tools were most widely used by patients in the UK. Over a quarter (27%) used video consultations during COVID-19 and a quarter (25%) used telemedicine services.

Among the digital tools used by patients, applications were used the most across all three countries during COVID-19. Almost a third of patients in the UK (32%) and over 1 in 10 patients in Germany (17%) and Netherlands (17%) used healthcare applications.

## POSITIVE EXPERIENCES CITED AMONG PATIENTS WHO USED DIGITAL TOOLS

Despite digital health usage remaining relatively low among patients surveyed, those patients who did use digital health tools had a positive experience with them. Patients in the UK had the best experiences with remote monitoring (40%) and wearable tech (44%).

In Germany, remote monitoring (40%), wearable tech and telemedicine (32%) were cited as having positive experiences. In the Netherlands, video examinations (45%) and wearable tech (44%) were ranked the highest.

For patients who used digital tools, levels of comfort were high across all countries. This highlights that while there is initial reticence towards digital health solutions among patients, once used, patients have a positive experience and outlook towards engaging with digital tools.

## IMPROVEMENTS NEEDED IN VIDEO EXAMINATIONS AND REMOTE MONITORING

Meanwhile, there is still work to be done with video examinations which was the worst ranked digital tool for the UK (59%) and Netherlands (53%) in relation to levels of comfort. In Germany the least popular digital tool was remote monitoring (55%).



# Ensuring a quality patient experience with the rise of digitisation in a healthcare setting

Mobiquity's survey of 3,009 patients who saw or spoke to their doctor during COVID-19 and 301 GPs/local doctors who consulted patients during COVID-19 across the UK, Germany, and the Netherlands shows:

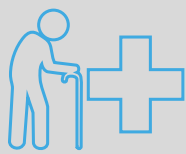
## Patients cited a positive experience during the COVID-19 pandemic:



**74%** Netherlands

**68%** Germany

**64%** UK

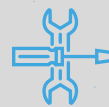


## Older patients in the UK and the Netherlands that

### used digital tools during COVID-19 are having a positive experience:

In the **UK**, half of patients over the age of 55 had a **better experience** with **remote monitoring (50%)** and **video examinations (50%)** than in-person consultations

In the **Netherlands**, 3 in 5 patients over the age of 55 (**60%**) had a **better experience with video examinations** than in-person consultations



## High levels of comfort when using digital tools:



### UK

**72%** Wearable tech

**69%** Telemedicine and Applications

**68%** Video consultations

**67%** Remote monitoring



### Germany

**72%** Applications

**69%** Wearable tech

**67%** Video consultations

**62%** Video examinations

**60%** Telemedicine



### Netherlands

**64%** Telemedicine

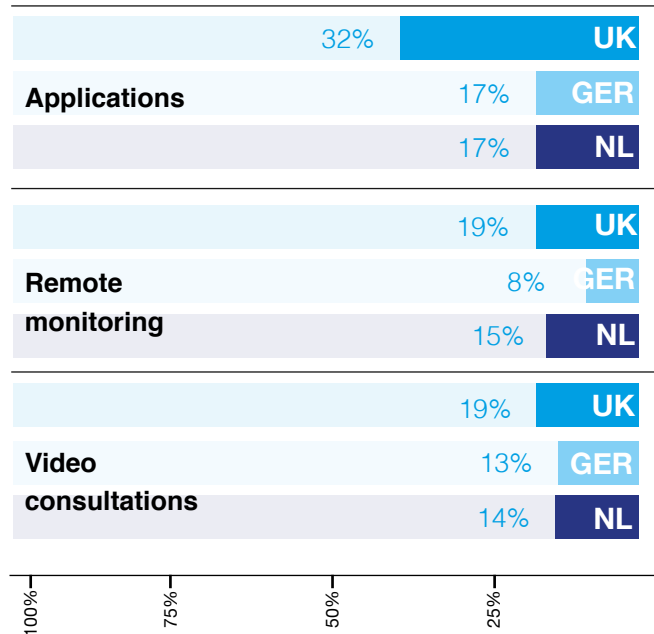
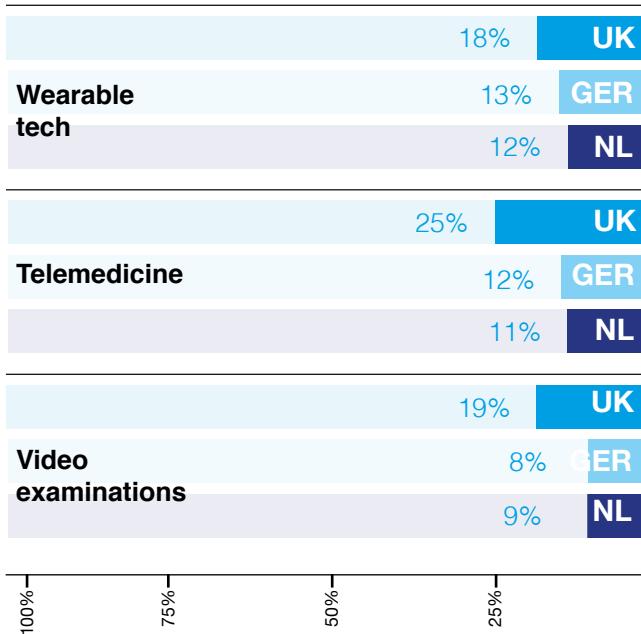
**63%** Applications

**59%** Wearable tech

**57%** Remote monitoring



## Top digital tools **most used by patients:**



## Top digital tools **adopted by GPs during COVID-19:**

### UK



**55%** Video consultations



**52%** Video examinations

### Germany



**81%** Remote monitoring



**89%** Video consultations



**87%** Video examinations

### Netherlands



**47%** Applications



Patients said that digital tools led to quicker access to their doctor

34%

Netherlands

41%

Germany

51%

UK



GPs found it easier to prescribe treatment with the following digital tools:

Applications

28%

Netherlands

Video consultations

30%

Germany

Applications

35%

UK



Patients still prefer in-person consultations in the future

81%

Netherlands

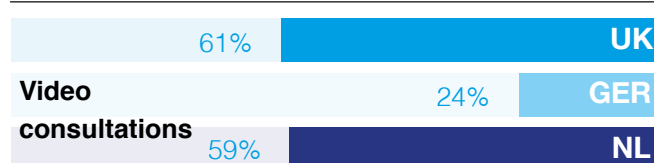
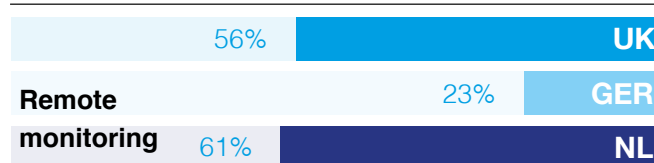
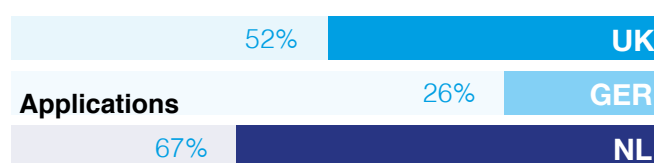
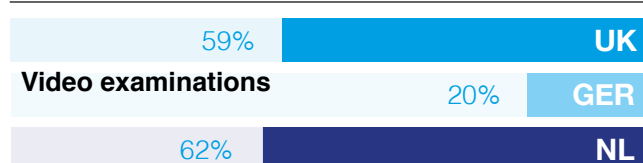
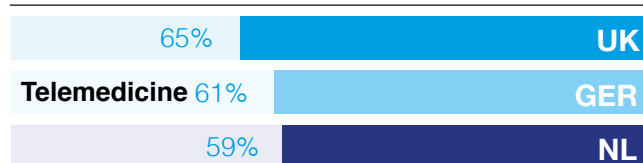
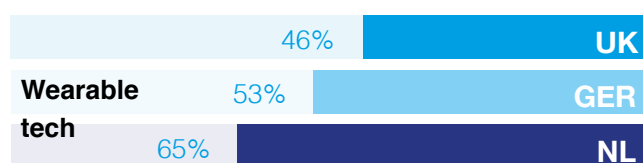
78%

Germany

64%

UK

## Barrier to adoption: GPs cite technical issues while using the following digital tools



**GPs believe that technology will be important in the future to remove frictions in patient experience.**



All **German** GPs (100%) believe that **remote monitoring** and **video examinations** will be very important or somewhat important to the future of medicine



Over 8 in 10 **UK** GPs believe that **remote monitoring** (87%), **video examinations** (84%), and **applications** (82%) will be very important or somewhat important to the future of medicine.



Over 8 in 10 **Dutch** GPs believe that **applications** (83%) will be very important or somewhat important to the future of medicine.

**GPs across the UK, Netherlands and Germany would overcome the challenges associated with remote assessments by innovating with digital technologies.**



**German** GPs (24%) would innovate with **digital technology** for **interpreting findings**.



**UK** GPs (32%) and **Dutch** GPs (29%) would innovate with **digital technology** to **monitor the patient's condition**.



## KEY BENEFITS OF DIGITAL TOOLS

The main benefit cited by patients in the UK, Germany and the Netherlands was that digital health tools resulted in quicker access to their GP than normal.

- More than half (51%) of UK patients, who used digital tools, said that digital tools led to quicker access
- 2 in 5 (41%) of German patients, who used digital tools, said that digital tools led to quicker access
- Over a third of Dutch patients (34%), who used digital tools, felt that digital tools led to quicker access

## TOP DIGITAL TOOLS BEING ADOPTED BY GPs

For GPs, the findings show that one of the main benefits of digital tools on the patient experience was the ability to prescribe appropriate treatment more easily.

- Over a quarter of UK GPs reported that remote monitoring (27%), video consultations (26%), video examinations (27%), and applications (35%) made it easier to prescribe the appropriate treatment
- Almost a third of German GPs reported that remote monitoring (28%), telemedicine (27%), video consultations (30%), video examinations (28%), and wearable tech (29%) made it easier to prescribe the appropriate treatment
- Over a quarter of Dutch GPs said that telemedicine (27%) and applications (28%) made it easier to prescribe the appropriate treatment

Other benefits highlighted include: Reduction in waiting times, improved communication with patients, reduction in house calls, a better standard of healthcare, more patients were seen, more time was spent with patients, appointments could be rescheduled more easily and patients were happier.

- Over a third (35%) of UK GPs reported that using digital tools in healthcare led to a reduction in patient waiting time
- Over a quarter of UK GPs reported that it was easier to reschedule appointments (30%), more patients were seen (28%), more time was spent with patients (27%), it was easier to communicate with patients (27%), and patients were happier (26%)
- More than 3 in 10 German GPs have reported that digital tools in healthcare have enabled them to have more time with patients (34%), communicate easier with patients (33%), reduce patient waiting times (32%), and reduce in house calls (30%)
- Almost a third of Dutch GPs report that digital tools in healthcare have made it easier to communicate with patients (31%), provide a better standard of healthcare (31%), and reduce in house calls (30%)

# BARRIERS TO THE ADOPTION OF DIGITAL TOOLS IN HEALTHCARE

The survey highlights the main barriers towards the adoption of digital technologies in healthcare.

## IN-PERSON STILL PREFERRED

In the future, an overwhelming majority of patients in the UK, Germany and the Netherlands would still prefer in-person consultations, as opposed to digital health solutions. Interestingly, the UK has the lowest preference towards in-person consultations in the future.

- Almost two-thirds (64%) of UK patients would prefer in-person consultations in the future, compared to digital tools
- Over three-quarters (78%) of German patients would prefer in-person consultations in the future, compared to digital tools
- 8 in 10 (81%) Dutch patients would prefer in-person consultations in the future, compared to digital tools

## PRIVACY CONCERNS

Patients are concerned about being monitored and have privacy concerns while using digital tools, for example, wearable technology and mobile applications:

### UK

- A third (33%) of UK patients are concerned about using wearable tech as they do not want to be monitored
- Less than a quarter (16%) of UK patients are concerned about using wearable tech for privacy reasons

### Germany

- Nearly half (46%) of German patients are concerned about using wearable tech as they do not want to be monitored
- Over a third (34%) of German patients are concerned about using wearable tech for privacy reasons

### Netherlands

- Almost a third (32%) of Dutch patients are concerned about using wearable tech as they do not want to be monitored
- A quarter (26%) of Dutch patients are concerned about using wearable tech for privacy reasons



## TECHNICAL ISSUES

For GPs, the main barrier to adoption was around technical issues while using digital tools.

### UK

- Over half of UK GPs have experienced technical issues with remote monitoring (56%), telemedicine (65%), video consultations (61%), video examinations (59%), applications (52%), and wearable tech (46%)

### Germany

- Almost a quarter of German GPs have experienced technical issues with remote monitoring (23%), video consultations (24%), applications (26%), and video examinations (20%), while more than half of German GPs experienced technical issues with telemedicine (61%) and wearable tech (53%)

### Netherlands

- Over 3 in 5 Dutch GPs have experienced technical issues with remote monitoring (61%), video examinations (62%), applications (67%), and wearable tech (65%), while nearly 3 in 5 Dutch GPs experienced technical issues with telemedicine (59%) and video consultations (59%)

## 'WAIT AND SEE' APPROACH

In addition, when pressed on how they would overcome challenges associated with remote assessment, a worrying number of GPs in all three countries would adopt a 'wait and see' approach to monitoring a patient's condition. A third (32%) of UK GPs would overcome challenges associated with monitoring a patient's condition by adopting a wait and see approach. This was less than 1 in 5 (15%) of German GPs and a quarter (25%) of Dutch GPs who would take this approach.

## HIGH LIKELIHOOD OF DIGITAL ADOPTION IN THE FUTURE OF HEALTHCARE

Based on the findings, the sentiment around digital tools suggests a high likelihood of adoption among GPs and patients in the future.

GPs across the UK, Netherlands and Germany would overcome the challenges associated with remote assessments by innovating with digital technologies. Almost a quarter of GPs in Germany (24%) would innovate with digital technology for interpreting findings. Almost a third (32%) of GPs in the UK and over a quarter (29%) of GPs in the Netherlands would innovate with digital technology to monitor the patient's condition.

## ADOPTION OF TECH HIGHEST IN GERMANY AMONG DOCTORS

German GPs are leading the way in embracing digital tools in the future of healthcare. Almost all German GPs are very likely or somewhat likely to adopt remote monitoring (96%), video consultations (97%), video examinations (96%), and applications (87%) as part of their healthcare practice. Meanwhile, all German GPs (100%) believe that remote monitoring and video examinations will be very important or somewhat important to the future of medicine.

This is closely followed by the UK and the Netherlands. Over three-quarters of UK GPs believe that remote monitoring (87%), telemedicine (76%), video consultations (79%), video examinations (84%), applications (82%), and wearable tech (76%) will be very important or somewhat important.

Over three-quarters of Dutch GPs believe that remote monitoring (75%), telemedicine (78%), video consultations (78%), video examinations (71%), applications (83%), and wearable tech (71%) will be very important or somewhat important.



## HALF OF OLDER PATIENTS PREFER DIGITAL TOOLS OVER IN-PERSON CONSULTATIONS

However, among the patients that engaged with digital tools during COVID-19, it was surprising to see that older patients in the UK and the Netherlands had better experiences with digital tools than in-person consultations. Half of 55+ year old patients had a better experience with remote monitoring (50%) and video examinations (50%) than in-person consultations in the UK. In the Netherlands, 3 in 5 patients over the age of 55 (60%) had a better experience with video examinations than in-person consultations.

## MOST FAVOURED DIGITAL TOOLS BY PATIENTS

In the future, patients in the UK, Germany and the Netherlands would consider using remote consultations following their experience during COVID-19.

Over half (51%) of UK patients would consider using remote consultations in the future after their experience during COVID-19, but less than a third of UK patients would consider remote monitoring (31%), telemedicine (28%), or remote examinations (30%).

More than 2 in 5 (42%) German patients would consider using remote consultations in the future, but less than a quarter would consider using remote monitoring (20%), remote examinations (18%) or telemedicine (24%)

Almost half of Dutch patients (45%) would consider using remote consultations in the future, but only a quarter (25%) would consider using remote monitoring.

## CONFIDENCE AROUND PROTECTION OF DATA

Although privacy and monitoring were a concern, a majority of patients in the UK, Germany and the Netherlands were confident that their data was protected while using digital healthcare tools.

The research suggests that patients are willing to accept their data being used for digital healthcare tools and are confident that it is protected:

- Over 4 in 5 (82%) patients in the UK were either somewhat or very confident that their data was protected when using digital tools
- More than 3 in 5 (62%) German patients were either somewhat or very confident that their data was protected when using digital tools
- 3 in 4 (75%) Dutch patients were either somewhat or very confident that their data was protected when using digital tools



## RECOMMENDATIONS

### THE IMPORTANCE OF BLENDED CARE

The COVID-19 pandemic has accelerated the digitisation of healthcare. Our report shows that while the majority of patients have not used digital tools during the pandemic, those who have experienced digital tools saw the benefits.

Indeed, in the future, patients and practitioners are heading in the same direction when it comes to digital tools, albeit at different adoption rates. It is clear from our data that local doctors understand the importance of digital healthcare technologies for improving patient outcomes, with Germany as a key territory in driving technological innovation to improve patient experiences.

At the same time, our report highlights the issues of a technological infrastructure established prior to the pandemic, and barriers towards the adoption of digital tools among doctors and patients.

As a way of delivering a better standard of patient care, healthcare practitioners need to take a blended approach, using digital and physical touchpoints, reducing the pressure on local doctors across the world.

For this to be achieved, there is a great opportunity for technology companies to support healthcare services by making digital tools more accessible to patients and doctors alike.

A blended approach will remove the risks around misdiagnosis and the delays for patients receiving the appropriate treatment.

### NAVIGATING REGULATORY MED-TECH HURDLES

To overcome patient's fears around privacy, healthcare technology providers need to understand the risks around developing new technology for patient care and treatment. Companies must be aware of data collection regulations, such as GDPR, to mitigate and de-risk the potential for data breaches.

During the COVID-19 pandemic, governments relaxed the rules around data sharing and it is critical that organisations safeguard patient data to prevent the next big data breach in the interests of their safety and security.

Finally, healthcare providers need to align with Medical Devices Regulation (MDR) to ensure that digital tools achieve compliance across all regulatory requirements.

### EMBRACING THE BENEFITS OF DIGITAL HEALTHCARE BY OVERCOMING SOCIETAL BARRIERS

Societal barriers will also be a challenge for driving digital adoption in healthcare. It is essential that patients have access to the latest technological infrastructure, such as 5G and fibre broadband, to support and enable a seamless experience when accessing digital healthcare services. This will improve their interaction with their GP and the patient outcome.

At the same time, technology companies, governments and healthcare providers across the world must work together to educate patients on the benefits of digital tools while reassuring them on the way in which their data is managed.

## VIEWPOINT FROM THE INDUSTRY

### Professor John Powell, University of Oxford



Over the last decade, digital health has emerged as a key area for health services in the UK and internationally. The digital revolution in healthcare has the potential to reduce inefficiencies in healthcare delivery, improve access, increase equity and quality, and deliver more

patient-centred care. Digital technology can support cheaper, remote care, away from expensive care settings, while being highly scalable and also low in carbon emissions. Harnessing digital health technology is therefore a key priority for healthcare systems across the world which face the demands of ageing populations, living longer with increasing prevalence of chronic disease, with ever more limited resources. Yet the health sector has often been slow to adopt digital solutions, and these innovations have not, to date, been as disruptive as they have in other consumer-facing sectors such as travel or retail.

As the authors of this report note, the restrictions of the COVID-19 pandemic have provided the impetus and opportunity for the rapid uptake of digital health solutions, especially video consultations and remote monitoring, in primary care. Capturing the views of practitioners and patients on this transformation is vital in understanding the issues that influence successful adoption, scale-up and sustainability. This report builds on an emerging evidence base on the views and experiences of patients and clinicians using digital tools in primary care. The finding that many patients reported positive experiences of using digital services, particularly in terms of accessibility and

convenience, supports work from before the pandemic, in particular showing that patients and clinicians are generally satisfied with video consultations. The report also echoes findings of other studies in identifying technical problems as one of the main barriers to use, alongside privacy concerns. Those implementing digital solutions in primary care settings need to take note of these challenges, and address them. It is encouraging that the great majority of GPs who took part in the survey were enthusiastic and recognised the importance of the further digital transformation of their services. The findings need to be interpreted in light of the coronavirus pandemic, and the associated requirements to minimise in-person contact. Many patients still expressed a preference for in-person consultations if available. Again, this supports previous work showing that while digital solutions may have benefits in some circumstances, such as for those with work commitments or because of mobility or mental health problems, in other circumstances face to face care is preferred.

As the report recommends, a blended approach may present the optimum direction for the future, harnessing the best aspects of digital technology in terms of accessibility, convenience and reduced cost, where appropriate, while retaining the essential elements of face-to-face care when needed. As we emerge from the COVID-19 pandemic, it will be important to capture the lessons learned from the rapid shift to remote ways of working in primary care, and to continue to use digital tools where they deliver benefit to patients and health systems.

***Professor John Powell is a public health physician and health services researcher at the University of Oxford who has been studying the use of digital technologies in health care for over 20 years.***





## **ABOUT THE RESEARCH**

The research was conducted by Censuswide, with 3,310 respondents in total across 2 surveys; 301 GPs/local doctors in the UK, in Germany, in Netherlands and 3,009 respondents who have seen or spoken to a GP in the UK, in Netherlands and Germany. Both surveys ran between 13.11.2020-23.11.2020. Censuswide abide by and employ members of the Market Research Society which is based on the ESOMAR principles.

## **ABOUT CENSUSWIDE**

Censuswide is a full service research agency that delivers both quantitative and qualitative research. It has access to a range of different demographics ranging from general consumers to C-Suites across 60+ global markets. Censuswide abide by and employ members of the Market Research Society. All survey panellists are double opted in (with an opt-in and validation process) in line with MRS and ESOMAR standards.

## **ABOUT MOBIQUITY**

Mobiquity is a full-service digital transformation enabler that delivers compelling digital products and services that serve a purpose, by blending strategy, creative and engineering. We apply a sector agnostic approach to human centered innovation applied with in-depth industry expertise.

Founded in 2011 with a focus on mobile technology solutions, Mobiquity has adapted to client needs across 9 different geographical locations, providing end-to-end omnichannel digital services to leading B2B and B2C brands.

Mobiquity's global team of 800+ employees serves over 100 million users every day. The company takes shared ownership and accountability throughout the entire clients' project life cycle, enabling digital transformation success.

Mobiquity has extensive experience in working for all relevant stakeholders in Healthcare, and is committed to accelerating the transformation of healthcare by putting people in charge of their own health enabled by human centered innovation.

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