Ipsos Healthcare

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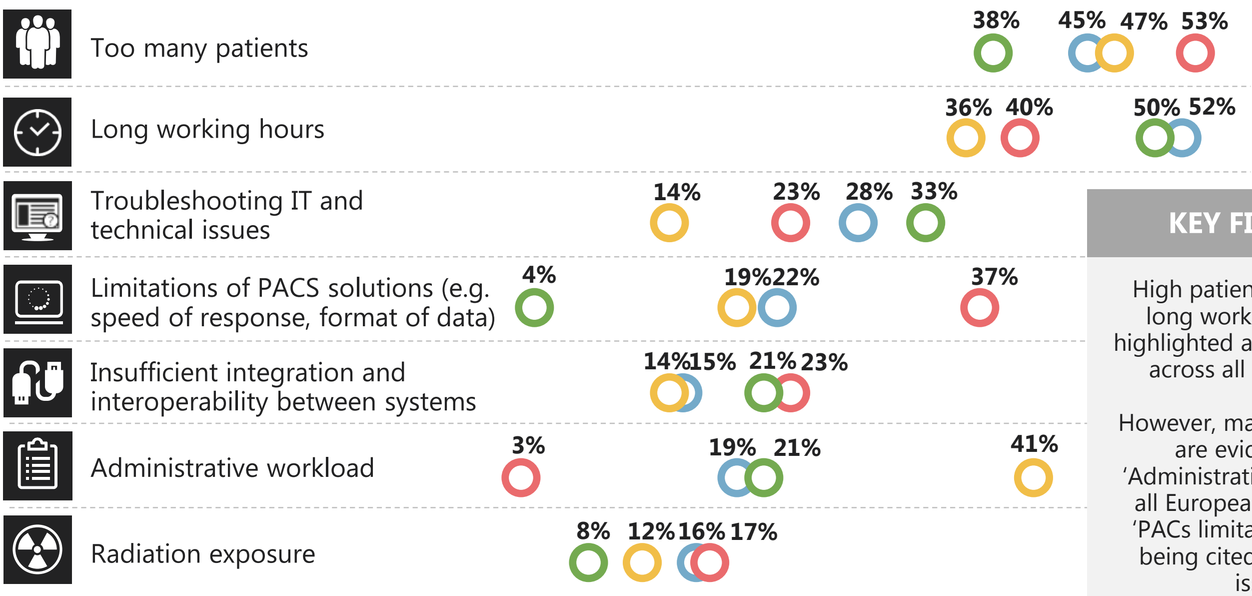
Ipsos MD&D Pulse Survey

RADIOLOGY

August 2017

USA EUROPE CHINA BRAZIL

The current challenges faced by a Radiologist



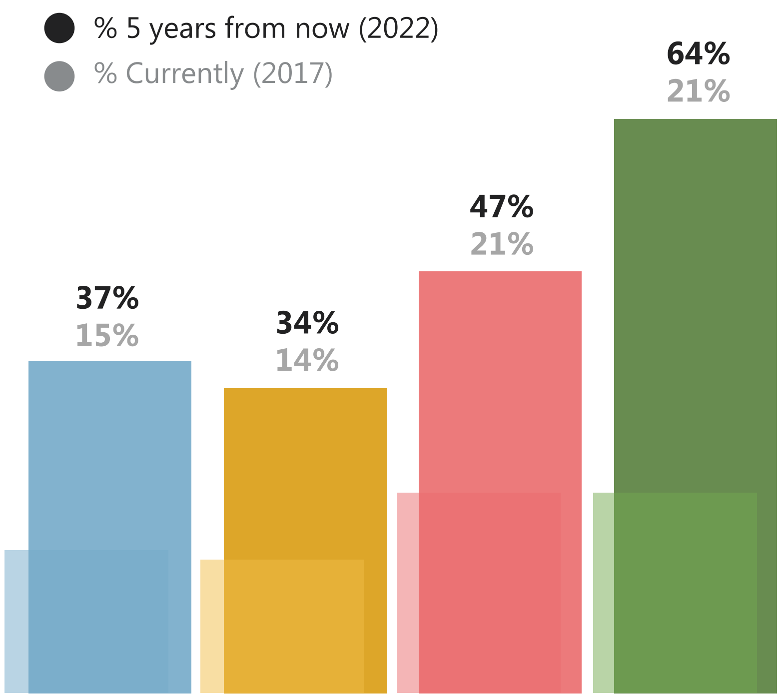
KEY FINDINGS

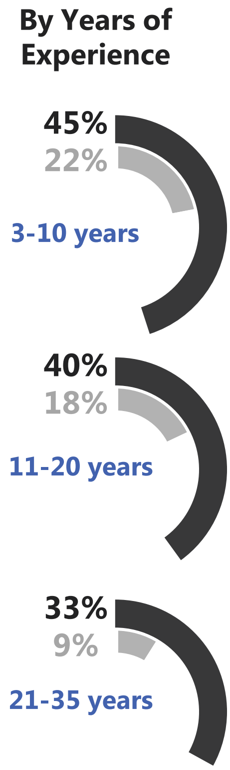
High patient volumes and long working hours are highlighted as key challenges across all geographies.

However, market differences are evident – with 'Administrative workload' in all European markets and 'PACs limitations' in China being cited as additional issues.

Respondents were asked to rank 7 prelisted challenges in order from 1 to 7 (1 being the biggest challenge, 2 the 2nd biggest, etc.)
Figures show the combined percentage of those ranking the challenge 1st or 2nd.

% of post-imaging processing/analysis done in the cloud





KEY FINDINGS

Radiologists foresee that the amount of cloud-based post imaging processing / analysis will **more than double over the next 5 years.**

Current cloud-based activity, as well as future usage projections, are higher amongst radiologists at the beginning of their career vs. those with more experience.

GLOBAL

245 practicing radiologists from 8 selected markets were invited at random to take part in a **5 min survey consisting of 10 structured questions (fielded in local languages).**
All data was collected via an online survey over a 5 day period in July 2017.

Base: (Radiologists): USA n=67, Europe n=124 (UK n=17, FR n=25, DE n=35, ES n=20, IT n=27), China n=30, Brazil n=24

Base: (Radiologists): 3-10 years in practice n=72, 11-20 years n=94, 21-35 years n=78

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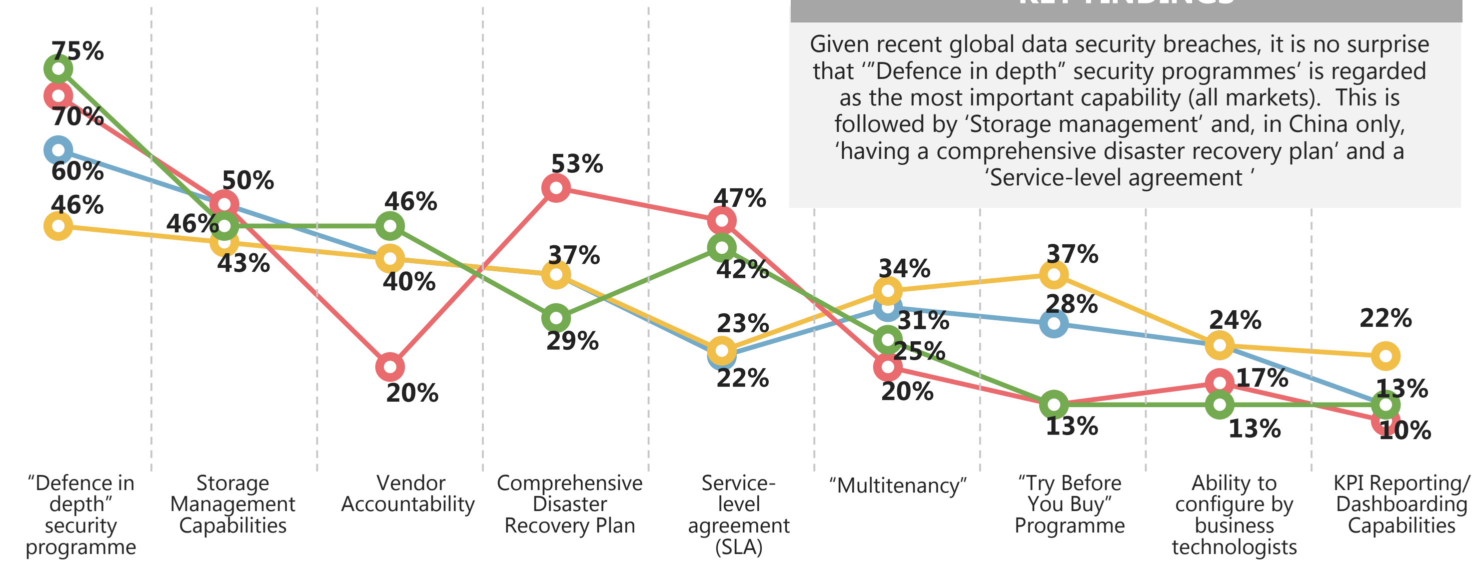
Key vendor capabilities when deploying a cloud-based clinical application

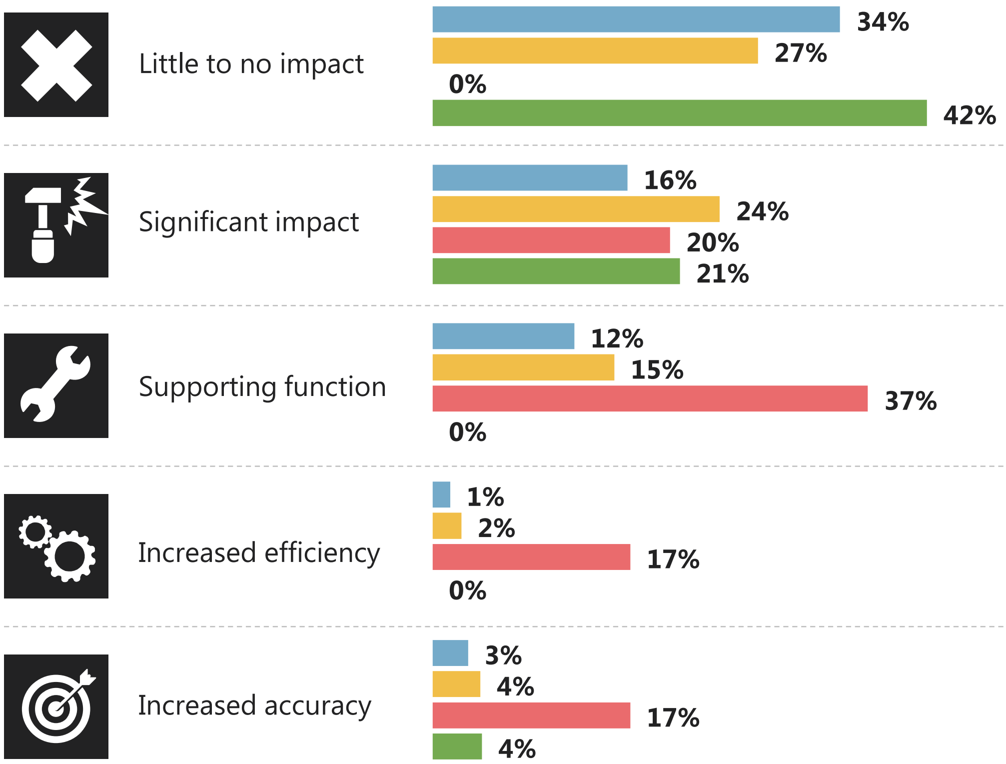
KEY FINDINGS

Given recent global data security breaches, it is no surprise that '"Defence in depth" security programmes' is regarded as the most important capability (all markets). This is followed by 'Storage management' and, in China only, 'having a comprehensive disaster recovery plan' and a 'Service-level agreement '



*Respondents were asked to rank 9 prelisted capabilities in order from 1 to 7 (with 1 being the most important, 2 the 2nd most important, etc. Figures show the combined percentage of those ranking the capability 1st, 2nd or 3rd.

Perceived impact of Artificial Intelligence
(in 5 years)*



KEY FINDINGS

All markets except China tend to believe that **AI will have 'little to no impact'**, possibly because 5 years is too early for real tech advancement or because they are trying to reassure themselves that their roles are not threatened.

China is most receptive to using AI, which respondents see as a supporting function that will increase efficiency & accuracy.

*Question was open ended

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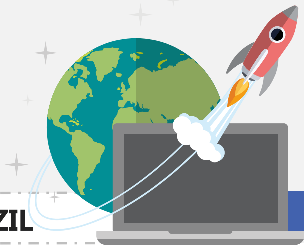

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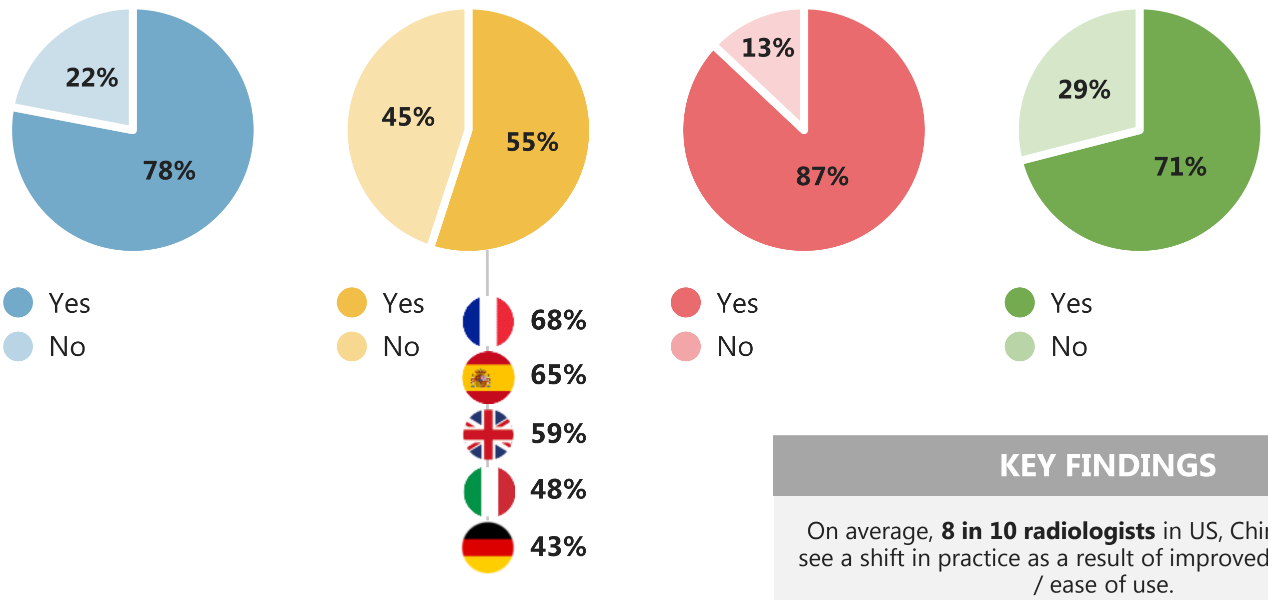
Perception that non-radiology specialists will perform reads / purchase own equipment



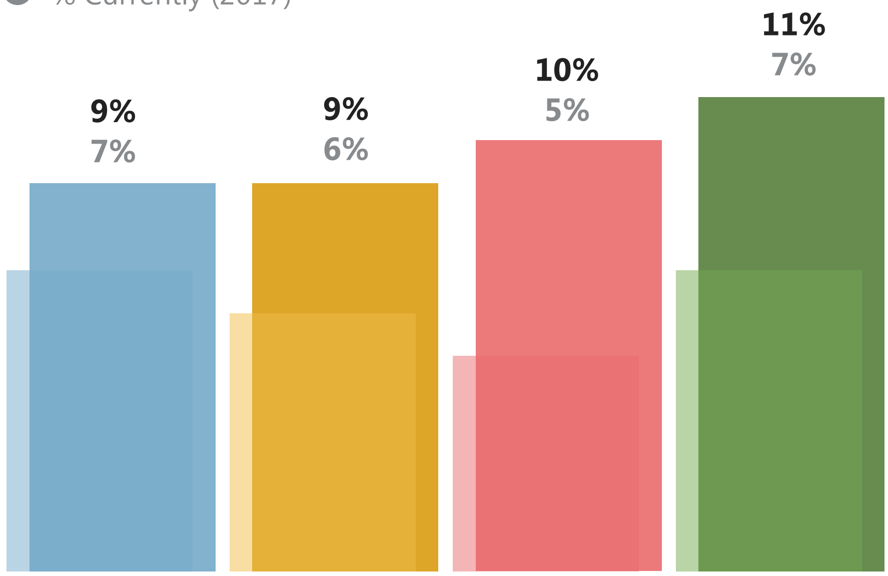
KEY FINDINGS

On average, **8 in 10 radiologists** in US, China and Brazil see a shift in practice as a result of improved automations / ease of use.

However, **opinions are more divided within European markets**.

MRI: % of scans performed under general anaesthesia

- % 5 years from now (2022)
- % Currently (2017)



KEY FINDINGS

All markets expect to see an increase over the next 5 years, with approximately 1 in 10 MR scans being performed under general anaesthesia by 2022.

Radiologists in China foresee the largest rise, with procedure volumes expected to double (from 5 to 10 percent).

In order to facilitate growth, radiologists in all geographies foresee hospitals **doubling the number of MR compatible anaesthesia machines over the next 5 years.**

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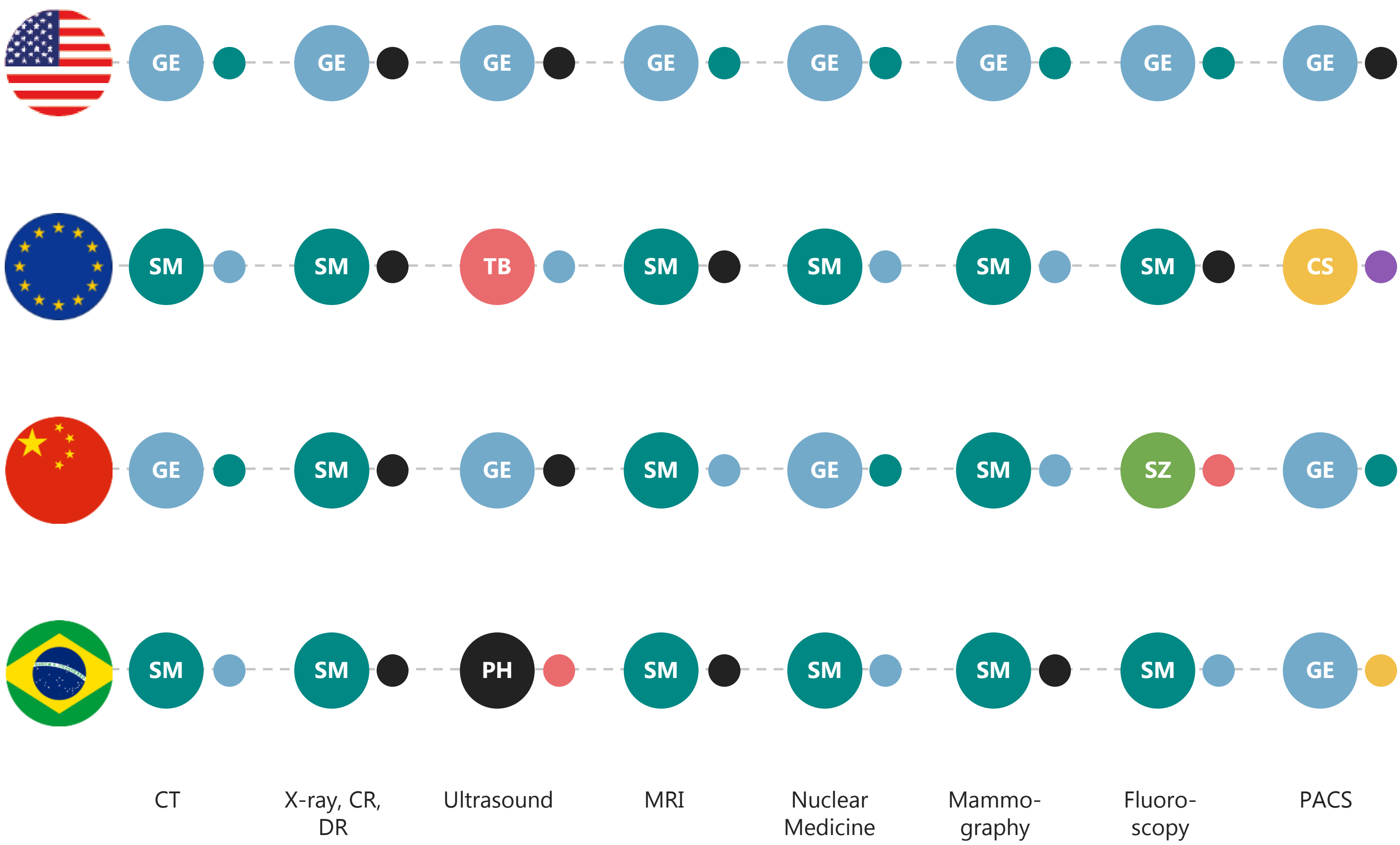
Shimadzu (SZ) · Philips (PH) · AGFA (AG)

GE Healthcare · Carestream (CS) · Siemens (SM) · Toshiba (TB)

Who is the most innovative manufacturer in Radiology?



Most innovative manufacturer · **2nd Most innovative manufacturer**

KEY FINDINGS

Although opinions differ between markets, innovation in the majority of technologies is perceived to be driven mainly by GE and Siemens. The exceptions are: Ultrasound where Philips and Toshiba are also highly regarded; Fluoroscopy where Shimadzu is seen as the most innovative in China; and PACS where Carestream is seen as a leader in Europe and Brazil.

245 practicing radiologists from 8 selected markets were invited at random to take part in a **5 min online survey consisting of 10 structured questions (fielded in local languages).** Fieldwork was conducted over a 5 day period in July 2017.

Base: (Radiologists): USA n=67, Europe n=124 (UK n=17, FR n=25, DE n=35, ES n=20, IT n=27), China n=30, Brazil n=24

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How can SERMO RealTime benefit my business?

- SERMO RealTime (a digital HCP-only rapid research tool) is not intended to replace traditional quantitative surveys, however it does provide a valuable option to gather almost instant and affordable insights in todays fast-paced environment.

- SERMO RealTime can be used for multiple purposes. However, it can be particularly useful for:
    - Refining an upcoming study design
    - Supporting an ongoing business decisions
    - Checking on brand messaging and/or visuals
    - Tracking market trends
    - Analysing general sentiment pre and post-campaign
    - Supporting a workshop discussion

How does it work?

- Questionnaires can be scripted and launched within 24 hours, although 1-2 days should be allotted if translation is required.

- Surveys can be in field for either 24 hours, 48 hours, or 5 days based on the sample number, types of questions being asked, and the target audience. However, **76% of all pulse surveys complete in under 5 hours.**

- Questions are fielded online to a global panel of 1.8 million HCPs. This Panel (managed by SERMO) encompasses 40+ specialities from 30 countries, including: US, Europe (15 markets), Mexico, Brazil, Argentina, Turkey, Russia and APAC (7 markets).

- Target lists can also be uploaded and panel matched.

- Following completion of fieldwork, raw data can be provided instantly in Excel, and PowerPoint (including analysis) within 1-3 days.

- Surveys are limited to **10 questions** with the option of 2 screener questions if needed.

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Ipsos Healthcare – the specialist healthcare division of Ipsos – partnering with pharmaceutical, bio-tech and medical device manufacturers to **inspire better healthcare.**

Operating in over 40 countries, our 600+ 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 syndicated real world evidence, and market-leading custom research approaches – all underpinned by a global footprint and unprecedented access to today's healthcare stakeholders.

SERMO

SERMO - A leading global social network for physicians where close to 800,000 fully verified and licensed physicians from more than 150 countries talk real-world medicine, review what peers think of different treatment options - including ratings and comments on prescription drugs - collectively solve cases, respond to healthcare polls, and earn honorarium from surveys.

In 17 years, SERMO has become the world's largest healthcare professional (HCP) polling company. The SERMO research network is comprised of 1.8 million HCPs and includes 40 percent of the U.S. physician population. Most of the 700,000 surveys SERMO conducts annually are among specialist physicians – over 70 percent of physician members are specialists.

For more information on MD&D market research and data from this survey, please contact us at:

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Or visit our microsite:

www.ipsos-medtech.com