Clinician of the Future

2025 Databook

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Contents

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Summary

Current State of healthcare

➤ Over two thirds of clinicians are seeing more patients than before.

➤ Over a quarter think they do not have enough time to deliver good care, due to high patient volumes, excess administration and increasing complexity of patient's medical needs.

➤ Six in ten say they struggle to keep up with medical advances.

➤ And nearly half believe tiredness has impaired their ability to treat patients effectively.

➤ Just under a third are thinking of leaving their role. This is down from 37% in 2023.

➤ Clinicians believe institutions and national governments performance in key priority areas including providing preventative care and ensuring workforce capacity is low.

➤ Performance for providing governance and support for use of AI is particularly low scoring.

➤ Only just over a third think governments are doing a good job of funding clinical research

AI Helping Transform Healthcare

➤ Over half of clinicians think that AI tools developed to support clinical decision-making will save them time and empower them. They believe it gives them more choice, particularly among nurses.

➤ Nearly half of clinicians use an AI product for a work purpose. This is nearly double what it was in 2024.

➤ Of the 48% of clinicians who use AI for a work purpose, nearly all have used a generalist AI tool at some point. Fewer, about three quarters of them, have used a clinical-specific AI tool. Meaning approximately a quarter of clinicians using an AI tool have relied on a generalist AI tool.

➤ The most common tasks for using (any) AI tool is identifying drug interactions and writing patient letters. Clinical-specific AI tools are most often used for analyzing medical images.

➤ Around two thirds of clinicians say that automatically citing references, ensuring confidentiality and training the AI on high-quality peer reviewed content would increase their trust in clinical-specific AI tools.

The future of healthcare

➤ Within the next 2 to 3 years, over half of clinicians believe :
  ➤ Universal healthcare will be available
  ➤ Hospital stays will be shorter
  ➤ But health costs will be higher in real terms
  ➤ And AI will be used to analyze all medical images to identify abnormalities

➤ Clinical AI tools they think will:
  ➤ save them time
  ➤ speed up diagnosis
  ➤ enable more accurate diagnosis
  ➤ improve patient outcomes

How to read this databook

Each survey question is shown in 7 ways before moving on to the next survey question

1 Overall Global Scores

| By region | **2** Clinicians | **3** Doctors | **4** Nurses |

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….will indicate which cut(s) of the data you are looking at

Overall

| Clinicians | Doctors | Nurses |

Current State of Healthcare

What is impacting clinicians today

Over two thirds of clinicians (69%) are seeing more patients than before. Over a quarter (28%) think they do not have enough time to deliver good care. Six in ten (61%) struggle to keep up with medical advances, and nearly half (47%) believe tiredness has impaired their ability to treat patients effectively

%Disagree/Agree

	Clinicians	Doctors	Nurses
	n= 2044 - 2192	n= 1657 - 1775	n= 377 - 418
I am seeing more patients now than 2 years ago	16% 69%	18% 65% ★	14% 74% DR
The amount of time I am able to spend with patients is sufficient to give them good care	28% 64%	28% 62%	28% 66%
Keeping up with medical advances is challenging	27% 61%	18% 72% ★NU	37% 50% ★
Medical misinformation is hindering my patients from accepting recommended treatments	24% 59%	20% 67% ★NU	29% 51% ★
Tiredness has impaired my ability to treat patients effectively	40% 47%	34% 51% ★NU	47% 42%
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	46% 42%	41% 46% ★NU	51% 38%
I am considering leaving my current role within the next 2-3 years	58% 31%	58% 30%	57% 33%

Time with patients sufficient to give them good care
- 2023: 61%
- 2022: 52%

Clinicians considering leaving their roles
- 2023: 37%
- 2022: 33%

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: To what extent do you agree or disagree with each of the following statements with regards to healthcare?
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2044 - 2192

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What is impacting clinicians today

Over a quarter (28%) of clinicians struggle to deliver good care in the time available, with this figure higher in Europe (41%) and North America (38%) and lowest in Asia Pacific (19%)

%Disagree/Agree

	Clinicians n= 2044 - 2192	North America n= 246 - 267	South America n= 147 - 162	Europe n= 401 - 436	Asia Pacific n= 1088 - 1163	Middle East & Africa n= 138 - 147
I am seeing more patients now than 2 years ago	16% 69%	19% 62% ★	23% 63%	23% 63% ★	12% 74% ★ (NA SA EU)	16% 77% ★ (NA SA EU)
The amount of time I am able to spend with patients is sufficient to give them good care	28% 64%	38% 50% ★	37% 56%	41% 52% ★	19% 73% ★ (NA SA EU MA)	28% 62% (NA EU)
Keeping up with medical advances is challenging	27% 61%	20% 65% (AP)	19% 78% ★ (NA EU AP)	24% 65% (AP)	32% 55% ★	23% 70% ★ (AP)
Medical misinformation is hindering my patients from accepting recommended treatments	24% 59%	15% 71% ★ (EU AP)	19% 71% ★ (EU AP)	26% 59%	27% 54% ★	19% 70% ★ (EU AP)
Tiredness has impaired my ability to treat patients effectively	40% 47%	38% 47%	33% 61% ★ (NA EU AP)	35% 48%	44% 44%	38% 54% (AP)
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	46% 42%	37% 48% (AP)	32% 58% ★ (NA AP)	39% 51% ★ (AP)	55% 32% ★	34% 56% ★ (AP)
I am considering leaving my current role within the next 2-3 years	58% 31%	42% 46% ★ (AP)	55% 36% (AP)	46% 43% ★ (AP)	67% 22% ★	51% 40% ★ (AP)

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: To what extent do you agree or disagree with each of the following statements with regards to healthcare? "Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2044 - 2192

What is impacting clinicians today

Doctors in particular struggle to keep up with medical advances (72% vs. 50% of nurses – see next slide)

%Disagree/Agree	Doctors n= 1657 - 1775	North America n= 165 - 176	South America n= 125 - 132	Europe n= 330 - 358	Asia Pacific n= 918 - 985	Middle East & Africa n= 103 - 109
Keeping up with medical advances is challenging	18% 72%	19% 68%	15% 80% (NA)	17% 72%	19% 72%	17% 76%
Medical misinformation is hindering my patients from accepting recommended treatments	20% 67%	16% 71% (EU)	29% 62%	23% 62%	18% 69%	17% 72% (EU) (EU)
I am seeing more patients now than 2 years ago	18% 65%	24% 53% ★	21% 68% (NA)	21% 63% (NA)	16% 66%	17% 76% (NA) ★ (NA EU AP)
The amount of time I am able to spend with patients is sufficient to give them good care	28% 62%	35% 51% ★	31% 63% (NA)	39% 53% ★	21% 67% ★ (NA EU)	30% 65% (NA EU)
Tiredness has impaired my ability to treat patients effectively	34% 51%	41% 40% ★	39% 51%	37% 49%	28% 56% ★ (NA EU MA)	49% 44%
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	41% 46%	35% 49%	38% 49%	36% 52% ★ (AP)	46% 42% ★	39% 51%
I am considering leaving my current role within the next 2-3 years	58% 30	43% 45%	64% 29% ★ (SA AP MA)	52% 39% ★ (AP MA)	61% 24% ★	67% 26%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: To what extent do you agree or disagree with each of the following statements with regards to healthcare? "Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 1657 - 1775

What is impacting clinicians today

Nurses in particular are seeing more patients than before (74% vs. 65% of doctors – see prior slide)

%Disagree/Agree	Nurses n= 377 - 418	North America n= 80 - 91	South America n= 22 - 31	Europe n= 71 - 80	Asia Pacific n= 165 - 178	Middle East & Africa n= 35 - 38
I am seeing more patients now than 2 years ago	14% 74%	15% 71%		25% 62% ★	8% 81%	EU 16% 78%
The amount of time I am able to spend with patients is sufficient to give them good care	28% 66%	41% 49% ★	Too few responses	43% 51% ★	16% 80% ★ NA EU MA	26% 58%
Medical misinformation is hindering my patients from accepting recommended treatments	29% 51%	14% 71% ★ EU AP		29% 56% AP	36% 39% ★	21% 68% AP ★
Keeping up with medical advances is challenging	37% 50%	22% 62% ★ AP	23% 77% ★ AP	31% 57% AP	46% 39% ★	29% 63% AP
Tiredness has impaired my ability to treat patients effectively	47% 42%	35% 55% ★ AP		34% 47% AP	60% 31% ★	28% 64% ★ AP
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	51% 38% AP	38% 47%	25% 68% ★ NA AP	41% 49% ★ AP	64% 23% ★	29% 61% ★ AP
I am considering leaving my current role within the next 2-3 years	57% 33% ★ AP	42% 46%		41% 47% ★ AP	72% 20% ★	34% 54% ★ AP

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: To what extent do you agree or disagree with each of the following statements with regards to healthcare? "Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 377 - 418

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What is impacting clinicians today

Medical misinformation among patients in the USA is hindering treatment acceptance, with 74% of clinicians reporting this compared to 59% globally

%Disagree/Agree

Statement	Clinicians n= 2044 - 2192	USA n= 226 - 246	China n= 450 - 479	India n= 263 - 291	Japan n= 161 - 168	UK n= 100 - 109	Brazil n= 98 - 107
I am seeing more patients now than 2 years ago	16% 69%	19% 61% ★	9% 75% US JP BR ★	10% 79% US JP BR	20% 60% ★	16% 71% BR	28% 54% ★
The amount of time I am able to spend with patients is sufficient to give them good care	28% 64%	36% 51% ★	13% 79% US JP UK BR ★	14% 83% US UK BR	38% 50% ★	31% 60%	33% 60%
Keeping up with medical advances is challenging	27% 61%	17% 67% CH JP	33% 52% JP ★	29% 60% CH JP	53% 29 ★	27% 59% JP	18% 79% IN CH US JP UK ★
Medical misinformation is hindering my patients from accepting recommended treatments	24% 59%	12% 74% CH JP UK ★	29% 45% JP ★	19% 69% CH JP UK ★	50% ★	33% 54% JP	25% 64% CH JP
Tiredness has impaired my ability to treat patients effectively	40% 47%	37% 47% JP	42% 43% JP	51% 42% JP	58% 25 ★	43% 41% JP	33% 63% IN CH US JP UK ★
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	46% 42%	32% 51% CH IN JP ★	61% 26% JP ★	52% 37% CH JP	69% 1 ★	42% 49% CH IN JP	36% 57% IN CH JP ★
I am considering leaving my current role within the next 2-3 years	58% 31%	41% 45% CH IN JP BR ★	75% 14% ★	64% 27% CH	70% 2 ★	48% 44% CH IN JP ★	59% 33 CH JP

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: To what extent do you agree or disagree with each of the following statements with regards to healthcare? "Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2044 - 2192

What is impacting clinicians today

Tiredness has impaired nearly two thirds (64%) of doctors in China compared to half (51%) of doctors globally

%Disagree/Agree	Doctors n= 1657 - 1775	USA n= 149 - 160	China n= 392 - 419	India n= 230 - 256	Japan n= 132 - 136	UK n= 71 - 78	Brazil n= 83 - 85
Keeping up with medical advances is challenging	18% 72%	17% 69% JP	11% 76% JP	21% 72% JP	50% 35% ★	15% 73% JP	14% 81% US JP
Medical misinformation is hindering my patients from accepting recommended treatments	20% 67%	15% 73% JP UK BR	17% 67% JP UK	12% 81% CH US UK BR ★	38% 45% ★	30% 54%	36% 58% ★
I am seeing more patients now than 2 years ago	18% 65%	21% 55% ★	14% 68% US JP	14% 71% US JP	25% 52% ★	21% 64%	24% 64%
The amount of time I am able to spend with patients is sufficient to give them good care	28% 62%	35% 50% ★	15% 71% US JP UK ★	21% 72% US JP UK ★	44% 39% ★	39% 50%	31% 61% ★ JP
Tiredness has impaired my ability to treat patients effectively	34% 51%	41% 41% ★	18% 64% US IN JP UK BR ★	39% 50% JP	44% 36% ★	40% 39%	43% 49% ★ JP
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	41% 46%	33% 51% CH JP	47% 36% JP ★	40% 54% CH JP ★	66% 22% ★	36% 53% CH JP	40% 51% CH JP
I am considering leaving my current role within the next 2-3 years	58% 30	43% 44% CH IN JP BR ★	63% 19% ★	64% 27% CH	59% 25	45% 45% CH IN JP BR ★	69% 26

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

What is impacting clinicians today

Nearly half (47%) of nurses in the USA are considering leaving their roles, compared to 33% globally

%Disagree/Agree	Nurses n= 377 - 418	USA n= 76 - 86	China n= 58 - 60	India n= 33 - 35	Japan n= 27 - 32	UK n= 27 - 31	Brazil n= 15 - 22
I am seeing more patients now than 2 years ago	14% 74%	17% 67%	5% 83% US	6% 88% US			
The amount of time I am able to spend with patients is sufficient to give them good care	28% 66%	37% 53% ★	10% 87% US JP ★	6% 94% US UK ★	32% 61%	23% 70%	
Medical misinformation is hindering my patients from accepting recommended treatments	29% 51%	10% 76% CH IN JP UK ★	40% 25% ★	26% 56% CH JP	61% 13% ★	37% 53% CH JP	Too few responses
Keeping up with medical advances is challenging	37% 50%	16% 65% CH JP ★	55% 28% ★	37% 49% CH JP	56% 22% ★	39% 45% JP	
Tiredness has impaired my ability to treat patients effectively	47% 42%	34% 54% CH IN JP	67% 22% ★	64% 33%	73% 13% ★	47% 43% CH JP	
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	51% 38%	32% 51% CH IN JP ★	75% 15% ★	63% 20% ★	72% 13% ★	48% 45% CH IN JP	
I am considering leaving my current role within the next 2-3 years	57% 33%	39% 47% CH JP ★	86% 10% ★	64% 27% CH	81% 16%	50% 43% CH JP	

By Key Country

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: To what extent do you agree or disagree with each of the following statements with regards to healthcare? "Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 377 - 418

Why clinicians are considering leaving their role

Of those who are considering leaving, a third will either leave healthcare entirely or retire (33%), while the majority plan to move another role within health care (58%)

	Clinicians N= 635	Doctors N= 492	Nurses N= 143
Stay in healthcare but changing role or location	58%	60%	56%
Move to a non-healthcare related job	13%	9% ★	16% ★ DR
Take a leave of absence/ sabbatical	3%	6% ★ NU	1% ★
Retire	20%	21%	19%
Don't know / prefer not to say	7%	5%	8%

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: You mention that you are considering leaving your role within the next 2-3 years. If this does happen, what are you most likely to do next?
Only asked to those who are considering leaving.
Base: n= 635

Why clinicians are considering leaving their role

Of those leaving, clinicians in South America are most likely to leave healthcare entirely (23% vs. 13% globally). In North America, more clinicians are planning to retire (36% vs. 20% globally)

	Clinicians n= 635	North America n= 113	South America n= 47	Europe n= 161	Asia Pacific n= 262	Middle East & Africa n= 46
Stay in healthcare but changing role or location	58%	48% ★	34% ★	59% SA	65% ★ NA SA	69% NA SA
Move to a non-healthcare related job	13%	9%	23% ★ NA EU	7% ★	15% EU	20% EU
Take a leave of absence/ sabbatical	3%	2%	4%	4%	2%	5%
Retire	20%	36% ★ EU AP MA	25% AP MA	24% AP MA	12% ★	6% ★
Don't know / prefer not to say	7%	6%	14% MA	7%	6%	0%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *clinicians*   ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: You mention that you are considering leaving your role within the next 2-3 years. If this does happen, what are you most likely to do next?
Only asked to those who are considering leaving.
Base: n= 635

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Why doctors are considering leaving their role

Of those leaving, doctors in Europe are least likely to leave healthcare entirely (3% vs. 9% all doctors)

	Doctors n= 492	North America n= 75	South America n= 37	Europe n= 126	Asia Pacific n= 222	Middle East & Africa n= 27
Stay in healthcare but changing role or location	60%	47% ★	59%	55%	67%	NA EU
Move to a non-healthcare related job	9%	11%	16% EU	3% ★	9%	Too few responses
Take a leave of absence/ sabbatical	6%	4%	8%	9%	4%	
Retire	21%	32% ★ SA AP	11%	29% SA AP	14% ★	
Don't know / prefer not to say	5%	7%	6%	5%	6%	

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: You mention that you are considering leaving your role within the next 2-3 years. If this does happen, what are you most likely to do next?
Only asked to those who are considering leaving.
Base: n= 492

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Why nurses are considering leaving their role

Of those leaving, twice as many nurses in North America are looking to retire (39%) compared to Asia Pacific and globally (both 19%)

	Nurses n= 143	North America n= 38	South America n= 10	Europe n= 35	Asia Pacific n= 40	Middle East & Africa n= 19
Stay in healthcare but changing role or location	56%	49%		62%	62%	
Move to a non-healthcare related job	16%	7%	Too few responses	10%	22%	Too few responses
Take a leave of absence/ sabbatical	1%	0%		0%	0%	
Retire	19%	39%	★ AP	19%	9%	
Don't know / prefer not to say	8%	5%		9%	7%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses
★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: You mention that you are considering leaving your role within the next 2-3 years. If this does happen, what are you most likely to do next?
Only asked to those who are considering leaving.
Base: n= 143

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Why clinicians are considering leaving their role

Of those leaving, clinicians in China (73%) and Japan (79%) are most likely to move to another role within healthcare, higher than the average of 58%

	Clinicians n= 635	USA n= 102	China n= 79	India n= 72	Japan n= 38	UK n= 45	Brazil n= 29
Stay in healthcare but changing role or location	58%	53%	73% ★	US UK 66%	UK 79% ★	US UK 47%	
Move to a non-healthcare related job	13%	9%	9%	22% ★ CH US UK	10%	3%	
Take a leave of absence/ sabbatical	3%	2%	0%	5%	0%	8%	**Too few responses**
Retire	20%	30% ★ CH IN JP	7% ★	7% ★	9%	35% ★ CH IN JP	CH
Don't know / prefer not to say	7%	6%	11%	IN 1% ★	2%	7%	

By Key Country

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: You mention that you are considering leaving your role within the next 2-3 years. If this does happen, what are you most likely to do next?
Only asked to those who are considering leaving.
Base: n= 635

Why doctors are considering leaving their role

Of those leaving, fewer doctors in the UK are likely to stay in a healthcare role (25% vs. 60% of doctors globally). Instead, they are more likely to retire (47% vs. 21%) or take a leave of absence/sabbatical (16% vs. 6%), compared to globally

	Doctors n= 492	USA n= 66	China n= 73	India n= 63	Japan n= 33	UK n= 32	Brazil n= 22
Stay in healthcare but changing role or location	60%	50%	UK 67%	US UK 65%	UK 79% ★	US UK 25	★
Move to a non-healthcare related job	9%	11%	14%	10%	3%	6%	
Take a leave of absence/ sabbatical	6%	3%	0% ★	10%	CH 0%	16%	★ US CH JP
Retire	21%	30%	CH IN 11%	14%	15%	47%	★ CH IN JP
Don't know / prefer not to say	5%	6%	8%	2%	3%	6%	

By Key Country

Clinicians · Doctors · Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: You mention that you are considering leaving your role within the next 2-3 years. If this does happen, what are you most likely to do next?
Only asked to those who are considering leaving.
Base: n= 492

Why nurses are considering leaving their role

Of those leaving, more nurses than doctors are looking to move to a non-healthcare related job (16% vs. 9%)

	Nurses n= 143	USA n= 36	China n= 6	India n= 9	Japan n= 5	UK n= 13	Brazil n= 7
Stay in healthcare but changing role or location	56%	56%					
Move to a non-healthcare related job	16%	8%					
Take a leave of absence/ sabbatical	1%	0%	Too few responses				
Retire	19%	31%					
Don't know / prefer not to say	8%	6%					

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *nurses* ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: You mention that you are considering leaving your role within the next 2-3 years. If this does happen, what are you most likely to do next?
Only asked to those who are considering leaving.
Base: n= 143

Why do clinicians think they don't have enough time for quality care

High patient volumes, excess administration and increasing complexity of patient's medical needs are the most cited reasons by clinicians who do not have time to provide good care (1/2)

1/2	Clinicians N= 607	Doctors N= 483	Nurses N= 124	
High patient volumes reduce time available for each patient	74%	76%	73%	
Have to complete too much administration (e.g. updating health records)	73%	75%	70%	
Increasing complexity of patients' medical needs	57%	55%	58%	
Not enough time to explain complex medical conditions clearly	46%	54%	NU ★ 38%	★
I need to spend time managing patients' misconceptions based on false or misleading health information	38%	41%	35%	
Insufficient time to ask all necessary diagnostic questions	35%	31%	38%	
Reimbursement models mean less time with patients	26%	28%	24%	

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 607

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Why do clinicians think they don't have enough time for quality care

High patient volumes, excess administration and increasing complexity of patient's medical needs are the most cited reasons by clinicians who do not have time to provide good care (2/2)

2/2	Clinicians N= 607	Doctors N= 483	Nurses N= 124	
Digital tools to help diagnose patients are inadequate	25%	20%	30%	★ DR
Patients have numerous questions	22%	24%	19%	
Other (please specify)	9%	3% ★	16%	★ DR
I am expected to manage one health condition at a time	8%	7%	9%	
Don't know / prefer not to say	1%	0%	1%	

Overall

Clinicians	Doctors	Nurses

Back to home

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 607

Why do clinicians think they don't have enough time for quality care

Of those who do not have time to provide good care, more clinicians in North America (71%) than globally (57%) believe increasing complexity in patients' medical needs reduces time for quality care (1/2)

1/2

	Clinicians n= 607	North America n= 93		South America n= 50	Europe n= 167	Asia Pacific n= 252	Middle East & Africa n= 43	
High patient volumes reduce time available for each patient	74%	72%		64%	75%	76%	84%	SA
Have to complete too much administration (e.g. updating health records)	73%	79%	MA	76% (MA)	70% (MA)	74% (MA)	54%	★
Increasing complexity of patients' medical needs	57%	71%	★ SA EU AP	51%	51%	57%	63%	
Not enough time to explain complex medical conditions clearly	46%	56%	EU	44%	40%	47%	52%	
I need to spend time managing patients' misconceptions based on false or misleading health information	38%	51%	★ EU AP	38%	33%	37%	38%	
Insufficient time to ask all necessary diagnostic questions	35%	42%	SA	22%	34%	35%	38%	
Reimbursement models mean less time with patients	26%	44%	★ SA EU AP MA	22%	22 (MA)	27% (MA)	8%	★

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 607

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Why do clinicians think they don't have enough time for quality care

Of those who do not have time to provide good care, more clinicians in North America (71%) than globally (57%) believe increasing complexity in patients' medical needs reduces time for quality care (2/2)

	Clinicians n= 607	North America n= 93	South America n= 50	Europe n= 167	Asia Pacific n= 252	Middle East & Africa n= 43
Digital tools to help diagnose patients are inadequate	25%	21%	14%	33%	22% (SA NA AP)	35% (SA)
Patients have numerous questions	22%	34% ★ (EU AP)	21%	17%	22%	20%
Other (please specify)	9%	10% (MA)	6%	17% ★ (AP MA)	5%	0% ★
I am expected to manage one health condition at a time	8%	9%	2%	10%	7%	13%
Don't know / prefer not to say	1%	1%	0%	2%	0%	0%

Back to home

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 607

Why do doctors think they don't have enough time for quality care

Of those who do not have time to provide good care, more doctors in North America (87%) believe too much administration reduces time for quality care, compared to globally (75%) (1/2)

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1/2	Doctors n= 483	North America n= 61	South America n= 39	Europe n= 136	Asia Pacific n= 212	Middle East & Africa n= 33	
High patient volumes reduce time available for each patient	76%	70%	64%	79%	77%	79%	
Have to complete too much administration (e.g. updating health records)	75%	87% ★ AP MA	80% MA	81% AP MA	70% MA	39%	★
Increasing complexity of patients' medical needs	55%	66% AP	47%	57%	51%	58%	
Not enough time to explain complex medical conditions clearly	54%	56%	51%	48%	58%	55%	
I need to spend time managing patients' misconceptions based on false or misleading health information	41%	61% ★ EU AP	52% EU	32% ★	39%	45%	
Insufficient time to ask all necessary diagnostic questions	31%	39%	25%	27%	34%	27%	
Reimbursement models mean less time with patients	28%	62% ★ SA EU AP MA	26% MA	24 MA	24% MA	6%	★

By Region

Clinicians · Doctors · Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 483

24

Why do doctors think they don't have enough time for quality care

Of those who do not have time to provide good care, more doctors in North America (87%) believe too much administration reduces time for quality care, compared to globally (75%) (2/2)

ELSEVIER

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2/2	Doctors n= 483	North America n= 61	South America n= 39	Europe n= 136	Asia Pacific n= 212	Middle East & Africa n= 33
Patients have numerous questions	24%	39%	★ SA EU AP MA 15%	21%	26%	12%
Digital tools to help diagnose patients are inadequate	20%	18%	10%	27%	SA AP 17%	30% SA
I am expected to manage one health condition at a time	7%	5%	5%	10%	7%	6%
Other (please specify)	3%	8%	AP 3%	3%	2%	0%
Don't know / prefer not to say	0%	2%	0%	0%	1%	0%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 483

Why do nurses think they don't have enough time for quality care

Of those who do not have time to provide good care, more nurses in North America (75%) than Europe (45%) believe increasing patient complexity reduces time for quality care (1/2)

1/2	Nurses n= 124	North America n= 32	South America n= 11	Europe n= 31	Asia Pacific n= 40	Middle East & Africa n= 10
High patient volumes reduce time available for each patient	73%	74%		72%	74%	
Have to complete too much administration (e.g. updating health records)	70%	71%		60%	80%	
Increasing complexity of patients' medical needs	58%	75% EU		45%	64%	
Insufficient time to ask all necessary diagnostic questions	38%	45%		40%	37%	
Not enough time to explain complex medical conditions clearly	38%	56% AP		33%	32%	
I need to spend time managing patients' misconceptions based on false or misleading health information	35%	42%		33%	36%	
Digital tools to help diagnose patients are inadequate	30%	23		38%	29%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 124

Why do nurses think they don't have enough time for quality care

Of those who do not have time to provide good care, more nurses in North America (75%) than Europe (45%) believe increasing patient complexity reduces time for quality care (2/2)

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ELSEVIER

2/2	Nurses n= 124	North America n= 32	South America n= 11	Europe n= 31	Asia Pacific n= 40	Middle East & Africa n= 10
Reimbursement models mean less time with patients	24	27%		20%	31%	
Patients have numerous questions	19%	29%		13%	17%	
Other (please specify)	16%	11%	Too few responses	29%	9% (AP)	Too few responses
I am expected to manage one health condition at a time	9%	12%		10%	8%	
Don't know / prefer not to say	1%	0%		4%	0%	

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 124

27

Why do clinicians think they don't have enough time for quality care

Of those who do not have time to provide good care, most clinicians in the UK (94%) believe the cause is high patient volumes (vs. 74% globally) (1/2)

1/2	Clinicians n= 607	USA n= 85	China n= 69	India n= 55	Japan n= 69	UK n= 36	Brazil n= 32
High patient volumes reduce time available for each patient	74%	74%	81%	JP BR 84%	JP BR 66%	94% ★	US JP BR 56% ★
Have to complete too much administration (e.g. updating health records)	73%	82%	IN 71%	57% ★	89% ★	CH IN 76%	74%
Increasing complexity of patients' medical needs	57%	66%	IN 57%	IN 37% ★	65%	IN 77% ★	CH IN 64% IN
Not enough time to explain complex medical conditions clearly	46%	58% ★	IN JP 51%	37%	41%	49%	44%
I need to spend time managing patients' misconceptions based on false or misleading health information	38%	53% ★	37%	37%	41%	41%	58% ★ CH
Insufficient time to ask all necessary diagnostic questions	35%	44%	IN JP BR 46%	IN JP BR 19% ★	22 ★	39%	IN 18
Reimbursement models mean less time with patients	26%	50% ★	CH IN UK BR 26%	18%	39% ★ IN UK	1 ★	26

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 607

28

Why do clinicians think they don't have enough time for quality care

Of those who do not have time to provide good care, most clinicians in the UK (94%) believe the cause is high patient volumes (vs. 74% globally) (2/2)

2/2	Clinicians n= 607	USA n= 85	China n= 69	India n= 55	Japan n= 69	UK n= 36	Brazil n= 32
Digital tools to help diagnose patients are inadequate	25%	18%	41%	★ US IN JP BR 13% ★	8% ★	38%	US IN JP 19%
Patients have numerous questions	22%	33% ★	IN JP 34%	★ IN JP 10% ★	13%	18%	22%
Other (please specify)	9%	11%	CH JP 1%	★ 4%	1% ★	13%	CH JP 10% CH JP
I am expected to manage one health condition at a time	8%	4%	9%	1%	4%	23%	★ US CH IN JP BR 4%
Don't know / prefer not to say	1%	1%	0%	1%	0%	0%	0%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 607

Why do doctors think they don't have enough time for quality care

Of those who do not have time to provide good care, more doctors in the US (91%) compared to globally (75%) believe too much administration is the cause (1/2)

ELSEVIER

1/2	**Doctors** n= 483	**USA** n= 56	**China** n= 63	**India** n= 53	**Japan** n= 59	**UK** n= 29	**Brazil** n= 26
High patient volumes reduce time available for each patient	76%	71%	79%	79%	69%		
Have to complete too much administration (e.g. updating health records)	75%	91% CH IN ⭐	75%	58% ⭐	81% IN		
Increasing complexity of patients' medical needs	55%	63% IN	62%	34% IN ⭐	54% IN		
Not enough time to explain complex medical conditions clearly	54%	54%	63%	47%	49%		
I need to spend time managing patients' misconceptions based on false or misleading health information	41%	61% ⭐	40% CH IN JP	34%	42%		
Insufficient time to ask all necessary diagnostic questions	31%	39%	43%	25% IN JP	24		
Reimbursement models mean less time with patients	28%	64% ⭐	32% CH IN JP	9% IN ⭐	31% IN		

Too few responses

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ⭐⭐
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 483

Why do doctors think they don't have enough time for quality care

Of those who do not have time to provide good care, more doctors in the US (91%) compared to globally (75%) believe too much administration is the cause (2/2)

Back to home

2/2	Doctors n= 483	USA n= 56		China n= 63	India n= 53	Japan n= 59		UK n= 29	Brazil n= 26
Patients have numerous questions	24	38%	★	IN 35%	IN 13%	22			
Digital tools to help diagnose patients are inadequate	20%	16%		24%	JP 17%	7%	★		
I am expected to manage one health condition at a time	7%	2%		14%	US IN JP 2%	0%	★	Too few responses	
Other (please specify)	3%	9%	★	2%	6%	2%			
Don't know / prefer not to say	0%	2%		0%	2%	0%			

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 483

Why do nurses think they don't have enough time for quality care

Of those who do not have time to provide good care, more nurses (30%) than doctors (20%) believe digital tools to help diagnose patients are inadequate (1/2)

1/2	Nurses n= 124	USA n= 29	China n= 6	India n= 2	Japan n= 10	UK n= 7	Brazil n= 6
High patient volumes reduce time available for each patient	73%						
Have to complete too much administration (e.g. updating health records)	70%						
Increasing complexity of patients' medical needs	58%		Too few responses				
Insufficient time to ask all necessary diagnostic questions	38%						
Not enough time to explain complex medical conditions clearly	38%						
I need to spend time managing patients' misconceptions based on false or misleading health information	35%						
Digital tools to help diagnose patients are inadequate	30%						

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 124

Why do nurses think they don't have enough time for quality care

Of those who do not have time to provide good care, more nurses (30%) than doctors (20%) believe digital tools to help diagnose patients are inadequate (2/2)

	Nurses n= 124	USA n= 29	China n= 6	India n= 2	Japan n= 10	UK n= 7	Brazil n= 6
Reimbursement models mean less time with patients	24						
Patients have numerous questions	19			Too few responses			
Other (please specify)	16%						
I am expected to manage one health condition at a time	9%						
Don't know / prefer not to say	1%						

2/2

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".
Base: n= 124

Back to home

Clinicians' views of priorities and performance

Clinicians believe that institutional and government performance is low in key priority areas such as providing preventative care and ensuring workforce capacity. Performance for providing governance and support for use of AI is particularly low scoring

% prioritizing
(very high / priority)

- Institution
- National Governments

Gov't providing preventative care

Making healthcare accessible to all

Patient records up to date

Patient records are readily accessible (e.g. digitized)

Ensuring adequate workforce capacity

Funding clinical research

Funding healthcare (incl. new hospitals)

Ensuring sufficient clinicians to meet demand

Inst. providing preventative care

Attracting and retaining high quality clinicians

Providing guidance/training on the use of AI

Provision of medical equipment

Digital tools to help make clinical decisions

Governance team to manage AI (set policy, acquire tools)

% indicating good performance
(very good / good)

Question: Please indicate the current priority you believe should be attached to the following challenges…
1 is very low priority, 5 is very high priority and the midpoint 3 is neutral. (Y axis)
Question: Please indicate how well your organisation or national government is performing on the following challenges.
Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral. (X axis)
"Don't know / prefer not to say" answers are excluded from the responses.

Overall

Clinicians

Clinicians' priorities for their institutions

Clinicians think that ensuring patient records are up-to-date and accessible, and attracting and retaining high quality clinicians, should be the highest priorities for their institution (1/2)

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Priority should be assigned by my institution

%Low Priority/High Priority	1/2	Clinicians n= 2130 - 2178		Doctors n= 1728 - 1759		Nurses n= 402 - 422	
Ensuring patient records are up to date		4% 86%		5% 81%	★	4% 90%	★
Ensuring patient records are readily accessible (e.g. digitized)		5% 83%		6% 81%	★	4% 86%	
Attracting and retaining high quality clinicians		6% 82%		7% 80%		4% 85%	
Providing preventative care		6% 81%		8% 75%	★	5% 88%	★
Ensuring sufficient clinicians to meet patient demand		7% 80%		8% 77%	★	6% 83%	
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians		18% 62%		17% 61%		19% 63%	
Providing the most appropriate medical equipment to support clinicians and patients		18% 62%		17% 61%		19% 63%	

Overall

Clinicians Doctors Nurses

Significantly higher/ lower than all clinicians ★★

Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2178

35

Clinicians' priorities for their institutions

Clinicians think that ensuring patient records are up-to-date and accessible, and attracting and retaining high quality clinicians, should be the highest priorities for their institution (2/2)

Priority should be assigned by my institution

%Low Priority/High Priority	2/2	Clinicians n= 2130 - 2178	Doctors n= 1728 - 1759	Nurses n= 402 - 422
Providing access to digital tools (including AI) that help me make clinical decisions		16% 56%	17% 57%	15% 55%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)		19% 55%	18% 55%	21% 54%

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2178

Clinicians' priorities for their institutions

More clinicians in South America (92%) think that ensuring patient records are up-to-date should be a high priority for their institution compared to globally (86%) (1/2)

Priority should be assigned by my institution

%Low Priority/High Priority	Clinicians n= 2130 - 2178	North America n= 252 - 265	South America n= 161 - 163	Europe n= 427 - 432	Asia Pacific n= 1131 - 1159	Middle East & Africa n= 142 - 146
Ensuring patient records are up to date	4% 86%	3% 85%	6% 92% ★ NA AP	4% 87%	4% 84%	4% 86%
Ensuring patient records are readily accessible (e.g. digitized)	5% 83%	6% 79%	7% 88% NA MA	4% 85% MA	5% 84% MA	11% 75% ★
Attracting and retaining high quality clinicians	6% 82%	3% 89% ★ AP MA	7% 83% MA	6% 88% ★ AP MA	5% 80% MA	12% 71% ★
Providing preventative care	6% 81%	5% 87% ★ AP	6% 89% ★ EU AP MA	6% 83%	6% 78% ★	9% 81%
Ensuring sufficient clinicians to meet patient demand	7% 80%	4% 88% ★ AP MA	8% 85% AP	7% 82% AP	7% 77% ★	8% 79%
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	18% 62%	16% 66% EU AP	15% 75% ★ EU AP MA	20% 59%	19% 60%	19% 62%
Providing the most appropriate medical equipment to support clinicians and patients	18% 62%	16% 66% EU AP	15% 75% ★ EU AP MA	20% 59%	19% 60%	19% 62%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians
★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2178

Back to home

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Clinicians' priorities for their institutions

More clinicians in South America (92%) think that ensuring patient records are up-to-date should be a high priority for their institution compared to globally (86%) (2/2)

Priority should be assigned by my institution

%Low Priority/High Priority 2/2	Clinicians n= 2130 - 2178	North America n= 252 - 265	South America n= 161 - 163	Europe n= 427 - 432	Asia Pacific n= 1131 - 1159	Middle East & Africa n= 142 - 146
Providing access to digital tools (including AI) that help me make clinical decisions	16% 56%	18% 60%	14% 68% (EU AP MA)	21% 53%	14% 55%	16% 56%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	19% 55%	14% 60% (AP)	17% 59%	19% 53%	21% 53%	22% 57%

By Region

Clinicians   Doctors   Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2178

Doctors' priorities for their institutions

More doctors in North America (88%) than globally (80%) think attracting and retaining high quality clinicians should be a high priority for their institution (1/2)

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Back to home

Priority should be assigned by my institution

%Low Priority/High Priority	Doctors n= 1728 - 1759	North America n= 167 - 173	South America n= 130 - 132	Europe n= 346 - 352	Asia Pacific n= 962 - 982	Middle East & Africa n= 104 - 108
Ensuring patient records are up to date	5% / 81%	2% / 82%	8% / 87% AP	5% / 84% AP	5% / 78%	6% / 86%
Ensuring patient records are readily accessible (e.g. digitized)	6% / 81%	5% / 75%	10% / 83%	4% / 84% NA AP	6% / 79%	8% / 85% NA
Attracting and retaining high quality clinicians	7% / 80%	2% / 88% ★ AP MA	10% / 82%	7% / 84% AP	8% / 76% ★	8% / 77%
Ensuring sufficient clinicians to meet patient demand	8% / 77%	3% / 87% ★ SA AP	12% / 74%	7% / 80% AP	8% / 75%	8% / 81%
Providing preventative care	8% / 75%	6% / 80% AP	9% / 82% AP	7% / 76%	9% / 71% ★	6% / 88% ★ EU AP
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	17% / 61%	18% / 61%	21% / 59%	20% / 57%	15% / 62%	21% / 58%
Providing the most appropriate medical equipment to support clinicians and patients	17% / 61%	18% / 61%	21% / 59%	20% / 57%	15% / 62%	21% / 58%

1/2

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1759

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Doctors' priorities for their institutions

More doctors in North America (88%) than globally (80%) think attracting and retaining high quality clinicians should be a high priority for their institution (2/2)

Priority should be assigned by my institution

%Low Priority/High Priority	Doctors n= 1728 - 1759	North America n= 167 - 173	South America n= 130 - 132	Europe n= 346 - 352	Asia Pacific n= 962 - 982	Middle East & Africa n= 104 - 108
2/2						
Providing access to digital tools (including AI) that help me make clinical decisions	17% 57%	21% 56%	22% 58%	21% 51% ★	14% 61%	EU 19% 55%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	18% 55%	14% 58%	24% 49%	19% 53%	17% 56%	18% 57%

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1759

Nurses' priorities for their institutions

More nurses in South America (97%) than nurses globally (83%) think ensuring sufficient clinicians to meet patient demand, and providing training on the use of AI (91% vs. 63%), should be high priorities for their institution (1/2)

Priority should be assigned by my institution

%Low Priority/High Priority	Nurses n= 402 - 422	North America n= 85 - 92	South America n= 31 - 32	Europe n= 77 - 81	Asia Pacific n= 169 - 179	Middle East & Africa n= 37 - 38	
Ensuring patient records are up to date	4% 90%	5% 87%	3% 97%	4% 91%	3% 90%	3% 86%	
Providing preventative care	5% 88%	3% 93%	MA 3% 97%	MA 5% 89%	MA 4% 86%	13% 74%	★
Ensuring patient records are readily accessible (e.g. digitized)	4% 86%	6% 84%	MA 3% 94%	MA 4% 85%	MA 3% 88%	MA 14% 65%	★
Attracting and retaining high quality clinicians	4% 85%	4% 90%	MA 3% 84%	5% 92%	MA 2% 83%	MA 16% 65%	★
Ensuring sufficient clinicians to meet patient demand	6% 83%	4% 89%	AP MA 3% 97%	7% 85%	6% 80%	8% 76%	
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	19% 63%	14% 72%	AP 9% 91%	NA EU AP MA 20% 60%	23% 57%	16% 66%	
Providing the most appropriate medical equipment to support clinicians and patients	19% 63%	14% 72%	AP 9% 91%	NA EU AP MA 20% 60%	23% 57%	16% 66%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 422

Nurses' priorities for their institutions

More nurses in South America (97%) than nurses globally (83%) think ensuring sufficient clinicians to meet patient demand, and providing training on the use of AI (91% vs. 63%), should be high priorities for their institution (2/2)

Priority should be assigned by my institution

%Low Priority/High Priority 2/2	Nurses n= 402 - 422	North America n= 85 - 92	South America n= 31 - 32	Europe n= 77 - 81	Asia Pacific n= 169 - 179	Middle East & Africa n= 37 - 38
Providing access to digital tools (including AI) that help me make clinical decisions	15% 55%	15% 64% AP	6% 78% ★ EU AP	22% 54%	15% 49%	14% 57%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	21% 54%	15% 62%	10% 70% AP	18% 53%	25% 50%	26% 58%

By Region

Clinicians | Doctors | Nurses

Question: Please indicate the current priority you believe should be attached to the following challenges... 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 422

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Clinicians' priorities for their institutions

More clinicians in the UK (95%) than globally (82%) think a high priority for their institution should be attracting and retaining high quality clinicians, as well as ensuring sufficient clinicians to meet patient demand (95% vs. 80%) (1/2)

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Priority should be assigned by my institution

%Low Priority/High Priority	Clinicians 1/2 n= 2130 - 2178	USA n= 231 - 245	China n= 469 - 481	India n= 274 - 290	Japan n= 164 - 168	UK n= 107 - 109	Brazil n= 106 - 108
Ensuring patient records are up to date	4% / 86%	4% / 83%	4% / 82%	6% / 86%	3% / 87%	2% / 91% (CH)	4% / 94% (CH JP) ★
Ensuring patient records are readily accessible (e.g. digitized)	5% / 83%	6% / 78% ★	4% / 84% (US)	8% / 83%	3% / 85%	2% / 87% (US)	5% / 91% (US) ★
Attracting and retaining high quality clinicians	6% / 82%	3% / 88% (IN JP) ★	5% / 83% (IN JP)	5% / 74% (★)	3% / 76% (★)	2% / 95% (US CH JP) ★	3% / 89% (IN JP)
Providing preventative care	6% / 81%	5% / 86% (CH)	6% / 74% ★	7% / 84% (CH)	5% / 81%	6% / 84% (CH)	3% / 93% (IN CH JP UK) ★
Ensuring sufficient clinicians to meet patient demand	7% / 80%	4% / 88% (CH IN) ★	7% / 74% ★	10% / 76%	3% / 83% (CH)	2% / 95% (US CH JP) ★	5% / 88% (IN CH) ★
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	18% / 62%	16% / 65% (IN UK)	18% / 66% (JP UK)	25% / 45% ★	15% / 57% (IN)	21% / 51% ★	14% / 77% (IN CH US JP UK) ★
Providing the most appropriate medical equipment to support clinicians and patients	18% / 62%	16% / 65% (IN UK)	18% / 66% (JP UK)	25% / 45% ★	15% / 57% (IN)	21% / 51% ★	14% / 77% (IN CH US JP UK) ★

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *clinicians* ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2178

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Clinicians' priorities for their institutions

More clinicians in the UK (95%) than globally (82%) think a high priority for their institution should be attracting and retaining high quality clinicians, as well as ensuring sufficient clinicians to meet patient demand (95% vs. 80%) (2/2)

ELSEVIER

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Priority should be assigned by my institution

%Low Priority/High Priority 2/2	Clinicians n= 2130 - 2178	USA n= 231 - 245	China n= 469 - 481	India n= 274 - 290	Japan n= 164 - 168	UK n= 107 - 109	Brazil n= 106 - 108
Providing access to digital tools (including AI) that help me make clinical decisions	16% 56%	19% 58%	13% 53%	20% 50% ★	6% 67% CH IN UK ★	15% 53%	12% 69% IN CH US UK ★
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	19% 55%	15% 58% IN	18% 54% IN	30% 45% ★	16% 60% IN	15% 52%	14% 65% IN CH ★

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2178

44

Doctors' priorities for their institutions

More doctors in the UK (91%) and Brazil (93%) than global (81%) think their institution should prioritize ensuring patient records are up to date. USA (88%) and UK (92%) doctors think their institutions should place higher priority on ensuring sufficient clinicians to meet demand than globally (77%) (1/2)

Priority should be assigned by my institution

%Low Priority/High Priority	Doctors 1/2 n= 1728 - 1759	USA n= 151 - 158	China n= 411 - 421	India n= 242 - 255	Japan n= 132 - 136	UK n= 76 - 78	Brazil n= 83 - 85
Ensuring patient records are up to date	5% / 81%	2% / 82% CH	4% / 73% ★	6% / 86% CH	4% / 86% CH	91% CH ★	4% / 93% CH US ★
Ensuring patient records are readily accessible (e.g. digitized)	6% / 81%	6% / 74%	5% / 76%	7% / 81%	6% / 82%	1% / 87% US CH	5% / 90% IN CH US ★
Attracting and retaining high quality clinicians	7% / 80%	2% / 88% CH IN JP ★	8% / 76% JP	10% / 79% JP	4% / 65% ★	1% / 94% CH JP ★	2% / 92% IN CH JP ★
Ensuring sufficient clinicians to meet patient demand	8% / 77%	4% / 88% CH IN JP ★	9% / 68% ★	12% / 79% CH	3% / 79% CH	1% / 92% CH JP BR ★	6% / 81% CH
Providing preventative care	8% / 75%	7% / 80% CH	11% / 63% ★	8% / 79% CH	7% / 72%	9% / 75% CH	2% / 90% IN CH JP UK ★
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	17% / 61%	17% / 63%	15% / 61%	17% / 60%	8% / 67%	23% / 53%	14% / 68%
Providing the most appropriate medical equipment to support clinicians and patients	17% / 61%	17% / 63%	15% / 61%	17% / 60%	8% / 67%	23% / 53%	14% / 68%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1759

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Doctors' priorities for their institutions

More doctors in the UK (91%) and Brazil (93%) than global (81%) think their institution should prioritize ensuring patient records are up to date. USA (88%) and UK (92%) doctors think their institutions should place higher priority on ensuring sufficient clinicians to meet demand than globally (77%) (2/2)

Priority should be assigned by my institution

%Low Priority/High Priority	Doctors n= 1728 - 1759	USA n= 151 - 158	China n= 411 - 421	India n= 242 - 255	Japan n= 132 - 136	UK n= 76 - 78	Brazil n= 83 - 85
Providing access to digital tools (including AI) that help me make clinical decisions	17% 57%	21% 57%	15% 55%	13% 60%	5% 84% (US CH UK BR ★)	17% 51%	15% 64%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	18% 55%	13% 60%	18% 51%	17% 61% (CH)	10% 71% (CH UK BR ★)	13% 53%	19% 51%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors
★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1759

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Nurses' priorities for their institutions

Nurses in the UK (97%) think a high priority for their institution should be ensuring there are sufficient clinicians to meet demand, higher than nurses globally (83%) (1/2)

ELSEVIER

Priority should be assigned by my institution

%Low Priority/High Priority 1/2

	Nurses n= 402 - 422	USA n= 80 - 87	China n= 58 - 60	India n= 32 - 35	Japan n= 31 - 32	UK n= 31 - 31	Brazil n= 23 - 23
Ensuring patient records are up to date	4% 90%	6% 85%	3% 92%	6% 85%	3% 88%	3% 90%	
Providing preventative care	5% 88%	3% 92%	2% 85%	6% 89%	3% 91%	3% 94%	
Ensuring patient records are readily accessible (e.g. digitized)	4% 86%	7% 81%	2% 92%	9% 85%	88%	3% 87%	Too few responses
Attracting and retaining high quality clinicians	4% 85%	5% 88% IN	2% 90% IN	69% ★	3% 87%	3% 97% IN	
Ensuring sufficient clinicians to meet patient demand	6% 83%	5% 87%	5% 80%	9% 74%	3% 88%	3% 97% CH IN ★	
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	19% 63%	16% 67% IN JP	22% 70% IN JP UK	32% 29% ★	22% 47%	19% 48%	
Providing the most appropriate medical equipment to support clinicians and patients	19% 63%	16% 67% IN JP	22% 70% IN JP UK	32% 29% ★	22% 47%	19% 48%	

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 422

Nurses' priorities for their institutions

Nurses in the UK (97%) think a high priority for their institution should be ensuring there are sufficient clinicians to meet demand, higher than nurses globally (83%) (2/2)

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Priority should be assigned by my institution

%Low Priority/High Priority 2/2	**Nurses** n= 402 - 422	**USA** n= 80 - 87	**China** n= 58 - 60	**India** n= 32 - 35	**Japan** n= 31 - 32	**UK** n= 31 - 31	**Brazil** n= 23 - 23
Providing access to digital tools (including AI) that help me make clinical decisions	15% 55%	17% 58%	12% 51%	27% 39%	6% 50%	13% 55%	Too few responses
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	21% 54%	18% 56% (IN)	19% 57% (IN)	44% 28% ★	23% 48%	16% 52%	

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 422

Clinicians' priorities for national governments

Clinicians think that providing preventative care, making healthcare accessible to all and ensuring workforce capacity should be the highest priorities for their national government, particularly nurses

Priority should be assigned by my national government

%Low Priority/High Priority	Clinicians n= 2167 - 2186		Doctors n= 1748 - 1764		Nurses n= 415 - 423	
Providing preventative care	6%	85%	8%	79% ★	4%	90% ★ DR
Making healthcare accessible to all	6%	84%	8%	80% ★	4%	88% ★ DR
Ensuring adequate workforce capacity	8%	83%	9%	81% ★	7%	86% DR
Funding clinical research	8%	75%	11%	76%	5%	74%
Funding healthcare (including new hospitals)	8%	71%	9%	74% ★ NU	6%	68%

Overall

Clinicians Doctors Nurses

Significantly higher/ lower than all clinicians
★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2167 - 2186

Clinicians' priorities for national governments

More clinicians in Europe (76%) than globally (71%) think funding healthcare (including new hospitals) should be a high priority for their national government

Priority should be assigned by my national government

%Low Priority/High Priority	Clinicians n= 2167 - 2186		North America n= 262 - 268		South America n= 161 - 162		Europe n= 423 - 435		Asia Pacific n= 1148 - 1160		Middle East & Africa n= 145 - 147	
Providing preventative care	6%	85%	6%	85%	9%	86%	7%	85%	5%	84%	7%	84%
Making healthcare accessible to all	6%	84%	9%	83%	8%	87%	5%	85%	5%	83%	6%	86%
Ensuring adequate workforce capacity	8%	83%	8%	83% MA	11%	85% MA	7%	85% MA	7%	84% MA	12%	73% ★
Funding clinical research	8%	75%	9%	78%	12%	80%	8%	75%	7%	74%	14%	76%
Funding healthcare (including new hospitals)	8%	71%	10%	70%	14%	74%	8%	76% ★ AP	6%	69%	14%	72%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2167 - 2186

50

Doctors' priorities for national governments

More doctors in Europe (85%) than average among doctors globally (80%) believe making healthcare accessible to all should be a high priority for their national government, those in North America think their government should prioritize workflow capacity

Priority should be assigned by my national government

%Low Priority/High Priority	Doctors n= 1748 - 1764	North America n= 175 - 176	South America n= 130 - 131	Europe n= 343 - 354	Asia Pacific n= 970 - 981	Middle East & Africa n= 108 - 109
Ensuring adequate workforce capacity	9% 81%	5% 87% ★ AP MA	15% 82%	8% 82%	8% 79%	14% 75%
Making healthcare accessible to all	8% 80%	10% 81%	9% 85% AP	6% 85% ★ AP	8% 76% ★	7% 84%
Providing preventative care	8% 79%	7% 83% AP	12% 81%	6% 83% AP	8% 75% ★	6% 86% AP
Funding clinical research	11% 76%	9% 81%	18% 79%	10% 75%	11% 76%	17% 72%
Funding healthcare (including new hospitals)	9% 74%	10% 72%	15% 74%	8% 77%	9% 73%	14% 74%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 1748 - 1764

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Nurses' priorities for national governments

Preventative care should be a high priority national governments according to 90% of nurses compared to 79% of doctors globally

Priority should be assigned by my national government

%Low Priority/High Priority	Nurses n= 415 - 423		North America n= 87 - 92		South America n= 31 - 31		Europe n= 80 - 81		Asia Pacific n= 176 - 180		Middle East & Africa n= 36 - 38	
Providing preventative care	4%	90%	6%	87%	6%	91%	8%	88%	2%	93%	MA 8%	82%
Making healthcare accessible to all	4%	88%	8%	86%	6%	91%	5%	85%	1%	90%	5%	87%
Ensuring adequate workforce capacity	7%	86%	10%	80%	6%	87%	6%	88%	MA 6%	88%	MA 11%	71% ★
Funding clinical research	5%	74%	10%	76%	6%	81%	6%	76%	3%	71%	11%	81%
Funding healthcare (including new hospitals)	6%	68%	11%	69%	13%	75%	7%	75%	2%	64%	14%	70%

By Region

Clinicians · Doctors · **Nurses**

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate the current priority you believe should be attached to the following challenges... 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 415 - 423

Clinicians' priorities for national governments

Clinicians in the UK (94%) believe making healthcare accessible to all should be a high priority for their national government, higher than the global average (84%)

Priority should be assigned by my national government

%Low Priority/High Priority	Clinicians n= 2167 - 2186	USA n= 241 - 247	China n= 474 - 480	India n= 284 - 289	Japan n= 165 - 168	UK n= 108 - 109	Brazil n= 105 - 106
Providing preventative care	6% 85%	7% 85%	4% 81%	6% 87% CH	1% 87%	7% 86%	7% 88%
Making healthcare accessible to all	6% 84%	10% 82%	4% 82%	4% 87%	5% 80%	5% 94% ★ CH JP	5% 90% CH JP
Ensuring adequate workforce capacity	8% 83%	9% 84%	7% 81%	9% 81%	0% 97% ★ CH IN BR	5% 92% ★ CH IN	8% 86%
Funding clinical research	8% 75%	10% 77% JP	6% 71%	9% 77% JP	2% 68% ★	8% 73%	8% 85% ★ CH JP UK
Funding healthcare (including new hospitals)	8% 71%	9% 71% JP	4% 67% JP	7% 71% JP	3% 56% ★	7% 83% ★ CH JP	13% 72% JP

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2167 - 2186

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Doctors' priorities for national governments

Fewer doctors in China compared to globally believe their national government should prioritize ensuring workforce capacity, making healthcare accessible to all and providing preventative care

Priority should be assigned by my national government

%Low Priority/High Priority	Doctors n= 1748 - 1764	USA n= 159 - 160	China n= 414 - 420	India n= 249 - 254	Japan n= 133 - 135	UK n= 77 - 78	Brazil n= 83 - 84
Ensuring adequate workforce capacity	9% / 81%	6% / 87% CH	8% / 73% ★	9% / 83% CH	1% / 94% CH IN	4% / 91% ★	7% / 90% CH ★
Making healthcare accessible to all	8% / 80%	10% / 81% CH JP	9% / 71% ★	6% / 88% CH JP ★	8% / 66% ★	3% / 94% CH JP ★	1% / 94% CH JP ★
Providing preventative care	8% / 79%	7% / 86% CH ★	9% / 67% ★	9% / 83% CH	3% / 77% CH	8% / 86% CH	6% / 90% CH JP ★
Funding clinical research	11% / 76%	8% / 82% CH	11% / 73%	13% / 80% CH	1% / 82% CH	9% / 74%	7% / 92% CH US UK ★
Funding healthcare (including new hospitals)	9% / 74%	9% / 72%	9% / 70%	9% / 78% CH JP	7% / 68%	4% / 86% CH JP ★	7% / 81% CH JP

By Key Country

| Clinicians | Doctors | Nurses |

★ ★ Significantly higher/ lower than all doctors
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 1748 - 1764

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Nurses' priorities for national governments

When it comes to funding healthcare, nurses (68%) are less likely to believe this should be a high national government priority compared to doctors (74%)

ELSEVIER

Priority should be assigned by my national government

%Low Priority/High Priority	Nurses n= 415 - 423	USA n= 82 - 87	China n= 60 - 60	India n= 34 - 35	Japan n= 32 - 33	UK n= 31 - 31	Brazil n= 22 - 22
Providing preventative care	4% 90%	7% 85%	0% 95%	3% 91%	97%	6% 87%	
Making healthcare accessible to all	4% 88%	9% 84%	0% 93%	3% 85%	3% 94%	6% 94%	
Ensuring adequate workforce capacity	7% 86%	12% 80%	5% 88%	9% 80%	100% H,N ★	6% 94%	Too few responses
Funding clinical research	5% 74%	11% 72%	2% 70%	6% 74%	3% 55% ★	6% 71%	
Funding healthcare (including new hospitals)	6% 68%	10% 70% JP	0% 63%	6% 63%	45% ★	10% 81% JP	

By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate the current priority you believe should be attached to the following challenges… 1 is very low priority, 5 is very high priority and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 415 - 423

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Clinicians' views of institutional performance

Just under two thirds (63%) of clinicians think their institutions are good at keeping patient records up-to-date and accessible, but less than half (48%) rate performance as good for attracting and retaining high quality clinicians. Fewer than a third think institutions perform well in providing digital tools (32%), AI training (30%) or AI governance (29%). Nurses are generally more positive than doctors (1/2)

Performance by my institution

%Very Poor / Poor & Very Good / Good   1/2

	Clinicians n= 2091 - 2174	Doctors n= 1693 - 1753	Nurses n= 398 - 421
Ensuring patient records are up to date	17% 63%	20% 54% ★	13% 73% ★
Ensuring patient records are readily accessible (e.g. digitized)	19% 63%	23% 56% ★	15% 70% ★
Providing the most appropriate medical equipment to support clinicians and patients	22% 57%	25% 49% ★	19% 65% ★
Providing preventative care	23% 50%	27% 41% ★	20% 59% ★
Attracting and retaining high quality clinicians	30% 48%	36% 39% ★	24% 56% ★
Ensuring sufficient clinicians to meet patient demand	33% 43%	38% 35% ★	28% 51% ★
Providing access to digital tools (including AI) that help me make clinical decisions	39% 32%	44% 28% ★	34% 36% ★

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all *clinicians* ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = *Doctors*)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2174

Clinicians' views of institutional performance

Just under two thirds (63%) of clinicians think their institutions are good at keeping patient records up-to-date and accessible, but less than half (48%) rate performance as good for attracting and retaining high quality clinicians. Fewer than a third think institutions perform well in providing digital tools (32%), AI training (30%) or AI governance (29%). Nurses are generally more positive than doctors (2/2)

Performance by my institution

%Very Poor / Poor & Very Good / Good	2/2	Clinicians n= 2091 - 2174	Doctors n= 1693 - 1753		Nurses n= 398 - 421	
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians		45% 30%	50% 23%	★	41% 37%	★
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)		40% 29%	45% 25%	★	35% 33%	

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★★

Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2174

Clinicians' views of institutional performance

Clinicians in Asia Pacific are more likely to rate the performance of their institutions as good than globally in all areas, and significantly so for most areas. When it comes to AI (access, training and governance), European institutions are furthest behind, according to clinicians (1/2)

Performance by my institution

% Very Poor / Poor & Very Good / Good

	Clinicians n= 2091 - 2174	North America n= 245 - 264	South America n= 157 - 162	Europe n= 402 - 434	Asia Pacific n= 1133 - 1159	Middle East & Africa n= 139 - 146
Ensuring patient records are up to date	17% 63%	17% 64%	28% 46% SA ★	20% 60%	12% 68% SA	31% 56% SA EU MA ★
Ensuring patient records are readily accessible (e.g. digitized)	19% 63%	15% 67%	32% 54% SA MA ★	19% 61%	15% 65%	30% 53% SA MA ★
Providing the most appropriate medical equipment to support clinicians and patients	22% 57%	20% 55%	45% 38% SA ★	24% 54%	17% 63% SA	36% 45% NA SA EU MA ★
Providing preventative care	23% 50%	27% 43% ★	31% 47%	33% 37% EU ★	18% 56%	21% 59% NA SA EU ★
Attracting and retaining high quality clinicians	30% 48%	34% 44%	50% 34% SA ★	38% 38% ★	21% 55%	43% 44% NA SA EU MA ★
Ensuring sufficient clinicians to meet patient demand	33% 43%	40% 37%	51% 33% SA ★	39% 34% ★	25% 49%	38% 47% NA SA EU ★
Providing access to digital tools (including AI) that help me make clinical decisions	39% 32%	32% 34% EU	51% 28%	52% 26% ★	32% 35%	50% 34% EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *clinicians* ★★

Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2174

58

Clinicians' views of institutional performance

Clinicians in Asia Pacific are more likely to rate the performance of their institutions as good than globally in all areas, and significantly so for most areas. When it comes to AI (access, training and governance), European institutions are furthest behind, according to clinicians (2/2)

Performance by my institution

%Very Poor / Poor & Very Good / Good	Clinicians n= 2091 - 2174	North America n= 245 - 264	South America n= 157 - 162	Europe n= 402 - 434	Asia Pacific n= 1133 - 1159	Middle East & Africa n= 139 - 146
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	45% 30%	47% 27%	EU 65% 28%	EU 59% 19% ★	36% 35%	★ NA EU 46% 39% NA EU
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	40% 29%	41% 30%	EU 56% 25%	48% 23% ★	34% 31%	EU 44% 32% EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *clinicians* ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2174

59

Doctors' views of institutional performance

Doctors in Europe are less likely to rate the performance of their institutions as good than globally for AI (access, training and governance), as well as for ensuring sufficient clinicians to meet demand and providing preventative care (1/2)

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Performance by my institution

%Very Poor / Poor & Very Good / Good 1/2	Doctors n= 1693 - 1753		North America n= 158 - 172		South America n= 126 - 131		Europe n= 329 - 353		Asia Pacific n= 964 - 981		Middle East & Africa n= 102 - 108	
Ensuring patient records are readily accessible (e.g. digitized)	23%	56%	12%	66% ★ SA AP MA	33%	52%	22%	57%	22%	54%	31%	53%
Ensuring patient records are up to date	20%	54%	15%	60% SA	31%	46%	22%	53%	17%	55%	33%	49%
Providing the most appropriate medical equipment to support clinicians and patients	25%	49%	20%	56% SA EU	47%	38% ★	27%	46%	21%	51% SA	36%	45%
Providing preventative care	27%	41%	26%	44% EU	35%	39%	34%	32 ★	23%	41% EU	22%	58% ★ NA SA EU AP
Attracting and retaining high quality clinicians	36%	39%	26%	50% ★ SA EU AP	56%	31%	42%	36%	31%	39%	43%	46% SA EU
Ensuring sufficient clinicians to meet patient demand	38%	35%	39%	31	47%	32%	43%	29 ★	33%	37% EU	42%	45% ★ NA SA EU
Providing access to digital tools (including AI) that help me make clinical decisions	44%	28	33%	28	62%	21%	54%	21 ★	37%	31% SA EU	55%	30%

By Region

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1753

Doctors' views of institutional performance

Doctors in Europe are less likely to rate the performance of their institutions as good than globally for AI (access, training and governance), as well as for ensuring sufficient clinicians to meet demand and providing preventative care (2/2)

Performance by my institution

% Very Poor / Poor & Very Good / Good	Doctors n= 1693 - 1753	North America n= 158 - 172	South America n= 126 - 131	Europe n= 329 - 353	Asia Pacific n= 964 - 981	Middle East & Africa n= 102 - 108
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	45% 25%	39% 30%	SA EU 67% 19%	55% 19% ★	38% 28%	SA EU 54% 24%
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	50% 23%	43% 20%	72% 18%	68% 14% ★	40% 27%	★ SA EU 54% 34% ★ NA SA EU

2/2

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1753

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Nurses' views of institutional performance

Nurses in Asia Pacific are more likely to rate the performance of their institutions as good than globally for most areas (1/2)

Performance by my institution

% Very Poor / Poor & Very Good / Good 1/2	Nurses n= 398 - 421	North America n= 87 - 92	South America n= 31 - 32	Europe n= 73 - 81	Asia Pacific n= 169 - 178	Middle East & Africa n= 37 - 38
Ensuring patient records are up to date	13% 73%	19% 67%	SA 25% 47% ★	17% 67%	SA 6% 82% ★ NA SA EU MA	29% 63%
Ensuring patient records are readily accessible (e.g. digitized)	15% 70%	18% 68%	31% 56%	16% 66%	9% 76% SA MA	29% 53% ★
Providing the most appropriate medical equipment to support clinicians and patients	19% 65%	21% 54%	42% 38% ★	20% 62%	SA 12% 75% ★ NA SA EU MA	37% 45% ★
Providing preventative care	20% 59%	28% 42% ★	26% 56%	32% 41% ★	12% 71% ★ NA EU	21% 61% EU
Attracting and retaining high quality clinicians	24% 56%	40% 39% ★	42% 38%	34% 39% ★	11% 72% ★ NA SA EU MA	42% 42%
Ensuring sufficient clinicians to meet patient demand	28% 51%	42% 42%	55% 35%	35% 38% ★	18% 61% ★ NA SA EU	34% 50%
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	41% 37%	50% 32%	58% 39%	51% 25% ★	32% 42% EU	38% 43%

By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 421

Nurses' views of institutional performance

Nurses in Asia Pacific are more likely to rate the performance of their institutions as good than globally for most areas (2/2)

Performance by my institution

% Very Poor / Poor **& Very Good / Good**	**Nurses** n= 398 - 421	**North America** n= 87 - 92	**South America** n= 31 - 32	**Europe** n= 73 - 81	**Asia Pacific** n= 169 - 178	**Middle East & Africa** n= 37 - 38
Providing access to digital tools (including AI) that help me make clinical decisions	34% 36%	31% 39%	40% 35%	49% 31%	25% 38%	46% 38%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	35% 33%	42% 30%	45% 32%	41% 27%	30% 35%	35% 41%

2/2

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 421

Clinicians' views of institutional performance

Clinicians in China are more likely to rate the performance of their institutions as good than globally in all areas.
Whereas, Japanese institutions are furthest behind in all areas than globally, according to clinicians (1/2)

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Performance by my institution

% Very Poor / Poor **&** Very Good / Good

	Clinicians 1/2 n= 2091 - 2174	USA n= 225 - 243	China n= 471 - 481	India n= 284 - 288	Japan n= 165 - 168	UK n= 97 - 108	Brazil n= 102 - 107
Ensuring patient records are up to date	17% 63%	13% 66% ᴶᴾ ᴮᴿ	3% 79% ᵁˢ ᴵᴺ ᴶᴾ ᵁᴷ ᴮᴿ ★	19% 66% ᴶᴾ ᴮᴿ	23% 50% ★	19% 67% ᴶᴾ ᴮᴿ	27% 48% ★
Ensuring patient records are readily accessible (e.g. digitized)	19% 63%	11% 70% ᴶᴾ ᴮᴿ ★	5% 75% ᴵᴺ ᴶᴾ ᴮᴿ ★	24% 62% ᴶᴾ	30% 47% ★	17% 66% ᴶᴾ	30% 58%
Providing the most appropriate medical equipment to support clinicians and patients	22% 57%	19% 56% ᴶᴾ ᴮᴿ	8% 74% ᵁˢ ᴵᴺ ᴶᴾ ᵁᴷ ᴮᴿ ★	18% 65% ᵁˢ ᴶᴾ ᴮᴿ ★	32% 43% ★	21% 60% ᴶᴾ ᴮᴿ	42% 42% ★
Providing preventative care	23% 50%	25% 45%	13% 61% ᵁˢ ᴶᴾ ᵁᴷ ★	14% 66% ᵁˢ ᴶᴾ ᵁᴷ ᴮᴿ ★	27% 39% ★	37% 39% ★	26% 55% ᴶᴾ ᵁᴷ
Attracting and retaining high quality clinicians	30% 48%	33% 46%	13% 63% ᴶᴾ ᵁˢ ᴶᴾ ᴮᴿ ★	19% 59% ᵁˢ ᴶᴾ ᴮᴿ ★	38% 32% ★	30% 52% ᴶᴾ	44% 39%
Ensuring sufficient clinicians to meet patient demand	33% 43%	38% 37%	19% 52% ᵁˢ ᴶᴾ ᵁᴷ ᴮᴿ ★	23% 59% ᵁˢ ᴶᴾ ᵁᴷ ᴮᴿ ★	40% 35% ★	42% 37%	45% 35%
Providing access to digital tools (including AI) that help me make clinical decisions	39% 32%	31% 34% ᴶᴾ	21% 43% ᵁˢ ᴵᴺ ᴶᴾ ᵁᴷ ᴮᴿ ★	38% 30% ᴶᴾ	47% 1 ★	44% 30 ᴶᴾ	51% 27

By Key Country

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all *clinicians* ★★

Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2174

Clinicians' views of institutional performance

Clinicians in China are more likely to rate the performance of their institutions as good than globally in all areas. Whereas, Japanese institutions are furthest behind in all areas than globally, according to clinicians (2/2)

Performance by my institution

%Very Poor / Poor & Very Good / Good		Clinicians 2/2 n= 2091 - 2174	USA n= 225 - 243	China n= 471 - 481	India n= 284 - 288	Japan n= 165 - 168	UK n= 97 - 108	Brazil n= 102 - 107
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians		45% 30%	46% 28% JP UK	21% 47%	48% 27% US IN JP UK BR ★	58% 9% ★	56% 17% ★	65% 29% JP UK
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)		40% 29%	37% 31% IN JP	20% 42%	42% 22% US IN JP UK BR ★	59% 9% JP ★	35% 27% JP	57% 27% JP

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2174

Doctors' views of institutional performance

Doctors in Japan are most likely to rate the performance of their institutions as poor than globally in all areas. When it comes to providing AI training, the UK is furthest behind, according to doctors (1/2)

Performance by my institution

%Very Poor / Poor & Very Good / Good 1/2	Doctors n= 1693 - 1753	USA n= 143 - 156	China n= 412 - 421	India n= 249 - 254	Japan n= 134 - 136	UK n= 70 - 77	Brazil n= 80 - 84
Ensuring patient records are readily accessible (e.g. digitized)	23% 56%	10% 67% ⭐ IN JP	10% 65% ⭐ IN	34% 46% ⭐ JP	44% 33% ⭐	17% 64% IN JP	29% 55% JP
Ensuring patient records are up to date	20% 54%	13% 61% IN JP	6% 65% ⭐ IN JP BR	29% 49%	30% 35% JP ⭐	21% 59% JP	28% 48%
Providing the most appropriate medical equipment to support clinicians and patients	25% 49%	18% 58% ⭐ JP BR	12% 57% ⭐ IN JP BR	27% 50%	42% 30% JP ⭐	27% 48% JP	49% 40%
Providing preventative care	27% 41%	24% 46% JP UK	19% 43% JP UK	23% 49% ⭐ JP UK	44% 24% ⭐	46% 26%	35% 45% ⭐ JP UK
Attracting and retaining high quality clinicians	36% 39%	25% 51% ⭐ IN JP BR	24% 43%	32% 40% JP	48% 1% JP ⭐	37% 38% JP	54% 35% JP
Ensuring sufficient clinicians to meet patient demand	38% 35%	37% 32%	26% 41% ⭐ JP	35% 40% US JP	52% 20% JP ⭐	49% 32% JP	40% 35% JP
Providing access to digital tools (including AI) that help me make clinical decisions	44% 28%	32% 29% JP	25% 36% ⭐ JP UK BR	43% 33% JP UK	60% 1% ⭐	50% 20%	60% 24% JP

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all *doctors* ⭐⭐
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1753

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Doctors' views of institutional performance

Doctors in Japan are most likely to rate the performance of their institutions as poor than globally in all areas. When it comes to providing AI training, the UK is significantly behind, according to doctors (2/2)

Performance by my institution

%Very Poor / Poor & Very Good / Good	Doctors n= 1693 - 1753	USA n= 143 - 156	China n= 412 - 421	India n= 249 - 254	Japan n= 134 - 136	UK n= 70 - 77	Brazil n= 80 - 84
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	45% 25%	38% 31% JP	22% 32% JP	45% 30% ★ JP	70% 12% ★	40% 24% JP	64% 23% JP
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	50% 23%	42% 21% JP UK	23% 34%	50% 26% US IN JP UK BR ★ JP UK	71% 9% ★	67% 10% ★	70% 22% JP UK

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors
★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1753

Nurses' views of institutional performance

Nurses in China are significantly more likely to rate the performance of their institutions as good than globally in most areas. Japan is furthest behind for providing AI governance and training, according to nurses (1/2)

Performance by my institution

% Very Poor / Poor & Very Good / Good (1/2)

	Nurses n= 398 - 421	USA n= 82 - 87	China n= 59 - 60	India n= 33 - 35	Japan n= 31 - 32	UK n= 27 - 31	Brazil n= 22 - 23
Ensuring patient records are up to date	13% / 73%	13% / 71%	0% / 93% (US UK ★)	9% / 83%	16% / 66%	16% / 74%	
Ensuring patient records are readily accessible (e.g. digitized)	15% / 70%	11% / 72%	0% / 85% (JP ★)	14% / 77%	16% / 63%	16% / 68%	
Providing the most appropriate medical equipment to support clinicians and patients	19% / 65%	21% / 53% (★)	5% / 90% (US UK ★)	9% / 80% (US JP)	22% / 56%	16% / 71%	
Providing preventative care	20% / 59%	26% / 45% (★)	7% / 80% (JP UK ★)	6% / 83% (US UK ★)	9% / 53%	29% / 52%	Too few responses
Attracting and retaining high quality clinicians	24% / 56%	40% / 41% (★)	2% / 82% (US JP ★)	6% / 77% (US JP ★)	28% / 50%	23% / 65% (US)	
Ensuring sufficient clinicians to meet patient demand	28% / 51%	39% / 43%	12% / 63% (US ★)	11% / 77% (US JP UK ★)	28% / 50%	35% / 42%	
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	41% / 37% (JP)	49% / 34%	18% / 60% (US IN JP UK ★)	45% / 27%	45% / 1 (★)	47% / 23%	

By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 421

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Nurses' views of institutional performance

Nurses in China are significantly more likely to rate the performance of their institutions as good than globally in most areas. Japan is furthest behind for providing AI governance and training, according to nurses (2/2)

Performance by my institution

%Very Poor / Poor & Very Good / Good 2/2	Nurses n= 398 - 421	USA n= 82 - 87	China n= 59 - 60	India n= 33 - 35	Japan n= 31 - 32	UK n= 27 - 31	Brazil n= 22 - 23
Providing access to digital tools (including AI) that help me make clinical decisions	34% 36%	29% 39%	17% 49%	IN JP 33% 27%	34% 25%	39% 39%	Too few responses
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	35% 33%	37% 32%	JP 19% 53%	US IN JP 38% 15% ★	48% 6% ★		

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 421

Clinicians' views of national government performance

Nearly six in ten (59%) clinicians rate their national governments as good at making healthcare accessible to all, but only just over a third (36%) think governments are doing a good job of funding clinical research. Nurses rate performance higher across all areas.

Performance by my national government

%Very Poor / Poor & Very Good / Good	Clinicians n= 2144 - 2173		Doctors n= 1737 - 1754			Nurses n= 407 - 419		
Making healthcare accessible to all	23%	59%	27%	50%	★	20%	69%	★ DR
Providing preventative care	27%	48%	32%	39%	★	23%	56%	★ DR
Ensuring adequate workforce capacity	39%	40%	44%	30%	★	34%	49%	★ DR
Funding healthcare (including new hospitals)	34%	37%	41%	33%	★	27%	41%	DR
Funding clinical research	38%	36%	48%	27%	★	27%	45%	★ DR

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2144 - 2173

70

Clinicians' views of national government performance

Around half of clinicians in North America (48-53%) rate their national government as poor for all listed healthcare challenges, significantly more than globally

Performance by my national government

%Very Poor / Poor & Very Good / Good	Clinicians n= 2144 - 2173	North America n= 254 - 264	South America n= 162 - 164	Europe n= 420 - 430	Asia Pacific n= 1138 - 1156	Middle East & Africa n= 143 - 144
Making healthcare accessible to all	23% 59%	53% 31% ★	39% 46% ★ NA	20% 61% SA NA MA	14% 68% ★ NA SA EU MA	32% 49% ★ NA
Providing preventative care	27% 48%	48% 28% ★	38% 39% ★ NA	34% 35% ★	19% 58% ★ NA SA EU	24% 54% NA SA EU
Ensuring adequate workforce capacity	39% 40%	52% 29% ★	58% 25% ★	51% 26% ★	28% 51% ★ NA SA EU MA	40% 36% SA EU
Funding healthcare (including new hospitals)	34% 37%	49% 25% ★	49% 32% ★	45% 28% ★	24% 44% ★ NA SA EU	39% 38% NA EU
Funding clinical research	38% 36%	49% 28% ★	64% 26% ★	46% 27% ★	26% 44% ★ NA SA EU MA	51% 29%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2144 - 2173

Doctors' views of national government performance

Doctors in North America rate their national governments' performance poorer for all listed attributes compared to globally

Performance by my national government

%Very Poor / Poor & Very Good / Good	Doctors n= 1737 - 1754	North America n= 168 - 174	South America n= 132 - 132	Europe n= 344 - 351	Asia Pacific n= 965 - 980	Middle East & Africa n= 105 - 106	
Making healthcare accessible to all	27% 50%	59% 20% ★ NA	41% 39% ★ NA	22% 55% SA NA	19% 56% ★ NA SA	35% 47%	NA
Providing preventative care	32% 39%	55% 22% ★	43% 32%	33% 35% NA	25% 44% ★ NA SA EU	26% 52%	★ NA SA EU
Funding healthcare (including new hospitals)	41% 33	57% 23% ★	52% 28%	46% 26% ★	33% 38% ★ NA SA EU	46% 38%	NA EU
Ensuring adequate workforce capacity	44% 30	52% 24%	61% 23%	52% 23% ★	37% 35% ★ NA SA EU	44% 37%	NA SA EU
Funding clinical research	48% 27	60% 20% ★	72% 18% ★	56% 21% ★	37% 34% ★ NA SA EU MA	63% 21%	

Significantly higher/ lower than all doctors
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

★ ★

By Region

Clinicians | Doctors | Nurses

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 1737 - 1754

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Nurses' views of national government performance

Nurses in Asia Pacific rate their national governments' performance higher for making healthcare accessible and ensuring adequate workforce capacity, compared to all regions

Performance by my national government

%Very Poor / Poor & **Very Good / Good**	**Nurses** n= 407 - 419	**North America** n= 86 - 92	**South America** n= 30 - 32	**Europe** n= 75 - 80	**Asia Pacific** n= 173 - 178	**Middle East & Africa** n= 37 - 38
Making healthcare accessible to all	20% 69%	47% 41% ★	38% 53%	18% 66% NA	10% 81% ★ NA SA EU MA	29% 50% ★
Providing preventative care	23% 56%	41% 35% ★	32% 47%	34% 36% ★	14% 71% ★ NA SA EU	21% 55% NA EU
Ensuring adequate workforce capacity	34% 49%	52% 34% ★	54% 27% ★	50% 28% ★	20% 67% ★ NA SA EU MA	37% 34%
Funding clinical research	27% 45%	39% 35%	57% 34%	36% 34%	15% 53% NA SA EU	39% 37%
Funding healthcare (including new hospitals)	27% 41%	42% 27% ★	45% 35%	43% 29% ★	14% 50% ★ NA EU	32% 38%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses
★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 407 - 419

ELSEVIER

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Clinicians' views of national government performance

Around one in two clinicians in the USA (50-56%) rate their national governments' performance as poor for all listed attributes (lower than average)

ELSEVIER

Performance by my national government

% Very Poor / Poor & Very Good / Good

	Clinicians (n= 2144 - 2173)	USA (n= 233 - 243)	China (n= 468 - 479)	India (n= 286 - 287)	Japan (n= 166 - 167)	UK (n= 103 - 108)	Brazil (n= 107 - 108)
Making healthcare accessible to all	23% 59%	56% 28 ★	5% 80% (US IN JP UK BR ★)	17% 69% (US UK BR ★)	21% 55% (US)	18% 58% (US)	36% 48% (US ★)
Providing preventative care	27% 48%	50% 27 ★	10% 66% (US JP UK BR ★)	21% 62% (US UK BR ★)	28% 38% (US ★)	35% 40% (US)	33% 44% (US)
Ensuring adequate workforce capacity	39% 40%	51% 29 ★	15% 60% (US JP UK BR ★)	29% 55% (US UK BR ★)	55% 28 ★	49% 30	55% 25% (US ★)
Funding healthcare (including new hospitals)	34% 37%	53% 24 ★ (JP)	11% 49% (US JP UK BR ★)	25% 55% (US UK BR ★)	47% 13% ★	44% 30 (JP)	48% 33% (JP)
Funding clinical research	38% 36%	51% 25 ★	10% 51% (US JP UK BR ★)	32% 49% (US UK BR ★)	51% 18% ★	34% 34% (JP)	61% 28% (JP)

By Key Country

Clinicians	Doctors	Nurses

★ ★ Significantly higher/ lower than all clinicians
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2144 - 2173

Doctors' views of national government performance
More doctors in China rate their national governments' performance as good compared to all key countries

ELSEVIER

Performance by my national government

% Very Poor / Poor & Very Good / Good	Doctors n= 1737 - 1754	USA n= 152 - 158	China n= 408 - 419	India n= 251 - 253	Japan n= 134 - 135	UK n= 74 - 77	Brazil n= 85 - 85
Making healthcare accessible to all	27% 50%	62% 18% ★	10% 64% US IN JP BR ★	28% 49% US	21% 51% US	19% 55% US BR	41% 39% US ★
Providing preventative care	32% 39%	56% 21% ★	17% 50% US JP UK BR ★	29% 45% US JP	38% 21% ★	39% 35% US JP	45% 35% US JP
Funding healthcare (including new hospitals)	41% 33%	58% 22% JP ★	20% 45% US UK BR ★	38% 40% US ★	63% 11% US ★	52% 27% JP	51% 29% JP
Ensuring adequate workforce capacity	44% 30%	52% 25% JP	23% 40% US UK BR ★	42% 37% JP US BR ★	70% 10% ★	53% 22% JP	60% 22% JP
Funding clinical research	48% 27%	61% 19% ★	19% 44% US IN JP UK BR ★	47% 30% US JP	67% 12% ★	50% 23% JP	69% 21% JP

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors
★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 1737 - 1754

Nurses' views of national government performance

Around nine in ten nurses in China (95%) and India (89%) rate their national governments as good for making healthcare accessible to all (higher than average)

ELSEVIER

Performance by my national government

% Very Poor / Poor & Very Good / Good	Nurses n= 407 - 419	USA n= 81 - 87	China n= 60 - 60	India n= 34 - 35	Japan n= 32 - 32	UK n= 29 - 31	Brazil n= 22 - 23
Making healthcare accessible to all	20% 69%	51% 38% ★	0% 95% US UK ★	6% 89% US UK ★	22% 59% US	16% 61% US	
Providing preventative care	23% 56%	44% 34% ★	3% 82% US JP UK ★	12% 79% US UK ★	19% 56% US	32% 45%	Too few responses
Ensuring adequate workforce capacity	34% 49%	51% 33% ★	7% 80% US JP UK ★	17% 71% US JP UK ★	41% 47%	45% 39%	
Funding clinical research	27% 45%	41% 32% ★	2% 58% US JP ★	17% 69% US JP ★	34% 25%	★	
Funding healthcare (including new hospitals)	27% 41%	48% 25% ★	2% 53% US JP	11% 69% US JP UK ★	31% 16%	★ 37% 33%	

By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all *nurses* ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 1 is very poor, 5 is very good and the midpoint 3 is neutral.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 407 - 419

76

AI Helping Transform Healthcare

How AI impacts clinicians

Over half of clinicians currently think that AI tools developed to support clinical decision-making save them time (57%) and empower them (53%). 53% believe it gives them more choice, particularly among nurses (58%)

% Perceive Negatively/ Positively	Clinicians n= 2206	Doctors n= 1781		Nurses n= 425	
Take up my time / Save me time	18% 57%	21% 53%	★	15% 61%	DR
Devalue me / Empower me	20% 53%	23% 50%		17% 56%	DR
Give me less choice / Give me more choice	18% 53%	20% 47%	★	16% 58%	DR
Provide unhelpful answers / Provide useful answers	21% 49%	23% 45%	★	19% 53%	DR
Reduce my autonomy / Increase my autonomy	24% 40%	29% 35%	★	20% 45%	★ DR
Unreliable / Trustworthy	26% 40%	28% 32%	★	23% 47%	★ DR

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: How do you perceive AI tools developed to support clinical decision-making?

Base: n= 2206

How AI impacts clinicians

More clinicians in Asia Pacific currently think that AI tools developed to support clinical decision-making affect them positively compared to the rest of the world

% Perceive Negatively / Positively	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Take up my time / Save me time	18% 57%	22% 47% ★	20% 56% (NA)	21% 51% ★	15% 62% ★ (NA EU)	16% 55%
Devalue me / Empower me	20% 53%	31% 30% ★	22% 60% (NA EU)	24% 45% ★ (NA)	15% 61% ★ (NA EU MA)	24% 49% (NA)
Give me less choice / Give me more choice	18% 53%	29% 25% ★	14% 58% (NA EU)	18% 46% ★ (NA)	15% 60% ★ (NA EU MA)	26% 51% (NA)
Provide unhelpful answers / Provide useful answers	21% 49%	27% 36% ★	22% 51% (NA)	22% 45% (NA)	18% 54% ★ (NA EU MA)	31% 43%
Reduce my autonomy / Increase my autonomy	24% 40%	33% 28% ★	28% 45% (NA)	29% 37% (NA)	20% 43% (NA EU)	21% 39% (NA)
Unreliable / Trustworthy	26% 40%	37% 20% ★	24% 39% (NA EU)	31% 29% ★ (NA)	21% 49% ★ (NA SA EU MA)	28% 39% (NA EU)

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: How do you perceive AI tools developed to support clinical decision-making?
Base: n= 2206

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How AI impacts doctors

Only around one in four doctors in North America (24%) currently think AI tools developed to support clinical decision-making give them more choice, compared to nearly one in two globally (47%)

% Perceive Negatively/ Positively	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Take up my time / Save me time	21% 53%	24% 44% ★	22% 56% NA	24% 47% ★	19% 57%	NA EU 21% 54%
Devalue me / Empower me	23% 50%	27% 30 ★	25% 58% NA EU	23% 44% ★ NA	21% 56%	★ NA EU 28% 49% NA
Give me less choice / Give me more choice	20% 47%	29% 24% ★	16% 57% ★ NA EU	21% 38% ★ NA	18% 54%	★ NA EU 25% 55% NA EU
Provide unhelpful answers / Provide useful answers	23% 45%	28% 34% ★	22% 52% NA EU	23% 41%	22% 48%	NA EU 28% 44%
Reduce my autonomy / Increase my autonomy	29% 35%	38% 22% ★	24% 43% NA	29% 34% NA	28% 37%	NA 24% 39% NA
Unreliable / Trustworthy	28% 32%	38% 19% ★	23% 34% NA EU	35% 25% ★	24% 38%	★ NA EU 28% 38% NA EU

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: How do you perceive AI tools developed to support clinical decision-making?

Base: 1781

ELSEVIER

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How AI impacts nurses

Around two thirds of nurses in Asia Pacific (61-67%) currently think that AI tools developed to support clinical decision-making are trustworthy, give them more choice and empower them (higher than average)

% Perceive Negatively / Positively	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Take up my time / Save me time	15% 61%	21% 49% ★	19% 57%	18% 54%	12% 67%	NA EU 11% 55%
Give me less choice / Give me more choice	16% 58%	29% 26% ★	12% 60% NA	15% 54% NA	12% 67%	★ NA EU MA 26% 47% NA
Devalue me / Empower me	17% 56%	35% 30% ★	19% 62% NA	24% 47% NA	9% 65%	★ NA EU 21% 50% NA
Provide unhelpful answers / Provide useful answers	19% 53%	27% 38% ★	22% 50%	21% 50%	14% 59%	NA 34% 42%
Unreliable / Trustworthy	23% 47%	37% 21% ★	25% 44% NA	27% 32 ★	17% 61%	★ NA EU MA 29% 39% NA
Reduce my autonomy / Increase my autonomy	20% 45%	29% 34% ★	31% 47%	29% 41%	12% 50%	NA 18% 39%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: How do you perceive AI tools developed to support clinical decision-making?
Base: 425

Back to home

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How AI impacts clinicians

More clinicians in China are positive about AI, notably (74%) compared to globally (57%) currently think AI tools developed to support clinical decision-making save them time

% Perceive Negatively / Positively	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Take up my time / Save me time	18% 57%	22% 46% ★	12% 74% (US IN JP UK BR ★)	21% 49% ★	14% 66% (US IN UK ★)	26% 43% ★	20% 57% (UK)
Devalue me / Empower me	20% 53%	31% 31% ★	11% 68% (US IN UK ★)	19% 56% (US UK)	11% 61% (US UK ★)	28% 35% ★	19% 63% (US UK)
Give me less choice / Give me more choice	18% 53%	29% 25% ★	11% 71% (US IN JP UK BR ★)	20% 54% (US UK)	13% 54% (US UK)	18% 39% (US ★)	15% 56% (US UK)
Provide unhelpful answers / Provide useful answers	21% 49%	28% 37% ★	13% 63% (US IN JP UK BR ★)	20% 50% (US UK)	18% 46%	24% 39% ★	19% 50% (US)
Reduce my autonomy / Increase my autonomy	24% 40%	34% 26% ★	12% 53% (US IN JP UK ★)	25% 34% (US ★)	23% 41% (US UK)	29% 28% ★	25% 46% (IN US UK)
Unreliable / Trustworthy	26% 40%	35% 20% ★	14% 61% (US IN JP UK BR ★)	29% 39% (US UK)	17% 50% (US IN UK BR ★)	33% 23% ★	25% 37% (US UK)

By Key Country

Clinicians · Doctors · Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: How do you perceive AI tools developed to support clinical decision-making?
Base: n= 2206

How AI impacts doctors

Doctors in China are most likely to perceive AI tools for clinical decision-making as positive than globally in all areas

% Perceive Negatively/ **Positively**	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Take up my time / Save me time	21% 53%	24% 46%	16% 62% US IN UK ★	24% 43% ★	19% 65% US IN UK ★	33% 37% ★	18% 61% IN US UK
Devalue me / Empower me	23% 50%	26% 30 ★	18% 62% US IN UK ★	29% 47% US	15% 59% US IN UK ★	31% 38% ★	21% 60% IN US UK
Give me less choice / Give me more choice	20% 47%	31% 25 ★	14% 61% US IN UK ★	25% 44% US	15% 51% US	23% 40% US	12% 60% IN US UK ★
Provide unhelpful answers / Provide useful answers	23% 45%	28% 36 ★	19% 53% US IN JP UK ★	26% 42%	21% 40%	28% 32 ★	21% 52% US UK
Reduce my autonomy / Increase my autonomy	29% 35%	39% 22 ★	23% 44% US IN JP ★	36% 28% ★	28% 34% US	35% 33%	20% 44% IN US
Unreliable / Trustworthy	28% 32	37% 19 ★	19% 44% US IN UK ★	32% 29% US	26% 36% US	37% 24	24% 35% US

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all *doctors* ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: How do you perceive AI tools developed to support clinical decision-making?

Base: 1781

83

How AI impacts nurses

Nurses in China are most likely to perceive AI tools for clinical decision-making as positive than globally across all areas, whereas nurses in the USA are significantly less positive in all areas

% **Perceive Negatively**/ **Positively**	**Nurses** n= 425	**USA** n= 87	**China** n= 60	**India** n= 35	**Japan** n= 33	**UK** n= 31	**Brazil** n= 23
Take up my time / Save me time	15% 61%	21% 47% ★	7% 85% US IN JP UK ★	17% 54%	9% 67%	19% 48%	
Give me less choice / Give me more choice	16% 58%	28% 24% ★	7% 82% US IN JP UK ★	14% 63% US	12% 58% US	13% 39%	★
Devalue me / Empower me	17% 56%	37% 31% ★	5% 73% US UK ★	9% 66% US UK	6% 64% US UK	26% 32%	★ Too few responses
Provide unhelpful answers / Provide useful answers	19% 53%	28% 38% ★	8% 72% US UK ★	14% 57%	15% 52%	19% 45%	
Unreliable / Trustworthy	23% 47%	33% 21% ★	8% 78% US IN UK ★	26% 49%	9% 64% US UK	29% 23%	★
Reduce my autonomy / Increase my autonomy	20% 45%	30% 30% ★	2% 62% US IN UK ★	14% 40%	18% 48% UK	23% 23%	★

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses   ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: How do you perceive AI tools developed to support clinical decision-making?

Base: 425

Are AI tools used in clinical practice?

Nearly half of clinicians (48%) use an AI product for work purposes

	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425
Yes – for a work purpose	48%	48%	49%
Yes - for a non-work purpose	28%	26	30%
No	21%	23	19
Don't know / not sure	3%		

Clinicians who used AI products for a work purpose
• 2024: 26%

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★

Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Do you use an AI (including generative AI) product?

Base: n= 2206

Back to home

Are AI tools used in clinical practice?

Clinicians in South America are most likely to have used AI tools for a work purpose (57%)

	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Yes – for a work purpose	48%	37% ★	57% ★ NA EU	32% ★	56% ★ NA EU MA	47% EU
Yes - for a non-work purpose	28%	21 ★	22%	37% ★ SA NA AP MA	27%	27%
No	21%	37% ★ SA EU AP MA	18%	29% ★ SA AP MA	14% ★	19%
Don't know / not sure	3%	5%	3%	3%	3%	7% ★ EU AP

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★

Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Do you use an AI (including generative AI) product?

Base: n= 2206

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ELSEVIER

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Are AI tools used in clinical practice?

Doctors in North America are least likely to have used an AI tool at all (40% haven't) compared to globally

	Doctors n= 1781		North America n= 176		South America n= 132		Europe n= 358		Asia Pacific n= 990		Middle East & Africa n= 109	
Yes – for a work purpose	48%		35%	★	63%	★ NA EU MA	31%	★	55%	★ NA EU	46%	EU
Yes - for a non-work purpose	26%		23		17%	★	33%	★ SA NA AP	25%	SA	28%	SA
No	23		40%	★ SA AP MA	15%	★	33%	★ SA AP MA	16%	★	20%	
Don't know / not sure	4%		3%		5%		3%		3%		6%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

★ ★

Question: Do you use an AI (including generative AI) product?

Base: n= 1781

87

Are AI tools used in clinical practice?

Nurses in Europe are least likely to have used an AI tool for a work purpose (34%) compared to globally

	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Yes – for a work purpose	49%	40%	50%	34% ★	57%	NA EU 47%
Yes - for a non-work purpose	30%	20% ★	28%	40% NA	29%	26%
No	19%	34% ★ AP	22%	24% AP	12%	18%
Don't know / not sure	3%	7% AP	0%	2%	2%	3%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Do you use an AI (including generative AI) product?

Base: n= 425

Are AI tools used in clinical practice?

Nearly three in four clinicians in China have used AI tools for a work purpose (71%)

	Clinicians n= 2206	USA n= 247		China n= 481		India n= 292		Japan n= 170		UK n= 109		Brazil n= 108	
Yes – for a work purpose	48%	36%	★	71%	★ US IN JP UK BR	41%	★	47%		34% US UK	★	55%	US IN UK
Yes - for a non-work purpose	28%	21	★	24%		32%	CH US	32%	US CH	31%	US	24%	
No	21%	38%	★ CH IN JP BR	3%	★	24%	CH	18	CH	32%	★ CH JP BR	19%	CH
Don't know / not sure	3%	6%	CH	2%	★	4%	CH	3%		2%		2%	

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Do you use an AI (including generative AI) product?

Base: n= 2206

Are AI tools used in clinical practice?

Doctors in the UK are least likely to have used AI tools for a work purpose (21%) compared to globally

	Doctors n= 1781	USA n= 160		China n= 421		India n= 257		Japan n= 137		UK n= 78		Brazil n= 85	
Yes – for a work purpose	48%	36%	★ UK	69%	★ US IN JP UK	33%	★ UK	60%	★ US IN UK	21	★	62%	★ US IN UK
Yes - for a non-work purpose	26%	22		25%	JP	29%	JP BR	16%	★	33%	JP BR	18%	
No	23	39%	★ CH JP BR	2%	★	33%	★ CH JP BR	23%	CH	45%	★ CH JP BR	15%	CH
Don't know / not sure	4%	3%		3%		5%		1%	JP	1%		5%	

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Do you use an AI (including generative AI) product?

Base: n= 1781

90

Are AI tools used in clinical practice?

Nearly three in four nurses in China have used AI tools for a work purpose (73%)

	Nurses n= 425	USA n= 87		China n= 60		India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Yes – for a work purpose	49%	37%	★	73%	★ US IN JP UK	49%	33%	48%	
Yes - for a non-work purpose	30%	20	★	23%		34%	48%	★ US CH 29%	Too few responses
No	19	36%	★ CH IN JP 3%		★	14%	CH 1	19	CH
Don't know / not sure	3%		★ CH 0%			3%	6%	3%	

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses
★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Do you use an AI (including generative AI) product?

Base: n= 425

Use of generalist AI tools by clinicians in practice

Of the 48% of clinicians who use AI for work, nearly all (97%) have used a generalist AI tool

Use generalist AI tools (e.g. ChatGPT/ Bard) for work purposes

	Clinicians N= 1054	Doctors N= 863	Nurses N= 191
Never	3%	3%	3%
Rarely	8%	8%	8%
Occasionally	38%	36%	41%
Frequently	41%	44%	38%
Always	9%	9%	9%

Overall

Clinicians	Doctors	Nurses

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 1054

Use of generalist AI tools by clinicians in practice by region

Of clinicians who use AI for work, North Americans and Europeans are using generalist AI tools less frequently (significantly more say they use them rarely or never than globally)

Use generalist AI tools (e.g. ChatGPT/ Bard) for work purposes

	Clinicians n= 1054	North America n= 96		South America n= 99		Europe n= 141		Asia Pacific n= 637		Middle East & Africa n= 68
Never	3%	9%	★ AP MA	7%	AP MA	7%	★	1%	★	0%
Rarely	8%	20%	★ SA AP MA	8%		19%	★ SA AP MA	4%	★	8%
Occasionally	38%	37%		29%		34%		41%		SA 37%
Frequently	41%	31%		38%		32%	★	45%		NA EU 45%
Always	9%	3%	★	17%	★ NA EU AP	7%		9%		NA 10%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 1054

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Use of generalist AI tools by doctors in practice by region

Of doctors who use AI for work, North Americans and Europeans are using generalist AI tools less frequently (significantly more say they use them rarely than globally)

Use generalist AI tools (e.g. ChatGPT/ Bard) for work purposes

	Doctors n= 863	North America n= 61	South America n= 83	Europe n= 112	Asia Pacific n= 545	Middle East & Africa n= 50
Never	3%	5%	7% ★ AP	6% AP	2%	0%
Rarely	8%	28% SA EU AP MA ★	5%	14% ★ SA AP	5% ★	10%
Occasionally	36%	31%	37%	36%	36%	36%
Frequently	44%	33%	40%	37%	49%	NA EU 40%
Always	9%	3%	11%	8%	9%	14% NA

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *doctors* ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 863

ELSEVIER

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Use of generalist AI tools by nurses in practice by region
Of North American nurses who have used AI for work, 13% have never used a generalist AI tool for work

Use generalist AI tools (e.g. ChatGPT/ Bard) for work purposes

	Nurses n= 191	North America n= 35	South America n= 16	Europe n= 29	Asia Pacific n= 92	Middle East & Africa n= 18
Never	3%	13% AP ★			1%	
Rarely	8%	13% AP	Too few responses		3%	Too few responses
Occasionally	41%	42%			46%	
Frequently	38%	30%			41%	
Always	9%	3%			9%	

By Region

Clinicians   Doctors   **Nurses**

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 191

95

Use of generalist AI tools by clinicians in practice by country

Of clinicians who use AI for work, around one in five always use generalist AI tools in India (16%) and Brazil (20%)

Use generalist AI tools (e.g. ChatGPT/ Bard) for work purposes

	Clinicians n= 1054	USA n= 89	China n= 336	India n= 102	Japan n= 93	UK n= 31	Brazil n= 64
Never	3%	11%	★ CH IN JP 1% ★	1%	0%	4%	3%
Rarely	8%	22%	★ CH IN JP 3% ★	3%	2% ★	22%	★ CH IN JP 12% — CH IN JP
Occasionally	38%	37%	38%	BR 47%	BR 63%	★ US CH IN UK BR 34%	23% ★
Frequently	41%	28% ★	52%	★ US IN JP UK 33%	27% ★	30%	41%
Always	9%	3%	6%	16% ★ CH US	9%	10%	20% ★ CH US JP

By Key Country

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all *clinicians* ★ ★

Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 1054

Use of generalist AI tools by doctors in practice by country
Of doctors who use AI for work, more than half frequently use generalist AI tools in China (54%)

Use generalist AI tools (e.g. ChatGPT/ Bard) for work purposes

	Doctors n= 863	USA n= 57	China n= 292	India n= 85	Japan n= 82	UK n= 16	Brazil n= 53
Never	3%	5%	JP 2%	2%	0%		6% JP
Rarely	8%	28%	★ CH IN JP BR 4% ★	7%	2%		8%
Occasionally	36%	30%	32%	46%	CH 48%	★ US CH	34%
Frequently	44%	33%	54% ★ US IN JP BR	39%	41%		38%
Always	9%	4%	8%	6%	9%		15% US

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 863

Use of generalist AI tools by nurses in practice by country
Of nurses who use AI for work, all have used a generalist AI tool in China (100%)

Use generalist AI tools (e.g. ChatGPT/ Bard) for work purposes

	Nurses n= 191	USA n= 32	China n= 44	India n= 17	Japan n= 11	UK n= 15	Brazil n= 11
Never	3%	16% ★ CH	CH 0%				
Rarely	8%	16%	CH 2%		Too few responses		
Occasionally	41%	44%	43%				
Frequently	38%	22%	50% US				
Always	9%	3%	5%				

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 191

Use of clinical-specific AI tools by clinicians in practice

Fewer of the 48%, approximately three quarters (76%), have used a clinical-specific AI tool. Meaning approximately a quarter of clinicians using an AI tool have relied on a generalist AI tool

Use clinical-specific AI tools (e.g. Open Evidence/ Merative) for work purposes

	Clinicians N= 1054	Doctors N= 863	Nurses N= 191	
Never	24%	28%	NU 21%	★
Rarely	26%	24%	27%	
Occasionally	28%	24%	32%	★ DR
Frequently	18%	19%	18%	
Always	4%	5%	2%	

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 1054

Use of clinical-specific AI tools by clinicians in practice by region

Among AI-using clinicians for work, fewer have used a clinical-specific AI tool in South America and Europe (66%) than globally

Use clinical-specific AI tools (e.g. Open Evidence/ Merative) for work purposes

	Clinicians n= 1054	North America n= 96	South America n= 99		Europe n= 141		Asia Pacific n= 637	Middle East & Africa n= 68	
Never	24%	23%	34%	★ AP	34%	★ AP	21%	23%	
Rarely	26%	20%	15%	★	29%		28% SA	22% SA	
Occasionally	28%	32% SA EU	19%	★	14%	★	32%	38% SA EU	SA EU
Frequently	18%	22%	22%		20%		17%	15%	
Always	4%	4%	11%	★ EU AP MA	3%		3%	2%	

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 1054

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Use of clinical-specific AI tools by doctors in practice by region

Among AI-using doctors for work, over two in five have relied on a generalist AI tool in Europe (42%)

Use clinical-specific AI tools (e.g. Open Evidence/ Merative) for work purposes

	Doctors n= 863	North America n= 61	South America n= 83	Europe n= 112	Asia Pacific n= 545	Middle East & Africa n= 50
Never	28%	26%	27%	42% ★ SA NA AP	25%	30%
Rarely	24%	18%	17%	16% ★	29%	22% SA EU
Occasionally	24%	28%	19%	20%	26%	20%
Frequently	19%	26%	23% AP	20%	16%	24%
Always	5%	2%	14% ★ NA EU AP	3%	4%	4%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *doctors* ★★

Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 863

Use of clinical-specific AI tools by nurses in practice by region

Among AI-using nurses for work, nearly four in five have used a clinical-specific AI tool (79%)

Use clinical-specific AI tools (e.g. Open Evidence/ Merative) for work purposes

	Nurses n= 191	North America n= 35	South America n= 16	Europe n= 29	Asia Pacific n= 92	Middle East & Africa n= 18
Never	21	20%			16%	
Rarely	27%	22%	Too few responses		27%	Too few responses
Occasionally	32%	35%			37%	
Frequently	18	18%			18%	
Always		5%			1%	

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 191

Back to home

Use of clinical-specific AI tools by clinicians in practice by country

Among AI-using clinicians for work, fewer have used a clinical-specific AI tool in Japan (48%) than globally

Use clinical-specific AI tools (e.g. Open Evidence/ Merative) for work purposes

	Clinicians n= 1054	USA n= 89	China n= 336	India n= 102	Japan n= 93	UK n= 31	Brazil n= 64
Never	24%	26%	CH 14% ★	20%	52% ★ US CH IN UK BR	21%	34% CH IN
Rarely	26%	16%	31% ★ US JP BR	25%	20%	36%	US BR 18%
Occasionally	28%	29%	32%	JP BR 36%	JP UK BR 19%	15%	16% ★
Frequently	18%	25%	JP 20%	JP 17%	JP 5% ★	20%	JP 20% JP
Always	4%	4%	3%	1%	3%	8%	IN 12% ★ CH IN JP

By Key Country

Clinicians — Doctors — Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 1054

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Use of clinical-specific AI tools by doctors in practice by country

Among AI-using doctors for work, more have used a clinical-specific AI tool in China (80%) than globally

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Use clinical-specific AI tools (e.g. Open Evidence/ Merative) for work purposes

	Doctors n= 863	USA n= 57	China n= 292	India n= 85	Japan n= 82	UK n= 16	Brazil n= 53
Never	28%	26%	20% ★	24%	51%	★ US CH IN BR	19%
Rarely	24	14%	30% ★ US BR	27%	27%	Too few responses	17%
Occasionally	24	30%	JP 26%	JP 29%	JP 15%		15%
Frequently	19	28%	JP 20%	JP 16%	JP 2% ★		28% JP
Always	5%	2%	4%	4%	5%		21% ★ CH US IN JP

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 863

Use of clinical-specific AI tools by Nurses in practice by country

Among AI-using nurses for work, nearly four in five have used a clinical-specific AI tool (79%)

Use clinical-specific AI tools (e.g. Open Evidence/ Merative) for work purposes

	Nurses n= 191	USA n= 32	China n= 44	India n= 17	Japan n= 11	UK n= 15	Brazil n= 11
Never	21	25	9%				
Rarely	27	19	32%	Too few responses			
Occasionally	32%	28	36%				
Frequently	18	22	20%				
Always	2%	6%	2%				

By Key Country

Clinicians   Doctors   **Nurses**

Significantly higher/ lower than all nurses ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.
Base: n= 191

How clinicians use and would like to use AI tools in clinical practice

The most common tasks clinicians use (any) AI tool for are identifying drug interactions and writing patient letters (1/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/
Would like to use AI/
Already using AI

1/2

	Clinicians n= 1687 - 2024			Doctors n= 1384 - 1654			Nurses n= 303 - 370		
Identify drug interactions	11%	59%	30%	8%	63%	29%	13%	55%	32%
Write patient letters	22%	55%	23%	22%	58%	19%★	22%	51%	27%
Write clinical notes	23%	55%	22%	20%	61%	19%★	25%	50%	25%
Provide a second opinion on a complex case	27%	51%	22%	25%	56%	19%★	29%	46%	25%
Analyze medical images (X-rays, MRIs, CT etc)	18%	60%	21%	15%	66%	19%	22%	54%	23%
Provide multiple disciplinary overview for complex cases	23%	57%	21%	19%	60%	21%	27%	53%	20%
Provide a patient's medication summary	19%	62%	20%	16%	67%	18%	22%	56%	22%

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.
Base: n= 2024

How clinicians use and would like to use AI tools in clinical practice

The most common tasks clinicians use (any) AI tool for are identifying drug interactions and writing patient letters (1/2)

Use of AI in your clinical setting to help with tasks

%**Wouldn't like to use AI**/ **Would like to use AI**/ **Already using AI**	2/2	**Clinicians** n= 1687 - 2024	**Doctors** n= 1384 - 1654	**Nurses** n= 303 - 370
Write pre-authorizations (for payers)		23% · 60% · 17%	20% · 62% · 17%	26% · 58% · 17%
Make clinical decisions		37% · 48% · 16%	34% · 50% · 17%	40% · 45% · 15%

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★

Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 2024

Clinicians current use of clinical-specific AI tools in practice

The most common tasks currently, for using clinical-specific AI tools are analyzing medical images followed by identifying drug interactions (1/2)

% use a clinical-specific AI tool to help with tasks

1/2	Clinicians n= 1687 - 2024	Doctors n= 1384 - 1654	Nurses n= 303 - 370	
Analyze medical images (X-rays, MRIs, CT etc)	16%	14%	19%	⭐ DR
Identify drug interactions	15%	17%	14%	
Provide a second opinion on a complex case	14%	12%	17%	⭐ ⭐ DR
Provide multiple disciplinary overview for complex cases	12%	12%	13%	
Provide a patient's medication summary	12%	10%	14%	⭐ DR
Write clinical notes	11%	11%	11%	
Write patient letters	10%	9%	12%	

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ⭐⭐
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.
Base: n= 2024

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Clinicians current use of clinical-specific AI tools in practice

The most common tasks currently, for using clinical-specific AI tools are analyzing medical images followed by identifying drug interactions (2/2)

% use a clinical-specific AI tool to help with tasks

	2/2	**Clinicians** n= 1687 - 2024	**Doctors** n= 1384 - 1654	**Nurses** n= 303 - 370
Make clinical decisions		10%	10%	10%
Write pre-authorizations (for payers)		8%	8%	8%

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★

Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.

Base: n= 2024

How clinicians use and wouldn't like to use AI tools in clinical practice
Fewer clinicians in Europe are using (any) AI tools to help with all listed tasks than globally (1/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/Already using AI	Clinicians n= 1687 - 2024	North America n= 203 - 235	South America n= 131 - 156	Europe n= 256 - 398	Asia Pacific n= 968 - 1092	Middle East & Africa n= 117 - 137
Identify drug interactions	11% 30%	14% 29% EU	6% 31% EU	11% 21% ★	11% 33%	12% 36% EU ... EU
Write patient letters	22% 23%	22% 21%	24% 26% EU	28% 18% ★	19% 25%	27% 21% EU
Write clinical notes	23% 22%	26% 21%	20% 17%	29% 18%	19% 24%	26% 24% EU
Provide a second opinion on a complex case	27% 22%	42% 13% ★	20% 17%	37% 11% ★	23% 27%	18% 34% NA SA EU ... NA SA EU
Analyze medical images (X-rays, MRIs, CT etc)	18% 21%	28% 10% ★	13% 10% ★	17% 17% SA NA	18% 27%	16% 13% NA SA EU MA ... NA
Provide multiple disciplinary overview for complex cases	23% 21%	33% 12% ★	17% 14%	24% 14% ★	22% 26%	15% 23% NA SA EU ... NA SA EU
Provide a patient's medication summary	19% 20%	24% 16% EU	12% 15%	22% 10% ★	18% 24%	18% 24% NA SA EU ... NA EU

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 2024

How clinicians use and wouldn't like to use AI tools in clinical practice
Fewer clinicians in Europe are using (any) AI tools to help with all listed tasks than globally (2/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/**Already using AI** 2/2	**Clinicians** n= 1687 - 2024	**North America** n= 203 - 235	**South America** n= 131 - 156	**Europe** n= 256 - 398	**Asia Pacific** n= 968 - 1092	**Middle East & Africa** n= 117 - 137
Write pre-authorizations (for payers)	23%17%	26%16%	20%13% EU	33%8% ★	21%20% ★ EU	16%20% EU
Make clinical decisions	37%16%	49%13%	27%14%	46%11% ★	33%18% NA EU	32%18% EU

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ELSEVIER

How clinicians use clinical-specific AI tools in clinical practice
More clinicians in Asia Pacific use clinical-specific AI tools to help with tasks than globally (1/2)

% use a clinical-specific AI tool to help with tasks

1/2	Clinicians n= 1687 - 2024	North America n= 203 - 235	South America n= 131 - 156	Europe n= 256 - 398	Asia Pacific n= 968 - 1092	Middle East & Africa n= 117 - 137
Analyze medical images (X-rays, MRIs, CT etc)	16%	8% ★	7% ★	14% SA NA	20% ★ NA SA EU	14% SA
Identify drug interactions	15%	19% AP	18%	14%	14%	20%
Provide a second opinion on a complex case	14%	8% ★	12% EU	6% ★	18% ★ NA EU	19% NA EU
Provide multiple disciplinary overview for complex cases	12%	9%	6% ★	8% ★	16% ★ NA SA EU	14% SA EU
Provide a patient's medication summary	12%	10%	6% ★	8% ★	15% ★ SA EU	12%
Write clinical notes	11%	11%	8%	10%	13%	10%
Write patient letters	10%	13%	10%	10%	10%	12%

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.
Base: n= 2024

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How clinicians use clinical-specific AI tools in clinical practice
More clinicians in Asia Pacific use clinical-specific AI tools to help with tasks than globally (2/2)

ELSEVIER

% use a clinical-specific AI tool to help with tasks

2/2	Clinicians n= 1687 - 2024	North America n= 203 - 235	South America n= 131 - 156	Europe n= 256 - 398	Asia Pacific n= 968 - 1092	Middle East & Africa n= 117 - 137
Make clinical decisions	10%	9%	10%	6% ★	12%	EU 10%
Write pre-authorizations (for payers)	8%	9%	6%	4% ★	9%	EU 10% EU

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 2024

How doctors use and would like to use AI tools in clinical practice
Fewer doctors in Europe are using (any) AI tools for tasks than globally (1/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/**Already using AI** 1/2	Doctors n= 1384 - 1654	North America n= 138 - 160	South America n= 107 - 126	Europe n= 214 - 331	Asia Pacific n= 827 - 929	Middle East & Africa n= 86 - 104
Identify drug interactions	8% 29%	8% 25%	8% 37% ★ (NA EU)	9% 22% ★	7% 30% (EU)	10% 32% (EU)
Provide multiple disciplinary overview for complex cases	19% 21%	31% 11% ★	23% 19%	27% 14% ★	13% 26% ★ (NA EU)	12% 22% (NA EU)
Write patient letters	22% 19%	18% 17%	32% 29% ★ (NA EU MA)	26% 14% ★	20% 21%	23% 17% (EU)
Analyze medical images (X-rays, MRIs, CT etc)	15% 19%	24% 12% ★	19% 12% ★	16% 15%	12% 24% ★ (NA SA EU MA)	15% 13%
Write clinical notes	20% 19%	21% 15%	23% 21%	28% 15%	16% 21% (EU)	22% 21%
Provide a second opinion on a complex case	25% 19%	35% 13%	33% 17% (EU)	38% 9% ★	17% 23% ★ (NA EU)	15% 35% ★ (NA SA EU AP)
Provide a patient's medication summary	16% 18%	16% 13%	20% 17% (EU)	21% 9% ★	12% 22% ★ (NA EU)	18% 13% (EU)

By Region

Clinicians | **Doctors** | Nurses

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.
Base: 1654

How doctors use and would like to use AI tools in clinical practice
Fewer doctors in Europe are using (any) AI tools for tasks than globally (2/2)

ELSEVIER

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/**Already using AI** 2/2	Doctors n= 1384 - 1654	North America n= 138 - 160	South America n= 107 - 126	Europe n= 214 - 331	Asia Pacific n= 827 - 929	Middle East & Africa n= 86 - 104
Write pre-authorizations (for payers)	20% 17%	19% 14%	23% 17%	28% 11% ★	17% 21%	AP MA 22% 10%
Make clinical decisions	34% 17%	49% 11%	38% 21% NA EU	46% 9% ★	25% 20%	★ NA EU 35% 13% EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 1654

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Doctors' current use of clinical-specific AI tools in practice

More doctors use clinical-specific AI tools for making clinical decisions in South America than globally (1/2)

ELSEVIER

% use a clinical-specific AI tool to help with tasks

1/2	Doctors n= 1384 - 1654	North America n= 138 - 160	South America n= 107 - 126	Europe n= 214 - 331	Asia Pacific n= 827 - 929	Middle East & Africa n= 86 - 104
Identify drug interactions	17%	17%	22% ⁽ᴱᵁ⁾	13%	17%	15%
Analyze medical images (X-rays, MRIs, CT etc)	14%	10%	6% ★	11%	18% ★ (NA SA EU MA)	7%
Provide multiple disciplinary overview for complex cases	12%	9%	11%	7% ★	15% ★ (EU)	12%
Provide a second opinion on a complex case	12%	8%	10%	4% ★ (EU)	14% ★ (NA EU)	19% ★ (NA SA EU)
Write clinical notes	11%	10%	12%	7% ★	14%	10% (EU)
Provide a patient's medication summary	10%	9%	9%	6% ★	12%	8% (EU)
Make clinical decisions	10%	6%	15% ★ (NA EU)	4% ★	12% (EU)	10% (EU)

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 1654

116

Doctors' current use of clinical-specific AI tools in practice

More doctors use clinical-specific AI tools for making clinical decisions in South America than globally (2/2)

ELSEVIER

% use a clinical-specific AI tool to help with tasks

2/2	Doctors n= 1384 - 1654	North America n= 138 - 160	South America n= 107 - 126	Europe n= 214 - 331	Asia Pacific n= 827 - 929	Middle East & Africa n= 86 - 104
Write patient letters	9%	10%	5%	7%	9%	8%
Write pre-authorizations (for payers)	8%	7%	6%	6%	10%	5%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 1654

How nurses use and wouldn't like to use AI tools in clinical practice

Nearly one third of nurses globally use (any) AI tools to identify drug interactions, while only one in five nurses in Europe do the same (1/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/Already using AI	Nurses n= 303 - 370	North America n= 65 - 78	South America n= 24 - 30	Europe n= 42 - 68	Asia Pacific n= 141 - 163	Middle East & Africa n= 31 - 34
Identify drug interactions	13% 32	19% 34%		13% 20% ★	14% 36%	EU 15% 41% EU
Write patient letters	22% 27	27% 26%		29% 23%	18% 29%	32% 26%
Write clinical notes	25% 25	31% 27%	Too few responses	30% 21%	23% 28%	30% 27%
Provide a second opinion on a complex case	29% 25	49% 12% ★		36% 15%	28% 30%	NA EU 21% 33% NA EU
Analyze medical images (X-rays, MRIs, CT etc)	22% 23	32% 8% ★		18% 20% NA	25% 30%	NA 16% 22% NA
Provide a patient's medication summary	22% 22	31% 19%		22% 11%	24% 26%	EU 19% 31% EU
Provide multiple disciplinary overview for complex cases	27% 20	36% 13%	10% 10%	21% 13%	31% 26%	NA EU 19% 25%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★★

Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 370

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1/2

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How nurses use and wouldn't like to use AI tools in clinical practice

Nearly one third of nurses globally use (any) AI tools to identify drug interactions, while only one in five nurses in Europe do the same (2/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/**Already using AI** 2/2	**Nurses** n= 303 - 370	**North America** n= 65 - 78	**South America** n= 24 - 30	**Europe** n= 42 - 68	**Asia Pacific** n= 141 - 163	**Middle East & Africa** n= 31 - 34
Write pre-authorizations (for payers)	26%17%	32%18% EU	Too few responses	39%5% ★	24%19%	EU 10%29% EU
Make clinical decisions	40%15%	49%14%		47%13%	41%17%	28%19%

By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 370

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Nurses current use of clinical-specific AI tools in practice

Three times as many nurses use clinical-specific AI tools for analyzing medical images globally compared to nurses in North America (1/2)

% use a clinical-specific AI tool to help with tasks

1/2	Nurses n= 303 - 370	North America n= 65 - 78	South America n= 24 - 30	Europe n= 42 - 68	Asia Pacific n= 141 - 163	Middle East & Africa n= 31 - 34
Analyze medical images (X-rays, MRIs, CT etc)	19%	6%	★	17%	23%	NA 22% NA
Provide a second opinion on a complex case	17%	8%		8%	22%	NA EU 18%
Identify drug interactions	14%	22%	AP Too few responses	15%	11%	26% AP
Provide a patient's medication summary	14%	11%		10%	17%	16%
Provide multiple disciplinary overview for complex cases	13%	9%		9%	17%	SA 16% SA
Write patient letters	12%	15%		13%	10%	16%
Write clinical notes	11%	13%		13%	12%	9%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 370

Nurses current use of clinical-specific AI tools in practice

Three times as many nurses use clinical-specific AI tools for analyzing medical images globally compared to nurses in North America (2/2)

% use a clinical-specific AI tool to help with tasks

	2/2	Nurses n= 303 - 370	North America n= 65 - 78	South America n= 24 - 30	Europe n= 42 - 68	Asia Pacific n= 141 - 163	Middle East & Africa n= 31 - 34
Make clinical decisions		10%	12%	Too few responses	9%	11%	9%
Write pre-authorizations (for payers)		8%	10%		3%	8%	16% EU

By Region

Clinicians	Doctors	Nurses

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 370

How clinicians use and wouldn't like to use AI tools in clinical practice

(Any) AI tool use in clinical practice is significantly higher in China for all listed tasks than globally (1/2)

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Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/Already using AI 1/2	Clinicians n= 1687 - 2024		USA n= 189 - 216		China n= 423 - 459		India n= 244 - 274		Japan n= 141 - 160		UK n= 53 - 102		Brazil n= 84 - 104	
Identify drug interactions	11%	30%	15%	29%	JP	3% 46%	US IN JP UK BR ★	19%	25%	JP	15% 12%	★	5% 20%	★	7% 34%	JP UK
Write patient letters	22%	23%	22%	18%	JP	14% 30%	US JP UK ★	26%	25%	JP	17% 10%	★	19% 16%		27% 29%	US JP UK
Write clinical notes	23%	22%	28%	17%	JP	9% 31%	US IN JP UK BR ★	29%	22%	JP	14% 5%	★	22% 18%	JP	22% 21%	JP
Provide a second opinion on a complex case	27%	22%	40%	12%	★	11% 37%	US IN JP UK BR ★	35%	19%	US JP	31% 6%	★	45% 18%	JP	21% 18%	JP
Analyze medical images (X-rays, MRIs, CT etc)	18%	21%	31%	10%	★	12% 37%	US IN JP UK BR ★	28%	21%	US BR	17% 15%		23% 15%		13% 7%	★
Provide multiple disciplinary overview for complex cases	23%	21%	32%	13%	★	17% 36%	US IN JP UK BR ★	29%	14%	★	24% 17%	UK	36% 8%	★	18% 19%	UK
Provide a patient's medication summary	19%	20%	21%	17%	JP	9% 35%	US IN JP UK BR ★	31%	17%	JP	18% 4%	★	20% 12%	JP ★	12% 19%	JP

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 2024

How clinicians use and wouldn't like to use AI tools in clinical practice

(Any) AI tool use in clinical practice is significantly higher in China for all listed tasks than globally (2/2)

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Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/Already using AI (2/2)	Clinicians n= 1687 - 2024	USA n= 189 - 216	China n= 423 - 459	India n= 244 - 274	Japan n= 141 - 160	UK n= 53 - 102	Brazil n= 84 - 104
Write pre-authorizations (for payers)	23% 17%	25% 14% JP	11% 28% US IN JP UK BR ★	31% 16% JP UK	18% 5% ★	49% 4%	★ 21% 14% JP
Make clinical decisions	37% 16%	48% 14% UK	26% 25% US IN JP UK ★	41% 11% ★	28% 10%	53% 6% ★	25% 16% UK

By Key Country

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 2024

Clinicians current use of clinical-specific AI tools in practice

Three times as many clinicians use clinical-specific AI tools to analyze medical images and providing a second opinion on a complex case in China compared to the USA (1/2)

% use a clinical-specific AI tool to help with tasks

1/2	Clinicians n= 2024	USA n= 216	China n= 459	India n= 274	Japan n= 160	UK n= 102	Brazil n= 104
Analyze medical images (X-rays, MRIs, CT etc)	16%	9% ★	30%	US IN JP UK BR ★ 12%	BR 14%	BR 12%	5% ★
Identify drug interactions	15%	20% IN JP	18%	IN JP 13%	JP 2% ★	13%	JP 20% JP
Provide a second opinion on a complex case	14%	9%	30%	US IN JP UK BR ★ 7% ★	4% ★	7% ★	12% JP
Provide multiple disciplinary overview for complex cases	12%	10% IN	26%	US IN JP UK BR ★ 4% ★	9%	IN 5% ★	7%
Provide a patient's medication summary	12%	11%	JP 22%	US IN JP UK BR ★ 9%	JP 3% ★	9% JP	7%
Write clinical notes	11%	11%	JP 15%	JP ★ 12%	JP 2% ★	11%	JP 8% JP
Write patient letters	10%	10%	JP 9%	JP 11%	JP 4% ★	11%	JP 10% JP

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all *clinicians* ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 2024

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Clinicians current use of clinical-specific AI tools in practice

Three times as many clinicians use clinical-specific AI tools to analyze medical images and providing a second opinion on a complex case in China compared to the USA (2/2)

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% use a clinical-specific AI tool to help with tasks

		Clinicians n= 2024	USA n= 216	China n= 459	India n= 274	Japan n= 160	UK n= 102	Brazil n= 104
Make clinical decisions	2/2	10%	10%	UK 18%	★ US IN JP UK 6% ★	6%	2% ★	11% UK
Write pre-authorizations (for payers)		8%	8%	JP 13%	★ IN JP UK BR 7%	2% ★	1%	3%

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 2024

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How doctors use and wouldn't like to use AI tools in clinical practice
Significantly more doctors in China are using (any) AI tools for tasks than globally (1/2)

Use of AI in your clinical setting to help with tasks

%**Wouldn't like to use AI**/**Already using AI** 1/2	Doctors n= 1384 - 1654	USA n= 129 - 145	China n= 368 - 402	India n= 217 - 240	Japan n= 115 - 134	UK n= 36 - 74	Brazil n= 69 - 83
Identify drug interactions	8% 29%	9% 26% ★ IN JP	1% 45% ★ US IN JP UK	14% 16% ★	7% 9% ★	7% 17% ★	9% 39% ★ IN US JP UK
Provide multiple disciplinary overview for complex cases	19% 21%	29% 12% ★	5% 37% ★ US IN JP UK BR	24% 14% ★	11% 17%	38% 9%	25% 23% ★ US UK
Write patient letters	22% 19%	16% 16%	17% 27% ★ US IN JP UK	25% 15%	14% 9% ★	21% 11%	30% 29% ★ IN US JP UK
Analyze medical images (X-rays, MRIs, CT etc)	15% 19%	24% 11% ★	4% 37% ★ US IN JP UK BR	23% 11% ★	7% 12% ★	26% 9% ★	16% 9% ★
Write clinical notes	20% 19%	21% 15% JP	8% 26% ★ US IN JP	24% 16% JP	11% 5% ★	34% 8% ★	24% 21% JP UK
Provide a second opinion on a complex case	25% 19%	34% 13% JP	5% 34% ★ US IN JP UK BR	30% 11% ★	19% 6% ★	49% 6% ★	30% 16% JP UK
Provide a patient's medication summary	16% 18%	15% 13% JP	4% 33% ★ US IN JP UK BR	21% 13% JP	13% 5% ★	19% 6% ★	19% 19% JP UK

By Key Country
Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 1654

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How doctors use and wouldn't like to use AI tools in clinical practice

Significantly more doctors in China are using (any) AI tools for tasks than globally (2/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/Already using AI 2/2	Doctors n= 1384 - 1654	USA n= 129 - 145	China n= 368 - 402	India n= 217 - 240	Japan n= 115 - 134	UK n= 36 - 74	Brazil n= 69 - 83
Write pre-authorizations (for payers)	20% 17%	16% 15%	10% 32% US IN JP UK ★	26% 10% ★	9% 10% ★	31% 3% ★	22% 20% IN JP UK
Make clinical decisions	34% 17%	48% 11% UK	10% 30% US IN JP UK ★	41% 9% UK ★	24% 10% UK ★	54% 1% ★	35% 22% IN US JP UK

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 1654

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Doctors current use of clinical-specific AI tools in practice

More doctors use clinical-specific AI tools for identifying drug interactions in China and Brazil than globally. Among doctors in Japan, usage is lower than globally for most tasks (1/2)

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% use a clinical-specific AI tool to help with tasks

1/2	Doctors n= 1654	USA n= 145	China n= 402	India n= 240	Japan n= 134	UK n= 74	Brazil n= 83
Identify drug interactions	17%	18%	26% (IN JP)	11% ★ (US IN JP UK)	3% ★ (JP)	13% (JP)	26% ★ (IN JP UK)
Analyze medical images (X-rays, MRIs, CT etc)	14%	10%	26%	10% ★ (US IN JP UK BR)	10%	8%	4% ★
Provide multiple disciplinary overview for complex cases	12%	10%	22%	8% ★ (US IN JP UK)	5% ★	7%	14% (JP)
Provide a second opinion on a complex case	12%	9%	23% (JP)	8% ★ (US IN JP UK BR)	2% ★ (JP)	3% ★	10% (JP)
Write clinical notes	11%	10%	17% (JP)	11% ★ (IN JP UK)	4% ★ (JP)	4%	11% (JP)
Provide a patient's medication summary	10%	9%	19% (JP)	7% ★ (US IN JP UK)	2% ★ (JP)	4%	10% (JP)
Make clinical decisions	10%	7%	19%	6% ★ (US IN JP UK)	5%	1% ★	17% ★ (US IN JP UK)

By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 1654

Doctors current use of clinical-specific AI tools in practice

More doctors use clinical-specific AI tools for identifying drug interactions in China and Brazil than globally. Among doctors in Japan, usage is lower than globally for most tasks (2/2)

% use a clinical-specific AI tool to help with tasks

	2/2	Doctors n= 1654	USA n= 145	China n= 402	India n= 240	Japan n= 134	UK n= 74	Brazil n= 83
Write patient letters		9%	10%	12%	JP BR 7%	4%	6%	4%
Write pre-authorizations (for payers)		8%	8%	15%	★ US IN JP UK BR 6%	4%	3%	6%

By Key Country

Clinicians Doctors Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 1654

How nurses use and wouldn't like to use AI tools in clinical practice

Nearly half (47%) of nurses in China use (any) AI tools to identify drug interactions, while one in three nurses in globally do the same (1/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/Already using AI 1/2	Nurses n= 303 - 370	USA n= 60 - 73	China n= 55 - 58	India n= 27 - 35	Japan n= 25 - 29	UK n= 17 - 30	Brazil n= 15 - 21
Identify drug interactions	13% 32%	22% 33%	5% 47%	★ 24% 32%			
Write patient letters	22% 27%	29% 20%	11% 33%	28% 34%			
Write clinical notes	25% 25%	35% 20%	11% 36% US	34% 29%			
Provide a second opinion on a complex case	29% 25%	47% 11% ★	18% 40%	US ★ 39% 27%	US	Too few responses	
Analyze medical images (X-rays, MRIs, CT etc)	22% 23%	38% 9% ★	21% 37%	US ★ 32% 29%	US		
Provide a patient's medication summary	22% 22%	29% 21%	15% 36%	★ 41% 21%			
Provide multiple disciplinary overview for complex cases	27% 20%	35% 15%	29% 34%	US IN ★ 35% 13%			

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 370

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How nurses use and wouldn't like to use AI tools in clinical practice

Nearly half (47%) of nurses in China use (any) AI tools to identify drug interactions, while one in three nurses in globally do the same (2/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/Already using AI 2/2	Nurses n= 303 - 370	USA n= 60 - 73	China n= 55 - 58	India n= 27 - 35	Japan n= 25 - 29	UK n= 17 - 30	Brazil n= 15 - 21
Write pre-authorizations (for payers)	26% 17%	35% 13%	13% 24%		Too few responses		
Make clinical decisions	40% 15%	47% 17%	42% 21%	41% 13%			

By Key Country

Clinicians | Doctors | Nurses

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: 370

Nurses current use of clinical-specific AI tools in practice

Twice as many nurses use clinical-specific AI tools for analyzing medical images and providing multiple disciplinary overviews in China compared to nurses globally (1/2)

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% use a clinical-specific AI tool to help with tasks

	Nurses n= 370	USA n= 73	China n= 58	India n= 35	Japan n= 29	UK n= 30	Brazil n= 21
Analyze medical images (X-rays, MRIs, CT etc)	19%	8% ★	33% ★ US	15%			
Provide a second opinion on a complex case	17%	9%	37% ★ US IN	6%			
Identify drug interactions	14%	22%	11%	15%		Too few responses	
Provide a patient's medication summary	14%	13%	25% ★	12%		13%	
Provide multiple disciplinary overview for complex cases	13%	11%	29% ★ US IN	0% ★			
Write patient letters	12%	11%	7%	16%			
Write clinical notes	11%	11%	13%	14%			

1/2

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 370

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Nurses current use of clinical-specific AI tools in practice

Twice as many nurses use clinical-specific AI tools for analyzing medical images and providing multiple disciplinary overviews in China compared to nurses globally (2/2)

% use a clinical-specific AI tool to help with tasks

2/2	Nurses n= 370	USA n= 73	China n= 58	India n= 35	Japan n= 29	UK n= 30	Brazil n= 21
Make clinical decisions	10%	14%	18%	6%			
Write pre-authorizations (for payers)	8%	8%	11%				

Too few responses

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.
Base: n= 370

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What would increase trust in AI tools

Around two thirds of clinicians (68%) say that automatically citing references, ensuring confidentiality (65%) and training the AI on high-quality peer reviewed content (65%) would increase their trust in clinical-specific AI tools (1/2)

1/2	Clinicians N= 2206	Doctors N= 1781		Nurses N= 425	
Automatically cites references (transparency)	68%	71%	NU ★	64%	★
Ensures confidentiality of input data (security)	65%	66%		64%	
Trained on high-quality peer-reviewed content (quality model input)	65%	70%	NU ★	60%	★
Utilizes the latest resources (recency)	64%	68%	NU ★	61%	★
Trained for factual accuracy, morality, and safety (safety)	63%	67%	NU ★	59%	★
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	61%	68%	NU ★	53%	★
Integrates with electronic health records to incorporate a patient's medical history (personalized)	60%	65%	★ NU	56%	★

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?
Base: n= 2206

What would increase trust in AI tools

Around two thirds of clinicians (68%) say that automatically citing references, ensuring confidentiality (65%) and training the AI on high-quality peer reviewed content (65%) would increase their trust in clinical-specific AI tools (2/2)

	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425	
Clear accountability for provided information (responsibility)	59%	61%	57%	
Guidance is provided for using outputs in a clinical setting (training)	57%	59%	56%	
Abides by laws governing development and implementation (legality)	57%	62% ^{NU} ★	52%	★
Delivers coherent clinical outputs in complex situations (quality model output)	56%	62% ^{NU} ★	50%	★
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	56%	58%	54%	
Other (please specify)	4%	3%	4%	
Don't know / Not applicable	3%	3%	4%	

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?
Base: n= 2206

What would increase trust in AI tools

Automatically citing references is identified as the leading factor for increasing trust in a clinical-specific AI tool, particularly among clinicians in South America (1/2)

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1/2	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Automatically cites references (transparency)	68%	73% EU AP	81% ★ EU AP MA	63%	66%	65%
Ensures confidentiality of input data (security)	65%	66%	70%	65%	64%	69%
Trained on high-quality peer-reviewed content (quality model input)	65%	74% ★ SA EU AP MA	58%	61%	66%	61% SA EU
Utilizes the latest resources (recency)	64%	68% EU	70% EU	53% ★	67%	64% EU / EU
Trained for factual accuracy, morality, and safety (safety)	63%	75% ★ SA EU AP MA	60%	59%	64%	54% ★ MA
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	61%	68% ★ AP MA	71% ★ AP MA	64%	56% ★ AP	56%
Integrates with electronic health records to incorporate a patient's medical history (personalized)	60%	59%	67%	57% EU	61%	58%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all *clinicians* ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 2206

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What would increase trust in AI tools

Automatically citing references is identified as the leading factor for increasing trust in a clinical-specific AI tool, particularly among clinicians in South America (2/2)

2/2	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Clear accountability for provided information (responsibility)	59%	65%	60% (AP)	59%	57%	60%
Guidance is provided for using outputs in a clinical setting (training)	57%	60% (EU)	55%	49% ★	61% (EU)	60% (EU)
Abides by laws governing development and implementation (legality)	57%	63% (EU)	65% ★ (EU AP)	49% ★	57% (EU)	59% (EU)
Delivers coherent clinical outputs in complex situations (quality model output)	56%	57%	67% ★ (NA EU AP MA)	51%	57%	54%
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	56%	61% (EU)	58%	49% ★	58% (EU)	54%
Other (please specify)	4%	6%	6% (EU)	1% ★ (EU)	3%	6% (EU) (EU)
Don't know / Not applicable	3%	5%	0% ★ (SA)	4%	3% (SA)	5% (SA)

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 2206

137

What would increase trust in AI tools

Around four in five doctors in North America say training the AI on high-quality peer reviewed content (80%) and training for factual accuracy (78%) would increase their trust (higher than average) (1/2)

1/2

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109	
Automatically cites references (transparency)	71%	77% (EU MA)	84% ★ (EU AP MA)	68%	71%	65%	
Trained on high-quality peer-reviewed content (quality model input)	70%	80% ★ (SA EU AP MA)	66%	68%	71%	66%	
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	68%	74%	66%	68%	69%	59% (MA)	★
Utilizes the latest resources (recency)	68%	69%	69%	61% ★	70%	68% (EU)	
Trained for factual accuracy, morality, and safety (safety)	67%	78% ★ (SA EU AP MA)	60%	64%	68%	55% (SA MA)	★
Ensures confidentiality of input data (security)	66%	66%	69%	63%	68%	61%	
Integrates with electronic health records to incorporate a patient's medical history (personalized)	65%	61%	65%	64%	66%	63%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 1781

138

What would increase trust in AI tools - doctors by region

Around four in five doctors in North America say training the AI on high-quality peer reviewed content (80%) and training for factual accuracy (78%) would increase their trust (higher than average) (2/2)

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2/2	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Delivers coherent clinical outputs in complex situations (quality model output)	62%	63%	65%	59%	64%	56%
Abides by laws governing development and implementation (legality)	62%	64%	66%	56%	63%	55% (EU)
Clear accountability for provided information (responsibility)	61%	68% (AP MA)	60%	61%	60%	53%
Guidance is provided for using outputs in a clinical setting (training)	59%	60%	53%	55%	61%	54%
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	58%	63%	60%	55%	58%	53%
Other (please specify)	3%	5%	6% (EU)	1% (EU)	3%	4%
Don't know / Not applicable	3%	3%	1%	3%	3%	6% (SA)

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

★ ★

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?
Base: n= 1781

139

What would increase trust in AI tools - nurses by region

Six in ten (61%) nurses globally indicate that AI's utilization of latest resources would increase their trust in a clinical-specific AI tool, whereas around half of nurses in Europe (46%) say the same (1/2)

ELSEVIER

Back to home

1/2	Nurses n= 425	North America n= 92		South America n= 32		Europe n= 81		Asia Pacific n= 180		Middle East & Africa n= 38	
Ensures confidentiality of input data (security)	64%	66%		72%		67%		60%		76%	
Automatically cites references (transparency)	64%	70%		78%		58%		62%		66%	
Utilizes the latest resources (recency)	61%	67%	EU	71%	EU	46%	★	65%	EU	61%	
Trained on high-quality peer-reviewed content (quality model input)	60%	69%		50%		55%		62%		55%	
Trained for factual accuracy, morality, and safety (safety)	59%	72%	★ EU AP MA	60%		55%		59%		53%	
Clear accountability for provided information (responsibility)	57%	61%		59%		57%		54%		66%	
Guidance is provided for using outputs in a clinical setting (training)	56%	61%	EU	57%		43%	★	60%	EU	66%	EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?
Base: n= 425

140

What would increase trust in AI tools

Six in ten (61%) nurses globally indicate that AI's utilization of latest resources would increase their trust in a clinical-specific AI tool, whereas around half of nurses in Europe (46%) say the same (2/2)

2/2	Nurses n= 425	North America n= 92		South America n= 32		Europe n= 81		Asia Pacific n= 180		Middle East & Africa n= 38	
Integrates with electronic health records to incorporate a patient's medical history (personalized)	56%	56%		69%		51%		57%		53%	
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	54%	59%	EU	56%		43%		57%	EU	55%	
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	53%	62%	AP	75% ★	AP	61%	AP	44% ★		53%	
Abides by laws governing development and implementation (legality)	52%	62%	EU	65%	EU	42%		51%		63%	EU
Delivers coherent clinical outputs in complex situations (quality model output)	50%	51%		69% ★	EU AP	43%		49%		53%	
Don't know / Not applicable	4%	6%		0%		6%		3%		5%	
Other (please specify)	4%	6%		6%		1%		4%		3%	

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 425

What would increase trust in AI tools

Four in five clinicians in the UK list ensuring confidentiality (81%) and training AI for factual accuracy (also 81%) as the most important factors for increasing trust (higher than average) (1/2)

1/2

	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Automatically cites references (transparency)	68%	72%	IN JP 73% ★	IN JP 59% ★	58% ★	64%	84% CH US IN JP UK ★
Ensures confidentiality of input data (security)	65%	64%	64%	60%	62%	81% US CH IN JP ★	75% CH US IN JP ★
Trained on high-quality peer-reviewed content (quality model input)	65%	72% ★	IN JP BR 71% ★	IN JP BR 63%	JP 48% ★	77% IN JP BR ★	58%
Utilizes the latest resources (recency)	64%	68%	70% ★	JP 69%	60%	72% JP	74% JP ★
Trained for factual accuracy, morality, and safety (safety)	63%	75% CH IN JP BR ★	67%	JP 62%	JP 53% ★	81% CH IN JP BR ★	62%
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	61%	67% CH IN JP	58%	52% ★	53%	80% US CH IN JP ★	76% CH IN JP ★
Integrates with electronic health records to incorporate a patient's medical history (personalized)	60%	59%	66% IN JP ★	58%	51% ★	74% US IN JP ★	68% JP

By Key Country

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 2206

142

What would increase trust in AI tools

Four in five clinicians in the UK list ensuring confidentiality (81%) and training AI for factual accuracy (also 81%) as the most important factors for increasing trust (higher than average) (2/2)

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2/2

	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Clear accountability for provided information (responsibility)	59%	63%	58% (JP)	57%	52%	76% (US CH IN JP)	65% (JP)
Guidance is provided for using outputs in a clinical setting (training)	57%	58%	65% (US IN JP BR)	57%	48%	68% (JP BR)	53%
Abides by laws governing development and implementation (legality)	57%	64%	64% (IN JP)	49%	46%	67% (IN JP)	75% (CH IN JP)
Delivers coherent clinical outputs in complex situations (quality model output)	56%	57%	64% (JP)	49% (IN JP)	47%	65% (IN JP)	68% (IN JP)
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	56%	61%	62% (JP)	54% (IN JP)	40% (JP)	61% (JP)	63% (JP)
Other (please specify)	4%	6%	1% (CH JP)	9%	0% (CH JP UK)	2%	7% (CH JP)
Don't know / Not applicable	3%	5%	0% (CH UK BR)	3%	6% (CH)	0% (CH UK BR)	0%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 2206

143

What would increase trust in AI tools

Doctors in China seem more ready to trust clinical-specific AI tools than globally, as they are significantly more likely to say all the listed approaches would increase their trust (1/2)

1/2	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Automatically cites references (transparency)	71%	78%	77% ★ (IN JP UK)	65% ★	64%	64%	86% ★ (IN JP UK)
Trained on high-quality peer-reviewed content (quality model input)	70%	80% ★ (IN JP BR)	78% ★ (IN JP BR)	66% (JP)	50% ★	76% (JP)	64% (JP)
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	68%	74% (IN JP)	74% ★ (IN JP)	64%	61%	76% (JP)	74% (JP)
Utilizes the latest resources (recency)	68%	68% (JP)	77% ★ (US IN JP)	66% (JP)	54% ★	67%	69% (JP)
Trained for factual accuracy, morality, and safety (safety)	67%	79% ★ (IN JP BR)	75% ★ (IN JP)	64%	57% ★	85% ★ (IN JP BR)	67%
Ensures confidentiality of input data (security)	66%	67% (JP)	74% ★ (IN JP)	64%	54% ★	74% (JP)	76% (IN JP)
Integrates with electronic health records to incorporate a patient's medical history (personalized)	65%	63% (JP)	75% ★ (US IN JP)	65% (JP)	42% ★	74% (JP)	67% (JP)

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?
Base: n= 1781

144

What would increase trust in AI tools

Doctors in China seem more ready to trust clinical-specific AI tools than globally, as they are significantly more likely to say all the listed approaches would increase their trust (2/2)

2/2	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Delivers coherent clinical outputs in complex situations (quality model output)	62%	61%	JP 74% ★	US IN JP UK 55% ★	48% ★	62%	IN JP 71%
Abides by laws governing development and implementation (legality)	62%	66%	JP 72% ★	IN JP 59%	50% ★	77% ★ IN JP	IN JP 75% ★
Clear accountability for provided information (responsibility)	61%	68%	JP 63%	JP 60%	52% ★	78% ★ CH IN JP	JP 69%
Guidance is provided for using outputs in a clinical setting (training)	59%	60%	63%	JP 60%	53%	64%	54%
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	58%	64%	JP 63%	JP 57%	JP 43% ★	62%	JP 61%	JP
Other (please specify)	3%	4%	2%	6% ★	CH JP 1%	4%	JP 6%
Don't know / Not applicable	3%	3%	CH 0% ★	4%	CH 7% ★	CH UK BR 0%	0%

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all *doctors* ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 1781

145

What would increase trust in AI tools

Around two thirds of nurses globally (64%) list ensuring confidentiality as a leading factor for increasing trust, a sentiment particularly shared in the UK (higher than average at 87%) (1/2)

1/2	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Ensures confidentiality of input data (security)	64%	61%	55%	57%	70%	87% ★ US CH IN	
Automatically cites references (transparency)	64%	66%	68%	54%	52%	65%	
Utilizes the latest resources (recency)	61%	68%	63%	71%	67%	77%	Too few responses
Trained on high-quality peer-reviewed content (quality model input)	60%	64%	65%	60%	45%	77% JP	
Trained for factual accuracy, morality, and safety (safety)	59%	71% ★ JP	60%	60%	48%	77% ★ JP	
Clear accountability for provided information (responsibility)	57%	59%	53%	54%	52%	74%	
Guidance is provided for using outputs in a clinical setting (training)	56%	55%	67%	JP 54%	42%	71% JP	

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?
Base: n= 425

146

What would increase trust in AI tools

Around two thirds of nurses globally (64%) list ensuring confidentiality as a leading factor for increasing trust, a sentiment particularly shared in the UK (higher than average at 87%) (2/2)

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	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
2/2							
Integrates with electronic health records to incorporate a patient's medical history (personalized)	56%	55%	57%	51%	61%	74% ★	
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	54%	59%	JP 62%	JP 51%	36%	61%	JP
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	53%	60%	CH IN 42%	40%	45%	84% US CH IN JP ★	Too few responses
Abides by laws governing development and implementation (legality)	52%	62%	IN 55%	40%	42%	58%	
Delivers coherent clinical outputs in complex situations (quality model output)	50%	53%	53%	43%	45%	68%	IN
Don't know / Not applicable	4%	7%	CH 0%	3%	6%	0%	
Other (please specify)	4%	7%	CH 0%	11%	CH JP ★	0%	

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 425

147

The future of healthcare

How healthcare will change in the next 2-3 years

Over half of clinicians believe that, in the next 2-3 years, AI will be used to analyze all medical images to identify abnormalities (56%), health costs will be higher in real terms (53%), hospital stays will be shorter (51%), and universal healthcare will be available (51%) (1/2)

%Disagree/Agree	Clinicians n= 2091 - 2120	Doctors n= 1687 - 1710	Nurses n= 402 - 412
AI will analyze all medical images to identify abnormalities	23% 56%	24% 59%	22% 54%
Healthcare costs are higher (in real terms)	30% 53%	21% 59% ★ NU	38% 47% ★ NU
Hospital stays are shorter	24% 51%	21% 51%	28% 51%
Everyone will be able to easily access healthcare (universal healthcare)	30% 51%	35% 43% ★	26% 59% ★
Healthcare will be more equitable	26% 50%	30% 39% ★	22% 62% ★
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	27% 41%	25% 47% ★ NU	29% 36% ★ NU
Hospitalization rates are lower	37% 41%	41% 32% ★	33% 50% ★

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2091 - 2120

How healthcare will change in the next 2-3 years

Over half of clinicians believe that, in the next 2-3 years, AI will be used to analyze all medical images to identify abnormalities (56%), health costs will be higher in real terms (53%), hospital stays will be shorter (51%), and universal healthcare will be available (51%) (2/2)

%Disagree/Agree	2/2	Clinicians n= 2091 - 2120	Doctors n= 1687 - 1710		Nurses n= 402 - 412	
Most patients will self-diagnose with AI tools available online rather than see a clinician		39% 38%	42% 38%		35% 39%	
Clinicians have less choice of which procedures and therapies a patient receives		44% 32%	38% 35%	NU	49% 30	NU
Most healthcare will be delivered in the patient's home		40% 31%	50% 28	★	29% 34	

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: n= 2120

How healthcare will change in the next 2-3 years

Clinicians in North America tend to have more negative views on the future of healthcare than globally, with twice as many as global disagreeing that universal healthcare will be available and healthcare will be more equitable. Three in four clinicians in North America (74%) also agree that healthcare costs will increase (higher than average, 53%) (1/2)

%Disagree/Agree 1/2	Clinicians n= 2091 - 2120	North America n= 253 - 260	South America n= 152 - 161	Europe n= 411 - 421	Asia Pacific n= 1111 - 1130	Middle East & Africa n= 136 - 142
AI will analyze all medical images to identify abnormalities	23% 56%	23% 55%	30% 56%	19% 62% ★ AP	22% 54%	27% 57%
Healthcare costs are higher (in real terms)	30% 53%	9% 74% ★ SA EU AP	26% 57% AP	18% 63% ★ AP	41% 42% ★	18% 68% ★ SA AP
Hospital stays are shorter	24% 51%	27% 50%	31% 52%	21% 52%	24% 51%	24% 55%
Everyone will be able to easily access healthcare (universal healthcare)	30% 51%	66% ★	41% 47% NA	31% 47% NA	21% 61% ★ NA SA EU	28% 57% NA EU
Healthcare will be more equitable	26% 50%	53% 2? ★	36% 46% NA EU	32% 36% ★ NA	16% 62% ★ NA SA EU	23% 62% ★ NA SA EU
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	27% 41%	28% 39%	30% 47%	24% 43%	28% 39%	22% 53% ★ NA EU AP
Hospitalization rates are lower	37% 41%	56% 22 ★	51% 31% ★ NA	39% 35% ★ NA	30% 48% ★ NA SA EU	33% 48% NA SA EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2120

How healthcare will change in the next 2-3 years

Clinicians in North America tend to have more negative views on the future of healthcare than globally, with twice as many as global disagreeing that universal healthcare will be available and healthcare will be more equitable. Three in four clinicians in North America (74%) also agree that healthcare costs will increase (higher than average, 53%) (2/2)

%**Disagree**/**Agree** 2/2	**Clinicians** n= 2091 - 2120	**North America** n= 253 - 260	**South America** n= 152 - 161	**Europe** n= 411 - 421	**Asia Pacific** n= 1111 - 1130	**Middle East & Africa** n= 136 - 142
Most patients will self-diagnose with AI tools available online rather than see a clinician	39% 38%	29% 50% ★ EU AP	40% 48% ★ EU AP	45% 34%	38% 35%	41% 43%
Clinicians have less choice of which procedures and therapies a patient receives	44% 32%	21% 54% ★ SA EU AP	42% 36%	44% 28% AP	50% 27%	33% 47% ★ EU AP
Most healthcare will be delivered in the patient's home	40% 31%	51% 22 ★	52% 32% NA	40% 33% NA	35% 31% NA	39% 40% ★ NA AP

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2120

How healthcare will change in the next 2-3 years

More doctors in North America (74%) and Europe (71%) than globally (59%) believe healthcare costs will be higher (1/2)

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%Disagree/Agree	Doctors n= 1687 - 1710	North America n= 167 - 173	South America n= 122 - 130	Europe n= 335 - 341	Asia Pacific n= 943 - 957	Middle East & Africa n= 99 - 104
Healthcare costs are higher (in real terms)	21% 59%	9% 74% ★ AP MA	21% 65%	12% 71% ★ AP MA	27% 49%	★ 27% 60%
AI will analyze all medical images to identify abnormalities	24% 59%	22% 56%	31% 52%	25% 62%	22% 60%	29% 55%
Hospital stays are shorter	21% 51%	27% 48%	31% 46%	20% 54%	18% 53%	18% 49%
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	25% 47%	26% 40%	37% 37% ★	26% 45%	22% 51%	NA SA 28% 51% SA
Everyone will be able to easily access healthcare (universal healthcare)	35% 43%	71% 13% ★	49% 37%	31% 43% NA	26% 49% NA	★ NA SA 30% 55% ★ NA SA EU
Healthcare will be more equitable	30% 39%	54% 1 ★	43% 35%	30% 31 NA	24% 46% ★ NA	★ NA SA EU 25% 55% ★ NA SA EU
Most patients will self-diagnose with AI tools available online rather than see a clinician	42% 38%	32% 43%	49% 38%	45% 37%	41% 37%	50% 37%

1/2

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1710

153

How healthcare will change in the next 2-3 years

More doctors in North America (74%) and Europe (71%) than globally (59%) believe healthcare costs will be higher (2/2)

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Back to home

%Disagree/Agree 2/2	Doctors n= 1687 - 1710	North America n= 167 - 173		South America n= 122 - 130	Europe n= 335 - 341	Asia Pacific n= 943 - 957	Middle East & Africa n= 99 - 104	
Clinicians have less choice of which procedures and therapies a patient receives	38% 35%	20% 56%	★ SA EU AP MA	44% 37%	39% 31%	41% 32%	36% 36%	
Hospitalization rates are lower	41% 32%	55% 19%	★	45% 28%	41% 32%	NA 38% 33%	NA 35% 48%	★ NA SA EU AP
Most healthcare will be delivered in the patient's home	50% 28%	59% 16%	★	55% 27% NA	51% 27%	NA 48% 30%	NA 46% 36%	NA

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1710

154

How healthcare will change in the next 2-3 years

Around three in four nurses in China believe healthcare will be more equitable (78%) and universal healthcare will be available (72%), whereas only one in four (23-25%) believe the same in North America (1/2)

%Disagree/Agree	Nurses n= 402 - 412	North America n= 84 - 89	South America n= 29 - 31	Europe n= 75 - 80	Asia Pacific n= 168 - 175	Middle East & Africa n= 36 - 38
Healthcare will be more equitable	22% 62%	51% 25% ★	29% 58% NA	34% 41% ★ NA	9% 78% ★ NA SA EU	21% 68% NA EU
Everyone will be able to easily access healthcare (universal healthcare)	26% 59%	60% 23% ★	33% 57% NA	31% 50% NA	15% 72% ★ NA EU	26% 58% NA
AI will analyze all medical images to identify abnormalities	22% 54%	25% 53%	30% 60%	14% 62% AP	22% 49%	24% 59%
Hospital stays are shorter	28% 51%	28% 51%		23% 50%	30% 50%	29% 61%
Hospitalization rates are lower	33% 50%	58% 24% ★	56% 34%	38% 38%	23% 63% ★ NA SA EU	32% 47% NA
Healthcare costs are higher (in real terms)	38% 47%	9% 74% ★ EU AP		25% 56% AP	55% 34% ★	11% 76% ★ EU AP
Most patients will self-diagnose with AI tools available online rather than see a clinician	35% 39%	26% 58% ★ EU AP	30% 59% ★ EU AP	44% 31%	34% 34%	32% 49%

1/2

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all *nurses* ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 412

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How healthcare will change in the next 2-3 years

Around three in four nurses in China believe healthcare will be more equitable (78%) and universal healthcare will be available (72%), whereas only one in four (23-25%) believe the same in North America (2/2)

%Disagree/Agree 2/2	Nurses n= 402 - 412	North America n= 84 - 89	South America n= 29 - 31	Europe n= 75 - 80	Asia Pacific n= 168 - 175	Middle East & Africa n= 36 - 38
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	29% 36%	29% 38%	22% 58% ★ NA AP	22% 41% AP	35% 28%	17% 56% ★ AP
Most healthcare will be delivered in the patient's home	29% 34%	44% 27%	Too few responses	30% 39%	22% 31%	32% 45%
Clinicians have less choice of which procedures and therapies a patient receives	49% 30%	21% 53% ★ EU AP		49% 26%	58% 22%	30% 57% ★ EU AP

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses
★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 412

How healthcare will change in the next 2-3 years

One in five clinicians (21%) in China believe healthcare costs will increase, whereas over three in four (76%) clinicians in the USA believe the same (1/2)

ELSEVIER

%Disagree/Agree 1/2	Clinicians n= 2091 - 2120	USA n= 234 - 240	China n= 465 - 479	India n= 268 - 280	Japan n= 159 - 165	UK n= 104 - 106	Brazil n= 100 - 106
AI will analyze all medical images to identify abnormalities	23% 56%	25% 54%	21% 52%	26% 56%	19% 51%	24% 56%	31% 58%
Healthcare costs are higher (in real terms)	30% 53%	9% 76% CH IN JP UK BR ★	57% 21% ★	25% 61% CH JP ★	45% 47% CH	20% 65% CH JP ★	27% 59% CH
Hospital stays are shorter	24% 51%	30% 48%	19% 54% JP UK	30% 50% UK	30% 45%	33% 38% ★	37% 49%
Everyone will be able to easily access healthcare (universal healthcare)	30% 51%	69% 15% ★	15% 63% US JP UK BR ★	23% 66% US JP UK BR ★	29% 50% US	28% 45% US	46% 41% US ★
Healthcare will be more equitable	26% 50%	56% 19% ★	9% 68% US JP UK BR ★	18% 68% US JP UK BR ★	21% 46% US	27% 43% US	41% 44% US
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	27% 41%	28% 39%	26% 38%	36% 41% UK	21% 38%	28% 29% ★	33% 46% UK
Hospitalization rates are lower	37% 41%	57% 20% ★	21% 57% US IN UK BR ★	36% 43% US UK BR	32% 51% US UK BR ★	42% 29% ★	60% 26% US ★

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *clinicians* ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2120

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How healthcare will change in the next 2-3 years

One in five clinicians (21%) in China believe healthcare costs will increase, whereas over three in four (76%) clinicians in the USA believe the same (2/2)

ELSEVIER

%Disagree/Agree	Clinicians 2/2 n= 2091 - 2120	USA n= 234 - 240	China n= 465 - 479	India n= 268 - 280	Japan n= 159 - 165	UK n= 104 - 106	Brazil n= 100 - 106
Most patients will self-diagnose with AI tools available online rather than see a clinician	39% 38%	28% 51% ★ (CH JP UK)	44% 22% ★	31% 52% ★ (CH JP UK)	36% 35% (CH)	39% 35% (CH)	38% 54% ★ (CH JP UK)
Clinicians have less choice of which procedures and therapies a patient receives	44% 32%	21% 57% ★ (CH IN JP UK BR)	54% 18% ★	44% 38% (CH JP UK)	58% 17% ★	46% 27% (CH)	49% 31% (CH JP)
Most healthcare will be delivered in the patient's home	40% 31%	53% 24% ★	27% 27%	40% 36% (CH US JP UK)	50% 22% ★	47% 25%	58% 28%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 2120

How healthcare will change in the next 2-3 years

More doctors in the USA, UK and India than average believe healthcare costs will increase. Doctors in China are particularly positive about the future of healthcare compared to clinicians globally (1/2)

ELSEVIER

Back to home

%Disagree/Agree 1/2	Doctors n= 1687 - 1710	USA n= 152 - 157	China n= 406 - 419	India n= 236 - 247	Japan n= 128 - 133	UK n= 73 - 77	Brazil n= 78 - 84
Healthcare costs are higher (in real terms)	21% 59%	9% 75% ★ (CH JP)	38% 29% ★	14% 72% ★ (CH)	20% 64% (CH)	7% 83% ★ (CH JP BR)	23% 63% (CH)
AI will analyze all medical images to identify abnormalities	24% 59%	21% 58%	15% 63% (IN BR)	32% 53%	26% 57%	26% 59%	30% 52%
Hospital stays are shorter	21% 51%	27% 46%	9% 59% ★ (US JP UK BR)	24% 52% (JP)	31% 39% ★	26% 40% ★	38% 43%
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	25% 47%	25% 41%	15% 58% ★ (US IN UK BR)	35% 39% ★	16% 54% (US IN UK BR)	29% 32% ★	40% 35% ★
Everyone will be able to easily access healthcare (universal healthcare)	35% 43%	75% 10% ★	21% 51% ★ (US JP BR)	29% 52% ★ (US JP BR)	38% 32% ★ (US)	22% 39% (US)	57% 29% ★ (US)
Healthcare will be more equitable	30% 39%	57% 16% ★	15% 50% ★ (US JP UK BR)	29% 49% ★ (US JP UK BR)	33% 30% (US)	31% 28% (US)	48% 31% (US)
Most patients will self-diagnose with AI tools available online rather than see a clinician	42% 38%	33% 42% (CH)	46% 27% ★	32% 52% ★ (CH UK BR)	41% 43% (CH UK BR)	45% 31% (CH)	50% 38%

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all *doctors*   ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1710

How healthcare will change in the next 2-3 years

More doctors in the USA, UK and India than average believe healthcare costs will increase. Doctors in China are particularly positive about the future of healthcare compared to clinicians globally (2/2)

ELSEVIER

%Disagree/Agree 2/2	Doctors n= 1687 - 1710	USA n= 152 - 157	China n= 406 - 419	India n= 236 - 247	Japan n= 128 - 133	UK n= 73 - 77	Brazil n= 78 - 84
Clinicians have less choice of which procedures and therapies a patient receives	38% 35%	20% 55% CH IN JP UK BR	39% 28%	★ 40% 41% CH JP	47% 26%	★ 34% 32%	49% 34%
Hospitalization rates are lower	41% 32%	55% 19% ★	26% 40% US IN JP UK BR	48% 29% US	48% 23% ★	45% 18% ★	51% 24%
Most healthcare will be delivered in the patient's home	50% 28%	61% 16% ★	41% 32% US JP UK	54% 30% US JP UK	68% 17% ★	61% 17% ★	62% 25%

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 1710

How healthcare will change in the next 2-3 years

Over three quarters of nurses (75-88%) in China and India agree healthcare will be more equitable, and universal healthcare will be available- a view shared by less than a quarter of nurses in the USA (20-23%) (1/2)

ELSEVIER

%Disagree/Agree 1/2	Nurses n= 402 - 412	USA n= 79 - 84	China n= 58 - 60	India n= 31 - 35	Japan n= 31 - 33	UK n= 29 - 31	Brazil n= 22 - 23
Healthcare will be more equitable	22% 62%	56% 23% ★	3% 86% ★ (US JP UK)	6% 88% ★ (US UK)	9% 63% (US)	23% 58% (US)	
Everyone will be able to easily access healthcare (universal healthcare)	26% 59%	63% 20% ★	8% 75% ★ (US)	17% 80% ★ (US)	19% 68% (US)		
AI will analyze all medical images to identify abnormalities	22% 54%	28% 49%	27% 40% ★	20% 60%	13% 45%	23% 53%	Too few responses
Hospital stays are shorter	28% 51%	32% 50%	29% 50%	35% 48%	28% 50%	39% 35%	
Hospitalization rates are lower	33% 50%	58% 22% ★	15% 73% ★ (US UK)	24% 58% (US)	16% 78% ★ (US UK)	40% 40%	
Healthcare costs are higher (in real terms)	38% 47%	10% 77% ★ (CH IN JP UK)	75% 14% ★	35% 50% (CH)	71% 29%	33% 47% (CH)	
Most patients will self-diagnose with AI tools available online rather than see a clinician	35% 39%	24% 60% ★ (CH JP UK)	42% 17% ★	29% 53% (CH JP)	31% 28%	32% 39% (CH)	

By Key Country

Clinicians | Doctors | **Nurses**

★ ★ Significantly higher/ lower than all nurses
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 412

How healthcare will change in the next 2-3 years

Over three quarters of nurses (75-88%) in China and India agree healthcare will be more equitable, and universal healthcare will be available- a view shared by less than a quarter of nurses in the USA (20-23%) (2/2)

ELSEVIER

Back to home

%Disagree/Agree	Nurses 2/2 n= 402 - 412	USA n= 79 - 84	China n= 58 - 60	India n= 31 - 35	Japan n= 31 - 33	UK n= 29 - 31	Brazil n= 22 - 23
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	29% 36%	30% 37% CH	38% 17% ★	38% 44% CH	25% 22%	27% 27%	
Most healthcare will be delivered in the patient's home	29% 34%	44% 32%	14% 22%	26% 41%	33% 27%	32% 32%	
Clinicians have less choice of which procedures and therapies a patient receives	49% 30%	21% 58% CH IN JP ★	69% 8% ★	48% 35% CH JP	69% 9% ★		

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 412

What will be the impact of AI tools in the next 2-3 years

Clinicians believe clinical AI tools will save them time (70%), speed up diagnosis (58%), enable more accurate diagnosis (54%) and improve patient outcomes (55%)

I believe clinical AI tools will…

	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425
…save me time	70%	71%	70%
…allow me to make a diagnosis more quickly	58%	58%	57%
…help improve patient outcomes	55%	54%	56%
…enable me to more accurately diagnose patients	54%	57%	52%
…increase the quality of patient consultations	50%	51%	48%
…mean most of my patients receive personalised treatment plans generated by AI	40%	38%	41%
None of the above	6%	7%	5%
Don't know	6%	5%	7%

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 2206

ELSEVIER

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What will be the impact of AI tools in the next 2-3 years

Fewer clinicians in North America and Europe than globally see future positive impacts of clinical AI tools

I believe clinical AI tools will…

I believe clinical AI tools will…	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
…save me time	70%	60% ★	72% [NA EU]	63% ★	74% ★ [NA EU]	76% [NA EU]
…allow me to make a diagnosis more quickly	58%	43% ★	65% [NA EU]	44% ★	65% ★ [NA EU]	63% [NA EU]
…help improve patient outcomes	55%	45% ★	62% [NA EU]	50% ★	57% [NA EU]	69% ★ [NA EU] [EU AP]
…enable me to more accurately diagnose patients	54%	45% ★	63% ★ [NA EU]	47% ★	57% [NA EU]	60% [NA EU]
…increase the quality of patient consultations	50%	36% ★	51% [NA EU]	38% ★	56% ★ [NA EU]	59% ★ [NA EU]
…mean most of my patients receive personalised treatment plans generated by AI	40%	28% ★	42% [NA EU]	29% ★	46% ★ [NA EU]	46% [NA EU]
None of the above	6%	13% ★ [SA AP MA]	5%	10% ★ [SA AP MA]	4% ★	4%
Don't know	6%	15% ★ [SA EU AP MA]	4%	6%	4% ★	6%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all *clinicians* ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n=2206

ELSEVIER

What will be the impact of AI tools in the next 2-3 years

More doctors in Asia Pacific think AI tools will positively impact them compared to doctors in North America and Europe

I believe clinical AI tools will…

	Doctors n= 1781	North America n= 176		South America n= 132		Europe n= 358		Asia Pacific n= 990		Middle East & Africa n= 109	
…save me time	71%	64%		73%	EU	60%	★	76%	★ NA EU	73%	EU
…allow me to make a diagnosis more quickly	58%	44%	★	56%	NA	48%	★	65%	★ NA SA EU	60%	NA EU
…enable me to more accurately diagnose patients	57%	49%		58%	EU	47%	★	63%	★ NA EU	54%	
…help improve patient outcomes	54%	40%	★	56%		47%	NA	58%	★ NA EU	65%	★ NA EU
…increase the quality of patient consultations	51%	36%	★	42%	★	39%	★	60%	★ NA SA EU	60%	NA SA EU
…mean most of my patients receive personalised treatment plans generated by AI	38%	23%	★	32%		26%	★	47%	★ NA SA EU	42%	NA EU
None of the above	7%	13%	★ AP MA	7%		13%	★ AP MA	4%	★	3%	
Don't know	5%	9%	★ AP	5%		5%		4%		5%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 1781

ELSEVIER

What will be the impact of AI tools in the next 2-3 years

Less than two in four nurses in Europe (39%) believe AI will allow them to make a diagnosis more quickly (lower than average)

I believe clinical AI tools will…

	Nurses n= 425	North America n= 92		South America n= 32		Europe n= 81		Asia Pacific n= 180	Middle East & Africa n= 38	
…save me time	70%	55%	★	71%		66%		73%	NA 79% NA	
…allow me to make a diagnosis more quickly	57%	42%	★	75%	NA EU ★	39%	★	64%	NA EU 66% NA EU	
…help improve patient outcomes	56%	50%		68%		52%		56%	74%	NA EU AP ★
…enable me to more accurately diagnose patients	52%	40%	★	68%	NA EU	48%		51%	66%	NA
…increase the quality of patient consultations	48%	36%	★	60%	NA EU	38%		52%	NA EU 58% NA EU	
…mean most of my patients receive personalised treatment plans generated by AI	41%	33%		53%	NA EU	31%		45%	EU 50% EU	
Don't know	7%	21%	SA EU AP ★	3%		7%		5%	8%	
None of the above	5%	13%	AP ★	3%		8%		3%	5%	

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 425

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ELSEVIER

Back to home

What will be the impact of AI tools in the next 2-3 years

More clinicians in China believe AI will positively impact their work than globally. Clinicians in the USA are less likely to see future positive impacts of clinical AI tools than clinicians globally

ELSEVIER

I believe clinical AI tools will…

	Clinicians n= 2206	USA n= 247		China n= 481		India n= 292		Japan n= 170		UK n= 109		Brazil n= 108	
…save me time	70%	58%	★	77%	★ US UK	74%	US UK	72%	US	62%		78%	US UK
…allow me to make a diagnosis more quickly	58%	44%	★	75%	★ US IN JP UK BR	59%	US UK	58%	US	47%	★	64%	US UK
…help improve patient outcomes	55%	44%	★	64% (JP)	★ US JP	59%	US JP	26%	★	62%	US JP	66%	★ US JP
…enable me to more accurately diagnose patients	54%	44%	★	64%	★ US IN JP UK	56%	US UK	52%	US JP	44%	★	68%	★ US IN JP UK
…increase the quality of patient consultations	50%	34%	★	62%	★ US IN JP UK	54%	US JP	41%	★	46%	US	52%	US
…mean most of my patients receive personalised treatment plans generated by AI	40%	25%	★	53%	★ US JP UK	49%	★ US JP UK	31%	★	33%		47%	US JP UK
None of the above	6%	13%	★ CH IN JP BR	2%	★	4%		4%		15%	★ CH IN JP BR	6%	CH
Don't know	6%	14%	★ CH IN JP UK BR	1%	★	4%		6%	CH	3%	CH	2%	

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n=2206

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What will be the impact of AI tools in the next 2-3 years

Over half of doctors in the UK believe clinical AI tools will save them time (53% lower than average). This sentiment is significantly higher in China, where four in five doctors agree (81%)

I believe clinical AI tools will…

	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
…save me time	71%	65%	81% ★ US IN UK	65%	75% IN UK	53% ★	78% US IN UK
…allow me to make a diagnosis more quickly	58%	45% ★	76% ★ US IN JP UK BR	52%	58% US	45% ★	54%
…enable me to more accurately diagnose patients	57%	49% ★	74% ★ US IN JP UK BR	53% UK	53% UK	37% ★	61% UK
…help improve patient outcomes	54%	41% ★	66% JP ★ US JP UK	60% ★ US JP	18% US JP ★	50%	59% JP US JP
…increase the quality of patient consultations	51%	36% ★	71% ★ US IN JP UK BR	51%	42% US UK ★	35% ★	47%
…mean most of my patients receive personalised treatment plans generated by AI	38%	22% ★	58% ★ US IN JP UK BR	41% US UK	32% US	22% US ★	38% US UK
None of the above	7%	12% CH IN ★	3%	6% CH	6%	23% US CH IN JP BR ★	7% CH
Don't know	5%	8% CH	2% ★	6% CH	5%	3%	5%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all *doctors* ★ ★

Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Back to home

Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 1781

ELSEVIER

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What will be the impact of AI tools in the next 2-3 years

Fewer nurses in Japan than globally believe AI will help improve patient outcomes (33% vs. 56%, though low n)

ELSEVIER

I believe clinical AI tools will…

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	Nurses n= 425	USA n= 87		China n= 60		India n= 35		Japan n= 33		UK n= 31		Brazil n= 23
…save me time	70%	52%	★	73%		US 83%	US	70%		71%		
…allow me to make a diagnosis more quickly	57%	43%	★	73%	★	US UK 66%	US	58%		48%		
…help improve patient outcomes	56%	46%		63%		US JP 57%	JP	33%	★	74%		US JP Too few responses
…enable me to more accurately diagnose patients	52%	40%		53%		60%	US	52%		52%		
…increase the quality of patient consultations	48%	32%	★	53%		US 57%	US	39%		58%		US
…mean most of my patients receive personalised treatment plans generated by AI	41%	29%	★	47%		US 57%	US JP	30%		45%		
Don't know	7%	21%	★	CH IN UK 0%	★	3%		6%		3%		
None of the above	5%	15%	★	CH 2%		3%		3%		6%		

By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 425

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Demographics
(after weighting)

Demographics – care setting

Approximately one quarter of the clinicians (as represented in the results) spend most of their professional time working in primary care, particularly nurses

	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425
Primary care	24%	17% ★	32% ★ DR
Secondary care	54%	59% ★ NU	49% ★
Other	16%	19% ★ NU	14% ★
Don't know / prefer not to say	5%	5%	6%

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?
Base: n= 2206

171

Demographics – care setting

More clinicians in North America (as represented in the regional results) are spending most of their professional time working in primary care (32%) than among clinicians in the global results (24%)

	Clinicians n= 2206	North America n= 268		South America n= 164		Europe n= 439		Asia Pacific n= 1170		Middle East & Africa n= 147	
Primary care	24%	32%	★ AP	30%	AP	28%	AP	19%	★	36%	★ AP
Secondary care	54%	45%	★	48%		57%	NA MA	58%	★ NA SA MA	40%	★
Other	16%	21%	★ EU AP	20%	EU	11%	★	16%	EU	20%	EU
Don't know / prefer not to say	5%	2%	★	1%	★	4%		7%	★ NA SA EU	4%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?
Base: n= 2206

Demographics – care setting

More doctors in South America and Europe (as represented in the regional results) are in secondary care than are represented in the results for doctors globally

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Primary care	17%	20%	14%	19%	15%	28% ★ SA EU AP
Secondary care	59%	60%	70% ★ AP MA	70% ★ NA AP MA	54% ★	50%
Other	19%	17% EU	16% EU	9% ★	23% ★ EU	21% EU
Don't know / prefer not to say	5%	2%	0% ★	2% ★	7% ★ NA SA EU MA	1%

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?
Base: n= 1781

Demographics – care setting

The proportion of nurses working in secondary care (as represented in the results) is significantly higher in Asia Pacific (62%) than are represented in the results for nurses globally (49%)

	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Primary care	32%	42% AP	47% AP	38% AP	23% ★	45% AP
Secondary care	49%	30% ★	25% ★	44%	62% ★ NA SA EU MA	29% ★
Other	14%	25% ★ EU AP	25% AP	13%	9%	18%
Don't know / prefer not to say	6%	3%	3%	6%	7%	3%

By Region

Clinicians   Doctors   **Nurses**

Significantly higher/ lower than all nurses   ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?
Base: n= 425

174

Demographics – care setting

The results for clinicians in China reflect fewer views from clinicians in primary care (6%) than is reflected in the global results (24%)

Back to home

	Clinicians n= 2206	USA n= 247		China n= 481		India n= 292		Japan n= 170		UK n= 109		Brazil n= 108	
Primary care	24%	31%	★ CH JP	6%	★	29%	CH	21%	CH	24%	CH	27%	CH
Secondary care	54%	45%	★	61%	★ US BR	56%	US	63%	★ US BR	68%	★ US IN BR	50%	
Other	16%	22%	★ IN JP UK	20%	★ IN JP UK	14%		10%	★	9%	★	21%	JP UK
Don't know / prefer not to say	5%	1%	★	12%	★ US IN JP UK BR	1%	★	6%	US IN UK	0%	★	2%	

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?
Base: n= 2206

Demographics – care setting

The results for doctors in UK (87%) and Brazil (73%) reflect more views from secondary care than is reflected in the results for doctors globally (59%)

	Doctors n= 1781	USA n= 160	China n= 421		India n= 257		Japan n= 137		UK n= 78		Brazil n= 85	
Primary care	17%	19%	CH UK 7%	★	21%		CH UK BR 28%	★	CH UK BR 5%	★	11%	
Secondary care	59%	62%	53%	★	52%	★	53%		87%	★ US CH IN JP BR	73%	★ CH IN JP
Other	19%	16%	26%	★ US JP UK	25%	★ US JP UK	14%		8%	★	16%	
Don't know / prefer not to say	5%	3%	13%	★ US IN JP UK BR	1%	★	5%		IN UK BR 0%		0%	★

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?
Base: n= 1781

Demographics – care setting

The results for nurses in China and Japan reflect more views from secondary care than is reflected in the results for nurses globally

Back to home

	Nurses n= 425	USA n= 87		China n= 60		India n= 35		Japan n= 33		UK n= 31		Brazil n= 23
Primary care	32%	43%	★	CH JP 5%	★	37%		CH JP 15%	★	42%		CH JP
Secondary care	49%	29%	★	70%	★	US UK 60%		US 73%	★	US UK 48%		US Too few responses
Other	14%	29%	★	CH IN JP UK 13%		3%		6%		10%		
Don't know / prefer not to say	6%	0%	★	12%		US IN UK 0%		6%		US 0%		

By Key Country

Clinicians　　Doctors　　Nurses

Significantly higher/ lower than all nurses　★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?
Base: n= 425

Demographics – position

Clinicians equally represents doctors and nurses (50:50, using weighting). The results for nurses reflect mostly Nursing Practitioners. Doctors' results reflect mostly the equivalent of Consultant level

	Clinicians N= 2206	**Doctors** N= 1781	**Nurses** N= 425
Nursing Practitioner	37%		74% DR
Midwife	2%		4% DR
Doctor – Intern/ Junior Doctor/ Resident or equivalent	4%	7% NU	
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent	38%	77% NU	
Doctor – Fellow or equivalent	4%	8% NU	
Physician Assistant/ Physician Associate	3%	6% NU	
Other (please specify)	12%	2%	23% DR

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Which of the following best describes your current primary clinical position?

Base: n= 2206

178

Demographics – position

In South America, the results reflect the views of Physician Assistants/Associates more strongly (16%) than seen in the results for clinicians globally (3%)

	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Nursing Practitioner	37%	23% ★	36%	35% (NA)	41% (NA) ★ (NA EU)	36% (NA)
Midwife	2%	1%	0%	2%	2%	7% ★ (NA SA EU AP)
Doctor – Intern/ Junior Doctor/ Resident or equivalent	4%	2%	2%	4%	4%	2%
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent	38%	42% (SA)	29% ★	39% (SA)	39% (SA)	39%
Doctor – Fellow or equivalent	4%	2%	2%	4%	5%	6% (NA SA)
Physician Assistant/ Physician Associate	3%	1%	16% ★ (NA EU AP MA)	2%	1% ★	2%
Other (please specify)	12%	28% ★ (SA EU AP MA)	14% (AP)	14% (AP)	9% ★	8%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary clinical position?
Base: n= 2206

179

Demographics – position

In South America, the results for doctors reflect a higher level of Physician Assistant/Associate than seen globally, as well as fewer at Consultant level

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Nursing Practitioner						
Midwife						
Doctor – Intern/ Junior Doctor/ Resident or equivalent	7%	5%	4%	7%	8%	4%
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent	77%	86% ★ SA EU AP	57% ★	79% SA	77% SA	78% SA
Doctor – Fellow or equivalent	8%	5%	4%	9%	9% NA SA	13% NA SA
Physician Assistant/ Physician Associate	6%	2%	32% ★ NA EU AP MA	3%	3% ★	5%
Other (please specify)	2%	2%	3%	2%	3%	1%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary clinical position?
Base: n= 1781

Demographics – position

In the Middle East & Africa, 13% of the results from nurses reflect midwives, which is greater than seen globally for nurses (4%)

	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Nursing Practitioner	74%	45% ★	74% NA	69% NA	82% ★ NA EU	71% NA
Midwife	4%	2%	0%	4%	4%	13% ★ NA SA AP
Doctor – Intern/ Junior Doctor/ Resident or equivalent						
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent						
Doctor – Fellow or equivalent						
Physician Assistant/ Physician Associate						
Other (please specify)	23%	53% ★ SA EU AP MA	26%	27%	15% AP	16% ★

By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary clinical position?

Base: n= 425

181

Demographics – position

In China, the results reflect a greater level of Nursing Practitioners, Intern/Junior Doctors and Fellow equivalent doctors than globally

	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Nursing Practitioner	37%	20% ★	50% ★ (US IN JP UK)	36% (US)	39% (US)	39% (US)	43% (US)
Midwife	2%	1% (CH)	0% ★	4% ★ (CH US UK BR)	2% (CH)	0%	0%
Doctor – Intern/ Junior Doctor/ Resident or equivalent	4%	3%	6% ★ (US IN JP)	2%	1% ★ (IN JP)	5%	2%
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent	38%	44%	35% (CH BR)	44% (BR)	43% (CH BR)	40% (BR)	25% ★
Doctor – Fellow or equivalent	4%	2%	6% ★ (US IN BR)	1% ★ (IN)	4%	4%	1%
Physician Assistant/ Physician Associate	3%	1%	1% ★	2%	2%	0%	21% ★ (CH US IN JP UK)
Other (please specify)	12%	30% ★ (CH IN JP UK BR)	1% ★	12% (CH)	9% (CH)	12% (CH)	8% (CH)

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary clinical position?

Base: n= 2206

Demographics – position

Significantly more doctors in Brazil (as reflected in the country results) are Physician Assistants/Associates, than are in the results for doctors globally

Back to home

	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Nursing Practitioner							
Midwife							
Doctor – Intern/ Junior Doctor/ Resident or equivalent	7%	5%	13%	3%	1%	10%	4%
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent	77%	88%	71%	87%	87%	81%	51%
Doctor – Fellow or equivalent	8%	4%	13%	2%	8%	8%	1%
Physician Assistant/ Physician Associate	6%	2%	2%	4%	4%	0%	41%
Other (please specify)	2%	2%	2%	3%	0%	1%	4%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary clinical position?
Base: n= 1781

Demographics – position
All the results for nurses in China reflect Nursing Practitioners

Back to home

	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Nursing Practitioner	74%	40% ★	100% ★ US IN JP UK	71% US	79% US	77% US	
Midwife	4%	2%	0%	9% CH	3%	0%	
Doctor – Intern/ Junior Doctor/ Resident or equivalent							Too few responses
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent							
Doctor – Fellow or equivalent							
Physician Assistant/ Physician Associate							
Other (please specify)	23%	57% ★ CH IN JP UK	0% ★	20% CH	18% CH	23% CH	

By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary clinical position?

Base: n= 425

Demographics – experience

Over half (51%) of the clinicians (as represented in the results) have 11+ years' experience within their specialty

	Clinicians N= 2206	**Doctors** N= 1781		**Nurses** N= 425	
Up to 5 years	22%	14%	★	30%	★ DR
6 to 10 years	22%	17%	★	27%	★ DR
11 to 35 years	45%	56%	★ NU	35%	★
36 years or more	6%	8%	★ NU	4%	★
Prefer not to say	5%	5%		5%	

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Approximately, how many years have you been practicing as a clinician in your specialty?

Base: n= 2206

Demographics – experience

The results from South America represent more experienced clinicians (74% with 11+ years' experience) than seen in the global results (51%).

	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Up to 5 years	22%	14% ★	14% ★	17% ★	27% ★ NA SA EU MA	17%
6 to 10 years	22%	19% SA	9% ★	22% SA	24% SA	23% SA
11 to 35 years	45%	47% AP	67% ★ NA EU AP MA	49% AP	39% ★	52% AP
36 years or more	6%	15% ★ SA EU AP MA	7% AP MA	8% AP MA	3% ★	2% ★
Prefer not to say	5%	6%	3%	4%	6%	6%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Approximately, how many years have you been practicing as a clinician in your specialty?
Base: n= 2206

186

Demographics – experience

The results from doctors in North America represent more with 36+ years' experience (19%) than in the results for doctors globally (8%)

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Up to 5 years	14%	12%	19%	EU 12%	15%	13%
6 to 10 years	17%	15%	8% ★	18%	SA 18%	SA 20% SA
11 to 35 years	56%	49%	61%	NA 58%	56%	60%
36 years or more	8%	19%	★ SA EU AP MA 8%	12%	★ AP MA 5% ★	4%
Prefer not to say	5%	5%	EU 3%	2% ★	7% ★ EU	4%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors
★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Approximately, how many years have you been practicing as a clinician in your specialty?

Base: n= 1781

187

Demographics – experience

In Asia Pacific, the results reflect nurses with less experience than in the global nursing results, with two in five (40%) having up to 5 years' experience vs. 30% newer to nursing reflected in the global nursing results

	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Up to 5 years	30%	16% ★	9% ★	22%	40% ★ NA SA EU MA	21%
6 to 10 years	27%	22%	9% ★	26%	31%	26% SA
11 to 35 years	35%	45% AP	72% ★ NA EU AP MA	41% AP	23% ★	45% AP
36 years or more	4%	11% ★ AP MA	6%	4%	2%	0%
Prefer not to say	5%	6%	3%	6%	5%	3%

By Region

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Approximately, how many years have you been practicing as a clinician in your specialty?
Base: n= 425

ELSEVIER

Back to home

Demographics – experience

In Brazil, the results reflect more clinicians with 11+ years' experience (72%) than the results for clinicians globally (51%)

	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Up to 5 years	22%	15% ★	26%	US BR 40%	★ CH US JP UK BR 23%	US 19%	16%
6 to 10 years	22%	17%	BR 29%	★ US IN JP BR 21%	BR 21%	BR 23%	BR 8% ★
11 to 35 years	45%	48%	CH IN 36% ★	33% ★	46%	CH IN 48%	CH IN 64% ★ CH US IN JP UK
36 years or more	6%	14% ★ CH IN JP	1% ★	4%	CH 6%	CH 7%	CH 8% CH
Prefer not to say	5%	6%	IN 8% ★	IN JP 2% ★	4%	3%	3%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Approximately, how many years have you been practicing as a clinician in your specialty?

Base: n=2206

Demographics – experience

In Japan, the results reflect more doctors with 11-35 years' experience, nearly three in four (74%), than in the results for doctors globally (56%)

	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Up to 5 years	14%	13%	17% (JP)	17% (JP)	1% (JP) ★	9%	19% (JP) ★ (JP)
6 to 10 years	17%	14%	18%	20% (JP BR)	8% (JP BR) ★	21%	8% (JP BR) ★
11 to 35 years	56%	50%	53%	54%	74% ★ US CH IN UK	56%	62%
36 years or more	8%	18% ★ CH IN BR	3% ★	5%	12%	14% CH IN	8% CH IN	CH
Prefer not to say	5%	6%	10% UK	4% ★ IN JP UK BR	4%	0% ★	2%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Approximately, how many years have you been practicing as a clinician in your specialty?

Base: n= 1781

190

Demographics – experience

In India, the results reflect nurses with less experience than global, with nearly two thirds of nurses (63%) having up to 5 years' experience vs. half as many (30%) newer to nursing reflected in the global nursing results

	Nurses n= 425	USA n= 87		China n= 60		India n= 35		Japan n= 33		UK n= 31		Brazil n= 23
Up to 5 years	30%	18%	★	35%		US 63%	★ CH US UK	45%	US	29%		
6 to 10 years	27%	20%		40%	★ US	23%		33%		26%		Too few responses
11 to 35 years	35%	46%	★ CH IN JP	18%	★	11%	★	18%		39%	CH IN	
36 years or more	4%	9%	★ CH	0%		3%		0%		0%		
Prefer not to say	5%	7%		7%		0%		3%		6%		

By Key Country

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all *nurses* ★★

Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Approximately, how many years have you been practicing as a clinician in your specialty?

Base: n= 425

ELSEVIER

Back to home

Demographics – role

Over three quarters (79%) of the clinicians (as represented in the results) work in direct patient care, particularly doctors

	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425
Direct patient care	79%	84% ★ NU	74% ★
Teaching/ education	65%	81% ★ NU	49% ★
Leadership/ administration/ decision making	56%	55%	57%
Medical research	53%	80% ★ NU	27% ★
Informatics	15%	16%	14%
Other responsibility (please specify)	3%	2%	4% ★ DR
Prefer not to say	1%	1%	2%

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Which of the following do your current responsibilities as a clinician include, if any?
Base: n= 2206

192

Demographics – role

Fewer clinicians in North America (as represented in the results) work in medical research (43%) than in the results for clinicians globally (53%)

	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Direct patient care	79%	82% ^{SA MA}	70% ★	80% ^{SA MA}	81% ^{SA MA}	64% ★
Teaching/ education	65%	74% ★ ^{AP}	79% ★ ^{EU AP}	71% ★ ^{AP}	58% ★	71% ^{AP}
Leadership/ administration/ decision making	56%	54%	59%	57%	56%	54%
Medical research	53%	43% ★	65% ★ ^{NA EU AP}	55% ^{NA}	52% ^{NA}	62% ★ ^{NA AP}
Informatics	15%	13%	19%	18% ^{AP}	14%	17%
Other responsibility (please specify)	3%	4%	3%	3%	3%	1%
Prefer not to say	1%	2%	0%	1%	1%	0%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following do your current responsibilities as a clinician include, if any?
Base: n= 2206

193

Demographics – role

More doctors in North America (as represented in the results) work in direct patient care (92%) and teaching/education (89%) than in the results for doctors globally (84% and 81% respectively)

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Direct patient care	84%	92% ★ AP MA / EU	86%	83%	84%	78%
Teaching/ education	81%	89% ★ EU AP	84%	79%	80%	81%
Leadership/ administration/ decision making	55%	60% AP	61%	63% ★ AP / AP	48% ★	63% AP
Medical research	80%	69% ★	83% NA	74% ★	83% ★ NA EU	83% NA
Informatics	16%	12%	10%	17%	18% NA SA	14%
Other responsibility (please specify)	2%	2%	2%	2%	2%	0%
Prefer not to say	1%	1%	1%	1%	1%	1%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following do your current responsibilities as a clinician include, if any?
Base: n= 1781

194

Demographics – role

Around half of nurses in South America (54%) and Middle East & Africa (50%), as represented in the nursing results, work in direct patient care, which is lower than in the global nursing results (74%)

	Nurses n= 425	North America n= 92		South America n= 32			Europe n= 81		Asia Pacific n= 180		Middle East & Africa n= 38	
Direct patient care	74%	72%	MA	54%	★		77%	SA MA	78%	SA MA	50%	★
Teaching/ education	49%	59%	AP	74%	★	AP	62%	★ AP	36%	★	61%	AP
Leadership/ administration/ decision making	57%	47%		57%			50%		64%	NA EU MA	45%	
Medical research	27%	19%		47%	★	NA AP	36%	NA AP	20%		42%	★ NA AP
Informatics	14%	14%		28%	★	AP	19%	AP	9%		21%	AP
Other responsibility (please specify)	4%	5%		3%			3%		4%		3%	
Prefer not to say	2%	2%		0%			1%		2%		0%	

By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following do your current responsibilities as a clinician include, if any?

Base: n= 425

195

Demographics – role

Around nine in ten clinicians in China (87%) and in the UK (91%), as represented in the results, work in direct patient care than in the results for clinicians globally (79%)

	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Direct patient care	79%	83%	JP BR 87% ★	IN JP BR 80%	BR 73%	91% ★ IN JP BR	65% ★
Teaching/ education	65%	73% ★ CH IN JP	52% ★	59% ★	56% ★	75% ★ CH IN JP	84% ★ CH US IN JP
Leadership/ administration/ decision making	56%	52%	53%	57%	75% ★ US CH IN BR	84% ★ US CH IN BR	57%
Medical research	53%	44% ★	57%	US JP 50%	44% ★	51%	66% ★ US IN JP UK
Informatics	15%	12%	13%	17%	JP 9% ★	15%	18% JP
Other responsibility (please specify)	3%	4%	CH JP UK 1% ★	4%	CH JP UK 0%	0%	3% JP
Prefer not to say	1%	2%	IN 1%	IN 0%	5% ★ CH IN UK BR	1%	1%

By Key Country

Clinicians Doctors Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following do your current responsibilities as a clinician include, if any?
Base: n= 2206

196

Demographics – role

Fewer doctors in China, lower than a third (32%), as represented in the results, work in leadership roles than are represented in the results for doctors globally (55%)

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	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Direct patient care	84%	92% ★	CH JP 84%	86%	83%	91%	87%
Teaching/ education	81%	89% ★	CH 77%	84%	CH 85%	92% ★	CH 85%
Leadership/ administration/ decision making	55%	61%	CH 32% ★	63% ★	CH 69% ★	CH 81% ★ US CH IN BR	62% CH
Medical research	80%	69% ★	92% ★ US IN JP UK BR	77%	77%	77%	85% US
Informatics	16%	11%	19%	US 17%	18%	21%	US 11%
Other responsibility (please specify)	2%	3%	CH 0% ★	3%	CH 1%		2%
Prefer not to say	1%	1%	1%		1%	1%	1%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following do your current responsibilities as a clinician include, if any?
Base: n= 1781

Demographics – role

Nearly half as many nurses in China and Japan (both 27%), as represented in the results, work in teaching/education as are represented in the global nursing results (49%)

Back to home

	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Direct patient care	74%	74%	90% ★ US IN JP	74%	64%	90% ★ JP	
Teaching/ education	49%	56%	CH IN JP 27% ★	34%	27% ★	58% CH JP	
Leadership/ administration/ decision making	57%	43% ★	75% ★ US IN	51%	82% ★ US IN	87% ★ US IN	Too few responses
Medical research	27%	18%	22%	23%	12%	26%	
Informatics	14%	13%	JP 7%	17%	JP 0% ★	10%	
Other responsibility (please specify)	4%	6%	2%	6%	0%	0%	
Prefer not to say	2%	2%	2%		9% ★	0%	

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following do your current responsibilities as a clinician include, if any?

Base: n= 425

Demographics – institute setting

Around two thirds (65%) of the clinicians (as represented in the results) work for a hospital, medical school or healthcare provider (1/2)

Back to home

1/2	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425	
Hospital/ Medical School/ Healthcare Provider	65%	66%	63%	
University	18%	18%	17%	
Integrated Health Network (IDN)	4%	1% ★	6%	★ DR
The Government	4%	3%	4%	
Other (please specify)	4%	4%	3%	
College	2%	2%	2%	
Commercial/ Corporate	2%	3% ★ NU	1%	★

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Which of the following best describes your current primary place of work?
Base: n= 2206

199

Demographics – institute setting

Around two thirds (65%) of the clinicians (as represented in the results) work for a hospital, medical school or healthcare provider (2/2)

	2/2	**Clinicians** N= 2206	**Doctors** N= 1781	**Nurses** N= 425
Research Institute		1%	2%	1%
Prefer not to say		1%	1%	1%

Overall

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Which of the following best describes your current primary place of work?

Base: n= 2206

Demographics – institute setting

More clinicians in Asia Pacific (71%) than global (65%), as represented in the results, work for a hospital, medical school or healthcare provider (1/2)

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	Clinicians n= 2206	North America n= 268		South America n= 164		Europe n= 439		Asia Pacific n= 1170		Middle East & Africa n= 147	
Hospital/ Medical School/ Healthcare Provider	65%	54%	★	51%	★	68%	SA NA MA	71%	★ (NA SA MA)	45%	★
University	18%	23%	★ AP	28%	★ EU AP	17%		14%	★	33%	★ NA EU AP
Integrated Health Network (IDN)	4%	3%		4%		3%		5%	MA	1%	
The Government	4%	6%	EU AP	5%		2%		3%		7%	EU AP
Other (please specify)	4%	7%	★ AP	5%	AP	6%	★ AP	1%	★	5%	AP
College	2%	1%		5%	★ NA EU AP	0%	★	2%	EU	6%	★ NA EU AP
Commercial/ Corporate	2%	2%	EU	1%		0%	★	2%	EU	0%	

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all *clinicians* ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary place of work?
Base: n=2206

Demographics – institute setting

More clinicians in Asia Pacific (71%) than global (65%), as represented in the results, work for a hospital, medical school or healthcare provider (1/2)

2/2	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Research Institute	1%	0%	1%	2% NA	1%	3% NA
Prefer not to say	1%	3% ★ EU AP	1%	1%	1%	0%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary place of work?

Base: n= 2206

Demographics – institute setting

Around a third of doctors in North America (35%) and Middle East & Africa (32%), higher than global (18%), as represented in the results, work for a university (1/2)

1/2	Doctors n= 1781	North America n= 176		South America n= 132		Europe n= 358		Asia Pacific n= 990		Middle East & Africa n= 109	
Hospital/ Medical School/ Healthcare Provider	66%	46%	★	66%	NA MA	67%	NA MA	72%	★ NA MA	51%	★
University	18%	35%	★ SA EU AP	17%		19%	AP	13%	★	32%	★ SA EU AP
Other (please specify)	4%	9%	★ AP	4%	AP	5%	AP	1%	★	6%	AP
The Government	3%	4%		4%		2%		3%		3%	
Commercial/ Corporate	3%	3%	EU	2%		1%	★	4%	EU	1%	
Research Institute	2%	1%		1%		3%		2%		3%	
College	2%	0%		1%		1%		3%	NA EU	1%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary place of work?

Base: n= 1781

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Demographics – institute setting

Around a third of doctors in North America (35%) and Middle East & Africa (32%), higher than global (18%), as represented in the results, work for a university (2/2)

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Integrated Health Network (IDN)	1%	1%	4% ★ AP	2%	1%	2%
Prefer not to say	1%	2%	1%	1%	1%	1%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★ ★

Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary place of work?

Base: n= 1781

Demographics – institute setting

Around a third of nurses in South America (35%) and Middle East & Africa (39%), lower than global (63%), as represented in the results, work for a hospital, medical school or healthcare provider (1/2)

1/2	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Hospital/ Medical School/ Healthcare Provider	63%	61% SA MA	35% ★	68% SA MA	69% SA MA	39% ★
University	17%	12%	40% ★ NA EU AP	15%	14%	34% ★ NA EU AP
Integrated Health Network (IDN)	6%	6%	3%	5%	9%	
The Government	4%	8%	6%	3%	3%	11%
Other (please specify)	3%	6%	6% AP	6%	1% AP	3%
College	2%	1%	9% ★ NA EU AP	0%	2%	11% ★ NA EU AP
Prefer not to say	1%	4%	★ AP	1%	1%	

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary place of work?
Base: n= 425

Demographics – institute setting

Around a third of nurses in South America (35%) and Middle East & Africa (39%), lower than global (63%), as represented in the results, work for a hospital, medical school or healthcare provider (2/2)

2/2	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Research Institute	1%	0%	Too few responses	1%	1%	3%
Commercial/ Corporate	1%	2%			1%	

By Region

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which of the following best describes your current primary place of work?

Base: n= 425

Demographics – institute setting

Over three quarters of clinicians in China (85%) and the UK (76%), as represented in the results, work for a hospital, medical school or healthcare provider, which is higher than seen globally (65%) (1/2)

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1/2	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Hospital/ Medical School/ Healthcare Provider	65%	55% ★	85% ★ US IN JP UK BR	57% ★ BR	63% BR	76% ★ US IN JP BR	45% ★
University	18%	22% CH IN UK	8% ★	13% ★ CH	27% ★ CH IN UK	12%	35% ★ CH US IN UK
Integrated Health Network (IDN)	4%	2%	3%	7% ★ CH US BR	5%	6% BR	1%
The Government	4%	7% ★ CH JP UK	2% ★	7% ★ CH JP UK	0% ★	1%	4% JP
Other (please specify)	4%	7% ★ CH IN JP	0% ★	1% CH	0% ★	5% CH IN JP	6% CH IN JP
College	2%	1%	1%	3% CH US	2%		7% ★ CH US JP UK
Commercial/ Corporate	2%	3% CH	0% ★	7% ★ CH US JP UK BR	2% CH		1%

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary place of work?

Base: n= 2206

Demographics – institute setting

Over three quarters of clinicians in China (85%) and the UK (76%), as represented in the results, work for a hospital, medical school or healthcare provider, which is higher than seen globally (65%) (2/2)

2/2	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Research Institute	1%	0%	0% ★	3%	★ CH US JP 0%		1%
Prefer not to say	1%	4%	★ CH IN 0%	1%	2%	1%	1%

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary place of work?

Base: n= 2206

Demographics – institute setting

Around twice as many doctors in the USA and Japan (both 35%) than globally (18%), as represented in the results, work for a university (1/2)

1/2

	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85	
Hospital/ Medical School/ Healthcare Provider	66%	46%	★ 91% ★ US IN JP UK BR	52% ★	58%	US 83% ★ US IN JP BR	65%	US IN
University	18% ★ CH IN UK BR	35%	★ 5% ★	14% CH	35% ★ CH IN UK BR	10%	21%	CH
Other (please specify)	4%	8% ★ CH IN JP	0% ★	3% CH	1%	4%	CH 4%	CH
The Government	3% CH JP	4%	0% ★	8% ★ CH JP UK	0% ★	1%	4%	CH JP
Commercial/ Corporate	3% CH	3%	0% ★	12% ★ CH US JP BR	4%	CH	2%	CH
Research Institute	2%		0% ★	4% CH US	1%		1%	
College	2%		1%	7% ★ CH US JP UK	0%		1%	

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary place of work?

Base: n= 1781

209

Demographics – institute setting

Around twice as many doctors in the USA and Japan (both 35%) than globally (18%), as represented in the results, work for a university (2/2)

	2/2	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Integrated Health Network (IDN)		1%	1% CH		0%			1% CH
Prefer not to say		1%	3%	1%	1%	1%	1%	1%

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary place of work?

Base: n= 1781

Demographics – institute setting

Eight in ten nurses in China (80%), higher than global (63%), as represented in the results, work for a hospital, medical school or healthcare provider (1/2)

1/2	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Hospital/ Medical School/ Healthcare Provider	63%	64%	80% ★ US	63%	67%	68%	
University	17%	8% ★	10%	11%	18%	13%	
Integrated Health Network (IDN)	6%	3%	7%	14% US	9%	13%	Too few responses
The Government	4%	9%	3%	6%			
Other (please specify)	3%	7% CH				6% CH	
College	2%	1%			3%		
Prefer not to say	1%	5% ★			3%		

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary place of work?

Base: n= 425

211

Demographics – institute setting

Eight in ten nurses in China (80%), higher than global (63%), as represented in the results, work for a hospital, medical school or healthcare provider (2/2)

	2/2	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Research Institute		1%		Too few responses	3%		Too few responses	
Commercial/ Corporate		1%	2%		3%			

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which of the following best describes your current primary place of work?

Base: n= 425

Demographics – gender

The results reflect the views of both male and female clinicians

	Clinicians N= 2206	**Doctors** N= 1781	**Nurses** N= 425
Woman	53%	31% ★	75% ★ DR
Man	44%	66% NU ★	22% ★
Non-binary or gender diverse	0%	0%	0%
Prefer not to say	3%	3%	2%

Overall

| Clinicians | Doctors | Nurses |

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

Question: Which gender do you most identify with?

Base: n= 2206

Demographics – gender

In South America, there is higher representation of female clinicians in the results (63%) than in the results for clinicians globally (53%)

	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Woman	53%	55%	63% ★ EU AP MA	48% ★	54% EU	49%
Man	44%	37% ★	37%	51% ★ SA NA AP	43%	46%
Non-binary or gender diverse	0%			1%	0%	2% ★ NA AP
Prefer not to say	3%	8% ★ SA EU AP MA	★	1% ★	3% SA EU	3% SA EU

By Region

Clinicians   Doctors   Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which gender do you most identify with?

Base: n= 2206

Demographics – gender

In South America, there is higher representation in the results of female doctors (43%) than in the results for doctors globally (31%)

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Woman	31%	35%	43% ★ EU AP MA	33%	28%	29%
Man	66%	58% ★	57% ★	65%	69% NA SA	66%
Non-binary or gender diverse	0%			0%	0%	2% ★
Prefer not to say	3%	7% ★ SA EU AP	0%	1%	3%	3%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which gender do you most identify with?
Base: n= 1781

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Demographics – gender

In Europe, there is higher representation in the results of male nurses (36%) than in the global nursing results (22%)

	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Woman	75%	74%	84%	EU 62% ★	80%	EU 68%
Man	22%	18%	16%	36% ★ SA NA AP	17%	26%
Non-binary or gender diverse	0%			1%		3% AP
Prefer not to say	2%	8%	★ EU AP 0%	0%	3%	3%

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Which gender do you most identify with?

Base: n= 425

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Demographics – gender

In Brazil, there is higher representation of female clinicians in the results (66%) than in the results for clinicians globally (53%)

	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108	
Woman	53%	55%	55%	53%	47%	51%	66%	★ CH IN JP UK
Man	44%	37% ★	43%	44%	48%	US BR 48%	BR 34%	★
Non-binary or gender diverse	0%			1%				
Prefer not to say	3%	8%	★ CH IN UK BR 2%	2%	5%	★ CH BR 1%		

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which gender do you most identify with?

Base: n= 2206

Demographics – gender

In China (26%) and Japan (12%), there is lower representation of female doctors than in the results for doctors globally (31%)

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	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Woman	31%	36%	CH JP 26% ★	JP 32%	JP 12% ★	28%	JP 45% CH IN JP UK ★
Man	66%	56% ★	71% ★	US BR 65%	84% US CH IN UK BR ★	69%	55% ★
Non-binary or gender diverse	0%			1%	CH		
Prefer not to say	3%	8%	★ CH IN BR 3%	2%	4%	3%	

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which gender do you most identify with?

Base: n=1781

218

Demographics – gender

In the global nursing results, three quarters (75%) of the responses are from female nurses

	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Woman	75%	74%	83%	74%	82%	74%	
Man	22%	17%	15%	23%	12%	26%	Too few responses
Non-binary or gender diverse	0%	0%	0%	0%	0%	0%	
Prefer not to say	2%	9% ★	2%	3%	6%	0%	

By Key Country

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Which gender do you most identify with?

Base: n= 425

Demographics – age

The results reflect the views of a spread of age groups

	Clinicians N= 1938	Doctors N= 1560	Nurses N= 378	
21-35 years old	31%	19%	★ 42%	★ DR
36-45 years old	27%	30%	★ NU 24%	★
46-55 years old	22%	25%	★ NU 18%	★
56+ years old	21%	27%	★ NU 16%	★

Overall

Clinicians	Doctors	Nurses

Question: Please record your age in years in the space provided, as of your last birthday.
"Prefer not to say" answers are excluded from the responses.
Base: n= 1938

Demographics – age

In Asia Pacific, there is a higher representation in the results of younger clinicians (under 35) and a lower representation in the results of older clinicians (aged 46+).

	Clinicians n= 1938	North America n= 226		South America n= 152		Europe n= 413		Asia Pacific n= 1001		Middle East & Africa n= 137	
21-35 years old	31%	11%	★	14%	★	22%	★	43%	★ NA SA EU MA	18%	★ SA NA
36-45 years old	27%	20%	★	28%		23%		29%	NA EU	29%	NA
46-55 years old	22%	24%	AP	27%	AP	25%	AP	17%	★	35%	★ NA EU AP
56+ years old	21%	45%	★ SA EU AP MA	31%	★ AP MA	29%	★ AP MA	11%	★	18%	AP

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians ★ ★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please record your age in years in the space provided, as of your last birthday.
"Prefer not to say" answers are excluded from the responses.
Base: n= 1938

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Demographics – age

In North America (46%) and Europe (37%), there is a higher representation in the results of older doctors (56+ years) than in the results for doctors globally (27%)

	Doctors n= 1560	North America n= 153	South America n= 122	Europe n= 334	Asia Pacific n= 842	Middle East & Africa n= 101
21-35 years old	19%	10% ★	20% NA EU	13% ★	23% NA EU ★	16%
36-45 years old	30%	21% ★	24%	27%	35% NA SA EU MA ★	22%
46-55 years old	25%	22%	30%	23%	24%	40% NA EU AP ★
56+ years old	27%	46% ★ SA EU AP MA	26%	37% AP ★ SA AP MA	18% ★	23%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please record your age in years in the space provided, as of your last birthday.
"Prefer not to say" answers are excluded from the responses.
Base: n= 1560

Demographics – age

In Asia Pacific, there is a higher representation in the results of younger nurses (62% are under 35) than in the results for nurses globally (42%)

	Nurses n= 378	North America n= 73	South America n= 30	Europe n= 79	Asia Pacific n= 159	Middle East & Africa n= 36
21-35 years old	42%	12% ★	7% ★	32%	ⁱSA NA⁺ 62% ★ NA SA EU MA	19% ★
36-45 years old	24%	19%	33%	19%	23%	36% EU
46-55 years old	18%	25% AP	24%	27% AP	11% ★	31% AP
56+ years old	16%	44% ★ EU AP MA	36% ★ AP MA	22% AP	4% ★	14% AP

By Region

Clinicians	Doctors	Nurses

Significantly higher/ lower than all nurses ★★
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please record your age in years in the space provided, as of your last birthday.
"Prefer not to say" answers are excluded from the responses.
Base: n= 378

Demographics – age

In the USA, there is a higher representation in the results of older clinicians (42% are aged 56+) than in the results for clinicians globally (21%)

Back to home

	Clinicians n= 1938	USA n= 206	China n= 383	India n= 272	Japan n= 149	UK n= 101	Brazil n= 105
21-35 years old	31%	11% ★	48% ★ US JP UK BR	54% ★ US JP UK BR	35% US BR	25% US BR	14% ★
36-45 years old	27%	21%	35% ★ US IN JP	21%	23%	25%	31% IN
46-55 years old	22%	26% CH IN	12% ★	14% ★	27%	22% CH IN	23% CH IN
56+ years old	21%	42% ★ CH IN JP UK	4% ★	11% ★ CH	15% CH	27% CH	32% CH IN JP ★ CH IN JP

By Key Country

Clinicians   Doctors   Nurses

Significantly higher/ lower than all *clinicians* ★ ★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please record your age in years in the space provided, as of your last birthday.
"Prefer not to say" answers are excluded from the responses.
Base: n= 1938

Demographics – age

In China, there is a higher representation in the results of younger doctors (70% are under 45) than in the results for doctors globally (48%)

	Doctors n= 1560	USA n= 137		China n= 329	India n= 238		Japan n= 118		UK n= 71		Brazil n= 82	
21-35 years old	19%	12%	★	29%	24% ★ US JP UK		7% ★	US JP UK	10%		24%	US JP UK
36-45 years old	30%	20%	★	42%	31% ★ US IN JP UK BR		26% US		24%		22%	
46-55 years old	25%	23%		20%	23%		35%		21% ★ US CH IN UK		29%	
56+ years old	27%	45% ★	CH IN JP BR	9% ★	23%		32% CH		45% CH		24% ★ CH IN BR	CH

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please record your age in years in the space provided, as of your last birthday.
"Prefer not to say" answers are excluded from the responses.
Base: n= 1560

225

Demographics – age

In the USA, there is a higher representation in the results of older nurses (two thirds, 68%, are aged 46+) than in the results for nurses globally (where this is one third, 34%)

	Nurses n= 378	USA n= 69	China n= 54	India n= 34	Japan n= 31	UK n= 30	Brazil n= 23
21-35 years old	42%	10% ★	65% ★ US UK	82% ★ US UK	61% ★ US	40% US	
36-45 years old	24%	22%	30%	12%	19%	27%	Too few responses
46-55 years old	18%	29% ★ CH IN	6% ★	6%	19% CH	23% CH IN	
56+ years old	16%	39% ★ CH IN JP UK	0% ★	0% ★	0% ★	10% CH	

By Key Country

Clinicians   Doctors   **Nurses**

Significantly higher/ lower than all nurses ★★
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

Question: Please record your age in years in the space provided, as of your last birthday.
"Prefer not to say" answers are excluded from the responses.
Base: n= 378