Clinician of the Future

2025 Databook

July 2025

For further information go to Clinician of the Future 2025





Advancing human progress together

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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

Al 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 Al 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) Al tool is identifying drug interactions and writing patient letters. Clinical-specific Al 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 highquality peer reviewed content would increase their trust in clinical-specific AI tools.

The future of healthcare



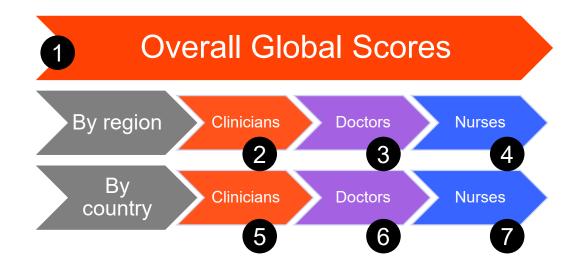
- Within the next 2 to 3 years, over half of clinicians believe:
 - > Universal healthcare will be available
 - Hospital stays will be shorter
 - But health costs will be higher in real terms
 - And AI will be used to analyze all medical images to identify abnormalities
- Clinical AI tools they think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







The bottom right of the slide —

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

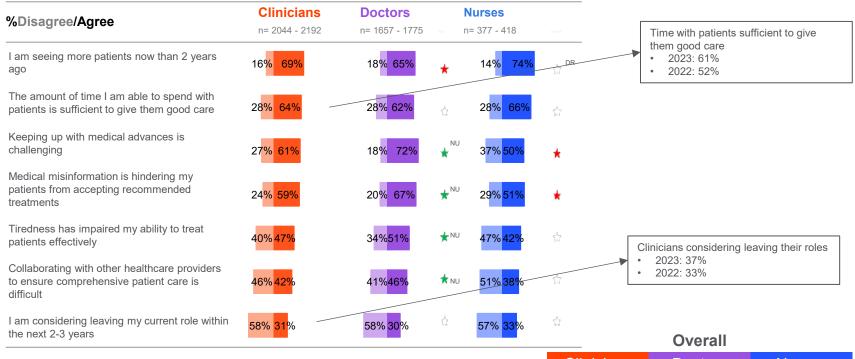


Current State of Healthcare



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





Base: n= 2044 - 2192



Doctors



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 <mark>% 69%</mark>	19 <mark>% 62% *</mark>	23 <mark>% 63%</mark> ਨੂੰ	23% 63%	12% <mark>74%</mark>	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 <mark>% 64%</mark>	38% <mark>50%</mark> *	37% <mark>56%</mark> 🕏	41% <mark>52% *</mark>		NA SA EU MA 28% 62%
Keeping up with medical advances is challenging	27 <mark>% 61%</mark>	20 <mark>% 65%</mark>	19% 78% ★	24 <mark>% 65%</mark>	3 <mark>2%</mark> 55%	AP ★ 23 <mark>% 70% ★</mark>
Medical misinformation is hindering my patients from accepting recommended treatments	24 <mark>% 59%</mark>	15% 71% **	19% 71% *	26% <mark>59%</mark>	27 <mark>%54%</mark>	± 19 <mark>% 70</mark> %
Tiredness has impaired my ability to treat patients effectively	40% <mark>47%</mark>	38% <mark>47%</mark>	33% 61% NA EU	35% <mark>48%</mark>	4 <mark>4%</mark> 44%	38% 54% AP
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	46% <mark>42%</mark>	37%48%	32% 58%	★ ^{AP} 39% <mark>51%</mark>	55% <mark>32</mark> %	* 34% <mark>56%</mark>
I am considering leaving my current role within the next 2-3 years	58% <mark>31</mark> %	★ AP	55% <mark>36</mark> %	★ _{AP}	67% <mark>22</mark> %	★ 51% <mark>40</mark> %

Base: n= 2044 - 2192

By Region

Clinicians

Doctor



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 <mark>% 68%</mark> 🍹	15% 80% NA	17 <mark>% 72%</mark>	19 <mark>% 72%</mark>	17 <mark>% 7</mark> 6%
Medical misinformation is hindering my patients from accepting recommended treatments	20% 67%	16% 71% FJ	29 <mark>% 62%</mark>	23 <mark>%</mark> 62%	18 <mark>% 69%</mark> 🐥	17% 72% EU
I am seeing more patients now than 2 years ago	18% 65%	24 <mark>%53% *</mark>	21 <mark>% 68%</mark>	21 <mark>%</mark> 63%	16 <mark>% 66%</mark> 🐇	NA 17% 76% ★ NA
The amount of time I am able to spend with patients is sufficient to give them good care	28% 62%	35% <mark>51%</mark>	31% 63%	39% <mark>53% 🜟</mark>	21 <mark>% 67%</mark> 🛊	NA EU 30% 65% NA EU
Tiredness has impaired my ability to treat patients effectively	34% 51%	41% <mark>40</mark> %	39% <mark>51%</mark>	3 <mark>7%</mark> 49% 📆	28 <mark>%56%</mark> ★ ^E	u MA 49%<mark>44%</mark>
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	41% <mark>46%</mark>	3 <mark>5%49%</mark>	38% <mark>49%</mark>	36% <mark>52% </mark> ★	46% <mark>42% *</mark>	39%<mark>51%</mark>
I am considering leaving my current role within the next 2-3 years	58% 30	43%45 % ★ SA AP MA	64% <mark>29</mark> %	52%399 * AP MA	61% <mark>24</mark> % *	67% <mark>26</mark> %

By Region

Clinician

Doctors



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 <mark>% 71%</mark> 🗸	\.\ \.\.	25% 62%	8% 81%	EU 16% 78% Ñ
The amount of time I am able to spend with patients is sufficient to give them good care	28% 66%	41% <mark>49% *</mark>	Too few responses	43% <mark>51% *</mark>	16 <mark>% 80%</mark> ★ ^E	NA U MA 26% 58%
Medical misinformation is hindering my patients from accepting recommended treatments	29% <mark>51%</mark>	14% 71% * EU	7	29% <mark>56%</mark>	3 <mark>6%39% ★</mark>	21 <mark>% 68%</mark>
Keeping up with medical advances is challenging	3 <mark>7%</mark> 50%	22% 62% * AP	23% 77% * AP	31%57%	3 <mark>46%39% ★</mark>	29% 63%
Tiredness has impaired my ability to treat patients effectively	47% <mark>42</mark> %	35% 55%	7h.7	34%47%	60% <mark>31</mark> % *	28% 64%
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	51% <mark>38</mark> 9	38%47%	25% 68%	41% 49%	64% <mark>23</mark> % *	29% 61%
I am considering leaving my current role within the next 2-3 years	57% <mark>33</mark>	42% 46% ★ AP	Å.	★ AF	72% <mark>2</mark> 0% *	★ AP

By Region

Clinicians Doctors Nurses



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



%Disagree/Agree	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 <mark>% 69%</mark>	19% 61%	9% 75% JF	10% 79% J	s P 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% <mark>51%</mark>	13% 79% → BF		s K R 38% <mark>50%</mark>	± 31% 60%	್ಷೆ 3 <mark>3%</mark> 60%
Keeping up with medical advances is challenging	27 <mark>% 61%</mark>	17% 67%			н Р 53% <mark>2</mark> 9	★ 27% 59%	JP IN CH S JP J 18% 79% UK
Medical misinformation is hindering my patients from accepting recommended treatments	24 <mark>% 59%</mark>	12% 74% ★	29 <mark>%45% ★</mark>	19 <mark>% 69% 1</mark>		★ 33%54%	JP CH JP JP 25 <mark>% 64% 1,8</mark>
Tiredness has impaired my ability to treat patients effectively	40% <mark>47%</mark>	JF 37%47% ⊸ੂ∟ੂ	ى 4 <mark>2%43% ك</mark>	51%42%	58% 25	★ 43%41%	JP
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	46% <mark>42%</mark>	32% <mark>51% ★ CH IN JF</mark>		52% <mark>37</mark> % 5	Р	★ 42% <mark>49%</mark>	CH IN JP 36% 57%
I am considering leaving my current role with the next 2-3 years	in 58% <mark>31</mark> %	41%45% CH IN	75% <mark>1</mark> 4% *	64% 27% C		★ 48%44%	CH, IN JEA 59% 33° CH,

By Key Country

Clinicians

Doctor





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 India n= 392 - 419 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%	11% 76%	21% 72%	JP 50%359	± 15% 73%	JP S JP S JP S JP
Medical misinformation is hindering my patients from accepting recommended treatments	20% 67%	15% 73% BR	17% 67%	12% 81%	uus uuk BR 38%45%	± 30%54%	± 36% 58%
I am seeing more patients now than 2 years ago	18% 65%	21%55%	14% 68%	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% <mark>50% 🗼</mark>	15% 71%	JS JK 21% 72% F	us VIK 44%39%	★ 39% 50%	★ 31% 61% JP
Tiredness has impaired my ability to treat patients effectively	34% 51%	41%41% 🛨	18% 64% JP US		JP مراب 44% 36	★ 40%399	JP ★ 43% 49%
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	41% 46%	33% 51% CH		4 <mark>0%</mark> 54%	CH JP ★ 66% 22	★ 36% 53%	CH JP
I am considering leaving my current role withit the next 2-3 years	in 58% 30	43%44%	63% 19%	64% <mark>27</mark> %	сн 59% 25	∜ 45% <mark>45</mark> %	CH IN JP 1 69% 26

By Key Country

Clinicians Doctors Nurses





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 55 6% 889	us %	/L }v	j j
The amount of time I am able to spend with patients is sufficient to give them good care	28% 66%	37% <mark>53% 🛨</mark>	10% 87%	us	% JK 32% 61%	23% 70%	☆ ☆
Medical misinformation is hindering my patients from accepting recommended treatments	29 <mark>%</mark> 51%	10% 76% chin		★ 26% 56%	сн _{ЈР} 	★ 37%53%	Too few responses
Keeping up with medical advances is challenging	3 <mark>7%</mark> 50%	16% 65% ★ ^{JP}	55% <mark>28</mark> %	★ 37%49%	CH JP 56% 22%	★ 39%45%	$\begin{array}{ccc} JP & & & \\ -\frac{l_{\perp}}{J\sqrt{J}} & & & \frac{1}{J\sqrt{J}} \end{array}$
Tiredness has impaired my ability to treat patients effectively	47% <mark>42</mark> %	34%54% CH IN	67% <mark>22</mark> %	★ 64% 33%	73% 13%	★ 47%43%	DH JP
Collaborating with other healthcare providers to ensure comprehensive patient care is difficult	51% <mark>38</mark> 9	32%51% ★ JP	75% 1 <mark>5</mark> %	★ 63% 20%	★ 72% 1 3%	★ 48%45%	CH UP Sin Sin
I am considering leaving my current role with the next 2-3 years	in 57% 33	39%47% ★ ^{CH} JP	86% 10%	* 64% 27%	сн Б 81% 16%	50%43%	CH _I

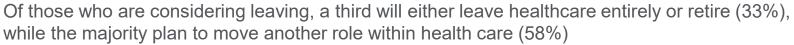
By Key Country

Clinicians Doctors Nurses



Why clinicians are considering leaving their role





Base: n= 635



	Clinicians N= 635	Doctors N= 492	Nurses	
Stay in healthcare but changing role or location	58%	60%	56% 🚌	
Move to a non-healthcare related job	<mark>1</mark> 3%	9% 🛧	<mark>1</mark> 6% ★	DR
Take a leave of absence/ sabbatical	3%	6% \star	NU 1% ★	
Retire	<mark>20</mark> %	21% 54	<mark>19</mark> % 55	
Don't know / prefer not to say	7%	5% 🕏	8% \$	



Significantly higher/ lower than all clinicians

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 Am	nerica	South A	merica	Europe n= 161)	Asia Pa	cific	Middle Eas	t & Africa	Back hom
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	<mark>1</mark> 3%	9%	ů	<mark>23</mark> %	NA EU	7%	*	<mark>1</mark> 5%	É EU	20%	EU	
Take a leave of absence/ sabbatical	3%	2%	Taj	4%	W	4%	N	2%	Tal.	5%	W	
Retire	<mark>20</mark> %	36%	★AP MA	<mark>25</mark> %	AP MA	<mark>24</mark> %	JAP MA	<mark>1</mark> 2%	*	6%	*	
Don't know / prefer not to say	7%	6%	چالے پا۔یا	14%	MA MA	7%	چالے پا-ن	6%	\$5	0%	چالے آ۔ آ	

Only asked to those who are considering leaving.

Base: n= 635

By Region

Clinicians

Docto

Nurses

Significantly higher/ lower than all clinicians

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 A	America	South A	merica	Europ n= 126	e	Asia Pa	cific		Back to home
Stay in healthcare but changing role or location	60%	47%	*	59%	ا ارما	55%	الح أد أ	67%	N.		
Move to a non-healthcare related job	9%	<mark>1</mark> 1%	EU	<mark>16</mark> %	EU T	3%	*	9%	ģ	ជ	
Take a leave of absence/ sabbatical	6%	4%	W	8%	14	9%	L.	4%	N.	Too few responses	
Retire	<mark>21</mark> %	32%	★ SA AP	<mark>1</mark> 1%	يال ₋ کِمْ	299	SA AP	<mark>1</mark> 4%	*	r i z	
Don't know / prefer not to say	5%	7%	ا ا-با	6%	چالے آپ-آ	5%	جالے }-ن	6%	چالے پان	\$\frac{1}{2}	

By Region Doctors



Significantly higher/ lower than all doctors

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%)

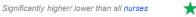
, (Sear. 1878)										
	Nurses n= 143	North America		South America n= 10	Europe n= 35		Asia Pacific n= 40		Middle East & Africa	Back to home
Stay in healthcare but changing role or location	56%	49%	7/3	}-1	62%	ر آمار	62%	5/2	ť	
Move to a non-healthcare related job	<mark>16</mark> %	7%	N	ti	10%	T.	<mark>22</mark> %	T.	ជ	
Take a leave of absence/ sabbatical	1%	0%	W	Too few responses	0%	lw/	0%	W	Too few responses	
Retire	<mark>19</mark> %	39%	★ AP	\ \ \ \	19%	70	9%	7.7	\(\frac{1}{2}\)	
Don't know / prefer not to say	8%	5%	<u>}-;</u>	};	9%	چار پاستا	7%	75	5	

Base: n= 143

By Region

Clinicians

Doctor



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	ec2 ₂ 0	China n= 79	೦೭೭ ಬ	India	862 ₁ 3	Japan n= 38	UK n= 45	ငေသုပ်	Brazil n= 29
Stay in healthcare but changing role or location	58%	53%	T.	73%	★ U		UK			7/3	\rangle \frac{1}{2}
Move to a non-healthcare related job	<mark>1</mark> 3%	9%	T.J	9%	ħ	22%	★ CH US	10% 5	3%	7/3	ń
Take a leave of absence/ sabbatical	3%	2%)Al	0%	14	5%	L.	0% %	8%	L CH	Too few responses
Retire	<mark>20</mark> %	30%	★ CH	IN 7%	*	7%	*	9% ∵	35%	★ CH	<u>1</u> . Σλ7
Don't know / prefer not to say	7%	6%		<mark>1</mark> 1%	를 II	1%	*	2%	7%	چالے آب	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\

By Key Country





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	862,0	China n= 73	862), G	India n= 63	862, 3	Japan n= 33	UK n= 32		razil 22
Stay in healthcare but changing role or location	60%	50%	j.j.	67%	J U	65%	U S	^K 79% ★	JS JK 25	*	رائے اب
Move to a non-healthcare related job	9%	<mark>1</mark> 1%	Å	<mark>1</mark> 4%	ú	10%	ħ	3% 55	6%	ħ	ħ
Take a leave of absence/ sabbatical	6%	3%	W	0%	*	10%	-t C	H 0% 53	16%	★ US CH JP	1 N
Retire	21%	30%	√ CH	^{IN} 11%	5.7	14%	7.7	15%	47%	★ CH IN JP	7/1
Don't know / prefer not to say	5%	6%		8%	75	2%	\$7	3% ☆	6%	ţ'i	}-J

Only asked to those who are considering leaving.

Base: n= 492

By Key Country





Nurses



Significantly higher/ lower than all doctors

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	86E), @	China n= 6	India n= 9	462), 3		UK n= 13	Brazil n= 7
56%	56%	جار آم)			J. J.	14	5/1-5	
16%	8%	ń	t		13	7.4	ដែ	☆
1%	0%	A.	7. 4		Too few resp	oonses	- 1 2 of	-4- 2×1
19%	319	7L 77	آبداً آبداً) }	- JI- -	7,4	7.7
8%	6%	75	<u> </u>		7.7	÷	}J	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\
	n= 143 56% 16% 1%	n= 143	n= 143	n= 143	n= 143	n= 143	n= 143	n= 143

Only asked to those who are considering leaving.

Base: n= 143

By Key Country

Clinicians Doctors





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	0.00
High patient volumes reduce time available for each patient	74%	76%	73%	بالـ الـــــــــــــــــــــــــــــــــ
Have to complete too much administration (e.g. updating health records)	73%	75%	70%	J-1
Increasing complexity of patients' medical needs	57%	55%	58%	1/3
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	<mark>38%</mark>	41%	<u>35</u> %	7.n/
Insufficient time to ask all necessary diagnostic questions	<mark>35%</mark>	31 ⁹	38 %	Ş.J
Reimbursement models mean less time with patients	<mark>26</mark> %	28	<u>.</u> 24	T.

Overa	all
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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	<mark>25</mark> %	20%	30°	DR ★
Patients have numerous questions	<mark>22</mark> %	<mark>24</mark> %	19 %	7.7
Other (please specify)	9%	3%	<mark>★</mark> 16%	★ DR
I am expected to manage one health condition at a time	8%	7%	9%	7h.
Don't know / prefer not to say	1%	0%	1%	Ş.J

	Overall	
Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians



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	South America	Europe n= 167	Asia Pacific n= 252	Middle East & Africa
High patient volumes reduce time available for each patient	74%	72% ∜	64% sp	75% ೃ∵	76% √	sa 84% ∰
Have to complete too much administration (e.g. updating health records)	73%	79% (**) MA	76% 5 MA	70% Sej	74% ^M	54% ★
Increasing complexity of patients' medical needs	57%	71% ★ ^{SA EU}	51% ☆	51%	57% ☆	63%
Not enough time to explain complex medical conditions clearly	46%	56% 🗓 EU	44% ¹	40% JA	47%	52%
I need to spend time managing patients' misconceptions based on false or misleading health information	38%	51% ★ EU	38% JJ	33%	37% ⁵	38% [%]
Insufficient time to ask all necessary diagnostic questions	35%	42% SA	22% S	34%	35%	38% ^{5.5}
Reimbursement models mean less time with patients	269	44% ** SA EU AP MA	<mark>22</mark> %	22 July MA	27% M	★

By Region

Clinicians

Doctor





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)



2/2	Clinicians n= 607	North A	America	South A	America	Europ n= 167) e	Asia P	acific	Middle Ea	ast & Africa Ba
are	25%	<mark>21</mark> %	رام آخا	14%		33%	SA NA AP	<mark>22</mark> %	رار آبرا	35%	SA
	22%	34%	★ EU	<mark>21</mark> %	t)	17%	147	<mark>22</mark> %	T)	<mark>20</mark> %	1,7
	9%	10%	_LMA	6%	¥	17%	★ AP MA	5%	14	0%	*
condition	8%	9%	الم أما	2%	7.1	10%	J.	7%	7/4	<mark>1</mark> 3%	<u> </u>
	1%	1%	رالي إ-،آ	0%	}-J	2%	چالے پا-نا	0%	چا <u>۔</u> آپ	0%	Ş-J
	are	2/2 n= 607 are 25% 22% 9% condition 8%	2/2 n= 607 n= 93 are 25% 21% 22% 349 9% 10% condition 8% 9%	2/2 n= 607 n= 93 are	2/2 n= 607 n= 93 n= 50 are	2/2 n= 607 n= 93 n= 50	2/2 n= 607 n= 93 n= 50 n= 167 are	2/2 n= 607 n= 93 n= 50 n= 167 are	2/2 n= 607 n= 93 n= 50 n= 167 n= 252 are 25% 21%	2/2 n= 607 n= 93 n= 50 n= 167 n= 252 are 25% 21% ☆ 14% ☆ 339 ☆ AP 22% ☆ 22% 349 ★ AP 21% ☆ 17% ☆ 22% ☆ 9% 10% ☆ MA 6% ☆ 17% ★AP MA 5% ☆ condition 8% 9% ☆ 2% ☆ 10% ☆ 7% ☆	2/2 n= 607 n= 93 n= 50 n= 167 n= 252 n= 43 are

By Region

Clinicians





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)



1/2	Doctors n= 483	North America	South America n= 39	Europe n= 136	Asia Pacific n= 212	Middle East & Africa
High patient volumes reduce time available for each patient	76%	70% _{\(\sigma\)}	64% ₅ 5	79% √	77%	79% ç
Have to complete too much administration (e.g. updating health records)	75%	87% ★	80% 5°-j	81% ♂	70% 55 M	⁴ 39% ★
Increasing complexity of patients' medical needs	55%	66% ∜	47%	57% ☆	51% 🖒	58% ☆
Not enough time to explain complex medical conditions clearly	54%	56% ¹	51% ¹	48% Jaj	58%	55% ਹੈ
I need to spend time managing patients' misconceptions based on false or misleading health information	41%	61% ★ EU AP	52% EU	32 % *	<mark>39%</mark> 55	45%
Insufficient time to ask all necessary diagnostic questions	319	39%	<mark>25</mark> % 🕏	279	34% 5	27 % 55
Reimbursement models mean less time with patients	289	62% sa eu	26 % 5 MA	24 SA MA	24% M	★

By Region

Clinicians Doctors Nurses



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)



2/2	Doctors n= 483	North A	merica	South A	America	Europ n= 136	e	Asia P	acific	Middle Eas	st & Africa	Back hom		
	24%	39%	SA EU ★AP MA	15%	را _ت ادنا	21%	\ \-1	<mark>26</mark> %		<mark>1</mark> 2%	راام آب			
s are	20%	18%	ħ	10%		27%	SA AP	17%	1/3	30%	SA SA			
condition	7%	5%	W	5%	W	10%	<u></u>	7%	W	6%	14			
	3%	8%	جار AP	3%	7.1	3%	-/L- }(2%	5.7	0%	ll			
	0%	2%	<u>ي.</u> اي-ر	0%	اِــاً آ-با	0%	Ĭ- <u>?</u>	1%	7.7	0%	Ş-;;			
	s are	2/2 n= 483 24% s are 20% condition 7% 3%	2/2 n= 483 n= 61 24% 39% s are 20% 18% condition 7% 5% 3% 8%	2/2 n= 483 n= 61 24% 39% ♣AP MA SA EU AP MA 18% 5% 3% 3% 3% 3% 3% AP	2/2 n= 483 n= 61 n= 39 24% 39% ★AP MA 15% s are 20% 18% 10% condition 7% 5% 5% 3% 8% 3% AP 3%	2/2 n= 483 n= 61 n= 39 24% 39% ★AP MA 15% ☆ s are 20% 18% ☆ 10% ☆ condition 7% 5% ☆ 5% ☆ 3% 8% ♣AP AP 3% ❖	2/2 n= 483 n= 61 n= 39 n= 136 24% 39% ★AP MA 15% ☆ 21% s are 20% 18% ☆ 10% ☆ 27% condition 7% 5% ☆ 5% ☆ 10% 3% 8% ☆ AP 3% ☆ 3%	2/2 n= 483 n= 61 n= 39 n= 136 136 sare 24% 39% ★AP MA 15% ₺ 21% ₺ 38A				2/2 n= 483		

By Region

Doctors





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	South America	Europe n= 31	Asia Pacific n= 40	Middle East & Africa
High patient volumes reduce time available for each patient	73%	74% s	يال يُريْ	72% 5	74%	77
Have to complete too much administration (e.g. updating health records)	70%	71% \$	ر اس اسا	60%	80% s	5-7
Increasing complexity of patients' medical needs	58%	75% ☆ EU	7.7	45% t	64% t	
Insufficient time to ask all necessary diagnostic questions	38%	45% ¹	1 _N	40%	37% JA	-t / √
Not enough time to explain complex medical conditions clearly	38%	56% S AP	- N	33%	32%	7.7
I need to spend time managing patients' misconceptions based on false or misleading health information	35%	42%	ţ ⁵	33%	36% ⁵	Ž.
Digital tools to help diagnose patients are inadequate	30%	23	-1-1-5 2	38%	29%	ដ

By Region





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)



										_
2/2	Nurses n= 124	North A	America	South America n= 11	Europ n= 31) e	Asia P	acific	Middle East & Africa	Back hon
ne with	24	27 ⁰	J.J	ر الراح احا	20%	Jr.J	<mark>31%</mark>		r i	-
	19%	299	T.	14	13%	Å	<mark>17</mark> %	7.7	ដ	
	16%	<mark>1</mark> 1%	W	Too few responses	29%	AP	9%	147	Too few responses	
condition	9%	<mark>1</mark> 2%	Jai)	10%	ال أما	8%	7.4	7.d-	
	1%	0%	J-7	کال _ت	4%	چالے پا۔نا	0%	}-j	75	
	2/2 me with condition	2/2 n= 124 me with 24 19% 16% condition 9%	2/2 n= 124 n= 32 me with 24 279 19% 299 16% 11% condition 9% 12%	2/2 n= 124 n= 32 me with 24 279 to 16% 11% to 12% to 12%	2/2 n= 124 n= 32 n= 11 me with 24 27	2/2 n= 124 n= 32 n= 11 n= 31 me with 24 27	2/2 n= 124 n= 32 n= 11 n= 31 me with 24 27	2/2 n= 124 n= 32 n= 11 n= 31 n= 40 me with 24 27	2/2 n= 124 n= 32 n= 11 n= 31 n= 40 n= 40 me with 24 27	2/2 n= 124 n= 32 n= 11 n= 31 n= 40 n= 10 n= 10 me with 24 27

By Region



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)



												home
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% j	81%	JP J BR	84%	JP BR	66%	ĬŢ.	94%	₩ JP BR	56%	*
Have to complete too much administration (e.g. updating health records)	73%	82% _{//}	^{IN} 71%)-J	57%	*	89%	CH ★ IN	76%	<u></u>	74%	ر آما
Increasing complexity of patients' medical needs	57%	66%	^{IN} 57%	IN	37%	*	65%	IN	77%	★ CH	64%	IN
Not enough time to explain complex medical conditions clearly	46%	58% ★	JP 51%] _A	37%	12	41%	l.	49%	14	44%	las
I need to spend time managing patients' misconceptions based on false or misleading health information	38%	53% ★	37%	7.7	37%	7.7	41%	7.V	41%	7.7	58%	★ CH
Insufficient time to ask all necessary diagnostic questions	35%	44%	1N JP BR	IN JP BR		*	22	*	39%	J.J IN	18	<u> </u>
Reimbursement models mean less time with patients	<mark>26</mark> %	50%	CH IN UK BR	77	18%	ជ	39%	★ IN UK	1	*	26 ⁹	T.

By Key Country



Doct







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%	7.7	41%	★ US II ★ J	13%	*	8%	*	38%	US IN JP	19%	آما
Patients have numerous questions	22%	33%	*	JP 34%	★ 』	10%	*	13%	74	18%		22%	ħ
Other (please specify)	9%	11%	W	CH 1%	*	4%	TAT	1%	*	13%	The CH JP	10%	L CH
I am expected to manage one health condition at a time	8%	4%	7.7	9%	7.7	1%	1.7	4%		23%	★US CH IN JP	4%	7.7
Don't know / prefer not to say	1%	1%		0%	Ji	1%	اِ۔ آ۔آ	0%	ń	0%	DK.	0%	چالے آپ-آ

By Key Country

Clinicians

Doctors

Nurse:





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)



											home
1/2	Doctors n= 483	USA n= 56	China n= 63	062 ಟ	India n= 53	662), G	Japan n= 59	UK n= 29	0EZ, Ú	Brazil n= 26	0620,00
High patient volumes reduce time available for each patient	76%	71% 5	79%	17.	79%	0 1	69% ₅		7.		7.7
Have to complete too much administration (e.g. updating health records)	75%	91% F	75%	J. J	58%	*	81%	IN	- الرح أ- أ		7/3
Increasing complexity of patients' medical needs	55%	63% ∜	62%	Ţ.Ĵ	^{IN} 34%	*	54%	IN	√ Too few	responses	Ü
Not enough time to explain complex medical conditions clearly	54%	54%	63%	L.	47%	The state of the s	49%		14	·	W
I need to spend time managing patients' misconceptions based on false or misleading health information	41%	61% ★ ^{C+}	40%	7.7	34%	7~1	42% Jul		-/L }.s./		7/1
Insufficient time to ask all necessary diagnostic questions	31%	39% ₺	43%	Ž-J	IN 25%	J-1	24 55		چ ^{را} لے گا-نا		
Reimbursement models mean less time with patients	289	64% * ch	32%	T.	ın 9%	*	319	IN	7		Ť

By Key Country

Doctors





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)



2/2	Doctors n= 483	USA n= 56	862), CD	China n= 63	ocaj ci	India n= 53	8CD ₁ .0	Japan n= 59	062) (5	UK n= 29	Brazil n= 26	6 G.D., CI
Patients have numerous questions	24	38%	*	^{IN} 35%	ST.	13%	77	22	IN.	5 ⁴ 7		Z
Digital tools to help diagnose patients are inadequate	<mark>20</mark> %	16%	t	<mark>24</mark> %	J. JF	17%	147	7%	*	Ŕ		143
I am expected to manage one health condition at a time	7%	2%	14	<mark>1</mark> 4%	US IN	2%	14	0%	*	Too few _{\(\text{res}\(\text{res}\)}	onses	W
Other (please specify)	3%	9%	*	2%	5.7	6%	7.7	2%	الم أماً	7.7		7.7
Don't know / prefer not to say	0%	2%	7-7	0%	<u>}-7</u>	2%	}-J	0%	ń	}-j		J-J

By Key Country



Doctors





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%		يال ياسا		Ţ)، (ا	:).J]./]./		7.7
Have to complete too much administration (e.g. updating health records)	70%		7.7			الح آخا		[-]				5/3
Increasing complexity of patients' medical needs	58%		7.3		Ú	∏ Too few r	esponses	Ť		t		Ü
Insufficient time to ask all necessary diagnostic questions	38%		Two		W	_1_ 1 _A /		Jaj		14		14
Not enough time to explain complex medical conditions clearly	38%		Yal		1.7	7.7		5.7		5.7		7/1
I need to spend time managing patients' misconceptions based on false or misleading health information	35%		<u> </u>		Ş15	<u>}.</u> .		55		جالے إ-نا		J-3
Digital tools to help diagnose patients are inadequate	30%		14		Ü			Z		T.		Ť.

By Key Country





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	662), D	China n= 6	India n= 2	062), 3	Japan n= 10	UK n= 7	Brazil n= 6	
Reimbursement models mean less time with patients	24		7.7	الح آخراً		ħ	J.	7 ¹ 7	~ ¹ − 1	
Patients have numerous questions	19		Ñ). [-]		Ü	7.7]]}		
Other (please specify)	<mark>1</mark> 6%		las	1_ 3_d		w respon:	ses	_1_)_{_/	1 _A	
I am expected to manage one health condition at a time	9%		7.7).v.		7.7	ح ^{ال} أسماً	7~7	1/7	
Don't know / prefer not to say	1%		<u> ح</u> الح	يا. ا		<u> </u>	ψ̈́	\.\	}-J	

By Key Country







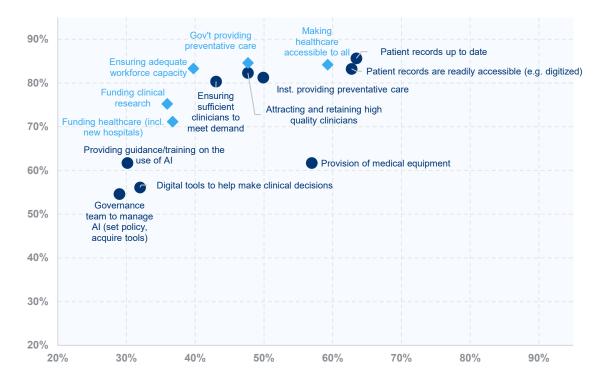


Clinicians' views of priorities and performance

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







% indicating good performance (very good / good)

Clinicians

Overall

Institution

National Governments

% prioritizing

(very high / priority)

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)

Base: n= 2178



Priority should be assigned by my institution

%Low Priority/High Priority	Clinicians n= 2130 - 2178	Doctors n= 1728 - 1759	Nurses n= 402 - 422	000,00
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%	رار ا- آ
Attracting and retaining high quality clinicians	6% 82%	7% 80%	4% 85%	Ü
Providing preventative care	6% 81%	8% 75%	5% 88%	*
Ensuring sufficient clinicians to meet patient demand	7% 80%	8% 77%	6% 83%	5.7
Providing guidance/training on the use of Al artificial intelligence) tools to clinicians	18 <mark>% 62%</mark>	17 <mark>%</mark> 61%	19% 63%	7,5
Providing the most appropriate medical equipment to support clinicians and patients	18 <mark>% 62%</mark>	17 <mark>%</mark> 61%	19 <mark>% 63%</mark>	

Overall



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)

Base: n= 2178



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 <mark>% 56%</mark>	17 <mark>%</mark> 57%	di.	15% <mark>55%</mark>	7.
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)		19 <mark>% 55%</mark>	18% 55%	Å	21% 54%	

Overall

Clinicians Doctors Nurses

Significantly higher/ lower than all clinicians

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% ¹	6% 92% * NA	4% 87% ³ 3	4% 84%	4% 86% ⁵
Ensuring patient records are readily accessible (e.g. digitized)	5% 83%	6% 79% ⁵	7% 88% NA	4% 85% MA	5% 84%	11% 75% *
Attracting and retaining high quality clinicians	6% 82%	3% 89% ★ AP MA	7% 83% ^{13 MA}	6% 88% AP MA	5% 80%	^{MA} 12% 71% ★
Providing preventative care	6% 81%	5% 87% * AP	6% 89% AP MA	6% 83%	6% <mark>78%</mark>	9% 81%
Ensuring sufficient clinicians to meet patient demand	7% 80%	4% 88% * AP MA	8% 85% AP	7% 82%	7% <mark>77%</mark>	8% 79%
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	18 <mark>% 62%</mark>	16% 66% SD EU	15% 75% AP MA	20 <mark>%</mark> 59%	19 <mark>% 60%</mark>	19 <mark>% 62%</mark>
Providing the most appropriate medical equipment to support clinicians and patients	18 <mark>% 62%</mark>	16% 66% EU	15% 75% ** EU	20 <mark>%</mark> 59%	19 <mark>% 60%</mark>	19 <mark>% 62%</mark>

Base: 2178

By Region

Clinicians

Doctor



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	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 <mark>%56%</mark>	18 <mark>% 60%</mark>	14% 68% EU	21% <mark>53%</mark>	14% <mark>55%</mark>	16 <mark>%</mark> 56%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	19 <mark>%</mark> 55%	14% 60%	17% <mark>59%</mark>	19% <mark>53%</mark>	21 <mark>%53%</mark>	22%57%

Base: 2178

By Region





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)



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% Sur AP	5% 78%	6% 86%
Ensuring patient records are readily accessible (e.g. digitized)	6% 81%	5% 75%	10% 83%	4% 84% AP	6% 79%	8% 85% NA
Attracting and retaining high quality clinicians	7% 80%	2% 88% * AP MA	10% 82% [‡]	7% 84% AP	8% <mark>76%</mark>	8% 77% [‡]
Ensuring sufficient clinicians to meet patient demand	8% 77%	3% 87% * SA	12% 74%	7% 80% AP	8% 75%	8% 81%
Providing preventative care	8% 75%	6% 80% July AP	9% 82%	7% 76%	9% <mark>71%</mark>	★ EU AP
Providing guidance/training on the use of Al (artificial intelligence) tools to clinicians	17% 61%	18 <mark>% 61%</mark>	21% <mark>59%</mark>	20 <mark>%57%</mark>	15 <mark>% 62%</mark>	21 <mark>%</mark> 58%
Providing the most appropriate medical equipment to support clinicians and patients	17% 61%	18 <mark>% 61%</mark>	21 <mark>% 59%</mark>	20 <mark>%</mark> 57%	15 <mark>% 62%</mark>	21 <mark>%</mark> 58%

Base: 1759

By Region

Clinicians Doctors Nurses

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
Providing access to digital tools (including AI) that help me make clinical decisions	17% 57%	21 <mark>%</mark> 56%	22% <mark>58%</mark>	21%51%	14% <mark>61%</mark>	19% 55%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	18% 55%	14% <mark>58%</mark>	24 <mark>%49%</mark>	19 <mark>%53%</mark>	17 <mark>%56%</mark>	ੀ 18% <mark>57%</mark>

Base: 1759

By Region

Clinicians

Doctors

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% ¹	3% 97%	4% 91% ¹	3% 90%	3% 86% ¹
Providing preventative care	5% 88%	3% 93% MA	3% 97% Fr MA	5% 89% MA	4% 86%	13% 74%
Ensuring patient records are readily accessible (e.g. digitized)	4% 86%	6% 84% ^{† MA}	3% 94% AMA	4% 85% ^{† MA}	3% 88%	^{MA} 14% 65% ★
Attracting and retaining high quality clinicians	4% 85%	4% 90% ¹ MA	3% 84% ¹	5% 92% ^{⅓, MA}	2% 83%	16% 65%
Ensuring sufficient clinicians to meet patient demand	6% 83%	4% 89%	3% 97% AP MA	7% 85%	6% 80%	8% 76%
Providing guidance/training on the use of Al (artificial intelligence) tools to clinicians	19 <mark>% 63%</mark>	14% 72% AP	9% 91% AP MA	20 <mark>%</mark> 60%	23 <mark>%57%</mark>	16 <mark>%</mark> 66%
Providing the most appropriate medical equipment to support clinicians and patients	19 <mark>% 63%</mark>	14 <mark>% 72%</mark>	9% 91% AP MA	20 <mark>%</mark> 60%	23 <mark>%</mark> 57%	16 <mark>% 66%</mark>

By Region

Clinicians Doctors Nurses

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	Nurses n= 402 - 422	North America n= 85 - 92	South America n= 31 - 32	Europe n= 77 - 81	(C), (I)	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% <mark>55%</mark>	15% <mark>64%</mark>	6% 78% * EU	22%54%).i	15 <mark>%49%</mark>	ੌ 14% <mark>57%</mark>
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	21 <mark>%</mark> 54%	15% <mark>62%</mark>	10% 70%	18%53%	J-1	25 <mark>%50%</mark>	ੈ 26 <mark>%58%</mark>

By Region

Clinicians

Doctor

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)



Priority should be assigned by my institution



%Low Priority/High Priority	Clinicians /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%	55 6% 86°	6 3% 87% st	2% 91% H	4% 94% JI
Ensuring patient records are readily access (e.g. digitized)	ible 5% 83%	6% 78%	★ 4% 84%	US 8% 83%	6 ₄ 3% 85% ₄	2% 87% US	5% 91% Us
Attracting and retaining high quality cliniciar	ns 6% 82%	3% 88%	IN JP ★ 5% 83%	IN JP JZ 5% 74%	★ 3% 76% ★	2% 95% P	3% 89% ^{II}
Providing preventative care	6% 81%	5% 86%	сн 1 6% 74%	★ 7% 849	сн б ू 5% 81% ू	6% 84% s	3% 93% U
Ensuring sufficient clinicians to meet patien demand	t 7% 80%	4% 88%	+ 1N ★ 7% 74%	± 10% 76%	5k 3% 83% 5k	US CH	
Providing guidance/training on the use of A (artificial intelligence) tools to clinicians	l 18 <mark>% 62%</mark>	16% 65%	IN UK 18% 66%	IN IP UK \$7 25 <mark>%45</mark> %	IN ★ 15%57% 5	21 <mark>%</mark> 51%	IN CI IS JI 14% 77% UI
Providing the most appropriate medical equipment to support clinicians and patients	5 18 <mark>% 62%</mark>	16% 65%	IN UK 18% 66%	IN I	IN ★ 15%57%	21%51%	in c 14% 77% U

Base: 2178

By Key Country

Clinicians Doctors Nurses



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)





Priority should be assigned by my institution

%Low Priority/High Priority	Clinicians 2/2 n= 2130 - 2178	USA n= 231 - 245		China India n= 469 - 481 n= 274 - 290			Japan = 164 - 168	UK n= 107 - 109	Brazil n= 106 - 108		
Providing access to digital tools (including that help me make clinical decisions	g AI) 16 <mark>% 56%</mark>	19 <mark>%</mark> 58%	ابات 1	13% <mark>53%</mark>	يال يار	20 <mark>%</mark> 50%	*	6% 67% IN UK	15%53%).ú	12% 69% IN CH US US UK
Ensuring a governance team is in place t manage AI (artificial intelligence) (set pol acquire tools)		15% 58%	IN S-F	18 <mark>% 54%</mark>	IN	30% <mark>45</mark> %	*	16% 60%	15%52%	T/3	14% 65% ★

Base: 2178

By Key Country





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 /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	сн % 4% 86% г.	91%	± 4% 93% US
Ensuring patient records are readily access (e.g. digitized)	ible 6% 81%	6% 74%	5% 76%	يار 7% الم	% _{/-} 6% 82% _{/-}	1% 87%	H 5% 90% US
Attracting and retaining high quality clinician	ns 7% 80%	2% 88%	HIN JP ★ 8% 76%	^{JP} 10% 799	JP 65% √ 3	1% 94%	2% 92% JE
Ensuring sufficient clinicians to meet patien demand	t 8% 77%	4% 88%	9% 68%	★ 12% 79%	CH CH 79% 1,1 1,1 1,1 1,1 1,1 1,1 1,1 1,1 1,1 1,	1% 92%	6% 81%
Providing preventative care	8% 75%	7% 80%	сн 57 11% 63%	★ 8% 79%	CH 7% 72% 5%	7 9% 75%	H INCH 2% 90% UF
Providing guidance/training on the use of A (artificial intelligence) tools to clinicians	l 17 <mark>%</mark> 61%	17% 63%	\$ 15 <mark>% 61%</mark>	√ 17 <mark>%</mark> 60%	কি <mark>8%</mark> 67% ক	23 <mark>%53%</mark>	√ 14% 68%
Providing the most appropriate medical equipment to support clinicians and patients	5 17% <mark>61%</mark>	17% 63%	¹ √ 15 <mark>% 61%</mark>	ւն 17 <mark>%</mark> 60%	\$ 8 <mark>67%</mark> \$	23%53%	¹ 14% 68%

Base: 1759

By Key Country





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 2/2 n= 1728 - 1759	USA n= 151 - 158		China = 411 - 421		ndia = 242 - 255		lapan = 132 - 136	UK n= 76 - 78		Brazil n= 83 - 85	0620,00
Providing access to digital tools (including that help me make clinical decisions	g AI) 17% <mark>57%</mark>	21%57%	17	15% <mark>55%</mark>	17	13 <mark>%</mark> 60%	7.7	5% 84% CH UK BR	17%51%	7.5	15% 64%	بال <u>.</u> کارن
Ensuring a governance team is in place to manage AI (artificial intelligence) (set poli acquire tools)		13 <mark>%</mark> 60%	7/3	18% <mark>51%</mark>	T.	17 <mark>%</mark> 61%	CH	10% 71% CH UK BF	13%53%	F.	19% 51%	7/3

Base: 1759

By Key Country







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)



Priority should be assigned by my institution



%Low Priority/High Priority	Nurses /2 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	% <u>J.</u> 3% 88% J.	3% 90%	ŽIŽ ŽIŽ
Providing preventative care	5% 88%	3% 92%	2% 85%	6% 89	% _닭 3% 91% _닭	3% 94%	Ti T
Ensuring patient records are readily access (e.g. digitized)	ible 4% 86%	7% 81%	2% 92%	☆ 9% 85	% _{} 88% _{	3% 87%	tanger de de la faction de la
Attracting and retaining high quality cliniciar	ns 4% 85%	5% 88%	IN 2% 90%	IN 69%	★ 3% 87%	3% 97%	N 1√ 1 _A
Ensuring sufficient clinicians to meet patient demand	t 6% 83%	5% 87%	5% 80%	5 ¹ 9% 74%	6 5 3% 88% 5	3% 97%	H N *
Providing guidance/training on the use of Al (artificial intelligence) tools to clinicians	19 <mark>% 63%</mark>	16 <mark>% 67%</mark>	IN JP 22% 70%	IN UK 32% 29%	★ 22%47%	7 19% <mark>48%</mark>	\$ ¹ 7 \$ ¹
Providing the most appropriate medical equipment to support clinicians and patients	5 19 <mark>% 63%</mark>	16% <mark>67%</mark>	IN JP 22 <mark>% 70%</mark>	IN UK 32%29%	★ 22 <mark>%47% </mark>	19 <mark>%</mark> 48%	t t

By Key Country



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)



Back to

Priority should be assigned by my institution

%Low Priority/High Priority	Nurses 2/2 n= 402 - 422	USA n= 80 - 87	n= 80 - 87			India n= 32 - 35		Japan n= 31 - 32		UK n= 31 - 31	Brazil n= 23 - 23	0EZ, 0
Providing access to digital tools (including that help me make clinical decisions	g AI) 15 <mark>% 55%</mark>	17%58%).	12 <mark>%51%</mark>	7.	27% <mark>39</mark> %	7.7	6% 50%	17	13%55%	Too few respo	onses
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policacquire tools)		18%56%	IN L	19% <mark>57%</mark>	IN 5-5	44% <mark>28</mark> %	*	23 <mark>%</mark> 48%	Ţ.	16%52%	- JeJ	7.J

By Key Country







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	062(67)
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%	W DR
Funding clinical research	8% 75%	11% 76%	5% 74%	5.7
Funding healthcare (including new hospitals)	8% 71%	9% 74%	× NU 6% 68%	75

	Overall	
no	Doctoro	Muraga

Base: n= 2167 - 2186

Significantly higher/ lower than all clinicians

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% F	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% 1.4 MA	7% 85% MA	7% 84%	¹ MA 12% 73% ★
Funding clinical research	8% 75%	9% 78%	12% 80%	8% 75% ^{5.7}	7% <mark>74%</mark>	14% 76%
Funding healthcare (including new hospitals)	8% 71%	10% 70%	14% 74%	8% 76% * AP	6% 69%	7 14 <mark>% 72</mark> %

Base: n= 2167 - 2186

By Region

Clinicians

Doctor

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% <mark>79%</mark>	14 <mark>% 75%</mark>
Making healthcare accessible to all	8% 80%	10% 81%	9% 85% AP	6% 85% * AP	8% <mark>76%</mark>	7% 84%
Providing preventative care	8% 79%	7% 83% AP	12% 81%	6% 83% AP	8% <mark>75%</mark>	6% 86% AP
Funding clinical research	11% 76%	9% 81% ⁵	18 <mark>% 79%</mark>	10% 75%	11% 76%	17 <mark>% 72%</mark>
Funding healthcare (including new hospitals)	9% 74%	10% 72%	15% 74%	8% 77%	9% <mark>73%</mark>	14 <mark>% 74%</mark>

Base: n= 1748 - 1764

By Region

Clinicians Doctors

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% F	8% 88% ⁵	2% 93%	8% 82%
Making healthcare accessible to all	4% 88%	8% 86% ¹	6% 91%	5% 85% ¹	1% 90%	5% 87%
Ensuring adequate workforce capacity	7% 86%	10% 80%	6% 87% 1 ₁	6% 88% ^{1√ MA}	6% 88%	11% 71%
Funding clinical research	5% 74%	10% 76%	6% 81%	6% 76%	3% <mark>71%</mark>	11% 81%
Funding healthcare (including new hospitals)	6% 68%	11% 69%	13% <mark>75%</mark>	7% 75%	2% <mark>64%</mark>	14 <mark>% 70%</mark>

Base: n= 415 - 423

By Region

Clinicians Doctors Nurses

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



,	, ,	9					
%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%	ქე 6% 87% <mark>ე</mark>	1% 87%	7% 86%	ې <mark>7% 88%</mark> چ
Making healthcare accessible to all	6% 84%	10% 82%	☆ 4% 82%	्र [्] र 4% 87% न	5% 80% √	5% 94%	H 5% 90% CH
Ensuring adequate workforce capacity	8% 83%	9% 84%	7% 81%	9% 81% 7	∑ 0% 97% N	5% 92%	8% 86%
Funding clinical research	8% 75%	10% 77%	JP 6% 71%	5.7 9% 77% 5	2% 68%	8% 73%	が 8% 85% CH JP UK
Funding healthcare (including new hospitals)	8% 71%	9% 71%	JR 4% 67%	71% 71% 5	3% 56%	7% 83% S	13% 72% JP

Base: n= 2167 - 2186

By Key Country



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%	сн 8% 73%	★ 9% 839	CH 1% 94%	4% 91%	° + 7% 90% 4
Making healthcare accessible to all	8% 80%	10% 81%	CH JP, 9% 71%	★ 6% 88°	сн 8% 66%	★ 3% 94%	он Ј р. 1% 94% <mark>Јр.</mark>
Providing preventative care	8% 79%	7% 86%	° 9% 67%	★ 9% 839	% CH 3% 77% CH	8% 86%	CH 90% JR
Funding clinical research	11% 76%	8% 82%	CH 11% 73%	√ 13 <mark>% 8</mark> 0%	6 CH 1% 82% CF	9% 74%	7% 92% us uk
Funding healthcare (including new hospitals)	9% 74%	9% 72%	5 9% 70%	ರ 78 %	7% 68%	4% 86%	CH. 7% 81% CH.

Base: n= 1748 - 1764

By Key Country



Significantly higher/ lower than all doctors

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%)





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% _{}	<u>, </u>
Making healthcare accessible to all	4% 88%	9% 84%	0% 93% ₁	3% 85% 🖔	3% 94%	6% 94% 🔥	ī.
Ensuring adequate workforce capacity	7% 86%	12% 80% 🐰	5% 88% 🖫	9% 80% 1	100%N ★	6% 94%	Too few responses
Funding clinical research	5% 74%	11% 72% 🕏	2% <mark>70%</mark> 55	6% 74 % \$	3% <mark>55% ★</mark>	6% 71% 🕏	7.
Funding healthcare (including new hospitals)	6% 68%	10% 70% JR	0% <mark>63%</mark> 5	6% 63%	45% 🛨	10% 81% JP	7.

high priority and the midpoint 3 is neutral.

Base: n= 415 - 423

"Don't know / prefer not to say" answers are excluded from the responses.

By Key Country



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%), Al training (30%) or Al governance (29%). Nurses are generally more positive than doctors (1/2)





Performance by my institution

%Very Poor / Poor & 1/2 Very Good / Good	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 <mark>% 63%</mark>	23 <mark>%</mark> 56%	*	15% 70%	*
Providing the most appropriate medical equipment to support clinicians and patients	22% 57%	25%49%	*	19% 65%	*
Providing preventative care	23 <mark>% 50%</mark>	27% 41%	*	20% 59%	*
Attracting and retaining high quality clinicians	30% <mark>48%</mark>	3 <mark>6%</mark> 39%	*	24 <mark>% 56%</mark>	*
Ensuring sufficient clinicians to meet patient demand	33% <mark>43%</mark>	38% <mark>35</mark> 9	*	28% <mark>51%</mark>	*
Providing access to digital tools (including AI) hat help me make clinical decisions	3 <mark>9% 32</mark> %	44% <mark>2</mark> 8	*	34% <mark>36</mark> %	

Overall



Doctors



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%), Al training (30%) or Al governance (29%). Nurses are generally more positive than doctors (2/2)





Performance by my institution

%Very Poor / Poor		Clinicians	ians Doctors		Nurses		
& Very Good / Good		n= 2091 - 2174	n= 1693 - 1753	000	n= 398 - 421	0ED ED	
Providing guidance/training on the use of Al (artificial intelligence) tools to clinicians		45% <mark>30</mark> %	50% <mark>23</mark> %	*	41% <mark>37</mark> %	*	
Ensuring a governance team is in place to manage Al (artificial intelligence) (set policy, acquire tools)		40% <mark>29</mark> %	45% <mark>25</mark> %	*	35% <mark>33</mark> 9	7.7	



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 <mark>% 63%</mark>	17 <mark>% 64% </mark>	28% <mark>46% ±</mark>	20% 60% SA	12% <mark>68%</mark>	J MA 31% 56%
Ensuring patient records are readily accessible (e.g. digitized)	19% <mark>63%</mark>	15% 67% SA MA	32% <mark>54%</mark>	19 <mark>%</mark> 61%	15 <mark>% 65%</mark>	^{SA} MA 30%53% ★
Providing the most appropriate medical equipment to support clinicians and patients	22 <mark>%57%</mark>	20 <mark>%55%</mark> SA	45% <mark>38</mark> % ★	24%54% SA		asa ^{yma} 36% <mark>45</mark> % ★
Providing preventative care	23 <mark>%50%</mark>	27 %43% *	31% <mark>47%</mark> [♣]	33% <mark>379 </mark>	18 <mark>%56%</mark>	A SA NA SA EU 21% 59%
Attracting and retaining high quality clinicians	30 <mark>%48%</mark>	34%44% SA	50% <mark>34</mark> % ★	38% <mark>389 🛨</mark>		A SA J MA 43%44%
Ensuring sufficient clinicians to meet patient demand	33% <mark>43%</mark>	4 <mark>0%37</mark> 9	51% <mark>33</mark> % ★	39% <mark>34' 🛨</mark>	25 <mark>%49%</mark> ±	A SA NA SA SEU 38% 47%
Providing access to digital tools (including AI) that help me make clinical decisions	3 <mark>9%</mark> 32%	32%34°	51% <mark>28</mark> % 🕏	52% <mark>2</mark> 6 ★	3 <mark>2%</mark> 35% 🕏	EU 50% <mark>34</mark> % ☆

Base: 2174

By Region

Clinicians

Docto

Nurses

Question: Please indicate how well your organisation or national government is performing on the following challenges. Performance... 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.

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)





59

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% <mark>30</mark> %	47% <mark>27</mark> %	65% 28%	59% <mark>1</mark> 9% *	3 <mark>6%</mark> 35%	NA EU 46% 39%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	4 <mark>0%</mark> 29%	EU 41% <mark>30</mark> %	56% <mark>25</mark> %	★ 48% <mark>23</mark> %	3 <mark>4%31</mark> %	$^{^{1}}_{\overline{j}}$ EU $^{^{0}}_{\overline{j}}$ EU 0

Base: 2174

By Region





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)



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 patient records are readily accessible (e.g. digitized)	23% 56%	12% 66% * AP MA	33% <mark>52%</mark> 5	22 <mark>%</mark> 57%	22 <mark>%54%</mark>	31% <mark>53%</mark>
Ensuring patient records are up to date	20% 54%	15% 60% SA	31% <mark>46%</mark>	22 <mark>%</mark> 53%	17 <mark>%55%</mark>	33% 49%
Providing the most appropriate medical equipment to support clinicians and patients	25% 49%	20% 56% SA EU	47% <mark>38</mark> %	27% <mark>46% 🖒</mark>	21 <mark>%51%</mark>	36%45%
Providing preventative care	27% 41%	26%449 EU	35% <mark>39</mark> %	34% <mark>32' ★</mark>	23 <mark>%41%</mark>	22% 58% ** NA S
Attracting and retaining high quality clinicians	36% 399	26%50% ** SA EU	56% <mark>31</mark> %	42% 36°	3 <mark>1%</mark> 39%	43% <mark>46%</mark> s
Ensuring sufficient clinicians to meet patient demand	38% 359	39% <mark>31</mark>	بر 4 7%<mark>32</mark>%	43% <mark>2</mark> 9 ★	3 <mark>3%</mark> 37%	EU ★ NA S 42%45%
Providing access to digital tools (including AI) that help me make clinical decisions	44% <mark>28</mark>	33% <mark>28</mark>	62% <mark>2</mark> 1%	54% <mark>2</mark> ⁴ ★	3 <mark>7%31</mark> %	SA EU 55%30%

Base: 1753

By Region

Clinicians E

Doctors

Nuises

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% <mark>25</mark> %	39% <mark>30</mark> % SA EU	67% <mark>1</mark> 9%	55% <mark>1</mark> 9% *	3 <mark>8%28</mark> %	SA 54% 24%
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	50% <mark>23</mark> %	4 <mark>3%20%</mark>	72% <mark>18</mark> %	68% 1 4%	4 <mark>0%27</mark> %	SA EU 54%34 % EU

Base: 1753

By Region



Doctors

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	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% 55 SA	25% <mark>47% ★</mark>	17% 67% 5 SA	6% 82% ★ ^N	A SA J MA 29% 63%
Ensuring patient records are readily accessible (e.g. digitized)	15% 70%	18 <mark>% 68%</mark> 🕏	31% <mark>56%</mark> \$	16% 66%	9% 76%	SA 29%53% ★
Providing the most appropriate medical equipment to support clinicians and patients	19 <mark>% 65%</mark>	21 <mark>%</mark> 54%	42% <mark>38% *</mark>	20 <mark>% 62%</mark> SA	12% <mark>75%</mark> ★ ^N E	^{4 SA} J MA 37%45% ★
Providing preventative care	20 <mark>% 59%</mark>	28% <mark>42% *</mark>	26% <mark>56%</mark>	32% <mark>41</mark> %	12% <mark>71%</mark> *	NA EU 21% 61%
Attracting and retaining high quality clinicians	24% <mark>56%</mark>	40% <mark>39</mark> 9	42% <mark>38%</mark>	34% <mark>39</mark> 9	11% <mark>72%</mark> *E	4 SA J MA 4 <mark>2%</mark> 42%
Ensuring sufficient clinicians to meet patient demand	28% <mark>51</mark> %	42% <mark>42</mark> %	55% <mark>35</mark> %	35% <mark>389 *</mark>	18 <mark>% 61%</mark> ** N	4 SA EU 34% 50%
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	41%379	50% <mark>32</mark>	58% <mark>39</mark> %	5 1% <mark>2</mark> 5	3 <mark>2%42%</mark>	EU 38% <mark>43%</mark>

Base: 421

By Region

Clinicians Doctors Nurses

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
Providing access to digital tools (including Al that help me make clinical decisions		31% <mark>39%</mark>	4 <mark>0%35</mark> %	49% <mark>31</mark> %	25 <mark>%38%</mark>	46% <mark>38</mark> %
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	3 <mark>5%</mark> 33%	4 <mark>2%30</mark> %	45% <mark>32</mark> %	4 <mark>1%27</mark> %	30 <mark>%35</mark> %	35%41%

Base: 421

By Region









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)



Performance by my institution

Providing access to digital tools (including AI)

that help me make clinical decisions



US IN

JP UK

Base: 2174

By Key Country

Clinicians

Docto



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



Base: 2174

By Key Country







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



	Doctors = 1693 - 1753	USA n= 143 - 156		China n= 412 - 421		ndia n= 249 - 254		apan = 134 - 136		UK n= 70 - 77		Brazil n= 80 - 84	0.000
Ensuring patient records are readily accessible (e.g. digitized)	23 <mark>%</mark> 56%	10% 67%	IN JP	10% 65%	IN JP	3 <mark>4%</mark> 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 B	29% 49%	JP	30% <mark>35</mark> 9	*	21% 59%	JP	28% <mark>48%</mark>	را آما
Providing the most appropriate medical equipment to support clinicians and patients	25 % 49%	18 <mark>%</mark> 58%	JP BR ★	12% 57%	IN JP B	2 <mark>7%</mark> 50%	JP	42% <mark>30</mark>	*	27%48%	JP	49% <mark>40</mark> %	ń
Providing preventative care	27% 419	24 <mark>%46%</mark>	JP UK	19 <mark>% 43%</mark>	JP UK	23 <mark>%</mark> 49%	JP UK ★	44% <mark>2</mark> 4	*	46% <mark>2</mark> 6	*	35% <mark>45%</mark>	JP UK
Attracting and retaining high quality clinicians	36% 399	25% <mark>51%</mark>	IN JP B	24 <mark>%43%</mark>	JP	32% 40%	JP	48% <mark>1</mark>	*	37% <mark>38</mark> 9	JP	54% <mark>35</mark> %	JP
Ensuring sufficient clinicians to meet patient demand	38% 359	3 <mark>7%</mark> 32	JP	26 <mark>%41%</mark>	US JP	3 <mark>5%</mark> 40%	JP	52% <mark>2</mark> 0	*	49%32	JP	40% <mark>35</mark> %	JP
Providing access to digital tools (including AI) that help me make clinical decisions	44% <mark>2</mark> 8	32% <mark>29</mark>	JP	25 <mark>%36</mark> %	JP UK BR ★	4 <mark>3%</mark> 33%	JP UK	60%1	*	50% <mark>2</mark> 0	į,	60% <mark>24</mark> %	JP

Base: 1753

By Key Country

Clinicians Doctors Nurses

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 Al training, the UK is significantly behind, according to doctors (2/2)



Performance by my institution



	Doctors n= 1693 - 1753	USA n= 143 - 156	China n= 412 - 421	India n= 249 - 29	Japan n= 134 - 136	UK n= 70 - 77	Brazil n= 80 - 84	oca _s o
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	45% <mark>25</mark> %	38% <mark>31</mark> %	JP پار 22<mark>% 32</mark>%	JP ★ 45%	JP 70% مراب 70% 12%	★ 40%	JP 24% 🖟 64% 23%	JP
Providing guidance/training on the use of Al (artificial intelligence) tools to clinicians	50% <mark>23</mark> %	4 <mark>2%21</mark> %	^{JP UK}	US IN JP UK★ 50%2 BR	26% F 71% 9%	★ 67% 10	0% ★ 70% 22 %	JP, UK, J

By Key Country





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 Al governance and training, according to nurses (1/2)



Performance by my institution

(artificial intelligence) tools to clinicians



Base: 421

By Key Country



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 Al governance and training, according to nurses (2/2)



Performance by my institution



%Very Poor / Poor & Very Good / Good	Nurses 2/2 n= 398 - 421	USA n= 82 - 87		China = 59 - 60		ndia n= 33 - 35		Japan n= 31 - 32		UK n= 27 - 31	Brazil n= 22 - 23	615,0
Providing access to digital tools (including that help me make clinical decisions	AI) 34% 369	29%39%	17	17 <mark>%49%</mark>	IN JP	33% <mark>27</mark> %	17.	34% <mark>25</mark> %	17	39% <mark>39</mark> %	Too few res	ال المراد
Ensuring a governance team is in place to manage Al (artificial intelligence) (set polic acquire tools)		3 <mark>7%32</mark> %	JP	19 <mark>%53%</mark>	US IN JP	3 <mark>8%1</mark> 5%	*	48% 6%	*		Too lew res	polises

By Key Country







Significantly higher/ lower than all nurses

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 &	Clinicians	Doctors		Nurses	
Very Good / Good	n= 2144 - 2173	n= 1737 - 1754	063	n= 407 - 419	06.01,60
Making healthcare accessible to all	23 <mark>% 59%</mark>	<mark>27%</mark> 50%	*	20% 69%	★ DR
Providing preventative care	27% <mark>48%</mark>	3 <mark>2%</mark> 39%	*	23 <mark>% 56%</mark>	★ DR
Ensuring adequate workforce capacity	39% <mark>40%</mark>	44% <mark>30</mark>	*	3 <mark>4%</mark> 49%	★ DR
Funding healthcare (including new hospitals)	3 <mark>4%</mark>	41% <mark>33</mark> 9	*	27% <mark>41</mark> %	DR
Funding clinical research	3 <mark>8%</mark>	48% <mark>27</mark>	*	2 <mark>7% 45%</mark>	★ DR

	Overall	
Clinicians	Doctors	Nurses

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



Rack to

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 n= 143 - 144
Making healthcare accessible to all	23 <mark>% 59%</mark>	53% <mark>31</mark> %	39% <mark>46%</mark> ★ NA	20% 61%	14% 68% ★ EU MA 32% 49%
Providing preventative care	27% <mark>48%</mark>	48% <mark>28</mark> %	3 <mark>8%39%</mark> ★ NA	34% <mark>35</mark> %	19 <mark>% 58% ★ ^{NA SA} 24</mark> % 54%
Ensuring adequate workforce capacity	3 <mark>9%</mark> 40%	52% <mark>29</mark> %	58% <mark>25</mark> %	51% <mark>26</mark> %	28 <mark>%51% ★ NA SA</mark> 4 <mark>0%</mark> 36% ★ EUMA 4
Funding healthcare (including new hospitals)	3 <mark>4%</mark> 37%	★ 49% <mark>25</mark> %	المالية 49%<mark>32</mark>%	★ 45% <mark>28</mark> %	24 <mark>%44% * NA SA</mark> EU 3 <mark>9%38</mark> %
Funding clinical research	3 <mark>8%</mark> 36%	★ 49% <mark>28</mark> %	★ 64% <mark>26</mark> %	★ 46% <mark>27</mark> %	26 <mark>%44% * NA SA 51%</mark> 29%

Base: n= 2144 - 2173

By Region



Doctor

Nurse

71

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



	<u>'</u>					
%Very Poor / Poor & Very Good / Good	Doctors n= 1737 - 1754	North America n= 168 - 174	South America n= 132 - 132	Europe n= 344 - 351		Middle East & Africa n= 105 - 106
Making healthcare accessible to all	2 <mark>7%</mark> 50%	59% <mark>2</mark> 0% *	41% <mark>39</mark> %	22 <mark>%55%</mark>	19 <mark>%56%</mark> * NA S	35% 47%
Providing preventative care	32% 399	55% <mark>22</mark> %	43% <mark>32</mark> %	33% <mark>35</mark> %	25 <mark>%44%</mark> * NA S	sa ≄ NA S. EU 26%52 %
Funding healthcare (including new hospitals)	41% 33°	57% <mark>23</mark> %	52% <mark>28</mark> %	46% <mark>26</mark> %	3 <mark>3%38% * NA S</mark>	EA 46% 38% EN
Ensuring adequate workforce capacity	44% 30	52% <mark>24</mark> %	61% <mark>23</mark> %	★ 52% <mark>23</mark> %	3 <mark>7%35</mark> % * NA S	SA 54 NA SA 54 NA SA EU
Funding clinical research	48% <mark>27</mark>	60% <mark>2</mark> 0%	★ 72% <mark>1</mark> 8%	★ 56% <mark>2</mark> 1%	3 <mark>7%34</mark> % ** NA S	63% 21%

By Region

Clinicians

Doctors

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% <mark>41% *</mark>	38% <mark>53%</mark> 🛫	18% 66% 🕏	10% 81% ★ EU MA 29% 50% ★
Providing preventative care	23 <mark>%</mark> 56%	41% <mark>35</mark> % *	32% <mark>47%</mark> 🕆	34% <mark>36</mark> % ★	14% 71% * NA SA 21%55% \$ \$\frac{1}{12}\$ EU
Ensuring adequate workforce capacity	34% <mark>49%</mark>	52% <mark>34</mark> % *	54% <mark>27</mark> % ★	50% <mark>28</mark> % ★	20% 67% ** NA SA 27% 34% ***
Funding clinical research	27% <mark>45</mark> %	39% <mark>35</mark> %	57% <mark>34</mark> % 📈	36% <mark>34</mark> % 💆	15% <mark>53%</mark> EU 3 <mark>9%37</mark> % 💆
Funding healthcare (including new hospitals)	27% <mark>41</mark> 9	42% <mark>27</mark> % *	45% <mark>35</mark> % 🕏	43% <mark>29</mark> % *	14% <mark>50% </mark>

Base: n= 407 - 419

By Region









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)



Performance by my national government



%Very Poor / Poor & Very Good / Good	Clinicians n= 2144 - 2173	USA n= 233 - 243		china = 468 - 479		ndia = 286 - 287		lapan = 166 - 167		UK n= 103 - 108		Brazil n= 107 - 108	
Making healthcare accessible to all	23 <mark>% 59%</mark>	56% <mark>28</mark>	*	5% 80%	US IN JP UK BR	17 <mark>%</mark> 69%	US UK BR	21% <mark>55%</mark>	US	18% 58%	US	36% <mark>48%</mark>	US
Providing preventative care	27% <mark>48%</mark>	50% <mark>27</mark>	*	10% 66%	US JP UK 🛧 BR	21 <mark>%</mark> 62% JP	US UK 🛧 BR	28% <mark>38</mark> 9	US ★	35% <mark>40%</mark>	US	33% <mark>44%</mark>	US
Ensuring adequate workforce capacity	3 <mark>9% 40%</mark>	51% <mark>2</mark> 9	*	15% <mark>60%</mark>	US JP UK 🛊 BR	29% <mark>55%</mark> JP	US UK 🛊 BR	55% <mark>28</mark>	*	49% <mark>30</mark>	14	55% <mark>25</mark> %	*
Funding healthcare (including new hospitals) 3 <mark>4% 37</mark> %	53% <mark>2</mark> 4	★ JP	11% <mark>49%</mark>	US JP UK 🛨 BR	25%<mark>55%</mark> JP	US UK‡ BR	47% <mark>1</mark> 3%	*	44% <mark>30</mark>	JP	48% <mark>33</mark> %	JP_I
Funding clinical research	3 <mark>8% 36</mark> %	51% <mark>25</mark>	*	10% <mark>51%</mark>	US JP UK * BR	32% 49% JP	US UK* BR	51% <mark>1</mark> 8%	*	34%349	JPL	61% <mark>28</mark> %	51

Base: n= 2144 - 2173

By Key Country



Doctor

Nurse

Doctors' views of national government performance

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



Performance by my national government

Significantly higher/ lower than all doctors



%Very Poor / Poor & Very Good / Good	Doctors n= 1737 - 1754	USA n= 152 - 158		China n= 408 - 419		n dia = 251 - 253		Japan n= 134 - 135		UK n= 74 - 77		Brazil n= 85 - 85
Making healthcare accessible to all	27% <mark>50%</mark>	62% <mark>1</mark> 8%	*	10% 64%	US IN JP	28% <mark>4</mark> 9%	US	21% <mark>51%</mark>	US	19%55%	US BR-J	41% 39% us
Providing preventative care	32% <mark>39%</mark>	56% <mark>2</mark> 1%	*	17 <mark>%</mark> 50%	US JP UK ★ BR	29% 45%	US Jp	38% <mark>2</mark> 1%	*	39% <mark>35</mark> %	US JP	45% <mark>35</mark> % us JP
Funding healthcare (including new hospitals)	41% <mark>33</mark> %	58% <mark>22</mark> %	JP ★	20 <mark>%45%</mark>	US JP UK 🛨 BR	3 <mark>8%</mark> 40%	US JP U	63% <mark>1</mark> 1%	*	52% <mark>27</mark> %	JP	51% 29% JP
Ensuring adequate workforce capacity	44% <mark>30</mark> %	52% <mark>25</mark> %	JP.	23 <mark>%40%</mark>	US JP UK 🛨 BR	4 <mark>2%</mark> 37%	US JP U K BR	70% 10%	*	53% <mark>22</mark> %	JP	60% <mark>22</mark> % JP
Funding clinical research	48% <mark>27</mark> %	61% <mark>1</mark> 9%	*	19 <mark>%44%</mark>	US IN JP UK * BR	47% 30%	US JP	67% 12%	*	50% <mark>23</mark> %	JPL	69% <mark>21</mark> % \$

Base: n= 1737 - 1754

By Key Country



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)



Performance by my national government



%Very Poor / Poor & Very Good / Good	Nurses n= 407 - 419 n=		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% <mark>38%</mark>	*	0%95%	US UK	6% 89% U	is IK 🛨	22% 59%	US	16%61%	US ^{vi} j	
Providing preventative care	23 <mark>% 56%</mark>	44% <mark>34</mark> %	*	3% 82% P	US UK 🛊	1 2% 79%	IS IK ★	19% <mark>56%</mark>	US	32% <mark>45%</mark>	T ^A Z	ť
Ensuring adequate workforce capacity	34% <mark>49%</mark>	51% <mark>33</mark> %	*	7% 80%P	US UK 📥	17% 71%pu	IS IK 🛊	41% <mark>47%</mark>	W	45% <mark>39</mark> %	Too few res	sponses
Funding clinical research	27 <mark>% 45</mark> %	41% <mark>32</mark> %	*	2% 58%	US JP 🛨	17% 69% J	IS IP 🛨	34% <mark>25</mark> %	*		J.	7.7
Funding healthcare (including new hospitals)	27 <mark>% 41</mark> 9	48% <mark>25</mark> %	*	2% 53%	US JP	11% 69% p U	IS IK 🛨	31% <mark>1</mark> 6%	*	37% <mark>33</mark> %	\$-3	7.5

Base: n= 407 - 419

By Key Country







Al 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%)

Base: n= 2206



% Perceive Negatively/ Positively	Clinicians n= 2206	Doctors n= 1781	062	Nurses n= 425	06.0(en
Take up my time Save me time	18 <mark>% 57%</mark>	21 <mark>%</mark> 53%	*	15% 61%	√5 DF
Devalue me Empower me	20 <mark>% 53%</mark>	23 <mark>%</mark> 50%	ij	17 <mark>% 56%</mark>	☆ DF
Give me less choice Give me more choice	18 <mark>% 53%</mark>	20 <mark>%</mark> 47%	*	16 <mark>% 58%</mark>	Ĵ DF
Provide unhelpful answers Provide useful answers	21 <mark>% 49%</mark>	23 <mark>%</mark> 45%	*	19 <mark>% 53%</mark>	Ĭ√ DF
Reduce my autonomy Increase my autonomy	24 <mark>% 40%</mark>	29% <mark>35</mark> 9	*	20 <mark>% 45</mark> %	★ _{DF}
Unreliable Trustworthy	26 <mark>% 40%</mark>	28% <mark>32</mark> °	*	23 <mark>% 47%</mark>	★ DF

	Overall	
Clinicians	Doctors	Nurses

78

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



79

% 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% <mark>57%</mark>	22 <mark>%47% *</mark>	20% <mark>56%</mark>	21% <mark>51% ★</mark>	15 <mark>% 62%</mark> *	NA EU 16%55%
Devalue me Empower me	20 <mark>%</mark> 53%	31% <mark>30</mark> *	22% 60% NA EU	24% <mark>45% ★</mark> NA	15 <mark>% 61%</mark> ★ □	NA U MA 24% 49%
Give me less choice Give me more choice	18 <mark>%53%</mark>	29% <mark>25 *</mark>	14% <mark>58%</mark>	18% <mark>46% ★</mark> NA	15 <mark>% 60%</mark> ★ □	NA U MA 26 <mark>%51%</mark> NA
Provide unhelpful answers Provide useful answers	21 <mark>%49%</mark>	27% <mark>36</mark> ° *	22% <mark>51%</mark>	22% <mark>45%</mark>	18 <mark>%</mark> 54% [★] □	NA U MA 31% 43%
Reduce my autonomy Increase my autonomy	24 <mark>%40%</mark>	33% <mark>28</mark> *	28% <mark>45%</mark>	29% <mark>37</mark> % 5 NA	20 <mark>%43%</mark>	NA EU 21%39 %
Unreliable Trustworthy	26 <mark>%40%</mark>	3 <mark>7%</mark> 2(★	24 <mark>%39%</mark>	31% <mark>29</mark> % ★ ^{NA}		A SA U MA 28% 39 % EU

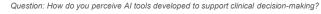
By Region

Clinicians

Doctors

Nurses





Base: n= 2206

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	062) 0	Asia Pacific n= 990	Middle East & Africa n= 109
Take up my time Save me time	21 <mark>%</mark> 53%	24%44%	22 <mark>%56%</mark> NA	24% <mark>47%</mark>	*	19 <mark>%57%</mark>	¹ NA EU 21 % 54%
Devalue me Empower me	23 <mark>%</mark> 50%	27% <mark>30</mark>	25% <mark>58%</mark>	23% <mark>44%</mark>	★ NA	21 <mark>%56%</mark>	[★] NA EU 28%49%
Give me less choice Give me more choice	20% 47%	29 <mark>%24</mark> %	16% <mark>57%</mark>	21% <mark>38</mark> %	★ _{NA}	18 <mark>%54%</mark>	NA 25%55% NA EU
Provide unhelpful answers Provide useful answers	23 <mark>%</mark> 45%	28% <mark>34</mark> %	22% <mark>52%</mark> NA EU	23% <mark>41%</mark>	74	22% <mark>48%</mark>	NA 28%44%
Reduce my autonomy Increase my autonomy	29% <mark>35</mark> 9	3 <mark>8%22</mark> %	24 <mark>%43%</mark> NA	29% <mark>34</mark> %	NA NA	28 <mark>%37</mark> %	NA 24%39% NA
Unreliable Trustworthy	28% 32	★ 38% <mark>1</mark> 9%	23 <mark>%34</mark> % NA EU	35% <mark>25</mark> %	*	24 <mark>%38</mark> %	★ NA 28%38% NA EU

Base: 1781

By Region

Clinicians Doctors

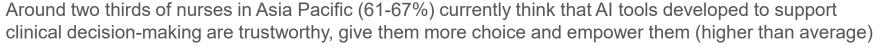
Nurses



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

How AI impacts nurses







Back to

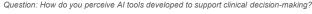
% Perceive Negatively/ Positively	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	002) ©	Asia Pacific n= 180	Middle East & Afric n= 38
Take up my time Save me time	15 <mark>% 61%</mark>	21% <mark>49%</mark> *	19 <mark>%57%</mark>	18 <mark>%</mark> 54%	t)	12% <mark>67%</mark>	55 NA EU 11% 55%
Give me less choice Give me more choice	16 <mark>%</mark> 58%	29% <mark>26</mark> %	12% <mark>60%</mark>	15 <mark>%</mark> 54%	√ NA	12% <mark>67%</mark>	NA EU MA 26%47%
Devalue me Empower me	17 <mark>%</mark> 56%	35% <mark>30</mark> %	19 <mark>% 62%</mark> NA	24% <mark>47</mark> %	NA	9% 65%	NA 21%50%
Provide unhelpful answers Provide useful answers	19 <mark>%</mark> 53%	27% <mark>38%</mark>	22 <mark>%50%</mark>	21% <mark>50%</mark>	7.7	14 <mark>% 59%</mark>	NA 34% 42%
Unreliable Trustworthy	23 <mark>%47%</mark>	37% <mark>2</mark> 1%	25%44% NA	27% <mark>32</mark>	*	17% <mark>61%</mark>	* NA 29%39% EU MA
Reduce my autonomy Increase my autonomy	20 <mark>%45</mark> %	2 9% <mark>34</mark> %	31% <mark>47%</mark>	29% <mark>41</mark> %	T.	12% <mark>50%</mark>	ರ್ NA 18<mark>%</mark>39%

By Region

Clinicians Doctors Nurses

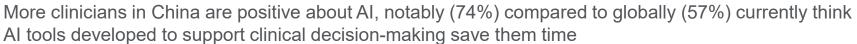
Significantly higher/ lower than all nurses

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



Base: 425

How AI impacts clinicians







% Perceive Negatively/ Positively	Clinicians n= 2206	USA n= 247	China n= 481		i dia : 292		apan = 170	UK n= 109		Brazil = 108	00.0,0
Take up my time Save me time	18 <mark>% 57%</mark>	22 <mark>%46%</mark>	± 12%	us IN JP UK	21 <mark>%</mark> 49%	*	14% 66% IN U	s K ★ 26%43 %	*	20% <mark>57%</mark>	UK
Devalue me Empower me	20 <mark>% 53%</mark>	31% <mark>31</mark>	★ 11%	68% US IN UK *	19 <mark>%</mark> 56%	US UK	11% 61%	s × ★ 28% <mark>35</mark> °	*	19% 63%	US UK
Give me less choice Give me more choice	18 <mark>% 53%</mark>	29% <mark>25</mark>	★ 11%	71% US IN JP UK #	20 <mark>%</mark> 54%	US UK	13%54%	s ĸ∦ 18% <mark>3</mark> 9%	US ★	15% <mark>56%</mark>	US UK
Provide unhelpful answers Provide useful answers	21 <mark>% 49%</mark>	28% <mark>37</mark> 9	★ 13%	63% US IN JP UK *	20 <mark>%</mark> 50%	US UK	18% <mark>46%</mark>	√ 24 <mark>%</mark> 399	*	19% <mark>50%</mark>	US
Reduce my autonomy Increase my autonomy	24 <mark>% 40%</mark>	34% <mark>26</mark>	★ 12%	53% US IN #	25 <mark>%</mark> 34%	uş *	23 <mark>%</mark> 41%	ร ห _{ู้}	*	25% <mark>46%</mark>	IN US.√ UK
Unreliable Trustworthy	26 <mark>% 40%</mark>	35% <mark>2</mark> 0	★ 14%	61% US IN FINE BR	29% <mark>39</mark> %	US_ UK	17%50% IN U	к ≭ 33%2 3	*	25% <mark>37</mark> %	US

By Key Country

Clinicians

Doctors

Nurse:



Question: How do you perceive Al 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 USA n= 160		China n= 421	India n= 257			apan = 137	UK n= 78		Brazil n= 85		0 C.D. U	
Take up my time Save me time	21 <mark>%</mark> 53%	24 <mark>%46%</mark>	16 <mark>% 62%</mark>	US IN UK 📥	24 <mark>%</mark> 43%	*	19 <mark>% 65%</mark> IN	US UK 🛨	33% <mark>37</mark> 9	*	18% 61%	IN US JL UK	
Devalue me Empower me	23 <mark>% 5</mark> 0%	26 <mark>%30 ★</mark>	18 <mark>% 62%</mark>	US IN UK 🛧	29% <mark>47</mark> %	US	15% <mark>59%</mark> IN	US UK 🛊	31% <mark>38</mark> 9	*	21% 60%	IN US J UK	
Give me less choice Give me more choice	20% 47%	31% <mark>25 ★</mark>	14 <mark>% 61%</mark>	US IN UK 🛧	25 <mark>%</mark> 44%	US	15% <mark>51%</mark>	us 🎵	23%40%	US	12% 60%	IN US 🛊 UK	
Provide unhelpful answers Provide useful answers	23% 45%	28% <mark>36° *</mark>	19 <mark>%53%</mark>	US IN JP UK 🛣	26 <mark>%</mark> 42%	74	21%40%	7.47	28%32	*	21% 52%	US_L_ UK \	
Reduce my autonomy Increase my autonomy	29% 359	39% <mark>22 *</mark>	23 <mark>%44%</mark>	US IN 🛨	36% <mark>28</mark> %	*	28% <mark>34</mark> °	US J	35% <mark>33</mark> 9	7,7	20% 44%	IN JU	
Unreliable Trustworthy	28% 32	3 <mark>7%</mark> 19 *	19 <mark>%44%</mark>	US IN 🛨	3 <mark>2%</mark> 29%	US	26% <mark>36</mark> 9	US 🖧	37% <mark>2</mark> 4	Ţ.	24% <mark>35</mark> 9	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)

Base: 1781

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		<mark>china</mark> = 60		i dia : 35		Japan n= 33		UK n= 31	Braz n= 23	862 Q
Take up my time Save me time	15% 61%	21 <mark>%47%</mark>	*	7% 859	JS IN P UK 🛨	17 <mark>%</mark> 54%	J-1	9% 67%	rh	19%48%	į,	Ş-3
Give me less choice Give me more choice	16 <mark>%</mark> 58%	28%24%	*	7% 829	JS IN P UK 🛨	14 <mark>%</mark> 63%	US	12% <mark>58%</mark>	US	13%399	*	
Devalue me Empower me	17 <mark>% 56%</mark>	37% <mark>31</mark> %	*	5% 73%	US UK 🛧	9% 66%	US UK	6% 64%	US UK?	26%32	★ Too fe	ew responses
Provide unhelpful answers Provide useful answers	19 <mark>% 53%</mark>	28% <mark>38</mark> %	*	8% 72%	US UK	14%57%	5.4	15% <mark>52</mark> %	T. 7	19%45%	74	54
Unreliable Trustworthy	23 <mark>% 47</mark> %	3 <mark>3%21</mark> %	*	8% 78%	6 ^{US IN} ★	26% <mark>4</mark> 9%	US. UK	9% 64%	UŞL UK	29%23	*	يار ا
Reduce my autonomy Increase my autonomy	20 <mark>% 45</mark> %	30% <mark>30</mark> %	*	2% 62%	US IN 🛨	14% <mark>40</mark> %	5,15	18% <mark>48</mark> %	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)

Base: 425

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

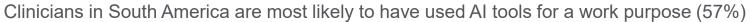




	Clinicians N= 2206	Doctors N= 1781		Nurses N= 425	662t 6	
Yes – for a work purpose	48%	48%	527	49%	547	Clinicians who used Al
Yes - for a non-work purpose	<mark>28</mark> %	26	75	30°	JL_ }.i	products for a work purpose • 2024: 26%
No	<mark>21</mark> %	23	J-3	19		
Don't know / not sure	3%		T)	1	ţ,	



Base: n= 2206





	Clinicians n= 2206	North A	merica	South A	merica	Europe n= 439	960,0	Asia Pa		Middle Eas	t & Africa	Back hom
Yes – for a work purpose	48%	37%	*	57%	NA EU	32%	*	56%	NA LEU MA	47%	EU J.J.	
Yes - for a non-work purpose	<mark>28</mark> %	21	*	<mark>22</mark> %	75	37%	SA NA ★AP MA	<mark>27</mark> %	75	27%	강	
No	<mark>21</mark> %	37%	★AP MA	18%	T.	29 ⁹	SA ★AP MA	<mark>1</mark> 4%	*	19%	7-J	
Don't know / not sure	3%	5%	†	3%	ţ';	3%	ti.	3%	ń	7%	₩ U AP	

By Region

Clinicians

Doctor

Nurse



Base: n= 2206



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 Ame	erica South A	America	Europe n= 358	•	Asia Pa	acific	Middle Ea	est & Africa Ba
Yes – for a work purpose	48%	35%	63%	NA EU ★ MA	31%	*	55%	± EU	46%	EU
Yes - for a non-work purpose	26'	23	17%	*	33%	SA NA	<mark>25</mark> %	S/	28%	SA SA
No	23	40%	SA 15%	*	33%	SA ★AP MA	<mark>1</mark> 6%	*	20%	5.7
Don't know / not sure	4%	3% ☆	5%	Å	3%	t	3%	ń	6%	7.7

By Region

Doctors

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



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

	Nurses n= 425	North Ai	merica	South A	America	Europe n= 81	***************************************	Asia Pa	acific	Middle East	& Africa	Back to home
Yes – for a work purpose	49%	40%	7.7	50%	_l_].\/	34%	*	57%	N/	47%	T.	
Yes - for a non-work purpose	<mark>30%</mark>	20%	*	28%	ĬŢ.	40%	NA NA	<mark>29</mark> %	17.	<mark>26</mark> %	i,	
No	19%	34%	★ AP	<mark>22</mark> %	t)	<mark>24</mark> %	AP	<mark>1</mark> 2%	5	18%	T)	
Don't know / not sure	3%	7%	AP	0%	ú	2%	Å	2%	th	8%	ń	

By Region

Clinicians Doctors Nurses

Base: n= 425

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%	US UK	34%	*	55%	US IN UK
Yes - for a non-work purpose	<mark>28</mark> %	21	*	<mark>24</mark> %	يار ا	32%	્રા_ CH US	32%	્રા_ US CH	31%	્રા US	<mark>24</mark> %	
No	<mark>21</mark> %	38%	★ CH IN JE BE	3%	*	24%	₹ CH	18	₹ CH	32%	★ CH JP BR	19%	₹ CH
Don't know / not sure	3%	6%	T) CH	2%	*	4%	说 CH	3%	1.7	2%	7,7	2%	Ĭ.

Base: n= 2206

By Key Country

Clinicians

Doctor

Nurse:



organical dy angular bottoon bottain of (maloutou by 2 rottors, org. or a canal)







	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	33%	*	UK	60%	₩ US	21	*	62%	# US IN UK
Yes - for a non-work purpose	26	22	듔	<mark>25</mark> %	JJ JP	29%	7,5	JP BR	16%	*	33%	J. JF	18%	Ĭ <u>Ţ</u>
No	23	39%	*	CH JP BR	*	33%	*	CH JP BR	23%	ς⊩ CH	45%	★ CH JF BF	15%	₽ CH
Don't know / not sure	4%	3%		3%	7.7	5%	7.7	JP	1%	Ϋ́	1%	5.7	5%	7,7

Base: n= 1781

By Key Country

Doctors

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





	Nurses n= 425	USA n= 87	0C2_O	China n= 60	otzi ದ	India n= 35	662,3	Japan n= 33	962) ()	UK n= 31	0೭೭] ಬ	Brazil n= 23
Yes – for a work purpose	49%	37%	*	73%	US IN	49%	7.1	33%	5.77	48%	7.7	7.4
Yes - for a non-work purpose	30%	20	*	<mark>23</mark> %	T.	34%	Ţ	48%	★ US CH	29 ⁹	12	Too few responses
No	19	36%	★ CHII	3%	*	14%	FF C	H 1		19	J.J. CH	d √,
Don't know / not sure	3%		★ C	⊎ 0%	☆	3%	Å	6%	ú	3%	ú	ជ

By Key Country

Clinicians Doctors Nurses

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

	Clinicians N= 1054	Doctors N= 863	Nurses N= 191	552.6
Never	3%	3%	3%	Z-1
Rarely	8%	8%	8%	t
Occasionally	<mark>38%</mark>	36%	41%	_1_1
Frequently	41%	44%	38%	7.7
Always	9%	9%	9%	分



Overall



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

	Clinicians n= 1054	North A	America	South A	America	Europ n= 141) e	Asia P n= 637	acific	Middle Ea	ast & Africa
Never	3%	9%	AP MA	7%	AP MA	7%	AP MA	1%	*	0%	\rangle -1
Rarely	8%	20%	SA ★AP MA	8%	ជ់	19%	SA ★AP MA	4%	*	8%	ជ់
Occasionally	38%	37%	N.	<mark>29</mark> %	W	34%	N.	41%	14	37%	las
Frequently	41%	31%	يال إما	38%).J	32%	*	45%	<u> </u>	45%) ¹
Always	9%	3%	*	17%	★ NA EU AP	7%	پات ا	9%	جا ا ا	10%	}-j

By Region

Clinicians

Doctor

Nurses



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

	Doctors n= 863	North A	America	South n= 83	America	Europ n= 112) e	Asia P	acific	Middle Ea	st & Africa
Never	3%	5%	ا آبا	7%	AP	6%	AP	2%	5/-5	0%	اب اب
Rarely	8%	28%	SA EU ★AP MA	5%	t	14%	sa ★ AP	5%	*	10%	7.7
Occasionally	36%	31%	1	37%	Taj	36%	N	<mark>36%</mark>	14	36%	The state of the s
Frequently	44%	33%	7.7	40%	7	37%	يال <u>.</u> كِمرَّ	49%	7 E	NA EU 40%	74
Always	9%	3%	چالے اِ۔۔ا	<mark>1</mark> 1%	Ş.;	8%	<u> </u>	9%	٢٠٠٦	<mark>1</mark> 4%	Ş-j NA

Clinicians Doctors Nurses

Significantly higher/ lower than all doctors

Use of generalist Al tools by nurses in practice by region



Of North American nurses who have used Al for work, 13% have never used a generalist Al tool for work

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



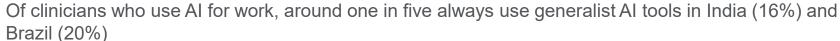
	Nurses n= 191	North A	America	South America n= 16	Europe n= 29	Asia P	acific	Middle East & Africa
Never	3%	<mark>1</mark> 3%	AP)-1	\$	1%	ŞJ	,
Rarely	8%	13%	AP	Too few responses	7	3%	7.7	Too few responses
Occasionally	41%	42%	14	127	7.N	46%	$\overline{\mathcal{W}}$	7.d/
Frequently	38%	30%)(7 ^h ~)	41%	7.7	7 ^L -7
Always	9%	3%	ا ا	چالج با- تا	\$	9%	چالے آپ	}. .

By Region

Nurses



Use of generalist Al tools by clinicians in practice by country







Use generalist Al 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		Brazi n= 64	06.00, 10
Never	3%	<mark>1</mark> 1%	★ CHIN JP 1%	*	1%	رار ایرا	0%	14	4%	را <u>.</u> اد آ	3%	<u> </u>
Rarely	8%	<mark>22</mark> %	★ CHIN JP 3%	*	3%	ជ	2%	*	22%	★ CH	12%	CH IN JP
Occasionally	38%	37%	38%	⊩ BR	47%	→ BR	63%	★ US CH IN UK BR	34%	W	<mark>23</mark> %	*
Frequently	41%	<mark>28</mark> %	★ 52%	★ US IN JP UK	33%	7.47	27%	*	30%	747	41%	7.7
Always	9%	3%	6 %	75	16%	★ CH US	9%	Å	10%	J-1	20%	★ CHUS

By Key Country

Clinicians

Doctor

Nurse



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

Base: n= 1054

Use of generalist Al tools by doctors in practice by country







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

	Doctors n= 863	USA n= 57	China n= 292	062) KJ	India n= 85	6CD ₁ 3	Japan n= 82	0620,43	UK n= 16	8CD, 60	Brazil n= 53	662), D
Never	3%	5%	^{JP} 2%	\ \-\]	2%	ران آمار	0%	The state of the s			6%	JP
Rarely	8%	28%	★ CHIN JP 4%	*	7%	ű	2%	Ĭ.,		ដែ	8%	Ü
Occasionally	36%	30%	32%	14	46%	L CH	48%	★ US CH		12	34%	W
Frequently	44%	33%	54%	★ US	IN JP 39%	7~	41%	W.		7.7	38%	14
Always	9%	4%	\$ 8 %	<u>}-</u> j	6%	뒱	9%	ů		يال أ-يا	15%	J US

By Key Country

Clinicians Doctors Nurses

Significantly higher/ lower than all doctors

Use of generalist Al 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 Al 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%	<mark>1</mark> 6%	*	^{CH} 0%	J-1		ج ^{ال} ے آبا	آمراً ا	ر ال احا	رار آ- آ
Rarely	8%	16%	ជ	^{CH} 2%	Ü		ń	∏ Too few respo	onses	ά
Occasionally	41%	44%	12	43%	1 N		12	Too low Toope	- ¹ - 1 ₋	-1-/ 1-/
Frequently	38%	<mark>22</mark> %	7.7	50%	J. US		7.7	,	7/17	51.7
Always	9%	3%	7	5%	Z.P.		55	ģ	\$	}.J

By Key Country

Nurses



Use of clinical-specific Al tools by clinicians in practice



LSEVIER

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 Al tools (e.g. Open Evidence/ Merative) for work purposes

	Clinicians	Doctors	Nurses	
	N= 1054	N= 863	N= 191	0.621,41
Never	<mark>24</mark> %	<mark>28</mark> %	NU <mark>21</mark> %	*
Rarely	<mark>26</mark> %	<mark>24</mark> %	<mark>27</mark> %	7.7
Occasionally	<mark>28</mark> %	<mark>24</mark> %	32 %	☆ DR
Frequently	<mark>18</mark> %	<mark>19</mark> %	18%	7.7
Always	4%	5%	<u>5</u> 5	\\\

	Overall	
Clinicians	Doctors	Nurses

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







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

	Clinicians n= 1054	North A	America	South A	America	Europ n= 141) e	Asia P n= 637	acific	Middle Ea	st & Africa
Never	<mark>24</mark> %	<mark>23</mark> %	را. ا- آ	34%	AP	34%	AP ★	<mark>21</mark> %	<u> </u>	<mark>23</mark> %	رساني احا
Rarely	<mark>26</mark> %	<mark>20</mark> %	1/3	<mark>1</mark> 5%	*	29%	SA	<mark>28</mark> %	\$ T.J.	22 %	7.7
Occasionally	<mark>28</mark> %	32%	SA EU	<mark>19</mark> %	*	14%	*	<mark>32%</mark>	L S	38%	SA EU
Frequently	18%	<mark>22</mark> %	يال أما	<mark>22</mark> %	کامڈ ا	20%	7	<mark>17</mark> %		1 5%	<u>ال</u> إمر
Always	4%	4%	<u> </u>	<mark>1</mark> 1%	★ EU AP MA	3%	چا <u>ل</u> إحا	3%	چالے إ-نا	2%	Ş-3

By Region

Clinicians

Doctor:

Nurse



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

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





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

	Doctors n= 863	North A	America	South A	America	Europ n= 112	e	Asia P	acific	Middle Ea	st & Africa
Never	28%	<mark>26</mark> %	جا اب- آ	<mark>27</mark> %	<u></u>	42%	SA NA AP	<mark>25</mark> %	5/5	30%	راني اب
Rarely	<mark>24</mark> %	18%	tz	17%	ជ	16%	*	<mark>29</mark> %	th E	22 %	ź
Occasionally	<mark>24</mark> %	<mark>28</mark> %	h.	<mark>19</mark> %	14	20%	A.	<mark>26</mark> %	W	20%	1. 1/
Frequently	19%	<mark>26</mark> %	JL AP	<mark>23</mark> %	ال أما	20%	ال أماً	<mark>1</mark> 6%	7.7	24%	
Always	5%	2%	چا <u>۔</u> آ۔ن	<mark>1</mark> 4%	★ NA EU AP	3%	ال _ح }-ت	4%	اب جائے	4%	<u>}-</u> ;

By Region Doctors

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

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



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



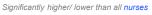
	Nurses n= 191		erica South America	Europe n= 29	Asia Pacific	Middle East & Africa
Never	21	20%	ដ ដ	\(\begin{align*} \cdot \ \cdot \cdot \end{align*} \]	<mark>16</mark> % 55	7-3
Rarely	27 °	<mark>22</mark> %	Too few res	sponses 🛱	<mark>27</mark> % 🕏	∜ Too few responses
Occasionally	32%	35%	A. J.	1×1	37%	-\frac{1}{1\sqrt{\sqrt{\sqrt{\chi}}}
Frequently	18	18%	1√ 5√)(18% SA	<u> </u>
Always		5%	M. 51-3	رالي آي-نا	1%	ŞJ

By Region

Clinicians

Doctor

Nurses





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

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





Use clinical-specific Al 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	<mark>24</mark> %	<mark>26</mark> %	الح أحا	^{CH} 14%	*	20%		52%	US CH IN UK BR	21%	آرآ	34%	CH IN
Rarely	<mark>26</mark> %	16%	7.7	31%	*	us _{JP} 25% _{BR}	Å	20%	1.7	36%	US BF	18%	Ť.
Occasionally	28%	29%	A. Jay	32%	12	JP BR 36%	→ JP UK W BR	19%	5.7	15%	N	16%	*
Frequently	18%	<mark>25</mark> %	51.7	^{JP} <mark>20</mark> %	5.7	JP 17%	JL JP	5%	*	20%	ŢĹŢ JF	° <mark>20</mark> %	J. JP
Always	4%	4%	ઇ	3%	75	1%	Z	3%	Ġ	8%	Z IN	12%	★ CH IN JP

By Key Country

Clinicians



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

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



Use clinical-specific Al 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	289	26°	5.7	<mark>20</mark> %	*	<mark>24</mark> %	55	51%	₩ US CH ★ IN BR	5/7	19%	57
Rarely	24	14%	13	30%	*	us 27 %	T.	<mark>27</mark> %	77	†; Too few responses	17%	Ü
Occasionally	24	30%	1 _A	^{JP} <mark>26</mark> %	W	^{JP} 29%	Taf	^{JP} 15%	7.7		15%	Tal.
Frequently	19	28 ⁹	7.7	^{JP} 20%	7.7	^{JP} 16%	7.7	^{JP} 2%	*	71.	28%	J. JP
Always	5%	2%	Z	4%	7-5	4%	}-i	5%	ń	چالے }-ن	21%	⊯H US IN JP

By Key Country

Doctors



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

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



Back to home

Use clinical-specific Al 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	5/-5	9%	ţ'i	√	المرآ	\rightarrow \frac{\rightarrow 1}{\rightarrow 1}	t i
Rarely	27 ⁶	19	Å	32%	Ü	Ť	Too few res	か ponses	ť.
Occasionally	32%	289	TAT	36%	W	TAT	分	1	TATE OF THE PARTY
Frequently	18	22	7.7	<mark>20</mark> %	5.7	7.77	-/- }-d	7.7	7.77
Always	2%	6%	Z/L	2%	Ţ-J	<i>}-ن</i> ا	7. ¹ .7	\ \}-3	₹ ¹ ,

By Key Country

Clinicians Doctors Nurses



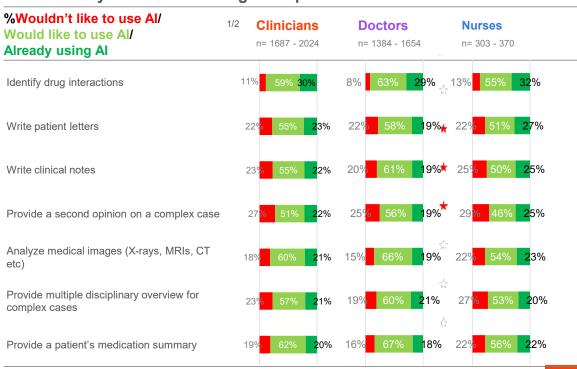
How clinicians use and would like to use Al tools in clinical practice

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



Overall

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= 2024

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

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





107

Use of AI in your clinical setting to help with tasks



Overall

Clinicians Doctors Nurses

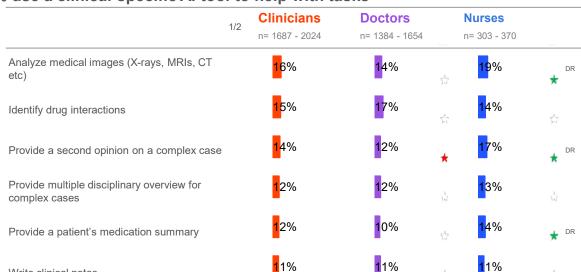
Clinicians current use of clinical-specific AI tools in practice

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

9%

12%





10%











Nurses



Write clinical notes

Write patient letters

Clinicians current use of clinical-specific Al 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 Al 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%	يار پار
Write pre-authorizations (for payers)		8%	8%	8 %	رالي آسا

Overall



Significantly higher/ lower than all clinicians

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

Fewer clinicians in Europe are using (any) Al 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 Al/Already using Al	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% <mark>30</mark> %	14% <mark>29</mark> % EU	6% 31% EU	11% <mark>2</mark> 1% *	11% <mark>33</mark> %	√ EU 12% <mark>36</mark> % √ EU
Write patient letters	22 <mark>%23</mark> %	22 <mark>%2</mark> 1%	24 <mark>%26</mark> %	28 <mark>%1</mark> 8%	19 <mark>%25</mark> %	27 <mark>%2</mark> 1%
Write clinical notes	23 <mark>%2</mark> 2%	26 <mark>%2</mark> 1%	20 <mark>% 1</mark> 7%	29 <mark>%1</mark> 8%	19 <mark>%24</mark> %	¹ EU 26 <mark>%24</mark> %
Provide a second opinion on a complex case	27 <mark>%22</mark> %	42% <mark>1</mark> 3%	20 <mark>%1</mark> 7%	37% <mark>1</mark> 1%	23 <mark>%27</mark> %	NA SA 18%34% NA SA EU
Analyze medical images (X-rays, MRIs, CT etc)	18 <mark>%2</mark> 1%	28 <mark>%1</mark> 0%	13 <mark>%1</mark> 0%	17% 17% SA NA	18 <mark>%27</mark> %	NA SA 16%13% NA SA EU MA
Provide multiple disciplinary overview for complex cases	23 <mark>%2</mark> 1%	3 3%12% ★	17% <mark>1</mark> 4%	24 <mark>%1</mark> 4%	22 <mark>%26</mark> %	★ NA SA 15%23% NA SA EU
Provide a patient's medication summary	19 <mark>%2</mark> 0%	24 <mark>%1</mark> 6% _{EU}	12% <mark>1</mark> 5%	22 <mark>%1</mark> 0%	18 <mark>%24</mark> %	NA SA EU NA EU

By Region

Clinicians

Doctor

Nurse



Question: Are you using an Al 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 Al tools in clinical practice

Fewer clinicians in Europe are using (any) Al 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 Al/Already using Al	Clinicians North Ame n= 1687 - 2024 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 <mark>% 1</mark> 7%	26 <mark>% 1</mark> 6%	20 <mark>% 1</mark> 3%	33% <mark>8</mark> %	21 <mark>%2</mark> 0%	★ EU 16 <mark>%2</mark> 0%
Make clinical decisions	3 <mark>7% 1</mark> 6%	الم 4 9%<mark>1</mark>3%	27 <mark>% 1</mark> 4%	★ 46% <mark>1</mark> 1%	3 <mark>3%1</mark> 8%	NA 82%18% EU

By Region

Clinicians

Doctors

How clinicians use clinical-specific Al 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 Al tool to help with tasks



By Region

Clinicians

Docto



How clinicians use clinical-specific Al tools in clinical practice

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



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



By Region

Clinicians

Doctors

How doctors use and would like to use Al tools in clinical practice

Fewer doctors in Europe are using (any) Al tools for tasks than globally (1/2)



Use of AI in your clinical setting to help with tasks



%Wouldn't like to use Al/Already using Al	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% <mark>29</mark> %	8% <mark>25</mark> %	8% 37% * NA EU	9% <mark>22</mark> % 🛨	7% <mark>30</mark> % 🕏	EU
Provide multiple disciplinary overview for complex cases	19 <mark>% 2</mark> 1%	31% <mark>1</mark> 1%	23 <mark>%1</mark> 9% 🕏	27 <mark>%1</mark> 4% *	13% <mark>26</mark> % 🛨	NA EU 12%2 %
Write patient letters	22 <mark>% 1</mark> 9%	18 <mark>%1</mark> 7%	32%29% * NA EU	26 <mark>%1</mark> 4% *	20 <mark>%21</mark> % 🕏	23 <mark>%1</mark> 7%
Analyze medical images (X-rays, MRIs, CT etc)	15% <mark>1</mark> 9%	24 <mark>%1</mark> 2%	19 <mark>%1</mark> 2% *	16 <mark>%1</mark> 5% 🍀	12% <mark>24</mark> % *	NA SA
Write clinical notes	20% <mark>1</mark> 9%	21 <mark>%1</mark> 5%	23 <mark>%2</mark> 1% 🛣	28 <mark>%1</mark> 5%	16 <mark>%2</mark> 1% 👼	EU ∑√.7
Provide a second opinion on a complex case	² 25 <mark>% 1</mark> 9%	35% <mark>1</mark> 3%	33%1 <mark>7</mark> %	38% 9% *	17 <mark>%23</mark> % *	NA ★ NA SA EU AF
Provide a patient's medication summary	16% <mark>1</mark> 8%	16 <mark>%1</mark> 3%	20 <mark>%1</mark> 7%	21% 9% *	12% <mark>22</mark> % *	na ^{EU} 18 <mark>%1</mark> 8%

By Region

Clinicians D

Doctors

Nurses



Question: Are you using an Al 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 Al tools in clinical practice

Fewer doctors in Europe are using (any) Al tools for tasks than globally (2/2)



Use of AI in your clinical setting to help with tasks



%Wouldn't like to use Al/Already using Al	Doctors North America n= 1384 - 1654 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 <mark>% 1</mark> 7%	19 <mark>% 1</mark> 4%	23 <mark>%1</mark> 7%	28% <mark>1</mark> 1%	17 <mark>%2</mark> 1%	⊯ J MA 22 <mark>%1</mark> 0%
Make clinical decisions	34% <mark>1</mark> 7%	49% <mark>1</mark> 1%	ี่ที่≜ี EU 38% <mark>2</mark> 1%	★ 46% 9%	25 <mark>%2</mark> 0%	* NA EU 35%18%

By Region

Doctors

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

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



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



•	•										
1/2	Doctors 2 n= 1384 - 1654	North <i>n</i> = 138 - 10	America	South A n= 107 - 12		Europ n= 214 -		Asia Pa n= 827 - 9		Middle Eas	t & Africa
Identify drug interactions	17%	17%	T.	<mark>22</mark> %	다. FU	13%	75	<mark>17</mark> %	J.,	<mark>1</mark> 5%	يار پائ
Analyze medical images (X-rays, MRIs, Cetc)	1 <mark>4</mark> %	10%	رائر آرم	6%	*	11%	J-J	18%	NA SA ★EU MA	7%	آم. آم
Provide multiple disciplinary overview for complex cases	<mark>1</mark> 2%	9%	Ü	11%	ជ	7%	*	<mark>1</mark> 5%	± EU	1 <mark>2</mark> %	1/3
Provide a second opinion on a complex of	case <mark>1</mark> 2%	8%	14	10%	EU	4%	*	<mark>1</mark> 4%	NA ★ EU	19%	NA SA ★ EU
Write clinical notes	<mark>1</mark> 1%	10%	7,4	12%)./)./	7%	*	<mark>1</mark> 4%	EU \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	10%	_/L_ }af
Provide a patient's medication summary	10%	9%	55	9%	5.5	6%	*	<mark>1</mark> 2%	Ę. EU	8%	51-J
Make clinical decisions	<mark>1</mark> 0%	6%		15%	★ NA EU	4%	*	<mark>1</mark> 2%	J. EU	10%	EU

By Region

Clinicians Doctors Nurses

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

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



% use a clinical-specific Al 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 Eas	st & Africa
Write patient letters		9%	10%	ţ,	5%	\$5	7%	1	9%	75	8%	<u> </u>
Write pre-authorizations (for payers)		8%	7%	الح آجا	6%	J-J	6%	الح أبرأ	<mark>1</mark> 0%	[-]	5%	- J- J

Clinicians Doctors Nurses

Significantly higher/ lower than all doctors

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

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





Use of Al in your clinical setting to help with tasks

%Wouldn't like to use Al/Already using Al	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% <mark>32</mark>	19 <mark>%34</mark> %	} }	13% <mark>2</mark> 0%	14% <mark>36</mark> %	プ EU 15% <mark>41%</mark> プ EU
Write patient letters	22 <mark>%</mark> 27	27% <mark>26</mark> %	ران آدی	29% <mark>23</mark> %	18 <mark>%29</mark> %	^{ታን} 3 <mark>2%26</mark> %
Write clinical notes	25% <mark>2</mark> 5	31% <mark>27</mark> %	that Too few responses	30% <mark>21</mark> %	23 <mark>%28</mark> %	ో: 30% <mark>27</mark> %
Provide a second opinion on a complex case	29% <mark>2</mark> 5	49% <mark>1</mark> 2%	1 N	3 <mark>6%1</mark> 5%	28 <mark>%30</mark> %	$\begin{array}{cccccccccccccccccccccccccccccccccccc$
Analyze medical images (X-rays, MRIs, CT etc)	22 <mark>%</mark> 23	32% <mark>8</mark> %	7N.7	18% <mark>20</mark> %	NA 25 <mark>%30</mark> %	√ NA 16%22%
Provide a patient's medication summary	22 <mark>%2</mark> 2	31% <mark>1</mark> 9%	<u> </u>	22 <mark>%1</mark> 1%	24 <mark>%26</mark> %	が EU 19 <mark>%31</mark> % だ EU
Provide multiple disciplinary overview for complex cases	27 <mark>%</mark> 2(3 <mark>6%1</mark> 3%	10% <mark>1</mark> 0%	21 <mark>%1</mark> 3%	3 <mark>1%26</mark> %	₩ NA EU 19 <mark>%25</mark> %

By Region

Clinicians

Doctor



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

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





Use of Al in your clinical setting to help with tasks

%Wouldn't like to use Al/Already using Al	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 <mark>% 1</mark> 7%	3 <mark>2%18</mark> %	75	3 <mark>9%</mark> 5%	24 <mark>%1</mark> 9%	\$\frac{10\%}{29\%}\$ EU
Make clinical decisions	4 <mark>0%1</mark> 5%	49% <mark>1</mark> 4%	Too few responses	47% <mark>1</mark> 3%	4 <mark>1%1</mark> 7%	ਹੈ 28 <mark>% 1</mark> 9%

By Region

Clinicians

Doctors



Nurses current use of clinical-specific Al 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 Al tool to help with tasks



•	-									
1/2	Nurses n= 303 - 370	North Am n= 65 - 78	erica	South America n= 24 - 30	Europe n= 42 - 6		Asia Pa n= 141 - 1		Middle Eas n= 31 - 34	t & Africa
Analyze medical images (X-rays, MRIs, CT etc)	19%	6%	*		17%	پار پار	<mark>23</mark> %	N/	22%	NA
Provide a second opinion on a complex case	17%	8%			8%	را آما	<mark>22</mark> %	N/ EU		ر اسا
Identify drug interactions	14%	<mark>22</mark> %	AP	Too few responses	15%	ψ	<mark>1</mark> 1%	ដ	<mark>26</mark> %	AP
Provide a patient's medication summary	<mark>1</mark> 4%	<mark>1</mark> 1%	1		10%	W	<mark>17</mark> %	14	16%	14
Provide multiple disciplinary overview for complex cases	13%	9%	1.7		9%	7.1	<mark>17</mark> %	S/	16%	SA Jai
Write patient letters	<mark>1</mark> 2%	15%	ţ,		13%	7.7	<mark>1</mark> 0%	75	<mark>16</mark> %	75
Write clinical notes	<mark>1</mark> 1%	<mark>1</mark> 3%	ر الر أما		13%	1	<mark>1</mark> 2%		9%	الح أسماً

By Region

Clinicians

Docto



Nurses current use of clinical-specific Al 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 Al tool to help with tasks



	2/2	Nurses n= 303 - 370	North A n= 65 - 78		South America n= 24 - 30	Europ n= 42 -		Asia Pa n= 141 - 1		Middle East & Africa	
Make clinical decisions		10%	12%	5 5	Too few responses	9%	75	<mark>1</mark> 1%	泛	9%	75
Write pre-authorizations (for payers)		8%	10%	را. ادآ		3%	ران آما	8%	Jr.J	16%	EU

By Region

Clinicians

Doctors



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

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



Use of AI in your clinical setting to help with tasks

%Wouldn't like to use Al/Already using Al	Clinicians n= 1687 - 2024	USA n= 189 - 216		China n= 423 - 459		ndia = 244 - 274		Japan n= 141 - 160		UK n= 53 - 102		Brazil = 84 - 104	062,0
Identify drug interactions	11% <mark>30</mark> %	15% <mark>29</mark> %	JP	3% <mark>46%</mark>	US IN JP UK BR	19 <mark>%25</mark> %	JP	15% <mark>1</mark> 2%	*	5% 20%	*	7% <mark>34</mark> %	JP UK,_
Write patient letters	22 <mark>% 23</mark> %	22 <mark>% 1</mark> 8%	JP	14% <mark>30</mark> %	US JP UK 🛨	26% <mark>25</mark> %	JP	17%10%	*	19%16%	رائے آبا	27% <mark>29</mark> %	US JP UK
Write clinical notes	23 <mark>% 22</mark> %	28 <mark>% 1</mark> 7%	JP	9% <mark>31</mark> %	US IN JP UK 🛊 BR	29% <mark>22</mark> %	JP	14% 5%	*	22%18%	JP	22% <mark>21</mark> %	JP
Provide a second opinion on a complex case	2 <mark>7% 22</mark> %	4 <mark>0% 1</mark> 2%	*	11% <mark>37</mark> %	US IN JP UK 🛊 BR	35% <mark>1</mark> 9%	US JP	31% 6%	*	45% <mark>1</mark> 8%	JP	21% <mark>1</mark> 8%	JP
Analyze medical images (X-rays, MRIs, CT etc)	18 <mark>% 21</mark> %	3 <mark>1%1</mark> 0%	*	12% <mark>37</mark> %	US IN JP UK 🛨 BR	28%21%	US BR	17% <mark>1</mark> 5%	5.7	23 <mark>% 1</mark> 5%	7.7	13% 7%	*
Provide multiple disciplinary overview for complex cases	23 <mark>% 2</mark> 1%	3 <mark>2% 1</mark> 3%	*	17 <mark>%36</mark> %	US IN JP UK 🛨 BR	29%14%	*	24 <mark>%1</mark> 7%	UK	36% 8%	*	18% <mark>1</mark> 9%	UK
Provide a patient's medication summary	19 <mark>% 2</mark> 0%	21 <mark>%1</mark> 7%	JP	9% <mark>35</mark> %	US IN JP UK 🛨 BR	31% <mark>1</mark> 7%	JP	18% 4%	*	20%12%	J₽	12% <mark>1</mark> 9%	JP

By Key Country

Clinicians

Doctor



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

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



Back to

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use Al/Already using Al	Clinicians 2 n= 1687 - 2024	USA n= 189 - 216		China n= 423 - 459		ndia = 244 - 274		Japan n= 141 - 160		JK n= 53 - 102		Brazil n= 84 - 104		Ba h
Write pre-authorizations (for payers)	23 <mark>% 1</mark> 7%	25 <mark>% 1</mark> 4%	JP	11% <mark>28</mark> %	US IN JP UK 🛨 BR	31% <mark>1</mark> 6%	JP UK	18% 5%	*	49% 4%	*	21 <mark>% 1</mark> 4%	JP	
Make clinical decisions	3 <mark>7% 1</mark> 6%	48% <mark>1</mark> 4%	UK	26 <mark>%25</mark> %	US IN JP UK 🛨	41% 11%	*	28% <mark>1</mark> 0%	7.7	53% 6%	*	25% <mark>1</mark> 6%	UK	

By Key Country

Clinicians



Clinicians current use of clinical-specific Al 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)



Back to

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

													home
1/2	Clinicians n= 2024	USA n= 216	062,0	China n= 459	OEZ, Ú	India n= 274	162,0	Japan n= 160	000,11	UK n= 102	0 E.D., Cd	Brazil n= 104	862,0
Analyze medical images (X-rays, MRIs, CT etc)	<mark>1</mark> 6%	9%	*	30%	US IN JP UK BR	12%	بال كبار	^{BR} 14%	₹UT	^R 12%	7.J	5%	*
Identify drug interactions	<mark>1</mark> 5%	<mark>20</mark> %	- Jr.J	IN 18%	IN JP	13%	رام آما	^{JP} 2%	*	13%	JF	20%	JP Jej
Provide a second opinion on a complex case	14%	9%	TÅ.	<mark>30%</mark>	US IN JP UK BR	7%	*	4%	*	7%	*	12%	J₽
Provide multiple disciplinary overview for complex cases	<mark>1</mark> 2%	10%	14	^{IN} <mark>26</mark> %	US IN JP UK BR	4%	*	9%	W.	^N 5%	*	7%	- A- Inf
Provide a patient's medication summary	<mark>1</mark> 2%	11%	7.7	^{JP} 22%	US IN JP UK BR	9%	7.7	3%	*	9%	JE Na	7%	J.T.
Write clinical notes	<mark>1</mark> 1%	11%	7.5	^{JP} 15%	★ JP	12%	7.5	^{JP} 2%	*	11%	JF	8%	JP
Write patient letters	10%	10%		^{JP} 9%	JP	11%	H	JP 4%	*	11%	J.J.	10%	JA JP

Base: n= 2024

By Key Country

Clinicians

Doctor



Clinicians current use of clinical-specific Al 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)



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



	2/2	Clinicians n= 2024	USA n= 216	862) O	China n= 459	oral n	India n= 274	962, 3	Japan n= 160	06.21,61	UK n= 102	ocz) ပ	Brazil n= 104	ಕರನ್ನರ
Make clinical decisions		10%	10%	ţ,	^{UK} 18%	US IN	6%	*	6%	t5	2%	*	11%	UK
Write pre-authorizations (for payers)		8%	8%	7.7	1 <mark>3</mark> %	JP UK BR	7%	713	2%	*	1%	ر اد آ	3%	ار آدیا

By Key Country

Clinicians

Doctors



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

Significantly more doctors in China are using (any) Al tools for tasks than globally (1/2)



Use of Al in your clinical setting to help with tasks

%Wouldn't like to use Al/Already using Al	Doctors n= 1384 - 1654	USA n= 129 - 145		China = 368 - 402		dia : 217 - 240		Japan n= 115 - 134		UK n= 36 - 74		Brazil n= 69 - 83	06.0, 0
Identify drug interactions	8% <mark>29</mark> %	9% <mark>26</mark> %	IN JP	1% <mark>45%</mark>	US IN JP UK	14%16%	JP ★	7% 9%	*	7% 17%	*	9% 39%	IN US JP UK
Provide multiple disciplinary overview for complex cases	19 <mark>% 21</mark> %	29% 12%	*	5% <mark>37</mark> %	US IN JP UK BR	24 <mark>%1</mark> 4%	*	11% <mark>1</mark> 7%	حالے ا-ن	38% 9%	*	25% <mark>23</mark> %	US UK
Write patient letters	22 <mark>% 19</mark> %	16 <mark>% 1</mark> 6%	ú	17 <mark>%27</mark> %	US IN JP UK 🛊	25%1 5%	ú	14% 9%	*	21%11%	ń	30% <mark>29</mark> %	IN US JP UK
Analyze medical images (X-rays, MRIs, CT etc)	15% <mark>1</mark> 9%	24 <mark>%1</mark> 1%	*	4% <mark>37</mark> %	US IN JP UK 🜟 BR	23% 11%	*	7% <mark>1</mark> 2%	*	26% 9%	*	16% 9%	*
Write clinical notes	20% 19%	21 <mark>%1</mark> 5%	JP	8% <mark>26</mark> %	US IN JP UK 🛨	24%1 6%	JP	11% 5%	*	34% 8%	*	24% <mark>2</mark> 1%	JP UK
Provide a second opinion on a complex case	25 <mark>% 19</mark> %	3 <mark>4%1</mark> 3%	JP	5% <mark>34</mark> %	US IN JP UK 🛨 BR	30%11%	*	19 <mark>%</mark> 6%	*	49% 6%	*	30% <mark>1</mark> 6%	JP UK _≸ .j
Provide a patient's medication summary	16% <mark>1</mark> 8%	15% <mark>1</mark> 3%	JP	4% <mark>33</mark> %	US IN JP UK ★ BR	21%1 3%	JP	13% <mark>5</mark> %	*	19% 6%	*	19 <mark>% 1</mark> 9%	JP UK

By Key Country

Doctors



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

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



Back to

home

Use of AI in your clinical setting to help with tasks



By Key Country

Doctors



Doctors current use of clinical-specific Al 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)





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

													Home
1/2	Doctors n= 1654	USA n= 145	0E2), D	China n= 402	0 E 2 E	India n= 240	162, 3	Japan n= 134	062(-7)	UK n= 74	0 E.D., EJ	Brazil n= 83	06.00 ₁ to
Identify drug interactions	17%	18%	75	IN 26 %	US IN	11%	*	3%	*	13%	JF	<mark>26</mark> %	IN JP
Analyze medical images (X-rays, MRIs, CT etc)	14%	10%	ران آریا	<mark>26</mark> %	US IN JP UK BR	10%	J. J	10%	J-J	8%	ζ [/] -j	4%	*
Provide multiple disciplinary overview for complex cases	12%	10%	ħ	<mark>22</mark> %	US IN JP UK	8%	ħ	5%	*	7%	ជ	14%	JP
Provide a second opinion on a complex case	12%	9%	14	^{JP} 23%	US IN JP UK BR	8%	-A- las	^{JP} 2%	*	3%	*	10%	JP
Write clinical notes	11%	10%	7.7	^{JP} 17%	IN JP UK	11%	747	^{JP} 4%	*	4%	7.7	<mark>1</mark> 1%	JP
Provide a patient's medication summary	10%	9%	75	^{JP} 19%	US IN	7%	75	^{JP} 2%	*	4%	75	10%	JP
Make clinical decisions	10%	7%		19%	★ US IN	6%	al.	5%	1	1%	*	17%	US IN JP

By Key Country

Clinicians Doctors Nurses



Doctors current use of clinical-specific Al 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 Al tool to help with tasks

	2/2	Doctors n= 1654	USA n= 145	8C.2\O	China n= 402	ಂದ್ಯಾಬ	India n= 240	ec ವ್ಯ.ವ	Japan n= 134	ocz) j	UK n= 74	0೭೨ ೮	Brazil n= 83	ecz, u
Write patient letters		9%	10%	ţ,	<mark>1</mark> 2%	J B	7%	ţ,	4%	같.	6%	t)	4%	7
Write pre-authorizations (for payers)		8%	8%	J-]	15%	US I	6%		4%	J-J	3%		6%	الح آسل

By Key Country

Clinicians

Doctors



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

Nearly half (47%) of nurses in China use (any) Al 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 Al/Already _{1/2} n	Nurses n= 303 - 370	USA n= 60 - 73		China = 55 - 58		ndia = 27 - 35	Japan n= 25 - 29	UK n= 17 - 30	Brazil n= 15 - 21	062,0
Identify drug interactions	13% <mark>32</mark> %	22 <mark>%33</mark> %). }./	5% <mark>47%</mark>	*	24 <mark>%</mark> 32%	<u>, , , , , , , , , , , , , , , , , , , </u>). -	\r 	71,
Write patient letters	22 <mark>% 27</mark> %	29% <mark>2</mark> 0%	ر آبرا	11% <mark>33</mark> %	ر الر ارس(28% <mark>34</mark> %	5 ¹¹ -3	رام احرا	ار اس	رار (م)
Write clinical notes	25 <mark>% 25</mark> %	3 <mark>5%20</mark> %	Ü	11% <mark>36</mark> %	US	3 <mark>4%</mark> 29%		ů	7. ¹ 7	ń
Provide a second opinion on a complex case	29% <mark>25</mark> %	47%11%	*	18 <mark>%40%</mark>	US *	39% <mark>27</mark> %	US J _A	Too few response	9 S - 1√√	14
Analyze medical images (X-rays, MRIs, CT etc)	22 <mark>% 23</mark> %	38% 9%	*	21 <mark>%37</mark> %	us ★	3 <mark>2%</mark> 29%	US N	5.7	7 ¹ 7	7.7
Provide a patient's medication summary	22 <mark>% 22</mark> %	29% <mark>21</mark> %	55	15 <mark>%36</mark> %	*	4 <mark>1%</mark> 21%	ţ5	\	}	7.5
Provide multiple disciplinary overview for complex cases	27 <mark>% 20</mark> %	35%15%	W.	29 <mark>%34</mark> %	US IN	35% 13%	-11-7 1	e.l. Jod	J. J	14

By Key Country

Clinicians

Doctor

Nurses



Question: Are you using an Al 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

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

Nearly half (47%) of nurses in China use (any) Al 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 Al/Already_using Al	Nurses /2 n= 303 - 370	USA n= 60 - 73		China = 55 - 58		dia 27 - 35	Japan n= 25 - 29	UK n= 17 - 30	Brazil n= 15 - 21	OCZ, ©
Write pre-authorizations (for payers)	26 <mark>% 1</mark> 7%	3 <mark>5% </mark> 3%	1,5	13% <mark>24</mark> %	77		t'r	\$ ⁵	分	7.7
								Too few response	s	
Make clinical decisions	4 <mark>0% 1</mark> 5%	47% <mark>1</mark> 7%	7.7	4 <mark>2%</mark> 21%	7-7	41% 13%		- JI - j		7-7

By Key Country

Clinicians

Doctors

Nurses current use of clinical-specific Al 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)



Back to

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

										home
1/2	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	<mark>1</mark> 5%	15	7.J	يار آ	7L
Provide a second opinion on a complex case	17%	9%	7.7	37%	US IN	6%	5)rJ	∑	7-7
Identify drug interactions	14%	<mark>22</mark> %	Ü	<mark>1</mark> 1%	T.	15%	Ü	7/7	Too few responses	Ji.
Provide a patient's medication summary	<mark>1</mark> 4%	<mark>1</mark> 3%	14	<mark>25</mark> %	*	12%	W	l _A /	13%	1. J.
Provide multiple disciplinary overview for complex cases	<mark>1</mark> 3%	<mark>1</mark> 1%	ŽAŤ	29%	ws in	0%	*) _N	7 L. }a/	1/1/
Write patient letters	<mark>1</mark> 2%	11%	چالے آپ	7%	\$7	16%	الـ إيرا	\$	\rl_ \rac{1}{2}	}-7
Write clinical notes	<mark>1</mark> 1%	<mark>1</mark> 1%	J.	13%	ر آسار	14%	W.	~	- Al- 	جار آبرا

By Key Country

Clinicians Doctors Nurses



Question: Are you using an Al 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 Al 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 Al tool to help with tasks

	2/2	Nurses n= 370	USA n= 73	8C3, O	China n= 58	oca) ಪ	India n= 35	8CD, 3	Japan n= 29	UK n= 30	0CZI C)	Brazil n= 21	0CZ, C)
Make clinical decisions		10%	14%	75	18%	7,7	6%	5	Too few res	snonses	? <u>?</u>		75
Write pre-authorizations (for payers)		8%	8%	- N	<mark>1</mark> 1%			J-]	ار آناد آناد	эропосо	[r]		راني آرا

By Key Country

Clinicians

Doctors



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)





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1/2	Clinicians	Doctors	Nurses	
·	N= 2206	N= 1781	N= 425	00.00
Automatically cites references (transparency)	68%	71%	NU 64%	*
Ensures confidentiality of input data (security)	65%	66%	64%	5.7
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?

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)





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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 mplementation (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%	54
Other (please specify)	4%	3%	4%	جال _ح ا
Don't know / Not applicable	3%	3%	<u>4</u> %	



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?

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)



	Clinicians	North America	Courth America	Europo	Asia Pacific	Middle East & Africa
1/2	n= 2206	North America n= 268	South America n= 164	Europe n= 439	n= 1170	n= 147
Automatically cites references (transparency)	68%	73% EU AP	81% 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%		61%
Utilizes the latest resources (recency)	64%	68% a.	70% -↓√	53%	67%	64% EU
Trained for factual accuracy, morality, and safety (safety)	63%	75%	60%	59%	64%	54% ★
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	61%	AP MA 68% ★	71% ★	64% ₅₅	56% ★	56%
Integrates with electronic health records to incorporate a patient's medical history (personalized)	60%	59% ☆	67% ☆	57% ೄ	61% _(*)	58%



Clinicians

Doctor

Nurses



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	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa
Clear accountability for provided information (responsibility)	59%	65% AF	60% j	59% _j	57%	60% J
Guidance is provided for using outputs in a clinical setting (training)	57%	60% dis	55% ₋ -	49%	61% July	60% EU
Abides by laws governing development and implementation (legality)	57%	63% ∜	65% ★ ^{EU}	4 9% ★	57% ⅓	EU 59% ☆
Delivers coherent clinical outputs in complex situations (quality model output)	56%	57%	67% ★ AP MA	51% ¹	57% ਹੈ√	54%
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	56%	61% The EU	58%	49% *	58%	54% 5√√
Other (please specify)	4%	6% [☆]	6% 55 EU	1% *	3%	EU 55 €
Don't know / Not applicable	3%	5%	0% *	s, 4% ⊸ √	3% [‡]	sa 5% ⊬



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?

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)



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1/2	Doctors n= 1781	North America	South America	Europe n= 358	Asia Pacific	Middle East & Africa
Automatically cites references (transparency)	71%	77% S MA	84% * AP MA	68% _{1.7}	71% չէ	65%
Trained on high-quality peer-reviewed content (quality model input)	70%	SA EU AP MA	66% %	68% d	71% 👆	66%
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	68%	MA 74% ☆	66% t	68% ∜	o 69% ∜	A 59% ★
Utilizes the latest resources (recency)	68%	69% ⅓	69% ¹ √	61% *	70%	0 68%
Trained for factual accuracy, morality, and safety (safety)	67%	78% *AP MA	60%	64%	68% s	^A 55% ★
Ensures confidentiality of input data (security)	66%	66% ⁵	69% ⁵	63% [‡]	68% ⁵	61% ⁵
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?

What would increase trust in Al tools - doctors by region



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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)

2/2	Doctors n= 1781	North America	South America n= 132	Europe n= 358	Asia Pacific	Middle East & Africa
Delivers coherent clinical outputs in complex situations (quality model output)	62%	63% _j	65% _{j.j.}	59%	64%	56%
Abides by laws governing development and implementation (legality)	62%	64%	66% ₍₋₎	56%	63%	55% ₽5
Clear accountability for provided information (responsibility)	61%	AP MA ☆	60% ‡	61% J	60% ☆	53%
Guidance is provided for using outputs in a clinical setting (training)	59%	60%	53%	55% id	61% ¹	54%
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	58%	63% 🕏	60% 조	55% ⁷ ~	58%	53%
Other (please specify)	3%	EU 5% ☆	6% ∑ EU	1%	3%	4%
Don't know / Not applicable	3%	3% ☆	1%	3%	3%	sa 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: Which of the following approaches would increase your trust in a clinical-specific AI tool?

What would increase trust in Al tools - nurses by region

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



1/2	Nurses n= 425	North America	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa Bank
Ensures confidentiality of input data (security)	64%	66% J	72% 🖫	67% Ş.J	60% JJ	76 %
Automatically cites references (transparency)	64%	70%	78% 5	58% F	62% 5.7	66%
Utilizes the latest resources (recency)	61%	67% ♯ ^{EU}	71% ♯ ^{EU}	46 % ★	65%	ti 61% ☆
Trained on high-quality peer-reviewed content (quality model input)	60%	69%	50%	55% ¹	62%	55%
Trained for factual accuracy, morality, and safety (safety)	59%	72% * EU	60% T.	55% J.	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%	66% ¹ EU

Base: n= 425



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?

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



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	Nurses	North A	merica	South A	merica	a Europ	oe	Asia Pa	ncific	Middle East 8	Africa
2/2	n= 425	n= 92	0C2\ D	n= 32	0.020	n= 81	962 <u>.</u> D	n= 180	003) 01	n= 38	002,03
Integrates with electronic health records to incorporate a patient's medical history (personalized)	56%	56%	វែ	69%	17	51%	ţ.	57%	7,	53%	Ĭ.,
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	54%	59%	EU jrj	56%	راني آجي	43%	7-7	57%	EU [-]	55%	رائ _ي آبرا
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	53%	62%	AP	75%	*	61%	AP	44%	*	53%	ī.,
Abides by laws governing development and implementation (legality)	52%	62%	↓ EU	65%	TA E	42%	14	51%	14	63%	₩ EU
Delivers coherent clinical outputs in complex situations (quality model output)	50%	51%	Jai	69%	★ 5	43%	1/2	49%	7.4	53%	7.67
Don't know / Not applicable	4%	6%	17	0%	7-7	6%	ا آما	3%	<u> </u>	5%	<u> </u>
Other (please specify)	4%	6%	Ñ	6%	يار ايما	1%	M	4%	L/1	8%	W.
								By R	egion		
								Do	otore	Nurse	C

Base: n= 425

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?

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)





											home
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 73%	± JF	59%	*	58%	*	64%	84%	CH US IN JP UK
Ensures confidentiality of input data (security)	65%	64%	64%	1	60%		62%	دار آما	81% dis ch	75%	CH US
Trained on high-quality peer-reviewed content (quality model input)	65%	72% ★	JP BR 71%	↓ JF BF	63%	j Ç	48%	*	77% 🛧 IN JE		13
Utilizes the latest resources (recency)	64%	68% J	70%	JF ★	69%	12	60%	IN	72% - 1.5	74%	JP ★
Trained for factual accuracy, morality, and safety (safety)	63%	75% 🛨	CH IN JP BR 67%	JF	62%	J	53%	*	81% ± IN JF	62%) _A (
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	61%	67% 🕏	CH IN JP 58%	55	52%	*	53%	<u> </u>	80% ± IN JF	76%	CH ★IN JP
Integrates with electronic health records to incorporate a patient's medical history (personalized)	60%	59%	66%	★ JF		, i	51%	*	74% ★ IN JF		JP

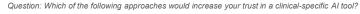
Base: n= 2206

By Key Country

Clinicians Doctors Nurses

Significantly higher/ lower than all clinicians

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



142

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)





143

											home		
2/2	Clinicians n= 2206	USA n= 247		China n= 481		India n= 292		Japan n= 170		UK n= 109		Brazil n= 108	*CD, D
Clear accountability for provided information (responsibility)	59%	63%	7,7	^{JP} 58%	17	57%	پار کار	52%	Ĭ1,	76%	US CH	65%	JP
Guidance is provided for using outputs in a clinical setting (training)	57%	58%	F.7	65%	US *	IN JP 57% BR	7/3	48%	*	68%	JP ★ BR	53%	Z ⁱ li
Abides by laws governing development and implementation (legality)	57%	64%	*	IN 64%	*	IN 49%	*	46%	*	67%	IN JP	75%	CH ★IN JP
Delivers coherent clinical outputs in complex situations (quality model output)	56%	57%	L.	JP 64%	*	IN 49%	*	47%	*	65%	IN JP	68%	IN JP
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	56%	61%	7/1	JP 62%	*	IN 54%	ا کیا	40%	*	61%	JP	63%	JP
Other (please specify)	4%	6%	الح. أبار	CH JP 1%	*	9%	★ JP U	0%	*	2%	<u>کالے</u>	7%	CH ★ JP
Don't know / Not applicable	3%	5%	Ä	CH UK BR 0%	*	3%	C I	6%	★ U	Κ	4	0%	ران آما

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?

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)





144

											home
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% Ju Je ul	₹ 77% _★ JF	uk 65%	*	64%	1,7	64%		86%	IN JP
Trained on high-quality peer-reviewed content (quality model input)	70%	80% ± JI	78%	JP BR	JF Jr.J	50%	*	76%	JP	64%	JP
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	68%	74% 🖔 Ji	^{74%} ★	IN 64%	ů	61%	ά	76%	JP	74%	JP
Utilizes the latest resources (recency)	68%	68% 12/	77% 🛊	66%	JF	54%	*	67%		69%	JP
Trained for factual accuracy, morality, and safety (safety)	67%	79% 🛨 📙	₹ 75% ★	IN 64%	يال إما	57%	*	85% 🛨	IN JP BR	67%	7.7
Ensures confidentiality of input data (security)	66%	67% \$	74% 🛨	IN 64%	چالے آپ	54%	*	74% 🕏	JP	76%	IN JP
Integrates with electronic health records to incorporate a patient's medical history (personalized)	65%	63% 🕏	75% ★	65%	JF JA	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?

What would increase trust in Al 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)





145

																Back to
	Doctors n= 1781	USA n= 160	6C2, O		nina 421	ودی <u>ن</u>	India n= 257	, (C2), 3		Japan n= 137	0620/17		UK n= 78	ော့	Brazil n= 85	862), U
Delivers coherent clinical outputs in complex situations (quality model output)	62%	61%	يار آمار	JP	74%	US II	55%	*		48%	*		62%	يال آما	71%	IN JP
Abides by laws governing development and implementation (legality)	62%	66%	5 ^N −3	JP	72%	★ J	59%	ار ار		50%	*		77%	IN JP	75%	IN JP
Clear accountability for provided information (responsibility)	61%	68%	Ü	JP 6	3%	J T	60%	7		52%	*		78%	CH ★ IN JP	69%	JP
Guidance is provided for using outputs in a clinical setting (training)	59%	60%	las	6	3%	J	60%	1		53%	la/		64%	The state of the s	54%	14
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	58%	64%).T	JP 6	3%	J \./	57%	ال إماً	JP	43%	*		62%	JP	61%	JP
Other (please specify)	3%	4%		2%	, 0	를	6%	*	CH JP	1%	55		4%	7-7	6%	JP
Don't know / Not applicable	3%	3%	ر الر أسما	о%	, 0	*	4%	رار اسا	СН	7%	*	CH UK BR	0%	ħ.	0%	ħ

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 Al tool?

Base: n= 1781

What would increase trust in Al 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)





												home home
1/2	Nurses n= 425	USA n= 87	46.0),0	China n= 60	0£2, G	India n= 35	462) 3	Japan n= 33	0620,03	UK n= 31		Brazil n= 23
Ensures confidentiality of input data (security)	64%	61%	7.7	55%	7,7	57%	듔	70%	7,7	87% 🛨 ^{US}	S CH IN	T.
Automatically cites references (transparency)	64%	66%	Z ^I	68%	5/-5	54%	J-1	52%	5-3	65%		ţ,
Utilizes the latest resources (recency)	61%	68%	77	63%	Û	71%	ħ	67%	T.	77% ☆		Too few responses
Trained on high-quality peer-reviewed content (quality model input)	60%	64%	14	65%	12	60%	la/	45%	W.	77% ਨੂੰ	JP	-1
Trained for factual accuracy, morality, and safety (safety)	59%	71%	*	JP 60%	7.7	60%	ال أما	48%	7.4	77% 🛨	JP	1/17
Clear accountability for provided information (responsibility)	57%	59%	جالے آپ	53%	J-J	54%	J-7	52%	75	74% \$		\frac{1}{2}
Guidance is provided for using outputs in a clinical setting (training)	56%	55%	Jr.J	67%	T	JP 54%	J.	42%	T.	71% 🕏	JP	ដែ

Base: n= 425

By Key Country

Clinicians Doctors Nurses

146

What would increase trust in Al 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)



147

													Back to
2/2	Nurses n= 425	USA n= 87	162,0	China n= 60	062,6	India n= 35	862 ₁ 3	Japan n= 33	002/3	UK n= 31	01.27 E	Brazil n= 23	home
Integrates with electronic health records to incorporate a patient's medical history (personalized)	56%	55%	بال _ي آبراً	57%	ار در	51%)L	61%	يار ال	74%	*		يال _ي پاڻ
Eliminates bias in training data (e.g. considers gende and ethnic differences) (fairness)	r 54%	59%	<u> </u>	62%	JI J-J	51%	ر آمار	36%	5/3	61%	JP		<u> </u> -J
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	53%	60%	CH	^{IN} 42%	Ü	40%	ů	45%	ú	84°	% dus ch ★ IN JP	Too few r	esponses
Abides by laws governing development and implementation (legality)	52%	62%	IN	55%] _A /	40%	W	42%	JL Jaj	58%	M		IN.
Delivers coherent clinical outputs in complex situations (quality model output)	50%	53%	_/L_ }_\(53%	7,7	43%) _{\(\inf}	45%	7,7	68%	IN		<u> </u>
Don't know / Not applicable	4%	7%		о %	J-1	3%	Ş-i	6%	Ž.J.	0%	7.7		<u> </u>
Other (please specify)	4%	7%	- JI- 	он 0%		11%		CH JP	, i	0%			J.

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

The future of healthcare



Over half of clinicians believe that, in the next 2-3 years, Al 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)

Base: n= 2091 - 2120



%Disagree/Agree	1/2	Clinicians n= 2091 - 2120	Doctors n= 1687 - 1710	-	Nurses = 402 - 412	ಂದ್ರಾವ
Al will analyze all medical images to identify abnormalities		23 <mark>% 56%</mark>	24 <mark>%</mark> 59%	J-J	22 <mark>% 54%</mark>	<u>ئار</u>
Healthcare costs are higher (in real terms)		3 <mark>0% 53%</mark>	21 <mark>%</mark> 59%	★ NU	3 <mark>8% 47%</mark>	★ NU
Hospital stays are shorter		24 <mark>% 51%</mark>	21 <mark>%</mark> 51%	IN.	28% <mark>51%</mark>	Ñ
Everyone will be able to easily access healthcare (universal healthcare)		30% <mark>51%</mark>	35% <mark>43%</mark>	*	26% 59%	*
Healthcare will be more equitable		26 <mark>% 50%</mark>	<mark>30%</mark> 39%	*	22% 62%	*
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	,	2 <mark>7% 41%</mark>	25% <mark>47%</mark>	★ NU	29% <mark>36</mark> 9	★ NU
Hospitalization rates are lower		3 <mark>7% 41%</mark>	41% <mark>32</mark> 9	*	33% <mark>50%</mark>	*

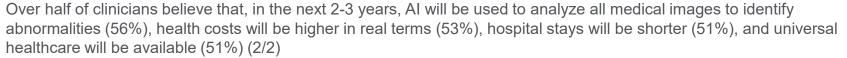
Overall

Clinicians

Doctors







Base: n= 2120



%Disagree/Agree	2/2	Clinicians n= 2091 - 2120	Doctors n= 1687 - 1710		Nurses n= 402 - 412	
Most patients will self-diagnose with Al tools available online rather than see a clinician		39% <mark>38%</mark>	42% 38%	74	35% <mark>39</mark> %	يال ا
Clinicians have less choice of which procedures and therapies a patient receives		44% <mark>32</mark> %	38% <mark>35</mark> 9	بار NU	49% <mark>30</mark>	, NU
Most healthcare will be delivered in the patient's home		40% <mark>31</mark> %	50% <mark>28</mark>	*	29% <mark>34</mark> 9	ដែ

Overall Nurses Clinicians **Doctors**

Significantly higher/ lower than all clinicians

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	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
Al will analyze all medical images to identify abnormalities	23 <mark>%</mark> 56%	23 <mark>%</mark> 55%	30% <mark>56%</mark>	19% 62% ** AP	22 <mark>%</mark> 54%	27% <mark>57%</mark>
Healthcare costs are higher (in real terms)	30 <mark>%53%</mark>	9% 74% * SA EU	26% 57%	18% 63% * AP	4 <mark>1%42%</mark>	18% 68% ** SA AP
Hospital stays are shorter	24 <mark>%51%</mark>	27% <mark>50%</mark>	31% <mark>52%</mark>	21 <mark>%52%</mark>	24 <mark>%</mark> 51%	24 <mark>%</mark> 55%
Everyone will be able to easily access healthcare (universal healthcare)	30 <mark>%51%</mark>	66%	41% <mark>47%</mark> [™] √ NA	31%47%	21 <mark>% 61%</mark>	A SA EU 28%57% EU
Healthcare will be more equitable	26 <mark>%50%</mark>	★ 53% <mark>2</mark> ′	36% 46%	32%36 ^c × NA	16 <mark>% 62%</mark>	A SA EU 23% 62% NA SA EU
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	2 <mark>7%41%</mark>	28% <mark>39</mark> 9	30% <mark>47%</mark>	24 <mark>%43</mark> %	28 <mark>%39%</mark>	22%53% *** NA EU AP
Hospitalization rates are lower	3 <mark>7%41%</mark>	★ 56% <mark>2</mark> 2	51%<mark>31</mark>% ★ NA	39%35° *** NA	30 <mark>%48%</mark>	A SA BEU 33%48% NA SA EU

Base: 2120

By Region

Clinicians

Doctor

Nurses



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.

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	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	3 <mark>9%</mark> 38%	29%50% * EU	40% <mark>48% ★ EU</mark>	45% <mark>34</mark> %	3 <mark>8%</mark> 35%	41% <mark>43%</mark>
Clinicians have less choice of which procedures and therapies a patient receives	44% <mark>32</mark> %	21%54% ** SA EU AP	42% <mark>36</mark> %	44% <mark>28</mark> %	<mark>50%</mark> 27% ★	★ EU AP
Most healthcare will be delivered in the patient's home	4 <mark>0%31</mark> %	★ 51% <mark>2</mark> 2	52% <mark>32</mark> %	40% <mark>33</mark> %	3 <mark>5%31</mark> %	NA

Base: 2120

By Region





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





%Disagree/Agree	Doctors 1/2 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 <mark>%49%</mark>	27% 60%
Al will analyze all medical images to identify abnormalities	24% 59%	22 % <mark>56%</mark>	31% <mark>52%</mark>	25 <mark>%</mark> 62%	22 <mark>%60%</mark>	29 <mark>%55%</mark>
Hospital stays are shorter	21% 51%	27 <mark>%</mark> 48%	31% <mark>46%</mark>	20%54%	18 <mark>%53%</mark>	18 <mark>%4</mark> 9%
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	25 <mark>%</mark> 47%	26% <mark>40</mark> %	37% <mark>37</mark> % ★	26%45 %	22 <mark>%51%</mark>	ya sa 28% <mark>51%</mark> sa
Everyone will be able to easily access healthcare (universal healthcare)	3 <mark>5%</mark> 43%	71% <mark>1</mark> 3%	ৣ√ NA 49%<mark>37</mark>%	31%43%	26 <mark>%49%</mark>	A SA ★ NA SA EU
Healthcare will be more equitable	30% <mark>39</mark> %	★ 54% <mark>1</mark> (43% <mark>35</mark> %	★ NA	24 <mark>%46%</mark>	A SA ★ NA SA EU 25 <mark>%55%</mark>
Most patients will self-diagnose with AI tools available online rather than see a clinician	42% <mark>38</mark> 9	32% <mark>43</mark> %	49% <mark>38%</mark>	اراً 45% 45%	4 <mark>1%</mark> 37%	ਤ 50% <mark>37</mark> %

Base: 1710

By Region

Clinicians Doctors

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



%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
Clinicians have less choice of which procedures and therapies a patient receives	38% <mark>35</mark> %	20% 56% * SA EU	44% <mark>37%</mark>	39% <mark>31</mark> %	4 <mark>1%<mark>32</mark>%</mark>	3 <mark>6%</mark> 36%
Hospitalization rates are lower	41% <mark>32</mark> %	55% <mark>1</mark> 9%	45% <mark>28</mark> %	41% <mark>32</mark> %	`` 3 <mark>8%<mark>33</mark>%</mark>	[→] NA SA 35%48% EU AP
Most healthcare will be delivered in the patient's home	50% <mark>28</mark> %	★ 59% <mark>1</mark> 6%	55% <mark>27</mark> %	51% <mark>27</mark> %	48% <mark>30</mark> %	NA 46% 36%

Base: 1710



Clinicians

Doctors

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 <mark>% 62%</mark>	51% <mark>25</mark> % *	29 <mark>%58%</mark>	34% <mark>41% ** NA</mark>	9% 78%	NA SA EU 21% 68% EU
Everyone will be able to easily access healthcare (universal healthcare)	26% <mark>59%</mark>	60% <mark>23</mark> % *	33% <mark>57%</mark>	31% 50%	15 <mark>% 72%</mark>	NA EU 26% 58%
Al will analyze all medical images to identify abnormalities	22% <mark>54%</mark>	25 <mark>%53%</mark>	30% <mark>60%</mark>	14% 62%	22 <mark>%49%</mark>	24 <mark>%</mark> 59%
Hospital stays are shorter	28% <mark>51%</mark>	28 <mark>%51%</mark>	12	23 <mark>%50%</mark>	3 <mark>0%</mark> 50%	29 <mark>% 61%</mark>
Hospitalization rates are lower	33% <mark>50%</mark>	58% <mark>24</mark> %	56% <mark>34</mark> %	38% <mark>38%</mark>	23 <mark>% 63%</mark>	NA SA EU 32%47 %
Healthcare costs are higher (in real terms)	38% <mark>47%</mark>	9% 74% * EU	<u> </u>	25 <mark>%56%</mark>	<mark>55%34</mark> %	11% 76%
Most patients will self-diagnose with AI tools available online rather than see a clinician	35% <mark>39</mark> %	26% 58% ± EU	30% 59% ** EU AP	44% <mark>31</mark> %	3 <mark>4%34</mark> %	ជា 32% <mark>4</mark> 9%

Base: 412

By Region

Clinicians

Doctor



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	Nurses 2/2 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% <mark>36</mark> %	29% <mark>38</mark> %	22%58% ** NA AP	22 <mark>%41%</mark>	3 <mark>5%28</mark> %	17% <mark>56% ★</mark> AP
Most healthcare will be delivered in the patient's home	29% <mark>34</mark> %	44% <mark>27</mark> %	Too few responses	30% <mark>39%</mark>	22 <mark>%31</mark> %	32% 45%
Clinicians have less choice of which procedures and therapies a patient receives	49% <mark>30</mark> %	1 ★ EU AP	Too lew responses	49% <mark>26</mark> %	<mark>58%</mark> 22%	★ EU AP 30% 57%

By Region

Clinicians

Doctors

Nurses

Significantly higher/ lower than all nurses

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)



%Disagree/Agree	Clinicians /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	062,0
Al will analyze all medical images to identify abnormalities	23 <mark>% 56%</mark>	25 <mark>%</mark> 54%	ু 21 <mark>%52%</mark>	26 <mark>%</mark> 56%	力 19 <mark>%</mark> 51%	24 % 56%	يا	17
Healthcare costs are higher (in real terms)	30% <mark>53%</mark>	9% 76%	CH IN P UK * 57% 21%	± 25% 61%	CH JP ★ 45%47%	сн Д 20% 65%	CH JP 27% 59%	CH
Hospital stays are shorter	24 <mark>% 51%</mark>	30% <mark>48</mark> %	⊹ 19 <mark>%54%</mark>	ЈР UK	ик ;; 30% 45%	_ე 33% 389	★ 37% <mark>49%</mark>	Ü
Everyone will be able to easily access healthcare (universal healthcare)	30 <mark>% 51%</mark>	69% <mark>1</mark> 5%	★ 15 <mark>% 63%</mark>	US JP UK ★ 23% 66% BR ★	us JP UK ★ 29% 50%	US -1√. 28%45%	us -ਪੂੰ 46% <mark>41%</mark>	us
Healthcare will be more equitable	26 <mark>% 50%</mark>	56% <mark>1</mark> 9%	★ 9% 68%	us JP UK ★ 18% 68%	US UN ★ 21%46%	us ∑√ 27%43%	us ু বু 41% <mark>44%</mark>	US
Clinicians using AI tools deliver higher qualicare than clinicians who do not use them	ty 27 <mark>% 41%</mark>	28% <mark>39</mark> %	్ 26 <mark>%38%</mark>	ট 3 <mark>6%</mark> 41%	uk 5 21%389	\$ 28% 29	★ 33% <mark>46%</mark>	UK
Hospitalization rates are lower	3 <mark>7% 41%</mark>	57% <mark>2</mark> (★ 21 <mark>%57%</mark>	US IN UK ★ 36%43%	us uk	us ur BR 42%29	★ 60% <mark>26</mark> %	*

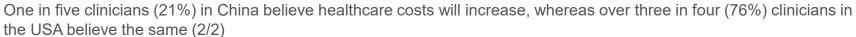
Base: 2120

By Key Country

Clinicians

Doctor







%Disagree/Agree	Clinicia 2/2 n= 2091 - 2		_	China = 465 - 479	-	ndia = 268 - 280	Japan n= 159 - 165	०६३ हा	UK n= 104 - 106		Brazil n= 100 - 106	012,0
Most patients will self-diagnose with A available online rather than see a clin		38% 28% <mark>5</mark> 1%	CH JP UK	44% <mark>22</mark> %	*	31% <mark>52%</mark> JP	36% <mark>35</mark> %	CH	39% <mark>35</mark> %	CH 📈	38% <mark>54%</mark>	CH JP UK
Clinicians have less choice of which procedures and therapies a patient re	ceives 44%	<mark>32</mark> % 21% <mark>57</mark> %	CH IN JP UK B	54% <mark>1</mark> 8%	*	44% <mark>38</mark> % ^{JP}	сн uk 58% 17%	∕ 6 ★	46% <mark>27</mark> %	CH	49% <mark>31</mark> %	CH JP
Most healthcare will be delivered in the patient's home	e 4 <mark>0%</mark>	31% 53% 2	4% 🕇	2 <mark>7%27</mark> %	H	40%36% CH	us U <u>k</u> 50% 22%	*	47% <mark>25</mark> %	Ü	58% <mark>28</mark> %	ŢĴ.

Base: 2120

By Key Country





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)



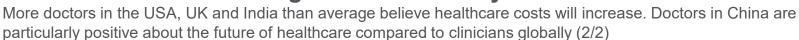
%Disagree/Agree	Doctors 1/2 n= 1687 - 1710	USA n= 152 - 157		China = 406 - 419		dia : 236 - 247		apan = 128 - 133		UK n= 73 - 77		Brazil n= 78 - 84	0620,60
Healthcare costs are higher (in real terms)	21% 59%	9% 75%	CH JP	3 <mark>8%</mark> 29%	*	14% 72%	CH	20% 64%	CH	7% 839	CH JP BR	23% 63%	CH
Al will analyze all medical images to identiabnormalities	fy 24% <mark>59%</mark>	21% <mark>58%</mark>	رار انرا	15 <mark>% 63%</mark>	IN BR أَرْاً	<mark>32%</mark> 53%	ران آمار	26% <mark>57%</mark>	راني ابرا	26% <mark>59%</mark>		30% 52%	ام) انما
Hospital stays are shorter	21% <mark>51%</mark>	27% <mark>46%</mark>	Ż	9% 59%	US JP UK BR 🛊	24 <mark>%</mark> 52%	JP	31% <mark>39</mark> %	*	26% <mark>40</mark> %	*	38% 43%	ជ
Clinicians using Al tools deliver higher qua care than clinicians who do not use them	ality 25% <mark>47%</mark>	25% <mark>41%</mark>	1	15% <mark>58%</mark>	US IN UK BR 🛊	35% <mark>39</mark> %	*	16%54%	US N UK BR	29% <mark>32</mark> %	*	40% <mark>35</mark> %	*
Everyone will be able to easily access healthcare (universal healthcare)	35% <mark>43%</mark>	75% 10%	*	21 <mark>%51%</mark>	US JP BR 🛨	<mark>29%</mark> 52%	US JP BR 🛨	38% <mark>32</mark> %	us *	22% <mark>39</mark> %	US	57% <mark>29</mark> %	us ★
Healthcare will be more equitable	30% <mark>39</mark> %	57% <mark>1</mark> 6%	*	15 <mark>%50%</mark>	US JP UK BR 🚖	29% 49%	US IP UK BR 🛨	33% <mark>30</mark> %	US	31% <mark>28</mark> %	US	48% 31%	us 55
Most patients will self-diagnose with AI too available online rather than see a clinician		3 <mark>3%42%</mark>	CH	46% <mark>27</mark> %	*	3 <mark>2%</mark> 52%	CH UK BR 🛊	41%43%	CH	45% <mark>31</mark> %	£	50% <mark>38</mark> %	ŭ

Base: 1710

By Key Country

Doctors

Significantly higher/ lower than all doctors





%Disagree/Agree	Doctors 2/2 n= 1687 - 1710	USA n= 152 - 157	China n= 406 - 419	India n= 236		Japan n= 128 - 133	06.20,40	UK n= 73 - 77		Brazil n= 78 - 84	062,0
Clinicians have less choice of which procedures and therapies a patient receive	as 38% 35%	20%55%	CH IN JP UK 39% 28%	★ 40	о <mark>ж</mark> 41% ^{JR}	47% <mark>26</mark> %	*	34%32%	Ş.,	49% <mark>34</mark> %	7,7
Hospitalization rates are lower	41% <mark>32</mark> %	55% <mark>1</mark> 9%	★ 26 <mark>%40%</mark>	US IN JP UK BR 48	us 3 <mark>%2</mark> 9% ⊈	48% <mark>23</mark> %	*	45% <mark>1</mark> 8%	*	51% <mark>24</mark> %	5/7
Most healthcare will be delivered in the patient's home	50% <mark>28</mark> %	61% <mark>1</mark> 6%	★ 41% <mark>32</mark> %	US JP UK	us 1 <mark>%30</mark> % ^{JP U} K	68% <mark>1</mark> 7%	*	61% <mark>1</mark> 7%	*	62% <mark>25</mark> %	1,7

Base: 1710

By Key Country





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)



%Disagree/Agree	Nurses 1/2 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
Healthcare will be more equitable	22% 62%	56% <mark>23</mark> %	± 3% 86	us 6% 88°	us 9% 63%	us 23%58%	US ŞÜ
Everyone will be able to easily access nealthcare (universal healthcare)	26% <mark>59%</mark>	63% 20%	± 8% 75°	%	us ★ 19% 68%	US 5/-3	ជ ជ
Al will analyze all medical images to identi abnormalities	fy 22 <mark>% 54%</mark>	28% <mark>19%</mark>	☆ 27 <mark>%40%</mark>	★ 20 <mark>%</mark> 60%	☆ 13% <mark>45%</mark>	[↑] 23%53%	ি Too few responses
lospital stays are shorter	28% <mark>51%</mark>	32% <mark>50%</mark>	√ 29 <mark>%</mark> 50%	ોં√ 3 <mark>5%</mark> 48%	ੂੰ 28 <mark>%50%</mark>	ો 3 <mark>9%35</mark> %	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Hospitalization rates are lower	3 <mark>3% 50%</mark>	58% <mark>22</mark> %	★ 15% 73 °	% US 24% 58%	us รู้นี้ 16% 78 %	us u <mark>⊈ 40%40%</mark>	
Healthcare costs are higher (in real terms)	38% <mark>47%</mark>	10% 77%	P 1 4%	★ 35% 50%	CH 71% 29%	33% <mark>47%</mark>	CH Sign
Most patients will self-diagnose with AI too	35% 30%	24 <mark>%60%</mark> ^J	CH JP U ★ 4 <mark>2%1</mark> 7%	* 29% <mark>53%</mark>	CH J党 31% <mark>28</mark> %	[‡] 32% <mark>39%</mark>	CH T

Base: 412

By Key Country



Significantly higher/ lower than all nurses



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)

%Disagree/Agree	Nurses 2/2 n= 402 - 412	USA n= 79 - 84	China n= 58 - 60		ndia n= 31 - 35		pan 31 - 33		UK n= 29 - 31	Brazil n= 22 - 23	Bá na h
Clinicians using AI tools deliver higher qu care than clinicians who do not use them		30% <mark>37%</mark>	CH 38%	7% 🛨	3 <mark>8%</mark> 44%	CH	25% <mark>22</mark> %	7.5	27%27%	7.7	<u>ال</u> الم
Most healthcare will be delivered in the patient's home	29% <mark>34</mark> %	44% <mark>32</mark> %	्र _ै 14 <mark>%</mark> .	<mark>22</mark> % 🐈	26 <mark>%</mark> 41%	Ç.	33% <mark>27</mark> %	5.5	32%32%	۲ ^{۱۱} .	\$7
Clinicians have less choice of which procedures and therapies a patient receive	ves 49% <mark>30</mark> %	21 <mark>%</mark> 58%	CH IN JP 69%	8% 🛨	48% <mark>35</mark> %	CH JP	69% 9%	*		ជ់	14

Base: 412

By Key Country









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

Base: n= 2206





I believe clinical Al tools will...

	Clinicians N= 2206	Doctors N= 1781		Nurses N= 425	
save me time	70%	71%	00.21, 00	70%	002,0
allow me to make a diagnosis more quickly	58%	58%	<u> </u>	57%	7,7
help improve patient outcomes	55%	54%	t)	56%	47
enable me to more accurately diagnose patients	54%	57%	T.	52%	14
.increase the quality of patient consultations	50%	51%	₩ ₩	48%	☆
mean most of my patients receive ersonalised treatment plans generated by Al	<mark>40%</mark>	38%	17. 14.	41%	7.4 7.4
None of the above	6%	7%	4	5%	7
Don't know	6%	5%		7%	,,, ,i,

Clinicians

Doctors

Overall

Nurses

Significantly higher/ lower than all clinicians

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

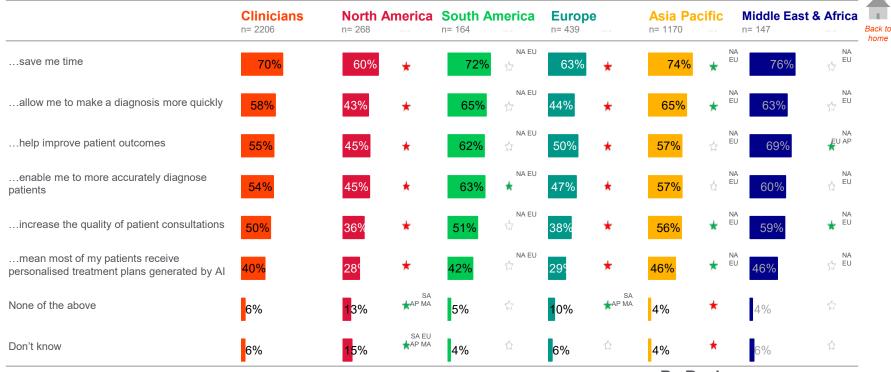
Question: Thinking specifically about clinical Al tools, what impact do you think they will have in the next 2-3 years.

163

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



I believe clinical AI tools will...



Base: n= 2206

By Region

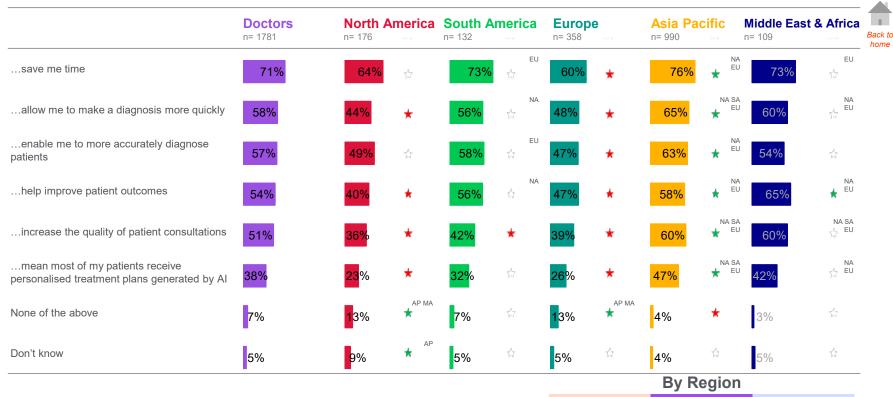
Clinicians

Doctor



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...





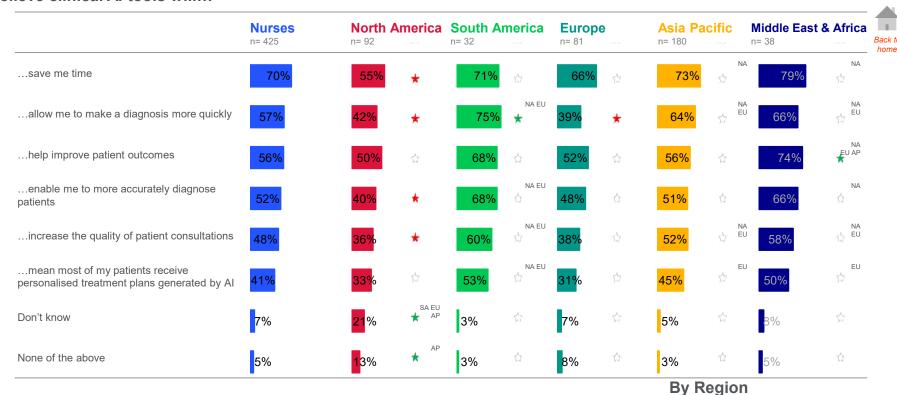
Doctors



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

Base: n= 1781

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



Significantly higher/ lower than all nurses

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

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

Base: n= 425

Nurses

166

ELSEVIER

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



I boliovo clinical Al toole will

	Clinicians n= 2206	USA n= 247		China n= 481		India n= 292			Japan n= 170			UK n= 109		Brazil n= 108	Back to home
save me time	70%	58%	*	77%	ws www.	74%	7.7	US UK	72%	7.7	US	62%	5.7	78%	US Jul UK
allow me to make a diagnosis more quickly	58%	44%	*	75%	US IN JP UK BR	59%	<u>يا</u> ي-ر	US UK	58%	<u> </u>	US	47%	*	64%	US UK
help improve patient outcomes	55%	44%	*	^{JP} 64%	₩ JP	59%	4	US JP	26%	*		62%	U ∏ J	66%	₩ JP
enable me to more accurately diagnose patients	54%	44%	*	64%	US IN	56%	☆	US UK	52%	Å		44%	*	68%	US ★IN JP UK
increase the quality of patient consultations	50%	34%	*	62%	US IN	54%	7.7	US JP	41%	*		46%	Ū,	52%	US Jaj
mean most of my patients receive personalised treatment plans generated by Al	40%	<mark>25</mark> %	*	53%	US # JP UK	49%	★ JP	US	31%	*		33%	17	47%	US JP UK
None of the above	6%	13%	★ CF	JP BR 2%	*	4%	رالح آمار		4%	5/15		15%	★ IN J B	6%	CH
Don't know	6%	14%	C⊦ ★ JP	1 N UK BR	*	4%	÷	СН	6%	ú	CH	3%	☆	2%	t

Clinicians

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

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

Base: n= 2206 167

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%)



believe clinical Al tools will														
	Doctors n= 1781	USA n= 160	0 C.D., CD	China n= 421	01.2 ಬ	India n= 257	062, 3		Japan n= 137	0620,17	UK n= 78	0.027 60	Brazil n= 85	Back to home
save me time	71%	65%	7L 7x7	81%	US IN UK	65%	7.7		75%	IN U	53%	*	78%	orazo u US IN UK
allow me to make a diagnosis more quickly	58%	45%	*	76%	US IN JP UK BR	52%	جال <u>.</u> آبار		58%	U.	45%	*	54%	TAT
enable me to more accurately diagnose patients	57%	49%	*	74%	US IN JP UK BR	53%		UK	53%	U	37%	*	61%	∜ UK
help improve patient outcomes	54%	41%	*	66%	US ★ JP UK	60%	*	US JP	18%	*	50%	JP	59%	₩ US JP
increase the quality of patient consultations	51%	36%	*	71%	US IN JP UK BR	51%	74	US UK	42%	*	35%	*	47%	13
mean most of my patients receive personalised reatment plans generated by Al	38%	<mark>22</mark> %	*	58%	US IN JP UK BR	41%	71.7	US UK	32%	ŽŽ.	22%	*	38%	US UK
None of the above	7%	12%	★ C⊢	3%	*	6%	جار آما	СН	6%	5-3	23%	US CH IN JP BR	7%	₩ CH
Don't know	5%	8%	ħ	^{CH} 2%	*	6%	1.7	СН	5%	T.	3%	ú	5%	ک ^{را} ت آما
									Ву	Key (Country	/		17

Base: n= 1781

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

Doctors

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

Significantly higher/ lower than all doctors

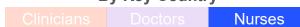
Fewer nurses in Japan than globally believe AI will help improve patient outcomes (33% vs. 56%, though low n)



I believe clinical AI tools will...

Delieve Cillical Al 10015 Will															
	Nurses n= 425	USA n= 87	862, D	China n= 60	oc 2 0		India n= 35	0CD ₁ 3		Japan n= 33	0620,07	UK n= 31	062,60	Brazil n= 23	Back to home
save me time	70%	52%	*	73%	5.7	US	83%	, J.J.	US	70%	-/L }.v/	71%	-/L }')(
allow me to make a diagnosis more quickly	57%	43%	*	73%	*	US UK	66%	J-J	US	58%	Ş.5	48%	چا <u>لے</u> آپ-آ		55
help improve patient outcomes	56%	46%	, i	63%	ŭ	US JP	57%	ú	JP	33%	*	74%	US JF	Too few re	esponses
enable me to more accurately diagnose patients	52%	40%	☆	53%	ń		60%	Å	US	52%	Å	52%	Ď		â
increase the quality of patient consultations	48%	32%	*	53%	5.7	US	57%	7.7	US	39%	T.V	58%	US	;	74
mean most of my patients receive personalised treatment plans generated by Al	41%	29%	*	47%	ij	US	57%	7.7	US JP	30%) v -/L	45%	ĬŢ.). J
Don't know	7%	<mark>21</mark> %	★ CH	JK 0%	*		3%	1		6%)~i	3%)-j		
None of the above	5%	15%	*	2%	ú		3%	ú		3%	ń	6%	ń		T.

By Key Country



Significantly higher/ lower than all nurses

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

 $\label{thm:constraints} \textit{Question: Thinking specifically about clinical Al tools, what impact do you think they will have in the next 2-3 years.}$

Base: n= 425

Demographics

(after weighting)



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

Base: n= 2206



	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425	3.230
Primary care	<mark>24</mark> %	17%	<mark>32</mark> %	DR
Secondary care	54%	59%	, NU 49%	*
Other	<mark>16</mark> %	<mark>19</mark> %	* NU 14%	*
Don't know / prefer not to say	5%	5%	6%	ţ;

	Overall	
Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians



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 A	America	South A	America	Europ n= 439	e	Asia Pa	acific	Middle Ea n= 147	st & Africa	Back t
Primary care	<mark>24</mark> %	32%	AP ★	<mark>30</mark> %	AP	28%	AP	<mark>19</mark> %	*	36%	★ AP	
Secondary care	54%	45%	*	48%	Ĭ.,	57%	NA MA	58%	NA S ★ M		*	
Other	<mark>16</mark> %	<mark>21</mark> %	★ EU	<mark>20</mark> %	FU EU	11%	*	<mark>1</mark> 6%	¦ E	20%	Ę, EU	
Don't know / prefer not to say	5%	2%	*	1%	*	4%	Ú	7%	★NA S E	4%	ជុំ	

Base: n= 2206

By Region

Clinicians

Significantly higher/ lower than all clinicians



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 A		South A n= 132	merica	Europe n= 358	160,0	Asia Pa	acific	Middle Eas	st & Africa	Back to home
Primary care	17%	<mark>20</mark> %	_A_ }.√	14%	ĭ√.	19%	7.47	<mark>1</mark> 5%	14	28%	SA EU AP	
Secondary care	59%	60%	75	70%	AP MA	70%	NA ★AP MA	54%	*	50%	75	
Other	19%	17%	EU EU	16%	EU ST	9%	*	<mark>23</mark> %	★ ^E	21%	F. EU	
Don't know / prefer not to say	5%	2%	☆	0%	*	2%	*	7%	★NA S EU M	A 1%	th	

By Region

Clinicians Doctors Nurses



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 A	America	South <i>n</i> = 32	America	Europ n= 81) e	Asia Pa	cific	Middle Eas	t & Africa	Back to home
Primary care	<mark>32%</mark>	42%	AP	47%	AP	38%	AP	<mark>23</mark> %	*	45%	AP	
Secondary care	49%	30%	*	<mark>25</mark> %	*	44%	\\.	62%	NA S⁄ ★ EU M⁄	^A 29%	*	
Other	14%	<mark>25</mark> %	★ EU AP	<mark>25</mark> %	AP	13%	r.	9%	ţ,	18%	\$\$	
Don't know / prefer not to say	6%	3%	ţ.	3%	ţ)	6%	13	7%	Å	8%	ń	

Base: n= 425

By Region



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



175

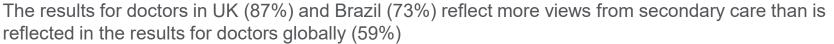
	Clinicians n= 2206	USA n= 247		China n= 481		India n= 292		Japan n= 170		UK n= 109		Brazil n= 108	
Primary care	<mark>24</mark> %	31%	*	CH JP 6%	*	29%	7.7	^{CH} 21%	5.47	^{CH} 24%	T.J. C	[⊣] 27%	CH
Secondary care	54%	45%	*	61%	* L	56%	ţ;	63%		us BR 68%	★ U B	50%	걌
Other	<mark>1</mark> 6%	<mark>22</mark> %	★ JP	, IN 20%	★ JP U	14%	7	10%	*	9%	*	<mark>21</mark> %	JP UK
Don't know / prefer not to say	5%	1%	*	12%	★ US JP U	IN 1%	*	6%	ī, IN	us 0%	*	2%	

By Key Country

Clinicians

Doctor









176

	Doctors n= 1781	USA n= 160		China n= 421		India n= 257		Japan n= 137		UK n= 78		Brazil n= 85	
Primary care	17%	<mark>19</mark> %	1.7 (7%	*	21%	CH UK BR	28%	★ Ur BF	5%	*	<mark>1</mark> 1%	12
Secondary care	59%	62%	\$	53%	*	52%	*	53%	Ĭ,	87	% ★US CH IN JP BR	73%	★IN JP
Other	19%	16%	1.7	<mark>26</mark> %	★ US JP UK	<mark>25</mark> %	★ US JP UK	14%		8%	*	16%	
Don't know / prefer not to say	5%	3%	Å	13%	★ US IN JP UK BR	1%	*	5%	小 IN UK BF	0%	Ü	0%	*

By Key Country

Clinicians Doctors Nurses



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



	Nurses	USA	China	0EZ) EJ	India	0CD ₁ 13	Japan	0ED /1	UK	otz: 60	Brazil
Primary care	n= 425 32%	n= 87	n= 60 ★ CH JP 5%	*	n= 35	CH JF	n= 33	*	n= 31 42%	CI	n= 23
Secondary care	49%	29%	★ 70%	* U	os 60%	ر US	73%	* (JS 48%	JL U	S Too few responses
Other	<mark>1</mark> 4%	29%	★ CHIN 13%	7 ¹ 7	3%		6%		10%		ű,
Don't know / prefer not to say	6%	0%	<mark>★ 1</mark> 2%	元 USI	IN 0%		6%	ζ¦, l	us 0 %		ά

By Key Country

Clinicians Doctors Nurses

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

Base: n= 2206



	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425	0 C.D. C
Nursing Practitioner	<mark>37%</mark>		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)	<mark>1</mark> 2%	2%	<mark>★ 23</mark> %	★ DR

Overa	
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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?

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%)



179

	Clinicians n= 2206	North A	America	South A	America	Europ n= 439) e	Asia P n= 1170	acific	Middle E n= 147	ast & Africa
Nursing Practitioner	37%	<mark>23</mark> %	*	36%	NA	35%	NA Ju	41%	★ E	36%	NA
Midwife	2%	1%	Z ^{II} Z	0%	\rangle - \frac{1}{2}	2%	\ \[\]	2%	<u>-</u> ,	7%	NA SA ★ EU AP
Doctor – Intern/ Junior Doctor/ Resident or equivalent	4%	2%	7,3	2%	Ü	4%	7.3	4%	Ú	2%	JI.]~√
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent	38%	42%	SA	<mark>29</mark> %	*	39%	L SA	39%	I S	39%	" W
Doctor – Fellow or equivalent	4%	2%)\[-\ }\d	2%)./ }./	4%)\d	5%	JL }./	6%	ال NA SA
Physician Assistant/ Physician Associate	3%	1%	J-1	16%	★ NA EU AP MA	2%	7.7	1%	*	2%	يار ا
Other (please specify)	<mark>1</mark> 2%	<mark>28</mark> %	★SA EU AP MA	<mark>1</mark> 4%	J. AP	14%	J. AF	9%	*	8%	ا آسآ

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

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



Nursing Practitioner Nursing Practitione												
Midwife Doctor – Intern/ Junior Doctor/ Resident or equivalent 7% 5% 4% 7% 88% 4% 4% 4% 4% 4% 4% 4% 4% 4% 4% 4% 4% 4% 5% 5% 4% 79% 5% 77% 5% 78% 5% 5% 4% 9% 5% 9% 5% 13% 5% 5% 4% 4% 9% 9% 5% 13% 5% <th></th> <th></th> <th></th> <th></th> <th></th> <th>nerica</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>						nerica						
Doctor – Intern/ Junior Doctor/ Resident or equivalent 7% 5% ¼ 4% ¼ 7% ½ 8% ¼ 4% ¼ Doctor – Qualified Specialist/ Consultant/ Attending or equivalent 77% 86% ★ AP 57% ★ 79% ¾ A 77% ¾ AR 78% ¾ Doctor – Fellow or equivalent 8% 5% ¼ 4% ½ 9% ¼ 9% ¼ 13% ¼ Physician Assistant/ Physician Associate 6% 2% ¾ 32% ★ AP MA 3% ¼ 3% ★ 5% ¼	Nursing Practitioner											
equivalent 7% 5% 4% 7% 7% 8% 4% 17 17% 18%	Midwife											
Attending or equivalent Doctor – Fellow or equivalent 8% 5% 4% 9% 9% 13% NA SA 13% Physician Assistant/ Physician Associate 6% 2% 32% APPMA 3% 3% 4% 3% 4% 3% 4% 3% 4% 3% 4% 4		7%	5%	1/3	4%		7%		8%	ń	4%	7,7
Physician Assistant/ Physician Associate 6% 2% ☆ 32% ★ NA EU AN ☆ 3% ★ 5% ☆		77%	86%	★ AP	57%	*	79%	SA SA	77%	SA SA	78%	SA
20/ 1 20/ 1	Doctor – Fellow or equivalent	8%	5%	J.T.	4%	7.7	9%	7.7	9%	ુ ૂNA SA	<mark>1</mark> 3%	NA SA
Other (please specify) 2% 2% 3% 4 3% 4 1%	Physician Assistant/ Physician Associate	6%	2%	JJ	32%	★ NA EU AP MA	3%		3%	*	5%	\$5
	Other (please specify)	2%	2%	M	3%	الر آساً	2%		3%	M	1%	

Base: n= 1781



Doctors

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?

180



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 Ar	merica	South An	merica	Europe n= 81	66.D, D	Asia Pa	cific	Middle East n= 38	& Africa
Nursing Practitioner	74%	45%	*	74%	NA J.J	69%	N T	82%	★ ^N		NA
Midwife	4%	2%	7.7	0%	رار آ-را	4%	77	4%	5/17	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)	<mark>23</mark> %	53%	★SA EU AP MA	<mark>26</mark> %	الم أسأ	<mark>27</mark> %	A M	<mark>1</mark> 5%	*	<mark>1</mark> 6%	

By Region

Nurses



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



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



182

													nome
	Clinicians n= 2206	USA n= 247		China n= 481		India n= 292		Japan n= 170		UK n= 109		Brazil n= 108	66.20, LD
Nursing Practitioner	37%	<mark>20</mark> %	*	50%	US IN	36%	US	39%	ij	^{US} 39%	US \$\frac{1}{3}	43%	US
Midwife	2%	1%	J-1	^{CH} 0%	*	4%	CH US W UK BR	2%	5/5	^{CH} 0%)-j	0%	ر آمراً
Doctor – Intern/ Junior Doctor/ Resident or equivalen	4%	3%	7.7	6%	★ US IN JP	2%	7.7	1%	*	5%	i IN JP	2%	ĨĴ
Doctor – Qualified Specialist/ Consultant/ Attending of equivalent	or <mark>38%</mark>	44%	12	CH 35% BR	⊸ BR	44%	CH BR	43%	W	40%	₩ BR	<mark>25</mark> %	*
Doctor – Fellow or equivalent	4%	2%	ال أما	6%	★ US IN	1%	*	4%	1.7	^{IN} 4%	_/L_ }∧í	1%	
Physician Assistant/ Physician Associate	3%	1%	참	1%	*	2%		2%	Ţ.	0%	}.J	<mark>21</mark> %	★H US IN JP UK
Other (please specify)	<mark>1</mark> 2%	<mark>30%</mark>	★ C	1% BR	*	12%	r√ CH	9%	t ·	^{CH} 12%	√ CH	8%	r 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?

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





	Doctors n= 1781	USA n= 160	162,0	China n= 421	oca, ci	India n= 257	062 3	Ja n= 1	oan 37		UK n= 78	062/60	Braz i n= 85	0.620,60	
Nursing Practitioner														7	
Midwife														jel.	
Doctor – Intern/ Junior Doctor/ Resident or equivalent	7%	5%	Ŵ	<mark>1</mark> 3%	★ US IN JP BR	3%	*	19	∕ ₀ ★		10%	IN JP	4%	Ü	
Doctor – Qualified Specialist/ Consultant/ Attending or equivalent	77%	88	3% ★	CH 71%	★ BR	87	70 🔭	CH BR	87% *	CH BR	81%	b BR	51%	*	
Doctor – Fellow or equivalent	8%	4%	*	<mark>1</mark> 3%	★ US IN	2%	*	89	6 5.7	IN BR	8%	IN BR	1%	*	
Physician Assistant/ Physician Associate	6%	2%	*	2%	*	4%	77	CH 49	6 \$		0%	*	41%	*	CH US IN JP UK
Other (please specify)	2%	2%	1	2%	T.	3%	ű	JP 0 %	6 5		1%	t	4%	, il	JP

Base: n= 1781



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?

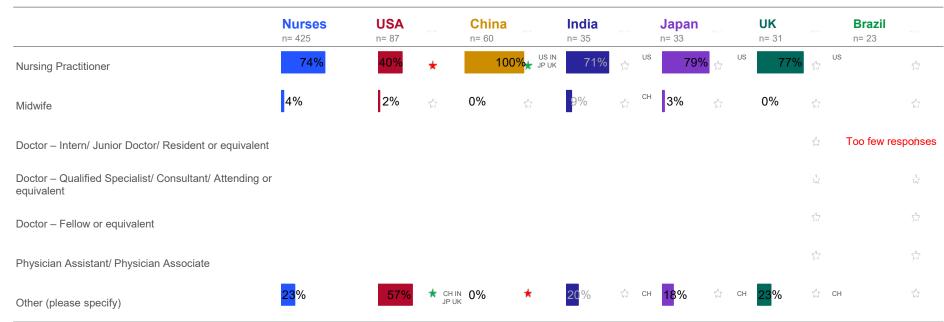
183







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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?







	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425	0 C Z C
Up to 5 years	<mark>22</mark> %	<mark>1</mark> 4%	<mark>30</mark> %	DR
6 to 10 years	<mark>22</mark> %	<mark>1</mark> 7%	<mark>27</mark> %	DR ★
11 to 35 years	45%	56%	№ NU 35%	*
36 years or more	6%	8%	± NU 4%	*
Prefer not to say	5%	5%	5%	5.7

	Overall	
Clinicians	Doctors	Nurses



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 A	merica	South A n= 164	merica	Europ n= 439	e	Asia P one 1170	acific	Middle Eas	st & Africa	Back t
Up to 5 years	<mark>22</mark> %	14%	*	14%	*	17%	*	<mark>27</mark> %	NA SÆ ★EU MÆ	17%	ű	
6 to 10 years	<mark>22</mark> %	19%	SA	9%	*	<mark>22</mark> %	SA	<mark>24</mark> %	SA	<mark>23</mark> %	SA	
11 to 35 years	45%	47%	AP	67%	NA EU	49%	AP	39%	*	52%	AP	
36 years or more	6%	<mark>1</mark> 5%	★SA EU ★AP MA	7%	AP MA	8%	AP MA	3%	*	2%	*	
Prefer not to say	5%	6%	Ħ	3%).j	4%		6%	\$ <u>.</u>	6%	Şj	

By Region

Clinicians





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



187

	Doctors n= 1781	North <i>A</i> n= 176	merica	South A	merica	Europe n= 358	e	Asia Pa	cific	Middle East n= 109	& Africa	Back i
Up to 5 years	14%	12%	ر الر أحا	<mark>19</mark> %	EU	12%		<mark>1</mark> 5%	7.7	13%	Ţ.	
6 to 10 years	17%	15%	ħ	8%	*	18%	SA	<mark>18</mark> %	S	^A 20%	SA	
11 to 35 years	56%	49%	1	61%	NA Jaj	58%	14	56%	W	60%	14	
36 years or more	8%	19%	★SA EU ★AP MA	8%	14	12%	★ AP MA	5%	*	4%	7	
Prefer not to say	5%	5%	جائے EU	3%	ដ	2%	*	7%	★ E	4%	F.	



Clinicians Doctors Nurs

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?



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



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	Nurses	North A	America	South A	merica	Europ	ре	Asia	Paci	fic	Middle Eas	t & Africa
Un to 5 years	n= 425	n= 92	ecz _i o	n= 32	012,0	n= 81	eco; o	n= 180		NA SA EU MA	n= 38	002303
Up to 5 years	30%	16%	*	9%	*	22%	ਨੀ	40%		SA	A	₹7
6 to 10 years	<mark>27</mark> %	<mark>22</mark> %	T) AP	9%	★ NA FU	26%	T) AP	<mark>31%</mark>			26%	T)
11 to 35 years	35%	45%	W	72%	NA EU ★ AP MA	41%	IN AF	<mark>23</mark> %	*		45%	AP
36 years or more	4%	<mark>1</mark> 1%	★ AP MA	6%	7.7	4%	1/2	2%	7.7		0%	7.4
Prefer not to say	5%	6%	1-1	3%	\$1.5 2 ¹ -5	6%	\ }-i	5%	<u> </u>		8%	Ş-J

By Region

Clinicians

Docto

Nurses





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	0 C Z , CD	China n= 481	ocz, ú	India n= 292	8CD, 3	Japan n= 170	002(1)		UK n= 109	862), G		Brazil n= 108	9 C.D., U
Up to 5 years	<mark>22</mark> %	15%	*	<mark>26</mark> %	US BR	40%	CH US JP UK BR	<mark>23</mark> %	14	US	19%	7.7		16%	- II- I
6 to 10 years	<mark>22</mark> %	17%	Å	^{BR} 29%	★ US IN JP BR	21%	BR	21%	1,5	BR	23%	ŵ	BR	8%	*
11 to 35 years	45%	48%	L CH	36%	*	33%	*	46%	547	CH IN	48%	W	CH IN	64%	CH US IN JP UK
36 years or more	6%	<mark>1</mark> 4%	★ C⊦	1%	*	4%	₹ CH	6%	راني آبرا	СН	7%	7.7	СН	8%	₹ CH
Prefer not to say	5%	6%	<u> </u>	™ 8%	★ IN JP	2%	*	4%	ú		3%	<u> </u>		3%	چا <u>ل</u> پاست

By Key Country

Clinicians

Doctor

Nurses









	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	<mark>1</mark> 4%	<mark>1</mark> 3%	الح أحا	^{JP} 17%	ر آم(^{JP} 17%	7 ¹ 7	^{JP} 1%	*	9%	JF JrJ	[°] 19%	JP Jr.i
6 to 10 years	17%	14%	ú	18%	ń	JP 20%	ů	JP BR 8%	*	21%	JF 13 BF	8%	*
11 to 35 years	56%	50%	A.	53%	W	54%	12	749	6 🛨 US CH	56%	a las	62%	N.
36 years or more	8%	18%	★ C	3%	*	5%	7.7	<mark>1</mark> 2%	CH IN	14%	CH IN	8%	ÇL CH
Prefer not to say	5%	6%	듔	^{UK} 10%	★ _{JP}	IN 4% JK BR	75	4%	Å	0%	*	2%	돠

Base: n= 1781

By Key Country

Clinicians Doctors Nurses

190



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	6CD ₁ O	China n= 60	ಂದ್ಯಾಲ	India n= 35	462), 3	Japan n= 33	0620,17	UK n= 31	8CD, G/	Brazil n= 23
Up to 5 years	<mark>30%</mark>	<mark>18</mark> %	*	35%	U کرائے	63%	CH US	45%	US	29%	T.	<u>'</u>
6 to 10 years	<mark>27</mark> %	20%	Ü	40%	* "	s 23%	ħ	33%	يار ا	<mark>26</mark> %	ដ	†; Too few responses
11 to 35 years	35%	46%	★ CH	IN 18%	*	11%	*	18%	str	39%	TAT C	H 14 14 14 14 14 14 14 14 14 14 14 14 14
36 years or more	4%	9%	*	CH 0 %	5.77	3%	7.7	0%	12	0%	7.7	7.7
Prefer not to say	5%	7%	j.,	7%	\$5°	0%	Z	3%	Ġ	6%	Ş ¹ L- }i	\L

Base: n= 425

By Key Country

Clinicians Doctors Nurses



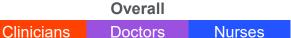
191



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	46.0), C
Direct patient care	79%	84% 🛨	NU 74%	*
Teaching/ education	65%	81% ★	NU 49%	*
Leadership/ administration/ decision making	56%	55%	57%	ដែ
Medical research	53%	80% *	_{NU} 27%	*
Informatics	<mark>1</mark> 5%	16% 54	<mark>1</mark> 4%	الـ }مأ
Other responsibility (please specify)	3%	2% 5-5	4%	★ DR
Prefer not to say	1%	1%	2%	1





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 Back hom
Direct patient care	79%	82% SA MA	70% ★	80% SA MA	81% N	SA 64% ★
Teaching/ education	65%	74% ★ AP	79% ★ ^{EU}	71% ★ AP	58% ★	71% \$\frac{1}{5}
Leadership/ administration/ decision making	56%	54%	59% ∜	57% ∜	56%	54%
Medical research	53%	43 % ★	65% ★ NA EU	55% [♣] NA	52%	NA ★ AP
Informatics	15%	13%	19% 5. T.	18% AP	14% July 1	17% 55
Other responsibility (please specify)	3%	4%	3%	3%	3%	1%
Prefer not to say	1%	2%	0%	1%	1%	0%



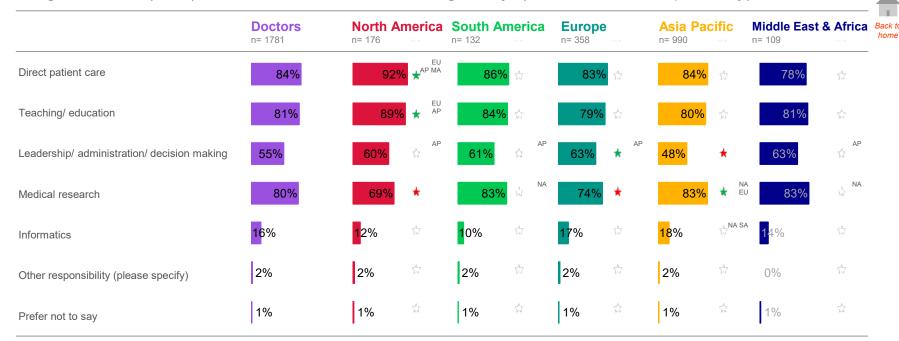






More doctors in North America (as represented in the results) work in direct patient care (92%) and teaching/education (89%) than in the results for doctors globally (84% and 81% respectively)





By Region

Doctors



Question: Which of the following do your current responsibilities as a clinician include, if any?



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 A	merica	South An	merica	Europ n= 81	e	Asia Pao n= 180	cific	Middle East	& Africa
Direct patient care	74%	72%	MA ゴー	54%	*	77%	SA MA	78%	SA MA	50%	*
Teaching/ education	49%	59%	AP	74%	AF ★	62%	AP ★	36%	*	61%	AP
Leadership/ administration/ decision making	57%	47%	7.7	57%	Ü	50%	147	64%	NA √JEU MA	45%	1,7
Medical research	<mark>27</mark> %	19%	N.	47%	★ AF	36%	NA NA AP	<mark>20</mark> %	W	42%	NA ★ AP
Informatics	14%	14%	JL)n/	28%	★ AF	19%	JL AP	9%)./	<mark>21</mark> %	JL AP
Other responsibility (please specify)	4%	5%	Ş-J	3%	7.7	3%		4%	55	3%	7.h
Prefer not to say	2%	2%		0%		1%	N	2%	J.	0%	M

Base: n= 425



Nurses



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%)





196

	Clinicians n= 2206	USA n= 247	China n= 481	0EE, 6	India n= 292	46.0; J	Japan n= 170	0620,17	UK n= 109	Brazil n= 108	0 G 20 (L)
Direct patient care	79%	83% ₍	JP BR 87%	★ JP BR	80%	BR □	73%	75	91% ± IN J	65%	*
Teaching/ education	65%	73%	CHIN 52%	*	59%	*	56%	*	75% 🛨 CI	84%	CH US
Leadership/ administration/ decision making	56%	52%	53%	ជ	57%	Ü	75%	★ US CH IN BR	84% ★ US CI	57%	ជ
Medical research	53%	44%	57%	US JP	50%	14	44%	*	51%	66%	★ US IN JP UK
Informatics	<mark>1</mark> 5%	<mark>1</mark> 2% ನ್ನ	13%	74	17%	JL JP	9%	*	15% %	18%	JL JP
Other responsibility (please specify)	3%	4% st	□ CH 1%	*	4%	JP UK	0%	Z.C	0% ₺	3%	J JP
Prefer not to say	1%	2%	["] ™ 1%	in In	0%	J.	5%	★ CH IN UK BR	1%	1%	N

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?

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%)





							nome
	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 84%	86% ₅	83% ু	91% _] ,	87% ₅
Teaching/ education	81%	89% <mark></mark>	CH 77%	84%	85% _[-]	92% <u></u>	85% _[-]
Leadership/ administration/ decision making	55%	61%	^{CH} 32% ★	63% *	^{CH} 69% ★ ^C	81% ★ US CI	
Medical research	80%	69% ★	92% * US	N K R	77% Jaj	77% ī _d	85% J _A US
Informatics	16%	11% 🔀	19% T	17% T	18% 5a	21% SA U	s 11%
Other responsibility (please specify)	2%	3% ♯	сн 0% ★	3% 55 €	^{CH} 1% ₽	Ş-7	2% ∜
Prefer not to say	1%	1% 🕏	1% 🕏	211 v3	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 197







												nome
	Nurses n= 425	USA n= 87	China n= 60		India n= 35		Japan n= 33		UK n= 31		Brazil n= 23	963LU
Direct patient care	74%	74%	∯ 90%	US IN	74%	7.7	64%	7,7	90	% <u></u> ★	P	75
Teaching/ education	49%	56%	CH IN 27%	*	34%	5-3	27%	*	58%	S. J	H P	747
Leadership/ administration/ decision making	57%	43%	★ 75%	★ US IN	51%	13	82%	6 ★ US	87	% ★ '	S Too few res	sponses
Medical research	<mark>27</mark> %	<mark>18</mark> %	<mark>22</mark> %	14	23%	las	12%	la'	<mark>26</mark> %	14		- L
Informatics	<mark>1</mark> 4%	<mark>1</mark> 3%	☆ JP <mark>7%</mark>	1.7	17%	ال JP	0%	*	10%	71,		يال إما
Other responsibility (please specify)	4%	6 %	☆ 2%	Ş'J	6%	ᆉ	0%	<u>کا</u> لے	0%	Ş-J		جالے پ۔ تا
Prefer not to say	2%	2%	☆ 2%	T.		17	9%	*	0%	T.		T.

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?



Around two thirds (65%) of the clinicians (as represented in the results) work for a hospital, medical school or healthcare provider (1/2)



1/2	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425	0EE, E
Hospital/ Medical School/ Healthcare Provider	65%	66%	63%	7,5
University	<mark>18</mark> %	18%	17%	
Integrated Health Network (IDN)	4%	1%	6 %	★ DR
The Government	4%	3%	4%	<u>↓</u>
Other (please specify)	4%	4%	3%	7.7
College	2%	2%	2%	چالے }-ن
Commercial/ Corporate	2%	3%	★ NU 1%	*

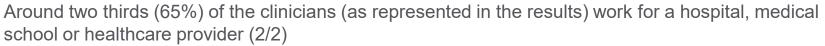




Base: n= 2206

199







200

2/2	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425	062,0
Research Institute	1%	2%	1%	ĵ.j.
Prefer not to say	1%	1%	1%	T.

Overall

Clinicians

Doctors

Nurses



Question: Which of the following best describes your current primary place of work?



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)



Clinicians North America South America Europe Asia Pacific Middle East & Africa Back North America North America North America Nor								
Hospital/ Medical School/ Healthcare Provider 65%	1/2							Back hon
Integrated Health Network (IDN) 4% 3% 4% 4% 5% 5% 1% 7% EUAP College 2% 1% 5% **AP 1% **AP 2% **BU AP 6% **AP 1% **BU AP 6% **AP 6% **AP 1% **BU AP 6% **AP 6% **AP 1% **BU AP 6% **AP 6% 6% **AP 6% 6% **AP 6% 6% **AP 6% 6% 6% **AP 6% 6% 6% 6% 6% 6% 6% 6% 6% 6	Hospital/ Medical School/ Healthcare Provider	65%	54% ★	51% ★				
Integrated Health Network (IDN) 4% 3% 4% 3% 5% 1% 2% 1% 1% 2% 1% 2% 1% 2% 1% 2% 1% 2% 2% 1% 2% 2% 1% 2% 2% 1% 2% 2% 1% 2% 2% 1% 2% 2% 1% 2% 2% 1% 2% 2% 2% 2% 1% 2% <td>University</td> <td>18%</td> <td>23% ★ AP</td> <td>28% ★ EU</td> <td>17% 🕏</td> <td><mark>1</mark>4% ★</td> <td>33% NA ★U AP</td> <td></td>	University	18%	23% ★ AP	28% ★ EU	17% 🕏	<mark>1</mark> 4% ★	33% NA ★U AP	
Other (please specify) 4% 7% **AP 5% **AP 6% **AP 1% ** 6% **AP 1% ** 6% **AP 6% **AP 1% ** 6% **AP 6% **AP 6% **AP 6% **AP 6% **AP 6% **AP 6% ** 2% **AP 6% 6% 6% **AP 6% 6% 6% 6% 6% 6% 6% 6% 6% 6	Integrated Health Network (IDN)	4%	3% 🕏	4%	3% ∜ੌ	5% t M	1% j	
Other (please specify) 2% 1% 5% ★ NA EU AP 0% ★ 2% ★ EU 0% ★ NA EU AP 2% ■ FU D 0% ★ D 0%	The Government	4%	6% EU AP	5% ¹	2% ¹ √	3% J	7% EU AP	
2% 2% ¼ EU 1% ¼ 0% ★ 2% ¼ EU 0%	Other (please specify)	4%	7 % ★ AP	5% AP	6% ★ AP	1% *	5% 5 ¹ / ₃ AP	
2%	College	2%	1%	5% × NA EU	0% *	2% 5 E	J 6% ★ NA EU AP	
	Commercial/ Corporate	2%	2%	1%	0% *	2%	J 0%	

Base: n= 2206



Clinicians

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?

201



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 A		South A	America	Europ n= 439		Asia Pa		Middle Ea	st & Africa	Back to home
Research Institute		1%	0%	7.7	1%	77	2%	NA NA	1%	55	3%	NA Sú	
Prefer not to say		1%	3%	★ EU AP	1%	J-J	1%	Jr.J	1%		0%	الح أحاً	

By Region

Clinicians

Doctors

Nurse





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 Ai n= 176	merica	South A n= 132	merica	Europe n= 358	9CE 0	Asia Pa		Middle East n= 109	& Africa
Hospital/ Medical School/ Healthcare Provider	66%	46%	*	66%	NA پار MA	67%	NA MA	72%	⋆ NA ★ MA	51%	*
University	18%	35%	SA EU	17%	7.7 7.7	19%	AP	<mark>1</mark> 3%	*	32%	SA ★ U AP
Other (please specify)	4%	9%	★ AP	4%	AP	5%	AP	1%	*	6%	AP
The Government	3%	4%	W	4%	1.N	2%	<u>4</u>	3%	W	3%	W
Commercial/ Corporate	3%	3%	The EU	2%	_l_)aí	1%	*	4%	ŢŰ EU	1%),,/
Research Institute	2%	1%	جالے إ	1%	Ş-J	3%	جالے إب	2%	چا <u>ل</u> آپ	3%	چالے پا
College	2%	0%	JI.	1%	N	1%	رار آما	3%	NA EU	1%	J

Base: n= 1781

By Region

Doctors





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)



	2/2	Doctors n= 1781	North A		South A	America	Europ n= 358) e	Asia Pa	acific	Middle Eas	st & Africa Back
Integrated Health Network (IDN)		1%	1%	ţ;	4%	★ AP	2%	참	1%	15	2%	72
Prefer not to say		1%	2%	ال آما	1%	ج ^{ائ} ةً	1%	را آد آ	1%	-11-5)-3	1%	- ^{- -}

Base: n= 1781

By Region

Clinicians

Doctors

Nurses



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		lorth A = 92	merica	South A	America	Europe n= 81	062,0	Asia Pa		Middle East n= 38	& Africa	Back hon
Hospital/ Medical School/ Healthcare F	Provider	63%		61%	SA MA	35%	*	68%	SA MA	69%	SA JJ MA	39%	*	
University		17%	1	2%	ار آجا	40%	NA EU	15%		<mark>1</mark> 4%)~ j	34%	NA ★ U AP	
Integrated Health Network (IDN)		6%		6%	147	3%	T.	5%	T.J	9%	Ñ		7/3	
The Government		4%		8%	A.	6%	W	3%	TAT	3%] _A /	11%	la/	
Other (please specify)		3%		6%	Jul AP	6%	<u> </u>	6%	Jul AP	1%	7.4	3%	_lL_)a/	
College		2%		1%	J-J	9%	★ NA EU AP	0%	\$	2%	7.7	11%	★ NA EU AP	
Prefer not to say		1%	ŀ	4%	★ AP			1%		1%	N		ا اسما	

By Region

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?



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 A	merica	South America n= 32	Europ n= 81	e	Asia P	acific	Middle Eas	st & Africa
Research Institute		1%	0%	75	∯ Too few responses	1%	줐	1%	វ៉េ	3%	ជ
Commercial/ Corporate		1%	2%	- J- J	ر الح آرما		ر ا ج	1%)-J

By Region

Nurses







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)



													home
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 \$\frac{1}{3}	76%	US IN JP BR	45%	*
University	<mark>18</mark> %	<mark>22</mark> %	CHI Fi U	N 8%	*	13%	★ CH	27%	★ IN UK	12%	Ž.	35%	CH US IN UK
Integrated Health Network (IDN)	4%	2%	12	3%	T.	7%	★ CH US BR	5%	17	6%	. BR	1%	7.7
The Government	4%	7%	★ C	н к	*	7%	★ CH JP UK	0%	*	1%	14	4%	JP JP
Other (please specify)	4%	7%	≭ СНІ	0%	*	1%	₹. CH	0%	*	5%	5√ CH IN JP	6%	THE CH
College	2%	1%	T.	1%	\$5	3%	្រី CH US	2%	22		7.7	7%	★H US JP UK
Commercial/ Corporate	2%	3%	√ C	н 0%	*	7%	CH US JP UK BR	2%	₩ сн		⁻ -1	1%	UK IJ

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 207



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%	泛	0%	*	3%	★ CH US JP	0%	7.r.		75	1%	ار آير
Prefer not to say		1%	4%	★ СН	IN 0%	[-]	1%	آم آما	2%	1.7	1%	7.7	1%	آما _.

By Key Country

Clinicians

Doctors

Nurses





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	863, 0
Hospital/ Medical School/ Healthcare Provider	66%	46%	*	91%	US IN JP UK BR	52%	*	58%	Ž,	83 ¹	% ★ IN JP BR	65%	US IN
University	18%	35%	★ CH	1 IN UK BR	*	14%	_ CH	35%	★ IN U	10%	F)	21%	CH
Other (please specify)	4%	8%	★ CH	O%	*	3%	∴ CH	1%	ΰ	4%	CH	4%	J. CH
The Government	3%	4%	14/	CH O%	*	8%	★ CH JP UK	0%	*	1%	W	4%	CH JP
Commercial/ Corporate	3%	3%	7/-	СН 0%	*	12%	★ CH US JP UK BR	4%	L C	Н	7.17	2%	J. CH
Research Institute	2%		7L	0%	*	4%	CH US	1%	15		75	1%	7-7
College	2%		ار آما	1%	√. √	7%	★ CH US JP UK	0%	t.		T.	1%	Į.



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?



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%	يار C	CH	0%)-J		Ţ.		يات پات	1%	ال CH
Prefer not to say		1%	3%	-11-J	1%	1%	¹ 1-3	1%		1%	F.J	1%	~~ T

Base: n= 1781

By Key Country

Clinicians Doctors Nurses

210







1/2	Nurses n= 425	USA n= 87	9620,00	China n= 60	9E3 G	India n= 35	0620,12	Japan n= 33	062(17	UK n= 31	062), 63	Brazil n= 23
Hospital/ Medical School/ Healthcare Provider	63%	64%	55	80%	± Us	63%	끘	67%	T)	68%	7,7	7.7
University	17%	8%	*	<mark>1</mark> 0%		11%		18%		13%	5-3	ţ.
Integrated Health Network (IDN)	6%	3%	Ñ	7%	ά	14%	, US	9%	ជុំ	13%	Ü	Too few responses
The Government	4%	9%	W	3%	W	6%	W		W		W	1 _A
Other (please specify)	3%	7%	الم أما	СН	7.7		7/1/		7	6%	ال CH	7.1
College	2%	1%	75		7.5		7.7	3%	ţ,		Ţ-J	∑ ¹ _ }-i
Prefer not to say	1%	5%	*				W.	3%	t		N	****

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







	2/2	Nurses n= 425	USA n= 87	06.0,0	China n= 60		India n= 35	660, 3	Japan n= 33	UK n= 31	octil er	Brazil n= 23	0CE, U
Research Institute		1%		15	1-7		3%	بال. آبار			75		ال أبدأ
		•			Too few respons	ses	•			Too few resp	onses		
Commercial/ Corporate		1%	2%	7.7	جار [بد]		3%	7.7	ار آمار		T.		7.7

By Key Country

Nurses



The results reflect the views of both male and female clinicians





	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425	66Z, C
Woman	53%	31%	75 %	DR
Man	44%	66%	, NU <mark>22</mark> %	*
Non-binary or gender diverse	0%	0%	0%	
Prefer not to say	3%	3%	2%	JI. 7

	Overall	
Clinicians	Doctors	Nurses

Significantly higher/ lower than all clinicians



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 Ame		America	Europ n= 439) e	Asia Pa	cific	Middle East	& Africa	Back to home
Woman	53%	55%	639	EU ★ AP MA	48%	*	54%	EL کی	49%	1	
Man	44%	37% ★	37%	7,7	51%	SA NA AP	43%	2 <u>7.</u>	46%	75	
Non-binary or gender diverse	0%	ار (۱-)	r	ជា	1%	[1]	0%	7,7	2%	★ NA ★ AP	
Prefer not to say	3%	8%	SA EU AP MA	*	1%	*	3%	SA SA	3%	SA EU	

By Region

Clinicians Doctor

Nurses



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

Base: n= 2206



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	South America n= 132	Europe n= 358	Asia Pacific	Middle East & Africa
Woman	31%	35% Jar	43% ★ AP MA	33% 7h	<mark>28%</mark> 57	29% ¬\\\7
Man	66%	58% ★	57% ★	65% ਨੂੰ	69% J	NA SA 557
Non-binary or gender diverse	0%	ţ;	ជ	0%	0%	2% *
Prefer not to say	3%	7% ★ ^{SA EU}	0%	1%	3%	3%

By Region

Doctors

Significantly higher/ lower than all nurses



In Europe, there is higher representation in the results of male nurses (36%) than in the global nursing results (22%)



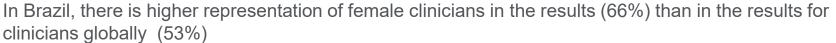
	Nurses n= 425	North Americans 92	South America	Europe n= 81	Asia Pacific n= 180	Middle East & Africa Bad	ack to ome
Woman	75%	74% 5.7	84% デズ	62% *	80% J	EU 5√√	
Man	<mark>22</mark> %	<mark>18</mark> % ∜	<mark>1</mark> 6% 등	36% ★ SA NA	17% 55	26 % 55	
Non-binary or gender diverse	0%	T.	Z's	1%	5/3	3% P	
Prefer not to say	2%	8% ★ ^E A	₽ 0% ₺	0% 🕏	3%	3% ☆	

By Region

Clinicians Doctors Nurses

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

Base: n= 425







	Clinicians n= 2206	USA n= 247		China n= 481		India n= 292		Japan n= 170		UK n= 109		Brazil n= 108	
Woman	53%	55%	7.1	55%	74	53%	7.4	47%	5.7	51%	7.7	66%	CH IN JP UK
Man	44%	37%	*	43%	Ž,	44%	걌	48%	ţ,	US 48%	J. BR	34%	*
Non-binary or gender diverse	0%		J. J.		S.J.	1%	7.7		T.		J- J		J. J.
Prefer not to say	3%	8%	★ CH	1N UK BR	ú	2%	ń	5%	*	CH 1%	ú		Ñ

By Key Country

Clinicians

Doctors

Nurses



Base: n= 2206 217



In China (26%) and Japan (12%), there is lower representation of female doctors than in the results for doctors globally (31%)



	Doctors n= 1781	USA n= 160	China n= 421	0625 ₁ G	India n= 257	860(3	Japan n= 137	UK n= 78	0EZ 0	Brazil n= 85	8C3, U
Woman	31%	36%	TO SH 26%	★ Ji	32%	J	[™] 12% 🗼	28%	JP	45%	CH IN JP UK
Man	66%	56%	★ 71%	★ US	00.0	ti-	84% 🛨	US CH IN UK BR	6 5	55%	*
Non-binary or gender diverse	0%		57	5/3	1%	ÇÎ, C	بر بر				\[\]
Prefer not to say	3%	8%	★ CHIN 3%	ů	2%	ij	4% ☆	3%	Ü		Ü

By Key Country

Clinicians Doctors Nurses

Significantly higher/ lower than all doctors

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

Base: n= 1781

218

Significantly higher/ lower than all nurses



In the global nursing results, three quarters (75%) of the responses are from female nurses



219

													ome —
	Nurses n= 425	USA n= 87	8CD, D	China n= 60	0E2 EJ	India n= 35	662,3	Japan n= 33	062] (7	UK n= 31	002) 60	Brazil n= 23	0
Woman	75%	74%	5.7	83%	5.7	74%	6 5	82	% 5√	74%	6 57	ي امرا	7
Man	<mark>22</mark> %	17%)-J -J	15%).ú	23%	يار بال	<mark>1</mark> 2%	يار يار	<mark>26</mark> %).i	Too few respons	ēs
Non-binary or gender diverse	0%	0%	4	0%	\$	0%	Ü	0%	5-J	0%	Ġ.	t's	ī
Prefer not to say	2%	9%	*	2%	ģ	3%	ģ	6%	ij	0%	ij	ji J.i	J

By Key Country

Nurses

Significantly higher/ lower than all clinicians

The results reflect the views of a spread of age groups





	Clinicians N= 1938	Doctors N= 1560	Nurses N= 378	062 E
21-35 years old	31%	<mark>19</mark> %	42 %	DR
36-45 years old	<mark>27</mark> %	<mark>30</mark> %	NU <mark>24</mark> %	*
46-55 years old	<mark>22</mark> %	<mark>25</mark> %	★ NU 18%	*
56+ years old	<mark>21</mark> %	<mark>27</mark> %	_{★ NU} 16%	*

Overall

Clinicians **Doctors** Nurses



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 Ar	nerica	South Ar	merica	Europe n= 413)	Asia Pa	cific	Middle East &	& Africa	Back to home
21-35 years old	31%	11%	*	_	*	22%	SA NA ★	43%	NA SA ★EU MA		*	
36-45 years old	<mark>27</mark> %	20%	*	<mark>28</mark> %	7.5	<mark>23</mark> %	74	<mark>29</mark> %	NA T EU	29%	NA j	
46-55 years old	<mark>22</mark> %	<mark>24</mark> %	AP	<mark>27</mark> %	Ş ⁱ , AP	<mark>25</mark> %	AP	<mark>17</mark> %	*	35%	NA t u AP	
56+ years old	21%	45%	★SA EU AP MA	31%	★ AP MA	29%	★ ^{AP MA}	<mark>1</mark> 1%	*	18%	AP	

By Region

Clinicians





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 A	merica	South A	America	Europ n= 334	168,0	Asia Pa	acific	Middle East	& Africa	Back to home
21-35 years old	19%	10%	*	<mark>20</mark> %	NA EU	13%	*	<mark>23</mark> %	₩ EL	16%	7.	
36-45 years old	<mark>30%</mark>	21%	*	<mark>24</mark> %	75	27%	7,7	<mark>35%</mark>	NA SÆ ★EU MÆ	22%	7.7	
46-55 years old	<mark>25</mark> %	<mark>22</mark> %	(1)	<mark>30</mark> %	J-3	23%	77	<mark>24</mark> %	7.7	40%	NA t u AP	
56+ years old	<mark>27</mark> %	46%	★ SA EU AP MA	<mark>26</mark> %	AP	37%	★ SA ★AP MA	<mark>18</mark> %	*	<mark>23</mark> %	Ü	

Base: n= 1560

By Region

Doctors





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 <i>I</i>	America	South A	America	Europ	e	Asia Pa	cific	Middle East	& Africa	Back to home
21-35 years old	42%	12%	*	7%	*	32%	SA NA	62%	NA SA ★EU MA	19%	*	
36-45 years old	<mark>24</mark> %	<mark>19</mark> %	7.7	33%	Ţ,	19%	يار ا	<mark>23</mark> %	75	36%	Ž, EU	
46-55 years old	18%	<mark>25</mark> %	AP	<mark>24</mark> %	5.7	<mark>27</mark> %	AP	<mark>1</mark> 1%	*	31%	AP	
56+ years old	16%	44%	★ _{AP MA}	36%	★ AP MA	22%	Å AP	4%	*	<mark>1</mark> 4%	AP	

By Region

Nurses





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%)



	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	<mark>31%</mark>	<mark>1</mark> 1%	*	48%	₩ JP UK BR	54%	US JP UK BR	35%	5.7	US BR	<mark>25</mark> %	US BR	14%	*
36-45 years old	<mark>27</mark> %	<mark>21</mark> %)L_ }-1	35%	★ US IN JP	21%	يار پُريْ	<mark>23</mark> %	يار ا		<mark>25</mark> %	يال يا	31%	يال پُديْ
46-55 years old	<mark>22</mark> %	<mark>26</mark> %	₹ CHI	¹ 2%	*	14%	*	27 %	77	CH IN	<mark>22</mark> %	ŗ∱ CH	<mark>23</mark> %	CH IN
56+ years old	<mark>21</mark> %	42%	★ CHI JPU	1N 4%	*	11%	★ СН	15%	ţ	СН	27%	CH IN JP	32%	★ CH IN JP

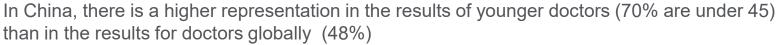
By Key Country



Doctors

Nurses









	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%	<mark>1</mark> 2%	*	<mark>29</mark> %	US # JP UK	24%	US JP UK	7%	*	10%	74	<mark>24</mark> %	US JP UK
36-45 years old	30%	<mark>20</mark> %	*	42%	★ US IN JP UK BR	31%	US	<mark>26</mark> %	7.5	<mark>24</mark> %	75	<mark>22</mark> %	75
46-55 years old	<mark>25</mark> %	<mark>23</mark> %	J-J	<mark>20</mark> %	[-]	23%	<u> </u>	35%	★ US CH IN UK	21%	<u>, </u>	29%	F-3
56+ years old	<mark>27</mark> %	45%	★ CH	9% BR	*	<mark>23</mark> %	∱ CH	32%	穴 CH	45%	★ CH IN BR	<mark>24</mark> %	∱ CH

Base: n= 1560

By Key Country







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	8C2, O	China n= 54	oco, ci	India n= 34	963, 3	Japan n= 31	062) 17	UK n= 3))		Brazil n= 23
21-35 years old	42%	10%	*	65%	* 0	82°	% ± t	1S 61%	*	us 40%	7.7	US	7,47
36-45 years old	<mark>24</mark> %	<mark>22</mark> %	ដែ	<mark>30%</mark>	ţ,	12%	갂	19%	ŢŢ.	27%	5 55		Too few responses
46-55 years old	18%	29%	★ CH IN	6%	*	6%	1.7	19%	J. J	^{CH} 23%) 5.7	CH IN	~ J
56+ years old	16%	39%	★ CH IN JP UK	0%	*	0%	*	0%	*	10%) Å	СН	

By Key Country



