Clinician of the Future

2025 Databook

July 2025

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Summary

Current State of healthcare

- Over two thirds of clinicians are seeing more patients than before.
- Over a quarter think they do not have enough time to deliver good care, due to high patient volumes, excess administration and increasing complexity of patient's medical needs.
- Six in ten say they struggle to keep up with medical advances.
- And nearly half believe tiredness has impaired their ability to treat patients effectively.
- Just under a third are thinking of leaving their role. This is down from 37% in 2023.
- Clinicians believe institutions and national governments performance in key priority areas including providing preventative care and ensuring workforce capacity is low.
- Performance for providing governance and support for use of AI is particularly low scoring.
- Only just over a third think governments are doing a good job of funding clinical research

AI Helping Transform Healthcare

- Over half of clinicians think that AI tools developed to support clinical decision-making will save them time and empower them. They believe it gives them more choice, particularly among nurses.
- Nearly half of clinicians use an AI product for a work purpose. This is nearly double what it was in 2024.
- Of the 48% of clinicians who use AI for a work purpose, nearly all have used a generalist AI tool at some point. Fewer, about three quarters of them, have used a clinical-specific AI tool. Meaning approximately a quarter of clinicians using an AI tool have relied on a generalist AI tool.
- The most common tasks for using (any) AI tool is identifying drug interactions and writing patient letters. Clinical-specific AI tools are most often used for analyzing medical images.
- Around two thirds of clinicians say that automatically citing references, ensuring confidentiality and training the AI on high-quality peer reviewed content would increase their trust in clinical-specific AI tools.

The future of healthcare

- Within the next 2 to 3 years, over half of clinicians believe :
  - Universal healthcare will be available
  - Hospital stays will be shorter
  - But health costs will be higher in real terms
  - And AI will be used to analyze all medical images to identify abnormalities
- Clinical AI tools they think will:
  - save them time
  - speed up diagnosis
  - enable more accurate diagnosis
  - improve patient outcomes

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How to read this databook

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

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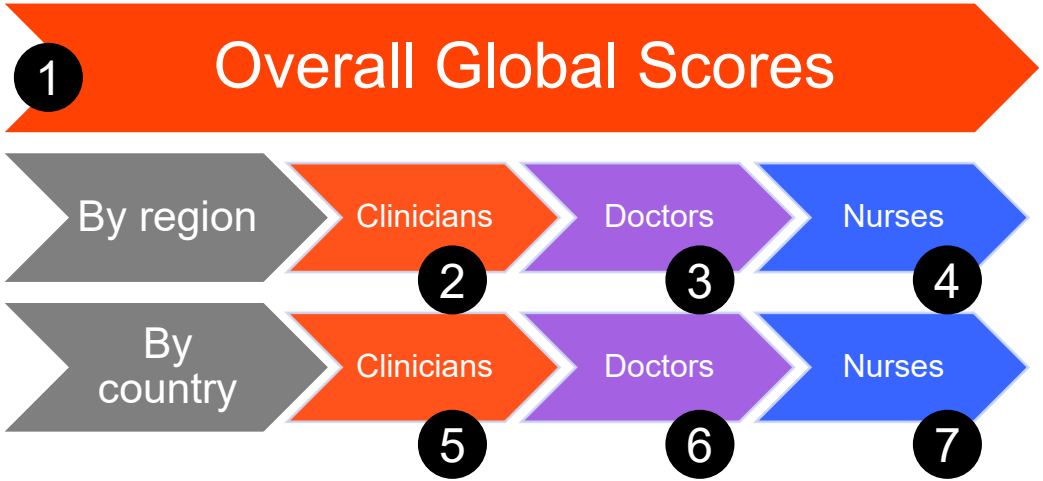

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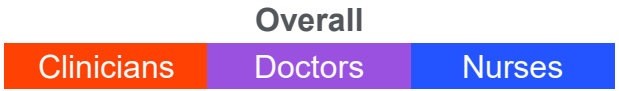
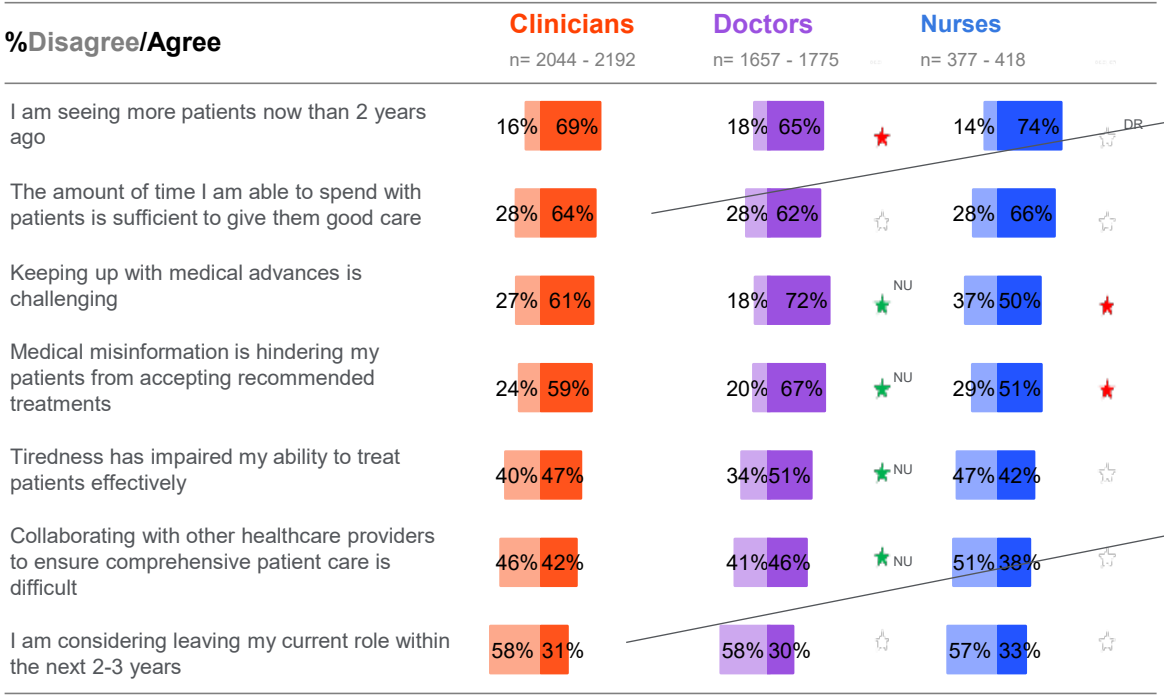


Current State of Healthcare

What is impacting clinicians today

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



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

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

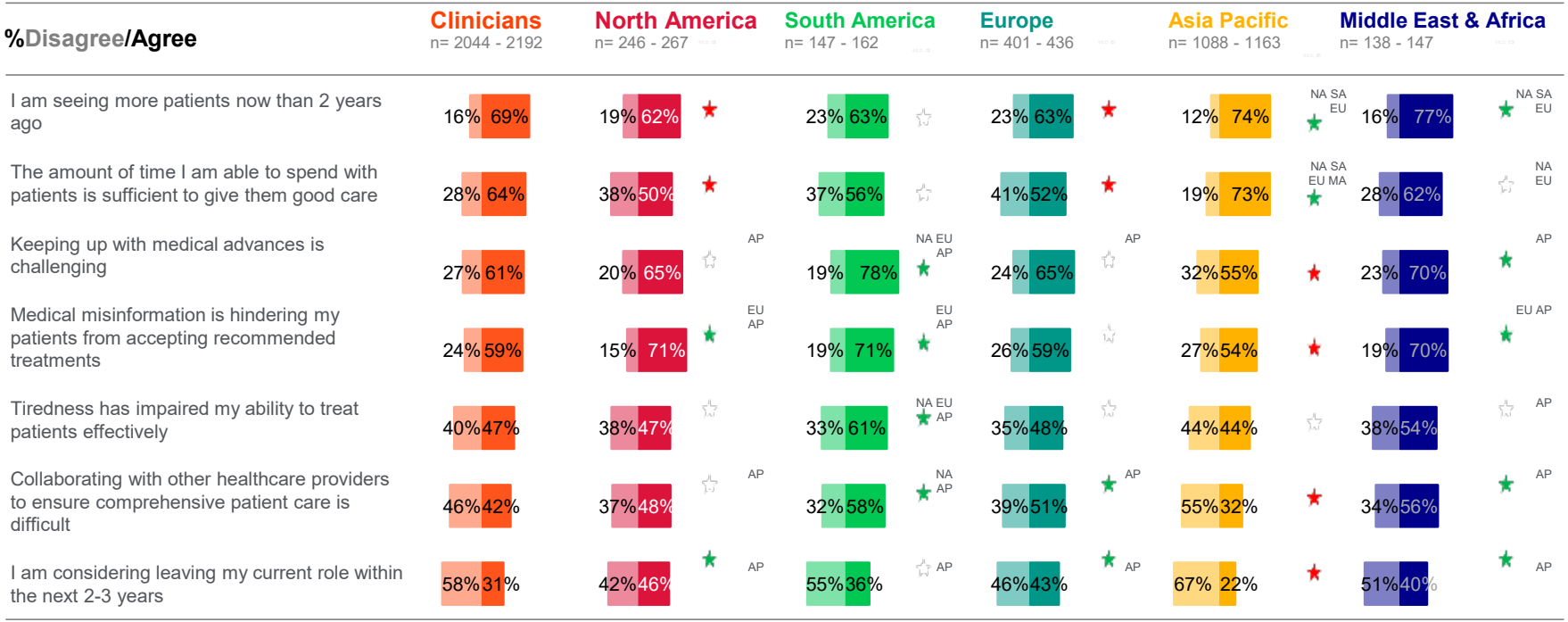
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

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

Base: n= 2044 - 2192

What is impacting clinicians today

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

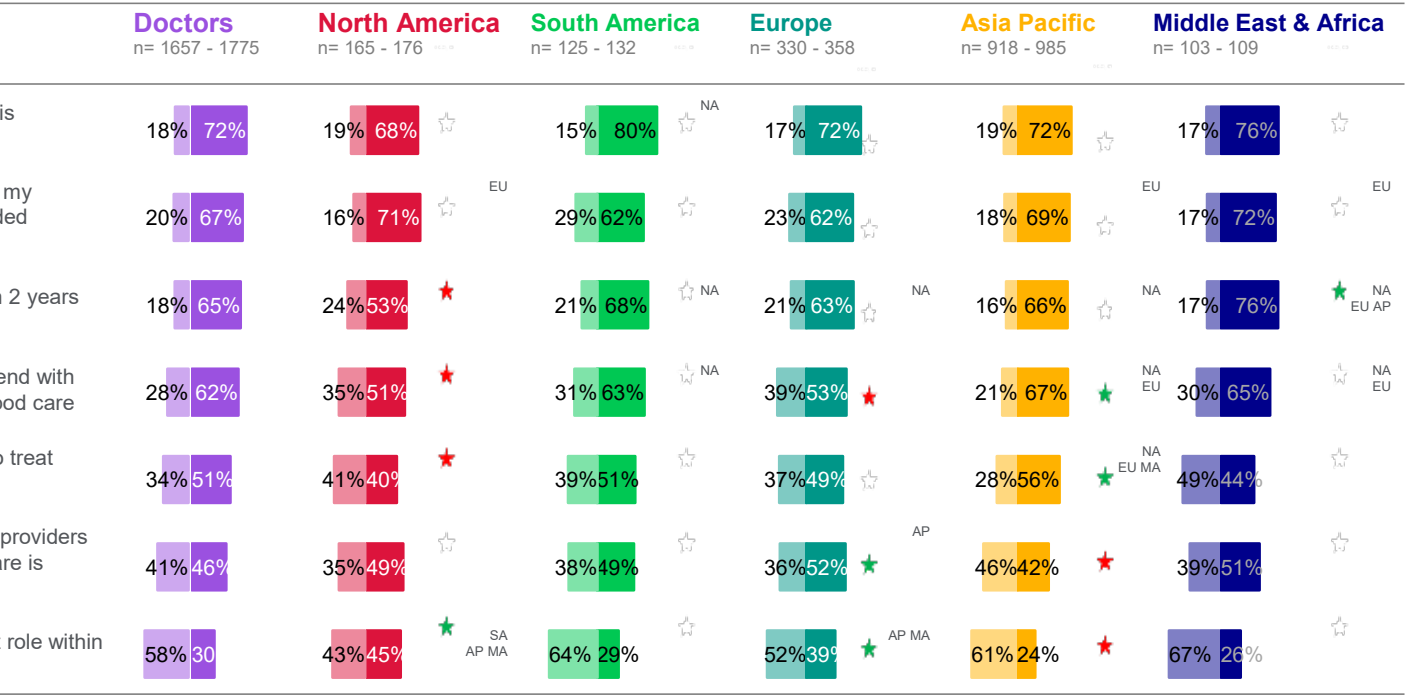
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 2044 - 2192

What is impacting clinicians today

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



By Region

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1657 - 1775

What is impacting clinicians today

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

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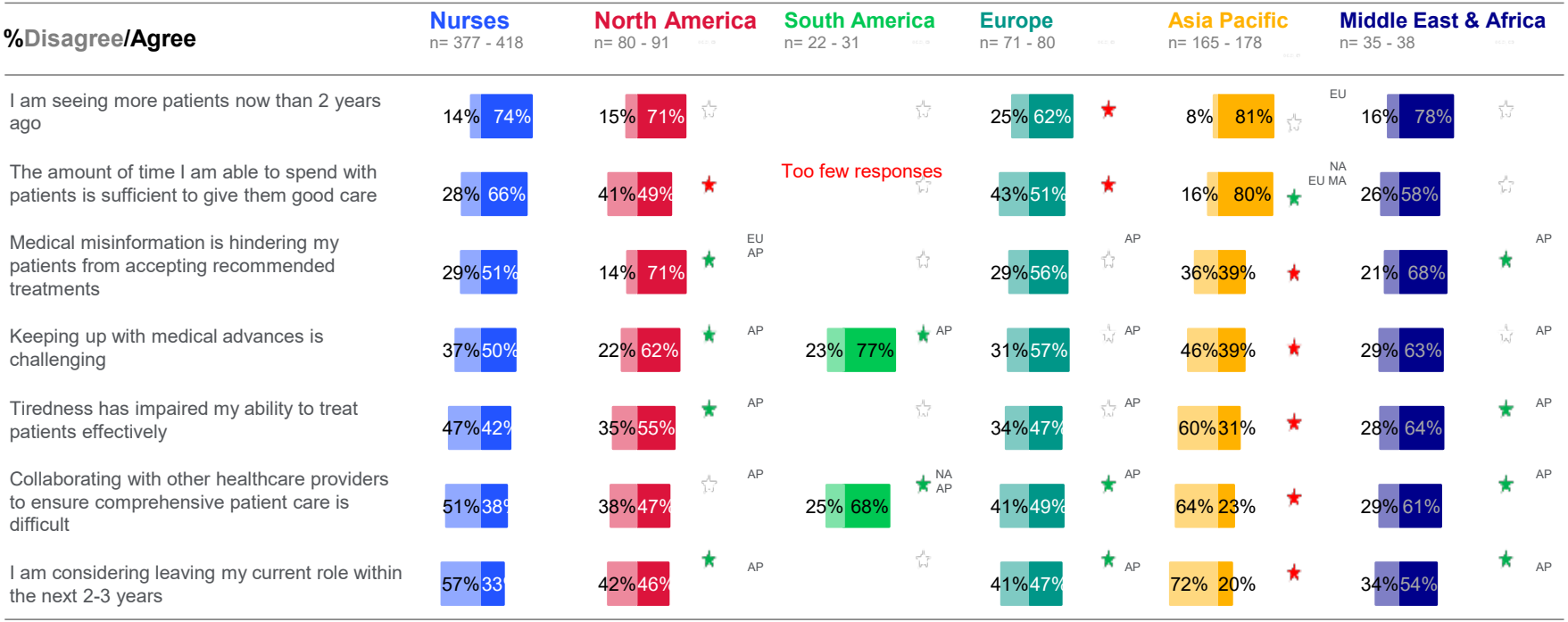


By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

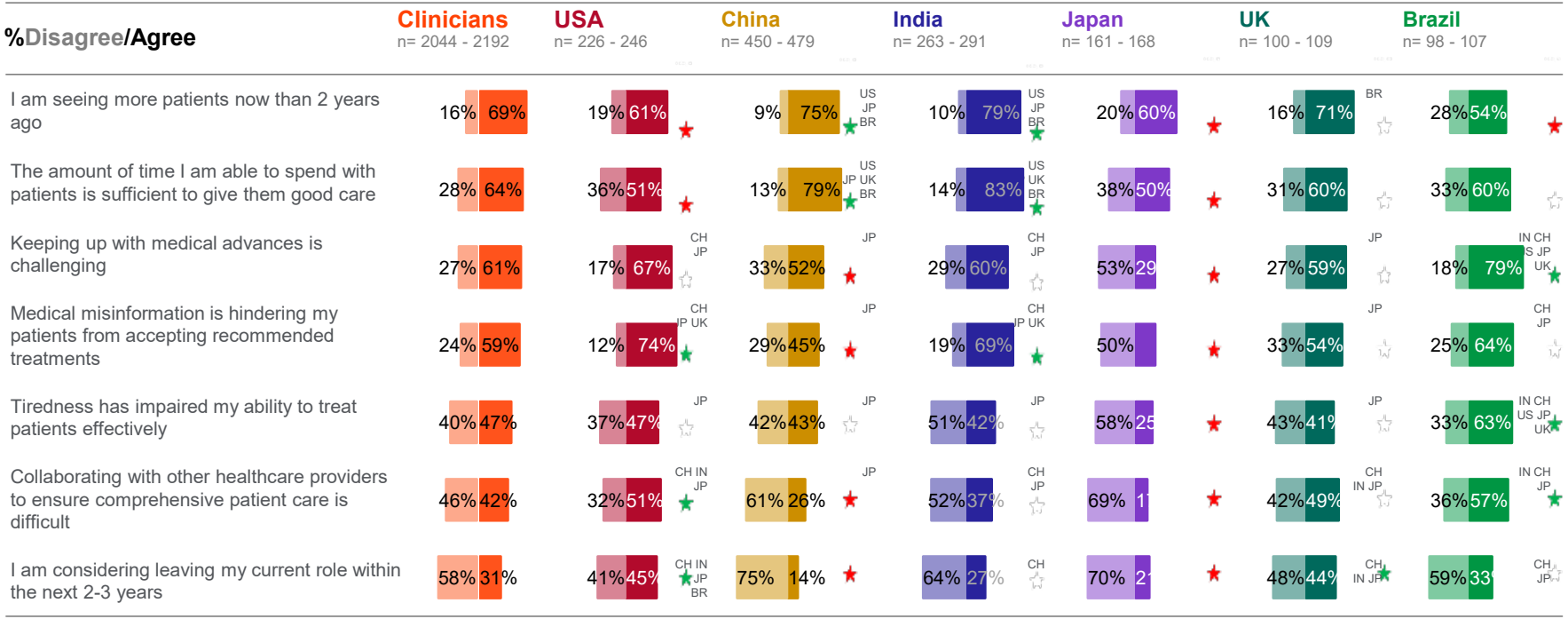
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 377 - 418

What is impacting clinicians today

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

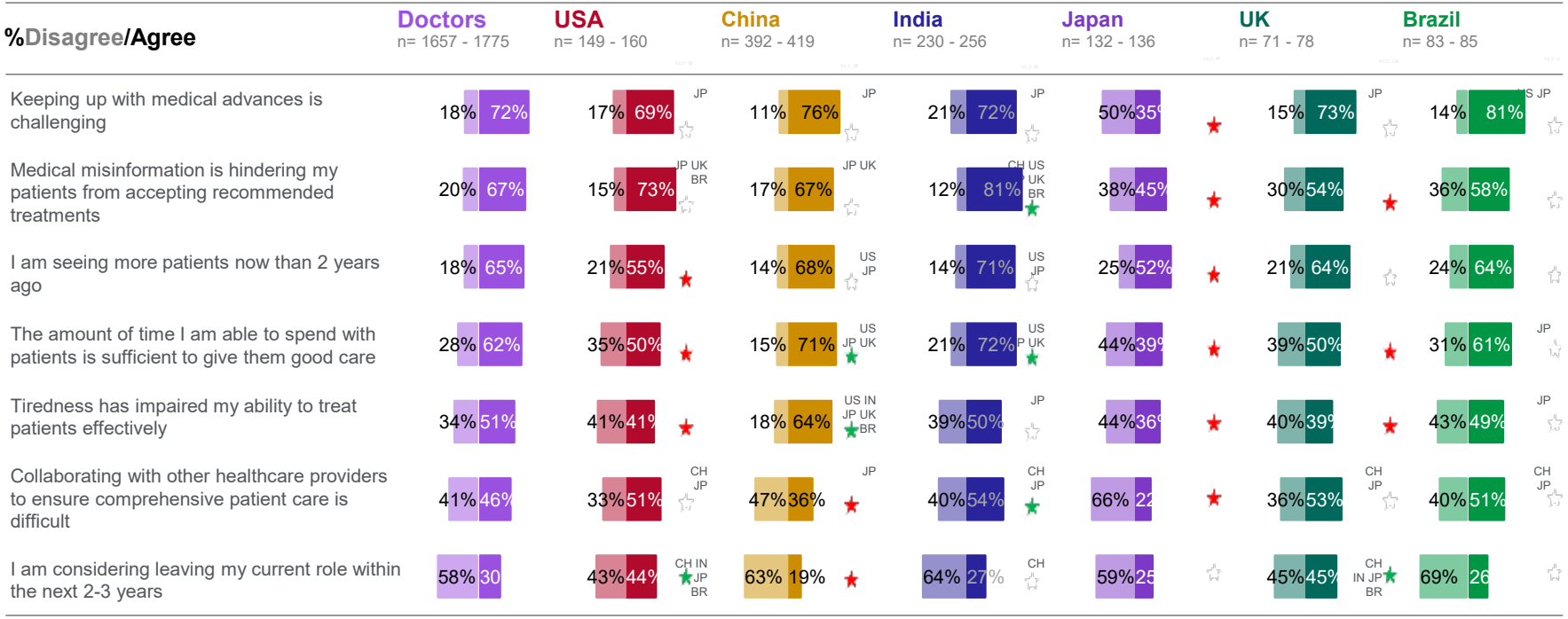
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Base: n= 2044 - 2192

What is impacting clinicians today

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



By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

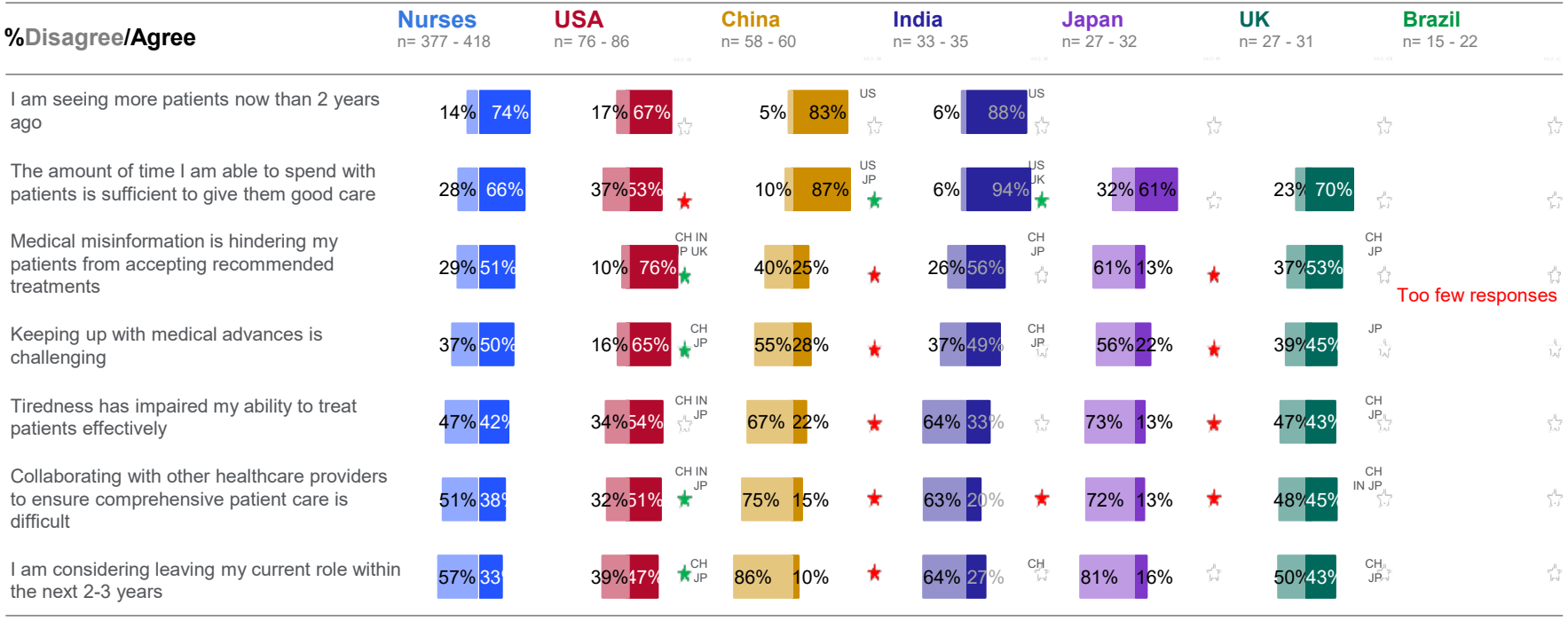
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Base: n= 1657 - 1775

What is impacting clinicians today

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



By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

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

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

Base: n= 377 - 418

Why clinicians are considering leaving their role

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

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

Overall

Clinicians | Doctors | Nurses

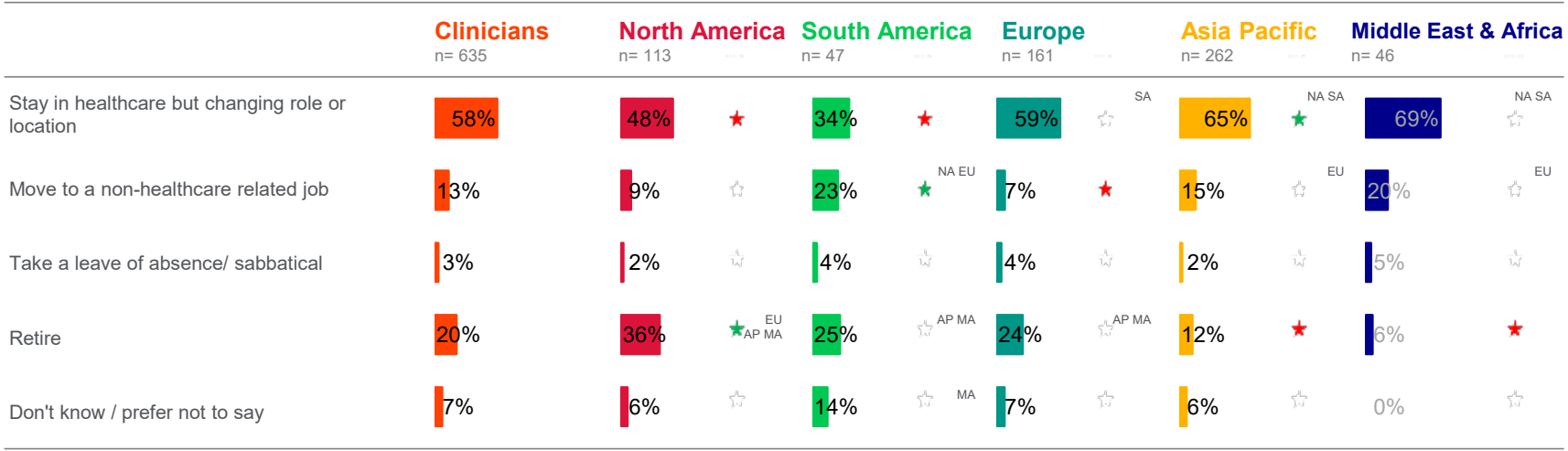
Significantly higher/ lower than all clinicians

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

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

Why clinicians are considering leaving their role

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



By Region

Clinicians | Doctors | Nurses

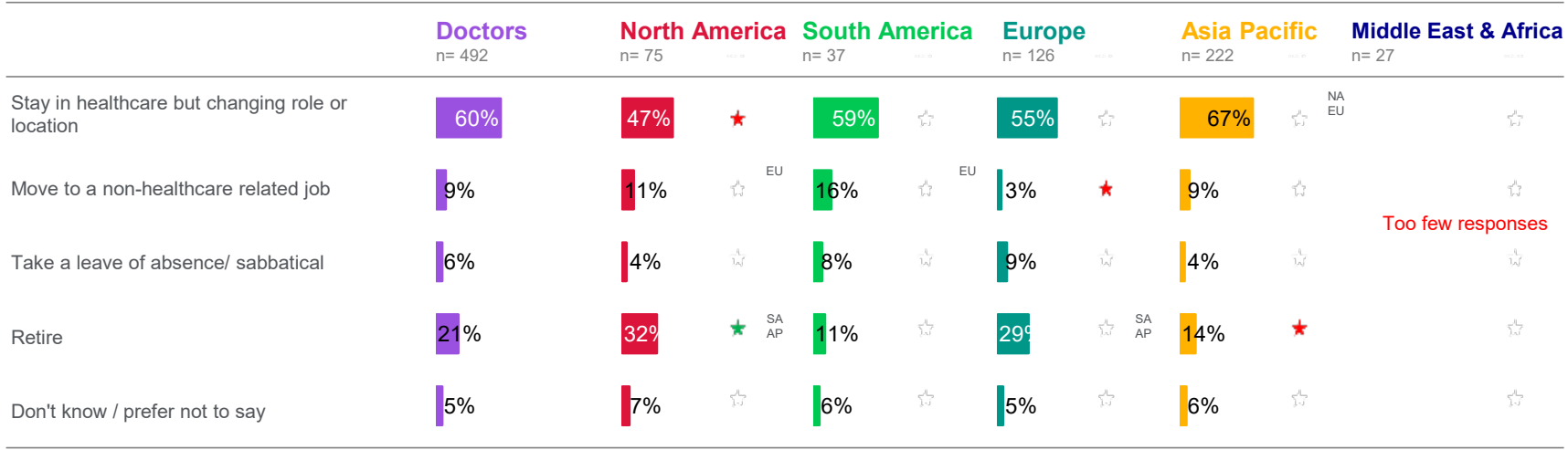
Significantly higher/ lower than all clinicians

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

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

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)



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By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

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%)

Back to home

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

By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

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

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

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%

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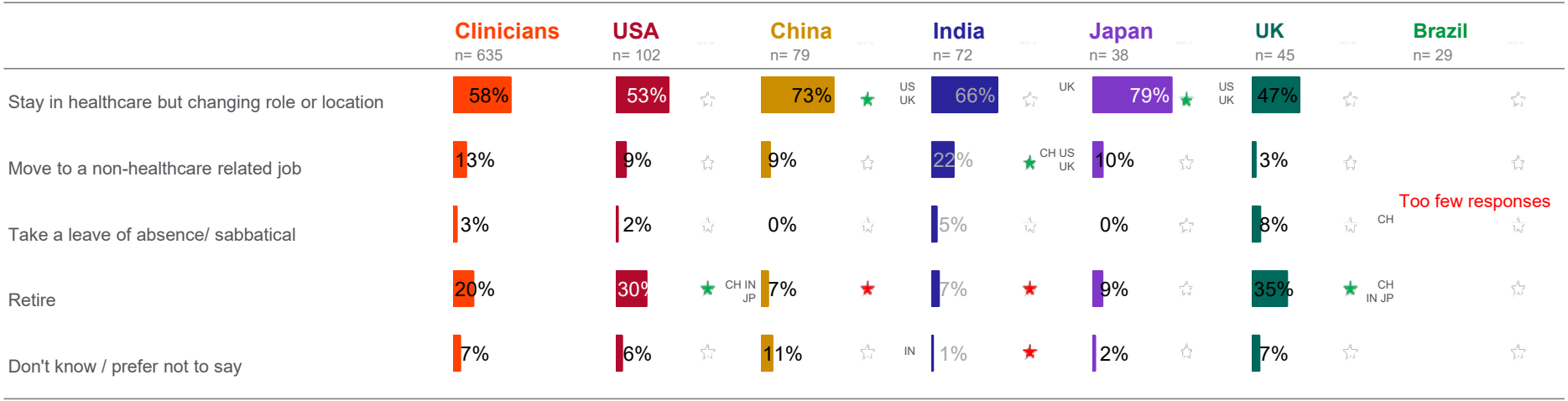

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Why doctors are considering leaving their role

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

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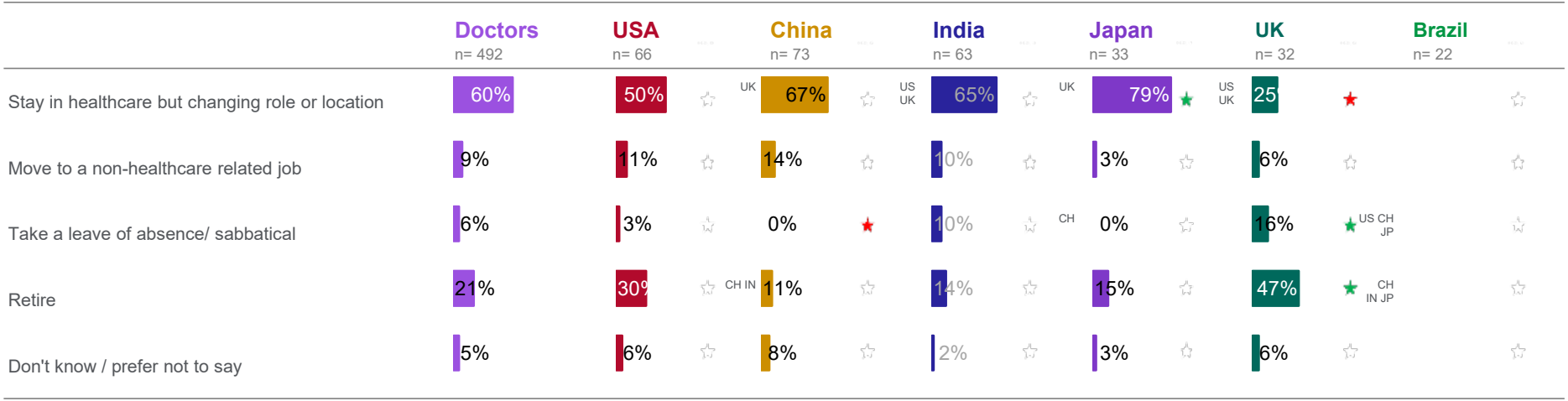


By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Why nurses are considering leaving their role

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

Back to home

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

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

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

Back to home

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

NU

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 607

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

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

Back to home

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

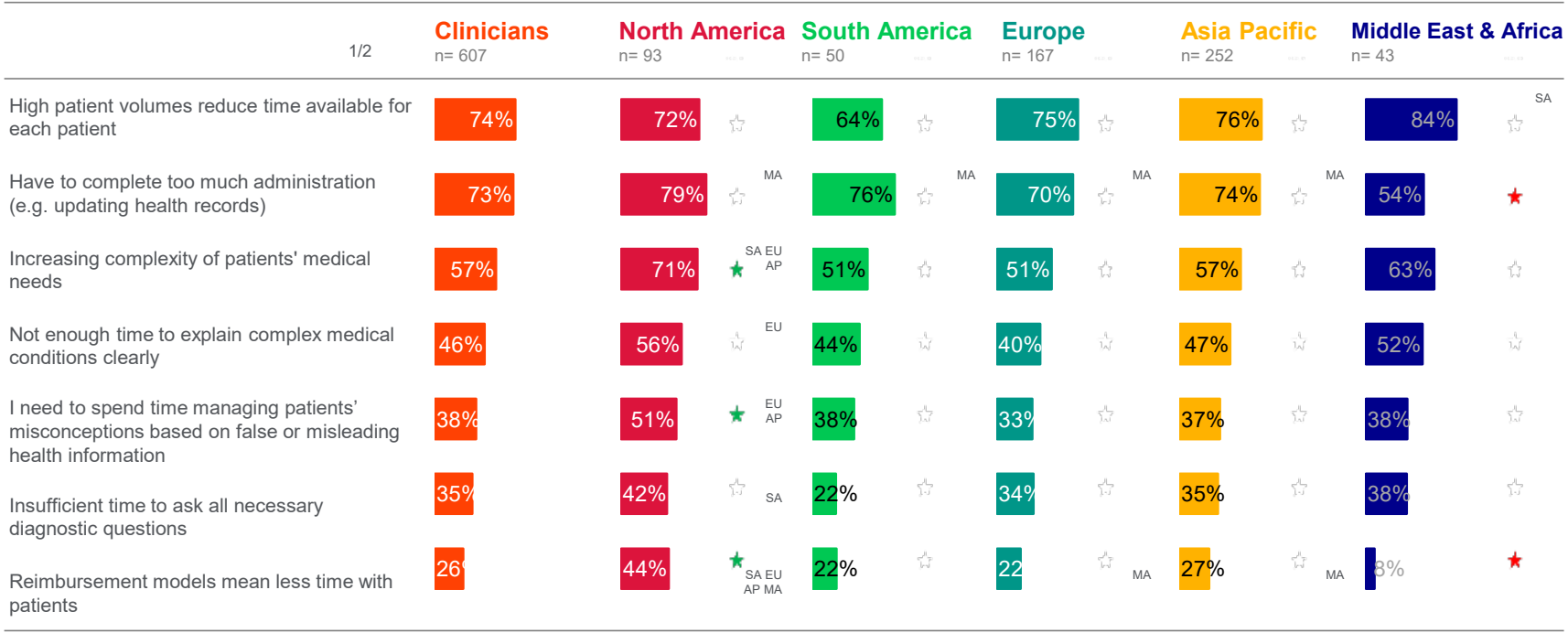
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

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

Base: n= 607

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

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 607

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

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

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

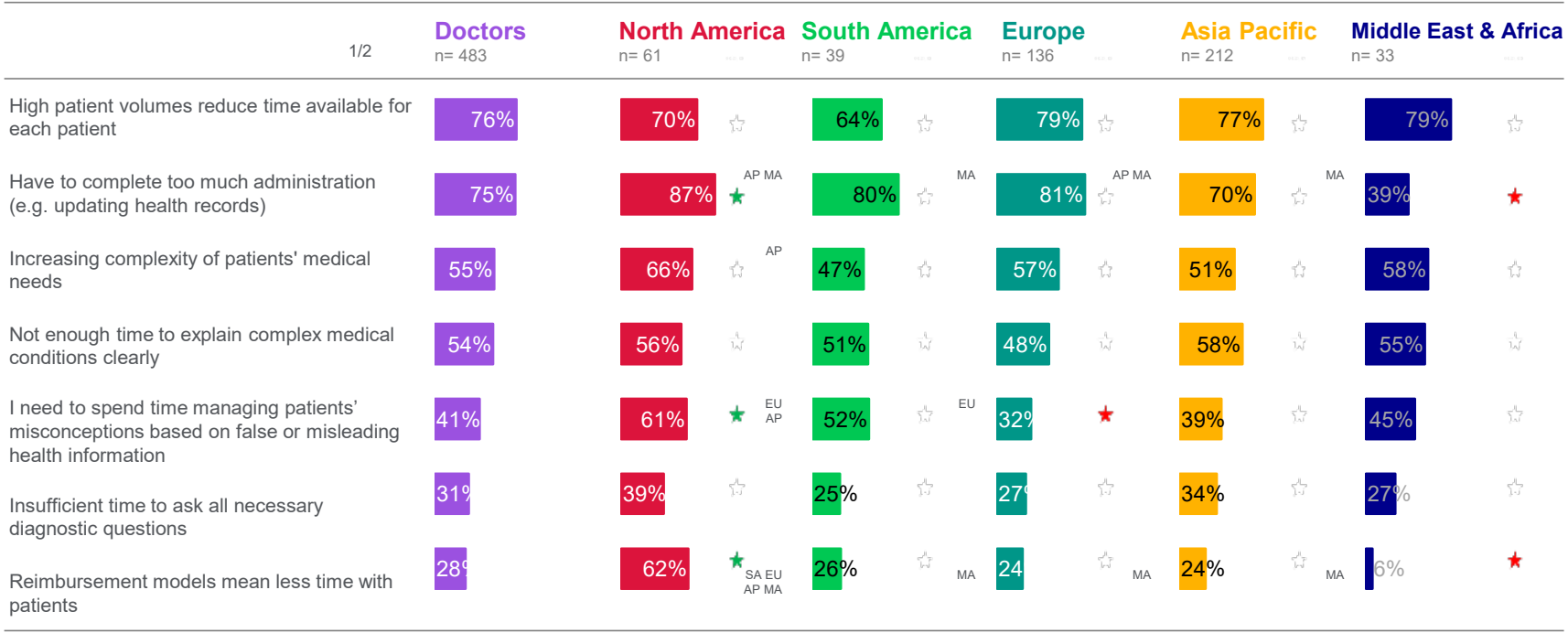
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 607

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

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 483

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

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

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

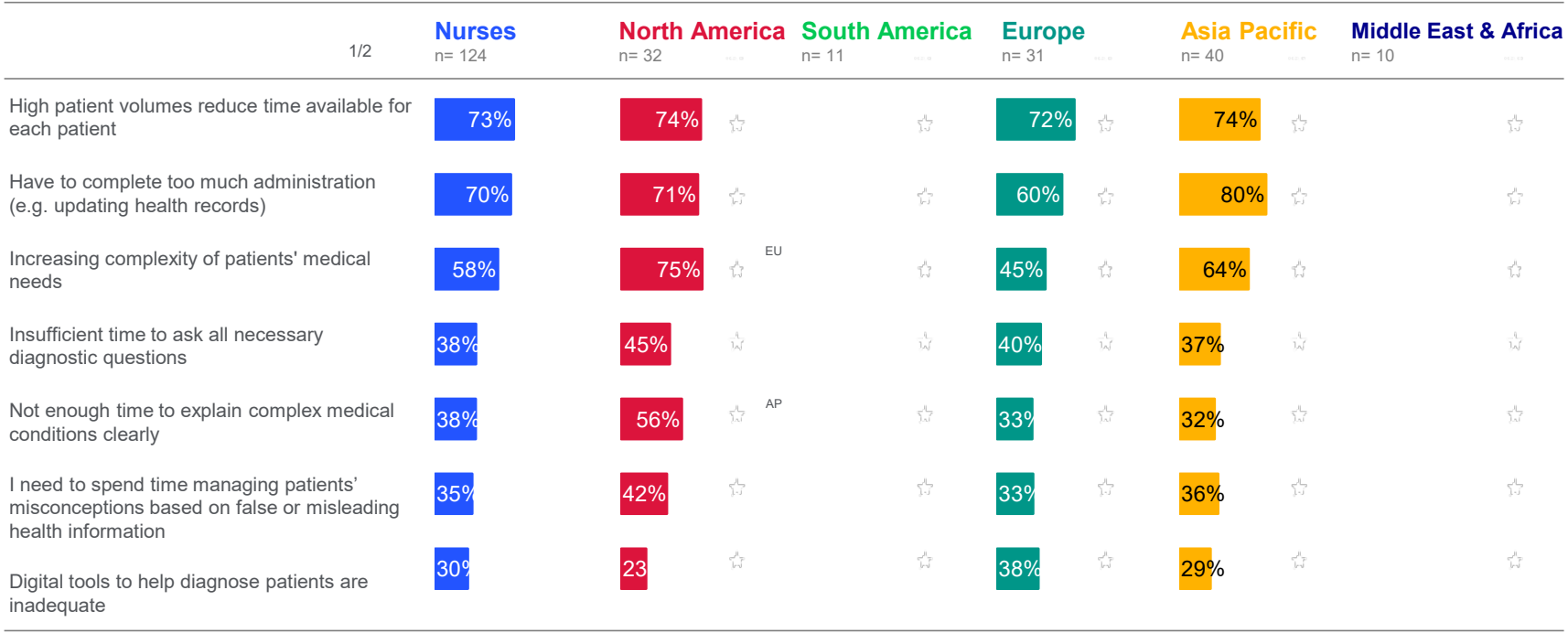
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 483

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

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



By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

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

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

Base: n= 124

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

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

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 124

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

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

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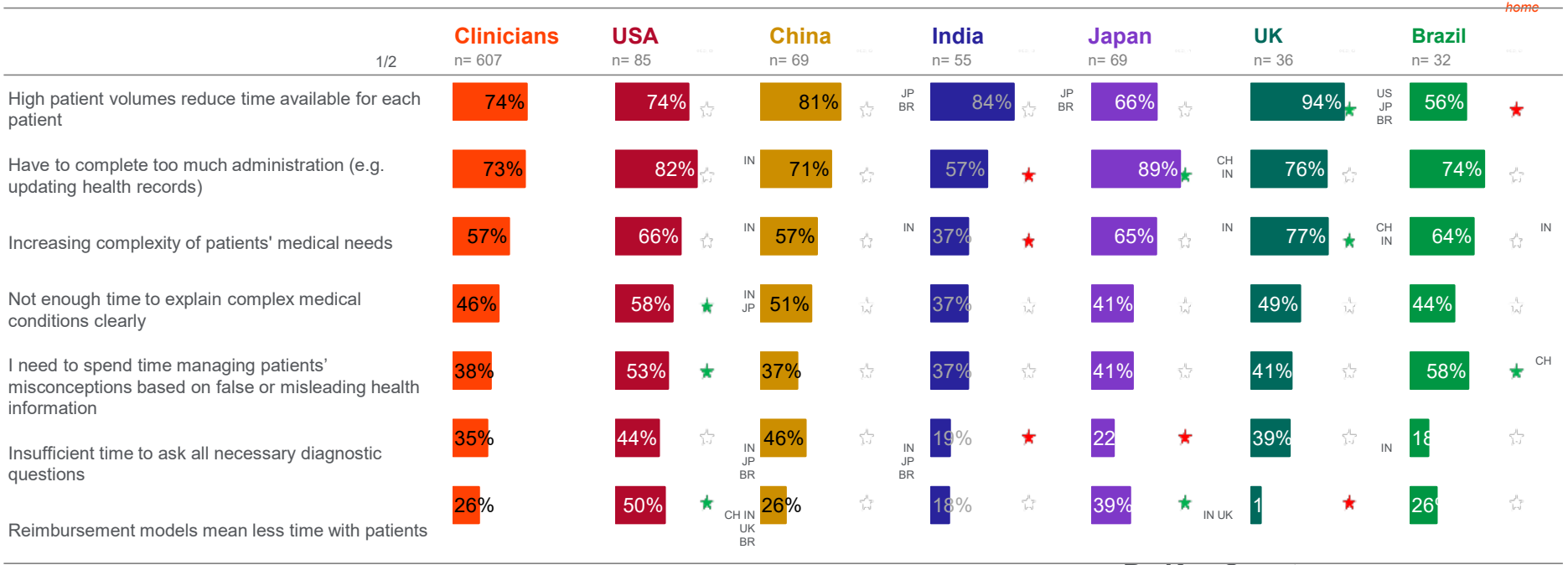

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 607

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

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

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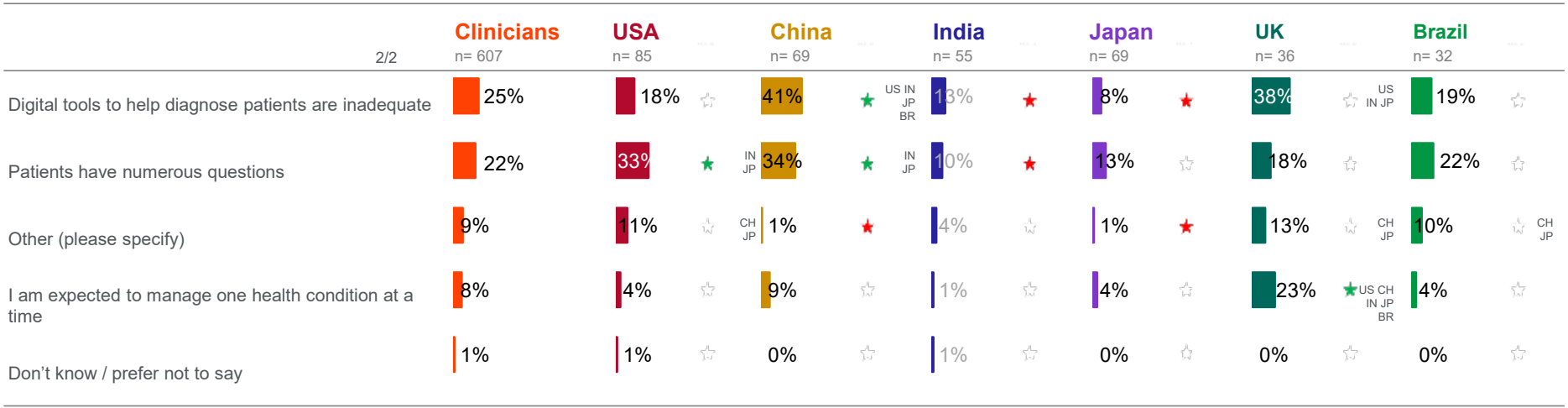

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 607

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

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

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Back to home

1/2

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

Too few responses

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: n= 483

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

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

ELSEVIER

Back to home

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: n= 483

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

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

ELSEVIER

Back to home

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

Too few responses

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

Base: n= 124

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

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

ELSEVIER

Back to home

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

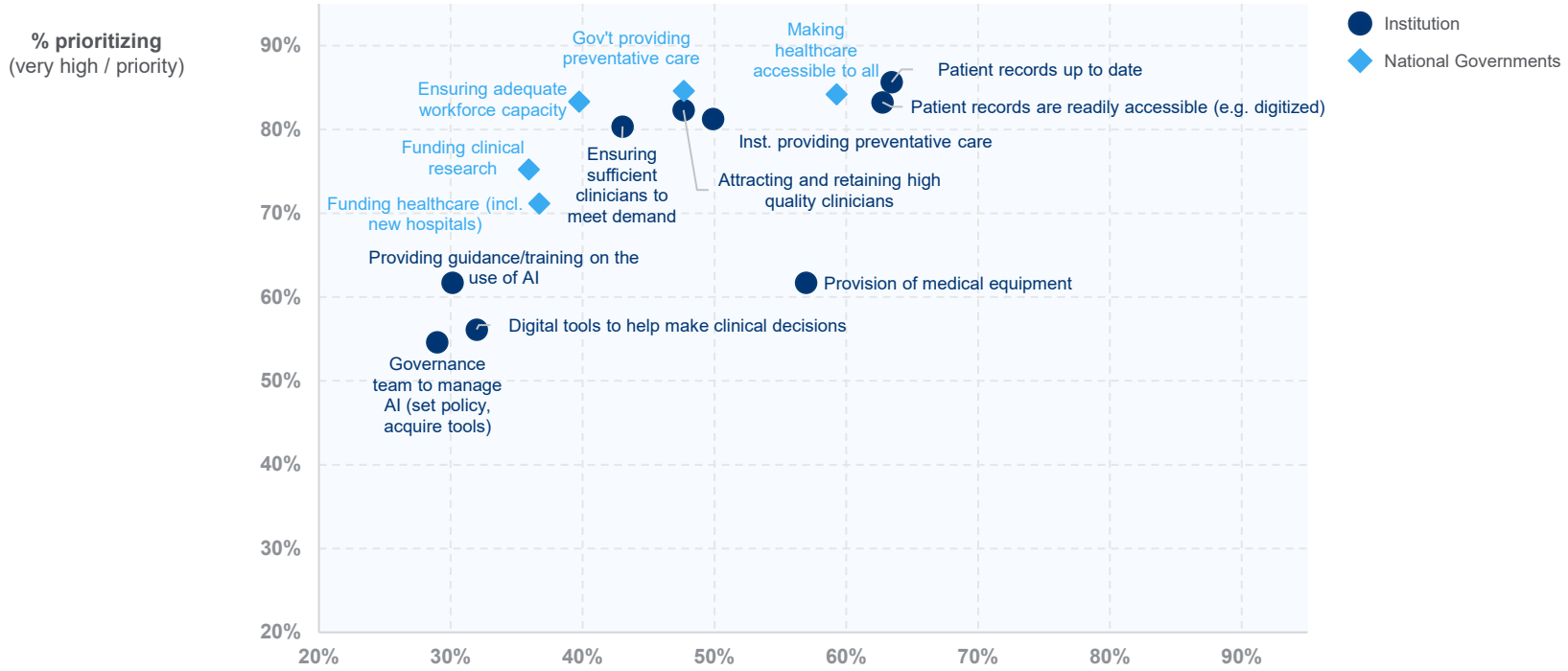
Question: Why do you feel you don't have enough time to provide quality care to patients?
Only asked to those who disagreed "the amount of time I am able to spend with patients is sufficient to give them good care".

Base: n= 124

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

Back to home



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

Overall

Clinicians

Base: n= 2091 - 2186

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)

Back to home

Priority should be assigned by my institution

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

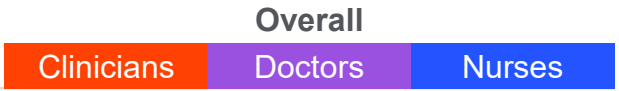
Clinicians' priorities for their institutions

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)

Back to home

Priority should be assigned by my institution

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



Significantly higher/ lower than all clinicians

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

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

Clinicians' priorities for their institutions

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

Priority should be assigned by my institution

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

1/2

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

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)

Back to home

Priority should be assigned by my institution

2/2

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Doctors' priorities for their institutions

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

ELSEVIER

Back to home

Priority should be assigned by my institution

%Low Priority/High Priority 1/2	Doctors n= 1728 - 1759	North America n= 167 - 173	South America n= 130 - 132	Europe n= 346 - 352	Asia Pacific n= 962 - 982	Middle East & Africa n= 104 - 108
Ensuring patient records are up to date	5% 81%	2% 82%	8% 87% AP	5% 84% AP	5% 78%	6% 86%
Ensuring patient records are readily accessible (e.g. digitized)	6% 81%	5% 75%	10% 83%	4% 84% NA AP	6% 79%	8% 85% NA
Attracting and retaining high quality clinicians	7% 80%	2% 88% AP MA	10% 82%	7% 84% AP	8% 76%	8% 77%
Ensuring sufficient clinicians to meet patient demand	8% 77%	3% 87% SA AP	12% 74%	7% 80% AP	8% 75%	8% 81%
Providing preventative care	8% 75%	6% 80% AP	9% 82% AP	7% 76%	9% 71%	6% 88% EU AP
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	17% 61%	18% 61%	21% 59%	20% 57%	15% 62%	21% 58%
Providing the most appropriate medical equipment to support clinicians and patients	17% 61%	18% 61%	21% 59%	20% 57%	15% 62%	21% 58%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

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)

ELSEVIER

Back to home

Priority should be assigned by my institution

%Low Priority/High Priority 2/2	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% 56%	22% 58%	21% 51% ★	14% 61%	19% 55% EU
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	18% 55%	14% 58%	24% 49%	19% 53%	17% 56%	18% 57%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Nurses' priorities for their institutions

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

ELSEVIER

Back to home

Priority should be assigned by my institution

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

1/2

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Nurses' priorities for their institutions

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

Back to home

Priority should be assigned by my institution

2/2

%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
Providing access to digital tools (including AI) that help me make clinical decisions	15% 55%	15% 64% AP	6% 78% EU AP	22% 54%	15% 49%	14% 57%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	21% 54%	15% 62%	10% 70% AP	18% 53%	25% 50%	26% 58%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

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)

ELSEVIER

Back to home

Priority should be assigned by my institution

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

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)

Back to home

Priority should be assigned by my institution

%Low Priority/High Priority	Clinicians 2/2 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
Providing access to digital tools (including AI) that help me make clinical decisions	16% 56%	19% 58% ☆	13% 53% ☆	20% 50% ★	6% 67% CH IN UK ★	15% 53% ☆	12% 69% IN CH US UK ★
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	19% 55%	15% 58% IN ☆	18% 54% IN ☆	30% 45% ★	16% 60% IN ☆	15% 52% ☆	14% 65% IN CH ★

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

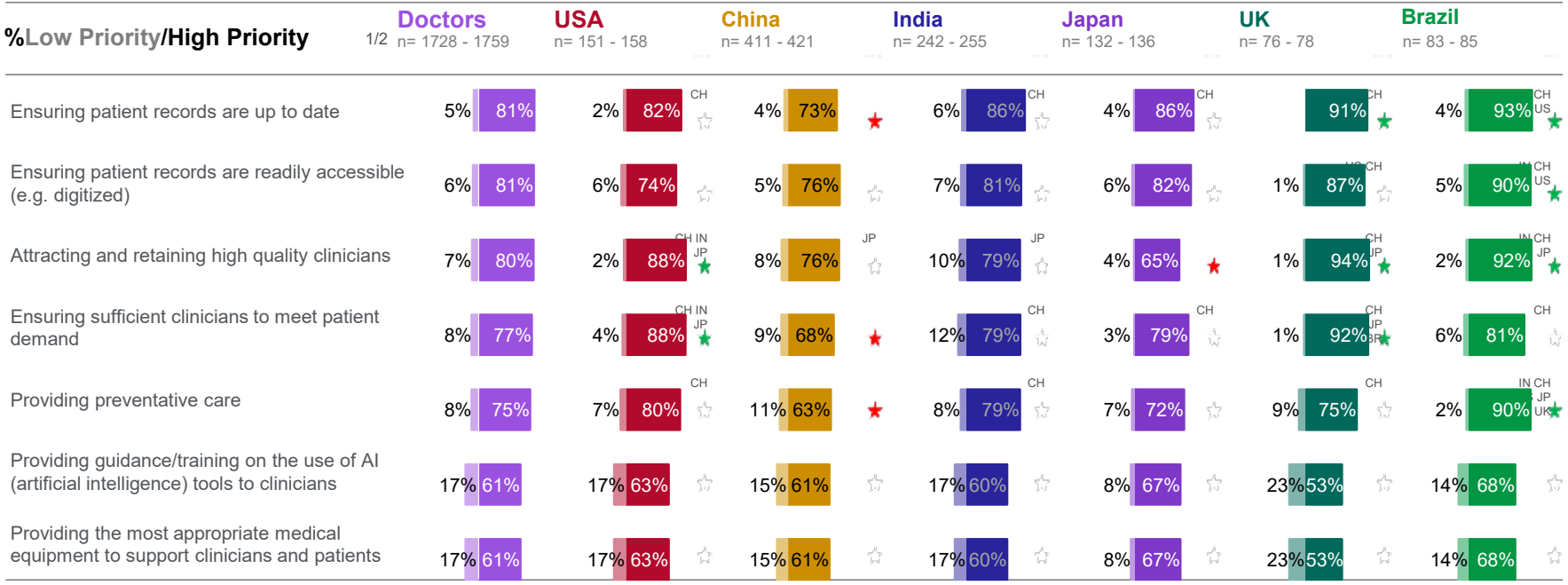
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

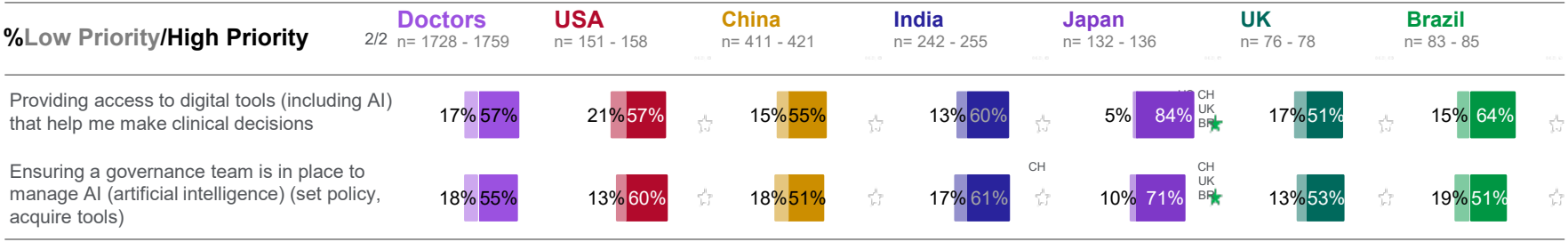
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Nurses' priorities for their institutions

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

ELSEVIER

Back to home

Priority should be assigned by my institution

%Low Priority/High Priority	Nurses 1/2 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%	3% 88%	3% 90%	
Providing preventative care	5% 88%	3% 92%	2% 85%	6% 89%	3% 91%	3% 94%	
Ensuring patient records are readily accessible (e.g. digitized)	4% 86%	7% 81%	2% 92%	9% 85%	88%	3% 87%	Too few responses
Attracting and retaining high quality clinicians	4% 85%	5% 88% IN	2% 90% IN	69%	3% 87%	3% 97% IN	
Ensuring sufficient clinicians to meet patient demand	6% 83%	5% 87%	5% 80%	9% 74%	3% 88%	3% 97% CH N	
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	19% 63%	16% 67% IN JP	22% 70% IN JP UK	32% 29%	22% 47%	19% 48%	
Providing the most appropriate medical equipment to support clinicians and patients	19% 63%	16% 67% IN JP	22% 70% IN JP UK	32% 29%	22% 47%	19% 48%	

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Nurses' priorities for their institutions

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

Back to home

Priority should be assigned by my institution

%Low Priority/High Priority	Nurses 2/2 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
Providing access to digital tools (including AI) that help me make clinical decisions	15% 55%	17% 58%	12% 51%	27% 39%	6% 50%	13% 55%	Too few responses
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	21% 54%	18% 56%	19% 57%	44% 28% ★	23% 48%	16% 52%	

IN

IN

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

Clinicians' priorities for national governments

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

Back to home

Priority should be assigned by my national government

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Clinicians' priorities for national governments

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

Back to home

Priority should be assigned by my national government

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Doctors' priorities for national governments

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

Priority should be assigned by my national government

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

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

Back to home

Priority should be assigned by my national government

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Clinicians' priorities for national governments

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

Priority should be assigned by my national government

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

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

Back to home

Priority should be assigned by my national government

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

By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

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%)

Back to home

Priority should be assigned by my national government

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

Too few responses

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Clinicians' views of institutional performance

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

Back to home

Performance by my institution

%Very Poor / Poor & Very Good / Good	1/2 Clinicians n= 2091 - 2174	Doctors n= 1693 - 1753	Nurses n= 398 - 421
Ensuring patient records are up to date	17% 63%	20% 54% ★	13% 73% ★
Ensuring patient records are readily accessible (e.g. digitized)	19% 63%	23% 56% ★	15% 70% ★
Providing the most appropriate medical equipment to support clinicians and patients	22% 57%	25% 49% ★	19% 65% ★
Providing preventative care	23% 50%	27% 41% ★	20% 59% ★
Attracting and retaining high quality clinicians	30% 48%	36% 39% ★	24% 56% ★
Ensuring sufficient clinicians to meet patient demand	33% 43%	38% 35% ★	28% 51% ★
Providing access to digital tools (including AI) that help me make clinical decisions	39% 32%	44% 28% ★	34% 36% ☆

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Clinicians' views of institutional performance

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

Back to home

Performance by my institution

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Clinicians' views of institutional performance

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

Back to home

Performance by my institution

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

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Clinicians' views of institutional performance

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

Back to home

Performance by my institution

%Very Poor / Poor & Very Good / Good 2/2	Clinicians n= 2091 - 2174	North America n= 245 - 264	South America n= 157 - 162	Europe n= 402 - 434	Asia Pacific n= 1133 - 1159	Middle East & Africa n= 139 - 146
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	45% 30%	47% 27% EU	65% 28% EU	59% 19%	36% 35% NA EU	46% 39% NA EU
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	40% 29%	41% 30% EU	56% 25%	48% 23%	34% 31% EU	44% 32% EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

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)

Back to home

Performance by my institution

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Doctors' views of institutional performance

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

Back to home

Performance by my institution

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

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

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)

Back to home

Performance by my institution

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Nurses' views of institutional performance

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

Back to home

Performance by my institution

%Very Poor / Poor & Very Good / Good 2/2	Nurses n= 398 - 421	North America n= 87 - 92	South America n= 31 - 32	Europe n= 73 - 81	Asia Pacific n= 169 - 178	Middle East & Africa n= 37 - 38
Providing access to digital tools (including AI) that help me make clinical decisions	34% 36%	31% 39%	40% 35%	49% 31%	25% 38%	46% 38%
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	35% 33%	42% 30%	45% 32%	41% 27%	30% 35%	35% 41%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

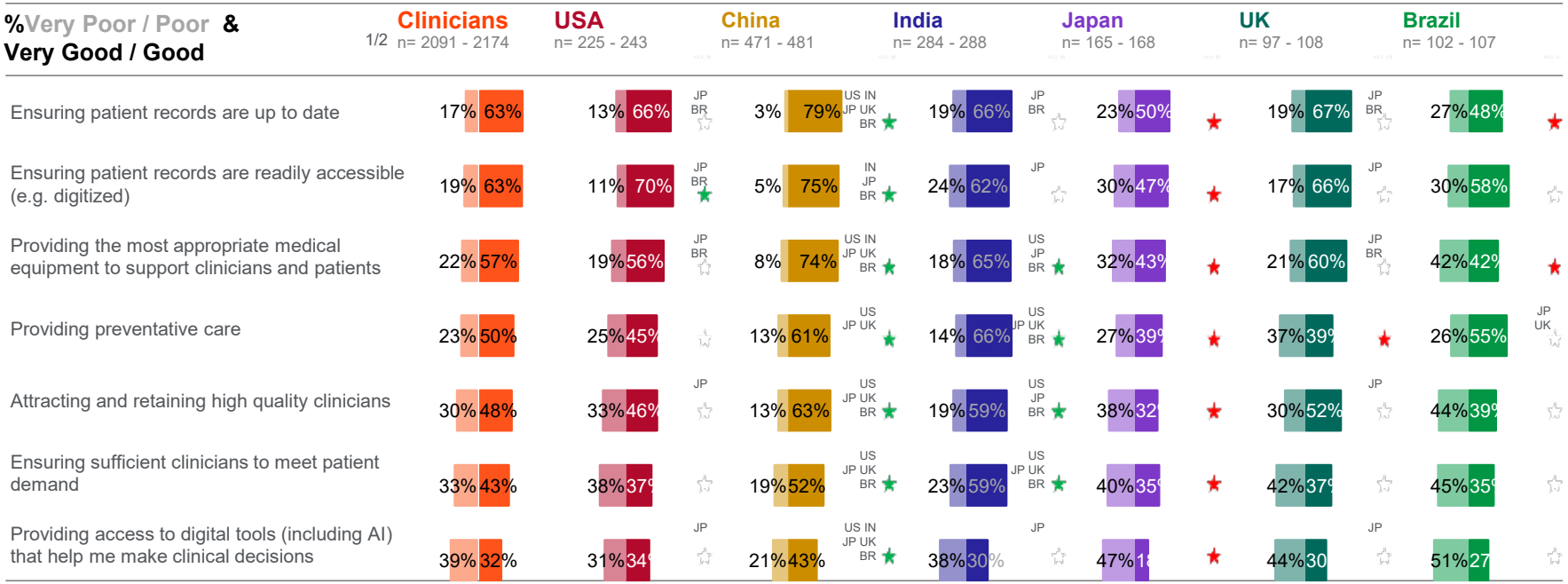
Clinicians' views of institutional performance

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

ELSEVIER

Back to home

Performance by my institution



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Clinicians' views of institutional performance

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

ELSEVIER

Back to home

Performance by my institution

%Very Poor / Poor & Very Good / Good

2/2

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Doctors' views of institutional performance

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

Performance by my institution

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Doctors' views of institutional performance

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

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Performance by my institution

%Very Poor / Poor & Very Good / Good 2/2	Doctors n= 1693 - 1753	USA n= 143 - 156	China n= 412 - 421	India n= 249 - 254	Japan n= 134 - 136	UK n= 70 - 77	Brazil n= 80 - 84
Ensuring a governance team is in place to manage AI (artificial intelligence) (set policy, acquire tools)	45% 25%	38% 31% JP ☆	22% 32% JP ★	45% 30% JP ☆	70% 12% ★	40% 24% JP ☆	64% 23% JP ☆
Providing guidance/training on the use of AI (artificial intelligence) tools to clinicians	50% 23%	42% 21% JP UK ☆	23% 34% US IN JP UK BR ★	50% 26% JP UK ☆	71% 9% ★	67% 10% ★	70% 22% JP UK ☆

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

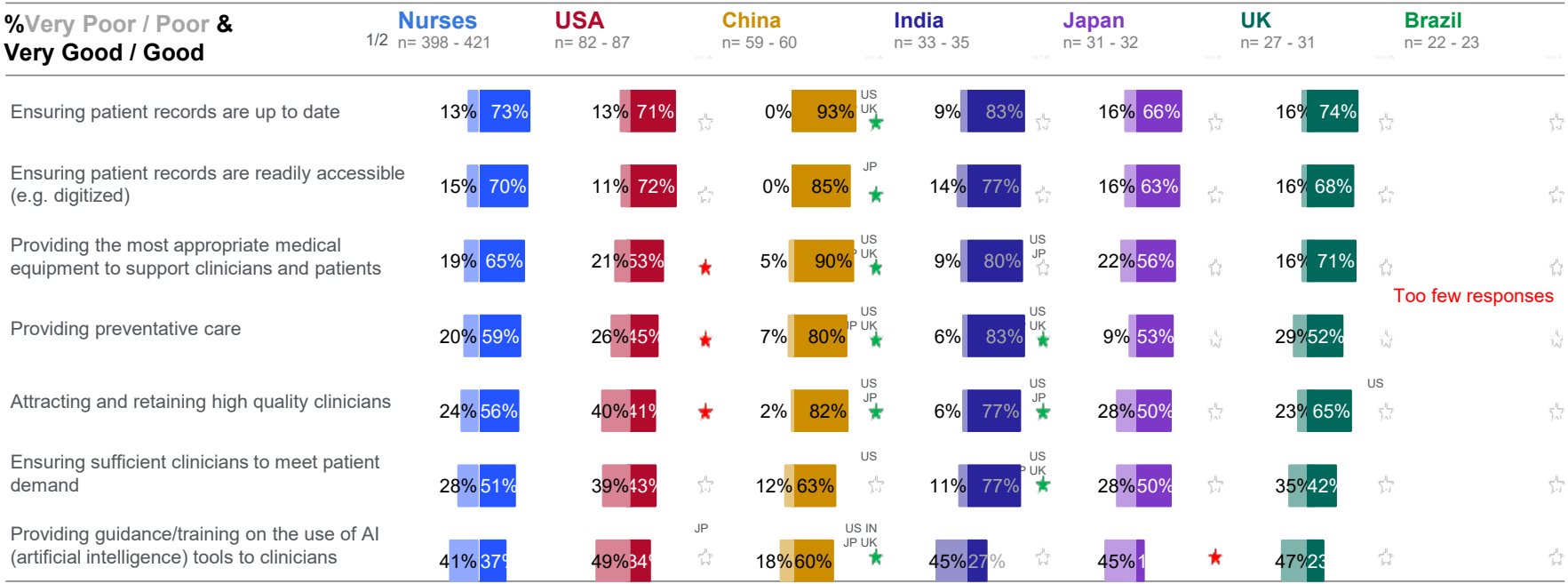
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Nurses' views of institutional performance

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

Performance by my institution



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

Nurses' views of institutional performance

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

Performance by my institution

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Clinicians' views of national government performance

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

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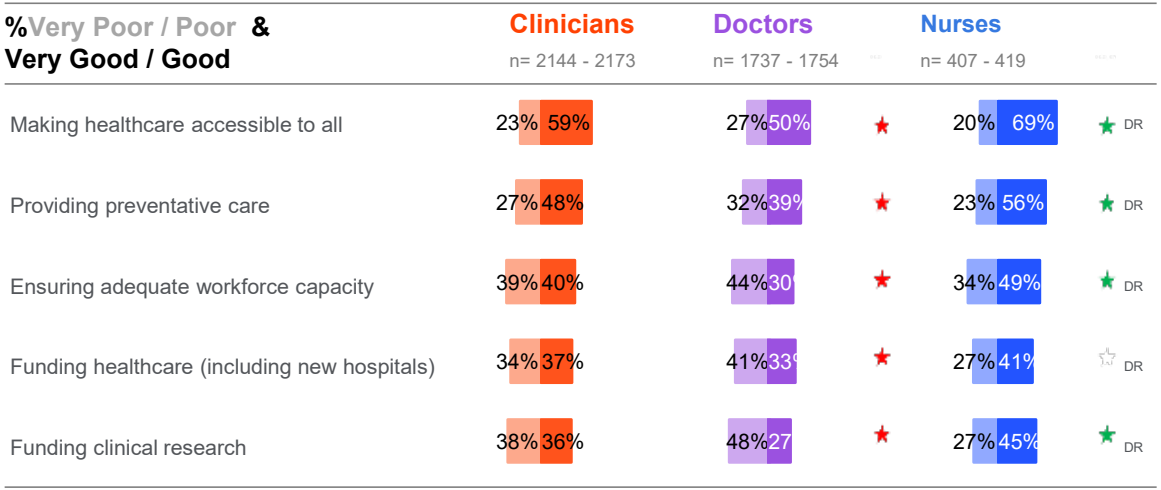
Performance by my national government



Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Clinicians' views of national government performance

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

Performance by my national government

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

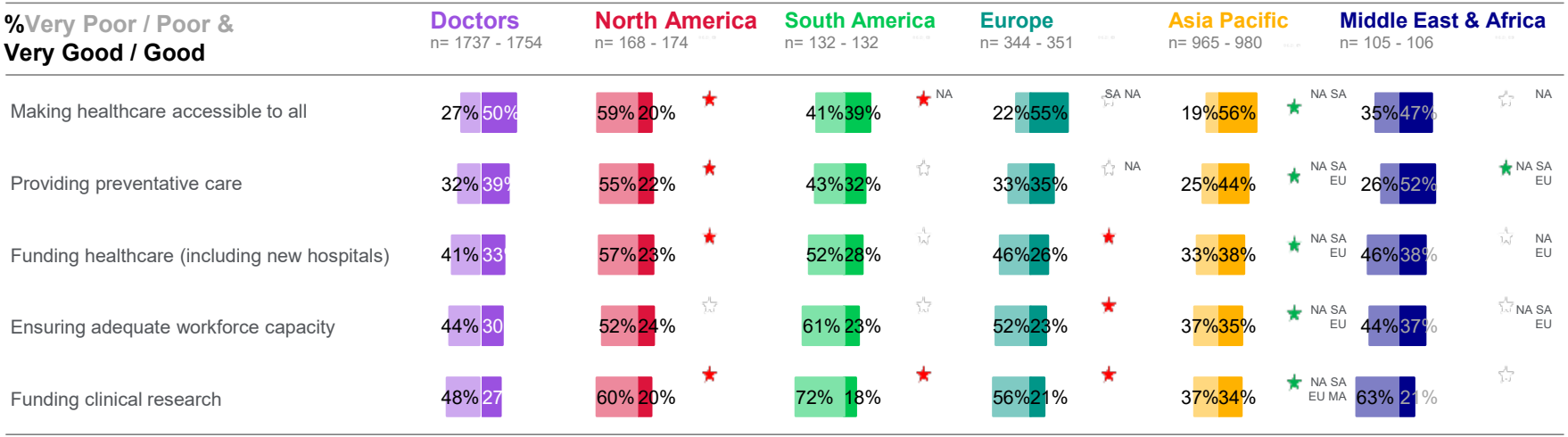
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Doctors' views of national government performance

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

Performance by my national government



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

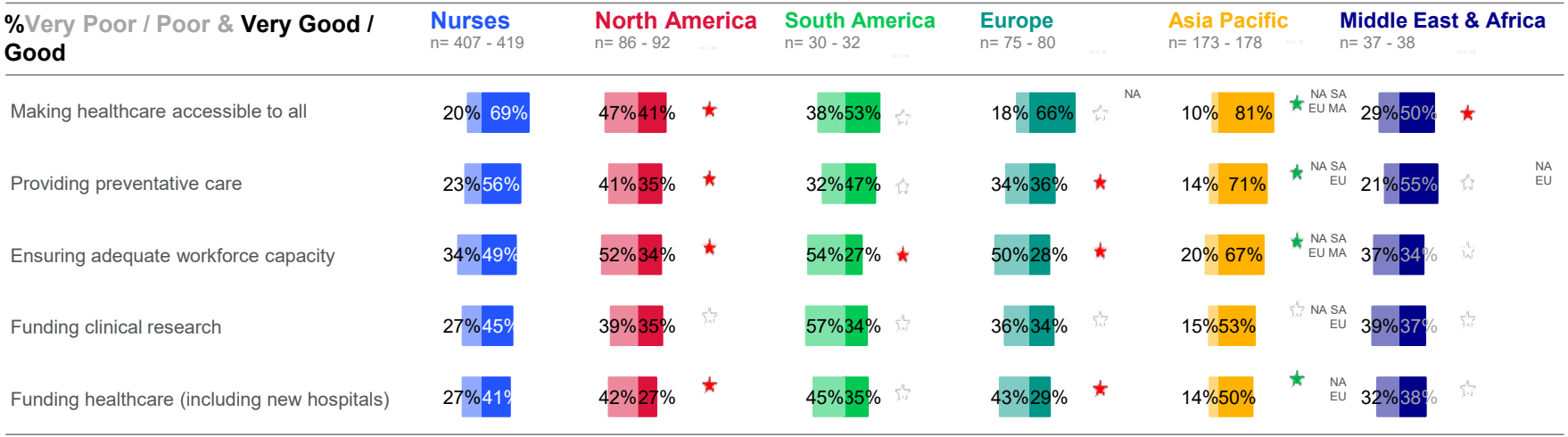
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

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



Back to home

By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

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

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

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)

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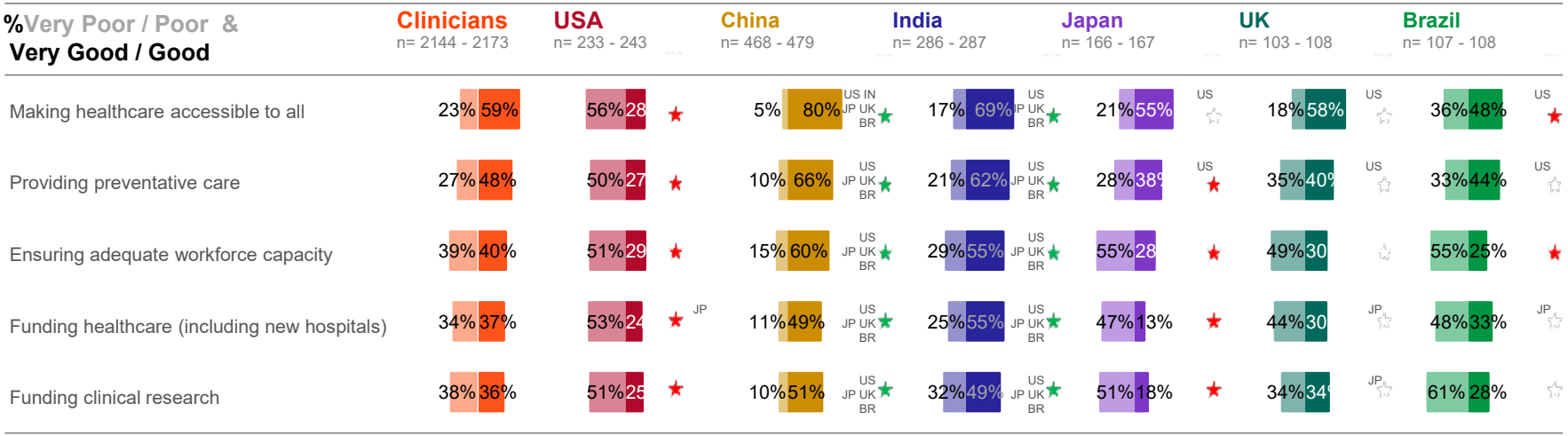
Performance by my national government



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

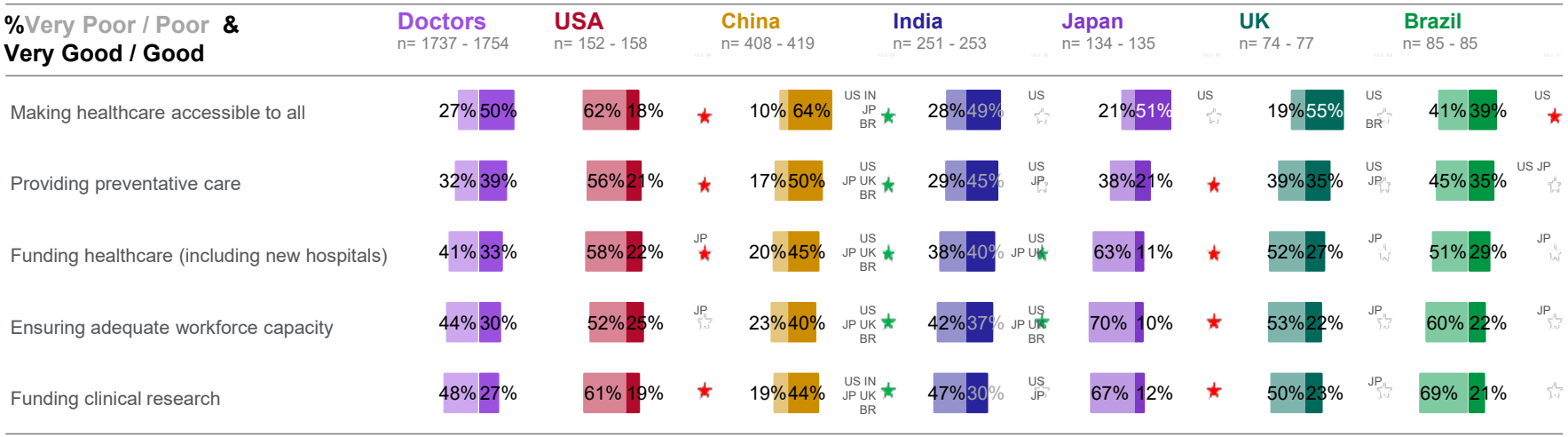
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Doctors' views of national government performance

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

Performance by my national government



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

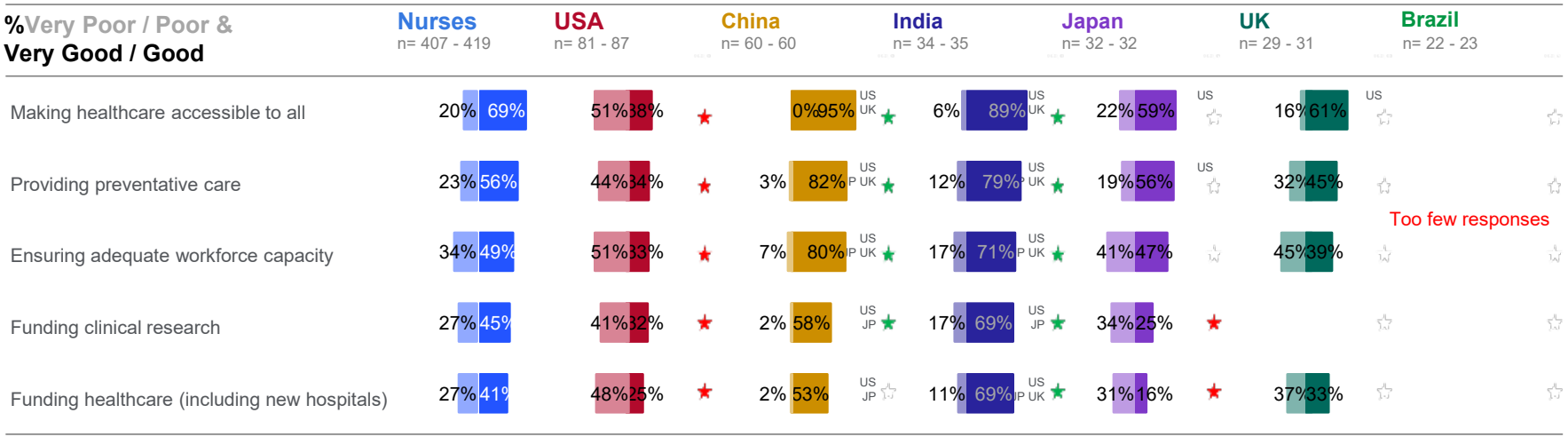
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Nurses' views of national government performance

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

Performance by my national government



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

AI Helping Transform Healthcare

How AI impacts clinicians

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

Back to home

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

Overall

Clinicians Doctors Nurses

Significantly higher/ lower than all clinicians

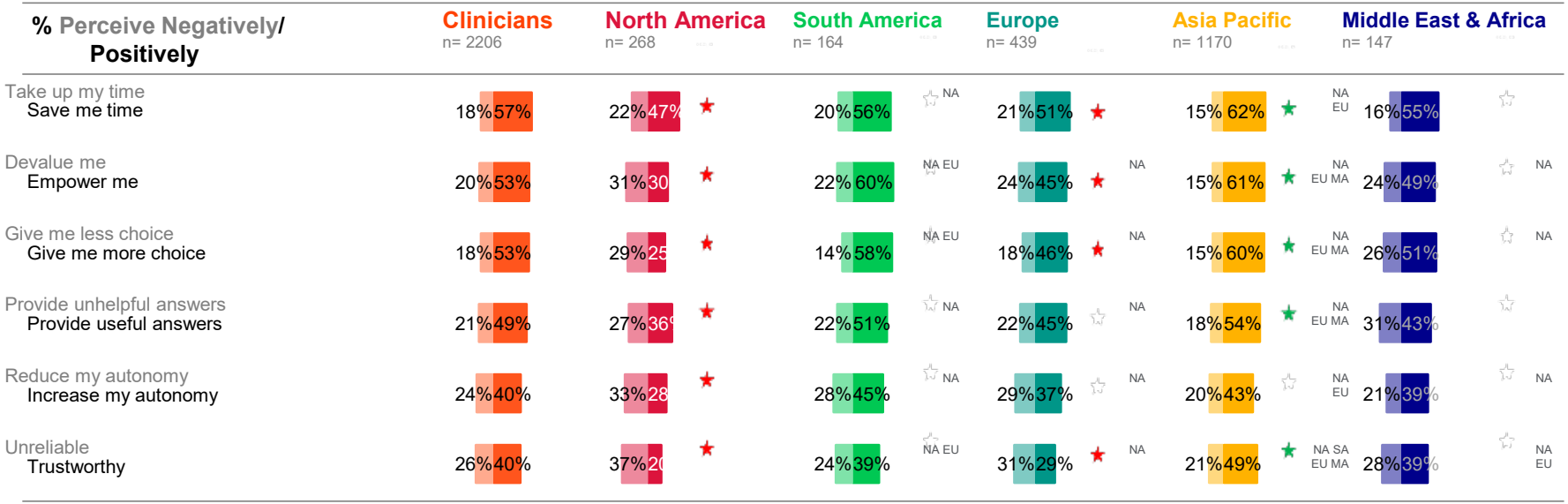
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

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

Base: n= 2206

How AI impacts clinicians

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

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%)

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Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: 1781

How AI impacts nurses

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

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

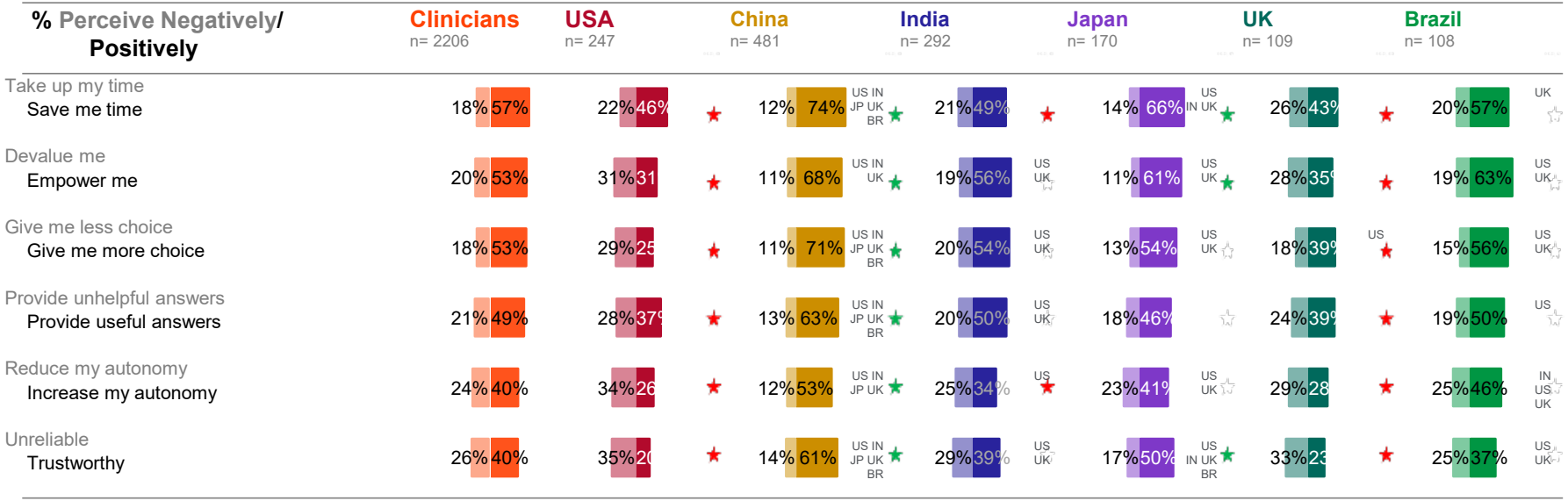
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: 425

How AI impacts clinicians

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

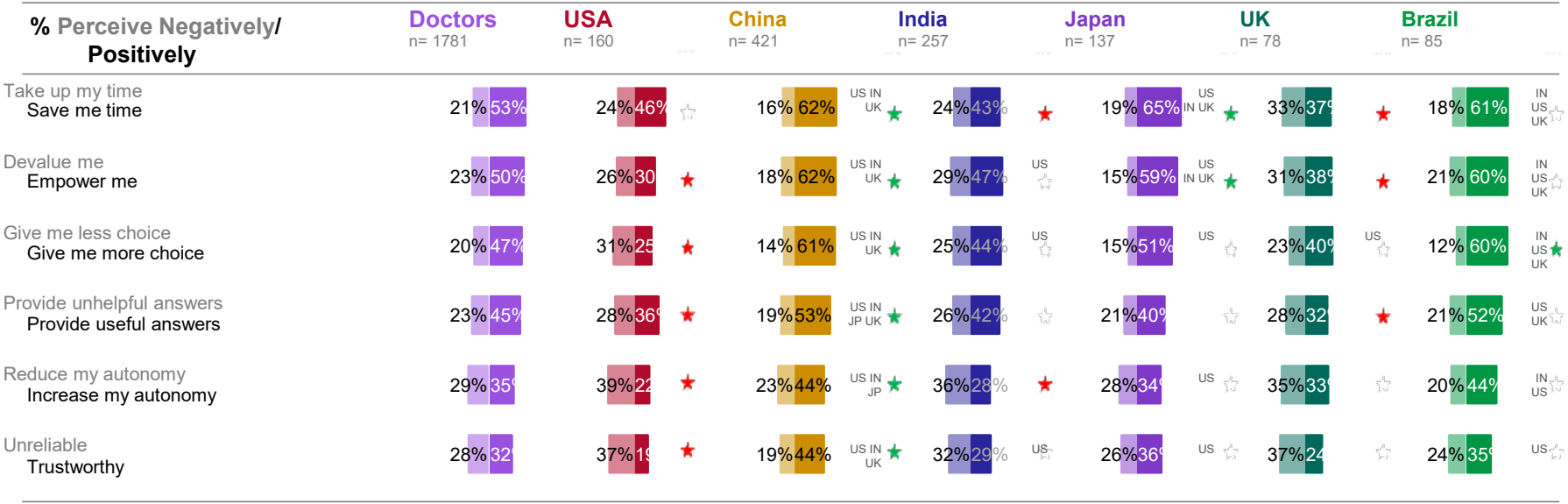
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Base: n= 2206

How AI impacts doctors

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



By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

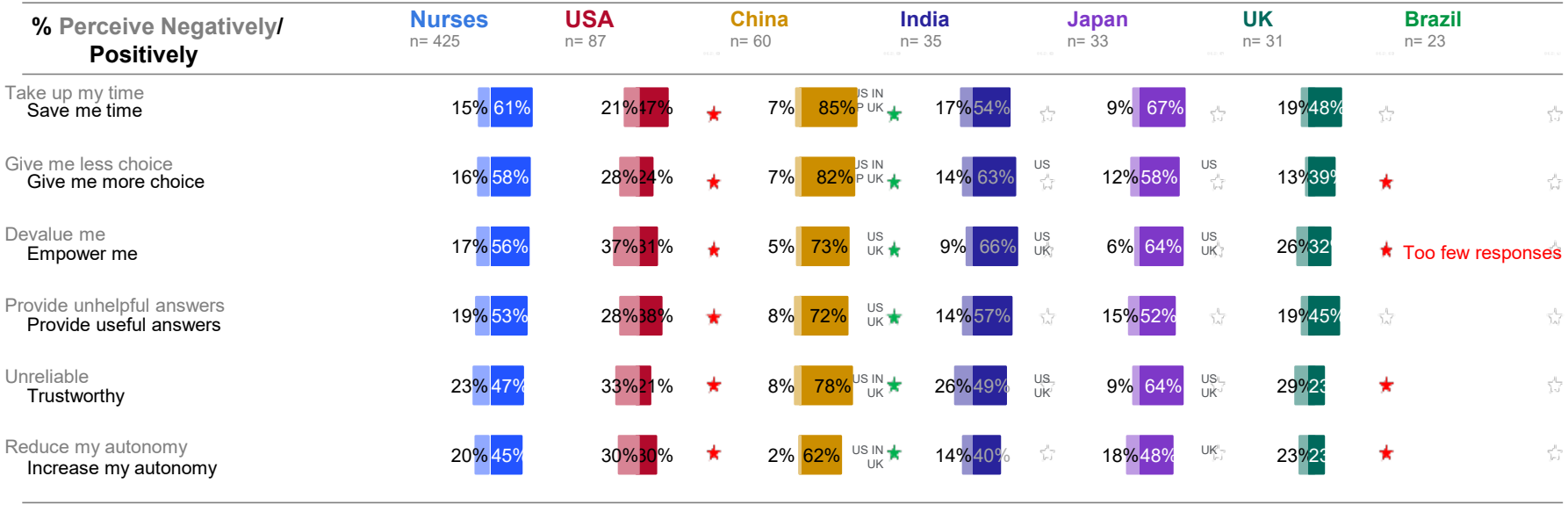
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Base: 1781

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

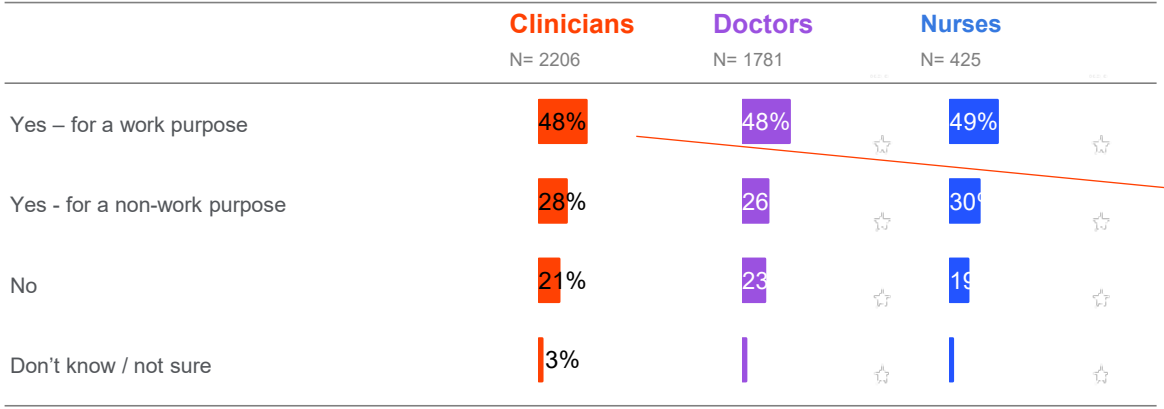
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Base: 425

Are AI tools used in clinical practice?

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



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

Overall

Clinicians | Doctors | Nurses

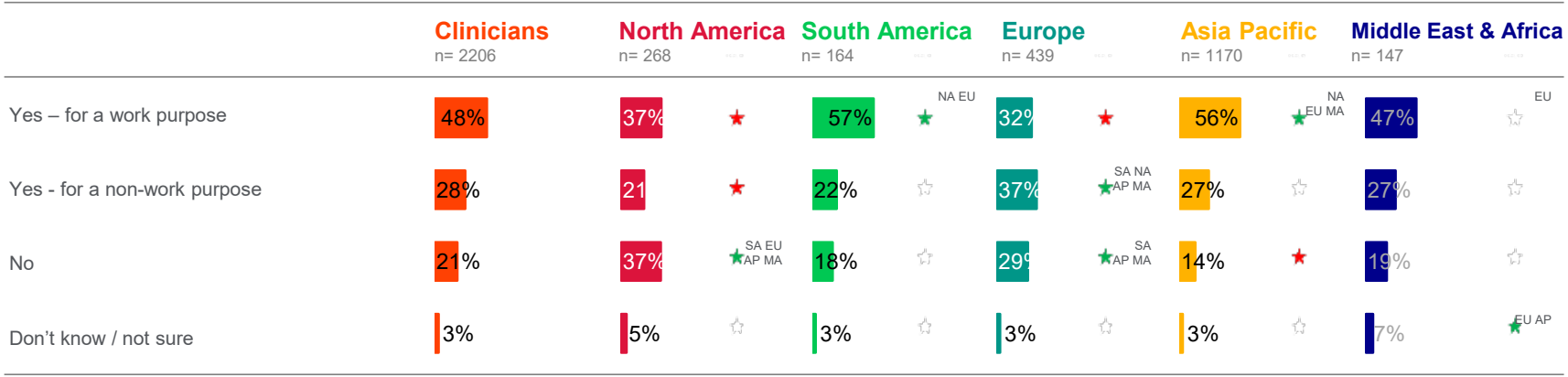
Significantly higher/ lower than all clinicians
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

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

Base: n= 2206

Are AI tools used in clinical practice?

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



Back to home

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

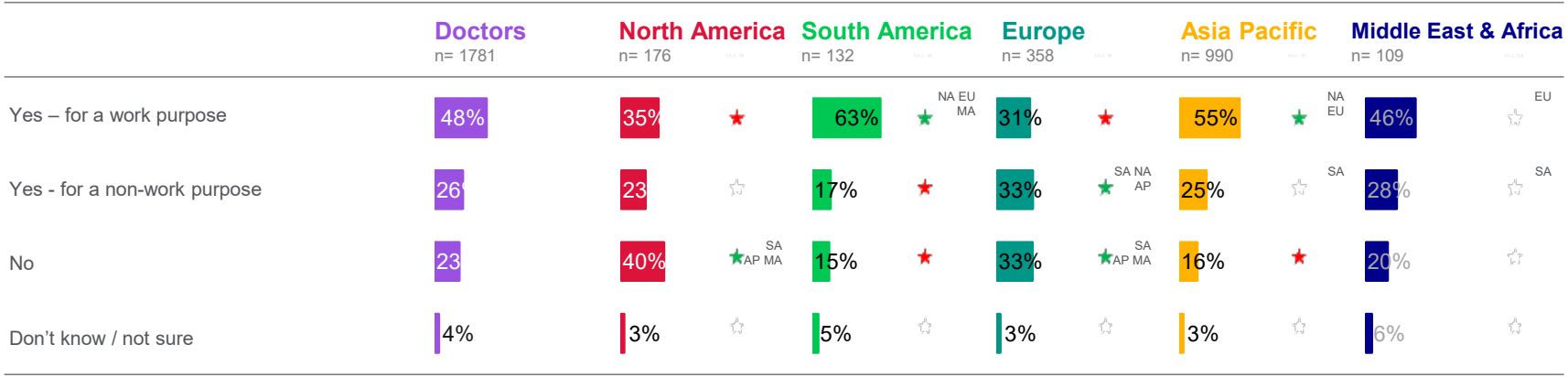
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 2206

Are AI tools used in clinical practice?

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



Back to home

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

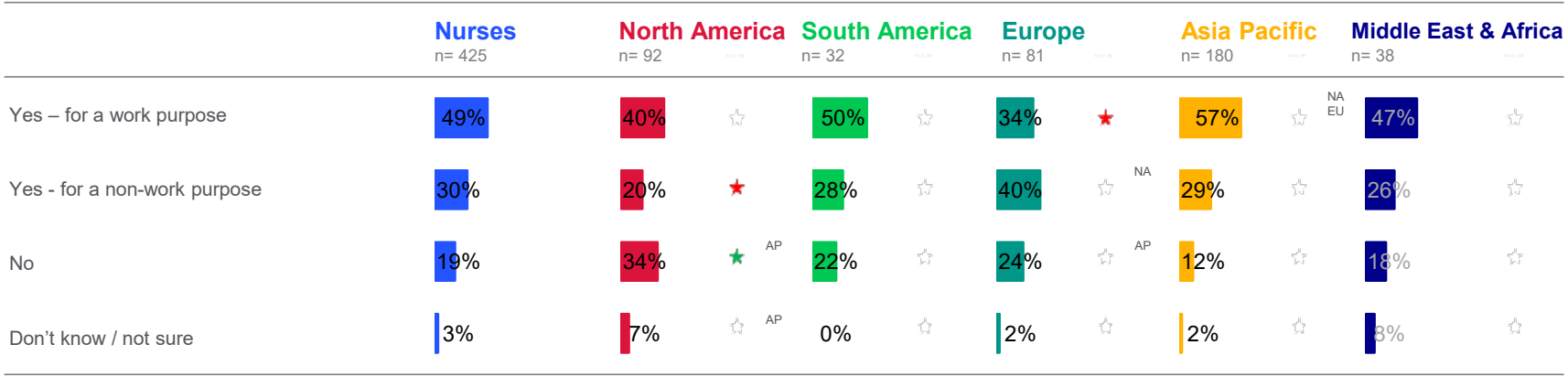
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 1781

Are AI tools used in clinical practice?

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



Back to home

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 425

Are AI tools used in clinical practice?

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

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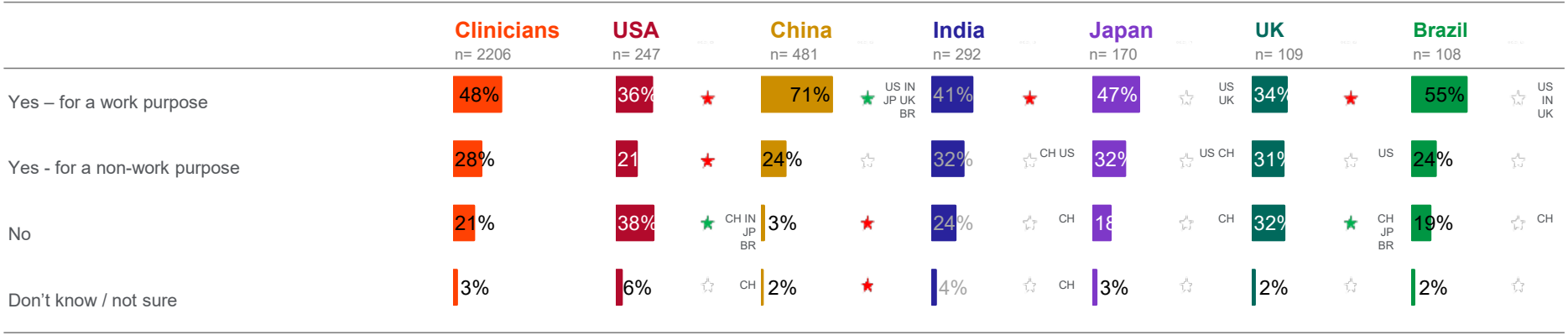


By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

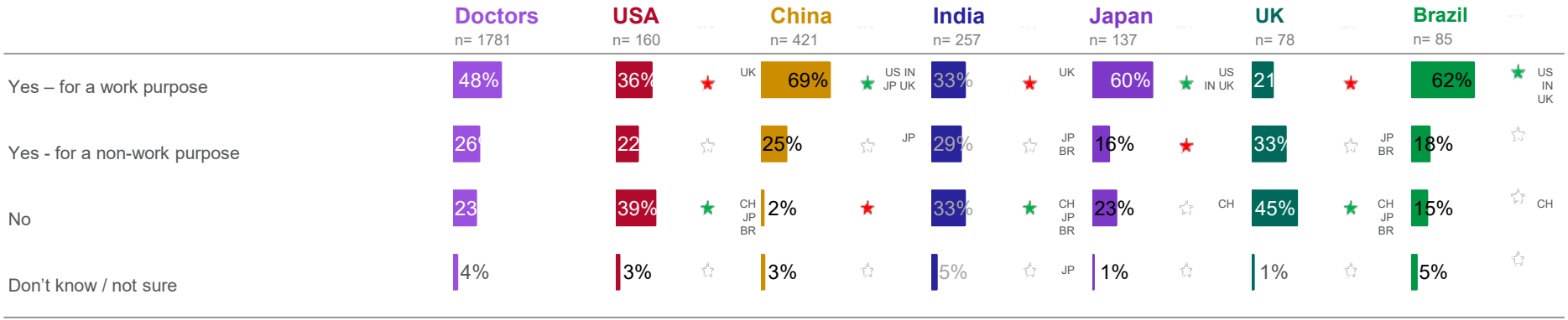
Question: Do you use an AI (including generative AI) product?

Base: n= 2206

Are AI tools used in clinical practice?

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

Back to home



By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

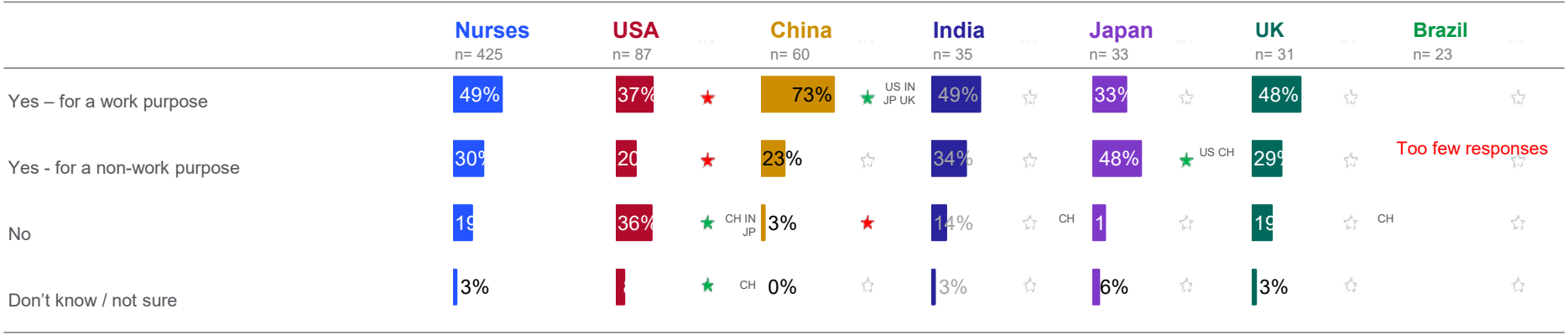
Base: n= 1781

Are AI tools used in clinical practice?

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

ELSEVIER

Back to home



By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

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

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

Base: n= 425

Use of generalist AI tools by clinicians in practice

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

Back to home

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

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Base: n= 1054

Use of generalist AI tools by clinicians in practice by region

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

ELSEVIER

Back to home

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

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 1054

Use of generalist AI tools by doctors in practice by region

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

ELSEVIER

Back to home

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

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: n= 863

Use of generalist AI tools by nurses in practice by region

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

ELSEVIER

Back to home

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

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

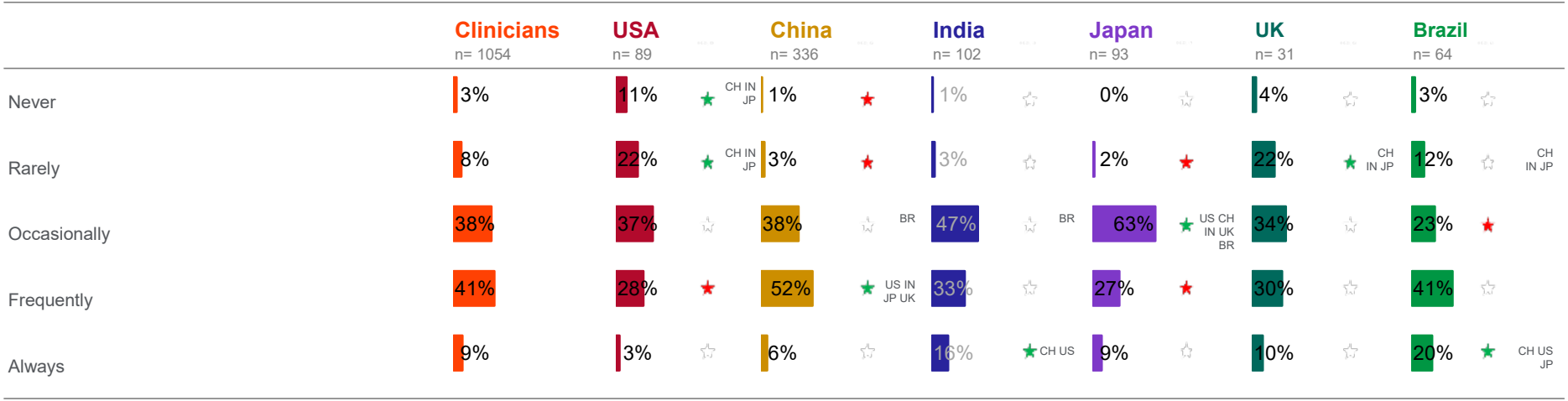
Base: n= 191

Use of generalist AI tools by clinicians in practice by country

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

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

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 1054

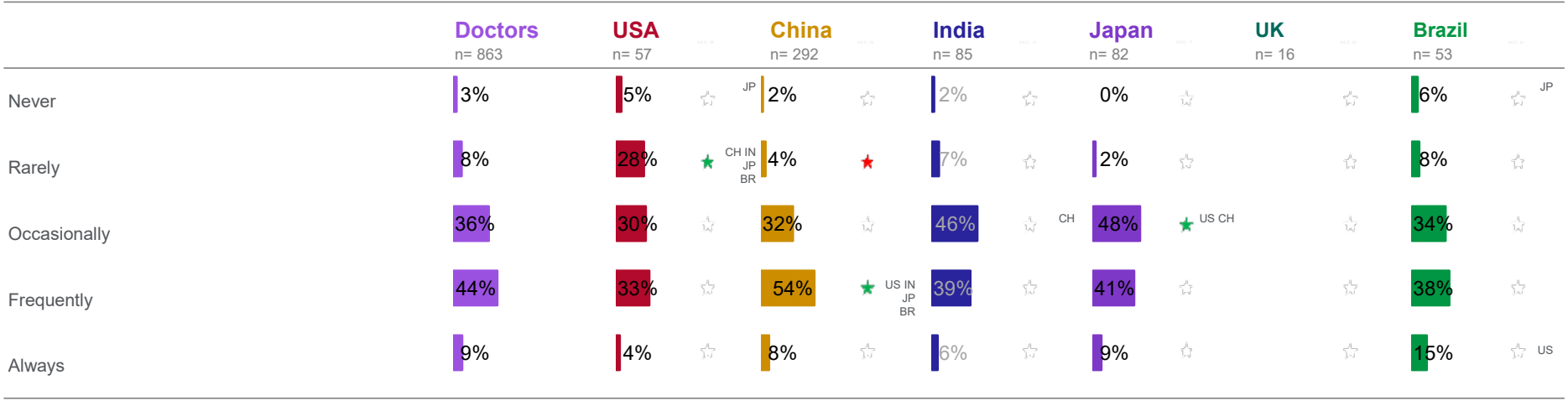
Use of generalist AI tools by doctors in practice by country

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

ELSEVIER

Back to home

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 863

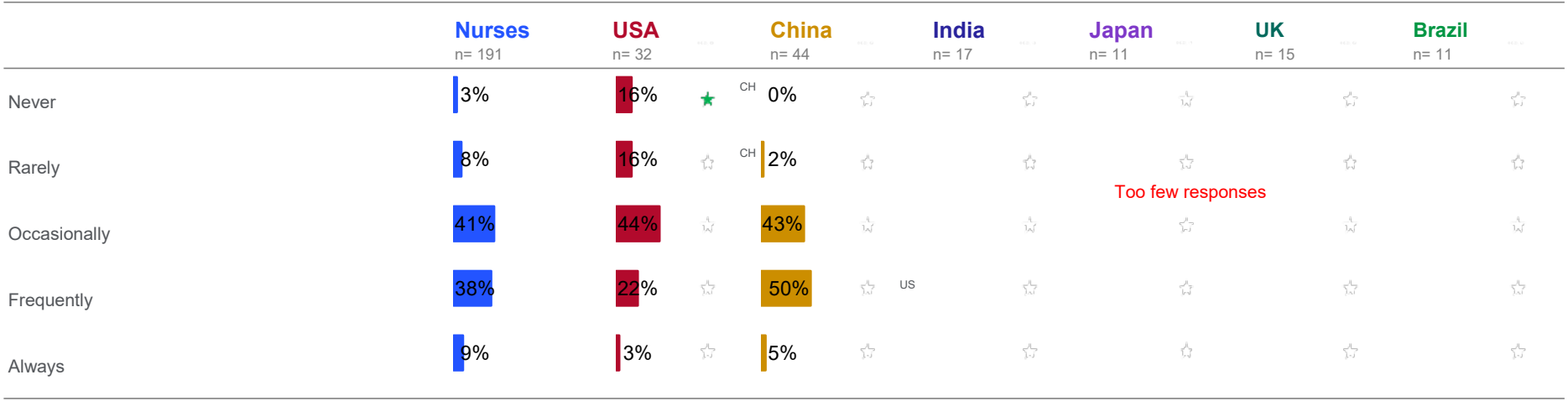
Use of generalist AI tools by nurses in practice by country

Of nurses who use AI for work, all have used a generalist AI tool in China (100%)

ELSEVIER

Back to home

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

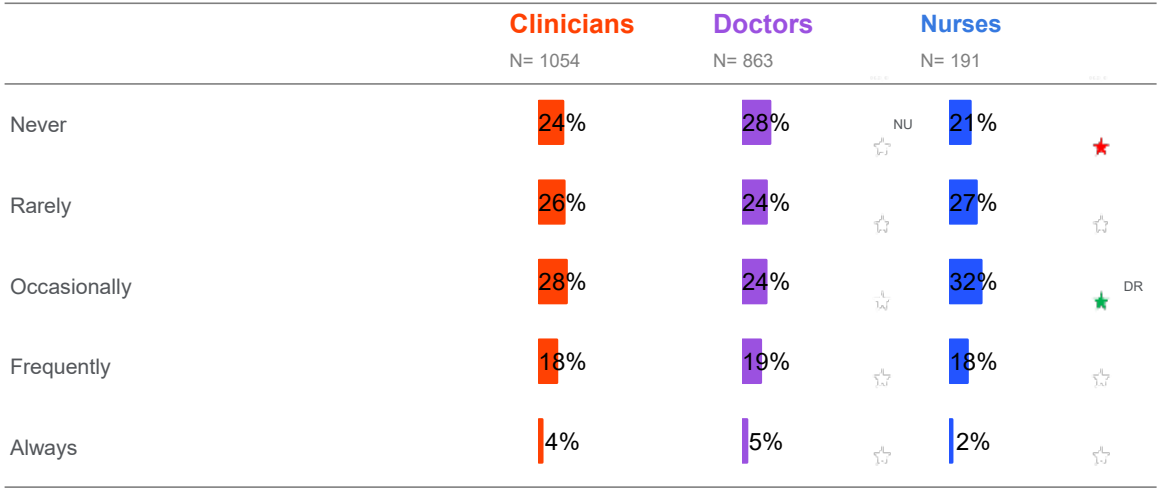
Base: n= 191

Use of clinical-specific AI tools by clinicians in practice

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

Back to home

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



Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 1054

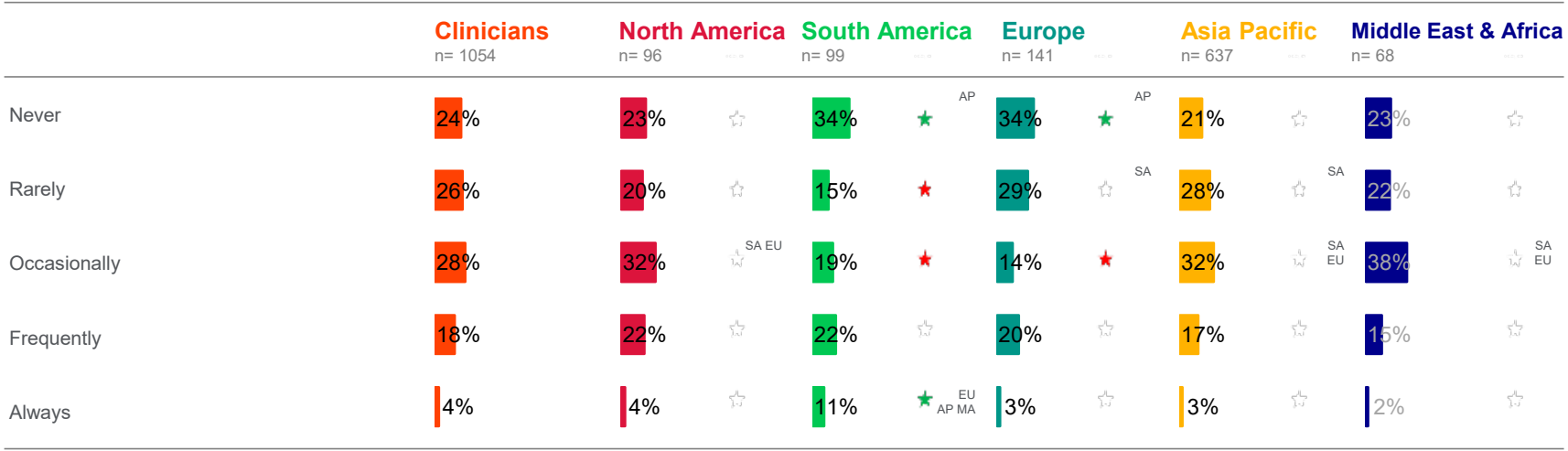
Use of clinical-specific AI tools by clinicians in practice by region

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

ELSEVIER

Back to home

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 1054

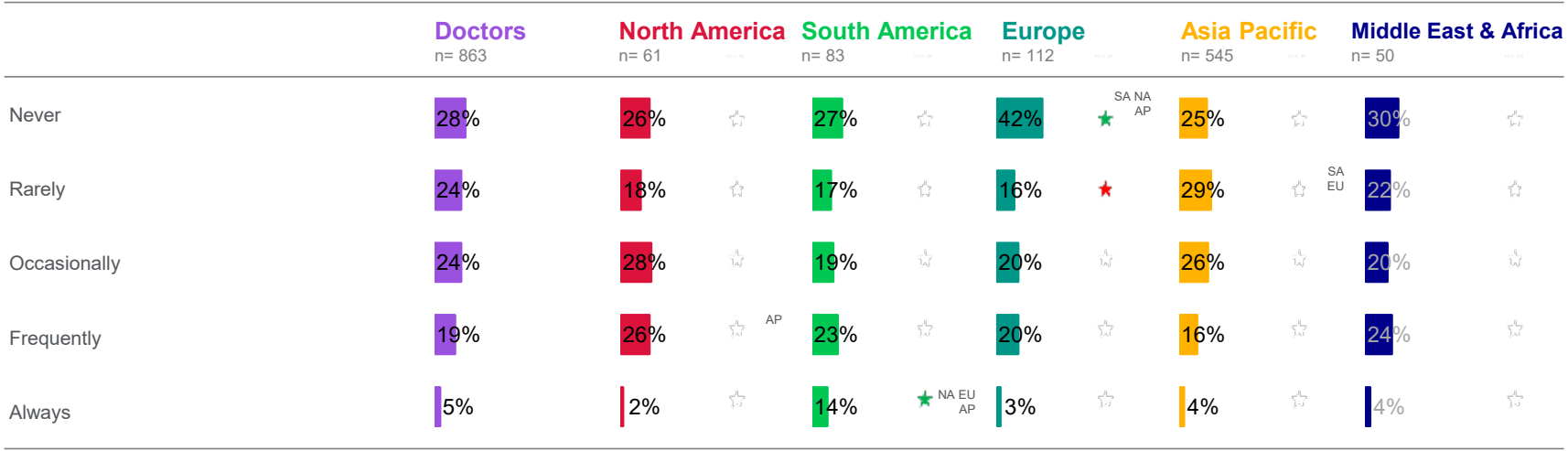
Use of clinical-specific AI tools by doctors in practice by region

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

ELSEVIER

Back to home

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 863

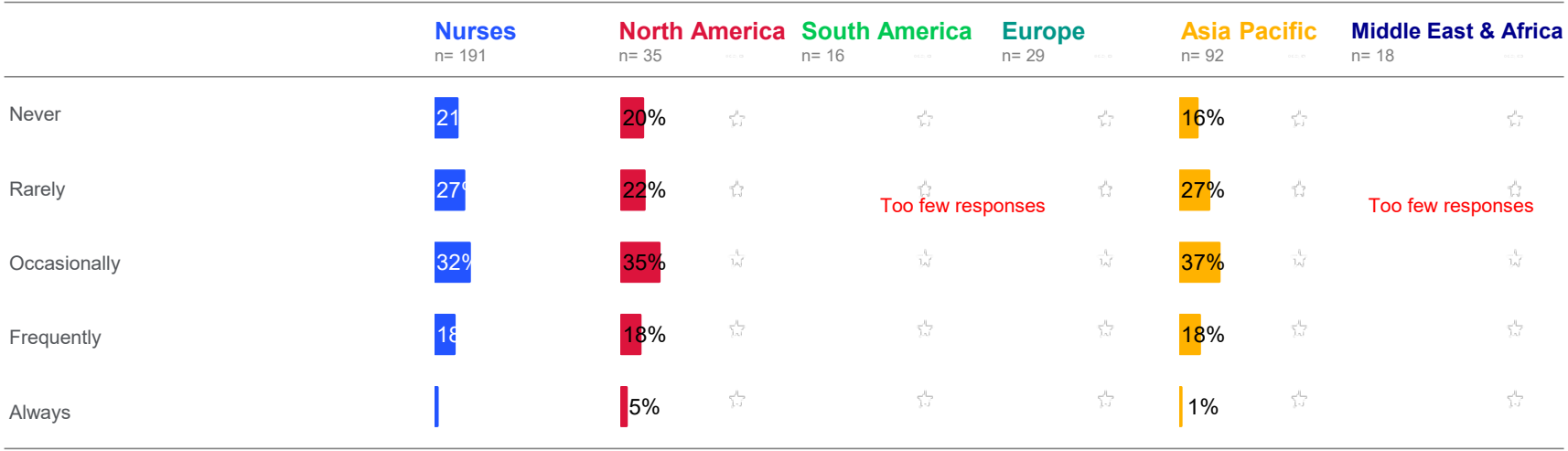
Use of clinical-specific AI tools by nurses in practice by region

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

ELSEVIER

Back to home

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 191

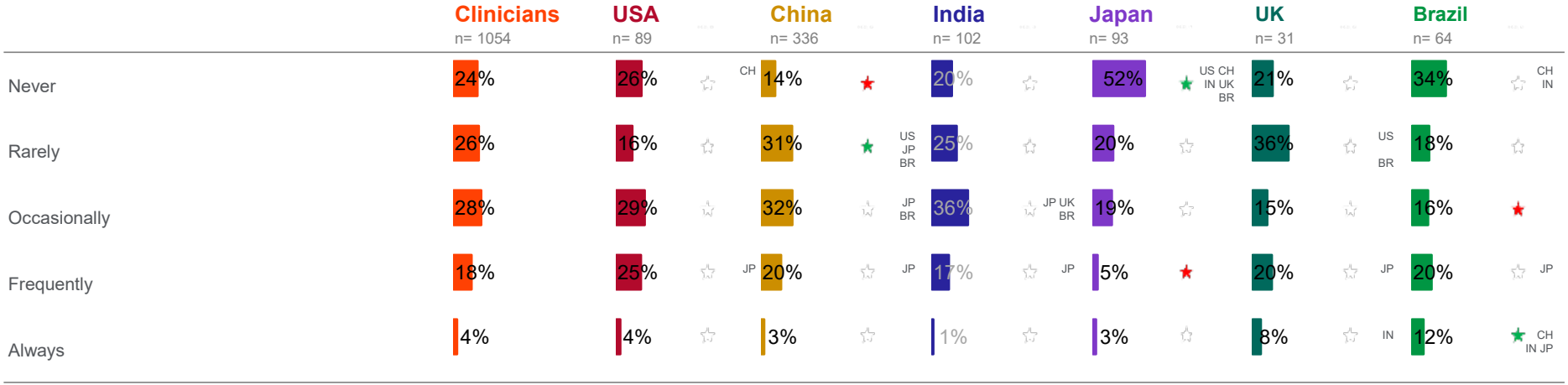
Use of clinical-specific AI tools by clinicians in practice by country

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

ELSEVIER

Back to home

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 1054

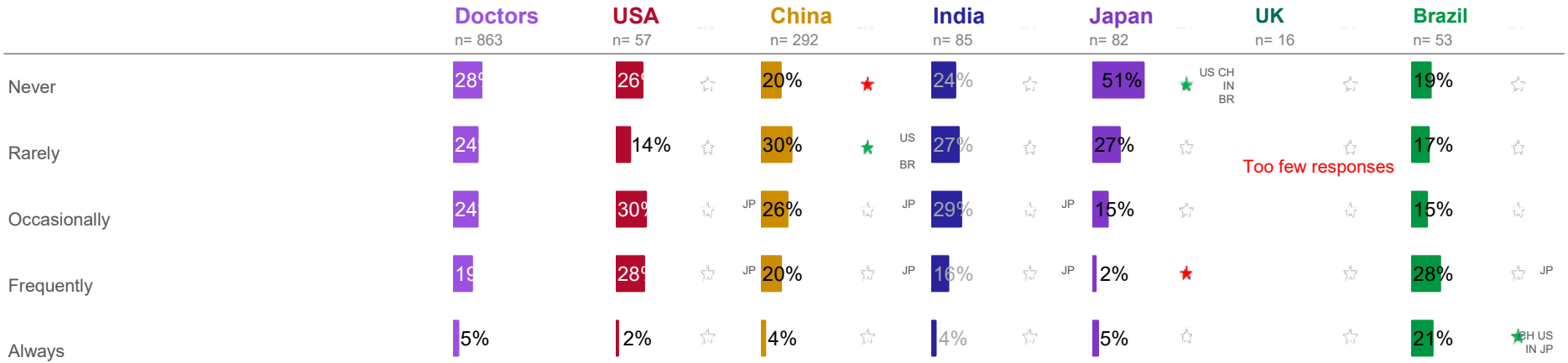
Use of clinical-specific AI tools by doctors in practice by country

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

ELSEVIER

Back to home

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 863

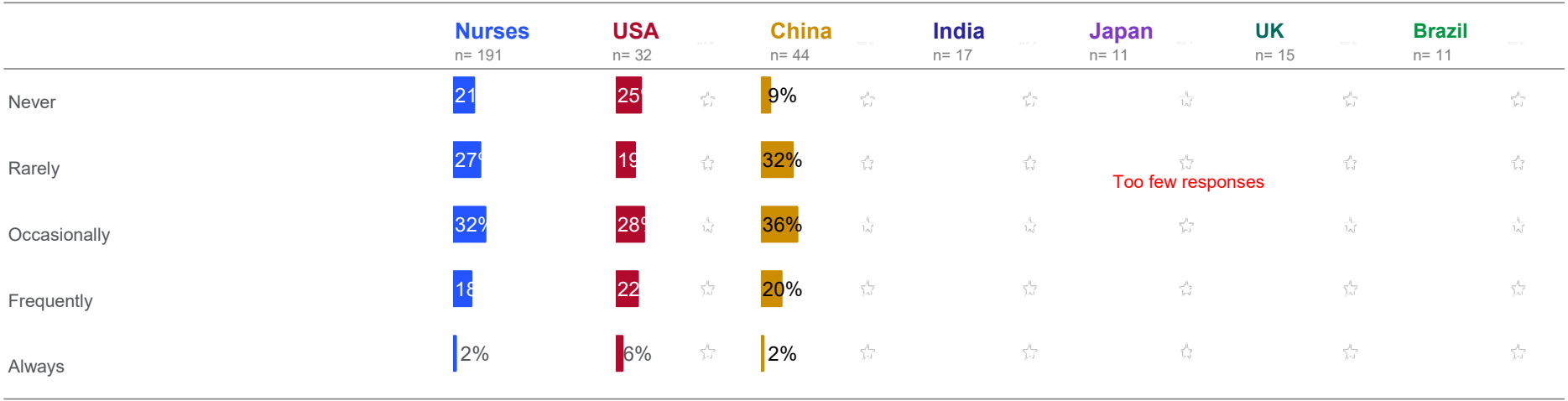
Use of clinical-specific AI tools by Nurses in practice by country

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

ELSEVIER

Back to home

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

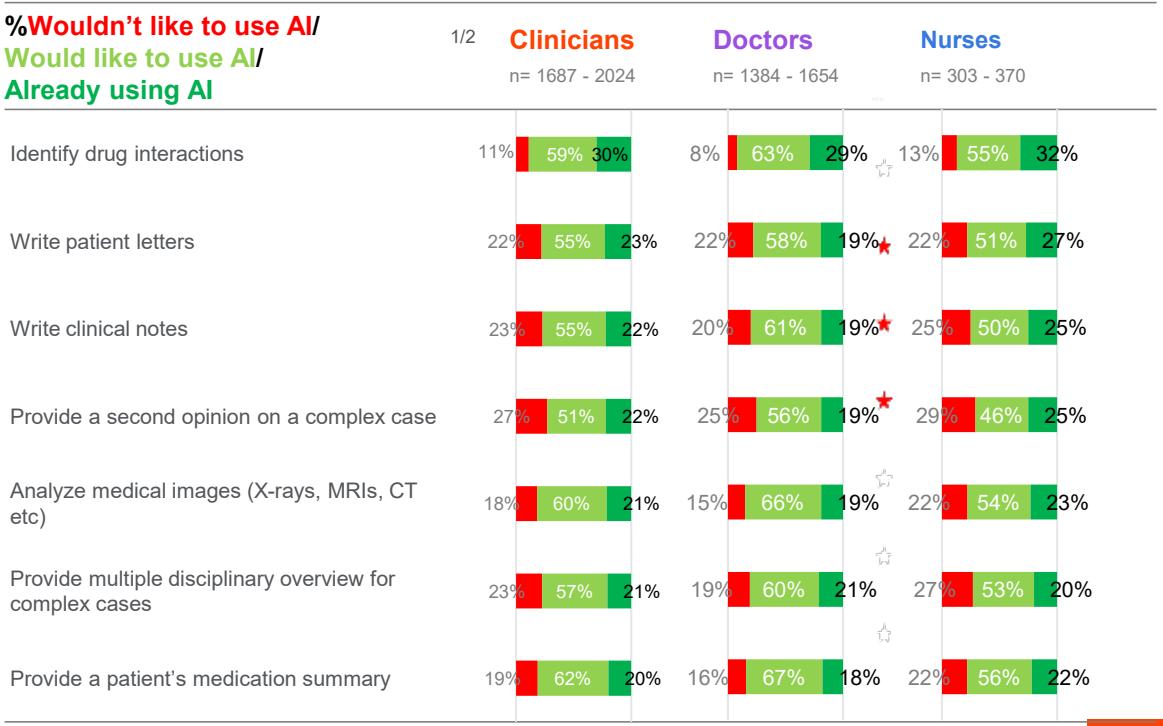
Question: Thinking about the use of AI tools, how often if at all, do you...
Only asked to those who use AI for work purposes.

Base: n= 191

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

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

Use of AI in your clinical setting to help with tasks



Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

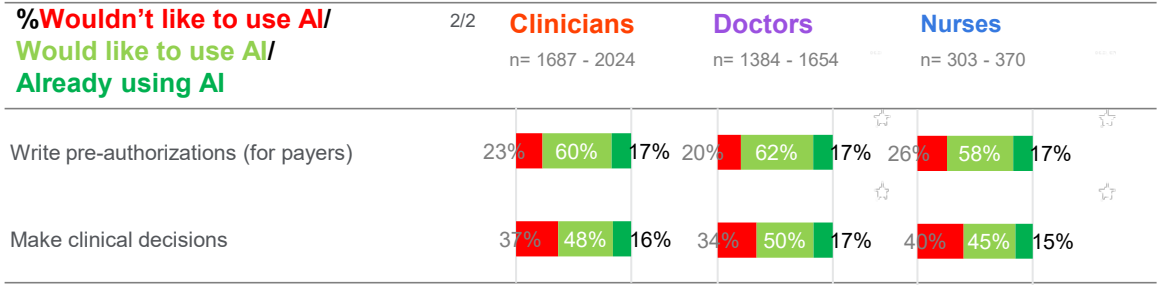
Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.

Base: n= 2024

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

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

Use of AI in your clinical setting to help with tasks



Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Base: n= 2024

Clinicians current use of clinical-specific AI tools in practice

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

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

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

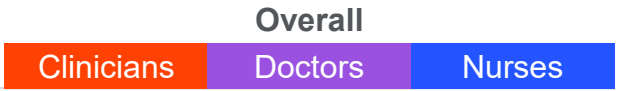
Base: n= 2024

Clinicians current use of clinical-specific AI tools in practice

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

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

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



Significantly higher/ lower than all clinicians

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

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

Base: n= 2024

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

Fewer clinicians in Europe are using (any) AI tools to help with all listed tasks than globally (1/2)

Use of AI in your clinical setting to help with tasks

%Wouldn't like to use AI/Already using AI 1/2	Clinicians n= 1687 - 2024	North America n= 203 - 235	South America n= 131 - 156	Europe n= 256 - 398	Asia Pacific n= 968 - 1092	Middle East & Africa n= 117 - 137
Identify drug interactions	11% 30%	14% 29% ☆ EU	6% 31% ☆ EU	11% 21% ★	11% 33% ☆ EU	12% 36% ☆ EU
Write patient letters	22% 23%	22% 21% ☆	24% 26% ☆ EU	28% 18% ★	19% 25% ☆ EU	27% 21% ☆
Write clinical notes	23% 22%	26% 21% ☆	20% 17% ☆	29% 18% ☆	19% 24% ☆ EU	26% 24% ☆
Provide a second opinion on a complex case	27% 22%	42% 13% ★	20% 17% ☆	37% 11% ★	23% 27% ★ NA SA EU	18% 34% ★ NA SA EU
Analyze medical images (X-rays, MRIs, CT etc)	18% 21%	28% 10% ★	13% 10% ★	17% 17% ☆ SA NA	18% 27% ★ NA SA EU MA	16% 18% ☆ NA
Provide multiple disciplinary overview for complex cases	23% 21%	33% 12% ★	17% 14% ☆	24% 14% ★	22% 26% ★ NA SA EU	15% 23% ☆ NA SA EU
Provide a patient's medication summary	19% 20%	24% 16% ☆ EU	12% 15% ☆	22% 10% ★	18% 24% ★ NA SA EU	18% 24% ☆ NA EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Base: 2024

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

Fewer clinicians in Europe are using (any) AI tools to help with all listed tasks than globally (2/2)

Back to home

Use of AI in your clinical setting to help with tasks

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

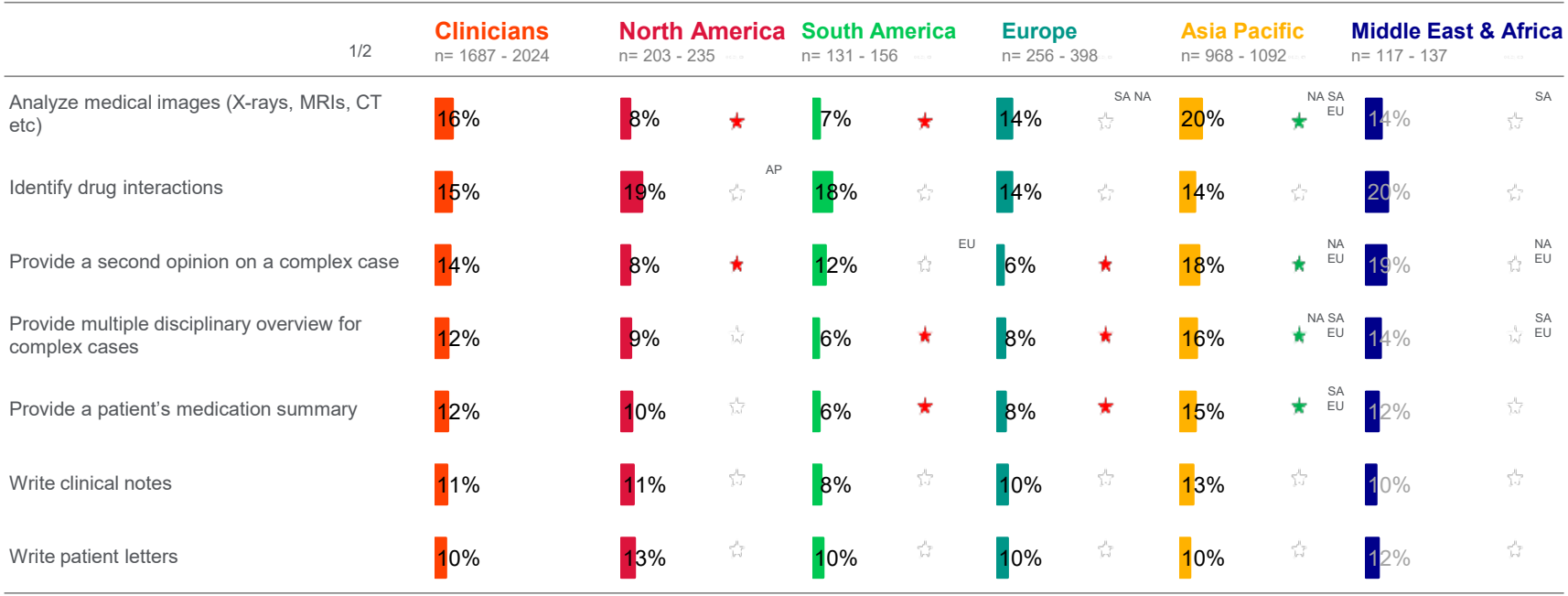
Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to?
"Don't know / not applicable" answers are excluded from the responses.

Base: 2024

How clinicians use clinical-specific AI tools in clinical practice

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

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



Back to home

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

Question: 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 clinical-specific AI tools in clinical practice

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

ELSEVIER

Back to home

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

2/2

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Base: n= 2024

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

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

Use of AI in your clinical setting to help with tasks

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: 1654

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

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

Back to home

Use of AI in your clinical setting to help with tasks

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: 1654

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

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

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

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

By Region

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1654

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

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

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

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

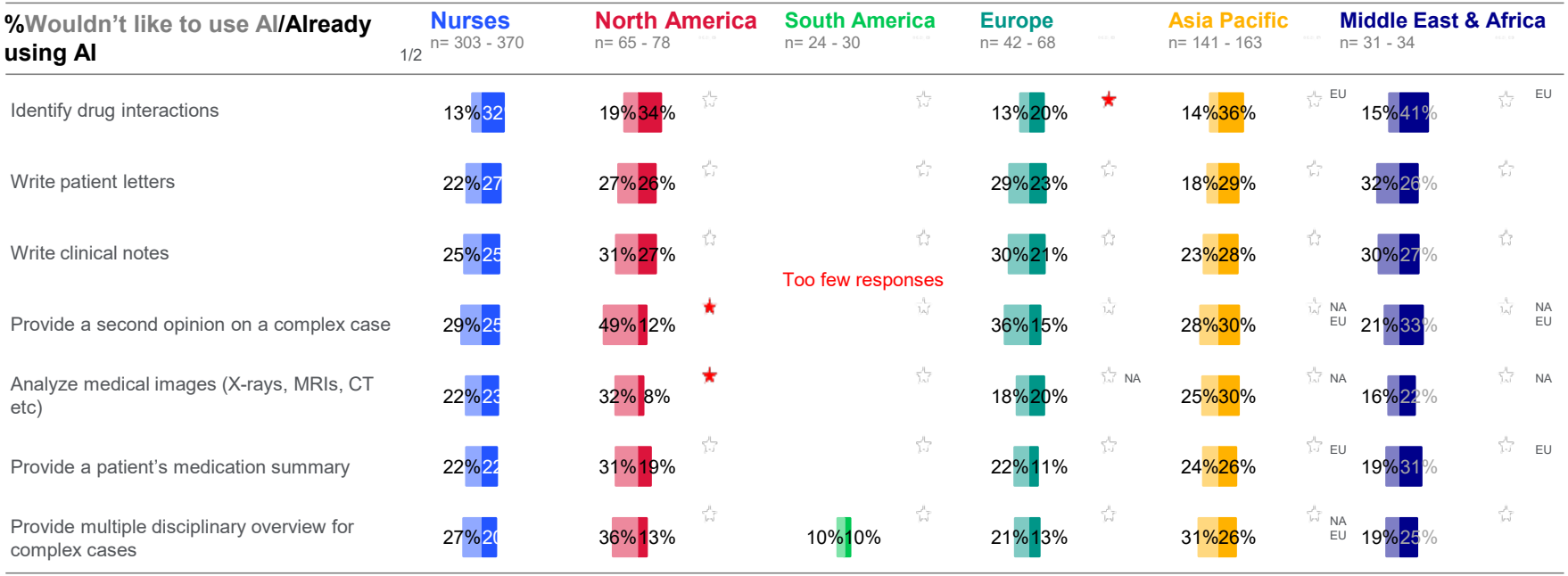
Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.

Base: n= 1654

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

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

Use of AI in your clinical setting to help with tasks



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: 370

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

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

Use of AI in your clinical setting to help with tasks

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: 370

Nurses current use of clinical-specific AI tools in practice

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

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

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

Base: n= 370

Nurses current use of clinical-specific AI tools in practice

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

ELSEVIER

Back to home

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

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

EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

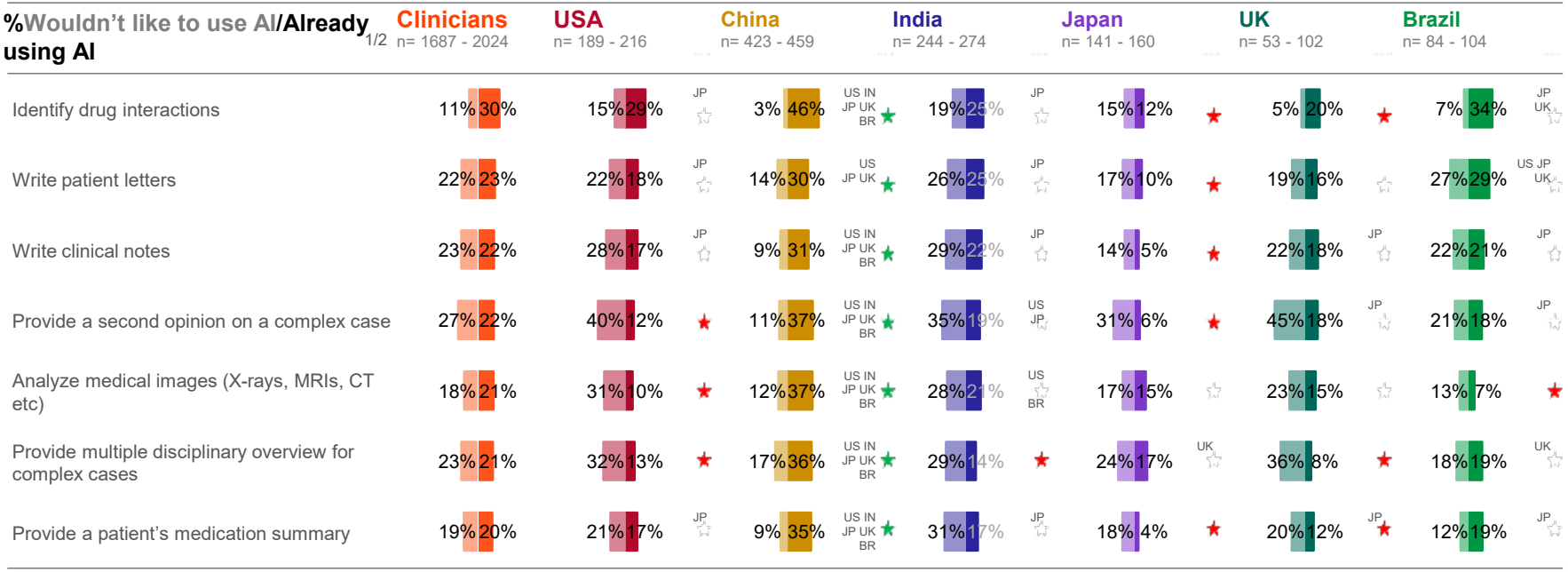
Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.

Base: n= 370

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

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

Use of AI in your clinical setting to help with tasks



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: 2024

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

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

ELSEVIER

Back to home

Use of AI in your clinical setting to help with tasks

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Base: 2024

Clinicians current use of clinical-specific AI tools in practice

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

ELSEVIER

Back to home

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

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Base: n= 2024

Clinicians current use of clinical-specific AI tools in practice

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

ELSEVIER

Back to home

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

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

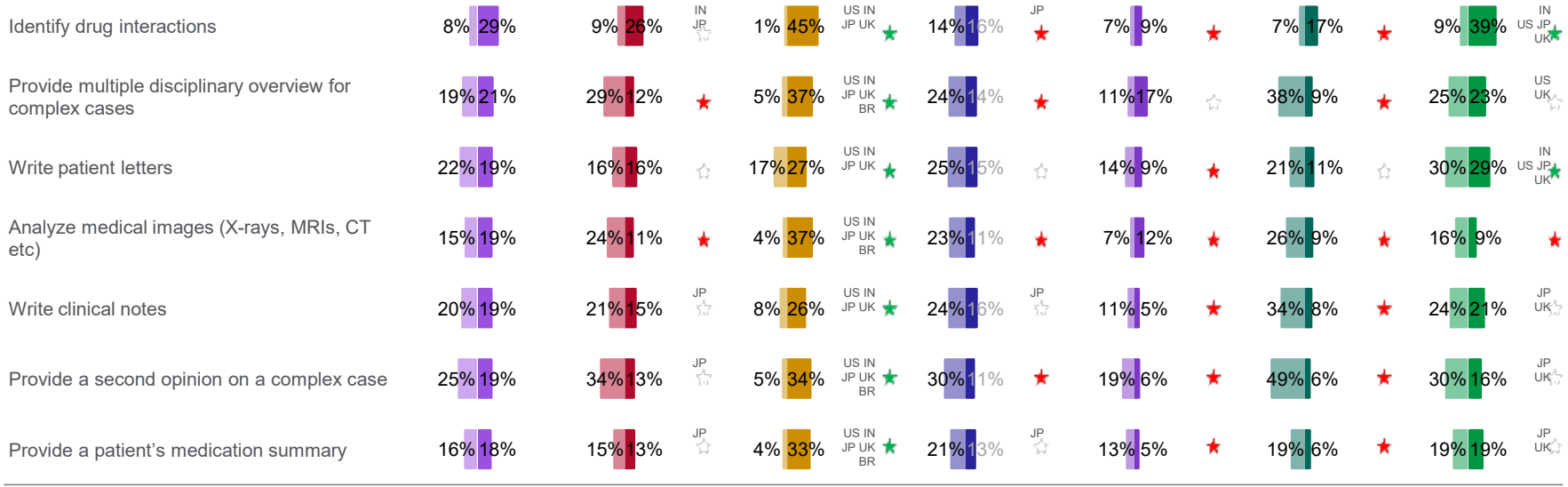
Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.

Base: n= 2024

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

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

Use of AI in your clinical setting to help with tasks



By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

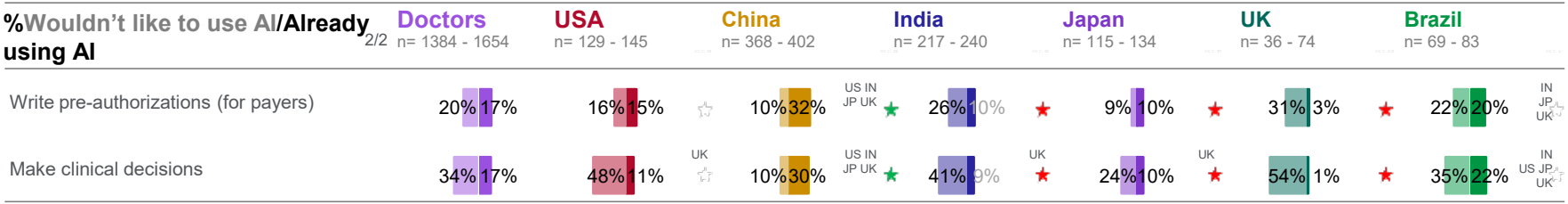
Question: Are you using an AI tool in your clinical setting to help with the following tasks? If not, would you like to? "Don't know / not applicable" answers are excluded from the responses.

Base: 1654

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

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

Use of AI in your clinical setting to help with tasks



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: 1654

Doctors current use of clinical-specific AI tools in practice

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

ELSEVIER

Back to home

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

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: n= 1654

Doctors current use of clinical-specific AI tools in practice

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

Back to home

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

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

By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: n= 1654

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

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

Use of AI in your clinical setting to help with tasks

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

Base: 370

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

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

Back to home

Use of AI in your clinical setting to help with tasks

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

Too few responses

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: 370

Nurses current use of clinical-specific AI tools in practice

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

ELSEVIER

Back to home

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

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%	15%			
Provide a second opinion on a complex case	17%	9%	37%	6%			
Identify drug interactions	14%	22%	11%	15%		Too few responses	
Provide a patient's medication summary	14%	13%	25%	12%		13%	
Provide multiple disciplinary overview for complex cases	13%	11%	29%	0%			
Write patient letters	12%	11%	7%	16%			
Write clinical notes	11%	11%	13%	14%			

US

US IN

US IN

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 370

Nurses current use of clinical-specific AI tools in practice

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

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Back to home

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

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 370

What would increase trust in AI tools

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

Back to home

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

What would increase trust in AI tools

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

Back to home

2/2	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425
Clear accountability for provided information (responsibility)	59%	61%	57%
Guidance is provided for using outputs in a clinical setting (training)	57%	59%	56%
Abides by laws governing development and implementation (legality)	57%	62% NU	52%
Delivers coherent clinical outputs in complex situations (quality model output)	56%	62% NU	50%
Eliminates bias in training data (e.g. considers gender and ethnic differences) (fairness)	56%	58%	54%
Other (please specify)	4%	3%	4%
Don't know / Not applicable	3%	3%	4%

Overall | Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

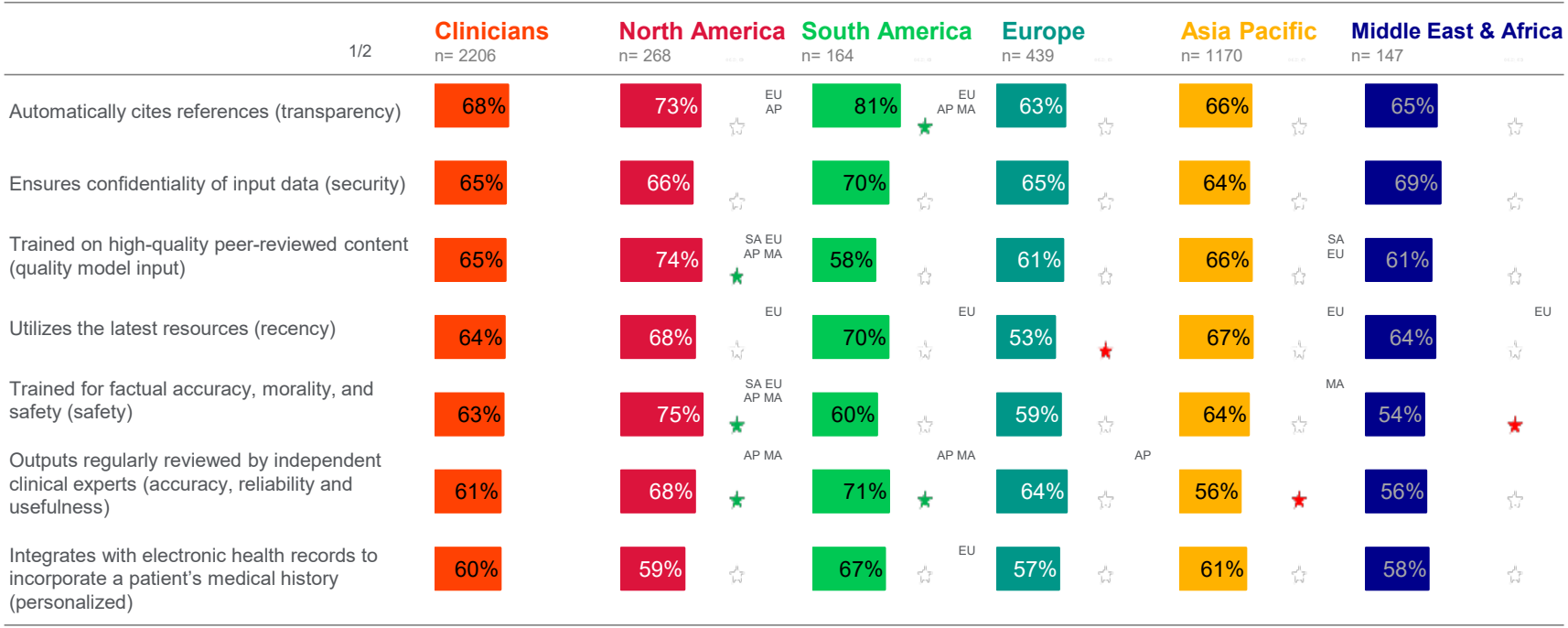
Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 2206

What would increase trust in AI tools

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

Back to home



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

What would increase trust in AI tools

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

ELSEVIER

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

What would increase trust in AI tools

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

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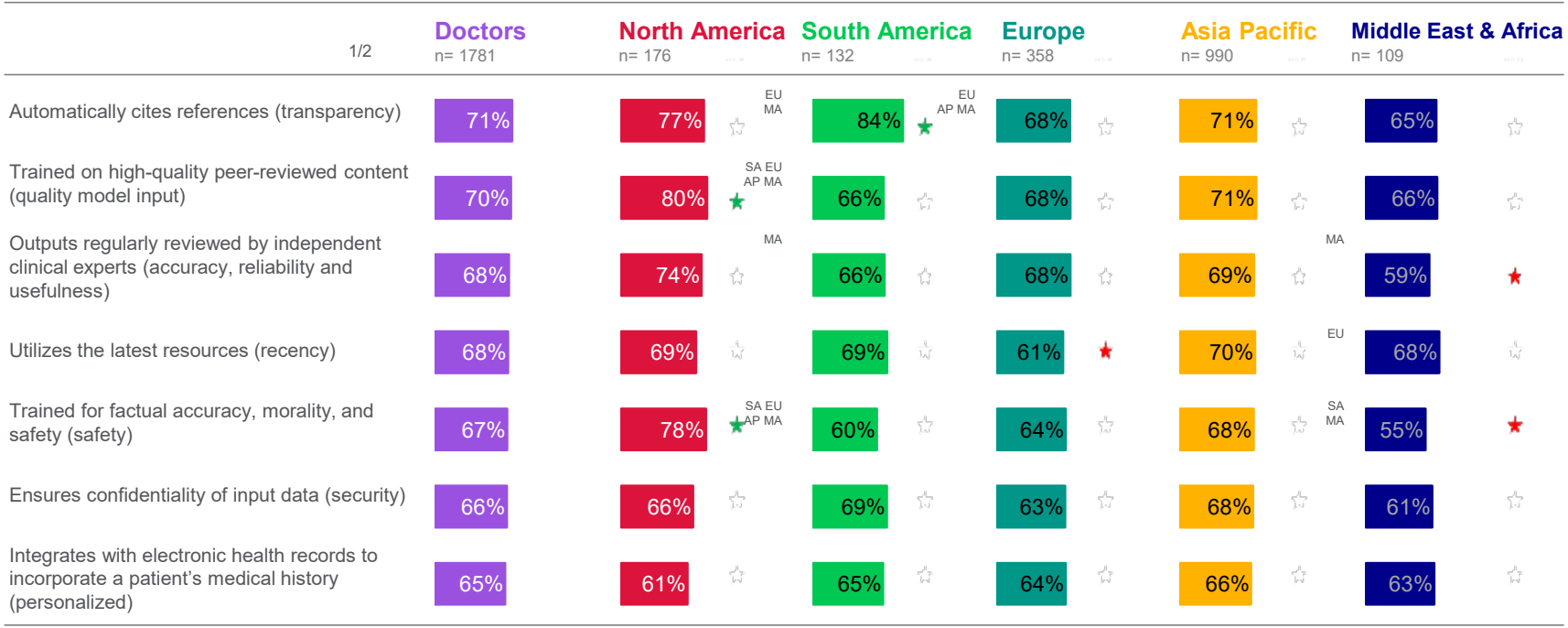
Back to home



By Region

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

What would increase trust in AI tools - doctors by region

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

ELSEVIER

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

What would increase trust in AI tools - nurses by region

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

ELSEVIER

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

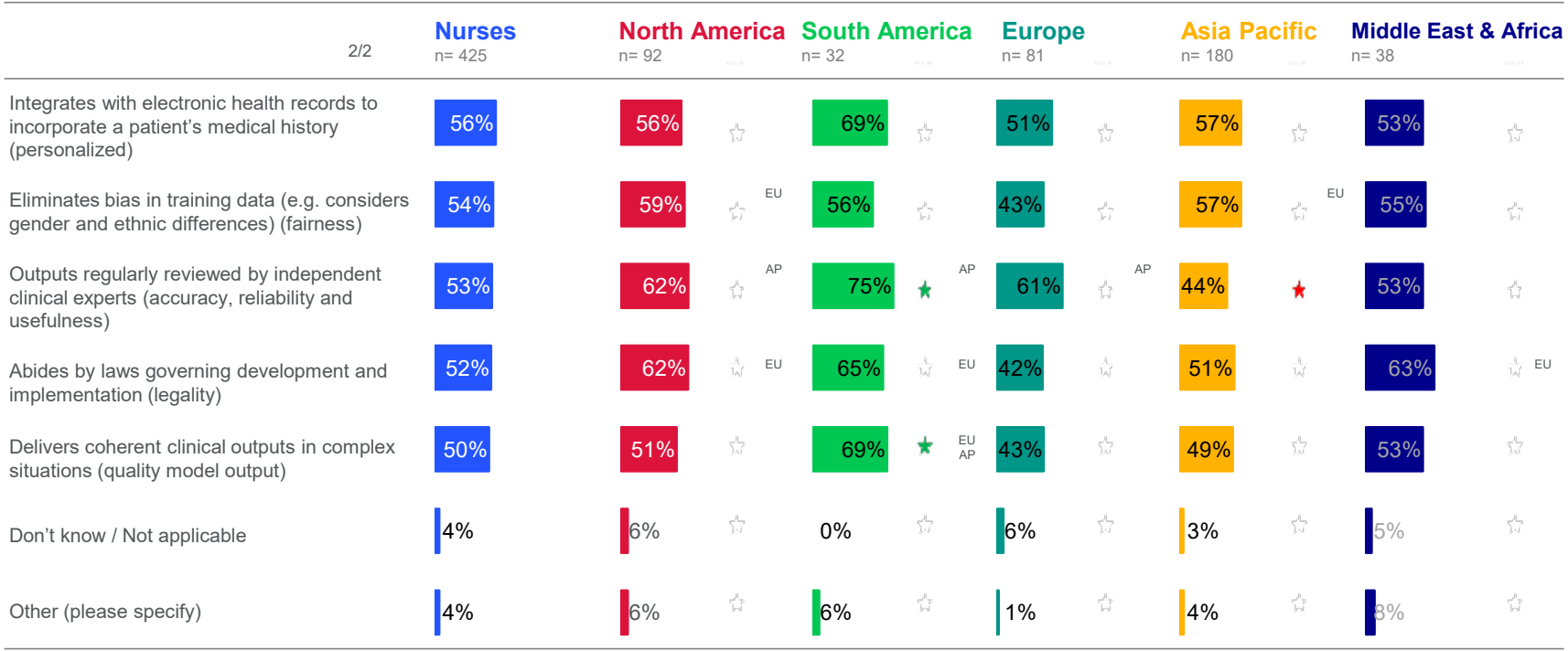
Question: Which of the following approaches would increase your trust in a clinical-specific AI tool?

Base: n= 425

What would increase trust in AI tools

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

Back to home



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 425

What would increase trust in AI tools

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

ELSEVIER

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

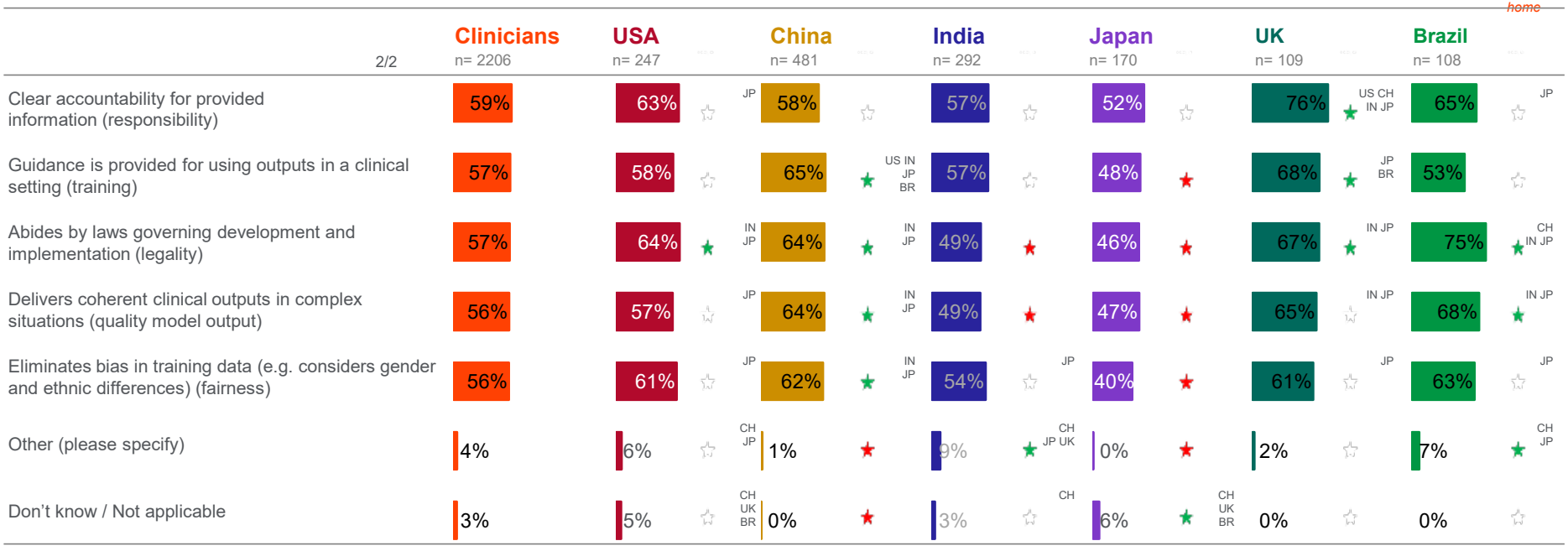
Base: n= 2206

What would increase trust in AI tools

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

ELSEVIER

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

What would increase trust in AI tools

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

ELSEVIER

Back to 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% IN JP UK	77% IN JP UK	65%	64%	64%	86% IN JP UK
Trained on high-quality peer-reviewed content (quality model input)	70%	80% IN JP BR	78% IN JP BR	66% JP	50%	76% JP	64% JP
Outputs regularly reviewed by independent clinical experts (accuracy, reliability and usefulness)	68%	74% IN JP	74% IN JP	64%	61%	76% JP	74% JP
Utilizes the latest resources (recency)	68%	68% JP	77% US IN JP	66% JP	54%	67%	69% JP
Trained for factual accuracy, morality, and safety (safety)	67%	79% IN JP BR	75% IN JP	64%	57%	85% IN JP BR	67%
Ensures confidentiality of input data (security)	66%	67% JP	74% IN JP	64%	54%	74% JP	76% IN JP
Integrates with electronic health records to incorporate a patient's medical history (personalized)	65%	63% JP	75% US IN JP	65% JP	42%	74% JP	67% JP

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

What would increase trust in AI tools

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

ELSEVIER

Back to home

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

What would increase trust in AI tools

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

ELSEVIER

Back to home

1/2

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

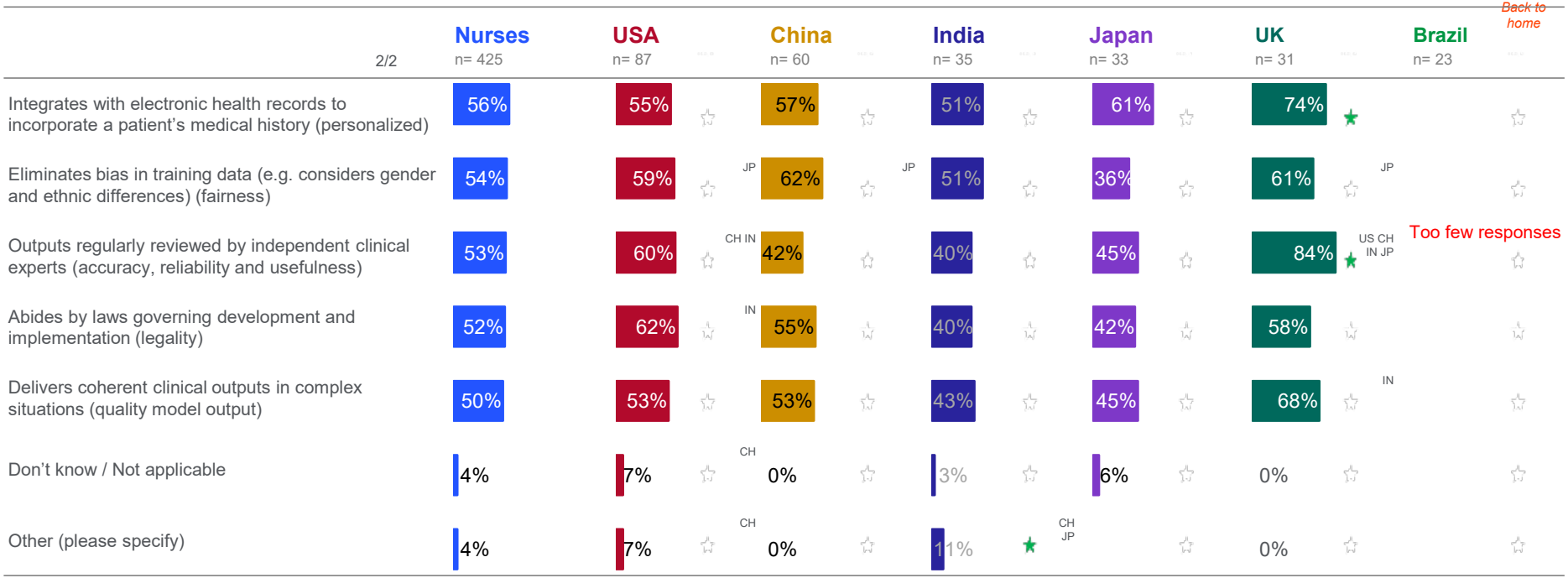
Base: n= 425

What would increase trust in AI tools

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

ELSEVIER

Back to home



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

How healthcare will change in the next 2-3 years

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

Back to home

%Disagree/Agree 1/2	Clinicians n= 2091 - 2120	Doctors n= 1687 - 1710	Nurses n= 402 - 412
AI will analyze all medical images to identify abnormalities	23% 56%	24% 59%	22% 54%
Healthcare costs are higher (in real terms)	30% 53%	21% 59% NU	38% 47% NU
Hospital stays are shorter	24% 51%	21% 51%	28% 51%
Everyone will be able to easily access healthcare (universal healthcare)	30% 51%	35% 43%	26% 59%
Healthcare will be more equitable	26% 50%	30% 39%	22% 62%
Clinicians using AI tools deliver higher quality care than clinicians who do not use them	27% 41%	25% 47% NU	29% 36% NU
Hospitalization rates are lower	37% 41%	41% 32%	33% 50%

Overall | Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

How healthcare will change in the next 2-3 years

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

Back to home

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

Overall

Clinicians | Doctors | Nurses

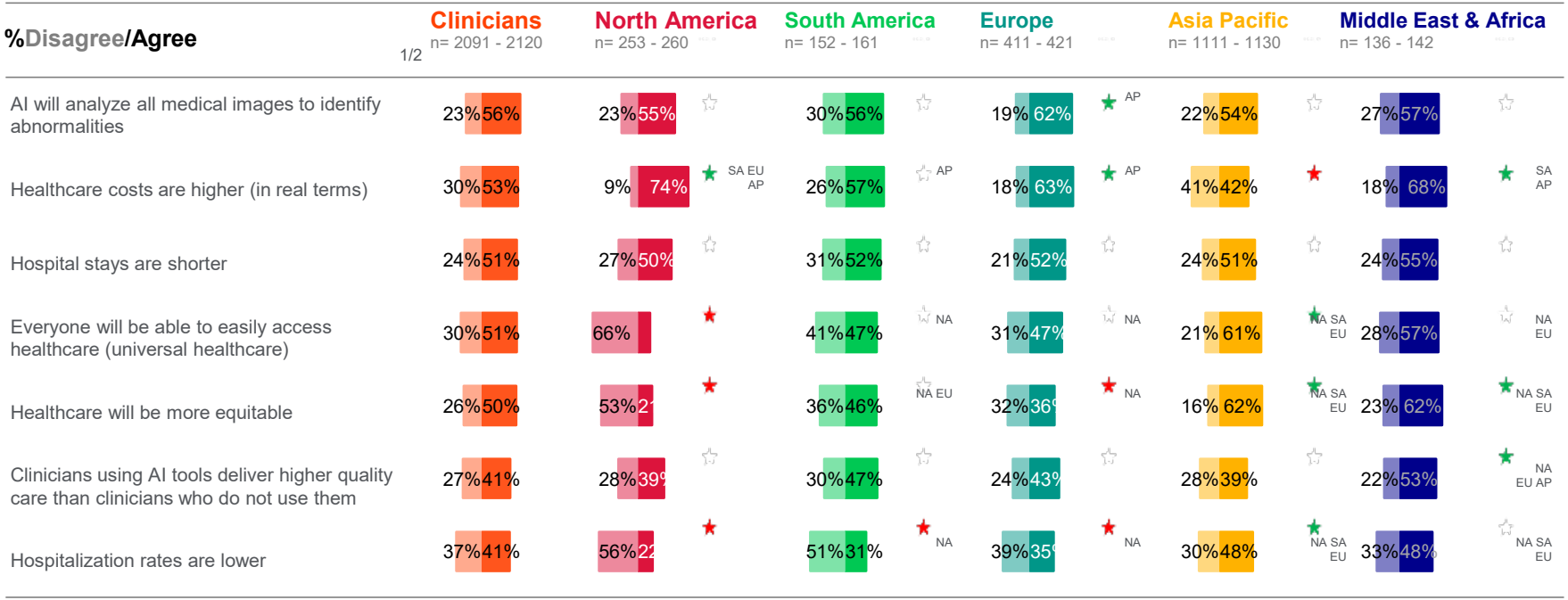
Significantly higher/ lower than all clinicians ★★

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

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

How healthcare will change in the next 2-3 years

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

How healthcare will change in the next 2-3 years

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

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

By Region

Clinicians | Doctors | Nurses

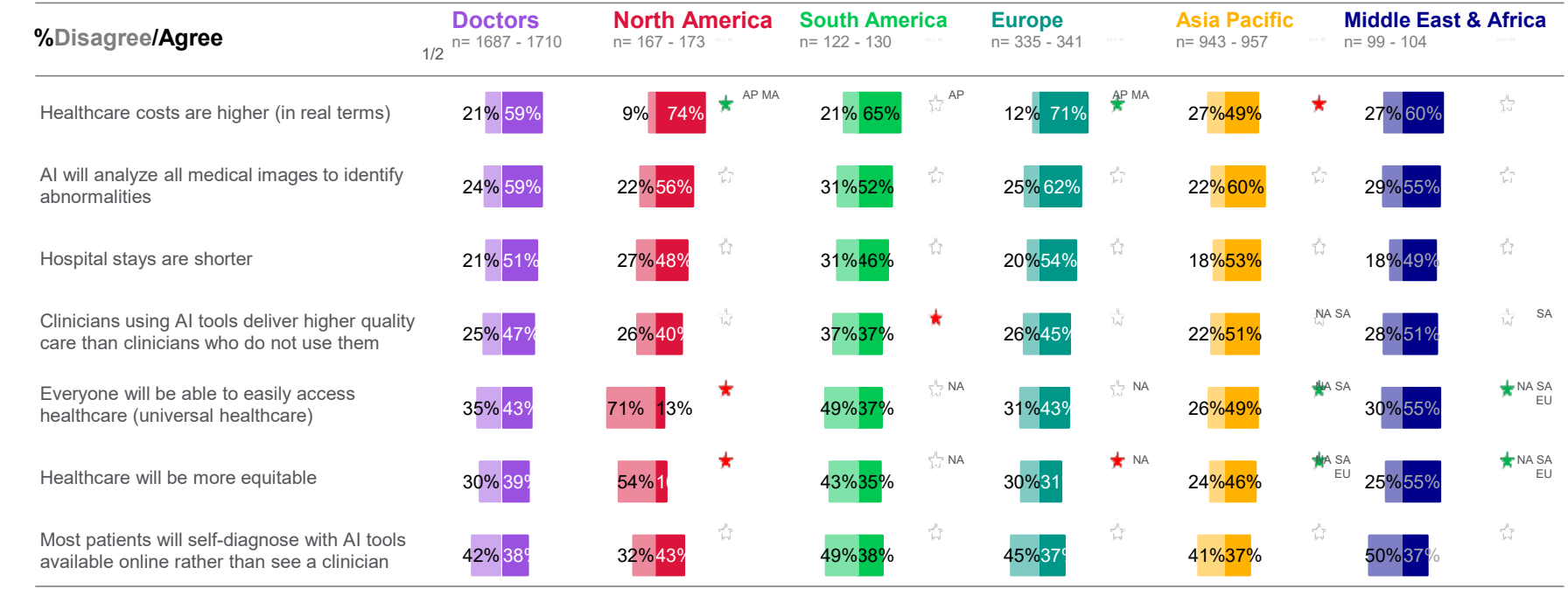
Significantly higher/ lower than all clinicians ★★

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

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

How healthcare will change in the next 2-3 years

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



By Region

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

How healthcare will change in the next 2-3 years

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

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

How healthcare will change in the next 2-3 years

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

Back to home

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

By Region

Clinicians | Doctors | Nurses

★★ *Significantly higher/ lower than all nurses*

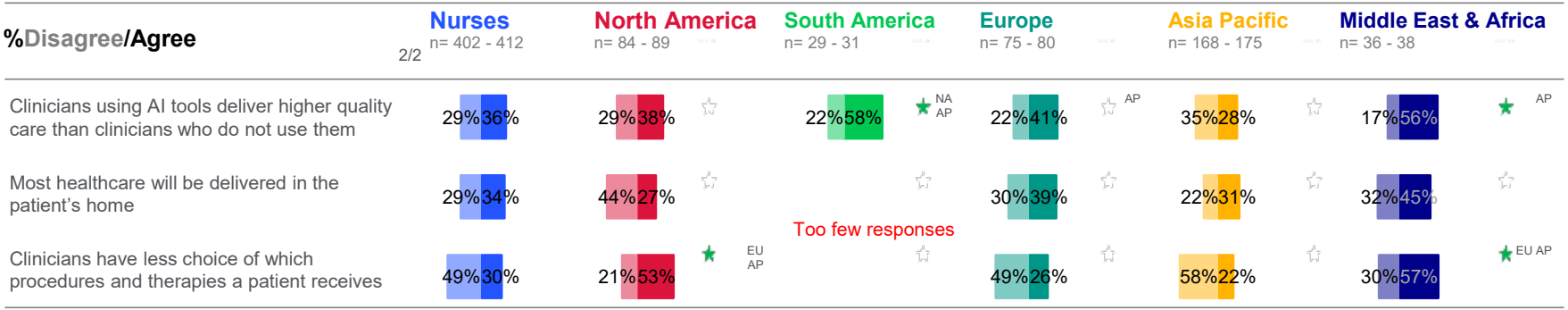
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

How healthcare will change in the next 2-3 years

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)

Back to home



By Region

Clinicians | Doctors | Nurses

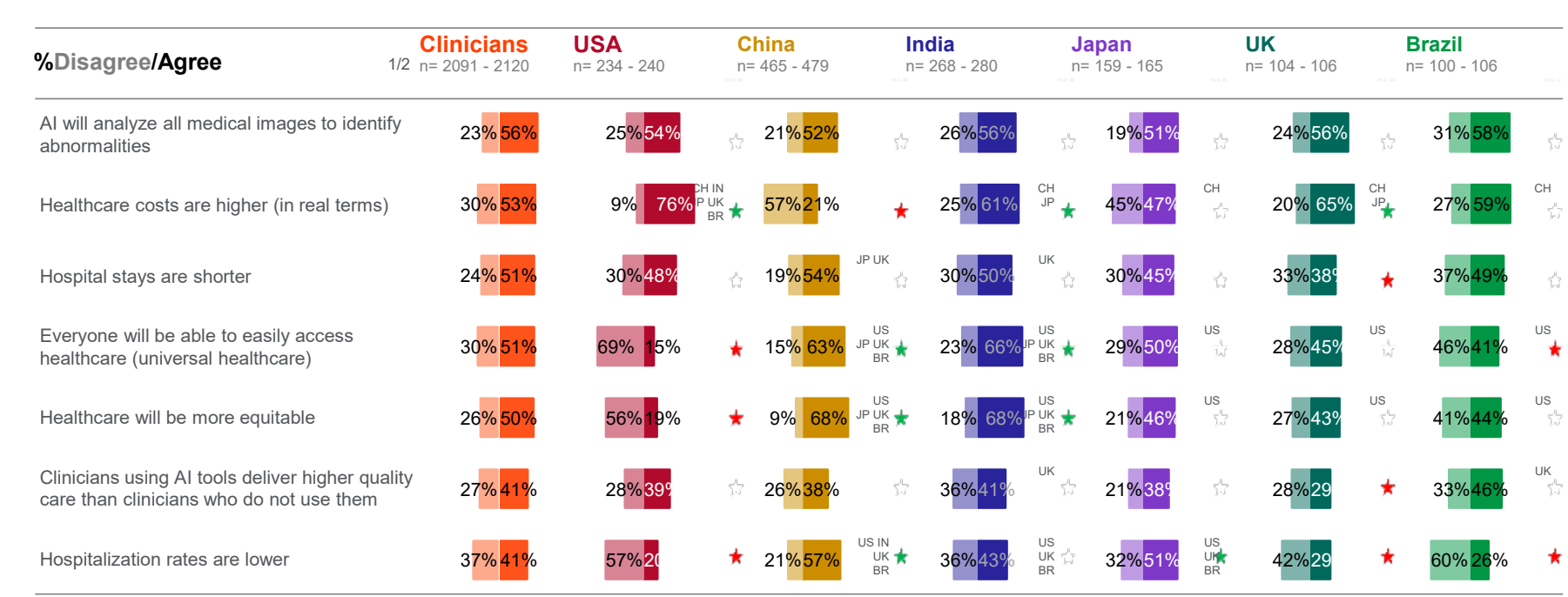
Significantly higher/ lower than all nurses

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

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

How healthcare will change in the next 2-3 years

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

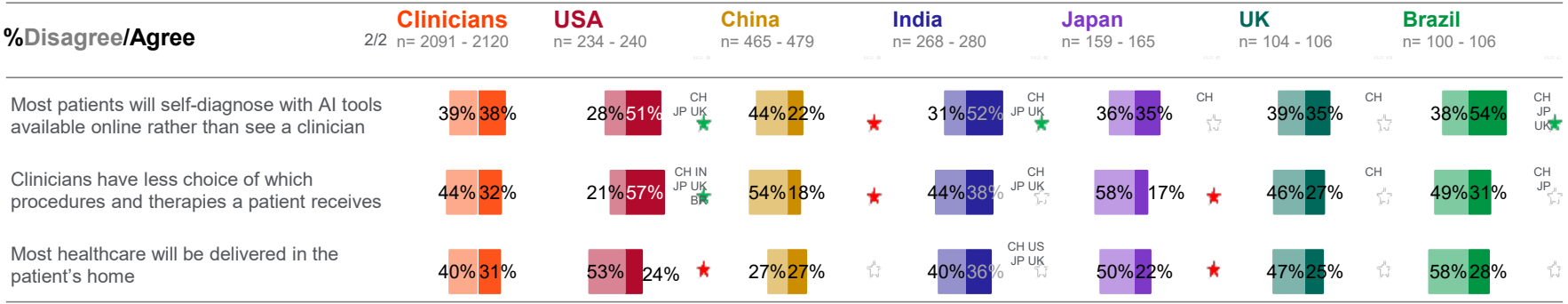
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

How healthcare will change in the next 2-3 years

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

Back to home



By Key Country

Clinicians | Doctors | Nurses

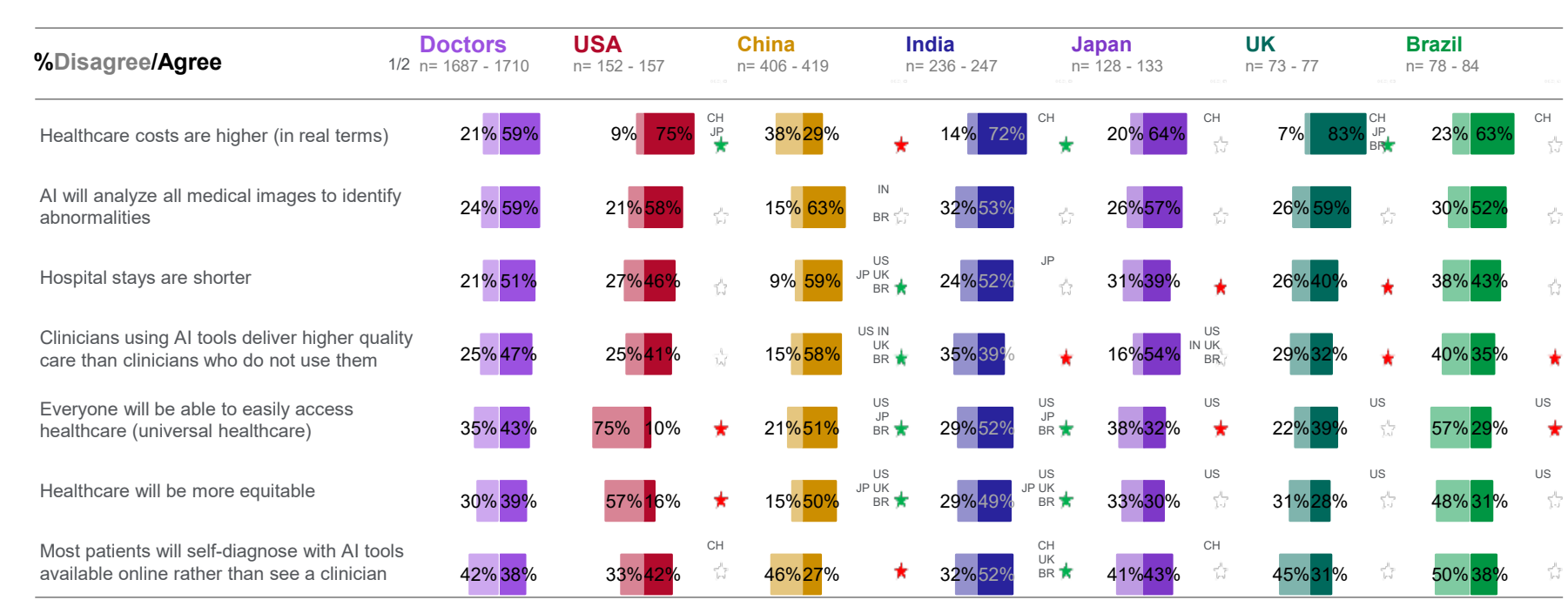
Significantly higher/ lower than all clinicians

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

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

How healthcare will change in the next 2-3 years

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



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

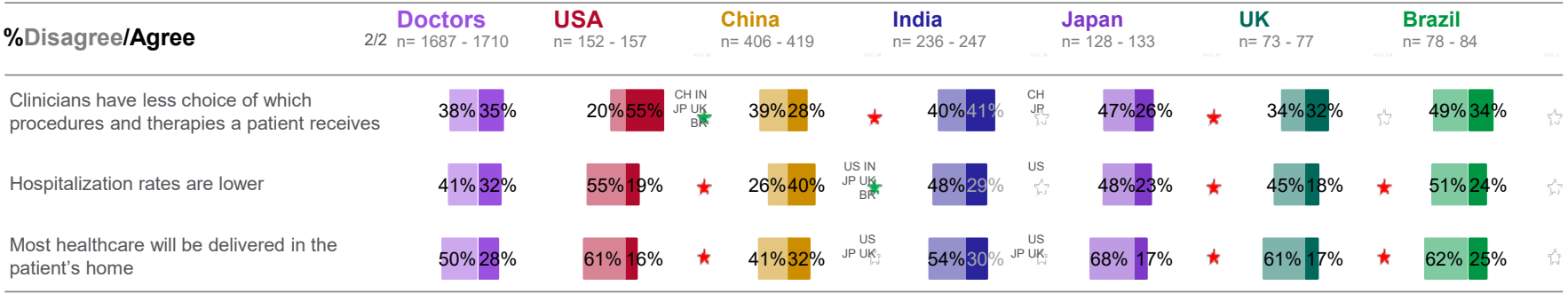
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

How healthcare will change in the next 2-3 years

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

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

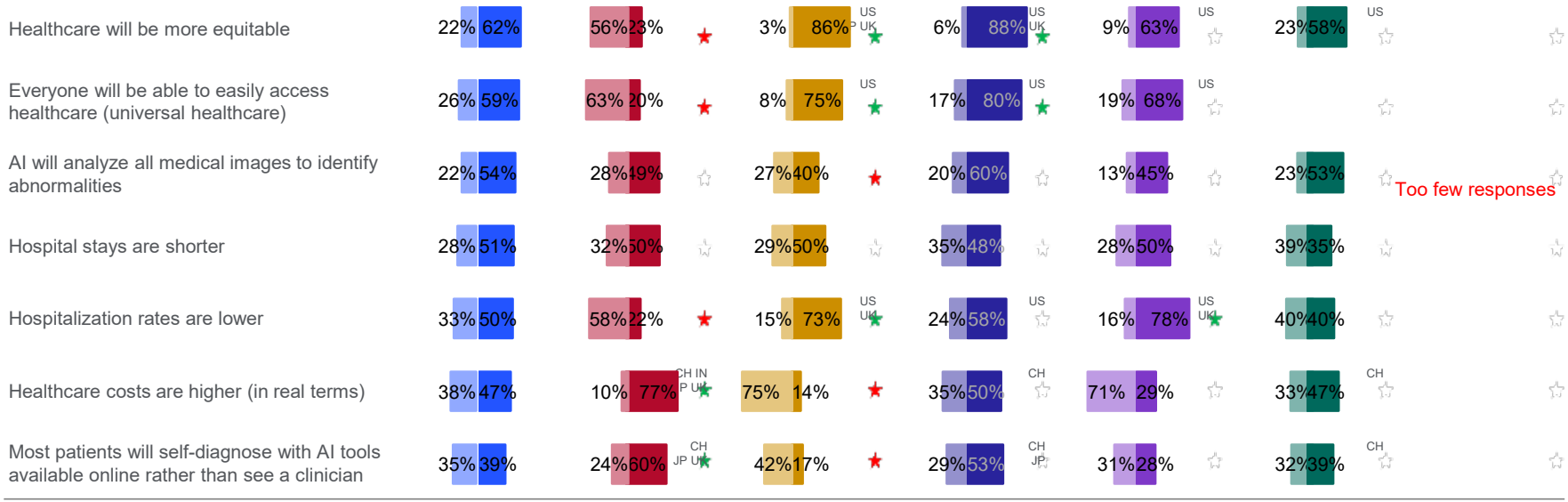
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

How healthcare will change in the next 2-3 years

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

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

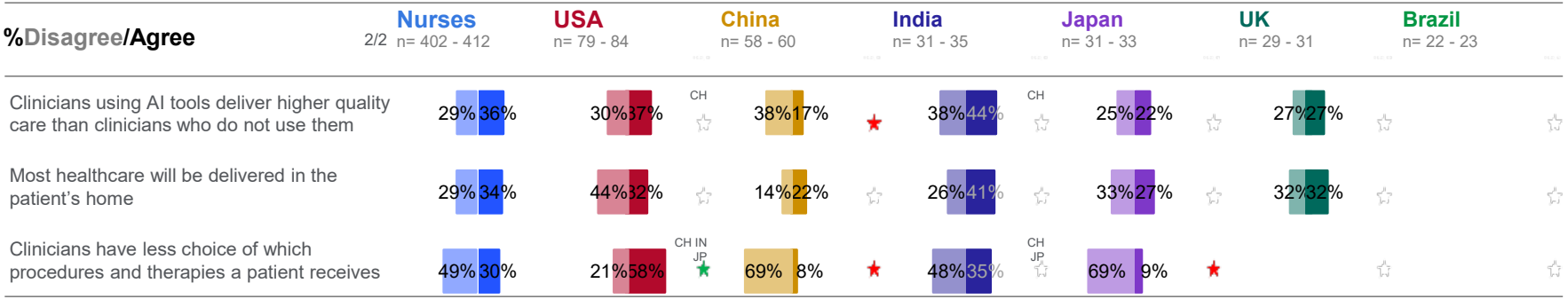
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

How healthcare will change in the next 2-3 years

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

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

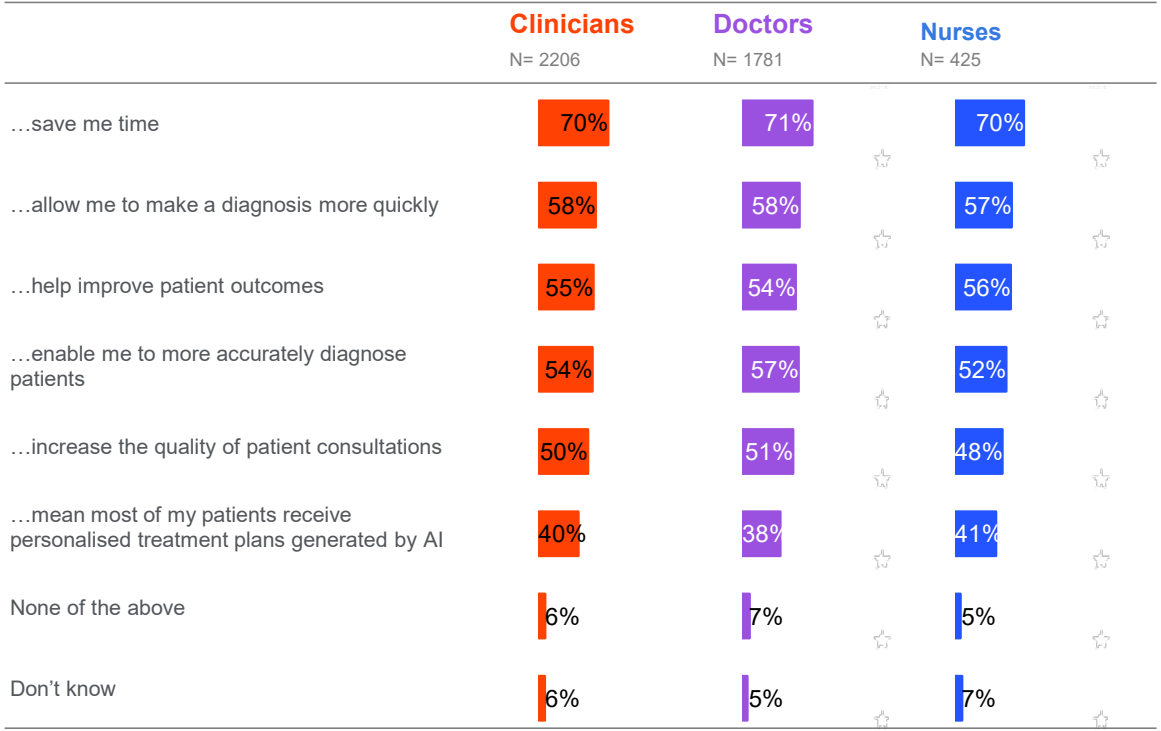
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

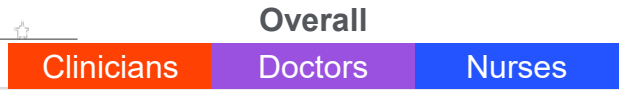
Question: For each of the following statements, to what extent do you agree or disagree? Thinking about healthcare within the primary country that you are likely to work in 2-3 years' time.
"Don't know / prefer not to say" answers are excluded from the responses.
Base: 412

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

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

I believe clinical AI tools will…





Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

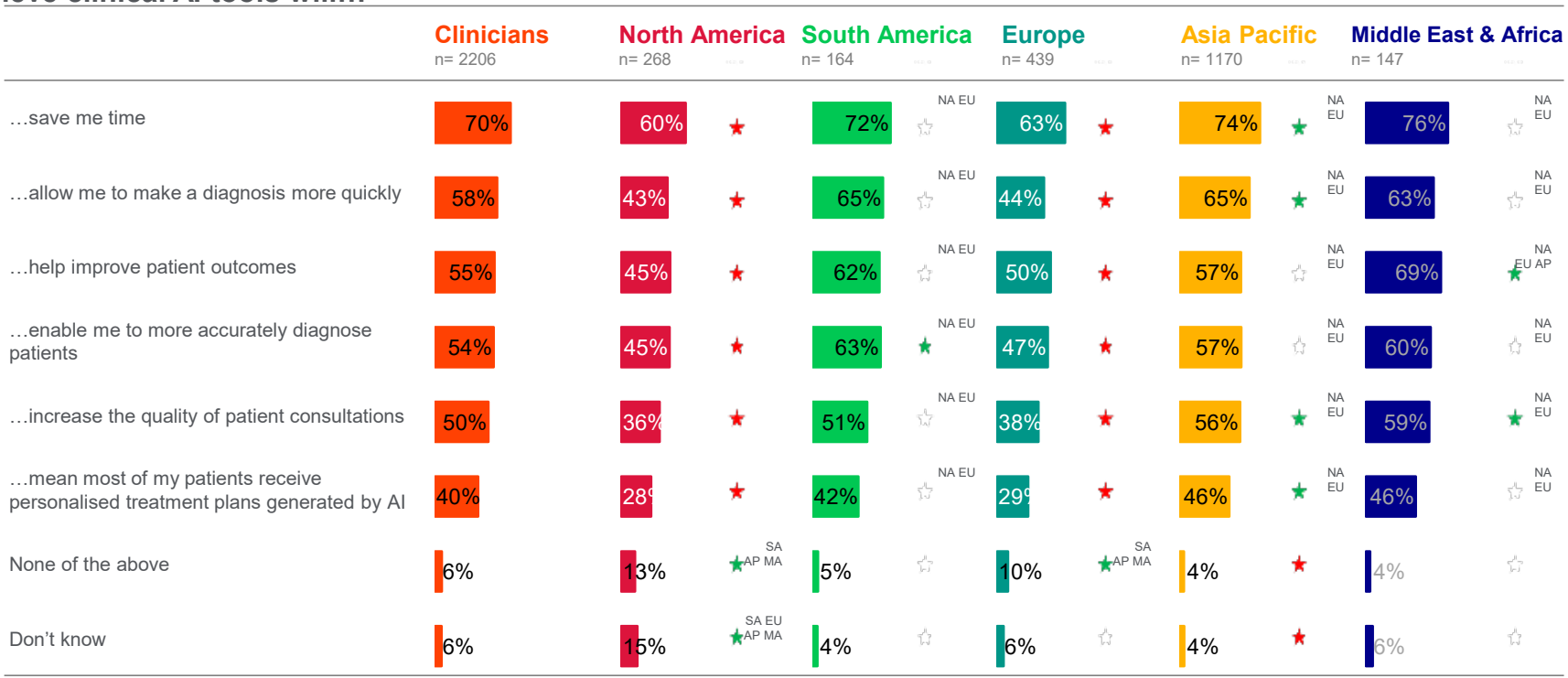
What will be the impact of AI tools in the next 2-3 years

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

ELSEVIER

Back to home

I believe clinical AI tools will…



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

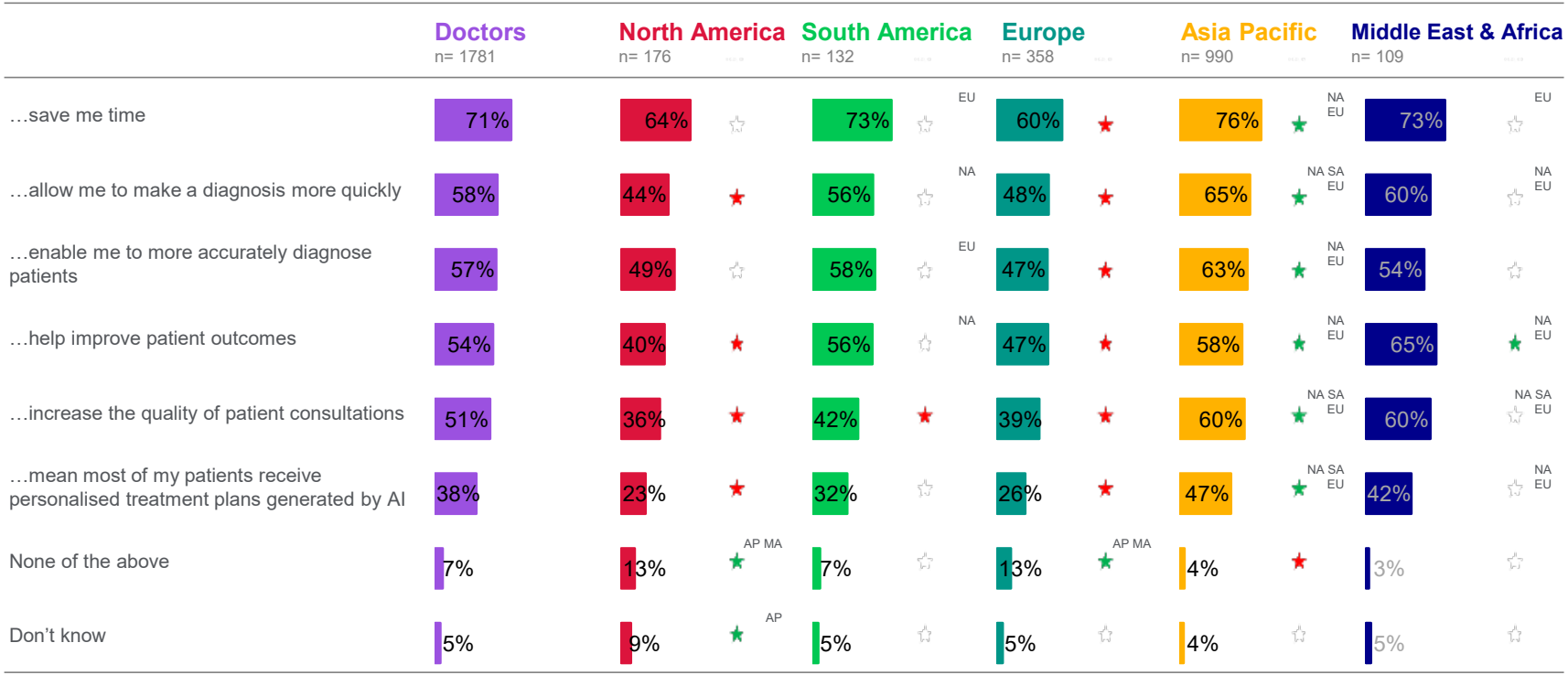
Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 2206

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

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

I believe clinical AI tools will…



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

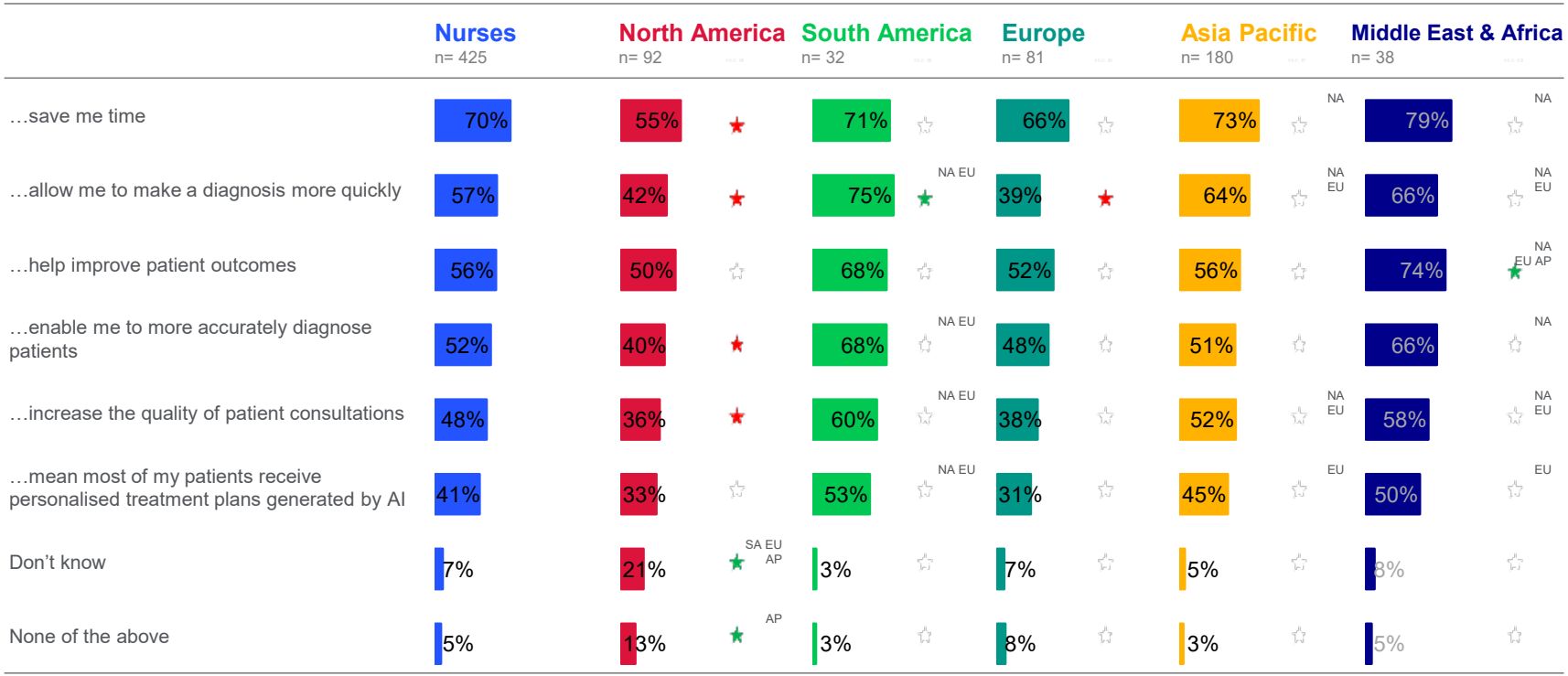
Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 1781

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

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

I believe clinical AI tools will…



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

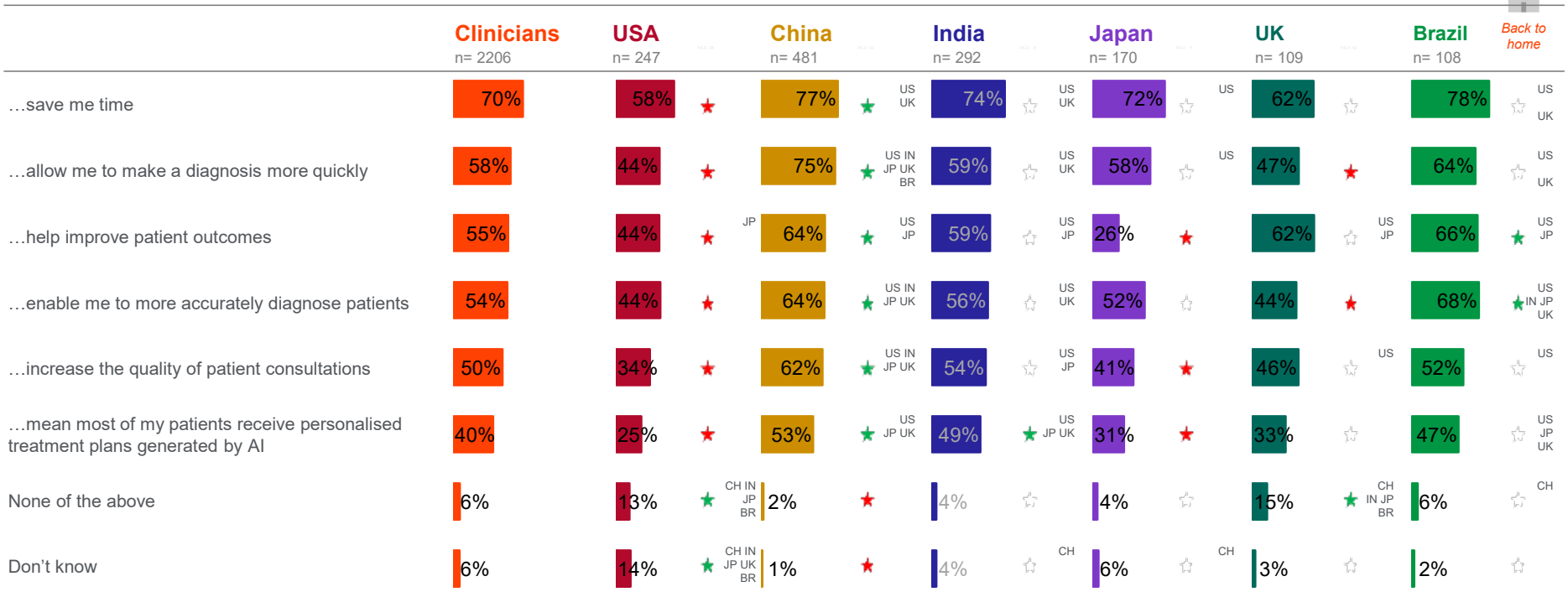
Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 425

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

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

I believe clinical AI tools will…



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

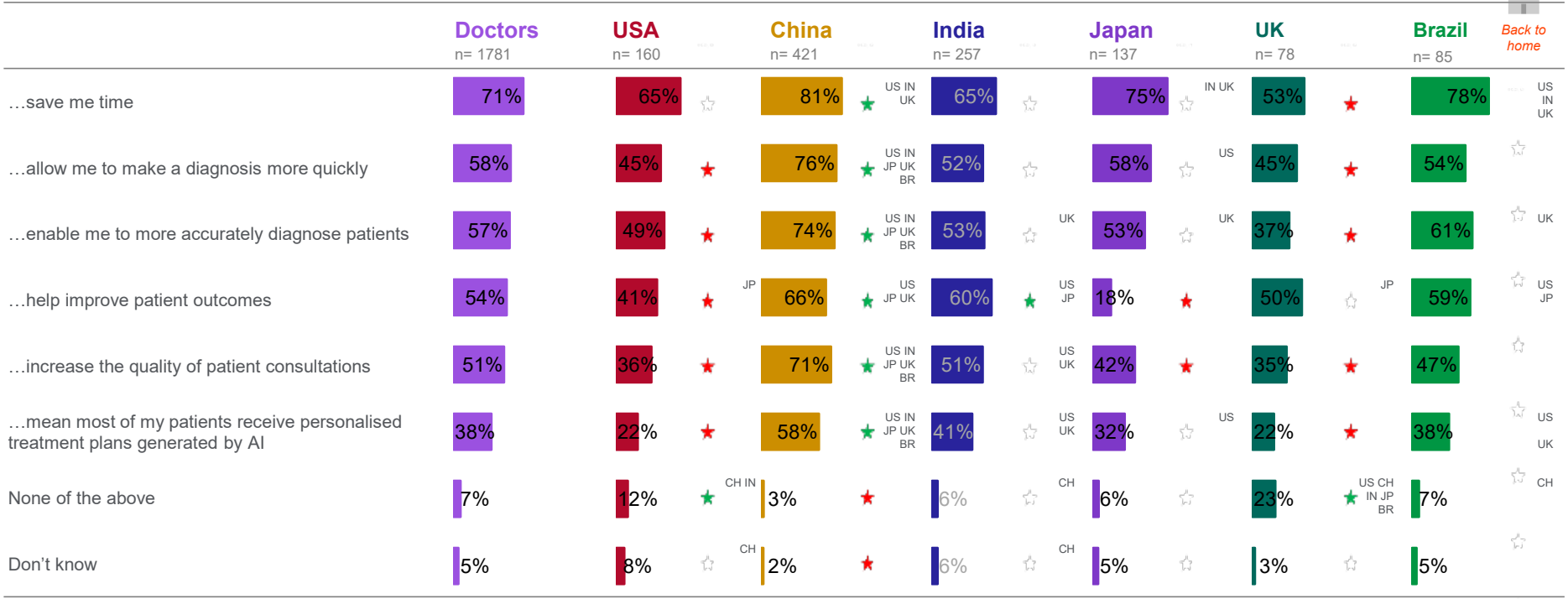
Question: Thinking specifically about clinical AI tools, what impact do you think they will have in the next 2-3 years.

Base: n= 2206

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

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

I believe clinical AI tools will…



By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

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

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

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Back to home

I believe clinical AI tools will…

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

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

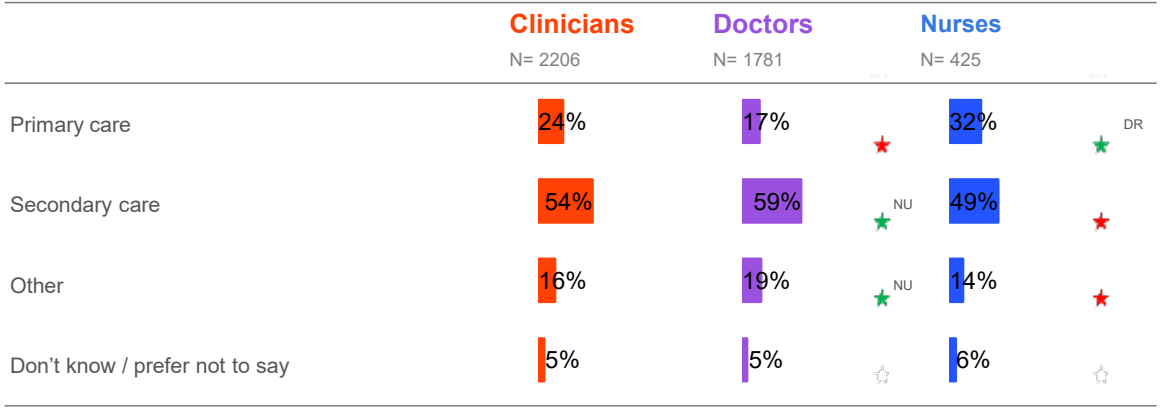
Base: n= 425

Demographics

(after weighting)

Demographics – care setting

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



Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

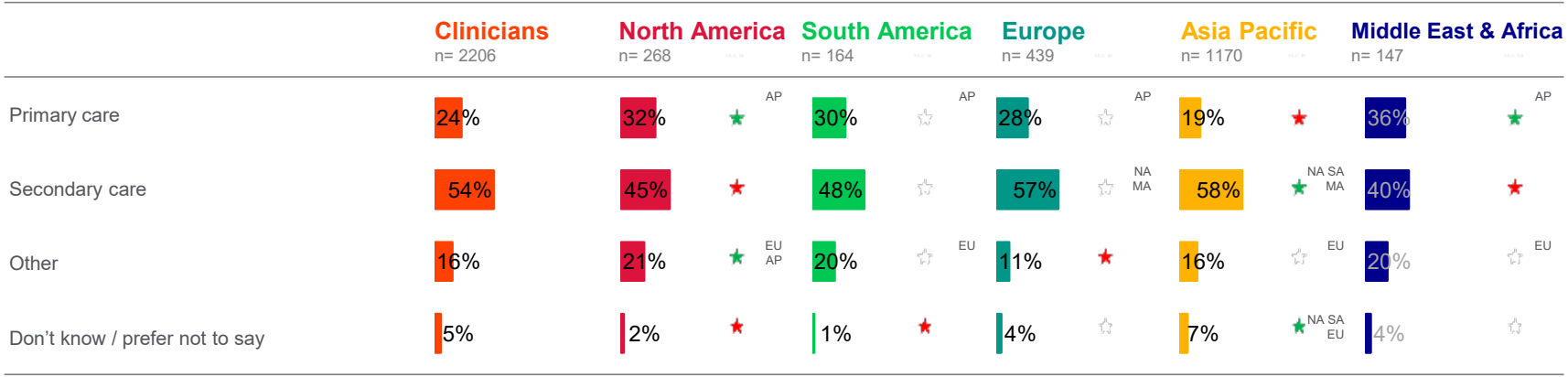
Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?

Base: n= 2206

Back to home

Demographics – care setting

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

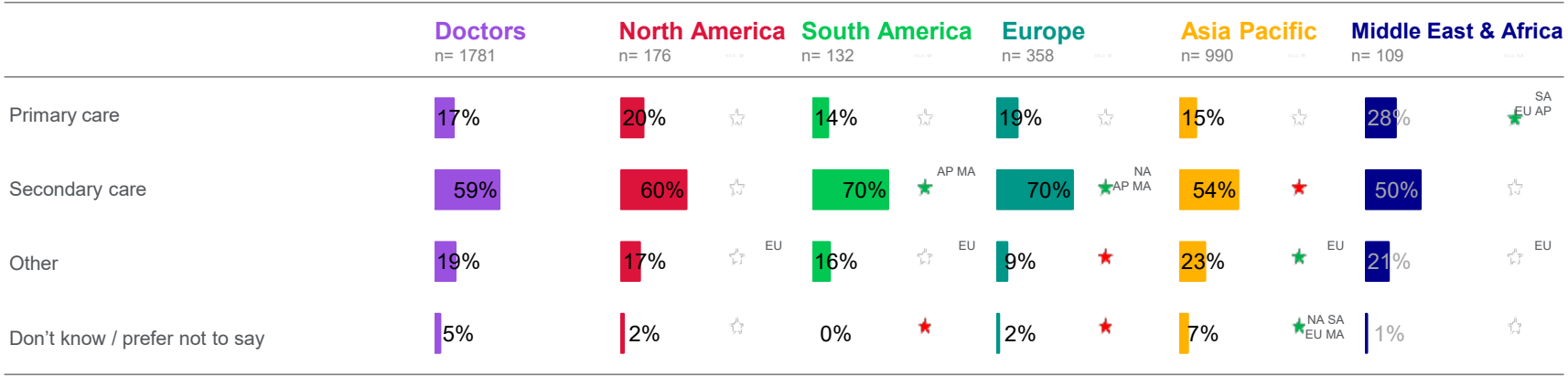
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 2206

Demographics – care setting

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



Back to home

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

Demographics – care setting

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

Back to home

	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Primary care	32%	42% AP	47% AP	38% AP	23%	45% AP
Secondary care	49%	30%	25%	44%	62% NA SA EU MA	29%
Other	14%	25% EU AP	25% AP	13%	9%	18%
Don't know / prefer not to say	6%	3%	3%	6%	7%	8%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

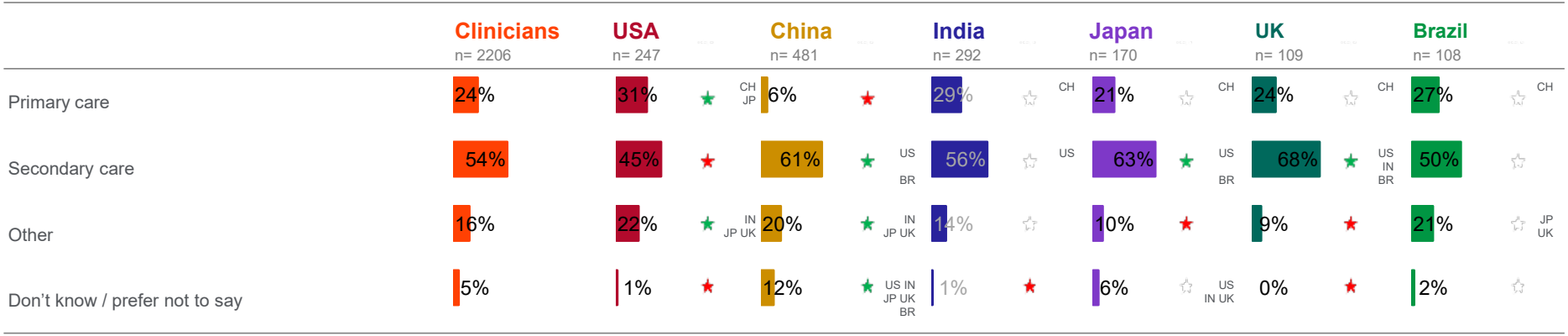
Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?

Base: n= 425

Demographics – care setting

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

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

Demographics – care setting

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

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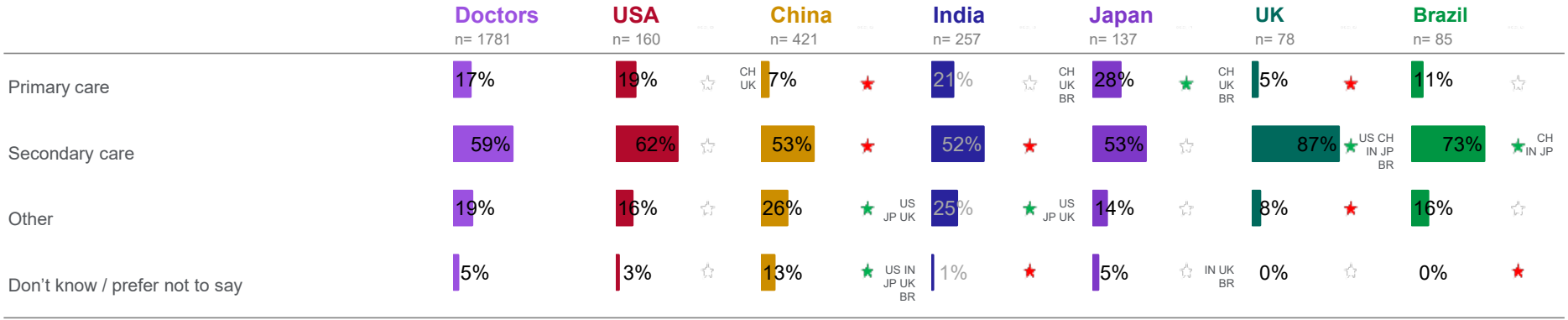


By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors ★★

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

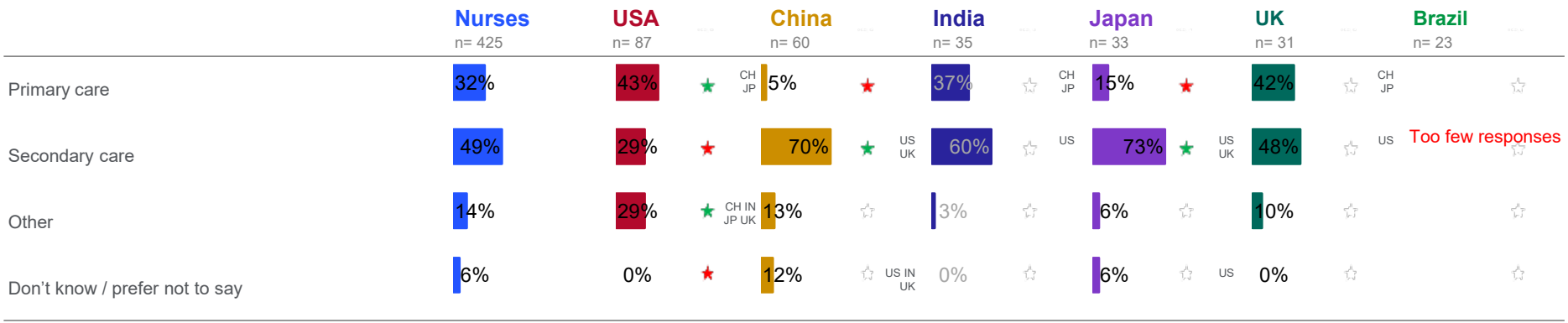
Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?

Base: n= 1781

Demographics – care setting

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

Back to home



By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

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

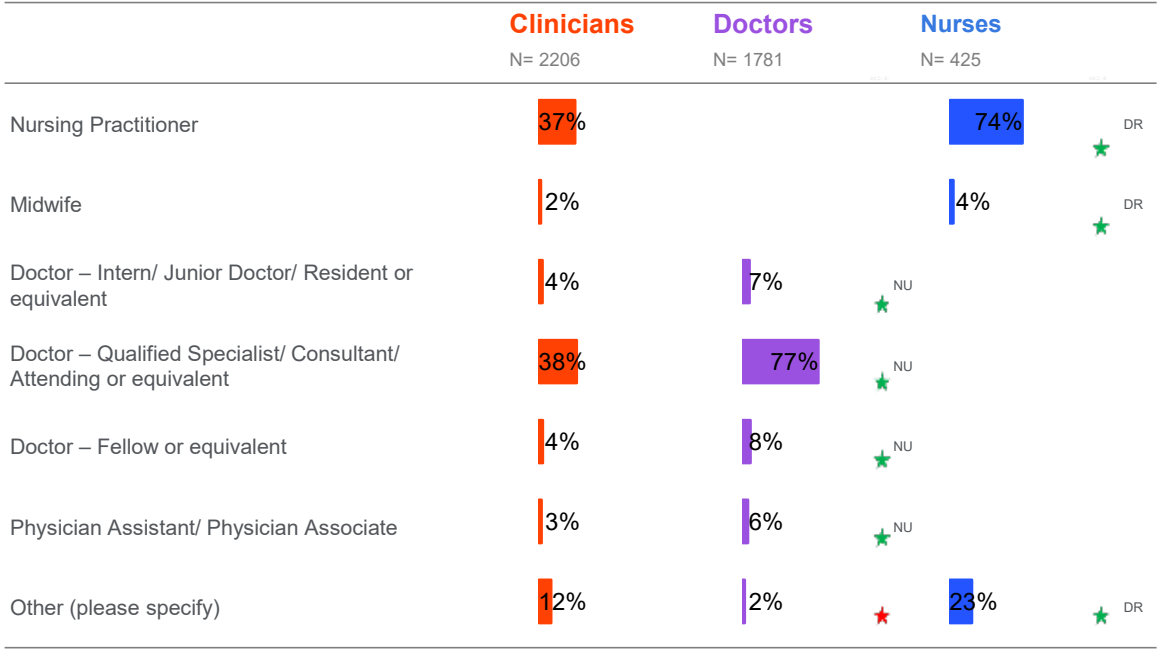
Question: Which of the following best describes the level of medical care you currently provide as a clinician within the primary country that you work in?

Base: n= 425

Demographics – position

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

Back to home



Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

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%)

Back to home

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

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

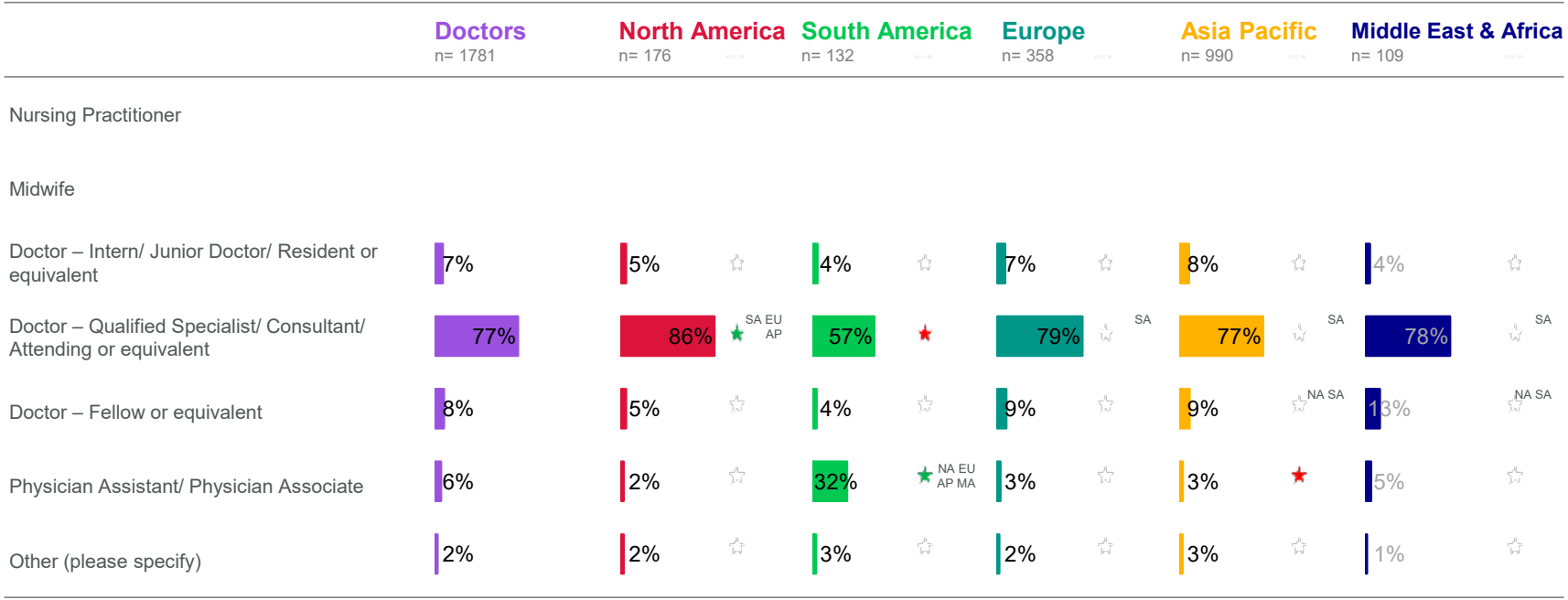
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 2206

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

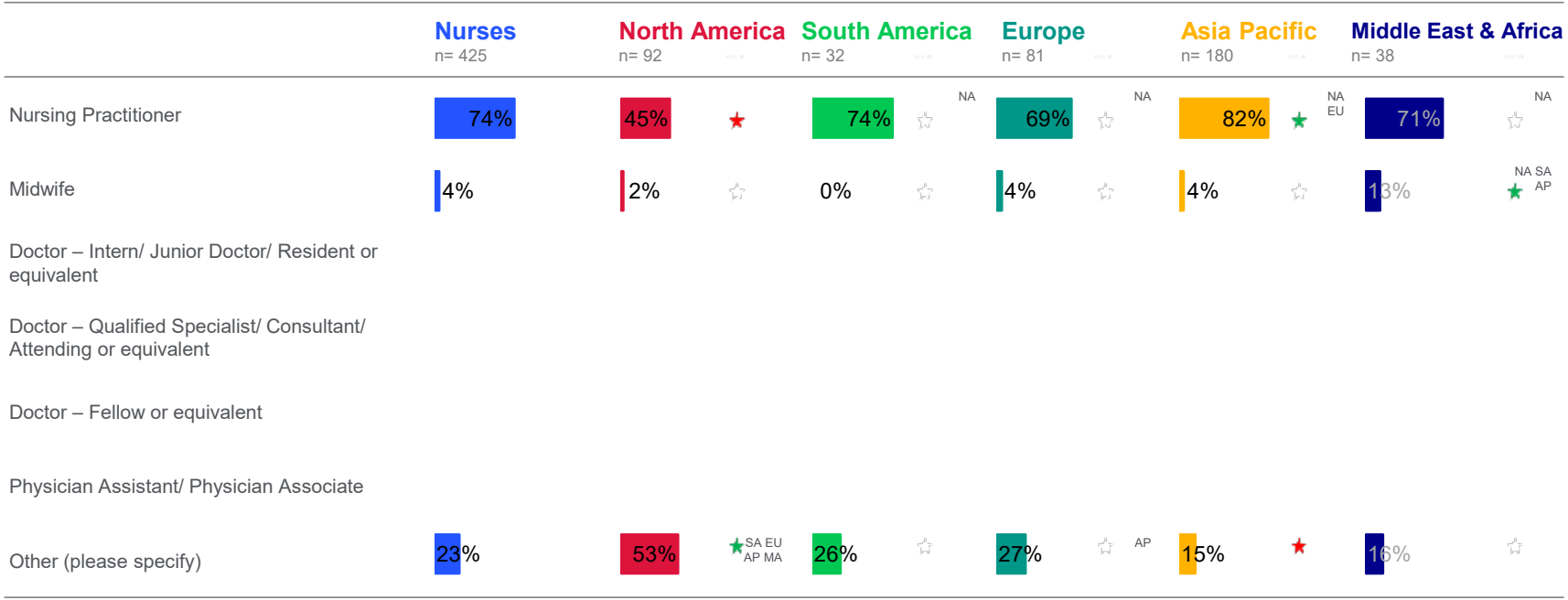
Question: Which of the following best describes your current primary clinical position?

Base: n= 1781

Demographics – position

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

Back to home



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

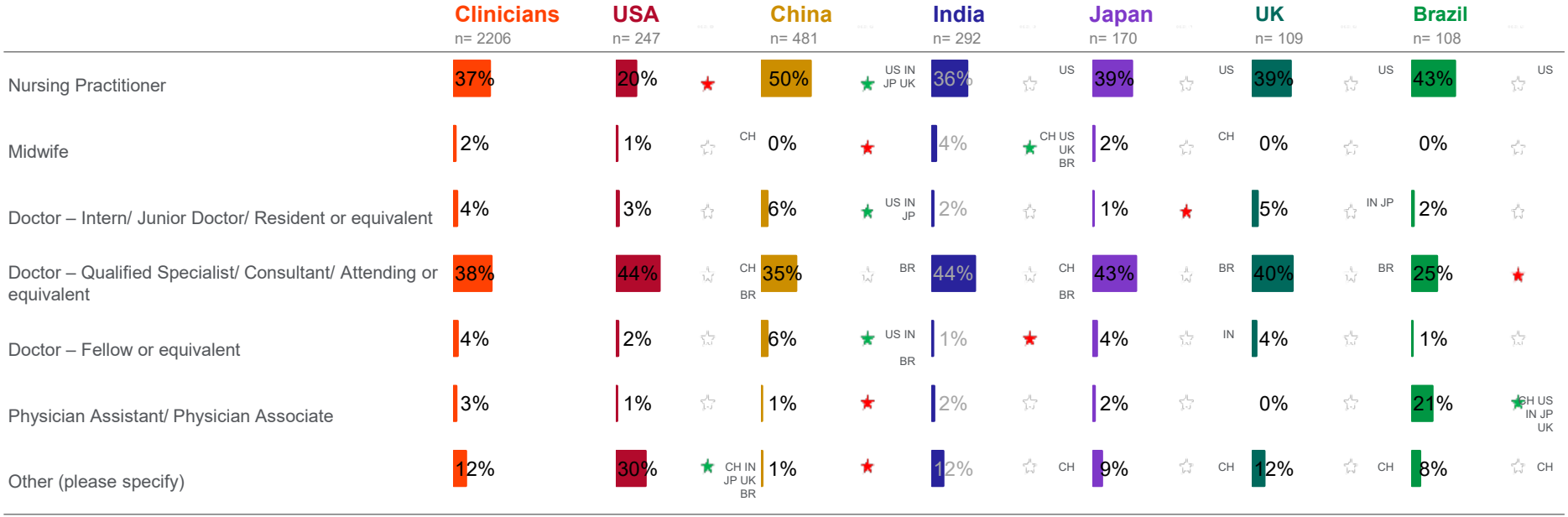
Question: Which of the following best describes your current primary clinical position?

Base: n= 425

Demographics – position

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

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

Demographics – position

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

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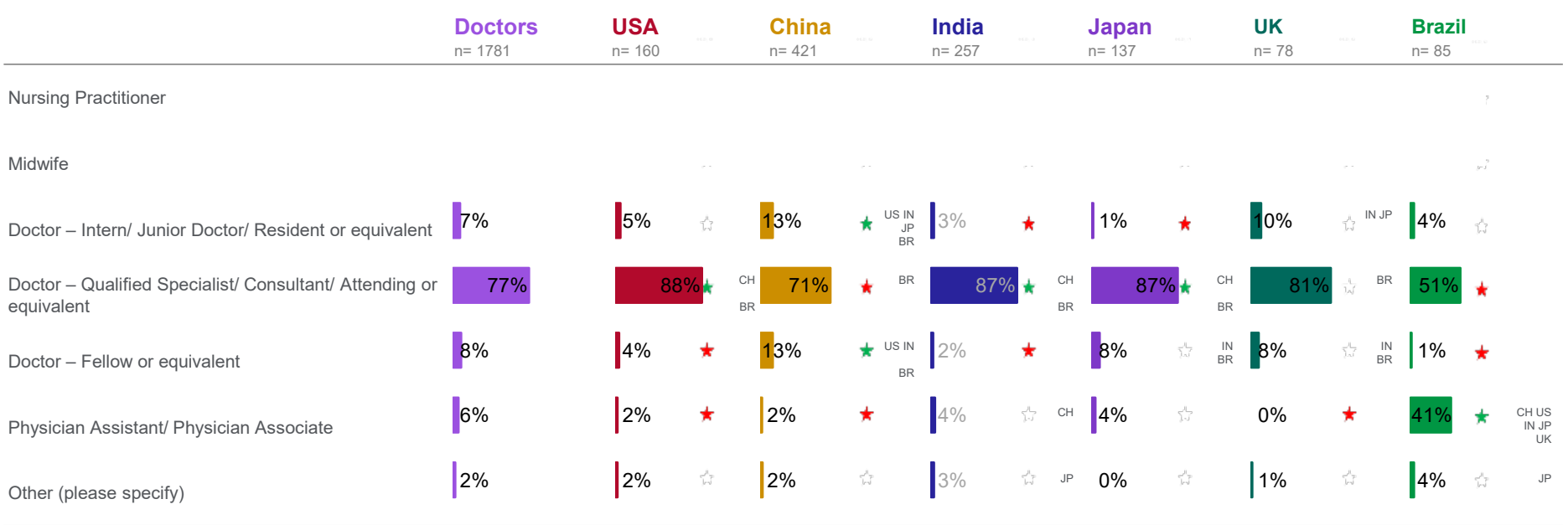

By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

Demographics – position

All the results for nurses in China reflect Nursing Practitioners

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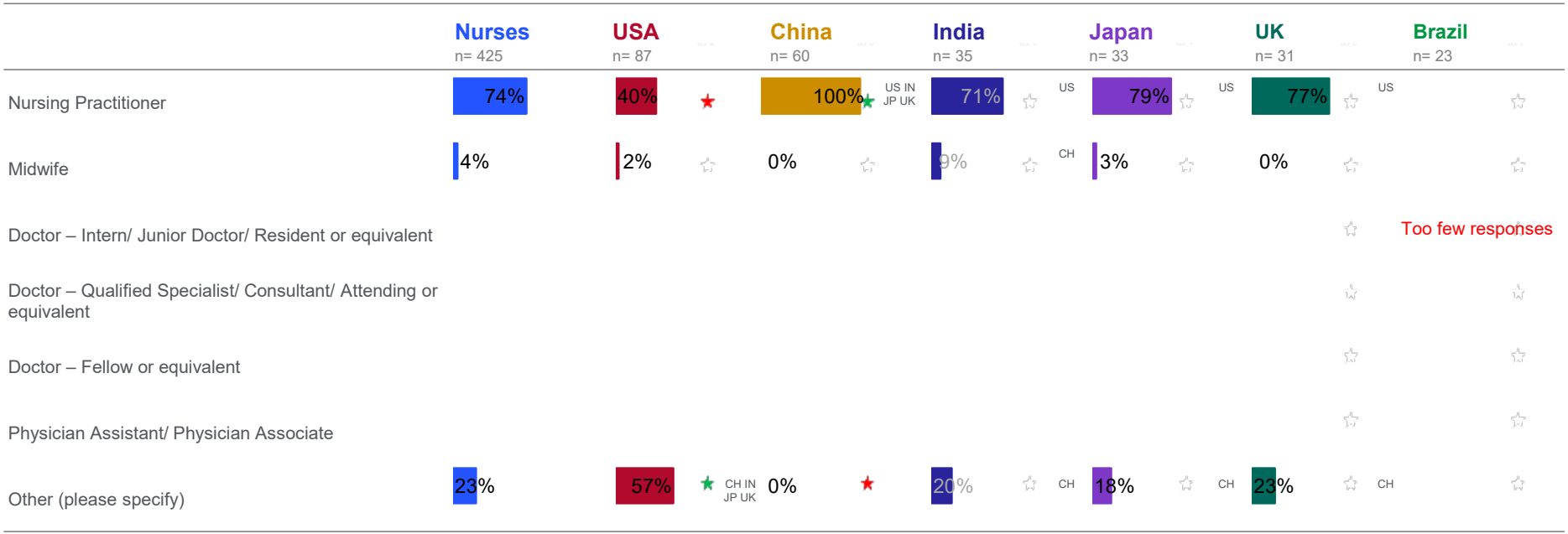
Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 425

Demographics – experience

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

Back to home

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

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

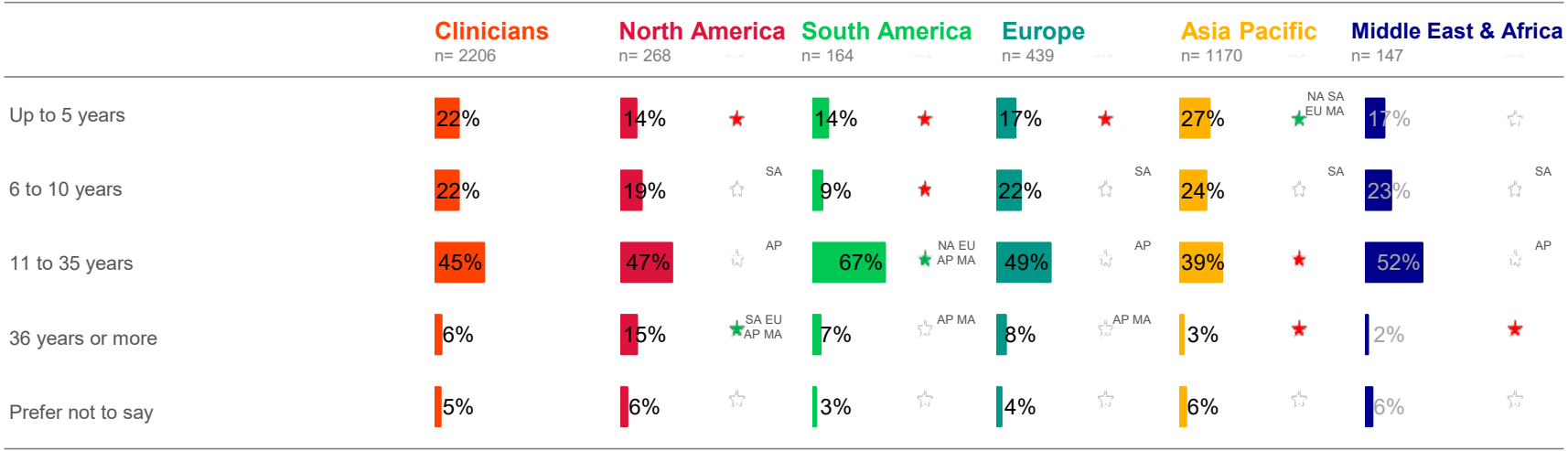
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

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

Base: n= 2206

Demographics – experience

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



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

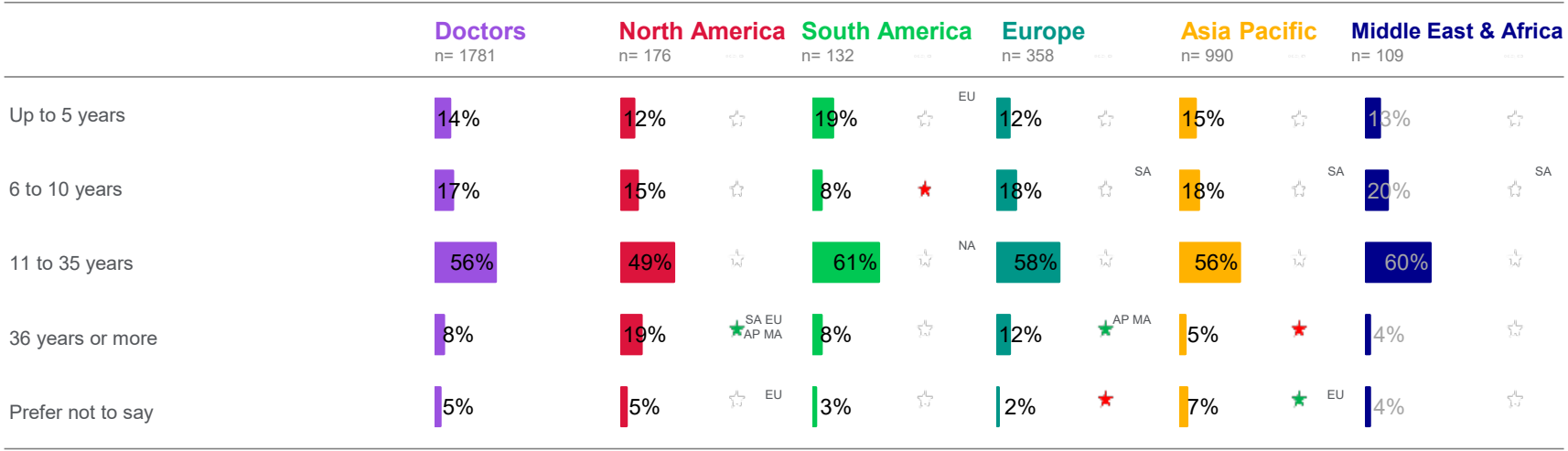
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

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

Base: n= 2206

Demographics – experience

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



Back to home

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

Demographics – experience

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

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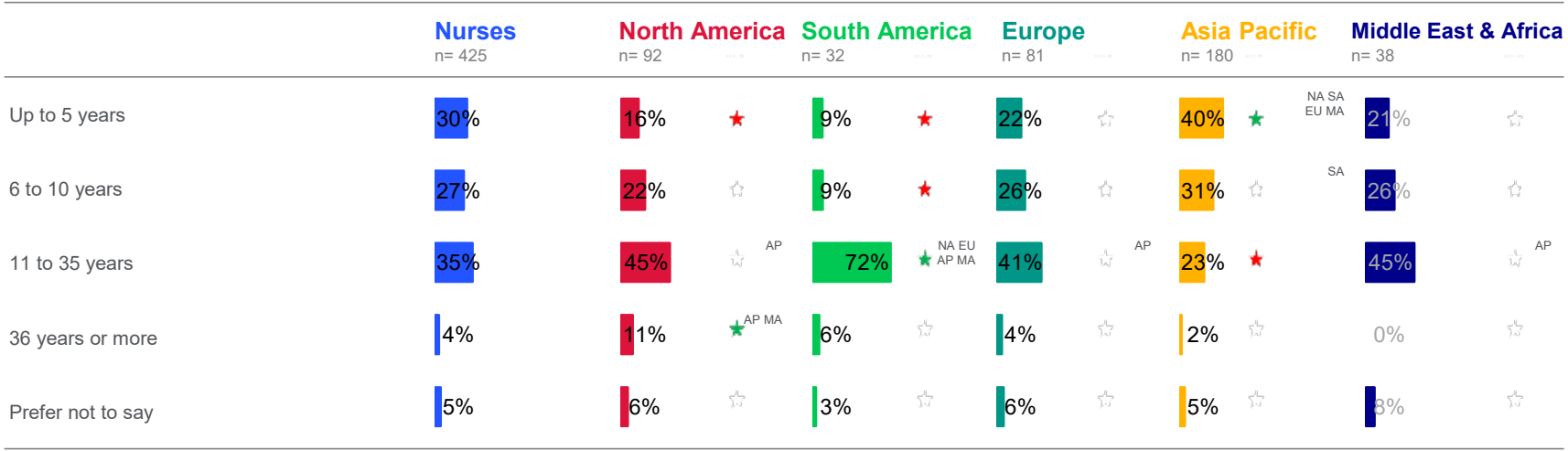


By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

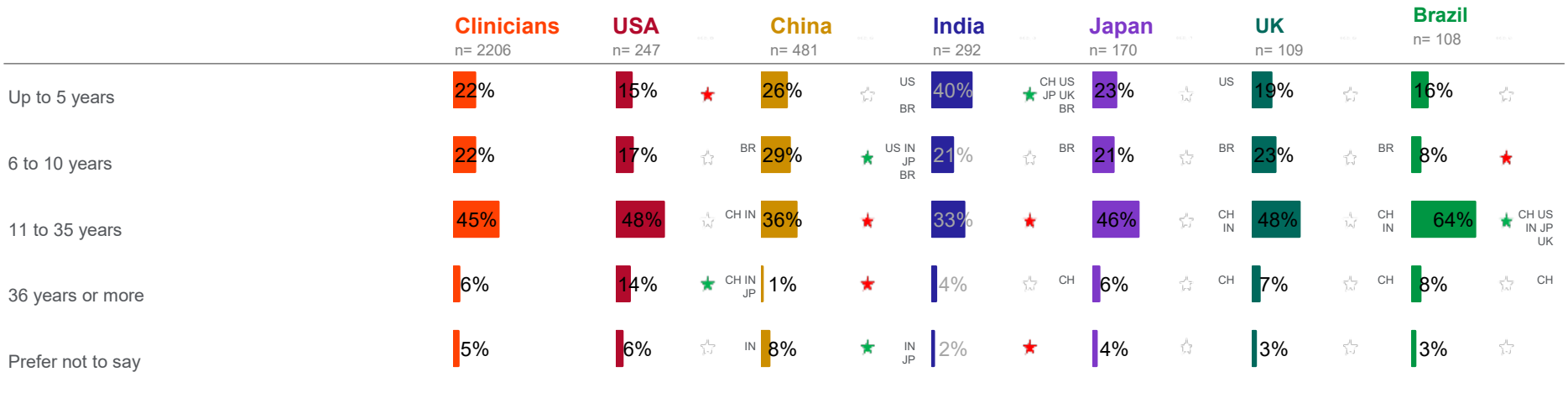
Question: Approximately, how many years have you been practicing as a clinician in your specialty?

Base: n= 425

Demographics – experience

In Brazil, the results reflect more clinicians with 11+ years' experience (72%) than the results for clinicians globally (51%)

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

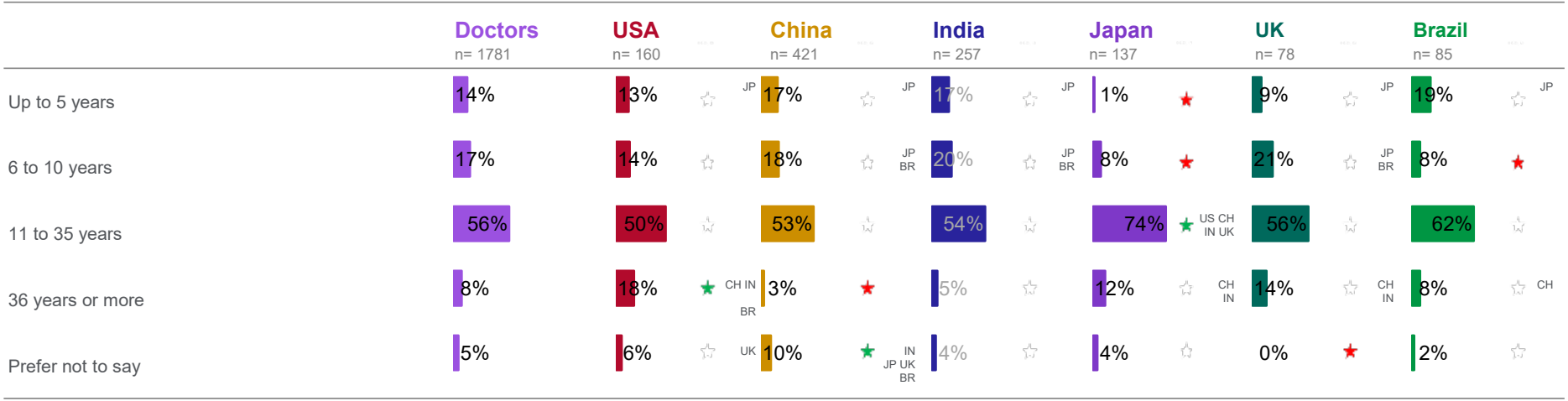
Question: Approximately, how many years have you been practicing as a clinician in your specialty?

Base: n= 2206

Demographics – experience

In Japan, the results reflect more doctors with 11-35 years' experience, nearly three in four (74%), than in the results for doctors globally (56%)

Back to home



By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

Demographics – experience

In India, the results reflect nurses with less experience than global, with nearly two thirds of nurses (63%) having up to 5 years' experience vs. half as many (30%) newer to nursing reflected in the global nursing results

Back to home

	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Up to 5 years	30%	18%	35%	US 63%	CH US UK 45%	US 29%	
6 to 10 years	27%	20%	40%	US 23%	33%	26%	Too few responses
11 to 35 years	35%	46%	CH IN JP 18%	11%	18%	39%	CH IN
36 years or more	4%	9%	CH 0%	3%	0%	0%	
Prefer not to say	5%	7%	7%	0%	3%	6%	

By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

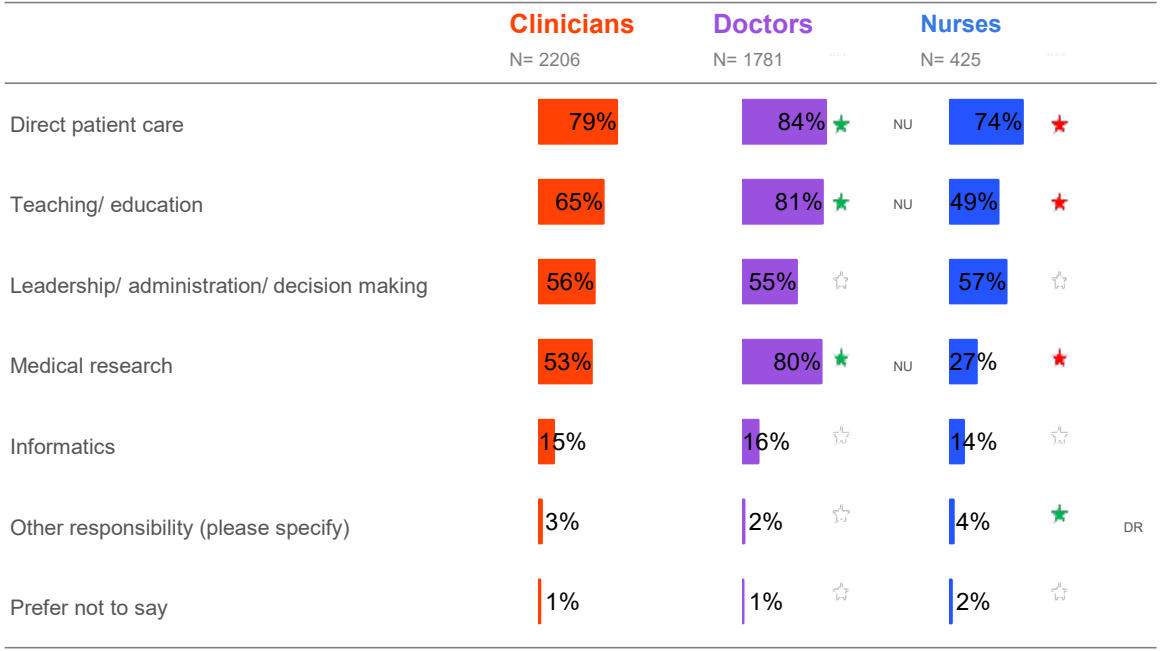
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Base: n= 425

Demographics – role

Over three quarters (79%) of the clinicians (as represented in the results) work in direct patient care, particularly doctors



Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

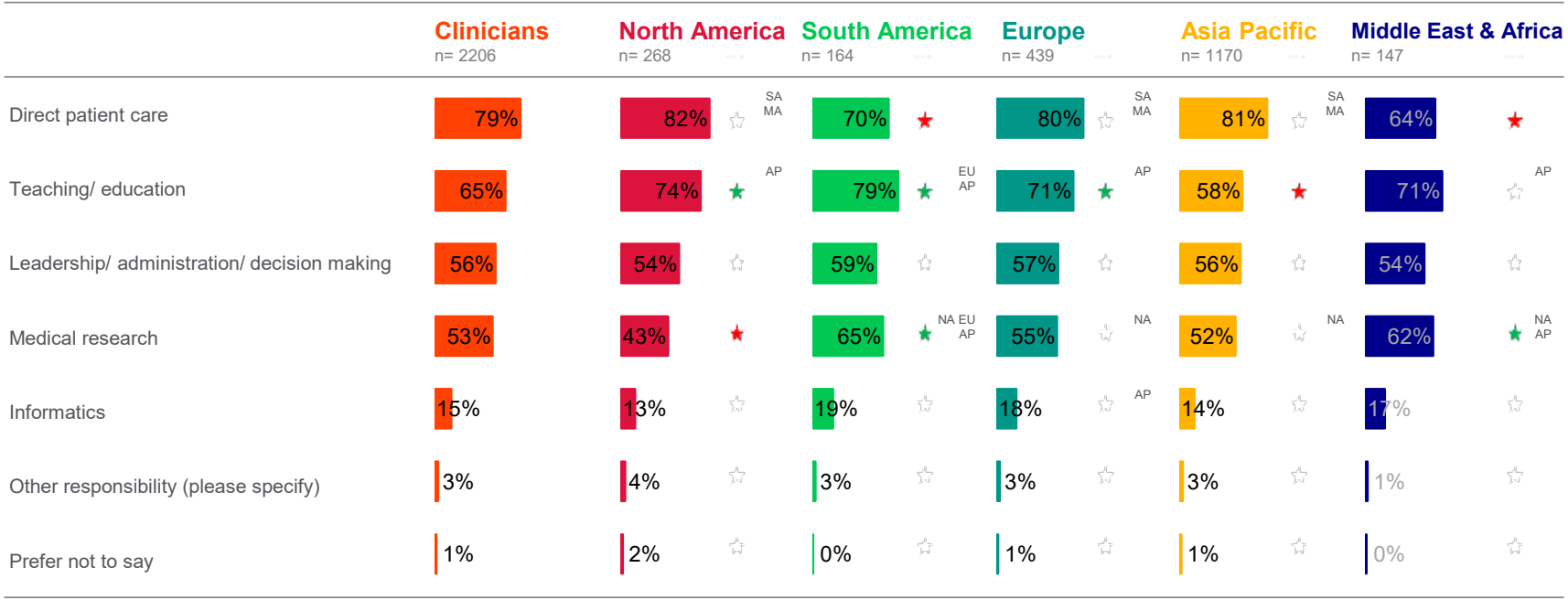
Significantly higher between position (indicated by 2 letters, e.g. DR = Doctors)

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

Base: n= 2206

Demographics – role

Fewer clinicians in North America (as represented in the results) work in medical research (43%) than in the results for clinicians globally (53%)



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

Demographics – role

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

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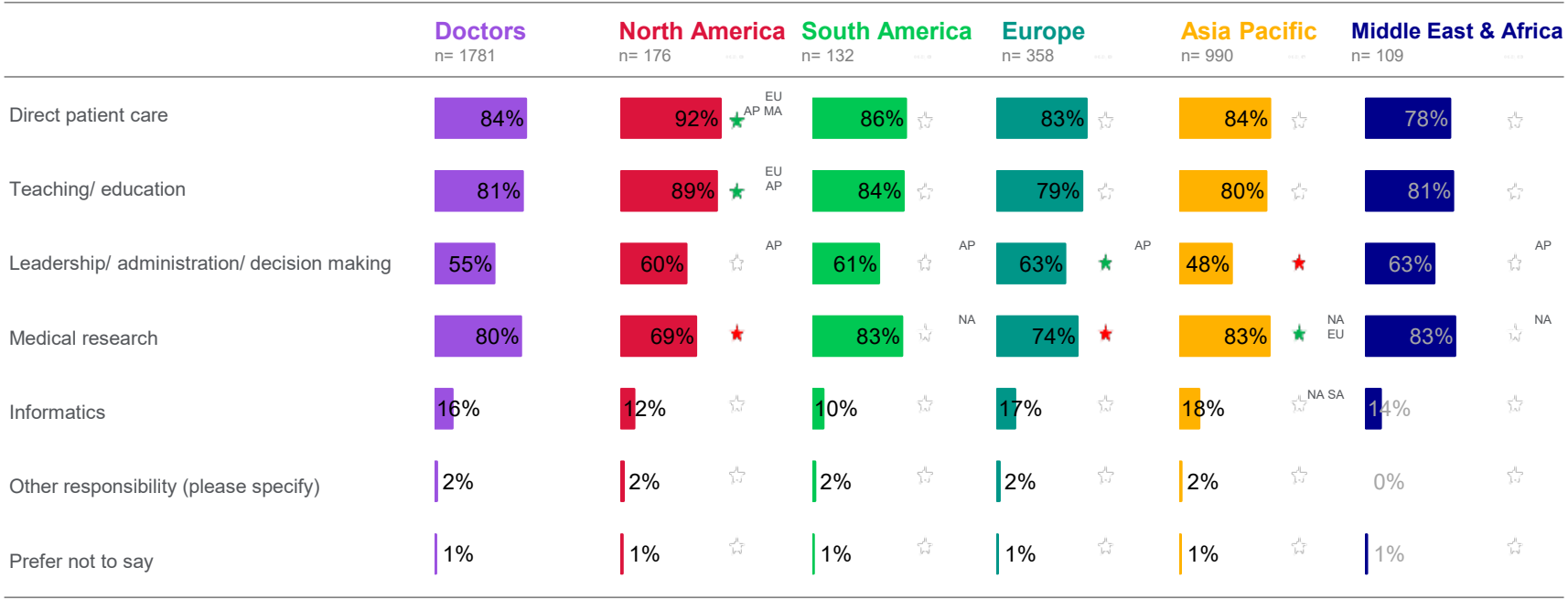

By Region

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

Demographics – role

Around half of nurses in South America (54%) and Middle East & Africa (50%), as represented in the nursing results, work in direct patient care, which is lower than in the global nursing results (74%)

Back to home

	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Direct patient care	74%	72% ☆ MA	54% ★	77% ☆ SA MA	78% ☆ SA MA	50% ★
Teaching/ education	49%	59% ☆ AP	74% ★ AP	62% ★ AP	36% ★	61% ☆ AP
Leadership/ administration/ decision making	57%	47% ☆	57% ☆	50% ☆	64% ☆ NA EU MA	45% ☆
Medical research	27%	19% ☆	47% ★ NA AP	36% ☆ NA AP	20% ☆	42% ★ NA AP
Informatics	14%	14% ☆	28% ★ AP	19% ☆ AP	9% ☆	21% ☆ AP
Other responsibility (please specify)	4%	5% ☆	3% ☆	3% ☆	4% ☆	3% ☆
Prefer not to say	2%	2% ☆	0% ☆	1% ☆	2% ☆	0% ☆

By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses ★★

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

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

Base: n= 425

Demographics – role

Around nine in ten clinicians in China (87%) and in the UK (91%), as represented in the results, work in direct patient care than in the results for clinicians globally (79%)

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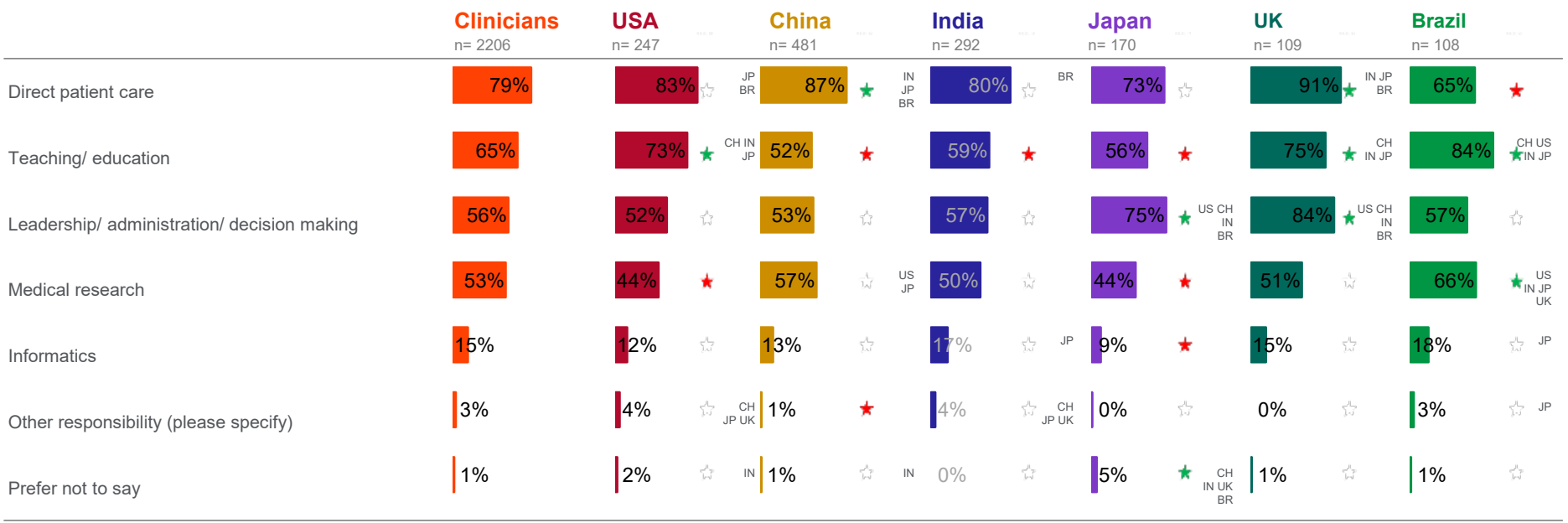
Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

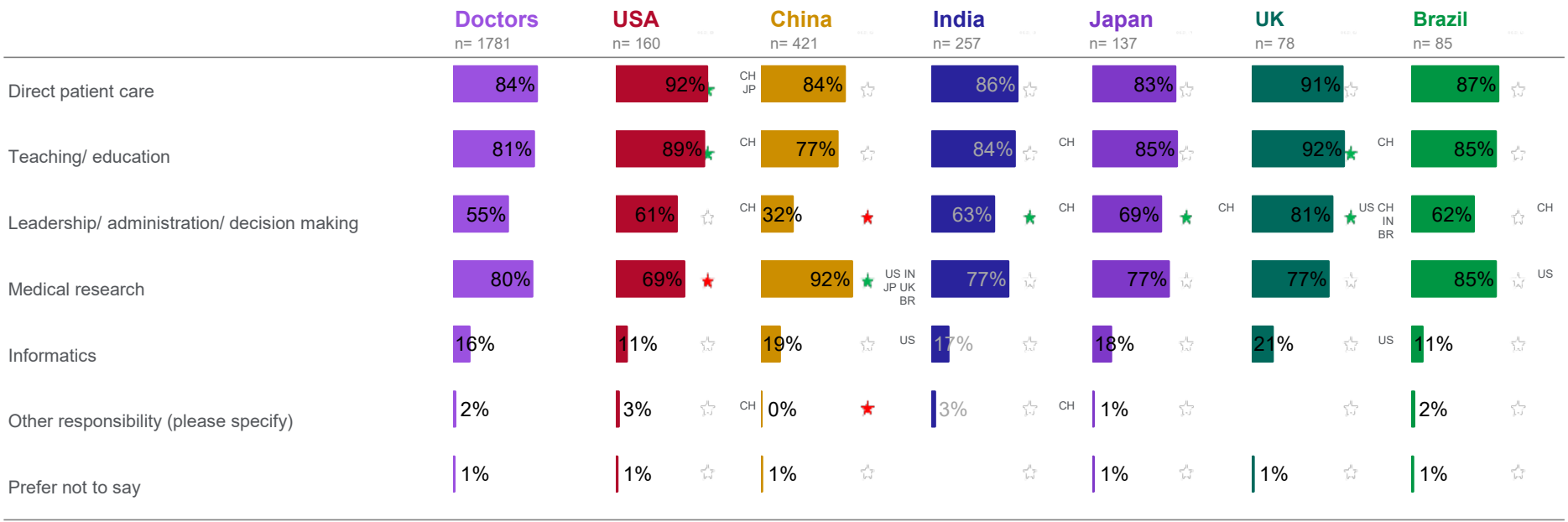
Question: Which of the following do your current responsibilities as a clinician include, if any?

Base: n= 2206

Demographics – role

Fewer doctors in China, lower than a third (32%), as represented in the results, work in leadership roles than are represented in the results for doctors globally (55%)

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

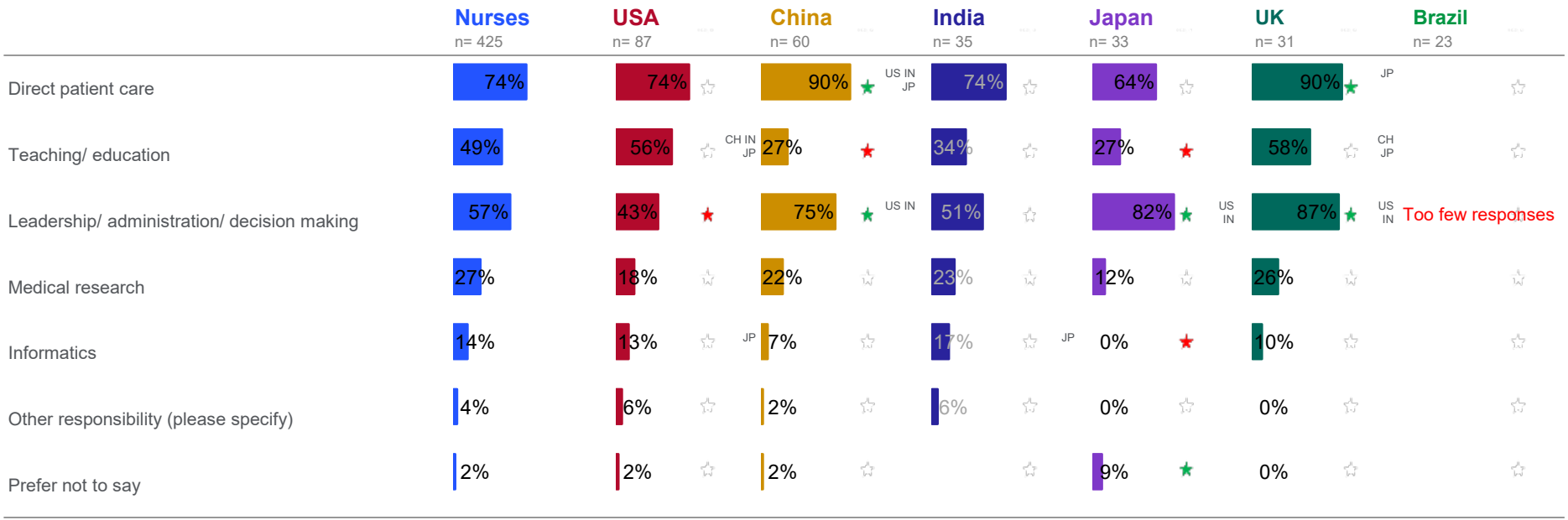
Question: Which of the following do your current responsibilities as a clinician include, if any?

Base: n= 1781

Demographics – role

Nearly half as many nurses in China and Japan (both 27%), as represented in the results, work in teaching/education as are represented in the global nursing results (49%)

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 425

Demographics – institute setting

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

Back to home

1/2	Clinicians N= 2206	Doctors N= 1781		Nurses N= 425	
Hospital/ Medical School/ Healthcare Provider	65%	66%		63%	
University	18%	18%		17%	
Integrated Health Network (IDN)	4%	1%		6%	DR
The Government	4%	3%		4%	
Other (please specify)	4%	4%		3%	
College	2%	2%		2%	
Commercial/ Corporate	2%	3%	NU	1%	

Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

Demographics – institute setting

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

2/2	Clinicians N= 2206	Doctors N= 1781	Nurses N= 425
Research Institute	1%	2%	1%
Prefer not to say	1%	1%	1%

Overall | Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

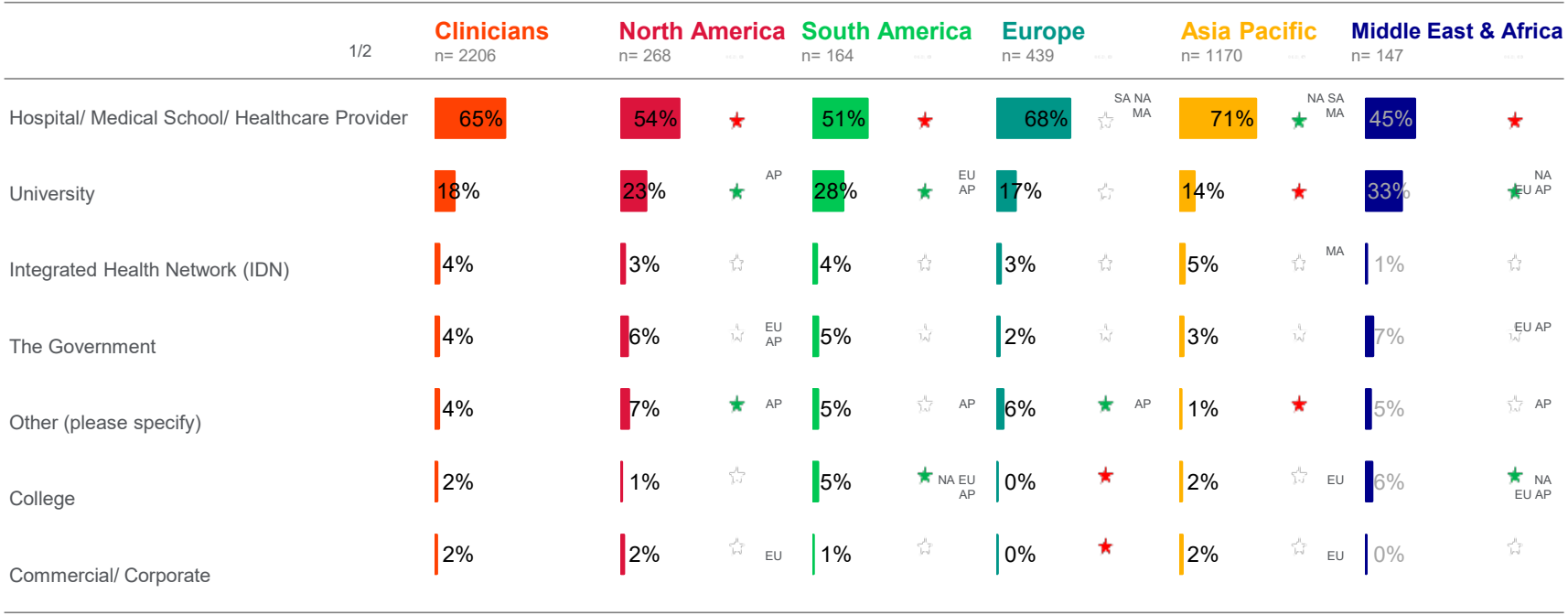
Question: Which of the following best describes your current primary place of work?

Base: n= 2206

Demographics – institute setting

More clinicians in Asia Pacific (71%) than global (65%), as represented in the results, work for a hospital, medical school or healthcare provider (1/2)

Back to home



By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

Demographics – institute setting

More clinicians in Asia Pacific (71%) than global (65%), as represented in the results, work for a hospital, medical school or healthcare provider (1/2)

Back to home

2/2	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Research Institute	1%	0% ☆	1% ☆	2% ☆ NA	1% ☆	3% ☆ NA
Prefer not to say	1%	3% ★ EU AP	1% ☆	1% ☆	1% ☆	0% ☆

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

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

Base: n= 2206

Demographics – institute setting

Around a third of doctors in North America (35%) and Middle East & Africa (32%), higher than global (18%), as represented in the results, work for a university (1/2)

Back to home

1/2

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Hospital/ Medical School/ Healthcare Provider	66%	46% ★	66% ☆ NA MA	67% ☆ NA MA	72% ★ NA MA	51% ★
University	18%	35% ★ SA EU AP	17% ☆	19% ☆ AP	13% ★	32% ★ SA EU AP
Other (please specify)	4%	9% ★ AP	4% ☆ AP	5% ☆ AP	1% ★	6% ☆ AP
The Government	3%	4% ☆	4% ☆	2% ☆	3% ☆	3% ☆
Commercial/ Corporate	3%	3% ☆ EU	2% ☆	1% ★	4% ☆ EU	1% ☆
Research Institute	2%	1% ☆	1% ☆	3% ☆	2% ☆	3% ☆
College	2%	0% ☆	1% ☆	1% ☆	3% ☆ NA EU	1% ☆

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: n= 1781

Demographics – institute setting

Around a third of doctors in North America (35%) and Middle East & Africa (32%), higher than global (18%), as represented in the results, work for a university (2/2)

Back to home

2/2	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Integrated Health Network (IDN)	1%	1% ☆	4% ★ AP	2% ☆	1% ☆	2% ☆
Prefer not to say	1%	2% ☆	1% ☆	1% ☆	1% ☆	1% ☆

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: n= 1781

Demographics – institute setting

Around a third of nurses in South America (35%) and Middle East & Africa (39%), lower than global (63%), as represented in the results, work for a hospital, medical school or healthcare provider (1/2)

1/2	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Hospital/ Medical School/ Healthcare Provider	63%	61% SA MA	35%	68% SA MA	69% SA MA	39%
University	17%	12%	40% NA EU AP	15%	14%	34% NA EU AP
Integrated Health Network (IDN)	6%	6%	3%	5%	9%	
The Government	4%	8%	6%	3%	3%	11%
Other (please specify)	3%	6% AP	6%	6% AP	1%	3%
College	2%	1%	9% NA EU AP	0%	2%	11% NA EU AP
Prefer not to say	1%	4% AP		1%	1%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

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

Base: n= 425

Demographics – institute setting

Around a third of nurses in South America (35%) and Middle East & Africa (39%), lower than global (63%), as represented in the results, work for a hospital, medical school or healthcare provider (2/2)

Back to home

2/2	Nurses n= 425	North America n= 92	South America n= 32	Europe n= 81	Asia Pacific n= 180	Middle East & Africa n= 38
Research Institute	1%	0%	Too few responses	1%	1%	3%
Commercial/ Corporate	1%	2%			1%	

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

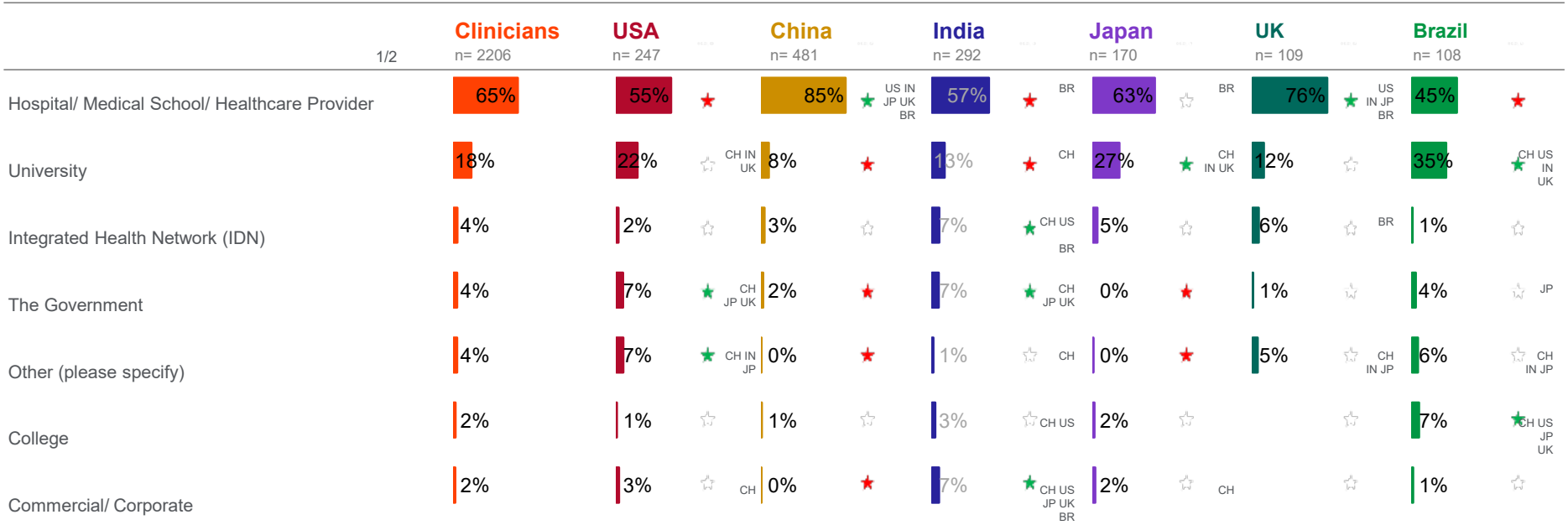
Question: Which of the following best describes your current primary place of work?

Base: n= 425

Demographics – institute setting

Over three quarters of clinicians in China (85%) and the UK (76%), as represented in the results, work for a hospital, medical school or healthcare provider, which is higher than seen globally (65%) (1/2)

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

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

Base: n= 2206

Demographics – institute setting

Over three quarters of clinicians in China (85%) and the UK (76%), as represented in the results, work for a hospital, medical school or healthcare provider, which is higher than seen globally (65%) (2/2)

ELSEVIER

Back to home

2/2	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Research Institute	1%	0% ☆	0% ★	3% ★ CH US JP	0% ☆	☆	1% ☆
Prefer not to say	1%	4% ★ CH IN	0% ☆	1% ☆	2% ☆	1% ☆	1% ☆

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

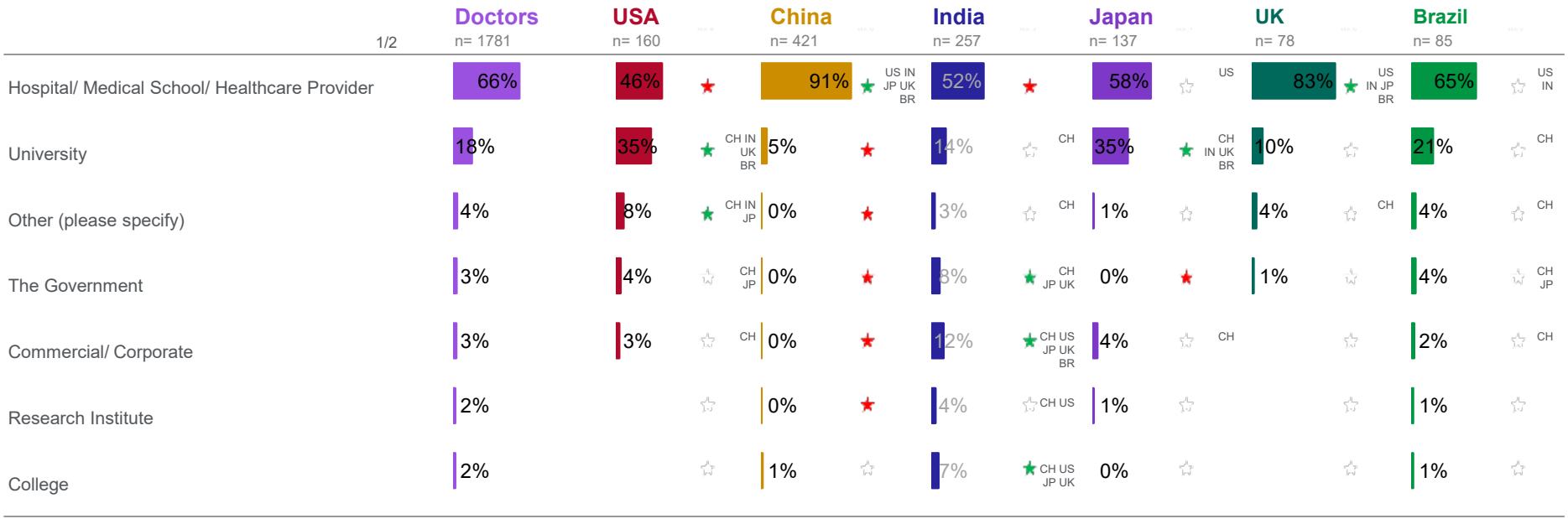
Question: Which of the following best describes your current primary place of work?

Base: n= 2206

Demographics – institute setting

Around twice as many doctors in the USA and Japan (both 35%) than globally (18%), as represented in the results, work for a university (1/2)

Back to home



By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

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

Base: n= 1781

Demographics – institute setting

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)

Back to home

2/2	Doctors n= 1781	USA n= 160	China n= 421	India n= 257	Japan n= 137	UK n= 78	Brazil n= 85
Integrated Health Network (IDN)	1%	1% ☆ CH		0% ☆	☆	☆	1% ☆ CH
Prefer not to say	1%	3% ☆	1%	1% ☆	1% ☆	1% ☆	1% ☆

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors ★★

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

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

Base: n= 1781

Demographics – institute setting

Eight in ten nurses in China (80%), higher than global (63%), as represented in the results, work for a hospital, medical school or healthcare provider (1/2)

ELSEVIER

Back to home

1/2

	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Hospital/ Medical School/ Healthcare Provider	63%	64%	80% ★ US	63%	67%	68%	
University	17%	8% ★	10%	11%	18%	13%	
Integrated Health Network (IDN)	6%	3%	7%	14% US	9%	13%	Too few responses
The Government	4%	9%	3%	6%			
Other (please specify)	3%	7% CH				6% CH	
College	2%	1%			3%		
Prefer not to say	1%	5% ★			3%		

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

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

Base: n= 425

Demographics – institute setting

Eight in ten nurses in China (80%), higher than global (63%), as represented in the results, work for a hospital, medical school or healthcare provider (2/2)

Back to home

2/2	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Research Institute	1%		Too few responses	3%		Too few responses	
Commercial/ Corporate	1%	2%		3%			

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

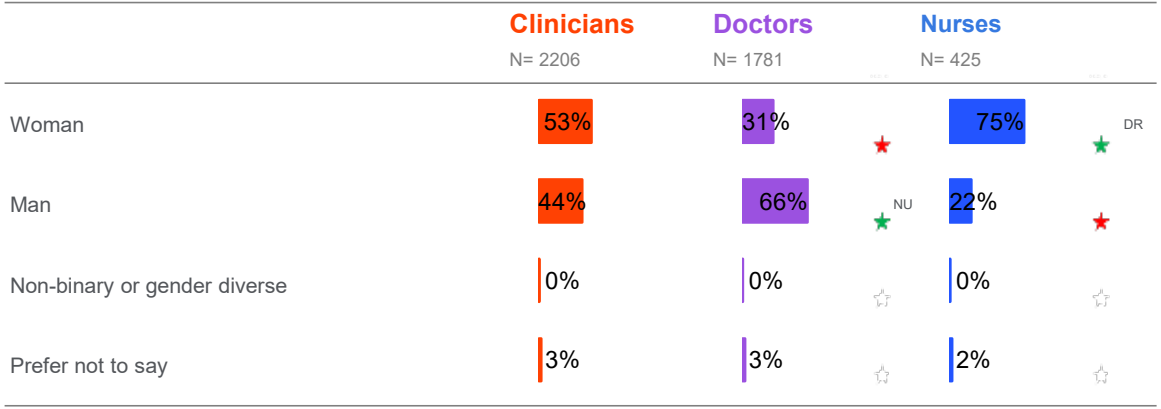
Significantly higher between countries (indicated by 2 letters, e.g. CH = China)

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

Base: n= 425

Demographics – gender

The results reflect the views of both male and female clinicians



Overall

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

Question: Which gender do you most identify with?

Base: n= 2206

Demographics – gender

In South America, there is higher representation of female clinicians in the results (63%) than in the results for clinicians globally (53%)

Back to home

	Clinicians n= 2206	North America n= 268	South America n= 164	Europe n= 439	Asia Pacific n= 1170	Middle East & Africa n= 147
Woman	53%	55%	63% EU AP MA	48%	54% EU	49%
Man	44%	37%	37%	51% SA NA AP	43%	46%
Non-binary or gender diverse	0%			1%	0%	2% NA AP
Prefer not to say	3%	8% SA EU AP MA		1%	3% SA EU	3% SA EU

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians

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

Question: Which gender do you most identify with?

Base: n= 2206

Demographics – gender

In South America, there is higher representation in the results of female doctors (43%) than in the results for doctors globally (31%)

Back to home

	Doctors n= 1781	North America n= 176	South America n= 132	Europe n= 358	Asia Pacific n= 990	Middle East & Africa n= 109
Woman	31%	35%	43% EU AP MA	33%	28%	29%
Man	66%	58%	57%	65%	69% NA SA	66%
Non-binary or gender diverse	0%			0%	0%	2%
Prefer not to say	3%	7% SA EU AP	0%	1%	3%	3%

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

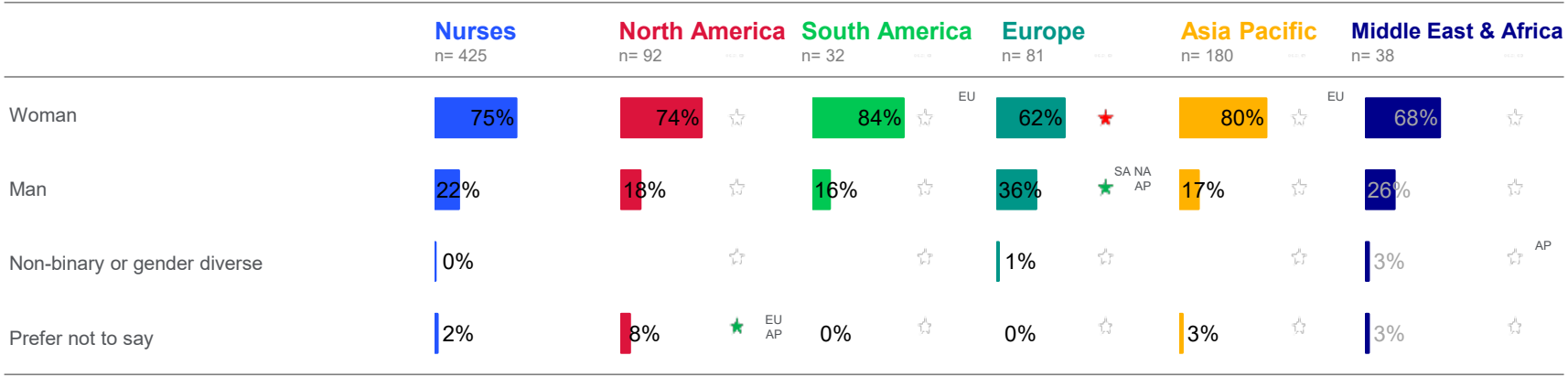
Question: Which gender do you most identify with?

Base: n= 1781

Demographics – gender

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

Back to home



By Region

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

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

Question: Which gender do you most identify with?

Base: n= 425

Demographics – gender

In Brazil, there is higher representation of female clinicians in the results (66%) than in the results for clinicians globally (53%)

Back to home

	Clinicians n= 2206	USA n= 247	China n= 481	India n= 292	Japan n= 170	UK n= 109	Brazil n= 108
Woman	53%	55% ☆	55% ☆	53% ☆	47% ☆	51% ☆	66% ★ CH IN JP UK
Man	44%	37% ★	43% ☆	44% ☆	48% ☆	48% ☆	34% ★
Non-binary or gender diverse	0%	☆	☆	1% ☆	☆	☆	☆
Prefer not to say	3%	8% ★ CH IN UK BR	2% ☆	2% ☆	5% ★ CH BR	1% ☆	☆

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

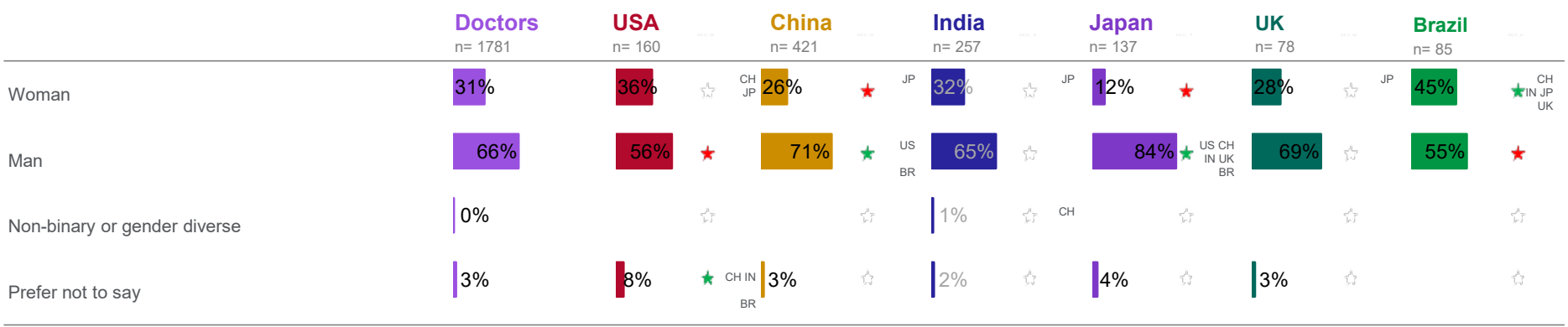
Question: Which gender do you most identify with?

Base: n= 2206

Demographics – gender

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

Back to home



By Key Country

Clinicians | **Doctors** | Nurses

Significantly higher/ lower than all doctors

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

Question: Which gender do you most identify with?

Base: n= 1781

Demographics – gender

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

Back to home

	Nurses n= 425	USA n= 87	China n= 60	India n= 35	Japan n= 33	UK n= 31	Brazil n= 23
Woman	75%	74%	83%	74%	82%	74%	
Man	22%	17%	15%	23%	12%	26%	Too few responses
Non-binary or gender diverse	0%	0%	0%	0%	0%	0%	
Prefer not to say	2%	9%	2%	3%	6%	0%	

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses

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

Question: Which gender do you most identify with?

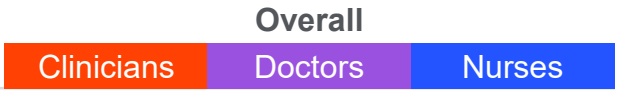
Base: n= 425

Demographics – age

The results reflect the views of a spread of age groups

Back to home

	Clinicians N= 1938	Doctors N= 1560	Nurses N= 378
21-35 years old	31%	19%	42% DR
36-45 years old	27%	30% NU	24%
46-55 years old	22%	25% NU	18%
56+ years old	21%	27% NU	16%



Significantly higher/ lower than all clinicians

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

Question: Please record your age in years in the space provided, as of your last birthday. "Prefer not to say" answers are excluded from the responses.

Base: n= 1938

Demographics – age

In Asia Pacific, there is a higher representation in the results of younger clinicians (under 35) and a lower representation in the results of older clinicians (aged 46+).

Back to home

	Clinicians n= 1938	North America n= 226	South America n= 152	Europe n= 413	Asia Pacific n= 1001	Middle East & Africa n= 137
21-35 years old	31%	11% ★	14% ★	22% ★ SA NA	43% ★ NA SA EU MA	18% ★
36-45 years old	27%	20% ★	28% ☆	23% ☆	29% ☆ NA EU	29% ☆ NA
46-55 years old	22%	24% ☆ AP	27% ☆ AP	25% ☆ AP	17% ★	35% ★ NA EU AP
56+ years old	21%	45% ★ SA EU AP MA	31% ★ AP MA	29% ★ AP MA	11% ★	18% ☆ AP

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

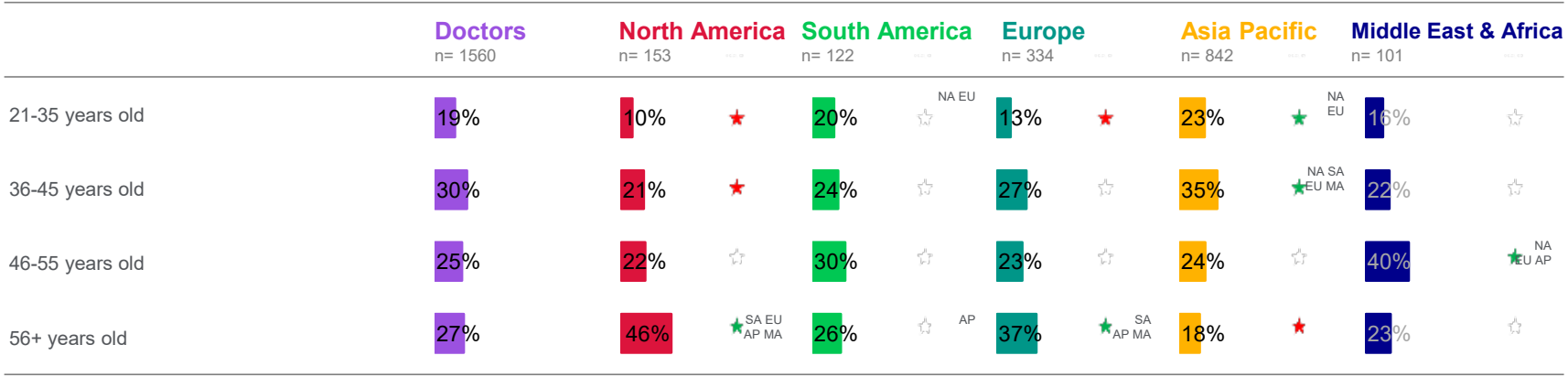
Significantly higher between regions (indicated by 2 letters, e.g. AP = Asia Pacific)

Question: Please record your age in years in the space provided, as of your last birthday. "Prefer not to say" answers are excluded from the responses.

Base: n= 1938

Demographics – age

In North America (46%) and Europe (37%), there is a higher representation in the results of older doctors (56+ years) than in the results for doctors globally (27%)



Back to home

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

Question: Please record your age in years in the space provided, as of your last birthday. "Prefer not to say" answers are excluded from the responses.

Base: n= 1560

Demographics – age

In Asia Pacific, there is a higher representation in the results of younger nurses (62% are under 35) than in the results for nurses globally (42%)

Back to home

	Nurses n= 378	North America n= 73	South America n= 30	Europe n= 79	Asia Pacific n= 159	Middle East & Africa n= 36
21-35 years old	42%	12% ★	7% ★	32% ☆ SA NA	62% ★ NA SA EU MA	19% ★
36-45 years old	24%	19% ☆	33% ☆	19% ☆	23% ☆	36% ☆ EU
46-55 years old	18%	25% ☆ AP	24% ☆	27% ☆ AP	11% ★	31% ☆ AP
56+ years old	16%	44% ★ EU AP MA	36% ★ AP MA	22% ☆ AP	4% ★	14% ☆ AP

By Region

Clinicians | Doctors | Nurses

Significantly higher/ lower than all nurses ★★

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

Question: Please record your age in years in the space provided, as of your last birthday. "Prefer not to say" answers are excluded from the responses.

Base: n= 378

Demographics – age

In the USA, there is a higher representation in the results of older clinicians (42% are aged 56+) than in the results for clinicians globally (21%)

Back to home

	Clinicians n= 1938	USA n= 206	China n= 383	India n= 272	Japan n= 149	UK n= 101	Brazil n= 105
21-35 years old	31%	11%	48% ★ US JP UK BR	54% ★ US JP UK BR	35% ☆ US BR	25% ☆ US BR	14% ★
36-45 years old	27%	21%	35% ★ US IN JP	21% ☆	23% ☆	25% ☆	31% ☆ IN
46-55 years old	22%	26% ☆ CH IN	12% ★	14% ★	27% ☆ CH IN	22% ☆ CH	23% ☆ CH IN
56+ years old	21%	42% ★ CH IN JP UK	4% ★	11% ★ CH	15% ☆ CH	27% ☆ CH IN JP	32% ★ CH IN JP

By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all clinicians ★★

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

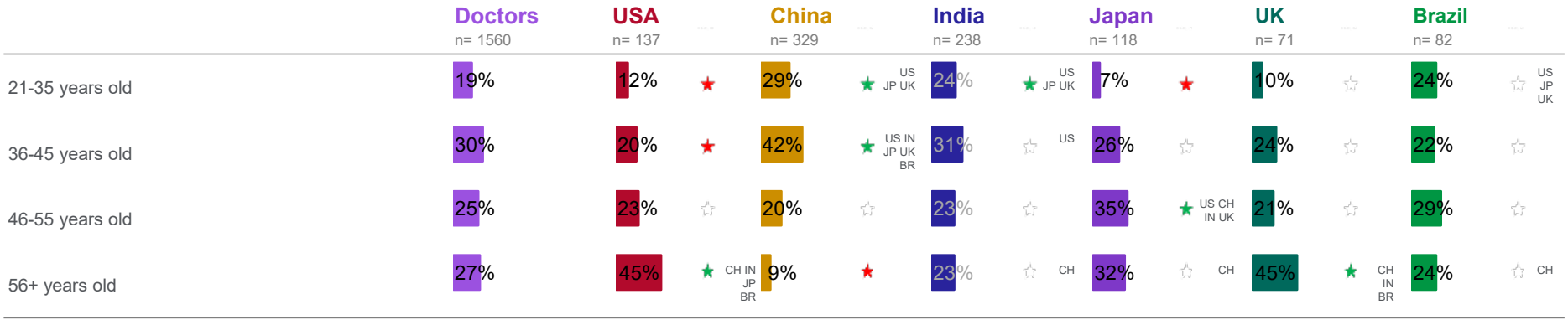
Question: Please record your age in years in the space provided, as of your last birthday. "Prefer not to say" answers are excluded from the responses.

Base: n= 1938

Demographics – age

In China, there is a higher representation in the results of younger doctors (70% are under 45) than in the results for doctors globally (48%)

Back to home



By Key Country

Clinicians | Doctors | Nurses

Significantly higher/ lower than all doctors

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

Question: Please record your age in years in the space provided, as of your last birthday. "Prefer not to say" answers are excluded from the responses.

Base: n= 1560

Demographics – age

In the USA, there is a higher representation in the results of older nurses (two thirds, 68%, are aged 46+) than in the results for nurses globally (where this is one third, 34%)

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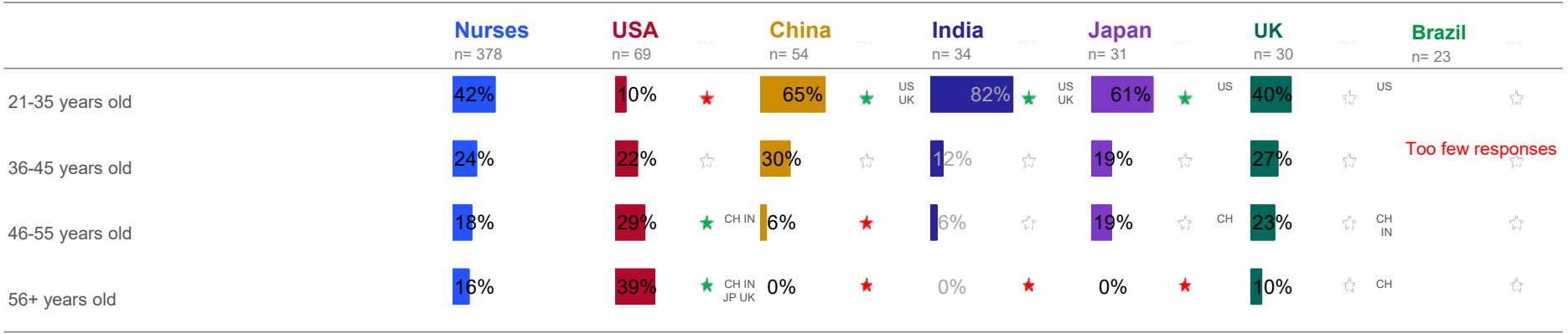

By Key Country

Clinicians | Doctors | **Nurses**

Significantly higher/ lower than all nurses

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

Question: Please record your age in years in the space provided, as of your last birthday. "Prefer not to say" answers are excluded from the responses.

Base: n= 378