

2023 Digital Life Patient Report

Digital Solutions
Jan 2024



We have witnessed the tremendous changes of digital engagement for both physician and patients over the past 11 years

2012 Digital Life Physician	2017 Digital Life Physician / Patient	2018 Digital Life Physician / Patient	2019 Digital Life Physician / Patient	2020 Digital Life Physician / Patient / Pharmacist / POV	2021 Digital Life Physician / Patient / Pharmacist / POV	2022 Digital Life Physician / Patient / Pharmacist
2014 Digital Life Physician	+ 48% of physicians rely heavily on digital channels in the medical field	+ Physicians spend 29 hours online per week which reach the saturated level	+ Physicians increase over 70% online time compared with 2014	+ 75% of physicians subscribe pharmaceutical companies' public accounts	+ Physician Online time for medical-related activities increases to 24.5 hours per week	+ Physicians spend 3 online hours per week for pharmaceutical company
2015 Digital Life Physician	+ 48% of physicians are more satisfied with innovative activities	+ Physician engagement in digital getting lower compared with before, pharm need to be more truly innovative and inspiring	+ Physicians are willing to spend over 6 hours per week for online consultation.	+ 44% of physicians participate in WeChat group sponsored by pharmaceutical company	+ In 2021, physicians subscribe 13 medical related public accounts in average	+ In 2022, More than 80% of physicians have done online popularization of science, with 42% of them doing it for more than 4 years
2016 Digital Life Physician	+ 45% of patients have asked their doctors for a prescription and 17% of patients successfully ask for a prescription change	+ 28% of online time are medical related	+ Patients spend 8 hours per week for medical related activities	+ 88% of patients search online medical/disease education articles	+ 22% increase in the amount of time patients spend online for medical-related purposes compared to 2020	+ Patients spend 6 online hours per week for medical-related content videos
+ Over 60% medical information are acquired from Innovative channel		+ 28% of patients successfully ask for a prescription change		+ 66% of patients purchase medicine online	+ The annual cost of online purchase is 1918 RMB, which has increased 7.5% compared to 2020	+ 45% of patients claimed physicians will actively prescribe or recommend out-of-hospital drug purchases
+ 97% of physicians subscribe medical related public accounts						
+ 91% of physicians install medical related APPs						

Great thanks to Our Partner JKT

15years+ Industry experience

-2004-Now-

Integrate the application ecosystem of internet medical users such as Asia Pacific Medical institutions, pharmaceutical enterprises, physicians, nurses, pharmacists, retail pharmacies and patients



Our team

- Many branches -

Beijing, Shanghai, Shenyang, Panjin, overseas, etc

- Team -

Consulting, Sales
Operational, Data
Technology



Core database

-Real world data-

Clinical data covering 2400 hospitals

- Physician database -

A database of 4.6 million physicians accumulated through regular assessment of Chinese physician



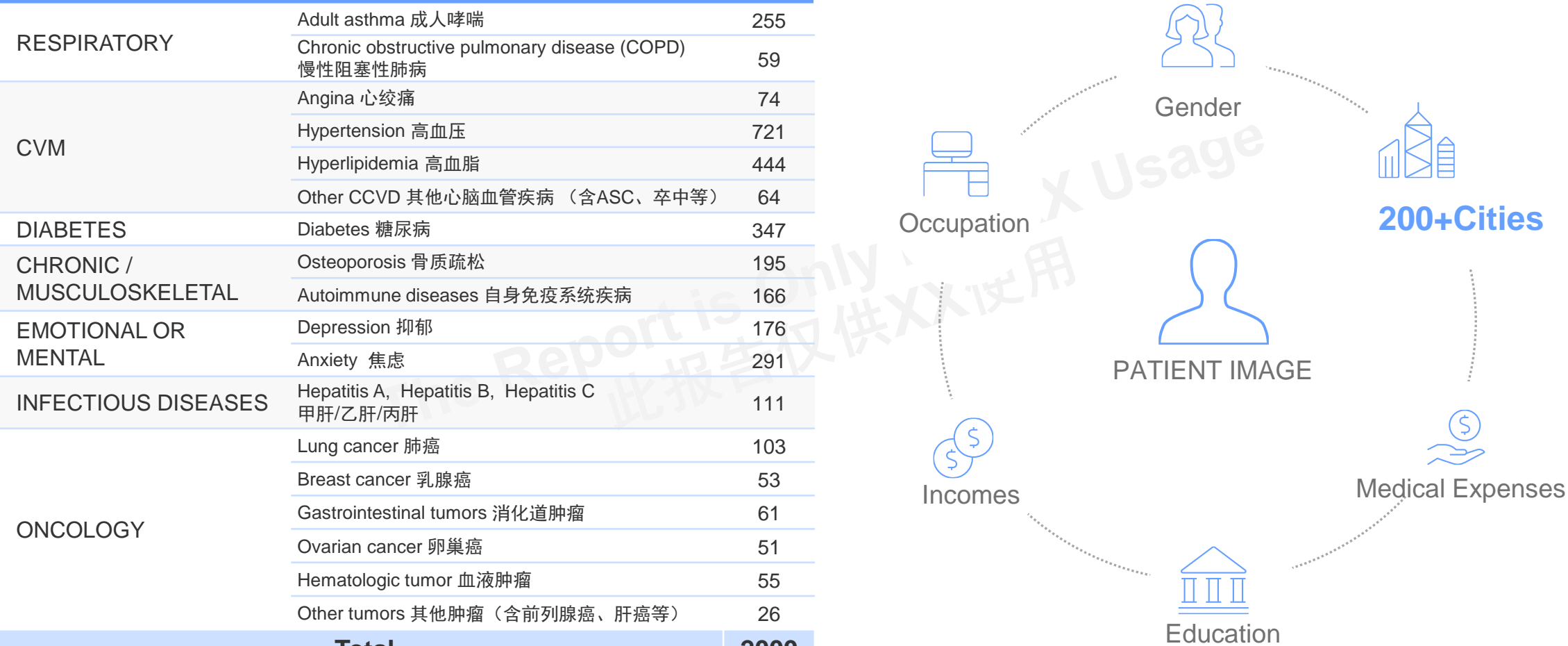
2000

The largest patient online survey
in China PURELY focusing on
picturing their REAL MEDICAL
LIFE in digital environment



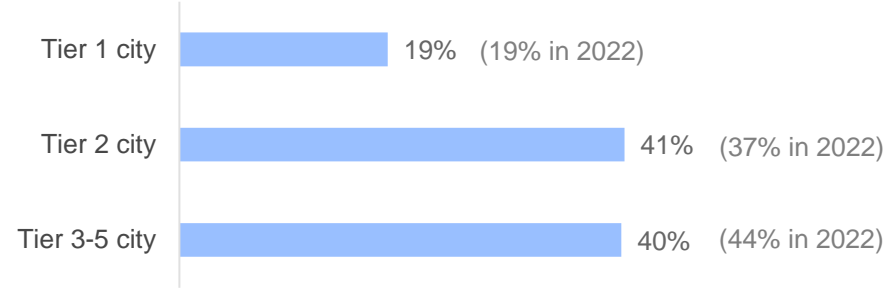
Who are they?

Disease		Total
RESPIRATORY	Adult asthma 成人哮喘	255
	Chronic obstructive pulmonary disease (COPD) 慢性阻塞性肺病	59
CVM	Angina 心绞痛	74
	Hypertension 高血压	721
	Hyperlipidemia 高血脂	444
	Other CCVD 其他心脑血管疾病（含ASC、卒中等）	64
DIABETES	Diabetes 糖尿病	347
CHRONIC / MUSCULOSKELETAL	Osteoporosis 骨质疏松	195
	Autoimmune diseases 自身免疫系统疾病	166
EMOTIONAL OR MENTAL	Depression 抑郁	176
	Anxiety 焦虑	291
INFECTIOUS DISEASES	Hepatitis A, Hepatitis B, Hepatitis C 甲肝/乙肝/丙肝	111
	Lung cancer 肺癌	103
ONCOLOGY	Breast cancer 乳腺癌	53
	Gastrointestinal tumors 消化道肿瘤	61
	Ovarian cancer 卵巢癌	51
	Hematologic tumor 血液肿瘤	55
	Other tumors 其他肿瘤（含前列腺癌、肝癌等）	26
Total		2000

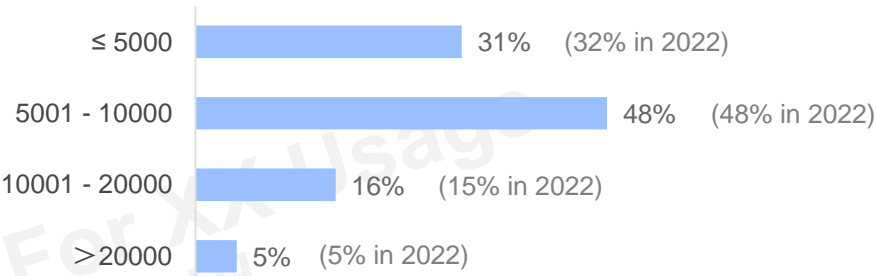


Patient Profile

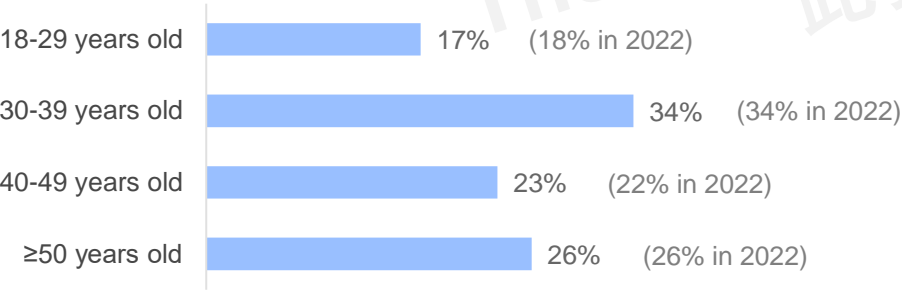
200+ CITIES



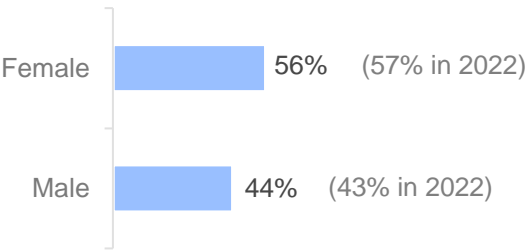
PERSONAL INCOME (RMB/Month)



AGE

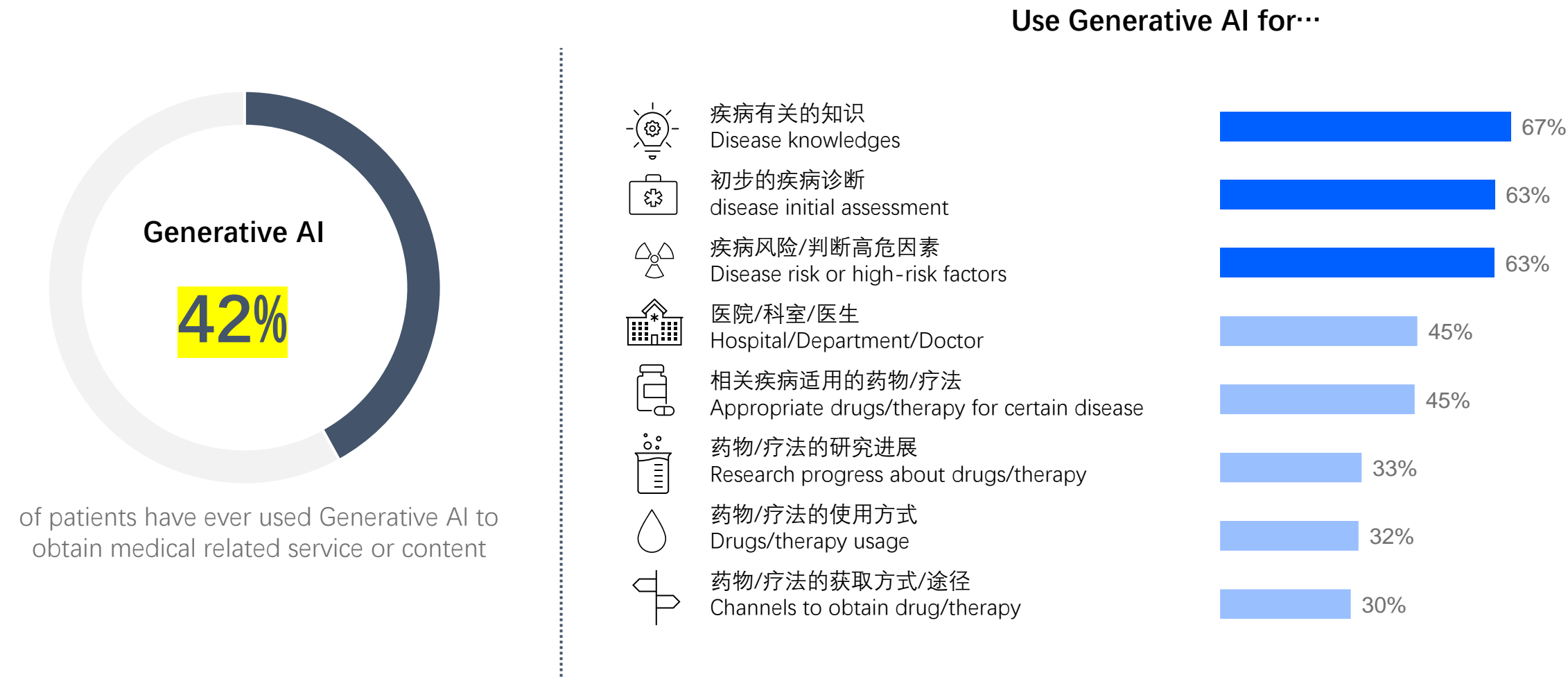


GENDER



Base: 2023 Digital Life Patient - Total 2000


Forty-two percent of patients have leveraged generative AI to access medical information and services.



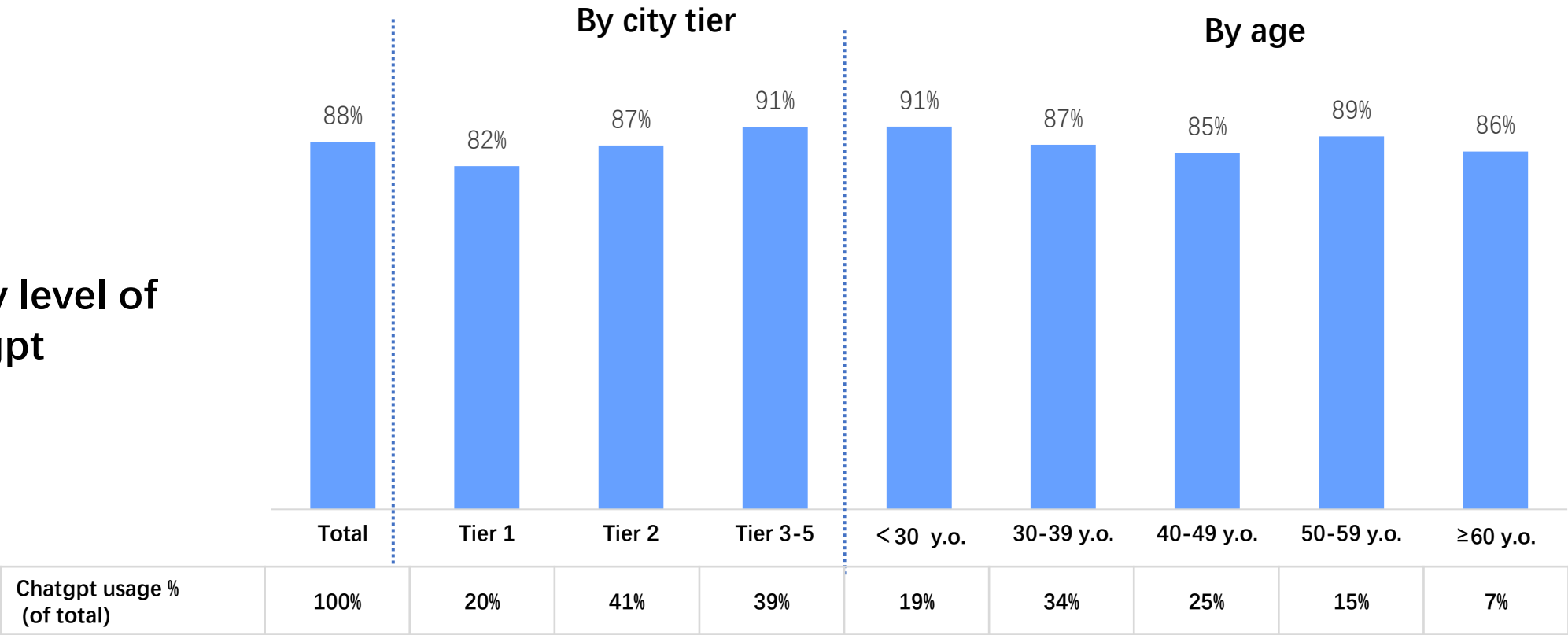
Base: 2023 Digital Life Patient - Total 2000

Source: Q78a 请问您是否使用过智能对话模型（chatgpt，如：文心一言、通义千问、悟道等）来获取医学相关服务和内容？
Q78b 使用智能对话模型是为了获取哪些方面的医学相关服务和内容？

Most patient trust Chatgpt quite well, especially from lower city tiers and younger generation.




Trustworthy level of Chatgpt

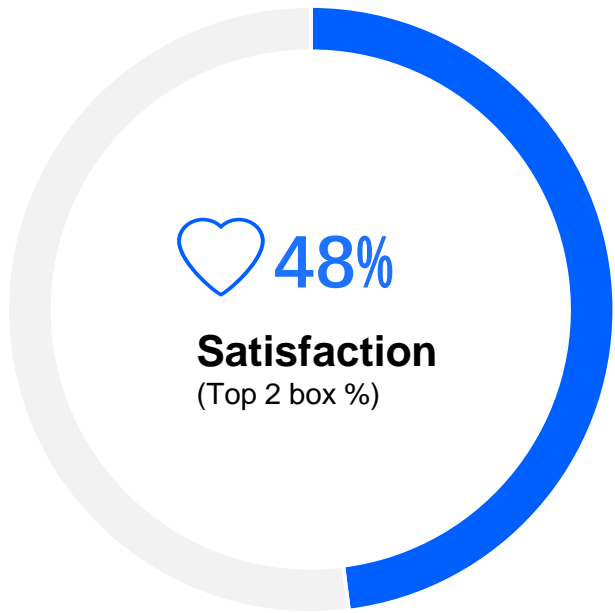
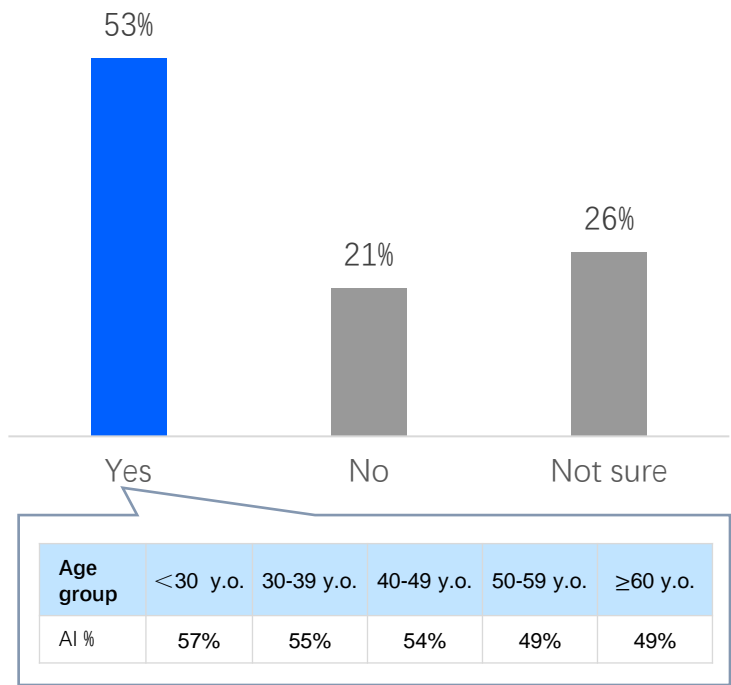


Base: 2023 Digital Life Patient – those who used Chatgpt to obtain pharmaceutical related service or content 843 | Tier 1 167 | Tier 2 344 | Tier 3-5 332 | Age <30 163 | Age 30-39 287 | Age 40-49 210 | Age 50-59 128 | Age ≥60 55

Source: Q78c. 【针对Q78a勾选码1的被访者询问】 针对您使用智能对话模型查询到的这些医学相关服务和内容， 您认为可信度如何？ (5-非常可信/可靠,4-有些可信/可靠,3-不确定,2-不太可信/可靠,1-完全不可信/不可靠)

Over half of the patients have interacted with Chatbots during their online consultations, yet only 48% report being satisfied with the service

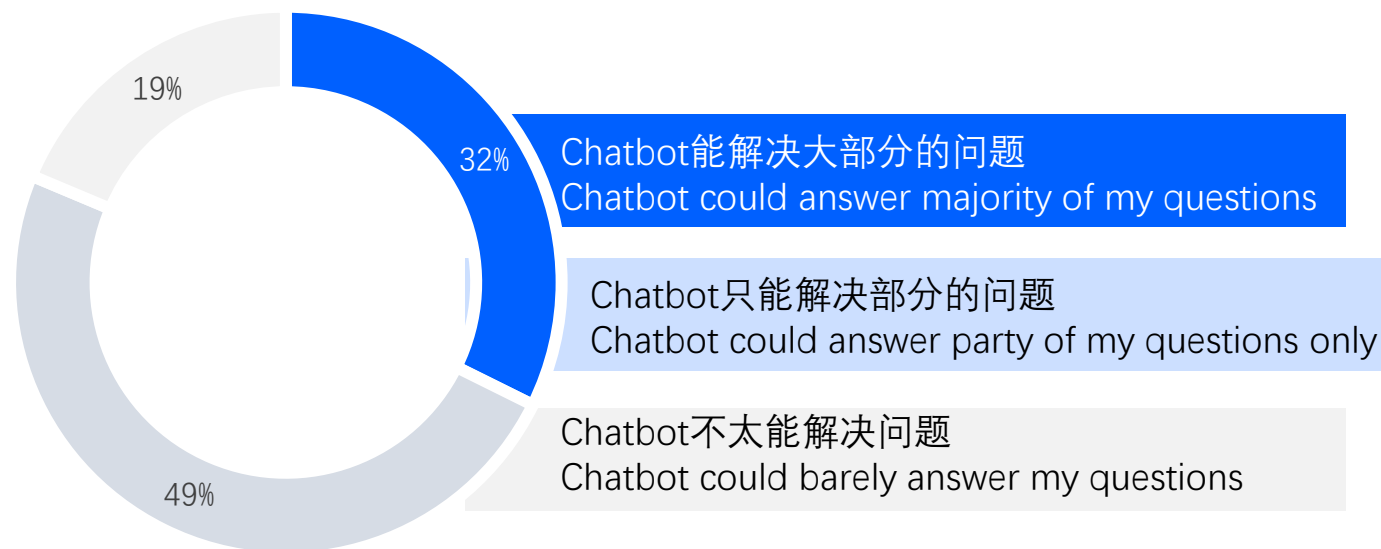
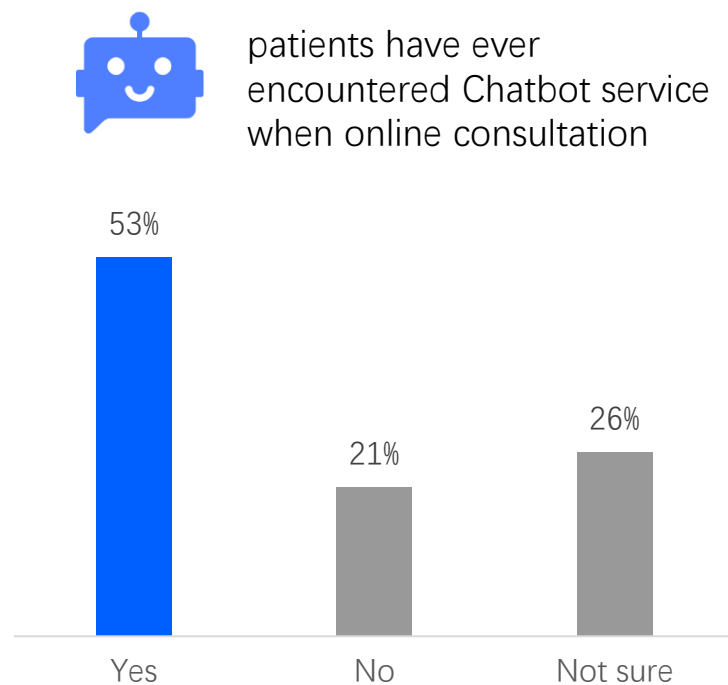
 patients have ever encountered customer service Chatbot when online consultation



Base: 2023 Digital Life Patient - Patient who use online consultation 1361

Source: Q74. 【针对Q5勾选了51, 61的被访者】请问您在线上进行远程就诊或在线问诊/咨询, 是否遇到过AI/人工智能客服为您服务?
Q75a. 【针对Q74勾选了1的被访者】您认为AI/人工智能在远程就诊或在线问诊/咨询服务表现如何?

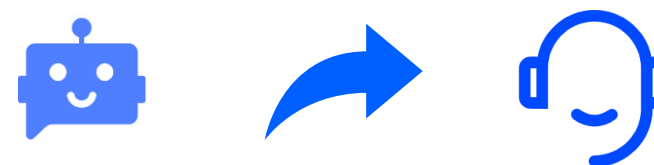
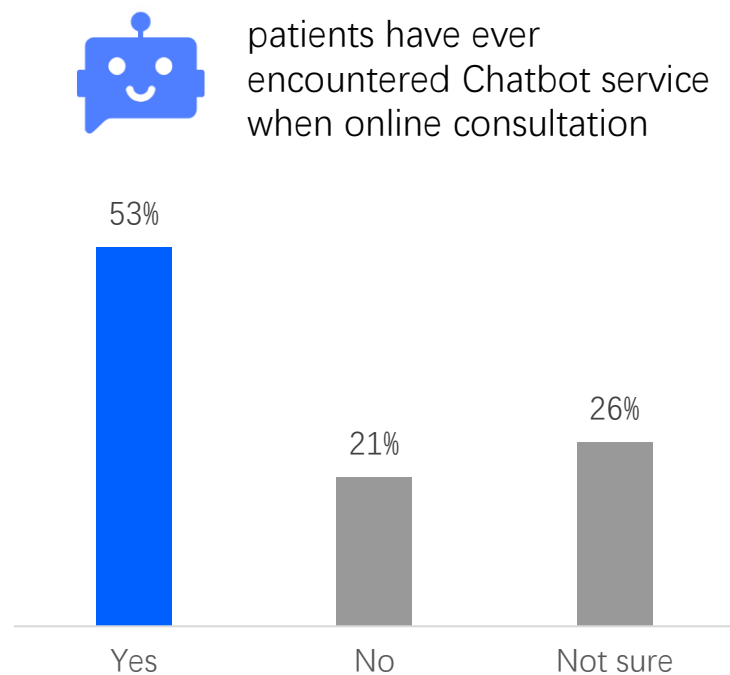
Even more than half patients have been served by Chatbot, they are still not happy with its competence to answer questions.



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Source: Q74. 【针对Q5勾选了51, 61的被访者】请问您在线上进行远程就诊或在线问诊/咨询, 是否遇到过AI/人工智能客服为您服务?
Q75b. 【针对Q74勾选了1的被访者】AI/人工智能在在线问诊/咨询服务过程中, 是否能解决您的问题?

Furthermore, 38% of patients prefer to switch to human customer service when they encounter issues with Chatbots



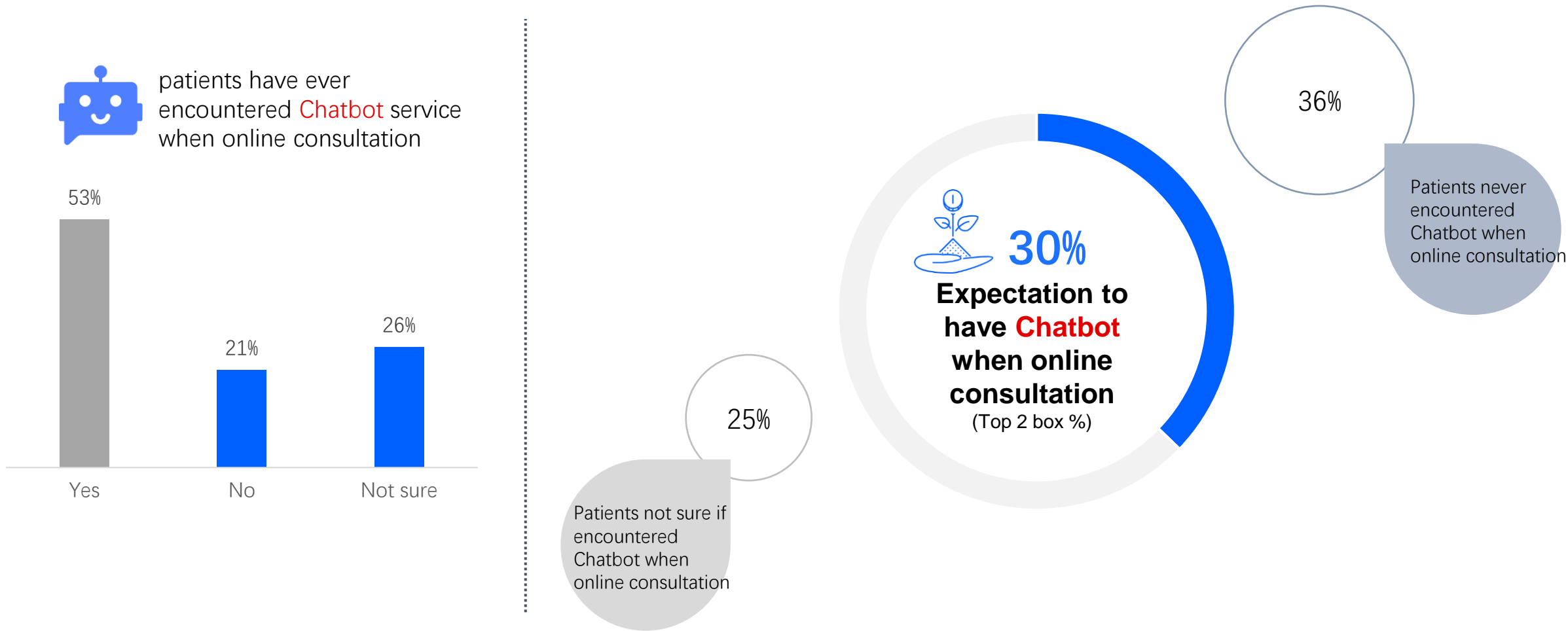
38%

patients changed to real people service from Chatbot

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Source: Q74. 【针对Q5勾选了51, 61的被访者】请问您在线上进行远程就诊或在线问诊/咨询, 是否遇到过AI/人工智能客服为您服务?
Q75c. 【针对Q74勾选了1的被访者】在在线问诊/咨询服务过程中, 有多少情况会您会主动要求从AI/人工智能转为人工服务?

Half of the patients lack experience with Chatbots, resulting in relatively lower expectations for their utility.



Base: 2023 Digital Life Patient - Patient who use online consultation 1361

Source: Q74. 【针对Q5勾选了51, 61的被访者】 请问您在线上进行远程就诊或在线问诊/咨询, 是否遇到过AI/人工智能客服为您服务?
Q76. 【针对Q74勾选了2或3的被访者】 如果在您远程就诊或在线问诊/咨询时, 出现了AI/人工智能客服为您服务, 您的态度是? (单选)