

THE STATE OF UROLOGY

Capturing Transformation, Challenges and Opportunities in the field of Urology



DESAI SETHI
UROLOGY INSTITUTE

What We're Building

A signature thought leadership report aimed at amplifying Desai Sethi Urology Institute's (DSUI) positioning as a global leader in urology and driving force behind uncovering thoughts and opinions related to the field of urology.

The State of Urology report will further build awareness and recognition of the Desai Sethi Urology Institute amongst its peers and media, while providing insights on a range of timely, relevant and newsworthy topics.

It is meant to be an annual initiative that gives the Institute a platform to amplify thought-leadership going into its annual conference. Findings from 2023 are to serve as a baseline to gauge future progress in the field.

What We Did

Urologist Survey

Sample Size: 70

- Survey participants represented: general urology, urologic oncology, female urology, and pediatric urology.
- Practice settings included: hospitals, academic medical centers, academic/teaching environments within a hospital, private practice, multispecialty practice, and solo practice.

Online survey fieldwork dates:

- October 16th - November 21st 2023

General Public Survey

Sample Size: 2,425

- Nationally representative sample of U.S. adults 18+.

Online survey fieldwork dates:

- November 16th - November 20th 2023

KEY INSIGHTS & COMMUNICATION THEMES

3 Steps to Transforming Urology

1

Cross Disciplinary Collaboration Fills an Important Need

A collaborative environment that integrates different medical specialties can offer a more holistic approach to urology, addressing complex medical cases more effectively, addressing patient's desire for better outcomes and even helping attract more diverse talent.

2

Embracing Emerging Technologies for Better Care

Urologists say that emerging technologies will have the largest impact on the field over the next three years and are rapidly incorporating them into their work, but lack of funding, training and infrastructure are inhibiting progress with AI.

3

Strengthening the Physician-Patient Connection

Improving communication and understanding between doctors and patients is crucial. Barriers to care remain pronounced with patients not seeking out care despite symptoms.

SUPPORTING FINDINGS

Multidisciplinary
teams are essential
to advancing the
field

Among all factors impacting the field, urologists feel passionately that cross-disciplinary collaboration is most critical

Urologist Survey: Perceptions on the field of urology today

Collaboration with other medical specialties is critical to address complex urological cases effectively	93%
The field of urology needs to adapt to the needs of the aging population	84%
Increased use cases of telemedicine have made urology more accessible to underserved populations	81%
Personalized medicine is revolutionizing the way urologists diagnose and treat patients	76%

Q1: To what extent do you agree or disagree with the following statements about the field of urology today? % Shown: Agree/Strongly Agree
Base: Total Urologists n=70.

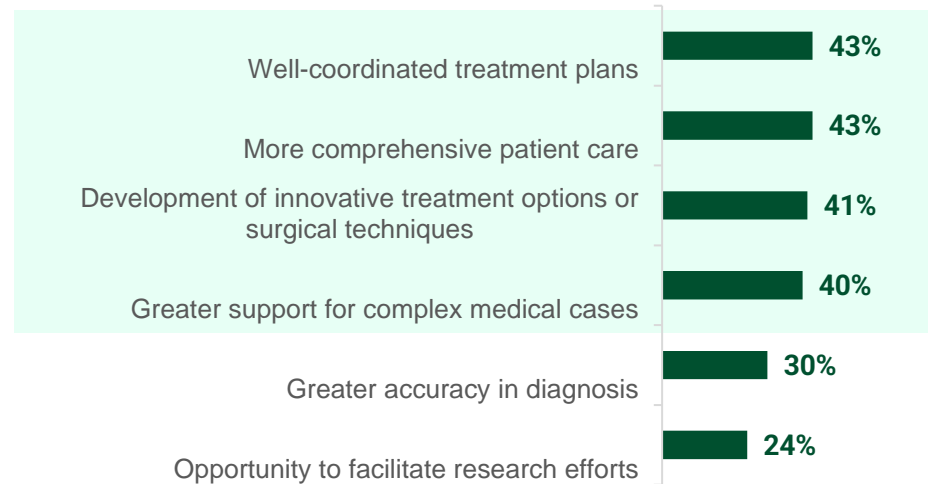
Cross-disciplinary collaboration drives innovative treatments and leads to more well-coordinated and comprehensive care

Urologist Survey: Importance of cross-disciplinary collaboration

87%

agree cross-disciplinary collaboration in the discovery of new treatments or therapies in urology is **very important/essential**

Urologist Survey: Biggest benefits of interdisciplinary care



Q15: In your opinion, how important is cross-disciplinary collaboration in the discovery of new treatments or therapies in the field or urology? % Shown: Very Important/Essential

Q16: Which of the following do you consider to be the biggest benefits of interdisciplinary care? % Shown: % Selected

Base: Total Urologists n=70.

Urologists report frequent collaboration with a small number of disciplines outside of urology

Urologist Survey: Frequency of collaboration with other fields

Radiology **91%**

Reproductive Medicine **56%**

Nephrology **50%**

Bioethics **50%**

Oncology **41%**

Genomics **13%**

Public Health **4%**

Geriatrics **3%**

Immunology **3%**

Engineering **3%**

Bioinformatics **3%**

Neurology **1%**

Q17: In your work, how often do you collaborate with the following disciplines or fields? % Shown: Often/Always
Base: Total Urologists n=70.

Interdisciplinary care addresses a top challenge of attracting and collaborating with diverse talent

Urologist Survey: Current challenges in professional work

74%

Say attracting diverse talent is **challenging** to them in their professional work currently

Urologist Survey: Biggest benefits of interdisciplinary care

and 1 in 5

(19%) say the ability to work with the best talent regardless of specialty or attracting a diverse workforce is a benefit of interdisciplinary care

Q4: How challenging are each of the following to you currently in your professional work? % Shown: % somewhat or extremely challenging

Q16: Which of the following do you consider to be the biggest benefits of interdisciplinary care? % Shown: % Selected

Base: Total Urologists n=70.

Emerging
technologies will have the
largest impact on urology
over the next 3-5 years

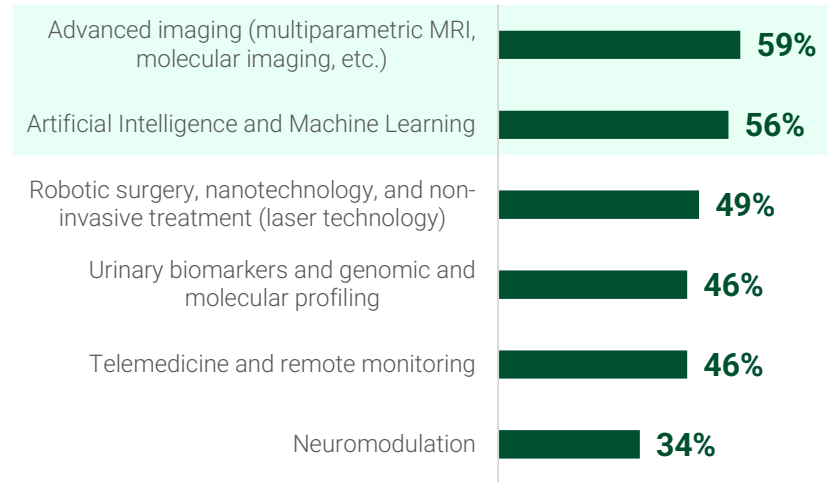
Advanced imaging and AI expected to have the greatest impact on the field of urology

Urologist Survey: Biggest impact in the field of urology in the next three to five years

47%

Development of new technologies

Urologist Survey: Specific technologies that will have the biggest impact on urology in the next three to five



Q8: Which of the following technologies do you believe will have the biggest impact in the field of urology in the next three to five years? % Shown: % Ranked within top 3

Q2: Now we'd like you to think about the future of the field. Which of the following do you believe will have the biggest impact in the field of urology in the next three to five years? % Shown: % Ranked within top 3

Base: Total Urologists n=70.

While advanced imagining is used regularly now, there will be a significant increase in usage of AI in the next three years

Urologist Survey: Technologies currently implemented, or working to be implemented

	Regularly implement	Implement in the next three years
Advanced imaging (multiparametric MRI, molecular imaging, etc.)	87%	5%
Telemedicine and remote monitoring	42%	5%
Robotic surgery, nanotechnology, and non-invasive treatment (laser technology)	33%	63%
Urinary biomarkers and genomic and molecular profiling	25%	60%
Neuromodulation	12%	45%
Artificial Intelligence and Machine Learning	0%	87%

Q10: Which of the following technologies, if any, do you currently implement, or are working to implement into your professional work? % Shown: % Selected "Regularly implement into my work" and "Expect to implement in the next three years"

Base: Total Urologists n=70.

Yet, key barriers to deploying new technologies stand in the way

Urologist Survey: Top barriers to implementing new technologies in the field of urology

49%

Lack of funding to implement new technologies

41%

Lack of training to implement new technologies

37%

Lack of infrastructure to support new technology

Q12: Which of the following are significant barriers to implementing new technologies in your work? % Shown: % Selected
Base: Total Urologists n=70.

Urologists and the public agree emerging technology will help with earlier detection and improved outcomes and diagnosis

Urologist Survey: Most important patient benefits resulting from emerging technology in urological care

Improved health outcomes **41%**

Early detection and prevention **40%**

Improved accuracy of diagnostics and treatment plans **34%**

Greater convenience through telemedicine or remote monitoring capabilities **27%**

Shorter recovery times after surgical or other invasive procedures **23%**

Consumer Survey: Most important benefits of technology when seeking urological care

Early detection and prevention of conditions **39%**

Reduced need for invasive or painful procedures **31%**

Improved health outcomes **31%**

Reduced healthcare costs **24%**

Improved accuracy of diagnostics and treatment plans **23%**

Minimized discomfort during testing or treatments **23%**

Q14. Which of the following do you consider to be the most important patient benefits that will result from emerging technology in urological care? % Shown: % Selected. Base: Total Urologists n=70.
Consumer_Q11. There are several breakthroughs and innovations in the field of urology that provide various benefits to patients... Which THREE of the following benefits would be the most important to you if you needed urological care? % Shown: % Selected. Base: Total US Adults n=2425

Patient education is
needed to change
perceptions and reduce
barriers to care

Nearly half of U.S. adults say urology is important in supporting their health

Consumer Survey: Importance of healthcare specialties in supporting or maintaining personal health

48%

of US adults say **urology** is important in supporting or maintaining their personal health at this point their life

Ophthalmology	67%	Endocrinology	50%
Gastroenterology	53%	Psychiatry	49%
Cardiology	60%	Gynecology	47%
Dermatology	50%		

Consumer_Q3: Generally, how important, if at all, do you think each of the following healthcare specialties are in supporting or maintaining your personal overall health right now at this point in your life? Please select the option that best applies on each row. % Shown: % selected Somewhat/Very Important.

Base: Total US Adults n=2425

But misconceptions about urological care are prominent

Consumer Survey: Consumer perceptions on urology and urological care

Seeing a urologist is not necessary unless one is experiencing symptoms	49%	Urologists mostly specialize in treating prostate-related conditions	28%
I would try to avoid seeing a urologist unless I absolutely had to	45%	I am more uncomfortable seeing a urologist than I am seeing other types of doctors	25%
Routine urological check-ups are not necessary unless diagnosed with a urological condition	42%	Only older people need to see a urologist	20%
A visit to the urologist often involves uncomfortable, embarrassing or invasive procedures	37%		

Consumer_Q10: How much do you agree or disagree with each of the following statements about urology and urological care? Please select the option that best applies on each row. % Shown: Agree/Strongly Agree. Base: Total US Adults n=2425.

Nearly two-thirds of adults have never seen a urologist; almost a quarter of those with urological symptoms have not sought care

Consumer Survey: US adults who've not seen a urologist for any reason

65%

of US adults have not seen a urologist

Consumer Survey: US adults who've had symptoms and not seen a urologist

23%

of US adults have not sought treatment from a urologist despite urological symptoms

Consumer_Q5. Have you ever seen a urologist either for preventative care or to treat a specific urological condition such as kidney stones, erectile dysfunction, urinary problems or prostate issues, etc.? Please select all that apply. % Shown: % Selected
Consumer_Q6. Have you ever had symptoms of a potential urological condition such as kidney stones, erectile dysfunction, urinary problems or prostate issues, etc. and not sought treatment from a urologist? % Shown: % Yes
Base: Total US Adults n=2425

Urologists feel lack of understanding about symptoms and treatments are top barriers to care

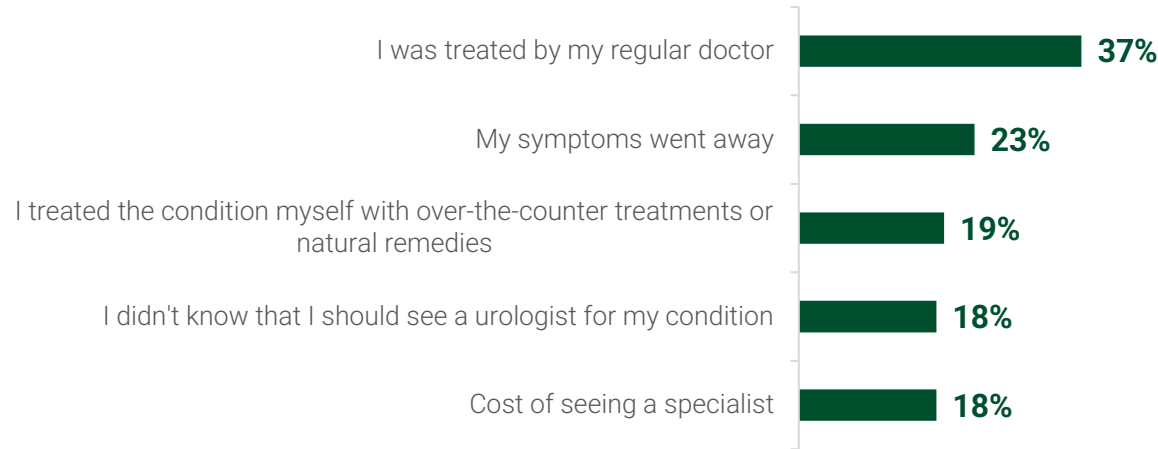
Urologist Survey: Why patients don't seek urological care according to urologists

Inability to identify their symptoms or unaware if their condition warrants medical attention	54%
Misinformation or misconceptions about conditions or treatment options	50%
Underestimating severity of symptoms or condition, (i.e. they consider it a normal part of aging)	49%
Embarrassment discussing urological conditions with healthcare providers	44%
Healthcare costs and concerns over insurance coverage	44%

Q5. In your experience, which of the following are the main reasons why patients don't seek urological care? % Shown: % Selected.
Base: Total Urologists n=70

Adults with symptoms did not seek urological care because they were treated by their regular doctor, or their symptoms abated

Consumer Survey: Common reasons why urological treatment was not sought despite potential conditions



Consumer_Q7. You mentioned that you have had symptoms of a potential urological condition and did not seek treatment from a urologist. Which of the following are reasons why? Please select all that apply. % Shown: % Selected among those who previously indicated a potential urological condition, but did not seek urological care.

Base: n=565

Steps to transforming the future of urology

THOUGHT
STARTERS FOR
DSUI TO
INCORPORATE
THEIR POV

1

Drive multidisciplinary collaboration

A collaborative environment that integrates different medical specialties can offer a more effective and holistic approach to urology, improving outcomes and fostering a diverse workforce.

2

Maximize technology adoption to fuel innovation

Successfully incorporating emerging technologies will be key to advancements in treatments over the next 5 years. Addressing barriers to implementation should be a focus.

3

Connect with patients

Improving communication and understanding between doctors and patients is crucial to changing perceptions of urology and reducing barriers to care.

4

Collaborate with general practitioners

General practitioners are a gateway for consumers and greatly influence whether patients seek urological care. Ensure general practitioners are facilitating appropriate patient referrals.

Potential Headlines

Urologists Rank AI as Key to Transforming Tomorrow's Therapies in New Desai Sethi Urology Institute Survey

State of Urology Survey: Nearly a Quarter of Adults Delay Urological Care Despite Experiencing Symptoms

Desai Sethi Urology Institute Survey: Cross-Disciplinary Work Essential to New Urology Treatments, Say 87% of Specialists

DSUI Advocates for Enhanced Patient Education to Break Down Urological Care Barriers

Is a Visit to the Urologist's Office on Your List Of New Year's Resolutions? A New Survey Suggests You Should Consider It.

New Survey Hints at AI's Potential to Improve Even Your Future Visits to the Urologist

Discussion & Next Steps