



DESAI SETHI
UROLOGY INSTITUTE

THE STATE OF UROLOGY

Capturing Transformation, Challenges and Opportunities in the Field of Urology

January 2024

The inaugural Desai Sethi Urology Institute (DSUI) State of Urology Survey & Report takes the pulse of urologists and the general public in order to understand what issues are shaping our field and to establish benchmarks to gauge our future progress.

“I think that we are in an exciting time in medicine in general and in Urology specifically. I expect urologic practice to look very different 5 and 10 years into the future.” – Urologist Survey Participant

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- The impact of emerging technologies 11
- The need for patient education 16

OVERVIEW

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

- Survey participants were U.S. adults (aged 18+).
- Results have been weighted and are demographically representative of the U.S. adult population.

Online survey fieldwork dates:

- November 16th - November 20th 2023

EXECUTIVE SUMMARY

Our survey explored the most pressing challenges and promising opportunities facing urology, and identified three key themes that urologists feel will shape the future of the field.

KEY FINDINGS

Multidisciplinary teams are essential to advancing the field

93% of urologists agree collaboration with other medical specialties is critical to address complex urological cases effectively

87% of urologists agree cross-disciplinary collaboration is vital in the discovery of new treatments or therapies in urology

19% of urologists say that interdisciplinary care offers the ability to work with the best talent regardless of specialty and attracts a diverse workforce

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

47% of urologists say the development of new technologies will have the biggest impact on the field in upcoming years

50% of urologists find it challenging to implement new technology

87% of urologists plan to implement artificial Intelligence and machine learning into their work in the next 3 years

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

23% of adults have experienced symptoms of a potential urological condition and did not seek treatment from a urologist

42% of adults feel routine urological check-ups are not necessary unless diagnosed with a urological condition

37% of adults feel seeing a urologist involves uncomfortable, embarrassing or invasive procedures

DETAILED FINDINGS



Multidisciplinary teams are essential
to advancing the field

AMONG MANY FACTORS IMPACTING THE FIELD, UROLOGISTS FEEL PASSIONATELY THAT CROSS-DISCIPLINARY COLLABORATION IS AMONG THE 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.

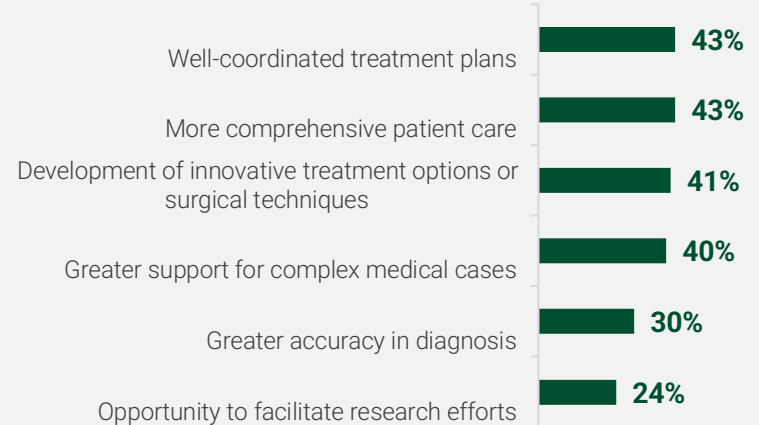
CROSS-DISCIPLINARY COLLABORATION DRIVES INNOVATIVE TREATMENTS AND LEADS TO MORE WELL-COORDINATED AND COMPREHENSIVE CARE

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

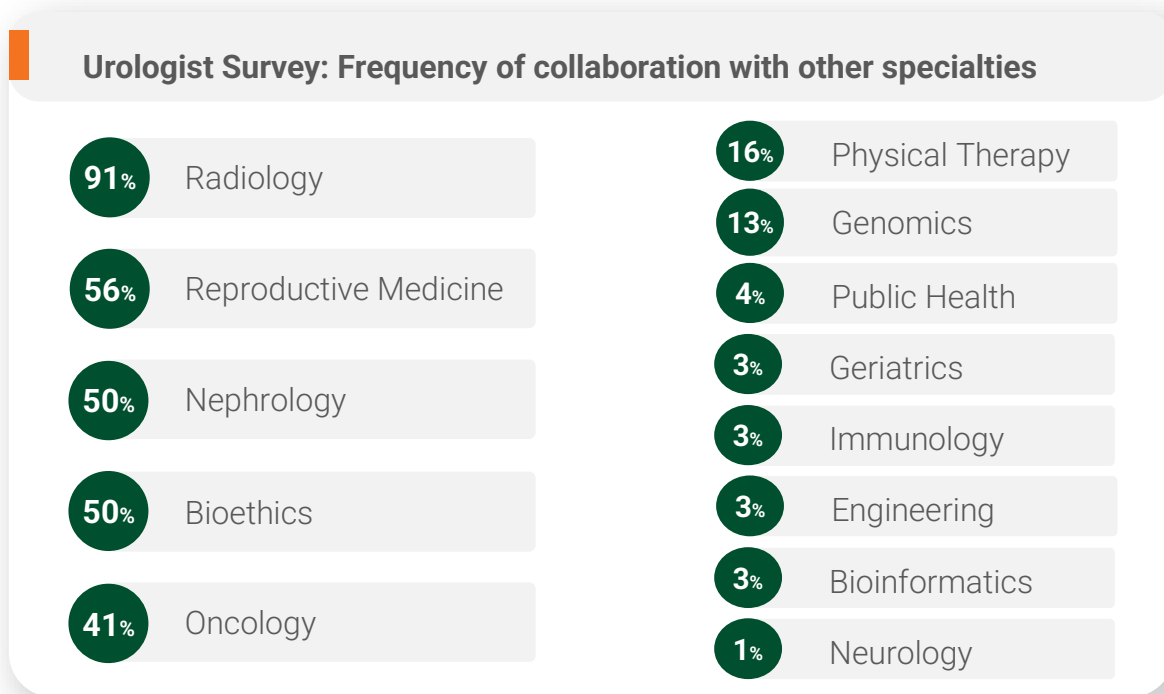


Q15: In your opinion, how important is cross-disciplinary collaboration in the discovery of new treatments or therapies in the field or urology? % Shown: Very Important/Essential

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



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 and 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 5 years

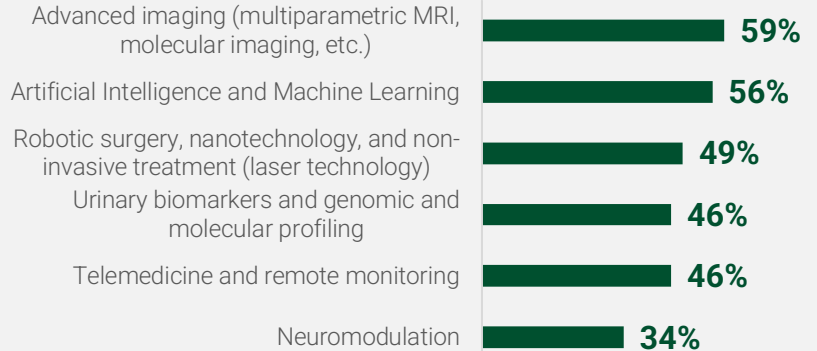
ADVANCED IMAGING AND AI ARE EXPECTED TO HAVE THE GREATEST IMPACT ON THE FIELD OF UROLOGY

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 IS EXPECTED 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 challenges in the field of urology

50% of Urologists find it challenging to implement new technology

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

Q4: How challenging are each of the following to you currently in your professional work? % Shown: % Selected
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 TECHNOLOGY WILL AID EARLIER DETECTION, IMPROVED OUTCOMES AND DIAGNOSIS, AS WELL AS LESS INVASIVE PROCEDURES


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

| | |
|--|-----|
| Improved health outcomes | 41% |
| Early detection and prevention of conditions | 40% |
| Improved accuracy of diagnostics and treatment plans | 34% |
| Greater convenience through telemedicine or remote monitoring capabilities | 27% |
| Reduced need for invasive or painful procedures | 23% |
| 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=2,425



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

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=2,425

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

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=2,425.

NEARLY TWO-THIRDS OF ADULTS HAVE NEVER SEEN A UROLOGIST, WHILE ALMOST A QUARTER OF THOSE WHO HAVE EXPERIENCED POTENTIAL 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 potential symptoms and not seen a urologist

23%

of US adults have not sought treatment from a urologist despite experiencing potential 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=2,425

UROLOGISTS FEEL LACK OF UNDERSTANDING ABOUT SYMPTOMS AND TREATMENTS ARE TOP BARRIERS TO CARE

Urologist Survey: Top reasons 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

01

Prioritize Multidisciplinary Collaboration

Urologists and health systems/hospitals equipped with urology departments should actively seek to attract exceptional medical professionals from diverse fields such as biomedical engineering, oncology, radiology, and translational research and disciplines. This deliberate effort to assemble a team of diverse specialists will cultivate synergies, fostering collaboration that is poised to significantly elevate patient outcomes.

02

Leverage Technology Excellence

Through an expanded recruitment strategy targeting top-tier national talent in urology, urologists and hospitals/health systems with urology departments should aim to fortify their capability to overcome obstacles in the adoption of cutting-edge technologies. This initiative can position urologists to effectively address and navigate challenges, ensuring that they remain at the forefront of technological advancements in the field.

03

Bridge Patient- Urologist Perspectives

Closing the gap between patient and urologist priorities in urological care is essential. While both emphasize early detection and prevention, patients prioritize minimizing invasive procedures and discomfort more than urologists. To enhance patient connection, urologists should actively address patient needs, even if divergent from their own.

04

Foster Collaboration with General Practitioners

Recognizing the vital role of primary care providers (PCPs), our emphasis on collaboration extends beyond specialists to include these frontline healthcare professionals. Partnering with PCPs is paramount to ensuring patients receive timely and targeted care from the appropriate specialists, underscoring our commitment to comprehensive and efficient healthcare delivery.

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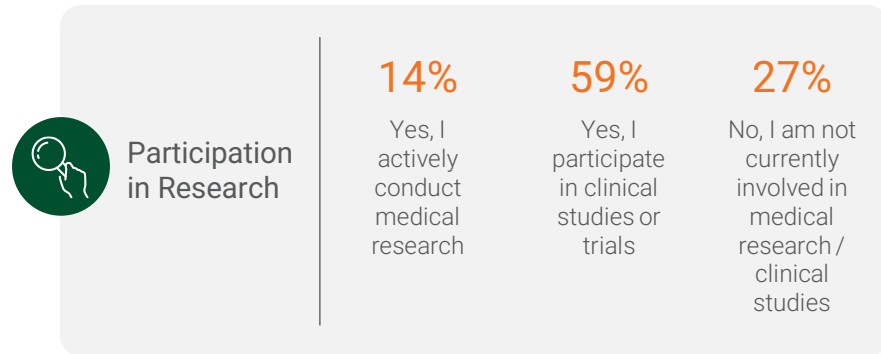
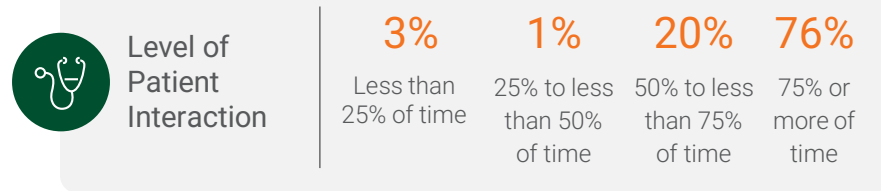
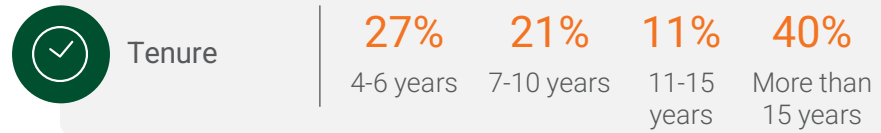
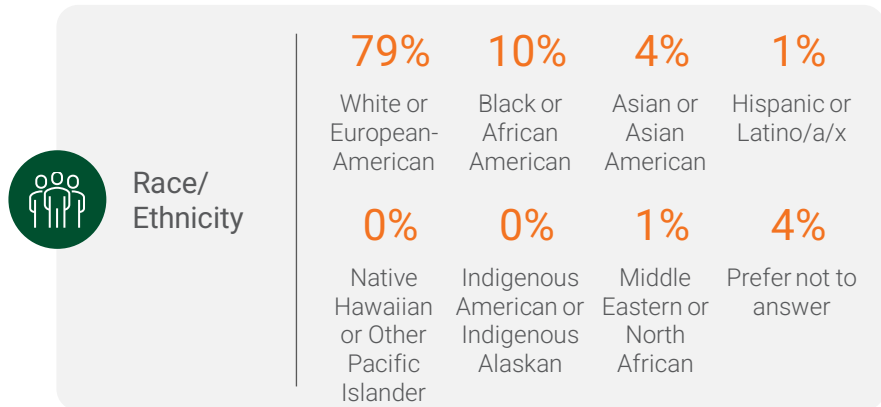
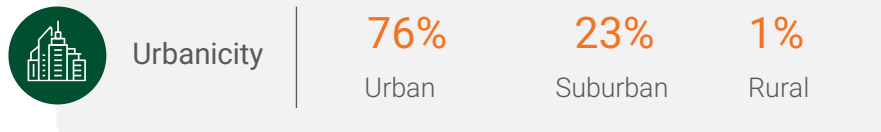
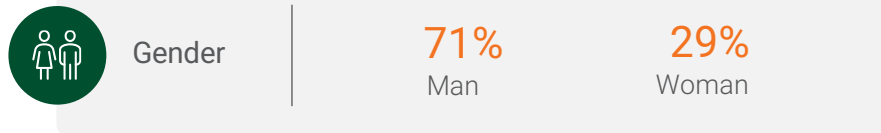
 **UHealth**
UNIVERSITY OF MIAMI HEALTH SYSTEM

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APPENDIX

UROLOGIST DEMOGRAPHICS

Figures rounded to the nearest whole number



UROLOGIST DEMOGRAPHICS (CONT'D)

Figures rounded to the nearest whole number

Subspecialty

64%

General urology

17%

Urologic oncology

11%

Female urology

3%

Pediatric urology

1%

Endourology

1%

Stone disease

Practice Setting

30%

Hospital

29%

Academic medical center

23%

Academic or teaching environment within a hospital

7%

Private practice

7%

Multispecialty practice

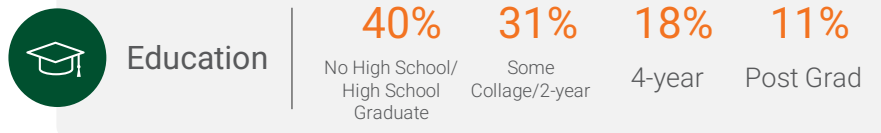
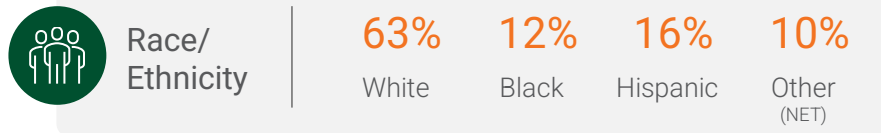
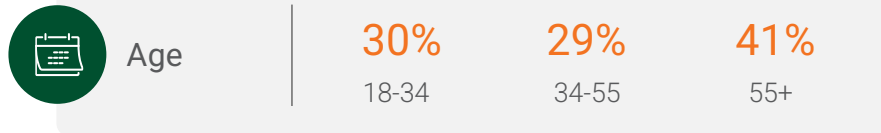
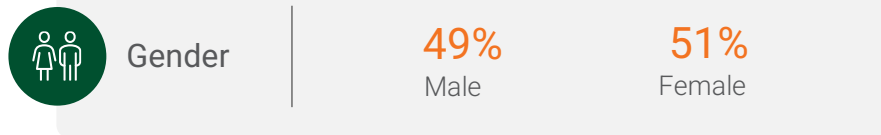
3%

Solo practice

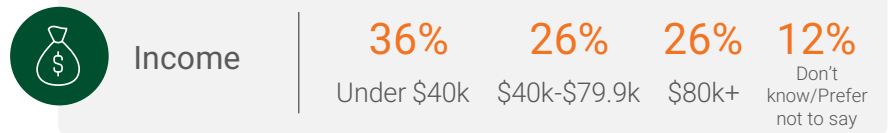
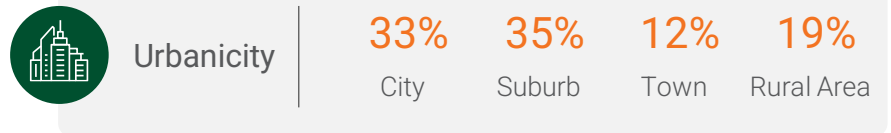
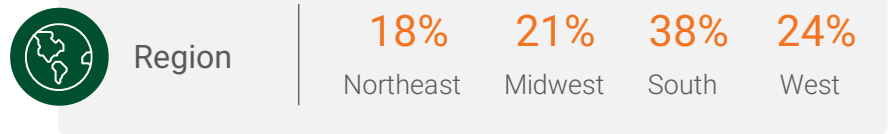
1%

Other

CONSUMER DEMOGRAPHICS



Figures rounded to the nearest whole number





THANK YOU