

SONY



U.S. consumer attitudes towards specialized remote health monitoring devices

An analysis of the rate of adoption and interest in remote health monitoring technology aimed at helping people manage chronic conditions.

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mSafety

Could specialized remote health monitoring devices help people manage their chronic conditions better?

Chronic conditions cost the U.S. healthcare system \$3.1 trillion dollars in 2019¹ and the burden of ongoing treatment and compliance impacts patients and providers alike.

Between May 29 and June 2, 2020, a survey was carried out in an effort to better understand the U.S. consumer's rate of adoption and interest in remote health monitoring technology targeted towards people living with a chronic condition² - or caring for someone else with a chronic condition.

The following report is a compilation of insights, based on data gathered and analyzed from 2,005 people managing chronic conditions in the U.S. It shows that U.S. consumers are keen to adopt specialized remote health monitoring devices, and that dedicated wearables – like the mSafety™ device – have the potential to reduce the need for costly acute interventions, as well as aligning neatly with the proactive, personalized care models of the future.

Here, we present the key figures and take-outs from the study.

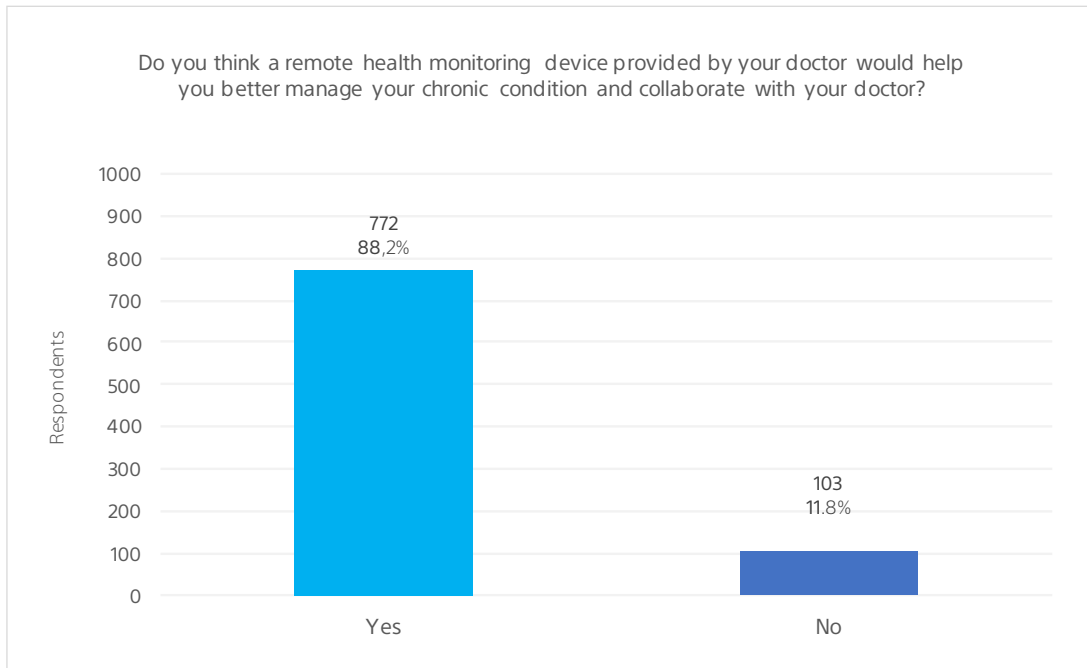
This study was conducted on behalf of the Wearable Platform Division at Sony Network Communications and carried out by independent brand intelligence firm Survata, analyzing data from 2,005 consumers between May 29 and June 2, 2020.

¹ CDC. GOV <https://www.cdc.gov/chronicdisease/about/costs/index.htm#ref1>, Accessed May 13, 2020.

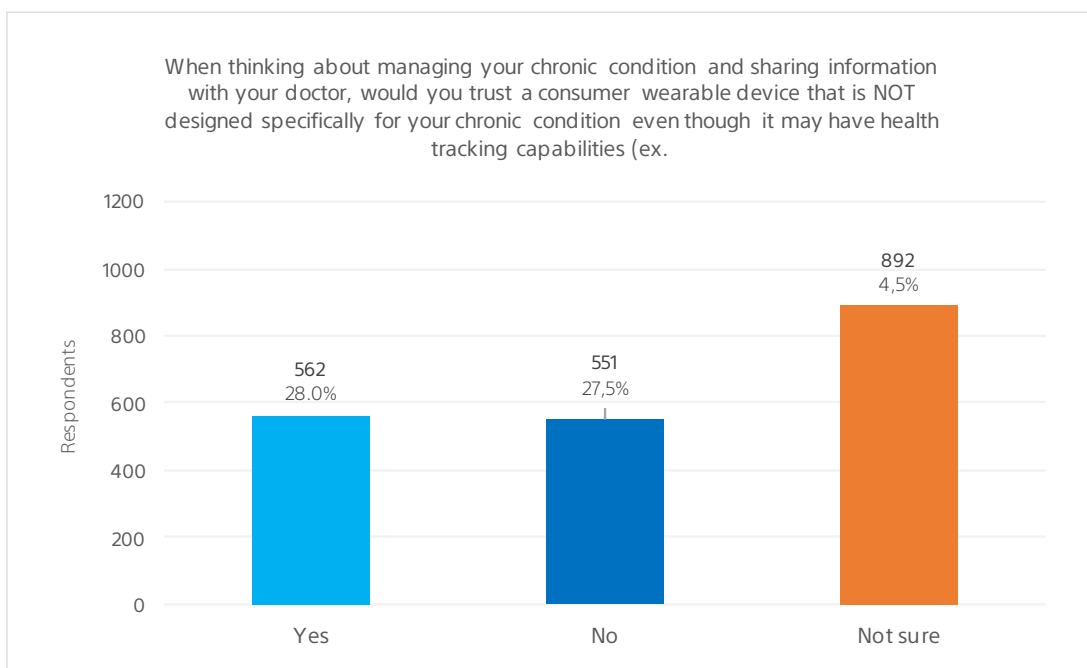
² Chronic conditions include e.g. diabetes, heart disease, hypertension, COPD, asthma, arthritis, obesity, etc.

Consumers have an appetite for remote monitoring technology that is specifically designed to help manage chronic health conditions

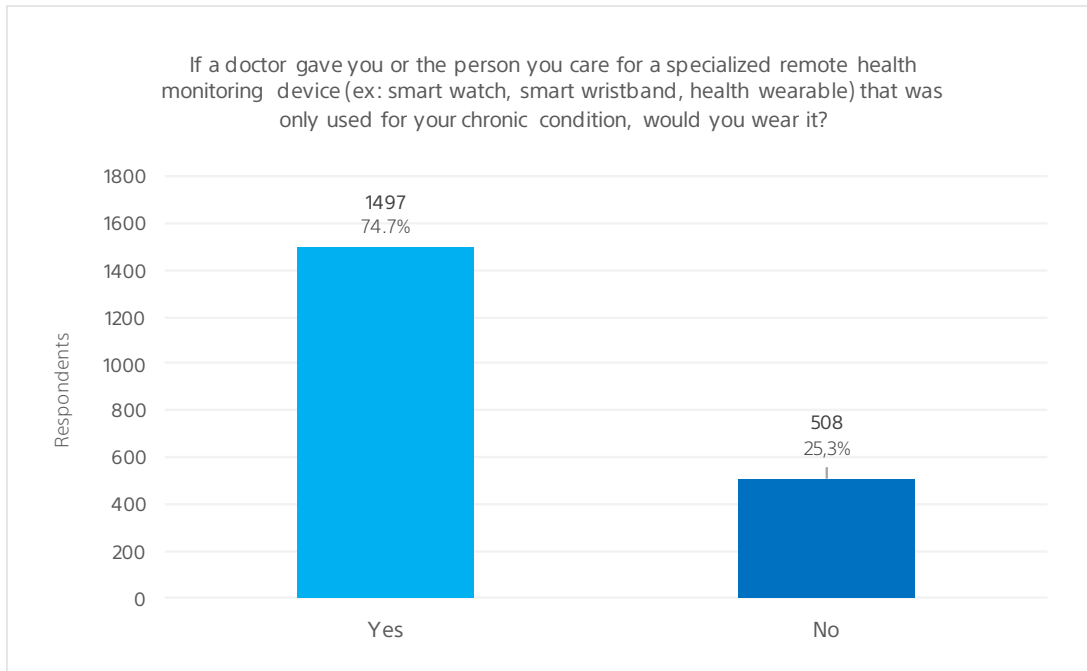
88% of people managing a chronic condition or caring for someone else with a chronic condition believe they would be able to manage it better with the help of a specialized remote health monitoring device.



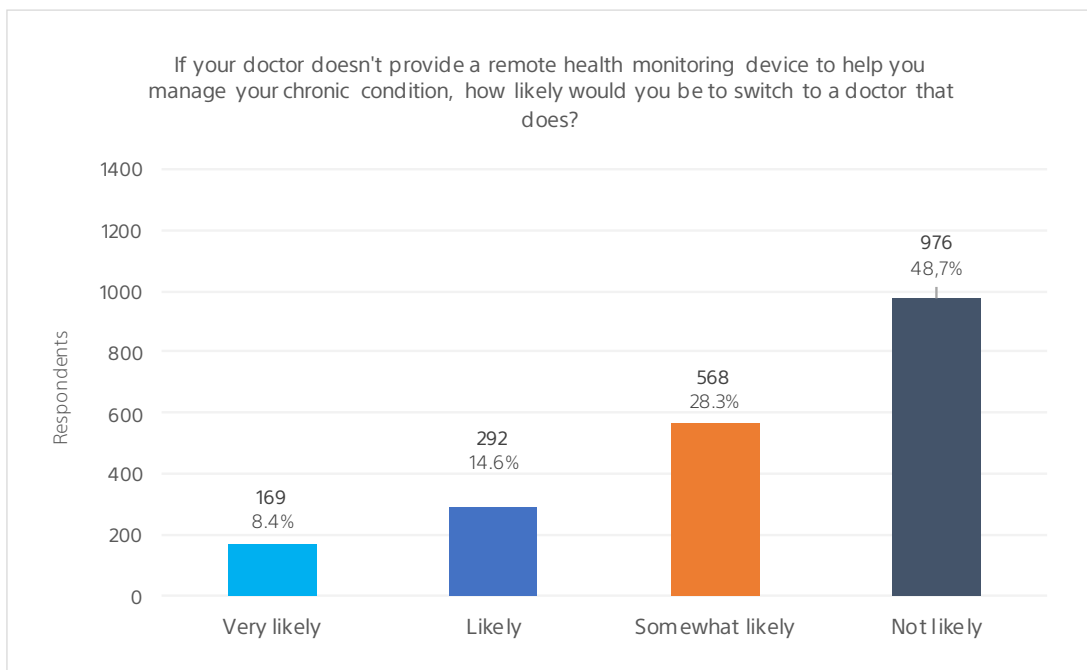
However, only 28% would trust a consumer health wearable device to manage their chronic condition, illustrating the need for more healthcare-specific remote monitoring devices.



While some have questioned whether consumers would be willing to wear a specialized device specifically for a chronic condition, the study found that 75% would be willing to do so, provided the device was offered by their doctor.

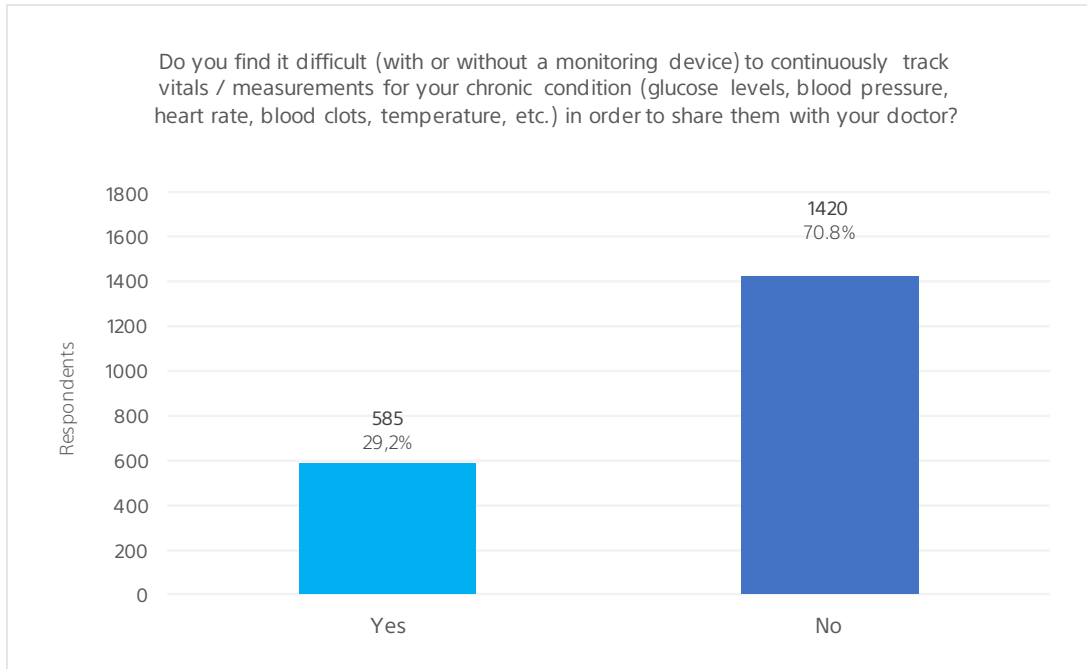


Over 50 percent of those surveyed said they would go so far as to consider switching doctors if their own doctor didn't provide a specialized remote health monitoring device.

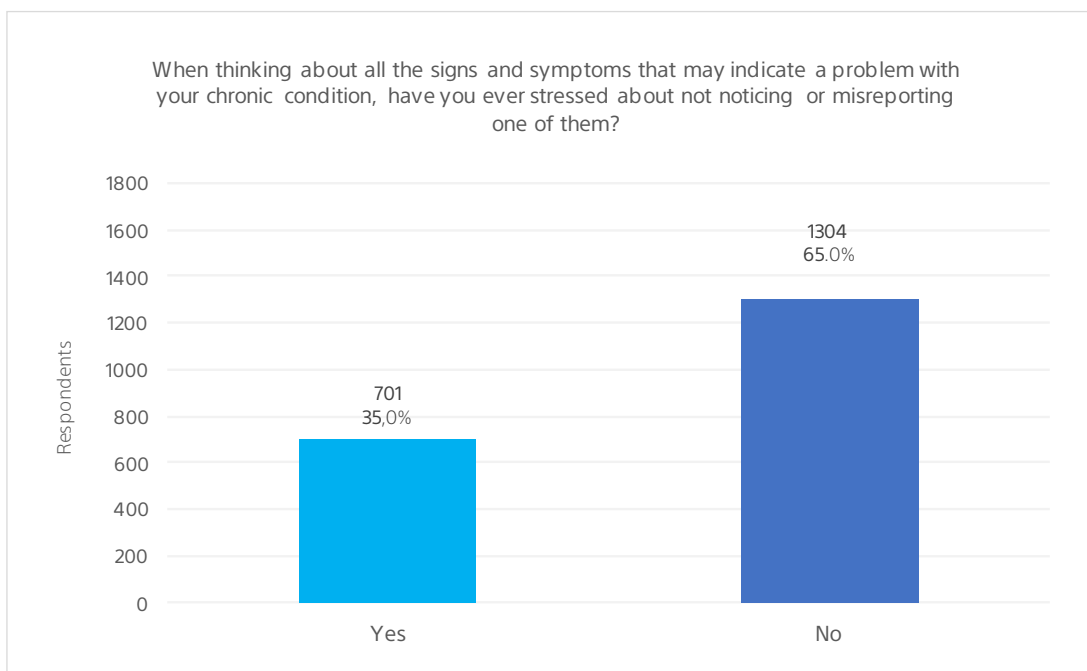


Many struggle to manage their chronic conditions

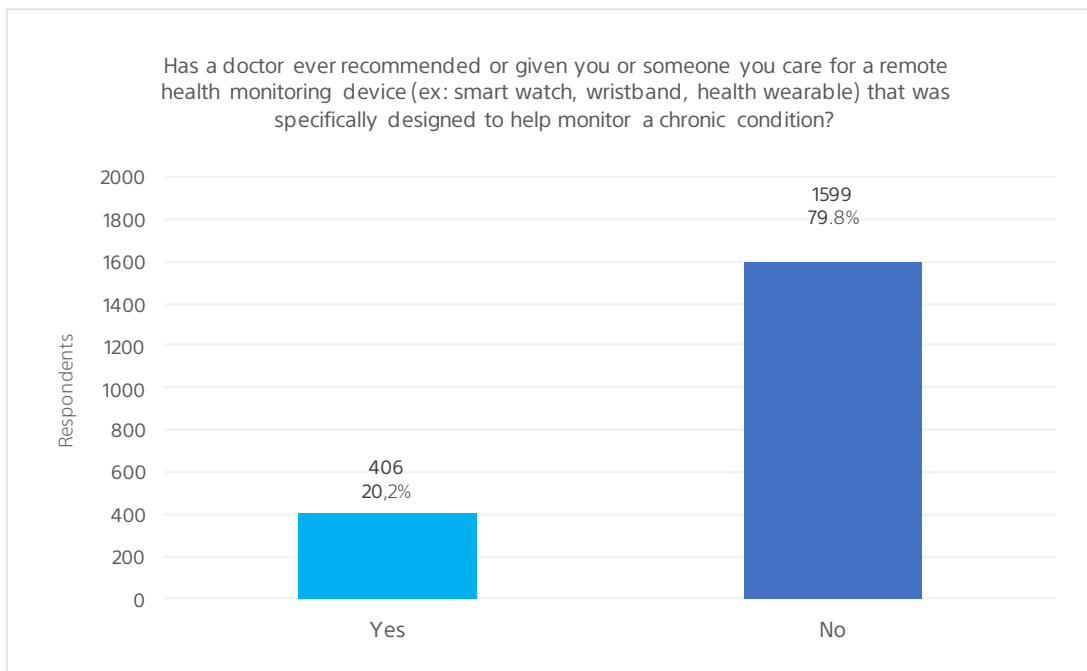
The study found that managing chronic conditions remains “stressful” and “difficult” for many. Three in ten of the people surveyed said they continuously had difficulty tracking vitals and other important measurements.



And even more - 35 percent - said they were stressed about keeping up with or misreporting their vitals.



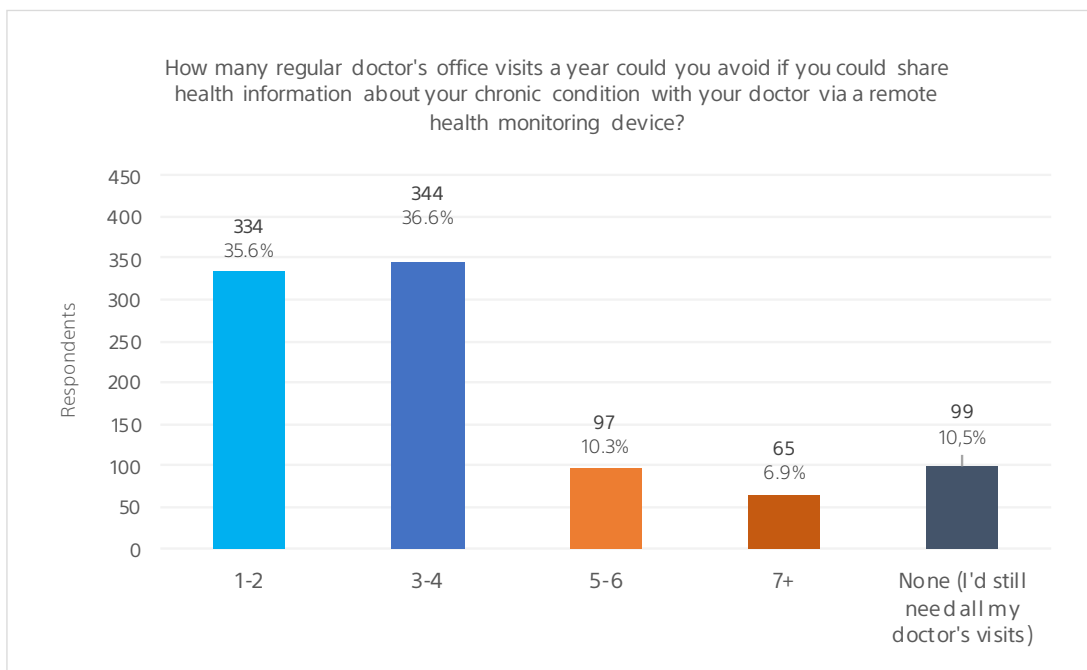
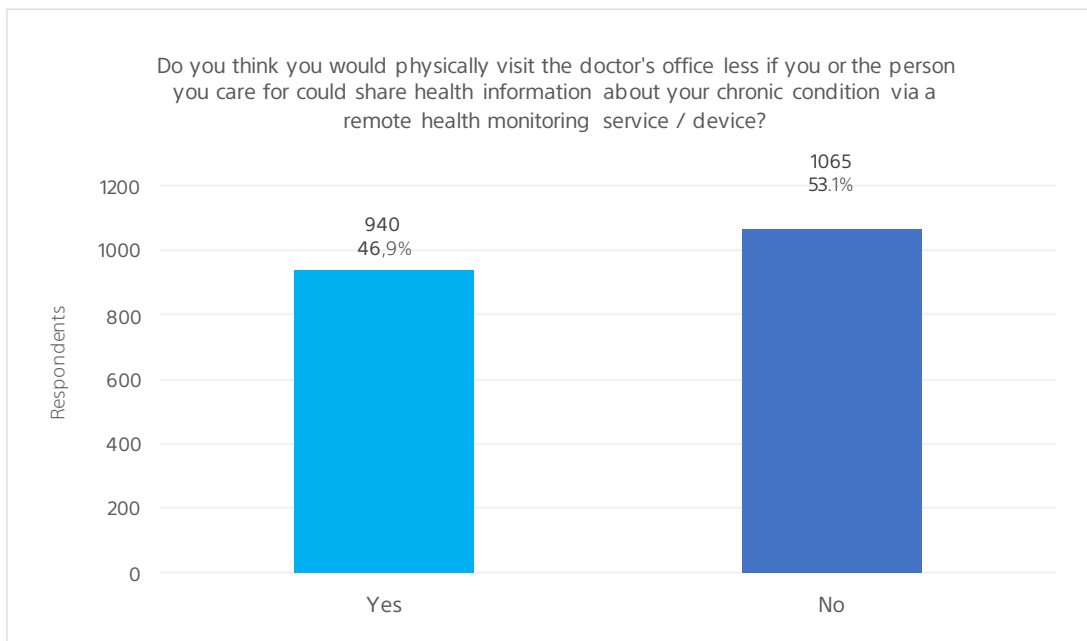
Despite the availability of remote monitoring technology, to date only 20% of the people surveyed have been prescribed a specialized wearable to monitor their condition by their doctor.



Remote health monitoring devices have the potential to reduce patient burdens and healthcare costs

Visiting the doctor for routine tests and personal health data gathering is both time-consuming and expensive for patients with chronic conditions. With access to reliable remote health monitoring technology, this reliance on traditional fee-for-service care models could be significantly reduced.

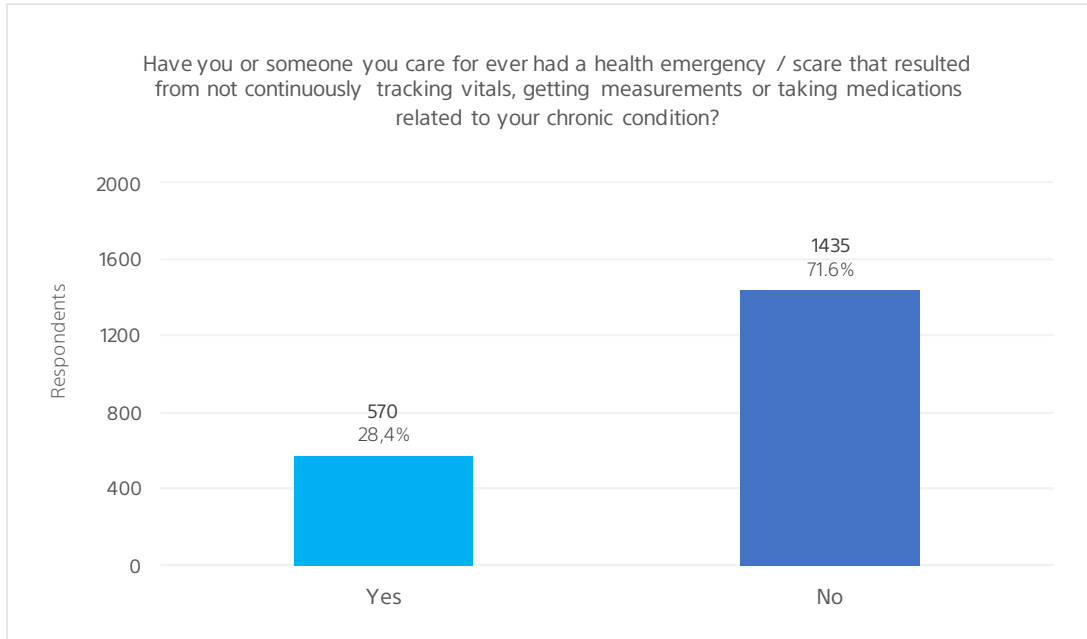
The study found that almost 50 percent of survey respondents would visit their doctors less often if they had the means to share health data digitally, and 64 percent would cut out three or more annual visits.



Additional findings from the study reinforce the benefits of broader adoption of remote health monitoring devices

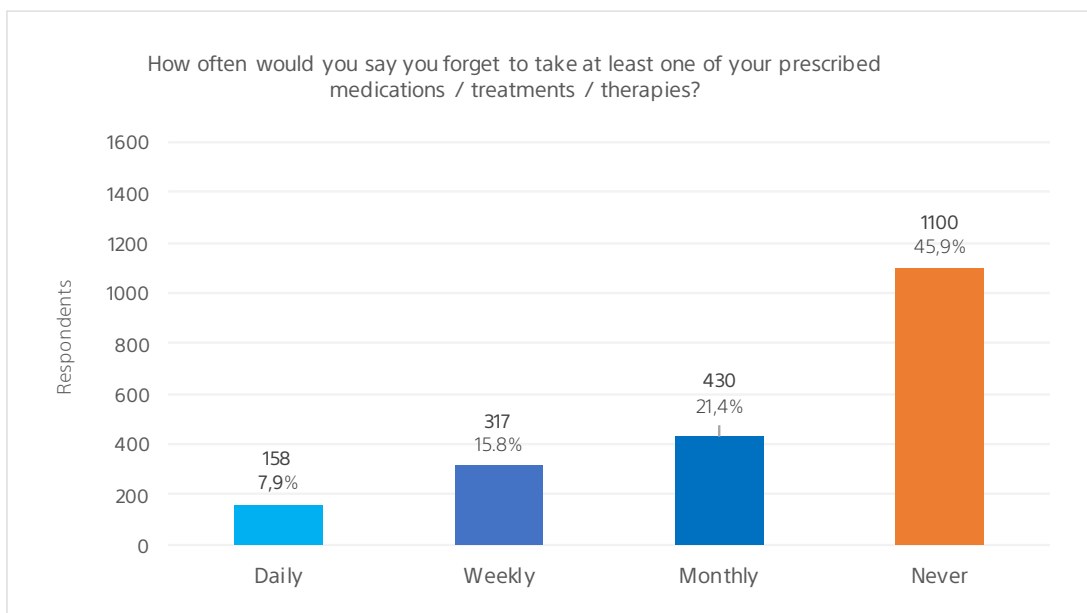
Reduction in potential health emergencies

Approximately one-out-of-every-four (28 percent) people managing chronic conditions has had a health emergency because of not continuously tracking their measurements or medications.



Improved medical adherence

45 percent of people managing chronic conditions regularly forget to take one of their prescription medications / treatments.



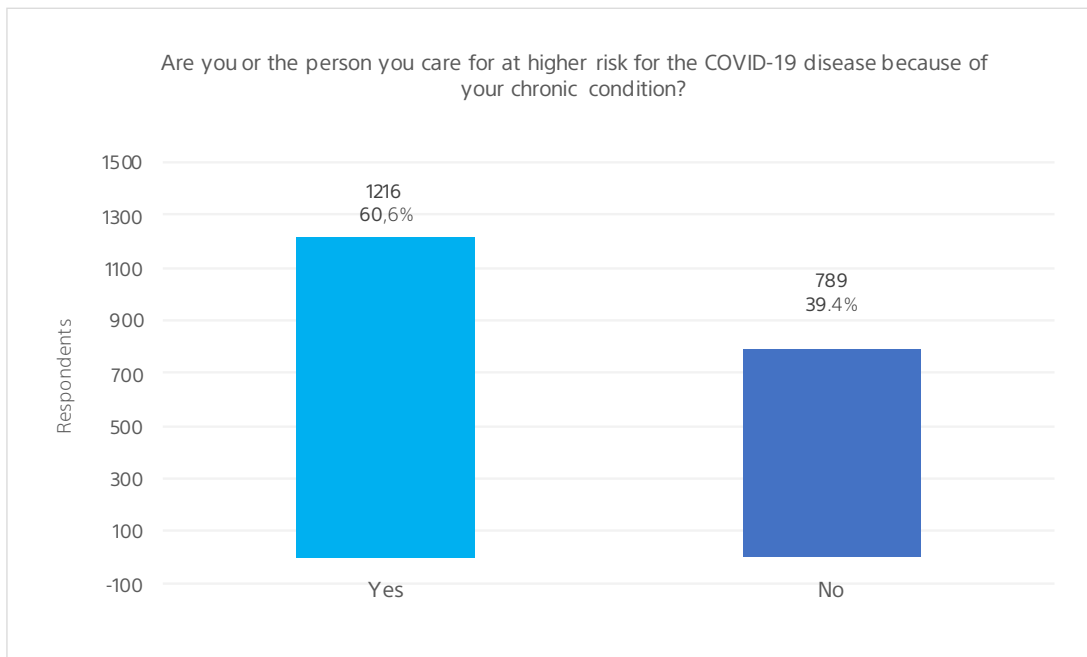
Feeling better informed, safer and more confident

How would consumers feel with specialized remote health monitoring devices? (Multiple answers possible)

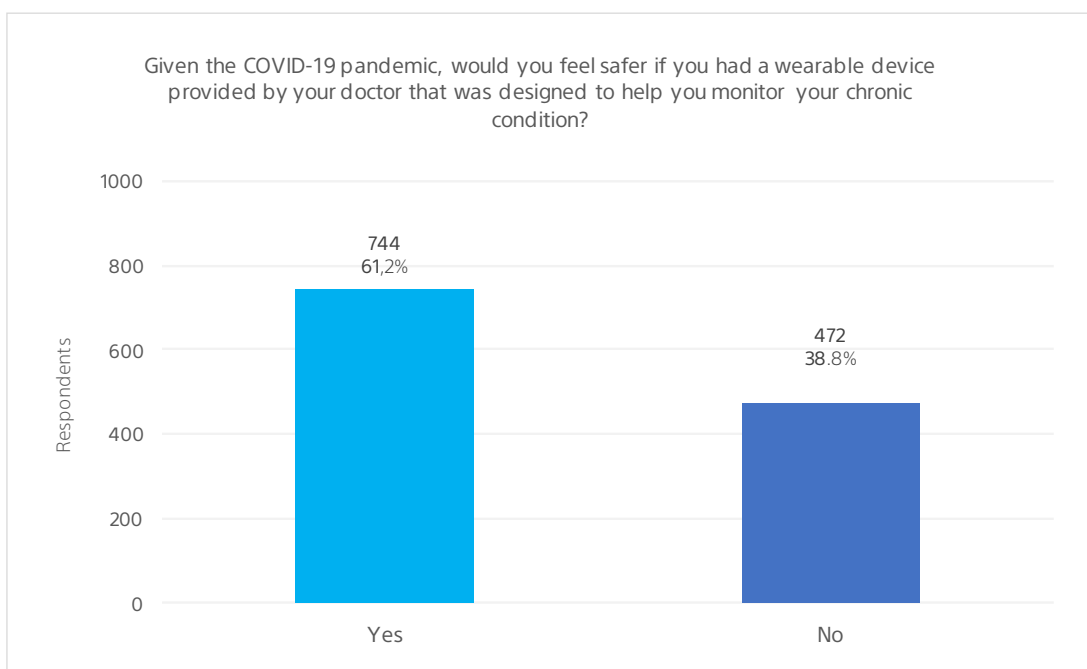
- 63%** Better informed
- 41%** Safer
- 38%** More confident
- 35%** More protected

Chronic conditions in times of COVID-19 pandemic

60 percent of people asked feel that they or the people they care for are at higher risk for the COVID-19 disease because of their chronic condition.



61 percent of people with chronic conditions would feel safer if they had a wearable device provided by their doctor.



mSafety

mSafety is a remote monitoring platform consisting of a connected wearable device and a secure backend solution. It provides Sony's B2B partners with a reliable, ready-made basis upon which to develop and scale their own unique, mobile health applications or remote health monitoring solutions to support patients and caregivers managing chronic conditions.

Want to know more?

Contact us on msafety@sony.com and find out how mSafety can add value to your organization.

<https://iot.sonymnetworkcom.com/msafety/>

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