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FROM HEALTHCARE TO HOMECARE

An Ericsson Consumer and Industry Insight Report
June 2017



METHODOLOGY



Qualitative research:

Two consumer focus group discussions, in-depth interviews with 6 post-operative care patients and 17 industry decision makers
Markets: Japan, South Korea, UK and US



Quantitative research:

4,500
Smartphone/
mobile
broadband users

This report presents insights from an online survey of advanced smartphone/mobile broadband users aged 18–69. The respondents represent only 16 percent of the total population of over 650 million living in Germany, Japan, South Korea, the UK and the US. The respondents have higher than average use of fitness trackers, smart watches, and health apps to monitor their health. They were interviewed online to study their health monitoring behaviors.



Online expert interviews:

900
Cross-industry
decision makers

An online survey covering decision makers across six industries – healthcare, insurance, medical technology, telecoms, app developers/aggregators and government regulatory bodies – was carried out in Germany, Japan, South Korea, the UK and the US.

KEY FINDINGS



Healthcare becomes decentralized, moving from hospitals towards homes

- › 39 percent of patients with chronic ailments prefer online consultations to face-to-face meetings
- › One in two consumers says wearables can improve healthcare management

Patient data is centralized, turning hospitals into data centers

- › 35 percent of consumers say an online central repository of medical records will improve healthcare management
- › 46 percent of cross-industry decision makers consider data security to be a key issue

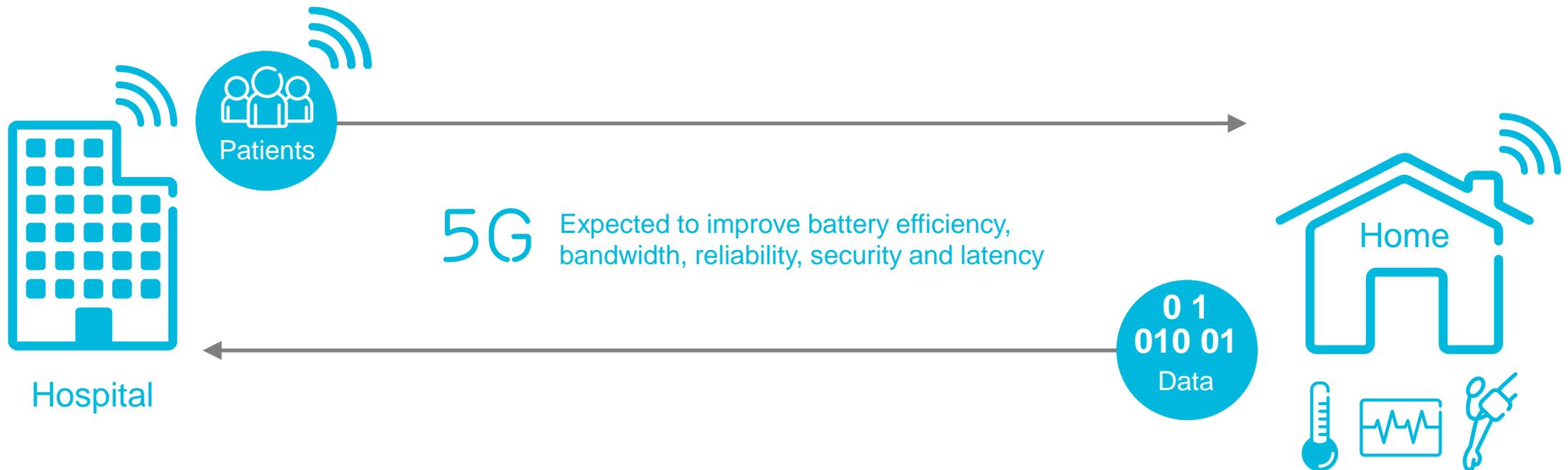
Cross-industry decision makers expect 5G to address consumer healthcare concerns

- › 56 percent of consumers worry about their wearable health patches running out of battery
- › 61 percent of consumers say remote robotic surgery is risky as it relies on the internet

TRANSFORMING HEALTHCARE



Care moves away from hospitals closer to home, whereas data moves from patients to centralized healthcare repositories



DIFFERENT REASONS FOR DECENTRALIZED CARE



Consumers want convenience; cross-industry decision makers want savings and efficiency

- Consumers
- Cross-Industry decision makers

Say that care closer to home gives quicker access to care and helps manage health conditions better



Say that moving care from larger hospitals to local healthcare centers can reduce costs and improve efficiency



Of cross-industry decision makers say that automation and remote solutions will address resource scarcity in healthcare

THREE ASPECTS DRIVING TRANSFORMATION



Use of wearables to monitor health and administer medication remotely



Increase in online consultations



Use of remote procedures (such as robotic surgery) performed at local healthcare centers closer to patients

WEARABLES GIVE CONSUMERS MORE CONTROL



62%

Agree that wearable devices will put people in control of their own health

58%

Agree that wearable devices with feedback and alerts will provide personalized care

60%

Agree that wearable devices will lead to a healthier lifestyle



Over 60 percent of consumers are ready to use wearables as a preventive measure for checking abnormalities and countering chronic ailments. However, 55 percent of healthcare decision makers from regulatory bodies say these devices are not sufficiently accurate or reliable for diagnosis

49%

Of cross-industry decision makers say that wearables could replace routine healthcare services

ONLINE CONSULTATIONS CAN REDUCE WAIT TIMES

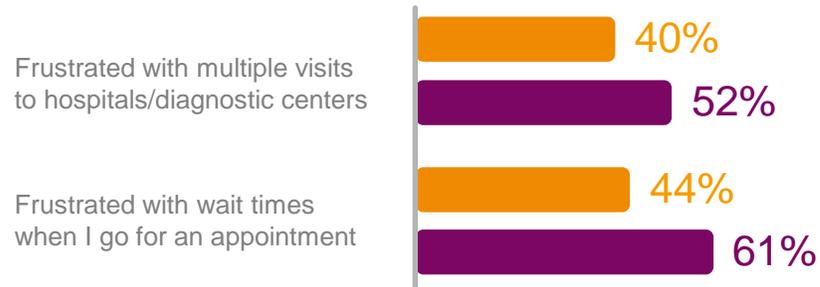


Patients and care givers are frustrated with inconveniences due to wait times for doctors and multiple visits to hospitals/diagnostic centers

39%

Of patients with chronic ailments say that online consultations with doctors will make it easier to manage their health

- Post-operative care patients
- Patients with chronic ailments



56%

Of post-operative care patients say that robotic surgery would reduce wait times for surgery

Source: Ericsson ConsumerLab, From healthcare to homecare, 2017
Base: 4,500 smartphone mobile broadband users, across Germany, Japan, South Korea, UK, US, aged 18-69

ELDERLY WANT LOCAL HEALTHCARE



Elderly want to stay at home longer and be independent. However, consumers worry about elderly patients being exposed to in-home slips and falls, and not taking prescribed medicines



What would be helpful is, without going to the doctor, one can actually check if they have vitamin deficiencies or whether their cholesterol level is high, and can do all this from the comfort of their home with great accuracy.”

Male, UK



Of consumers worry about elderly patients being left unattended



Of consumers would like to have sensors at home to monitor the elderly, to detect emergency situations and to dispatch ambulance services when required

Source: Ericsson ConsumerLab, From healthcare to homecare, 2017
Base: 4,500 smartphone mobile broadband users, across Germany, Japan, South Korea, UK, US, aged 18-69

5G EXPECTED TO IMPROVE CONNECTIVITY AND BATTERY LIFE

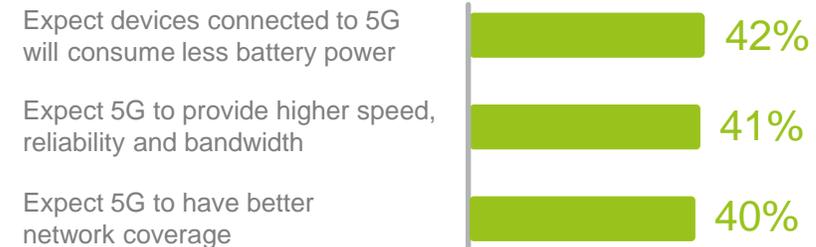


Experts say that existing networks cannot support massive IoT, and face challenges of providing desired quality of support for connecting large number of devices/wearables

Consumers



Cross-Industry decision makers



Source: Ericsson ConsumerLab, From healthcare to homecare, 2017
Base: 4,500 smartphone mobile broadband users, across Germany, Japan, South Korea, UK, US, aged 18-69

Base: 900 cross-industry decision makers across, healthcare, insurance, regulatory bodies, app developers, telcos and medical-technology companies

BETTER DATA SECURITY EXPECTED FROM 5G



5G networks are expected to be secure enough to adhere to sensitive patient data regulations



It all depends on the ability of the network to move a huge medical record quickly, more securely and without any time delay. Doctors can exchange sensitive patient data more confidently and take timely decisions.”

Healthcare decision maker, UK

■ Cross-industry decision makers

Telecom decision makers say that developing secure networks to access an online central repository is a key challenge



Agree that data security is an issue for online and remote healthcare services



Source: Ericsson ConsumerLab, From healthcare to homecare, 2017
Base: 900 cross-industry decision makers across, healthcare, insurance, regulatory bodies, app developers, telcos and medical-technology companies

5G EXPECTED TO FACILITATE REMOTE AND HAPTIC FEEDBACK



5G is expected to provide reliable and sub-1ms latency connections with haptic feedback and highly-immersive virtual simulation required for remote surgery



Of cross-industry decision makers say robotic surgery with haptic feedback capabilities could be a breakthrough



Of cross-industry decision makers expect 5G to enable remote robotic surgery

Source: Ericsson ConsumerLab, From healthcare to homecare, 2017
Base: 900 cross-industry decision makers across, healthcare, insurance, regulatory bodies, app developers, telcos and medical-technology companies

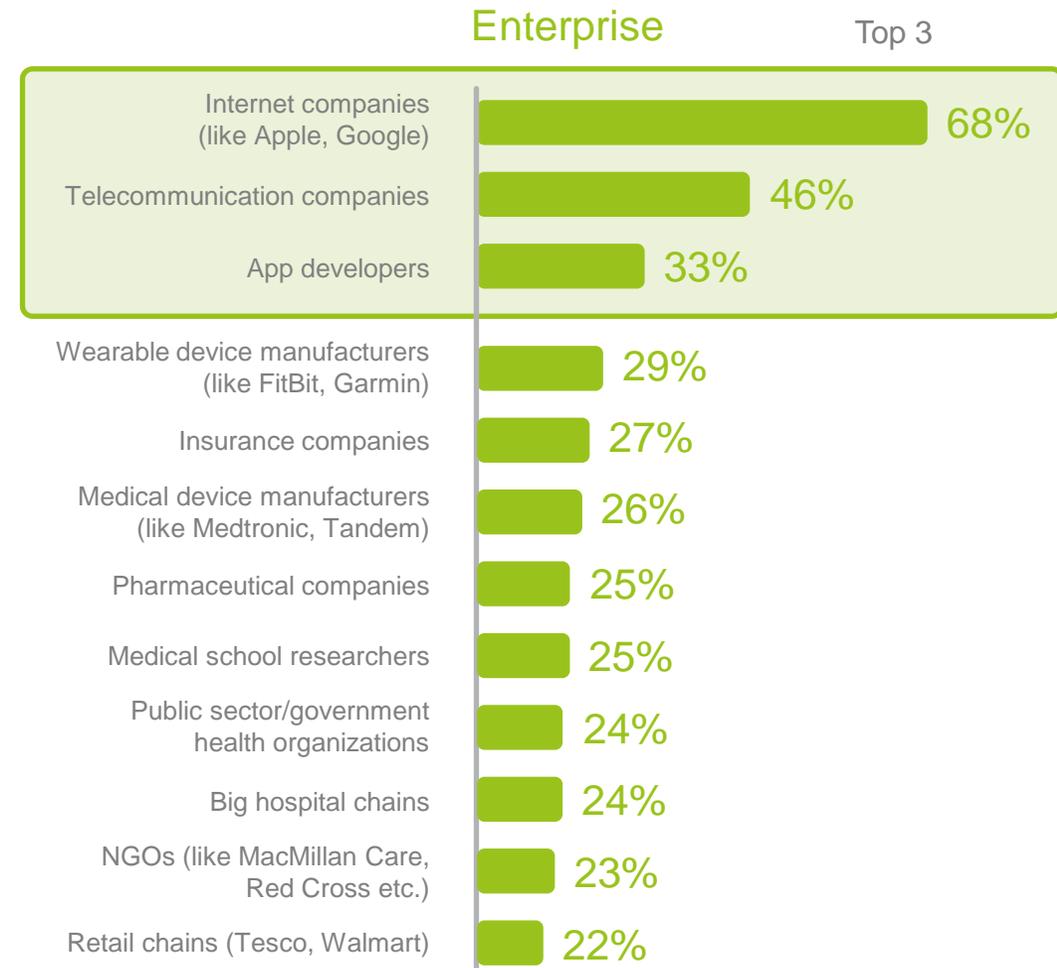
A NEED FOR COLLABORATION



Cross-industry decision makers consider internet companies, telecom operators and app developers as the top three preferred partners for healthcare

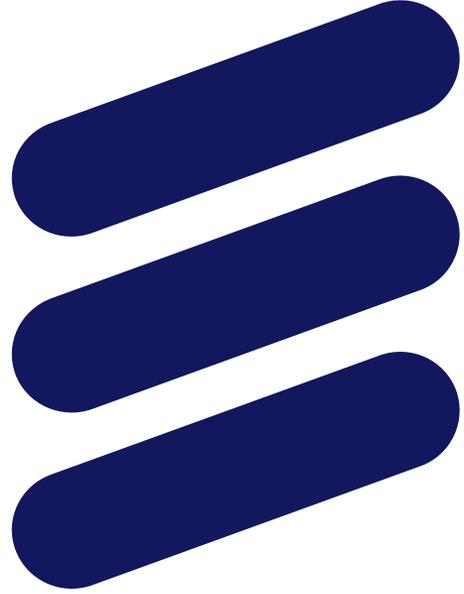
86%

Of cross-industry decision makers feel telecom operators need to go beyond connectivity, assuming greater responsibility by providing system integration and app and service development



Source: Ericsson ConsumerLab, From healthcare to homecare, 2017

900 cross-industry decision makers across, healthcare, insurance, regulatory bodies, app developers, telcos and medical-technology companies



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