



# HEALTH TECH IMPACT STUDY

Examining the Role of Technology &  
Innovations in Helping Manage Health Better





# TECHNOLOGY AND HEALTH

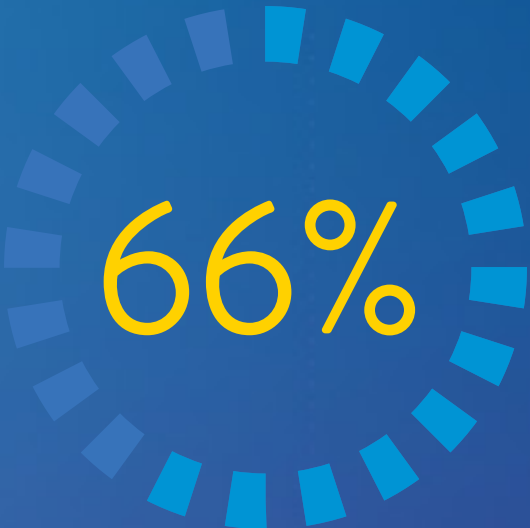
India's growth story has been punctuated by the development, and integration of different technologies. The healthcare space is no exception, and technology has been transformational for the industry and patients alike.

India is at a pivotal stage in its development journey. To support the potential of our growing economy, there is a critical need to strengthen the infrastructural pillars which enable this. While technology has been a key driving force of our recent growth across sectors, it is still perceptibly associated with manufacturing, services, education, and increasingly, the creative sector.

Healthcare is another such crucial area where technology can help elevate the care experience and create life-changing solutions to overcome limitations in healthcare delivery. India's healthcare burden continues to be significant, with a range of social, structural, and cultural factors contributing to its weight. Healthcare technologies offer a unique opportunity to be able to effectively tackle these issues, at the scale necessary.



According to recent WHO reports,  
our NCD burden is still steep, accounting for



OF THE DISEASE  
BURDEN IN INDIA

India's NCD burden is distributed across different conditions, with

77M

ADULTS CURRENTLY  
SUFFERING FROM DIABETES

54.6M

INDIANS  
HAVE A CVD

28%

OF ALL MORTALITIES IN INDIA  
ARE RELATED TO CVDS (WHO report)

World Health Organization. "Invisible numbers: The true extent of noncommunicable diseases and what to do about them." (2022).

While digitisation of health in context to fitness enjoys greater share of mind, medical technology has seen some significant evolution. These life-changing solutions can go a long way



TO HELP ADDRESS  
KEY NCDs LIKE DIABETES  
& CARDIOVASCULAR  
DISEASES



AND REDUCE  
HOSPITALISATIONS &  
AFFECT OVERALL  
MORTALITY REDUCTION.

Innovation in healthcare technology is already tangibly impacting patient lives - not just in treatment, but in elevating their overall experience. The report brings data to the table showing how an increasing number of doctors

are willing to put their faith in the use of minimally invasive healthcare technologies for active patient care, ranging from remote monitoring devices for early detection, to better management, and eventually

better decision making. They believe healthcare technology can step out of the hospital rooms and into the daily lives of patients, giving them better control over their lives, and live stress free.



Living with chronic illness is overwhelming and complex. Technology can play a role in alleviating some of those pain points. This report was aimed at understanding the perceived benefits of technology beyond physical health & care delivery, and consider how it can elevate an individual's healthcare experience in context to their everyday life. The support for healthcare technologies also comes from surprising quarters, young mothers and mature adults - two cohorts much more aware of and invested in their health.

The acceptance of health tech is also an indicator of people's desire to take on a more active role in the management of their health.



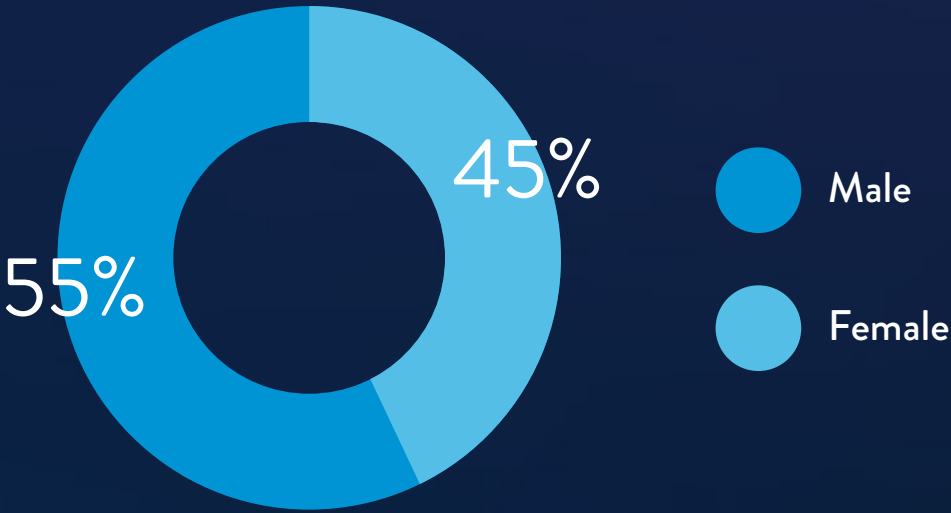
# PEDAGOGY & METHODOLOGY

The report's key objective was to explore and highlight the impact of technologies in patient care. The study was aimed at understanding attitudes, perception and behaviour, of both, patient and physician, around the use of healthcare tech in care delivery and health management. The study was conducted with Kantar, as our credible partners.

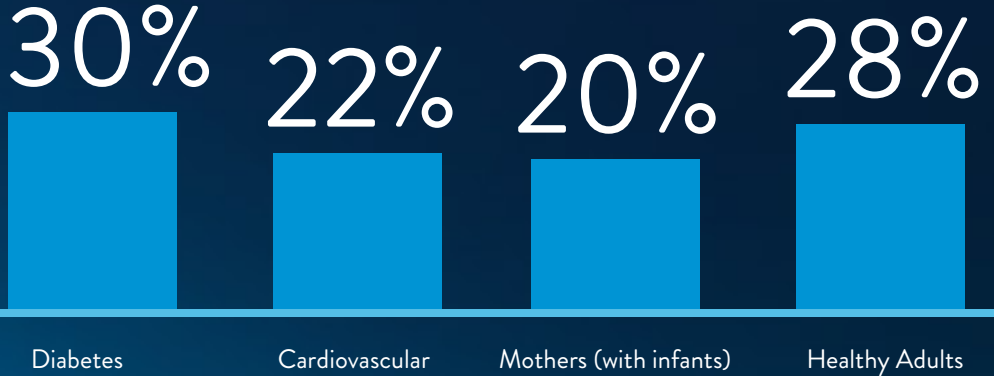
With careful consideration, the sample set included a substantial numbers of doctors and patients, with a diverse spread across geography, gender, age, specialty of practice, experience, patient type and status of health.

Opinions from 285 doctors & 1208 patients were taken into consideration, distributed across the metro and tier 1 cities of Kolkata, Delhi, Mumbai, Chennai, Patna, Lucknow, Bangalore, Hyderabad, Pune and Ahmedabad.

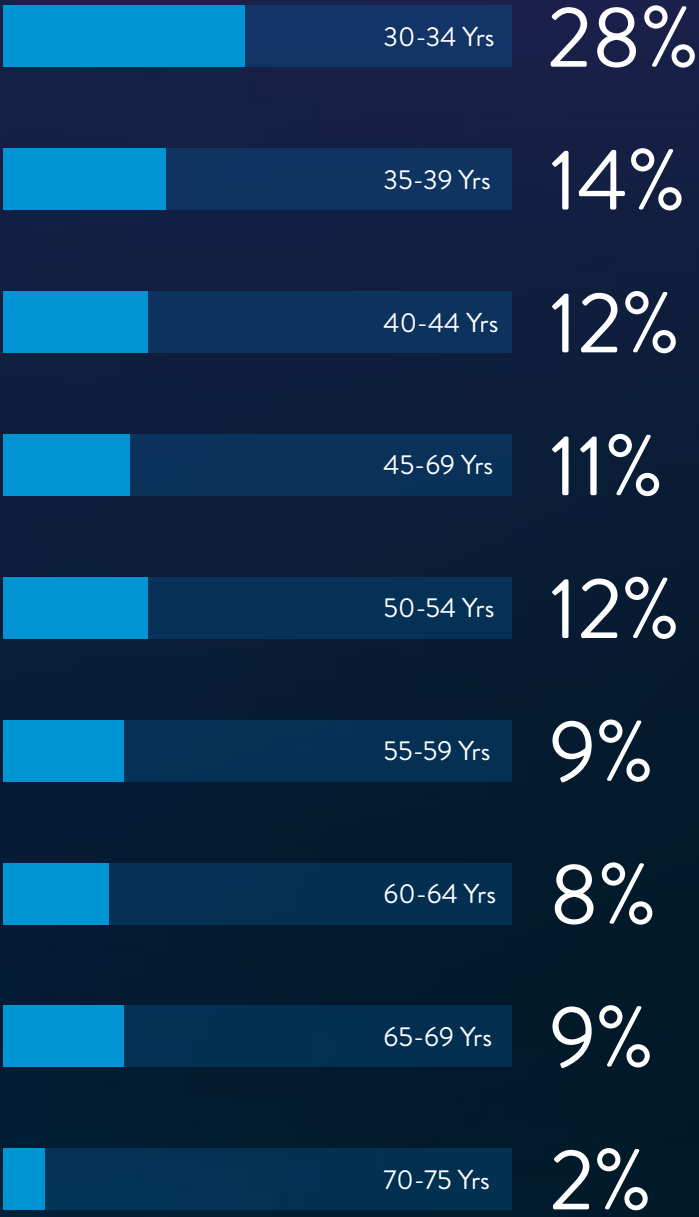
GENDER



PATIENT TYPE



AGE



HEALTH STATUS





# OVERVIEW

There is unequivocal support for healthcare technologies :

2 out of 3 doctors believe

healthtech has improved quality of life post-procedure.

There is strong belief shown for impact on **reduction in mortality rate (57%), reduction in recovery time (48%), reduction in hospitalisation duration (56%).**

Doctors remain bullish about the future:

The top 3 future trends

are better **decision-making, connectivity for better monitoring, and early detection.**

1 out of 3 doctors

who currently do not use any online patient care platforms are **open to trying them.**



Consulting physicians, and those with a  
**practice > 20 years**  
have a relatively higher intent to invest  
**in new technologies in the future.**

‘Feel better about yourself’, ‘stress-free’  
& ‘freedom of living the way I want’ are the  
**top 3 perceived benefits**  
from consumers. Overall many feel healthcare tech  
has helped them return to their old selves.

For patients, technology has  
had an impact in the following areas:  
**their health status, vitals  
& post-procedure recovery.**

Aggregately, healthcare technologies are extremely  
important for better health management, with  
**mothers (with infants)  
& mature adults (50-59 years)**  
showing greater support towards the adoption  
of healthcare technologies.

Patients show trust  
in glucose monitoring, with the **glucometer & CGM** being **devices relied on most**, and used at least once or multiple times a day.

The brand, quality and price  
of a device are all strong factors for consumers when **selecting healthcare technology**.

For the  
**purchase of specialised devices**, patients rely heavily on **doctor recommendations**. For at-home care, this expands to include recommendations from **family & friends, followed by local pharmacists**.

# REPORT FINDINGS



**1. Doctors are bullish on the use of healthcare technology, with a focus on improving it for better care delivery and patient outcomes.**

The doctors that took part in the study consider healthcare technologies to have a significant impact on their decision-making capabilities, enabling quicker treatment as well as early detection and diagnosis of diseases.

**The benefits of healthcare technologies, also seen as top drivers for future adoption, include:**



BETTER  
DECISION MAKING



QUICK  
TREATMENT



EARLY  
DETECTION



REAL-TIME  
MONITORING



QUICK DIAGNOSIS  
OF DISEASES



MEDICAL  
MANAGEMENT

An important positive indicator of the future of healthcare and patient life is the fact that

# 2 out of 3 doctors

believe healthcare technologies will lower mortality rates, lower hospitalisation duration times, and improve the patients post-recovery overall quality of life.

1 out of 2 cardiologists believe healthtech reduces recovery time, and 4 out of 10 cardiologists have found health-tech devices extremely effective in decision making & treatment.



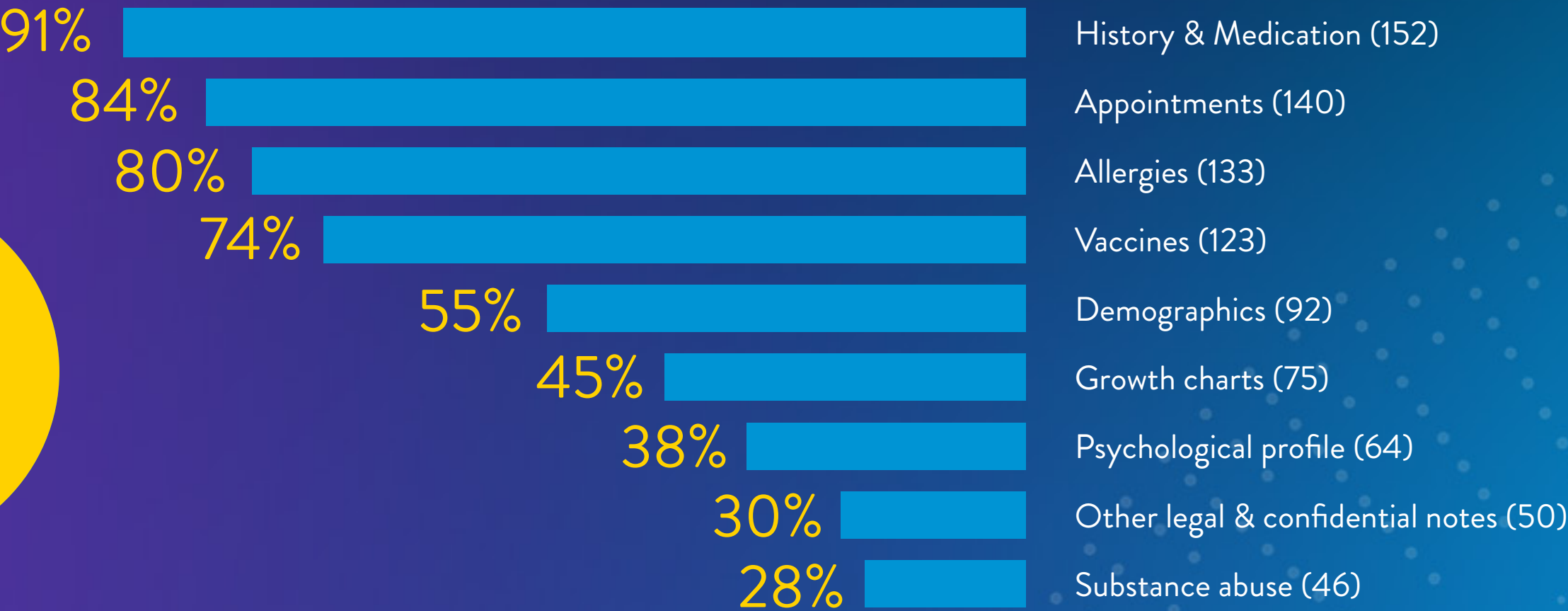
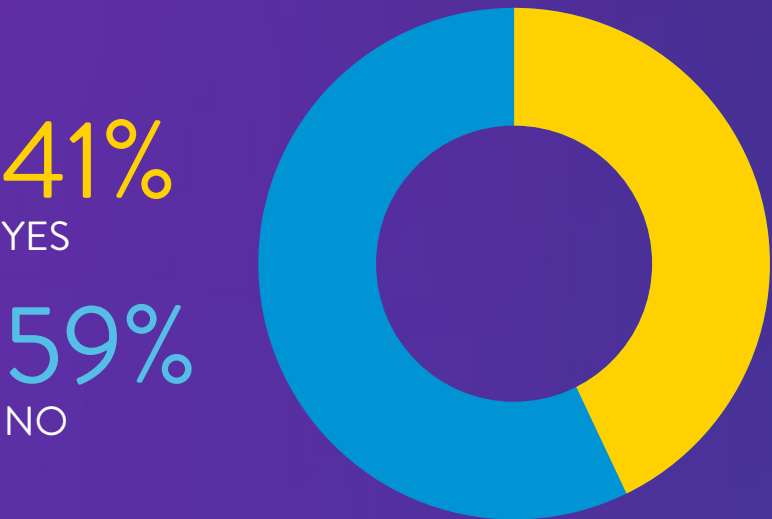


# 2. Doctors show further belief in digital solutions and devices as part of patient healthcare monitoring.

2 out of 3 doctors in the study currently use digital solutions for maintaining patient clinical information, with 91% using it for patient history and medication information, as well as maintaining allergies records, and appointments.

Percentage of doctors using digital solutions for various patient information parameters:

Doctors using digital solutions for clinical information



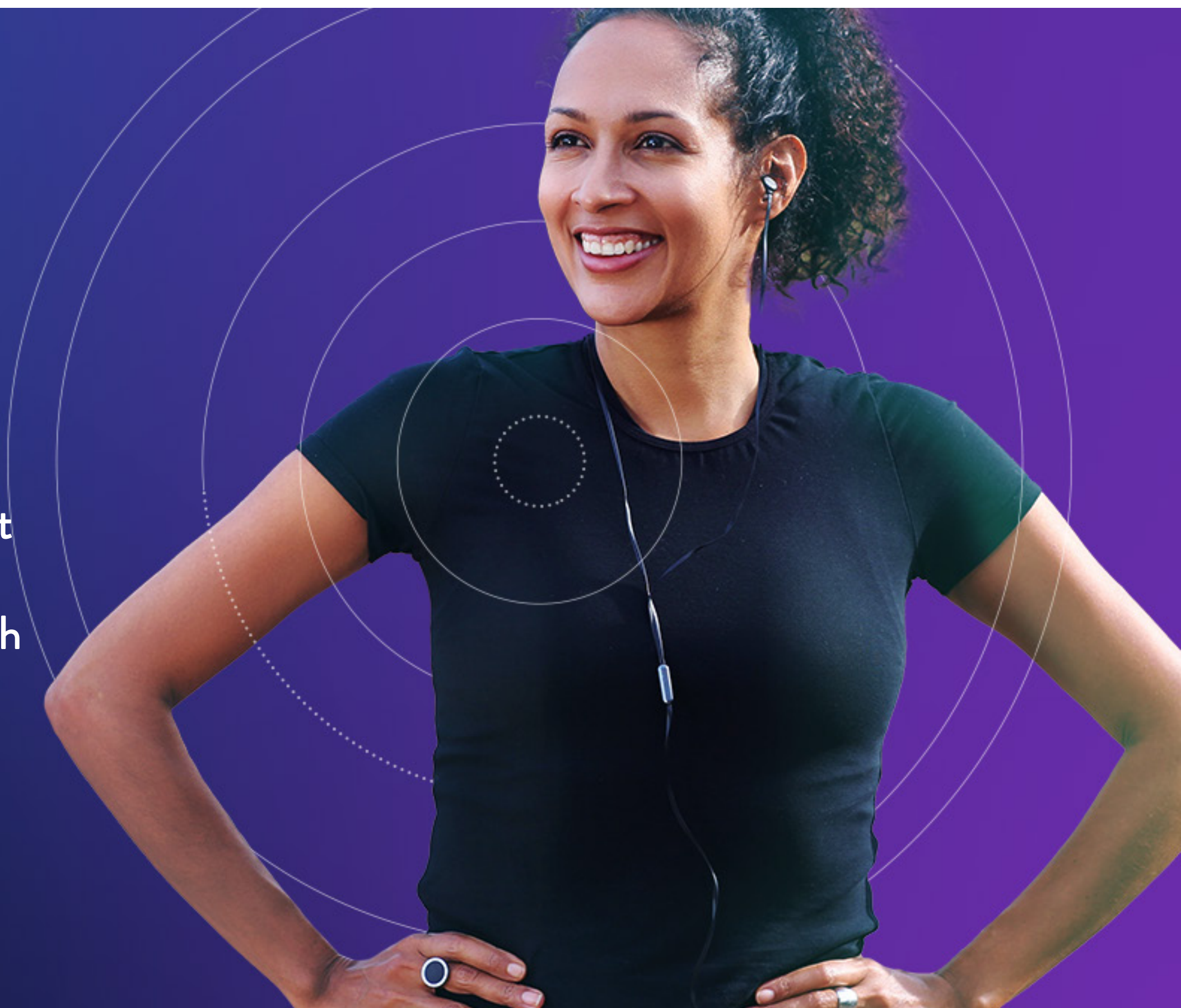


When it comes to devices,

# 9 out of 10 doctors

recommend at-home care to their patients. The emergence of at-home care is a significant indicator of acceptance and intention for use of health tech in a manner that's more accessible.

Frequent recommendations include Blood Pressure Monitors, Glucometers and Heart Rate and Pulse Monitors.





**3.** Patients are warming up to healthcare technologies for an improved sense of self and a stress free lifestyle.

9 out of  
10 patients

strongly relate with **‘feeling like themselves again’** with the use of healthcare technologies.

For cardiovascular patients, the greatest post-use changes of using health tech was granting real time access to their health status, and enabling better overall control of their health. For people with diabetes, monitoring glucose levels aided them significantly in being able to make the right choices for their health.



Additional motivators and benefits of healthtech adoption cited by patients include:

- ➔ Improved decision-making about their own diet, lifestyle & health regimen
- ➔ Convenient access to their health status
- ➔ Better sense of control on their activities, and impact on their health status
- ➔ Peace of mind knowing they have real-time access to health status
- ➔ Improved adherence to their medication course
- ➔ Quicker recovery & return back to normal life




Though the most surprising and welcoming advocates of healthcare technology are **mothers with infants**

and **mature adults**, who regard the use of technology in health management as extremely important.

Other cohorts who voice the strong importance of technology interventions in health management are cardiovascular patients and people with diabetes. While adults who report themselves as healthy show strong agreement with the importance of healthcare technologies, they are still not the most vocal proponents of the same.

**Cohorts showing highest affinity to healthcare technologies (ranked from highest to lowest):**

- 
- MOTHERS WITH INFANTS
  - MATURE ADULTS (50 - 75 YEARS)
  - CARDIOVASCULAR PATIENTS
  - METRO CITIES
  - DIABETES PATIENTS
  - 30 - 49 YEARS AGE GROUPS
  - NON-METRO CITIES
  - HEALTHY ADULTS

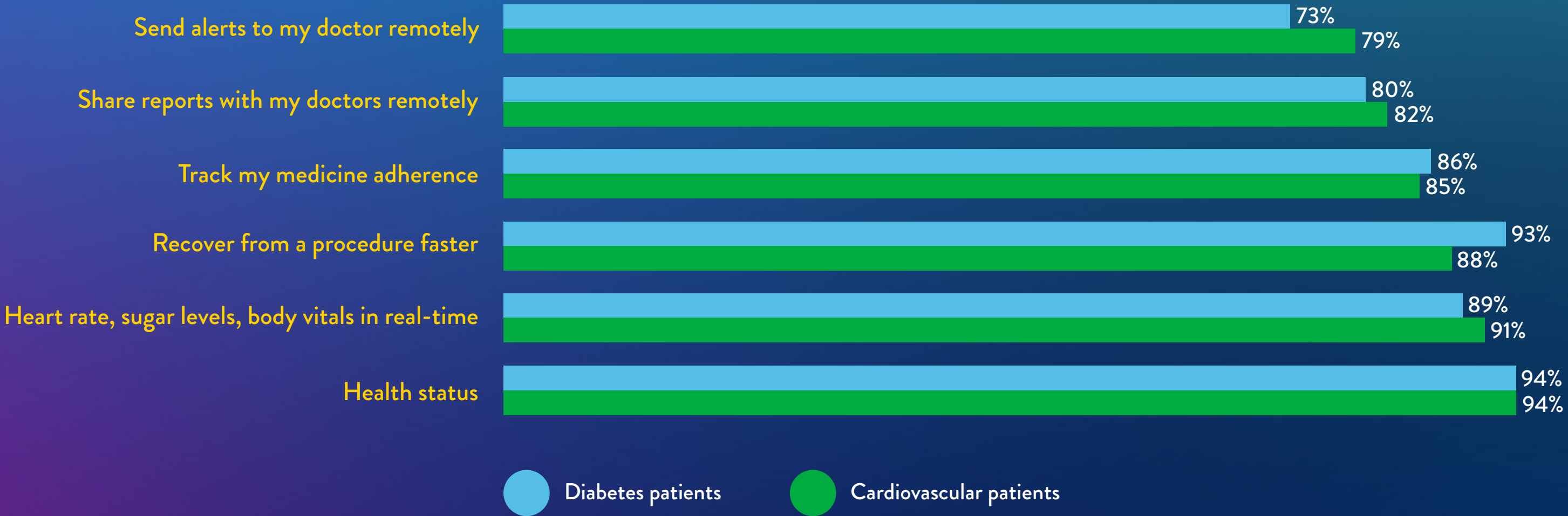
The proliferation of glucose monitoring devices and self-test kits has greatly contributed to people's sense of control over their health, leading to increased confidence in technology.

Patients believe that technology has helped them not just have sight of their health status and body vitals, but also in recovering from medical procedures - with mothers, cardiovascular patients and mature adults finding it most beneficial in that regard.

# Glucose Monitoring and Self-testing kits help people feel more in control of their health.

‘Being able to monitor health whenever needed’ is the key change patients experience whilst using devices like heart monitors, glucose monitors and self-test kits. "Getting back to normal life" has a strong association to glucose monitoring devices and pacemakers.

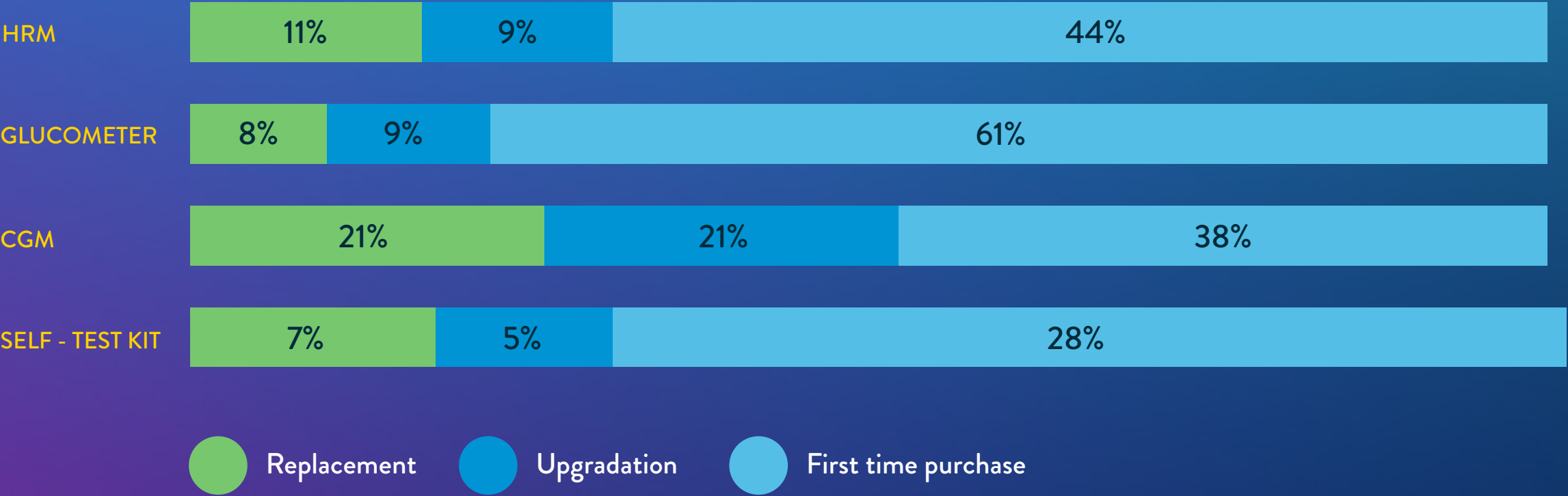
*Impact of technology among cardiovascular and diabetes patients:*



4. Health tech is in early stages of adoption, and has clear potential for increased adoption.

It is still the early days of health tech, with most respondents being first time owners. However, the high upgradation & replacement rates for glucose monitoring devices indicates significant use, and shows promise for a future curve of adoption for at-home care devices.

Graph showing reasons people purchase various healthtech devices:





Doctors and family members are the strongest sources of influence for most patients to use healthtech devices, as trust and prior usage are key factors in helping adoption.

In addition to doctors’ suggestions, the hereditary nature of diabetes translates into a strong family influence in its management for a patient.

When it comes to other technologies, like pacemakers, patients do a thorough search from primary and secondary sources before purchasing them, apart from their doctor’s advice.


Friends and family continue to be strong sources of influence especially when it comes to devices like self test kits, which require minimal domain expertise.

*Other than consulting a doctor, friends & family’s counsel is important before undergoing a test or treatment*

	Overall	Diabetes Patients	Cardiovascular Patients	Mothers (with infants)	Healthy Adults	30-39yrs	40-49yrs	50-59yrs	60-75yrs
I consult a doctor	86%	87%	89%	87%	80%	85%	84%	89%	87%
I go to a Pathology Lab and inquire	18%	20%	16%	12%	20%	16%	19%	20%	17%
I search it online	14%	15%	12%	13%	16%	16%	16%	12%	8%
I search it on the healthcare app	14%	17%	14%	7%	14%	12%	15%	13%	15%
Speak to friends or family who have experienced or have been caregivers for someone	33%	33%	33%	28%	35%	30%	35%	34%	35%

When it comes to selecting a device, the brand, quality, and price of a device are all strong factors for consumers.

Key deciding factors  
for purchase of devices  
(ranked from highest  
to lowest):

- 
- BRAND
  - QUALITY
  - PROVIDES ACCURATE REPORTS
  - DEVICE FEATURES
  - PRICE
  - RECOMMENDED BY THE DOCTOR
  - RECOMMENDED BY FAMILY/FRIENDS
  - PROMOTION / DISCOUNT
  - RECOMMENDED BY PHARMACIST
  - RECOMMENDED BY INFLUENCER (SOCIAL MEDIA)

# CONCLUSION

From wirelessly sharing critical information about your heart through a tiny device to discreet, wearable sensors that continuously monitor glucose levels without a drop of blood.

The merits of technological evolution in healthcare and the positive impact it can have in care delivery are abundant - be it informed decision-making, better monitoring, or quicker diagnosis. However, another key emerging benefit, other than the primary aspect of management of health, is that of the patient experience. This allows health to be something they can take charge of, and have better control and understanding of its nuances. Technology has the potential to make healthcare not just more personalised and dynamic, but also more empowering and accessible. The increasing adoption and recommendation of at-home care solutions, remotely managed and wearable devices is an indicator of changing attitudes towards health.

As these shifts occur,  
healthcare innovations  
can not only offer  
life-changing solutions  
to help manage health  
conditions but an opportunity  
to have a more informed  
dialogue about health  
as we know it.







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