HCP SENTIMENT PART 17

Medical Device Decision-Making Insights

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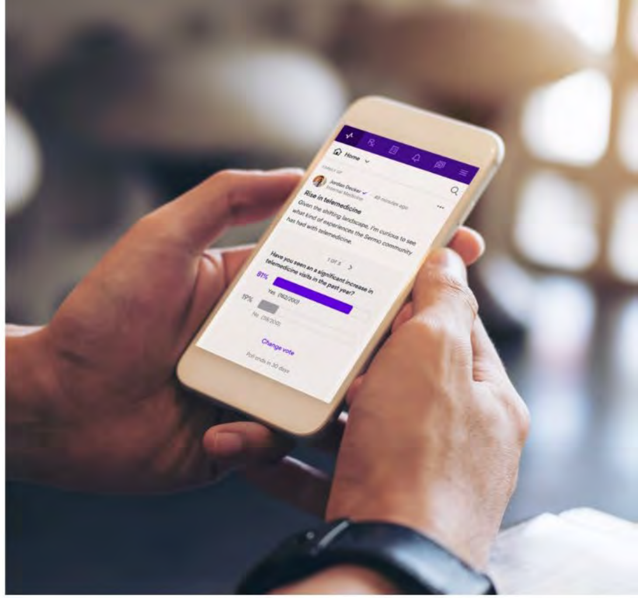
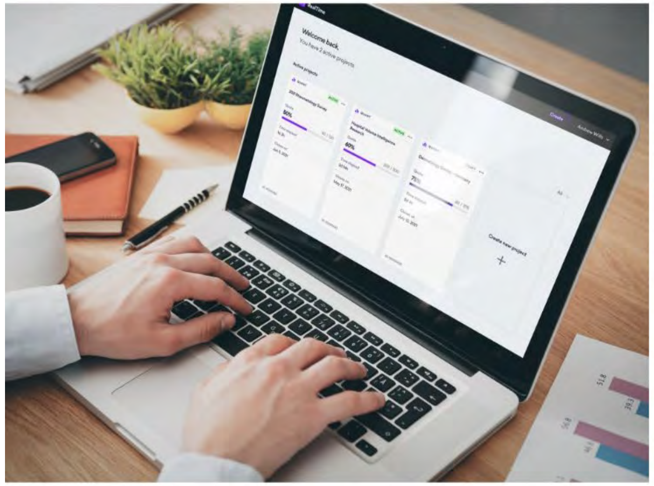




Research sample overview

HCP Sentiment insights are fueled by Sermo's global physician community and proprietary RealTime technology, used to survey n=508 Physicians in Europe, North America, and Asia.

COUNTRY	SAMPLE (n)
USA	122
Canada	50
Germany	50
Spain	41
France	50
UK	52
Italy	43
China	50
Japan	50
Total	**508**

MEDICAL DEVICE INVOLVEMENT	SAMPLE (n)
User (directly operate or utilize devices)	466
Trainer (train others on device use)	190
Buyer (involved in purchasing decisions)	201
Budget-holder (approve or allocate funding)	106

Executive Summary

Executive Summary:

Medical Device Drivers & Barriers

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC

Cost/affordability and **system integration** are universal *organizational* needs

- They represent tablestakes requirements
- Not enough on their own, but could rule out a device

Beyond those, individual HCPs are heavily influenced by:

- **Device ease of use**
- **Demonstrable improvements in patient outcomes**
- **Usability** (and perceived lack of)

Strategic Implications

Provide dedicated integration resources, message around always-on availability

Focus campaigns around substantiated & relevant real world outcome data/results

Demonstrate device utilization & usability through immersive formats like video

Executive Summary:

HCP Engagement Opportunities

Source: RealTime HCP Sentiment 17 study, July 2025.
N=508 physicians in North America, EU5 & APAC

Online formats are highly valued for learning about new medical devices

- Short form videos and infographics drive substantial interest

However, **HCPs seek in-person opportunities for device training** after learning about devices

- Mix of specific training methods desired, particularly: in-person manufacturer led, peer-led, and hands-on
- Time constraints and lack of hands-on opportunities are most common barriers to training on new devices

Strategic Implications

Utilize video and immersive digital channels to raise awareness & educate about new devices

Promote & conduct training sessions post-adoption; leverage as a sales tool

Executive Summary:

Several notable differences exist across specific HCP roles

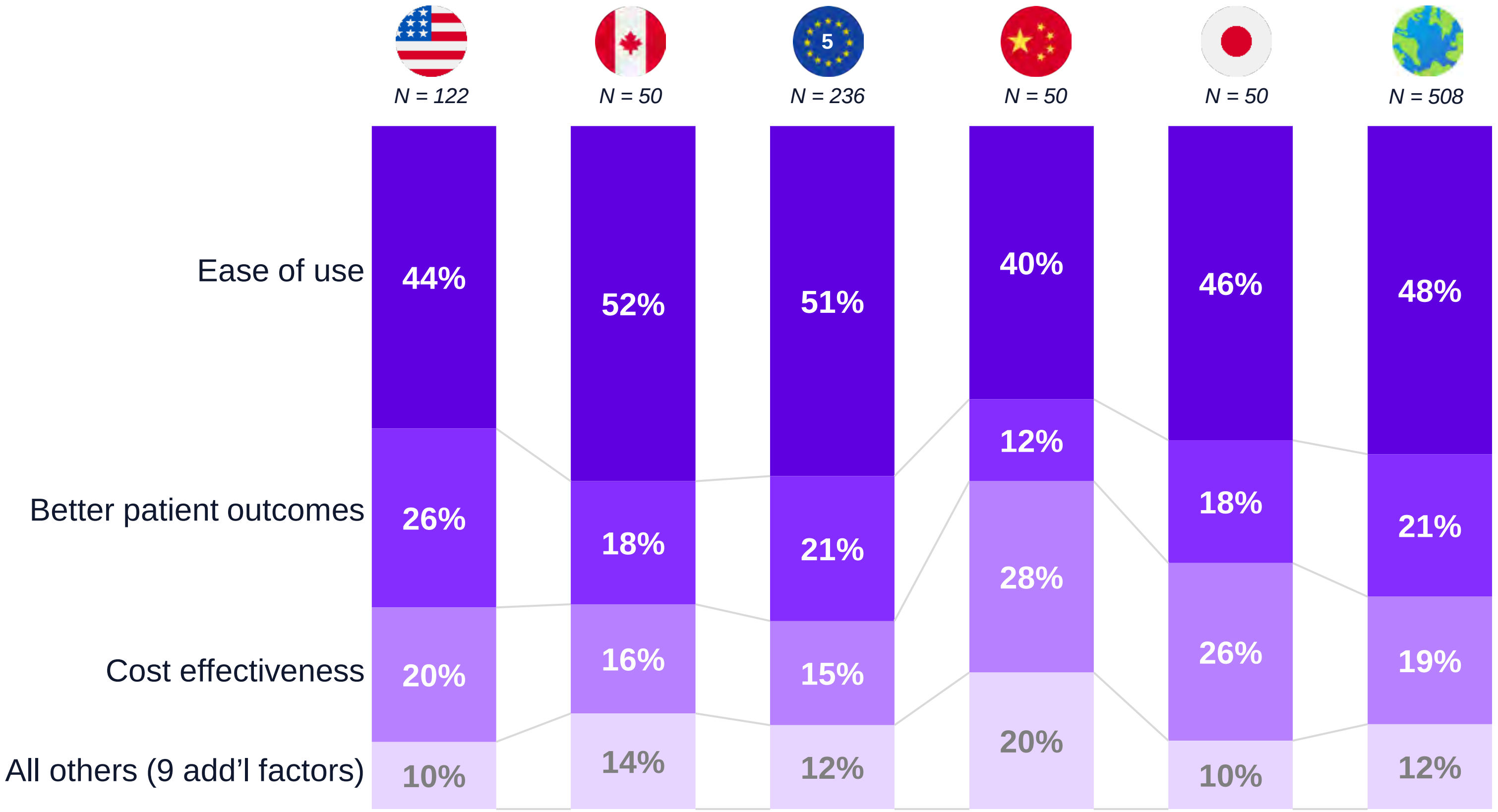
HCP Roles	Device Adoption Drivers	Marketing & Engagement
Device Users Only (users of medical devices who do NOT also have a training, buying, or budget role)	**Consistent with aggregate findings** *Value patient outcomes, durability, integration, use ease*	**Consistent with aggregate findings** *Value online device information, peer recs, in-person training*
All Non-Users (those who have a training, buying, or budget role but are NOT the primary device user)	**Uniquely more driven by cost & simplifying HCP workflow** *(as important as patient outcomes)*	**More open to online information & training formats + social media** *Less influenced by peers, product support, and company communication clarity*
Budget-Holders (includes device users & non-users/overlaps with some above)		
Buyers (includes device users & non-users/overlaps with some above)	**Also highly focused on device cost** *Otherwise like average HCP*	**Consistent with aggregate findings** *Value online device information, peer recs, in-person training*
Medical Device Trainers (includes device users & non-users/overlaps with some above)	**Slightly greater focus on cost + has greatest AI interest in devices**	

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC

Medical Device Decision Drivers

HCPs consider ease of use most when choosing new devices

Q: Please rank the #1 factor that influences your decision to adopt a new medical device

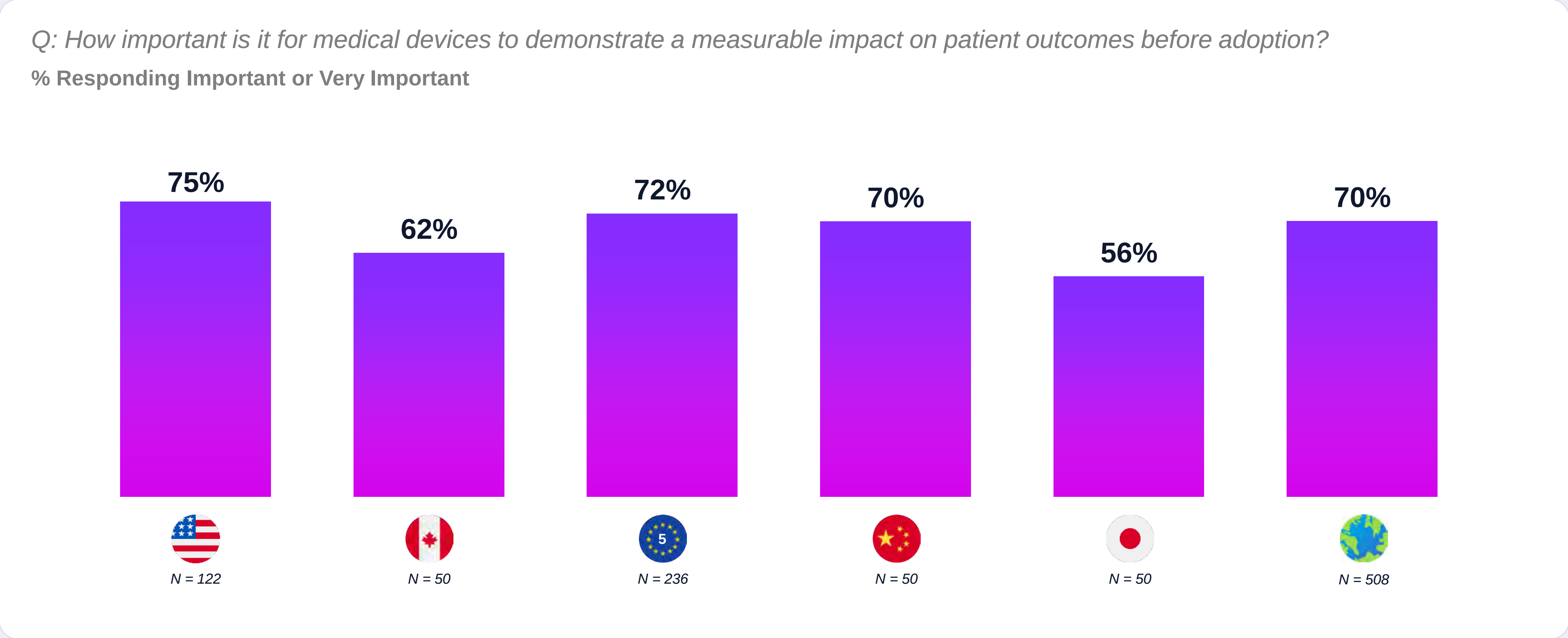


Ease of use consistently outranks other factors, suggesting manufacturers should prioritize intuitive device design.

Those in China and Japan are more sensitive to cost than other markets and should be approached with this in mind.

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q1

Unsurprisingly, measurable patient outcome impact is a critical need when choosing a new device



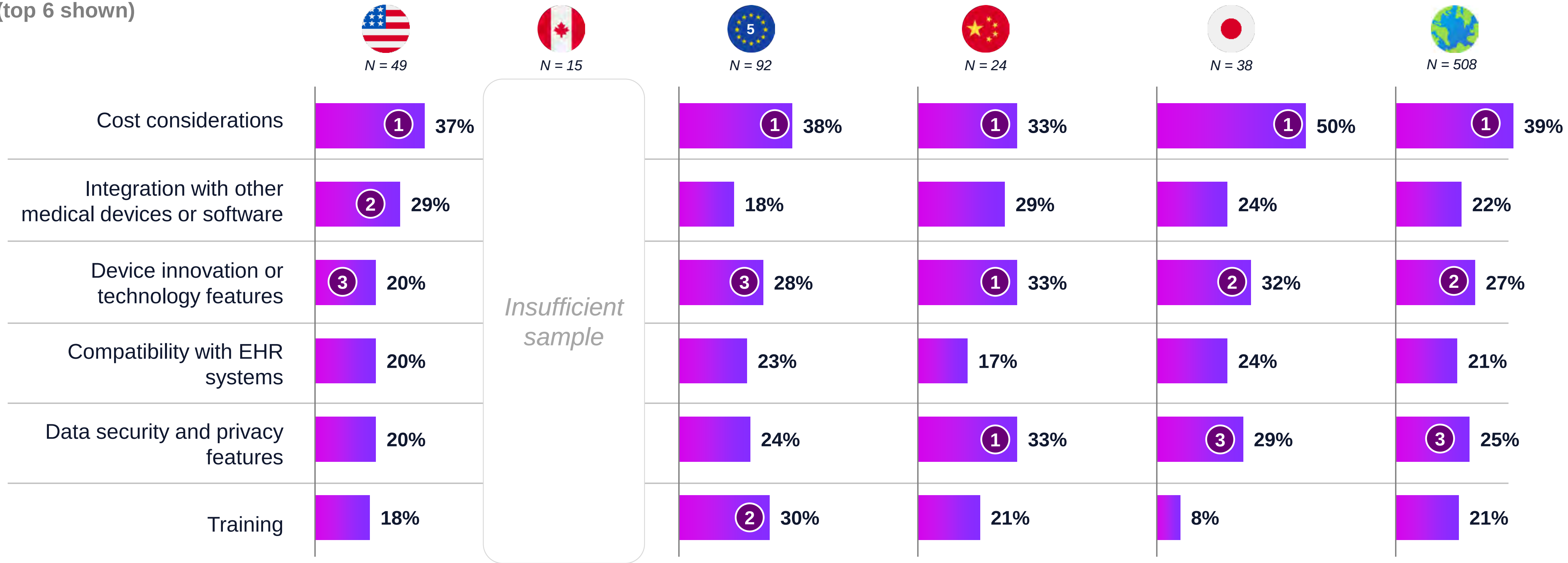
Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q19

Cost is the most influential organizational decision factor in all markets, but secondary decision drivers vary by market

Q: How influential are the following factors in your organization's decision-making process for investing in new medical devices?

Among buyers & budget holders

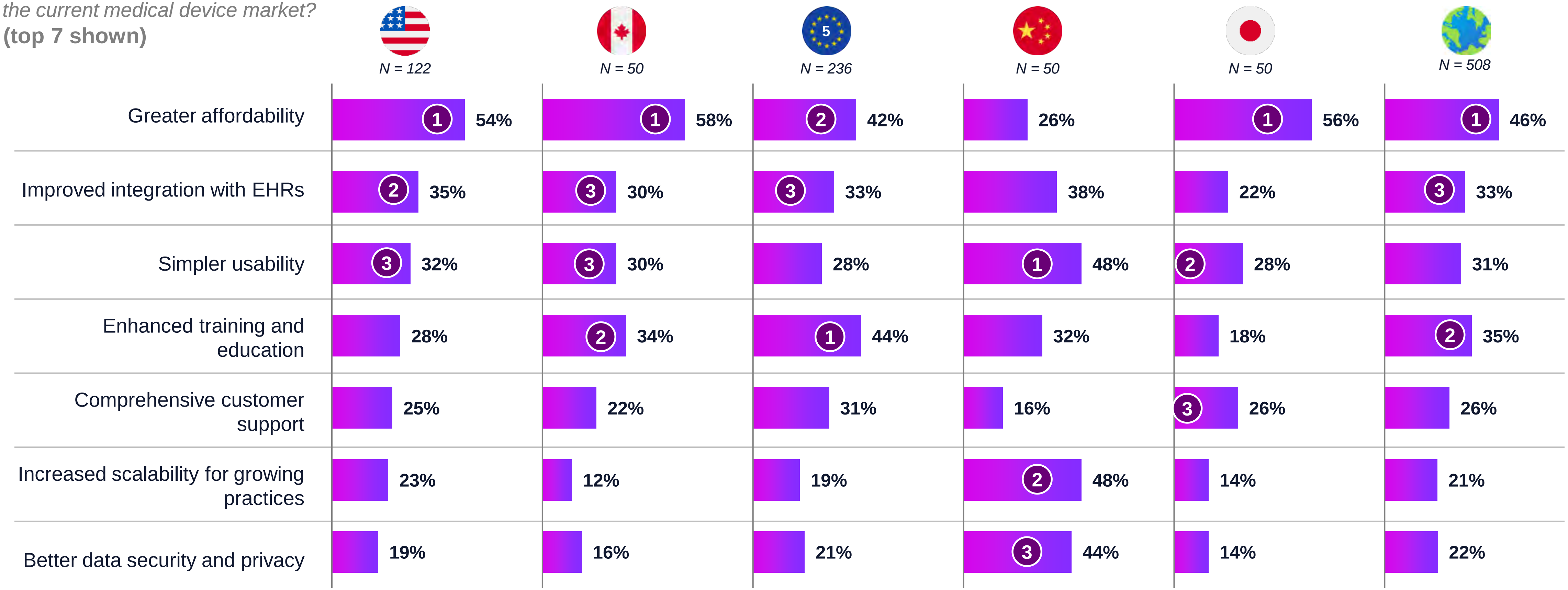
(top 6 shown)



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q5

Improved affordability is highly sought by orgs. in the US, Canada, EU, and Japan; those in China seek improved scalability, usability, and data security

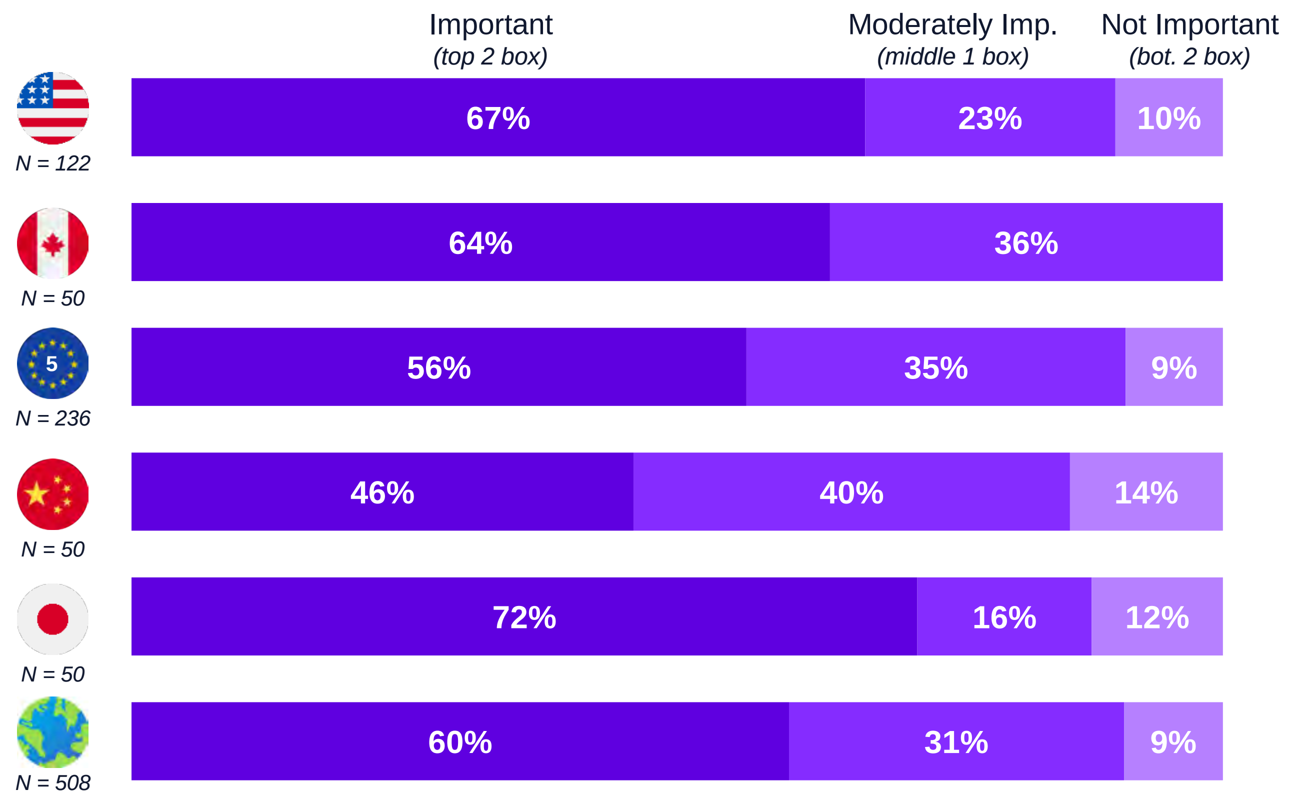
Q: What do you see as the biggest unmet needs in the current medical device market?
(top 7 shown)



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q16

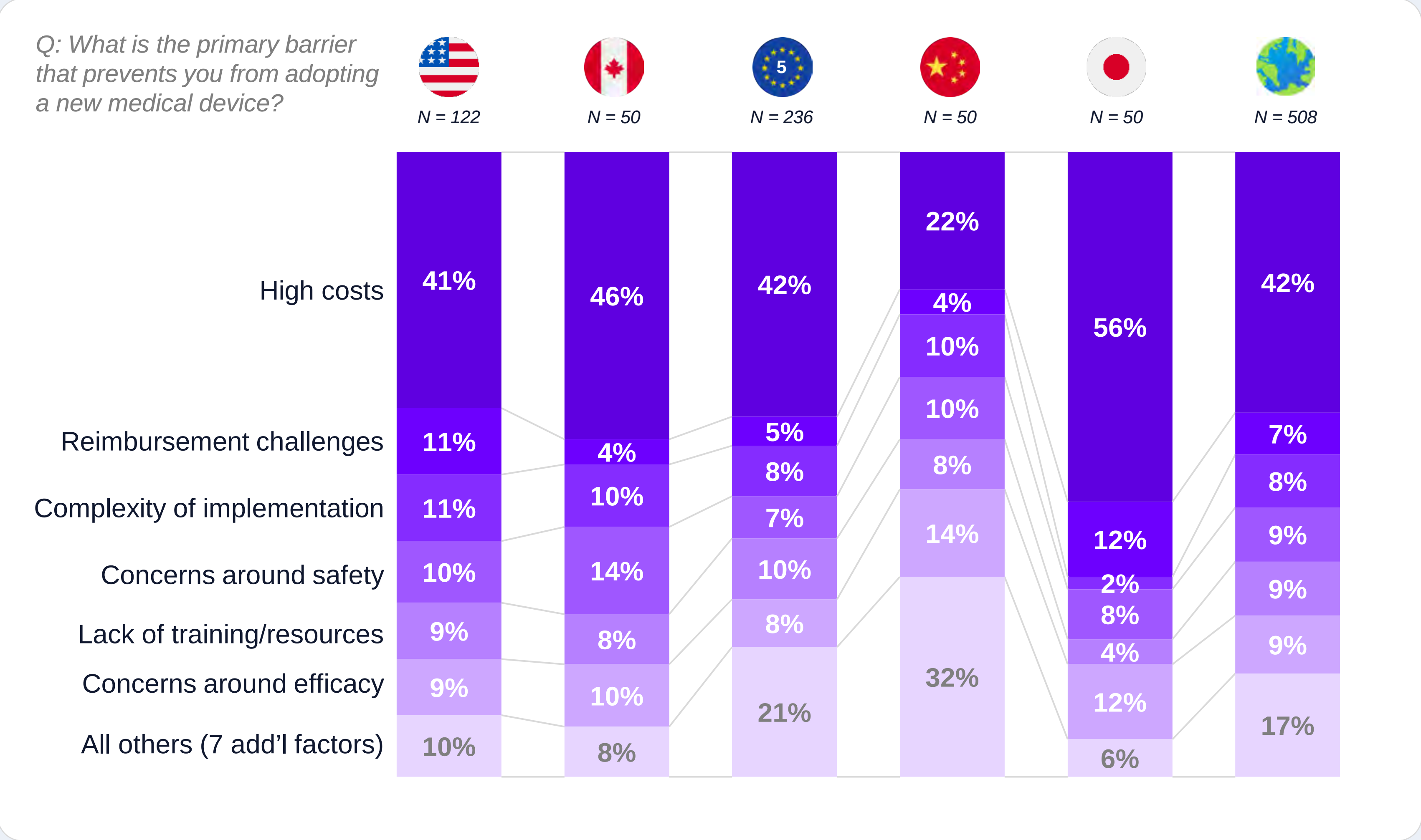
Patient affordability has a significant impact on HCP device recommendations, particularly in China, the US, and Canada

Q: How important is affordability in your decision to recommend a wearable or at-home medical device to a patient?



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q3

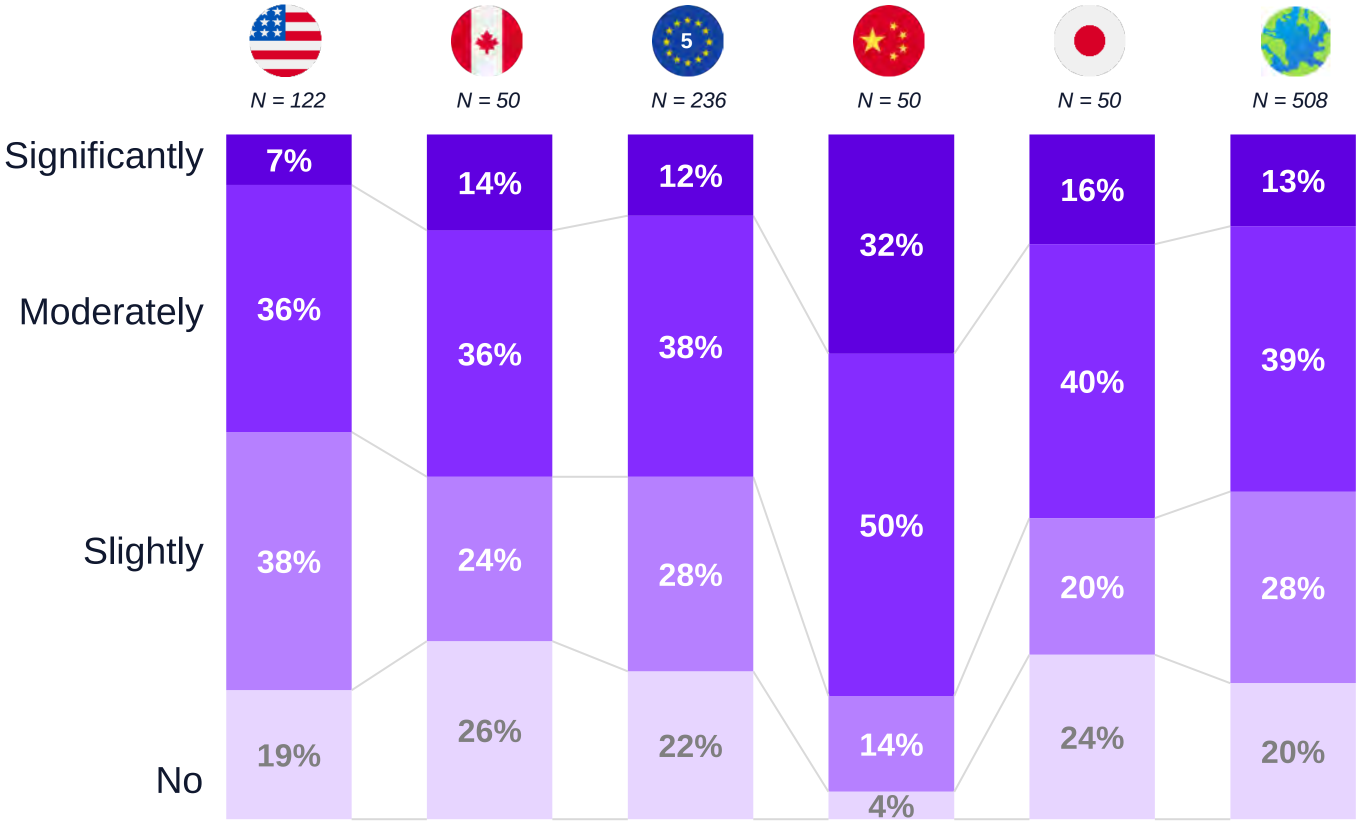
Costs are the most common new device barrier, suggesting HCPs may not be able to get the devices they would otherwise choose



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q2

HCPs are slightly or moderately affected by device reimbursement policy changes in most markets

Q: In the past year, have changes in reimbursement policies influenced your adoption of medical devices?



Physicians and decision makers in **China** are substantially **more impacted by recent reimbursement policy changes**.

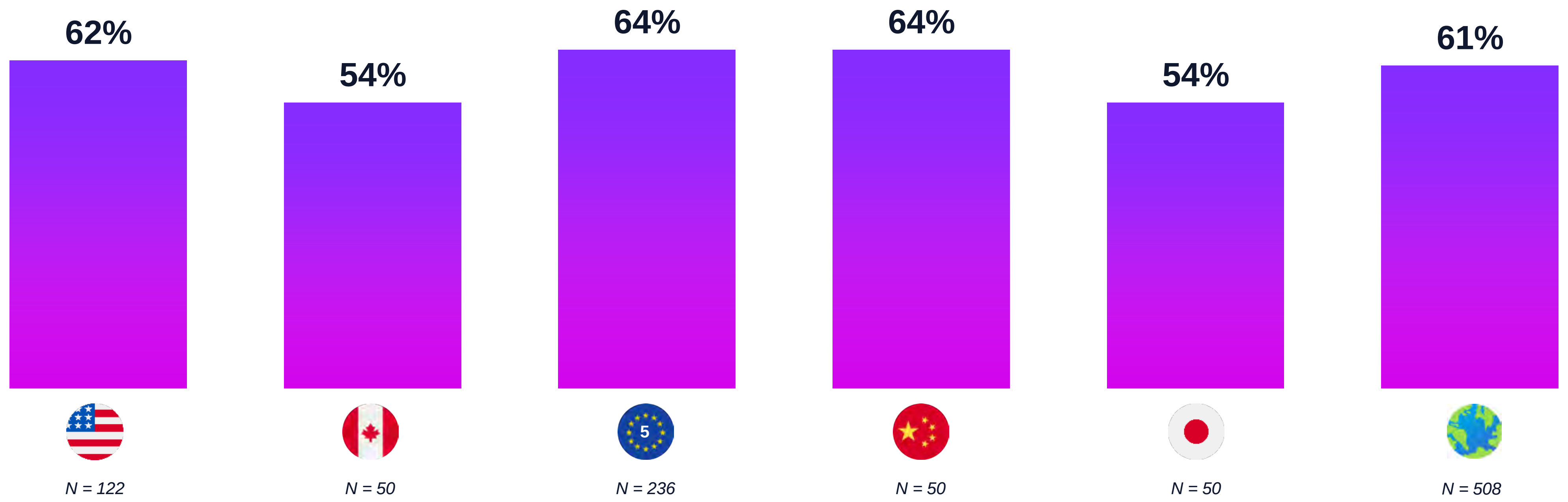
There is an opportunity to demonstrate understanding and solutions to their unique recent complications in sales environments.

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q4

Over half of HCPs in all markets view seamless EHR system integration as an important device consideration

Q: How important is seamless integration of devices with EHR systems or other digital tools that you use?

% Responding Important or Very Important

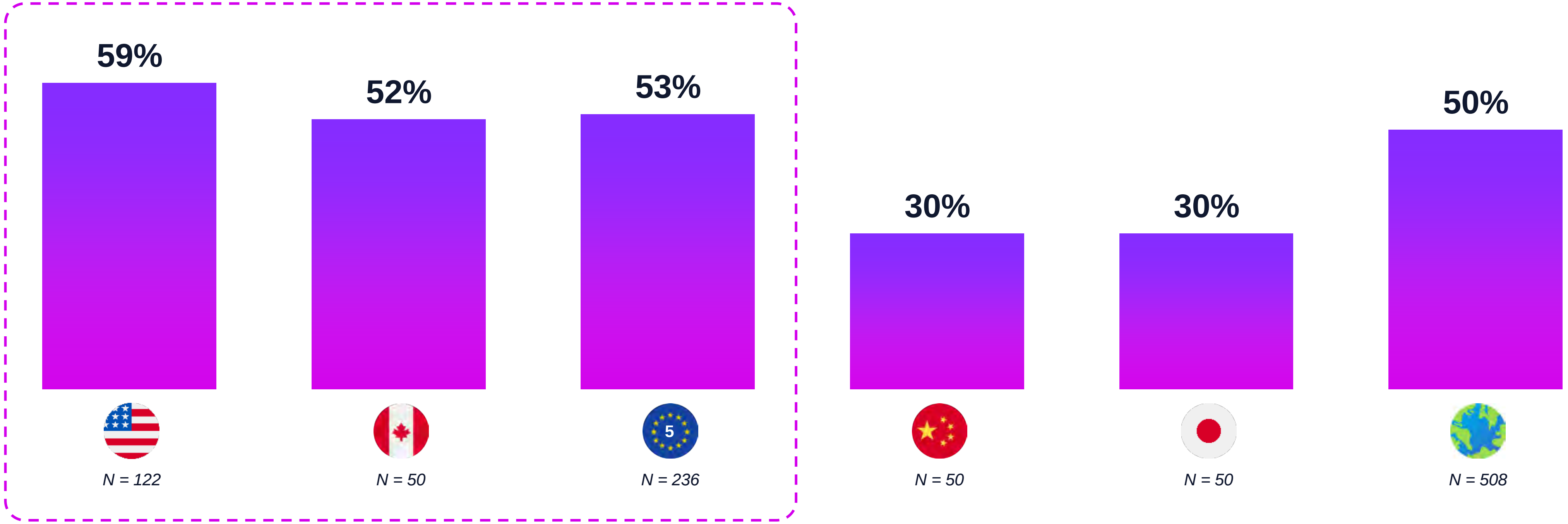


Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q13

Peer recommendations strongly influence device decisions in the US, Canada and EU

Q: How influential are peer recommendations in shaping your decision to adopt a new medical device?

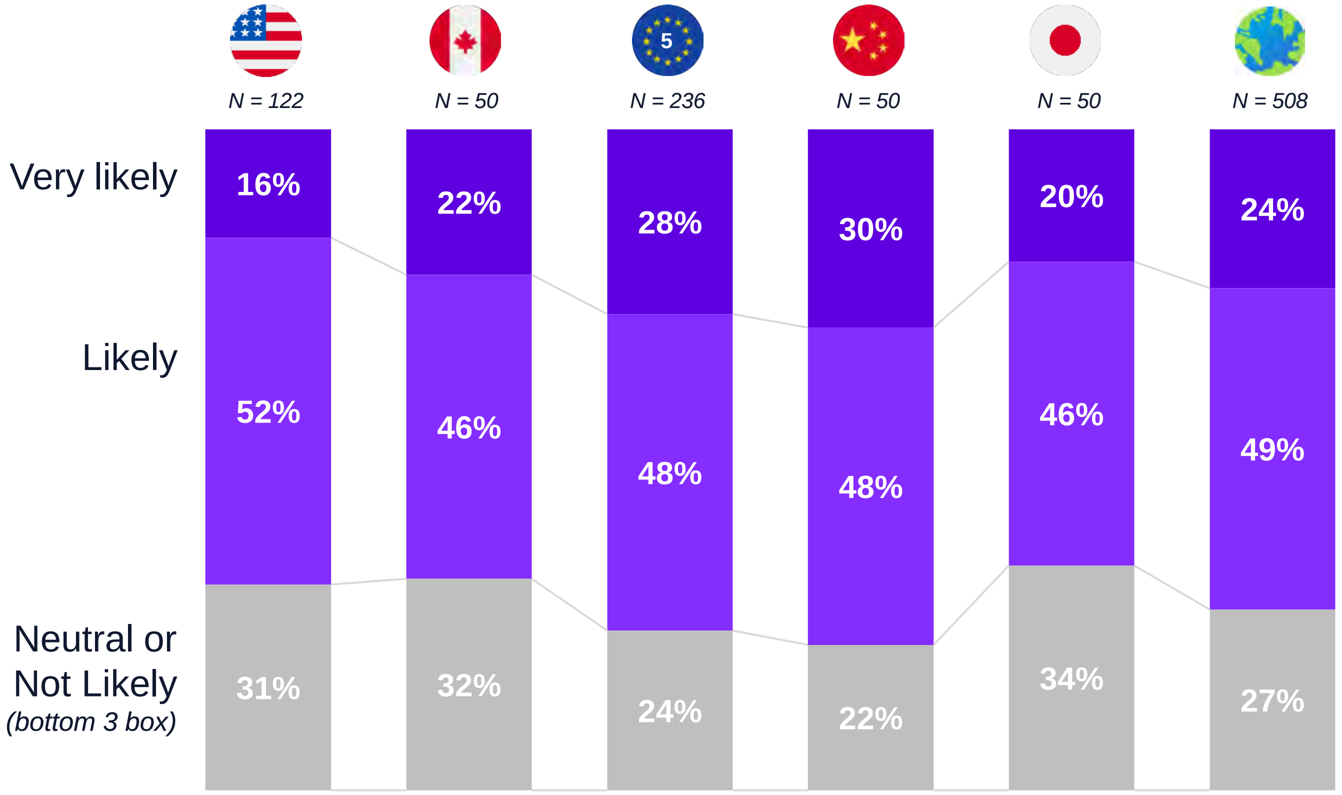
% Responding Influential or Very Influential

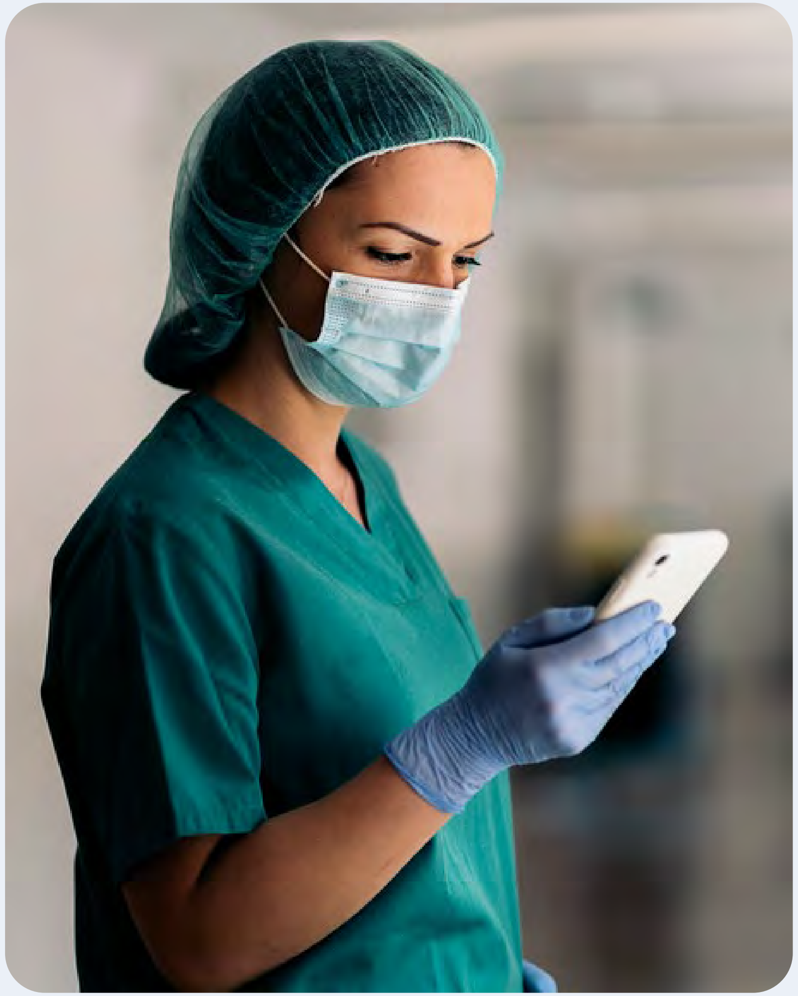


Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q14

HCPs in the EU and China are highly likely to adopt new tech-driven devices

Q: How likely are you to adopt a new medical device that leverages emerging technologies (e.g., AI integration, remote robotics)?





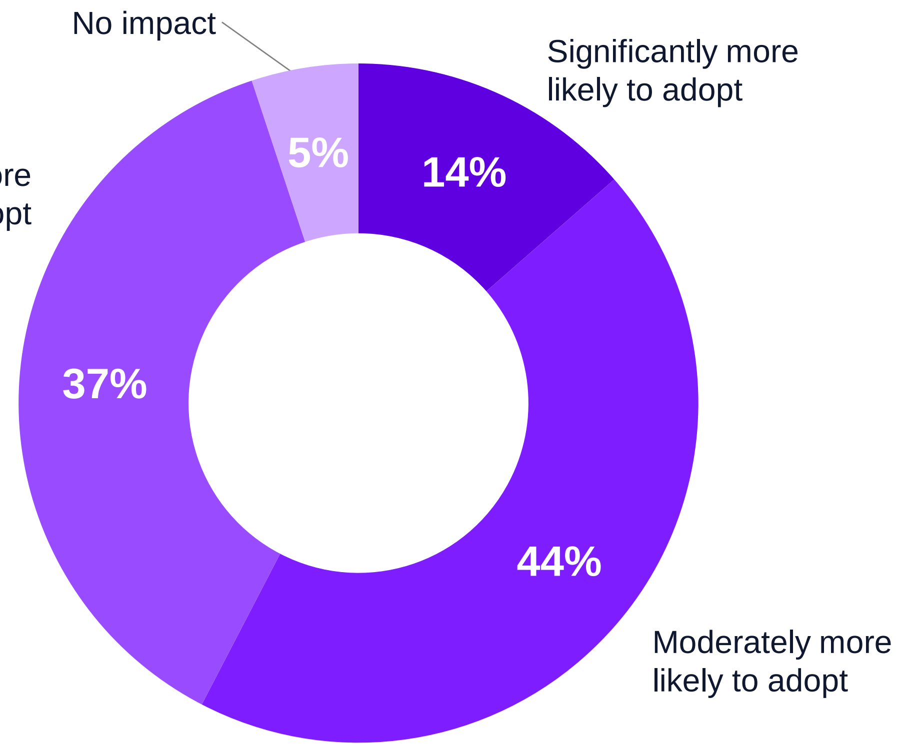
Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q17

Training and Device Information Preferences

Better training has some influence on likelihood to adopt devices, but ranges from slight to moderate decision impact for most physicians

Q: If training needs were better addressed, how would this impact your adoption of new medical devices?

Among those who rate past training as less than moderately effective

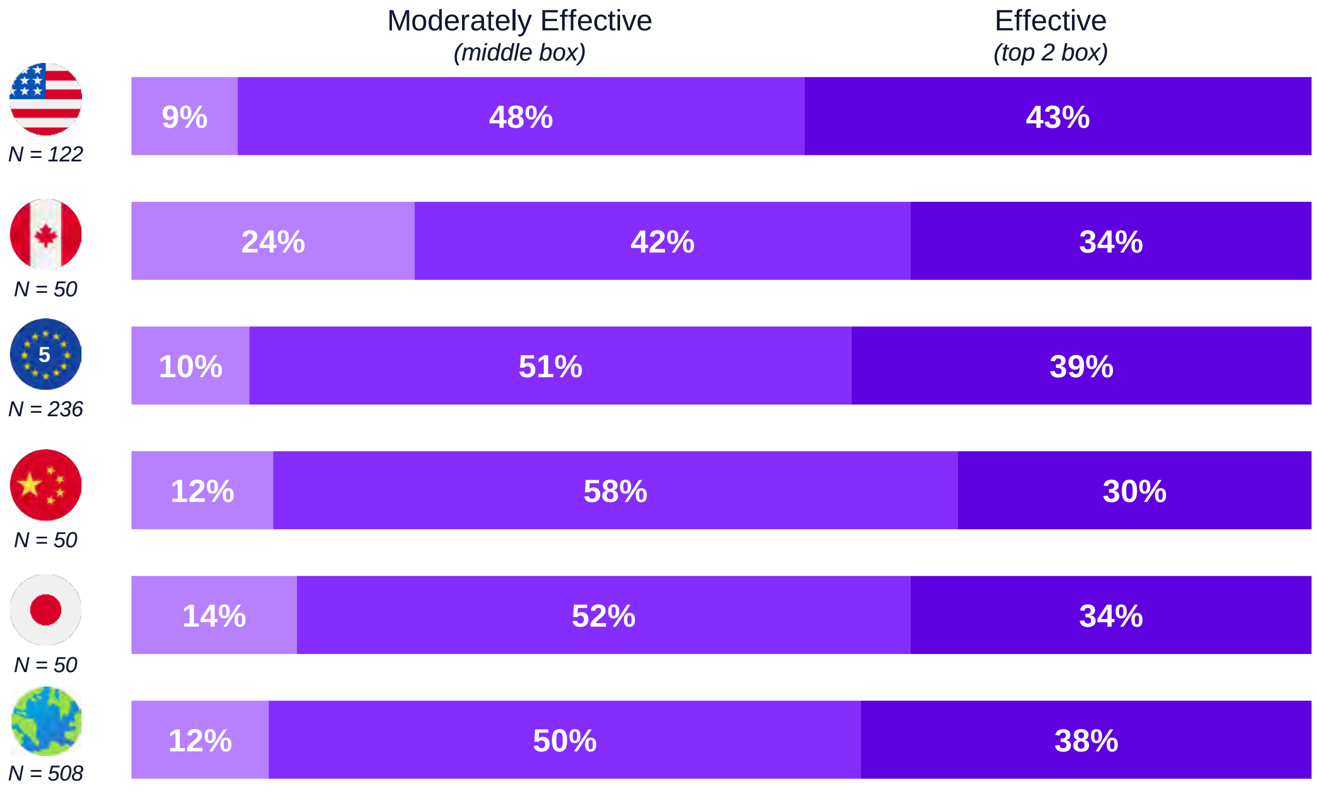


All countries
N = 59

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q10

HCPs are split between finding recent training programs highly and somewhat useful, with Canada being the only market that is notably critical

Q: On average, how effective would you rate past training programs provided by medical device companies?



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q7

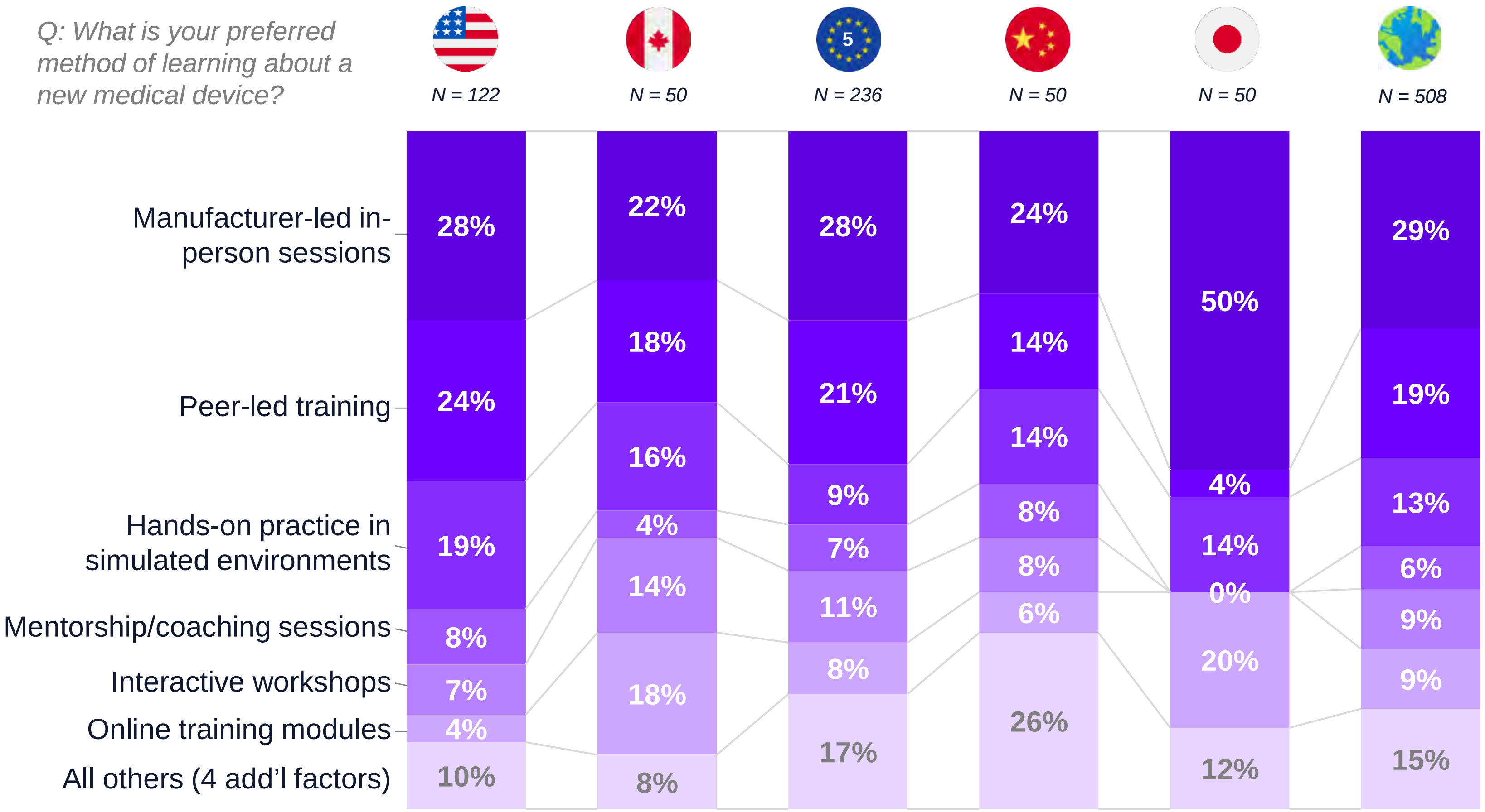
Time constraints and a lack of hands-on training opportunities are the greatest training barriers in all markets

Q: What challenges have you encountered with training or onboarding for new medical devices?
(top 5 shown)

	N = 122	N = 50	N = 236	N = 50	N = 50	N = 508
Time constraints for attending training	59%	64%	54%	48%	50%	55%
Limited opportunities for hands-on practice	46%	46%	33%	48%	52%	41%
Limited access to trainers	31%	30%	31%	22%	22%	29%
Lack of clear instructions or visual aids	20%	14%	24%	42%	24%	24%
High cost of training programs	20%	34%	25%	24%	8%	23%

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q8

HCPs in most markets are interested in a mix of different training environments



In most markets, **there is no one-size-fits all device training format**. HCPs are interested in manufacturer training, and a mix of other workshop types and sources.

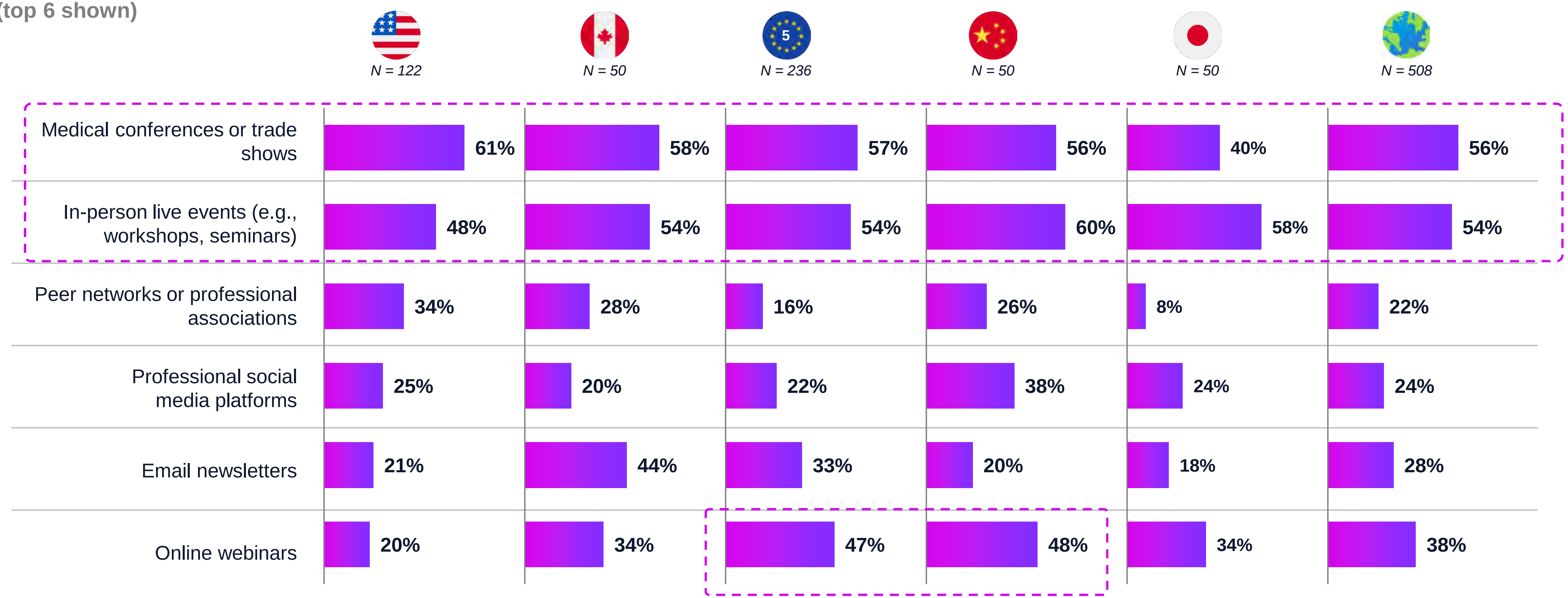
Japan is unique in having predominant interest in learning from **manufacturer in-person sessions**.

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q6

Conferences & in-person events are widely desired for device info, however those in the EU & China also have strong interest in online webinars

Q: Which communication channels do you prefer for staying informed about advancements in medical device technology?

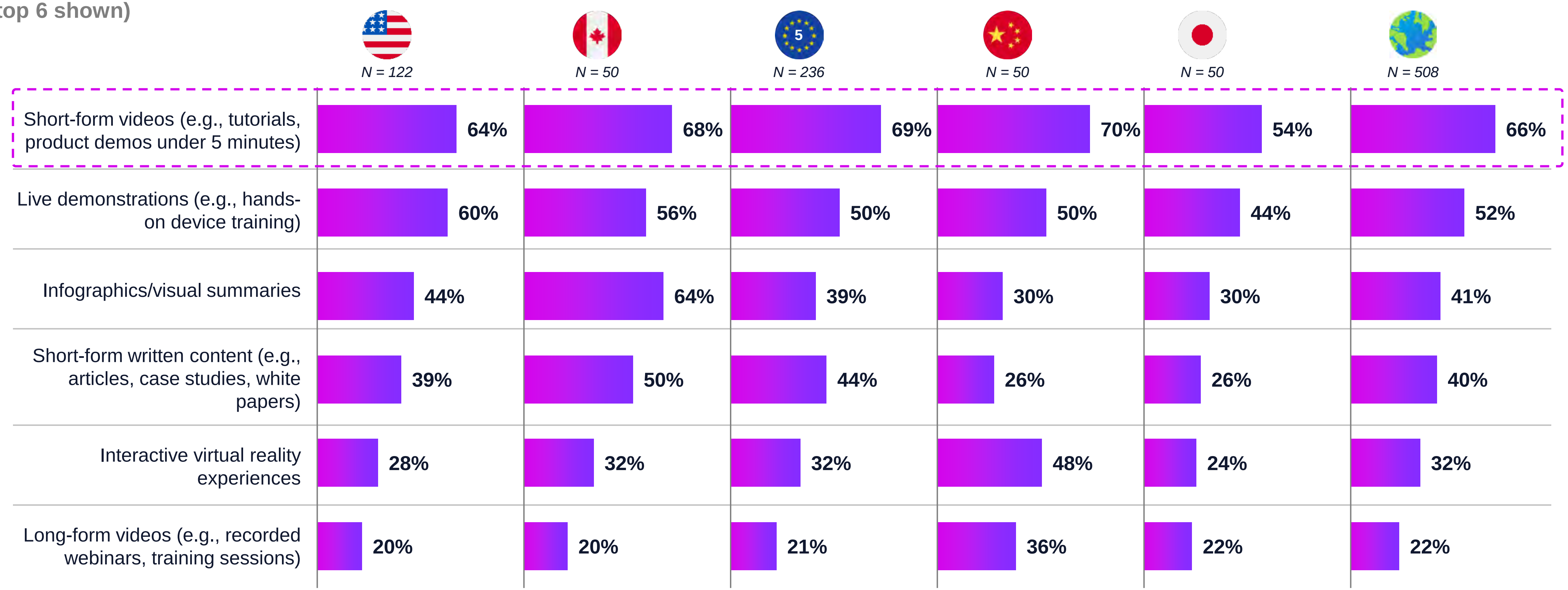
(top 6 shown)



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q22

Short-form videos are seen as the most effective medical device educational format across all markets

Q: What formats are most effective when learning about medical devices?
(top 6 shown)



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q23

Medical Device Product Needs

Improvements to UI, systems compatibility, and product durability are the most common desired features of new devices across markets

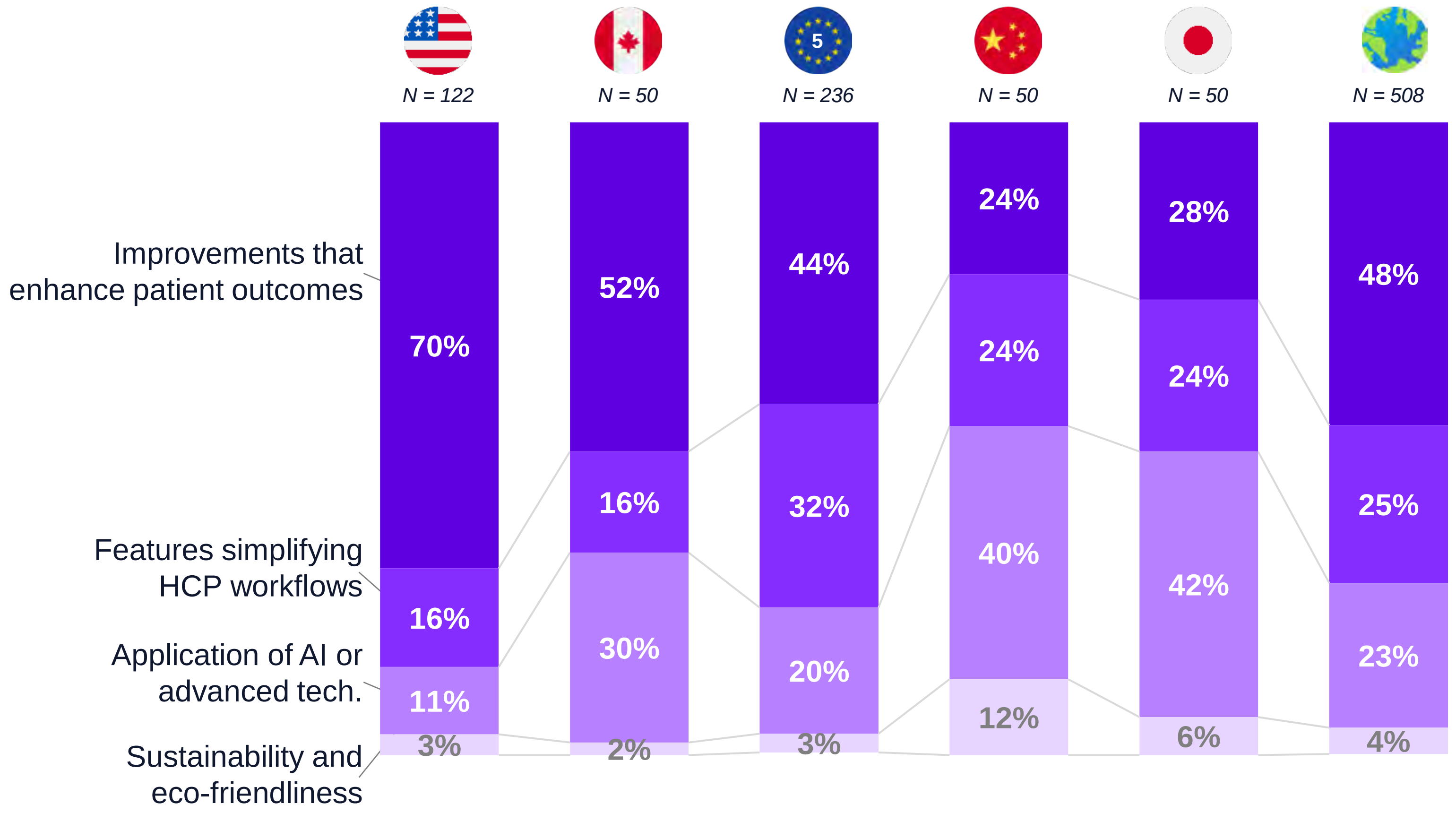
Q: What additional features or functionalities would make medical devices more effective for your practice?
(top 5 in each market)

	US (N = 122)	Canada (N = 50)	EU5 (N = 236)	China (N = 50)	Japan (N = 50)	Global (N = 508)
1	Improved user interfaces 52%	Existing system compatibility 58%	Existing system compatibility 50%	Existing system compatibility 56%	Durability and lifespan 42%	Existing system compatibility 51%
2	Existing system compatibility 51%	Customizable settings 48%	Durability and lifespan 50%	Durability and lifespan 46%	Existing system compatibility 40%	Durability and lifespan 46%
3	Durability and lifespan 43%	Improved user interfaces 48%	Improved user interfaces 42%	AI-driven insights for patient care 42%	Advanced data security features 34%	Improved user interfaces 43%
4	Seamless app integration 37%	Durability and lifespan 40%	Seamless app integration 34%	Real-time alerts and notifications 42%	Improved user interfaces 30%	Seamless app integration 34%
5	Remote monitoring 31%	Remote monitoring 40%	Remote monitoring 34%	Seamless app integration 40%	AI-driven insights for patient care 30%	AI-driven insights for patient care 33%

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q20

What innovation in devices means to HCPs varies across markets

Q: How do you define innovation in medical devices?



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q21

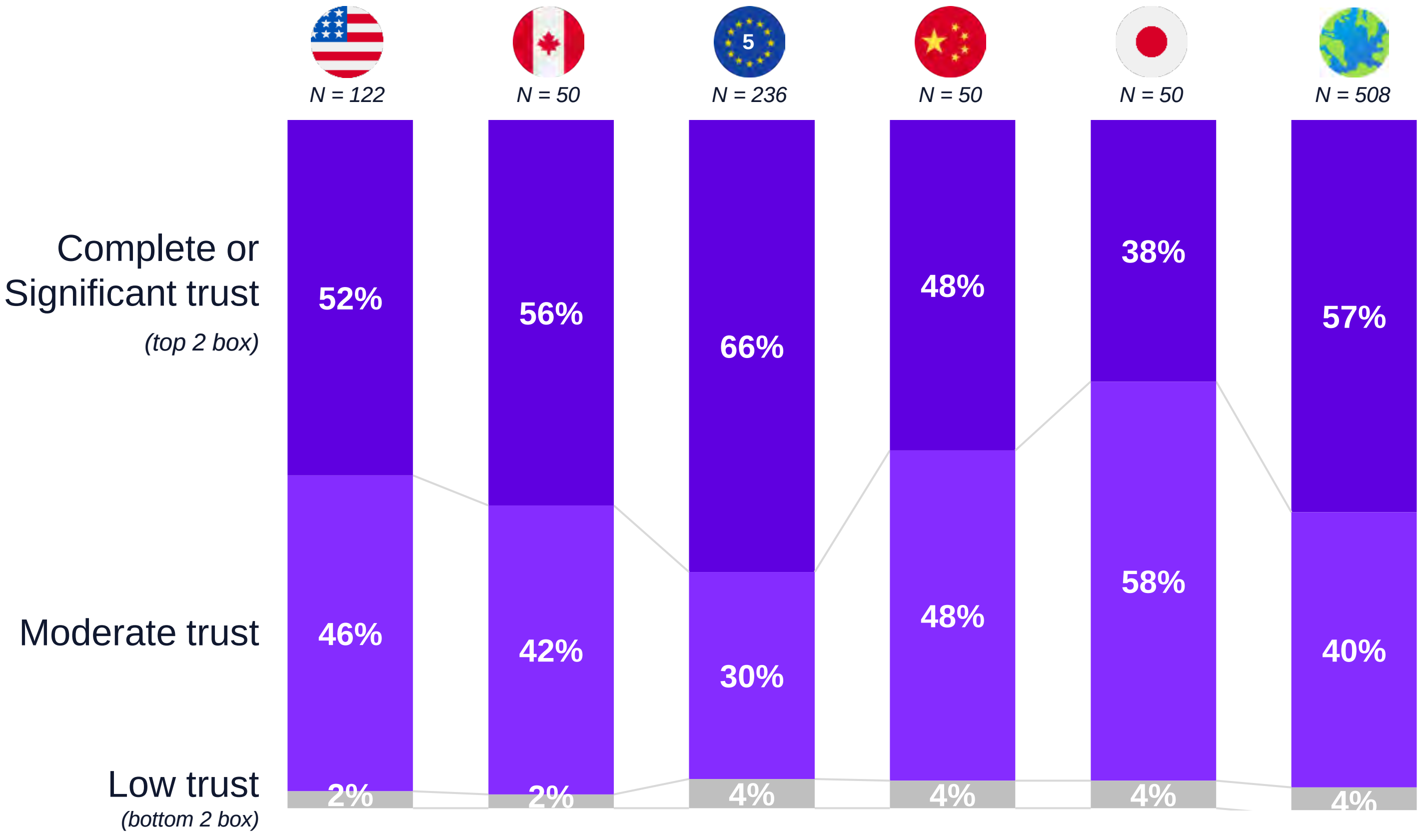
Patient outcome improvements are most defining of innovation, with workflow improvements and AI also playing a role

AI/Advanced tech are most defining of innovation

Device Manufacturer Trust & Perceptions

Medical device brands are viewed as highly trustworthy–particularly in the EU, Canada and US

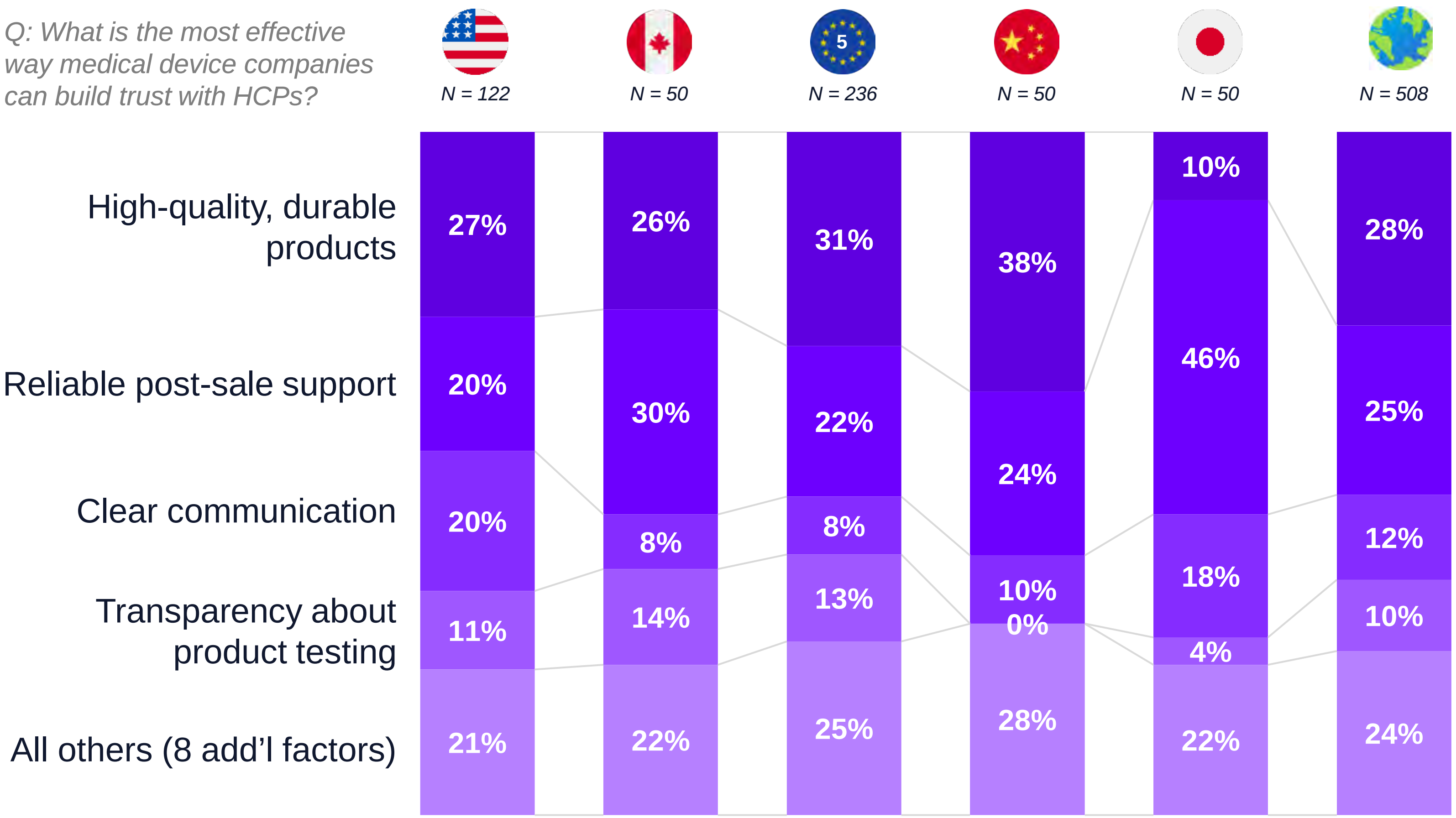
Q: How would you rate the trustworthiness of the medical device brands you currently work with?



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q11

Quality devices and support are the most effective trust-builders, in differing degrees across markets

Q: What is the most effective way medical device companies can build trust with HCPs?



A mix of **quality/durable devices + product support** are most likely to drive trust

Additionally, **clear comms**. (e.g., supporting claims) valued in US

Quality/durable devices stands out as the key trust driver

Post-sale support stands out as the key trust driver

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q12

Consistent tech support is the greatest unmet need in all markets

Q: Which aspects of your interactions with medical device companies do you believe need the most improvement?

(top 5 in each market)

	N = 122	N = 50	N = 236	N = 50	N = 50	N = 508
1	Ongoing tech support 46%	Ongoing tech support 60%	Ongoing tech support 49%	Ongoing tech support 70%	Ongoing tech support 50%	Ongoing tech support 52%
2	Training and education 39%	Training and education 40%	Training and education 42%	Timeliness of responses 50%	Timeliness of responses 44%	Training and education 39%
3	Pricing transparency 39%	Pricing transparency 38%	Ease of communication 35%	Quality of product info 46%	Ease of communication 36%	Ease of communication 34%
4	Availability of resources 34%	Personalized follow-up 30%	Personalized follow-up 34%	Ease of communication 38%	Flexibility in services 34%	Timeliness of responses 34%
5	Ease of communication 33%	Timeliness of responses 30%	Timeliness of responses 33%	Training and education 38%	Quality of product info 34%	Pricing transparency 32%

Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q15

In addition to tech support:

Also desire improvements to training and pricing transparency

5

Similarly seek training improvement, and easier + more personalized communication

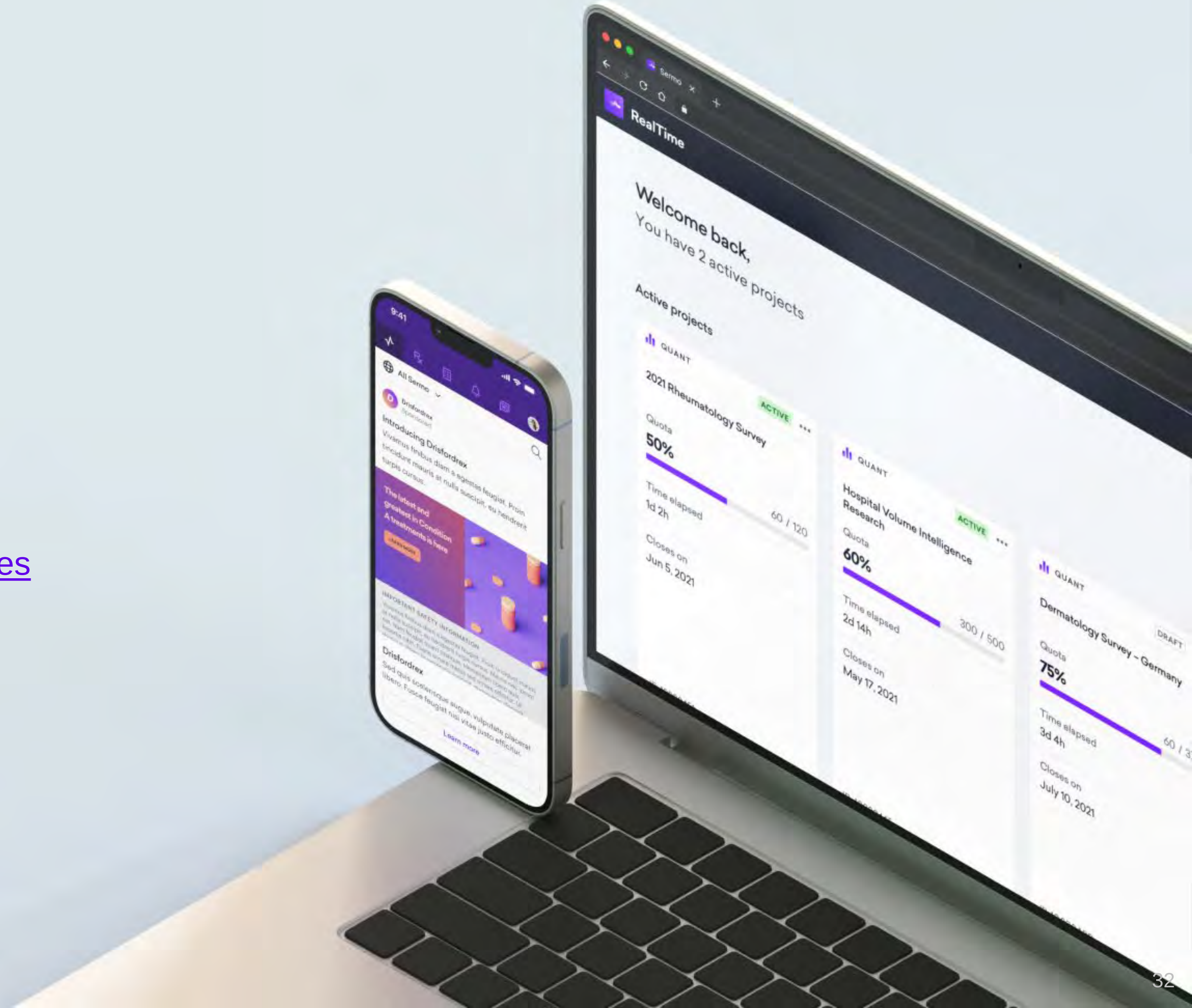
Desire more timely responses, improved product info quality, and easier communication

Thank you!

To learn how you can tap into Sermo’s global community of 1M+ HCPs to support your healthcare insights and engagement strategy, email us at business@sermo.com

For more HCP insights visit:

sermo.com/business/hcp-sentiment-study-series



Appendix

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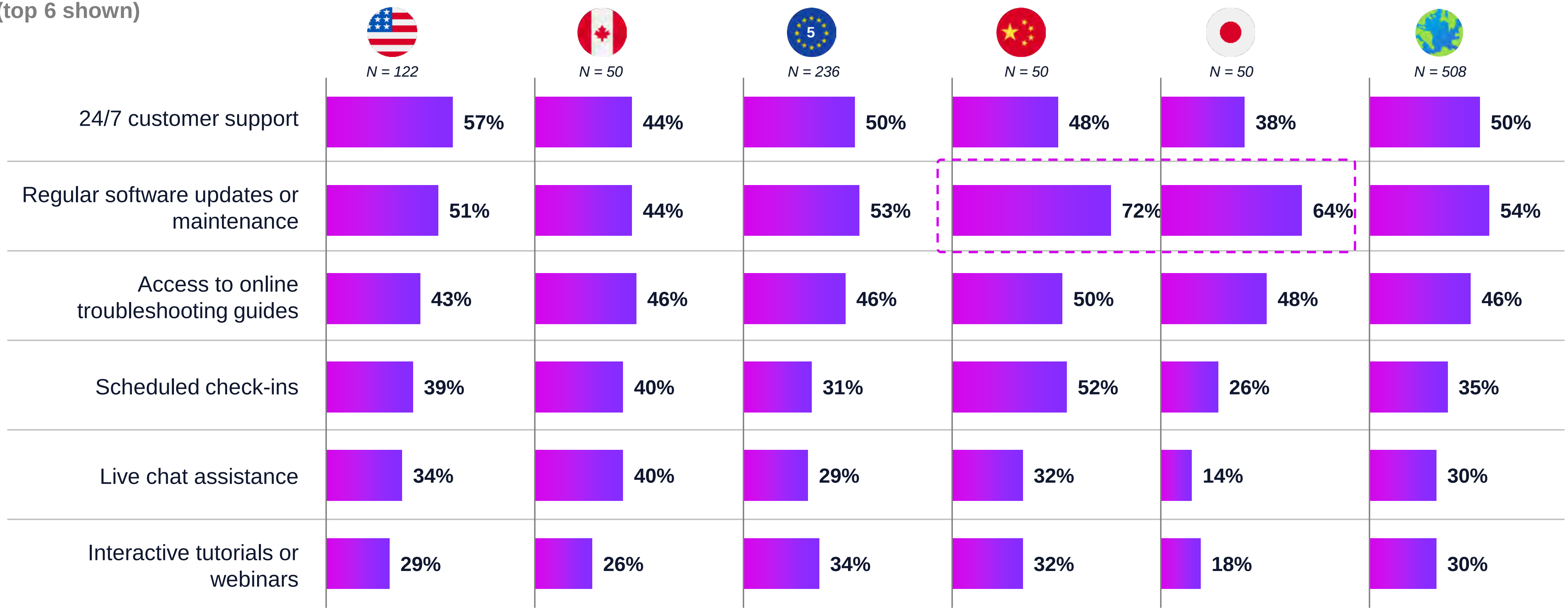
Regular maintenance and software updates are widely expected in China and Japan

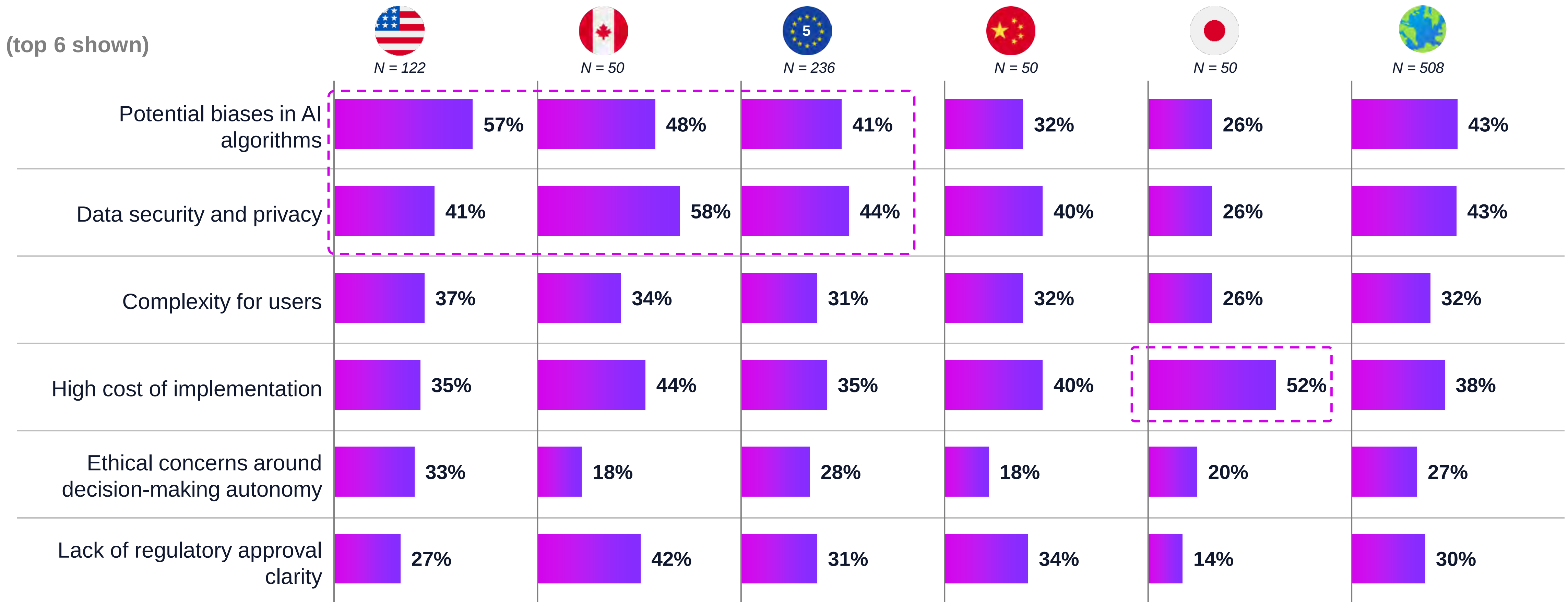
Q: What type of post-sale support do you expect from medical device companies?
(top 6 shown)



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q9

HCPs in the US, Canada, and EU have high concern with AI biases and data security, while those in Japan are more worried about costs

Q: What concerns, if any, do you have about adopting devices with AI or emerging technologies?



Source: RealTime HCP Sentiment 17 study, July 2025. N=508 physicians in North America, EU5 & APAC; Q18