



# Press Release

## Mixed global outlook on the future of healthcare

Ipsos *What the Future* report presents public opinion data on privacy, artificial intelligence, DNA kits and more

### Topline Results: Wave 1

1A. Are you currently covered by health insurance?

	<b>Total (n=1890)</b>
Yes	89%
No	11

1B. Which of the following types of health insurance plan(s) do you currently have?

	<b>Total (n=1679)</b>
A private health plan obtained through your employer or your spouse's employer	56%
Medicare, Medicaid, or other government-sponsored plan	33
A private health plan you purchased yourself directly from an insurance carrier or from a broker	9
A private health plan you purchased through the health care exchange	4
A military health plan or a plan for veterans	3
Other	4

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2. Imagine a cell phone that worked only when you ate well, exercised and took your medications on time and stopped working when you didn't follow the actions you are supposed to. This is designed to help you follow your plans for better health by "rewarding" you with access to your phone.

How interested would you be in having a phone like this?

	<b>Total (n=1890)</b>
Very interested	16%
Somewhat interested	35
Not very interested	22
Not at all interested	27
<b><i>Interested (Net)</i></b>	<b>51%</b>
<b><i>Not interested (Net)</i></b>	<b>49</b>

3. In order to standardize and prioritize the information given to your doctor prior to a visit or consultation, a new system of gathering information from patients is being developed that is based on computer programs. This system would ask you about the primary reason for the visit, along with any symptoms you are having, so the most important information can go to your doctor who can then decide on a treatment or next course of action.

What is your view of a computer-based system for gathering information from patients?

	<b>Total (n=1890)</b>
Very positive	30%
Somewhat positive	50
Somewhat negative	15
Very negative	5
<b><i>Positive (Net)</i></b>	<b>80%</b>
<b><i>Negative (Net)</i></b>	<b>20</b>

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4. Consumers increasingly have access to virtual health assistants, artificial intelligence that provides answers, reminders, and coaching, usually on apps or websites.

For each of the following topics, how likely are you to use a virtual health assistant?

a. Nutrition tracking/coaching

	<b>Total (n=1890)</b>
Definitely	19%
Very Probably	19
Probably	22
Possibly	21
Probably Not	13
Definitely Not	7
<b>Definitely/Very Probably</b>	<b>38%</b>
<b>Definitely Not/Probably Not</b>	<b>20</b>

b. Fitness tracking/coaching

	<b>Total (n=1890)</b>
Definitely	19%
Very Probably	18
Probably	22
Possibly	19
Probably Not	13
Definitely Not	8
<b>Definitely/Very Probably</b>	<b>37%</b>
<b>Definitely Not/Probably Not</b>	<b>21</b>

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c. Therapy for mental health

	<b>Total (n=1890)</b>
Definitely	9%
Very Probably	11
Probably	15
Possibly	21
Probably Not	26
Definitely Not	18
<b><i>Definitely/Very Probably</i></b>	<b>20%</b>
<b><i>Definitely Not/Probably Not</i></b>	<b>45</b>

d. Medication management

	<b>Total (n=1890)</b>
Definitely	15%
Very Probably	17
Probably	21
Possibly	23
Probably Not	16
Definitely Not	8
<b><i>Definitely/Very Probably</i></b>	<b>32%</b>
<b><i>Definitely Not/Probably Not</i></b>	<b>25</b>

e. Diagnosing medical conditions

	<b>Total (n=1890)</b>
Definitely	9%
Very Probably	14
Probably	21
Possibly	23
Probably Not	21
Definitely Not	13
<b><i>Definitely/Very Probably</i></b>	<b>23%</b>
<b><i>Definitely Not/Probably Not</i></b>	<b>33</b>

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f. Appointment booking

	<b>Total (n=1890)</b>
Definitely	31%
Very Probably	22
Probably	21
Possibly	16
Probably Not	7
Definitely Not	3
<b><i>Definitely/Very Probably</i></b>	<b>53%</b>
<b><i>Definitely Not/Probably Not</i></b>	<b>10</b>

g. Answering health questions

	<b>Total (n=1890)</b>
Definitely	18%
Very Probably	21
Probably	24
Possibly	22
Probably Not	10
Definitely Not	4
<b><i>Definitely/Very Probably</i></b>	<b>40%</b>
<b><i>Definitely Not/Probably Not</i></b>	<b>14</b>

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h. Personal health advice

	<b>Total (n=1890)</b>
Definitely	13%
Very Probably	18
Probably	23
Possibly	26
Probably Not	15
Definitely Not	6
<b>Definitely/Very Probably</b>	<b>31%</b>
<b>Definitely Not/Probably Not</b>	<b>21</b>

5. Of the following possible uses for wearables, which of the following possible uses for wearables do you think are MOST useful to you? Please select up to three responses.

	<b>Total (n=1890)</b>
Daily activity tracker (counting steps/distance/exercise levels)	52%
Heart-rate tracker	38
Calorie/intake tracker	36
Sleep pattern/quality tracker	33
Medication reminder	25
Fitness training/coaching	25
Motion detection (speed/direction/location)	9
Body temperature monitor	8
Do not think any of these are useful to me	14

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6. In order to ensure that everyone in the US is covered by adequate health insurance, how much extra per year would you be willing to pay?

	<b>Total (n=1890)</b>
Nothing	41%
Up to \$99	27
\$100 - \$199	13
\$200 - \$499	10
\$500 - \$999	4
\$1,000 - \$2,499	2
\$2,500 - \$4,999	1
\$5,000 or more	1

7. Many patients have access to their electronic medical records, but this information is often split across different health care systems. In the future, patients may be able to access **all** of their health data from one central location. With your permission, providers from any healthcare system could access your data. What is your view on this type of electronic medical record?

	<b>Total (n=1890)</b>
Very positive	39%
Somewhat positive	43
Somewhat negative	14
Very negative	5
<b>Positive (Net)</b>	<b>82%</b>
<b>Negative (Net)</b>	<b>18</b>

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## Topline Results: Wave 2

1. Are you currently covered by health insurance?

	<b>Total (n=2007)</b>
Yes	90%
No	10

2. Which of the following types of health insurance plan(s) do you currently have?

	<b>Total (n=1808)</b>
A plan obtained through your employer or your spouse's employer	57%
Medicare, Medicaid, or other government-sponsored plan	29
A plan you purchased yourself directly from an insurance carrier or from a broker	8
A plan you purchased through the health care exchange	6
A military health plan or a plan for veterans	3
Other	3

2B. And how would you describe your current health status?

	<b>Total (n=2007)</b>
Excellent	20%
Very good	39
Good	28
Fair	11
Poor	2
<b>Excellent/Very Good</b>	<b>59%</b>
<b>Fair/Poor</b>	<b>13</b>

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Q3. To what extent do you agree with the following statements: Please select one response for each statement

a. I want more time with my doctor when I have an appointment

	<b>Total (n=2007)</b>
Strongly agree	19%
Somewhat agree	32
Neither agree nor disagree	36
Somewhat disagree	9
Strongly disagree	3
<b>Agree (Net)</b>	<b>51%</b>
<b>Disagree (Net)</b>	<b>12</b>

b. I want my doctor to know how much treatments, tests and medications will cost before they are prescribed

	<b>Total (n=2007)</b>
Strongly agree	44%
Somewhat agree	35
Neither agree nor disagree	15
Somewhat disagree	4
Strongly disagree	2
<b>Agree (Net)</b>	<b>79%</b>
<b>Disagree (Net)</b>	<b>6</b>

c. I want my doctor to have access to all my medical records

	<b>Total (n=2007)</b>
Strongly agree	57%
Somewhat agree	30
Neither agree nor disagree	8
Somewhat disagree	3
Strongly disagree	2
<b>Agree (Net)</b>	<b>87%</b>
<b>Disagree (Net)</b>	<b>5</b>

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d. I trust my doctor to handle my medical data

	<b>Total (n=2007)</b>
Strongly agree	40%
Somewhat agree	43
Neither agree nor disagree	12
Somewhat disagree	3
Strongly disagree	2
<b>Agree (Net)</b>	<b>83%</b>
<b>Disagree (Net)</b>	<b>5</b>

e. I trust computer programs/artificial intelligence to handle my medical data

	<b>Total (n=2007)</b>
Strongly agree	8%
Somewhat agree	32
Neither agree nor disagree	28
Somewhat disagree	22
Strongly disagree	11
<b>Agree (Net)</b>	<b>39%</b>
<b>Disagree (Net)</b>	<b>32</b>

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4. Your personal medical data may include things like immunization records, disease history, prescription records, genetic data, readings from wearable devices like step-counters or blood sugar monitors – essentially all of the data your doctor or other health care providers have. Assuming you could share this data without your name or other identifiable information, how much do you agree with the following statements:

- a. I would share this data with academic/non-profit researchers developing better treatments or cures for diseases

	<b>Total (n=2007)</b>
Strongly agree	22%
Somewhat agree	36
Neither agree nor disagree	22
Somewhat disagree	13
Strongly disagree	8
<b>Agree (Net)</b>	<b>57%</b>
<b>Disagree (Net)</b>	<b>21</b>

- b. I would share this data with corporate researchers developing better treatments or cures for diseases

	<b>Total (n=2007)</b>
Strongly agree	18%
Somewhat agree	34
Neither agree nor disagree	24
Somewhat disagree	14
Strongly disagree	10
<b>Agree (Net)</b>	<b>52%</b>
<b>Disagree (Net)</b>	<b>24</b>

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c. I would share this data with insurance companies

	<b>Total (n=2007)</b>
Strongly agree	12%
Somewhat agree	25
Neither agree nor disagree	27
Somewhat disagree	21
Strongly disagree	16
<b>Agree (Net)</b>	<b>37%</b>
<b>Disagree (Net)</b>	<b>37</b>

d. I trust that my privacy would be protected

	<b>Total (n=2007)</b>
Strongly agree	19%
Somewhat agree	35
Neither agree nor disagree	22
Somewhat disagree	15
Strongly disagree	8
<b>Agree (Net)</b>	<b>55%</b>
<b>Disagree (Net)</b>	<b>23</b>

e. I would share this information with organ/tissue/bone marrow donor programs

	<b>Total (n=2007)</b>
Strongly agree	23%
Somewhat agree	36
Neither agree nor disagree	24
Somewhat disagree	10
Strongly disagree	7
<b>Agree (Net)</b>	<b>59%</b>
<b>Disagree (Net)</b>	<b>17</b>

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5: To what extent are you concerned about:

a. Companies marketing to you based on your genetics

	<b>Total (n=2007)</b>
Extremely concerned – 5	29%
4	23
3	27
2	11
Not at all concerned – 1	10
<b>Top 2 Box</b>	<b>53%</b>
<b>Bottom 2 Box</b>	<b>20</b>

b. Insurance determining coverage based on your genetics

	<b>Total (n=2007)</b>
Extremely concerned – 5	42%
4	23
3	21
2	7
Not at all concerned – 1	7
<b>Top 2 Box</b>	<b>65%</b>
<b>Bottom 2 Box</b>	<b>14</b>

c. Identity theft

	<b>Total (n=2007)</b>
Extremely concerned – 5	43%
4	26
3	20
2	7
Not at all concerned – 1	5
<b>Top 2 Box</b>	<b>69%</b>
<b>Bottom 2 Box</b>	<b>11</b>

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d. Having your genetic information shared with 3<sup>rd</sup> parties

	<b>Total (n=2007)</b>
Extremely concerned – 5	36%
4	24
3	21
2	10
Not at all concerned – 1	9
<b>Top 2 Box</b>	<b>61%</b>
<b>Bottom 2 Box</b>	<b>18</b>

e. Having your genetic information stolen by hackers

	<b>Total (n=2007)</b>
Extremely concerned – 5	36%
4	23
3	20
2	11
Not at all concerned – 1	10
<b>Top 2 Box</b>	<b>59%</b>
<b>Bottom 2 Box</b>	<b>21</b>

f. The implications of you submitting your DNA for the privacy of your past, present and future family members who share the same DNA

	<b>Total (n=2007)</b>
Extremely concerned – 5	24%
4	22
3	34
2	10
Not at all concerned – 1	10
<b>Top 2 Box</b>	<b>46%</b>
<b>Bottom 2 Box</b>	<b>20</b>

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Q6: How likely are you to use one of these DNA testing services?

	<b>Total (n=2007)</b>
I have already used one	10%
Very Likely	11
Somewhat likely	15
Might or might not	19
Somewhat unlikely	16
Very unlikely	28
<b>Very/somewhat likely</b>	<b>26%</b>
<b>Very/ somewhat unlikely</b>	<b>45</b>

Q7. Which personal benefits of the DNA testing service are/were you most interested in?

	<b>Total (n=694)</b>
Identifying ancestral lineage	72%
Identifying health risks	49
Identifying racial lineage	45
Finding lost parents or relations	17
Finding birth parents for adoptees	6
Finding unknown parents	6
Other	3

Q8. In addition to benefits to you personally, DNA testing services may also offer benefits to society at large. Of the following potential societal benefits of DNA testing, which are you most interested in?

	<b>Total (n=694)</b>
Pharmaceutical drug development for better disease treatments or cures	55%
Identifying perpetrators of crimes	43
Identifying Jane/John Doe bodies	41
I'm not interested in any of these	20
Marketing consumer products and medicines	17
Other	4

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Q9: Now, please think of the average lifespan of the richest Americans compared to the poorest Americans.

	<b>Total (n=2007)</b>
Poorest 20% lives 10 or more years longer than the richest 20%	4%
Poorest 20% lives 5 - 9 years longer than the richest 20%	3
Poorest 20% lives 1 - 4 years longer than the richest 20%	3
No difference in lifespan	22
Richest 20% lives 1 - 4 years longer than the poorest 20%	11
Richest 20% lives 5 - 9 years longer than the poorest 20%	28
Richest 20% lives 10 or more years longer than the poorest 20%	29

10A. Please rank the following factors based on how important you think they are to your personal health. Please use "1" for the most important factor and "9" for the least important factor. You may use each number only once.

a. Your doctor

	<b>Total (n=1007)</b>
1	5%
2	5
3	8
4	9
5	16
6	18
7	18
8	16
9	6

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b. Your genes

	<b>Total (n=1007)</b>
1	30%
2	13
3	17
4	12
5	8
6	6
7	6
8	5
9	3

c. Where you live

	<b>Total (n=1007)</b>
1	4%
2	8
3	9
4	11
5	18
6	16
7	16
8	12
9	5

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d. What you eat

	<b>Total (n=1007)</b>
1	27%
2	25
3	16
4	10
5	7
6	4
7	4
8	3
9	2

e. How much you exercise

	<b>Total (n=1007)</b>
1	9%
2	23
3	18
4	17
5	11
6	8
7	6
8	5
9	3

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f. National political decisions

	<b>Total (n=1007)</b>
1	3%
2	1
3	3
4	3
5	3
6	5
7	5
8	12
9	64

g. Your income/socio-economic status

	<b>Total (n=1007)</b>
1	7%
2	6
3	8
4	11
5	12
6	16
7	18
8	17
9	5

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## h. Your parents' health

	<b>Total (n=1007)</b>
1	8%
2	13
3	13
4	19
5	15
6	10
7	9
8	9
9	4

## i. Your health insurance status

	<b>Total (n=1007)</b>
1	6%
2	6
3	8
4	8
5	11
6	17
7	17
8	19
9	8

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Q11. [IF Q2b = EXCELLENT OR VERY GOOD OR GOOD, ASK: For each of the following technologies, please indicate how much you agree or disagree that the technology would help you provide care to a family member who needs caregiving assistance.]

[IF Q2b = FAIR OR POOR, ASK: For each of the following technologies, please indicate how much you agree or disagree that the technology would be helpful to you.]

- a. Transportation/ride-share services with a driver such as Uber or Lyft

	<b>Total (n=274)</b>
Strongly agree	13%
Somewhat agree	36
Somewhat disagree	30
Strongly disagree	21
<b>Agree (Net)</b>	<b>49%</b>
<b>Disagree (Net)</b>	<b>51</b>

- b. Self-driving ride-share services when they become available in the next several years

	<b>Total (n=1808)</b>
Strongly agree	8%
Somewhat agree	29
Somewhat disagree	33
Strongly disagree	31
<b>Agree (Net)</b>	<b>37%</b>
<b>Disagree (Net)</b>	<b>63</b>

- c. Home automation features like smart appliances and thermostats that can be monitored and controlled remotely if needed

	<b>Total (n=1808)</b>
Strongly agree	20%
Somewhat agree	46
Somewhat disagree	21
Strongly disagree	14
<b>Agree (Net)</b>	<b>65%</b>
<b>Disagree (Net)</b>	<b>35</b>

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d. Security monitoring services with cameras and sensors

	<b>Total (n=1808)</b>
Strongly agree	22%
Somewhat agree	44
Somewhat disagree	22
Strongly disagree	12
<b>Agree (Net)</b>	<b>67%</b>
<b>Disagree (Net)</b>	<b>33</b>

e. Devices that monitor physical conditions such as heartrate, blood pressure, blood sugar, etc.

	<b>Total (n=1808)</b>
Strongly agree	41%
Somewhat agree	47
Somewhat disagree	8
Strongly disagree	4
<b>Agree (Net)</b>	<b>88%</b>
<b>Disagree (Net)</b>	<b>12</b>

f. Communication technologies such as video calling and intelligent voice automation

	<b>Total (n=1808)</b>
Strongly agree	16%
Somewhat agree	48
Somewhat disagree	29
Strongly disagree	7
<b>Agree (Net)</b>	<b>64%</b>
<b>Disagree (Net)</b>	<b>36</b>

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Q12. And of this same list of technologies, please indicate how much you agree or disagree that this technology would be easy for you to use.

a. Transportation/ride-share services with a driver such as Uber or Lyft

	<b>Total (n=2007)</b>
Strongly agree	32%
Somewhat agree	44
Somewhat disagree	17
Strongly disagree	7
<b>Agree (Net)</b>	<b>76%</b>
<b>Disagree (Net)</b>	<b>24</b>

b. Self-driving ride-share services when they become available in the next several years

	<b>Total (n=2007)</b>
Strongly agree	19%
Somewhat agree	38
Somewhat disagree	28
Strongly disagree	15
<b>Agree (Net)</b>	<b>57%</b>
<b>Disagree (Net)</b>	<b>43</b>

c. Home automation features like smart appliances and thermostats that can be monitored and controlled remotely if needed

	<b>Total (n=2007)</b>
Strongly agree	33%
Somewhat agree	47
Somewhat disagree	16
Strongly disagree	4
<b>Agree (Net)</b>	<b>80%</b>
<b>Disagree (Net)</b>	<b>20</b>

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d. Security monitoring services with cameras and sensors

	<b>Total (n=2007)</b>
Strongly agree	35%
Somewhat agree	50
Somewhat disagree	12
Strongly disagree	3
<b>Agree (Net)</b>	<b>85%</b>
<b>Disagree (Net)</b>	<b>15</b>

e. Devices that monitor physical conditions such as heartrate, blood pressure, blood sugar, etc.

	<b>Total (n=2007)</b>
Strongly agree	42%
Somewhat agree	49
Somewhat disagree	7
Strongly disagree	2
<b>Agree (Net)</b>	<b>91%</b>
<b>Disagree (Net)</b>	<b>9</b>

f. Communication technologies such as video calling and intelligent voice automation

	<b>Total (n=2007)</b>
Strongly agree	35%
Somewhat agree	47
Somewhat disagree	14
Strongly disagree	4
<b>Agree (Net)</b>	<b>82%</b>
<b>Disagree (Net)</b>	<b>18</b>

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Q13: To what extent do you agree with the following statement: The Health care system in the U.S. is easy to understand and navigate

	<b>Total (n=2007)</b>
Strongly agree	5%
Somewhat agree	12
Neither agree nor disagree	18
Somewhat disagree	31
Strongly disagree	34
<b>Agree (Net)</b>	<b>17%</b>
<b>Disagree (Net)</b>	<b>65</b>

Q14: If a service existed that would allow you to receive assistance, either from a person or a computer program, in navigating the health care system – from selecting doctors and facilities, to arranging appointments, to ensuring timely patient/caregiver communication, to working with the insurance companies – how interested would you be in that service?

	<b>Total (n=2007)</b>
Extremely – 5	20%
4	29
3	36
2	8
Not interested at all – 1	7
<b>Top 2 Box</b>	<b>50%</b>
<b>Bottom 2 Box</b>	<b>15</b>

Q15: If such a service existed, who would you most trust to provide that service?

	<b>Total (n=2007)</b>
Your doctor/primary care physician	45%
A non-profit organization	20
Your insurance company	12
Your hospital	8
A for-profit company	4
None of these	12

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Q16: If many of these services to help understand the healthcare system could be performed by a computer application how likely would you be to utilize that service?

	<b>Total (n=2007)</b>
Very likely	16%
Somewhat likely	28
Might or might not	39
Somewhat unlikely	10
Very unlikely	8
<b>Very/somewhat likely</b>	<b>43%</b>
<b>Very/somewhat unlikely</b>	<b>18</b>

Q17: To what extent do you feel like you have opportunity to provide customer feedback to your...

a. Primary care physician

	<b>Total (n=2007)</b>
Have enough opportunity to provide feedback	51%
Have some, but not enough opportunity to provide feedback	36
Don't have any opportunity to give feedback	14

b. Hospital or clinic

	<b>Total (n=2007)</b>
Have enough opportunity to provide feedback	35%
Have some, but not enough opportunity to provide feedback	46
Don't have any opportunity to give feedback	20

c. Specialist doctors or caregivers

	<b>Total (n=2007)</b>
Have enough opportunity to provide feedback	39%
Have some, but not enough opportunity to provide feedback	43
Don't have any opportunity to give feedback	18

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d. Insurance company

	<b>Total (n=2007)</b>
Have enough opportunity to provide feedback	24%
Have some, but not enough opportunity to provide feedback	39
Don't have any opportunity to give feedback	38

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