MORNING CONSULT

TOIOOOOJIJJOJ

ARTIFICIAL INTELLIGENCE IN HEALTHCARE & WEARABLE TECHNOLOGY

Survey Results for Advanced Medical Technology Association 105000005505555

JUNE 2023

1000**1111**1111001111110000

0011111010010010010010010

KEY FINDINGS

- 1. Four-in-five (81%) adults say medical devices have an impact on the health and well-being of people today, down slightly from March 2023. Three-in-four adults say research universities (76%), the medical device industry (76%), and hospital systems (76%) are responsible for advancements in today's healthcare system, down slightly from March 2023.
- 2. Awareness of AI does not translate to the knowledgeability of AI. Half (48%) of adults say they have seen, read, or heard some or a lot about artificial intelligence in the healthcare industry, but fewer adults (36%) say they feel knowledgeable about the role of artificial intelligence in healthcare.
- 3. Adults' perspectives on the use of artificial intelligence in healthcare are mixed. While a plurality (44%) of adults say artificial intelligence has a mostly positive impact on the healthcare industry, a quarter of adults say they feel skeptical (26%), uncertain (25%), and hopeful (24%) about the use of artificial intelligence in healthcare.
- 4. Nearly all current wearable health monitor users say they are satisfied (95%) with their monitor. A majority of current health monitor users say they use their monitor(s) to track physical activity (73%) and to monitor their heart rate (65%).
- 5. Adults say ease of use (58%) and affordability (57%) would be very important if they were looking to purchase a wearable health monitor.

AGENDA

TRACKING: MEDICAL TECHNOLOGY

ARTIFICIAL INTELLIGENCE IN HEALTHCARE

WEARABLE HEALTH MONITORS

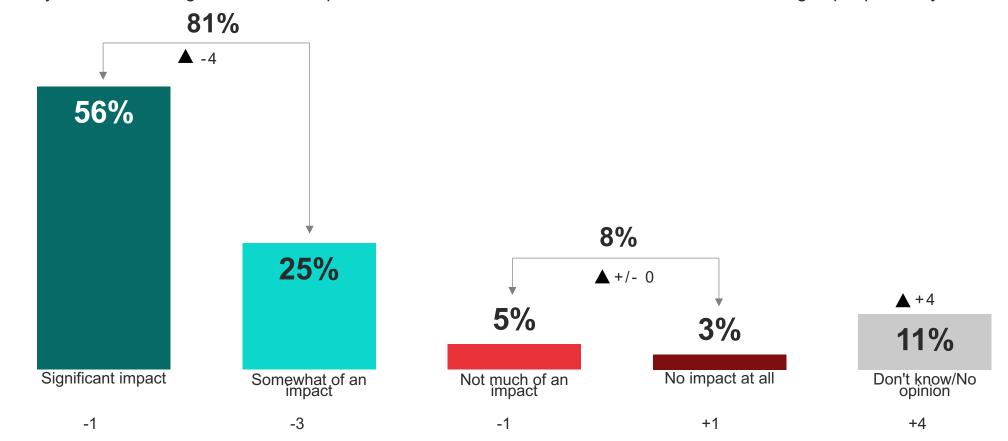


March

2023

Four-in-five (81%) adults say medical devices have an impact on the health and well-being of people today, down slightly from March 2023.

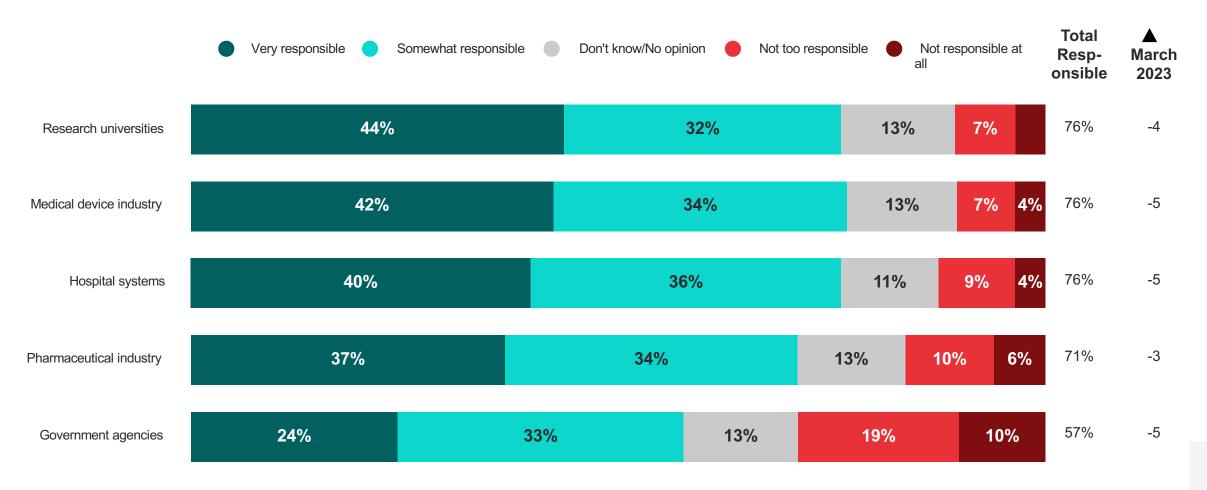
As you may know, medical technology can be defined as the technologies that diagnose, treat and/or improve a person's health and wellbeing. Medical devices specifically achieve their purpose by a physical or mechanical action. Medical technology and devices encompass the basics, including tongue depressors and bandages, to the complex, including pacemakers and MRI machines. Based on what you know, how significant of an impact do medical devices have on the health and well being of people today?



TRACKING: MEDICAL TECHNOLOGY

Three-in-four adults say research universities (76%), the medical device industry (76%), and hospital systems (76%) are responsible for advancements in today's healthcare system, down slightly from March 2023.

Based on what you know, how responsible are each of the following, if at all, for advancements in today's healthcare system?



AGENDA

TRACKING: MEDICAL TECHNOLOGY

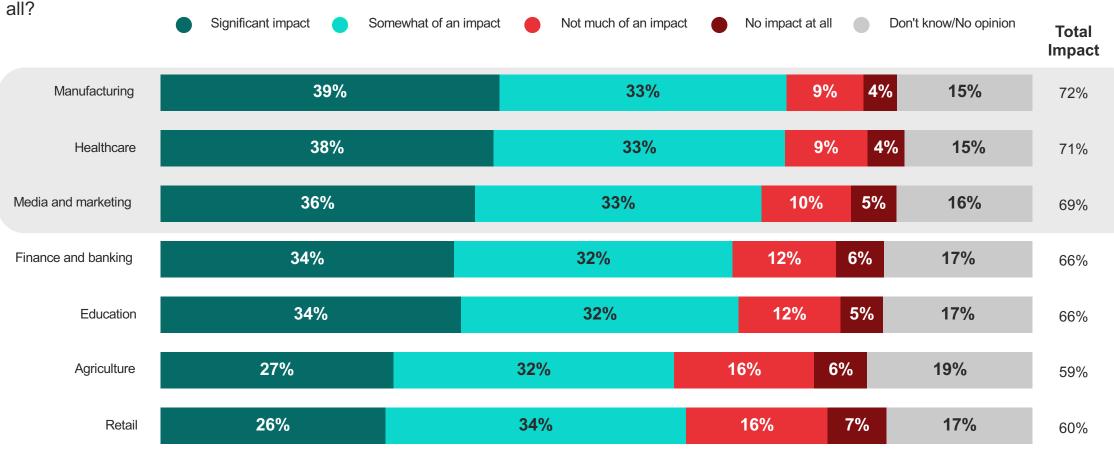
ARTIFICIAL INTELLIGENCE IN HEALTHCARE

WEARABLE HEALTH MONITORS



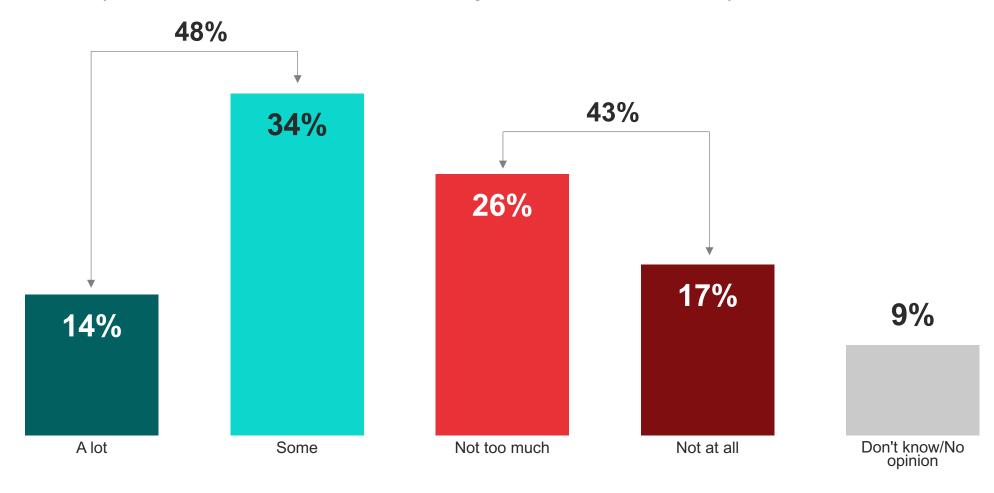
Adults say artificial intelligence has an impact on the manufacturing (72%), healthcare (71%) and media and marketing (69%) industries.

As you may know, artificial intelligence (AI) makes it possible for machines to learn from experience, adjust to new inputs and perform human-like tasks. In your opinion, how significant of an impact does artificial intelligence have on each of the following industries, if at all?



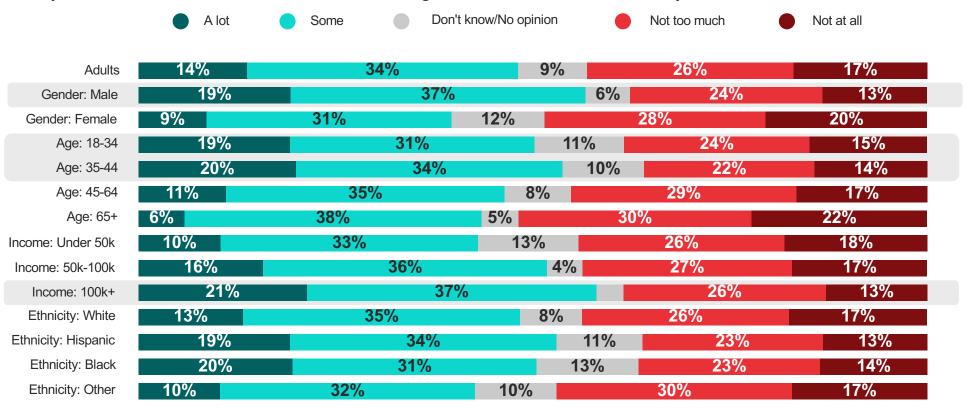
Half (48%) of adults say they have seen, read, or heard *some* or *a lot* about artificial intelligence in the healthcare industry, while 43% say they have not.

How much have you seen, read, or heard about artificial intelligence in the healthcare industry?



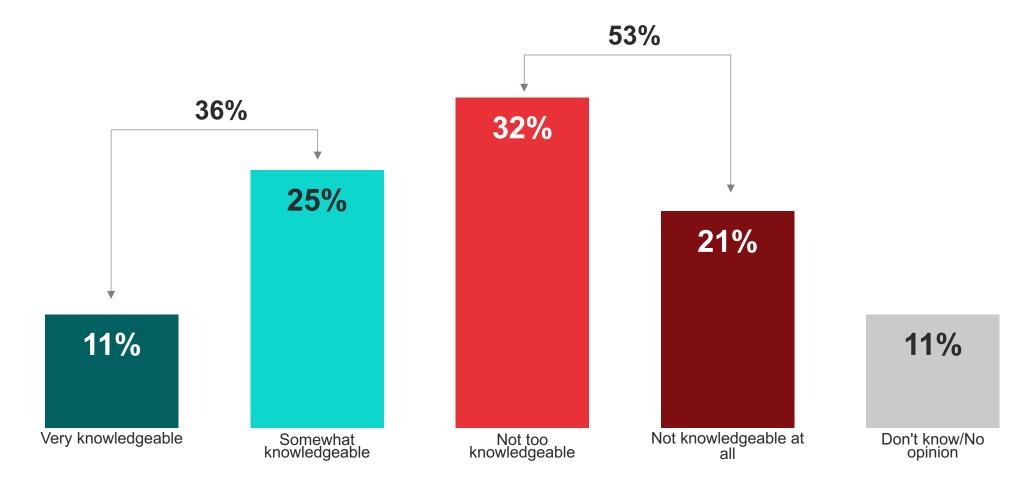
Men, younger adults, and higher-income adults are especially likely to say they have seen, read, or heard *some* or *a lot* about artificial intelligence in the healthcare industry.

How much have you seen, read, or heard about artificial intelligence in the healthcare industry?



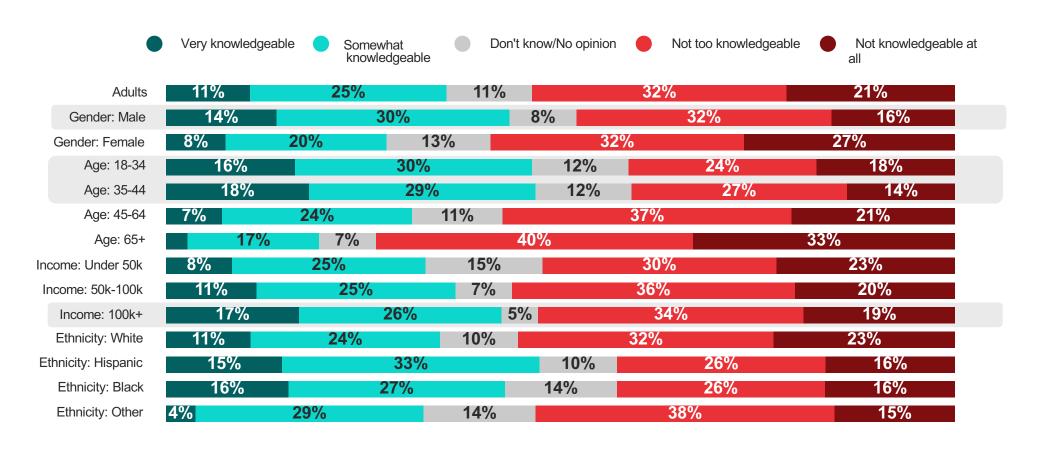
However, only 36% of adults say they feel knowledgeable about the role of artificial intelligence in the healthcare industry.

How knowledgeable do you feel, if at all, about the role of artificial intelligence in the healthcare industry?



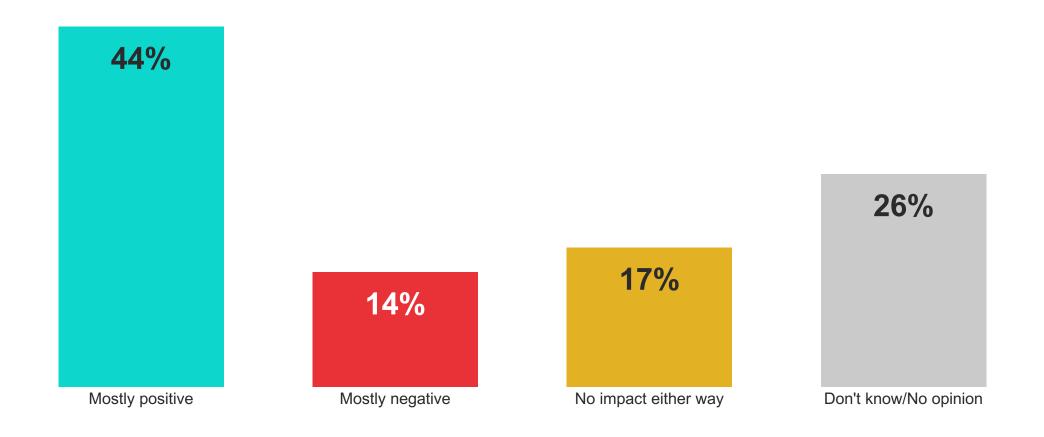
Again, men, younger adults, and higher-income adults are especially likely to say they feel knowledgeable about artificial intelligence in the healthcare industry.

How knowledgeable do you feel, if at all, about the role of artificial intelligence in the healthcare industry?



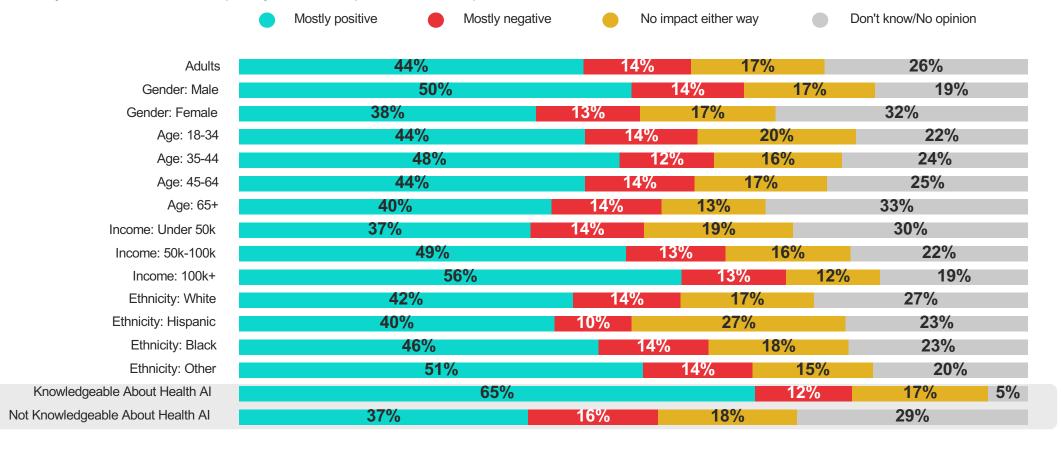
A plurality (44%) of adults say artificial intelligence has a mostly positive impact on the healthcare industry.

Based on what you know, would you say artificial intelligence has a mostly positive or mostly negative impact on the healthcare industry? This can include quality of life for providers and patients, efficiencies, etc.



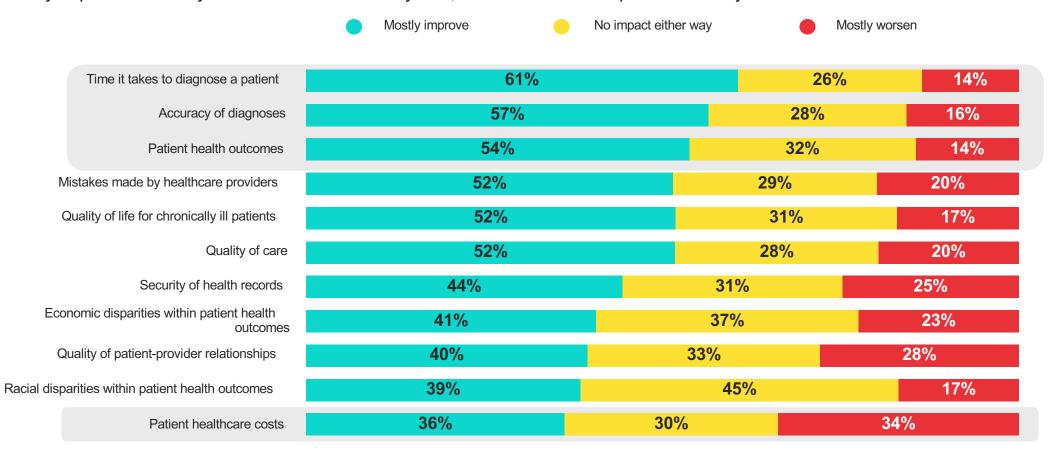
Adults who are knowledgeable about A.I. in healthcare are more likely to say artificial intelligence has a mostly positive impact on the healthcare industry compared to less knowledgeable adults, indicating room to improve awareness about A.I.'s role in healthcare.

Based on what you know, would you say artificial intelligence has a mostly positive or mostly negative impact on the healthcare industry? This can include quality of life for providers and patients, efficiencies, etc.



A majority of adults say artificial intelligence will mostly improve the time it takes to diagnose a patient (61%), the accuracy of diagnoses (57%), and patient health outcomes (54%). However, 34% of adults also believe that it will mostly worsen patients' healthcare costs.

As you may know, artificial intelligence can be used in the healthcare industry by way of training providers, scheduling, disease detection and diagnosis. Thinking about the use of artificial intelligence in the healthcare industry, do you think each of the following will mostly improve or mostly worsen over the next 5 years, or will it have no impact either way?



A quarter of adults feel skeptical (26%), uncertain (25%) and hopeful (24%) about the use of artificial intelligence in healthcare. Feelings vary across age and income levels.

Which of the following best describes how you feel about the use of artificial intelligence in healthcare? Please select up to two responses.

Not Knowledg- Knowledg- able

	Adults	Gender: Male	Gender: Female	Age: 18-34	Age: 35-44	Age: 45-64	Age: 65+	Income: Under 50k	Income: 50k-100k	Income: 100k+	About Health Al	About Health Al
Excited	12%	15%	8%	16%	14%	10%	5%	10%	11%	16%	19%	7%
Ambivalent	4%	4%	4%	3%	3%	4%	6%	4%	3%	5%	4%	5%
Anxious	12%	10%	14%	14%	14%	11%	10%	13%	10%	12%	14%	12%
Skeptical	26%	24%	28%	23%	27%	24%	33%	27%	27%	22%	18%	33%
Hopeful	24%	27%	20%	23%	24%	24%	24%	20%	26%	32%	30%	22%
Optimistic	19%	21%	17%	18%	19%	21%	19%	16%	22%	24%	28%	17%
Uncertain	25%	23%	28%	20%	23%	28%	30%	26%	26%	22%	16%	31%
Curious	17%	17%	18%	20%	15%	17%	16%	17%	19%	15%	17%	19%
Scared	11%	10%	13%	9%	10%	10%	17%	13%	10%	9%	9%	14%
Confused	7%	5%	8%	7%	6%	6%	8%	7%	7%	5%	4%	8%
Confident	9%	11%	8%	10%	12%	11%	4%	9%	9%	10%	17%	5%
Other, please specify:	1%	1%	1%	1%	1%	1%	0%	0%	0%	1%	1%	0%
None of the above	6%	5%	7%	9%	5%	5%	4%	9%	3%	3%	2%	3%

- Men, younger adults, and higher income adults are more likely than their counterparts to say they feel excited about the use of artificial intelligence in healthcare.
- Adults who say they are knowledgeable about the use of artificial intelligence in healthcare are more likely than their counterparts to say they feel hopeful and optimistic.

A majority of adults say they would be comfortable if their provider started to use artificial intelligence tools for disease detection support (58%) and administrative tasks (57%). How comfortable or uncomfortable would you be, if at all, if your provider started to use artificial intelligence tools for each of the following? *Total Comfortable*

	Adults	Gender: Male	Gender: Female	Age: 18-34	Age: 35-44	Age: 45-64	Age: 65+	Income: Under 50k	Income: 50k- 100k	Income: 100k+
Disease detection support	58%	63%	52%	55%	65%	57%	56%	51%	63%	54%
Administrative tasks	57%	62%	53%	55%	64%	55%	58%	50%	61%	55%
Disease treatment support	53%	59%	48%	52%	59%	51%	53%	48%	56%	49%
Disease diagnosis support	52%	58%	47%	47%	57%	54%	54%	46%	58%	51%
Your specialty care	46%	52%	40%	48%	55%	44%	37%	41%	48%	37%
Virtual nursing assistants	44%	51%	37%	46%	53%	45%	33%	40%	45%	36%
Your primary care	44%	51%	37%	51%	51%	42%	34%	41%	46%	34%
Robotic surgery	40%	44%	37%	35%	45%	43%	38%	35%	42%	34%

- Men are more likely than women to say they are comfortable with all of the tested scenarios. High-income adults are more likely than
 middle- and low-income adults to say so.
- Adults age 65+ are especially unlikely to say they would be comfortable with their provider using artificial intelligence tools for specialty
 care, virtual nursing assistants and primary care.

Of the options tested, adults are least comfortable with their provider using artificial intelligence tools for robotic surgery (44%), primary care (42%), virtual nursing assistants (39%), and specialty care (31%).

How comfortable or uncomfortable would you be, if at all, if your provider started to use artificial intelligence tools for each of the following? *Total Uncomfortable*

	Adults	Gender: Male	Gender: Female	Age: 18-34	Age: 35-44	Age: 45-64	Age: 65+	Income: Under 50k	Income: 50k-100k	Income: 100k+
Robotic surgery	44%	43%	45%	47%	39%	41%	50%	45%	48%	38%
Your primary care	42%	38%	46%	32%	35%	44%	56%	41%	44%	38%
Virtual nursing assistants	39%	36%	43%	34%	29%	39%	54%	38%	43%	36%
Your specialty care	38%	33%	41%	30%	31%	41%	50%	37%	40%	36%
Disease treatment support	31%	29%	34%	29%	25%	32%	36%	33%	33%	23%
Disease diagnosis support	31%	30%	33%	31%	27%	30%	34%	33%	32%	24%
Disease detection support	27%	24%	29%	24%	20%	29%	30%	28%	27%	23%
Administrative tasks	26%	25%	27%	26%	20%	28%	28%	29%	26%	17%

- Except for robotic surgery, older adults are more likely than younger adults to say they would be uncomfortable if their provider started
 to use artificial intelligence tools for all of the tested scenarios.
- Females are more likely than males to say they would be uncomfortable if their provider started using artificial intelligence tools for primary care, virtual nursing assistants, specialty care, and disease treatment and detection support.



TRACKING: MEDICAL TECHNOLOGY

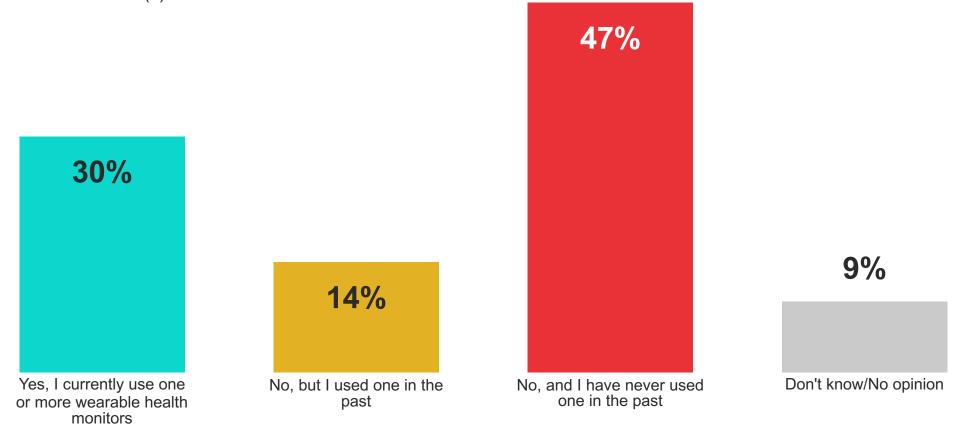
ARTIFICIAL INTELLIGENCE IN HEALTHCARE

WEARABLE HEALTH MONITORS



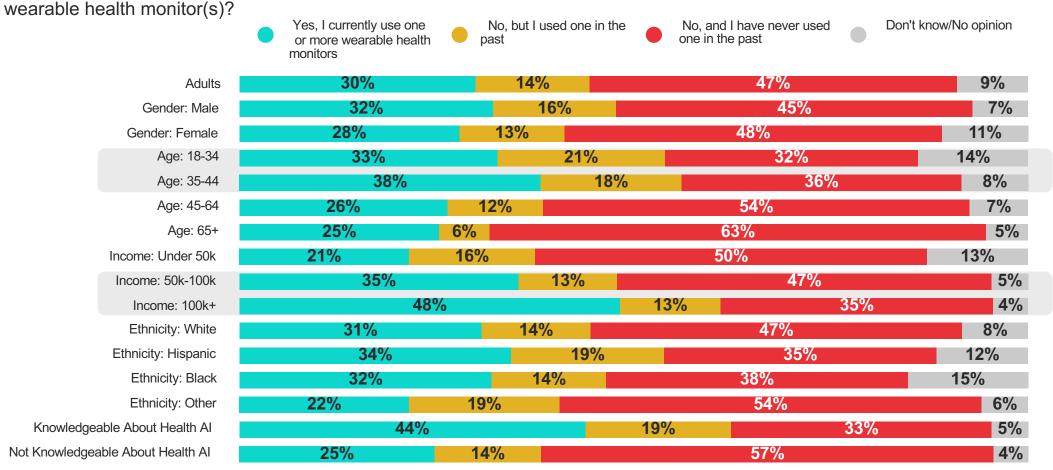
About a third (30%) of adults say they currently use one or more wearable health monitors.

As you may know, wearable healthcare technology refers to health and fitness monitoring devices worn on the body such as your wrist, finger, or neck. Examples include Garmin smartwatches, Apple watches, Fitbits, and Oura rings. Do you currently use any kind of wearable health monitor(s)?



Younger adults and higher-income adults are especially likely to say they use one or more wearable health monitors.

As you may know, wearable healthcare technology refers to health and fitness monitoring devices worn on the body such as your wrist, finger, or neck. Examples include Garmin smartwatches, Apple watches, Fitbits, and Oura rings. Do you currently use any kind of



WEARABLE HEALTH MONITORS

Adults who do not currently use a wearable health monitor say they do not have a need for one (45%) or that the devices are too expensive (30%).

Which of the following reasons best describe why you do not currently own a wearable health monitor, such as a fitness tracker or smartwatch? Please select all that apply.

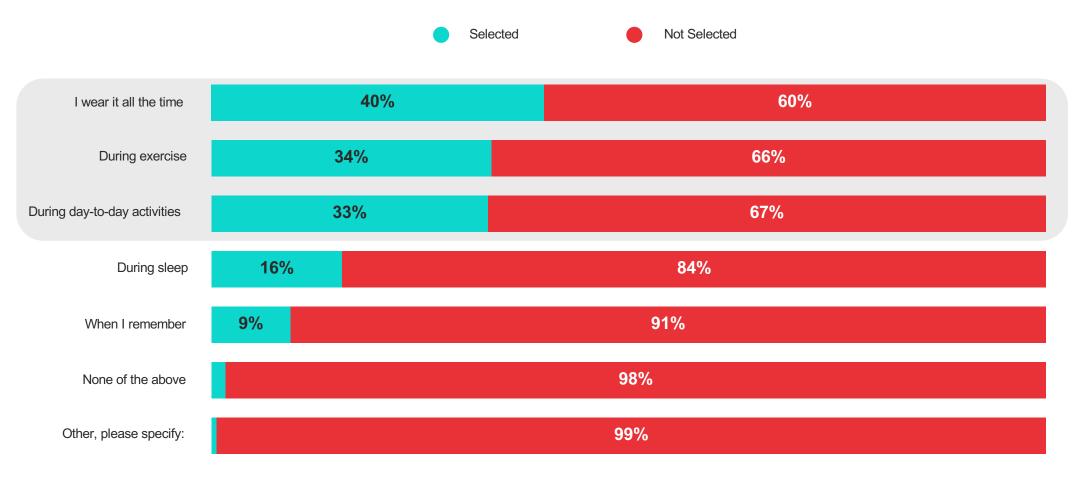
AMONG ADULTS THAT DON'T CURRENTLY USE A WEARABLE HEALTH MONITOR, n=1,343



Adults who currently use a wearable health monitor say they wear it all the time (40%), during exercise (34%), and during day-to-day activities (33%).

Which of the following best describes the situations you use your wearable health monitor(s), if ever? Please select all that apply.

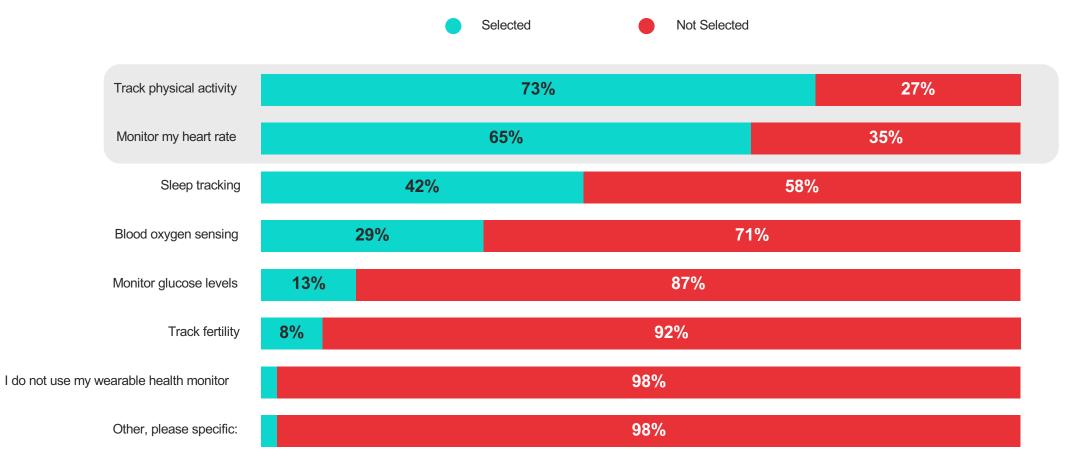
AMONG WEARABLE HEALTH MONITOR USERS, n=659.



A majority of current wearable health monitor users say they use their monitor(s) to track physical activity (73%) and to monitor their heart rate (65%).

Which of the following describes how you use your wearable health monitor(s), if any? Please select all that apply.

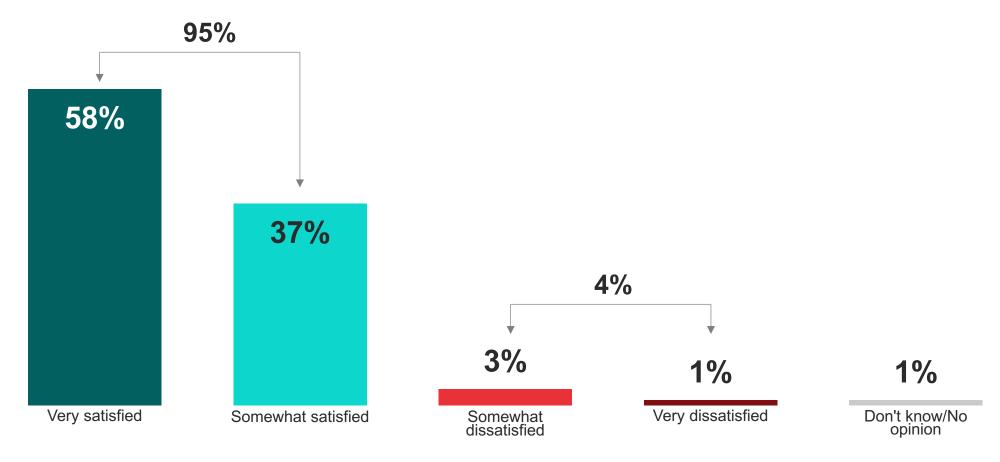
AMONG WEARABLE HEALTH MONITOR USERS, n=659.



Nearly all current wearable health monitor users say they are satisfied (95%) with their monitor.

How satisfied or dissatisfied are you with your wearable health monitor(s), if at all?

AMONG WEARABLE HEALTH MONITOR USERS, n=659.



Adults say ease of use (58%) and affordability (57%) would be very important if they were looking to purchase a wearable health monitor.

If you were looking to purchase a wearable health monitor, how important would each of the following features be, if at all?

