

2017 **KLICK HEALTH**
CONSUMER SURVEY ON
HEALTHCARE INNOVATION

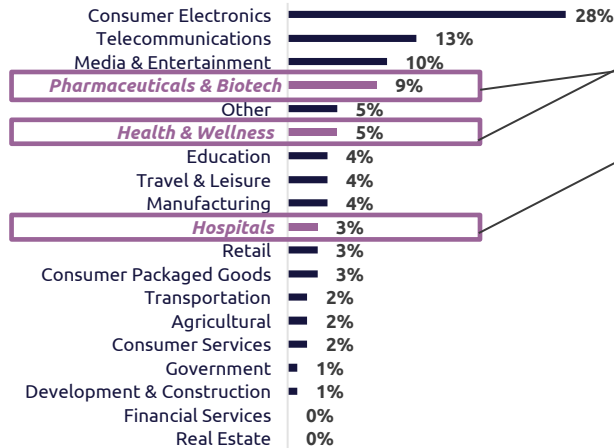


SURVEY METHODOLOGY:

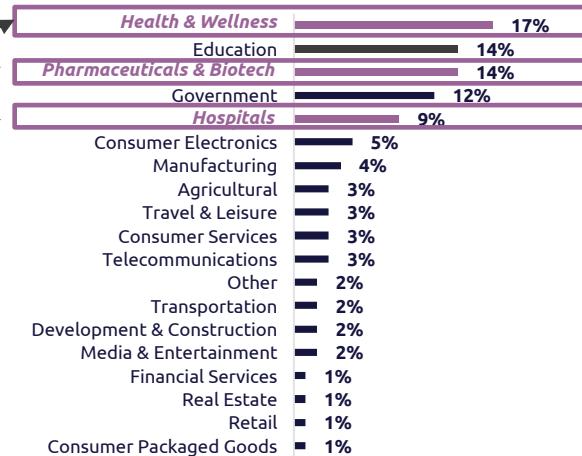
An online omnibus survey was conducted between May 19 and May 21, 2017 through MARU/Matchbox among 1,012 randomly selected American adults who are also Springboard America Community panel members. The margin of error is +/- 3.1%, 19 times out of 20. To ensure that these results are representative of the entire adult population of America, the results have been statistically weighted according to education, age, gender, region, and ethnicity. Discrepancies in or between totals are due to rounding.

HEALTH-RELATED SECTORS RANK LOW AMONG MOST INNOVATIVE INDUSTRIES, BUT MAKE **TOP FIVE** OF THOSE THAT SHOULD BE MOST INNOVATIVE

CONSIDERED MOST INNOVATIVE



SHOULD BE MOST INNOVATIVE



Q. Which of the following industries do you consider to be the most innovative?

Q. Which industry do you think should be the most innovative?

RAW DATA:

INDUSTRIES PERCEIVED TO *BE MOST INNOVATIVE TODAY*

	AVG. TOTAL	MALE	FEMALE	AGE 18-34	AGE 35-54	AGE 55+
Consumer Electronics	28%	28%	28%	28%	29%	27%
Telecommunications	13%	16%	11%	7%	16%	16%
Health & Wellness	5%	6%	3%	4%	6%	5%
Consumer Services	2%	2%	2%	3%	2%	0%
Media & Entertainment	10%	10%	10%	20%	5%	6%
Consumer Packaged Goods	3%	2%	4%	1%	6%	3%
Retail	3%	3%	2%	3%	3%	2%
Manufacturing	4%	6%	2%	3%	3%	6%
Pharmaceutical & Biotech	9%	7%	10%	10%	6%	10%
Real Estate	0%	0%	0%	0%	0%	0%
Hospitals	3%	2%	5%	5%	2%	4%
Travel & Leisure	4%	2%	6%	0%	4%	7%
Development & Construction	1%	1%	0%	1%	0%	0%
Financial Services	0%	0%	1%	1%	1%	0%
Education	4%	4%	4%	4%	3%	6%
Agricultural	2%	1%	3%	1%	3%	2%
Transportation	2%	3%	2%	4%	3%	0%
Government	1%	1%	1%	1%	0%	1%
Other	5%	4%	6%	5%	8%	3%

Q. Which of the following industries do you consider to be the most innovative?

RAW DATA:

INDUSTRIES THAT *SHOULD BE MOST INNOVATIVE*

	AVG. TOTAL	MALE	FEMALE	AGE 18-34	AGE 35-54	AGE 55+
Consumer Electronics	5%	7%	4%	4%	9%	4%
Telecommunications	3%	3%	4%	2%	7%	2%
Health & Wellness	17%	15%	19%	17%	17%	17%
Consumer Services	3%	5%	2%	3%	6%	1%
Media & Entertainment	2%	3%	1%	6%	1%	1%
Consumer Packaged Goods	1%	1%	1%	0%	0%	2%
Retail	1%	0%	2%	2%	1%	1%
Manufacturing	4%	6%	2%	3%	2%	6%
Pharmaceutical & Biotech	14%	14%	14%	12%	12%	17%
Real Estate	1%	1%	1%	2%	0%	0%
Hospitals	9%	8%	11%	9%	8%	11%
Travel & Leisure	3%	5%	1%	5%	2%	1%
Development & Construction	2%	3%	0%	2%	3%	0%
Financial Services	1%	1%	1%	4%	0%	0%
Education	14%	12%	15%	12%	15%	15%
Agricultural	3%	1%	6%	7%	3%	1%
Transportation	2%	3%	1%	1%	2%	4%
Government	12%	9%	14%	10%	9%	16%
Other	2%	2%	1%	0%	3%	2%

Q. Which industry do you think should be the most innovative?

ALMOST 50% THINK CREATIVE-INNOVATION IN HEALTHCARE WILL LEAD TO BETTER TREATMENT AND DIAGNOSIS IN NEXT FIVE YEARS

	AVG. TOTAL	MALE	FEMALE	AGE 18-34	AGE 35-54	AGE 55+
Help patients' loved ones better provide care	4%	4%	4%	4%	5%	3%
Help patients better manage their own health	16%	16%	17%	16%	17%	16%
Help physicians better treat patients	21%	18%	23%	23%	20%	20%
Help to improve disease diagnosis	16%	18%	15%	12%	18%	19%
Help prevent disease	19%	20%	19%	23%	15%	21%
Help provide more personalized medicine	12%	10%	13%	10%	14%	11%
Other	2%	2%	2%	1%	2%	3%
It won't help	9%	11%	7%	11%	9%	8%

Q. In what ways, if any, do you think creative-innovation in healthcare will help people most in the next 5 years?

HALF OF AMERICANS SAY *TECHNOLOGY HAS HAD A POSITIVE IMPACT ON THEIR HEALTH & WELLNESS*

	AVG. TOTAL	MALE	FEMALE	AGE 18-34	AGE 35-54	AGE 55+
Yes	50%	50%	51%	57%	50%	45%
No	26%	27%	26%	24%	24%	30%
Not sure	23%	23%	23%	18%	26%	25%

Q. Thinking specifically about yourself, has technology positively impacted your health and/or wellness?

70% SAY TECHNOLOGY WILL HELP THEM PERSONALLY *MANAGE THEIR HEALTH*

	AVG. TOTAL	MALE	FEMALE	AGE 18-34	AGE 35-54	AGE 55+
Help me stay healthy	24%	26%	21%	29%	23%	19%
Help me better manage my condition	15%	12%	17%	10%	15%	18%
Help me locate the best treatment options	10%	10%	10%	8%	9%	13%
Help me provide better care to a loved one	3%	3%	2%	4%	3%	1%
Help me prevent sickness or disease	14%	12%	15%	14%	15%	13%
Help me communicate with others about my health condition	4%	3%	5%	6%	4%	2%
Help me locate the best healthcare professionals	3%	4%	3%	4%	3%	3%
Help my physician or caregiver(s) better empathize with my condition	2%	3%	1%	2%	2%	3%
Help my physician provide earlier diagnosis	14%	13%	15%	11%	17%	14%
Other	1%	1%	2%	0%	1%	3%
It won't have a positive impact on my health	10%	12%	9%	12%	9%	11%

Q. Where do you think technology will have the most positive impact on your health in the future?

ONLY 41% HAVE EVER USED *TECHNOLOGY FOR HEALTH*

	AVG. TOTAL	MALE	FEMALE	AGE 18-34	AGE 35-54	AGE 55+
Yes	41%	43%	39%	60%	45%	21%
No	59%	57%	61%	40%	55%	79%

Q. Have you used or are you currently using innovative technology to help manage your health?

PREDICTIONS: WEARABLES, ROBOTICS, 3D PRINTING, SMART HOME DEVICES & AI TO HAVE BIGGEST IMPACT ON HEALTH IN NEXT FIVE YEARS

	AVG. TOTAL	MALE	FEMALE	AGE 18-34	AGE 35-54	AGE 55+
Health and Fitness Wearables	21%	19%	24%	16%	22%	25%
3D Printing	10%	8%	12%	14%	9%	8%
Virtual Reality	6%	6%	5%	6%	7%	4%
Augmented Reality	2%	3%	1%	4%	2%	0%
Voice-Controlled Devices	4%	4%	4%	2%	3%	5%
Smart Home Devices	9%	8%	11%	9%	8%	11%
Artificial Intelligence	9%	12%	5%	13%	7%	7%
Mobile Apps	8%	7%	9%	9%	10%	6%
Robotics	15%	17%	12%	14%	17%	12%
Other	3%	2%	3%	1%	3%	4%
None of these will impact on people's health in the next 5 years	14%	15%	14%	12%	13%	19%

Q. In your opinion, what technology do you think will likely have the biggest impact on people's health in the next 5 years?

FOR MORE INFORMATION PLEASE CONTACT:
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