



TECH, NO FEVER

International consumer study on personal health technology

August 2024

A business of Marsh McLennan

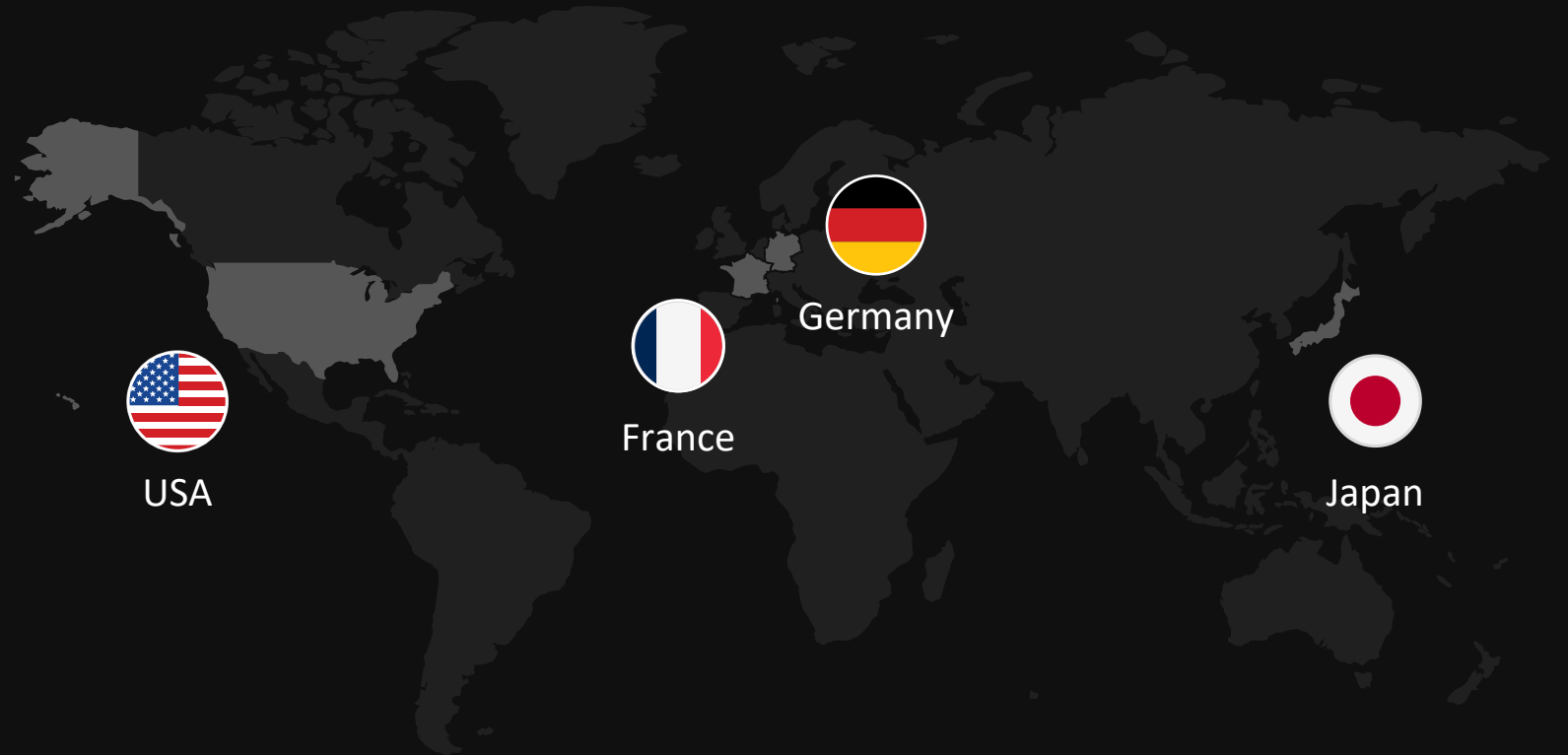
THIS STUDY WAS CONDUCTED IN JULY 2024

Sample size by country

~4,200

Participants

Representative online consumer survey, conducted in 4 countries in August 2024



PERSONAL HEALTH AND CARE TECH WILL ACCOMPANY US THROUGH OUR ENTIRE LIFETIME



Examples

Early detection of anomalies in a fetus through AI-based ultrasound analytics

Robot-supported day care for monitoring and supporting babies and toddlers

Robots taking over daily care tasks, e.g., in hospitals

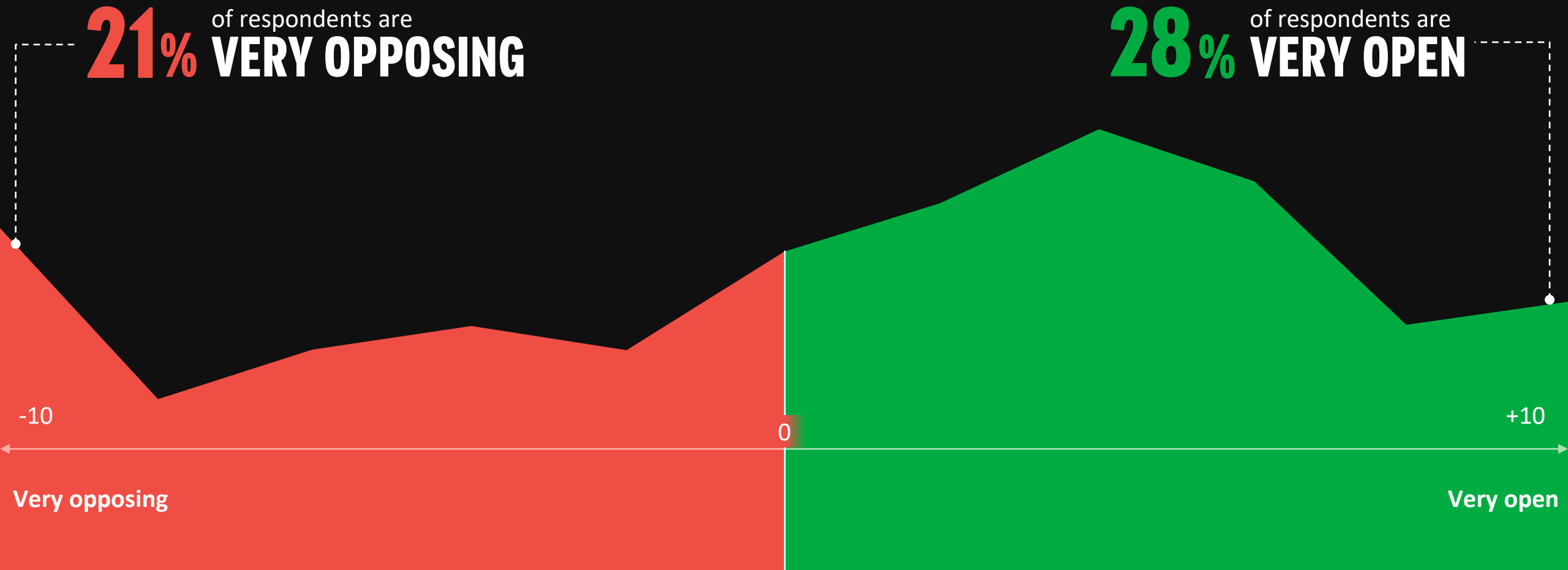
AI-based therapy, mental support robots

AI-based family doctor for general health questions

Robots to take over daily care tasks or provide company to elderly people

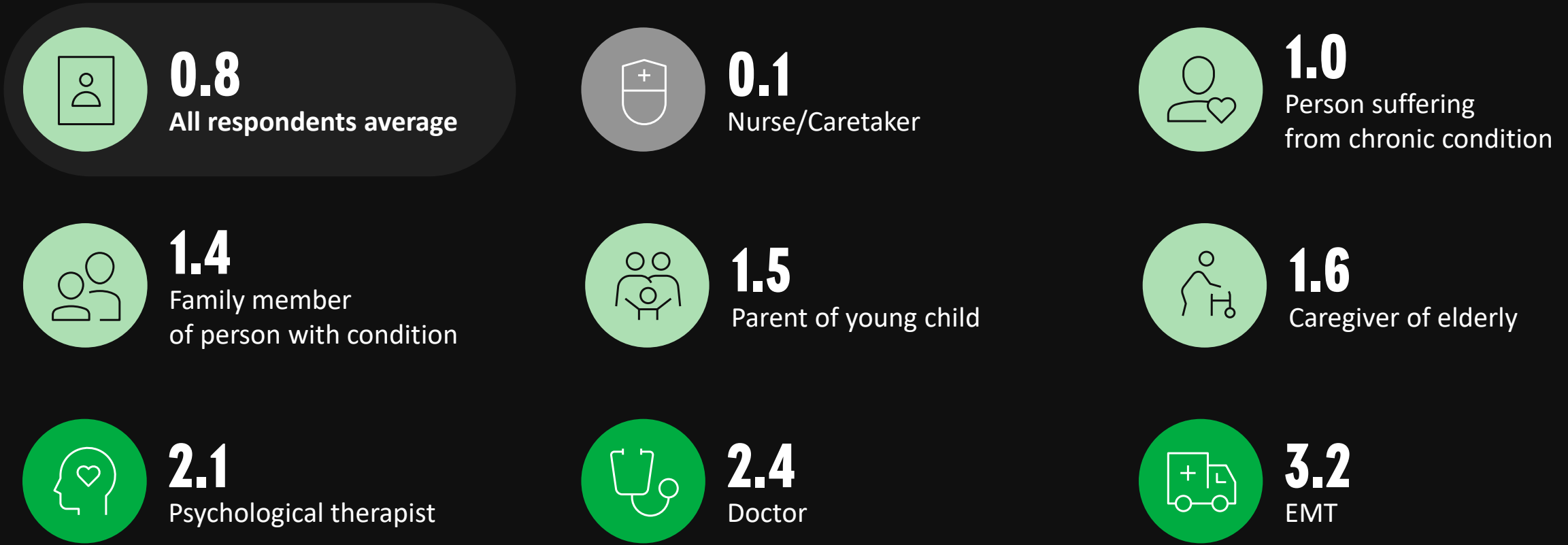
HEALTH AND CARE TECH IS A HIGHLY POLARIZING TOPIC FOR CONSUMERS

Openness for health tech across 6 use cases, across countries, total % of respondents on scale from -10 to +10



DIRECTLY AFFECTED PEOPLE ARE MORE OPEN TO TECHNOLOGIES

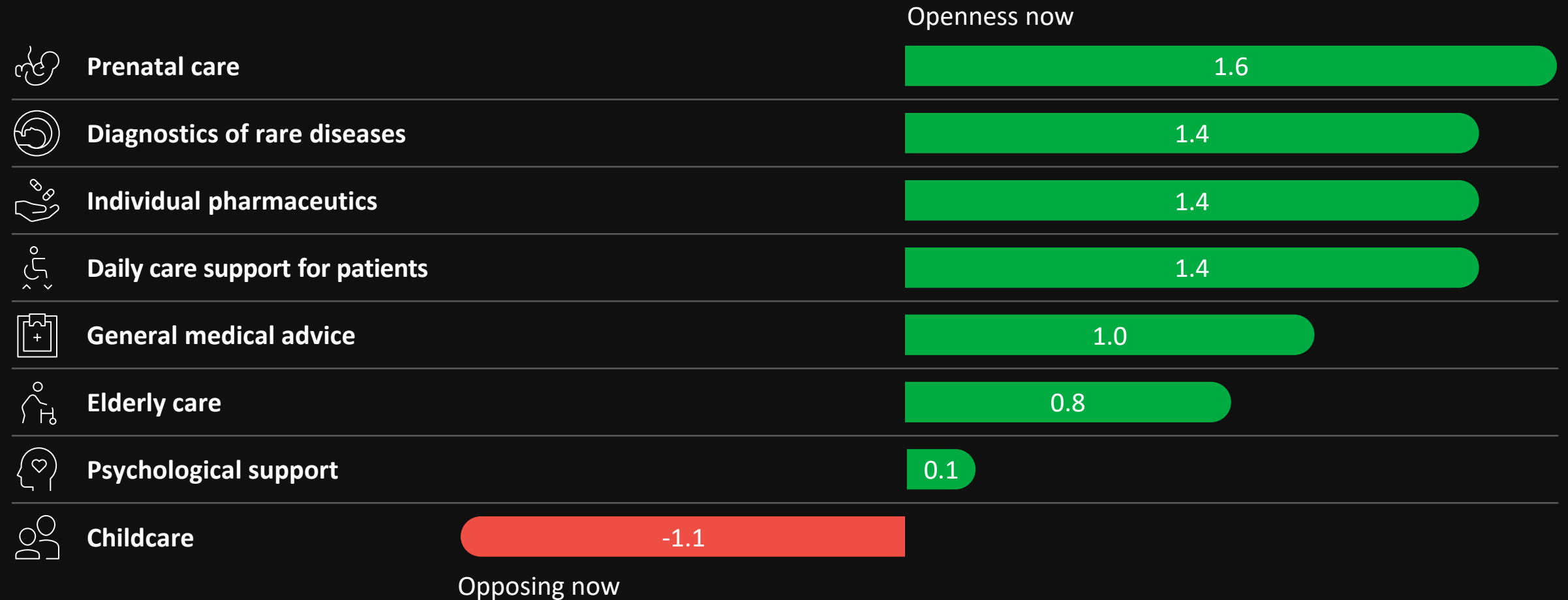
Openness across countries and use cases on scale from -10 to +10, by background of respondent



Less open    More open

OPENNESS IS BY FAR HIGHEST IN AI-SUPPORTED DIAGNOSTICS AND PHARMACEUTICAL RECOMMENDATION

Respondents' openness for health tech by various use cases



POLARIZATION ALSO SHOWS IN OPPORTUNITIES AND CONCERNS FELT BY CONSUMERS

Key concerns and opportunities mentioned by consumers

Concerns

Opportunities

I feel care should be in the hands of humans with real emotions and empathy **47%**

I'm worried about misunderstandings leading to wrong treatments **40%**

I'm afraid health workers will lose their jobs **34%**

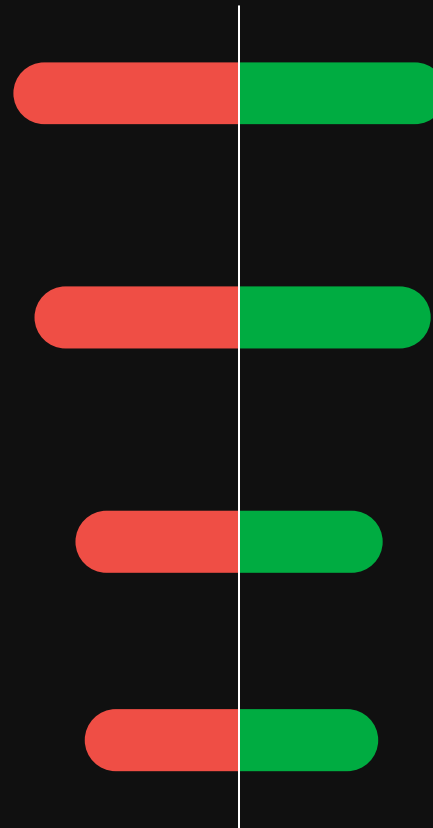
I'm afraid this technology would be too expensive **32%**

43% Technology/AI is available 24/7

40% Technology/AI can lead to better treatments due to the large amount of information it can process

30% It will help to take off pressure from a healthcare system running beyond capacity

29% Technology would help to save costs in care



WHICH HURDLES DO WE NEED TO TAKE TO ALLOW FOR A GREATER OPENNESS FOR TECHNOLOGY IN HEALTHCARE?

“

*You need to give people the feeling that behind each machine **there is still a human who cares, who they can rely on***

*I want proof that this is not just for saving costs, but **actually improves the quality of my health***

*I feel **technology is developing faster than people's understanding** for it. Make sure to leave nobody behind*

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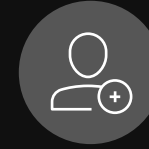
KEY RESULTS OF THE STUDY



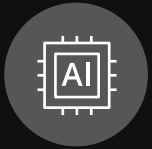
Digital health and care technologies are **strongly polarizing consumers** – with 21% being strongly opposing and 28% strongly in favour



Openness is **highest in Germany, followed by Japan and US**. Consumers in France appear most opposing to digital health and care technologies



Directly affected people are more open to technologies: especially doctors, EMTs, but also people caring for young children or people with chronic diseases



Consumers are most interested in use cases along **AI-based medical advise**, e.g., in prenatal care, disease diagnostics, and pharmaceutical advise. They are most **critical about tech esp. in childcare**



Benefits and concerns seen by consumers reflect their polarization: they want **human contact but appreciate tech's 24/7 availability**. They see data risks, but huge opportunities in **health data analytics**



For consumer electronics brands, personal health represents an **attractive and growing hunting field** – if they manage to take consumers' concerns and **strike the right balance between tech and human touch**

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