

REDC

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THE IRISH SOFTWARE  
RESEARCH CENTRE

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For what's next

# Lero RED Line 2020

Date: October 2020

Job Reference: 470920

HOST INSTITUTION



PARTNER INSTITUTIONS

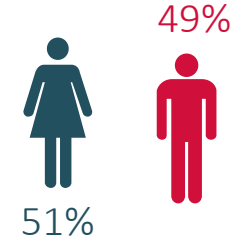


# RED Line Methodology

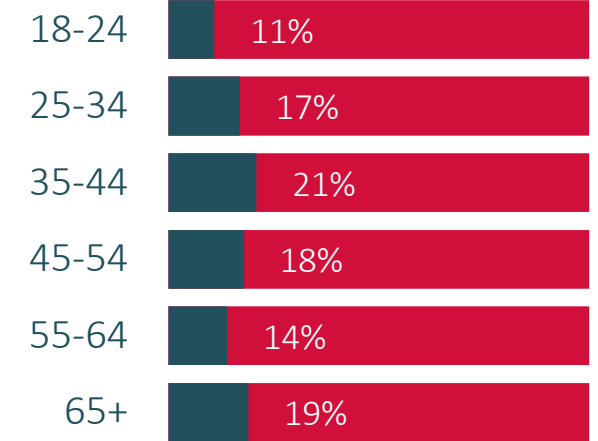
- Online research was conducted with 1,001 ROI adults aged 18+.
- Respondents were recruited using RED C Live, RED C's own online panel of over 40,000 members
- Quota controls were used to ensure a nationally representative sample of ROI adults aged 18+, with interlocking quotas to provide extra confidence in sample profile
- Data was weighted across Gender, age, region and social class so as to ensure a nationally representative sample based on latest CSO projections
- Fieldwork for this research took place from 8<sup>th</sup> – 13<sup>th</sup> October 2020
- Weighted to be representative of all adults aged 18+ using the latest CSO census data on the following demographics



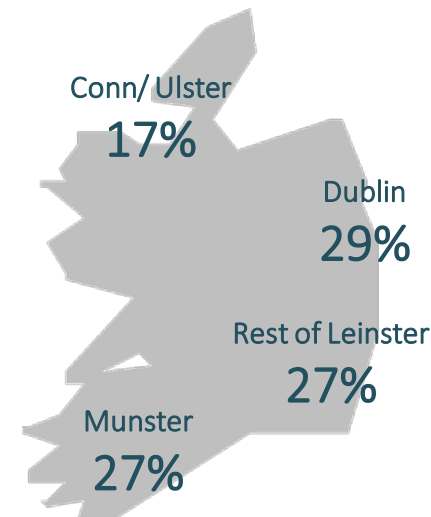
## Gender



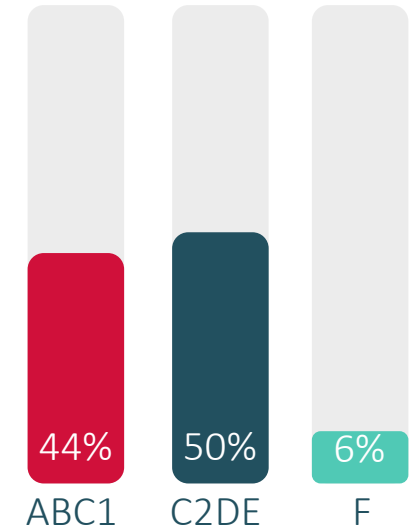
## Age



## Region



## Social Class



# Electronic Health Records

# Support for personal electronic health records has fallen



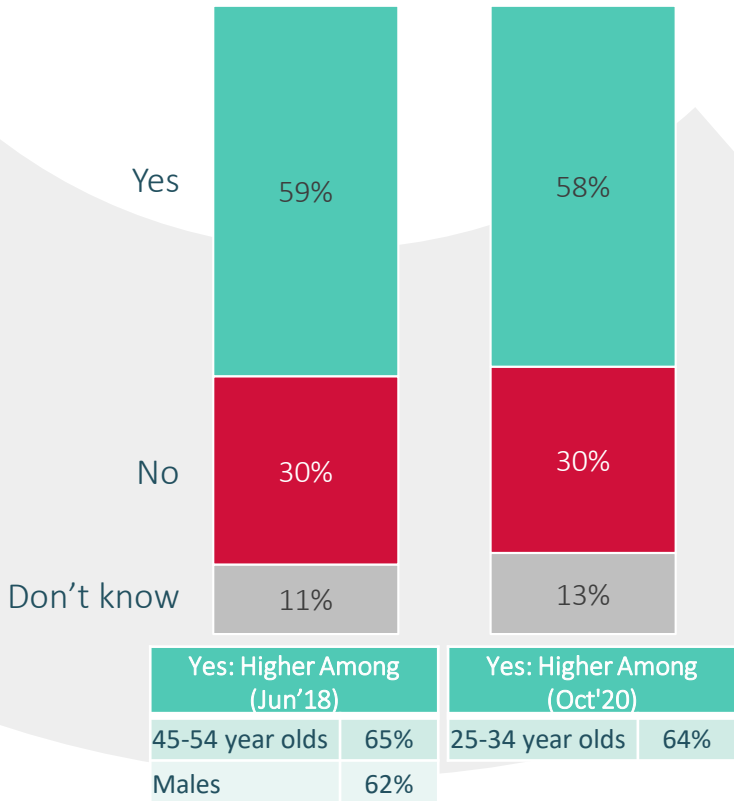
7 in 10 (71%) are in favour of electronic health records, down from 8 in 10 (81%) in 2018.

Are You In Favour Of...?



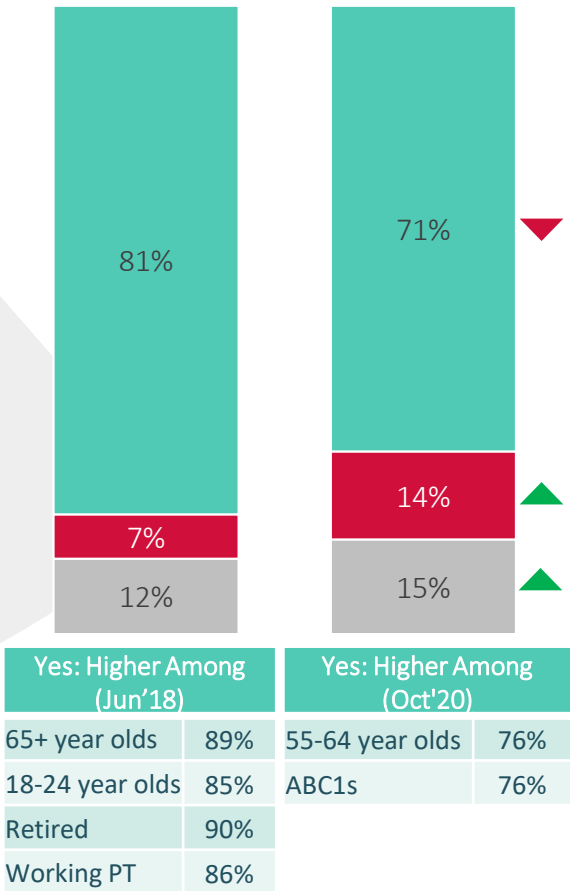
Electronic voting from home on elections & referendums

Jun '18 Oct '20



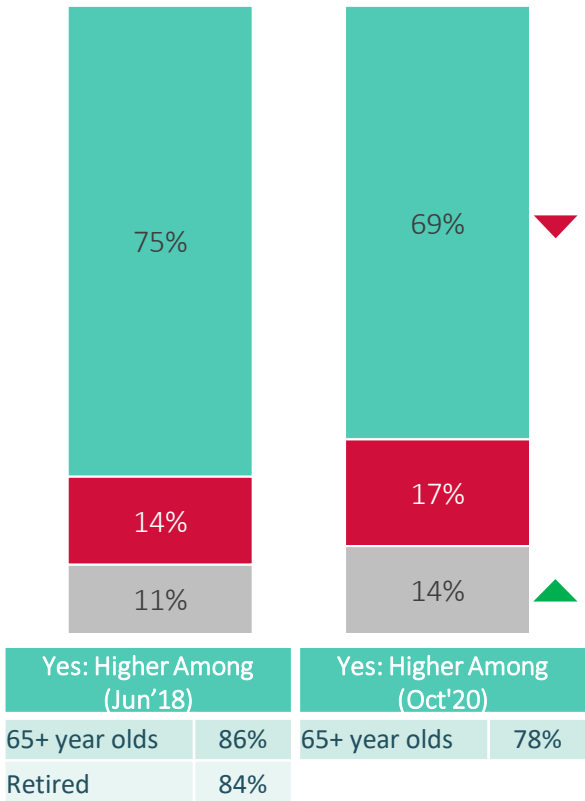
Personal Electronic Health Record

Jun '18 Oct '20



National Identity Card

Jun '18 Oct '20



▲ ▼ Indicates higher / lower significant difference vs. Jun'18  
(Q.1)  
(Base: All Adults Aged 18+; n=1,001)

# Opinions on E-Voting remain largely in line with 2018



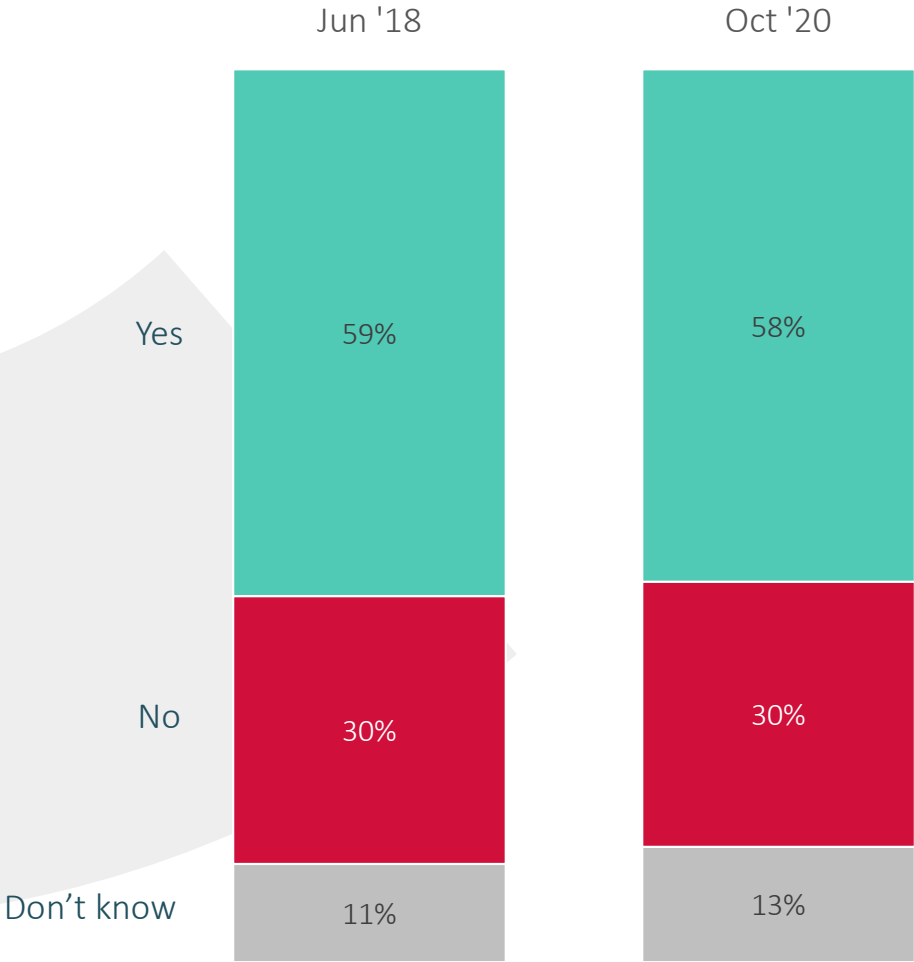
Nearly 3 in 5 (58%) are in favour of electronic voting, growing to almost 3 in 4 (64%) among those aged 25-34 years old.

Are You In Favour of Electronic Voting from Home on Elections & Referendums?



Electronic voting from home on elections & referendums

Yes: Higher Among (Jun'18)	
45-54 year olds	65%
Males	62%



Yes: Higher Among (Oct'20)	
25-34 year olds	64%

# Support for personal electronic health records has fallen



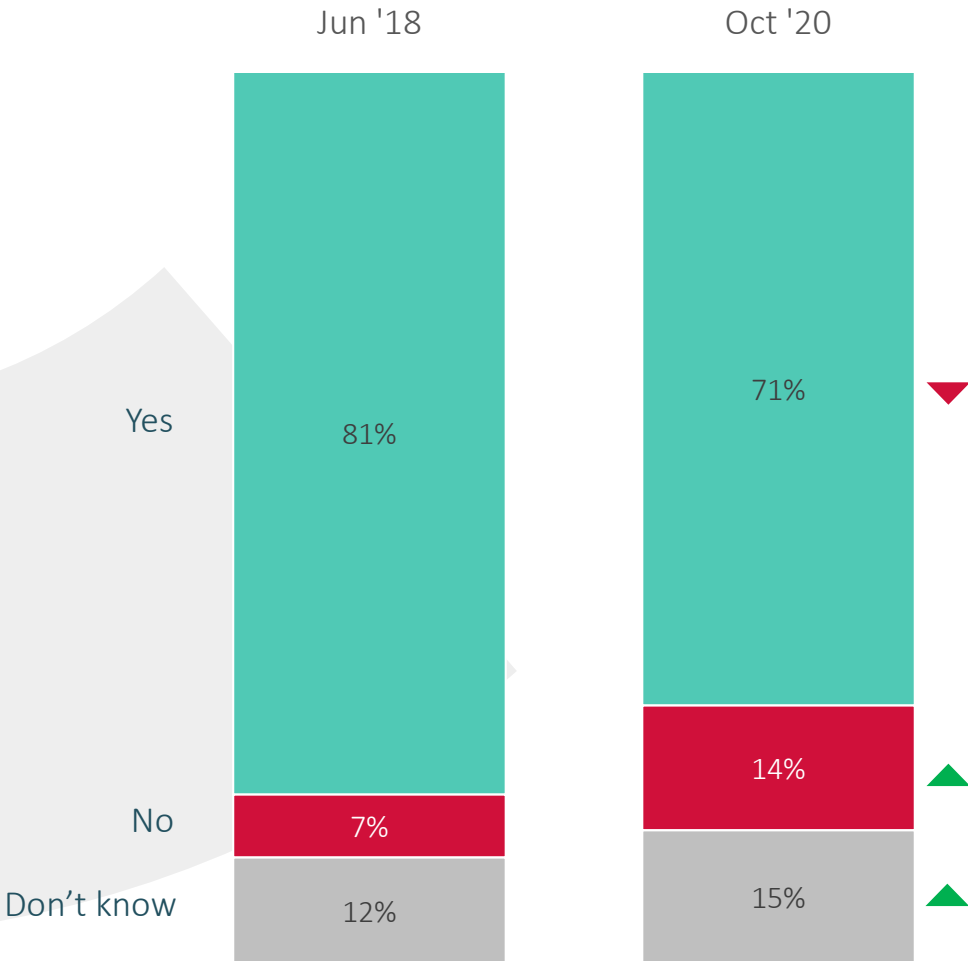
7 in 10 (71%) are in favour of electronic health records, down from 8 in 10 (81%) in 2018.

Are You In Favour of Personal Electronic Health Records?



Personal Electronic Health Record

Yes: Higher Among (Jun'18)	
65+ year olds	89%
18-24 year olds	85%
Retired	90%
Working PT	86%



Yes: Higher Among (Oct'20)	
55-64 year olds	76%
ABC1s	76%

▲ ▼ Indicates higher / lower significant difference vs. Jun'18

# Decline in support for a National Identity Card vs. 2018



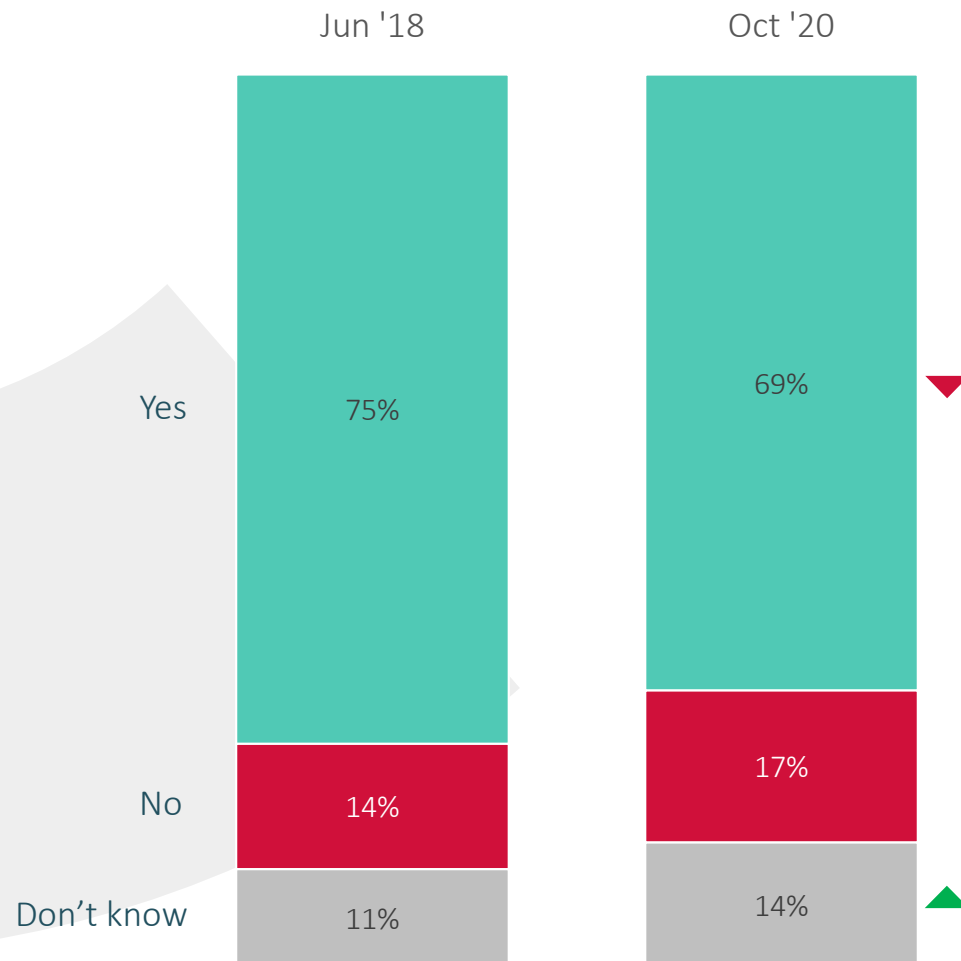
Almost 7 in 10 (69%) are now in favour of a National Identity Card, with support strongest among 65+ year olds.

Are You In Favour of a National Identity Card?



National Identity Card

Yes: Higher Among (Jun'18)	
65+ year olds	86%
Retired	84%



Yes: Higher Among (Oct'20)	
65+ year olds	78%

▲ ▼ Indicates higher / lower significant difference vs. Jun'18

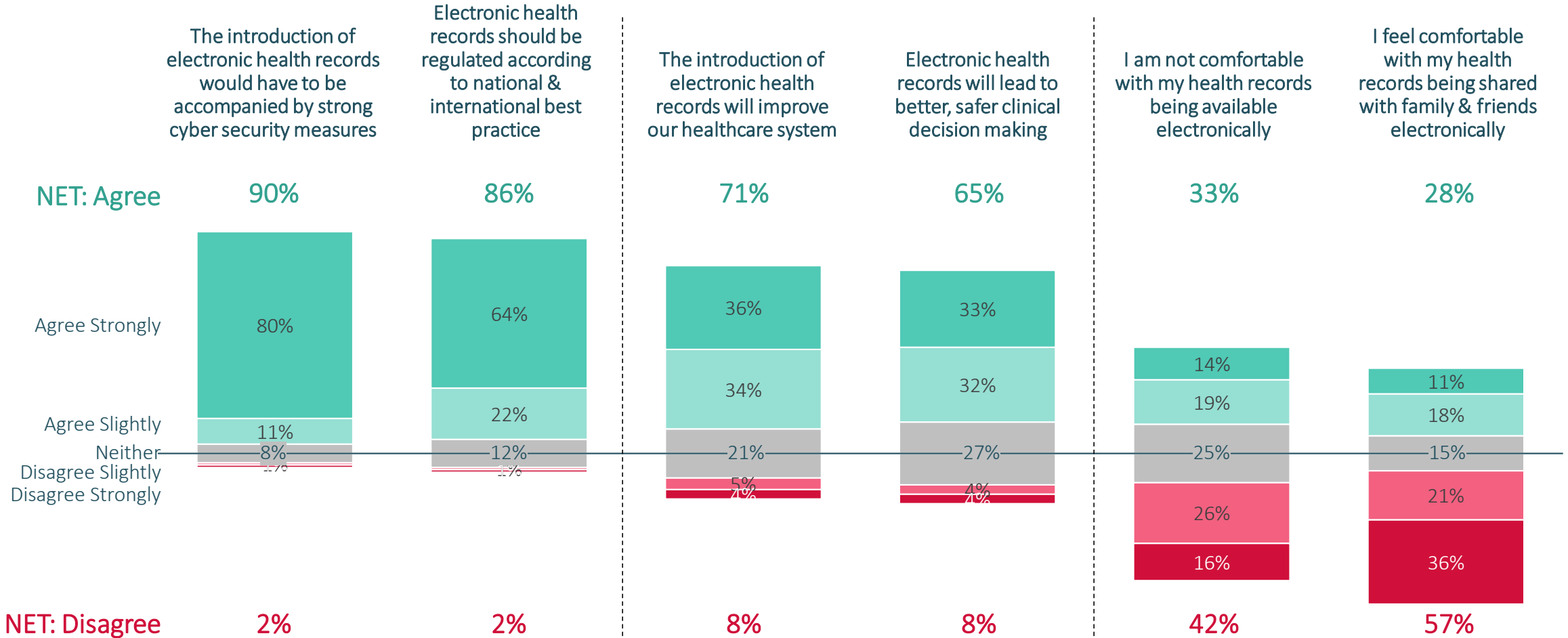
(Q.1)  
(Base: All Adults Aged 18+; n=1,001)

# The public feel that cyber security and regulation is key for EHRs



9 in 10 (90%) want strong cyber security for EHRs. Over 4 in 5 (86%) say that EHRs should be regulated according to best practice. Over half (57%) are not comfortable with their records being available electronically.

## Opinions on Electronic Health Records





# 18-34s and ABC1s most likely to feel EHRs will improve healthcare

55+ year olds are most comfortable with their health records being shared electronically.

Opinions on Electronic Health Records: % Net Agree by Demographics

	Total	Gender		Age			Social Class		Region			
		Male	Female	18-34	35-54	55+	ABC1	C2DE	Dublin	ROL	Munster	Conn/ Ulster
The introduction of electronic health records would have to be accompanied by strong cyber security measures	90%	89%	92%	89%	89%	93%	92%	89%	90%	92%	90%	89%
Electronic health records should be regulated according to national and international best practice	86%	87%	85%	87%	82%	90%	89%	83%	88%	87%	86%	81%
The introduction of electronic health records will improve our healthcare system	71%	73%	68%	▲ 77%	66%	70%	▲ 77%	▼ 64%	73%	75%	68%	▼ 63%
Electronic health records will lead to better, safer clinical decision making	65%	65%	65%	67%	61%	68%	70%	61%	66%	68%	65%	58%
I am not comfortable with my health records being available electronically	33%	33%	33%	35%	35%	31%	34%	32%	35%	36%	32%	28%
I feel comfortable with my health records being shared with family and friends electronically	28%	33%	24%	30%	23%	▲ 34%	27%	30%	29%	30%	31%	21%

▲ ▼ Indicates higher / lower significant difference vs. total

(Q.2)  
(Base: All Adults Aged 18+; n=1,001)

# Virtual Health Clinics

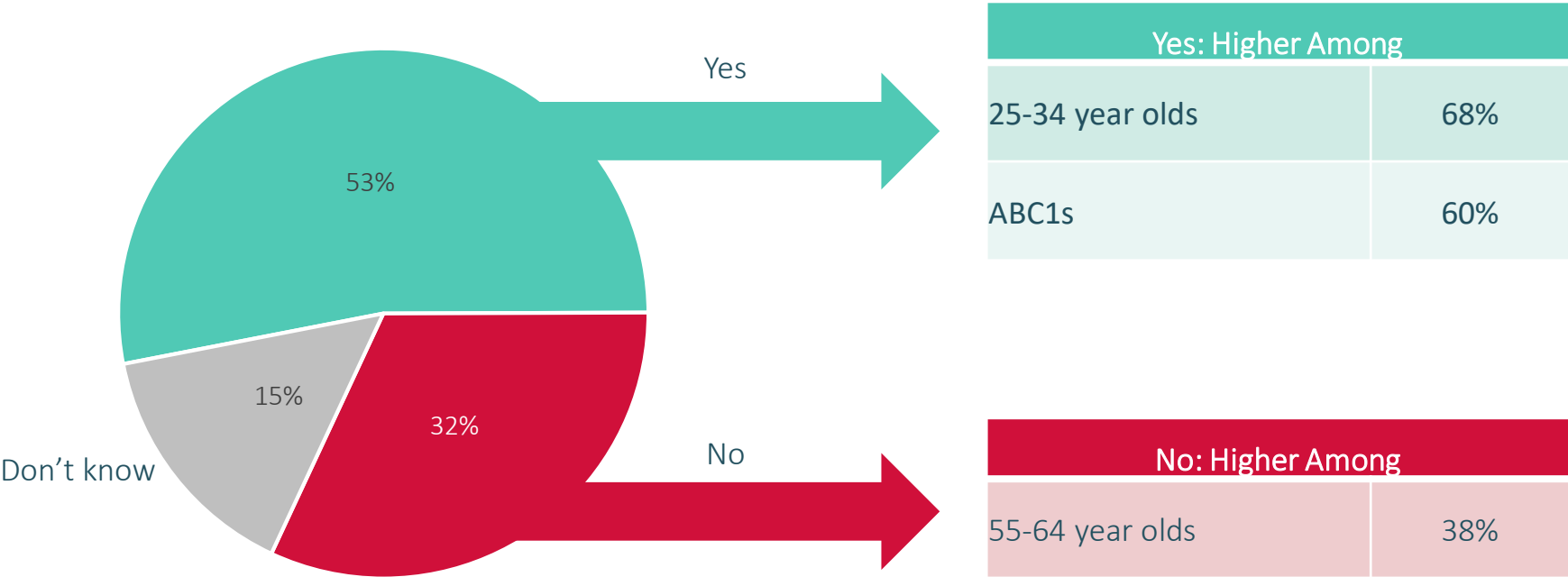
# Over half (53%) believe virtual health clinics are a good idea

25-34 year olds and ABC1s are most supportive of virtual health clinics.



## Virtual Health Clinics

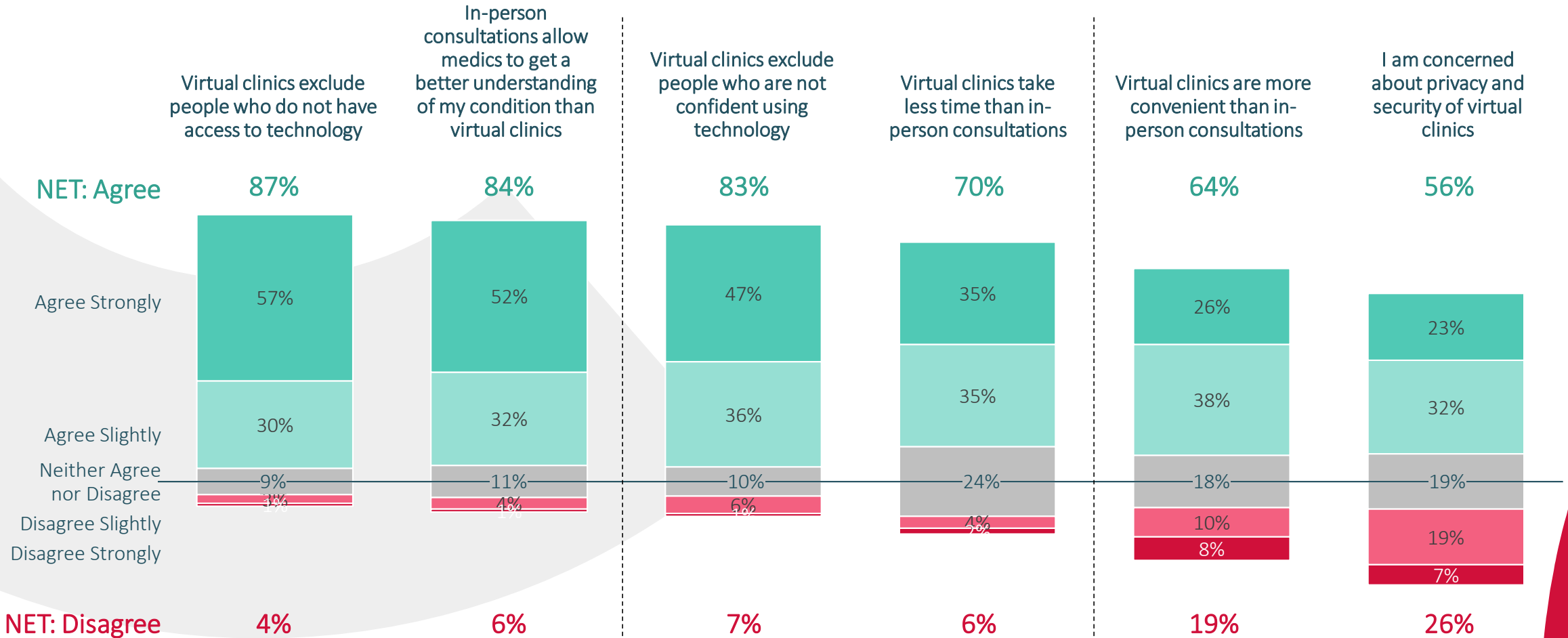
"Are Virtual Health Clinics a Good Idea?"



# Vast majority feel virtual clinics exclude those without technology

More than half (56%) are concerned about privacy and security of virtual health clinics.

## Opinions on Virtual Health Clinics



# ABC1s most likely to find virtual health clinics more convenient



Nearly 9 in 10 (87%) of all females feel that virtual health clinics exclude those who are not confident using technology.

## Opinions on Virtual Health Clinics: % Net Agree by Demographics

		Gender		Age			Social Class		Region			
	Total	Male	Female	18-34	35-54	55+	ABC1	C2DE	Dublin	ROL	Munster	Conn/ Ulster
Virtual clinics exclude people who do not have access to technology (e.g. broadband, webcam etc.)	87%	84%	89%	86%	85%	89%	89%	84%	87%	89%	87%	81% ▼
In-person consultations allow medics to get a better understanding of my condition than virtual clinics	84%	82%	86%	84%	81%	87%	86%	82%	84%	84%	86%	78%
Virtual clinics exclude people who are not confident using technology	83%	79%	87% ▲	80%	82%	87%	87%	81%	86%	86%	81%	78%
Virtual clinics take less time than in-person consultations	70%	69%	71%	73%	69%	68%	75%	66%	72%	74%	68%	63%
Virtual clinics are more convenient than in-person consultations	64%	66%	62%	70%	64%	58%	70% ▲	58% ▼	67%	66%	59%	61%
I am concerned about privacy and security of virtual clinics	56%	54%	58%	57%	56%	56%	54%	57%	53%	60%	57%	52%

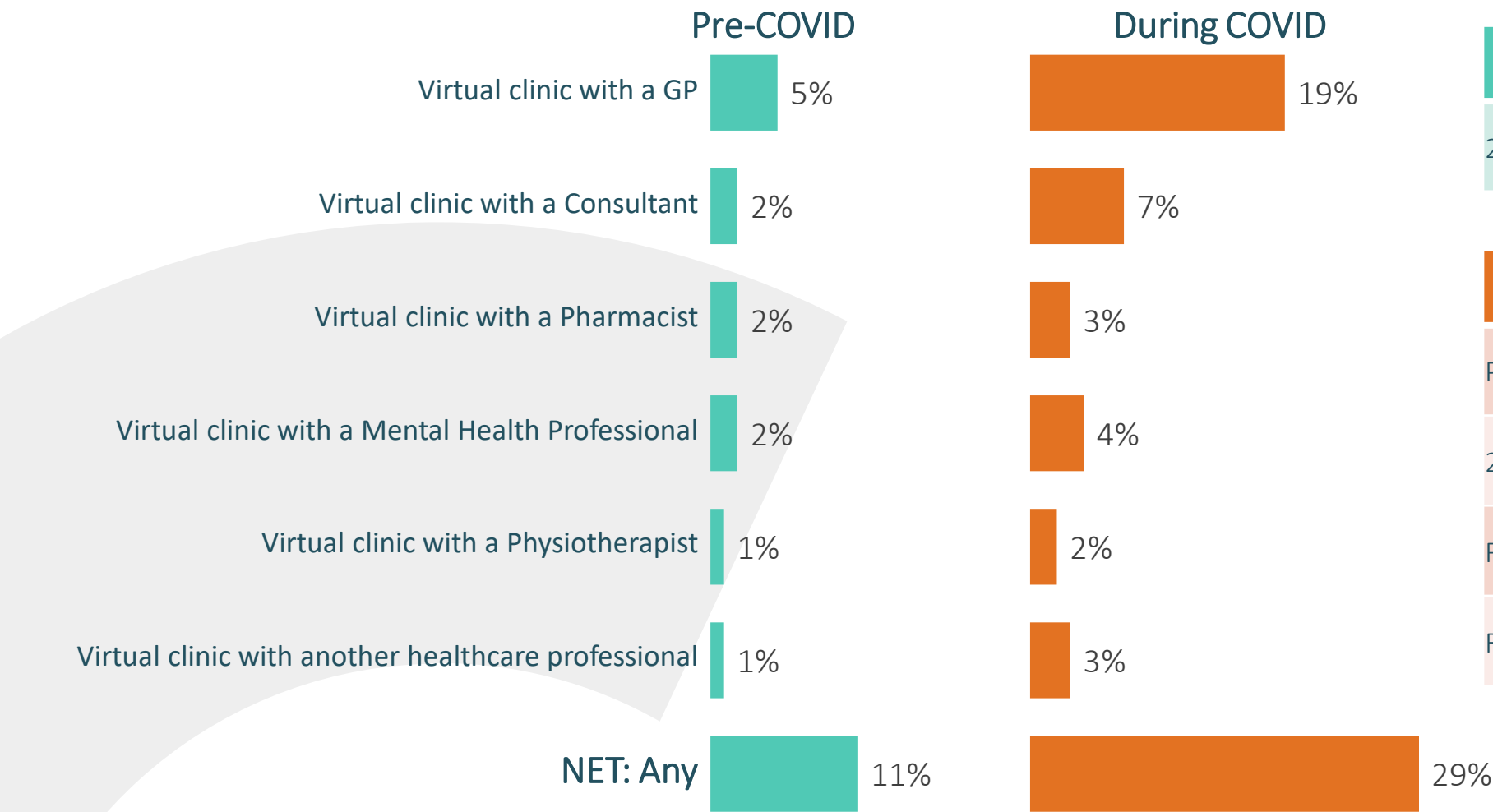
▲ ▼ Indicates higher / lower significant difference vs. total

# Nearly 3 in 10 (29%) have used virtual clinics during COVID crisis



The use of virtual health clinics has grown strongly since the beginning of the pandemic.

## Virtual Health Clinics Taken Part In



Pre-COVID NET Any: Higher Among	
25-34 year olds	22%

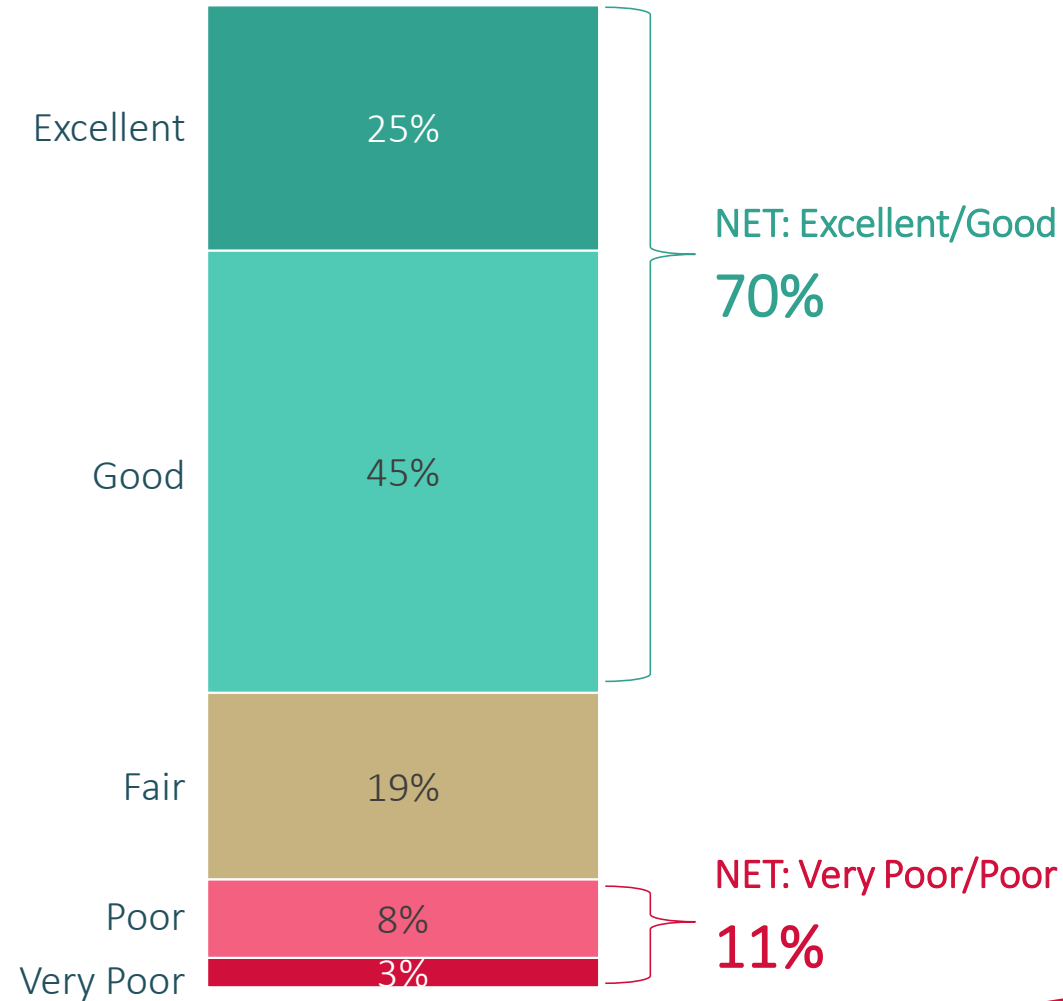
During COVID NET Any: Higher Among	
Parents	37%
25-34 year olds	35%
Females	34%
Rest of Leinster residents	34%

# 7 in 10 (70%) virtual clinic users rate their experience positively



Slightly more than 1 in 10 (11%) have said their experience of virtual health clinics was poor or very poor.

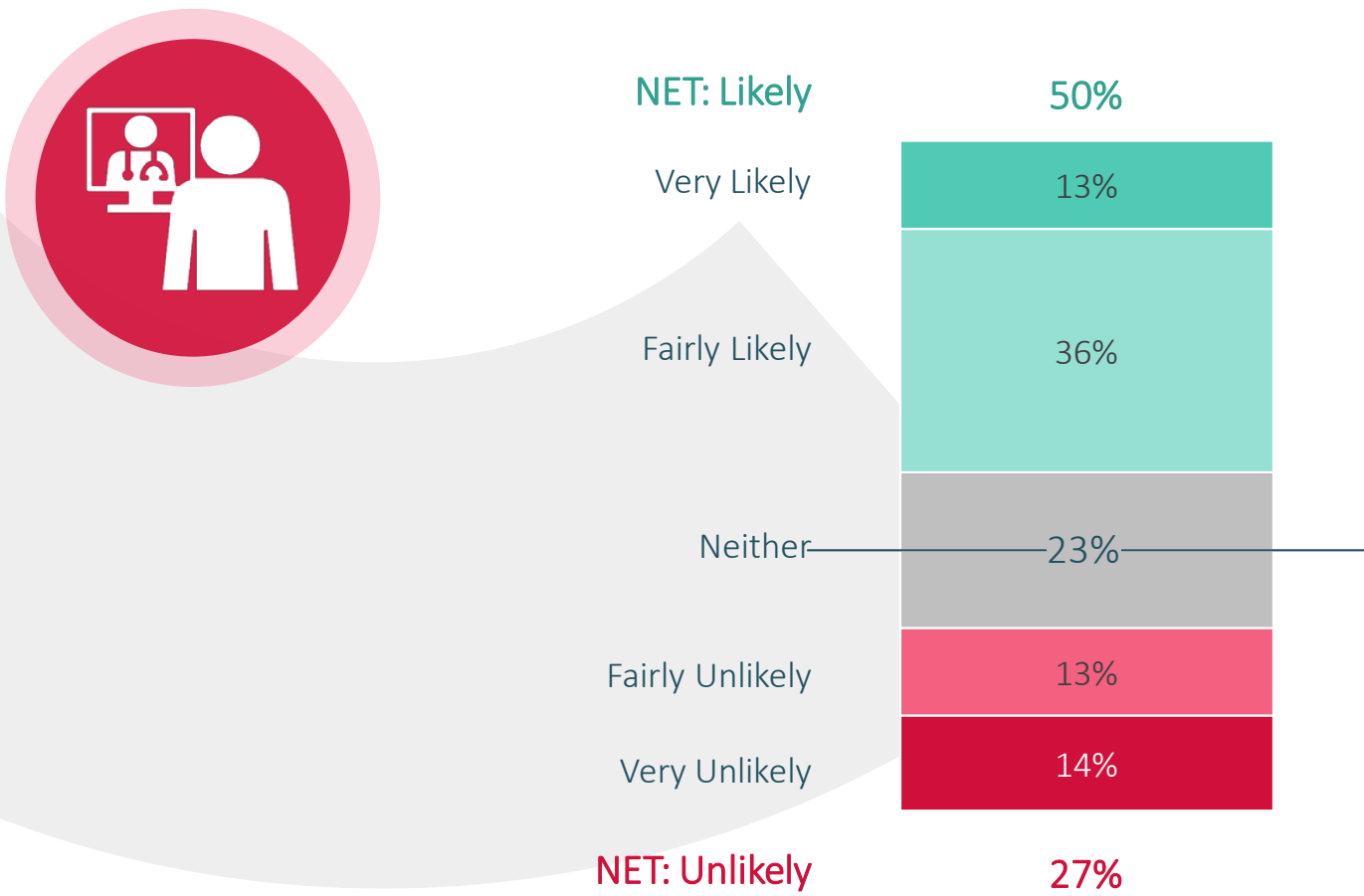
## Rating of Virtual Health Clinics



# Half (50%) of all adults are likely to use virtual clinics in the future

Likelihood is highest among those ages 25-34 years old (60%) and ABC1s (55%).

## Likelihood to Participate in a Virtual Health Clinic



NET Likely: Higher Among	
25-34 year olds	60%
ABC1s	55%



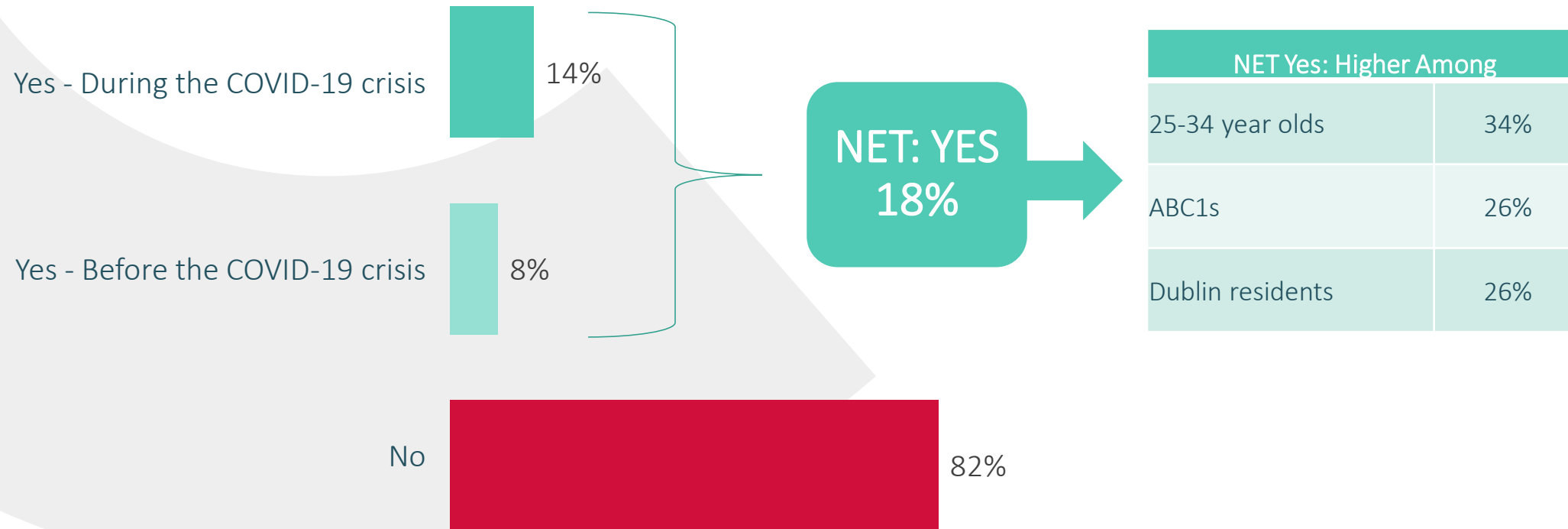
# Online Exercise Classes

# Nearly 1 in 5 (18%) have taken part in an online exercise class



Online exercise classes have become more popular during COVID. 25-34 year olds, ABC1s and Dublin residents are most likely to have taken part in online exercise classes in the past.

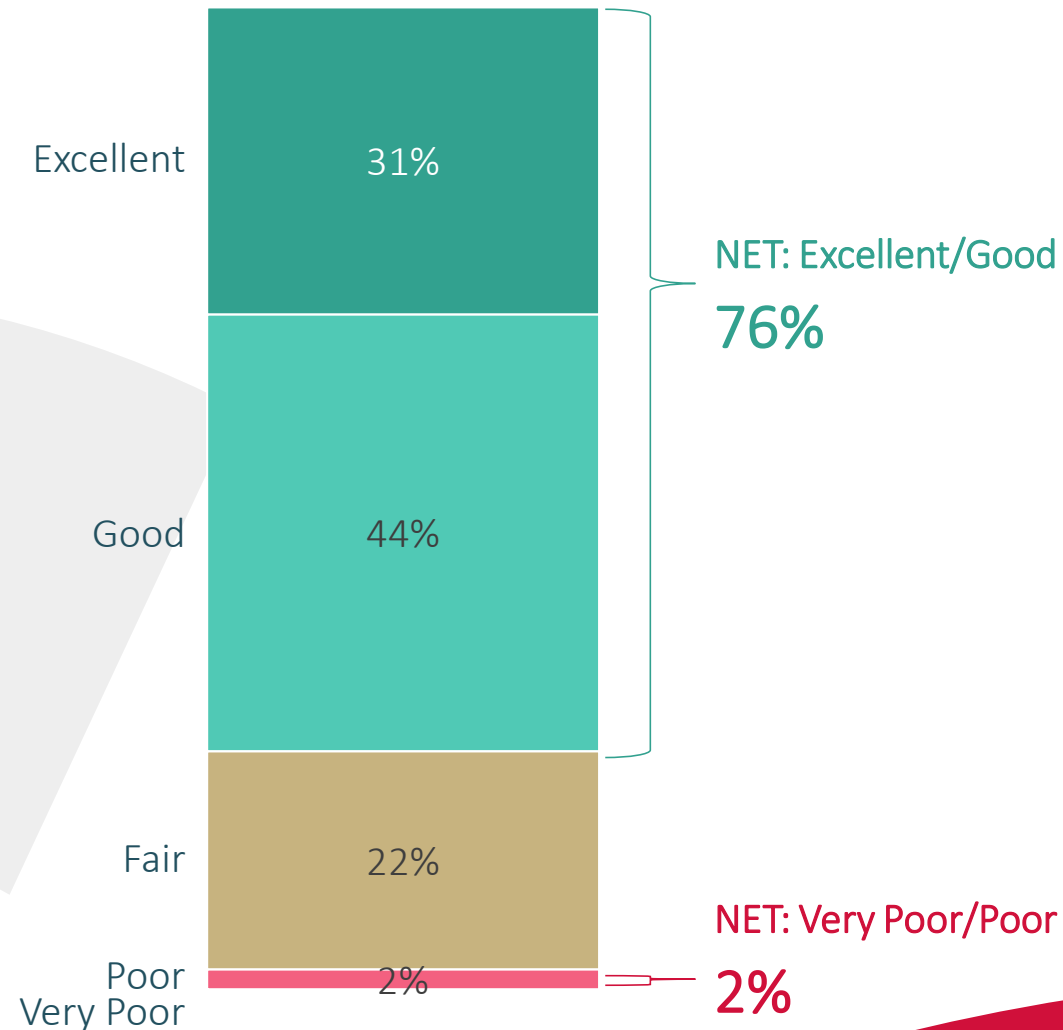
## Participation in Online Exercise Classes



# 3 in 4 (76%) rate online exercise classes as excellent/good



## Rating of Online Exercise Classes

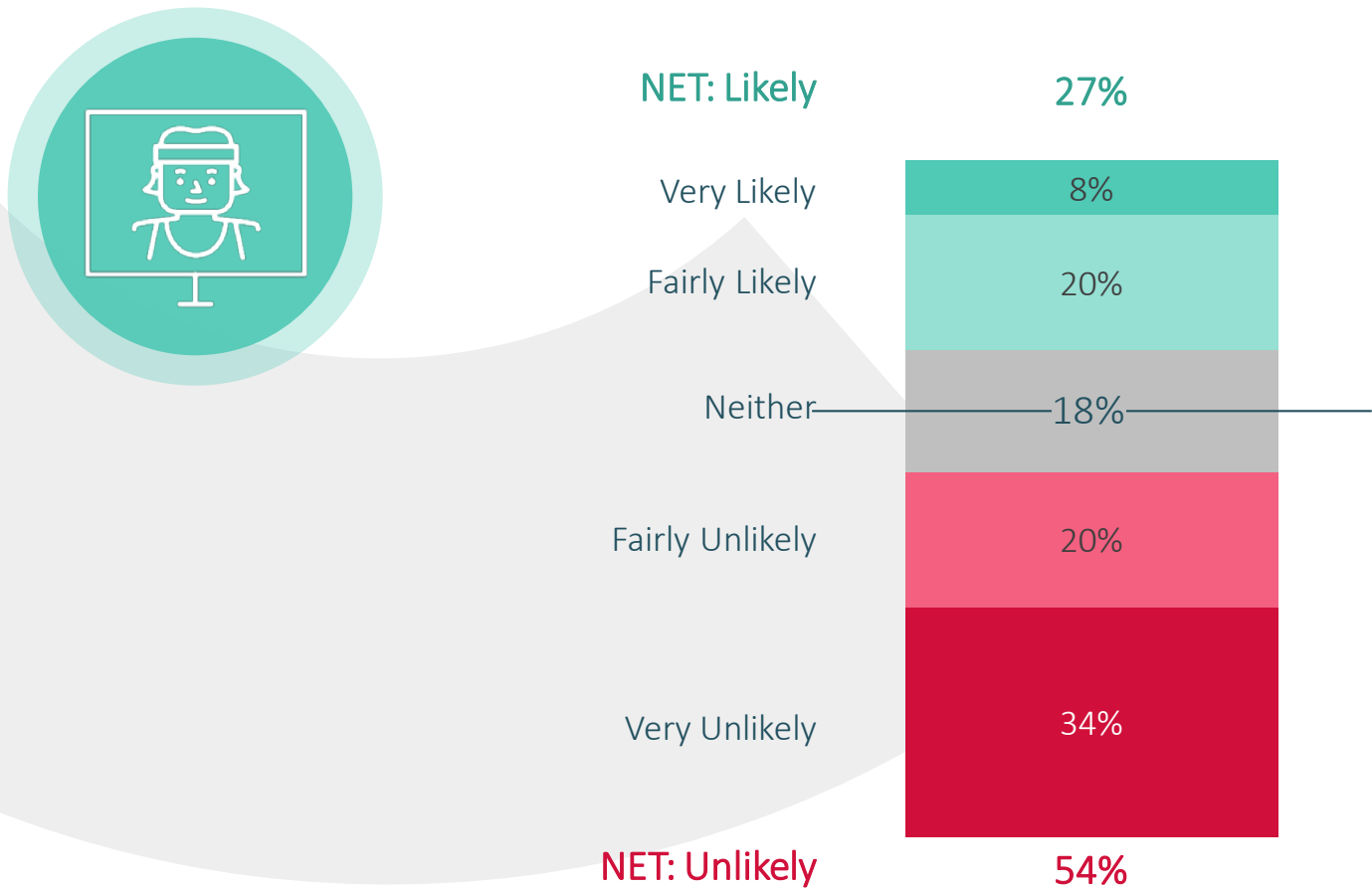


# More than 1 in 4 (27%) intend on using online exercise classes



Again, likelihood to participate is highest among 25-34 year olds (47%) and ABC1s (34%).

## Likelihood to Participate in an Online Exercise Class



NET Likely: Higher Among	
25-34 year olds	47%
ABC1s	34%



# Key Findings

# Key Findings: Electronic Health Records



1

Support for personal electronic health records has fallen. 7 in 10 (71%) are in favour of electronic health records, down from 8 in 10 (81%) in 2018.

2

9 in 10 (90%) believe that the introduction of electronic health records would have to be accompanied by strong cyber security measures.

3

Over 4 in 5 (86%) of all adults say that electronic health records should be regulated according to national and international best practice.

4

More than half (57%) of adults are not comfortable with their records being available electronically.

# Key Findings: Virtual Health Clinics



1

Slightly more than half (53%) of all adults believe virtual health clinics are a good idea, with 25-34 year olds (68%) and ABC1s (60%) most supportive.

2

Nearly 9 in 10 (87%) feel that virtual health clinics exclude those who do not have access to technology, while over than half (56%) are concerned about privacy and security of virtual health clinics.

3

Nearly 3 in 10 (29%) have used virtual health clinics during COVID crisis; the use of virtual health clinics has grown strongly since the beginning of the pandemic. Additionally, 7 in 10 (70%) virtual health clinic users rate their experience positively.

4

Half (50%) of all adults say that they are likely to take part in a virtual health clinic in the future; likelihood is strongest among those aged 25-34 years old (60%) and ABC1s (55%).

# Key Findings: Online Exercise Classes



1

Nearly 1 in 5 (18%) have taken part in an online exercise class in the past. Online exercise classes have become more popular during COVID.

2

25-34 year olds(34%), ABC1s (26%) and Dublin residents (26%) are most likely to have taken part in online exercise classes in the past.

3

Among those that have previously participated in an online exercise class, 3 in 4 (76%) rate their experience as either 'Excellent' or 'Good'.

4

More than 1 in 4 (27%) of all adults say that they are likely to participate in online exercise classes in the future. Again, likelihood is highest among 25-34 year olds (47%) and ABC1s (34%).



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