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Envision Solutions Insight Report: Trust & The Health Web

July 2008



The first in a series of studies examining how
Americans are using various interactive technologies for health.

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About Envision Solutions, LLC

Envision Solutions, LLC is a full-service healthcare marketing communications consulting firm. The company provides innovative products and services to not-for profit and for-profit organizations. Its core competencies are in the areas of analysis, strategic and tactical recommendation development, training and content development.

Please visit www.envisionsolutionsnow.com for more information about the firm or call 212-501-6101.

I. Introduction

During the past decade, numerous studies have conclusively demonstrated that the Internet has become an important resource for Americans seeking to take care of themselves or others. For example, Harris Interactive reported that 71% of US adults looked for health information online in 2007.[1]

The growing popularity of the Internet has led to concerns that people are using it irresponsibly. A 2006 Pew Internet & American Life Project report indicated that 75% of online health searchers do not check the source and date of the information they find online.[2] However, there is evidence most Americans view the Internet skeptically. In January 2008, digital marketing company iCrossing reported that only 24% of consumers list the Internet as one of their most trusted sources of health information.[3]

Question:

We know Americans are using blogs, online forums and other social technologies for health, but do they view them as highly credible information sources?

Over the past few years, Americans searching for health content online have been increasingly exposed to social technologies like blogs, online forums and wikis such as Wikipedia. iCrossing found that “34% of health searchers use [these] resources to delve into health and wellness topics.” The company concluded that these technologies help to “facilitate the sharing of information with others on topics that directly affect their healthcare decisions.”[3]

Given the increasing popularity of online health information – including content developed by medical professionals and patients using social technologies – Envision Solutions decided to commission a national online survey of US adults to answer the following questions:

- Is the Internet influencing Americans’ trust in medical professionals?
- Are significant numbers of Americans beginning to view patient-developed online health information as credible?

- How are major institutions, including government, the media and non-profits fairing? Do Americans view them as their most trusted sources of health information?
- Does race, gender and age influence trust of medical professionals and online patient/provider-generated content?

We present the key results of our research below.

II. Americans Questioning Trusted Health Providers

Insight:

Americans are using health information they find online to critically evaluate medical advice.

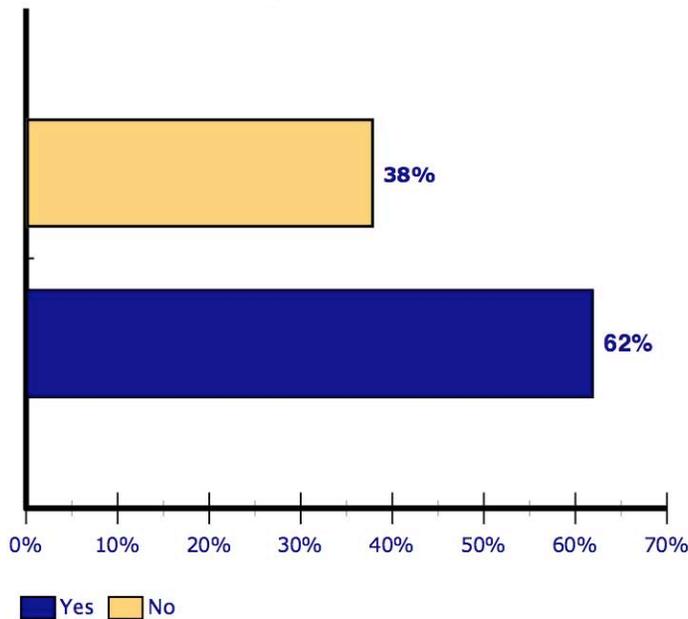
Increasingly, Americans are arming themselves with online health content before or after they consult a medical professional. Our research indicates that the Internet and the guidance of family and friends are causing many US adults to view health providers' advice with a skeptical eye. Surprisingly, almost four in ten (38%) Americans admit they have doubted a

medical professional's opinion or diagnosis because of information they read on the Internet. This figure translates to 85.6 million US adults.

Internet Sowing Doubt

Have you ever doubted a medical provider's opinion or diagnosis because it conflicted with information you had read on the Internet? (n = 1,000 US Adults, 18+)

Source: Envision Solutions, LLC



Women & The Young Among Most Likely To Express Skepticism

Insight:

Young adults may be more trusting of online content because they are heavy Internet users.

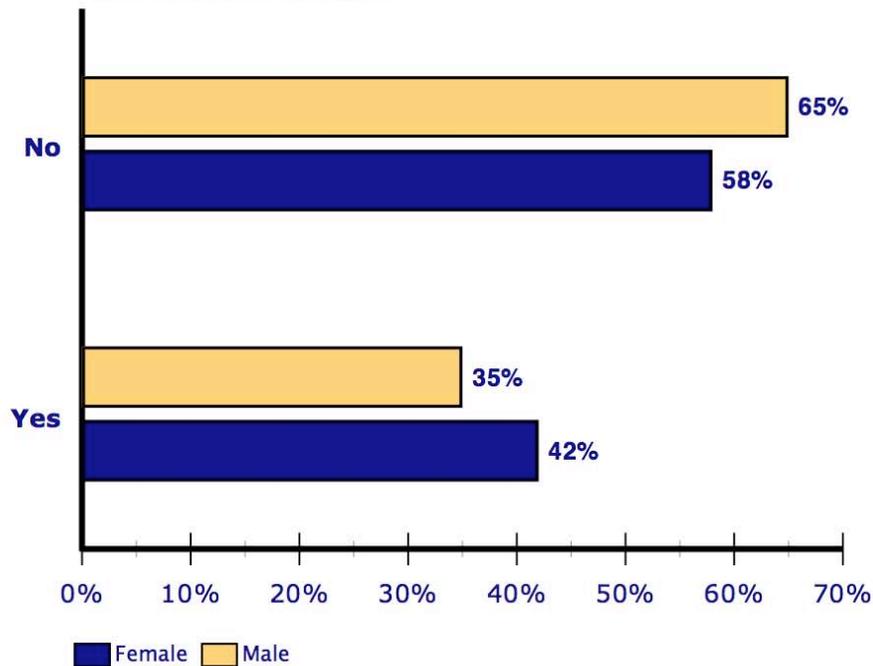
Interestingly, women and the young are most likely to be skeptical of a provider's advice if it does not align with online health content. Forty-two percent of women versus 35% of men say the Internet has caused them to question a medical professional.

In addition, four in ten (43%) of adults ages 18 – 34 report being suspicious of a diagnosis when the Internet says otherwise.

Women More Skeptical Than Men

Have you ever doubted a medical provider's opinion or diagnosis because it conflicted with information you had read on the Internet? (n = 1,000 US Adults, 18+)

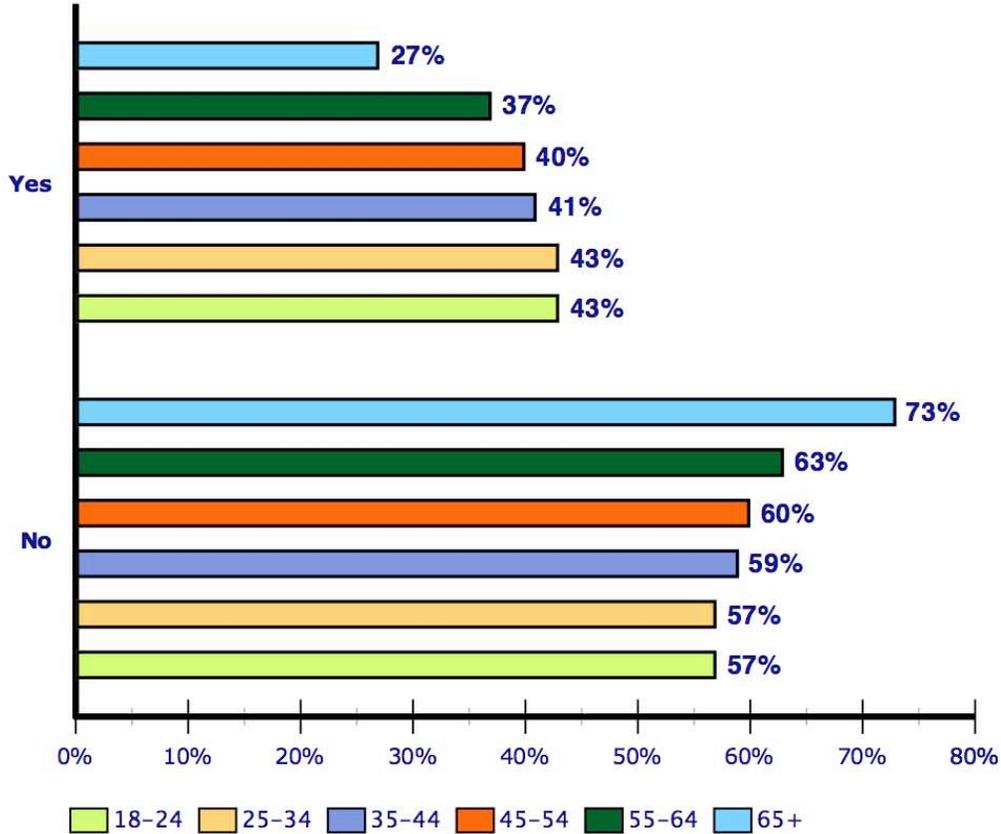
Source: Envision Solutions, LLC



Older Americans More Likely To Retain Trust

Have you ever doubted a medical provider's opinion or diagnosis because it conflicted with information you had read on the Internet? (n = 1,000 US Adults, 18+)

Source: Envision Solutions, LLC



III. Medical Professionals Still Highly Trusted, But Other Information Sources Gaining Ground

Insight:

Trust of non-health provider information sources may be influenced by disease severity.

While the Internet is causing many Americans to think twice about advice from medical professionals, our research indicates they are still highly trusted. However, increasingly other sources, such as friends, family and patient and expert-generated content, are gaining ground. This is especially true for people seeking advice about

how to manage mild medical conditions. Forty two percent of Americans view providers as their most trusted source of information about these types of illnesses. Interestingly, the same percentage (42%) report they would rely on online and familial/business resources.

Americans Trust Providers & Online/Family/Business Sources Equally For Information About Mild Health Conditions

If you were seeking advice about how to manage a MILD medical condition (such as a cold or sinus infection), which ONE of the following sources would you be MOST LIKELY to trust for guidance on the subject?	
Response	%
Your Primary Healthcare Provider (Such As Your Doctor Or Nurse)	42%
Family, Friends Or Significant Other	24%
Physicians Or Other Healthcare Providers Posting Information About The Condition On Blogs, Online Forums, Or Other Websites	13%
People Who Have Or Had The Condition Posting Information About It On Blogs, Online Forums, Or Other Websites	3%
Co-Workers Or Other Colleagues	2%
Total % Of Americans Relying On Online/Familial/Business Sources	42%

Source: Envision Solutions, LLC

Unsurprisingly, when it comes to serious medical conditions, health providers earn much higher marks. Sixty-seven percent of Americans say they would be most likely to trust medical professionals for information about an illness like cancer, diabetes or high blood pressure. In contrast, only 21% listed online and personal sources as highly credible.

Americans View Health Providers As Most Credible Source For Information About Serious Health Conditions

If you were seeking advice about how to manage a SERIOUS medical condition (such as cancer, diabetes, or high blood pressure), which ONE of the following sources would you be MOST LIKELY to trust for guidance on the subject?	
Response	%
Your Primary Healthcare Provider (Such As Your Doctor Or Nurse)	67%
Family, Friends Or Significant Other	4%
Physicians Or Other Healthcare Providers Posting Information About The Condition On Blogs, Online Forums, Or Other Websites	13%
People Who Have Or Had The Condition Posting Information About It On Blogs, Online Forums, Or Other Websites	3%
Co-Workers Or Other Colleagues	1%
Total % Of Americans Relying On Online/Familial/Business Sources	21%

Source: Envision Solutions, LLC

IV. Once Trusted Institutions Earn Low Marks

Insight:

Surprisingly, few Americans rank the media, non-profits and government as highly trusted sources of health information.

Contrary to conventional wisdom, this study indicates that the vast majority of Americans do not view major institutions such as the media, government and non-profits as highly trustworthy sources of health information.

Only 1% of Americans said they would be most likely to trust these entities if they needed guidance on a serious or mild medical condition. Surprisingly, given

the managed care industry's poor public reputation, more Americans said they would rely on insurers.

Trust Of Media, Government, Non-Profits Lags Behind Managed Care

Institution	% Most Likely To Trust (Serious Condition)	% Most Likely To Trust (Mild Condition)
Government Or Non-Profit Organization	1%	1%
Media Outlets (Such As Magazines Or Newspapers)	1%	1%
Health Insurance Provider	5%	5%
Pharmaceutical Firm	1%	2%

Source: Envision Solutions, LLC

These organizations scored similarly low marks when Americans were asked to consider which source they would turn to first if they thought they had a medical problem or disease.

Information Sources Americans Would Consult First If They Had A Medical Problem

Which one of the following sources would you be MOST LIKELY to consult FIRST when you think you may have a medical problem or a disease?	
Response	%
Your Primary Healthcare Provider (Such As Your Doctor Or Nurse)	56%
Family, Friends Or Significant Other	16%
Physicians Or Other Healthcare Providers Posting Information About The Condition On Blogs, Online Forums, Or Other Websites	13%
Your Health Insurance Provider	4%
People Who Have Or Had The Condition Posting Information About It On Blogs, Online Forums, Or Other Websites	3%
Co-Workers Or Other Colleagues	2%
Media Outlets (Such As Magazines Or Newspapers)	1%
Government Or Non-Profit Organizations	1%
Pharmaceutical Firms	1%
Other	2%

Source: Envision Solutions, LLC

V. Hesitant Hispanics

Insight:

Unlike other racial groups, Hispanics are most likely to rely on friends and family for medical information.

Unlike people from other ethnic backgrounds, Hispanic Americans are least likely to view providers as their most trusted resource for health information. Instead, many viewed friends and family as highly credible. For example, when it comes to serious illnesses such as cancer, diabetes or high blood pressure, less than half (45%) say they would most

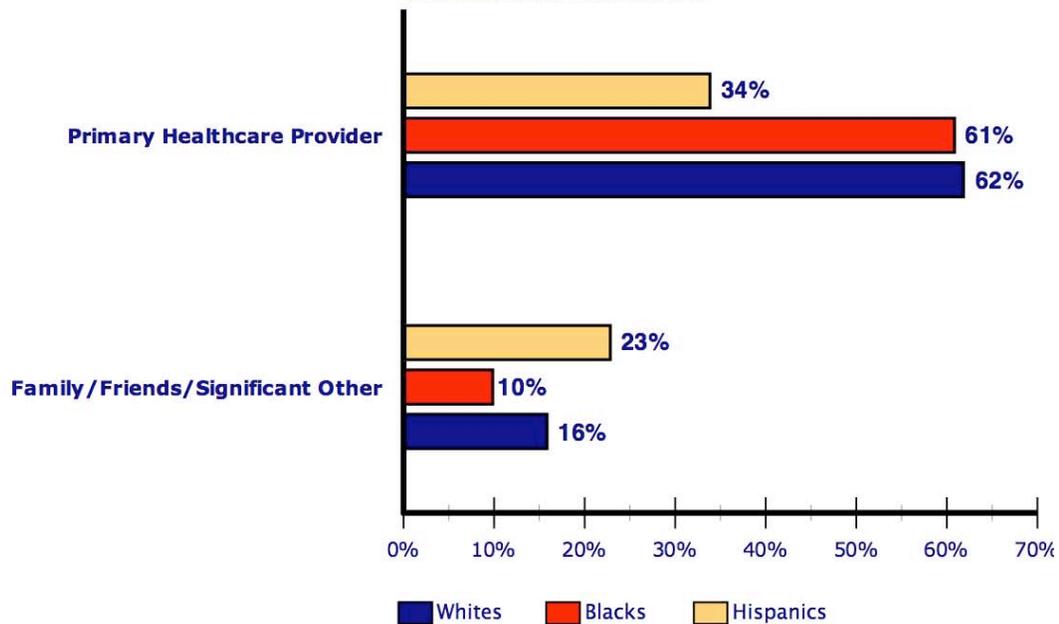
likely trust a medical professional for guidance versus 72% of whites and 72% of African-Americans.

In addition, 23% of Hispanics said they would consult friends and family first when they think they have a medical problem. Thirty-four percent said they would initially see a medical professional.

Hispanics Most Likely To Consult Friends & Family First

Which ONE of the following sources would you be MOST LIKELY to consult FIRST when you think you may have a medical problem or a disease? (n = 940 US Adults, 18+)

Source: Envision Solutions, LLC



VI. Examining Perceptions Of Expert Versus Patient-Generated Content

Insight:

In general, Americans have more confidence in provider-generated content. This is not surprising given that most view medical professionals as highly credible.

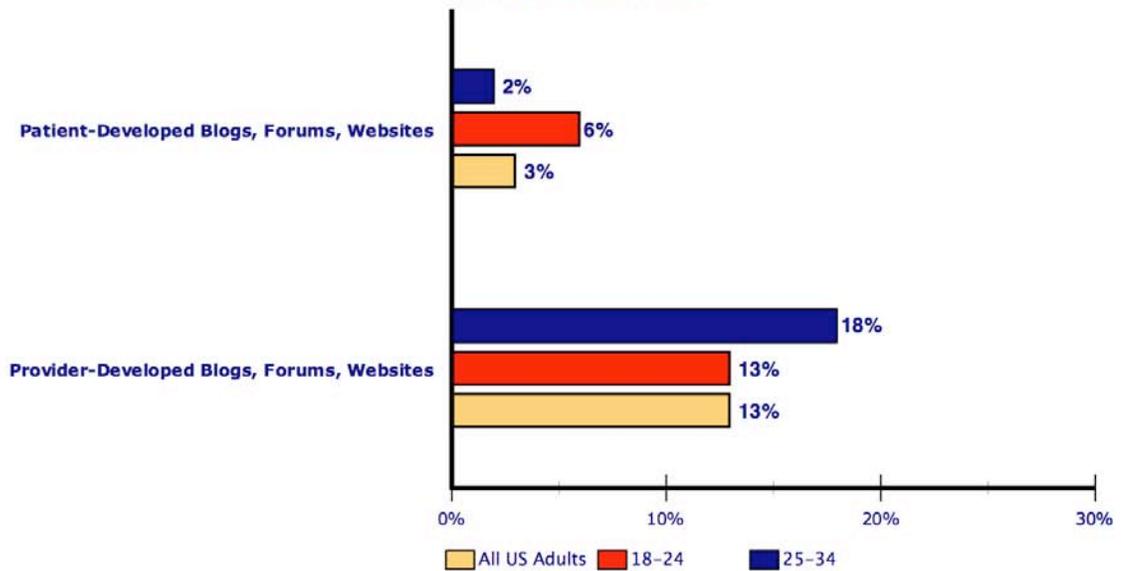
Currently, about one-third of US consumers have used social technologies like blogs and online forums for health and wellness purposes.[3] In addition, patients and healthcare providers are actively creating content online. Given the increasing popularity of these Web resources, we decided to investigate whether the general American population views them as highly trusted sources of health information.

With regard to serious *and* mild medical conditions, we found that 16% of Americans believe information featured on blogs, online forums and other Websites is credible (see page 9 for data).

Serious Conditions: Young More Trusting Of Patient & Provider Content Than General US Adult Population

If you were seeking advice about how to manage a SERIOUS medical condition (such as cancer, diabetes, or high blood pressure), which ONE of the following sources would you be MOST LIKELY to trust for guidance on the subject? (n= 1,000 US Adults, 18+)

Source: Envision Solutions, LLC



Insight:

The youngest adults report more confidence in patient-generated content, but less trust in health providers' advice.

However, 13% view provider-created content as trustworthy versus 3% who see patient-generated content this way.

In contrast, we found that younger Americans tend to be much more confident of medical information developed by patients and providers.

For example, 18% of 25 - 34 year olds said they

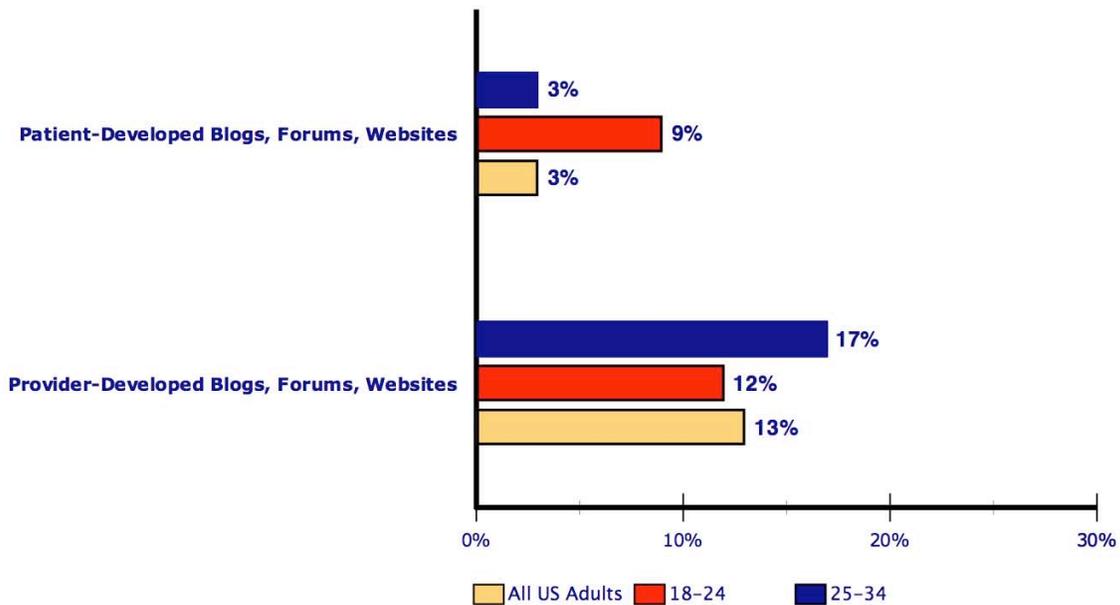
would be most likely to trust a provider-developed blog, forum or Website for information about a serious condition.

In addition, 9% of those between 18 and 24 said they believe patient-developed online content is highly credible (when seeking advice about a mild medical condition).

Mild Conditions: Young More Trusting Of Patient & Provider Content Than General US Adult Population

If you were seeking advice about how to manage a MILD medical condition (such as cancer, diabetes, or high blood pressure), which ONE of the following sources would you be MOST LIKELY to trust for guidance on the subject? (n= 1,000 US Adults, 18+)

Source: Envision Solutions, LLC



VII. Final Thoughts

Insight:

While Americans are skeptical of online content, it is having an impact on their medical decisions.

This study reveals that Americans are being profoundly impacted by online health content even if they are skeptical about whether it is credible and reliable. This ambivalent relationship with the Internet is revealed in Americans' interactions with health providers. While they instinctually trust medical professionals, most are actively comparing

and contrasting advice by physicians and nurses with what they find online.

In addition, government, non-profits and the media should be very concerned that Americans' trust in these institutions appears to be at a low ebb. These organizations play a large role in educating the public about health, but their messages may be ignored if they are not viewed as credible.

Finally, social technologies have only just begun to have an impact on the health industry. Given this, it is remarkable that millions of Americans view blogs, online forums and other Websites as highly trustworthy sources of medical information. However, we should be careful not to overestimate the current impact of patient-generated content on healthcare decision-making.

References

1. Anonymous. *Harris Poll Shows Number of "Cyberchondriacs" – Adults Who Have Ever Gone Online for Health Information – Increases to an Estimated 160 Million Nationwide*. 2007 July 31 [cited 2008 July 21]; Available from: http://www.harrisinteractive.com/harris_poll/index.asp?PID=792.
2. Fox, S., *Online Health Search 2006*. Pew Internet & American Life Project: Washington, DC.
3. Elkin, N., *How America Searches: Health and Wellness*. 2008, iCrossing.

Methodology

Kelton Research conducted this Envisions Solutions study between July 17 and July 21 2008 using an email invitation and an online survey. Quotas were set to ensure reliable and accurate representation of the total U.S. population. Kelton surveyed 1,000 Americans ages 18 and older.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results.

In this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 3.1 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

About Kelton Research

Kelton Research is a full service market research consultancy with offices in Los Angeles, New York, and Washington DC. Kelton serves as a strategic partner to both Fortune 500 corporations and smaller companies, utilizing a wide range of qualitative and quantitative methodologies to drive tactical recommendations for clients. More information on Kelton Research can be found at www.keltonresearch.com.