THE GREAT AMERICAN SEARCH FOR

HEALTHCARE INFORMATION

INTRODUCTION

The Great American Search for Healthcare Information is a study based on a survey of 1,700 American adults. It was commissioned by global communications and marketing services firm Weber Shandwick in partnership with KRC Research. The survey focused on Healthcare Information Seekers, those who look for health-related information at least once per year, excluding their doctor appointments.

There is a ravenous appetite for healthcare information in this nation. The vast majority of Americans (81%) are Healthcare Information Seekers; that is, eight in 10 look for health-related information at least once a year. More than half of Americans seek it on a weekly (18%) or monthly (34%) basis. Underscoring their appetite for health information, three-quarters of Americans (74%) report that they pay attention to health-related information in the news. In an era of information overload, healthcare undoubtedly commands a sizable proportion of attention.

The Internet facilitates healthcare information gathering. The study finds that nearly three-quarters of Americans (73%) obtain health-related information from the Internet. This is a substantial increase since a 2013 study from the Pew Research Center's Internet & American Life Project found that 59% of U.S. adults looked online for health information in the past year.[1] This appetite will further accelerate as new technologies provide access to health information in unprecedented ways. Indeed, 55% of Healthcare Information Seekers in our new study report that they are relying more on the Internet and electronic sources for their health-related information than they were just five years ago.

Given the demand for health-related information and the ever-increasing ways in which information can be accessed, trust in what consumers see and ultimately use is critically important — not just for their own health and well-being, but also for the success of companies in the healthcare sector that provide this valuable information. This report reveals how Americans access, use and feel about health-related information and shines a light on how what they access is not necessarily the same as what they trust. Our guide to engaging Americans with credible healthcare information helps healthcare industry marketers and communicators consider their approach to developing and delivering trusted and engaging information to patients and customers.

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In a time of information-overload and cynicism inflamed by 'fake news,' communicators and marketers face new and unique challenges around how to effectively engage with their customers. But as the demand for online information grows, and as the landscape continues to be increasingly muddied by inaccurate — and at times dangerous — information, the healthcare and pharmaceutical sectors have a greater responsibility than ever before to find ways to create and deliver engaging, relevant and factual information.

Laura Schoen, President, Global Healthcare Practice, Weber Shandwick

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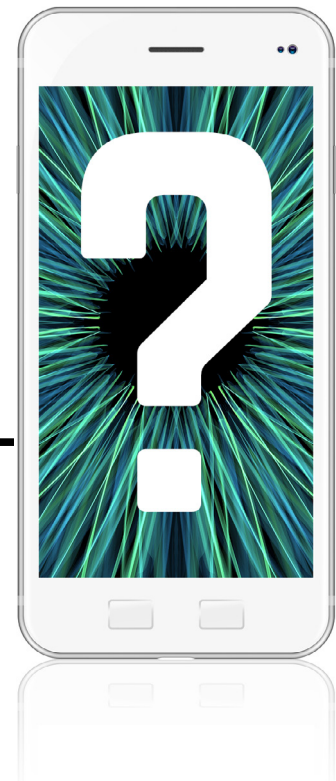
[1] "Health Online 2013," Pew Research Center's Internet & American Life Project.
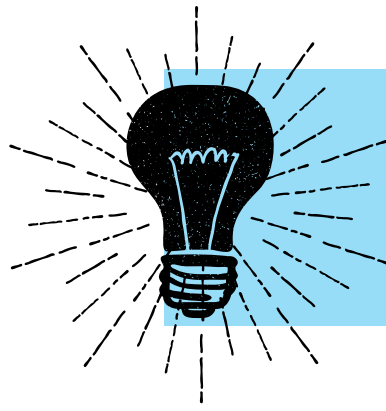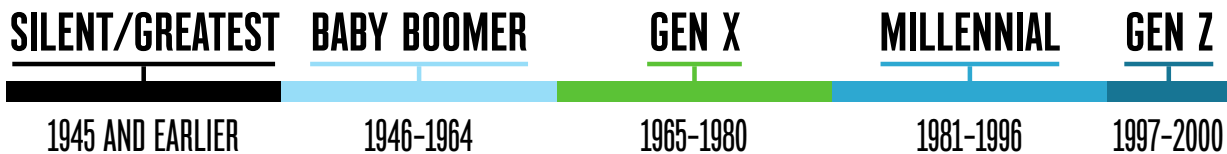
ABOUT THE RESEARCH

Weber Shandwick, in partnership with KRC Research, conducted a 20-minute national survey of 1,700 American adults age 18 and over. The sample was drawn from a large national consumer panel and conducted online and also by telephone to reach seniors 65 years and older. Data was weighted to be demographically representative of U.S. adults based on census reference data. Interviews took place from May 14 to June 1, 2018.

The generations that are reported in the study follow those as defined by Pew Research. Here are the birth year ranges of the sample:

SILENT/GREATEST	BABY BOOMER	GEN X	MILLENNIAL	GEN Z
1945 AND EARLIER	1946–1964	1965–1980	1981–1996	1997–2000

WEBER SHANDWICK IDENTIFIED SIX INSIGHTS ON HOW AMERICANS SEARCH FOR AND GATHER HEALTHCARE INFORMATION TODAY. THEY ARE AS FOLLOWS:

1. Illness and Medication Lead the Need for Information

2. Availability vs. Credibility: The Pros and Cons of Healthcare Information Today

3. Healthy Doses of Skepticism Abound About Health Information on Social Media

4. Similar Usage of Digital Health Products Across Generations

5. Medical Professionals — Not Necessarily Doctors — Provide the Most Satisfactory Information

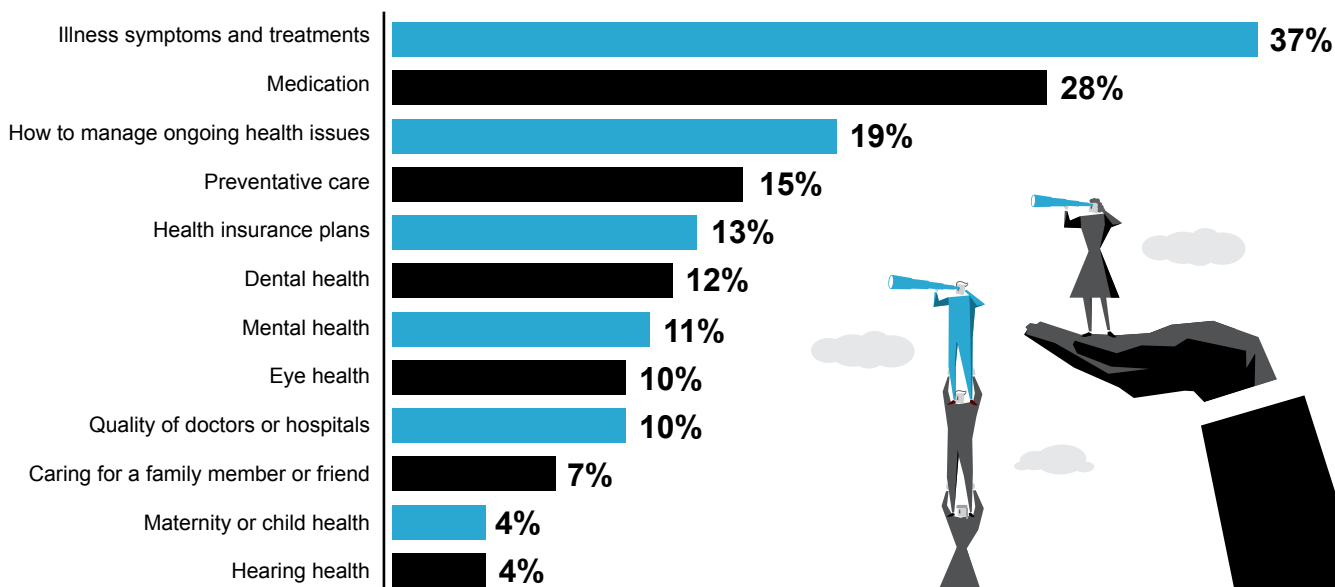6. Physicians May Have a Millennial Problem

SIX INSIGHTS

INTO THE GREAT AMERICAN SEARCH FOR HEALTHCARE INFORMATION

1. ILLNESS AND MEDICATION LEAD THE NEED FOR INFORMATION

The survey asked all Healthcare Information Seekers what types of health-related information they searched for most recently. Illness symptoms/treatments and medication are most frequently cited (37% and 28%, respectively). Preventative care is sought by only 15%.

TYPES OF HEALTH-RELATED INFORMATION LOOKED FOR MOST RECENTLY
(% Healthcare Information Seekers)

Category	Percentage
Illness symptoms and treatments	37%
Medication	28%
How to manage ongoing health issues	19%
Preventative care	15%
Health insurance plans	13%
Dental health	12%
Mental health	11%
Eye health	10%
Quality of doctors or hospitals	10%
Caring for a family member or friend	7%
Maternity or child health	4%
Hearing health	4%

Illness symptoms/treatments and medication are ranked highest by all but two generations:

- Gen Zs rank mental health at the top of their list (34%)

- Silent/Greatest generation members identify both medication and ongoing health issues management as their top search topics (26% each)

2. AVAILABILITY VS. CREDIBILITY: THE PROS AND CONS OF HEALTHCARE INFORMATION TODAY

Healthcare Information Seekers see the benefits of healthcare information availability today. Half or more agree that benefits include the ability to fact-check information (54%), easy-to-find information (54%) and the abundance of information that can be found on any topic (50%). For the most part, older generations are more likely to attest to these benefits than younger generations. Perhaps the younger Healthcare Information Seekers take these benefits for granted because they have grown up with readily-available information.

BENEFITS RELATED TO THE AVAILABILITY OF HEALTH-RELATED INFORMATION
(% Healthcare Information Seekers)

|	Total	Gen Z	Millennial	Gen X	Boomer	Silent/ Greatest
The ability to fact-check other information for yourself	54%	50%	45%	57%	60%	65%
The ease with which you can find health-related information	54%	40%	48%	55%	62%	67%
The amount of health-related information that can be found on any topic	50%	39%	41%	49%	61%	59%
The number of medical professionals that you can contact for health-related information	36%	48%	29%	30%	38%	70%

Despite the reported advantages of healthcare information, concerns abound, particularly when it comes to credibility. Among a list of potential information apprehensions presented in the survey, respondents' most notable is false or misleading health-related information (52%), followed by health-related information that is trying to sell something (47%). Again, concerns generally rise with age.

Three in 10 Healthcare Information Seekers (29%) are concerned about companies tracking what they search for, possibly indicating a nascent issue that may impede healthcare information seeking in the future.

CONCERNS WITH HEALTH-RELATED INFORMATION
(% Healthcare Information Seekers)

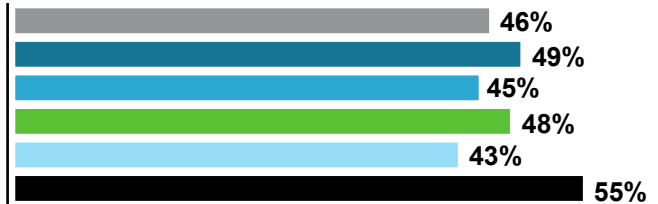|	Total	Gen Z	Millennial	Gen X	Boomer	Silent/ Greatest
False or misleading health-related information	52%	47%	41%	51%	64%	62%
Health-related information that is trying to sell products or services	47%	36%	36%	46%	59%	60%
Medical or health-related research studies that seem to contradict one another	43%	34%	40%	39%	51%	48%
Health-related information that is hard to understand	31%	31%	28%	32%	28%	45%
Companies tracking the health-related information you search for	29%	35%	23%	26%	37%	32%
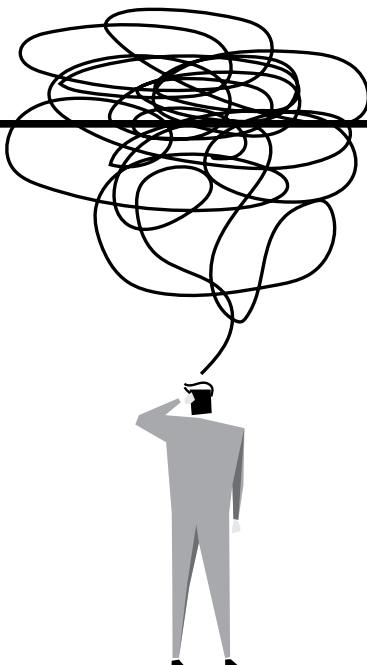
Perhaps this credibility gap prompts Healthcare Information Seekers to apply multiple checks and balances in their quest for information to feel more assured about the information they receive. Seven in 10 (70%) report they do their own research after their doctor visit and nearly as many, 66%, do this research prior to going to their doctor.

The credibility gap is further widened by confusion over perceptions of conflicting facts and complicated information (46% and 45%, respectively). To a lesser extent, Healthcare Information Seekers report they lack confidence in their ability to get reliable information (29%), a sentiment that is most pronounced among the Millennial generation (42%). Millennials are also the group of people most likely to agree that most health-related information is too complicated (55%). These are areas that need to be addressed by healthcare communicators and marketers before they turn off this generation.

COMPLICATIONS OF HEALTH-RELATED INFORMATION
(% Healthcare Information Seekers who strongly/somewhat agree)

I don't know which sources of health-related information to believe because there are so many conflicting facts
- Total: 46%
- Gen Z: 49%
- Millennial: 45%
- Gen X: 48%
- Boomer: 43%
- Silent/Greatest: 55%

Most health-related information is too complicated
- Total: 45%
- Gen Z: 50%
- Millennial: 55%
- Gen X: 43%
- Boomer: 35%
- Silent/Greatest: 42%
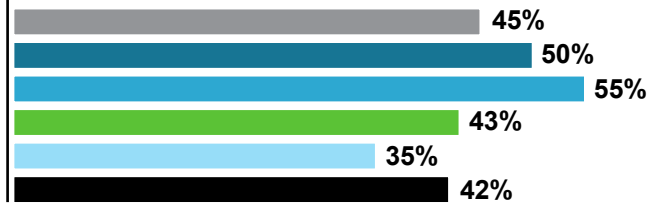
I don't have confidence in my ability to get reliable health-related information
- Total: 29%
- Gen Z: 32%
- Millennial: 42%
- Gen X: 24%
- Boomer: 18%
- Silent/Greatest: 23%
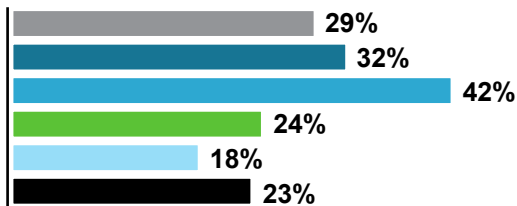
Legend: Total · Gen Z · Millennial · Gen X · Boomer · Silent/Greatest

3. HEALTHY DOSES OF SKEPTICISM ABOUND ABOUT HEALTH INFORMATION ON SOCIAL MEDIA

Two-thirds of American Healthcare Information Seekers (67%) report that they see health information on social media. Seeing is not necessarily believing, however. More than eight in 10 Healthcare Information Seekers who are exposed to health information on social media (83%) are concerned about incorrect or misleading medical information, and only 35% report that, in their experience, the information is mostly accurate. Slightly more, 38%, say they have no idea of its veracity and 27% say it is mostly inaccurate. These numbers indicate that people exposed to health information through social media recognize how hard it is to know what is true, especially in the face of complex information and seemingly conflicting facts or studies.

Particularly compelling about this data is that concerns about and experiences with accuracy of social health information are consistent across generations. For example, the youngest cohort in our study, Gen Z, is just as likely to be concerned about incorrect or misleading information as the much older Boomer generation (91% and 87%, respectively). This suggests that social media familiarity or proficiency do not have a bearing on perceptions of legitimacy, leading to the conclusion that it is the content or channel that is the challenge for health-related information communicators.

83% OF HEALTHCARE INFORMATION SEEKERS WHO ARE EXPOSED TO HEALTH INFORMATION ON SOCIAL MEDIA ARE CONCERNED ABOUT INCORRECT OR MISLEADING MEDICAL INFORMATION

CONCERN ABOUT ACCURACY OF HEALTH-RELATED INFORMATION ON SOCIAL MEDIA
(% Healthcare Information Seekers who use social media)

Total · Gen Z* · Millennial · Gen X · Boomer · Silent/Greatest*

Very or somewhat concerned about incorrect or misleading medical and health information on social media sites

- Total: 83%
- Gen Z*: 91%
- Millennial: 80%
- Gen X: 84%
- Boomer: 87%
- Silent/Greatest*: 74%

*Small sample size

REPORT THAT THE HEALTH-RELATED INFORMATION THEY HAVE SEEN ON SOCIAL MEDIA IS...
(% Healthcare Information Seekers who use social media)

Mostly accurate · Mostly Inaccurate · Not sure/have no idea

	Total	Gen Z*	Millennial	Gen X	Boomer	Silent/Greatest*
Mostly accurate	35%	34%	41%	33%	28%	29%
Mostly Inaccurate	27%	34%	32%	22%	24%	27%
Not sure/have no idea	38%	32%	27%	45%	48%	44%
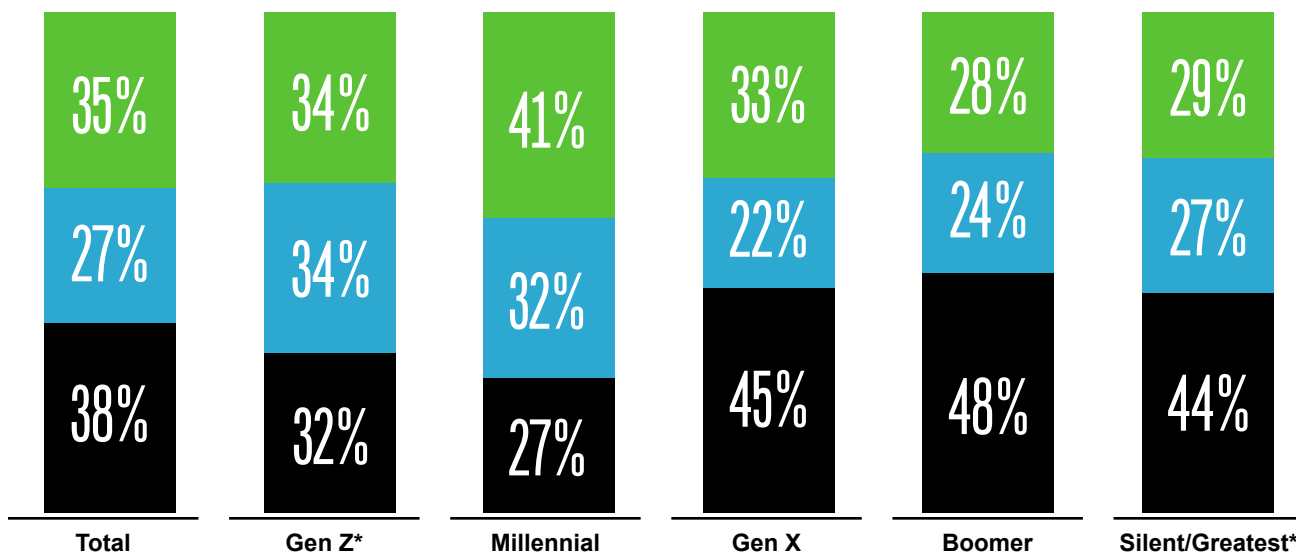
*Small sample size

While health information on social media has a credibility problem, Healthcare Information Seekers exposed to it identify several solutions for instilling more confidence. Healthcare information on social media should:

- be cited by a medical professional (43%)

- cite a scientific study (38%)

- be associated with a trusted brand (37%)

- be cited by a trusted school or research organization (36%)

The findings reveal a demand and an opportunity. Healthcare Information Seekers want medical information on social media to be verified by respected third-party sources.

4. SIMILAR USAGE OF DIGITAL HEALTH PRODUCTS ACROSS GENERATIONS
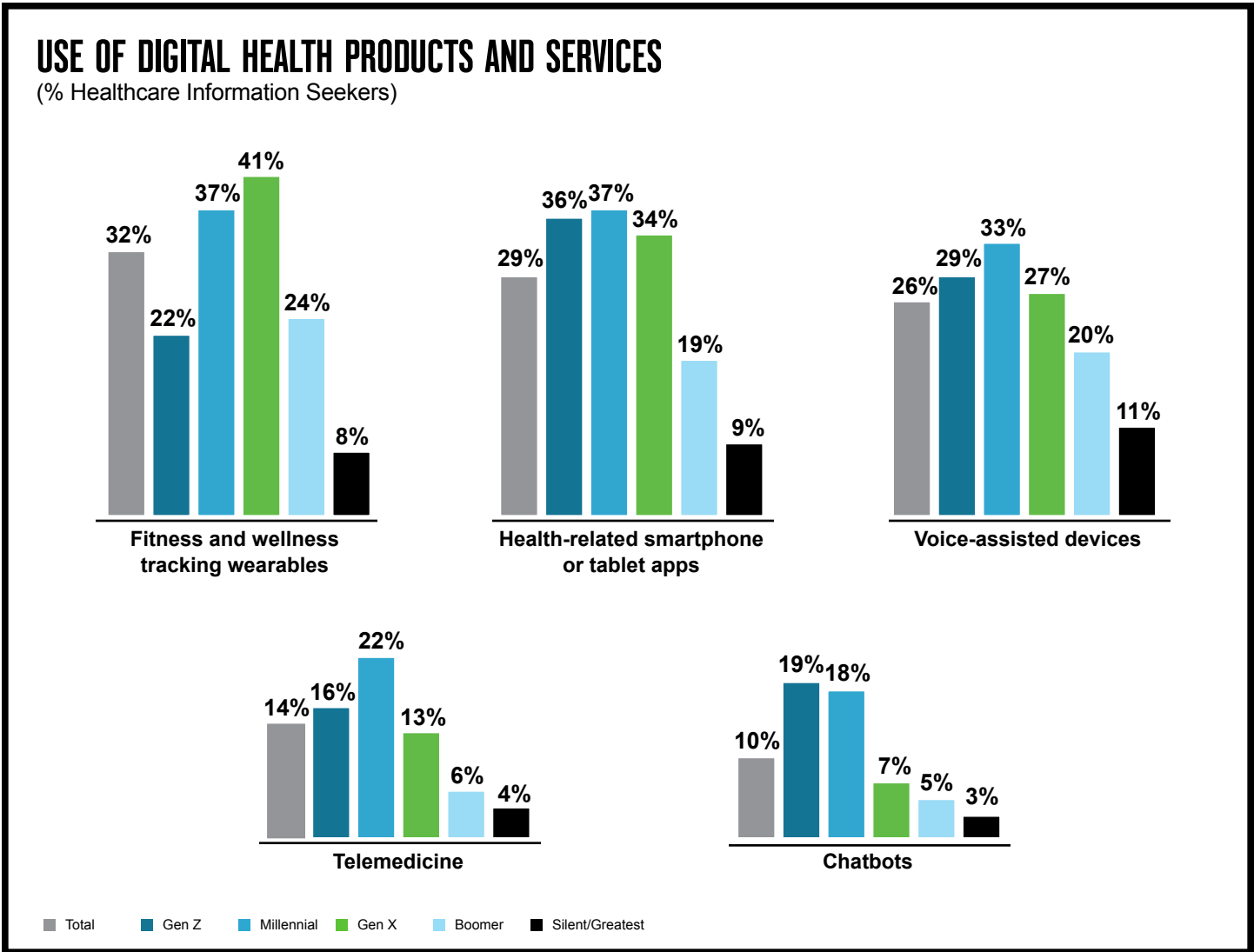
The survey prompted Healthcare Information Seekers with a list of digital products and services to determine which, if any, they have used. Approximately three in 10 have used a fitness or wellness tracker (32%), a health-related app on their smartphone or tablet (29%), or a voice-assisted device for their health questions (26%). Much fewer have used telemedicine (14%) or chatbots (10%) for healthcare information.
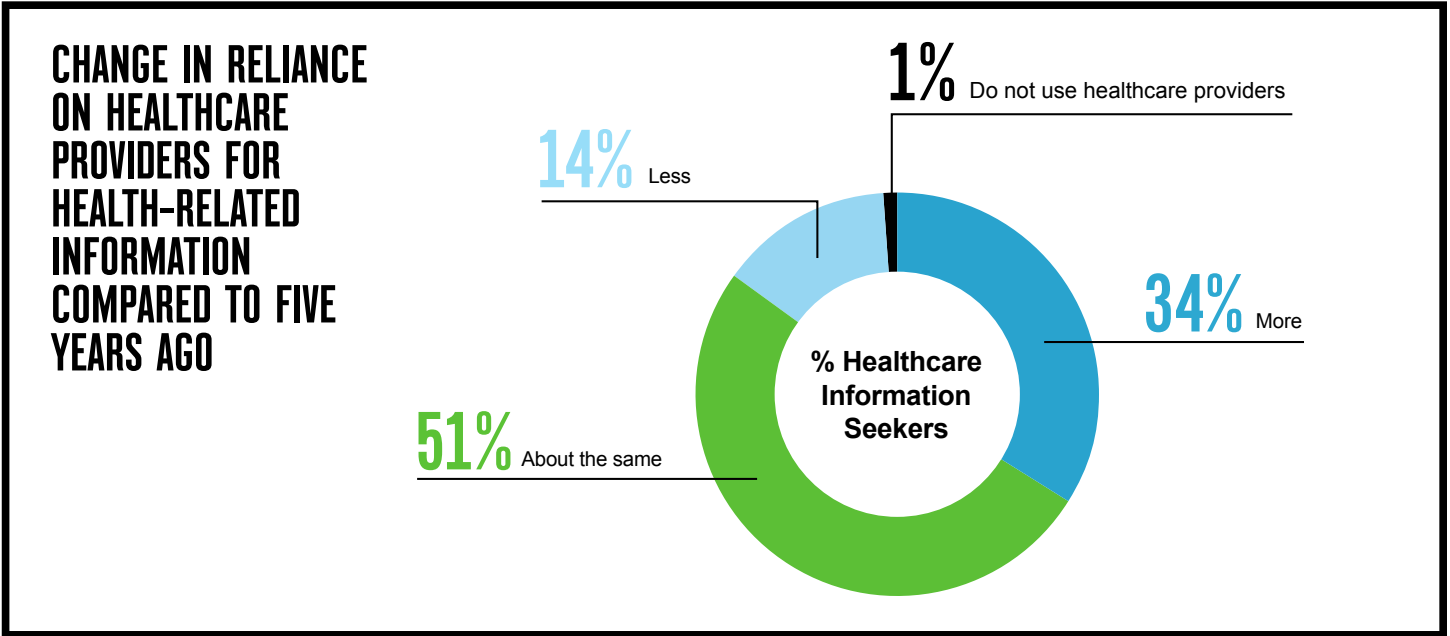
Usage of devices and apps is generally driven by Americans younger than Boomers. Interestingly, however, Gen Xers lead in wearables usage (41%) and surpass Gen Zs by nearly double (22%). But when it comes to telemedicine and chatbots, Gen Xers behave more like their older cohorts.

USE OF DIGITAL HEALTH PRODUCTS AND SERVICES
(% Healthcare Information Seekers)

Fitness and wellness tracking wearables
- Total: 32%
- Gen Z: 22%
- Millennial: 37%
- Gen X: 41%
- Boomer: 24%
- Silent/Greatest: 8%

Health-related smartphone or tablet apps
- Total: 29%
- Gen Z: 36%
- Millennial: 37%
- Gen X: 34%
- Boomer: 19%
- Silent/Greatest: 9%

Voice-assisted devices
- Total: 26%
- Gen Z: 29%
- Millennial: 33%
- Gen X: 27%
- Boomer: 20%
- Silent/Greatest: 11%

Telemedicine
- Total: 14%
- Gen Z: 16%
- Millennial: 22%
- Gen X: 13%
- Boomer: 6%
- Silent/Greatest: 4%

Chatbots
- Total: 10%
- Gen Z: 19%
- Millennial: 18%
- Gen X: 7%
- Boomer: 5%
- Silent/Greatest: 3%

Legend: Total | Gen Z | Millennial | Gen X | Boomer | Silent/Greatest

As these devices, apps and services become more prevalent health information resources for younger Americans, they, and the next generation of such products, will certainly be an important channel for companies to consider when developing accurate and engaging content. Lessons learned from the distrust found in social media health information should be red flags for developers of this burgeoning wave of apps and devices so that credible and trusted content is a top priority.

5. MEDICAL PROFESSIONALS — NOT NECESSARILY DOCTORS — PROVIDE THE MOST SATISFACTORY INFORMATION

One-third of Healthcare Information Seekers (34%) report that, compared to five years ago, they are relying more on healthcare providers, such as doctors, nurses and pharmacists for information. Only 14% say they are relying less on these professionals (the balance — 51% — report there has been no change). This indicates that despite a plethora of resources available to the information consumer, their reliance on medical professionals will likely grow, along with a greater demand for trusted information from these people.

CHANGE IN RELIANCE ON HEALTHCARE PROVIDERS FOR HEALTH-RELATED INFORMATION COMPARED TO FIVE YEARS AGO

1% Do not use healthcare providers

14% Less

34% More

51% About the same

% Healthcare Information Seekers

The survey asked Healthcare Information Seekers which sources they rely on most for the health-related information they searched for most recently. Overall, Healthcare Information Seekers are most likely to rely on medical information websites (53%), followed by medical doctors (48%).

SOURCE USED MOST RECENTLY TO SEEK HEALTH-RELATED INFORMATION*
(% Healthcare Information Seekers)

Source	%
Medical information website	53%
Medical doctor	48%
Family member	26%
Health insurance company	25%
Website that shows ratings of medical professionals	25%
Physician assistant or nurse	23%
Friend	21%

*Sources cited by 20% or more of Healthcare Information Seekers
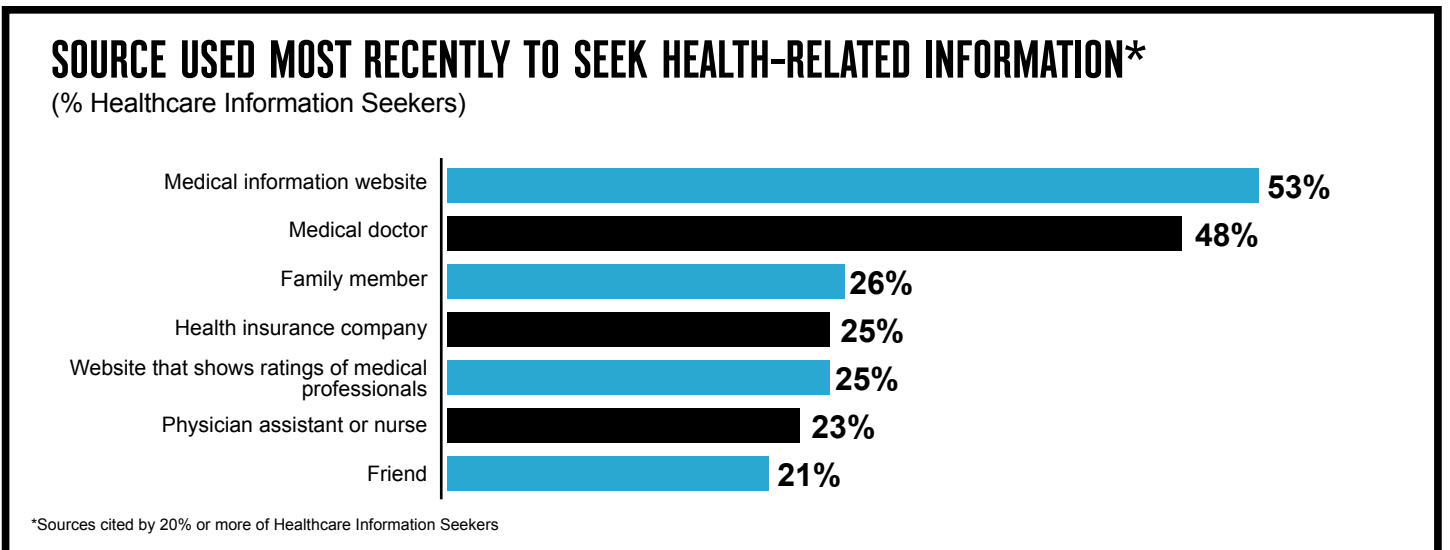
However, when it comes to satisfactory experiences with the information sources that are used today, medical professionals far surpass any other source. Healthcare Information Seekers who report being very satisfied with the information they receive put physician assistants/nurses and eye doctors at the very top of the list.

HEALTH-RELATED INFORMATION SOURCES HEALTHCARE INFORMATION SEEKERS ARE VERY SATISFIED WITH*

(% Healthcare Information Seekers who use respective source)

Source	%
Physician assistants or nurses	66%
Eye doctors	66%
Pharmacists	60%
Dentists	59%
Nurse practitioners	58%
Medical doctors	57%
Registered dietitians or nutritionists	54%
Chiropractors	46%
Physical therapists	44%
Department of Health and Human Services	44%
Family members	43%
Alternative medicine practitioners	41%
Medical information websites	39%
Professional medical journals	39%
Federal government organizations	37%
Health and wellness books	34%
Health insurance companies	34%
Patient organizations for specific disease conditions	34%
Social media influencers	33%
Medical societies	32%
Pharmaceutical companies	30%
Health and wellness magazines	29%
Social media groups	28%
Healthcare exchanges	26%
Websites that show ratings of medical professionals	26%
Online patient forums, message boards or support groups	25%
Medical news programs on TV, radio or podcasts	22%
Newspapers' health and wellness sections	20%

AVERAGE = 40%

*Sources used by 50 or more of Healthcare Information Seekers

Medical information websites fall just below average in terms of satisfaction (39%) despite their widespread use. This disparity may point to a significant opportunity for these platforms to put medical professionals behind the content, or make professionals' involvement more apparent.

6. PHYSICIANS MAY HAVE A MILLENNIAL PROBLEM

The Millennial generation is least likely to be satisfied with the information provided by medical doctors. In evaluating other attitudes toward physicians, the study suggests that doctors may be contending with a Millennial trust challenge. In addition to their lower satisfaction with information from doctors, Millennials are the least likely generation to say they always listen to their doctor(s), the most likely to believe that online health-related information is as reliable as information from medical professionals and the most likely to say they trust their peers more than medical professionals.
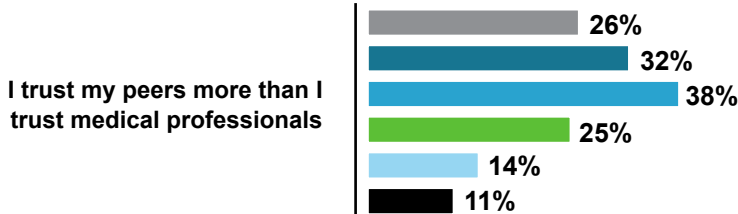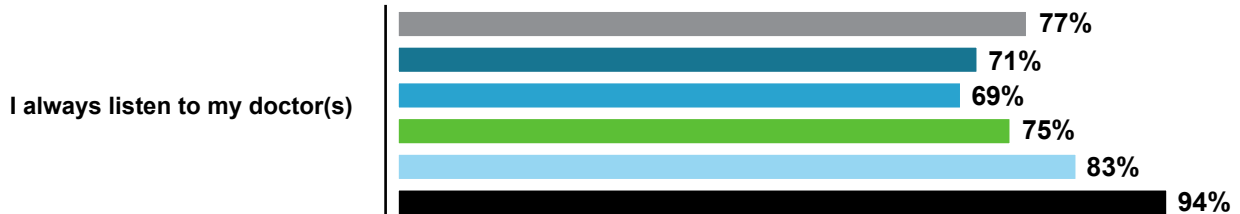
SATISFACTION WITH MEDICAL PROFESSIONALS
(% Healthcare Information Seekers)

Very satisfied with information from medical doctor
- 57%
- 62%*
- 49%
- 55%
- 61%
- 66%

STRONGLY/SOMEWHAT AGREE WITH THESE STATEMENTS
(% Healthcare Information Seekers)

I always listen to my doctor(s)
- 77%
- 71%
- 69%
- 75%
- 83%
- 94%

Health-related information on the Internet is as reliable as information from medical professionals
- 49%
- 40%
- 55%
- 51%
- 48%
- 31%

I trust my peers more than I trust medical professionals
- 26%
- 32%
- 38%
- 25%
- 14%
- 11%

Legend: ■ Total ■ Gen Z ■ Millennial ■ Gen X ■ Boomer ■ Silent/Greatest

*Small sample size of Gen Zs who get health-related information from medical doctors

HOW AMERICANS ASSESS CREDIBILITY:
FROM EMOTIONAL TO ANALYTICAL AND EVERYTHING IN BETWEEN

We asked respondents to describe, in their own words, how they determine if a source of healthcare information is trustworthy. Responses ranged from basing judgments on emotions (e.g., relying on intuition) to analysis (e.g., researching). Below is a sample of what we found.

EMOTIONAL |————————————————————————————————| **ANALYTICAL**

"I usually go with gut feelings about this kind of stuff."

"I just assume that if they are a medical professional, they know what they are talking about."

"If I find what I'm looking for."

"The long-standing history I have with these sources and the overall quality of their care and service ensures my trust in them."

"It's just a feeling. I usually use more than one source to make me feel good about the situation."

"I pretty much only trust doctors because I trust they know what they're doing."

"What kind of ads I see alongside the website."

"If multiple sites say the same thing, that's a good sign. And with social media it's more about learning about and relating to the personal experiences of other people, making those firsthand accounts."

"If they are making money from it, I would say it is not trustworthy."

"I look for information with feedback and reviews to determine the reality of the information given."

"I determine this based on what kind of ads I see alongside the website."

"If it is under .net or .gov. And if the website is at the top of the search results."

"Not everything we hear, whether it's from another person or Internet source can be accurate, although when it comes to at least three different sources, I will make a decision based on if two of the three sources are in agreement."

"I look for consumer reviews to state that the information was useful."

"Sources that use scientific-based information are more trustworthy. High reputation of the source is also a good sign; avoid personal stories, social media, etc."

"I look for references. If it's written by some random person not accredited by a health company or a doctor or something, then it is untrustworthy."

"I look to see if there has been a study done that I can look up. I also look to see if they are affiliated with a hospital, university or similar."

"I would put the information together to determine if it is trustworthy or not. You have to do some research before you make a decision."

"I look for patient reviews and do an in-depth study for what I'm searching."

"Anytime its views are skewed hard to one extreme or another [I would say] it is not trustworthy. A true medical representation would be methodical and present positions with views more diverse."

A GUIDE TO ENGAGING AMERICANS WITH CREDIBLE HEALTHCARE INFORMATION

> **"**
>
> Healthcare companies need to realize that the proliferation of misinformation and lack of trust online is actually an opportunity. As some of the most information-rich, research-driven organizations in the world, they are poised perhaps better than anyone else to provide the credible and relevant information that consumers are so actively seeking.
>
> **Stacey Bernstein, Executive Vice President & Global Director of Digital Health, Weber Shandwick**

There is a ravenous appetite for healthcare information in America today. Healthcare and pharmaceutical companies and brands should recognize that a sizeable majority of Americans are seeking health information amid a credibility gap, and this demand for credible information will only grow as Gen Zs and Millennials age.

Based on our research, Weber Shandwick recommends the following as basic guidelines for successfully interacting with customers:

Design your content for discovery. Consumers find healthcare information in a variety of places. By building content that is discoverable across multiple channels — online and offline — you can intersect your customers across their journey and ensure that they find the credible information they're looking for.

Use succinct, clear and plain language in your communications. Recognize that people are swimming in information and overwhelmed by the volume available, which creates confusion and perceptions of conflicting facts.

Customize your approaches. Although there is surprisingly little difference in the proportion of Healthcare Information Seekers across generations, Gen Zs and Millennials have different medical needs than Boomers and the Silent/Greatest generation, so content should deliver against those unique experiences. Further, Americans respect specialized expertise: Different sources are credible on different health topics/issues.

Use a smart channel strategy. Mass media has great reach for umbrella messaging, while social media is great for targeting, attention grabbing, sharing alerts and generally informing audiences.

Prove your online credibility from the outset. Trust is earned, and there's an uphill battle to convince customers that information found online, especially on social media, is credible and trustworthy. Showcase your research-driven approach, include validation from medical professionals and experts, and bring your partners into the fold. Shore up attention-getting and awareness-building communications via social media channels with supporting evidence and facts from credible sources.

Ensure your brand and content are portrayed accurately on medical information websites. This is the most common place Healthcare Information Seekers go for their information and yet they are not reporting high satisfaction with the information they are receiving. As the research indicates, credibility and trust-building need greater attention to raise satisfaction levels.

Provide physicians with support to find ways to build trust with Millennials. A perception that peers are as capable as doctors in providing healthcare information, or potentially that healthcare information can be "crowdsourced," is concerning. Physicians need to understand the root cause of this sentiment and address it before it is too late.

Use research to understand audience needs. Pre-test messages and media to optimize marketing and communications efforts and to validate clarity and credibility.

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