

A man in a grey pinstripe suit is looking at a tablet in a train station. In the background, a yellow train is visible on the tracks, and a blurred crowd of people is waiting on the platform. A large white speech bubble contains the title and subtitle text.

# Consumers and the Digital Health Information Journey

Edelman Health Sector | January 2016



# Methodology

## Objective

To understand the digital health “pathway,” and how it varies across demographic and psychographic segments.

## Timing

Survey fielded May 22 – June 12, 2015

## Audience

Online survey of **1,500 U.S. adults** who use digital health resources, across the following demographic and psychographic segments:

- Millennials, ages 18-34 (n=420)
- Sandwich Generation, ages 35-64 (n=826)
- Seniors, 65+ (n=254)
- Caregivers, responsible for the health decisions of a parent or other relative who is not a child (n=200)

# Key Insights

- 1 Caregivers are relying on digital health information more than ever
- 2 Caregivers want online health content that is detailed, factual and puts them in control.
- 3 Caregivers share – but not always publicly.
- 4 Caregivers trust owned content.
- 5 Caregivers will share sponsored content that is entertaining, but informational content will help them change behaviors.

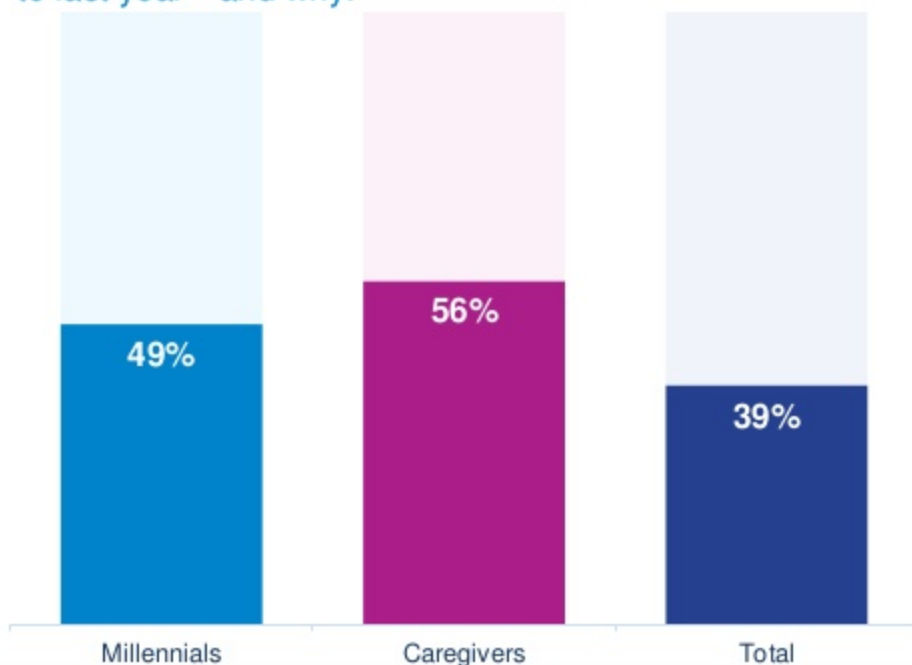
INSIGHT 1

Caregivers are relying on digital health information more than ever



# Caregivers are increasingly reliant on digital health information

Percent who are increasingly reliant on online resources compared to last year—and why:



**MORE INFORMATION AVAILABLE ONLINE  
EASIER THAN GOING TO A DOCTOR  
TRUST THE INFORMATION ONLINE  
TO GET INFORMATION QUICKLY  
AVOID EXPENSE OF DOCTOR VISIT  
ONLINE SOURCES MORE CONVENIENT  
HELPFUL INFORMATION ONLINE  
TO STAY HEALTHY**

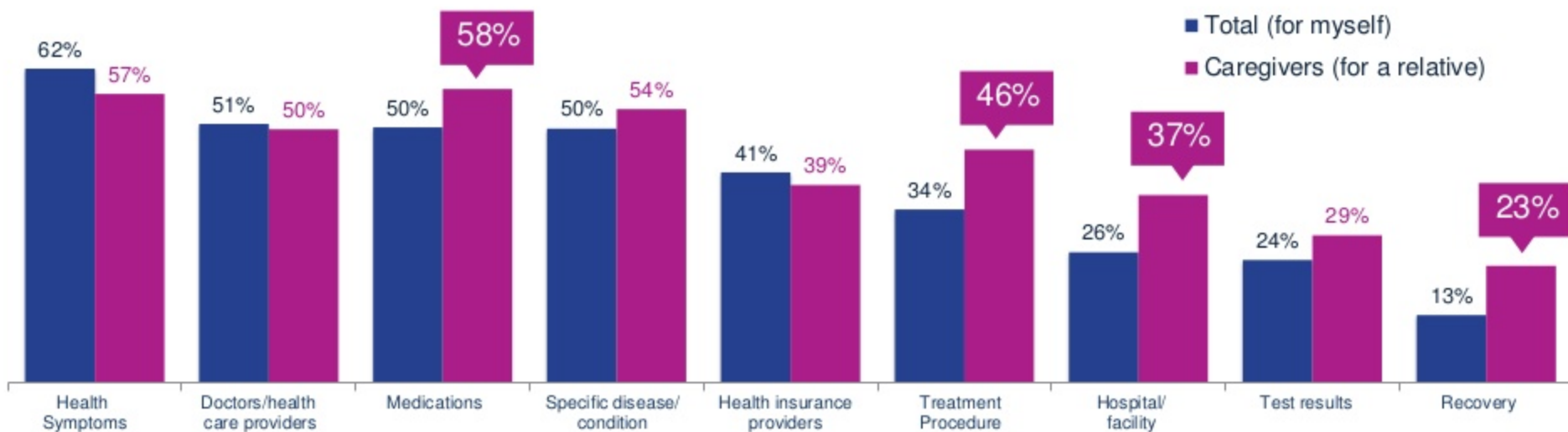
Q13: In the past year, would you say that you have become more or less reliant on online resources for information about health?

Q14: For what reasons have you become more reliant on online health resources in that past year? (Open-end, Asked if more reliant, n=578)



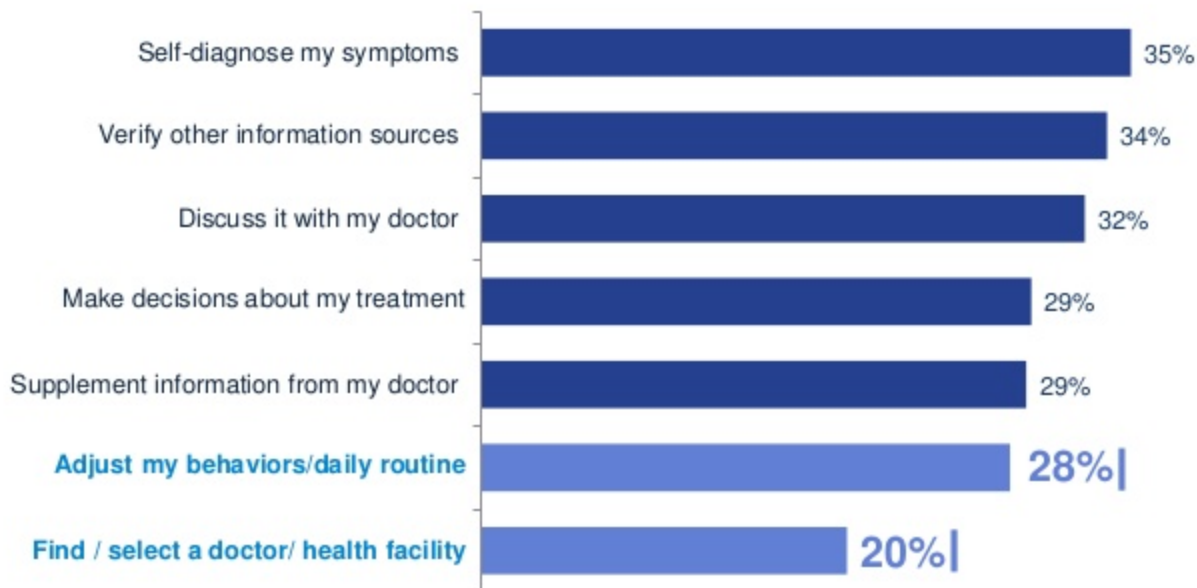
# Caregivers are looking for information about medications, treatments, hospitals and recovery on behalf of a relative

Percent who have viewed each of the following health-related information online in the past year:



# Caregivers are more likely to use digital health information to change behaviors

Of the total respondents, percent who have used digital health information to:



**Caregivers** more likely to

- Encourage someone to adjust their behaviors (36%)
- Find or select a doctor for someone I'm responsible for (27%)

INSIGHT 2

Caregivers want online health content that is detailed, factual and puts them in control.

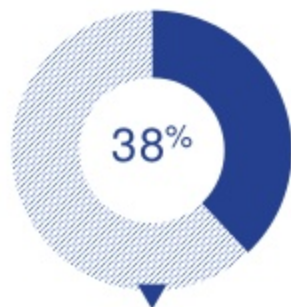




# Consumers – including Caregivers – want detail and control

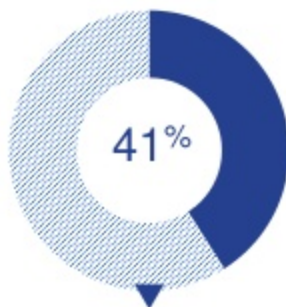
Percent who agree with each statement:

A lot of detail



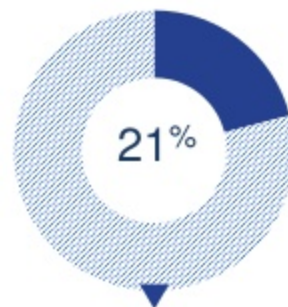
provide very detailed,  
clinical information

Give me control



provide a summary, but allow me  
to deep dive into the areas that I  
want to further explore

Give me an overview

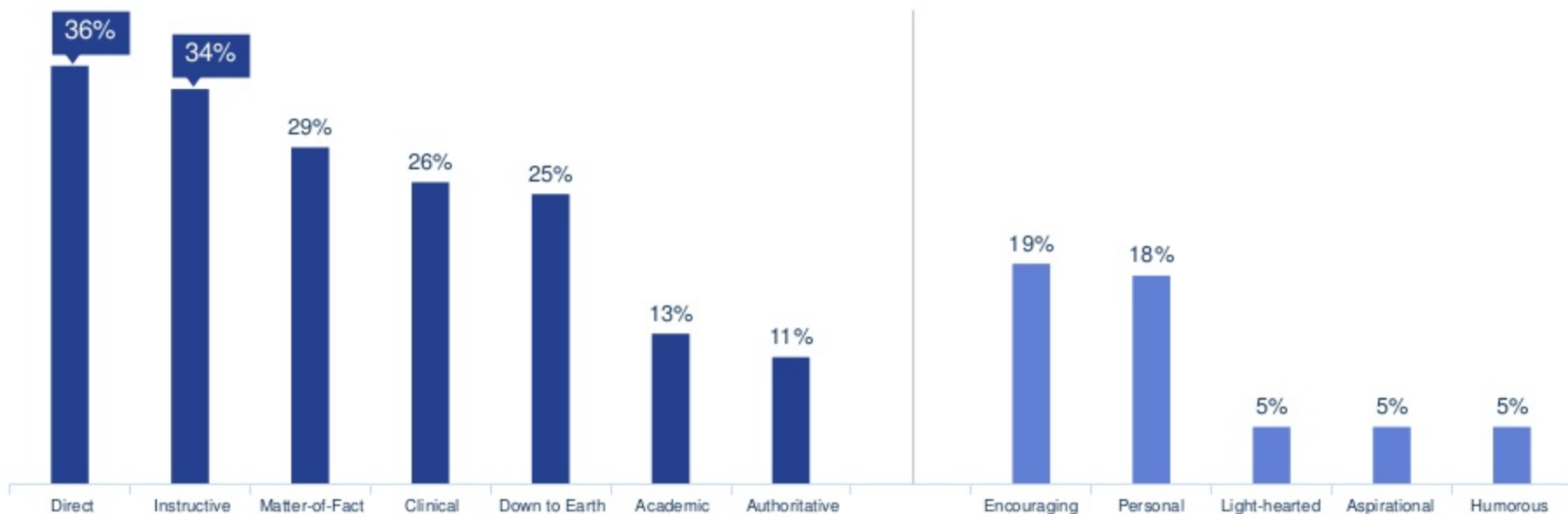


provide an overview without  
getting into the details

# Consumers – Caregivers included – want information that's direct and instructive, not personal or humorous

Percent who prefer online health information that sounds:

■ Objective   ■ Subjective/Soft



# Video content: The message is more important than the messenger

Preferences for video content, in rank order:



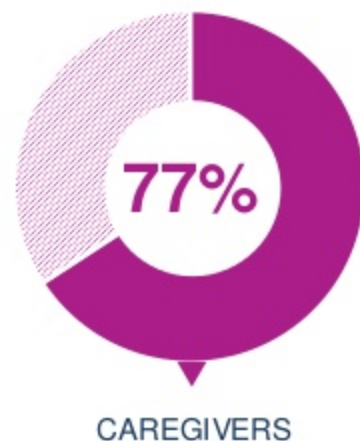
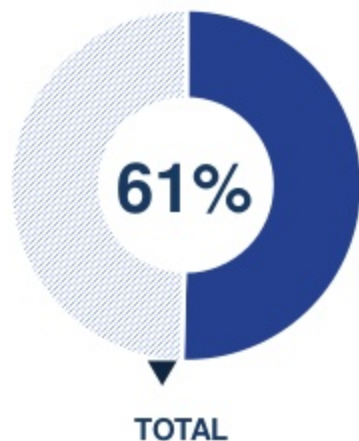
INSIGHT 3

Caregivers share —  
but not always publicly.



## Who shares: Caregivers are more likely to share....

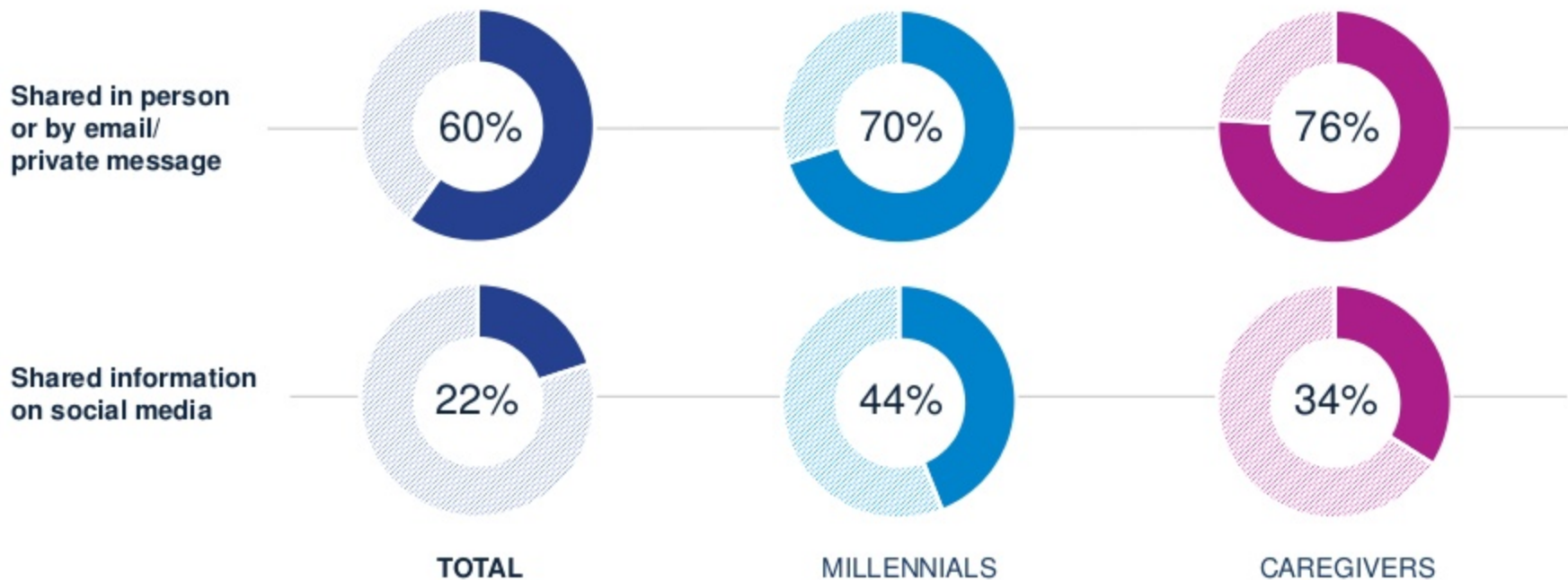
Percent who shared digital health information in the last year:





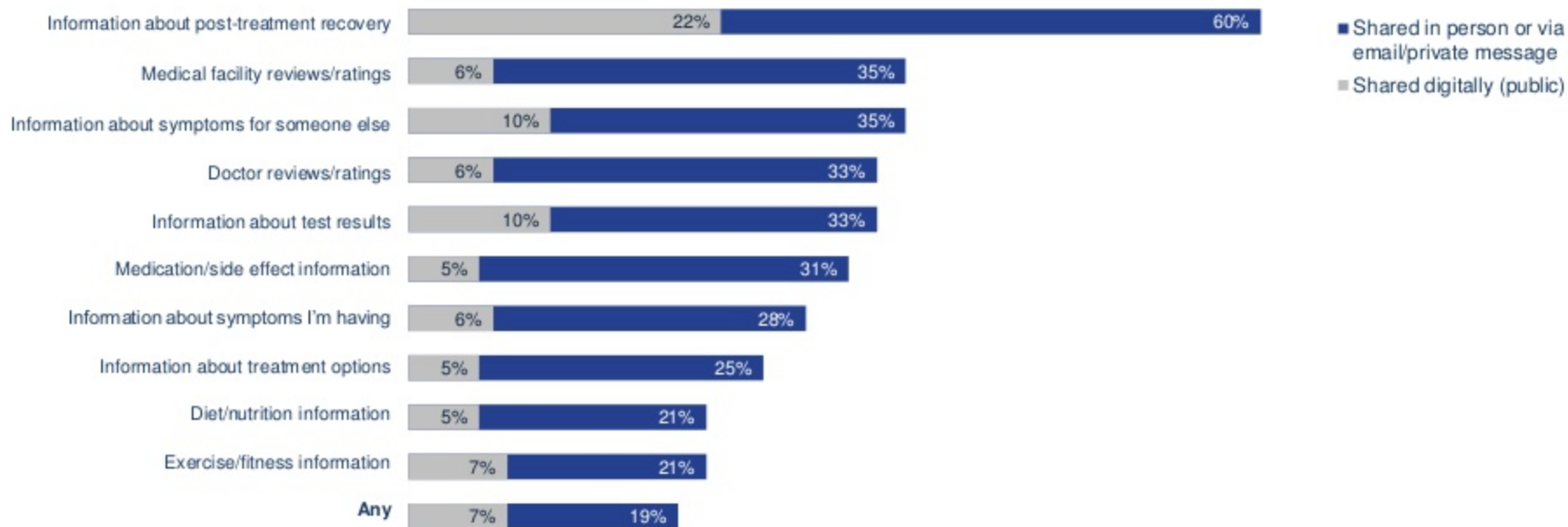
## But they are more likely to share privately

Percent who shared digital health information in the last year:



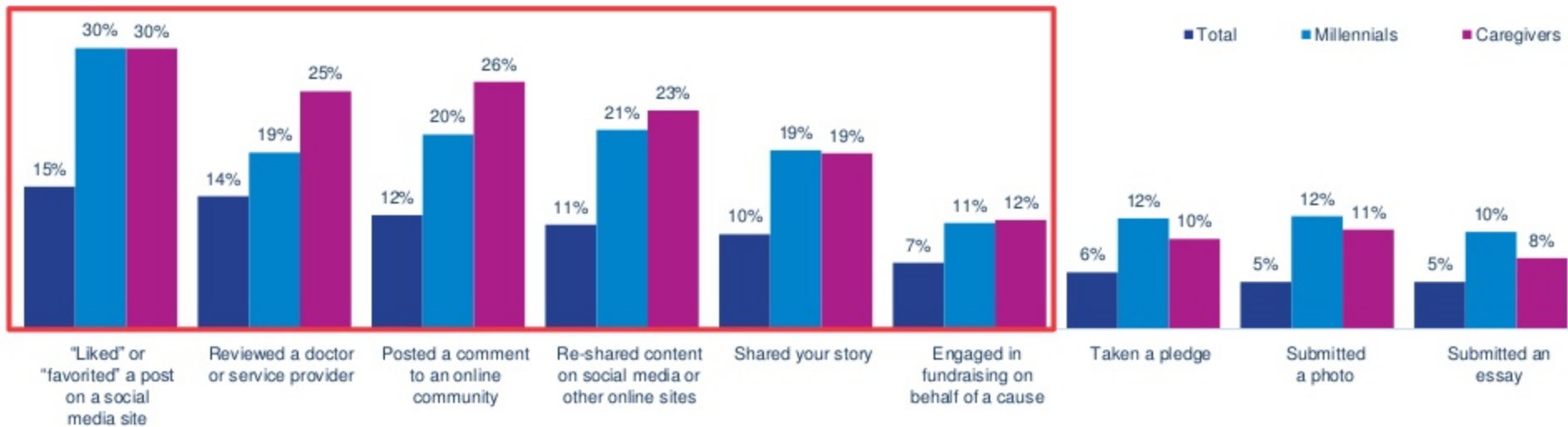
# Sharing privately is true across digital health information topics

Percent of the types of digital health information consumers share online or in person in the past year:



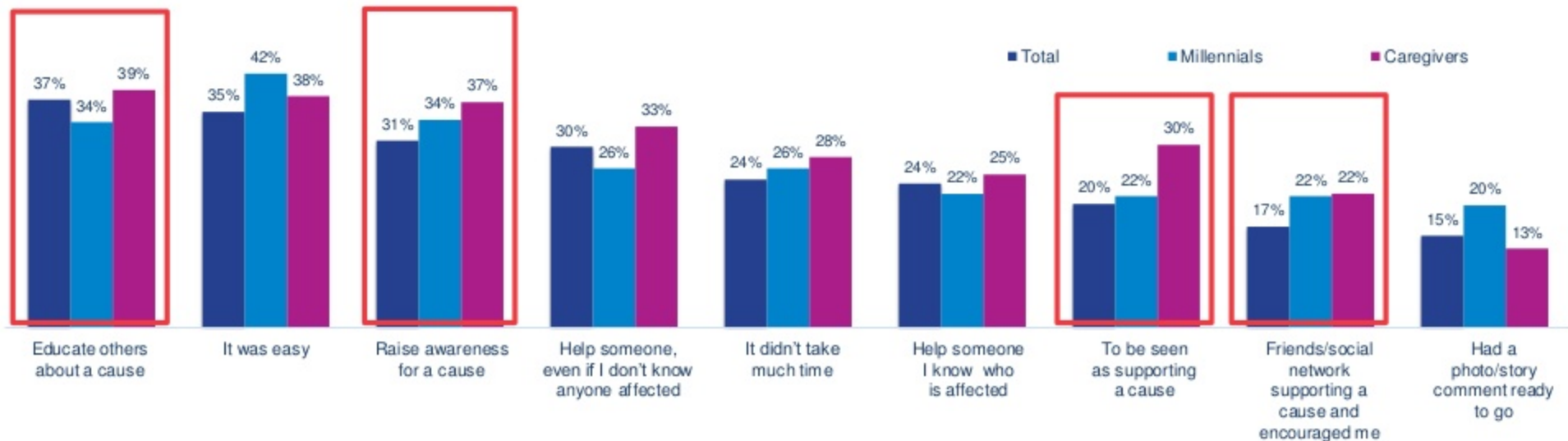
# Social sharing behaviors: Caregivers, like Millennials, are active online sharers/creators

Percent who have shared health information online in each way in the past year:



# Cause is key for Caregivers

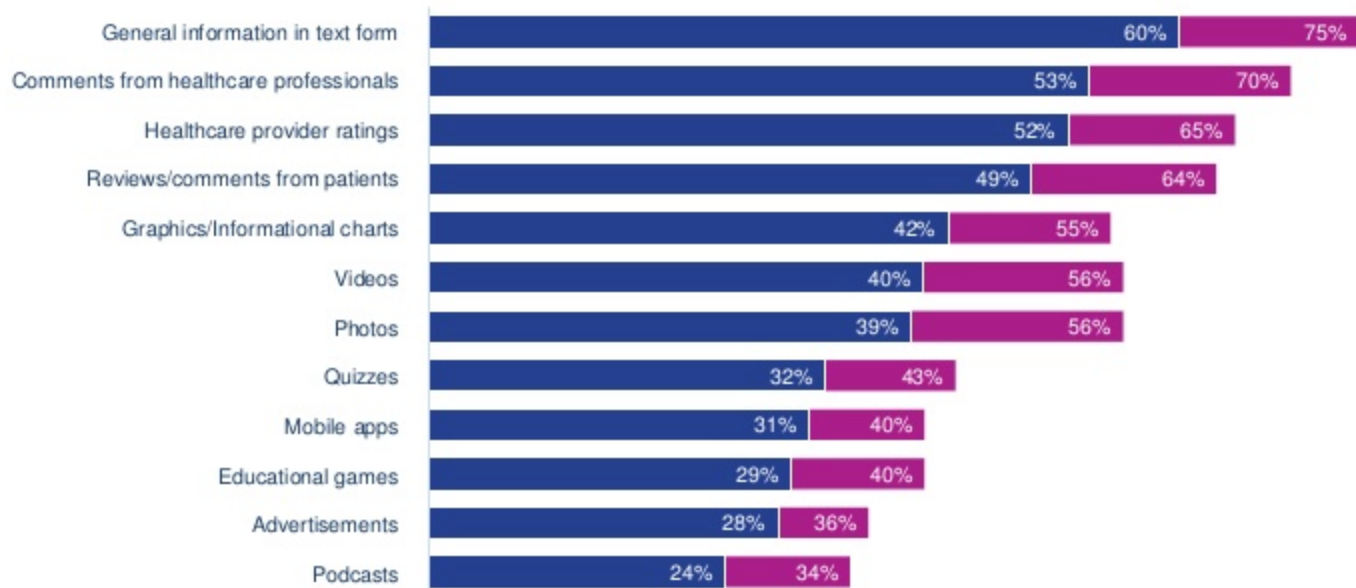
Percent why specific audiences shared health information online in the past year:



# Caregivers are especially likely to share online health content

Percent who are likely to share the following types of online health content with a friend or family member

■ Likely to Share - Total ■ Likely to Share - Caregivers





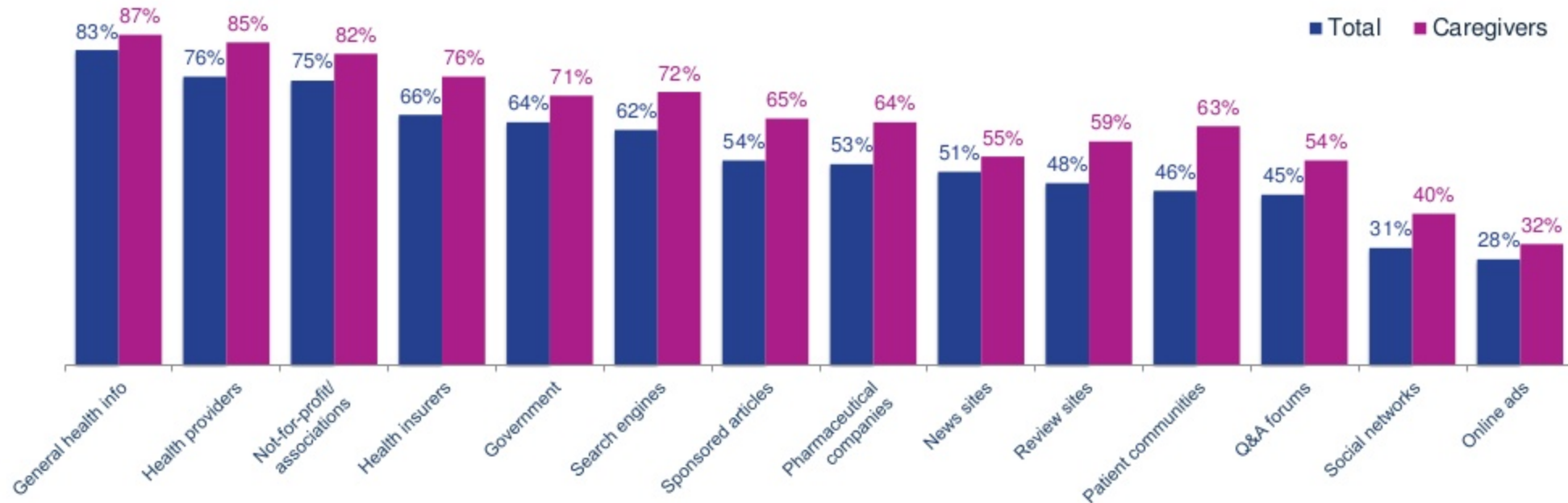
INSIGHT 4

Caregivers trust owned content.



# Caregivers have a much higher trust in online health content, including owned content

Percent who trust each type of website for health information:



Q24: Below is a list of online information sources. For each type of source, please tell us how much you trust it as a source for health information. Please use a 9-point scale where one means that you "do not trust it at all" and nine means you "trust it a great deal"