

# HealthEngagement Barometer™

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Health Influence in the  
Era of Public Engagement



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Today's challenging health environment demands *public engagement*, a deeper, more fluid connection between organizations and brands and their publics.. . . . . 3

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### Methodology

The Edelman Health Engagement Barometer is a five-country study of people's engagement in health and their expectations of engagement by organizations, companies, products and services involved in health. In September 2008, StrategyOne conducted a 20-minute online survey of the general population; the study sample included 5,183 adults, 18-75 years old. The chart below offers details on sample sizes in each country studied, margins of error and representation. Contacts for more information, including country-specific data, are listed on page 18.

	GLOBAL	US	UK	GERMANY	RUSSIA	CHINA
Sample Size	5,183	1,000	1,078	1,000	1,081	1,024
Margin of Error: Total	+/- 1.4%	+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%
Margin of Error: Health Info-entials	+/- 2.9%	+/- 6.9%	+/- 8.3%	+/- 6.5%	+/- 5.1%	+/- 6.7%
Representative on:		Gender, Age, Income, Education, Region, Ethnicity	Gender, Age, Income, Education, Region	Gender, Age, Income	Urban areas: Gender, Age, Income	Urban areas: Gender, Age, Income

Edelman Health Engagement Barometer was conducted by research firm  StrategyOne

## Foreword

**Health is under extreme pressure.** Over the past decade, aging populations, pandemics of infectious and lifestyle-related diseases, and advances in medical technology have created a massive unmet demand for health and healthcare. And now the worst economic climate in decades is exacerbating this crisis.

Concurrently, the digital revolution has exponentially increased the interactions among disparate publics. People are now empowered to freely and fluidly discuss business and societal issues that previously were not part of popular culture and conversation.

Together, these forces have created a new, complex operating climate for organizations involved in health, one that is constantly being shaped by the public's engagement in it. Because health is pivotal to personal and societal well-being, everyone is not only a health stakeholder but also has multiple stakes in health (e.g., as consumer, patient, citizen, professional, advocate, caregiver) and is a member of multiple health publics.

The new era of public engagement in health calls for organizations and brands to make deeper, more fluid, and open connections with their publics; to engage with individuals with cognizance of their multiple health stakes; and to influence personal, professional and policy decisions without seeking to control them. Health organizations and brands need to understand and address the expectations of their particular publics (as well as society as a whole), while ensuring that their

publics appreciate the benefits of their products and services, as well as the critical role that they play in advancing personal and public health. This continuous, reciprocal process of health engagement is key to building trust and has implications that extend far beyond communications to operations.

We created the Edelman Health Engagement Barometer to guide the development of effective business strategies in the rapidly evolving public engagement environment for the health sector and others with business or product stakes in health. The only study of its kind, the Health Engagement Barometer takes a global look at the fundamentals of public engagement in health, how it is evolving, and how people want companies, organizations, brands and services involved in health to engage with them.

The public has rewritten the rules of health engagement. In the pages ahead, you'll learn about the segment of the public that is most influential in health; the best ways to engage them and the general public to build trust; the power of personal, expert, and complete information on multiple channels; and the essential topics that must be addressed to open the door to engagement.

We hope that this study serves as a useful guide to operating and communicating effectively in health in the new, public engagement environment. My colleagues and I welcome your perspective; please feel free to contact us directly or share your thoughts on our Health Engagement Blog at [www.engageinhealth.com](http://www.engageinhealth.com).

NANCY TURETT  
Global President, Health  
Edelman  
January 2009

## Study Findings

### 1 People Want More Health Engagement

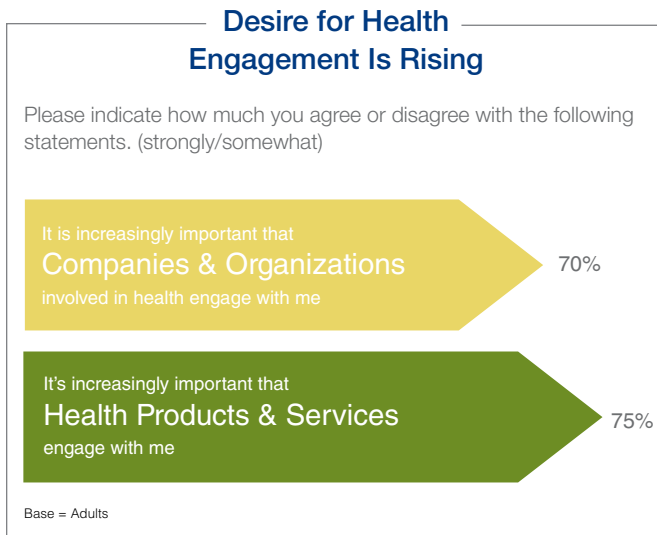
The first task of the Edelman Health Engagement Barometer was to understand to what extent people are actively engaged in health and whether they feel it is important that organizations and brands involved in health engage with them. The study asked people to rate how engaged they are with health issues, with companies and organizations involved in health, and with health products and services. (For the purposes of the study, engagement was not pre-defined.)

Globally, 63 percent of people said they are becoming more actively engaged in health issues; 60 percent are becoming more actively engaged with health products and services; and 40 percent are becoming more actively engaged with companies and organizations involved in health. Yet in all five countries surveyed, people said they want more health engagement from companies, organizations, products and services.

### People view health engagement by companies, organizations and brands as increasingly important

While 40 percent of people surveyed said they are becoming more actively engaged with companies and organizations in health, 70 percent agreed that “it is increasingly important that health companies and organizations engage with me.” Although less pronounced, a similar gap emerged when people were questioned about products and services. While 60 percent of adults across all countries surveyed said they are becoming more actively engaged with health products and services, a full 75 percent agreed that “it is increasingly important that health products and services engage with me.”

The gap between how engaged people feel they are and the engagement they crave confirms that while many companies and organizations in health have made a concerted effort to engage the public, they must do more. Companies and organizations now face a challenge – and an opportunity – to meet people’s demand for health engagement more than halfway.



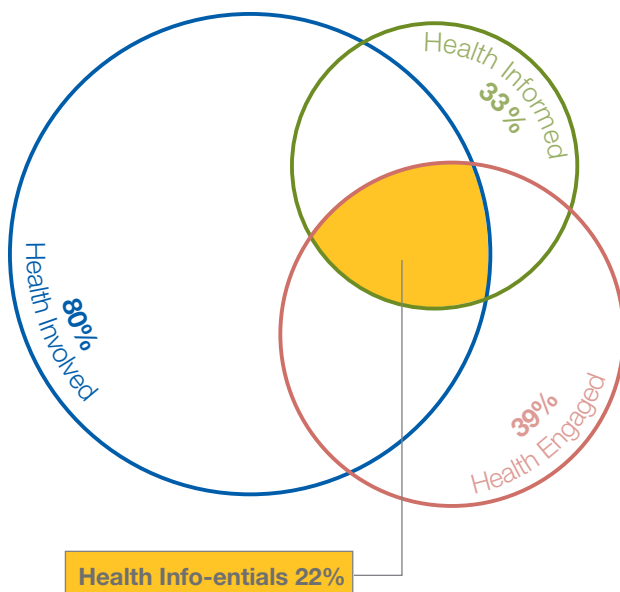
### 2 A Highly Engaged Group Wields Most Influence: the Health Info-entials™

To discover who is exerting the most influence over health, the Health Engagement Barometer asked people a series of questions about how much they are involved in health issues and how often they gather and share health information. People who said that they are highly active in three distinct categories would be considered the most influential.

First, people were asked about their level of involvement in health issues. Since health is a part of everyone’s life, it

## 1 Out of 5 People Is a Health Info-entia

- Health Involved: Involved in health but not necessarily gathering or sharing information
- Health Informed: Gather and share health information more than once a week
- Health Engaged: Self-identify as actively gathering and sharing health information, and advocating a point of view



Base = Adults

is not surprising that most people – 80 percent – claimed to be somewhat or very involved in health issues. This group is referred to as the *Health Involved*.

Next, people were asked how often they gathered information about health issues and how often they shared information about health issues that they viewed, read or heard about. This group – the *Health Informed* – is made up of people who both read or gather informa-

tion more than once a week and share the information with others more than once a week. They represent about a third of the population.

Finally, people were asked a series of questions to determine if they consider themselves *Health Engaged*. This group, comprising 39 percent of the population, actively seeks and shares information, or actively seeks and shares information and advocates a viewpoint.

### Health Info-entia amplify trends in the general population

People who are highly Health Involved, Health Informed and Health Engaged are the most influential in health. These *Health Info-entia* – one out of every five people – not only care about and take action on health issues, they also act as channels for information themselves.

Like a physician who acts as a “key opinion leader” for other doctors and influences their viewpoints, the Health Info-entia can lead others in a certain direction through his or her interest, actions and information-sharing. Health Info-entia can be viewed as signposts for where the health conversation is headed.

### Health Info-entia Are Not Defined by Demographics

#### No differences from general population:

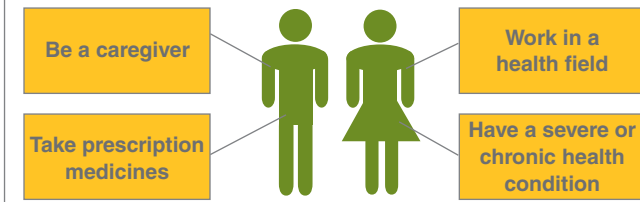
Age  
Income levels  
Marital status

#### Slight differences from general population:

Gender  
Parental status  
Employment status

## Health Info-entials: More Stakes in Health and Equally Balanced Between Men and Women

More likely to...



### Globally, Health Info-entials have more stakes in health but come from all walks of life

Beyond quantifying Health Info-entials, the Health Engagement Barometer sought to discover what the people in this group have in common and how they differ from other people.

Health Info-entials connect with health directly and personally. They are more likely to have more stakes and more experience in health compared to the general population. They also are more likely to have a severe or chronic health conditions (41 percent vs. 34 percent), work in the health field (26 percent vs. 18 percent), be a caregiver (17 percent vs. 11 percent), or take prescription medications (47 percent vs. 41 percent).

However, there are no differences between Health Info-entials and other people with regard to age, income level or marital status. Their demographic differences from the general population are minimal. Info-entials are slightly more likely to be women (50 percent vs. 46 percent), have children (41 percent vs. 35 percent) and be employed (71 percent vs. 65 percent).

Companies and organizations that want to reach the people who are the most influential in health must connect with them through their actions and their experiences, rather than targeting them demographically.

This approach demands a more in-depth, precise understanding of what matters to them and why, and of where, how, and with whom they communicate.

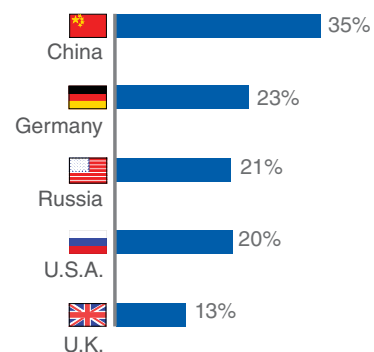
### People share information across all channels, most often with the people they know

The Health Engagement Barometer asked respondents who they are most likely to talk to about health. People, and to a greater extent Health Info-entials, are most likely to share information and opinions about health issues with friends and family members. “A person like me,” “colleagues,” and “my doctor or healthcare provider” are also critical members of their sphere of influence.

Respondents also said that they share information or their opinions with a wide range of people. To a lesser extent, the same is true for the channels through which they communicate. Conversations about healthcare are likely to be taking place on nearly every communication channel, including online message boards, personal

### MORE HEALTH INFO-ENTIALS IN CHINA

While much of the survey data are consistent across countries, this is not the case for Health Info-entials.



Base = Adults

blogs and social networking Web sites. Companies and organizations in health must take all channels into consideration – even channels that they cannot control – if they want to reach their publics.

### Engagement fuels action

Not only are people paying attention to health companies, organizations, and issues, they also frequently take action, and the more engaged they are, the more likely they are to act.

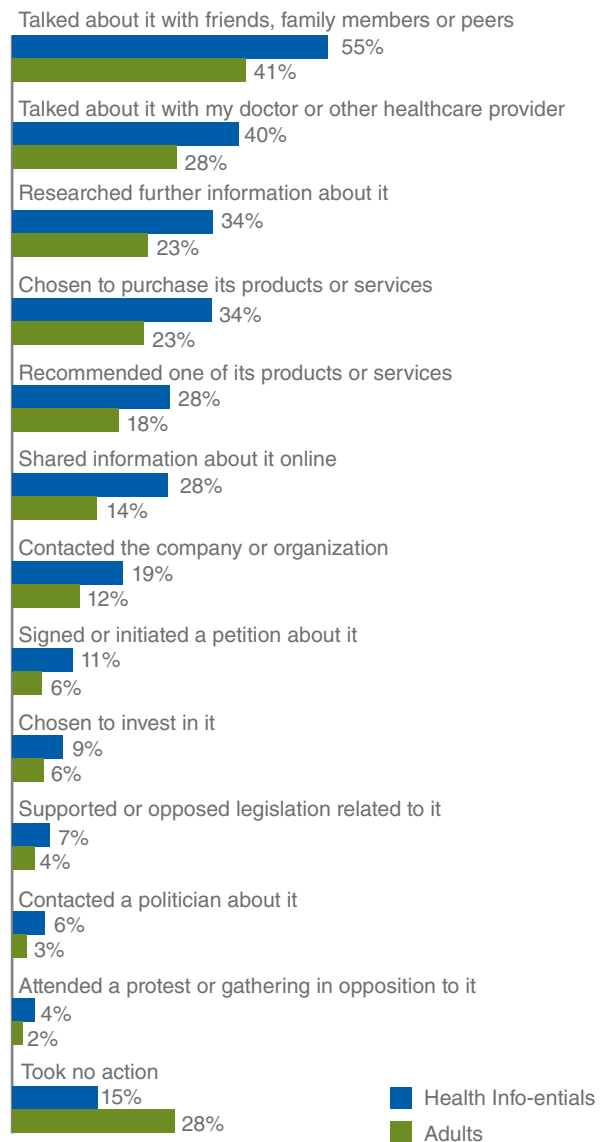
Leading the way, a full 83 percent of Health Info-entials have taken action for or against health companies and organizations, while 66 percent of the general population has taken action. These actions primarily take the form of conversations with people they know, such as friends, family, peers and providers. Actions can be positive and negative, but are more likely to be personal, not political.

Globally, people are more likely to act in response to a health issue than to a company or organization involved in health. Ninety-nine percent of Health Info-entials and 89 percent of the general population say they have taken action on health issues. Again, the most frequent action is to start a conversation about an issue with a friend or family member.

If an issue, company or organization catches the attention of the public, some kind of action will likely follow. The most influential people in health use personal conversations and talk on multiple channels. They will engage regardless of whether companies and organizations choose to participate in the conversation. Identifying and understanding these ongoing personal conversations are critical for any health entity that wants to prevail in today's environment.

## Health Info-entials: More Engaged → More Likely To Act

Thinking about companies and organizations involved in health that you are engaged with, which, if any, of the following actions have you taken in response to a company or organization?



### 3 Trust and Health Engagement Form a Virtuous Circle

#### Trust fuels health engagement – and vice versa

Trust is the most important characteristic of engagement with companies and organizations. Seventy-one percent of Health Info-entails and 67 percent of the general population rank “trust” as most important. Sixty-eight percent of Health Info-entails and 58 percent of the general population say “authenticity” is the next most important factor; and 61 percent of Health Info-entails and 53 percent of the general population feel that “satisfaction” matters most in engagement.

These three characteristics of effective engagement rose to the top among Health Info-entails in every country surveyed (although their order of importance varies by country). In the U.S. and the U.K., Health Info-entails want trust first and foremost; authenticity ranks highest among German and Chinese Health Info-entails; and satisfaction highest among Russian Health Info-entails.

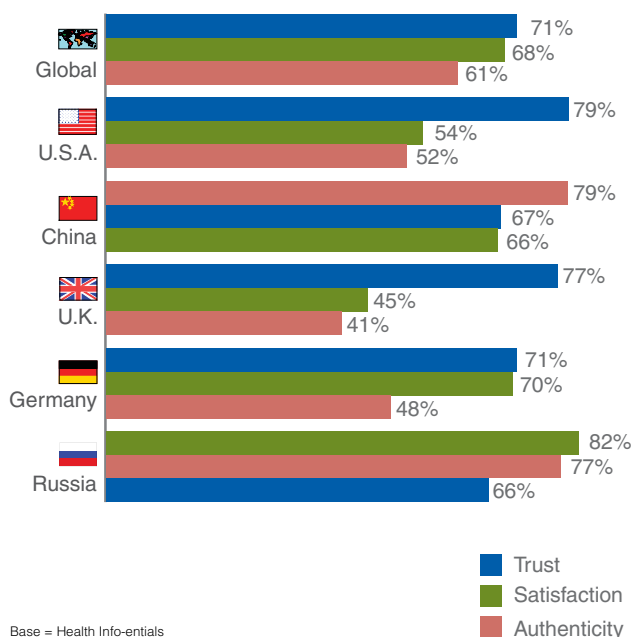
#### Health Info-entails are more engaged and more trusting

One of the most crucial conclusions of the Health Engagement Barometer is that trust and effective health engagement fuel each other. Authentic engagement builds trust and, in turn, trust builds effective engagement. The fact that Health Info-entails, the most engaged people in health, are also more trusting than the average person, confirms this idea.

Respondents were asked to rank how much they trust what they hear from companies and organizations in health and from health products and services. Sixty-nine percent of Health Info-entails trust what they hear from companies and organizations in health while 29 percent

### Trust, Authenticity and Satisfaction Are Top 3 for Health Info-entails in All 5 Countries

Thinking about the engagement you want to have with companies and organizations involved in health, which characteristics of that engagement are most important to you?



distrust what they hear. Among the general population, trust drops to 58 percent and distrust rises to 36 percent.

The same trust-distrust pattern emerges in how much people say they trust what they hear from health products and services. Seventy percent of Info-entails and 61 percent of adults trust what they hear, and 28 percent and 33 percent respectively distrust what they hear.

These patterns are consistent across all countries; survey respondents in Germany were least trusting, while those in China were most trusting.

Clearly, a large part of the population still needs to be convinced about the trustworthiness of the information

## Health Info-entials: More Engaged → More Trusting

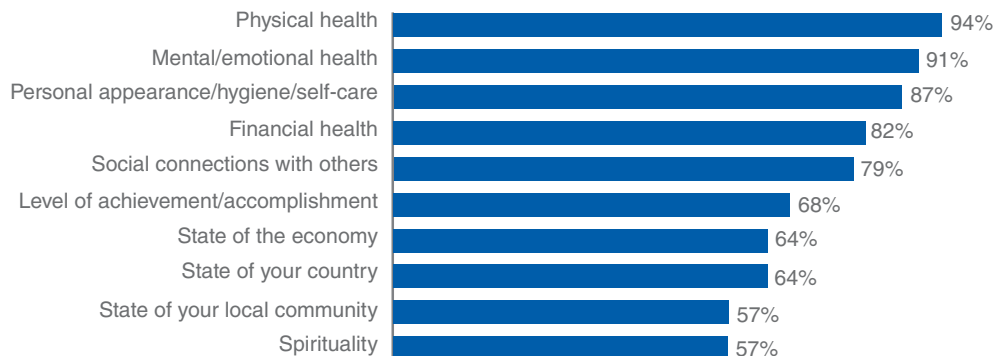
Please indicate how much you agree or disagree that you “trust what you hear from companies and organizations involved in health/...from health products and services?” (strongly/somewhat agree vs. strongly/somewhat disagree)



## Everything Matters to People's Health and Well-Being

“Health” is defined by a large set of factors

Thinking about your overall health and well-being, how important would you say each of the following factors plays in influencing it? (extremely/very important)



Base = Health Info-entials

they receive from health companies, organizations, products and services. The existence of the more engaged, more trusting Health Info-entials proves that distrust can be overcome through effective health engagement.

#### 4 Effective Engagement Is Personal and Complete

The Health Engagement Barometer sought to discover how people want companies and organizations in health to engage with them, as well as the kinds of engagement they prefer. First, to gain insight into the mindset through which they approach “health,” the study asked people to identify the most important influences on their personal health and well-being.

Across the globe, people indicated that “health and well-being” means much more than their physical health. It also encompasses personal factors like emotional health, financial health and social connections, and societal concerns like the state of the country and the economy.

#### Complete information, positive and negative, is essential

Fifty-four percent of Health Info-entials and 42 percent of adults want companies and organizations involved in health to “help me address health issues that affect me personally” and to inform them about the health conditions they care most about.

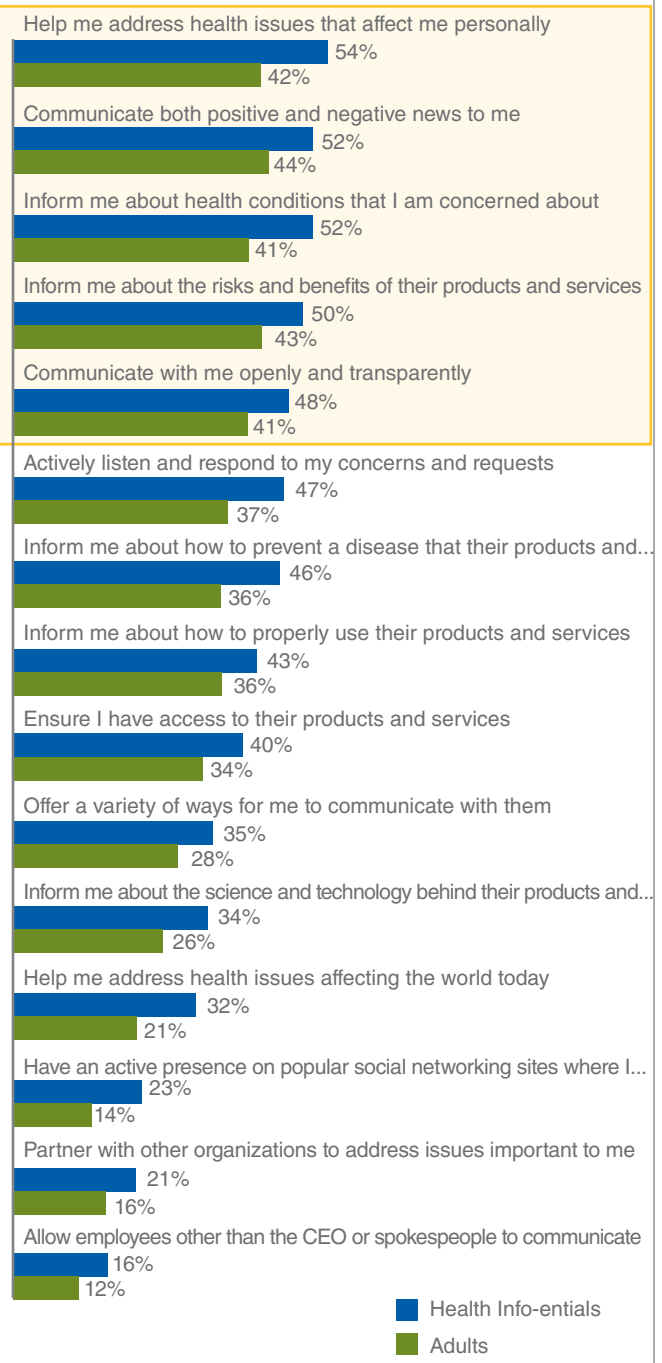
But they don’t want just basic information. They want to know the whole story – information that helps them understand both the benefits and the risks of specific products and services. They want the good news and the bad. They also want information about how to prevent disease that specific products and services treat.

Less important ways to engage include giving people information about the science and technology behind a company’s products or services or partnering with other organizations to address health issues that matter to

### If You Want to Engage People, Give Them the Whole Story

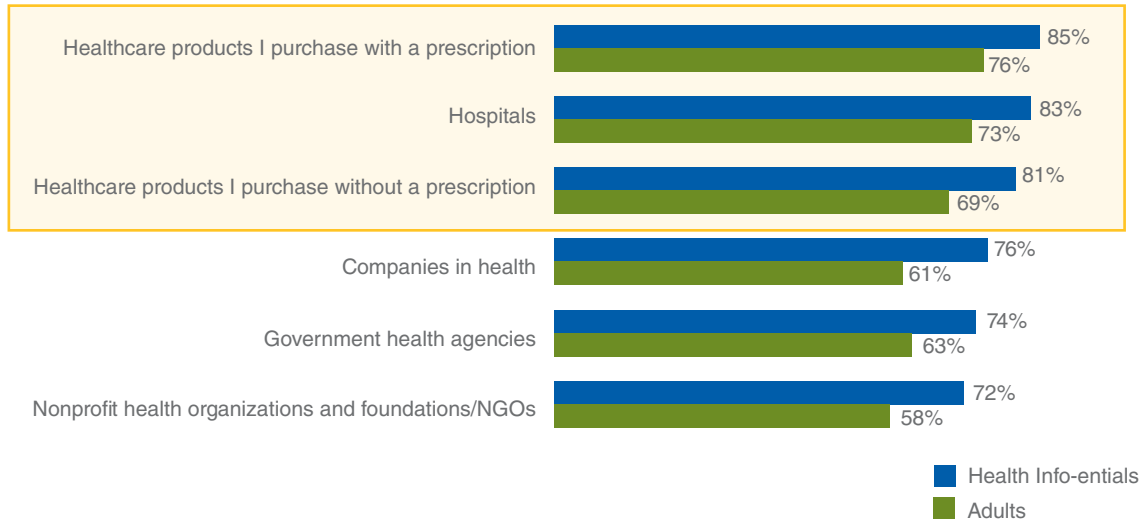
#### And start with “their” health

In which of the following ways do you want companies and organizations involved in health to engage with you?



## People Want Most Engagement From Rx, OTC Products and Hospitals

Please rate each of the following on how engaged you want them to be with you. (very/somewhat)



them. They want engagement from companies and organizations to be direct – and directly focused on them.

Overall, people are demanding transparency – a more open, interactive and personal relationship with companies and organizations involved in health. They want companies and organizations in health to actively listen and respond to their concerns and requests. They will most likely reject or dismiss an attempt to engage that is thin or one-sided, or that doesn't give them the “whole story” about the subject at hand.

### Highest desire for engagement from products and services that touch people physically

The majority of people surveyed named products and services that involve their bodies and are critical to health as their highest priority for engagement. Highest ranked were pharmaceutical products (Health Info-entials, 85 percent; adults, 76 percent); hospitals (Health Info-entials, 83 percent; adults, 73 percent); and OTC health-

care products (Health Info-entials, 81 percent; adults, 69 percent). Less important is engagement from entities that have less of a personal impact, such as companies, government agencies and nonprofit organizations.

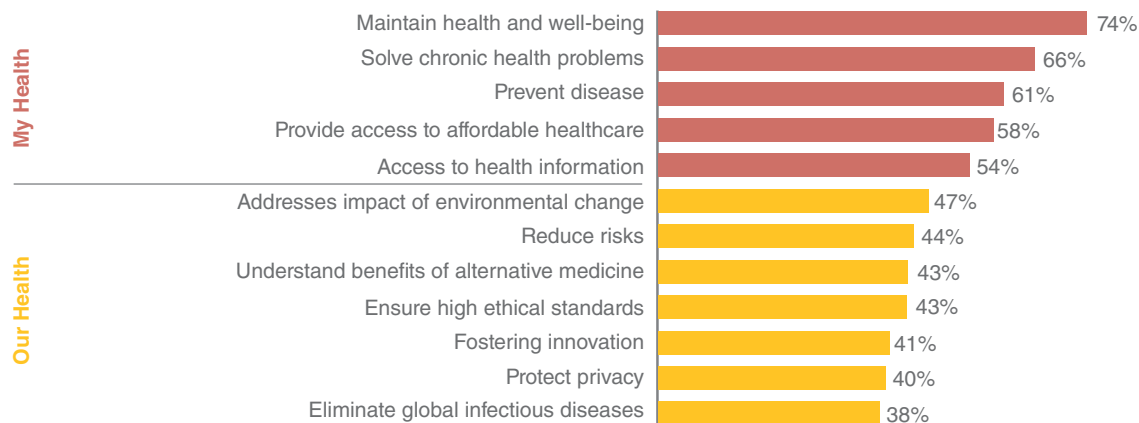
### “My health” more important than “our health”

People's engagement is highest on the issues that matter most to their personal health. Seventy-four percent of Health Info-entials are highly engaged with the issue of maintaining health and well-being; 66 percent are highly engaged with the issue of chronic health problems; 61 percent with preventing disease; 58 percent with providing access to affordable healthcare; and 54 percent with access to health information.

The power of this personal-first approach to health is universal. Every country surveyed showed this pattern of highest engagement with the most personal issues – maintaining health and well-being, solving chronic health problems, and providing access to affordable healthcare

## “My Health” Is More Important Than “Our Health”

Which, if any, of the following best describes your typical engagement with the issue of ...?  
(high engagement = actively seek out/share info or actively seek out/share info and advocate point of view)



Base = Health Info-entials

– typically topping the list. These personal health issues trump a number of societal issues that companies and organizations in health commonly hold out as important to people. Only 41 percent of Health Info-entials actively engage on the issue of fostering innovation; 44 percent engage on risk reduction; 43 percent on ensuring ethical standards; and 40 percent on protecting privacy.

### Health priorities are aligned for people, society and organizations and brands

Which personal health issues matter most to people? Which societal issues matter most? To what extent do they want companies and organizations to address them? And how much overlap is there?

To find out, the Health Engagement Barometer first asked people to rank the health issues that they believe

society needs to address today and the issues that they believe have the largest impact on their lives. They were also asked to rank health issues by how much they believe companies and organizations should get involved in each.

When asked to identify the most important public health issues, Health Info-entials chose issues that directly aligned with their personal health priorities: providing access to affordable healthcare, solving chronic health problems and preventing disease. Health Info-entials also cited these three issues as the ones they expect companies and organizations involved in health to engage in. These issues are the “price of entry” to engagement – companies and organizations must address them first before Health Info-entials will welcome their engagement on other issues.

## HEALTH PRIORITY EQUATION

Personal Health Concerns = Public Health Priorities = Expectations of Companies and Organizations

## Three Health Priorities Are Price of Entry to Engagement

# Affordable Healthcare Preventing Disease Solving Chronic Health Problems

### 5 Channels and Sources: Expertise and Personal Connection Drive Credibility

Although information is a cornerstone of today's health environment, it's not likely that every information source is considered credible. To explore this element of engagement, the Health Engagement Barometer asked respondents to rate the credibility of 20 different sources of information. By focusing on the responses of Health Info-entials, who exert the most influence on health today, we can point to where effective health information is – or should be – going.

Health Info-entials rank 10 sources most highly. Ninety-six percent of all Health Info-entials rate their doctor or healthcare professional as a highly credible source of information. But Health Info-entials do not rely solely on clinical expertise. They also regard as credible the information they get from people with non-clinical in-depth health knowledge, and from people with whom they have a personal connection. "My friends and family" are rated by 91 percent of Health Info-entials as credible, as are "a person like me" (88%) and "someone personally affected by a disease or medical condition" (88%).

### Personal and health-expert channels are rising in importance

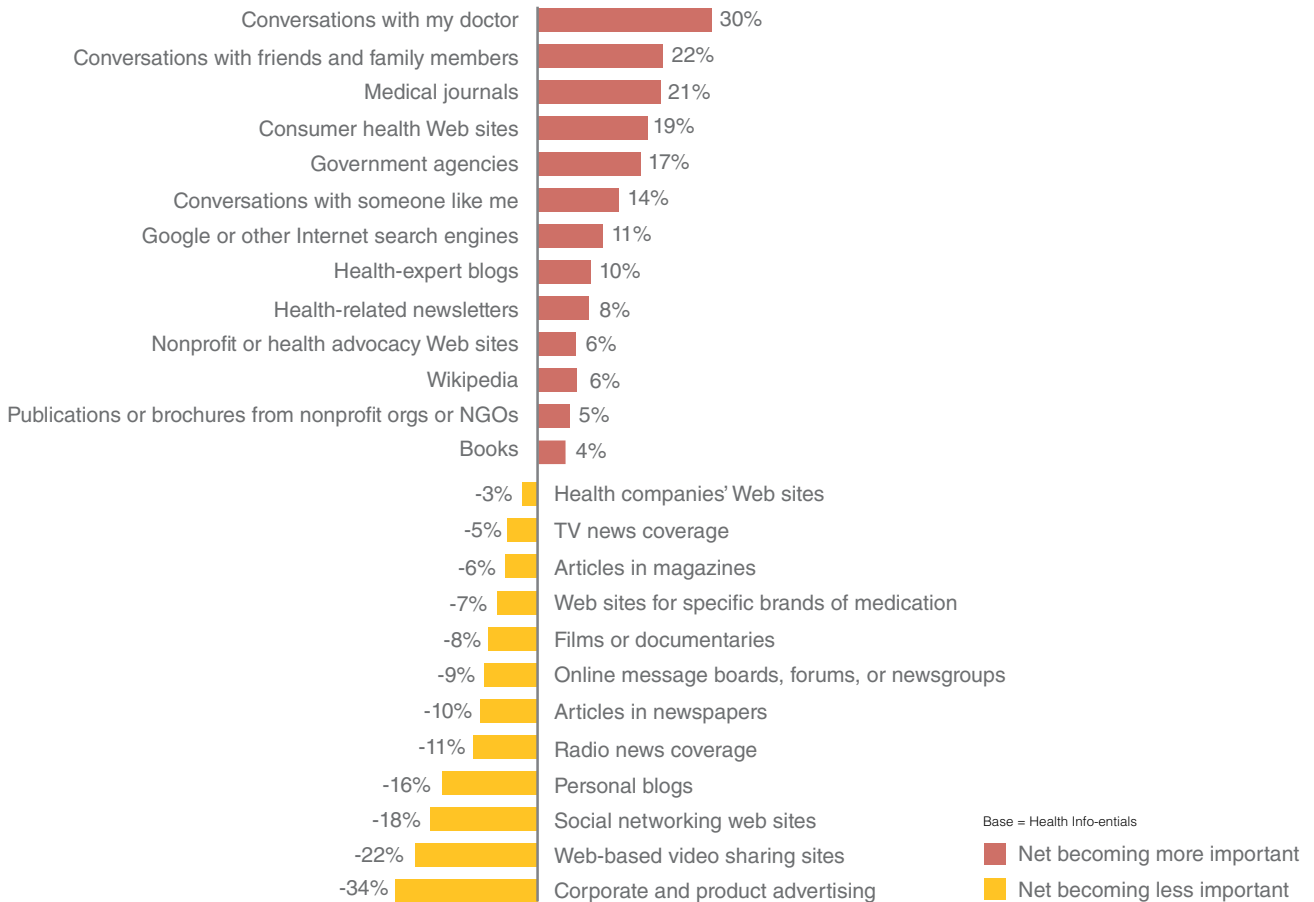
Next, the study looked at which channels are becoming more – and less – important to Health Info-entials. Overall, people's preferences reveal that content that offers personal connection and health expertise matters more than the channel through which it is delivered.

For example, the net emerging importance (difference between increasing and decreasing importance) of "conversations with my doctor" is 30 percent, "conversations with friends and family members" is 22 percent and "health expert blogs" is 10 percent. A wide range of other sources are considered increasingly important, including medical journals, government agencies, consumer and health advocacy Web sites, and "conversations with someone like me." These channels deliver content that is either personal in nature, offers health expertise, or both.

The net emerging importance of corporate and product advertising is negative (-34 percent), as it is for a variety of social media applications, including Web-based video sharing sites (-22 percent), social networking Web sites (-18 percent) and personal blogs (-16 percent). Health company Web sites also have a negative net emerging importance (-3 percent). These findings indicate that information sources that are non-expert or less personal in nature are becoming less important.

## Personal and Health Expert Channels Are Becoming More Important

For each of the following sources of health information, please indicate whether that source is becoming more important to you, less important to you, or remaining the same. (Net = becoming more important – becoming less important)



### The New Second Opinion™

As much as Health Info-entials trust information from experts like their doctors, they still turn to other sources for validation. Eighty-eight percent of respondents noted that they turn to their physicians to validate online information, and the same number turn to other sources to validate information from their doctor.

No single source of information stands out or stands alone. This finding signals that to ensure that their information is relevant and effective, companies and

### THE NEW SECOND OPINION™

88%

"I usually turn to my physician to validate info I get online."



88%

"I usually turn to other sources to validate info I get from my doctor."

organizations involved in health must engage across a wide range of channels.

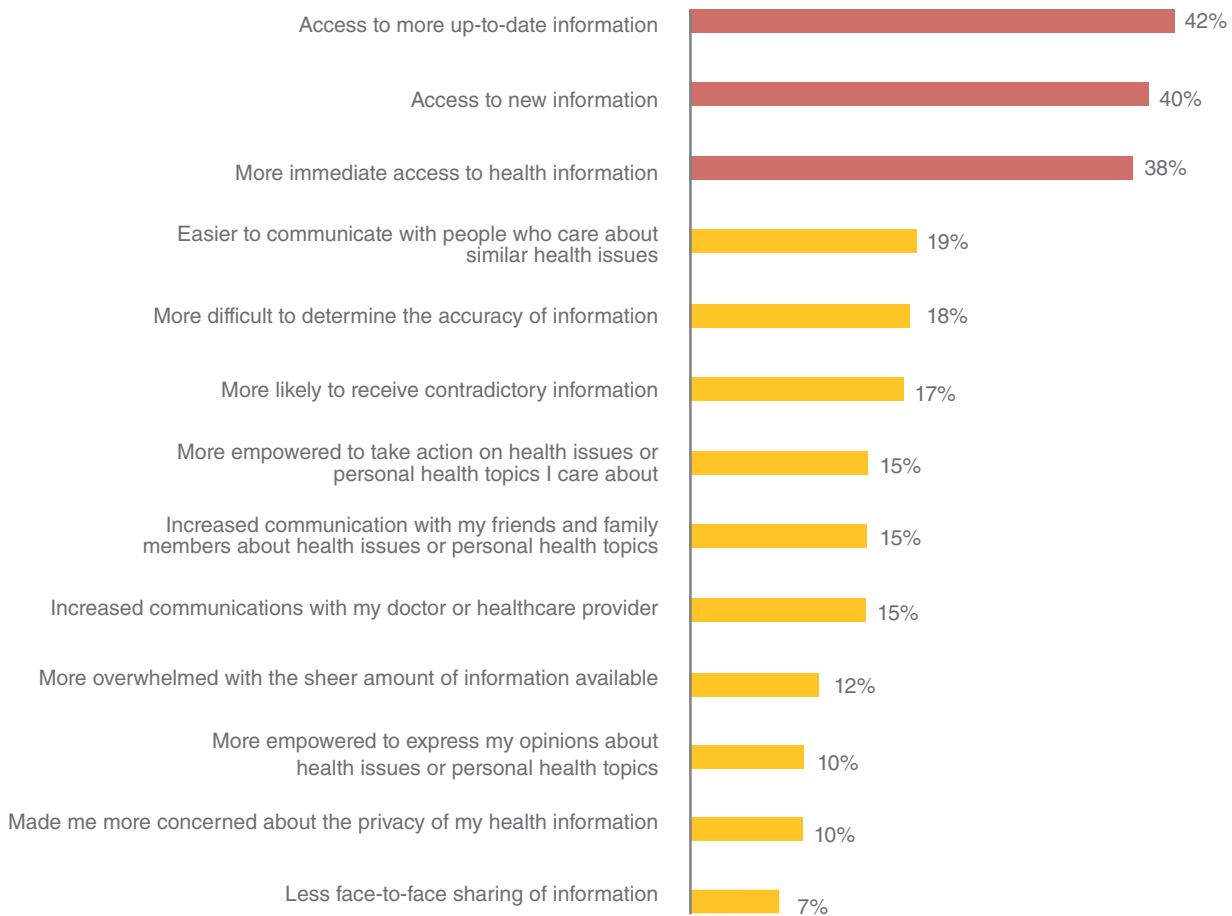
**Digital: changing the dynamics of health**

Digital technology has fundamentally changed health by changing how people receive and share health information. Forty-two percent of Health Info-entials say the most important impact of this change is that it provides more immediate access to information.

Health Info-entials also cited a few negative implications of digital technology, such as having more difficulty determining the accuracy of information or being overwhelmed by the sheer amount of information, further confirming the high value that Health Info-entials place on expert health information. Interestingly, very few Health Info-entials (7 percent) felt that technology resulted in less face-to-face sharing of information.

**THE REAL-TIME REQUIREMENT: DIGITAL INFORMATION ON DEMAND**

Which, if any, are the THREE most important ways that digital communications (e.g. e-mail, the Internet, mobile phones) has changed how you receive or share information about health issues?



Base = Adults

# The New Rules of Health Engagement

Public engagement has changed the way health influence happens. To engage effectively, particularly with the Health Info-entials, follow the new rules of health engagement:

**1 Provide deep content.** People want to know the whole story—complete information that helps them understand the benefits and the risks of products, services and issues. Filtering information can be perceived as paternalistic.

**2 Be transparent.** People will dismiss or reject an attempt at health engagement that seems one-sided, vague or evasive. They want organizations and brands in health to proactively convey important information and respond authentically to their concerns.

**3 Inform in real time.** Organizations and brands involved in health need to become more nimble in disseminating information. In the digital era, people expect organizations to provide information rapidly, and they view any delay with skepticism.

**4 Join the conversations, online and off.** Information about your organization or brand is now freely gathered, shared and validated across multiple channels, both online and offline, and inside and outside the specific topic area. Participate actively in conversations across multiple channels so that you don't cede to others how you and your business are defined.

**5 Engage in prevention, chronic health problems and access to health care.** These are priorities for personal and public health, and they are the “price of entry” to engagement—they are the top issues that people expect organizations and brands to address before engaging on other issues. Your engagement on these priority issues should be aligned with your business and content expertise.

**6 Take a holistic approach to health and well-being.** Health and well-being encompass physical, mental, emotional and even financial health; personal appearance; and social connectivity. Remember that people who have a disease or health condition can still feel a sense of health and well-being.

**7 Address people's multiple stakes in health, including their personal ones.** All of your publics are part of “the public,” so don't view any of them through only one dimension of their engagement in health—for example, as “patient,” “regulator,” “payor,” “physician,” or “investor.” Factor in all of a person's personal and professional stakes in health when engaging with him or her.

**8 Be personal.** People want to be engaged on the topics that matter most to them personally and through sources and channels that enable interactions with individuals, not faceless entities.

**9 Engage through health-expert channels and sources.** Connect with people through channels and sources that are seen as health-expert. Health expertise can mean deep personal experience as well as medical or scientific degrees and credentials.

**10 Consider the risks of not engaging.** Recognize the risks of not engaging, including having your message defined by others, squandering an opportunity to build trust (or worse yet, losing trust), or failing to motivate your publics to take positive actions on your behalf.

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