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## Reprint

### Consumer Use of the Internet for Health: Whose Numbers Do You Believe?

by John Mack, VirSci Corporation.

On March 16, 2003, the Center for Studying Health System Change (HSC) released a study that disputed widely-held beliefs—based on other studies—that most Americans rely on the Internet for health information. According to the study<sup>1</sup>, nearly two-thirds (62%) of American adults, or about 117 million people, failed to seek any health information from a source other than their doctor in the previous year and only one in six consumers turned to the Internet for health information (16%, or 30 million adults).

Other studies, including Cybercizen Health (Manhattan Research) and The Harris Poll (Harris Interactive), report much higher numbers ranging from 63 million adults to 110 million adults (see table). Mark Bard, president of Manhattan Research, wryly notes, “As in many situations, the truth may lie in between.” Coincidentally, that’s exactly where results from his research lie (63 million adults)!

#### So, whose numbers do you believe?

Which study should you quote when making a case to pharmaceutical product managers to integrate the Internet into their marketing strategy (see article in this issue, “Integrating Online & Offline Marketing: Challenges for Pharma,” Pg. 2)?

Parameter	HSC	Manhattan Research	Harris
U.S. “eHealth” adults (millions) <sup>a</sup>	30	63 <sup>b</sup>	110
Percent of adult population	16%	31%	53%
Year of study	2001	2002	2002

<sup>a</sup> eHealth adults defined as: “seek information about a personal health concern” (HSC); “utilizing online health information and services” (Manhattan Research); “sometimes use the Internet to look for health care information” (Harris)

<sup>b</sup> Calculated from data presented at the Internet Healthcare Coalition Teleseminar: What Drives Health Consumer Trust and Credibility on the Web? (Oct. 30, 2002).

#### It’s the Methodology Stupid!

Bard has been tracking the online health space since 1994, so naturally he was interested in the HSC study. His response was to look at the last 8 years of trended data, review the methodology, and offer us his opinions.

First of all, the headline announcing the study—“Study Disputes Notion that Most Americans Rely on Internet for Health Information”—is right. “The majority of adult US consumers do not find health information online,” says Bard. This is supported by the latest data from Cybercizen Health (released Q4 2002), which shows 31% of all U.S. adults (online and offline) utilizing online health information and services (see table). Only Harris claims a slim majority of adults “sometimes use the Internet to look for health care information.”

*Continued on next page...*



Mark Bard

How do the studies define "health information seekers?" The HSC study chose to include consumers in this category if they reported "seek[ing] information about a personal health concern" in the last 12 months. "Arguably," opines Bard, "this wording would decrease the total count because you eliminate people searching for information for others as well as those who may search for information but don't consider it a *personal* health concern. Just ask them if they seek health information in any capacity and then drill down deeper from there," suggests Bard.

What is the N or sample size of this research? "Although this is typically the first fact presented with market/marketing research," Bard states, "I'm not exactly sure what the answer is in this case." In the words of the HSC, "The survey contains information on about 60,000 people." "My guess," says Bard, "is that the sample was a few thousand and the results were projected to reflect total 'household' impact. Although sample description tends to get swept under the rug, or reported incorrectly by the media, it's the foundation of the research along with the sampling frame—i.e., did you get a representative sample of the intended target audience?"

#### How does this contradict—or support—existing research?

As shown in the table on page 4, Manhattan Research data, based on 3,028 in-depth telephone interviews of online and offline adults, show consumers are about twice as likely to be e-health consumers as compared to the HSC study (31% vs. 16%, respectively). Keep in mind that the HSC data are from 2000-2001 and Manhattan Research data are from 2002.

The Harris Poll, which surveyed only Internet users, estimates that 53 percent of all adults sometimes use the Internet to look for health information. This survey used a very small sample size of 707 *online* respondents. "Data from panel research does tend to overstate—perhaps by a factor of 1.5 to 3 times—the likelihood of online actions as panel respondents tend to be savvier than the typical online consumer," says Bard.

The debate over whose numbers of online health information seekers are "right" or "best" is often an intellectual exercise, more than a practical one. No two studies define health information seekers and their online quest quite the same way. Unfortunately, people will pick and choose the numbers that best support their own agenda. Knowing the specifics of each study may afford you a practical tactical advantage when debating the issue.

#### Painting a Picture for Pharma Marketers

So, how is this all relevant to the pharmaceutical marketer? As the "father" of online consumer health information seeking behavior market research and analysis, Michael S. Brown<sup>1</sup>, President and Principal Consultant at MSB Associates, focuses on specific demographics, needs, attitudes and behaviors of the "HealthMed Retrievers" rather than the broader numbers. "The insight that pharma marketers need is tightly focused on items that are not printed in public documents," offers Brown, "but are available or sold to study sponsors and to others in special sorts or cross-tabulations that also take into account age, educational levels, household income, literacy levels, race and cultural background, gender, health status and/or co-morbidities, etc."

"Despite the numbers showing it's a minority from a pure population point of view," cautions Bard, "the real analysis for many pharma marketers is relative value—payer mix, Rx requests, offline value. When you start to compare the e-health segment to non-users, the data paint a fascinating picture for pharma marketers to mull over." Ah, but to get that picture, you'll have to dig deeper into the data and pay a fee.

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