

Helping Health and Wellness Practitioners Understanding and Leverage the Importance of a Web Presence



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Executive Summary

Research, interviews, and document analysis were conducted to determine the viability of health and wellness businesses moving their message to the Internet (i.e., a web presence). General research in health trends revealed the tremendous costs and amount of spending on health care in the United States, as well as the somewhat negative impact on consumers.

Increased use of the Internet to find health information is prevalent, especially among females. Wellness products, services, and information are highly sought after by consumers and are among the highest growing segments in the health and wellness industry. Legal issues and questions of credibility about online information preoccupy businesses in the health and wellness industry. Research shows that universities are the number one choice for health information among both health professionals and non-professionals seeking information online, pointing to a positive affiliation for SPH and its customers with the National University System.

Health and wellness practitioners will face strong competition in the areas of providing online medical content and services. Getting online now and building a reputable presence will be key for stability and long-term viability.

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Introduction

This study highlights macro trends in health and wellness as they relate to businesses, health care professionals, and consumers in order to prepare practitioners strategy of developing a web presence to serve the growing Internet marketplace. The United States spends more than \$2 trillion dollars per year on health care, almost twice what other industrialized countries spend. That amount is increasing by almost 10% per year (National Coalition on Health Care, 2007). Opportunities abound for businesses in the health care industry with the “graying” of America, yet the overall dissatisfaction of Americans with their health care coverage, access, and efficiency signal necessary changes in policy, coverage, and consumer behavior. This report help practitioners and businesses understand why building an online presence now is so important in the health and wellness electronic information age.

Trends in Health and Wellness

With rising health care costs and complaints of low-quality service, consumers have grown to mistrust the health system care in the U.S. Therefore, it is no surprise that national surveys indicate the largest emerging health and wellness trend is consumer ‘control.’ This is reflected not only in how consumers choose and finance their health care services, or where they receive treatment (ex. medical tourism, the act of traveling overseas for surgery and other health care needs), but in how they gather information on diseases and symptoms.

It is also evident consumers are interested in ‘wellness’ products, services, and information, including alternative and holistic medicine. The wellness industry showed 15% growth from 2005-2006 to reach sales of \$91 billion. The largest growth within this category was in the area of “natural/organic personal care” which grew by 24% from 2005-2006. It is estimated that sales will double in some areas of wellness by 2011(National Marketing Institute, 2007).

The largest number of Americans since 1992 (47 million) remain uninsured or under-insured. Data from the 2006 U.S. Census Bureau show the largest increase of uninsured Americans was in the middle-class. The majority of this middle-class uninsured group earns more than \$75,000 per year. As a result, trend watchers see the growth of retail based clinics, or “minute clinics,” owned by corporations such as CVS and Walgreen’s and managed by registered nurses, as an indication of an alternative to traditional insurance coverage.

U.S. residents are increasingly turning to the web to seek health care information, up from 63.7 % in 2005 to 81% in 2006 (Doty, 2007). It is estimated that there are 8 million users per day looking for health related information.

Internet Access

As noted, U.S. residents are using the Internet more and more to obtain health information, perhaps as a proxy for 'access.' Trends discussed below include population demographics seeking health information, type of information being sought, increase in health and wellness social networking groups, and implications of these trends.

Who is seeking health information online?

According to a Burst Media study in 2007, those between the ages of 18 to 34 are the most frequent consumers of health information online. Within this group, women between the ages of 25 to 34 are the most frequent users.

Also, a 2007 study in the *Journal of Health Care for the Poor and Underserved* showed a

Health Information Sought on Internet 2007

54% on specific illness symptoms

51% treatment for specific illness

38.6% drugs or remedies

37.6% nutrition related

32% diet or weight loss

30% alternative medicine info

29.8% vitamins/supplements

26% OTC remedies

24.5% health and beauty aids

narrowing technology gap for poor and older populations. The study also showed that rural Americans frequently use the Internet to find health information.

What type of health care information is being sought?

Information about symptoms and treatments is the most sought after, followed by drugs, diet and nutrition information.

Patients are also discussing the information they find on the Internet with their physicians and 78% of respondents in one study said they thought that discussing these findings improves doctor-patient communication (2005 HON Survey of Health and Medical Internet Users).

Interestingly, most searches for health information are conducted via search engines (not via their physician's websites or large medical sites like *WebMD.com*), leading companies like Google (Google Health) and Microsoft (Health Vault) to develop health specific products for consumers.

Increase in Health and Wellness Social Networking Groups

































Health information is so prevalent on the web, it follows that users are interested next in finding and establishing communities of support. There are thousands of examples of web sites trying to meet that need. One site, *dailystrength.com*, conceived by teams from Yahoo! and Facebook, boasts over 500 anonymous health communities offering online support. Other sites started as social networking sites now deliver content. *For example, at RealMentalHealth.com, users can find information on treatments, health news, audio or video clips from other members, and interviews with health professionals.*

Implications

Since credibility is so important to both health professionals and non-professionals, it is no surprise that the number one preference in one study for health information in both the U.S. and Europe was academic/university sites. This finding bodes well for businesses looking to partner with SPH as it has an affiliation with an academic partner, an increasingly wide-reaching educational system offering opportunities to high school through advanced graduate degree programs.

Patients and Professionals Preferred Web Sites, in (— USA — Europe)

Please rate your preference to obtain health information from the following web sites:

	Patients (n=436)		Professionals (n=507)	
University sites	83.81 %		88.74 %	
	91.67 %		95.07 %	
Consumer sites sponsored by medical journals, or publications	88.96 %		89.55 %	
	90.75 %		87.44 %	
Governmental agencies sites	82.91 %		88.03 %	
	87.30 %		87.39 %	
Consumer sites sponsored by non-commercial medical organizations	77.68 %		76.06 %	
	83.76 %		77.02 %	
Consumer sites sponsored by hospitals	75.00 %		78.24 %	
	73.73 %		74.78 %	
Pharmaceutical manufacturer sites	60.13 %		56.30 %	
	54.23 %		75.00 %	
Consumer sites sponsored by commercial medical organizations	61.71 %		58.26 %	
	50.01 %		52.26 %	
Consumer sites sponsored by the news media	50.48 %		52.65 %	
	58.82 %		52.94 %	

Ninth HON Survey, Health On the Net Foundation, Winter 2004-2005.

Opportunities in the Marketplace

National

The U.S. spends more than \$2 trillion per year on health care and that figure is increasing by almost 10% a year. **Pharmaceutical and managed health care companies rank at the top of the Fortune 500 list in earnings.** These top health care companies spend tens of millions of dollars per year on advertising.

Top Health Care Companies in Fortune 500 List

Name	Revenues	Segment in Industry	Location	Website
McKesson	\$80 billion	Pharmaceuticals, Medical Supplies, etc.	San Francisco, Ca	http://www.mckesson.com
Cardinal Health	\$75 billion	Pharmaceutical Distribution; Franchise of Retail Pharmacies	Dublin, Ohio	http://www.cardinal.com
Amerisource Bergen	\$54.5 billion	Pharmaceuticals	Chesterbrook, PA	http://www.amerisourcebergen.com
United Health Group	\$45.4 billion	Managed Care	Minnetonka, MN	http://www.unitedhealthgr
Wellpoint	\$45 billion	Managed Care	Indianapolis, IN	http://www.wellpoint.com
Medco Health Solutions	\$37.8 billion	Pharma Benefits Manager	Franklin Lakes, NJ	http://www.medco.com
Caremark Rx	\$33 billion	Pharmacies	Nashville, TN	http://www.caremarkrx.co
HCA	\$24.5 billion	Hospitals and Surgery Centers	Nashville, TN	http://www.hcahealth
Aetna	\$22.8 billion	Managed Care	Hartford, CT	http://www.aetna.com
Merck	\$22 billion	Pharmaceuticals	Whitehouse Station, NJ	http://www.merck.com
Cigna	\$16.7 billion	Managed Care	Philadelphia, PA	http://www.cigna.com
Express Scripts	\$16.3 billion	Pharma Benefits Manager	Maryland Heights, MO	http://www.express-
Eli Lilly	\$14.7 billion	Pharmaceuticals	Indianapolis, IN	http://www.lilly.com
Humana	\$14.4 billion	Managed Care	Louisville, KY	http://www.humana.com
Amgen	\$12.4 billion	Biotech	Thousand Oaks, CA	
Health Net	\$11.9 billion	Managed Care	Woodland Hills, CA	http://www.healthnet.com

Any State and Any County

Example Search – Focus San Diego, California:

The search was administered using *ReferenceUSA* with the following criteria:

- segment of health and wellness industry (physicians, hospitals, alternative/holistic), annual sales between \$1 million and \$100 million (gross),
- amount of money spent on Yellow Page ads (as a proxy for web development),
- offices located in San Diego County, and
- offices located in the State of California.

California

Annual Sales Leaders*, by Health Industry Segment, California

\$1-\$5 Million	#	\$10 Million	#	\$20 Million	#
Naturopaths	4	Chiropractors	7	Services	16
Acupuncturists	24			Products	7
Nutritionists	4				
Physical Therapy	10				

*Names and contact information are provided in a separate document.

San Diego County

Annual Sales Leaders*, by Health Industry Segment, San Diego County

\$1-\$5 Million	#	\$2.5-\$4.99 Million	#	\$5+ Million	#	\$10-\$19.99 Million	#	\$20+ Million	#
Alternative/Holistic	11	Products	50	Physicians and Dentists	19	Hospitals, Centers, etc.	10	Hospitals, Centers, etc.	5
Hospitals, Centers, etc.	65					Products	15	Products	6

*Names and contact information are provided in a separate document.

Competition for Health and Wellness Practitioners

More and more practitioners are moving their message to the Internet. As a result, having a web presence is becoming less of an option and more of a requirement.

Challenges

Several challenges face any business endeavoring to provide health and wellness content on the Internet. There are legal issues, questions about credibility of information, and the challenge of capturing information quickly.

An article from *Medical News Today* in March 2007 highlights a conundrum faced by pharmaceutical companies when developing web sites. They feel they must participate in the trends of user-generated content and social networking, but must also continue to heavily monitor, test, and measure their content. Legal issues are leading them to consider hiring third-party vendors to run social media projects. Those interested in providing health information could benefit tremendously from Web 2.0 (colloquial for a new generation of web-based social networking sites and applications), however, this user-based information sharing requires a standard system of fact checking and posting within the site.

In addition to legal issues, ensuring credibility of information is a challenge. In one study, the criteria for usefulness of health information online were the same for both health professionals and non-professionals. In order of importance health information on sites was measured by:

- 1) *availability of information,*
- 2) *ease of finding information/navigation,*
- 3) *trustworthiness/credibility and*
- 4) *accuracy of information (2005, HON Survey of Health and Medical Internet Users).*

Those looking for credibility and accuracy of information will need to have their sites reviewed by HON or other watchdog Internet information agencies.

Many see the reliability of health information on the Internet diminishing over three-month cycles (or, the “Internet year”); therefore, ensuring the validity of information can be problematic.

Finally, most surveys about Internet use for health-related purposes are conducted electronically and are therefore subject to significant self-selection bias.

Conclusion

Health and wellness practitioners have a prime opportunity to get their message online. A thoughtful, strategic web presence that provides accurate and credible information is paramount to serving the needs of those seeking health and wellness information online and establishing stakeholder and community trust. Partnering with a business that has an academic system affiliation, like Spectrum Pacific Health, offers practitioners and businesses extraordinary financial, educational, and public service potential in both regional and national aspects.

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