

## eHealth's Influence Continues to Grow as Usage of the Internet by Physicians and Patients Increases

This issue of *Health Care News* provides a summary of the results of two Harris Interactive surveys conducted for, and published by, The Boston Consulting Group. Harris Interactive surveyed 400 physicians between February 20 and April 4, 2002, and 10,000 patients between April 16 and 23, 2002. For the full report, readers should review the complete issue of *Vital Signs*.

This third report in the *Vital Signs* series reveals that in the United States, ehealth is growing more pervasive among—and more relevant to—physicians and patients alike. Long after the ebubble has burst, physicians continue to move online and to report that the information they find in the virtual realm influences their real-world medical decisions in significant ways. In addition, more physicians than ever before are adopting online tools to deliver patient care. Similarly, the Internet's reach has expanded, and its call to action has increased, among the overall patient population. Indeed, ehealth has advanced and accelerated the movement first initiated by direct-to-consumer drug advertising: the migration of patients toward more active engagement in their care.

**The Internet continues to have a major impact on physicians in the United States.** As we reported in 2001, physicians continue to spend about three hours a week online for professional reasons. Our latest data show that they spend more than half of that time on the Internet at home, where they are free from the distractions of the office and are otherwise unreachable. Once online, the vast majority of doctors continue to use the Internet to augment their clinical knowledge. Most physicians online also say that the information they find on the Internet has an impact on their knowledge about symptoms, treatments, and possible diagnoses.

Around three-quarters continue to report that the information they find online has an impact on their prescription decisions. Furthermore, physicians have begun to embrace more sophisticated tools and to use the Internet in more discerning ways—engaging in more interactive activities, adding more types of websites to their repertoire, and referring patients to websites.

**Electronic prescribing, electronic medical records, and remote disease monitoring are garnering wider audiences as obstacles to the adoption of these tools are overcome.** In the past year, use of the tools has grown beyond a core group of early adopters. Although the number of physicians is still small, about 40 percent more now use at least one of the three tools. Overall, doctors are turning to patient-care tools because they deliver on the two dimensions most important to them: enhanced quality of care and improved efficiency. Online communication with patients—the fourth major tool explored in previous *Vital Signs* reports—is holding steady. Of the one-quarter of doctors who communicate with patients online, most do so only with the handful who request this method of consultation.

### ♦ EDITORS ♦

#### Humphrey Taylor

Chairman of *The Harris Poll*®

#### Robert Leitman

Group President, Health Care, Education & Public Policy



MARKET RESEARCH

**The Harris Poll**® PEOPLE

**Doctors are not alone online: About 80 percent of all patients we surveyed now search the Internet for information about health-related topics.** On average, patients—by which we mean people with chronic medical conditions—are going online for health information about nine times a year. The vast majority of them report that the information they find enhances their understanding of their health problems, has an impact on how they manage their overall health, affects how they communicate with their doctors, and improves their compliance with prescribed treatments. Once they've logged on, patients continue to visit about three to five health websites regularly. They still find them primarily through general search engines. WebMD continues to lead the pack of health care sites, followed by the health sections of mass-market portals, such as Yahoo! and MSN.

**Exactly how patients use the Internet and how they are influenced by the information they find there continue to differ on the basis of the severity of their illness and their attitudes about their own role in their health care.** Although ehealth is gaining ground among all patients, its impact—and the growth of that impact—are most pronounced among patients whose conditions are most severe, who visit their doctors most frequently, and who take the greatest number of prescription drugs.

The data show that ehealth is an increasingly effective channel for reaching this audience, which is most attractive to health care players.

**As ehealth evolves, it is changing the economics, interrelationships and competitive landscape in the industry—gradually but fundamentally. Health care players must keep pace with these changes by honing their strategies and experimenting with new ones.** In recent years, pharmaceutical marketing has focused on winning the drug-sales game largely through vast sales forces. But the interactive and automatic nature of ehealth—and eprescribing, in particular—could change the nature of that game. In fact, it will bolster formularies, shifting the balance of power and influence to managed care organizations.

To remain competitive in such a dynamic landscape, health care players must adjust their strategies as ehealth evolves. They must understand that ehealth poses different kinds of opportunities and challenges to different types of organizations. We believe that as the influence of the online channel increases among doctors and patients alike, all health care players should continue to add the Internet and Web-based technologies to their strategic and operational initiatives. Rather than being viewed as a separate and distinct channel, the Internet should be integrated closely with offline capabilities currently used to reach patients and their doctors. Already, as more and more physicians recommend health-related websites to their patients, the means for reaching physicians and patients are converging. As a result, health care players should no longer market to two individual audiences but target both physicians and patients with a unified approach that delivers consistent messages across audiences and channels.

**TABLE 1**

**The Internet Remains A Powerful Tool For Informing And Influencing Physicians...**

“Physicians can use the Internet for keeping up-to-date on medical information. Do you use the Internet to...?”

Base: Doctors online

|                                       | 2001 % | 2002 % |
|---------------------------------------|--------|--------|
| Research clinical information         | 90     | 90     |
| Read articles from medical journals   | 78     | 74     |
| Communicate with colleagues           | 61     | 63     |
| Complete continuing medical education | 45     | 58     |
| Attend online conferences             | 31     | 42     |

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

**TABLE 2**

**...And It Is Having A Significant Impact On The Care They Provide**

“Has the information you have found online had a major impact, minor impact, or no impact at all on...?”

Base: Doctors who regularly visit at least one health-related website

|  |      |   | Major Impact | Minor Impact | No Impact At All |
|--|------|---|--------------|--------------|------------------|
| Your knowledge about new treatments, including drugs | 2001 | % | 34           | 59           | 7                |
|  | 2002 | % | 35           | 61           | 4                |
| Your knowledge about symptoms and possible diagnoses | 2001 | % | 21           | 66           | 13               |
|  | 2002 | % | 19           | 72           | 9                |
| The way you interact with your patients              | 2001 | % | 19           | 60           | 21               |
|  | 2002 | % | 12           | 64           | 24               |
| Your prescription of treatments, including drugs     | 2001 | % | 13           | 60           | 26               |
|  | 2002 | % | 13           | 60           | 26               |
| The types of diagnoses you have made                 | 2001 | % | 11           | 68           | 21               |
|  | 2002 | % | 11           | 70           | 19               |

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

NOTE: In 2001, the number of respondents who regularly visited at least one health-related website was 297; in 2002 it was 338.

**TABLE 3**

**Doctors Are Adding Sites Sponsored By Professional Associations To Their Online Repertoire**

“Which three website(s) do you visit *most often* for health-related information?”

Base: Doctors who regularly visit at least one health-related site

|                                    | 2001 % | 2002 % |
|------------------------------------|--------|--------|
| Professional association websites* | 32     | 43     |
| WebMD                              | 26     | 23     |
| Medscape                           | 20     | 14     |
| Physicians' Online                 | 18     | 11     |
| CDC                                | 7      | 8      |
| Medline                            | 10     | 7      |
| MD Consult                         | 7      | 5      |
| PubMed                             | 6      | 5      |

\*Examples include the American Academy of Family Physicians, the American Academy of Pediatrics, and the American Medical Association.

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

NOTE: In 2001, the number of respondents who regularly visited at least one health-related site was 297; in 2002 it was 338.

**TABLE 4**

**More Physicians Are Embracing Interactive Electronic Tools**

“Does your practice use any of the following computer-based or Web-enabled clinical management tools?”

Base: Doctors surveyed

|                                    |      |   | Currently Use | Plan to Use Within 18 Months |
|------------------------------------|------|---|---------------|------------------------------|
| Electronic prescribing             | 2001 | % | 11            | 20                           |
|                                    | 2002 | % | 16            | 21                           |
| Electronic medical records         | 2001 | % | 22            | 20                           |
|                                    | 2002 | % | 30            | 24                           |
| Remote disease monitoring          | 2001 | % | 5             | 9                            |
|                                    | 2002 | % | 7             | 8                            |
| Online communication with patients | 2001 | % | 26            | 13                           |
|                                    | 2002 | % | 25            | 9                            |

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

**TABLE 5**

**ePrescribing Improves Formulary Compliance And Quality Of Care**

“Has writing prescriptions electronically had a major impact, minor impact or no impact at all on...?”

Base: Doctors who have adopted eprescribing

|  |      |   | Major Impact | Minor Impact | No Impact At All |
|--|------|---|--------------|--------------|------------------|
| Improving overall efficiency                       | 2001 | % | 36           | 48           | 14               |
|  | 2002 | % | 26           | 43           | 31               |
| Saving the practice money                          | 2001 | % | 12           | 45           | 28               |
|  | 2002 | % | 18           | 49           | 33               |
| Improving patient satisfaction                     | 2001 | % | NA           | NA           | NA               |
|  | 2002 | % | 22           | 52           | 26               |
| Delivering better care                             | 2001 | % | 33           | 43           | 21               |
|  | 2002 | % | 32           | 47           | 20               |
| Improving compliance with managed care formularies | 2001 | % | 45           | 36           | 16               |
|  | 2002 | % | 27           | 55           | 18               |

NA – Data not available because survey choices differed in 2001 and 2002.

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

NOTE: In 2001, the number of respondents who started writing prescriptions electronically was 42; in 2002, it was 63.

Figures do not always add up to 100 percent because respondents could also choose “not sure” or “decline to answer.”

**TABLE 6**

**Electronic Medical Records Improve Formulary Compliance And Quality Of Care**

“Has using electronic medical records had a major impact, minor impact or no impact at all on...?”

Base: Doctors who have adopted EMRs

|  |      |   | Major Impact | Minor Impact | No Impact At All |
|--|------|---|--------------|--------------|------------------|
| Improving overall efficiency                       | 2001 | % | 56           | 36           | 7                |
|  | 2002 | % | 25           | 33           | 42               |
| Saving the practice money                          | 2001 | % | 29           | 40           | 16               |
|  | 2002 | % | 32           | 42           | 26               |
| Improving patient satisfaction                     | 2001 | % | NA           | NA           | NA               |
|  | 2002 | % | 25           | 53           | 22               |
| Delivering better care                             | 2001 | % | 46           | 42           | 10               |
|  | 2002 | % | 53           | 34           | 13               |
| Improving compliance with managed care formularies | 2001 | % | 26           | 41           | 30               |
|  | 2002 | % | 58           | 31           | 11               |

NA – Data not available because survey choices differed in 2001 and 2002.

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

NOTE: In 2001, the number of respondents who adopted EMRs was 89; in 2002 it was 130. Figures do not always add up to 100 percent because respondents could also choose “not sure” or “decline to answer.”

**TABLE 7**

**Remote Disease Monitoring Improves Quality Of Care And Patient Satisfaction**

“Has using remote monitoring had a major impact, minor impact or no impact at all on...?”

Base: Doctors who have adopted RDM

| Impact of RDM on:                                  |      |   | Major Impact | Minor Impact | No Impact At All |
|--|------|---|--------------|--------------|------------------|
| Improving overall efficiency                       | 2001 | % | 26           | 58           | 16               |
|  | 2002 | % | 29           | 54           | 17               |
| Saving the practice money                          | 2001 | % | 16           | 42           | 21               |
|  | 2002 | % | 12           | 38           | 50               |
| Improving patient satisfaction                     | 2001 | % | NA           | NA           | NA               |
|  | 2002 | % | 39           | 57           | 4                |
| Delivering better care                             | 2001 | % | 32           | 52           | 16               |
|  | 2002 | % | 43           | 50           | 7                |
| Improving compliance with managed care formularies | 2001 | % | NA           | NA           | NA               |
|  | 2002 | % | 7            | 52           | 41               |

NA – Data not available because survey choices differed in 2001 and 2002.

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

NOTE: In 2001, the number of respondents who started monitoring was 19; in 2002, it was 28. Figures do not always add up to 100 percent because respondents could also choose “not sure” or “decline to answer.”

**TABLE 8**

**Doctors Are Communicating Online Because Patients Request It**

“What is the *primary* reason you started using the Internet to communicate with your patients?”

Base: Doctors who communicate with patients online

|                                    | 2001 % | 2002 % |
|------------------------------------|--------|--------|
| Your patients requested it         | 41     | 51     |
| To improve your overall efficiency | 30     | 28     |
| To deliver better care             | 16     | 12     |
| Other                              | 9      | 9      |

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

NOTE: In 2001, the number of respondents who communicated with patients over the Internet was 103; in 2002, it was 100.

**TABLE 9**

**Online Communication Improves Patient Satisfaction And Quality Of Care**

“Has using the Internet to communicate with your patients had a major impact, minor impact or no impact at all on...?”

Base: Doctors who communicate with patients online

| Impact of online communication on:                 |      |   | Major Impact | Minor Impact | No Impact At All |
|--|------|---|--------------|--------------|------------------|
| Improving overall efficiency                       | 2001 | % | 13           | 52           | 34               |
|  | 2002 | % | 8            | 59           | 33               |
| Saving the practice money                          | 2001 | % | 2            | 40           | 55               |
|  | 2002 | % | 6            | 32           | 62               |
| Improving patient satisfaction                     | 2001 | % | 24           | 66           | 9                |
|  | 2002 | % | 19           | 67           | 14               |
| Delivering better care                             | 2001 | % | 14           | 68           | 16               |
|  | 2002 | % | 10           | 63           | 27               |
| Improving compliance with managed care formularies | 2001 | % | NA           | NA           | NA               |
|  | 2002 | % | 4            | 26           | 70               |

NA – Data not available because survey choices differed in 2001 and 2002.

Sources: BCG/Harris Interactive proprietary physician surveys, 2001 and 2002.

NOTE: In 2001, the number of respondents who communicated with patients over the Internet was 103; in 2002, it was 100. Figures do not always add up to 100 percent because respondents could also choose “not sure” or “decline to answer.”

**TABLE 10**

**WebMD and Mass-Market Portals Lead the Pack of eHealth Sites**

“Which three websites do you visit most frequently?”

Base: Patients accessing health information online

|                    | 2001 % | 2002 % |
|--------------------|--------|--------|
| WebMD              | 50     | 53     |
| MSN Health         | NA     | 25     |
| Yahoo! Health      | 27     | 25     |
| AOL Health Channel | 14     | 15     |
| Mayoclinic.com     | 14     | 14     |
| Drugstore.com      | 11     | 10     |
| iVillage Health    | NA     | 9      |
| Dr.Koop.com        | 12     | 7      |
| Merck-Medco        | NA     | 6      |
| Ediets.com         | 5      | 5      |
| Medscape           | 6      | 5      |
| Weight Watchers    | NA     | 5      |
| Other              | 37     | 37     |

NA – Data not available because survey choices differed in 2001 and 2002.

Sources: BCG analysis: *Harris Interactive 10,000 Patients Survey*, 2001 and 2002.

NOTE: In 2001, the number of respondents who used the Internet for health-related information was 9,908; in 2002 it was 9,505. Results were weighted to reflect the demographics of the entire online population

**TABLE 11**

**Sites Sponsored By Pharmaceutical Companies Rank Second Among Patients**

“Which of the following have sponsored the health care websites you have visited?”

Base: Patients accessing health information online

|  | 2002 % |
|--|--------|
| Health pages created by online services                  | 50.9   |
| Pharmaceutical companies                                 | 27.3   |
| Academic or research institutions                        | 27.2   |
| Medical journals   | 27.2   |
| Patient support of advocacy groups for specific diseases | 21.3   |
| Health insurance companies or managed care plans         | 20.7   |
| Medical societies  | 19.0   |

Sources: BCG analysis: *Harris Interactive 10,000 Patients Survey*, 2001 and 2002.

NOTE: In 2001, the number of respondents who used the Internet for health-related information was 9,908; in 2002 it was 9,505. Results were weighted to reflect the demographics of the entire online population

# Health Care News

3 Volume

6 Issue

2003  
April 17

## Methodology

This survey was conducted online within the United States between April 16 and 23, 2002, among a nationwide cross-section of 11,494 adults (ages 18+) who have one or more of 45 chronic or recurring medical conditions. Figures for age, sex, education, income, race and ethnicity, region, health status, and whether or not an individual has a chronic condition were weighted to bring them into line with the chronically ill population online.

Theoretically, with a probability sample of this size, one can say with 95 percent certainty that the results have a statistical precision of plus or minus one percentage point of what they would be if the entire adult population had been polled with complete accuracy. This online survey is not a probability sample.

## About Harris Interactive®

**Harris Interactive** ([www.harrisinteractive.com](http://www.harrisinteractive.com)) is a worldwide market research and consulting firm best known for *The Harris Poll*®, and for pioneering the Internet method to conduct scientifically accurate market research. Headquartered in Rochester, New York, U.S.A., Harris Interactive combines proprietary methodologies and technology with expertise in predictive, custom and strategic research. The Company conducts international research through wholly owned subsidiaries—London-based **HI Europe** ([www.hieurope.com](http://www.hieurope.com)) and Tokyo-based **Harris Interactive Japan**—as well as through the Harris Interactive Global Network of local market- and opinion-research firms, and various U.S. offices. EOE M/F/D/V

To become a member of the Harris Poll Online<sup>SM</sup> and be invited to participate in future online surveys, visit [www.harrispollonline.com](http://www.harrispollonline.com).

For more information, please contact us at:

**877.919.4765**

or visit our website at

**[www.harrisinteractive.com](http://www.harrisinteractive.com)**

**Media inquiries, contact:**

Nancy Wong 585.214.7316

©2003, Harris Interactive Inc. All rights reserved.  
Other product and/or company names used herein are trademarks of their respective owners.

Harris Heritage. 7 Interactive Power.