



CALIFORNIA
HEALTHCARE
FOUNDATION

SNAPSHOT

The State of Health Information Technology in California: Consumer Perspective

2008

Introduction

Despite a great thirst for online health information, most consumers in California are wary about using health information technology (HIT), such as personal health records (PHRs). Yet HIT could greatly improve the safety and quality of the care they receive and enhance physician-patient communication.

This survey provides a comprehensive snapshot of California consumers’ adoption, use, and perception of HIT. The results reveal that most consumers are not actively using online tools, including PHRs, email with health care professionals, and appointment scheduling. Reasons include concerns about security and confidentiality and the unavailability of such tools.

AMONG THE SNAPSHOT HIGHLIGHTS:

- Nearly half of California consumers obtained health or medical information on the Internet within the last 12 months. They are discussing this information with family members, friends, and health care providers.
- While 40 percent of consumers are interested in accessing a PHR online, only 2 percent currently do.
- More than half are very or somewhat interested in scheduling an appointment online, but only 7 percent have scheduled an appointment this way. The two top reasons they cite for not scheduling an appointment online are concerns about security and confidentiality, and the unavailability of this option.
- Nearly half are interested in receiving email from their physician, but only 4 percent have communicated this way.
- Seventy percent say it is important that their physician’s office incorporates technology into its practice.

Use of HIT by California consumers is low. Until their concerns about security and confidentiality are addressed, such use may continue to lag behind their significant desire for health information and prevent patients from becoming more active partners in their care.

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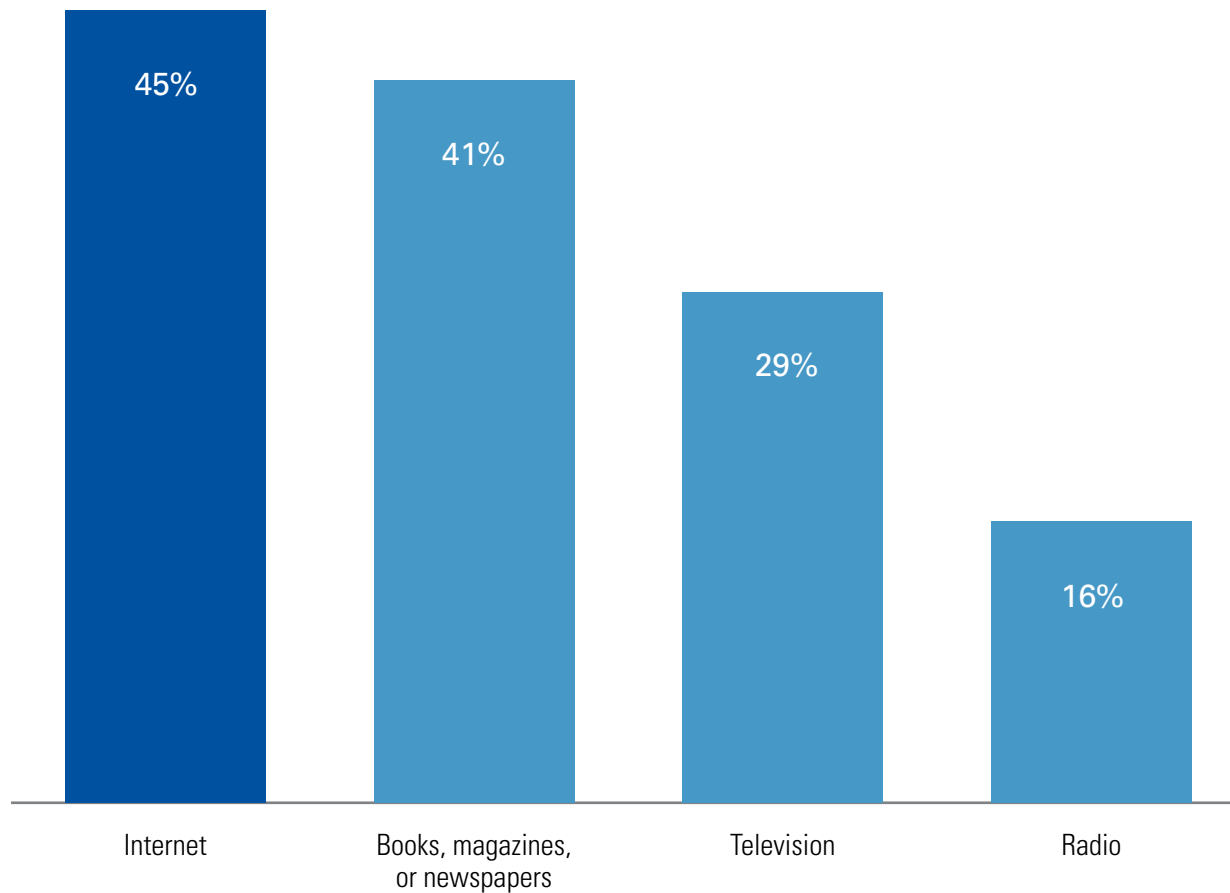
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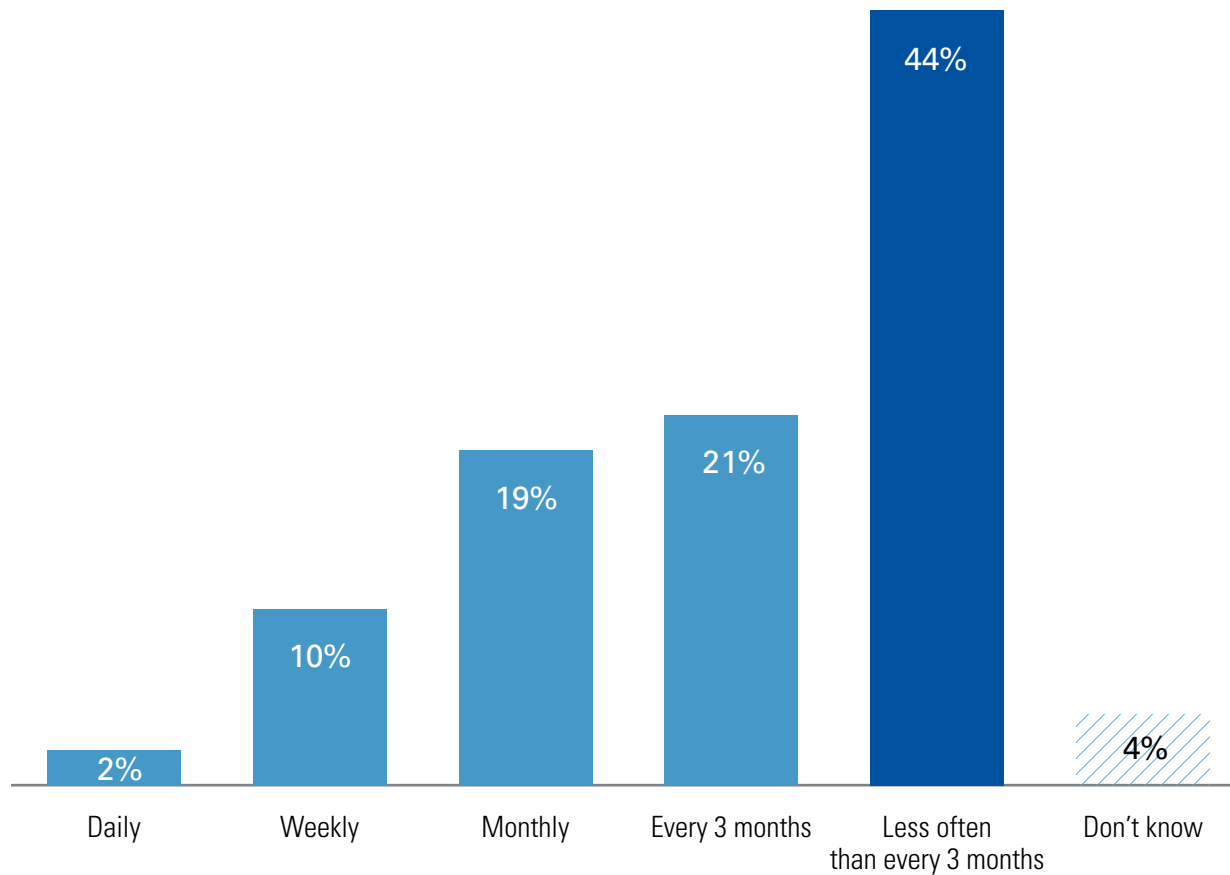
Sources of Health/Medical Information, California, 2007



Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Nearly half of consumers reported that, within the last 12 months, they obtained health or medical information on the Internet.

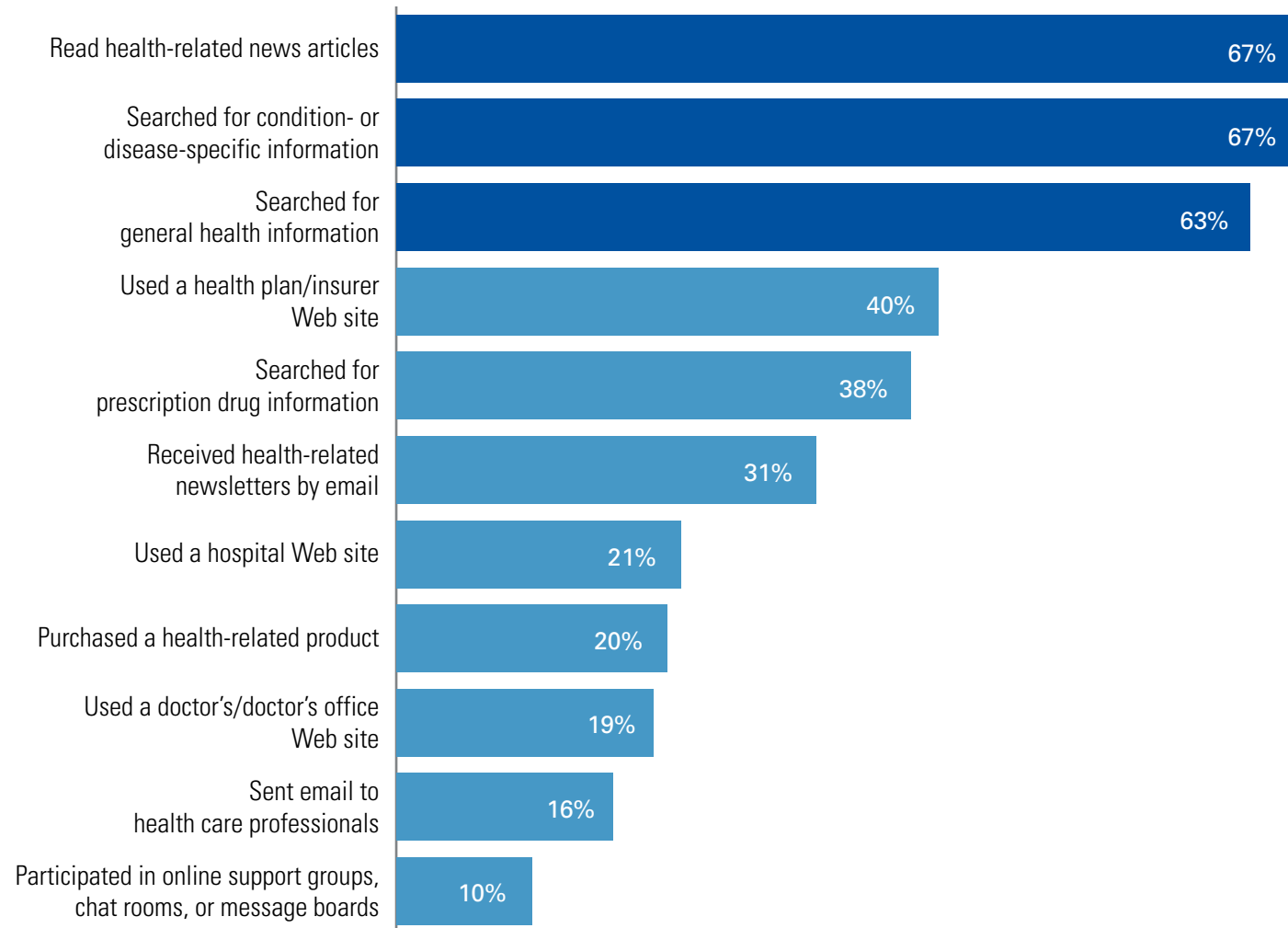
Frequency of Online Visits by Those Seeking Health Information, California, 2007



Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

About half of consumers go online at least once every three months seeking health information.

Health-Related Activities Online, California, 2007



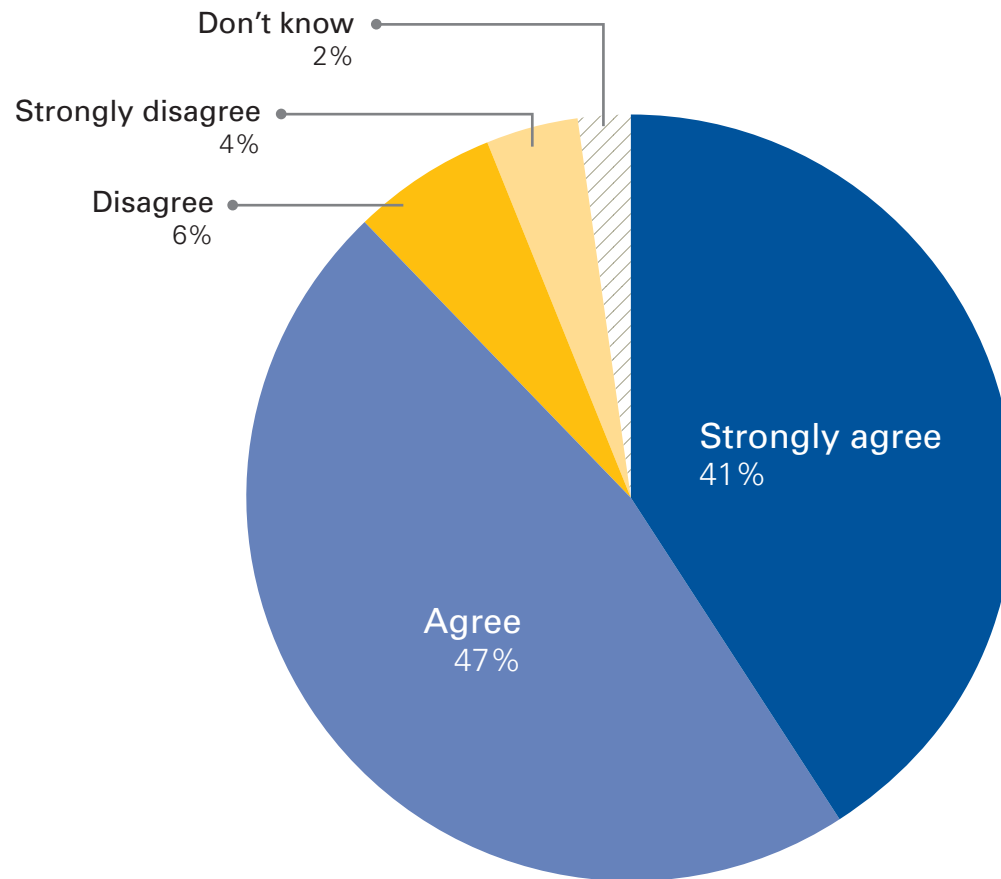
Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

Searching for Health Information Online

Online consumers are much more likely to tap the Internet to search for general or specific health-related information than they are to communicate with health professionals or use a health plan, hospital, or provider Web site.

Internet's Role in Ease of Access to Health-Related Information, California, 2007

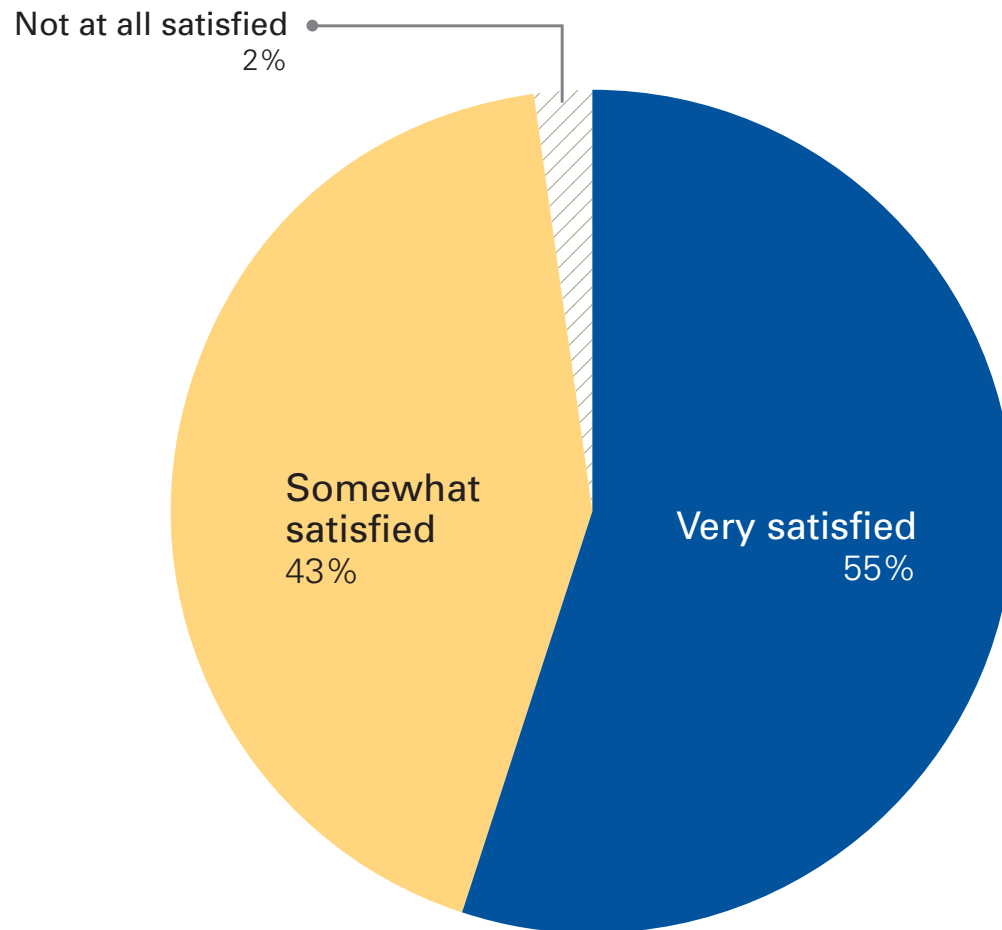
"The Internet has made it easier to get information about health care news, products, and treatment options."



Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

The vast majority of consumers believe that the Internet has made it easier to get health care news and information about products and treatment options.

Satisfaction With Internet Health/Medical Content, California, 2007



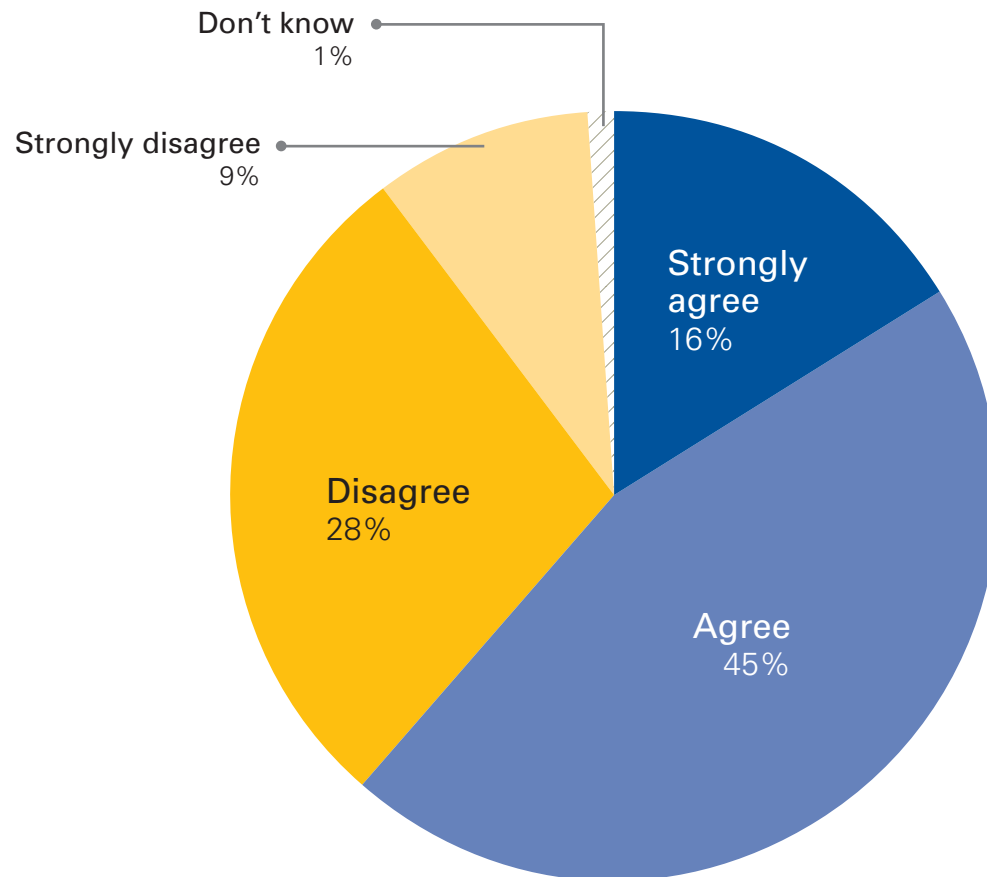
Searching for Health Information Online

More than half of consumers indicated they were “very satisfied” with the health or medical information they received online.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Sharing Online Health Information With Family Members/Friends, California, 2007

"I often tell family members and friends about health information I have found online that is relevant to them."



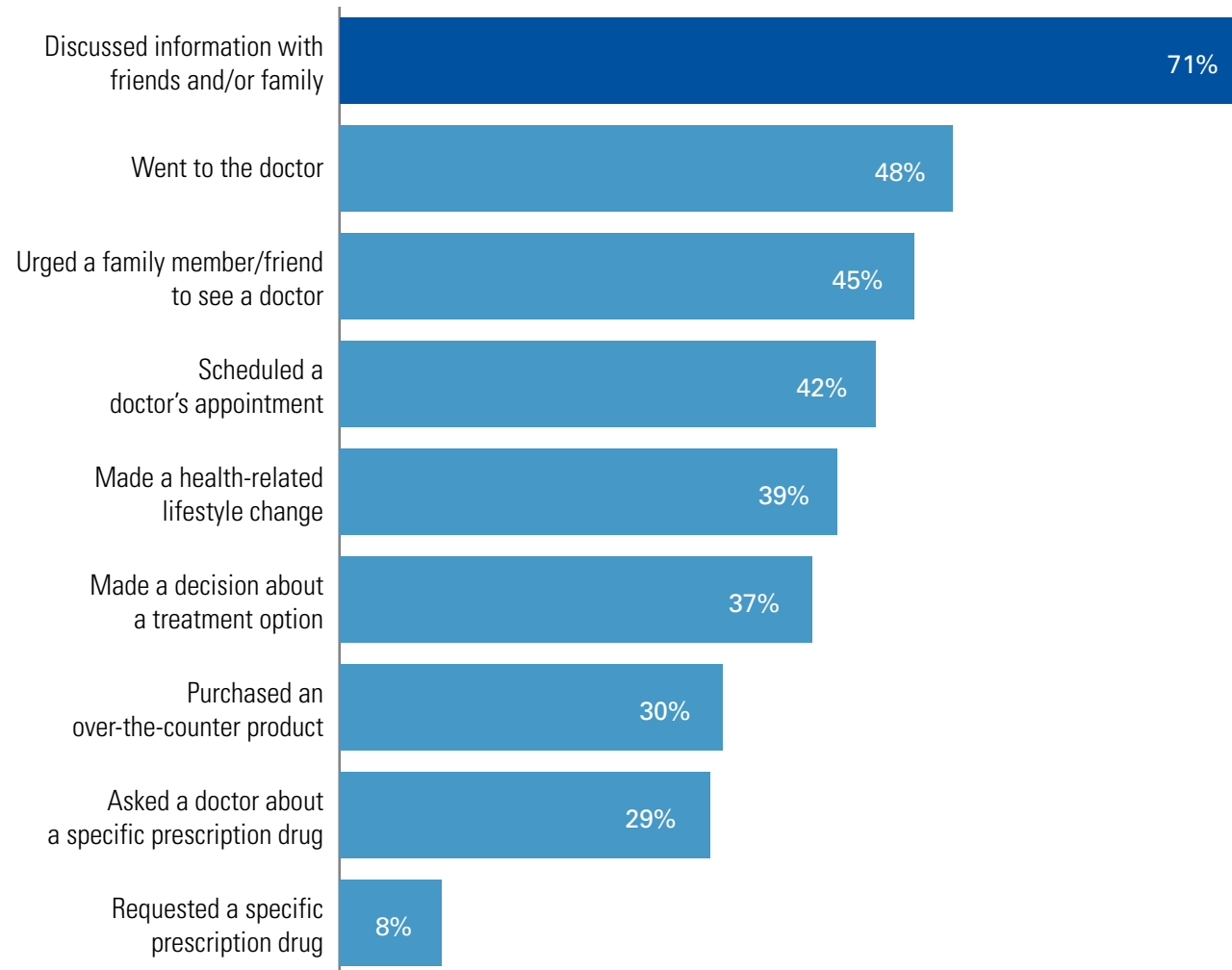
Note: Pie segments don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Searching for Health Information Online

Sixty-one percent of consumers said they often tell family members and friends about relevant health information they find online.

Activities After Retrieving Health/Medical Information Online, California, 2007

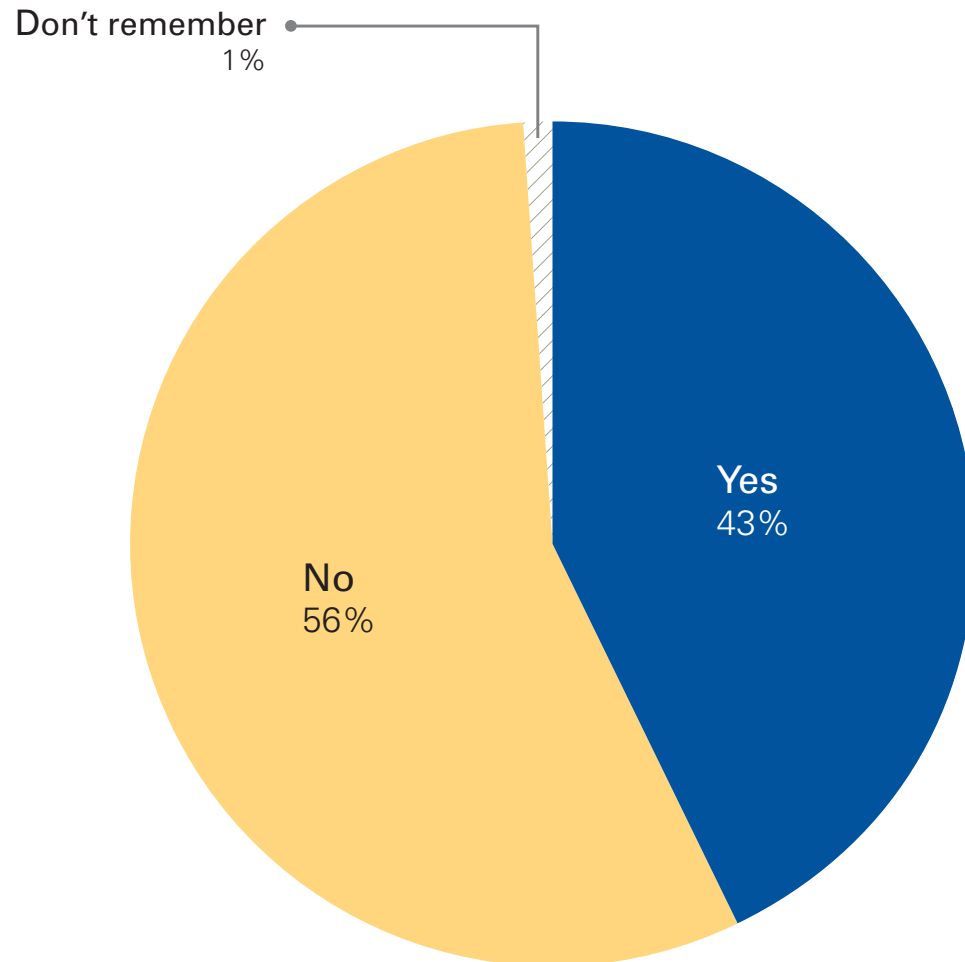


Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

Searching for Health Information Online

The majority of consumers reported that, after they retrieved health or medical information online, they discussed it with friends and/or family members.

Discussing Online Health Information With a Physician, California, 2007



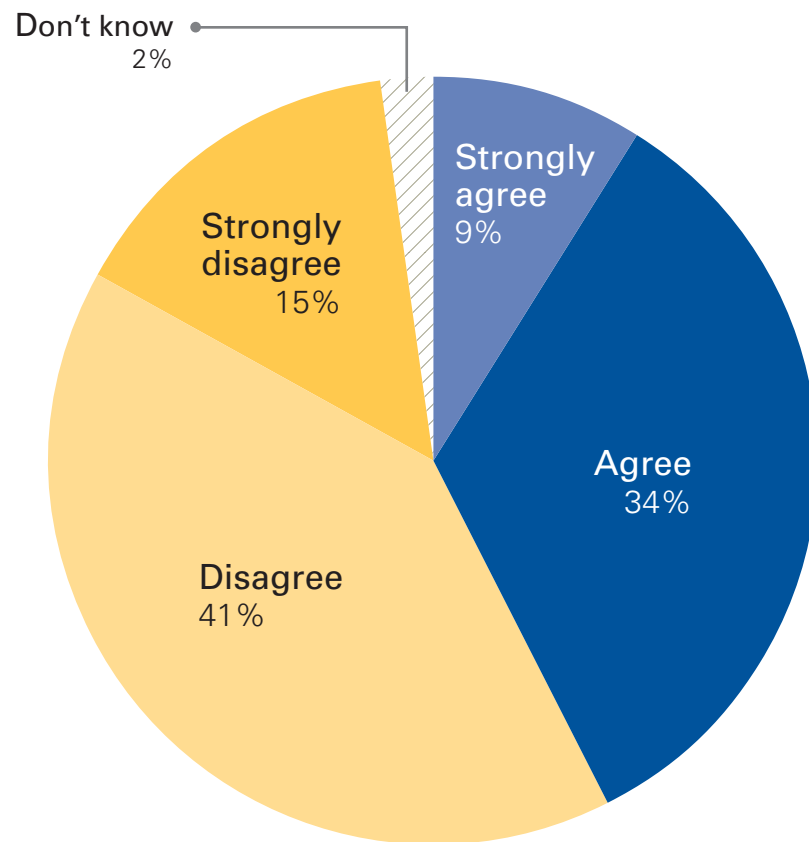
Searching for Health Information Online

Forty-three percent of consumers reported that, after they obtained health information online, they discussed it with their doctor at an appointment.

Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

Personal Health Decisions Based on Internet Content, California, 2007

"I depend on the Internet to help me make personal health decisions."



Note: Pie segments don't add up to 100 percent due to rounding.

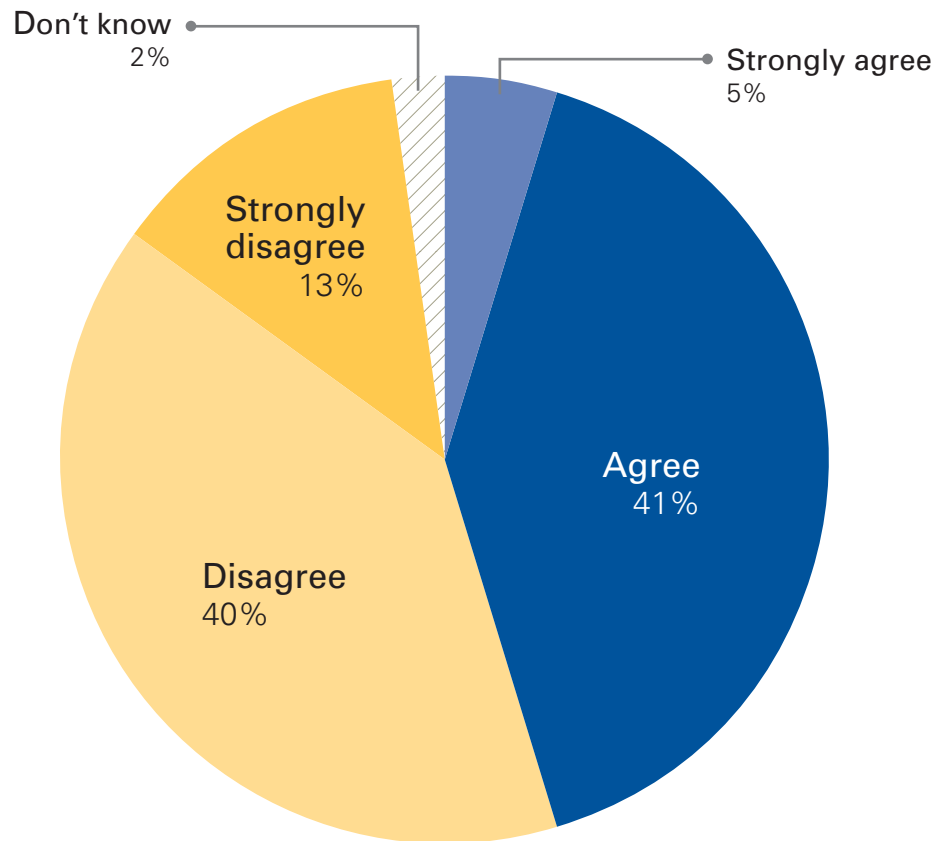
Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Searching for Health Information Online

Forty-three percent of consumers said they depend on the Internet to help them make personal health decisions.

Change in Actions/Behavior After Viewing Health Information Online, California, 2007

"I often change my actions or behavior after viewing health information online."



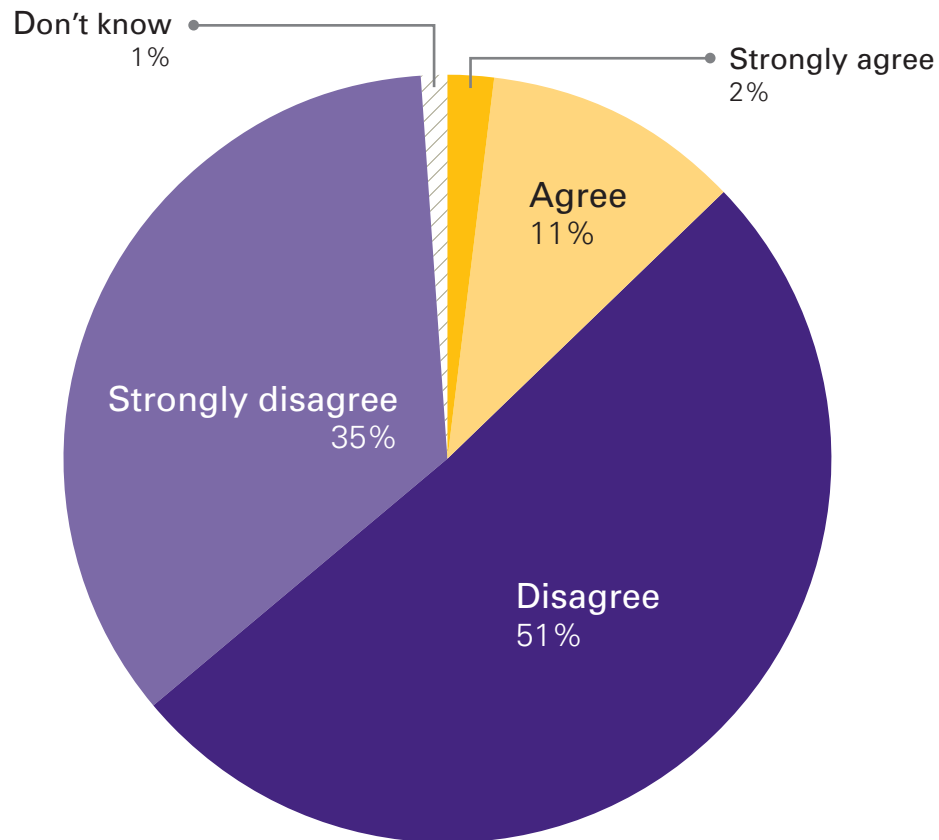
Note: Pie segments don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Forty-six percent of consumers said they often change their actions or behavior after viewing health information online.

Contributing or Posting Health Content Online, California, 2007

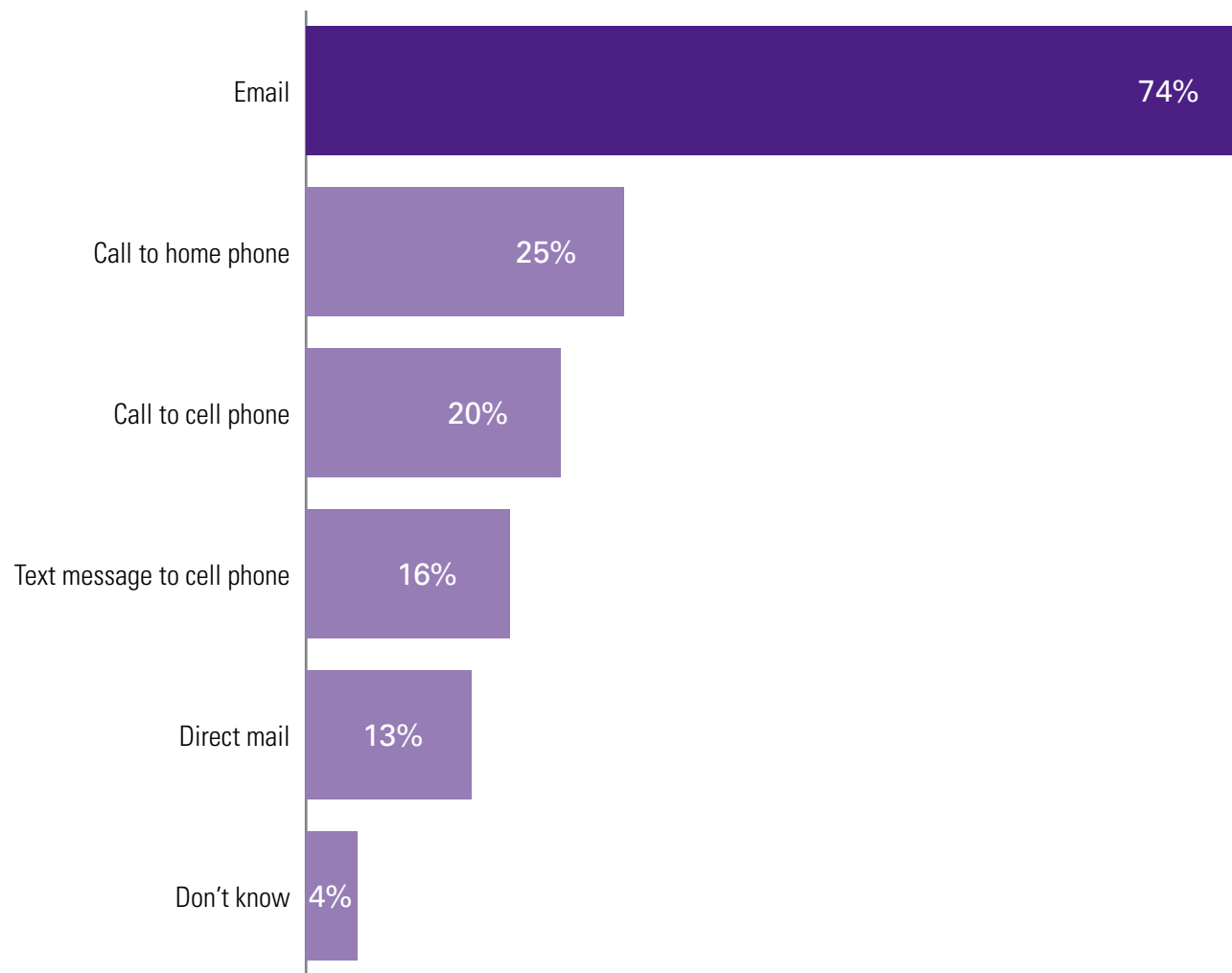
"I regularly contribute or post health content online."



Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

Eighty-six percent of consumers said they don't regularly contribute or post online health content, such as commenting on blogs.

Interest in Receiving Prescription Refill Reminders, California, 2007



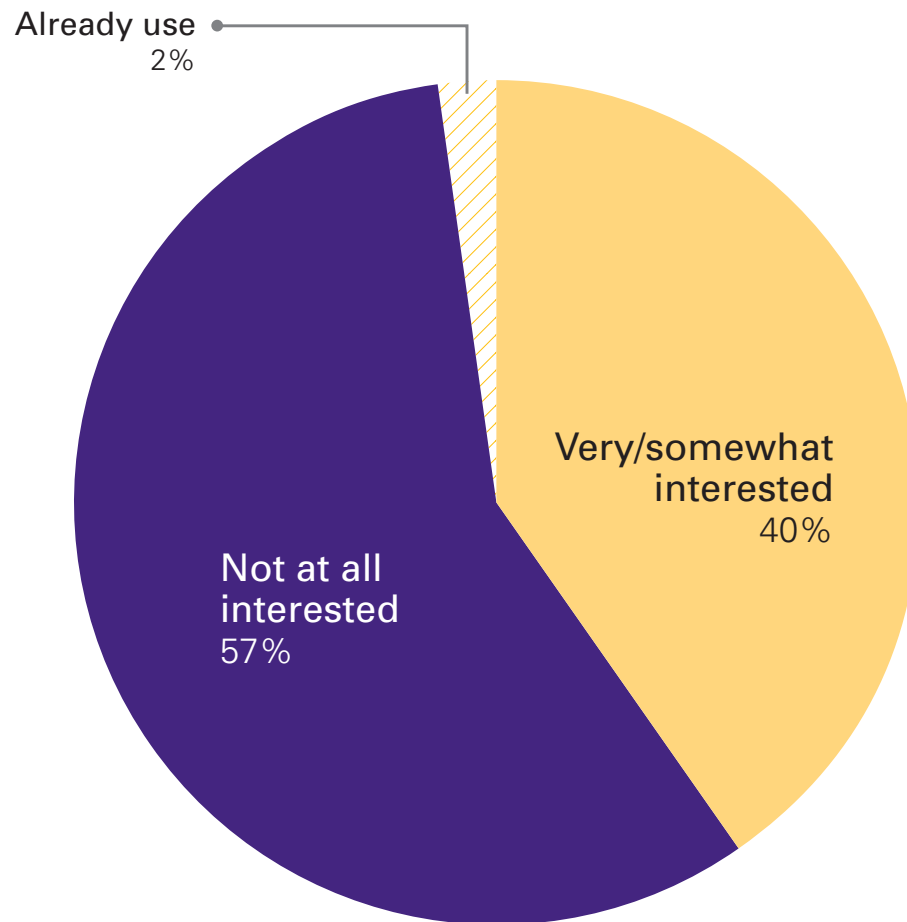
Note: n=39, a small sample.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

The Internet as an Interactive Health Tool

When given a choice of methods to receive prescription refill reminders, nearly three-quarters expressed an interest in receiving such notifications by email.

Interest in Accessing PHRs* Online, California, 2007



*The California HealthCare Foundation defines personal health record as an electronic tool that offers a comprehensive view of personal health information, including information the patient contributes; information from doctors, such as diagnoses and test results; and information from pharmacies and insurance companies that allows patients to coordinate their personal health information.

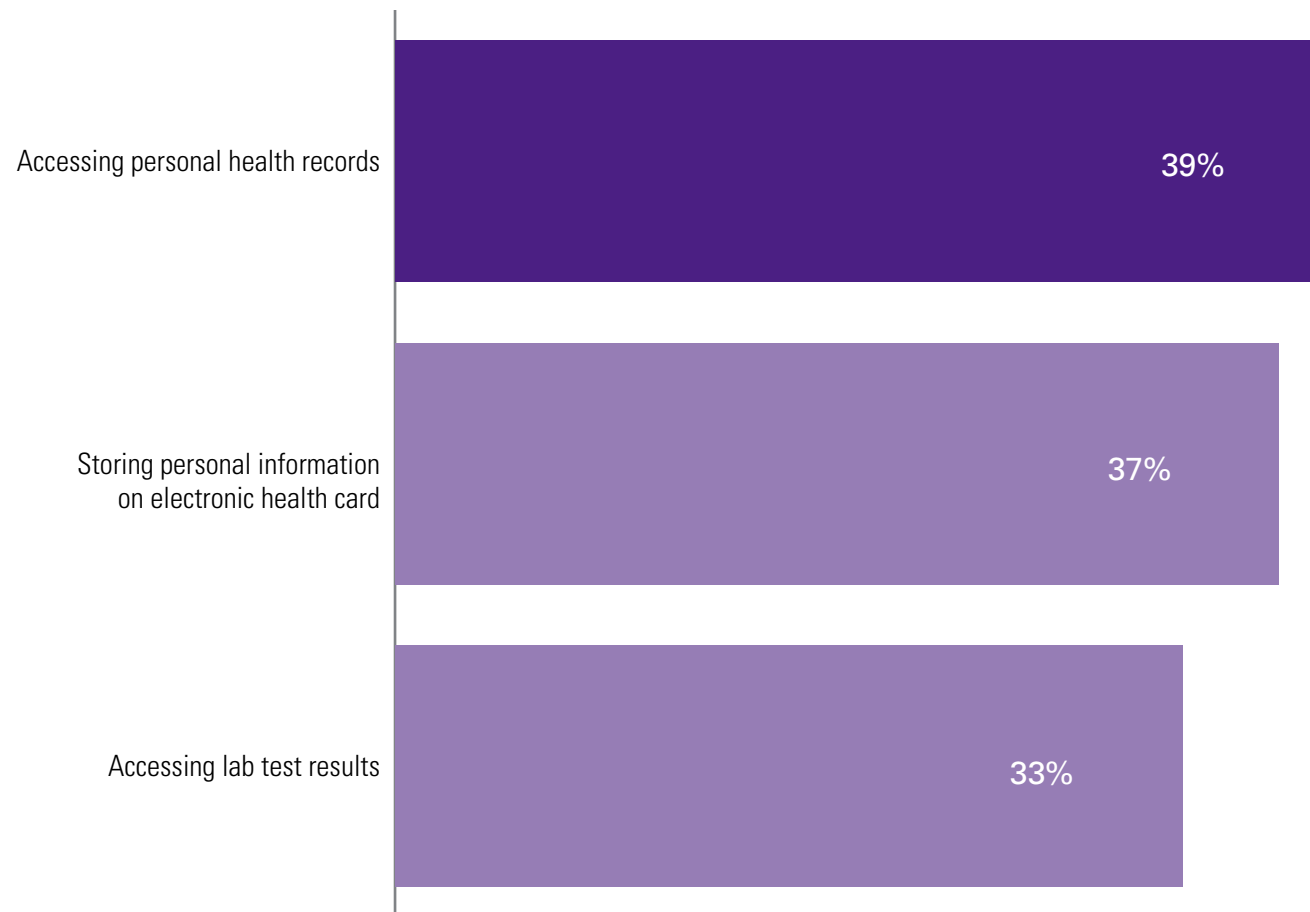
Note: Pie segments don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

The Internet as an Interactive Health Tool

A majority of consumers said they were “not at all interested” in accessing personal health records (PHRs) online. Only 2 percent already do.

Among Non-Users of Health Information Technologies, Activities That Elicit Security/Confidentiality Concerns, California, 2007



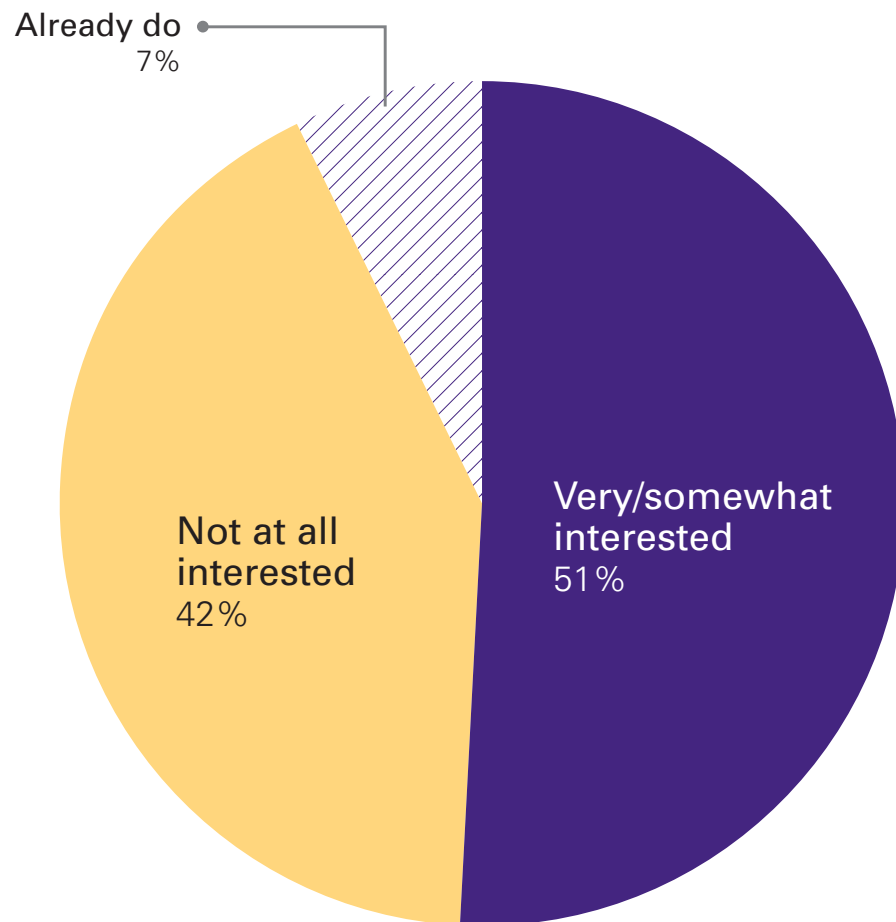
Note: Non-users don't access personal health records or lab tests online, they don't store personal health information on an electronic card, and their doctors don't store patient records electronically.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

The Internet as an
Interactive Health Tool

Among non-users, accessing personal health records raises the greatest security and confidentiality concerns.

Interest in Scheduling Appointment Online, California, 2007

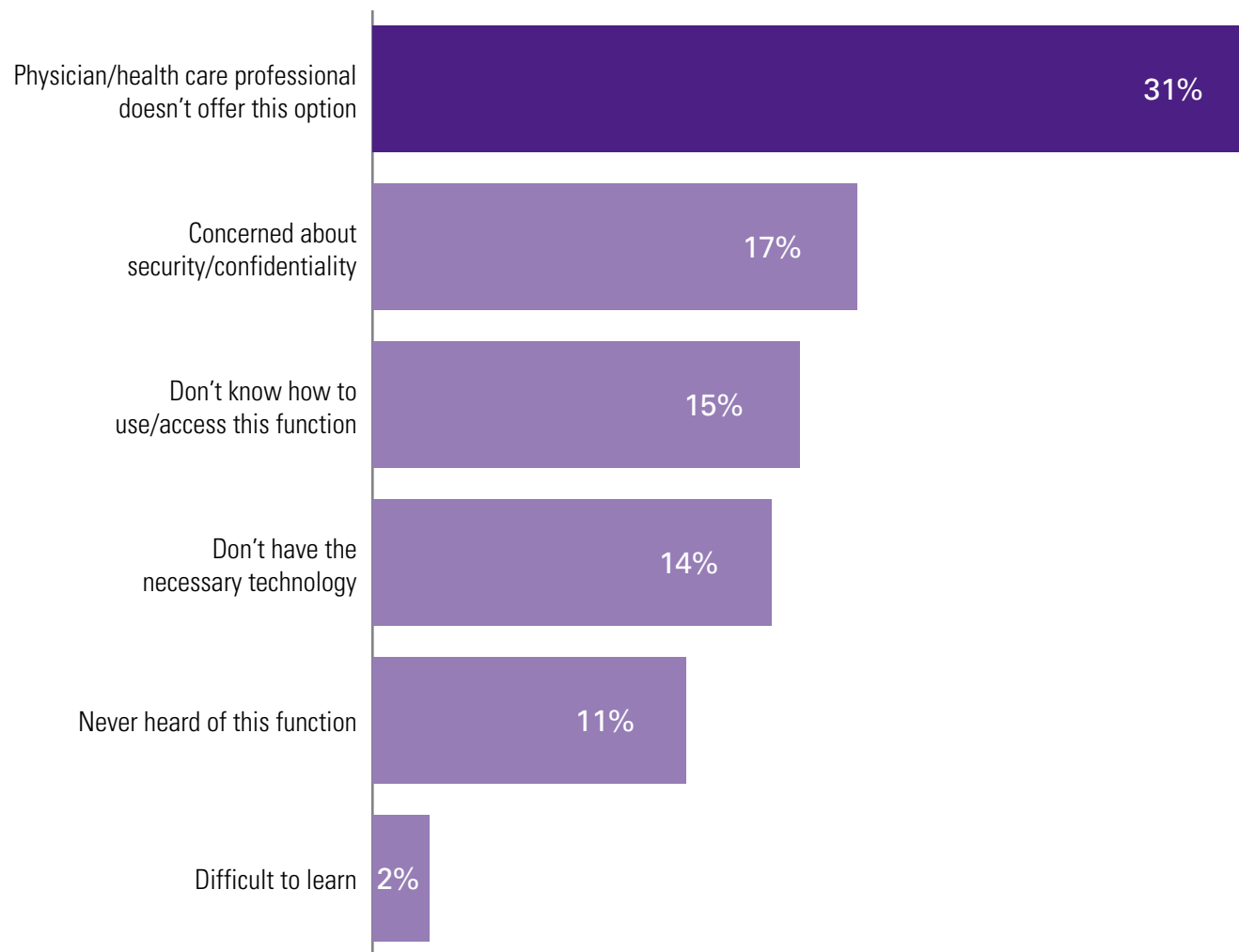


The Internet as an Interactive Health Tool

More than half of consumers said they were “very or somewhat interested” in scheduling a medical appointment online. Only 7 percent already schedule appointments this way.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Reasons for Not Scheduling Appointment Online, California, 2007

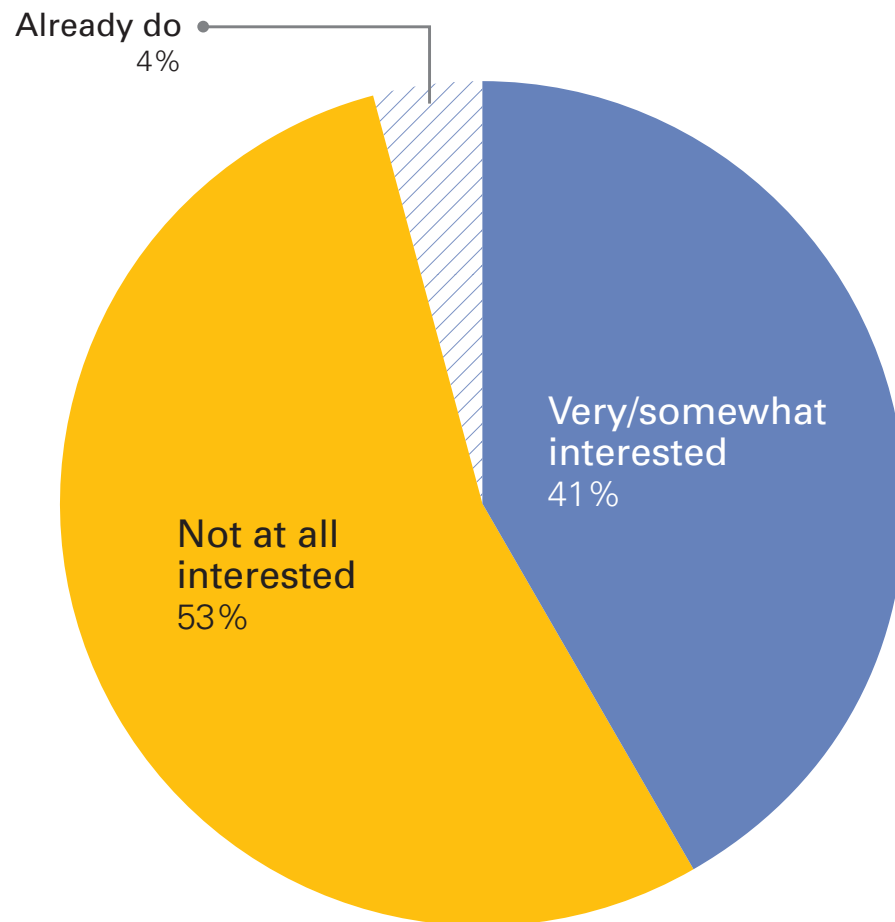


Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

The Internet as an Interactive Health Tool

Among consumers who don't schedule medical appointments online, the most frequently cited reason for not doing so is that their physician/health care professional doesn't offer this option.

Interest in Sending Email to Physician, California, 2007



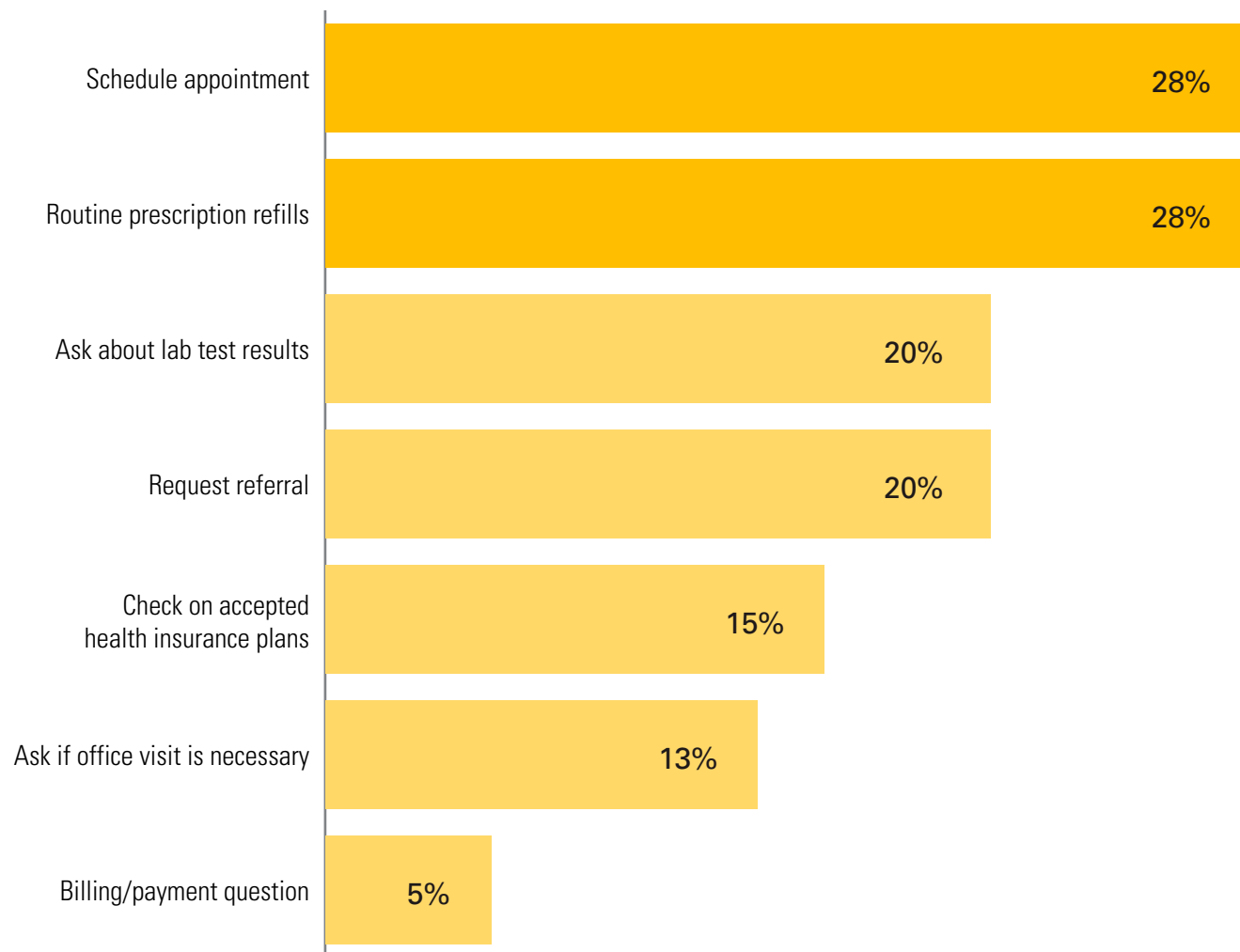
Note: Pie segments don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Communicating with Health Care Providers

Fifty-three percent of consumers said they were “not at all interested” in sending email to their doctor’s office. Only 4 percent already do.

Purpose of Email Sent to Physician, California, 2007



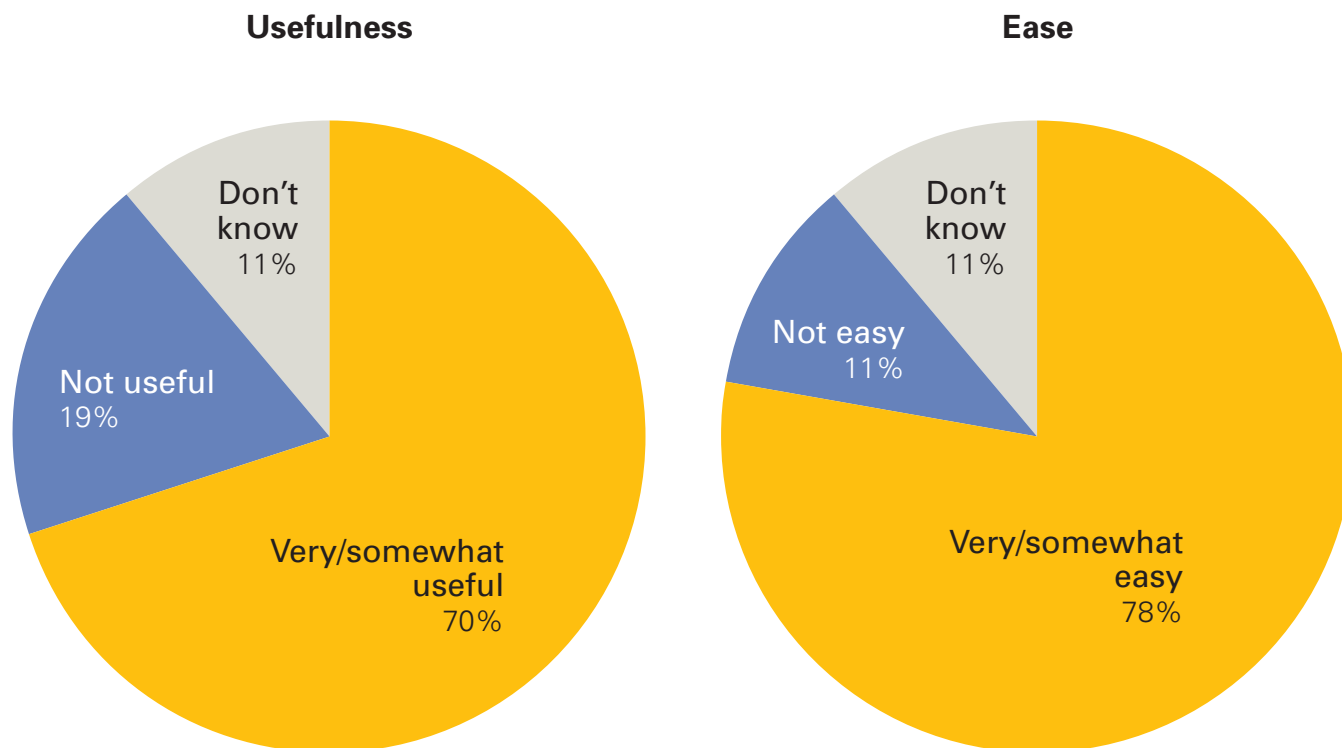
Note: n=44, a small sample.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Communicating with Health Care Providers

Among a small number of consumers who have sent email to their doctor's office, the most frequently cited reasons for doing so were to schedule an appointment and order routine prescription refills.

Usefulness and Ease of Sending Email to Physician, California, 2007



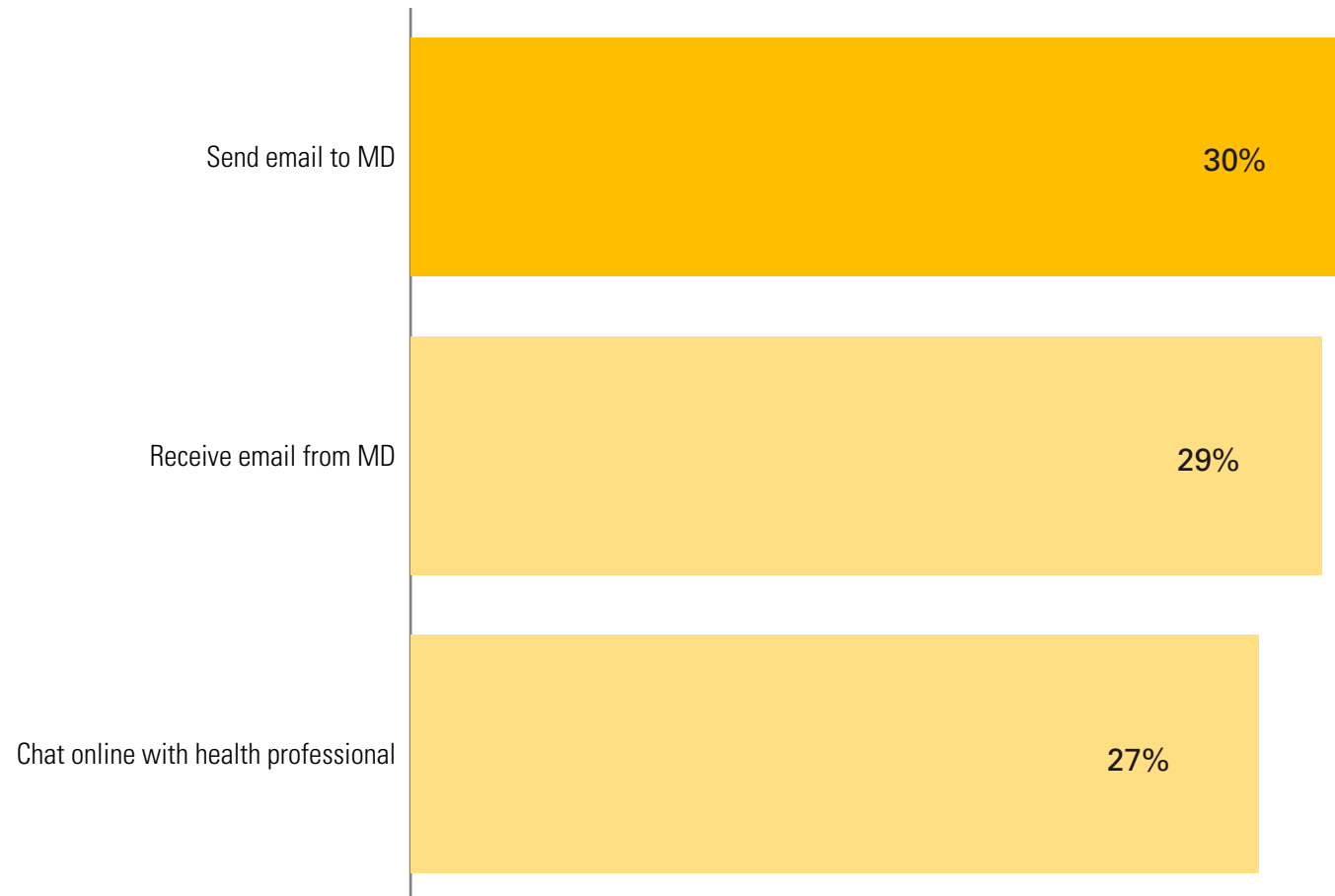
Note: n=44, a small sample.

Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

Communicating with Health Care Providers

Among a small number of consumers who have sent email to their doctor's office, 70 percent said this was very or somewhat useful in helping them manage their health. Seventy-eight percent said it was very or somewhat easy to use.

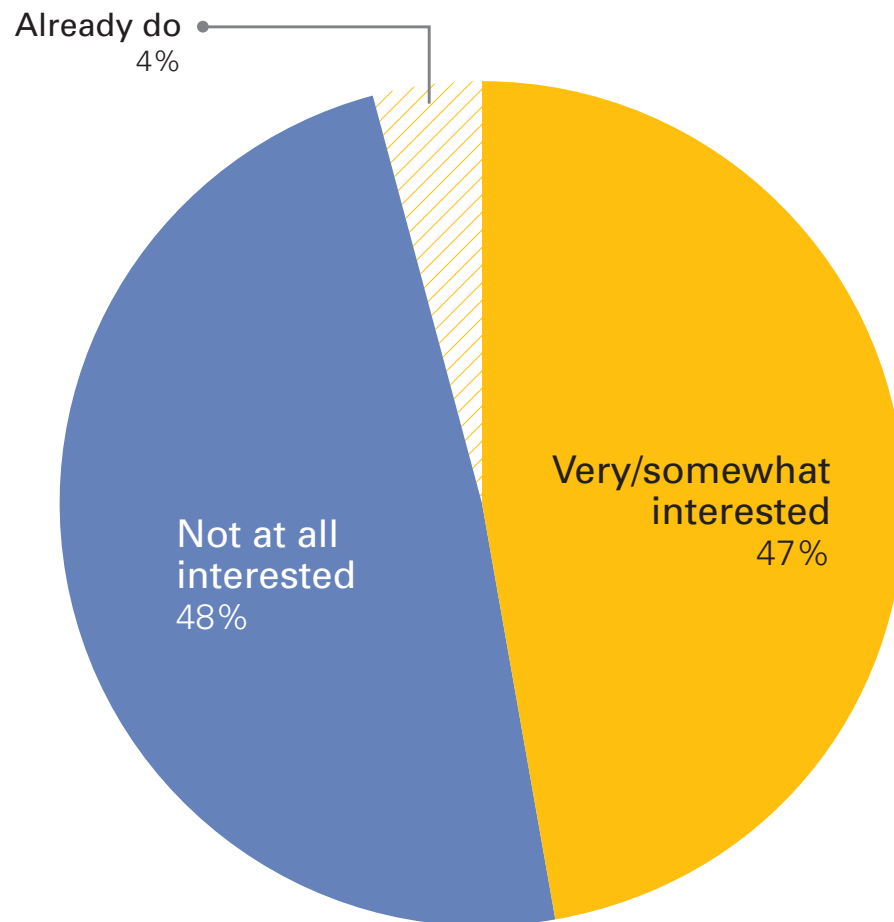
Among Non-Users of Online Communication with a Health Professional, Activities That Elicit Security/Confidentiality Concerns, California, 2007



Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

Among non-users of online communication, sending email to their doctor raises the greatest security or confidentiality concerns.

Interest in Receiving Email From Physician, California, 2007



Note: Pie segments don't add up to 100 percent due to rounding.

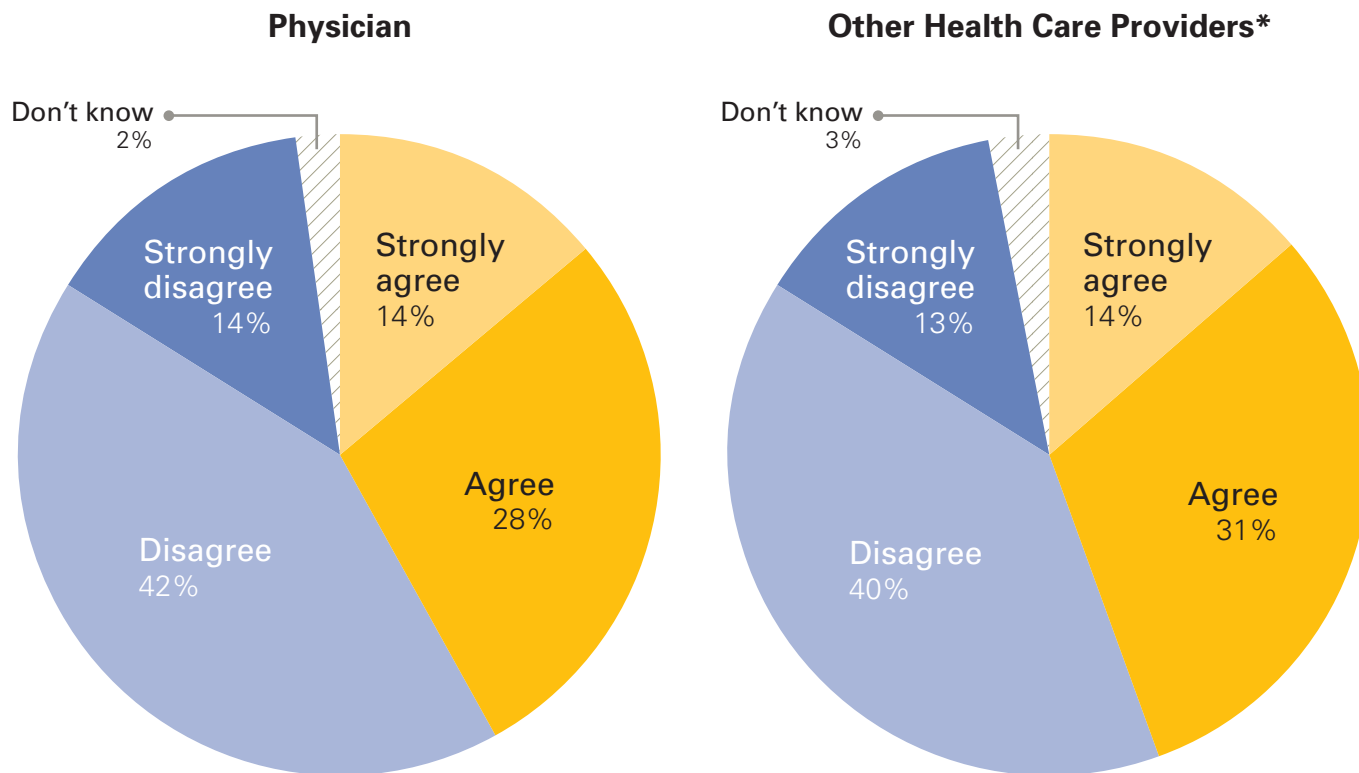
Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Communicating with Health Care Providers

Nearly half of consumers said they were "very or somewhat interested" in receiving email from their doctor's office.

Impact of Internet on Patient Communications With Health Care Providers, California, 2007

"The Internet has improved the way I communicate with..."



*E.g., nurses and pharmacists.

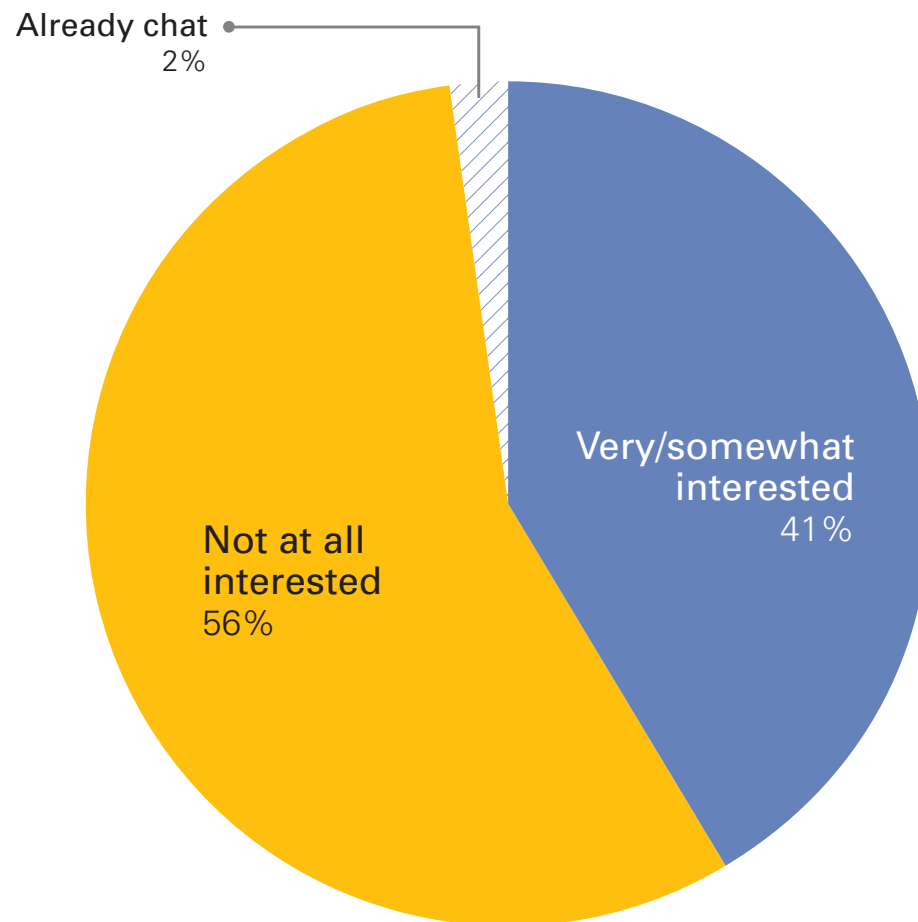
Note: Pie segments on right don't add up to 100 percent due to rounding.

Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

Communicating with Health Care Providers

Forty-two percent of consumers said the Internet has improved communications with their doctor. Forty-five percent said it has improved communications with other health care professionals.

Interest in Chatting Online With a Health Professional, California, 2007



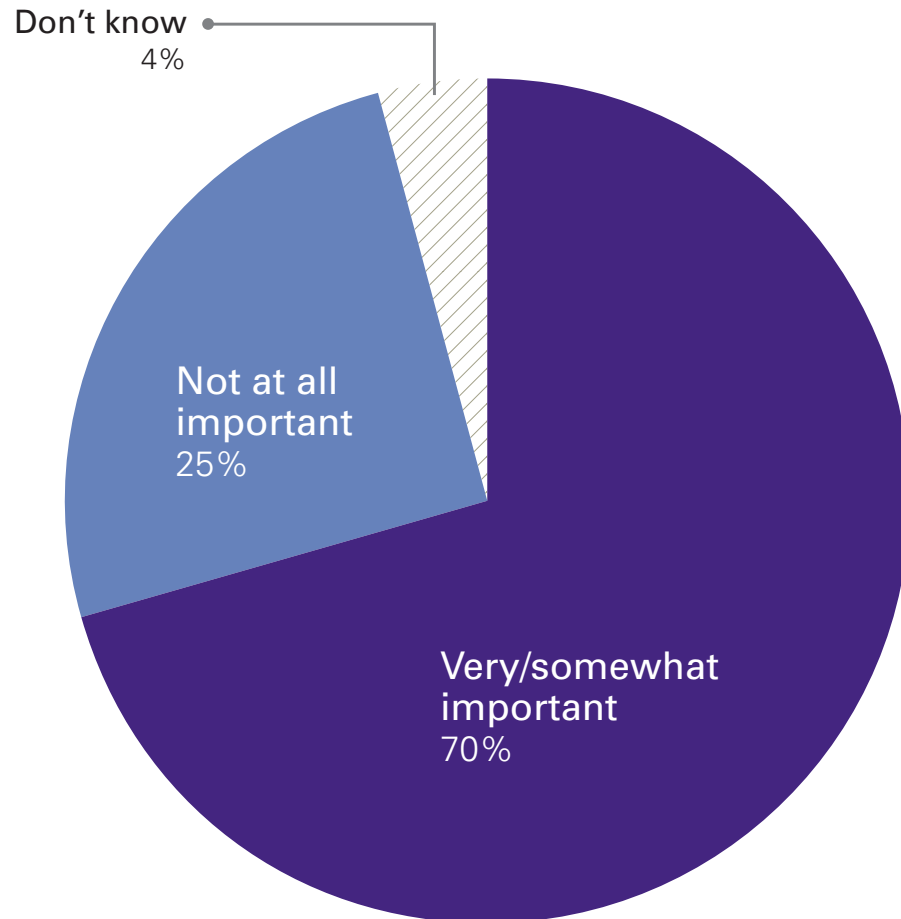
Note: Pie segments don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Communicating with Health Care Providers

Fifty-six percent of consumers said they were “not at all interested” in chatting online in real time with a health professional. Only 2 percent already do.

Importance of Technology in Physician Office, California, 2007



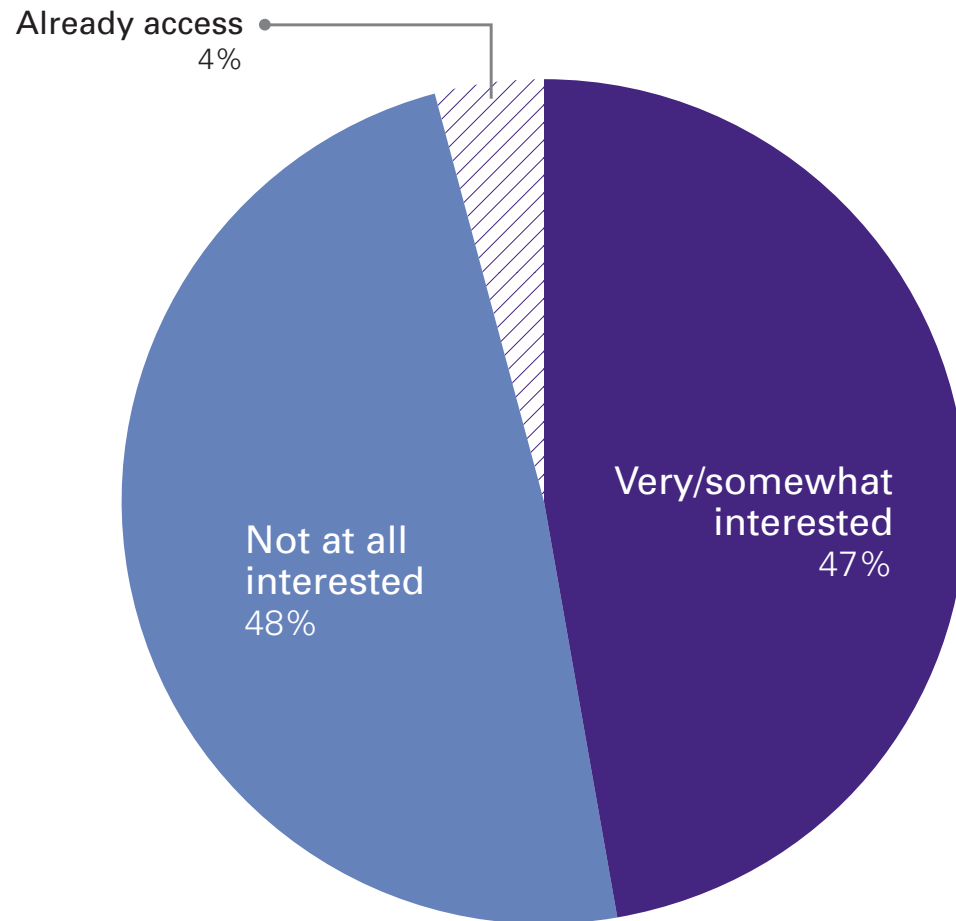
Note: Pie segments don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Technology in Provider Offices

Seventy percent of consumers said that when choosing a physician, it is "very important" that the doctor's office incorporates technology, such as an electronic system to file medical records, into its practice.

Interest in Accessing Lab Test Results Online, California, 2007

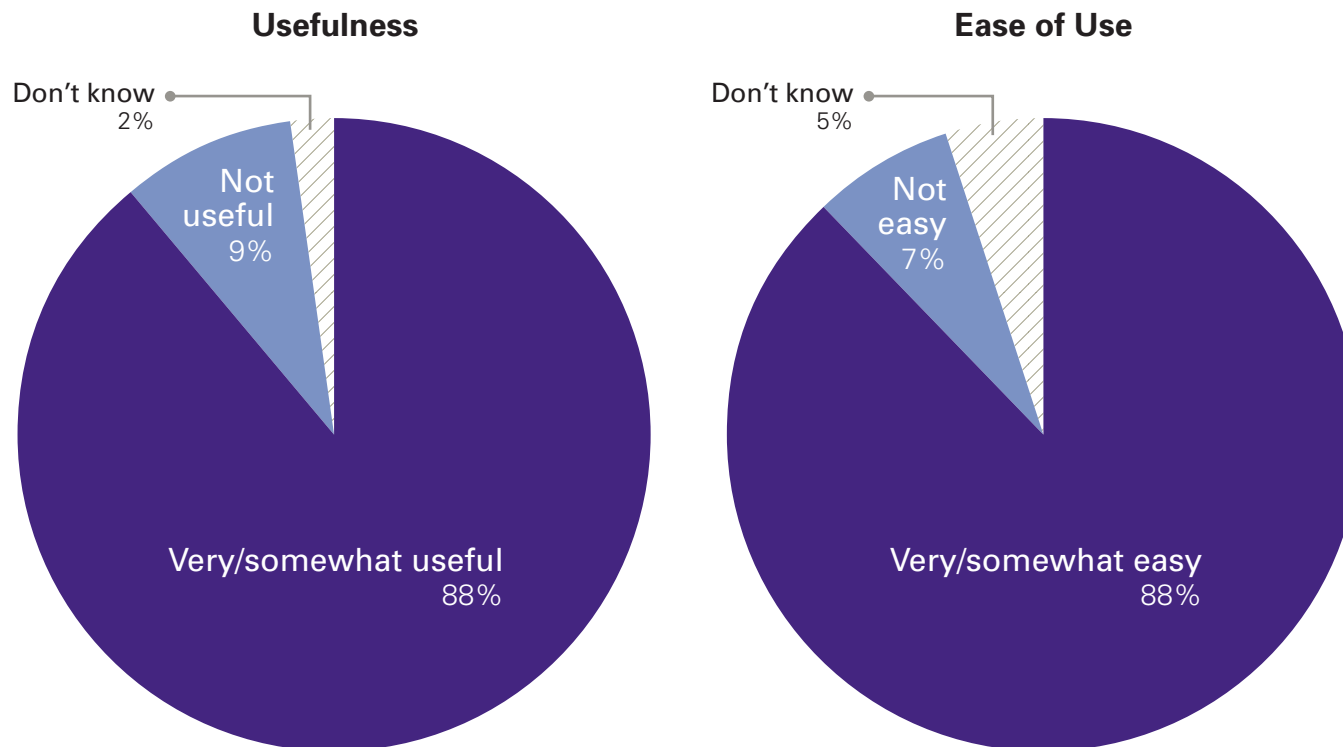


Note: Pie segments don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

About equal numbers of consumers said they were interested or "not at all interested" in accessing lab test results online. Four percent said they already view results this way.

Usefulness and Ease of Use of Online Lab Results, California, 2007



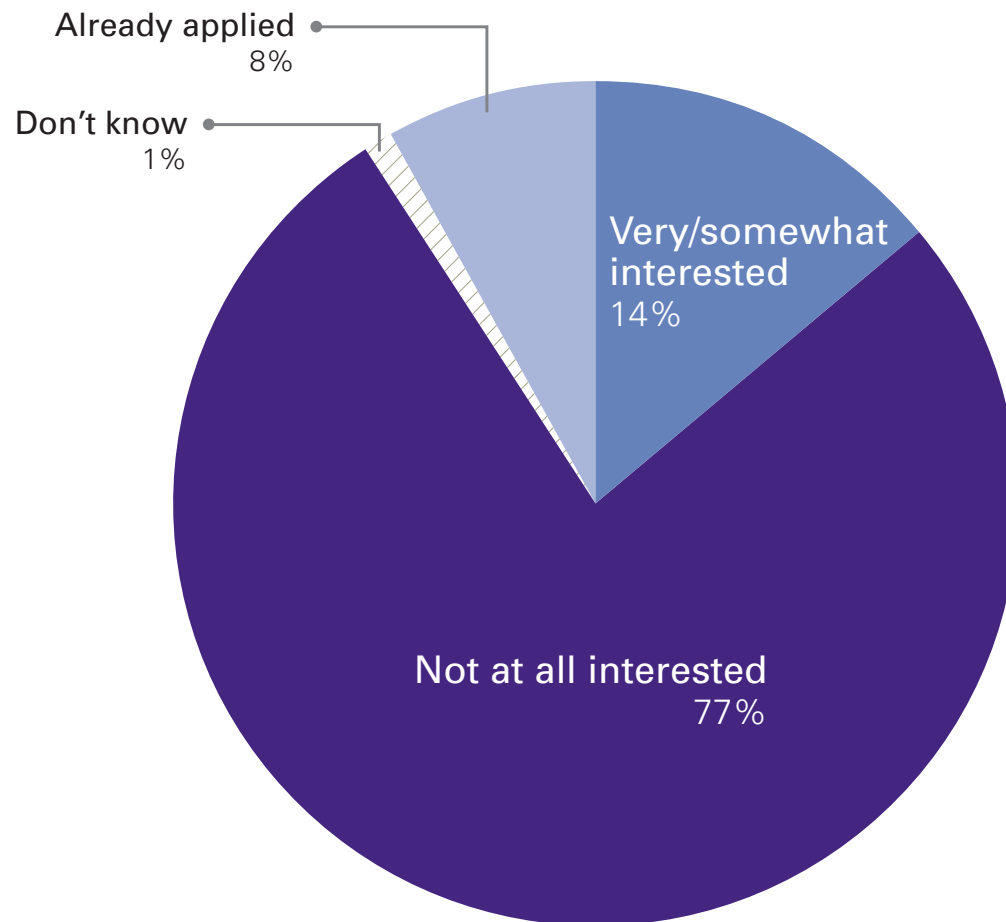
Note: Pie segments on left don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Technology in Provider Offices

Among consumers who have accessed lab test results online, 88 percent said that doing so was useful and easy.

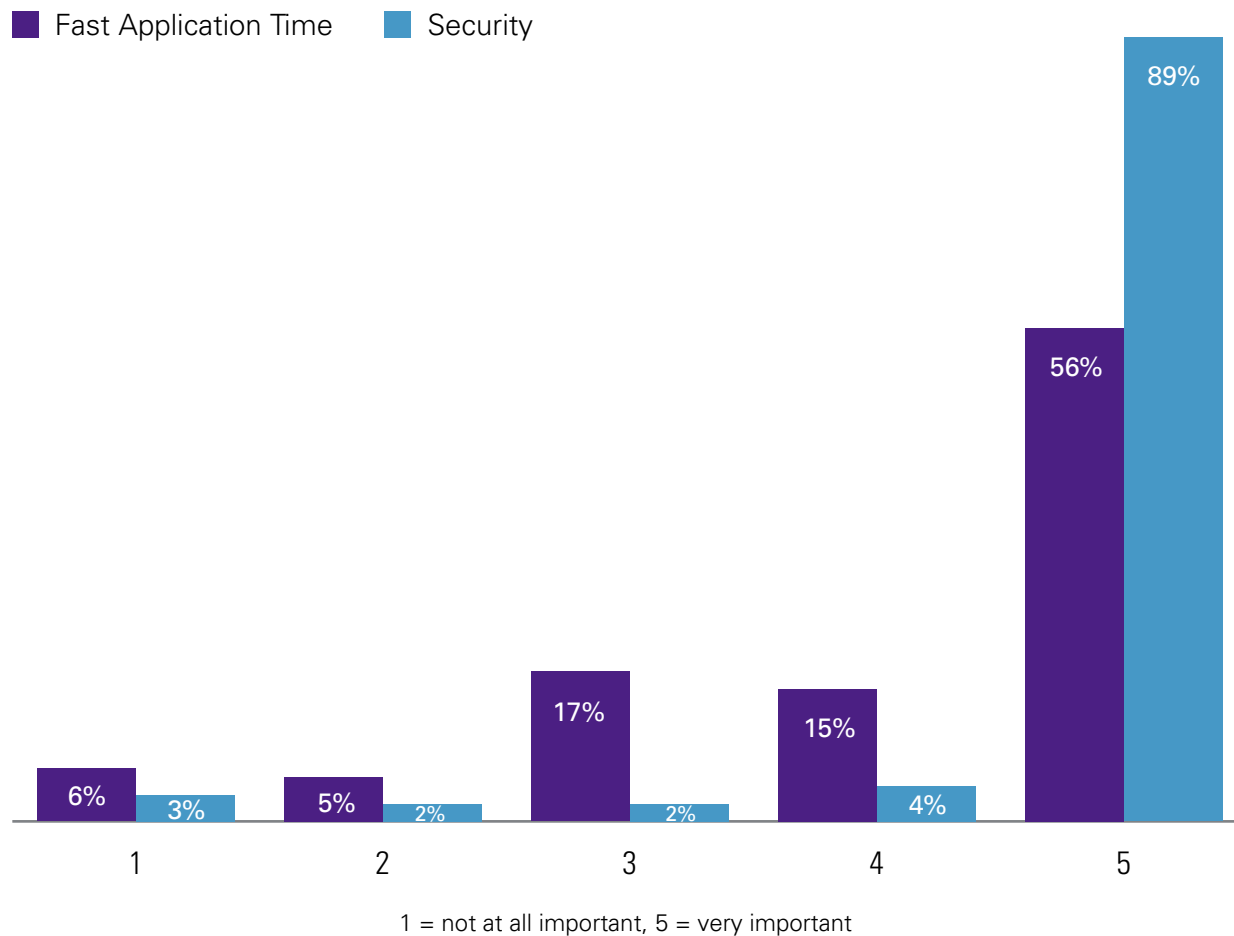
Interest in Applying Online for Health Insurance, California, 2007



Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

More than three-quarters of consumers indicated that, in the last 12 months, they were "not at all interested" in applying for health insurance online. Eight percent have already applied this way.

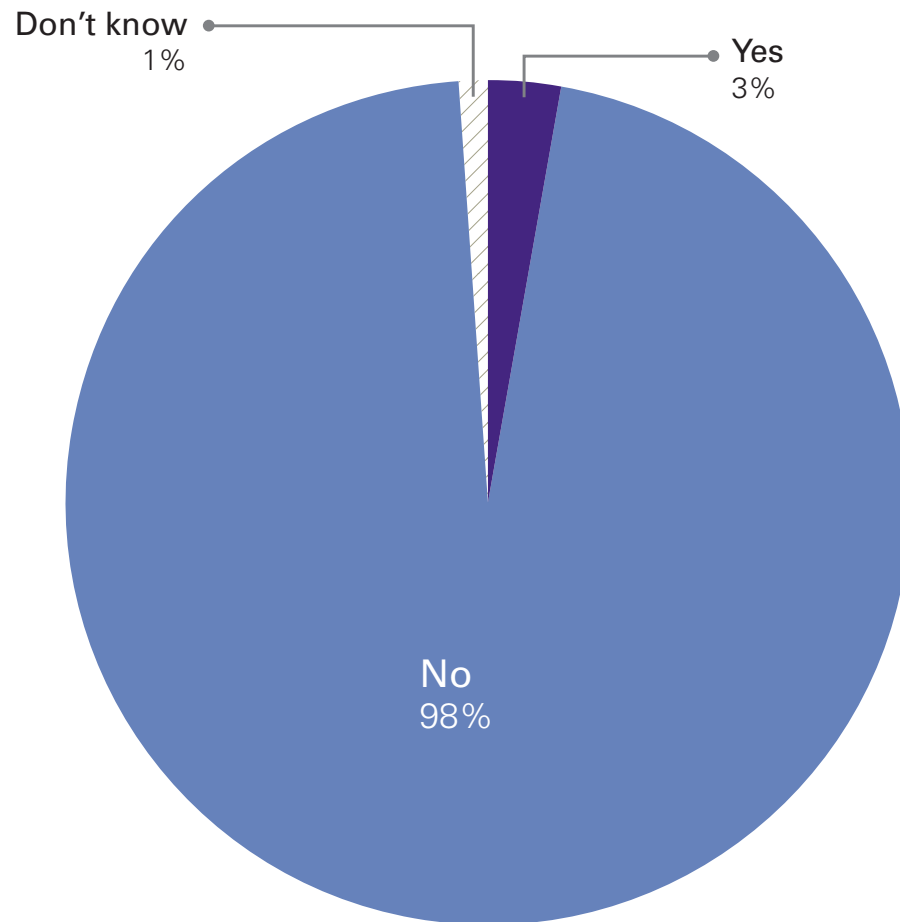
Importance of Fast Application Time and Security When Applying for Health Insurance Online, California, 2007



Source: Custom Study for California HealthCare Foundation. Manhattan Research. 2006/2007.

Among consumers who have applied—or expressed interest in applying—online for health insurance, most indicated that fast application time and security were “very important” features when doing so.

Participation in Telemedicine* Within Last 12 Months, California, 2007



*The use of audio, video, and other telecommunications and electronic information processing technologies to deliver health care services remotely to patients and enable consultations among health care providers.

Note: Pie segments on left don't add up to 100 percent due to rounding.

Source: *Custom Study for California HealthCare Foundation*. Manhattan Research. 2006/2007.

Technology in Provider Offices

Only 3 percent of consumers reported that they participated in a telemedicine session with a health care provider in the last year.

Source, Survey Demographics, and Methodology

Manhattan Research, which focuses on the health care market, surveyed 601 California adults (ages 18 and older) on behalf of the California HealthCare Foundation between August and September 2007. Manhattan aggregated these data with 407 responses obtained from its 2006 CyberCitizen® Health survey, for a total sample of 1,008.

ABOUT THE SURVEY POPULATION:

- **Average age:** 46 years. The largest age categories were 45 to 54 years (26 percent) and 25 to 34 years (24 percent).
- **Gender:** There were equal numbers of male and female respondents.
- **Employment status:** Employed/self-employed full time (46 percent), retired (23 percent), employed/self-employed part time (11 percent), homemaker (8 percent), full-time student (4 percent), unemployed/laid off (5 percent), and other (2 percent).
- **Annual household income:** Ranged from less than \$20,000 to more than \$150,000. The largest income categories were \$50,000 to \$74,000 (17 percent), \$75,000 to \$99,000 (12 percent), less than \$20,000 (12 percent), and \$100,000 to \$149,000 (11 percent).
- **Education:** The largest number of respondents (27 percent) had a high school diploma, followed by those with some college (24 percent) or a college degree (22 percent).
- **National origin:** 20 percent of respondents were born outside of the United States.

The survey entailed an in-depth, random-digit-dial telephone interview. Manhattan told participants it was researching their use of the Internet and other communication tools. It weighted the data for—and benchmarked them to—age, gender, education, and region using normative data from the latest U.S. census. The survey data are representative of both online and offline adults.

Appendix

GIVE US YOUR FEEDBACK

Was the information provided in this report of value? Are there additional kinds of information or data you would like to see included in future reports of this type? Is there other research in this subject area you would like to see? We would like to know.



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Thank you.

FOR MORE INFORMATION



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