

Ethics Survey of Consumer Attitudes About Health Web Sites

Sponsored by

**The California Healthcare Foundation
and The Internet Healthcare Coalition**

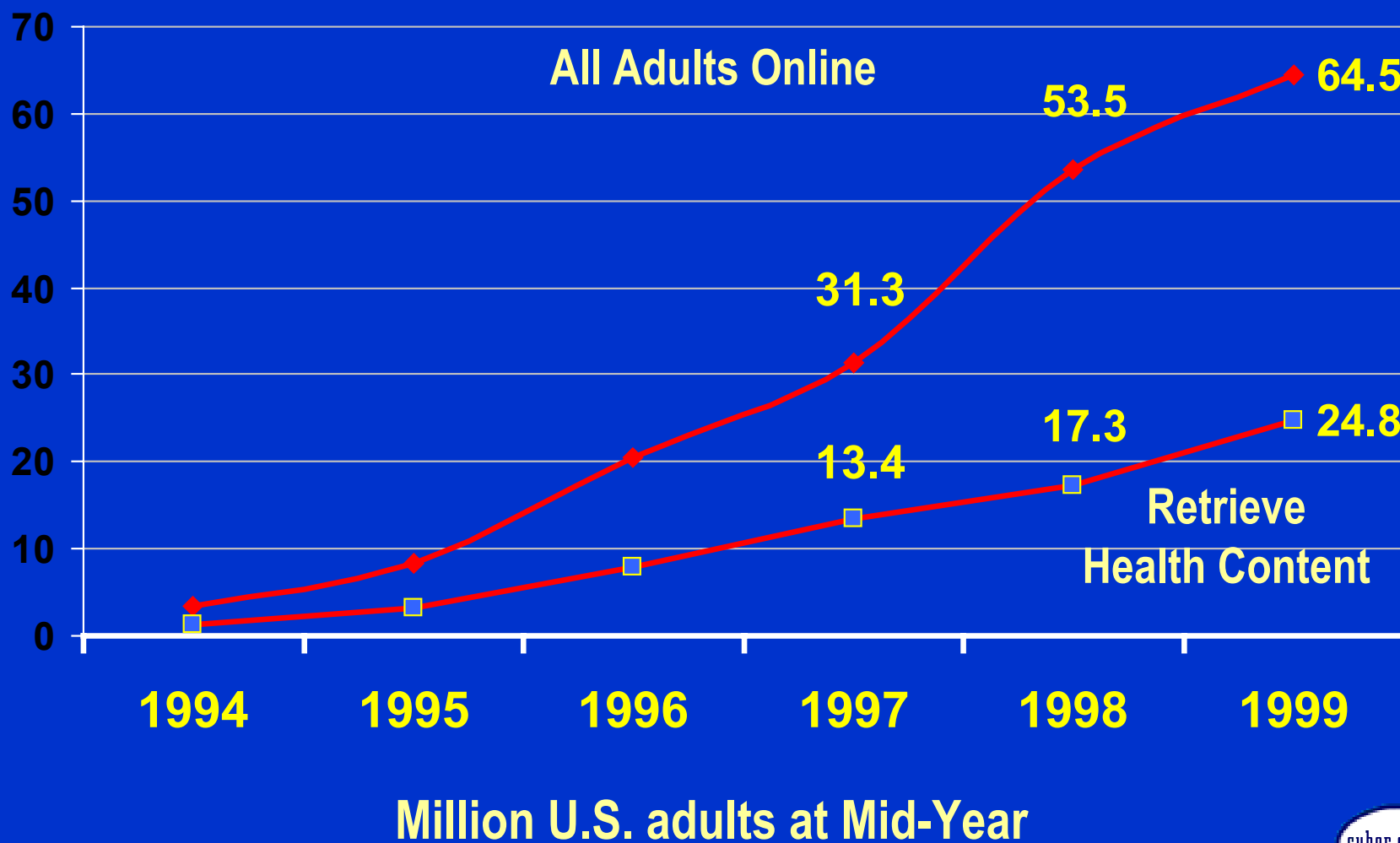
Conducted by **Cyber Dialogue**

in cooperation with **The Institute for the Future**

**National Press Club
Washington, D.C.
January 27, 2000**

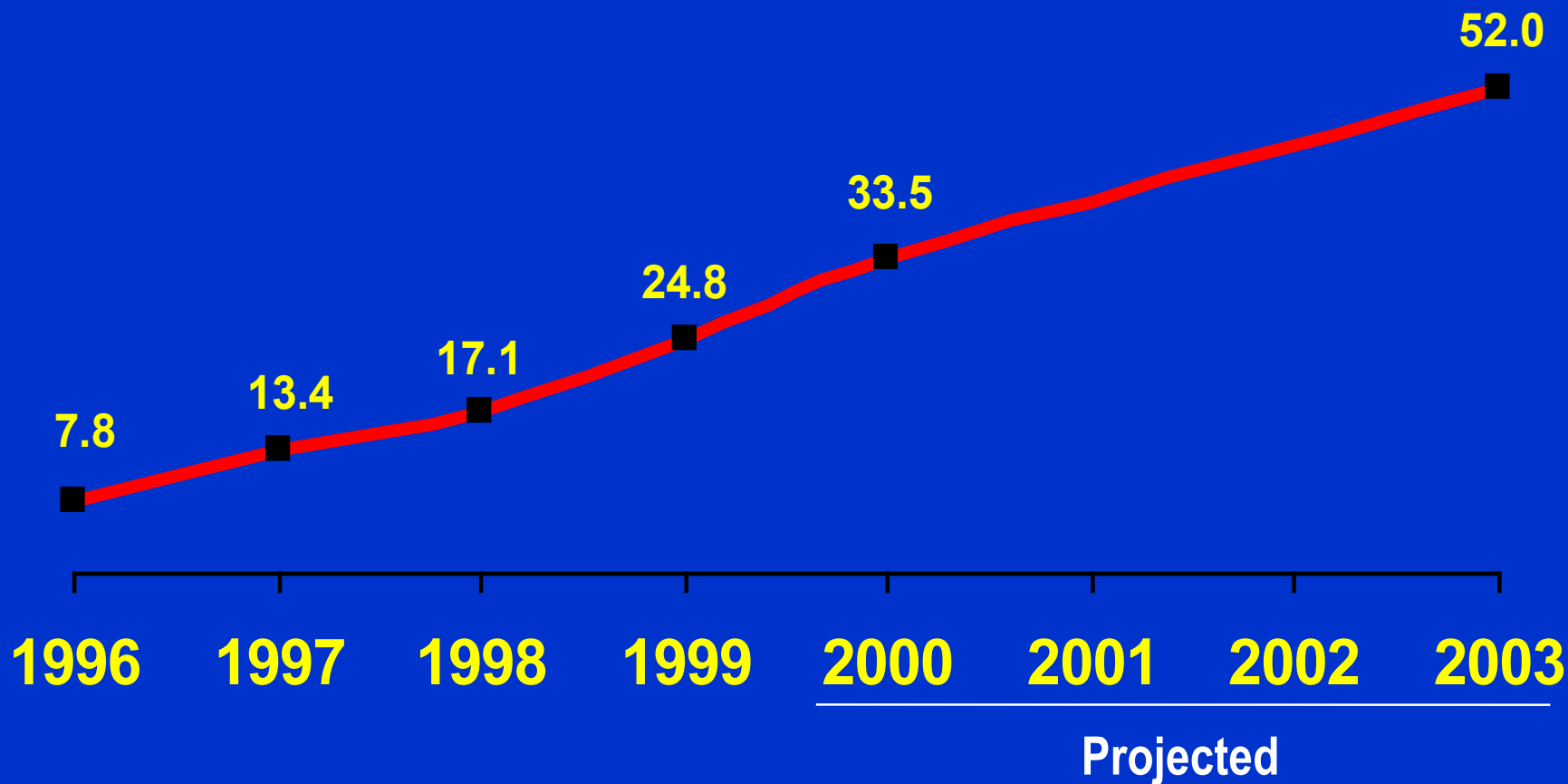


Overview of Internet usage trends



Internet user growth outlook

Millions of U.S. adults seeking health information

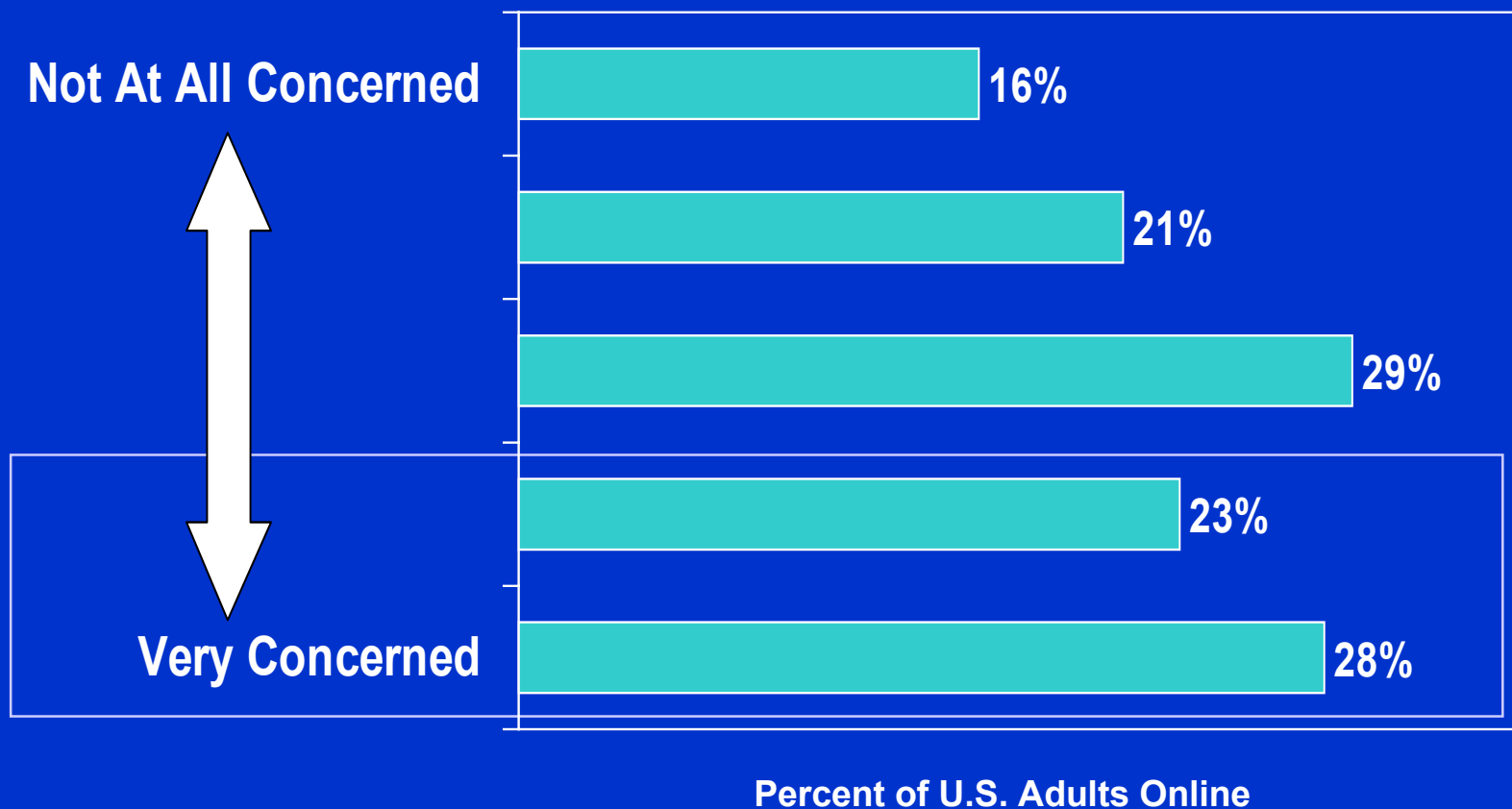


Topline Survey Results

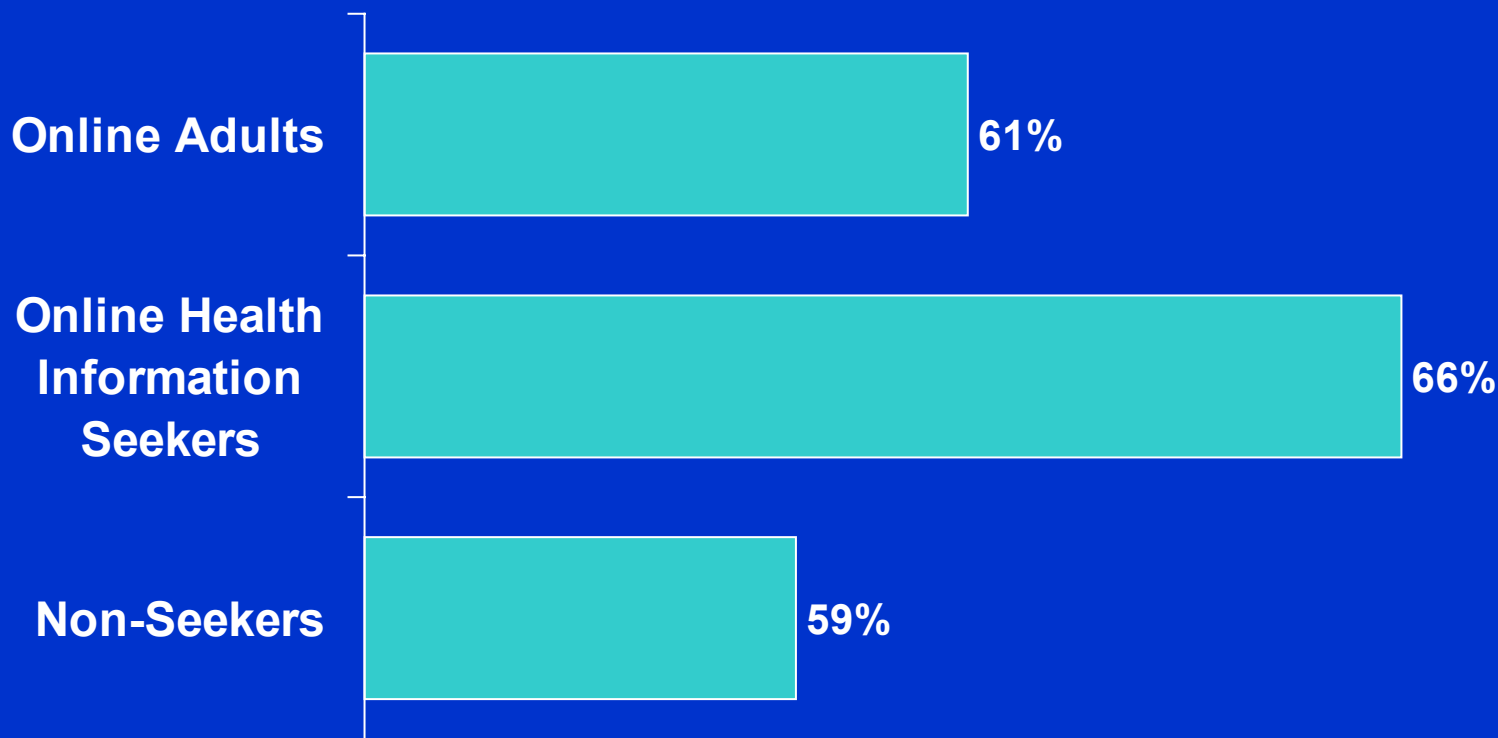
The average American Internet user is:

- concerned about the privacy of online health information
- suspicious of the ethics of many Internet health Web sites
- uncertain whether personal health data are protected by law
- confused about who should regulate Internet health information, or if it should be regulated at all

Half of all online adults are concerned about potential invasion of the privacy of personal health information in the U.S.



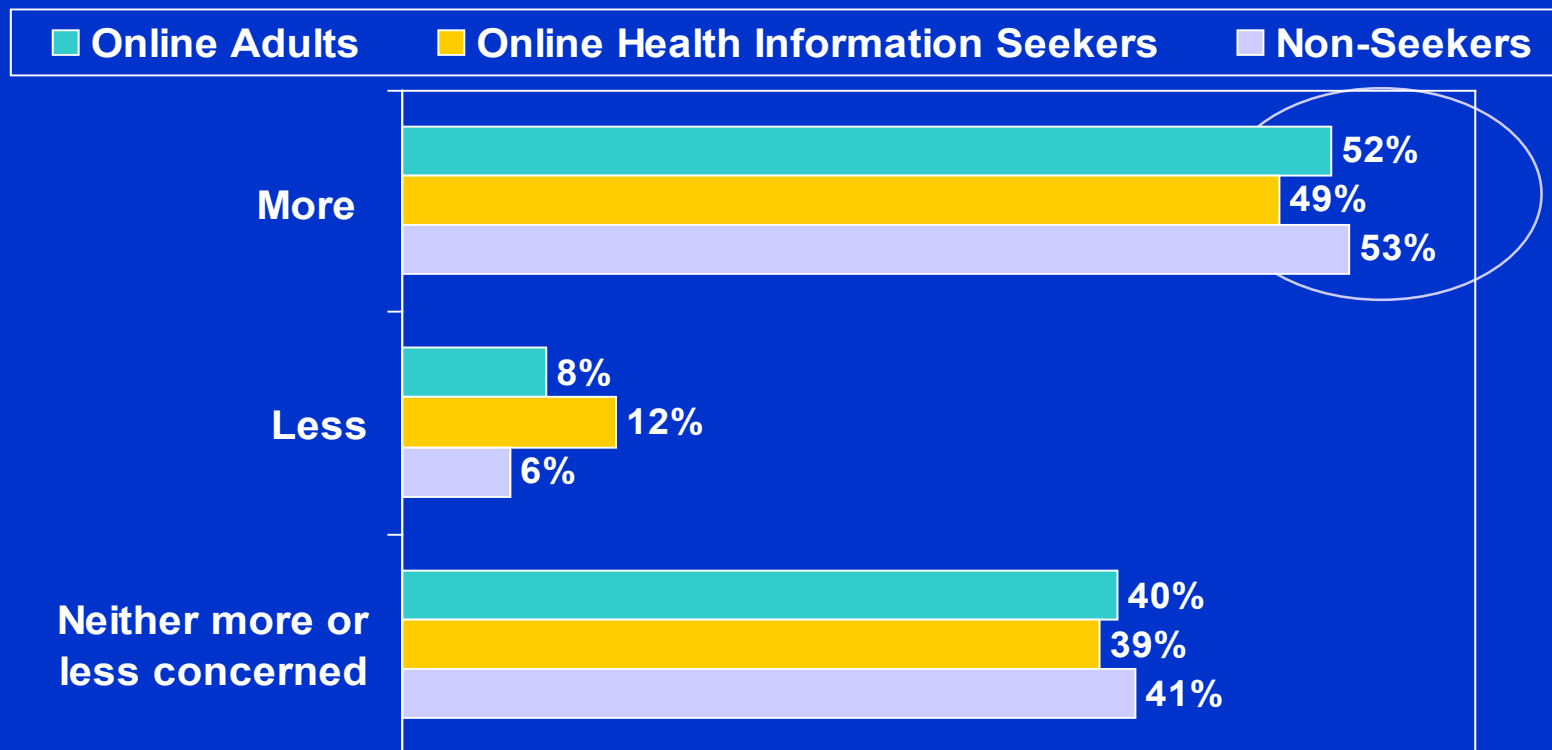
Internet users are concerned about privacy issues both online and offline



Concerned/Very Concerned about Potential Invasion of Personal Privacy in the U.S. in General



Internet users are concerned about privacy issues both online and offline



More or Less Concerned About Personal Privacy on the Internet vs. Personal Privacy in General?

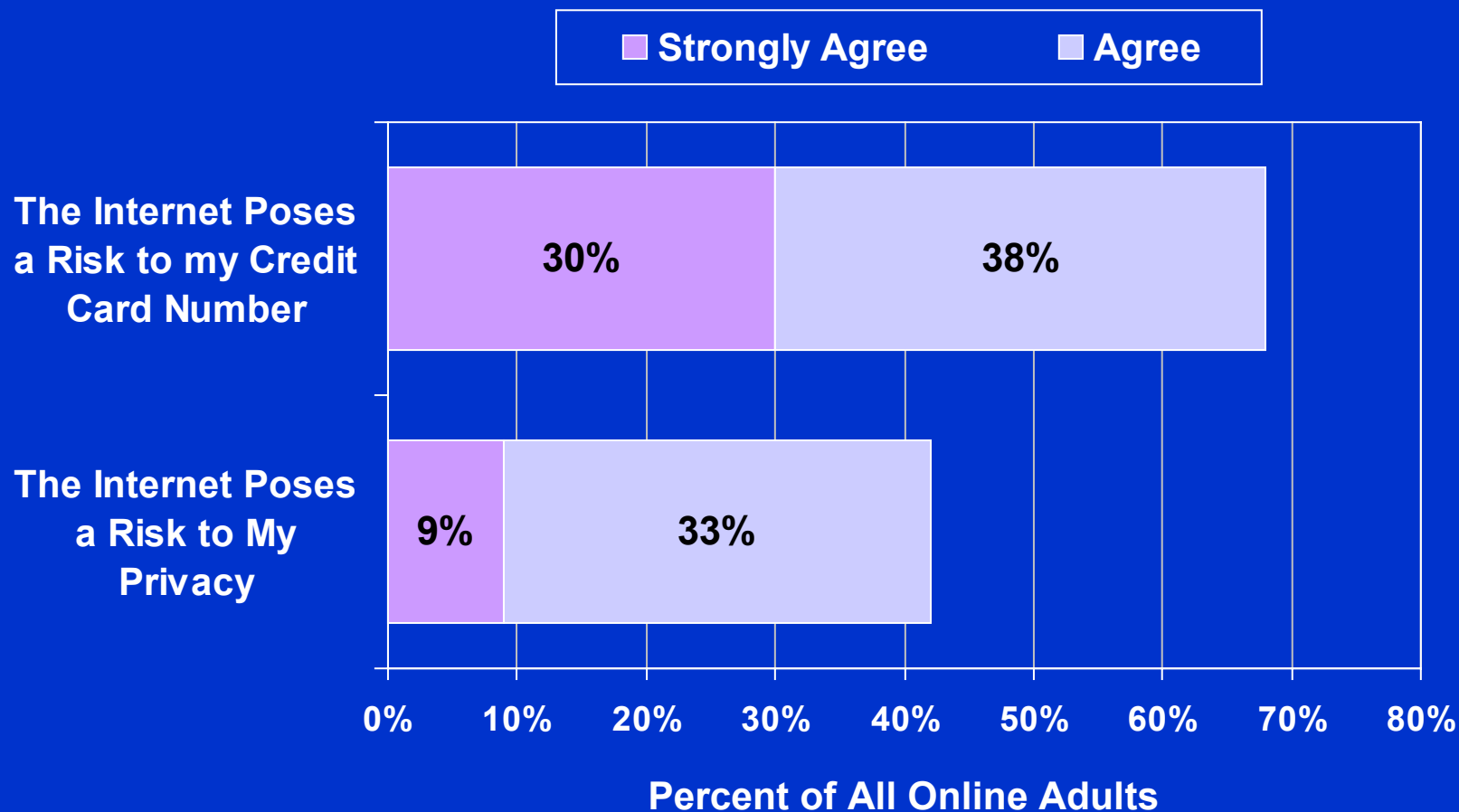
Three main health privacy issues concern online users



Online Adults Rating Each Issue 4 or 5 on 5 Pt. Scale
Where 5 = Very Concerned

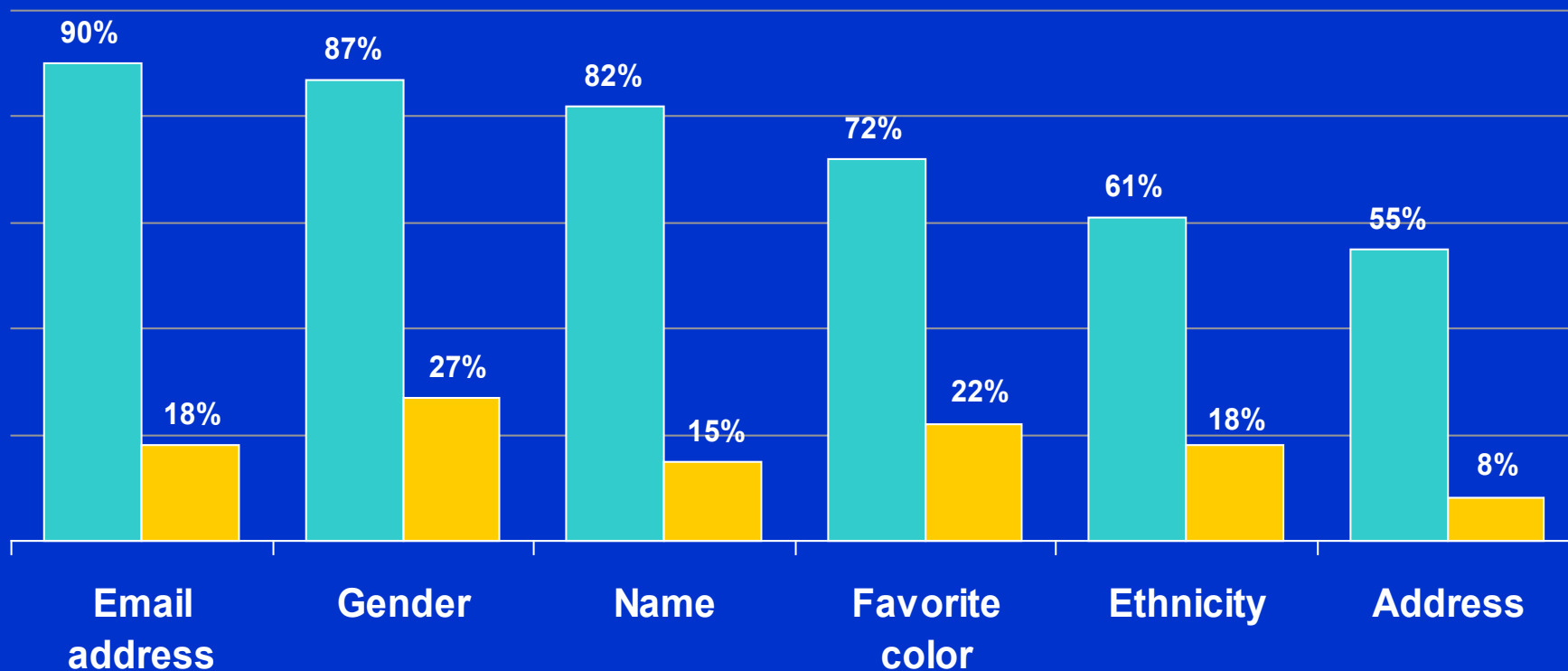


Perceived risks of the Internet with regard to general privacy vs. credit cards



Site registration information online users are willing to share

■ In exchange for more personalized service
■ With other sites, companies & advertisers

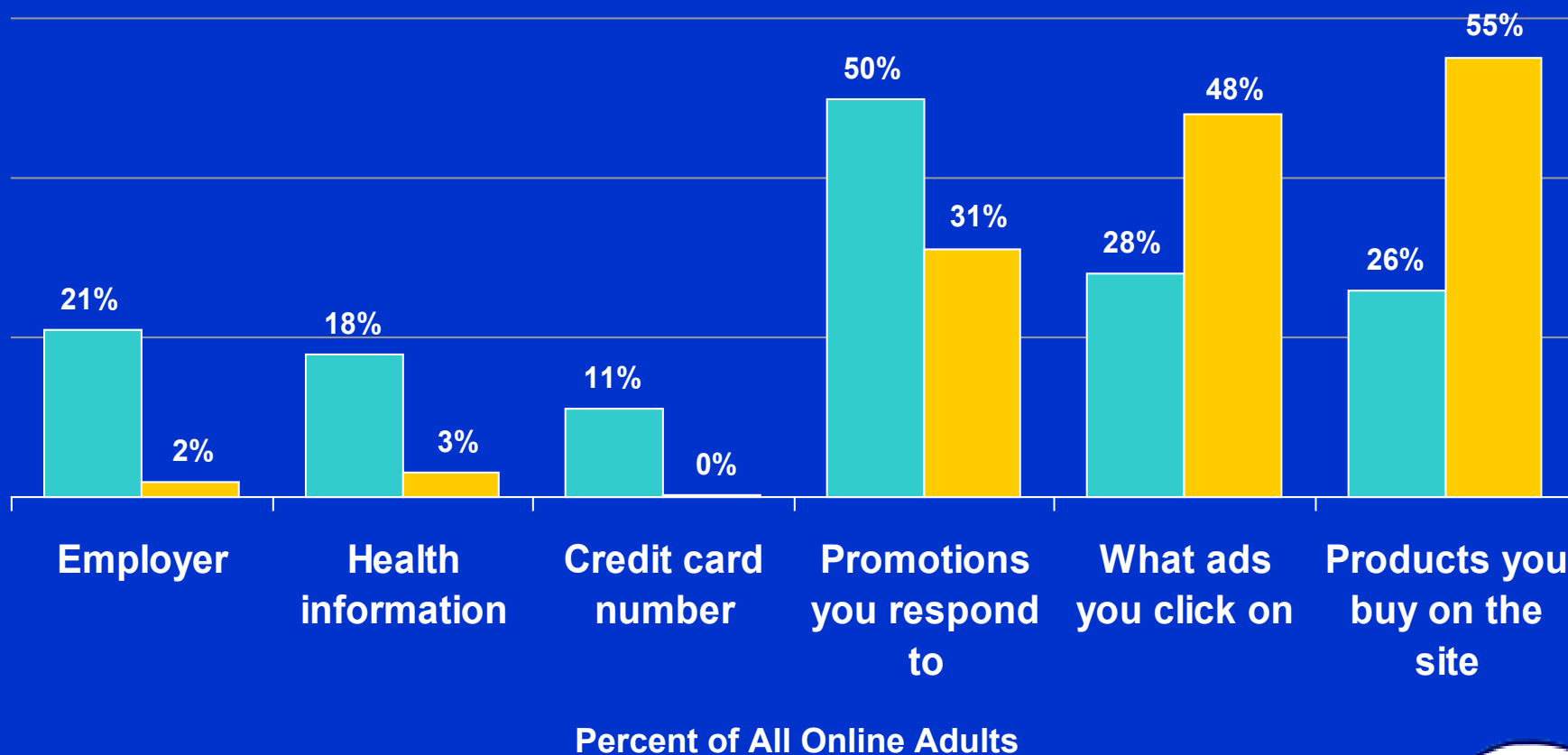


Percent of All Online Adults

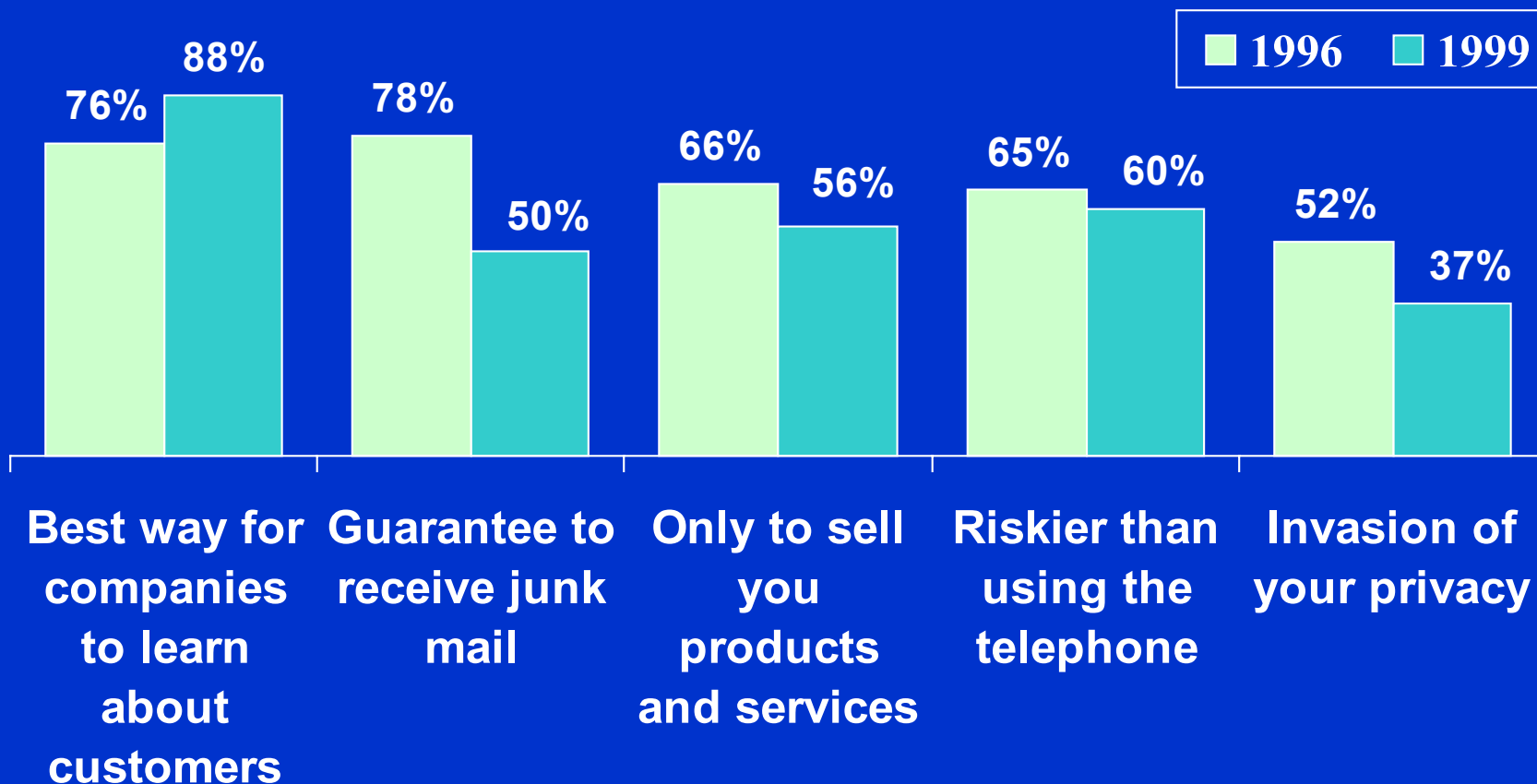


Users make a huge distinction between sharing deeply personal information and sharing shopping data

■ In exchange for more personalized service
■ With other sites, companies & advertisers



Submitting Personal Information Online Is . . .



Percent of All Online Adults

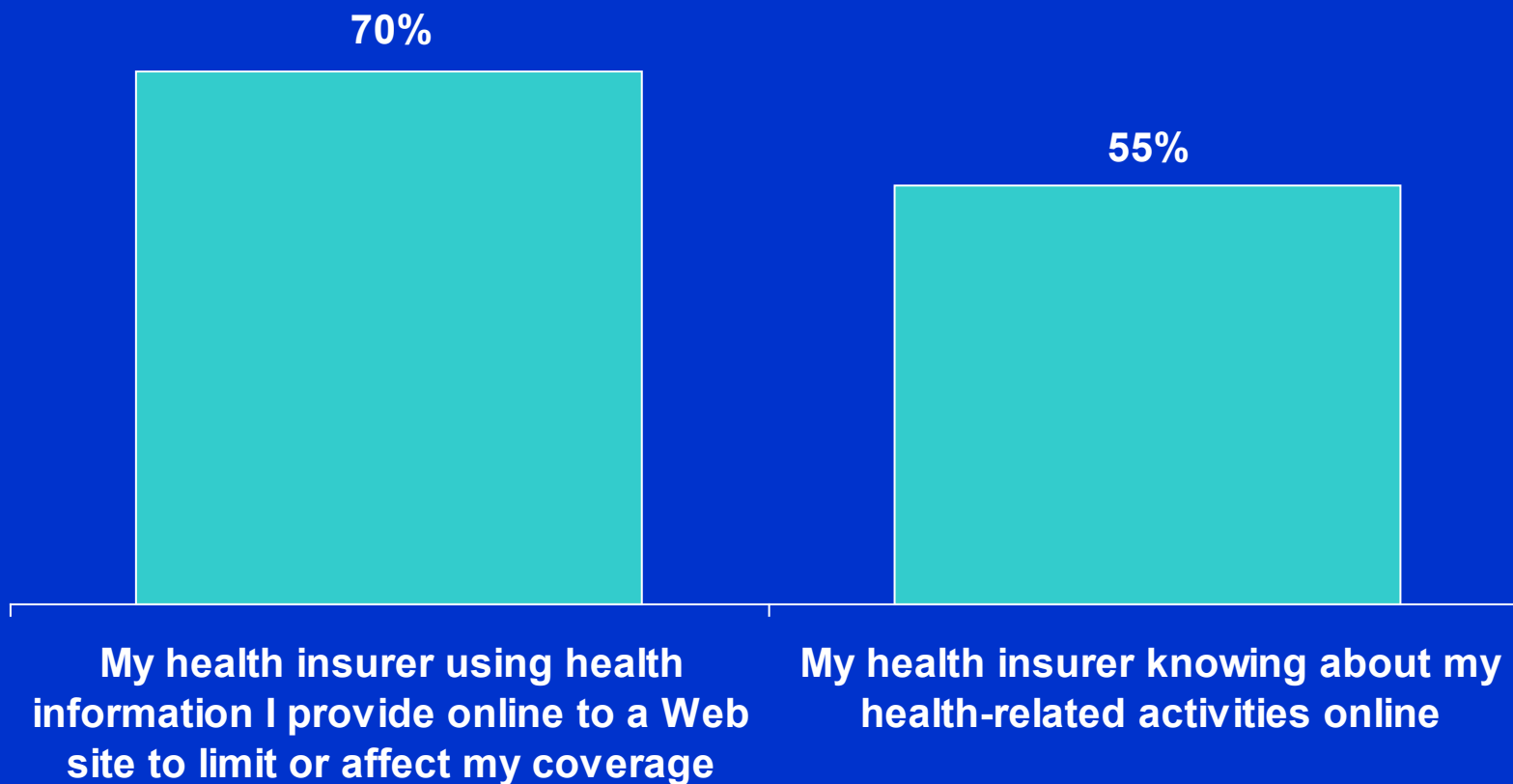


Divergent Opinions About Specific Online Offerings:

	Would Do	Would Not Do Because of Concern
Access the latest disease specific research/news	56%	3%
Purchase a health product other than a prescription	53%	12%
Seek advice online regarding a specific medical condition from other online patients	51%	18%
Use of a secure website	48%	17%
Have password-protected Internet access to my medical file in my doctor's office	47%	33%
Purchase or refill prescription drugs online	45%	25%
Register at a health-related Web site	43%	16%
Allow my doctors to have access to my personal medical record online	42%	40%
Access my personal medical record online	38%	40%
Sign-up or purchase health insurance online	37%	27%
Personalize a health information site by selecting information to have updated whenever you visit the site	37%	26%
Participate in a health-chat room	36%	15%

Percent of All Online Adults

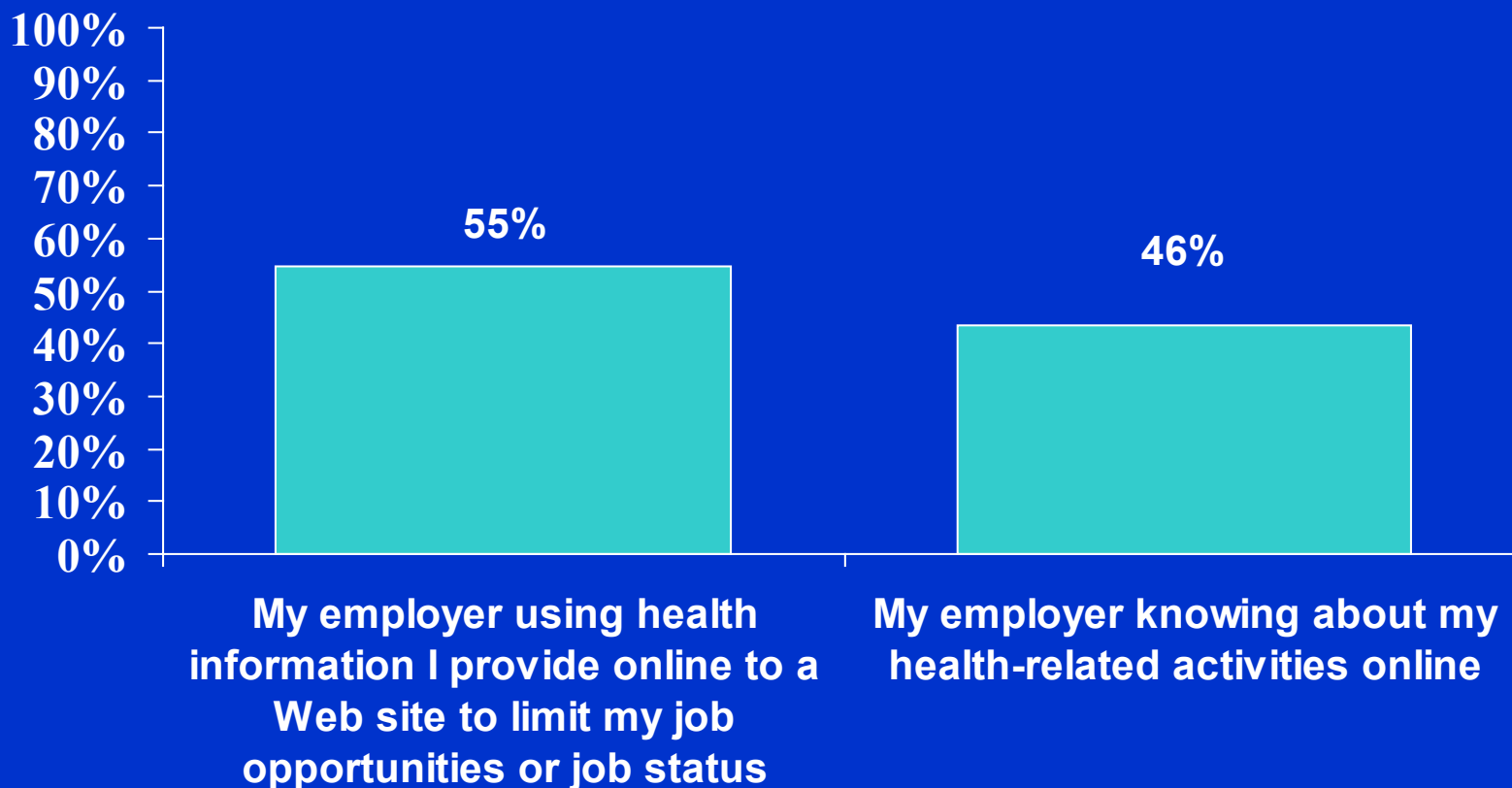
Online health seekers are very concerned about health information they provide online being used by insurers



**Percent of Health Information Seekers
Rating Each Issue 4 or 5 on 5 Pt. Scale Where 5 = Very Concerned**



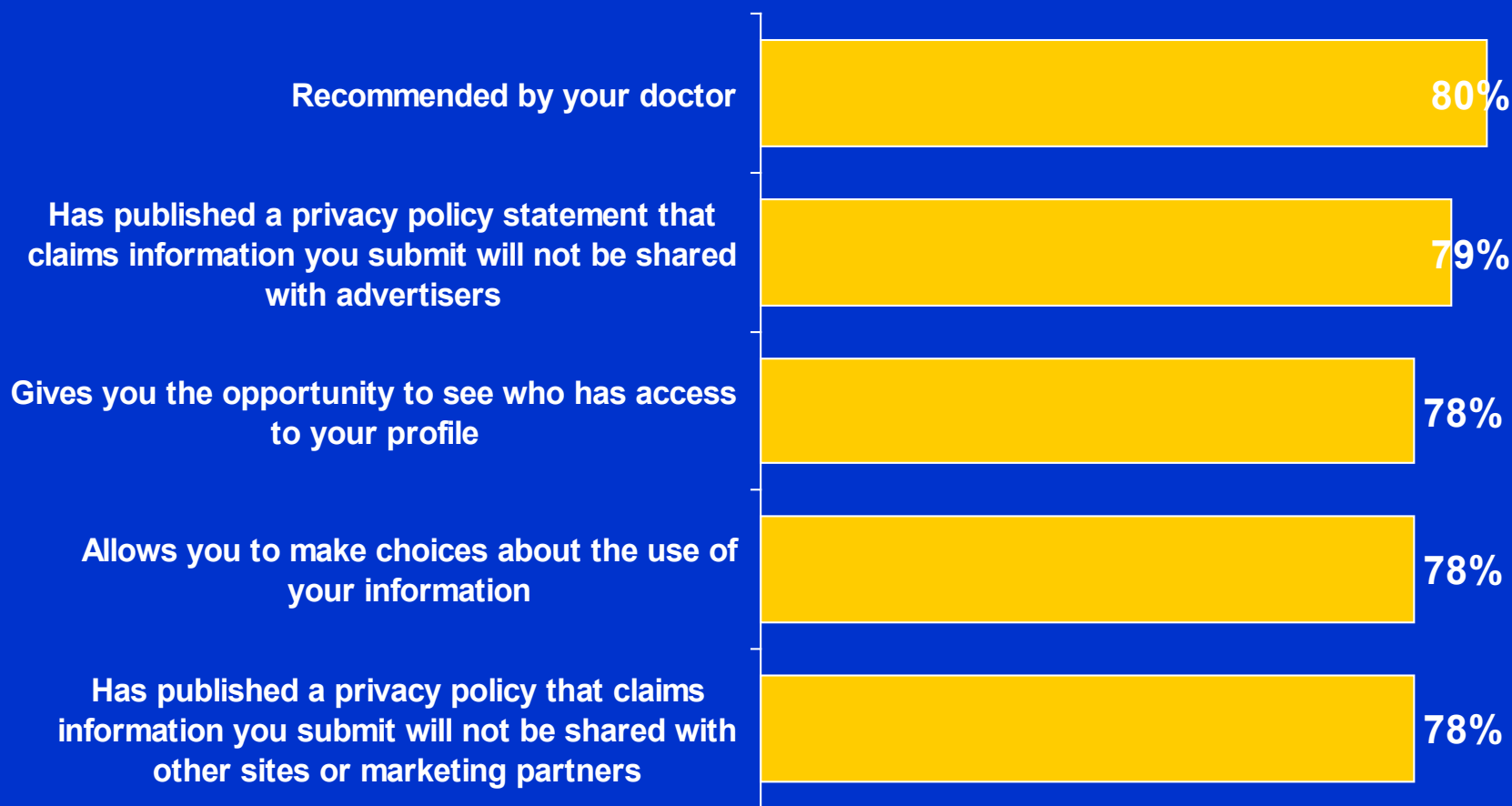
Online health seekers are also very concerned about health information they provide online being used by employers



**Percent of Health Information Seekers
Rating Each Issue 4 or 5 on 5 Pt. Scale Where 5 = Very Concerned**



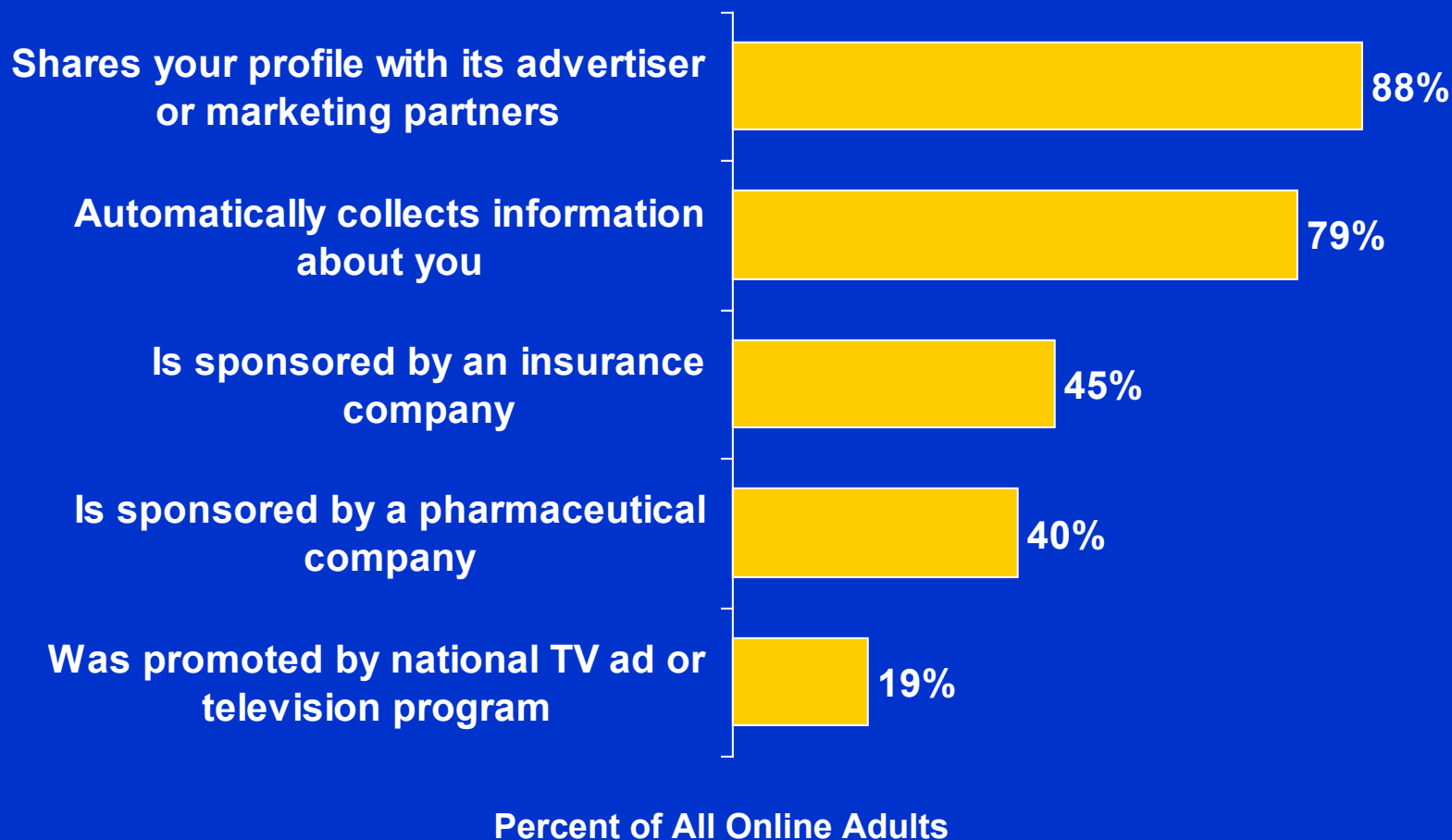
Positive influences on willingness to share information with a health site



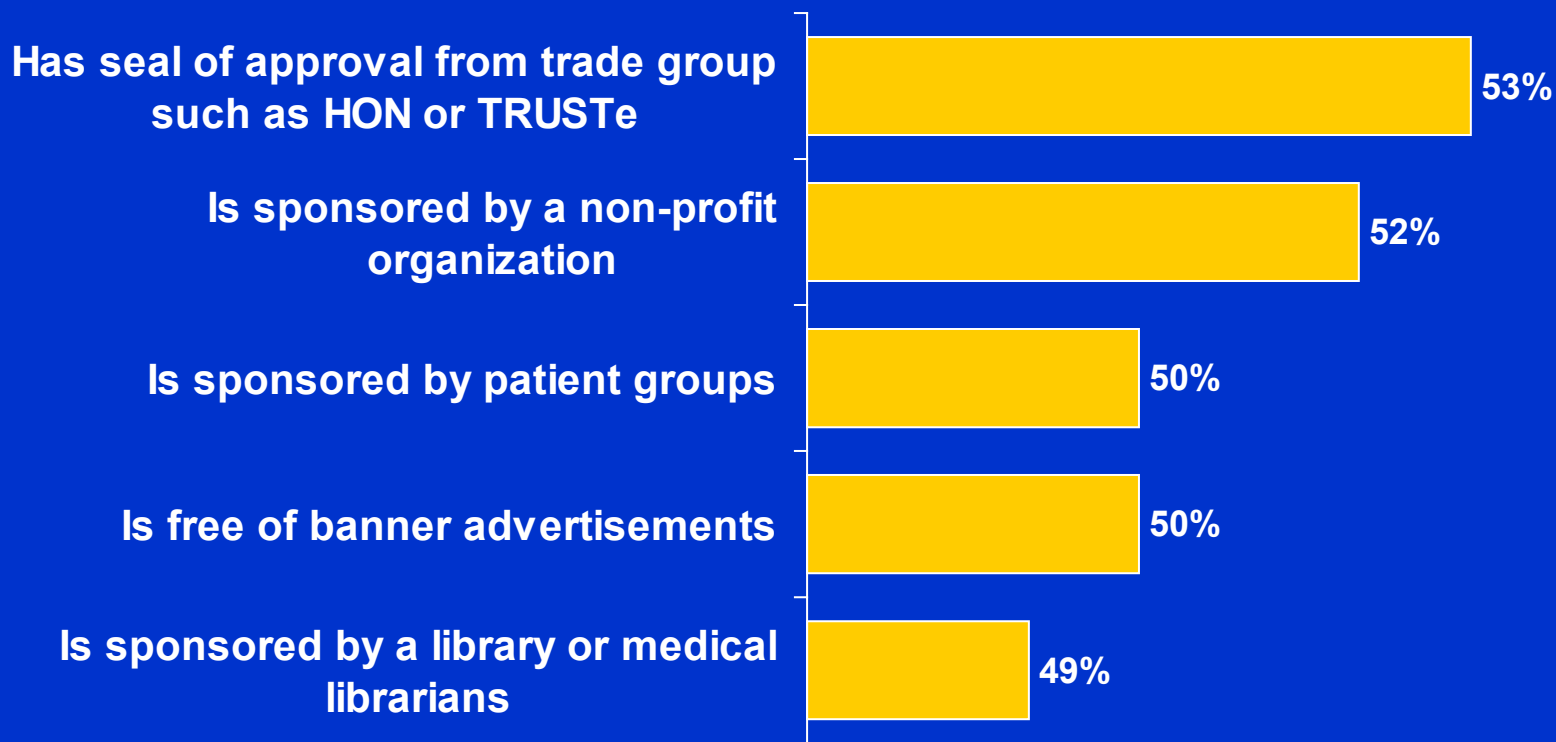
Percent of All Online Adults



Negative influences on willingness to share information with a health site



Characteristics with no impact on willingness to share information with a health site

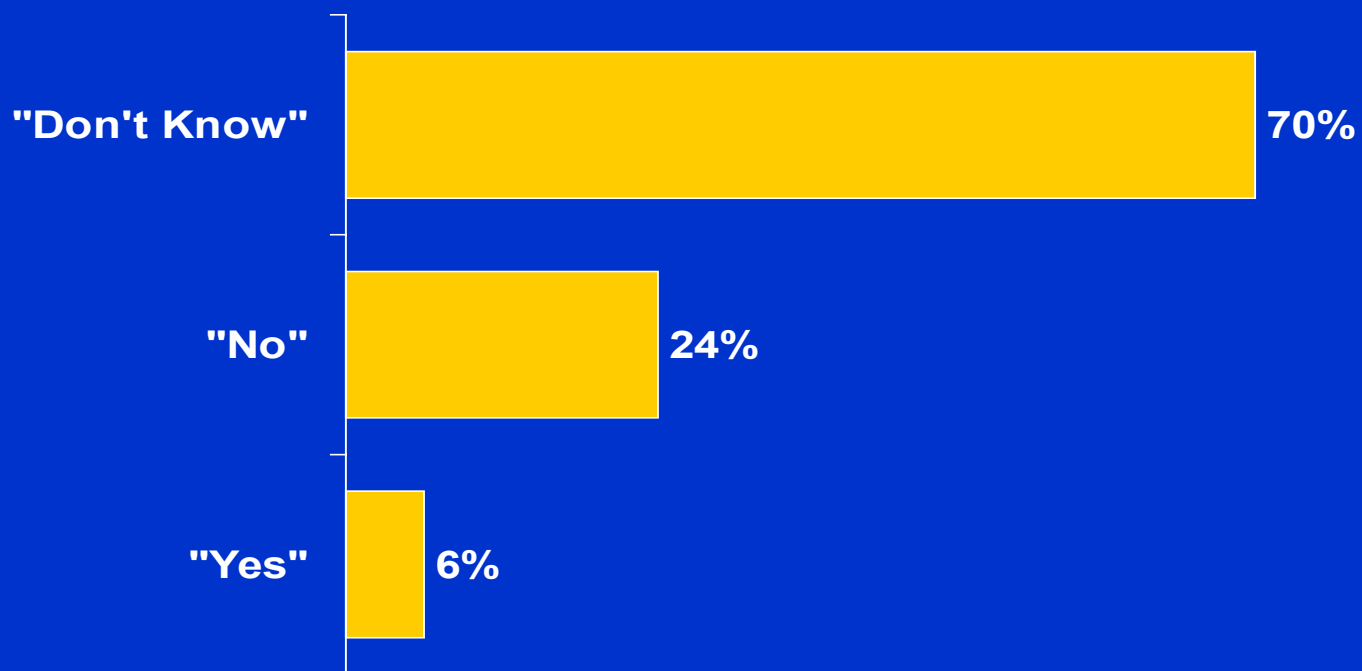


Percent of All Online Adults



Awareness of Laws Protecting Privacy/Confidentiality of Personal Medical Info on the Internet

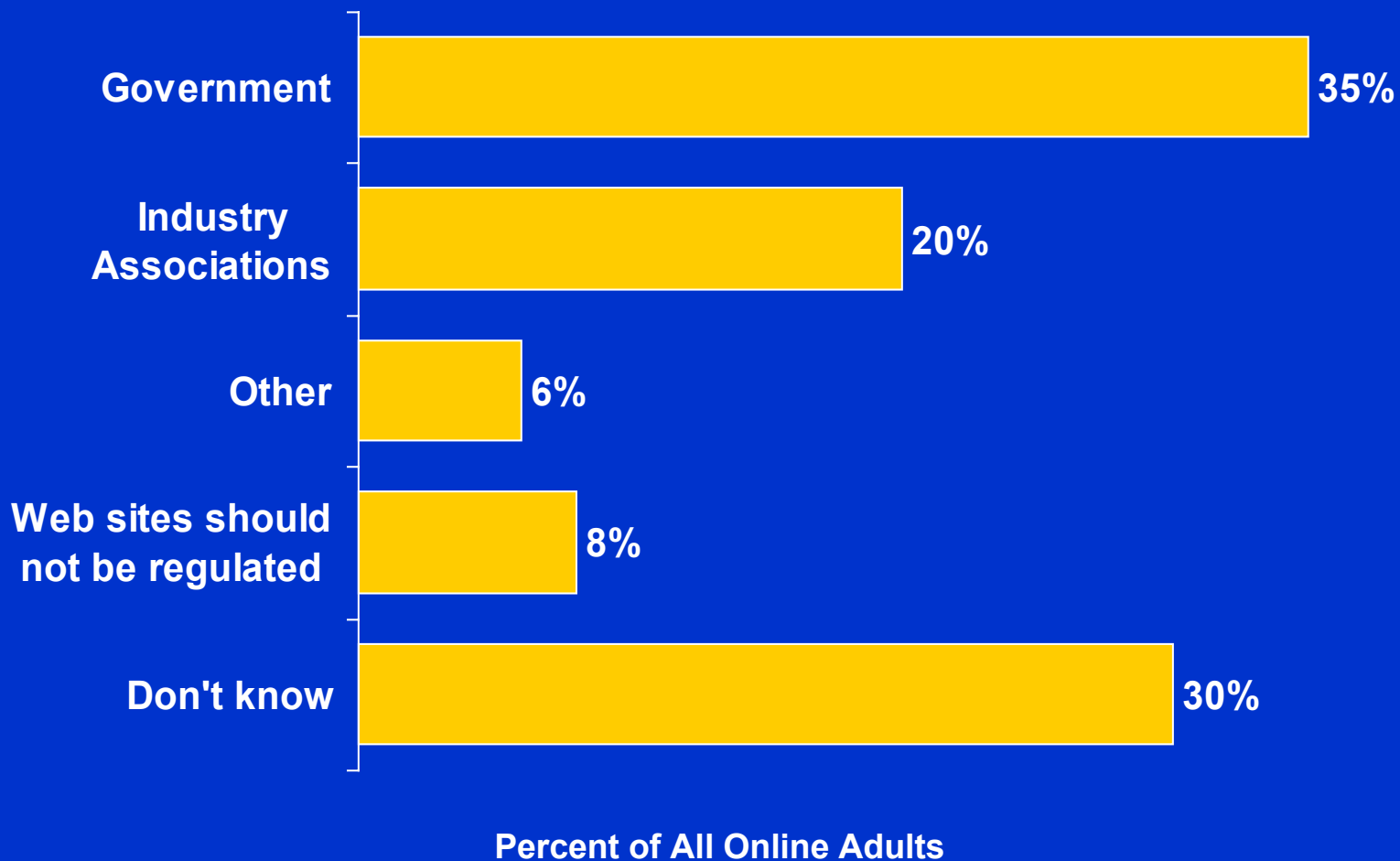
“As Far As You Know, Are There Current State or Federal Laws That Protect the Privacy and Confidentiality of Personal Medical Information on the Internet?”



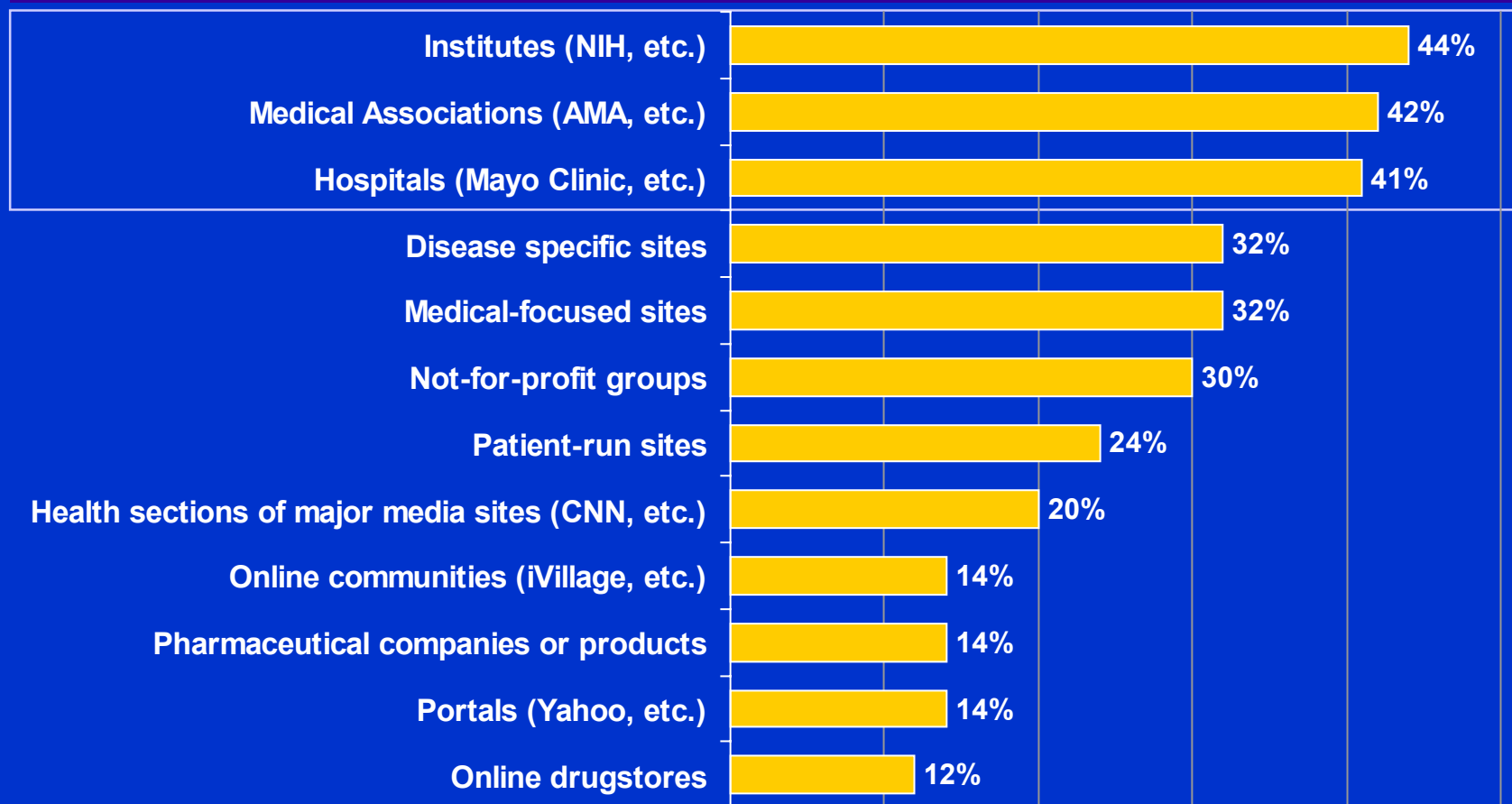
Percent of All Online Adults



Who Should Be Responsible for Regulating Health Sites and the Way They Use Information Obtained from Visitors



Sites trusted to keep personal health information private and secure



Percent of online health seekers rating 4 or 5 on 5 pt. scale
where 5 = high level of trust"

Summary

The average American Internet user is:

- **concerned about the privacy of online health information**
- **suspicious of the ethics of many Internet health Web sites**
- **uncertain whether personal health data are protected by law**
- **confused about who should regulate Internet health information, or if it should be regulated at all**