

CONSUMER ATTITUDES

Consumer demands will ultimately drive the success of HIT systems and EHR adoption. In previous years, public opinion on the use and implementation of HIT was sampled by a few organizations and industry groups every year. 2009 has seen a dramatic increase in this type of research as groups are eager to better understand the needs and attitudes of consumers before major health information technology projects are implemented. All the polls, both before and after 2009, have found that across political and demographic groups Americans overwhelmingly support HIT.

Studies before 2009 were largely conducted by stakeholders—primarily industry groups and technology advocates—to show evidence of public support for health information technology while giving voice to ongoing privacy and security concerns. The Markle Foundation, which promotes the utilization of information technology, sponsored a series of such surveys. In 2005, when asked if they supported the use of secure patient-controlled EHRs available through a decentralized nationwide information exchange, 72 percent of respondents were in favor. In 2006, the Foundation followed up with a survey to examine attitudes about electronic personal health records (PHRs). They found that 65 percent of respondents are interested in accessing their health information electronically. However, 80 percent expressed concern about identity theft or fraud and 77 percent worried that their information would be accessed by marketers. Most recently, in 2008, the Foundation conducted a survey on the perceived benefits of PHRs. Almost half of the respondents expressed interest in using a PHR and a majority believed they could be valuable tools for checking for errors, tracking expenses, and avoiding duplicate tests.

Similar early studies on consumer attitudes toward HIT include a 2007 poll conducted in Texas by Dell and Zogby International which found that 76 percent of respondents believe quality and efficiency of care will improve as more information technology is introduced to healthcare. Another widely cited 2007 poll by the Wall Street Journal showed that most Americans strongly believe EHRs can improve care, decrease medical errors, and reduce costs. Of those surveyed in the Wall Street Journal Poll, 51 percent believe that the use of EHRs makes it more difficult to ensure patients' privacy, a 10 percent decrease from a similar 2006 Wall Street Journal survey.

Studies have also found that the more consumers know about health information technology, the more positive they are likely to feel about it. In 2007, the ehealth Initiative examined public opinion to gain an understanding of attitudes around secure electronic health information. The survey took place through focus groups and by phone in five Gulf States including Texas. They found that 70 percent of respondents favored the development of secure electronic health information exchange. The research also found that a respondent's impression of a "secure electronic HIE" became more favorable when further information was provided to define the term.

Pollsters have also shown interest in HIT as it relates to political opinions. In 2008, the Computer Sciences Corporation found that 70 percent of those surveyed would be more likely to vote for a

presidential candidate who would support the creation of a nationwide health information network.

Since the beginning of 2009, five significant consumer attitude studies on HIT have been conducted. Not only has the pace of research increased, but more qualitative methods are being employed and the entities conducting research now represent a more diverse field including research hospitals and governmental agencies—the purchasers, rule makers, and providers who will be responsible for making nationwide HIT a reality.

In June 2009, researchers from Beth Israel Deaconess Medical Center published findings from a qualitative study that sought to identify patient attitudes toward electronic health information technologies. Their four focus groups found that consumers want technology that uses their personal profiles to customize information and advice. The participants also expected technology to help patients monitor their health, provide real time feedback, and communicate with clinicians as needed. Researchers found that patients are willing to trade some privacy in order to have records fully available in emergency setting and accessible to new caregivers.

In March, the Harvard School of Public Health, the Kaiser Family Foundation, and National Public Radio conducted a public opinion poll on a number of healthcare issues including the use of EHRs. The majority of those polled said that they believed EHRs would help physicians coordinate care, improve quality, reduce the risk of medical errors, and reduce unnecessary care. Despite the perceived benefits, the majority of respondents did not see a direct link between improved quality through EHRs and lower medical costs.

Another significant report was released in September 2009 by the Agency for Healthcare Research and Quality. The report, titled *Consumer Engagement in Developing Electronic Health Information Systems*, sought to understand consumers' attitudes concerning health IT and learn how the public wants to be engaged in its development. Through 20 case studies conducted around the country, the researchers learned that consumers are optimistic that health IT will benefit the quality of healthcare. Most participants initially thought that consumers should not determine how health IT is designed and used because they lack knowledge and expertise. However, when it came to matters of privacy and security, participants said that they want to have some say in how their information is shared.

Other recent studies include the Microsoft Health Engagement Survey which found strong support for health IT and revealed that most patients want to use HIT to improve their health habits and self-manage conditions. Finally, in April 2009 the Deloitte Center for Health Solutions survey revealed interesting demographic differences relating to attitudes on privacy and security. Four in ten consumers surveyed reported that they are very concerned about privacy and security, but women over the age of 65 and men between 18 and 24 were most willing to share personal health information online. Women were also more likely than men to seek online access to physicians, medical records, and health maintenance tools.

Table 2 chronologically details the methods and findings of all HIT consumer attitude surveys conducted since 2005. Due to phrasing and differences in methodology it is difficult to make

comparisons across public opinion surveys. However, polls consistently show that while the public maintains concerns about security and privacy, HIT has a significant amount of support.

TABLE 2: SURVEY FINDINGS

SURVEY	YEAR	METHODOLOGY	KEY FINDINGS
Markle Foundation	2005	Telephone survey of 1,600 adults.	72% are in favor of secure, patient-controlled EHRs and decentralized information exchange system.
California HealthCare Foundation	2005	Telephone survey of 2,100 adults.	55% feel secure when medical records are stored electronically.
Markle Foundation	2006	Telephone survey of 1,003 adults.	65% want electronic access to health records. 80% express security concerns.
Dell-Zogby	2007	Online poll of 1,040 Texas adults.	76% believe technology can improve quality and efficiency.
eHealth Initiative	2007	Focus groups and a phone survey of adults in Gulf States.	70% favor development of secure health information exchange.
Wall Street Journal	2007	Online survey of 2,153 adults nationwide.	67% believe EHRs can improve quality of care. 63% believe EHRs will decrease medical errors. 55% think costs can be reduced. 51% think the use of EHRs makes privacy more difficult to ensure.
The Council for Excellence in Government	2008	Telephone poll of 1,000 adults nationwide.	78% favor giving doctors shared access to medical records. 59% believe EHRs would improve quality of care. 53% believe EHRs will help patients manage health. 48% believe EHRs will lower costs.
Computer Sciences Corporation	2008	Online survey of 1,000 adults nationwide.	70% more likely to vote for a candidate who supports nationwide health information network. 47% believe EHRs will decrease costs. 60% believe HIT will improve care.
Employee Benefit Research Institute	2008	Telephone interviews with 1,000 individuals over 21.	60% feel shared, centrally maintained EHRs are important. 62% not confident that such records will remain confidential.
Markle Foundation	2008	Survey of 1,580 adults.	Almost 50% would like a personal health record (PHR). 79% believe a PHR would help patients manage

			health. 24% have concerns regarding privacy.
Deloitte Center for Health Solutions	2009	Online survey of 4,000 adults.	9% have an electronic PHR and 42% are interested in establishing a PHR that will connect with their physicians. 40% are concerned about privacy and security.
Kaiser Family Foundation	2009	Telephone survey of 1,238 adults.	72% believe that EHRs will help physicians coordinate care. 67% believe that EHRs will improve care.
Microsoft Health Engagement Survey	2009	Online interview of 1,002 adults.	62% believe that personal health record services are valuable. Most want insurers and providers to coordinate care, help improve health habits, and help self-manage conditions.
Beth Israel Deaconess Medical Center (BIDMC)	2009	Focus group with 82 adult BIDMC patients in MA, FL, ME, and CO.	Consumers want technology that will provide customized information and feed-back, monitor their health, and communicate with clinicians when needed. Patients willing to compromise some privacy to make records available to new caregivers.
Agency for Healthcare Research and Quality	2009	192 adults interviewed through 20 focus groups in five regions.	Participants are optimistic that health IT will benefit the quality of healthcare. Participants feel that they need to have a say in how records are used to protect their privacy and security.