Social Media Use in U.S. Healthcare Provider Institutions: Insights from Frost & Sullivan and iHT2 Survey

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Method Details and Background

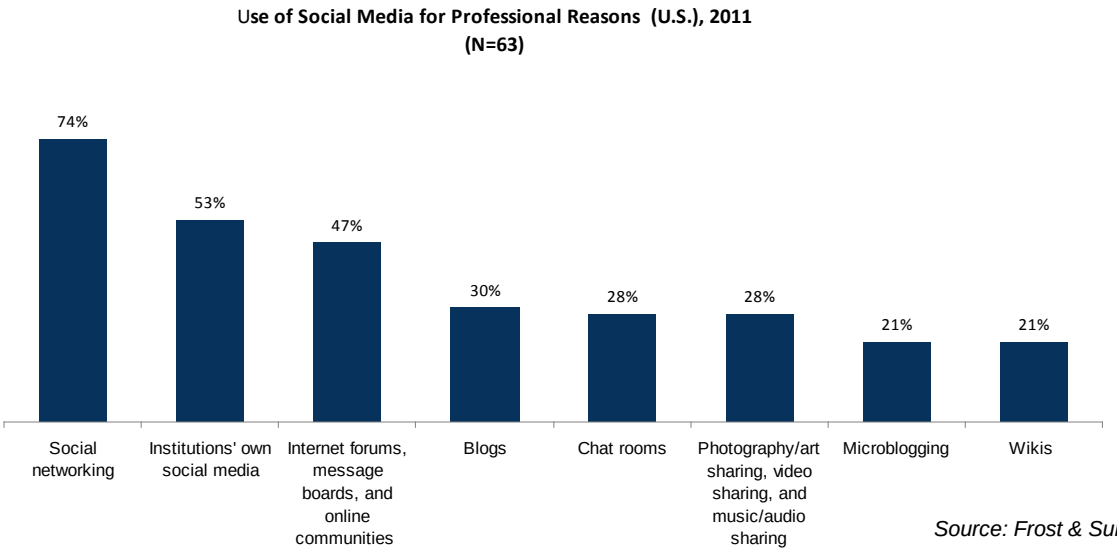
Frost & Sullivan recently conducted a web-based survey in conjunction with the Institute for Health Technology Transformation (iHT2) to understand trends in the use of social media[1] within U.S. provider institutions. The field work was conducted between April and May of 2011 and consisted of roughly 50 close-ended questions targeted at employees of healthcare provider institutions who are at least aware of social media, whether they use it or not. The scope of the research is to provide basic benchmarks around personal, individual professional and institutional use of various social media tools; however, most of the questions focus on the use of social media by employees within their healthcare institutions. The goal is to gage issues around institutional access, purpose, expectations, and potential concerns; to assess institutional policies, staffing, and budgets; and to determine the current impact of social media among provider institutions. Our respondents consist of 63 individuals working in various capacities within U.S. healthcare provider institutions which include public or private hospitals (n=42), physician offices (n=10), and various other patient care settings (n=11). Information technology professionals represent the majority of respondents across all settings (33% of total respondents). Also represented among the total respondents are administration professionals (13%), physicians (7%), and other healthcare professionals (6%). The majority of total respondents (60%) work in institutions with over 500 employees. Among the 42 respondents working in hospitals, the majority (59%) work for hospitals with more than 250 beds. Respondents are fairly evenly split between male and female (54% versus 46%, respectively) and a majority (73%) have over ten years of experience in the healthcare sector.

[1] Our definition of social media for this survey refers to a variety of web-based tools used to create and share content in real-time with individuals and organizations, e.g., social networking (Facebook, MySpace, LinkedIn, etc.); blogs (WordPress, TypePad, etc.) and microblogs (Twitter, etc); video sharing sites (YouTube, etc); photo sharing sites (Flickr, etc); and other collaborative and content sharing tools like wikis, chat rooms, and podcasts. We also differentiated between these various types of commercial social media tools and that of an institution's own social media tools that incorporate many of the same features and functions as the commercial tools.

Selected Findings from the Survey

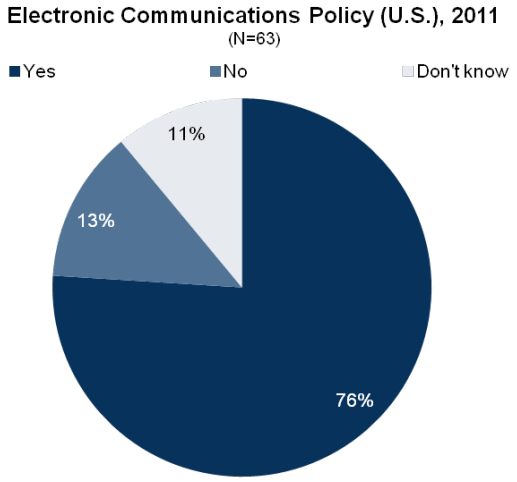
- Our survey indicates that the use of social media is very high among our 63 respondents, with 84 percent reporting they use social media for personal purposes, 75 percent use it for professional purposes within their institutions, and 68 percent use it for both personal and professional reasons.
- For those who use social media for professional purposes, only one-third use it as a part of their professional obligations.
- Seventy-four percent of respondents identify social networking sites (e.g, Facebook, MySpace, LinkedIn, etc.) as the most popular type of social media tool used for professional reasons *(Chart 1).*
- One-third of institutions do not allow access to social media for employees, typically due to security issues and concerns about employees' productivity. The majority of institutions that allow access to social media employ some policies to control that access.
- Most institutions have a specific electronic communications policy in place *(Chart 2).*
- In total, over half (53%) of institutions use either dedicated staff and/or external parties for their social media efforts (38% and 19%, respectively).
- The most popular reason cited for the institutional use of various social media tools is related to marketing/brand awareness and business development purposes.
    - Among the largest proportion of respondents, social media are perceived as meeting or exceeding institutional expectations (60%). *(Chart 3)*

Chart 1: Q- Which of the following social media do you use for professional reasons?



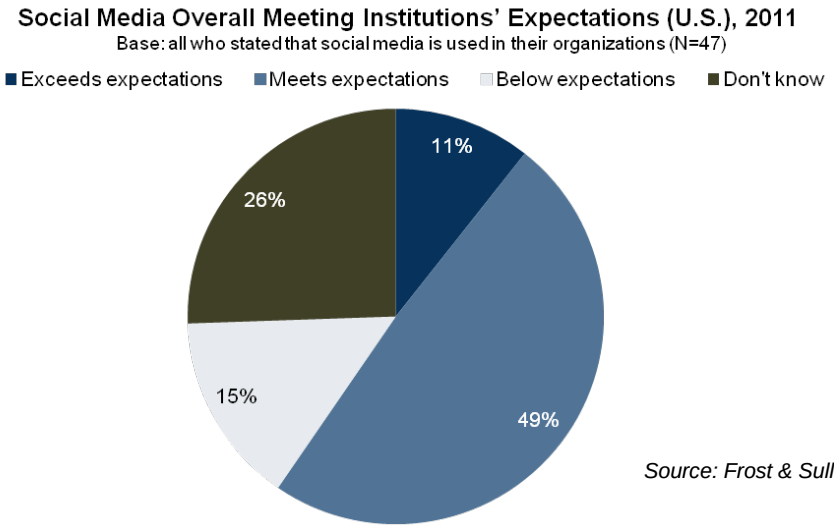
Source: Frost & Sullivan, 2011

Chart 2: Q - Does your institution have an official Electronic Communications policy in place?



Source: Frost & Sullivan, 2011

Chart 3: Q - How is the use of social media generally meeting your institution's expectations?



Source: Frost & Sullivan, 2011

Discussion

The results of the survey reveal the strong popularity of social media among individuals who work in healthcare provider institutions, perhaps not surprising given our respondent profile (e.g., mostly senior level IT and/or clinicians in large provider organizations). However, it is surprising that so many respondents are able to access social media tools at work. This finding conflicts with many reports recently about the somewhat immature use of social media within the walls of healthcare provider institutions. While these survey results would point to a more robust use of social media tools in provider environments, in general, the larger market trends outside of this small survey indicate that the use of social media within healthcare provider institutions is still in its infancy. There are many reasons for this, foremost of which is the fact that many providers are still developing best practices protocols around privacy and security concerns related to sensitive patient information. Clearly, the strict rules related to patient privacy drive a lot of current policy around the use – or lack of use – of social media among healthcare providers. This differs from social media privacy concerns seen in other industries, which may be driven more by issues around market competition, protecting intellectual property, managing brand identify and awareness, and so on. Obviously, healthcare providers cannot talk about patients in public forums or share information about patients in social media forums. In fact, physicians and other clinicians have recently been sanctioned for doing just that, which is clearly a HIPAA violation. Also of concern are legal risks associated with patient-provider communications that may occur within a social media context.

Another restraint on social media could be related to expectations – i.e., what can social media really do for an institution? As mentioned previously, over half (60%) of the surveyed respondents indicate that social media is perceived as meeting or exceeding expectations, yet roughly one-quarter do not know whether social media meets expectations or not, possibly because expectations are not yet defined. Industries outside of healthcare often cite sales, business development, and client/customer service as the chief reasons driving the creation and maintenance of robust social media programs. Precautions around privacy and restrictions around patient-provider communications have perhaps led many healthcare provider institutions to feel that social media does not have the ability to directly impact patient care, their core mission, and is mostly just a marketing tool.

Despite these concerns, there are signs in the market of building momentum and excitement around the potential for social media within healthcare institutions, particularly for areas outside of marketing and more specifically related to improving patient care. For example, the Veterans Affairs (VA) recently announced a new directive that “highly encourages” employees to use social media tools like Facebook, Twitter, YouTube, blogs, chat rooms, and so on to interact with

patients and other members of the public as part of their many other IT-related initiatives designed to provide seamless access to information for VA stakeholders.

Outlook for the Future

While the VA and similar large provider institutions are leading the way forward with the use of social media for patient engagement, the majority of U.S. hospitals, physician practices, and other care settings have yet to take full advantage of the potential of social media to engage patients, employees, and other stakeholders for a variety of needs related to clinical, operational, research, competitive, and business development purposes. Clearly, use of social media is a well-established phenomenon among individuals (65% of adults online use social networking sites according to the latest Pew survey released August 26, 2011[2]) and across many business organizations. Yet, in the healthcare provider environment, adoption of social media tools is lagging - as is the case with so many other aspects of IT as it relates to healthcare. But that attitude is changing and healthcare provider institutions both large and small need to understand the risks and opportunities associated with social media tools. For many people, particularly those of the digital native generation, social media tools are an essential component of daily life. Patients and other stakeholders have had access to online resources for some time; social media tools are yet another layer of available communication. The popularity of mobile devices like the iPhone and the iPad is dramatically accelerating the accessibility and growing use of these tools as well. Despite the risks, social media will continue to grow throughout society and that use will increasingly permeate the healthcare provider environment. Social media has numerous benefits for healthcare consumers, individual clinicians, and provider institutions. Safe uses for social media include collaborative research (wikis), marketing and customer feedback, and communities of interest/patient support group – all of which have enormous and untapped potential to positively impact the patient experience.

This survey points to some positive signs and signals some potential areas of weakness that still need to be addressed in this emerging space. Still, Frost & Sullivan is very bullish on the use of social media tools for healthcare providers and we believe that technology will evolve to solve some of the privacy concerns that are unique to this environment. On the IT vendor side, the winners in this market will understand the unique needs and characteristics of all healthcare stakeholders and develop technology tools accordingly. For providers, an enormous opportunity exists for institutions to harness the power of social media to create – and monitor – communities that strengthen the institution's reputation and empower patients with information that leads to more efficient healthcare decisions. To drive the social media movement forward, a significant

[2] http://pewinternet.org/Reports/2011/Social-Networking-Sites/Overview.aspx

opportunity exists for individuals working within healthcare provider organizations – IT professionals, clinicians, and administrators, and others – to demonstrate the return on investment of social networking (e.g., patient outreach, access to information) to the institution in hopes that the institution can adopt more robust programs that benefit all stakeholders, both internal and external. The potential for positive impact is enormous and too important to ignore.

Frost & Sullivan: Social Media Use Among U.S. Healthcare Provider Institutions, September 2011, N967-48. ***For questions about access to the full survey, please contact Nancy Fabozzi at nancy.fabozzi@frost.com***