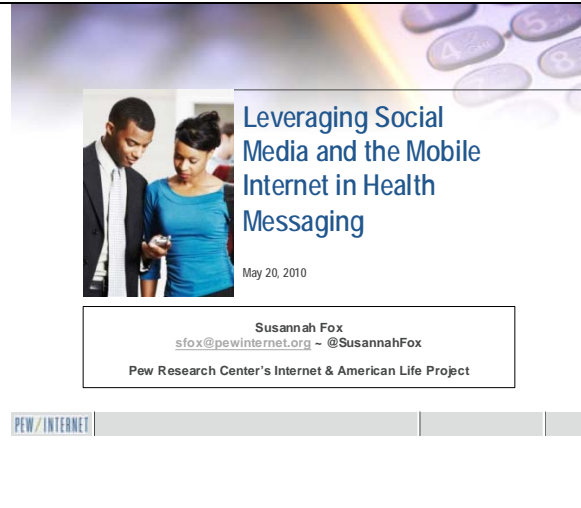


Slide 1
Leveraging Social Media and the Mobile Internet in Health Messaging

**Susannah Fox,
Pew Internet &
American Life
Project**

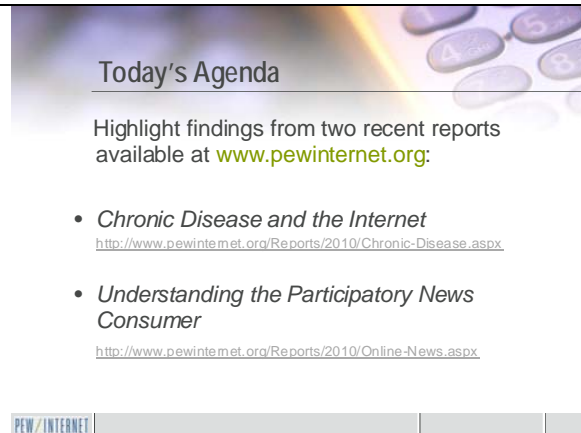
May 20, 2010



I work for the Pew Research Center. I've been there for 10 years studying the social impact of the Internet. We rely mostly on telephone surveys, which do incorporate now, mandatory at the Pew Research Center, a cell phone component because of the growing cell phone-only population. We also very often include Spanish-language interviews, again, to get a clear picture of the changing population in the U.S.

We talk to people who use the Internet and we still talk to the small segment of the population that is not online because we believe that the Internet is impacting those who are online, those who are not online, and everyone along the spectrum because people who are not online may actually have second-degree access. So essentially when you're thinking about your websites don't count out the people who are still offline or the people who are on dial-up. They may be able to get somewhere to watch a video or they may have someone in their life who can print material out from the Internet.

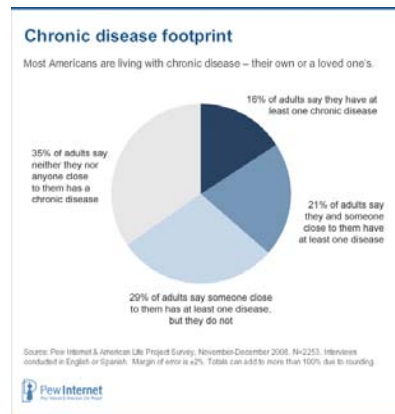
Slide 2
Today's Agenda



Something to know about the Pew Internet Project is that we publish all of our reports and our data sets online for free. This is funded by the Pew Charitable Trust. They believe that the best way for people to make policy decisions is to have data about them.

And so, we've been about open data since the year 2000 and it's really an honor to be able to essentially serve as market research for non-profits, policy makers, government, as well as for profits. I get a lot of calls from for-profit consultants. So, I'll be talking mostly about two reports – Chronic Disease and the Internet as well as Understanding the Participatory News Consumer, as well as some highlights from a report called Government Online

Slide 3
Chronic Disease Footprint

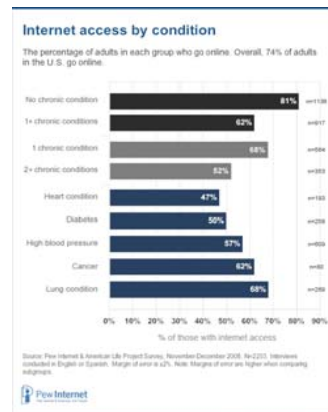


So the reason why I'm going to talk about the Chronic Disease report is that, of course, everyone here is interested in how people get health information online. That is much of what you are trying to get out to the American public. And, one of the most important points from yesterday's conversation at the NIH was the importance of audience segmentation.

And, so this is just one segment which I am going to talk about and that is people who are living with chronic disease or whose lives are touched by chronic disease and what this chart shows is that it's actually a minority of Americans who are not living with chronic disease or living with someone who has chronic disease.

And by chronic disease, I mean the five that we included in our survey, and that is heart condition, lung condition, high blood pressure, diabetes and cancer. And, what we wanted to do was map this population in a way that we hadn't seen done before in terms of understanding who's online, who's not online and what effect the Internet is having on their lives.

Slide 4
Internet Access by Condition

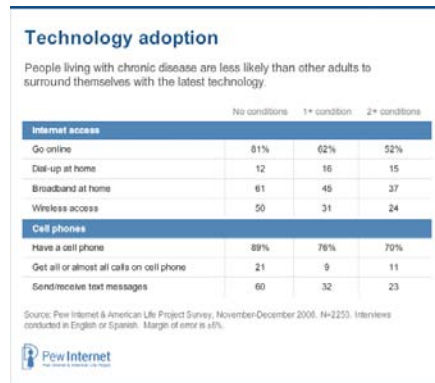


Not surprisingly, we find that there's significant difference when it comes to different conditions in terms of who's online, who's not online. 81% of people reporting no chronic condition are online. If you have one condition, one or more, 62% or more are online. Two plus chronic conditions, 52% are online and then these are the five conditions. I'll be coming out with a report about each specific condition group. We can't compare them cause, of course, high blood pressure is one that's threaded throughout. But I will have a specific report about each condition group.

What we find is that Internet access is unevenly distributed. People who are higher income, higher education are more likely to be online. We now see no difference between men and women. But you can add chronic disease to the list of factors that predict whether someone is online and we did the very complicated regression analysis with our survey data to show that chronic disease does have a significant, independent effect on predicting whether someone has Internet access, a negative effect.

People living with chronic disease are less likely to have Internet access. It's not just that they're older. It's not just they're less likely to have the income or education that would predict having a computer or having a mobile device. Chronic disease is associated with being offline.

Slide 5
Technology Adoption



So, I'm basically throwing up these charts. All the charts are available on our website either individually or as part of the full report. One thing I wanted to highlight was the wireless access line.

So, for those reporting no chronic conditions, 50% go online wirelessly. Now they might also have a desktop at work or at home. They have a mobile device or a laptop that allows them to go online wirelessly. This is changing people's information, people's relationship with information. In changing people's relationship with information by having Internet on the go wherever they are, it's changing their relationships with institutions. It's changing their relationships with you. It's changing their relationships with doctors. It's not replacing them. It's just supplementing.

And I think that's a really, really important point. That when we look at who's online and who's not online, when we include wireless access the differences between African American adults and white adults disappears. It eradicates the digital divide. That's a really, really important point especially as we look at the growing cell phone segment and the growing wireless segments.

So one of my messages to you is as you are reading the technology headlines, as you hear about what the FCC is doing in terms of broadband, think about it in terms of your work, and think about how, what are you doing to prepare for this mobile revolution because, again, in terms of audience segmentation we did a typology which showed that there really is a pretty stark difference between what we call the "stationary medium" majority and those who are motivated by mobility. And, those who are motivated by mobility are more likely to be younger, they're more likely to share and comment on the news and information of the day and they are very likely to get this information on the small screen.

Slide 6
Chronic Illness and the Internet...

Chronic Illness and the Internet...

- Living with a chronic disease has an *independent, negative effect* on someone's likelihood to have internet access.
- The internet access gap creates an online health information gap.
- Once online, having a chronic disease *increases* the probability that someone will take advantage of social media to share what they know and learn from their peers.
- Once online, having a chronic disease *increases* the probability that someone will access user-generated health content.

PEW/INTERNET

So, what I'm talking about here is, again, this effect, the chronic disease effect we found in our data is that people are less likely to have access to the Internet. What was really incredible...I spent about five months completely immersed in data about chronic disease. And, what I found is that "yes" that while people are offline, once they're online, people living with chronic disease are actually more likely to access user-generated content. Chronic disease is significantly and independently associated with wanting to get information on blogs, wanting to write a blog themselves, wanting to share and contribute. And, that was a really interesting finding to me and I'd love to hear what you all think of that.

Slide 7
Internet Activities

Internet activities

What internet users reporting 2+, 1+, and no chronic conditions do online

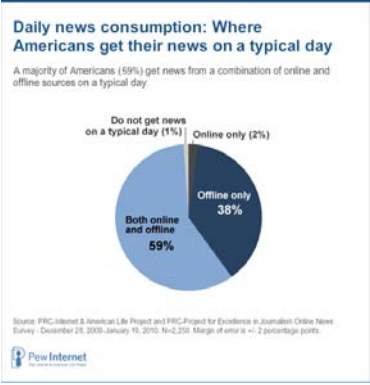
	No conditions	1+ conditions	2+ conditions
Send or read email	90%	90%	91%
Bank online	88*	46	45
Look for info on Wikipedia	81*	38	31
Get financial information	40*	32	28
Use social network site**	39*	25	19
Read someone else's blog	34*	28	25
Use Twitter or another service**	12*	7	7
Buy or sell stocks, mutual funds, or bonds online	12*	9	5
Create or work on your own blog	11	12	11
Participate in an online discussion	7	8	8

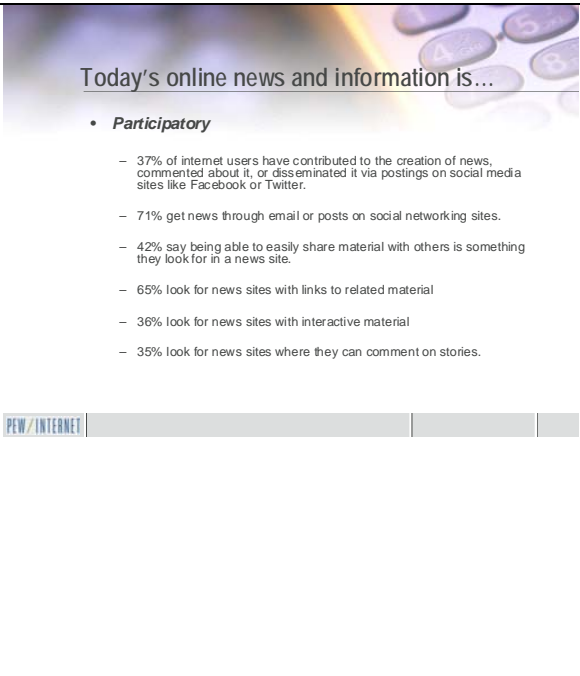
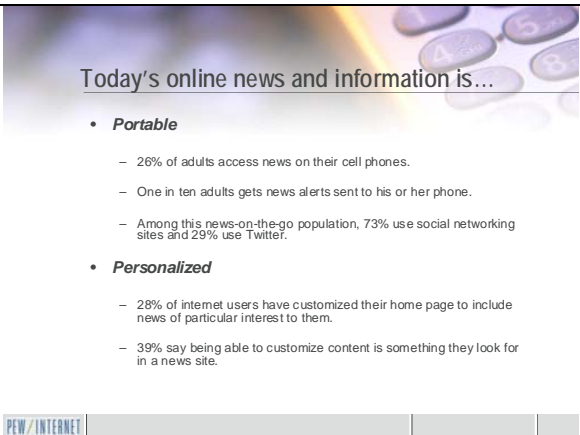
* indicates a significant difference between those without chronic conditions and those with chronic conditions.
 **Twitter and social network site use have grown since this survey was fielded.

Source: Pew Internet & American Life Project Survey, November-December 2008. N=1650. Interviews conducted in English or Spanish. Margin of error is ±3%.

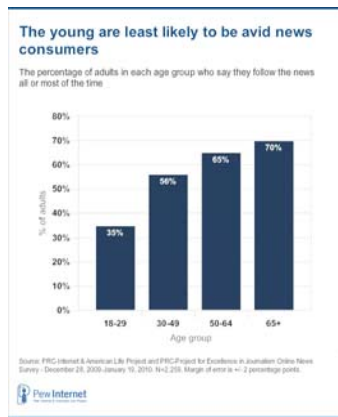
PEW INTERNET

So here's a slide about Internet activities and again breaking it out those who have no conditions, those with one or more, and those with two or more conditions. And this is those who are online and what I wanted to call out here was the line about using a social network site. And, these are actually pretty old numbers at this point. This data is from December 2008. Our more recent data shows that half of American adults are now using social network sites. We're almost reaching a saturation point with those under 30. And I wanted to highlight that while it might be, you know, stereotype that people who are older and that maybe people who are living with two or more chronic conditions are not on these social network sites like Facebook Myspace. Actually they are. Back in Dec 2008, one in four were using these social network sites. We can talk about what, what your strategy might be. Yesterday, it was a major question out at the NIH: so what are we going to do about Facebook? I personally, the Government Online report found that it's only about 5% of Internet users who have friended or become a fan of a Federal agency's Facebook page. I actually wouldn't put a lot of chips on your Facebook page. I think it's absolutely fine to have a Facebook page as a source, as another resource for people but what I see personally and what we see in our data is that people are using Facebook and Twitter and Myspace and all these social sites to share what they find interesting. So, now what we find is that citizens are your press agents. Think about how you can optimize your website, do what you're already doing but make it visual because that is what we find is really shareable, really popular, something that goes viral on Facebook is something that has a really beautiful image or an arresting image, something that has a video, something that has a really nice chart. I myself when I'm sharing something on Facebook, I'll look at what icon comes up and sometimes I won't link to it if there's not a good icon, so think about that and, by the way, if you don't yet have a Facebook page, go ahead and get in there. It's almost like

		<p>seeing the web for the first time. Once you start to understand how people are sharing information on these social network sites.</p> <p>I will confess that I have two Facebook profiles. I have a personal Facebook profile for my childhood friends and my oversharing aunt who likes to scan in pictures of me as an adolescent and so I madly untag them. And so, but I also have a professional Facebook profile because what I found is that Twitter wasn't enough. I found that there were some really, really interesting people who are sharing some really interesting information on Facebook and I didn't want them to see me as a 13 year old. So, I have a professional Facebook profile and feel free to friend me and you'll know the difference because you'll see the Susannah Fox and I literally use a picture from childhood on one and then me on the other. So, that's personally my strategy for using FB and the Pew Internet Project, for example, has a Facebook fan page and we have like 500 fans. That doesn't matter. It doesn't matter how many fans we have. It doesn't matter how many fans or friends you have. What matters is that -- are you sharing what you have? And one of the points I made yesterday at the NIH: information is currency and you're a bank and you should be open 24 by 7 by 365 because your customers are ready, your customers are waiting, your customers are your fans, and your customers are ready to serve you. That's the message of social media.</p>								
<p>Slide 8 Daily News Consumption</p>	 <p>Daily news consumption: Where Americans get their news on a typical day</p> <p>A majority of Americans (59%) get news from a combination of online and offline sources on a typical day.</p> <table border="1"> <thead> <tr> <th>Category</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Both online and offline</td> <td>59%</td> </tr> <tr> <td>Offline only</td> <td>38%</td> </tr> <tr> <td>Do not get news on a typical day</td> <td>1%</td> </tr> </tbody> </table> <p>Source: PRC, Internet & American Life Project and PRC, Project for Excellence in Journalism Online News Survey, December 28, 2009-January 10, 2010. N=2,320. Margin of error is +/- 2 percentage points.</p> <p>Pew Internet</p>	Category	Percentage	Both online and offline	59%	Offline only	38%	Do not get news on a typical day	1%	<p>We do a report about participatory news consumers. What we find it's, it's pretty incredible. There are fewer and fewer people who are only getting their news offline. How many people get a daily print newspaper delivered to their house? I'll confess I still get two. I'm really old school.</p> <p>I grew up in a household with a journalist. We got four daily newspapers at my house growing up, so, I can't go down to less than two. But, it's really unique in the United States these days. TV is still really important. Yes, newspapers are important. But, increasingly people are getting their news online.</p>
Category	Percentage									
Both online and offline	59%									
Offline only	38%									
Do not get news on a typical day	1%									

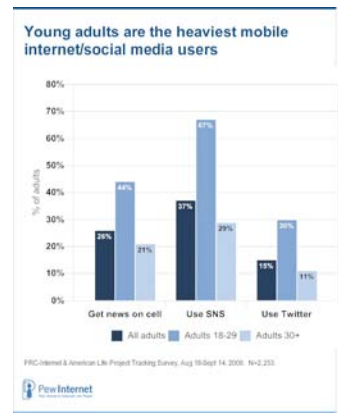
<p>Slide 9 Today's Online News Information</p>	 <p>Today's online news and information is...</p> <ul style="list-style-type: none"> • Participatory <ul style="list-style-type: none"> - 37% of internet users have contributed to the creation of news, commented about it, or disseminated it via postings on social media sites like Facebook or Twitter. - 71% get news through email or posts on social networking sites. - 42% say being able to easily share material with others is something they look for in a news site. - 65% look for news sites with links to related material - 36% look for news sites with interactive material - 35% look for news sites where they can comment on stories. <p>PEW/INTERNET</p>	<p>Seventy-one percent of Internet users get news through e-mail or posts on social networking sites. That's incredible, right? I mean, think about the implications of how people are getting news. If you're in charge of getting your news out to the general public or even to influential audience you need to infect the bloodstream with your information.</p> <p>Should the web team be the same as the social media team? I found this such an interesting question and I couldn't get it out of my head. And I tweeted it this morning and immediately all sorts of people tweeted back: "No, absolutely not. No, it shouldn't be the same team." You know, web is different than social media. Except a couple people tweeted back, "well, it should be a seamless strategy".</p> <p>And, I think that makes a lot of sense. You again have a sense that there what you're doing already should just be optimized for social media. And I hope that's good news because I know that you guys are really stressed and are already doing so much with putting data online, with putting images online, with putting reports online. What I want to tell you is that people are really loving it. The Government Online report showed that Americans are really enjoying the ability to access government information online. Forty percent have downloaded data from a government website and we're just at the beginning of this open data initiative. So keep doing what you're doing.</p>
<p>Slide 10 Today's Online News Information</p>	 <p>Today's online news and information is...</p> <ul style="list-style-type: none"> • Portable <ul style="list-style-type: none"> - 26% of adults access news on their cell phones. - One in ten adults gets news alerts sent to his or her phone. - Among this news-on-the-go population, 73% use social networking sites and 29% use Twitter. • Personalized <ul style="list-style-type: none"> - 28% of internet users have customized their home page to include news of particular interest to them. - 39% say being able to customize content is something they look for in a news site. <p>PEW/INTERNET</p>	<p>So, what we found essentially is that news is participatory, portable and personalized.</p> <p>And often what I find is that the data that we bring, this, this quantitative survey data is the data that you can bring to your bosses to say "this is why I need to do this". It's often used in grant proposals for people to say that "This is what we need. This is what Americans are actually doing online." And, so, look at the data and think again – What am I doing today?</p> <p>What is the decision that I am making today about my website responding to these, these tremors that we know are going to have repercussions in the future like mobile phones, like wireless access, like this social web.</p>

Slide 11
Young are least likely to be news consumers



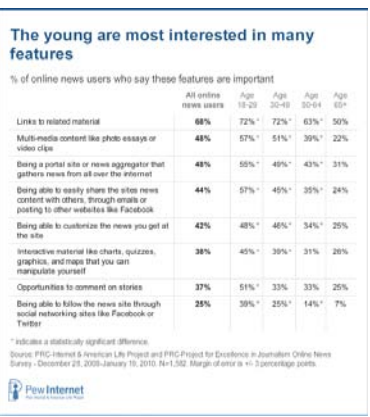
So, young people are not getting their news. Here's 65 plus, 70% say they follow the news all or most of the time. Only 35% of 18 – 29 year olds say they are following the news. This is online or offline.

Slide 12
Young adults are heaviest mobile consumers



Look at this: young adults are the heaviest mobile Internet, social media users. So review, 70% of internet users say they get news from social network sites. If you want to reach 18 -29 year olds, you want to make sure that your data is shareable. That you're making it portable, you're making it participatory and you're making it personalized. Again, information is currency. You're a bank. Open up for your customers and they'll serve you by serving your information, serving your messages, serving your data, serving your images, serving your videos to the rest of their, their publics, not your audience, their audience.

Slide 13
Young adults most interested in features



So this is a really busy slide, but it just shows that you should look at the report and what I will pull out is just looking at the 18 – 29 year olds. So, these are all the features that you might choose to have on your website and you can basically look at this as a menu or a report card.

You know, what are people actually interested in and we'll continue to revisit this and help you to look at trends and you can look at the Government Online report because it's very similar. This is data about news and then we have data also about government websites and what we find is that young people are the most likely to want lots of features.

They really want to be able to share, personalize, and participate. Something else that was very interesting is that African American and Latino Internet users are the most likely to say they want social media and that they appreciate social

		<p>media opportunities coming from government websites. So, again, that's just another link in the chain for deciding what, what are you doing today to get ready for tomorrow..</p>
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