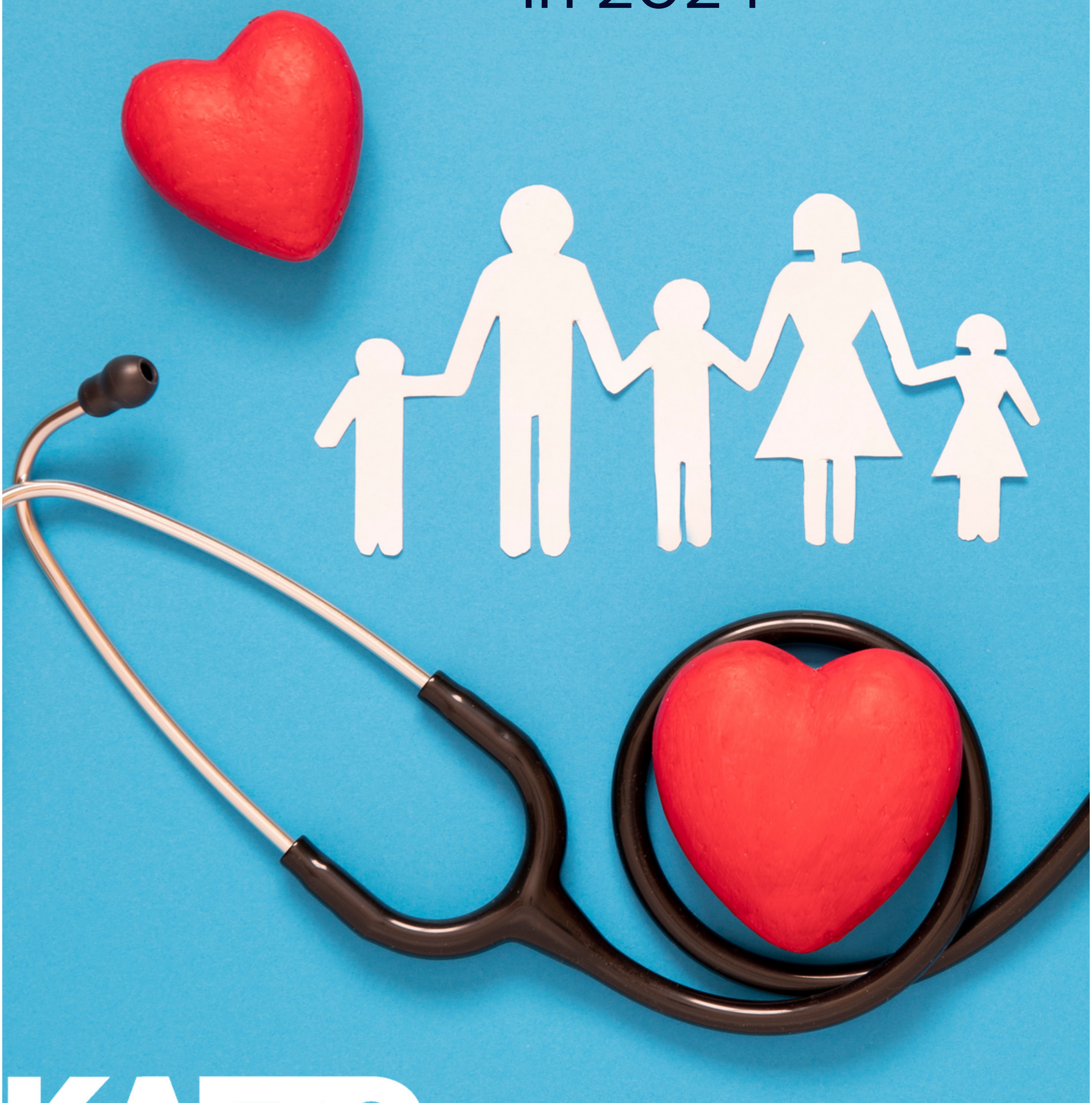
RESEARCH REPORT

Consumer healthcare landscape

Communicating health messages in 2024



KAIZO

Introduction

What health issues are consumers most concerned about? Where do they turn for health information they can trust? What motivates them to act – and what does this all mean for health communications in 2024?

These findings are drawn from a survey of 500 UK consumers*, focusing on their health concerns; which sources people are most likely to turn to for trusted health information; as well as the factors that impact their trust in health information. In addition to this, we analysed public data, including national surveys, academic research, and media reports to support our findings.

This paper outlines key findings from our latest round of research exploring how consumer attitudes to health information are evolving in the post-pandemic era. Our findings show a continued shift in the channels that consumers turn to when seeking health information and the sources they trust.

Key points from the research include:

- People are more worried about their health in 2024 than they were last year.
- Trust in social media has increased, while trust in mainstream media continues to decline.
- Personal beliefs and lived experiences are playing a larger role in shaping attitudes to health information.
- A lack of long-term support and unrealistic expectations are key barriers to positive, sustainable health changes – but community and personal connections are critical motivators.

Out of the 500 participants surveyed in an initial pulse, 395 individuals provided feedback during the subsequent round

Key findings

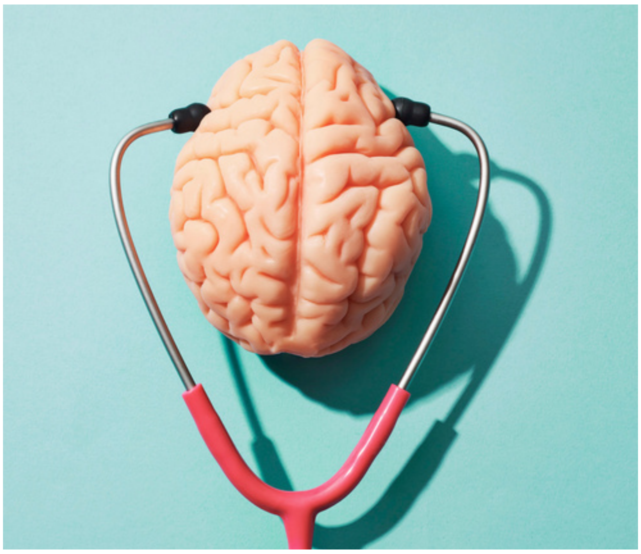
People are more worried about their health

In 2024, we are witnessing a shift in people's concerns about their health. Nearly half of survey respondents (48%) expressed increased worry about their well-being, compared to a year ago. This collective unease transcends age barriers, with 75% of those aged 55-64 and 60% of 16-17-year-olds reporting heightened concerns about their health.

Perhaps unsurprisingly, mental health remains the leading health concern for consumers, ahead of cancer and coronavirus[1]. 33% of respondents to our survey highlighted it as their top worry, mirroring the trend observed in our last report. This was true for 46% of the eldest and 40% of the youngest respondents, indicating the impact on potentially vulnerable segments of society.

Research has also revealed the profound impact of mounting financial pressures, with three in five adults in a King's College London survey reporting that the rising cost of living had a negative impact on their mental health back in November 2022, with no signs of improvement a year later[2].

The growing demand for mental health services underscores the urgency of the situation, as approximately 1.2 million individuals find themselves on mental health waiting lists[3]. The strain on these services echoes the need for increased support to navigate the mental health landscape.



[1]Ipsos Mori, Mental health is now the number one health problem, ahead of cancer and coronavirus, September 2023
[2]Kings College London, Experiencing the cost-of-living crisis: the impact on mental health, October 2023.
[3]British Medical Association, Mental health pressures in England, November 2023

Key findings

Trust in social media increases, while trust in mainstream media continues to decline

Our research found that 34% of survey respondents turn to social media for trusted health-related information, an increase of 14 percentage points since our last report. Our 2024 findings reveal a surprising trend with the highest level of trust in social media observed among the eldest respondents (46%), surpassing the (40%) reported by the youngest age group.

Mainstream media has also experienced a decline. Just 20% of those in our latest survey said this is where they turn for trusted health information, compared to 28% in 2022. This trend can perhaps be attributed to the personalised nature of content delivery and the interactive features that enable users to engage with news in real-time on social media channels. However, data indicates that broadcast media remains a trusted and reliable source, maintaining its position as the primary platform for news consumption more generally in the UK[4].

Healthcare professionals (HCPs) continue to be the most trusted source of information. More than half of respondents (51%) said they would rely on their GP, doctor, or nurse to provide them with trustworthy information to make decisions about their health. This surge in trust is reflective of a Ipsos MORI survey, which positions doctors and nurses within the top five most trusted professions in the UK[5]. We also found that 22% of respondents now depend on pharmacists for health advice, marking a significant rise from the 5% reported in 2020. Pharmacists are emerging as crucial pillars in communities, offering valuable health advice amidst healthcare system pressures.

Number of consumers who turn to social media for heath information

34%

[4]Ofcom, News consumption in the UK, July 2023
[5]Ipsos Mori, Trust in politicians reaches its lowest score in 40 years, December 2023

Key findings

Consumers continue to 'tune-out' from health messages and be less critical of sources

In 2020, 70% of survey respondents said that they would lose trust in a source of health information if it did not come from an HCP. In 2024, this figure has significantly decreased to 45%, suggesting consumers are less likely to interrogate where their health information comes from. People also appear to be trusting their own beliefs and lived experiences more, with 29% of survey respondents reporting they would not trust information if it conflicts with what they believe, up from 17% last year.

35% of respondents indicated that they would lose trust in a source that does not come from someone with personal experience, while 17% expressed a similar sentiment regarding information not originating from someone they could relate to. This shows that both personal experience and relatability are important factors when it comes to consumer trust in sources of health information.

35%

of consumers would lose trust in health information that does not come from someone with personal experience

These changes suggest a continuation of trends observed in our last survey, with consumers 'tuning out' from health information and less inclined to question sources of information. Coupled with the increase in consumers turning to social media for health information, this sets a worrying precedent for the rise of misinformation.

Key findings

The impact of community in achieving health goals

People are often looking to set resolutions or goals focused on improving their health. Our research points to the significance of personal connections and community support in achieving these health goals. When asked what would motivate them to make changes to how they manage their health, the impact of family and friends is a major motivation, with 44% noting the positive influence of someone close to them undergoing a similar health change. 36% prefer advice tailored to their community or personal situation, and 29% find success stories from similar backgrounds crucial for motivation.

This indicates a shift away from generic health messages towards more personalised and community-specific approaches. Providing tailored advice that resonates with the specific characteristics of consumers and their communities can enhance the effectiveness of health information.

Lack of long-term support and unrealistic expectations are key barriers to positive, sustainable changes

Our research identifies two primary barriers contributing significantly to consumers' struggle for positive and lasting health changes: a lack of long-term support (38%) and the perception of unrealistic expectations (37%).

Emotional support, encouragement, and guidance are essential elements in commitment to personal development. The challenge of adopting healthier lifestyle choices is exacerbated by the rising cost of living, including food and fitness expenses, demotivating those aiming for positive changes in their health[6]. Establishing and fostering support networks and setting realistic and achievable goals could be crucial for positive and sustainable change.

[6]The Guardian, People too tired to lead healthier lifestyles, UK survey finds, May 2023

How to create trusted, effective health comms in 2024

1

Empowered consumers are looking elsewhere for health advice – make sure you are there too

- Develop an integrated communications plan that considers all potential touchpoints for your audiences.
- There is a constant competition for attention – consider shorter, visual, more engaging formats for delivering your messaging.

2

Focus on case studies and 'lived experiences' to rebuild trust

- Consumers are tuning out from health information that is not relatable, even when this comes from the sources they trust most. You can no longer rely solely on experts and HCPs to have the same impact. Who else can you use to tell your story? Consider whether scientists and senior execs are the most relatable and credible source for your specific audience – don't be afraid to move away from these tried and tested sources when needed.
- Adding colour through real life stories and experiences also makes your 'package' more appealing to journalists and consumers.

3

Move away from generic health recommendations towards strategies that consider diverse backgrounds and lifestyles.

- There is no 'one size fits all' approach when it comes to health messaging, so focus on understanding your audiences and targeting your content for a bigger impact.
- Consider conducting advisory boards, focus groups or market research to hear directly from your target audiences about what matters to them and what they need from healthcare companies or providers.

KAIZO

Anita Nahal

Director
Healthcare & Pharma
anita.nahal@kaizo.co.uk

Find out more

If you're looking for healthcare or pharma comms support, please get in touch, we'd love to talk.

Kaizo PR
1 Quality Court
Chancery Lane
London, WC2A 1HR

+44 (0)20 3176 4700
info@kaizo.c.o.uk
www.kaizo.co.uk