

# 2023 Edelman Trust Barometer

Special Report:  
Trust and Health in India

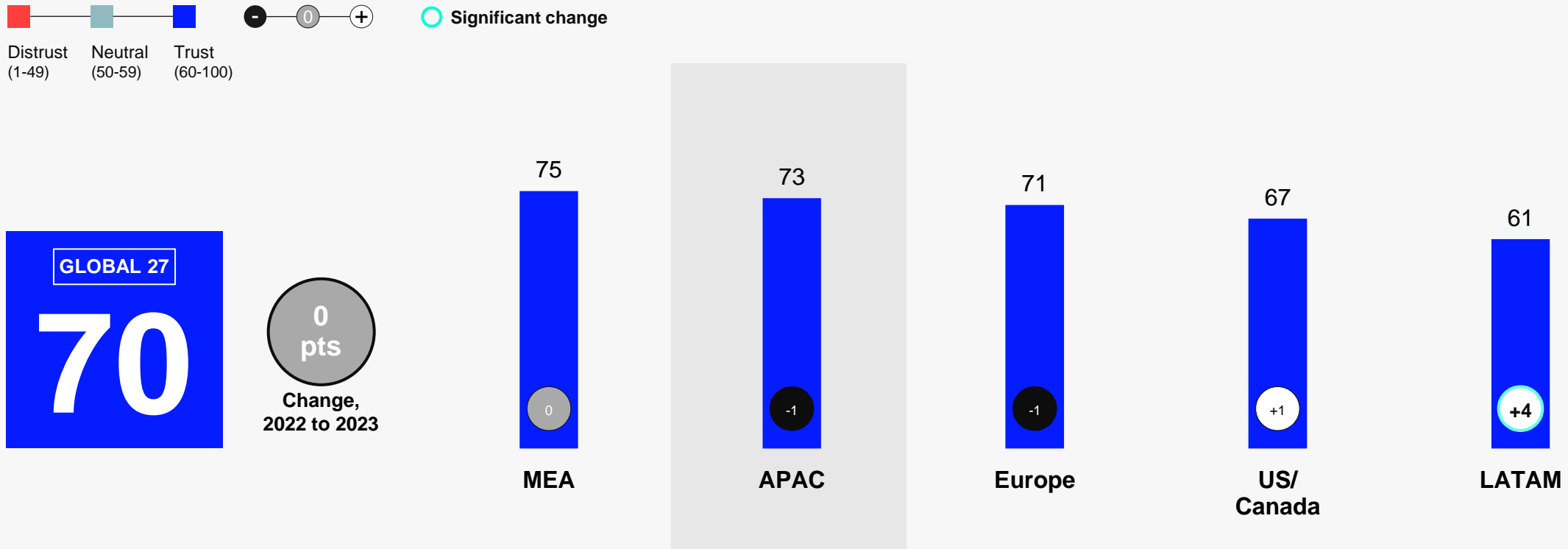


# A Macro Perspective of Trust in the Health Sector



# The Health Sector is Trusted Across All Regions (data from January 2023)

Percent trust

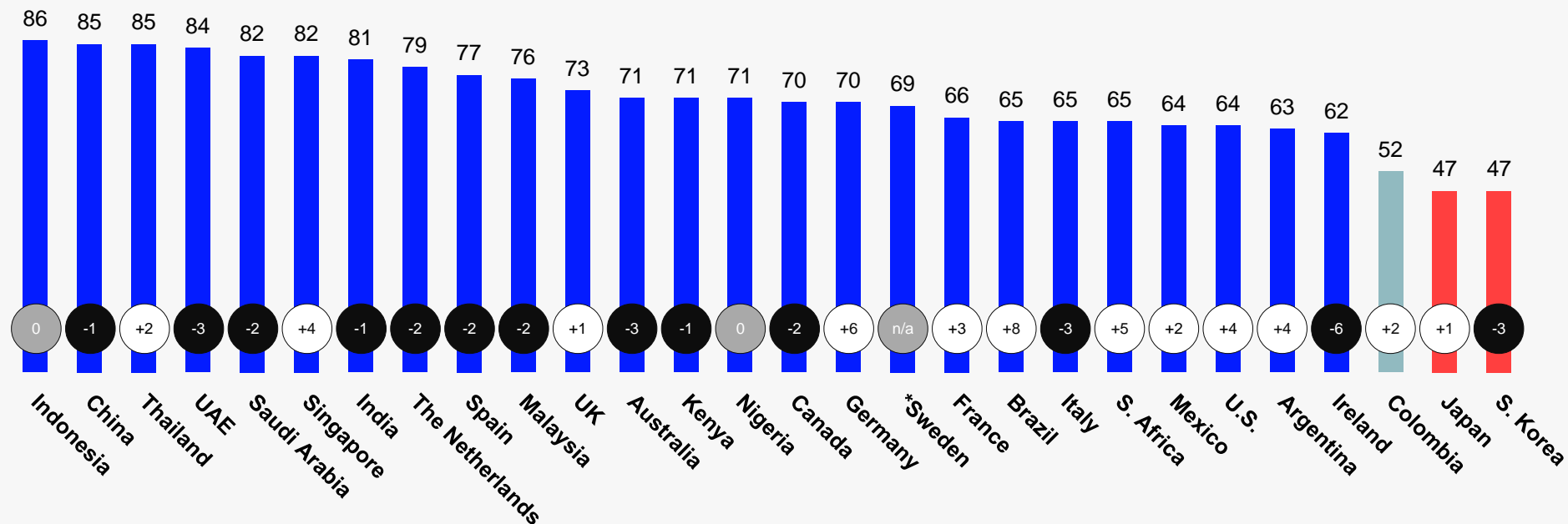
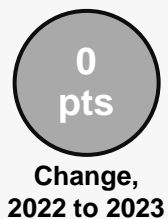
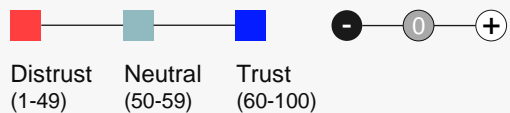


2023 Edelman Trust Barometer. TRU\_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 27-mkt avg and by region. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



# Health Sector Trusted in 25 of 28 Countries (data from January 2023)

Percent trust



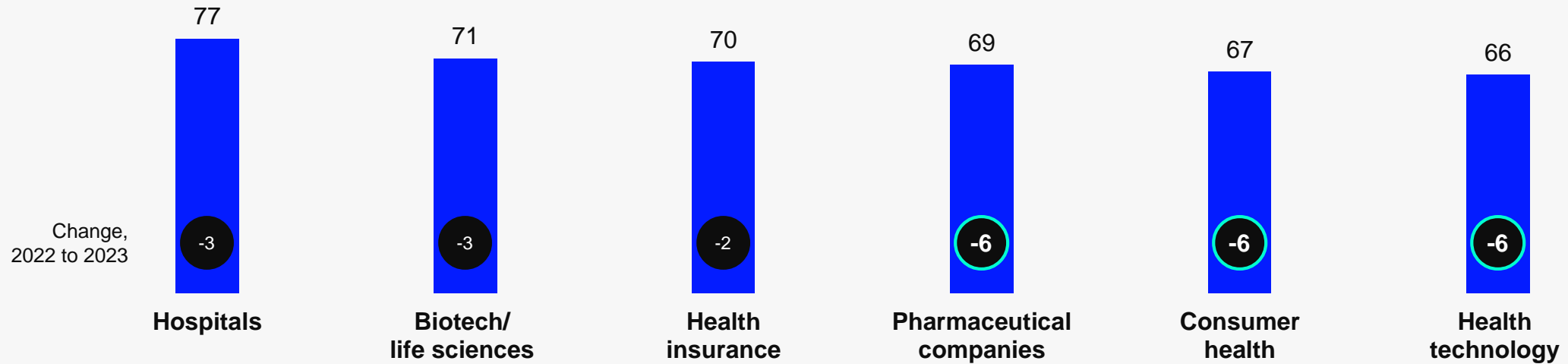
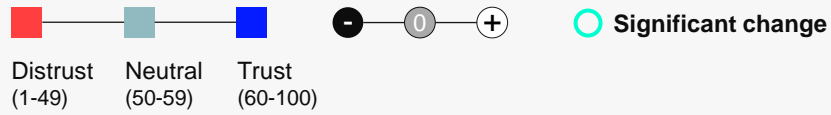
2023 Edelman Trust Barometer. TRU\_IND. Please indicate how much you trust businesses in each of the following industries to do what is right. 9-point scale; top 4 box, trust. Industries shown to half of the sample. General population, 27-mkt avg. \*Sweden is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



# While Trust Decreases Across All Health Subsectors - in APAC All are Still Trusted

Percent trust, in APAC

APAC



2023 Edelman Trust Barometer. TRU\_SUB\_HEA. Now thinking about specific sectors within the health industry, please indicate how much you trust businesses in each of the following sectors to do what is right. 9-point scale; top 4 box, trust. General population, APAC Region. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.

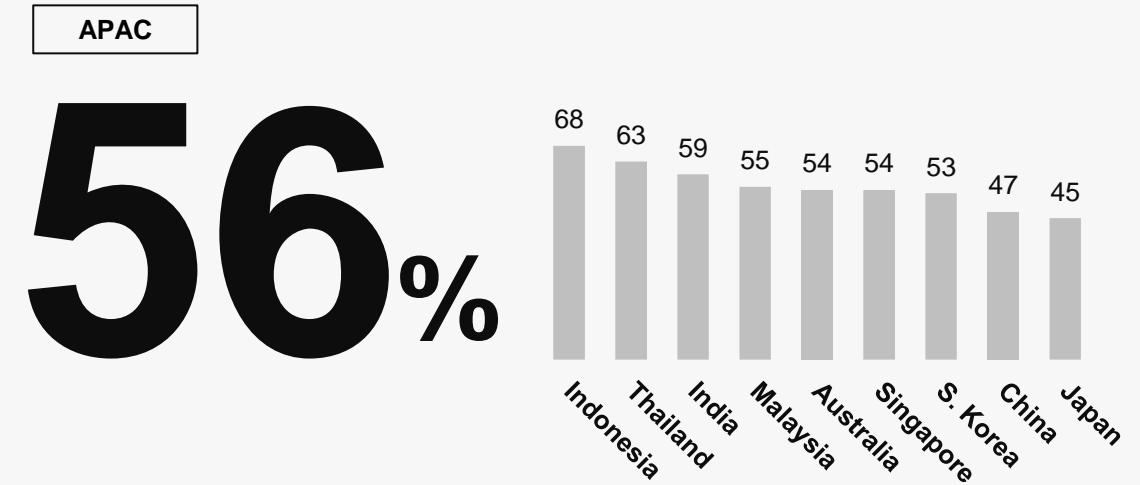
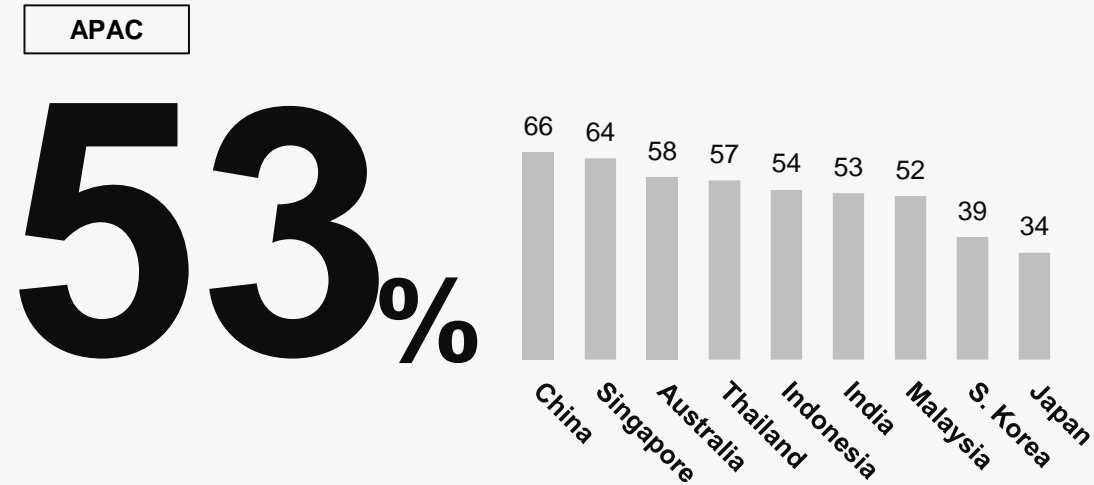


# Most Unsure of Health Companies' Equity and Vision for the Future

Percent who say

Health companies **serve the interests of everyone equally and fairly**

Health companies **have a vision for the future I believe in**



2023 Edelman Trust Barometer. HEA\_PER\_DIM. In thinking about why you do or do not trust technology companies, please specify where you think they fall on the scale between the two opposing descriptions. 11-point scale; top 5 box, positive. Question shown to one-fifth of the sample. General population, APAC region.



# Special Report: Trust and Health



# 2023 Edelman Trust Barometer Special Report: Trust and Health

Methodology

## Annual online survey in its 2nd year

Fieldwork conducted: Mar 2 – Mar 13, 2023

13


Countries

12,785

Respondents

1,000+/-

Respondents per country\*\*

|        |        |  |        |           |          |
|--------|--------|--|--------|-----------|----------|
| Brazil | China  | Germany  | Japan  | *Nigeria  | S. Korea |
| Canada | France |  India | Mexico | S. Africa | UK       |
|        |        |  |        |           | U.S.     |

### Global averages

These vary based on the number of countries surveyed each year:

**GLOBAL 12**

\*Nigeria will not be included in the average until the respondent sample composition stabilizes year over year

**GLOBAL 11 Excludes China**

The sensitive nature of the question prevented this data from being collected in China

### Statistical significance

 **Significant change**

All indicated year-over-year significant changes were determined using a t-test set at a 99%+ confidence level

For more details on global averages and country-specific methodology, please refer to the Technical Appendix

\*\*The sample size varies by country from 805 to 1,002.  
 12-market global data margin of error: General population +/- 1.1 percentage points (n=12,785)  
 Country-specific data margin of error: General population +/- 4.1 to 4.6 percentage points (varies by country based on sample size, n=805 to n=1,002)  
 Margin of error is calculated at the 99% confidence level





# The Shifting Landscape of Global Health



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## Economic Concerns

Inflation tops the list of societal factors that are negatively affecting people's health. Cost and lack of affordability have also increased as barriers to better health.

## Health is defined expansively

Being healthy is not just about physical health, but also about emotional wellbeing, community liveability and supportive relationships. This presents a greater responsibility for all institutions to impact health positively.

## The Dispersion of Authority

While medical professionals, national authorities, and health experts are still seen as trusted health information sources, friends and family have surged in influence.

## Trust and the Empowered Patient

People are more engaged with health information and comparing findings across sources, and they want care that treats them like an equal partner.

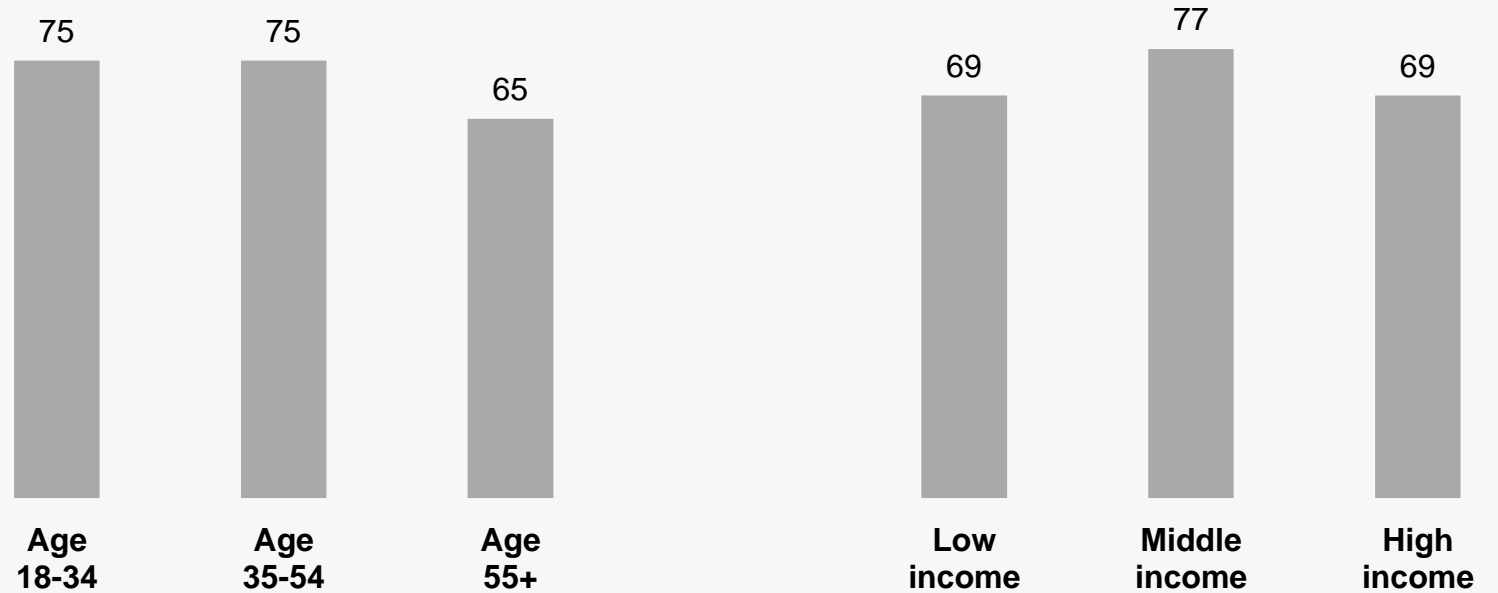
# Economic Concerns Create Health Challenges



# In India, Low and High Income Less Likely to Report Good Health

Percent who say, in India

My overall health is **very good or better**



# In India, Inflation, Pollution, and Climate Change Top List of Societal Factors Making Us Sick

Percent who say

This issue **negatively impacts** my health (net<sup>\*\*</sup>)

| Top 8 of 13                  | GLOBAL 12 | Brazil | Canada | China | France | Germany | India | Japan | Mexico | *Nigeria | S. Africa | S. Korea | UK | U.S. |
|------------------------------|-----------|--------|--------|-------|--------|---------|-------|-------|--------|----------|-----------|----------|----|------|
| <b>Inflation</b>             | 77        | 85     | 75     | 79    | 72     | 68      | 78    | 68    | 79     | 90       | 88        | 85       | 71 | 70   |
| <b>Pandemic restrictions</b> | 75        | 84     | 70     | 82    | 67     | 67      | 76    | 73    | 78     | 77       | 84        | 86       | 69 | 65   |
| Lack of trust                | 67        | 80     | 58     | 83    | 53     | 52      | 76    | 60    | 72     | 82       | 81        | 76       | 53 | 64   |
| Pollution                    | 67        | 76     | 57     | 81    | 58     | 52      | 81    | 54    | 75     | 80       | 77        | 79       | 53 | 58   |
| Polarization                 | 66        | 80     | 57     | 73    | 56     | 52      | 72    | 51    | 68     | 82       | 81        | 80       | 53 | 66   |
| Climate change               | 65        | 71     | 56     | 79    | 59     | 48      | 78    | 61    | 71     | 70       | 71        | 78       | 48 | 57   |
| Burnout                      | 64        | 75     | 56     | 85    | 58     | 47      | 72    | 55    | 71     | 76       | 73        | 79       | 52 | 52   |
| Misinformation               | 64        | 80     | 58     | 82    | 47     | 45      | 75    | 53    | 68     | 80       | 73        | 73       | 51 | 63   |

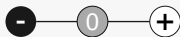


2023 Edelman Trust Barometer Special Report: Trust and Health. SOC\_HEA. For each of the following, please indicate whether it has in some way negatively impacted your personal mental or physical health, the health of your relationships, and/or the livability of your community. Select all that apply for each. General population, 12-mkt avg. \*\*Data shown is a net of codes 1-4; physical health, mental health, health of my relationships, livability of my community. \*Nigeria is not included in the global average.

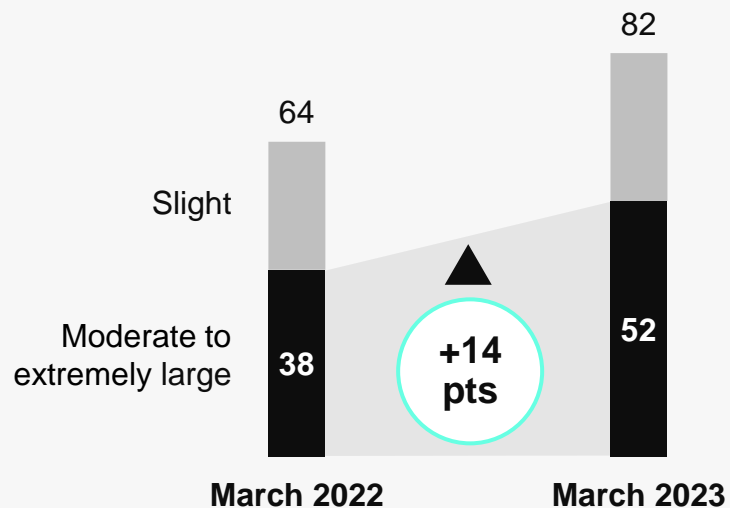


# A majority of Indians report a gap in taking care of their health

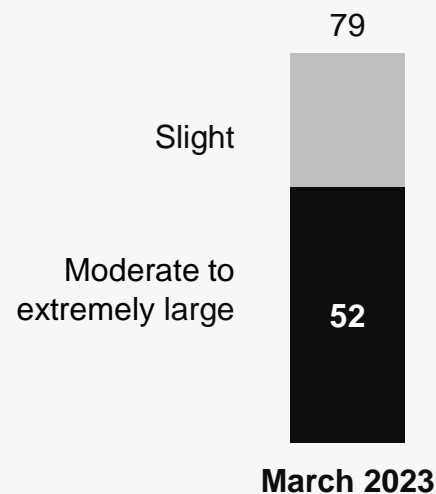
Percent who say

GLOBAL 9  Significant change

There is a **gap** between how well I am taking care of my health vs how well I should be



 India



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_GAP. Which of the following best describes the size of the gap between how well you currently are taking care of your health and how well you should ideally be taking care of your health? 5-point scale; code 2, slight gap; top 3 box, moderate/large/extremely large gap. General population, 9-mkt avg. and India. Data shown is rebased to exclude those who selected "prefer not to answer." Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level. No tracking available because India was not surveyed in March 2022.



# Barriers to Better Health: Cost and Information

Among the 79% in India who say there is a gap between how well they are currently taking care of their health vs how well they should be, percent who say

— 0 — +      Significant change

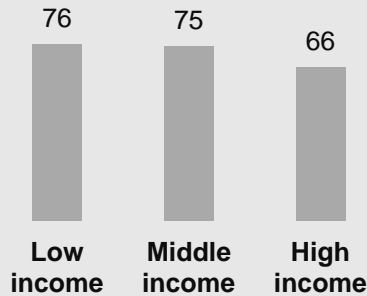
This plays a **large/very large** role in keeping me from taking better care of my health

## Cost

Healthy options cost too much  
Cannot afford good healthcare  
Cannot afford treatments

10pt gap between those with high and low income

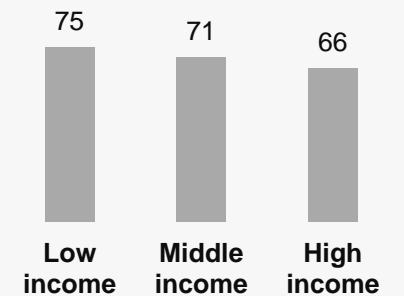
# 73%



## Information

Lack of information  
Changing health recommendations  
Contradictory expert advice

# 71%



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_BAR. How big a role does each of the following have in keeping you from closing the gap between how well you currently are taking care of your health and how well you should ideally be taking care of your health? 5-point scale; top 2 box, large role. Question asked of those who said there is a slight or larger gap (HEA\_GAP/2-5). General population, India, and by income. "Cost" is a net of attributes 1-3; "Information" is a net of attributes 4-6. Data shown on slide is rebased to exclude those who selected "prefer not to answer." Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



# Health Now Bigger Than Healthcare



# My Health Is More Than My Physical Health

Percent who say, in India

When I think about being “healthy,” I think about...

Net dimensions:

## Mental health

91%

- Feeling happy
- Can manage negative emotions

## Physical health

83%

- Can do important activities
- No sickness or injury
- Can manage my physical health

## Social health

85%

- Have a person I can speak freely to
- People care about me
- Not discriminated against

## Community livability

81%

- Clean, safe, peaceful community
- Healthy planet

# 67%

say all four components are dimensions of my “health”

*Only 1% say being healthy is just about physical health*

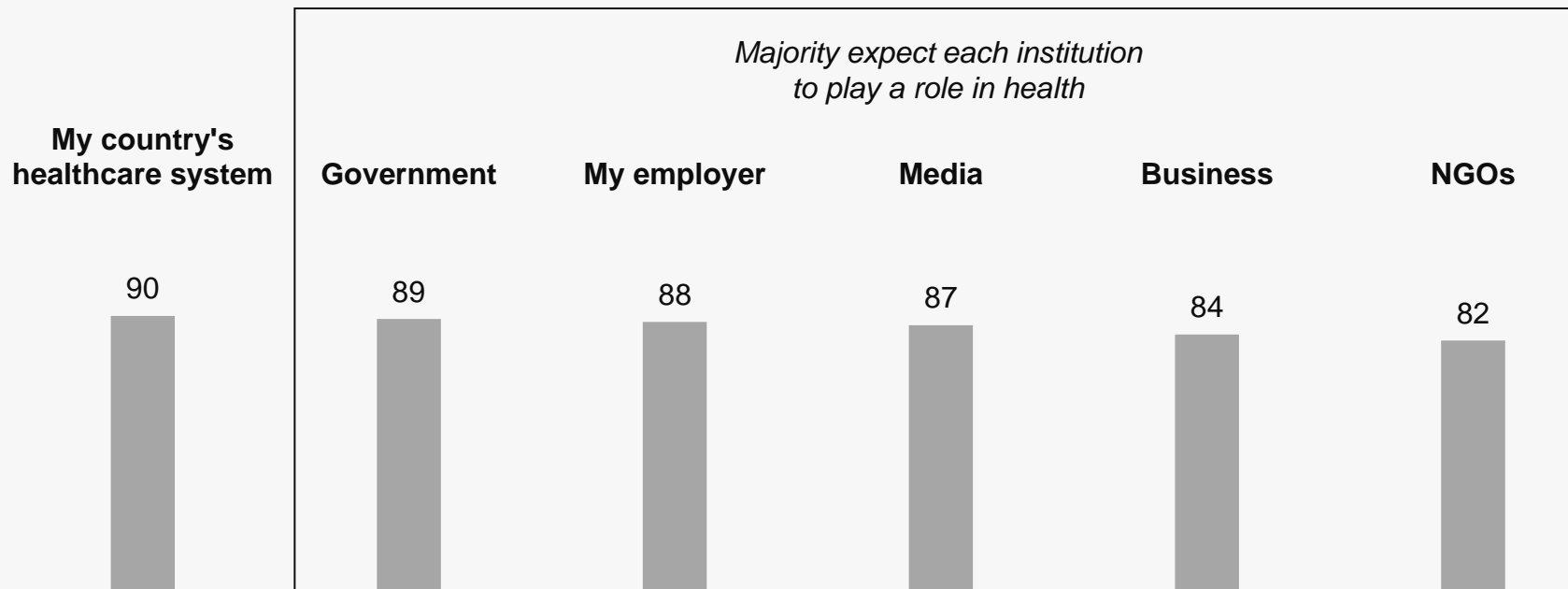




# Beyond the Healthcare System: All Institutions Expected to Keep Us Healthy

Percent who say, in India

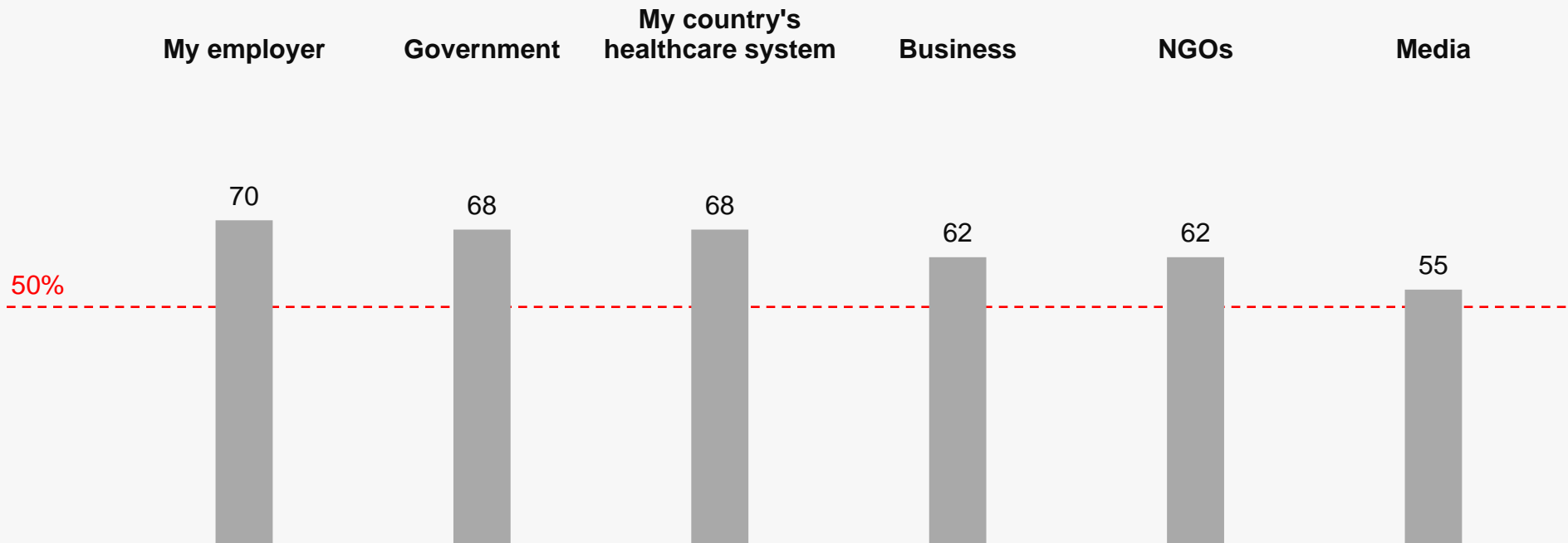
I expect each to **play a meaningful role** in making sure I am as healthy as possible



# In India, My Employer On Par With My Healthcare System in Keeping Me Healthy

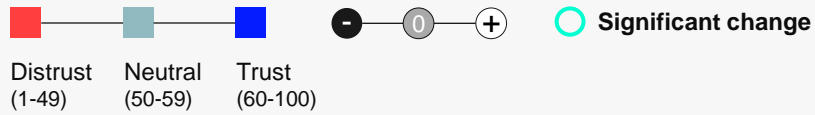
Percent who say, in India

This institution is **doing well** in making sure I am as **healthy as possible**

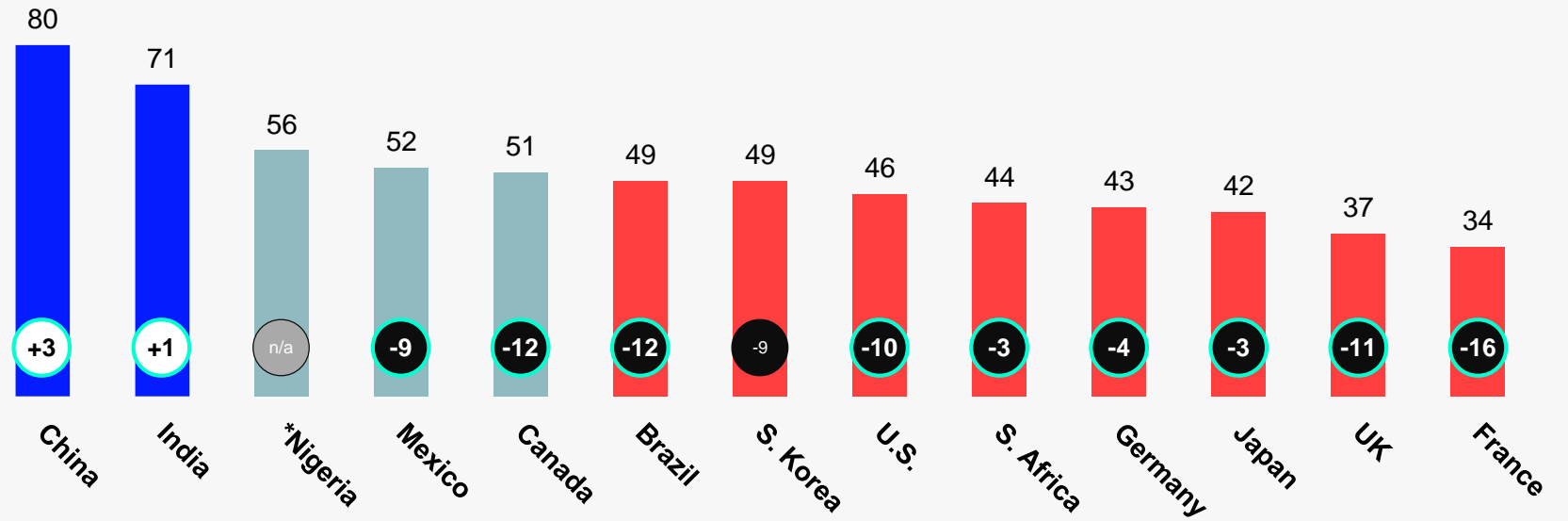
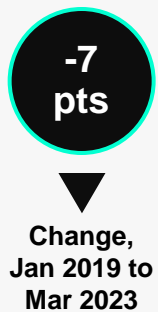


# In India, Media Trusted to Report on Healthcare

Percent who say



I trust the media to report accurate information about healthcare



2023 Edelman Trust Barometer Special Report: Trust and Health. DRV\_HEA\_REP. How much do you trust the media to report accurate information about healthcare, such as diseases, treatments and prevention? 9-point scale; top 4 box, trust. Question asked of half the sample. General population, 12-mkt avg. \*Nigeria is not included in the global average. Year-over-year changes were tested for significance using a t-test set at the 99%+ confidence level.



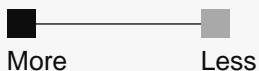
# Rise in Peer Voices and Empowered Patients



# I'm Now Educating Myself More About Health

Percent who say, in India

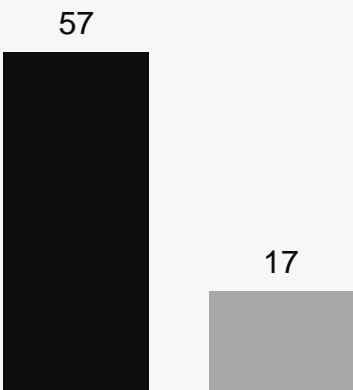
Since before the beginning of the pandemic, I have been doing this more or less



**Multiplier,**  
more vs less likely to do this  
since before the pandemic

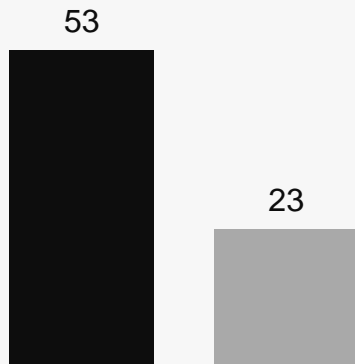
**Educating myself about  
health issues**

**3.5x**



**Verifying whether the health  
information I see is true**

**2.5x**

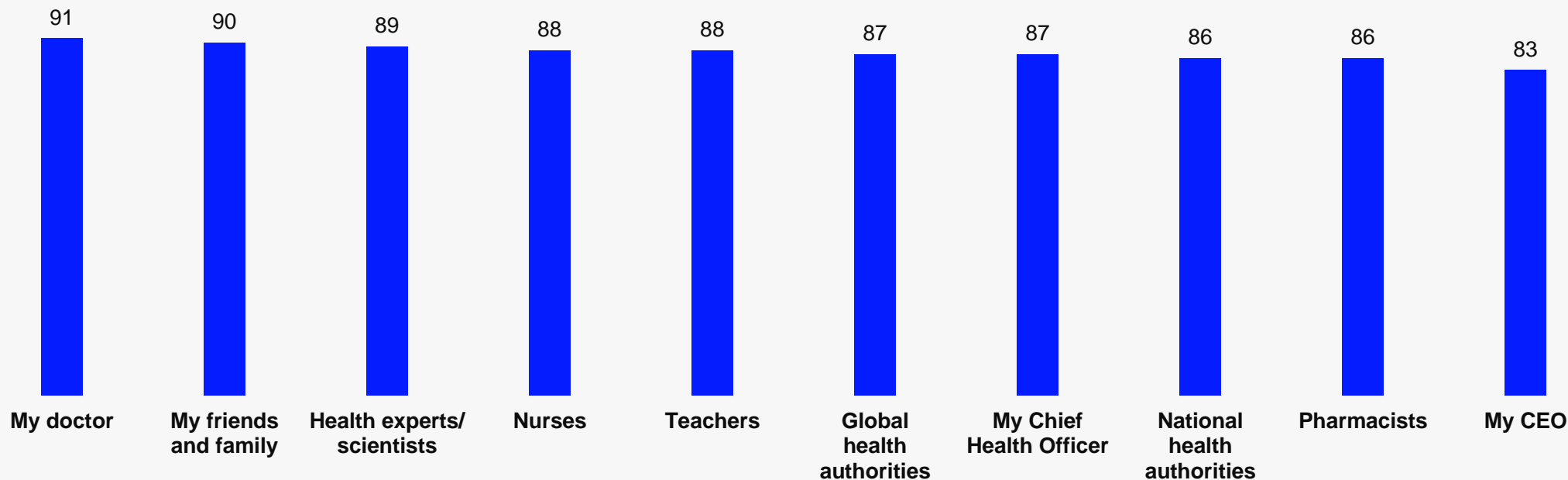
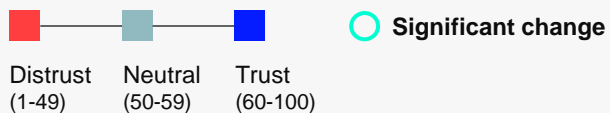


2023 Edelman Trust Barometer Special Report: Trust and Health. PAN\_EFF. For each of the following, please indicate whether you are doing this more, less, or the same amount as you were before the beginning of the pandemic. 3-point scale; code 1, more, and code 2, less. Question asked of half the sample. General population, India. The multipliers are rounded to the nearest .5.



# Health Issues: Trust in Peer Voices on Par with Medical Experts

Percent trust to tell the truth about health issues and about how to best protect the health of the public, in India



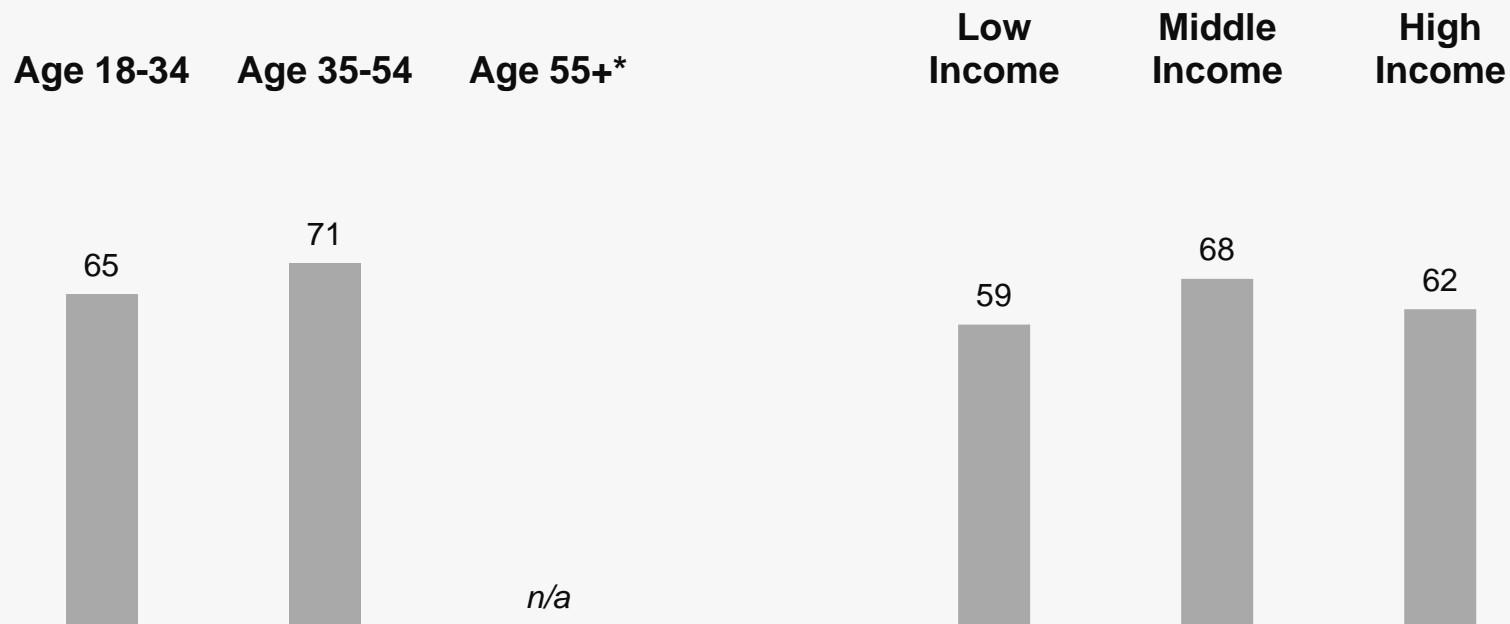
2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_TRU\_PEP. Below is a list of categories of people. For each one, please indicate how much you trust that group of people to tell you the truth about health issues and about how best to protect the health of the public. 9-point scale; top 4 box, trust. General population, India. "My Chief Health Officer" and "my CEO" only asked of those who are an employee of an organization (Q43/1). Data shown is rebased to exclude those who selected "don't know/not applicable."



# Many Believe the Average Person Can Know as Much as a Doctor

Percent who agree, in India

The average person who has done their **own research** is **just as knowledgeable** on most health matters **as doctors**

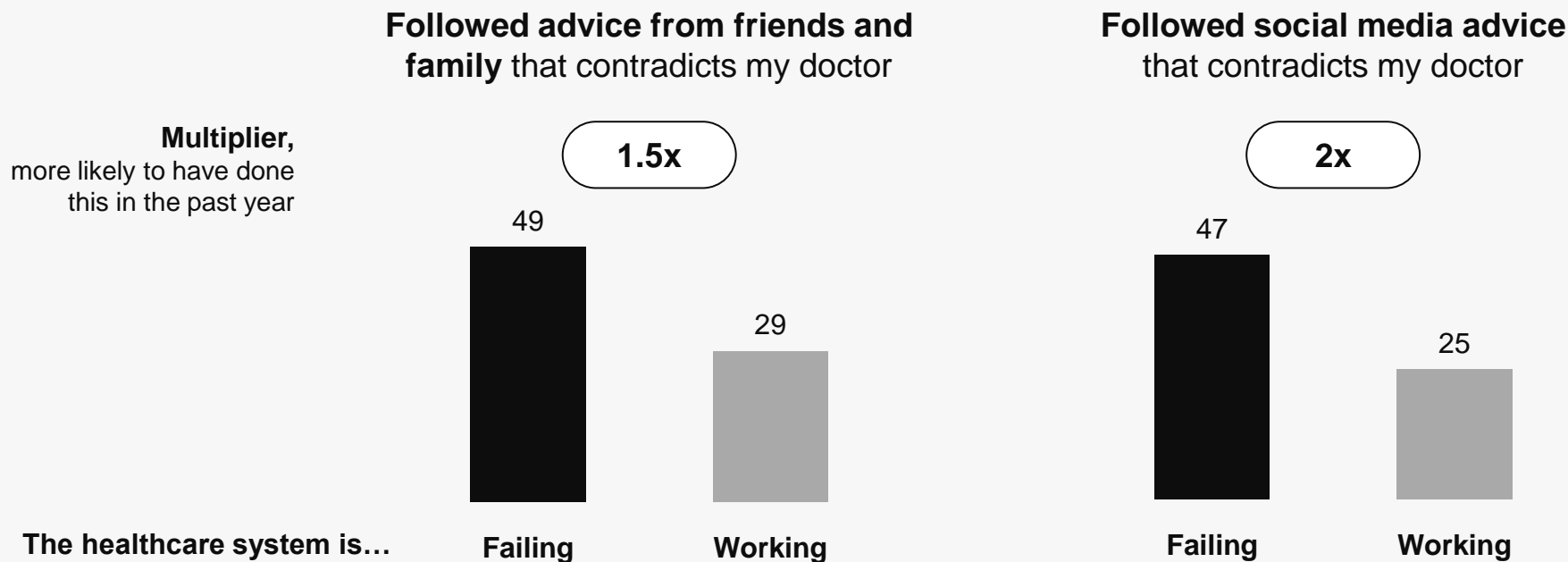


# To Follow Doctors, Empowered Patients Need Confidence in the Healthcare System

Among the 34% who agree the average person can be as knowledgeable as doctors, percent who say

GLOBAL 12

In the past year, I have...



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_BHV. Have you done any of the following within the past year? 3-point scale; code 1, yes. General population, 12-mkt avg., by belief in the healthcare system scale, among those who agree the average person who has done their own research is just as knowledgeable on most health matters as doctors (HEA\_AGR11/T4B). The multipliers are rounded to the nearest .5. For a complete definition of how we measured belief in the healthcare system, please refer to our Technical Appendix.





# Build a Healthcare System I Can Trust



# Providers: Treat Me With My Whole Self in Mind

Percent who say each is necessary to feel well cared for by a healthcare provider, in India

## Treat my medical needs (net)

- Give me medications I need*
- Follow up with me after seeing me*
- No long wait time*
- Not rushed through my appointment*

78%

## Ease my concerns (net)

- Listen to me, take my concerns seriously*
- Use terminology I can easily understand*
- Put me at ease if I am anxious*
- Do not make me feel judged*

79%

## Care about me as an individual (net)

- Understand the health concerns of people like me*
- Recommendations are compatible with my life*
- Ask questions about my life*

76%



# Health Experts: Talk To Me Like I'm Your Equal Partner

Percent who say, in India

If health experts are trying to get me to change my behavior, it is very/extremely important they do each of the following

**Include me in the science**

*Show the recommendation was based on data collected from people like me*

**72%**

**Show how it fits my life**

*Acknowledge the burden the recommended change may present in my life*

**75%**

**Give me a voice**

*Give me a way to ask questions and voice my concerns*

**75%**



# Bridging the Trust Divide: Embrace the Voices They Will Hear

Among those with lower vs higher trust in the health ecosystem, sources most likely to be trusted or believed and most convincing recommendation style

GLOBAL 12

| Among those with <b>lower trust</b> in the health ecosystem |   | Among those with <b>higher trust</b> in the health ecosystem |
|---|---|--|
| Friends and family  | <b>Most trusted source</b> of health information      | My doctor  |
| My employer   | <b>Most believable channel</b> for health information | National health authorities                                  |
| Show credentials <i>and</i> Let me ask questions            | <b>Most convincing</b> health expert recommendations  | Use clear, informal language                                 |



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_TRU\_PEP. Below is a list of categories of people. For each one, please indicate how much you trust that group of people to tell you the truth about health issues and about how best to protect the health of the public. 9-point scale; top 4 box, trust. Data shown is rebased to exclude those who selected "don't know/not applicable." HEAR\_TIME\_HEA. When you see a new piece of information or a news story about a health or healthcare issue in each of the following information sources, how many times do you need to see it or hear it repeated in that same type of information source before you believe it is really true? Question asked of half of the sample; "Employer communications" only shown to those who are an employee of an organization (Q43/1). Data is a net of codes 1-3, zero/once/twice. INF\_REL. If health experts want to get you to change your behavior to help you improve or protect your own health and the health of those around you, how important is it that they do each of the following? 5-point scale; top 2 box, very/extremely important. Question asked of half of the sample. General population, 12-mkt avg., by level of trust in health ecosystem. For full details on how the Health Ecosystem Trust scale was built, please refer to the Technical Appendix.



# CEOs and Employers: Invest in Our Health

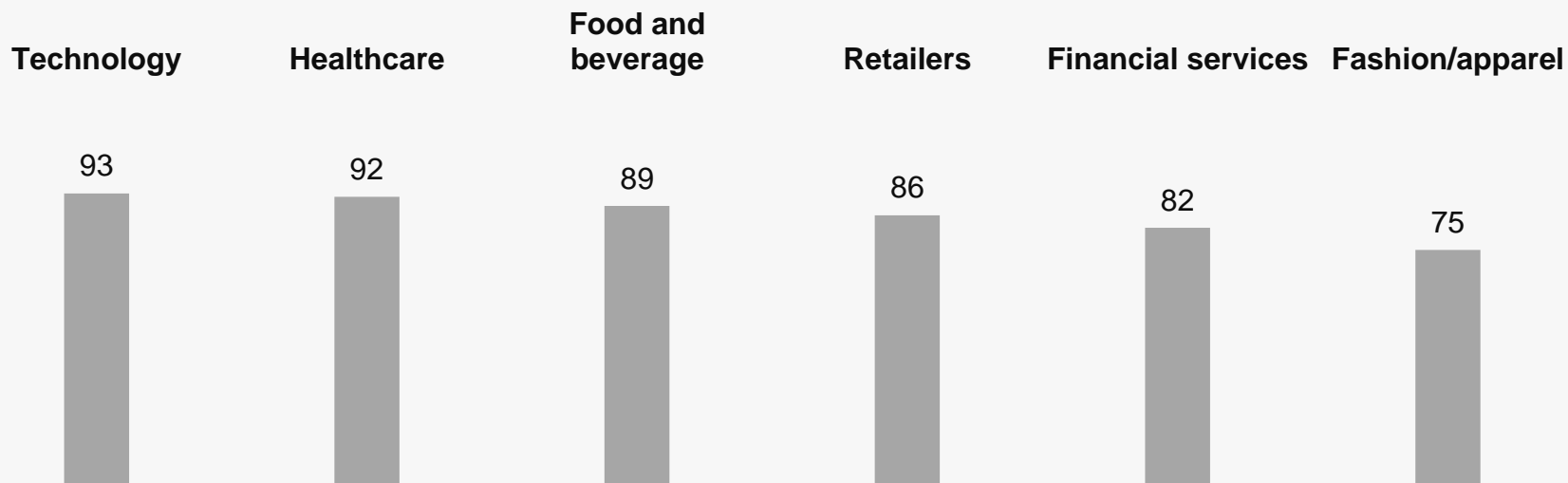


# Businesses Across Sectors Must Play a Meaningful Role in My Health

Percent who say, in India

I expect each type of company to **play a meaningful role** in making sure I am as healthy as possible

*Majority expect companies across sectors to keep them healthy*



# Business: Address the Societal Factors That Affect Our Health

Percent who say, in India

## To improve people's health, business must:

Improve health of your **local communities**



Provide **trustworthy health information**



Address health issues such as **climate or inequality**



**Convene stakeholders** to improve healthcare



# Brands: Optimize For Health Across Your Products and Operations

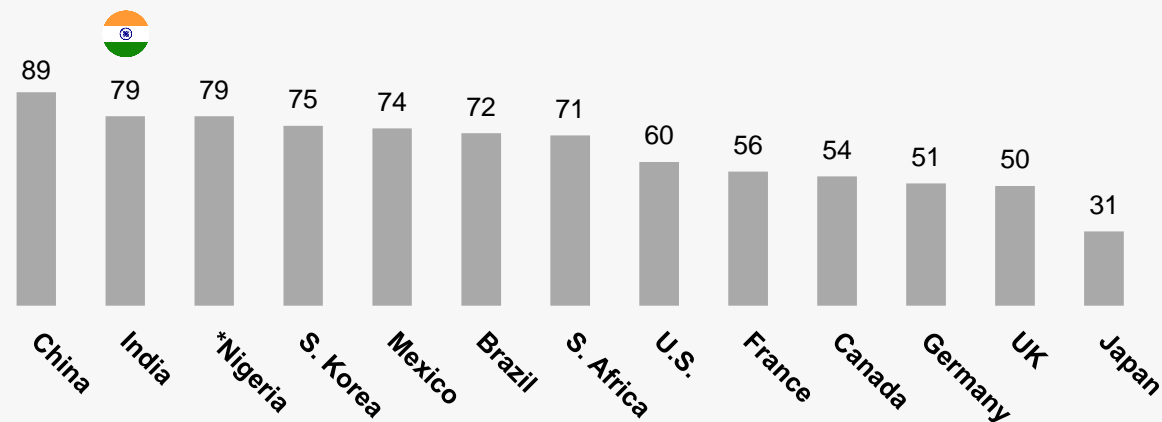
Percent who say

When deciding which brands to buy, I consider the **impact the brand, its products, and its business practices** have on people's health

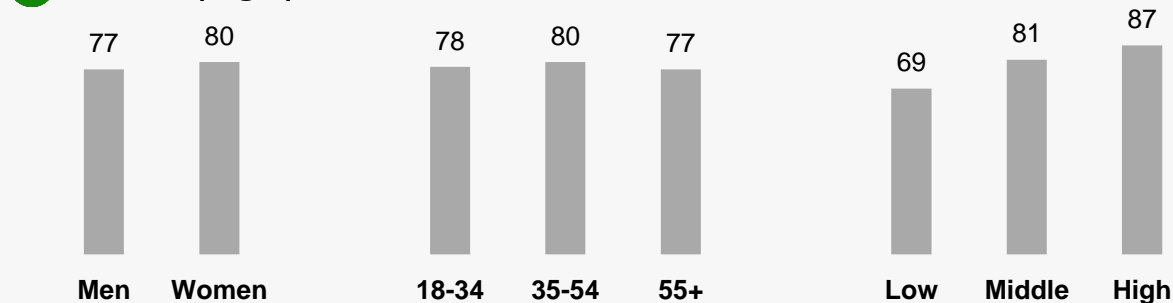
GLOBAL 12

# 64%

Market



Gender | Age | Income



2023 Edelman Trust Barometer Special Report: Trust and Health. HEA\_DR\_BUY. When deciding which brands to buy, how often do you take into consideration the impact that the brand, its products, and its business practices are having on people's health, including your own, its employees, and the communities in which the brand operates? 5-point scale; top 3 box, sometimes/usually/always. General population, 12-mkt avg., and by India demographics. \*Nigeria is not included in the global average.





# CEOs: Show Me That You Value Mental Health and Work-Life Boundaries

Percent of employees who say, in India

To improve their employees' health:

**My CEO must talk about the importance of mental health in the workplace**

**89%**

**My CEO must model healthy behavior, such as respecting boundaries between work and non-work and taking all their PTO**

**86%**

**My employer must implement policies to prevent burnout**

**90%**



# Special Report: Trust and Health

**1**

## Address health inequalities

Cost is the number one barrier keeping people from being as healthy as they want to be. Address the societal issues and inequities that disproportionately affect those with lower access to affordable care.

**2**

## Leverage the dispersion of authority

Friends and family have grown as trusted on health matters as domain experts. Rather than fighting this trend, incorporate it into your approach.

**3**

## Invest in consumer and doctor education

Consumers need to understand how to safely and effectively use the information they find online. Doctors require additional skills that make patients feel like equal partners and well cared for. Invest in educational efforts to build equity and improve health outcomes.

**4**

## Optimize business around health

Health has a bottom-line impact on consumer decisions for businesses across all sectors. Make health central to your products and business operations.



**Thank You**

