Understanding trust in self-care

GLOBAL
SELF-CARE
FEDERATION

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FOREWORD

As the Global Self-Care Federation celebrates its 50th anniversary, we look at the progress we've made over the past five decades to find our industry at an important juncture. The self-care industry has never been better placed to address the growing need for healthcare solutions around the globe. The goal of the trust audit was to help us understand the landscape in which we work, and to support our efforts to further the potential of self-care as part of an integrated healthcare system.

Self-care is an increasingly important component of healthcare delivery, providing greater choice, care, and value to consumers, while easing the burden of work on traditional healthcare systems.

Trust is the bedrock of the self-care industry and a key determinant in successful self-care delivery. Consumers must trust that the information they receive is reliable, and that the products they use to self-medicate are appropriate to treat their ailments.

As the Global Self-Care Federation of national, regional, multinational associations and consumer healthcare corporations on all continents, we are committed to a world where self-care increasingly contributes to better health and healthcare outcomes for all.

To help us support this goal, we commissioned Echo Research to conduct a Trust Audit to:

- Assess trust in the self-care industry for both consumers and stakeholders;

- Measure the six drivers of trust (transparency, safety, efficacy, pricing, responsible use, and responsible marketing)

- Identify the most trusted sources of information associated with self-care; and

- Consider what GSCF can do to improve trust in the self-care industry.

We would like to thank all our participants who generously gave up their time to take part in the interview process — your thoughts and expertise have been instrumental in bringing substance to this report.

We are pleased to share a summary of the findings.

Judy Stenmark
Director General
Global Self-Care Federation

HOW THE STUDY WAS DONE

Global reputation research specialists, Echo Research, conducted a fully integrated and bespoke audit of reputation and trust in the global self-care industry that consisted of:

- 102 telephone interviews with professional **stakeholders** from global and pan-regional organisations

- 7,088 online **consumer** interviews across 8 countries worldwide

- **Global social listening** to benchmark media sentiment.

The research was carried between January and April 2020, with a retrospective view of social listening from digital content published between May and November 2019.

This report summarises key findings from stakeholder, consumer and global social listening elements of this research.

The findings report on the self-care industry as a whole encompassing over-the counter medicines (OTC), vitamins and dietary supplements, diagnostics devices and medical/other devices.
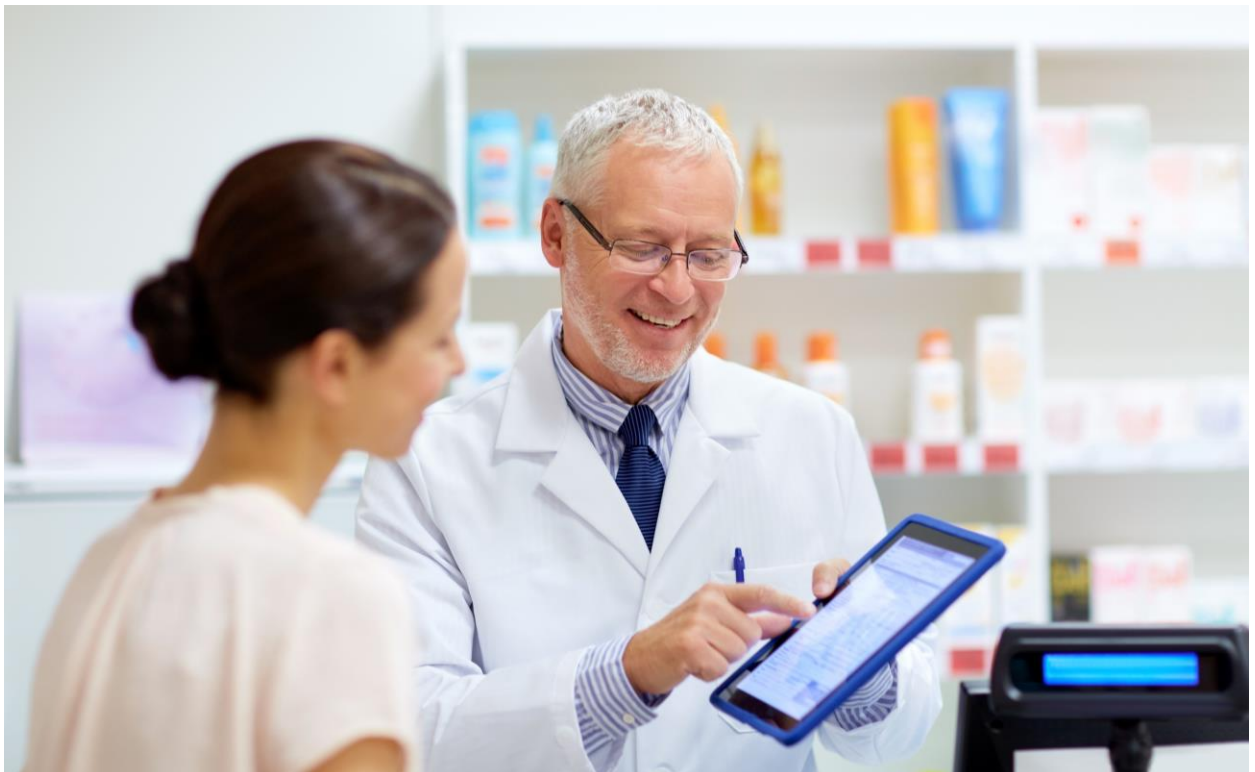
SUMMARY

Key findings

- Self-care, as a term, is widely understood to mean people being empowered to take responsibility for their physical and mental health.

- While consumer trust in the self-care industry is high, a fifth of professional stakeholders say they mistrust the industry.

- Stakeholders trust the self-care industry in Europe the most, and in Africa the least.

- Product safety, efficacy, regulation and societal benefits are positive attributes of the self-care industry.

- Stakeholders recognise the benefits of self-care for healthcare systems under pressure.

- In terms of the limited concerns raised, stakeholders worry about irresponsible marketing by manufacturers and irresponsible product use.

- The most trusted information sources on self-care for stakeholders are scientific journals. For consumers, it is advice from healthcare professionals.

- Stakeholders would like to see the self-care industry invest in more consumer education and collaboration and to further improve standards of ethics, regulation and transparency in the industry.

How we are acting on these findings

As a result of this study, the Global Self-Care Federation has developed an action plan for improving trust in the self-care industry.

This includes:

- **Stakeholder engagement:** developing existing relationships (such as GSCF's long-standing relations with the World Health Organization) and building new ones.

- **Consumer education:** developing and promoting a hub for consumer education resources from GSCF members and other recognised bodies.

- **GSCF Code of Ethics:** developing and implementing a GSCF code of ethics for members to uphold and recognise as best practice.

- **Scientific evidence for self-care:** publishing and communicating robust scientific evidence, including on the public health and economic value of self-care.

- **Strategy for Africa:** continuing the work of GSCF's Africa working group to engage with national governments, regulatory bodies and AMRH (African Medicines Regulatory Harmonization) to embed self-care in national healthcare plans and harmonise standards.

PERCEPTIONS OF THE TERM SELF-CARE

Empowerment and responsibility are the defining themes of self-care

When asked to define the term self-care, themes such as empowerment and responsibility proved central to stakeholders' understanding.

In summary, it is "*people deciding what to do for their health*" – be it mental or physical – and "*taking action to implement it.*" NGO

This includes "*personal knowledge of how to care for myself and how to use tools, knowledge and resources to take care of myself.*" HCP representative body

In many ways, self-care was linked to taking unnecessary pressure off medical professionals by acting independently: "*trying to treat some illnesses and discomforts without visiting a practitioner of any sort.*" Regulator

But it was also viewed as a joint venture between patients and healthcare practitioners: "*empowered patients having shared responsibility with health professionals in order to have the healthy outcomes they desire.*" Patient advocacy group

DEFINITION OF THE TERM 'SELF-CARE'

Empowered patients (taking an active role in their own health)
80%

Managing health without medical professional
25%

Seeking/ sharing health knowledge
21%

Sharing responsibility for health
17%

Prevention of illness/ maintenance of wellness
16%

Q. How would you define the term 'self-care'? What does the term mean to you?
Base: All stakeholders(n=102). Open question – verbatim responses

TRUST IN THE SELF-CARE INDUSTRY OVERALL

Consumer trust in self-care is high, stakeholder trust is weaker

Three-quarters of all consumers (74%) trust the self-care industry. Professional stakeholders are less convinced with trust levels of 43% and just over one fifth (21%) saying they mistrust the self-care industry. Media coverage was largely factual and informative (59%), with one-fifth being negative (22%).

Four self-care industry sectors were assessed to establish overall trust levels. Of these, stakeholders and consumers both trust medical devices the most due to these being widely used, effective and easy to apply: *"They're very tangible and practical and the level of harm that can be done with them is low in comparison with oral medications".* HCP representative body

Over-the-counter medicines (OTC) was the second most trusted sector for stakeholders and consumers as the products *"are scrutinised in terms of efficacy and they should not harm people".* Patient advocacy group

The Vitamins and dietary/food supplements sector was the least trusted among professional stakeholders. The principle drawbacks were perceived as irresponsible marketing when manufacturers make *"excessive claims for their products".* Policymaker

Lack of impact was also raised: *"it's the diet that's important not the supplement."* NGO

LEVEL OF TRUST IN SELF-CARE INDUSTRY

■ Trust ■ Neutral ■ Distrust ■ Don't know
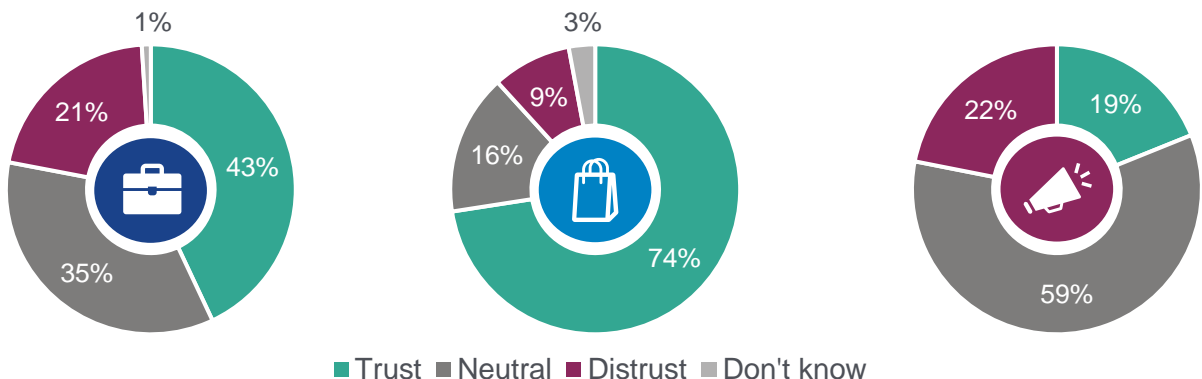
Q. To what extent do you trust these healthcare industry sectors?
Base: n= All stakeholders (n=102), All consumers (n=7088), Media sentiment 2 million results
Charts show the self-care industry average across all sectors

TRUST IN THE SELF-CARE INDUSTRY BY REGION

Self-care industry is most trusted in Europe and least trusted in Africa

Europe is the most trusted region for self-care while Africa/Middle East and Asia are the least trusted by professional stakeholders.

The rigour, application and use of regulation came through as the main differentiator driving the varying degrees of trust across regions.

Europe is most trusted due to its *"experience, testing and knowledge and strong co-vigilance across countries through the regulation systems."* HCP representative body

Similarly, the self-care industry in North America *"makes sure the systems and decisions are based on experience and testing and knowledge".* HCP representative body

On the other hand, Asia is criticised for having *"huge production in a very weakly regulated market."* Policymaker
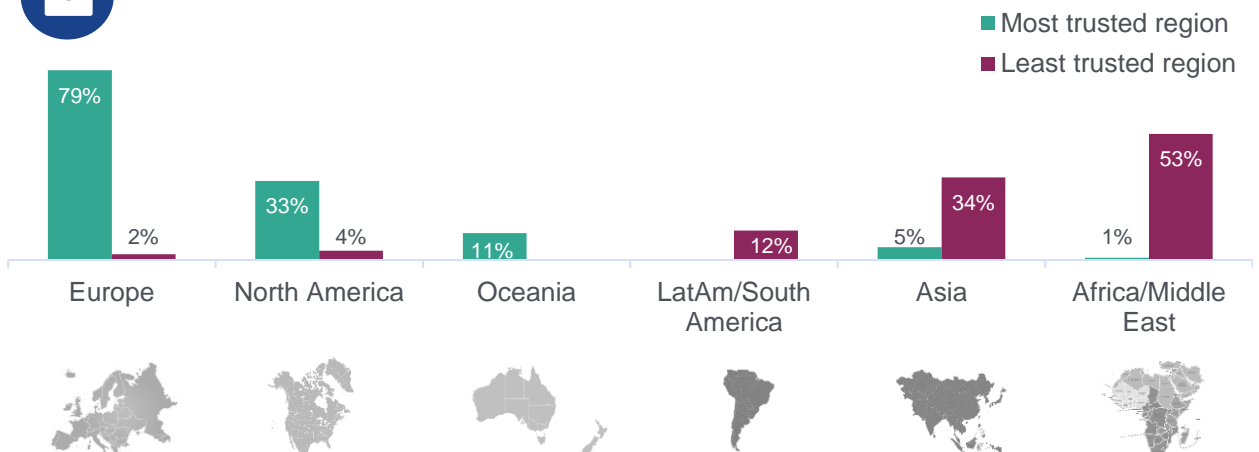
Africa/Middle East is least trusted due to lack of regulation and weak capacity. *"There is least regulation here."* Trade body

"Regulators' capacity to enforce standards and norms is very weak." Patient advocacy group

Negative media reports were also most prevalent in Africa.

SELF-CARE INDUSTRIES MOST AND LEAST TRUSTED REGIONS

- ■ Most trusted region
- ■ Least trusted region

Region	Most trusted region	Least trusted region
Europe	79%	2%
North America	33%	4%
Oceania	11%	
LatAm/South America		12%
Asia	5%	34%
Africa/Middle East	1%	53%

Q. Which region is most trusted/least trusted for self-care? Base: All stakeholders (n=102)

DRIVERS OF TRUST IN THE SELF-CARE INDUSTRY

Product safety and efficacy are the main drivers of trust

Overall, the self-care industry is seen as safe, effective and well-regulated.

Consumers view most attributes positively but stakeholders were more critical, especially on responsible promotion and responsible use of products. These also drew the greatest amount of criticism in the media.

"There are concerns around the standard of evidence and the extent to which they back up marketing claims." Regulator
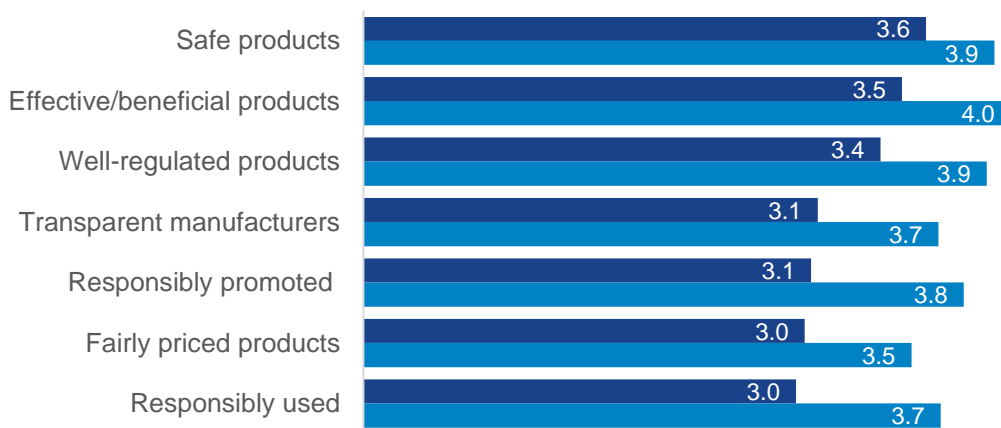
"People often use products for things that they weren't designed for." Patient advocacy group

Key driver analysis shows that for stakeholders, product safety is the single most important driver of trust in the self-care industry. For consumers, it is product efficacy that is most important.

That self-care benefits individuals' health and society in general is an important driver of trust for consumers and stakeholders alike.

Stakeholders also recognise that the self-care industry benefits healthcare systems: *"Takes pressure off healthcare systems as people can get hold of devices or medicines."* Patient advocacy group

SELF-CARE INDUSTRY TRUST DRIVERS (mean score)

Driver	Stakeholders	Consumers
Safe products	3.6	3.9
Effective/beneficial products	3.5	4.0
Well-regulated products	3.4	3.9
Transparent manufacturers	3.1	3.7
Responsibly promoted	3.1	3.8
Fairly priced products	3.0	3.5
Responsibly used	3.0	3.7

Q. Where 5 is strongly agree and 1 is strongly disagree, please indicate the extent to which you agree or disagree with each statement. Base: n= All stakeholders (n=102), All consumers (n=7088)
Self-care industry average

TRUSTED SOURCES

Scientific journals for stakeholders and healthcare professionals for consumers

When asked to name their most trusted sources for information relating to the self-care industry, peer-reviewed scientific journals came out top for stakeholders.

"A key consideration for anything that's medicinal is that it must be evidence based. …Evidence-based assessments and research on products are more likely to be found in scientific style journals than on current affairs television." HCP representative body

Recognised industry bodies, NGOs and governmental organisations were cited by a third of stakeholders as a trusted source.
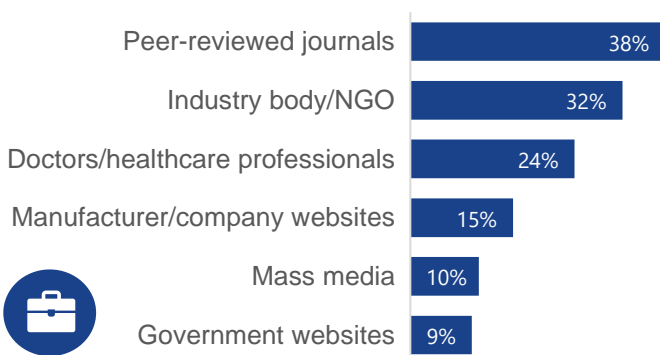
"I trust WHO and other similar national organisations e.g. CDC, FDA in US and their equivalent in developed countries." NGO

For consumers, healthcare practitioners were ranked highest as the most trusted sources for information on managing their own health.

"I trust my doctor's expertise." Consumer

"On a personal level I trust the pharmacists." NGO

MOST TRUSTED SOURCES FOR INFORMATION ON SELF-CARE

Source	%
Peer-reviewed journals	38%
Industry body/NGO	32%
Doctors/healthcare professionals	24%
Manufacturer/company websites	15%
Mass media	10%
Government websites	9%

Average rank

Source	Rank
Doctor	1
Pharmacist	2
Nurse	3
Friends or family	4
Companies that manfacture medicines	5
Patient groups or charities	6
Health insurance companies	7
Government	8
Media	9
Social media	10

Q. What are your most trusted sources for information relating to the self-care industry? Base: All stakeholders (n=102). Based on verbatim responses pen question – verbatim responses

Q. Which of the following sources do you trust the most for information and advice on managing your own health? Base: All consumers (n=7088). Ranked most to least trusted

IMPROVING TRUST IN SELF-CARE

Stakeholder suggestions for improving trust in the self-care industry

Consumer education	*"Massive public education. …encourage its members to engage the public more in education not just advertising."* HCP representative body *"Really contextualise the products/industry…[show] evidence as well as stories of how patients improve or benefit from the product."* Policymaker
Awareness	*"GCSF should have a big role in promoting, monitoring and reporting on self-care related products/industry."* NGO *"Position the self care industry as partners in the overall challenge to improve health."* Policymaker
Collaboration	*"Run dialogue and partnerships with other relevant organisations such as WHO and other health professional groups."* HCP representative body *"Work with the professionals who see the patients to ensure everyone is working as one voice."* Other stakeholder
Ethics and regulation	*"They should have a widely known code of ethics and highlight the work they do."* Trade body *"…help regulation in unregulated markets."* Policymaker
Transparency	*"Transparency is always key. I think that people trust brands that are upright and honest and if there is an issue, talk about it."* NGO *"All the information must be transparent and easily available and shared as easily as possible."* HCP representative body

Q. What could the GSCF and its members do to improve trust in the self-care industry? Base: All stakeholders (n=102)

ABOUT US

GLOBAL SELF-CARE FEDERATION

The Global Self-Care Federation exists to create a healthier world through better self-care. We represent associations and manufacturers in the self-care industry, working closely with our members and relevant stakeholder groups to ensure evidence-based self-care products and solutions are recognized as key contributors to health for individuals and systems worldwide.

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Echo Research is an independent, global leader in communications, brand and reputation research. We undertake qualitative / quantitative research and media content analysis globally and provide actionable insights into reputation and brand to drive strategic outcomes.

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