



The Patient's Perspective: Today's Digital Health Consumer

Background

Demonstrate how consumers use the Internet and search in their quest for health information and how the information they find online ultimately impacts patient outcomes.

Research Objectives:

- Understand how consumers use the Internet to find health information
- Outline how consumers use search for their health needs
- Determine the impact of online searches
- Evaluate the overall impact of their searches on patient outcomes

The Internet Drives Patients to Take Action in Managing Their Health.

Study Methodology

Vendor: OTX: Online Testing Exchange

Survey field dates: December 18, 2009 – December 27, 2009

Number of Interviews: 5,001 completes from an online survey, which includes consumers searching for themselves or someone they care for.

In order to qualify for the survey, a respondent had to:

- Reside in the United States
- Be 18+ years old
- Have used an online source to gather information on a health-related questions or concern in the past 12 months
- Have queried on one of the 39 health conditions specified.

The Patient's Journey to Action

1 First Stop: Digital Housecall

2 Search: the First, Second, Third, & Fourth Opinions

3 Video: Show & Tell

4 The Internet is Good for Patient Health

First Stop: Digital Housecall



Trust in Online Health Resources is Skyrocketing



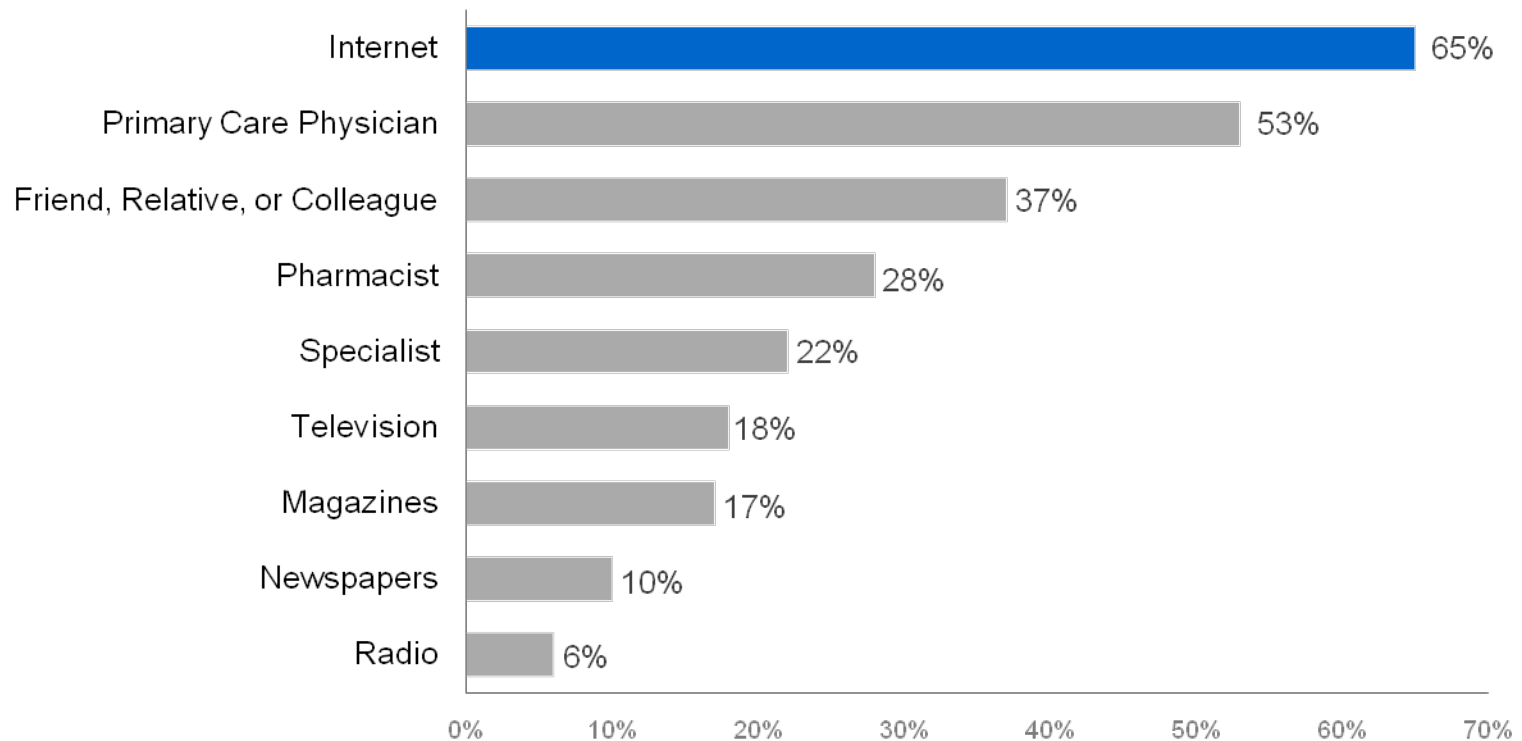
Over the last couple of years, **trust** in online health resources has **increased by**

44%

Question: Overall, do you feel your trust for online resources related to health information has increased, decreased or remained the same compared to a few years ago?
Please select one.
Base: Used Online Resources Listed. (Not Just Other). (n=4908).
Source: Google & OTX, Health Consumer Study, December 2009

The Internet is a Powerful Tool for Health Research

The Internet is the Top Resource for Health Questions & Concerns



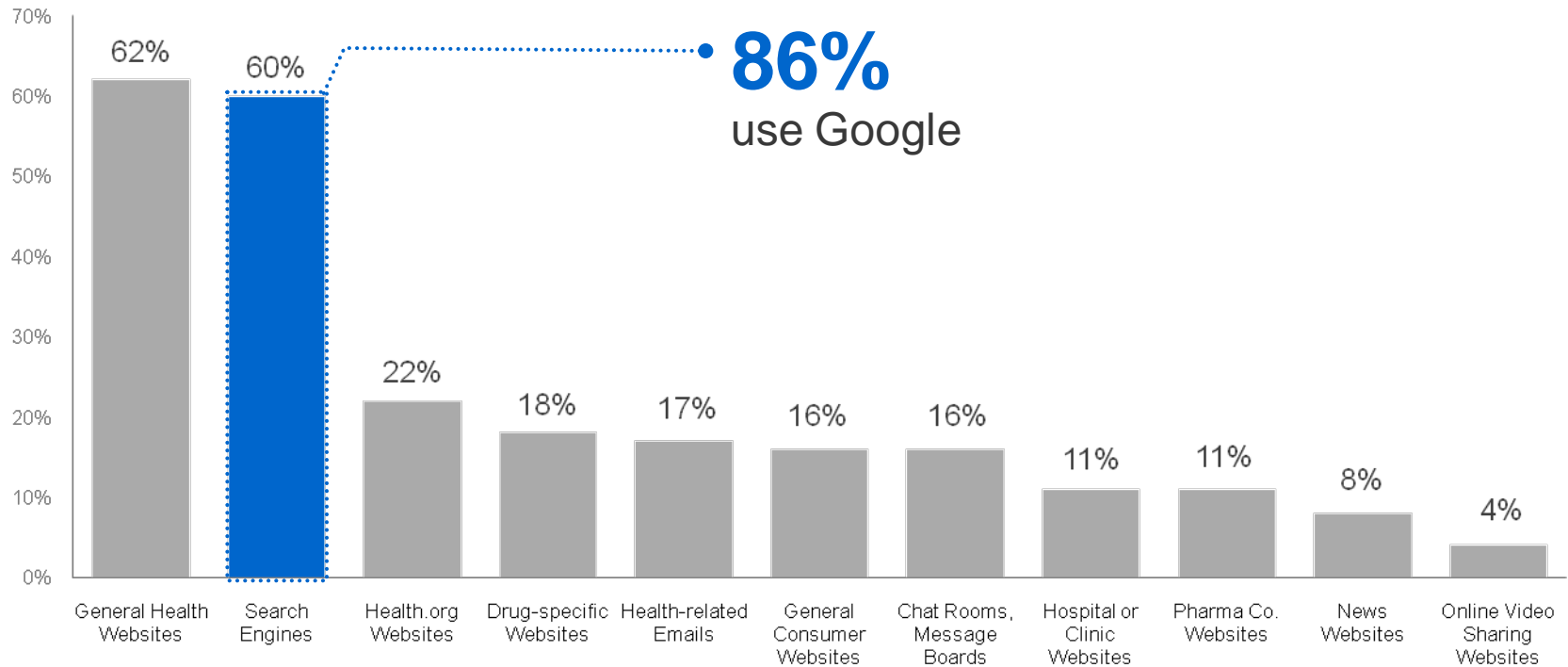
Question: In the past 12 months, which of the following resources have you used to obtain information on a health-related question or concern? Please select all that apply.

Base: Total US Respondents 18+ who do not work in related professions/taken related surveys in past 12 months and have researched health information in the past 12 months. (n=22806).

Source: Google & OTX, Health Consumer Study, December 2009

Consumers Prefer a One-Stop Shop

Online Sources Used For Health-Related Information



Question: Which online resource(s) did you use to gather information about your most recent health condition-related question or concern? Please select all that apply.

Base: Total Health Consumers. (n=5001).

Box indicated significant difference at 95% confidence interval

Source: Google & OTX, Health Consumer Study, December 2009

Patients Go Online Before Talking to a Doctor

75%

Research symptoms online
first and then go discuss
with their doctor

70%

Research online after
being prescribed a med
but before starting it

Question: Since you started using the Internet as a source of information for your health condition-related question or concerns, how often do you do the following?

Please select one for each. Top 2 box.

Base: n=5001

Source: Google & OTX, Health Consumer Study, December 2009

Consumers Look to Research & Engage

Reasons for Doing Health-Related Activities Online

87% Gathering Info

Read an article/newsletter/report	57%
Researched treatment options	48%
Researched medications	40%
Read or posted to blog/message board	17%
Researched facilities	8%

43% Acting on Info

Signed up for a health-related newsletter	21%
Clicked on an ad	12%
Recommended a website to someone	10%
Viewed or posted a health video	8%
Clicked on a link to contact an expert	7%
Shared info via chat room or blog	7%
Forwarded a link or video to someone	6%
Joined an online support group	5%

Question: Which of the following activities did you do online as you were gathering information on your most recent health condition-related question or concern? Please select all that apply.

Base: Total Health Consumers. (n=5001).

Source: Google & OTX, Health Consumer Study, December 2009



The Internet is health consumers' first stop; it should be marketers' first thought.

Search: the First, Second, Third,
& Fourth Opinions



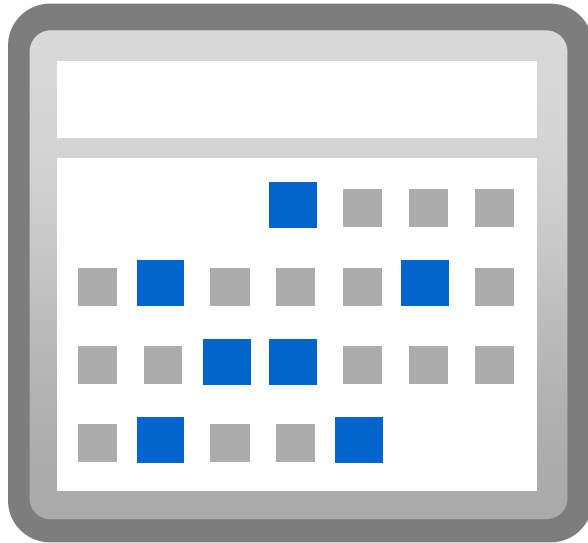
Patients Search Early ...

64% Used search **1st** to start their condition research



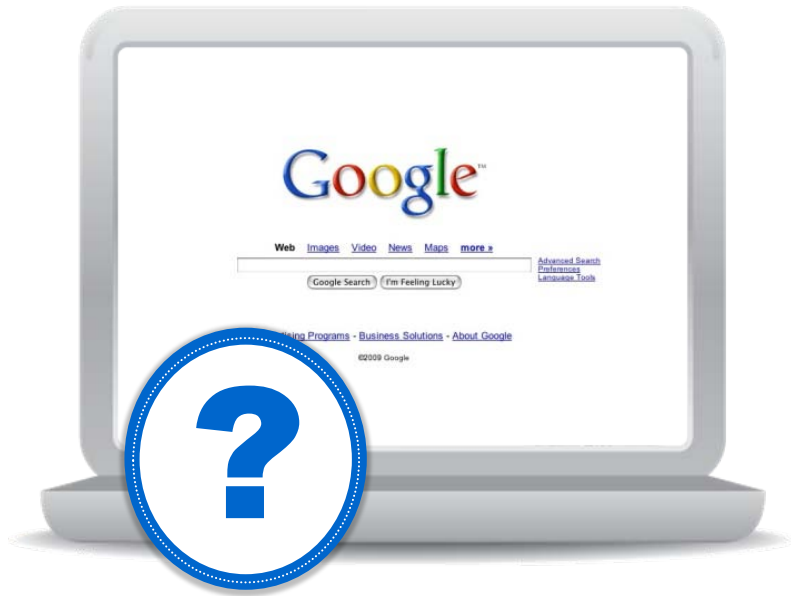
Questions: Please order the online resources you used to gather information on your most recent health condition-related question or concern from 1 to [INSERT NUMBER OF PUNCHES SELECTED AT Q5], where "1" means "resource you used first" and "[INSERT NUMBER OF PUNCHES SELECTED AT Q5]" means "resource you used last." If you used an online resource multiple times, think about the first time you used the online resource. Which search engine(s) did you use to search for information on your health condition-related question or concern? Please select all that apply. Base: Total Health Consumers. Used Search Engines. (n=2983). Search Engines Users. (n=2983)
Source: Google & OTX, Health Consumer Study, December 2009

... And Often



37% Search weekly or more often

53% Conduct **3+** searches to answer a health question



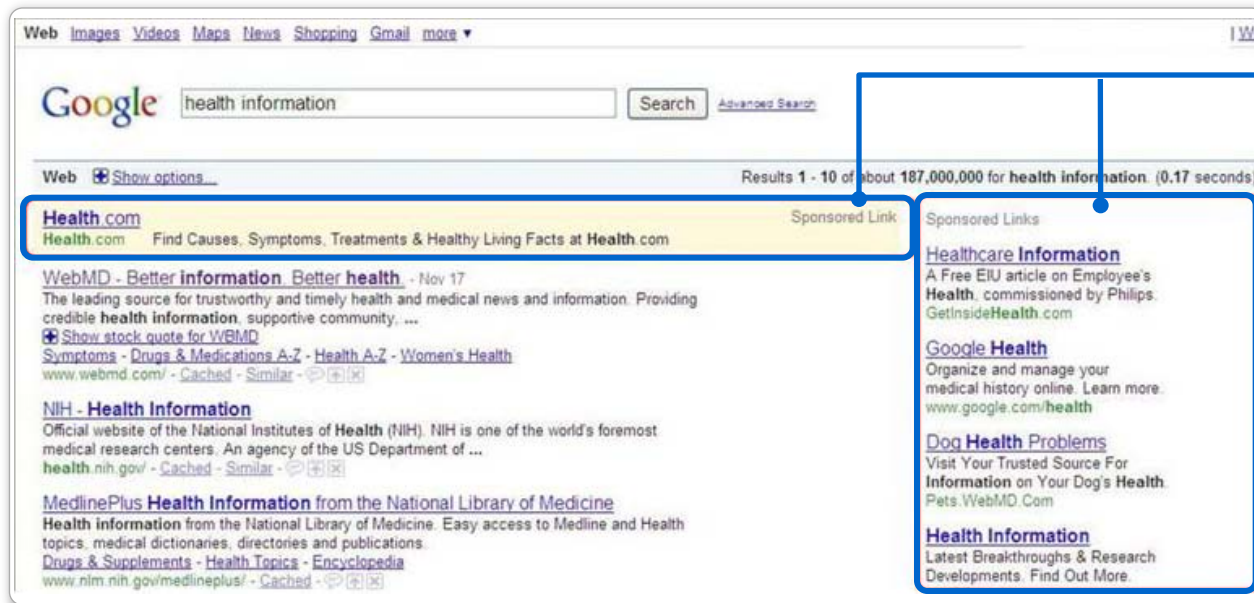
Questions: How often did you typically use search engines to search for information on your health condition-related question or concern? Please select one. Thinking about the last time you used a search engine for a health condition-related concern, how many searches did it take to answer your question?

Please enter a number into the space provided.

Base: Search Engine Users (n=2983)

Source: Google & OTX, Health Consumer Study, December 2009

Sponsored Search Helps Connects Consumers to Health Info



81% have
clicked on sponsored
links when looking for
health information

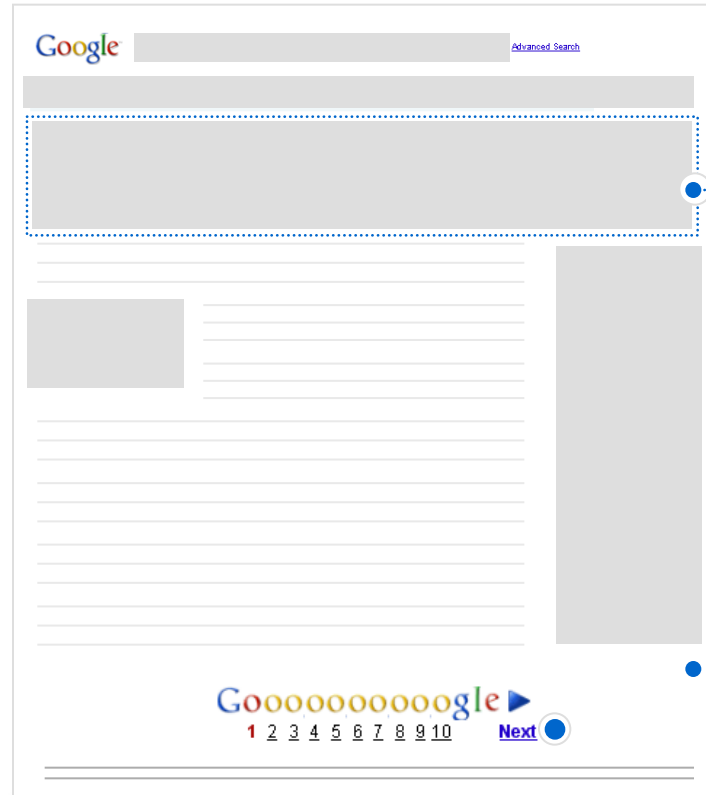
Question: How often, if ever, do you click on sponsored links like the ones boxed in red when you are looking for health-related information? Please select one.

Base: Total Health Consumers (n=5001)

Source: Google & OTX, Health Consumer Study, December 2009

But Patients Read Selectively

55% Never Make It Past the First Page



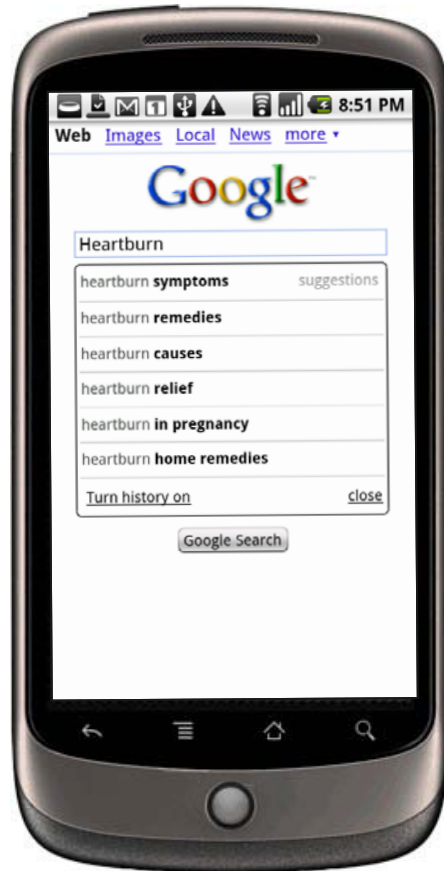
29%
Read only the
results on the top
of the first page

Question: Regardless of how you answered the previous questions, when reviewing search results, how often do you do the following? Please select one for each. Top 2 box.

Base: Total Health Consumers (n=5001)

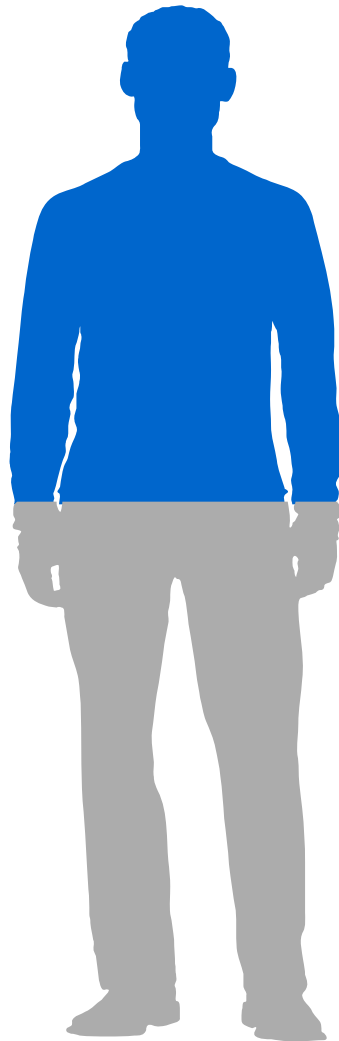
Source: Google & OTX, Health Consumer Study, December 2009

Consumers Want to Search for Info Wherever They Go



20%
of health consumers
**search for health-related
information** on their
mobile device

Search Engines Drive Consumers to Take Action



55% Changed behaviors / lifestyle

52% Made a self-diagnosis

49% Started an over-the-counter treatment

48% Researched treatment options online

47% Research medications online | Asked a friend or family member about a condition

46% Told a doctor about a symptom I / someone else had

Questions: Which of the following actions did you take as a result of using a search engine to look for information on health condition - related questions or concerns? Please select all that apply.

Floating Base: Used Online and Offline Sources

Source: Google & OTX, Health Consumer Study, December 2009



Consumers **crave information** that answers their health questions. **Search** can help you be **more transparent** and further **engage** your patients.

Consumers Watch Health Videos More Than Food & Celebrity

News
42%



Health
32%



Food
27%



Celebrity
26%



Question: Thinking about online videos in general, which, if any, of the following types of videos do you typically watch on the Internet? Please select all that apply.

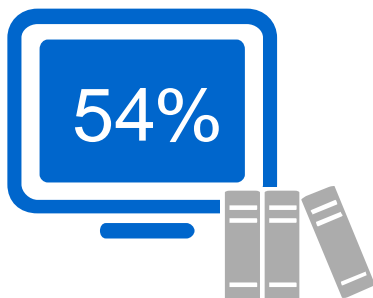
Base: Total Health Consumers. (n=5001).

Source: Google & OTX, Health Consumer Study, December 2009

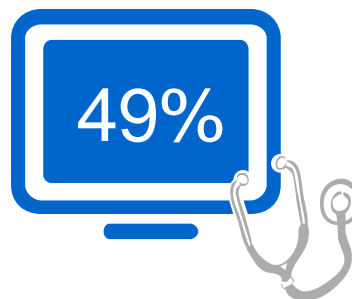
Patients Want Credible Info in Health Videos

Types of Health Related Video Content Consumers Want

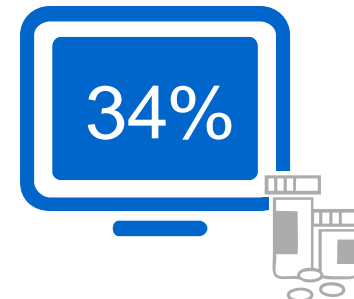
Educational
Condition-Specific Videos



Videos Featuring Experts
(e.g. doctors)



Videos About Specific
Medications



Questions: Whether or not you have ever seen any, how interested are you in viewing videos on the Internet featuring health-related content? Please select one. Using the scale below, please tell us how interested you are in viewing each of the following types of health-related video content on the Internet? Please select one for each.

Base: Non-Video Rejecters (n=4383)

Source: Google & OTX, Health Consumer Study, December 2009

Health Videos Inspire Consumers to Take Action



Question: Which of the following actions, if any, did you take as a result of having watched a Health-Related video on the Internet? Please select all that apply

Base: Watched Health-Related Videos 1595

Source: Google & OTX, Health Consumer Study, December 2009



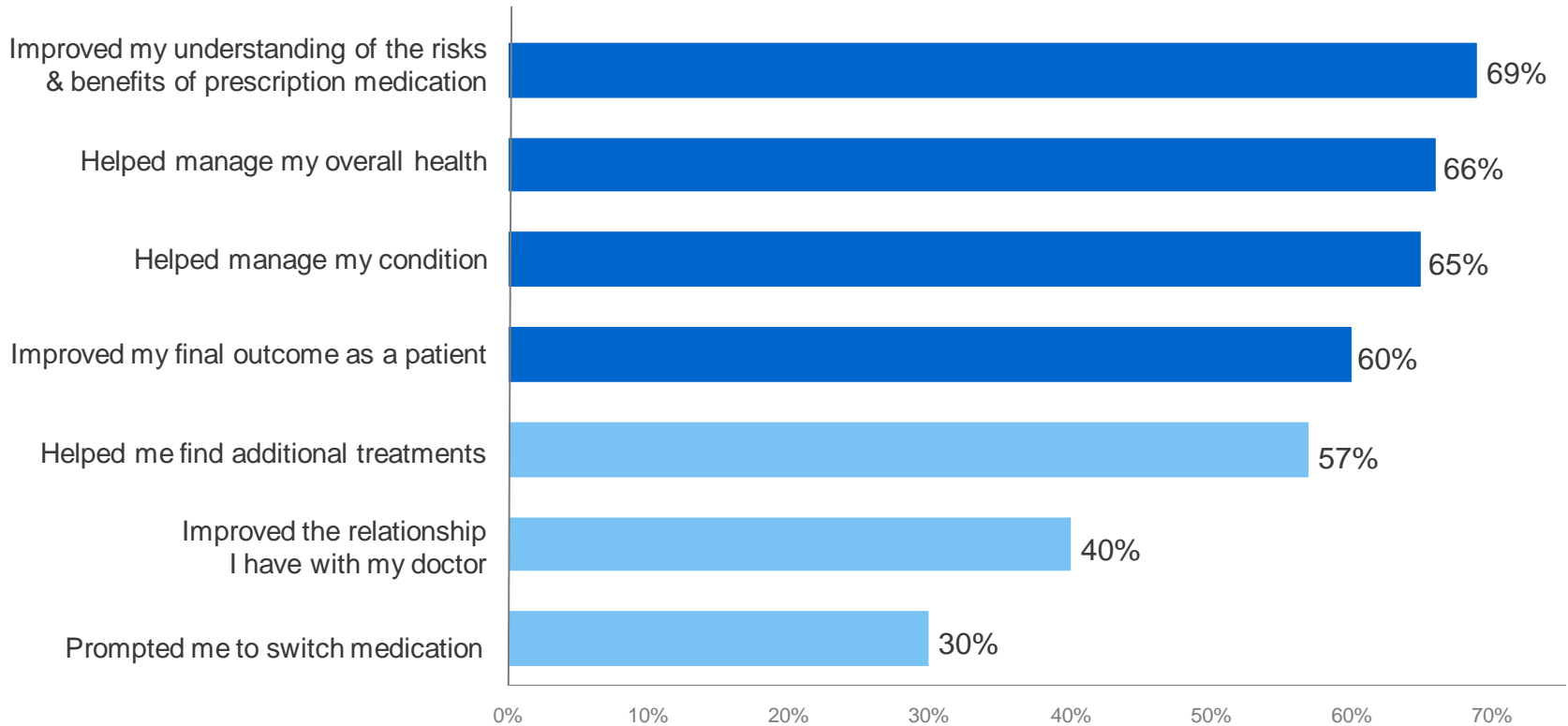
Use the **sight, sound, and motion** of video to create **emotional touchpoints** with your consumers. Make sure consumers can **easily find and interact** with **your online videos**.

The Internet is Good for Patient Health



Online Info Improves Health Management

Agreement With Helpfulness of Information Found Online



Question: Using the scale below where 1 means 'Disagree Strongly' and 5 means 'Agree Strongly,' please indicate how much you agree or disagree with the following statements. Please select one for each. Top 2 Box.
Floating Base: Total Applicable Health Consumers - Excluding "Not Applicable" (Range: n=4553 to 3073). Source: Google & OTX, Health Consumer Study, December 2009

Online Info Empowers Patients

Impact of Internet on Patient Confidence

67%

**Empowered and
Informed of All
Your Options**

61%

**In Control of
Your Treatment**

59%

**Confident and
Independent in
Deciding Your
Treatment Options**

Question: Using the scale below where 1 means 'Disagree Strongly' and 5 means 'Agree Strongly,' please indicate how much you agree or disagree with the following statements. Please select one for each. Top 2 box

Base: Total Health Consumers. (n=5001).

Source: Google & OTX, Health Consumer Study, December 2009

Online Research Drives Action

78% of Consumers Do an **Offline Activity** as a Result of Online Research



Question: And what offline activities did you or someone else do as a result of the health condition information you gathered online? Please select all that apply.

Base: Total Health Consumers (n=5001)

Source: Google & OTX, Health Consumer Study, December 2009

... And Interaction With the Doctor

49% of Consumers **Talk to a Doctor** as a Result of Online Research



Question: And what offline activities did you or someone else do as a result of the health condition information you gathered online? Please select all that apply.

Base: Total Health Consumers (n=5001)

Source: Google & OTX, Health Consumer Study, December 2009



Online health research and digital marketing stimulate the doctor – patient dialogue.

Conclusions

Search Empowers Patients to Act

1 **Patients' trust of online information has dramatically increased**
The Internet is health consumers' first stop; it should be marketers' first thought.

2 **Search is the go-to source for online information**
Consumers crave credible information that answers their health questions. Search helps you be more transparent and further engage your patients.

3 **Patients look for new ways to connect with online information**
Use sight, sound, and motion of video to create emotional touchpoints with your consumers. Make sure consumers can easily find and interact with your online videos.

4 **Search drives action and outcomes**
Online health research and digital marketing stimulate the doctor – patient dialogue.

Appendix

Demographics

Gender		Race	
Female	72%	White or Caucasian	82%
Male	28%	Black or African-American	6%
Age		Asian/Pacific Islander	4%
50 and over	38%	Native American, Alaska Native, Aleutian	1%
18 to 34	34%	Hispanic or Latino	4%
35 to 49	28%	Other	1%
Mean	43	Highest Level of Education	
Employment Status		Some College or less	64%
Employed	52%	College+	35%
Homemaker	12%	Children Ages 0-17	
Retired	13%	No	60%
Student	8%	Yes	40%
Unemployed	12%	Hours per Week spent Online Average	
Marital Status		Average Household Income	
Married	51%	\$60K	
Living with Partner	8%		
Single/Never Married	24%		
Divorced/ Separated	12%		
Widowed	3%		

Base: Total Health Consumers (n = 5001); *Note: Demos do not show "prefer not to answer"
 Source: Google & OTX, Health Consumer Study, December 2009