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Health Consumer Study
The Role of Digital in Patients’ Healthcare Actions & Decisions

Google/OTX
U.S., December 2009
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
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.
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).
The Internet is a Powerful Tool for Health Research

The Internet is the Top Resource for Health Questions & Concerns

- Internet: 65%
- Primary Care Physician: 53%
- Friend, Relative, or Colleague: 37%
- Pharmacist: 28%
- Specialist: 22%
- Television: 18%
- Magazines: 17%
- Newspapers: 10%
- Radio: 6%

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).

Consumers Prefer a One-Stop Shop

Online Sources Used For Health-Related Information

- **86%** use Google

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.
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
Consumers Look to Research & Engage

Reasons for Doing Health-Related Activities Online

<table>
<thead>
<tr>
<th>87% Gathering Info</th>
<th>43% Acting on Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read an article/newsletter/report</td>
<td>Signed up for a health-related newsletter</td>
</tr>
<tr>
<td>Researched treatment options</td>
<td>Clicked on an ad</td>
</tr>
<tr>
<td>Researched medications</td>
<td>Recommended a website to someone</td>
</tr>
<tr>
<td>Read or posted to blog/message board</td>
<td>Viewed or posted a health video</td>
</tr>
<tr>
<td>Researched facilities</td>
<td>Clicked on a link to contact an expert</td>
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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).
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)

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)
Sponsored Search Helps Connects Consumers to Health Info

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)

81% have clicked on sponsored links when looking for health information.
But Patients Read Selectively

55% Never Make It Past 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)
Consumers Want to Search for Info Wherever They Go

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

Questions: Do you currently have a mobile device that gives you access to the Internet? How often do you use your mobile device to search for online health-related information?
Base: Total Health Consumers. (n=5001)
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

- **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
Video: Show & Tell
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).
Patients Want Credible Info in Health Videos

Types of Health Related Video Content Consumers Want

- **Educational Condition-Specific Videos**: 54%
- **Videos Featuring Experts (e.g. doctors)**: 49%
- **Videos About Specific Medications**: 34%

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)
Health Videos Inspire Consumers to Take Action

43%
Used a search engine to search for more information on a health topic that was featured in an online health video

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
The Internet is Good for Patient Health
**Online Info Improves Health Management**

**Agreement With Helpfulness of Information Found Online**

<table>
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<th>Statement</th>
<th>Agreement</th>
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<td>Improved my understanding of the risks &amp; benefits of prescription medication</td>
<td>69%</td>
</tr>
<tr>
<td>Helped manage my overall health</td>
<td>66%</td>
</tr>
<tr>
<td>Helped manage my condition</td>
<td>65%</td>
</tr>
<tr>
<td>Improved my final outcome as a patient</td>
<td>60%</td>
</tr>
<tr>
<td>Helped me find additional treatments</td>
<td>57%</td>
</tr>
<tr>
<td>Improved the relationship I have with my doctor</td>
<td>40%</td>
</tr>
<tr>
<td>Prompted me to switch medication</td>
<td>30%</td>
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**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.


**Source:**

**Think Health with Google**

Google Confidential and Proprietary 22
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).
Online Research Drives Action

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

- **49%** Talk to a doctor
- **27%** Changed behaviors/lifestyle
- **23%** Asked a friend or family member about a condition
- **17%** Made a self-diagnosis
- **16%** Tried alternative treatments
- **12%** Started an over-the-counter treatment
- **12%** Used another resource to gather more info
- **3%** Called a toll-free number

**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

- 22% Told a doctor about a symptom
- 15% Asked a doctor about a prescription drug I read about online
- 12% Asked a doctor about a medical device
- 9% Asked a doctor to prescribe a different drug
- 21% Scheduled a doctor’s appointment
- 13% Asked a doctor about the condition treated by a drug I read about online
- 11% Asked a doctor for lab testing
- 7% Asked a doctor about a surgical procedure

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)
Summary of The Patient’s Journey to Action

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