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The Inside Look at the Boomer Healthcare Consumer

Google/Nielsen Online/Sterling
U.S., September 2010

Study Scope and Methodology

- **Survey Approach Developed by Nielsen and Google**
 - Google/Nielsen Boomers Survey fielded August 2010, N=3,878
- **Definitions**
 - Gen Y: 18-30
 - Gen X: 31-45
 - Boomers: 46-65
 - **Healthcare Boomer Consumer = Used the internet for health info within the last 12 months**
 - G.I. Generation: 66-75
 - Silent/Lost Generation: 75+
- **Qualitative Research**
 - Sterling Brands: Online focus group of 15 Boomers

Executive Summary of Insights

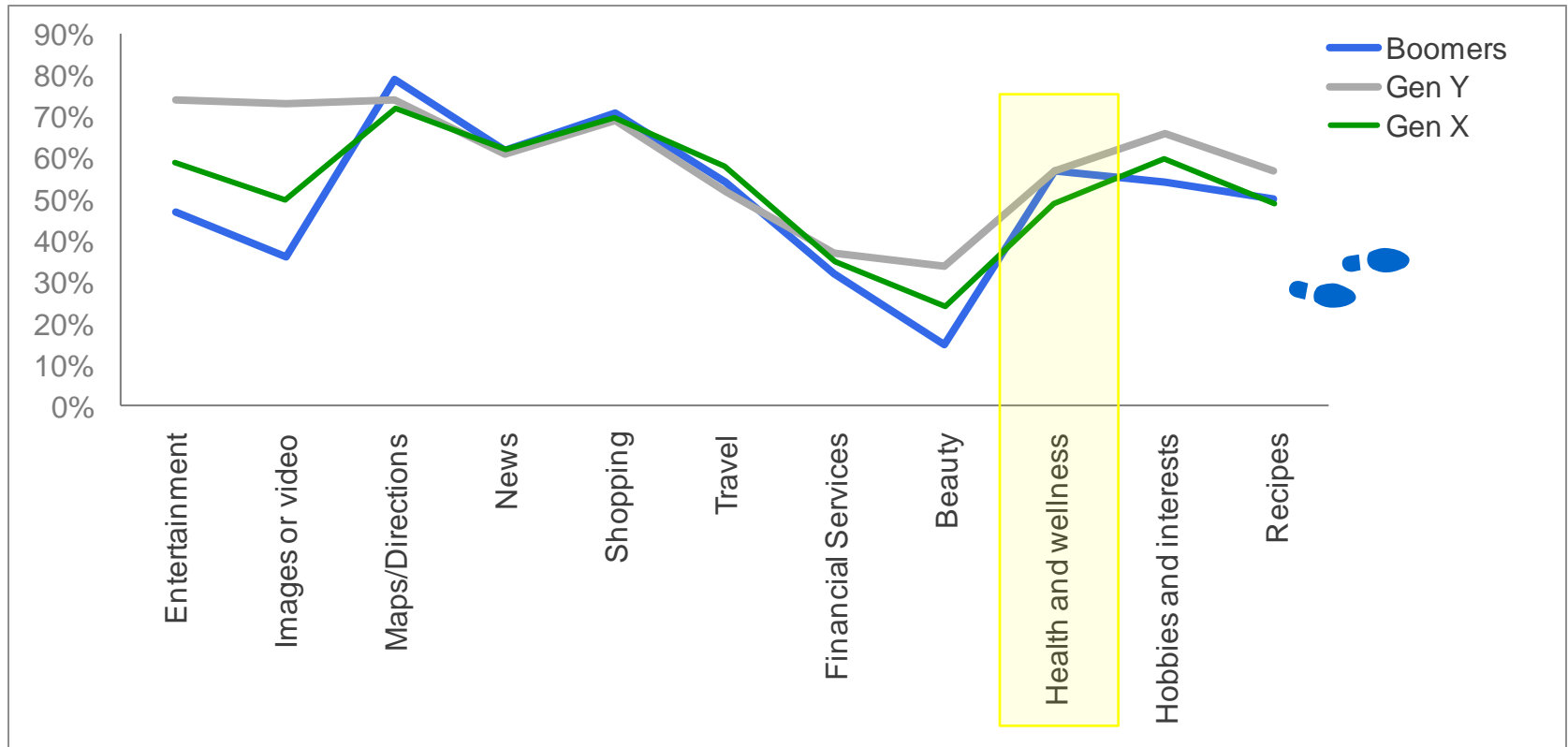
Boomers are just as active and engaged in seeking health content in the digital space as all other adults (18+); and they are engaging as both patients & caregivers

Boomers' health search queries indicate they are further along the patient pathway – queries focus on treatment, drug and remedy information; indexing highest for medication, medication efficacies, side effects & risks

Offline channels actively drive Boomers online – TV and direct response media drives search volume and online engagement, not call center volume

Boomers are Just as Search Savvy as Gen X and Y, Especially in the Health Space

Type of information searched for on search engine



57% of Boomers Have Searched for Health and Wellness Information Online



10% More likely to have recalled using the internet to research health in the last 3 months than the average adult

Source: Google/Nielsen Boomer Survey August 2010

Q: When is the last time, if ever, you used the internet to learn more about the following products? – Health and Wellness

N = 2175

Boomer's are the Most Likely to Research Health Topics as a Caregiver, Specifically...



37%

More likely to look up medication benefits for a family member or friend

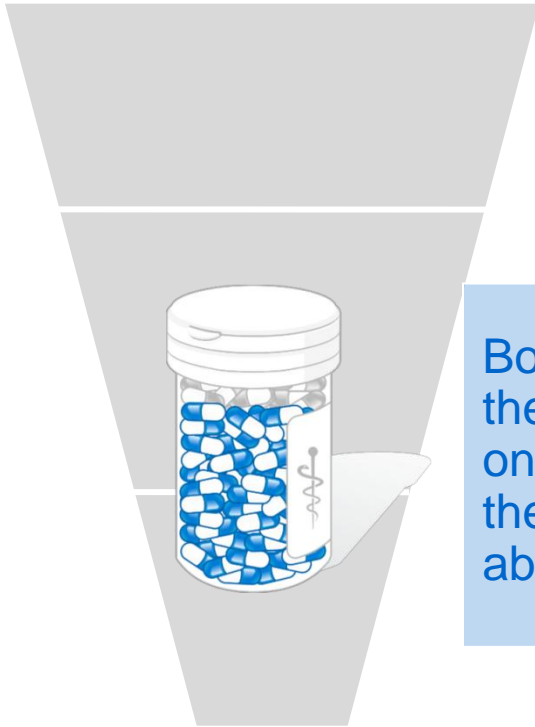
23%

More likely to look for medication side effects for a family member or friends

20%

More likely to research general info about medications and treatments for a family member or friend

Boomers are “mid/lower” funnel in their search for health information; closer to treatment options, medications, and adherence

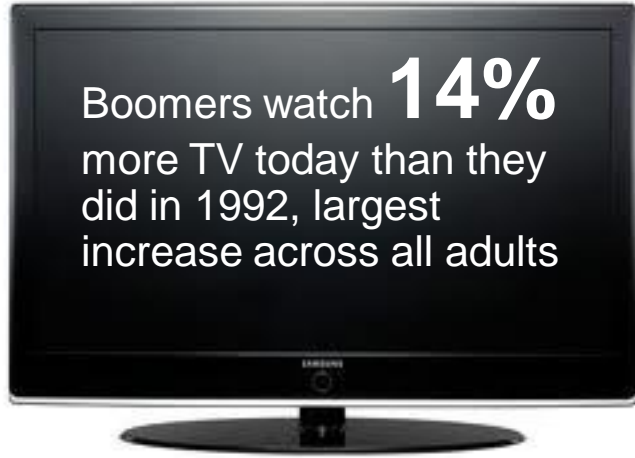


Search Drives Interaction with HCP

Boomers are **20% more likely** to find their research helped by providing info on a drug, remedy, or treatment that they were able to ask their physician about



TV is an Effective Trigger to Search



78%

of Healthcare Boomer Consumers have searched after seeing something on TV

45% of Boomers co-consume television and internet media

Source: Google/Nielsen Boomer Survey August 2010:
Question 17 "Have you ever used a search engine to find more information on something that you . . .saw on a television commercial" OR "saw featured on a TV program?" Net those who responded yes.
Healthcare Boomer Consumer N=1315
Q24.1 How often do you engage in other activities at the same time you are using the Internet? Healthcare Boomer Consumer N=1688



Sponsored Links Speak to Boomer Healthcare Consumers

73%

Healthcare **Boomers**
click on sponsored
links

65%

Healthcare **Gen Xers**
click on sponsored
links

60%

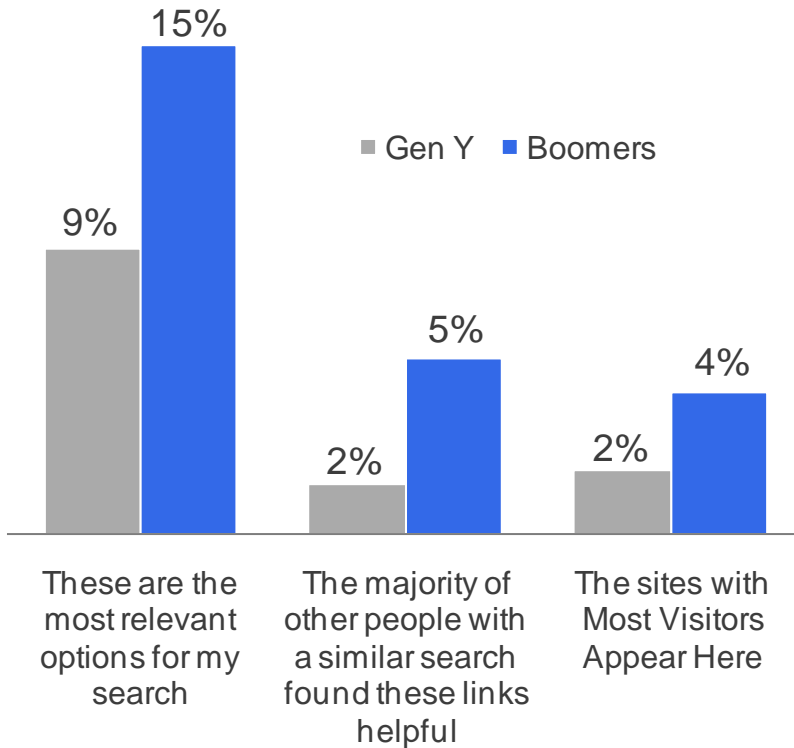
Healthcare **Gen Yers**
click on sponsored
links



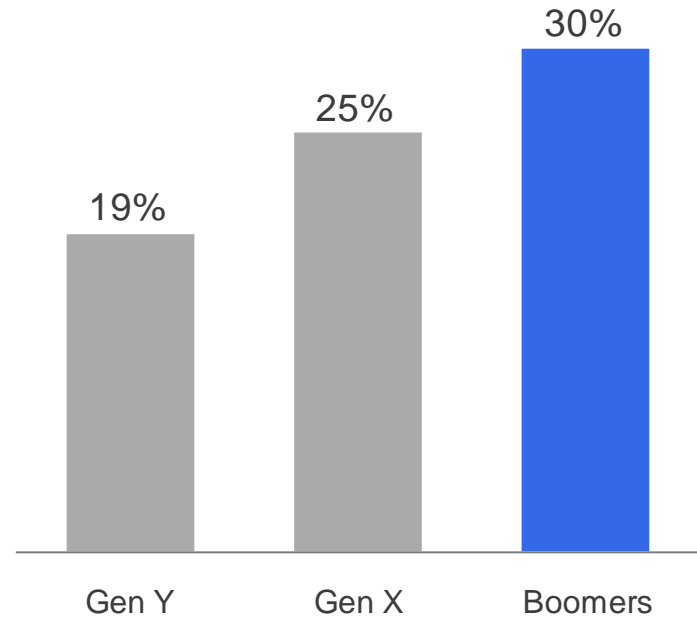
Source: Google/Nielsen Boomer Survey August 2010:
Q21: "Have you ever clicked on links that typically appear in the sections highlighted in red?" Respondents who answered 'Yes'.
Healthcare Gen Y Consumer N=217, Healthcare Gen X consumer N=483, Healthcare Boomer Consumer N=1683

Boomers Find Sponsored Links Relevant and Useful

Perceived Purpose of Sponsored Links
% Audience



% Finding Sponsored Links Useful



Key Takeaways for Healthcare Marketers

Meet the Boomers' need for “mid/lower funnel” content and information

- Boomers actively search for content such as drug/treatment options, medications and tools to help with adherence (e.g. lifestyle tips or value-based promotions)

Speak to Boomers as Both Patients and Caregivers

- Design campaigns and creative executions that support patients and caregivers
- Pair creative targeting with precision targeting media

Use Surround Sound Marketing Strategies (Integrated Offline and Online Tactics) to Help Engage Boomers

- Search and online advertising campaigns need to align (e.g. creative, timing, messaging) with traditional offline media strategies

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