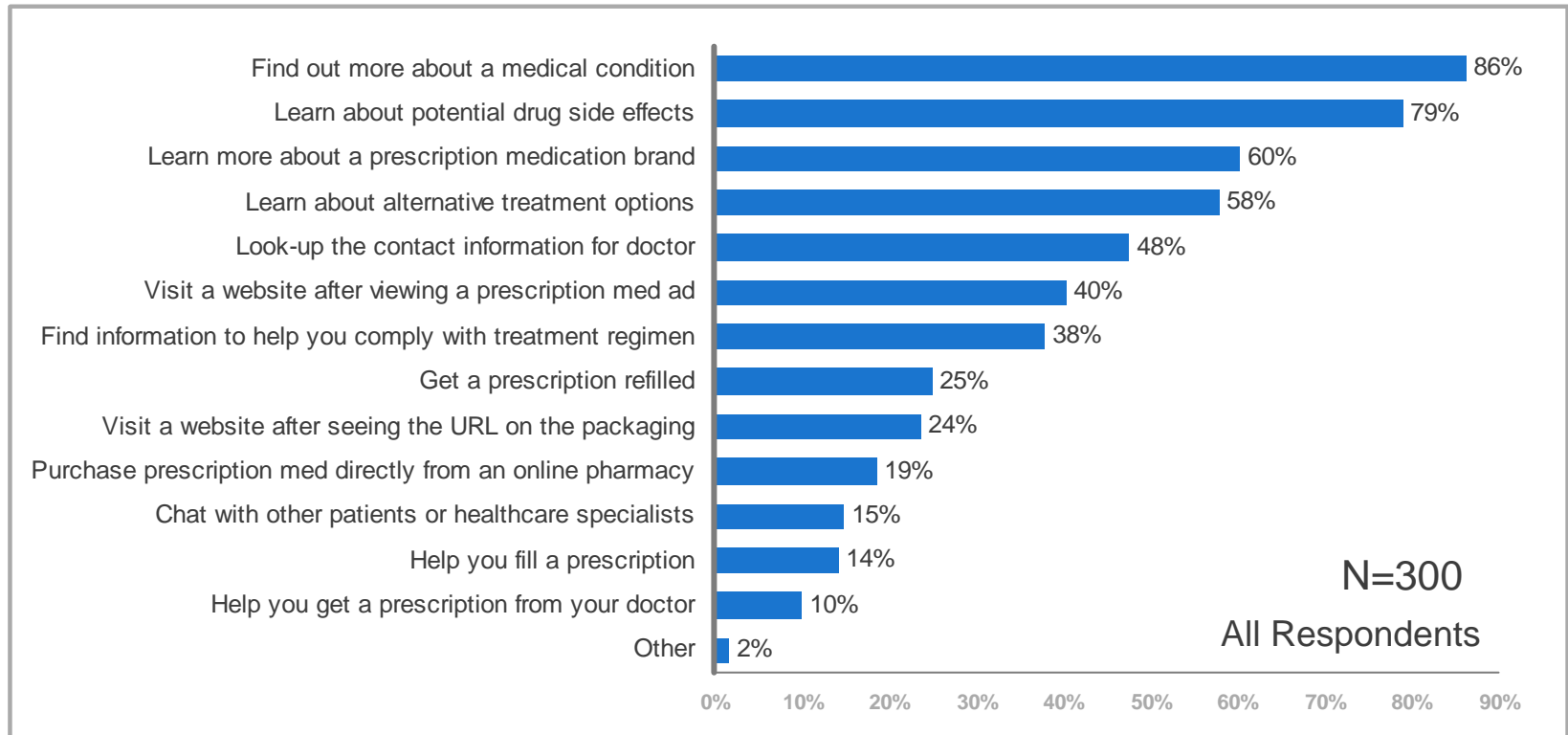


## **We surveyed a total of 300 consumers that use the web to research and/or purchase Healthcare products and information**

- A custom survey instrument (i.e. questionnaire) was developed to measure respondents' use of the web, and search engines in particular, for researching and purchasing Healthcare products and information
- The survey was conducted online, through a web-based interviewing process, in March 2005
- Our sample is evenly distributed across all age groups and genders
- Respondents were recruited through a variety of methods: web advertising, permission-based databases, public relations, telephone recruitment, partner-recruited panels, and alliances with heavily trafficked portals
- The survey was designed and administered by Media-Screen, an independent strategic market research firm, with sampling and data collection provided by GMI (Global Market Insite)

- Search engines play a **major role** in health information research – used by 93% to research medications, conditions, and treatment options
- Users consider the Internet a **highly-trustworthy source** (70%) for health information, trailing only doctors and pharmacists
- Users go online to fulfill a **wide variety of health-related needs**; the most popular are: researching a medical condition (86%) and researching potential drug side effects (79%)
- Users turn to search engines to research a wide variety of medical conditions; the most popular are: **allergies** (41%), **depression** (37%), **cholesterol** (29%), **pain** (27%), and **arthritis** (24%)
- More than any other online resource, users go to search engines **first** (38%) for health information
- The vast majority of users (94%) find search engines very important or somewhat important for health-related research and purchase
- Online health information has **strong offline effects** – nearly one-half (47%) of Google users have approached a doctor about a medication or treatment after learning about it online.
- Almost one-third (30%) of Google users have **filled a prescription online**, while 70% have not.

Users go online to fulfill a **wide variety of health-related needs**; the most popular are: researching a medical condition (86%) and researching potential drug side effects (79%)

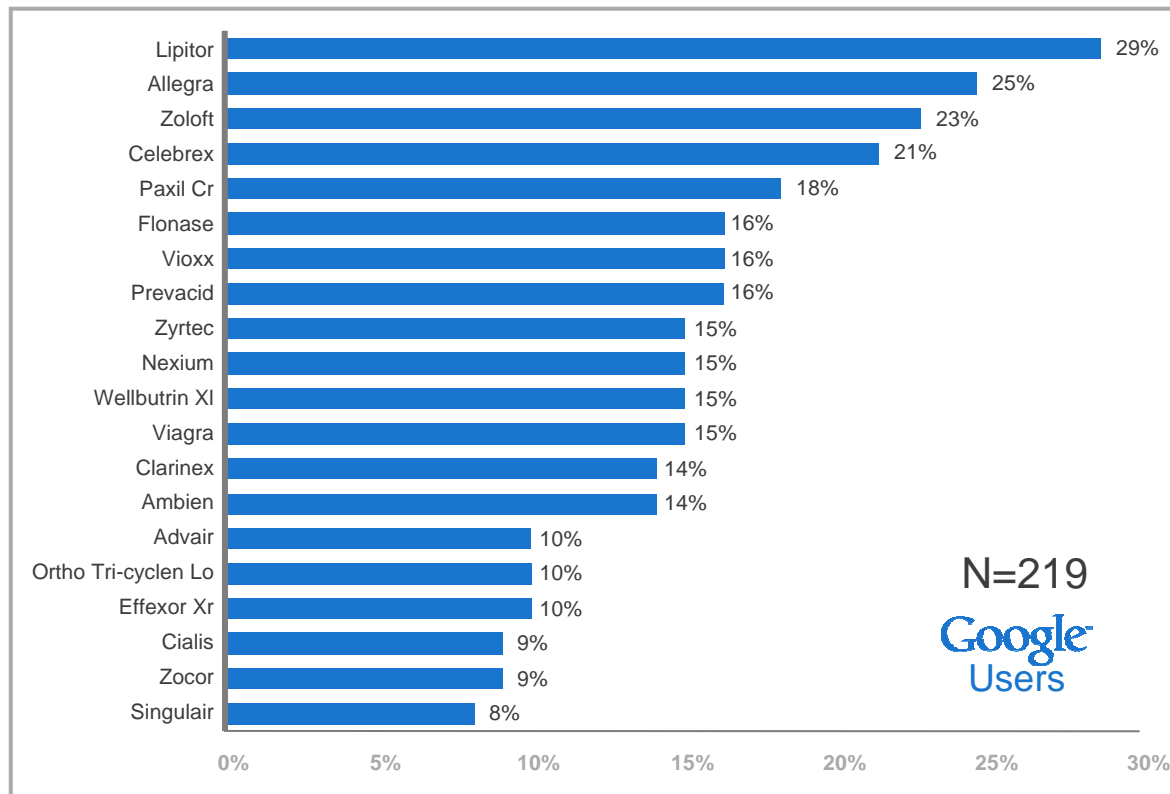


Have you ever done any of the following online? Please select all that apply.

# Use of Online and Prescription Medication



The most popular prescription medications researched and/or purchased online are: **Lipitor** (29%), **Allegra** (25%) and **Zoloft** (23%)



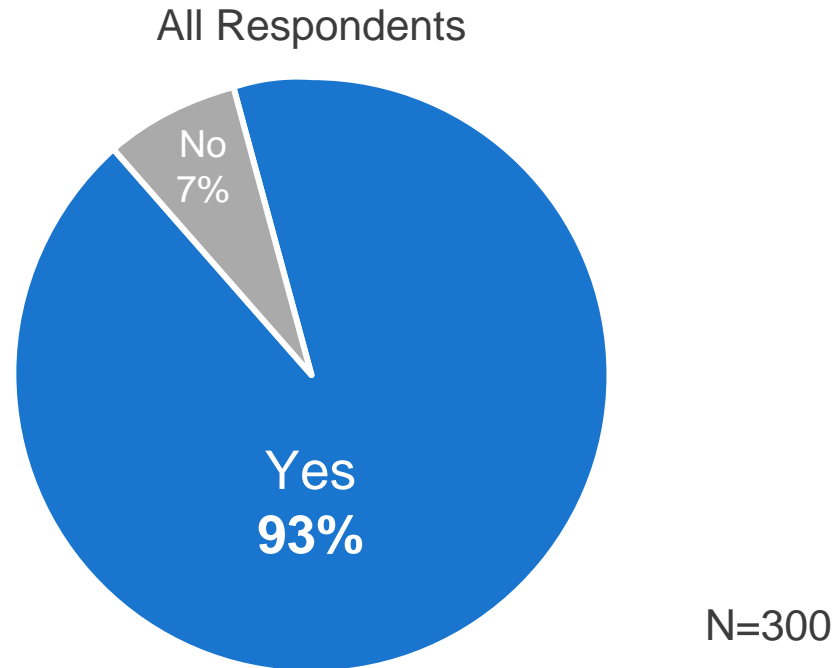
**Other Medications Researched and/or Purchased (Each under 8%)**

Levitra	Relpax
Crestor	Cymbalta
Ortho Evra	Trileptal
Adderall	Vytorin
Lexapro	Concerta
Plavix	Famvir
Rhinocort Aqua	Lamictal
Imitrex	Tamiflu
Lamisil	Nuvaring
Strattera	Aricept
Prempro	Altace
Bextra	Namenda
Botox	Seasonale
Elidel	Arimidex
Remicade	Avastin
Yasmin	Femara
Valtrex	Sustiva
Zyprexa	Reyataz
Abilify	Eligard
Enbrel	Entocort Ec
Propecia	Pegasys
Procrit	Raptiva
Avandia	
Seroquel	

Which of the following prescription medications have you researched and/or purchased online? Select all that apply.

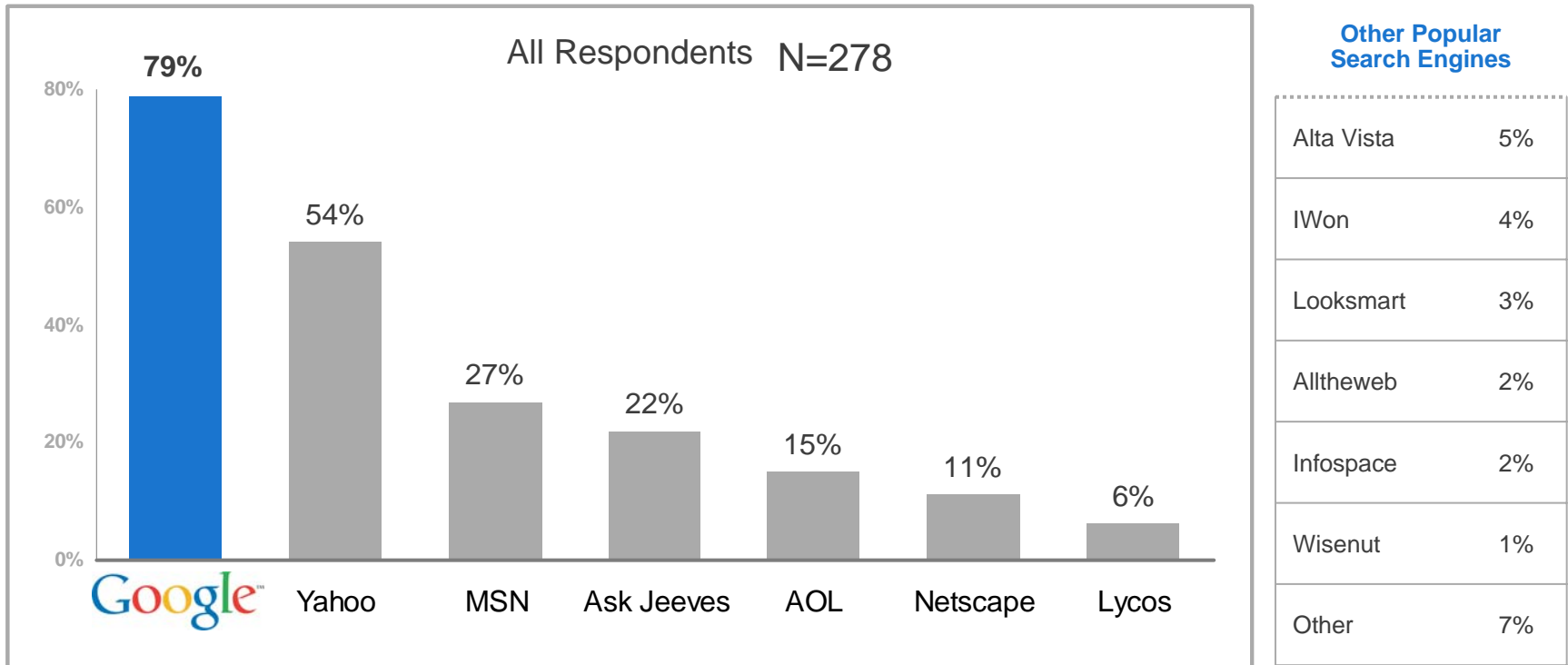
Source: 2005 Health Care Survey, conducted by GMI and Media-Screen (Mar. 2005)

Search engines play a major role in health information research – used by 93% to research medications, conditions, and treatment options



Do you ever use a search engine (such as Google, Yahoo, AOL or Ask Jeeves) when you research prescription medications, medical conditions and/or treatment options?

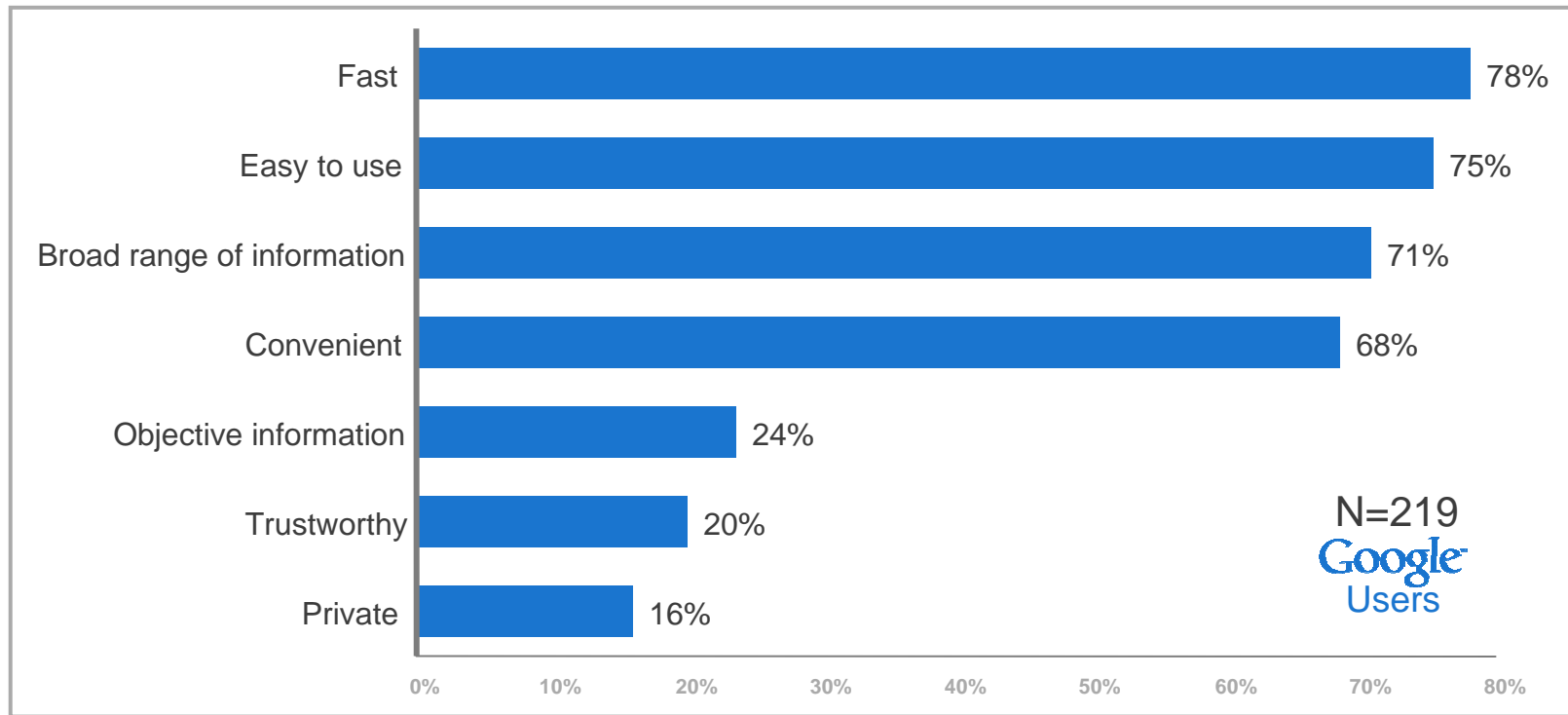
By a wide margin, Google is the most popular search engine used for researching and/or purchasing prescription medication



Which of the following search engines do you use when you research and/or purchase a prescription medication? Select all that apply

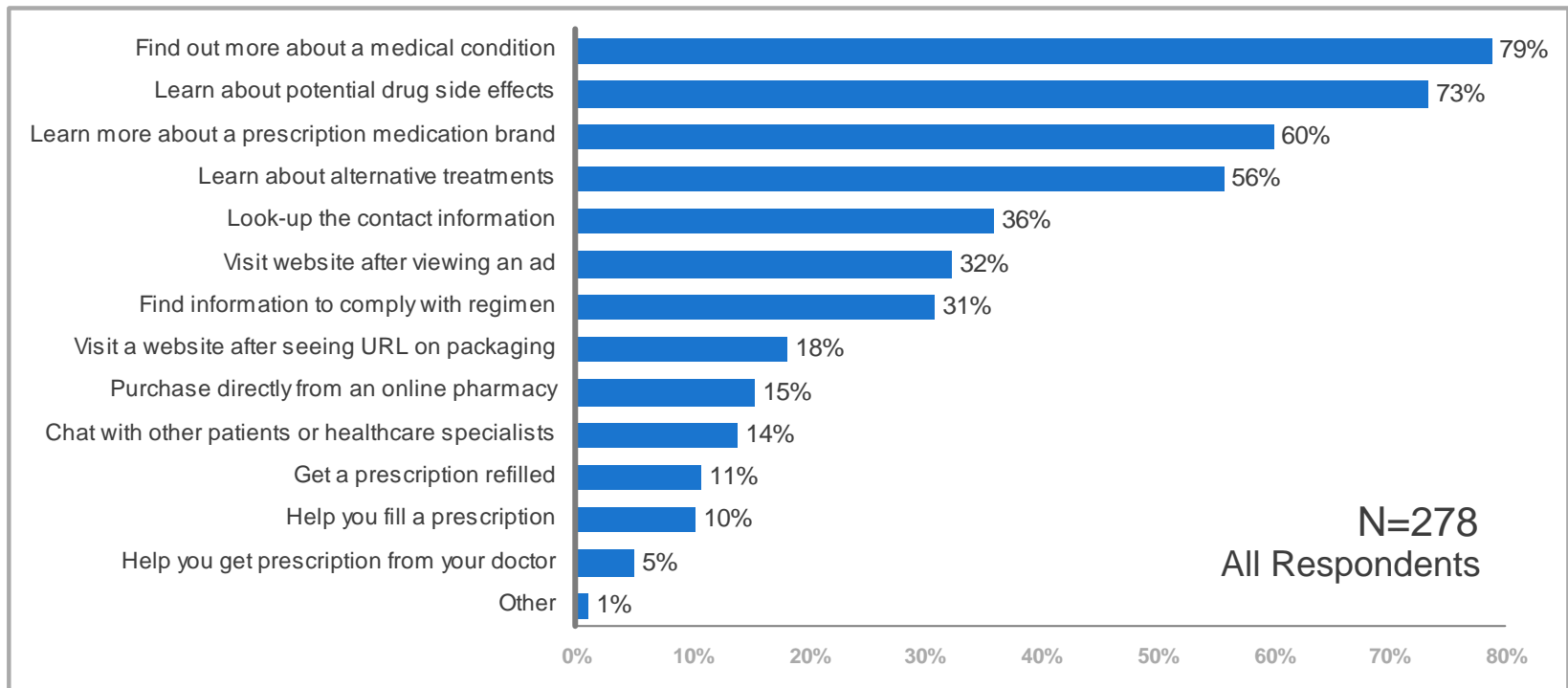
# Reason for Using Search Engine

Health information seekers use search engines for a variety of reasons; the most popular: **speed** (78%), **ease of use** (75%), **information breadth** (71%), and **convenience** (68%)



Why do you use a search engine to help you research healthcare information? Select all that apply.

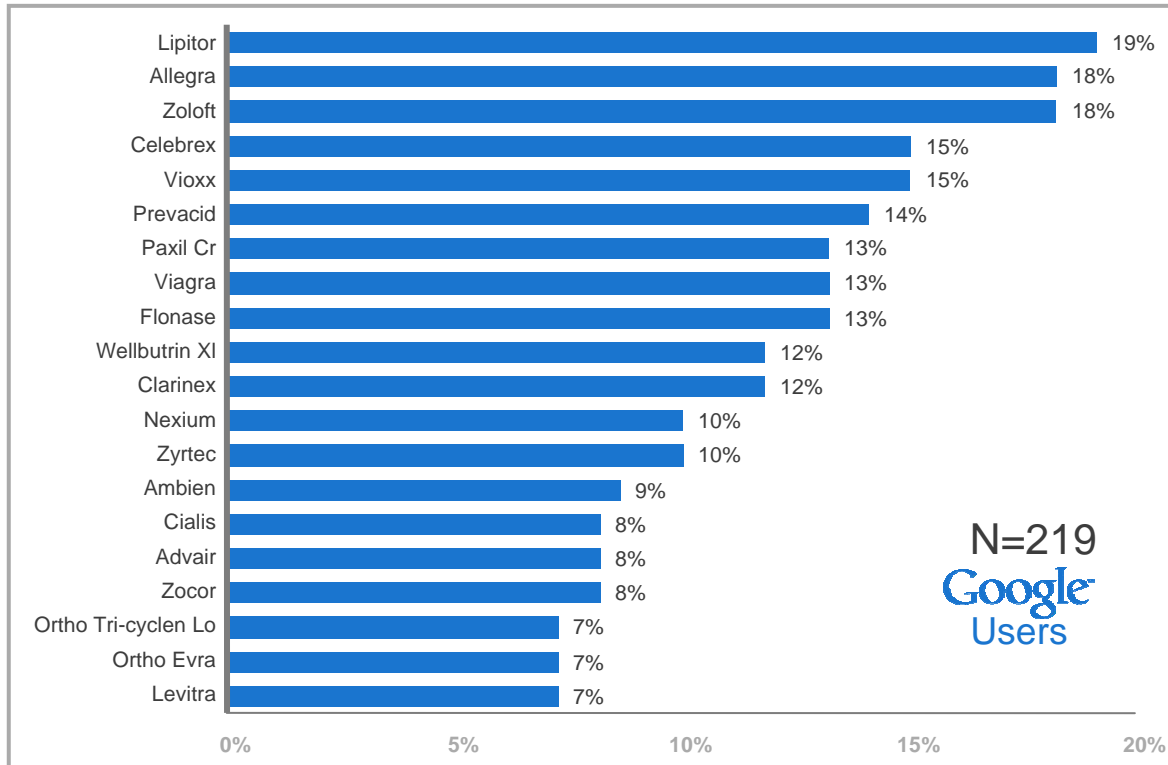
Users turn to search engines to fulfill a **wide variety of health-related** needs; the most popular are: researching a medical condition (79%) and researching drug side effects (73%)



Which of the following activities have you ever used a search engine to help you do?  
Please select all that apply.



The most popular prescription medications researched and/or purchased using a search engine are: **Lipitor (19%)**, **Allegra (18%)**, **Zoloft (18%)**, **Celebrex (15%)**, and **Vioxx (15%)**



**Other Prescription Medications Researched and/or Purchased (Each under 7%)**

Effexor Xr	Cymbalta
Adderall	Lamictal
Crestor	Nuvaring
Singulair	Seasonale
Bextra	Avastin
Botox	Namenda
Imitrex	Procrit
Strattera	Trileptal
Lamisil	Vytorin
Lexapro	Zelnorm
Rhinocort Aqua	Altace
Zyprexa	Aricept
Abilify	Arimidex
Elidel	Raptiva
Plavix	Relpax
Propecia	Reyataz
Seroquel	Sustiva
Avandia	Tamiflu
Enbrel	Eligard
Prempo	Entocort Ec
Remicade	Famvir
Yasmin	Femara
Concerta	Pegasys
Valtrex	

Please tell us which, if any, of the following prescription medications have you used a search engine to help you research and/or purchase? Select all that apply.

Users turn to search engines to research a wide variety of medical conditions; the most popular are: **allergies (41%)**, **depression (37%)**, **cholesterol (29%)**, **pain (27%)**, and **arthritis (24%)**

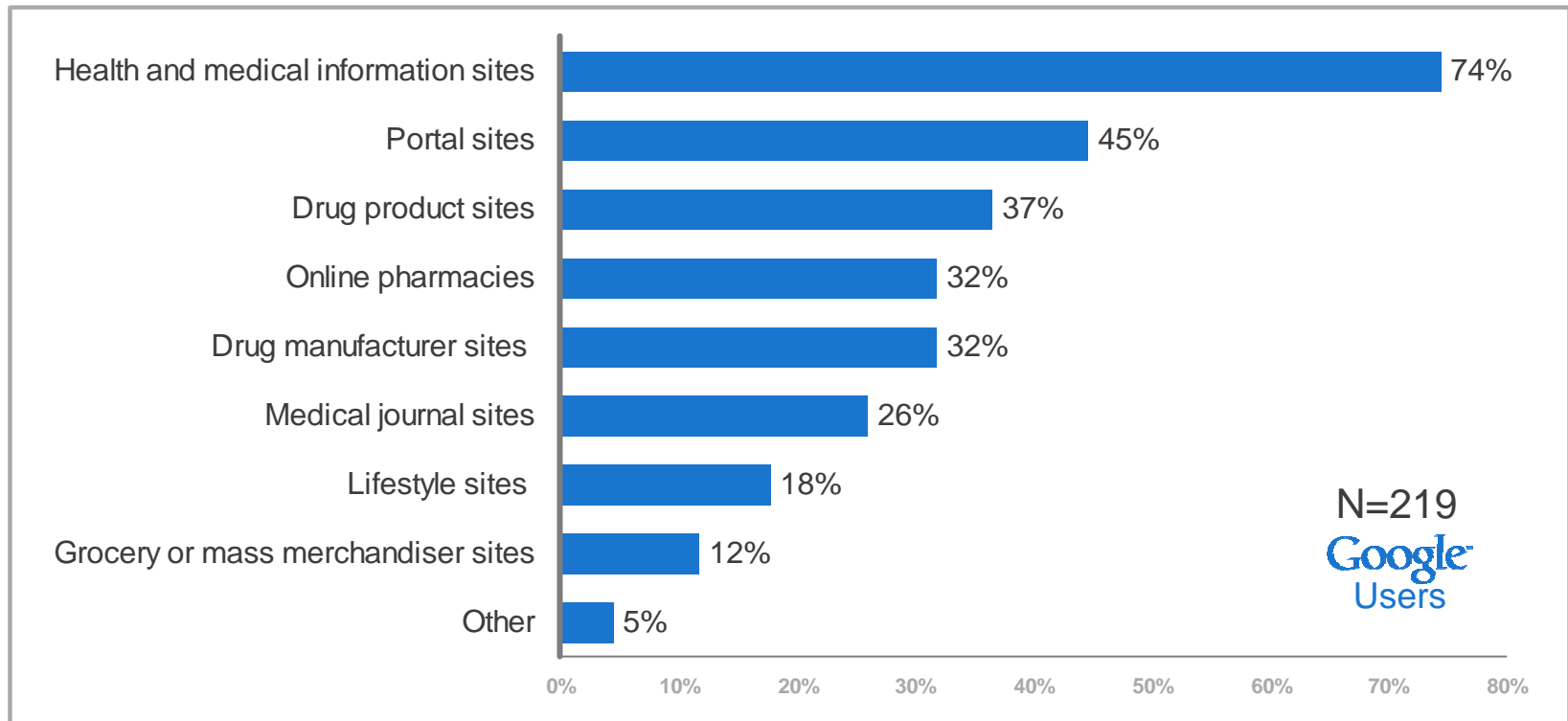
Medical Conditions	Google Users
Allergies	41%
Depression	37%
Cholesterol	29%
Pain	27%
Arthritis	24%
Heartburn	23%
ADHDa	21%
Migraine	21%
Diabetes	20%
Sinus Congestion	20%
Flu	18%
Cancer	18%
Asthma	17%
Insomnia	16%
Nasal Congestion	15%
Bi Polar Disorder	15%
Birth Control	15%
Erectile Dysfunction	13%
Hypertension	13%

Medical Conditions	Google Users
Alzheimers	11%
Toenail Fungus	11%
Hair Loss	11%
Osteoarthritis	10%
Anti-Wrinkle	10%
Eczema	10%
Anemia	9%
Estrogen	9%
IBS	9%
Psoriasis	8%
Hepatitis	7%
Herpes	6%
Blood Thinner	6%
Crohns Disease	6%
HIV	5%
Epilepsy	5%
Schizophrenia	4%
Other	17%
None of the above	3%

N=219

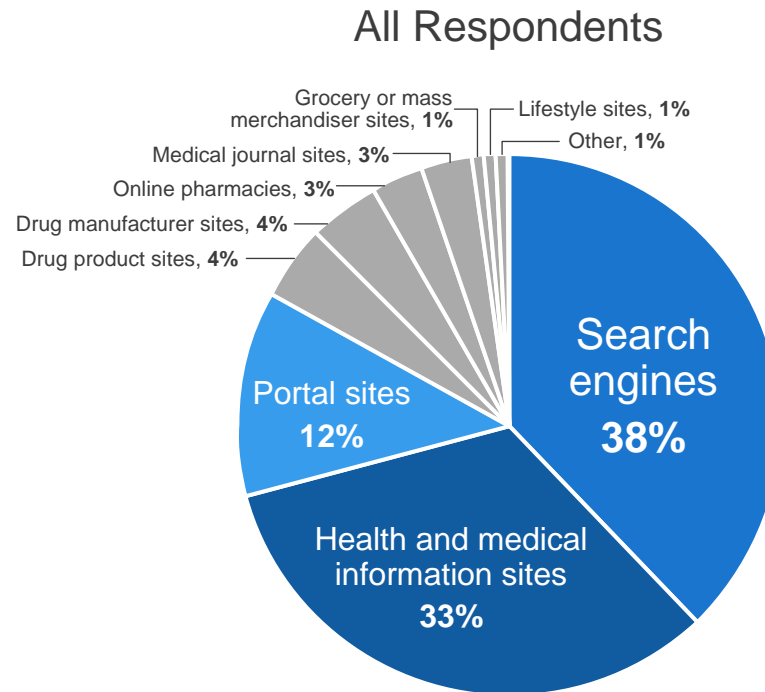
Please tell us which, if any, of the following medical conditions you have used a search engine to help you research. Select all that apply.

In addition to search engines, three-quarters (74%) of users also use health and medical information sites



When looking for information on healthcare information online, what kinds of sites do you normally use in addition to search engines? Select all that apply.

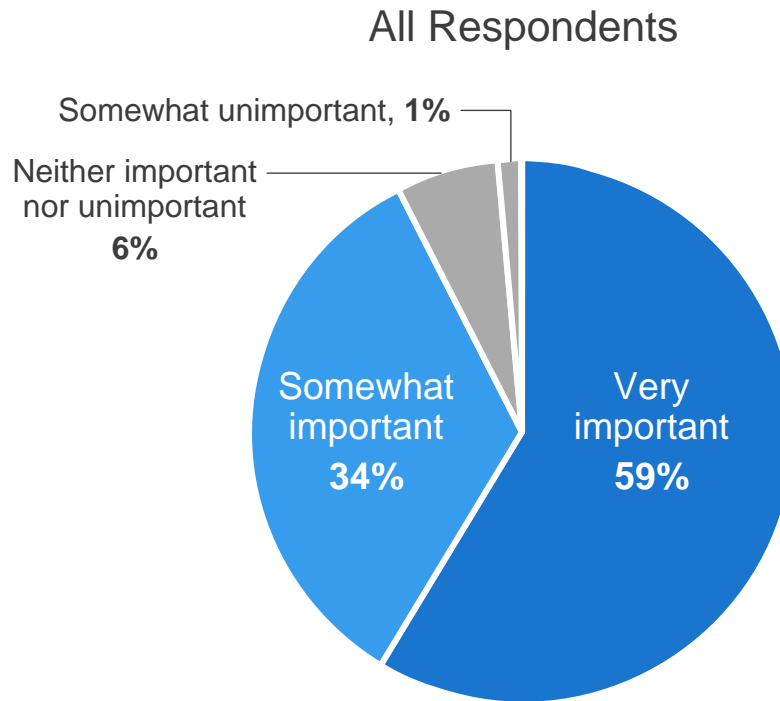
More than any other online resource, users go to search engines **first** (38%) for health information



N=278

Including search engines, which type of online resource is your **FIRST STOP** for finding healthcare information online?

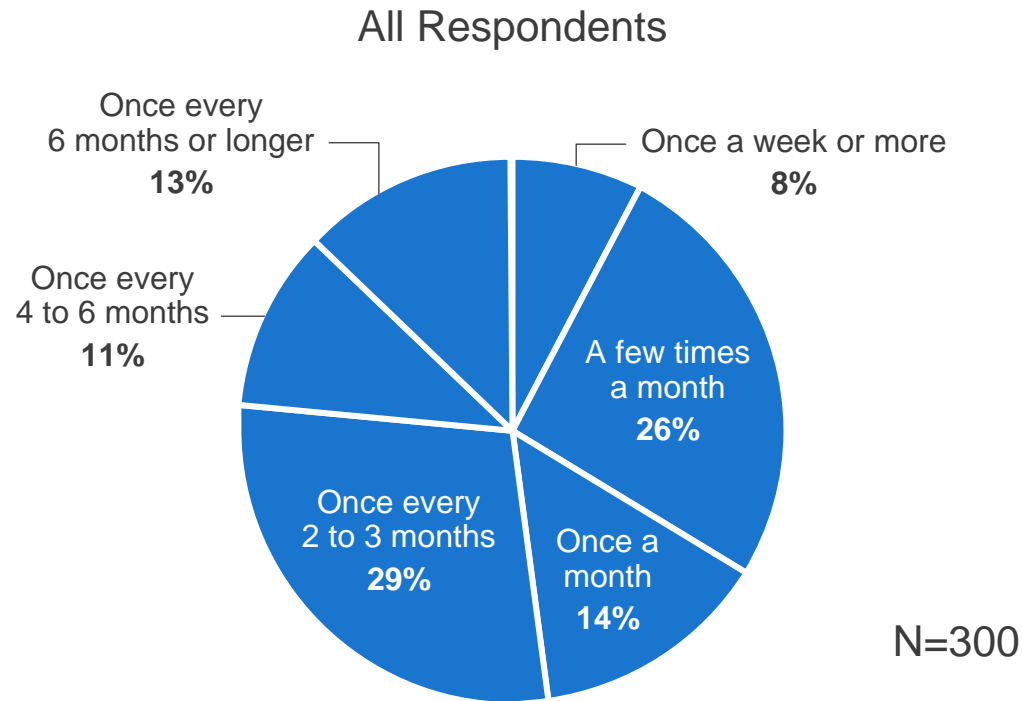
The vast majority of users (94%) find search engines very important or somewhat important for health-related research and purchase



N=278

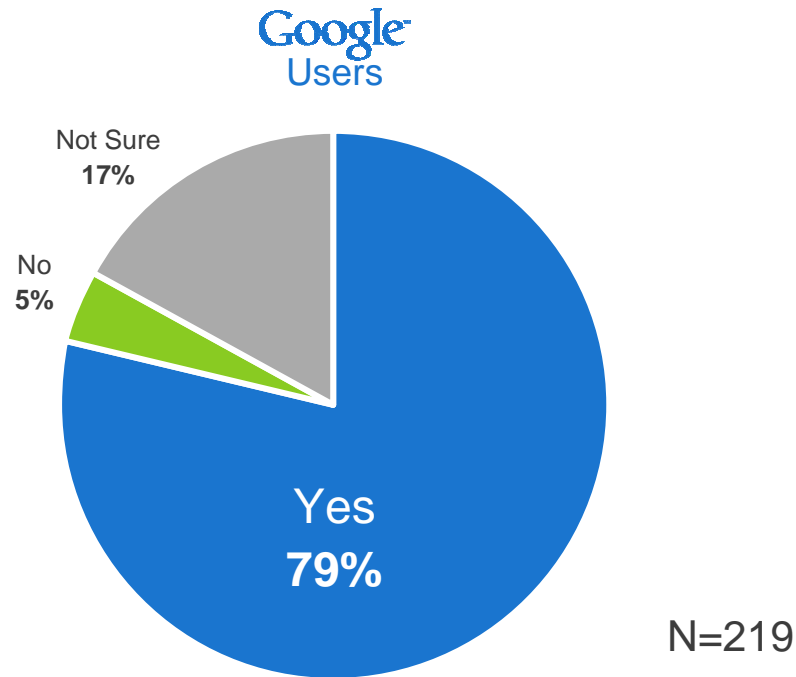
Overall, how important is using a search engine to helping you research and/or purchase healthcare products and information?

Search engines are a frequently-used resource for health information research – used **at least once a month** by 48% of users



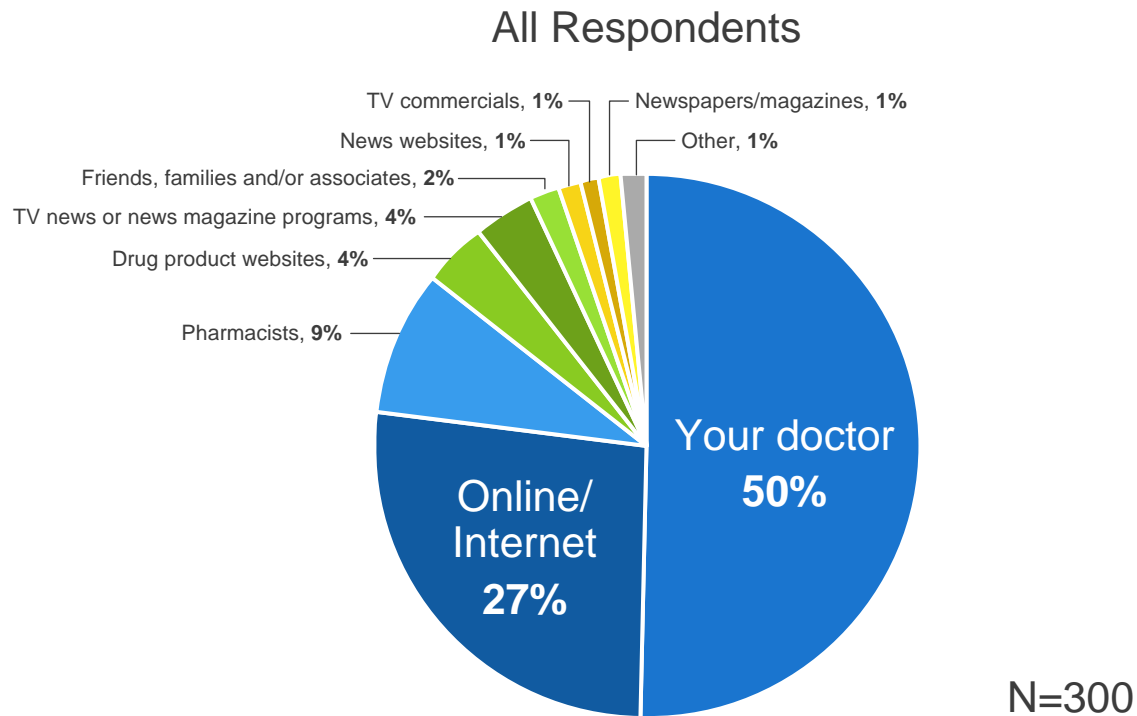
How often do you research healthcare information online?

Over three-quarters (79%) of users believe online prescription drug information helps patients comply with their treatments



Do you think the availability of online information about prescription drugs helps patients comply with their prescribed treatment?

The Internet is the second most-preferred resource for health information, trailing only doctors and leading all other offline and online resources

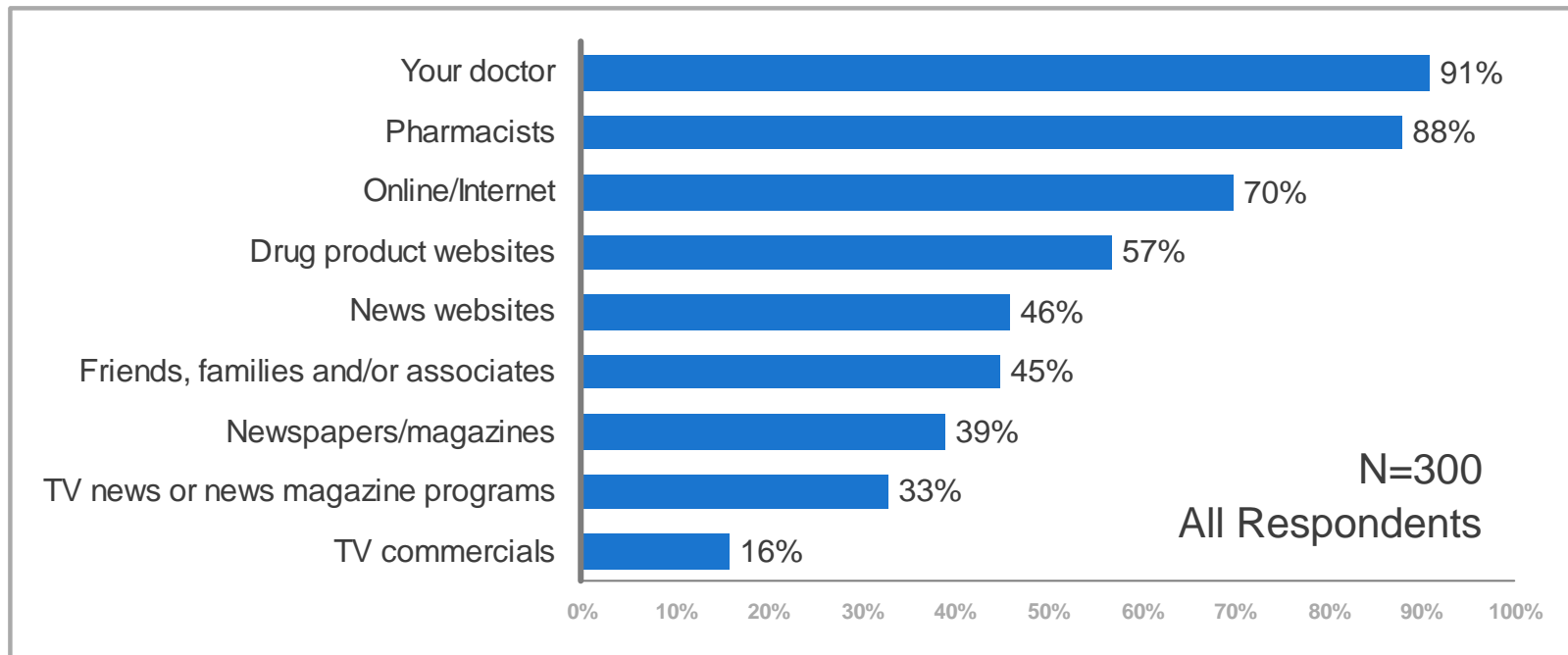


Thinking of offline as well as online resources, how do you prefer to get health information?



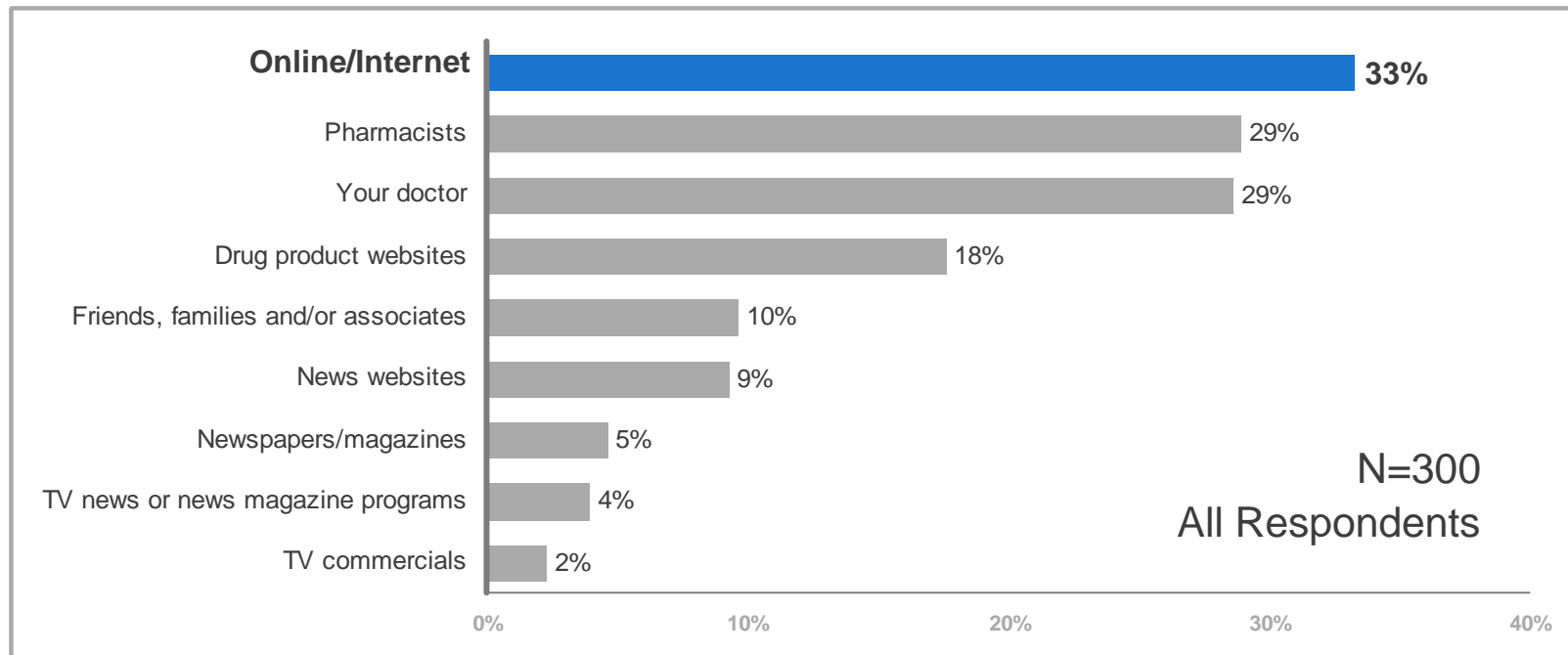
Users consider the Internet a **highly-trustworthy source** for health information, trailing only doctors and pharmacists

(Respondents who indicated a “4” or “5” on a 5-point scale)



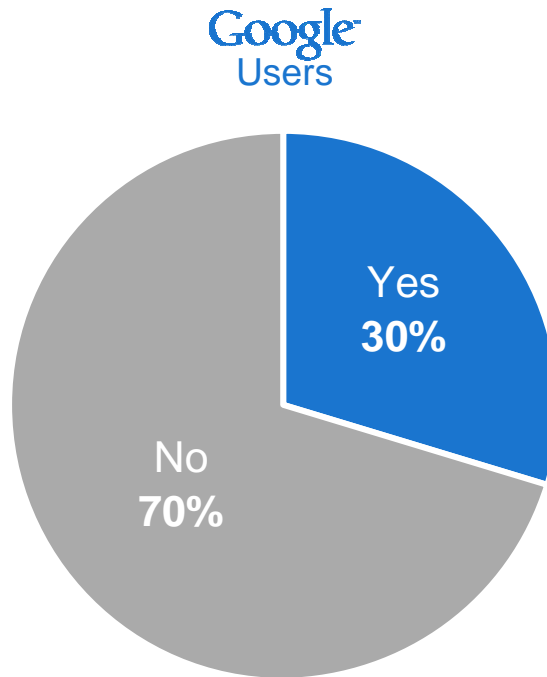
On a 5-point scale, where “5” means “Very Trustworthy” and “1” means “Not at All Trustworthy,” how trustworthy is each of the following resources for providing healthcare information? Select one per each row.

One-third (33%) of users thought they would use online medical and healthcare resources more often in the future  
(Respondents who indicated “More Often”)



In the future, would you say you'll be using each of the following resources “More Often,” “Less Often” or “About the Same” for healthcare products and information? Select one per each row. (Respondents who indicated "More Often")

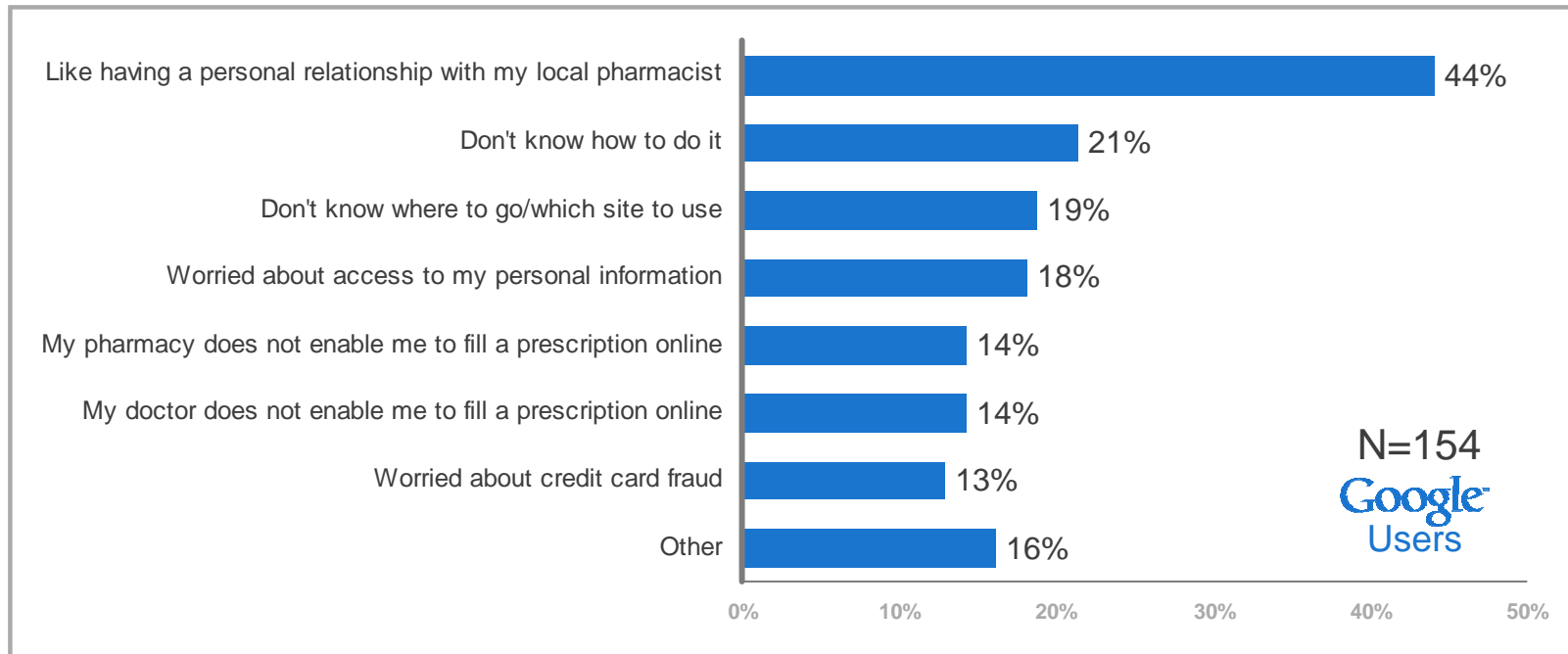
Almost one-third (30%) of Google users have filled a prescription online, while 70% have not



N=219

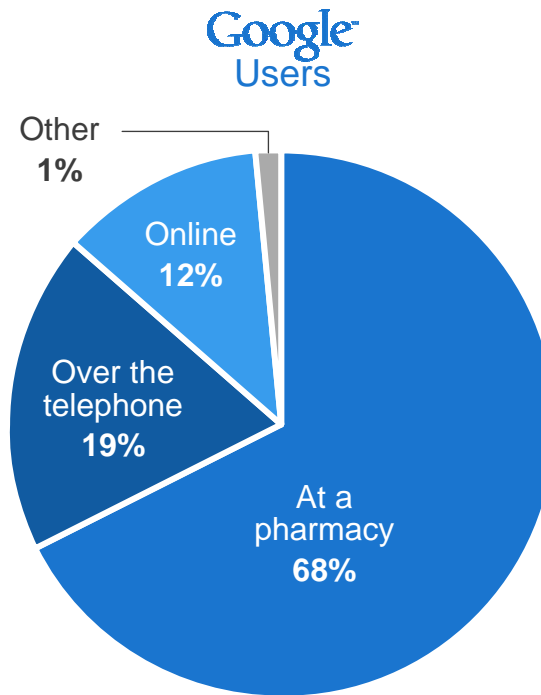
Have you ever filled a prescription online?

**Preference for a local pharmacist** is top reason why users don't fill prescriptions online (44%); not knowing how to do it (21%) and not knowing which site to use (19%) are also prominent reasons



Why haven't you ever filled a prescription online? Please select all that apply.

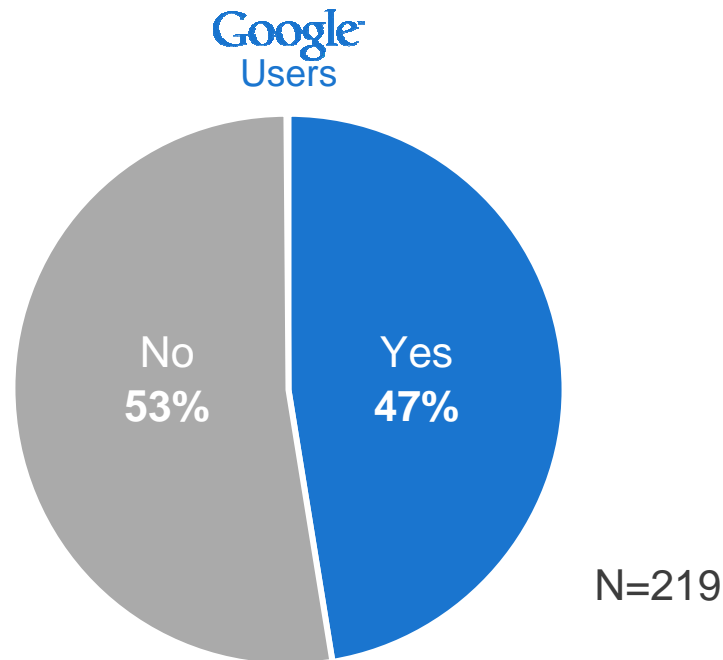
Over one-tenth (12%) of users filled their most recent prescription online, yet over two-thirds (68%) filled it at a pharmacy



N=219

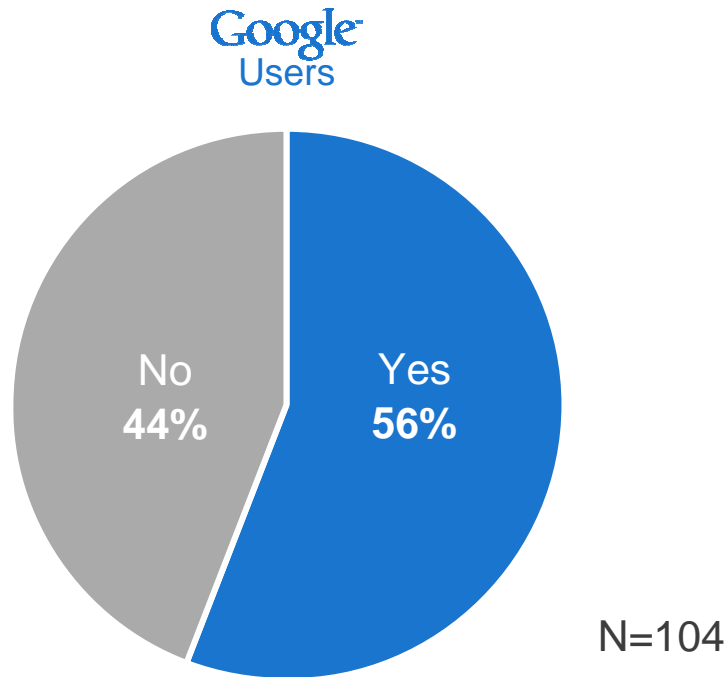
How did you fill your most recent prescription?

Online health information has **strong offline effects** – nearly one-half (47%) of users have approached a doctor about a medication or treatment after learning about it online.



Have you ever approached your doctor about a prescription medication or treatment condition you had learned about online?

Among those who approached their doctor after learning about a medication or condition online, over half (56%) received a prescription



You indicated that you approached your doctor about a prescription medication or treatment condition you learned about online. Did this discussion with your doctor result in him/her writing you a prescription for a medication?

# Respondent Demographics

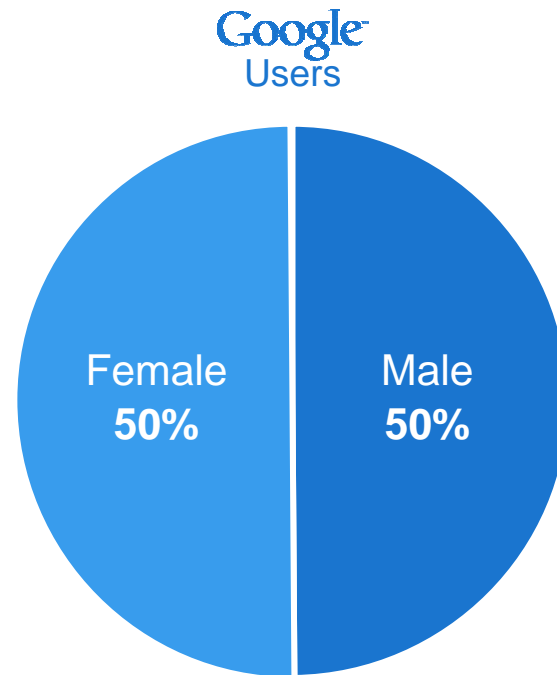




## **We surveyed a total of 300 consumers that use the web to research and/or purchase Rx drugs, medical conditions, and treatment options**

- A custom survey instrument (i.e., questionnaire) was developed to measure respondents' use of the web, and search engines in particular, for researching and/or purchasing Rx drugs, medical conditions and treatment options
- The survey was conducted online, through a web-based interviewing process, in March 2005
- Respondents were drawn from a consumer research panel developed through a variety of methods: web advertising, permission-based databases, public relations, telephone recruitment, partner-recruited panels, and alliances with heavily trafficked portals
- Our sample is evenly distributed across all age groups and genders
- The survey was conducted by Global Market Insite (GMI) an international panel research company, in collaboration with Media-Screen, an independent market research firm

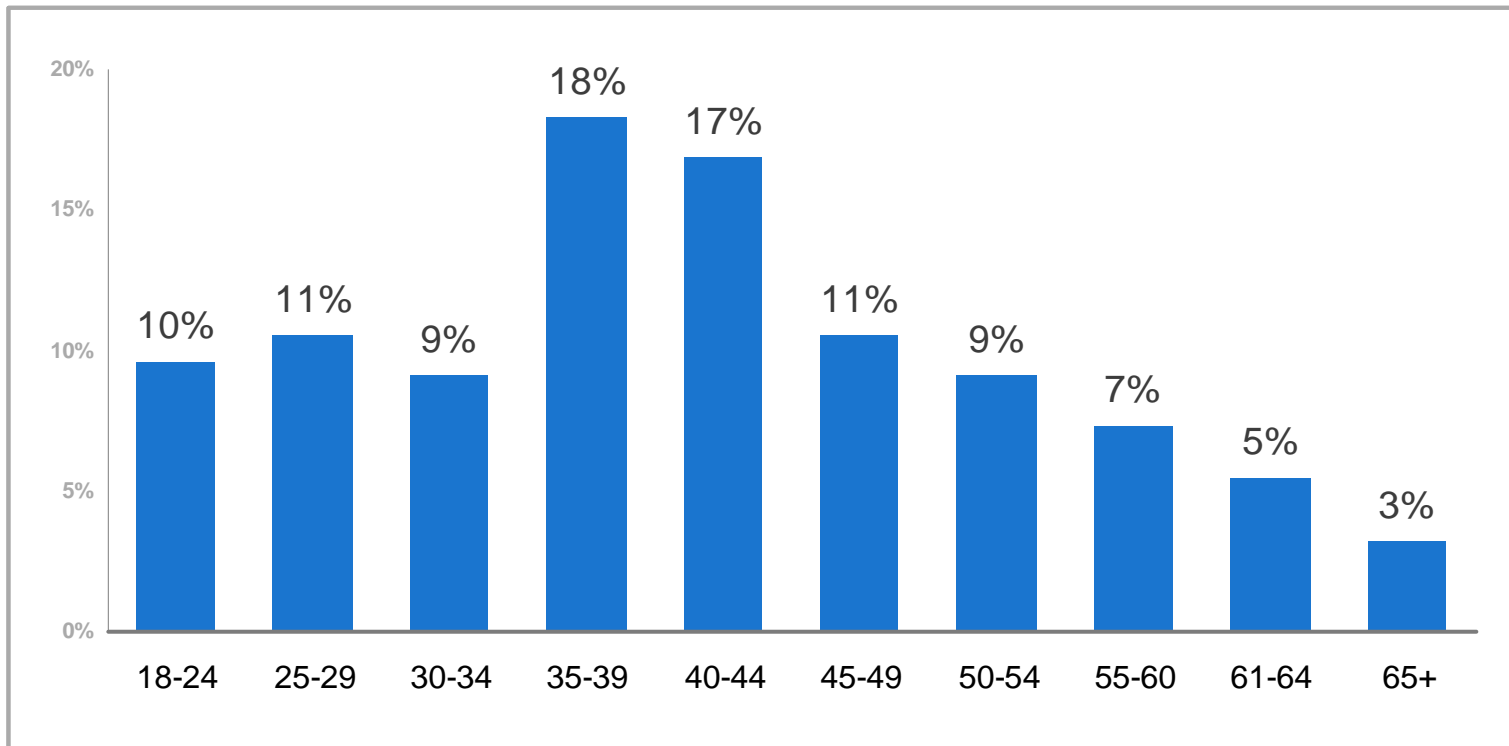
Our sample of Google users is evenly divided between men and women



N=219

Please indicate your gender.

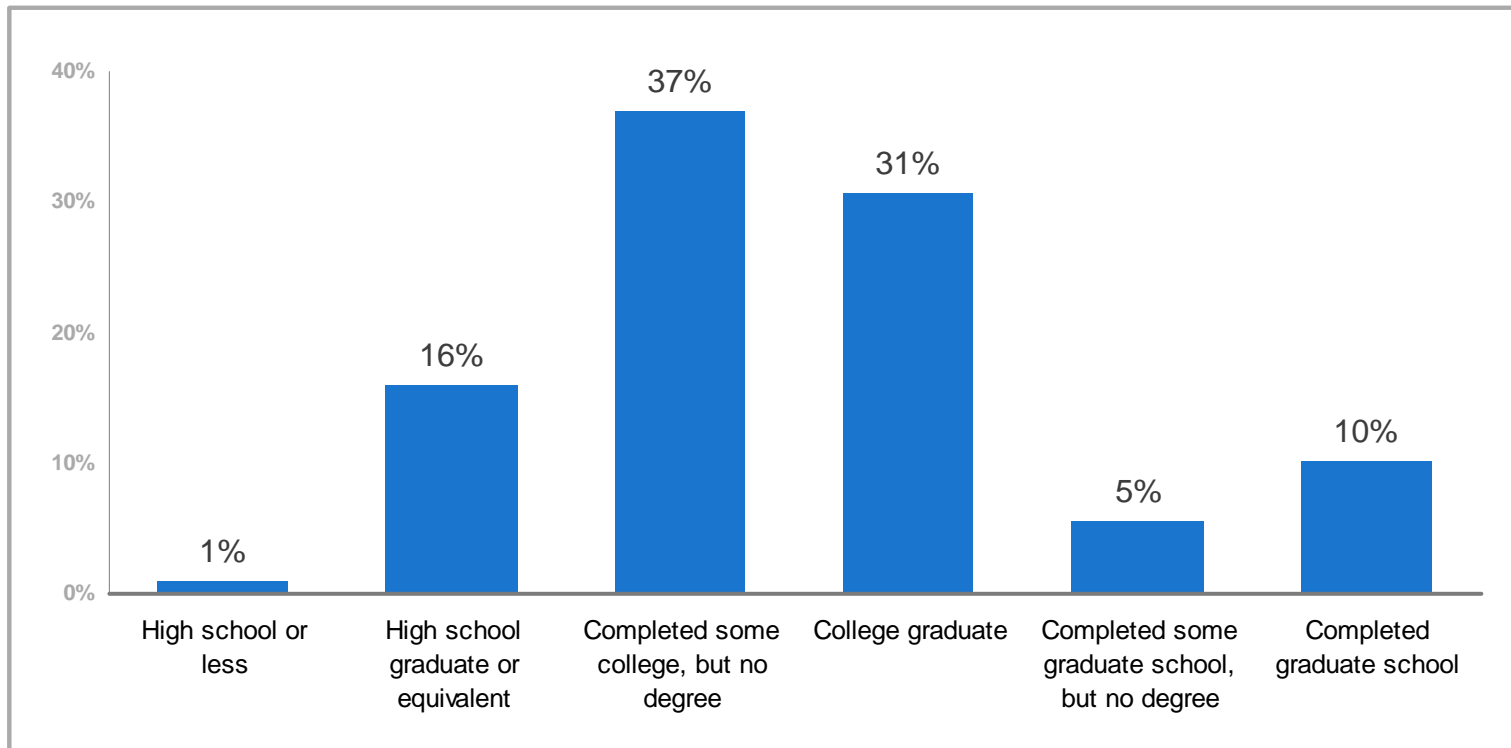
Our sample of Google users is divided across age groups as follows:



N=219

Please indicate your age.

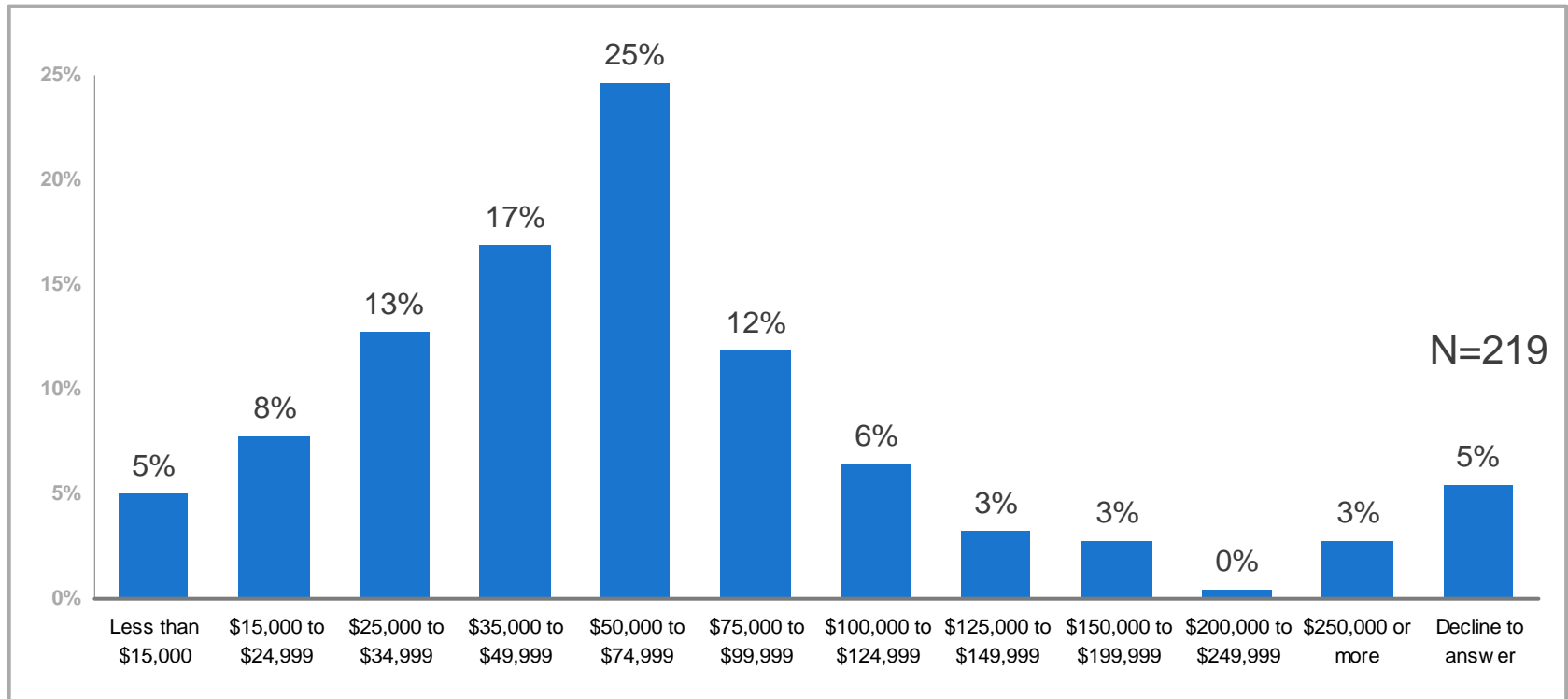
More than two-thirds (68%) of responding Google users had completed some college or were college graduates



N=219

What is the highest level of education you have completed?

Half of the participating Google users had income ranging between \$50K and \$199K



Which of the following income categories best describes your total 2004 household income before taxes?

Source: 2005 Health Care Survey, conducted by GMI and Media-Screen (Mar. 2005)