

HOW AMERICA SEARCHES: HEALTH AND WELLNESS

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Survey conducted by:
Opinion Research Corporation

KEY FINDINGS

- + **Internet is the most widely used resource for health information:** 59% of adults use online resources to obtain health and wellness information, versus 55% who go to their doctors and 29% who talk to relatives, friends or co-workers
- + **Doctors retain patients' trust:** When asked to name the top three sources they trust the most for information about health- and wellness-related questions, more than three-quarters of consumers named primary doctors as their most trusted resource, with specialist physicians coming in a distant second; trust in Internet resources, although the most widely used, is not yet proportionate to their overall popularity
- + **Social media increasingly relevant to health and wellness:** 34% of health searchers use social media resources to delve into health-related topics, with Wikipedia, and online forums and message boards the most important individual tools; as with other areas of interest, social media hold a particular appeal for 18-to-34 year old health searchers, while overall, men appear more likely than women to use online social media to research health and wellness issues
- + **Consumer-generated content appeals to consumers in decision mode:** Usage of social media tools and resources tends to align with research into topics that will factor heavily in a healthcare choice, such as care services, costs associated with procedures and medical equipment, and the reputation of a doctor or care facility
- + **Online activity revolves around symptoms, treatment and diseases:** Symptoms, courses of treatment, and diseases and conditions are by far the main focus of consumer attention online, with 84% of health searchers turning to online social spaces to educate themselves about a disease or a condition; surprisingly, the healthcare side of health and wellness matters – insurance providers, doctors, care facilities and pharmaceutical companies – elicits far less search activity on the part of online adults
- + **Search engines are the gateway for online health information:** Two-thirds of online adults have used general search engines (e.g. Google, Yahoo!, MSN and Ask) to find health-related information, making them the default gateway for this as well as many other topics; usage of health-specific search engines – such as Healia, Medstory, Feath, Kosmix and Healthline – is minimal by comparison

INTRODUCTION

To say that healthcare is the lifeblood of a society is an understatement in many respects. The sheer costs associated with keeping the U.S. healthy defy imagination: national health expenditures reached \$2 trillion in 2005, the latest year for which government statistics are available, and they are projected to double by 2015, reaching 20 percent of the gross domestic product. Rising costs on everything from health insurance premiums to prescription drugs to care services makes managing health and wellness decisions an issue of critical importance to most consumers. At the same time, consumers are taking (or being required to take) more control over managing their personal health.

Thanks in no small part to the Internet, consumers have access to an increasingly-vast store of information about everything from symptoms and diseases to doctors and medical practices to medication and pharmaceutical companies. However, to fulfill many health needs, consumers must still visit a doctor's office, pharmacy or medical facility, making for a complex multi-channel state of affairs. To better understand the nexus of online and offline, iCrossing commissioned Opinion Research Corporation (ORC) to conduct a survey of U.S. adults (ages 18 and above) in December 2007, concentrating on the resources that consumers prefer and trust most to obtain health and wellness-related information, the topics for which they regularly search online and the degree to which consumers turn to each other for help with key health-related decisions.

The picture that emerges is one in which consumers have grown dependent on the Internet for information but still rely on healthcare professionals – their doctors in particular – when it comes to making important decisions about their health, such as whether or not to take a prescription medication. With health and wellness as with many of the other topics iCrossing has explored in previous *How America Searches* studies, search engines are the gateway to satisfying consumers' information needs. Similarly, online social media resources, particularly when considered in aggregate, are growing in importance, with usage strongly correlated with searches on topics such as care services, doctors and medical practices, wellness issues, alternative medicine and vitamins and supplements. Consumer-generated content and social networks also attract people who go online to, among other goals, find a doctor to treat a specific condition or research the reputation of a doctor or healthcare facility. In short, while consumers continue to trust the advice of their doctors on health and wellness issues, they also look to online social media to obtain information and share experiences with fellow consumers on topics that directly affect their healthcare choices.

PAGING DR. WEB!

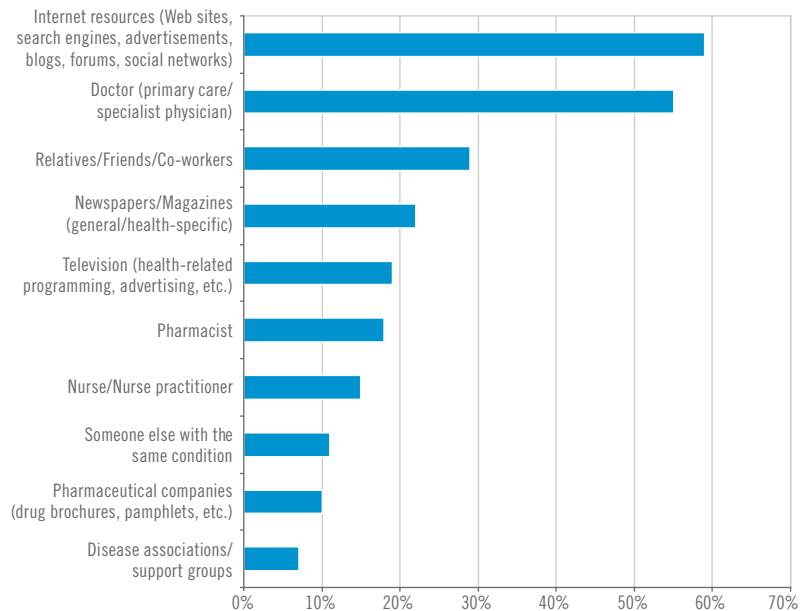
The Internet tops doctors as the go-to resource for information about health- and wellness-related topics. Whereas 55 percent of online adults ask their physician for health- and wellness-related information, 59 percent resort to Internet-based resources, including Web sites, search engines, online advertisements, blogs, forums and social networks. The migration of drug, doctor and disease information online, coupled with the ways in which the Internet facilitates communication between people who share similar conditions or health issues, helps to explain the growing prominence of “Dr. Web”.

SOURCES USED TO FIND OR ACCESS HEALTH- AND WELLNESS-RELATED INFORMATION IN THE PAST 12 MONTHS

Which of the following resources have you used to find or access health- and wellness-related information in the past 12 months? Please select all that apply.

Base: All respondents (n=1,084)

Source: iCrossing



As might be expected, a generational (and, to a lesser extent, gender) divide exists between those who prefer to go to their doctors and those who resort to the Web. Consumers ages 55 and older are considerably more likely than average to rely on their doctors for health and wellness information. At the same time, usage of the Web by adults ages 55 to 64 is actually slightly higher than average, while those over the age of 65 are less likely than average to consult Internet health and wellness resources. The age group demonstrating the lowest incidence of usage of the Internet to find health and wellness information is 45-to-54 year olds.

Women look to physicians to a far greater extent than men (61 to 48 percent). However, they also are more likely than men to consult Internet resources (63 to 54 percent) and generally use a wider variety of resources than other demographic groups to manage their health.

More unexpected is that all other resources lag far behind doctors and the Internet, including media mainstays (newspapers, magazines and TV) as well as “human” resources like relatives, friends and co-workers, pharmacists, nurses and nurse practitioners and other people with the same condition. Pharmaceutical companies also ranked at near the back of the pack, cited by just 10 percent of respondents as a resource they use to get health- and wellness-related information.

SOURCES USED TO FIND OR ACCESS HEALTH- AND WELLNESS-RELATED INFORMATION IN THE PAST 12 MONTHS, BY GENDER, AGE AND EDUCATIONAL ACHIEVEMENT

Which of the following resources have you used to find or access health- and wellness-related information in the past 12 months? Please select all that apply.

Base: All respondents (n=1,084)

Source: iCrossing

	INTERNET RESOURCES	DOCTOR	RELATIVES/FRIENDS/CO-WORKERS	NEWSPAPERS/MAGAZINES	TELEVISION	PHARMACIST	NURSE/NURSE PRACTITIONER	SOMEONE ELSE W/SAME CONDITION	PHARMACEUTICAL COMPANIES	DISEASE ASSOCIATIONS/SUPPORT GROUPS
Men	54%	48%	28%	19%	21%	18%	12%	9%	9%	6%
Women	63%	61%	31%	24%	17%	18%	18%	13%	11%	8%
18-34	65%	46%	45%	21%	26%	16%	18%	19%	9%	5%
35-54	54%	50%	27%	20%	19%	17%	14%	7%	10%	8%
55+	56%	69%	16%	24%	11%	22%	14%	8%	11%	8%
High school or less	48%	50%	27%	14%	19%	15%	11%	9%	3%	4%
College incomplete	61%	52%	32%	21%	20%	19%	16%	13%	12%	5%
College graduate+	62%	62%	27%	27%	17%	19%	17%	9%	11%	12%

PHYSICIANS STILL RETAIN PATIENTS' TRUST

The Internet may be the leading information source, but when trust is factored in, doctors, specifically primary care physicians, still command a healthy degree of respect from consumers. When asked to name the top three sources they trust the most for information about health- and wellness-related questions, over three-quarters of consumers surveyed (77 percent) named primary doctors as their most-trusted resource, with specialist physicians coming in a distant second, at 55 percent, followed by nurses and nurse practitioners (37 percent) and pharmacists (36 percent).

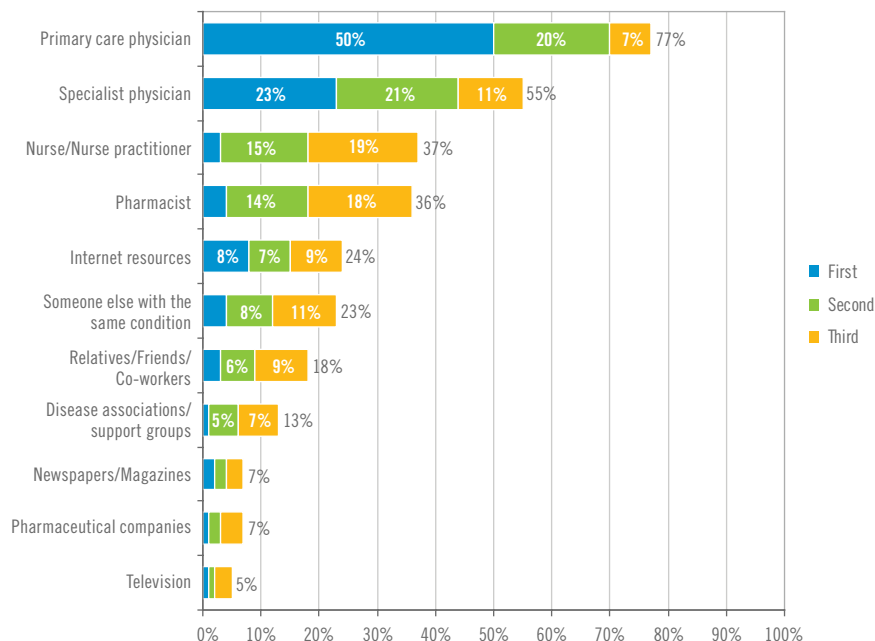
Trust in Internet resources, although these are the most widely used, is not commensurate with their overall popularity, suggesting that consumers may obtain information from the Web but still go to their doctors for confirmation or affirmation. Unlike the situation with resource usage, trust generally is not dependent on age or gender. The main exception is adults over the age of 65, who demonstrated lower-than-average levels of trust in online resources (and correspondingly higher levels of trust in both primary care doctors and specialists). As might be expected, more frequent online searches (those done on a weekly basis) for health and wellness information correlate with higher trust in Internet health resources.

MOST TRUSTED SOURCES OF INFORMATION ABOUT HEALTH- AND WELLNESS-RELATED ISSUES AND QUESTIONS

Overall, which of the following sources do you trust the first/second/third most for information about health and wellness-related issues and questions? Please select one answer for each.

Base: All respondents (n=1,084)

Source: iCrossing



Trust in medical professionals extends to their influence on consumers' decisions about whether or not to take prescription drugs, with adults most likely to rely on suggestions from their doctor, pharmacist, or a nurse or nurse practitioner. Large numbers also assert that others who share the same condition, disease association, and support groups and Internet resources are important sources.

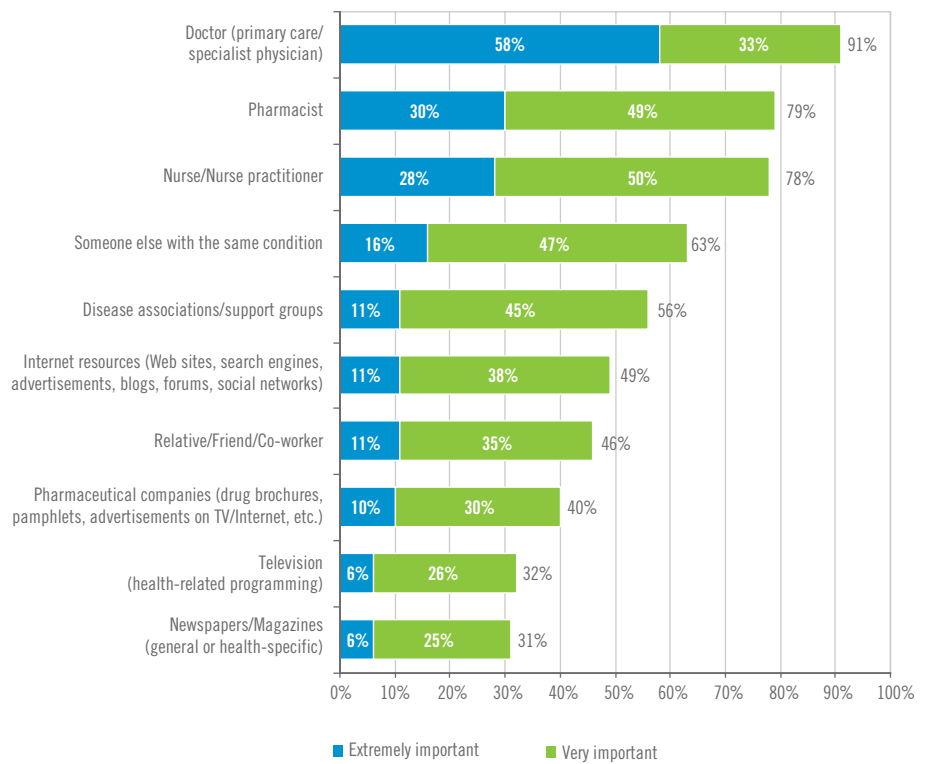
In general, older adults are notably more reliant on the word of medical professionals, while younger adults are open to suggestions and advice from a wider variety of sources. It also bears noting that 18-to-24 year olds in particular are considerably more likely than others to be influenced by traditional media (print and TV) as well as materials issued by pharmaceutical companies, including brochures and pamphlets for prescription drugs and TV or online advertisements.

IMPORTANCE OF SOURCES INFLUENCING PRESCRIPTION MEDICATION DECISIONS

If you had to determine what sources contribute to your decision whether or not to take a prescription medication, how important would a suggestion from each of the following sources be to you? Please select one answer for each.

Base: All respondents (n=1,084)

Source: iCrossing



**HEALTH MONITORING A
REGULAR ONLINE ACTIVITY**

For most people, going online to find health and wellness-related information is a monthly activity. More than 60 percent of respondents say they look for or access online health resources at least monthly, while 45 percent say they do so more than once a month, with this group split evenly between those who search online for health information weekly or more often and those who do so two to three times per month.

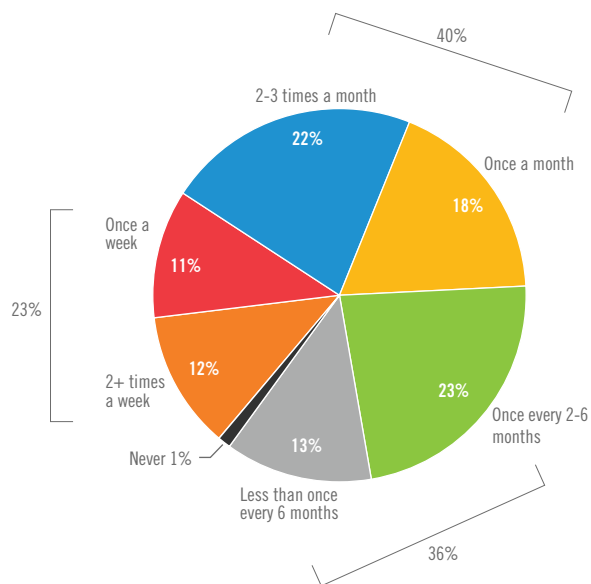
Interestingly, at 58 percent, members of the youngest age group surveyed (18-to-24 year olds) are significantly more likely than average to search online for health information more than once a month, while 25-to-34 year olds are the least likely to conduct health and wellness-related searches more than once a month, at 37 percent. Those who go online less often to look for health- and wellness-related information tend to be more reliant on advice from medical professionals than other resources.

FREQUENCY OF SEARCHING FOR HEALTH- AND WELLNESS RELATED INFORMATION ONLINE

How often do you generally search for health- and wellness-related information online? Please select one answer.

Base: Respondents who have used Internet resources to find or access health- and wellness-related information in the past 12 months (n=644)

Source: iCrossing



SYMPTOMS, TREATMENT AND DISEASES TOP SEARCH TOPICS

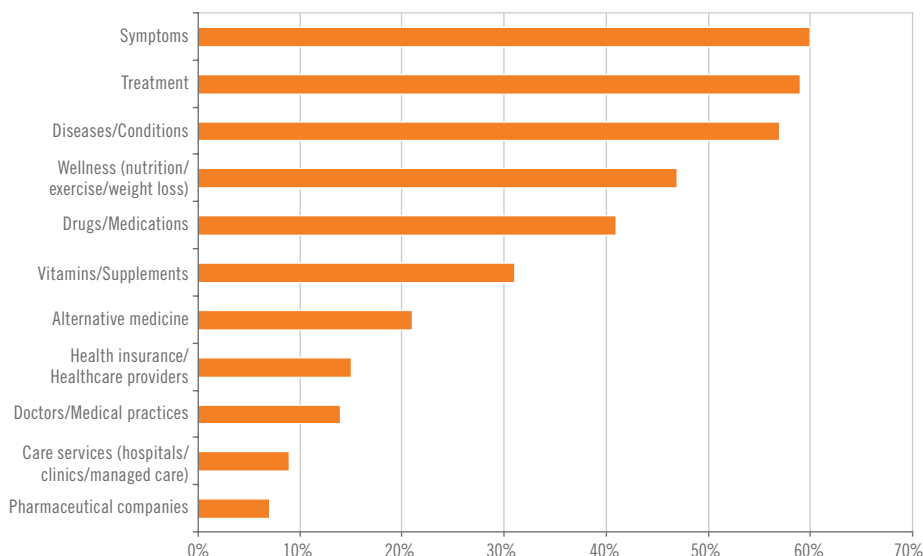
Consumers search for a broad range of health- and wellness-related topics online, but symptoms, courses of treatment and diseases and conditions are by far the main focus of their attention. Wellness topics such as nutrition, exercise and weight loss and drugs and medications constitute a second tier of interest, followed by vitamins and supplements and alternative medicine. The healthcare side of health and wellness matters surprisingly elicits less search activity on the part of online adults. Health insurance providers, doctors, care services such as hospitals and clinics and pharmaceutical companies comprise the bottom rung in terms of the topics for which consumers search online.

TYPES OF HEALTH- AND WELLNESS-RELATED TOPICS SEARCHED FOR ONLINE

What type(s) of health- and wellness-related topics do you search for online? Please select all that apply.

Base: Respondents who have used Internet resources to find or access health- and wellness-related information in the past 12 months and who have ever searched for them online (n=633)

Source: iCrossing



Several notable demographic disparities emerge with regard to consumers' health-related searching activity:

- + Women are significantly more likely than men to search for information about symptoms, treatment regimens, diseases and conditions and drugs/medications;
- + Men, on the other hand, are more likely than women to conduct topical searches about vitamins and supplements, health insurance providers and doctors, while searches for wellness-related topics are evenly split between men and women;
- + Younger audiences (18-to-34 year olds) are more likely than average (and more likely than older adults) to search for information about symptoms online but less likely than average to search for topics around diseases and conditions, while adults over the age of 45 tend to be the most focused on looking for disease-related information;
- + Wellness, meanwhile, appears to be a topic that appeals predominantly to the young, with 62% of 18-to-24 year olds looking for information about topics such as nutrition, exercise and weight loss.

DEMOGRAPHIC PROFILE OF ONLINE HEALTH AND WELLNESS SEARCHERS BY TOPICS SEARCHED FOR ONLINE

What type(s) of health- and wellness-related topics do you search for online? Please select all that apply.

Base: Respondents who have used Internet resources to find or access health- and wellness information in the past 12 months and who have ever searched for them online (n=633)

Source: iCrossing

	TOTAL	SYMPTOMS	TREATMENT	DISEASES/ CONDITIONS	WELLNESS	DRUGS/ MEDICATIONS	VITAMINS/ SUPPLEMENTS	ALTERNATIVE MEDICINE	HEALTH INSURANCE/ HEALTHCARE PROVIDERS	DOCTORS/ MEDICAL PRACTICES	CARE SERVICES
Male	48%	38%	41%	38%	43%	40%	50%	42%	53%	51%	49%
Female	52%	62%	59%	62%	57%	60%	50%	58%	47%	49%	51%
Average age	44	42	43	46	41	45	44	43	44	40	36
Married	47%	51%	49%	52%	44%	52%	46%	45%	54%	59%	51%
Children under 18 at home	32%	39%	39%	31%	37%	32%	34%	42%	45%	47%	57%
High school or less	22%	18%	17%	17%	14%	17%	13%	11%	10%	15%	13%
College incomplete	46%	49%	45%	45%	48%	47%	49%	51%	38%	36%	43%
College graduate+	32%	33%	38%	39%	38%	36%	38%	37%	52%	49%	44%
Employed	56%	57%	60%	53%	62%	53%	59%	58%	64%	60%	75%
Average household income	\$51,600	\$54,900	\$54,400	\$53,100	\$56,300	\$53,800	\$52,800	\$54,400	\$55,900	\$61,300	\$54,900

In terms of online topical search activity, some strong correlations exist between:

- + Exploration of symptoms and interest in medications, diseases, treatment, doctors, care services and alternative medicine;
- + Interest in wellness topics, alternative medicine, and vitamins and supplements.

Correspondingly, people who conduct searches for information about treatment also demonstrate higher-than-average likelihood to look for information about symptoms, doctors, medications and alternative medicine, care services, and diseases, with a similar pattern evident for those looking for disease-related topics.

**SYMPTOMS AND DISEASES
DRIVE CONSUMERS ONLINE**

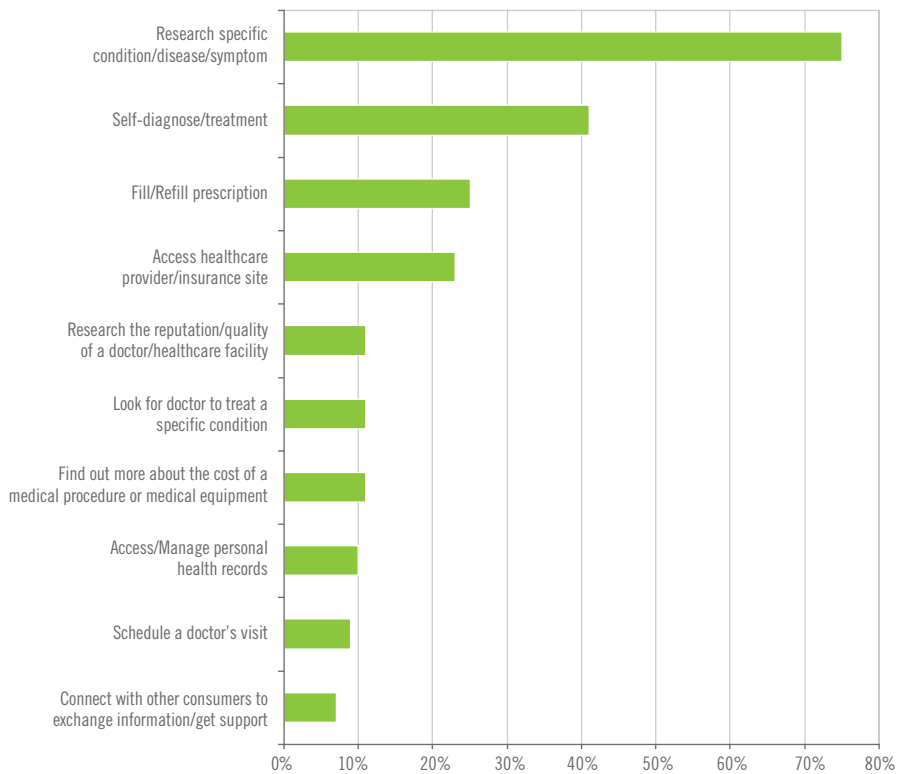
Just as consumers search for a broad range of health- and wellness-related topics, a variety of health-related factors drive them to go online. The standout is researching a specific condition, disease or symptom. In the past year, fully 75 percent of healthcare searchers have been prompted to go online to investigate symptoms or conditions, well ahead of the 41 percent who have resorted to the Web to self-diagnose or self-treat a condition. Women are far likelier than men to go online to research conditions and symptoms, while, as might be expected, older consumers, especially those over the age of 55, are considerably more likely than younger adults to conduct this type of research online.

HEALTH- AND WELLNESS-RELATED FACTORS PROMPTING CONSUMERS TO GO ONLINE IN THE PAST 12 MONTHS

Which of the following health- and wellness-related factors led you to go online in the past 12 months? Please select all that apply.

Base: Respondents who have used Internet resources to find or access health- and wellness-related information in the past 12 months and who have ever searched for them online (n=633)

Source: iCrossing



The only other factors driving healthcare searchers to the Web that could be considered mainstream are (re)filling a prescription, at 25 percent, and accessing a healthcare provider or health insurance Web site, at 23 percent. At this point, relatively few healthcare searchers are going online to investigate the reputation of doctors or hospitals or using the Internet to schedule appointments or manage their health information.

SEARCH ENGINES ARE THE LEADING ONLINE HEALTH RESOURCE

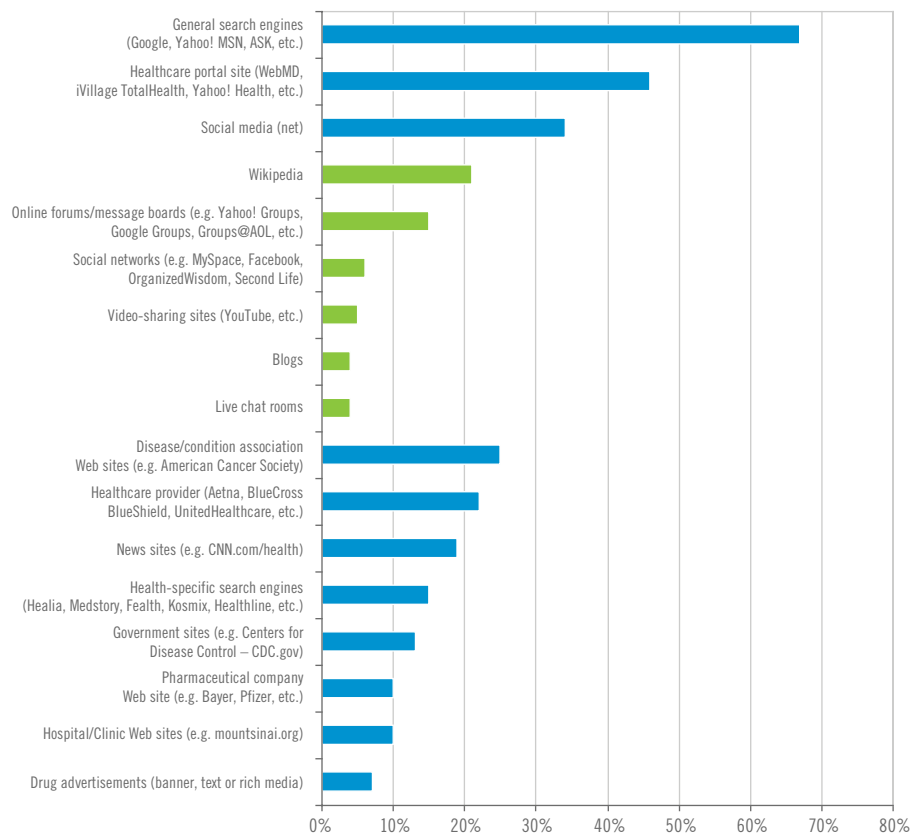
As with many other areas of consumer interest, search engines are the gateway to information about health and wellness topics. Two-thirds of online adults have used general search engines (e.g. Google, Yahoo!, MSN, Ask and the like) in the past 12 months, well ahead of the 46 percent who have navigated to healthcare portals like WebMD. It bears noting that the widespread usage of search engines does not extend to health-specific engines such as Healia, Medstory, Fealth, Kosmix and Healthline, which were cited by only 15 percent of respondents as resources for locating health information. A third tier of resources is composed of disease association Web sites, such as that of the American Cancer Society, healthcare provider sites, the online encyclopedia Wikipedia, and news sites like CNN.com/health.

ONLINE TOOLS, SERVICES AND RESOURCES USED TO LOCATE OR ACCESS HEALTH- AND WELLNESS-RELATED INFORMATION IN THE PAST 12 MONTHS

Which of the following online tools, services and resources have you used to locate or access health- and wellness-related information in the past 12 months? Please select all that apply.

Base: Respondents who have used Internet resources to find or access health- and wellness-related information in the past 12 months and who have ever searched for them online (n=633)

Source: iCrossing



SOCIAL MEDIA VITAL FOR SHARING INFORMATION ON TOPICS AFFECTING HEALTHCARE DECISIONS

The dominance of mainstream search engines and portal sites is to be expected, as both constitute well-established online tools that have earned the trust of large audiences. More notable is the emergence of online social media – comprised here of Wikipedia, social networks (including health-specific communities such as OrganizedWisdom as well as mainstream sites like MySpace, Facebook and Second Life), video-sharing sites like the popular YouTube, blogs, live chat rooms and online forums and message boards (Yahoo! Groups, Google Groups, Groups@AOL and the like) – as an important resource for consumers researching health and wellness topics. This finding mirrors results from recent *How America Searches* studies of the online retail and political arenas, which showed consumer-generated content and social networks to be vital to consumer decision-making.

Collectively, 34 percent of health searchers use social media resources to delve into health and wellness topics, with Wikipedia and online forums and message boards the most important individual tools for online adults. As with other areas of interest, social media hold a particular appeal for consumers ages 18-to-34, while overall, men appear more likely than women to use online social media to research health and wellness issues. Although household income appears to have little bearing on usage of social media resources, the presence of children does correlate with greater-than-average usage of consumer-generated content, strongly intimating that parents are learning about online communities from their teens and ‘tweens.

DEMOGRAPHIC PROFILE OF ONLINE HEALTH AND WELLNESS SEARCHERS BY TOOLS, SERVICES AND RESOURCES USED IN THE PAST 12 MONTHS

Which of the following online tools, services and resources have you used to locate or access health- and wellness-related information in the past 12 months? Please select all that apply.

Base: Respondents who have used Internet resources to find or access health- and wellness-related information in the past 12 months and who have ever searched for them online (n=633)

	TOTAL	SEARCH ENGINES	HEALTHCARE PORTAL SITES	DISEASE/CONDITION ASSOCIATION WEB SITES	HEALTHCARE PROVIDER SITES	SOCIAL MEDIA
Male	48%	45%	41%	39%	44%	48%
Female	52%	55%	59%	61%	56%	52%
Average age	44	44	45	46	45	37
Married	47%	50%	51%	57%	58%	43%
Children under 18 at home	32%	36%	31%	36%	36%	40%
High school or less	22%	17%	17%	12%	12%	19%
College incomplete	46%	49%	45%	44%	42%	47%
College graduate +	32%	34%	38%	44%	46%	34%
Employed	56%	59%	58%	52%	69%	63%
Average household income	\$51,600	\$54,900	\$54,700	\$57,200	\$59,100	\$53,900

Use of social media tools and services appears to have an especially strong correlation with searches on the following topics: care services, doctors and medical practices, wellness issues, alternative medicine, and vitamins and supplements. Logically, those prompted to go online to connect with others to exchange information or get support are the most likely to avail themselves of social media.

Yet consumer-generated content is clearly finding other applications in the health space. It attracts people who go online to find a doctor to treat a specific condition, get more details about the cost of a procedure or equipment, access or manage their personal health records, research the reputation of a doctor or healthcare facility and self-diagnose or self-treat a condition. In short, consumers look to online social media to facilitate the sharing of information with others on topics that directly affect their healthcare decisions.

ONLINE TOOLS, SERVICES AND RESOURCES USED TO LOCATE OR ACCESS HEALTH- AND WELLNESS-RELATED INFORMATION IN THE PAST 12 MONTHS, BY AGE AND REASONS FOR GOING ONLINE

Which of the following online tools, services and resources have you used to locate or access health- and wellness-related information in the past 12 months? Please select all that apply.

Base: Respondents who have used Internet resources to find or access health- and wellness-related information in the past 12 months and who have ever searched for them online (n=633)

Source: iCrossing

	GENERAL SEARCH ENGINES	HEALTHCARE PORTAL SITES	SOCIAL MEDIA (NET)	DISEASE/ CONDITION ASSOCIATION SITES	HEALTHCARE PROVIDER SITES	NEWS SITES	HEALTH SPECIFIC SEARCH ENGINES	GOVERNMENT SITES	PHARMACEUTICAL COMPANY SITES	HOSPITAL/ CLINIC SITES	DRUG ADVERTISEMENTS
18-34	67%	37%	50%	18%	18%	21%	12%	12%	7%	11%	9%
35-54	62%	52%	33%	27%	24%	19%	16%	15%	10%	8%	5%
55+	72%	51%	15%	29%	25%	17%	15%	11%	14%	10%	8%

REASONS FOR GOING ONLINE	GENERAL SEARCH ENGINES	HEALTHCARE PORTAL SITES	SOCIAL MEDIA (NET)	DISEASE/ CONDITION ASSOCIATION SITES	HEALTHCARE PROVIDER SITES	NEWS SITES	HEALTH SPECIFIC SEARCH ENGINES	GOVERNMENT SITES	PHARMACEUTICAL COMPANY SITES	HOSPITAL/ CLINIC SITES	DRUG ADVERTISEMENTS
Research specific disease/ condition/symptom	72%	52%	33%	31%	23%	20%	16%	16%	11%	10%	8%
Self-diagnose/treatment	74%	50%	41%	25%	20%	22%	20%	15%	8%	11%	9%
Access healthcare provider/ health insurance site	76%	57%	34%	31%	55%	29%	19%	22%	15%	18%	7%
Look for doctor to treat a specific condition	76%	44%	52%	37%	42%	29%	19%	25%	12%	17%	10%
Schedule a doctor's visit	75%	51%	46%	29%	45%	31%	20%	23%	20%	23%	15%
Research the reputation/ quality of a doctor or healthcare facility	76%	54%	51%	42%	45%	41%	23%	33%	25%	23%	16%
Find out more about the cost of a medical procedure or medical equipment	77%	45%	55%	43%	46%	36%	24%	32%	30%	21%	24%
Fill/Refill a prescription	74%	47%	40%	37%	38%	23%	18%	22%	17%	18%	11%
Access/manage personal health records	76%	55%	56%	45%	45%	27%	19%	36%	26%	20%	13%
Connect with other consumers to exchange information or get support	74%	44%	75%	42%	43%	36%	28%	32%	22%	22%	26%

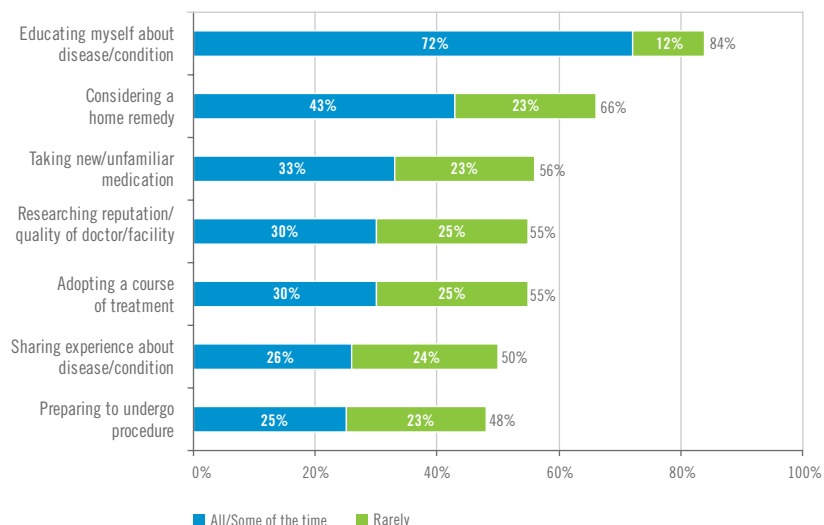
This tendency is borne from the frequency with which health and wellness searchers turn to fellow consumers as well as online social communities to educate themselves about a disease or a condition, or when they are considering a home remedy or facing the prospect of taking a new or unfamiliar prescription medication. These are instances in which the advice and experiences of others who have gone through similar situations become truly important. As with other social media usage patterns, younger adults, particularly those ages 18-to-34, are far more likely than older health searchers to avail themselves of user-generated content and online communities in all instances other than when preparing to undergo a course of treatment.

FREQUENCY OF TURNING TO ONLINE CONSUMER-GENERATED CONTENT OR ONLINE SOCIAL COMMUNITIES IN HEALTH- AND WELLNESS-RELATED SITUATIONS

How frequently do you turn to online content created by others such as yourself or online social communities where you can interact with others like yourself for the following health- and wellness-related situations? Please select one answer for each.

Base: Respondents who have used Internet resources to find or access health- and wellness-related information in the past 12 months and who have ever searched for them online (n=633)

Source: iCrossing



For those health searchers who do turn to social media content and communities, online forums and message boards such as Yahoo! and Google Groups and Groups@AOL are the most often used resource, at 38 percent, followed closely by Wikipedia, at 30 percent. Social networks, both general and health-specific, can be considered a secondary resource in these instances (used by 14 percent of respondents), while streaming or downloadable video and audio have yet to enter the mainstream. Likewise, live chat rooms have not seen widespread adoption for consumer health-related applications. In terms of the factors motivating health searchers to navigate to online social spaces, people seem particularly driven by a need for information about doctors, medical practices and care services, again demonstrating that the experiences of fellow consumers are a valuable resource when making personal health decisions.

CONCLUSION

Consumers rank pharmaceutical companies and television as the two least trusted sources for information about health-related issues and questions, and place them in the bottom tier in terms of sources that influence their medication choices. Yet, pharmaceutical companies continue to spend lavishly on television advertising, even as consumers' attention refocuses on the Internet and the Web becomes a progressively important tool for consumers to manage their personal health. The prognosis here is not good, and while the situation is not life-threatening for marketers, their efforts would be better served by matching resources to consumers' media consumption and usage habits.

Clearly, consumers are highly concerned about their health, as evidenced by the array of resources they utilize to get information and advice and the frequency with which they do so. By necessity, health and wellness will remain a multi-channel environment, because consumers will continue to seek advice from doctors and undergo procedures at hospitals and clinics. The key for every participant in the health value chain is to understand the journey consumers take in order to end up seeking care at a specific facility or from a particular physician or how they opt to take one medication over another. Close attention should be paid to the influence demographics have on health-related online activity, particularly where age and gender are concerned.

The results of this study suggest that online resources, particularly general search engines, healthcare portals and a range of social media, play a central role in steering consumers towards care and treatment options. To take full advantage of opportunities to connect with in-market health consumers, content must be available in and optimized for a range of formats, and ideally should comprise a truly interactive component that allows consumers to socialize. In order to maximize relevancy, content should be oriented around the health topics that most preoccupy consumers, such as symptoms, treatment, and conditions and wellness issues such as exercise, nutrition and weight loss.

At the same time, it is important to keep in mind that doctors and other medical professionals continue to play an important role in vetting the information that consumers retrieve from online research activity and other online social interactions. Regardless of the increasing move toward Internet-based self-care among consumers, the standing of physicians is likely to remain a privileged one for some time to come.

ENDNOTES

METHODOLOGY

This report presents the findings of a survey conducted among a sample of 1,084 adults comprising 513 men and 571 women 18 years of age and older. The online omnibus study is conducted twice a week among a demographically representative U.S. sample of 1,000 adults 18 years of age and older using the Greenfield Online panel. Interviewing for this survey was completed on December 3-4, 2007.

Completed interviews are weighted by four variables: age, sex, geographic region and race, to ensure reliable and accurate representation of the total U.S. population, 18 years of age and older. The raw data are weighted by a custom-designed program that automatically develops a weighting factor for each respondent. Each respondent is assigned a single weight derived from the relationship between the actual proportion of the population based on U.S. Census data with its specific combination of age, sex, geographic characteristics and race and the proportion in the sample. Tabular results show both weighted and unweighted bases.

Respondents for this survey were selected from among those who have volunteered to participate in online surveys and polls. The data have been weighted to reflect the demographic composition of the population 18 years of age and older. Because the sample is based on those who initially self-selected for participation, no estimates of sampling error can be calculated. All sample surveys and polls may be subject to multiple sources of error, including, but not limited to sampling error, coverage error, error associated with non-response, error associated with question wording and response options, and post-survey weighting and adjustments.

CITATION POLICY

The content and statistics contained in the body of this report may be used in publications and presentations provided there is attribution to: "iCrossing, a digital marketing company."

CONTACT

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ABOUT ICROSSING

iCrossing is a global digital marketing company that combines talent and technology to help world-class brands find and connect with their customers. The company blends best-in-class digital marketing services – including paid and natural search marketing, Web development, social media, research and analytics – to create integrated digital marketing programs that engage consumers and drive ROI. iCrossing clients include over 40 Fortune 500 companies and such recognized brands as The Coca-Cola Company, DuPont, Office Depot, Toyota and Travelocity. Headquartered in Scottsdale, Arizona, the company has 550 employees in 13 offices in the U.S. and Europe.

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