



Changing search behaviors in Health & Wellness

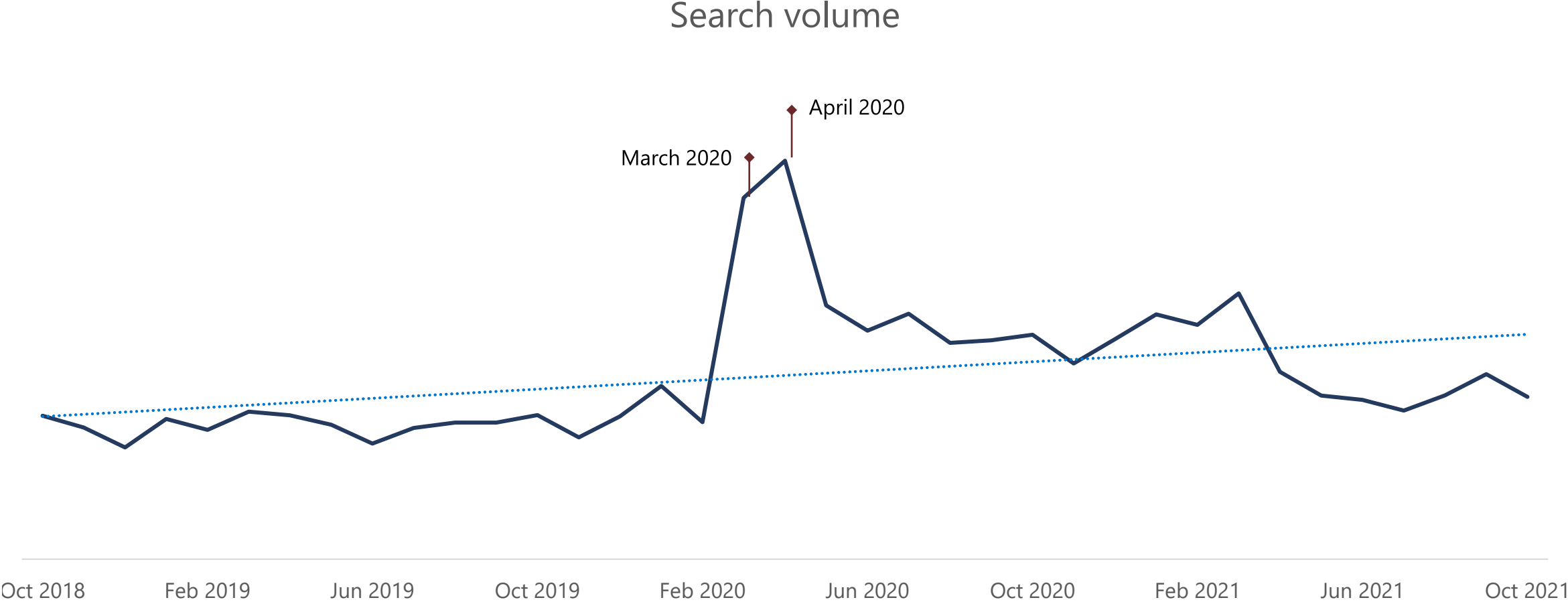
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Key findings

1. Coronavirus-related searches were the biggest trend in search history. Although search volume has dropped since its peak in April, it is evident that consumers **are increasingly relying on search as a source of health information.**
2. Not surprisingly, **conditions linked to coronavirus** (e.g., respiratory issues and mental health) or **discussed as potential side effects** to the vaccine **saw the greatest upward trend** in search volume.
3. **Specialist conditions** experienced the **greatest decrease in search volume**, likely driven by cancelled appointments and delayed screenings.
4. **Interest in online health solutions** was prevalent before the pandemic and **has since been magnified.**
5. Consumers are increasingly looking for ways to make prescription medication more affordable. Fewer users search for a medication name in conjunction with terms that point to affordability interest (e.g., "free", "deal", or "sale").

Search volume spiked in March and peaked in April of 2020

Relying on search as a source of health information continues to trend upwards



Microsoft Internal Search data, Oct 2018-October2021



Notable queries demonstrate interest in online health solutions

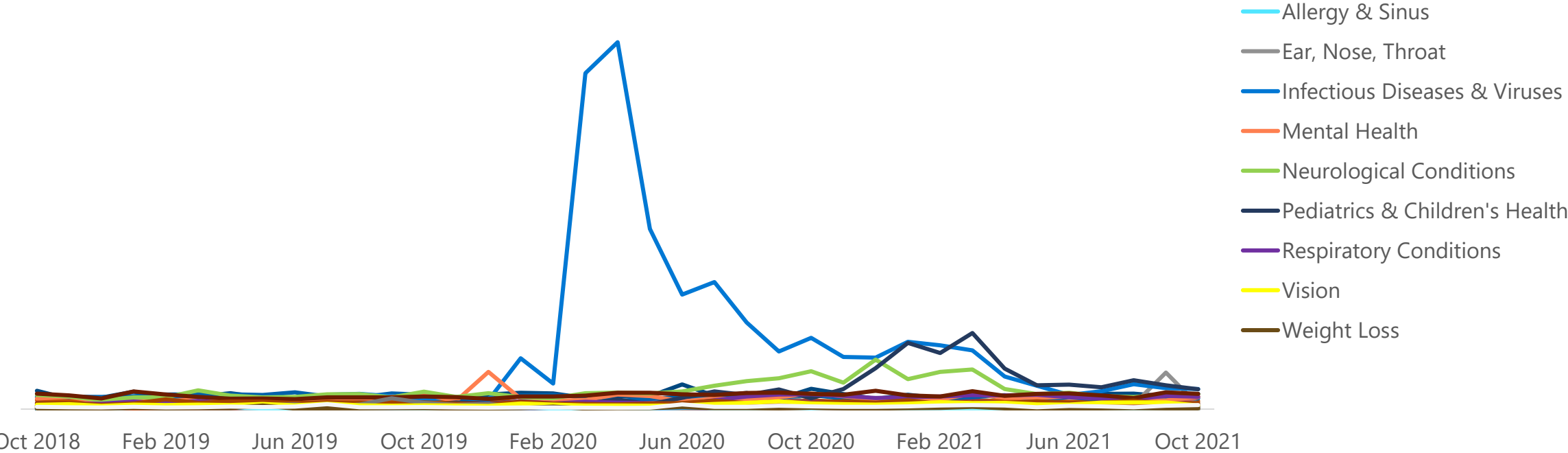
Top health queries year-over-year (based on how likely they are searched)

Consistent interest and relevance 2018-2021	Increasing interest and relevance in 2019	Increasing interest and relevance in 2020	Increasing interest and relevance in 2021
<ul style="list-style-type: none"> • Symptoms • Disease • Cancer • Definition • Blood pressure • Center • Diabetes • Health • Depression • CDC • Calculator • Alzheimer • Abdominal • Hearts 	<ul style="list-style-type: none"> • Online • Anemia • Measles • Children • Autism 	<ul style="list-style-type: none"> • Covid • Coronavirus • <i>[Location queries such as states and cities]</i> • <i>[Price/affordability terms]</i> 	<ul style="list-style-type: none"> • Vaccine • Vaccination • <i>[Pharmacy brand names]</i> • <i>[Pharmaceutical company names]</i>

Infectious diseases and viruses dominated search volume

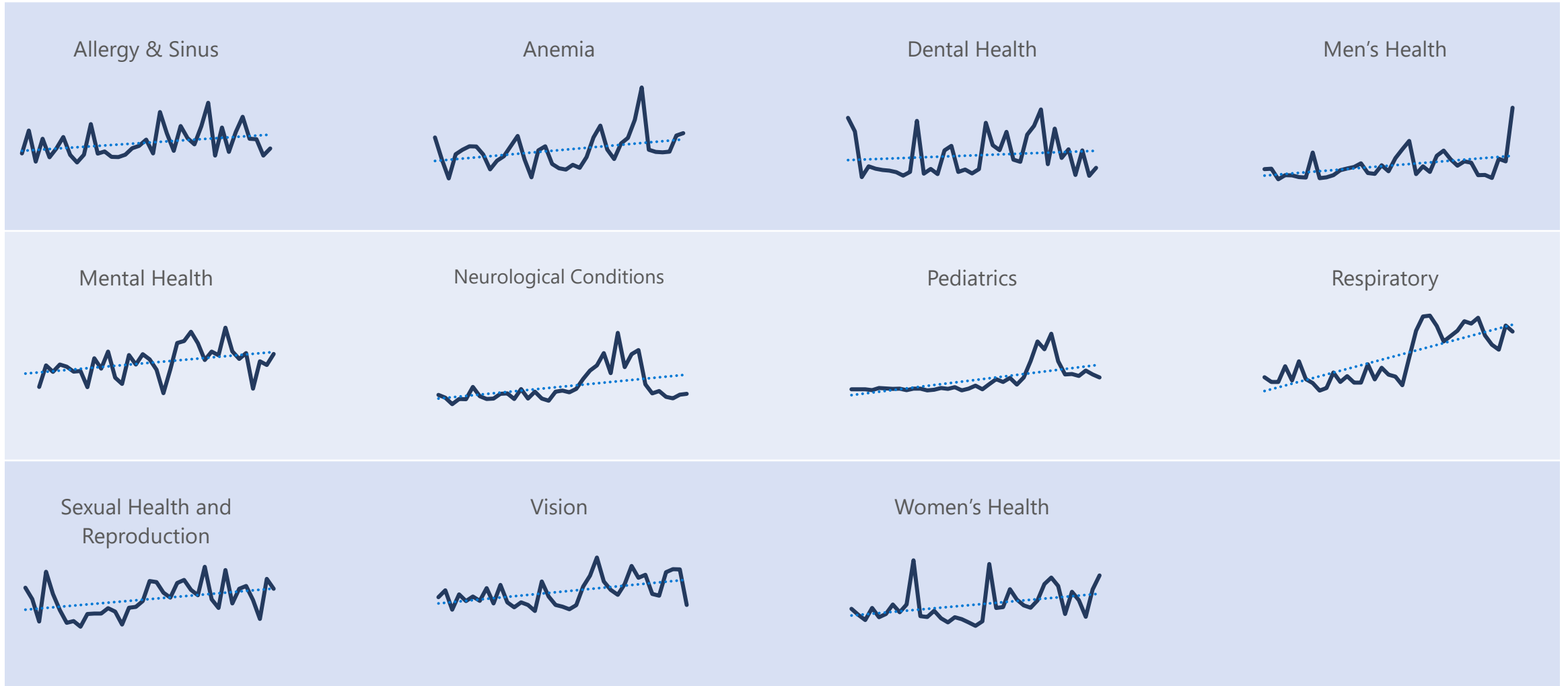
Coronavirus is the biggest trend in search history

Search volume (by condition)



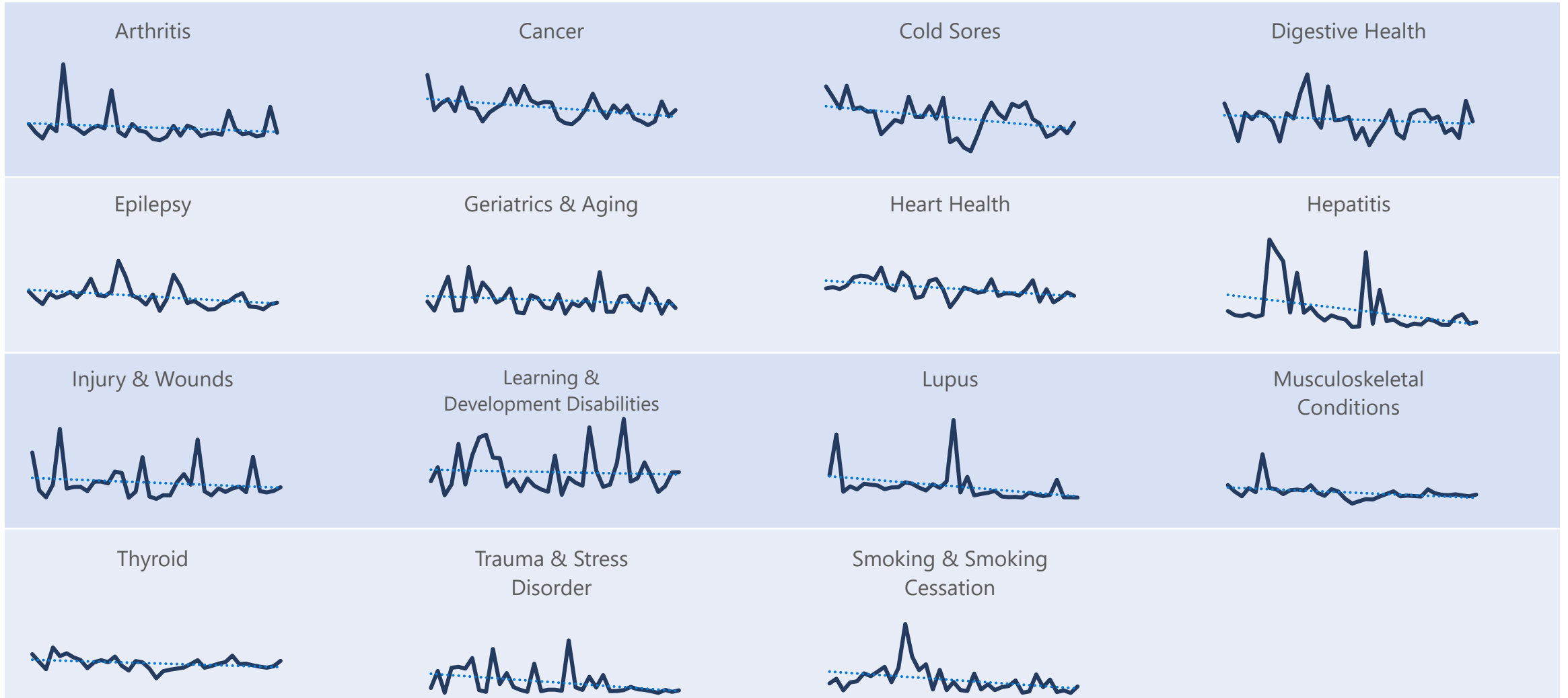
Conditions linked to coronavirus saw the greatest increase

Respiratory issues, mental health or potential vaccine side effects saw growth



Specialist conditions were more likely to experience a decrease

Lower search volume was likely driven by cancelled appointments and delayed screenings



Search volume for trends such as Alzheimer's and psoriasis decreased

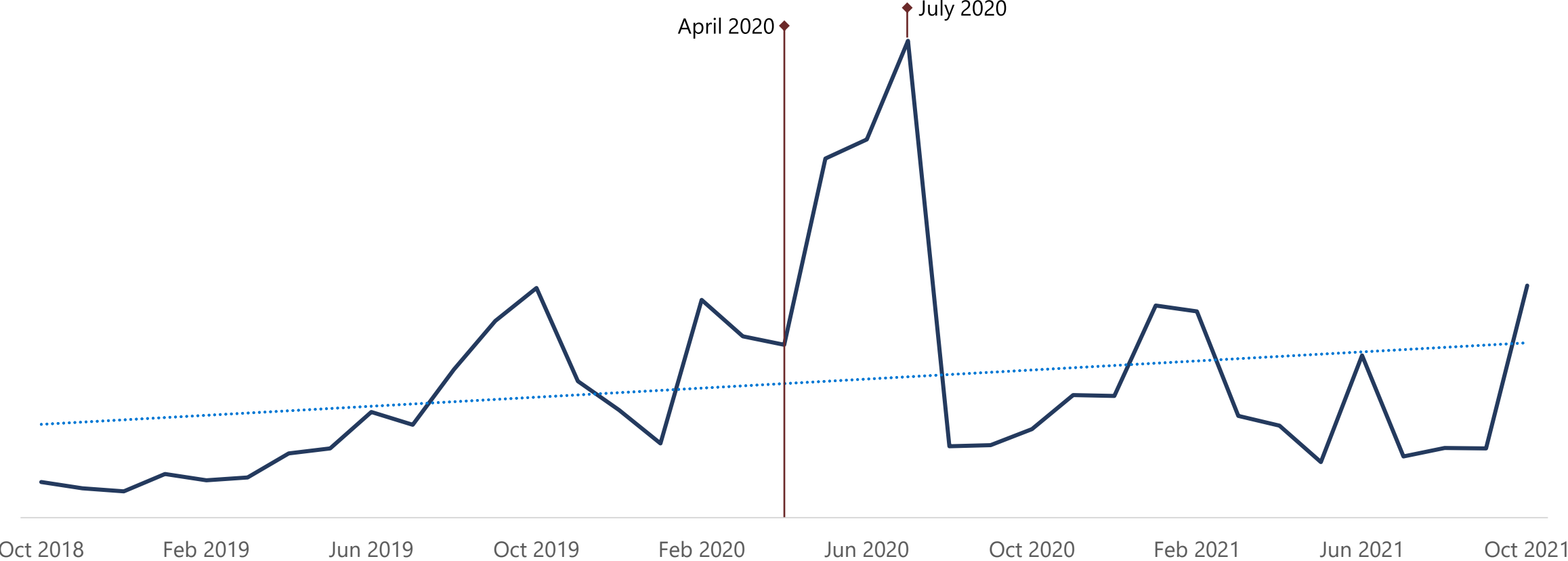
Specialist conditions are more likely to decrease, while migraines increased following rise in mental health issues

	Alzheimer's	Breast Cancer	Diabetes	Migraines	Psoriasis
Trending	down	down	on par	up	down
Trend pattern	Decreasing like other conditions that require a specialist doctor	In line with decreasing trend of overall cancer searches	On par when removing search volume related to published research	Follows rise in mental health issues including stress and anxiety	Decreasing like other conditions that require a specialist doctor

Searches for online health solutions were magnified by the pandemic

Searches peaked in July 2020, a few months after lockdown restrictions were imposed


Virtual health services key terms search volume



Microsoft Internal Search data, Oct 2018-October2021



Those who have bought medication online tend to be satisfied



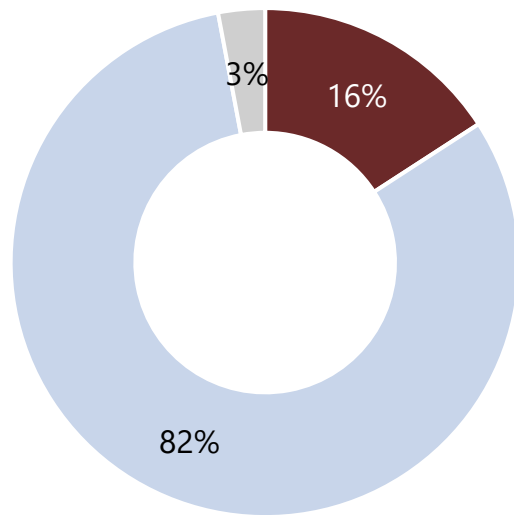
Americans who have used online services to purchase prescription medicine

- **Have purchased prescription medication online:** 35%
- **Report increasing their use of online pharmacies in 2020:** 16%
- **New online pharmacy users in 2020:** 31%
- **Plan to purchase medication online again in the future:** 72%
- **Top reasons for purchasing medication online:** convenience, cost
- **Demographics:** Skew younger, urban, well-educated, higher household income

Two-thirds of consumers blame pharmaceutical companies for rising costs

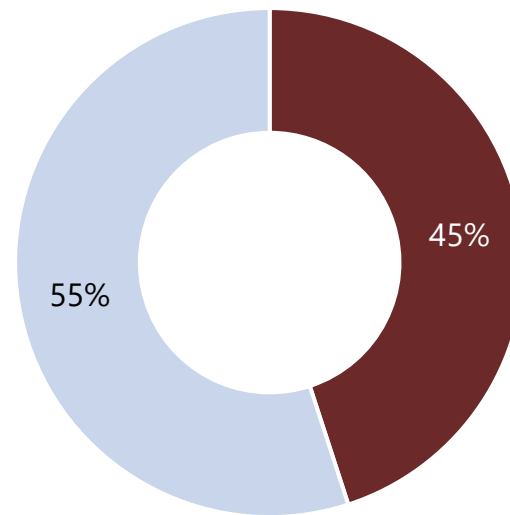
Consumers cite affordability issues as the top reason for not filling prescriptions

Did not visit doctor in the last year due to cost



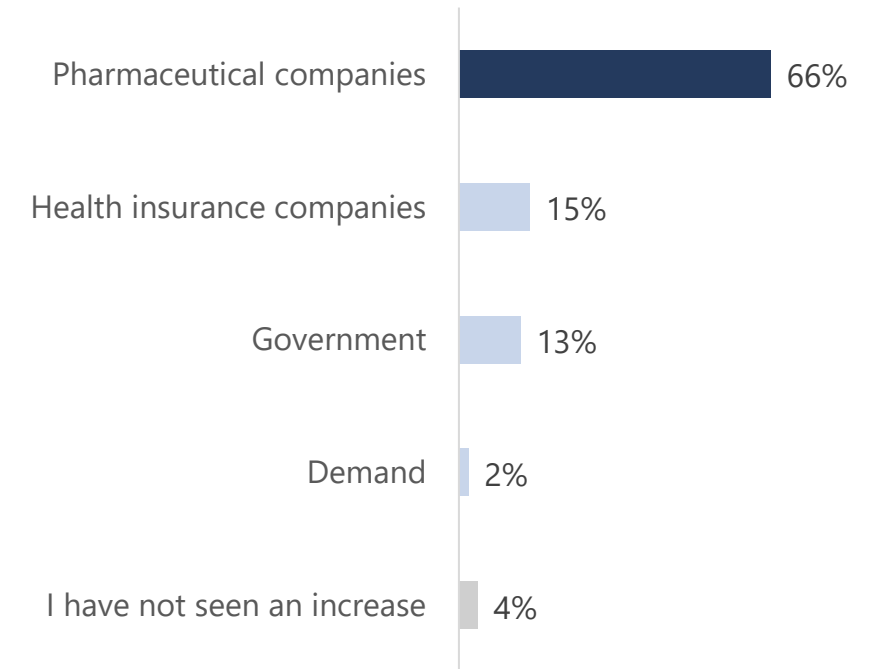
■ Yes ■ No ■ Not sure

Did not fill prescription due to cost



■ Yes ■ No

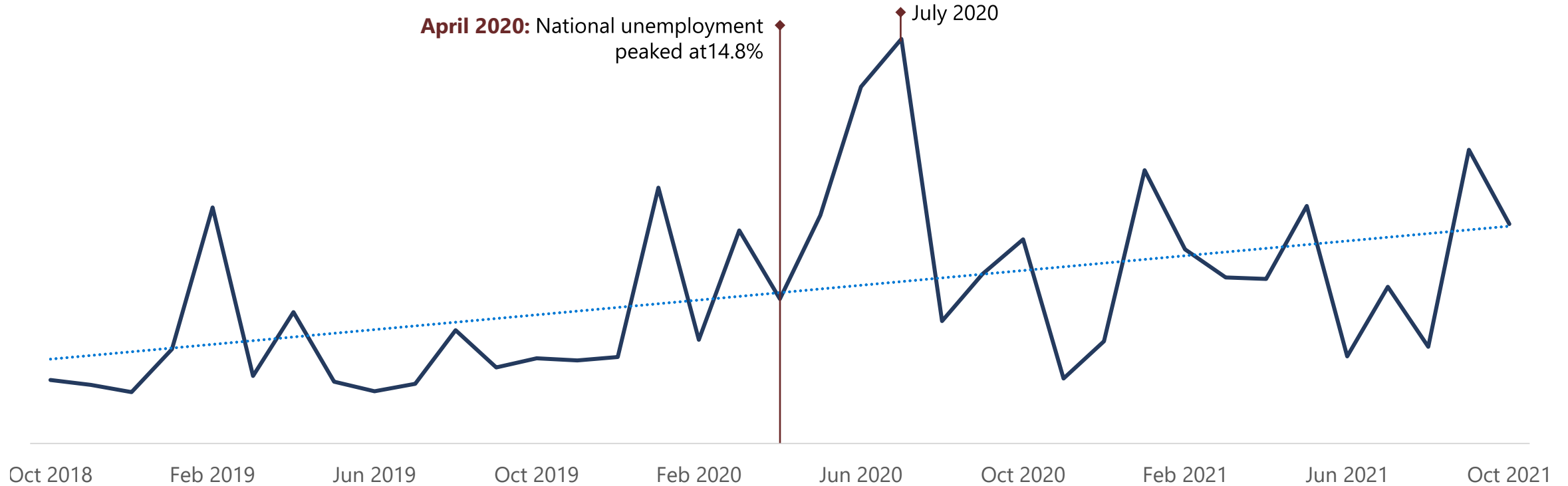
Most responsible for rising drug costs



Affordability-related searches continue to trend upward

Affordability-related searches peaked shortly after the national unemployment high

Affordability key terms search volume



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