



SEARCHING FOR ALLERGY RELIEF: How Marketers Can Help

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THE **RUNDOWN**

Allergies are a pervasive problem in the U.S., and search behavior across Google.com and YouTube reflects how allergy sufferers and caregivers turn to search for guidance and help. In the midst of Fall allergy season, marketers have tremendous opportunity to drive awareness for their remedies at these moments of education and self-diagnosis happening across symptoms and seasons.

Does it seem like allergy season keeps getting worse and worse every year? Are you surrounded by people sneezing and sniffing into the summer months when allergy season is supposed to be over? You're not imagining it, and you're not alone. A new study from the Centers for Disease Control and Prevention (CDC) shows that allergies are increasing in the U.S.¹ The CDC survey suggests that about one in 20 U.S. children have food allergies, a 50% increase from the late 1990s. For eczema and other skin allergies, it's one in 8 children, an increase of 69% over that same time period.² In fact, the allergy category is the most chronic medical condition affecting children and it is the fifth leading chronic disease in the U.S. across all age groups.³ It's no surprise then that the allergy drugs market is set to exceed \$14.7B by 2015.⁴

We're always interested to understand how search patterns reflect the broader consumer realities around us. In the case of allergies, we wanted to take a closer look at whether the increase in allergies in the U.S. has been reflected in search query volumes, and how search trends in the category might offer actionable insights for marketers trying to reach allergy sufferers.

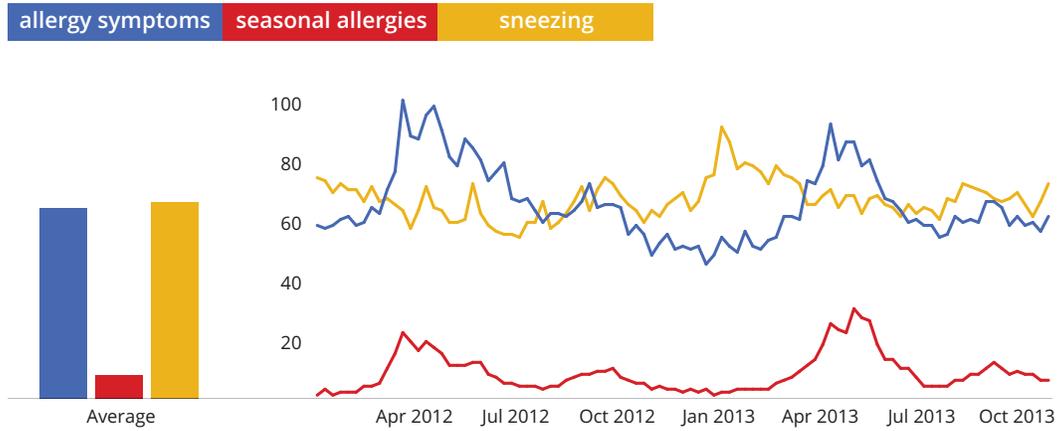
Are allergy sufferers searching online?

The answer is an astounding yes. Allergies are a huge and rapidly growing category with over 100 million searches expected in 2013, growing at 20% year-over-year. There are over 30 million searches expected in Fall 2013 alone and a substantial portion will be done on a mobile device.⁵ So not only are millions of allergy sufferers searching, they're searching year round, on multiple devices, along all stages of their patient journey. As reflexively as people grab a tissue when they sneeze, they turn to search when they have questions.

Speak to consumers searching for symptoms, right from the start

Allergy-related searches include more than just queries for branded medications. In fact, most Americans today are searching for allergies in broad terms before honing on a specific type of allergy or brand. More than two-thirds of allergy searches are 'symptom' related; People are searching for 'watery eyes,' 'itchy throat' and other terms that indicate self and/or pre-diagnosis research. And these 'symptom' searches are growing 35% YoY, outpacing general category growth by 15%. As seen below, 'allergy symptoms' and more specific descriptions of symptoms (i.e. 'sneezing') are generating more search volume than general searches such as 'seasonal allergies'.⁶

Indexed Search Query Volume, United States



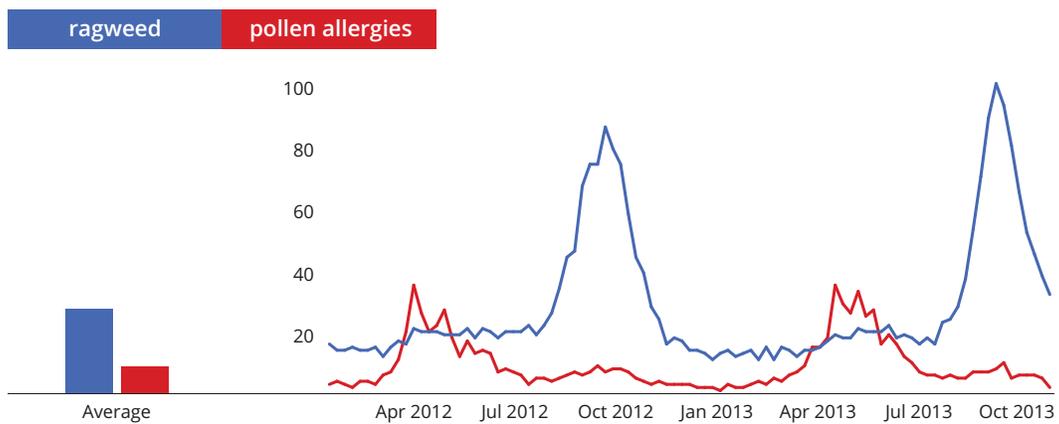
Not all allergies are created equal

The allergies category includes a range of conditions, from seasonal, to food, to pet allergies. By diving deeper into subcategories like these, we can surface additional insights about consumer behavior and attitudes — and discover actionable implications for the brands hoping to reach them.

For every sniffing search, there is a season

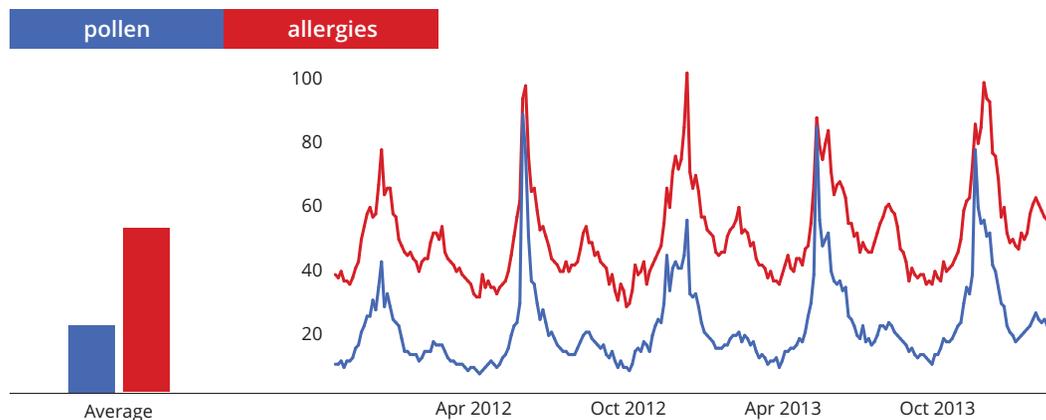
Fall and Spring allergy seasons are different. For example, an increase in 'ragweed' searches indicates the start of Fall, while 'pollen' searches spike before Spring.

Indexed Search Query Volume, United States



This pattern is consistent year to year, so monitoring these key terms can provide insight into when the seasonal uptick is upon us. Brand marketers should be ready to assist and inform allergy searchers whenever they're looking for information, but should be prepared to focus their investment during these times of heightened interest.

Indexed Search Query Volume, United States

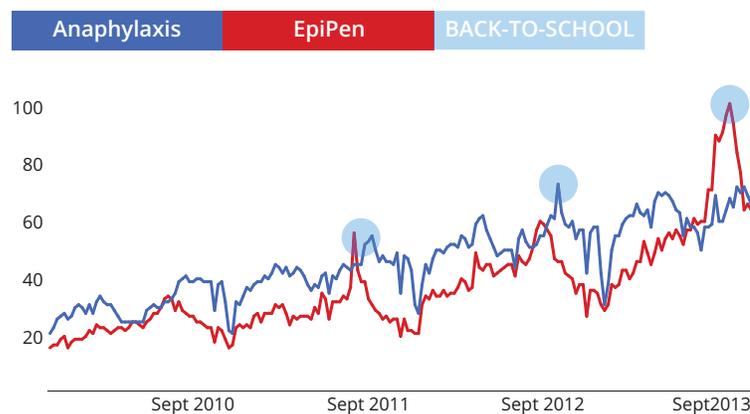


Back-to-school brings allergies front of mind

We know that allergies come in all shapes and sizes; they're specific to each individual. While we're seeing greater awareness and research for all types of allergies in 2013, we're seeing especially intense search activity for anaphylaxis and life-threatening allergies. We observed 2x the search activity for 'EpiPen' and severe allergies to 'sting' this season.

While 'anaphylaxis' searches have increased by 15% this year, our major observation is that this research intensifies around the back-to-school weeks. We see a spike of 20-30% in 'anaphylaxis' and 'EpiPen' searches in August through September.⁷

Indexed Search Query Volume, United States

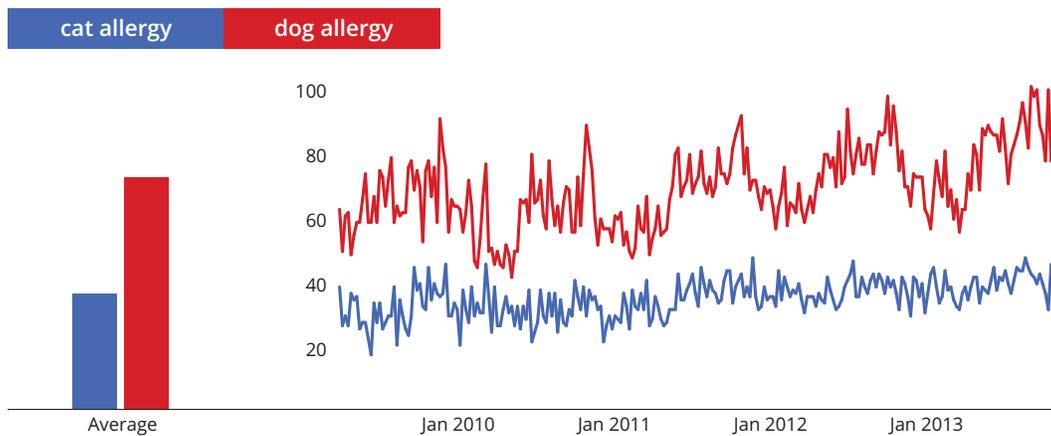


Brand marketers should note that the back-to-school season is a time of new diagnoses, brand choice, and adherence. Parents are looking for programs, guidance, and information to manage anaphylaxis without being in the classroom. Informative content from a brand can give them greater peace of mind and turn them into loyal customers.

Pet allergies run wild all year round

Pet allergies remain relatively steady throughout the year, revealing little to no seasonality trending. The category is showing strong growth at over 35% YoY, outpacing the general allergy category by over 15%. Since pet allergies don't experience the same seasonal spikes that we see in traditional seasonal allergy searches, brands should focus on running pet-specific messages year round, capturing consumer intent at all times.⁸

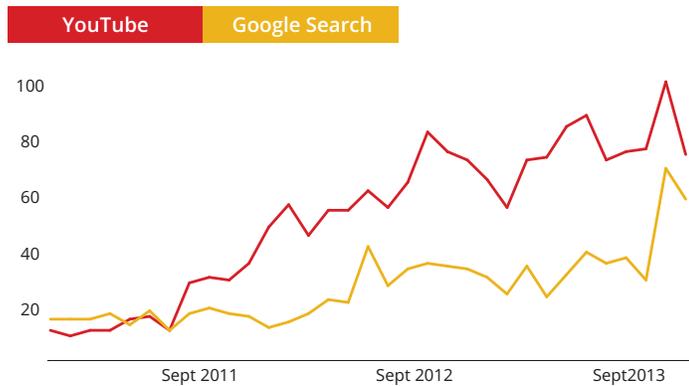
Indexed Search Query Volume, United States



Searching for guidance through video

Sometimes words aren't enough. Questions around life-saving skills — emergency injections, the heimlich maneuver, etc. — often call for a visual demonstration. So people are turning to videos, via Search and YouTube, that give guidance and instruction for dealing with these medical situations. We're seeing more than 76% of 'how to inject' EpiPen/Epinephrine searches happening on YouTube everyday.

Indexed Search Query Volume, United States



The implication is that marketers have a huge opportunity to connect with these searchers, aligning their brands with the critical information and instruction they seek. More than half a million YouTube searches for “how to use an epipen” reveals nearly 3000 user-uploaded videos, yet zero brand presence. Brands can, and should, join the conversation — if not lead it.

The marketing opportunity

Allergies are a widespread and growing health problem in the U.S. and there are no signs pointing to a decrease, or even to stabilization, of this chronic condition any time soon. The lives of millions of Americans are affected everyday. Patients, caregivers, and healthcare providers alike increasingly use search as their digital gateway to find information on allergies. A deeper look into search query volume offers great behavioral insights into our target audience and leads to the following marketing implications:

- Broad category or symptom-related searches are just as important to address as searches for brand names.
- Brands should prepare to optimize their messaging to address the Fall and Spring allergy trends.
- Back-to-school seasonality search trends present a special marketing opportunity for life-threatening allergies.
- Pet allergy searches merit steady year-round marketing messages.
- YouTube presents a unique opportunity to educate consumers with “how-to” content.

The common theme here is that marketers have the opportunity to be more present--

ready to assist and inform the allergy-afflicted and allergy-curious. Despite the increase in search demand from consumers, nearly 40% of all food allergy searches go unanswered with advertising, and during off-season, 20% of all seasonal allergy searches go unanswered. Marketers should capitalize on the growing (and vast) consumer searching, responding with an 'always-there' approach to drive awareness for their brands or allergy solutions even when the brand isn't directly searched for. They should also align marketing budgets with key brand or seasonal events and "heavy-up" to meet the demands of increased search volume. Finally, they should pursue a content strategy that addresses allergy-related topics and common questions, directing users to videos, tips, etc. that can simultaneously help the searcher and establish the brand as a credible solution.

Search is increasingly the allergy sufferer's diagnostic tool. Marketers should stand ready to aid the process and ensure their brands are present and top-of-mind. Each sniffer, sneezer and scratcher will welcome a relevant message and informative content to help.



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Sources

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