

WHITE PAPER | 2020

Inside the Mind of Undiagnosed Symptomatic Patients



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A photograph of a woman with short, wavy blonde hair, wearing a light blue cardigan over a white top and a blue and white patterned scarf. She is sitting on a black medical examination table in a clinical setting, looking out a window to her right. In the background, there is a white wall with a chart and a scale.

E	D	C	Z	P	6
F	E	L	O	P	7
S	P	F	O	R	8
A	S	T	R	O	9
A	R	E	L	E	10
N	O	T	H	I	11

EXECUTIVE SUMMARY

How are undiagnosed symptomatic patients different from diagnosed patients? Are there differences in how people think, feel and behave, before versus after being diagnosed? And should we be reaching them differently?

While some brands distinguish their messaging approaches for each group, most marketing outreach plans bundle both audiences, relying on the same tactics – keywords, contextual alignment, audience profiles – in the name of efficiency.

We wanted to know:

Are we missing an opportunity?



OVERVIEW

Healthline fielded a survey to get inside the mind of the undiagnosed symptomatic patient (*referred to simply as ‘symptomatic’ in other parts of the report*), and compare it to people diagnosed with conditions, as it relates to their health mindset, motivations and actions.

Findings are based on a national sample of 2,024 American adults (18+ years), recruited from Survey Writer International. We fielded a 15-minute online survey that was executed between June 3 - June 17, 2019.

We found big differences across the segments, some expected, and some rather surprising. Data in this report focuses on the findings of **308 people undiagnosed with symptoms and 1,105 people diagnosed with medical conditions.**

All respondents are third-party panelists, not Healthline Media consumers.



DEMOGRAPHICS

AGE

SYMPTOMATIC

DIAGNOSED

18-34	48%	18%
35-54	34%	28%
55+	18%	54%

GENDER IDENTITY

Female	56%	62%
Male	43%	38%

GEOGRAPHIC REGION

Northeast	19%	23%
Southeast	29%	27%
Midwest	23%	23%
Southwest	12%	9%
West	17%	18%

HEALTH CONDITION PROFILE

Top 10 conditions

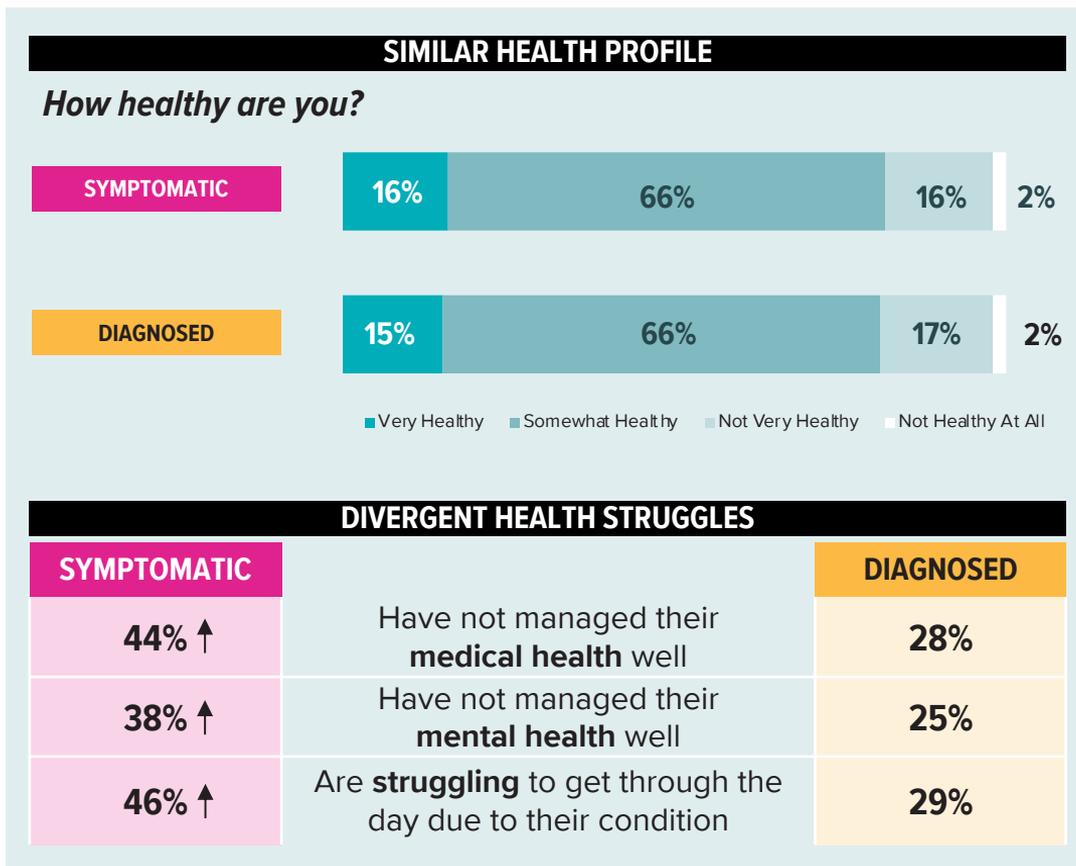
SYMPTOMATIC

DIAGNOSED

Anxiety	25%	High Cholesterol	29%
Allergies	23%	Allergies	18%
Back Pain	22%	Anxiety	17%
Depression	21%	Type 2 Diabetes	17%
Acne	20%	Asthma	16%
High Cholesterol	18%	Depression	16%
ADHD	13%	Osteoarthritis	14%
Chronic Pain	12%	Psoriasis	14%
Sleep Disorders	11%	Back Pain	13%
Asthma	8%	Psoriatic Arthritis	10%

Real Struggles

Undiagnosed symptomatic patients haven't received a diagnosis yet, and are still searching for answers and resolution. It's not surprising then, that across patients in these two groups (with the same health profile), undiagnosed symptomatic patients are more likely to feel like they've inadequately managed their health, and to report struggling to get through the day.



↑ Indicates a statistically significant difference at a 90% confidence level between respondent groups

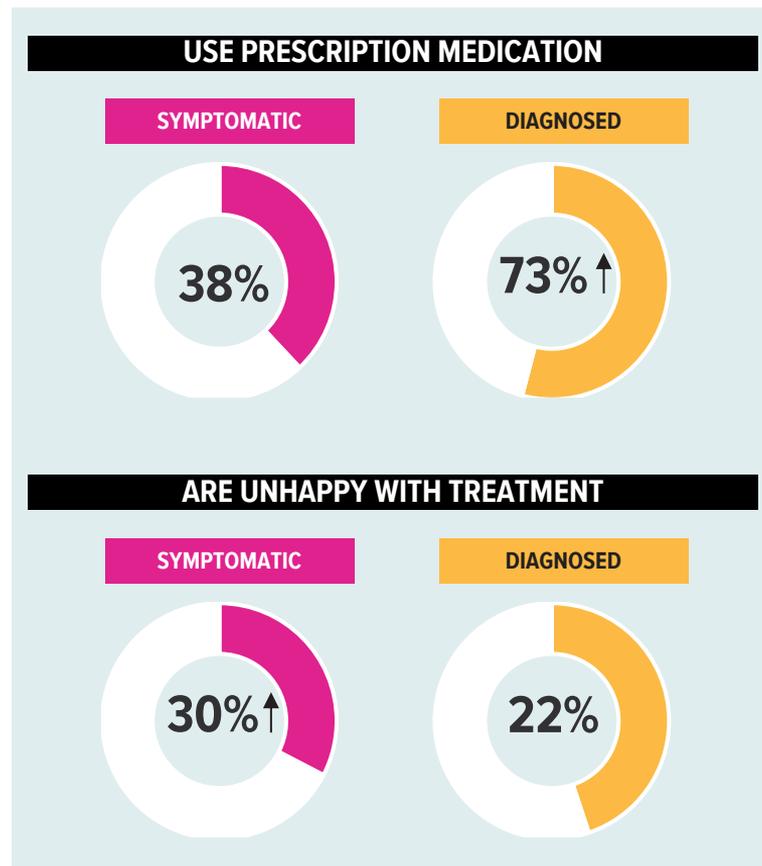
S7. In general, how healthy would you say you are?
 A3. And how well do you feel you have managed each of these areas of your health?
 D11-R2: Select your level of agreement with each statement below. "I struggle to get through the day due to my condition/symptoms."

Rx Naive

As undiagnosed symptomatic patients don't have a diagnosis, one would expect they are not being treated with prescription medications. Only 38% of this segment are treating with prescription medications, vs. 73% of diagnosed patients. Undiagnosed symptomatic patients are instead also turning to over-the-counter medications, behavioral approaches like exercise, supplementary vitamins and herbs, and even meditation and prayer.

In addition, we found that undiagnosed symptomatic patients believe that their treatment is severely lacking. 30% of undiagnosed symptomatic patients report being unhappy with their treatment; that's 36% higher than diagnosed patients.

↑ Indicates a statistically significant difference at a 90% confidence level between respondent groups



Lean into Alternative Approaches

49% of undiagnosed symptomatic patients turn to alternative approaches as their first line of support (vs. 27% of diagnosed patients).

Not only are they using these approaches regularly, but there is a strong desire to learn more. Undiagnosed symptomatic patients want more information about these alternative options compared to their diagnosed counterparts.

↑ Indicates a statistically significant difference at a 90% confidence level between respondent groups

49% ↑

Start with **alternative treatment options** before taking prescription or over-the-counter medications



TOP INFORMATION TOPICS THEY WANT

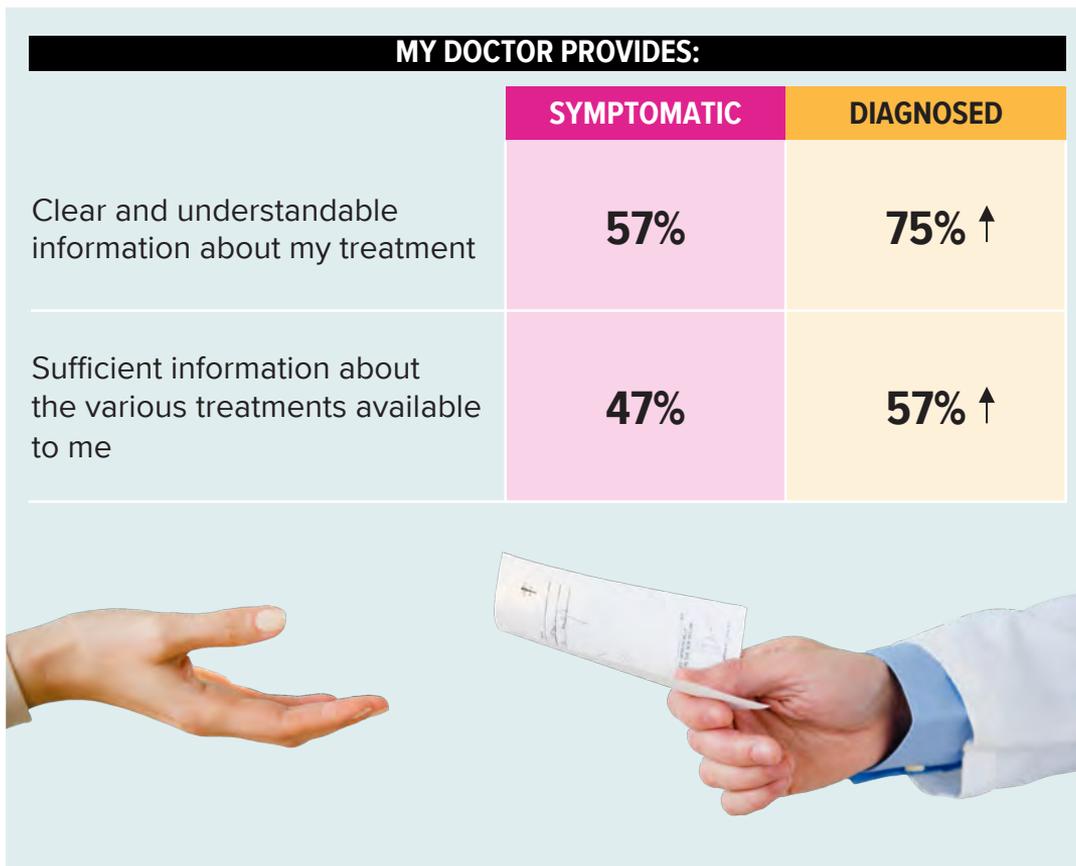
Herbal remedies	55%	Vitamins	51%
Homeopathy	53%	Massage therapy	49%
Acupuncture	51%	Dietary supplements	47%
Biofeedback therapy	51%	Medical marijuana	47%
Diet and nutrition	51%	Exercise	39%

Feel Let Down by Health Professionals

Grappling, flailing, and desperate for answers, those undiagnosed with symptoms have a lot to say about dissonance with their doctors.

60% have had healthcare professionals who treat them like a number, not a person (vs. 47% of diagnosed patients), and 63% wish their healthcare professionals understood their life, beyond their condition, better (vs. 50% of diagnosed patients). This struggle with doctor relationships continues into their role in providing treatment information.

↑ Indicates a statistically significant difference at a 90% confidence level between respondent groups



Committed, But Not Confident

In the absence of support and information from their doctor, undiagnosed symptomatic patients are stepping up and taking the initiative to self-educate. However, their experience is far from positive, as they still struggle to navigate conflicting health information on their own. It's not surprising, then, that almost half of all people undiagnosed with symptoms we surveyed expressed a desire for clarity and objective credibility in the online health information they seek.

↑ Indicates a statistically significant difference at a 90% confidence level between respondent groups

65%

supplement the information from their doctor with **their own research**

BUT 59%

worry that there's so much **conflicting health information** that it's hard to know whom or what to trust

AND 42% ↑

(that's 60% more than diagnosed patients) say they **need a coach to help navigate** their health journey



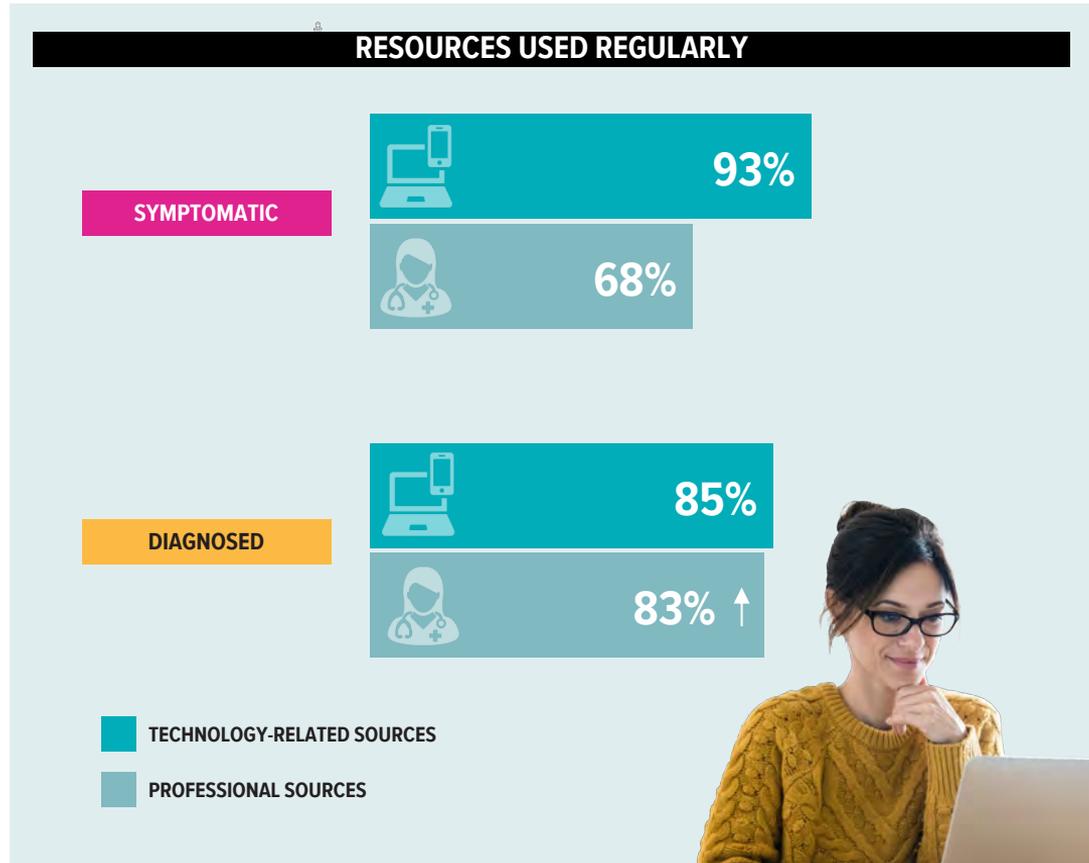
Turning to Tech

As undiagnosed symptomatic patients supplement the support they are getting from their healthcare professionals, they are more likely to turn to technology-related sources over professional sources for health and wellness information. Diagnosed patients, on the other hand, flush in their productive relationships with their doctors, use technology and professional sources almost equally.

Tech sources include: *Internet searches, online health sites, YouTube videos, Fitness trackers, online communities, online medical associations, social media*

Professional sources include: *Doctor or specialist, pharmacist, nurse, physician assistant*

↑ Indicates a statistically significant difference at a 90% confidence level between respondent groups



Different Strokes for Different Patients

Both undiagnosed symptomatic and diagnosed patients search for information about their symptoms or condition, ways to manage their illness or condition, and about their health insurance.

Beyond that, however, are some interesting differences. Diagnosed patients over-index in prescription medication searches vs. people undiagnosed with symptoms. Undiagnosed symptomatic patients are more active than diagnosed patients in searching for alternative approaches, information about their mental health and analogous patient stories.

UNDIAGNOSED SYMPTOMATIC PATIENTS

More likely than diagnosed patients to have searched for:

	SYMPTOMATIC
Fitness and exercise	50%
Healthy eating and nutrition	48%
Over-the-counter medications	38%
Mental health	35%
Complementary treatment options	25%
Patient stories	19%

DIAGNOSED PATIENTS

More likely than symptomatic patients to have searched for:

	DIAGNOSED
Prescription medications	50%

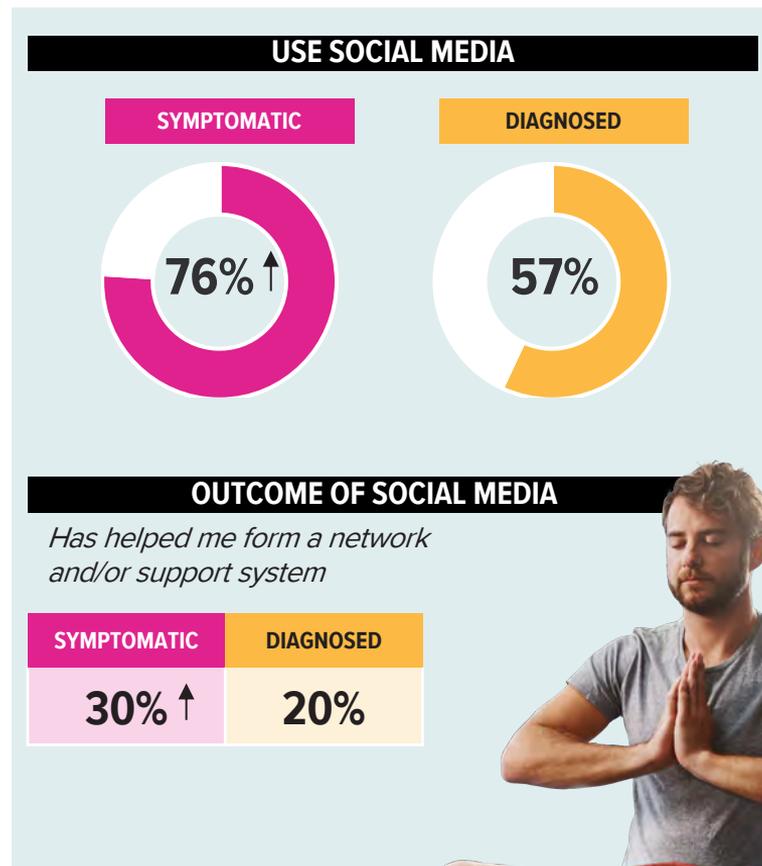
Compassion and Community

While undiagnosed symptomatic patients are clearly in overt need of practical guidance through their health management journey, they also would benefit from emotional support, kindness and compassion.

Undiagnosed symptomatic patients are over twice more likely than diagnosed patients to be attracted to content that uses an empathetic and warm tone when visiting websites for health and wellness information.

Likewise, they are 50% more likely than diagnosed patients to use social media to form networks and support systems comprised of other people like them, with similar experiences.

↑ Indicates a statistically significant difference at a 90% confidence level between respondent groups



B4: Thinking about the different websites you visit for health-related information, which of the following would you say would help you view that information as more accurate?

C1: Which, if any, of the following social media or community platforms have you used in the past year to help support and manage your health.

C2: For which, if any, of the following reasons have you used social media or online communities to help support and manage your health?

ACTION POINTS

Undiagnosed symptomatic patients are not getting relief from the modalities they are using today, and present a fertile audience for prescription pharmaceutical products.

But to effectively communicate with people undiagnosed with symptoms, we need to acknowledge that they have deep and varied needs, both practical and emotional, as they struggle to balance self-care while starting to pursue medical approaches.



5 KEY TAKEAWAYS FOR PHARMACEUTICAL MARKETERS

- 1** Engage mindfully with undiagnosed symptomatic patients. They're activated and aspirational.
- 2** They've been let down by the healthcare system. You have an opportunity to fix that.
- 3** Speak to both their head and their heart.
- 4** Expand your aperture to align with their varied health interests.
- 5** Help them connect with others like themselves, by accessing the power of networks.



ABOUT HEALTHLINE MEDIA

As the largest health information property in the U.S., we inspire 90 million people each month to take control of their health and well-being. We're committed to providing every individual with clear, credible, evidence-based health and wellness information that's distinguished by its compassion for the human experience.

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