

Voice of the consumer with a skin issue

FDA Skin Lesion Analyzer Meeting
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Skin diseases are an enormous global burden and every day millions of people turn to Google to research their skin concerns



2 billion people affected with skin disease

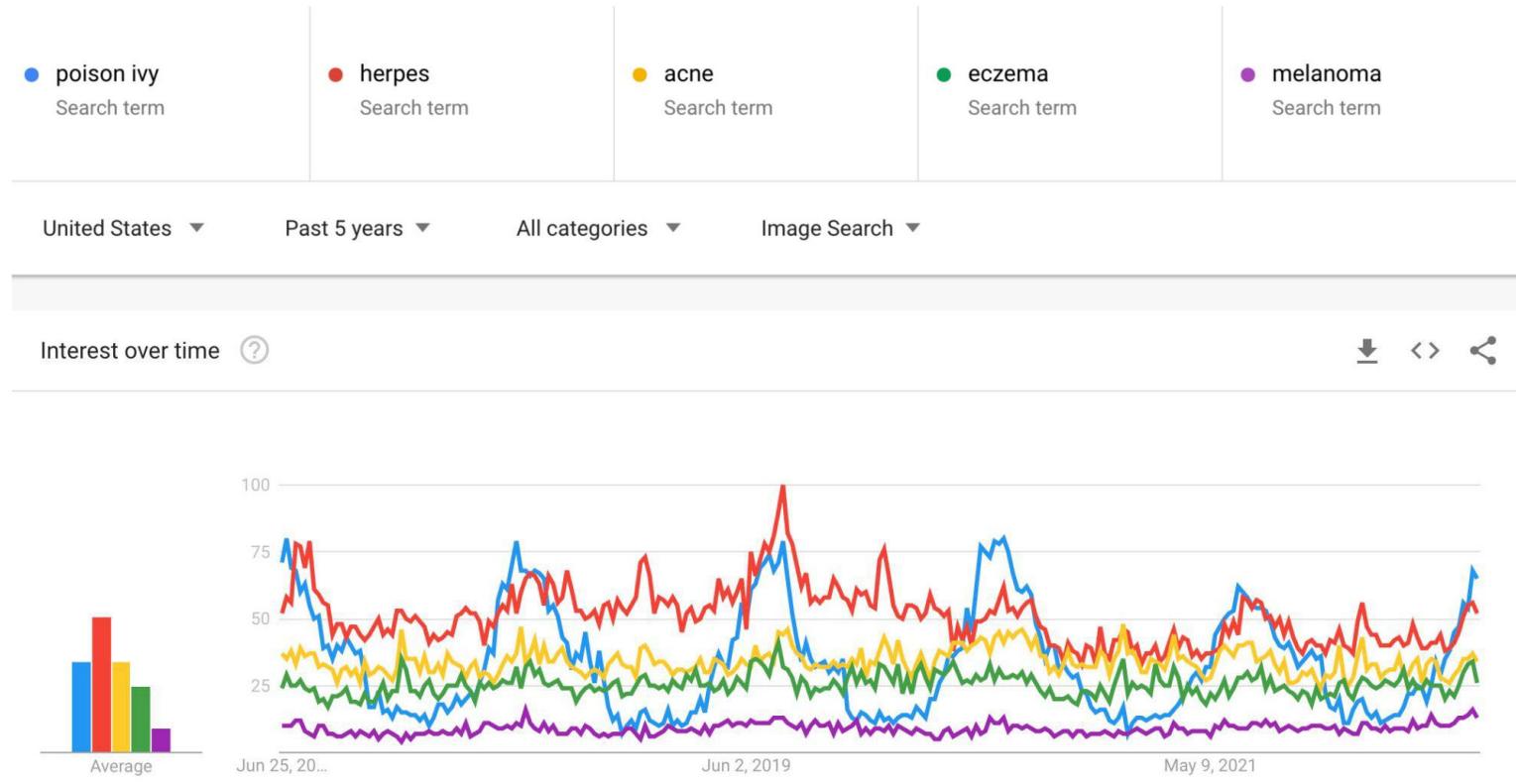


Half the world's population faces a critical shortage of dermatologists



10 billion annual skin condition queries on Search

What kind of conditions are consumers searching for?



Aggregated trends from trends.google.com (accessed June 22, 2022)

But describing what you have is really challenging!



Consumers **spend hours** researching their issues on the internet and talking to strangers on forums.



Consumers **arrive at a relevant condition only 13% of the time.**

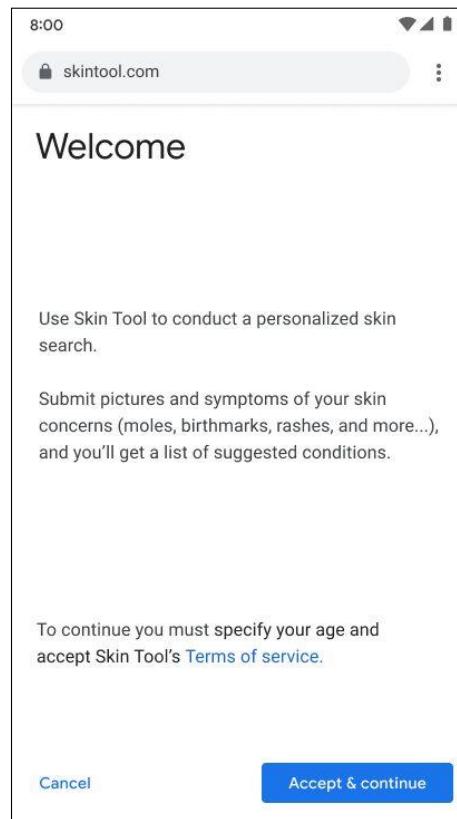


“I have a plant identification app. A skin app like that would be great. It would be **so much more convenient than googling.**”

- Female participant (25 - 45yo)

What do consumers want in a tool that helps with their search?

Asked consumers to imagine (unbranded) “**Skin Tool**” that will help conduct a **personalized skin search**



Survey of 2541 Google Search users who conducted a search for a skin issue in the past 12 months, with a mix of:

- Self-identified skin types
- Race / ethnicities
- Gender identification
- Self-reported skin type
- Health literacy / status
- Education
- Income
- Age

Income	Percent
Less than \$20,000	19%
\$20,000 to \$34,999	21%
\$35,000 to \$49,999	15%
\$50,000 to \$74,999	18%
\$75,000 to \$99,999	12%
\$100,000 to \$144,999	10%
\$145,000 or more	5%

Race / Ethnicity	Percent
White	44%
Black	28%
Hispanic	17%
Asian	10%
Multi-racial	4%
Native American	1%
Middle Eastern	0%
Prefer Not to Say	6%

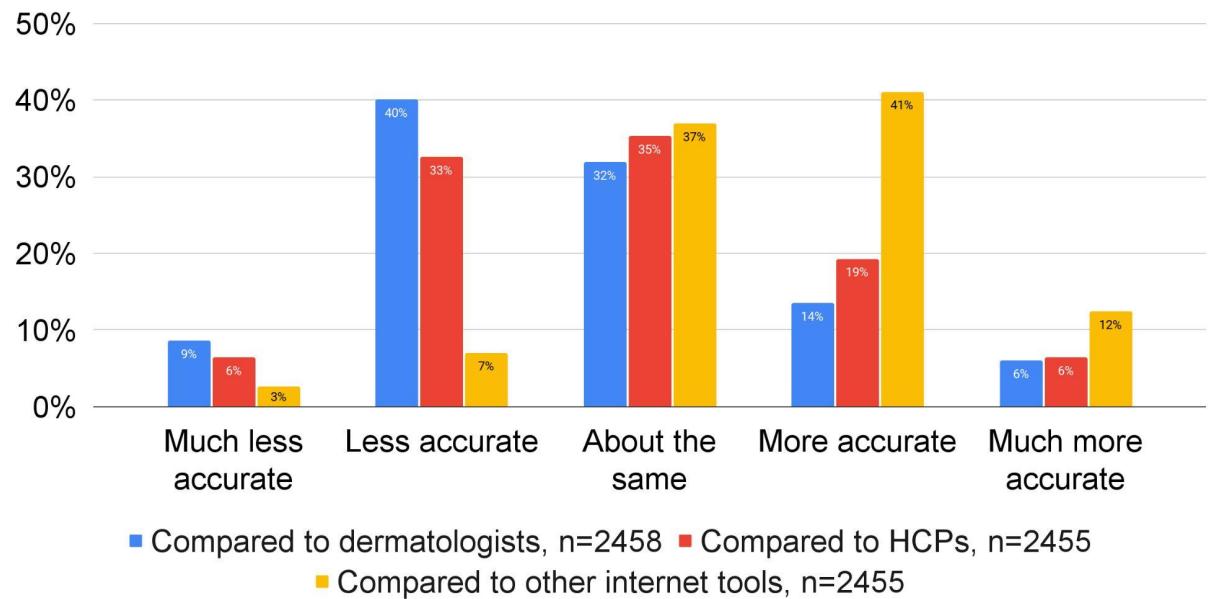
Education	Percent
Up to High School	3%
High School / GED	24%
Some College/Assoc Deg	38%
Bachelor's Degree	24%
Master Degree	9%
Doctorate/Prof Deg	2%

Age	Percent
18-24	26%
25-34	28%
35-44	23%
45-54	13%
55-64	10%
65+	1%

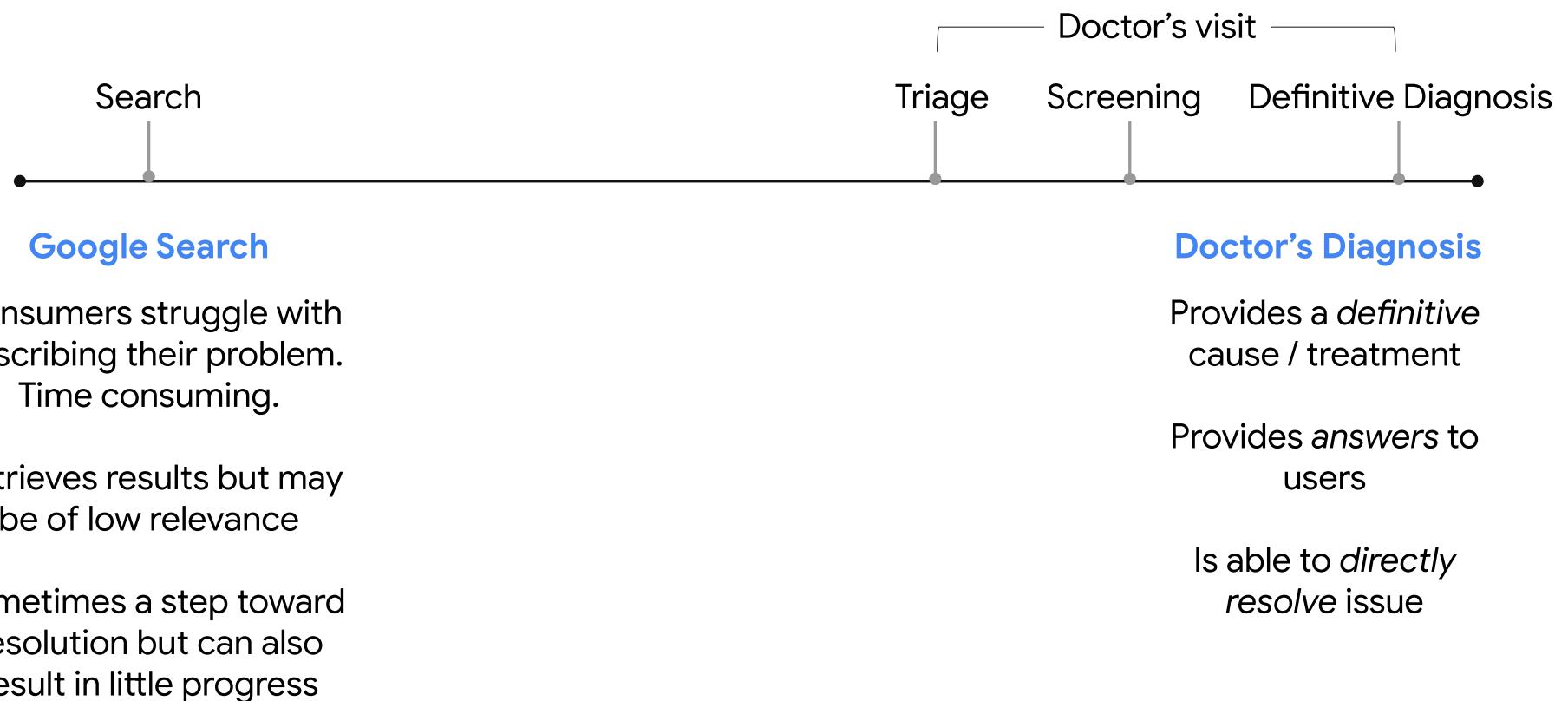
Consumers want a stepping stone between a Search & a doctor's visit

On average, participants expect the tool will be more accurate than other internet tools but less accurate than dermatologists and healthcare providers.

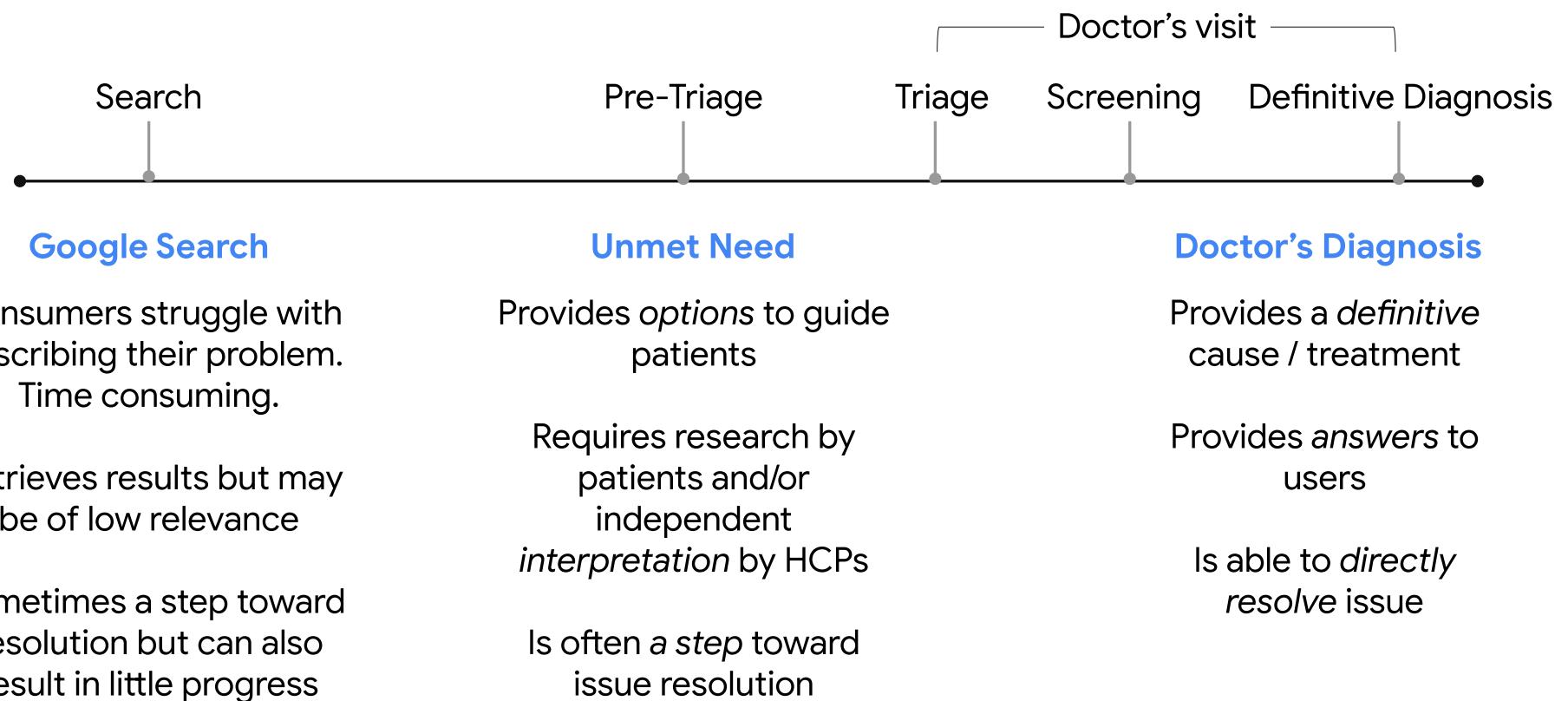
How accurate do you expect this tool to be compared to dermatologists, HCPs, other tools?



Consumers want a stepping stone between a Search & a doctor's visit



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Takeaways

Many unmet needs for consumers experiencing skin issues

A big opportunity to increase **accessibility & relevance** of health journeys for consumers

Consumers expect a self-help tool that they can rely on for non-serious conditions so they can decide when to seek medical attention