

The Future of Search in Healthcare

Navigating Fragmentation and GenAI

August 2025

The New Search Reality

The search landscape in healthcare is rapidly evolving. Traditional engines like Google and Bing still drive meaningful volume, but consumer behaviors are fragmented across platforms, with social media, influencer networks, and generative AI reshaping where and how patients and HCPs seek health information.

For brands, this shift represents both a challenge and an opportunity. To stay relevant, healthcare marketers must embrace a broader definition of search, adapt to zero-click experiences powered by GenAI, and rethink how content shows up across increasingly nonlinear, AI-influenced journeys.

Search is not a channel and should no longer be thought of as such. It is a behavior and its expanding nature means a rethinking of how we capitalize on intent in the healthcare space.

Evolving Trends in Search Behavior

Technology enables a more diverse search landscape with legacy search staying strong.

The Health Search Space is Fragmented in Multiple Ways

Traditional Search is even more fragmented in Healthcare

The search ecosystem is further fragmented for healthcare, as a Pharma brand or company will have multiple digital properties focused on different audiences or different initiatives. There are also instances where multiple drugs in a business portfolio treat the same condition and therefore are showing for similar queries.

This scenario presents a need for distinct strategies, messaging, and measurements of success. SSCG Media Group's health focused SEM teams know how to navigate the fragmentation to develop and execute holistic SEM strategies that cut down on waste, cannibalization, and lead to better site engagement for each brand's audience and initiative.

Search has evolved into a dynamic digital ecosystem



Presently Traditional Search Engines are Still Vital to Healthcare Brands

Legacy Search engines continue to drive volume

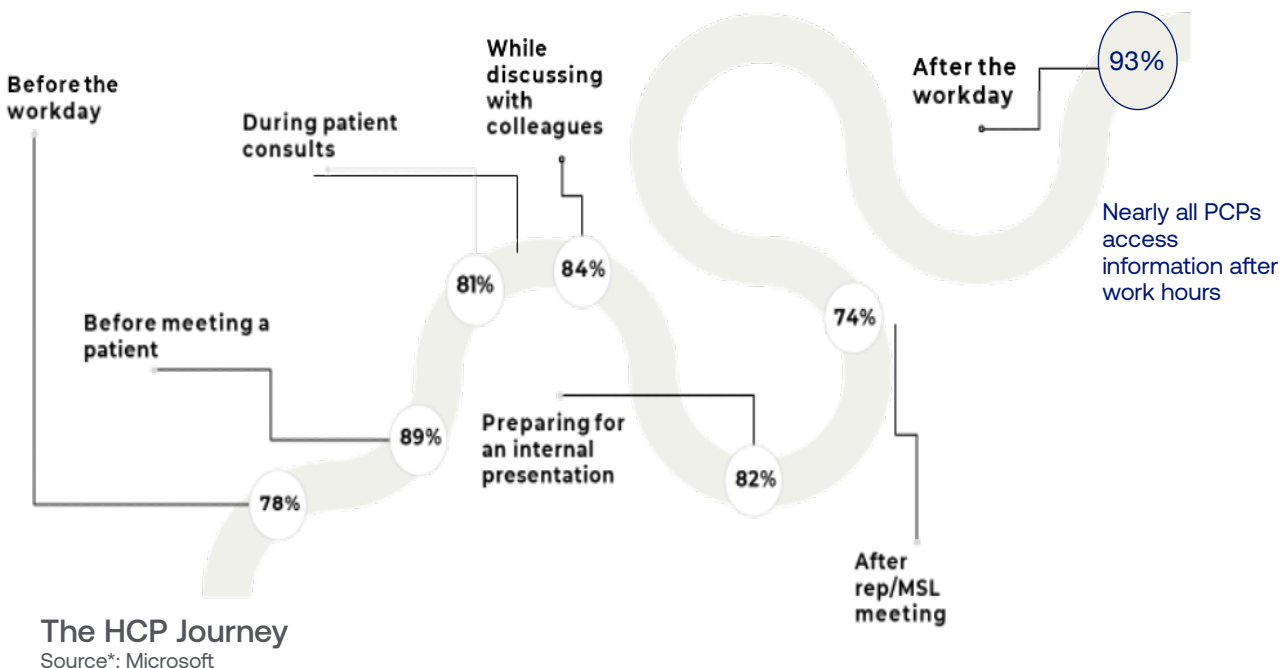
- 70k health searches occur on Google per minute, equating to 7% of Google queries
- 30% of health searchers report Google is the most trusted resource, 2nd only to HCPs
- Rx awareness is 6.7x higher when brands are present on Google search
- Bing.com is seeing a 38% increase in searches driven by Copilot usage

Search leads to action with patients seeking health information

- 56% of patients report search as their starting point
- 16x more likely to talk to their HCP about a treatment once they've clicked on a result

HCPs are leveraging search as their own companion in their journey

- 98% of HCPs use search for health-related information
- 50% of HCPs use search for details about new drugs



Evolving Trends in Search Behavior

Health information is more accessible along the journey than ever before

Desire for Convenience and Ease in the Search Experience

Consumers are actively engaging with healthcare content across entertainment and lifestyle platforms, necessitating a broader definition of where discovery occurs

Discovery of information is no longer confined to traditional search engines. 70% of people tell Omincom Media Group’s (OMG) research platform, Signal, that they are not overwhelmed by the increasing number of search options and are comfortable moving across platforms. 54% of people state that there is no ‘one stop shop’ for search demand.

Younger consumers are redefining the role of social platforms as primary search tools, compelling brands to recalibrate both media mix and messaging strategy.

Percent of Those Using Social as a Search Tool by Generation

Gen Z
79%

Millennial
67%

Gen X
42%

Boomers
28%

Health searches are fluid in their behavior & diverse in their location



The future of discovery is social



Reddit

15% of posts in health communities are recommendations



TikTok

50% of GenZ use TikTok for healthcare info



Pintrest

70MM users on Pinterest search and engage with healthcare specific content

- Expand social listening efforts to monitor social search behavior surrounding conditions and/or Rx products across platforms.
- Apply insights to iterate media placement strategy as well as new content/creative development.

Consumer Preference for Visual Content is Driving Social Search

Social offers patients seeking answers more personal & human responses

High volumes of search interest on social platforms like TikTok are occurring across a wide range of conditions, showcasing the value of entertaining and influential DSE content.

Search term	TikTok search volume	Search term	TikTok search volume
ED	44,126,450	Diabetes	8,733,370
Flu	30,000,380	Constipation	8,699,830
Blood pressure	18,174,690	Allergies	7,866,640
COVID-19	18,154,640	Asthma	6,673,910
UTI	17,306,660	Hypertension	6,170,790
Sinus infection	17,099,650	Norovirus	5,164,100
Kidney stones	16,347,450	Diarrhea	4,686,520
Vitamin D	16,057,690	Miscarriage	4,585,570
ADHD	15,213,050	Dry skin	3,474,970
Arthritis	15,121,740	STDs	3,367,290
Anxiety	14,723,060	Pregnancy symptoms	3,362,540
RSV	11,498,120	Cold symptoms	2,994,100
Sore throat	11,408,380	Heart attack symptoms	2,724,250
Mental health	10,726,010	Menopause	2,080,950
Weight loss	10,609,720	Concussion symptoms	2,068,100
Insomnia	10,173,730	Frequent urination	660,700
Pneumonia	9,836,060	Sleep disorders	549,820
Bronchitis	9,530,910	SAD symptoms	40,320
Cholesterol	9,215,310		

HCPs are transforming their social profiles into virtual offices

4.5 Million members of the North American TikTok community self-identify as a Healthcare Professional.

These HCPs are publishing highly engaging medical “Infotainment” that younger patients are seeking, providing expert advice in layman's terms to democratize access to credible health information.



The Disruptive Force of GenAI

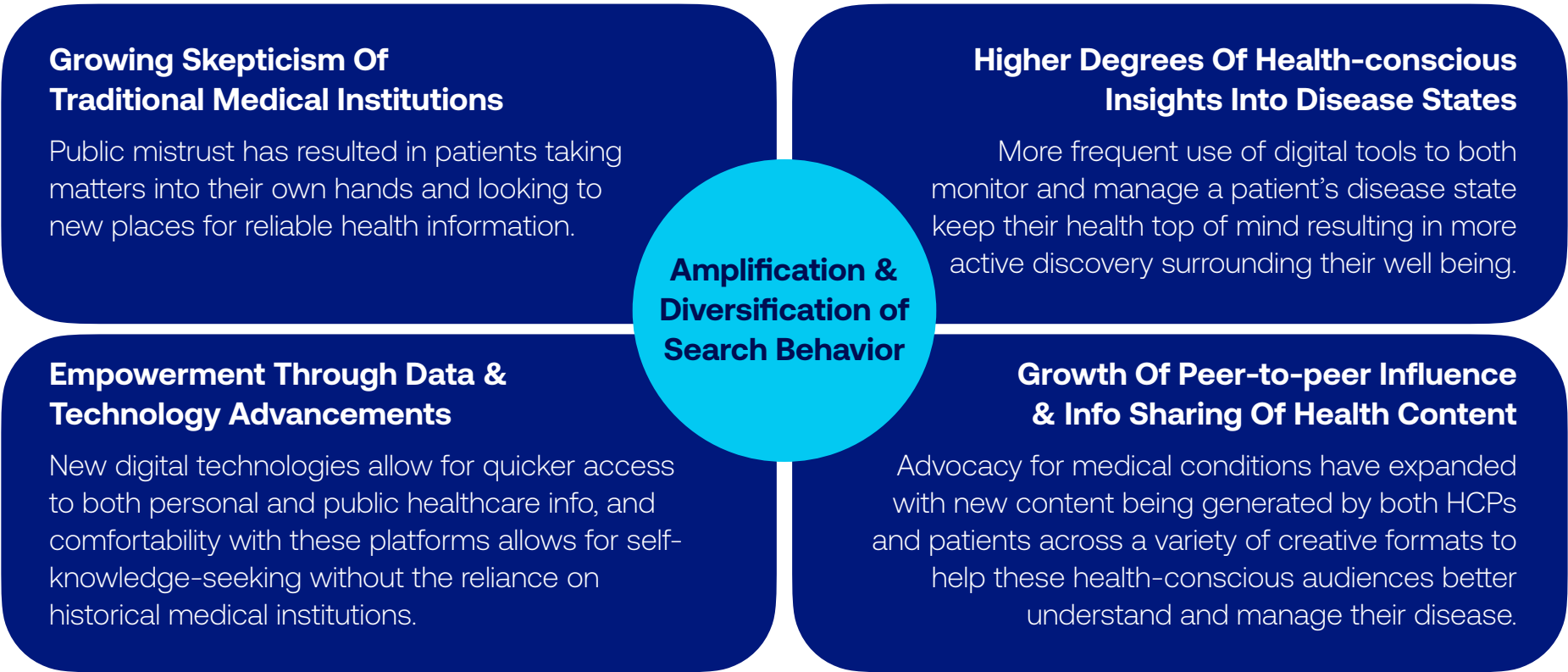
Public perception of healthcare + digital innovations are evolving search behavior

Rising Mistrust Of Pharma & Traditional Medical Institutions Paired With Advancements In Technology Are Leading Patients To Seek More Control Of Their Health

Since COVID-19, several factors have contributed to the public’s mistrust of pharma & medical institutions:

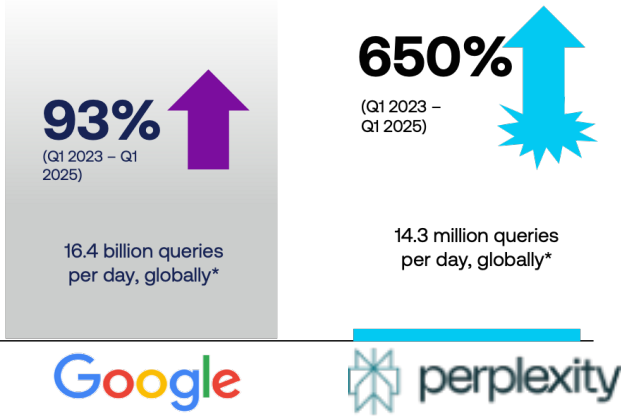
- Pandemic Response
- Spread of Misinformation
- Health Equity Challenges
- RX Drug Pricing
- Drug Safety Exposés

Furthermore, advancements in wearables, connected medical devices, telehealth, GAI and LLMs have dramatically increased access to health information. This allows individuals to quickly find accurate, personalized data about their health, leading to greater awareness and proactive management of their well-being. This increased health consciousness fosters a culture of knowledge sharing, with individuals actively influencing their peers through shared experiences, and the production of “medical infotainment” on social platforms.



The Future State Of GAI In Health Is Highly Personalized And Clinically Proficient

Generative AI (GAI) adoption is accelerating, especially in healthcare, where patient search behavior is increasingly nonlinear. To stay relevant, brands must engage across both traditional and emerging platforms. From Q1 2023 to Q1 2025, Google’s global daily queries rose 93%, while Perplexity AI surged 650%—a clear signal that users are rapidly turning to AI for information. As mainstream platforms like Perplexity, ChatGPT, Gemini, and Co-Pilot gain traction, the future of healthcare AI points to specialized medical systems such as OpenEvidence, Google’s Gamie, and MedLM. Health & Pharma advertisers must prioritize understanding data ingestion and output, balancing innovation with regulatory and privacy demands as they build or partner on proprietary solutions.



The leading AI powered medical information platform which provides evidence-based answers for physicians

A research AI system for diagnostic medical reasoning and conversation training

A family of LLM foundation models purpose-built for healthcare industry use cases

The Disruptive Force of GenAI

As AI becomes more trusted advertisers must shift their strategies

GenAI Is Becoming Trusted & Scaled

40%

Adults say AI-enhanced search features are helpful
(41%, Gen Z; 54%, Millennials; 33%, Gen X; 26%, Boomers)

40%

Are open to receiving brand recommendations from AI-enabled search engines
(38%, Gen Z; 52%, Millennials; 34%, Gen X; 33% Boomers)

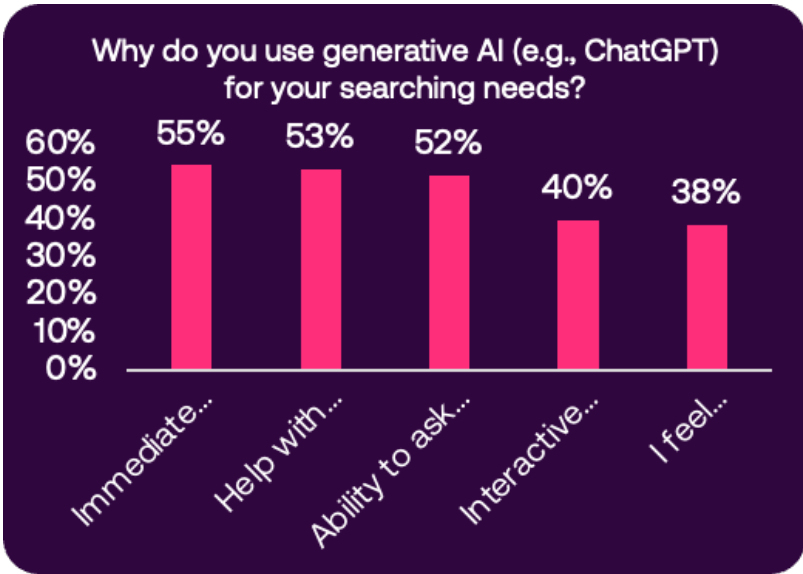
1 in 6

Adults say they use AI chatbots at least once a month to find health information or advice.

1 in 3

Adults trust AI chatbots to provide reliable health information.

GenAI changes the patient expectation on healthcare interactions



GenAI Changes The Patient Journey

AI-powered search is driving shorter search journeys and fewer searches in each journey but also changing how users search.

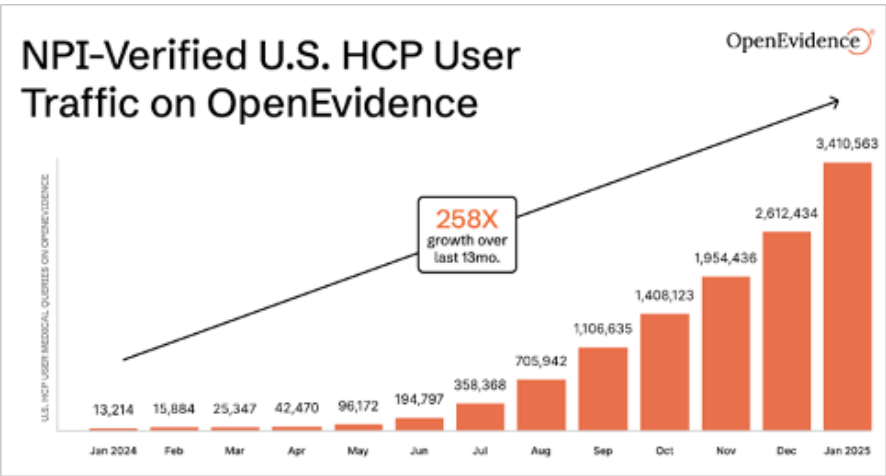
Individual queries are longer, as search becomes more conversational: 8 to 70 characters longer or 20% longer.

The compressed nature of AI-powered search journeys demands greater precision in content delivery and a reorientation toward visibility within zero-click environments.

Strategic shifts need to be made to succeed in these new environments

AI Overviews and zero-click descriptions are presenting users with detailed information in an organized manner to help answer specific questions; to be seen in these environments marketers need to prioritize **Knowledge Ecosystem Optimization (KEO)** approach to their owned digital content.

Pharmaceutical marketers must evolve from legacy SEO/SEM frameworks to a KEO model that prioritizes structured data, clinical credibility, AI-indexable content architecture, and direct answer provision. This involves prioritizing **Experience, Expertise, Authoritativeness, and Trustworthiness (E-E-A-T)**, optimizing for conversational queries, and adapting media strategies to new formats and platforms.



The leading AI-powered medical information platform which delivers evidence-based answers for physicians has seen significant growth and forecasts mainstream adoption of health specific GAI agents in the future

What's Next For Healthcare Success

How to succeed in the modern healthcare digital landscape

Strategic Evolution Powered By A Shift In Consumption Behavior

Participate

Traditional search remains the top driver of healthcare site traffic and is still the starting point for many healthcare audiences; however, the rise in AI agents is driving demand for refreshed website experiences that leverage these new technologies. **Brands must develop website experiences for & with AI technology** to facilitate info-seeking, and mirror new experiences found on the broader web.

Discover

Capture relevant searchers in both passive and active search journeys by expanding presence in new platforms where relevant info-seeking is occurring. Reddit, Pinterest & TikTok should be a focus as these are three platforms where healthcare discovery is growing. **Deploy advanced social intelligence tools to continuously monitor emergent search behaviors and sentiment signals, informing real-time content optimization and media planning.** Use insights to refine media strategy and content development.



Engage

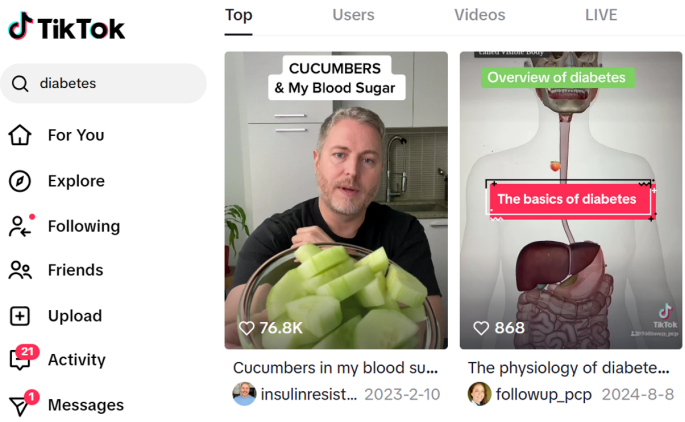
Be present as patients and HCPs search by developing an online presence on high intent sites and platforms. **By maintaining earned and owned digital properties for corporate and brand-specific entities, healthcare marketers can maintain the greatest control of message and control the message and the messenger voice within a nonlinear online environment.**

Advocate

Establish a credible and proactive presence in health-oriented communities by partnering with vetted influencers and deploying structured content frameworks on platforms like TikTok and Youtube that balance reach, risk, and regulatory compliance. **Brands must consider developing social "playbooks"** that define activation opportunities for organic, sponsored, and paid amplified posts **to balance reach, message impact , and compliance requirements.**

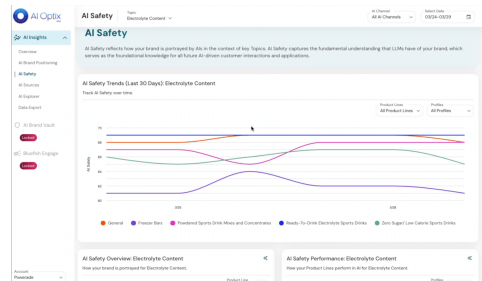
Your doctor has a side hustle on TikTok as an influencer

Doctors are becoming high-profile social media influencers. There are ethical side effects.



Monitor

As consumption behaviors continue evolving throughout the AI evolution, the scopes of measurement must also adapt to provide a complete picture of performance. **Brands must include AI visibility markers, LLM traffic and influence signals, and social listening data** into measurement frameworks **to influence insights, identify opportunities and inform strategic decision making.** Omnicom's proprietary **AI Optix** platform exemplifies the type of next-generation analytics infrastructure required to deliver precision visibility into GenAI impact, LLM-driven traffic, and evolving audience touchpoints.



Lets Talk Search Strategy

The way patients and HCPs search is changing fast. From GenAI and zero-click experiences to TikTok medical influencers and Reddit health threads, discovery now happens everywhere. We're helping healthcare brands evolve their strategies to show up in the moments that matter across platforms, communities, and AI-powered experiences.

Want to learn how we can help your brand stay discoverable and relevant?

Reach out to:



Michael Caruso

SVP of Biddable Media, SSCG Media Group
mcaruso@omc.com



Ameet Luhar

VP, Biddable Media, SSCG Media Group
ameet.luhar@omc.com



Brian Ciullo

Director, Biddable Media, SSCG Media Group
bciullo@omc.com