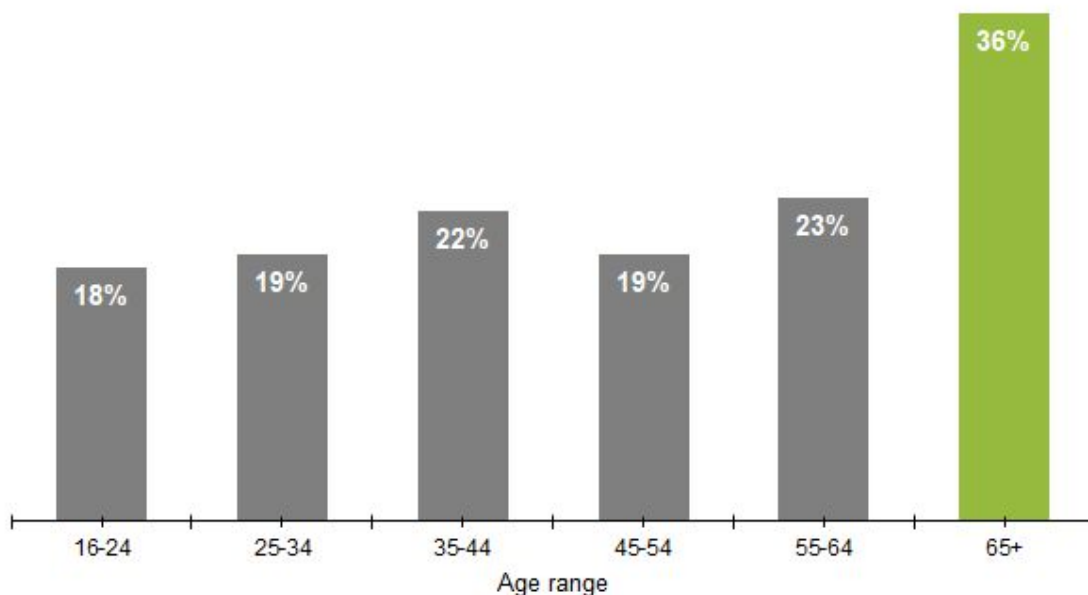


## Who consults doctors online in China? A broader group than you might think

Share of Chinese frequently consulting a doctor online



Source: RIWI data, continuous China tracking, May 6-Nov 22, 2018, 22,589 observations.

Note: Respondents were asked whether they consulted a doctor or other health professional on the Internet in the last six months. Frequently includes 2-5 times and more than 5 times. Other options include never and once.

**Online medical consultations have barely taken off in the US and Canada. The story is different in China. RIWI data on almost 23,000 Chinese Internet users show that nearly two of every five have consulted a doctor or health professional online in the last 6 months.**

**Seniors are the most active:** The most active users of online consultations are seniors and those in rural areas, suggesting that the digital health opportunity in China extends far beyond young urbanites. These data suggest there at least 14 million Internet-using seniors who are already comfortable with frequent online health consultations.

**Broad-based observations:** This is the first independent data on such consultations that does not use paid panelists and that goes beyond the main cities to include all regions of China. It points to a much broader-based audience for digital health - and potentially for all online services - than previously understood.

China provides state-funded health care, but overcrowding has led many Chinese to supplement their health care by paying for services out of their own pocket. The demand for

quality care has opened a market for online consultations. China's largest technology companies, Alibaba Group and Tencent Holdings, have released digital health apps with online consultation capabilities over the last five years. Online consultations promise increased efficiency, better access for rural and older populations, and decreased costs.

How much have Chinese taken up online health care and how broad-based is the take-up? Is China's growing, large group of seniors group open to online consultations? To answer these questions, RIWI randomly engaged over 22,589 people in China. From May to November 2018, we asked respondents across all ages whether they have consulted a doctor or other health professional over the Internet. Online consultations can provide a proxy for broader digital health adoption and provide insights into trends.

### **Seniors Actively Consulting Doctors Online**

Some may assume young people are the main adopters of online activities, but RIWI's data show that many of China's seniors are active online. RIWI data found that, in fact, over one in three of those who use online consultations frequently (two or more times over the last six months) are over age 65.<sup>1</sup> Going forward, we would expect that those seniors who are already active online are more likely to continually use digital health technologies.

Based on these data, we estimate there are at least 14 million Chinese people age 60+ who are already comfortable with frequent online health consultations.<sup>2</sup> As China's population continues to age and Internet usage rates across the country increase, the population of online seniors will expand -- and with it so too will the population willing to use online health care and other digital health technologies.

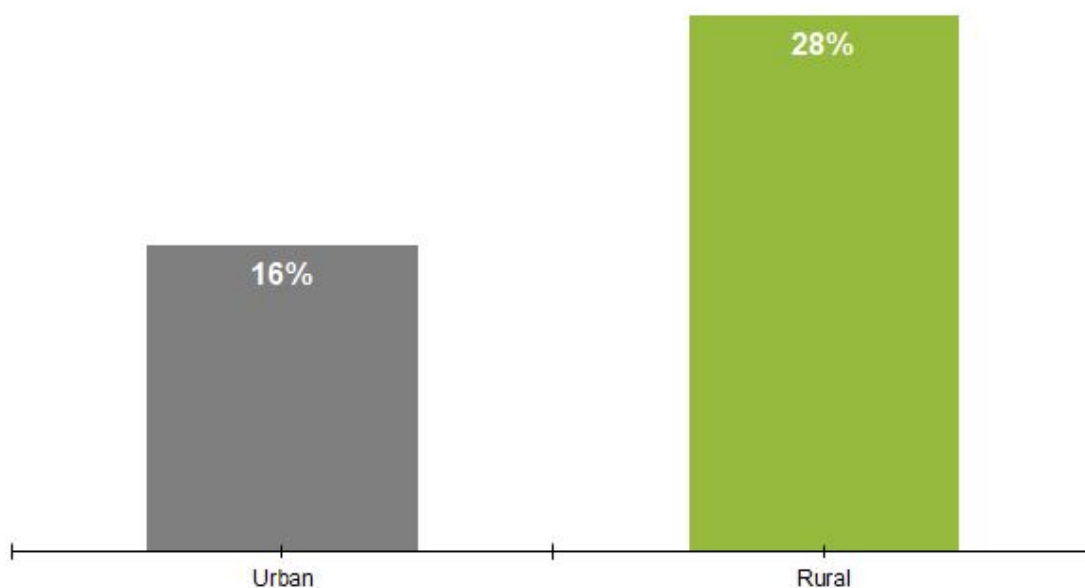
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<sup>1</sup> Promotional offers for online consultations are common in China, so we focused on those who engage in this activity twice or more per week in order to obtain a fuller picture of active use.

<sup>2</sup> We base our calculation on the China Internet Network Information Center's (CINIC) estimate that there were 40 million Internet users over the age of 60 in China in 2017. We assume that the Internet population would grow by 4.6 percent in 2018 (an average of the 2016 and 2017 growth rates from CINIC, a conservative estimate). We then took the one third of RIWI's frequent online consultation users who are seniors to arrive at our estimate of approximately 14 million.

## Rural Residents Consult Doctors Online Frequently

### Share of Chinese frequently consulting a doctor online



Source: RIWI data, continuous China tracking, May 6-Nov 22, 2018, 17,300 observations.

Note: Respondents were asked whether they consulted a doctor or other health professional on the Internet in the last six months. Frequently includes 2-5 times and more than 5 times. Other options include never and once.

RIWI data also found that rural Chinese consulted health professionals online more frequently than those from urban regions<sup>3</sup>. Nearly one of three rural respondents used online consultations twice or more in the last 6 months. This active engagement points to the value of accessibility to consultation for those living in remote areas. While urbanization continues to increase in China, online consultation could prove to become an essential service for those living outside of cities. The uptake is similar throughout China's regions, and across genders.

These findings point to a very large and broad-based audience for digital health in China, far beyond main cities and younger age groups. And it suggests the audience for other online services - such as insurance and banking - is much broader than at first glance as well.

According to Boston Consulting Group<sup>4</sup>, the digital health industry in China is estimated to grow to US \$110 Billion in 2020 from a reported US \$3 Billion in 2014. Investment will potentially fund a wide range of digital health services; online consultation is but one aspect of this industry. This briefing is only a starting point to evaluate the Chinese online health opportunity. RIWI will continue to engage the Chinese population at a large scale to validate or challenge assumptions about how the Chinese consumer views and adopts digital health

<sup>3</sup> 17,300 respondents answered an additional question about where they live.

<sup>4</sup> [Xia et al. 2015](#) The lagged date of this report highlights the need for current data in the industry. We could not find any more recent, reliable data.

and other emerging technologies. RIWI continuously collects data on the behavior and views of the Chinese online population, including in health care, banking, insurance, and employment.

To learn more about RIWI's work in this area, please contact Danielle Goldfarb, Global Head of Research, at: [daniellegoldfarb@riwi.com](mailto:daniellegoldfarb@riwi.com), or **1-416-205-9984 Ext. 4**.

Better, more reliable data depends on hearing from a broad array of voices. In China, RIWI technology captures views of respondents representative of the Web-using population. The randomized respondent-engagement approach gathers broad-based sentiment from across all of China, including from urban and rural regions, and from across age groups. RIWI's proven methodology derives true signals from the online population, including opaque and frontier markets. RIWI respondents remain anonymous and RIWI does not collect any personally identifiable data, allowing respondents to provide their views freely and securely, reducing social desirability bias. RIWI respondents are not incentivized in any way.