

The Google logo, featuring the word "Google" in its signature multi-colored font (blue, red, yellow, blue, green, red).The Compete logo, featuring a stylized green and blue icon followed by the word "compete" in a lowercase, sans-serif font.

The Digital Journey to Wellness

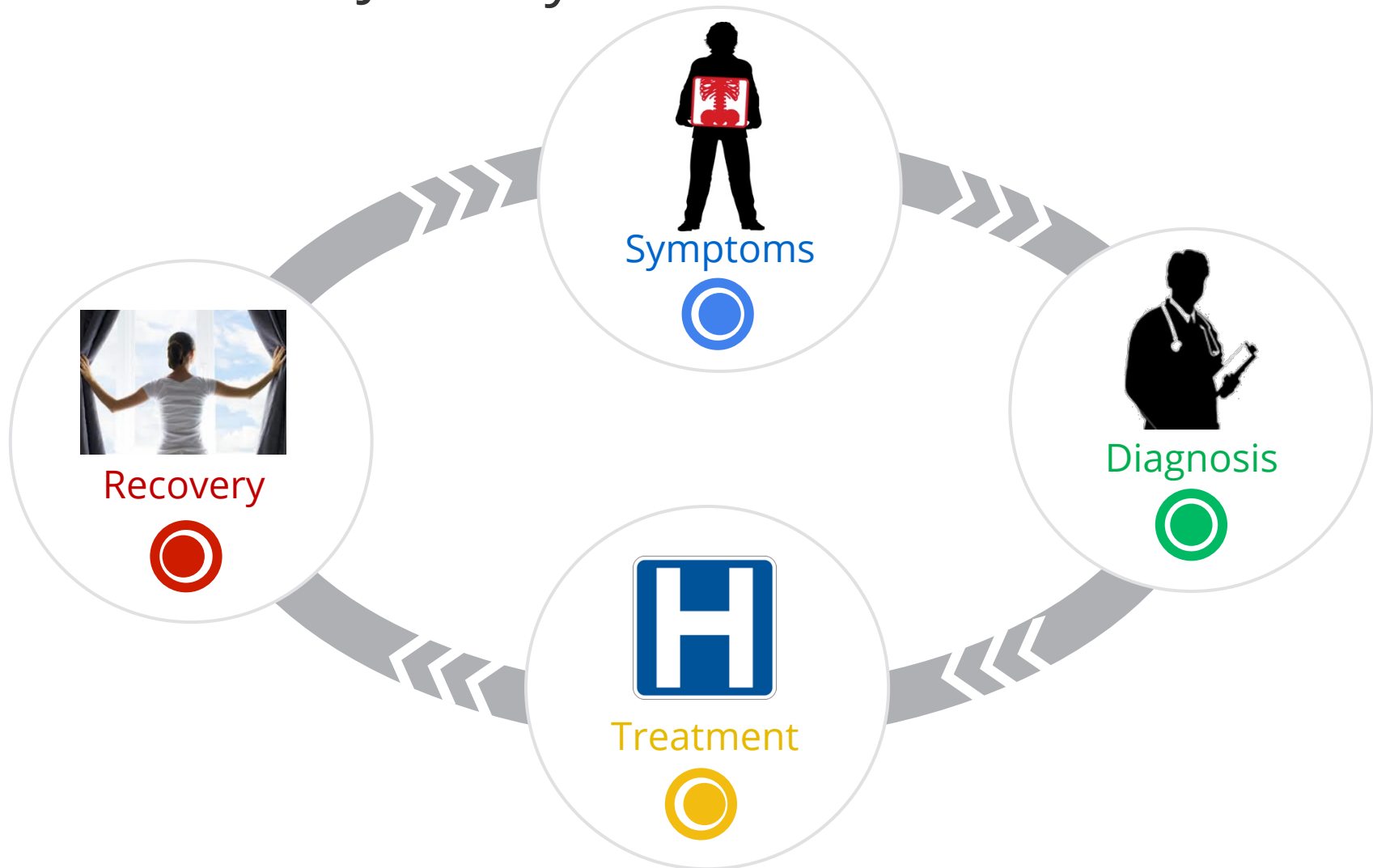
2012 Google/Compete Hospital Study

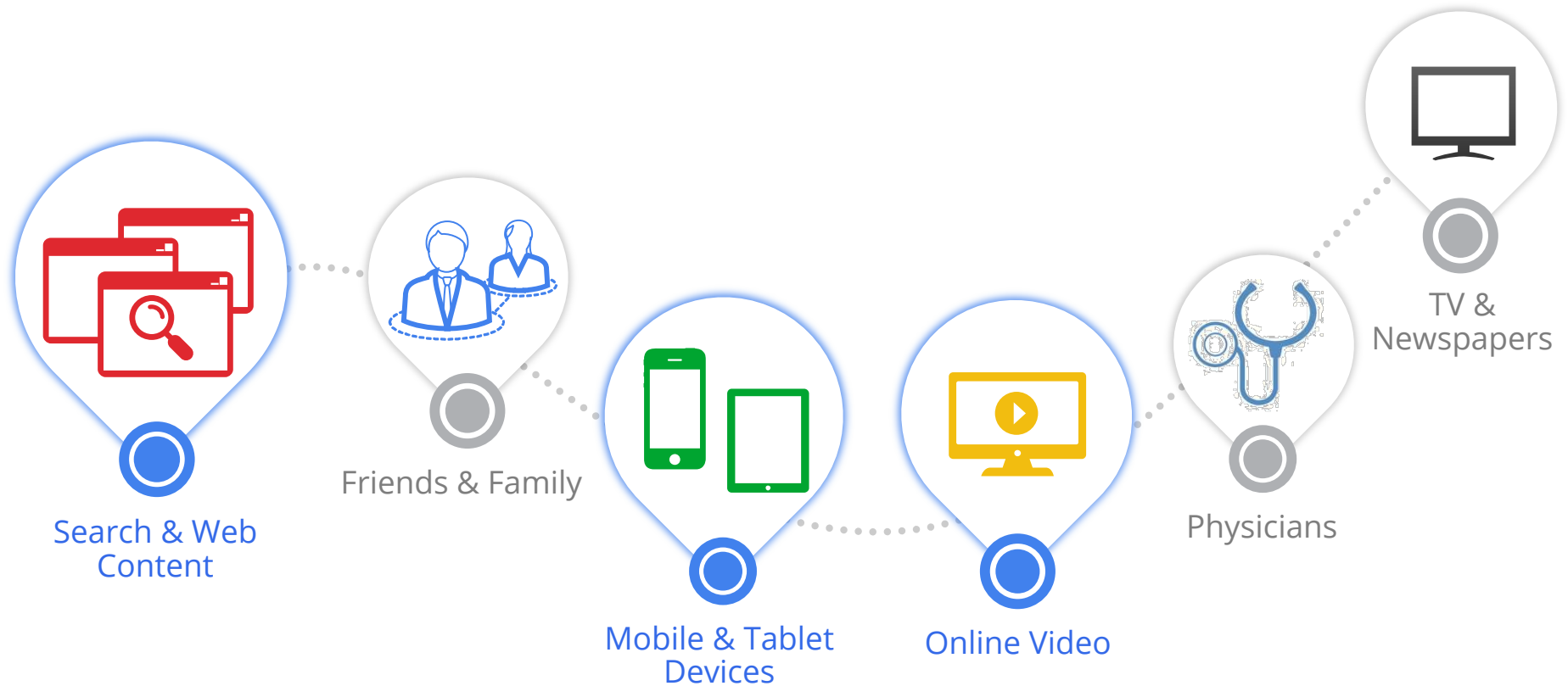


In today's digital world,
prospective patients are now
ACTIVE PARTNERS
in their medical journeys



The Patient Journey





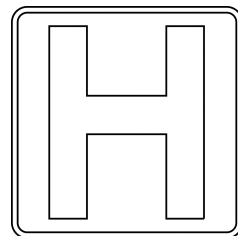
We sought to understand what influences hospital choice and what role **digital** plays in the journey

Overview and Methodology

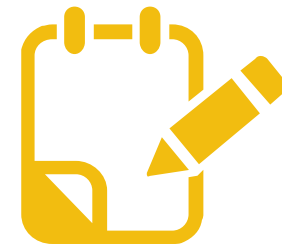
We partnered with **Compete**, a third-party research vendor, to understand how digital drives hospital research and appointments



We **tracked** hospital researchers' activity across online platforms between Q1 '11 & Q1 '12



We **analyzed** online behavior of users from start of research to point of conversion*



We **surveyed** 533 hospital researchers in May and June 2012 to gain behavioral insights

*A conversion was defined as the following: booking an appointment, finding a doctor/location, and contacting a hospital

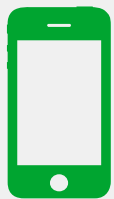


Prospective patients tell us digital matters



Search is indispensable in patient journey

Search impacts brands



Mobile is the patient's constant companion

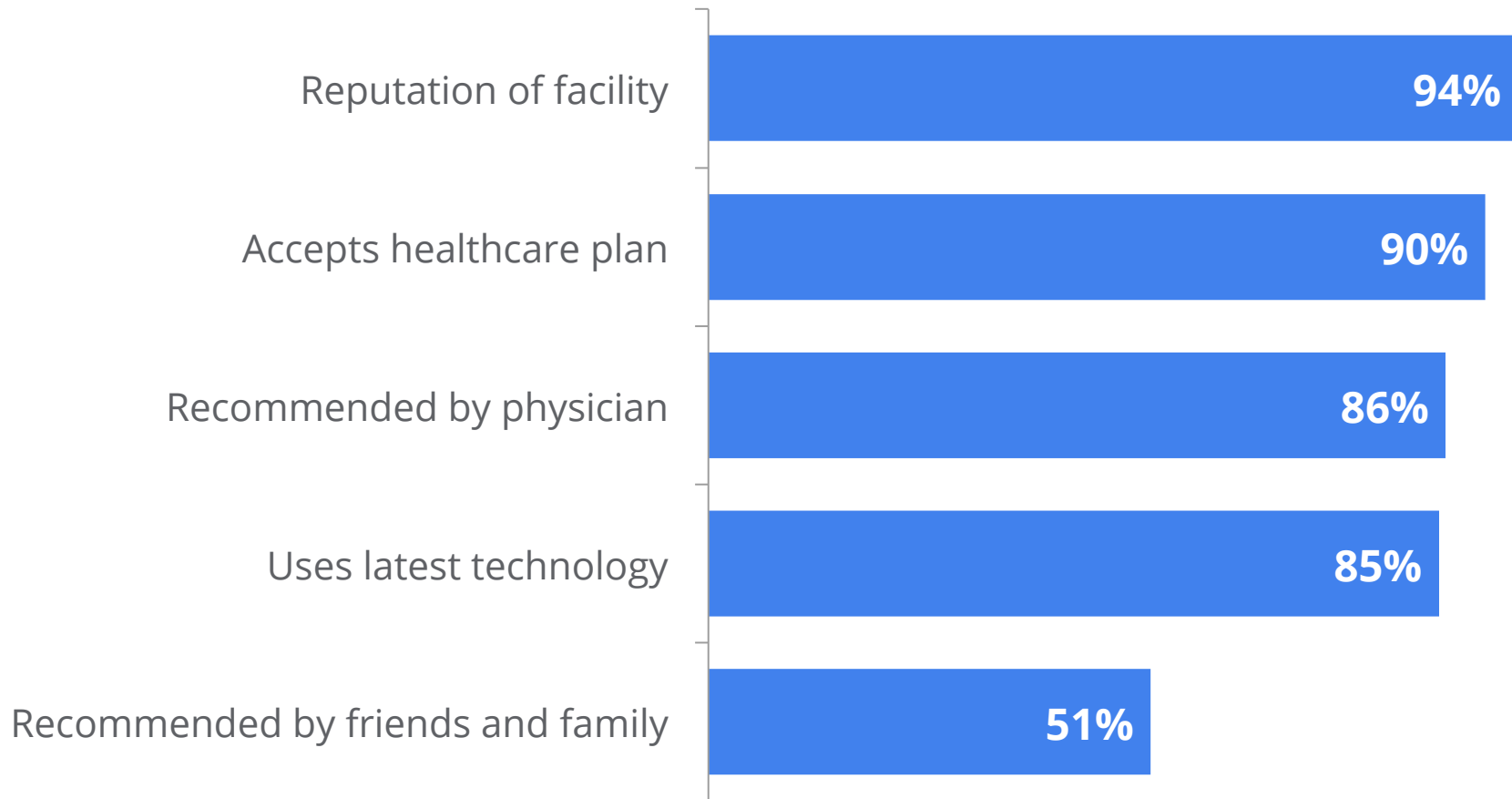
Mobile will be as important as desktop



Online Video informs and connects

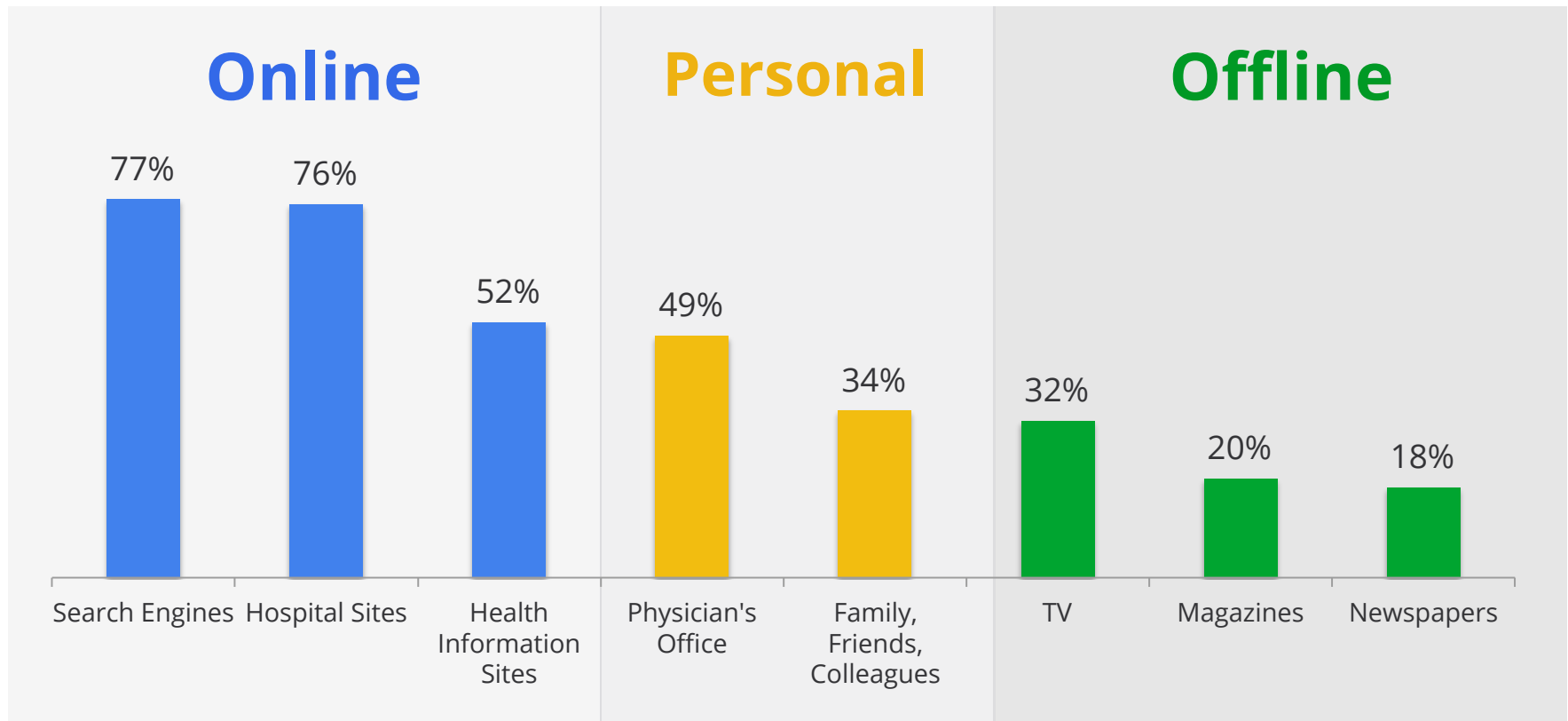
Sight, sound, and motion tell stories & fuels conversions

Brand is important to prospective patients



Online plays a significant role in the research process

84% of patients use both online and offline sources for research



Before booking, patients put in time and consideration to their research

48%

took **over 2 weeks** to research before booking

61%

visited **2+ hospital sites** before converting



For patients who booked appointments, digital content is key to decision-making

Users tapped into the following resources when researching:



83%

Hospital Sites



54%

Health Insurance
Company Sites



50%

Health Information
Sites



26%

Consumer
Generated Reviews

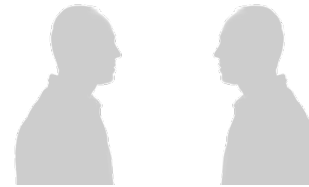
1 in 5 patients is now booking through non-traditional means



21% booking via computer or mobile app/browser



56% called on phone



23% booked in person

After appointments, patients are spreading the word about their experiences

50%

recommended family, friends, and colleagues contact the same facility

12%

posted review on social network site

6%

posted a review on a website



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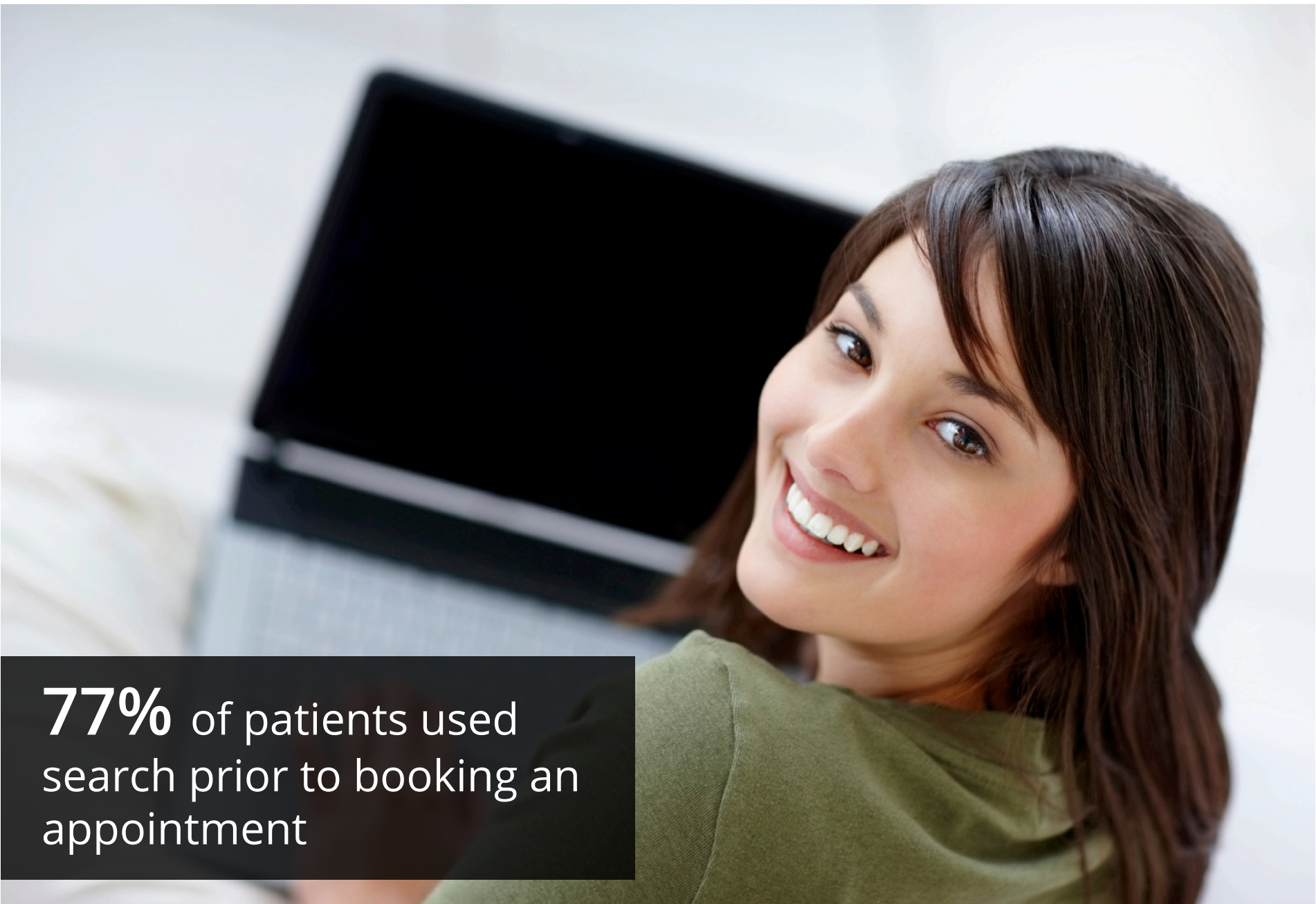
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A young woman with long, dark, wavy hair is smiling broadly, looking towards a laptop screen. She is wearing a green turtleneck sweater. The background is a blurred office or clinical setting with a white wall and a window.

77% of patients used search prior to booking an appointment



Search empowers patients, who leverage it for...

DISCOVERY OF NEW HOSPITALS (21%)

EVALUATION OF SPECIFIC FEATURES (29%)

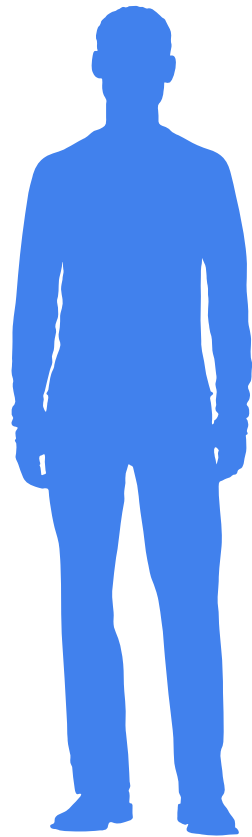
GENERAL INFORMATION (57%)

COMPARISON OF OFFERINGS ACROSS FACILITIES (28%)

CONSIDERATION OF HOSPITALS THEY KNOW (16%)

Search drives more valuable visitors to hospital sites than other traffic sources

43% of visits to hospital sites originate from a search engine



Searchers

22M
unique visits

4.4%
conversion rate

958K
conversions



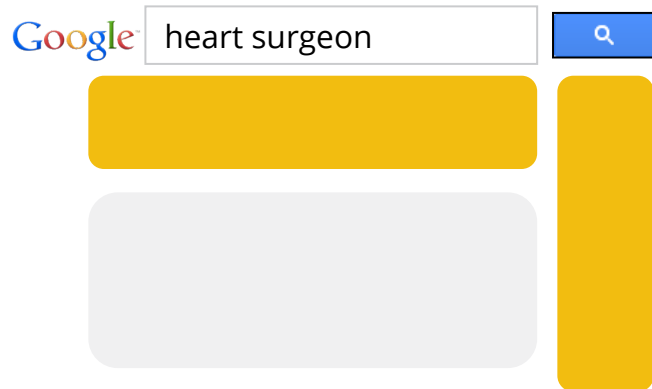
Non-Searchers

6M
unique visits

4.2%
conversion rate

243K
conversions

When patients see a paid search ad, they take action



35% Conduct searches for more information

29% Begin the research process

28% Visit website of hospital advertised

21% Consider hospital that was advertised

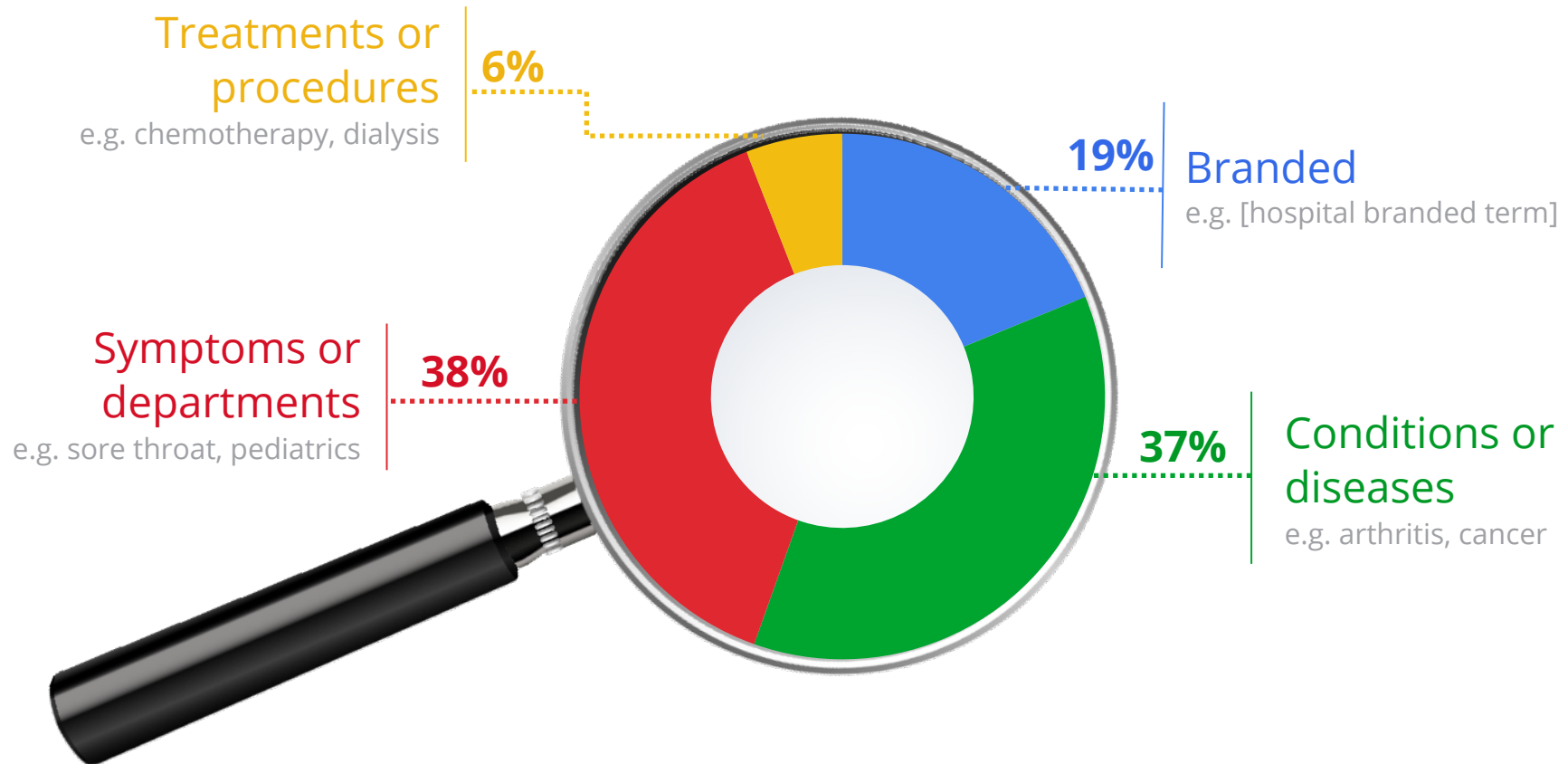
5% Contact hospital that was advertised

Each patient creates a unique search path



Patients used nearly
4k unique search paths,
with the top 20 paths
representing
65% of all patient paths

Search paths are highly diverse and comprised primarily of symptoms and conditions terms



Most paths begin with a non-branded term, when patients are in the early stages of research



Share of patients that started on:

10%

49%

6%

35%

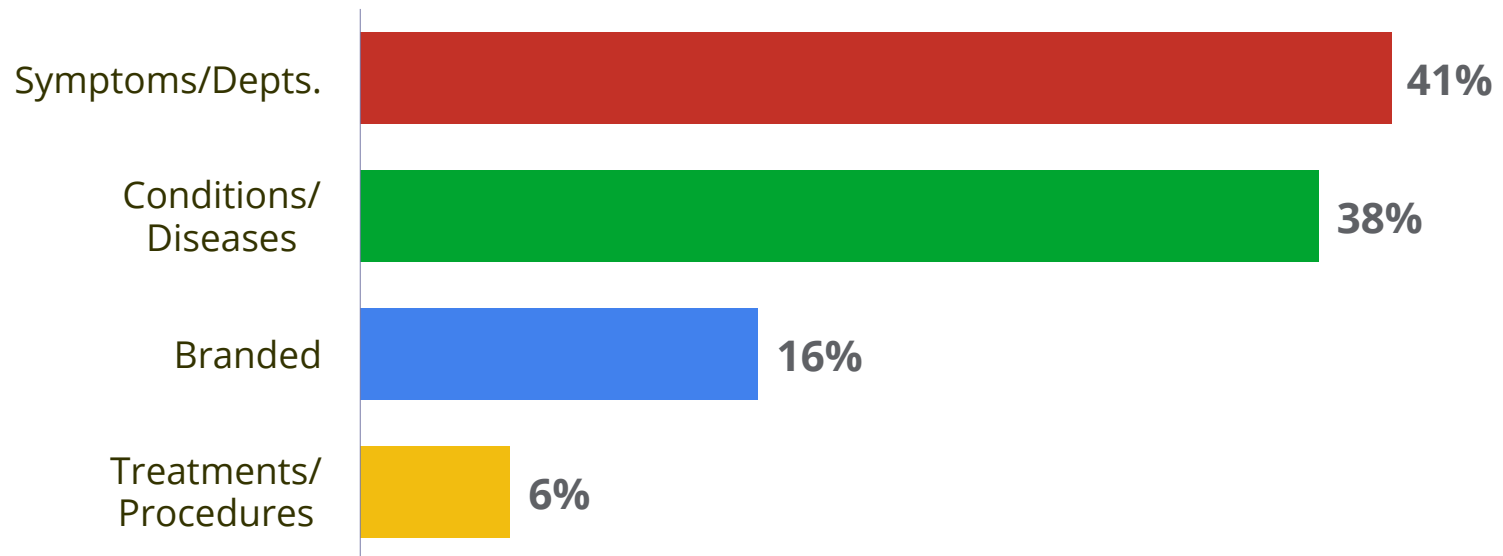
Branded

Conditions/
Diseases

Treatments/
Procedures

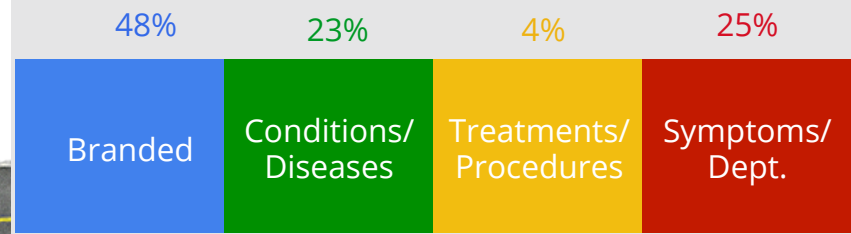
Symptoms/
Dept.

Search paths continue primarily on non-branded terms towards the moment of conversion

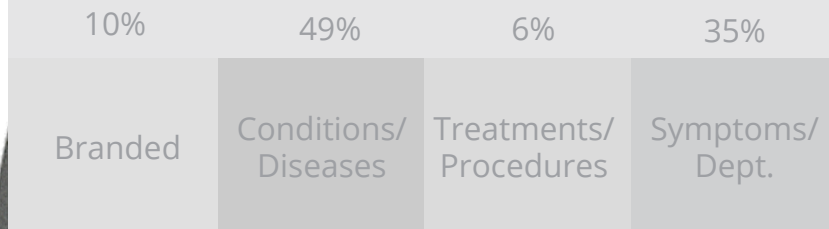


Nearly half of patients finish their paths with a branded term

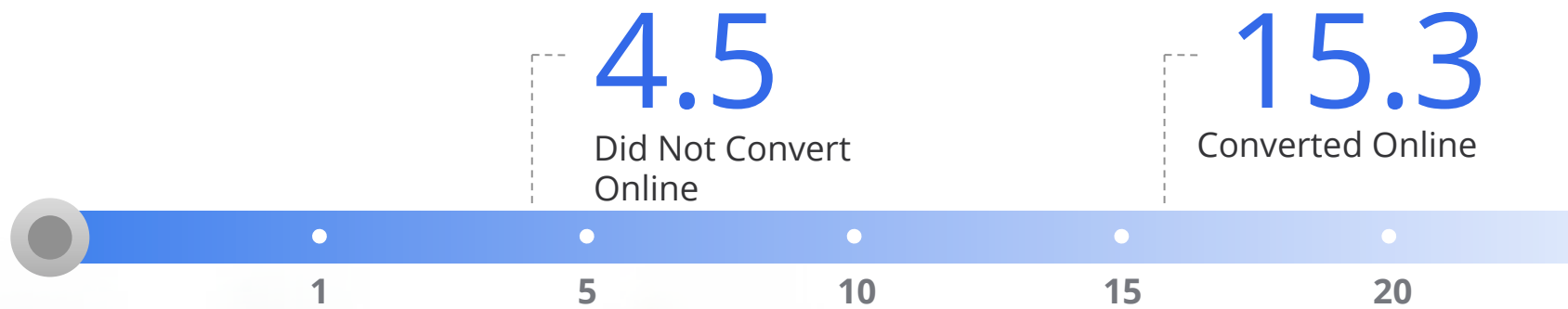
Share of patients that finished on:



Share of patients that started on:



Patients who booked appointments conducted 3x as many searches than those who didn't

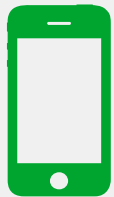


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Patients are across all devices when researching



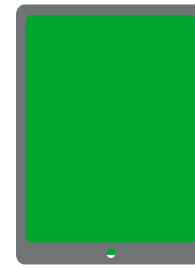
98%

desktop or laptop



10%

mobile phone

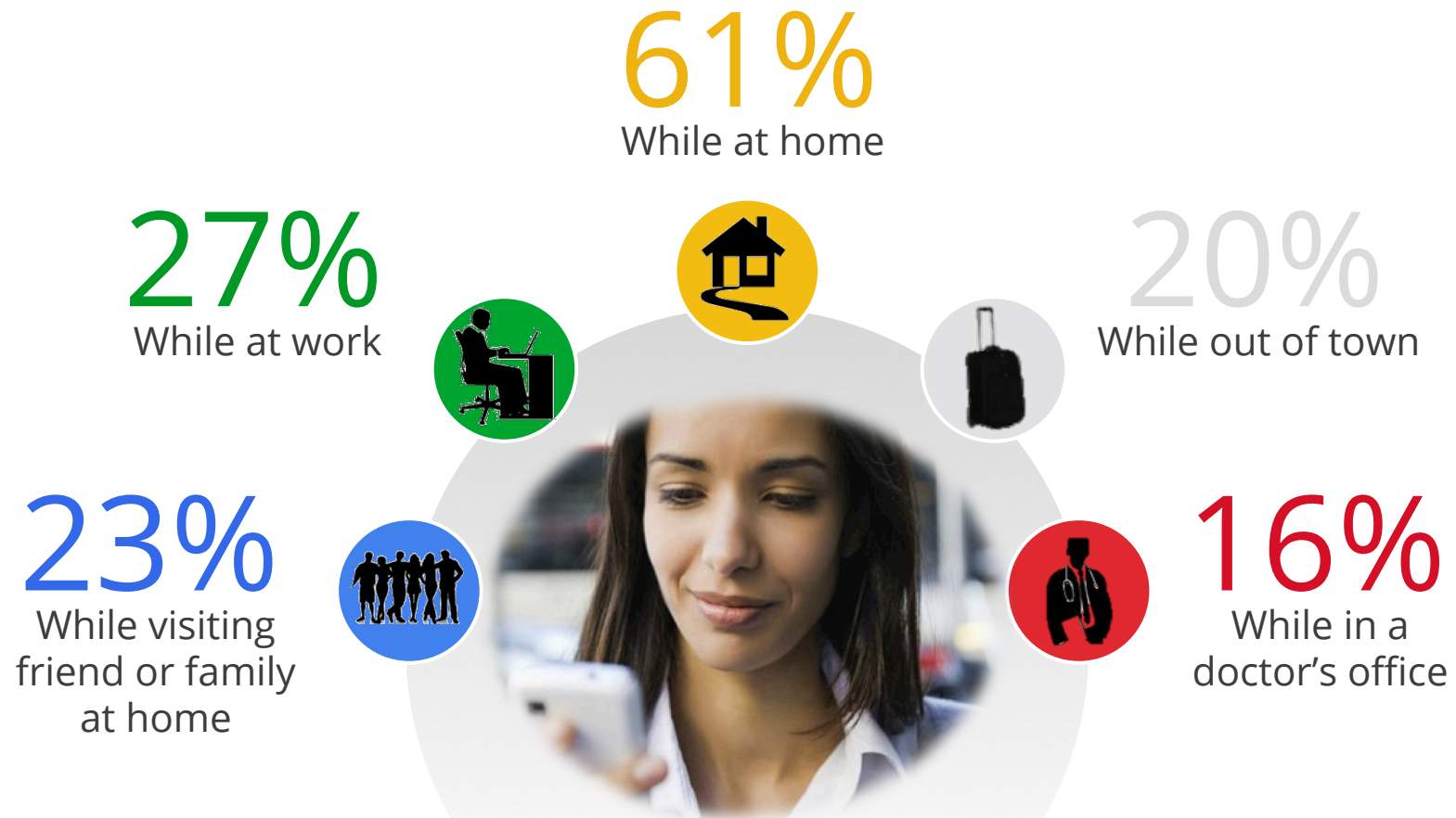


8%

tablet

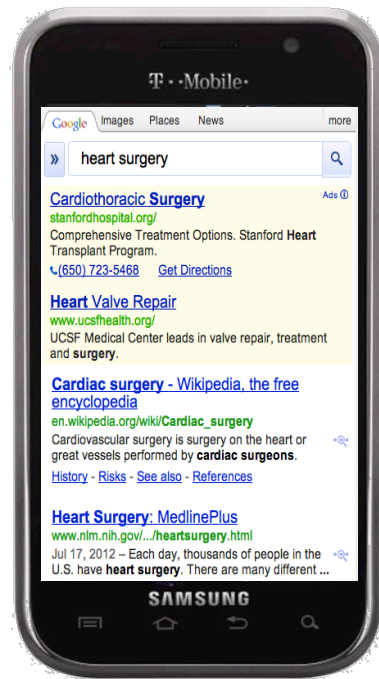
Roughly **1/3** of patients used tablets or mobile devices on a **daily basis** for research and/or to book appointments

Mobile is a constant research companion



Patient behavior differs across search and sites

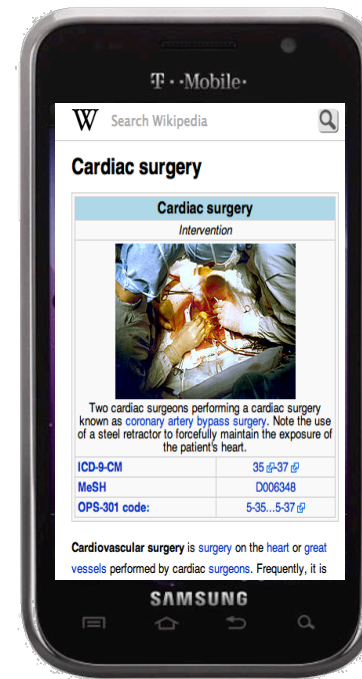
Mobile **search** used to:



Compare offerings across facilities (26%)

Discover brands I wasn't aware of (18%)

Mobile **sites** used to:

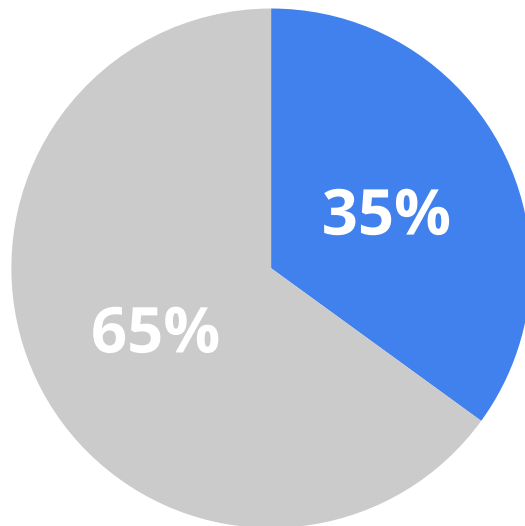


Read reviews of facilities (29%)

Locate a facility for treatment (27%)

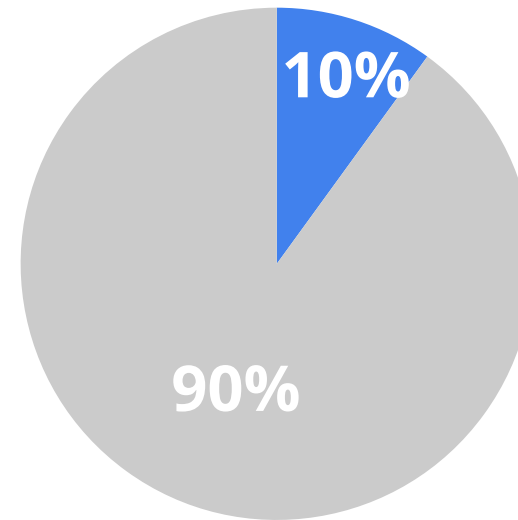
Patients who used a mobile device to research watch online videos in greater numbers

Mobile Device Researchers



■ Yes ■ No

Computer Only Researchers



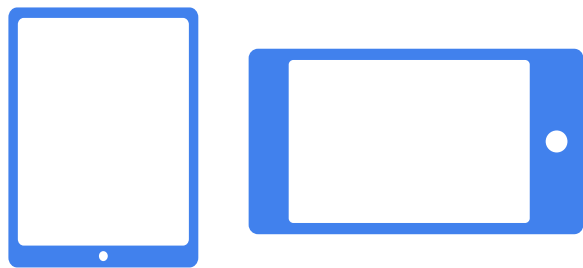
■ Yes ■ No

... and are also more likely to schedule an appointment

Mobile Device Researchers

44%

Scheduled an appointment



Computer Only Researchers

34%

Scheduled an appointment





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Online video is a pivotal component of hospital research



1 in 8 patients watched an online video on:

Hospital Sites (42%)

Health Insurance Information Sites (31%)

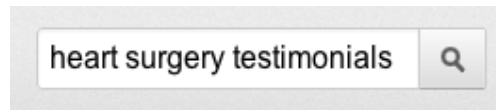
Health Information Sites (30%)

YouTube (29%)

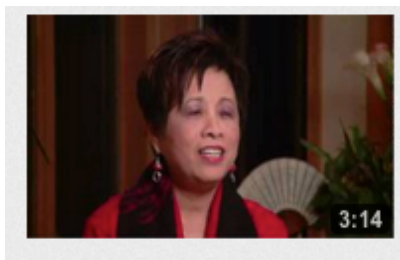
Health Insurance Company Sites (20%)

53% of patients who didn't watch hospital videos were unaware they existed

Patients seek video reviews and testimonials to learn about hospitals and treatment options



"Faces of Heart Diseases"



"Aortic Valve Surgery: Patient Testimonial"

What they watch

43% Patient testimonials

32% Patient-generated content

Why they watch

64% Obtain information about hospitals

56% Understand complicated treatments and procedures

After watching online videos about a hospital, patients...



- ✓ **talk to friends, family, or colleagues** about the hospital
- ✓ **share** an online video
- ✓ **contact** a hospital
- ✓ **schedule** an appointment

Online video drives patients to hospital sites, where they are more likely to convert



YouTube traffic to hospital sites has increased **119% YoY**



30% of patients who watched an online video booked an appointment

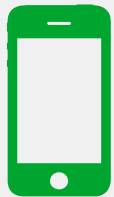


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Next questions to answer as a hospital marketer



Have you covered all search paths?

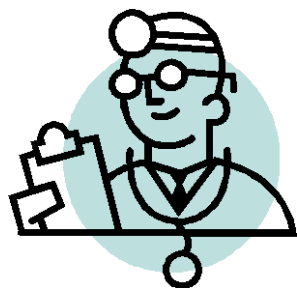
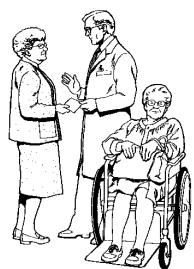


Do you have a mobile strategy?



How are you leveraging your video assets?

Appendix





Methodology: Hospital Industry Definitions

Brands	Conversions
Allina	Schedule/Request Appointment
Aurora Health Care	Find a Location
Banner Health Care	Find a Doctor
Baylor Health Care System	Contact Us
Cancer Treatment Centers for America	Refer a Patient
Cleveland Clinic	
Laser Spine Institute	
Mayo Clinic	
M.D. Anderson Cancer Center	
Memorial Sloan-Kettering Cancer Center	
St. Jude Children's Research Hospital	
University of Pittsburg Medical Center	

Methodology: Term Buckets

1. Hospital Branded: search containing a hospital brand
e.g. [\[hospital branded term\]](#)
2. Conditions/Diseases: search containing a condition/disease
e.g. [allergies, asthma](#)
3. Treatment/Procedures: search containing a treatment or medical procedure query
e.g.. [hip surgery, liposuction](#)
4. Symptoms/Doctors/Depts: search containing symptoms, doctor terms or hospital departments
e.g. [fever, find a doctor, oncology](#)