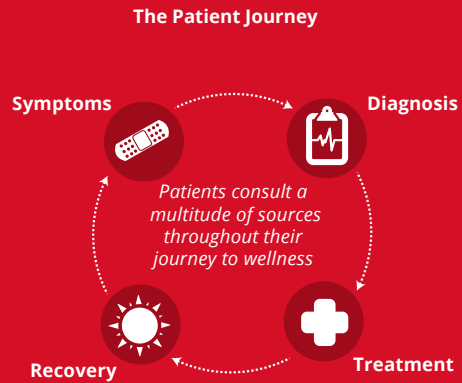


THE DIGITAL JOURNEY TO WELLNESS: HOSPITAL SELECTION

PROSPECTIVE PATIENTS TELL US DIGITAL MATTERS



61% visited 2+ hospital websites before converting

48% research more than 2 weeks before scheduling an appointment

What users look for in a hospital



1 in 5 patients now book through a computer or mobile app/browser

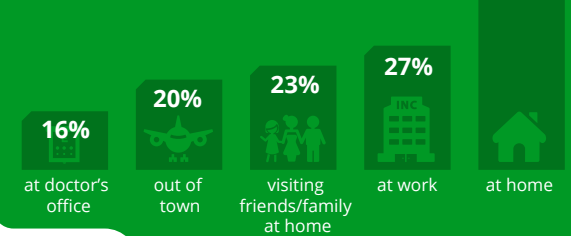
Online plays a significant role in the research process

84% of patients used both online and offline resources

MOBILE IS A CONSTANT RESEARCH COMPANION

Roughly 1 in 3 patients used mobile devices daily for hospital research and/or to schedule appointments

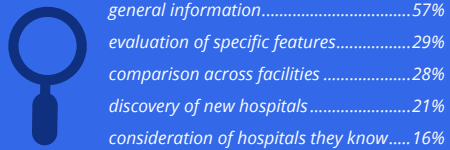
People use their mobile devices to research hospitals while...



SEARCH IS INDISPENSABLE IN THE PATIENT JOURNEY

77% OF PATIENTS USED SEARCH PRIOR TO SCHEDULING AN APPOINTMENT

Search empowers patients, who leverage it for

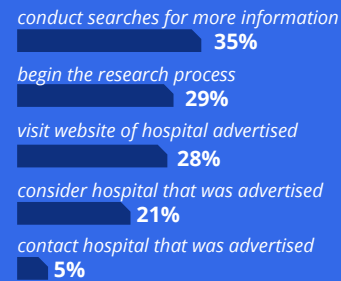


3x

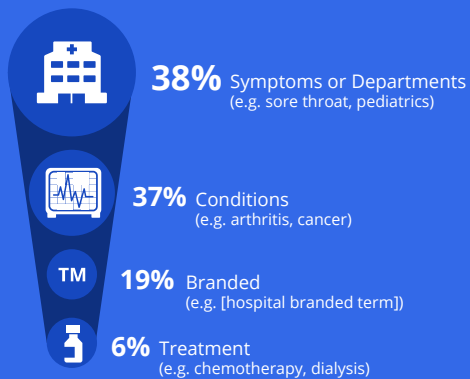
Search drives 3x as many visitors to hospital sites compared to non-search

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

After seeing a paid search ad, patients...

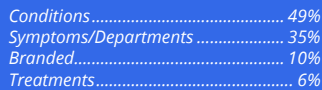


Search paths are highly diverse and comprised primarily of symptoms and conditions terms



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

Share of patients that started on:

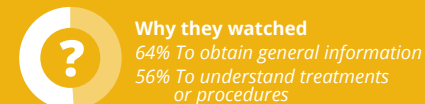


Nearly half of patients finish their paths with a branded term

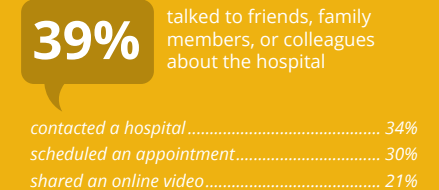


ONLINE VIDEO INFORMS AND CONNECTS

1 in 8 WATCHED A HOSPITAL VIDEO; OF THOSE WHO DIDN'T WATCH **53%** WERE UNAWARE THEY EXISTED



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



Patients who used a mobile device to research are more likely to make an appointment

