

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

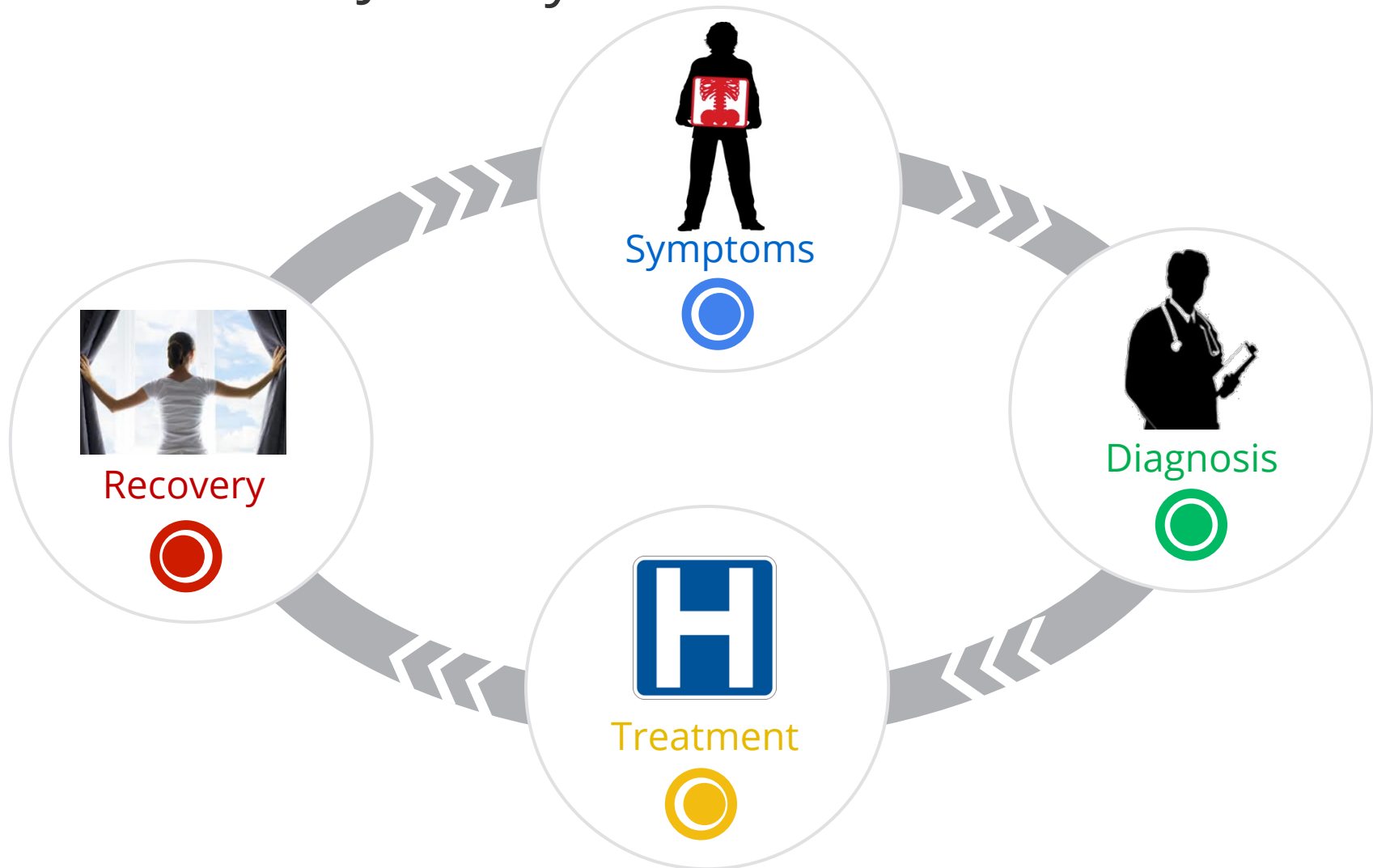
2012 Google/Compete Hospital Study

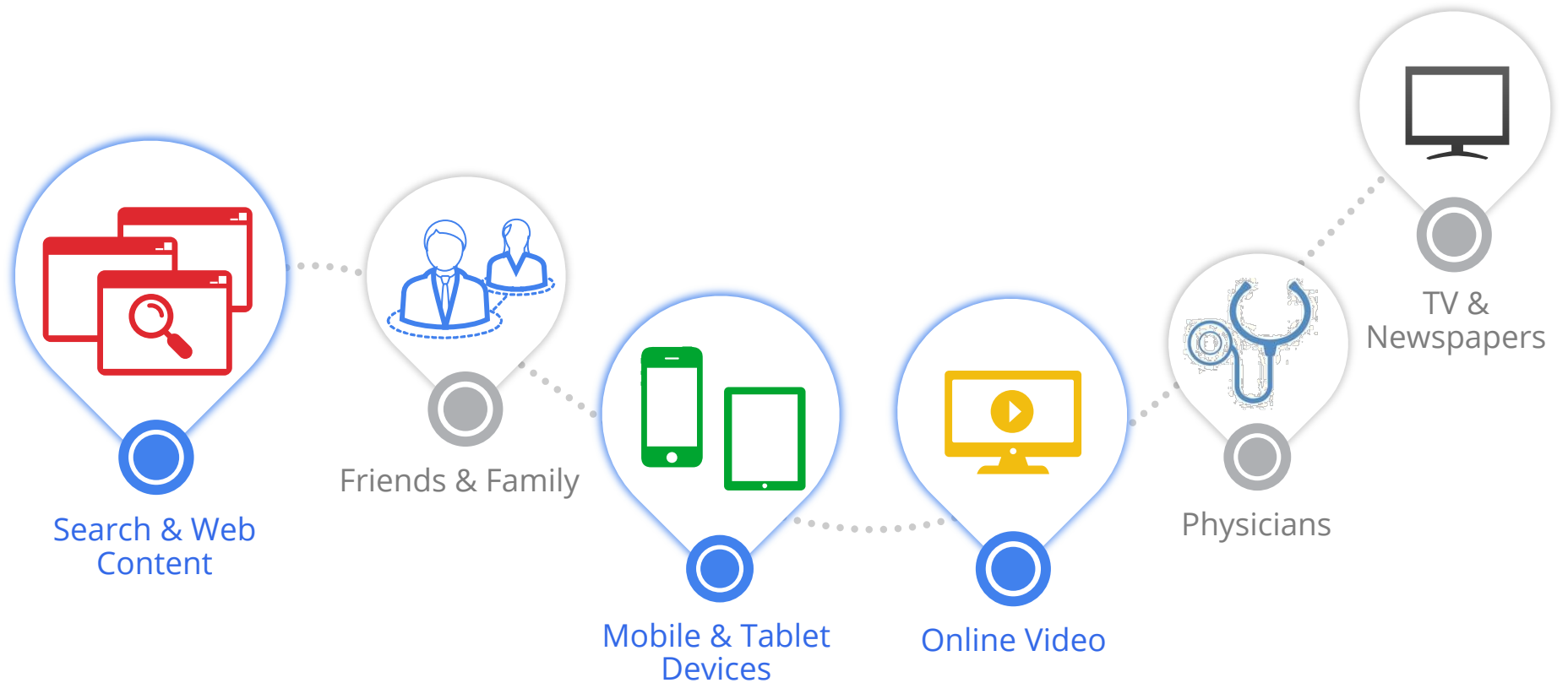


In today's digital world,  
prospective patients are now  
**ACTIVE PARTNERS**  
in their medical journeys



# The Patient Journey





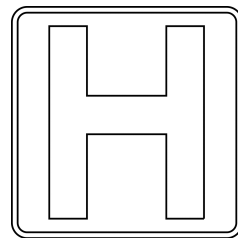
We sought to understand what influences hospital choice and what role **digital** plays in the journey

# Overview and Methodology

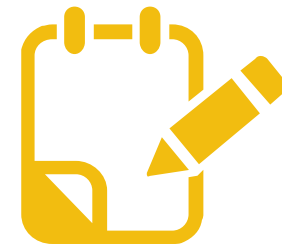
We partnered with **Compete**, a third-party research vendor, to understand how digital drives hospital research and appointments



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

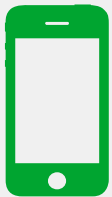


## Prospective patients tell us digital matters



### **Search** is indispensable in patient journey

Search impacts brands



### **Mobile** is the patient's constant companion

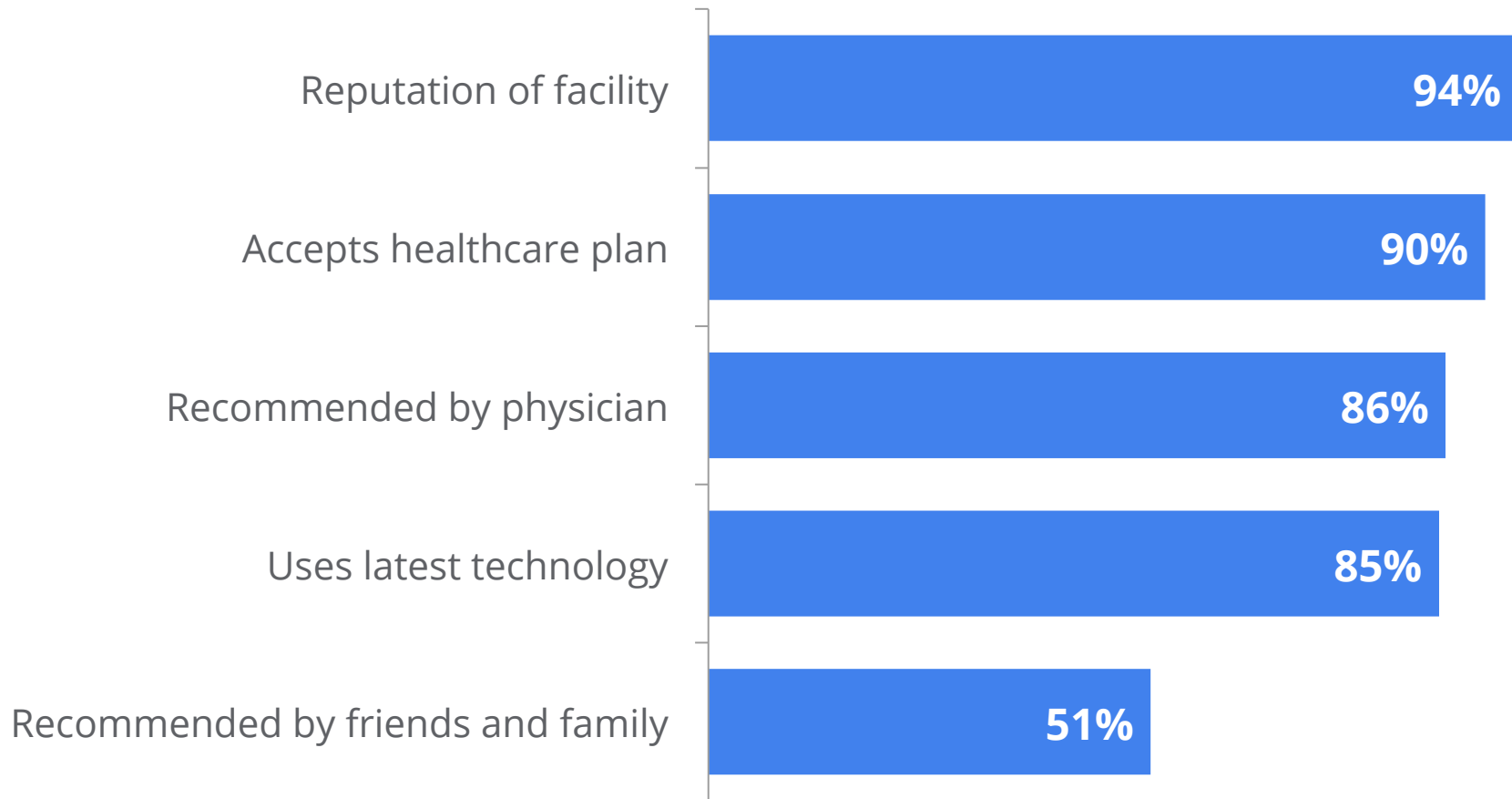
Mobile will be as important as desktop



### **Online Video** informs and connects

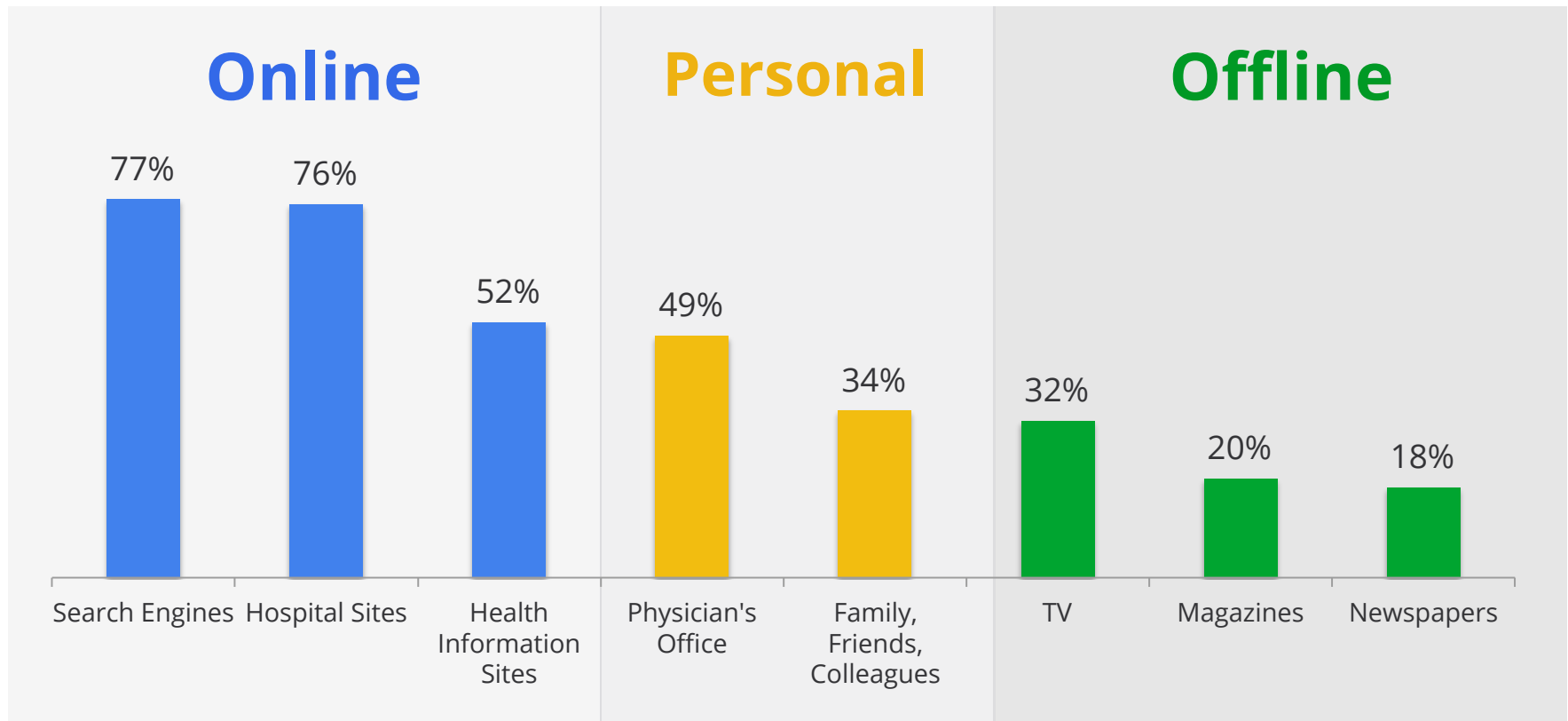
Sight, sound, and motion tell stories & fuels conversions

# 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

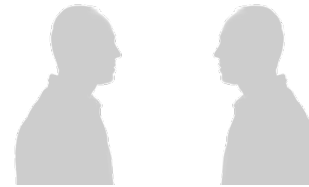
# 1 in 5 patients is now booking through non-traditional means



**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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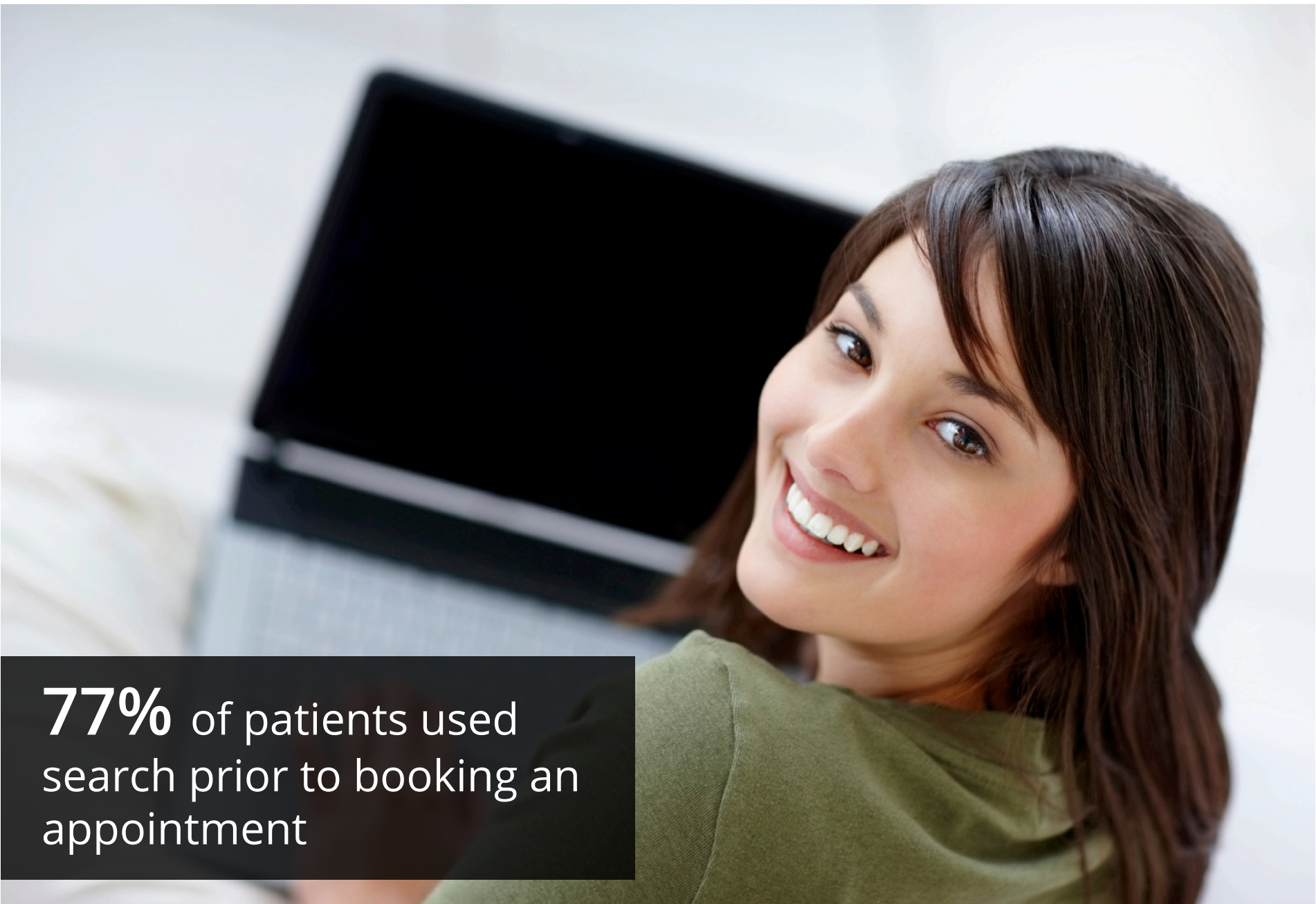
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**77%** of patients used search prior to booking an appointment



Search empowers patients, who leverage it for...

DISCOVERY OF NEW HOSPITALS (21%)

EVALUATION OF SPECIFIC FEATURES (29%)

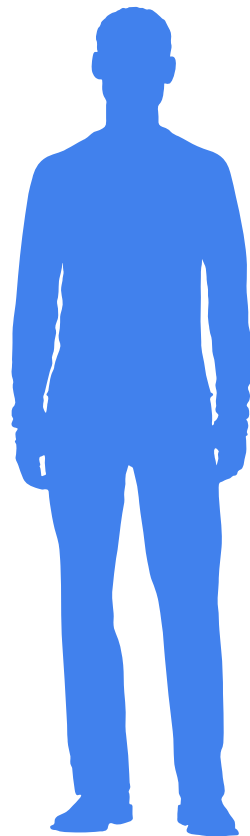
**GENERAL INFORMATION (57%)**

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

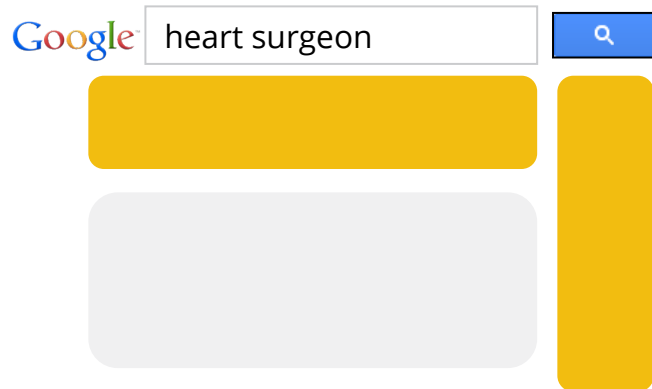
**6M**  
unique visits

**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

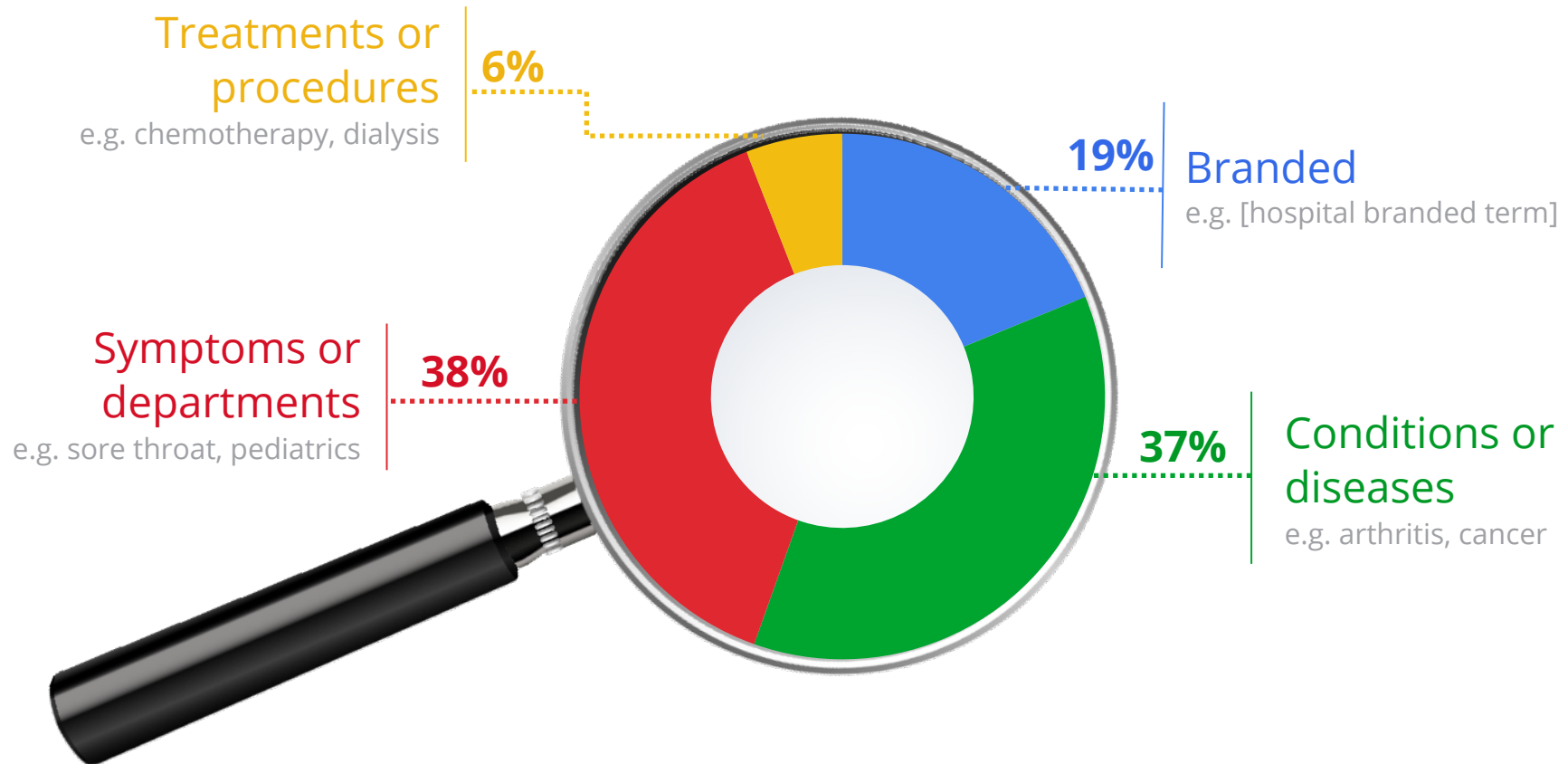
**5%** Contact hospital that was advertised

## 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%

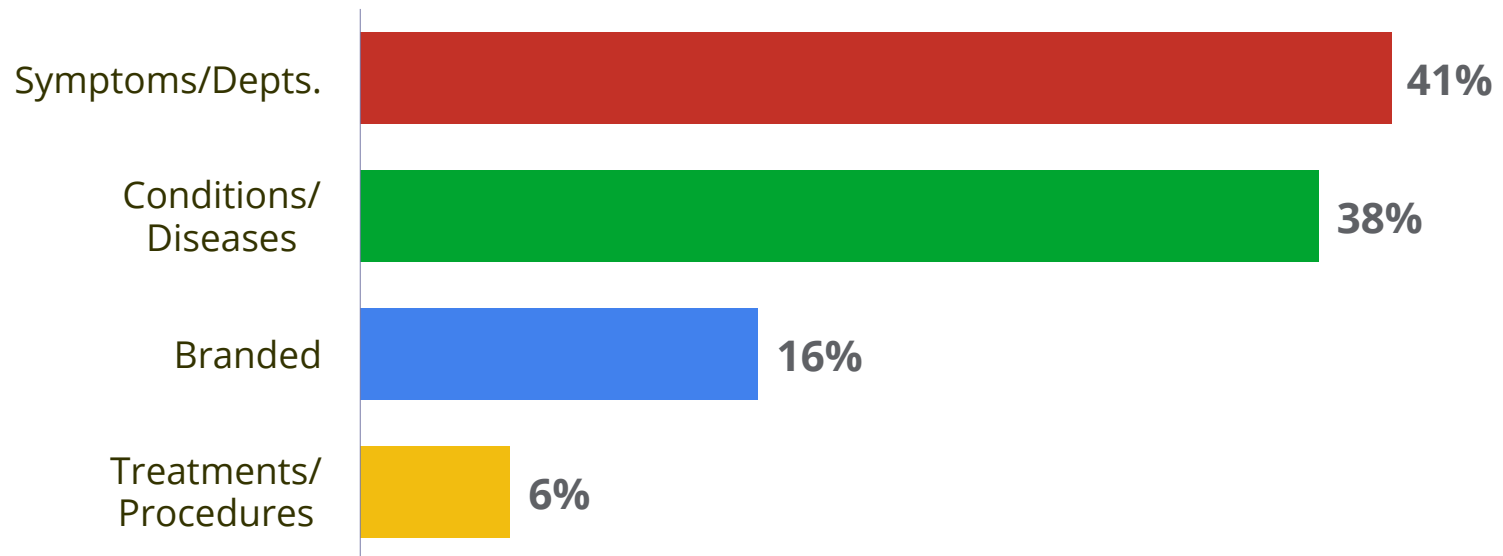
Branded

Conditions/  
Diseases

Treatments/  
Procedures

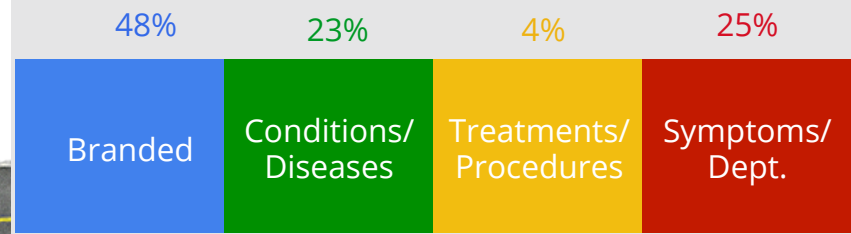
Symptoms/  
Dept.

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

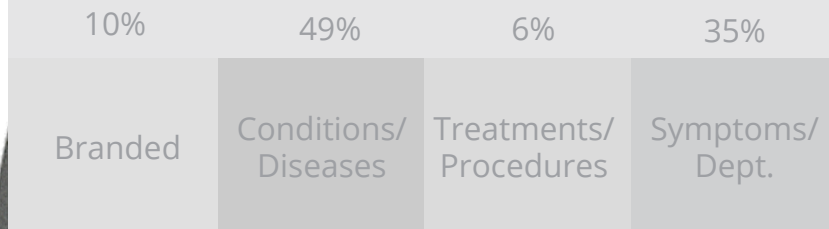


# Nearly half of patients finish their paths with a branded term

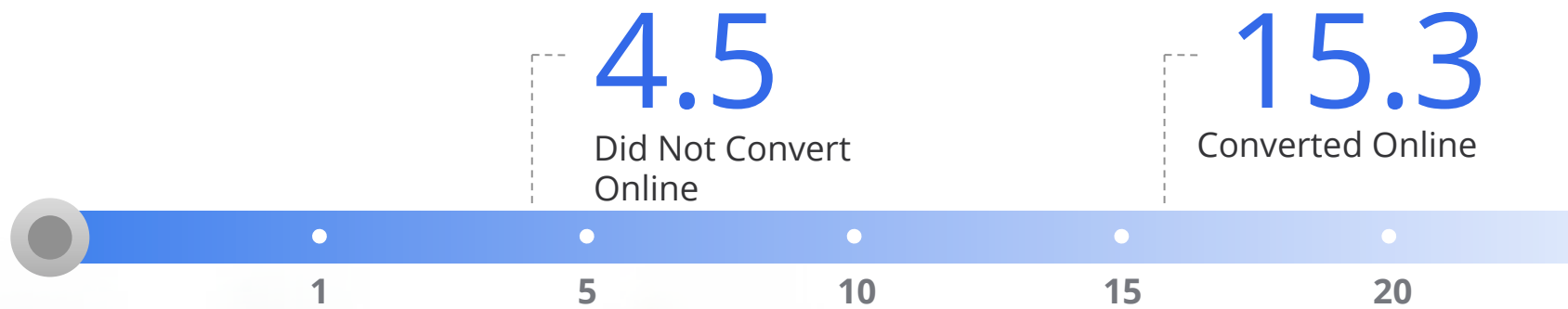
Share of patients that finished on:



Share of patients that started on:



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



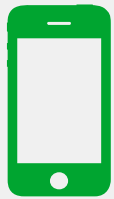


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# Patients are across all devices when researching



**98%**  
desktop or laptop



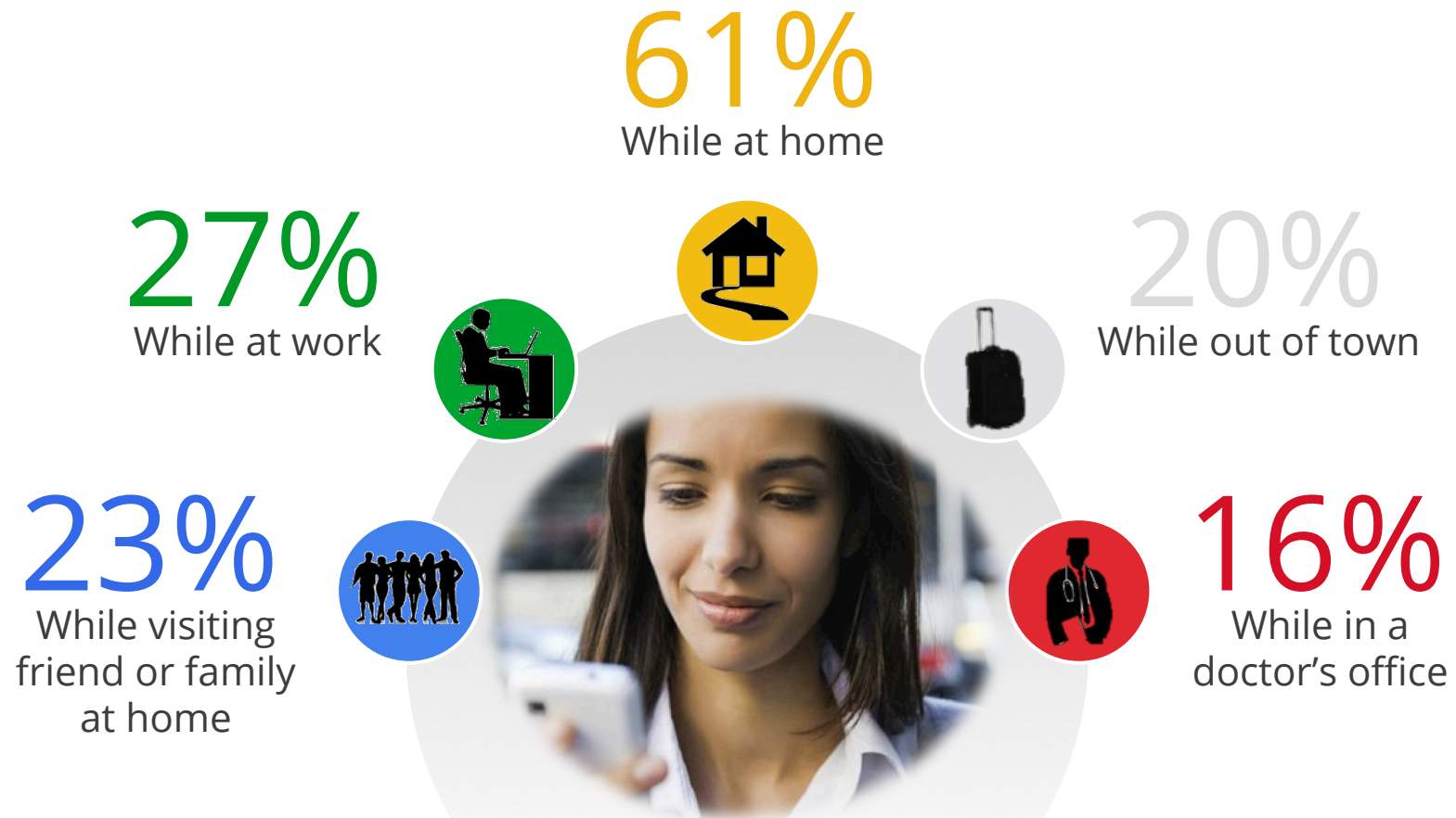
**10%**  
mobile phone



**8%**  
tablet

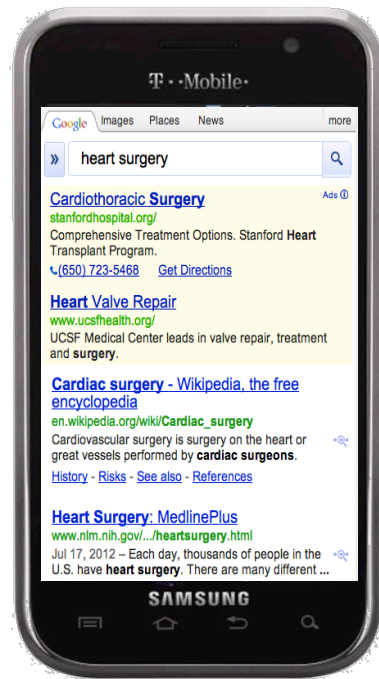
Roughly **1/3** of patients used tablets or mobile devices on a **daily basis** for research and/or to book appointments

# Mobile is a constant research companion



# Patient behavior differs across search and sites

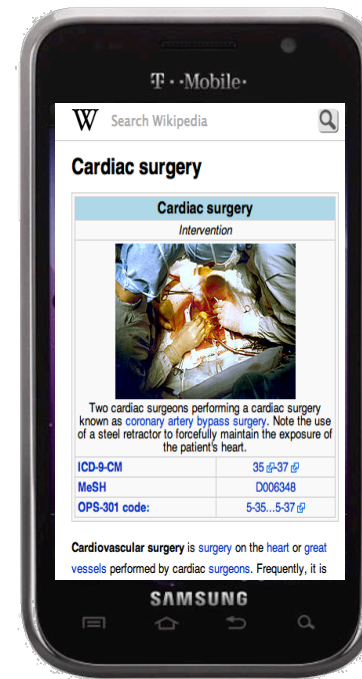
Mobile **search** used to:



Compare offerings across facilities (26%)

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

Mobile **sites** used to:

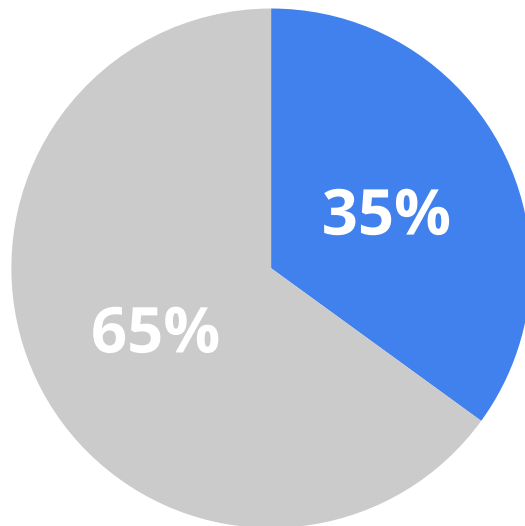


Read reviews of facilities (29%)

Locate a facility for treatment (27%)

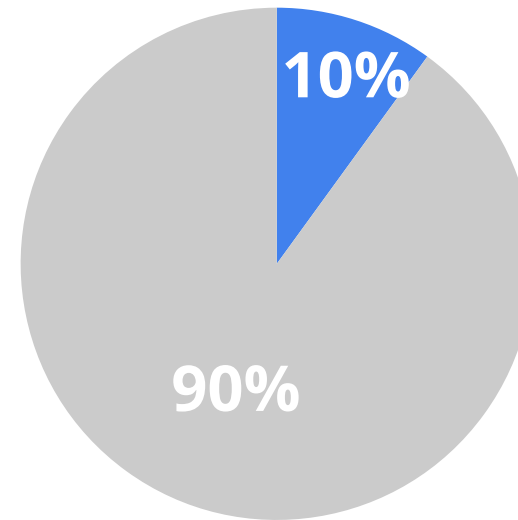
Patients who used a mobile device to research watch online videos in greater numbers

### Mobile Device Researchers



■ Yes ■ No

### Computer Only Researchers



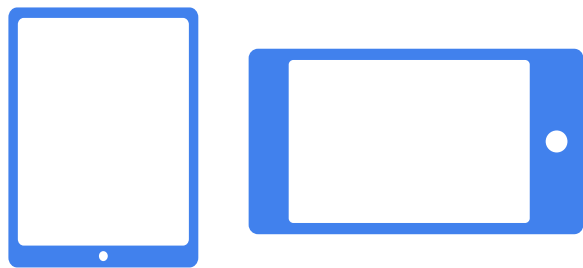
■ Yes ■ No

... 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%)

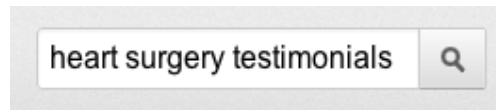
Health Information Sites (30%)

YouTube (29%)

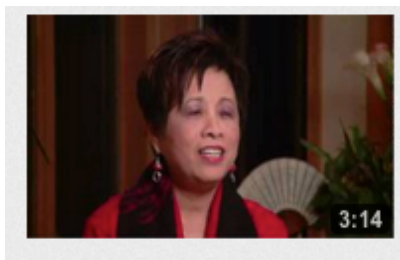
Health Insurance Company Sites (20%)

**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

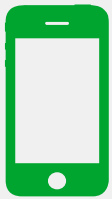


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## Next questions to answer as a hospital marketer



Have you covered all search paths?

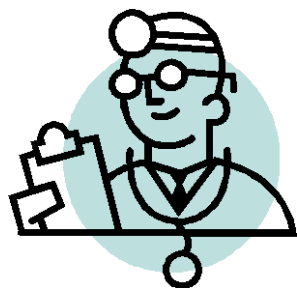
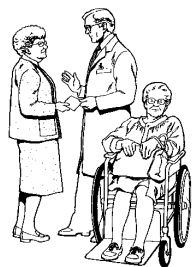


Do you have a mobile strategy?



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](#)