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

Source: 2012 Google/Compete Hospital Study
The Patient Journey

Recovery

Symptoms

Diagnosis

Treatment

Source: 2012 Google/Compete Hospital Study
We sought to understand what influences hospital choice and what role **digital** plays in the journey.

Source: 2012 Google/Compete Hospital Study
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.

Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study
Brand is important to prospective patients

- Reputation of facility: 94%
- Accepts healthcare plan: 90%
- Recommended by physician: 86%
- Uses latest technology: 85%
- Recommended by friends and family: 51%

Source: 2012 Google/Compete Hospital Study
Online plays a significant role in the research process

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

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<tr>
<th>Source: 2012 Google/Compete Hospital Study</th>
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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

Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study
After appointments, patients are spreading the word about their experiences

- **50%** recommended family, friends, and colleagues contact the same facility
- **12%** posted a review on a social network site
- **6%** posted a review on a website

Source: 2012 Google/Compete Hospital Study
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Source: 2012 Google/Compete Hospital Study
77% of patients used search prior to booking an appointment

Source: 2012 Google/Compete Hospital Study
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%)

Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study
Search paths are highly diverse and comprised primarily of symptoms and conditions terms

- Symptoms or departments: 38% (e.g. sore throat, pediatrics)
- Conditions or diseases: 37% (e.g. arthritis, cancer)
- Branded (e.g. [hospital branded term]): 19%
- Treatments or procedures: 6% (e.g. chemotherapy, dialysis)

Source: 2012 Google/Compete Hospital Study
Most paths begin with a non-branded term, when patients are in the early stages of research.

Share of patients that started on:

- Branded: 10%
- Conditions/Diseases: 49%
- Treatments/Procedures: 6%
- Symptoms/Dept.: 35%

Source: 2012 Google/Compete Hospital Study
Search paths continue primarily on non-branded terms towards the moment of conversion.

Source: 2012 Google/Compete Hospital Study
Nearly half of patients finish their paths with a branded term

Source: 2012 Google/Compete Hospital Study
Patients who booked appointments conducted 3x as many searches than those who didn’t

Source: 2012 Google/Compete Hospital Study
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Source: 2012 Google/Compete Hospital Study
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

*Source: 2012 Google/Compete Hospital Study*
Mobile is a constant research companion

- **61%** While at home
- **27%** While at work
- **20%** While out of town
- **23%** While visiting friend or family at home
- **16%** While in a doctor’s office

Source: 2012 Google/Compete Hospital Study
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%)

Source: 2012 Google/Compete Hospital Study
Patients who used a mobile device to research watch online videos in greater numbers

**Mobile Device Researchers**
- Yes: 35%
- No: 65%

**Computer Only Researchers**
- Yes: 10%
- No: 90%

Source: 2012 Google/Compete Hospital Study
... and are also more likely to schedule an appointment

**Mobile Device Researchers**

44%  
Scheduled an appointment

**Computer Only Researchers**

34%  
Scheduled an appointment

Source: 2012 Google/Compete Hospital Study
Prospective patients tell us digital matters

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Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study
Patients seek video reviews and testimonials to learn about hospitals and treatment options

What they watch
43% Patient testimonials
32% Patient-generated content

Why they watch
64% Obtain information about hospitals
56% Understand complicated treatments and procedures

Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study
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.

Source: 2012 Google/Compete Hospital Study
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Source: 2012 Google/Compete Hospital Study
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?

Source: 2012 Google/Compete Hospital Study
Appendix
Methodology: Hospital Industry Definitions

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<thead>
<tr>
<th>Brands</th>
<th>Conversions</th>
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<tr>
<td>Allina</td>
<td>Schedule/Request Appointment</td>
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<td>Aurora Health Care</td>
<td>Find a Location</td>
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<td>Banner Health Care</td>
<td>Find a Doctor</td>
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<tr>
<td>Baylor Health Care System</td>
<td>Contact Us</td>
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<tr>
<td>Cancer Treatment Centers for America</td>
<td>Refer a Patient</td>
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<td>Cleveland Clinic</td>
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<td>Laser Spine Institute</td>
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<td>St. Jude Children’s Research Hospital</td>
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<td>University of Pittsburg Medical Center</td>
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</table>

Source: 2012 Google/Compete Hospital Study
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

Source: 2012 Google/Compete Hospital Study