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The Impact of Online Behavior on Hospital Choice

Google OTX Custom Hospital Research Study
U.S., 2009

Study Methodology



Vendor: OTX: Online Testing Exchange

Survey field dates: April 29, 2009 – May 3, 2009

Number of Interviews: 1,000 completes from of an online survey, which includes a 50/50 split of patients and caregivers.

In order to qualify for the survey, a respondent had to:

- Reside in the United States
- Be 18 – 55 years old
- Been admitted* or cared for someone** who has been to the hospital within the past year or plan on being admitted* or care for someone** who plans to stay overnight within the next year
- Search for hospital related information online in the past 12 months.

* Defined as Patient, n=500. ** Defined as Caregiver, n=500.

Key Findings

- 1** There is a large opportunity to engage hospital information seekers online

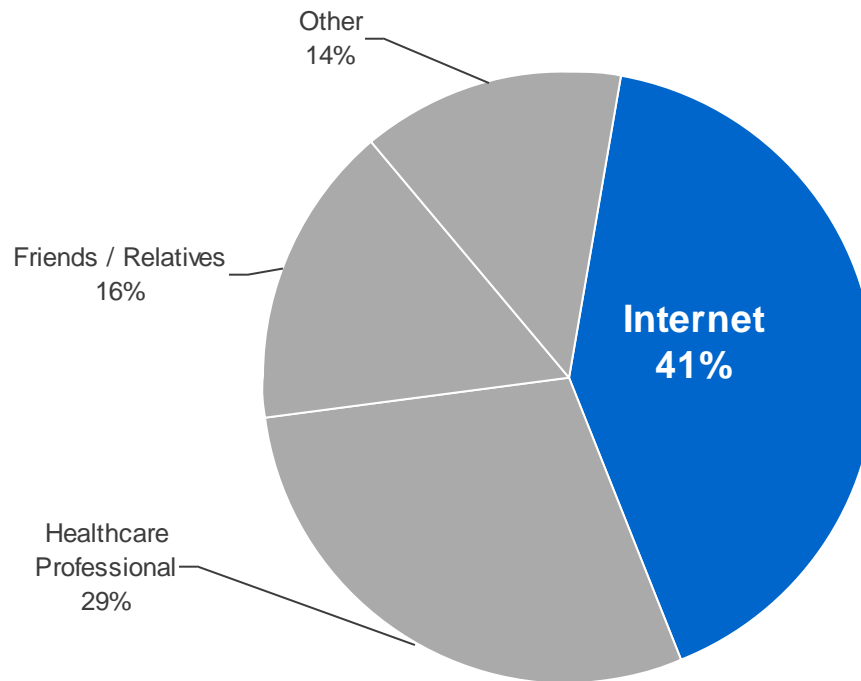
- 2** People are more likely to consult the Internet before turning to family, friends, or even a healthcare professional

- 3** Next to hospital websites, search engines are the most utilized source of online information about hospitals

- 4** Online hospital searches prompt action and the Internet has a direct impact on the health and well being of consumers

Consumers Turn to Internet First

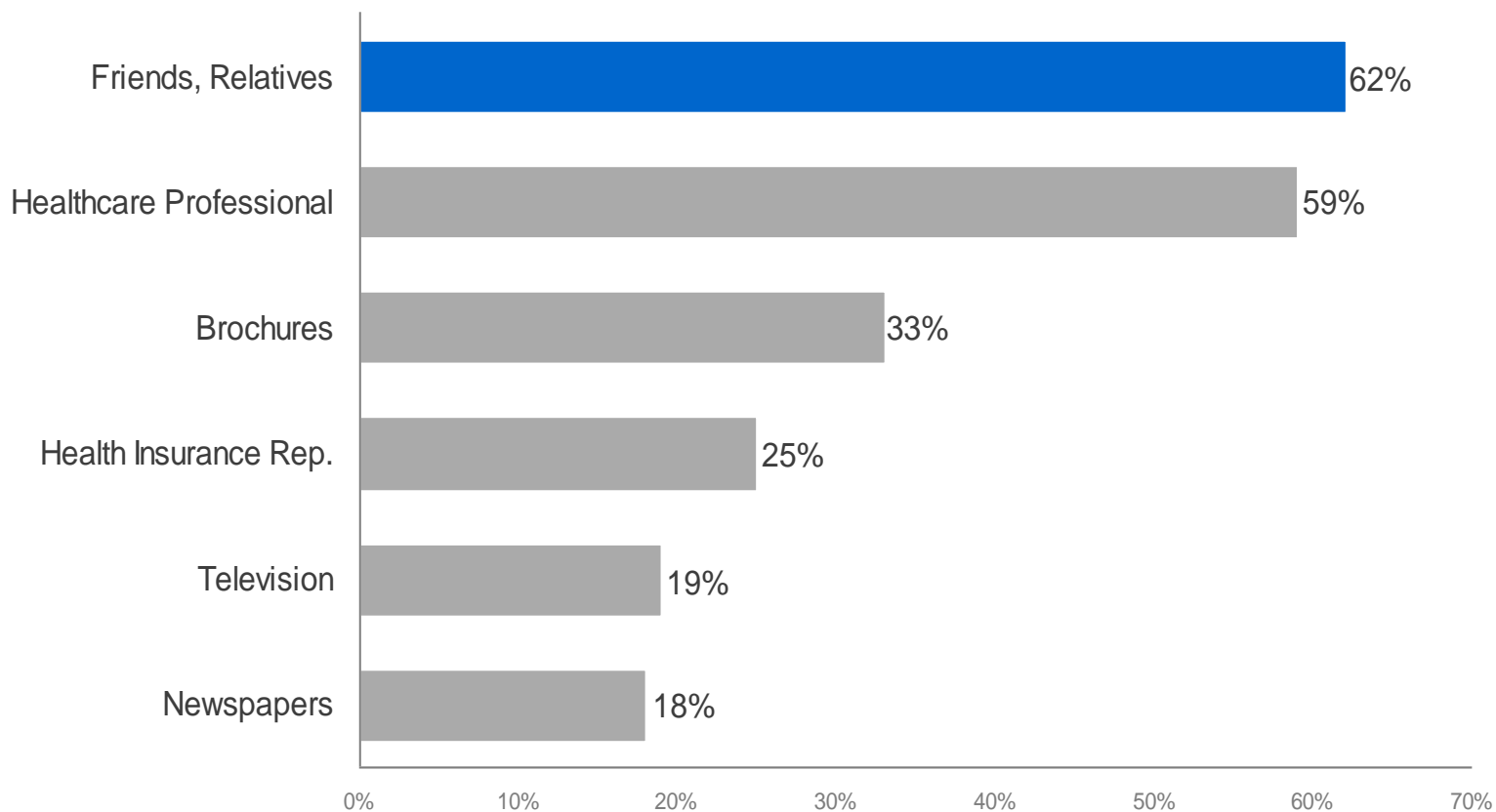
First Source Used to Research Hospitals



Question: Which of the following sources do you refer to first when looking for information on hospitals? Based on total: Total (1000); Sufferers (500); Caregivers (500)
Source: OTX & Google Custom Hospital Study, June 2009

Additional Sources Used to Gather Information

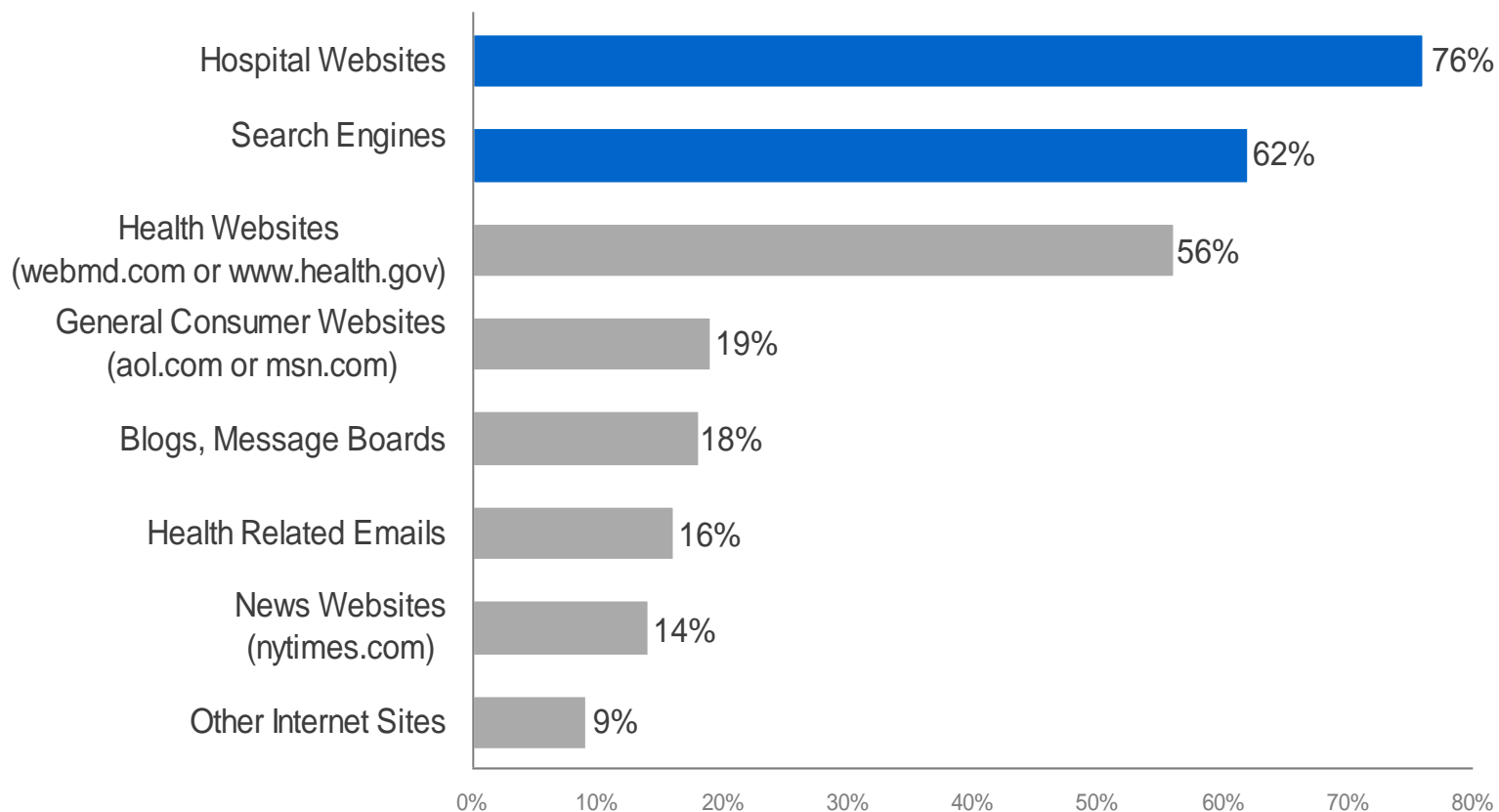
Sources Used in Addition to the Internet



Questions: You mentioned earlier that you have used the internet to research hospitals pertaining to yourself or someone you care for. What other sources, if any, have you used for this type of research? Which of the following sources do you refer to first when looking for information on hospitals? **Based on total: Total (1000); Sufferers (500); Caregivers (500)**
Source: OTX & Google Custom Hospital Study, June 2009.

Majority Use Hospital Websites and Search

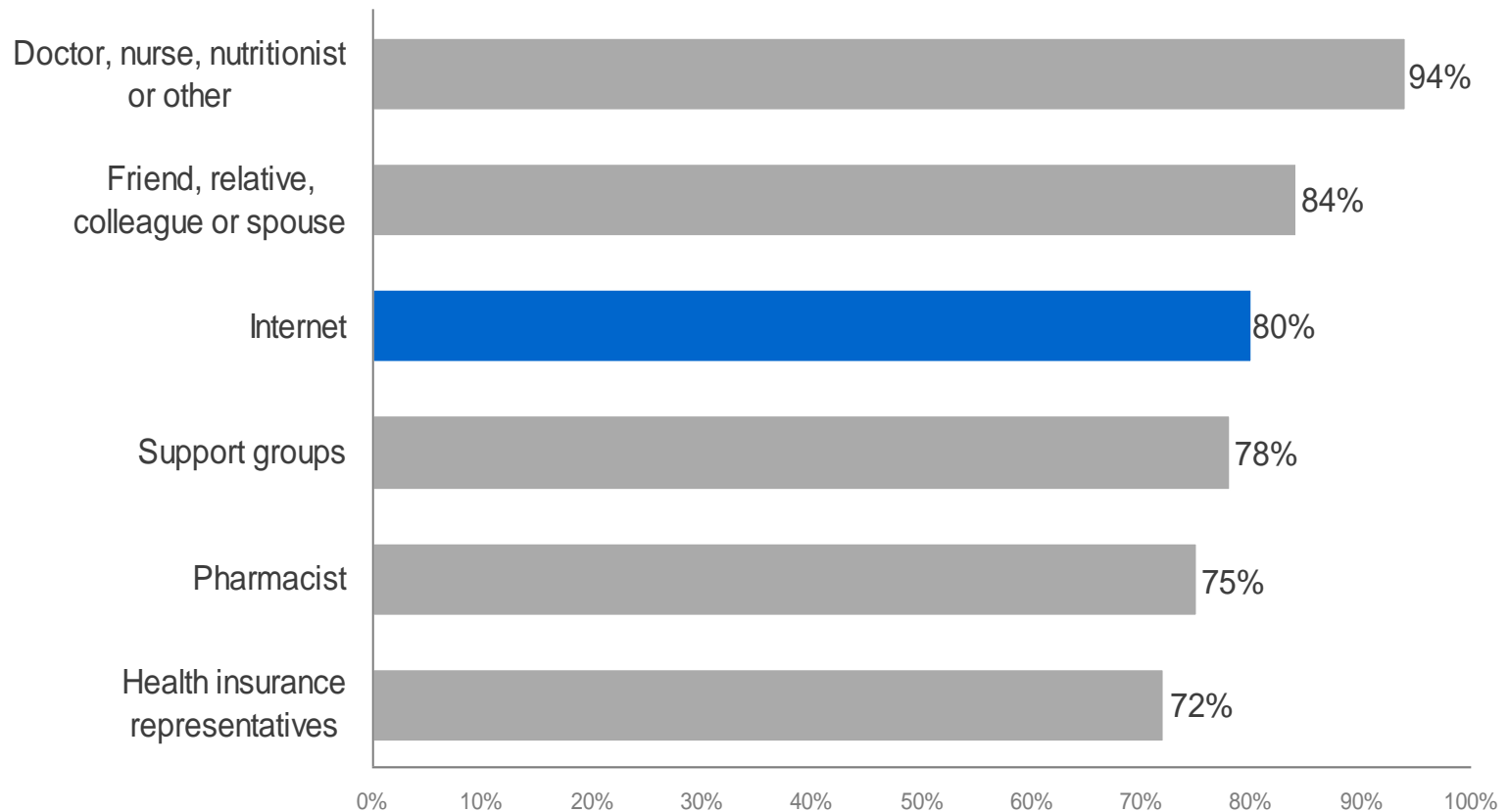
Online Resources Used to Obtain Information on Hospitals



Question: Now thinking specifically about **online** sources, which of the following have you used to obtain information on hospitals? Based on total: Total (1000); Sufferers (500); Caregivers (500)
Source: OTX & Google Custom Hospital Study, June 2009

Next to Speaking to Someone, the Internet Is the Most Useful Source of Information

Usefulness of Source in Hospital Choice Decisions



Question: Based on your experience, how useful are the following sources when choosing a hospital.
Based on those who used the source to research hospitals: Total (66-1000); Sufferers (45-500); Caregivers (16-500)
Top 2 box: Extremely/Very useful
Source: OTX & Google Custom Hospital Study, June 2009.

Patients Look for Condition, Facility and Staff Information

Reasons for Conducting Online Research

Condition Information



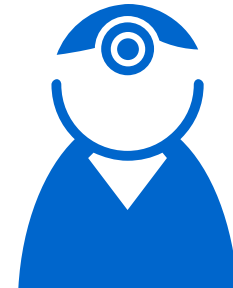
- To learn more about conditions
- To find out how you treat a condition

Facility Information



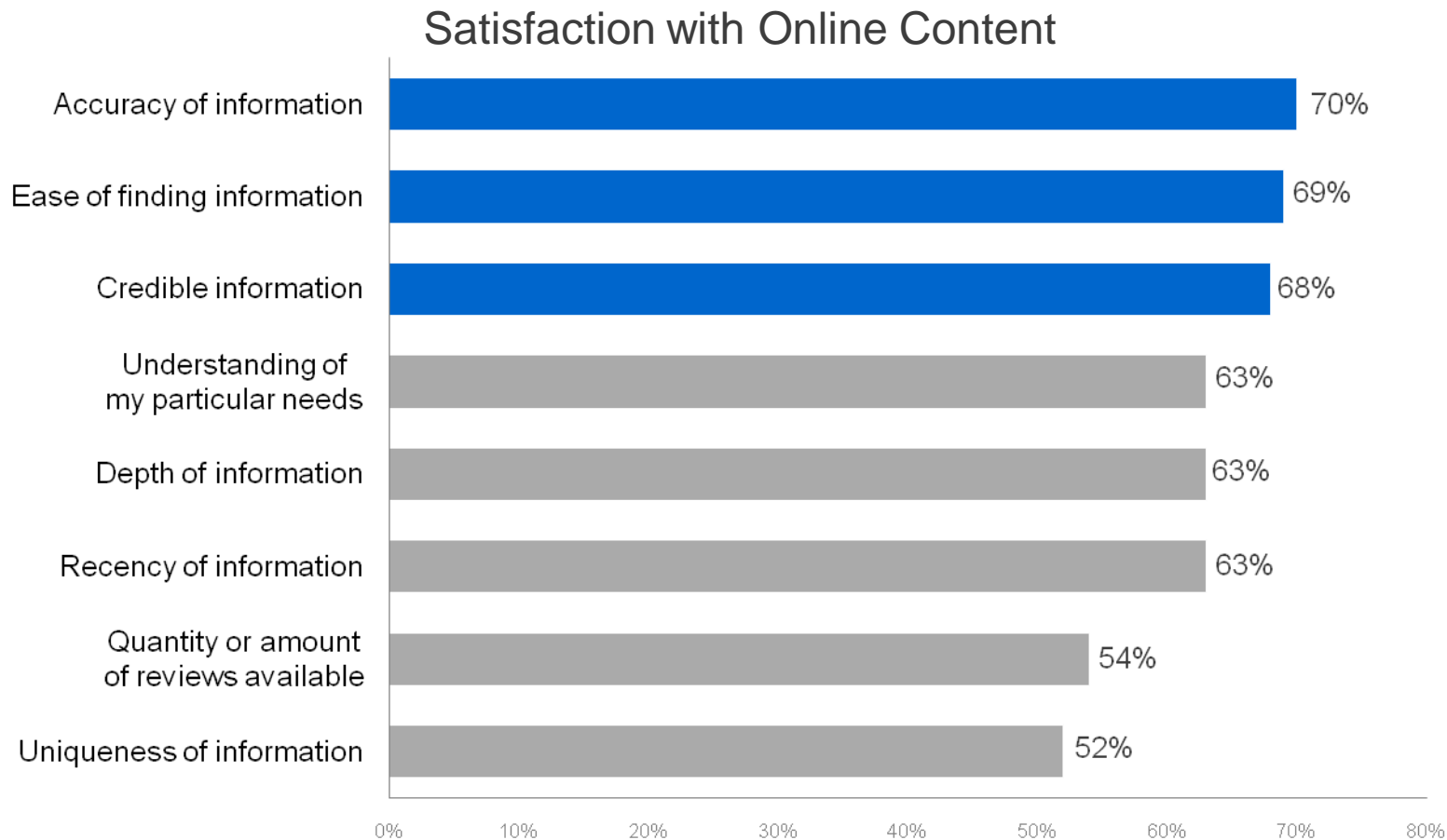
- To find a hospital that specializes in a condition/treatment
- To compare facilities
- To research a facility recommended by a doctor
- To determine the convenience of a facility
- To research a facility seen from an ad
- To find info on a clinical trial

Medical & Admin Staff Info



- To learn about a facility a physician is associated with
- To get information on a facility's staff

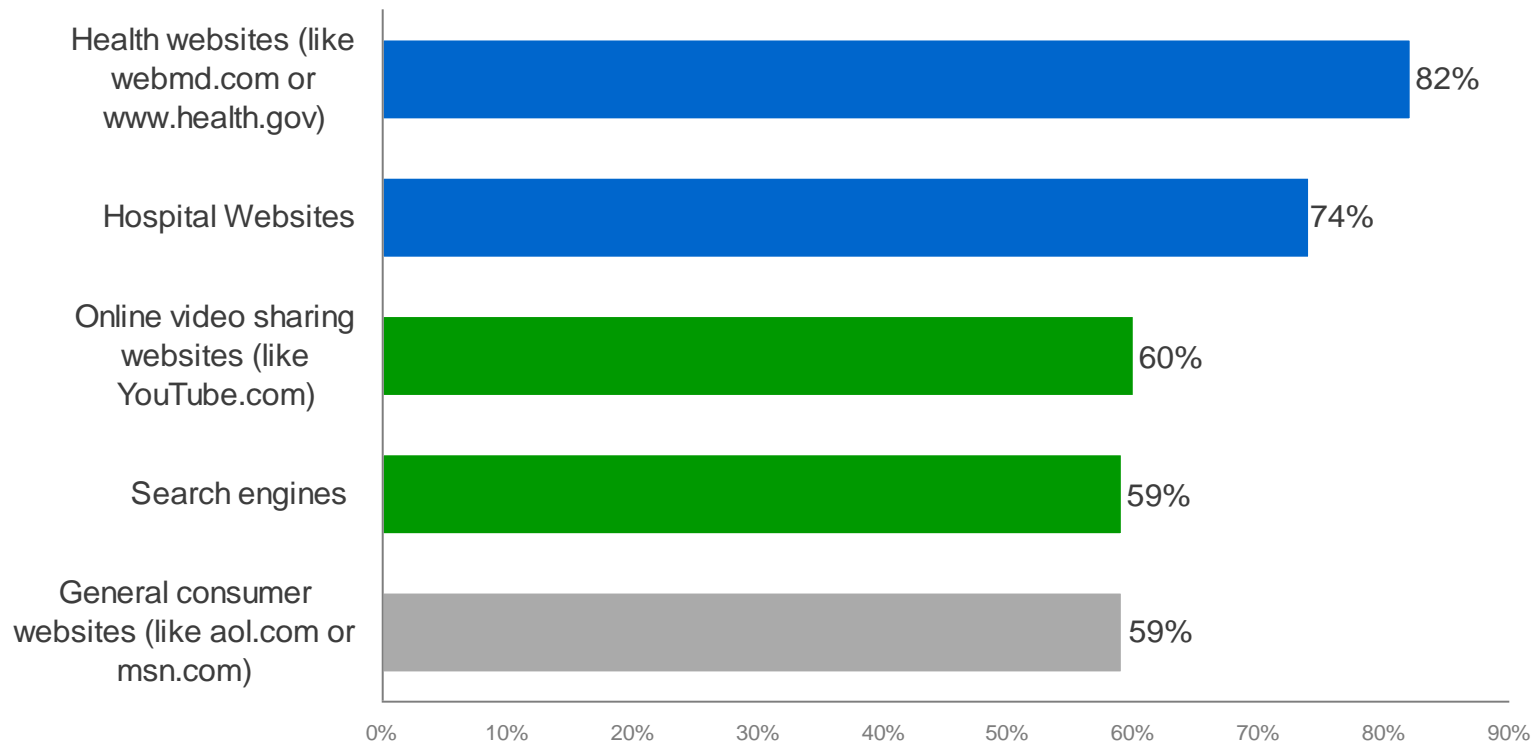
Hospital Info Seekers Are Most Satisfied with Accuracy, Ease, & Credibility



Question: When it comes to researching hospitals online, how satisfied are you with the following?
Based on those who used source to find information on hospitals: Total (62-759); Sufferers (36-367); Caregivers (19-392)
Top 2 box: Extremely/Very Satisfied
Source: OTX & Google Custom Hospital Study, June 2009.

Search Engines Are Highly Trusted by Nearly Two-Thirds of Hospital Info Seekers

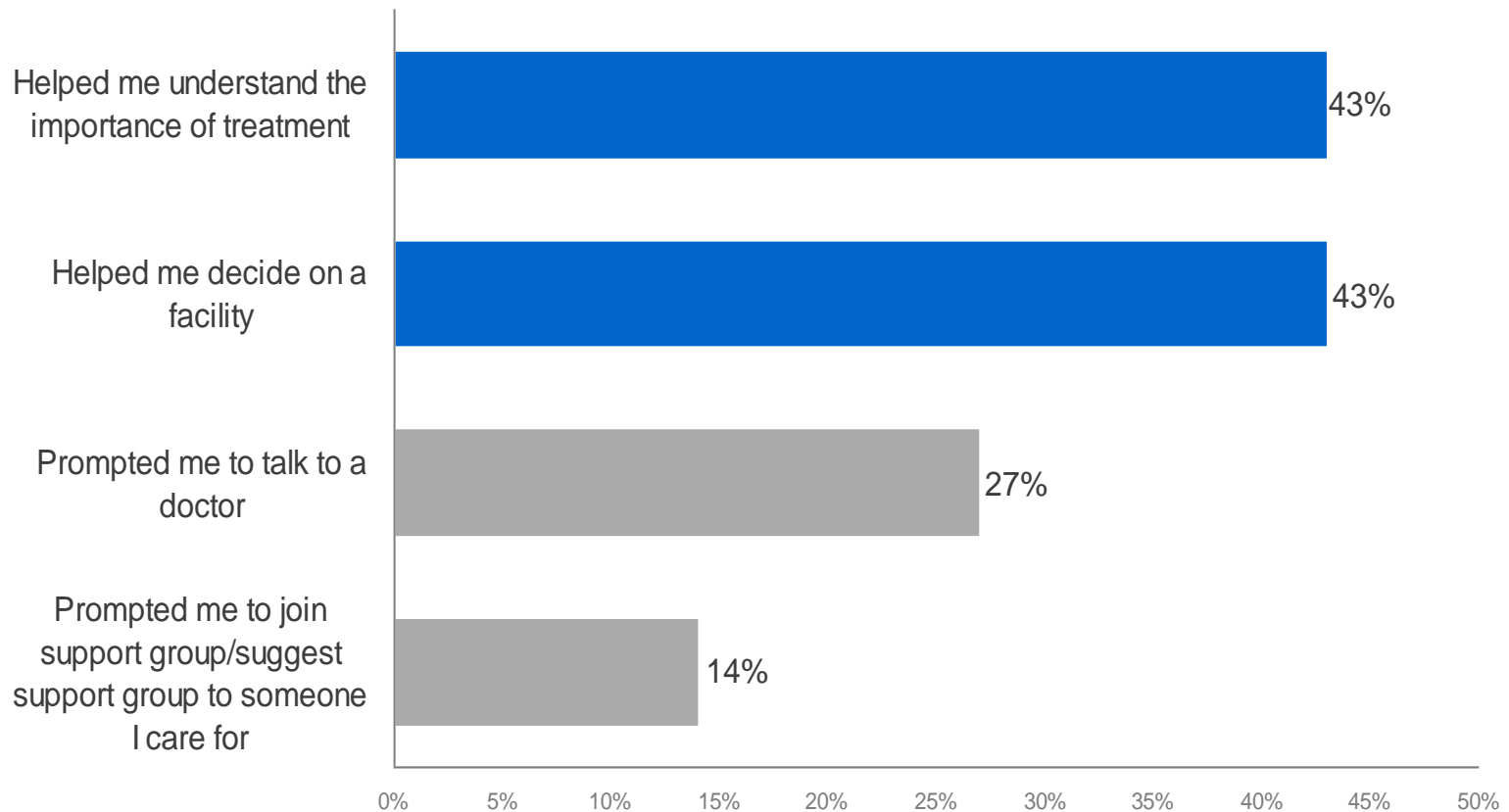
Most Trusted Online Sources of Hospital Info



Question: How much do you trust the following online sources?
Based on total: Total (1000); Sufferers (500); Caregivers (500)
Source: OTX & Google Custom Hospital Study, June 2009.

Internet Educates and Helps in Decision Choice

How the Internet Helped in Choice Decision



Question: Specifically, how have the following sources helped as you looked for information on hospitals?
Based on Internet users
Source: OTX & Google Custom Hospital Study, June 2009.

Internet Helps in Facility Choice

Sources That Helped Guide Facility Choice



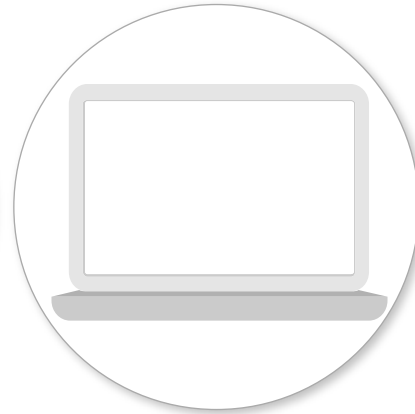
53%

Doctor, nurse,
nutritionist or other
healthcare
professional



34%

Informational
brochures or
pamphlets



43%

Internet



50%

Friend, relative,
colleague or
spouse

Question: Specifically, how have the following sources helped you as you looked for information on hospitals?
Based on total: Total (1000); Sufferers (500); Caregivers (500)
Source: OTX & Google Custom Hospital Study, June 2009.

Actions Taken as a Result of an Online Search

85% of People Take Action Offline

66% of People Take Action Online

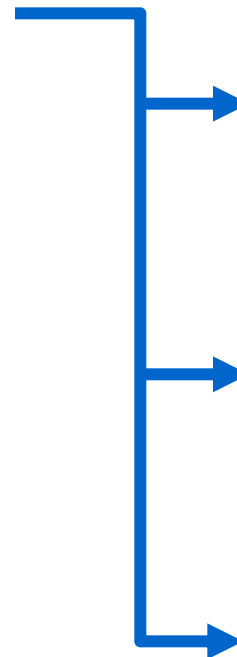


Question: Which of the following have you ever done as a result of conducting an online search on hospitals?
Based on total: Total (1000); Sufferers (500); Caregivers (500)
Source: OTX & Google Custom Hospital Study, June 2009.

Online Searches for Hospitals Have Higher Recall Rates than all Other Mediums

Advertising Recall

	Total
Online Media (Net)	43%
TV ad	32%
Informational brochures or pamphlets	28%
Newspaper ad	18%
Magazine ad	14%
Billboard ad	18%
Radio ad	16%



	Total
Search engine results	33%
Online/Website ad (banner ad or pop-up), but not a video ad	16%
Online video ad (with video and audio qualities similar to a TV ad, but seen on a website)	8%

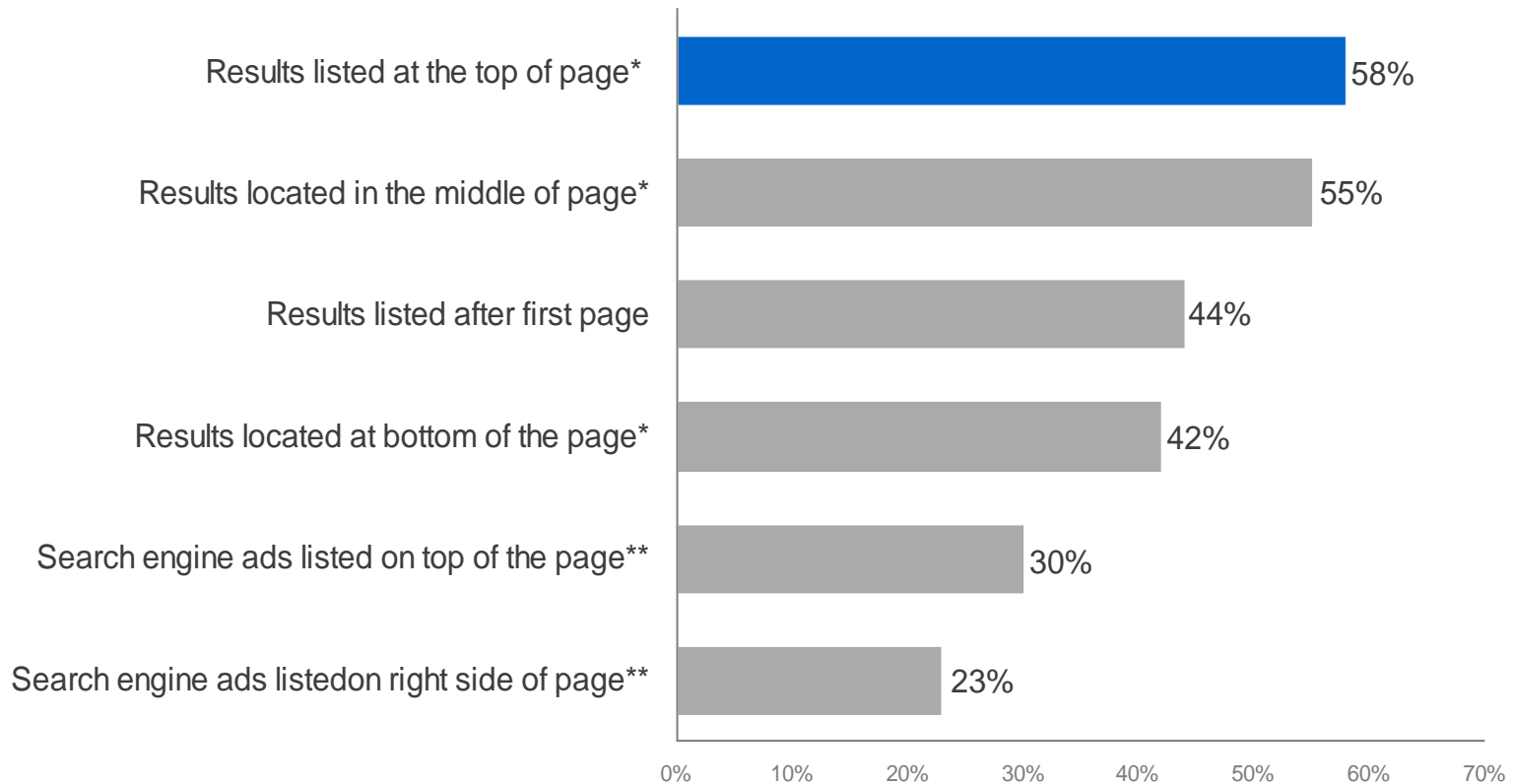
Advertising Recall Leads Consumers to Take Action

Actions Taken Based on Advertising Recall	Total
Looked online for more information about a hospital	43%
Asked a medical professional about a hospital	38%
Asked a friend or family member about a hospital	38%
Thought more favorably about a hospital	30%
Called a hospital	26%
Visited a hospital	23%
Requested more information be mailed to you	21%
Recommended a website to someone else	18%
Called a toll-free or 800 number	15%
Considered using a hospital based on the search result	15%
Booked an appointment or stay online	10%
Switched hospitals	10%
Clicked on an ad for a specific facility, treatment option, etc	7%
Forwarded a link or video	5%

Question: And, which of the following, if any, have you taken as a result of seeing or hearing advertising for hospitals? Based on those who recall seeing advertising for hospitals: Total (746); Sufferers (377); Caregivers (369)
Source: OTX & Google Custom Hospital Study, June 2009.

Nearly One-Third of Hospital Info Seekers Click on Ads to Get More Info

Likelihood to Click on Search Engine Results



*Not "labeled", "sponsored" or "paid". **Usually labeled or identified as "sponsored" or "paid" listings

Question: While researching hospitals on a search engine such as Google or Yahoo!, how likely are you to click on the following?

Base: Find search engines useful Total n=966; Sufferers n=485; Caretakers n=481

Top 2 box: Extremely/Very Likely

Source: OTX & Google Custom Hospital Study, June 2009.



Conclusions & Recommendations

Google OTX Custom Hospital Research Study
August 2009

Conclusions & Recommendations

Conclusions

The Internet is often the primary and useful source to find information on hospitals

Hospital info seekers begin their research using search and surfing the web

Online research leads to higher ad recall and impacts health decisions

Recommendations

Syndicate and distribute messages across the web to reach hospital info seekers as they search for and/or browse for information

Ensure your campaigns are set up to capture your target audience

Diversify your marketing mix through multiple channels

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