



The Digital Journey to Recovery

Treatment Center Study

Google/Compete, U.S.
September 2012

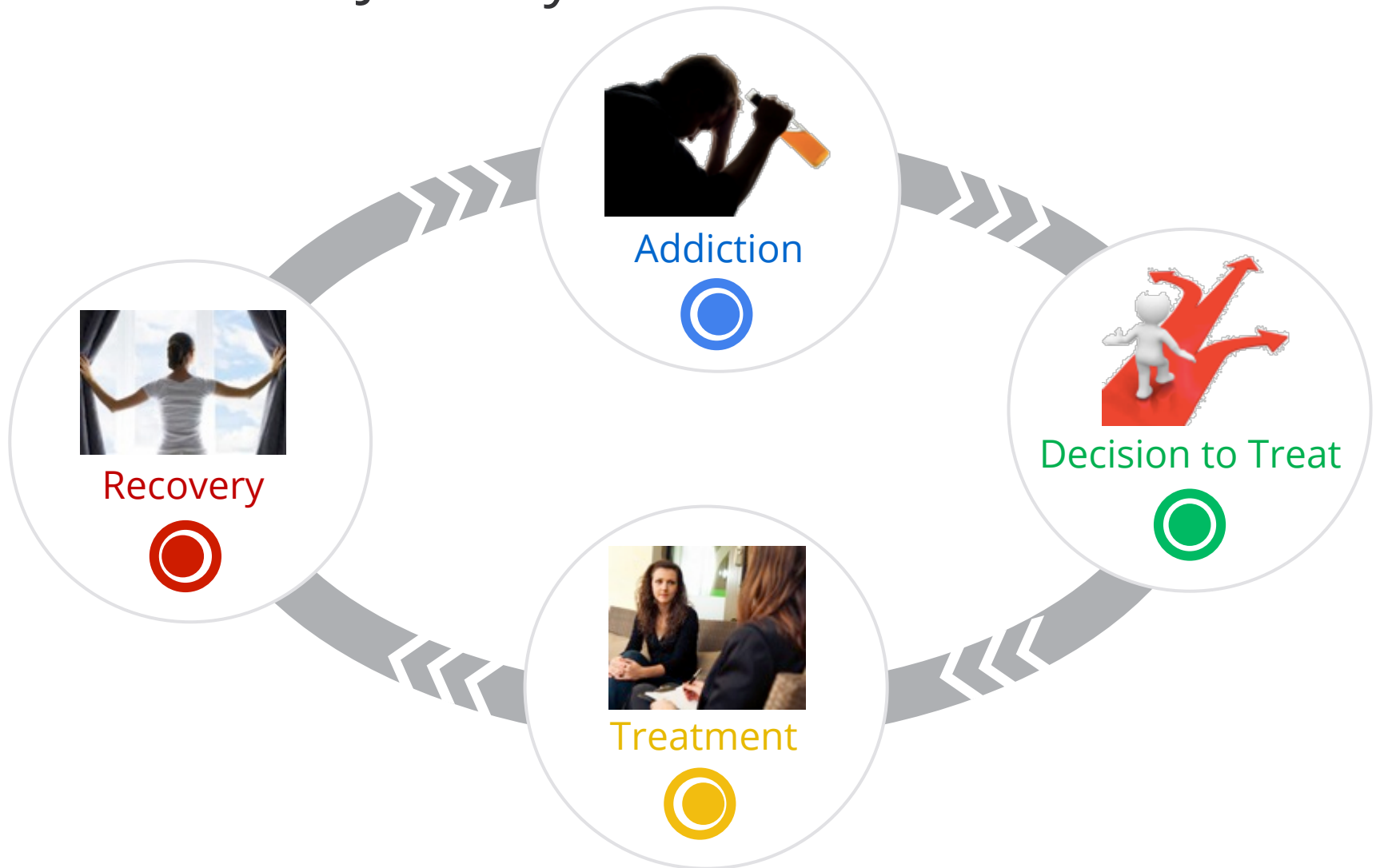
In today's digital world,
prospective patients are now

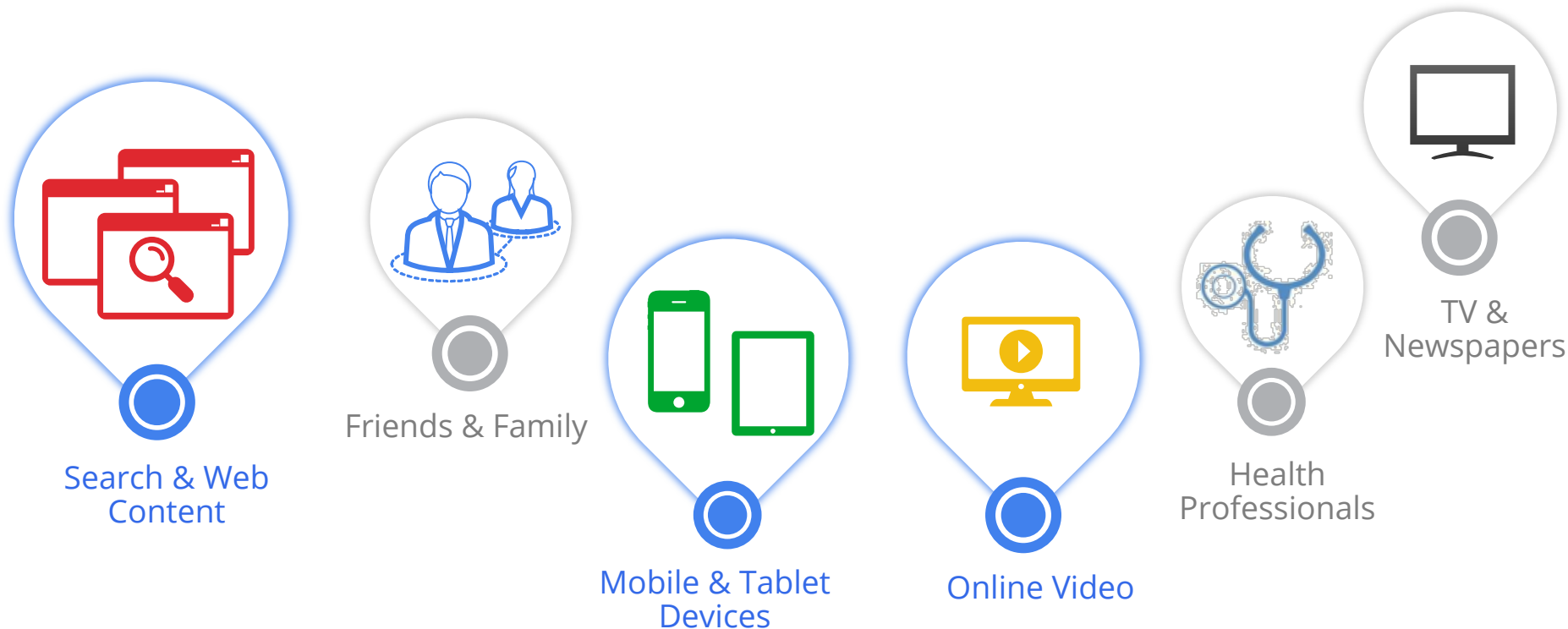
ACTIVE PARTNERS

in their medical journeys



The Patient Journey





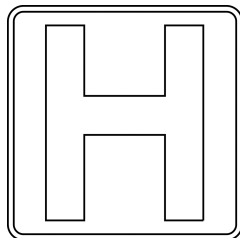
We sought to understand what influences treatment center choice and what role **digital** plays in the journey

Overview and Methodology

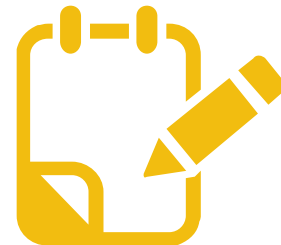
We partnered with **Compete**, a third-party research vendor, to understand how digital drives treatment center research and appointments



We **tracked** users' research 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** 267 treatment center researchers in May and June 2012 to gain behavioral insights

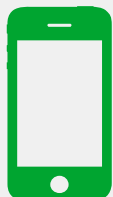
*A **conversion** was defined as the following: Live Chat, Find A Location, Tour Facility

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

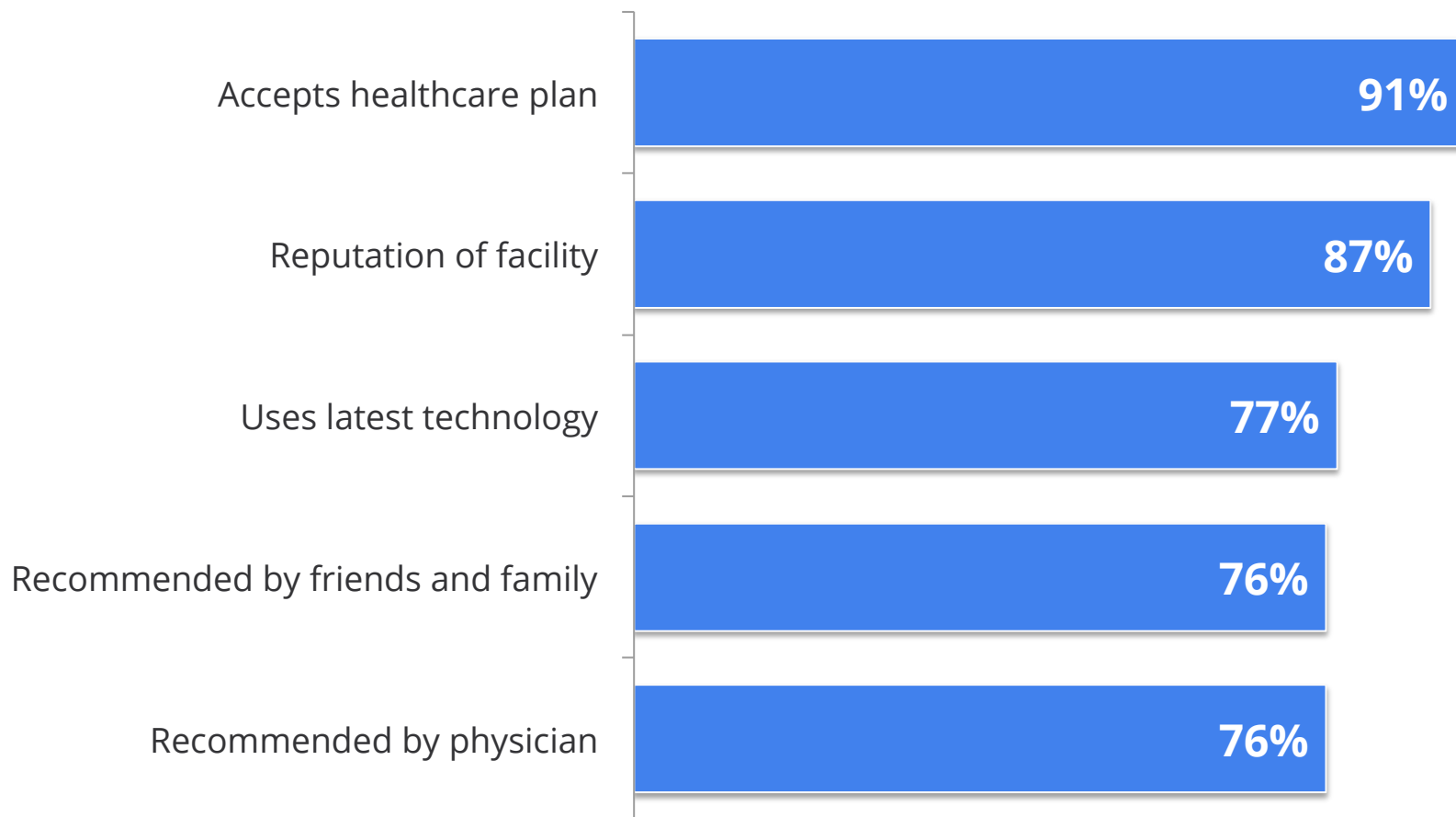


Online Video informs and connects

Sight, sound, and motion tell stories & fuel conversions

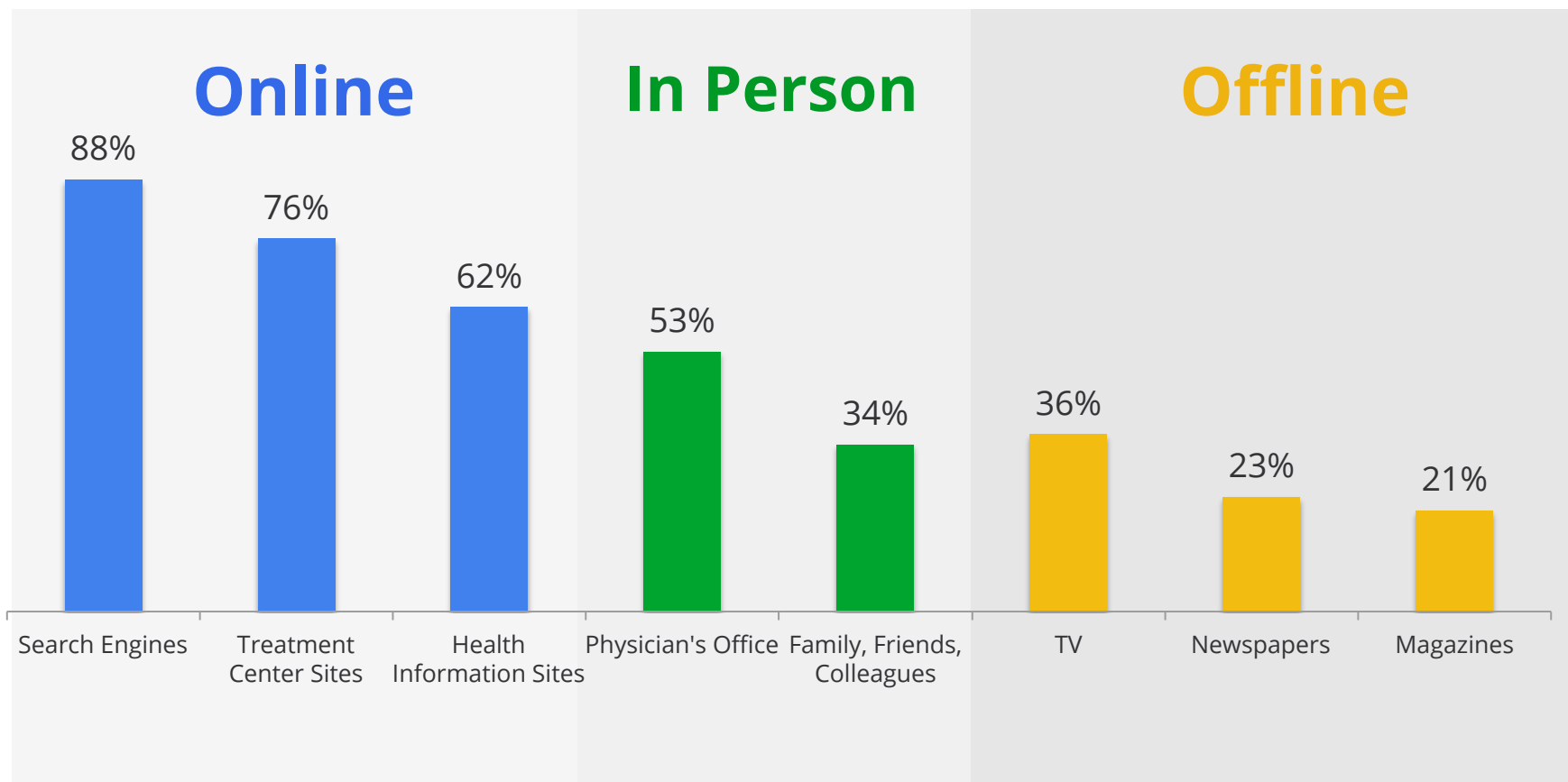
What users look for in a treatment center

Marketing can influence top patient priorities



Online plays a significant role in the research process

86% of patients used both online and offline resources



Before scheduling an appointment, users put time and consideration into their research

41%

took **>2 weeks** to
research before
scheduling an appt.

53%

visited **2+ treatment
center websites**
before converting



For users who booked an appointment, digital content is key to decision-making

Users tapped into the following resources when researching:



73%

Treatment
Center Sites



66%

Health Insurance
Company Sites



55%

Health Information
Sites



37%

Consumer
Generated Reviews

After a stay with a treatment center, people are spreading the word

49%

recommended family,
friends, and colleagues
contact the same facility

16%

posted review on social
network site

19%

posted a review on a
website

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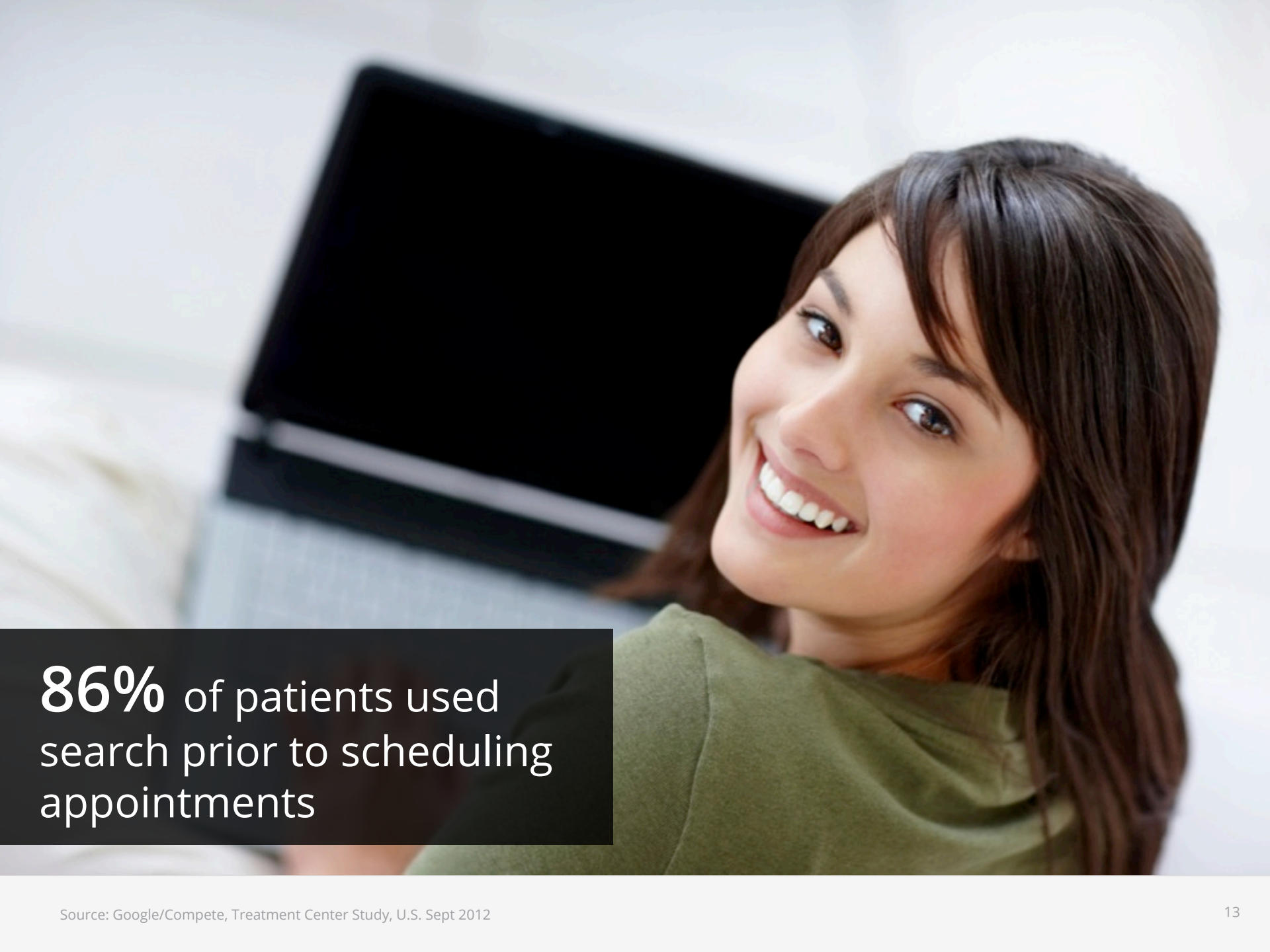
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A young woman with long, dark, wavy hair is smiling and looking towards a laptop screen. She is wearing a green top. The laptop is open and its screen is dark. The background is a plain, light-colored wall.

86% of patients used
search prior to scheduling
appointments

Search empowers patients, who leverage it for...

DISCOVERY OF NEW BRANDS (34%)

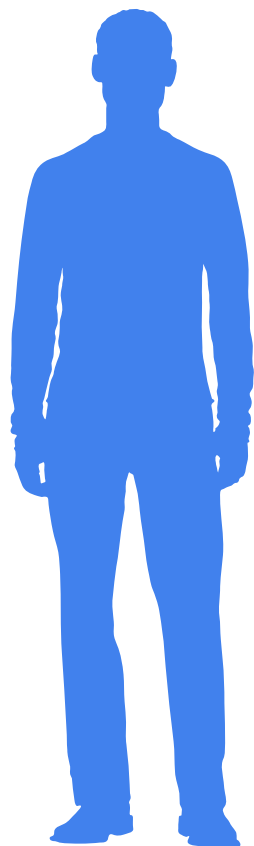
EVALUATION OF SPECIFIC FEATURES (32%)

GENERAL INFORMATION (57%)

COMPARISON OF OFFERINGS ACROSS FACILITIES (31%)

CONSIDERATION OF BRANDS THEY KNOW (27%)

Search drives valuable visitors, who are twice as likely to convert, to treatment center sites



Searchers

113K
unique visits

17.7%
conversion rate

20K
conversions



Non-Searchers

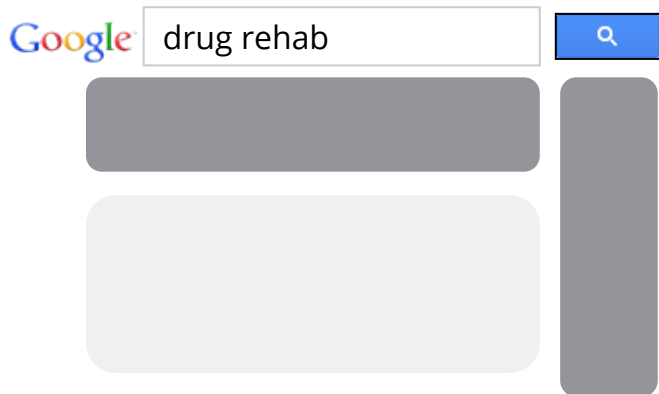
35K
unique visits

9.0%
conversion rate

3K
conversions

When patients see a paid search ad, they take action

After seeing a paid ad, users....



26%

Conduct searches for more information

38%

Begin the research process

39%

Visit website of treatment center advertised

36%

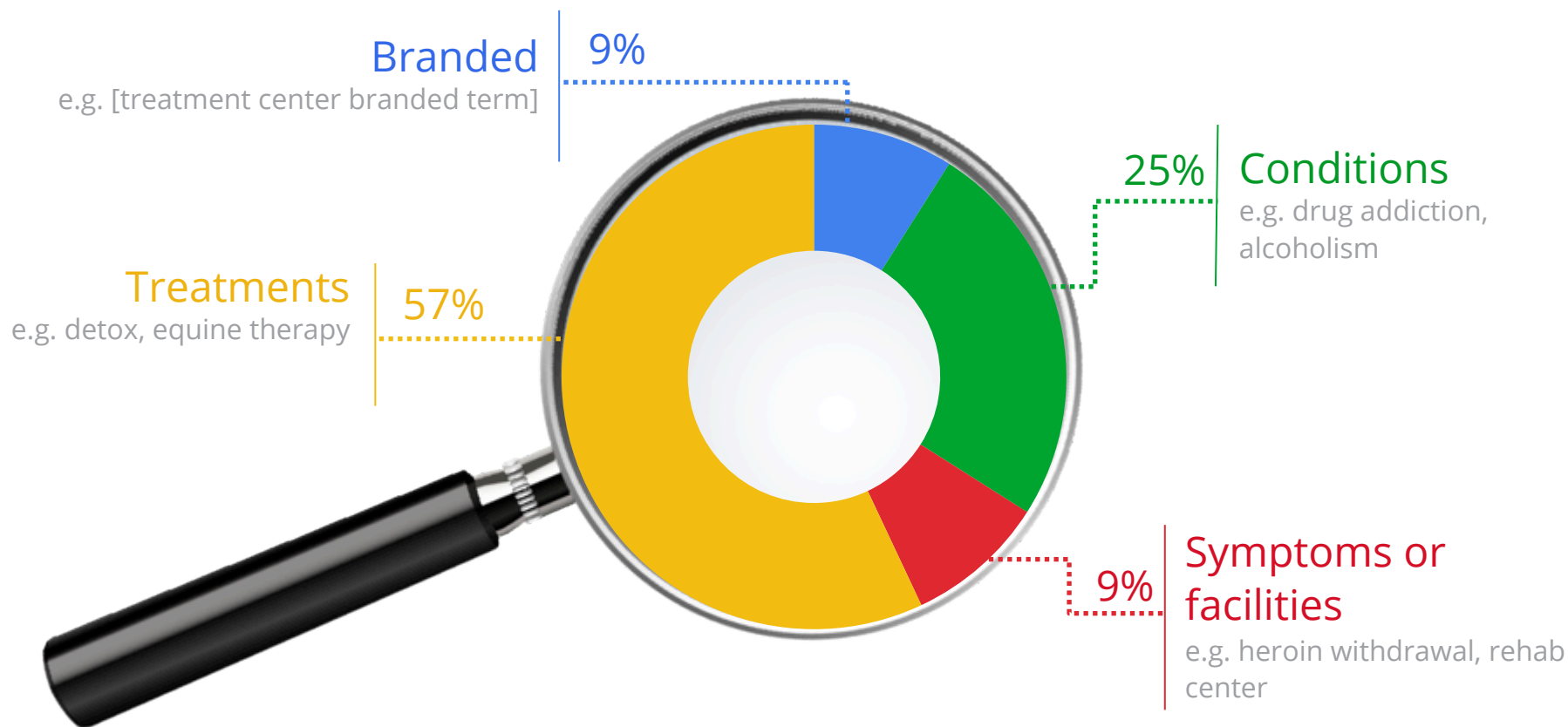
Consider treatment center that was advertised

Each patient creates a unique search path



Researchers used over
150 unique search paths,
with the top 20 paths
representing
49% of treatment center
patients

Search paths are highly diverse and comprised primarily of treatment and condition terms



Non-branded terms are central to treatment center converters' path to wellness

Share of patients that started on:

10%

27%

28%

35%

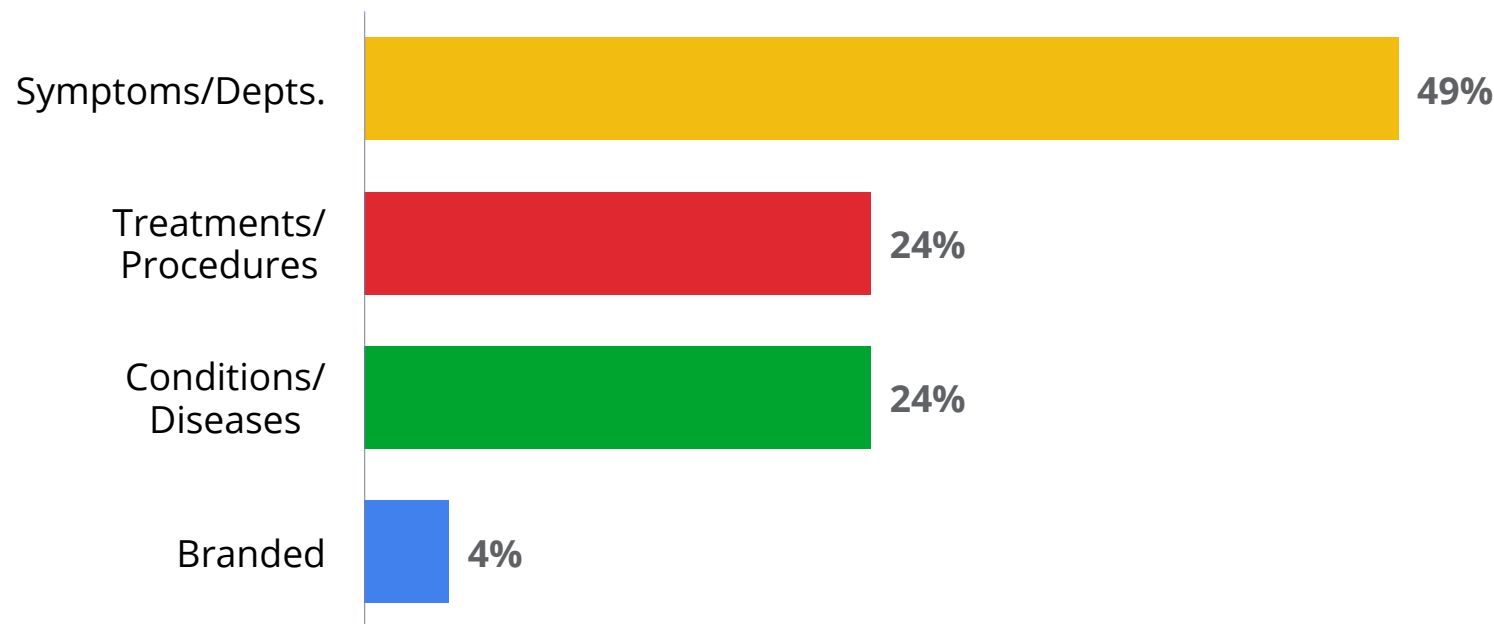
Branded

Condition/
Diseases

Treatments/
Procedures

Symptoms/
Dept.

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



Most converters finish their paths with a non-branded term

Share of patients that finished on:

11%

26%

32%

31%

Branded

Conditions/
Diseases

Treatments/
Procedures

Symptoms/
Dept.

Share of patients that started on:

10%

27%

28%

35%

Branded

Conditions/
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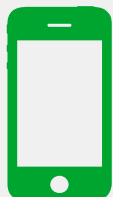
Patients who converted conducted over 3x as many searches than those who didn't



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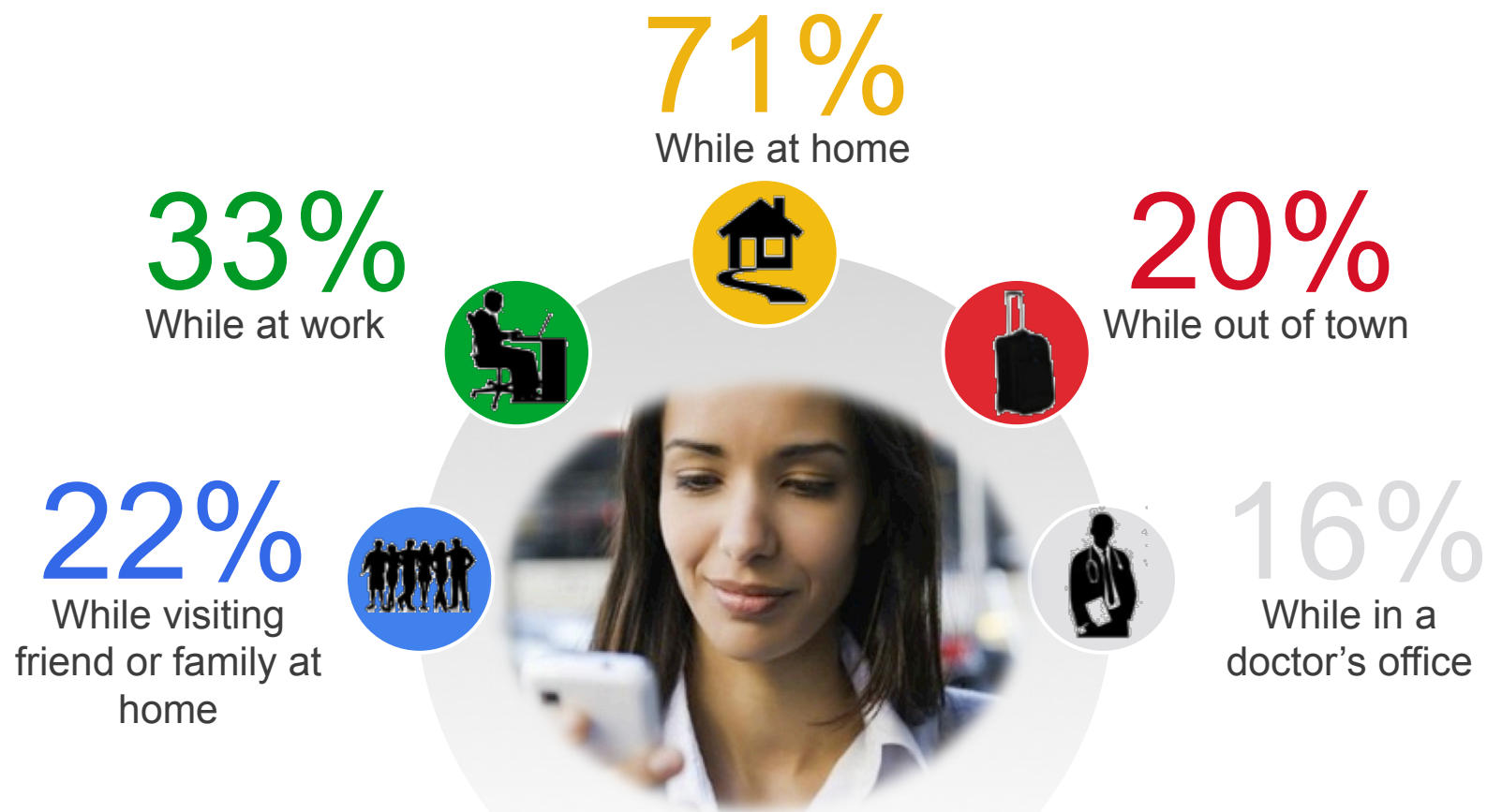


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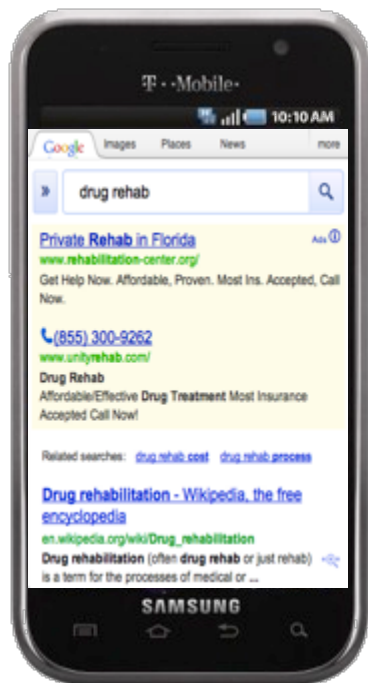
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Mobile is a constant research companion



Mobile utilized across search and sites

Mobile **search** used to:



Discover brands I wasn't aware of (22%)

Compare costs across facilities (14%)

Mobile **sites** used to:

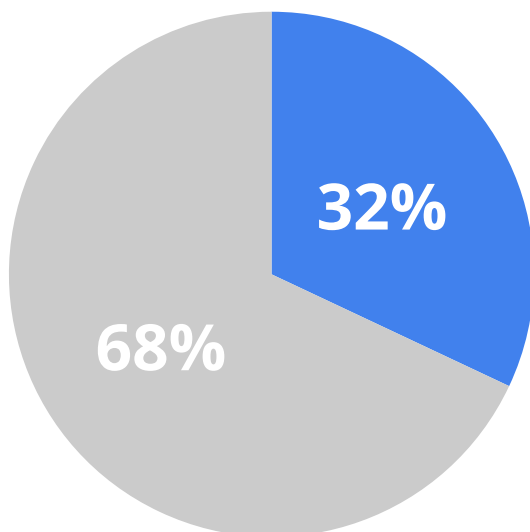


Read reviews of facilities (49%)

Compare facility features (32%)

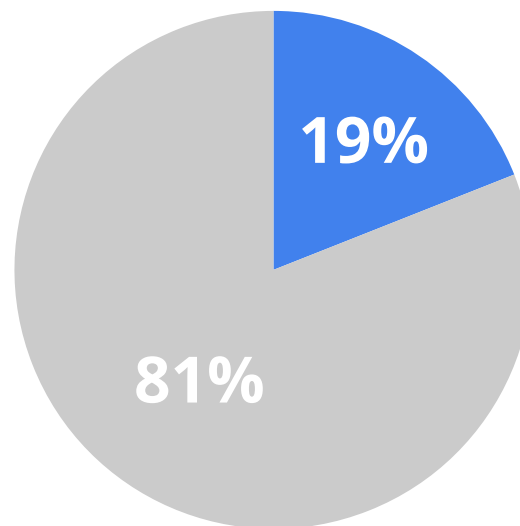
Patients who used a mobile device to research watch online videos in greater numbers

Mobile Device Researchers



■ Yes ■ No

Computer Only Researchers



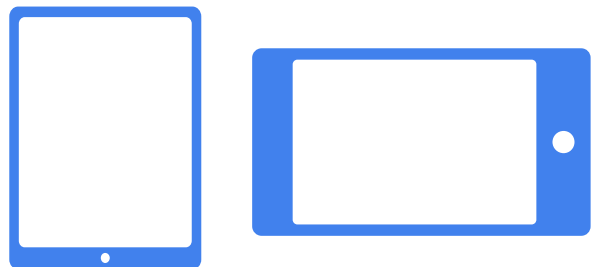
■ Yes ■ No

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

Mobile Device Researchers

33%

Booked an appt.



Computer Only Researchers

15%

Booked an appt.



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Online video is a pivotal component of treatment center research



Almost ¼ patients watched an online video on:

YouTube (45%)

Health Information Sites (44%)

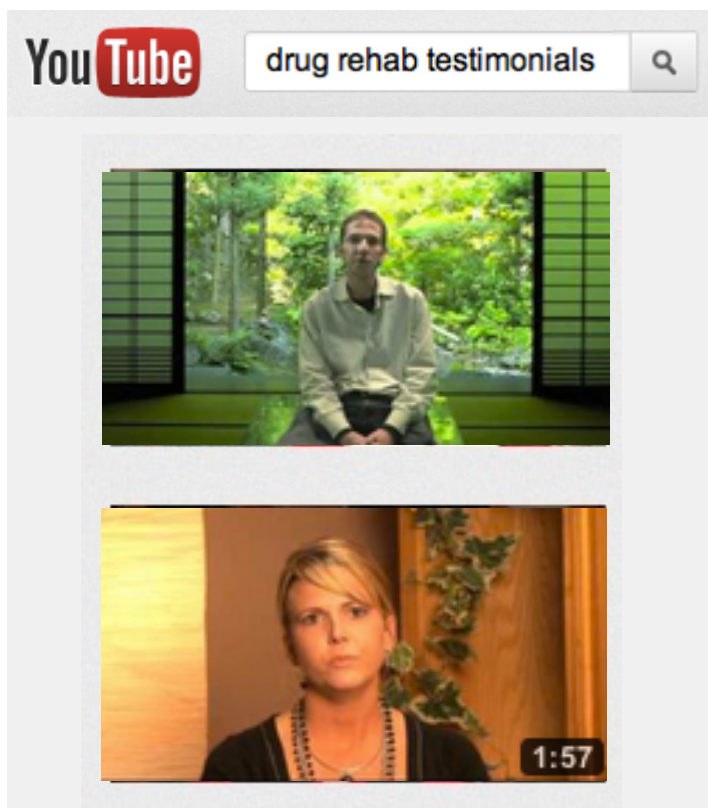
Treatment Center Sites (36%)

Health Insurance Information Sites (32%)

Health Insurance Company Sites (17%)

Over half of patients who didn't watch treatment center videos were unaware they existed

Patients seek video reviews and testimonials to better understand treatment centers and treatment options



What they watched

- 43% Patient testimonials
- 53% Professional reviews

Why they watched

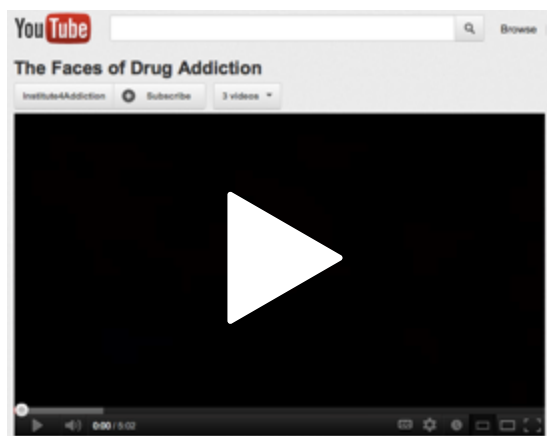
- 44% Obtain general information
- 46% Understand treatments

After watching online videos about a treatment center, consumers...



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

Patients who watch videos are driven to treatment center sites where they are more likely to convert



YouTube traffic to
treatment center
sites has increased
202% YoY



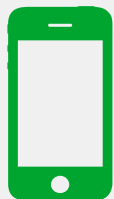
30% of patients who watched an online video booked an appointment

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Online Video is the next big opportunity

Video doesn't just tell a story, it fuels conversions

Next questions to answer as a treatment center marketer



Have you covered all search paths?



Do you have a mobile strategy?



How are you leveraging your online video assets?