This study is brought to you courtesy of

thinkinsights with Google[®]

www.google.com/think/insights

thinkhealth with Google

Online Behaviors of Treatment Center Researchers

Google/OTX U.S., September 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
- Checked in* or cared for someone** who has been to a treatment center within the past year or plan on checking in* or caring for someone** who checks into a treatment center within the next year for drug & alcohol addition or an eating disorder
- Search for treatment center 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 treatment center information seekers online

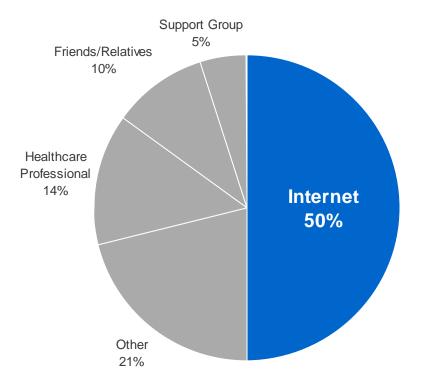
2 People are more likely to consult the Internet before turning to family, friends, or even a healthcare professional

3 Search engines are the most popular online sources for information about treatment centers, followed closely by treatment center & health websites

4 Online treatment center searches prompt action and the Internet has a direct impact on the health and well being of consumers



Consumers Turn to Internet First



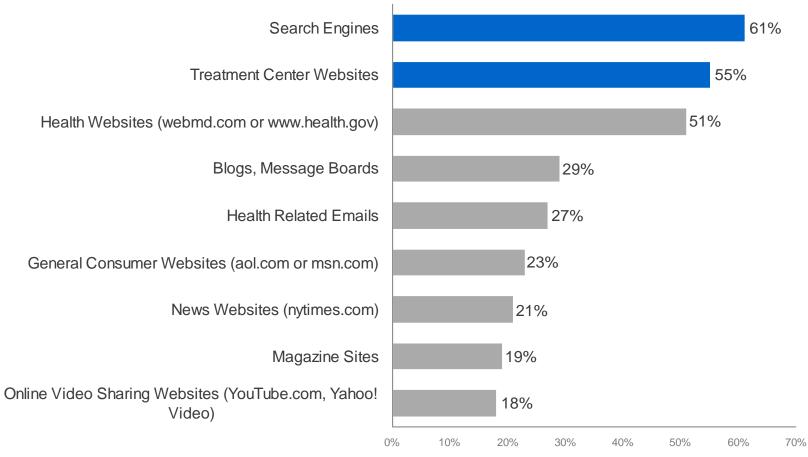
First Source Used to Research Treatment Centers



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

Majority Use Search & Treatment Center Websites

Online Resources Used to Obtain Information on Treatment Centers

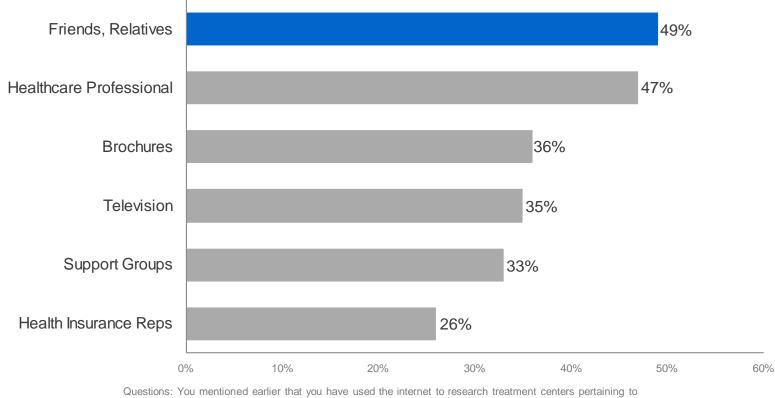




Question: Now thinking specifically about online sources, which of the following have you used to obtain information on treatment centers? Based on total: Total (1000); Sufferers (500); Caregivers (500) Source: OTX & Google Custom Treatment Center Study, June 2009

Additional Sources Used to Gather Information

Sources Used in Addition to the Internet



thinkhealth yourself or someone you care for. What other source

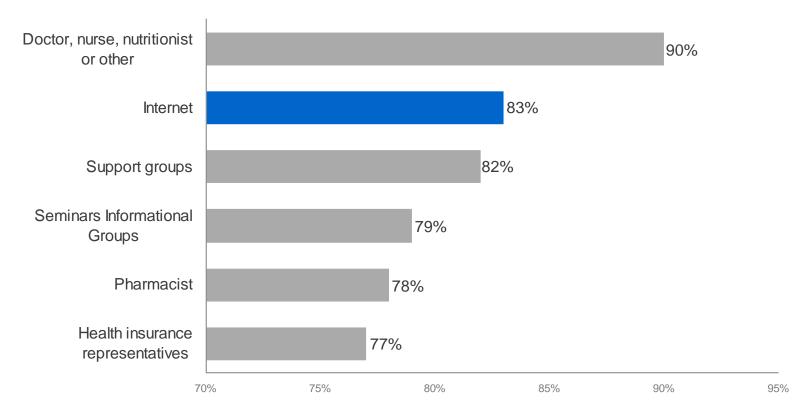
with Google

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 treatment centers? Based on total: Total (1000); Sufferers (500); Caregivers (500); Google Confidential and Proprietary 6 Source: OTX & Google Custom Treatment Center Study, June 2009.

Next to Speaking to a Healthcare Professional, the Internet Is the Most Useful Source of Info

Usefulness of Source in Treatment Center Choice Decisions



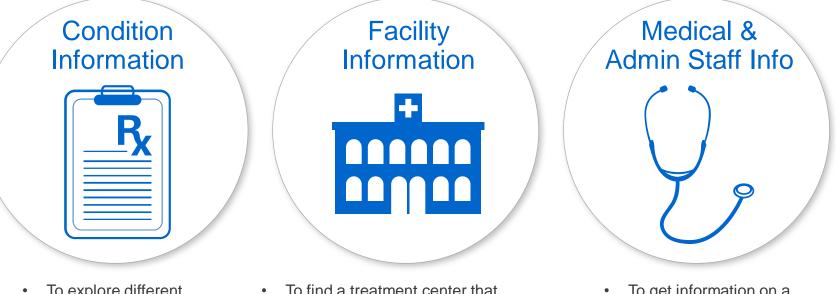


Question: Based on your experience, how useful are the following sources when choosing a treatment center. Based on total: Total (1000); Sufferers (500); Caregivers (500) Top 2 box: Extremely/Very useful Source: OTX & Google Custom Treatment Center Study, June 2009.

Google Confidential and Proprietary 7

Patients Look for Treatment, Facility and Staff Information

Reasons for Conducting Online Research



- To explore different treatment options
- To learn more about a condition
- To find out how you treat a condition

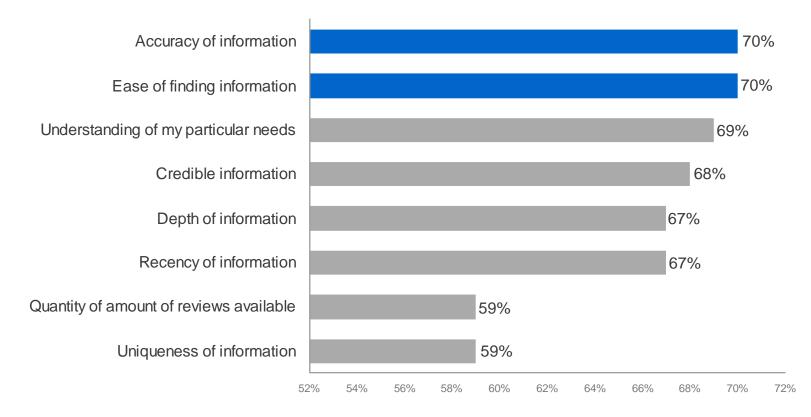


- To find a treatment center that specializes in a condition/treatment
- To compare facilities
- To research a facility recommended by a doctor, family member or friend
- To determine the convenience of a facility
- To research a facility seen from an ad
- To read online ratings and feedback

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

Treatment Center Info Seekers Are Most Satisfied with Accuracy & Ease

Satisfaction with Online Content



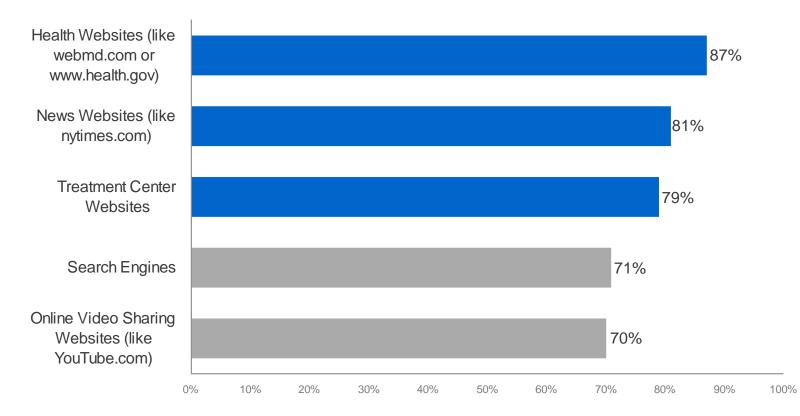


Question: When it comes to researching treatment centers online, how satisfied are you with the following? Based on those who used source to find information on treatment centers: Based on total: Total (1000); Sufferers (500); Caregivers (500) Top 2 box; Extremely/Very Satisfied: Source: OTX & Google Custom Treatment Center Study, June 2009.

Google Confidential and Proprietary 9

Search Engines Are Highly Trusted by Over Two-Thirds of Treatment Center Info Seekers

Most Trusted Online Sources of Treatment Center Info



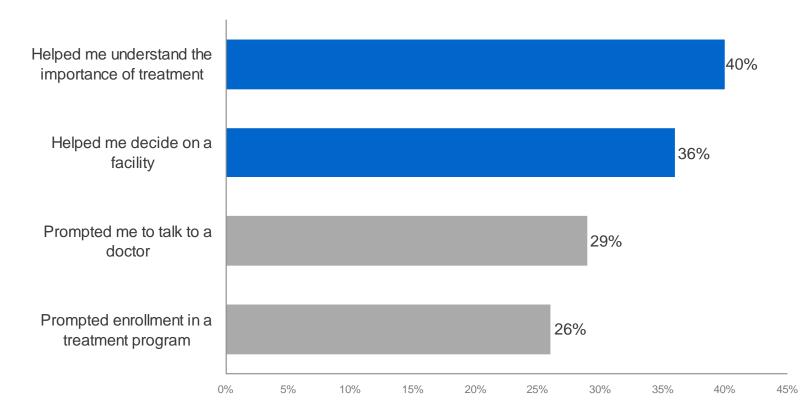


Question: How much do you trust the following online sources?

Based on those who used source to obtain information on treatment center: Total (181-610); Sufferers (112-284); Caregivers (69-326). Based on Top 2 box (4 or 5 on a 5 point scale where 5 is trust completely. Source: OTX & Google Custom Treatment Center Study, June 2009.

Internet Educates and Helps in Decision Choice

How the Internet Helped in Decision Choice

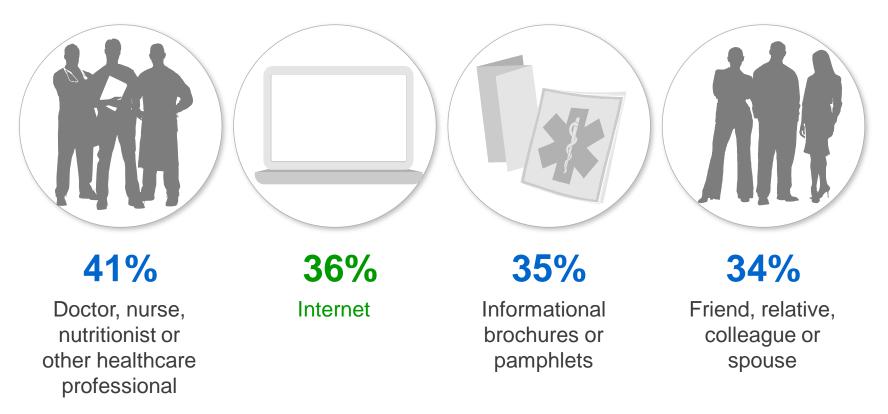




Question: Specifically, how have the following sources helped as you looked for information on treatment centers? Based on those who used source to find information on treatment centers (160-1000) Source: OTX & Google Custom Treatment Center Study, June 2009.

Internet Helps in Facility Choice

Sources That Helped Guide Facility Choice





thinkhealth Question: Specifically, how have the following sources here you do you to Question: Specifically, how have the following sources helped you as you looked for information on treatment centers?

Majority of People Take Action Offline 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 Treatment Center Study, June 2009.

Online Searches for Treatment Centers Have Higher Recall Rates than all Other Mediums

Advertising Recall

	Total		
Online Media (Net)	57%		
-V ad	34%		Search engine results
nformational brochures or pamphlets	31%		
lewspaper ad	23%		 Online/Website ad (banner ad or pop-up), but not a video ad
lagazine ad	23%		
Radio ad	17%		Online video ad (with video and audio qualities similar to
Billboard ad	16%		a TV ad, but seen on a website)



Question: In addition to all of the research that you did to learn about , which of the following advertisements do you recall seeing or hearing, if any? (Please select all that apply) Base: Total = 1000 (Sufferers = 500; Caregivers = 500). Source: OTX & Google Custom Treatment Center Study, June 2009.

Advertising Recall Leads Consumers to Take Action

Actions Taken Based on Advertising Recall

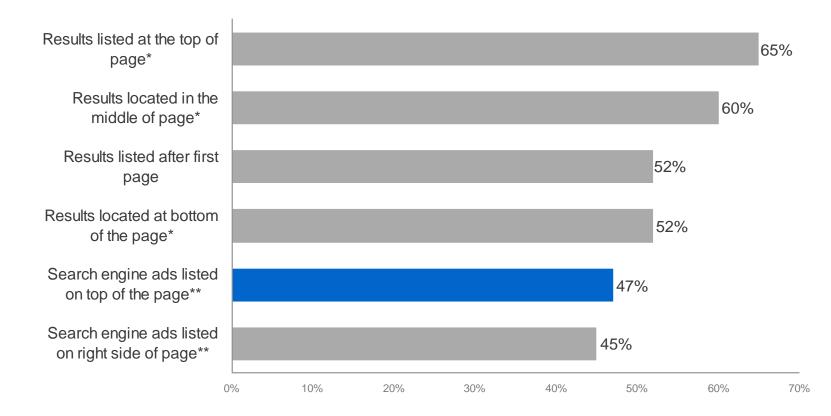
	Total
Looked online for more information about a treatment center	40%
Called a treatment center	36%
Asked a medical professional about a treatment center	32%
Thought more favorably about a treatment center	30%
Asked a friend or family member about a treatment center	29%
Requested more information be mailed to you	29%
Called a toll-free or 800 number	28%
Visit a treatment center	27%
Considered using a treatment center based on the search result	20%
Shared information on a social networking site, blog or message board	18%
Clicked on an ad for a specific facility, treatment option, etc	17%
Joined an online support group	17%
Booked an appointment or stay online	16%
Switched treatment centers	12%

thinkhealth with Google

Question: And, which of the following, if any, have you taken as a result of seeing or hearing advertising for treatment centers? Based on those who recall seeing advertising for treatment centers: Based on those who see advertising: Total (826); Sufferers (416); Caregivers (410); Source: OTX & Google Custom Treatment Center Study, June 2009.

Nearly One-Half of Treatment Center 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=977; Sufferers n=494; Caretakers n=493; Top 2 box: Extremely/Very Likely; Source: OTX & Google Custom Treatment Center Study, June 2009.

Google Confidential and Proprietary 16

Conclusions & Recommendations

Conclusions

The Internet is often the primary and most useful source to find information on treatment centers

Treatment center 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 treatment center 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



Like what you learned? Find more studies and data at

thinkinsights with Google"

www.google.com/think/insights