

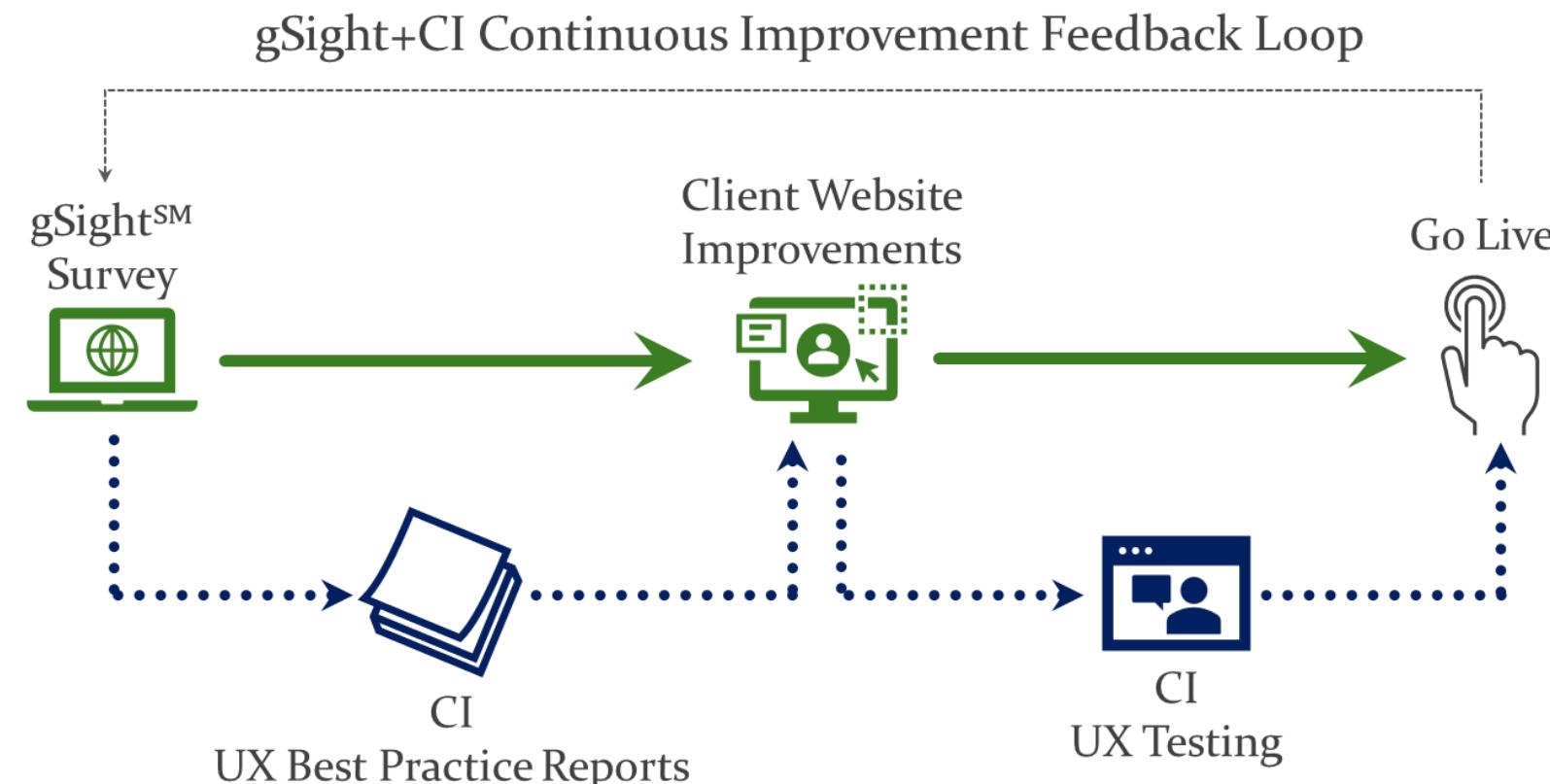
What are we learning from gSightSM and other research about AI's impact on website traffic?

Rob Klein, Founder & CEO, Klein & Partners

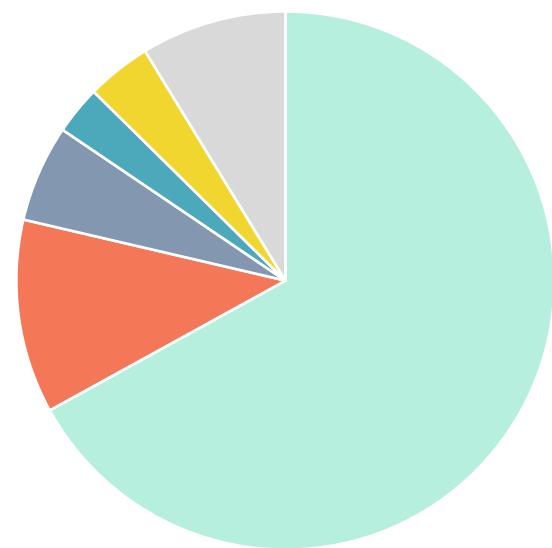
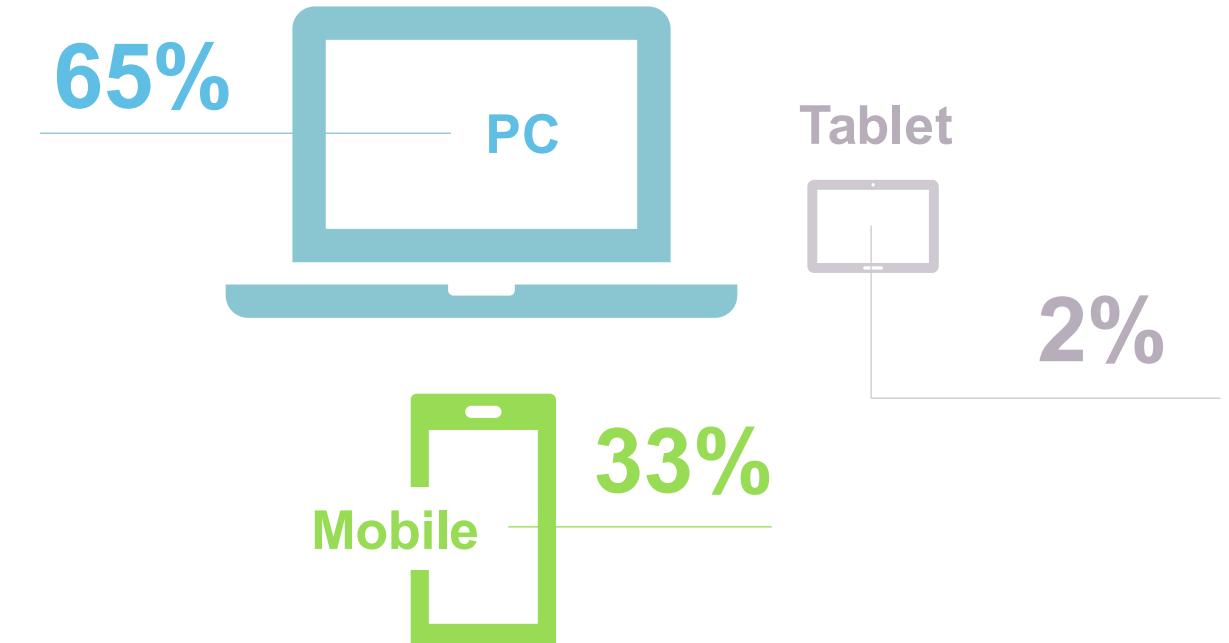
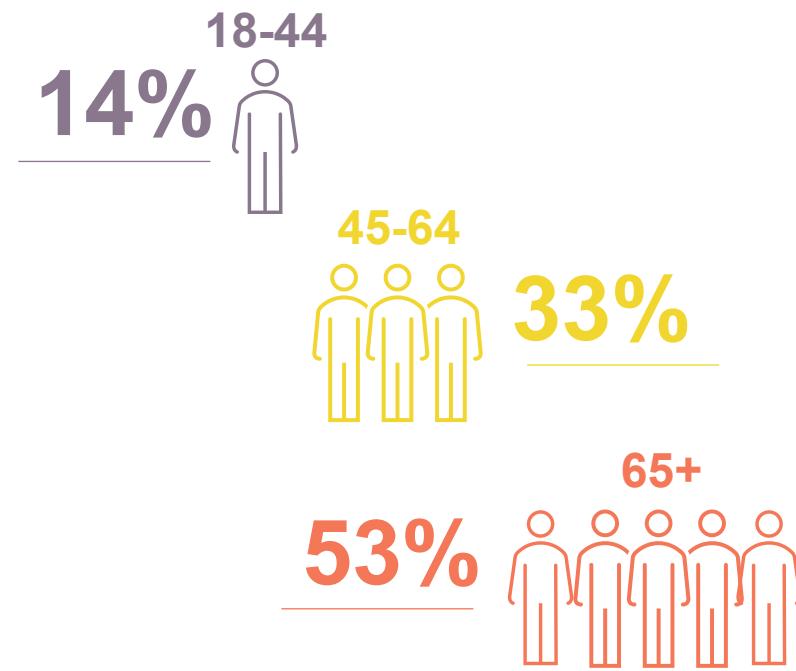
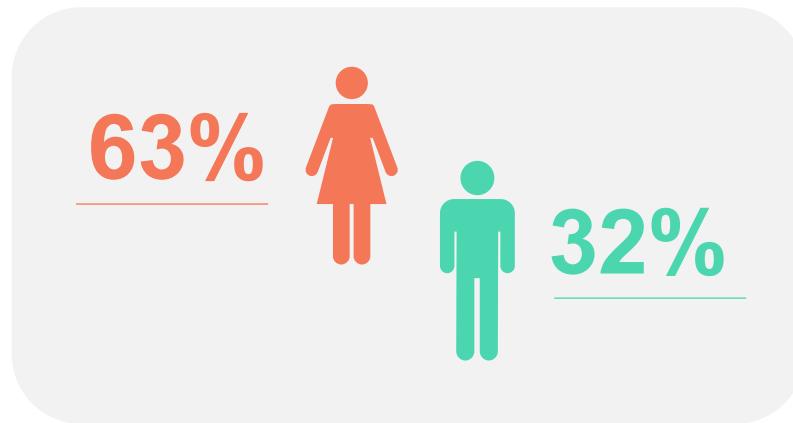
Mike Schneider, VP and Co-founder, Greystone.Net

What is gSight?

- Website experience pop-up survey
- Real-time dashboard; your scores in comparison to Benchmark, Leaderboard, and Peer Group scores
- Designed by healthcare market research and digital experts and market leaders
- Nearly 400,000 surveys
- Continuous improvement feedback loop in partnership with Corporate Insight, the leader in digital best practice intelligence

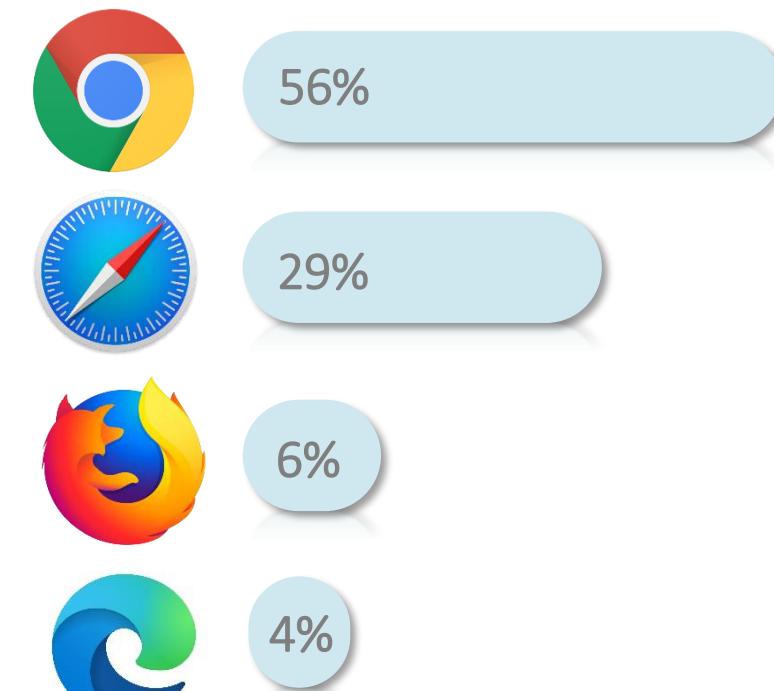


gSight Visitor Demographics (Q1-Q3 2025)



Legend:

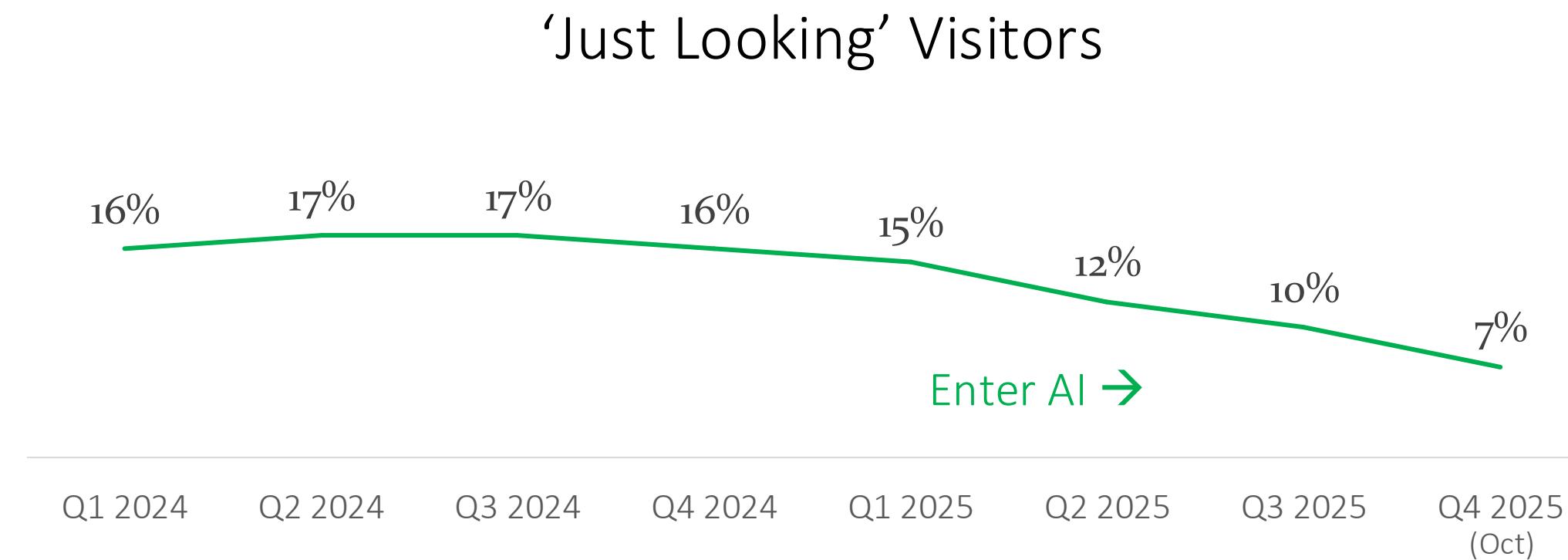
- Caucasian
- African American
- Hispanic
- Asian
- Other
- Prefer not to share



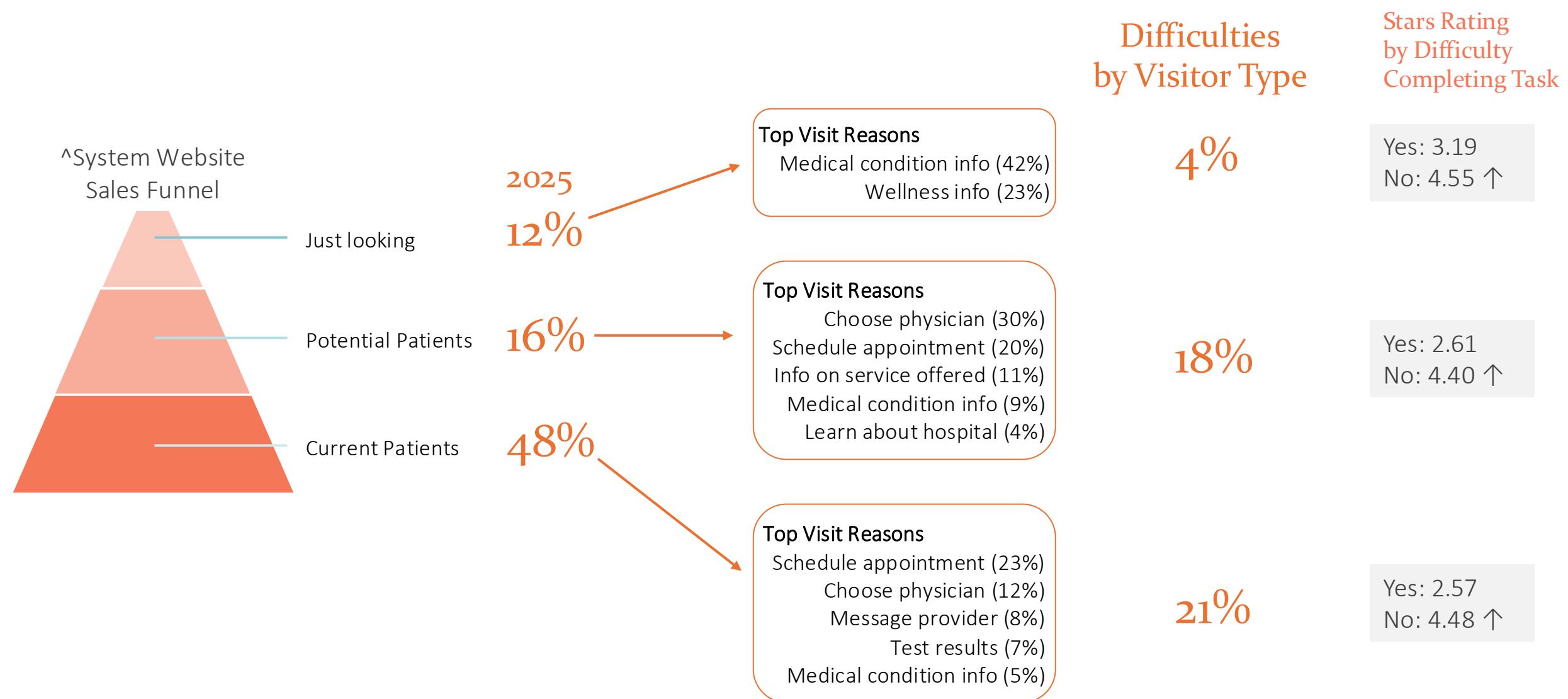
Key gSight Findings

What did we learn?

We are seeing a significant decline in 'just looking' visitors across the gSightSM database this year



Websites must focus on becoming ‘frictionless’ transaction sites as more and more visitors are entering farther down the sales funnel



Where visitors are in the sales funnel has a significant impact on how they get to your site

Website entry point	Current Patient (48%) (A)	Potential Patient (16%) (B)	Just Looking (12%) (C)
Typed in name	66% C	64% C	11%
Showed up in search	7%	24% A	78% AB
Clicked link in email or text	24% BC	8%	6%
Clicked on online ad	1%	2%	2%
Responded to off-line ad	1%	1%	1%
Responded to social media post	1%	1%	2%

For nearly one in ten visitors (8%), the most recent website visit created new negative feelings towards the brand → multiply 8% X the number of unique annual visitors to your site...

		Website entry point (Total)		
		Current Patient (48%) (A)	Potential Patient (16%) (B)	Just Looking (12%) (C)
Website visit driven	Brand driven	Re-affirm EXISTING POSITIVE feelings (42%)	51% BC	36% C
	Brand driven	Re-affirm EXISTING NEGATIVE feelings (3%)	4% C	2% 1%
	Website driven	Create NEW POSITIVE feelings (14%)	7%	21% A
	Website driven	Create NEW NEGATIVE feelings (8%)	10% C	9% C 1%
		Did not impact my feelings (33%)	29%	32% A 46% AB

The Impact of AI on Healthcare Search

Results from Klein & Partners' 2025 National Consumer Insights Study
conducted with Aha Media.



COVID-brain is here to stay and will continue to impact how we 'communicate' with people → including how we design websites

Memory

I am having **trouble** remembering simple things.

35%

30% 2024

25% 2023

27% 2022

Patience

I find myself **losing** my patience easier than before.

38%

37% 2024

30% 2023

33% 2022



Attention Span

I find it **harder** to concentrate and pay attention to things.

34%

32% 2024

29% 2023

29% 2022

Brand Linkage

Even if I remember an advertisement, I find it **harder** to remember who the company was.

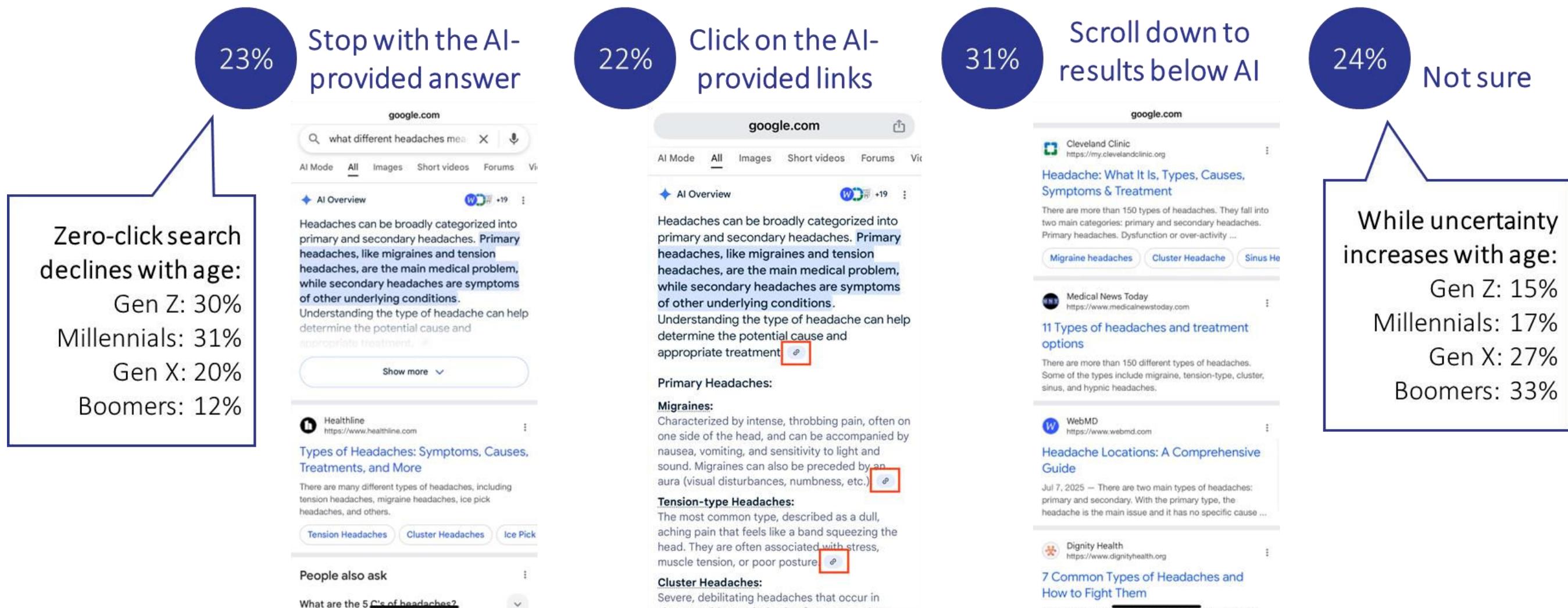
42%

31% 2024

33% 2023

34% 2022

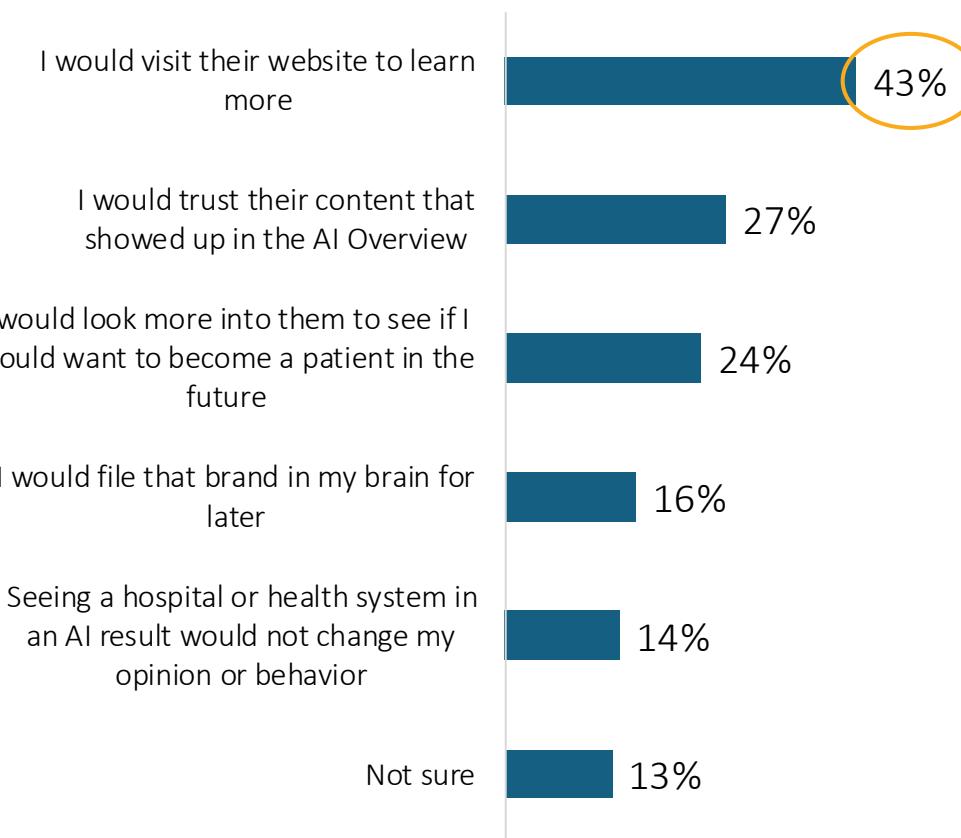
When you get a result from your health-related search, do you typically...



Q3 When you get a result from your health-related search, do you typically...
Note: Examples provided to respondents in the survey for context.

Getting into the AI Overview leads to website behavior

What would you do if a hospital you know shows up in AI Overview?



38%

Have made a healthcare decision based on an answer from an AI tool or an AI Overview in Google

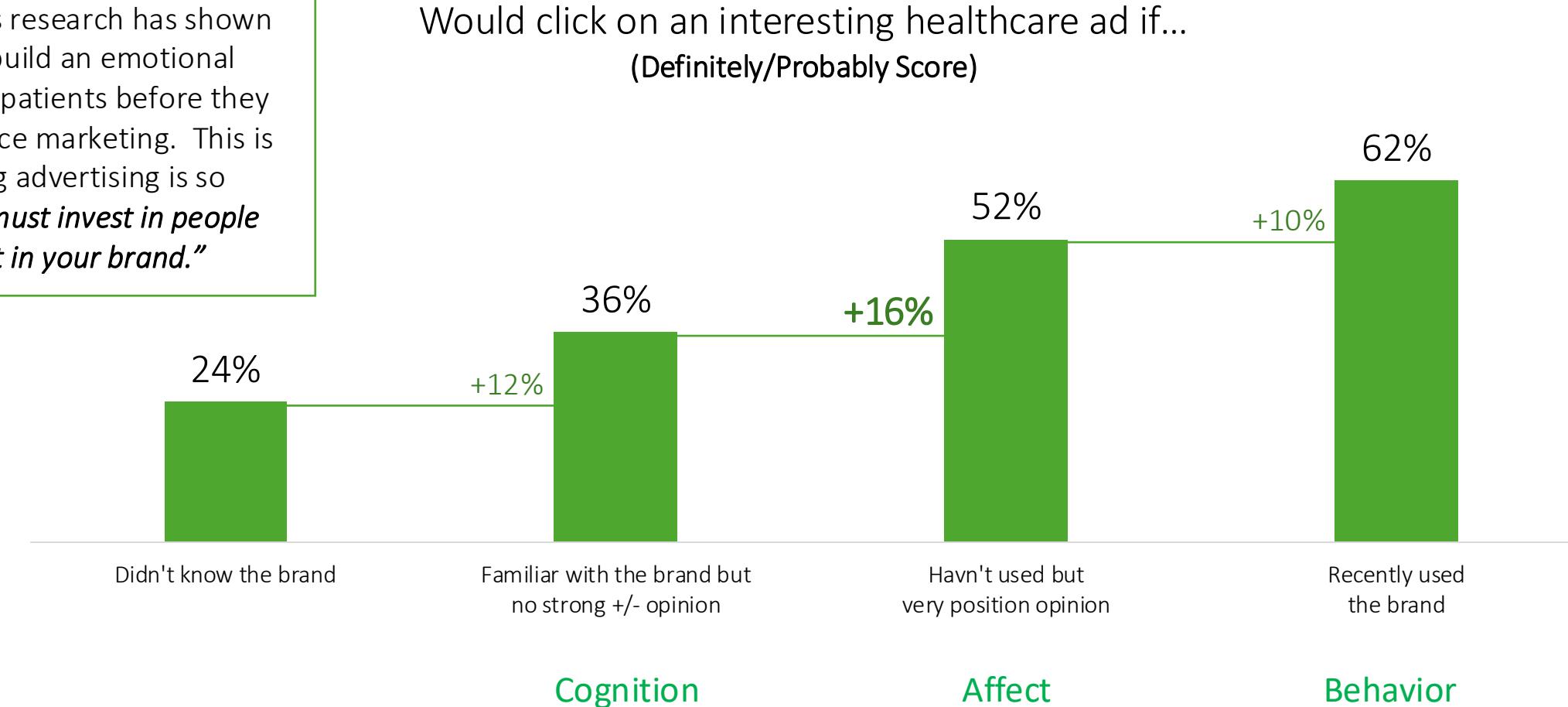
More likely men, younger, and higher socio-economic status

Q19 If you see a hospital or health system show up in the AI Overview that you are familiar with but have not used, which of the following applies to how you would react to seeing it?
Q20 Have you ever made a healthcare decision based on an answer from an AI tool or AI Overview on Google?

How a person 'feels' about the brand has more influence on clicking on the ad than prior 'use'

→ i.e., **Affect > Behavior in impacting ad clicks**

Other Klein & Partners research has shown that a brand must build an emotional relationship with non-patients before they respond to performance marketing. This is why brand-building advertising is so important. *"Brands must invest in people before they invest in your brand."*



Q22 If you were searching for a health-related topic and a digital ad popped up and you found the information to be interesting would you click on that ad if...
[Top-2 box score: Definitely + Probably % shown]



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g.Sight | Digital Experience
Analytics Platform