What are patients thinking?

Using online research to engage, measure and drive change

Why Providence's marketing team made the leap into online research

We didn't know:

- *<u>Why</u>* patients were choosing our doctors

- *<u>How</u>* they were choosing our doctors

- *<u>What</u>* the patient experience was really like

"Why does marketing even care about what patients want? We just need more volume!"

Which one are we?

Not all good ideas come with buyers.

How Providence made the leap into online research in 2009

Our path

1. Collected email addresses
2. Sent out simple "baseline" surveys to every patient email address
3. Invited participants to engage again
4. Followed-up with more research
5. Communicated results
6. **Repeat, repeat, repeat**

11,300

Jan. 2014

9,400

Jan. 2013

7,600

June 2012

Participation surpasses 10,000-member milestone

# of patients who have agreed to join our online patient panel

What we asked

- How choices were made
- What does and doesn't work
- Importance of online services
- Likelihood to recommend
- Effectiveness of marketing

Who are these people?

DEMOGRAPHICS

Using research to drive change

What really matters?

THE PATIENT VOICE

Expectations

- **Theory**: As long as patients get better that's all that matters

- **Reality:** Patients want compassionate care and good customer service throughout all interactions
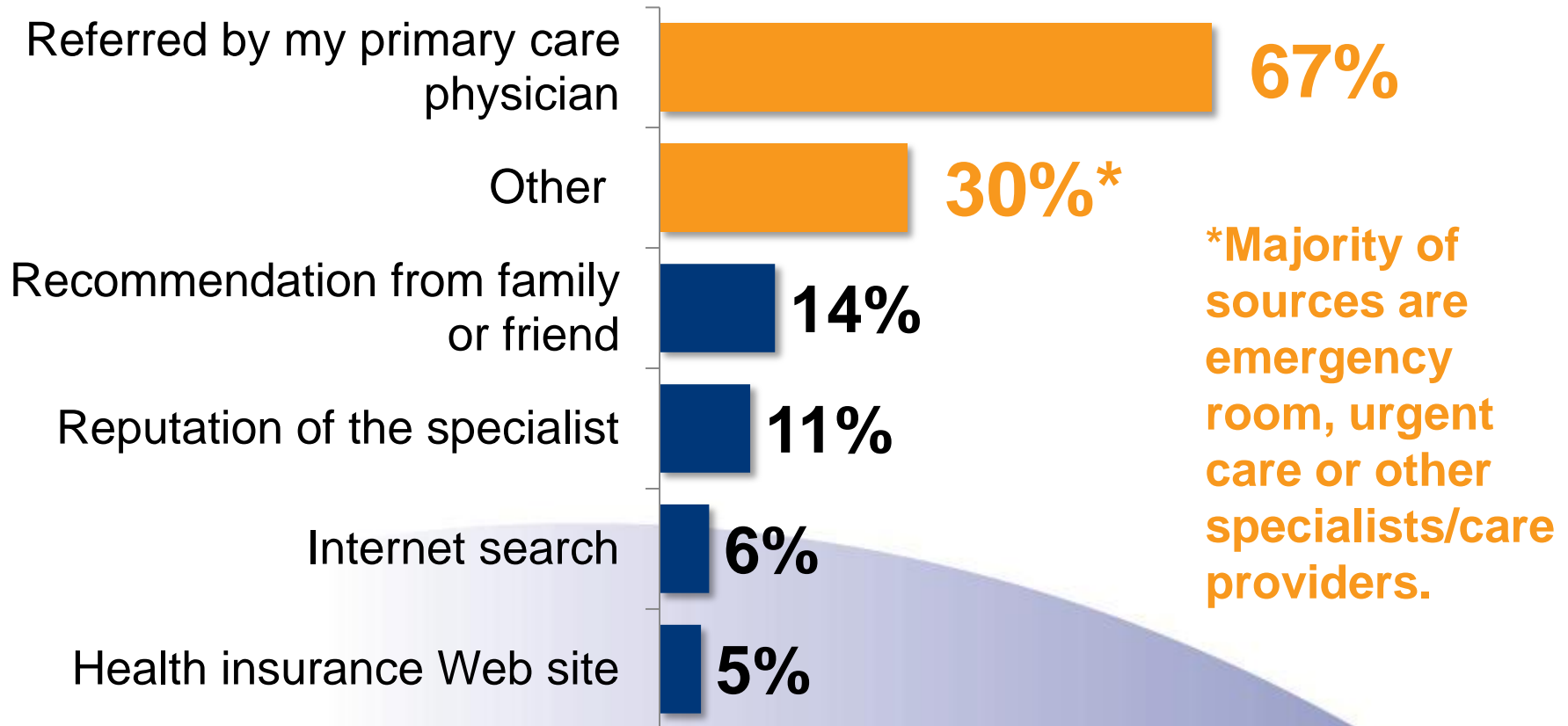
Our patients say

- **They value relationships with Providence, but are open to using competitors when we don't deliver on expectations**

- Likelihood to recommend a practice hinges on the experience from start to finish

- Quality rankings and outcome measures have limited appeal

Finding a provider

- **<u>Theory</u>: Advertising cures all problems with patient volume**

- **<u>Reality:</u> Referrals and recommendations are the top drivers**

How did you select a specialist? (Multiple responses allowed)

Referred by my primary care physician — 67%

Other — 30%*

Recommendation from family or friend — 14%

Reputation of the specialist — 11%

Internet search — 6%

Health insurance Web site — 5%

*Majority of sources are emergency room, urgent care or other specialists/care providers.

Taking research to the next level

Know me.
Care for me.
Ease my way.

The Providence Business and Customer Intelligence Journey

Phase 1: Laying The Foundation

- Building Discipline Excellence
- Moving to System-Wide Solutions
- Designing an Intelligence Platform

Phase 2: Building Excellence

- Foundational Research Programs
- Market Intelligence Tools
- Implementation BI/CI Platform

Phase 3: Research at the Core

- Platform informs all Strategic Decisions.
- Core Research Plan
- All Marketing Efforts Measured

Phase 4: Predicting the Future

- Advanced Analytics
- Predictive Modeling
- Proactive Patient and Caregiver Management

The **P**rovidence **R**esearch **S**ystem

INFORM:

Segmentation & Sizing
What segments exist and what % of the market do they represent?

Market Opportunity Analysis
What opportunities and threats exist in the market?

Brand Development
Who are we and what are our key attributes?

Habits and Practices
What do people do and what do they want?

The Providence Research System

TEST:

Concept Testing

Are we planning a valuable solution?

Positioning & Messaging

How should we position the solution? How should we message? What resonates?

Awareness & Perceptions

What are people's awareness levels and perceptions?

Campaign Testing

Do we have a valid concept? Will ads breakthrough and deliver CTA? Which tactics should we use? In market performance?

The <u>P</u>rovidence <u>R</u>esearch <u>S</u>ystem

<u>MEASURE:</u>

Customer and Product Satisfaction
Are patients and caregivers satisfied with Providence? Are people satisfied?

Online Patient Panel
What do our patients want? What are their satisfaction levels?

Brand Tracking
What's our brand equity? What attributes do we own? Competitors own?

Web Analytics
Who's visiting our web assets? From where? For what?

Competitive Analysis
How are we doing against our competition?

Advanced Analytics
What is the return on our marketing investment? What's Next?

INFORM   TEST

PRS

MEASURE

Key Market Research Programs in 2015

➢ Establish system-wide standards for conducting research

➢ Brand Development Research

➢ Developing Patient Journeys

➢ Design and develop a roadmap for the Providence Intelligence Platform

➢ Advertising Campaign Measurement

➢ Providence Patient Panel Expansion

➢ System-wide Awareness and Perception Tracking

➢ New Product Concept Testing

➢ Healthcare Segmentation & Sizing

Customer/patient Journey Map
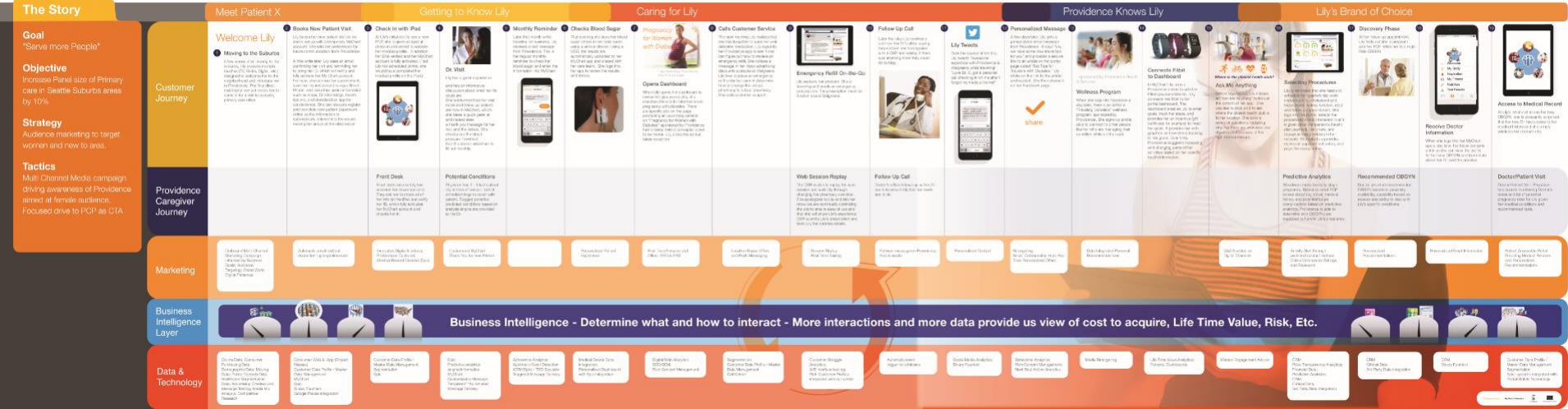
Advertising Test Platform

In order to insure our advertising is effective, Providence Ads are tested prior to launch in order to predict their market performance. Using a statistically significant, quantitative approach we are able to look at key areas like Breakthrough, Ad Reaction, and Brand Effect.

BREAKTHROUGH: Based on Attention / Memory

RESPONSE: Based on Ad Reaction / Brand Action
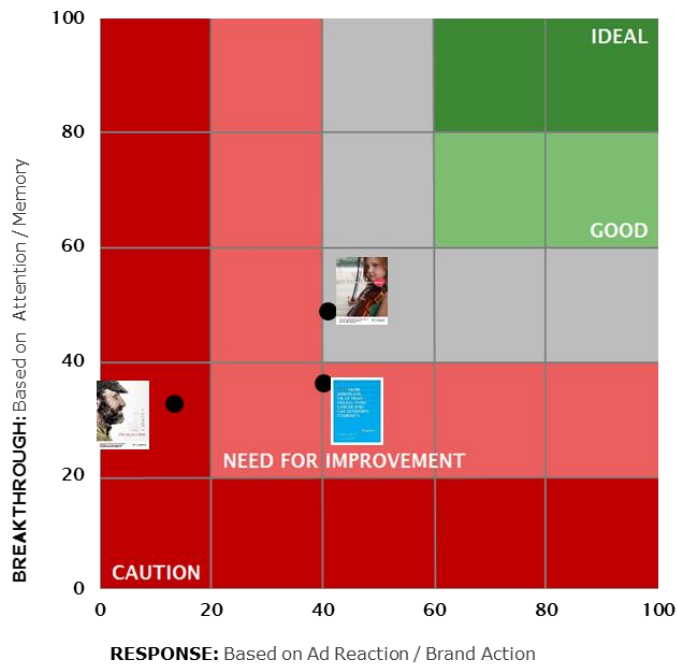
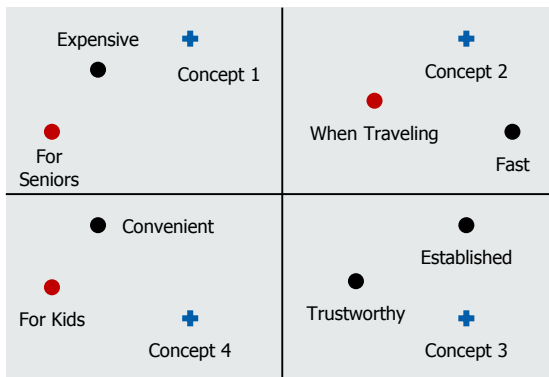|	AD 'Fact'	AD 'Girl'	AD 'Man'		< 20%	50%	> 20%
ATTENTION							
Brand noticed	42%	48%	34%		35%	50%	68%
Headline noticed	96%	81%	68%		20%	46%	73%
MEMORY							
Unaided brand recall	15%	19%	18%		17%	25%	38%
Aided brand recall	39%	52%	45%		42%	51%	66%
Message clarity	36%	42%	44%		43%	53%	62%
Ad recognition	82%	80%	90%		57%	66%	76%
REACTION							
Likeability	62%	69%	50%		51%	60%	68%
Relevancy	53%	38%	35%		35%	46%	55%
Credibility	64%	63%	46%		48%	54%	63%
Differentiation	56%	64%	63%		42%	51%	59%
Understanding	86%	72%	60%		49%	63%	74%
Fits the brand	69%	63%	55%		45%	56%	65%
EFFECT							
Interest	28%	44%	25%		34%	44%	54%
Intent to buy/use	11%	21%	18%		24%	36%	42%

ABOVE Top 20%   ABOVE benchmark   AROUND benchmark   BELOW benchmark   BELOW Bottom 20%
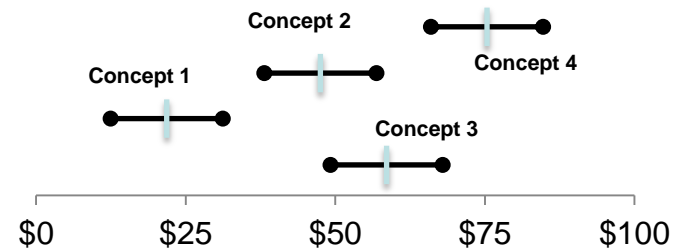
Product Concept Research

Quantitative Research with a sample size of 1,500 consumers across 3 states which will help us identify which segments of the market are interested in future product offerings and at what price point.

Example Outputs

Allows Providence to map the benefit ratings and usage preferences against service delivery channels to visualize the marketplace

Expensive
Concept 1

For Seniors

When Traveling

Concept 2

Fast

Convenient

For Kids

Concept 4

Trustworthy

Established

Concept 3

Show market pricing thresholds and expectations for service delivery channels

Concept 2

Concept 4

Concept 1

Concept 3

$0 $25 $50 $75 $100

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Our Journey: Building the Providence Research System

Stage 4: Research is at the Core
Research informs all Strategic Decisions.
All Marketing Efforts Measured

Stage 3: Predicting the Future
Core Research Plan
Advanced Analytics
Predictive Modelling

Stage 2: Building Excellence
Foundational Research Programs
Market Intelligence Tools
Design and Implementation of CRM

Stage 1: Laying the Foundation
Building Discipline Excellence
Moving to System-Wide Solutions
Building Infrastructure

The Providence Research System

Know Me, Care For Me, Ease My Way

INFORM

CRM/PRM
Who are our patients/caregivers, what do we know about them, and how can we best serve them?

Segmentation & Sizing
What segments exist and what % of the market do they represent?

Market Opportunity Analysis –
What opportunities and threats exist in the market?

Branding –
Who are we and what are our key attributes?
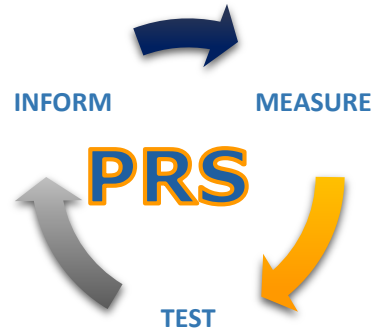
Habits and Practices –
What do people do and what do they want?

Concept Value –
Are we planning a valuable solution?

Positioning --
How should we position the solution?

MEASURE

Messaging –
How should we message? What resonates?

Awareness & Perceptions –
What are people's awareness levels and perceptions?

Campaign Testing –
Do we have a valid concept? Will ads breakthrough and deliver CTA? Which tactics should we use?

INFORM   MEASURE

PRS

TEST

TEST

Customer and Product Satisfaction –
Are patients and caregivers satisfied with Providence? Are people satisfied with our offerings?

Online Patient Panel–
What do our patients want? What are their satisfaction levels?

Brand Tracking –
What's our brand equity? What attributes do we own?

Campaign Tracking –
Are we meeting our goals? Did ads breakthrough? Which ads/tactics perform best?

Web Analytics –
Who's visiting our web assets? Are they doing what we want? What are people searching for?

Competitive Analysis –
How are we doing against our competition?

Advanced Analytics –
What is the return on our marketing investment? What's Next?

Key Programs in 2015

- Brand Research
  - Brand Awareness; Brand Identity; Key Attributes
- Segmentation
  - Who are our current customers? Identify new customers?
- Awareness and Perception Tracking
  - Top of Mind Awareness; Familiarity; Favorability; Intent to Use; & Willingness to Recommend
- Patient Panel Expansion
- Satisfaction
  - Patient & Physician Satisfaction
- Campaign Measurement
  - Concept Testing; Ad Testing; Campaign In Market Tracking

What healthcare needs to learn about research

Market Research

A Market Research Program is a systematic approach that can guide your most important, strategic business decisions by:

1. Enabling better decision making

2. Helping to identify opportunities and future trends

3. Identifying key areas to increase patient/caregiver satisfaction

4. Guiding your communication with current and potential customers

5. Identifying key risk areas

Research Misconceptions

- Research is too expensive.
  - But not doing research could be far more costly
- Research takes too long
  - Times Vary. Don't automatically assume there isn't enough time
- We already know what our patients and caregivers need and/or want.
  - Don't assume we know what will meet their needs
- We know what drives our key metrics
  - Correlation doesn't necessarily mean Causation. For example just because someone is willing to recommend doesn't necessarily mean they have high satisfaction scores

Using the patient panel to test new care concepts

Scenario: Offering video visits to existing patients and health plan members

- Initial concept testing – 1,300 surveyed

- Product development – Live focus groups

- Product testing – Live user groups

- Product refinements – 500+ surveyed

What we learned

- **More than 70% of people were interested in using the service**
- Nearly 80% expected to pay less for the service than a regular office visit
- 66% percent said their impressions of Providence were more positive after learning more about the planned product.
- **Overall result:** Confirmed our basic direction, but resulted in a faster timeline and a push for mobile functionality