

Providers of choice: Essential hospitals in a new era of competition



PRESENTED BY Rich Neimand, Dave Clayton
June 26, 2015

Agenda

- Your goals
- The opportunity
- Consumer research
- Healthful marketing
- Break-out work
- Group reports
- Takeaways



Your goals



What do you want to learn today?



**The market has changed—
change the way you market.**



Your goal is to provide high-quality health outcomes to everyone as a provider of choice for individuals from all walks of life.



Many of the patients you once served by default now have a choice of how and where to be served.



The screenshot shows the Mayo Clinic website homepage. At the top, there is a navigation bar with links to "Admin Stuff", "Shopping", "Religious School", "Apple", "News", "Paddling", "Apple", "Bike", "House Remodel", "Read Later", "bitty", and "Wesleyan Chr... - MaxPreps". Below this is a search bar with the placeholder "Search Mayo Clinic" and a magnifying glass icon. To the right of the search bar are links for "Request an Appointment", "Find a Doctor", "Find a Job", "Give Now", "Log in to Patient Account", "Translated Content", and social media icons for Twitter, Facebook, Google+, YouTube, and Pinterest.

The main menu below the search bar includes "PATIENT CARE & HEALTH INFO", "DEPARTMENTS & CENTERS", "RESEARCH", "EDUCATION", "FOR MEDICAL PROFESSIONALS", "PRODUCTS & SERVICES", and "GIVING TO MAYO CLINIC".

The main content area features a large banner with the text "YOU ARE..." and "THE CAMPAIGN FOR MAYO CLINIC" over a dark blue background with white radial lines. To the right of the banner is a blue callout box containing the text "Mayo Clinic launches \$3 billion campaign to set new world standard in care" with a play button icon. Below the banner are control buttons for a video player: a double arrow, a square, a circle, a triangle, and a double triangle.

Below the banner, there are several sections:

- Patient care and health information**: Describes the expertise of over 3,300 physicians, scientists, and researchers. Links include "Doctors and Medical Staff", "Patient and Visitor Guide", "Patient Online Services", and "Patient Care and Health Information".
- Appointments**: States that Mayo Clinic accepts appointments in Arizona, Florida, and Minnesota at Mayo Clinic Health System sites. Includes a "Request an Appointment" link.
- For medical professionals**: Describes services for medical professionals. Includes a "See For Medical Professionals" link.
- Research**: Describes research advances patient care, clinical trials, and publications. Includes a "See Research" link.
- Medical education**: Describes medical and scientific education opportunities. Includes a "See Medical Education" link.



Admin Stuff ▾ Shopping ▾ Religious School ▾ Apple News ▾ Paddington ▾ Apple ▾ Bike ▾ House Remodel ▾ Read Later billy Wesleyan Chr... - MaxPreps

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Osteoarthritis of the Knee?

3 Signs It's Time to Change Your Treatment

Learn More Now

Will You Die by 2020?

A new online test claims to predict your risk of death within the next 5 years. But there are a few big catches, and experts question how useful the tool really is.

Top Stories

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Study: Pesticides Linked to ADHD

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Get the Facts about a Prescription Treatment That Works Differently »

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Trending Topics

Transgender	Heat Stroke
Spinal Stenosis	Sun Poisoning
Potato Salad	CrossFit Workout
Asperger's	Serotonin

9



Do you have sleep apnea?

These questions can help you and your physician figure out if you should be tested for sleep apnea. Click on **Show Score** to get the total and see what it means.

Questions for Sleep Apnea

1. Do you snore more than once a week?
2. Is your snoring loud enough that it wakes up your bed partner or door or wall?
3. Has anyone ever told you that you stop breathing or gasp for air during sleep?
4. What is your current weight compared to your ideal weight?
5. Have you had trouble staying asleep or been tired even though you were sleeping well, since being treated for depression?
6. Do you ever doze off while driving or when you are not driving?
7. Do you ever doze off while working?

Score:

Interpreting the score:

- 0 to 5: **Low probability of sleep apnea.** Your sleep problems are more likely to be caused by something other than sleep apnea. Consult your doctor for a diagnosis.
- 6 to 8: **It's uncertain whether you have sleep apnea.** You and your doctor should decide the next step based on other pieces of your medical history.
- 9+: **You may have sleep apnea.** You are a good candidate for a sleep study and should see your doctor immediately

This questionnaire is not intended to replace professional diagnosis.

Source: Harvard Health Publications

See a doctor immediately if you suspect sleep apnea

Sleep apnea can be a potentially serious disorder, so contact a doctor immediately if you spot the warning signs. An official diagnosis of sleep apnea may require seeing a sleep specialist and taking a home-based sleep test using a portable monitor, or an overnight stay at a sleep clinic.



It now goes beyond access to meeting personal aspirations and who is best at guiding actualization.



If you want to be a provider of choice to a wider range of people, appeal to a wider range of aspirations that cut across demographics.



People aspire to be healthful,
but don't know how—you win when
you're a partner who can both
navigate and deliver.



Package your strengths as partners with individuals and communities—market them for a competitive advantage.



Aspirational outcomes are just as important as clinical outcomes.



Healthful is the new healthy.



A recent national study of 1,334 consumers focuses on motivations for personal health decisions and shows growing emphasis on self-direction, aspiration and valued partners.



Audience characteristics

Income

- 13% < 20K
- 18% 20-35K
- 19% 35-50K
- 35% 50-100K
- 15% > 100K

Community

- 50% suburban
- 26% urban
- 23% rural

Health insurance

- 50% employer
- 26% private
- 22% none
- 2% COBRA



1

Americans are becoming more self-directed in their health behavior.

% Utilize Technology to Help Manage Health-related Activity

(Often/Always and Sometimes/Occasionally)



(e.g., tracking nutrition or calories)



Physical Health Issues

(e.g., monitoring your cholesterol or blood pressure)



Personal Health Records

(e.g., tracking lab or test results)



Fitness and Activity Levels

(e.g., tracking miles walked or calories burned)



Mental Health

(e.g., monitoring of sleep)



- Nearly seven in ten (68%) Americans at least occasionally use technology to help manage one or more health-related activities.
- Most **seek information**, form **goals** and fulfill **regimens** on their **own initiative rather than at the direction of doctors** or fitness experts.

1

There is some variation across income levels.

% Utilize Technology to Help Manage Health-related Activity

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(e.g., tracking nutrition or calories)



Physical Health Issues

(e.g., monitoring your cholesterol or blood pressure)



Personal Health Records

(e.g., tracking lab or test results)



Fitness and Activity Levels

(e.g., tracking miles walked or calories burned)



Mental Health

(e.g., monitoring of sleep)



- While less likely than wealthier peers, 44% of lower income individuals report using technology to help manage one or more health-related activities.
- When it comes to using technology for these tasks, higher income individuals are typically 10% more likely than those at middle income levels, who are another 10% more likely than those with lower incomes.

2

Americans trust themselves, but many aren't living up to their expectations.

Decision-making



38-34%

Spouse
& Family



43%

Health
Professionals



54-59%

**Very Confident
Very Responsible**



17%

**Better than
Expected**



36%

Behind



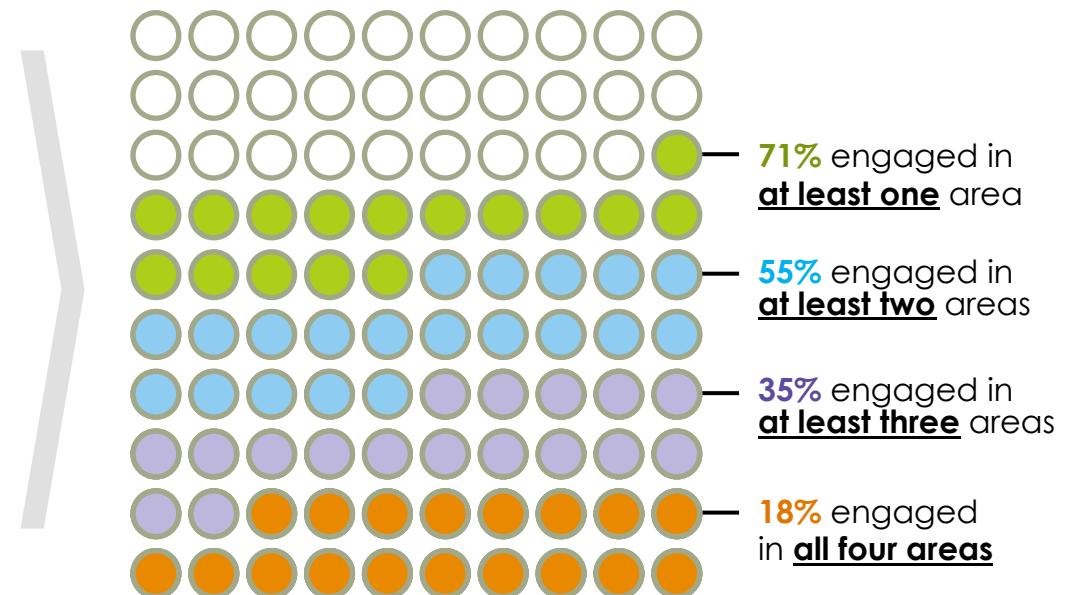
- Health professionals and family are influential.
- Individuals feel confident and responsible in their goals and plans—with those reporting lower incomes feeling relatively less so compared to high and middle incomes.
- Over a third are behind where they expected to be on goals and plans.

3

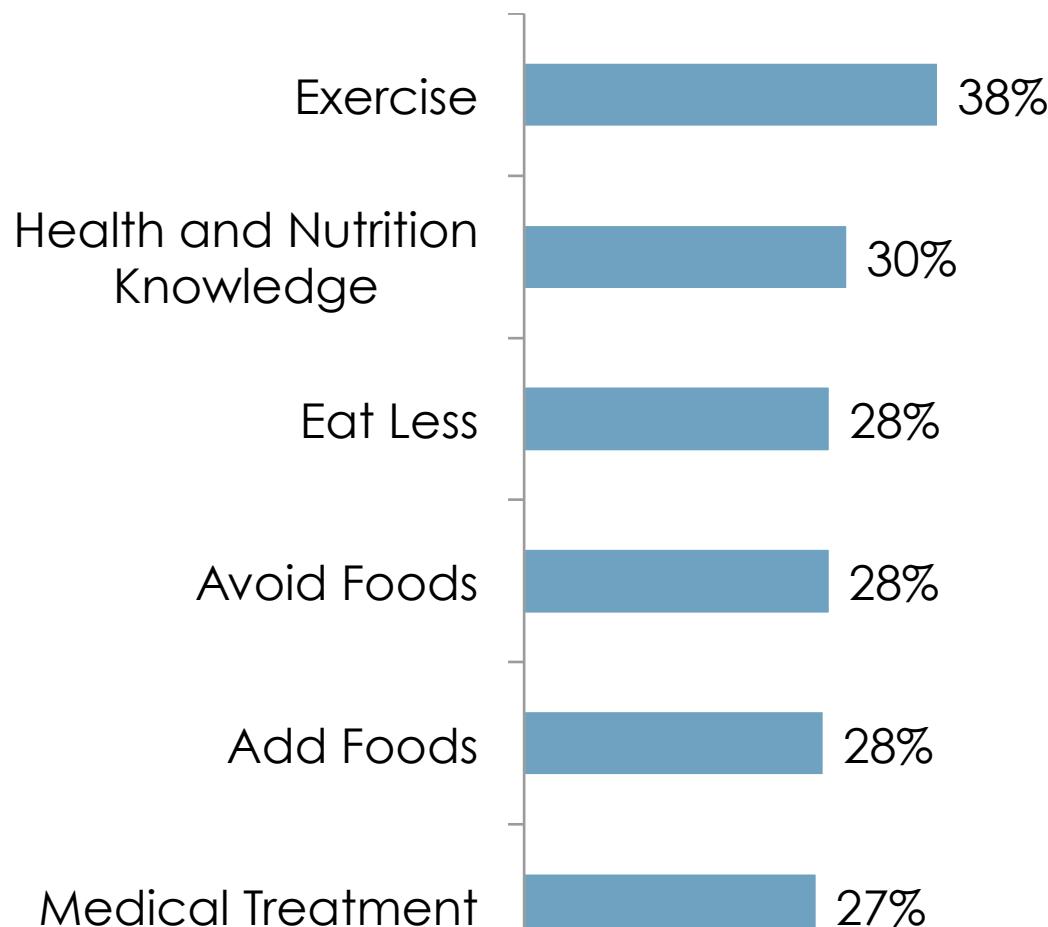
Doing multiple things in the desire to be healthful.

Four health improvement activities:

-  Monitoring diet and nutritional intake
-  Participating in exercise or physical activity
-  Undertaking and maintaining serious behavior modification, such as quitting smoking or reducing alcohol consumption
-  Engaging in activities to promote emotional balance and mental health



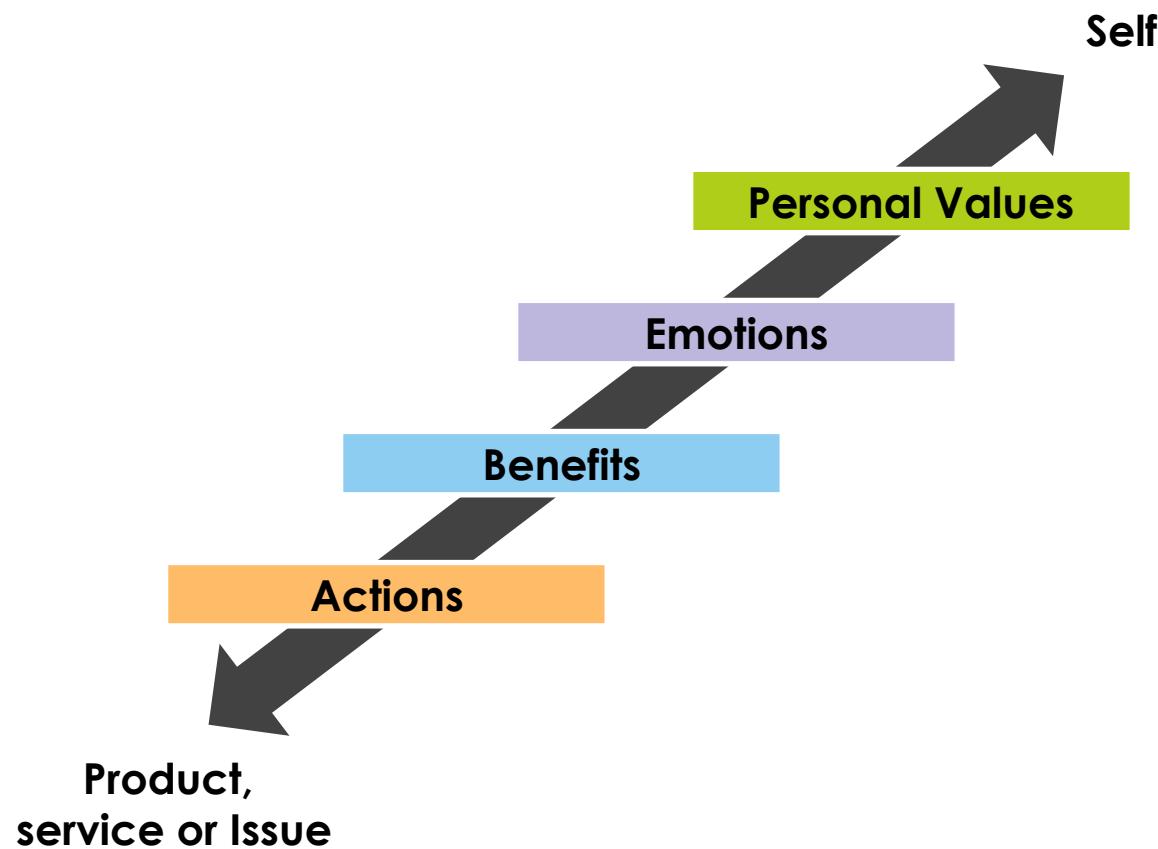
Top actions to address health concerns.



*Top 2 Box: 6-7 rating on a 7-point scale

4

Bridging from actions to personal values.



4

Americans view healthful lifestyles as a journey – the pathway to achieve many life values.

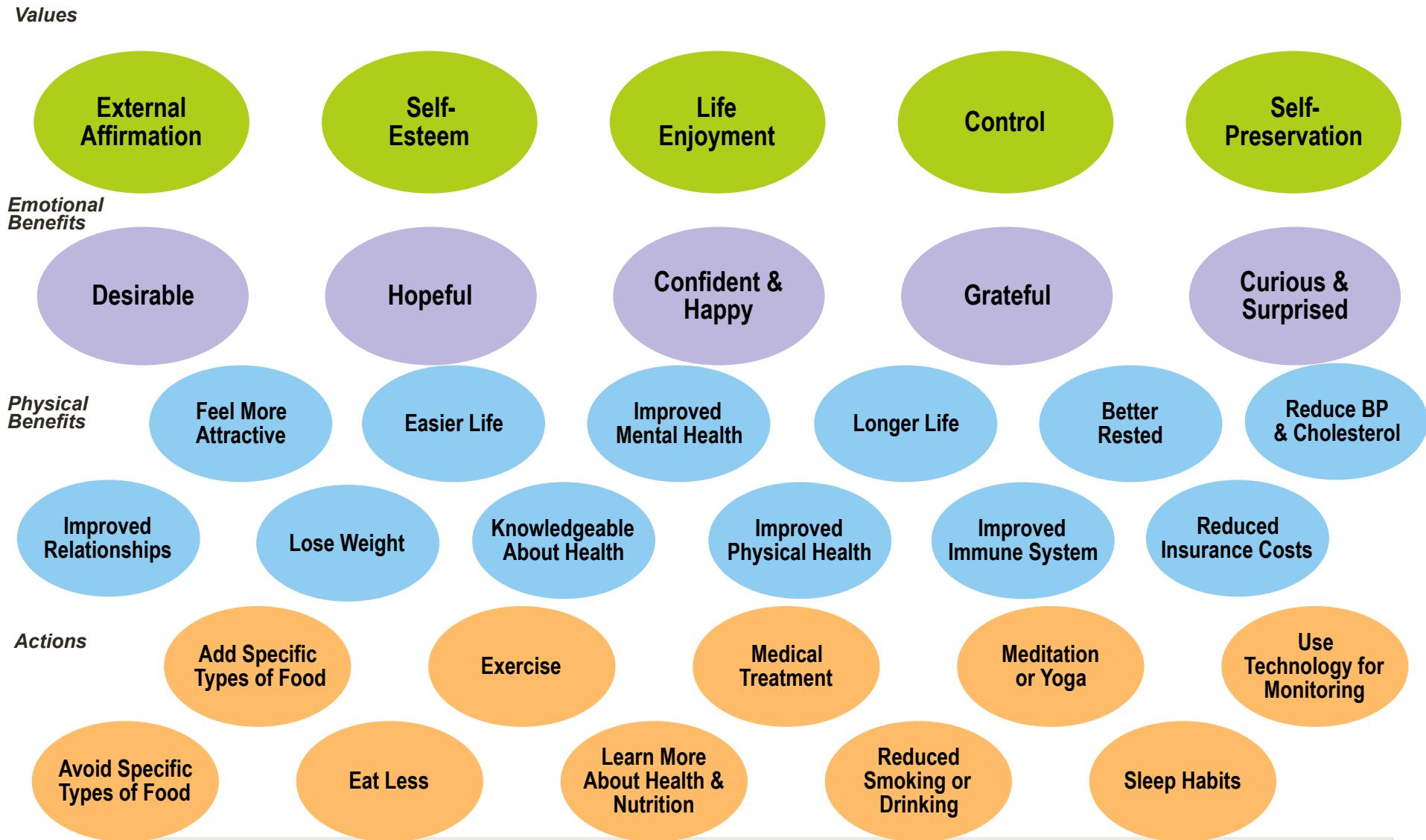


How do consumers' actions connect to their personal values?



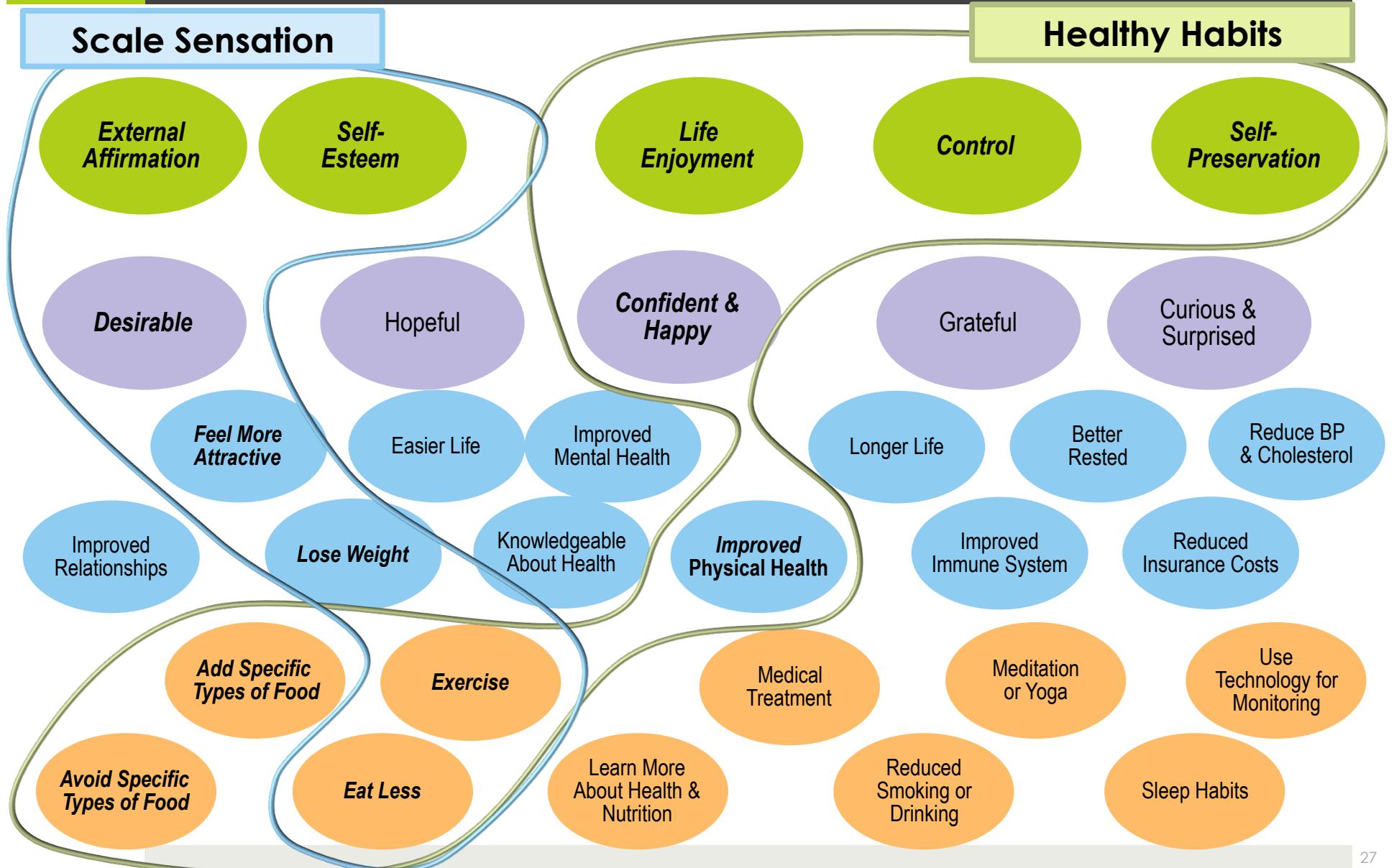
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Healthfulness map.



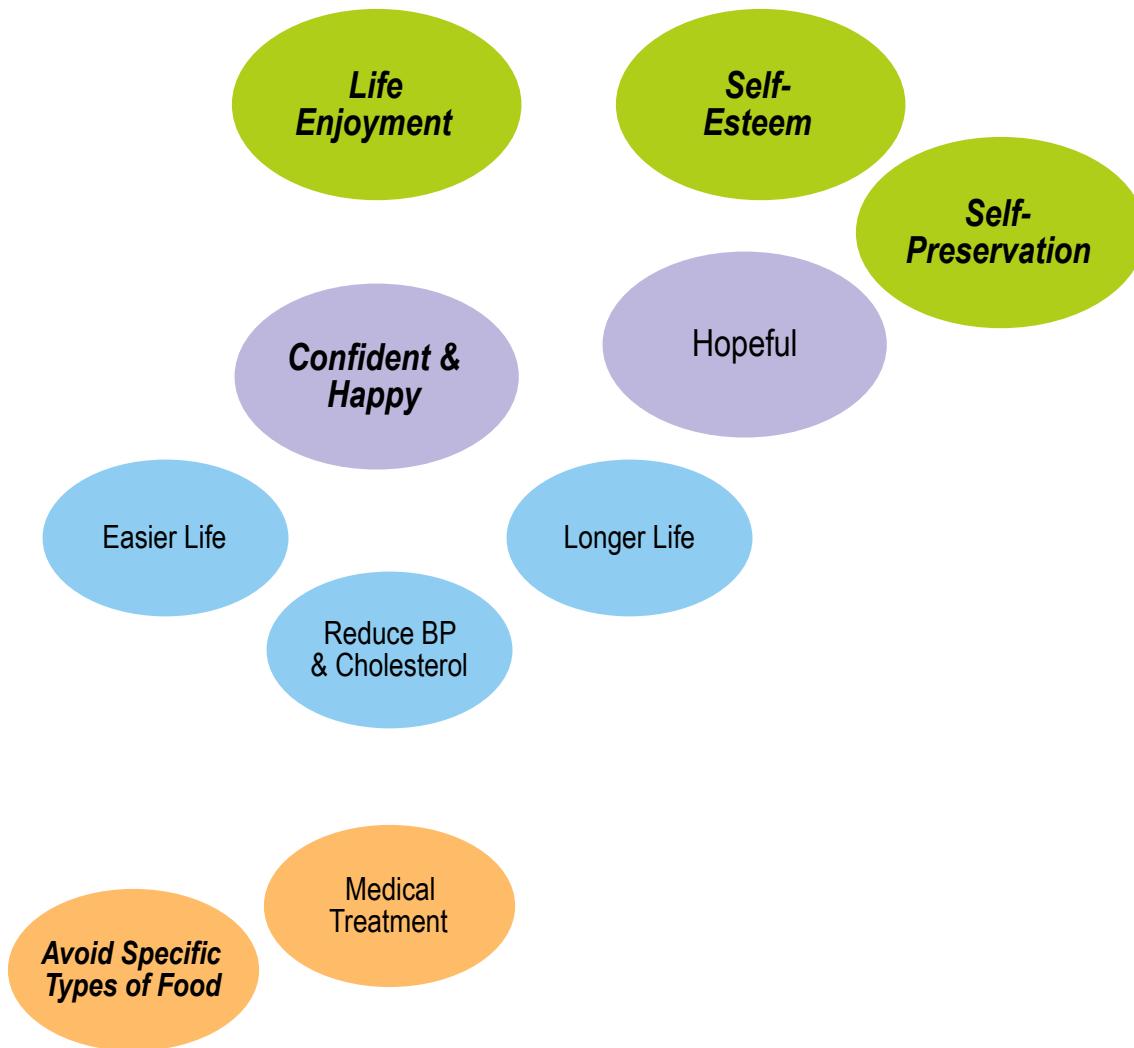
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Top health orientations.



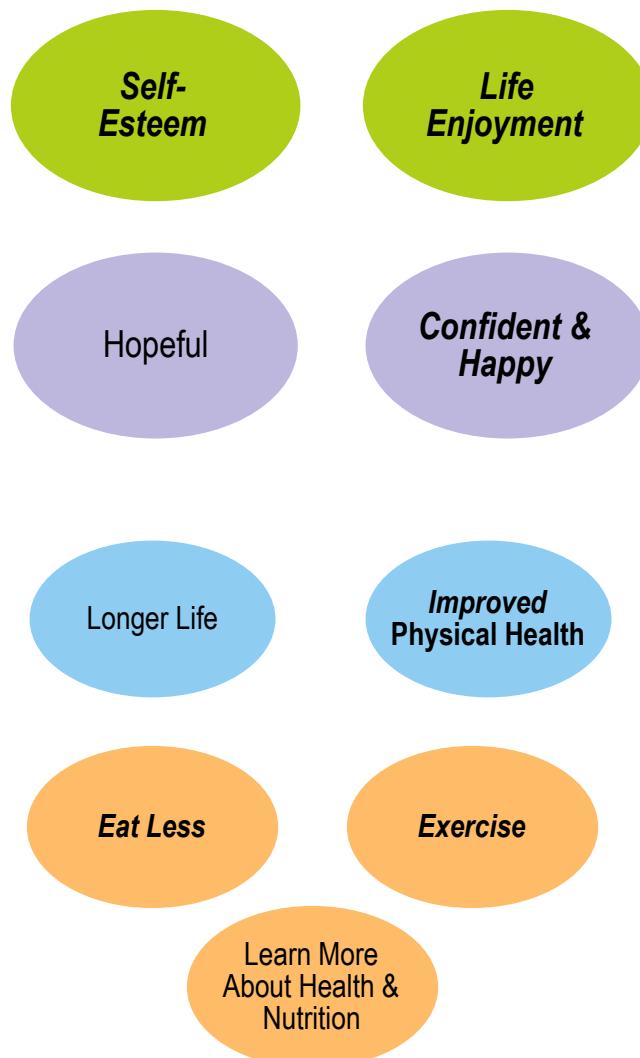
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Medical management.



4

Determined diet.



5

Americans may be classified into 1 of 7 health journeys.



Adoption of healthy nutrition and exercise patterns in order to attain an active, enjoyable life

A focus on the actions that will lead to weight loss and improved appearance to raise internal and external esteem

An educated focus on health via specific foods and controlled intake to achieve a longer and more enjoyable life

Medical treatment for specific ailments to improve outcomes and enable a more active and fulfilling life

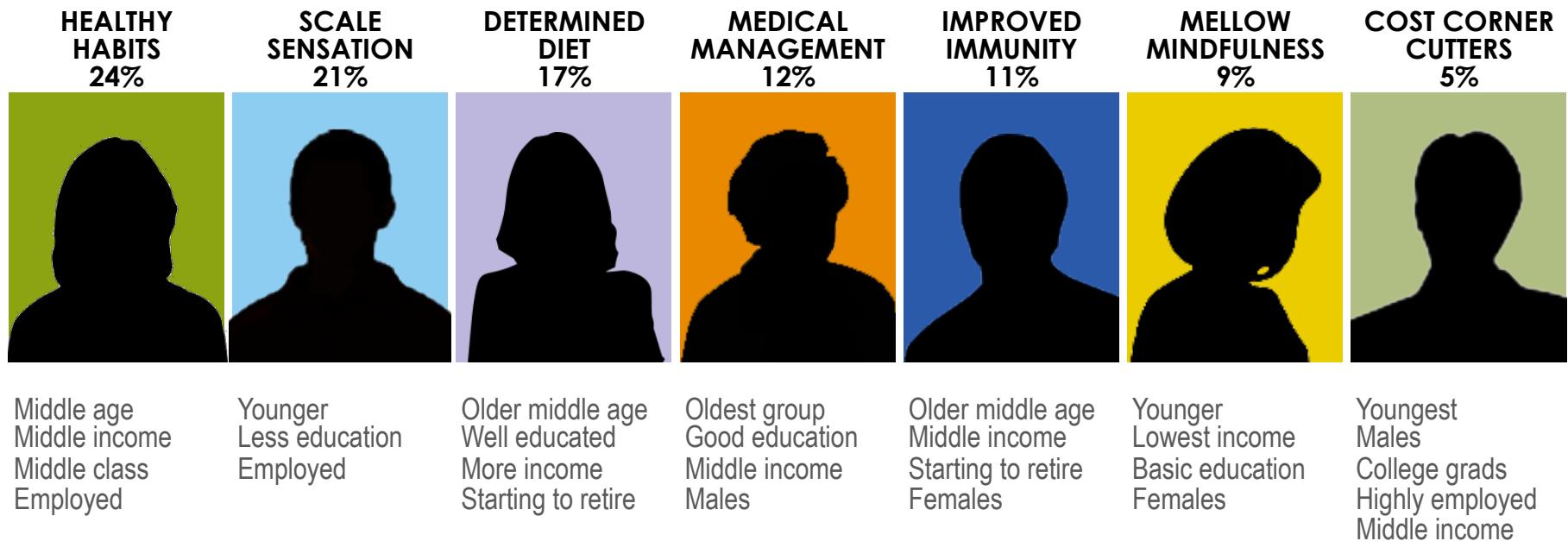
Consumption of specific foods to improve the immune system, resulting in a confident sense of control

Seeking a more harmonious life through mindful practices, such as meditation and yoga, and greater understanding of the holistic nature of physical and mental health

Undertaking major behavioral changes in an effort to reduce the cost of health insurance to attain a sense of control

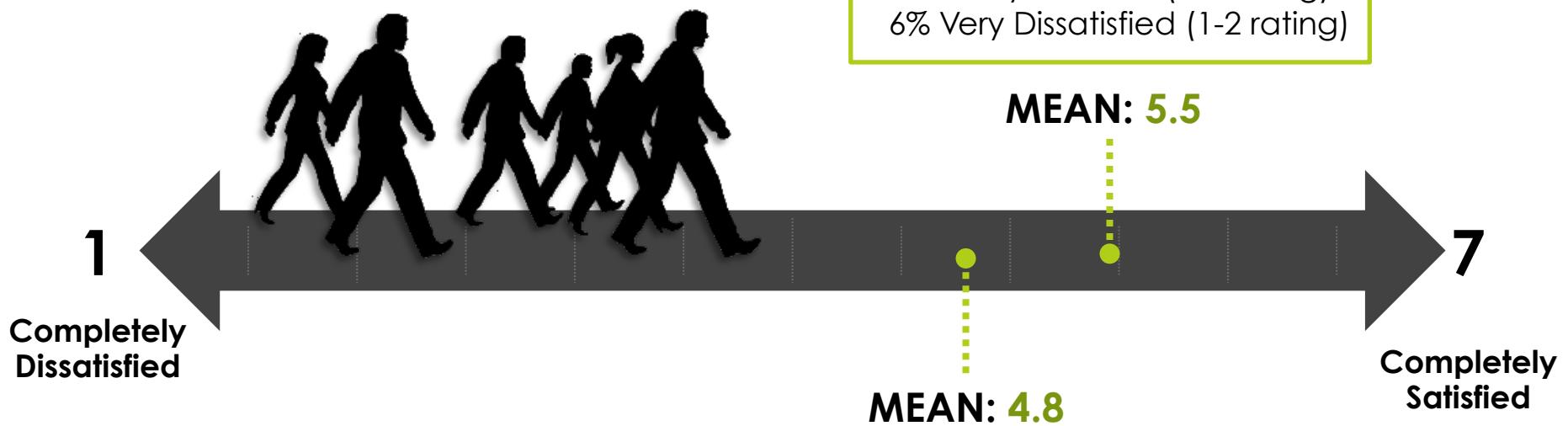
5

Americans may be classified into 1 of 7 health journeys.



6

Healthfulness is a journey.



Healthful or healthy?

Health is increasingly about...

Balanced diet

vs.

Being on a diet

An active life

vs.

An active gym membership

Nutrition

vs.

Medication

Personally directed

vs.

Provider-directed

Continuum of behaviors

vs.

Episodic outcomes

Emotional satisfaction

vs.

Rational metrics

Being healthful

vs.

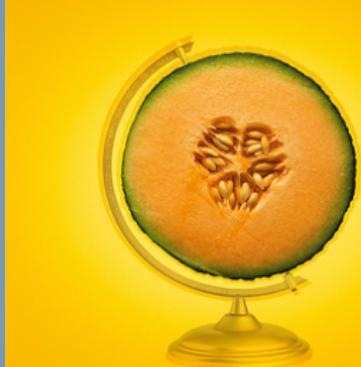
Healthy being

Marketing healthful.



Kaiser Permanente. Thrive

THINK GLOBALLY. SNACK LOCALLY.



KAISER PERMANENTE **thrive**

Get your snack on with locally grown, organic food from the farmer's market. It's never been so delicious! Visit kp.org and click on "Healthy Living" to learn more.



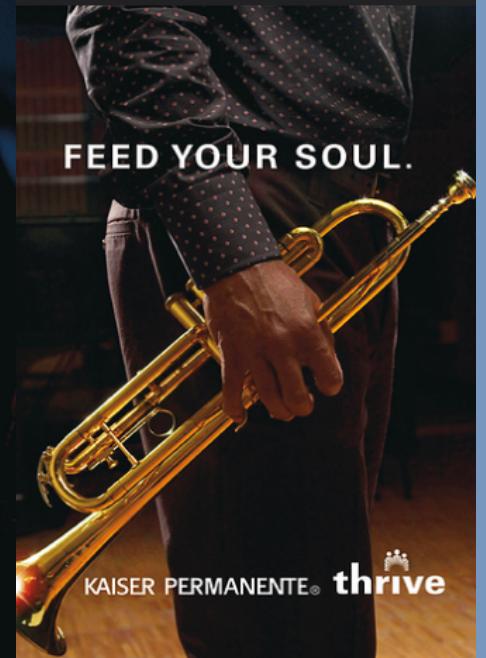
Make today the day you take the stairs. Because while you're on your way up, you'll be helping bring your cholesterol and blood pressure down. And no matter where you're going, the stairs will always take you to a far healthier place. For more ways to fit safe and sensible exercise into your day, just visit kp.org/thrive

KAISER PERMANENTE **thrive**

FEED YOUR MIND.



FEED YOUR SOUL.



KAISER PERMANENTE **thrive**



Fitbit

Track your fitness, day and night.
Steps are just the beginning.



ACTIVITY

Track everyday activity like steps, distance, calories, stairs climbed, and active minutes.



FOOD

Log your food with Fitbit's online tools and mobile apps to get a more complete view of your health and fitness.



WEIGHT

Use the Aria WI-FI scale to stay connected to your weight, BMI, and % body fat over time.



SLEEP

Measure how long and how well you sleep. Wake up in the morning with a silent wake alarm.



Quality outcomes for all—but those outcomes aren't just clinical if you want to compete.



The very young and healthy are self-sufficient, the chronically ill are care-reliant—the competition is for transitional consumers who are contemplating long-term health and looking for their partner of choice on the journey.



Speak to aspirational outcomes—control, life enjoyment and self-preservation.



Treatment as **part** of pathway to aspirations—knowledge, guidance, encouragement, confidence, support.



Recognize self-agency: be a valued navigator; its partnership, not paternalism.



Demonstrate your comprehensive approach to healthfulness.



Move from a health provider to a healthfulness navigator and provider.



Provide confidence that you can deliver as a valuable partner in individual and community healthfulness.



Discussion



**Finding the people who
should find you.**



47

The screenshot shows the WebMD website homepage. At the top, there's a navigation bar with links like "Admin Stuff", "Shopping", "Religious School", "Apple", "News", "Padding", "Bike", "House Remodel", "Read Later", "bily", "Wesleyan Chr...", and "MaxPreps". Below the navigation is the WebMD logo and a search bar with options for "Symptoms", "Doctors", and "Health Care Reform". There are also links for "Sign In", "Sign Up", and "Subscribe", along with social media icons for Facebook, Twitter, and Pinterest.

The main banner features a headline "Osteoarthritis of the Knee?" and a sub-headline "3 Signs It's Time to Change Your Treatment". A "Learn More Now" button is visible. To the right of the banner is a photo of a person's knee.

A large image of a calendar page with a red circle around the date "15" is displayed. Below this, a section titled "Will You Die by 2020?" discusses an online test for predicting risk of death.

The "Top Stories" section includes a story about "Viagra for Women" and "Libido Pill Recommended by FDA Advisors", accompanied by a photo of a woman holding a small white pill.

Other stories include "A Pound of Weight Gain on a Single Plate?", "Gut Bacteria May Influence Brain, Mood", "BPA Still in Many Canned Foods", "Expert Panel: Mammograms in 40s Have Less Benefit", "Study: Pesticides Linked to ADHD", "Type 2 Diabetes a Shield Against ALS?", and "Preventive Care: More Free Services".

To the right, there's a sidebar with a photo of a woman, a link to "Sitting Disease: Simple Ways to Avoid Serious Problems" by Arefa Cassoobhoy, MD, and other articles like "Too Young to Be in Public Alone?" and "Salt Harms More Than Just Blood Pressure".

An advertisement for "Frequent Hard or Lumpy Stools with No Known Cause?" featuring a traffic light is shown, with a call-to-action button "Get the Facts about a Prescription Treatment That Works Differently »".

The "Trending Topics" sidebar lists: Transgender, Heat Stroke, Spinal Stenosis, Sun Poisoning, Potato Salad, CrossFit Workout, Asperger's, and Serotonin.



Outreach vehicles: What you're already doing, community outreach, public relations and digital advertising.



Digital platforms help you reach people by aspiration, not just by demographic type.



Break out work



- Groups of 2-3
- Define your marketing objective
- Develop your *healthful* strategy
- Design a priority tactic/initiative that applies the strategy to your local market
- Share with the larger group

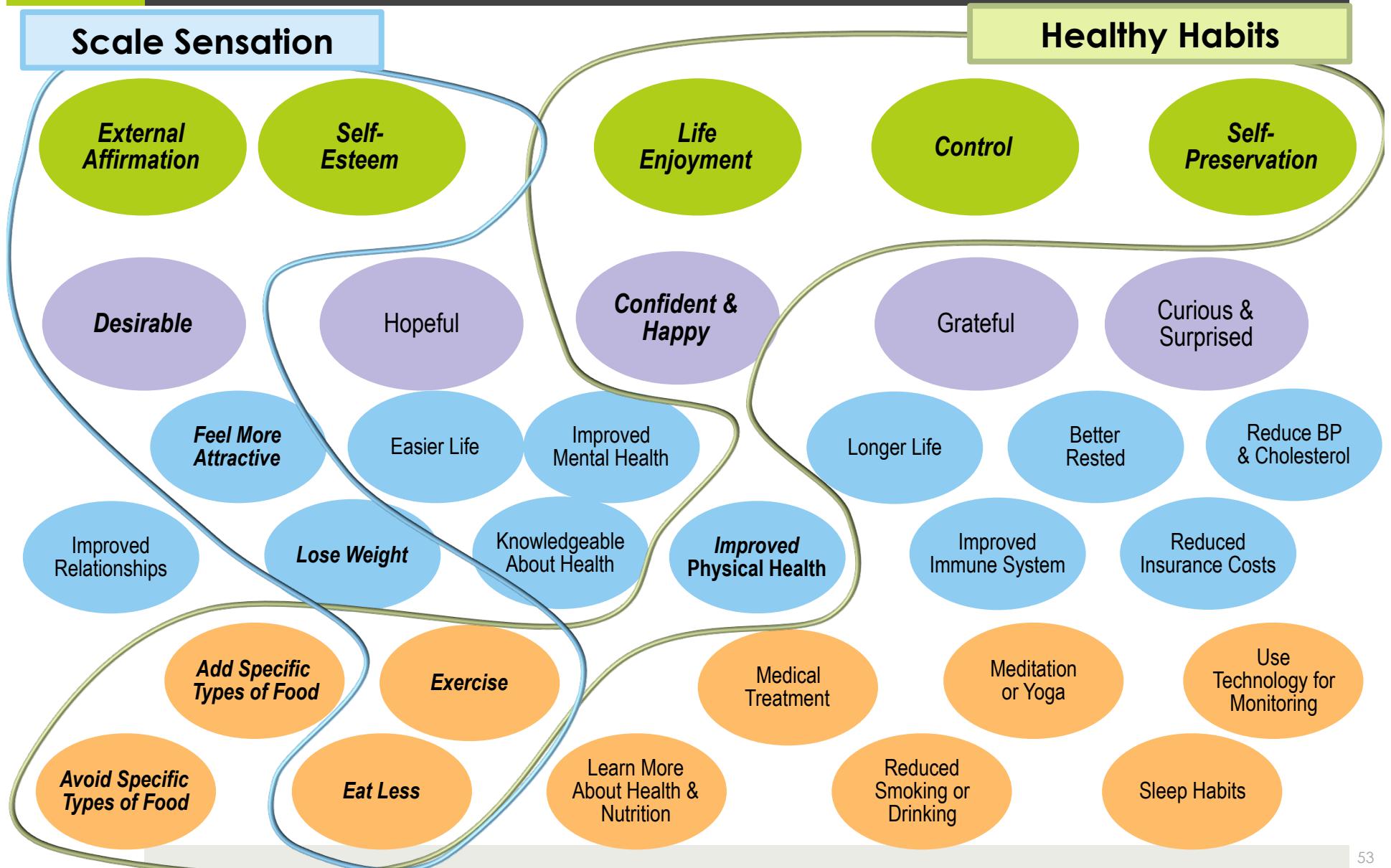


- Healthfulness is a self-directed aspiration to gain fulfillment from living an active, enjoyable and long life through balanced nutrition, exercise and healthy behaviors.
- Healthfulness is a proactive strategy to avoid the need for health care.
- Health care is embraced by healthful people when it helps them achieve their aspirations.
- Choose healthful as message frame and you'll become a provider of choice to all.
- How do you empower people and communities to be healthful?



4

Top health orientations.



Review & summarize



Thank you

