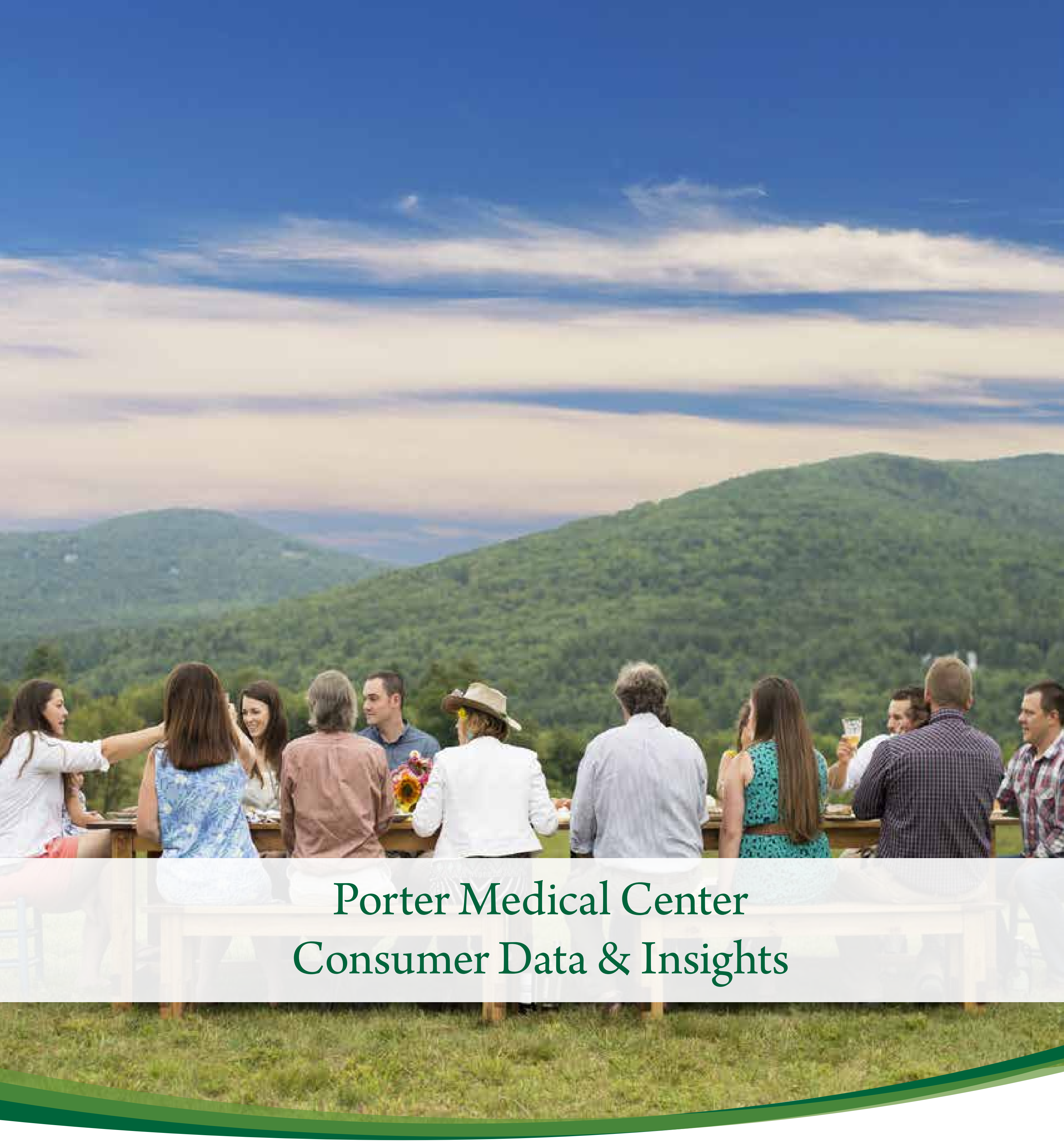


Porter Medical Center Consumer Data & Insights

THE
University of Vermont
HEALTH NETWORK
Porter Medical Center

May 2017

Introduction

Intelligence has been analyzed from a robust dataset composed entirely of self-reported information. This data will be used to describe the Porter Medical Center service area in Addison, Vermont.

Patient-reported outcomes are of increasing importance in the United States health care system. As consumers of the health care industry, patients want to have a say in all aspects of their health, from what doctor they see to how their treatment affects their quality of life. As patient satisfaction scores and value-based purchasing become central to reimbursement, meeting the needs of patients as consumers is key to being a successful provider in health care reform's present and future. With patient-reported information including patients' health and well-being, everyday life, habits, and beliefs, we can gain a better understanding of their preferences and how their needs can be met on a holistic level. This community overview utilizes CentraForce Health's Community[2] data and insights. All of the PMC data reflected is *within* a +/-3% margin of the UVMHN data. Percentages that are *outside* of the window will be noted by an *asterisk* (*) for **-3%** and a *caret* (^) for a **+3%.**

TABLE OF CONTENTS

Demographics... 4

Lifestyle .... 5 - 6

Health and Wellness ....7 - 8

Health Care Providers 9

Media, Communication & Technology...10 - 11

Consumer Data & Insights Takeaways 12

Consumer Data & Insights Recommendations 13

Demographics

56% agree that how they spend their time is more important than how much money they make.

95% identify as white and 50% are married. This population is older with **49% being 50+ years old**. 65%^ of the households are one or two person households and **65% of the households have no children under 18 in the household.** For those with children in the household, the children are older.

43%* of the market has a household income less than $50,000 per year. 46% of the market is employed full time. Because the market is older, 17% of the non-employed are retired. How they spend their time is more important than how much money they make. Only 18% agree that money is the best measure of success and 47% are happy with their current living standards.

DEMOGRAPHICS

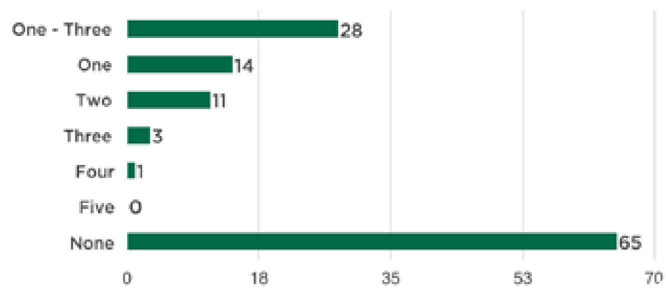
Age	%Population
18-34	29%
35-49	22%
50-64	29%
65 and Older	20%

Race	%Population
White	95%
Other	3%
Black or African American	2%
Asian	1%

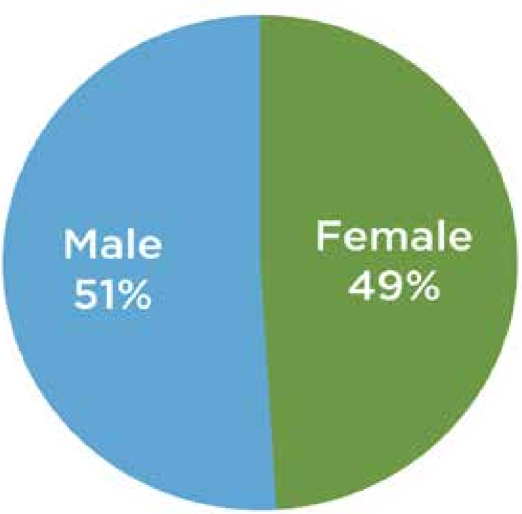
Marital Status	%Population
Presently Married	50%
Never Married	33%
Divorced	12%
Widowed	5%

65% of the households have no children under 18 in the household

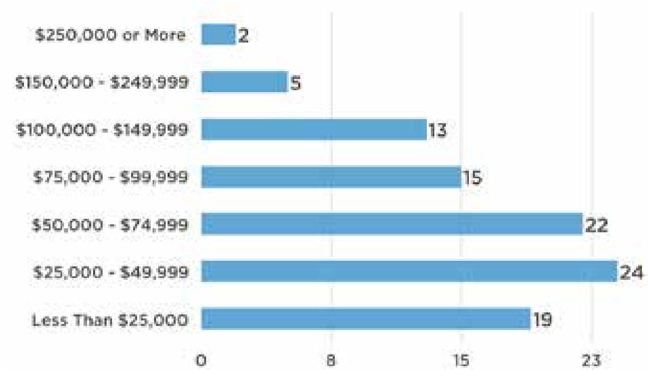
NUMBER OF CHILDREN (IN THE HOUSEHOLD)



31% have an education level through high school and 27% attended special, tech or vocational school.



HOUSEHOLD INCOME



Lifestyle

Porter Medical Center consumers consider themselves to be trustworthy, competent and reliable as well as kind, good-hearted, warmhearted and sincere.

Over 79%^ feel it is important to continue to **learn new things and to be well-informed.** They like to feel respected by their peers. 61%^ are willing to volunteer for a good cause. It is important to them that companies act ethically.

Family and home life rates highly among PMC consumers with **80% enjoying spending time with their family. 70% say that family life is the most important thing to them and 62% prefer to spend a quiet evening at home rather than go out.** More than half like spending most of their time at home with their family. At home, their favorite activities are grilling/outdoor cooking, lawn care and gardening (flowers or vegetables).

PMC consumers are ***not*** early adaptors. They are average impulse shoppers, average brand loyalists and average users of the internet to research and gather information. Additionally, they score below average as an active health information source for others and their willingness to try new health and nutrition products.

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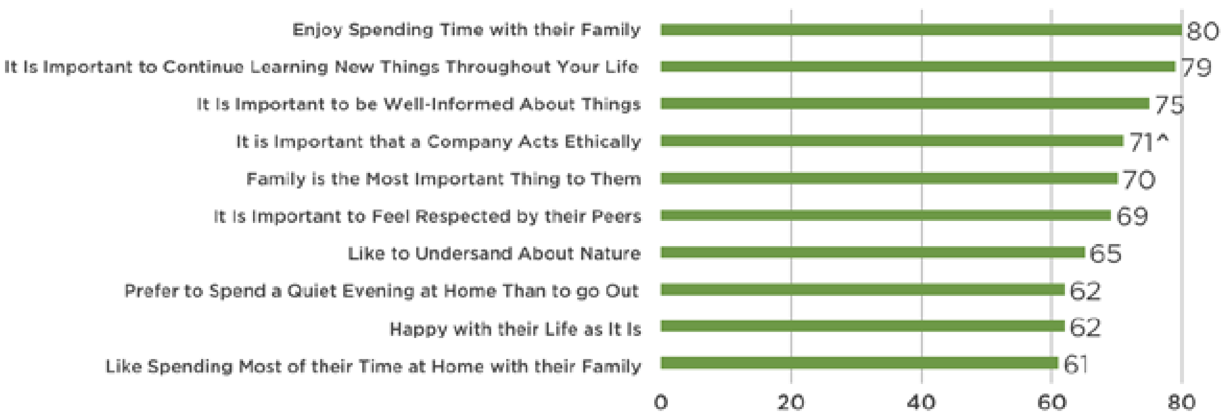
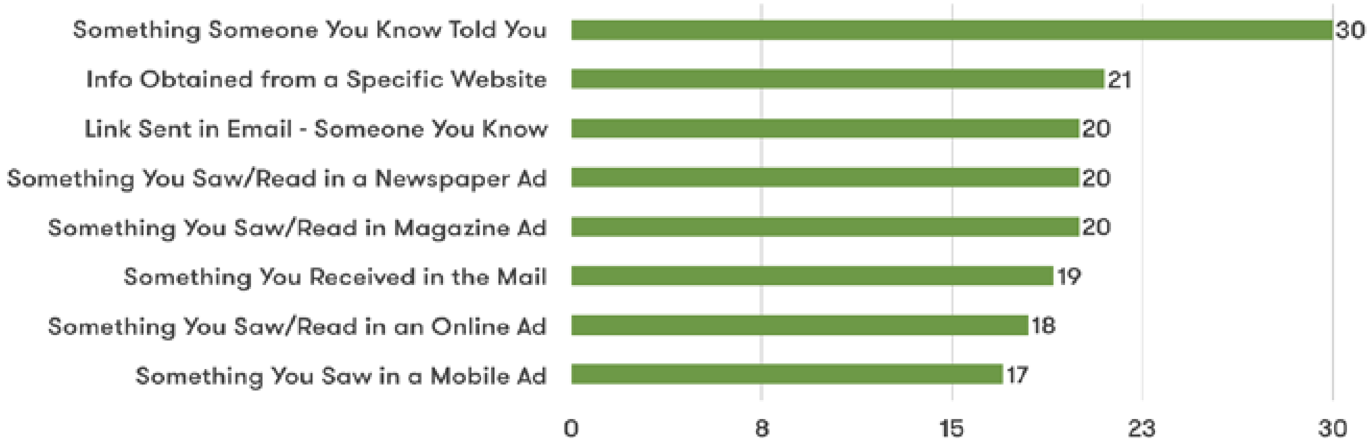
GENERAL ATTITUDES



Purchase decisions are highly influenced by **information from someone they know** – either in one-on-one conversation or by an email link. Consumers also report purchase decisions influenced by advertising including TV, radio and magazine as well as information sent via email from an advertiser.

PURCHASE DECISION HIGH INFLUENCERS



47% prefer to eat foods without artificial additives

26% look for organic or natural food products

46% make an effort to buy locally grown foods

60% are trying to eat healthier. Over half of the population likes to try new recipes and they prefer simple, easy to prepare foods. They look for the freshest ingredients to cook with. 47% prefer to eat foods without artificial additives. 46% make an effort to buy locally grown food and 26% look for organic or natural food products. They admit to indulging in fattening food from time to time.

They like the trend toward healthier fast food and 38% have eaten at McDonald's in the past 30 days. 64% snack between meals and 60% agree most snacks that people eat are not healthy. 49% believe that breakfast is more important than lunch or dinner. 61% believes everyone should age naturally and 84% feel they have some/most of the control over their health. 66% are motivated to maintain or improve their health to live a longer life, compared to 39% of the population whose motivation is to look good.

*66% are motivated to maintain or improve their health to **live a longer life,** compared to 39% of the population whose motivation is to look good.*

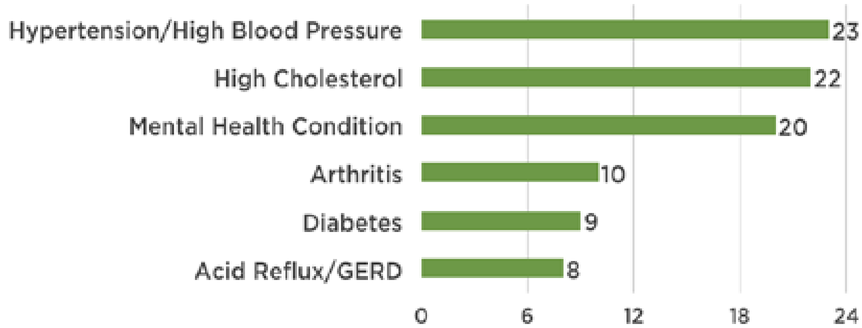
43% pay their bills by mail with payment by check as the top form of payment. 48% have used none or one credit card in the last three months. 89%^ more of the market has a checking account, a saving account and a debit/ATM card.

Health and Wellness

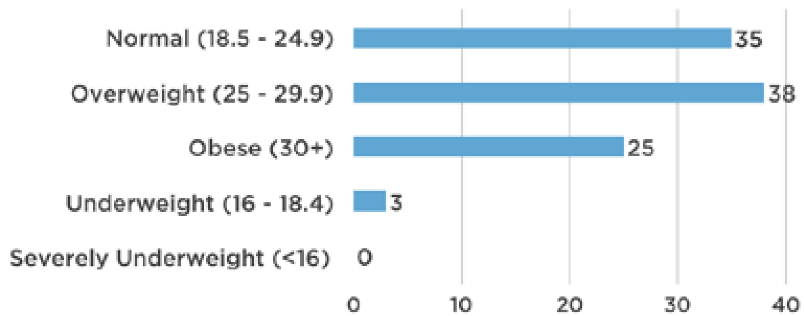
Only half of the market believes their health is excellent or very good – majority believe it is good.

Among PMC consumers, **23% have diagnosed hypertension/high blood pressure, 22% have diagnosed high cholesterol and 20% have a mental health condition,** far and away the highest conditions in the market. Arthritis, diabetes, and acid reflux/GERD also emerge.

CONDITIONS AND TREATMENTS
(Professionally Diagnosed)



BMI



63% are overweight or obese

63% are overweight or obese and 71% report that their current health is about the same as it was a year ago. **Only half of the market believes their health is excellent or very good** – majority believe it is good. Almost half (44%) of the service area feels very or somewhat stressed. **21% feels that their current stress level is higher this year than it was last year.** Yet, 58% report they are optimistic about their future health.

Consumers have sought treatment for the following conditions:

- 40% cold/cough/flu
- 31% non-migraine headache
- 26% allergies
- 20% pain
- 18% sinus congestion/sinus headache

All of the above were primarily treated with OTC medications. 58% of the market reports trying to remedy their illness with a non-prescription medicine before seeing a doctor.

66% agree that non-prescription store brand drugs work as well as advertised brands. 61% only use drug brands that are recommended by their physician. Insurance coverage for all their prescriptions is very important.

PMC consumers enjoy fitness walking and exercise. 74% have exercised at least once in the past week and 46% have exercised regularly in the past 12 months. Yet 31% say it's easier to find an excuse not to exercise than to get out and do something."

Generally, **only about a third of the service area does any form of research about their health care including different treatments and options or educating themselves to be better informed.** If they do any research, it is done *before* seeing their doctor so they can ask he/she about it.

Before seeing the doctor:

- **31%** research treatment options on their own then ask their doctor about it

After seeing the doctor:

- **45%*** do what their doctor tells them to do
- **Only 13%** conduct an online search about a condition
- **Only 10%** conduct an online search about a drug or treatment

52% believe in preventative health care and 61% believe it's important to get an annual exam. They back-up their beliefs with actions as **66% have had an annual exam in the last year and 61% report an excellent or very good relationship with their PCP.** In addition to annual exams with their PCP, they are also seeing their eye doctor (either ophthalmologist or optometrist), GYN, dermatologist and cardiologist.

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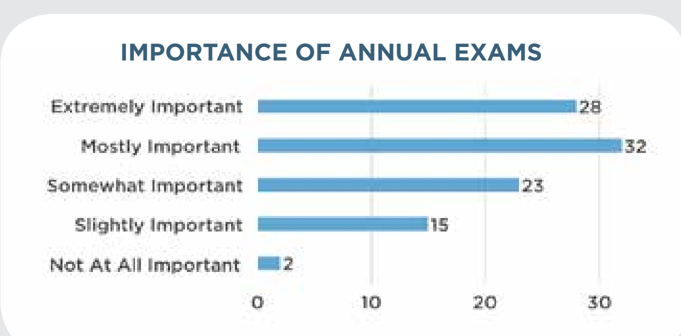
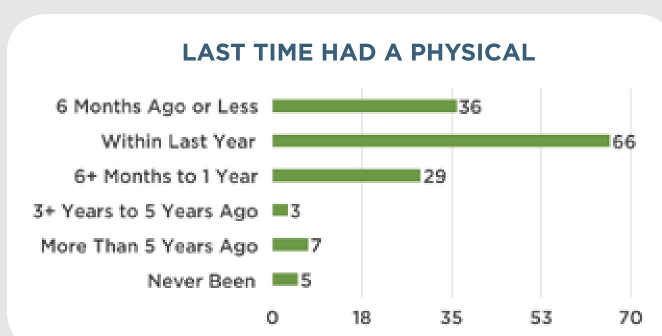
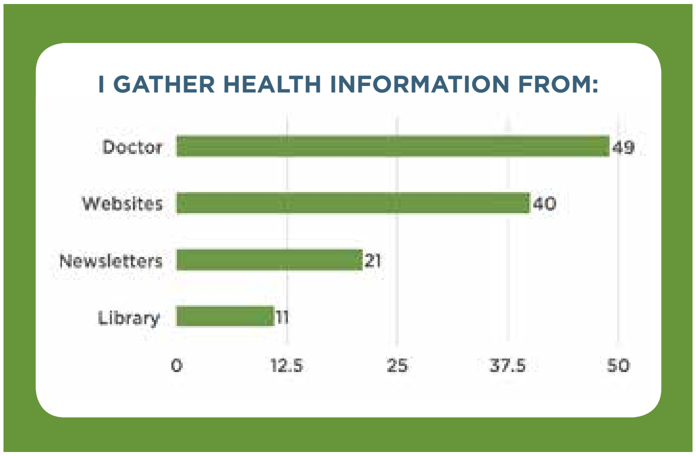




Health Care Providers

Doctors are seen as an authority for health care information in the PMC service area.



85% are more comfortable talking about health and wellness face-to-face rather than online

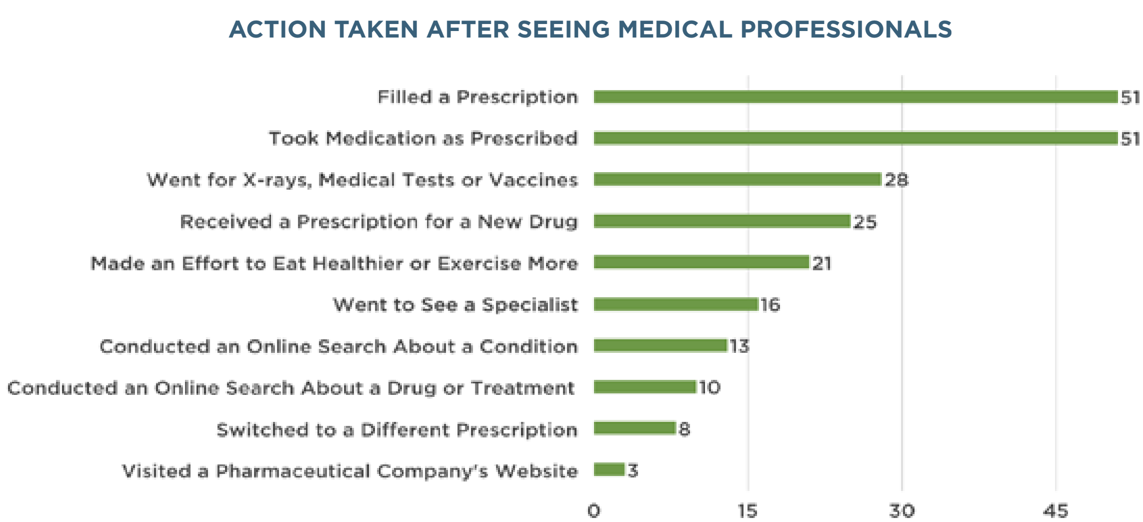
46% are more likely to visit a health website that was recommended by a doctor or that they saw in a doctor's office

32% are willing to use a mobile app recommended by a doctor

Doctors are seen as an authority for health care information in the PMC service area. Consumers (49%) rely on physicians when they gather health care information and 68% place a high value on their doctor's insight. 85% are more comfortable talking about health and wellness face-to-face rather than online so the in-person interaction with their doctor is of high importance. After seeing a medical professional, 45%* do what their doctor tells them to do. Additionally, 46% are more likely to visit a health website that was recommended by a doctor or that they saw in a doctor's office. 32% are willing to use a mobile app recommended by a doctor.

70% trust their doctor to recommend vaccines essential to their continued health.

Once Porter Medical Center consumers have seen a medical professional, they fill the prescription, take their medication and do what their doctor tells them to do. **55% expect the treatment their doctor prescribes to work.**



Media, Communication & Technology

37% of PMC consumers turn to the internet first
when they need health care information.

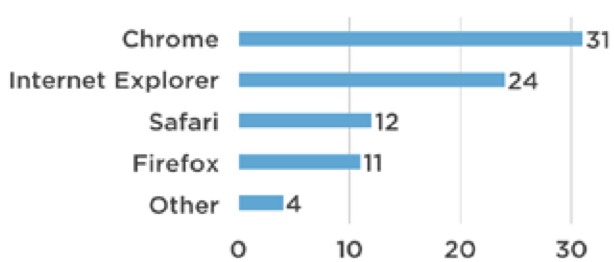
Traditional Media

Television is both a source of information and entertainment for PMC consumers. The top four most recently viewed television shows in the market are all on CBS. Favorite cable channels include History, HGTV, Discovery, and The Food Network. 49% are usually involved in another activity when watching television. More than half the population values the local newspaper and listens to the radio in their cars.

Internet

For 62% of PMC consumers, the internet has changed the way they get information about products and services. Specifically for health care, **46% agree that the internet provides them with a wealth of resources when searching for health/ wellness information and 37% of PMC consumers turn to the internet first when they need health care information. 33% agree that online videos help them understand complicated subjects**. Over half of the population is cautious about which websites they turn to for health information and many feel there is a risk when providing personal health information online. Chrome is the most used internet browser in the PMC service area.

INTERNET BROWSERS (MOST USED)



TOP PICKS IN A WEEK - (Over Last 12 Months)

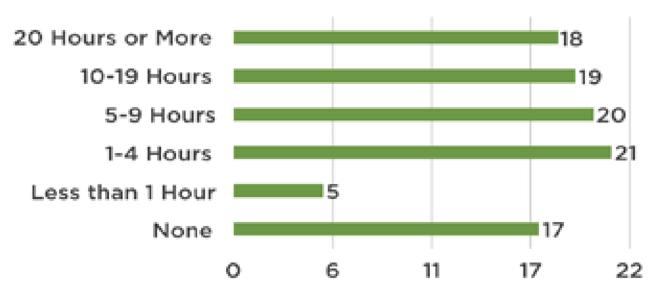
Cable Programs

- American Pickers, History (17%)
- Pawn Stars, History (14%)
- Property Brothers, HGTV (12%)
- Alaska – The Last Frontier, Discovery Channel (12%)
- Diner, Drive-Ins & Dives, The Food Network (11%)
- Chopped, The Food Network (10%)
- The Walking Dead, AMC (10%)
- Alaskan Bush People, Discovery Channel (10%)
- Shark Tank, CBNC (8%)

TV Programs

- The Big Bang Theory, CBS (18%)
- NCIS, CBS (12%)
- 60 Minutes, CBS (10%)
- Criminal Minds, CBS (10%)
- Dancing With the Stars, ABC (10%)
- Modern Family, ABC (10%)
- Blue Bloods, CBS (9%)
- Law & Order SVU, NBC (9%)
- America's Funniest Home Videos, ABC (9%)

TIME SPENT ON THE INTERNET (IN A WEEK)



Social Media

57% of PMC consumers use social networking websites. Facebook is the most frequently visited with 59% having visited in the past 30 days. **Primary usage is to keep in touch with family and friends.** Social media is rarely used as an information, recommendation or purchasing influencer source, with 61% not trusting medical information other people share on social media. 66% spend less than an hour a day on social media -- including 35% who don't use it at all. Users are more passive and prefer to read comments than post their own. Only 30% report enjoying posting content on their social sites.

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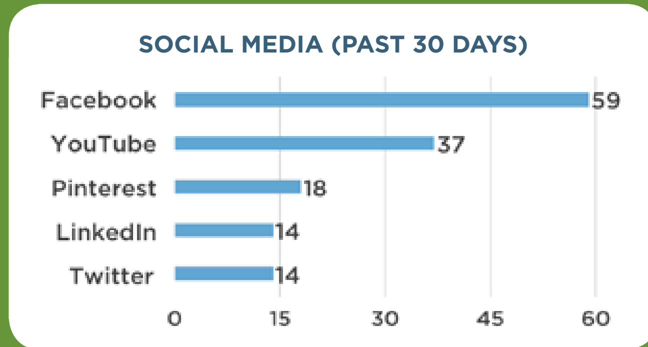
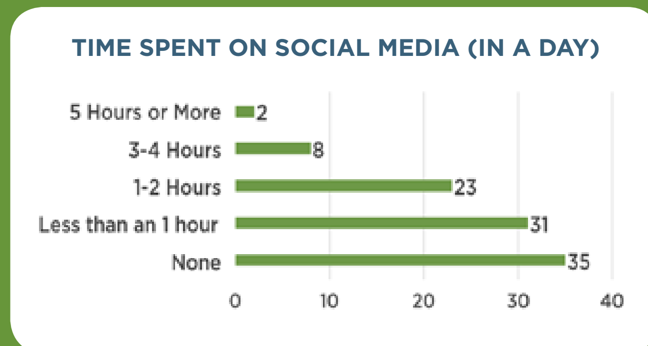
Mobile and Technology

68% of the population currently uses a smartphone with the predominant operating systems being Android and iOS. **75% use their phones to text and 62% use their cell phones to access the internet.** Consumers also own additional technology devices including tablets (53%) and laptops (67%).





MOBILE + TECHNOLOGY

Smartphone	%Population
Yes	68%
No	25%

Wireless Carrier	%Population
Verizon	41%
AT&T	20%
Sprint	7%
TracFone	6%
T-Mobile	5%

Tech Devices Currently Own	%Population
Smartphone	68%
Laptop or Notebook	67%
Tablet	53%
Desktop Computer	51%

Consumer Data & Insights Takeaways

- Because the market skews older and much of the service area includes rural areas, many of the data points support these facts – including lifestyle findings and traditional interactions with health care providers.

- PMC consumers will not be the first to adapt to new technology, devices or the latest gadgets. Change will come slowly (if at all) as they are neither spontaneous nor impulsive.

- Even in an era of health care consumerism, the doctor remains the health care authority. As active consumers, they will place the highest value on information from a medical professional.

- The market data indicates consumers who may be at risk for future health issues, particularly related to cardiology – obesity, hypertension/high blood pressure and high cholesterol.

- Much of the data points to consumers who take care of themselves – preventative medicine, healthy eating, aging naturally, etc.

- Traditional media still matters.
    - TV – lead source of entertainment
    - Radio – on in the car
    - Newspaper – valued for local news

- PMC consumers are accessing multiple digital devices.

- The market reflects more social media observers vs. active participants.
    - More reading, less posting
    - Utilized more for social than information
    - 66% = No social activity or less than an hour

- Recognize that the internet is a top source of information but not the most valued.

- Living a long, healthy life matters.

Consumer Data & Insights Recommendations

- Brands which are trustworthy, competent and reliable will prove to be attractive assets to PMC consumers. Making a claim and delivering strongly on the promise will endear the PMC brand to consumers.

- As life-long learners, consumers will be attracted to continuing education opportunities. Use initiatives that can pull consumers to the PMC brand -- both on-site and in the community. Place PMC doctors front and center, increasing visibility and accessibility to consumers.

- Build relationships with your consumers remembering that the best relationships involve two-way conversation. Loyalty can be built but it will have to be built with trust and sincerity.

- Data indicates consumers who are at-risk for future cardiology issues. Prioritize them as a target population health audience and study them in greater detail.

- Prioritize traditional face-to-face doctor-patient interactions, making access and customer service positive brand experiences.

- Optimization for all digital platforms is a must.

- Find the balance, balance, balance between traditional media and digital media in marketing initiatives.

- Being a trusted online source of information is important and can be increased in value to PMC consumers through credibility of information. Consider videos to increase consumer understanding. Use the website as an additional venue to showcase physicians.

- Push social content constantly, particularly where PMC or individual hospitals can be positioned as sources of authority and trust.

- Feature/show the benefits of living longer, i.e. grandchildren, travel, hobbies, etc.

- When encouraging exercise, consider messaging that rewards or entices. Consider combining exercise with learning.

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The heart and science of medicine.