

Gaps In Care Member Survey Analysis

Virgin Pulse, November 2018

Table of Contents

Slides 3-5: About This Survey

Slides 6-9: **Attending/Missing Screenings**

Slides 10-12: **Finding a Primary Care Physician**

Slides 13-14: **Beliefs Around Preventative Care**

Slides 15-16: **Hospitalization/Chronic Care**

Slides 17-23: **Scheduling Screenings/Reminders**

Slides 24-25: **Rewards-Driven Behavior**

Slides 26-33: **Security/Privacy**

Slides 34-38: Summary and Takeaways

TL;DR:

There is a **large addressable audience** for the Gaps in Care product expressed as preventative care reminders.

We need to **start messaging Virgin Pulse's move** towards being a healthcare company. People don't understand yet how the things we're working on fit into how they perceive us.

A **significant number of people have security concerns** that we can address with messaging and presentation.

Enough people really don't want this that an **opt-out (or making feature opt-in)** would be valuable for their peace of mind.

Survey Details

- Taken by 497 people on the Member Panel. Member Panel users are typically considered to be more engaged than the average user, and represent largely white-collar employees.
- 13 total questions on:
 - Visiting your doctor
 - How reminders work
 - Feelings around security/insurance data
- 2 open-ended questions on:
 - Beliefs around preventative care
 - Comfort with Virgin Pulse using insurer data

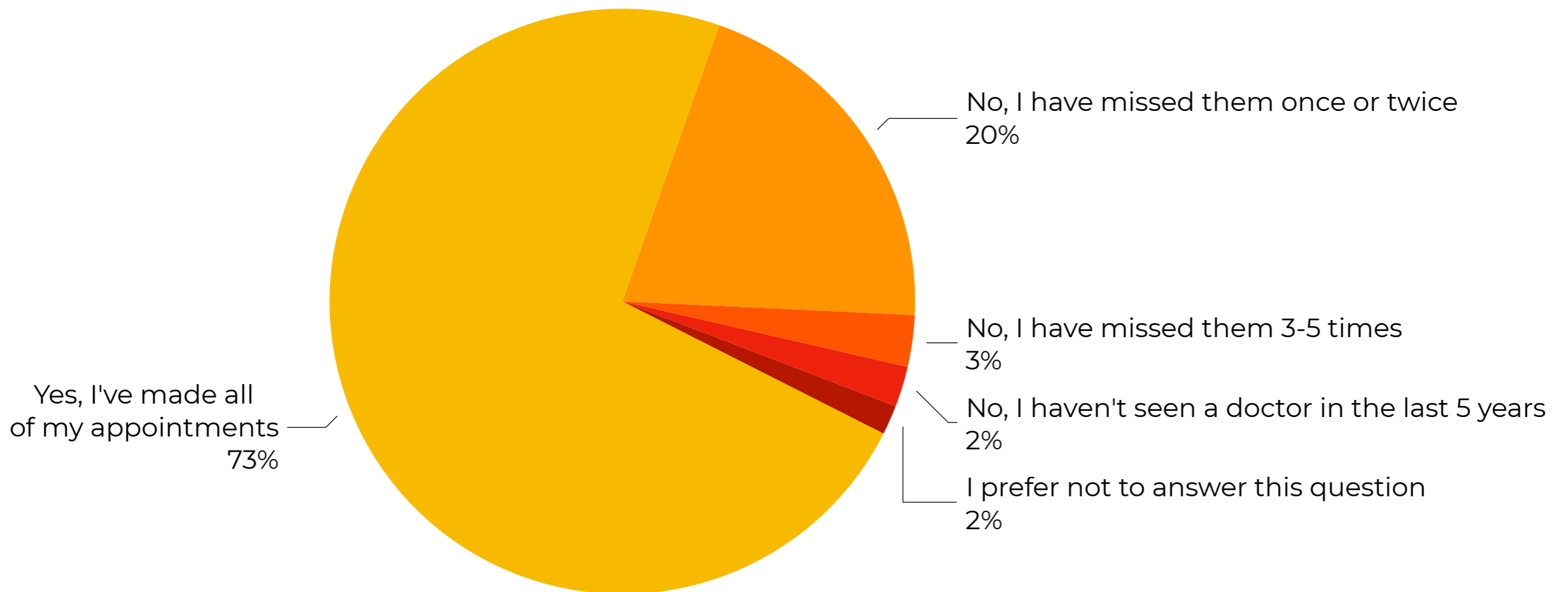
CAUTION!

This is a **small sample size**. These numbers should not be thought of as precisely representing our overall Member population. We don't know the margin of error. This should give us a **rough idea** of addressable audience.

Think of them as loose guidance. The results allow us to narrow in on certain themes that we can explore further, in interviews and in implementation and analytics.

Question 1:

In the past 5 years, have you been able to attend all your annual physicals and/or recommended screenings for any chronic conditions?

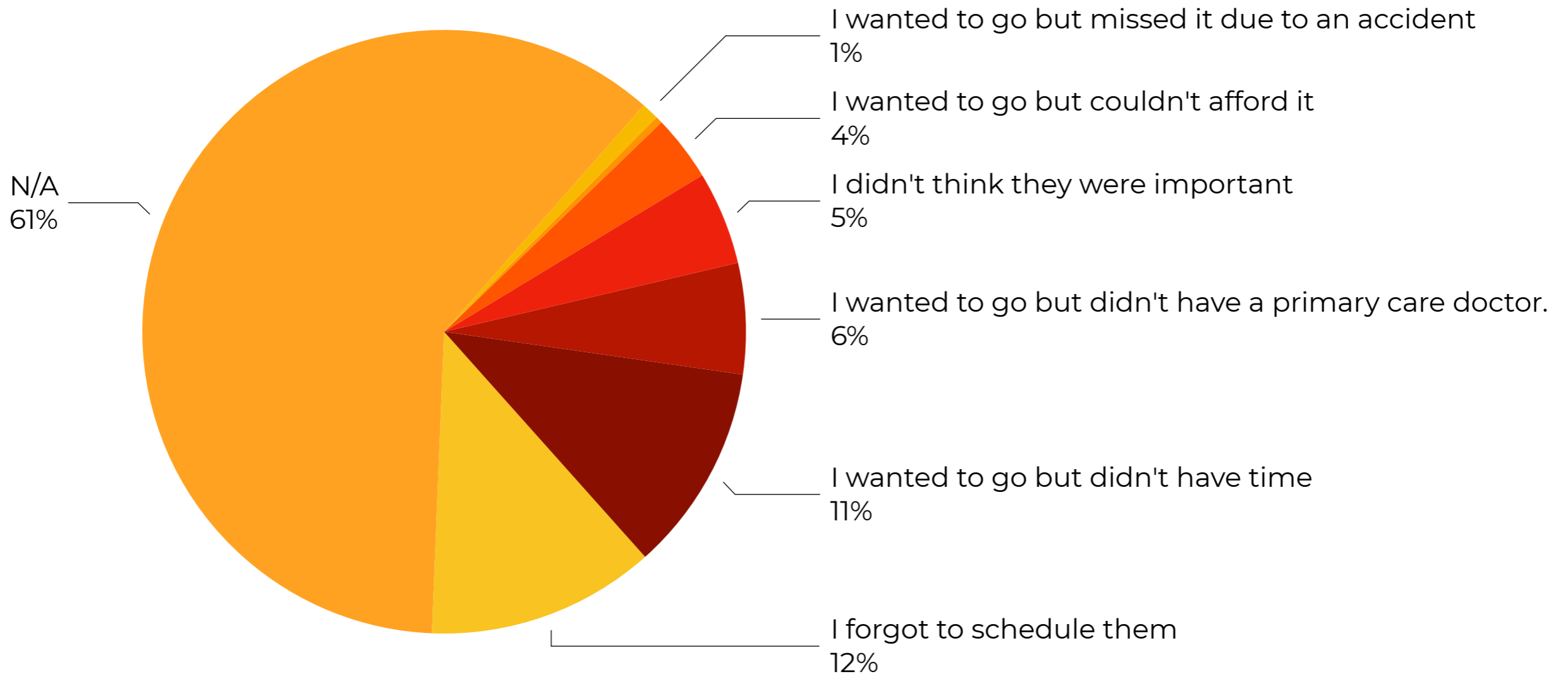


Question 1:

- ~75% (358) of surveyed Members claimed to make all their appointments.
- ~25% (125) claimed to have missed appointments.

Question 2:

Choose one or more of the following reasons why you were unable to make these screenings. (Select all that apply).

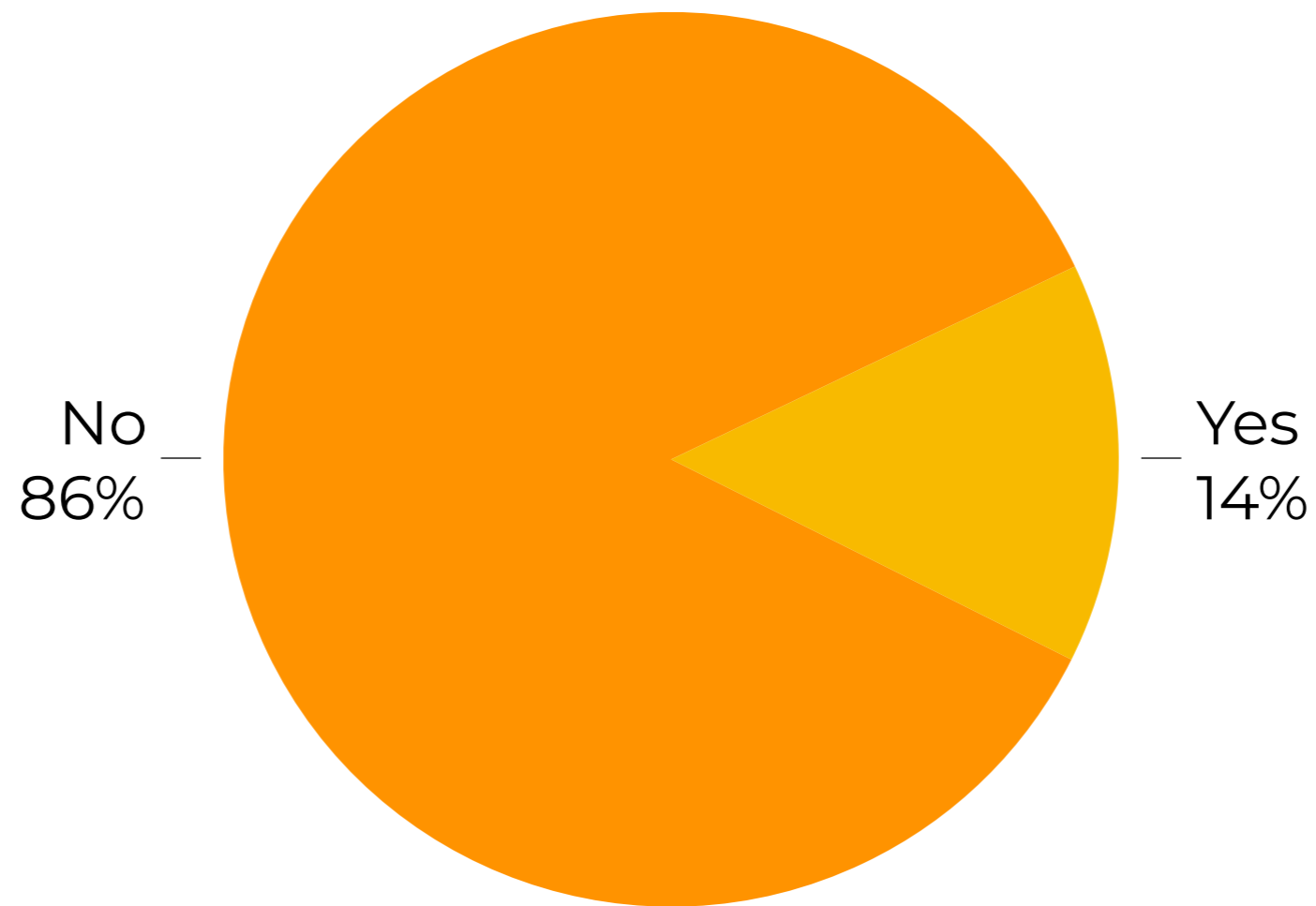


Question 2:

- 39% (193) of those surveyed gave reasons for missing appointments, which is more than the 25% (125) who admitted to missing appointments at all.
- 16% (79) missed appointments due to circumstances we could help with (forgot to go to, didn't think it was important).
- This supports our assumption that there is a **large addressable audience** of people that reminders could nudge towards healthier actions. They want to go to their appointments but admit to missing some.

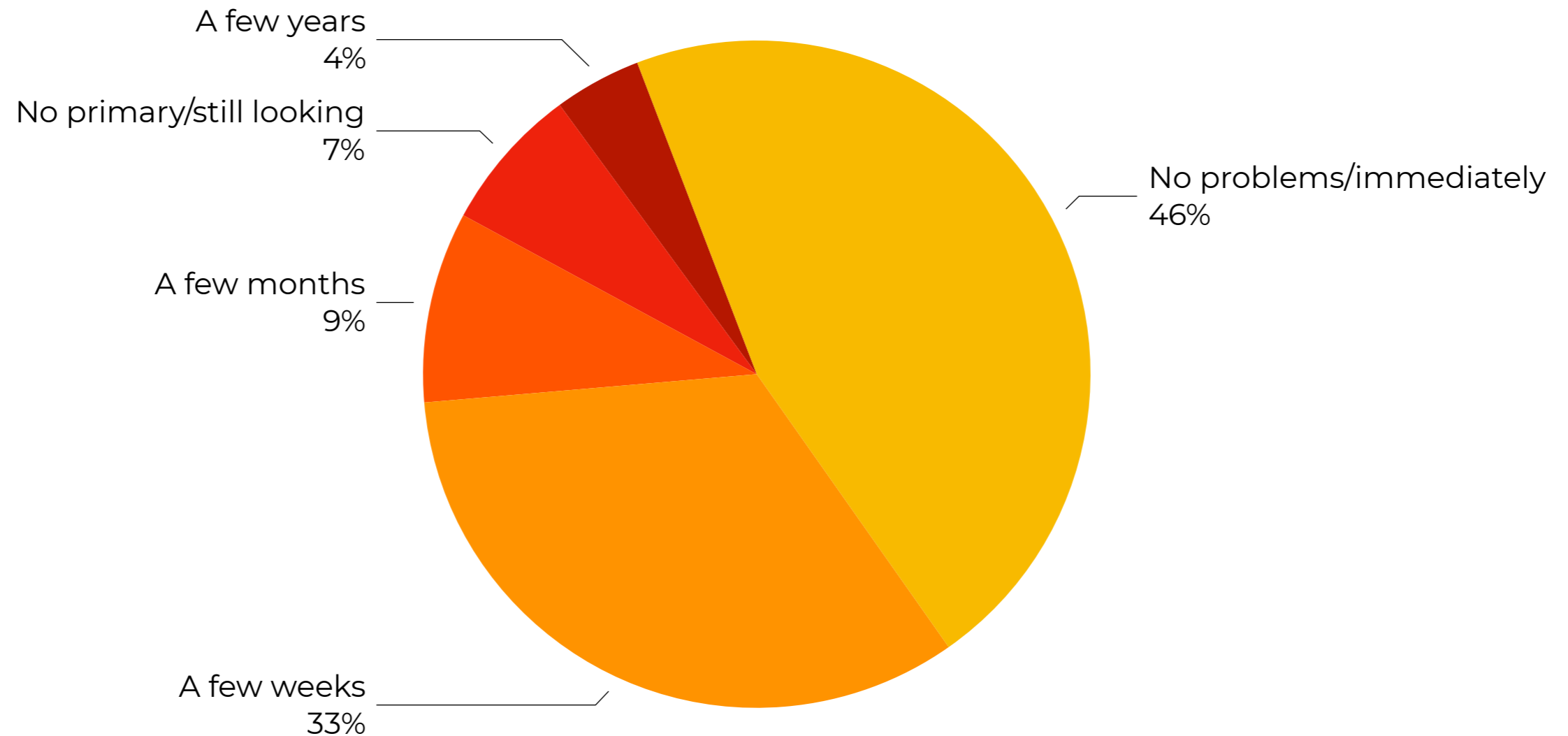
Question 3:

In the past 5 years, did you have trouble finding a primary care doctor?



Question 4:

How long did it take to find a primary care doctor?

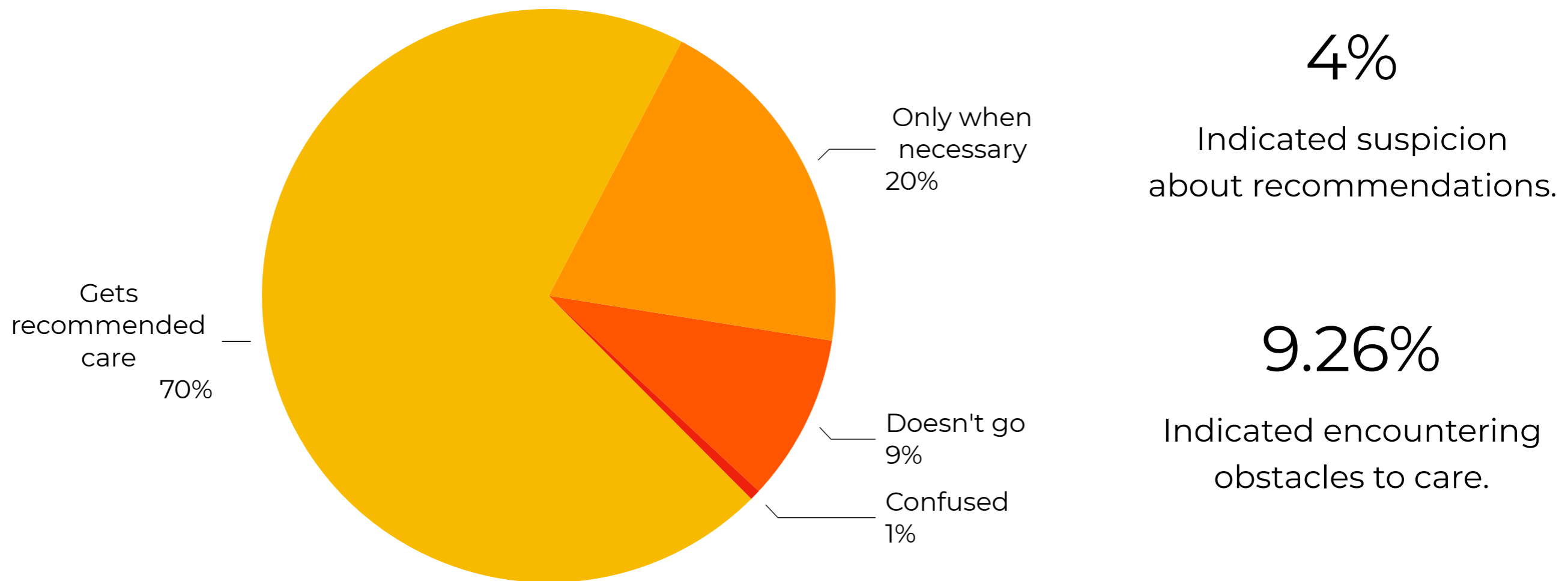


Questions 3 and 4:

- 14% (72) said they specifically had trouble finding a primary care doctor, but 20% (99) disclosed a significant period of time (months to years) looking for a primary.
- Perception of how long it ought to take, or asking the Member to reflect could account for the discrepancy.
- The benefits nav project could help here. We're assuming that **once a Member has a primary they will be more likely to take preventative care measures** as they'll have an expert in a position of authority setting up reminders for them.

Question 5:

Please describe your beliefs on needing to see a doctor as often as it has been recommended to you. Provide as much explanation as you're comfortable with.

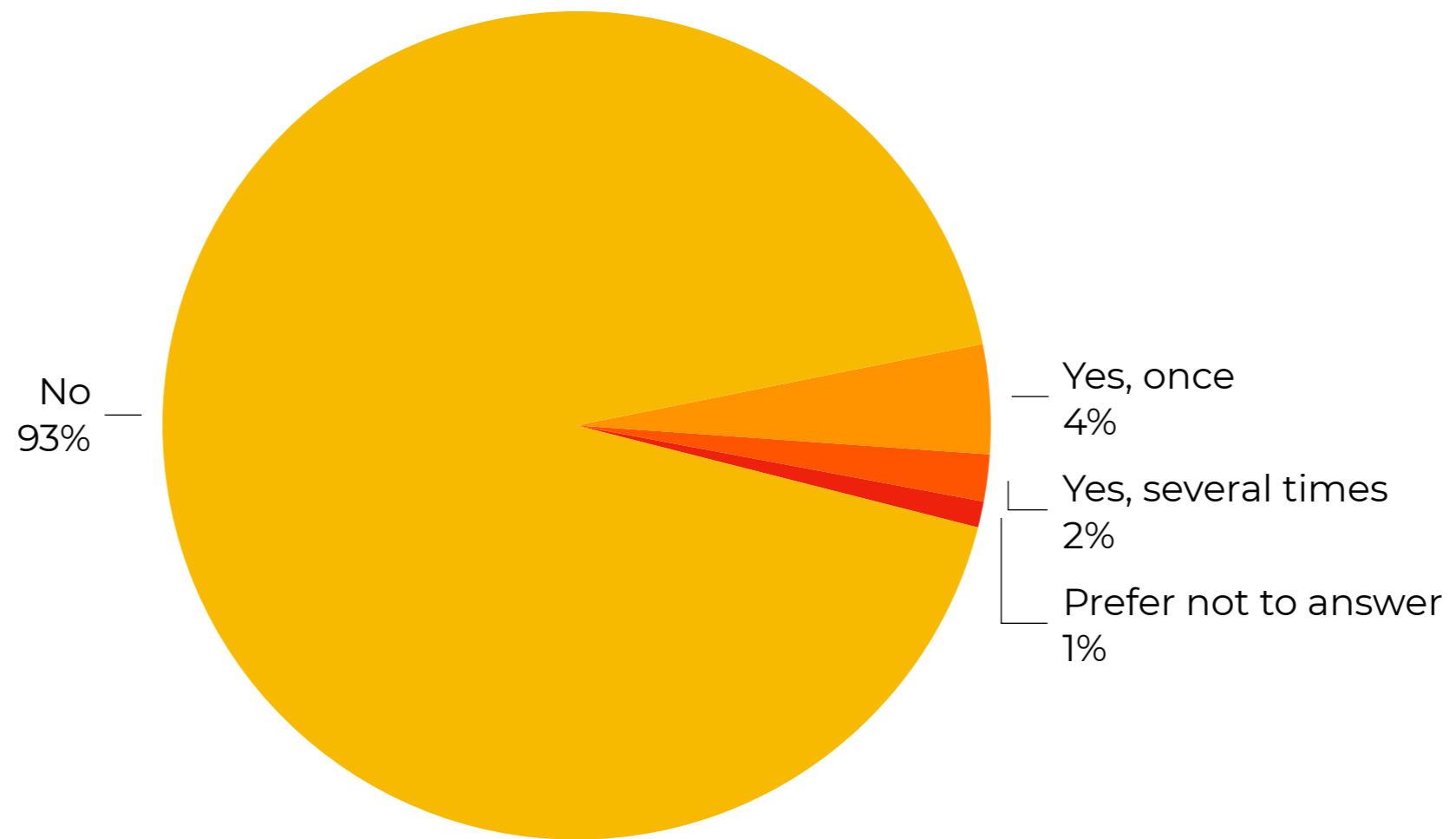


Question 5:

- 70% (350) of those surveyed indicated **they believe in getting the preventative care** their doctors advise. Nudges to act should be more effective with this group.
- 30% (149) either don't go to the doctor, only go when absolutely necessary, or are confused about what they should be doing.
- 4% (20) of people who gave either answer also said they were **suspicious of the recommendations** they were given.
- 10% (46) of the total also said they encountered obstacles (time, money, transportation) that **we can't directly influence**.

Question 6:

In the past 5 years, have you been hospitalized for any reason related to a chronic condition?

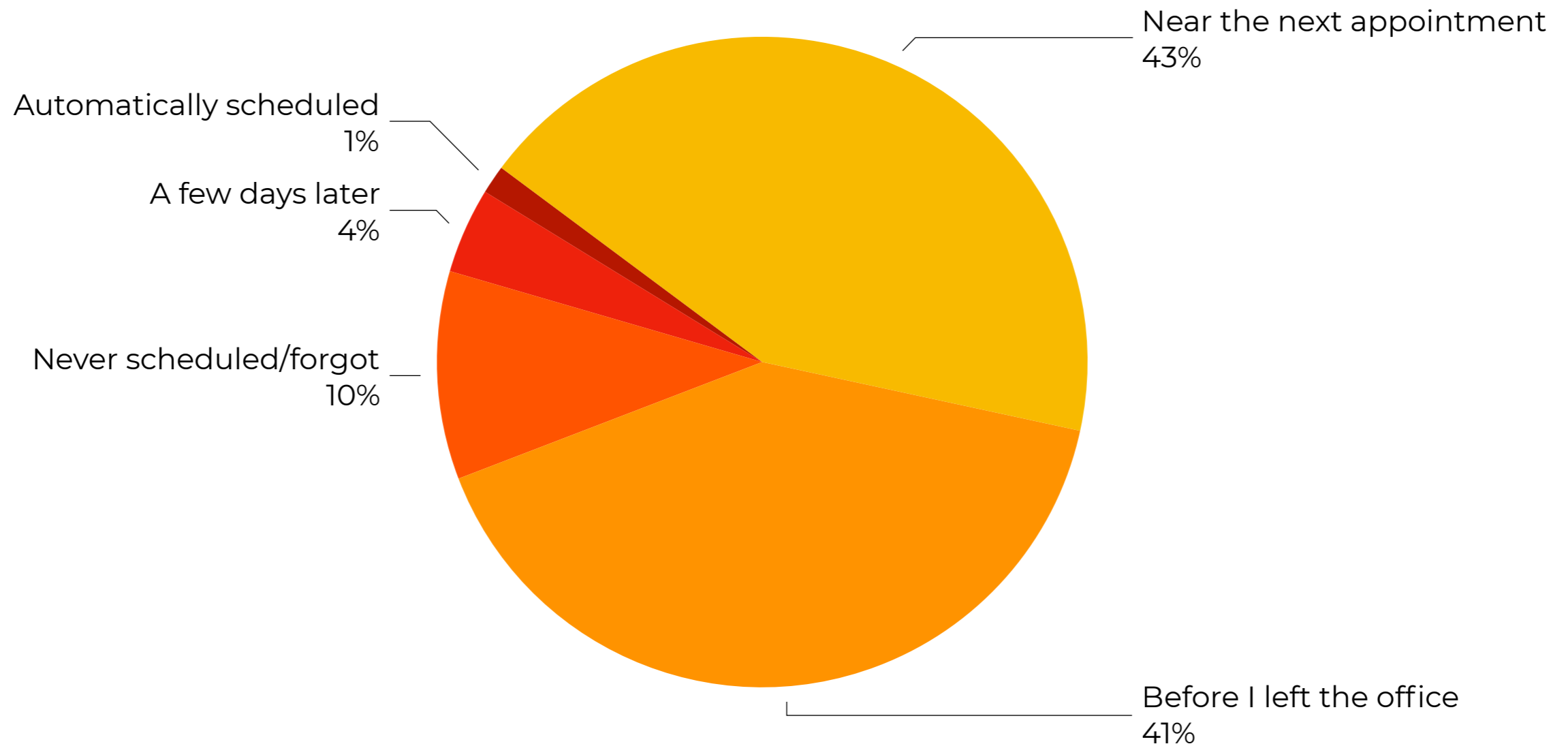


Question 6:

- There may have been a **flaw in this question**: we didn't define "chronic condition".
- With what we know about our Member Panel, and the flaw in the question, we shouldn't read much into this.

Question 7:

For the last screening you were able to attend, how long afterwards did you wait before you scheduled your next screening?

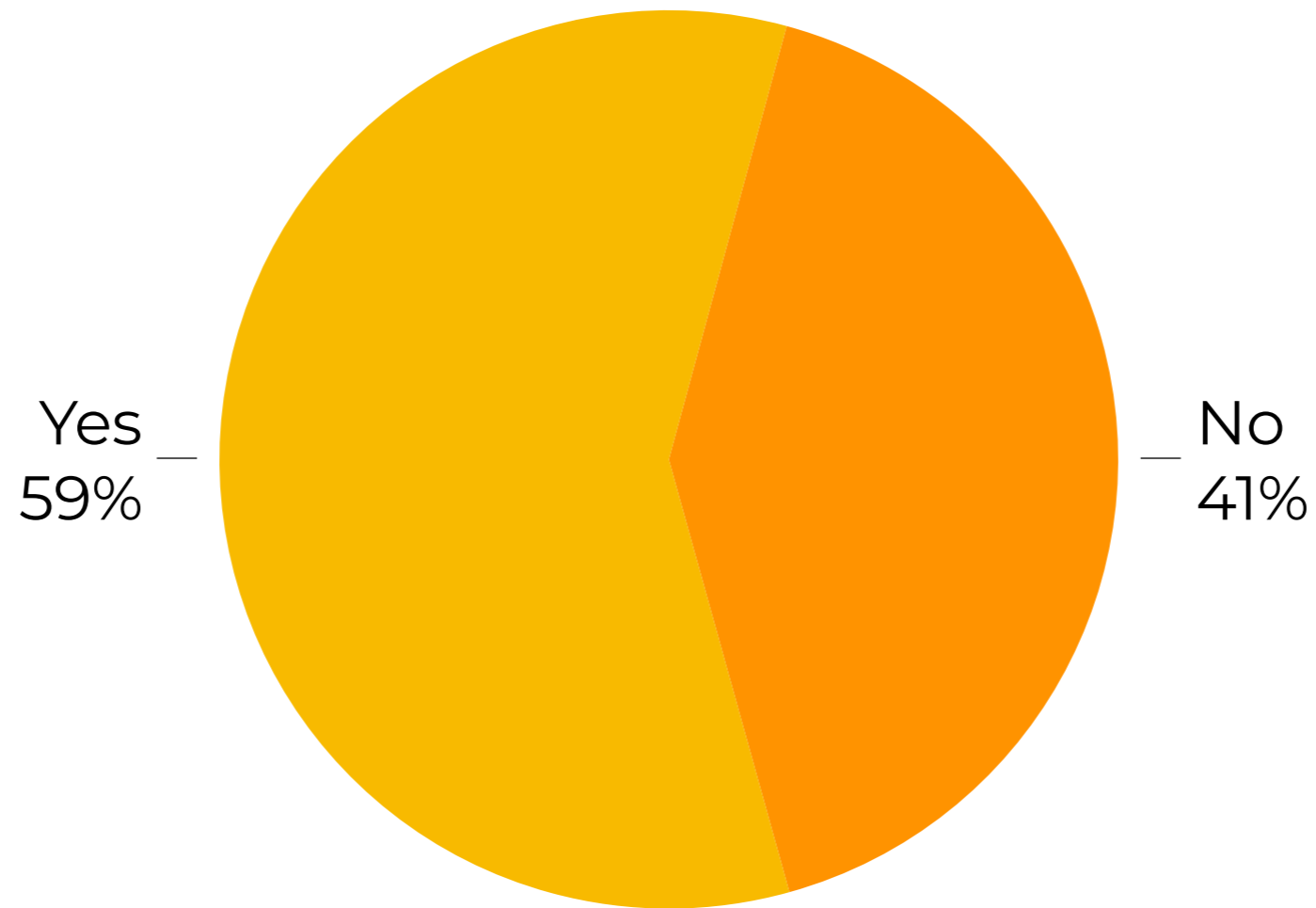


Question 7:

- 53% (263) of those surveyed either never set up reminders for their next appointment, or waited until near the time they needed a new appointment to set it up. **More timely reminders could nudge them into more consistent action.**
- 41% (201) set them up during the previous appointment. We can ask people to confirm their next appointment after we know they just had one and **get a good commit rate** to help keep the gaps closed.

Question 8:

In the past 5 years, has your doctor reminded you that you need to schedule physicals and screenings?

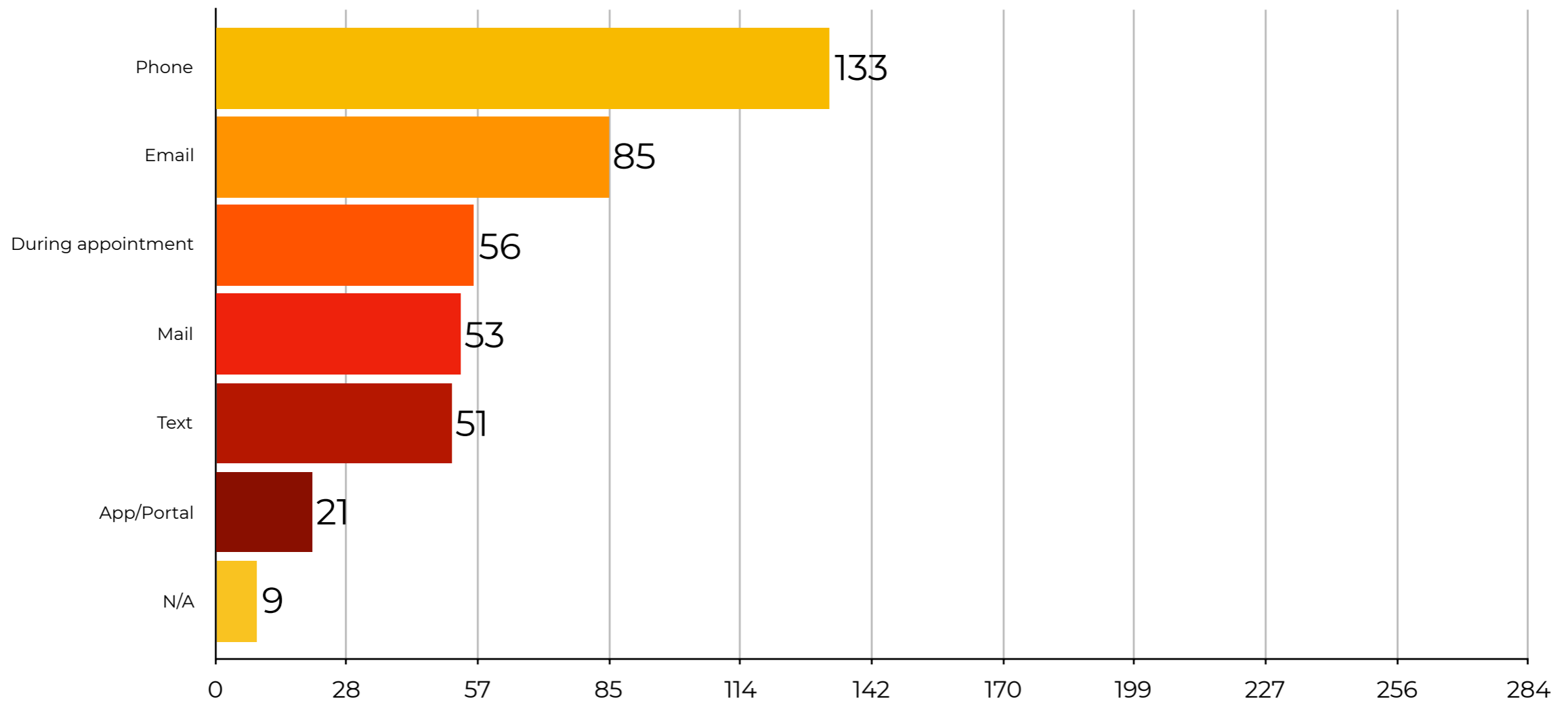


Question 8:

- 41% (206) don't get reminders from their doctors.
- Depending on overlap with people not setting up reminders themselves during the prior appointment, **there are many people we can influence with reminders.**

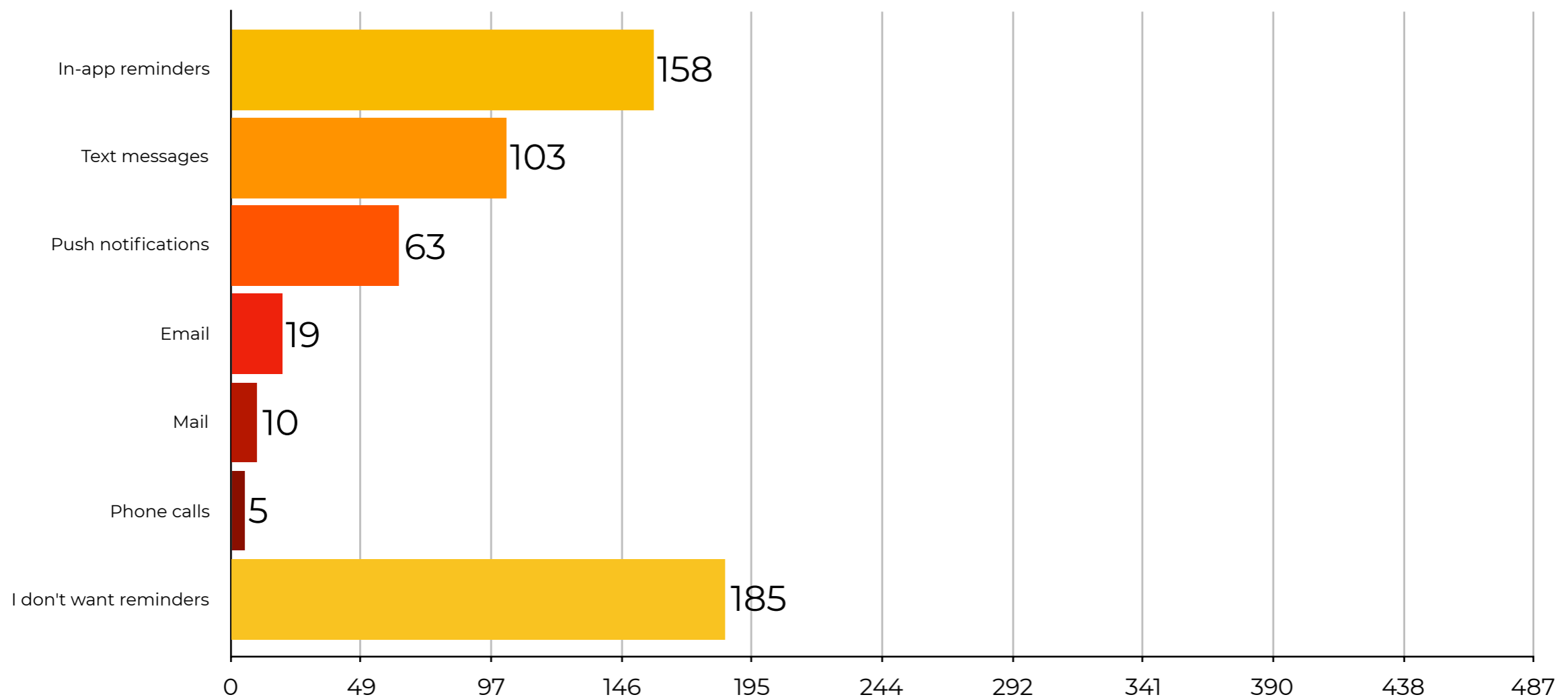
Question 9:

How did your doctor send appointment reminders?
(Select all that apply).



Question 10:

If Virgin Pulse could remind you about scheduling and attending your screenings, how would you prefer we remind you?

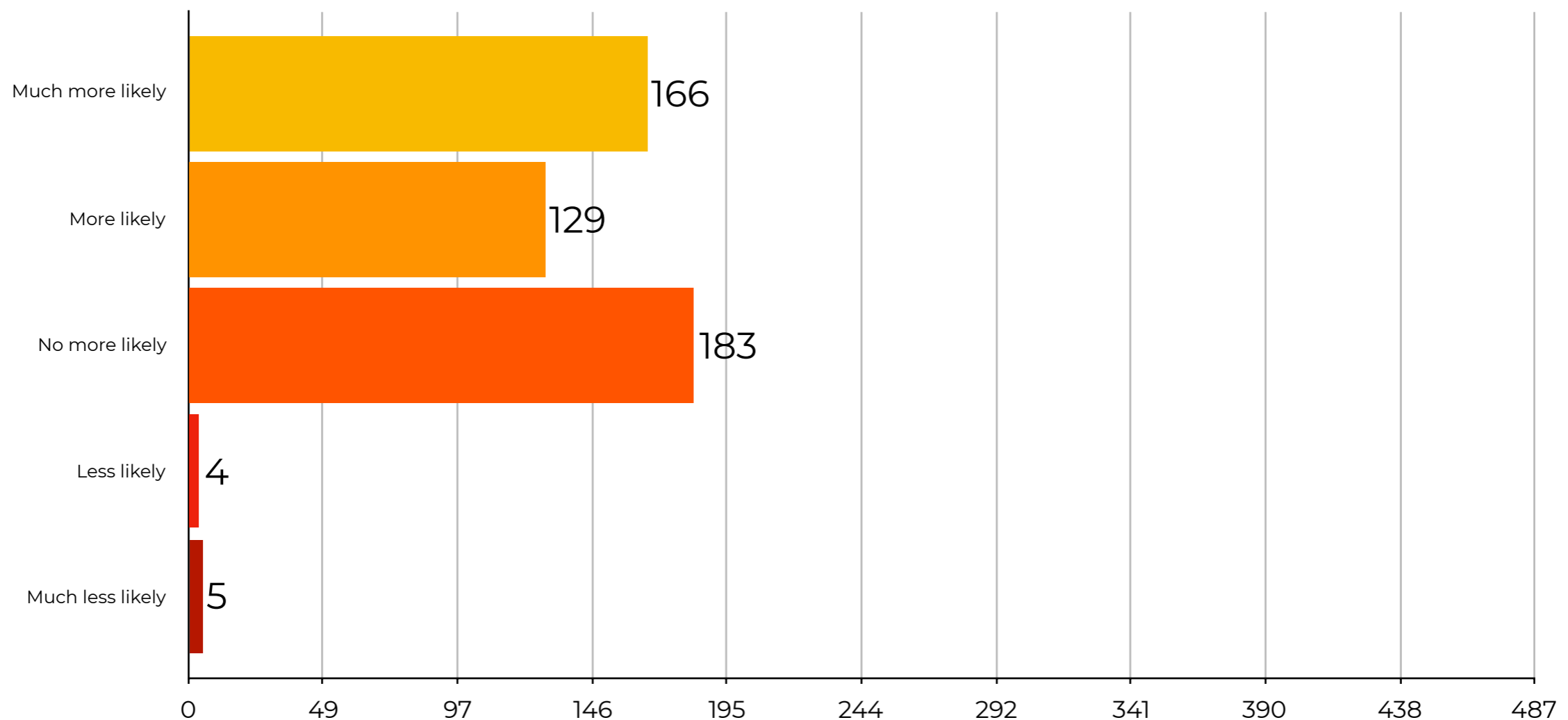


Questions 9 and 10:

- Nearly 40% of our audience doesn't want reminders *specifically from us* (Comms problem, see slide 37).
- Based on what they told us in the final question, we think this is **based on perception of what we do**.
- In-app reminders, text messages, and push notifications are the most desired reminders (totaling roughly 67%). These are great for **direct, immediate action on a mobile device**.

Question 11:

If you could earn rewards through Virgin Pulse for things like attending your annual screenings and getting flu shots, how likely do you think you would attend your annual physicals or screenings?

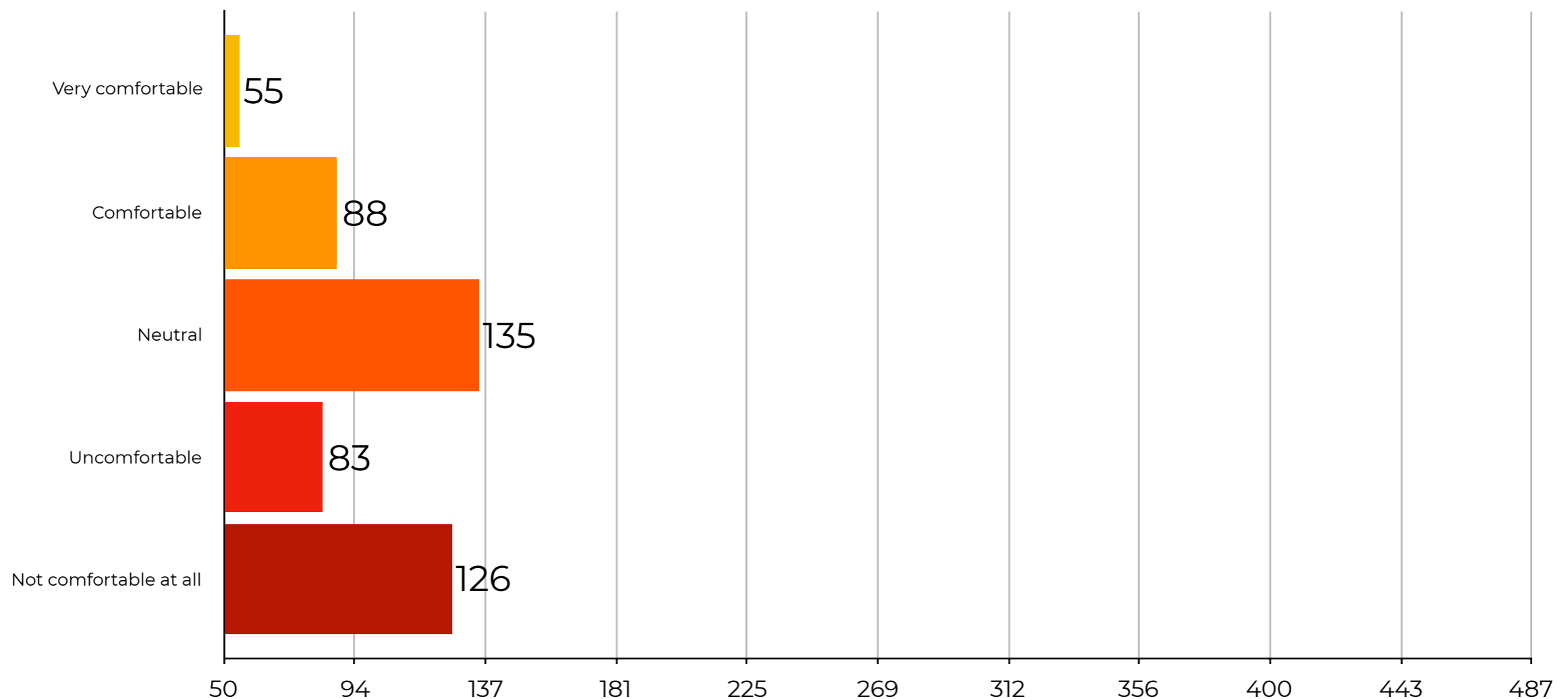


Question 11:

- Good news! Paying people to get to their appointments will mostly work!
- **~60% of people say they are more likely to go.**
- ~38% are neutral.
- Very few people (~2%) are less likely to go.

Question 12:

To what extent would you be comfortable with Virgin Pulse using data from your health insurer to provide more accurate advice and reminders for your annual screenings? (This data would NEVER be available to your employer in a way that would identify you personally)



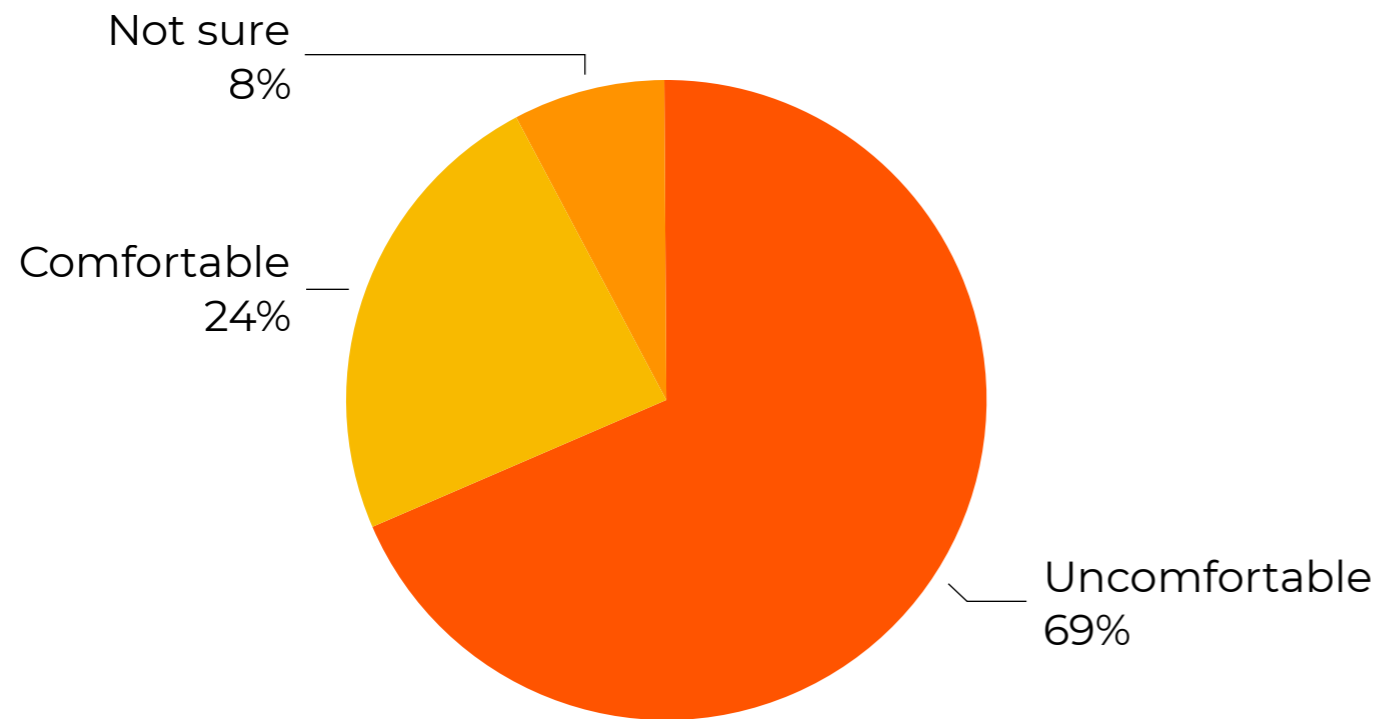
Question 12:

- 43% (209) indicated they were **uncomfortable with us using insurance data**. We specifically used the words “insurance data” to ask about this, connected to functionality they expressed a desire for (reminders).

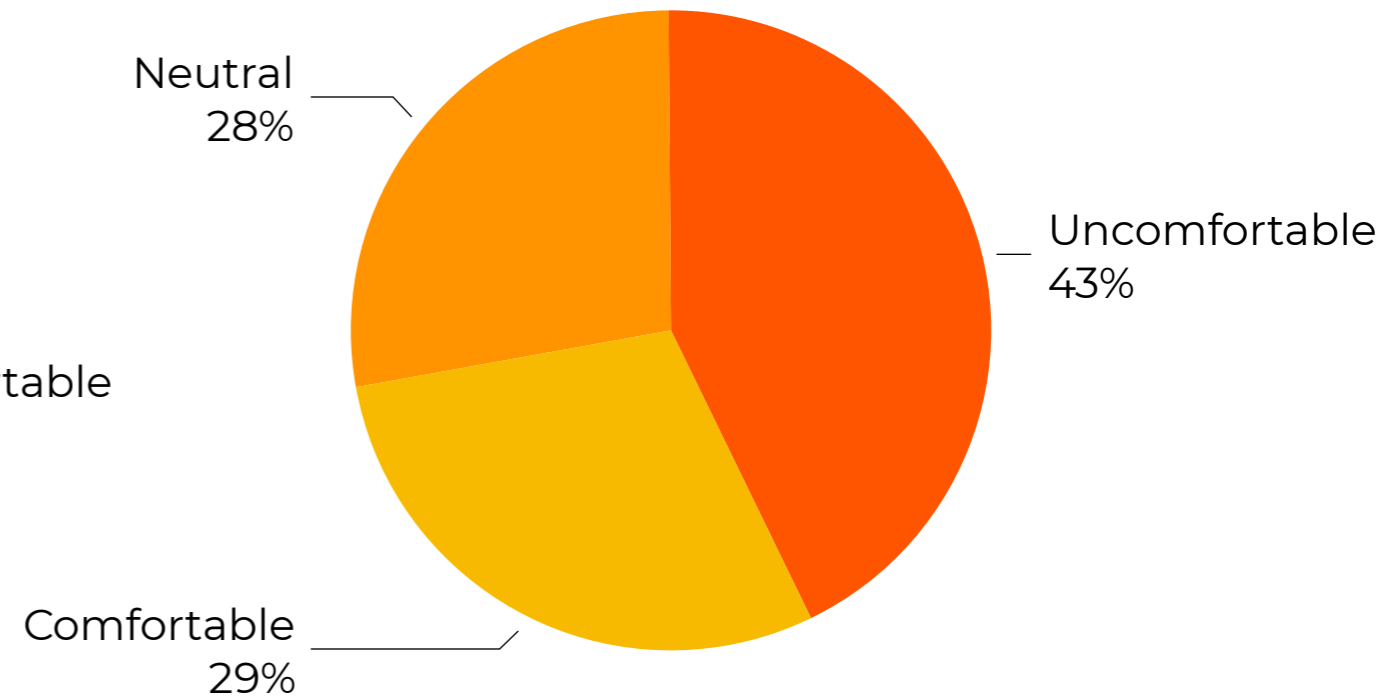
Question 13:

Why have you selected that option?

This question (#13)



Previous question (#12)



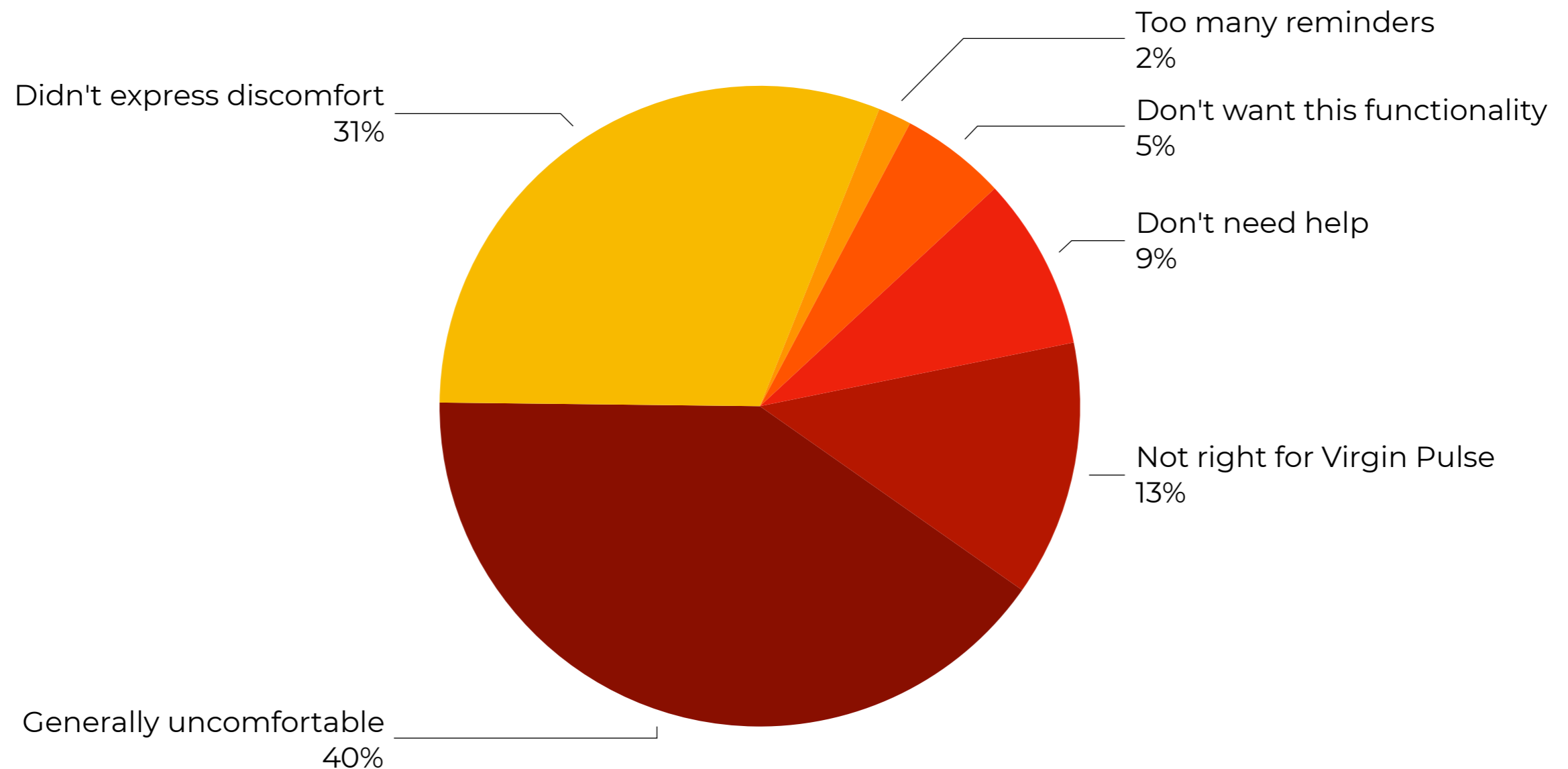
Question 13:

- When parsing out open-ended answers the numbers changed. **MORE people (69%, 376) expressed specific discomfort in their answer when asked to reflect.**
- This is likely due to neutral people being asked to reflect further and specifying some discomfort.

Question 13:

Reasons for discomfort: 69% of all responses

(31% that didn't express discomfort are shown in the chart for context)



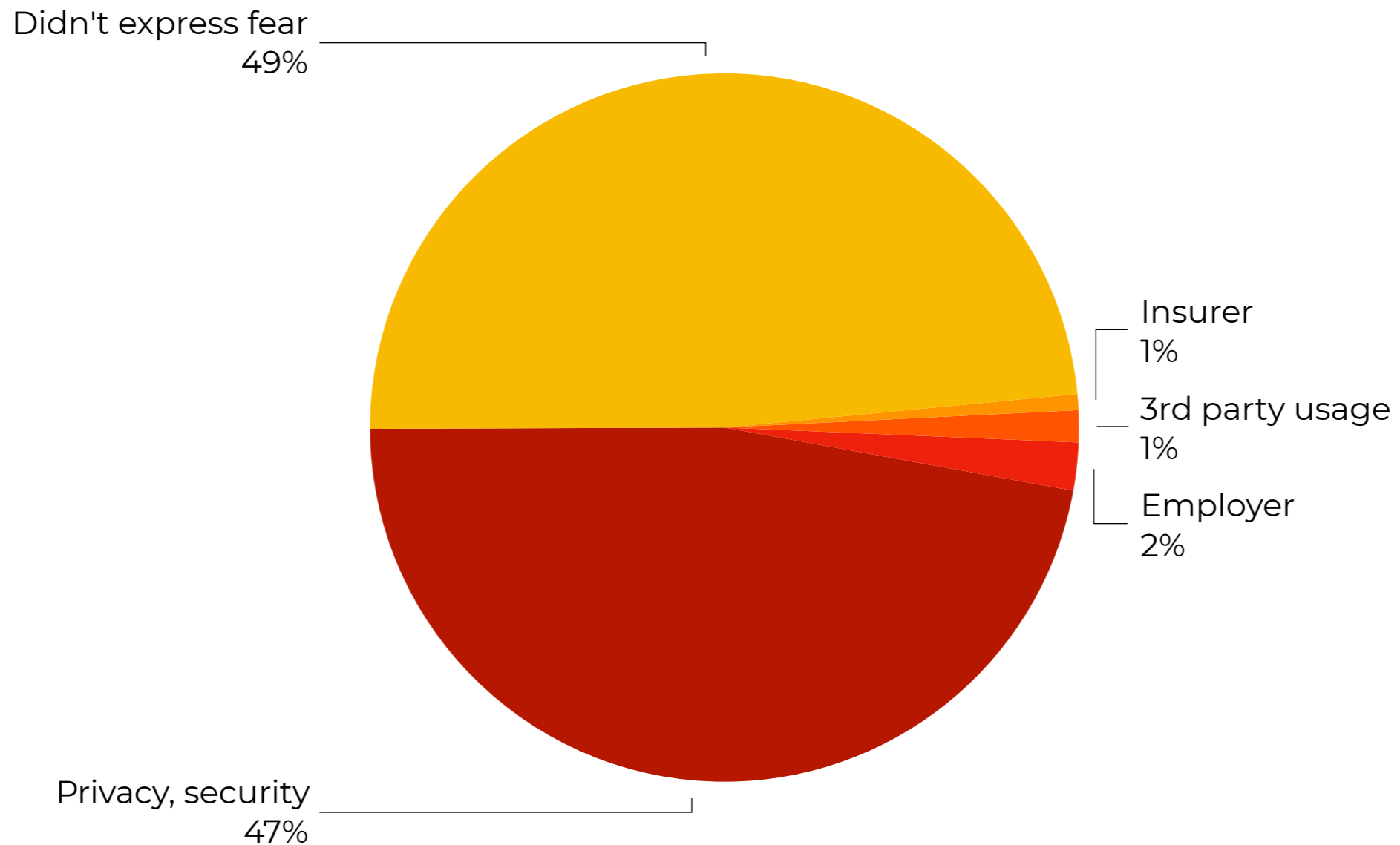
Question 13:

- Of the total audience:
 - 40% (144) were non-specifically uncomfortable.
 - 13% (46) **specifically didn't want VP to do this.**
 - 16% (56) just weren't interested for various reasons.

Question 13:

Reasons for fears: 51% of all responses

(49% that didn't express fear are shown in the chart for context)



Question 13:

- Of all responses (comfortable and uncomfortable) that mentioned some fear (51%, 212):
 - 92% (194) of them had privacy, security concerns.
 - Very few people (5%, 12) were specifically worried about their insurer or their employer.
- **In total 47% (194) of everyone had privacy/security concerns.**

Let's talk about Q13...

This was an open ended question. 84% of people chose to answer it. Only 50% of people answered the other open-ended question. **People had *feelings* they wanted to share with us.**

Reminders

There is a **large addressable audience** for receiving preventative care reminders that stated they would be likely to respond by getting care in exchange for rewards.

This fits well into our model of success: nudge people towards taking a healthy action and make it easier to accomplish.

Reminders have a good chance of being a successful nudge that closes care gaps.

Security/Privacy

Security is a major concern even for people who are comfortable with this functionality. It is top of mind.

People are far more **scared of general security/data breaches** than they are of their employer or insurer.

Most common theme: **this is between me and my doctor.**

A small but vocal minority of Members *really* don't want this. Allowing them to **opt out** is probably necessary to avoid a backlash that could negatively affect usage.

Relevance to VP

11% of people didn't think the suggested functionality matches Virgin Pulse. Generally, this accompanied a reference to us being specifically a wellness company and **not a health company.**

We need to start messaging what we're planning to do and how our focus is shifting. We need to help people understand why we're doing what we're doing.

37% don't want Virgin Pulse to send reminders regardless of how well it matches our platform. We should probably make it **possible to turn these off.**

See the results yourself:

<https://www.surveymonkey.com/analyze/>

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