

CONSUMERISM



"Through health care is experiencing a seismic shift in the type of care modern consumers expect, opportunities for those that respond to it appropriately are large. The actors of health care over the next decade will all share one thing in common: the understanding that consumerism is king." - Ken Robbins, CEO, Mile Interactive, an American Business Association's Emerging Health News & Innovation (12/22/2017)

COO-HEALTH

Right Patient, Right Provider, Right Time

DRIVERS OF CONSUMERISM



- Self-Diagnosis
- Clean Eating
- Medical Shopping
- Pricing Transparency
- User Experience
- Application

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APPLICATION



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CONSUMERISM - U.S. RETAIL CLINICS



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DATA-DRIVEN APPROACH

OUR BELIEF

A data-driven strategy reduces patient acquisition costs, increases marketing spend effectiveness, and establishes long-term profitable patient relationships.

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FIRST STEP

IDENTIFY (Research + Strategy)

Research uncovers insights and informs strategy.

Identify the Right Patients

- Predictive Market Analysis
- Custom Research
- Market Lead/Provider Growth Projections
- Demographic Patient Profiles
- Consumer Lifestyle, Media & Digital Preferences



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IDENTIFY THE RIGHT PATIENTS - PREDICTIVE ANALYSIS - SERVICE LINE GROWTH PROJECTIONS

The Advisory Board Market Planner

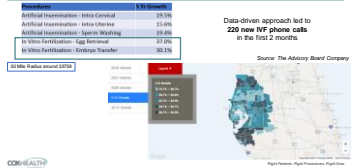
Birth Rates by 2021



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IDENTIFY THE RIGHT PATIENTS - PLAN FOR THE FUTURE



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IDENTIFY THE RIGHT PATIENTS - PREDICTIVE ANALYSIS - SERVICE LINE GROWTH PROJECTIONS

The Advisory Board Market Planner
 Projected by County, by Facility, by Revenue

Total Office Visit Growth - 0 - 18 years

| Year | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 |
|---------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Population | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 |
| Office Visits | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 | 100,000 |

Outpatient Coding Comprises:
 - Office Outpatient Services - Other Outpatient Evaluation

Drivers of Pediatric Outpatient Services

- Drive toward preventive care likely to increase treatment rates and procedures
- Advances in clinical technology drive many OP procedures to be accomplished in physician offices
- Expansion of insurance coverage may drive more parents to seek care for their children
- States with high immigration will experience greater pediatric volume growth

Source: Advisory Board Strategy Advisor Research and Analytics

PATIENT PROFILES - DEMOGRAPHICS & LIFESTYLE

Demographics

- Age** 25-54 (70% to maximize this age range)
- Employed** 70%
- HH** \$100k-\$200k
- Homeowners** 64%

Media Consumption

- Targeted Display** 57%
- Paid Search** 40%
- Social** 83%
- Video** 28%
- Radio** 44%

Source: Advisory Board Analytics



IDENTIFY THE RIGHT PATIENTS - LOCAL EXAMPLE

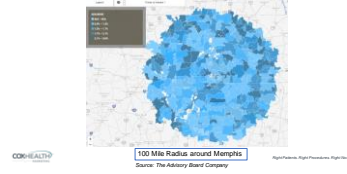
Prevalence of ailments

| Ailment | Prevalence |
|---------------------------|------------|
| ADDD/ADHD | 2.0% |
| Backache/Back Pain | 23.2% |
| Insomnia | 6.5% |
| Migraine Headache | 7.7% |
| Muscle Strain/Sprain | 4.3% |
| Restless Legs Syndrome | 3.2% |
| Sinus Congestion/Headache | 13.6% |
| Sleep Apnea | 4.2% |

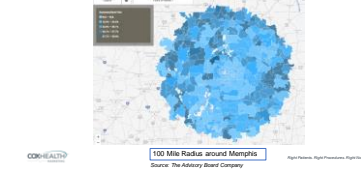
100 Mile Radius around Memphis

Source: The Advisory Board Company

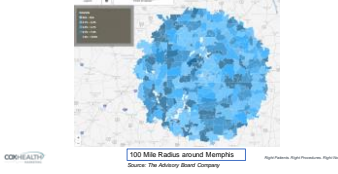
IDENTIFY THE RIGHT PATIENT | PREVALENCE OF ADD/ADHD



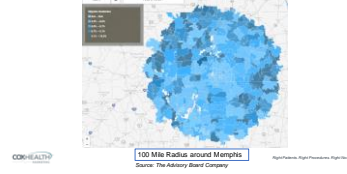
IDENTIFY THE RIGHT PATIENT | PREVALENCE OF BACKACHE/BACK PAIN



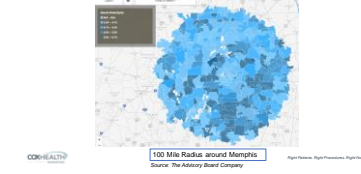
IDENTIFY THE RIGHT PATIENT | PREVALENCE OF INSOMNIA



IDENTIFY THE RIGHT PATIENT | PREVALENCE OF MIGRAINE HEADACHES



IDENTIFY THE RIGHT PATIENT | PREVALENCE OF MUSCLE STRAINSPRAIN



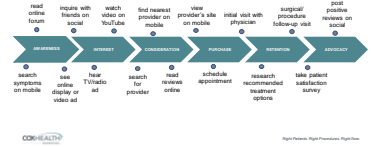
ENGAGE THE RIGHT PATIENTS THROUGHOUT THEIR ENTIRE JOURNEY



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HOW WE DO IT

ACQUIRE
 Patient is Learning
 Results-driven, Learning obsessed.

Acquire the Right Patients

- Cost Per Acquisition: Goals
- Return on Investment
- Campaign Optimization

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 Right Patients. Right Procedures. Right Now.

ACQUIRE THE RIGHT PATIENTS

Use multiple analytics tools for a holistic view of what's driving ROI.
 Proper tracking allows us to better optimize campaigns, which leads to significantly better performance.

KPI Consulting Technology Tag Management Custom Reporting ROI Analysis

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SUCCESS STORIES

73% increase in new patient phone inquiries during first year
 -Southeast Orthopedic Specialists (Eatonville, FL)

412 new phone calls and 72% increase in traffic during first year
 -Kavali Plastic Surgery and Skin Renewal (Atlanta, GA)

+50% of traffic driven to practice driven by CHM
 -Florida Otolaryngology Group (Orlando, FL)

220 new IVF phone calls & 157 social inquiries during first two months
 -Fertility Clinic in Florida

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CONTINUING EDUCATION

Join us for an exclusive webinar:
Understanding Orthopedic Consumer Attitudes & Behaviors Today

Tuesday, May 22, 2018
 2:00 pm - 3:00 pm EST

Rob Klein (CEO of Klein & Partners), a leading healthcare market research, shares how to strategically tackle the consumer needs of the changing and growing orthopedic market.

Key Takeaways:

- How orthopedic market conferences offer unique opportunities
- The orthopedic consumer research-making journey
- Which media and messaging are most effective in reaching orthopedic patients
- Insights needed to make informed business and marketing decisions

ROB KLEIN
 Founder & CEO
 Klein & Partners

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 MARKETING

Thank you

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