

Healthfirst Media Review, Insights and Recommendation

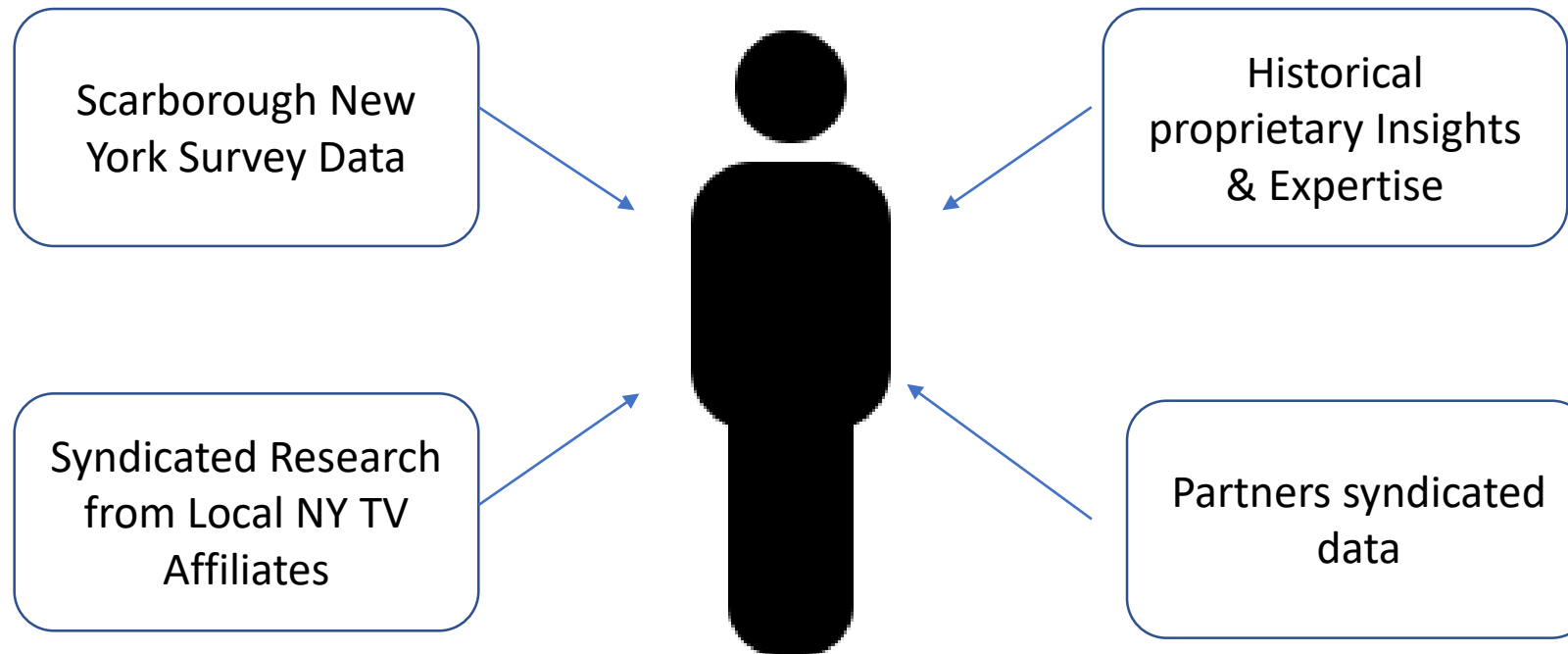
Sociedad Share-out with Butler/Till

Dec 4th, 2019

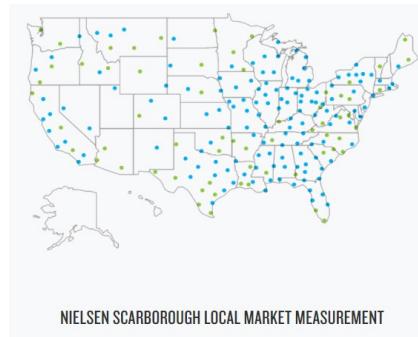
Healthfirst Target Profile

Supplemental Research

Building the Target Profile



Scarborough Methodology



- Owned by Nielsen, Scarborough has been measuring local markets for more than 40 years, across dimensions like media consumption, retail behaviors, lifestyle and demographic profiles
- Survey 200,000 individuals annual through phone interviews, survey booklets, television diaries and internet surveys, releasing two reports annually

s o c i e d A D



Proprietary WNJU and WXTV Research

- CE/SociedAd leveraged existing relationships with contacts at both local affiliates to secure critical local insights
- Sources include: Geoscope, Nielsen, Kantar, Ipsos

Language Preference

Survey Responses	HA18-24	HA25-34	HA35-44	HA45-54	HA55-64	HA65+
Spanish only	55	302	309	541	679	968
Spanish more than English	102	411	604	455	518	565
English more than Spanish	676	422	404	406	383	323
English only	680	565	402	404	315	195
English and Spanish equally	-	590	157	981	395	477

- Hispanics in New York appear to be becoming more and more bilingual as the demographic gets younger
- Hispanics 35-54 are the sweet spot where language preference appears to be evenly distributed
- **Insight:** Consider tailoring copy and language by target to match language preference; may be opportunities to test bilingual creative with younger targets

Internet Access

Survey Responses	A65+	HA65+
Access Internet [Yes]	84	68
Access Internet [No]	339	583

- **Insight:** Hispanic seniors appear to have less internet access than total market seniors
- **Implication:** Consider focusing both Hispanic and total market 65+ efforts on non-digital channels as many may not have access to the internet

Health Ads Leading to Patient Action

Survey Responses	HA18-24	HA25-34	HA35-44	HA45-54	HA55-64	HA65+
Actions taken as result of health ads past 12 months [Made an appointment to see a doctor]	149	126	145	140	137	141

- **Insight:** Consistently across all demographics, Hispanics in New York over-index for taking action and scheduling an appointment to see a doctor after having seen an ad
- **Implication:** Look to tailor messaging to promote immediate action for Hispanics in New York, as they appear to be more receptive

Readership of Daily Publications

Survey Responses	HA45-54	HA55-64	HA65+
Daily newspapers print edition - Cume [El Diario/La Prensa]	394	543	593

- **Insight:** Hispanics in New York over-index for readership of *El Diario/La Prensa*
- **Implication:** Look to concentrate print initiatives for older demographics in *El Diario* and/or *La Prensa*

Mode of Transportation

Survey Responses	HA18-24	HA25-34	HA35-44	HA45-54	HA55-64	HA65+
Bus	134	144	163	131	161	181
MTA New York City Transit Bus	111	142	184	149	169	213

- **Insight:** Hispanics in New York significantly over-index for use of buses (generally and specifically MTA buses) across all age groups, especially for Hispanics 65+
- **Implication:** Continue transit presence, as the target will likely be exposed to messaging with frequent bus travel

Sites/Apps Used

Survey Responses	HA18-24	HA25-34	HA35-44	HA45-54	HA55-64	HA65+
ElDiarioNY.com	460	564	557	312	202	210
NYPost.com	212	72	68	49	34	14
Telemundo47.com	617	376	428	482	282	150
Univision.com/UnivisionNuevaYork.com	450	465	523	448	226	153
Facebook	135	125	127	105	75	44
Google	123	120	105	94	75	35
Instagram	205	158	129	73	36	16
Twitter	197	125	75	65	55	12

- **Insight:** Younger Hispanics in New York over-index for visitation to local NY affiliate sites and social media sites, whereas most sites under-index for older Hispanics
- **Implication:** Consider layering on digital presence to reach younger Hispanics by structuring cross-channel deals with local NY Telemundo, Univision, El Diario and NY Post affiliates (who are not being reached necessarily by TV and print buys)

Household Income

Survey Responses	HA18-24	HA25-34	HA35-44	HA45-54	HA55-64	HA65+
Household income Quintile 1	29	26	105	71	47	14
Household income Quintile 2	71	76	72	79	65	41
Household income Quintile 3	92	103	85	102	94	76
Household income Quintile 4	141	174	93	84	93	115
Household income Quintile 5	167	121	145	165	201	255

- Hispanic adults in New York under-index for the first three quintiles of household income, indicating that their income may likely skew lower; the strongest indices are for the lowest quintile of household income

Household Size

Survey Responses	HA18-24	HA25-34	HA35-44	HA45-54	HA55-64	HA65+
Household size [One]	11	41	45	48	123	205
Household size [Two]	34	63	61	68	105	117
Household size [Three]	117	87	96	103	90	89
Household size [Four]	151	190	129	146	113	58
Household size [Five]	192	169	137	135	75	63
Household size [Six]	348	91	308	105	69	13
Household size [Seven]	14	24	367	307	12	51
Household size [Eight]	701	21	48	326	56	-
Household size [Nine or more]	35	343	110	126	76	-

Household Size

- **Insight:** Hispanics in New York aged 18 to 54 over-index for household size of four and five, larger than the average American household
- **Implication:** Focus messaging around multi-generational experiences and households, highlighting efficiencies and cost-effective options with Healthfirst

Health & Behaviors

Survey Responses	HA18-24	HA25-34	HA35-44	HA45-54	HA55-64	HA65+
Online Purchase - Medicine/prescriptions	111	126	144	114	31	40
Online Shopping - Internet Insurance	101	161	136	88	31	22
Online Shopping - Medicine/prescriptions	121	127	172	116	40	40
Medications - Allergies	98	129	135	121	92	53
Medications - Arthritis	7	31	87	103	142	298
Medications - Diabetes	54	62	54	118	215	284
Medications - High blood pressure	1	17	32	87	128	191
Medications - Weight loss	65	159	171	167	127	57

- **Insight:** Younger Hispanics over-index for online shopping and purchase for medications and insurance, while older Hispanics significantly under-index
- **Insight:** Older Hispanics were more likely to purchase medications for diabetes, arthritis and high blood pressure, while younger Hispanics were more likely to purchase medications for allergies
- **Implication:** Consider focusing on condition-specific messaging to target specific audiences and behaviors

Health & Family

Survey Responses	HA18-24	HA25-34	HA35-44	HA45-54	HA55-64	HA65+
Caregiver of aging parent or relative	85	88	101	163	176	66
Self-employed	56	81	113	191	109	6

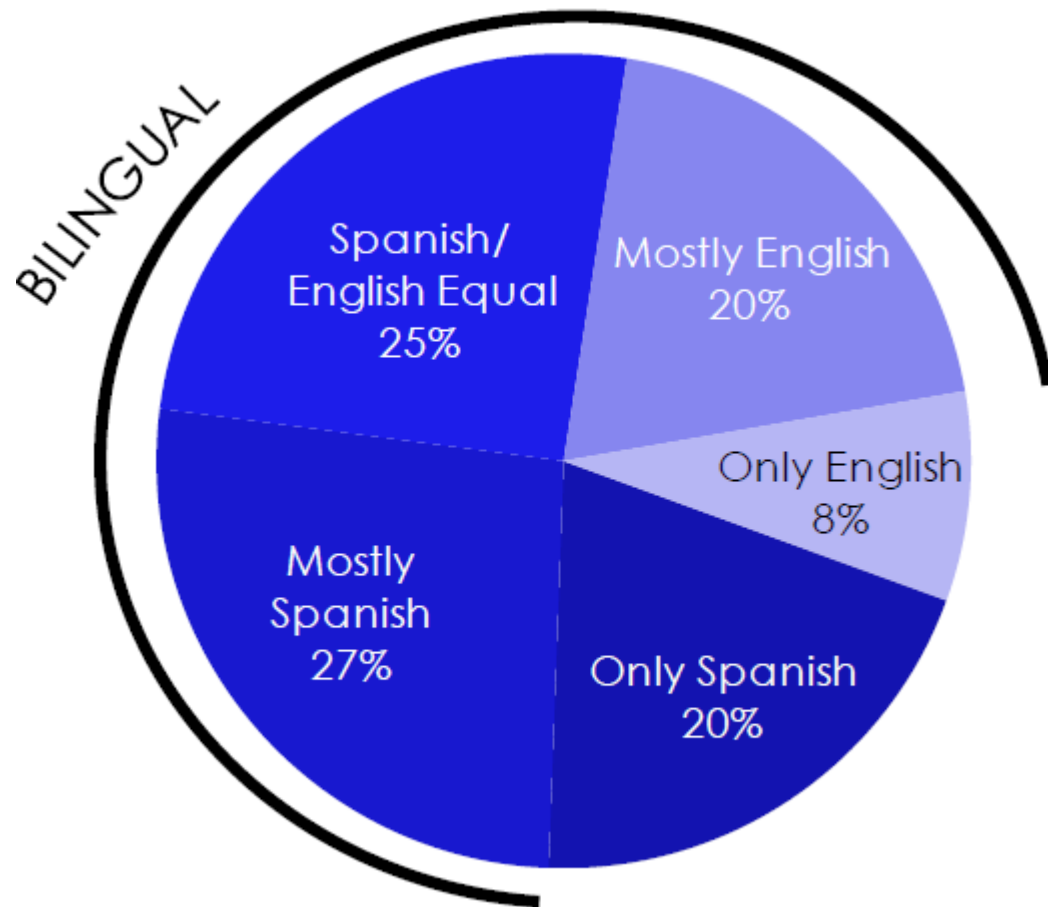
- **Insight:** Hispanics 45 to 64 in New York over-index for being a caregiver of an aging parent or relative, though those over 65, significantly under-index
- **Insight:** Hispanics aged 45 to 54 over-index significantly for self employment, a valuable segment for Healthfirst insurance plans
- **Implication:** Consider specific messaging for caretakers and small business owners

Marketplace Insights: Demographics



- Hispanics represent 26% of the population in New York, with over 5.6MM in the DMA
- Represent 100% of the population growth since 2000, outpacing non-Hispanics in the five boroughs, Long Island, New Jersey and Upstate
- More than two-thirds of New York Hispanics 18-65+ identify as White, with about 15% identifying as Black, demonstrating the diversity within this population
- The majority of Hispanics in New York (58%) are from the Caribbean, with the largest share identifying as Puerto Rican (29%) and Dominican (28%), followed by Mexican (11%), Ecuadorian (6%), Salvadoran (6%) and Colombian (5%)

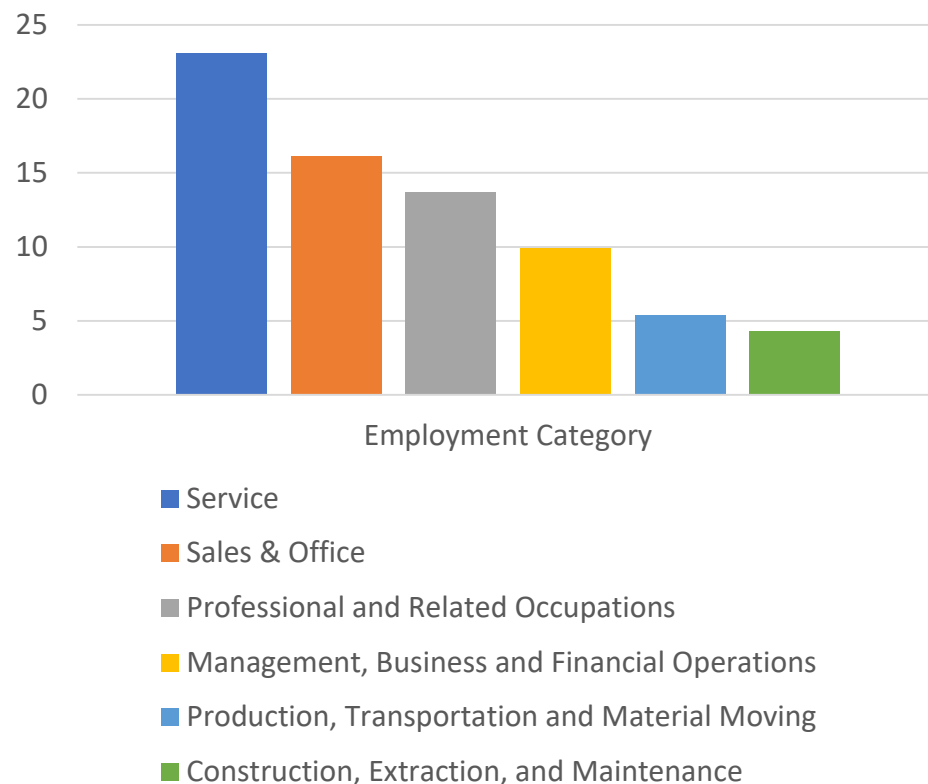
Marketplace Insights: Language



- Approximately 92% of New York Hispanics speak Spanish, with 72% identifying as bilingual
- Of those, 47% are Spanish dominant
- This has significant business implications in today's economy—
 - 87% appreciate businesses that communicate with them in Spanish
 - 56% agreed that language is one of the most important aspects of culture to preserve
 - 62% agreed that Spanish language is more important to them today than it was five years ago

Marketplace Insights: Employment

Employment Among NY Hispanics 18-64



- The largest share (almost a quarter) of New York Hispanics 18-64 are employed within the Service industry, but also see representation within sales, professional and management industries
- More labor-intensive industries like production and construction saw much lower share of the Hispanic workforce
- Approximately 28% of New York Hispanics 18-64 are not currently employed

Marketplace Insights: Household Income

HA18-64

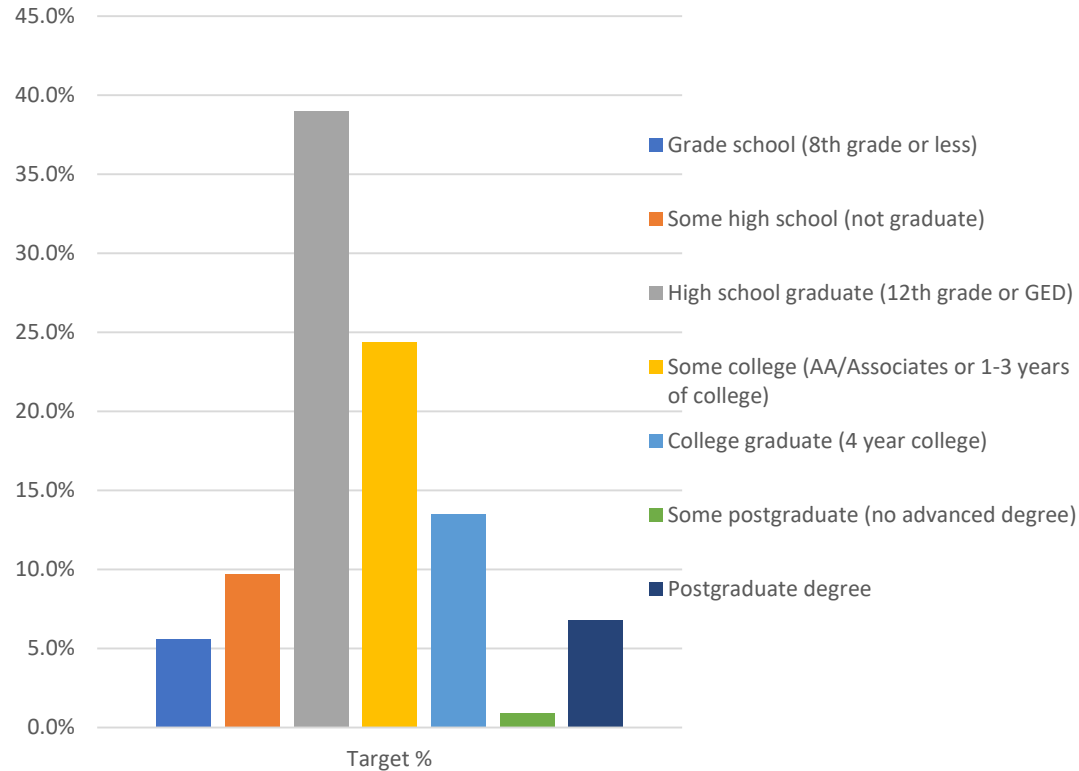
Household Income for NY Hispanics 18-64



- About a third of New York Hispanics 18-64 earn between \$50,000 and \$150,000 per year, with the larger portion of those coming from the \$50,000 to \$75,000 range

Marketplace Insights: Education

Education for NY Hispanics 18-64



- The majority of New York Hispanics 18-64 have graduated high school and attended some college

Marketplace Insights: Media Habits



- 42% of New York Hispanics 18-64 read any daily print newspaper



- 75% of New York Hispanics 18-64 have listened to more than 5 hours of radio in the last 5 days



- 96% of New York Hispanics 18-64 have internet access



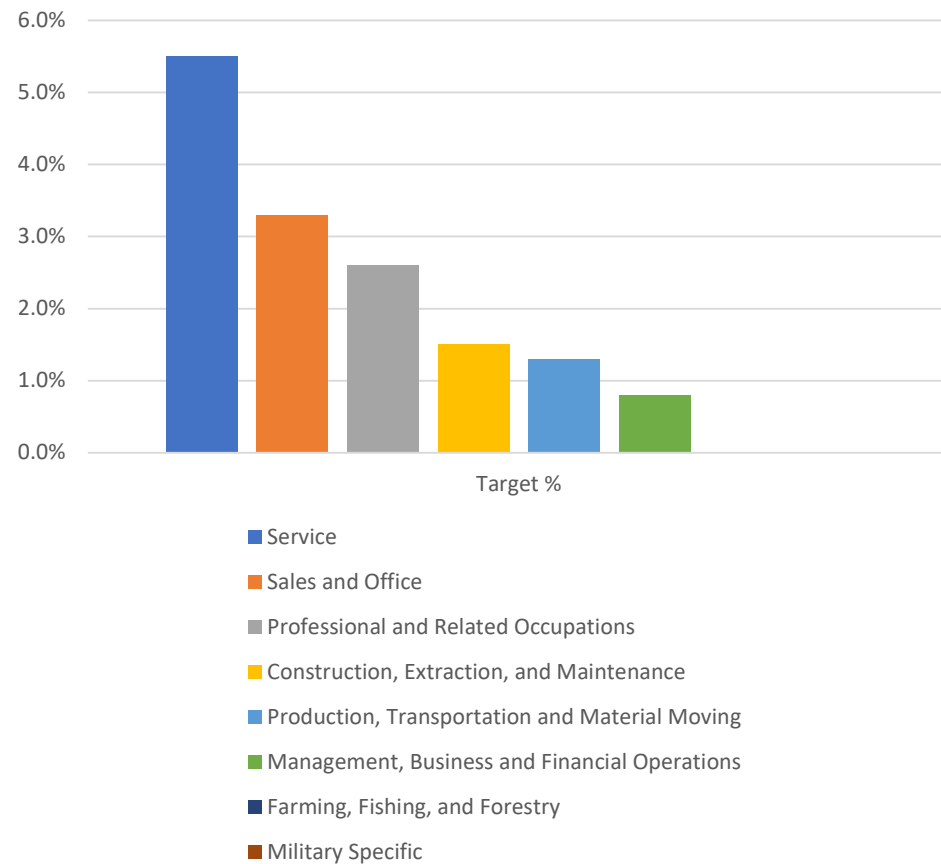
- 56% of New York Hispanics 18-64 have watched more than 10 hours of TV in the last 7 days



- 75% of New York Hispanics 18-64 have a cable subscription

Marketplace Insights: Employment

Employment Among NY Hispanics 65+



- A total of 85% of New York Hispanics 65+ are not employed with about 62% retired and 11% identifying as disabled
- Of the 15% that are employed, the largest share are employed within the service and sale industries

Marketplace Insights: Household Income

HA65+

Household Income for NY Hispanics 65+

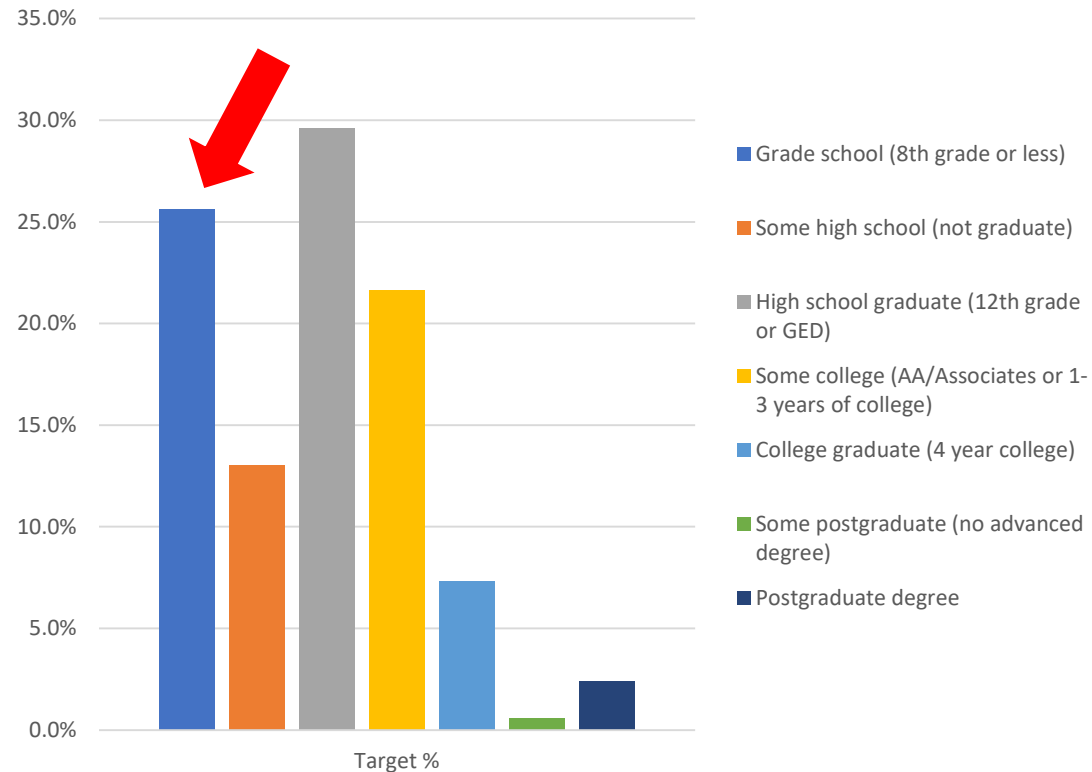


- Compared to younger New York Hispanics, the 65+ population is overwhelming more likely to be lower income, despite a portion Hispanic seniors reporting HHI between \$50,000 and \$75,000

Marketplace Insights: Education

HA65+

Education for NY Hispanics 65+



- Compared to younger New York Hispanics, a significant portion (25%) of seniors are less likely to have completed high school

Marketplace Insights: Media Habits



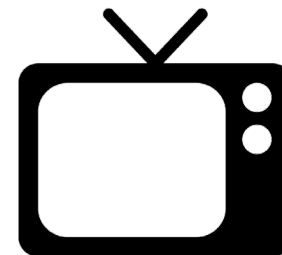
- 45% of New York Hispanics 65+ read any daily print newspaper



- 58% of New York Hispanics 65+ have listened to more than 5 hours of radio in the last 5 days



- 64% of New York Hispanics 65+ have internet access



- 79% of New York Hispanics 65+ have watched more than 10 hours of TV in the last 7 days



- 81% of New York Hispanics 65+ have a cable subscription

Proven Performers for Hispanic Initiatives



CE/SociedAd have partnered with Adsmovil historically for programmatic mobile tactics and seen above benchmark click metrics and video completion and strong time spent on site



CE/SociedAd have unlocked retargeting tactics by reaching exposed and competitive audiences using display and video ad formats and automated content recognition



CE/SociedAd have leveraged Pandora's first party data to reach users listeners of Spanish language music around key tentpoles – with expansions into connected home and in-car devices, offering is expanding



CE/SociedAd saw success by employing a one-two punch between syndicating third party content through inPowered's technology and repackaging and pushing out owned content with Nativo's unique offering

Proven Performers for Hispanic Initiatives



CE/SociedAd have driven significant, but efficient reach, employing local network radio buys in key Hispanic markets and expanding into digital audio streaming with Univision's new platform, Uforia.



CE/SociedAd has tapped the two leading Spanish Language TV networks for a variety of initiatives, but in working with both networks as complementary and competitive buys, has been able to efficiently execute support in the form of :15s, :30s and custom segments/integrations.

Healthfirst Media Review and Recommendation

Annual Enrollment Period 2021

AEP 2021 – Plan Overview

Key Planning Parameters

Target Insights:

- Adults 65+, HHI <\$20K, New York DMA
- Medicare-Medicaid eligible

- **Timing:** October 1 – December 7, 2020

Measurement:

- Total enrollment/response, increase conversion rate, improve cost per response (CPR), audience reach, influence qualified, in-market audiences

- Estimated Enrollment: 1,731

Total Budget: \$1.6MM

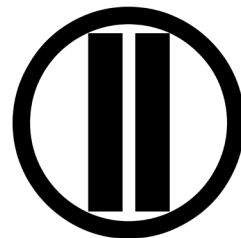
Media Tactics & Channels

Media Channels:

- Direct Response TV (WCBS, WNBC, WNYW, WPIX, WLNY, WNJU, WXTV)
- Out of Home (Subway Brand Train)
- Free Standing Insert (Daily News, NY Post, El Especialito)
- Run of Paper (Daily News, AM New York, Metro New York, NY Post, El Especialito, Harlem Community News, Caribbean Life, World Journal, Sing Tao)
- Direct Mail (infoUSA, focusUSA)
- Native (MediaAlpha, Taboola)
- Social (Facebook)
- Search (Search Engines)



AEP 2021 – CE/SociedAd Insights



- **Direct Response TV**

- Maintain heavier weight at the beginning and end of AEP to capture Kick Off and Last Chance, but also build in lighter :15 and :30 support earlier in the campaign through local TV (avoiding DR messaging, strictly to build awareness and brand recognition)

AEP 2021 – CE/SociedAd Insights



- **Out of Home**

- Include unique URL in placements to better track attribution, provide opportunity to re-message visitors to the site; determine language preference

AEP 2021 – CE/SociedAd Insights

DAILY NEWS

NEW YORK POST

El Especialito

am NEW YORK

metronews

Caribbean Life

- **Free Standing Insert (Print) and Run of Print**

- Older Hispanics in New York are more likely to be Spanish dominant (968 index versus 195 for English Only), so maintaining a presence in Spanish language publications is critical
- Daily readership of the print edition amongst HA65+ of [*El Diario/La Prensa*](#) over-indexes at 593—consider adding this publication as well

AEP 2021 – CE/SociedAd Insights

focus  USA



- **Direct Mail**

- Could be informed by those attending seminars and providing address information, could extend to prospecting in zip codes where there appears to be more significant interest

AEP 2021 – CE/SociedAd Insights



- **Paid Search**

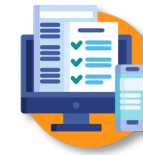
- Given the multicultural nature of many Hispanic households in NY, consider messaging/copy for caretakers and family members researching on behalf of someone else.
- Scarborough data for HA45-64 suggests that many are caretakers for family members (Caregiver of aging parent or relative, 163-176)

AEP 2021 – CE/SociedAd Insights



- **Paid Social**

- Consider testing [dynamic language optimization](#), as some bilingual Hispanic New Yorkers may be searching in a language other than their browser setting; consider broadening target or creating secondary target for researchers on behalf of a family member; consider layering on competitive targeting of other products and companies for A65+



AEP 2021 – CE/SociedAd Insights

Taboola

 **MediaAlpha**

- **Native**

- Consider CPE model, whereby a user can be driven to a quick-reference and self select as qualified and convertible by taking a secondary action like “Enroll Now” (with a partner like [inPowered](#))

AEP 2021 – Opportunistic

- **Digital**

- Geo-targeting users who visit hospitals, clinics, assisted living facilities (ex. [Adsmovil](#)) and remessaging with brand awareness message
- Target specific conditions and concerns most impact to Hispanics in NY, including diabetes, high blood pressure, etc based on 3P purchase data

- **Print**

- Aligning Healthfirst with digital newspaper content with properties near-and-dear to the target's heart and home culture (ex. [Digo Hispanic Media](#))

Healthfirst Media Review and Recommendation

New York State of Health Open Enrollment Period 2021

OEP 2021 – Plan Overview

Key Planning Parameters

Target Insights:

- Adults 18-64, New York DMA
- Medicaid, Essential eligible

Timing: November 1 – December 15, 2020

Measurement:

- Generate qualified leads and convert leads into measurable growth for Medicare and Long-Term

Total Budget: \$980K

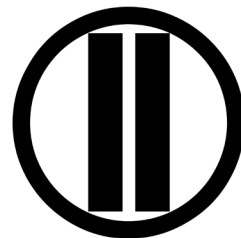
Media Tactics & Channels

Media Channels:

- Direct Response TV (WCBS, WNBC, WNYW, WPIX, WLNY, WNJU, WXTV)
- Free Standing Inserts (Daily News, El Espacialito)
- Native (MediaAlpha, Taboola)
- Social (Facebook)
- Search (Google Search)



OEP 2021 – CE/SociedAd Insights



- **Direct Response TV**

- Reconsider dayparting approach to narrow in on times when A18-64 or their caretakers are watching TV, using HUT/PUT.
- Consider whether buy should be structured around 8am to 8pm call center hours, or whether the dayparts can be optimized to consumption

OEP 2021 – CE/SociedAd Insights

DAILY  **NEWS**

El Especialito

- **Free Standing Insert (Print)**

- Hispanics 18-64 skew slightly more English preference, but also speak Spanish (indices ranging from 323 to 676), so presence within both English and Spanish language publications is critical
- Consider call-only copy for more niche publications for less tech-savvy audiences.

OEP 2021 – CE/SociedAd Insights



- **Paid Search**

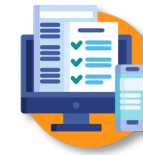
- Limit keywords to narrow parameters for specific messaging around the most common conditions.
- Broaden keyword targeting for reach to drive brand recognition and awareness.

OEP 2021 – CE/SociedAd Insights



- **Paid Social**

- Consider testing condition-specific interests and member lookalike strategy, as broader affinity targeting tactics either Healthfirst or insurance may not yield as much scale for younger users
- Potential to test “Get a quote” or additional calls to action beyond “Learn more”



AEP 2021 – CE/SociedAd Insights

Taboola

MediaAlpha

- **Native**

- Consider CPE model, whereby a user can be driven to a quick-reference and self select as qualified and convertible by taking a secondary action like “Enroll Now” (with a partner like [inPowered](#))

OEP 2021 – Additional Considerations

- **Transit/Bus**

- Depending on the format, consider incorporating a QR code or unique URL to provide an angle on attribution. Consider reaching out to MTA or other transit board for first-party data on ridership.

- **Prescription (Rx) Bags**

- In addition to Rx bags, consider partnering with a pharmacy partner with blood pressure and diabetes (and other) on-site clinic offerings. May be a way to provide multiple messaging points to drive the target down the funnel.

- **Network Radio & Audio**

- Network radio can drive efficiencies and scale, as well as allowing for top station coverage on a language agnostic basis, catering to user preference. Consider layering on digital extension for network radio partner, similar to [Uforia](#) to pace with shifting user behavior. Click-based performance can lag for some digital streaming based on usage trends—consider listen-through attribution options.

Healthfirst Media Review and Recommendation

Brand 2019

Brand 2019 – Plan Overview

Key Planning Parameters

Target Insights:

- Adults 18+, New York DMA

Timing: September 2 – November 4, 2019

Measurement:

- Determine campaign success by reviewing brand health metrics delivered by Kantar Millward Brown and Comscore

Total Budget: \$1.4MM

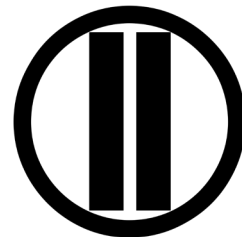
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Media Channels:

- Direct Response TV (WABC, WCBS, WNBC, WNYW, WPIX, WNJU, WPIX, NY Interconnect)
- Out of Home (Subway, Transit Shelters, Bus Kings, Mall)
- Run of Paper (Daily News, AM New York, Metro New York, Newsday, World Journal, Sing Tao, El Diario)
- Display (MediaMath, AM New York, Metro New York)
- Digital Video (MediaMath, YouTube)
- Influencer (Influencer Central)
- Social (Facebook, Instagram, Twitter, Snapchat)



Brand 2019 – CE/SociedAd Insights



- **Network TV**

- Dayparts may be relevant to content consumption but confirm if there are other dayparts where it is more common for research and conversion behavior.



Brand 2019 – CE/SociedAd Insights



• Zoned Cable TV

- Consider layering on a more efficient Spanish language and higher indexing cable network such as CNN en Espanol, Galavision, UniMas, NBC Universo, MTV Tres, Fusion, El Rey, Discovery en Espanol, Cinelatino, HITN etc



Brand 2019 – CE/SociedAd Insights



- **Addressable TV**

- Consider comparing the Altice footprint to priority zip codes, and determine if they offer the greatest reach.

Brand 2019 – CE/SociedAd Insights



- **Digital Video**

- Consider longer form skippable video with a YouTube TrueView buy (ex. [Giant Media](#)) and then retargeting based on video completion to drive efficiencies and push users down the funnel.

Brand 2019 – CE/SociedAd Insights



- **Out of Home**

- Consider buying into dynamically placed ads within healthcare environments like waiting room TVs etc could be effective in capturing the target while they are in the right mindset to be messaged.

Brand 2019 – CE/SociedAd Insights

DAILY NEWS

NEW YORK POST

El Especialito

am NEW YORK

metronews

EL DIARIO

- **Niche Print**

- Consider call-only copy for more niche publications for less tech-savvy audiences.

Brand 2019 – CE/SociedAd Insights



- **Programmatic Display**

- Consider working with partners to determine if it is feasible to optimize towards brand awareness specifically or at least optimized reach to avoid wasted impressions.

metr**o**news

am**NEWYORK**

Brand 2019 – CE/SociedAd Insights



- **Paid Social**

- Consider shifting to Facebook's specific optimization tactic for brand awareness measured in estimated ad recall lift, which is proprietary
- Consider prioritizing Facebook and Instagram, as they tend to be the heaviest lifters for the Hispanic audience across age demographics
- Aligning Healthfirst with a recognizable, aspirational NY brand like Citi Bike to engage qualified audiences
- Consider re-enacting this strategy for brand awareness around another local tentpole

Language Preference



- **Influencer Program**

- SociedAd has seen success by aligning with talent which boasts expertise in their respective area
- Consider pairing both local familiarity with expertise in health and wellness in influencer selection process