

Open Enrollment – 2017/18

Research and Creative

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EXTENSIVE RESEARCH CONDUCTED

5 Segments: Multi Segment, African American, Hispanic, Asian, LGBTQ

4,017

People surveyed across multiple studies

6+

Independent Research partners



46 FOCUS GROUPS

Social Listening Conducted

5 Languages: English, Spanish, Vietnamese, Korean, Chinese

85

Brains scanned in a neuroscience study



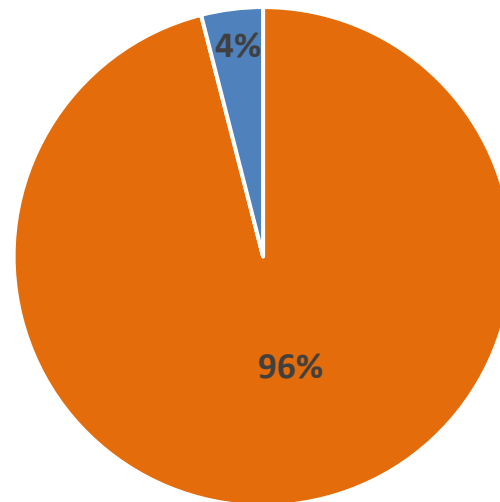
2016 Message, Motivators and Barriers Testing

VIRTUALLY EVERY CALIFORNIAN KNOWS ABOUT COVERED CALIFORNIA

1

Awareness of Covered California and the ACA continues to rise.

Awareness of Covered California
and ACA - 96% Each - 2017



■ Heard of ■ Haven't heard of

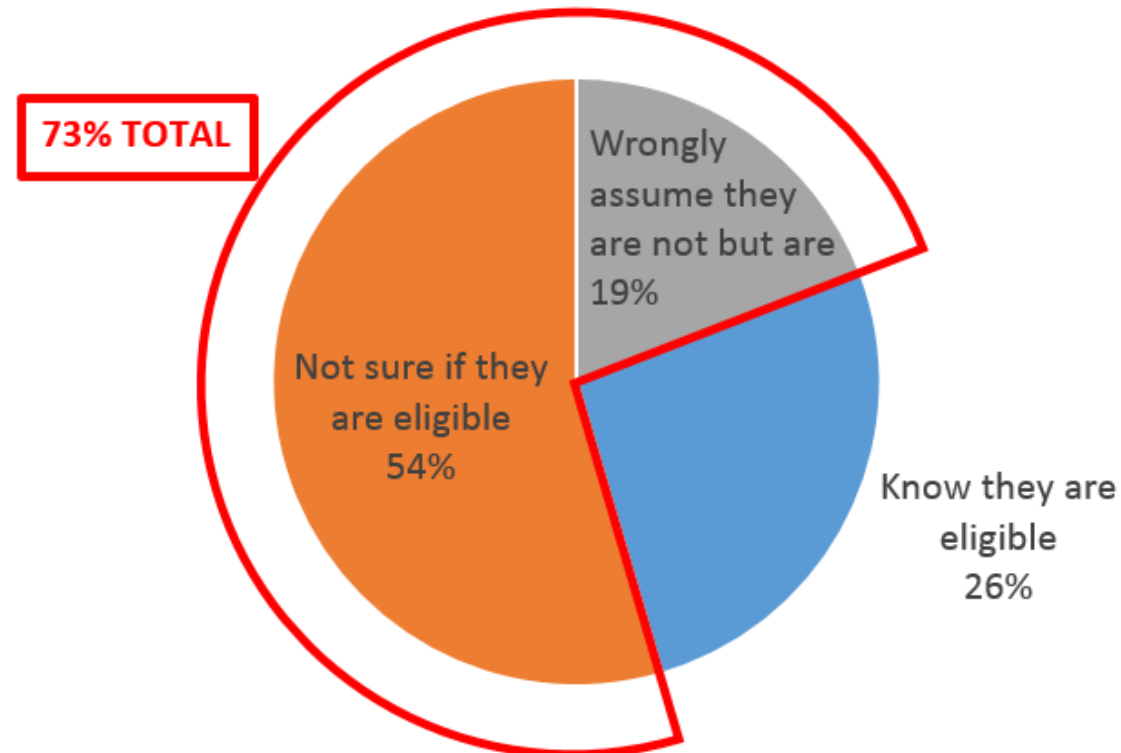


CONTINUED EDUCATION IS STILL NEEDED – NEARLY $\frac{3}{4}$ SUBSIDY ELIGIBLE DON'T KNOW IT

2

73% of uninsured subsidy eligible Californians don't know that they are eligible for subsidies or wrongly think they are not eligible.

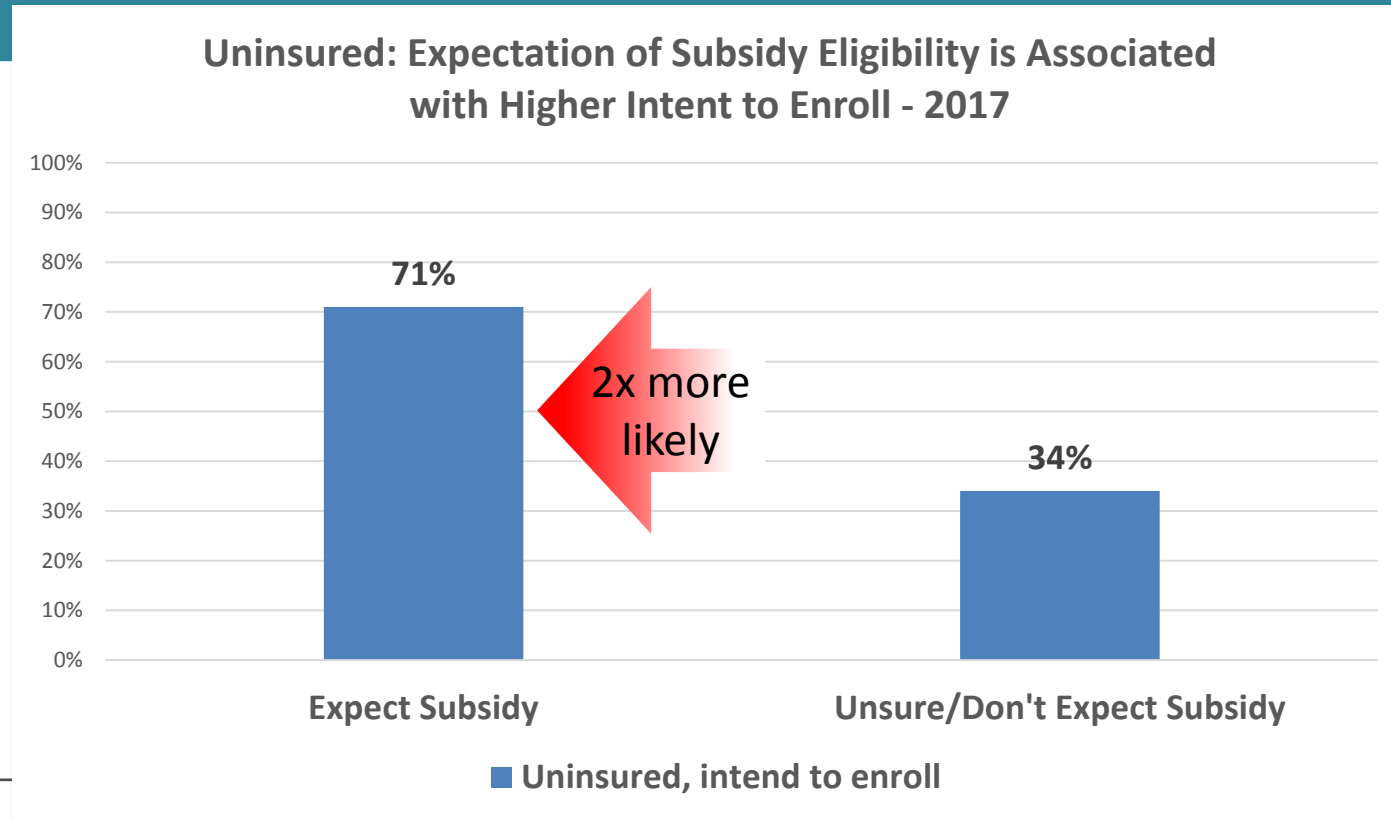
Understanding of Eligibility for Subsidies Among Subsidy Eligible Californians



THOSE WHO ARE ELIGIBLE FOR A SUBSIDY ARE MORE LIKELY TO ENROLL

3

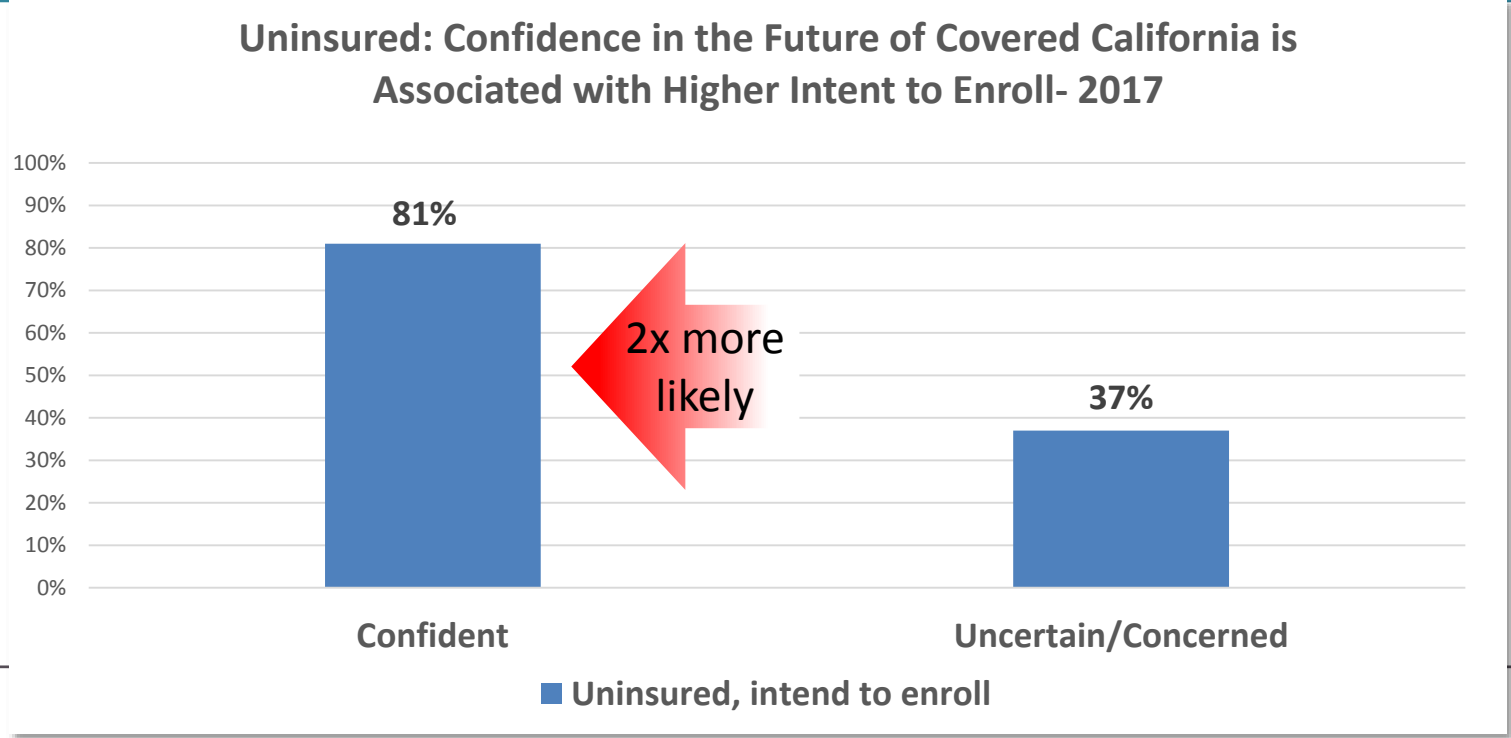
People who expect to be eligible for subsidies are much more likely to enroll.



CONFIDENCE POSITIVELY IMPACTS NEW ENROLLMENT

4

61% of uninsured say “the future of Covered California is uncertain.” For uninsured, those who are “confident” in the future of Covered California are twice as likely to intend to enroll in Covered California as those who are uncertain or “concerned.”



FOR MEMBERS, RENEWAL INTENT VERY STRONG

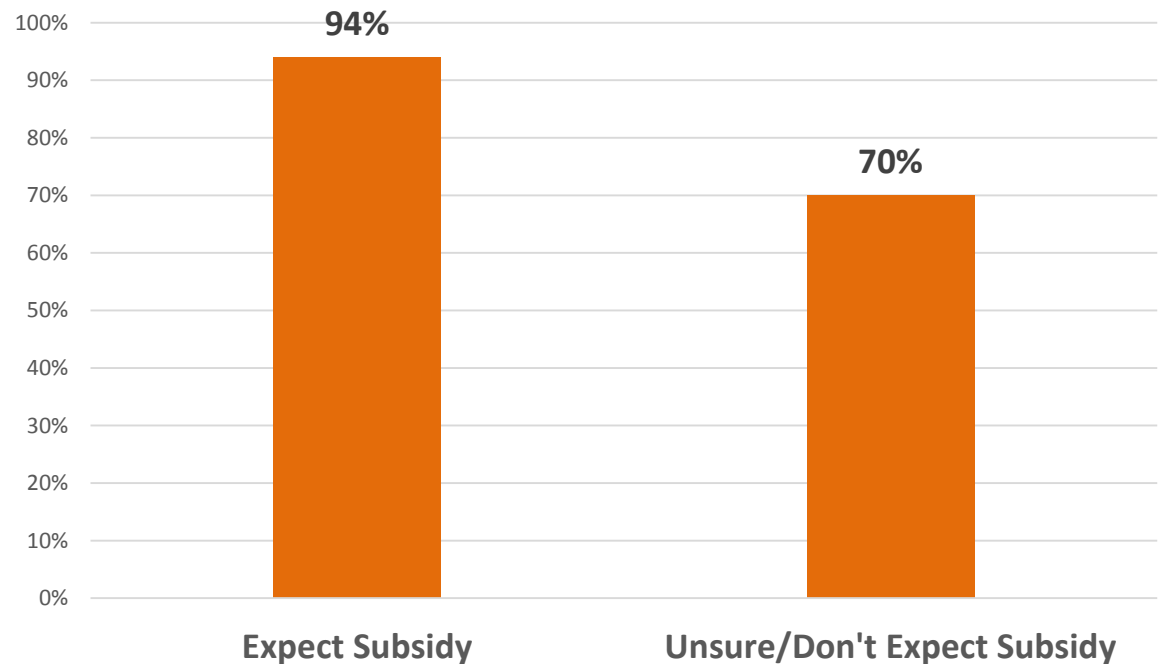
5

Members who expect to be eligible for subsidies are much more likely to renew.

88%

**Renewal Intent
of Members**

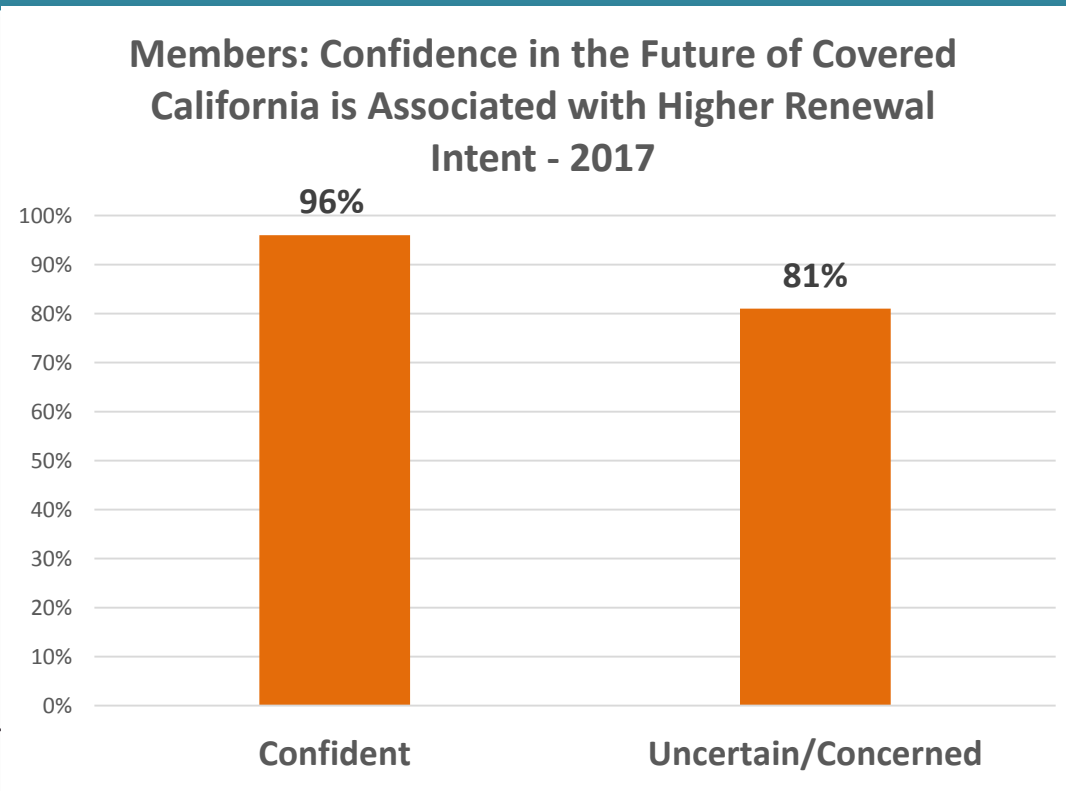
Members: Expectation of Subsidy Eligibility is Associated with Higher Intent to Renew - 2017



4 OUT OF 5 OF THOSE WHO ARE UNCERTAIN OR “CONCERNED” STILL INTEND TO RENEW

6

67% of members say “the future of Covered California is uncertain; however, confidence in the future of Covered California is associated with high renewal intent.



MARKETING ADJUSTMENTS

- We've adjusted the marketing campaign based on evidence:
 - Research found those who remain uninsured don't feel they need insurance – they are not sick or old
 - New creative shows “life can change in an instant, be covered when it does”
 - Amplified financial help message across all channels
 - Adjusted financial help message to:
 - “Financial help is available, so check for yourself to see what savings you qualify for.”
 - New message on stability and confidence
 - Vertical integration among creative elements

“INSTANT” TV ADS

“Instant”



English, Spanish, Asian languages (4)



VERTICALLY INTEGRATED MARKETING CAMPAIGN

Life can change
in an instant.



- Out-of-Home
- Radio
- Print
- Digital



La vida
te puede cambiar
en un instante.



APPENDIX

WAVE 2 SENTIMENT RESEARCH

- Conducted by Greenberg Strategy
- June 9-30, 2017
- Online survey, continuation of December 2016
- English and Spanish, 500 respondents

Report released on October 4, 2017 titled *“Wave 2: A Quantitative Study on Current Attitudes of Uninsured and Select Insured Californians Toward Health Insurance Coverage”*