

What Do Joint Replacement Candidates Really Want?

EXACTECH STUDIES REVEAL PATIENT PREFERENCES

Background

What factors influence a patient's decision to have joint replacement surgery? How do patients choose their surgeon? And what do patients think about innovative surgical technology, including ExactechGPS® Guided Personalized Surgery? Exactech contracted with the Dalton Agency, an independent Jacksonville marketing firm, to find out.

In February 2017, the firm worked to conduct public surveys targeting men and women over the age of 45 who either had joint replacement surgery within the past three years or were considering having it within the next two years. The extensive survey analyzed the preferences of hip, knee or shoulder replacement surgery patients.

Additionally, in August 2019, Exactech conducted two in-person focus groups in Gainesville, Fla., at two independent senior recreation facilities. These focus groups helped researchers gain a deeper understanding of the decision-making process surrounding joint replacement surgery.

Objectives

The surveys and focus groups had the same overall objectives:

1. To measure the factors and types of information that influence the decision to undergo joint replacement surgery.
2. To measure customer awareness of new technologies for joint replacement surgery.
3. To measure the appeal of ExactechGPS.
4. To measure consumer attitudes and lifestyle indicators to guide the development of marketing communications for ExactechGPS.

Key Findings

What factors influence the decision to have joint replacement surgery?

The most important factors in the decision are:

- A recommendation from an orthopaedic surgeon
- The desire to return to a normal lifestyle
- Pain level

CONSIDERING

96%

A RECOMMENDATION FROM AN ORTHOPAEDIC SURGEON

95%

RETURNING TO A NORMAL LIFESTYLE

95%

THEIR LEVEL OF PAIN

HAVE HAD

95%

RETURNING TO A NORMAL LIFESTYLE

90%

THEIR LEVEL OF PAIN

88%

A RECOMMENDATION FROM AN ORTHOPAEDIC SURGEON

Most respondents considering joint replacement surgery had sought treatment for joint pain. A small majority of respondents consulted a general practitioner about the pain as compared to those who consulted an orthopaedic surgeon.

In choosing an orthopaedic surgeon for their joint replacement, survey respondents said they look for a surgeon that is “in high demand and has a good reputation” and that they place importance on a “surgeon who uses the latest in computer-assisted technology.”

Respondents’ biggest concerns about joint replacement included the possibility of device rejection and subsequent infection. Also notable is the fact that 82 percent of survey respondents would “seek a second opinion before any major surgery.”

What levels of awareness do consumers have of new technologies for total joint replacement surgery?

The majority of survey respondents had “no awareness” of new technology, yet a majority expressed that they would be “very comfortable” or “somewhat comfortable” with computer-assisted joint replacement surgery, expressing greater comfort than familiarity with new technologies. Those who reported being “very comfortable” with computer-assisted surgery, felt that the device would provide “greater accuracy” and “less error.” Respondents who were less comfortable with the idea, felt that “machines can fail/make mistakes.” Respondents were less comfortable with the use of robotics and custom instruments in joint replacement.

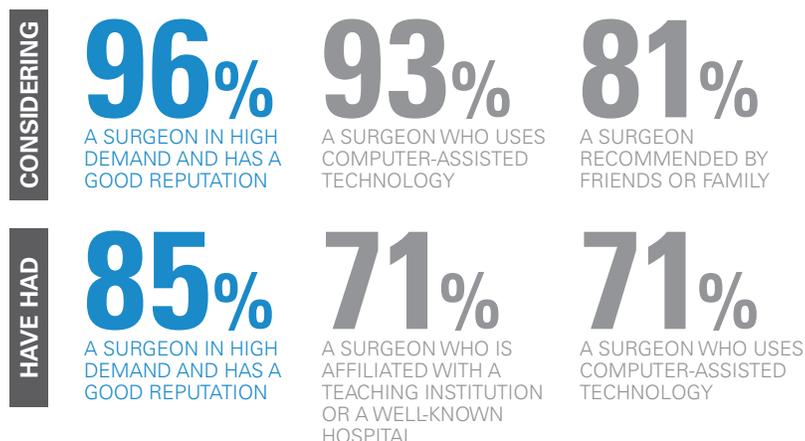
What is the appeal of technology like ExactechGPS?

Focus group participants reported that while they had heard of robotics used in surgery, they had very little knowledge of computer-assisted surgery. Participants said computer-assisted surgery “seems more exact.” Furthermore, they wanted to know the “long-term outcomes of procedures that have been done using the technology,” explaining that they “didn’t want to be the guinea pig.”

Ninety-four percent of survey respondents said they would be “very likely” or “somewhat likely” to consider using a technology like ExactechGPS technology if their surgeon proposed it. Sixty-two percent of those respondents were “very likely” to consider it. Eighty-five percent of those same respondents also said that they would be “very likely” to seek a surgeon who uses ExactechGPS-like technology.

What factors influence your choice of surgeon?

The majority of respondents seek a surgeon who is in high demand, has a good reputation and uses the latest in computer-assisted technology.



Have you heard about advanced surgical technologies?

Patients are somewhat aware (24 percent) about advanced surgical technologies, creating a key opportunity for communication programs that create awareness.



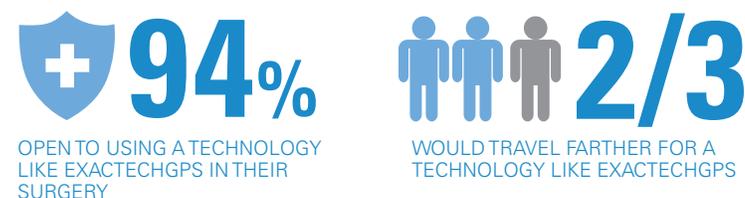
What level of comfort do patients have with new technologies?

Eighty-seven percent of those considering joint replacement surgery said they prefer computer-assisted surgery over custom instrumentation or robotics.



How appealing is a technology like ExactechGPS?

Respondents would be likely to consider using if their orthopaedic surgeon recommended it. Additionally, two out of three patients would travel farther to a hospital that uses ExactechGPS.



What consumer attitudes and lifestyle indicators can guide the development of marketing and advertising related to ExactechGPS?

Survey respondents said that brochures, information from educational seminars and advertising from the hospitals, surgeons or medical suppliers they frequently interact with influence their medical decision-making process. When asked which ExactechGPS advertising headlines appealed more to them, the majority of respondents preferred headlines that didn't include the name of the specific joint they needed replaced, for example, "Precision and Accuracy for Your Joint Replacement Surgery."

Respondents reacted positively to phrases associated with surgical precision, including "minimally invasive," "perform more accurately," "reducing the probability" and "has been extensively tested."

Ninety-three percent of survey respondents "strongly agreed" or "agreed somewhat" with the statement that technology has greatly improved their lives, and the same percentage of respondents said they "enjoy learning about new things." Both responses indicate that these consumers are likely to be receptive to new technologies.

Socially, a majority of survey respondents said they feel they live an "active lifestyle" and feel "younger than their age." They enjoy "being outdoors" and "like participating in outdoor recreational activities."

Choosing from 18 general attitudes and lifestyle statements, patients agreed most strongly with two:

92% "TECHNOLOGICAL ADVANCEMENTS HAVE GREATLY IMPROVED OUR LIVES."
92% "I ENJOY LEARNING ABOUT NEW THINGS."

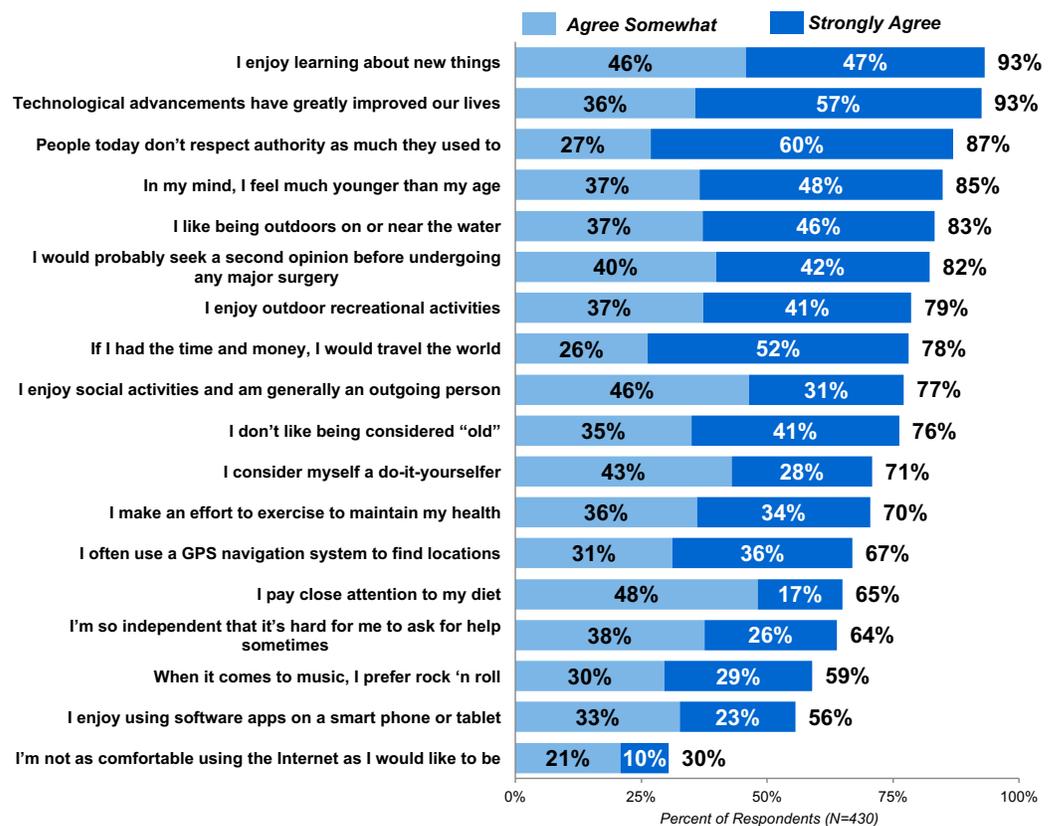
Effective educational support, such as brochures and information from educational seminars, were found to be very influential to both groups of patients.

Focus group participants shared that they typically get medical information from friends and family they trust first, especially friends in the medical profession, prior to researching online. Participants shared a general distrust in paid advertisements, both print and online.

Participants also shared a distrust in television and newspaper advertisements. Despite this distrust, what resonates most with them in advertising is research, clinical data, results or new surgical methods. They later conduct online research on those specific concepts to determine their validity. Both groups said they do trust advertisements with information about seminars and like to attend seminars where surgeons are speaking.

How strongly do you agree or disagree with the following attitude and lifestyle statements?

Responses to the 18 lifestyle statements suggest that consumers who are considering or have had joint replacement surgery are **open-minded about new technology**, are **young at heart**, and are people who **enjoy an active lifestyle**. They would be receptive to communications that speak to their intellectual curiosity and zest for life.



Methodology

Hip, Knee and Shoulder Replacement Patient Preferences Survey Method

430 respondents participated in the hip, knee and shoulder replacement patient preference survey conducted from February 17 through February 22, 2017.

Respondent Screening Criteria

- Must be age 45 or older
- Must be “very likely” or “somewhat likely” to consider having hip, knee or shoulder replacement surgery within the next two years or have had hip, knee or shoulder replacement surgery within the last three years

Respondents were recruited from the online panel of Research Now, a global provider of internet panel respondents. Research Now maintains a panel of hundreds of thousands of respondents who have agreed to participate in survey research in return for rewards that vary by the length and complexity of the questionnaire.

The respondents were not aware that the research was being conducted on behalf of Exactech or by the Dalton Agency. Descriptions of the product did not refer to ExactechGPS by name. Please note that the charts and tables presented in this report are subject to rounding error. Responses to questions for which we accepted multiple responses will sum to more than 100 percent because respondents could provide more than one answer.

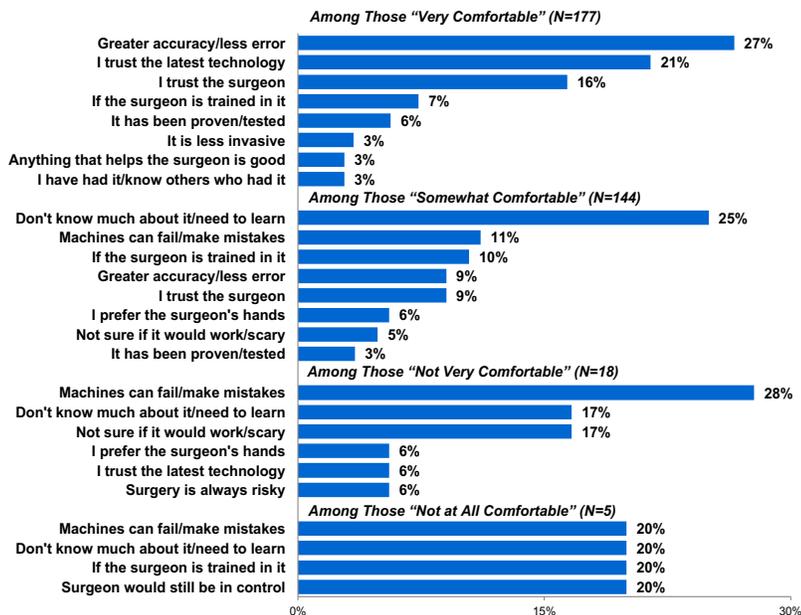
Online panel survey samples are not considered to be true probability samples, and therefore have no calculable margin of error. The charts and tables presented in this report are subject to rounding error. Responses to questions for which we accepted multiple responses will sum to more than 100 percent because respondents could provide more than one answer.

Focus Group Method

Exactech marketing personnel held two focus groups: the first on August 19, 2019, at the ElderCare Senior Recreation Center in Gainesville, Florida, and the second on August 22, 2019, at the Village at Gainesville, an independent living, memory care and assisted living community. Nine seniors attended the focus group at the Senior Recreation Center and eight seniors and one caregiver attended the focus group at the Village at Gainesville. Both focus groups were conducted by the same three Exactech employees.

The participants were aware that the research was being conducted by Exactech and were informed that the answers they provided would be anonymously attributed in any forthcoming reports.

Why would you be comfortable — or uncomfortable — with computer-assisted surgery?



“I feel the computer would be able to guide the surgeon to the specific areas needed to be invaded.”

Focus Group Participant Criteria

- Must be age 45 or older
- Must be considering having joint replacement surgery or have had joint replacement surgery

Focus group participants were asked to answer a few questions openly and honestly and were then asked to give feedback on a few sample advertisements for the ExactechGPS technology.

Focus Group Questions

- Do you have arthritis or joint pain?
- Have you had a joint replacement?
- How do you get your health information?
- How do you find doctors?
- Would you choose a surgeon based on their use of technology?

About ExactechGPS

ExactechGPS® Guided Personalized Surgery is an advanced technology platform that provides real-time visual guidance in total knee and shoulder replacement surgery. Customized for surgeon preferences and patient indications, ExactechGPS is a powerful addition to the surgical team’s goals of achieving precision and accuracy through an efficient solution. Please visit www.ExactechGPS.com for more information.