



2016 Communications Survey

Findings & Implications Report

October 17 Board Meeting

Research conducted by:



A service of Maryland Health Benefit Exchange

The purpose of this research effort is to:

- ✘ Measure awareness and attitude levels regarding Maryland Health Connection (MHC).
- ✘ Evaluate the effectiveness of communication strategies regarding MHC among the representative, statewide audience.
- ✘ Identify implications and recommendations for the design of the MHC communication outreach.

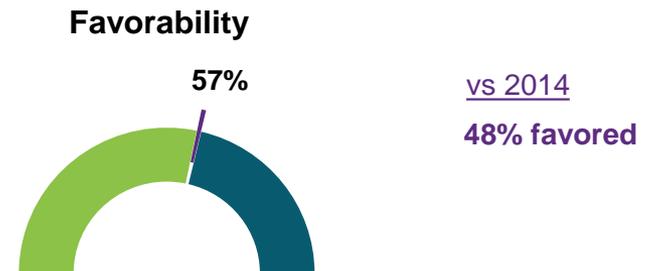
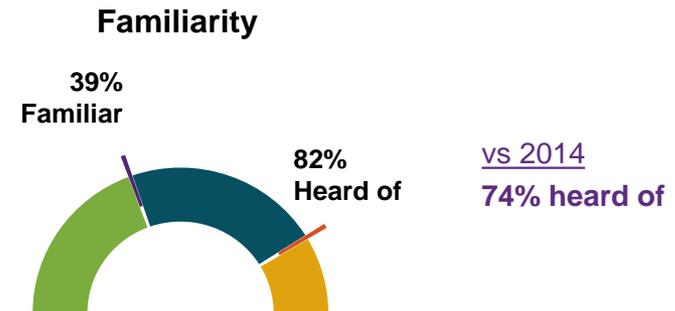
- ✘ A 20-minute survey was administered to 905 Maryland residents. The mode of administration included telephone and online survey.
- ✘ Fielding occurred between July 18, 2016 and August 28, 2016.
- ✘ In order to ensure a minimum representation of key demographics were included, the following quotas were established:
 - N= 63 Uninsured residents*
 - N= 100 African American residents
 - N= 100 Hispanic or Latino residents
 - N= 50+ per Connector region** (Based on June 2016 CE regions)
- ✘ Data is weighed to reflect the Maryland adult population on gender, age, geography and race/ethnicity.

* Weighted N = 58

**The only exception to this are the Eastern Shore counties; Upper Eastern Shore (n=47) and Lower Eastern Shore (n=18)

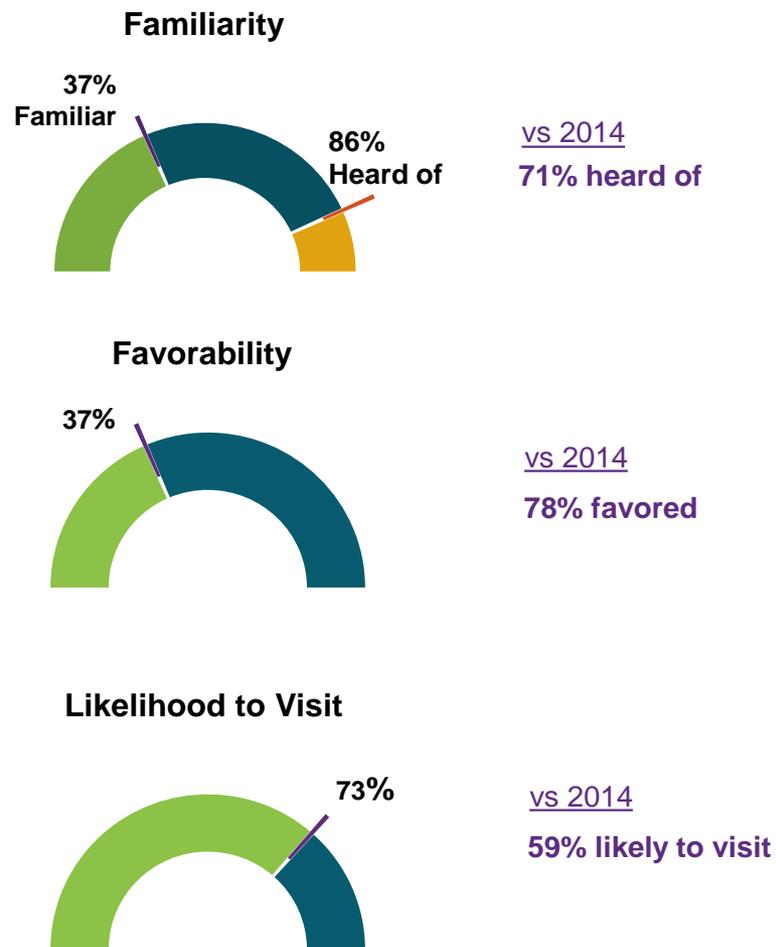
All Marylanders

- ✦ A majority of Marylanders (82%) have heard of Maryland Health Connection, more than one-third (39%) are familiar, and 29% visited the MHC website.
- ✦ Awareness (+8%), and likelihood of visiting (+12%) MHC has increased since 2014, indicating that current marketing approaches are proving to be effective.



Uninsured

- ✘ Less than 1 out of 10 Marylanders (6%) reported being without insurance.
- ✘ Although uninsured Marylanders' level of awareness increased (+15%) from 2014, their familiarity decreased (-3%).
- ✘ There was a considerable decrease in favorability with MHC among uninsured (-41%) compared to 2014. This is in contrast to the increase in favorability (+9%) all Marylanders reported.

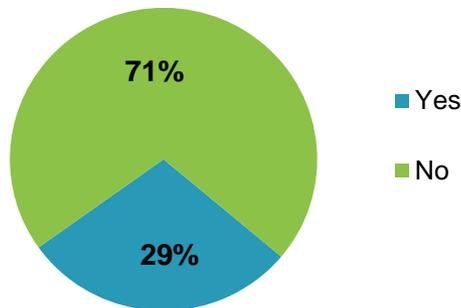


*At Risk Marylanders are those who reported having gone without insurance in the past five years or anticipate being without insurance in the next five year.

All Marylanders

- ✘ The most frequently cited reasons for visiting MHC include a desire to get insurance (52%) and general curiosity (13%).
- ✘ Of those who visited, more than half (58%) reported enrolling in health insurance through MHC.
- ✘ Those who experienced any difficulties reported technical problems (44%) and a lack of information on the website (18%).

Visited MHC – All Marylanders

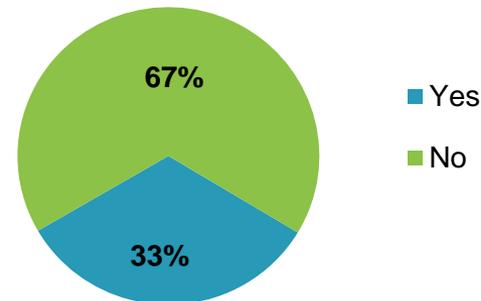


vs 2014
15% visited

Uninsured

- ✘ One third of uninsured (33%) visited MHC, 67% never visited MHC.
- ✘ Visitation was largely motivated by a need for insurance (62%).
- ✘ Uninsured were more likely to report a lack of information on the website (60%), and technical problems (20%).

Visited MHC – Uninsured

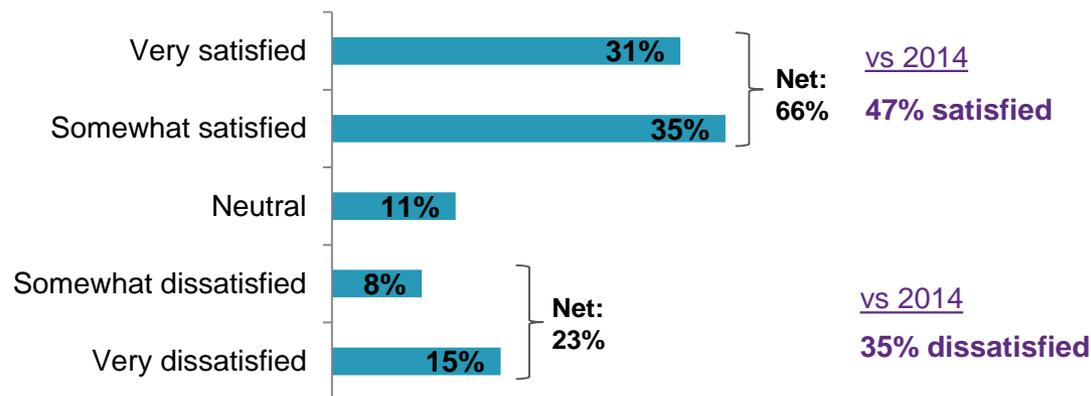


vs 2014
20% visited

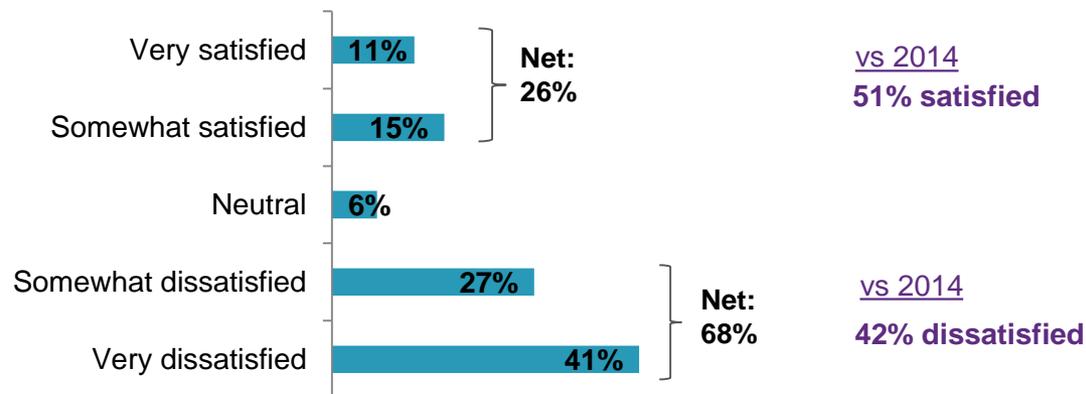
Satisfaction

- ✘ Visitors reported an increase in overall satisfaction with their MHC experience (+19%), compared to 2014.
- ✘ Although Marylanders reported overall satisfaction, this was not the case with the uninsured. Uninsured are largely dissatisfied (68%) with their MHC experience.
 - Three out of five (60%) reported lack of information on website.

Satisfaction – All Marylanders



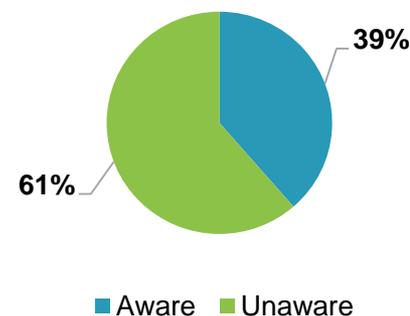
Satisfaction - Uninsured



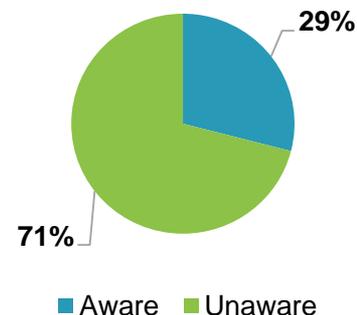
Awareness of Financial Help

- ✘ More than one-third of Marylanders (39%) are aware of subsidy eligibility, and about six out of ten (61%) are unaware.
- ✘ A majority of Marylanders (78%) would be interested in visiting MHC if they were subsidy-eligible.
- ✘ Less than one-third (29%) of uninsured were aware of subsidy eligibility.
- ✘ Almost half of uninsured (44%) don't know if they are subsidy-eligible.
- ✘ A majority of uninsured (91%) would be interested in visiting MHC if they were subsidy-eligible.

**Subsidy Awareness
(All Marylanders)**



**Subsidy Awareness
(Uninsured)**



All Marylanders

Top Motivations to visit MHC

- ✘ Learning I can't be denied a health plan
- ✘ Knowing health insurance protects my health and wallet

Top Messages

- ✘ MHC is the only place you can get financial help
- ✘ Ninety-two percent of Marylanders are covered

Important Information

- ✘ MHC is a one-stop shop for health insurance and lets you compare plans
- ✘ MHC is only place to get savings

Uninsured

Top Motivations to visit MHC

- ✘ Learning that I can afford a health plan
- ✘ Learning it's the only place I can get financial help

Top Messages

- ✘ MHC is only place you can get financial help
- ✘ MHC is home to top insurers

Important Information

- ✘ MHC is a one-stop shop for health insurance and lets you compare plans
- ✘ Free in-person help is available near you

Questions?

