

What Do Total Knee Replacement Patients Really Want?

A New Exactech Study Uncovers Patient Preferences

INTRODUCTION

What factors influence a patient's decision to have total knee replacement surgery (TKR)? How do patients choose a surgeon? And how open are they to innovative computer-assisted surgical techniques? These are a few of the questions Exactech, Inc., sought to answer through a recent public survey.

In March of 2013, Exactech contracted with the Dalton Agency, an independent Jacksonville marketing firm, to conduct the survey. The study targeted men and women ages 45 and over who have had TKR surgery within the past three years or who are considering having it within the next two years. A secondary goal of the survey was to measure consumer response to the new Exactech GPS® Guided Personalized Surgery.

The survey sought to answer four specific questions:

1. What factors influence the decision to have TKR surgery?
2. What levels of awareness do consumers have of new technologies for total knee replacement surgery?
3. What is the appeal of Exactech GPS?
4. What consumer attitudes and lifestyle indicators can guide the development of marketing communications for Exactech GPS?

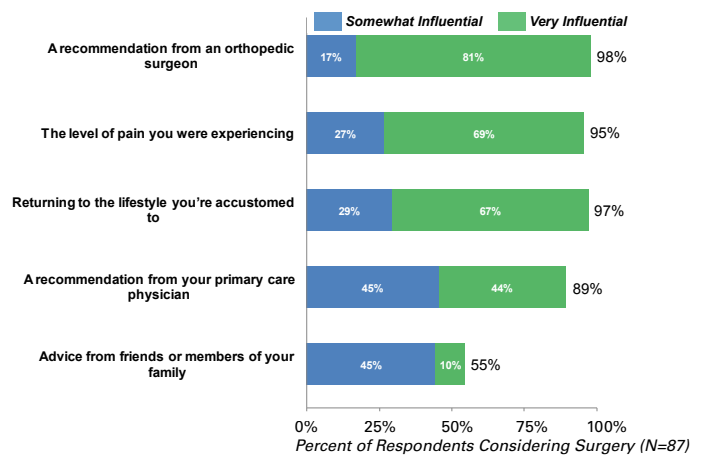
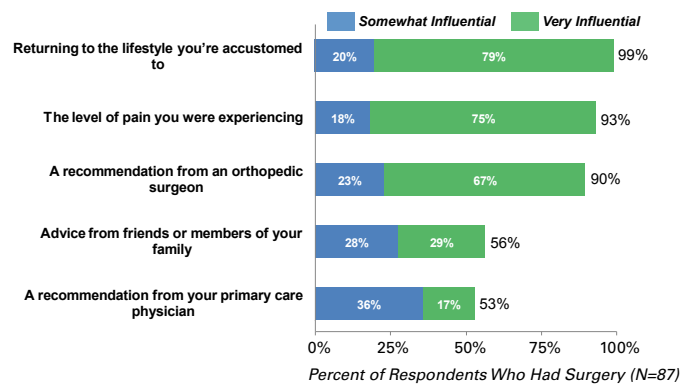
KEY FINDINGS

What factors influence the decision to have total knee replacement surgery?

The most important factors in deciding to have TKR surgery were (Figure 1):

- A recommendation from an orthopedic surgeon
- Pain level
- Desire to return to a normal lifestyle

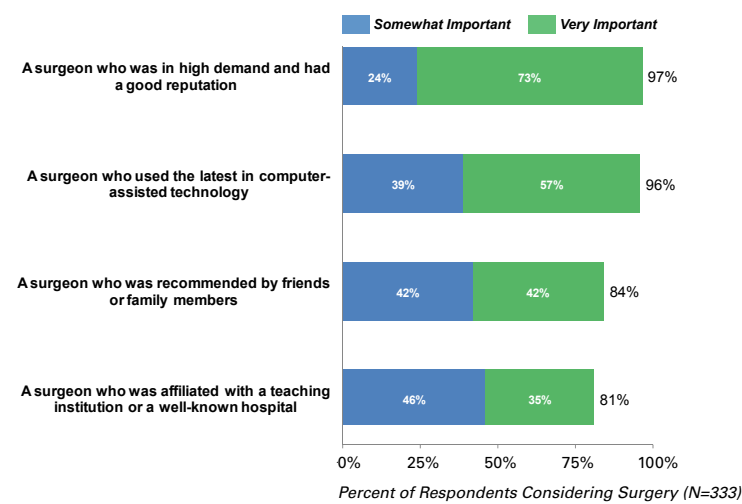
Figure 1. Influence of Factors in the Decision to Have TKR Surgery or Who are Considering TKR Surgery



In the factors that influenced, or would influence, their decision to have knee replacement surgery, there were few differences between those who had already had TKR surgery and those who were considering it. Over 90 percent of the respondents in both groups said that three factors were “very” or “somewhat influential” in their thinking: *a recommendation from an orthopedic surgeon*, the level of pain they were experiencing, and the desire to return to the lifestyle to which they were accustomed.

The most important factor in choice of surgeons was that the surgeon be “in high demand and has a good reputation.” **Strong majorities of those who have had or are considering TKR also place importance on a “surgeon who uses the latest in computer-assisted technology,”** is “recommended by friends or family members,” and is “affiliated with a teaching institution or a well-known hospital” (Figure 2).

Figure 2. Importance of Surgeon Characteristics in the Decision to Consider TKR Surgery



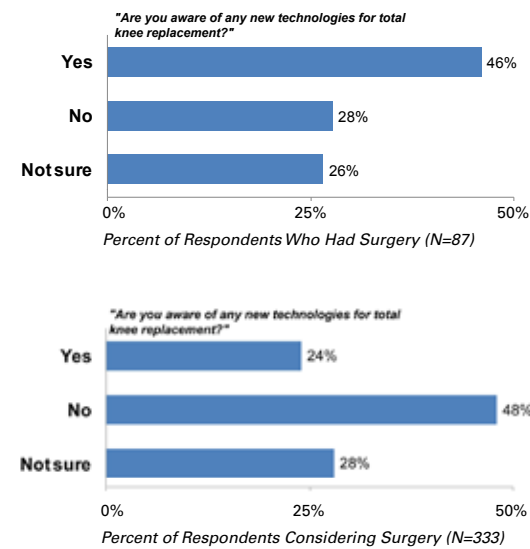
Among those who have had TKR surgery, the most important sources of information in deciding to have the surgery were brochures about the procedure and information from educational seminars.

Respondents in both groups expressed a strong desire for many kinds of information about knee replacement surgery. Those who were considering TKR were somewhat more likely than those who had TKR to say that information would be “very important” to them. They expressed their strongest need for three types of information: “how successful the surgery had been with other patients” (99 percent saying “very” or “somewhat important”), “how many times the surgeon had performed knee replacement surgery” (99 percent), and “whether the surgeon would use the latest techniques, like minimally-invasive surgery” (98 percent). Thus, while they focus on the surgeon’s personal expertise and experience, they also want to know that the surgeon is *familiar with the latest technology*.

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

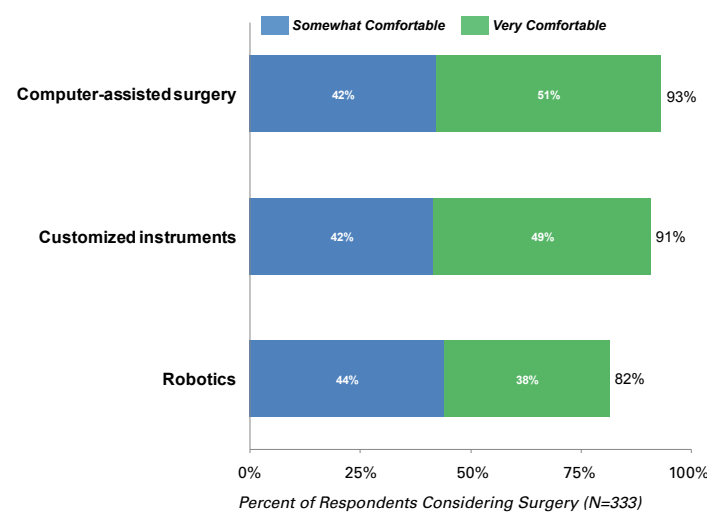
Nearly half of respondents said they were familiar with computer-assisted surgery (Figure 3).

Figure 3. Awareness of New Technologies for Knee Replacement Recipients and those Considering TKR Surgery



93 percent of those considering TKR surgery said they would be comfortable with computer-assisted surgery (Figure 4).

Figure 4. Comfort Level With Technologies the Surgeon Could Use



Most of the respondents were modest in declaring their awareness of new technologies for knee replacement surgery. 46 percent of those who had TKR, and 24 percent of those who were considering it, reported that they were aware of new technologies.

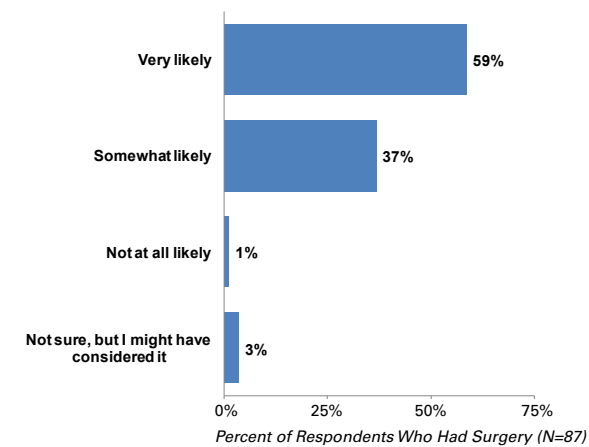
The respondents were more likely to say they were at least “somewhat familiar” with three new technologies for TKR. For example, 49 percent of those who were considering TKR said they were “very” or “somewhat familiar” with robotics, 48 percent were familiar with computer-assisted surgery, and 30 percent were familiar with customized instruments. 30 percent of those who already had TKR reported that their surgeon used customized instruments in their total knee replacement surgery, 28 percent had used computer-assisted surgery, and only 5 percent reported that robotics was used in their surgery.

Those who were considering TKR expressed fairly high levels of comfort with these new technologies. 93 percent would be “very” or “somewhat comfortable” with computer-assisted surgery, 91 percent would be comfortable with customized instruments, and 82 percent would be comfortable with robotics.

What is the appeal of Exactech GPS?

96 percent of TKR patients say they would have considered technology like the Exactech GPS if they had been aware of it (Figure 5).

Figure 5. Response to the Exactech GPS Concept Statement for those who have had TKR Surgery



The general concept statement for Exactech GPS was met with strongly positive responses from both groups of respondents.

96 percent of those who already had TKR said they would have been “very likely” or “somewhat likely” to consider using the GPS technology if their surgeon had recommended it. 95 percent of

those who were considering TKR were “very” or “somewhat likely” to consider it, including 69 percent who said they would be “very likely” to do so.

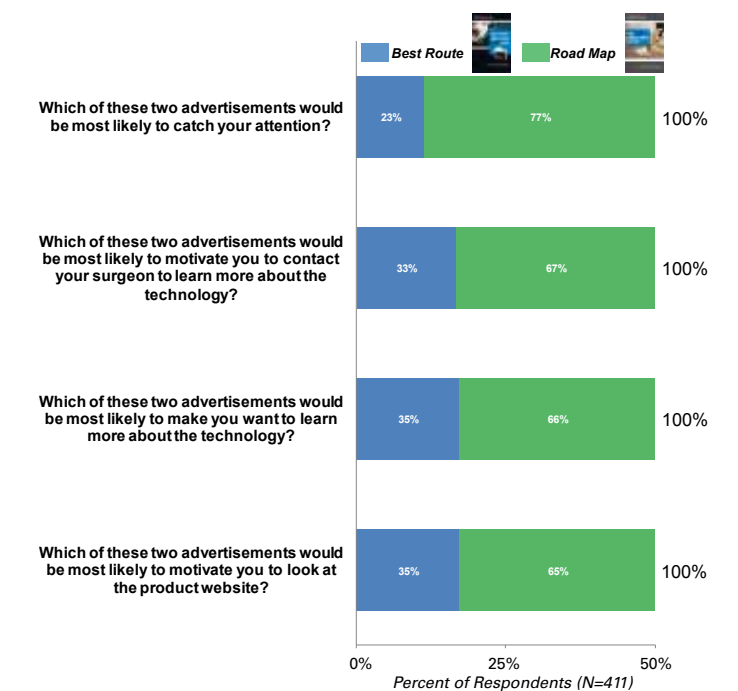
When asked to indicate which words or phrases they liked most in the concept statement, both those who had TKR and those who were considering TKR “liked” the same 5 phrases:

- “with minimal invasion” (clicked on by 63 percent of those considering TKR)
- “perform more accurate” (62 percent)
- “with greater precision” (54 percent)
- “reducing the probability” (53 percent)
- “has been extensively tested” (49 percent)

The measurement of preferences between the two advertising concepts produced a clear winner: 77 percent of the respondents said that the advertisement would be most likely to catch their attention. 67 percent said it would be most likely to motivate them to contact their surgeon, 66 percent said it would be most likely to make them want to learn more about the technology, and 65 percent said it would be most likely to motivate them to look at the product website.

A “hot spot” exercise showed that respondents were most likely to look at the runner’s knee. This reflects the fact that the desire to return to an active lifestyle is a prime motivator in the consideration of total knee replacement surgery, and that advertising that addresses that desire could be more effective than advertising that focuses on the surgeon or the technology itself. The technology is a means to the end that the consumer desires (Figure 6).

Figure 6. Preferences Between the Two Advertising Concepts

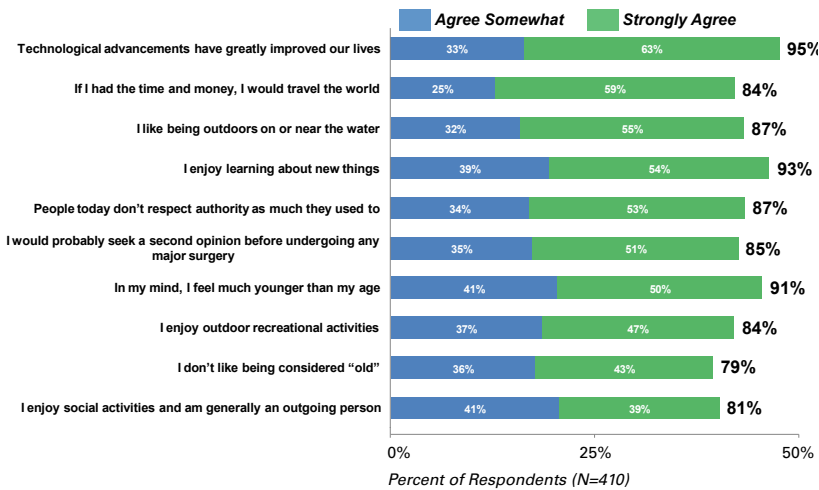


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What consumer attitudes and lifestyle indicators can guide the development of marketing communications for Exactech GPS?

Among 18 general attitude and lifestyle statements, respondents gave the highest level of agreement to: “Technological advancements have greatly improved our lives.” (Figure 7).

Figure 7. Agreement with Attitude and Lifestyle Statements



The responses to 18 attitude and lifestyle statements showed strong consensus among all respondents on several dimensions. One dimension represented the belief that technology has “greatly improved our lives.” 95 percent of the respondents “strongly agreed” or “agreed somewhat” with that statement. 93 percent also agreed that they “enjoy learning about new things,” suggesting an open mind and inquiring spirit.

Another dimension reflected the desire for an active lifestyle. 87 percent agreed that they enjoy “being outdoors on or near the water,” and 84 percent agreed that they “enjoy outdoor recreational activities.”

METHODOLOGY

After screening a total pool of 3,814 respondents, 420 were deemed qualified to participate in the study, which was conducted online from March 5 through March 8, 2013. 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, Inc. or by the Dalton Agency. Descriptions of the product did not refer to Exactech GPS 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.

ABOUT EXACTECH GPS®

The groundbreaking Exactech GPS® Guided Personalized Surgery is an advanced technology platform that provides real-time visual guidance and anatomic landmark verification in total knee arthroplasty. Customized for surgeon preferences and patient indications, Exactech GPS is a powerful addition to the surgical team’s goals of achieving precision and accuracy through an efficient cost-effective solution. Combined with the Optetrak® lineage of knee products, Exactech GPS provides the best of both worlds – a proven implant design foundation¹ enhanced by the most modern surgical technologies. Please visit ExactechGPS.com for more information.