



Don't Guess, Know!

How AdventHealth Leverages Location Analytics to Unlock Market Growth, Evaluate New Opportunities, and Gain Insights into Market Dynamics, Competition, and Patient Segmentation



Speakers



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success

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01

About



Introduction



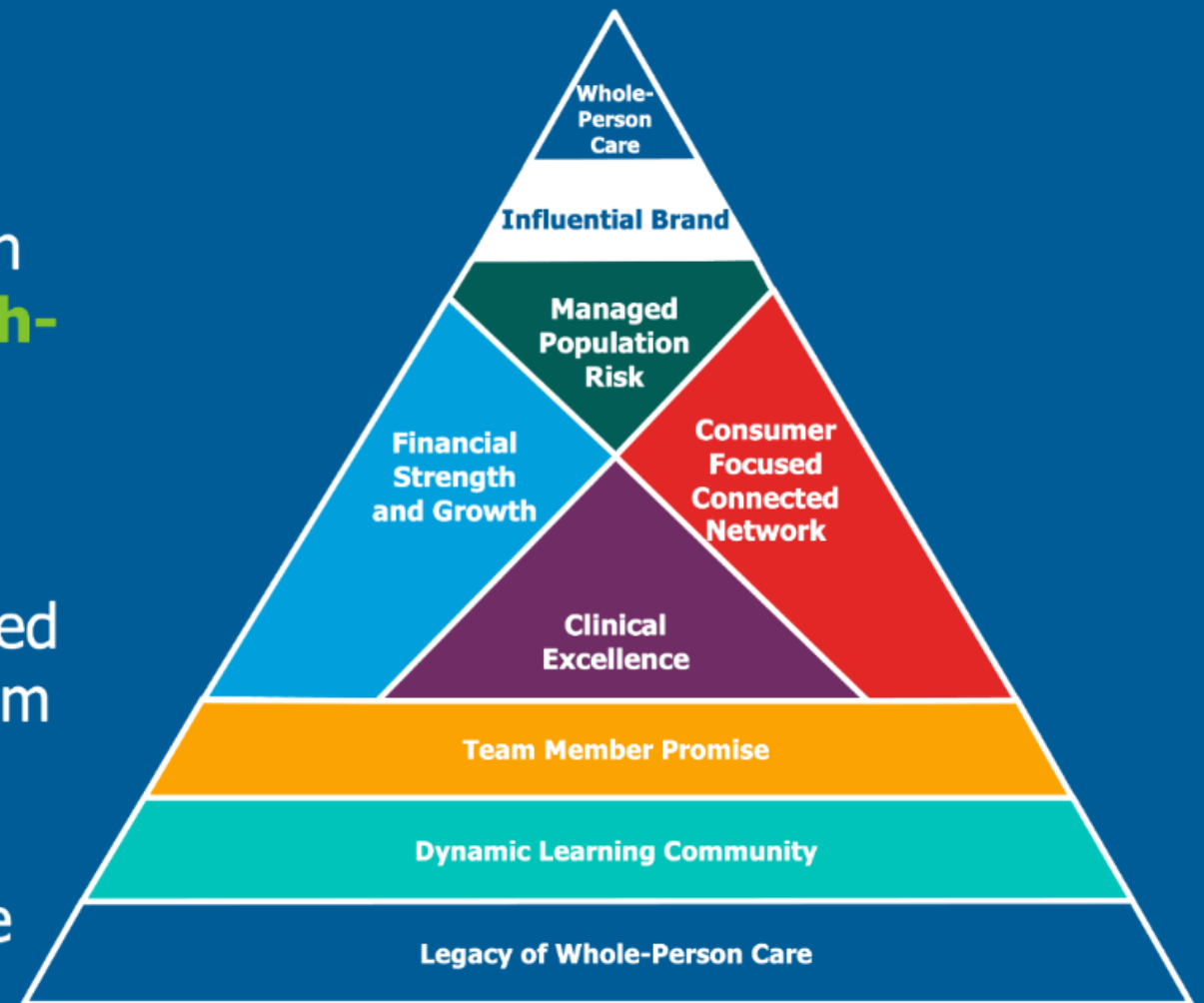
Placer.ai



VISION 2030

Driven by our mission of providing holistic care to all people, AdventHealth will be known for our **preeminent, faith-based, consumer-focused clinical care**.

This reputation—which makes us a trusted household brand by 2030—will result from the realization of our **strategic aspirations** and will promote our continuing efforts to help those we serve **feel whole**.



Our Footprint

- 1973 AdventHealth was established
- 9M+ Patient encounters
- 105,000+ Team members
- 4,500+ Employed providers
- 56 Hospital campuses in nine states
- 17 Home health and hospice facilities
- 58 Urgent care facilities
- 27 Offsite EDs



Placer.ai is the Leader in Location Intelligence

Placer.ai is the most advanced location analytics platform describing physical locations, the people and businesses that interact with them, and the markets they inhabit.

Placer is loved and trusted by:



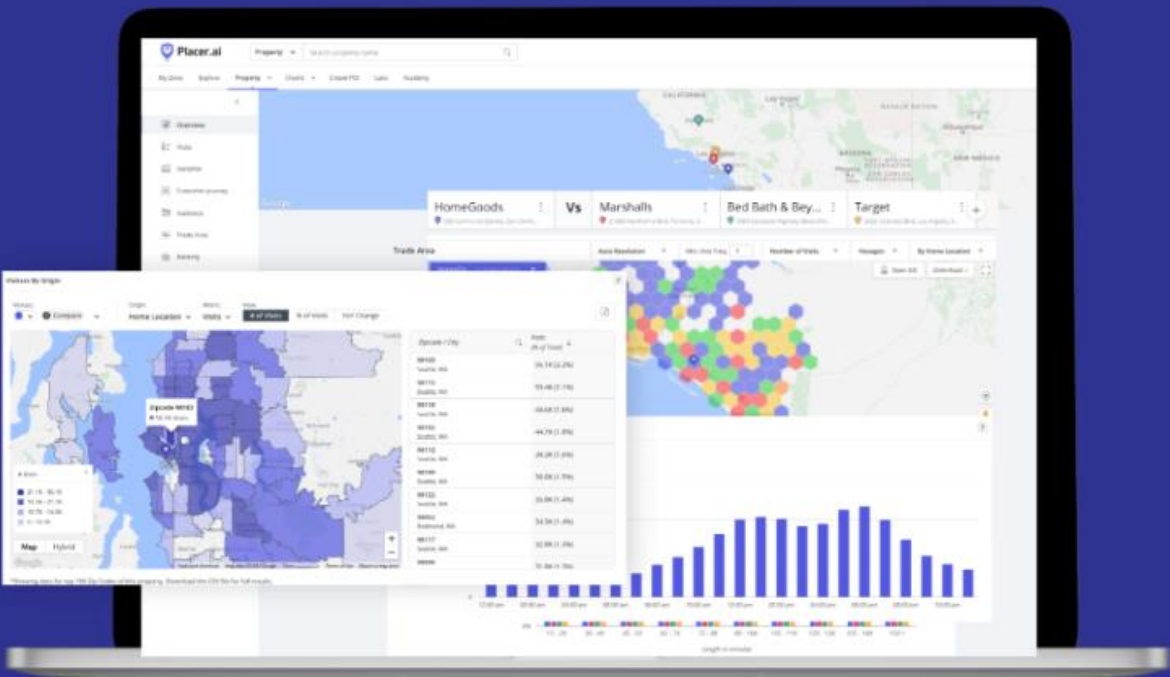
4,700+
CUSTOMERS



30+
INDUSTRIES



25+
PUBLIC REITs



HEALTHCARE PROVIDERS






















RETAIL







CRE







CPG







FINANCE







CIVIC







MEDIA







Actionable Insights To Fuel Your Ambulatory Strategy

Leverage location analytics to expand your healthcare network
and meet patient demand



**Gain Competitive
Insights & Benchmark**



**Understand Populations
& Consumers**



**Identify Growing Markets
& Ideal Sites**

01 Observe
Human Movement

Privacy-safe foot traffic data from tens of millions of mobile devices forms an aggregated view of US commercial activity.

02 Analyze
Every Location

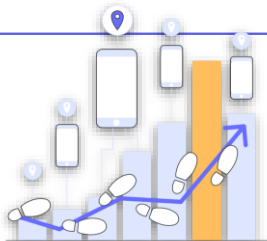
Machine learning accurately describes human movement throughout the U.S., from specific POIs to chains, markets, and regions.

03 Enhance
with 360° Data

Visitation data is enhanced with Placer Marketplace 3rd party datasets that further describe businesses, consumers, and markets.

04 Generate
Actionable Insights

Robust, statistically significant insights into how people and places interact are presented via an intuitive UI, data feeds, or the Placer API.



02 Use cases



Use cases and early success

- New competitor impact analysis
- New Location Analysis
- Market development
- M&A

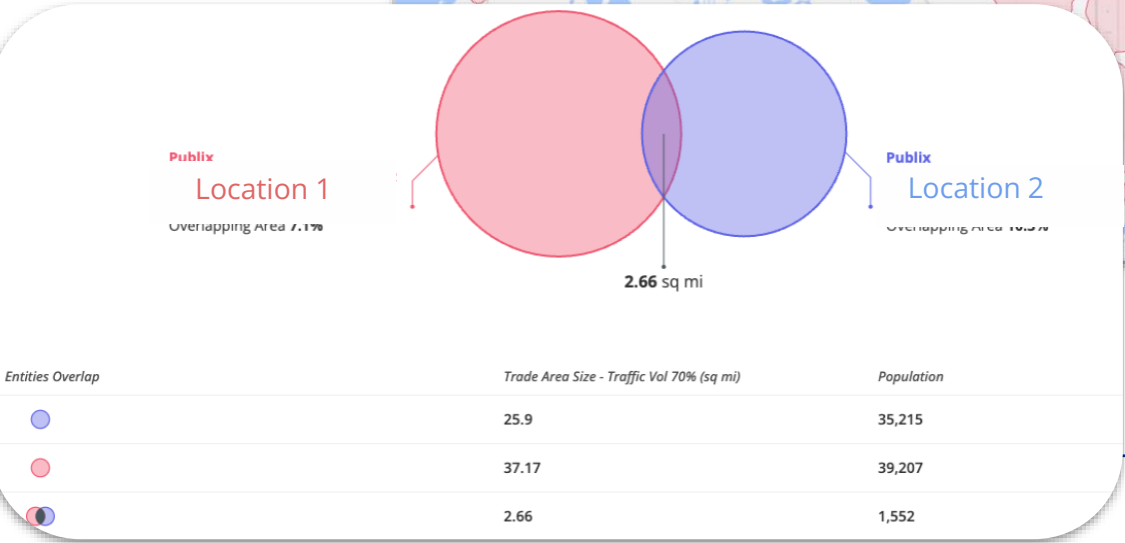
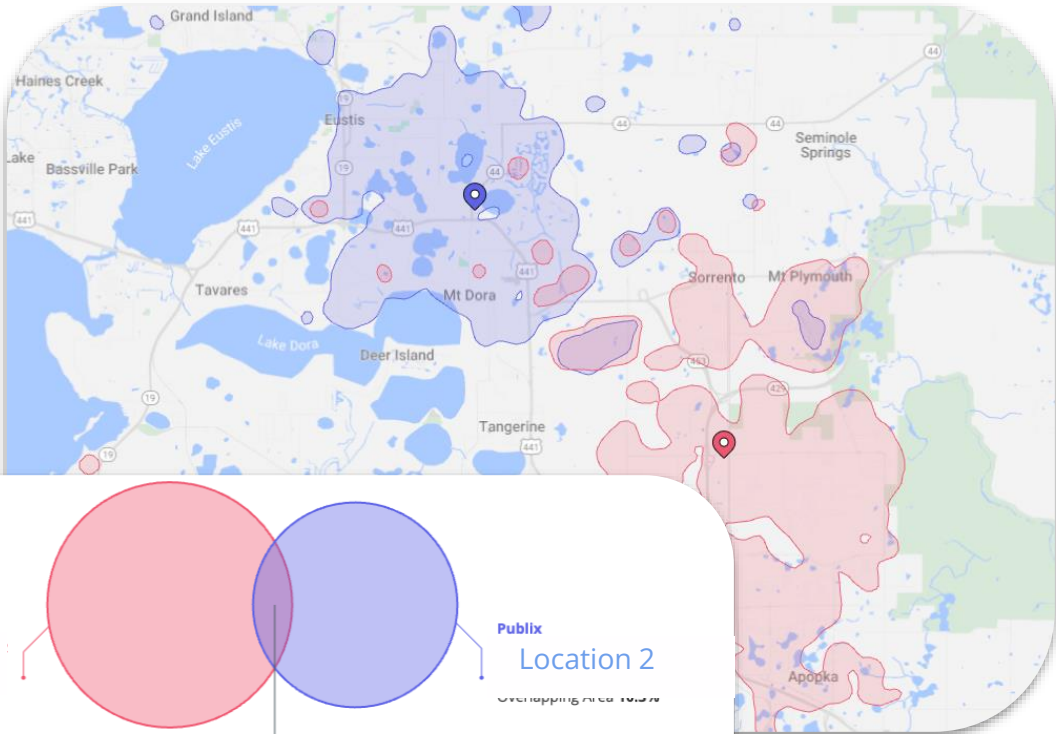
New Location Analysis - FSED Placement

The Problem

Advent is hoping to service a new market in Florida & is wondering how many FSEDs would be needed to service the area.

Placer's Solution

Leveraging true trade area (aka 'where can we expect visits from') by using other proxies, allowed Advent to realize the overlap is fairly limited and there's a clear need for 2 different FSEDs

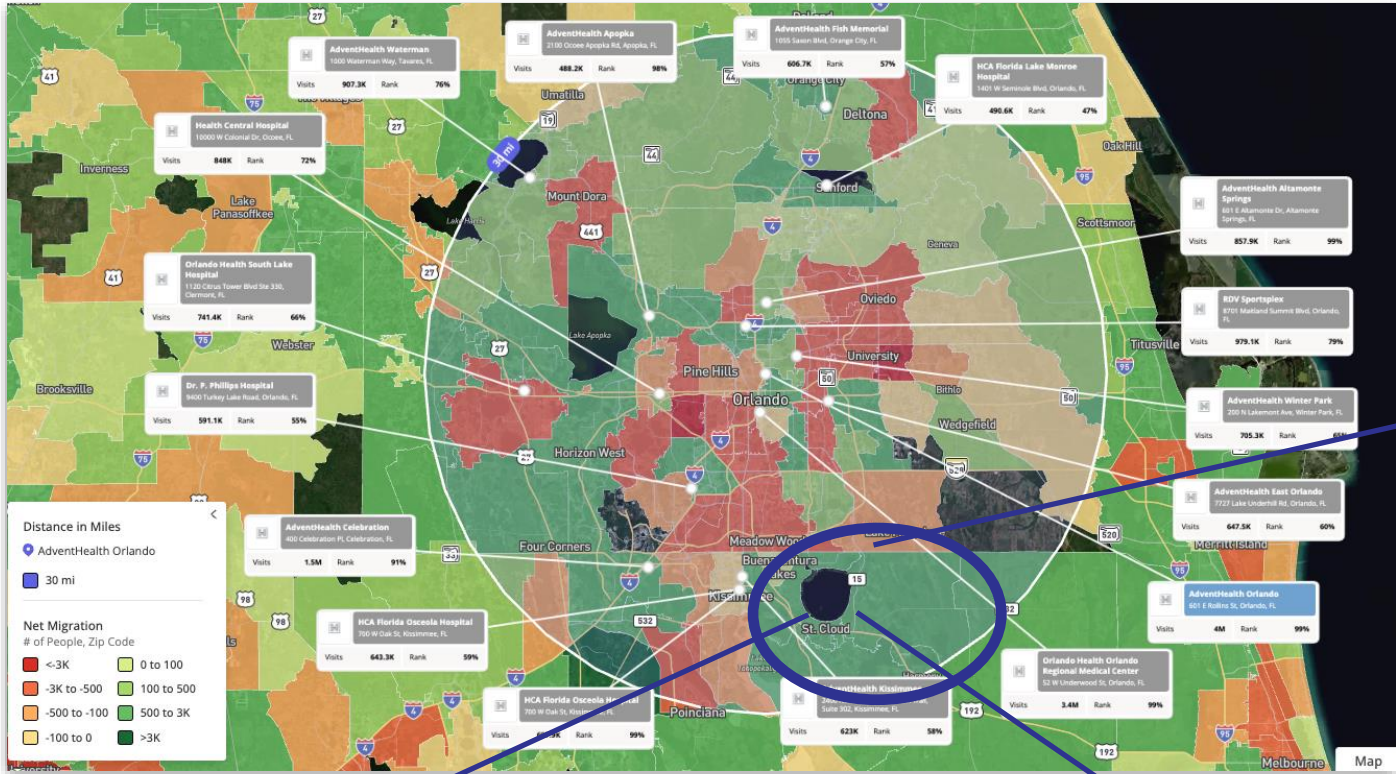


Answer questions like...

Q: Do I need a single location or more to serve a target market?

Q: Can I use proxy to understand people's actual willingness to commute to a location?

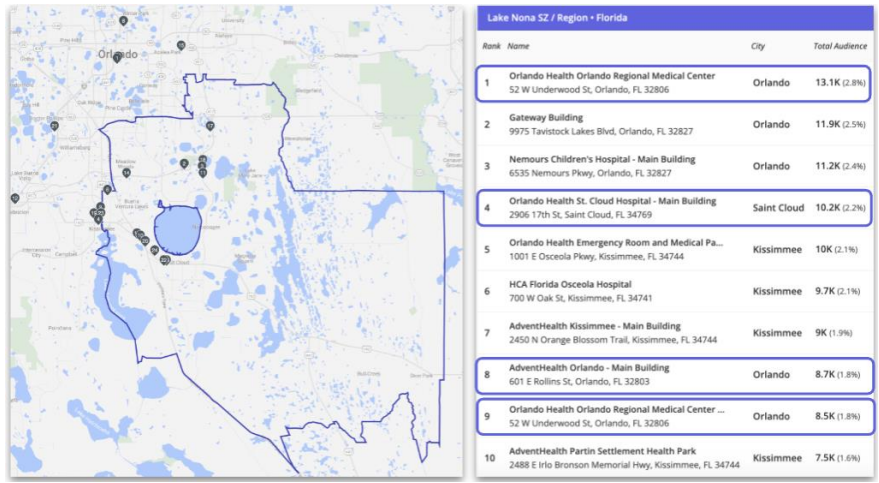
Market development: population growth, demographics and preference



1 High population growth w/o close proximity to healthcare

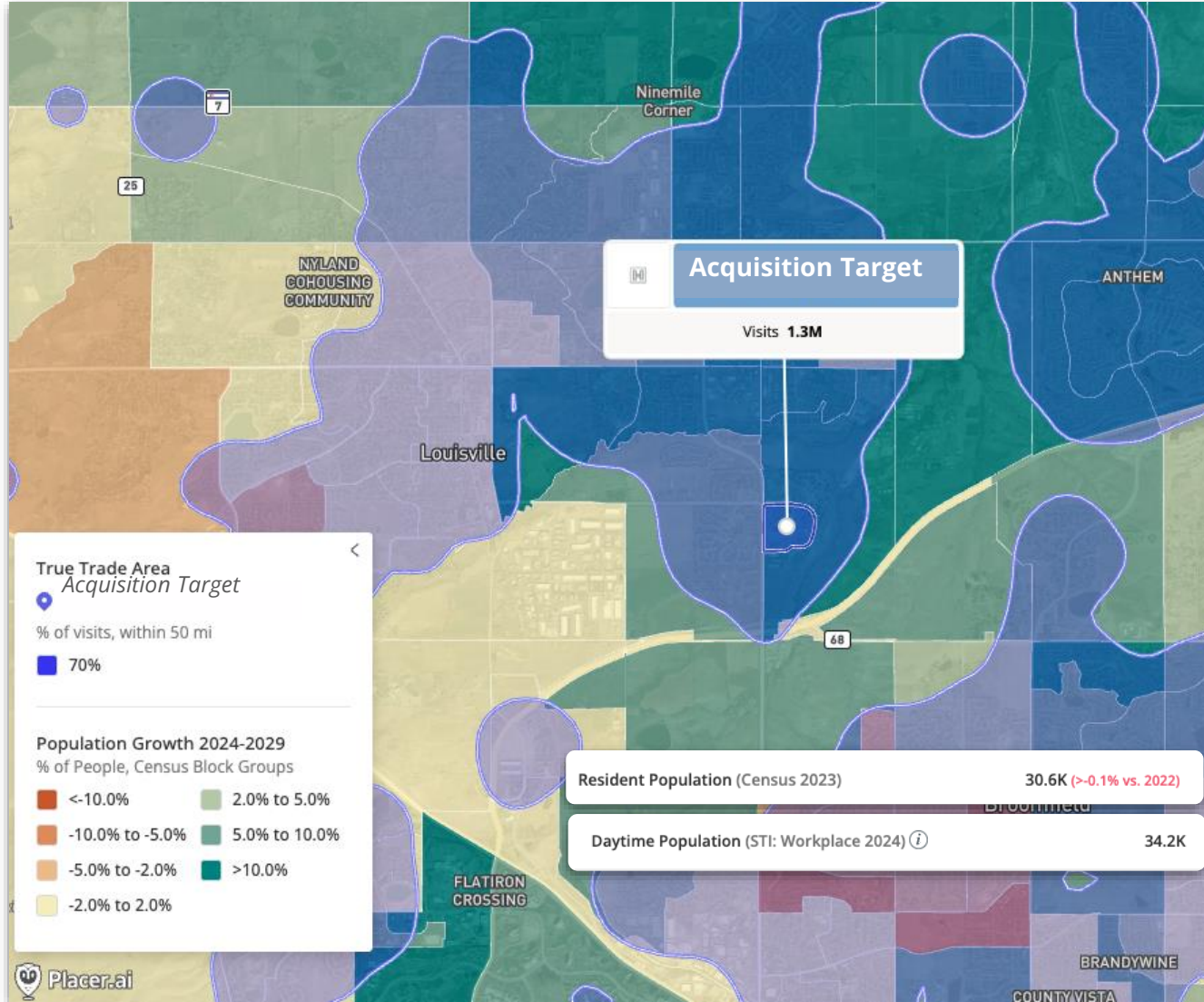
Audiences	Median Household Income	Most Common Ethnicity	Bachelor's Degree or Higher	Persons per Household
Residents	\$86.4K	Hispanic (Ethnic) (52.1%)	34.6%	3.00
Employees	\$79.4K	Hispanic (Ethnic) (49.8%)	33.6%	2.90
Out-of-Market Visi...	\$77.5K	White (44%)	37.9%	2.57
Florida Residents	\$75K	White (52%)	33.4%	2.48

2 Demographic insights



3 Consumer Preferences

M&A analysis: location data insights into evaluation process




Methodology

- 1 Macro: Population growth projections
- 2 Location drilldown
 - Cannibalization
 - Brand awareness
 - Competition density
 - Demographic fit
- 3 Force ranking opportunities

Scoring assets by different factors including competition density and demographic fit

Acquisition Target Analysis



Relative Score ? **83%** B

The score is relative to AdventHealth Colorado locations nationwide

Trade Area Population	764K
Tag Median: 477K ✓ Market Median: 174K ✓	
Demographic Fit	88%
Market Median: 62% ✓	
Cannibalization (% of ppl overlap)	56%
Tag Median: 47% ! Market Median: 0% !	
Competition Density (per 100k ppl)	2.0
Tag Median: 2.3 ✓ Market Median: 1.3 ✓	

Match Analysis

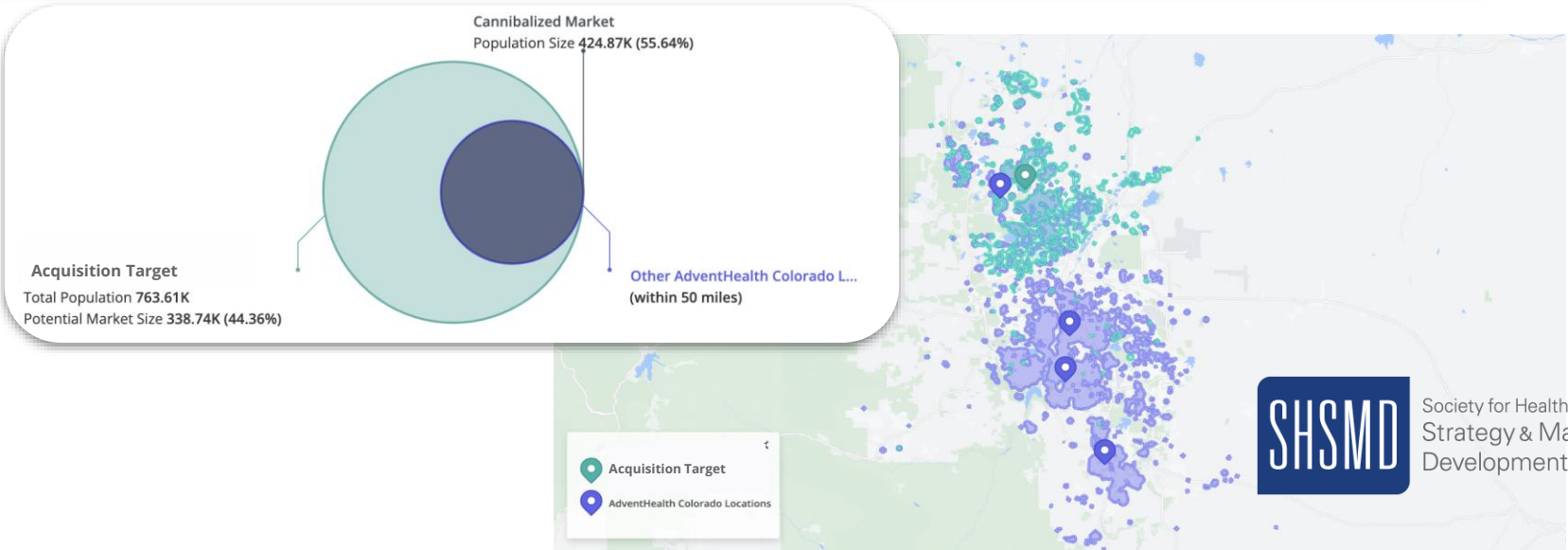
Entity analyzed using True Trade Area

AdventHealth Colorado

↔

Acquisition Target

Trade Area Population 764K <small>Higher than 76% of the tag's locations nationwide</small>	Demographic Fit 88 <small>Similarity between the entity trade area population and tag's visitor demographic...</small>	Cannibalization 56% <small>Higher than 76% of the tag's locations nationwide</small>	Competition Density 2 <small>Lower than 100% of the tag's locations nationwide</small>
Category Entity	Average Monthly visits N/A <small>Avg. monthly visits to the location</small>	Nearest Location 3.4 mi <small>Nearest tag's location to the Entity</small>	Frequent Co Tenants 2 <small>Entity tenants that are frequently located next to tag's</small>



Brand awareness: some overlap and referencability exist between asset and own facilities

Insights:

- Asset already has 10% of visitors overlap with own facility, indicating strong referral opportunity
- Asset has a comparable breakdown in terms of insurance mix breakdown

Acquisition Target

AdventHealth Location

Health Insurance				
Employer based health insurance only	417,414 (56%)	<div><div></div><div></div></div> 114	292,487 (57%)	<div><div></div><div></div></div> 116
Medicaid/means-tested public coverage only	91,966 (12.3%)	<div><div></div><div></div></div> 92	56,631 (11%)	<div><div></div><div></div></div> 82
No health insurance coverage	54,378 (7.3%)	<div><div></div><div></div></div> 95	36,437 (7.1%)	<div><div></div><div></div></div> 92
Direct purchase health insurance only	44,624 (6%)	<div><div></div><div></div></div> 87	39,439 (7.7%)	<div><div></div><div></div></div> 112
Medicare coverage only	40,753 (5.5%)	<div><div></div><div></div></div> 89	26,915 (5.2%)	<div><div></div><div></div></div> 86
Other coverage combinations	33,191 (4.4%)	<div><div></div><div></div></div> 75	19,579 (3.8%)	<div><div></div><div></div></div> 64
With direct purchase and medicare coverage	17,607 (2.4%)	<div><div></div><div></div></div> 86	10,672 (2.1%)	<div><div></div><div></div></div> 76
Employer based and medicare coverage	16,806 (2.3%)	<div><div></div><div></div></div> 100	10,770 (2.1%)	<div><div></div><div></div></div> 93
Employer based and direct purchase coverage	11,488 (1.5%)	<div><div></div><div></div></div> 105	8,065 (1.6%)	<div><div></div><div></div></div> 108
Medicare and medicaid/means-tested public coverage	8,687 (1.2%)	<div><div></div><div></div></div> 76	5,965 (1.2%)	<div><div></div><div></div></div> 76

Acquisition Target - Top Visited Medical Facilities

Rank	Name	Distance	Visitors
1	Building on the acquisition target's campus	0.1 mi	147.4K (55.4%)
2	CommonSpirit	5.1 mi	49.5K (18.6%)
3	UCHealth	20.5 mi	32.5K (12.2%)
4	Medical Center	9 mi	31.4K (11.8%)
5	Intermountain	16.9 mi	29.2K (11%)
6	Saint Joseph	16.6 mi	27K (10.1%)
7	St. Anthony Hospital	17.7 mi	25.3K (9.5%)
8	AdventHealth Location	3.6 mi	25.3K (9.5%)
9	AdventHealth Location	3.7 mi	25K (9.4%)
10	Saint Joseph Hospital	16.7 mi	24.5K (9.2%)

Force ranking opportunities to assess different assets

Name	Site Selection	Visits (12mo)	Ranking (Visits)	YoY Growth	Loyalty	Cannibalization	Trade Area Size	Demographic Similarity	Competition Density
Acquisition target 1	83%	1,300,000	1	7.5%	4.79	56%	764,000	88%	2
Acquisition target 2	80%	1,000,000	3	10.4%	4.91	7%	426,000	81%	3.2
Acquisition target 3	79%	627,600	8	-6.8%	4.52	57%	889,000	80%	2.3
Acquisition target 4	78%	535,500	9	4%	4.9	43%	427,000	76%	3.3
Acquisition target 5	71%	646,500	6	3.1%	4.71	37%	331,000	87%	3.7
Acquisition target 6	69%	698,100	5	10.6%	6.09	0%	107,000	58%	0
Acquisition target 7	67%	256,400	11	8.6%	4.03	4%	278,000	78%	5
Acquisition target 8	65%	1,100,000	2	3.8%	5.57	2%	273,000	75%	5.4
Acquisition target 9	65%	177,900	12	-1.8%	3.9	4%	264,000	79%	5.5
Acquisition target 10	60%	744,900	4	13.3%	5.43	4%	221,000	68%	6.1
Acquisition target 11	57%	627,600	7	2.6%	5.6	2%	193,000	65%	6.9
Acquisition target 12	52%	533,700	10	N/A	4.04	21%	140,000	83%	14.3

03

Success Stories



Marketing use cases and success stories

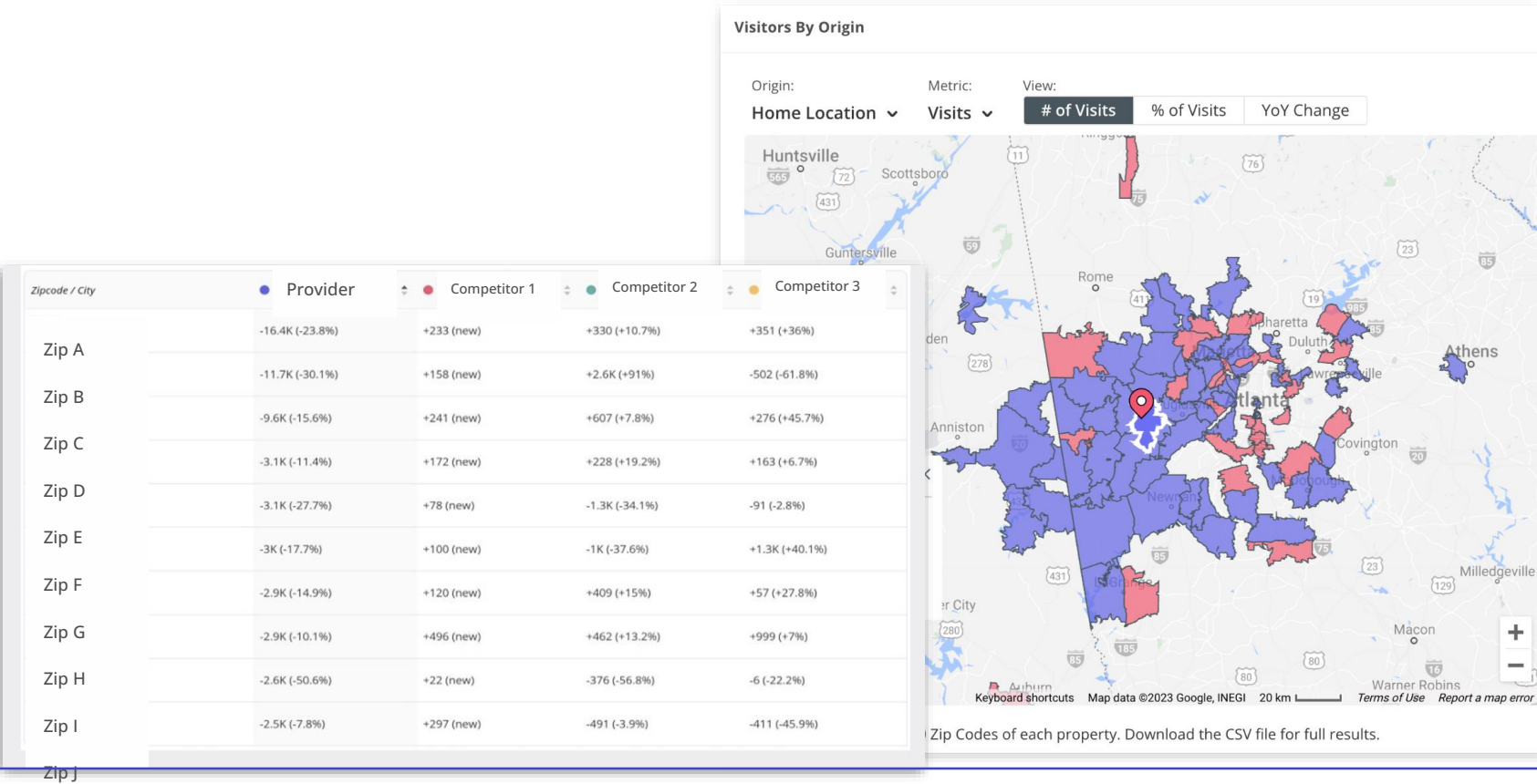
Gain competitive intel to better target patients

The Problem

A healthcare provider had a locations see a 10% decline in emergency visits YoY, & wanted to identify the causes and create a mitigation plan.

Placer's Solution

Using location data to breakdown zip code 'battleground' and smartly allocate marketing campaigns into focused areas, **resulting in 8% recovery**



Answer questions like...

Q: How are we doing compared to our competition, nearby locations, and the healthcare category?

Q: How are competitors performing? Which battlegrounds are we losing?

Q: What is the profile of our competitors' patients? Do ours differ?

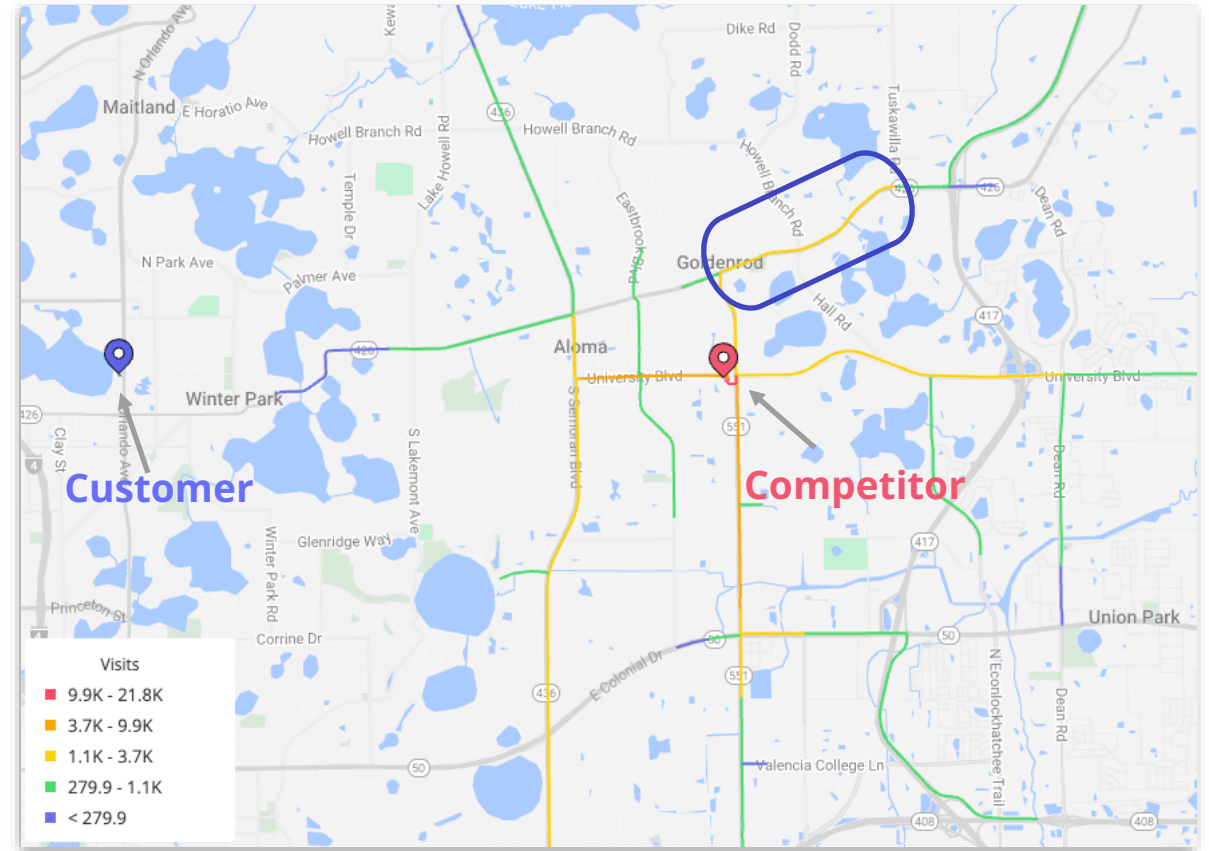
Expose your brand at the right routes

The Problem

A FSED provider had a competitor nearby that was outperforming their location. Without data to understand where their patients routes, it was challenging to create a marketing plan to target the competition.

Placer's Solution

Analyzing the path that competitor's customers would take, the provider was able to place OOH advertising highlighting the improved care that they offer relative to local competitors, increasing traffic & **bringing the location up to it's budgeted amount**



Answer questions like...

Q: What are the routes and commute time for patients?

Q: Where are competitor's patients coming from?

Q: What is the profile of our competitors' patients? Do ours differ?

Learn from competitors and optimize clinical hours

The Problem

An orthopedic provider had maxed out the number of patients that could be seen at one of their locations and evaluated a significant investment to add another location

Placer's Solution

Using Placer to see the visitor time of day provided an insight that patients were going to competitors after 5pm (when they are closed) so they expanded operating hours to accommodate demand **resulting in increased visitation and avoiding costly investment**



Answer questions like...

Q: How are competitors performing during their expanded hours?

Q: Are there alternatives to costly investment?

Q: How can we increase clinical capacity?

04

Innovation Corner



Roadmap & leveraging AI

Healthcare Roadmap

2H 2025 Development

MARKETING

- 1 **Campaign Impact**
Measure campaigns in minutes, not days
- 2 **Mobile Advertising Partner (Add-on)**
Access targeting & 1:1 attribution solutions
- 3 **OOH Attribution**
Incremental lift of your OOH campaign

REAL ESTATE

- 1 **Territory Mapping**
Create, visualize and analyze your territories
- 2 **Asking Rent Data Layer (MapStudio)**
Asking Rents by submarket
- 3 **Incubation**
 - Predictive Cannibalization
 - Lease Negotiation Report

STRATEGY

- 1 **Market Enhancements**
Residents tab; Biz Activity; Total visits, Visitor Journey
- 2 **Visit Forecast (Beta)**
Visit forecast for any location



2026 Roadmap

- 1 **Healthcare Claims Data**
Visualize and quantify insurance claims
- 2 **Market Planning / ADV whitespace**
Optimize # of stores nationally or by mkt
- 3 **Rent and Sales Comps by Submarket**
Understand local rents and sales comps
- 4 **Direct DSP Integration**
Push trade area info directly to your DSP
- 5 **Business Activity Report**
Retail composition & market share by mkt

AI First Company

Establish Placer as the leader in Generative AI for location intelligence



EXPLORE

"Find Urgent Care locations within 0.5 miles of a hospital"



ANALYZE

"Which zipcode attracts most visits to my ER in Chicago?"



LEARN

"How do I carry out a Site Selection analysis in Placer?"



PACKAGE

"Create a Competition Map for Banner Health in Downtown LA"



NOTIFY

"Where is my competitor opening new locations?"

AI First Company

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EXPLORE

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LEARN

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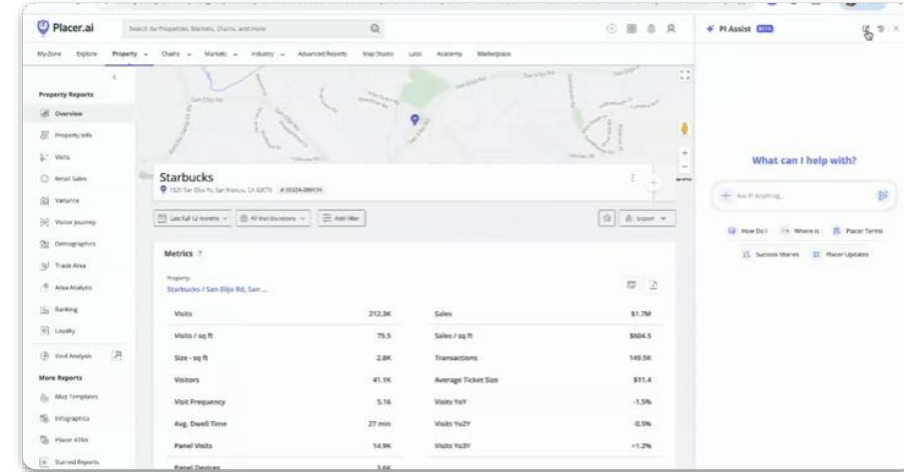
PACKAGE

"Create a Competition Map for Banner Health in Downtown LA"



NOTIFY

"Where is my competitor opening new locations?"





Q&A

Please be sure to complete the session evaluation on the mobile app!

