

2017 Southwest Healthcare Marketing Report:

Consumer Perceptions & Attitudes



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Our healthcare system is on life support.

The fate of the Affordable Care Act is uncertain. Insurance premiums continue to skyrocket. We're facing a critical nationwide shortage of physicians. And the U.S. life expectancy just dropped for the first time since 1993.

It's enough to make you sick.

Still, there are signs of life. Healthcare is about to become the largest employment sector in the U.S., leaving government, business and professional sectors in the dust. By 2024, nearly 22 million of us will be working in healthcare.¹

You can blame the aging of America for much of our healthcare woes and opportunity. Today, about 15% of us are 65 years or older, and that will rise to 21.7% by 2040.² More than 98 million of us will be enjoying our golden years by 2060, and we'll all need access to physicians, hospitals, clinics, pharmaceuticals and more.



If you have children,
steer them toward a
career in nursing, health
technology or therapy;
***nearly one in four
new jobs will be in
healthcare-related fields.***



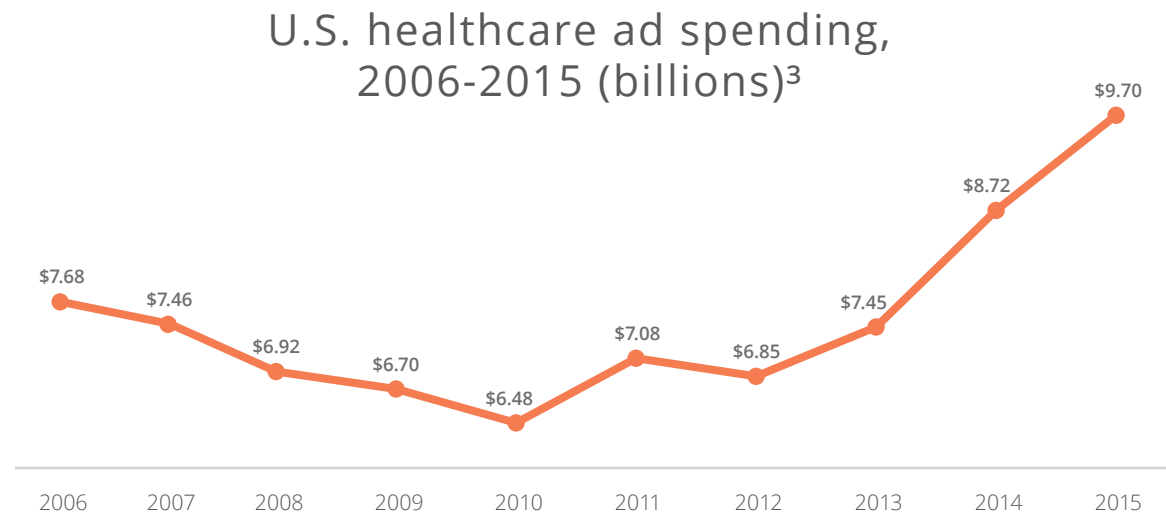
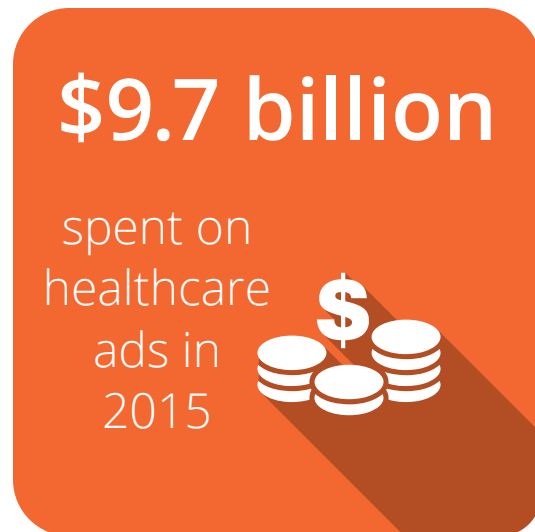
1. U.S. Bureau of Labor Statics, "Employment Projections: 2014-24 Summary," December 8, 2015

2. U.S. Department of Health and Human Services, "Profile of Older Americans: 2015," May 23, 2015

INTRODUCTION

Despite this tumult, healthcare advertising is booming. \$9.7 billion was spent on healthcare ads in 2015, the last year full statistics are available for the U.S.³

That's a double-digit percentage increase over the previous year. Healthcare facilities, practitioners and insurance carriers are aggressively competing for consumers' attention.



But what messaging strategy works best for healthcare?

We've attempted to answer that question in this study, which focuses on perceptions and attitudes about healthcare marketing in the Southwestern United States. We want to know how best to promote healthcare facilities, physicians and providers. It's important to understand how to influence consumers to take their wellness seriously. Our industry is motivated to craft memorable healthcare messages that will resonate in the community.

Why the Southwest? Well, we live here. But it's also a unique region dotted with densely populated metropolitan areas and vast expanses of untouched desert and forest.

Unfortunately, people living in the Southwest suffer from many health disorders higher than national averages, including lung disease, skin cancer, Alzheimer's, diabetes, liver disease, hypertension and Parkinson's.⁴

To help our neighbors achieve optimal health, and to better understand how to influence their decisions, we posed specific questions about healthcare advertising and marketing to people throughout the Southwest.

Here's what they told us.

APRIL 2017

Stephen Heitz
MANAGING DIRECTOR, INTERACTIVE

Anne Robertson
MANAGING DIRECTOR, PUBLIC RELATIONS

Tim Trull
MANAGING DIRECTOR, STRATEGY

OVERVIEW

Set your time machine to the 1800s and you'll find that healthcare was awash with quacks who advertised miracle cures and elixirs that promised to cure everything from arthritis to cancer. In an effort to separate educated and licensed physicians from these charlatans, the American Medical Association's [1847 Code of Medical Ethics](#) explicitly prohibited marketing, saying, "It is derogatory to the dignity of the profession, to resort to public advertisements or private cards or handbills, inviting the attention of individuals affected with particular diseases." The AMA said that advertising is "highly reprehensible in a regular physician."

This prohibition against healthcare advertising remained intact until 1975, when the Federal Trade Commission successfully argued that the healthcare industry "unreasonably restrained trade by banning advertising and solicitation" and that the "ethical principles of the medical profession have prevented doctors and medical organizations from disseminating information on the prices and services they offer, severely inhibiting competition among health care providers."

Supreme Court rulings in 1982 confirmed the change, making it clear that healthcare was a commercial marketplace like any other. Because it bought and sold goods, advertising was permitted and even encouraged.

The gloves were off.



STATES SURVEYED



Arizona



California



Colorado



Nevada



New Mexico



Utah

OVERVIEW

It wasn't long before hospitals, physicians and insurance companies kicked off fierce competition to fill beds and entice consumers with elective procedures. Today, despite an emphasis on wellness and outcomes, the healthcare industry continues to fund significant acquisition advertising and public relations campaigns.

And as consumers take greater responsibility for their personal health, marketing in all its forms—advertising, public relations, interactive and more—continues to play an important role in influencing decisions.

Despite the prevalence of healthcare advertising, opinions differ about the

best way to attract consumers. All CMOs have their preferred tactics. What messages will resonate most with consumers? Do people prefer a practice that touts its experience or one that emphasizes a high-touch philosophy? What mediums are preferred for viewing and observing important and often highly technical healthcare marketing messages?

To guide these marketing decisions, we surveyed a broad cross-section of consumers throughout Arizona, California, Colorado, Nevada, New Mexico and Utah. We were joined in this effort by WestGroup Research, the largest market research firm in the Southwest.

Our goal is simple:

— Put an end to guessing. —

This study makes that possible. The results are insightful and even surprising.

TOP PREFERRED MEDIA



85%
TELEVISION



70%
DIRECT MAIL

SELECTED HIGHLIGHTS

TELEVISION IS STILL KING

Despite the rise of online marketing, websites and social media, TV is far and away the preferred medium for receiving advertising and marketing messages concerning healthcare. More than 85% of all respondents named TV among their top five favorite media for healthcare messages.

DIRECT MAIL RESURGENCE

While television dominates, the second most preferred media is direct mail. Healthcare content is sufficiently complex that important matters can't be covered in a sound bite. More than 70% of those surveyed named direct mail in their top-tier media. Despite their decline, newspapers are also a media preferred by respondents.

SOCIAL MEDIA IS TOPS WITH MILLENNIALS

This isn't surprising. Those under 35 prefer social media as the best media for a healthcare company to advertise or market to them.

WINNING WITH WORDS

The three words that ranked highest as being most effective in healthcare marketing are *knowledgeable*, *trustworthy* and *cost-effective*. That may not sound like groundbreaking news, but consider this: Similar words such as *expert*, *helpful* and *innovative* ranked significantly lower. Our respondents see a clear difference between *knowledgeable* and *smart*. Clearly, nuance matters.

BEST VALUE-PROPOSITION MESSAGES

Regarding messaging, the surprising winner was *"We will treat the problem, not just the symptoms."* This holistic view of healthcare runs counter to the messages that much current advertising carries. Phrases such as *"We have the best treatment"* and *"We understand what you are going through"* did not resonate. And despite the wealth of evidence that testimonials matter, the least preferred statement was, *"Your friends recommend us."*

DIFFERENCES BETWEEN LIGHT & HEAVY HEALTHCARE USERS

Consumers who use healthcare services sparingly evaluate marketing messages differently than those who are medium or heavy users of hospitals, physicians and lab/imaging services. Light users ranked *"We will be there for you"* much higher than others. The healthier the consumer, the less receptive they'll be to messages that emphasize current needs, such as *"We are an expert in your particular health condition or disease."*

Clearly,
nuance
matters.



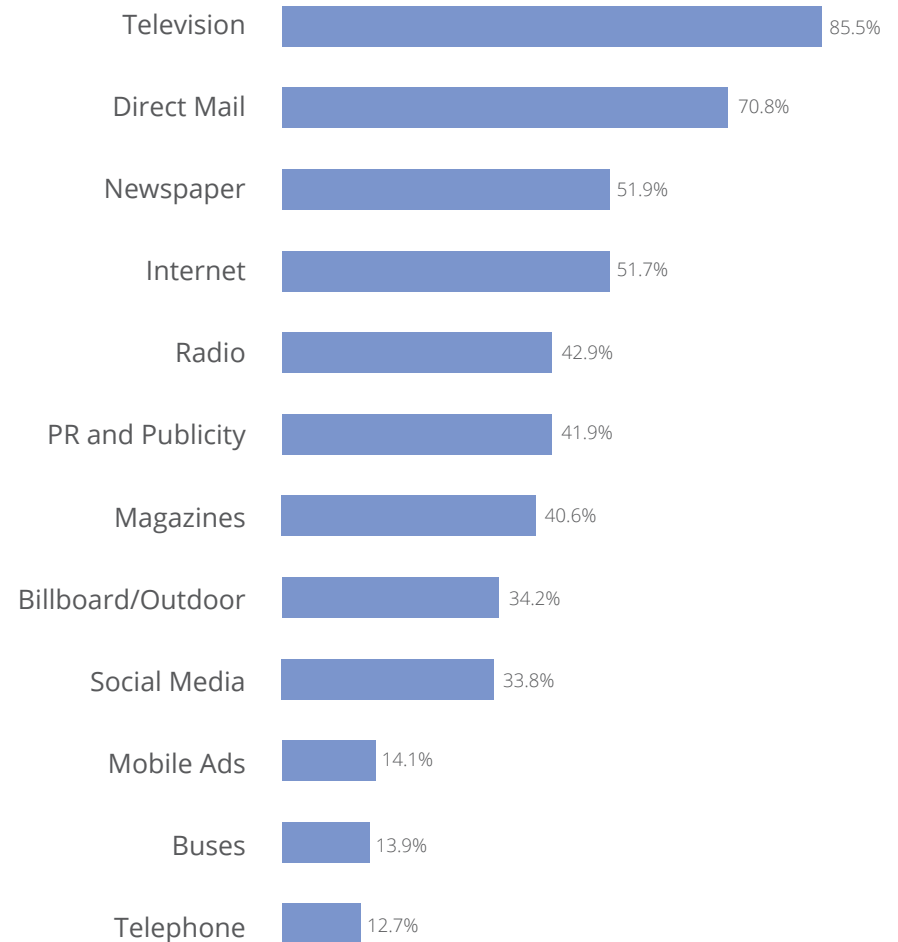
TV dominates and (*surprise*) direct mail surges

Nielsen has reported that TV viewership is declining. And TIME said that “the long-prognosticated death of TV may be happening before our eyes.” This might be true, but don’t tell that to our survey respondents. When it comes to their preferred media to receive healthcare information, TV is king.

Maybe we shouldn’t have been surprised, but the dominance of television caught us a little off guard. 85.5% of those surveyed ranked TV highest for healthcare marketing. And it wasn’t even close. At 70.8%, direct mail was a distant second. That’s remarkable, too, but more on that later.

Most effective media for healthcare marketing

Percent of all respondents who ranked each media in their top five of being the best way for a healthcare company to advertise or market to them.



WHAT WE FOUND

TO BE SURE, TV IS A MONSTER

According to a 2016 Nielsen study, the average consumer spends 32 hours a week watching TV. The older you are, the more TV you watch: 18 to 24-year-olds watch 14 hours of TV a week, while those 65 and older consume more than 48 hours of TV each week.

It's well accepted that the older we get, the more likely we are to access the healthcare system. Our bodies age. Arteries get clogged. Knees and hips need replacing. This is why health insurance costs more as you get older.

But favoring TV over other media for healthcare information is quite another thing. With few exceptions, this preference transcended age, gender and education. Men and women ranked TV highest, as did all education levels. Respondents with a high school education or less topped the charts, with 94.9% of them ranking TV highest.

One of our respondents put it bluntly: "Everybody watches TV and I believe it's the best way to get a message across."

"This is the easiest way to reach me because TV is the one I use the most and pay attention to."



The average consumer spends 32 hours a week watching TV



The **older** you are, the **more** TV you watch.

WHAT WE FOUND

“I look at each piece of mail I receive, and read the ones I’m interested in learning more about. I rarely pay attention to internet ads and I won’t talk to telemarketers.”

We expected the internet to perform strongly, which it did at 51.7%. But it was beat by direct mail (70.8%), an old but apparently still effective marketing channel.

The [Data & Marketing Association](#) reports that direct mail volumes have declined 1.9% year-over-year since 2005. However, the nature of healthcare marketing lends itself well to media where long-form content can explain complex matters. To understand a health insurance plan, it is often necessary to review lengthy documents, charts and fine print. With mailbox clutter decreasing, marketers should consider listening to our respondents and contemplate media strategies that incorporate direct mail.

At 51.9%, newspapers just nipped the internet (51.7%) in the survey, which was also unexpected. But no matter what you’ve heard, newspapers aren’t dead. While print editions have suffered over the years, newspaper publishers now distribute content on multiple platforms. According to a recent [Nielsen Scarborough](#) study, “More than 169 million adults in the U.S. read a newspaper in a month—whether it be in print, on a website or via mobile app. In total, newspapers reach 69% of the U.S population in a given month.”

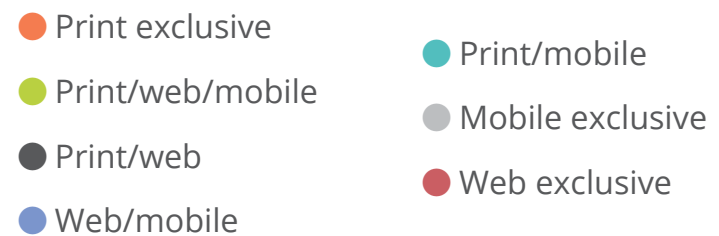
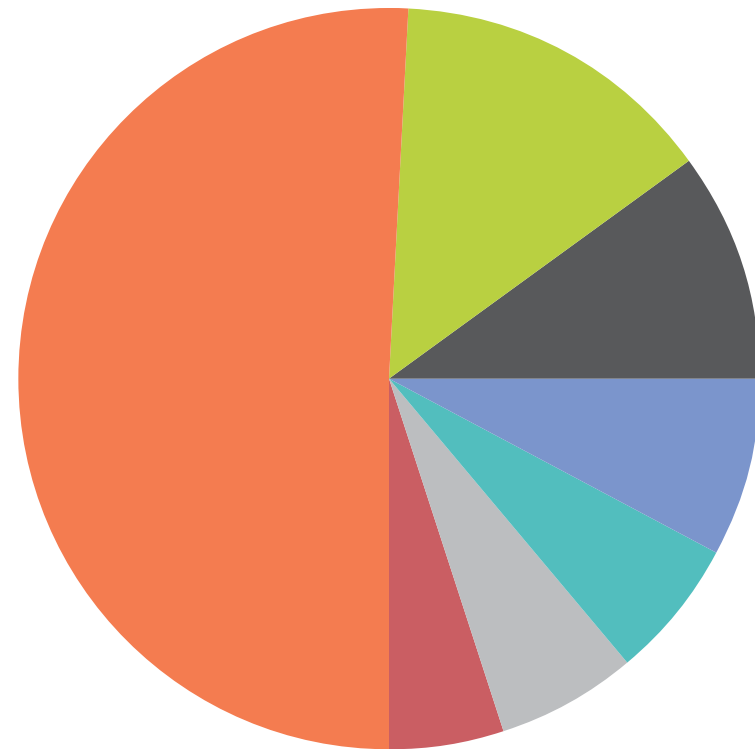
WHAT WE FOUND

According to Nielsen Scarborough data, here's how newspaper readership by platform shakes out:

Print exclusive	51%
Print/web/mobile	14%
Print/web	10%
Web/mobile	8%
Print/mobile	6%
Mobile exclusive	6%
Web exclusive	5%

Although we didn't specifically ask our respondents which newspaper platform they preferred, we suspect they were referring to a print edition. In any case, our respondents believe newspapers are a great resource for consuming information about healthcare.

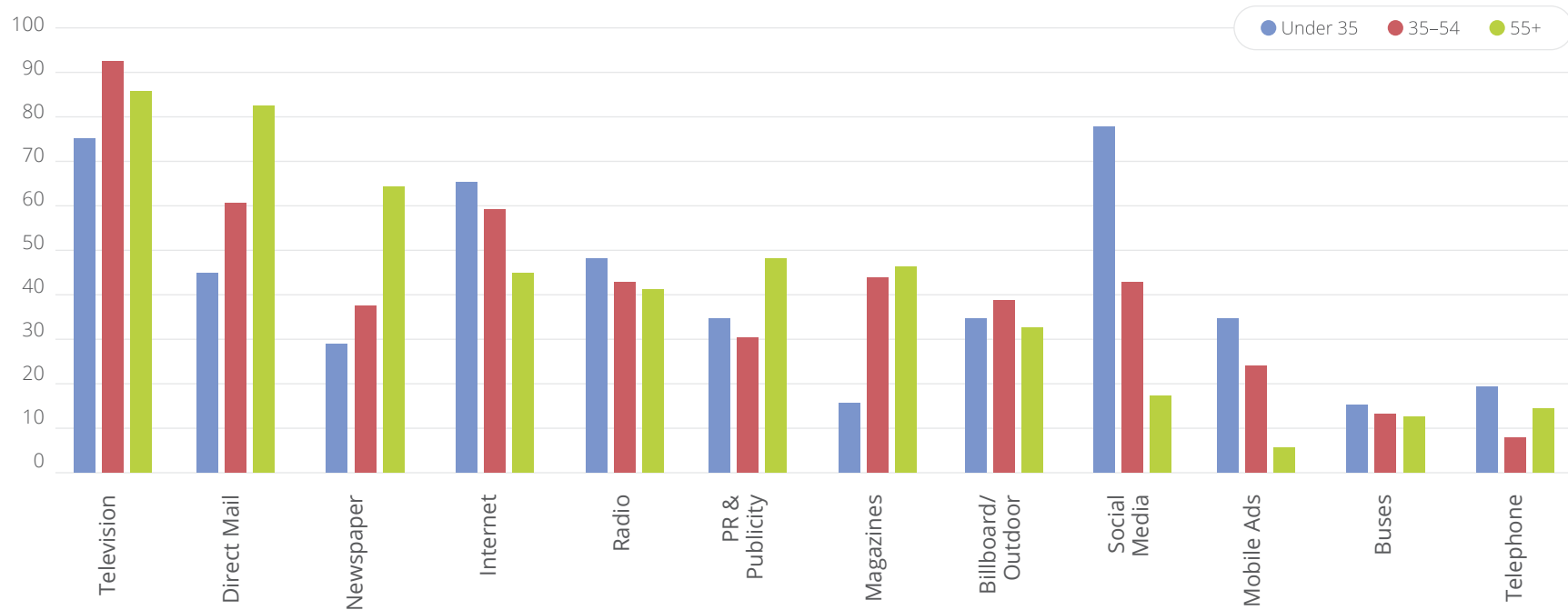
Newspaper readership by platform



Social media flexes its muscles

Preferred media for healthcare marketing, by age

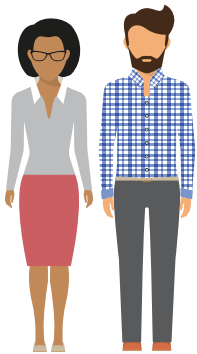
Percent of all respondents by age who ranked each media in their top 5 of being the best way for a healthcare company to advertise or market to them.



WHAT WE FOUND

When it comes to preferred media, nearly everyone ranked TV highest. The respondent outliers are those under the age of 35. While 74.7% of this young group still ranked TV very high, it was topped by—wait for it—social media, at 77.2%. This data aligns with other research that indicates a strong correlation between age and accessing social media platforms.

A 2016 study by the [Pew Research Center](#) reports that people 18–29 top usage of Facebook, Instagram, Pinterest, LinkedIn and Twitter. Those in the 30–40 bracket are the second largest users of all five platforms. Similarly, the younger you are, the more likely you are to desire healthcare marketing via internet web ads, with those under 35 ranking it third (65.8%).



The younger you are, the more likely you are to desire healthcare marketing via internet web ads.

Older respondents don't believe social media is the best for them to consume messages about healthcare advertising and marketing.



"I'm on social media several times a day. If I find a useful or meaningful site for health insurance information, I'll add it as a friend on Facebook or Twitter so I can get all the updates they publish. At that point, I can read the ones that interest me and skip the ones that don't."

WHAT WE FOUND

Conversely, older respondents don't believe social media is the best for them to consume messages about healthcare advertising and marketing. This makes sense, because so few of them are active on social platforms. Pew's study indicates that while 35% of those age 65 and older are engaged on Facebook, other platforms are mostly ignored with only LinkedIn breaking double digits at 11%.

We suspected that older respondents would favor traditional media, and this proved true. People 55 and over demonstrate strong preferences for television, direct mail and newspapers.

It might be an unfair stereotype that younger people aren't big readers, but our study underscores that assertion. Those under 35 ranked magazines and newspapers lower than those who are older.

Finally, let's take note that all ages are shunning bus advertising and telemarketing. Ads on mobile devices also turned in a poor showing. These media channels might prove excellent for some industries, but not for disseminating healthcare messages.

Healthcare marketers—well, all marketers—have long known that the key to effective advertising is to be specific:

specific audiences → specific messages → specific channels

The often technical and hard-to-understand nature of healthcare makes this even more true. And it confirms the old "give the people what they want" platitude. Communicate to people where they are and how they want it.

All ages are shunning
bus advertising &
telemarketing.

Ads on mobile devices
also turned in a
poor showing.

*These media channels
might prove excellent
for some industries,
but not for
disseminating
healthcare messages.*



When knowledgeable isn't smart

This report attempts to discover what kind of marketing messages will best influence consumers to buy—to visit a hospital, see a physician and/or purchase health insurance.

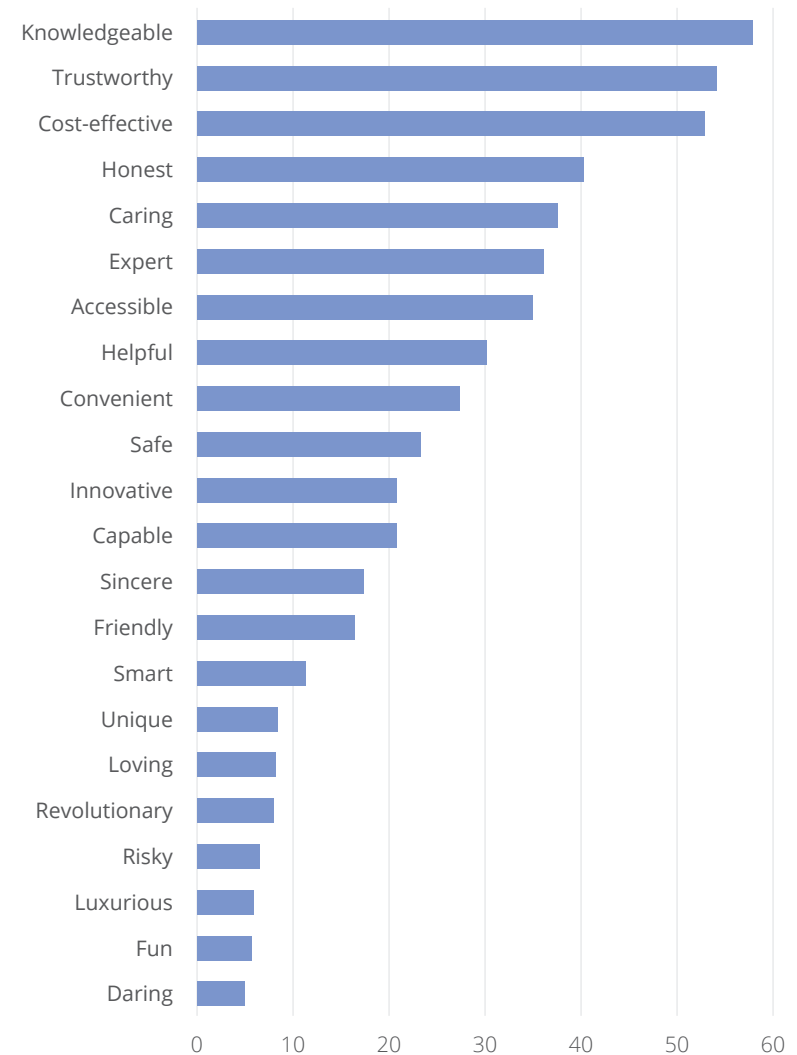
This is the holy grail of marketing.

What messages will move an audience to action?

The winning words aren't necessarily the news here. Wouldn't we all want to select a healthcare provider that is **knowledgeable**, **trustworthy** and **cost-effective**? The remarkable insight on benefit messaging is how clearly respondents are delineating slight shades between similar words. Is there a significant difference between **sincere** and **honest**?

Preferred words about healthcare

Percent of all respondents who ranked each word in their top 5 of being the most effective in communicating a healthcare provider's benefits.



WHAT WE FOUND

Leave it to consumers to surprise you. At first glance, *knowledgeable* (58.4%) and *smart* (9.3%) don't seem poles apart. They're almost interchangeable. But our respondents don't think so. Smart is associated with being intelligent, shrewd and clever. But someone who is knowledgeable exhibits a grasp of facts and truths, and displays a deep and specialized familiarity with a particular subject. When it comes to healthcare, you certainly want someone who is smart, but you'd also want to rely on people who have a significant understanding of their field, such as medicine or health plans.

One of our respondents who chose *knowledgeable* as a favorite word said, "I want my healthcare provider to be an expert in their field. I want the people who work for them to be smart and knowledgeable regarding the products/coverage provided." Another said, "You want your doctor to prescribe the best medicine or procedure needed to address your health problem. Mistakes can be very costly."

The data speaks in a fairly definitive way. The first tier (*knowledgeable*, *trustworthy* and *cost-effective*) towers well above those behind it, and for good reason. These are nuanced words that have slightly different meanings than those we have traditionally seen in healthcare marketing. We suspect that words such as *expert*, *caring* and *innovative* have been overused and may have lost their power. The upgraded gradations of the three words atop the survey have struck a chord. This may be because they have been underused in healthcare advertising. Together, they create a potent branding proposition.

We didn't expect that people would choose a daring, fun or risky health provider, but you don't know for certain unless you ask. Healthcare is a conservative industry, and it is risk averse. Consumers are the same way. Few people want their doctor to take chances. We need health insurance, even if it's "just in case."

58%

while
only

PREFERRED
KNOWLEDGEABLE

9%

PREFERRED
SMART

55%

while
only

PREFERRED
TRUSTWORTHY

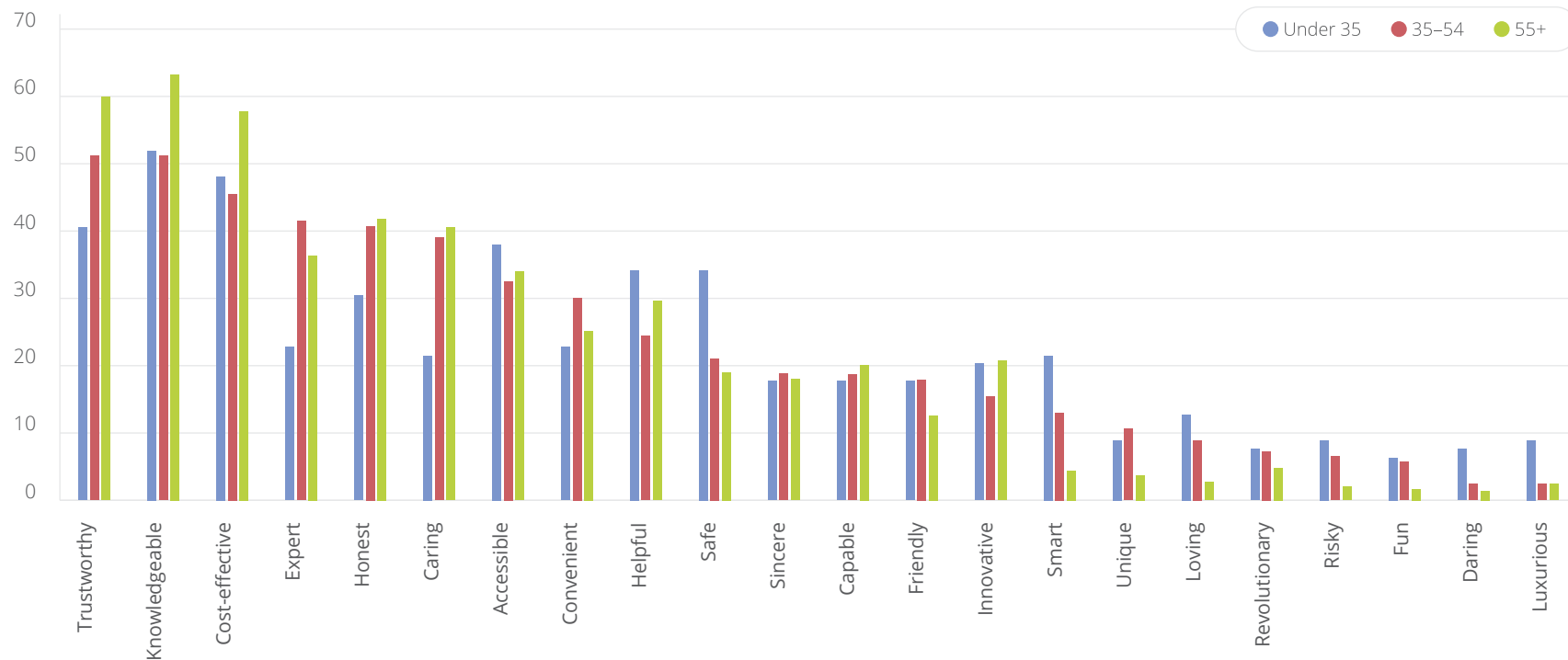
16%

PREFERRED
SINCERE

Millennials, the most risk averse generation

Preferred words about healthcare, by age

Percent of all respondents by age who ranked each word in their top 5 of being the most effective in communicating a healthcare provider's benefits.



*Top ranked words
across generations:*

knowledgeable

trustworthy

cost-effective



*Millennials show a
unique affection for*

safe

helpful

accessible



WHAT WE FOUND

All ages ranked *knowledgeable*, *trustworthy* and *cost-effective* at the top. This consensus across generations offers the kind of remarkable consistency marketers desire. Target audiences often present muddled data that leads to false assumptions and failed campaigns. Despite the harmony in our data, it is interesting to note that consumers 55 and older value these attributes more strongly than younger audiences.

While people under 35 are in agreement about the top benefit words, they show a unique affection for *safe*, *helpful* and *accessible*. These are millennials, so it's understandable that they desire healthcare providers who can help them make sense of often challenging and confusing decisions. Marketers desiring to target younger consumers would be smart to prioritize exceptional customer service characterized by helpfulness and making complicated matters appear clear and relatable.

Similarly, people with a high school graduation or less also ranked *helpful* very high. And as education rises, *helpful* becomes less attractive. This is a strong signal that less-educated consumers are having trouble navigating our healthcare system. Communicators targeting this market should ensure their marketing messages are easy to understand and should ramp up customer service.

WHAT WE FOUND

It's instructional to see that those under 35 also rank *safe* significantly higher than older respondents. We wouldn't have predicted that young people would be worried about how healthcare safety might affect their mortality, but 34.2% of them ranked *safe* as one of their top five preferred words. To understand their motivation and concerns, it's instructional to listen to them.

In hindsight, we shouldn't have been surprised that millennial respondents have expressed a concern about safety. According to [Investopedia](#)'s Dan Moskowitz, "Millennials aren't just risk averse, they are the most risk averse generation since The Great Depression." A 2014 study by [The Brookings Institution](#) cites millennials for their historically low stock market investments. And a 2014 report by [UBS Investor Watch](#) says, "Millennials hold more than half of their assets in cash (52%) with less than one-third of their assets (28%) in equities. This is directly counter to traditional long-term investment allocation advice." Other age groups have only 23% of their savings in cash.

With millennials proving themselves so risk-averse in financial matters, it's understandable their conservative nature would extend to healthcare. No wonder they are anxious about safety.

"When talking about healthcare, I would be willing to drive far and pay a lot as long as I know my safety is the most important consideration by the healthcare facility."

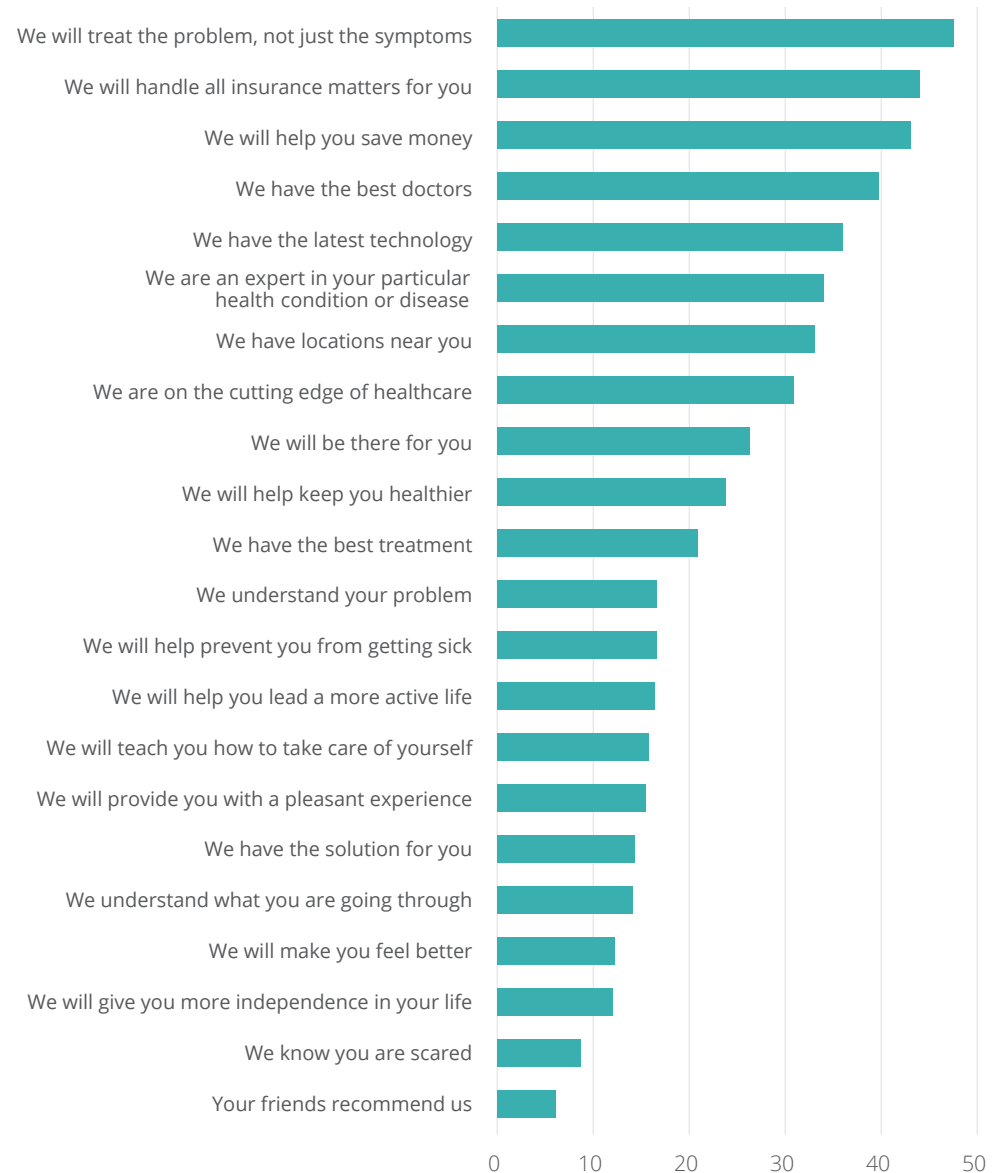
"Most medical things or procedures have some possible undesirable effects. Expecting a treatment to be safe makes me more likely to try it."

"Most people, above all else, want reassurance that they will be safe in a healthcare environment."

Reason shines, but friends fall short

Preferred statements about healthcare

Percent of all respondents who ranked each statement in their top 5 of being the most effective in communicating a healthcare provider's benefits.



WHAT WE FOUND

Unlike data relating to media and word messaging, respondents do not speak as loudly when it comes to selecting preferred marketing statements about healthcare.

No single statement broke the 50% mark.

Great market research can be about confirming suspicions. It's always satisfying to know that a target market will respond favorably to branding messages. But it's just as gratifying when respondents provide surprise, which is the case with this question. We did not predict that the top answer (at 47.7%) would be "We will treat the problem, not just the symptoms." That is a profoundly intellectual statement that operates on many levels. It acknowledges an understanding about cause and effect, and suggests that while it would nice to make an ache go away, it's important to discover its reason. This sophisticated phrase is telling; consumers understand the concept of wellness and are willing to participate in a deep-dive into their health.

A respondent reported being "More interested in getting to the root cause of the problem as a treatment for symptoms." Similarly, another said, "I can't stand it when there is a way to cure a condition and the doctor masks the symptoms instead of mixing the relief with the cure."

CONSUMERS WITH A HIGH SCHOOL
EDUCATION OR LESS RANKED

"We will help save you money"

AS THEIR MOST PREFERRED
BRANDING STATEMENT

57.6%



PEOPLE AGE 55 & OLDER RATED
"We'll treat the problem,
not just the symptoms"
HIGHER THAN ANY OTHER GROUP

THEY ALSO PREFERRED
"We have the best doctors" &
"We have the latest technology"
MARKEDLY MORE, AS WELL

51.7%



OPPORTUNITY FOR MARKET DISRUPTION

alleviate the insurance headache



The next most favored statement is more predictable, but it points the way toward a competitive advantage for healthcare-related companies that master it.

An entity promising to “handle all insurance matters for you” will be welcomed in the market if the company delivers on that promise. This is a pain point for consumers—whether they don’t know how to handle health insurance or they find it troublesome. Either way, institutions that can alleviate this headache will likely find consumers lining up. The data shines a light on an opportunity for market disruption.

The least liked answers to this question are also worth noting. Consumers don’t seem to care about an

institution understanding what they are going through. Nor do they want to be taught how to take better care of themselves or lead a more active life. People may desire those things, but they are saying they will not respond to marketing messages with those sentiments.

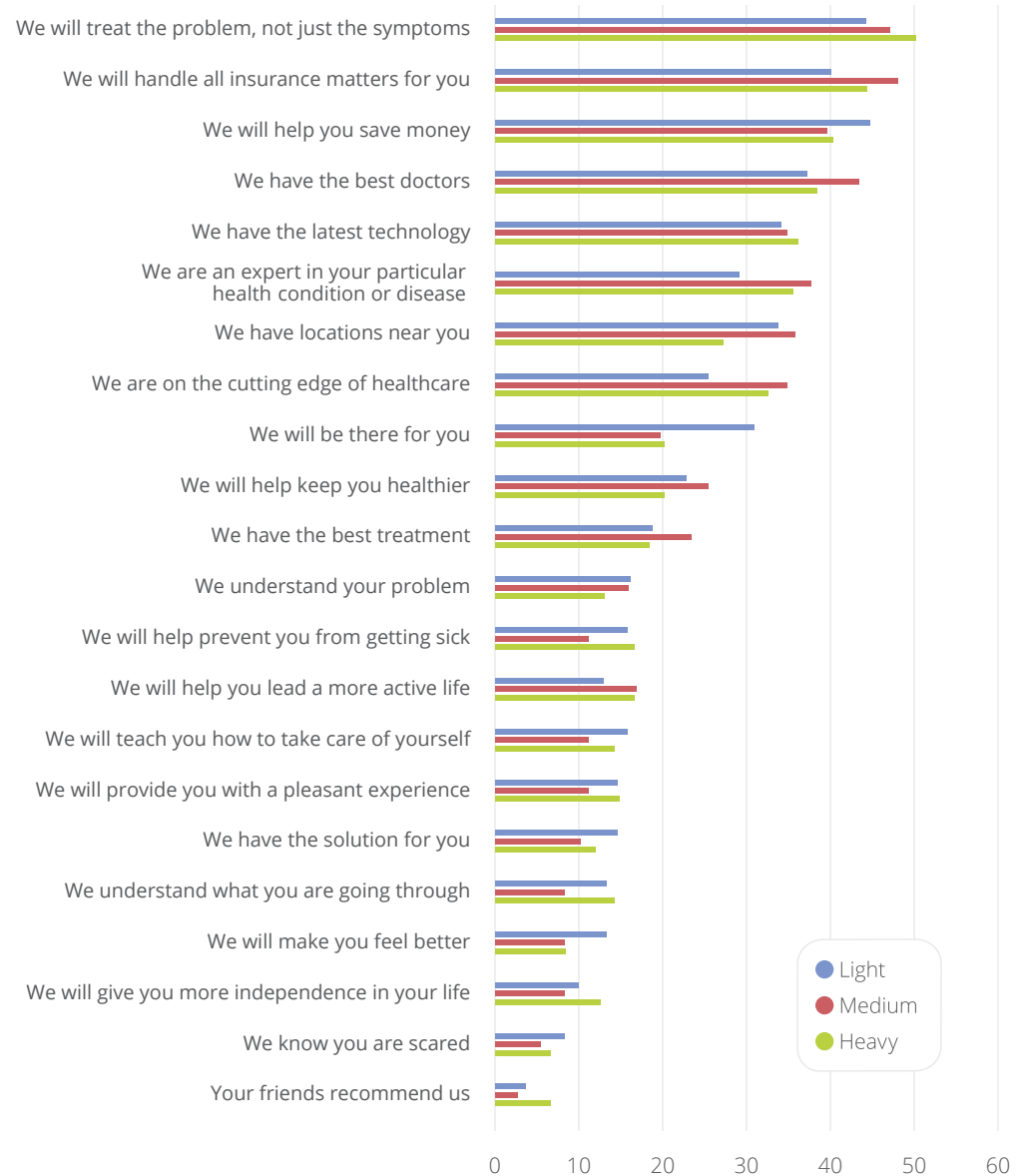
Perhaps most surprising is the least preferred statement: “Your friends recommend us.” This is contrary to other studies. A 2009 report by [Razorfish](#) concluded that close family friends are the biggest influencer of purchasing behavior. We have been told that when people have difficulty choosing a doctor or a health plan, they ask friends for advice. But that’s not the case here.

WHAT WE FOUND

Healthy
people
seek savings
(and support)

Preferred statements about healthcare, by usage

Percent of all respondents by usage of healthcare in the past year who ranked each statement in their top 5 of being the most effective in communicating a healthcare providers benefits.



Would a
healthy person
prefer different
marketing messages
than someone
who is **sick**?



WHAT WE FOUND

We were curious if a person's health status would affect how they might view branding statements. Would a healthy person prefer different marketing messages than someone who is sick?

To determine this, we asked respondents how often they accessed specific healthcare services in the past year. We inquired about the number of times they performed each of the following in the previous 12 months:

- Visited emergency room
- Visited urgent care center
- Visited primary care doctor
- Visited specialist
- Overnight stay in a hospital
- Had surgery or similar procedure
- Had X-rays or other types of imaging performed
- Had blood, urine or other lab tests performed

For purposes of this study, we identified light usage as 5 or fewer visits over the past year; medium, 6–9 visits; and heavy, 10+ visits. The data provides useful insights for segmenting consumers based upon how often they interface with healthcare services.

WHAT WE FOUND

All three groups (light, medium and heavy healthcare users) had a different top preference for their favored health statement. Light users chose “We will help save you money.” Medium users selected “We will handle all insurance matters for you.” The heaviest users preferred “We will treat the problem, not just the symptoms.” Although each group chose a different favorite, all three statements were ranked highly by the three groups, and the variances are within the margin of error of +/- 4.4%.

Despite the closeness of the numbers, a more detailed look at the data reveals noteworthy trends that can assist health insurance companies with marketing to consumers who access healthcare sparingly and, conversely, might help hospitals and physicians recruit patients who have shown a high propensity of interfacing with healthcare practitioners.

This gets at an important question for healthcare companies: Do you want customers who have shown a history of frequent access to healthcare services, or do you desire healthier customers who do so sparingly?

Favored health statements

LIGHT HEALTHCARE USERS

“We will help save you money.”

MEDIUM HEALTHCARE USERS

“We will handle all insurance matters for you.”

HEAVY HEALTHCARE USERS

“We will treat the problem, not just the symptoms”



WHAT WE FOUND

The chart on page 25 shows that heavy healthcare users prefer the least common statements much more than light or medium users. Compared to light and medium healthcare users, heavy users show marked preferences for *“Your friends recommend us,” “We will give you more independence in your life”* and *“We understand what you are going through.”*

Perhaps the most interesting data point here is how high the light healthcare users ranked *“We will be there for you.”* Light users ranked this more than 11 percentage points higher than medium or heavy users. We believe this is because the statement *“We will be there for you”* speaks uniquely about the future. It doesn’t say that we

“are” there for you. It looks forward: we “will be” there for you. This is a reassuring message for people who are mostly healthy as demonstrated by their history of rarely touching the healthcare system.

This may be related to the same group (light users) ranking two other statements much lower than medium or heavy users: *“We are an expert in your particular health condition or disease”* and *“We are on the cutting edge of healthcare.”* It seems clear that the healthier you are, the less receptive you will be to messages that emphasize current needs.

The *healthier* you are, the *less receptive* you will be to messages that emphasize current needs.





APPENDIX

Methodology

The objective of this research was to gather quantitative feedback from a random sample of adult consumers (18+) living in Arizona and other major markets in the Southwestern U.S. A total of 497 online surveys were completed, with the following breakdown of completes by market: Arizona, 216; Denver, 66; Salt Lake City, 57; San Diego, 56; Las Vegas, 55; Albuquerque, 44.

Individual participants were provided by a major online survey panel, with the actual survey hosted by WestGroup Research in Phoenix, Arizona. The statistical margin of error for the overall sample is +/- 4.4% at the 95% confidence level, the standard error margin threshold for most public opinion research. Average survey length was approximately 9 minutes to complete.

Error margins for sub-segments of the sample (e.g., different age groups) vary depending on the size of that sub-segment. Statistically significant findings are noted within the report where applicable.

Research was conducted by WestGroup Research on behalf of LAVIDGE during Q1 2017.

Respondent profiles

GENDER

Male	52%
Female	48%

AGE

Under 35	16%
35-54	25%
55+	59%

EDUCATION

High school or less	12%
Some college or trade school	38%
College +	50%

INCOME

Under \$35,000	27%
\$35,000 to \$49,999	16%
\$50,000 to \$74,999	19%
\$75,000+	33%
No response	5%

Data

Preferred words about healthcare	
Daring	2.6
Fun	3.4
Luxurious	3.6
Risky	4.2
Revolutionary	5.8
Loving	6.0
Unique	6.2
Smart	9.3
Friendly	14.7
Sincere	15.7
Innovative	19.3
Capable	19.3
Safe	21.9
Convenient	26.2
Helpful	29.2
Accessible	34.2
Expert	35.4
Caring	37.0
Honest	39.8
Cost-effective	53.1
Trustworthy	54.5
Knowledgeable	58.4

Preferred words about healthcare, by age			
	UNDER 35	35-54	55+
Daring	7.6	2.4	1.4
Fun	6.3	5.7	1.7
Luxurious	8.9	2.4	2.4
Risky	8.9	6.5	2.0
Revolutionary	7.6	7.3	4.8
Loving	12.7	8.9	2.7
Unique	8.9	10.6	3.7
Smart	21.5	13.0	4.4
Friendly	17.7	17.9	12.6
Sincere	17.7	18.8	18.0
Innovative	20.3	15.4	20.7
Capable	17.7	18.7	20.1
Safe	34.2	21.1	19.0
Convenient	22.8	30.1	25.2
Helpful	34.2	24.4	29.6
Accessible	38.0	32.5	34.0
Expert	22.8	41.5	36.4
Caring	21.5	39.0	40.5
Honest	30.4	40.7	41.8
Cost-effective	48.1	45.5	57.8
Trustworthy	40.5	51.2	59.9
Knowledgeable	51.9	51.2	63.3

Most effective media for healthcare marketing

Telemarketing	6
Telephone	12.7
Buses	13.9
Mobile ads	14.1
Social media	33.8
Billboard/outdoor	34.2
Magazines	40.6
PR and publicity	41.9
Radio	42.9
Internet (web ads)	51.7
Newspaper	51.9
Direct mail	70.8
Television	85.5

Most effective media for healthcare marketing, by age

	UNDER 35	35-54	55+
Telemarketing	8.9	6.5	4.8
Telephone	19.0	8.1	12.9
Buses	15.2	13.8	13.3
Mobile ads	34.2	24.4	4.4
Social media	77.2	43.1	18.4
Billboard/outdoor	34.2	39.0	32.3
Magazines	15.2	43.1	46.3
PR and publicity	34.2	30.1	48.6
Radio	48.1	43.9	41.2
Internet (web ads)	65.8	59.3	44.9
Newspaper	29.1	38.2	63.9
Direct mail	44.3	60.2	82.3
Television	74.7	90.2	86.7

Data

Preferred statements about healthcare	
We will treat the problem, not just the symptoms	47.70
We will handle all insurance matters for you	43.90
We will help you save money	42.90
We have the best doctors	39.40
We have the latest technology	35.40
We are an expert in your particular health condition or disease	33.40
We have locations near you	32.40
We are on the cutting edge of healthcare	30.00
We will be there for you	25.20
We will help keep you healthier	22.50
We have the best treatment	19.50
We understand your problem	14.90
We will help prevent you from getting sick	14.90
We will help you lead a more active life	14.70
We will teach you how to take care of yourself	14.10
We will provide you with a pleasant experience	13.70
We have the solution for you	12.50
We understand what you are going through	12.30
We will make you feel better	10.30
We will give you more independence in your life	10.10
We know you are scared	6.60
Your friends recommend us	3.80

Preferred statements about healthcare, by healthcare usage			
We will treat the problem, not just the symptoms	45.0	48.0	51.2
We will handle all insurance matters for you	40.7	49.0	45.1
We will help you save money	45.5	40.2	40.9
We have the best doctors	37.7	44.1	39.0
We have the latest technology	34.6	35.3	36.6
We are an expert in your particular health condition or disease	29.4	38.2	36.0
We have locations near you	34.2	36.3	27.4
We are on the cutting edge of healthcare	25.5	35.3	32.9
We will be there for you	31.2	19.6	20.1
We will help keep you healthier	22.9	25.5	20.1
We have the best treatment	18.6	23.5	18.3
We understand your problem	16.0	15.7	12.8
We will help prevent you from getting sick	15.6	10.8	16.5
We will help you lead a more active life	12.6	16.7	16.5
We will teach you how to take care of yourself	15.6	10.8	14.0
We will provide you with a pleasant experience	14.3	10.8	14.6
We have the solution for you	14.3	9.8	11.6
We understand what you are going through	13.0	7.8	14.0
We will make you feel better	13.0	7.8	7.9
We will give you more independence in your life	9.5	7.8	12.2
We know you are scared	7.8	4.9	6.1
Your friends recommend us	3.0	2.0	6.1

Questionnaire

This brief survey will ask for your opinions on various issues about healthcare advertising, marketing and related topics. For the purposes of the survey, this will mean any advertising, websites, messages or other information you have received from various healthcare providers (hospitals, clinics, insurance companies, labs, or other providers).

To complete the survey, simply click on the appropriate answer or provide the requested information where appropriate. For open-ended questions, please provide complete phrases or thoughts, and as much detail as needed to express your opinion. Thanks in advance for your input!

1. Listed below are various ways that a healthcare company might advertise or market to you. Please indicate which of these you feel would be most effective in advertising or marketing to you by clicking and dragging into the boxes provided.

- | | |
|--------------------------------|-----------------|
| • Mobile ads | • Telemarketing |
| • Magazines | • Social media |
| • Internet (web ads) | • Television |
| • Newspaper | • Telephone |
| • Billboard/outdoor | • Radio |
| • Ads on outside of buses | • Direct Mail |
| • Public relations & publicity | |

2. Listed below are the Top 5 methods you selected. Please indicate your preferences by dragging your favorite to the top spot, your next favorite below it, and so on until all 5 are in the order of your preference.

3. Why do you feel [top answer] would be most effective in communicating with you? Please be as specific as possible.

4. Listed below are several words that might be used to describe providers of healthcare services. Once again, please choose which words you feel would be most effective and least effective in communicating the provider's benefits.

- | | |
|------------------|-----------------|
| • Revolutionary | • Knowledgeable |
| • Safe | • Expert |
| • Caring | • Trustworthy |
| • Convenient | • Daring |
| • Luxurious | • Accessible |
| • Helpful | • Unique |
| • Innovative | • Risky |
| • Cost-effective | • Capable |
| • Sincere | • Smart |
| • Friendly | • Fun |
| • Honest | • Loving |

5. Shown below are your 'Top 5' words; please place them in the order of your preference by dragging your favorite to the top of the list, your second-favorite below it, and so on.

6. Why did you choose [top answer] as your favorite word? What is it that makes it so effective?

7. Next we'd like to get your opinions on actual phrases or statements that providers might use in their advertising and marketing. Once again, please choose which statements you feel would be most effective and least effective in communicating the provider's benefits.

- We have the best doctors
- We are an expert in your particular health condition or disease
- We understand what you are going through
- We will help keep you healthier
- We will give you more independence in your life
- We have the latest technology
- We will treat the problem, not just the symptoms
- We know you are scared
- We understand your problem
- We will help you save money
- We have the best treatment
- We will help prevent you from getting sick
- Your friends recommend us
- We are on the cutting edge of healthcare
- We will help you lead a more active life
- We will provide you with a pleasant experience
- We will teach you how to take care of yourself
- We will handle all insurance matters for you
- We have locations near you
- We will make you feel better
- We will be there for you
- We have the solution for you

8. Shown below are your 'Top 5' statements; please place them in the order of your preference by dragging your favorite to the top of the list, your second-favorite below it, and so on.

9. Why did you choose [top answer] as your favorite statement? What is it that makes it so effective?

10. During the past 12 months, do you recall seeing advertisements or promotions for any of the following healthcare organizations?
(CHECK ALL THAT APPLY)

- Primary care physician (family doctor) or practice
- Plastic or cosmetic physician or practice
- Bariatric (weight loss) physician or practice
- Behavioral (mental or psychiatric) physician or practice
- Eye/vision/Lasik physician or practice
- Dentist or dental practice
- Pharmaceuticals (any drug or medication)
- Hospital
- Walk-in clinic

11. During the past year, about how many times have you received each of the following types of healthcare services?

- Visited emergency room
- Visited urgent care center
- Visited primary care doctor
- Visited specialist
- Overnight stay in a hospital
- Had surgery or similar procedure
- Had X-rays or other types of imaging performed
- Had blood, urine or other lab tests performed

12. How would you describe your current health?

- Excellent
- Good
- Fair
- Poor
- Very poor
- Prefer not to answer

13. Which of the following best describes your current health insurance situation?

- Not currently insured
- Insurance provided through employer or spouse's employer
- Insurance purchased through the marketplace (AKA Healthcare.gov or Obamacare)
- Insurance purchased directly from a broker or insurance company
- Medicare
- Medicaid (insurance provided by the State)

THE FOLLOWING QUESTIONS ARE FOR STATISTICAL PURPOSES ONLY.

14. Please indicate your gender:

- Male
- Female

15. What is the zip code where you live?

16. Which of the following includes your age?

- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or older
- Prefer not to answer

17. Including yourself, how many adults 18 or older live in your household?

18. How many children under the age of 18 live in your household?

19. Which of the following includes the highest level of education you have completed?

- Some high school (did not graduate)
- High school graduate or GED
- Some college or trade school
- College graduate (Bachelor's degree)
- Post-graduate (Master's degree or higher)
- Prefer not to answer

20. Which of the following best describes your employment status?

(CHECK ALL THAT APPLY)

- Work full time
- Work part time
- Retired
- Self-employed
- Student
- Temporarily unemployed or looking for work
- House spouse
- Other (describe:)
- Prefer not to answer

21. Which of the following best describes your ethnic background?

- Caucasian/White
- African American
- Asian American
- Hispanic
- Pacific Islander
- Other:
- Prefer not to answer

22. What is your marital status?

- Single (never married)
- Married or living as married
- Separated
- Widowed
- Divorced
- Other:
- Prefer not to answer

23. Which of the following includes your total household income last year before taxes?

- Under \$25,000
- \$25,000 to \$34,999
- \$35,000 to \$49,999
- \$50,000 to \$74,999
- \$75,000 to \$99,999
- \$100,000 to \$149,999
- \$150,000 or more
- Prefer not to answer

About LAVIDGE & Mosaic Multicultural



LAVIDGE is a Phoenix-based full-service advertising, public relations and digital marketing agency. Since 1982, LAVIDGE has specialized in discovering and communicating insights that engage, motivate and inspire. Agency clients include Phoenix Raceway, McDonald's, United Rentals and many more.

Mosaic Multicultural is a full-service multicultural marketing agency working in partnership with LAVIDGE to provide multicultural advertising, public relations and digital marketing services.



WestGroup Research, headquartered in Phoenix and founded in 1959, is the largest full-service market research firm in the Southwestern U.S., serving a domestic and international client base.



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