

2010 SHE SAYS SURVEY



Will she say yes to your brand?

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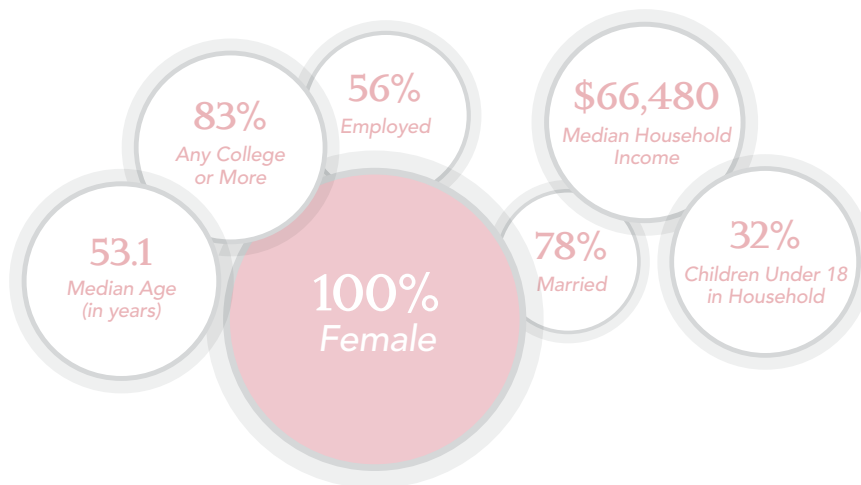
Conventional wisdom says you should spend two months' salary on an engagement ring. That pales in comparison with the nearly \$5 billion healthcare marketers spent last year in direct-to-consumer communications. So were they able to woo consumers? Not always. When it comes to healthcare, what women are looking for to make a long-term commitment is changing dramatically. As a result, the expected ROI can often disappoint rather than dazzle.

BY GRETCHEN GOFFE-WAGNER

How do you market healthcare brands when 56% of women feel pharma advertising does more *harm* than good?

Boomers, known for their willingness to challenge and change the system, are uber-consumers for healthcare: a population aging into high healthcare-consumption years who are more confident, self-reliant decision makers for themselves and their families. Faced with an explosion of conditions, choices, and health communications, they are consuming more but challenging more too. Enter the Ka-Boomer, the woman who is blowing up the model of the past, questioning the trustworthiness and even the need for direct-to-consumer marketing, and relying more on composite decision making than solely on her doctor. This white paper explores who the uber-consumer is, how she makes healthcare decisions, and what makes a proposal more appealing to her. It is based on a quantitative study, conducted December 11-22, 2009, of 1,354 women 18 and older, with an average age of 53, randomly selected from Meredith's *Better Homes and Gardens* reader panel.

Respondent Demographic Profile

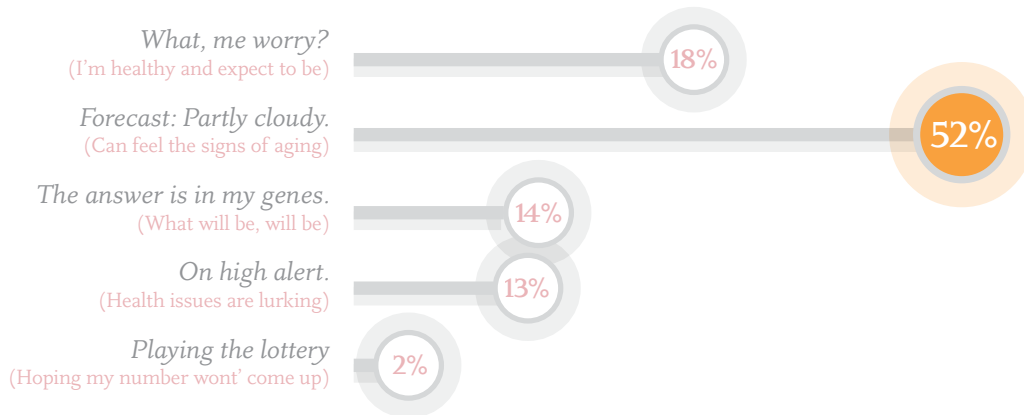


Ka-Boomer Women

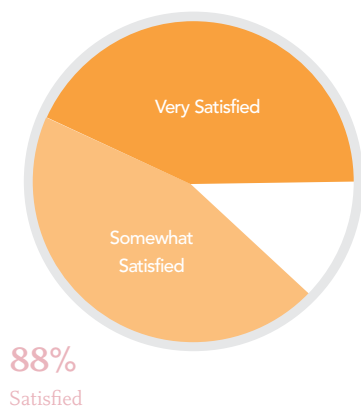
Up-front And Personal

For Boomer women, health issues have become very personal. Half reported they are beginning to feel the signs of aging, and the number of health issues they are at risk for increases dramatically around menopause.

Opinion of Current Health

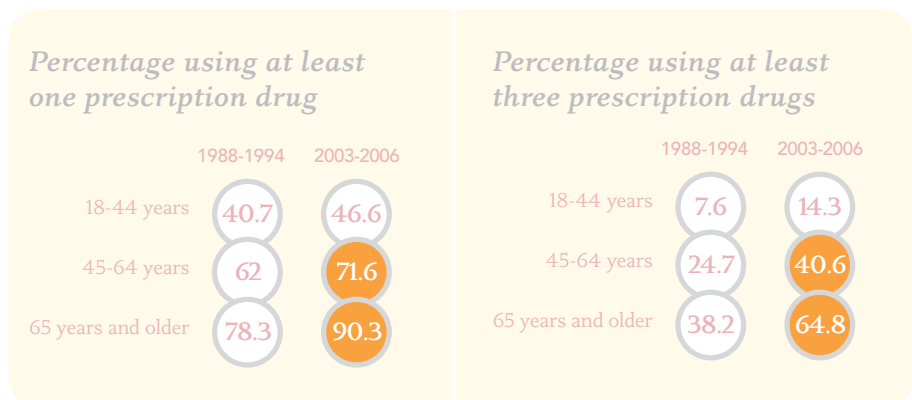


Satisfaction With Current Health Insurance



Consuming More Than Ever

The vast majority of women surveyed have health insurance, with PPO plans, HMO, and Medicare accounting for most of the coverage. 88% of all insured women are satisfied with their coverage. According to the CDC, Boomers are consuming more—41% of women 45 and older are taking 3 or more scripts, up from 25% just 10 years ago.



Source: The CDC/NCHS National Health and Nutrition Examination Survey.

Good Information Is Hard to Find

Finding useful health information to answer their questions is a challenge for Ka-Boomers who are more closely scrutinizing their decisions. A whopping 67% believe the media focuses too much on the negative aspects of healthcare; half feel there is too much illness-specific information and not enough wellness/preventive medicine. Half of women can't tell if the info they find is reputable, and respondents are equally likely to feel there is too much information available (41%) or not as much depth to the information they find (37%).

Agree* With Statements About Health Information—General

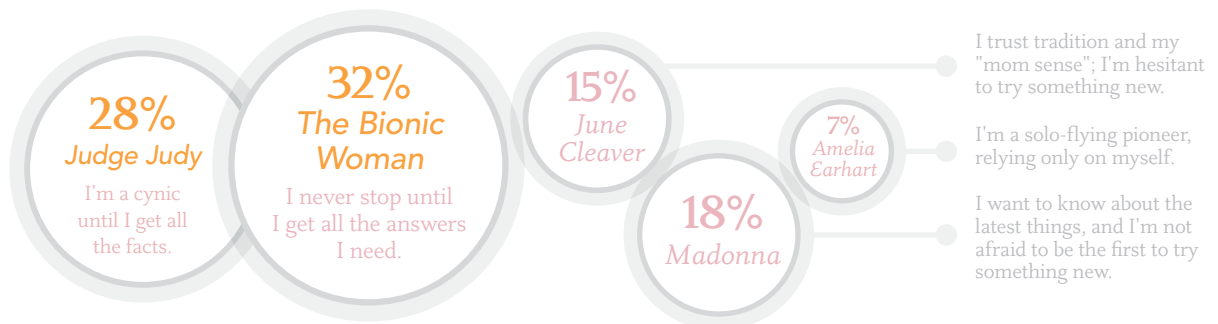


*Net agree a lot/a little.

It Takes the Bionic Woman or Judge Judy to Get the 411

Ka-Boomer women are determined to get their health questions answered. Of 5 personality types, women felt most like the Bionic Woman (I never stop until I get all the answers I need) and Judge Judy (I'm a cynic until I get all the facts) when it comes to getting their health questions answered.

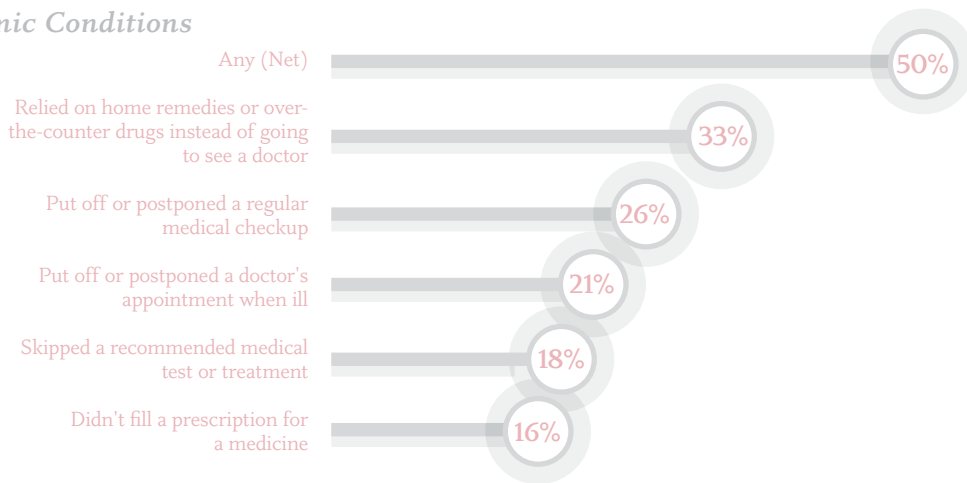
Personality When It Comes to Getting Health Answers



Less Doctor Reliance

While women still report a great deal of trust in their doctors, half of women feel increasingly empowered to rely on themselves rather than on doctors. 83% of women reported they also are confident making health decisions for themselves. The current economic environment has impacted healthcare treatment as well. 50% of respondents have altered their medical treatment in the last year either by postponing doctor visits (33%) or opting for OTC products and home remedies (33%). So how are these women making decisions, and where are they turning instead?

Changes in Past Year Due to Economic Conditions



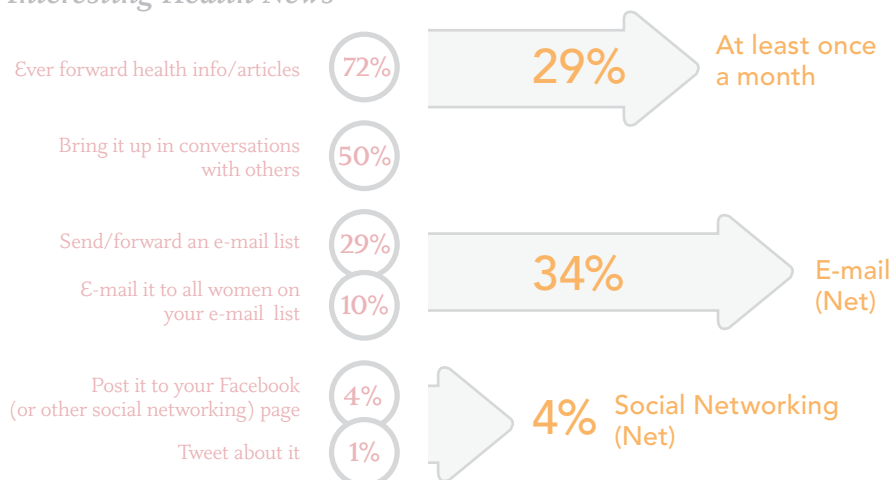
2 in 5

women can be described as "health mentors," to others about healthcare and medications.

She Is a Media Network

Very few women want to do it alone, relying only on themselves. In the same way that moms create a network of shared parenting information, Boomer women are creating a similar and powerful network of healthcare information that is challenging the traditional role of the doctor as the initiator and as the final say. Nearly three-quarters of all women forward health information or articles to others; 3 in 10 do so on a monthly or more frequent basis. Half share through discussions, a third share via e-mail, and 41% provide healthcare and medication advice.

Actions Taken Seeing/Hearing Interesting Health News



How She Makes Health Decisions

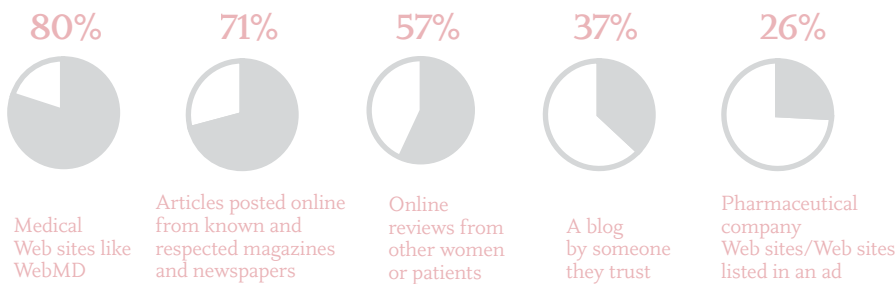
Composite Decision Making

How is she filling the gap as doctor and brand authority declines? Women are composite decision makers who assemble information from multiple and varied sources—her doctor, articles, what her friends say, blogs, and Web sites—for a complete picture before making a long-term commitment to a brand. Increasingly, these are sources of information where brands have less direct control over the dialogue.

Conversation Starters

Most women have asked their doctors about a new prescription—59% often discuss new Rx—and women report their doctors are receptive. When it comes to persuading women to speak with their doctors about a new illness or treatment, the Internet is increasingly their source. Medical Web sites like WebMD and online articles from well-known, respected periodicals drive doctor discussion for 71% of women. Nearly 60% of women are influenced by online reviews from other women/patients.

Influential* Internet Sources Driving Doctor Discussions



*Net very and somewhat influential.

General Reaction to a New Prescription Medication



P.S. I'll Think It Over

Ka-Boomers are challenging the traditional role of the doctor as the initiator and as the final say in decisions on health brands and rejecting brand authority. The “point of sale,” long considered to start and end with the doctor appointment, is now more fluid, extending before and after the appointment. 40% of women continue their evaluation before deciding if they will fill a new prescription after leaving the doctor’s office, giving a new significance to the post-script conversation. Some want to check the cost, but for the majority, it means checking out side effects.

A More Appealing Proposal

Women have a high standard for information and claims for prescription brands—and a high level of cynicism. Accordingly, the information she needs and wants in a proposal is changing in ways that have important implications for marketers on messages, branded and unbranded approach, and creative.

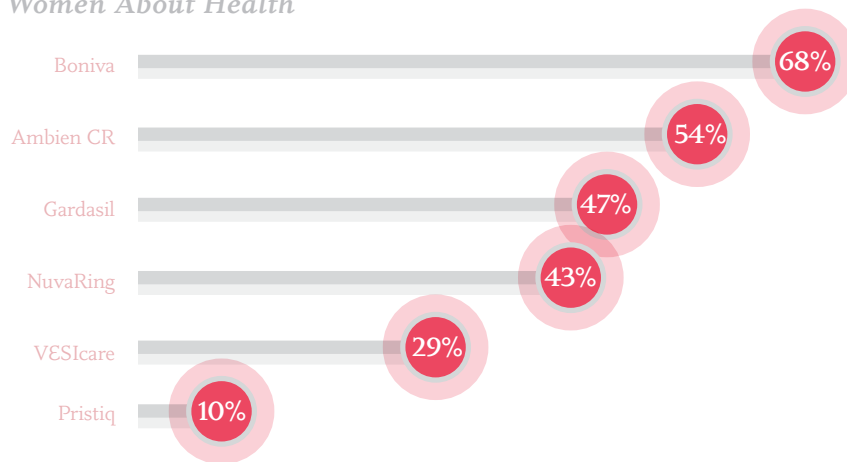
Give Her the Missing Pieces

A critical and often missing piece of information women want before making a long-term commitment to a brand is side effects. 80% of women pay attention to the side effects in TV ads, and 64% read the small print in magazine/newspaper ads if they are interested in the brand. By emphasizing the benefits of brands and relegating the risks to fair balance, brands have created the belief among many women that they are more interested in profit. Women also want to understand how the drug works in their body, including videos or visuals. 41% of women would like to see stories from real patients or women like them.

Boniva, Ambien, Gardasil, and NuvaRing were all seen by 40% or more women as doing a good job of communicating with them about their health. They were praised for straightforward, clear, and realistic messaging, as well as explaining the product benefits and side effects.

“... give all the facts during the advertising. Not just the little speed version at the end.”

Brand/Company Does a Good Job of Communicating With Women About Health



Boniva

“The commercials help explain how it will help me as a woman and what it will do to help my health.”

Ambien CR

“Explains the problem, how it’s used, and the side effects.”

Gardasil

“This is the one ad that persuaded me to talk to my pediatrician.”

“They explain the risks and benefits and also that boys can take it, as well as girls.”

NuvaRing

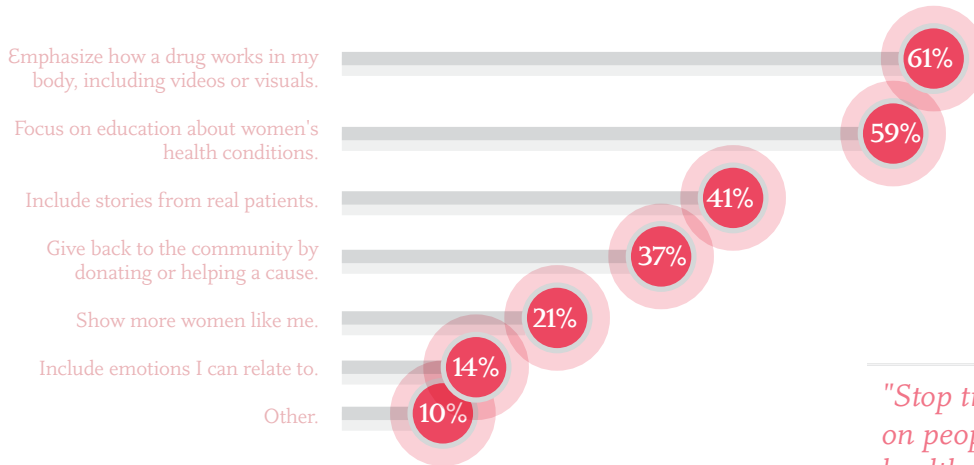
“They give straightforward information about the product; they identify potential problems that could occur using the product; and they’re up-front about the product not being suitable for everyone.”

*"Become trustworthy...
patient before pocketbook
as they say."*

Less Selling and More Serving

What makes a proposal more appealing? For Ka-Boomers, a brand's actions speak louder than words. Credibility and trust are improved when brands focus less on themselves and selling and more on promoting health and serving the community. Women would like to see marketing focused on education about health conditions, not just brands. Brands who give back to the community by donating or helping a cause gain credibility and trust.

Ways to Improve Credibility and Trust in Pharmaceuticals



*"Stop trying to push drugs
on people, and encourage a
healthy lifestyle."*

Try Adding a Little Wellness

All of this is driving women to consider non-Rx solutions and wellness as ways to meet health and wellness goals. 83% of women agree that consuming foods with health benefits (such as yogurt with probiotics) can help improve one's health. Cheerios, Weight Watchers, Tylenol, and Activia are seen as doing a particularly good job of communicating the health benefits of their brands.



Gretchen Goffe-Wagner is SVP brand planner and manages the strategic consulting business at Pink Tank, the marketing-to-women division of GSW Worldwide.

The follow-on to "Will She Say Yes?" is Pink Tank's "Direct To Yes" presentation that identifies ways your brand can create a long-term relationship with female patients or caregivers. For more information, contact Gretchen at ggoffe@gsw-w.com.