



## **F.C.T. Healthcare Executive Summary: The Prescription for Healthcare Advertising**



## Background:

In May 2014, the Radio Advertising Bureau and Presslaff Interactive Revenue partnered to provide RAB member stations with a national online healthcare survey of local radio listeners' preferences in handling their healthcare needs. To date, F.C.T. surveys have aided radio station sales efforts and advertisers alike by highlighting listener interests and buying intentions in the Automotive, Shopping and Home Improvement categories. The subject of this summary is Healthcare.

The Healthcare Report is based on responses collected between May 1, 2014 and May 22, 2014, from radio listeners of 28 different broadcast companies, representing 165 individual radio stations. Survey response was driven through multiple platforms: on-air, online, emails to station databases and social media. Listeners were asked to participate in the survey in return for the opportunity to win a \$500 gift card.

The survey drew over 9,000 responses from across the country and provided healthy insights on healthcare needs, interests and influences. The following executive summary shows results for all participants, men, women, 25 to 44 year olds, and adults 45 plus.

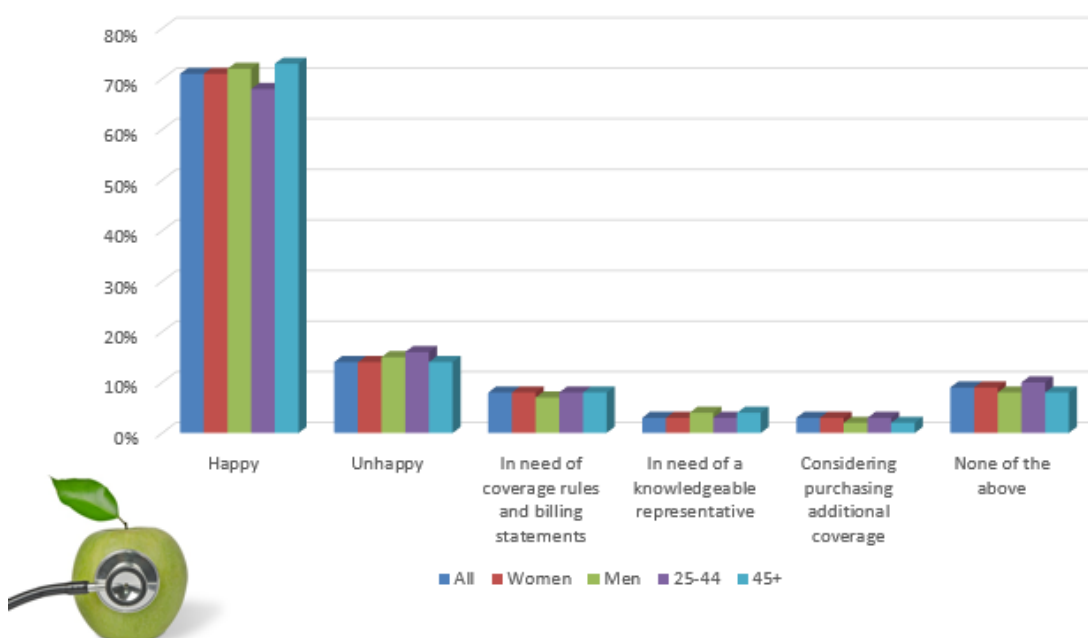


## Are Listeners Feeling Good About Their Coverage?

In a word, yes. These respondents are happy with their coverage, with satisfaction among both men and women reaching past 70%.

### Feeling About Current Coverage:

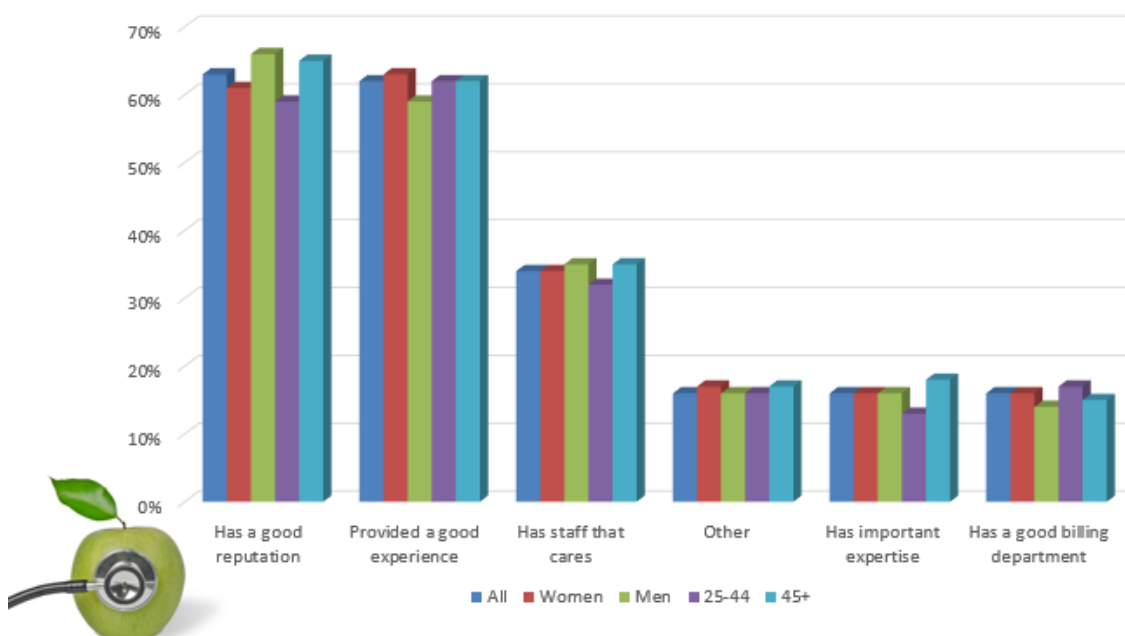
*When considering your healthcare coverage, are you... (choose all that apply)*



This satisfaction extends beyond feelings about healthcare coverage to general feelings about their most highly recalled local hospitals. Respondents were asked to describe their 'top of mind' hospital and the responses were generally positive, with a good reputation and a good experience being the top two impressions noted.

## Impressions of Local Hospitals...

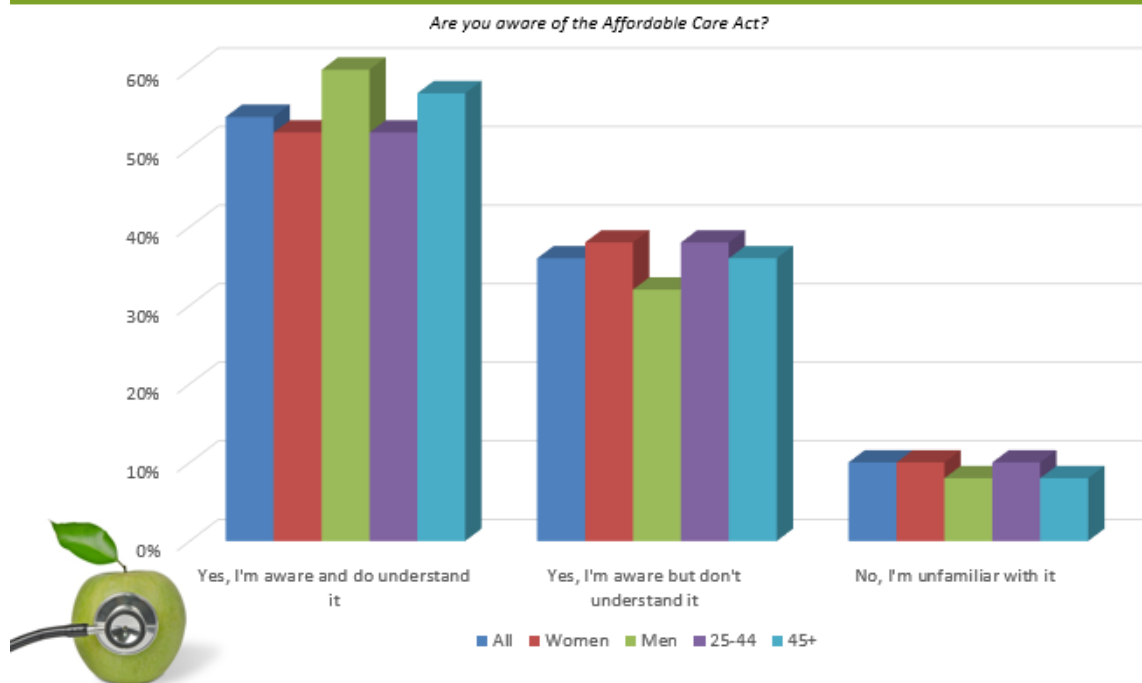
*Which of the following describes the local hospital that first comes to mind? (choose all that apply)*



## Awareness of the Affordable Care Act:

While over half the respondents report being aware of and understanding the Affordable Care Act (ACA), there is still a great deal of work to be done educating consumers. Over one-third (36%) report being aware of the ACA, but not understanding it, and another 10% say they're not aware of it.

## Familiarity with the Affordable Care Act



**Opportunity:** Per this survey, 46% of consumers need to better understand the ins and outs of the Act, registration, options, etc. This could happen through on-air commercials, email newsletters, video interviews, shared experiences, on-site events, healthcare expos, etc. The need to inform and educate exists.



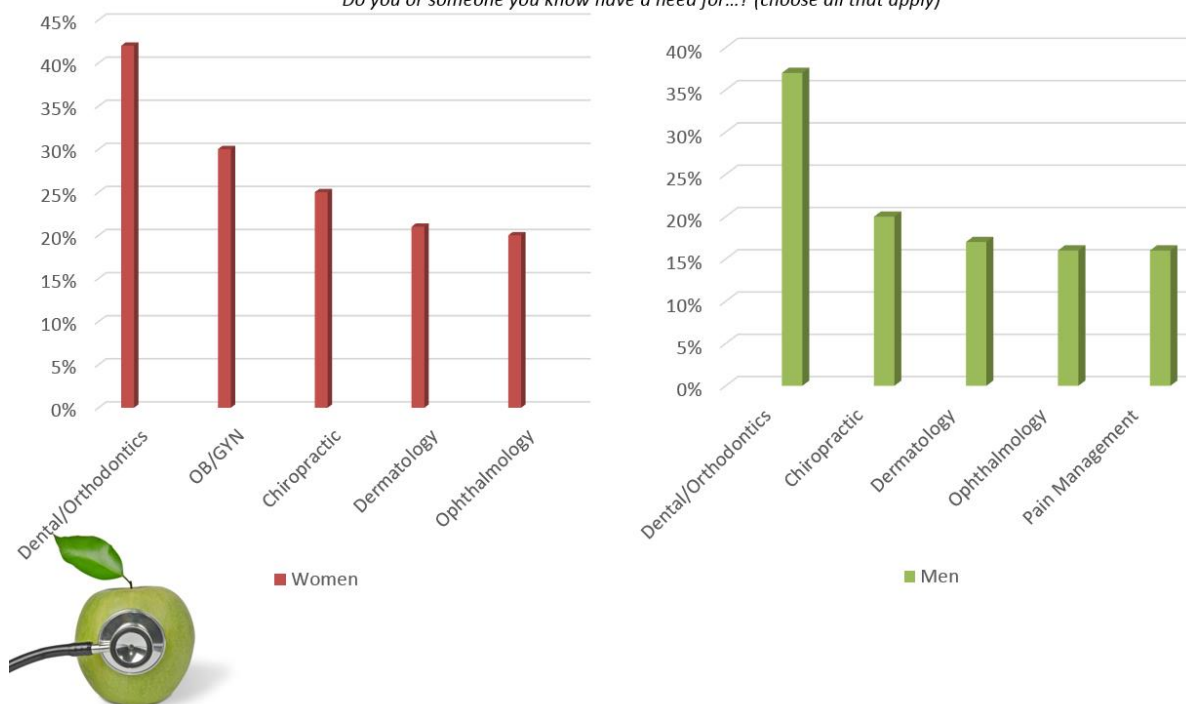
## Specific Healthcare Needs:

These respondents have a wide variety of healthcare needs. Top categories include:

- Dentists/Orthodontists
- Chiropractors
- Dermatologists
- Eye Doctors
- For women - OB/GYNs
- For men - Pain Management Specialists

## Women and Men's Top 5 Needs

*Do you or someone you know have a need for...? (choose all that apply)*



# Needs For an Aging Population

(all respondents)



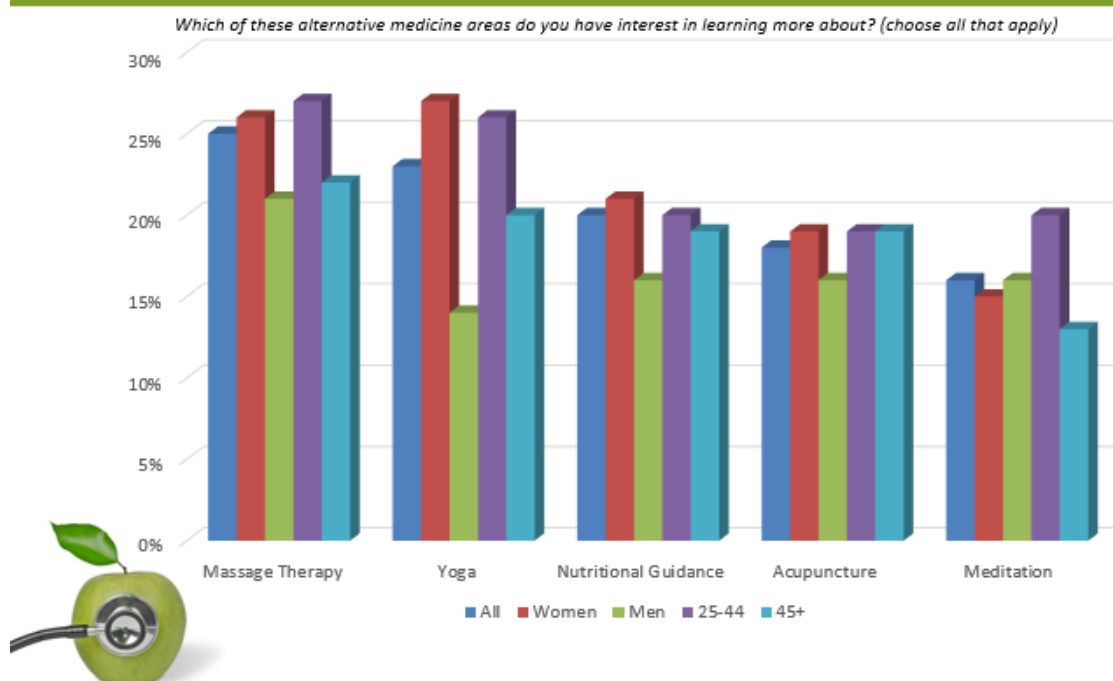
**Opportunity:** Over 20% of the respondents selected an elder-care related need. When aging population healthcare needs were combined (Assisted living, Alzheimer Care, In-home Care Providers, etc.), it created a category that would have ranked second or third among top needs.



Interest in the 'alternative' medicine categories include:

- Massage Therapy for 1 in 4 respondents
- Yoga for 1 in 4 women and 25 to 44 year olds
- Nutrition Guidance of interest for 1 in 5 overall.

## Top 3 Alternative Medicine Interests...



**Opportunity:** Health professionals in each of these categories will find willing consumers in this respondent group.

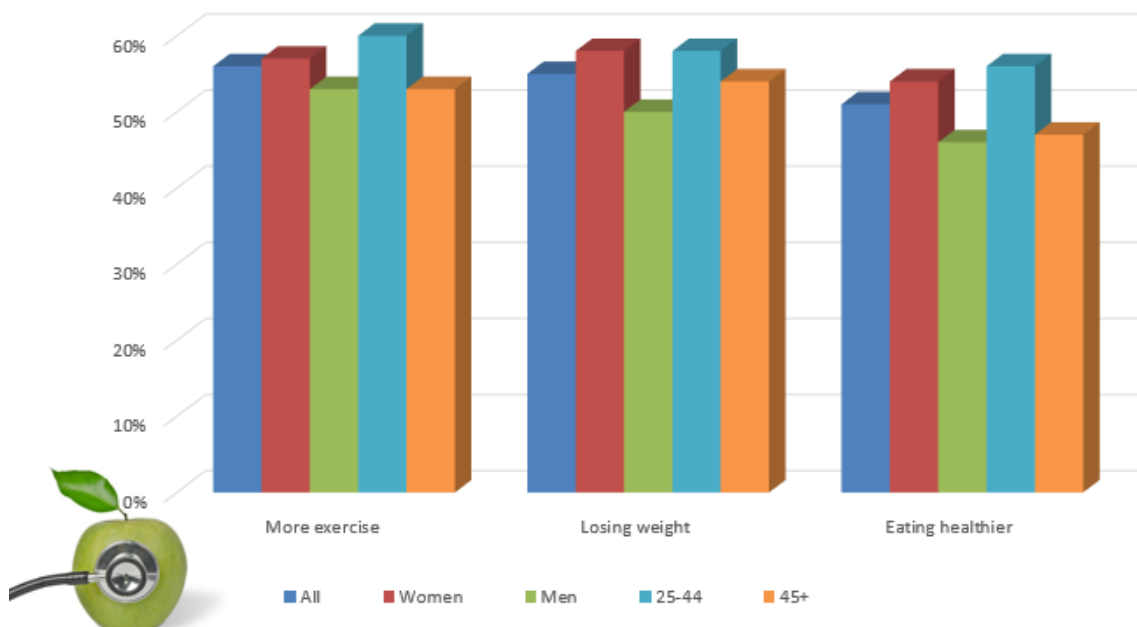




More than half of all respondents are considering getting more exercise, losing weight and eating better. Nutritionists, gyms, weight loss clinics/programs, consumer packaged goods and restaurants targeting healthier eating choices should pay attention to this, as should radio station marketing departments.

## Top 3 Additional Healthy Living Preferences...

*Are you considering any of the following? (Check all that apply)*



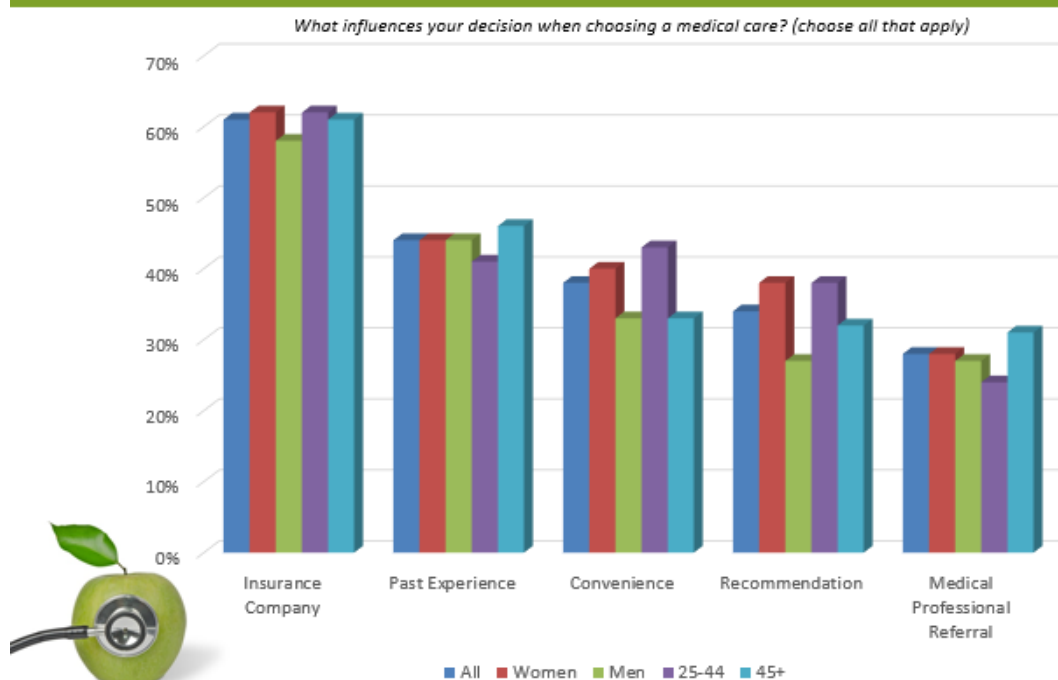
**Opportunity:** Knowing these categories are of interest to listeners can help inform promotions and determine subjects for personality testimonials.



## From Listener to Patient:

Stating that a procedure is covered by most insurers appears to be a sure way to motivate this group, with over 60% of respondents indicating that insurance plays an instrumental role in making their medical care decisions.

## Influences on Choosing Medical Care:



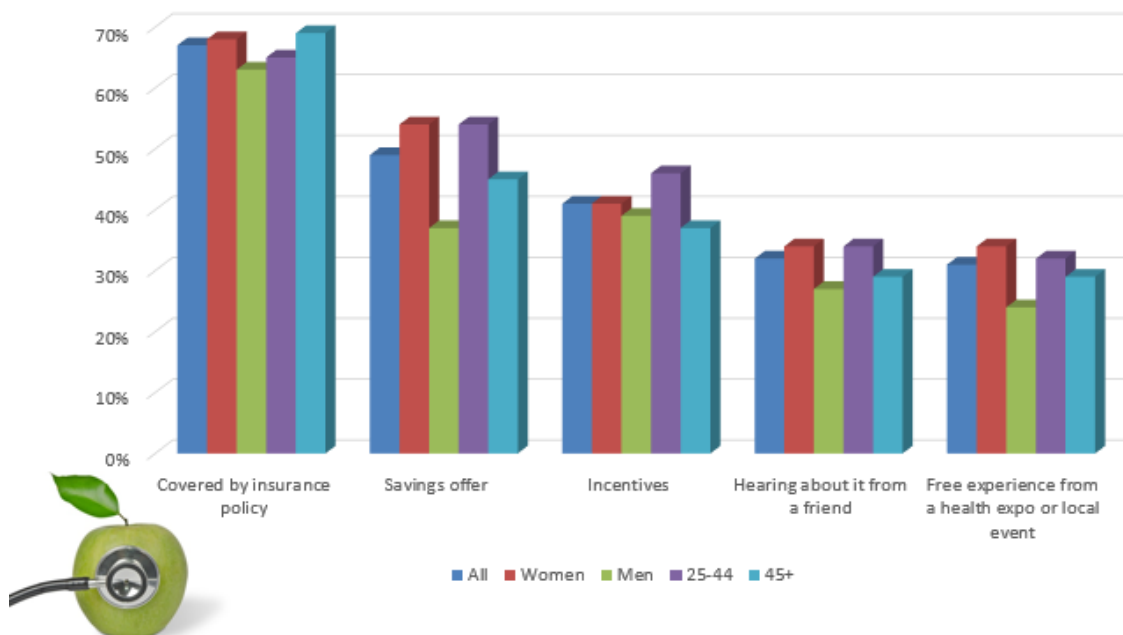
**Opportunity:** Incorporating testimonials about past experiences, convenience (hours, location, wait-times), recommendations, and 'checking with your medical professional' all point to smart creative and copy points for advertising within the healthcare industry.



Insurance again plays a major role when considering **new services**, as does savings, incentives, word of mouth and free exposure to the service at a health expo or local event.

## Top 5 Motivations to Try New Services

What would motivate you to try new services? (choose all that apply)



**Opportunity:** Almost one quarter of these respondents (23%) would be interested in attending a health expo.



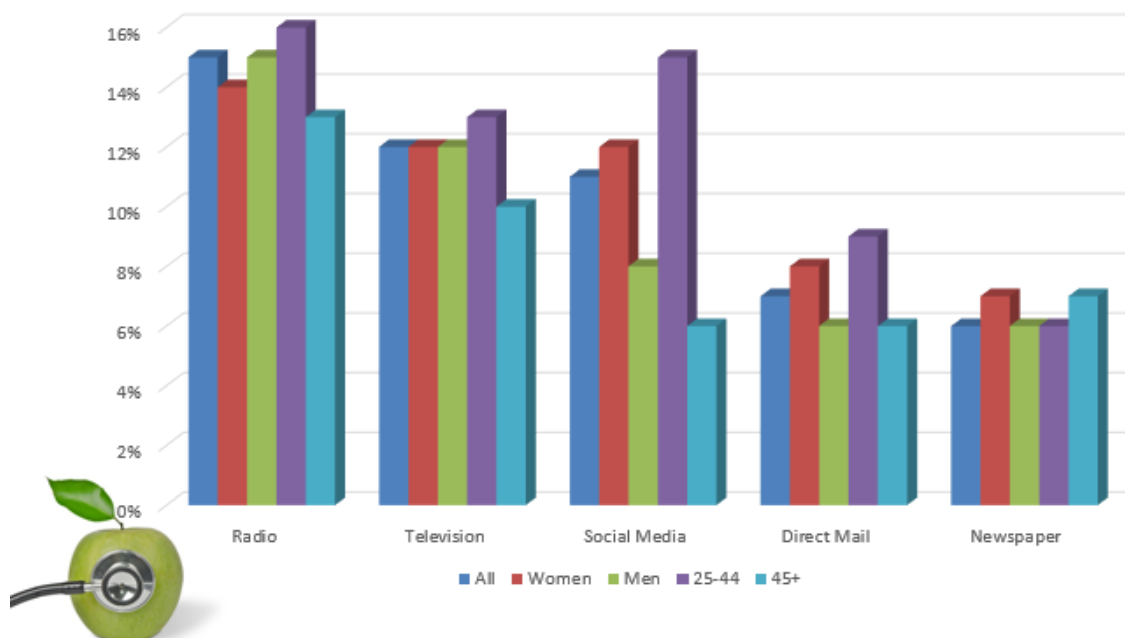
## Reaching the Ready Healthcare Consumer – Media Influences:

How do you reach respondents with needs similar to the ones outlined in this report? Radio topped Television, Social Media, and Direct Mail and was twice as effective as Newspapers among those selecting a specific type of advertising as having an effect on choosing their healthcare services.

Among the 25-44 year old demo, social media has a growing influence and should impact how digital assets (whether advertiser or radio station) can support an advertising campaign.

### Advertising Influences (Of those choosing an influence)

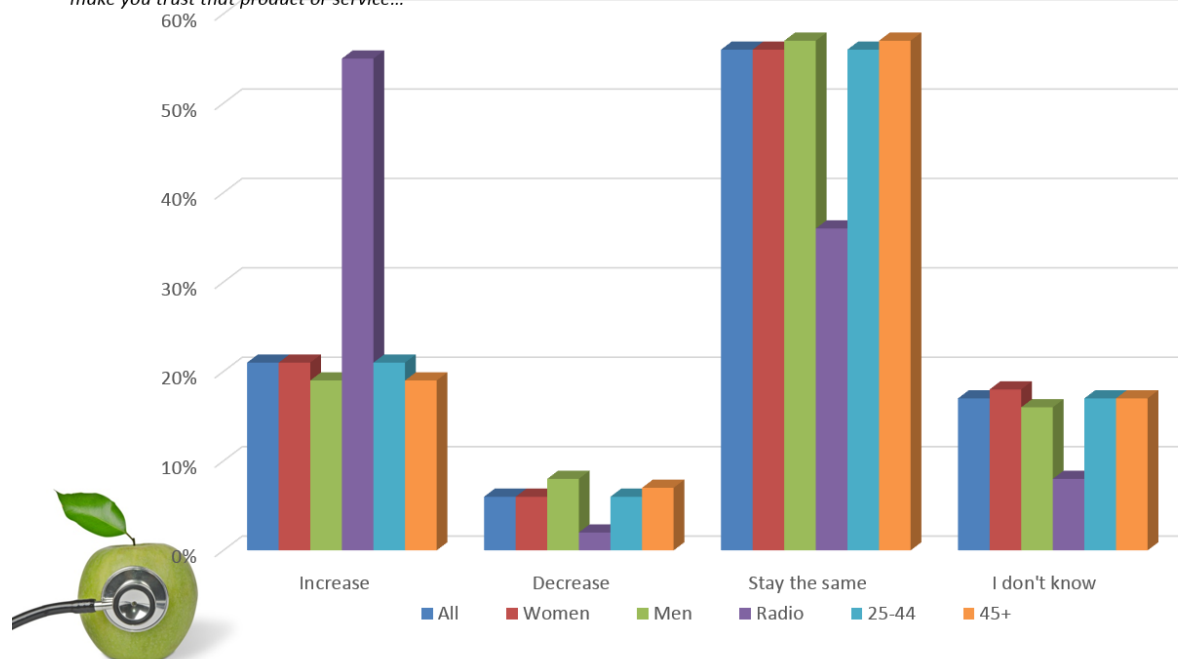
*What kind of advertising influences your choice of health care/medical services? (choose all that apply)*



Testimonials are very important to the radio-influenced group. The power of personality cannot be overstated. Over 50% of this group says that a favorite radio personality testimonial positively increases their trust in health care or medical products or services.

## How A Favorite Radio Personality's Testimony Affects Listeners' Trust

*Does hearing one of your favorite radio station personalities provide testimonials for health care or medical products or services make you trust that product or service...*



**Opportunity:** The listener – radio personality connection is invaluable. Enlist your personalities in winning campaigns on behalf of your healthcare clients.



## In Summary:

The diagnosis is complete. This pool of respondents shows a healthy interest in healthcare products and practice. Key takeaways:

- They have generally positive feelings about their own healthcare experiences.
- Two key reasons that a local hospital is top of mind: Reputation and Experience.
  - Advertising should be used to help support these top of mind impressions.
- While they have a high awareness for the Affordable Care Act, there is still a need for understanding the Act.
- Dentists/Orthodontists, Chiropractors, Dermatologists, Ophthalmologists, Nutritionists, Massage Therapists, Gyms and Weight Loss clinics were some of the top service needs selected.
- They have a need for Elder care services.
- Understanding their insurance and what procedures are covered is key. It will impact their decision to seek out new services.
  - Tip: Be sure to highlight past experience, recommendations, convenience and savings in healthcare related advertising.
- When it comes to advertising influences, they indicated radio is effective as the healthcare advertising medium for both genders and age groups.
- Local Radio Personalities can play a key role in generating trust for healthcare services.

