

HealthEngagement Barometer

October 16, 2008



Health Under Pressure



Health Demands Mount

Populations aging

Behavior-related chronic conditions

Global pandemics

Diseases of poverty

Expensive innovations



License to Operate at Risk



Companies' and organizations' license to operate is harder to earn and keep

Trust and confidence are down

Demands are high – for transparency and social responsibility

Safety concerns create skepticism and distrust

Pivotal relationships stressed

Financial Meltdown Exacerbates A Health Crisis Already In Force

People forego or postpone essential health care

Loss of insurance or failure to pay

Health behaviors erode

Cost trumps quality

Mental health issues emerge



Democratization of Information



Stakeholders are more connected –
changing the relationship dynamic

Dispersion of authority

Health information revolution

Desire to socialize -- share opinions
and thoughts

Toward Health Engagement

There is no simple or quick solution.

But the way forward calls for all stakeholders –
institutional and individual –
to build trusting relationships,
participate actively and assume responsibility –
that is, engage.

Health Engagement

Health engagement is the interaction among stakeholders in health – on the topics that matter, and through the channels and sources where information and opinions are gathered, formed and shared.

Five-Country Study of General Population

Twenty-minute online survey conducted by StrategyOne in September 2008 among 5,183 adults, 18-75 years old

	Global	US	UK	Germany	Russia	China
Sample size	5,183	1000	1078	1000	1081	1024
Margin of Error: Total	+/- 1.4%	+/- 3%	+/- 3%	+/- 3%	+/- 3%	+/- 3%
Margin of Error: Health Info-entials	+/- 2.9%	+/- 6.9%	+/- 8.3%	+/- 6.5%	+/- 5.1%	+/- 6.7%
Representative on		Gender Age Income Education Region Ethnicity	Gender Age Income Education Region	Gender Age Income	<i>Urban areas:</i> Gender Age Income	<i>Urban areas:</i> Gender Age Income

Health Engagement – Increasingly Important



Health Engagement on the Rise

I am becoming more actively engaged in
Health Issues

63%

I am becoming more actively engaged with
Health Products and Services

60%

I am becoming more actively engaged with
Companies and Organizations
involved in health

40%

Base = Adults

Please indicate how much you agree or disagree with each of the following statements. (strongly/somewhat)

People Crave Even More Health Engagement

It's increasingly important that
Companies and Organizations
involved in health engage with me

70%

It's increasingly important that
Health Products and Services
engage with me

75%

Base = Adults

Please indicate how much you agree or disagree with each of the following statements. (strongly/somewhat)

A Highly Engaged Group is Leading in Health Influence



Health Engagement Barometer

We Looked at People Through Three Lenses

Health Involved:

How involved are you with health issues?

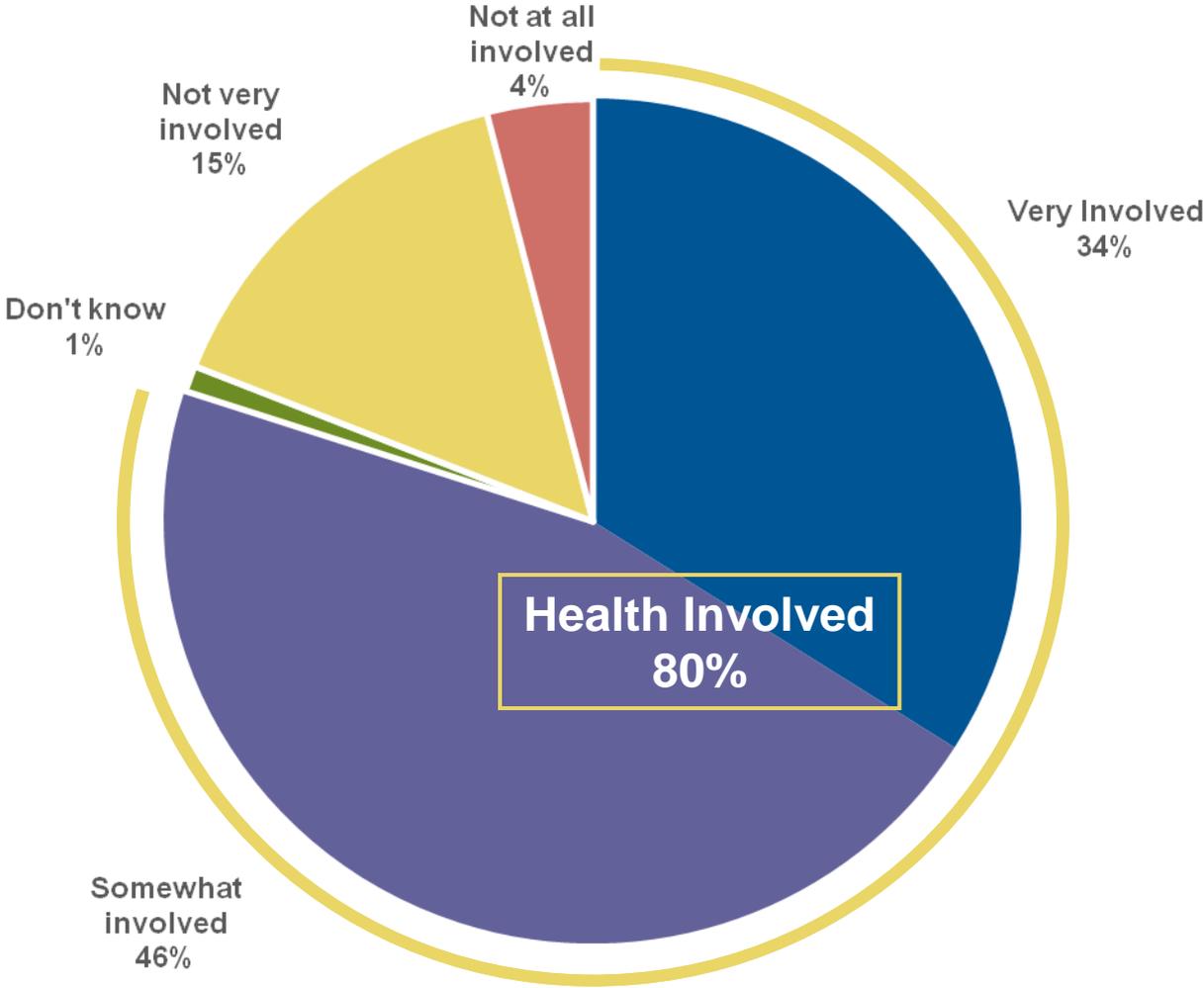
Health Informed:

How often do you read or gather information about health issues?
How often do you share information about health issues?

Health Engaged:

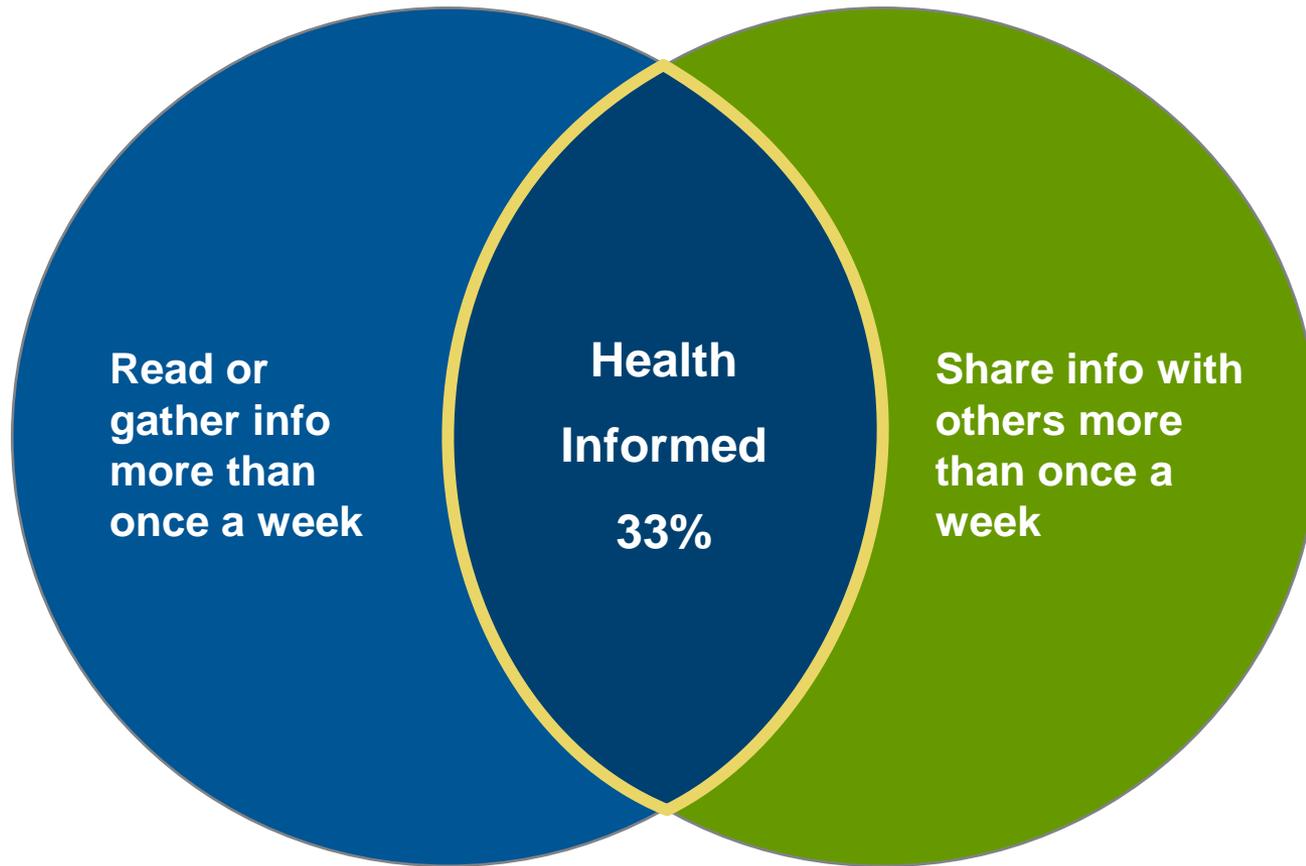
What best describes how you typically engage with health issues?

4 out of 5 People are Health Involved



Base = Adults
In general, how involved are you with health issues? (very/somewhat)

1 out of 3 People Is Health Informed

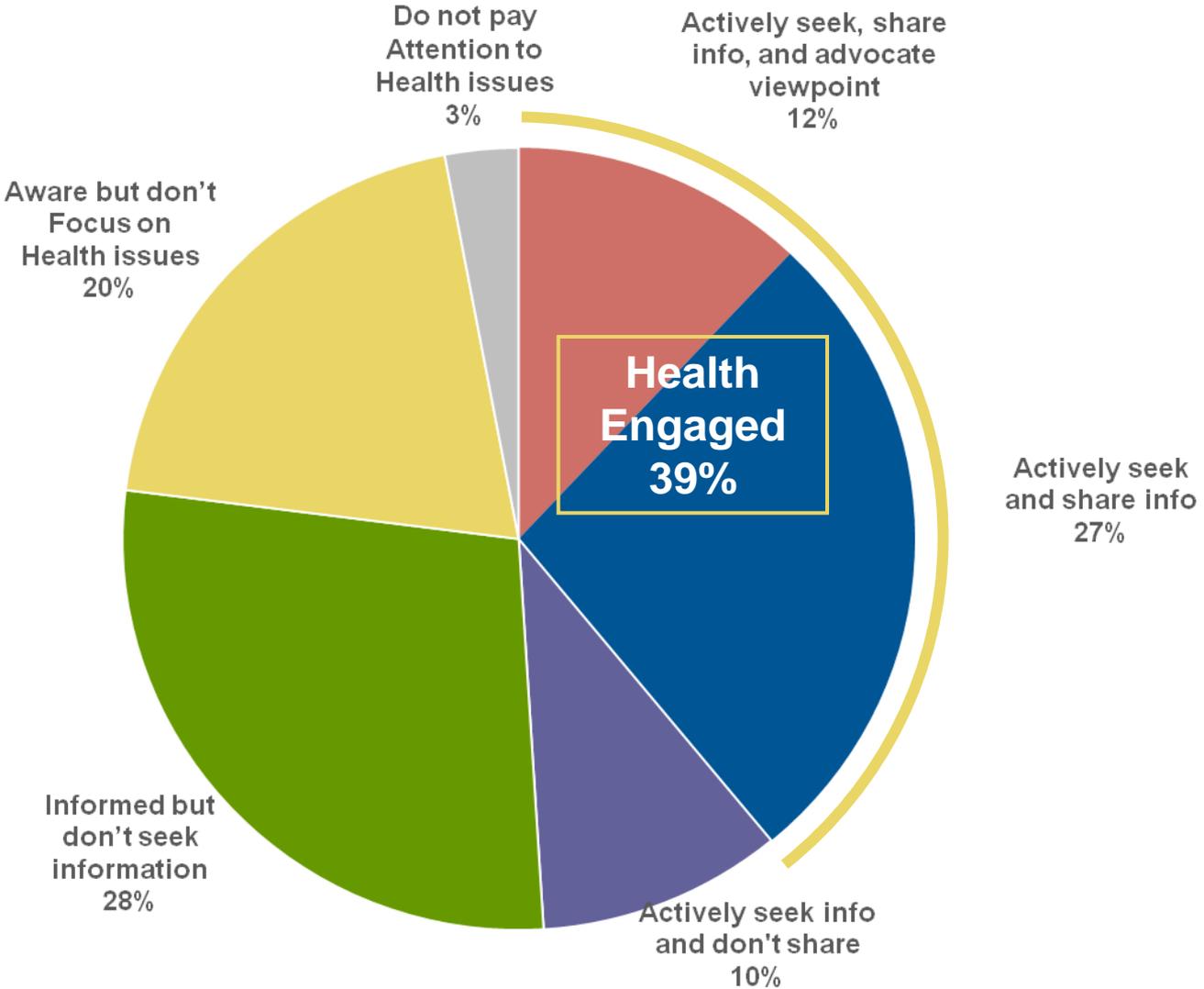


Base = Adults

How often do you read or gather information about health issues?

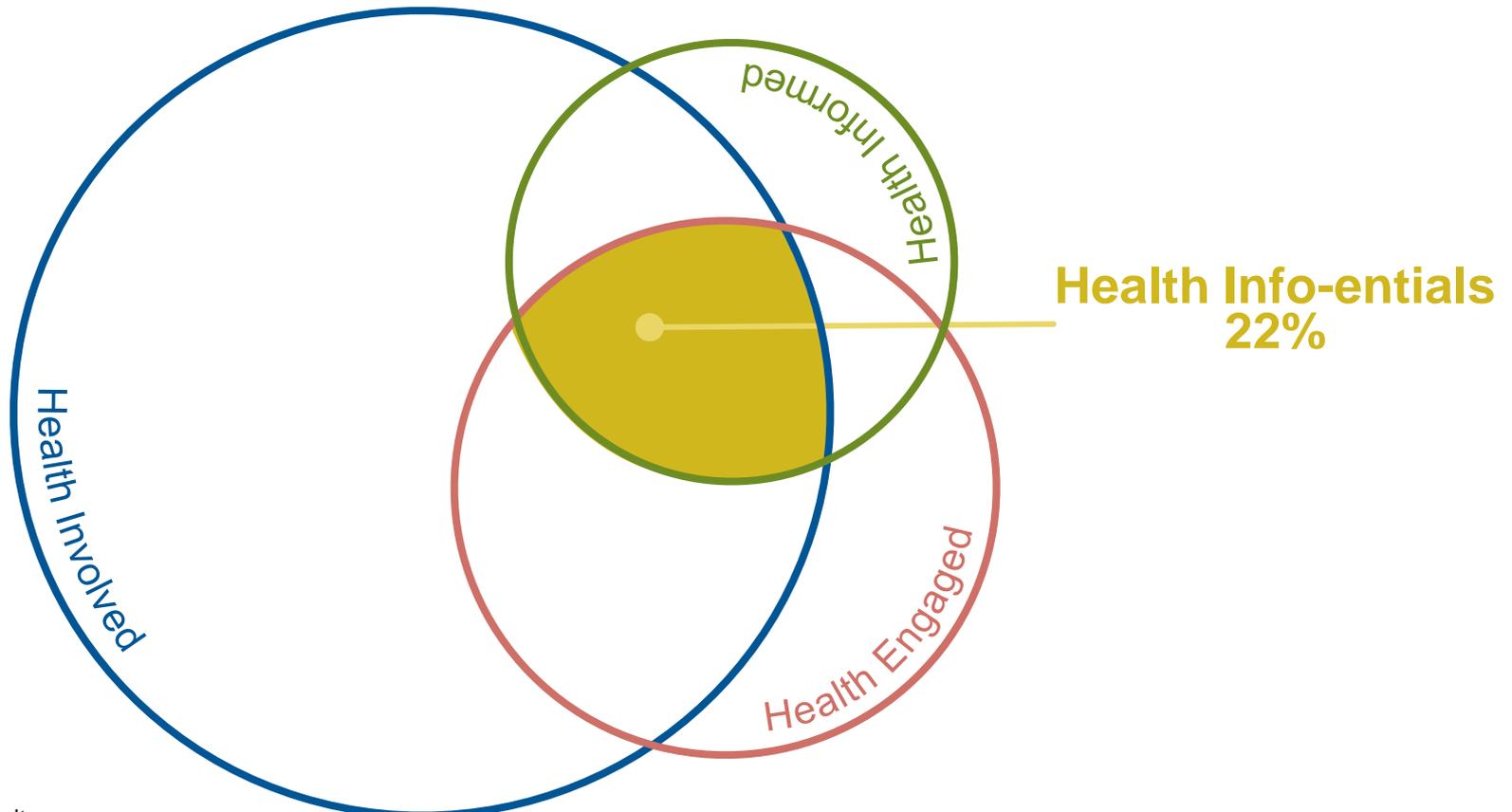
How often do you share information about health issues you see, read, or hear about?

2 out of 5 People are Health Engaged



Base = Adults
Which, if any, of the following best describes how you typically engage with health issues?

1 out of 5 People Is A Health Info-ential



Base = Adults

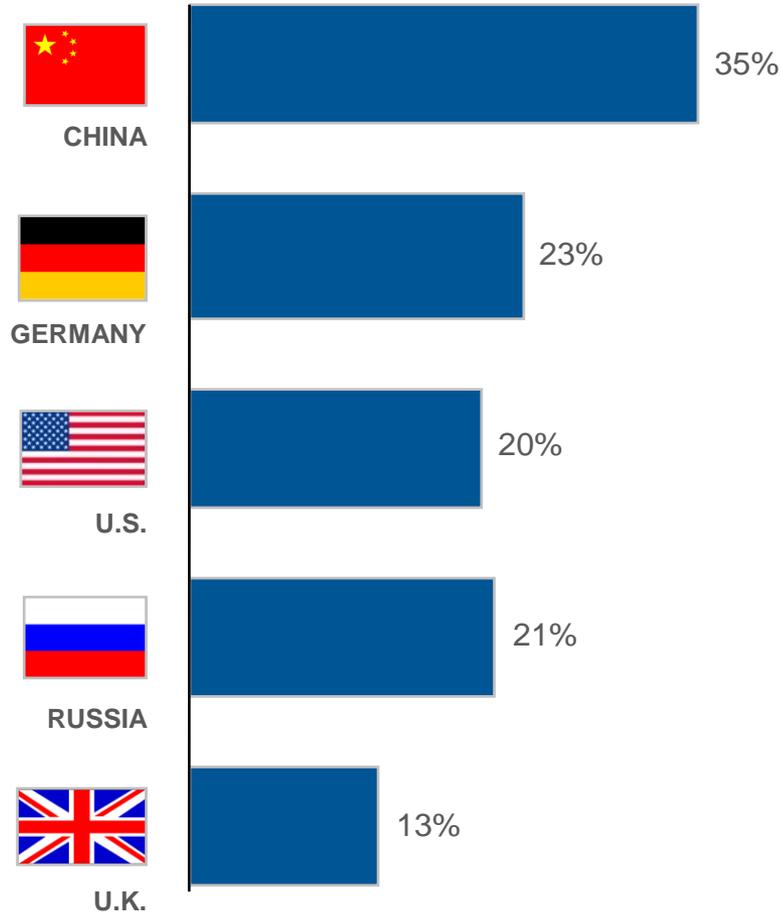
In general, how involved are you with health issues? (very/somewhat)

How often do you read or gather information about health issues? (few times a week or more)

How often do you share information about health issues you see, read, or hear about? (few times a week or more)

Which, if any, of the following best describes how you typically engage with health issues? (actively seek/share; actively seek/share/advocate)

Health Info-entials: Most in China, Fewest in UK



Base = Adults

In general, how involved are you with health issues? (very/somewhat)

How often do you read or gather information about health issues? (few times a week or more)

How often do you share information about health issues you see, read, or hear about? (few times a week or more)

Which, if any, of the following best describes how you typically engage with health issues? (actively seek/share+ actively seek/share/advocate)

Health Info-entials: More Stakes in Health



More likely to
work in the
health field

26% vs. 18%



More likely to have
severe or chronic
health conditions

41% vs. 34%



More likely
to be a
caregiver

17% vs. 11%



More likely to take
prescription
medications

47% vs. 41%

Health Info-entials vs. Adults

Health Info-entials: From All Walks of Life

No differences in age

No differences in income levels

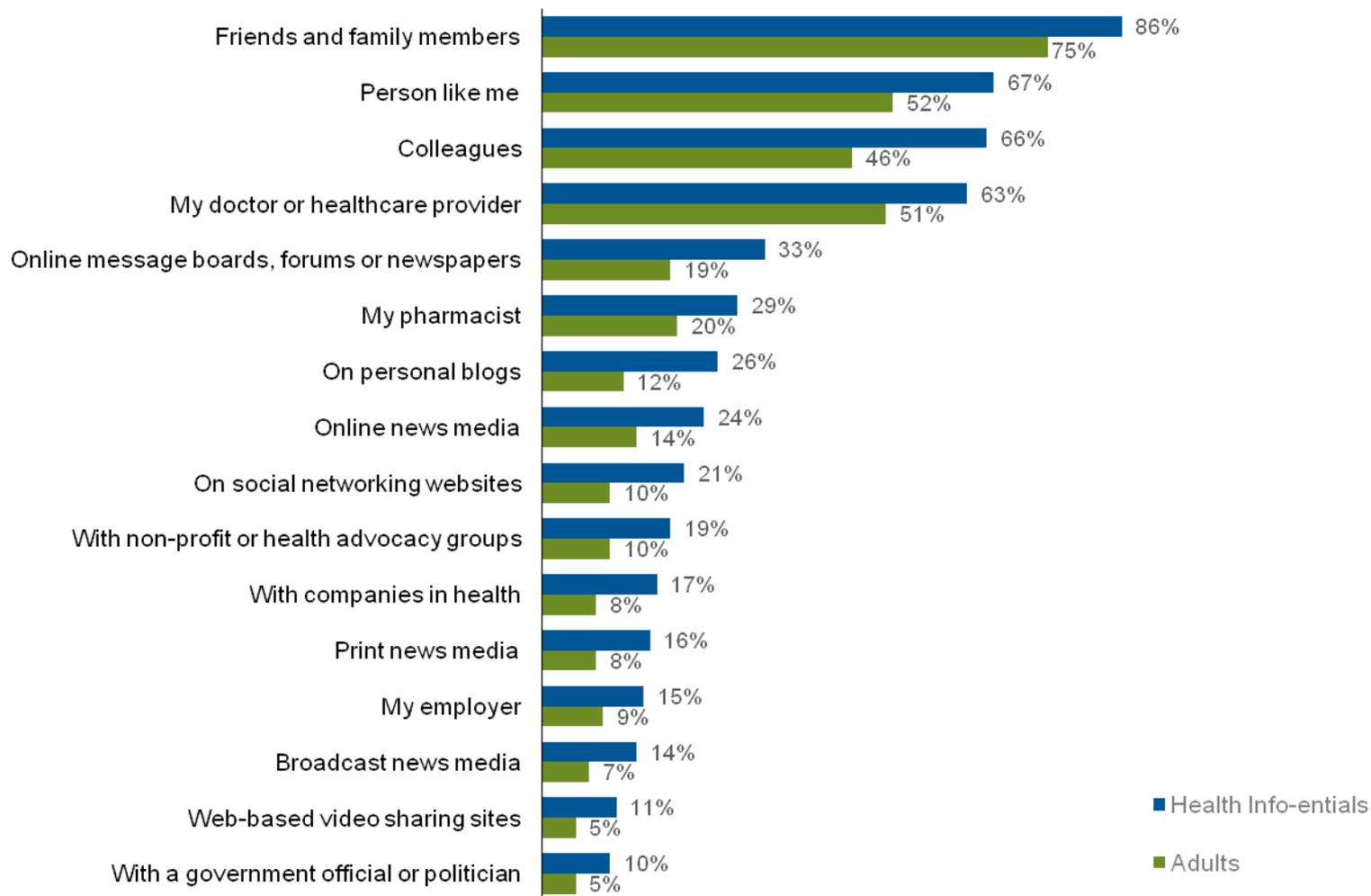
No differences in marital status

Slight differences (Health-Info-entials vs. Adults):

- More likely to be women (50% vs. 46%)
- More likely to have children (41% v. 35%)
- More likely to be employed (71% vs. 65%)

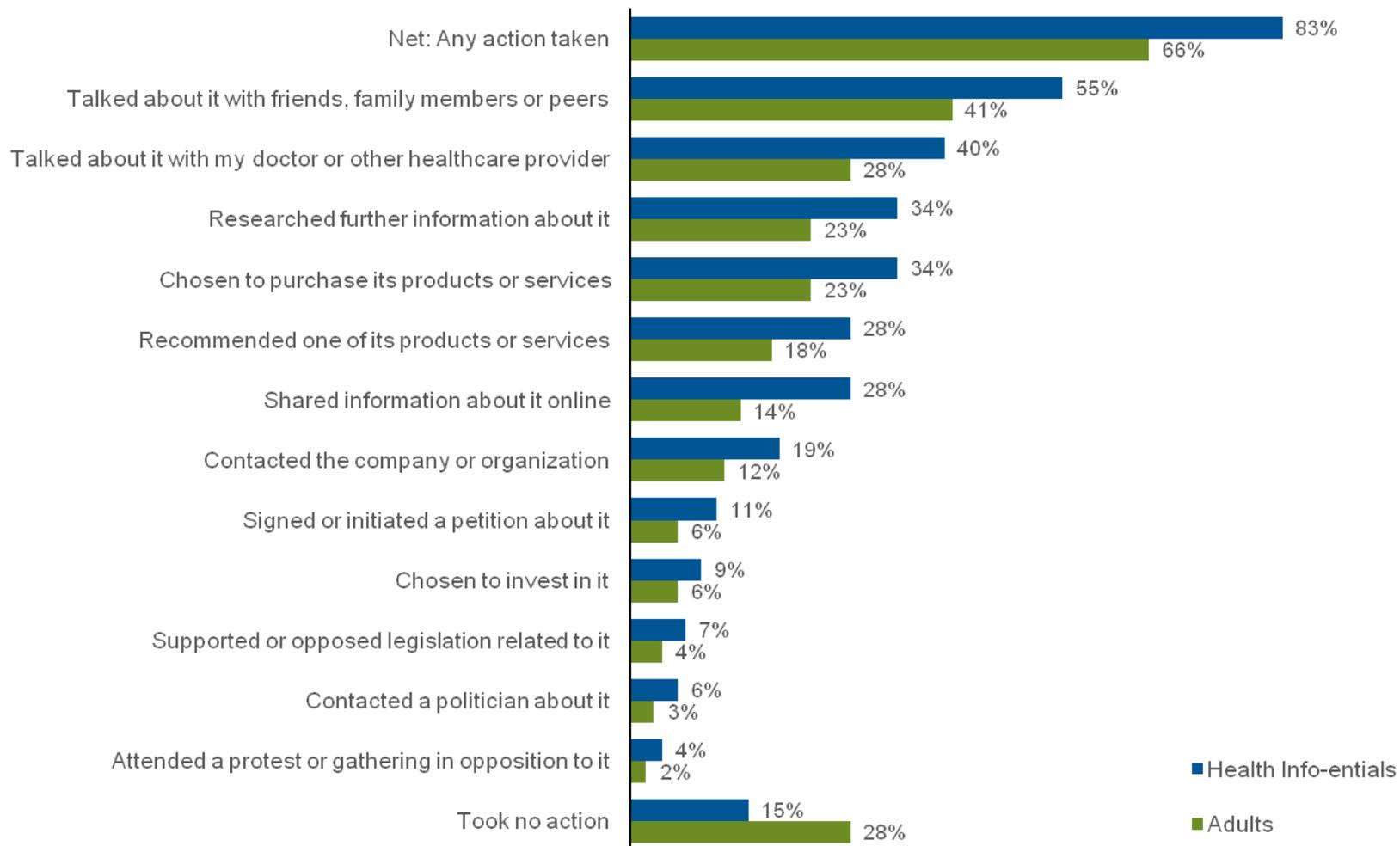


I Share Most With People I Know



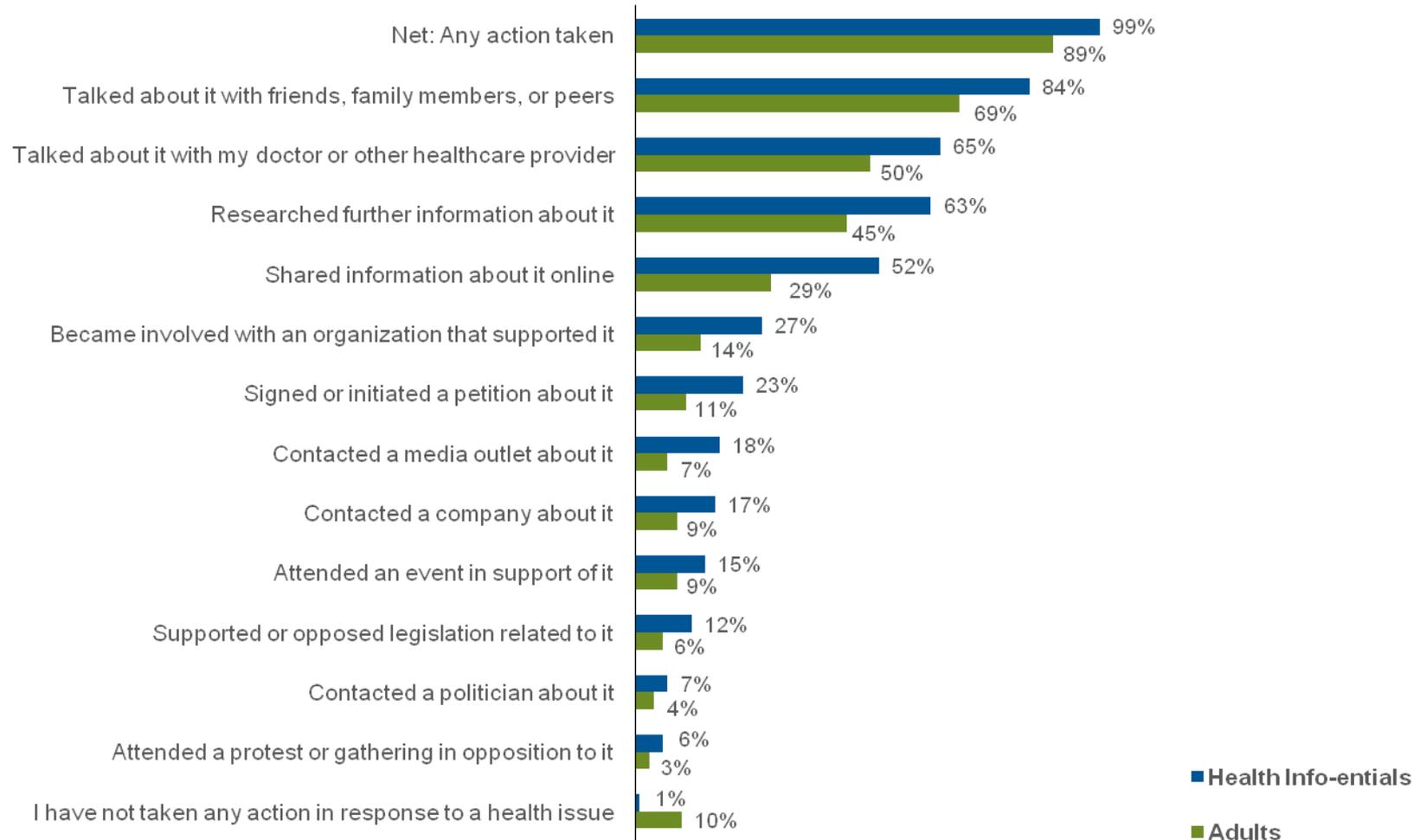
With which of the following do you typically share information or opinions about health issues?

I Speak Up and Act On My Opinions About Companies and Organizations



Thinking about companies and organizations involved in health that you are engaged with, which, if any, of the following actions have you taken in response to a company or organization?

I Speak Up and Act On Health Issues

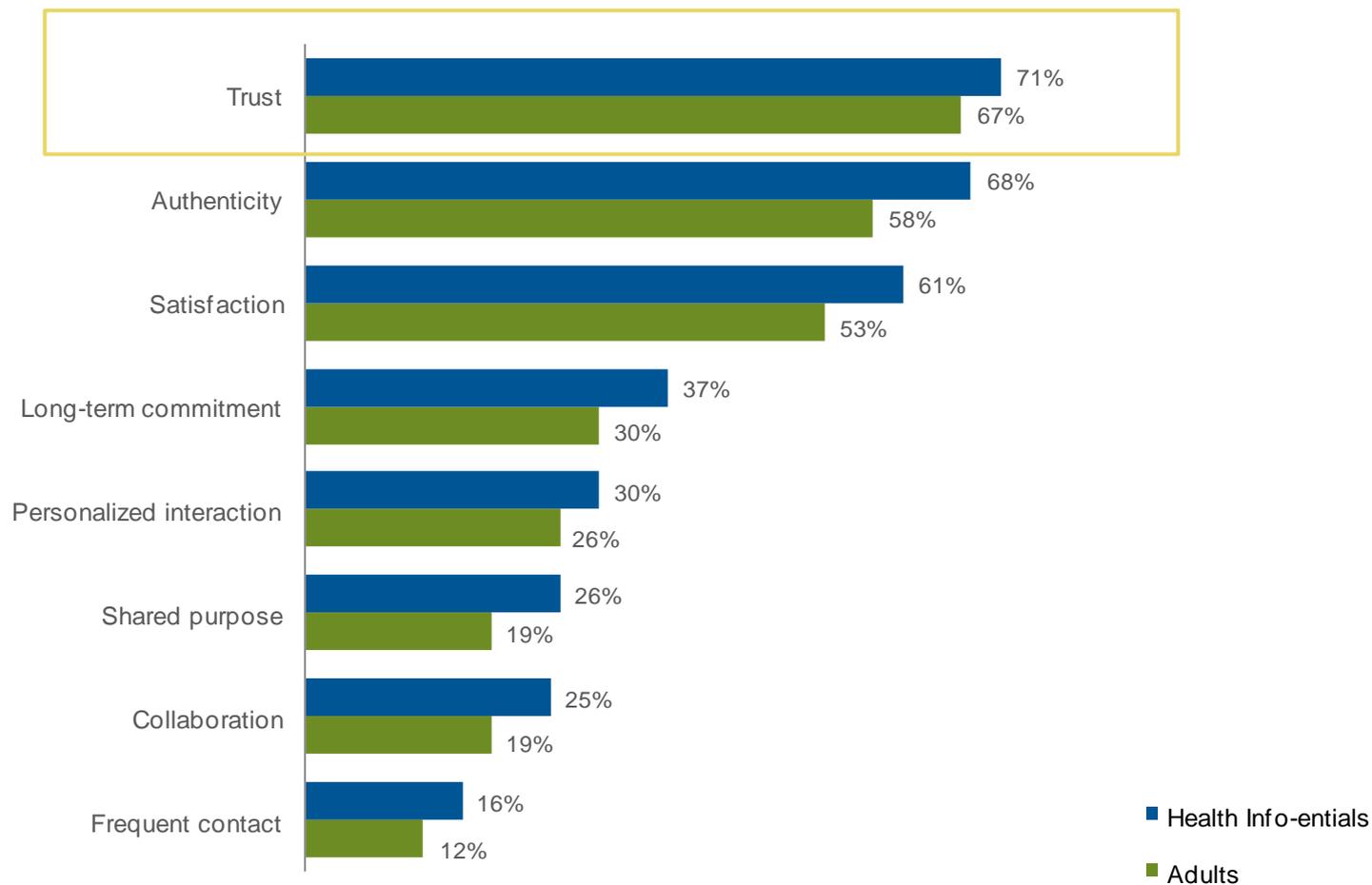


Thinking about health issues you are involved with, which, if any, of the following actions have you taken in relation to an issue? (very/somewhat)

The Trust- Health Engagement Virtuous Circle



Trust is Most Important Factor in Health Engagement



Thinking about the engagement you want to have with companies and organization involved in health, which characteristics of that engagement are most important to you?

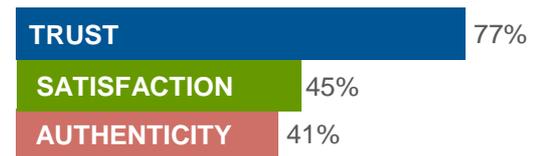
Health Info-entials in 5 Countries Want Trust, Authenticity and Satisfaction



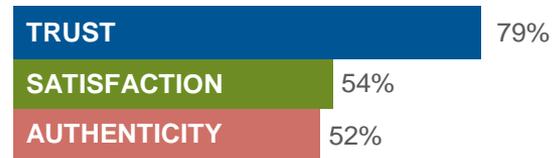
Global



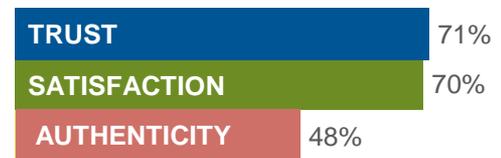
U.K.



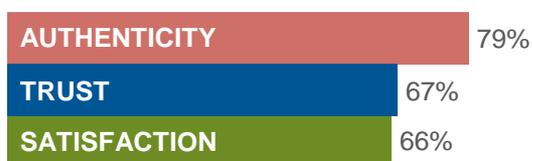
U.S.



GERMANY



CHINA



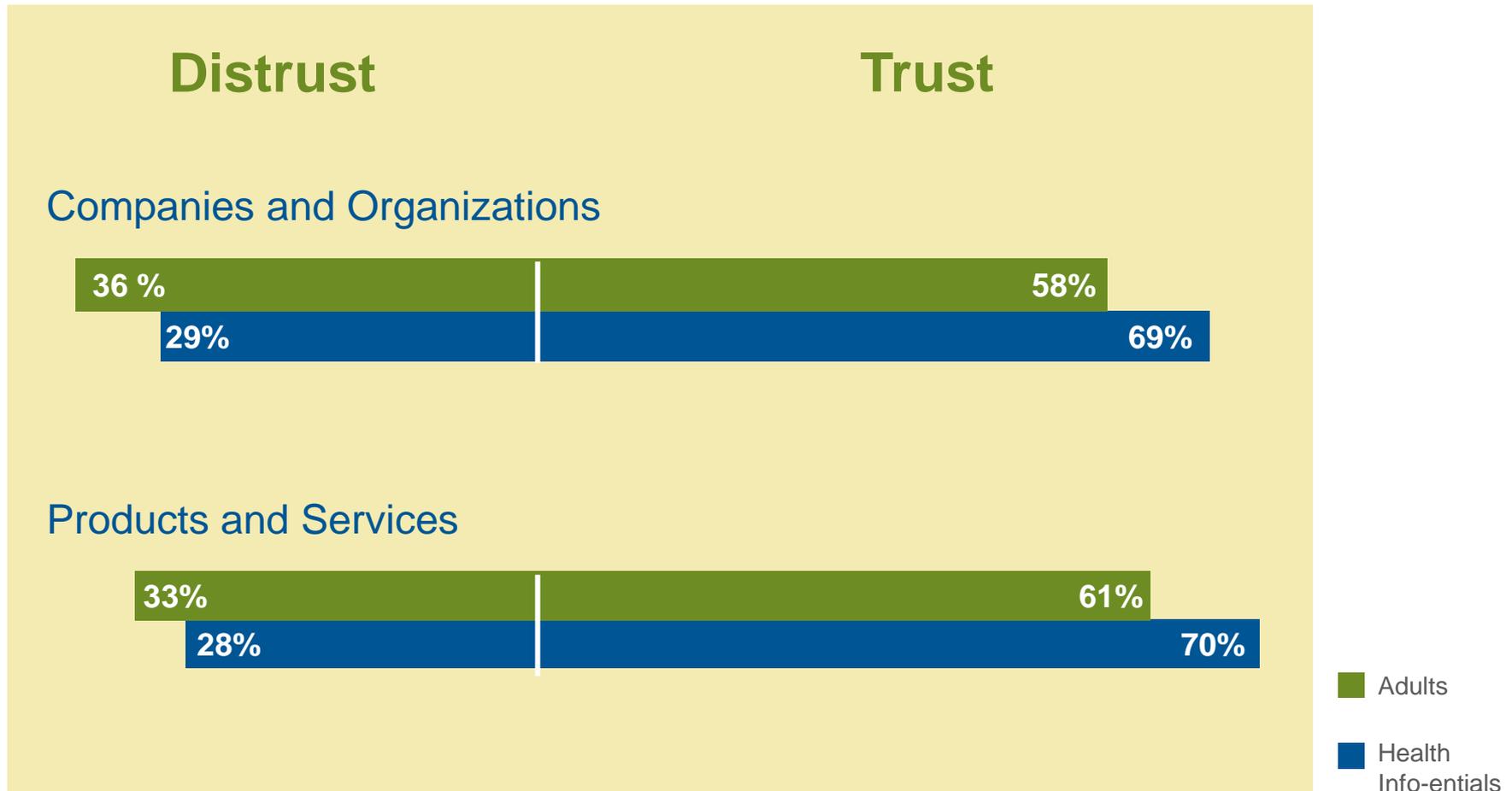
RUSSIA



Base = Health Info-entials

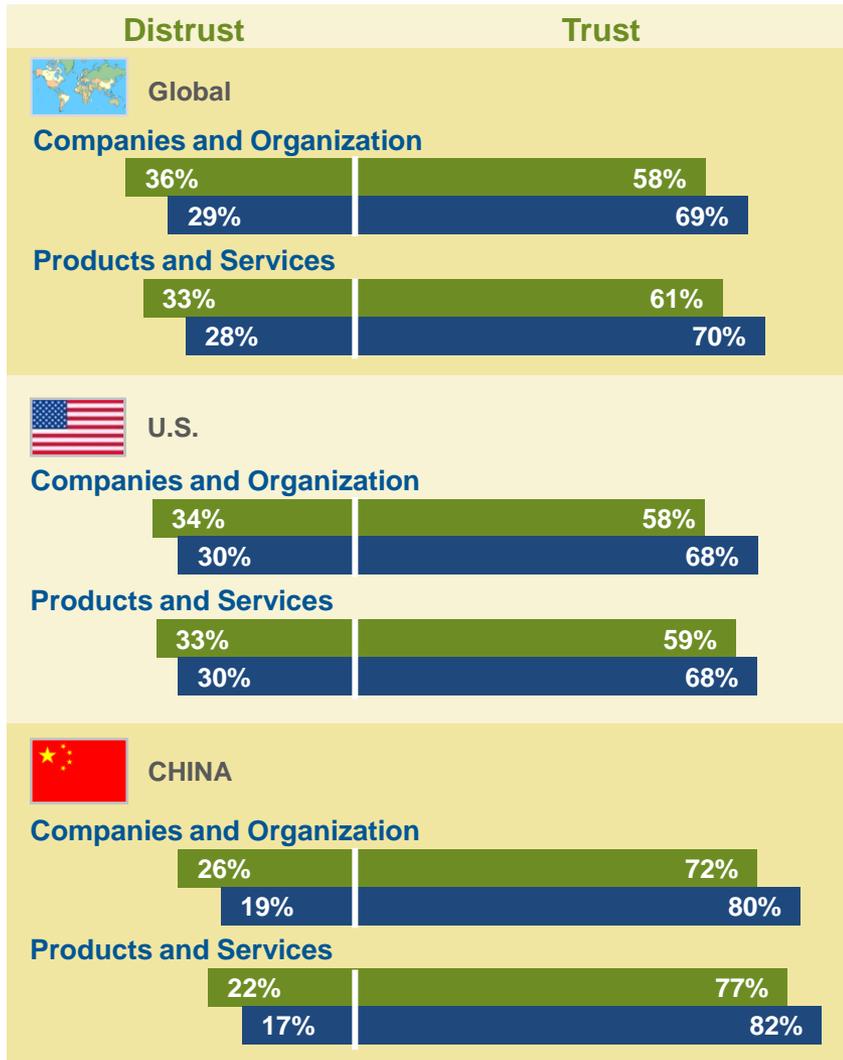
Thinking about the engagement you want to have with companies and organizations involved in health, which characteristics of that engagement are most important to you?

Health Info-entials: More Engaged and More Trusting



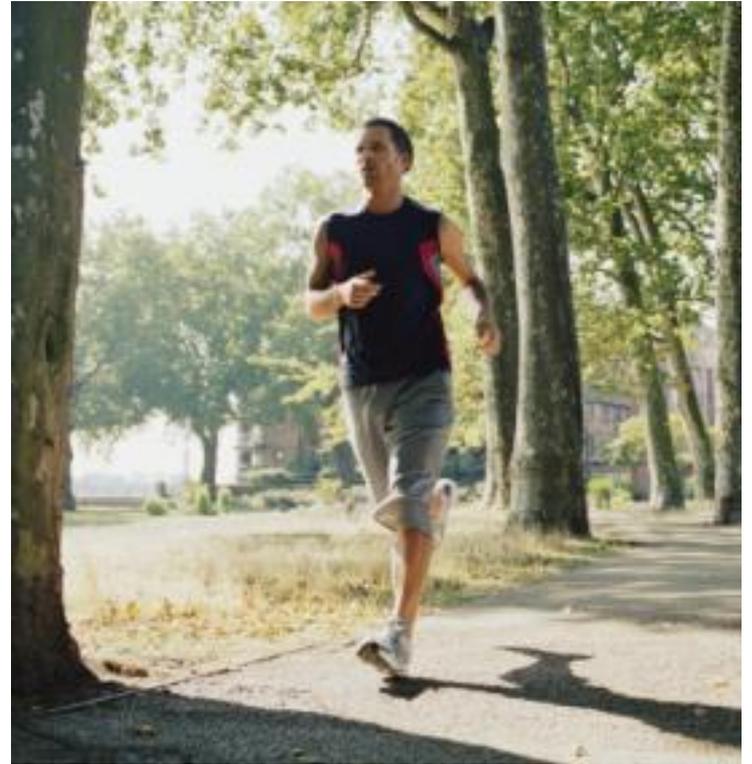
Please indicate how much you agree or disagree that you “trust what you hear from companies and organizations involved in health/...from health products and services?” (strongly/somewhat agree vs. strongly/somewhat disagree)

Health Engagement Power Consistent



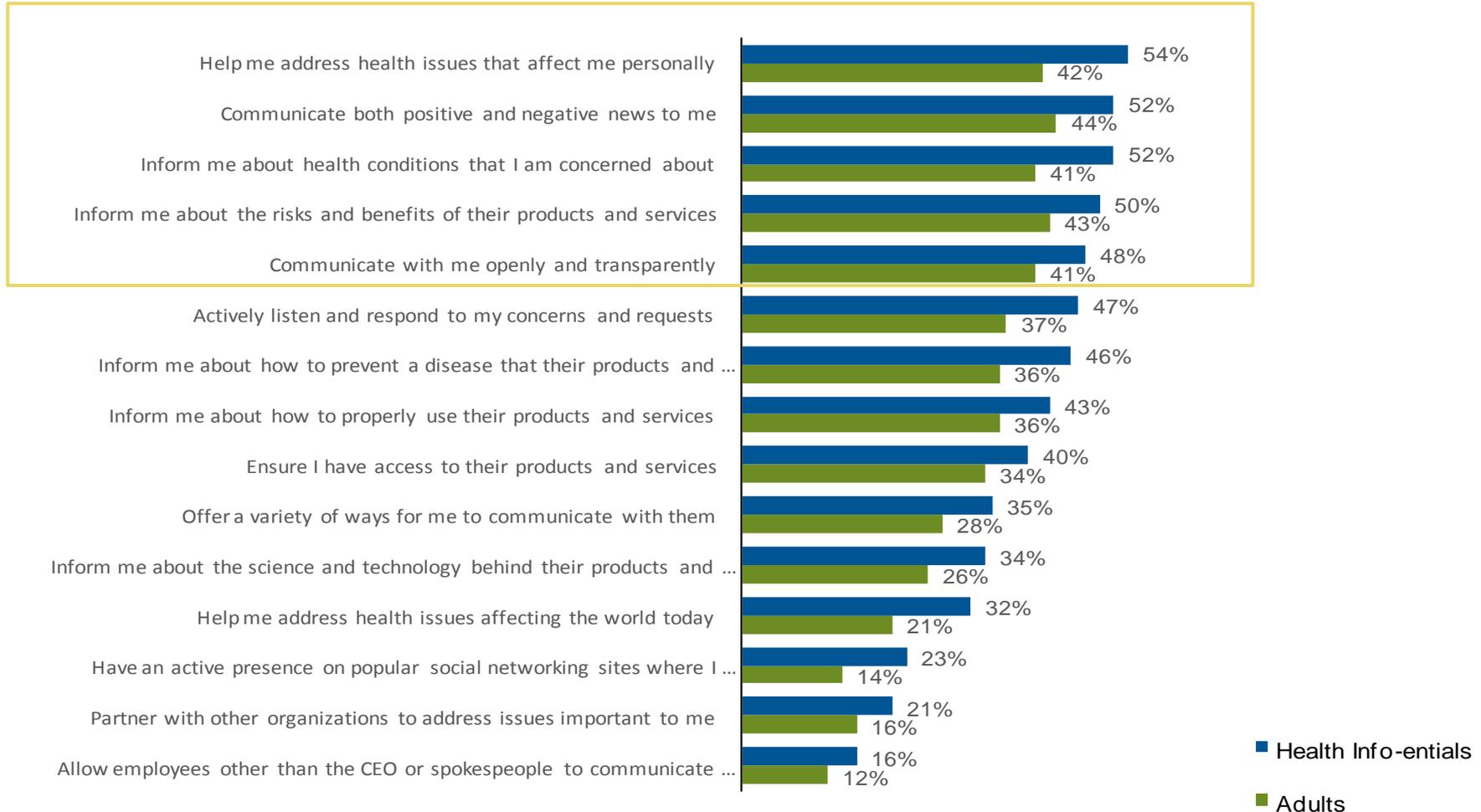
■ Adults ■ Health Info-entials

Health Engage Me: The Power of Personal



If You Want To Engage Me, Start With My Health

And Give Me the Whole Story

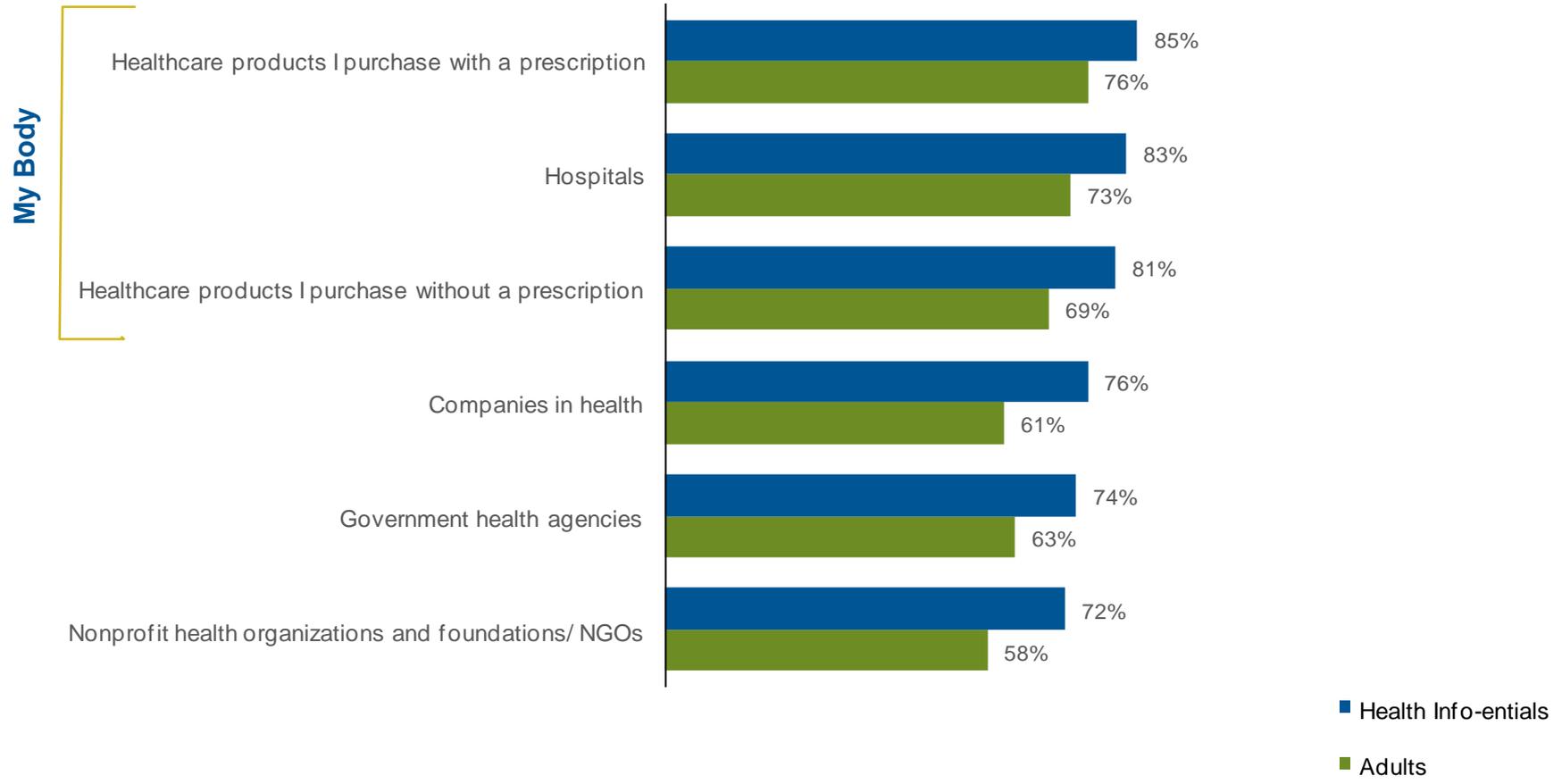


In which of the following ways do you want companies and organizations involved in health to engage with you?

* Indicates significant difference to corresponding audience

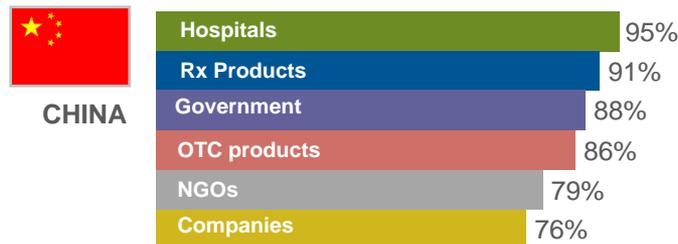
My Body Comes First

Engagement Priorities: Rx Medicines, Hospitals and Other Healthcare Products



Please rate each of the following on how engaged you want them to be with you. (very/somewhat)

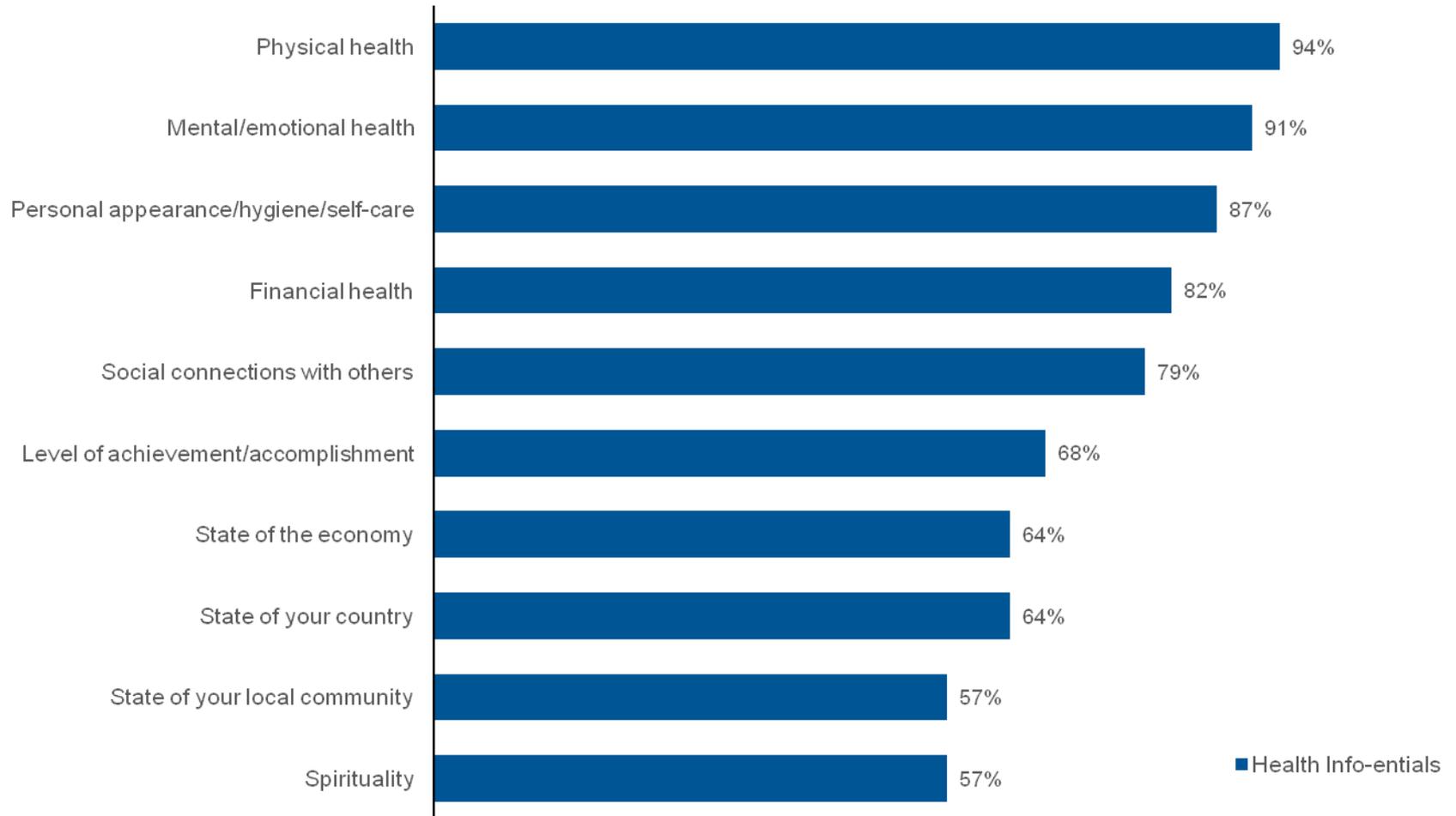
Medicines and Hospitals Top Engagement Preferences in Most Countries



Base = Health Info-entials

Please rate each of the following on how engaged you want them to be with you. (very/somewhat)

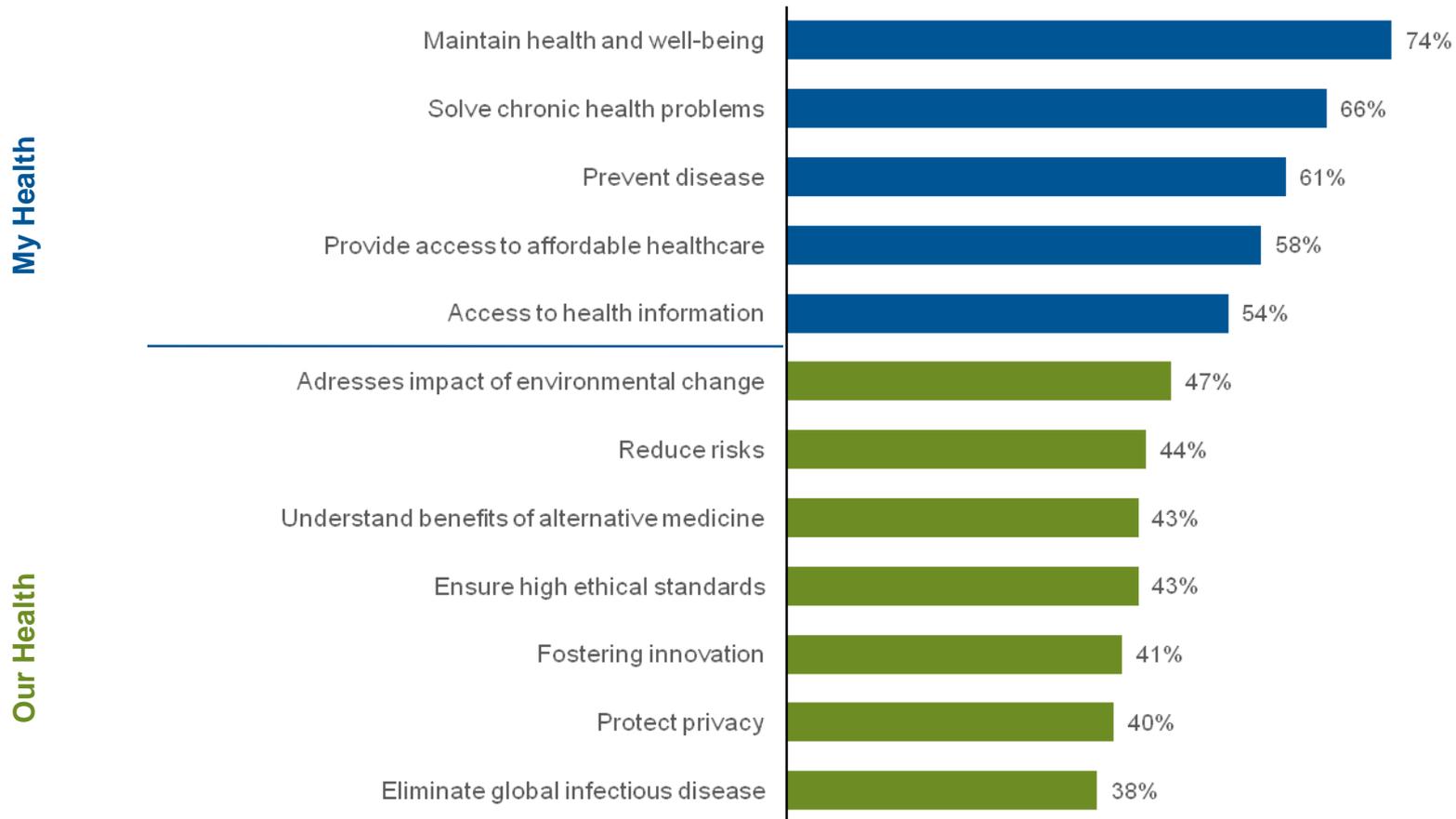
Everything Matters to My Health and Well-Being



Base = Health Info-entials

Thinking about your overall health and well-being, how important would you say each of the following factors plays in influencing it? (extremely/very important)

My Health More Important Than Our Health



Base = Health Info-entials

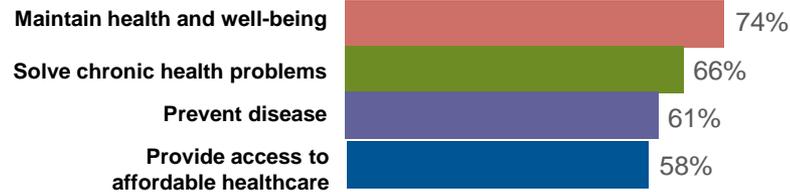
Which, if any, of the following best describes your typical engagement with the issue of ...?

(High engagement = actively seek out/share info or actively seek out/share info and advocate point of view)

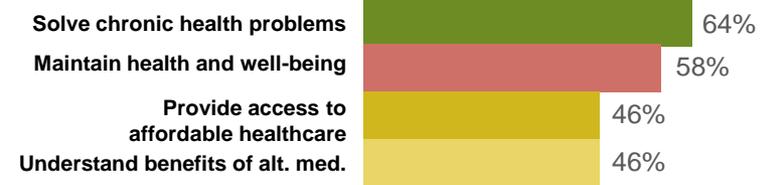
Power of Personal Health is Universal



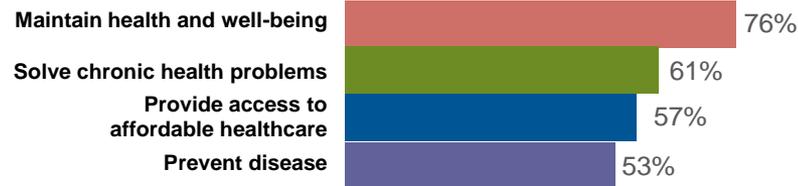
Global



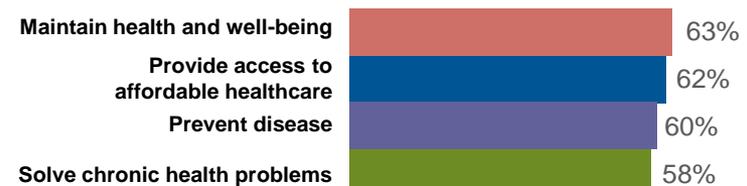
U.K.



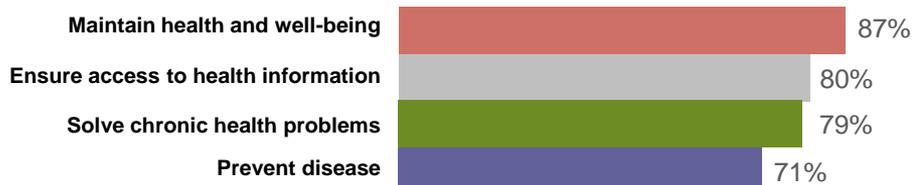
U.S.



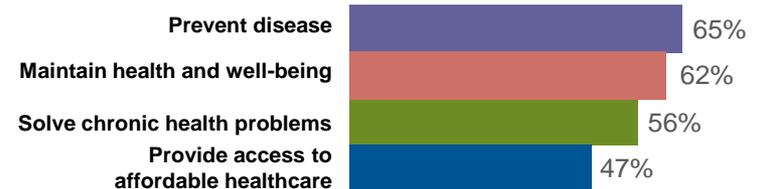
GERMANY



CHINA



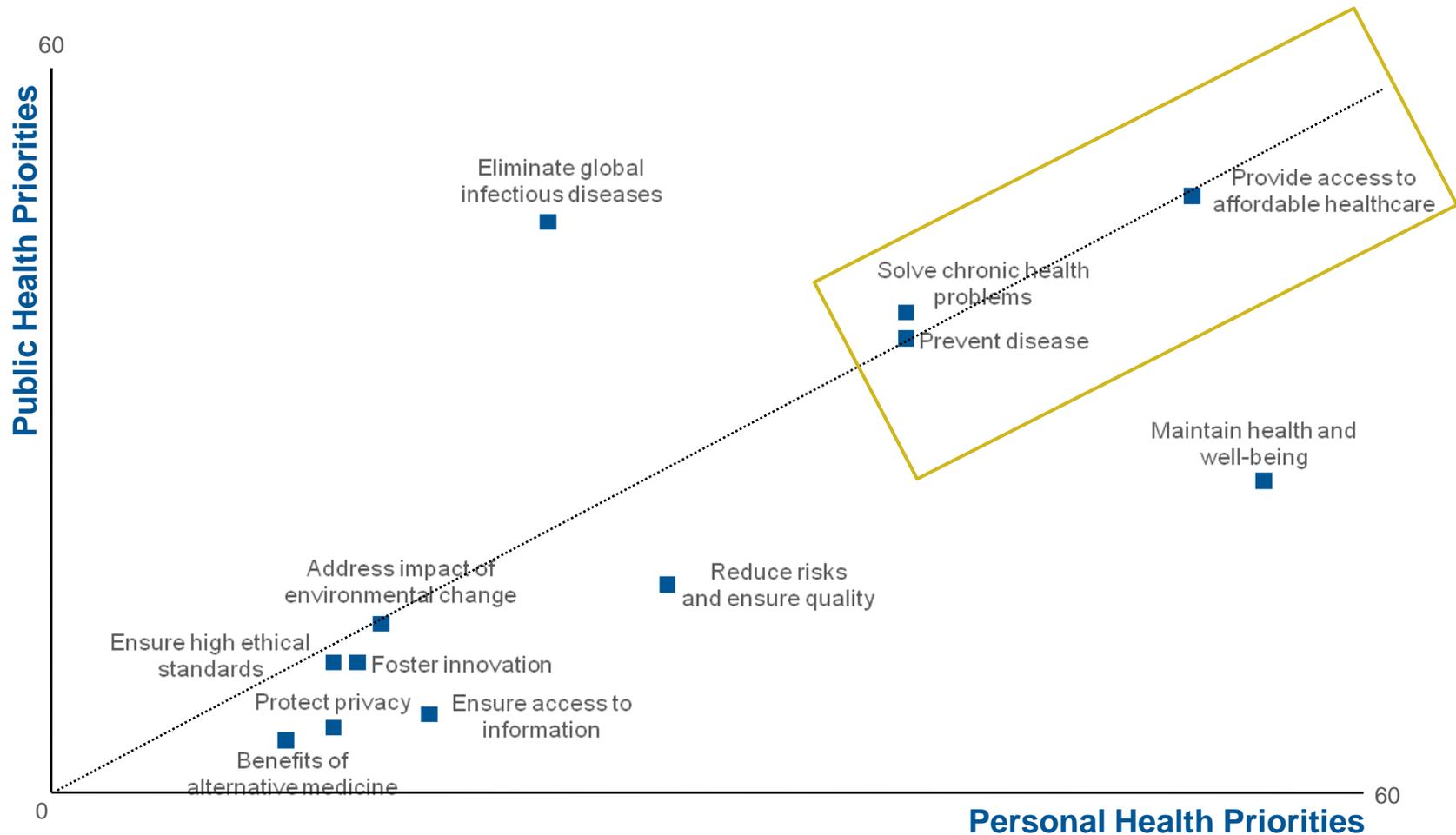
RUSSIA



Base: Health Info-entials

Which, if any, of the following best describes your typical engagement with the issue of ...? (high engagement = actively seek out/share info or actively seek out//share info and advocate point of view)

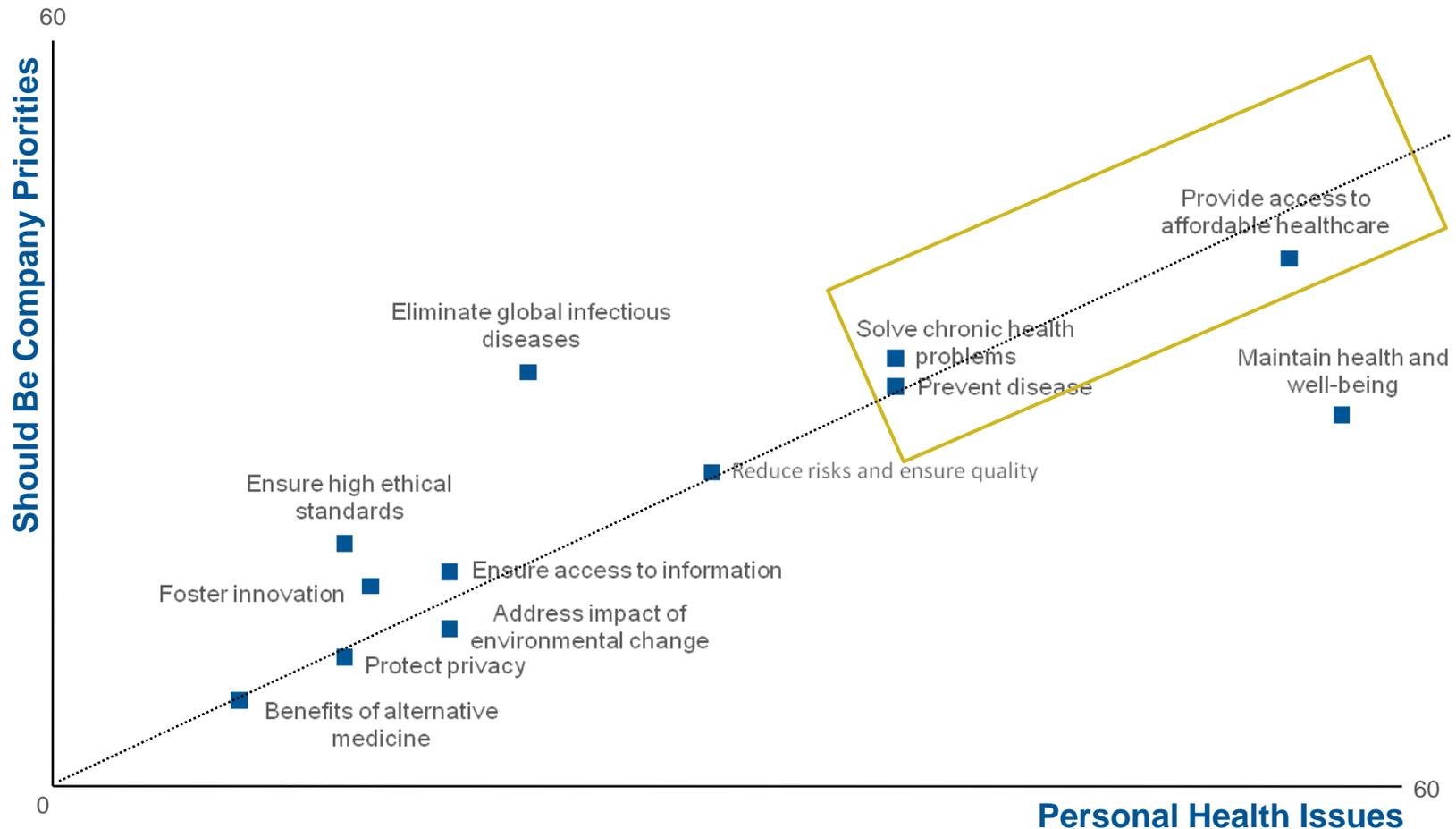
Personal and Public Health Priorities Align for Health Info-entials



Base = Health Info-entials

Thinking about these same health issues, which THREE do you believe are the highest priority health issues that need to be addressed today?
Thinking about these same health issues, which THREE would you say you are most concerned about in terms of their personal impact on you?

3 Way Alignment: Health Info-entials Want Companies and Organizations to Address Same Personal and Public Health Issues



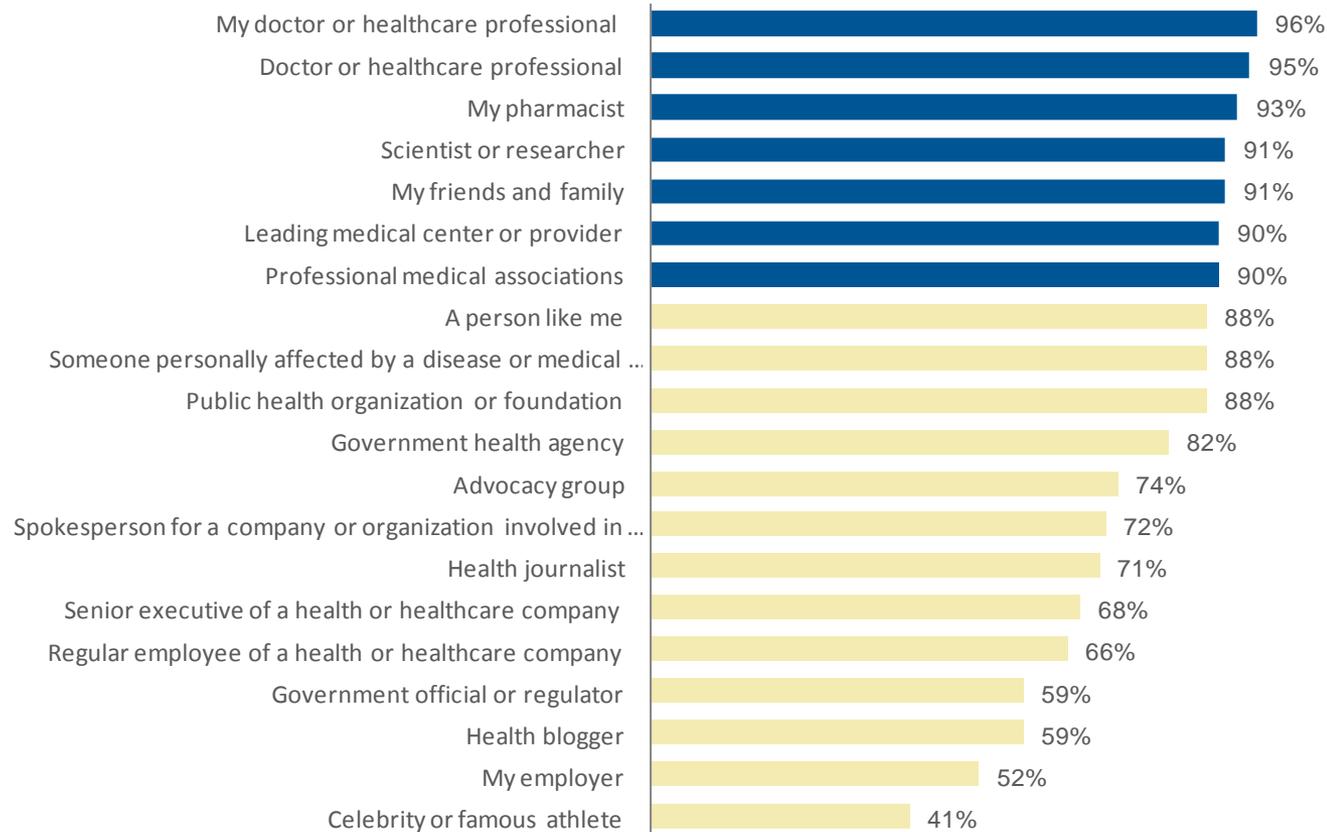
Base = Health Info-entials

Thinking about these same health issues, which THREE would you say you are most concerned about in terms of their personal impact on you?
Which THREE of the following health issues do you believe are the most important for companies and organizations involved in health to address?

Wanted: Health Expertise



Credibility Drivers: Personal Connection and Health Expertise



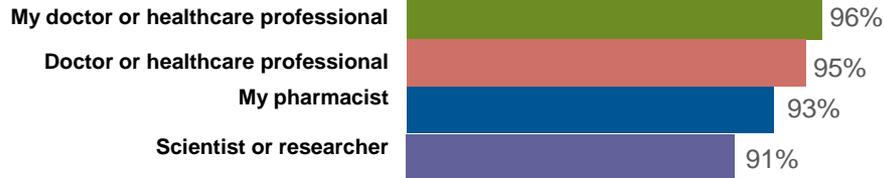
Base = Health Info-entials

If you read or heard information about a health issue from each of the following types of people and organizations, how credible would the information be? (very/somewhat)

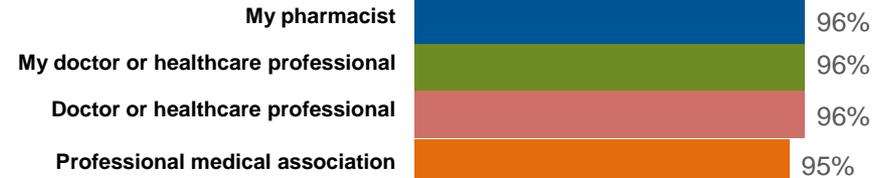
Health Expertise Drives Credibility Globally



Global



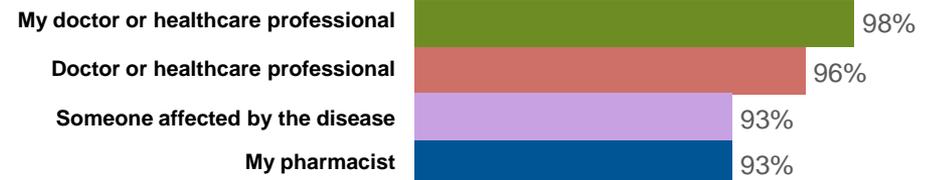
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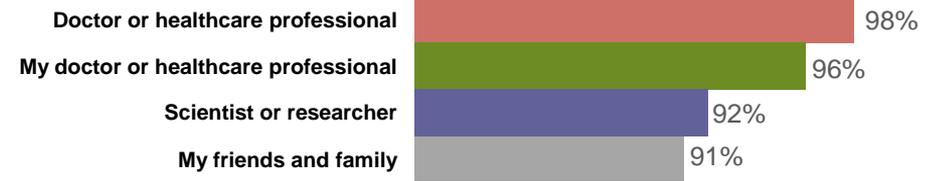
GERMANY



CHINA



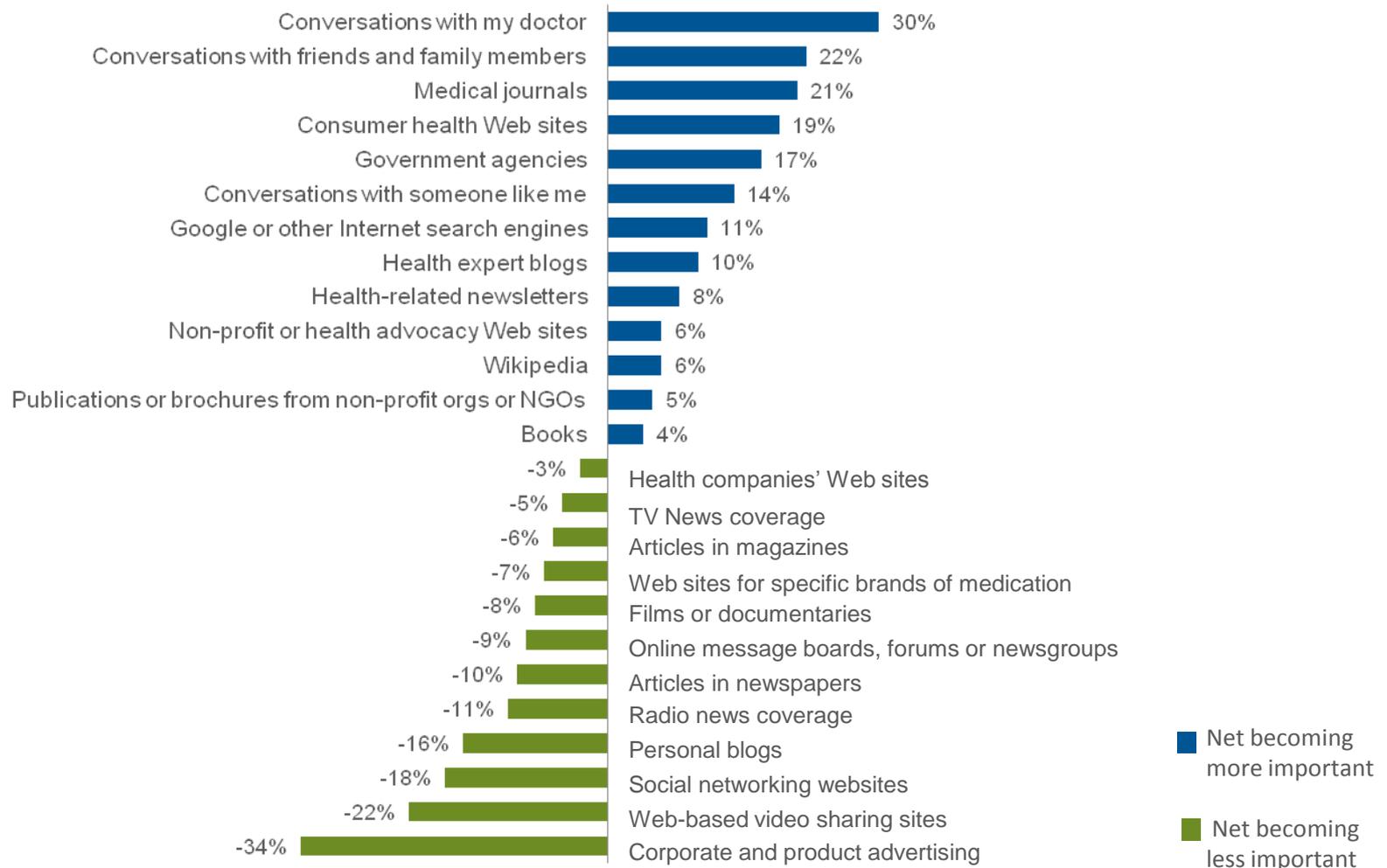
RUSSIA



Base = Health Info-entials

If you read or heard information about a health issue from each of the following types of people and organizations, how credible would the information be? (very/somewhat)

Personal and Health Expert Channels Becoming More Important



Base = Health Info-entials

For each of the following sources of health information, please indicate whether that source is becoming more important to you, less important to you, or remaining the same. (Net = becoming more important – becoming less important)

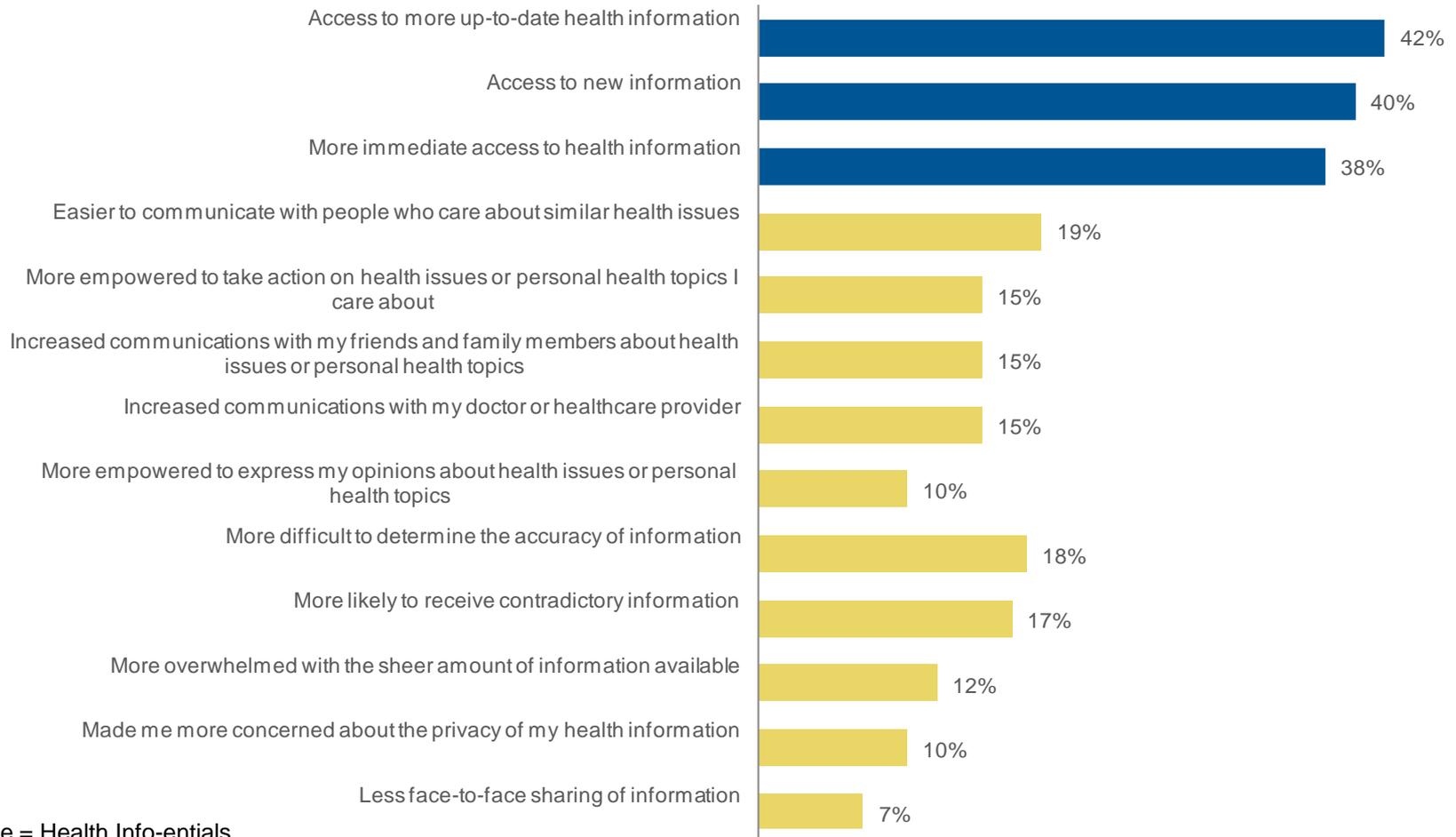
The New Second Opinion



Base = Health Info-entials

Please indicate how much you agree or disagree with each of the following statements.
(strongly/somewhat agree)

The New Health Access: Immediate Information



Base = Health Info-entials

Which, if any, are the THREE most important ways that digital communications (e.g. e-mail, the internet, mobile phones) has changed how you receive or share information about health issues?

In Search of the New Rules of Health Engagement

Health engage me

Health expertise is prime

My health and well-being come first

Interact everywhere

Engage with Health Info-entials