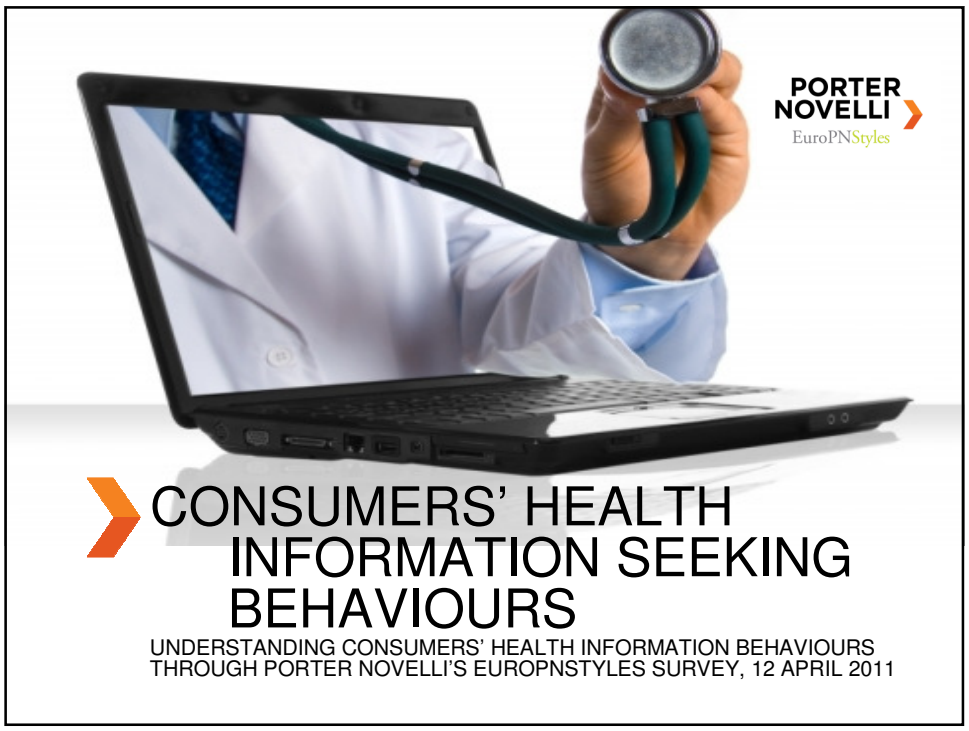
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NOVELLI
EuroPNStyles
CONSUMERS' HEALTH INFORMATION SEEKING BEHAVIOURS
UNDERSTANDING CONSUMERS' HEALTH INFORMATION BEHAVIOURS THROUGH PORTER NOVELLI'S EUROPNSTYLES SURVEY, 12 APRIL 2011

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INFORMATION CONFUSION

OUR PROPRIETARY TOOL TO DEVELOP DEEPER UNDERSTANDING OF AUDIENCES

EuroPNStyles is part of PN Styles, our communication-centered database built from an extensive consumer survey that captures the demographics, psychographics, attitudes, and behaviours of a large, nationally-representative sample of the population.

PORTER NOVELLI ConsumerStyles

PORTER NOVELLI HealthStyles

PORTER NOVELLI YouthStyles

PORTER NOVELLI DocStyles

PORTER NOVELLI EuroPNStyles

METHODOLOGY

- **Web-based survey of 10,000+ adults ages 18+ in seven countries**
  - Consumers from Synovate's Global Opinion Panel selected to match each country's demographic composition
- **Countries**: Belgium, France, Germany, Netherlands, Portugal, Spain, UK
- **Explores consumer attitudes and behaviours**
  - Brand loyalty & authenticity
  - Buying products and services
  - Food, nutrition and health
  - Technology, including digital media
  - The environment
  - Media habits
  - Corporate social responsibility

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HEALTH INFORMATION SEEKING SEGMENTATION

- Using a psycho-behavioural approach to segmentation, we measured the following:
  - It is important to me to be informed about health issues
  - I try to understand my personal health risks
  - I actively try to prevent disease and illness
  - I need to know about health issues so I can keep myself and my family healthy
  - When I read or hear something that's relevant to my health care, I bring it up with my doctor
  - I have difficulty understanding a lot of the health information that I read
  - Most health issues are too complex for me to understand
  - My doctor and I work together to manage my health
  - I rely on my doctor to tell me everything I need to know to manage my health
  - I leave it to my doctor to make the right decisions about my health

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HEALTH INFORMATION SEEKING SEGMENTATION

Independent Active (16%)

Independent Passive (21%)

Doctor Dependent Active (29%)

Doctor Dependent Passive (35%)

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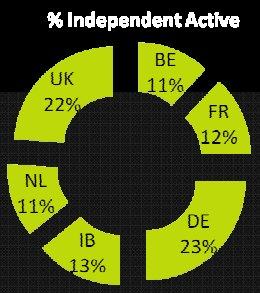
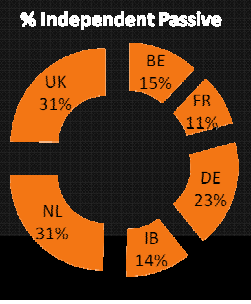
Clusters by Country

- Independent Actives
  - Germany and the UK have the highest percentage of Independent Actives



- Independent Passives
  - The UK and Netherlands have the highest percentage of Independent Passives, followed by Germany



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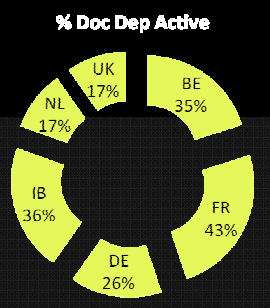
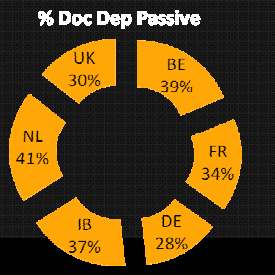
Clusters by Country

- Doctor Dependent Actives
  - With 1 in 4, France has the highest percentage of Doc Dependent Actives
  - Belgium and Iberia also have high percentages of this cluster



- Doctor Dependent Passives
  - The Netherlands has the highest percentage of Doc Dependent Passives, with Belgium and Iberia close behind



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HEALTH INFORMATION SOURCES

	TOTAL	INDEPENDENT ACTIVE	DOCTOR DEPENDENT ACTIVE	DOCTOR DEPENDENT PASSIVE	INDEPENDENT PASSIVE
Internet	70%	85%	72%	61%	73%
Your Doctor	51%	54%	75%	47%	21%
Television	30%	34%	33%	25%	29%
Magazines	28%	39%	32%	21%	25%
Your pharmacist	26%	33%	36%	22%	15%
Your family	22%	24%	23%	20%	22%
Newspapers	22%	28%	24%	18%	20%
Your friends	19%	23%	18%	16%	21%
Radio	9%	11%	11%	7%	8%
Dietician/nutritionist	7%	9%	11%	55	4%
Government source	7%	12%	8%	5%	6%

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HEALTH INFORMATION SOURCES

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HEALTH INFORMATION SOURCES

Consumers' reliance on TV and magazines has dropped significantly since 2008

	TOTAL	INDEP AC		DOCTOR DEPENDENT PASSIVE	INDEPENDENT PASSIVE
Internet	70%	8		61%	73%
Your Doctor	51%	5		47%	21%
Television	30%	34		25%	29%
Magazines	28%	39%	32%	21%	25%
Your pharmacist	26%	33%	36%	22%	15%
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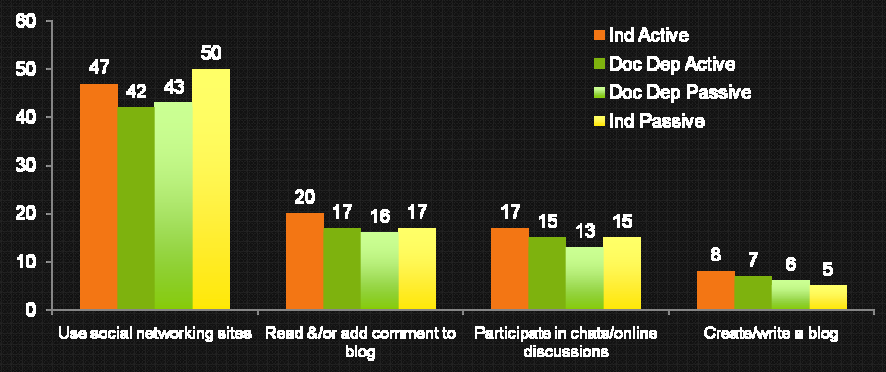
Social Web Use by Cluster



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WHAT DOES THIS MEAN FOR YOUR PROGRAM?

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THANK YOU!

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