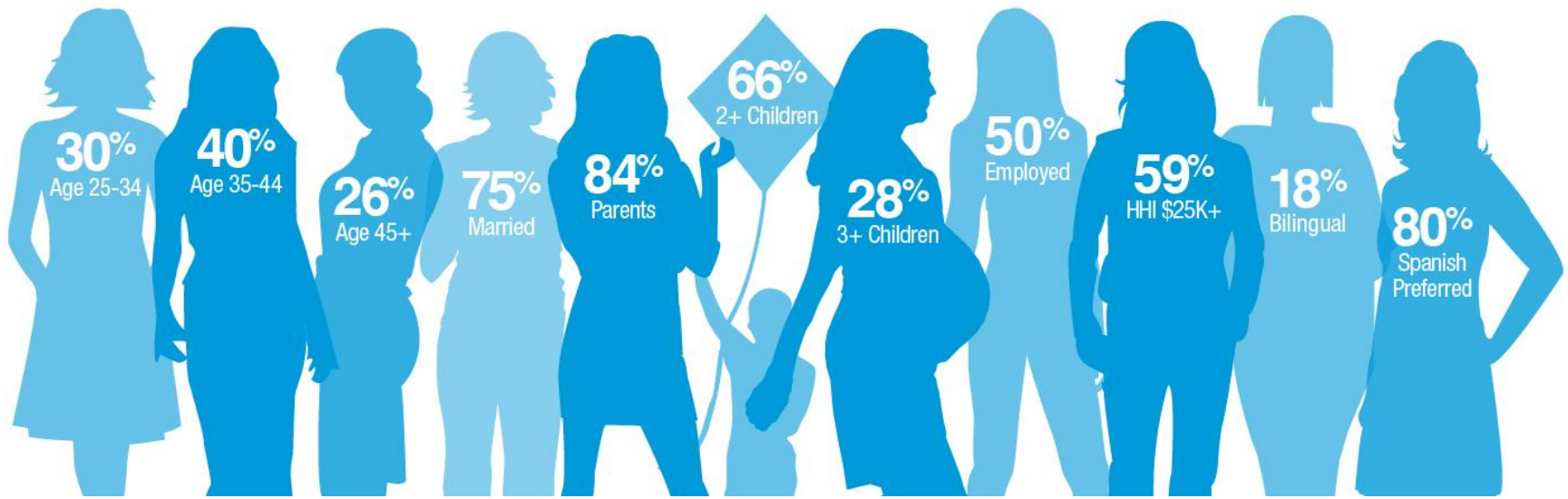




PHARMACEUTICAL TREND REPORT  
APRIL 2014

# Methodology

- Meredith Hispanic Ventures tapped into its “**Entre Nosotras**” (“Between Us”) database, made up of over 7,000 of our most loyal and influential subscribers, to examine their current auto ownership, attitudes, usage and purchase intention. A total of **526 respondents** completed an online survey with a **89%** completion rate.
- Online survey responses were received from **January 16 to February 5 2014**.
- Demographics:

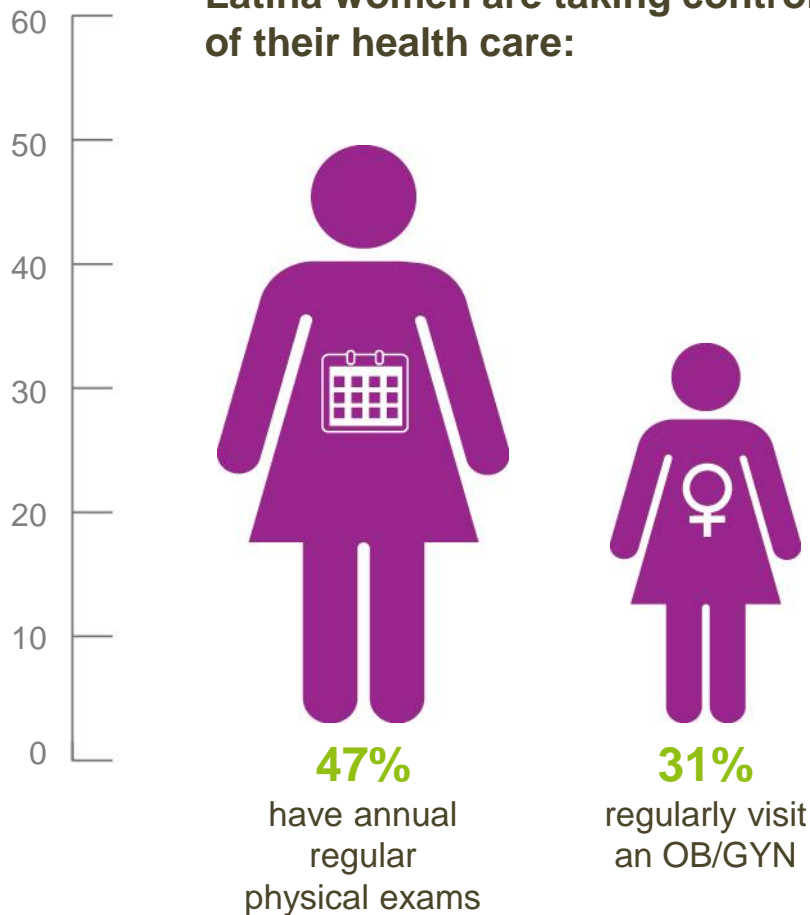


# WELLNESS & PREVENTIVE CARE

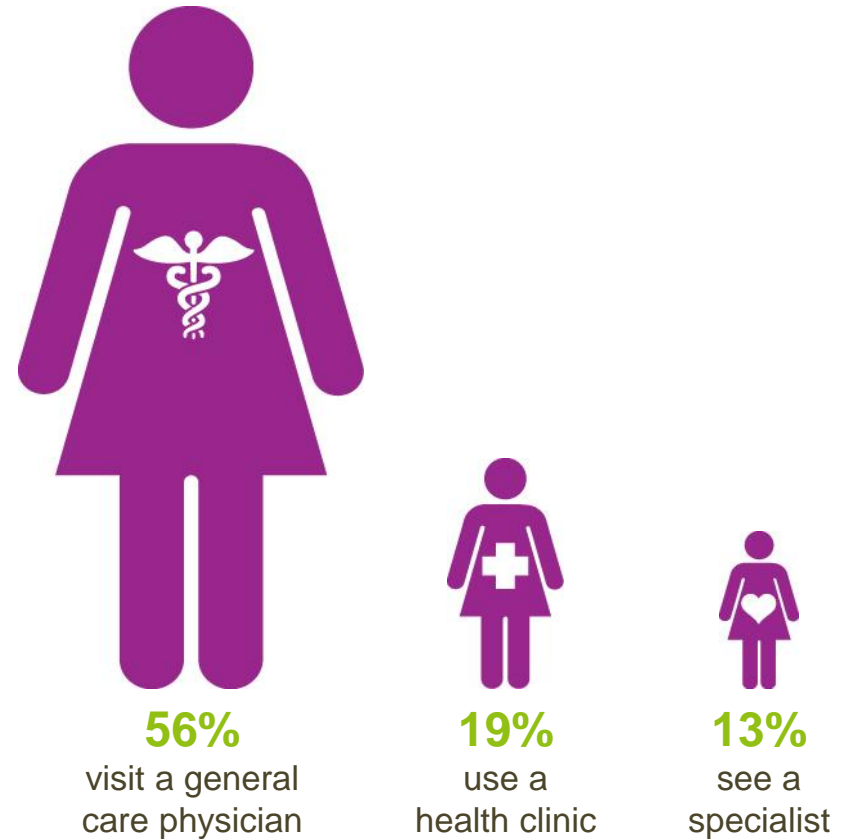


# A Focus on Preventive Care

Latina women are taking control of their health care:



Visiting the following medical care choices:



Source: Entre Nosotros Pharmaceutical Trend Report March 2014

Q 1: For which of the following preventive reasons do you regularly go to the doctor? (check all that apply). Q 2: When seeking medical attention, where do you generally go first? (check only one).

# Health & Wellness is a Top Priority



**74%** agree that vitamin supplements improve your health



**55%** exercise or walk on a regular basis for healthful benefits

- **14%** are engaged in a formal exercise regimen



**52%** regularly make healthy food choices by checking food labels for fat, sugar or calorie content



Stress is a factor for Latinas also, but there is more of a balance

- **58%** say they are somewhat/very stressed – **14%** indicated they are very stressed
- **40%** say their stress level is less than it was a year ago – **1 in 3** indicate that they have little stress



Nearly **60%** almost always/always use sunscreen on themselves/their children

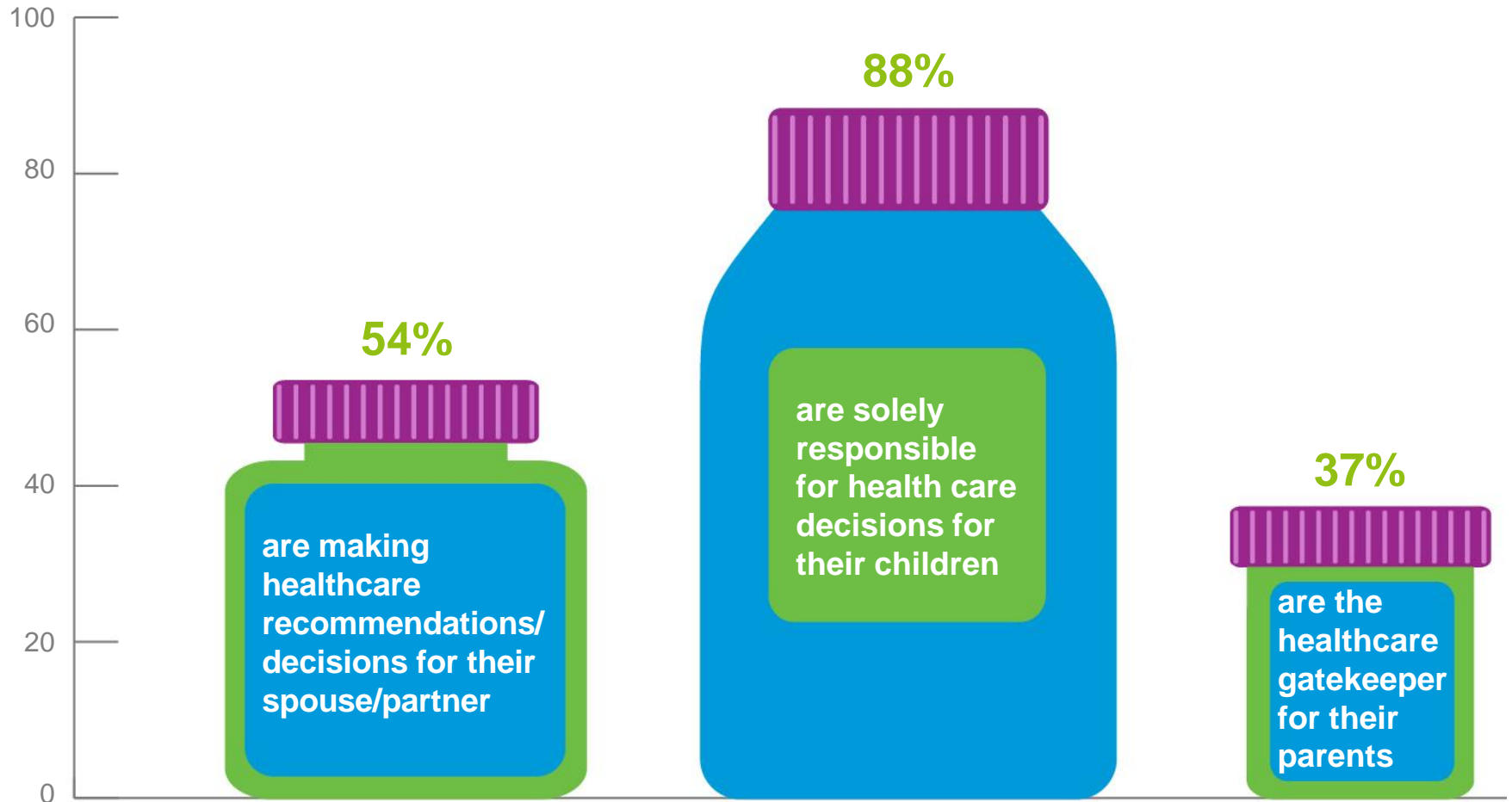
- **65%** indicate they use sunscreen primarily to prevent skin cancer

Source: Entre Nosotros Pharmaceutical Trend Report March 2014 Q 12. Indicate your level of agreement to the following health attitude statements. Agree is defined as completely/somewhat. Q 14. Which of the following steps have you taken to try to prevent health problems? (check all that apply). Q 15. What is your current level of stress? Q 16. How does your stress level compare to a year ago? Q 17. How often do you apply sunscreen to yourself/your children when in the sun? Q 18. What is the most important benefit you perceive for using sunscreen?

# HEALTHCARE GATEKEEPER



# Making Family Health Care Decisions



Source: Entre Nostras Pharmaceutical Trend Study March 2014  
Q 3. Who in your household usually makes the decisions on when to go to the doctor and what medicines to take?

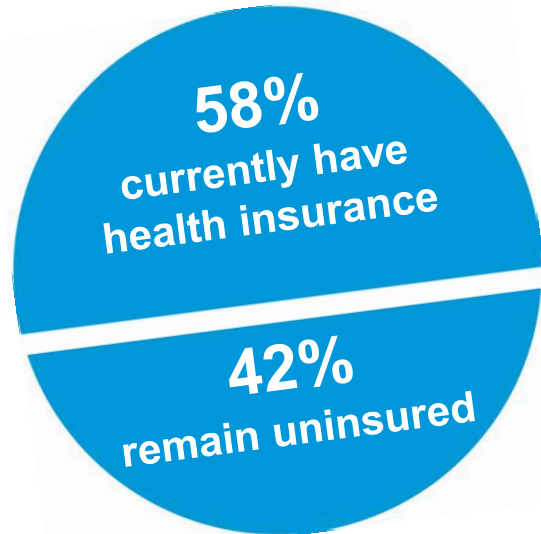
# HEALTH INSURANCE



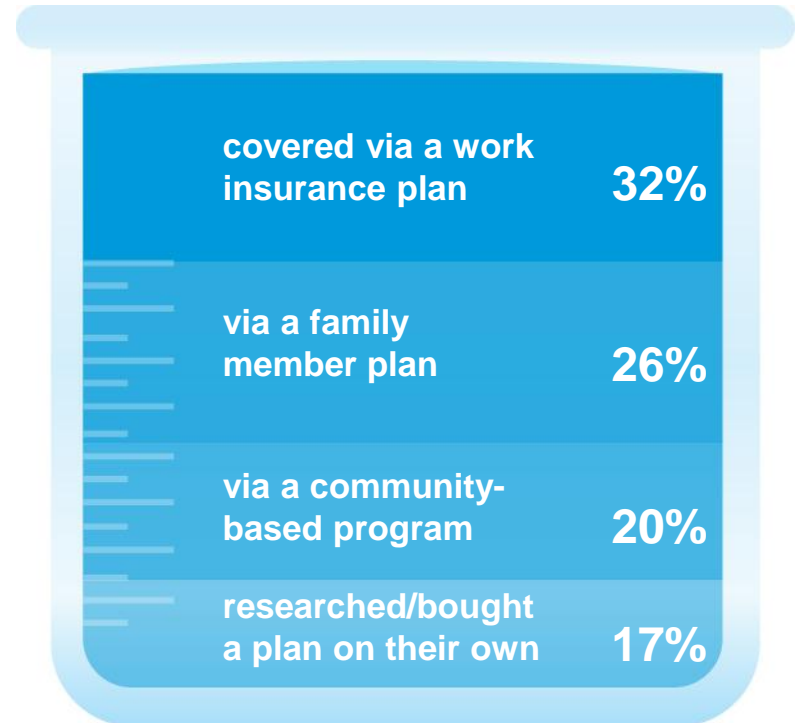


# Insured or Not?

For Latinas, the balance between insured vs. non-insured is tipping, but there is still a long way to go...



Of those who have health insurance...



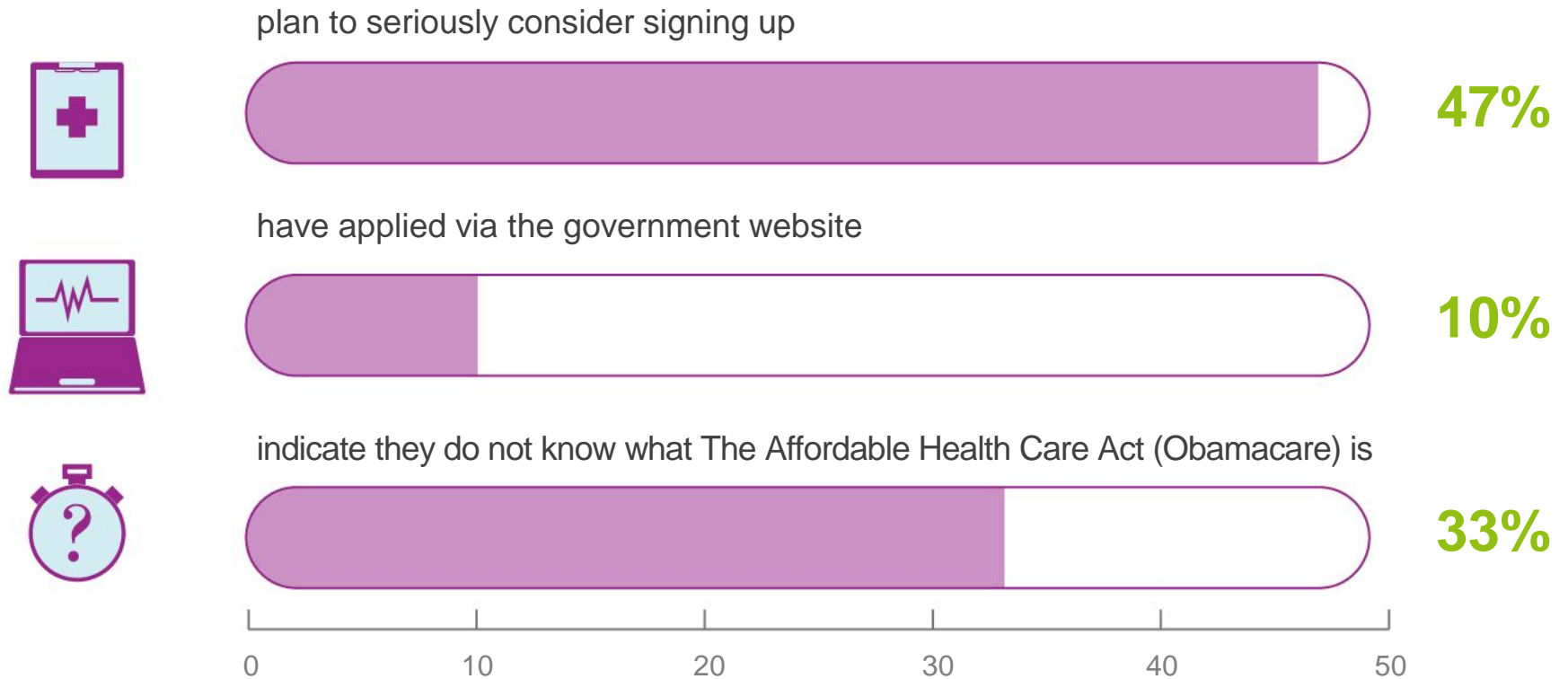
For those without insurance, the #1 reason, by far, is a lack of affordability (66%)

Source: Enter Nostras Pharmaceutical Trend Study March 2014

Q 4. Do you currently have health insurance? Q 5. How did you obtain your health insurance? Q 6. What is the main reason you do not have health insurance? (check only one).

# The Affordable Health Care Act

Reaction to The Affordable Health Care Act is largely positive, yet consumer education is still needed.



Source: Entre Nostras Pharmaceutical Trend Study March 2014

Q 7. Which best describes your thoughts/actions regarding The Affordable Health Care Act (Obamacare)? (choose only one).

# AILMENTS & REMEDIES



# Ailments & Remedies

Of the 21 listed ailments/conditions in the survey, **84%** indicated they suffer from at least one.

The following ailments were cited by at least **10%** of respondents:

Rx AILMENT	% SUFFER	PERCENTAGE USING REMEDIES		
		OTC REMEDY	PRESCRIPTION REMEDY	NEITHER
Headaches/Migraines	23	44	12	43
Acid Reflux	22	29	16	52
Allergies	19	33	19	46
Muscle Aches	18	26	10	59
Obesity	18	14	4	73
Constipation	14	25	7	64
Anxiety/Depression	10	4	12	81
High Cholesterol	10	3	12	82

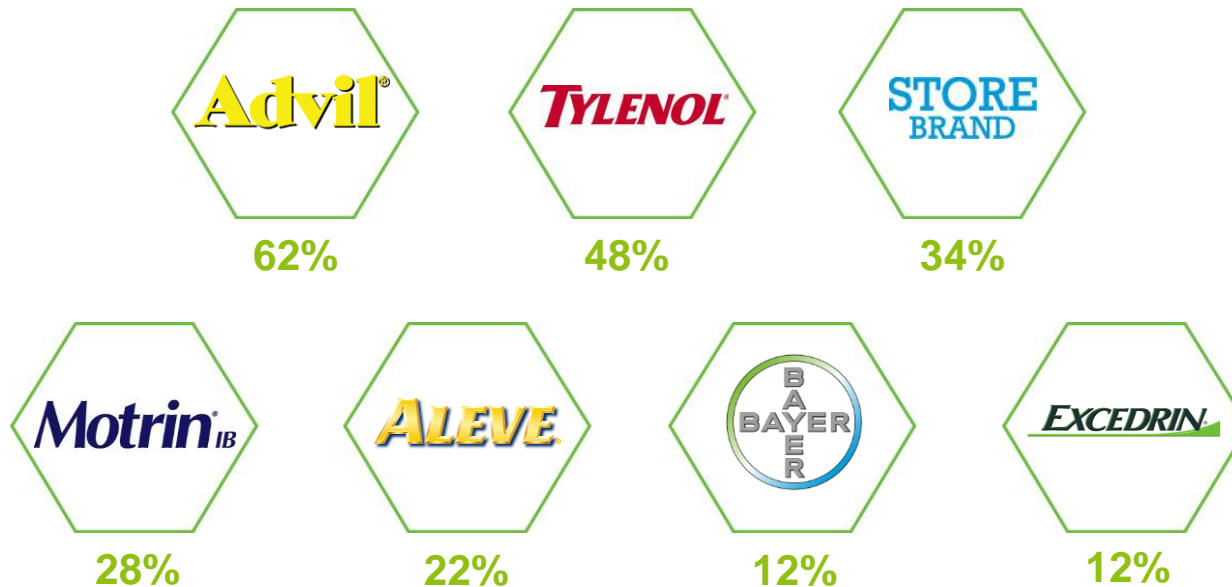
A significant percentage do not take any remedies to treat their ailments.

Source: Entre Nosotras Pharmaceutical Trend Study March 2014 Q 8. Which of the following ailments listed below do you suffer from and what type of remedies, if any, have you taken? (check all that apply).

# OTC Purchasing

Latinas are purchasing OTC remedies – **58%** at a drug store chain;  
**36%** at a mass merchandiser

*Pain remedies most often purchased:*



Over **60%** most often buy name brand OTC remedies

Nearly **40%** agree they are willing to pay more for brand name OTC drug.

Source: Entre Nosotras Pharmaceutical Trend Study March 2014 Q 9. Which of the following pain reliever brands have you purchased for yourself over the past 12 months? (check all that apply). Q 10. Where do you most often buy your OTC/non-prescription remedies? (choose only one). Q 11. When buying OTC/non-prescription pain relievers for yourself or family member, which type brand do you most often buy? (choose only one) Q 12. Indicate your level of agreement or disagreement with the following health care statements. Agree is defined as somewhat/completely.

# Explain it in **Their Language**

**PHARMACY LA FARMACIA**

**73%** indicate it is very important that their pharmacy includes bilingual pharmacists and signs<sup>1</sup>


Source: 1. Entre Nosotros Pharmaceutical Trend Report, March 2014. Q 13. How important is it for you to have a bilingual pharmacist/signs in the pharmacy section of the store you frequent?

# CHILDREN'S HEALTH CARE



# Children's Ailments & Remedies

Of the five listed ailments/conditions, **62%** indicated their children suffered from at least one. The following ailments were cited by at least **10%**:

 AILMENT	% SUFFER	OTC REMEDY	PRESCRIPTION REMEDY
ADD/ADHD	10%	—	74%
Allergies/Cold	62%	56%	54%
Anxiety/Depression	10%	—	72%
Asthma	16%	17%	87%
Fever	49%	67%	—

Source: Entre Nosotras Pharmaceutical Trend Report March 2014. Q 19. Of the following ailments/conditions your children suffer from, which type of remedy have you used in the past 12 months? (check all that apply).



# Children's OTC Remedies

Concerned with their children's health & well being, Latinas are purchasing over the counter remedies.



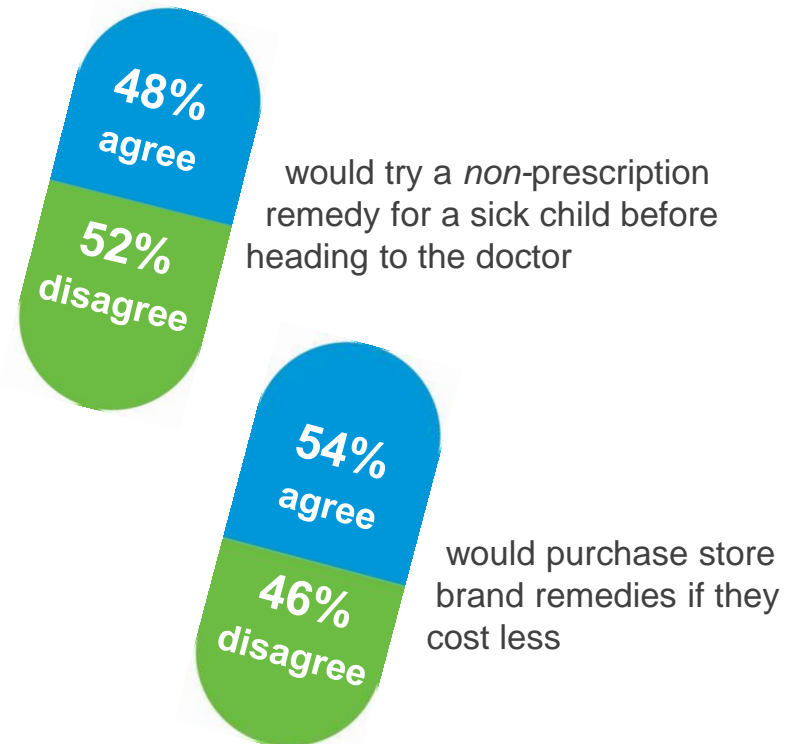
Source: Entre Nosotras Pharmaceutical Trend Report March 2014; Q 20. Which of the following children's fever/pain relief brands have you purchased in the last 12 months? (check all that apply).

# Children's Health Care Attitudes

## Latinas take care when it comes to their children's health



## Nearly evenly split on some decisions...



Source: Entre Nosotras Pharmaceutical Trend Report March 2014; Q 21. Please indicate your level of agreement to the following statements regarding your children. Agree is defined as somewhat/completely.








# HEALTH CARE & TECHNOLOGY



# Managing Health Care via Technology

**Outpacing Caucasian, savvy Latina consumers rely on technology and are interested in new tech options to manage their health care**

*Latinas are more likely to use or be interested in...*

	<b>Index</b> (vs. Caucasians)
 Mobile health app to manage personal health information/records	210
 Tailored text messages about health care information	200
 Online chat system with Dr/PCP/Pharmacist	189
 Social media chat or health group	188
 Health care tracking device or diary	164
 Mobile app to track health	150
 Health screening kiosks at retail	126

Source: Mintel Group, Ltd. Pharmaceuticals: The US Consumer, January 2014

# HEALTH CARE & THE MEDIA

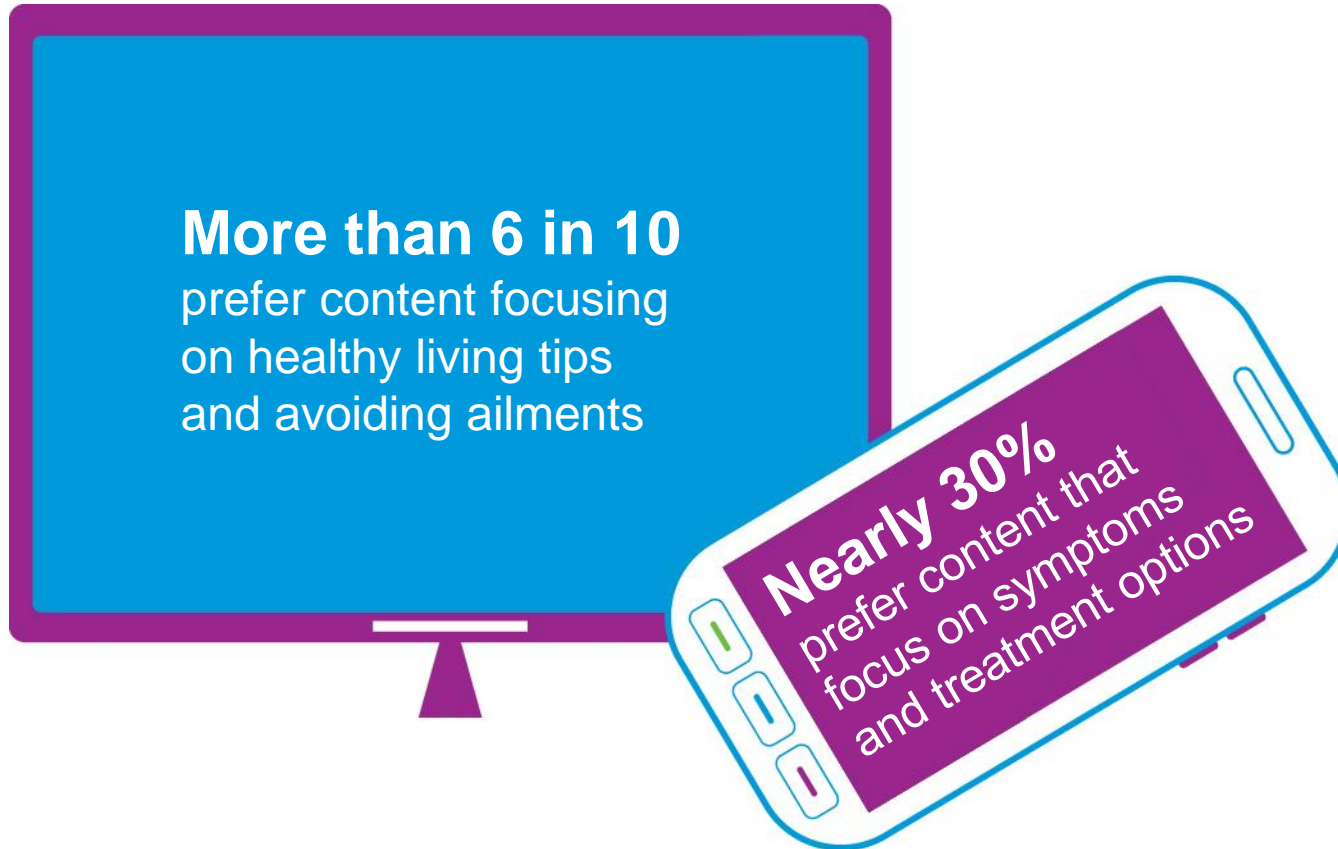


# The Media & Information



Source: Entre Nosotras Pharmaceutical Trend Report March 2014. Q 25. Which of the following websites have you visited in the past 12 months to learn about medical/health care (check all that apply).

# The Media & Information



Source: Q 26. What type of health article/content is most relevant to you? (check only one).

# Advertising Inspires Action

## Latinas take action after exposure to health care advertising



**53%**

asked a doctor  
about specific  
products



**45%**

visited a product  
website



**30%**

mentioned  
the ad to  
family/friends



**21%**

purchased  
OTC *non-*  
prescription  
products



**15%**

asked  
their doctor  
for a  
prescription  
sample

Source: Entre Nosotras Pharmaceutical Trend Report March 2014; Q 22. Which of the following actions have you taken after seeing a health care ad? (check all that apply).



# How to connect with her



## Educate her – on costs

Over **40%** still don't have health insurance, with **2 in 3** citing price. Explain the potential cost of NOT being insured.



## Educate her – on the benefits of remedies

For many common ailments, the majority suffer in silence, taking neither prescription or OTC relief.



## Provide in-language support

With so many health insurance and health remedy options; in-language ads, brochures, pharmacy personnel and signage can dramatically increase her comfort level and willingness to act.



## Understand her gatekeeper role

She is clearly the healthcare decision maker for the **ENTIRE** family, from children to elderly parents. Tailor your pitch accordingly.



## Capitalize on her concerns

The majority prefer brand name OTC drugs and are willing to pay more for it, particularly for her children's health needs.



## Focus on healthy living

She engages more in campaigns promoting wellness rather than those dealing with serious issues.