



Unlocking Consumer Insights for Healthcare Marketing Success

— 2023



Gone are the days of patients seeking authoritarian providers. Today's consumers seek collaborative healthcare partnerships that put them at the center. Your marketing should mirror that new paradigm.

Embracing the Power Shift

Consumers today have more power than ever in nearly every facet of life. This shift is especially pronounced when it comes to their health, and it represents a significant evolution in how they choose healthcare services, providers and institutions. Consumers are more empowered, informed and engaged in their healthcare today, and their expectations of a consumer-centric experience drive their choices. **Simply put, they control their healthcare decisions, and not leveraging that fact can limit your brand's growth.**

At ChappellRoberts, we believe healthcare marketing should be built around your consumers, and that starts with gaining a deep and nuanced understanding of them—not just who they are on the surface, but also their values, psychographics, decision-making processes and media consumption.



Uncovering a Historically Elusive Audience

Everyone is a potential healthcare consumer, but health decision makers are often an opportune audience for marketing. They make decisions for themselves as well as loved ones, and they typically control the purse strings when it comes to health spending. Nationwide, this audience is about 35 million strong, and there are some unique and targetable factors that unite them.

Targeting this audience can drive stronger returns on marketing investment as a result of the influence they wield.





**So who are these healthcare
decision makers?**



Gender

Healthcare decision makers are significantly more likely to be women. A significant threat healthcare marketers face is a failure to develop a nuanced understanding of—and a commitment to—women as the primary healthcare consumers and decision makers.

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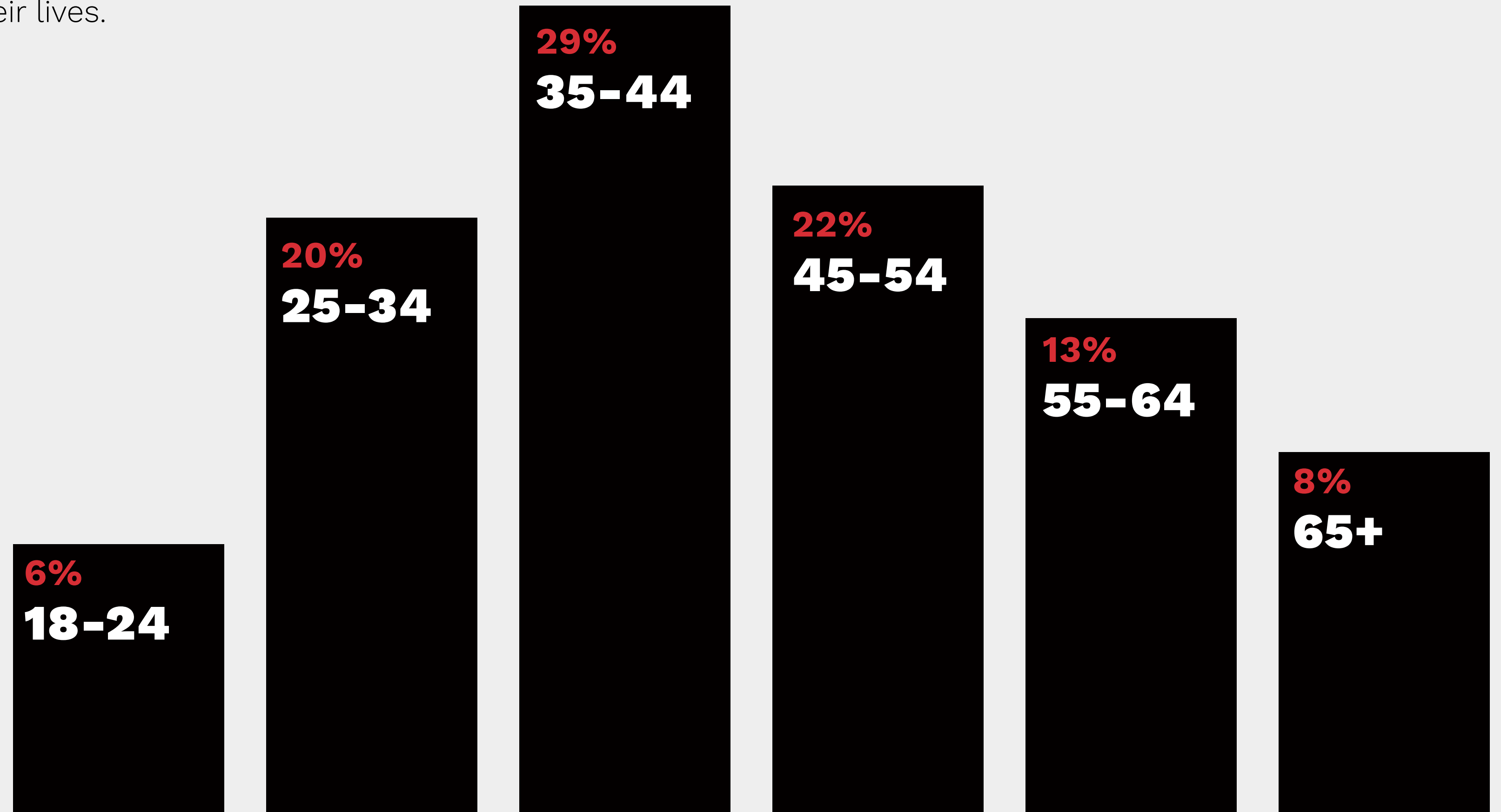
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77%
FEMALE

23%
MALE

Age

More than half of healthcare decision makers fall between the ages of 35 and 54. With an average age of 44, these consumers are in the busiest and most hectic years of their lives.





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Family Structure

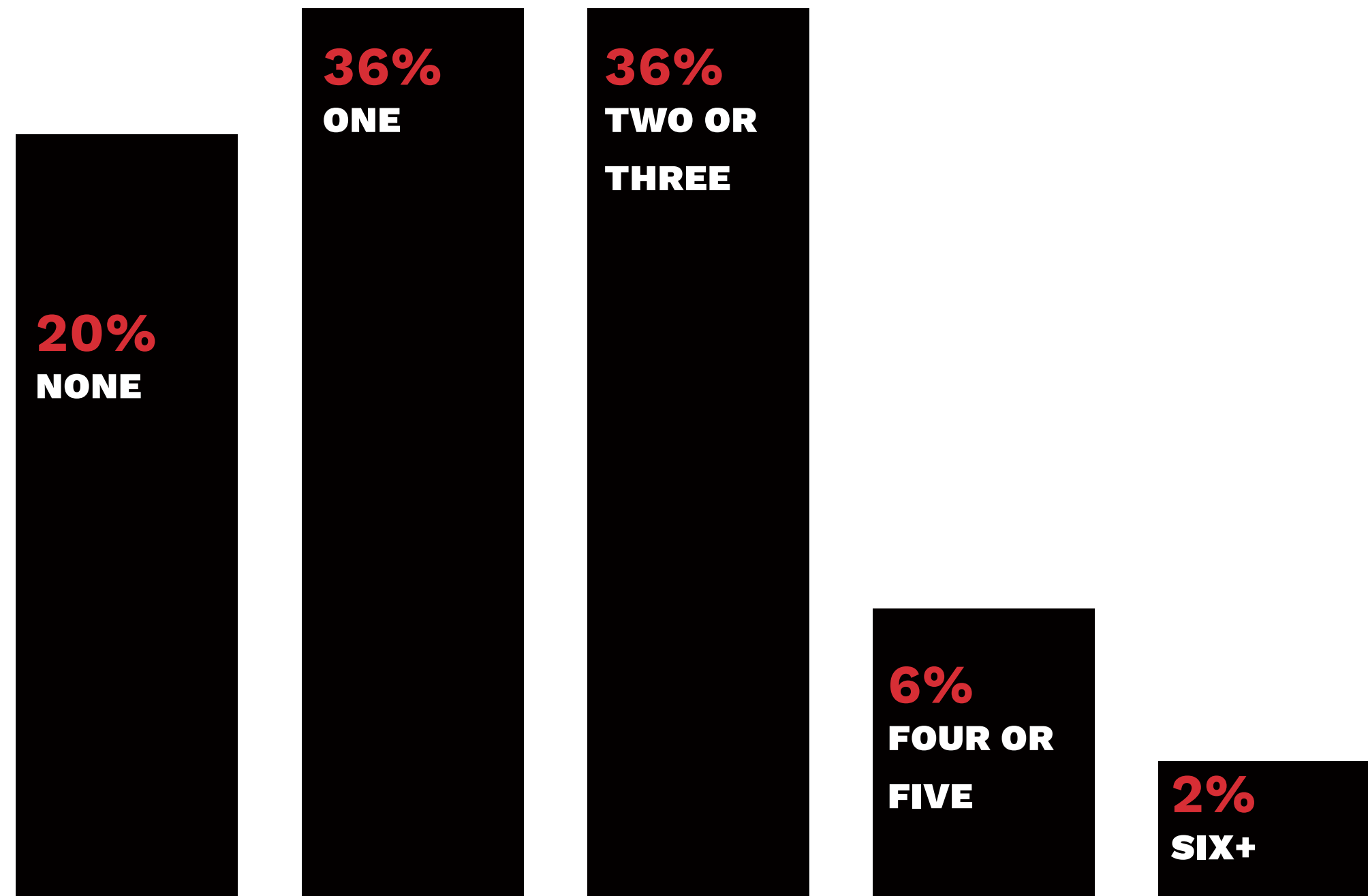
They are most likely married with at least one child living at home. In fact, 44% have multiple children at home, reinforcing the busy nature of their lives.

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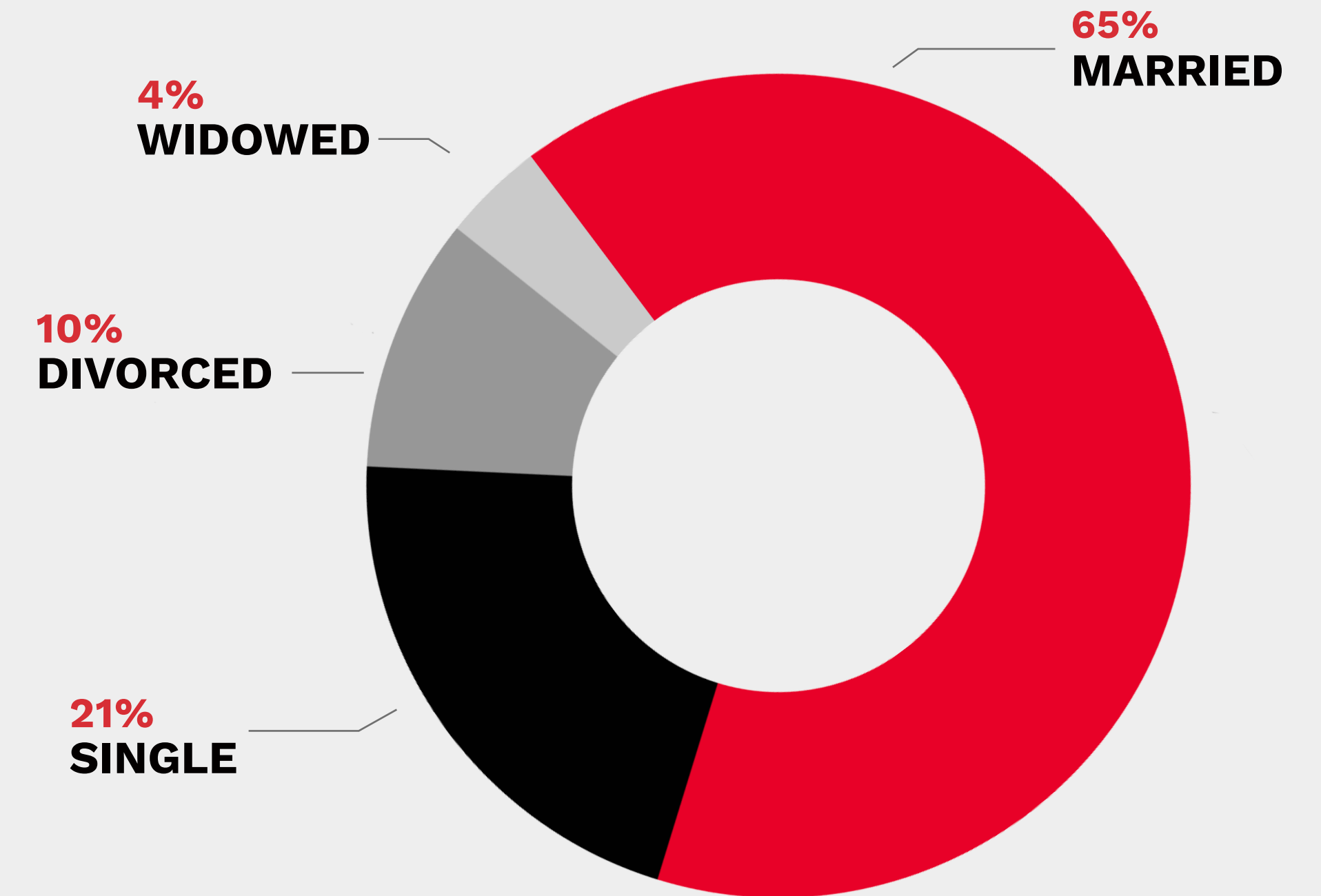
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CHILDREN UNDER 18 IN THE HOME



MARITAL STATUS

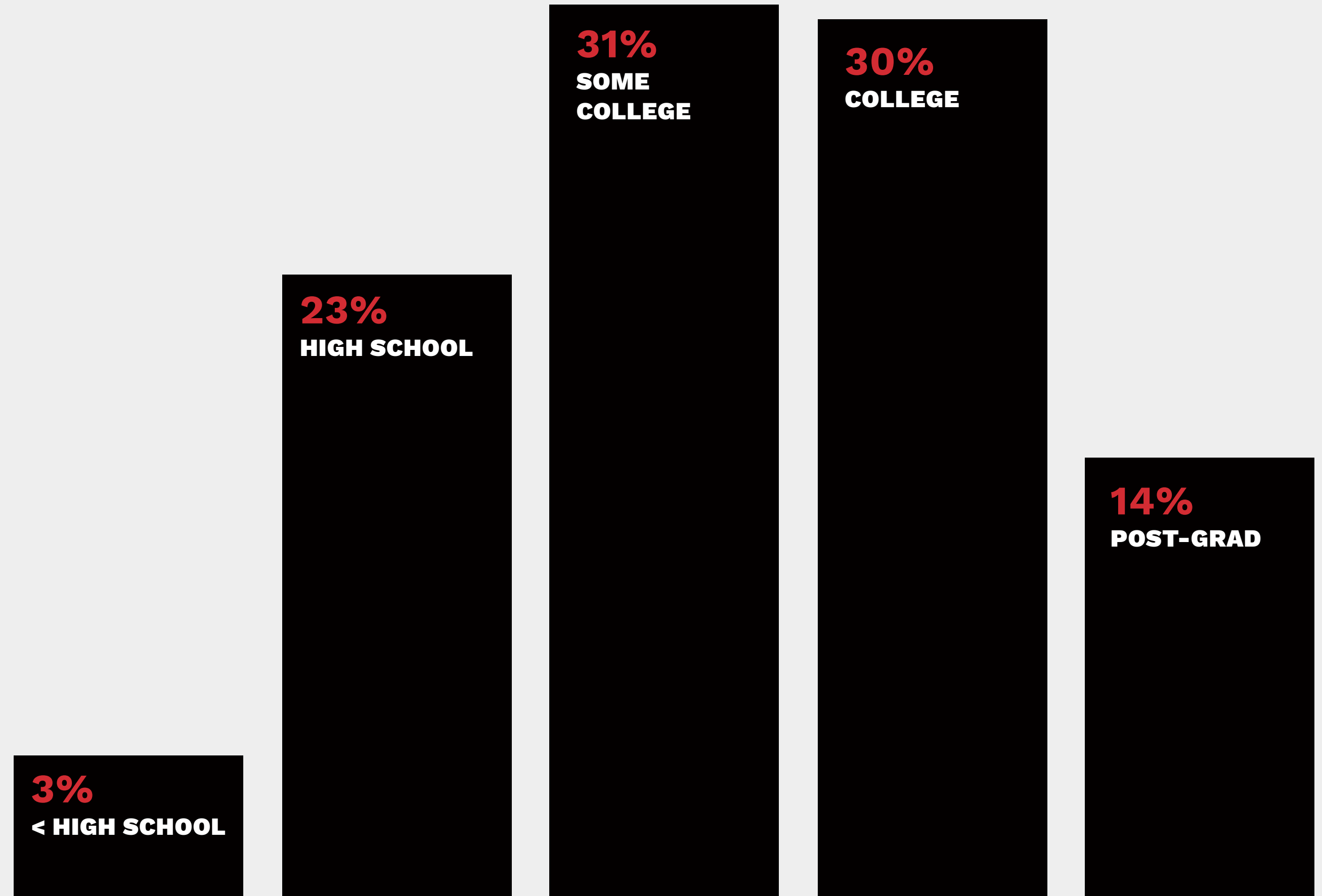




Education

Healthcare decision makers are well educated and more likely than the average American to have a college or advanced degree. They are sophisticated consumers who expect to be treated as such.

HIGHEST EDUCATION ACHIEVED



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Employment

While nearly half of healthcare decision makers are employed full time, they are 89% more likely than the average American to be a homemaker.

Regardless of their work situation, these are busy individuals who have many responsibilities beyond their role as a healthcare decision maker.

46%
**FULL-TIME
EMPLOYMENT**

19%
HOMEMAKER

10%
RETIRED

9%
**PART-TIME
EMPLOYMENT**

7%
UNEMPLOYED

7%
SELF-EMPLOYED

2%
STUDENT

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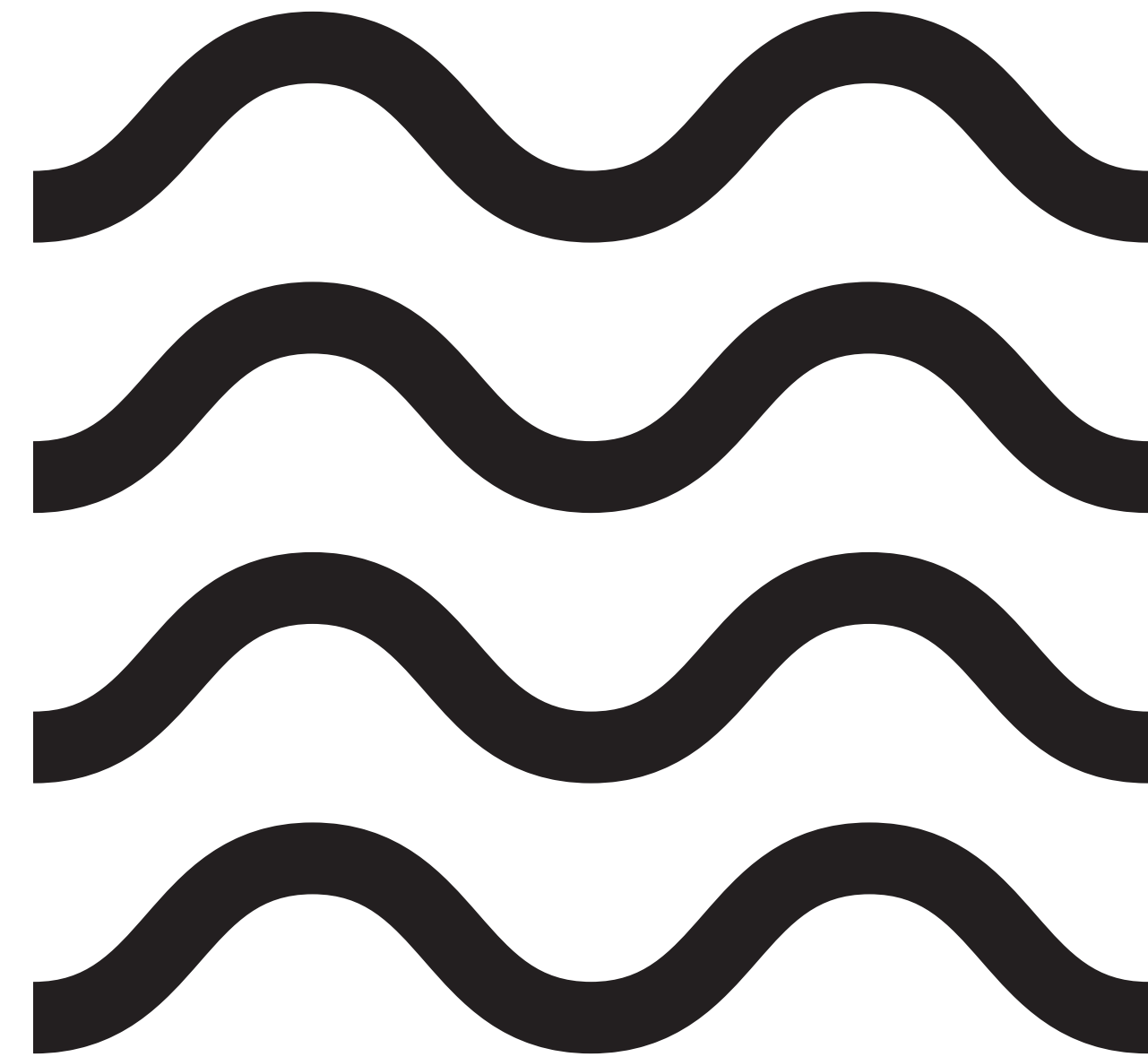
But that's just the surface...

Let's go deeper.

Know Your Consumer Below the Surface

While demographics are helpful in defining and targeting an audience, psychographics provide a more actionable view of how to build strategic marketing plans and smart creative that resonate and drives affinity for your brand. Understanding an audience's personal values allows marketers to connect more meaningfully and increase impact.

So what are the top values held by health decision makers? And how can that help us better connect with and motivate your audience?





Top Personal Values

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SAFETY IN ONESELF AND FAMILY

38% OF AUDIENCE (INDEX: 133)

They prioritize the preservation of their own safety and that of their loved ones, seeking secure surroundings and avoiding circumstances that might be unsafe. They also tend to desire harmony and stability and avoid conflict and change. To them, life is about personal safety.

Tip: Consider using themes of personal safety, awareness, assurance, shelter and protection from harm in your creative and messaging.

CARING FOR FAMILY AND FRIENDS

45% OF AUDIENCE (INDEX: 128)

They are devoted to the welfare of family and friends, and they often prioritize the needs of others ahead of their own needs. To them, life is about helping the people who are dear to them.

Tip: Consider using themes of caring, nurturing, acting in a genuine and honest manner and protection in your creative and messaging.

BEING RELIABLE AND TRUSTWORTHY

41% OF AUDIENCE (INDEX: 122)

They emphasize the importance of being dependable, responsible and faithful to family and friends. To them, life is about being there for loved ones when they need it.

Tip: Consider using themes of dependability, trust and honesty in your creative and messaging.

% Composition indicates the percentage of healthcare decision makers who possess a trait or attribute.

Index indicates how likely healthcare decision makers are to possess a trait or attribute compared to the average American.



Unlocking Consumer Insights for Healthcare Marketing Success

At ChappellRoberts, we use industry-leading consumer intelligence platforms to understand audiences with surgical precision. From identifying consumer traits based on medical conditions and the type of health-related content they consume to their payor type and everything in between, our work is guided by a deep and nuanced understanding of the healthcare decision-maker audience. And with tens of thousands of insights available, a comprehensive understanding of your *specific* audience is well within reach.

The insights in this deck only scratch the surface. Contact us to learn more about your specific audience and smart strategies to reach them.



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LET'S CREATE CHANGE[®]



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