

**WHYMOMSRULE.COM** A BOHAN perspective on marketing to America's 82 million Moms.



WHYMOMSRULE.COM  
2010 HEALTH CARE SURVEY



## Moms Unsure That Health Care Reform Went Far Enough

### OBJECTIVE

WhyMomsRule.com commissioned a survey to determine the influences and opinions of Moms on health care and health care reform. Considering that Moms influence the majority of health care decisions for themselves and their families, WhyMomsRule.com thought it was important to determine whether the opinions of Moms differed from that of the American public in general.

### METHODOLOGY

An online survey was conducted among U.S. Moms who were over 18 years of age with at least one child living in the household. BOHAN designed the questionnaire and methodology, gathered the results and implications and completed the report. The survey was fielded from Tuesday 10/05/10 to Friday 10/08/10 using an online survey tool. Results are based on 601 total responses: 199 Gen Y Moms, 201 Gen X Moms and 201 Baby Boomer Moms. The sample was provided by MarketTools' online survey database. There is a margin of error of 3-5% at a 95-97% confidence level.

**Cost continues to top Moms' list of health care concerns.**



## **EXECUTIVE SUMMARY**

### **Health Care Reform**

- Two-thirds of Moms are unsure that health care reform went far enough
- Moms do not understand the individual elements of health care reform
- Boomer Moms are more educated about health care reform than other Moms
- Moms' health care reform concerns center around increased cost and physician access

### **Health Care Marketing**

- Only one-third of Moms feel health care marketing campaigns speak directly to them
- The types of health care messages that resonate most with Moms are a mix of personal testimonials and technological news

### **Cost Concerns**

- Cost continues to overwhelmingly be Moms' primary health care concern
- Moms continue to delay medical care due to the cost of health care

### **Physician Relationships**

- Sixty-five percent of Moms either don't have a primary care physician or have a relationship of less than five years
- One in five spouses/partners does not have a primary care physician
- Most Moms have to motivate their spouse/partner to go to the doctor
- A majority of Moms are willing to switch doctors
- Physician marketers' biggest opportunities are with younger Moms

### **Hospitals**

- Moms will switch hospitals for reputation, expertise or new technologies
- Motivators to change hospitals do change by generation
- Moms see different advantages to different types of hospitals
- Moms see independent, community hospitals offering lower cost, closer physician relationships and better patient experiences
- Moms see university-affiliated teaching hospitals offering better technology, shared knowledge and broad services
- Moms see health system hospitals offering more services and shared knowledge and records
- Moms are willing to visit a hospital away from home, if necessary

## RESULTS

### Health Care Reform

#### Two-thirds of Moms are unsure that health care reform went far enough

Moms are an important and often overlooked demographic, especially regarding health care reform. Confirming WMR's 2009 health care survey, this year's survey found that Moms influence health care decisions not only for themselves (91%), but also for their spouses/partners (59%) and children (72%).

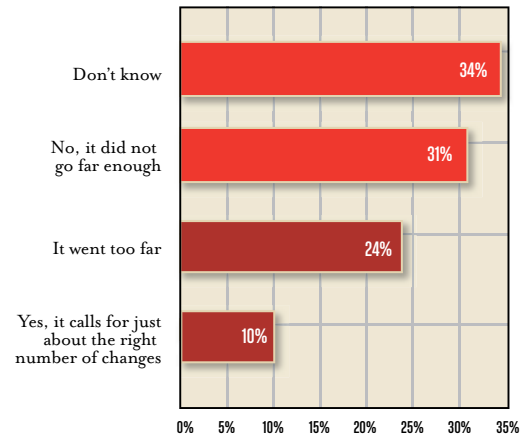
Last year, Why Moms Rule's survey on health care reform revealed that nearly eight in ten Moms thought that reform was needed, yet most did not feel adequately represented in the health care debate. This year, 34% of Moms were unsure if reform went far enough, and 31% say that health care reform did not go far enough. Only 10% of Moms think that it calls for just about the right number of changes, while another 24% think it went too far.

Boomer Moms (39%) are the most likely to think that it did not go far enough compared to Gen Y (27%) and Gen X (28%) Moms. On the other hand, Gen X Moms are the most likely to think it went too far (27%, vs. 22% of Gen Y and 24% of Boomers).

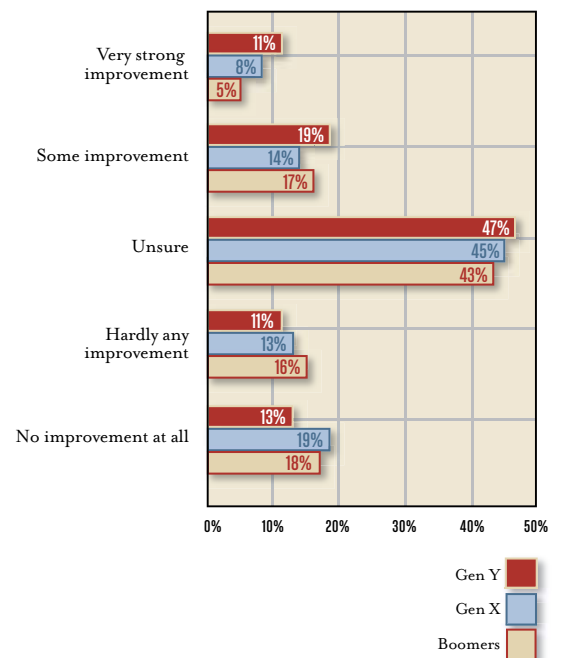
Moms seem to feel both unsure (45%) and concerned (29%) as to how reform will affect the quality of care for themselves and their families. Gen Y Moms are the most optimistic, with 30% saying that reform will somewhat to strongly improve their quality of care (vs. 22% of Gen X and Boomers).

Overall, most Moms (76%) agree that health care is an American right. Gen X Moms may be the most critical, with 16% disagreeing (vs. 10% of Gen Y and 13% of Boomers).

NOW THAT HEALTH CARE REFORM HAS PASSED, DO YOU THINK IT WENT FAR ENOUGH TO CHANGE THE HEALTH CARE SYSTEM?



HOW DO YOU THINK HEALTH CARE REFORM WILL CHANGE THE QUALITY OF CARE FOR YOU AND YOUR FAMILY?



### Moms do not understand health care reform elements

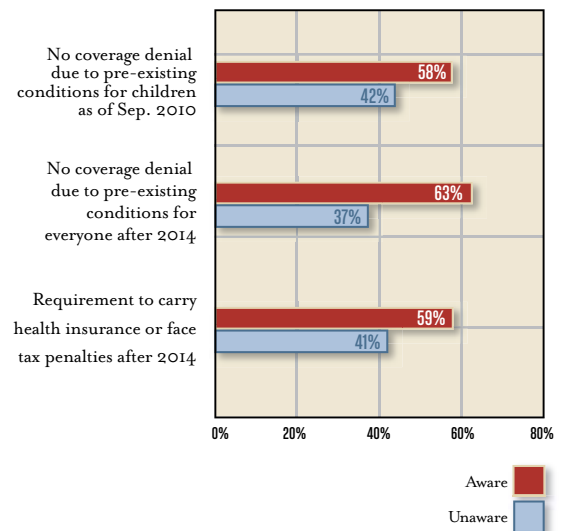
More than half (51%) of Moms say they are unsure about or unfamiliar with the elements included in the passed health care reform legislation, with 59% of Gen Y Moms leading that trend. Boomer Moms, on the other hand, seem to be the most familiar with health care reform (60% somewhat to very familiar, vs. 41% of Gen Y and 43% of Gen X).

Forty-one percent of Moms were not even aware that in 2014 everyone will be required to carry health insurance or face tax penalties. Thirty-seven percent did not know that no one can be denied coverage for health insurance due to a pre-existing condition after 2014, and 42% were unaware that just as of this September, children cannot be denied coverage for health insurance due to a pre-existing condition.

### Boomer Moms are more educated about health care reform than other Moms

Again, Boomer Moms were more educated about these elements of the health care reform than the other two generations: 70% of Boomer Moms knew about the requirement to carry health insurance by 2014, 75% knew they could not be denied coverage due to pre-existing conditions after 2014 and 67% knew that children could not be denied coverage due to pre-existing conditions as of now.

MOMS' AWARENESS OF HEALTH CARE REFORM ELEMENTS



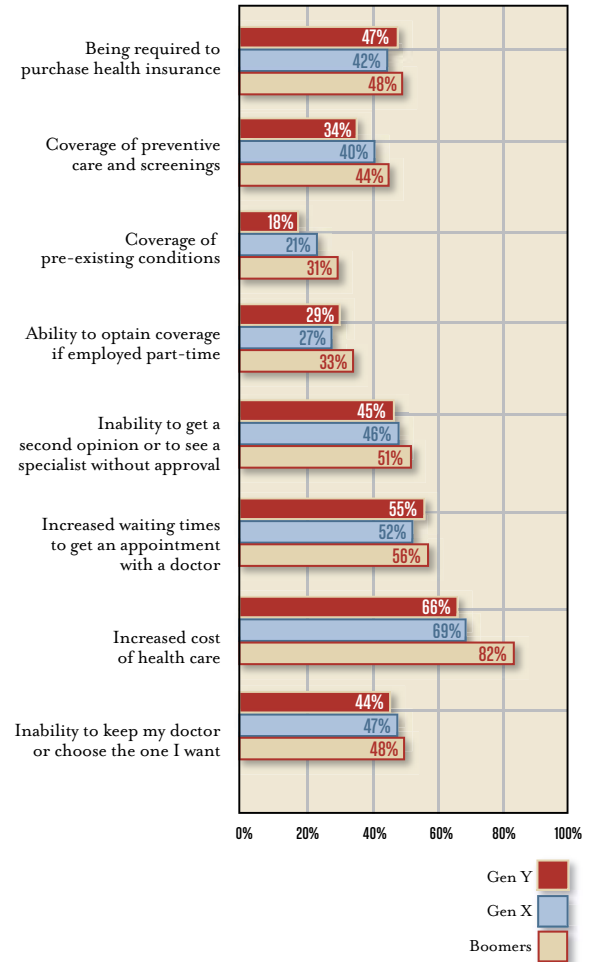
Most Moms don't fully understand health care reform.



**Moms' reform concerns center around increased cost and physician access**

Now that health care reform has passed, Moms are definitely more concerned about the increased cost of health care (72%) and increased waiting times to get an appointment with a doctor (54%). Close to half are also more concerned about the inability to get a second opinion or to see a specialist without approval (47%), the inability to keep their doctor or choose the one they want (46%) and being required to purchase health insurance (46%). Overall, Boomer Moms were slightly more concerned than the other generations about all of the above factors.

**MOMS' INCREASED CONCERNS NOW THAT HEALTH CARE REFORM HAS PASSED**



Moms have multiple concerns due to health care reform.

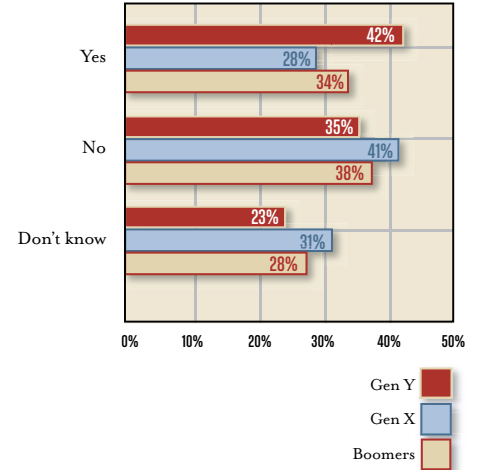


## Health Care Marketing

### Only one-third of Moms feel health care marketing campaigns speak directly to them

Interestingly, 38% of Moms don't think that hospitals and physicians are doing a good job with their marketing campaigns speaking directly to them. Only 35% think that they do and the rest were unsure. Gen X Moms are the most disappointed (41% disagree) while Gen Y Moms are the most content (42% agree).

ARE HOSPITALS AND PHYSICIANS DOING A GOOD JOB WITH THEIR MARKETING CAMPAIGNS TALKING DIRECTLY TO YOU AS A MOM?

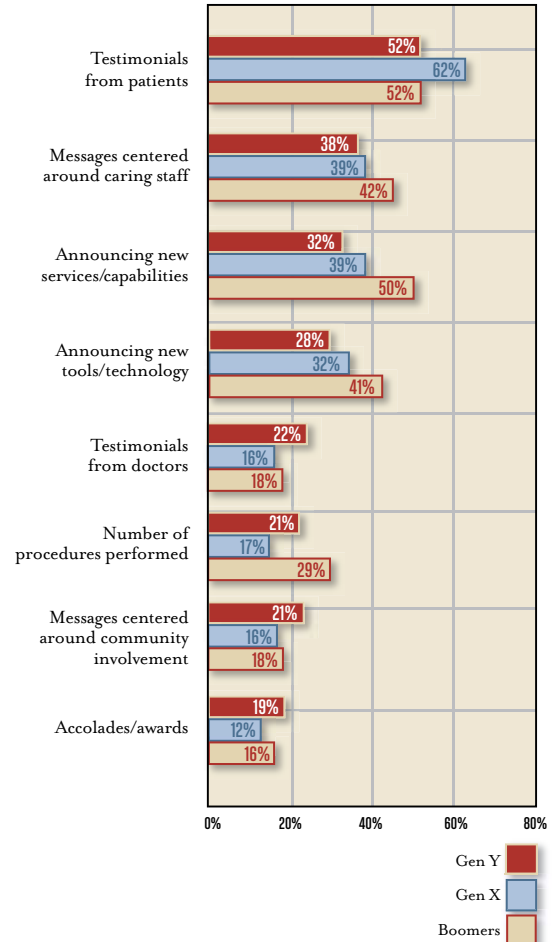


### The types of health care messages that resonate most with Moms are a mix of personal testimonials and technological news

Most Moms prefer health care messaging that focuses on testimonials from patients (56%), followed by announcements of new services/capabilities (40%), messages centered around caring staff (39%) and announcements of new tools/technology (34%).

Patient testimonials are more important to Gen X (62%) than Gen Y or Boomer Moms (52% each). On the other hand, messages centered around caring staff (42%), announcements of new services/capabilities (50%) and announcements of new tools/technology (41%) are most important to Baby Boomer Moms compared to her counter generations.

TYPES OF HEALTH CARE MESSAGING RESONATING WITH MOMS



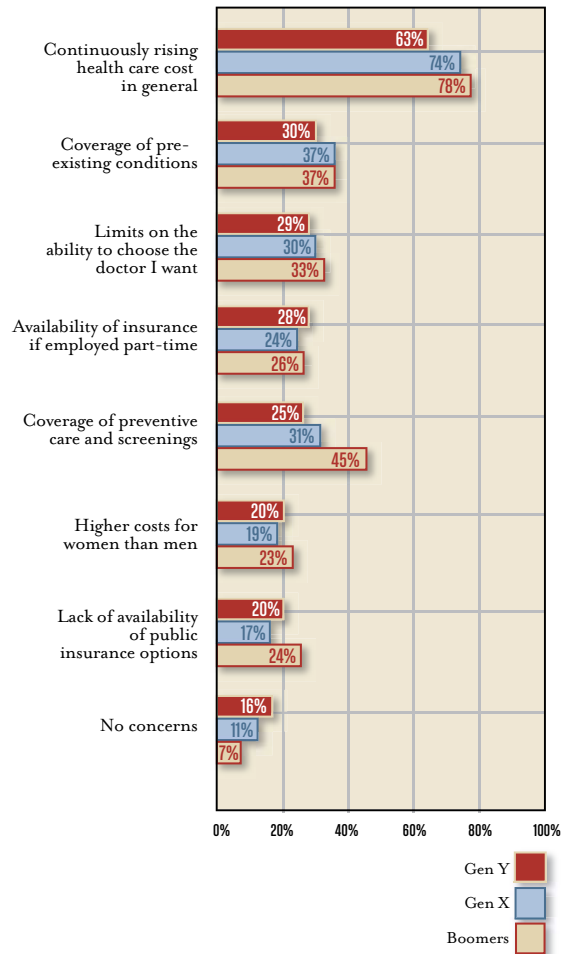
## Cost Concerns

### Cost continues to be the main concern about health care

Just as of last year, the survey found that the majority of U.S. Moms are concerned about being able to provide their family with affordable, quality health care in the future (92%) as well as today (89%). Boomer Moms tend to be more concerned than the other two generations (94% concerned about both the future and today).

Even though Moms are still generally satisfied with their current health care coverage (64%), they are highly concerned with the continuously rising health care cost in general (72%). They're also afraid that health care reform will lead to higher out-of-pocket costs (61%).

MOMS' BIGGEST HEALTH CARE CONCERNS



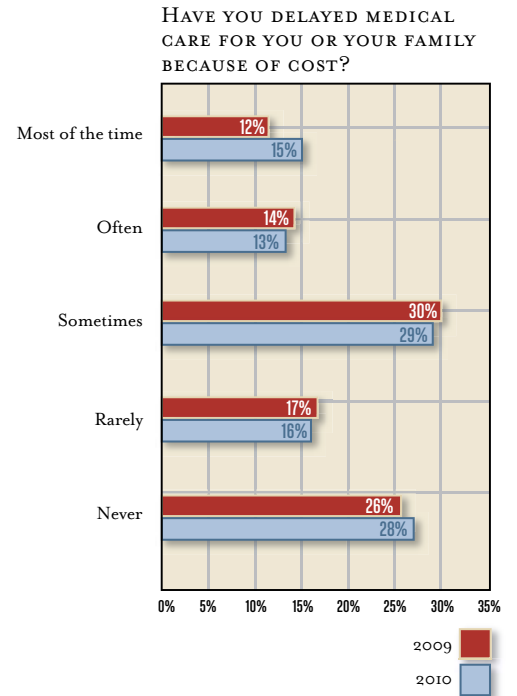
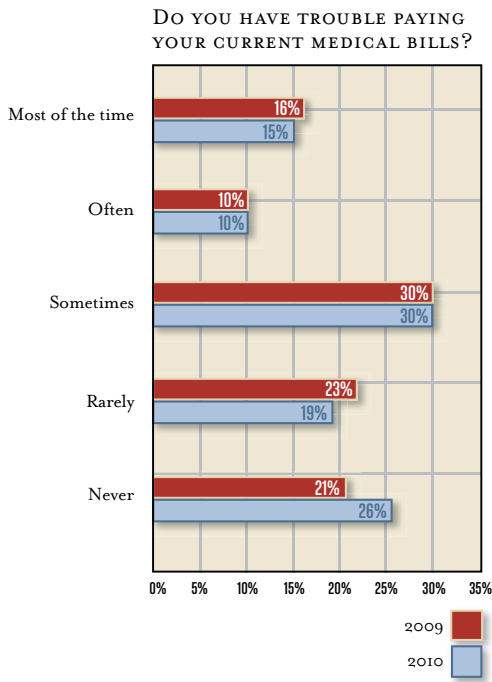
Moms fear that health care reform will lead to higher out-of-pocket costs.





### Moms continue to delay medical care due to cost

More than half of respondents reported that at least some of the time they have trouble paying current medical bills (55%) and have delayed medical care for themselves or their family because of cost (57%). These results are very similar to last year's survey and do not differ strongly between generations.



**55% of Moms have trouble paying medical bills at least some of the time.**

## Physician Relationships

**Sixty-five percent of Moms either don't have a primary care physician or have a relationship of less than five years**

Half of Moms (50%) have been going to their primary care physician for four years or longer.

On the other hand, 14% of Moms don't currently have a primary care physician.

Boomer Moms are the most loyal, with close to half (49%) having gone to their primary care physician for five years or more. Gen Y Moms fall on the opposite spectrum, with 45% having gone to their doctor for three years or less and 18% not having a primary care physician at all.

### One in five spouses/partners does not have a primary care physician

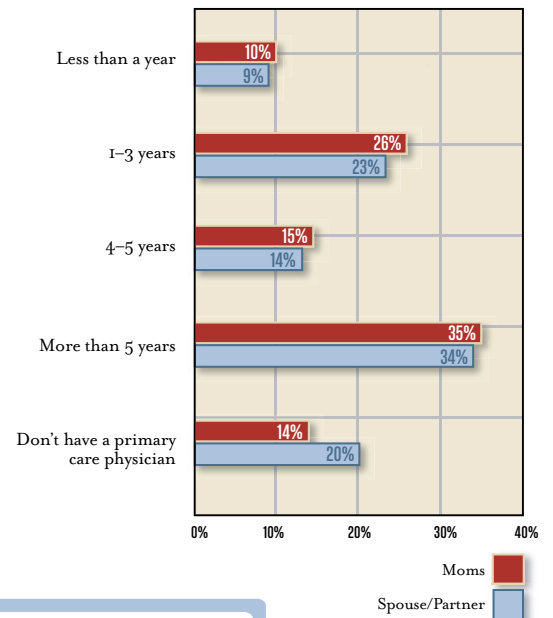
Considerably more spouses/partners (20%) than Moms (14%)

don't have a relationship with a primary care physician at all.

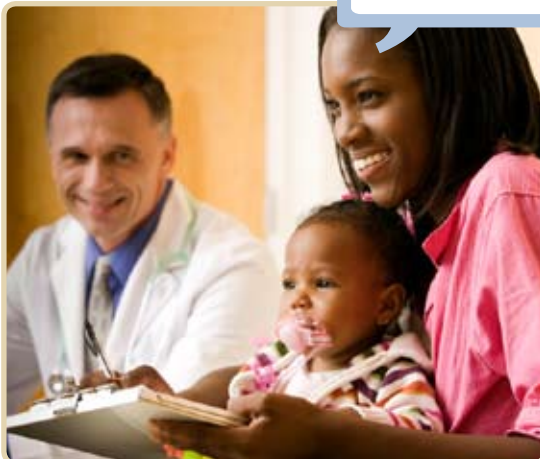
Only 48% have been going to their primary care physician for four years or longer, while 32% have been going for three years or less.

Again, Boomer Moms' spouses/partners tend to be more loyal to their doctors, while Gen Y spouses/partners are the least loyal. More than half of Boomer spouses/partners (60%) have been going to their primary care physician for four years or more (vs. 33% of Gen Y and 50% of Gen X). On the opposite spectrum, more than one-fourth of Gen Y Moms' spouses/partners (28%) don't even have a primary care physician at all (vs. 18% of Gen X and 13% of Boomers).

LENGTH OF TIME VISITING THEIR CURRENT PRIMARY CARE PHYSICIAN



**One in five Gen Y Moms doesn't have a primary care physician.**

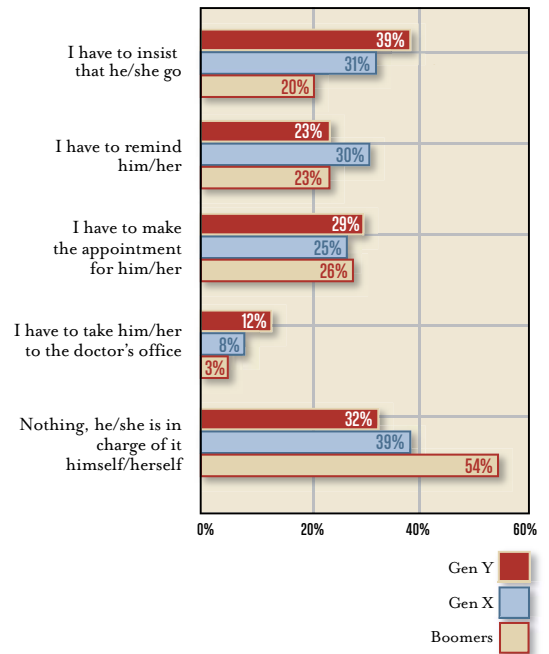


**Most Moms have to motivate their spouse/partner to go to the doctor**

More than half (58%) of Moms who have spouses/partners have to do something to get them to go to the doctor — anywhere from having to insist that they go (31%) to reminding them (26%) to making the actual appointment for them (27%) or physically taking them to the doctor's office (8%).

And, this becomes more true with younger Moms. Boomer Moms' spouses/partners are the most autonomous of the bunch with more than half of those spouses/partners (54%) being in charge of their own doctor's visits. Gen Y Moms' spouses/partners, on the other hand, need the most pushing. Only 32% of them are in charge of their own doctor's visits.

WHAT DO YOU HAVE TO DO TO GET YOUR SPOUSE/PARTNER TO GO TO THE DOCTOR?



Most Moms struggle with getting their spouses/partners to go to the doctor.



### A majority of Moms are willing to switch doctors

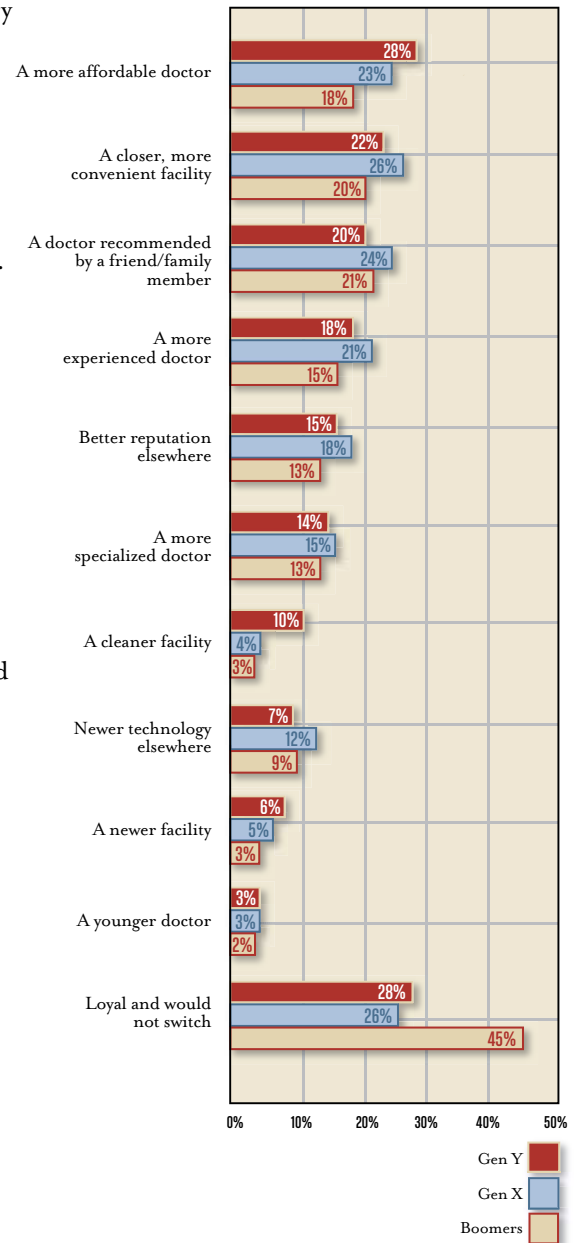
One-third of Moms say they are loyal to their primary care physician and would not switch under any circumstances. Close to one-fourth would switch for a more affordable doctor (23%) or a closer, more convenient facility (23%), however. Twenty-two percent of Moms would also switch if a doctor was recommended to them by a friend or family member.

### Physician marketers' biggest opportunities are with younger Moms

As one might expect, Boomers tend to have closer relationships with physicians. Close to half (45%) of Boomer Moms say they would not switch to another doctor under any circumstances. Gen X Moms are the least loyal group of Moms (26%). Close to one-fourth of Gen X Moms would switch for a closer, more convenient facility (26%), if a doctor was recommended by a friend or family member (24%), for a more affordable doctor (23%) or for a more experienced doctor (21%).

While 28% of Gen Y Moms are loyal to their doctors and would not switch, finding an affordable doctor is very important to Gen Y Moms, and 28% say they would switch if that were the case.

MOTIVATORS TO SWITCH TO A NEW PRIMARY CARE PHYSICIAN



A majority of Moms are willing to switch doctors.

## Hospitals

### Moms will switch hospitals for reputation, expertise or new technologies

One-fourth of Moms are loyal to their preferred hospital. However, 29% would switch for access to more experienced doctors and a better reputation, 28% would switch for newer technology and 26% would switch for access to more specialized doctors.

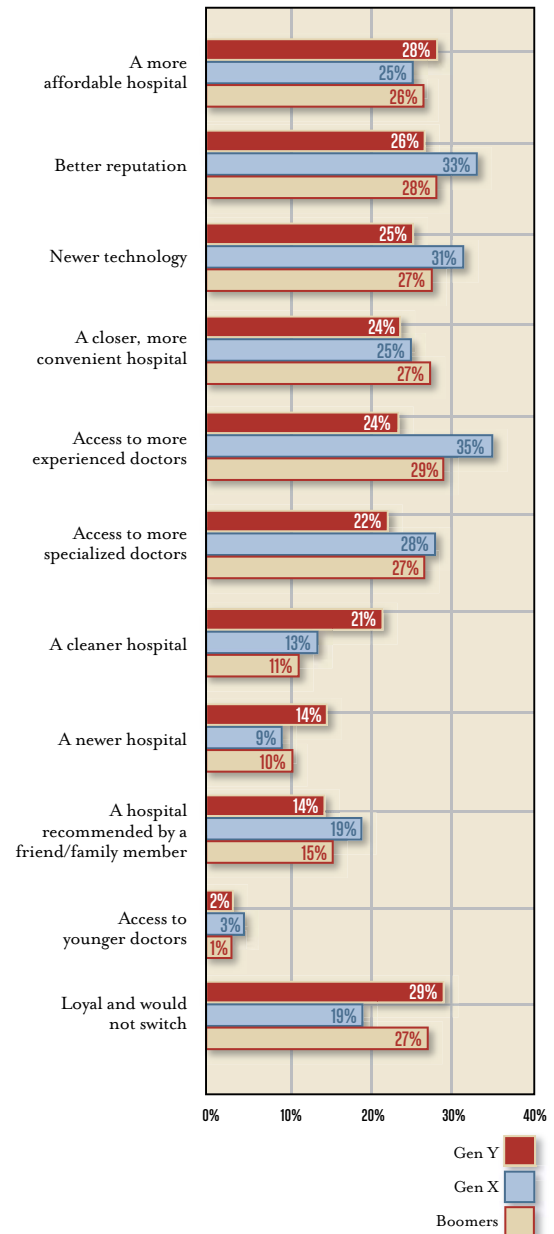
Affordability and convenience were also big factors: 26% of Moms would switch from their preferred hospital for a more affordable hospital and 25% would switch for a closer, more convenient hospital.

### Motivators to change hospitals do change by generation

Interestingly, Gen Y is the most loyal to their preferred hospital (29%) while Gen X is the least loyal (19%). Gen Y Moms are more likely to switch to a cleaner or newer hospital than the other two generations.

Approximately one-third of Gen X Moms would switch for access to more experienced doctors (35%), better reputation (33%) and newer technology (31%) – more so than any of the other two generations.

MOTIVATORS TO SWITCH FROM A PREFERRED HOSPITAL



**Moms see different advantages to different hospital types**

Moms were asked about advantages of the following types of hospitals:

- Independent, community hospitals
- University-affiliated teaching hospitals
- Hospitals that are part of a larger health system

**Moms see independent, community hospitals offering lower cost, closer physician relationships and better patient experiences**

The primary advantages Moms see to an independent, community hospital include:

- Less expensive services (25%)
- Closer relationships with physicians/staff (22%)
- Better overall patient experience (21%)

There were no noticeable differences between the generations to those particular advantages.

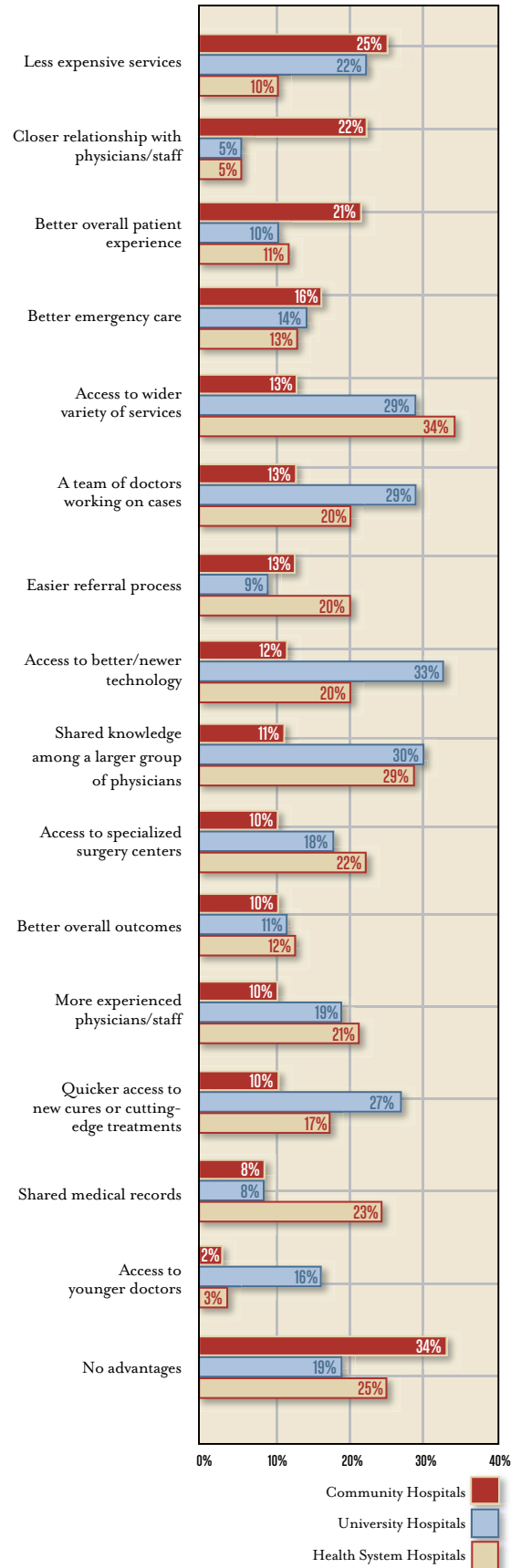
**Moms see university-affiliated teaching hospitals offering better technology, shared knowledge and broad services**

The primary advantages Moms see to a university-affiliated teaching hospital include:

- Access to better/newer technology (33%)
- Shared knowledge among a larger group of physicians (30%)
- Access to a wider variety of services (29%)
- Having a team of doctors working on their case (29%)
- Quicker access to new cures or cutting-edge treatments (27%)
- Less expensive services (22%)

With the exception of “less expensive services,” Boomer Moms feel significantly stronger about these advantages than their counter generations: on average 15% more so than Gen Y and 8% more so than Gen X.

ADVANTAGES TO DIFFERENT HOSPITAL TYPES



### **Moms see health system hospitals offering more services and shared knowledge and records**

The primary advantages Moms see to a hospital that is part of a larger health system include:

- Access to a wider variety of services (34%)
- Shared knowledge among a larger group of physicians (29%)
- Shared medical records (23%)
- Access to specialized surgery centers (22%)
- More experienced physicians/staff (21%)
- Access to better/newer technology (20%)
- Easier referral process (20%)
- Having a team of doctors working on their case (20%)

Gen Y Moms feel considerably less strong about the advantage of access to better technology (16%, vs. 21% of Gen X and 24% of Boomers), having shared medical records (19%, vs. 26% of Gen X and 25% of Boomers) and access to specialized surgery centers (15%, vs. 26% of Gen X and 24% of Boomers).

On the other hand, Boomer Moms feel noticeably stronger about the advantage of access to a wider variety of services (42%, vs. 28% of Gen Y and 33% of Gen X) and more experienced physicians/staff (25%, vs. 20% of Gen Y and 18% of Gen X).

### **Moms will visit a hospital away from home, if necessary**

Most Moms would be willing to leave their local area to seek a second opinion (81%) or to seek treatment (80%), if they were diagnosed with a serious condition. Moms across all generations agree.

According to the U.S. Census Bureau, of the 108 million adult women in the U.S., 82 million are Moms. Thirty-two million of those women have children living in their homes. Moms control 80% of the purchases in their families and spend \$1.7 trillion annually. David Bohan, CEO of BOHAN Advertising | Marketing, has spent much of his career tracking the trends and influences on Moms and their buying habits. BOHAN's village concept of planning and collaboration is core to understanding consumers and creating meaningful conversations with them.

On most days, you can find David at our headquarters in Nashville, Tennessee, working with our fellow villagers. Check us out online at [www.bohanideas.com](http://www.bohanideas.com), give him a call at 615-327-1189 or shoot him an e-mail:

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**WHYMOMSRULE.COM** A BOHAN perspective on marketing  
to America's 82 million Moms.

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