

Yankelovich MONITOR
2006/2007

Getting to *Next*



Self-Invention and Self-Care
Health Care in the Era of Consumer Empowerment

August 29, 2007



marketer-driven

OUTSIDE-IN ECONOMY

Consumer as Dependent
Business as Usual

all business

control is corporate

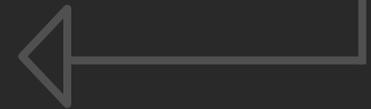
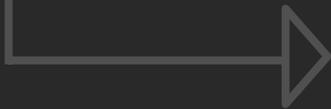
INSIDE-OUT ECONOMY

Marketers given Direction
Very Unusual Business

very personal

control belongs to consumer

consumer-driven



"Let Go World"

AdAge October 6, 2006

"A.G. Lafley Tells Marketers to Cede Control to Consumers to Be 'In Touch'"

ORLANDO, Fla. (AdAge.com) -- Procter & Gamble CEO A.G. Lafley urged marketers to **"let go"** of their brands and bow to consumer wants and needs in his kickoff to the Association of National Advertisers conference here today.



Mr. Lafley, who last spoke at an ANA conference in 2000, hit on many of the same themes that he took up then, especially that of the consumer being boss, and he even reprised a handful of campaigns that had been shown at previous ANA meetings by his colleagues.

But his repeated refrain that we now live in a "let-go world" was refreshing. He said that thanks to 30 or so years of media fragmentation and the more recent rise of user-generated content, marketers were most likely to succeed and be "in touch" when they let consumers be in control.

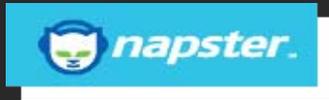
"Consumers are more participative and selective and the trend from push to pull is accelerating," said Mr. Lafley, the keynote speaker to a conference that has pulled in around 1,000 attendees, including more than 400 marketers.

77%

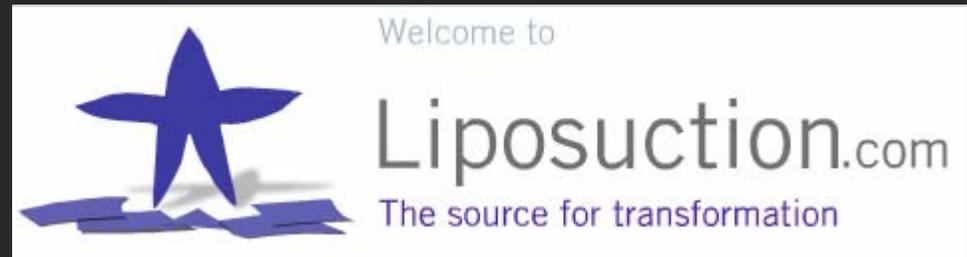
**I think my IQ is
higher than average**

2005 Yankelovich Financial Services MONITOR (top 2 box)

Life



Self Inventing Ourselves



Hair loss won't wait.
So the sooner you join Rogaine Results, the better.

The Rogaine Results email program could be just what you need to succeed with Rogaine. It's full of good information, strong motivation, and great offers on Rogaine. Use Rogaine Results as your coach and companion and get the support that can lead to success.

SIGN UP NOW



 **TODAY**

62-year-old mother 'enjoys kids'

Feb. 21: Janise Wulf, a 62-year-old great-grandmother who became one of the oldest women in the world to successfully give birth, talks to "Today" show host Campbell Brown.

Self-Invention

LOOKS LIKE ...



Separating anatomy from what it means to be a man or a woman, New York City is moving forward with a [plan to let people alter the sex on their birth certificate even if they have not had sex-change surgery](#).

Under the rule being considered by the city's Board of Health, which is likely to be adopted soon, people born in the city would be able to change the documented sex on their birth certificates by providing affidavits from a doctor and a mental health professional laying out why their patients should be considered members of the opposite sex, and asserting that their proposed change would be permanent. ([NYT, 11.7.06](#))

GETTING TO NEXT

Important to you in your personal life today: Being as self-reliant as possible



(Top 2 box on a 7-pt. scale where a 7 is "extremely important")

GETTING TO NEXT

Agree more with “following your own instincts” or “listening to experts”

Following own instincts

2002

61%

TODAY

76%

GETTING TO NEXT

Important that others see you as someone who can see through exaggeration and hype

2002

38%

TODAY

58%

GETTING TO NEXT

I always know how to get the information I need to make decisions

2002

61%

TODAY

76%

GETTING TO NEXT

I'm overwhelmed by all of the sources of information available today



1996	TODAY
61%	48%

44%

2004

60%

TODAY

Researching products
before buying is
important to me





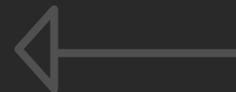
I often **know more** about the products being sold in stores than the people who are selling the products

48%

2005

56%

2006



Signs & Signals



CSI:
CRIME SCENE INVESTIGATION

CSI:
MIAMI

CSI: NY



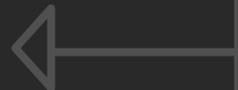
HANDBOOK EVIDENCE TOOLS PROCEDURES

- Endogenous testosterone
- Endotoxic shock
- Entomology, forensic
- Ephedrine
- Epinephrine
- Epithelial cells
- Erythema
- Ethylene glycol
- Ethylenediaminetetraacetic acid (EDTA)
- Exothermic reaction
- Exsanguination
- Extensor
- Facial edema
- Femoral artery
- Ferrotracing
- Fingerprint
- Fire coral
- Firing pin impression

Jimsonweed
(*datura stramonium*)



Poisonous annual weed of the nightshade family with pungent foliage, large violet or white trumpet-shaped blossoms, and round, prickly fruit.



GET CUSTOM LABELS

Add a bit of your own style to a classic. Turn a bottle of Johnnie Walker Black Label into a personalized gift for friends, family or business associates with a customized label. Or show your own true colors with a special message for your own bottle.

To order yours at no cost. [CLICK HERE](#)

HERITAGE EVENTS LABELS GIVING THE KEEP AD GALLERY CUSTOM LABELS

GET TOASTS IT'S ON ME!

WHEATIES

THE BREAKFAST CHAMPIONS

Picture yourself on a Wheaties box!

HEINZ SINCE 1869

JAMIE AND MARK JUST MARRIED

SAY IT WITH **HEINZ**

Heinz Ketchup wants to help you celebrate! Whether as a unique favor, customized gift or just for fun, custom bottles from Heinz help to make any occasion truly special.

RSS

Printed M&M'S®

Easy Steps to Personalize Your M&M'S®. Message

MY MESSAGE **MESSAGE**

Colors Chosen:

1 Choose Your Colors **2** Enter Your Message **3** Select Your Packaging

JONES

PERSONALIZE YOUR BOTTLE OF MYJONES TODAY.

Send a personalized Love Potion #6 with myJones.com

the Original. Your Turn.

Customize

Tote Size: Please Select

Handle Length: Please Select

Customize Colors

Body: Select color

Handle: Select color

Bottom: Select color

Zip Top (optional): No Yes (add \$7.00)

Pocket Color: Select color

Outside Pocket (optional): No Yes (add \$2.00)

Packet Color: Select color

[Skip Intro](#)

The Power of Empowered Customers

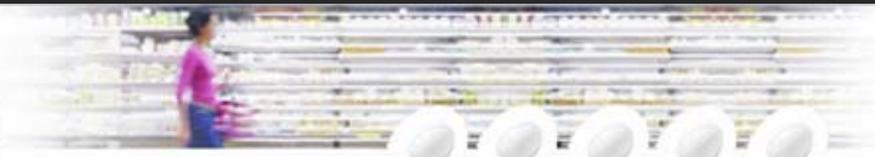
- Get objective information from suppliers
- Initiate requests for information
- Design and configure customized offerings
- Use buying agents for sellers to compete
- Join together in buying consortiums
- Make offerings unbundled
- Pay for use in new ways
- Get peer feedback on products

Adapted from Mohan Sawhney, McCormick Tribune Professor of Technology, Kellogg School of Management, Northwestern University, "Rethinking Marketing in a Connected World," January 2003



EGGFUSION

Promoting Freshness with Every ImpressionSM



CONTACT

ADVERTISERS
RETAILERS
PRODUCERS
CONSUMERS

.....
A Fresh Idea
.....

Proven Safe
.....

Value-Added
Service for You
.....

MyFreshEgg.com
.....

Q & Eggs
.....



CONSUMERS

Fresh Eggs for Healthier, Happier Families

Tamperproof, individualized Freshness & Traceability Coding lets you more confidently choose and use eggs for yourself and your family.

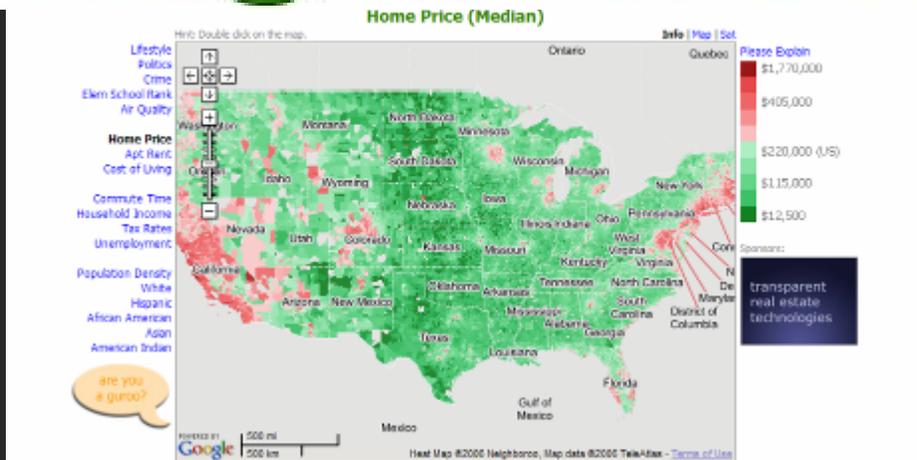


A University of Arizona professor has invented a sticker that can tell consumers if a fruit or vegetable is ripe. With no simple way to tell whether fruit that looks good on the outside will taste good on the inside, consumers often buy peaches, pears and melons they can't eat because they're under-ripe or overripe... A marker on the stickers detects a chemical called ethylene gas, which is released by fruit or vegetables as they ripen. As that happens, the sticker turns from white to blue.

(AP, 7.26.06)

neighbor

BETA




Zillow.com ^{Beta} _{TM}

Your Edge in Real Estate



Philips Kitten Scan, is a miniature CT scanner that is an educational resource for children. **Children select a toy, place it on a miniature exam table and slide it into the Kitten Scan to learn why the toy is 'sick.'** Animation appears on a screen that shows children what doctors are looking for inside the toys and tells them a story about each one.

**From patients as
health care
consumers... To
patients as health
care collaborators**

Yankelovich Health Practice

- **Global Health & Wellness (GHW)**
 - 2007 survey of attitudes and habits across 17 countries
 - Tracking for U.S. versus 2005
- **PULSE Health Segmentation**
 - Attitudinal micro-segmentation of health care orientation
 - 25 consumer segments
 - Can be scored onto patient and consumer databases (without attitudinal data collection)
 - Individually targetable messages and marketing strategies based on GHW insights

Medical Information-Seeking Activities

Selected activities done 1+ times in past 12 months

- | | |
|---|-----|
| • Talked to pharmacist about a drug | 52% |
| • Visited company Web site for product info | 50% |
| • Talked to doctor about drug heard about | 49% |
| • Participated in online forum/chat | 19% |
| • Stopped using product based on friend | 18% |
| • Called toll-free number for product info | 16% |
| • Posted comment on blog about product | 11% |

Interest in Medical Information

Selected reasons cited top 2 box

- Information about drug safety 71%
- Comparisons of drugs for same illness 63%
- What health care providers think of a drug 49%
- Kind of research conducted on a drug 47%
- Discussion of science of how a drug works 46%
- Articles from scholarly articles 40%
- Information from company making a drug 37%
- Testimonials from users of a medication 36%

Reasons for Using Internet as Health Information Source

Selected reasons cited

- To research specific disease 71%
- To diagnose symptoms am having 48%
- To stay current on new developments 42%
- To compare information across several sources 27%
- To get information to take in to health care professional 22%
- Saw health story and wanted to get more information 22%

Understanding of Medical Information

Selected mentions cited top 2 box

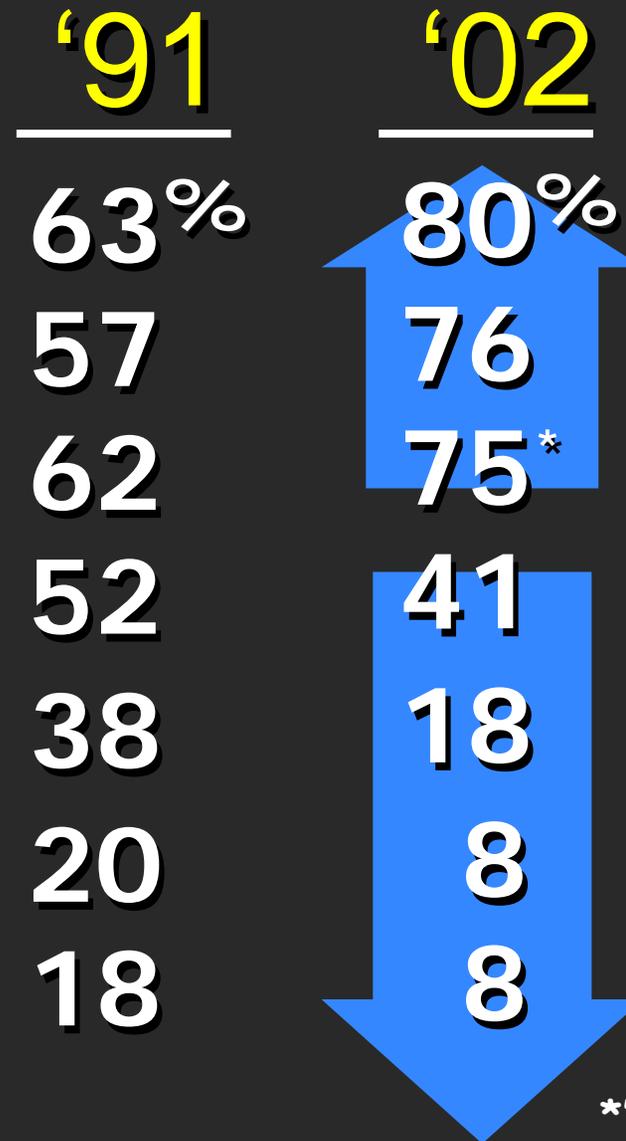
- Understand medical information well enough to make **smart** decisions 57%
- Understand medical information well enough to know what is and is not **accurate** 46%
- Understand medication well enough to **explain** it to others 43%
- Understand **technical** terms in information read or hear 36%
- Take information to health care professional to get him or her to explain it to me 25%

Quality

Intangibles

Time

Signs of success:



*'01 Data

According to the International Spa Association, there were 8,734 day spas in the US in 2004, up from 4,389 in 2002, accounting for \$5.4 billion.



According to a 2003 survey by the Sporting Goods Manufacturers Association, 13.4 million Americans practice yoga or other mind-body exercises such as tai chi



Top 10 ways to maintain health

- | | | |
|----|---|-----|
| 1 | Maintaining personal hygiene and cleanliness | 68% |
| 2 | Maintaining a positive attitude | 62 |
| 3 | Maintaining/cultivating good family relationships | 57 |
| 4 | Staying active | 50 |
| 5 | Keeping stress at a manageable level | 50 |
| 6 | Not overindulging in alcohol | 49 |
| 7 | Getting enough sleep | 48 |
| 8 | Keeping things in perspective | 45 |
| 9 | Getting regular medical check-ups or annual exams | 45 |
| 10 | Socializing and spending time with friends and family | 44 |

The Yankelovich Preventive Health Care and Wellness in America Report 2005

What does “living well” mean?

Make consumers smarter:

Innovations that empower people to enhance their lives through meaningful and rewarding experiences.



THANK YOU

www.yankelovich.com