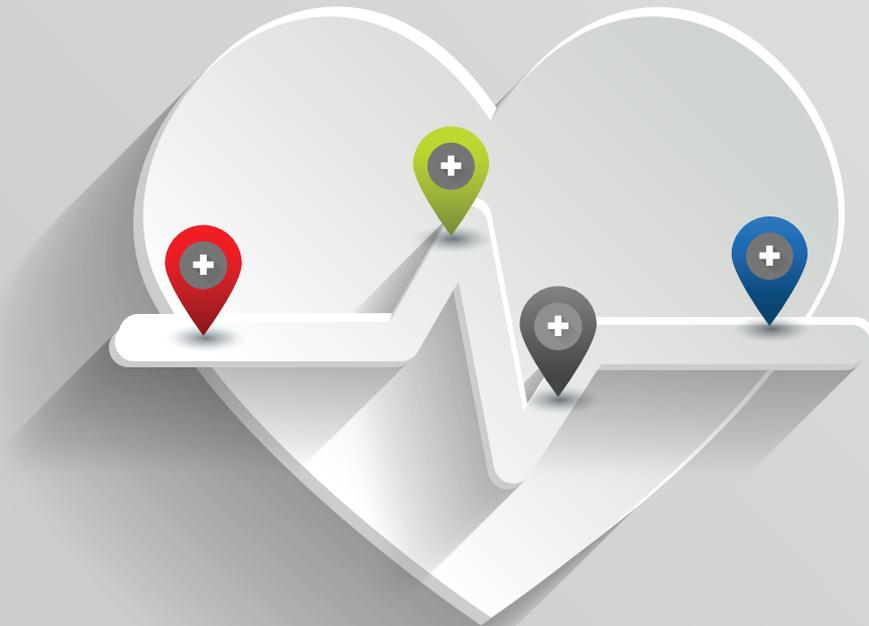


THE HISPANIC HEALTHCARE JOURNEY

Insights for healthcare marketers in crafting
culturally relevant outreach, based on a study
of U.S. Hispanics' attitudes and behaviors

By Barbara Peck



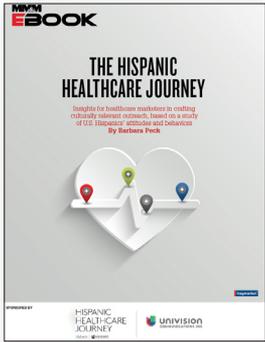
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The Univision/Nielsen study examines the drivers of Hispanic healthcare attitudes and behaviors

¿SE SIENTE BIEN? A HISPANIC HEALTHCARE OVERVIEW

Hispanic communities are diverse and health-conscious.

A long-overdue study delves into the healthcare beliefs and behaviors of Hispanics and non-Hispanics in the U.S. For this extensive study, Univision Communications, the leading media company serving Hispanic America, partnered with Nielsen.

It may seem surprising that, until now, little attention has been paid to the healthcare attitudes of U.S. Hispanics. Carlos Gutierrez, MD, VP of Strategy and Insights, Healthcare at Univision, says that several misperceptions have contributed to that lack of research.

“If you ask people how many Hispanics there are in the U.S., they might guess 14 million,” he says. Few realize the Hispanic population has already reached 58 million. That number has risen steadily over the past few decades and now represents 18% of the

population. U.S. Census Bureau projections indicate Hispanics will account for 29% of the total U.S. population by 2060.

Similarly, people underestimate the buying power of Hispanics, who now contribute about \$1.3 trillion a year to the U.S. economy. Furthermore, the March 2016 U.S. Census Current Population Survey revealed that 83.8% of Hispanics currently have health insurance. That’s a record high for the U.S. Hispanic population.

However, Felisha Lewis, VP, Healthcare Custom Insights at Nielsen, notes, “Since marketers don’t always have the resources to create separate programs for ethnic groups, there has been little research that breaks down consumers by ethnic groups.”

The lack of Hispanic-focused research led Univision and Nielsen to partner on the Hispanic Healthcare Journey study. To kick

83.8% of Hispanics currently have any type of health insurance.

— U.S. Census Current Population Survey ASEC, March 2016

off the study, focus groups were conducted in 2015 to help inform the quantitative survey that followed.

The recruitment team cast a wide net for participants. “The Hispanic community isn’t homogeneous,” says Lewis. “We wanted a mix of age, country of origin, language — Spanish as their first or second language — and geographic spread.” To uncover the differences and similarities between Hispanics and non-Hispanics, both groups were included in the study.

The project also zeroed in on key chronic conditions impacting Hispanics — diabetes, high cholesterol, rheumatoid arthritis, COPD, and erectile dysfunction.

Hispanics consider healthcare to be their number two priority — right after family.

METHODOLOGY

In early 2016, a total of 3,145 consumers — 2,015 Hispanics and 1,130 non-Hispanics — took the 45-minute survey, completing it online either at home or in person in five key markets — Los Angeles, New York, Miami, Chicago, and Houston. These markets were chosen owing both to their high density of Hispanics and to be sure that the total group reflected the composition of the U.S. Hispanic population.

Survey questions sought to determine the drivers, gaps, and barriers affecting Hispanics’ approaches to healthcare. They covered interactions with physicians, disease management, buying habits for prescrip-

tion drugs and over-the-counter products, information-seeking behavior, advertising awareness, and much more. The broad range of questions has yielded a wealth of information. “Because the sample size is so large,” says Lewis, “we can do a deep dive in many directions.”

KEY FINDINGS

Hispanics consider healthcare to be their number two priority — right after family. (Non-Hispanics ranked healthcare third, after family and financial security.) However, 43% of Hispanics feel overwhelmed when it comes to taking care of their health, and 45% do not consider their overall health to be “excellent” or “good.” In order to regain control, Hispanics proactively look for information to help them manage healthcare decisions for themselves and their families.

Hispanics rely on multiple sources for healthcare information. They value advice from their healthcare professionals, family, and friends. Hispanics also search online and get information from TV programming and advertisements.

Questions regarding brand preferences also yielded interesting results. For example, Hispanics are significantly more likely to prefer branded prescription medications compared to generics and are willing to push to get the brand they want. And compared to non-Hispanics, they are more likely to ask their doctor for a prescription medication they have seen or heard advertised.

“We encouraged Nielsen to explore consumer perceptions, brand emotional elements, and key behaviors that should be influenced by marketers in their efforts to better satisfy the needs of Hispanics,” points out Gutierrez. ■



“We encouraged Nielsen to explore consumer perceptions, brand emotional elements, and key behaviors.”

CARLOS GUTIERREZ
*MD, VP of Strategy and Insights,
Healthcare, Univision*

THE INFORMATION FLOW: HISPANIC HEALTH-SEEKING PATTERNS AND OPENNESS TO ADVERTISING

A comparison of health-seeking habits reveals key differences.

The study revealed that Hispanics are likely to believe that going to the doctor regularly is the best way to keep from getting sick. They are also likely to visit the doctor as soon as they feel ill.

“There are two ways to interpret that feedback,” says Gutierrez. “First, it’s good news that Hispanics are thinking more about healthcare. On the less positive side, even though access to healthcare is improving, they wait until they feel symptoms before going to the doctor.”

When asked to assess their own level of health, 45% of Hispanics reported that it’s neither excellent nor good, compared to 26% of non-Hispanics. Among those suffering from chronic conditions, Hispanics are even more likely than non-Hispanics to say their health is only fair or poor.

In an effort to improve their health, Hispanics actively seek out healthcare information. Those with chronic conditions are even more proactive than others. The gap between Hispanics and non-Hispanics is especially significant when it comes to COPD, with 91% of Hispanics actively seeking information, as opposed to 56% of non-Hispanics.

In terms of the kinds of information searched for, the study revealed notable differences. Both Hispanics and non-Hispanics look for how to manage their con-

dition and treatment options. However, Hispanics are more likely to search for the causes of their condition: 38% of Hispanics as opposed to 29% of non-Hispanics.

Where do they go for information? Like many non-Hispanics, Hispanics tend to rely on healthcare professionals and pharmacists. Family and friends play a larger role for them, as do health fairs and other community events. Hispanics are also likely to seek information through support groups.

More Hispanics than non-Hispanics look for healthcare information from TV programs (26% to 16%) and TV ads (36% to 19%). Indeed, 64% of Hispanics “find advertising about prescription medications



to be very informative,” as opposed to 41% of non-Hispanics. Notably, Hispanics are more than twice as likely as non-Hispanics to get healthcare information from a TV network or its website (76% to 35%).

Perhaps the most significant finding is the extent to which Hispanics prefer to have resources offered in Spanish. That holds true whether the information comes from their healthcare professional or via mass media or advertising. Spanish-language ads are likelier to capture their attention and to create a favorable brand opinion. ■



“Hispanics might be willing to go to the doctor to stay healthy, but they see being symptom-free as a sign of health.”

FELISHA LEWIS
VP, Healthcare Custom Insights,
Nielsen

Hispanics are nearly twice as likely as non-Hispanics to rely on TV advertisements for healthcare information.

“It’s good news that Hispanics are thinking more about healthcare.”

— Carlos Gutierrez, Univision

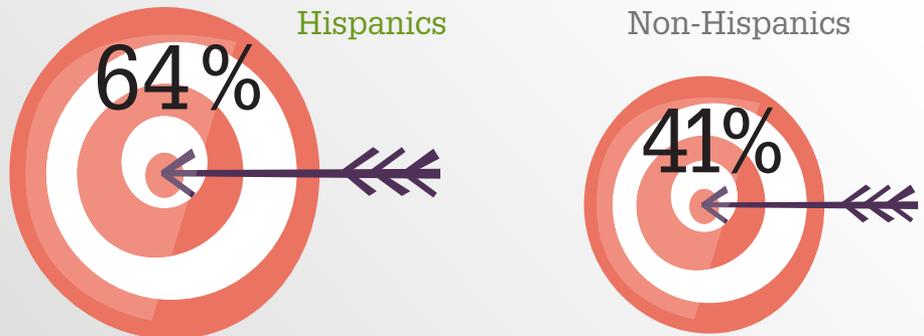
THE INFORMATION FLOW (CONT’D)

Nearly two-thirds of Hispanics find medical advertising informative and worthwhile

Rx ADVERTISING INFLUENCE

Hispanic consumers are more likely to find Rx advertising informative.

I find advertising about prescription medications to be very informative



Source: Univision/Nielsen Hispanic Healthcare Journey Study 2016

More than half of Hispanics respond more favorably to Spanish-language advertising

SPANISH ADS CREATE A STRONGER CONNECTION



59% agree ads in Spanish are more likely to capture my attention



57% find it easier to understand ads for prescription medications when they are in Spanish



52% have a more favorable opinion of a brand that advertises in Spanish

Source: Univision/Nielsen Hispanic Healthcare Journey Study 2016

DEEP DIVE ON DIABETES

Huge opportunities exist for improving Hispanic diagnosis and treatment through educational messaging.

The Diabetes Journey infographic (below) shows only a small portion of the study’s numerous findings about patients with this chronic condition. While there are many similarities between Hispanic and non-Hispanic patients, the differences can prove surprising.

For instance, on average, the time lag between symptoms and diagnosis is 12 months for Hispanics, but only six months for non-Hispanics. The study found that the delay in diagnosis was mainly due to a

misunderstanding of diabetes symptoms. Half of Hispanics didn’t know that their symptoms were due to a condition such as diabetes, and half thought that their symptoms would eventually go away.

Given the time lag, it’s not surprising that, on average, Hispanics have more severe diabetes at diagnosis. However, Hispanics tend to be more optimistic about managing their disease. Hispanic diabetes patients are more likely to believe they are treating their condition to the

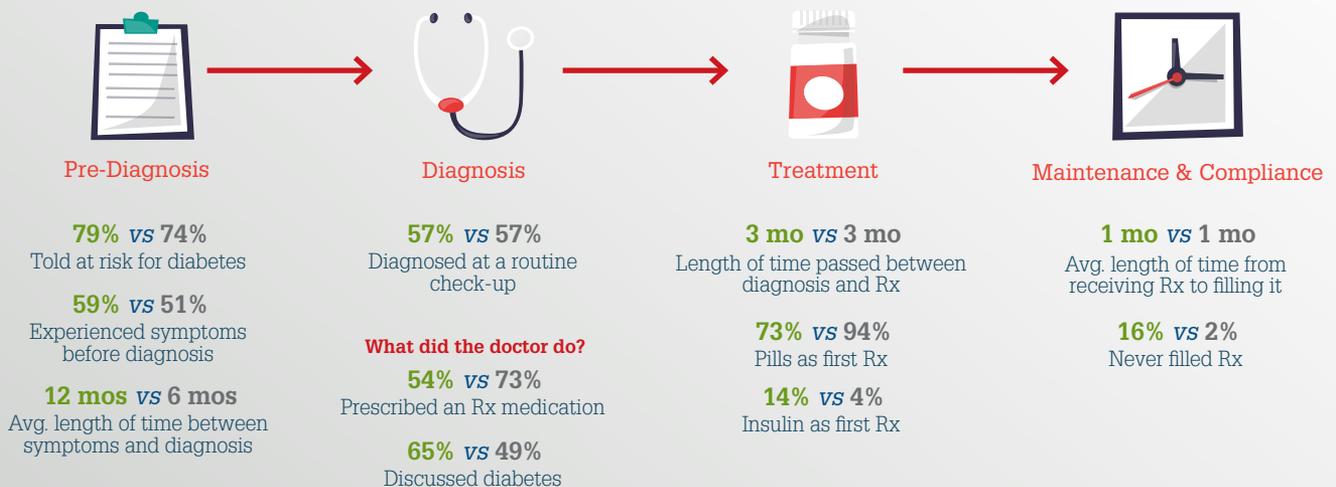
best of their ability (84% of Hispanics vs. 77% of non-Hispanics) and that their diabetes is currently well controlled (63% of Hispanics vs. 59% of non-Hispanics).

Perceptions, unfortunately, don’t always reflect reality. Overall, Hispanic diabetes patients had a higher average A1c, a measure of blood glucose levels, at their last doctor visit compared to non-Hispanic diabetes patients (8.7 vs. 6.9). This may be due to a lower level of adherence among Hispanics: 48% believe that “once I reach

DIABETES JOURNEY

Hispanics and non-Hispanics differ in time to diagnosis. Once diagnosed, however, diabetics generally follow the same path.

Hispanics vs Non-Hispanics



Source: Univision/Nielsen Hispanic Healthcare Journey Study 2016

Misperceptions Steer Behavior

Unfounded assumptions about the severity of diabetes are greater among Hispanics than non-Hispanics. The same is true of other chronic health conditions.

my blood sugar goal, I can stop taking my medication,” as opposed to 10% of non-Hispanics. Furthermore, 64% of Hispanics feel that “diabetes can be completely cured if I eat healthy,” compared to only 20% of non-Hispanics.

“A lack of understanding of clinical outcomes plays a role in low treatment adherence,” Gutierrez says. “After only three to four months, many people believe they’re cured and stop taking their medication. The complications that arise generally require treatment that generates higher costs, causing major problems to the healthcare system.”

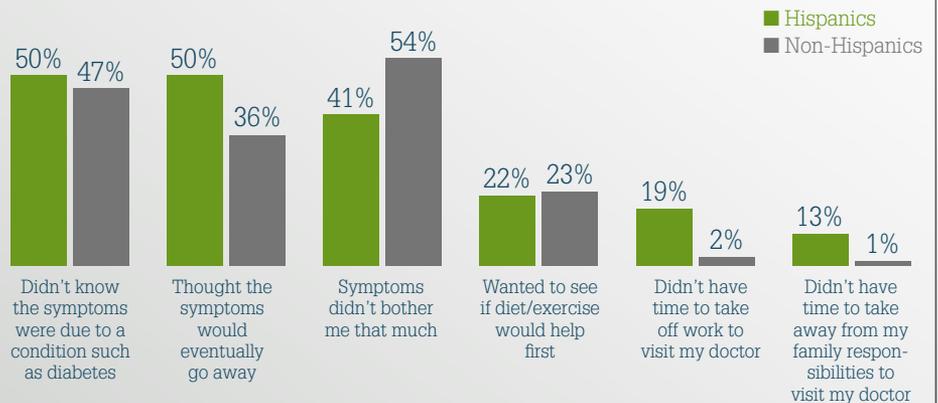
The study asked about topics that patients might recall discussing with their doctors — such as treatment goals and side effects — and their level of understanding of those discussions.

Only 49% of Hispanics said they understood their doctors’ communications about diabetes medication “very well,” versus 74% of non-Hispanics. Additionally, 45% of Hispanic diabetic patients feel information gets lost in translation if they speak to healthcare providers in English. Clearly, culturally relevant disease education and patient support are needed to counter early treatment termination. ■

A study published in *JAMA* September 2015 revealed that diabetes is twice as prevalent among Hispanics (22.6%) as among non-Hispanic whites (11.3%).

CAUSES FOR DELAYED DIAGNOSIS

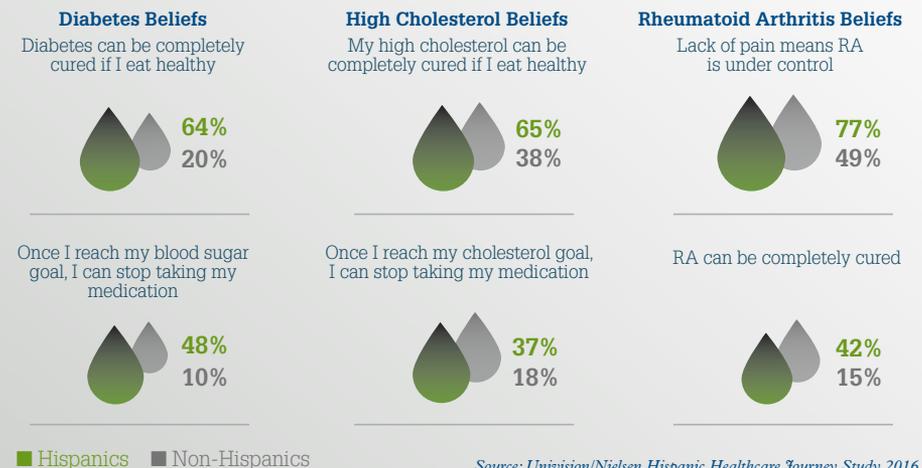
A misunderstanding of symptoms among Hispanic patients, as compared to non-Hispanic patients, can often lead to diagnosis delays. Below are six such reasons.



Source: Univision/Nielsen Hispanic Healthcare Journey Study 2016

DISEASE MISCONCEPTIONS

Some misconceptions around these chronic conditions persist more significantly among Hispanics compared to Non-Hispanics.



Source: Univision/Nielsen Hispanic Healthcare Journey Study 2016

NEXT STEPS: TIPS FOR CRAFTING CULTURALLY RELEVANT BRAND OUTREACH

Cultural awareness and communications in Spanish are among factors that best effect positive health outcomes.

Insights derived from this research should prove invaluable to those seeking information on the Hispanic healthcare consumer. Here are some key takeaways for healthcare marketers:

Hispanic consumers are actively seeking solutions to their health problems. “The road is open for marketers to offer education and build awareness for their brands,” Gutierrez says.

Hispanics prefer branded Rx medications. “They look for the best care they can get,” says Gutierrez. “They believe they’ll suffer fewer complications and reduce the overall cost of treatment if they’re taking the best prescription medications.”

The same is true of over-the-counter drugs. “Hispanics are generally less price-sensitive than non-Hispanics,” says Lewis. “They’re willing to pay a premium for that level of trust and perception of quality.”

Misperceptions about disease management and treatment still persist among Hispanics. They are prone to believe they can cease taking prescribed medication once the symptoms of a chronic disease have abated or they have met treatment goals. This presents an opportunity to reinforce the importance of adherence among Hispanic patients.

Educational materials in Spanish aren’t just about engagement and relevance, they’re about comprehension.

Spanish is key for capturing Hispanics’ attention and ensuring message comprehension. Hispanics prefer resources that allow them to receive information in Spanish and find it easier to understand conversations with their doctors and advertisements in Spanish.

COUNTERING COMMON MISPERCEPTIONS

Raising disease awareness through educational resources and advertising can have a positive effect on issues such as delaying the seeking of medical care and failure to adhere to a prescription regimen — especially if those materials are offered in Spanish.

“We need to convince all of the stakeholders — healthcare professionals, pharma companies, hospitals, insurers, and the media — to work together to increase disease awareness,” says Gutierrez. “Sending the message in Spanish language appears to be an important factor in optimizing communications.”

That’s because having educational materials in Spanish isn’t just about engagement and relevance, it’s about comprehension.

“People tend to think someone who has been living here for 10 years is fully acculturated,” says Lewis, “but even Hispanics fluent in English still find words they don’t understand. They’ll think, ‘This is medical language, so I need to see it in Spanish to make sure I fully understand.’”

KNOWING THE CULTURE

A grounding in the culture will help healthcare providers give patients more meaningful guidelines. For example, most diet-modification programs are geared to non-Hispanic whites. A doctor who is familiar with the foods typically eaten by



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VP, Healthcare Custom Insights,
Nielsen

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— Felisha Lewis, Nielsen

Hispanics is better able to help these patients manage their diet.

Hispanics are also more likely to manage their health and make decisions as a family. So, it’s important to engage not only Hispanic patients, but their familial support network as well.

THE POWER OF MASS MEDIA

This survey underscores just how active a roll mass media can play in providing

healthcare information to the Hispanic community.

“As part of Univision’s commitment to educating and empowering Hispanics, we encourage advertisers to invest in reaching out to Hispanics,” Gutierrez explains. “By communicating in Spanish and showing a full understanding of the cultural factors, they can help give patients the ability to handle their disease.” ■



“We need to convince all stakeholders to work together to increase disease awareness.”

CARLOS GUTIERREZ
MD, VP of Strategy and Insights,
Healthcare, Univision

Rx BRAND PREFERENCES

Hispanics are more likely to prefer branded products and to challenge their physicians if the doctor does not prescribe the brand requested.

I prefer branded prescription medications to generic prescription medications



44% Hispanics
22% Non-Hispanics

If my doctor does not prescribe a brand of medication I ask for, I will challenge him or her



39% Hispanics
25% Non-Hispanics

Source: Univision/Nielsen Hispanic Healthcare Journey Study 2016

Hispanics strongly prefer branded prescription medications and are willing to pay a premium for them



MORE THAN JUST AN AD

Hispanics are **56% more likely** than non-Hispanics to say that RX ads are a key source of information, and at least twice as likely to take action based on those ads.

HISPANIC HEALTHCARE JOURNEY

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To learn more about this valuable consumer visit:
www.Univision.net/hispanichealthcarejourney

Source: Univision/Nielsen Hispanic Healthcare Journey 2016