KANTAR



2021 MARS Consumer Health Study Directory

Inside, find details about the MARS 2021 study content. Data collected in the study can be used to identify target audiences, behaviors, attitudes, media usage, and demographics.

Updates to study content in 2021 are noted in blue text.

UNDERSTAND PEOPLE, INSPIRE GROWTH



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Conditions

CONDITIONS KEY

- Rx Condition Specific Prescription Drugs
- Condition Specific Non-Prescription Drugs
- At Risk For
- Satisfied with Rx Treatment
- Professionally Diagnosed
- Pain-Related Condition
- When First Diagnosed
- Severity: Mild/Moderate/Severe

Updates to study content in 2021 are noted in **blue** text

LAST 12 MONTHS/EVER

Acid Reflux/GERD Rx € *

Acne Rx 🗸 🚏

ADD/ADHD Rx *

Age Related Memory Loss (moderate or severe)

Allergies/Allergic Reaction Rx 🖋 🕆

- Food Allergy
- Grass Allergy

- Insect Allergy
- Pet Allergy
- Ragweed Allergy
- Tree Pollen Allergy

Anaphylaxis/Severe Allergy Rx **

Anemia 🌴

Anxiety (frequently felt anxious, nervous, or worried) Rx 🕆

Arthritis 😂 🌡

- ◆ Ankylosing Spondylitis Rx ♥ ↑
- Osteoarthritis/Degenerative arthritis Rx
- Psoriatic Arthritis Rx
- Rheumatoid Arthritis (RA) Rx ♥ I ✓ ↑ Z

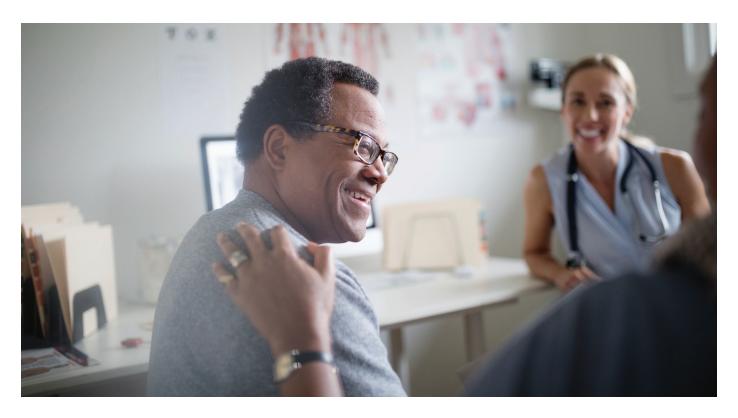
Asthma Rx ✓ ✓ 🕆 💈 🌡

Bipolar Disorder Rx ✓ 🕆 💈

Blood clots in the legs (DVT) or Pulmonary Embolism (PE) Rx 🖋 🕽 🍅

Cancer **! ✓**⊗ **∑**

- Breast Rx
- Colon/Colorectal
- Head and Neck (including mouth, nose and throat)
- Leukemia
- Liver
- Lung
- Non-Hodgkin's Lymphoma
- Ovarian



Cancer, continued ▮ ✔⊗ 🞖

- Pancreatic
- Prostate
- Skin
- Stomach
- Thyroid
- Urinary/Bladder/Kidney
- Uterine/Cervical

Cardiovascular/Heart Disease Rx 🖋 🕆 👢

- Acute Coronary Syndrome/Heart Attack
- Angina
- Atrial Fibrillation (A-Fib) or Arrhythmia
- Coronary Artery Disease/CAD (sometimes called "hardening" or "clogging" of the arteries)
- Other cardiovascular or heart disease

Cold Rx

Constipation/Irregularity (More than one episode)

COPD Rx ! V TE !

(including Chronic Bronchitis & Emphysema)

Cough Rx

Depression Rx I 🗸 🏗 🛭

Diabetes &

- Type 1 Rx ! ✓ *
- Type 2 Rx ! ✓ ↑ ≥

Diabetic Nerve Pain Rx ** (2)

Eczema/Atopic Dermatitis Rx 🗸 🕆 💈 🌡

Enlarged Prostate/Benign Prostate Hyperplasia 🥂 🕆

Erectile Difficulty (More than one episode) \mathbb{R}^{*}

Eye problems/Eye disease 🛚 🔗

- Cataracts **
- Dry Eye **
- Glaucoma **
- Macular Degeneration **

Fibromyalgia Rx ** 🙉 🞖

Flu Rx 🖋 🚏

Gout Rx ✔ 🏗 🗷 👢

Heartburn/Indigestion Rx

Hepatitis B 🚏

Hepatitis C Rx **

Herpes Rx **

High Cholesterol Rx I & ** HIV **✓** 🎌 Hyperhidrosis/Excessive Sweating ** Hypertension/High Blood Pressure Rx 🗸 🕆 Hypothyroidism/Low Thyroid Function Rx ** Inflammatory Bowel Disease (IBD) ◆ Crohn's Disease Rx ** ○ □ ◆ Ulcerative Colitis Rx ** (3) \$\begin{align*} \begin{align*} \begi Irritable Bowel Syndrome (IBS) Rx ✓ 🎓 Kidney Disease ! * Low Testosterone Rx ** Lupus ! ** 🙈 Migraine Headache Rx ♂ ✔ †* 🙁 🖫 Multiple Sclerosis Rx ** 😕 Obesity Rx ** Osteopenia 🏌 Osteoporosis Rx ! ** \bigs_ Overactive Bladder Rx ** Pain Rx 🔗 🌡 Back Head (other than headaches) Joint Muscle Neck Nerve Other Pneumonia 🛂 🚏 Post Traumatic Stress Disorder (PTSD) 🎓 Restless Leg Syndrome (RLS) (also called Willis Ekbom Disease) Rx ** 😕 Rosacea Rx 🗸 💎 Seizures/Epilepsy Rx ** Shingles Rx ! *®



Sleep-related Issues Rx 🖋

- Sleep Apnea (frequently gasp or stop breathing while asleep)
- Insomnia **

Stroke ! *

Urinary Tract Infection 🛂 🏗

Yeast Infection 🧷 🔭

Women's Health

- Endometriosis **
- Infertility **
- Menstrual Cramps/PMS Rx P 1
- Uterine Fibroids **
- Menopause Symptoms
 - Hot Flashes
 - Irregular Periods or Absence of Menstruation
 - Night Sweats
 - Painful Intercourse/Dyspareunia
 - Vaginal Atrophy or Dryness

ASKED ONLY AT FEEL AT RISK FOR QUESTION

Alzheimer's Disease

Sinus Headache/Sinus Congestion

Condition-Related Details

BLOOD CLOTS IN THE LEGS (DVT) OR PULMONARY EMBOLISM (PE)

Have ever experienced a pulmonary embolism (PE)

CANCER

Stage at the time of diagnosis Current stage of treatment Spread to other Locations

CONSTIPATION/IRREGULARITY

Caused by Prescription Medication Is it Chronic (<3 bowel movements/week)

DEPRESSION

Severity rating

- Mild I feel sad but it doesn't interrupt my daily activities of life
- Moderate I feel sad and lonely, and have long periods of time where I cannot perform normal, everyday functions of life
- Severe I have long periods of time where I simply lie in bed and don't interact with people, and cannot perform normal daily activities

DIABETES

Important features of glucose meter/monitoring system

- Alternate site testing
- Automatic coding of test strips
- Bluetooth capability
- Communicates wirelessly with insulin pump
- Compact size/portability
- Connects directly to my smartphone
- Continuous 24/7 monitoring
- No finger pricks
- Provides insights such as patterns, averages, or estimated HbA1C levels
- Results are uploaded automatically to share with doctor/other
- Single device monitors blood glucose AND blood pressure or blood ketone levels
- Syncs with fitness, diet or medication trackers/apps

Frequency of Daily Blood Glucose Meter Use

Hemoglobin A1C Level

Maintaining the Recommended A1C Level

Related Conditions/Complications

- Cardiovascular/ Heart Conditions
- DKA and Ketones
- Eye Conditions
- Foot Conditions
- Gastroparesis
- Hearing Impairment
- Hypertension/ High Blood Pressure
- Kidney Disease
- Skin Conditions
- Stroke

HIV

Has the disease progressed to AIDS

MIGRAINE HEADACHE

Episodic (occasional) or Chronic (15+ days/month)

PAIN

Interference with Ability to Sleep Is your pain a symptom of...

- Arthritis
- Cancer
- Crohn's disease
- Ulcerative colitis
- Blood clots in legs (DVT) or Pulmonary Embolism (PE)
- Diabetic Nerve Pain
- Fibromyalqia
- Gout
- Lupus
- Migraine Headache
- Multiple Sclerosis
- Restless Leg Syndrome (RLS)
- Shingles

PSORIASIS

Severity/Percent of body surface affected

- Mild Less than 3% body coverage
- Moderate 3% 10% body coverage
- Severe More than 10% body coverage

WOMEN'S HEALTH: PAINFUL INTERCOURSE/ DYSPAREUNIA OR VAGINAL ATROPHY/DRYNESS

Used an over-the-counter personal lubricant or vaginal moisturizer in last 12 months

Treatments

Treatments in bold make up the general treatment list for all conditions, while those that are not bold are specialty treatments associated with specific conditions.

- Non-Prescription Drugs
- Prescription Drugs
- Diet or Exercise
- Herbal or Home Remedy
- Vitamins/Supplements
- Biologics infusion/injection/oral
- Birth Control
- Blood Product Donation/Transfusion
- Chemotherapy
- Dialysis
- ImmunoOncology/Immunotherapy
- Immunotherapy (tablets or shots)
- Infusion Therapy
- Injections
- Inhaler
- Insulin
- Non-insulin Injectable
- Medical Marijuana
- Oral Medication
- Oral Hormone Therapy
- Oral Non-hormonal Treatment
- Oxygen Therapy

- Phototherapy
- Physical Therapy
- Psychological Therapy/Counseling
- Radiation
- Spinal Cord Stimulation
- Surgery
- Topical Medication
- Traditional Immunosuppressants
- Transdermal/Skin Patch, Spray or Gel
- Transplants
- Vaginal Estrogen Insert or Cream

Add-on Treatment: Would consider taking add-on Rx

Would consider using as a treatment

- Medical marijuana
- Cannabidiol/CBD (oil, cream, edibles, etc.)

Types of Vitamins/Mineral Supplements used

Reasons for using Vitamins/Mineral Supplements

- Additional nutrients
- Bone health
- Digestive health
- Healthy aging
- Heart health
- Immune health
- Increased energy
- Joint health
- Overall health/wellness benefits
- Prenatal health
- Weight management



Women's Health

Methods of birth control used in last 12 months

- Abstinence
- Barrier methods (e.g., condoms, diaphragm)
- Fertility awareness (e.g., temperature method)
- Long-term methods (e.g., implant, IUD, patch)
- Oral contraceptives/birth control pills
- Permanent procedures (e.g., tubal ligation)
- Withdrawal method

Most important factor when choosing a birth control

- Advice from friends or family
- Convenience (e.g., easy to use)
- Cost
- Health benefits (e.g., reduced risk of STD's)
- How effective it is (risk of pregnancy)
- How long it lasts or how easily it can be reversed
- It's my partner's preferred method
- Religious or cultural beliefs
- Side effects

Birth control brands/products used in last 12 months

Long-term methods of birth control used

- Implant
- IUD
- Patch
- Ring
- Shot

Health Insurance

Type of health insurance coverage

- Employer or union provided
- Government issued for low income people (Medicaid)
- Government issued for retiree (Medicare)
- Health insurance marketplace/exchange (Affordable Care Act)
- Military or other Government employee
- Private (self-pay) insurance
- No insurance

Type of Medicaid or Medicare plan

- Managed care My choice of healthcare providers is limited to those who are in network
- Fee for service I can choose any healthcare provider who accepts Medicaid or Medicare

Information Sources

PUBLICATIONS

- Health-related publications
- Magazine ads
- Magazine articles
- Magazine websites
- Magazines in the Sunday newspaper
- Newspaper ads
- Newspaper articles
- Newspaper websites

ONLINE

- Association/non-profit websites
- Diet or Fitness websites
- Drug company/brand websites
- Drug review/ratings websites
- Email newsletters
- General news websites
- Government websites
- Health information websites
- Insurance provider websites
- Online advertisements
- Online communities or support groups
- Online videos (e.g., YouTube)
- Search engine results
- Social networking sites
- Websites dedicated to a particular health condition

TELEVISION

- Television programs
- Television advertisements

POINT OF CARE

- Alternative/holistic medical practitioners
- Doctor
- Nurse/Physician Assistant
- Pharmacists
- Brochures, posters, other health education materials in a doctor's office/waiting room
- Digital educational materials provided by a doctor (e.g., video links, digital brochures)
- General magazines in a doctor's office/waiting room
- Health-related magazines in a doctor's office/waiting room
- Health-related television programming in a doctor's office/waiting room
- Tablet computer in the exam room

POINT OF PURCHASE

- Ads/brochures/magazines in pharmacies
- In-store radio, TV or video
- Medication packaging/labels

OTHER

- Condition or health-related events (such as seminars, classes, expos, etc.)
- Direct mail
- Friends or family
- Posters/wallboards at gyms or health clubs
- Printed newsletters

All information sources are ranked on a four point value scale: very much, somewhat, not very much, not at all.

Magazines

MAGAZINES

- AARP The Magazine
- Allrecipes Magazine
- Allure
- The American Legion Magazine
- Architectural Digest
- Better Homes and Gardens
- Bloomberg Businessweek
- Bon Appétit
- Car and Driver
- Condé Nast Traveler
- Cooking with Paula Deen
- Cosmopolitan
- Country Living
- Diabetes Forecast*
- Diabetic Living*
- EatingWell
- The Economist
- Elle
- Entertainment Weekly
- Esquire
- Essence
- The Family Handyman
- First for Women
- Food & Wine
- Food Network Magazine
- Forbes
- Fortune
- Golf Digest
- Golf Magazine
- Good Housekeeping
- GQ
- Guideposts
- Harper's Bazaar
- Health
- HGTV Magazine
- House Beautiful

- In Touch
- InStyle
- Marie Claire
- Martha Stewart Living
- Men's Health
- Midwest Living
- National Geographic
- The New Yorker
- OK!
- Parents
- People
- People en Español
- Popular Mechanics
- Prevention
- Psychology Today
- Reader's Digest
- Real Simple
- Rolling Stone
- The Saturday Evening Post*
- Scientific American
- Shape
- Smithsonian
- Southern Living
- Sports Illustrated
- Star*
- Sunset
- Taste of Home
- This Old House
- Time
- Travel + Leisure
- TV Guide Magazine
- Us Weekly
- Vanity Fair
- Vogue
- WebMD Magazine**
- Wired

- Woman's Day
- Woman's WorldWomen's Health

Magazine metrics include print estimated audiences, combination print or digital estimated audiences, average monthly reach for websites, frequency for print issue readership and website visitation.

- *Magazine website reach and frequency data not reported. Only print and digital audience, and print frequency are available for these publications.
- **WebMD.com visitation measured/ reported with Internet & Website Usage



Newspapers

How often read/look at newspaper Number of newspapers read/looked at in last 7 days

Radio, Streaming Music and Podcasts

Time spent listening to radio, including streaming radio, music or podcasts

Listening via AM/FM/Satellite/Internet/Apps

Radio/Music/Podcast streaming services used

- Amazon Music (Unlimited or Prime)
- Apple Music
- iHeartRadio
- Pandora
- SiriusXM
- Spotify

Television

Devices used to watch TV

- Desktop or laptop PC
- Gaming Console
- Smartphone
- Streaming device
- Tablet
- Television
- Smart TV/Internet-enabled TV

Types of TV watched and Proportion of time spent watching each type in a typical week (0%-100%)

- Antenna/'over the air' live broadcast
- Cable/satellite/telephone service live broadcast
- Recorded TV/DVR
- Streaming services/Video on Demand

Weekday/Weekend Viewing by Daypart (adjusted based on time zone)

- 6AM to 9AM
- 9AM to 6PM
- 6PM to 8PM
- 8PM to 11PM
- 11PM to 1:30AM
- 1:30AM to 6AM

TELEVISION GENRES

- Animation/Cartoons Daytime
- Animation Evening
- Award Ceremony
- Comedy Dramedy/Other
- Comedy Sitcom
- Comedy Variety
- Cooking
- Court Shows
- Dramas/Soaps Daytime
- Drama
- Crime Drama
- True Crime/Crime Documentary
- Faith-based/Religious
- Financial News
- Game Shows Daytime
- Game Shows Evening
- Health
- Home/Garden Improvements
- Home Shopping
- Movies
- Music
- News Celebrity Gossip/Entertainment
- News Morning News Shows
- News Evening newscasts between 4pm-7pm
- News Other Local/National/World
- News Magazine
- Reality Competition
- Reality Other
- Sci-Fi/Fantasy
- Superhero
- Supernatural/Horror
- Self Improvement or Makeover
- Spanish Language
- Sports Event
- Sports: Non Live Event
- Talk/Conversation Daytime
- Talk/Variety Late Night
- Travel

Streaming services/apps used in the last month

- Amazon Prime Video
- Apple TV+
- AT&T TV Now (formerly Direct TV Now)
- CBS All Access
- Crackle
- Disney+
- HBO/HBO Max
- Hulu
- Netflix
- Peacock
- Showtime
- Sports streaming channels or major league apps
- YouTube TV (includes access to live and cable TV content)

Tendency to watch programming with commercials vs. commercial-free

Tendency to watch on demand (streaming/VoD/DVR) vs. live TV (OTA/cable)

TELEVISION SPORTS PROGRAMS

- Auto racing Formula 1
- Auto racing NASCAR
- College Baseball
- College Basketball
- College Football
- Esports (e.g., League of Legends, Fortnite)
- Extreme Sports (e.g., BMX)
- Figure Skating
- Golf
- Horse Racing
- MLB Baseball
- NBA Basketball
- NFL Football
- NHL Hockey
- Professional Boxing
- Soccer
- Tennis
- Track & Field

Sports programs are selected if watched regularly during the last season.

TELEVISION NETWORKS

- A&E
- ABC
- Adult Swim
- AHC (American Heroes Channel)
- AMC
- Animal Planet
- BBC America
- BET
- Bravo
- Cartoon Network
- CBS
- CMT
- CNBC
- CNN
- Comedy Central
- Cooking Channel
- The CW
- Discovery Channel
- Discovery Life Channel
- E!
- ESPN (e.g., ESPN, ESPN2, ESPNNews)
- Food Network
- FOX
- FOX News Channel
- FOX Sports (e.g., FS1, FS2)
- Freeform
- FX
- GSN
- Hallmark Channel
- Hallmark Movies & Mysteries
- HGTV
- History
- HLN
- ID (Investigation Discovery)
- INSP
- ION Television

- Lifetime
- LMN (formerly Lifetime Movies)
- MeTV
- MSNBC
- MTV
- National Geographic
- NBC
- NBCSN
- NFL Network
- Nick @ Nite
- OWN (Oprah Winfrey Network)
- Oxygen
- Paramount Network
- PBS
- Science
- Syfy
- TBS
- Telemundo
- TLC
- TNT
- Travel Channel
- truTV
- TV Land
- Univision
- USA Network
- VH1
- WE tv
- The Weather Channel
- WGN America

For both television genres and television networks, respondents are asked to identify what they have watched in the last seven days.

Internet & Websites/Apps

Dayparts and time spent online

Frequency of Internet use for health & wellness

- More often than once a day
- Once a day
- 4-6 times a week
- 2-3 times a week
- Once a week
- 2-3 times a month
- Once a month or less
- Never

WEBSITES/APPS

- Amazon
- CDC
- Cooking Light
- Delish
- Drugs.com
- Everyday Health
- Facebook
- Glamour
- GoodRx
- Google
- Healthcare.gov
- Health Central
- Healthgrades
- Healthline
- HelloGiggles
- Instagram
- LinkedIn
- Livestrong.com
- Mayo Clinic
- Medical News Today
- MedicineNet.com
- Medscape
- NIH.gov
- Pinterest
- Reddit
- Self
- Sharecare
- Snapchat
- TikTok

- Tumblr
- Twitter
- Verywell health
- WebMD
- Wikipedia
- Yahoo!
- YouTube

Websites/Apps are measured by use in the last six months and by frequency of visits to each site/app.

Device Ownership & Online Behavior

Devices own or regularly use

- Desktop/Laptop PC
- Gaming Console
- Cell Phone
- Smartphone
- Streaming device
- Tablet
- Television
- Smart TV/Internet-enabled TV
- Smart speaker (e.g., Amazon Echo, Google Home)
- Wearable fitness tracker: smartwatch, activity band or clip-on

Smart speaker use

- Ask general questions s or play games (e.g., sports scores, history, trivia, jokes, etc.)
- Ask health-related questions (e.g., find a doctor or clinic, how to treat a condition, etc.)
- Check the weather
- Follow the news
- Listen to music, streaming radio, audiobooks, or podcasts
- Make calls
- Online shopping
- Set general reminders/alarms
- Set health-related reminders (e.g., take medication, refill prescriptions, doctor appointments)
- Smart home commands (e.g., control lights, security, thermostat)

MOBILE & SOCIAL MEDIA

Time spent online using a mobile device (smartphone or tablet)

Time spent on social media

MOBILE APP TYPES

HEALTH CONDITIONS

- Blood sugar or diabetes
- Health testing/tracking tools (e.g., blood pressure)
- Specific ailment education or support
- Symptom checker

DIET & EXERCISE

- Calorie counter/Diet tracker
- Exercise/Fitness
- Healthy recipes/Nutrition

MEDICAL PROFESSIONALS & INSURANCE

- Doctor locator
- Medical records access
- Insurance provider
- Pharmacy/ER/Fast clinic locator

MEDICATION

- Drug or general health reference tool
- Pill reminder/Medication tracker

GENERAL HEALTH/WELLNESS

- Sleep tracker
- Stress/Relaxation/Meditation

ONLINE ACTIVITIES

GENERAL

- Caught up on local news
- Caught up on national news/politics
- Caught up on sports news
- Caught up on celebrity news/gossip
- Caught up or post on a social network
- Checked the weather
- Listened to or viewed podcasts
- Used a voice assistant on your mobile device (e.g., Siri, Google Assistant)
- Watched video clips (e.g., YouTube)

CONDITION OR TREATMENT-RELATED

- Looked for alternative (non-medical) treatments or home remedies
- Looked for information about a particular health condition
- Researched or read reviews of medications or types of treatments
- Researched symptoms I/someone else was experiencing
- Looked for other opinions/options after a doctor's diagnosis or treatment advice

DOCTORS AND HEALTH SERVICES

- Looked for a doctor
- Looked for information about pharmacies, hospitals, treatment centers, urgent care or surgery centers
- Read reviews of doctors or other healthcare professionals
- Scheduled an appointment with a healthcare professional
- Used a patient portal to access electronic medical records (e.g., MyChart)

SHOPPING

- Compared prices of medications or other health products or services
- Purchased an at-home medical testing kit (e.g., food sensitivity, STD, COVID-19)
- Purchased medications or other health products or services
- Refilled a prescription online

INTERNET, SOCIAL MEDIA AND LIFESTYLE

- Looked for healthy recipes or other healthy lifestyle information
- Read about others' experiences with conditions, medications or treatments
- Participated in virtual workout or fitness sessions (e.g., Peloton, Zoom workout class, YouTube exercise video)
- Tracked my diet/exercise
- Watched online videos to learn more about symptoms, conditions or treatments

Respondents are asked to identify what devices (desktop/laptop PC, tablet, smartphone) they use for all online activities.

Medical Professionals & Services

RELATIONSHIP WITH PRIMARY CARE PHYSICIAN

HEALTHCARE PROFESSIONALS

- Acupuncture/Acupressure Practitioner
- Allergist
- Cardiologist
- Chiropractor
- Dentist/Oral Hygienist
- Dermatologist
- Diabetes Educator/Specialist
- Ear, Nose & Throat Specialist
- Endocrinologist
- Gastroenterologist
- Gynecologist
- Hematologist
- Nephrologist
- Neurologist
- Nurse Practitioner/Physician Assistant
- Nutritionist
- Obstetrician
- Oncologist
- Ophthalmologist
- Optometrist
- Orthopedist
- Pain Specialist
- Physical Therapist/Sports Medicine
- Podiatrist
- Primary Care Doctor
- Psychiatrist
- Psychologist/Therapist
- Pulmonologist
- Rheumatologist
- Surgeon Cosmetic/Plastic
- Surgeon Other
- Urologist

HEALTHCARE FACILITIES/SERVICES

- Doctor's office (private or group practice)
- Emergency Room
- Hospital
- Infusion Center
- Retail Health or In-store Clinic
- Surgery Center
- Urgent or Immediate Care Center
- Outpatient or Specialized Care Clinic
- Telemedicine/Virtual or Online Doctor Visit (using a smartphone, tablet or computer)

TELEMEDICINE

Reasons used telemedicine in the last 12 months Most likely reasons to use in the future

- Counseling/therapy session
- Discuss non-urgent concerns about an existing condition or treatment plan
- Discuss test or lab results
- Follow-up appointment after a procedure or surgery
- Get a new prescription
- Renew/refill a prescription
- Looking for a diagnosis for symptoms I was experiencing
- Referral for a specialist
- Routine visit or annual check-up
- Urgent care
- Other purpose

ACTIONS TAKEN AFTER SEEING PROFESSIONALS

- Conducted an online search about a condition
- Conducted an online search about a drug or treatment options
- Filled a prescription
- Looked into alternative treatments after receiving prescription
- Looked up cost of medication or insurance coverage before filling a prescription
- Made an effort to eat healthier or exercise more
- Received a prescription for a new drug
- Signed up for a prescription savings program I saw or heard about at my doctor's office or pharmacy
- Switched to a different prescription
- Took medication as prescribed
- Visited a pharmaceutical company or drug brand website
- Visited a social media site related to condition or prescribed treatment
- Went for x-rays, medical tests, or vaccines
- Went to see a specialist

Both healthcare professionals and healthcare facilities/services are measured by frequency of visits over the last 12 months (1 time, 2–3 times, 4–6 times, 7 or more times).

COVID-19 Insights

ATTITUDES & OPINIONS

- COVID-19 has made me fearful of visiting my doctor in person
- I rely on my doctor more as a result of COVID-19
- I worry that my underlying condition increases my risk for COVID-19
- Coronavirus news reports have made me more anxious
- I am confident I won't get sick with COVID-19 if I take precautions
- Until a vaccination is available to everyone, I will continue social distancing

ACTIONS TAKEN AS A RESULT OF COVID-19

- Avoiding going to the ER or urgent care center
- Delaying an elective procedure or surgery
- Delaying routine doctor visits or annual check-ups
- Putting off seeking diagnosis or treatment for non-COVID-19 symptoms
- Increasing my use of online resources to manage my condition
- Looking for ways to reduce stress (e.g., meditation, exercise, art/music, etc.)
- Ordering medications online that I previously filled in person
- Stockpiling prescription refills or other medications
- Taking the recommended safety precautions to prevent infection/spread (e.g., frequent hand washing, wearing a mask, social distancing, etc.)

MEDICAL TESTS

- COVID-19 <u>antibody</u> test
- COVID-19 virus test

Medical Tests & Vaccinations

Importance of regular medical check-ups

Most recent annual physical

- 6 months ago or less
- 6 months to 1 year
- 1 year to 2 years
- 2 years to 3 years
- 3 years to 5 years
- More than 5 years ago
- Never Been

MEDICAL TESTS

- Allergy (skin or blood test)
- Blood glucose
- Bone density
- Cardiac/heart tests (e.g., EKG, stress test, etc.)
- Cholesterol
- Colonoscopy
- CT scan
- Diabetic Retinopathy
- Glaucoma
- HIV
- Kidney function
- Mammogram
- Pap smear
- Pregnancy
- Prostate Exam
- Prostate Specific Antigen (PSA)
- STD/STI (e.g., chlamydia, genital herpes, HPV)

VACCINES

- Flu
- Hepatitis
- HPV
- Meningitis
- Pneumonia
- Shingles
- Whooping cough

Both medical tests and vaccines are measured over a 12 month period.

Purchasing Medication

Number of prescription medications filled for self

- None
- 1 to 2
- 3 to 5
- 6 to 9
- 10 or more

HOW PURCHASED RX DRUGS

- A prescription assistance program from a drug brand
- A prescription drug plan separate from my health insurance
- A prescription savings program discount card/mobile app (e.g., GoodRx, SingleCare, CVS Reduced Rx)
- Brand-specific coupons, rebates or loyalty cards
- I pay for all prescriptions myself because I have no prescription coverage
- I usually pay for prescriptions myself because my plan has a high deductible
- Medicare Prescription Drug Plan
- Prescriptions are included in my health insurance plan

WHERE PURCHASED MEDICATION (Rx or OTC)

- Club Store (e.g., Costco, Sam's Club, BJ's)
- Club Store's website
- Drug Store Chain (e.g., Rite Aid, Walgreens, CVS)
- Drug Store Chain's website
- Local Non-chain Drug Store
- Mass Merchandiser (e.g., Walmart, Target)
- Mass Merchandiser's website
- Grocery Store
- Health/Natural Food Store
- Amazon.com
- Online pharmacy
- Mail order pharmacy provided by your insurance
- Online purchase (Net)

Medication purchasing is measured over a 12 month period.

Overall Health & Wellness

HEALTH STATUS

Current health status

Excellent/Very good/Good/Fair/Poor

Health compared to a year ago

 Much better/Somewhat better/About the same/ Somewhat worse/Much worse

STRESS LEVEL

Current stress level

 Very stressed/Somewhat stressed/Not very stressed/Not at all stressed

Stress level compared to a year ago

 Much higher/Somewhat higher/About the same/ Somewhat lower/Much lower

OUTLOOK & CONTROL OVER HEALTH

Outlook regarding future health

 Very optimistic/Somewhat optimistic/Neutral/ Somewhat pessimistic/Very pessimistic

Personal control over health

 Complete control/Mostly in control/Some control/Little or no control

MOTIVATION FOR IMPROVING HEALTH

How much do each of these motivate you to maintain or improve your health (scale question)

- To live a long life
- To look good

Health Lifestyles

DIET & EXERCISE

Frequency of exercise

Barriers to a regular exercise program

Body mass index

Evaluation of the diet at home in terms of health and wellness

Overall level of concern regarding the healthiness of the diet

Reasons for managing diet/nutrition

Types of foods eaten on diet/nutrition plan

- Fat free
- Gluten free
- Grain free
- High fiber/whole grain
- High protein
- Lactose free
- Low calorie
- Low carbohydrate
- Low cholesterol
- Low fat
- Low sodium
- Natural or organic
- Nutritional drinks/shakes (e.g., Boost, Glucerna)
- Probiotic
- Raw food
- Sugar free
- Vegetarian
- Vegan

Weight loss goal

Weight loss programs used

- Doctor-created
- Self-created
- Non-prescription weight loss drugs
- Low carbohydrate/high protein or fat (e.g., Atkins, Ketogenic, Paleo, South Beach)
- Points- or calorie-based nutrition program (e.g., WW, Noom)
- Prepared meal plan (e.g., Jenny Craig, NutriSystem)
- Other weight loss program

TOBACCO USE AND CESSATION METHODS

Tobacco use on a regular basis Packs smoked in the last 7 days

Have you ever tried to quit smoking/using tobacco

Healthcare Advertising

WHERE SEEN/HEARD

- Direct mail
- In a doctor's office
- In a pharmacy
- In a magazine
- In a newspaper (daily or weekend)
- On television
- On the Internet
- On a mobile device (smartphone or tablet)
- On social media
- On the radio
- On a smart speaker (e.g., Amazon Echo, Google Home)
- Outdoors (e.g., billboards)
- Somewhere else

ACTIONS TAKEN AS A RESULT

- Asked your doctor for a product sample of a prescription drug
- Asked your doctor to prescribe a specific drug
- Called a toll free number to get additional information
- Conducted an online search
- Consulted a pharmacist
- Discussed an ad with a friend or relative
- Discussed an ad with your doctor
- Downloaded an app
- Made an appointment to see a doctor
- Purchased a non-prescription product
- Referred to a book, journal or magazine for additional information
- Refilled a prescription
- Signed up for a mail/email list to receive more information
- Switched to a different brand
- Took medication
- Used a coupon
- Visited a pharmaceutical company's website
- Visited some other website
- Watched a video online

Caregivers & Family Members

HEALTH CONDITIONS

- Acne
- Acute Coronary Syndrome/Heart Attack
- ADD/ADHD
- Age Related Memory Loss (moderate or severe)
- Alzheimer's/Dementia
- Allergies
- Anaphylaxis/Severe Allergy
- Osteoarthritis/Degenerative arthritis
- Rheumatoid Arthritis (RA)
- Asthma
- Autism
- Bipolar Disorder
- Cancer
- Chronic Pain
- COPD (Including Chronic Bronchitis and Emphysema)
- Depression
- Diabetes
- Eczema/Atopic Dermatitis
- Enlarged Prostate
- Eye problems/Eye disease (Including Cataracts, Glaucoma, and Other Eye/Vision Problems)
- Heart Disease
- Hepatitis C
- High Cholesterol/High Triglycerides
- Hypertension/High Blood Pressure
- Multiple Sclerosis
- Nutritional Deficiency
- Obesity
- Parkinson's Disease
- Psoriasis
- Seizures/Epilepsy
- Schizophrenia
- Shingles
- Stroke

CAREGIVER SUPPORT ACTIVITIES

- Administer or monitor medications
- Arrange for outside services
- Assist with daily household chores
- Assist with personal care (e.g., bathing, dressing, eating)
- Buy medication or refill prescriptions
- Discuss conditions or treatments with their doctor
- Encourage doctor visits
- Make doctor appointments
- Make sure vaccines are received
- Manage finances or provide financial support
- Monitor state of condition
- Provide transportation to doctor/medical treatment
- Research health information

Caregiver in same household

Caregiver level of involvement in medical decisions

- Very involved
- Somewhat involved
- Not very involved
- Not at all involved

Caregivers identify the conditions and ages of family members for whom they provide support.

Attitudes & Opinions

ANTI-AGING

Everyone should just age naturally

I feel younger than other people my age

I spend a lot of money on beauty and skincare products

I would consider cosmetic surgery for myself, now or in the future

I would consider non-surgical cosmetic treatments or procedures (botox, fillers, laser treatments, peels, coolsculpting, body contouring, etc.)

CHILDREN'S HEALTH

As a preventative measure it is important my children take vitamins every day

I actively participate in decisions regarding the types of vaccines my children receive

I always take my child to the doctor when he/she is sick

I trust my doctor to be cautious about over-prescribing medications for my children

I will only buy the brands of medicine recommended by my child's doctor

When a prescription drug becomes available as an over-the-counter medication, I will switch my children to the over-the-counter version

The benefits of having my children immunized outweigh the risks

DIET & EXERCISE

Diet plans usually work for me

Exercise is important to my diet and nutrition plan

I can't seem to adhere to a diet plan and often "cheat" when I'm on one

I diet to look good more than I diet to feel good Weight loss surgery is an option for me

DOCTORS/TREATMENTS

I am willing to ask my doctor for a prescription medication or drug sample that I have seen or heard advertised

I often discuss new prescription medicines with my doctor

Normally, I only use drug brands that are recommended by my physician

I always do what my doctor tells me to do

I research treatment options on my own and then ask my doctor about them

I do not seek help from doctors or nurses unless I am very sick or injured

The convenience of using telemedicine is more important than seeing my doctor face-to-face

DRUGS

I am hesitant to take prescription drugs with side effects that concern me

I am willing to pay extra for prescription drugs not covered by health insurance

I prefer to try OTC remedies before seeking prescriptions

I sometimes stop taking a prescribed medication without consulting a doctor

I will try another drug brand if I get a coupon for it

I dislike needles too much to consider a drug treatment that uses injections

It is very important that my health insurance covers all my prescription medication

It's worth paying more for branded prescription medications rather than getting generic products

Non-prescription medicines are safer than prescription medicines

Non-prescription store brand drugs work as well as national advertised brands

Prescription drugs are more effective than non-prescription remedies

HEALTH INSURANCE

The high cost of healthcare prevents me from being as healthy as I would like

I'm willing to pay more for high quality health insurance

HEALTHCARE ADVERTISING

Friends come to me for advice about healthcare and medications

I always read the small print in magazine/newspaper pharmaceutical ads

I trust pharmaceutical companies that advertise the medications I take

I trust the opinions of my family and friends about health-related issues

Pharmaceutical advertisements make me more knowledgeable about medicines

The pharmaceutical healthcare information at my doctor's office is credible and useful

MOBILE HEALTH & WEARABLES

I believe there are mobile apps available that would improve my current health

I would be willing to use a mobile app offered by my insurance health plan

I would be willing to use a mobile app recommended to me by my doctor

I prefer using apps instead of websites when I want health-related information or tools

I believe a wearable fitness tracker that connects to my mobile device or the internet would make it easier to track my diet and exercise

Using an app to share my personal health/fitness data with my doctor or others would motivate me

I am concerned about my personal health and fitness data being securely stored online

Web-connected devices are too complicated to use

ONLINE HEALTH

I am comfortable registering on a website which consistently offers useful information about my particular health condition

I am more comfortable talking about health and wellness concerns online than I am face-to-face

I am more likely to visit a health website that was recommended by my doctor or that I saw in my doctor's office

I am very cautious about which websites I access for health and wellness information

I feel health and wellness advertising on the Internet is trustworthy

I feel the Internet is a good way to confirm a diagnosis

I refer my friends to certain websites I find helpful

I typically conduct research online prior to a doctor's appointment

I trust the medical information other people share on social media

Researching online gives me confidence to speak knowledgeably about a medical condition

The Internet is the first source I turn to when researching health and wellness

PERSONAL HEALTH

I am concerned that my unhealthy habits will soon catch up with me

I do everything I can to promote and maintain my personal health and wellness

I always try to eat healthy foods and maintain a balanced diet

I am better informed about my health than most people

I believe that vitamins and nutritional supplements make a difference in long-term health

I participate in preventative healthcare

I prefer alternative/holistic approaches to standard medical practices

I research healthcare information so that I am better informed about different healthcare treatment options

My condition makes it difficult to do/complete day-to-day tasks

VACCINES

I am willing to ask my doctor for a vaccine that I have seen or heard advertised

I trust my doctor to recommend the vaccines that are essential to my continued health

I am first among my peers to investigate vaccines that are recommended but not required

I am concerned about the possible side effects related to my vaccinations

Sports & Leisure Activities

- Adult education courses
- Aerobics
- Attend concerts/Live events
- Attend professional/college sports events
- Baseball/Softball
- Basketball
- Bicycling
- Bird watching
- Bowling
- Cooking for fun
- Crossword puzzles/word games
- Dancing
- Entertaining friends/family
- Fantasy sports league
- Fine dining/eating out
- Fishing
- Fitness walking
- Football
- Gardening
- Go to bars/Nightclubs
- Go to the movies
- Golf
- Hiking
- Hunting
- Photography
- Play a musical instrument
- Poker
- Reading books
- Running/Jogging
- Sailing/Water Skiing
- Shopping for fun
- Snow Skiing/Snowboarding
- Soccer
- Spa Services
- Spend time with pets
- Swimming

- Tennis
- Travel
- Use a health club/gym
- Video gaming
- Visit museums
- Volunteer your time
- Weight training
- Yoga/Pilates

Demographics

Age

Gender

Education

Employment Status

LGBT

Marital Status

Number of Adults in Household

Parent/Children in Household

Household Income

Personal Income

Race/Ethnicity

- White
- Spanish/Hispanic/Latino
- American Indian or Alaska Native
- Black or African American
- Asian or Pacific Islander
- Other Race

Spanish Language

- Only Spanish at home
- Mostly Spanish, but some English
- Spanish and English about equally at home
- Mostly English, but some Spanish
- Only English at home

Extend your planning and reach your target audience segments

300+ predefined audience segments from the MARS Consumer Health Study are available via LiveRamp, Tru Optik and Eyeota to most major programmatic platforms for activation.

Visit <u>https://www.kantar.com/north-america/campaigns/audiences-for-activation</u> for more information about our off-the-shelf segments or contact us to help onboard your custom targets.

KANTAR

2021 MARS Consumer Health Study

Since 2001, the MARS Consumer Health Study has been the go-to information source for ad agencies, pharmaceutical marketers, and media companies seeking stable and reliable media and healthcare data that is projectable to the U.S. population. No other study provides this level of data and a 360 degree view of your target patient groups.

Features of the 2021 MARS Study include:

- 100+ health conditions, including 20+ low-incidence ailments (e.g., Crohn's, Lupus, MS): Ailment-specific follow-up questions capture condition details, treatment options and drug brand usage
- 500+ Rx and over-the-counter remedies
- Caregivers: Caregiver support activities, medical decision involvement, conditions of those receiving care, etc.
- Extensive Point of Care coverage: HCPs and medical services used, actions taken after seeing HCP, medical testing and vaccinations
- Special content available with the 2021 MARS release: COVID-19 insights including attitudes, behaviors, use of telemedicine and medical testing related to the COVID-19 outbreak
- 75 publications
- Newspaper readers: How often read, how many read in past week
- Radio & streaming music: Time spent, ways typically listen (AM/FM, satellite, internet), streaming services used
- Television coverage: Dayparts and time spent watching, network and genre coverage, services and devices used (including streaming)

- Digital insights: Online activities and device use, dayparts, website visitation for 35+ sites (including social, health-related, others), health-related mobile app use, time spent online with mobile and social media, and more
- Media effectiveness insights: Where consumers encounter healthcare advertising and actions taken as a result
- 40+ healthcare information sources: Value of various point of care, point of purchase, media and other sources for health information
- 70+ attitudes and opinions toward healthcare advertising, doctors and treatments, online and mobile health, diet and exercise, children's health, and more
- Extensive demographic data: Geographic information, gender, age, generation, race, marital status, education employment, income
- Solutions for targeting key consumer healthcare audiences: MARS Patient, Sources Valued, and Health Tech IQ Segmentations

If you have any questions or would like to learn more about the study, please contact:

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