

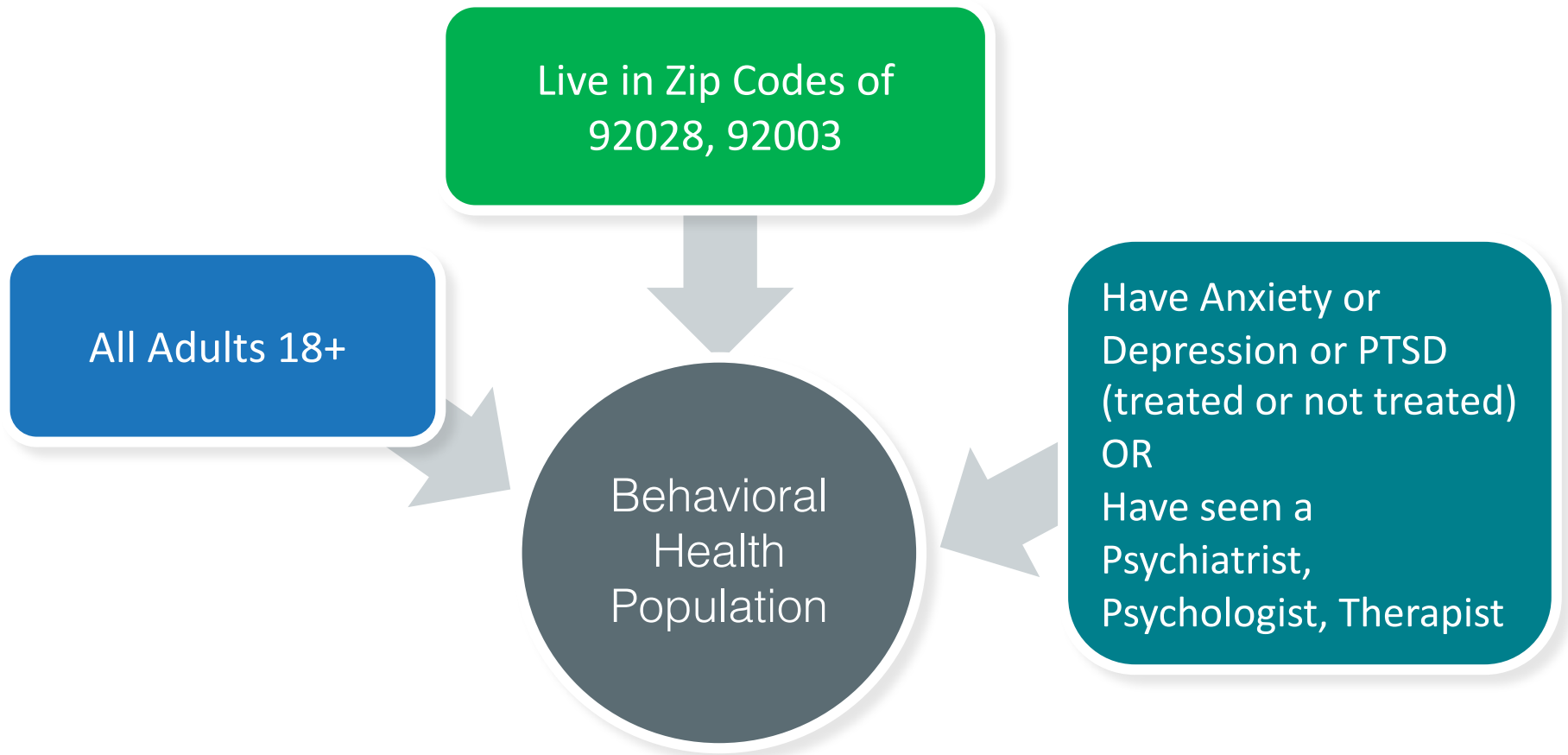


# Behavioral Health Population Engagement & Media



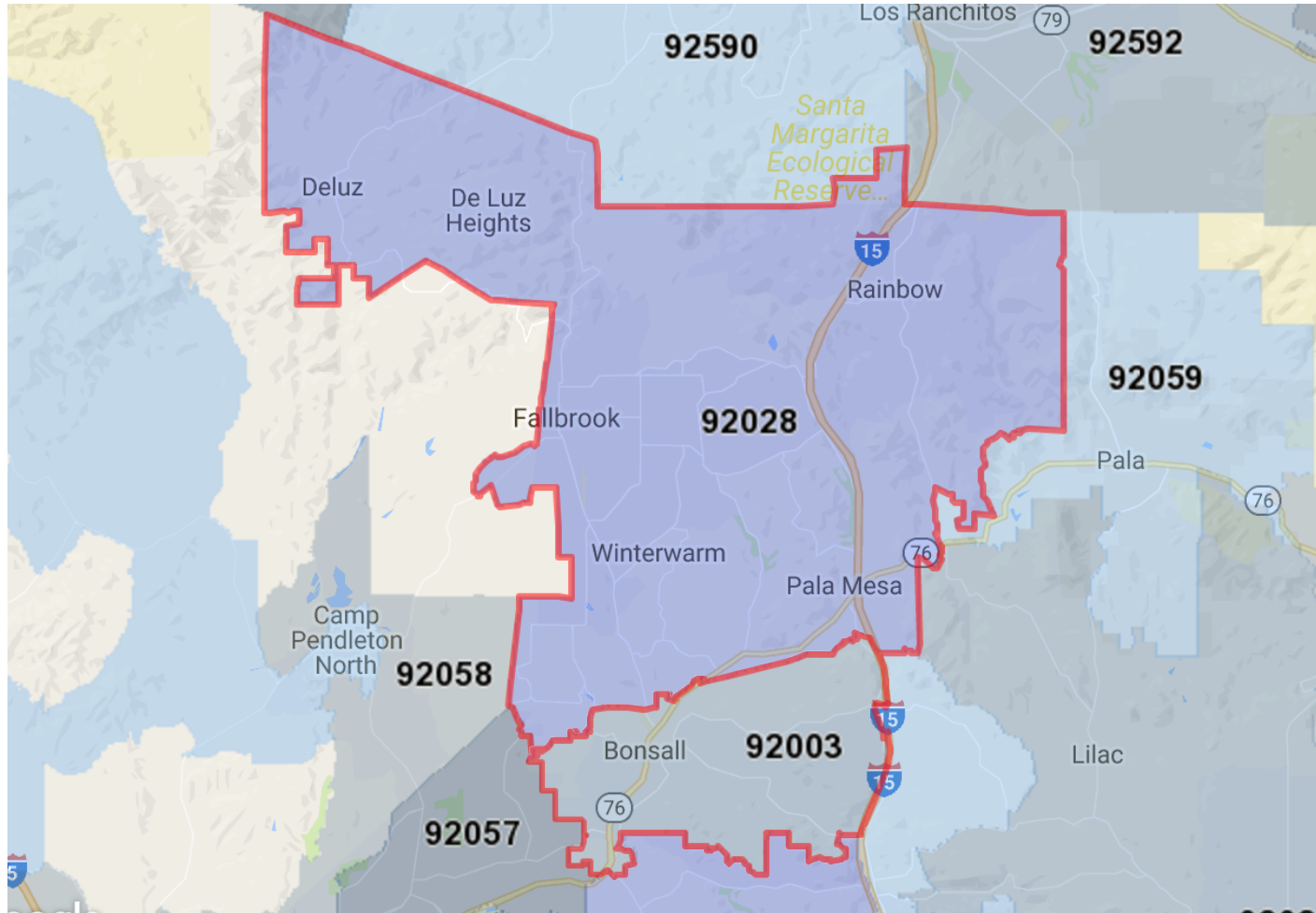
# Behavioral Health Population

## Population Definition



# Geography

## Zip Codes 92028 and 92003





## Behavioral Health Population **Engagement & Media**

**The Internet is their “go-to” for finding information quickly.**

Researching their conditions online gives them the confidence to speak to medical professionals about them. Social networks, including Facebook, Pinterest and reading blogs, are also places where they can research and view their social world without having to leave the couch.

**21% spend 20 hours or more per week browsing the internet.**

## BEHAVIORAL HEALTH POPULATION

# Health Information Services and Advertising

- Beyond their physicians, the first place the **Fallbrook Behavioral Health Population** looks for health information is the internet. This is a Population that **typically spends 10 or more hours per week online**, and certainly a portion of that time is spent exploring healthcare conditions and information.
- In fact, **19% say the internet is a good place to confirm a diagnosis**. **55.8%** say the internet provides a wealth of resources and information when searching for health and wellness information.
- Although family and friends are not their primary sources for healthcare information, **48.6% say they trust the opinions of family and friends on healthcare matters**. Additionally, **20%** of the Population say friends and family come to them for advice on healthcare.
- Healthcare sources of personal value include doctors, nurses/physician assistants, pharmacists, medical journals and health information websites.

## BEHAVIORAL HEALTH POPULATION

# Health Information Services and Advertising

- The top places they have seen or heard healthcare advertisements include television, the internet, doctor's offices, the pharmacy and on the radio.
- **27.7% do not recall seeing or hearing any healthcare advertising.** After viewing a healthcare advertisement, 9.3% were motivated to conduct an online search, 7.5% called in for a prescription refill and 5.7% discussed an advertisement with their physician. In comparison, the overall population saw 7.3% conduct an online search, 4.6% call for a prescription refill and 2.5% discuss an ad with their doctor.
- While this Population may feel that advertising is a waste of time and doesn't help them make decisions when purchasing, **the reality is that advertising impacts their decisions.** They take action, talk about them and 22.6% even feel that healthcare advertising on the internet is trustworthy versus 13.4% of the overall population.

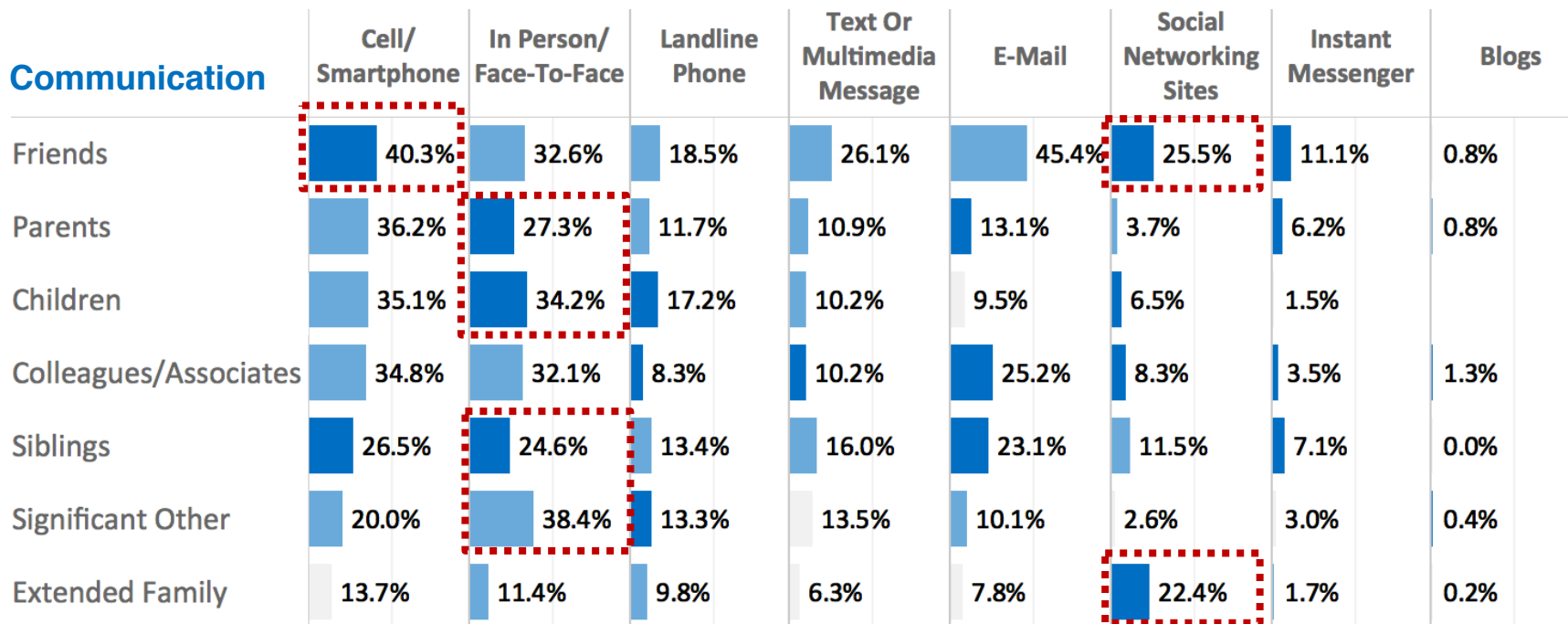
## BEHAVIORAL HEALTH POPULATION

# Communication and Information Sources

- If this Population were stranded on a desert island, the one item they would bring along would be their smartphones. **They can do everything with a smartphone**—watch TV, read, order deliveries from Amazon and stay in contact with their circle of friends. The versatility and connectivity of the smartphone helps it land as the top ranked form of communication for this population.
- After cellphones, **email and text messages are the next best forms of communication** for this Population. The 41% of the Population who are in the over 50 age bracket help the landline telephone round out the top four most important methods of communication, with 36.1% of the Population preferring a landline. Only 26.2% of the overall population say a landline is of high importance when communicating.
- Less important forms of communication include video calls, blogs, image-sharing websites and video streaming.
- Although smartphones are the top source of communication, **the best way for this Population to receive information is via email**. 45.7% of the population rank email as of high importance for information. Other high importance sources of information include cable television, cellphones, text messages and broadcast television networks. The nightly news is certainly an opportunity to communicate with this Population!

# ENGAGEMENT & MEDIA

## Communication



Overall the Behavioral Health Population communicates similar to the rest of the community with some exceptions

They are average text-ers and prefer face-to-face communication to members of their family and stay in contact with friends through social media sites and cellphones

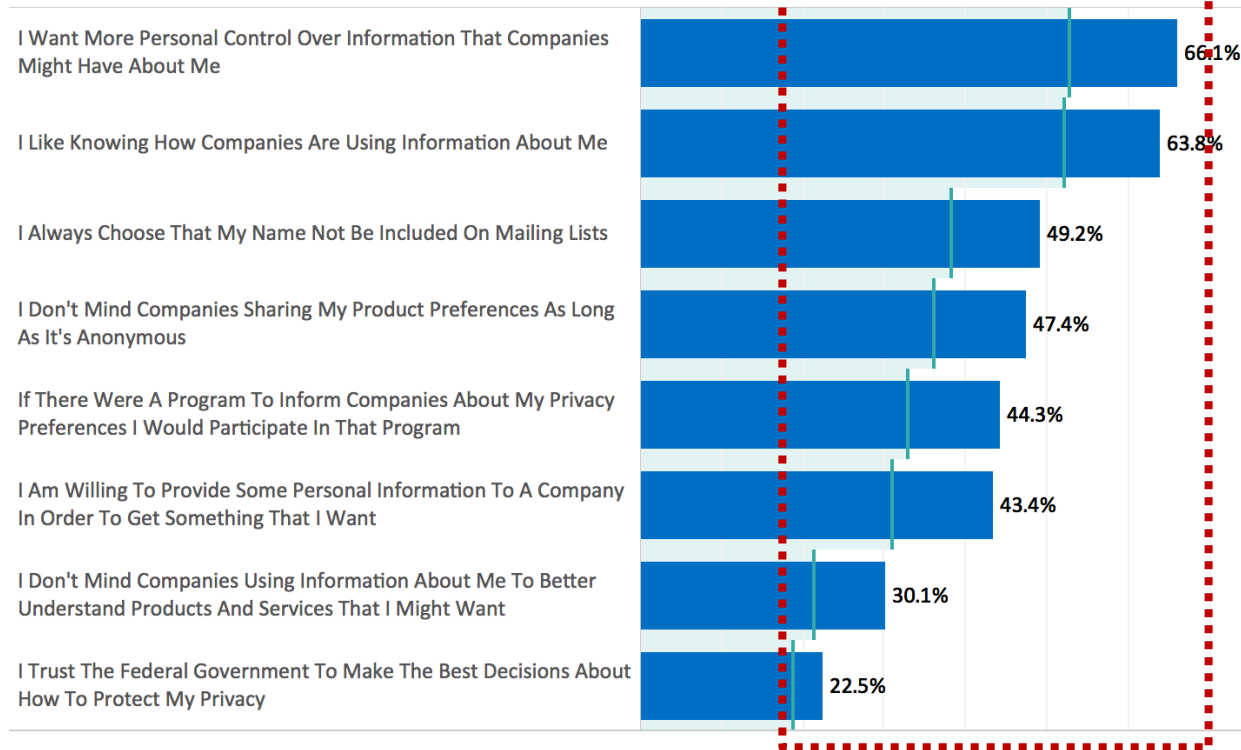
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# ENGAGEMENT & MEDIA

## Consumer Privacy

### Consumer Privacy Attitudes



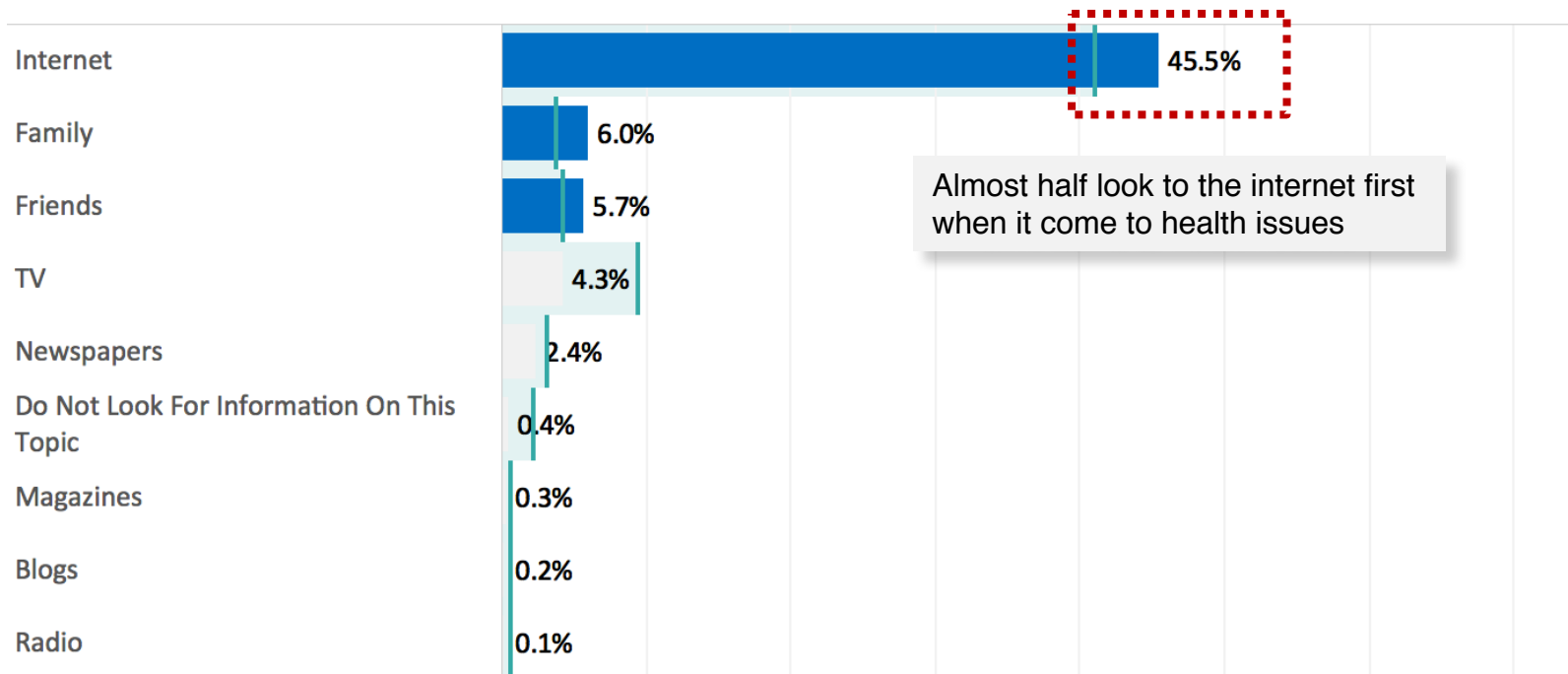
On every privacy question, this Population index higher – protecting their privacy is important to them

Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## Health Information Sources

### First Place I Look for Healthcare



Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## Health Information Sources

### Healthcare Information Attitudes

I Trust The Opinions Of My Family And Friends About Health Related Issues



More Likely To Visit A Health Website That Was Recommended By Doctor/Saw In Doctor's Office



Online Videos Help Me Understand Complicated Subjects



More Comfortable Talking About Health And Wellness Concerns Online Than Face-To-Face



### Information Gathering

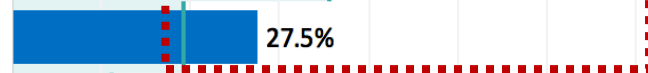
I Gather Health Information From My Doctor



I Gather Health Information From Websites



I Gather Health Information From Newsletters



I Gather Health Information From The Library



The Behavioral Health Population trusts the health opinions of their friends and family more likely than the rest of the overall population

Almost a quarter feel comfortable talking about health online more than face to face - opening an opportunity for telehealth.



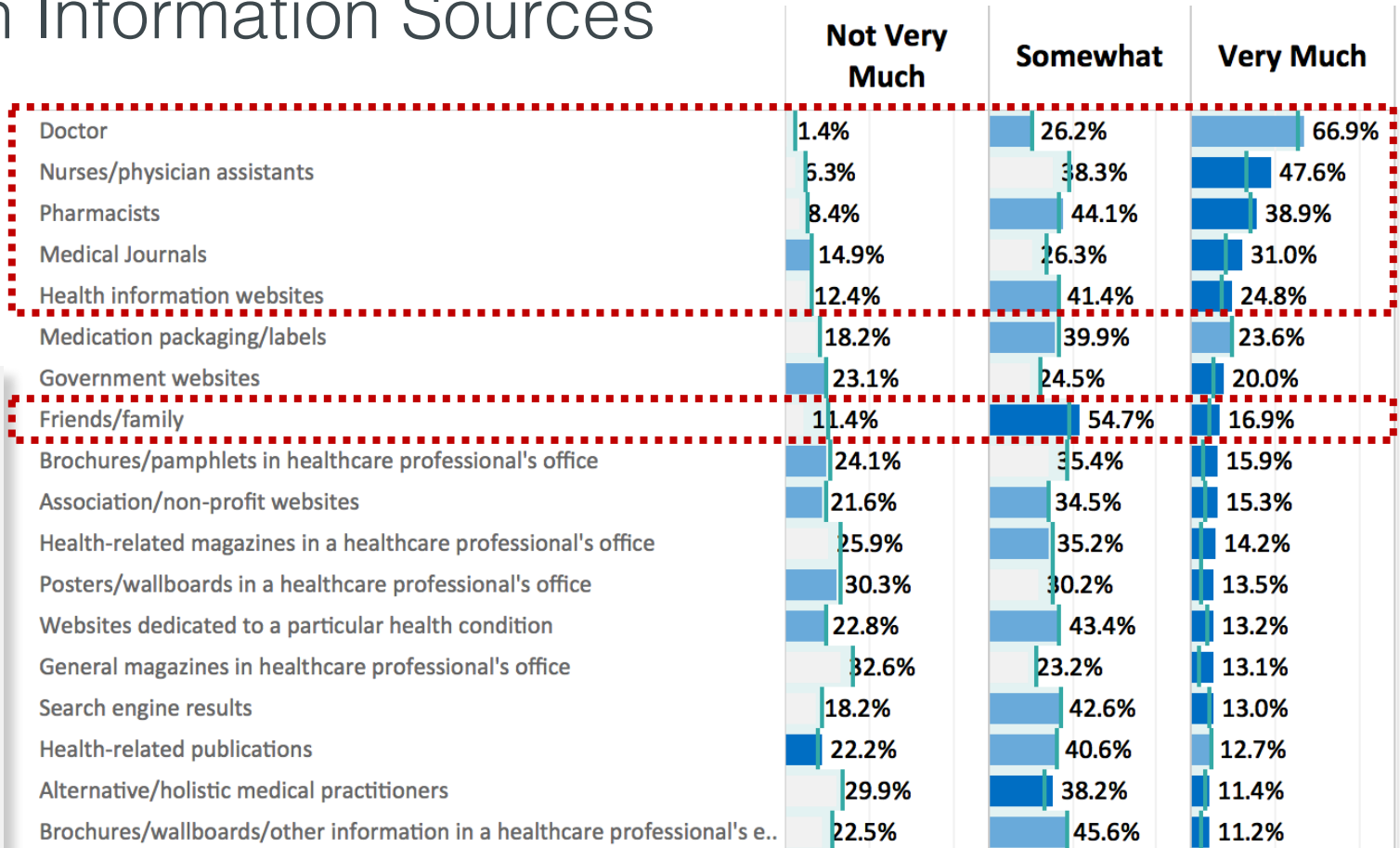
# ENGAGEMENT & MEDIA

## Health Information Sources

### Personal Value of Healthcare Sources

This Population very much values: Doctor, Nurses/PA's, Pharmacists, Medical Journals and Health Info Websites

But also looks to family and friends for their healthcare information

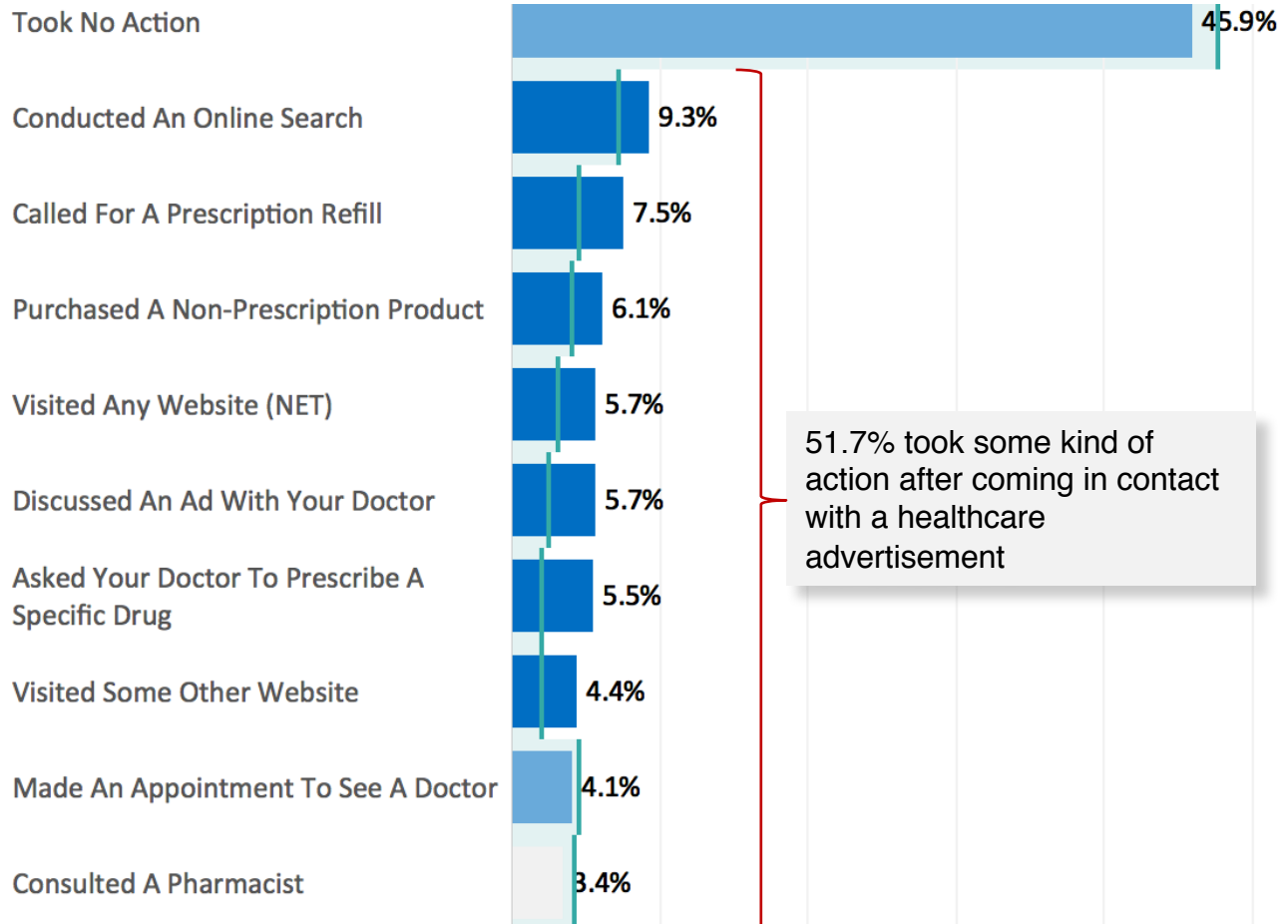


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# ENGAGEMENT & MEDIA

## Healthcare Advertising

### Actions Taken in the Past 12 Months due to Healthcare Advertisement

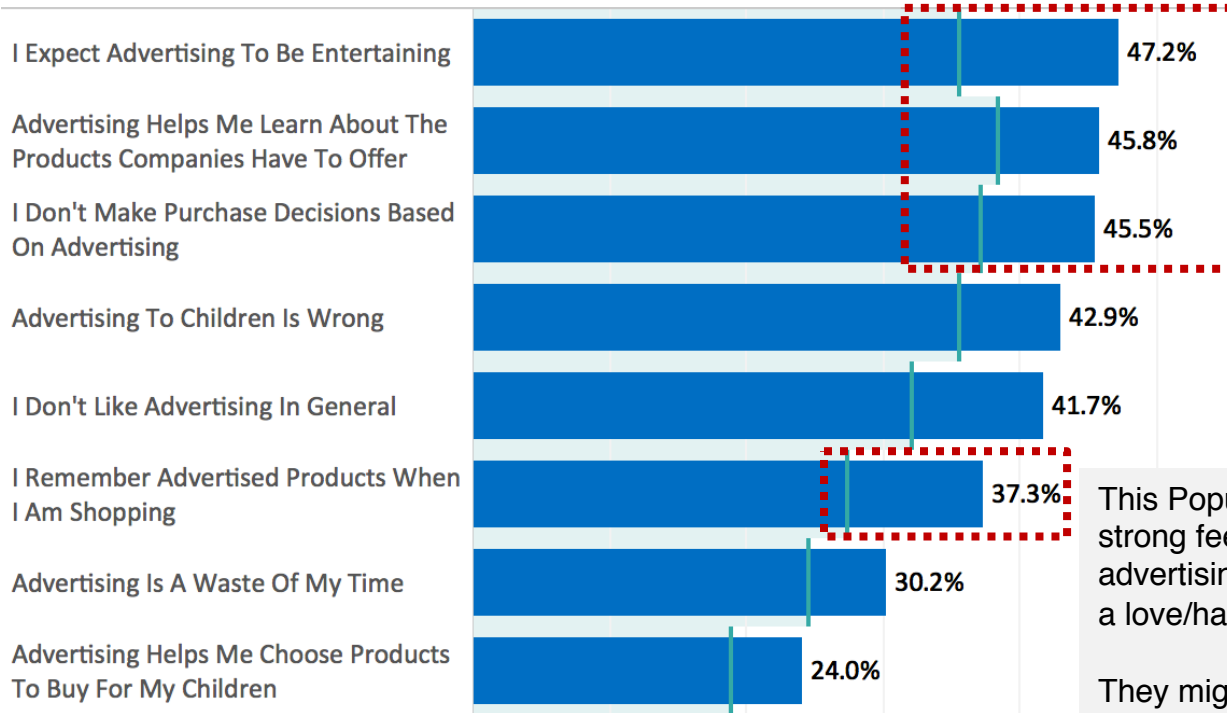


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# ENGAGEMENT & MEDIA

## Healthcare Advertising

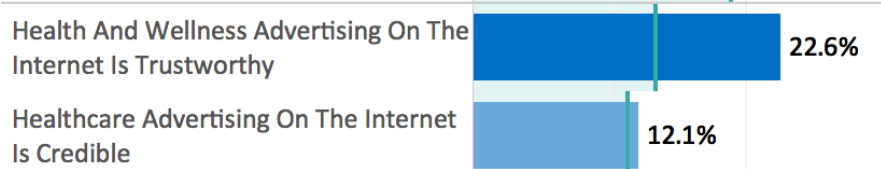
### Advertising Attitudes



This Population has strong feelings about advertising – a little of a love/hate relationship

They might not trust advertising but they like to be entertained by ads and admit that ads help them learn about products

### Healthcare Information Attitudes

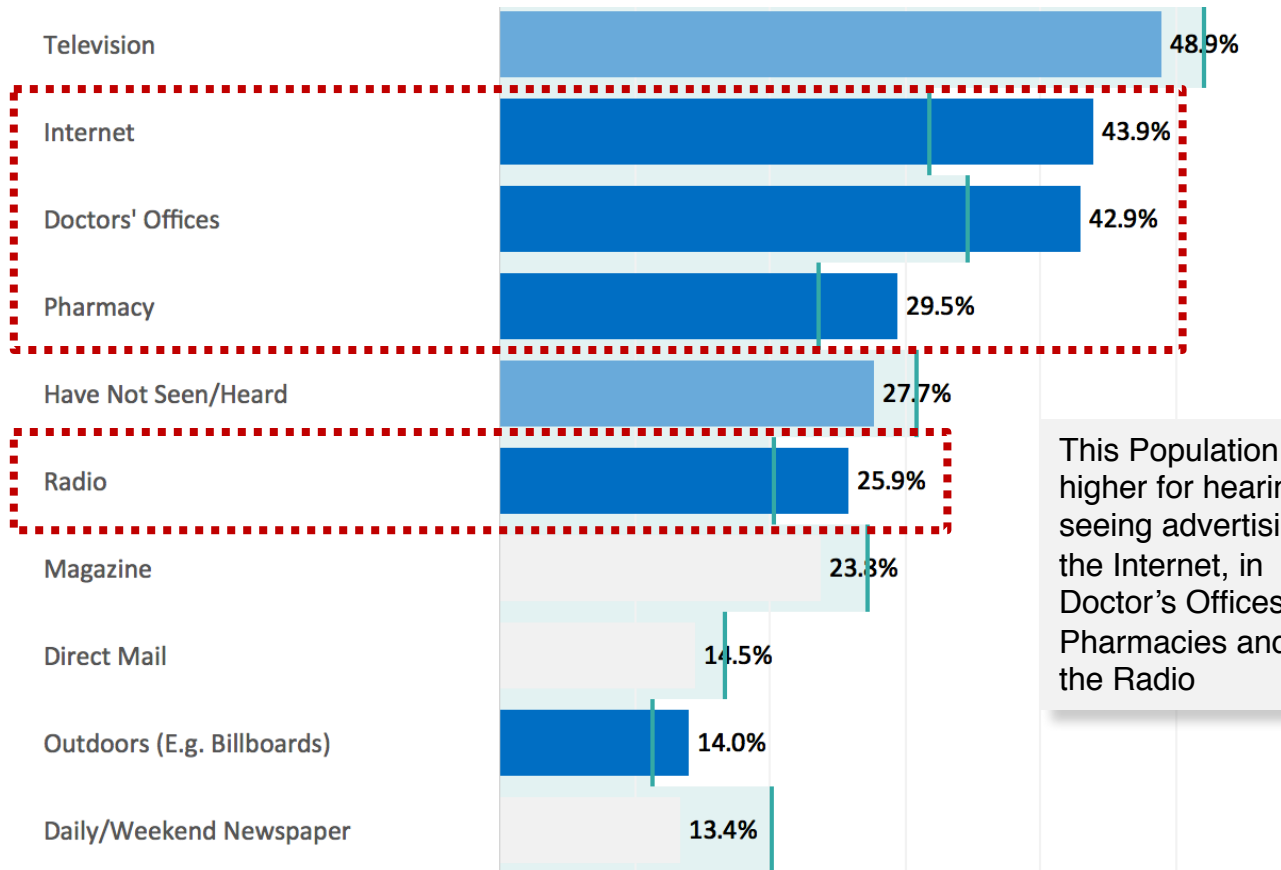


Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## Healthcare Advertising

Place Saw or Heard Healthcare Advertisement



This Population index higher for hearing or seeing advertising on the Internet, in Doctor's Offices and Pharmacies and on the Radio

Less Likely Equally Likely More Likely

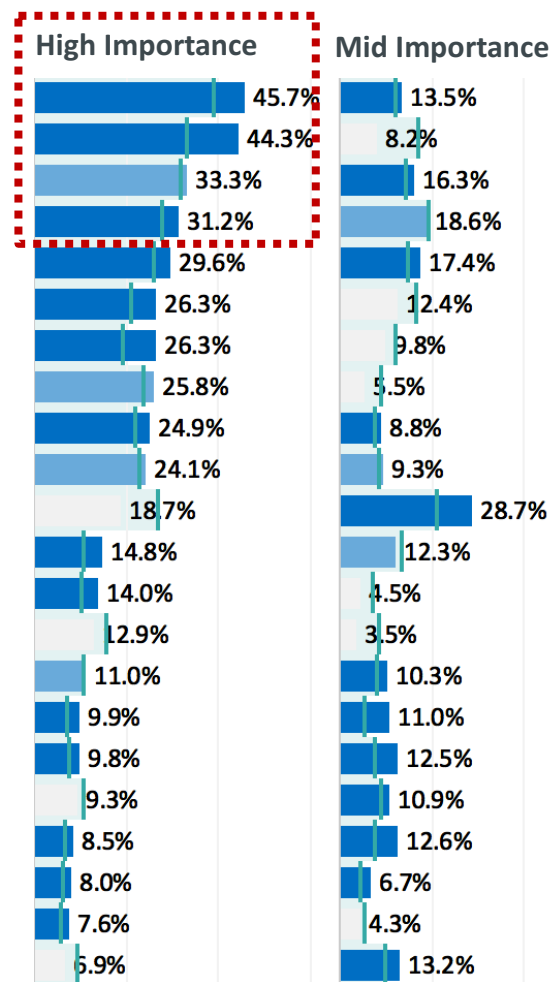
# ENGAGEMENT & MEDIA

## Media Source Importance

### Information Source

This Behavioral Health Population places a high importance on Emails, Cable TV, Mobile Phones and Text Messages in that order

- E-Mail
- Cable Television Network
- Cell/Smartphone
- Text Messages
- Broadcast Television Networks
- Print Magazines
- Landline Telephone
- Print Newspapers
- Social networking sites
- Newspaper websites
- AM/FM Radio
- Video Sharing Websites
- Photo Sharing Websites
- Satellite Radio
- Multimedia Message
- Phone/Video Calls Made Thru Computer
- TV Programs Online
- Magazine websites
- Instant Messenger
- Online Forums/Message Boards
- Professional Networking Websites
- TV Network or Program Websites



Less Likely Equally Likely More Likely



## BEHAVIORAL HEALTH POPULATION

# Online & Technology

- This Population is **technologically savvy**, with 70% owning a laptop and 60% owning a tablet.
- From shopping to streaming, the web is the “go-to” resource in their daily lives. In fact, **61% turn to the internet first when they need information**. Google is their preferred site for internet exploration, with 82% logging on to the site over the past week. Websites that show them local information are always a plus.
- For 67.9% of the Population, the internet has changed the way they get information compared to 54.8% of the overall population. Additionally, 60.6% say the web has changed the way they spend their free time versus 45.6% of the overall population. 36.6% even say the web has changed the way they work.
- Purchasing flights to visit their parents, ordering cleaning supplies for the house and getting lost in an article about a favorite television show are all activities you can expect this Population to engage in online. **If it can be done on the web, they’ll do it.**

## BEHAVIORAL HEALTH POPULATION

# Online & Technology

- Perhaps then, it's not surprising to learn that the Fallbrook **Behavioral Health Population spends less time reading newspapers in print, watching TV on televisions** and listening to terrestrial radio because of the web. **37%** say they mostly stream or download music or television for entertainment and **40% feel the internet is their prime source of entertainment.**
- **The introverted side of the Population definitely comes out online**—46% rely on the web to communicate with friends and family. However, the connectivity can come with a downside, with 48% saying, at times, they need to disconnect.
- **24% spend 20 or more hours per week browsing the web** and 21% say they need to be connected to the web from the moment they wake up until they put their phones on their bedside tables at night.
- **Email is mostly used for work**, but they also enjoy emails as a source of information. In fact, 20% say they like to receive newsletters highlighting new products and services from organizations over email.

## BEHAVIORAL HEALTH POPULATION

# Online & Technology

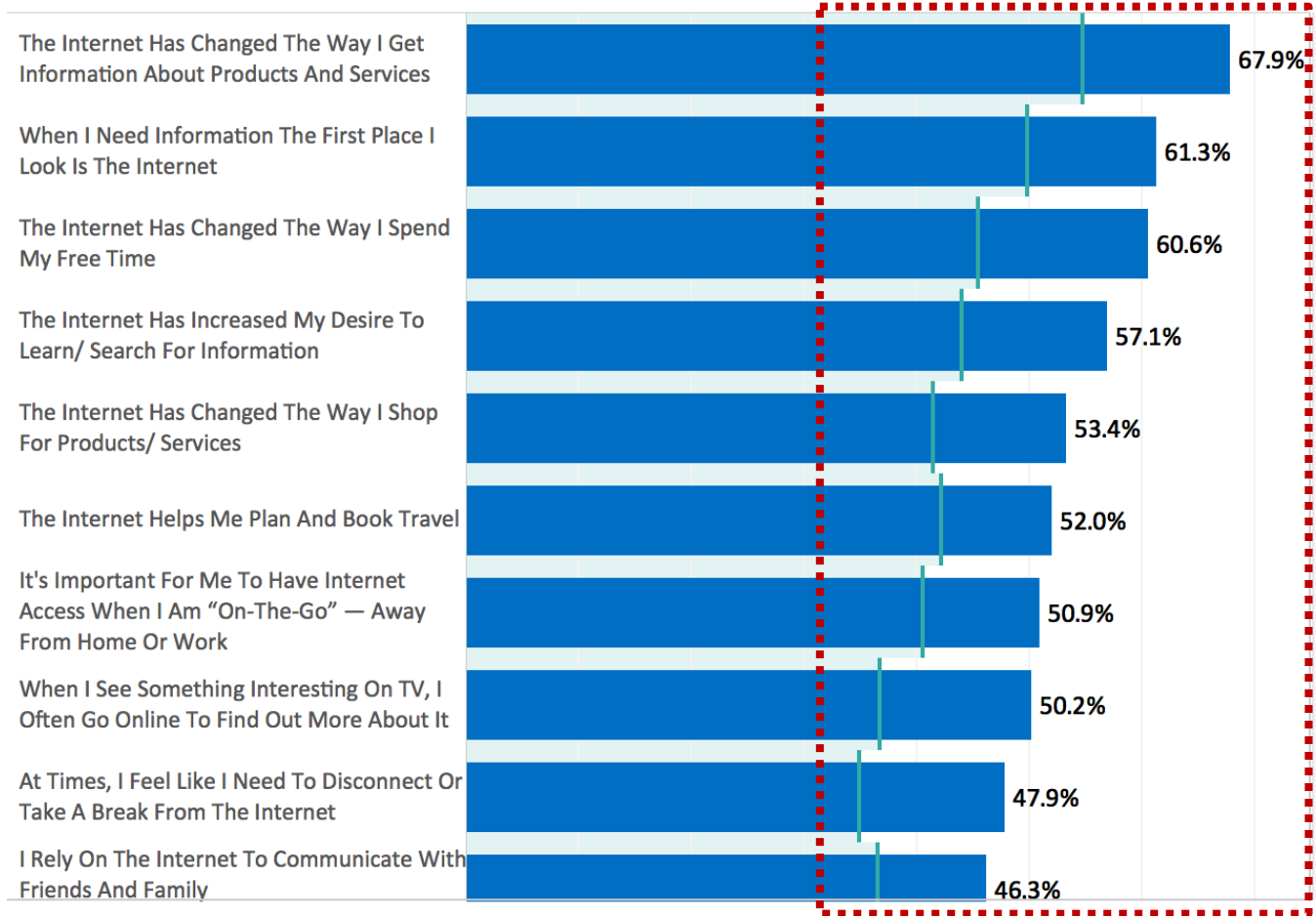
- New websites are most frequently learned about via search engines, from friends or colleagues or from another website. **Interestingly, 44% say they are more likely to visit a health website referenced by a doctor.** Additionally, 43.9% saw healthcare advertisements online which may have prompted them to explore more.
- **25% of the Fallbrook Behavioral Health Population are comfortable registering on a website that offers them specific information about their healthcare conditions** compared to 17.5% of the overall population. In the past 30 days, 39% visited a health- and medical-related website at home, while 24% used their phone to access medical/health sites.

# ENGAGEMENT & MEDIA

## Internet

### Internet Attitudes

The Behavioral Health Population are big users of the internet – from looking up information to buying products

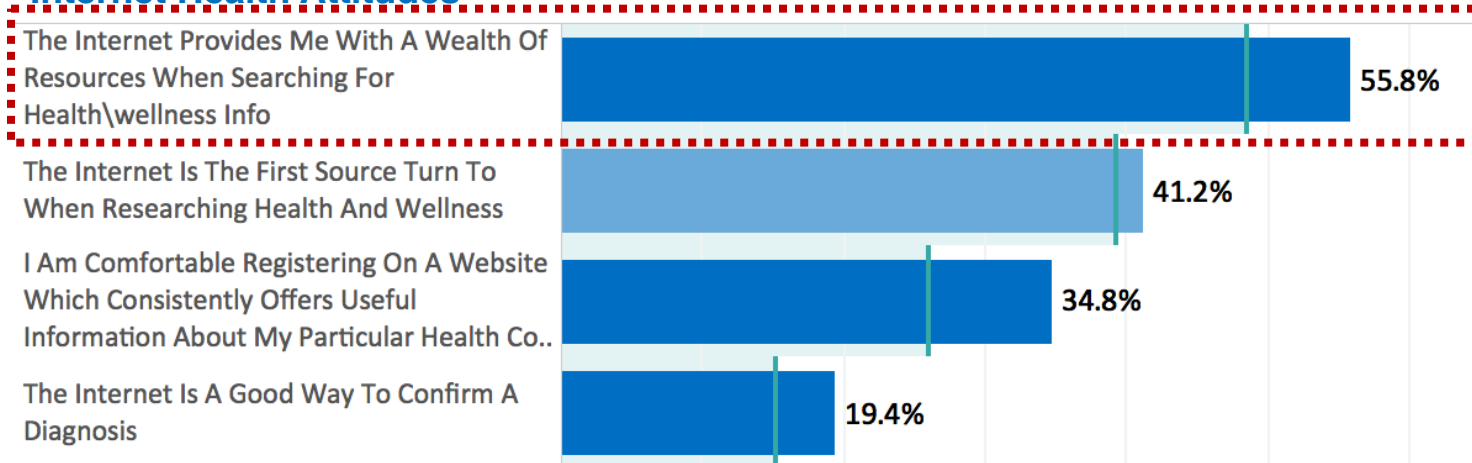


Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## Internet

### Internet Health Attitudes



It's then no surprise that when it comes to health – the internet is an important resource for them

They are very comfortable registering on their “go to” websites

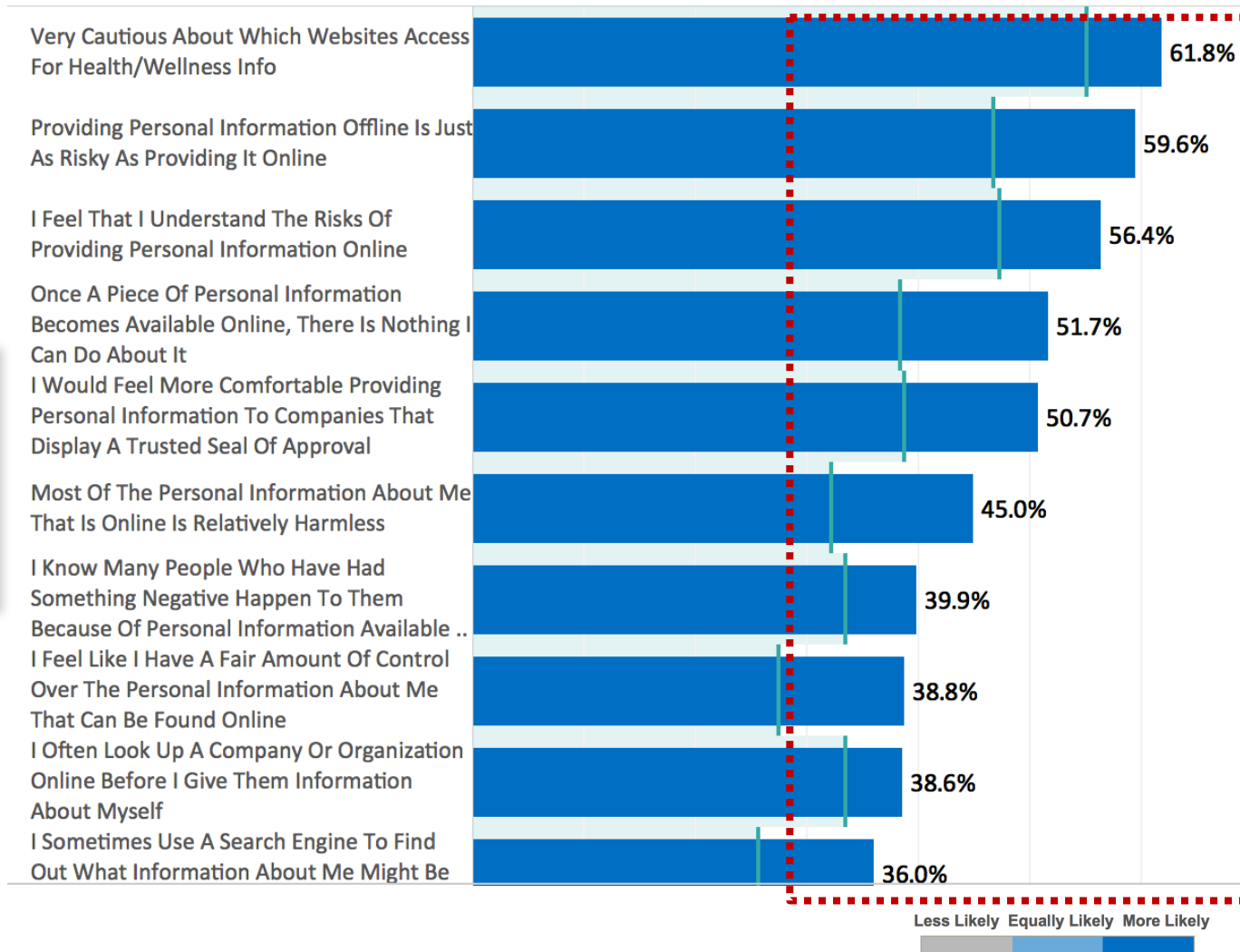
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# ENGAGEMENT & MEDIA

## Internet

### Internet Security Attitudes

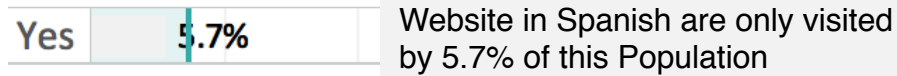
Again, this Population is serious about their privacy and cautious about providing information



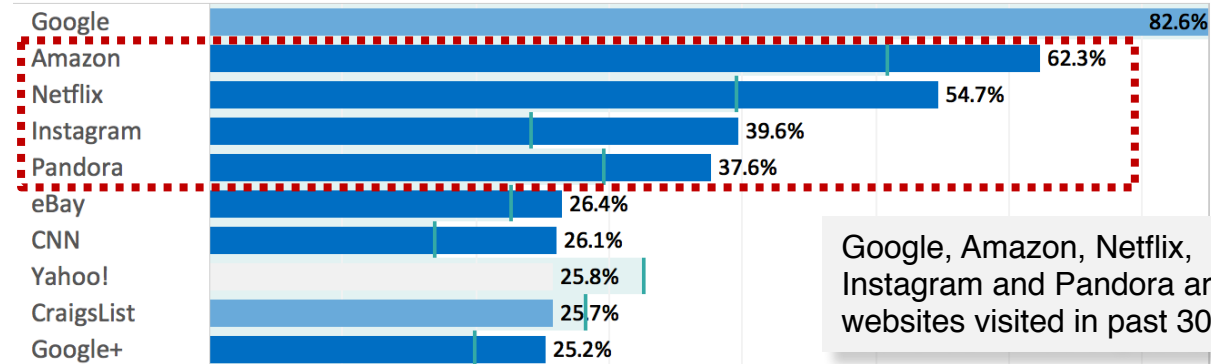
# ENGAGEMENT & MEDIA

## Internet

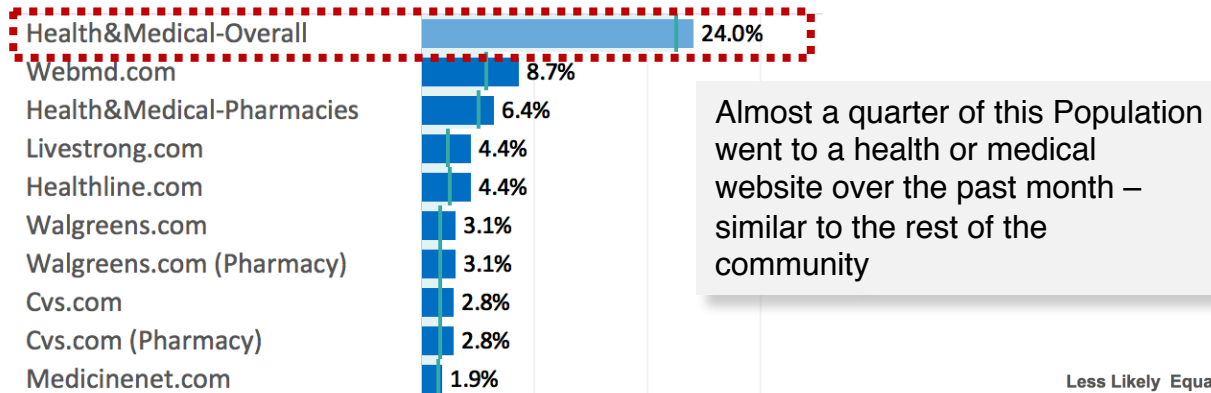
**Websites  
(Spanish)  
Used/Visited  
past 30 days**



**Websites  
Used/Visited  
past 30 days**



**Websites  
(Health),  
Used/Visited  
on Mobile  
(past 30 days)**

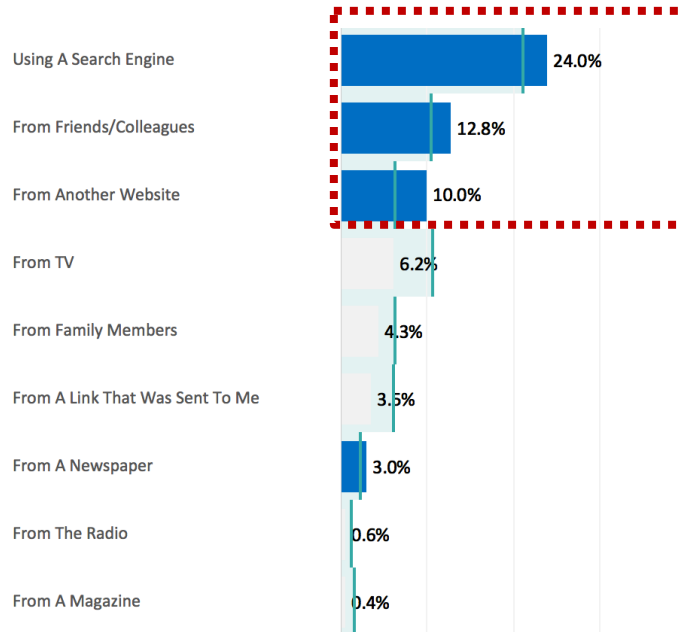


Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

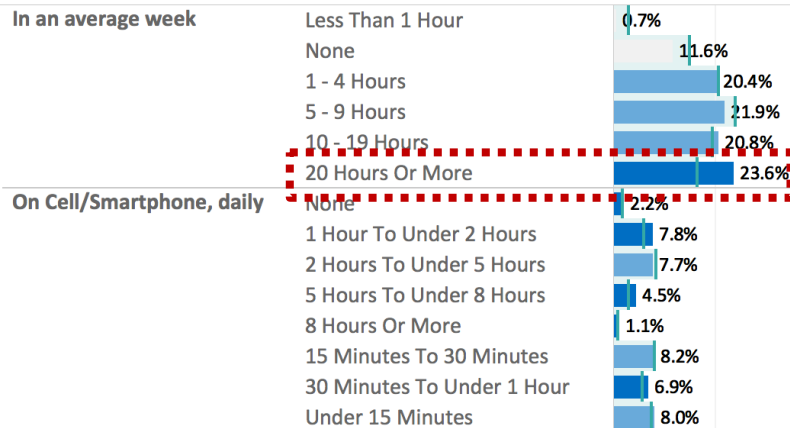
## Internet

### New Websites – How Learn About Most Often



The Behavioral Health Population is on the internet searching and 12.8% talk to their friends/colleagues about what they find

### Time Spent on Internet



The Behavioral Health Population is more likely to spend 20+ hours a week on the internet, but almost the entire population spends some time on the internet.

Less Likely Equally Likely More Likely

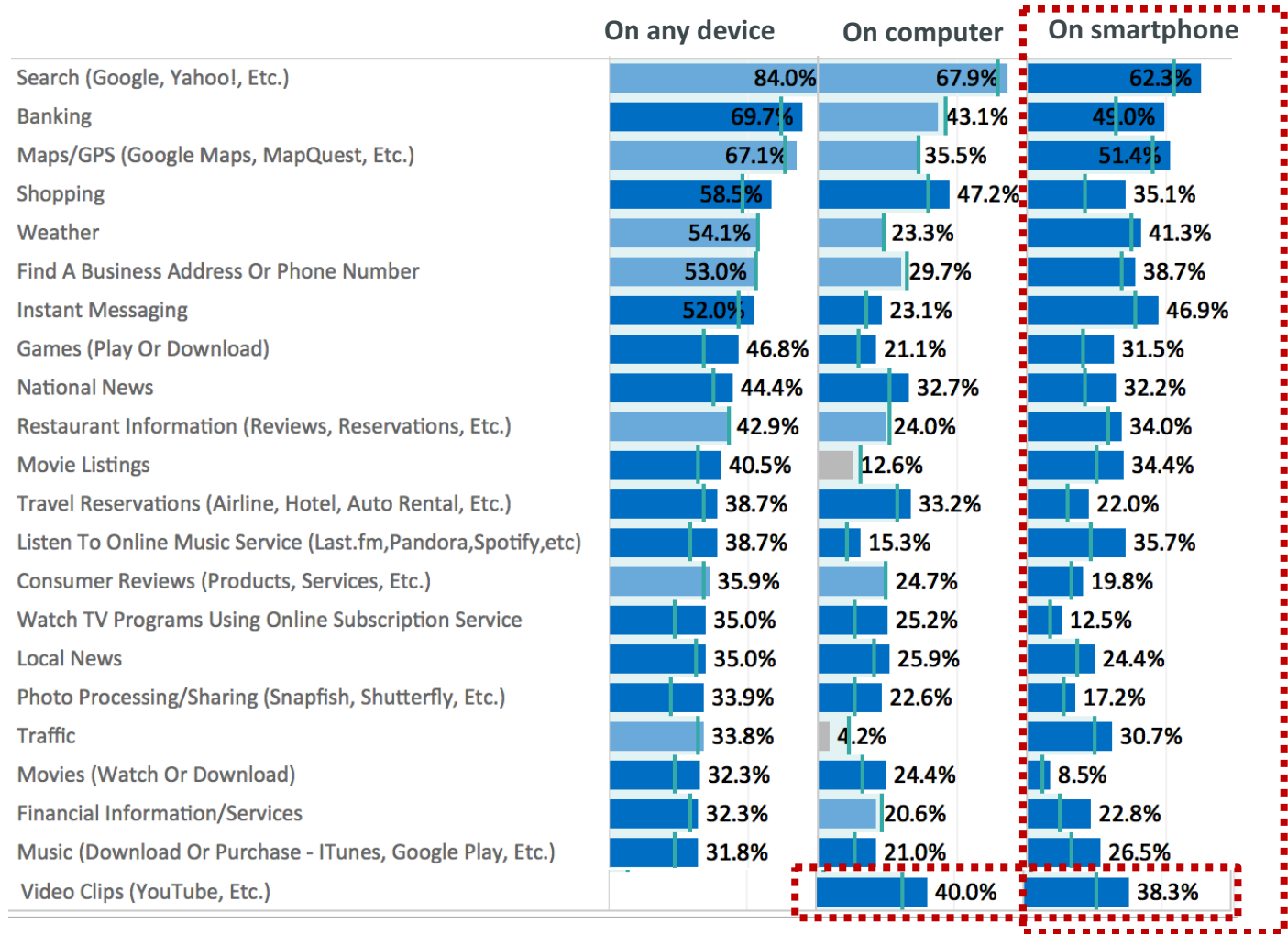


# ENGAGEMENT & MEDIA

## Internet

### Ways Used Internet/Apps Past 30 Days

The Behavioral Health Population over index on using their Smartphone for internet and apps and like so many – love watching video/ YouTube



Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## Email

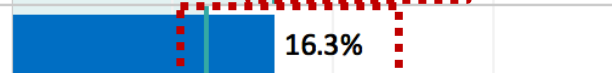
### Email Attitudes

I Like To Hear About New Products And Services Via E-Mail

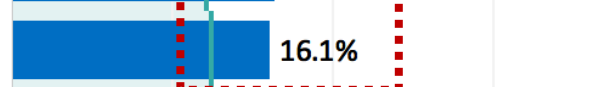


### Emailing, Time Spent Daily

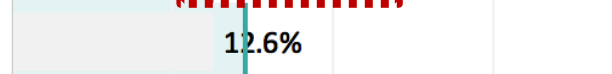
30 Minutes To Under 1 Hour



15 Minutes To 30 Minutes



Under 15 Minutes



1 Hour To Under 2 Hours



2 Hours To Under 5 Hours



5 Hours To Under 8 Hours



None



8 Hours Or More



A little more than 20% appreciate hearing about new products via email

More than 30% spend 15 minutes to an hour emailing daily

Less Likely Equally Likely More Likely

## BEHAVIORAL HEALTH POPULATION

# Mobile Behaviors

- **81% of the Fallbrook Behavioral Health Population owns a smartphone**, with Android being the preferred operating system. They are just as comfortable browsing on their laptops, as they are their cellphones. In fact, **43.8%** access the internet more through their smartphones than on a traditional laptop or desktop.
- They **rely on their phones to keep up with news, weather and to stream content**. Half of the Population says their cellphones are the connection to their social world (compared to **37.5%** of the overall population), while **67.5%** feel their cellphones are great for staying in touch with friends and family.
- **40% admit their friendships would not be as close as they are without cellphones**, and **21%** say their phones are an expression of who they are versus **12.8%** of the overall population.
- Texting is fairly popular with this group, with **49.3% sending between 10–29 texts per day**. **8.6%** even send between 50–74 texts per day! In contrast, the overall population sees **26.7%** sending between 1–4 text messages per day.

## BEHAVIORAL HEALTH POPULATION

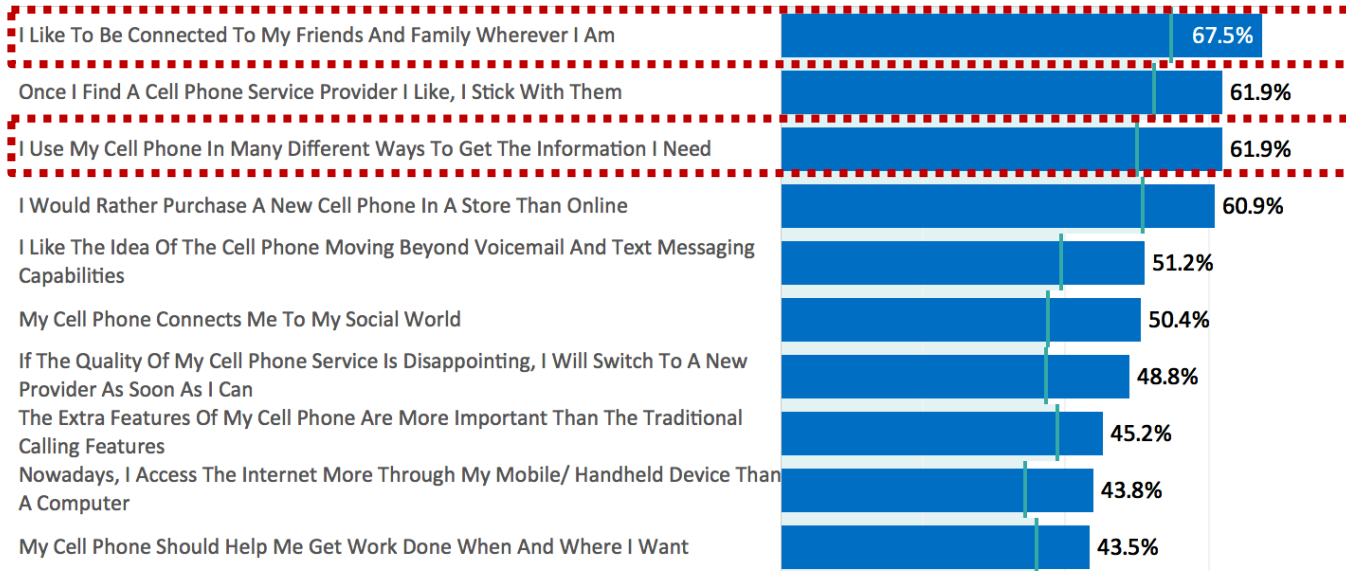
# Mobile Behaviors

- Top activities on cellphones include search, banking, GPS, shopping, watching video clips and instant messaging.
- 25.1% of the Fallbrook **Behavioral Health Population** believe there are mobile apps that would improve their current health, and 27.3% would be willing to use a mobile app offered by their insurance company. An additional 36.4% would be interested in an app recommended by their physician.
- For all of their cellphone interconnectivity, 36% admit cellphone plans are confusing and 37% say if they have access to a landline they'll use a corded phone instead.

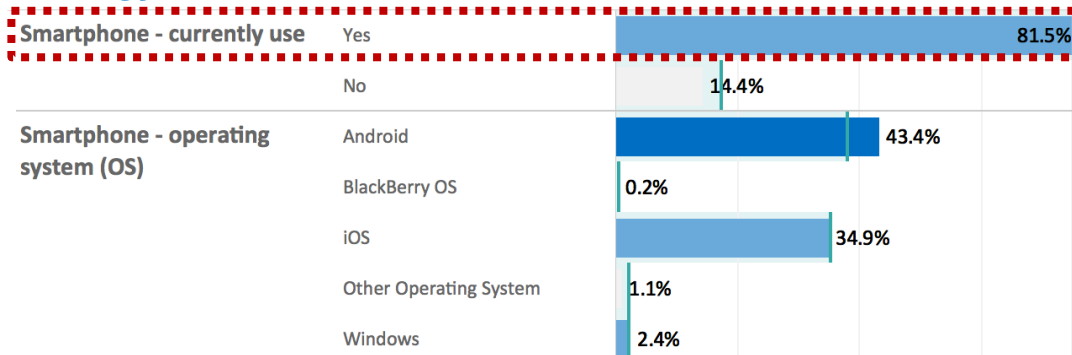
# ENGAGEMENT & MEDIA

## Mobile and Technology

### Mobile Attitudes



### Mobile Technology and Services



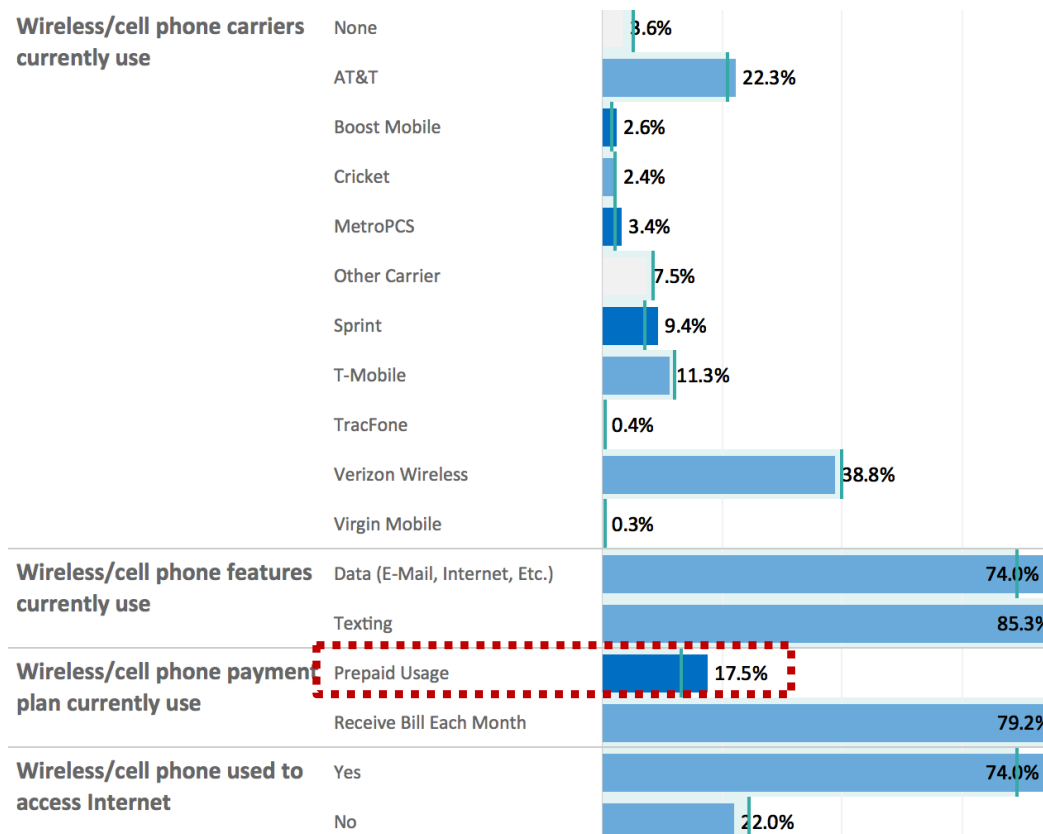
Cell Phones are absolutely vital to this population with 81.5% having a smartphone

Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## Mobile and Technology

### Mobile Technology and Services (continued)



Mobile phone carriers and features used are similar – although this Behavioral Health Population does use prepaid mobile usage slightly more than the community.

Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## Mobile and Technology

### Mobile Usage

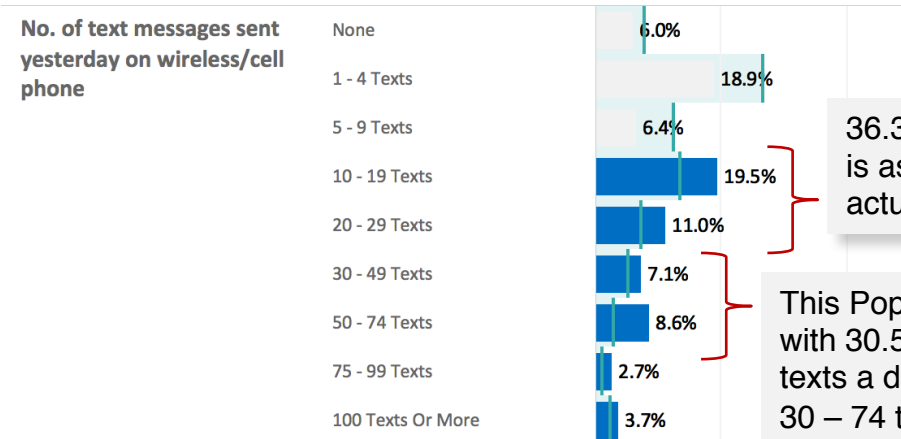


A quarter of the Population would consider giving their location on their mobile

### Text Attitudes



### Time Spent



36.3% feel that texting is as meaningful as an actual conversation

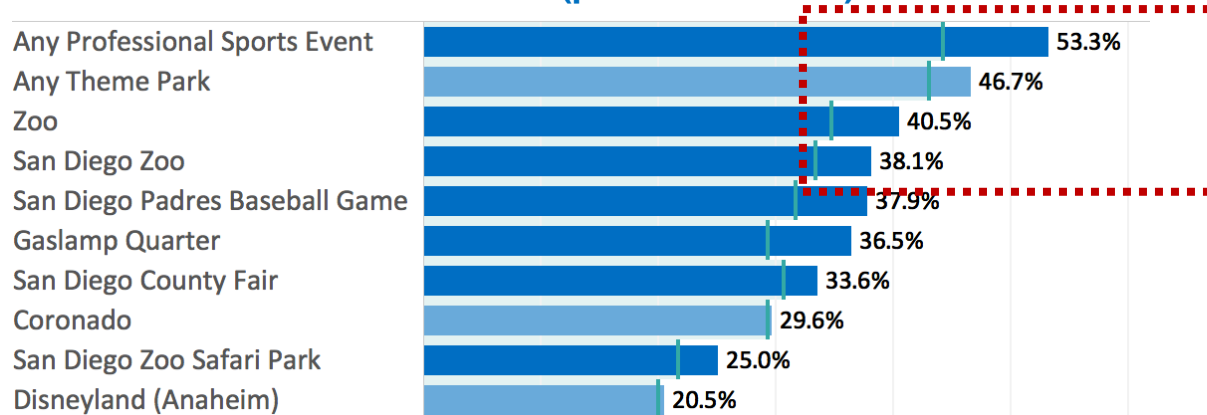
This Population relies on texting with 30.5% sending 10 - 29 texts a day and 15.7% sending 30 - 74 texts a day

Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

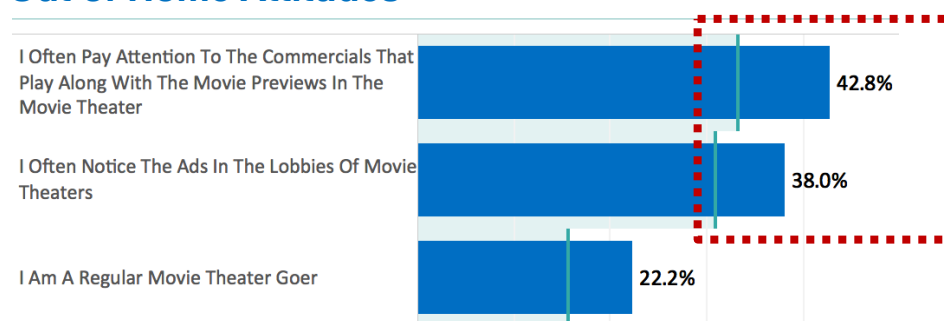
## Places

### Events Attended/Places Visited (past 12 months)



The Behavioral Health Population attended at least one sports event (53.3%) and zoo visit (40.5%) over the last year

### Out of Home Attitudes



This Population is more likely to pay attention to ads in movie theaters than the rest of the community

Less Likely Equally Likely More Likely



## BEHAVIORAL HEALTH POPULATION

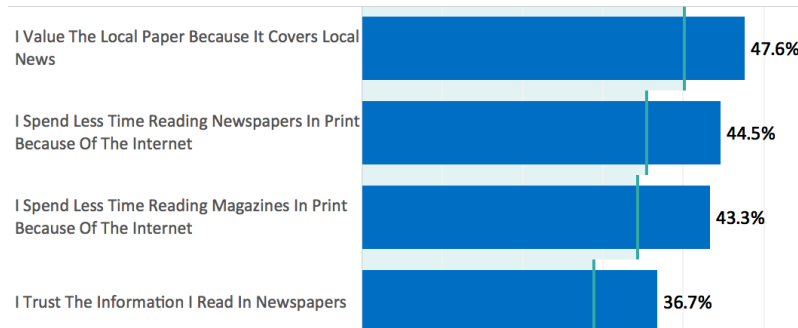
### Print & Radio

- Although more news is sourced through digital avenues, the impact and relevance of newspapers has not waned for the **Fallbrook Behavioral Health Population**. A quarter purchase print editions and **23% say they read a newspaper most days**. Around 37% trust the information they read in print and 46% value newspapers specifically for their ability to discuss local happenings.
- Magazines are an occasional treat and for a media-inspired 13%, they are temptations they simply can't resist. **Advertising is noticed by around 25% for both print and newspapers**.
- **45% of the Fallbrook Behavioral Health Population listen to the radio everyday** and 61% tune in while they're driving around town. Their top music preferences are adult contemporary and news/talk. 28% say radio is great for getting a quick news update. Similar to print media, radio listeners are increasingly turning to digital stations for their music fix. **14.5% have logged onto Spotify in the past 30 days (compared to 10% of the overall population) and 38% hummed along with Pandora**.

# ENGAGEMENT & MEDIA

## Print Media

### Print Attitudes



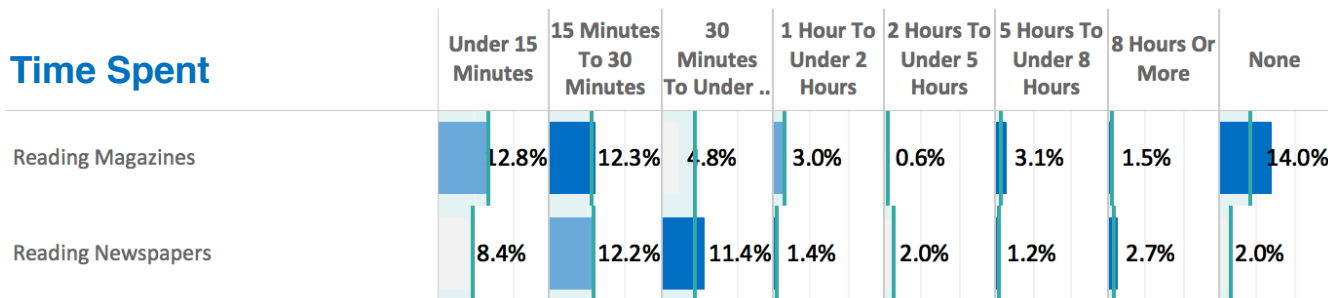
This Population say they value local newspapers and trust newspapers – but only a quarter look at a daily paper and spend under 30 minutes doing so

### Newspapers



Less time is spent reading newspapers and magazines in print probably because they can find information on the internet

### Time Spent

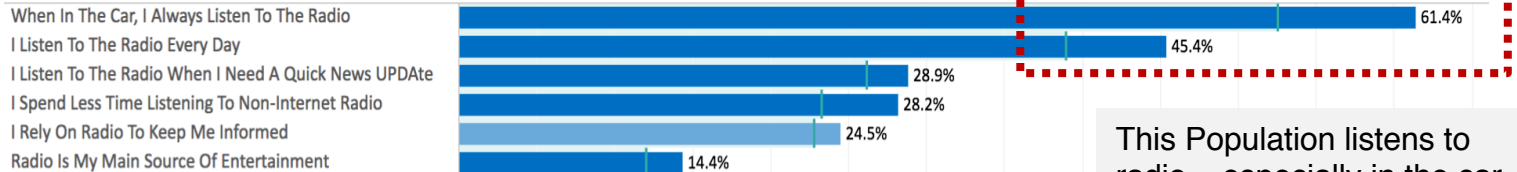


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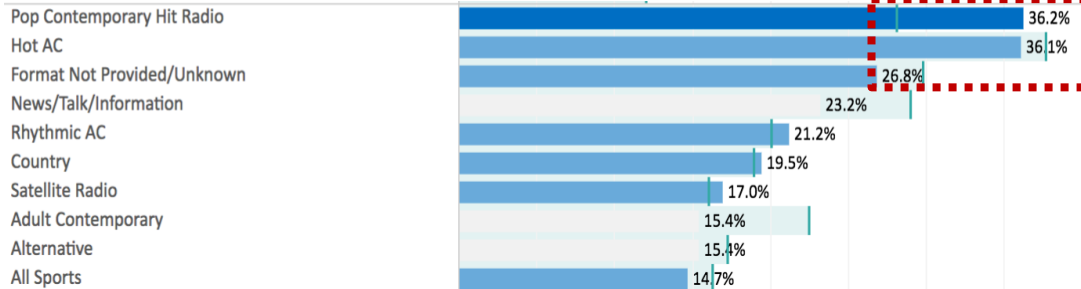
# ENGAGEMENT & MEDIA

## Radio

### Radio Attitudes

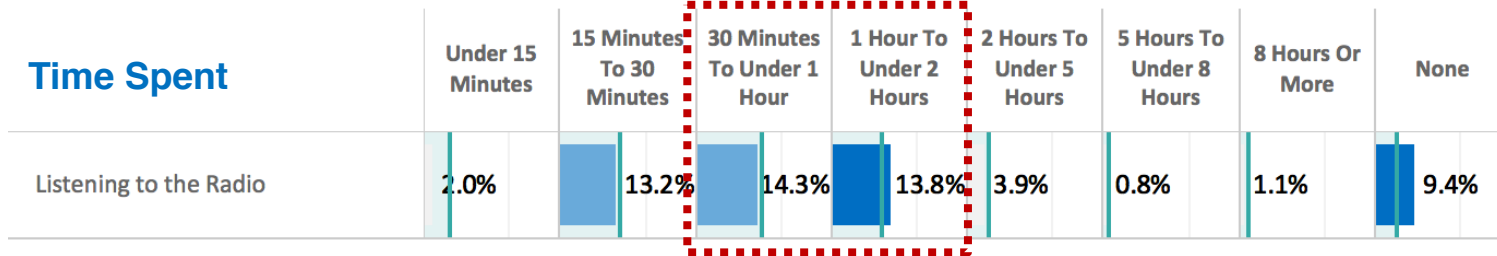


### Radio Format



This Population listens to radio – especially in the car with 36.2% tuning in to a Pop Contemporary station or Hot AC

### Time Spent



28.1% spend 30 minutes to 2 hours listening to the radio

Less Likely Equally Likely More Likely

## BEHAVIORAL HEALTH POPULATION

# Social Media

- **65% of the Fallbrook Behavioral Health Population uses social media**, with Facebook, Instagram, Pinterest and YouTube all being popular channels. 43% of the Population spends between 1–2 hours per day on these websites and 35% log in three or more times each day versus 23.4% of the overall population.
- While plenty of people are busy discussing their political beliefs on social media, this Population avoids expressing their own views. **Their top reasons for being on social are to keep up with family and friends** and simply because it's fun.
- **Mostly, they post humorous videos or photos of their everyday experiences.** Instagram allows them to highlight their artistic skills via photographs and Pinterest lets them plan the future of their dreams. They click on links posted by others and are comfortable posting, commenting and sharing content to their timelines and walls.

## BEHAVIORAL HEALTH POPULATION

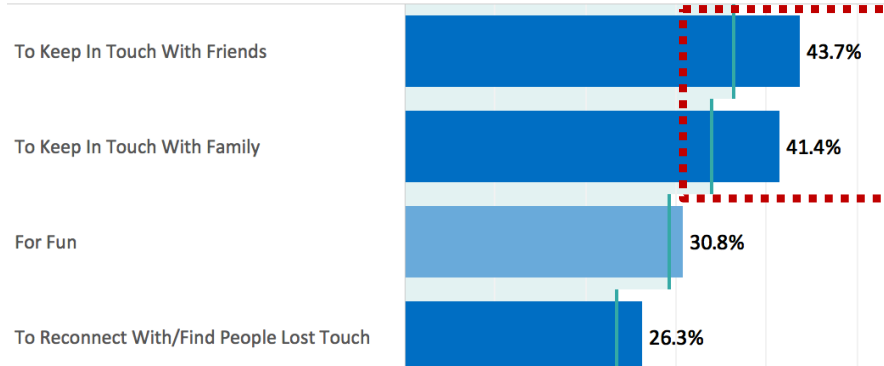
# Social Media

- **What they read on social media often comes up in face-to-face conversations;** it is an easy place to get the inside scoop on what is happening with family and friends.
- Blogs are also a good place for many within the Population to read up on their favorite TV shows or hobbies. 30% visit blogs regularly, but don't look for them to comment—less than 5% will post to a blog.
- **They notice display advertising on social media, but only 27% directly follow their favorite brands** on social media, mainly to receive coupon codes for future purchases.
- LinkedIn is not a channel they frequent and less than **10% say they use social media as a tool for professional development.**
- Interestingly, 8.5% trust the medical information other people share on social media.

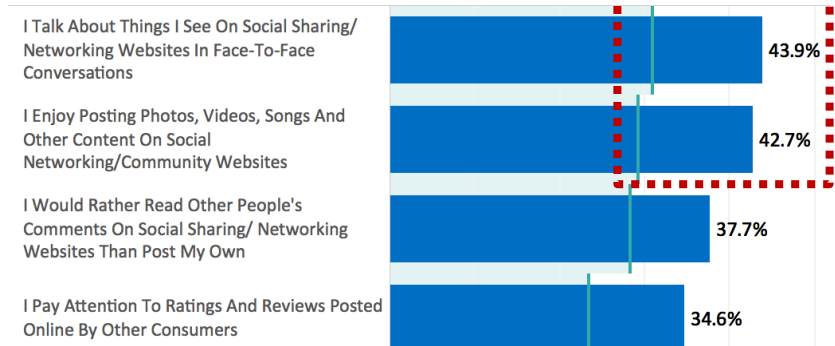
# ENGAGEMENT & MEDIA

## Social Media

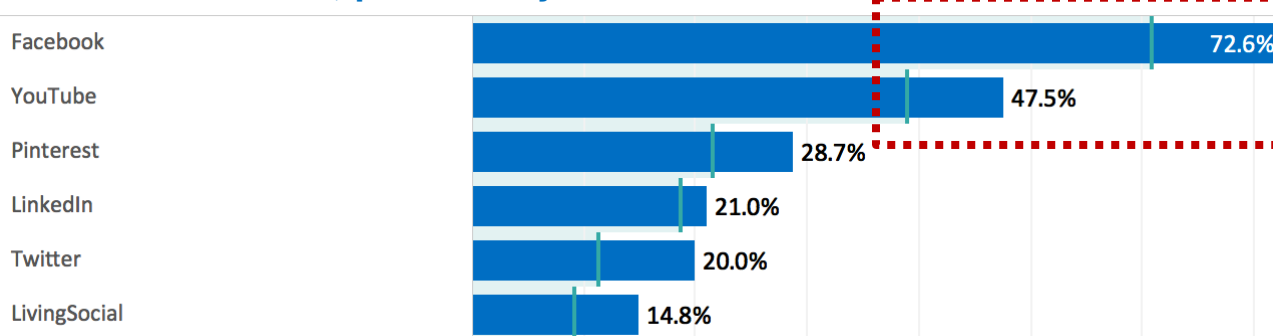
### Reasons for Using Social Networking Sites



### Social Media Attitudes



### Social Media Sites, past 30 days



Social Media is truly a way to be social with their friends and family – this is where they spend their time online

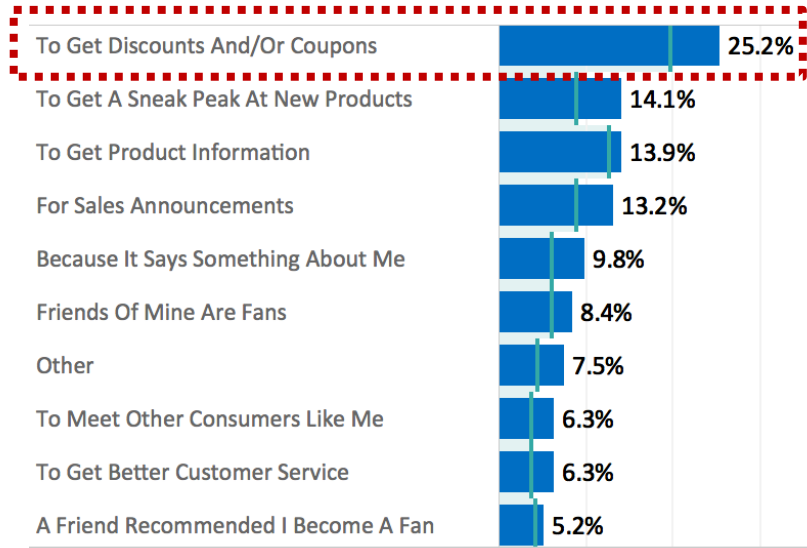
Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## Social Media

### Social Media Usage

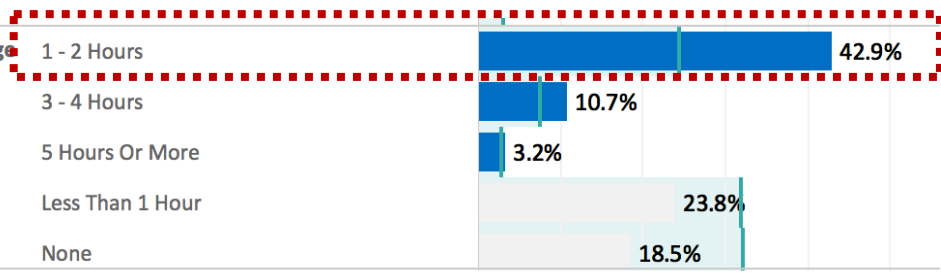
Why Support/  
Follow/ Friend  
Social Network  
Site



Even though social media is used to keep connected to friends and family – a little over a quarter would support or follow social media sites to get something back – coupons or discounts

### Time Spent, Social Networking Sites

In an average day



42.9% are spending 1-2 hours a day on social media

Less Likely Equally Likely More Likely

## BEHAVIORAL HEALTH POPULATION

### TV/Cable

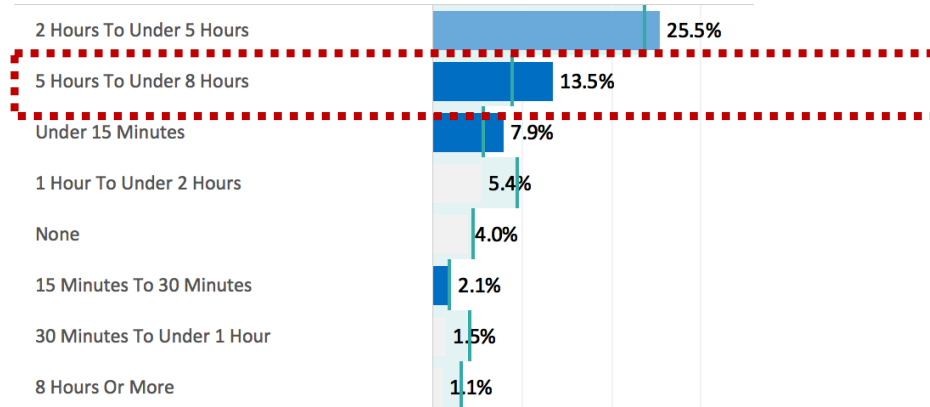
- The **television is the main source of entertainment for 52%** of the **Fallbrook Behavioral Health Population** versus 40.1% of the overall population. Whether they are streaming Netflix or watching *Scandal* on ABC, television is a nice escape into the intriguing lives of someone else.
- For 33% of the Population, if they couldn't have cable, they wouldn't even watch television!
- Most commercials are ignored, but **48% of the Fallbrook Behavioral Health Population says they recall seeing healthcare advertising on television.** Commercials served with a dose of humor are enjoyed best by this group.



# ENGAGEMENT & MEDIA

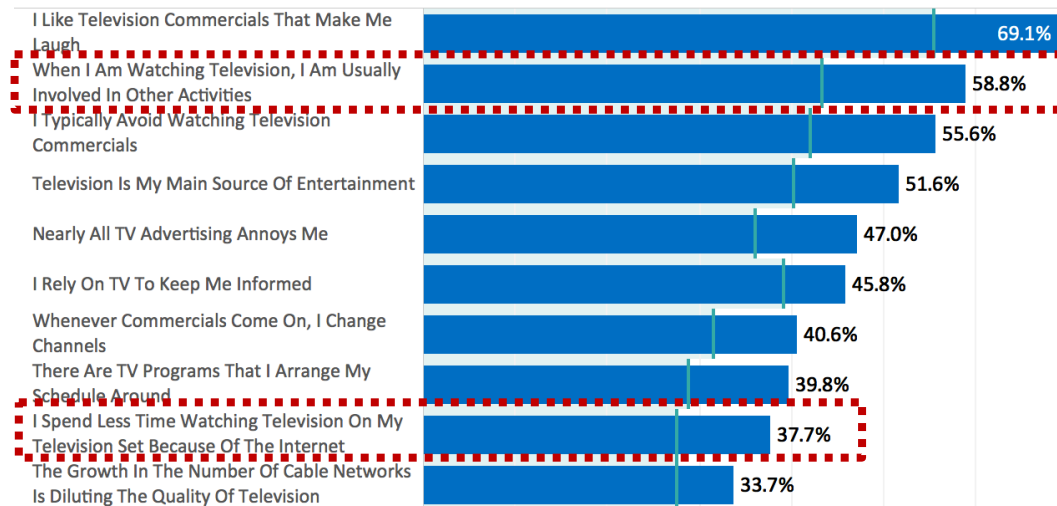
## TV/Cable

### Time Spent, Watching TV



25.5% watch 2 – 5 hours a day and 13.5% of this Population watch 5 – 8 hours a day

### TV/Cable Attitudes



58.8% are not totally focused on what they are watching since they do other things while the TV is on

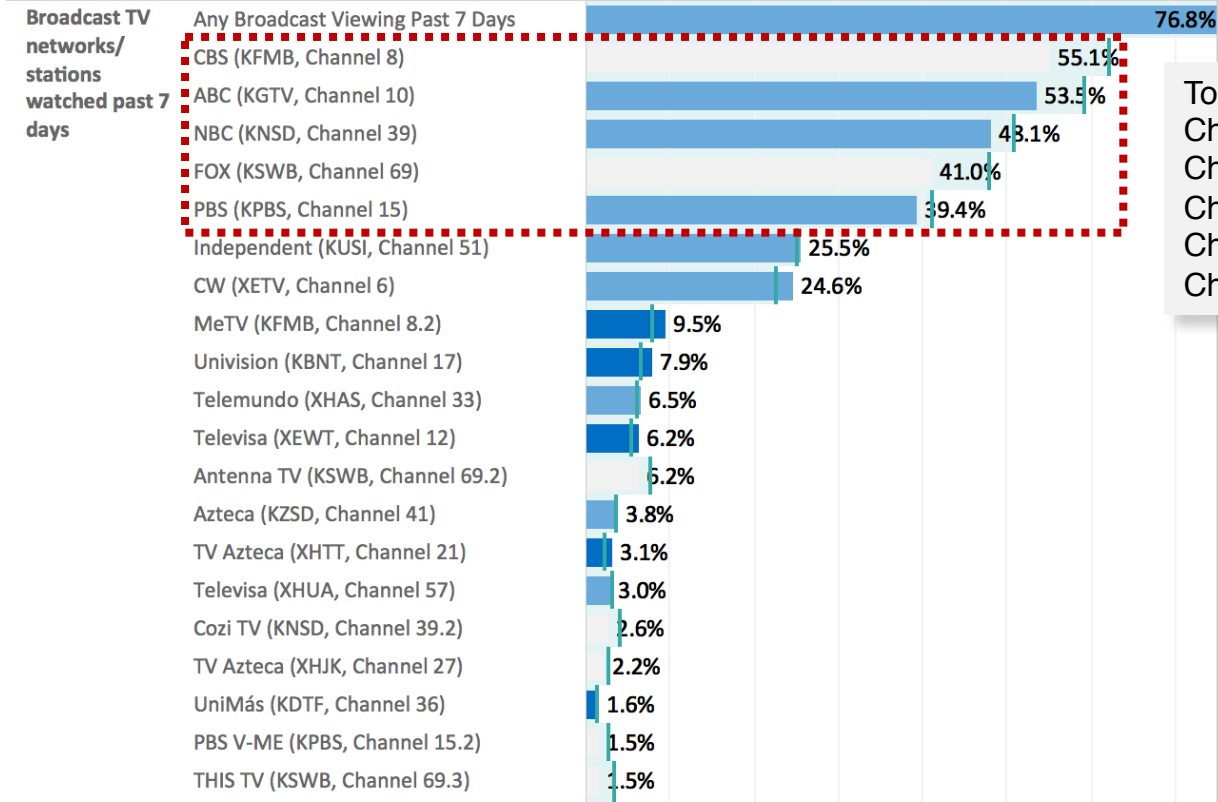
Over a third watch less TV due to the Internet

Less Likely Equally Likely More Likely

# ENGAGEMENT & MEDIA

## TV/Cable

### TV/Cable Stations



Top TV Stations –  
 Channel 8 (CBS)  
 Channel 10 (ABC)  
 Channel 39 (NBC)  
 Channel 69 (FOX)  
 Channel 15 (PBS)

Less Likely Equally Likely More Likely

## BEHAVIORAL HEALTH POPULATION

# Implications aka springboard ideas

### Online & Technology

- If this Population has a question about a health condition, they are likely to Google it to understand more. While Google can be a great resource, there is also a risk of the Population self-diagnosing through the lens of “Dr. Google.” **Use display advertising to steer them to the right resources.**
- If local behavioral health programs are available, make sure the information is readily available online. **Include addresses, times, sign up procedures and summaries of programming.** This group likes to explore on their own, so all information should be at their fingertips to encourage them to take part in programming. Being able to sign up online for a class or therapy sessions would be great for this introverted population.

## BEHAVIORAL HEALTH POPULATION

# Implications

### Online & Technology

- A community health and wellness website won't beat Google's algorithm for general searches such as "how to deal with anxiety" or "symptoms of PTSD," but you can **find unique keyword combinations to create an SEM play to direct people to a local site.**
- **Additionally, give physicians a list of websites (or a single website) that you want patients to use to find services.**
- Email is a source of high importance for receiving information, but most ask their names be kept off of generic email lists. **Ensure your email newsletters contain interesting content, key dates, appointment confirmations and more to keep this Population captivated by your messaging.**

## BEHAVIORAL HEALTH POPULATION

# Implications

### Online & Technology

- **Consider creating a “mind-body” library online** (or directing them to another site with such info) so this group can self-soothe on their own time without having to leave the comfort of their homes. Examples of mind-body content include guided meditation and breathing exercises that can be accessed digitally. **Even a customized Spotify playlist with soothing music may be of interest to this Population.**
- Inviting people who currently suffer from behavioral issues to discuss what has worked for them may also be an avenue to explore. **Short videos or blog posts with live people talking about their personal experiences can encourage others to take action.**

## BEHAVIORAL HEALTH POPULATION

# Implications

### Mobile

- Cellphones are portable computers that live in the pockets and purses of the Fallbrook Behavioral Health Population, so this group will access your site from their smartphones.
- Text message appointment reminders would be of use for the Fallbrook **Behavioral Health Population**. **You may consider introducing a pilot program that sends out daily or weekly stress relief tips via text** for this cellphone-savvy group. They could receive tips on their cellphones as a quick mental health check.
- 36% say they would be willing to download a healthcare oriented application if their physician recommended it. Rather than invest in building a separate application for healthcare, **suggest apps vetted by trusted organizations** such as the Anxiety and Depression Association of America.  
(<https://www.adaa.org/finding-help/mobile-apps>)

## BEHAVIORAL HEALTH POPULATION

# Implications

### Social Media

- Social media isn't a current health resource for most of the population, but that doesn't mean it couldn't become one. This is a group of avid readers who spend a great deal of time on the internet and on social media. **Consider using sponsored timeline posts to direct them to articles on mental health or other identified resources.**
- Facebook is the top channel for social networking. Sponsored timeline posts can entice them to click on articles, videos or other stories. If an individual shares a health perspective (think "My Life with Anxiety" or similar), **a promoted story on Facebook can be a good place to reach this group.**

## BEHAVIORAL HEALTH POPULATION

# Implications

### Social Media

- Pinterest is also a popular social channel. **For Pinterest, create a board featuring calming activities, meditations, comforting yoga poses and tips** for conquering anxiety, PTSD and depression.
- Instagram is the number-two-rated social platform for this Population, but advertising on Instagram has proven difficult for most within the industry. **A better ROI would be on Facebook or Pinterest.**
- Another opportunity for **connecting with your Population on social media can be through blogging.** Although this Population probably won't comment, that doesn't mean they won't read and share what you post. Consider interviewing doctors to gain their tips for good mental health practices or creating an article labeled "10 Steps to Decrease Anxiety Now."



## BEHAVIORAL HEALTH POPULATION

# Implications

### Television

- Commercials may not be the most cost-effective method for reaching the Population, as many change the channel when they come on the screen. However, 48% of the Population research what they see on TV online. **Discussing mental health initiatives on local media stations can prompt the population to conduct further research digitally.**
- **Hosting a regular segment, such as “Wellness Wednesday,” during the local news hour on television can be an additional avenue to reach this Population on television. Have a locally known physician deliver tips on maintaining physical and mental health. Draw the Population’s attention to specific websites or numbers you want them to call.**

## BEHAVIORAL HEALTH POPULATION

# Implications

### Print & Radio

- Radio advertisements can be an effective way to reach this group during drive times since most of the Population listens during their daily commutes. **Select news/talk radio stations and adult contemporary for the most amplification.**
- **Announcing wellness fairs, resources, social services and even art classes for mental health** can all be part of the campaign.
- Since the radio stations in Fallbrook are far reaching, advertisements on radio channels can be a good opportunity to **partner with other nonprofits with a similar goal to decrease the costs and reach other groups.**