

CRITICAL INSIGHTS
Strategic Market Research

Summary Report of Communications Check

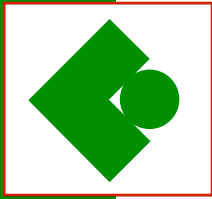
Prepared for:
CD&M Communications
and
Healthy Maine Partnerships

Focus Groups • Surveys • Public Opinion Polling

120 Exchange Street, Portland, Maine 04101

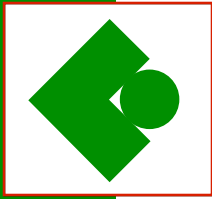
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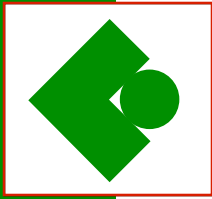
Introduction (cont.)

- Healthy Maine Partnerships also wishes to document current levels of awareness regarding:
 - Awareness of sound nutritional guidelines
 - Consumption patterns at fast food establishments
 - Exposure to and recall of messages about sound nutritional principles
 - Exposure to and recall of messages addressing guidelines for physical activity



Objectives

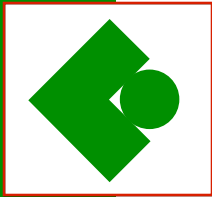
- Evaluate level of awareness and perceptions of the Healthy Maine Partnerships;
- Determine awareness of health-related advertising on both unaided and aided basis;
- Ascertain where people are seeing health-related advertising; and
- Evaluate key opinions, attitudes and behaviors concerning smoking and tobacco usage, physical activity and nutrition.



Respondent Qualifications

Sample selection was accomplished through randomly selecting respondents from lists provided by computer-generated random digit dialing method. In order to qualify for inclusion in the survey, a respondent must:

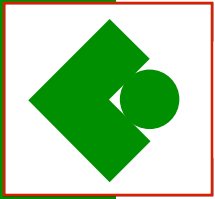
1. Be over 18 years old;
2. Not be employed or have any affiliation with a market research firm or advertising agency; and
3. Not have anyone in the household, or any friend or close friend be currently employed or have any affiliation with a market research firm or advertising agency.



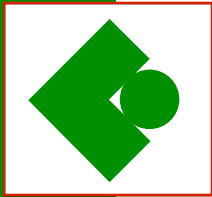
Methodology

Wave / Year	Number of respondents	Dates Research Conducted	Error Margin		Refusal Rate	Length of Interview
			90%	95%		
I: 1999	601	March 23 – April 6, 1999	+/- 3.4	+/- 4.0	17.7%	12 minutes
II: 2000	605	June 30 – July 13, 2000	+/- 3.4	+/- 4.0	10.6%	13 minutes
III: 2001	605	February 28 – March 8, 2001	+/- 3.4	+/- 4.0	16.1%	16 minutes
IV: 2002	602	May 17 – June 11, 2002	+/- 3.4	+/- 4.0	17.1%	28 minutes

- The questionnaire utilized was developed in collaboration with CD&M Communications and Healthy Maine Partnerships.
- Interviews were conducted from the Critical Insights Information Center utilizing our 30-station state-of-the art computer assisted telephone interviewing (CATI) system.
- Fifteen percent of all interviews were verified with callbacks within 24 hours of the actual interview. Refusal rates were 17% overall, indicating that the sample was not tainted by non-response error.



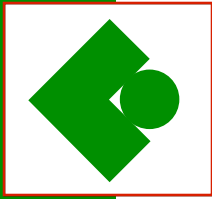
Analysis



Analytical Framework

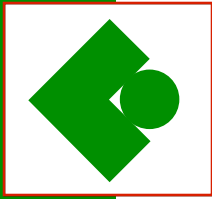
To explore any differences of opinion among the various subgroups of the overall sample, the data was compared and contrasted by the following segments:

		2002	
Category	Subgroup	n	%
Region	Southern	194	32
	Central/Western	141	23
	Coastal	137	23
	Northern	130	22
Smoking Status	Yes (current smoker)	106	18
	Never	240	40
	Quit (former smoker)	256	43



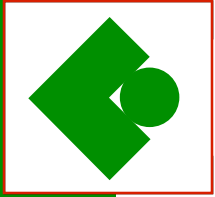
Analytical Framework (cont.)

Category	Subgroup	2002	
		n	%
Age	Less than 35 years old	117	19
	35 to 64 years old	367	61
	65 years old or older	118	20
Income	Less than \$25K	162	27
	\$25K to \$49K	202	34
	\$50K or higher	183	30
Education	Less than high school	43	7
	High school to some college	353	59
	College or higher (postgraduate)	206	34

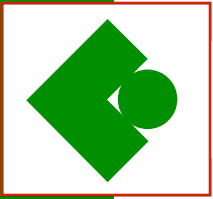


Analytical Framework (cont.)

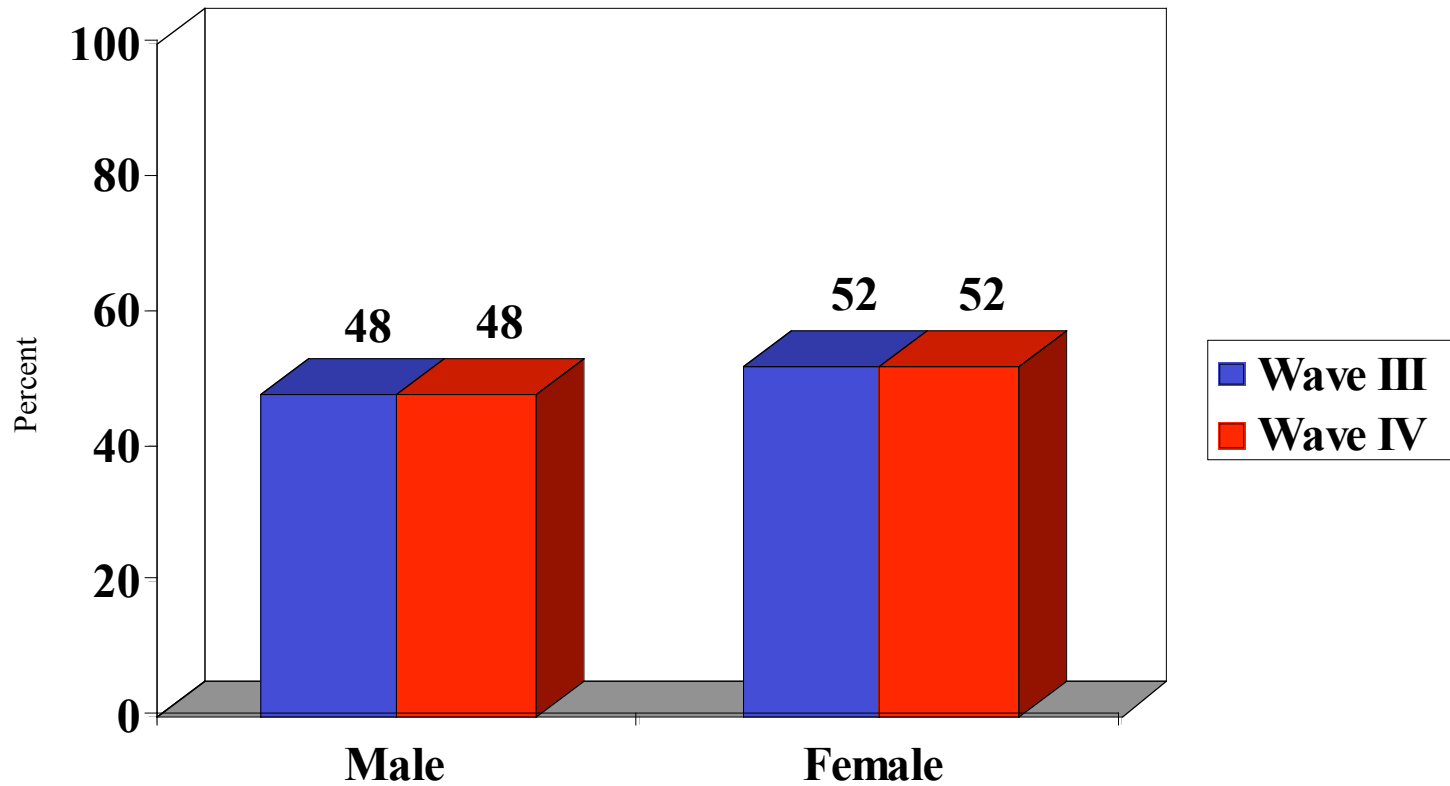
Category	Subgroup	2002	
		n	%
Gender	Male	288	48
	Female	314	52
Children in Household	One or more	218	36
	None	382	63

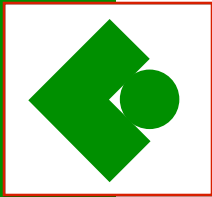


Respondent Profile



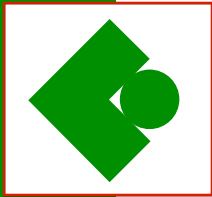
Gender





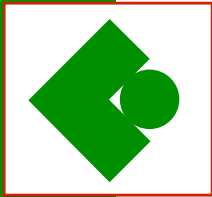
Age

In which of the following age categories do you belong?	Wave III	Wave IV
18 to 24 years old	5%	5%
25 to 34 years old	15	14
35 to 44 years old	23	21
45 to 54 years old	25	23
55 to 64 years old	17	18
65 to 69 years old	6	8
70 years old and over	10	12



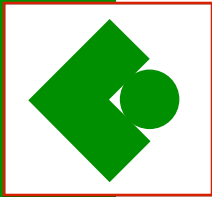
Educational Background

What is the last grade of school that you completed?	Wave III	Wave IV
Grammar school (up to 8 th grade)	2%	1%
Attended high school	5	6
Completed high school	33	33
Attended college	22	25
Completed college	23	21
Postgraduate work or degree	12	13
Other	3	1



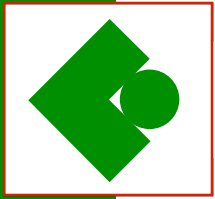
Household Income

Was your total combined household income before taxes last year...	Wave III	Wave IV
Under \$15,000	13%	11%
\$15,000 to \$24,999	14	16
\$25,000 to \$34,999	14	15
\$35,000 to \$49,999	18	19
\$50,000 to \$69,999	15	16
\$70,000 or over	15	15
Don't Know/Refused	12	10

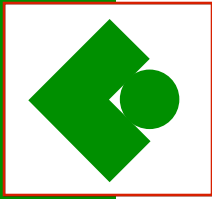


Children in Household

How many children do you have living at home?	Wave III	Wave IV
One	19%	15%
Two	15	13
Three	5	7
Four	2	2
Five or more	1	1
None	59	64



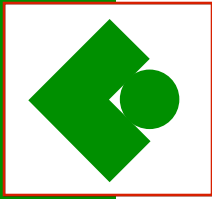
Mindset



Concern with Various Issues

First, I'm going to read you a short list of various problems. I would like you to tell me how much you are concerned about each one. *	Wave III	Wave IV
Crime and violence in schools	6.0	5.6
Trafficking and use of illegal drugs	5.9	5.9
National healthcare reform	5.7	5.8
The State of Maine's economy and jobs in Maine	5.7	6.0
The quality of Maine's environment	5.5	5.7
Cigarettes and tobacco use in Maine	5.2	5.4

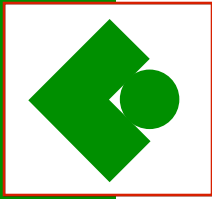
* Based on a scale where a 1 means "of no concern at all" and a 7 means "of great concern"



Concern with Various Issues (cont.)

First, I'm going to read you a short list of various problems. I would like you to tell me how much you are concerned about each one. *	Wave IV
The taxpayer burden resulting from poor health choices by Maine residents	5.5
Childhood obesity in Maine	5.2
Cardiac (heart)-related deaths in Maine	5.1
Adult obesity in Maine	5.0
Impact of development and sprawl in Maine	4.7
Asthma in Maine	4.6

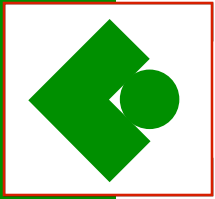
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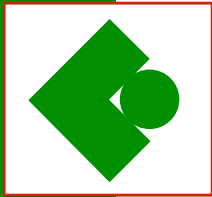
Attitudes/Beliefs (cont.)

You may agree or disagree “somewhat” or “strongly” or you may choose to neither agree nor disagree with the statement. *	Wave IV
Regular physical activity (30 or more minutes most days of the week) is important in order to maintain my health	4.6
You can improve your health by accumulating physical activity periods, such as doing ten minutes of physical activity at three different times in a day	4.2
Most people in Maine are aware of what they need to eat to insure proper nutrition	3.0

* Based on a scale where a 1 means “strongly disagree” and a 5 means “strongly agree”



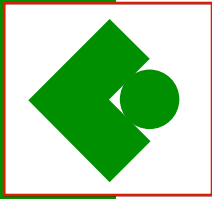
Awareness



Unaided Awareness

I'd like you to think about any advertising for health and wellness issues that you may have seen or heard. What health and wellness issues have you seen or heard messages about? What others? *	Wave III	Wave IV
→ Cigarettes/Tobacco use	42%	44%
Health care system issues/reform/medical insurance	21	16
Drug use/drug issues	16	24
Drinking and driving (alcohol issues)	8	8
Cancer/cancer testing	7	18
Seatbelt use	6	1
Environmental problems (air, water, clear cutting)	6	5
→ Teenage smoking	5	7
→ Obesity/unhealthy weight gain	—	17
→ Heart disease	1	15
None	15	10
Don't Know/Refused	14	9

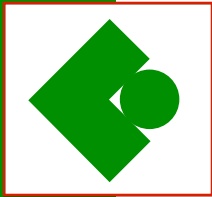
* Multiple responses accepted



Aided Awareness

Have you seen or heard any messages on TV or radio, or in the newspapers and magazines about...*	Wave III (% yes)	Wave IV (% yes)
Drug use/drug issues	89%	94%
Cigarettes/tobacco use	88	91
Teenage smoking	87	89
Secondhand tobacco smoke	84	87
Power line safety	70	67
Seatbelt use	62	75
Cancer/cancer testing	60	75
AIDS/HIV prevention/condom use	60	74

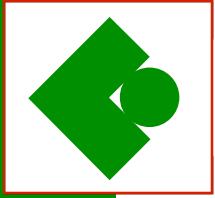
* Based on respondents who did not recall message unaided



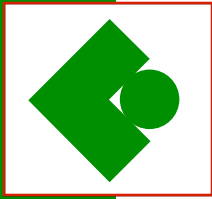
Aided Awareness (cont.)

Have you seen or heard any messages on TV or radio, or in the newspapers and magazines about...*	Wave IV (% yes)
Drinking and driving	95%
Healthcare/health/medical insurance	84
Environmental problems (air, water, clear cutting)	81
Maintaining a healthy lifestyle	77
Cell phone use	74
Obesity or unhealthy weight gain	69
Guidelines for good nutrition	67
Abstinence from sex	56
Guidelines for physical activity	62
“Safe” cigarettes	19

* Based on respondents who did not recall message unaided



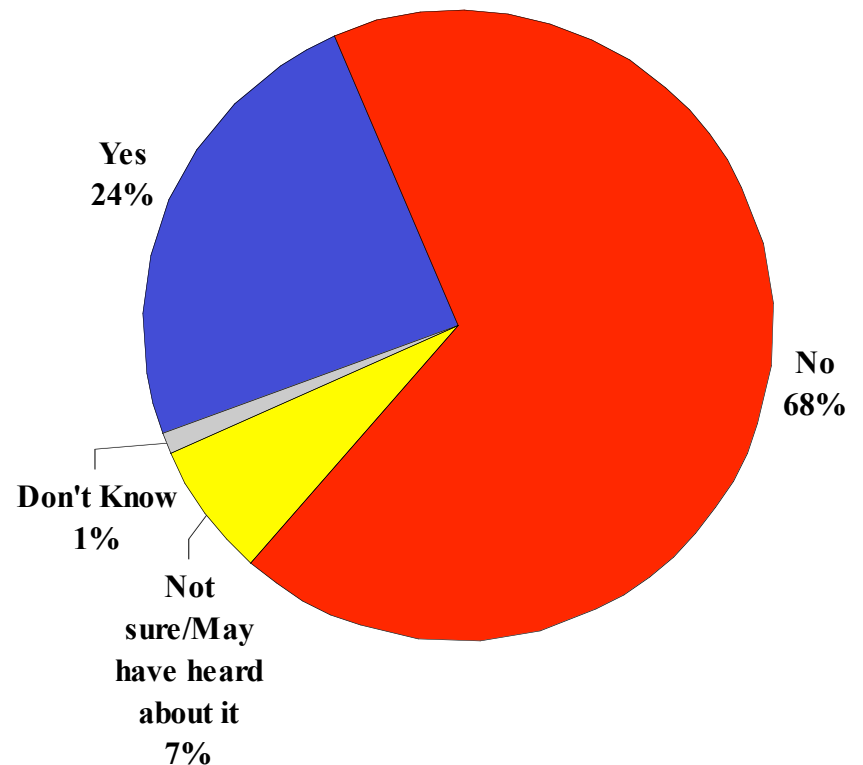
Healthy Maine Partnerships

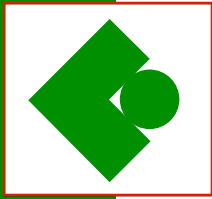


Awareness of Healthy Maine Partnerships

- Respondents 65 years of age and older were significantly less likely to have heard of Healthy Maine Partnerships.

Have you ever heard of the Healthy Maine Partnerships?

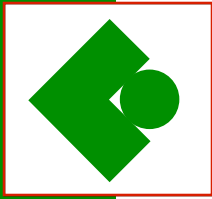




Knowledge of Healthy Maine Partnerships

What is the Healthy Maine Partnerships? *	Wave IV n=147
A state government agency	5%
Anti-smoking group	4
A statewide effort by local community groups	4
A coalition of health specialists and law makers	3
A coalition of private interests	3
Don't Know	67

* Based on respondents who claimed to be aware of the Healthy Maine Partnership (multiple responses accepted)



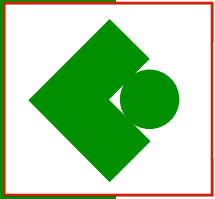
Message Recall: Healthy Maine Partnerships

- Only 18% of the respondents claimed to have seen messages referring to Healthy Maine Partnerships

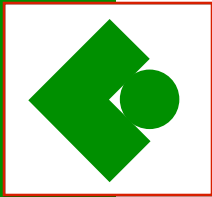
Have you ever seen any messages referring to Healthy Maine Partnerships? *	Wave IV n=107
Name/slogan	21%
Don't smoke/quit	15
Nutritional/dietary information	8
Promoting a healthy lifestyle	7
Promoting exercise	6
Nothing/Don't Know	47



* Based on respondents who indicated seeing messages referring to the Healthy Maine Partnerships (multiple responses accepted)



Attitudes and Habits Regarding Nutrition



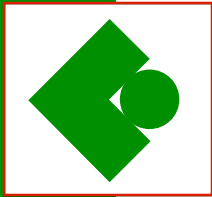
Steps to Improve Health

- In the past six months, 85% reported taking steps to improve their health

What have you done to improve your overall health? *	Wave IV n=511
Started a physical activity program/exercise	83%
Made changes to my diet/eating better	68
Visited doctor	9
Stopped smoking	5
Increased water intake	4
Tried to manage stress better	4
Started taking vitamins	4
Gotten more sleep	4

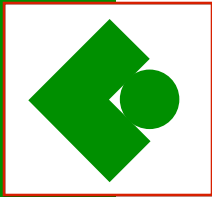


* Based on respondents who have taken steps to improve their health in the past six months (multiple responses accepted)



Health Concern: Self and Immediate Family

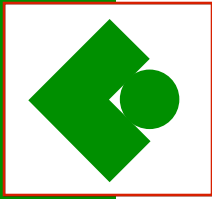
Of how much concern is.....	The current state of your own health	The health of an immediate family member
1 → OF NO CONCERN AT ALL	5%	5%
2	7	4
3	10	4
4	6	5
5	17	11
6	12	8
7 → OF GREAT CONCERN	43	63
Don't Know/Refused	—	1
MEAN	5.3	5.9



Frequency of Healthy Behaviors

Please tell me how frequently you do each of the following activities. Please use a five-point scale for your rating where a 1 means that you “never” perform this and a 5 means that you “always” perform this activity. How frequently do you...	Never	2	3	4	Always	Mean
Think about trying to have a healthier diet	4%	5%	13%	21%	57%	4.2
Plan to incorporate physical activity into your day	7	4	20	20	49	4.0
Read labels on food packaging	11	8	17	20	44	3.8
Think about portion size during mealtimes	13	7	20	21	39	3.7

- Current smokers are somewhat less likely to participate in any of the listed activities.
- Frequency of participation/deliberation tends to increase in tandem with the age of the respondent.

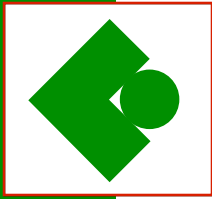


Fast Food Frequency

Of those who eat at fast food restaurants, respondents “supersize” their meal on average 2.6 times per month.

On an average, please tell me how many times in an average month you eat at a fast food restaurant?	Total Sample n=602	Respondents who eat at a fast food restaurant n=467
1 to 5 times per month	66%	85
6 to 10 times per month	9	11
11 or more times per month	3	4
None	22	—
Refused	0.3	—
Average number of times per month	2.9	3.7

- Households with children tend to be slightly more likely to eat at a fast food restaurant than other categories of respondents.

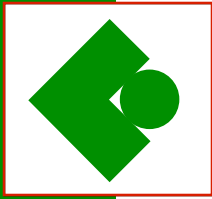


Exercise Program/Physical Activity Participation

On an average, please tell me how many times in an average month you participate in an exercise program or physical activity effort?	Wave IV
1 to 5 times per month	16%
6 to 10 times per month	12
11 to 20 times per month	31
21 to 30 times per month	22
31 or more times per month	2
NONE	17
Don't Know	0.2
Average number of times per month	13.7
Average number of times per month *	16.5

- Likelihood of participation increases in tandem with income.

* Based on respondents who indicated participating in an exercise program or physical activity

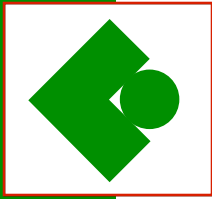


Plan to Incorporate Physical Activity

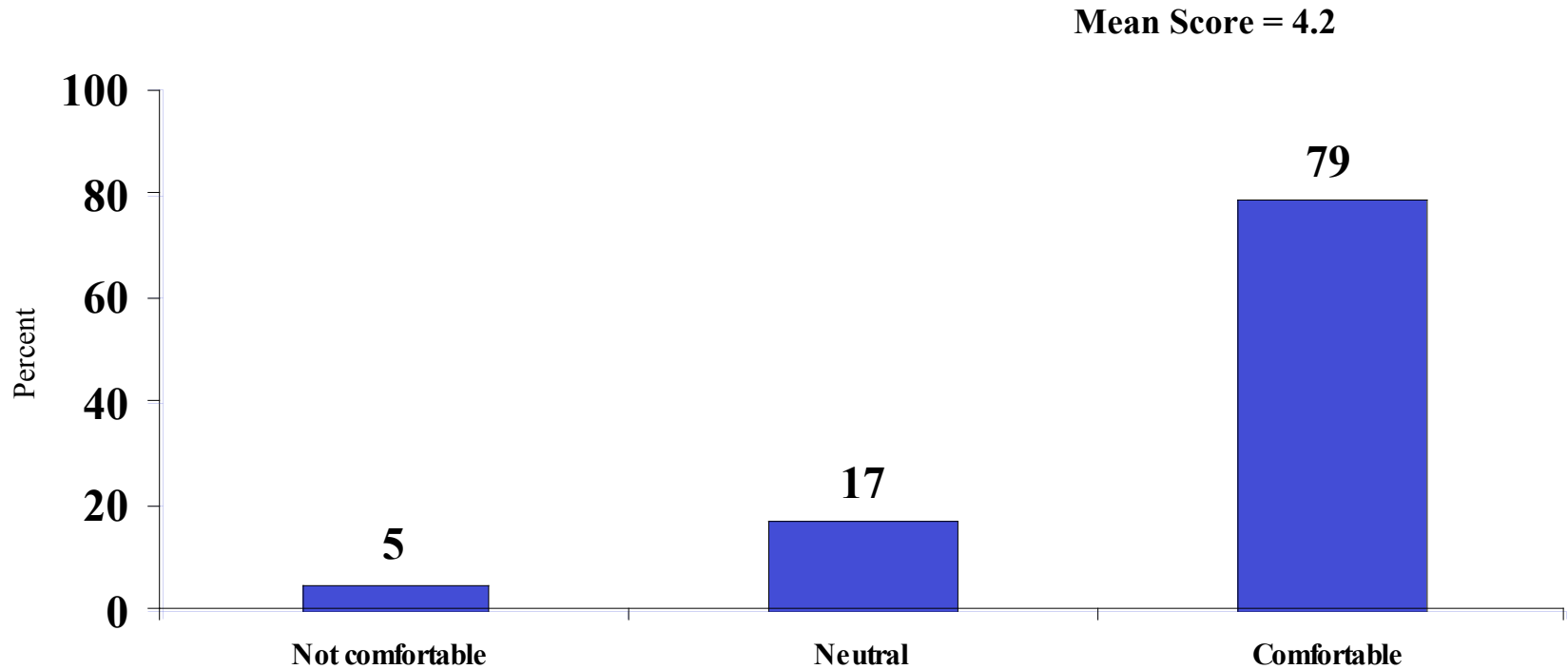
On an average, please tell me how many times in an average month you plan to incorporate physical activity into your daily routine?	Wave IV
1 to 5 times per month	19%
6 to 10 times per month	6
11 to 20 times per month	28
21 to 30 times per month	36
31 or more times per month	3
NONE	7
Don't Know/Refused	1
Average number of times per month	17.5
Average number of times per month *	18.8

- Smokers are slightly less likely to plan to incorporate physical activity into daily routines.

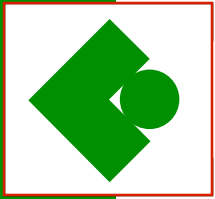
* Based on respondents who indicated planning to incorporate physical activity into their daily routine



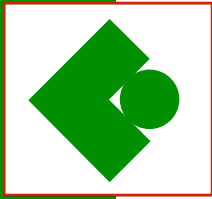
Proper Nutrition Knowledge: Level of Comfort



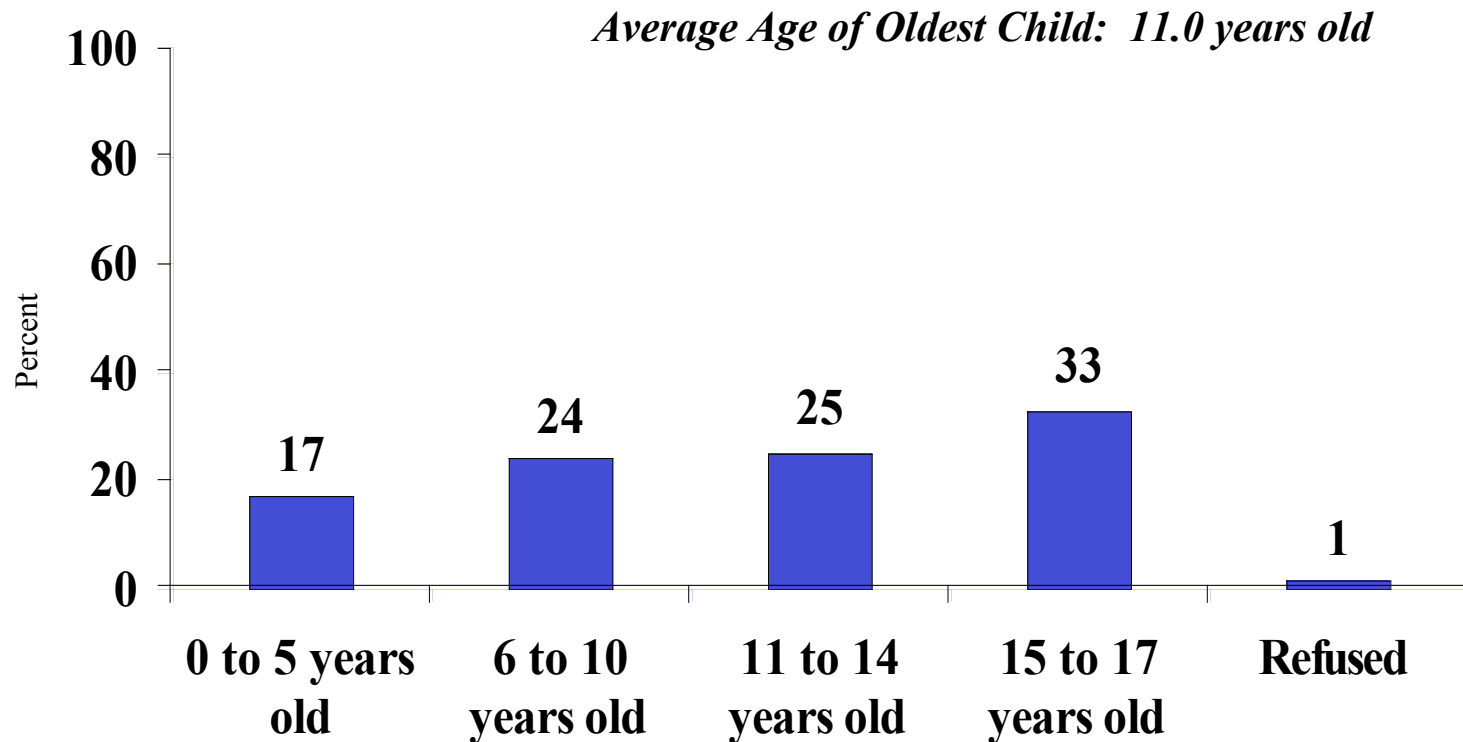
How comfortable do you feel with your level of knowledge about proper nutrition? Please use a scale where a 1 means “not at all comfortable” and a 5 means “very comfortable.”



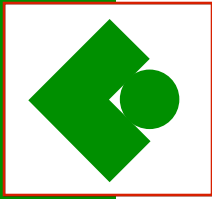
Attitudes and Habits Regarding Nutrition: Children



Age of Child: Oldest



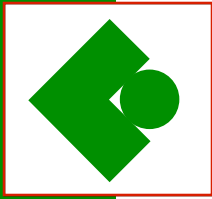
How old is your oldest child under the age of 18 living with you at least part of the time?



Frequency of Television Watching: Weekday

On an average weekday, how many hours of television does this child watch?	0 to 5 years old n=35	6 to 10 years old n=48	11 to 14 years old n=51	15 to 17 years old n=67
1 hour per day	26%	46%	24%	27%
2 hours per day	31	35	33	39
3 hours per day	9	4	24	6
4 hours per day	9	4	12	6
5 hours per day	3	4	—	5
6 or more hours per day	—	—	2	—
NONE	23	6	2	16
Don't Know	—	—	4	2
Average number of hours per day	1.6	1.7	2.4	1.7
Average number of hours per day *	2.1	1.8	2.5	2.1

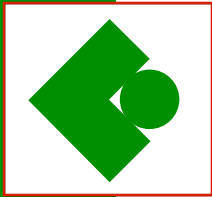
* Based on respondents who indicated child watches TV



Frequency of Television Watching: Weekend

On an average weekend day, how many hours of television does this child watch?	0 to 5 years old n=35	6 to 10 years old n=48	11 to 14 years old n=51	15 to 17 years old n=67
1 hour per day	29%	21%	10%	13%
2 hours per day	11	29	24	28
3 hours per day	11	23	18	16
4 hours per day	3	15	20	9
5 hours per day	9	4	12	6
6 or more hours per day	6	4	14	9
NONE	31	4	2	16
Don't Know	—	—	2	2
Average number of hours per day	1.7	2.5	3.5	2.5
Average number of hours per day *	2.5	2.6	3.6	2.9

* Based on respondents who indicated child watches TV

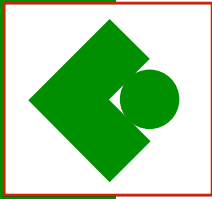


Fast Food Restaurant Patronage

On a weekly basis, how frequently do you take your child to fast food restaurants?	0 to 5 years old n=35	6 to 10 years old n=48	11 to 14 years old n=51	15 to 17 years old n=67
One time per week	40%	40%	41%	31%
Two times per week	3	10	2	3
Three times per week	—	2	2	3
Four times per week	—	—	—	—
Five times per week	—	—	—	2
NONE	57	48	55	60
Don't Know	—	—	—	2
Average number of times per week	0.5	0.7	0.5	0.5
Average number of times per week *	1.1	1.3	1.1	1.4

- Patronage of fast food restaurants tends to be slightly more frequent among residents of the Northern part of the state.

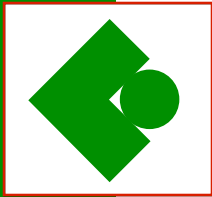
* Based on respondents who indicated taking child to fast food restaurant



Typical Fast Food Order

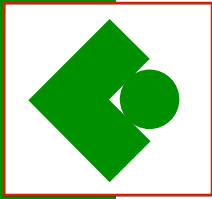
Do they typically order...*	0 to 5 years old n=15	6 to 10 years old n=25	11 to 14 years old n=23	15 to 17 years old n=27
Child's meal	93%	88%	30%	15%
Adult's meal	7	12	70	85

* Based on respondents who take their child to fast food restaurants



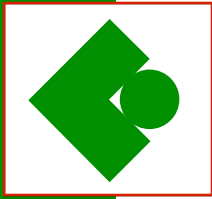
Type of School

Is this child currently attending a public, private or parochial school, or is this child home-schooled?	0 to 5 years old n=35	6 to 10 years old n=48	11 to 14 years old n=51	15 to 17 years old n=67
Public	9%	94%	94%	85%
Private	3	—	4	10
Parochial	—	2	—	3
Home-schooled	—	4	2	2
Child does not attend school	89	—	—	—



Overall Physical Activity Participation

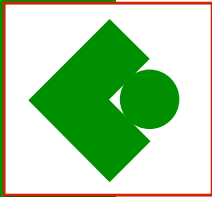
Does your child participate in any physical activity such as exercise or sports during the course of a week?	0 to 5 years old n=35	6 to 10 years old n=48	11 to 14 years old n=51	15 to 17 years old n=67
Yes	71%	96%	86%	79%
No	29	4	14	21



Physical Education/Gym Class Participation

How many times per week does your child participate in PE or Gym Class? (Based on children in school and exercise)	0 to 5 years old n=4	6 to 10 years old n=46	11 to 14 years old n=44	15 to 17 years old n=53
One time per week	25%	61%	18%	4%
Two times per week	25	24	27	15
Three times per week	25	11	18	21
Four times per week	—	2	7	6
Five times per week	—	—	21	19
Six times per week	—	—	—	2
NONE	25	—	7	28
Don't Know	—	2	2	6
Average number of times per week	1.5	1.5	2.6	2.4
Average number of times per week *	2.0	1.5	2.8	3.4

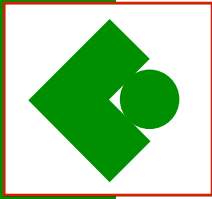
* Based on respondents who indicated child participates in PE or Gym class



After School Sport Participation

How many times per week does your child participate in an after school sport? (Based on children in school and exercise)	0 to 5 years old n=4	6 to 10 years old n=46	11 to 14 years old n=44	15 to 17 years old n=53
One time per week	—	15%	—	8%
Two times per week	—	22	14	4
Three times per week	—	13	21	15
Four times per week	—	7	18	13
Five times per week	—	4	11	32
Six times per week	—	—	—	4
Seven times per week	—	2	—	2
NONE	100	37	36	23
Average number of times per week	0.0	1.6	2.2	3.1
Average number of times per week *	—	2.6	3.4	4.0

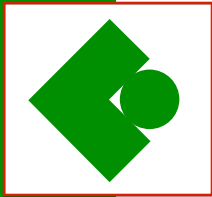
* Based on respondents who indicated child participates in after school sport



Gymnastics/Sports-Related Out-of-School Participation

How many times per week does your child attend a gymnastics or sports-related out-of-school class? (Based on children who exercise)	0 to 5 years old n=25	6 to 10 years old n=46	11 to 14 years old n=44	15 to 17 years old n=53
One time per week	16%	24%	9%	17%
Two times per week	8	9	9	8
Three times per week	—	9	18	2
Four times per week	—	4	5	4
Five times per week	—	2	5	8
Six times per week	—	—	—	4
Seven times per week	4	—	—	—
NONE	68	50	55	59
Don't Know	4	2	—	—
Average number of times per week	0.6	1.0	1.2	1.1
Average number of times per week *	2.1	2.0	2.7	2.7

* Based on respondents who indicated child attends a gymnastic or sports-related out-of-school class



Individual Physical Activity

How many times per week does your child do something physical on an individual basis (walk, run, jog)? (Based on children who exercise)	0 to 5 years old n=25	6 to 10 years old n=46	11 to 14 years old n=44	15 to 17 years old n=53
One time per week	—	9%	9%	8%
Two times per week	—	9	5	15
Three times per week	8	2	5	9
Four times per week	4	20	11	9
Five times per week	16	2	11	13
Six times per week	4	4	5	13
Seven times per week	52	52	50	19
NONE	12	—	2	13
Don't Know	4	2	2	—
Average number of times per week	5.3	5.4	5.3	3.8
Average number of times per week *	6.0	5.4	5.4	4.4

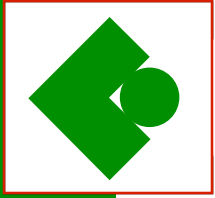
* Based on respondents who indicated child does something physical on an individual basis (walk, run, jog)



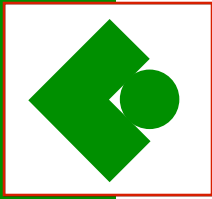
Healthy Eating and Drinking Habits

Please tell me how frequently your child does each of the following activities. *	0 to 5 years old	6 to 10 years old	11 to 14 years old	15 to 17 years old
Drink 100% fruit juice	4.2	3.5	3.6	3.6
Eat at least 5 servings of fruit and vegetables per day	3.6	3.3	3.0	2.9
Eat school lunches (based on children in school)	2.5	3.7	4.2	3.5
Eat packaged snacks	2.3	3.1	2.9	2.7
Drink fruit-flavored drinks	1.9	2.6	2.5	2.5
Drink regular soda	1.4	1.5	2.3	2.6
Drink diet soda	1.1	1.5	1.7	1.6

* Based on a scale where a 1 means “never” and a 5 means “always”

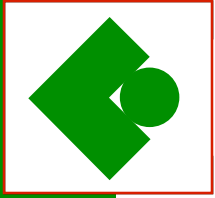


Additional Issues

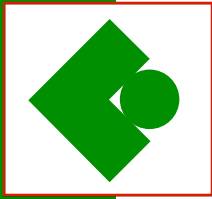


Frequency of Healthy Behaviors

Please tell me whether you agree or disagree with the following statements using a scale where 1 means that you “strongly disagree” and a 5 means you “strongly agree” with that statement.	Disagree	Neutral	Agree	Don’t Know	Mean
75% of Mainers die from four diseases that can largely be prevented through modifying behaviors	10%	25%	61%	4%	3.9
Maine has one of the highest rates of childhood obesity in the country	16	37	41	7	3.4

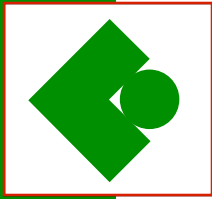


Strategic Implications



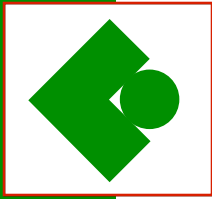
Observations on Mindset

- Issues of concern have shifted appreciably since the last wave of research, with concern for the economy and jobs in Maine surpassing all other concerns.
- Communications which stress the cost savings which can be realized by increasing healthy behaviors among the population of the state and link these savings to specific outcomes will have considerably more acceptance in this environment.
- Similarly, linking the high cost of fast food with the increased risk of poor nutrition may be a compelling message at this time.



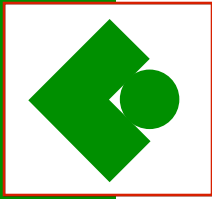
Observations on Mindset

- Respondents to this survey reflected high levels of concern for the mortality and morbidity associated with poor nutrition and lack of physical activity.
- When this perspective is coupled with reports of efforts to increase their personal health through active attempts to maintain good nutrition and acceptable levels of physical activity, it would appear that the population of Maine is very health conscious.
- The obvious contradiction between the health status of the population and stated health-focused intent highlights the fact that although respondents to the survey think they are well informed and pursuing healthy lifestyles, they are not currently focused on specific interventions and the impact these can have on their actual quality of life.
- Specific communications highlighting quality of life improvements as a result of these interventions may help to increase dissonance and subsequently actual compliance.



Observations on Messaging

- Television is by far the most frequently cited medium for messages and communications dealing with health issues, and is the most likely anticipated resource as a result.
- Projection of health concerns appears to be the norm for this population, four-in-ten of whom report being greatly concerned about the state of their own health but two-thirds of whom are greatly concerned about the health of a family member.
- Messages which stress the impact on others within the family of healthy nutrition and exercise would allow for these respondents to benefit from the intervention while still feeling altruistic about improving the health status of a family member.
- Although the majority of those surveyed indicated that they felt comfortable with their grasp of sound nutritional practices, the high frequency of fast food restaurant patronage belies this competence.
- Communications offering fast, inexpensive and healthy alternatives to fast food consumption would be particularly effective without overtly challenging this self-reported competence.



Observations on Messaging

- The frequency of watching television also underscores the dynamic of low physical activity, with the average child in households of these respondents passively watching television for ~2 hours per day on weekdays and nearly ~3 hours on weekend days.
- Communications citing the practical impact of substituting 30 minutes of TV time for 30 minutes of physical activity on a daily basis would help to encourage parents to initiate expectations of a more active leisure time for these children by highlighting the decreasing risk of obesity and related disease.