



BRANDS IN ***MOTION***

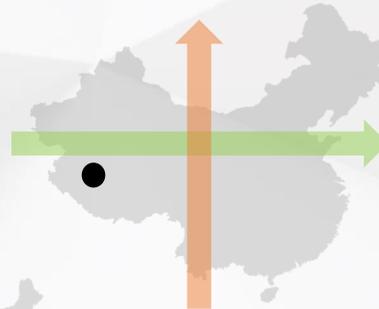
Business Healthcare Solutions/Supplies

Business Healthcare Solutions/Supplies **CATEGORY**

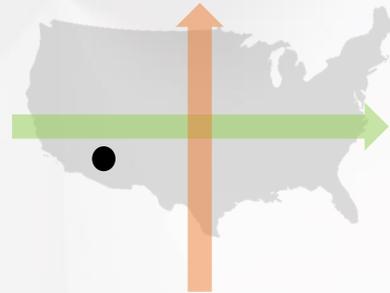
United Kingdom



China



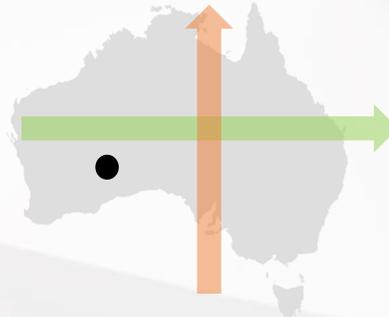
United States



Germany



Australia



Business Healthcare Solutions/Supplies:

Category defined as: Including employee healthcare plans, insurance, pharmaceuticals, machines, devices and supplies for hospitals and other healthcare-related industries.

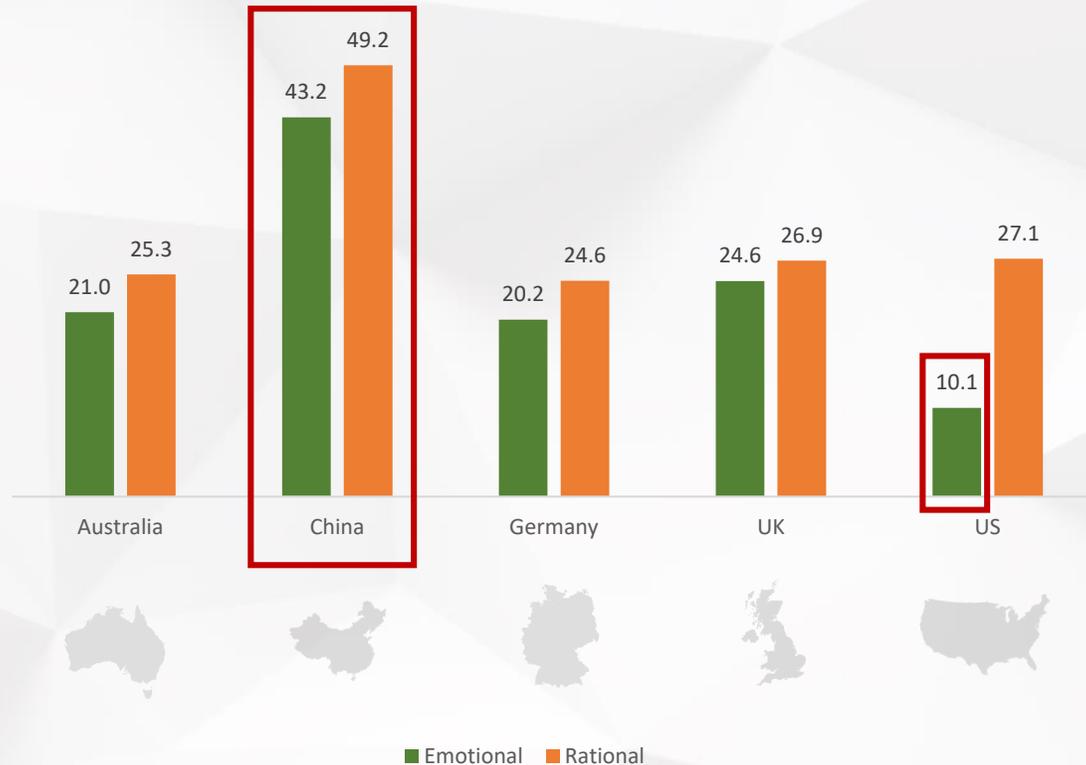
The category was surveyed in 5 of the 6 markets and in all but the UK the category is seen as a "Survivor" based on the average emotional and rational responses of those surveyed. UK was the only market in which the category is seen as a "Mover", higher than average emotional and rational responses by those respondents.

A total of 1,953 people answered questions specific to the category across the five markets surveyed.

(US: 419, UK: 547, China: 512, Germany: 231, & Australia: 231)



Business Healthcare Solutions/Supplies



OBSERVATIONS

- In all markets the average rational response was larger than the average emotional response.
- China had the largest average emotional and rational responses.
- US had the lowest emotional average response of any market surveyed.

Data represents an average respondent score on a scale of -100 to 100 across the ten category drivers. (6 Emotional and 4 Rational)

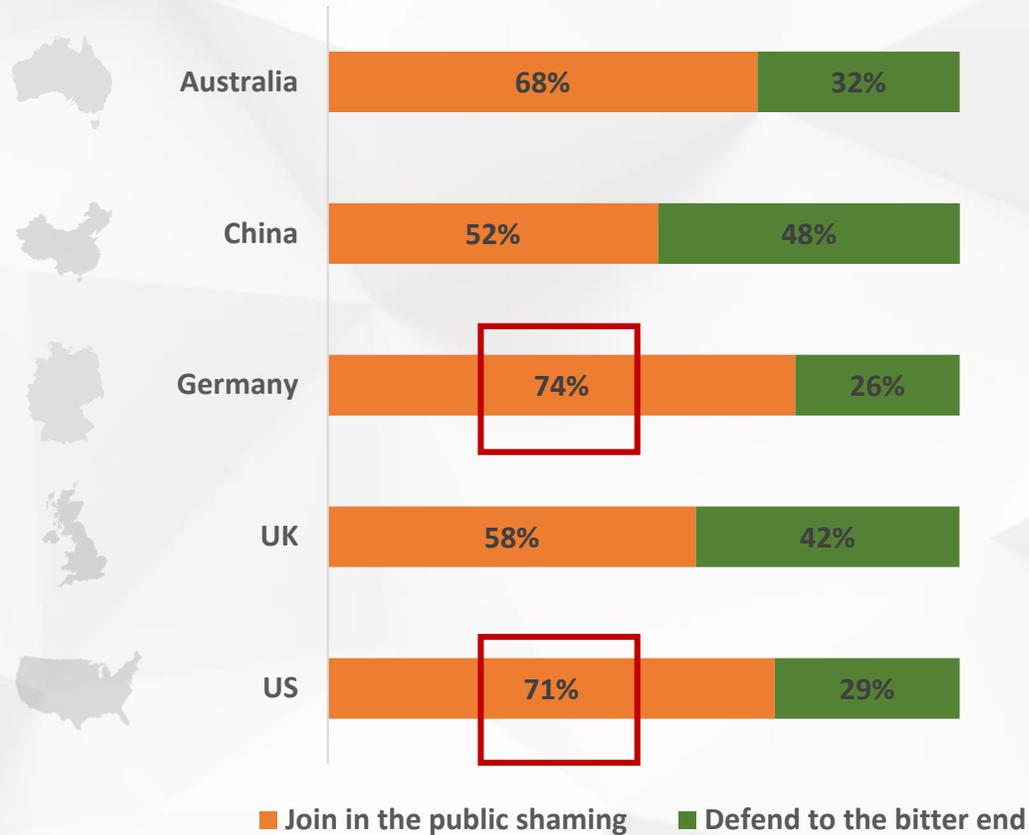




BRANDS IN ***MOTION***

Emotional Drivers

GLOBAL VIEW: **EMOTIONAL DRIVER**



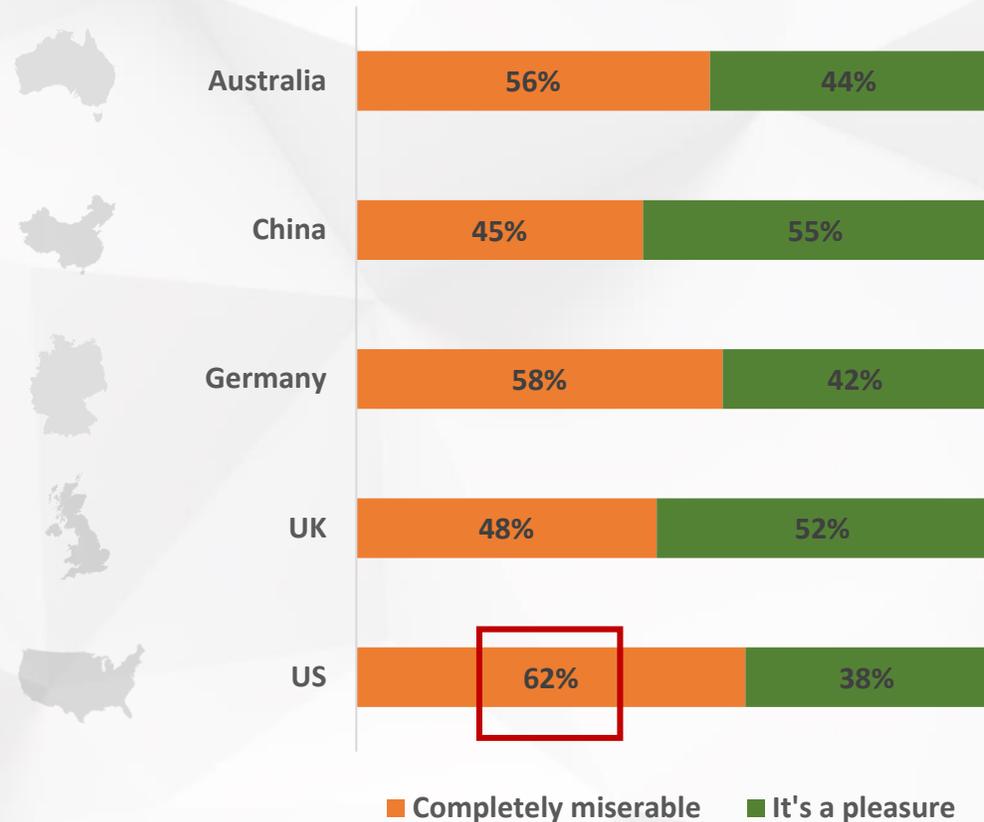
DEFEND OR SHAME

Suppose a Business Healthcare Solutions/Supplies company was publicly under attack for a product or service issue, would you?

- With more than 70%, respondents in Germany and the US markets were the most likely to “Join in the public shaming” if a company was under public attack for a product or service issue.



GLOBAL VIEW: **EMOTIONAL DRIVER**



EXPERIENCE

When interacting with Business Healthcare Solutions/Supplies companies, generally how is the experience?

- 62% of respondents in the US responded "Completely miserable" when asked generally how is the experience.



GLOBAL VIEW: **EMOTIONAL DRIVER**



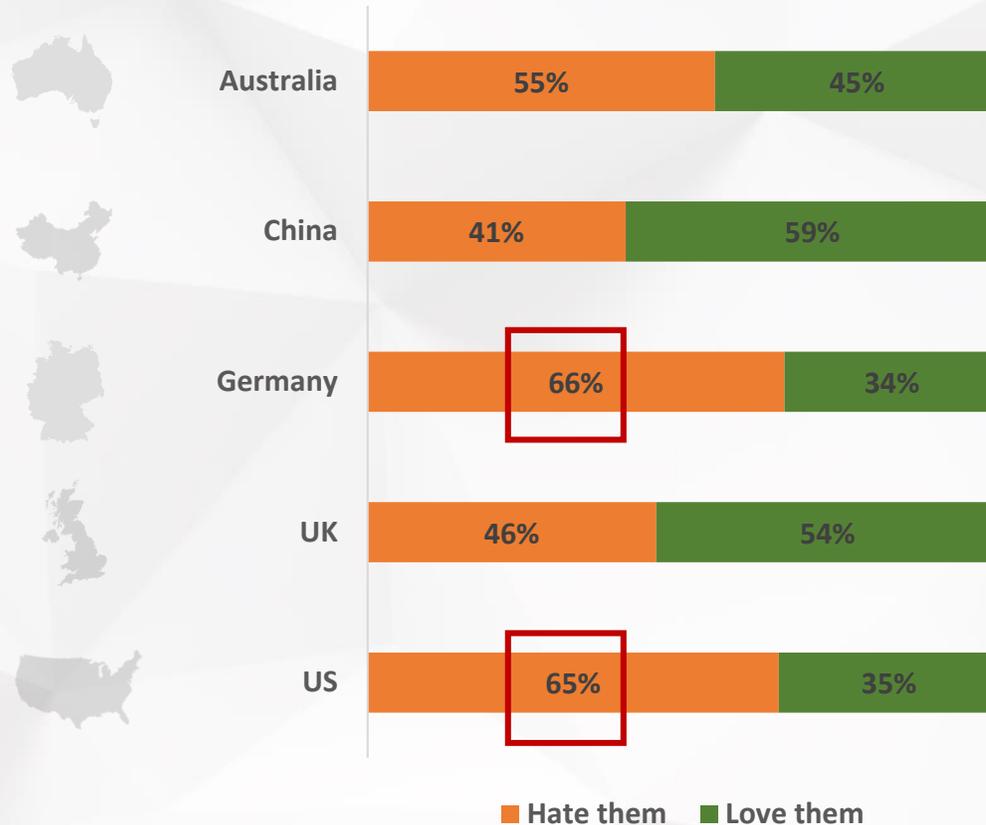
DISAPPEARED

If Business Healthcare Solutions/Supplies were to one day just disappear, how would you feel?

- 54% of the US respondents said "Good Riddance" to the disappeared driver.
- China had the highest percentage of respondents who said "I need it back" at 60%.



GLOBAL VIEW: **EMOTIONAL DRIVER**



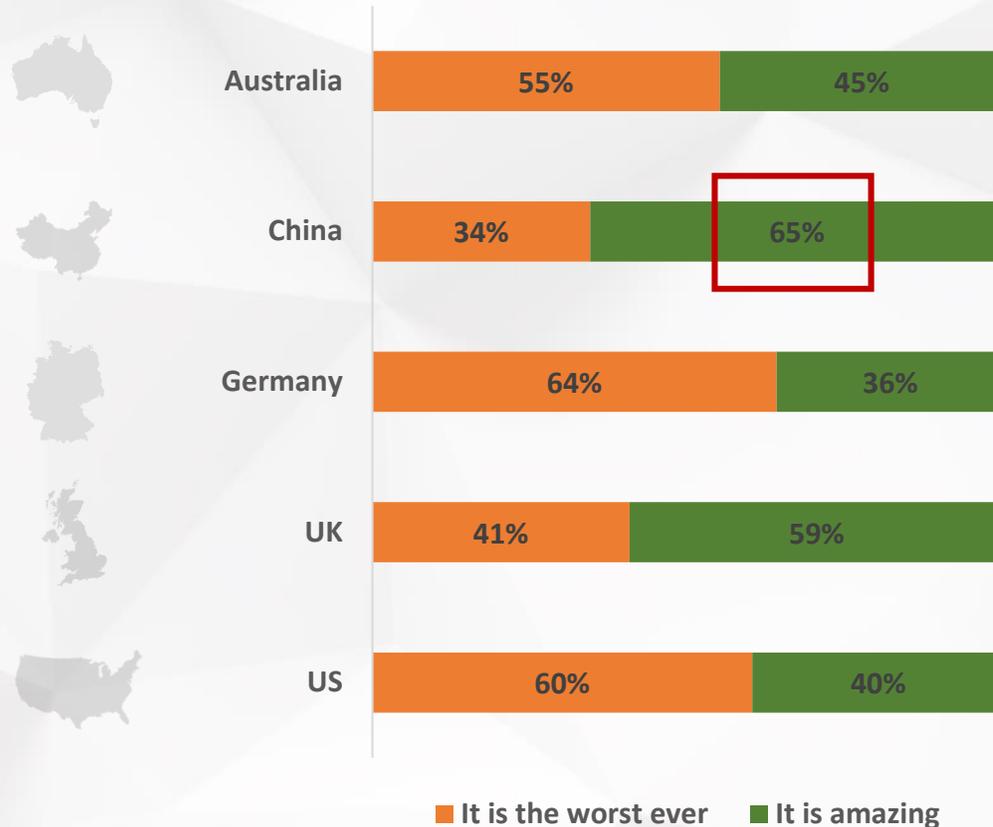
LOVE/HATE

When thinking about Business Healthcare Solutions/Supply companies do you generally...?

- Germany and the US expressed the least love for the category with more than 65% of respondents responding "Hate them".



GLOBAL VIEW: **EMOTIONAL DRIVER**



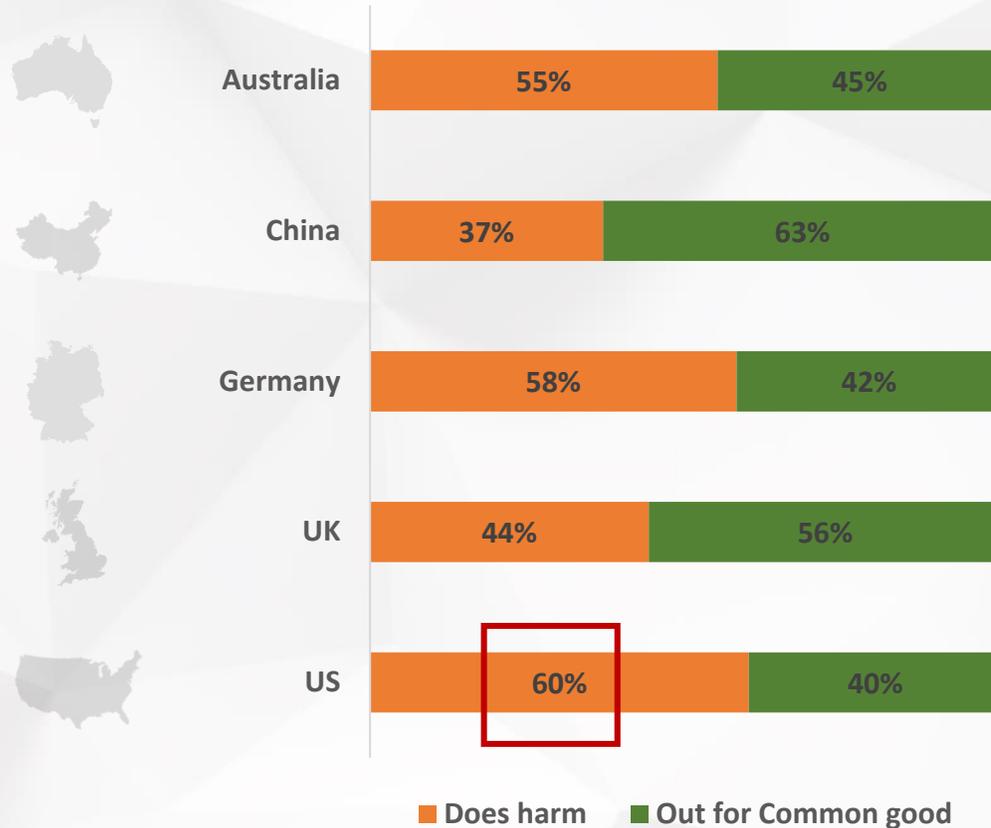
OVERALL IMPRESSION

What is your overall impression of Healthcare Solutions/Supply companies?

- Chinese respondents had the highest overall impression of the category with 65% saying "It is amazing".



GLOBAL VIEW: **EMOTIONAL DRIVER**



SOCIAL IMPACT

When thinking about Healthcare Solutions/Supply companies, what is their overall impact on society?

- At 60% responding "Does harm", respondents in the US had the highest negative view on this categories social impact.

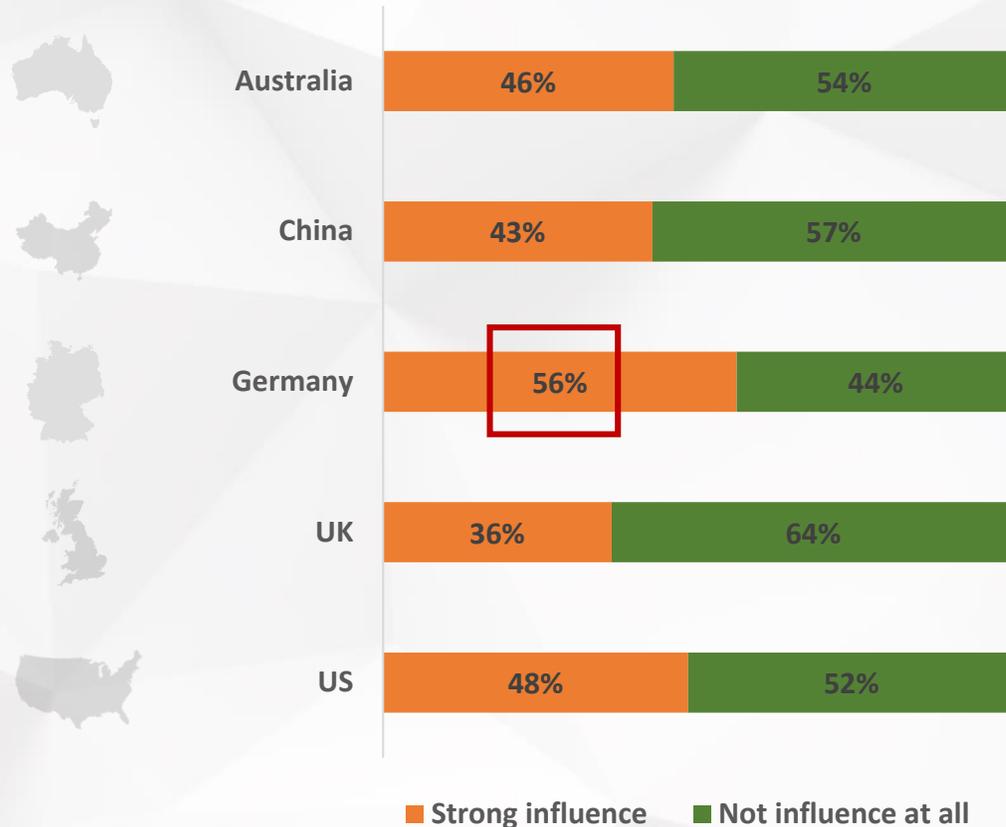




BRANDS IN ***MOTION***

Rational Drivers

GLOBAL VIEW: **RATIONAL DRIVER**



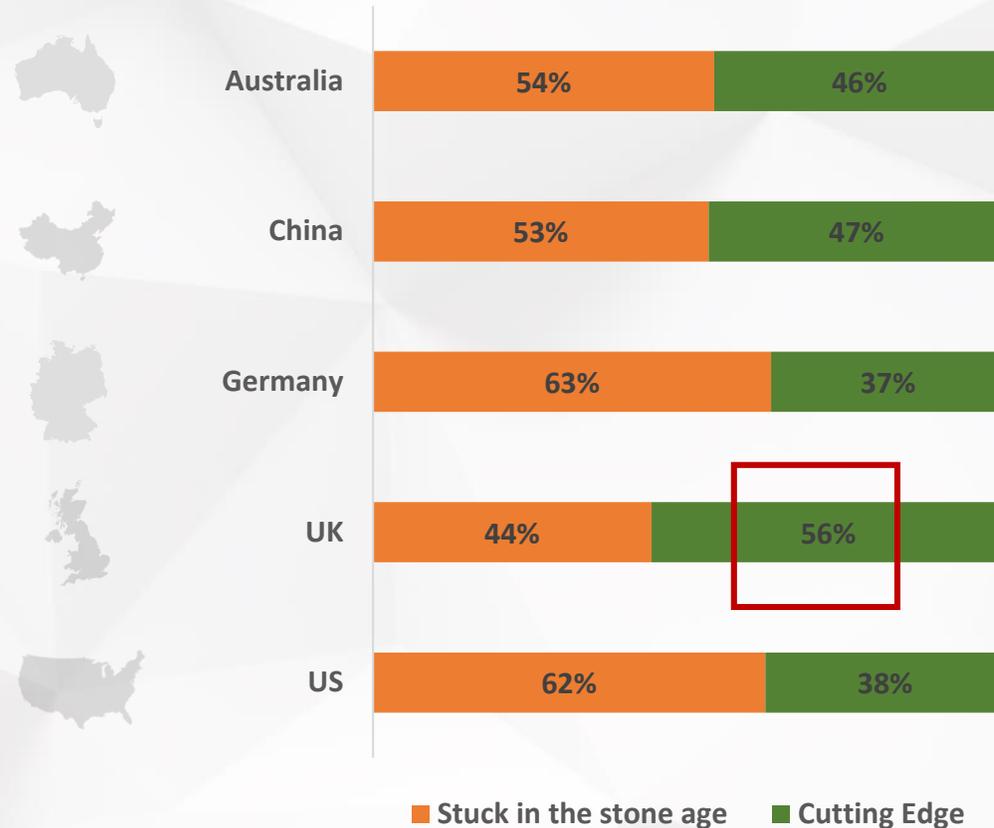
EXECUTIVE BEHAVIOUR

Would the behaviours of the executive leaders of a company in the Healthcare Solutions/Supplies industry influence your decision to support the brand or not?

- Over half of the respondents in Germany believe that the behaviours of the executive leaders of a company in this category have a strong influence on their decision to support a brand or not.



GLOBAL VIEW: **RATIONAL DRIVER**



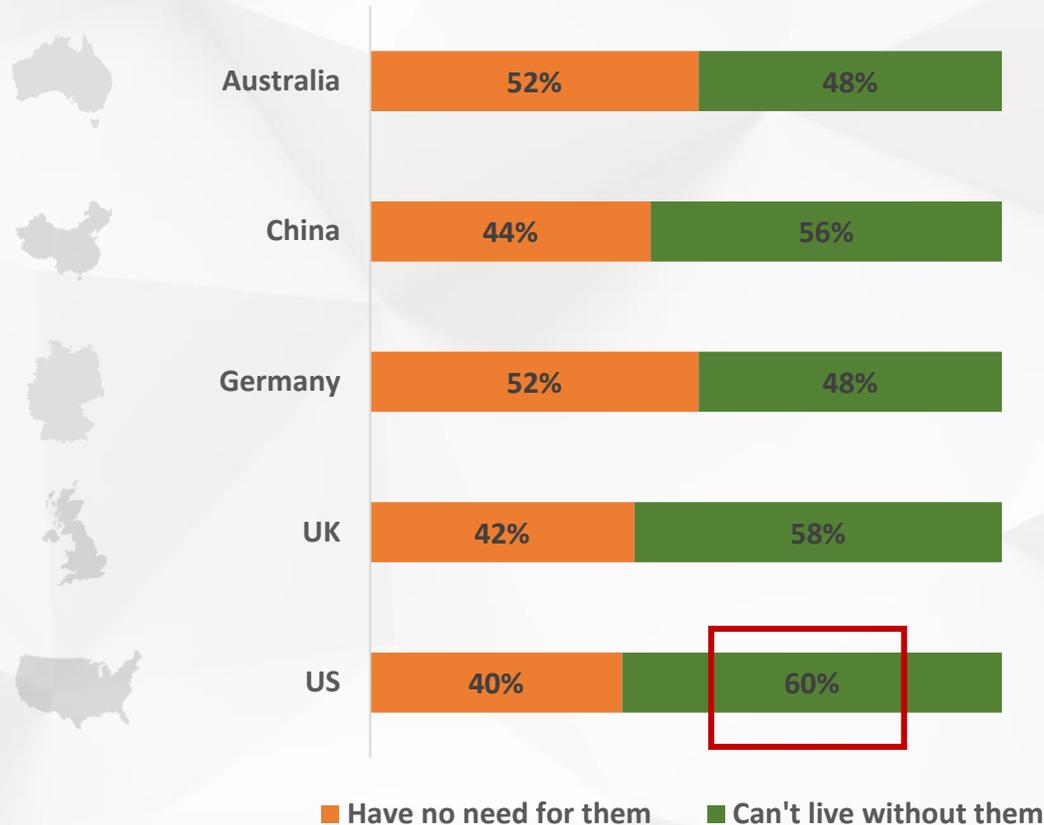
INNOVATION

How innovative are Healthcare Solutions/Supply companies?

- Over half of the respondents in the UK said "Cutting Edge" when asked how innovative companies are in this category.



GLOBAL VIEW: **RATIONAL DRIVER**



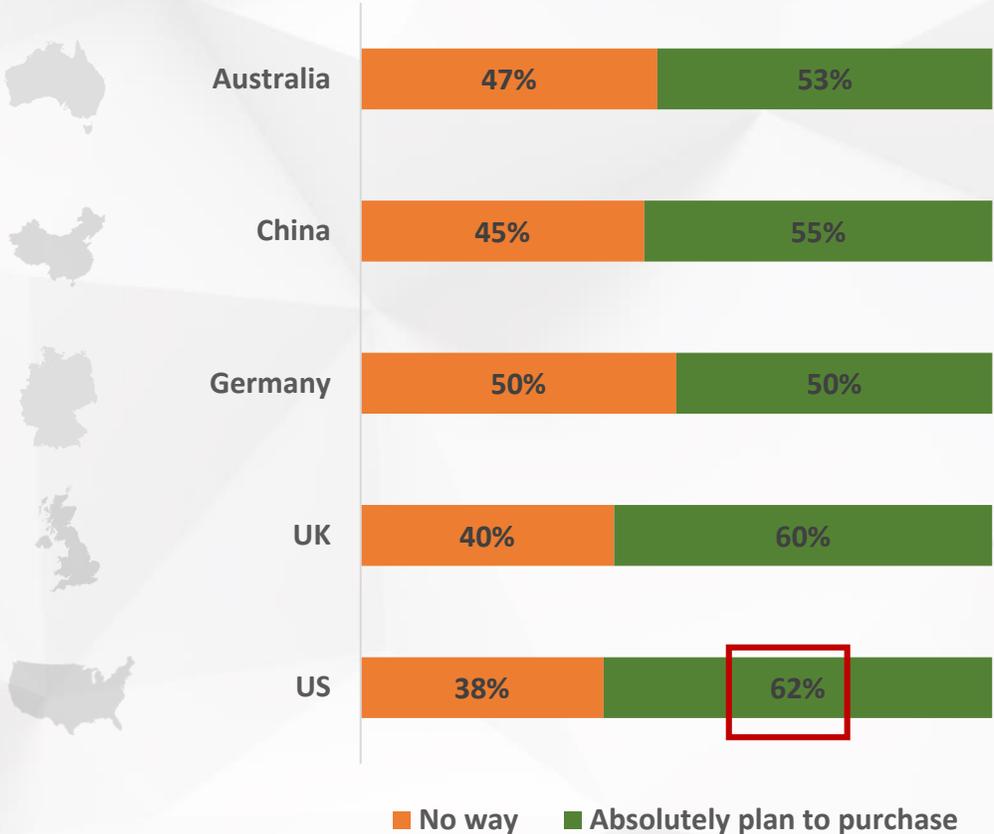
NECESSARY

How necessary are Healthcare Solutions/Supplies to your life?

- Respondents in the US expressed their reliance on the category with 60% saying “Can’t live without them” when asked how necessary the category is to their lives.



GLOBAL VIEW: **RATIONAL DRIVER**



INTENT TO PURCHASE

How likely are you to purchase products or services from Healthcare Solutions/Supply companies in the next year?

- Respondents in the US showed the highest purchase intent out of any market surveyed with 62% responding with “Absolutely plan to purchase”.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

