

Preventative Healthcare & Chronic Disease in America

A Collaboration between
The Rudd Center for Food Policy & Obesity
and Yankelovich, Inc.



November 1, 2005

Collaboration

The Rudd Center and Yankelovich are combining resources to drive powerful, lasting change in U.S. healthcare attitudes and behaviors

Three Key Areas of Focus:

1. Leveraging the Collective Learning
 - The Science
 - General Public/Consumer Insights
2. Expanding the Learning
 - Additional Research Initiatives
3. Executing on the Learning
 - Converting Insight into Action

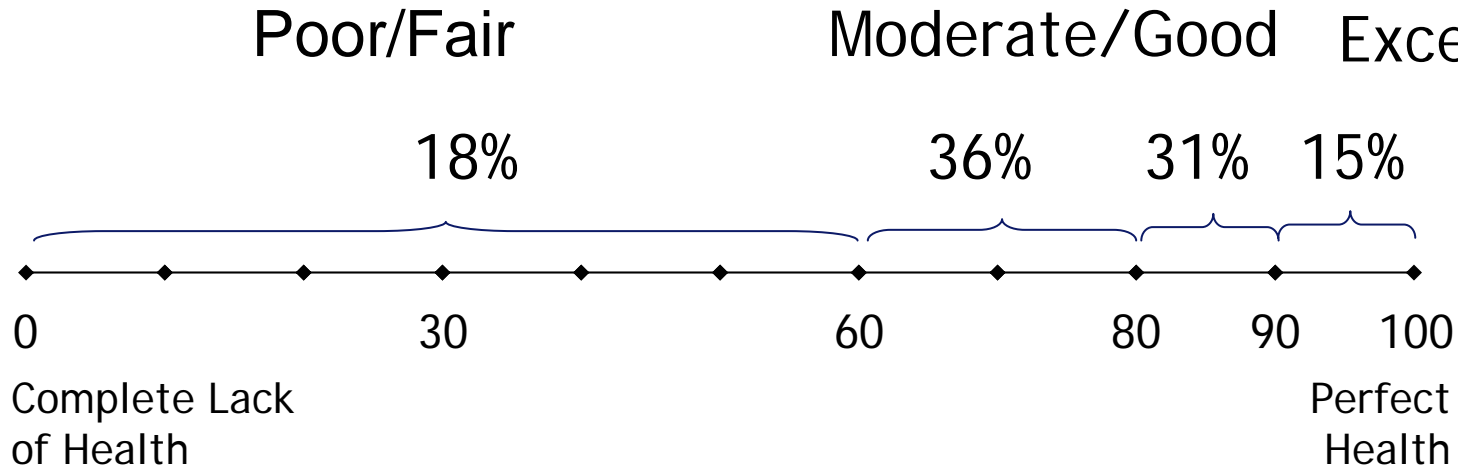
Yankelovich Preventative Health and Wellness Study Methodology

- Over 6,100 US Adults
- Online survey - 35 minute questionnaire
- Validated questionnaire
- Sample weighted to reflect U.S. Census
- Segmentation Analysis
- 26 Segment Profiles
- Scoring Algorithm, score the Yankelovich ConsumerConnect database of more than 230 million U.S. based adults

Survey Content

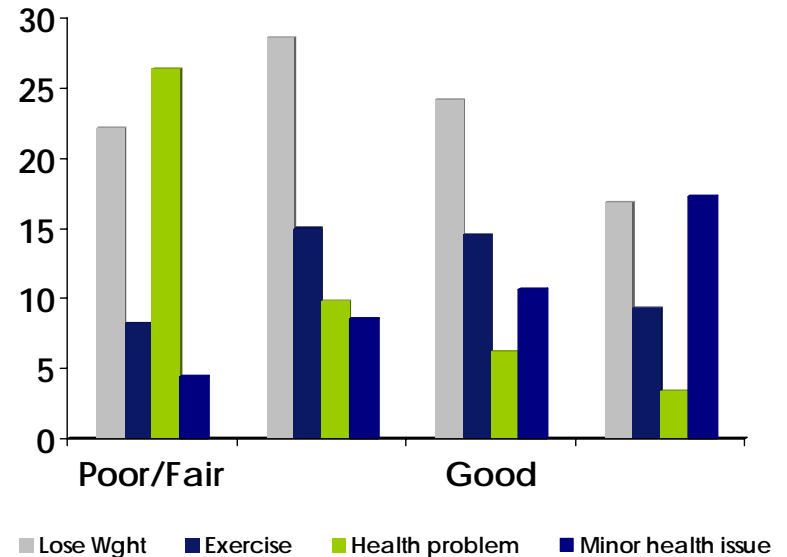
- Assessment of personal activity level
- Locus of Control
- Assessment of overall health, including factors that limit health and wellbeing
- Prioritization of health maintenance behaviors
- Personal and family member experience with chronic disease
- Evaluation of personal stress management strategies
- Compliance with medications and health screening guidelines
- Level of health education
- Barriers and drivers associated with weight management
- Barriers and drivers associated with exercise
- Barriers and drivers associated with tobacco use
- Experience with alternative medicine, vitamins and supplements
- Trusted health partners and information sources
- Experience with cosmetic treatments
- Message Framing
- Expectations of insurance providers
- Demographics

Self-Assessed Health Status



Why are you not a "100"?

- Need to lose some weight (20%*)
- Don't exercise enough (12%)
- Have a recent health problem/illness (11%)
- Minor health problems (flu/cold --10%)
- High blood pressure (9%)
- Bad back/knees/hips (8%)
- Diabetes (6%)
- Arthritis (6%)
- Allergies (5%)
- High cholesterol (5%)



* Open-ended; % mentioning

Health is a Personal Responsibility

"My physical well-being depends on how well I take care of myself"



85% agree

"I am directly responsible for my health"

82% agree

Current State of Preventative Health

- Nearly two-thirds of respondents are overweight, with more than 25% obese
 - Of those who are overweight, only 42% are actively pursuing a weight loss program
 - Of those who are obese, only 32% are actively trying to lose weight.
- One-in-four adults still smoke cigarettes on a regular basis
 - 94% of smokers claim their doctor knows they smoke but only 59% say their doctor has recommended specific methods to help them stop.
- Less than four-in-ten adults exercise (moderately) 3 days a week or more for 30 minutes at a time
 - 38% do not exercise at all
- 55% claim to have had an annual exam, but 21% haven't had one in more than 3 years. Interestingly, our doctor is perceived as our most trusted ally for preventative healthcare
- Nearly half of adults never or rarely use sunscreen
- We average 6.7 hours of sleep per night
- We watch 19 hours of television a week and surf the next for 17 hours but complain that we don't have enough time or are too tired to exercise and eat well

Preventative Measures

- Weight Management (Normal BMI)
- Exercise (3+ days/30 Minutes)
- Smoking
- Regular Screenings (mammogram, PAP smear, prostate, colorectal, dental, vision, hearing, blood pressure, cholesterol, and blood sugar checks)
- Annual Exam
- Daily Vitamin
- Use of sunscreen

Preventative Mindset

<p>Medium Attitude/Medium Action</p> <p>33% (26% men/38% women)</p>	<p>High Attitude/High Action</p> <p>23% (24% men/22% women) Increases with income and age</p>
<p>Low Attitude/Low Action</p> <p>26% (32% men/21% women) Decreases with income</p>	<p>High Attitude/Medium Action</p> <p>18% (17% men/19% women)</p>

Top 10 Ways to Maintain Health

Men

- Maintaining personal hygiene
- Maintaining a positive attitude
- Staying active
- Maintaining good family relationships
- Keeping stress manageable
- Keeping challenges in perspective
- Getting enough sleep
- Socializing with family/friends
- Not overindulging in alcohol
- Managing negative emotions

Diet ranks 11
Exercise ranks 16

Women

- Maintaining personal hygiene
- Maintaining a positive attitude
- Maintaining good family relationships
- Keeping stress manageable
- Getting enough sleep
- Keeping challenges in perspective
- Staying active
- Socializing with family/friends
- Managing negative emotions
- Eating a well-balanced diet

Exercise ranks 17

Activity Limited By Health Issues

Upper Income - (>\$100k)

5.23 Days

- Fatigue 49%
- Cold/Flu 55%
- Depression/Anxiety 16%
- Back/Neck Pain 23%
- Joint Pain 21%
- Arthritis 9%
- PMS (women) 11%
- Lung/Breathing problem 8%
- Eye/Vision problem 2%
- Oral/Dental problem 7%

Low Income (<\$25k)

10.81 Days

- Fatigue 63%
- Cold/Flu 45%
- Depression/Anxiety 38%
- Back/Neck Pain 37%
- Joint Pain 32%
- Arthritis 25%
- PMS (women) 15%
- Lung/Breathing problem 18%
- Eye/Vision problem 15%
- Oral/Dental problem 11%

Been Diagnosed With...

Men (2.74 mentions)

- Allergies 37%
- High Blood Pressure 34%
- High Cholesterol 31%
- Overweight/Obese 26%
- Acid Reflux 20%
- Diabetes 14%
- Migraines/Headaches 14%
- Depression 12%
- Insomnia 12%
- Osteo Arthritis 11%
- Asthma 10%
- Impotence 13%

- (16% older than 61)

Women (2.91 mentions)

- Allergies 47%
- High Blood Pressure 22%
- High Cholesterol 22%
- Overweight/Obese 31%
- Acid Reflux 18%
- Diabetes 9%
- Migraines/Headaches 32%
- Depression 21%
- Insomnia 12%
- Osteo Arthritis 16%
- Asthma 17%

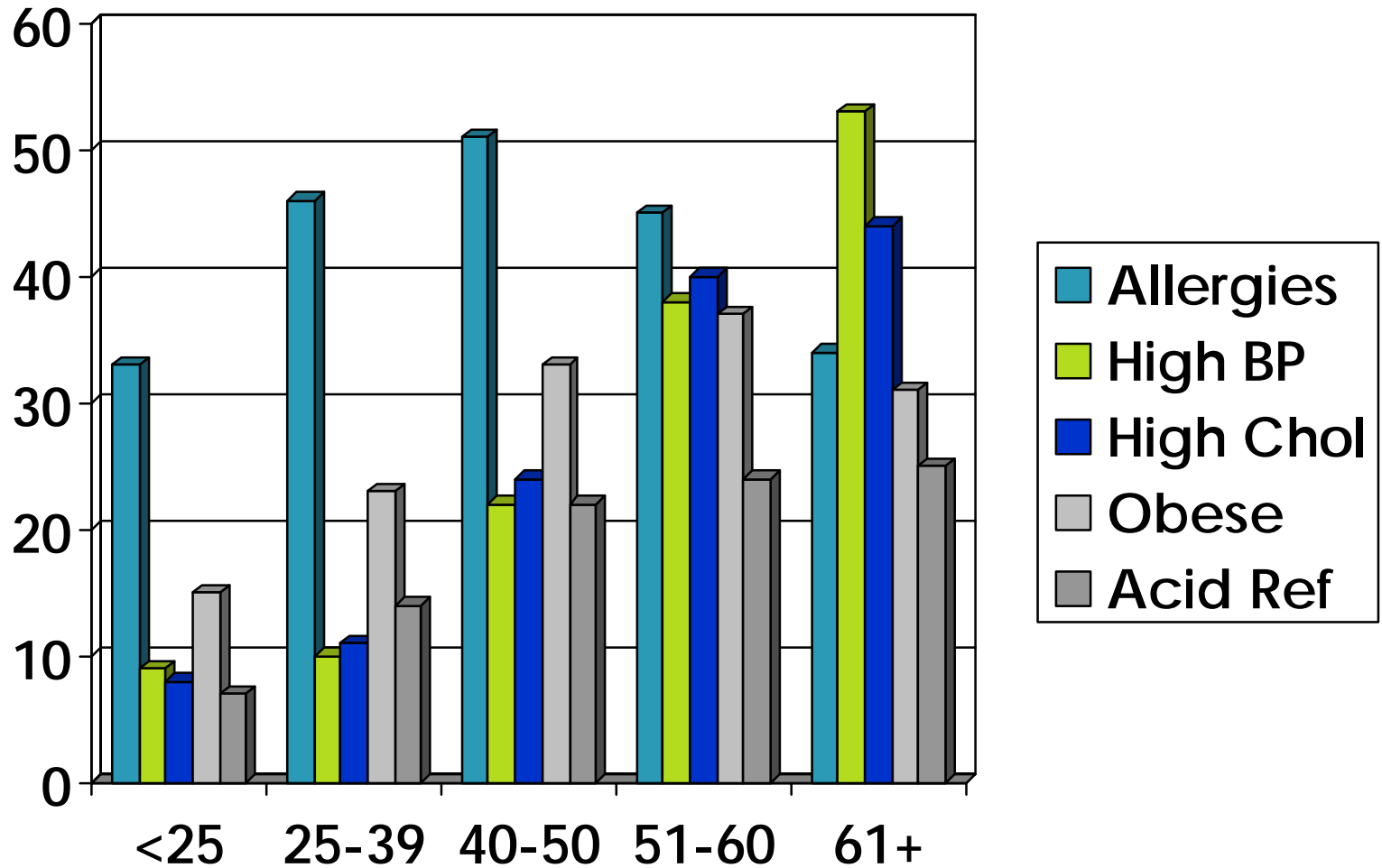
Been Diagnosed With...

	Self	Spouse/Partner	Parent/Sibling/Child
Allergies	43%	25%	28%
High Blood Pressure	27%	19%	23%
High Cholesterol	26%	16%	16%
Overweight/Obese	29%	15%	15%
Acid Reflux	19%	14%	11%
Diabetes	11%	7%	15%
Migraines	24%	10%	12%
Depression	17%	6%	10%
Osteo Arthritis	14%	7%	7%

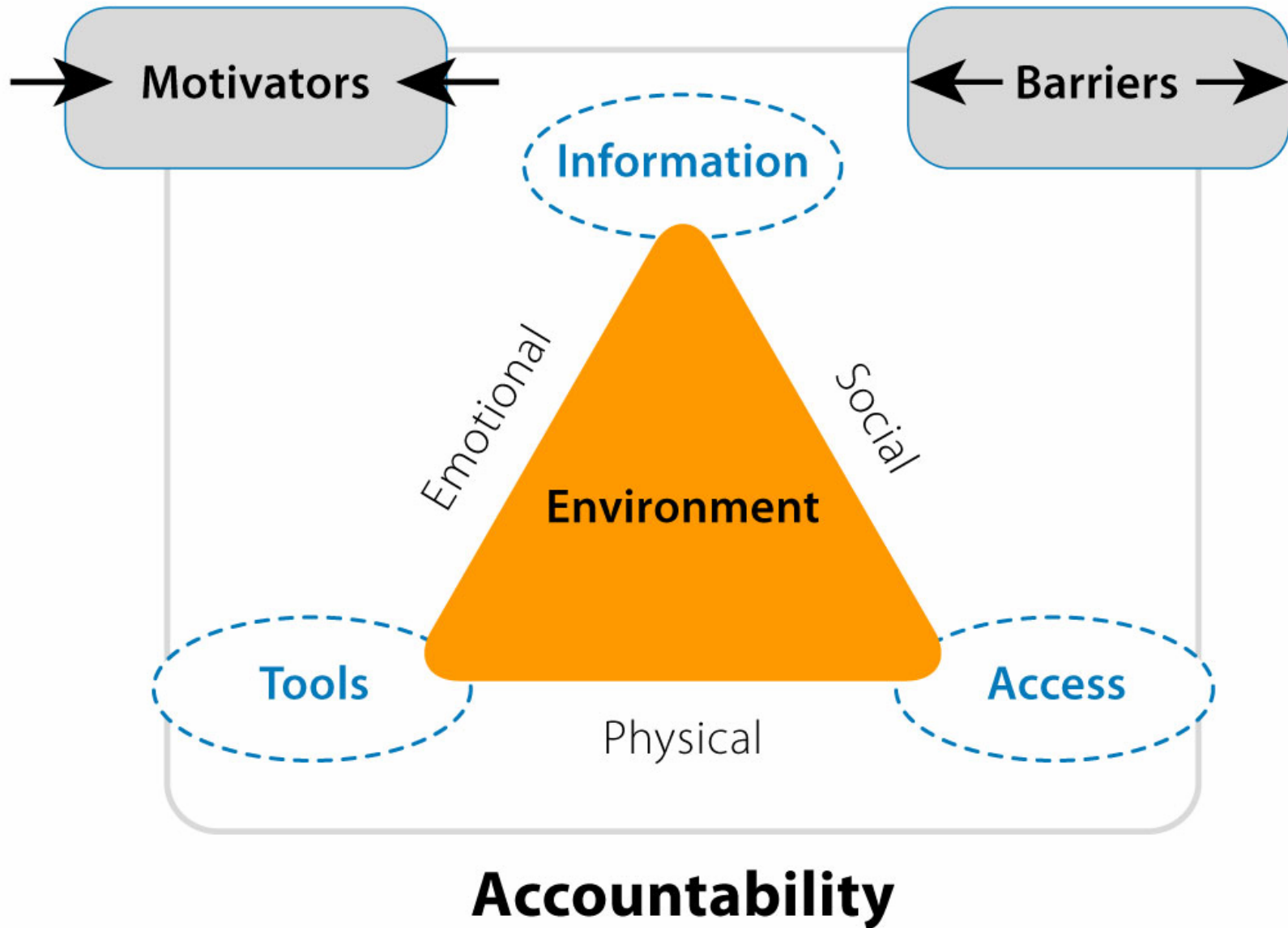
Taking Medication For...

	Prescription	OTC	Both
Allergies	22%	42%	13%
High Blood Pressure	81%	--	2%
High Cholesterol	57%	4%	2%
Overweight/Obese	3%	6%	1%
Acid Reflux	43%	29%	9%
Diabetes	73%	--	3%
Migraines	19%	51%	14%
Depression	64%	2%	2%
Osteo Arthritis	32%	31%	10%

Chronic Disease x Age



Closing the Gap Between What We Know and What We Do



Thank You

For More Information on the
Yankelovich “Preventative Health and Wellness in America” study
please contact: Steven Bodhaine

919-932-8606

sbodhaine@yankelovich.com

