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## Executive Summary

### Perceptions and facts: the conundrum of health in America

- **The disparity between respondents' perceptions of their health and statistics about the health of the American population is one of the central themes of this report, and serves as the lens through which much of the data should be analyzed.**

About half of respondents consider it 'very important' to live a healthy lifestyle, and about four in ten consider it somewhat important. **Eating a balanced diet, regular exercise, and getting the right amount of sleep** are the three factors respondents most often cite as contributing to healthy living. **The more educated and affluent the individual, the more likely he/she will follow a healthy regimen.**

**Respondents have a rosy picture of their health.** About seven in ten respondents say they are either in good or excellent health, and not surprisingly younger respondents are more likely to have positive perceptions. According to the Deloitte Center for Health Solutions' *Connected Care*, though, some 100 million Americans have chronic illnesses, including heart disease, diabetes, hypertension, and back pain.

### Healthy living gets harder during the recession

Healthy living during the current recession poses a significant challenge. An April 2009 article in *The New York Times* reported that American Psychological Association, the National Sleep Foundation, and the National Suicide Prevention Lifeline have been flooded with calls, requests for referrals, etc. *The Wall Street Journal* reported in April 2009 that more Americans are opting to not fill prescriptions because of the economic downturn.

### Obesity and the graying of America pose challenges

Chronic illnesses and the obesity epidemic are arguably the two greatest barriers to healthy living.

- The demographics experiencing the greatest growth from 2004 to 2014 are 54-64s and 65-74s. According to the Institute on Aging, the following are some of the more common illnesses associated with aging: Alzheimer's Disease, arthritis, anxiety, cancer, cataracts, congestive heart failure, coronary disease, depression, dementia, diabetes, heart disease, high blood pressure, high cholesterol, osteoporosis, and stroke.
- According to the Deloitte Center for Health Solutions' *Connected Care*, 66% of Americans are either obese or overweight. Congestive heart failure, heart disease, diabetes, stroke, and some types of cancer are just a few of the diseases linked with obesity.

### Insights and Opportunities

- An ounce of cure is worth a 533 pounds of prevention: According to Trust for America's Health 2008 report, *Prevention for a Healthier America: Investments in Disease Prevention Yield Significant Savings, Stronger Communities*, **spending \$10 per person on proven programs like smoking cessation and physical activity could save \$16 billion annually in health costs.**

- **Drive-thru medical care:** Clinics in drugstores and shopping malls are popping up around the country to provide an inexpensive and convenient healthcare solution. **In the light of the recession and soaring healthcare costs, companies should try to ally themselves with this new channel.**
- **A growing appetite for healthy fast food:** Research in this report shows that about half of respondents (and six in ten affluent ones) like the trend of healthy fast food.
- **Online tools: the next big thing:** Respondents are flocking en masse online to use a wide variety of online tools (calorie counters, glucose index tracking, meal planner, fitness log, etc.). Companies would do well to enhance their efforts in this area.

## Other perceptions about general health

Fewer than half of respondents have regular medical checkups, and about one in three frequently take preventive medication. Cancer, heart disease, strokes, and vision problems are the four ailments respondents are most concerned about developing, while vision problems, obesity, and arthritis are the three ailments most diagnosed. **Based on national rates for these diseases, it appears that respondents are under-reporting their ailments, or are unaware of them.**

## Attitudes towards exercise

Attitudes towards exercise is another topic in which perceptions seem to conflict with facts. **Seven in ten respondents think they should exercise more often, but they also consider exercise to be one of the top three keys to healthy living.** About four in ten respondents say they exercise three to five times per week, and about one in seven exercise 6+ times a week. Younger and affluent respondents are more likely to exercise than older and less-affluent respondents.

## Stressors change with age

Age plays a role in what external factors respondents find to be stressful. For example, younger respondents cite 'stress in my personal life' and 'not getting enough sleep,' while older respondents are more likely to cite debt and disease. The three most-cited stressors are: debt (15%), stress in my personal life (11%), and not getting enough sleep (9%)

## Attitudes towards food

Respondents hold conflicting attitudes towards food, with about the majority saying they are trying to eat healthier and about the same amount saying they eat what they like regardless of calories. About half of respondents like the trend towards healthier fast foods, but about half do not look at product labels.

## Attitudes towards dieting

**A little more than half of respondents are on a diet. Almost the same amount says they often over-eat.** Losing weight, controlling cholesterol, and maintaining weight are the three reasons respondents most frequently cite for dieting.

## Reaching the masses

In general, the three sources respondents turn to for health-related information are: a conventional/traditional doctor; a website; and health-related magazines, such as *Self*, *Men's Health*, *Prevention*, or *Cooking Light*. **Respondents 18-24 are the most voracious gatherers of health information, and are more likely to turn to the internet, blogs, health-related magazines, a spouse or family member, books, friends and colleagues, and other sources for information about general health and exercise.**

