

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"With constant innovations in the healthcare market, consumer health management continues to evolve.

Americans continuously look for ways to save money and keep themselves and their families healthy, providing a plethora of ways for companies and brands to interact with

- Emily Krol, Health and Wellness Analyst

# This report looks at the following areas:

- · Retail health clinics are changing the healthcare landscape
- Innovations in technology impact how people manage their health
- Consumers are more proactive about their personal health

Personal health management is taking on a new role. Several factors are impacting healthcare, resulting in an increased focus on consumers being proactive about their own health. The ACA (Affordable Care Act) has changed nearly every aspect of healthcare. Meanwhile, diseases such as diabetes and obesity have become more prevalent in recent years. This comes at a time when the US population is experiencing significant growth among the older population, resulting in an increased demand for healthcare. Furthermore, innovations in technology have made it easier for people to keep track of and manage their own health, as well as interact with a professional.

This report will explore consumer attitudes and behaviors toward managing personal health as well as usage of professional healthcare services.

# BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

+1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

# **Table of Contents**

# Scope and Themes

What you need to know

Definition

Data sources

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

# **Executive Summary**

# Demographic shifts affect healthcare market

# Other factors that affect healthcare

Figure 1: Visitation to healthcare provider past 12 months, November 2014

Healthful habits

# Selecting a healthcare provider

Figure 2: Importance of factors when selecting a healthcare provider (top three), November 2014

# Using technology to manage health

Figure 3: Usage and interest in tools to manage health, November 2014

What we think

# Issues and Insights

Retail health clinics are changing the healthcare landscape

The issues

The implications

Innovations in technology impact how people manage their health

The issues

The implications

Consumers are more proactive about their personal health

The issues

The implications

# Trend Applications

Trend: Prepare for the Worst
Trend: Help Me Help Myself
Trend: Data Creators

Market Drivers – Demographic Factors

Key points

Aging population affects need for healthcare services

Figure 4: US population, by age, 2014-19

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

# US population becoming more diverse

Figure 5: Population, by race and Hispanic origin, 2009-19

#### Fewer households with kids

Figure 6: Households, by presence of children, 2003-13

# Population density

# Market Drivers - Other Factors

# Key points

#### Incidence of health insurance

Figure 7: Percentage of uninsured Americans, 2002-12

#### Affordable Care Act

# Household income stabilizing, remains weak

Figure 8: Median household income, in inflation-adjusted dollars, 2002-12

#### Obesity rates continue to increase

Figure 9: Percentage of people aged 20 or older who are of healthful weight, overweight, or obese, 2001-12

# Government and community initiatives

Healthcare scares

#### Innovations and Innovators

# Retailization of healthcare

Apps

Technology

Wearables

# Marketing Strategies

# Overview of the brand landscape

# Health insurance companies take consumer approach

Figure 10: Cigna Health Matters, October 2014

Figure 11: Humana: Partners in Health, September 2014

# Wearables promote motivation

Figure 12: Nike+ FuelBand SE | What It Is: LED Lights, February 2014

# CVS Health becomes a healthcare provider

Figure 13: Raise A Glass - CVS Health TV Commercial 2014

Figure 14: Tick Tock - CVS Health TV Commercial 2014

# Healthcare providers become personal

Figure 15: Northwestern Medicine: Our breakthroughs are your breakthroughs

# Personal Health Management

# Key points

# Healthful habits are prevalent

Figure 16: Health habits, April 2013-June 2014

Exercise most important to managing health, but other factors also noted

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 17: Factors important to health management, November 2014

# Confusion about healthcare options

Figure 18: Attitudes toward health management, by suffer from nonlife-threatening condition, November 2014

# Self-treatment motivates approach to health

Figure 19: Attitudes and opinions about health and medicine, by age, April 2013-June 2014

#### Professional Care Visits

# Key points

# Primary care physician trumps other healthcare sources

Figure 20: Visitation to healthcare provider, November 2014

#### Women, older consumers more likely to visit primary care physician

Figure 21: Attitudes toward doctors, by age, January 2013-March 2014

Figure 22: Visited primary care physician in past year, by demographics, November 2014

# Visits to hospitals more prevalent among younger, lower income

Figure 23: Visited hospital in past year, by demographics, November 2014

# Urgent care clinics growing

Figure 24: Visited urgent care in past year, by demographics, November 2014

## Retail health clinics provide convenience

Figure 25: Visited retail health clinic in past year, by demographics, November 2014

# Alternative health management

Figure 26: Attitudes toward health management, by gender, November 2014

# More personalized services

# Selecting a Healthcare Provider

# Key points

# Consumers have limited control over healthcare providers

Figure 27: Importance of factors when selecting a healthcare provider (top three), November 2014

# Differences by demographics

# Important factors by healthcare provider type

Figure 28: Correspondence Analysis, visits to healthcare provider and important factors when choosing a healthcare provider,

November 2014

Figure 29: Description of healthcare providers, November 2014

# Prescription Drugs and Health Conditions

# Key points

# Prevalence of health conditions and prescription drug usage

# Health conditions and prescription drug usage more prevalent among women and older respondents

Figure 30: Healthcare conditions, by age, November 2014

# Health conditions suffered

Figure 31: Ailments suffered from, by age, April 2013-June 2014

# Attitudes toward prescription drugs

Doctor plays a strong role in recommendation



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

# Drug costs are concerning

Figure 32: Attitudes toward prescription drugs, by age, April 2013-June 2014

#### Role Technology Plays

# Key points

Technology lends itself to self-diagnosis

An app a day

Fitness trackers key for motivation

Sharing information

#### Interacting with doctor

Figure 33: Usage and interest in tools to manage health, November 2014

# Technology can be especially useful to parents

Figure 34: Usage and interest in tools to manage health – Any usage, by presence of children in household, November 2014

#### Health monitoring tools help measure results

Figure 35: Types of health monitoring devices used, by age, April 2013-June 2014

# Impact of Race and Hispanic Origin

#### Key points

Black Americans interested in learning about health

Newly insured Hispanic Americans more engaged with health

# Asian Americans adopt healthful habits

- Figure 36: Health habits, by race/Hispanic origin, April 2013-June 2014
- Figure 37: Healthcare coverage, by race/Hispanic origin, November 2014
- Figure 38: Visited healthcare provider past 12 months, by race/Hispanic origin, November 2014
- Figure 39: Importance of factors when selecting a healthcare provider (top three), by race/Hispanic origin, November 2014
- Figure 40: Usage and interest in tools to manage health Would use in the future, by race/Hispanic origin, November 2014
- Figure 41: Attitudes toward health management, by race/Hispanic origin, November 2014

# Appendix - Other Useful Consumer Tables

# Prevalence of obesity

- Figure 42: Prevalence of obesity by race and Hispanic origin, among adults aged 20 and over, US 2011-12
- Figure 43: Percentage of people aged 20 or older who are of healthful weight, overweight, or obese, by gender, 2009-12

# Personal health management

- Figure 44: Healthful habits, by demographics, January 2013-March 2014
- Figure 45: Attitudes and opinions about health and medicine, by gender, April 2013-June 2014
- Figure 46: Attitudes and opinions about health and medicine, by age, April 2013-June 2014
- Figure 47: Attitudes and opinions about diet and health, by gender, April 2013-June 2014
- Figure 48: Attitudes and opinions about diet and health, by age, April 2013-June 2014
- Figure 49: Attitudes and opinions about diet and health, by household income, April 2013-June 2014
- Figure 50: Factors important to health management, by gender, November 2014
- Figure 51: Factors important to health management, by age, November 2014



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Figure 52: Factors important to health management, by household income, November 2014
- Figure 53: Factors important to health management, by education level, November 2014
- Figure 54: Factors important to health management, by race/Hispanic origin, November 2014

#### Professional care visits

- Figure 55: Visitation to healthcare provider past 12 months, November 2014
- Figure 56: Visitation to any healthcare provider, by take prescription drugs, November 2014
- Figure 57: Any primary care physician visitation, by gender, November 2014
- Figure 58: Any primary care physician visitation, by age, November 2014
- Figure 59: Any hospital visitation, by age, November 2014
- Figure 60: Any retail health visitation, by gender, November 2014
- Figure 61: Any retail health visitation, by age, November 2014
- Figure 62: Any urgent care visitation, by gender, November 2014
- Figure 63: Any urgent care visitation, by age, November 2014
- Figure 64: Professionals consulted with, by gender, April 2013-June 2014
- Figure 65: Professionals consulted with, by age, April 2013-June 2014
- Figure 66: Professionals consulted with, by race/Hispanic origin, April 2013-June 2014

# Selecting a healthcare provider

- Figure 67: Importance of factors when selecting a healthcare provider (top three), by gender, November 2014
- Figure 68: Importance of factors when selecting a healthcare provider (top three), by age, November 2014

# Correspondence analysis methodology

Figure 69: Visitation to healthcare provider, November 2014

# Prescription drugs and health conditions

- Figure 70: Healthcare coverage, by age, November 2014
- Figure 71: Healthcare coverage, by region, November 2014
- Figure 72: Healthcare coverage, by household income, November 2014
- Figure 73: Ailments suffered from, by age, April 2013-June 2014
- Figure 74: Ailments suffered from, by race/Hispanic origin, April 2013-June 2014
- Figure 75: Prescription drugs used past 12 month, by age/gender, April 2013-June 2014
- Figure 76: Attitudes toward prescription drugs, by household income, April 2013-June 2014

# Role technology plays

- Figure 77: Usage and interest in tools to manage health Would use in the future, by age, November 2014
- Figure 78: Types of health monitoring devices used, by household income, April 2013-June 2014

# Appendix - Trade Associations

American Medical Association (AMA)

American Pharmacists Association (APhA)

American Society of Consultant Pharmacists (ASCP)

Consumer Healthcare Products Association (CHPA)

The Kaiser Family Foundation



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100