

The Philips Center for Health and Well-being



Philips Index: America's Health & Well-being Report 2010



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Prepared by OneVoice Measurement January 5, 2010

A Word About the Philips Index: America's Health and Well-Being Report 2010 from the Center Director

Welcome, and on behalf of the Philips organization, thank you for taking the time to learn more about our report, the 'Philips Index: America's Health and Well-being 2010'. As we all enter an exciting new decade and strive to understand how the events of the past several years have impacted our thinking and our behavior, I hope it provides you with interesting insight into how Americans view their overall health and well-being. There are some fascinating findings -- for example, Americans are putting a significantly greater amount of importance on finding more balance and spending friends and family, and people's attitudes to health, fitness and weight vary widely among the population. Overall, the Philips Index reveals that Americans are struggling to remain optimistic as they balance concerns about personal finance, stress and the ability to spend quality time with friends and family.

This report was commissioned by The Philips Center for Health & Well-being. As a Center, we are dedicated to helping improve people's quality of life around the world. The Center is a knowledge-sharing forum that provides a focal point to raise the level of discussion on what matters most to people, communities, healthcare providers and thought leaders. The Center will bring together experts for dialogue and debate aimed at overcoming barriers and identifying possible solutions for meaningful change that can improve people's overall health and well-being.

We hope this report will provide some facts to start the discussion and ignites the kind of dialogue that is worthy of issues as vital to Americans -- and worldwide citizens -- as these are. We believe that in order to comprehend a society, and to be able to improve the health and well-being of populations, you need to be able to understand citizens, whether they are in their role as patients, voters, employees or consumers. This report is the first one of a series of Philips Indices on health and well-being across the world in which we hope to build a basis of understanding of how people, wherever they are in the world, feel about their health and well-being.

Yours sincerely,



Katy Hartley

Director of The Philips Center for Health & Well-being

www.philips-thecenter.org

I. Introduction

Philips is a pioneer in developing and bringing to market innovations that shape our healthcare, our lifestyle, and who we are as a society. Doing so means we need to understand the mega-trends in society. These include:

- What is the state of our health and well-being?
- What aspects of health and well-being are most important, and how satisfied are Americans with each of these aspects of our lives?
- What role does technology play in helping society maintain better health and well-being?
- How do Americans vary in terms of their attitudes and behaviors toward health and well-being?
- If we were to assign a particular index as an overall measure of health and well-being, what would it be and would it vary among different sub-groups of Americans?

This study seeks to address these questions and others. It builds from a similar study conducted in 2004, so that a five-year perspective is possible. However, that prior study had some methodological differences which are described in Appendix A. It is recommended that before looking at specific changes over the five-year period, one should be cognizant of the different approaches used in 2004 and in 2009.

It is the intention of Philips to continue to conduct this kind of trends research regarding how people in different countries approach health and well-being, and where we are similar and different across the globe. We believe that this understanding will enable us to continue to pioneer products, services and game-changing innovations that will help people, communities, health care systems, governments, and future generations address the critical issues surrounding how we live, how content we are, and our own roles in those dimensions of our lives.

II. Survey Methodology and Results

The Overall Approach

The Philips Index is based on a nationally representative sample of 1,503 adult Americans ages 18-65+.

The study was administered via telephone (both landlines and cell phones) by Braun Research, Incorporated. Fieldwork was conducted November 23 - December 7, 2009.

The sample has been weighted to represent U.S. proportions for age, gender, ethnicity and region. The standard margin of error for this total sample is +/- 3%.

Philips recognizes that people take different approaches to managing their overall health and well-being. Using a K-means cluster analysis, OneVoice reviewed multiple cluster solutions to create four subsegments of the population: Health Committed, Dr. Dependents, Well-Being Self-Governers and Health Traditionalists. Each of these segments is described more fully in this report. Full data for each segment can be found in Appendix C.

Finally, three Influential American audiences were identified from the overall respondent base – Influencers, Health Influencers and Technology Influencers. Influential Americans are a sub-sample of the 10-15% of the population who exercise influence and control the levers of change in society. Studying Influencers allows us to see where trends are heading and what we can expect average Americans to be feeling and doing in the future. A full breakdown of data for each Influencer group can be found in Appendix D.

**Please note that careful consideration should be taken when looking at comparisons between the 2009 and 2004 surveys. Please see Appendix A for full details.

Totals*	
Total	1,503
Gender	
Men	721
Women	782
Age	
18-24	13%
25-34	19%
35-44	22%
45-54	18%
55-64	12%
65+	17%
Race	
Black/African American	12%
White/Caucasian	72%
Latin American/Hispanic	12%
Asian/Pacific Islander	4%
Native American/American Indian	1%

*This sample is large enough to allow for sub-group analysis.

III. America's Health and Well-being

Current State of Health & Well-being

Feelings of health and well-being are strong. The vast majority of Americans (74%) rate their health and well-being as very good or good. However, despite this, there are some differences

between groups. Women are more likely to say that their health is somewhat good or not good at all compared to men. The same is true for those aged 55-64?

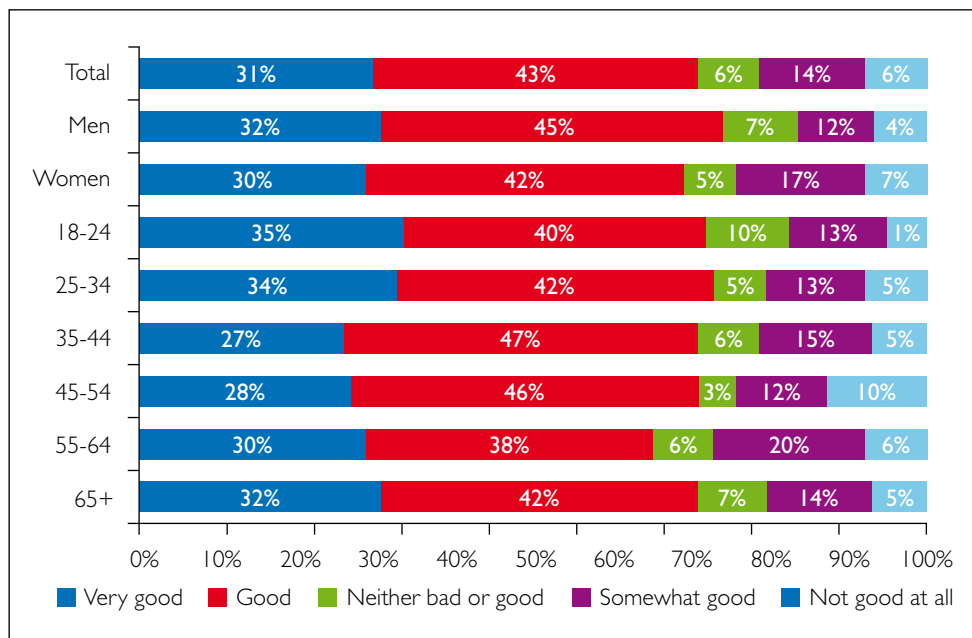


Figure 1: How could you rate your overall feeling of health and well-being

The Philips Index

While 74% of Americans say their overall feeling of health and well-being is good or very good, this aggregate metric does not necessarily tell the full story. What is missing is how good Americans feel about things that are important versus not as relevant. For example, if their family life is critical to their sense of health and well-being, while their satisfaction with it is quite low, their overall state of health and well-being would be lower than if one simply asks about this in general.

So, an analysis was conducted where overall satisfaction with various components of health and well-being were weighted by their relative stated importance. The results follow, and show that the weighted overall Index is in fact 55%, which is higher among men and lower among women. In addition, this approach shows that the area of greatest import, as demonstrated by many other parts of this research, relates to jobs and economic security. And, Americans are most content with their friends and family life. They feel generally good about themselves, from a physical health and

a well-being perspective. However, from an economic perspective, the country is on shaky ground.

Interestingly, Influencers tend to be more optimistic about all aspects of life and score higher on the overall Index than does the general population. In fact, Influencers feel significantly more positive about their jobs in this down economy than other groups.

This optimism may be a reflection of Influencers active involvement in the social, community and governmental arenas, and their propensity to consume more news and information than the average American.

Note that the 2004 study found an index of 62%, which was based on several questions about the state of Americans health, overall contentment and a positive belief in technology. While the two studies differ, they are consistent in reporting less than optimal levels of a sense of health and well-being. Moreover, the 2004 study also found high levels of concern regarding the economy and personal finances.

	Total	Men	Women	18-24	25-34	35-4	45-54	55-64	65+
Total Index Score	55%	58%	52%	52%	56%	55%	58%	57%	55%
Job Index	39%	45%	33%	35%	45%	48%	46%	40%	22%
Community Index	50%	51%	50%	44%	48%	49%	51%	55%	57%
Physical Health Index	58%	63%	54%	65%	59%	53%	58%	56%	61%
Well-Being Index	59%	60%	57%	54%	57%	53%	61%	62%	68%
Friends and Family Index	69%	70%	67%	64%	68%	68%	72%	73%	69%

Changes in Health & Well-being

Overall, Americans feel better or just as good as they did five years ago. Not surprisingly, the older the population gets, there are relatively fewer people who say things are

better from a health perspective than those who say things are worse. At around 35 years of age, people begin to have a lower opinion of the state of their health versus the recent past.

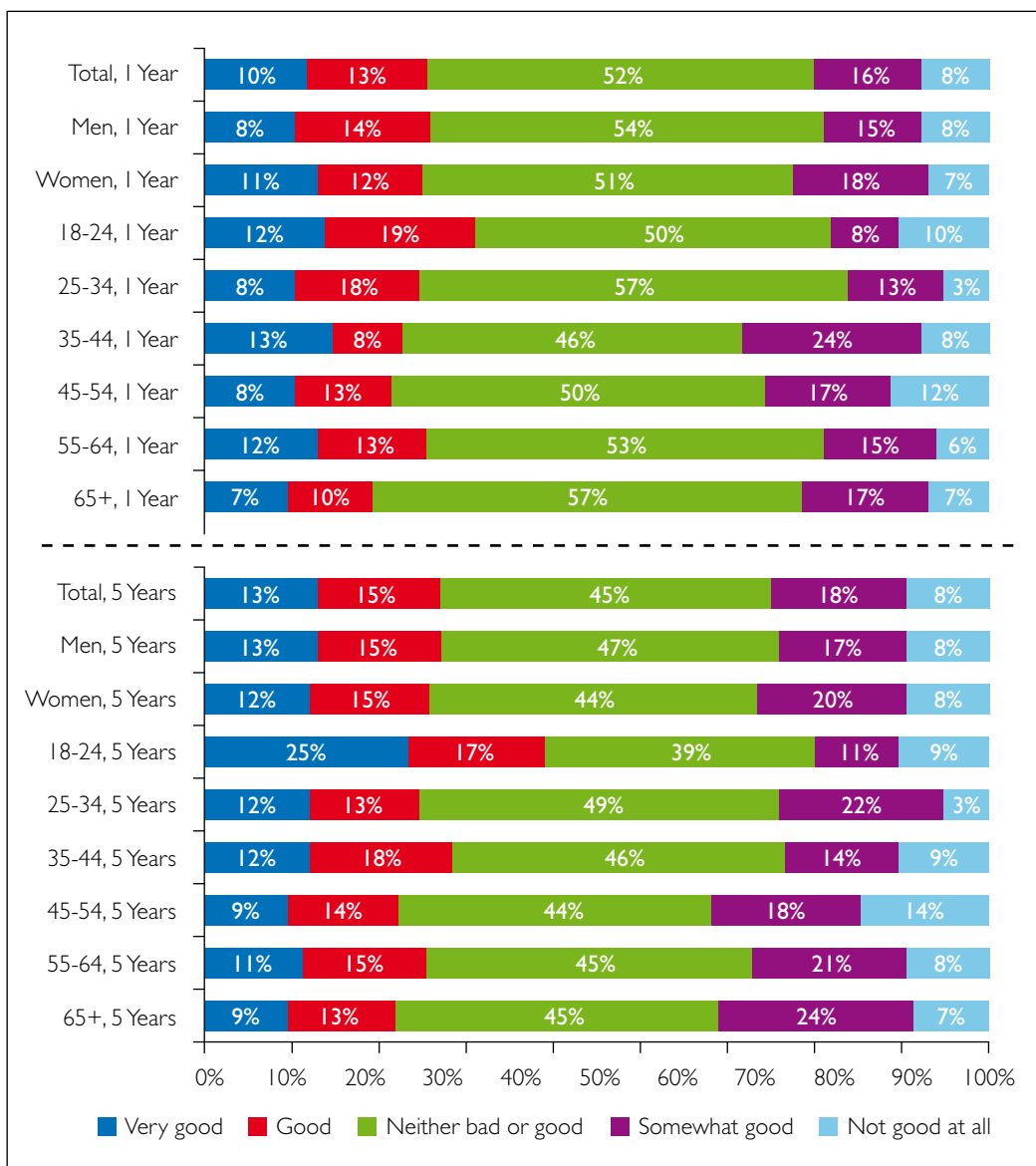


Figure 2: Would you say your feeling of health and well-being has gotten much worse, slightly worse, stayed the same, gotten a little better; or gotten much better in the last five years? How about the last years?

Effects of Various Life Components on Health & Well-being - Americans Can't Get No Satisfaction!

Gaps exist between the importance of the effect certain aspects of life have on feelings of health and well-being and the level of satisfaction Americans have with each. Financial matters, stress and overall physical

health account for the largest gaps between importance and satisfaction. The amount of free time Americans can spend with friends and family also accounts for a large gap.

	Importance	Satisfaction	GAP
Your job	68%	48%	-20%
How much you earn	83%	47%	-36%
How much you weigh	83%	59%	-24%
Your overall physical health	97%	70%	-27%
Your mental health	96%	83%	-13%
The community you live in	87%	75%	-12%
Your relationship with your family & friends	98%	86%	-12%
How much stress you have	85%	53%	-32%
The place of worship you attend, if any	74%	69%	-5%
How much you contribute to your community	81%	63%	-18%
The overall physical health of family members	96%	72%	-24%
Your relationship with your spouse or partner	79%	71%	-8%
Your relationship with your boss and coworkers	68%	53%	-15%
The cost of living	93%	39%	-54%
The amount of vacation time you have	74%	63%	-11%
The amount of free time you have to spend with friends and family	95%	69%	-26%
The amount of free time you can spend alone	84%	71%	-13%

Figure 3: For each of the following, how important are they in affecting your health and well-being? VERY IMPORTANT/IMPORTANT. For each of the following, how satisfied are you with this aspect of your life? COMPLETELY SATISFIED/SATISFIED.

The Role of Health & Well-being in Other Aspects of Life – Family and Friends Are Key Players in the Game of Life.

Overall feelings of health and well-being greatly affect many aspects of Americans' lives. From physical health, to relationships and free time spent, family and friends affect feelings of health and well-being the most. Stress, appetite

and relationship with a spouse or partner also greatly impact feelings of health and well-being. Some gender differences do exist. Women are more affected by weight than are men, while for men, job performance is more important.

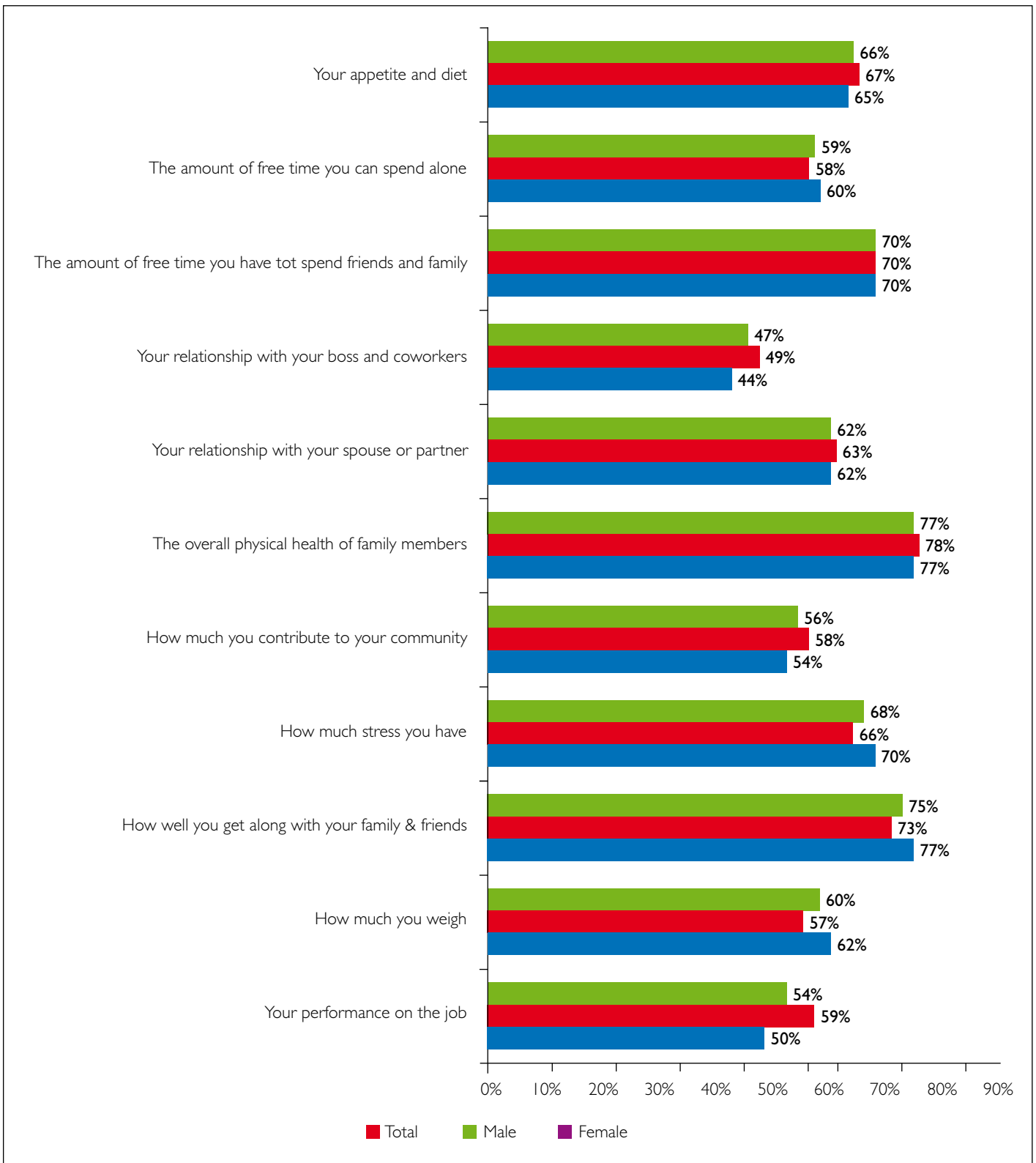


Figure 4: How much does your feeling of health and well-being affect the following aspects of your life?
GREATLY/TO SOME DEGREE

Personal Time Is the New Currency in America

Having good old-fashioned free time helps most Americans improve feelings of well-being. Spending time with friends and family, relaxing at home, getting outdoors and doing hobbies are the most popular ways to boost these feelings. Americans are less likely to practice more non-traditional activities such as getting acupuncture or doing yoga.

However, some differences do exist. Women are more likely to take vitamins or supplements or use herbal or homeopathic remedies to improve health and well-being, while men are more apt to spend time outside, doing hobbies or going to a health club. Women are more affected by weight than are men, while for men, job performance is more important.

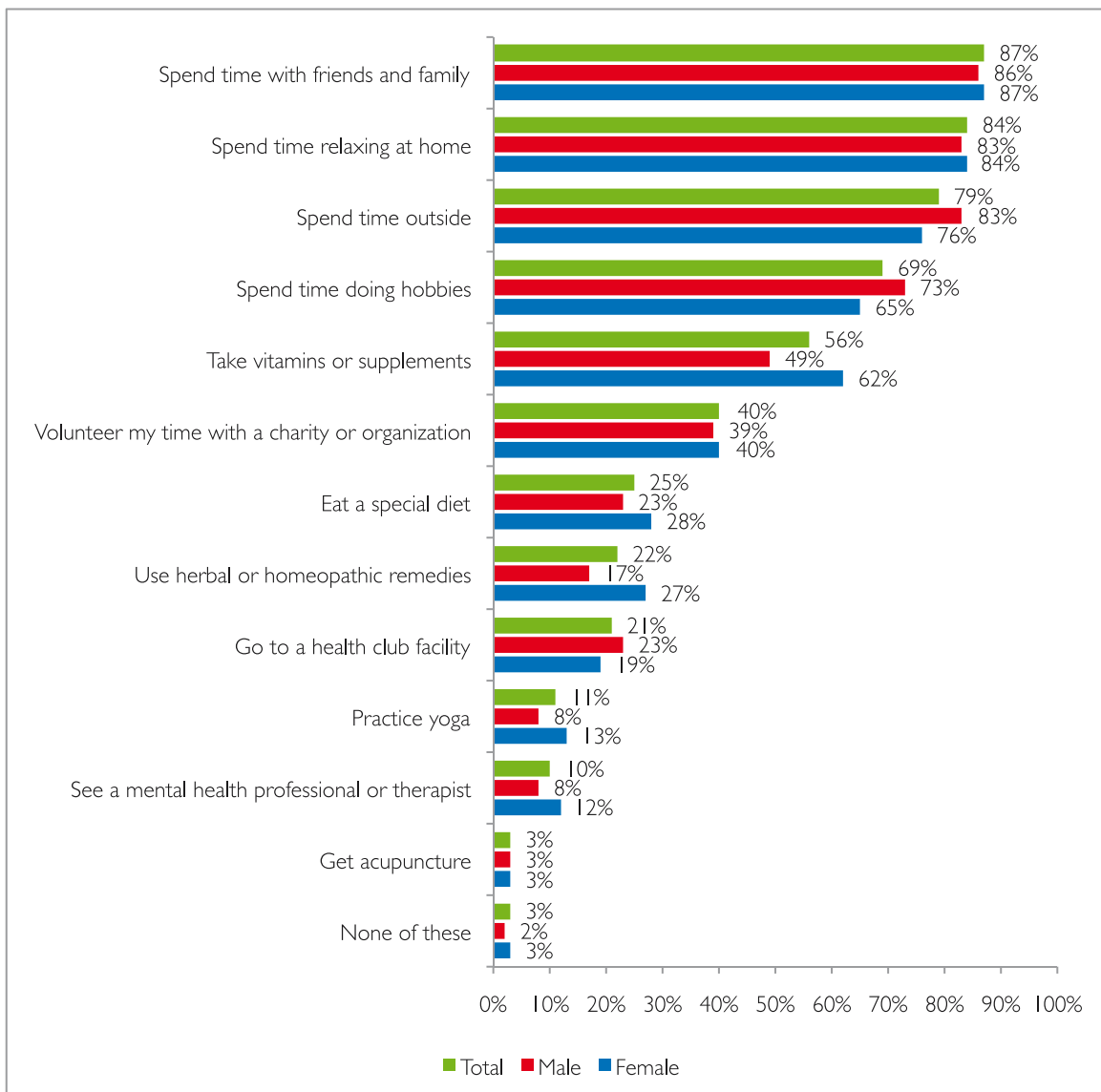


Figure 5: Which of the following do you do to help improve your feeling of well-being?

IV. How Americans Take Care of Their Health

Personal Physical Health Assessment – Americans Are Feeling Good!

Overall, Americans are feeling physically healthy. The majority (80%) rates their physical health as generally good, but with some minor problems, while a quarter of Americans say their physical health is excellent, with no significant problems. These findings are almost identical to the 2004 study, where 79% of Americans rated their health as excellent or generally good.

Some generational differences do exist. Unsurprisingly, 18-24 year olds are most likely to consider their physical health to be excellent and less likely to say they have any potentially serious or serious problems. However, as Americans move up in age to the next age group, these numbers more than double.

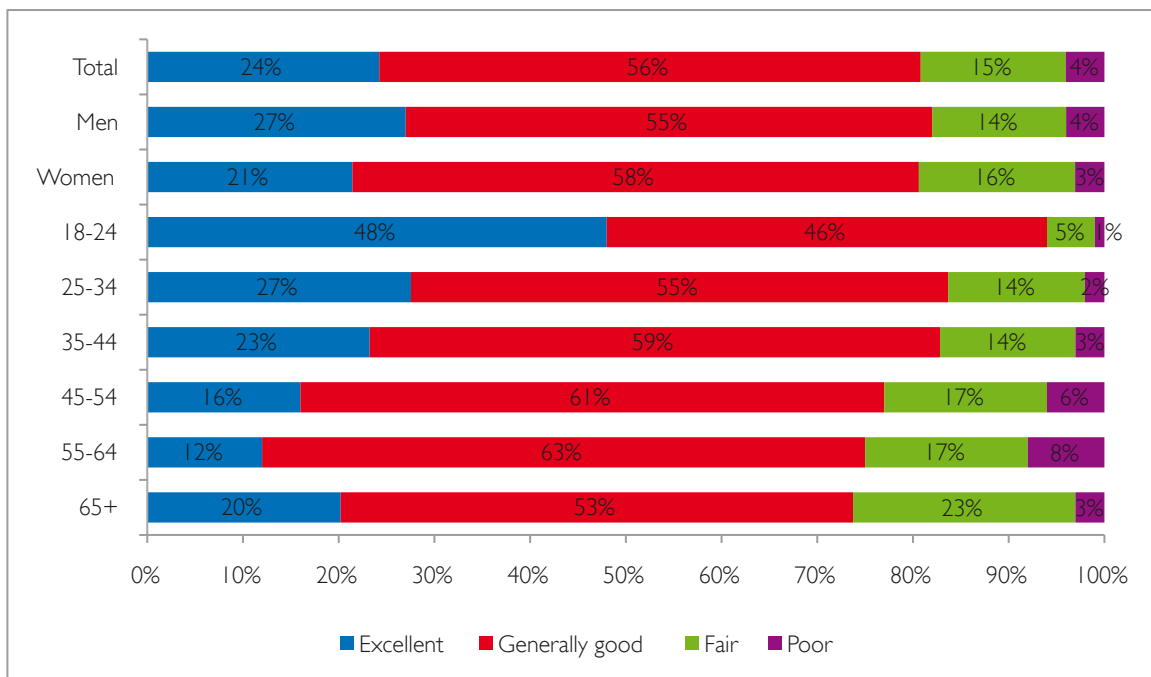


Figure 6: Overall, how would you rate the state of your physical health?

Personal Responsibility is on the Rise – Americans Are Owning up to Their Own Care

Most Americans feel personal responsibility for their physical health and believe that how they take care of themselves makes an important difference in their lives. Men are more likely to feel this way than are women. The same is true for those aged 18-24 and 35-44.

Compared to other groups, older Boomers (ages 55-64) are slightly less likely to feel that there is little they can do about their health. This finding of self-reliance and responsibility is consistent with the 2004 survey.

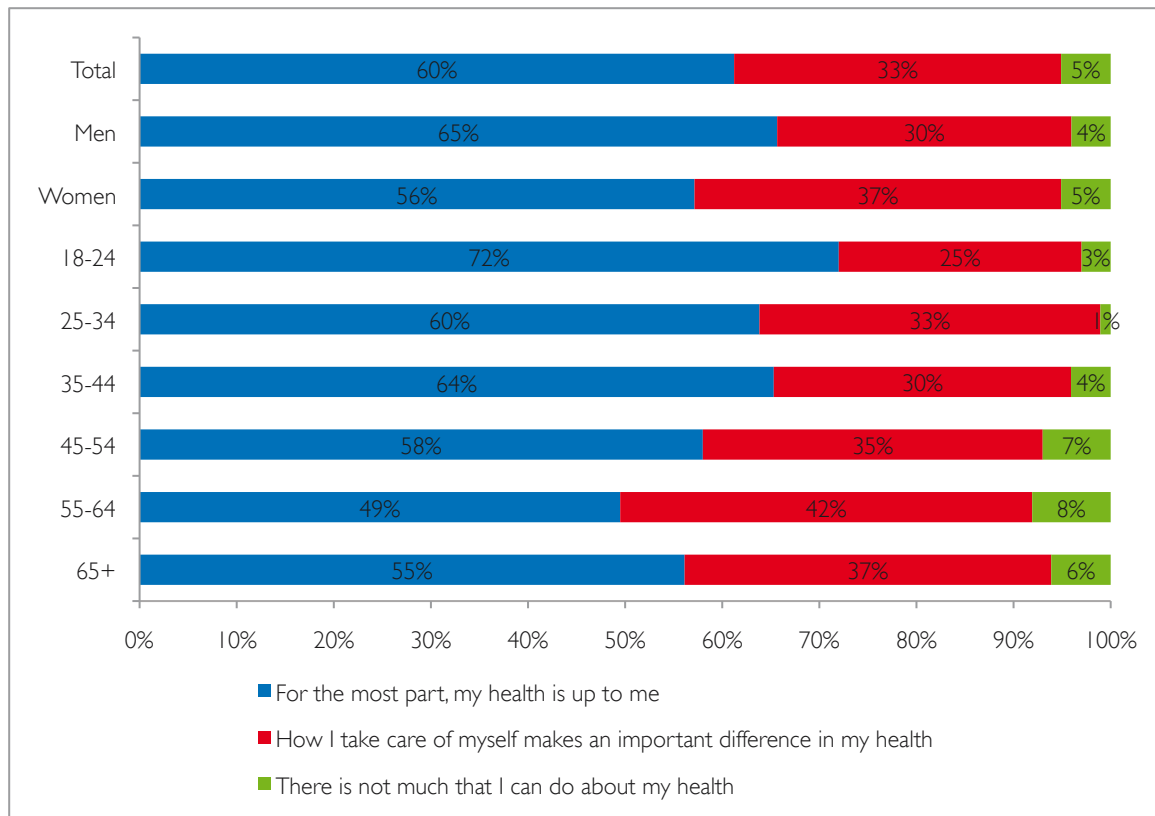


Figure 7: How much do you feel that the state of your health is up to you to control?

Americans Are Proactive About Their Health

Americans are generally quite proactive about managing their health, with seven in 10 getting regular check-ups with their doctor annually, a finding very consistent with the 2004 study. Women are more likely than men to see their doctor on an annual basis. Generally, as Americans grow older more and more visit their doctors regularly. However, there is a

stark drop in doctor visits for those aged 25-34 from those aged 18-24. As was true in 2004, doctor visits increase when specific problems exist. Six in 10 Americans see their doctors at least a couple times a year when they have a specific problem, illness or condition. These numbers increase as Americans age and illness is more likely to strike.

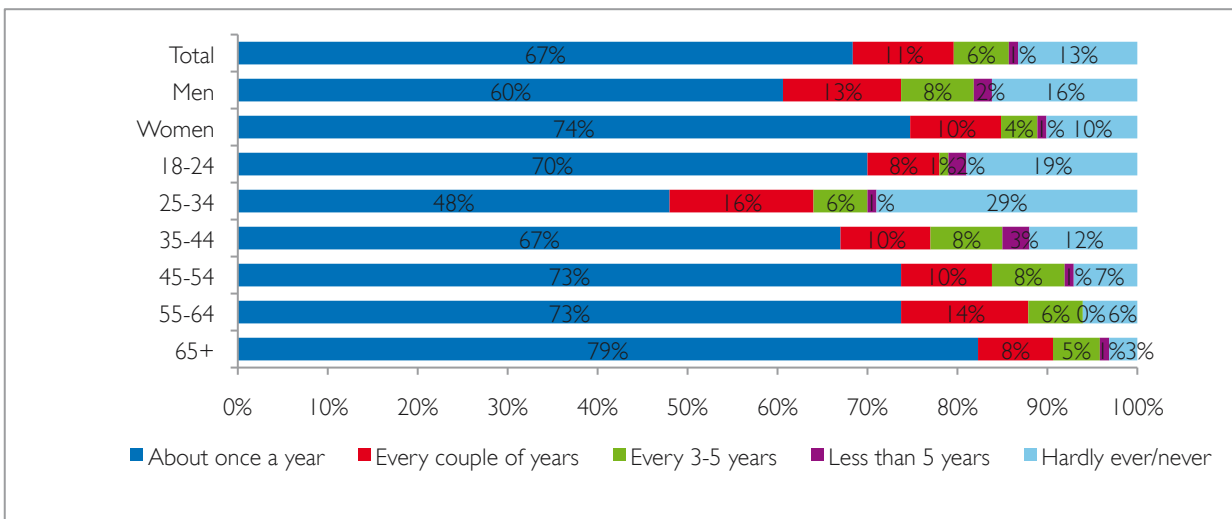


Figure 8: How often do you go to the doctor for a general check-up?

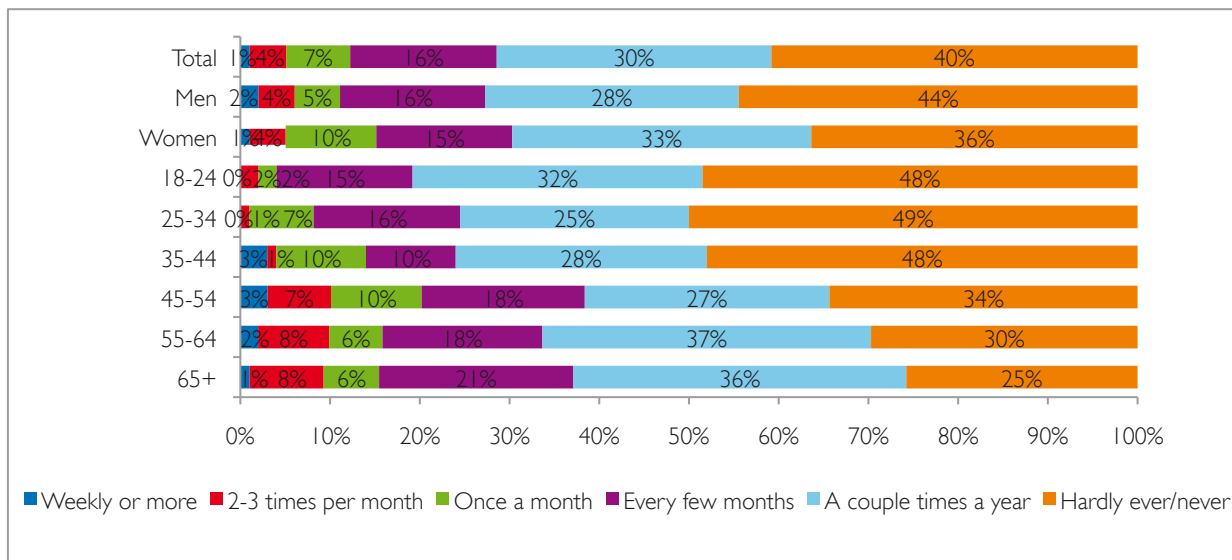


Figure 9: How often do you go to a Doctor for a specific problem, illness or condition?

Oral Health is also Important – Americans are Visiting Their Dentists Often

Like going to the doctor, most Americans (64%) see their dentist at least once a year, as is consistent with the 2004 study. Those aged 45-64

are more likely than other age groups to see their dentists at least every six months. There's very little difference between men and women.

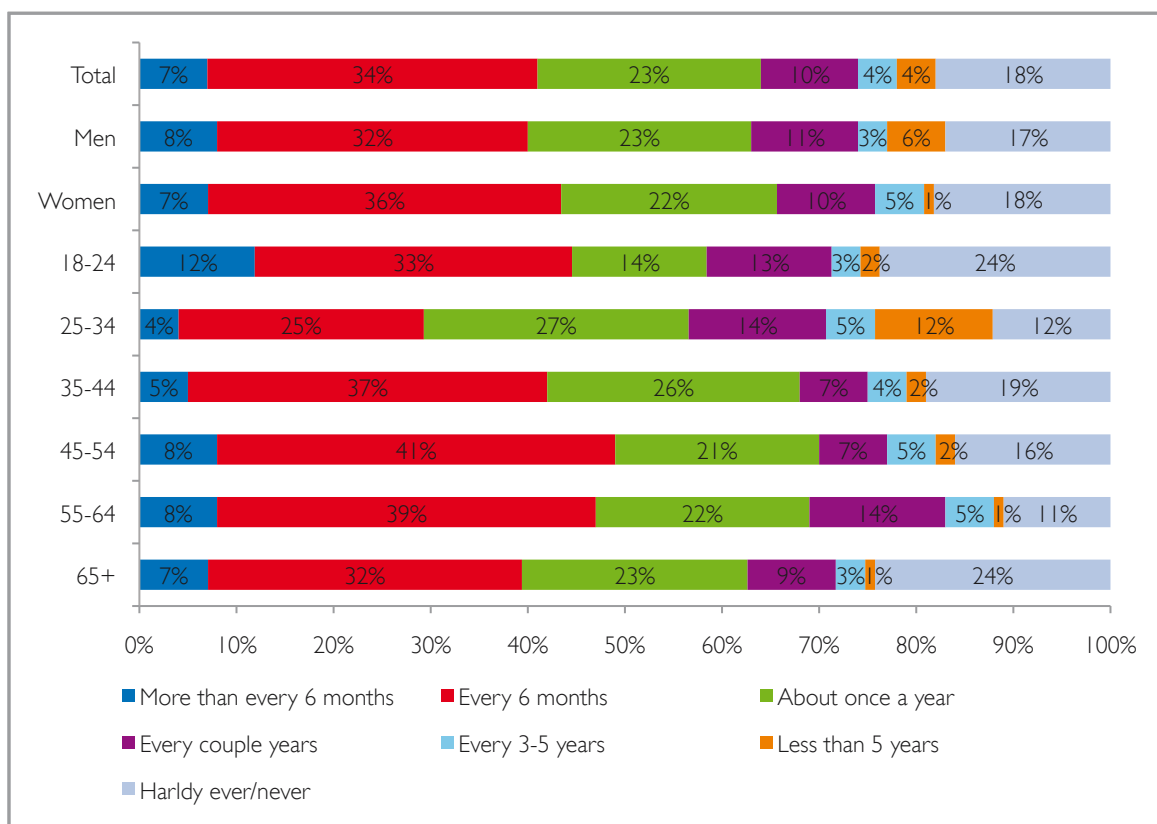


Figure 10: How often do you go to the dentist for a cleaning or a general check-up?

Americans Reliance on Mood-Altering Medication May be Declining

About one in 10 Americans is on medication for anxiety, stress or mood stabilization. Women are slightly more likely than men to take these types of medications. A trend can also be seen in age – as Americans get older, they are more likely to take medications for the mind than are younger generations.

However, in general, fewer Americans seem to be relying on medications that treat stress, anxiety and mood. The number of Americans on these types of medications has dropped significantly compared to the 2004 study (27% in 2004 vs. 13% in 2009).

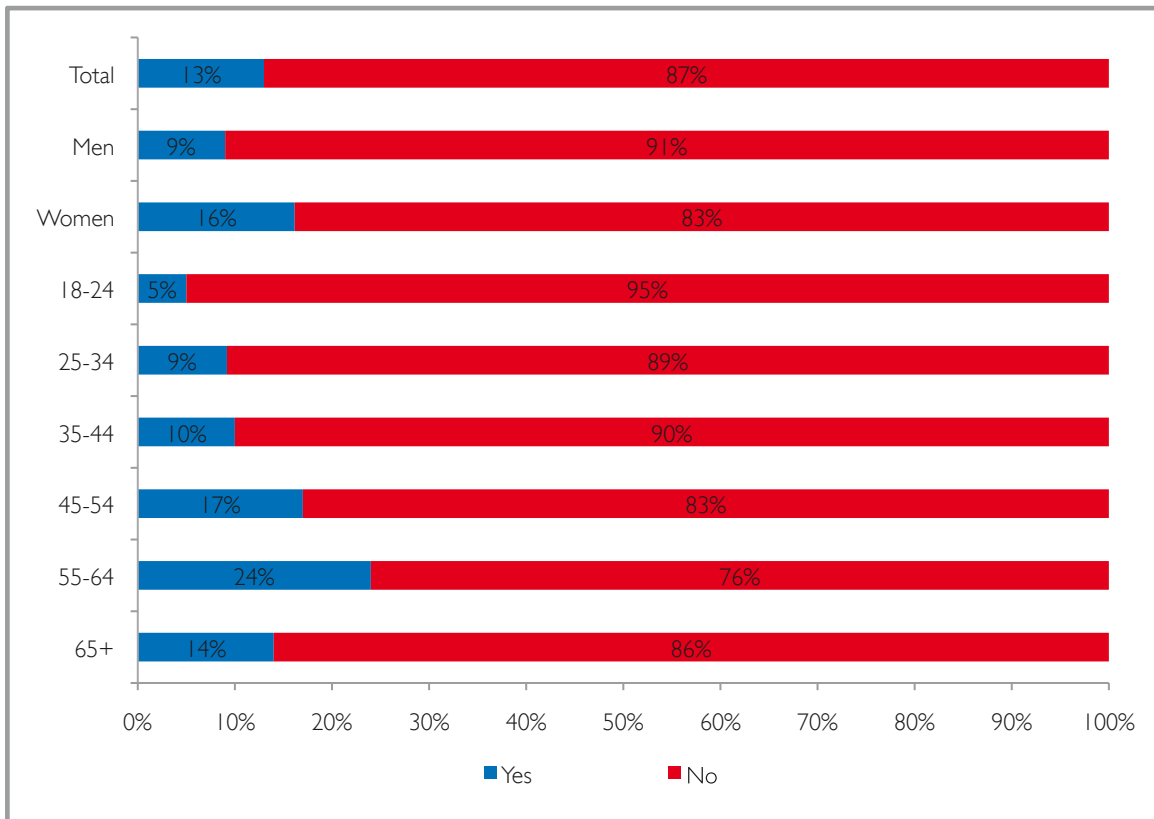


Figure 11: Are you on any medication for anxiety, stress or mood stabilization?

Doctors Sought Out for Health and Medical Information First Before Any Other Source

Doctors are the go-to source when Americans are concerned about being sick, and Americans are twice as likely to turn to doctors as they are to use any other source. Doctors also ranked at the top of the list in 2004. Half (48%) of Americans chose doctors as their first source of information in 2004, while 53% did so in 2009. The same is true for any source of information – eight in 10 (79%) Americans selected doctors as their overall source in 2004 versus the same amount (80%) in 2009.

Internet searches and family and friends also rate highly as first sources of information.

The '04 study showed that family members and friends, following the doctor, as a first stop for health information rated higher than did Internet searches. The reverse is true in 2009.

Interestingly, Americans may not be relying on television as a source of health information as much as they did in the past. Television as a source has dropped five percentage points from the previous study.

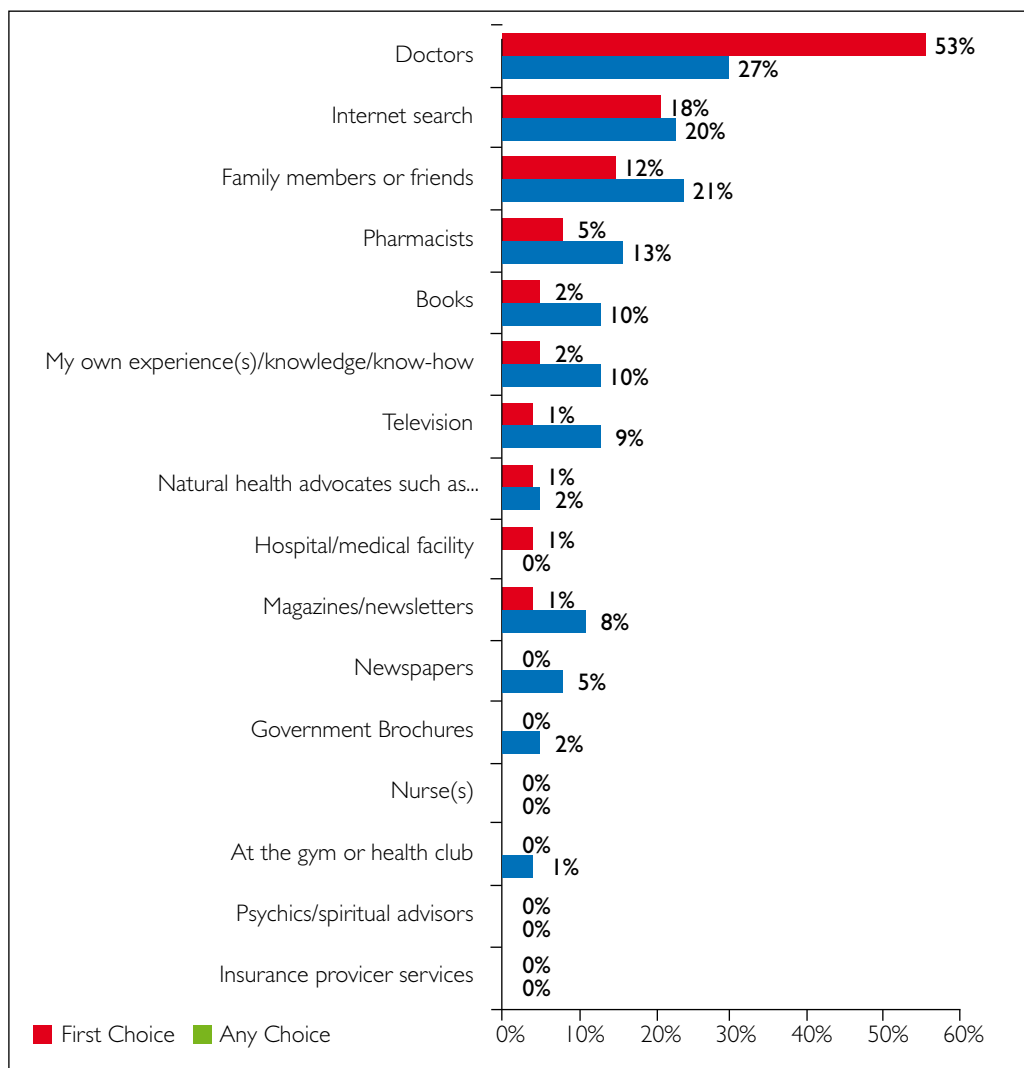


Figure 12: When you are concerned about being sick, where do you usually get your medical or health information FIRST? Where else do you get your medical or health information?

Profiles of American Health – Americans Find Doctors to be Trustworthy Sources

Americans trust their doctors. The majority of Americans feel comfortable talking to their doctors about medical issues. In fact, eight in 10 always get the medical tests they are supposed to get, while 71% do whatever their doctors tell them to do – this

is significantly higher than the 59% reported in 2004. Also, six in 10 (59%) Americans expect that medical technology will allow them to live to a ripe old age. In general, women seem to be more trusting of doctors and more likely to follow advice than are men.

Which of the following statements are true about you?	Total	Men	Women	Health Influencers
I am comfortable talking to my doctor about medical issues	90%	87%	92%	93%
I believe you can improve your appearance without cosmetic surgery	80%	80%	80%	81%
I always go for the medical tests I'm supposed to get	76%	73%	78%	83%
I think that surgery should always be avoided if possible	76%	73%	80%	73%
I like to stay on top of health-related news and information	76%	70%	81%	86%
I do whatever the Doctor tells me	71%	69%	73%	69%
I don't exercise as much as I think I should	66%	63%	69%	66%
If I don't like what a Doctor says, I go for a second opinion	64%	63%	65%	75%
I go to the Doctor regularly	61%	54%	67%	74%
I expect medical technology to keep me healthy to a ripe old age	59%	57%	61%	59%
I wish I could email my Doctor when I have questions	59%	55%	62%	64%
I eat healthier than most people	54%	53%	55%	77%
I am as physically fit as I can be for my age	51%	52%	51%	48%
I would communicate with my Doctor more often if I didn't have to make a trip	49%	48%	50%	46%
I believe most health problems get better if you give them time	52%	52%	51%	48%
I believe in non-traditional forms of medicine such as acupuncture and herbal treatments	42%	41%	43%	57%
I am eager to try new gadgets or devices aimed at improving my health and well-being	42%	41%	42%	40%
I avoid going to the Doctor as much as possible	45%	49%	41%	46%
I'm nervous/skeptical about going to the hospital	41%	39%	43%	44%
I don't think I go to the Doctor as much as I should	36%	38%	34%	27%
I'm in better shape now than ever before	29%	32%	26%	28%
I don't always take the medicine I'm prescribed	29%	34%	23%	24%
I wouldn't mind having a little cosmetic surgery to improve my appearance	22%	15%	29%	27%
I would much prefer to do my own medical tests at home	22%	29%	16%	25%
If I don't like what a Doctor says, I ignore it	20%	24%	16%	18%

Figure 11: Are you on any medication for anxiety, stress or mood stabilization?
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The Different Health Personalities: A Segmentation Analysis

OneVoice's analysis of attitudes related to managing one's health and well-being classified people into four general groups:

- Health Committed – Proactive about their health and willing to try new approaches.
- Dr. Dependents – Passive about health management. They are remorsefully unfit, but still follow doctor's orders.
- Well-being Self-Governors – Avoids doctors and hospitals, prefers self health management.
- Health Traditionalists - Does what the doctor says, but only to a certain degree. They are generally healthy, but not necessarily physically fit.

Summary of Key Differences by Group	Health Committed (Segment 4) 25%	Dr. Dependents (Segment 2) 31%	Well-being Self-Governors (Segment 3) 22%	Health Traditionalists (Segment 1) 22%
Good Overall Health & Well-being?	High	Low	Low	High
Fit?	High	Low	Low	Moderate
Follows Dr Orders?	High	High	Low	High
Use of Technology?	High	Moderate	Moderate	Low
Seeks Health Info?	High	High	Moderate	Moderate
Seeks Alternatives to Rx?	High	Low	High	Low
Demographics				
Age Skews	18-34 – 41%	35-64 – 60%	25-34 – 54%	18-24 – 19%
65+ – 23%				
Gender Skews	None	Female	None	Male

Detailed Attitudes by Group

	Health Committed (Segment 4) 25%	Dr. Dependents (Segment 2) 31%	Well-being Self-Governors (Segment 3) 22%	Health Traditionalists (Segment 1) 22%
Health and Well-Being				
How would you rate your overall health and well-being? (Very good)	42%	25%	27%	49%
Fitness				
I am as physically fit as I can be for my age	91%	21%	38%	58%
I'm in better shape now than ever before	66%	7%	17%	39%
I don't exercise as much as I think I should	52%	87%	71%	55%
Physician Directed Health Management				
I do whatever the Doctor tells me	90%	78%	46%	71%
I always go for the medical tests I'm supposed to get	89%	92%	48%	80%
I don't think I go to the Doctor as much as I should	33%	22%	73%	25%
I avoid going to the Doctor as much as possible	41%	20%	86%	30%
I would much prefer to do my own medical tests at home	25%	11%	38%	12%
If I don't like what a Doctor says, I ignore it	22%	7%	42%	8%
I'm nervous/skeptical about going to the hospital	41%	25%	73%	24%
Health and Technology				
I wish I could email my Doctor when I have questions	71%	75%	74%	24%
I would communicate with my Doctor more often if I didn't have to make a trip	63%	52%	65%	16%
I expect medical technology to keep me healthy to a ripe old age	83%	66%	52%	38%
I am eager to try new gadgets or devices aimed at improving my health and well-being	82%	38%	43%	14%

Detailed Attitudes by Group Continued

	Health Committed (Segment 4) 25%	Dr. Dependents (Segment 2) 31%	Well-being Self-Governors (Segment 3) 22%	Health Traditionalists (Segment 1) 22%
Health Engagement				
I go to the Doctor regularly	75%	88%	26%	53%
I like to stay on top of health-related news and information	91%	84%	68%	56%
If I don't like what a Doctor says, I go for a second opinion	78%	68%	65%	44%
Treatment Affinity				
I believe in non-traditional forms of medicine such as acupuncture and herbal treatments	58%	41%	50%	20%
I don't always take the medicine I'm prescribed	42%	13%	42%	19%
I believe most health problems get better if you give them time	72%	47%	64%	31%

Health Committeds:

Health Committeds are generally healthy and have an interest in keeping themselves that way. This segment tends to skew younger, with four in 10 (41%) between the ages of 18-34. Fitness is very important to the Health Committeds – the majority (91%) claim to be as physically fit as they can be for their age, while two-thirds (66%) feel they are in better shape now than ever before. This segment is also very doctor-friendly – three-quarters (75%) go to the doctor regularly. Also, nine in ten (90%) do whatever the doctor tells them to do and always go for the medical tests they are supposed to get (88%). However, if this segment doesn't like what the doctor says, they will go for a second opinion (78%). Seven in 10 (72%) also believe that most health problems get better if you give them time. Health Committeds may also be technology and information-committed as well. Eight in 10 (83%) expect medical technology to keep them healthy into old age and they are eager to try new gadgets that are aimed at improving their health and well-being (82%). The majority (91%) of this segment also likes to stay on top of health-related and news and information.

Dr. Dependents:

Dr. Dependents are predominately middle-aged with six in 10 (60%) falling between the ages of 35-64. This group also tends to skew female. Just a quarter of this segment rates their health and well-being very good. Fitness is not a priority for Dr. Dependents – nine in 10 (87%) believe they don't exercise as much as they should and just one-fifth (21%) claim that they are as physically fit as they can be for their age. And while they may not be considered the healthiest segment, they do go to the doctor regularly (88%), tend to follow their doctors' orders (78%) and get the medical tests they are supposed to get (92%). Very few (7%) say that if they don't like what a doctor says, they ignore it. Although they are generally passive about their own health, Dr. Dependents do like to stay on top of health-related news and information (84%).

Well-being Self Governors:

About half (54%) of this segment is aged 25-34. Well-being Self Governors like to take control of their own health, although just a quarter (27%) rates their overall health and well-being as very good. Of all segments, Well-being Self-Governors are least likely to visit the doctor on a regular basis – just 26% do so, and three-quarters (73%) are nervous or skeptical about going to the hospital. They are also the least likely to follow doctors orders (46%) and get the medical tests they are advised to get (48%). In fact, many would prefer to do their own medical tests at home (38%), and if they don't like what the doctor says, four in 10 (42%) will ignore it. Although they may not have much faith in doctors or visit them often, three-quarters of Well-being Self Governors (74%) wish that they could email their doctors when they have questions, and many feel they would communicate with their doctors more often if they didn't have to make the trip to the office (65%).

Health Traditionalists:

Health traditionalists are typically male, and in general, they rate their overall health and well-being as very good (50%). Although, fitness may not be a priority for them, six in 10 (58%) do feel that they are as physically fit as they can be for their age and many feel that they are in better shape now than ever before (30%). However, despite this, 55% feel they don't exercise as much as they should. While many tend to do what their doctors tell them to do (71%) and get the medical tests they are supposed to get (80%), just half (53%) go to the doctor on a regular basis. In fact, three in 10 (30%) avoid going to the doctor as much as possible. Health Traditionalists may also be technology traditionalists. Of all the segments, health traditionalists are the least likely to believe the medical technology will keep them healthy to a ripe old age (38%) and very few are eager to try new gadgets or devices aimed at improving their health and well-being (14%).

Life Expectancy – Americans Are Optimistic About Living Long Into the Future

Americans plan to live longer than their parents or at least about the same amount of time. Women are more likely than men to feel this way, while those aged 25-34 and 55-64 are more likely than other age groups to feel this. In general, the majority of

Americans (59%) feel they will live to be at least 81 years old – nearly identical to the 2004 study. One-third of those aged 65 and over expect to live to be at least 91 or older. This is higher than any other age group.

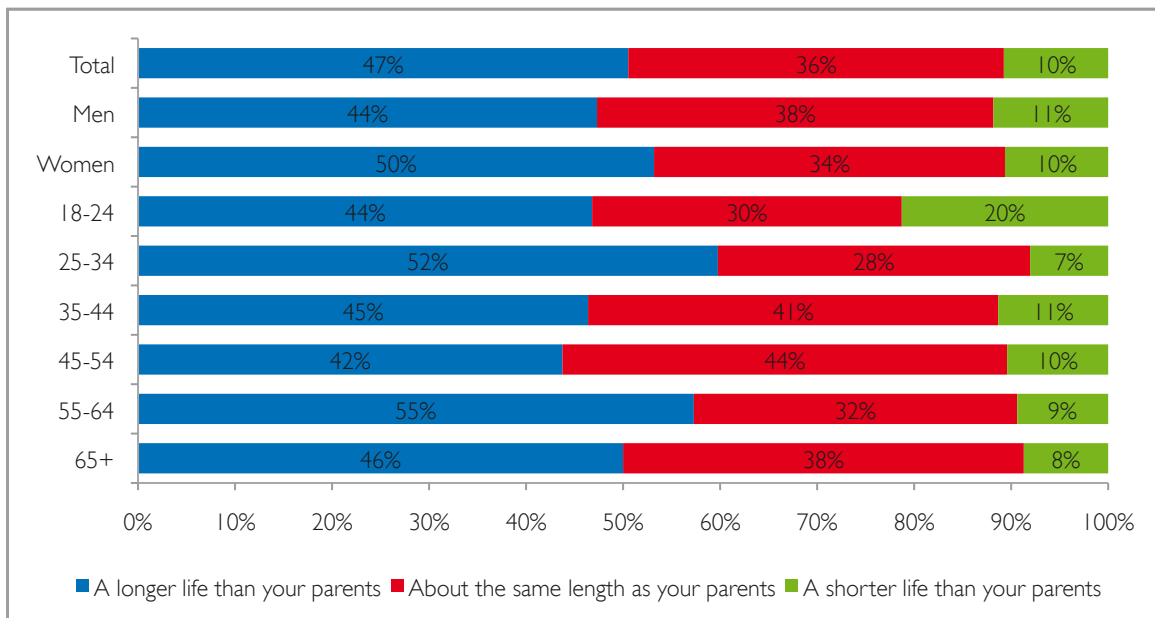


Figure 14: Do you expect to live...?

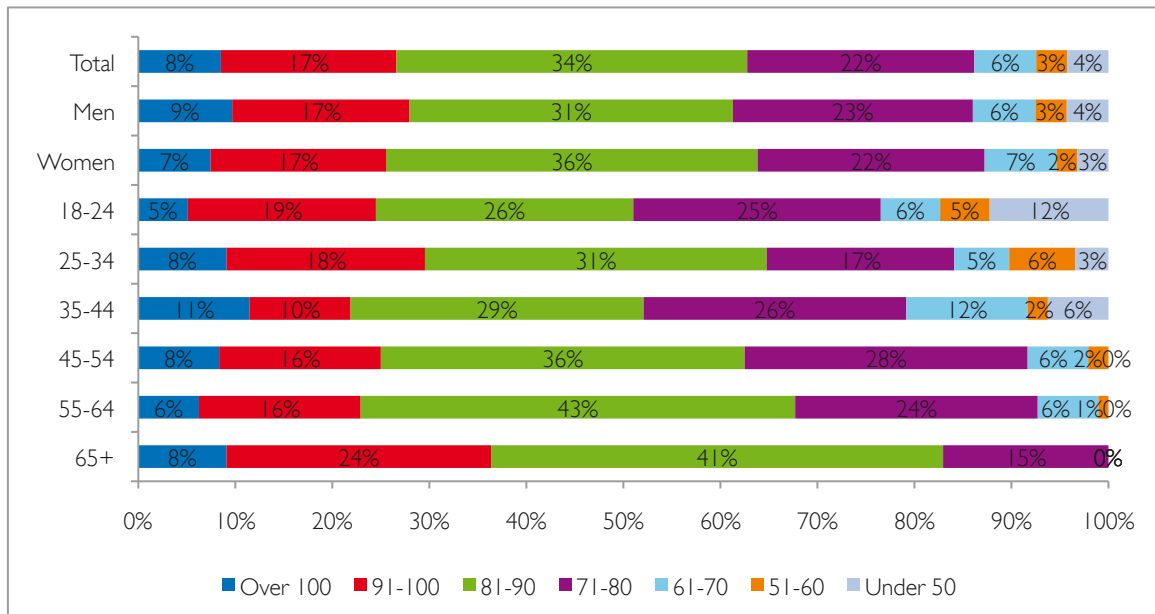


Figure 15: How old do you expect to live to be?

Americans Are Not Afraid to Know the Tough Answers

If faced with a terminal disease, the vast majority of Americans would want to know about it. In fact, in the future if there were a medical device that could tell Americans if and/or when they may contract a serious

medical condition or disease they would want to know about it. However, slightly fewer Americans in the age range of 55-64 would want to know this information.

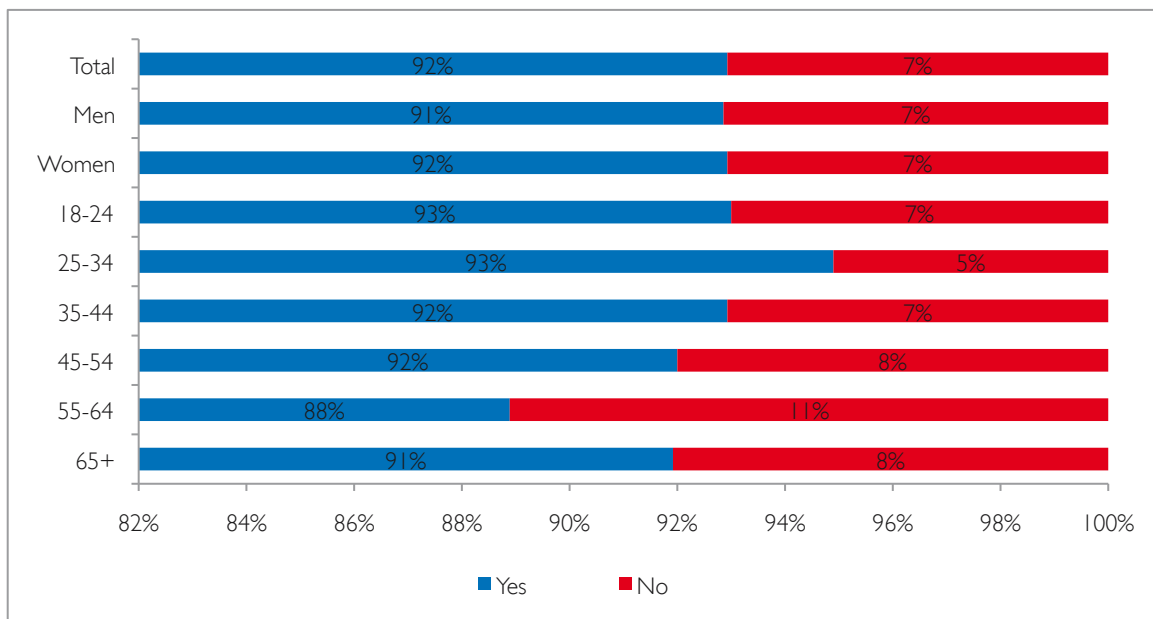


Figure 16: If you had a terminal disease, would you want to know?

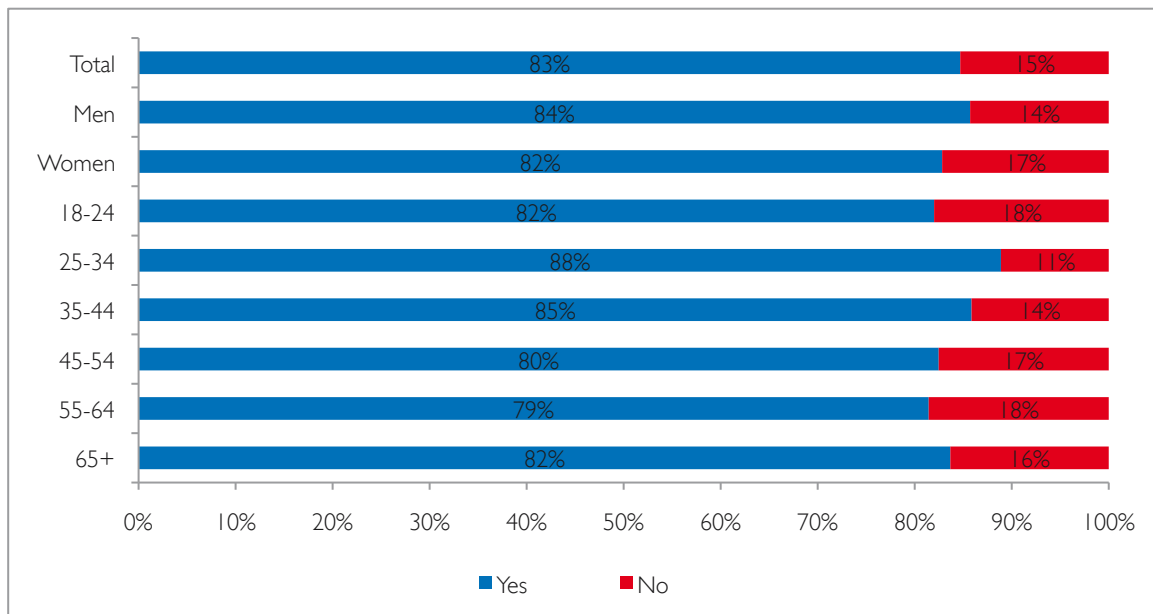


Figure 17: In the future, medical devices (or medical technology) may be able to tell you if and/or when you may contract a serious medical condition or disease. Would you want to know this information in advance?

V. The Roles of Weight, Diet, Sleep and Stress

Body Image in America – Americans Don't Believe They Are as Overweight as They May Seem

Four in 10 Americans consider themselves to be overweight, but generally only by a few pounds – this is down significantly from the 2004 study where 54% considered themselves overweight. Women are more likely to feel this way than are men.

As Americans age, they are most likely to feel that they are in need of losing weight. However, not all Americans want to lose weight – three in 10 are not interested. Of those that do, most want to lose 30 pounds or less.

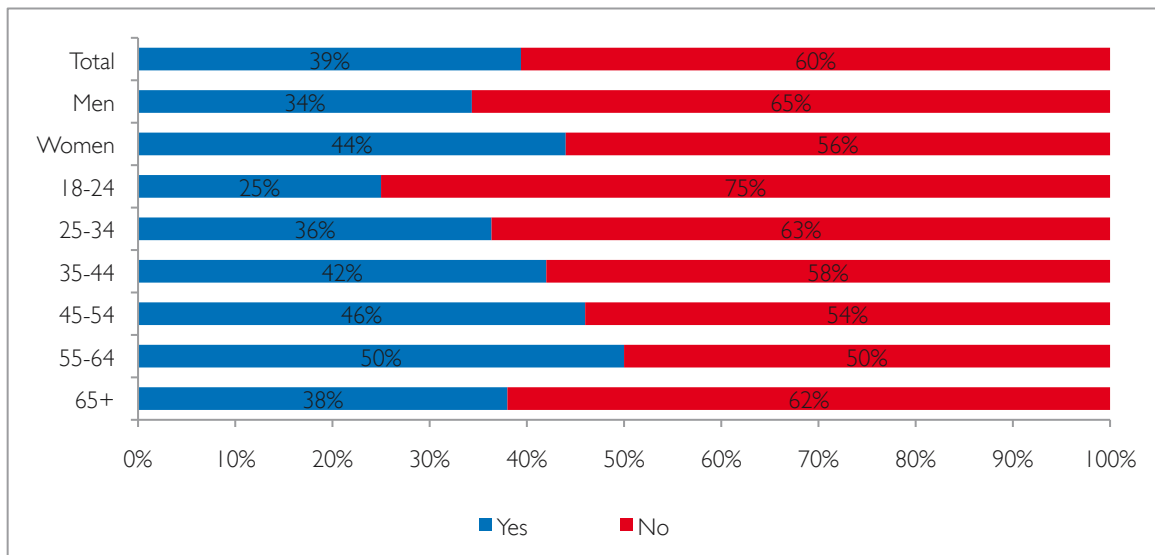


Figure 18: Do you consider yourself to be overweight?

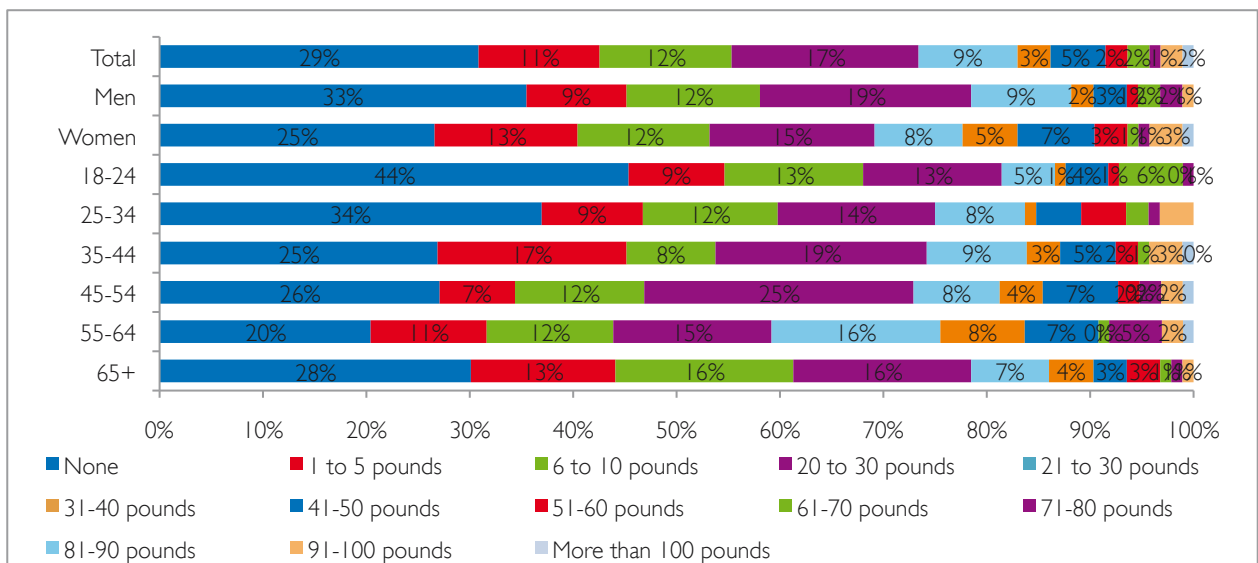


Figure 19: How much weight are you trying to or would you like to lose?

Most Americans Would Make Changes to Their Diet and Exercise Regimes to Aid in Weight Loss

Three-quarters of Americans would increase their exercise routines in an effort to lose weight – this is up 14 percentage points from the 2004 study. Changing eating habits such as lessening consumption of calories, fat, sweets, salt and fast

food are also popular choices to help aid weight loss. In general, women are more likely than men to make these changes. Half of Americans say that they would try an exercise device to help them if they wanted to lose weight.

If you wanted to lose weight, which of the following would you do?	Total	Men	Women
Increase exercise	76%	76%	75%
Eat lower calories	64%	60%	68%
Eat lower fat	62%	57%	67%
Stop/cut down eating sweets	61%	54%	67%
Stop/cut down eating fast food	57%	55%	60%
Stop/cut down eating salty snacks	54%	48%	60%
An exercise device	50%	50%	50%
Eat lower carbohydrates (Atkins, Zone, South Beach)	49%	45%	53%
Consume less alcohol	28%	29%	26%
Go on Weight Watchers or other diet program	22%	18%	26%
Use diet aids or supplements	18%	17%	18%
Consider surgery	7%	4%	10%
Not interested in losing weight	7%	7%	7%
Other	1%	1%	0%
Don't Know/Refused (VOL.)	1%	2%	0%
Nothing works for me	0%	0%	0%

The Impact of Sleep Deprivation – Stress Is Keeping America Awake at Night

Nearly four in 10 Americans are sleep deprived, with women feeling most of the impact. Worry and stress are top reasons

Americans are not getting enough sleep at night. Busy lives during the day are also keeping them awake at night.

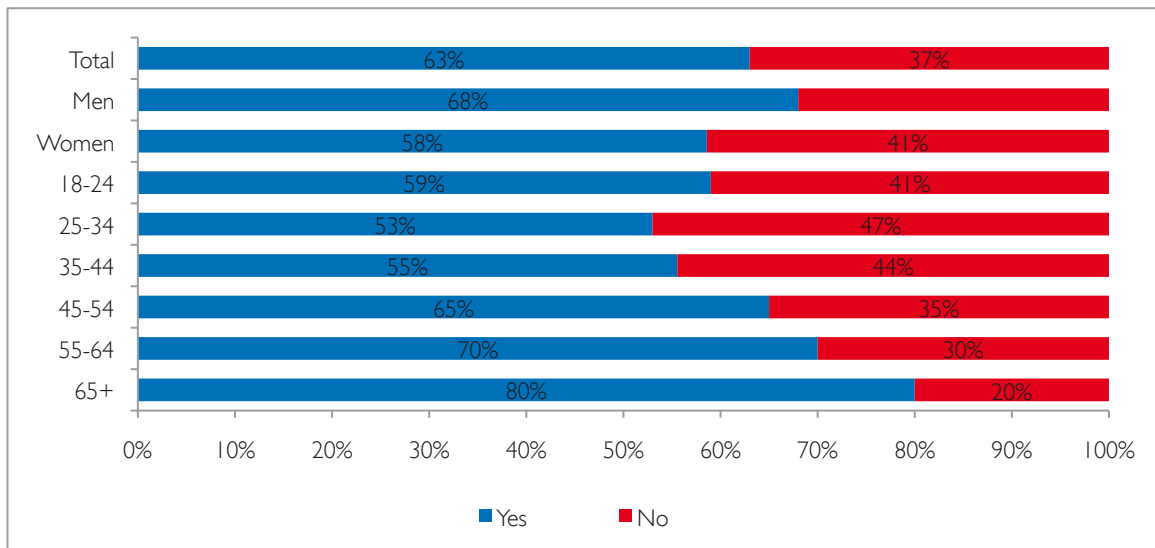


Figure 21: Do you get enough sleep at night?

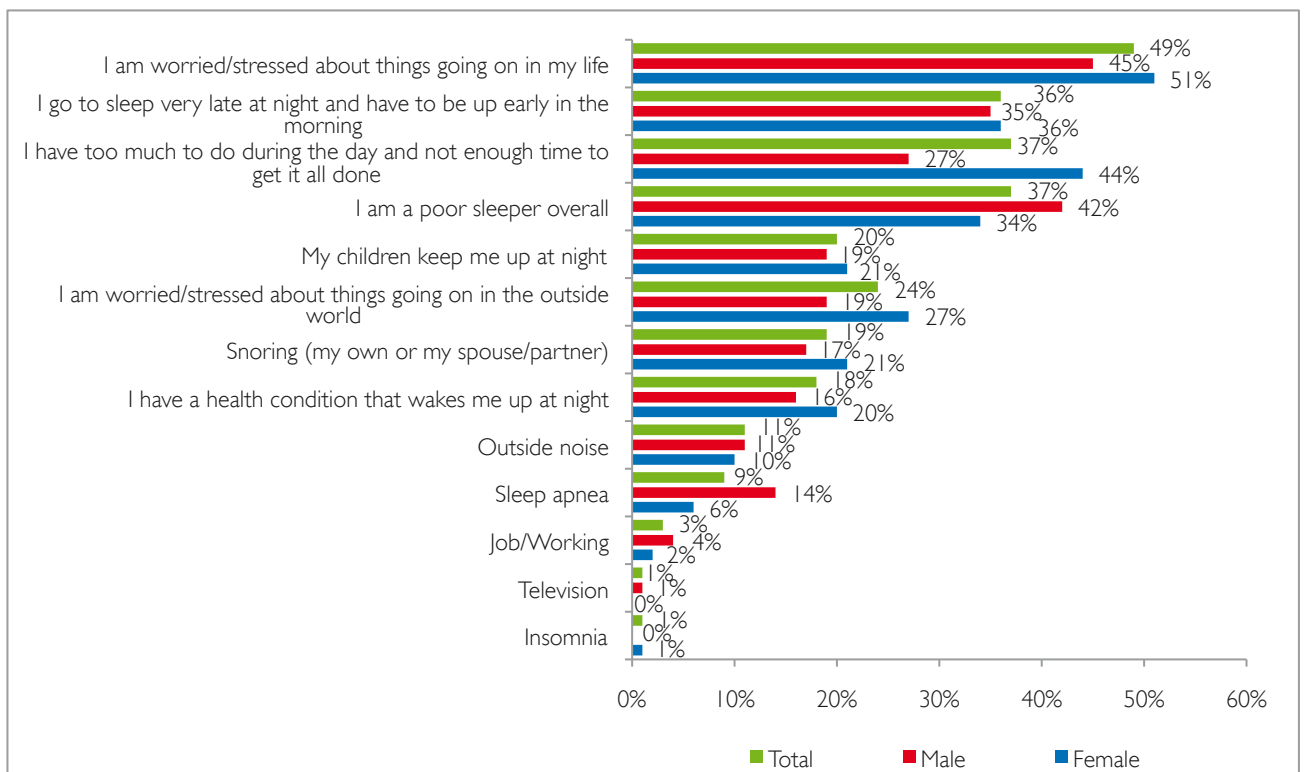


Figure 22: What are some reasons you don't get enough sleep at night?

Lack of Sleep Affects both Physical and Mental Health

Sleep deprivation can have an impact on health and well-being. Six in 10 Americans feel that their physical health is affected, while half feel lack of sleep affects their mental health and home life.

Women are more likely to feel the effects when it comes to physical health, home life, job performance and community involvement, while men tend to be more mentally and emotionally taxed.

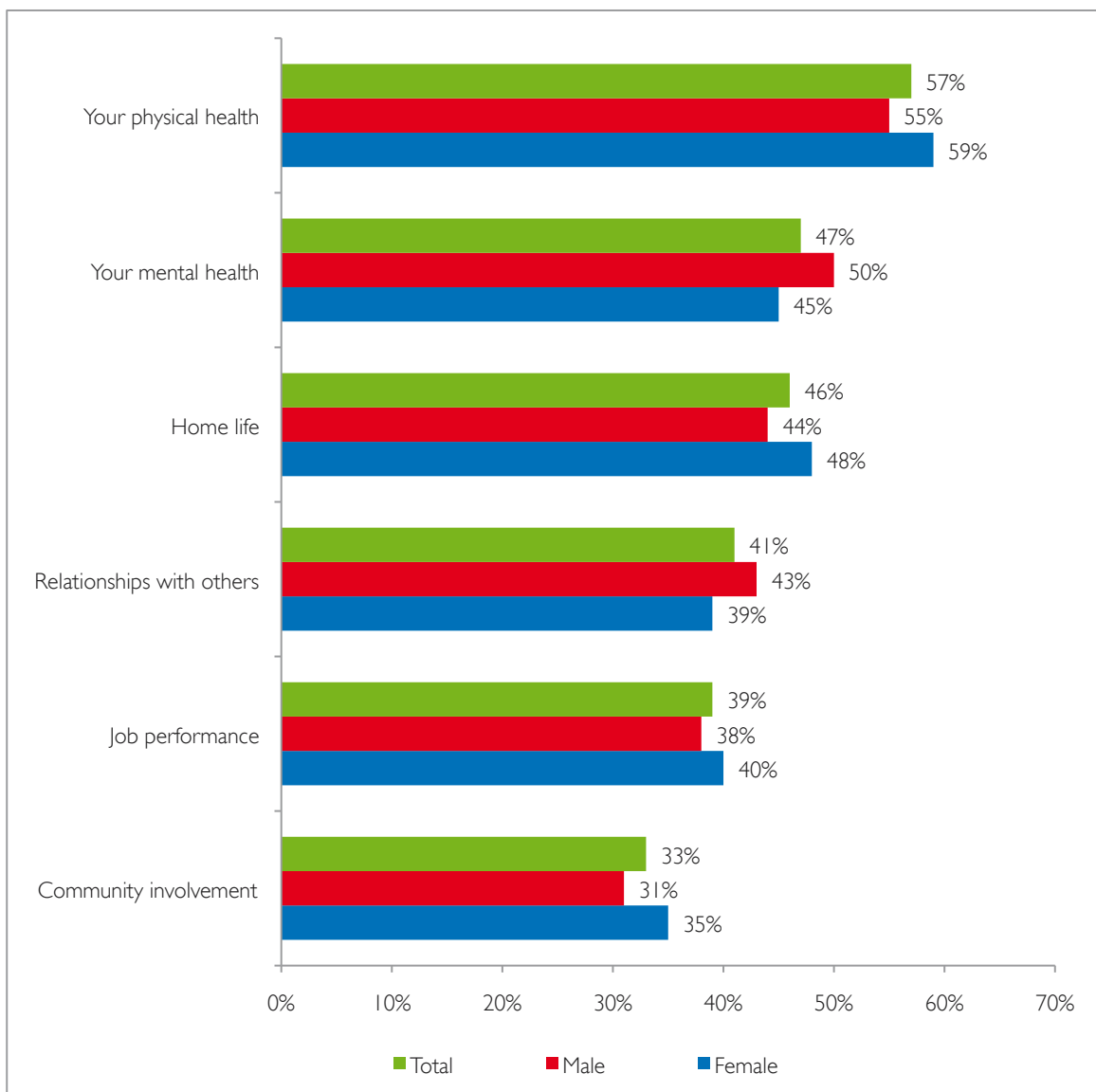


Figure 23: How much does a lack of enough sleep affect each of the following?

Stress Is Commonplace in America

The majority of Americans experience some level of stress in their lives. Women are more likely to say they have a lot of stress than are men. The same is true for groups aged 18-24 and 35-44. Pressures of college or getting a first job may be contributing factors to the stress levels of

Americans aged 18-24, while those 35-44 may be dealing with the strains of raising a family, running a household and juggling a career. The majority of those aged 65 and older claim to have little or no stress, which may be due to recent retirements and additional financial stability.

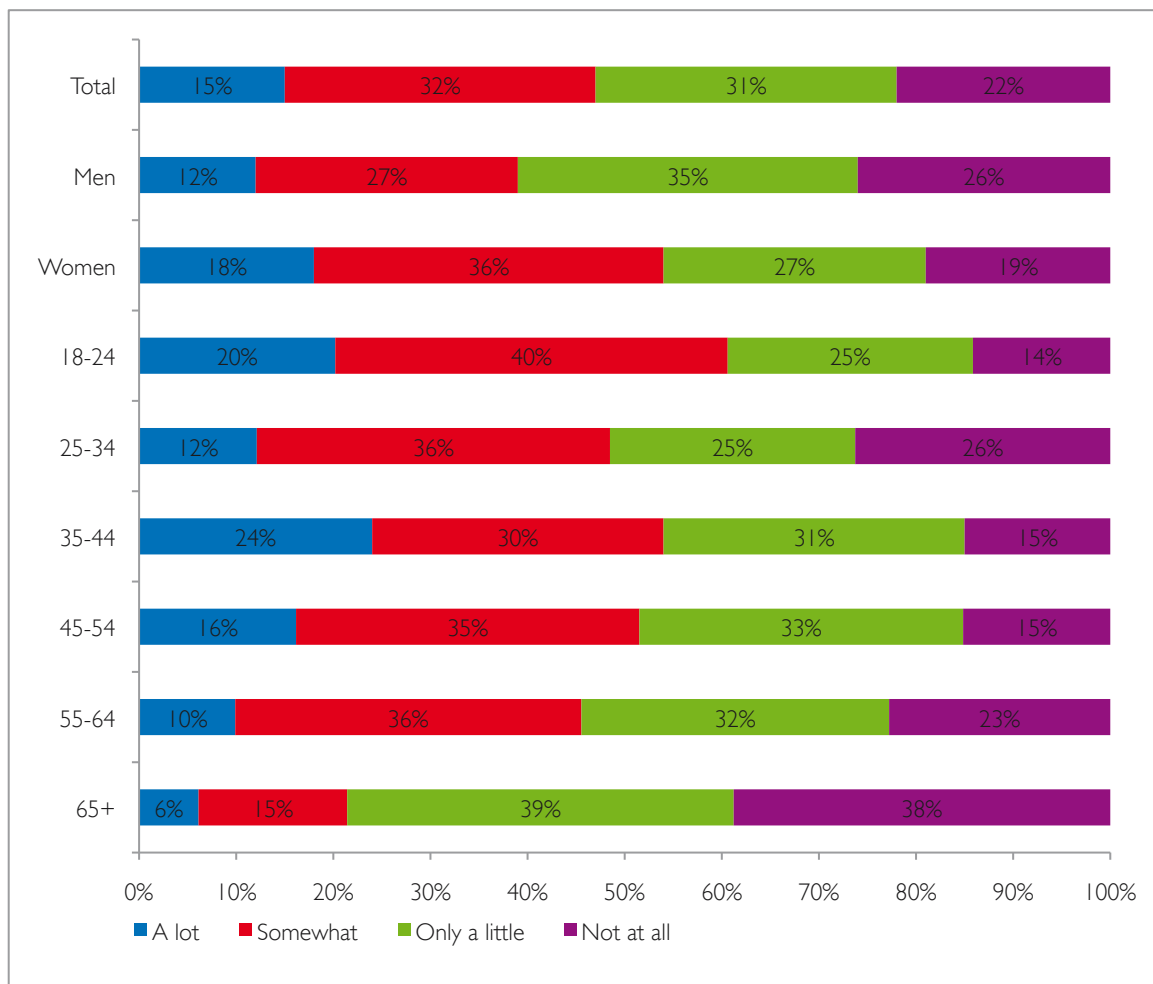


Figure 24: How stressed do you consider yourself to be?

Financial Concerns Are Key Stressors in Americans' Lives

The economy and other financial concerns such as having enough money to pay bills, save for the future and healthcare costs are some of the reasons Americans are feeling stress. Concerns over the economy are up significantly from

the 2004 study where just 40% of Americans expressed concern. Women appear to be more affected by finances than are men. In general, women seem to feel more stressed as a whole compared to their male counterparts.

To what degree do each of the following contribute to stress you might feel? A LOT/SOMEWHAT	Total	Men	Women
The economy	74%	70%	77%
Having enough money to save for the future	70%	64%	75%
Having enough money to pay your bills	66%	61%	70%
Healthcare costs	66%	64%	68%
Politics/government-related issues	50%	52%	48%
Wars in Iraq and Afghanistan	52%	44%	59%
Getting enough sleep	49%	42%	55%
World news and events	49%	44%	53%
Loss of job	44%	45%	44%
Job	44%	45%	43%
Ability to retire	45%	44%	46%
Crime that might affect you	42%	36%	48%
Your kids	41%	36%	45%
Your home/apartment	37%	30%	43%
Spouse	32%	33%	31%
Boss	28%	28%	28%
Where you live	28%	26%	30%
Coworkers	28%	26%	29%
Commuting to/from work	27%	28%	26%
The telephone	26%	24%	27%
Other communications technology	23%	21%	25%

VI. Where Americans Live

Americans Want to Feel Safe in Their Communities

Americans rank safety and crime rate as well as access to healthcare facilities and hospitals at the top of the list when it comes to the importance of having each in their communities.

Women are more likely to feel these items are important than are men. Local government and schools, while strong, are not as important.

When you think of the community you would most like to live in, how important are each of the following? VERY IMPORTANT/IMPORTANT	Total	Men	Women
Safety and crime rate	94%	90%	97%
Local hospitals	90%	87%	93%
Access to healthcare facilities	89%	86%	92%
Availability of shopping and grocery stores	85%	85%	86%
Pollution and smog	86%	82%	89%
Quality of roads	85%	84%	87%
Availability of employment	80%	80%	80%
Parks and recreation facilities	79%	78%	80%
Local schools	78%	76%	80%
Local government	77%	76%	78%
Garbage pick-up	77%	73%	80%
Access to arts and culture	69%	64%	73%
Distance to your place of employment	66%	65%	66%
Cable service	62%	61%	62%

VII. The Role of Technology in America

Technology in 2009 – An American Outlook

Americans believe technology will improve life in the future. Eight in 10 Americans feel that technological advances will fundamentally change our homes over the next ten years, while just as many feel that medical technology advances will allow us to live longer in the future. In general,

men seem to have slightly stronger feelings towards technology than do women. With the proliferation of social networking sites, women are more concerned about privacy than are men. Just a quarter of Americans feel that social networks have made their lives easier.

Thinking about the role of technology in your life, how much do you agree or disagree with the following statements: COMPLETELY AGREE/SOMEWHAT AGREE	Total	Men	Women	Technology Influencers
Technological advancements will fundamentally change our homes in the next 10 years	79%	82%	77%	87%
Medical technology will allow me to live longer	76%	79%	74%	84%
I am responsible for figuring out the best technologies that can improve my sense of health and well-being	74%	75%	74%	84%
Lighting can have a significant effect on my sense of health and well-being	72%	71%	72%	80%
My lifestyle improves as new technologies are created	65%	66%	65%	74%
The Internet has made my life better	64%	63%	65%	77%
I get really excited when new technologies come out	53%	56%	50%	60%
I am concerned that the proliferation of things such as Facebook and MySpace will reduce my privacy	52%	48%	55%	51%
Technology has made life more stressful	50%	49%	51%	54%
By the time I reach the age where I expect to have serious health issues, medical technology will have advanced to the point where those issues won't affect me	51%	52%	49%	50%
When I have a concern about a health issue, I usually check the Internet first	45%	45%	46%	57%
I know how to use all of the features on my Smartphone	43%	48%	39%	53%
I wish there was less technology in my life	42%	42%	43%	37%
Social media such as Twitter, Facebook and MySpace have made my life better	26%	26%	26%	31%

Technology Is Changing Lives for the Better

The majority of Americans today feel that technology has made their lives better. These findings are consistent with the 2004 study. Ease in communication and access to information, in particular, have made had an impact on Americans' lives. Advances in health and medicine have also had an impact.

Eight in 10 Americans feel that medical treatments and diagnosis have also benefited from technology. Men are more likely to feel this way than are women. Americans feel that technology has the least impact on personal relationships and human relations.

Changes in technology have affected almost every aspect of life. For each area listed, do you think technology has made things better, made things worse or made no difference at all? MAKES LIFE BETTER	Total	Men	Women
Communication	84%	85%	83%
Information	82%	83%	82%
Medical treatments	79%	81%	77%
Education	77%	73%	80%
Medical diagnosis	77%	77%	76%
Entertainment	73%	74%	72%
Travel	69%	70%	68%
Staying organized	69%	71%	67%
Saving time	68%	70%	66%
Health maintenance and prevention	67%	68%	66%
Managing money	64%	64%	64%
Workplace efficiency	63%	65%	61%
Shopping	62%	63%	61%
Pursuing dreams and opportunities	61%	64%	59%
Security	61%	60%	61%
Working at home	60%	62%	59%
Saving money	54%	54%	54%
Human relations	53%	52%	55%
Personal relationships	48%	48%	48%

Americans Are Keen on Technology That Can Affect Health and Well-Being

Three-quarters (74%) of Americans feel they are responsible for figuring out which technologies will help improve their health and well-being. In fact, improving stress may be a key driver in the desire for new technologies moving forward.

Six in 10 Americans say they would be likely to use lighting to improve their mood and reduce stress levels. Surprisingly, women seem to be more in favor of technology that can help improve their health and well-being than are men.

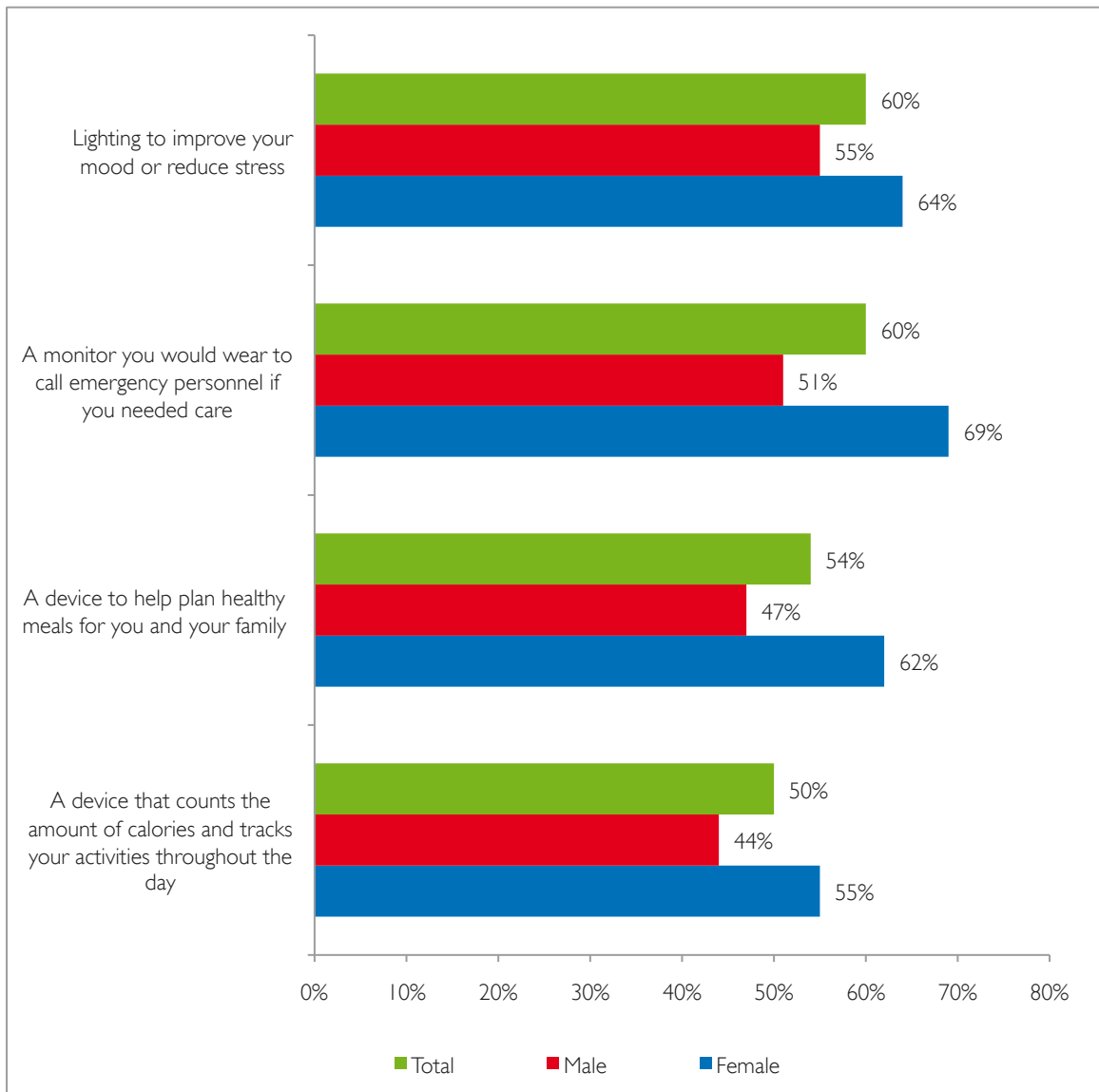


Figure 29: The following are various things that you could use at home to affect your health and well-being. How likely would you be to use the following? VERY LIKELY/SOMEWHAT LIKELY

Technology Is No Stranger to Most Americans

In general, most Americans find that technology is easy to use or has the right balance of advanced features and basic functions. While the same was true in the 2004 study, at the time far less Americans felt technology was easy to use than they do today (13% in 2004 vs. 46% in 2009).

Younger generations are more likely than older ones to feel that technology is easy to use. However, despite ease of use, the majority of Americans either always or frequently read the manuals that come with new technology products. This finding is consistent with 2004 results.

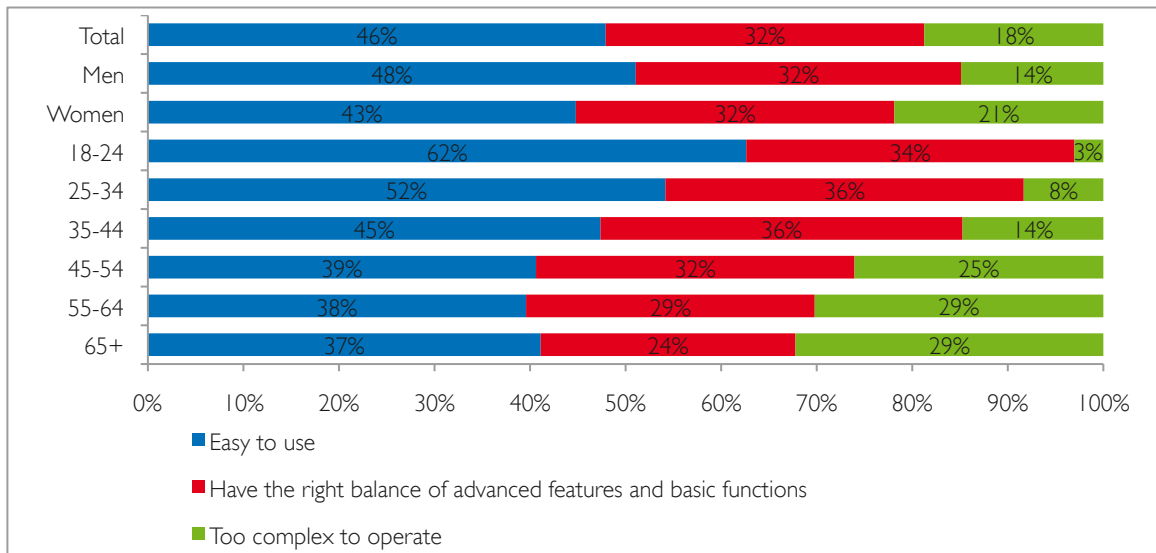


Figure 30: In general, technology products are:

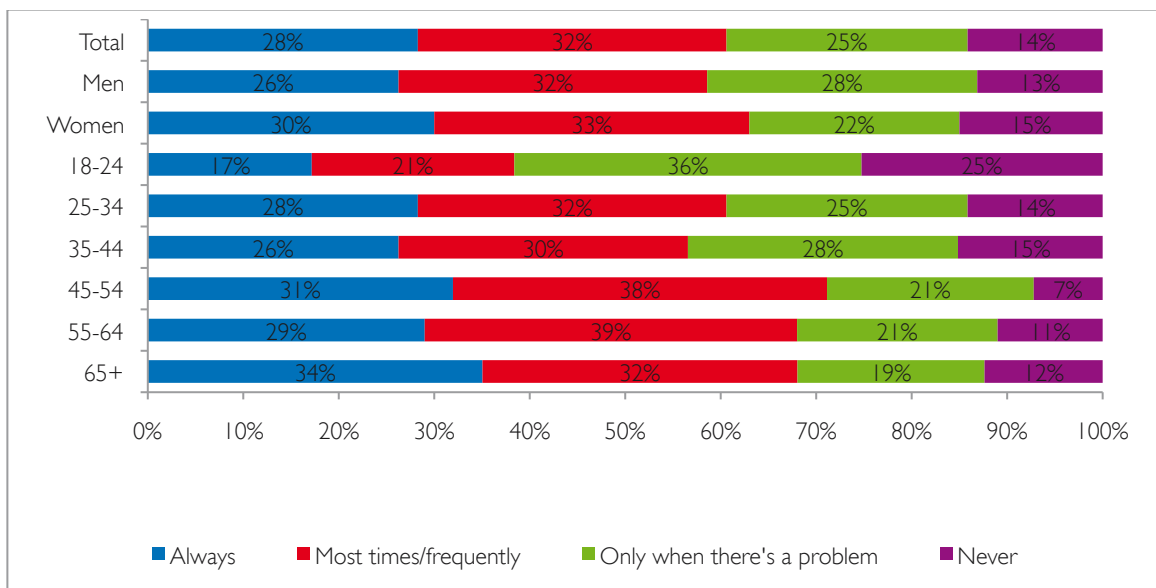


Figure 31: Do you read the manuals that come with new technology products?

Durability, Quality, Ease of Use and Price Are Key Drivers When Selecting New Technologies

When it comes to selecting new technologies, Americans are looking for something that is built to last, high in quality, easy to use and has the best price. These drivers have remained

consistent with the previous study. Women are more likely than men to want technologies that make their lives easier, save them time and allow them to personalize the features.

How important to you are the following when selecting new technology products? VERY IMPORTANT/SOMEWHAT IMPORTANT	Total	Men	Women
Built to last	94%	94%	94%
High quality	92%	93%	91%
Best price	92%	90%	93%
Easy to operate or use	92%	90%	93%
Works fast, no waiting time	89%	89%	90%
Makes my life easier	89%	86%	92%
Saves me time	89%	87%	91%
Easily upgradeable	88%	88%	88%
Easy to buy	85%	84%	87%
Able to upgrade as need or technology changes	83%	83%	84%
Have the most advanced benefits	81%	79%	84%
Ergonomic, takes human comfort into consideration	82%	82%	82%
Just does the basics, no unnecessary bells and whistles	73%	71%	75%
Looks attractive/handsomely designed	66%	66%	65%
Able to personalize with colors or features	63%	56%	70%
Any other reasons	93%	98%	87%

Companies May Be Out of Touch with Consumers and Technology

Four in 10 Americans feel that technology companies actually understand their needs when introducing new products – this has more than doubled since the 2004 survey. The majority feel that companies just introduce

items that they think will sell. In fact, one-third of Americans feel that tech companies have no idea what their lives are really like and what products they would be likely to use.

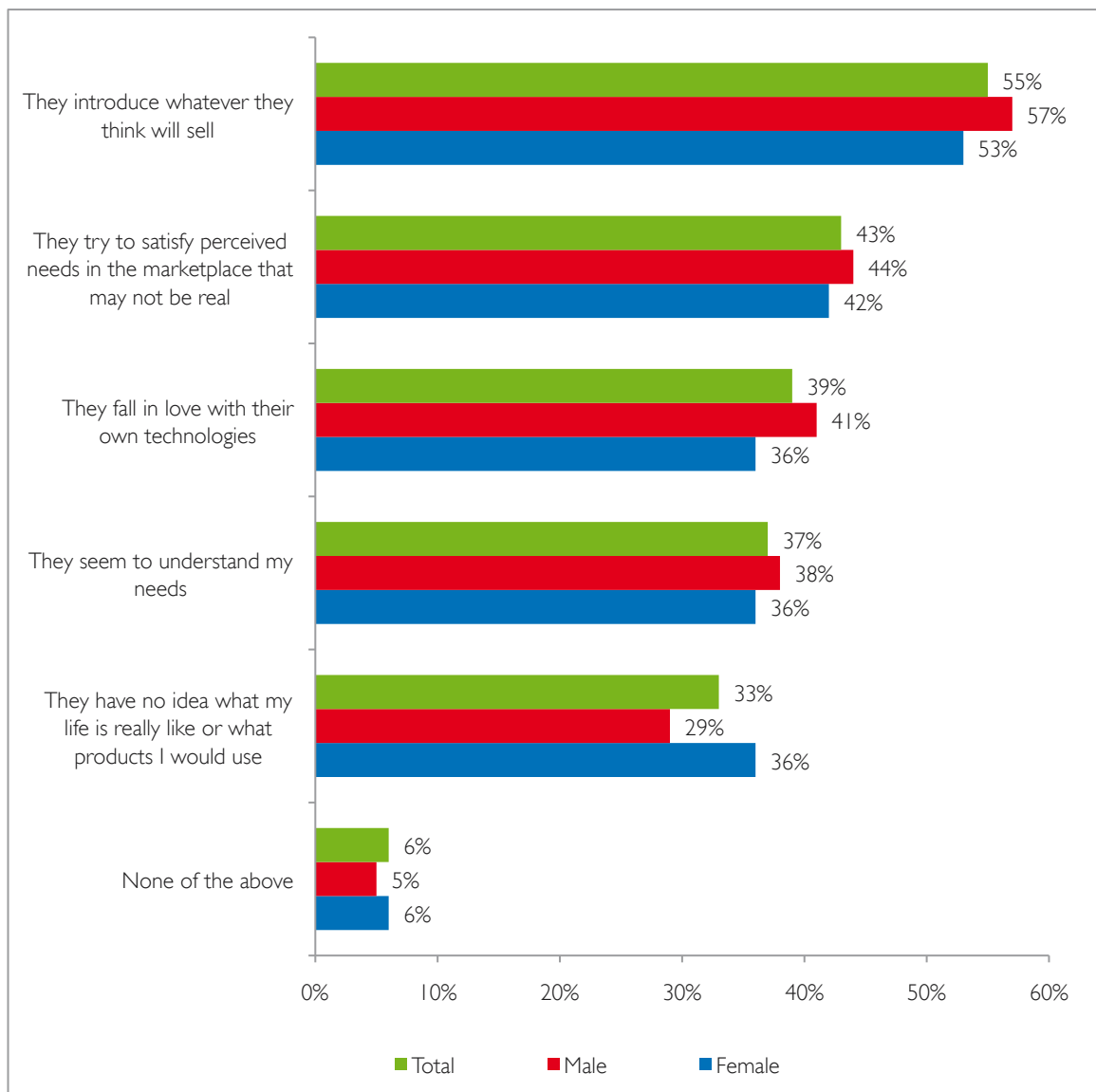


Figure 33: When technology companies introduce new products, how well do you feel they understand your needs? Would you say that usually:

Appendix A: 2004 to 2009 Methodology Differences

There are significant differences in the methodology of the 2004 and 2009 surveys.

The primary differences are:

- 1) The 2004 survey used a web-based online survey panel; the 2009 study was conducted by telephone.
- 2) Both surveys had 1,500 respondents. However, the 2004 sample was 57% women and 43% men. The 2009 sample was proportionate to the U.S. population. Since women are shown to be more attuned to and concerned with their own health care in comparison to men, some variations in levels of health care attitudes and behaviors can be expected as a result of the different sample characteristics.
- 3) Given that Internet household penetration in the U.S. has increased from 2004 to 2009, and the 2004 survey was done online and the 2009 survey was done by telephone, the relative technological savvy of respondents in each survey is different.

Readers of this report should keep these differences in mind while reviewing the results. It is important to not make precise number-to-number comparisons, although general observations and trends are appropriate.

For further information on the methodology, please contact Ms. Eryn Taylor at 1-646-935-4250.



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