

The Market for Wellness Programs and Their Impact on Pharmaceutical, Diagnostic and Device Product Markets

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Abstracts

At their most basic level, wellness programs represent an attempt to encourage good health and thereby decrease utilization of health care products and services. They have evolved out of necessity from the current U.S. health care system, in response to a variety of factors including continually rising costs of care and declining quality of life.

A Comprehensive Look at the 'Wellness' Industry

Utilization of wellness programs in the United States has experienced strong recent growth this is expected to continue through the forecast period. As more people participate in wellness programs, their usage of various health care products and services will be affected, as well the revenues of wellness program providers.

This report looks at the emerging wellness industry and estimates the market for wellness related products and services. This portion of the report examines:

Drivers of Wellness Services

Utilization Statistics

Major Companies and Offerings

Current Wellness Program Market Size

Innovative Approaches

Results of Programs

General Trends (Weak U.S. Economy, Postponing of Retirement, EMR, Rising

Interest in Anti-Aging)

Industry Trends (Internet-Based Wellness Programs, Usage of Financial Incentives, Emergence of Retail Clinics)

A Report No Pharmaceutical, Device or Testing Product Marketer Should Be Without

If wellness programs are effective, there should be an impact on all healthcare industries: pharmaceuticals, devices and diagnostics. Positive impact for some, negative for others. As part of Kalorama's unique analysis on this topic, this report also takes a look at how the popularity of wellness programs will effect other markets. The report estimates the positive or negative sales impact of wellness programs upon established U.S. markets for various health care products and services including:

Allergy Medicines

Cholesterol Reducers

Diabetes Drugs

Gastrointestinal Medications/Proton Pump Inhibitors

Hypertension Medicines

Over-the-Counter (OTC) Medicines

Influenza Vaccines

Cervical Cancer Vaccines

Diagnostic Tests

Cardiovascular, Gastric Banding, and other Devices

Surgeries,

Imaging

Other Medical Services

Within each of these market segments, products, services and/or sub-segments were selected that will particularly be affected by wellness programs. Products, services and/or sub-segments that are not expected to be significantly impacted were not included.

Sales estimates for each market segment represent U.S. revenues and are expressed in current dollars. Estimates are provided for the historic 2004 - 2008 period and forecasts are provided through 2013. Historical information for this report was gathered from a wide variety of published sources including company reports and filings, government documents, legal filings, trade journals, newspapers and business press, analysts' reports and other sources. Interviews with company representatives and other experts were conducted to capture the perspectives from industry participants' point of view and assess trends, and form the basis of the forecasting and competitive analysis.

Because this industry is extremely fragmented, with thousands of providers offering many different types of programs tailored to different patient populations, an effort was made to include a broad representation of groups. Companies profiled include:

Aetna

Azente Wellness

Cigna

Coleman Wellness Solutions

ConnectiCare

Corporate Wellness

ConvergenceHealth

CuraLinc Healthcare

Dynamic Wellness

Employee Health Management Systems

Hawaii Medical Assurance Association

incentaHEALTH

KC Wellness

Kersh Risk Management.

Kronos Optimal Health Company

Mayo Clinic Health Solutions

MedHealth Solutions

MO Healthnet

Multicare Health System

National Corporate Wellness.

Nuvita

PATH

Physicians Medical Group of Santa Cruz County

Preventure

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Pure Wellness

Summit Health..

San Francisco Wellness Initiative

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