

Worksite Weight Loss Programs: A Market & Competitor Analysis

December 2013

Table of Contents

	<u>Page</u>
<u>Introduction: Report Scope & Methodology</u>	1-4
<u>Executive Overview of Major Findings (\$250)</u>	5-18
<p>-Highlights of ALL chapters: Current status of the overall weight loss market, nature and structure of the worksite weight loss market, types of providers, types of programs, major market trends, findings of management interviews, market size & growth: 2005-2018 F (top competitor revenues), importance of outcome data, Findings of Rand Corp./other studies, dieter trends/preferences/demographics in 2011-2013, the top providers address list.</p>	
<u>Nature & Structure of the Worksite Weight Loss Market (\$75)</u>	19-26
<ul style="list-style-type: none">• Status report and summary• Programs by large commercial diet companies, health insurers, wellness program providers• Market Structure: Description of the different types of worksite weight loss Programs now offered• Findings of The Rand Health "Workplace Wellness Programs Study: cost savings, lbs. lost per person, ROI• Screening activities to identify health risks (measurement of body weight, for example)• Preventive interventions to address health risks (weight reduction counseling)• Health promotion activities• <u>Kaiser Family Foundation Study findings</u>• Likely effects of the Affordable Care Act• Avg. cost to the employer per person, financial incentives used• Overview of wellness programs and typical components• Employee attitudes toward worksite weight loss programs• Paying Employees To Lose Weight - Office Weight Loss Contests, Sample program: Healthy Wage	

The National Cost of Obesity (\$75)

27-37

- Scope of the problem, number of people affected, percent of population, obesity rate trends, costs in medical claims, lost productivity, absenteeism, etc.
- Medicare covers obesity counseling, private insurers to follow in 2014
- Dieter trends, preferences and demographics: 2012-2013
- Findings of Duke University study on costs of obesity
- Findings of Employee Benefit Research Institute survey,
- Demand for worksite weight loss programs: participation by men/women, by race, income of employees
- Employee backlash against employer programs.

Table

- No. of Americans diagnosed with diabetes: 1980-2010.
-

Status of the Overall U.S. Weight Loss Market (\$200)

38-68

- Status report of weight loss mkt. conditions in 2013
- Why the Jan. – May prime diet season was a bust this year
- Popular fad diets of 2013
- Major market and company developments: Nestle sells Jenny Craig to private equity firm, Jenny launches monthly plan, Rx diet drug sales still paltry, Obamacare's effect on weight loss programs/insurance coverage, the diet/fitness apps challenge (MyFitnessPal)
- Discussion of recent success of MLM as a sales method for diet products
- 3rd quarter and 9-month detailed sales/profit performance of the major diet companies: Weight Watchers, NutriSystem, Medifast, eDiets.
- 2013 market forecasts
- Major diet market developments of 2011-2012
- Dieter demographic trends: DIY diet cycle, no. of Americans dieting, by gender, preference for various food plans, dieter budgets, preferred location

Tables:

- \$ Size of the U.S. weight loss market: 1989-2012, by market segment
- 2016 annual growth forecasts, by mkt. segment.
- No. of dieters by method used: commercial chains, MDs, RDs, hospitals, worksites, surgery, retail meal replacements and diet pills.

Market Size & Growth (\$100)

69-76

- Summary
- Findings from the ShapeUp Employer Wellness Survey: avg. cost to the employer per person yearly
- Estimates of minimum market \$ value based on individual company estimates, using Weight Watchers' public data from conference calls and investor presentations. Estimates for worksite programs revenues for Wt. Watchers, NutriSystem, Jenny Craig, Medifast, 7 other companies.
- Alternative estimation method: 20013-2013 trends in BestDietForMe.com metrics - % of dieters using worksite wellness programs, yearly averages, rising percentage.
- Discussion of rationale for estimates, status of the overall weight loss market, Obamacare provisions, dieter preferences.
- Marketdata's 2014 Outlook and 2018 forecasts

Table

- Estimated Size of the U.S. Worksite Weight Loss Programs Market: 2005-2018 Forecast.

Competitor Profiles: The Major Providers (\$595)

77-139

In-depth descriptions of each company and program and its features, estimated revenues when possible, number of participants, employer costs, strategies used, headquarters address.

Competitor Profiles For:

- Weight Watchers Intl.
- NutriSystem
- Jenny Craig Intl.
- Medifast
- Health Management Resources
- Robard Corp.
- Optifast (Nestle Healthcare Nutrition)
- Lindora Medical Clinics
- Medi-Weightloss Clinics
- YMCA – United Health DCPA
- ShapeUp
- BMIQ (Emblem Health)
- Omada Health
- WELCOA (Wellness Councils of America)
- Balance Health
- Sparkpeople.com

Continued

- Mayo Clinic
- Retrofit
- Nutrition Quest
- Alere Wellbeing
- Vtrim
- Healthways
- Health Media

Reference Directory of Weight Loss Market Information Sources

140-147

Name/address list of relevant consultants, trade groups, magazines and journals, reports, surveys, other research companies.