RAB Instant Background - Mental Health Clinics and Counselors

Consumer Insights

Who Buys

Profiling adults 18+ who visited a psychiatrist in the last 12 months:

	Visited a psychiatrist in last 12 months
Male	35.5%
Female	64.5%
18-24	14.2%
25-34	24.1%
35-44	18.5%
45-54	16.9%
55-64	17.3%
65+	8.9%
Household Income: \$100K+	32.1%
Household Income: \$75,000-\$99,999	14.7%
Household Income: \$60,000-\$74,999	5.9%
Household Income: \$50,000-\$59,999	7.7%
Household Income: \$40,000-\$49,999	7.4%
Household Income: \$30,000-\$39,999	7.5%
Household Income: \$20,000-\$29,999	8.0%
Household Income: Under \$20,000	16.8%
Race: White	75.5%
Race: Black/African American	10.5%
Race: Other Race/Multiple Classifications	14.1%
Hispanic, Latino or Spanish Origin	15.1%
Census Region: North East	21.6%
Census Region: South	35.6%
Census Region: Midwest	16.3%
Census Region: West	26.5%

Annual prevalence of mental illness among U.S. adults, by demographic group: Asian, 14.7%; White, 20.4%; Black or African-American, 16.2%; American Indian or Alaska Native, 22.1%; Mixed/multiracial, 26.8%; Hispanic or Latino, 16.9%; Lesbian, Gay or Bisexual, 37.4%.

(Source: Mental Health America, 2020)

(Source: Mental Health America, 2020)

(Source: National Alliance on Mental Illness, 2020)

(Source: GfK MRI Doublebase, 2020)

Total Radio Weekly Dayparts Cume: Monday - Sunday 24- Hour

Single

Married

lifetime.

Divorced/Separated/Widowed

(Source: Office of Disease Prevention and Health Promotion, 2020) 18% (44 million) of US adults suffer from some type of mental illness.

Illicit drug use is more likely to result in a visit to the emergency room or overdose for men than it is for women. Illicit drugs include the use of illegal drugs and the misuse of

An estimated 26% of Americans age 18 and older are living with a mental health disorder in any given year, and 46% will have a mental health disorder over the course of their

37.0%

42.0%

21.0%

85.6%

Prevalence of mental health conditions in specific communities: Black/African American, 17%; Hispanic, 15%; Native American, 23%; Asian/Pacific Islander, 13%; multiracial,

25%; LGBTQ+, 37%.

prescription drugs. This trend is consistent across age groups

(Source: National Alliance on Mental Illness, 2020)

Women are more likely to struggle with anxiety, depression, eating disorders and borderline personality disorder, conditions that are also treated by mental health practitioners.

ADHD is most commonly diagnosed in young people. An estimated 8.8% of children aged 4-17 have ADHD. While ADHD is usually diagnosed in childhood, it does not only affect

(Source: National Alliance on Mental Illness , 2020)

children. An estimated 4.4% of adults aged 18-44 have ADHD

(Source: National Alliance on Mental Illness, 2020) Schizophrenia affects about 1% of Americans. Although it can occur at any age, the average age of onset tends to be in the late teens to the early 20s for men, and the late 20s

to early 30s for women. It is uncommon for schizophrenia to be diagnosed in a person younger than 12 or older than 40.

Symptoms of obsessive-compulsive disorder (OCD) typically begin during childhood, the teenage years or young adulthood, although males often develop them at a younger age than females. More than 2% of the U.S. population (nearly 1 out of 40 people) will be diagnosed with OCD during their lives.

(Source: National Alliance on Mental Illness, 2020)

(Source: National Alliance on Mental Illness, 2020)

The average age-of-onset for bipolar disorder is about 25, but it can occur in the teens, or more uncommonly, in childhood. The condition affects men and women equally, with

about 2.6% of the U.S. population diagnosed with bipolar disorder and nearly 83% of cases classified as severe. (Source: National Alliance on Mental Illness, 2020)

PTSD (Post-Traumatic Stress Disorder) affects 3.5% of the U.S. adult population -- about 7.7 million Americans -- but women are more likely to develop the condition than men. About 37% of those cases are classified as severe. While PTSD can occur at any age, the average age of onset is in a person's early 20s.

(Source: National Alliance on Mental Illness, 2020)

What They Buy

In 2020, 62.5% of Mental Health and Substance Abuse Clinics industry revenue was generated through outpatient treatment for mental illness only, and 25.4% of industry revenue was generated through outpatient treatment for substance-abuse disorders only.

(Source: National Alliance on Mental Illness, 2020)

Opioid misuse is becoming increasingly lethal, where opioids accounted for 67.8% of more than 70,200 overdose deaths in the US in recent years.

(Source: Centers for Disease Control and Prevention, 2020)

Experts are now increasingly recommending turning to telehealth – including telemedicine and teletherapy – as the first option for most non-emergency care.

(Source: IBISWorld, 2020)

(Source: IBISWorld, 2020)

The products and services segmentation for mental health & substance abuse clinics in the US in 2020: Outpatient treatment for co-occurring disorders, 12.1%; outpatient treatment for substance abuse disorders only, 25.4% and outpatient treatment for mental disorders only, 62.5%.

When They Buy Half of all mental disorders begin by age 14 and three-quarters by age 24.

Seasonal Affective Disorder (SAD) is a type of depression that comes and goes with the seasons, typically starting in the late fall and early winter and going away during the spring and summer. Depressive episodes linked to the summer can occur, but are much less common than winter episodes of SAD.

(Source: National Alliance on Mental Illness, 2020)

(Source: National Institute of Mental Health, 2020)

Where They Buy

The number of enterprises is projected to increase an annualized 4.4% between 2020 and 2025, totaling 15,554 operators. (Source: IBISWorld, 2020)

Business concentration of mental health and substance abuse clinics in the US in 2020: California, 9.5%; Pennsylvania, 5.3%; New York, 5.2%; Florida, 5.2%; North Carolina,

(Source: IBISWorld, 2020)

4.3%; Ohio, 4.1%; Texas, 3.7%; Illinois, 3.3%; Washington, 3.1%.

According to research by Mental Health America, states with the highest prevalence of mental health and substance use issues: 1. Oregon; 2. Idaho; 3. Alaska; 4. Washington; 5. Utah; 6. Montana; 7. Nevada; 8. Colorado; 9. Vermont; 10. Massachusetts; 11. Maine; 12. Wyoming; 13. West Virginia; 14. New Mexico and 15. Rhode Island. (Source: Mental Health America, 2020)

Based on research by Mental Health America, states with the lowest rates of access to care: 1. Texas; 2. Georgia; 3. Nevada; 4. Mississippi; 5. South Carolina; 6. Alabama; 7.

Major market segmentation for mental health & substance abuse clinics: Medicaid reimbursements, 27.5%; reimbursements from private health insurance plans, 21.0%; all

other sources of revenue, 19.5%; Funding from other government programs, 16.7%; contributions, gifts and grants received, 6.2% Out-of-pocket payments from patients and

Wyoming; 8. North Carolina; 9. Kansas; 10. Tennessee; 11. Louisiana; 12. Florida; 13. Oklahoma; 14. Utah and 15. Virginia.

How They Buy

families, 5.7% and Medicare reimbursements, 3.4%.

(Source: IBISWorld, 2020)

(Source: Mental Health America, 2020)

Why They Buy

remaining under social distancing guidelines. (Source: IBISWorld, 2020)

The introduction of telehealth, which describes patient counseling through internet services, has enabled many at-risk individuals to seek treatment and consultation while

An expected increase in federal Medicaid and Medicare spending, rising disposable income and the large number of people battling substance abuse are expected to drive demand growth moving forward. (Source: IBISWorld, 2020)

disposable income is expected to decrease in 2020.

(Source: IBISWorld, 2020)

In any given year, an estimated 18.1% (43.6 million) of U.S. adults ages 18 years or older suffered from any mental illness and 4.2% (9.8 million) suffered from a seriously

Industry revenue is expected to grow an annualized 4.2% during the five-year period, totaling \$24.5 billion in 2020. Conversely, industry profit, measured as earnings before

As per capita disposable income rises, treatment services become more affordable for those who seek them, which boosts demand for industry operators. Per capita

(Source: U.S. Department of Health and Human Services, 2020)

(Source: IBISWorld, 2020)

interest and taxes, is forecast to decline over the past five years.

Business Information

debilitating mental illness.

County, state and federal funding for Medicare and Medicaid, combined with reimbursement levels, affect the affordability of mental healthcare and thus demand for industry services. Medicare and Medicaid generate almost one-third of industry revenue. Federal funding for Medicare and Medicaid is expected to increase in 2020, presenting a

potential opportunity for the industry.

(Source: IBISWorld, 2020)

Private health insurance coverage makes treatment affordable for those who seek industry services, increasing demand from individuals who are now able to access the care they need. Government initiatives focused on mental health parity further contribute to demand from this group. In 2020, the number of people with private health insurance is expected to decrease.

(Source: IBISWorld, 2020)

Why Radio Radio has established itself as an excellent vehicle for advertisers to deliver their messages to an increasing number of consumers. Each week, radio reaches 89.1% of persons ages 18+, and 62% of these consumers on a daily basis. In all, more than 226 million Americans ages 18-and-older listen to radio every week.

(Source: Nielsen Audio, 2020)

Miscellaneous Industry Facts or Category Trivia Over the five years to 2020, an increase in access to treatment programs and the expanding US drug epidemic have driven revenue growth for the industry. Over the five years

to 2020, industry revenue is forecast to grow an annualized 4.2% to reach \$24.5 billion.

National Institute of Mental Health:

(Source: IBISWorld, 2020)

Relevant Links

National Alliance on Mental Illness: www.nami.org

www.nimh.nih.gov

Substance Abuse and Mental Health Services Administration: www.samhsa.gov

Mental Health America:

www.mentalhealthamerica.net (Source: RAB, 2020)