



## Health + Wellness 2019

### FROM MODERATION TO MINDFULNESS

The latest in The Hartman Group's long-running syndicated research series on health and wellness, **Health + Wellness 2019: From Moderation to Mindfulness** explores what's new, what's mainstream and what's around the bend in the world of health and wellness. Many measures are trended over time and show significant change over the past 3-5 years, including foods and ingredients consumers are seeking or avoiding, supplement usage, conditions managed, and even what health and wellness itself means.

Combining our signature focus on trend-setting wellness consumers with an oversample of Gen Z (18-21 years of age), **Health + Wellness 2019** also offers a glimpse of what the health and wellness concerns and trends of the future may look like. Additionally, this year's report includes a special focus on cannabis for health and wellness, exploring consumers' attitudes, usage occasions and reasons for using cannabis from a health and wellness perspective.

With all this, and more, **Health + Wellness 2019: From Moderation to Mindfulness** is an essential report for any company with a stake in the health and wellness space.

#### About the Study

Our trademark combination of rich qualitative and robust quantitative methodologies results in insights oriented not just toward the *what* but also the *why* and *how*. The integration of these insights is important not just for understanding and marketing to consumers' current practices and future goals but also for identifying white space opportunities ripe for innovation and product development.

#### Methodology

Our Health + Wellness syndicated study series is built upon an integrated methodology combining qualitative ethnography and a quantitative online survey.

**Quantitative Custom Survey:** nationally representative online survey of minimum n=1,904 U.S. adults (18-73). Readable samples of standard demographics (e.g., gender, generational cohorts, children in household). Wherever possible, measures are trended over time.

**Qualitative:** a combination of in-person ethnographic interviews and virtual qualitative engagements with consumers across the U.S.

## What You Get

General report (PowerPoint and PDF) including executive summary and demographic data tables (Excel).

**Report Price:** ~~\$15,000~~ Now: \$12,500

Release Date: March 2019

Report Length: 113 pages

Market Coverage: U.S. market

*The order form to purchase the report can be found on the last page.*

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## What's Inside the Report

### Methodology

#### Executive Summary

- Because demographics don't determine consumers' engagement with health and wellness, we utilize a unique approach to segment consumers based on their levels of interest, knowledge, and action.
- Key indicators of health, generational differences, prominent aspects of how consumers understand health and wellness, what influences physical fitness.
- Shifting consumer understandings of Health + Wellness.
- In addition to exercise and medicine, the categories of food, beverages, and supplements have been the traditional avenues through which consumers have approached daily healthy living.
- How consumers shop is a reflection of their H+W values, but due to barriers of time, money, and the everyday demands of living, consumers usually find themselves having to make trade-offs in their shopping.
- Special topic: Cannabis for Health + Wellness. Cannabis in all its varied forms promises significant disruption in the H+W industry, from food and beverages to supplements to pharmaceuticals.

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### The World of Health + Wellness (H+W)

- The Hartman Group's World of Health + Wellness Consumer Segmentation
- Consumers' attitudes toward health and wellness: proactivity and knowledge, healthy diet of fresh, less processed foods, seeking alternative remedies, learning and trying new things
- Demographic composition of the health and wellness segments
- A consumer's location within the World of H+W influences their prioritization of purchase criteria
- H+W trends, including purchase criteria, originate with the Core, are adopted to varying degrees by the Mid-level, and influence the Periphery
- Consumer segment profiles
- The World of Health + Wellness key takeaways

### Past, Present, Future: What's New in Health + Wellness?

- H+W today: Where are we now?
  - Health + Wellness: the Nineties to Now
  - H+W today: Where are we now? The Age of Anxiety
  - H+W today: Where are we now? What does health and wellness mean to you?
  - Consumers' attitudes toward current state of America's mental and physical health
  - H+W approaches and practices fall into three modes, all of which are essential to overall well-being
  - And ideal approach to health and wellness
  - Ideal approach to H+W by consumer segments
  - Sources of health and wellness information: sources used and trusted
  - Key takeaways
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#### **H+W State of the Union**

- Weight: BMI by Segment and Demographic
  - Personal Health Assessment Relative to All U.S. Adults
  - Shifting focus away from pounds and inches
  - Conditions Treating and Preventing in Household
  - Remedies for Treating/Preventing Conditions
  - Conditions Actively Treating in Household – By Generation
  - Needs and limits related to life stage / New generational concerns
  - Triggers of Changing View on H+W
  - Key takeaways
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#### **Healthy Living Today: Food and Beverage**

- Managing food and beverage: What “healthy eating” means
- What a healthy diet means by wellness segment
- Purchase criteria: “I look for food and beverages that...”
- Purchase criteria: “I look for food and beverages that...” (by generation)
- Generational profile: younger consumers
- Ingredients adding/increasing in diets
- Ingredients avoiding/decreasing in diets

- Approaches to eating: who is minimizing meat?
  - Veganism insights
  - Eating approaches tried in past 12 months
  - Avoiding gluten or lactose
  - Key takeaways
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### **Healthy Living Today: Supplements**

- Supplement usage in the past 12 months
  - Top 20 supplements used in the past 12 months
  - How many supplements are consumers taking?
  - Trends in supplement usage
  - Vitamins, Minerals, and Herbal Supplements Used in Past 30 Days
  - Supplement v. OTC usage
  - Supplement usage and protein
  - How consumers evaluate supplement quality and efficacy
  - Key takeaways
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### **Healthy Living Today: Mental and Emotional Well-being**

- Managing mental and emotional well-being
  - Retreat & Regroup is an essential part of H+W for all consumers
  - Mental and emotional well-being: discipline and consistency
  - Exercise as a mental health remedy
  - Unpacking “mindfulness”
  - Key takeaways
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### **H+W at Retailers and Restaurants**

- Food sourcing for health and wellness
- What shopping for health and wellness means
- Retailer Performance in H+W Purchasing / Differences in H+W Shopping
- Who buys private label/store brand products

- Barriers to purchasing health and wellness products
  - H+W retailer performance leaders (by channel and banner)
  - Focus on Amazon H+W shopping
  - H+W at retailers: key takeaways
  - H+W at restaurants: past 3 months restaurant visitation
  - Attitudes and behaviors on healthy eating when dining out
  - Reasons for Eating Less Healthfully When Dining Out
  - How well do you think (type of) restaurant performs when it comes to providing healthy options?
  - Reasons for Eating MORE Healthfully Dining Out
  - H+W at restaurants: key takeaways
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### **Special Topic: Cannabis for Health + Wellness**

- Background and methods / cannabis usage
- Cannabis Overview: Recreational and medical cannabis legalization and decriminalization in the U.S. continues to progress on a state-by-state level
- Cannabis Overview: Consumers' perceptions of cannabis and shifting views
- Cannabis Overview: Broad categories of cannabis markets
- Reasons for using cannabis
- Consumer interest in using cannabis
- Attitudes toward cannabis usage
- Cannabis purchasing and usage in practice
- Type of cannabis products purchased / cannabis frequency of usage
- Types of Cannabis Products Purchased (Past 12 months among P12M H+W cannabis users)
- Cannabis purchasing and usage: aspects of THC use
- Cannabis purchasing and usage: CBD emergence
- How consumers currently interpret the legality of cannabis purchasing and usage
- Negative Attitudes Around Cannabis
- Top Barriers to Purchasing Cannabis Products
- The Future of Cannabis and CBD
- Cannabis for H+W: key takeaways

### **Implications and Recommendations**

**Health + Wellness 2019 Syndicated Report Order Form**

To order the **Health + Wellness 2019** report, please fill out the form below and return to:

Blaine Becker  
Senior Director, Marketing  
f: 425.452.9092  
e: blaine@hartman-group.com

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