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HEALTH + WELLNESS 2017

EXECUTIVE SUMMARY | ORDER FORM

THE JOURNEY CONTINUES. The Hartman Group has been leading the study of health and wellness since the early 1990s. Over decades of mapping consumers' evolving views, aspirations and adoptions, we have become undisputed experts in the field through our unique combination of quantitative rigor and rich ethnographic detail. Health + Wellness 2017 applies this innovative approach to continue our exploration of health and wellness in the U.S. market and culture at large. The research identifies the factors and trends driving demand for healthy foods and beverages as well as other wellness products and services.

Background & Approach

The Hartman Group's series of health and wellness syndicated studies is the longest-running consumer-centric study of the U.S. wellness marketplace and provides current, comprehensive insight into underlying motivations and behaviors for how and why consumers live, shop and use brands, products and services in the health and wellness space.

Health + Wellness 2017 updates and extends The Hartman Group's previous work, showing changing attitudes, behaviors and emerging trends. We will also apply our signature "ahead-of-the-curve" thinking for marketing health and wellness solutions to consumers with our inclusive focus on trendsetters, early adopters and more mainstream consumers. The report delivers a culturally based big-picture assessment of where health and wellness is today, where it is headed and what it means for your business.

Study Objectives
Areas of examination included:

- Meaning of H+W and changes in viewpoints
- H+W attitudes and behaviors
- Information sources
- Health assessment, conditions treating/preventing, remedies used
- Ingredients/foods adding or avoiding
- H+W product shopping, purchase criteria, and usage

Methodology

Quantitative Methodology
Nationally representative survey, fielded online January, 2017 (n=1,788). General U.S. population, ages 18-84.

Qualitative Methodology
- Fielded January-February 2017
- In-home ethnographies: 2-hour in-home individual interviews, including a tour of wellness spaces and kitchen food storage
- Virtual interviews: 75-minute interviews via Skype
- Homework: All respondents completed a homework assignment prior to their interview, involving photos of key wellness items and the contents of their kitchen and pantry, a brief writing assignment and/or worksheet.
- Ages 24-67
- Mix of H+W segments, gender, household income, children/no children <18 in HH, race/ethnicity, census regions

Executive Summary

Wellness Culture Today
The Hartman Group has been tracking consumers' perspectives and behaviors around Health + Wellness (H+W) since the 1990s. In that time, we have seen consumer definitions of H+W shift from a rules-based, reactive paradigm to a proactive wellness culture where ideas about what H+W is and how to achieve it have broadened to encompass many, if not all, aspects of consumers' lives.

- This includes diet, the ebb and flow of energy, sleep and rest, activity and exercise, mindfulness and emotional outlook, mental health, social engagement, and work-life balance.

The concept of balance remains key to how consumers understand and embody H+W; when one aspect of their H+W grows too big or too small, it affects all the others. Rather than a mechanistic, defensive approach, consumers are more likely today to see H+W in a more ecological way, as a system that needs harmony inside and out.

Self-Knowledge and Personal Responsibility
Rather than one-size-fits-all rules from traditional health authorities, wellness culture today emphasizes self-knowledge and personal responsibility.

- However, consumers acknowledge that support is critical and comes from a variety of sources –friends and family, retailers and product manufacturers, sources of knowledge, and conventional and alternative care practitioners.

Feeling Good
Mental and emotional health is as important as physical health in wellness culture, and "feeling good" is prioritized over "looking good," although consumers do still place physical health high on their lists of both H+W definitions and goals for improvement.

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ABOUT THE REPORT

Product Price:

- ~~$15,000~~ now: $10,000

Release Date: March 2017
Report Length: 120 pages
Market Coverage: U.S. market

To purchase the report, fill out the order form on the last page of this overview.

Executive Summary

- Definitions of H+W tend to broaden with age, presumably as consumers are forced to grapple with more health issues.
- However, for Millennials and Gen X, broadly defined wellness culture is fully mainstream, and even those who are currently less engaged with H+W overall believe in similar definitions of H+W, a healthy lifestyle, a healthy diet, and how to achieve it.

The World of H+W Segmentation
As in past years, we segment consumers according to their engagement in the World of Health + Wellness.

- Core consumers are the smallest segment and the most knowledgeable and engaged; they are the trendsetters, early adopters, evangelists, and systems thinkers.
- The Inner Mid-level and Outer Mid-level account for the majority of consumers at 62%. Mid-level consumers adopt trends pragmatically from the Core, but their knowledge tends to be shallower and more personally motivated.
- The Periphery are the least engaged with H+W – they may have goals to eat better or exercise more often, but they tend to prioritize other things.

Healthy Eating
Healthy eating remains the center of most consumer notions of H+W. For most, healthy eating is defined by fresh, whole, less processed foods, which consumers believe retain more of their nutrients.

- This focus, along with the continuing reversal of attitudes around sugar and fat, has undermined consumer trust in "traditional" dietary guidelines, represented by the USDA's now-retired food pyramid. Consumers across the spectrum of H+W have redefined this pyramid to align with new knowledge, personal dietary regimens, and perceived deficiencies.
- More consumers than ever are experimenting with their diet, and free-from diets are on the rise. As they make dietary changes, Mid-level consumers start by trading up to "better-for-you" versions of their staples, such as replacing soda with sparkling water and white bread with whole wheat. More are using plant-based proteins, meats, and cheeses –especially Millennials.
- Use of supplements also continues to rise, as consumers seek to correct for potential imbalances in their diets or address personal H+W issues both physical and mental. Bridging the world of food and supplements, even Periphery consumers are taking probiotics, indicating that digestive health has moved squarely into the mainstream.

Healthy Habits
H+W consumers from Core to Periphery recognize the need to support wellness not only with diet but with a full suite of healthy habits. While we see some evidence that more are beginning to address dietary issues, it appears much more difficult to build consistent routines around these other habits.

- Exercise, for instance, has moved from being a weight-loss tool to a mood and energy management strategy, giving it even more prominence in consumers' H+W goals, yet even many engaged consumers struggle to prioritize it.

- Sleep is similar – consumers appear to value it more than ever, but they continue to complain about getting too little.
- The tense political climate has made self-care and social engagement feel more important for many consumers. The need to recognize sources of stress and negativity, work on coping strategies to improve mindfulness, and manage both negative social engagement and negative media engagement seem to have taken on a greater intensity.

Healthcare and Regulation
Though not top of mind until it's needed, healthcare access and options are critical components of H+W, especially when things go wrong.

Although we see little progress in terms of overall levels of obesity and other chronic "lifestyle" conditions, we do see more Americans appearing to come to terms with their health, likely aided by more healthcare options.

- Perhaps fittingly, the majority of consumers also support greater regulations in food and beverage labels, and 4 in 10 support junk food taxes.

At the same time, we see an erosion of trustin conventional medicine and other traditional health authorities and the mainstreaming of a broad array of alternative care options.

- This erosion of trust is likely due to a combination of factors, including the perception of a profit-driven system. Nevertheless, most people are satisfied with their current health insurance plans and are worried about future changes.

Shopping and Retail
When it comes to shopping, consumers continue to move between channels and retailers according to occasion, preference, and products sought.

- However, some channels and retailers deliver on H+W better than others. They do so through a combination of store environment, selection, and clear communication of product standards.
- Yet the store that bests aligns to consumers' values is not always the one they shop most –the natural/specialty channel actually captures a smaller number of its P3M customers' H+W purchasing than any major channel, despite being top of mind as a H+W shopping destination.
- Grocery rivals mass and drug when it comes to H+W purchasing. H+W-focused consumers notice and appreciate when their local grocery store increases their range of organic, natural, and free-from options.
- •Bridging the retail and restaurant world, grocerants and extensive prepared offerings have made some grocery retailers a destination for health-conscious shoppers, who appreciate the quality of the food and being able to know ingredients and other nutrition information and customize their meals.

Food Service
At restaurants, most consumers still tend to de-prioritize H+W in favor of convenience, experience, and indulgence. H+W strategies tend to focus on cuisine, with Asian fare seen as inherently "lighter" than others.

Report Order Form

To purchase this report, please return the signed order form by email or fax to:

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General report (PowerPoint and PDF) and demographic data tables (Excel)

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