

Methodology: Quantitative

SURVEY TOPICS

Understanding:

- Health and wellness and what consumers do to stay healthy
- Consumer priorities when it comes to health and wellness
- Current health conditions of concern and modalities for treatment
- Trusted sources of information
- Ingredients consumers are seeking and avoiding
- Role of indulgence in health and wellness

METHODOLOGY

- Online national survey January 23, 2023–February 5, 2023
- n=2,175 U.S. adults aged 18–77
 - Margin of Error (MOE) $\pm 2.0\%$ at 95% confidence level
- Respondents recruited as a nationally representative sample
 - Balanced by age, gender, division, income, race / ethnicity, and presence of children to match the 2022 Census Bureau Current Population Survey
- Readable samples include, plus other key demographics:
 - Age cohorts: Gen Z n=318, Millennial n=601, Gen X n=614, Boomer n=642
 - Race / ethnicity: Caucasian n=1493, African American n=303, Hispanic n=313, Asian / Pacific Islander n=303 (note groups are not mutually exclusive)
 - Household income: <\$35,000 n=490, \$35,000–\$99,999 n=939, \$100,000 and over n=702
 - Household structure: Single-person household n=471, Adult-only household n=1131, Households with children n=322

READING THE CHARTS

Main charts



Age cohorts



Gen Z



Millennials



Gen X



Boomers

Wellness segment



Core



Inner Mid-Level



Outer Mid-Level



Periphery

Household income



<\$35K



\$35K-<\$100K



\$100K+

Household structure



Single-Person Households



Adult-Only Households



Households with Kids

Indexing, Significance testing and Trend

Indexing is used in most of the report to show comparisons versus the total. In cases of wellness segmentation, significance testing at the 95% confidence level is used.

^ notates where statistically significant point changes at the 95% confidence level vs. 2021 and/or 2019 are shown.

Consumers face many challenges to achieving ideal health; their primary barriers tend to be internal, though external forces also play a role

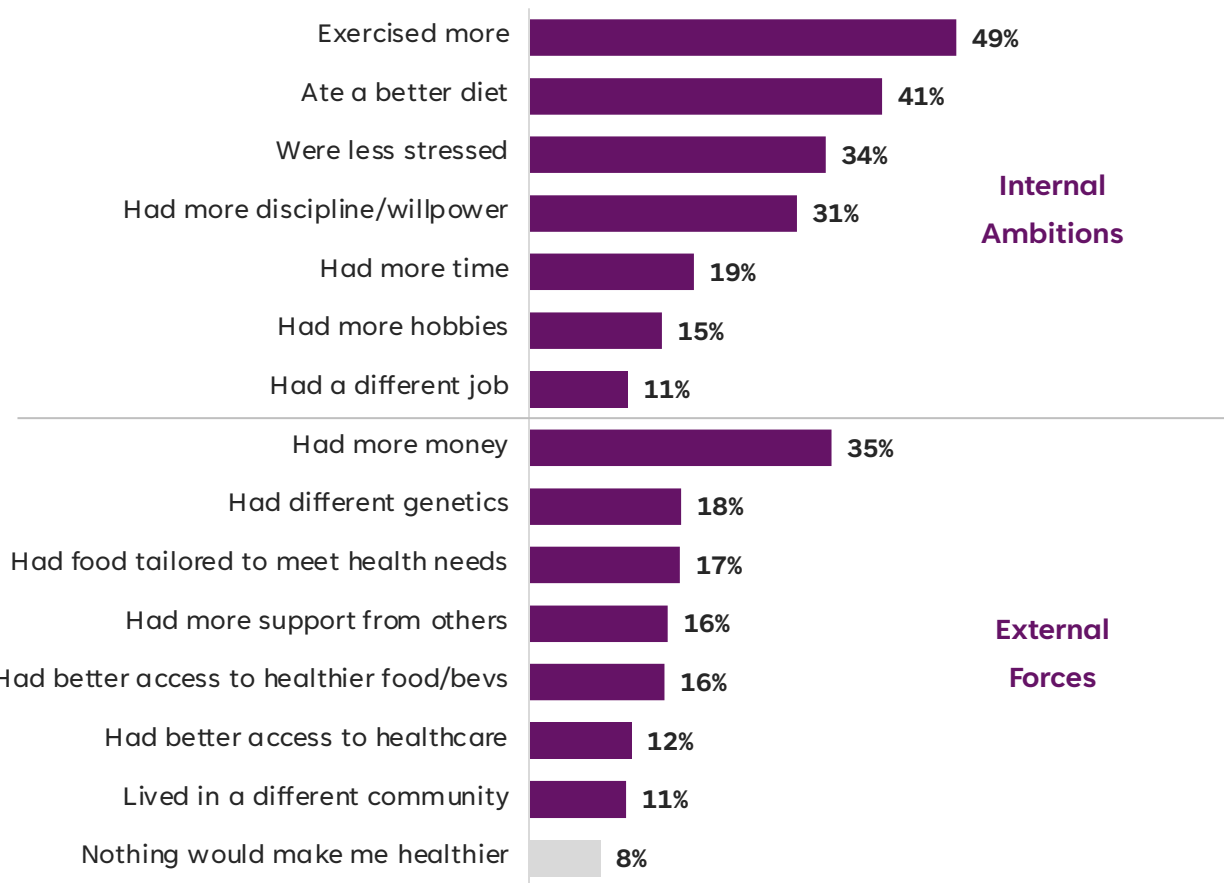
Exercise and diet are the top areas where consumers report they could make changes to improve their health. These are examples of internal aspirations for better health and wellness, while factors such as financial barriers, genetics, and access to healthy and personalized foods are external forces that can also act as barriers but impact fewer consumers. The prevalence of internal ambitions blocking achievement of ideal health indicates that consumers continue to view themselves as primarily responsible for their health, even as they recognize the barriers presented by external or systemic factors.

I guess time and energy is really the biggest issue for me. I work a pretty vigorous job and I'm just really beat when I come home from work. I try to take a walk at lunchtime. However, the issues I've had with my knee in the last couple of years have greatly limited my ability to walk and move and exercise comfortably. So it's really a question of my own personal dedication and interest to keep the weight off and to exercise.

– Sara, F, Boomer

I Would Be Healthier if I...

Among Total



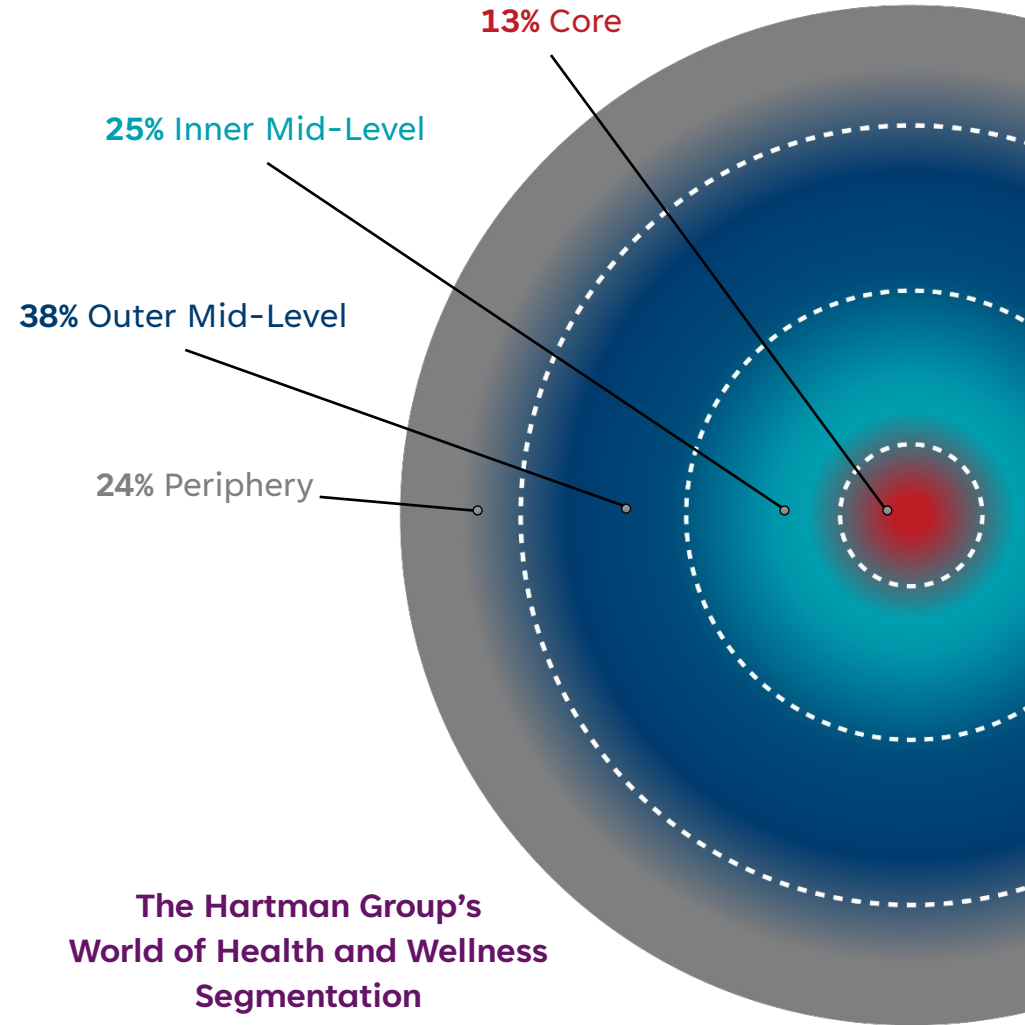
Health & Wellness 2023. C7. Looking at your overall health and wellbeing, what, if anything, do you think would make you healthier? (Select all that apply) I would be healthier if I... Base: Total n=2175

The Hartman Group's World of Health and Wellness (H&W) segments consumers based on aspirations, behaviors, and resulting level of engagement with health and wellness

All consumers participate in health and wellness to some degree, but their specific attitudes and behaviors around health and wellness vary widely. As in previous studies on this topic, here we employ our World of Health and Wellness model to segment consumers based on their level of engagement with health and wellness.

This model takes into account both aspirations and actions as they relate to health and wellness, and while many aspirations are shared across the four segments, actual behavior tends to vary more significantly. Consumers who are more engaged—and therefore closer to the Core—tend to show greater alignment between their aspirations and actual behaviors. The World of H&W offers a framework to understand how consumers relate to health and wellness and how trends develop and proliferate in this space.

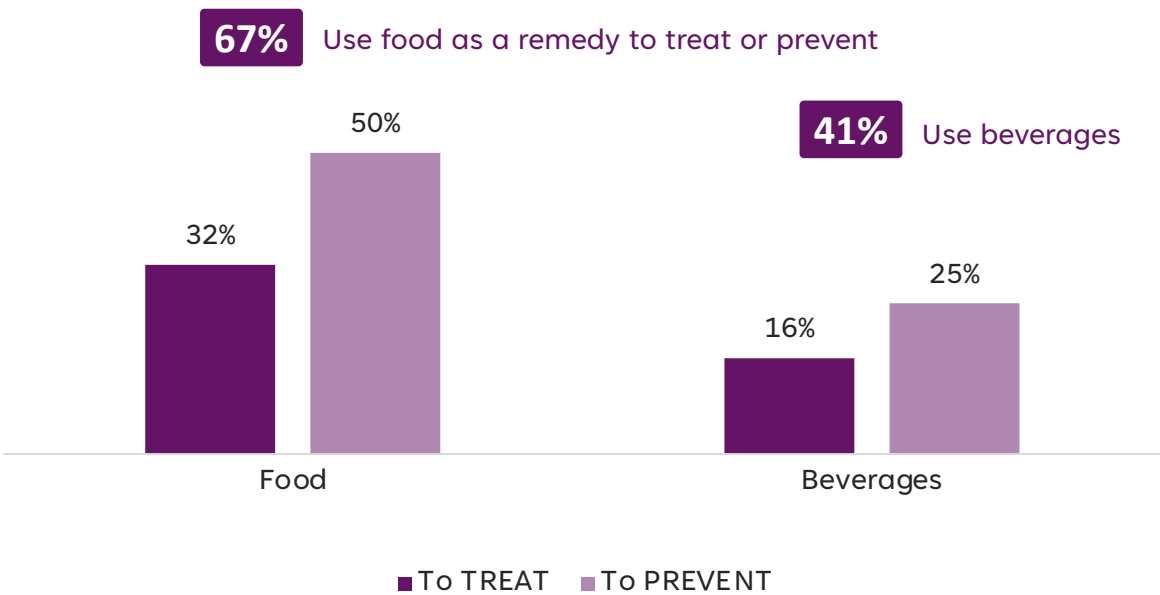
- **The Core** are the most deeply involved in health and wellness.
- **Inner Mid-Level** (IML) consumers share some Core attitudes but adopt behaviors pragmatically with lower consistency and intensity.
- Those in the **Outer Mid-Level** (OML) experiment with health and wellness, and they often choose products and services that “everyone else is using.”
- **Periphery** consumers are the least involved in health and wellness. They share some health and wellness aspirations, but their top priorities are in other areas.



Food and beverages are key to preventing a wide range of conditions

Consume Remedies Used to Address Health Conditions

Among those preventing, treating, or supporting a condition



*I was recently diagnosed with an autoimmune disease, so I'm trying to focus more on actual nutrition: the macros and micronutrients as opposed to previous criteria of "is it vegan, is it *relatively* low in sugar, does it taste good?"*

– April, F, Gen X, IML

While consumers use food and beverage as a form of both treatment and prevention, these remedies lean strongly toward prevention.

Food and beverages are used to help manage conditions such as diabetes and food allergies more so than other modalities. Additional areas such as immunity and weight are often addressed using food and beverage.

Conditions Most Commonly Managed by Each Remedy

(Among those preventing, treating, or supporting each condition)

Foods		Beverages	
Diabetes	56%	Energy	50%
Digestion	54%	Diabetes	28%
Energy	53%	Digestion	26%
Overweight	53%	Healthy aging	26%
Digestive irregularity	51%	Overweight	24%
Food allergy / sensitivity	46%	Physical fitness	24%
High cholesterol	43%	Immunity	23%
Healthy aging	42%	Fatigue	23%
Immunity	41%	Mental performance	21%
Heart / cardiovascular	41%	Skin health	20%

I put ginger in my tea in the morning. It helps with anxiety. It's also good for the digestion tract. I tend to get nausea really easily, so it helps with that as well.

– Sanyu, F, Gen Z, IML

Health & Wellness 2023. A9. Which remedies are you using in your household to treat or prevent each of these health conditions? (For each health condition, check all the remedies that apply) Base: Total n=2175, Those treating/preventing varies by condition n=292-414

Despite having specific parameters for food choices, many feel there is room for occasional indulgence



50%

of consumers consider indulgent foods and beverages to be an important part of a healthy, balanced diet

Gen Z – 56% Millennials – 61%

Gen X – 46% Boomers – 39%

Consumers continue to adhere to traditional views that some flexibility is important to ensure that they don't "rebel" against an overly strict approach by bingeing or abandoning a diet altogether. But in addition to this, the idea of indulgence as a mechanism to support mental and emotional wellbeing is rapidly becoming mainstream, with nearly a third of consumers subscribing to this belief.

I compromise my health in as much as I do like to drink beer, probably a bit too much, but that's me compromising myself rather than compromise by circumstances.

– Matthew, M, Boomer, Core

I won't deny myself something, a treat that looks really good. And one example is yogurt. I like Ellenos yogurt. It might be a little bit more expensive; it might have a little bit more sugar. But the packaging is simple, I think it's local, and it's very satisfying. So I don't think I'm perfect, but I strive to be balanced and get a combination of things.

– Judson, M, Gen X, IML

I'm not going to tell you that everything I eat is perfectly healthy for me. I'm going to eat chocolate sometimes, or cookies, just because they taste good.

– Sara, F, Boomer, OML

Indulgence is seen as a positive by many

31%

consider indulging in food / beverages to be important for their mental health

Contexts for indulgence are varied

33%

indulge in food / beverages when feeling good about themselves

31%

indulge when they feel down

Indulgent items can be unhealthy or better-for-you versions

33%

indulge by choosing less nutritious or junk food / beverage options

31%

seek indulgences with functional benefit (e.g., good for digestion, added vitamin C)

And yet the relationship with indulgence remains complicated

37%

feel guilty when they indulge in foods / beverages too often

Health & Wellness 2023. A12. Thinking about your own health and wellness, indicate how much you agree or disagree with each statement. (Showing Strongly + Somewhat agree) Base: Total n=2175; A13. When you think about "indulging," how well do the statements below describe you? Base: Total n=2175

Tracking health metrics offers three tiers of benefits: information, motivation, and accountability

At the most basic level, *measure* approaches provide consumers with **information** about their health and the activities they are doing to support it. This information provides the basis for a sense of **motivation** to set and pursue goals in terms of activity levels, diet, or mental wellbeing. And finally, this motivation is underscored by a sense of **accountability** that measurement provides. This might be personal, with consumers monitoring their own progress and feeling a sense of internal responsibility that comes from seeing these measurements change over time. There may also be a social component to this accountability, with many modern trackers and apps enabling consumers to share their progress with others.

ACCOUNTABILITY



*I do find it useful to step on the scale each day because it **keeps me in check**. I'm not as concerned with the actual number as much as not going higher. It keeps me from overeating. Just the **accountability piece** of it.*

– Selena, F, Gen X, Core

MOTIVATION



*The Apple Watch helps me track my steps and **reach my daily goals**. It announces when I reach a mile walking or hiking. It's a great tool as it **motivates me to get in my steps**. I've been doing well over 10,000 steps and average is about 16-17,000 per day. This is great and it tracks my progress.*

– Mike, M, Gen X, OML

INFORMATION



*We wouldn't drive a car without looking at **our dashboard to see how much fuel, oil, our speed, etc.**, and I think it is so helpful to have a device / wearable that can show us **insights for our own bodies**.*

– Judson, M, Gen X, IML