

UNDERSTANDING THE
CATALYSTS DRIVING THE
CONSUMER DEMAND
FUELING THE GLOBAL
HEALTH & WELLNESS
MARKET GROWTH

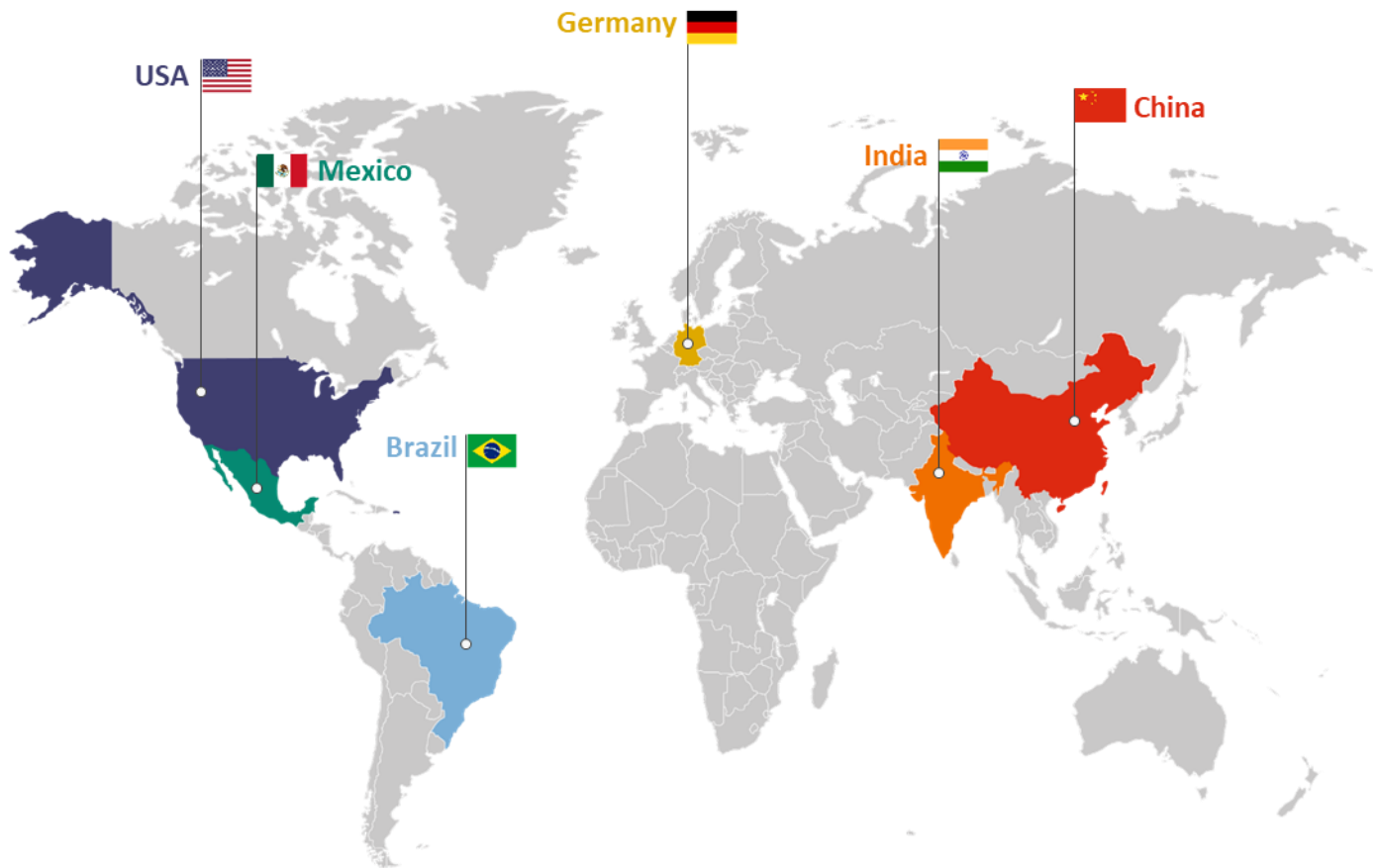


HEALTH & WELLNESS ACROSS THE GLOBE REPORT

IN-DEPTH ANALYSIS AND ROBUST INSIGHTS
BACKED BY A RANGE OF DATA ON SOME OF
THE MOST IMPORTANT HEALTH ISSUES OF
TODAY

JULY 2021

STUDY BACKGROUND



The Hartman Group's study *Health & Wellness Across the Globe* represents a look at this important topic beyond the United States. This study was conducted in a total of six countries:

-  USA
-  Brazil
-  China
-  Germany
-  India
-  Mexico

Many of the key health & wellness questions from The Hartman Group's long-running U.S.-based Health & Wellness study are included as well as other topics such as sustainability and meal habits to broaden the investigation.

In addition to this global perspective, The Hartman Group's tracking study *Health & Wellness 2021* was conducted in the US in the first quarter. That study provides an in-depth update on key measures and trends beyond those included here. It also highlights essential health & wellness concerns within the context of the COVID-19 pandemic.

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QUANTITATIVE METHODOLOGY: AN ONLINE HEALTH & WELLNESS SURVEY

Quantitative Methodology: An online survey fielded mid-March to mid-April 2021 of 4,528 adults across six countries: USA, Brazil, China, Germany, India and Mexico. Samples by country balanced by age, gender and the survey translated into appropriate language for each country.

Note on Cultural Differences and Survey Responses: *When responding to surveys, consumers in each country interpret scales differently. Because of this, comparing the data presented in this report across countries is not advised.*

REPORT INCLUDES

- The report (PowerPoint and PDF format) includes executive summary, robust insights and implications, and a complete analysis of relevant data supported by full-color charts and visuals.
- A supplemental set of data tables (Excel format) with a breakdown of key demographics will accompany the report.

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REPORT OVERVIEW

Chapter 1. Executive Summary

Despite cultural differences around the world, consumers display many similarities in approaches and attitudes to health & wellness, particularly during a global event such as the COVID-19 pandemic has brought shared immediate priorities to the fore.

Chapter 2. Health & Wellness Across the Globe

Consumer understandings of health & wellness around the world are shaped by cultural forces that can vary by country. Exploration of the following topics highlights how consumers across the globe converge and diverge in their thinking about health, including their own health status, aspirations and behaviors.

- Meaning of health & wellness
- Attitudes around health & wellness and related topics (eating, sustainability and outlook for the future)
- Health conditions and management modalities
- Health & wellness practices
- Barriers to staying healthy

Chapter 3. Health & Wellness in a Global Pandemic

Living in the midst of a global pandemic has affected how consumers perceive health & wellness—both in general and in terms of the health of themselves and their loved ones. This section tracks how a year of pandemic has changed consumers' health priorities and practices.

- Perceived changes in views toward health & wellness due to COVID-19
- Reasons for changing views
- Improvement/decline in health in the past year
- Ways in which views on health & wellness changed in the past year
- Reasons for changes in health & wellness views
- Factors that made it *easier* to eat a healthy diet in past year
- Factors that made it *harder* to eat a healthy diet in past year
- Changes in restaurant visitation frequency in past year

Chapter 4. Consumer Engagement in Health & Wellness

The Hartman Group applied its long-standing expertise in analyzing consumer culture, attitudes and behaviors to develop a segmentation that can be used to understand engagement in health & wellness in countries around the world.

- Analysis of global consumers by engagement with health & wellness results in three distinct segments: Engaged, Aspiring, Indifferent
- Comparison of wellness segment demographics across countries

- How optimistic consumers across the countries are about the future
- Comparison of health & wellness segments of products/services usage across the countries (supplements/herbs, app/fitness monitor, regular exercise, take steps to monitor mental health)
- Behavior by health & wellness segment when choosing food and beverages: “I look for food and beverages labeled organic/certified Non-GMO,” “I always/usually buy sustainable food and beverages”
- Health & wellness segments key sustainability attitudes

Chapter 5. Global Approaches to Diet and Meals

How and what consumers eat is highly variable around the world, depending on cultural factors. To gain a global perspective, this section looks at dietary approaches and preferences, meal aspirations and the perception and use of restaurants.

- Comparison of eating styles across the countries (omnivore, carnivore, selective meat eater, flexitarian, pescatarian, vegetarian, vegan)
- Comparison of past 12-months approaches to eating that were tried (low-carb, dairy-free, intermittent fasting, weight loss program, Ketogenic or Bulletproof diet, gluten-free, Paleo diet, none of the above)
- Key health & wellness priorities when choosing food and beverages
- Ingredients adding/increasing to improve health (e.g., fiber, vitamin D, protein)
- Ingredients avoiding/reducing
- Comparing current meals to ideal: nutritious meals, healthy/balanced meals, meals planned in advance, fruits & vegetables, fresh foods, meat, packaged/processed foods
- Types of restaurants visited in past 3 months
- Views on eating healthy at food service
- Comparing self to average household when it comes to food/comparing current meals to ideal

Chapter 6. International Perspectives on Sustainability

Beliefs about the immediacy of environmental concerns combine with cultural variations to create a patchwork of attitudes and behaviors related to sustainability around the world. This final section provides a snapshot of consumers' outlook for the future and their perceptions of how best to effect change related to sustainability as well as their beliefs and habits around sustainable purchasing.

- How optimistic consumers across the countries are about the future
- Greatest impact on society: purchase decisions, voting decisions, community involvement
- Frequency of grocery choices based on sustainability concerns/primary reason for purchasing sustainable products
- Most important benefits and barriers to purchasing sustainably

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