



HEALTH & WELLNESS: The Great Wellness Reset 2023



A Hartman Group Syndicated Research Report

**Published: March 2023
Market Coverage: U.S. Market**



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Health and Wellness 2023, The Great Wellness Reset includes the latest findings from The Hartman Group's long running consumer-centric study of the U.S. wellness marketplace. The study explores long-term and more immediate trends that are shaping how consumers are approaching and personalizing health and wellness. This Great Wellness Reset highlights areas of opportunity to help consumers along their wellness journey.

Hartman Group Syndicated Report Published: March 2023 | Report length: 107 pages | Market coverage: U.S. Market

Grounded in primary quantitative and qualitative research, the report offers a comprehensive consumer-centered perspective on health and wellness today including consumer priorities and approaches to support their mental, physical and social wellness

What's Included?

- Executive summary
- General report (PowerPoint and PDF)
- Demographic data tables (Excel)

Explore the Report

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Methodology

- Integrated qualitative and quantitative methodologies.
- **Quantitative:** Online national survey January 23, 2023–February 5, 2023, n=2,175 U.S. adults aged 18–77 (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.
- **Qualitative:** Digital Ethnographies: N=16 participants. Week-long immersive engagement via asynchronous virtual platform.
- **Qualitative:** Follow-up In-depth Interviews, N=7 participants. Hour-long interview focused on delving deeper into responses from the digital ethnography.



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Executive Summary

Chapter One: The Great Wellness Reset

Emerging from the COVID-19 pandemic, yet faced with economic uncertainty, the current crossroads can be characterized as the Great Wellness Reset.

- Four key trends driving health and wellness today (analysis)
- Three interacting and overlapping health and wellness elements (analysis, model)
- Health and wellness dimensions (chart, trended data, analysis)
- Areas of wellness actively supporting (chart, analysis)
- Areas most urgently needed to get better (chart, analysis)
- Barriers to being healthy (chart, analysis)

Chapter Two: The World of 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 and determine their engagement with health and wellness.

- The World of Health and Wellness (model)
- Demographics by segment (chart)
- Key behaviors and attitudes distinguishing segments (chart)
- Trusted information sources (chart)
- General purchase and diet criteria (chart)
- Production criteria (chart)
- Segment profiles—Core, Inner Mid-level, Outer Mid-level, Periphery (dashboards)



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Chapter Three: Addressing Health and Wellness

- Personal health assessment relative to all US adults (chart, analysis)
- Change in health and wellness from year prior (chart, analysis)
- Reasons for change in health and wellness views (chart, analysis)
- Health and wellness changes due to COVID-19 (chart, analysis)
- Conditions currently preventing or treating (chart, analysis)
- Change in mental health from year prior (chart, analysis)
- Impacts on mental health (chart, analysis)
- Four approaches used to support health and wellness (model)
- Tactics regularly used to take care of health and wellness (chart, trended data, analysis)
- Products and practices most likely to give up due to inflation (chart, analysis)
- Impact of rising food cost on healthy purchases (chart, analysis)
- Behaviors and attitudes around diets and food prices (chart, analysis)

Deep Dive: Addressing Health and Wellness—Consume

- Consume* tactics regularly used to take care of health and wellness (chart, trended data, analysis)
- Key trends driving change in *Consume* approaches to health and wellness (analysis)
- Consume* remedies used to address health conditions (chart)
- Willingness to pay for food/beverage attributes (chart, analysis)
- Attributes sought in food and beverage (chart, analysis)
- Ingredients avoided/added in diet (chart, analysis)
- Specific eating approaches tried in past year (chart, analysis)
- Consumer barriers to eating healthy (analysis)
- Entity responsible for ensuring food is healthy (chart, analysis)
- Channels shopped in past month—grocery vs. health and wellness (chart, analysis)
- Views on eating healthy at food service (chart, analysis)
- What restaurants can do to support health and wellness (chart, analysis)



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Chapter Three: Addressing Health and Wellness (continued)

Deep Dive: Addressing Health and Wellness—Treat

Treat tactics regularly used to take care of health and wellness (chart, trended data, analysis)

Key trends driving change in *Treat* approaches to health and wellness (analysis)

Treat remedies used to address health conditions (chart)

Vitamins, minerals and supplements taken in past 12 months (chart, analysis)

VMHS adoption pathway (analysis)

VMHS barriers to use (chart, analysis)

Medicine vs. diet/lifestyle change to manage conditions (chart, analysis)

Attitudes/perceptions about healthcare system (chart, analysis)

Deep Dive: Addressing Health and Wellness—Act

Act tactics regularly used to take care of health and wellness (chart, trended data, analysis)

Key trends driving change in *Act* approaches to health and wellness (analysis)

Act remedies used to address health conditions (chart)

Change in physical health from year prior (chart, analysis)

Exercise types used regularly (chart, analysis)

Consumer use of activities to support mental/physical health (analysis)

Consumer barriers to achieving their goals (analysis)

Deep Dive: Addressing Health and Wellness—Measure

Measure tactics regularly used to take care of health and wellness (chart, trended data, analysis)

Key trends driving change in *Measure* approaches to health and wellness (analysis)

Types of health and wellness devices used (chart, analysis)

Pain points in *Measure* tactics (analysis)

Chapter Four: Implications and Recommendations

Layering The Hartman Group's deep cultural understanding of the health and wellness space with data uncovered in the study to provide specific, actionable recommendations for H&W-focused products, companies and brands.

*Additional insights about pet owners and H&W engagement for themselves and their pets available via **Health and Wellness 2023: Pets & Health.***



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ABOUT THE HARTMAN GROUP

The Hartman Group is the premier food and beverage consultancy. Our mission is to translate consumer behavior and food culture into strategic growth opportunities for our clients.

Since 1989, The Hartman Group's anthropologists, social scientists and business analysts have been immersed in the study of American food and beverage culture, using ethnographic observation, quantitative tracking surveys and deep study of trends. What we have learned and continue to uncover allows us to upend many notions of our traditional American eating and drinking patterns, thereby identifying unique opportunities and winning strategies for our clients.

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