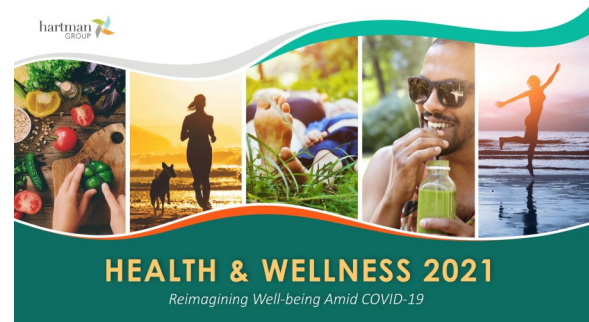


Health & Wellness: Reimagining Well-being Amid COVID-19

Hartman Group Syndicated Research Report Published: March 31, 2021 | Report length: 117 | Market coverage: U.S. Market

The Hartman Group has tracked consumer attitudes, behaviors, aspirations, and challenges around health and wellness for over two decades. **Health & Wellness 2021: Reimagining Well-being Amid COVID-19** updates Hartman's perspective on the American health and wellness landscape in the wake of the pandemic and delivers insights into how consumers envision and enact health and wellness in our new normal.



This report examines consumers' current health and wellness goals and priorities, the approaches they use to address them, and the ways they learn about and source health and wellness solutions.

Spotlights include:

- **key benefit areas of immunity, mental well-being, weight management, and nutrition**
- **plant-based eating and other approaches**
- **the role of household composition**
- **a lens on socioeconomic status**

Methodology

- Integrated qualitative and quantitative methodologies
- Quantitative: A nationally representative online survey of n=2,347 U.S. adults (aged 18–75), primary shoppers, conducted Jan. 29-Feb. 10, 2021. Results weighted to U.S. Census balance for age, gender, income, census division, and presence of children in household.
- Mobile Qualitative: 5-day asynchronous task assignment via specialized mobile app. All tasks were completed remotely due to COVID-19, and no participants were asked to visit a store or public area for safety reasons.
- Virtual Interviews: Consumers participated in 1-hour virtual interviews to contextualize assignment uploads and dig deeper into key topic areas.

Report Includes:

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

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Report Overview

Americans' approach to health and wellness in 2021 reflects both longer-term trends and pandemic priorities.

The Hartman Group's Health & Wellness (H&W) syndicated research series has been tracking consumer attitudes, behaviors, aspirations, and challenges around health and wellness over two decades, most recently in 2019. Several long-term shifts have been reshaping the American H&W landscape over this time frame.

- Human understanding of what it means to be healthy and well has always been evolving as new scientific facts and societal orientation emerge.
- An increased grasp of the interconnectedness of different parts of the body and of different aspects of modern life has deepened focus on holistic wellness, including mental health.
- New technologies have enabled new ways of tracking health statistics and supporting one's health with increasingly personalized solutions.

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- **Implications and Recommendations**

On the following pages is a detailed look at the contents of each chapter inside the Health & Wellness 2021: Reimagining Well-being Amid COVID-19 syndicated research report.

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Executive Summary: Topline Observations

- After a year of disruption to Americans' lives at societal and household levels, consumers are more attuned to the importance of resilience and healing in the face of change
- H&W experiences during the pandemic have been highly uneven across the population
- COVID-19 has exposed and exacerbated fragmentation in Americans' paths to well-being
- The past year has highlighted specific aspects of health as well as the need for balance across different areas of health
- The roles of various health solutions have remained consistent, but consumers' ability to implement them has changed
- Sourcing of H&W solutions has undergone dramatic and likely lasting change

Chapter 1. Health & Wellness in the U.S.: Cultural Shifts and the COVID-19 Pandemic

- Gradual cultural shifts, global and domestic crises, and the momentum of social and environmental movements shape the American H&W landscape today
- Life changes experienced by consumers over the past year (chart)
- How consumer views of health and wellness have shifted
- Health & Wellness Dimensions (chart)
- In 2021, complementary dimensions of health and wellness are increasingly intertwined and inextricable
- Consumer shifts in wellness behaviors in response to the COVID-19 pandemic
- Health & Wellness (timeline): The Nineties to Now
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Chapter 2. The World of Health & Wellness: The Role of Consumer Engagement

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- Demographics of Health & Wellness (by H&W segment) (chart)
- Key attitudes distinguishing H&W segments (chart)
- Mainstream purchase criteria vs. purchase criteria distinguishing the Core (charts)

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- Tactics regularly used to take care of H&W (chart)
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- As consumer concerns around holistic health meet with the impacts of COVID-19, key aspects of physical and mental resilience gain prominence
- Long viewed as foundational to health and wellness, immunity remains in the spotlight in 2021
- H&W Segments: Related but distinct notions of immunity (chart)
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- Treating or preventing in my household... vs. Compared to a year ago, my MENTAL HEALTH is now... (chart)
- Consumer awareness is growing and illuminating key components of mental health and wellness

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- Mental health-supporting tactics regularly used for health and wellness (chart)
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- Past-year CBD/THC product use in legal states / Benefits sought from CBD/THC use (charts)
- Chapter Summary: Priorities Emerging Amid COVID-19

Chapter 4. Perennial Needs Amid COVID-19: Spotlight on Physical Fitness and Nutrition

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- Physical fitness and weight management remain highly salient and relate to additional H&W concerns, like pain
- Exercise as a tool for health and wellness (chart)
- Managing weight is important to many as they confront new obstacles and opportunities
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- Increased cooking during the COVID-19 pandemic has been a H&W tactic, but it is also an avenue for engagement with ingredients and preparation lasting beyond "burnout"
- I look for food and beverages... (chart)
- Ingredients adding/increasing in diet (chart)
- Ingredients avoiding/decreasing in diet (chart)
- Sugar continues to be a key area of concern across all dimensions of health and wellness
- Tactics for managing sugar concerns range from category swaps to sweetener exploration
- Purposeful indulgence can be part of health and wellness
- Specific eating approaches tried in the past year (chart)
- Emergence of processed foods labeled for carbohydrate-conscious diets is fueling a consumer critique and diluting the power and long-term viability of dietary claims
- Consumers are drawn to a "plant-based" approach as it aligns with key ideas in modern Health & Wellness

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- With half of consumers seeking “plant-based” as an attribute, the movement has clearly gone mainstream—but it’s another label seeing dilution of meaning
- As popular plant-based categories gain mainstream momentum, emerging offerings appeal to a more holistic set of H&W aspirations and needs
- Interest in animal-free alternatives hasn’t changed the cultural ambivalence toward soy
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- Triggers for change in views of health and wellness (chart)
- Parents and single-person households are actively exploring adjustments to their diet but face distinct trade-offs—leaving older, adult-only households most engaged with cooking
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- Information sources where consumers learn about health & wellness (chart)
- The events of 2020 are unlikely to shift consumer notions of how government and health care systems fall short—and how industry wields its influence
- Information sourcing has itself become a fraught exercise, reinforcing the need for curation

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- Social media can play a positive role in supporting health and wellness as platforms for inclusive content
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- Innovation from more conventional retailers underscores the importance of H&W credentials and the growing competition for H&W spending
- Restaurant use (chart)
- Motivations for using food service (chart)
- Plant-based eating at food service is easier than ever, from meatless burgers at QSR to cuisines with plant-centric expertise
- For consumers, sourcing of health & wellness at food service has been contingent upon the transportability of menu items and perceived freshness at time of consumption
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Implications and Recommendations

- Innovating in an increasingly holistic H&W landscape
- Navigating consumer aspirations and approaches at the intersection of health and food
- Designing for American households' health needs, behaviors, and barriers
- Providing H&W information, inspiration, and solutions
- Expanding access to H&W solutions across socioeconomic status

A VALUED RESOURCE

This report is a continuation of The Hartman Group's series of syndicated research reports in the intersecting market spaces of health & wellness, sustainability, and organic & natural.

From our trademark integration of rich qualitative and robust quantitative research methodologies to expert analysis, The Hartman Group offers our clients an unparalleled understanding of consumers, culture, trends, and categories as the foundation for confident, informed decision-making, inspiration and identifying opportunities for growth. Each report provides in-depth analysis and thought-provoking insight backed by a range of data.

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