Future of Wellness

A Thought Leadership POV

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HEALTHLINE MEDIA

The *future of wellness* is bright, for all

We surveyed a diverse group of 2,102 Americans to understand the evolving state of wellness today and what's shaping the future.*

Today, the vast majority of people are optimistic and excited about health and wellness technologies and innovations, and recognize their potential in their lives.

A lot of people are already using wellness products, and those who try them tend to be highly enthusiastic about their experience. Consumers recognize that these technologies can improve their physical and mental health, and help them reach their wellness goals. Our survey also revealed today's most popular wellness solutions, and what people are most excited about using in the future.

But we can go further together. There is growth ahead of us. Our data suggests that demographic factors like race, income level, location, and age correspond to gaps where interest in wellness technologies exceeds adoption. These gaps indicate strong areas of opportunity for innovators and brands to connect with people who are genuinely interested in their technologies.

The insights in this report make it clear: consumers want to engage with health and wellness innovation at a wider and deeper scale than many of us knew. Dive in to learn what consumers are looking for from brands today, and how we can all play a role in connecting with broader audiences and changing the narrative to ensure the future of wellness belongs to everyone.

**For more details about the research, including a breakdown of the demographic groups, see the last page of this report.*

People Feel Optimistic About *Wellness Innovation*

The future of wellness is bright. Nearly everyone sees the potential in wellness innovations, and when people use these technologies, they rate their experiences highly.

Improve

91%

say innovations could improve people's quality of life

Connect

91%

say innovations could illuminate connections between wellness, bodies, and minds

Inspire

79%

are inspired by the latest wellness tech research

Live Well

77%

feel health innovations fit in well with their lifestyle

Those who have tried wellness technologies rate their experiences as overwhelmingly positive (94-95%) across nutrition, fitness, sleep, and mental health.

Among those who have tried the products, the highest "extremely positive" rankings include:

71% SMART SCALES

62% HEALTH TRACKERS

61% CONTINUOUS GLUCOSE MONITORS

Nutrition

75% SMART ALARM CLOCKS

62% MATTRESS COOLING TECH

59% SMART BEDS, SMART JEWELRY, AMBIENT NOISE MACHINES

Sleep

73% FITNESS TRACKERS

63% PORTABLE WEIGHT MACHINES

61% NEUROPRIMING HEADPHONES

Fitness

72% LIGHT THERAPY

60% DIGITAL SYMPTOM TRACKING AND JOURNALING APPS

59% VIRTUAL REALITY

Mental Health

Top Technologies People Use Today — and Tomorrow's Most *Exciting Solutions*

Across key wellness categories of nutrition, fitness, sleep, and mental health, these are the standout innovations today — and tomorrow's upcoming products.

What people are using *today*

Fastest to adopt

Nutrition (27%)

Mental Health (18%)

Slowest to adopt

Most-adopted technology

Fitness trackers (50%)

What people are excited about *next*

Top *category*

34%

NUTRITION AND SLEEP

Top *technologies*

54%

MATTRESS COOLING TECHNOLOGIES

47%

SMART BEDS

Top benefits for technologies: Improving physical health and mental health, tracking progress toward goals, improving motivation, and boosting consistency

The following tables show today's most-used* innovations by wellness category, the technologies people are most interested in for the future, and the average interest in each wellness category.

Usage of *Nutrition Technologies*

	Total Respondents
Health trackers	**40%**
Meal delivery apps	**35%**
Smart scales	**26%**
Meal planning apps	**26%**
Category Average	**27%**

Interest in *Nutrition Technologies*

	Total Respondents
Smart scales	**40%**
Meal planning apps	**37%**
Smart mirrors	**36%**
Health trackers	**36%**
Category Average	**34%**

Usage of *Fitness Technologies*

	Total Respondents
Fitness trackers	**50%**
Compression socks	**38%**
Recovery massage balls and guns	**23%**
Virtual reality courses	**18%**
Category Average	**23%**

Interest in *Fitness Technologies*

	Total Respondents
Recovery massage balls and guns	**35%**
Virtual reality courses	**32%**
Portable weight machines	**30%**
Neuropriming headphones	**25%**
Category Average	**28%**

Usage of *Sleep Technologies*

	Total Respondents
Ambient noise machines	**29%**
Mouthguards	**27%**
Smart alarm clocks	**23%**
Continuous positive airway pressure (CPAP) machines	**23%**
Category Average	**22%**

Interest in *Sleep Technologies*

	Total Respondents
Mattress cooling technology	**54%**
Smart beds	**47%**
Ambient noise machines	**34%**
Smart alarm clocks	**33%**
Category Average	**34%**

Usage of *Mental Health Technologies*

	Total Respondents
Mental health apps	**27%**
Digital symptom tracking and journaling apps	**19%**
Light therapy	**18%**
Smartphone assisted therapy	**18%**
Category Average	**18%**

Interest in *Mental Health Technologies*

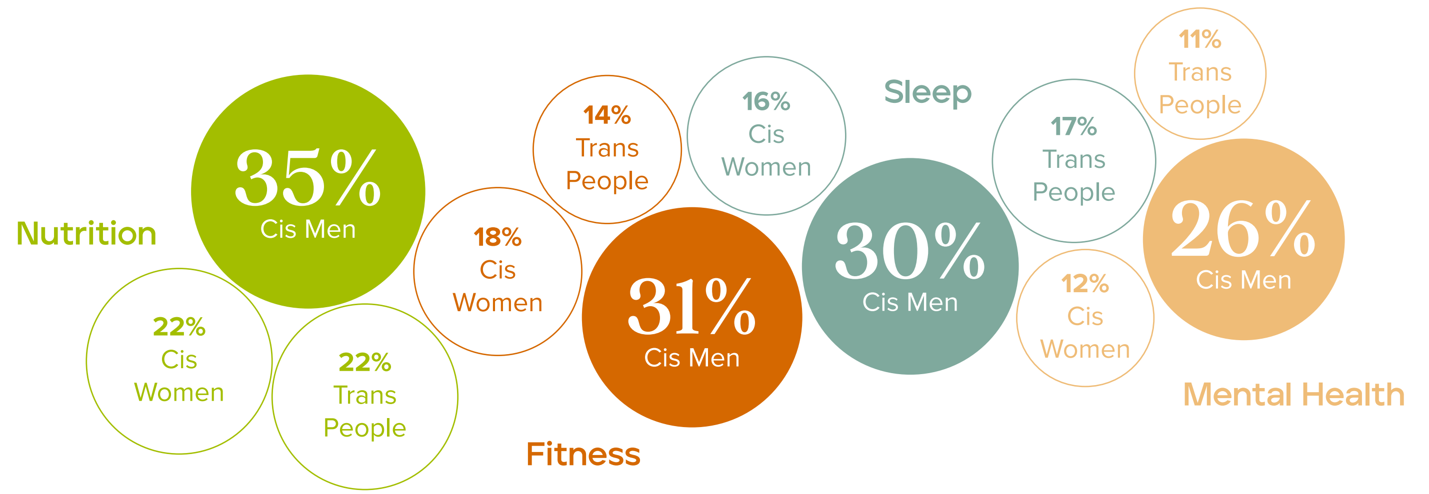
	Total Respondents
Light therapy	**31%**
Mental health apps	**31%**
Smartphone assisted therapy	**30%**
Virtual reality for mental health	**30%**
Category Average	**27%**

**Usage and adoption defined as "previously used" or "currently used" throughout the report*

Wellness Across *Genders*

Across categories, cisgender men are more likely users of today's technologies. But there is a larger potential audience in cisgender women and trans people who have not tried these innovations, despite their interest.

Current use: Today, men *use* more wellness products in every category



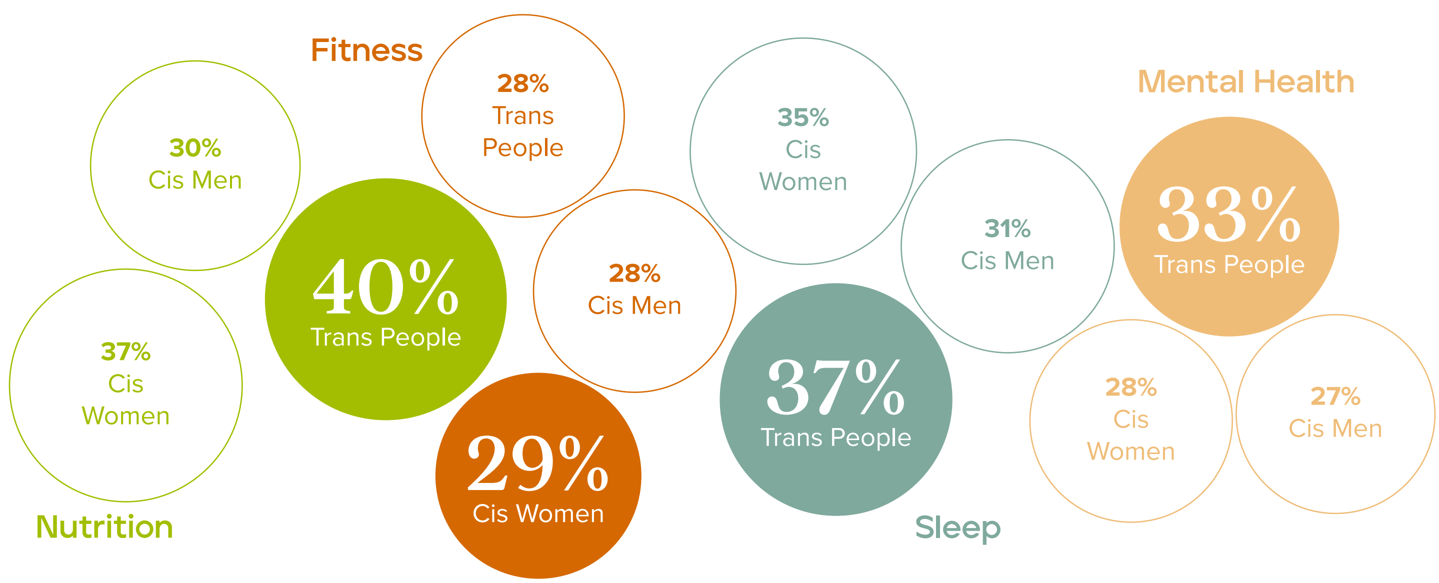
Technologies cis men are more likely to use than cis women:

2.6x
PRESCRIPTION VIDEO GAMES

2.6x
BLOOD FLOW RESTRICTION (BFR) TRAINING

2.4x
SMART MIRRORS

Potential audience: Women and trans people are more likely to be *interested in* wellness innovations, but have not tried them yet



Technologies cis women are more likely to have interest in than cis men:

17%
VIRTUAL REALITY COURSES

15%
SMART MIRRORS

7%
PORTABLE WEIGHT MACHINES

Why *Wellness Technologies* Are Popular

From physical health to interpersonal connection, wellness innovations offer consumers a range of benefits — while some benefits resonate more with certain groups.

Physical Health

57% I can improve my physical health
▲ BOOMERS, 64%

40% I can prevent future health problems
▲ BOOMERS, 47%

38% I can learn more about my body and health
▲ BLACK RESPONDENTS, 42%

32% I can understand how different aspects of my health — like nutrition and sleep — are related

18% I can avoid visiting the doctor
▲ GEN Z, 24%

Time and Organization

47% I can track progress toward my goals

46% It helps me be more consistent

41% I can work on goals on my own time
▲ BOOMERS, 48%

29% I can save money
▲ GEN Z, 41%

26% I can save time
▲ GEN Z, 35%

Mental Health

45% I can improve my mental health

44% I can improve my motivation

32% It makes it less stressful to achieve my health goals

▲ LOW-INCOME RESPONDENTS, 37%

Interpersonal Connection

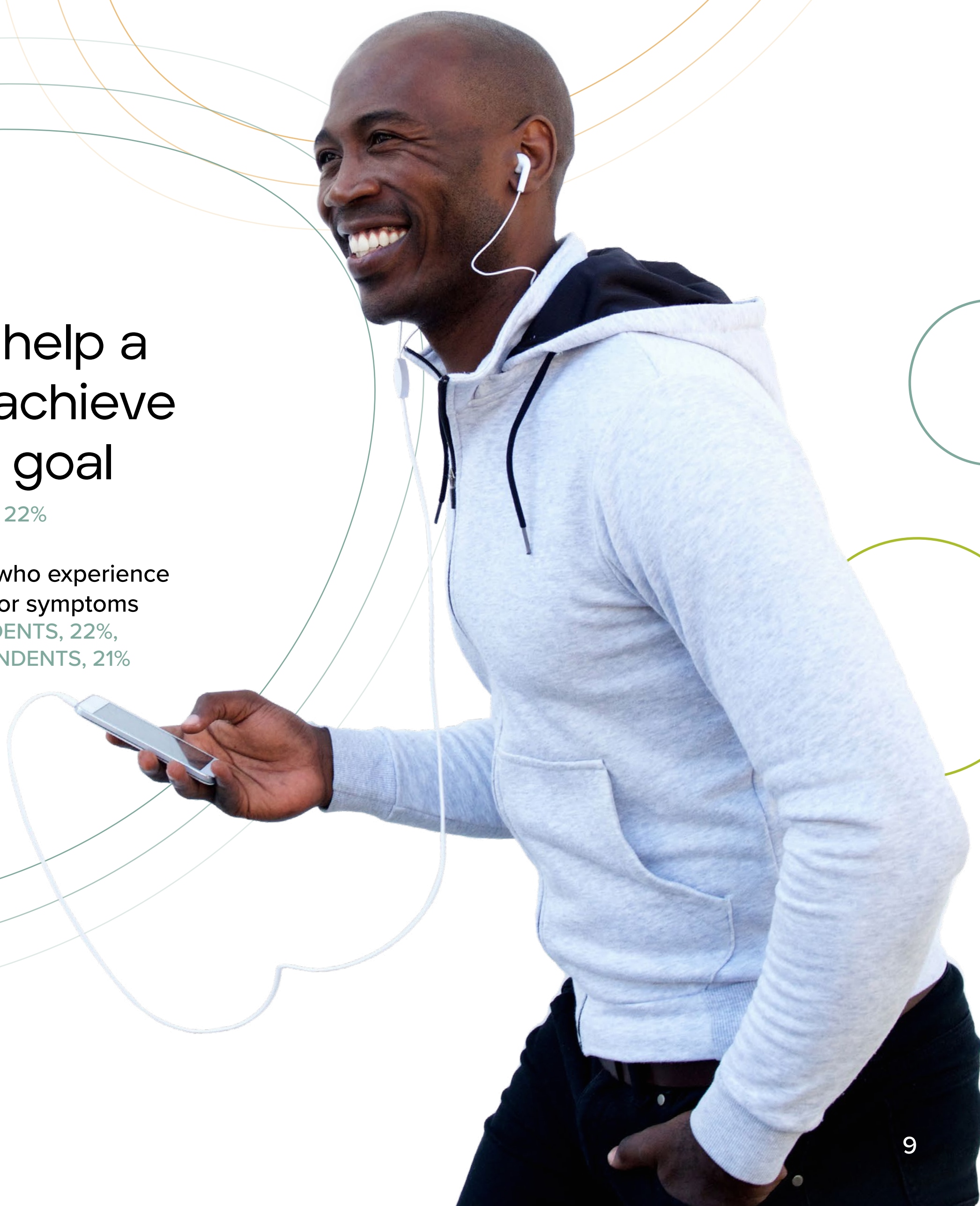
18% I can help a loved one achieve a health goal

▲ PARENTS, 22%

15% I can find people who experience the same condition or symptoms

▲ BLACK RESPONDENTS, 22%,

▲ HISPANIC RESPONDENTS, 21%



Enthusiasm For *Wellness Technologies*

Today's consumers see great potential in wellness innovations as a path toward holistic, sustainable living.

A boost for *holistic living*

About 68% of respondents agree health innovations are essential to living a holistic life, and this sentiment ranks even higher for:

Millennials	76%
Hispanic & Asian	80%
Parents	78%
Non-Parents	61%

A way to act *sustainably*

73% of respondents say health technologies and innovations help them practice sustainability. Respondents in these categories agree:

Millennials & Gen Z	80%
Black, Asian, & Hispanic	80%
White	70%
Parents	82%
Non-Parents	68%

Early adopter excitement

41% of respondents agree that they are always the first one to try new health and wellness technologies and innovations — including:

Gen Z	53%
Millennials	62%
Hispanic	60%

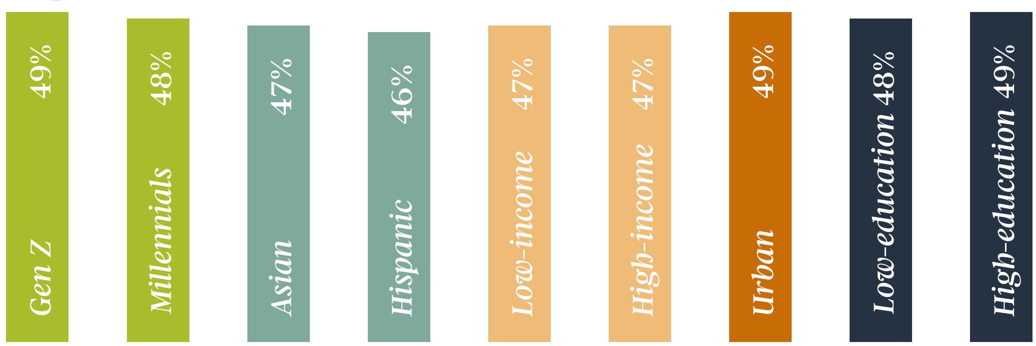
Only 31% of respondents think health technologies and innovations have a negative impact on the environment.

Gaps in Adoption Suggest *Opportunities* Exist

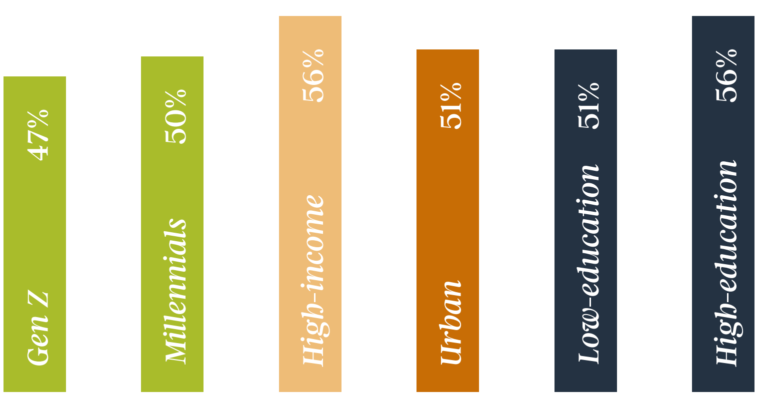
Despite overall positive sentiments about health and wellness innovations, they are not currently reaching everyone they could today. Let's look at what's holding people back, and what we can learn to propel us in the future.

People aren't sure these technologies are *meant for them*:

44% feel that a lot of health innovations are *NOT being designed for them or their needs*. This is higher for:



45% find new health and wellness technologies and innovations *difficult to use*. This is higher for:



Some are missing out on *wellness technologies*

Lower average adoption rates	Higher average adoption rates
Rural	Men
Boomers	Millennials
Low-income	High-income
Less education	More education
People of color (except for nutrition)	Parents

Lower ← ***Average adoption rates*** → ***Higher***

Wellness Gaps suggest *opportunities* in:

Nutrition

Smart mirrors have the largest gap (20%) between interest and adoption.

That gap is especially large among Black (32%), Asian (37%), and medium-income (31%) respondents.

Sleep

Smart beds have the largest gap (31%) between interest and adoption.

That gap is especially large among Black (44%), Asian (36%), Hispanic (31%), Boomers (39%), and low- and medium-income (40%) respondents.

Fitness

Virtual reality courses have the largest gap (14%) between interest and adoption.

That gap is especially large among people of color (33%) and Gen Z (22%).

Mental Health

Virtual reality for mental health has the largest gap (14%) between interest and adoption.

That gap is especially large among Asian (30%), Gen Z (19%) and low- or medium-income (20%) respondents.

#1: Wellness for Cultural Competency

Ensure all races and ethnicities are included. Four in 10 Americans are people of color, as are more than half of young people under 16. To connect with the full potential audience for wellness innovations, embracing diversity must be central to marketing, communications, and content, if you aren't doing this already.

People of color are excited about wellness innovations

Across categories, people of color show interest in wellness innovations at higher rates than white respondents. They also identify as early adopters at higher rates, 52% vs. 36% for white respondents.

However, the gap between adoption and interest is notably wider for these groups, suggesting there is more opportunity in this market.

Across race and ethnic groups, the % gap between interest and adoption is higher in key wellness categories.




	Nutrition	*Fitness*	*Sleep*	*Mental Health*
Black	11%	11%	22%	15%
Asian	7%	9%	20%	18%
Hispanic	3%	10%	12%	13%
White	6%	2%	9%	7%

Pregnant people of color use smartphone apps at high rates — but gaps remain

For most of the app technologies included in the survey, pregnant people of color show the highest usage of any group:

71% have used fitness trackers

66% have used meal delivery apps

56% have used health trackers

53% have used meal planning apps

47% have used mental health apps

87% of pregnant people of color agree, ***I think health innovations fit in well with my lifestyle***, vs. **77%** for all respondents.

Yet their usage rates are lower for most other wellness technologies, and of all historically marginalized groups, pregnant people of color are the most likely to feel that tech isn't designed for them or their needs (49%). This is an opportunity to design and market solutions specifically for this group.

Questions to Ask Yourself & Your Teams

- ☐ Do we reflect the full interests, needs, and experiences of people of color in our content, messaging, and positioning?
- ☐ In what ways can we dig deeper through research and listening to find new opportunities to engage with people of color?

#2 Wellness Within Reach

Bring well-being to more people regardless of income. In public health circles, health has been described as the new wealth. Of course, many innovations are affordable or become more affordable over time. But the association of wellness with status may prevent brands from connecting with the full audience that is excited about their innovations today.

Cost is a barrier to *interest*...

59% say affordability is a strong need from health & wellness brands

69% think health innovations are too expensive

Especially for:

72% LOW-INCOME

73% LOW-EDUCATION

75% RURAL

awareness...

If you make over $100,000 a year, you are up to 300% more likely to have heard of or have interest in fitness technologies than if you make less than $50,000 a year.

...and *adoption*.

Where the data shows high interest but low adoption, the specific wellness technologies tend to sit at a higher price point — suggesting cost is a barrier.

A success and opportunity: *smartphone apps*

95% awareness rates exist for health and fitness trackers, pregnancy trackers, meal planning and delivery apps, and more.

They are the *most popular innovation* on our list, as 50% have used fitness trackers and 40% have used health trackers.

Pregnant people of color show the highest usage across smartphone categories — as high as 71% for fitness trackers.

Marketer Tip

Smartphone apps are a low-cost solution with room to grow. Nearly half of low-income respondents are interested in these technologies, although they have a 26% usage rate currently (vs. 61% for high-income).

Questions to Ask Yourself & Your Teams

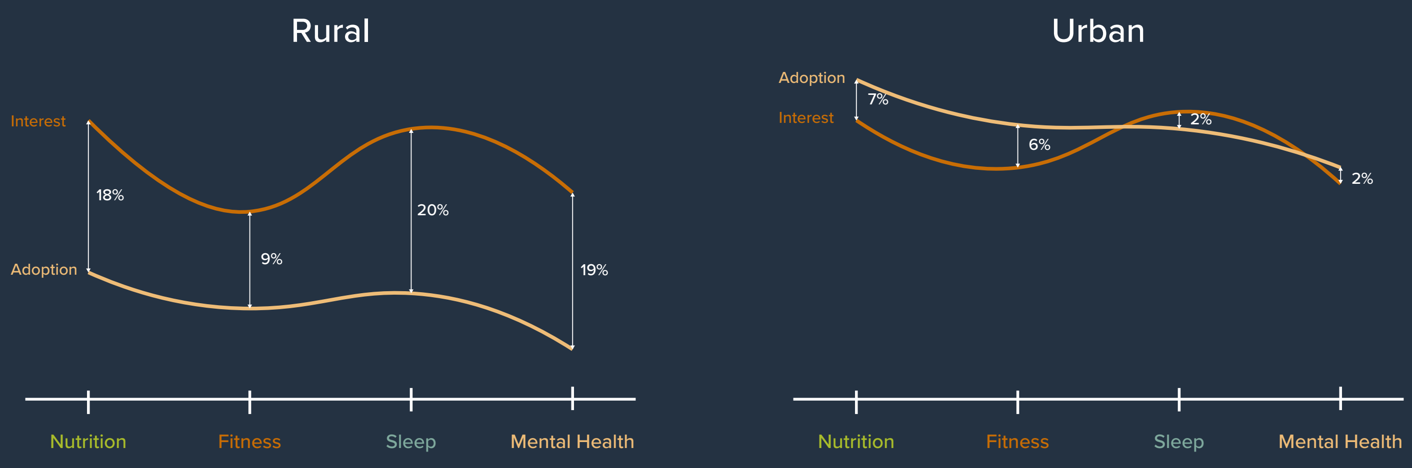
- ☐ Are we providing enough education to audiences about why our products and services are “worth it”?
- ☐ How do we evolve our brand story and message to engage with a wider audience?

#3 Wellness for Everyone, Everywhere

Reach rural audiences, too. Although just 14% of the U.S. population lives in rural counties, a wider definition of wellness includes these communities, too. Rural areas are underserved in many ways, including health and well-being — but they are an eager market for new solutions.

Rural communities are are ready for new innovations

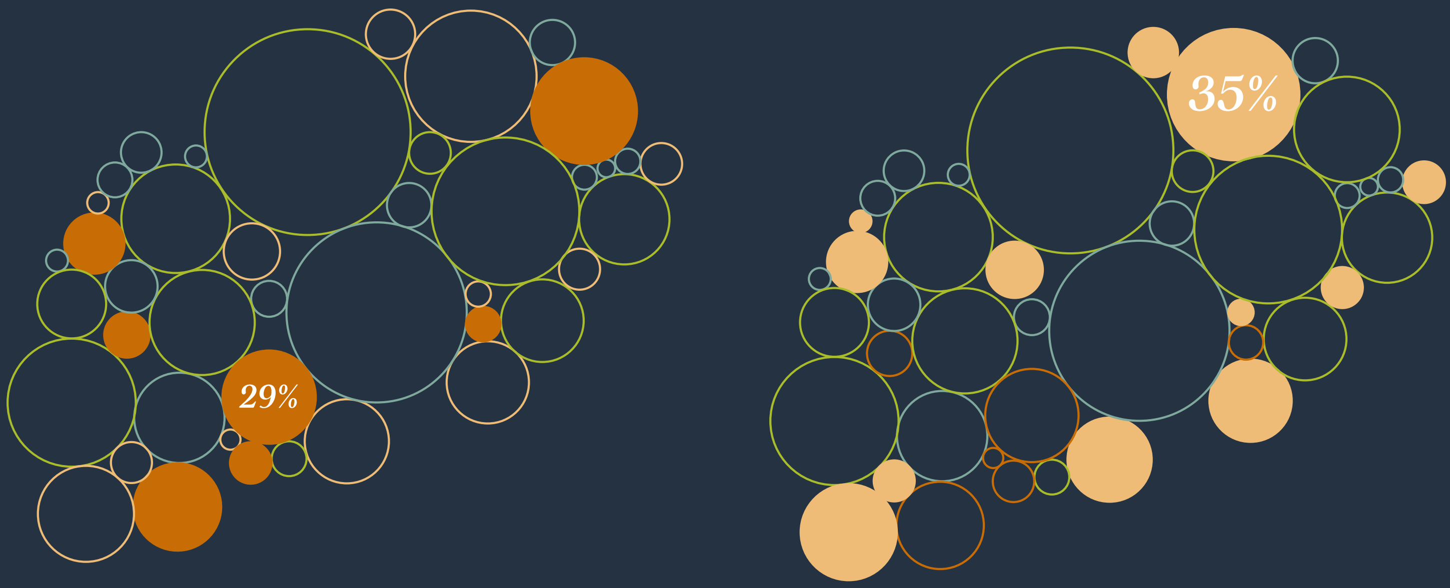
They show similar interest rates as urban populations, yet **21.5%** average lower adoption than urban counterparts — equaling a **16.5%** average gap between adoption and interest. Meanwhile, in urban populations, average adoption actually *exceeds* interest levels.



Rural communities need mental health solutions

Rural communities experience similar rates of mental health issues as in cities. Yet they have much less access to mental health resources. Rural adoption rates of mental health innovations are at just **7%** today.

However, interest rates are **26%**, and much of that interest comes from highly accessible, smartphone app solutions:



Mental health apps

Digital symptom tracking and journaling apps

Great solutions are already available — speaking directly to these populations through the right marketing and narratives could raise adoption rates.

Questions to Ask Yourself & Your Teams

- ☐ In what ways can we partner with others to expand marketing and education to reach rural audiences?
- ☐ Have we considered how our messaging understands or speaks to the needs of rural audiences, especially about mental health?

#4 Wellness for Every Body and Mind

Reach every body and mind. Wellness isn't just for people who are young, fit, and healthy already; it's for everyone. That means accounting for a range of ages, physical abilities, chronic conditions, body sizes, mental health conditions, and more.

Benefits and beliefs across the *generations*

Top-ranked benefit:

More than any other generations, they rank this benefit highly:

Save money

Help me be more consistent

Track progress toward my goals

Work on my goals on my own time

Did you know?

80% of Gen Z believes that health and wellness technologies and innovations can help them understand how different aspects of their health and body are connected.

And yet, 49% feel that a lot of health innovations are not being designed for them or their needs.

Boomers stand to benefit from new wellness technologies

Despite some positive attitudes…

- 94% of Boomers agree, “Health and wellness technologies and innovations have the potential to help improve people’s quality of life”

…they have the least tech experience

- 13.5% lower adoption across wellness categories than for all respondents
- Only 17% agree, “I am the first to try new health and wellness innovations”

Boomers are interested in more…

- 16% average higher interest vs. adoption

…as long as they can save money and time

- 50% of Boomers said wellness innovations are too expensive, vs. 42% on average
- Only 20% see “save money” as a benefit and only 16% see “save time” as a benefit — well below other generations

Questions to Ask Yourself & Your Teams

☐ Do we understand how all of these demographic and psychographic factors intertwine to impact our audiences’ lived experience?

☐ Are we using straightforward, actionable content to educate and engage audiences with a range of bodies and minds?

What Consumers Are Looking for from *Brands*

Today, people have high expectations for wellness brands, especially in terms of affordability, ease of use, and their core values. There is potential for marketers to meet consumers where they are.

Accessibility

59% Make affordability a priority

▲ BOOMERS, 72%

50% Make ease of use a priority

▲ BOOMERS, 58%

42% Make innovations that are accessible to low-income communities

▲ BOOMERS, 48%

Researched

44% Have research to support the safety of their innovations

43% Have research to support effectiveness of their innovations

38% Seek to understand the experiences of people living with health conditions

33% Seek to understand the experiences of all people regardless of their background

▲ GEN Z, 40%

Values

49% Care for the health of people living with chronic conditions

▲ BOOMERS, 57%
▲ RURAL RESPONDENTS, 54%

48% Motivated to improve people's quality of life beyond making profit
▲ BOOMERS, 56%

44% Motivated to find cures for diseases
▲ RURAL RESPONDENTS, 48%

42% Value consumers' mental and emotional health
▲ GEN X, 47%

29% Provide a safe and rewarding environment for their employees
▲ GEN Z, 40%

27% Consider the impact of their practices on the environment
▲ GEN Z, 34%

The Future Is Now: Let's Take the Next Steps

The opportunity ahead of us is bright. Consumers are enthusiastic about the role health and wellness innovations can play in their lives. Here's a checklist to spark dialogue among your teams and with your partners for how we can take steps to connect with a larger audience and reach more people who are inspired by the future of wellness.

Brand Values

- ☐ Are we understanding the ways our brand and products manifest in the lifestyle consumers want for themselves?
- ☐ Are we meeting expectations around affordability, ease of use, and other top consumer needs?
- ☐ How do we communicate our values, mission, and priorities today, and are there opportunities to resonate more with what audiences value, too?

Insights

- ☐ Do different segments of our audience have different cultural experiences with wellness technology?
- ☐ Do we spend time listening and responding to real questions from real consumers?
- ☐ Are we asking the data the right questions to uncover opportunities for growth?

Communication and Messaging

- ☐ Does our messaging reflect the positive attitudes consumers have towards innovations?
- ☐ How are we accounting for the greatest representation in our content, messaging, and campaign planning?
- ☐ Does our content and messaging prioritize access through easy-to-read recommendations and how-tos?
- ☐ Are we celebrating consumer optimism and empowering them with next steps to take on their wellness journey?

Healthline Media and Op4G (Opinions for Good) conducted an online survey, fielding 2,102 respondents in August 2021. Data was weighted to ensure the data is representative of the general U.S. population ages 18+.

Who's Who: Defining Our Demographics

Gen Z: 18 - 24 years old
Millennials: 25 - 40 years old
Gen X: 41 - 56 years old
Boomers: 57 - 75 years old

Low-income: Less than $50,000
Medium-income: $50,000 to $99,000
High-income: More than $100,000

Low education level: High school or lower, vocational training/associate degree
Medium education level: College degree/bachelors degree
High education level: Post college/doctorate degree

Visit HealthlineMedia.com/future-of-wellness to explore other elements of Future of Wellness. For more information on this study, please email us or contact your Healthline Media representative.