



Consumers are driving change in health and wellness

A guide to the evolving trends and conversations around a rapidly shifting space

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Executive summary

The conversation around health and wellness continues to evolve, having shifted significantly over the past few years. Consumers are now more willing to adopt a broader lens when it comes to considering what it means to be healthy or how they might meet personal health goals. With this expanded perspective, consumers want to gain more control over their health and wellness decisions—and seek brands that can empower them with more actionable information and relevant opportunities.

Technology, adopted at significant levels during the pandemic, continues to provide consumers flexibility with how and where they access health and wellness activities, as well as better tracking of individual performance and progress toward goals. At the same time, greater public awareness reduces the stigmas associated with mental health needs and care, and education continues to elevate the importance of nutrition in improving and maintaining overall health. In fact, consumers increasingly acknowledge the role food plays in managing health, such as helping to alleviate or prevent chronic disease.

As shifting economic concerns and anxieties abound, meeting consumers where they're at is more important than ever to establishing trust, cultivating loyalty, and promoting accessibility.

This guide provides an in-depth look at the evolving landscape of health and wellness, highlighting ways that brands can create meaningful experiences, services, and products across many industries that are relevant for a consumer base with shifting needs and expectations.

An evolving conversation

With a changing perception of health and wellness comes new ways for various demographics to engage in the discussion around these topics. Tracked by gender, some distinctions are evident. According to a **report by Adweek and Twitter Marketing¹**, women are twice as likely as men to discuss topics around self-care (2.1x) and gluten-free lifestyles (2x). Meanwhile, men are significantly more likely than women to discuss fitness blogs (4.3x) and bodybuilding (2.9x).

Despite these differences, men are increasingly joining the conversation around health and wellness. The same report points to the fact that year-over-year (YOY), men talk about dieting with exceptionally increasing frequency—an 88% increase—while women’s discussion of work-life balance is up over 120% YOY.

With this evolving conversation also comes the need for information vetting. In response, the Federal Trade Commission (FTC) recently **cracked down on vague health claims²** made by technology and over-the-counter consumer packaged goods (CPG) brands entering the health and wellness space. Both the claims made by such brands, as well as their disclaimers about a product’s limitations, must now be impactful and backed by science.

As these conversations—and their regulation—continue to evolve in meaningful ways and continue to experience increased attention as consumers emerge from the pandemic with more nuanced perspectives, we see three key trends impacting health and wellness in 2023:

1

Leaning into the power of connection

2

Underscoring the holistic perspective

3

Making wellness more accessible

¹ <https://www.adweek.com/sponsored/the-evolving-conversation-on-health-and-wellness/>

² <https://www.insiderintelligence.com/content/ftc-updated-its-health-products-compliance-guidelines-here-s-what-marketers-need-know>



Trend **1**: Leaning into the power of connection

The beginning of the COVID-19 pandemic forced fitness brands to scramble to stay connected with their members, and included a rush to produce on-demand content. With the lifting of pandemic-era restrictions on facilities, fitness brands now seek to rebuild the energy of in-person and group experiences and aim to drive community and connection as workout habits and preferences shift.

Embracing the return to social fitness

In the U.S., adults now mix up their workout locations³, with 42% choosing to work out exclusively at home and 51% splitting time between home and the gym. This return to in-person experiences is coupled with the need for brands to meet people where they are. Brands should accommodate those excited to return to group experiences while maintaining connections with those who remain committed to their at-home workout routines. Delivering the right value while also maintaining the brand experience across varied channels is key to ensuring brand equity is maintained and resilient, loyal relationships are cultivated.

As part of its summertime **Souls Reunited** campaign⁴, Soul Cycle urged riders to swap the home gym for a return to the atmosphere of its in-person rides with a special offer: turn in your Peloton bike in exchange for free classes. The first 100 eligible riders received 47 free in-studio classes and complimentary pickup of their Peloton bikes.

While Soul Cycle leaned into the excitement and nostalgia for in-person rides, Lululemon Studio sought to cater to those consumers interested in a more hybrid workout routine. By **expanding its Studio Mirror subscription** to include **partnerships with sought-after trainers and studios**⁵, members can now choose to stream their favorite studios or attend in-person classes with their \$39 monthly subscription.

42%

of adults in the U.S. choose to work out exclusively at home and 51% choose a hybrid approach—splitting their time between home and the gym³.

³ <https://www.insiderintelligence.com/chart/257685/expected-fitness-routine-location-split-according-us-consumers-june-2022-of-respondents>

⁴ <https://people.com/sports/souls-reunited-soulcycle-is-offering-peloton-riders-to-trade-in-their-bikes-for-free-classes/>

⁵ <https://shop.lululemon.com/story/lululemon-studio>

Likewise, Nike elevated its standard running app by building out meaningful components for users interested in making their running experience more social. The Nike Run Club app⁶ (and to a lesser extent, the Nike Training Club app) offers runners a sense of connection by encouraging in-person meetups and friendly-but-competitive challenges. Through a partnership with Headspace, Nike Run Club also offers meditative runs—in addition to traditionally guided runs—to cater to consumers whose expanded understanding of overall well-being⁷ includes mental health.

Opportunity: Meet consumers where they are

A lack of time, money, and motivation are barriers to entry when it comes to starting or maintaining an exercise routine. Through on-demand video, real-time streams, and in-person meetups, brands continue to motivate consumers via tech-fueled engagement and shared beliefs in the power of moving. Whether in-person, hybrid, or online, brands should look for ways to build relevancy and meaning into how they connect with consumers and align with shifting needs and expectations to deepen engagement and foster loyalty.

Trend 2: Underscoring the holistic perspective

Traditionally, conversations around health were limited to diet and exercise. For many, the pandemic brought to light the need to recognize “healthy” as a larger puzzle with many pieces. Now, consumers adopt a more holistic perspective of the term, broadened to include topics like food as medicine, mental well-being, financial health, work-life balance, and social boundaries.

Destigmatizing mental health

Whether it’s through school, work, pop culture, or social media, the discussion about mental health continues to be increasingly destigmatized. The number of people posting on Twitter about mental health is up 4% over the past year—that’s 1.4 million more users openly discussing the topic on the platform—according to the **Twitter Conversation Report**.⁸ Since 2020 alone, there has been a 30% increase in tweet impressions, retweets, and replies around the topic of mental health.

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⁶ <https://www.makeuseof.com/make-the-most-of-nike-run-club-app/>

⁷ <https://www.insiderintelligence.com/content/social-determinants-of-health-investments>

⁸ <https://www.adweek.com/sponsored/the-evolving-conversation-on-health-and-wellness/>



Though spurred in part by the pandemic, mental health continues to take center stage for individuals—and brands continue to respond accordingly⁹.

The increasing role of food as medicine

While the link between food and weight loss is nothing new, consumers now place a greater emphasis on the role of food when it comes to overall well-being. This is true not only for general health, but also for the concept of food as medicine, wherein people link the nutritional value of foods to preventing, treating, or alleviating the symptoms of certain ailments or illnesses. In fact, **78% of consumers agree or strongly agree that the right foods will keep them healthy, and 76% believe that such foods may help alleviate certain health problems¹⁰**. While healthier and more intentional eating often aligns with medical advice, it's important for consumers to check with their physicians about **changes in diet and potential drug interactions¹¹** (grapefruit juice is a common example doctors say to avoid because of its ability to enhance or disrupt the effect of certain medications).

Larger grocery brands across the country continue to tap into the significant health benefits of nutrition. Grocers including Kroger, Albertsons, Giant Food, Hy-Vee, and Stop & Shop have all announced programs increasing access to healthier foods or nutritional expertise to deliver more of the information, value, and opportunities consumers are looking for in this space.

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⁹ <https://www.icf.com/insights/engagement/embracing-mental-health>

¹⁰ <https://www.supermarketnews.com/issues-trends/food-medicine-concept-embraced-consumers>

¹¹ <https://www.medicalnewstoday.com/articles/can-food-be-medicine-pros-and-cons#Food-as-medicine>

Brands expand the definition of health and wellness

Brands across industries continue to embrace this more holistic approach to health. After operating for 20 years under the name Beachbody, the company rebranded to BODi as part of an effort to promote “health esteem.”

In a letter penned by CEO Carl Daikeler¹², the announcement to members recognized the connection between the Beachbody brand name and a negative “mindset of permanent dissatisfaction.” BODi, on the other hand, aims to associate success with positive self-esteem, fitness, and nutrition. While such realignments can help push companies toward a more holistic approach, it’s important for brands to focus on **authenticity**¹³ to align with consumers.

Hims & Hers, a telehealth company selling prescription and over-the-counter drugs as well as personal care products, **recently introduced**¹⁴ a line of supplements specifically designed to support mental well-being through better sleep, more effective stress management, and greater clarity. This personalized approach to wellness aims to support multiple facets of an individual’s health with an emphasis on mental health and other daily stress factors.

While these brands help reframe the conversation about health and wellness, other companies bring entirely new conversations to the public space. From menstrual cycles to menopause, brands now increasingly put women’s health in a more direct spotlight, aiming to both destigmatize the topic and **empower female consumers**¹⁵ with increased access to information and products. Among them is **Agni**¹⁶, a self-described “food healing company” that makes cookies, teas, and seasonings for women experiencing symptoms of hormonal imbalance during their periods. These recipes are based on science, with Agni on track to be one of the first brands in women’s health to conduct clinical trials on the efficacy of its products.

Opportunity: Show consumers a broader perspective to empower informed decisions

Though an important part of the health journey for many, wellness is no longer about just physical fitness and exercise. Brands aspire to empathize with the victims of outdated attitudes, fight stigmas, and educate customers and the public about the root causes of discomfort. As part of this broader approach to health and wellness, companies strive to empower consumers with information and evidence so that they can make the choices that benefit their overall well-being.

¹² <https://www.beachbodyondemand.com/blog/beachbody-carl-daikeler-ceo-letter>

¹³ <https://www.icf.com/insights/engagement/brand-challenges>

¹⁴ <https://investors.forhims.com/news/news-details/2022/Hims--Hers-Launches-New-Line-of-Mental-Wellness-Supplements-With-More-Options-to-Help-Support-Stress-Sleep-and-Lack-of-Focus/default.aspx>

¹⁵ <https://www.thrillist.com/eat/nation/food-brands-prioritizing-reproductive-health>

¹⁶ <https://agniforall.com/>

Trend **3**: Making wellness more accessible

Health and wellness remain a luxury for many—it takes time, money, and effort to invest in a gym membership, consult a nutritionist or therapist, and pay for products like supplements and healthier foods.

44% of adults say they own smart fitness equipment, and 45% of those who don't would like to in the future¹⁷. Likewise, with 29% of the population owning a “smart” device—such as a sleep tracker, smart bathroom scale, or fitness tracker—this leaves a large gap of those for whom such devices may feel unattainable.

Additionally, not all people see themselves represented in the industry, including people of color, those with physical disabilities, and members of the LGBTQ+ community. In addition to a lack of representation, **cultural appropriation**¹⁸ of health practices remains a concern for many.

To help alleviate barriers to entry, brands continue to look for ways to support consumers on their personal health and wellness journeys through offers, campaigns, and new approaches to pricing. This includes a democratization of health that emphasizes information and accessibility across the board in an effort to empower all consumers at every stage of their health journey.

Leveraging technology to increase vitals tracking

Google recently launched its **Pixel Watch**¹⁹, a smartwatch designed to deliver the best in health tracking. By leveraging FitBit technology, the watch offers personalized vitals tracking, as well as mindfulness features, exercise tracking, and personalized workouts. While meeting other standard smartwatch functionality, the Pixel Watch emphasizes its FitBit health features as a first-in-class fitness device that can increase accessibility to health tracking. We hope to see more insurers update coverage models to cover the costs of wearables like these, especially as doctors start to recommend them or use them to remotely monitor their patients.

Increased representation at the gym

In partnership with professional surfer and adaptability advocate Bethany Hamilton and Paralympics Games medalist Blake Leeper, Degree Deodorant launched a hiring portal—**TrainersForHire.com**²⁰—connecting fitness businesses to **trainers with disabilities**²¹.

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¹⁷ <https://www.insiderintelligence.com/content/digital-fitness-brands-2022>

¹⁸ <https://www.nbcnews.com/news/asian-america/white-women-co-opted-pandemic-yoga-now-south-asian-instructors-n1263952>

¹⁹ https://store.google.com/product/google_pixel_watch?hl=en-US

²⁰ <https://www.degreedeodorant.com/us/trainersforhire/>

²¹ <https://www.prnewswire.com/news-releases/degree-deodorant-launches-trainersforhire-campaign-to-challenge-fitness-industry-after-81-of-people-with-disabilities-say-they-do-not-feel-welcome-in-fitness-spaces-301380445.html>

Highlighting the fact that **81% of people with disabilities don't feel welcome in fitness industry spaces**²², the company laid out a goal of increasing representation while also calling on the training community to rethink notions about coaching to an inclusive crowd.

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Offering affordable fitness membership pricing

As economic shifts and anxieties around inflation impact consumer spending, some **brands remain committed**²³ to providing health opportunities that don't break the bank. **Planet Fitness**²⁴ membership outpaces the fitness performance industry, largely due to its budget-friendly \$10 monthly membership. The membership is also commitment-free, making it even more popular for those looking to cut back on spending without giving up access to the gym.

To address the needs of more price-sensitive consumers, Peloton recently expanded its offering by adding **leasing options**²⁵. Instead of buying a bike outright, riders can rent bikes and access all classes and features for one monthly fee. Additionally, the brand also entered the resale market to sell used equipment at secondhand prices.

Supporting wellness on the move

As personal and business travel rebounds from pandemic lows, there is an increased opportunity to promote health and wellness consistency despite changes in location or environment. To infuse wellness into all facets of the guest experience, **Hilton partnered with Peloton to bring Peloton**²⁶ bikes to fitness centers in nearly all of its 5,400 Hilton-branded hotels. Members of the company's Hilton Honors loyalty program receive a 90-day free trial of the Peloton app and special pricing on equipment such as the Peloton bike, in addition to subscriptions and guides. The hotel brand also focuses on wellness as part of its spa programs, hotel designs, room amenities, and food and beverage offerings.

Opportunity: Remove barriers to support the wellness journey for all

While it's important to support consumers at any point on their wellness journey, brands should recognize that the journey has yet to begin for many. Whether due to lack of representation or affordability, several barriers to entry into health and wellness remain. Brands can innovate by listening to customers and identifying pain points—both with their offerings or more generally. From wearables to the service experience, brands can help consumers enter the market, track progress, and make health and wellness a more inclusive experience.

²² <https://www.degreedeodorant.com/us/trainersforhire/>

²³ <https://go.placer.ai/wp/brands-that-are-beating-inflation>

²⁴ <https://www.planetfitness.com/>

²⁵ <https://www.onepeloton.com/bike/rentals>

²⁶ <https://www.hilton.com/en/p/partners/peloton/>



Closing thoughts

Health and wellness is a trend that permeates industries beyond fitness, including retail, CPG, travel, hospitality, and financial services—and there is a tremendous opportunity for brands to lean into this space to be more relevant with consumers. With the line between wellness and more traditional healthcare blurring, the FTC emphasizes the importance of regulating vague claims made by brands as they seek to become players in this space. Brands that succeed in this area do so by developing and marketing products and services that promote health by investing in shared values and beliefs, educating consumers to build credibility, delivering on trust and appreciation, and **empathizing**²⁷ with the individual.

A shared community can be a powerful source of motivation that helps consumers hold themselves accountable to health and wellness goals. More consumers are comfortable gathering in larger groups and enclosed spaces while also utilizing digital means to join group workouts. Moving forward, brands must continue to accommodate the dual needs for connection and flexibility, while making sure that the customer experience continues to be a focus no matter the channel.

Health and wellness is more than moving one's body or pushing it to the limit—it's also about what goes into the body, and how external or internal factors affect the emotional state. Brands and consumers alike realize that many factors contribute to the overall quality of health. Brands continue to prioritize educating consumers by providing means to monitor their own data, benchmarking where they are, and empowering them to take more impactful steps to a healthier state of being.

Just as with healthcare, it's important to understand that when it comes to personal wellness, what works for some individuals may not work for others; health and wellness is not one-size-fits-all. Brands will need to be strategic and clear about whom their products are for. Where it's possible, brands should also personalize products, services, and communications—empowering consumers to access the right offering at the right time to fit their own needs.

²⁷ <https://www.icf.com/insights/engagement/turbulent-times-empathy-foundation>

Brand checklist: Health and wellness do's and don'ts

For brands looking to take the next step in aligning themselves to what consumers are looking for in the health and wellness space, keep the following in mind:

Do...

- Offer flexibility in subscription of membership offerings. One variable may be the price, but others could include benefits such as access to different channels, formats, and information.
- Back up any health claims made about services or products. Anecdotal or qualitative results are one thing, but numbers and scientific outcomes evoke confidence and comfort for consumers.
- Empower consumers with knowledge about themselves and their options. Better informing consumers leads to greater brand trust and reliability, which are both key drivers for emotional loyalty.

Don't...

- Create disparate cross-channel brand experiences. It can be confusing when members find digital channels to be an underdeveloped echo of in-person brand experiences.
- Launch new branding without going through a series of checks and balances. Announcing updated mission statements before adoption of an ethos across all aspects of a business can come across as inauthentic.
- Ignore exclusionary messaging or product design. Consider how services or products can have greater representation and adaptability.

About the author



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Lauren enjoys the continuous learning that comes from working across industries. She is known for her ability to synthesize tons of exploratory research (primary and secondary) into actionable insights that inform strategic recommendations.

Key industries that she keeps tabs on are travel and hospitality, retail/CPG, and the creator industries. She's had the privilege to work with clients like Wyndham, Hilton, Amtrak, Sonesta, Fogo de Chão, Gabe's, Metropolitan Airport Commission, TheBrandLab, J&J Gaming, and Darden Restaurants. Projects have included partner relationship management, competitive analyses, industry analyses, loyalty program designs, customer journey mapping, stakeholder interviews, and deep-dives into trending topics.

Prior to joining the ICF Next team, Lauren completed her Masters of Business Administration and worked with clients on real-world challenges ranging from economic development to product and market research. Before pursuing a graduate degree, she was in real estate and residential construction covering client, proposal, contract and marketing management.

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