WAKEFIELD

The State of Hyper Wellness 2022:

Going Beyond the Doctor's Office, Americans Look to Growing Industry to Optimize Health

September 2022

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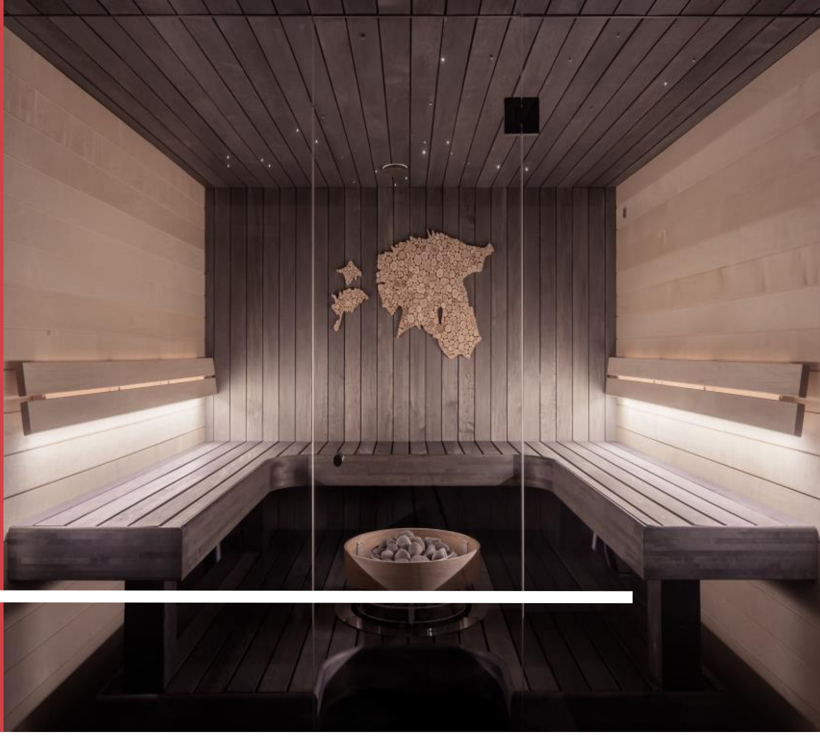
restore
HYPER WELLNESS

Table of Contents

The State of Hyper Wellness 2022



Executive Summary

Over 3 in 5 Americans (63%) believe investing in Hyper Wellness activities, services and products can help them save on the long-term financial costs of the effects of aging and sickness. With more than 3 in 4 Americans (76%) reporting they frequently experience negative physical or mental symptoms like stress, anxiety, fatigue, lack of focus, chronic pain, and unhealthy skin, it's no wonder many are seeking better support for their bodies and minds.

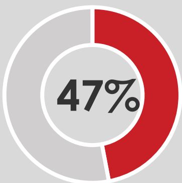
While the average American feels it's best to start focusing on preventive health and wellness at age 30, many are looking to start earlier. **The average Gen Z-er is ready to start focusing on preventive health and wellness at age 22 and Millennials believe this should start at age 26.** From cryotherapy to biomarker assessment to intravenous supplements, Hyper Wellness aligns with these demographics, underscoring the potential for long-term growth.

Nearly half of Americans (47%) and most Gen Z (54%) and Millennials (56%) view aging and sickness as inevitable and feel hopeless to prevent them. Given this prevailing mood, Hyper Wellness could fuel a proactive health mindset and provide a greater sense of control**. More than a third of Americans (34%) already view Hyper Wellness offerings as an essential part of a wellness routine, and close to half (47%) plan to try Hyper Wellness activities, services, or products in the next 12 months**. Of those who have engaged in Hyper Wellness offerings in the past year, almost 9 in 10 (88%) are planning to do so again in the next 12 months. This further demonstrates the potential for Hyper Wellness to increase in popularity.

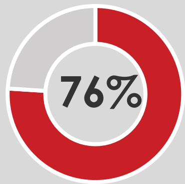
Restore describes Hyper Wellness as grounded in 9 elements they believe everyone should incorporate into their everyday lives: oxygen, hydration, nourishment, cold, heat, light, movement, rest and connection. As Hyper Wellness activities, services, and products become accessible to a larger swath of the country, they could well become an integral part of mainstream preventive and wellness services that are routinely used by Americans urban, suburban, or rural, across a range of incomes.

Key Findings

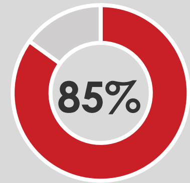
Current State of Wellness



believe aging and sickness are inevitable and feel hopeless in trying to prevent them

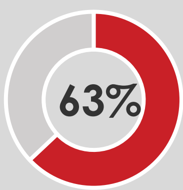


say they frequently experience negative physical or mental symptoms like stress, fatigue, lack of focus, and chronic pain

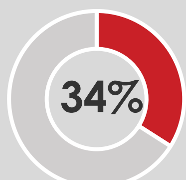


would be willing to try a new Hyper Wellness activity, service, or product

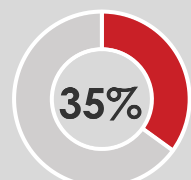
Interest in Hyper Wellness



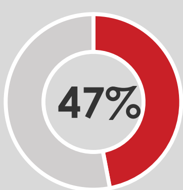
believe investing in Hyper Wellness activities, services or products can help them save money in the long-term



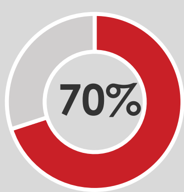
view Hyper Wellness as an essential part of a wellness routine



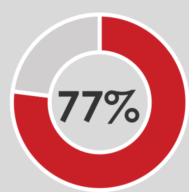
have used at least one Hyper Wellness activity, service, or product in the past 12 months



plan to engage in Hyper Wellness in the next 12 months



of Gen Z are interested in trying Hyper Wellness



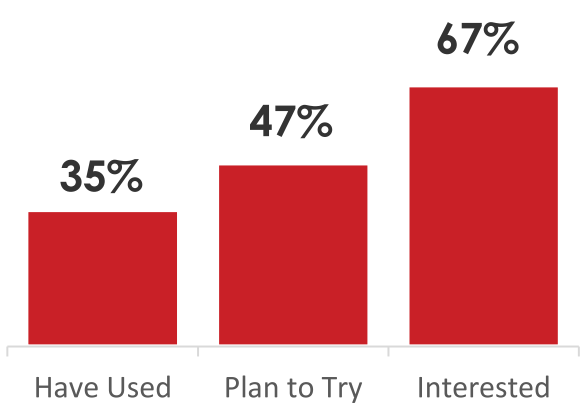
of Millennials are interested in trying Hyper Wellness

Big Plans

While 35% of Americans have engaged in Hyper Wellness offerings already, 47% plan to do so within the next 12 months, and 67% are interested in trying them.

Hyper Wellness has a growing appeal to younger generations in particular. Fully 70% of Gen Z, 77% of Millennials and 73% of Gen X are interested in trying at least one Hyper Wellness offering. In fact, nearly half of Gen Z (49%) and more than half of Millennials (54%) and Gen X (53%) say they'd either be among the first to try a new Hyper Wellness offering or eager to try it after some initial reviews.

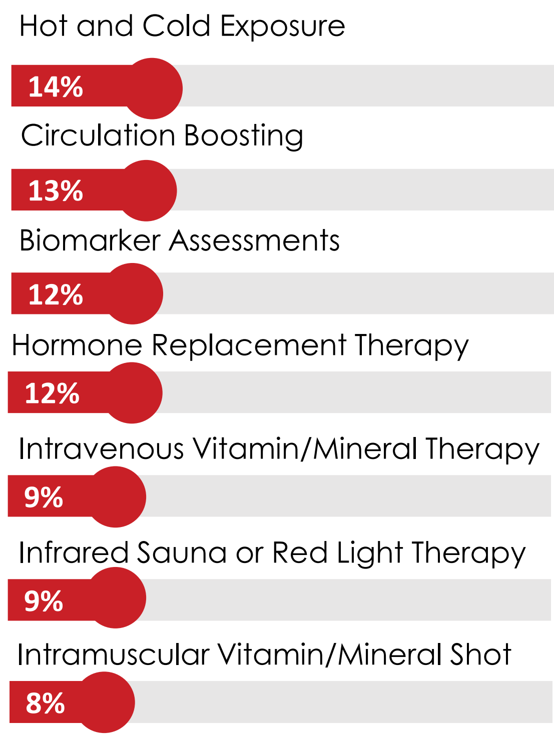
Interest and Experience with Hyper Wellness Products and Services



For those planning to use Hyper Wellness services, preferences vary and lean toward more established offerings.

These younger generations in particular recognize the potential benefits of Hyper Wellness. The majority of Millennials (70%), Gen X (68%) and Gen Z (59%) believe

Hyper Wellness Services Planned for the Next 12 Months

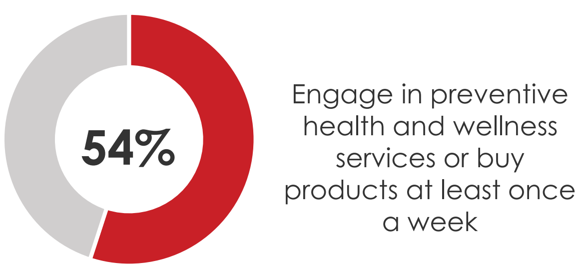


investing in Hyper Wellness services could save money on the long-term costs of aging and sickness. Already, 2 in 5 Millennials (41%) and nearly as many Gen Z (39%) and Gen X (37%) see Hyper Wellness as an essential part of a wellness routine. Among Americans who engage in preventive health and wellness activities at least once a week, more than half (55%) plan to pursue Hyper Wellness.

Entering the Mainstream

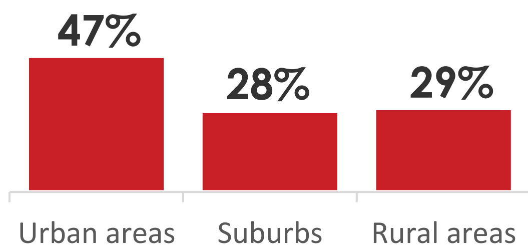
More than half of Americans (54%) report that preventive health measures are woven into their routines: they engage in preventive health and wellness services, or buy related products, at least once a week. More than a quarter (28%) say it's a daily occurrence. In fact, a quarter of Americans who engage in preventive health and wellness (25%) say they couldn't go a full week without their health and wellness routine before experiencing negative mental and/or physical effects.

Most Engage Regularly in Preventive Health and Wellness



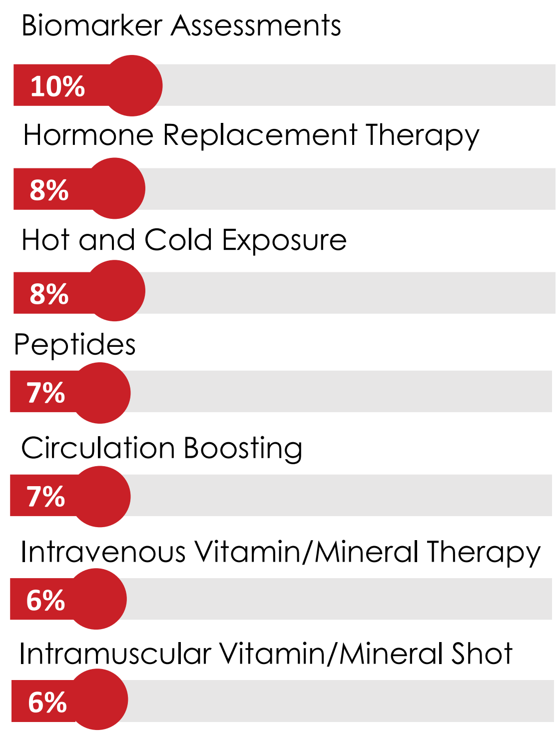
More than a third of Americans (35%) have stepped their preventive health and wellness up a notch and used at least one Hyper Wellness activity, service, or product in the past 12 months. The services appeal to both genders, with nearly 2 in 5 men (39%) and nearly a third of women (31%) saying they have used Hyper Wellness offerings in the past 12 months.

Use of Hyper Wellness Services Varies by Area



Experience with Hyper Wellness has been reported nationwide, though it's more common among those in the West (42%) than those in the Midwest (35%), South (33%), or Northeast (28%). And experience is higher among those in the city (47%) than those in rural (29%) or suburban (28%) areas.

Hyper Wellness Services Partaken in During the Past 12 Months

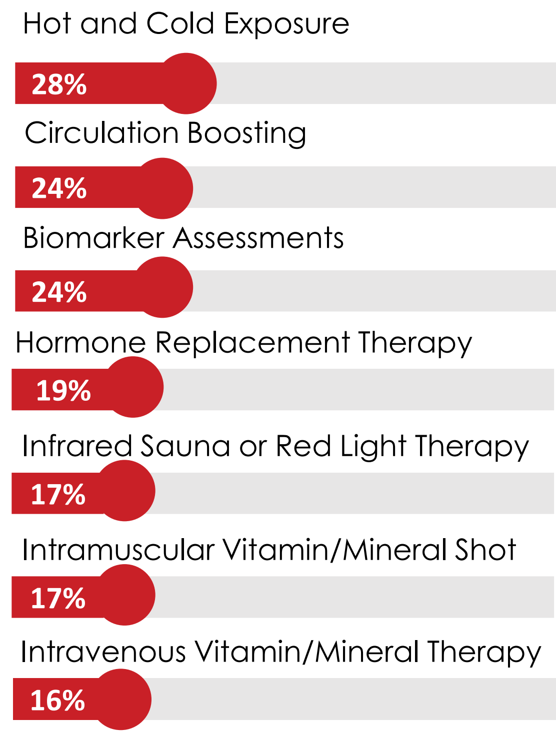


Many Americans who have never tried a Hyper Wellness activity, service or product are open to taking this step, though perhaps cautiously. More than 4 in 5 Americans (85%) would be willing to try a new Hyper Wellness offering, though 39% admit they would be hesitant about taking that first step.

As with many health trends, Hyper Wellness appears to be sprouting outward from the city. Urbanites (19%) are more likely to say they're ready to be among the first to try a new Hyper Wellness offering, compared to 8% of suburbanites and 6% in rural areas. Gender matters here too. More than a quarter of urban men (26%) report they'd be among the first to try it, compared to 12% of their female peers and fewer of those in non-urban areas.

More than 2 in 3 Americans (67%) identified at least one Hyper Wellness offering they are interested in trying. Echoing those already planning Hyper Wellness services, interest leans towards offerings that are more established. The most common of these are extreme heat and cold exposure to target fat cells and slim down (28%), followed by interest in circulation-boosting arm, leg, and hip compression (24%), biomarker assessments (24%), and hormone replacement therapy (19%).

Hyper Wellness Offerings of Greatest Interest



More than **4 in 5** Americans would be **willing to try a new Hyper Wellness offering**

Barriers to Wellness Services

Nearly all (95%) believe preventive health and wellness offerings have potential benefits, making Hyper Wellness an easy fit for Americans looking for additional options to enhance their health. The most frequently cited potential benefits of preventive health and wellness are improved physical health (71%) and better sleep (64%). Nearly as many see a potential benefit of keeping them sharp mentally (61%) – of particular interest to the 20% of Americans who report experiencing a frequent lack of mental focus. In addition, nearly 3 in 5 see the potential for boosting the immune system (59%), and for feeling more refreshed, with more energy (59%).

Top Potential Benefits of Preventive Health and Wellness

71% improved physical health

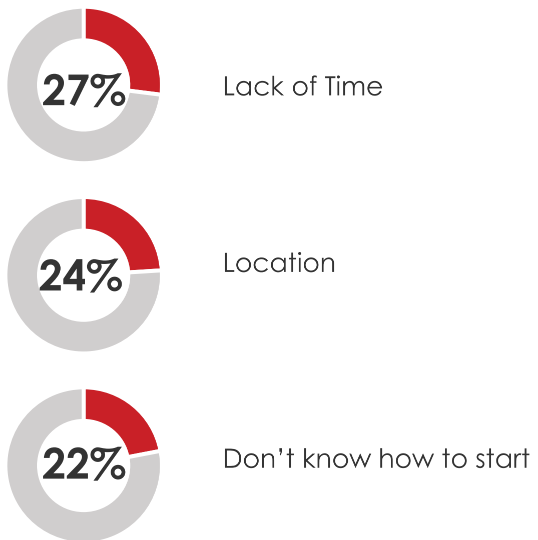
64% better sleep

61% keeping sharp mentally

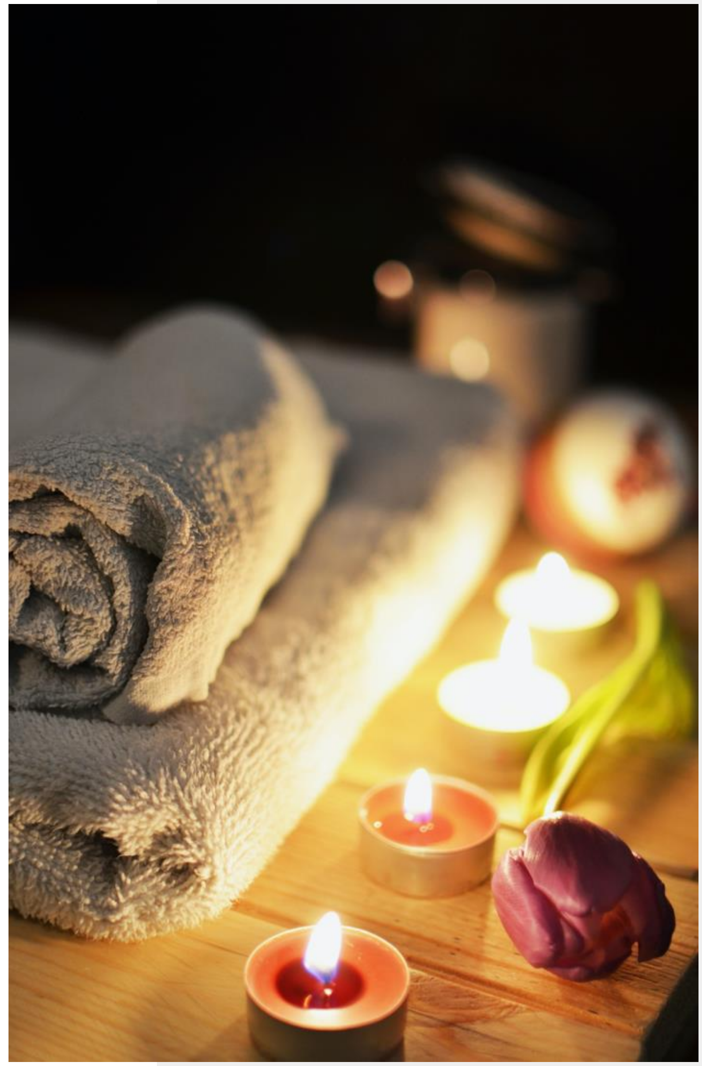
About half (51%) point to reduced healthcare costs in the long run as a potential benefit of preventive health and wellness activities, services and/or products. As Americans seek a level of control over their health to avoid costly treatments, medications, and hospitalization, Hyper Wellness could be a tool they increasingly choose. Nearly half say preventive health and wellness could potentially help them manage pain or a chronic condition (46%). Others would seek to mitigate or reverse common conditions like high blood pressure (46%). More than 2 in 5 (43%) believe preventive health and wellness can help delay signs of aging. And more than 3 in 10 cite a potential benefit in managing autoimmune symptoms (31%), something that 8% report they experience frequently.

Despite the perceived benefits of preventive health and wellness, more than 4 in 5 (82%) note potential barriers to using these products/services. Given rising inflation, cost (53%) is the most commonly reported potential barrier. Women are more likely than men to see cost as a barrier (58% vs 49%). But a closer look reveals that cost concerns do not pose an insurmountable barrier. Despite these cost concerns, more than 3 in 5 who have a wellness routine (62%) say expenses related to preventive health and wellness would be one of the last expenses they would cut back on if they had to cut monthly expenses due to inflated costs. Over 4 in 5 (83%) believe that cutting back on health and wellness expenses ends up costing more in the long-term, even in an economic recession. And over half with a wellness routine would prioritize wellness expenses over shopping for non-necessities (67%), attending social gatherings that involve payments (62%), buying coffee from a store or café (58%), and ordering takeout/delivery or going out to a restaurant (52%). Nearly a third (31%) would even cut cable or steaming services before cutting back on health and wellness expenses.

Logistical Barriers to Preventive Health and Wellness



Some face logistical barriers to preventive health and wellness services as well, including lack of time (27%), location (24%), and not being sure how to get started (22%). Time and location are more common barriers among those younger than 40 (34% cite lack of time and 30% cite location) than among their older peers (22% and 21%, respectively). More than a third of Gen Z (34%) say they’re simply unsure how to get started, as do 27% of Millennials. Their older peers (22% of Gen X and 13% of Boomers/Silent Generation) are less likely to cite this uncertainty as an obstacle.



Conclusion

With more than 1 in 3 Americans having used Hyper Wellness services already and nearly half planning to do so in the coming year, Hyper Wellness could soon be seen as an essential part of preventive health and overall wellness, particularly by Millennials and Gen Z. Given their nearly pervasive interest in preventive health and wellness, Hyper Wellness may offer a way to help them achieve optimal well-being, avoid illness, and potentially ease or prevent the physical decline of aging.

Even in a time of economic uncertainty and difficult choices imposed by inflation, Hyper Wellness is seen by many as an essential part of wellness routines, offering the potential to deliver results that reduce medical costs down the road. As Hyper Wellness locations steadily increase beyond urban to suburban and rural areas, accessing services will be more convenient, removing cited obstacles such as time constraints and distance.

With over half of Gen Z and Millennials planning to partake of one or more Hyper Wellness services in the next 12 months, this latest complement to overall wellness could become a mainstay of younger generations.

Methodological Notes

The Restore Hyper Wellness Survey was conducted by Wakefield Research among 2,000 nationally representative US adults ages 18+, between July 28th and August 4th, 2022, using an email invitation and an online survey. This data has been weighted to ensure accurate representation of US adults ages 18+.

Results of any sample are subject to sampling variation. The magnitude of the variation is measurable and is affected by the number of interviews and the level of the percentages expressing the results. For the interviews conducted in this particular study, the chances are 95 in 100 that a survey result does not vary, plus or minus, by more than 2.2 percentage points from the result that would be obtained if interviews had been conducted with all persons in the universe represented by the sample.

Thank You

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