In Health We Trust

A **HEALTHLINE MEDIA** REPORT

In Health We Trust

2020 brought health to the forefront of our collective consciousness, and showed us that health quite literally makes the world go round. Now, we're more tuned into what it means to be well, and more invested in achieving it.

In February 2020 (pre-pandemic), Healthline Media collected feedback from 1,500 people across the U.S. to understand their health-related mindset and priorities. Then, COVID-19 put health in society's cross-hairs. We wanted to see how this global health crisis impacted people's sentiments. So, we conducted a second survey in December, and compared the responses.*

What we found is that, collectively, we've risen to the occasion.

We're resilient in the face of fragility and more trusting of our ability to heal. We're confident in our systems. We're finding solace in the unexpected. And above all, we're fiercely protective of ourselves.

In Health We Trust speaks to the solidity and perseverance of our health. To its non-negotiable gravitas. To its ubiquity and foreverness. To its being a part of all of us, and all aspects of us.

Health is, ultimately, the great unifier.

And in it we trust.

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

Doctors are the new celebrity

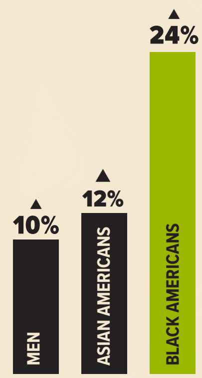
Maybe it's the Fauci Effect, but across the board our trust in doctors is rising.

52%

OF US TRUST DOCTORS AND HEED THEIR ADVICE

THIS IS AN INCREASE FOR US ALL

INCREASE IS BIGGEST AMONG



We value healthcare more than before

Every generation is less likely to consider the cost of their healthcare before a visit to the doctor than they were pre-pandemic.

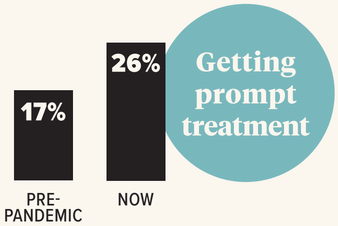
% WHO CONSIDER THE COST BEFORE GOING TO THE DOCTOR

	B	X	M	Z*
PRE-PANDEMIC	28%	47%	58%	58%
NOW	26%	39%	47%	51%

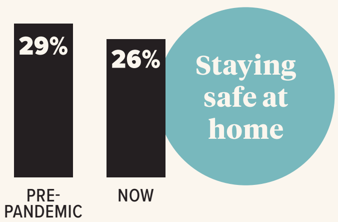
Health-seeking behaviors vary across the age groups

When we do need care, we now have to weigh the **risks associated with leaving home** against the **risks of not getting prompt healthcare**.

GEN Z IS MORE LIKELY
TO GO TO THE DOCTOR AS SOON AS POSSIBLE



BOOMERS ARE LESS LIKELY
TO GO TO THE DOCTOR AS SOON AS POSSIBLE



INCREASED RESPECT FOR DOCTORS

+

FEAR OF GETTING SERIOUSLY SICK

=

Fewer of us are choosing natural remedies over prescriptions

DECREASE WAS GREATEST AMONG

ASIAN AMERICANS ▼ **34%**

GEN X ▼ **22%**

HEALTHLINE MEDIA

*B=Boomers, X=Gen X, M= Millennials, Z= Gen Z. For breakdown of the generational age groups, see the last page of this report.

We're confident in our healthcare

Even against a grim backdrop of reduced capacity, access issues and knowledge gaps, trust in healthcare hasn't wavered.

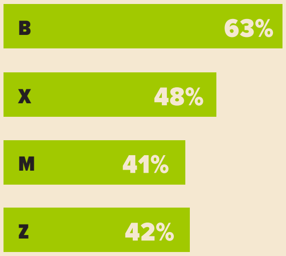
What's behind the lack of confidence?

#1 DRIVER

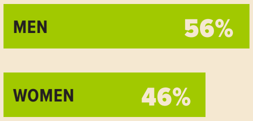
INADEQUATE INSURANCE COVERAGE

Only half of us are confident our health insurance will cover the care we need.

Boomers are more confident than Gen X, Millennials, and Gen Z



Men are more confident than women



THE BIGGEST DROP

LACK OF TRUST IN HEALTHCARE PROVIDERS

▾22%

compared to pre-pandemic

Everyday healthy is the name of the game

We see the importance of living healthy lives day to day, even in quarantine. We're resilient, we're taking charge, and we're embracing change.

1 in 3
of us feels our everyday lifestyle is extremely or very healthy

That's only a 4% decrease from pre-pandemic days!

The Exceptions
People of Asian and Hispanic heritage dropped in how healthy they rate their lifestyle, by 14% and 10% respectively.

We aspire to be our better selves

1 in 3
of us uses our free time to improve our health and wellness

GEN Z IS
25% MORE LIKELY
to use their free time for health improvements now than they were before the pandemic

What's more important?

MARKETER TIP

Health and wellness is having a moment!
Don't underestimate the number of people who are willing to make changes — strike while the iron is hot. Reach them, educate them, and help them.

What keeps us from having a healthy lifestyle?

The biggest obstacle is behavioral

53%
SAY IT'S HARD TO CHANGE HABITS

MARKETER TIP

Address **habit change** in your marketing plans — make it easy for them to make healthy changes. Start small. Understand motivations. Design triggers. Offer a support system. And deliver prompt feedback.

Obstacles to a healthy lifestyle that have changed the most since pre-pandemic:

When it comes to your health, *treat yo'self!*

Food is serious business

The pandemic hasn't stopped us from eating well.

What's most important?

More of us are choosing health over enjoyment when selecting our menus

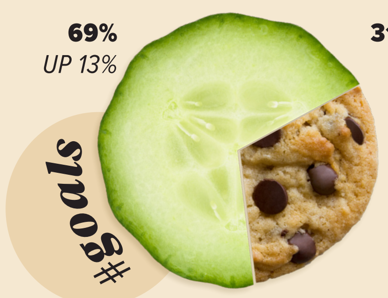
Is it good for me?

65% EAT A HEALTHY DIET

Do I love it?

35% EAT WHAT I ENJOY

GEN X is the most focused on healthy eating



GEN Z is focusing more on enjoyment

We're breaking in our kitchens

ALMOST HALF
of us are cooking more at home and/or indulging our love of cooking and baking

LOVE FOR COOKING AND BAKING HAS GONE

↓ FOR **MILLENNIALS**

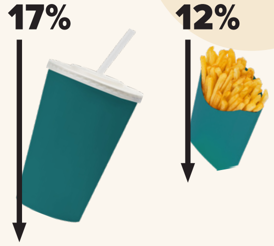
↑ FOR **GEN Z**

Who's making healthier food choices?

29%
of us are consuming an extremely or very healthy diet

Healthy eating FTW

Since pre-pandemic, **men** decreased regular consumption of **sugary drinks** and **fast food**



Organic is more entrenched

27%
of us buy natural or organic foods as much as possible

Not surprisingly, our likelihood to buy natural or organic foods rises with our income:

21%	42%
LESS THAN **$50K**	MORE THAN **$100K**

less than a quarter VS. *almost half!*

BOOMERS are still the least likely to buy organic, but it's trending up

▲**18%** SINCE FEB 2020

Fitting in fitness at home

Despite reduced access to classes and gyms, we're maintaining our habits and attitudes towards exercise.

75%
OF US EXERCISE

48%
EXERCISE REGULARLY

ONLY 41%
OF GEN Z EXERCISE REGULARLY
DOWN 35% VS PRE-PANDEMIC

***GEN Z* is falling behind!**

We need to *sweat it out!*

16%
of us highlighted the inability to take exercise classes or go to the gym as a top source of **pandemic-related anxiety**

Growth mindset

40%
of us are interested in learning more about fitness and exercise

Millennials,
the go-getter generation, lead with **51% INTERESTED**

MARKETER TIP

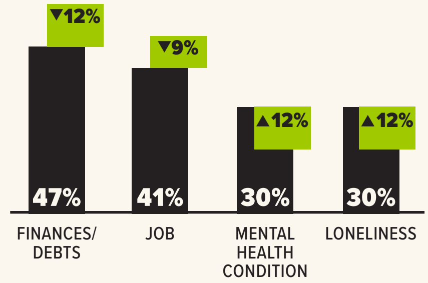
At-home fitness is on the rise, but people still crave the support and guidance of their coaches and trainers. Find ways to **educate** and **inspire.**

Mental health is taking center stage

Our stress levels haven't changed, but the stressors have.

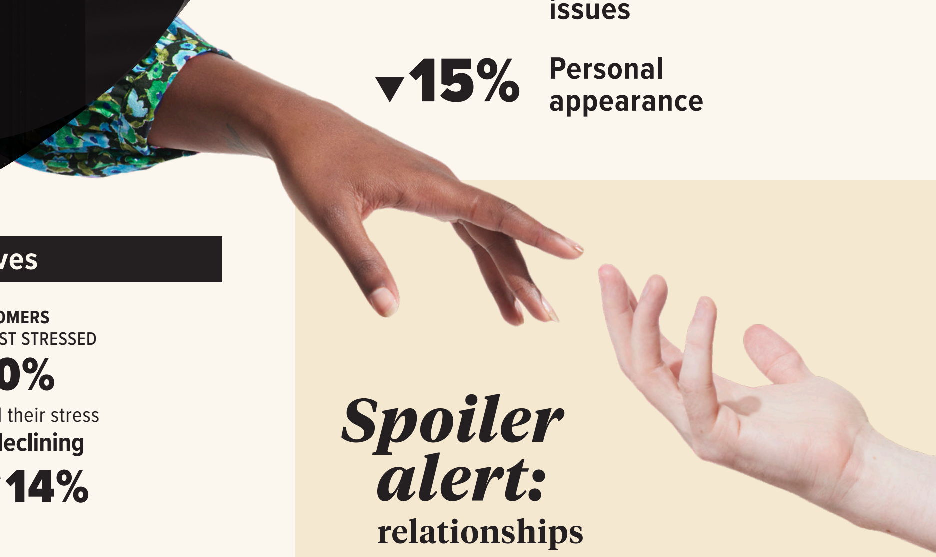
What's driving stress?

The biggest drivers of our stress are still finances and work, but they've both dropped in importance. **(Perhaps working from home is working for us!).** Mental health drivers, on the other hand, have seen a jump since pre-pandemic.



▲39% **Political and environmental issues**

▼15% **Personal appearance**



Stress continues to be a mainstay in our lives

About a quarter of us say we have extremely or very stressful lives

GEN Z
MOST STRESSED
40%
and their stress is **growing**
▲31%

BOOMERS
LEAST STRESSED
10%
and their stress is **declining**
▼14%

The pandemic has led to increased anxiety and depression

CLOSE TO 66% of us say we've felt anxious or depressed as a result of the pandemic

THIS IS HIGHER FOR
GEN Z 84%
MILLENNIALS 79%

Spoiler alert: relationships are complicated

Of those who consider their lives to be stressful... **39%** said **relationships** are the main source of stress BUT, close **relationships with friends and family** are a top priority for **63%** of us.

MARKETER TIP

No matter your category, **make mental health a standard part of your brief.** It will force you to genuinely understand your customer. Without it, you'll hit limits to the health and wellness benefits you can impart.

Health and wellness shopping is alive and well

Since the pandemic started, almost all of us have purchased or are planning to purchase a new health and wellness product.

On the cutting edge

BELIEF

16% of us **believe** we're the first to try new health and wellness products...

... and since the pandemic, **ALMOST 10%** of us **have**.

ACTION

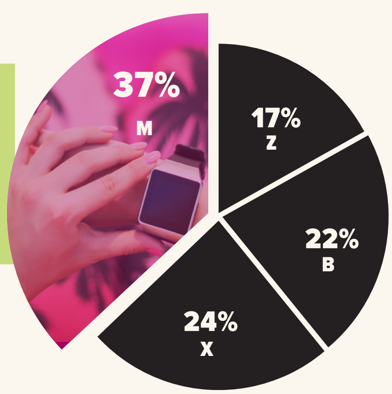
Who *thinks* they're early adopters

23% OF MILLENNIALS

22% OF GEN Z — GEN Z ▲108%

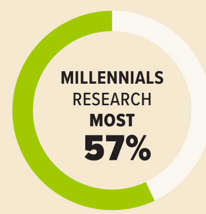
NEARLY 2x MORE MEN THAN WOMEN — MEN ▲34%

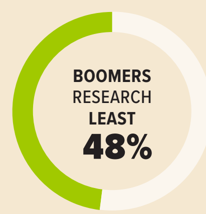
Generational breakdown* of *early adopters*



We do our due diligence

Before buying anything, half of us do a lot of research (checking product reviews, comparing prices, etc.)





MOST IMPROVED

Boomers increased their research efforts **16%** since Feb 2020

What we're buying

Vitamins and skin care products are our most popular purchases, but we're also focused on exercise, sleep and mental health.

66%	Vitamins, minerals and supplements
43%	Skin care products
13%	Fitness equipment
13%	Sleep aids
11%	Counseling or therapy sessions

What's driving our purchase decisions

In addition to price and quality, we're looking for convenience, science, stress relief and ways to give back.

44%	Cheap prices or discounts
44%	High quality products
37%	Easy online ordering
26%	Convenient at-home delivery
25%	Based on scientific research

MARKETER TIP

Science has always been important on the supply side of health businesses, but it's now gaining recognition on the demand side. **Show off your science and your research.** Find a way to make it connect.

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Religion is providing relief

We're using religious and spiritual resources more during the pandemic.

3 in 5
of us have used religious or spiritual resources since the pandemic started

14%
of us are **more focused** on a religious or spiritual practice than before

Black Americans are more likely to have used these resources more often. About half of Black Americans say that prayer is part of their regular lifestyle.

30% of Black Americans are affected by lack of access to worship services

VERSUS

20% of all adults experiencing anxiety or depression during the pandemic

We're focused on the future

2020 has opened our eyes to the impact our choices have on our future health — both physical and mental.

ABOUT 2/3
of us are more concerned with our future health than feeling good today

Worry is one thing... sacrifice is quite another

Are we willing to make the sacrifices today to live a longer life?

BLACK AMERICANS	62%
ASIAN AMERICANS	62%
HISPANIC AMERICANS	60%
WHITE AMERICANS	45%

NON-WHITE POPULATIONS are most willing to trade immediate pleasure for longer-term benefits.

	YES	NO
ALL AGES	49%	51%
GEN Z	40%	60%

GEN Z is focused on living life to the fullest now, and is less likely to make sacrifices for their future selves.

That's a problem for ***Future Me.***

Let's talk about *health*, baby!

Health content is everywhere

And it's here to stay.

Health has permeated our news feeds and daily conversations

79%
of us notice health information in popular media

64%
of us think it's easy to get health information

49%
of us say access to health information makes us feel empowered and in control of our health and well-being

As we learn more about health, we've gotten less skeptical and more curious

▲14%
Want for health and wellness info to be more detailed

▼10%
Skepticism about the information we consume

MARKETER TIP

Ours is a soundbite culture in many ways, but health may be an exception. People are invested deeply in learning more about their health, and deserve more than the topline. **Marketers have an opportunity, even an obligation, to help.**

WHO'S WHO
Defining our generations

Gen Z: 18 - 23 years old
Millennials: 24 - 39 years old
Gen X: 40 - 55 years old
Boomers: 56+ years old

About the study/research

Healthline Media and Shapiro+Raj conducted a two-part online survey, fielding 1,533 respondents in February 2020 and 1,577 respondents in December 2020. The same questions were asked in both surveys, allowing for direct comparison of the results. A few additional questions specific to COVID-19 were included at the end of the December 2020 survey. Data from both studies were weighted to ensure the data is representative of the general U.S. population ages 18+.

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