

STATE OF OUR HEALTH



2022

WHITE PAPERS

Health Engagement through the Pandemic:

Aspiration Becomes Action



MURPHYRESEARCH



Introduction

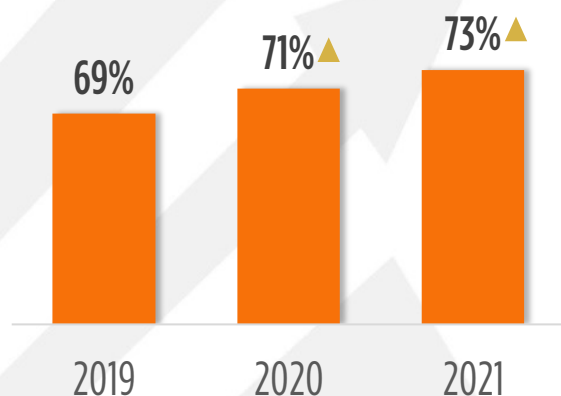
2021 was a roller coaster year in many ways - personally, politically, culturally, pandemically - and all the ups, downs, and barrel rolls were reflected in Americans' engagement with fitness, food, and mindfulness through the year. In many ways, 2021 looks much like 2020, with its unusually high levels of variation in health engagement. In other ways, 2021 is its own beast entirely, growing out of 2020 and showing that many of the trends that Americans developed early in the pandemic are here to stay, with lasting impacts.

In this series of white papers, we explore key trends from 2021 and what they mean for 2022. Here we take a dive into overall health engagement. Did Americans grow more engaged with health during the pandemic? The answer is yes...and no. Let's dive in.

Health engagement moves from aspiration to action...

Engaged with Nutrition*

Among the US general population aged 13+



Despite the many challenges of the pandemic, a propensity toward healthy eating that began in 2020 has continued to grow.

Since 2019, nutrition engagement has increased from 69% of the population to 73%.

This small but significant difference equates to approximately 11.9 million more Americans engaged with healthy eating now than 2 years ago.

▲ ▼ Arrows indicate statistically significant differences from previous year at 95% confidence level

* Nutrition engagement is defined as those who report doing at least one of the following activities at least weekly: keep a log of food intake, take vitamins, minerals, or supplements, use a smartphone app to track diet, talk to friends/family/doctors about diet, follow a specific diet, or read health food/healthy lifestyle content.

Fitness engagement is defined as those who report doing at least one of the following activities at least weekly: exercise, wear a fitness tracker, or use a smartphone app to track physical activity

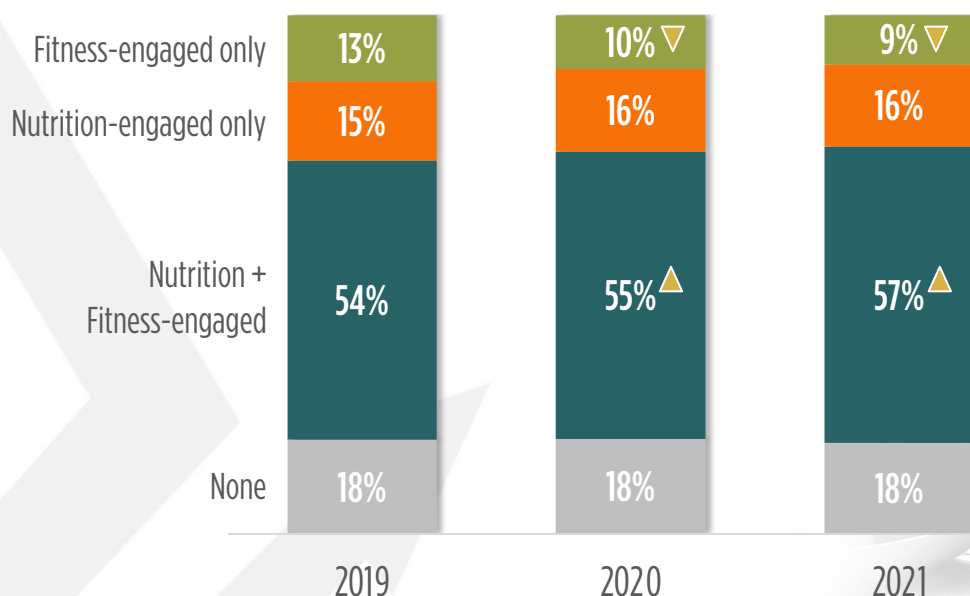
Base: Total Screens/US Gen Pop - 2019 (n=13,517), 2020 (n=15,915), 2021 (n=15,692)

Note: For methodological consistency, 2019 data includes Q2-Q4.

...but only among those who already cared

But diet isn't the whole story. These newly nutrition-conscious consumers were already exercisers, meaning more Americans moved from being solely concerned about fitness to engaging with both exercise and diet. In other words, consumers who were already engaged with health have become even more engaged, turning aspirations into real action.

Nutrition & Fitness Engagement* Among the US general population aged 13+



However, the number of Americans who are unengaged with fitness or nutrition remains stubbornly stable at 18%, the same as 2020 and 2019. If a global pandemic can't push these consumers to think about their health, it's not clear what will.

▲ ▽ Arrows indicate statistically significant differences from previous year at 95% confidence level

* Nutrition engagement is defined as those who report doing at least one of the following activities at least weekly: keep a log of food intake, take vitamins, minerals, or supplements, use a smartphone app to track diet, talk to friends/family/doctors about diet, follow a specific diet, or read health food/healthy lifestyle content. Fitness engagement is defined as those who report doing at least one of the following activities at least weekly: exercise, wear a fitness tracker, or use a smartphone app to track physical activity

Base: Total Screens/US Gen Pop - 2019 (n=13,517), 2020 (n=15,915), 2021 (n=15,692)
Note: For methodological consistency, 2019 data includes Q2-Q4.

This trend suggests that although the total health and wellness market size has not changed, the level of investment consumers are willing to put in has grown. Specifically, the pandemic may have a long-term upside in well-established nutrition habits that consumers can reliably turn to for a healthier population in the future.

In both qualitative and quantitative data, we have found that when consumers combine nutrition and fitness engagement, they often become more engaged in both areas. Fitness habits support nutrition goals, and nutrition habits support fitness goals in a virtuous cycle.

This trend is thus very positive news for health-focused brands in both these spaces. Having spent the past two years investing in better health, consumers are coming into 2022 ready not just to maintain that investment, but quite possibly grow it even further.



State of Our Health is *the* standard reference point for uncovering the underlying truths and trends that propel food and fitness attitudes and behaviors. It is the largest and most comprehensive U.S. food, fitness, and mindfulness tracker, offering an unparalleled depth and breadth of data informing exceptionally clear insights into almost every facet of American health and wellness.

State of Our Health is a subscription-based service. Contact us to learn about how State of Our Health can benefit your business.

STATE OF OUR HEALTH METHODOLOGY

QUANTITATIVE

Online survey, fielded continuously since 2018

- 1,000 completes per month; 12,000 per year
- U.S. teens and adults aged 13+
- National sample, rep to U.S. Census balance on age, gender, household income, race, ethnicity, and region
- Continuous data collection since 2018

QUALITATIVE

Quarterly qualitative supplements

- Methods vary by topic, including in-depth interviews, online bulletin boards, multi-day diaries, etc.
- National sample, mix of key demographics and health attitudes, approaches, and activities
- Topics vary by quarter

About Murphy Research

Murphy Research is a full-service market research firm that understands that groundbreaking research lies at the intersection of science and creativity. We are known for our innovative research design, rigorous execution and enduring insights, and offer quantitative and qualitative services to help clients with market assessment, brand strategy, product development, customer loyalty and engagement, and communications research.

We have done cutting edge work with companies like Disney, Twitter, PepsiCo, AT&T, and Allstate, as well as many other Fortune 500 and emerging companies in technology, CPG, retail, media, communication, and financial services.

For more information, contact:

Sarah Marion, Ph.D. | Director of Syndicated Research

smarion@murphyresearch.com | 812.272.0022

<https://murphyresearch.com/syndicated/state-of-our-health>



MURPHY
RESEARCH