

2022 Digital Wellness Trend Report

Prepared by **Digital Caliente**



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Digital Wellness in the Information Age

In this unique time when consumers and businesses alike find themselves at the intersection of a pandemic and the Information Age, finding ways to stay healthy—physically, mentally, and in other areas—while staying informed has been a challenge. Moreover, we're in a relatively new era when people spend perhaps half or more of their day on the Internet or otherwise tech-based work, entertainment, or management platforms. With remote-work environments now more common than ever, this phenomenon has only increased. In this report, we will examine how digital wellness has emerged and how it is evolving as a consumer service industry as well as an important part of life for most humans.

Digital wellness includes taking control of your virtual life. It also means using technology to improve your life offline.

As consumers seek solutions for mental and physical health, wellness tracking, productivity, and overall well-being, brands have an opportunity to innovate and provide services in these areas for their audiences and employees alike.

Trend v. Shift

Although we're calling this a Trend Report, it's important to note that the digital wellness trend could more accurately be described as a behavioral shift. The Internet and everyday technology are not going anywhere, and the human relationship with digital platforms will continue to evolve along with technology.

What Is Digital Wellness?

The University of Washington describes it as “Taking Control of Your Life Online.”

Digital wellness (also known as digital well-being or digital health) is the pursuit of an intentional and healthy relationship with technology in the workplace and in personal life. Now that many jobs and everyday activities rely on the Internet and digital devices, the goal of digital wellness is for the user experience of these technologies to promote healthy usage habits and assist the user in maintaining a healthy lifestyle.

Examples of Digital Wellness Technology

- Mobile applications
- Online fitness and wellness programs
- Smart home gyms
- Smartwatches and other wearable devices
- Biotechnology equipment
- Telehealth services
- Health and wellness-based social media
- Online communities and forums

Precedence Research projected that the global digital health market will see a compound annual growth rate (CAGR) of 27.9% from 2020 to 2027, reaching \$833.44 billion. According to the Ottawa-based market research firm, a jump in the number of healthcare apps is fueling this growth.

Areas of Individual Wellness

While some or much of digital wellness technology does focus on physical health, there are several areas of wellness to consider for all humans. Digital wellness means different things to each individual as they use a variety of platforms to improve their lives and tackle personal challenges, both online and off.

Examples of Individual Wellness:

- Physical health
- Mental/emotional health
- Intellectual stimulation
- Relationships and social life
- Spiritual wellness
- Financial health
- Environmental wellness

Taking Digital Wellness Offline

The increased exposure to virtual platforms rose in 2020 as COVID-19 ravaged the globe, with more classes, work environments, and events moving to online models to promote social distancing. Consequently, consumers stuck at home worldwide spent twice as much time consuming digital content in 2020 than they did in 2019, according to Forbes. And as multiple studies have concluded that spending more time online can lead to higher levels of anxiety, depression, and other mental health issues, it's no surprise that reports of these have increased, as well. As a result, much of the digital wellness experience for consumers has instead shifted toward helping them spend less time online.

These digital well-being apps encourage users to be aware of their relationship with technology and offer tools and tips to help users use digital technology more deliberately. These technologies might include:

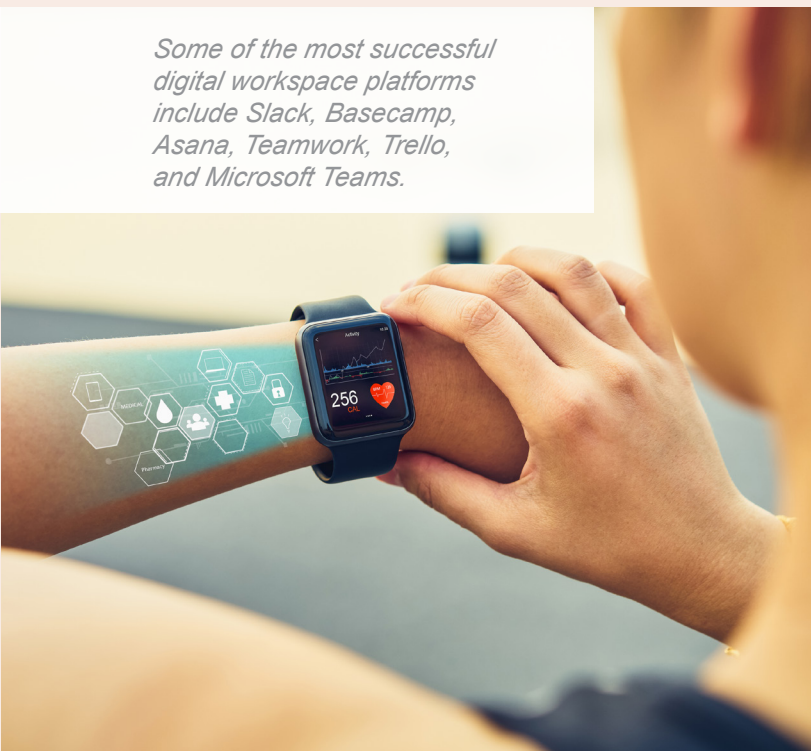
- Screen time limits
- Productivity monitoring
- Tools for increasing focus
- Movement tracking and reminders
- Do not disturb features

Workforce digital wellness tools: Some technologies focus on improving the employee experience inside a digital workspace.* These digital wellness tools include automation and micro-apps that eliminate the distraction of routine approval tasks and calendar RSVPs.

**digital workspace | noun*

: A digital workspace is an integrated technology framework designed to deliver and manage app, data, and desktop delivery. It allows employees to access their apps and data in real-time—on any device, from any location, regardless of whether the information is stored through cloud services or in the data center. The most successful workspace solutions provide a unified, contextual, and secure experience for IT and end-users. (Source: Citrix Systems)

Some of the most successful digital workspace platforms include Slack, Basecamp, Asana, Teamwork, Trello, and Microsoft Teams.



Wellness as a Consumer Service

The Fitness Craze is nothing new. According to the Oxford Companion to United States History, the 1970s and 1980s “saw a great increase in cycling and jogging, exercising at health clubs, and even marathoning, which was sponsored by hundreds of cities. Entries in the New York City Marathon rose from 126 in 1972 to over 20,000 in the mid-1980s.”

But as the ways in which humans interact, work, play, and exercise have evolved, so too has wellness as a consumer service in the individual well-being categories we previously discussed.

Physical Health

Much like the fitness industry boomed in the 1980s, there has been a dramatic increase in the population’s interest and engagement in physical health. Digital-based fitness services such as Peloton, Tonal, Tempo, Mirror by lululemon, and Beachbody have boomed as the coronavirus pandemic has not only made people more concerned about their physical activity but also kept them home more, presenting the opportunity for these types of smart home-gym systems to take off more than ever before.

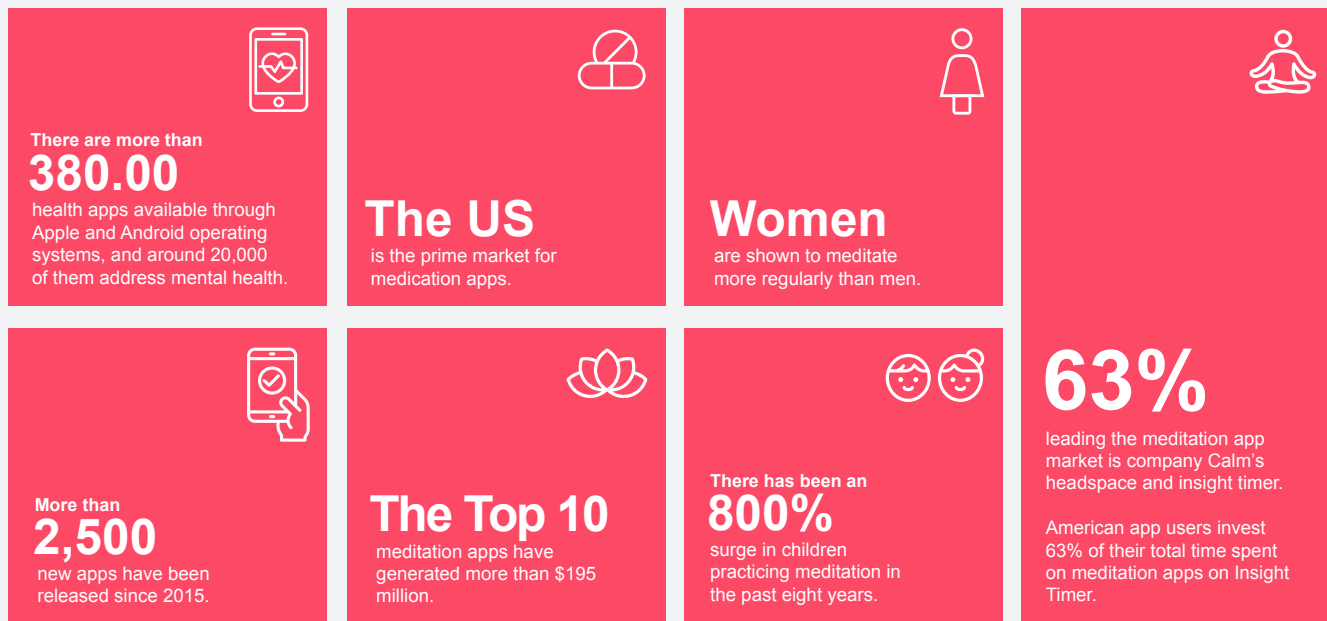
Peloton’s stock soared from around \$28 in January of 2020 to its all-time high of nearly \$163 at the end of the year, and it’s still holding at about 350% of its price from November 2019, as of November 4, 2021. The brand released a range of products during that time to broaden its audiences through different price points and programming, invested in shipping solutions and additional manufacturing locations to keep up with demand, expanded its New York City studio-gym locations and planned new ones, and focused heavily on premium content creation that would solidify Peloton as more than a fitness routine—it evolved into an entertainment platform.

Fitness as Digital Entertainment: The pandemic also created “a captive audience and, for Peloton, a lucrative one, with total workouts growing to 171 million in the last quarter from 48 million a year earlier. Some of the people trapped at home were agents and execs, eager to make deals. ESPN brass reached out early in the pandemic to say they were all riding. They proposed an ESPN All-Star Ride, which came together quickly in May 2020.” (Source: *Hollywood Reporter*)

Peloton content started featuring celebrity trainers, participants, and even hit music in promotional materials and workouts, which built a cultural following around the Peloton brand as the new cool way to workout. Plans to introduce an on-bike video game called Lanebreak in early 2022 will push its entertainment factor to another level by creating a completely virtual experience. Riders will strive to match and sustain their resistance and cadence while facing obstacles set to music. Think Beat Saber on wheels!

Fitness and nutrition brand Beachbody saw online subscriber growth of more than 300% during the coronavirus shutdown, signing up nearly 500,000 new subscribers during that period, according to the Los Angeles Business Journal. “We started to see people who were gym orphans wanting to find an alternative,” said Beachbody CEO Carl Daikeler. “You can’t find dumbbells online or in stores right now, but we’ve got (programs) that give you a pretty intense body workout without needing dumbbells.” The company joined the NYSE in summer 2021 as a publicly-traded entity and has since added the MYX Bike and BODinteractive live workouts to its at-home fitness repertoire, directly competing with Peloton by leveraging its huge user base and celebrity “super trainers,” including Autumn Calabrese, Amoila Cesar, Joel Freeman, and more. It all goes back to taking control of your life: “Where normally we might be about helping people lose weight for spring break or to prepare for summer, instead

Stats on Digital Mental Health Platforms



what we were hearing was, people just wanted to have control of something. And the two things they could control were activity level and the things they put into their mouths," Daikeler said in May 2020.

Mental/Emotional Health

Measuring well-being, wellness, and happiness is becoming more and more relevant because it is a better personal, social, professional, and economic indicator for society as a whole, especially in the wake of a global pandemic and during times with such cultural, environmental, political, and social unrest. Digital wellness can provide the next frontier of health for a community, nation, company, or individual, turning well-being-as-a-Service (WaaS) into the new It Girl.

Digital wellness tools for measuring and improving mental and emotional well-being include telehealth therapy options, support groups, and mobile apps. Instructions on meditation and guided daily routines help you take control of your mental and physical health and turn goals into entertainment, as seen with the app Fabulous.

The success of digital mental health startups means that more people can access mental wellness than were potentially able to do so before. As the stigma

surrounding mental health discussions decreases and the call for better mental and emotional health practices gets louder due to increased technology use, no doubt this particular branch of digital wellness will drastically evolve within the next few years.

Intellectual Stimulation

Intellectual wellness is defined as recognizing one's creative abilities and finding ways to expand knowledge and skills. Many of these have taken the form of gaming-based mobile apps or websites, which keep users engaged while stimulating the mind and offering a way to gauge results through scores, level-ups, and competition with friends.

Lumosity is one of the most established brain training and mental fitness programs, with both a website and mobile app for access. A free user account includes a pass to play three games per day, while the paid subscription service has more offerings. Users keep track of their results and improvement from games, tests, and activities, all backed by science. "In one study, our scientists conducted a randomized trial involving 4,715 participants in order to study whether cognitive performance improves after training with Lumosity," the brand's website states. "The test group

trained with Lumosity, while the control group trained using crossword puzzles. Both groups trained five days per week, for fifteen minutes a day. After ten weeks, the Lumosity group improved more than twice as much as the control group did and showed statistically significant improvements on subtests of working memory, arithmetic reasoning, and processing speed.”

Lumosity also has a meditation and mindfulness app called Lumosity Mind, bringing together mental/emotional health and intellectual wellness for its users.

Some other examples of mobile apps for promoting intellectual wellness include: TED, Weird but True, Words with Friends, Vocabador, Draw Something, Sketchbook, Star Walk, Duolingo, and more.

This TEDx Talk with Michael Ebinger, the director of the Washington State University Center for Innovation, highlights “The Importance of Developing Intellectual Wellness”—while demonstrating a perfect example of achieving that intellectual wellness through a digital platform.

 [Go to Video: Developing Intellectual Wellness. Michael Ebinger | TEDxSpokane](#)

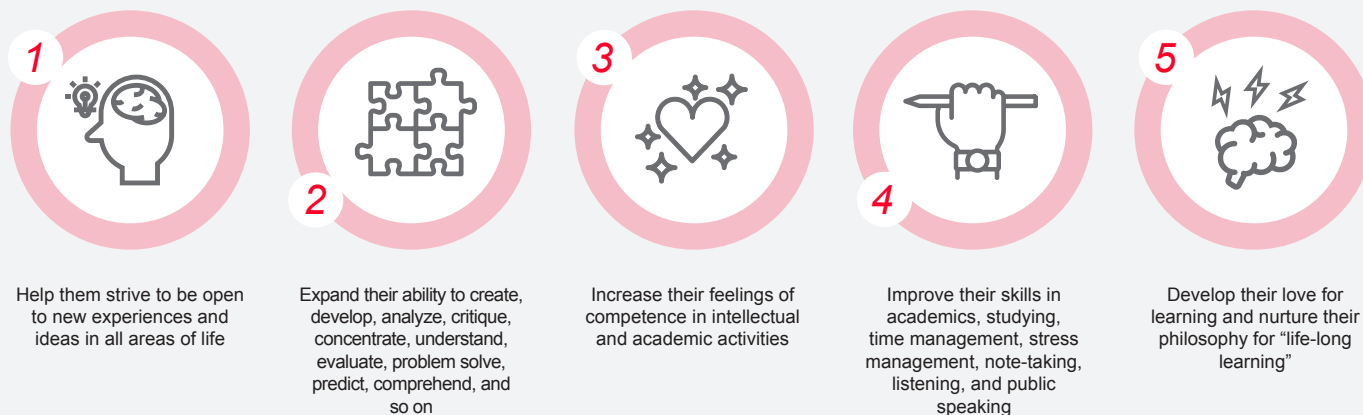
Environmental Wellness

Environmental wellness refers to your sense of safety, comfort, and connection with your physical surroundings. Wellness in this domain begins in your immediate surroundings. Your personal space has a direct impact on your state of mind, emotional well-being, and productivity.

Your environment directly impacts your emotions, physical reactions and comfort, health, and more. Environment wellness through digital platforms includes not only online tools for creating a more peaceful or ideal environment but also digital products and tools to help improve your home or office environment. Marrying the two can bring harmony and control to your life both online and off.

Smart House: The global smart home market is projected to grow from \$84.5 billion in 2021, reaching around \$138.9 billion by 2026—a compound annual growth rate of 10.4% in that time frame. *(Source: BusinessWire)* While smart home systems like Amazon’s Alexa, Google Home, HomeKit, and SmartThings offer total home monitoring software and devices that can control everything from music and lights to thermostats and security, other brands are focusing on niche products to capitalize on one area of environmental wellness.

Digital wellness platforms for intellectual stimulation might provide these services for consumers:



A fun example is mattress brand Casper, a 2014 startup that has since blossomed into a publicly-traded leader in sleep technology thanks to its consumer-driven focus on “sleep culture.” Casper’s primary audience was already online, as the brand’s innovative vacuum-sealed mattress-in-a-box model is what launched its success. Now it’s turning to artificial intelligence to reach consumers and help them sleep better with the Insomnobot3000. Described as “A friendly, easily distracted bot designed to keep you company when you just can’t fall asleep. Extra chatty between 11 pm–5 am,” Insomnobot is bringing a personal touch to Casper’s customers even when “the Best Bed for Better Sleep” just isn’t working. One only has to text Insomnobot for a chat.

“We wanted to make a bot that made 3 am a little less lonely,” said Casper’s head of communications, Lindsay Kaplan. According to Inc., Casper used old-school AOL Instant Messenger chatbots as inspiration, undergoing rounds of internal and consumer research tests to improve upon the bot’s believability, knowledge base, and response variables. The result is what they call a “universally friendly” pal that can talk about virtually anything—and a unique, innovative data collection tool that provides Casper with individualized research from their most valued consumers.

Digital Wellness Tools at Home:

- Air purifiers
- Smart light bulbs
- Adjustable beds and other furniture
- Smart home systems and appliances
- Security systems
- Integrated sound systems
- Noise-controlling headphones
- Blue-light glasses

Digital Wellness Tools online:

- Digital well-being tools (ex. Google well-being)
- Screen time limiting tools (ex. Apple Screen Time)
- Focus habit trackers (ex. Flora)
- Focus and study timers (ex. Flipd)
- Scheduling breaks and movement (ex. Desktime)
- A.I. technology (ex. Casper Insomnobot3000)

Relationships and Social Life

Social connection is fundamental to humans. In addition, social connectedness also enhances mental well-being. The COVID-19 pandemic has imposed



digital platforms as the only means for some people to maintain a socio-emotional connection. Even as the world reopens and in-person events and social engagement become the norm again, new technology still influences how people use digital devices to maintain—or avoid—social relations or how much time to spend on virtual social connectedness.

Aside from social media platforms, dating and friendship apps are on the rise, with leaders including Hinge, Tinder, Bumble, and Wink. There are also hyper-personalized versions, such as Hey!Vina for women seeking friends and Peanut, for women but focusing on finding friends who are at the same stage of life and therefore more likely to make a deeper connection.

The Detriments of Social Media: According to the Pew Research Center, 69% of adults and 81% of teens in the US use social media. According to many organizations, this puts a large amount of the population at an increased risk of feeling stressed, unhappy, or ill over their social media use. The McLean Hospital, a Harvard affiliate that focuses on mental health, stated, “Social media has a reinforcing nature. Using it activates the brain’s reward center by releasing dopamine, a feel-good chemical linked to pleasurable activities such as sex, food, and social interaction. The platforms are designed to be addictive and are associated with anxiety, depression, and even physical ailments.”

McLean Hospital goes on to cite a 2018 British study that tied social media use to decreased, disrupted, and delayed sleep, which is associated with depression, memory loss, and poor academic performance. “Social media use can affect users’ physical health even more directly. Researchers know the connection between the mind and the gut can turn anxiety and depression into nausea, headaches, muscle tension, and tremors.”

From increased bullying to inducing FOMO or actual physical illnesses, it's clear social media's downfalls might outweigh the reward for some users. Still, it can also help foster meaningful connections and build communities. The jury's still out on what will happen for the future of sites like Facebook, Instagram, Twitter, and more.

Spiritual and Religious Wellness

Spirituality means different things to different people, just as wellness does, and it's clear that the two are inextricably linked no matter how you define them. Humans possess an innate need for purpose, inner peace, and self-knowledge. Some seek this inwardly or by connecting with nature, the cosmos, people, or other physically present entities. Others turn to organized religion and similar groups for guidance and community in their spiritual journey.

The Quantified Self: Digital wellness technology has evolved in such a way that many apps and tools aim to provide self-knowledge and achieve personal wellness goals through tracking and quantified data. The term "quantified self" is believed to have been coined by Wired magazine editors Gary Wolf and Kevin Kelly in 2007 with the meaning "a collaboration of users and tool makers who share an interest in self-knowledge through self-tracking." Today, digital tools allow people to track nutrition and weight, blood sugar, mental health patterns, emotional triggers, stress, and so much more. Using numbers and data to help people take control of their lives is an ultimate example of how digital wellness has evolved for today's consumers.

GPS-led running and cycling app Strava has been in the game of helping users achieve their quantified goals since 2009 and, according to Guardian, bills itself as the number one mobile app for endurance athletes who run and cycle. Its social networking features allow users to share their daily activities, creating friendly competition and sharing achievements among friends, with the option to give someone "kudos" on their activity. Popular vegan ultra-endurance athlete, author, motivational speaker, and podcaster Rich Roll shared what he believes is the crux of Strava's success—connection: "There's something uniquely special about being privy to the daily grind of my favorite multi-sport athletes. Their transparency holds me accountable. In turn, I help hold my community accountable. And openly sharing our collective fitness experience—the highs and the lows—makes all of us better." (Source: Guardian)

Strava syncs with wearable fit-tech like Garmin and Google Fit, while other brands utilize a different approach—creating their own wearables and

corresponding apps. Take Oura Ring, for example. This smart ring tracks sleep, physical activity, heart rate, body temperature, blood oxygen levels, and more. Marketed as more sensitive and accurate than competitors like Fitbit and Apple, Oura Ring saw sales of about \$30 million in 2019, per a regulatory filing in Finland, and doubled that in 2020. Most recently, it raised \$100 million in a Series C funding campaign with the goal of undergoing R&D for new product features and models. During COVID lockdowns, Oura worked directly with coaches and players in the NBA, NASCAR, Formula One Racing, UFC, and more to provide rings that could monitor players' health and help alert them of illness. Once players began to see the value in the data collected by the ring, they also used it to track performance, such as the relation between sleep and recovery. (Source: Forbes) During one of our agency's recent focus groups, a participant even claimed her Oura ring predicted she was pregnant before she thought to take a test.

According to the World Health Organization, spiritual health is finding gratitude in one's circumstances, consciously exploring the meaning of life, and connecting with oneself, others, and nature. When we are tech-intentional, we use technology to our advantage, support our spiritual health and well-being, and achieve digital wellness.

Financial Health

"The bottom line is that 56% of American consumers are not fully financially healthy, citing varying degrees of financial stress and vulnerability that range from struggles with credit and with building a savings reserve to severe difficulties paying their daily bills," a JD Power Insight report states. 44% of respondents say this stress has been growing—not surprising considering that 38% report their household income has declined by 25% since the pandemic began. (Source: The Financial Brand)

Financial technology (or fintech) development has mushroomed over the past decade, from online banking and investments to credit tracking, education, payment portals, budgeting, cryptocurrency, and more. These tools help users take control of their finances right from their smartphone or other devices, providing an invaluable service for meeting their overall personal wellness goals.

App examples: WebMoney, Mint, Truebill, Financial Gym.



The Fintech Gap: Unfortunately, not everyone has access to or approval to use digital finance tools. “Access to electronic financial services, in particular digital money, has replaced the digital divide as an unintended yet significant barrier for low-income individuals to participate in new technologies, including those that lead to better health outcomes,” warns the Brookings Institution. “Digital money is an underappreciated vector by which technological innovation, both financial and non-financial, can be hindered in reaching certain populations. Accessing digital money is easy and free for those with money while for those without a lot of money, digital money is expensive.”

We expect fintech to address such concerns in the near future and for innovators to jump on the opportunity to create new policies and platforms that will provide more inclusive access to digital finances, subsequently improving the financial and overall wellness of more individuals and families.



Branding Digital Wellness

How can brands examine the consumer shift toward digital wellness and see it as an opportunity for new strategies and services? Start with the consumer.

We've surmised that consumers are looking for:

- Ways to take control of their lives online and off
- Digital workspace programs with great productivity tools
- Convenient health and fitness tools they can use at home
- Simple tools for meditation and mental health tracking
- Intellectual stimulation and learning
- An ideal working and living environment
- Healthy social and romantic relationships
- Self-knowledge and spiritual growth
- Control of their finances and access to financial services
- An overall sense of well-being and security

Almost any brand of any size or industry can provide assistance in at least one of these areas. The key is to think creatively about how to better serve consumers through digital wellness.

It might be as simple as sharing tips about nutrition on your website or social media account. Perhaps you can offer intellectual stimulation by sending a weekly trivia question in your email newsletter. On an even more basic level, it could be shown through your brand voice and tone; how you communicate and connect with your consumers. Talk to them one-on-one to find out how you can help and open a channel for dialogue about services. Hearing directly from your customers and target audience and responding in kind is always the best way to build brand trust, awareness, and loyalty and continue its growth.

And when your consumers are well, your brand will be, too.

Big-name brands are already moving their feet to tap into the digital wellness market. Airbnb recently introduced Airbnb Animal Experiences, a new offering (Animal Therapy) in response to the increasing demand for a solution to reduce anxiety and stress in our society.

But Airbnb is not alone; many other companies in the hospitality business are launching startups to explore the market of “Transformative Travels” and have a presence, such as Pravassa and Good Escapes.

Apple is increasing its presence in the personal health and wellness space through new sensors such as the Apple Watch's breath tracking and the new Health App features (menstrual cycle tracking and environmental noise level tracking).



Apple also acquired seven startups with healthcare solutions in 2019 alone.

In November 2019, Google acquired Fitbit for \$2.1 billion, an iconic product company with tremendous brand equity in the US, defining where the market interest is right now. *(Source: Medium – Well-being: The Next Disrupted Industry by Tech)*

Digital Wellness and Corporate Social Responsibility

According to a recent Gallup poll, 96% of people see a direct correlation between well-being, performance, and life success. In turn, more businesses recognize the stats and are putting employee well-being at the heart of their budget. Companies with highly engaged employees saw a 41% reduction in absenteeism alongside a 17% increase in productivity.

The Burnout Factor: Burnout—aka the emotional, physical, and mental exhaustion caused by excessive and prolonged stress—occurs when employees feel overwhelmed, emotionally drained, and unable to meet constant demands. And according to the Harvard Business Review, it is becoming too expensive to ignore: it accounts for \$125–\$190 billion in healthcare costs yearly, a figure that is set to rise.

Including emphasis on employee wellness—digital and overall—in HR plans and company policy will help businesses avoid employee burnout, retain a more robust workforce, and increase loyalty among team members. Digital wellness should be taken into account as part of any corporate social responsibility initiative, pertaining to both employees and consumers.

Provide Employees with Tools for Overall Wellness:

- Insurance options
- Mentorship
- Financial advice
- Fitness and nutrition plans or services
- Time off
- Mental health breaks
- Positive work environment
- Flexibility for remote working and travel
- Social activism and volunteer opportunities
- Team-building opportunities
- Communication and transparency

Tools for Employee Digital Wellness:

- Mobile apps for HR—payroll, benefits, time off, and more (ex. Gusto)
- Good project management software (ex. Basecamp, Slack, Teamwork)
- Screen time awareness
- Blue-light glasses
- Standing desks, comfortable seating
- Company email newsletter
- Social media engagement/recognition

Digital wellness is still evolving and will continue to do so for the foreseeable future, so we really don't know what's going to happen in this exciting and multifaceted market. Humanity's shifted interests toward overall wellness, health, fitness, and self-knowledge open a world of near-infinite possibilities for brands looking to innovate and provide better service to their consumers and employees alike. As technology advances, so will this fast-moving service, but people will always be at its heart. If brands remember that as they seek to create new avenues for digital and overall wellness, the sky's the limit.

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