

The Future of Our Wellbeing

In my decades working with talented teams to provide immersive wellness experiences, I noticed the stories, places, and tools change but the impact remains - ***inspiring people to make healthier choices***. There's the mother who shared how our nurturing staff and beautiful setting allowed her to, "finally feel myself breathe a full cleansing breath for the first time in 9-months," after the devastating loss of her son to cancer. Or the executive who worked with our exercise physiologist and used data from his wearable to track and improve his sleep, heart rate, oxygen levels and overall conditioning after being sedentary for almost two years. Another instance is the person working with a medical, fitness and nutrition team for 30-days to improve his diet, fitness, weight, and stress management lowering certain biomarkers and putting in remission a diagnosis of Diabetes 2 that had occurred a month earlier ⁽¹⁾. Coming to us fearful and leaving hopeful and empowered, I recall a guest who experienced emotional trauma learning to incorporate meditation, bio-feedback techniques, better nutrition, and new sleeping rituals to help regain what she termed, "practical daily function and better centeredness" ⁽²⁾. Lastly, there was a woman who broke down on the massage table after reconstructive breast cancer surgery months earlier. Feeling comfortable enough with her therapist to have a cathartic, healing moment. Each of these, and many like them, are what my mentor, Mel Zuckerman would call "an Aha-moment."

With half of all US consumers reporting wellness as a top priority in their day-to-day lives ⁽³⁾ and 79% saying emotional or mental health is a public emergency ⁽⁴⁾, tools to achieve greater wellbeing is ubiquitous in every aspect of our life and generating trillions of dollars' worth of discretionary spending.

Today with the growing access of information through technology, and health data flowing into the wellness space the leisure 'wellness' business is evolving into a more comprehensive, larger lifestyle category, known as 'wellbeing.' ***The equilibrium of our industry is no longer solely embedded in the leisure travel and spa space but found at the point of concurrency where wellness, technology, and healthcare overlap.*** Make no mistake, high touch leisure platforms are still great distribution channels for our deep experiential programs and to collect data, but we need to elevate the wellbeing business position to be able to scale, aggregate and interpret data and compete.

Understanding how the wellness business evolved into the rapidly changing, complex industry found today and the opportunities before us are paramount for setting a strategic course forward.

The history of the modern wellness industry goes back over a half-century and developed in four distinct phases (Cottage Industry, Productization, Science, and Data and Technology) with each advancing our personal, communal, and environmental wellbeing to varying degrees and shaping the industry. Often operating concurrently or within overlapping business areas these phases are morphing into one mega-category.

In the mid-twentieth century a counter-cultural, cottage industry emerged with its founders blending ancient healing traditions with best-practices to build a healthier lifestyle for themselves and guests. These mission-driven groups reminded us of the ***interconnectivity of the 'whole-self'*** (mind, body, and spirit) and the important relationship the individual has with their community and natural environment. These small business owners were the forerunners of today's wellbeing or wellness-lifestyle industry comprised of a plethora of businesses with numerous technologies, products, claims and distribution channels. This initial phase is the **Cottage Industry**.

The Cottage Industry emerged during the societal transition from ⁽⁵⁾ Modern to Post-Modern reacting to impersonal, industrial and specialization that left some feeling disconnected and skeptical. And, with books such as the Silent Spring ⁽⁶⁾ and the formation of the US Environmental Protection Agency, a growing awareness of environmental health was occurring simultaneously. [Interestingly, 60-years after the publication of the Silent Spring, 80% of today's wellness consumers identify with and support sustainability practices. ⁽⁷⁾]

These founders used intuition and trial-and-error to develop spa, movement, nutrition and later, working with physicians, some preventive health programs. Over time these immersion resorts and retreats became centers for experimentation, innovation and thought leadership for a movement. Theirs was a relationship-based, high touch approach and little did they realize the industry stood at the cusp of the Baby Boomer fitness and self-improvement craze. The market was about to explode.

The second phase is the **Productization** of wellness in which hotels, product companies and authors, etc., incorporated wellness teaching, language, or programs to expand their customer base and grow revenue. ***Wellness was the means not the end***. This was the private sector responding to the growing consumer demand for wellness programs, products, and information by moving the informal Cottage Industry into the business of wellness. Companies raced to get into the space and offered a spectrum of choices, but the information and reliability of the science, products and treatments varied significantly. This market confusion left consumers resigned to do their own research, trial-and-error vetting, or find a trusted wellness company, doctor, or other "expert" to rely on for guidance, with mixed results.

Next is the **Science** phase in which doctors and scientists sought to ***alleviate the consumer's confusion and product misinformation*** by providing evidenced-based health and wellness data by utilizing established research practices and scoping reviews from credible health studies. The infusion of this scientific efficacy coincided with the public's heightened awareness of how our lifestyle (e.g., nutrition, movement, stress, and environment) influences disease (obesity, diabetes, heart disease, hyper-tension, certain cancers, etc.) ⁽⁸⁾. The rigor of scientific methodology provided reliable guidance, greater objectivity and a common language for research, debate, and product claims - something that was sorely needed in the wellness industry. Most doctors agreed on the fundamental science but their reliance on qualitative and quantitative health data varied when reaching conclusions and making healthier lifestyle

recommendations ⁽⁹⁾. I'd hypothesize, scientific quantification is important but not everything. Science can often measure a person's response to human interaction through chemical changes or tracking their heart rate, perspiration, dopamine, testosterone, estrogen, serotonin, and norepinephrine hormones but can't measure love. Yet, both the qualitative and quantitative realities exist.

The latest phase is **Data and Technology** that has provided tremendous access to information, offers great promise, and requires caution. This phase introduced ***a new generation of talented people seeking to disrupt, connect and reinvent industries***. The goal of having the Internet of Things (IoT) to provide enough timely mega-data connecting the physical and digital world to improve predictive decision making and provide actionable steps ⁽¹²⁾ ("metaverse") is exciting! Improvements in wireless sensors and thermal cameras, AI machine learning, robotics, data gamification, acceptance of wearables by consumers and continual data connectivity within the fitness and healthcare industries (among others) are providing information about how people live. This data allows us to build predictable patterns to improve one's wellbeing. For example, by collecting a small sampling of health data from a self-selected group using wearables and comparing it with the objective scientific literature derived from larger independent controlled studies we surmised our wellness program appeared reliable and could benefit our customers.

The speed and scale of technology is impressive, with health and fitness wearables growing at a 14% CAGR to \$392 Billion by 2030. Apple, the world's largest tech company is making a strong stand on health and wellness ⁽¹³⁾. Morgan Stanley predicts ⁽¹⁴⁾ Apple healthcare (with wearable data, smartphones apps, and health and insurance partnerships) could grow to \$313 Billion by 2027. Oracles' recent acquisition of the second largest electronic health records company, and Amazon's and Googles' foray into the industry suggests Big Tech could dominate the wellness lifestyle industry. Medical institutions have been early adopters of scientific data and technology, and now many are also exploring the next generation of personalized self-learning AI health algorithms. For example, one medical institution is using AI to track patients' clinical and behavioral data streams to 'bend the risk curve' and 'nudge' people into healthier lifestyle compliance ⁽¹⁵⁾.

Wellbeing is defined as the interplay between our *objective* health condition and biomarkers, and *subjective* emotional state of mind - data and feelings. Consumers overwhelmingly measure their wellbeing by how, "*hopeful, joyful and energized they feel*" ⁽⁷⁾. Having ***actionable data*** and ***evidence-based science*** is essential but like the Cottage Industry founders understood, we need to convey the information and reinforce healthy practices at an ***emotional-experiential level*** to incorporate positive behavioral change more easily in our lives.

During COVID there was a growing awareness of our biomarkers and overall health. Post-pandemic, many workers expressed concerns about their mental health ⁽¹⁶⁾. The younger, diverse workforce is of particular concern. We see the expansion of companies like Calm, Talk Space and BetterHealth utilizing technology to address emotional health and capture market share.

Through sensors and other technology, we can explore the connection between our emotional and physical health. To better understand our sympathetic and parasympathetic systems we can track our heart rate variability (HRV), sleep patterns, breath, heart rate, nutritional intake, blood oxygen levels, strength, flexibility, noise levels, glucose spikes, cholesterol, metabolism, time spent in nature, and observe mood changes, etc. Thereby, allowing us to better understand how our chemical, neurological, biomechanical, and emotional states operate as a larger, interconnected system. It appears this notion of interdependent systems, our physical and emotional homeostasis, ⁽¹⁷⁾ brings us full circle to the original idea of our mind, body, and spirit connection except now we can track and measure many of these variables through advanced technology and improved science.

The wellness industry knows how to inspire positive behavioral change through experiential programs and create emotionally safe environments to heighten the customer's receptivity to information. Can our industry contribute to these AI health algorithm efforts? Which wellness company will have the size and standing to engage with healthcare institutions and tech companies and ask whether data, algorithms and robotics will replace intuition and human touch or compliment them? Can we help shape how wellness data is used?

The Cottage Industry brought a human element and reminded us that systems are interconnected. Productization taught us how to scale and incorporate sustainable business practices. Science infused an evidence-based efficacy and established a baseline for product and treatment claims. Data and Technology has an unparalleled ability to aggregate data and use AI to touch so many people. Those who assume one phase replaced the other miss the point. We need to synthesize all we have learned throughout these phases into a complex body of work. And time is of the essence. While our industry evolved over decades, the latest phase is experiencing a J-curve or hockey stick acceleration pattern. Any company wishing to respond to the consumer's desire for greater wellbeing must be conversant in all the elements that now comprise our industry.

Due to the wellness lifestyle category casting such a wide net including physical, emotional, and environmental health, breakthroughs in science, the effects of the Pandemic, and the consumer's ability to track their own health and fitness data, the industry must *up its game* to remain relevant. The added cost to wade through the scientific and technological complexity makes it hard for many smaller companies to keep up. Like the product consolidation across horizontal and vertical market segments of the late 19th Century department store or late 20th Century tech and commerce giant Amazon, customers may be attracted to a wellness lifestyle company that functions as a "superstore" democratizing information and being a one-stop brand for a broad spectrum of information, products, and experiences. Whether the delivery channel is a watch, website, vacation retreat, membership club or health center, the 21st Century global leader in greater wellbeing will need large amounts of data to provide actionable steps, science to provide a research arm and efficacy filter, high touch experiential programs, knowledgeable caring staff to personalize the information, inspirational design, a social media platform to connect the community and educate, and a healthcare element for testing and

record keeping. ***All the components exist in the marketplace to assemble the next generation wellbeing company, to be the hub and spoke collecting and disseminating health and wellness information through various delivery channels to create a waterfall of different customer engagements, environments, and price points. To be a global voice.*** We must ask ourselves, are the requirements too daunting for one company or necessary for our fragmented industry to evolve and flourish? Can a brand company with integrated channels create a synergistic network to distribute its products and collect more data through a constant feedback loop?

Certainly, many wellness product companies contribute to the larger category by delivering a single product, albeit a spa treatment, healthier meal, blood analysis, skincare product, or fitness App, etc., but to lead a global consumer-facing lifestyle company with the size, skillsets, and diverse products to compete, coordinate and/or partner with Apple or UnitedHealth is something new. Particularly due to these other industries seeking to capture a portion of the lucrative discretionary wellness lifestyle spend by creating similar wellness environments to compete in our space.

Aggregated data is neutral. Science is objective. But from the customers' vantage-point, utilizing and commoditizing data to trade on their value system and lifestyle requires a business to ***act with a moral equivalent***. Whether the business originated in the healthcare, technology, or traditional wellness space, the company's product must benefit the consumer and support their lifestyle to gain customer loyalty. The relationship cannot simply be transactional.

While there have been some transformational visionaries in other industries that created companies such as Disney, Apple, Starbucks, and Tesla, who elevated their product to an Emotional Brand status, most businesses simply have well known Transactional Brands. Whereas, due to the wellness industry's history and DNA there is an established customer trust that should provide an easier pathway to becoming a global Emotional Brand. A strategic benefit.

A brand that is the convergence of wellness lifestyle, technology and healthcare data gives it greater access to a portion of the ***+/- \$11.9 Trillion*** annual global health and wellness spend ⁽¹⁸⁾. Equally important, promoting ***greater wellbeing means healthier people and economies***. A recent McKinsey study concluded, "the economic impact of better health [of a society] could add ***\$12 trillion to global GDP [now through] 2040***" ⁽¹⁹⁾. Placing health, including our preventive lifestyle practices, at the center of social and economic development.

Companies or investors that understand a realignment is occurring and help consolidate a fragmented industry across verticals through investments, mergers, acquisitions, roll-ups, and strategic alliances while holding true to the mission will have a tremendous and lucrative advantage and help shape the future of our wellbeing.

The wellness lifestyle business has evolved from a cottage-industry to multinational corporations but our original promise, ***to empower and inspire people so they can make***

healthier choices and enjoy better-quality lives remains the same. The industry has moved through what sociologist Everett Roger's terms cycles from Innovator, Early Adopter, Early Majority, Late Majority, Laggard and onto the next cycle - New Innovator. Our industry is an important thought leader facing logistical, technological, and labor problems, and it will be harder to keep up with the consumer's expectations if it doesn't consolidate and adapt. If the tech world can seek to develop AI and connect and aggregate data for the internet of (every)things we too can understand our future depends on an ability to build scale and fluidly navigate between the human intuitive, analysis of raw data, and machine learning in a highly connected, interdependent system.

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Footnotes:

1. This was in a highly monitored program. Diabetes 2 is a serious disease, and any positive diagnosis requires immediate consultation with your physician to put in place the right diet, exercise, and/or medication program for you.
2. Emotional trauma and/or PTSD treatment(s) should be in consultation with your mental health counselor.
3. McKinsey & Company, *Still feeling good: The US wellness market continues to boom*, September 2022
4. American Psychiatric Association (APA), Morning Consult sample survey of 2,210 adults, September 21-22, 2022, "According to a new poll from the American Psychiatric Association (APA), four out of five (79%) adults say that the state of mental health in the U.S. is a public health emergency that merits more attention from lawmakers".
5. Revise Sociology - *From Modernity to Post-Modernity*, April 9, 2016, Modernity (1650 to 1950) involved industrialization, capitalism, urbanisation, nation state building, and a belief in progress through science. Postmodernity (1950 to today) is global, media saturated and hyperreal, consumerist, culturally diverse, skeptical, and uncertain about politics, science, and the truth.
6. Rachel Carson, *The Silent Spring*, 1962, The overarching theme was the effect humans have on the natural world and an awareness that pesticides have detrimental effects on environment health.
7. American LIVES' psychographic research, Brooke Warrick researcher conducted between 2003-2010 and supplemented in 2018, in 92 markets and 100,000 surveys around consumer sentiment and values around their wellbeing, with +/- 65% measuring their wellbeing-based on how they feel.
8. In the 1990's through today a myriad of research, data, articles, and reports have been released addressing environmental health and a growing awareness of the impact lifestyle choices (sedentary lifestyle, obesity, alcohol, nutritious diets, processed foods, environmental factors, misinformation about supplements, stress, etc.) have on health, disease and mortality, *including but not limited to*, NIH, 2000 Sep;23(9):1278-83 NIH, Diabetes trends in the U.S.: 1990-1998 [Mokdad](#), [Ford](#), [Bowman](#), [Nelson](#), [Engelgau](#), [Vinicor](#), [Marks](#), 1994, *Trans fatty acids: are the effects only marginal?* [Willett](#) and [Ascherio](#), the US Surgeon General 2001 Call to Action (www.hhs.gov), Center for Disease Control and Prevention reports (www.cdc.gov and www.nih.gov), links provided by Cleveland Clinic, Harvard Medical Center, Mayo Clinic, launch of WebMD.com, etc. where available for public consumption, further articulated in American Diabetes Association, 12.29.2022 report, etc.
9. Comparing books written by Dr. Steven Gundry, Dr Mark Hyman, Dr Rudolph Tanzi, Dr Andrew Weil, Dr Mark Liponis, Deepak Chpora, Dr David Agus, Dr Kenneth Pelletier, and Dr Richard Carmona it is worth noting all writings cite scientific sources and methodology with some relying more heavily on objective randomized control group data and longitudinal studies while others at times also extrapolated from smaller group testing, preliminary research, and data. Furthermore, certain authors evaluation of ancient traditional practices, use of patient case studies, antidotal information and hypotheses helped shape their conclusions and recommendations.
10. The Harvard Gazette, Article, *When science meets mindfulness*, April 9, 2018, Alvin Powell; Article, *Genes are nice but joy is better*, Liz Mineo, April 2017; Chopra and Tanzi, Book, *Super Genes*, November 2015,
11. [In an effort to show many sides of an argument without supporting any claim] Examining surveys and historic traditional wellness and medical practices, with some additional scientific testing and then

extrapolating scientific conclusions is not without concerns and peer review criticism. [whyevolutionistrue blog](#), May 2014, challenging the science and conclusions referred to in Super Genes; or Bailey Kirkpatrick, article, [thatisepigenetics.com](#), [Epigenetics: Avoiding the pull of Pseudoscientific Nonsense](#), November 2015.

- [I recommend a RATING SYSTEM (others have suggested similar concepts) for data and claims that exist outside of the FDA and CPSC purview, should be instituted for our industry based on available science. The claim is either:
 - **A. Conclusive** (positively or negatively) because there is randomized control test, peer review and/or longitudinal studies to reach a conclusion,
 - **B. Suggestive** because there are preliminary tests, small group trials or significant survey/observation data that leans in a direction in advance of controlled and peer reviewed studies, or
 - **C. Inconclusive** because there is not enough data or testing to make any claim.]
- 12. NIH, [A Comprehensive Survey on Machine Learning-Based Big Data Analytics for IoT-Enabled Smart Healthcare System](#). Li W., Chai Y., Khan F, et al. Article, 06 January 2020. nih.gov.]
- 13. Apple Report, [Empowering People to Live a Healthier Day](#), July 2022: “Our work primarily falls into two categories, described in two corresponding sections of this report: personal health and fitness features on Apple Watch and iPhone, and the work we are doing with the medical community to support research and care.”
- 14. Forbes Article, [Apple’s Latest Report Details Its Bold Vision For Healthcare](#), Sai Balasubramanian, July 25, 2022,
- 15. [Digital Health](#), [A unified health algorithm that teaches itself to improve health outcomes for every individual: How far into the future is it?](#) [Laroia](#), [Horne](#), [Esplin](#), and [Ramaswamy](#), Published online January 2022
- 16. McKinsey & Company, [Diverse employees are struggling the most with COVID-19](#), Ellingrud, Krishnan, Krivlovich, Robinson, Yee, Kukla, Mendy and Sancier-Sultan, Article, November 17, 2020. In a [new report](#), McKinsey surveyed 1,100 executives and 2,656 employees across 11 countries to see how the pandemic is impacting workers. “We discovered that workers across demographic groups and geographies reported a remarkably similar set of challenges related to mental health, work–life balance, workplace health and safety, a missing sense of connectivity and belonging with colleagues, and concerns about job opportunities” [This workplace survey is different than the generic APA research cited in footnote 4 above.]
- 17. [In this reference I take creative license with the established definition of homeostasis to include one’s emotional effect as an integrated component to our biological system.] [Wikipedia](#), “the state of steady internal, physical, and chemical conditions maintained by living things... Homeostasis is brought about by a natural resistance to change when already in the optimal conditions,^[2] and equilibrium is maintained by many regulatory mechanisms: it is thought to be the central motivation for all organic action. All homeostatic control mechanisms have at least three interdependent components for the variable being regulated: a receptor, a control center, and an effector.”
- 18. Business Wire - ReserachAndMarkets.com, [The \\$11.9 Trillion Global Healthcare Market: Key Opportunities & Strategies \(2014-2022\)](#), Article on a Report, June 25, 2109,
- 19. McKinsey Global Institute, [How prioritizing health could help rebuild economies](#)” Penny Dash, Grail Dorling, Kristin-Anne Rutter; Katherine Linzer, Aditi Ramdorai, Jaana Remes, and Shubham Singhal, Article, July 2020

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