

THE WELLNESS ZEITGEIST

9 TRENDS

Shaping
Health &
Wellness Today

WELCOME TO THE WELLNESS ZEITGEIST



Wellness continues to live in the white-hot center of everything. How we eat, sleep, feel, think and care for ourselves has become a daily practice and cultural phenomenon. We see how Wellness has expanded the definition of what it means to be healthy – mentally, physically and emotionally.

And, while there are many critics of the "squishy" term Wellness, and the perception that it's reserved for the elite, we can't argue with a few facts: 1) the Wellness industry, a \$4.2 trillion business today, continues to flourish across a range of sub-industries including health, beauty, travel and technology, to name a few; 2) over 90 percent of today's employers support their employees Wellness goals through a range of corporate health and wellness programs and initiatives; 3) with chronic disease, obesity and mental health issues raging worldwide, leading to unsustainable healthcare costs, a Wellness lifestyle has never been more critical.

In fact, according to our most recent Edelman Trust Barometer, trust in the consumer health sector in the United States rose seven points in 2018 – tied for the largest increase in this category, only seen before in 2016-2017. We surmise the jump is due to expensive prescription medicines coupled with the increasing availability and convenience of health and wellness products and services through online retail, as well as excitement around the category's continued growth, ubiquity and democratization.

So, whether you're a Wellness advocate, critic or skeptic, it's safe to say the business and practice of Wellness is healthy, well and here to stay.

Here are the 9 Trends we see in the Wellness Zeitgeist heading into 2020.

THE WELLNESS ZEITGEIST METHODOLOGY

CONSUMER

–
Attitudes and
behaviors

–
"How I'm
behaving"

+

CULTURE

–
Norms and
values

–
"Why it's
important"

+

CAPABILITY

–
Business and
brands

–
"What I can
access"



9

TRENDS



Edelman

YOUNG, HIP AND SOBER

There are plenty of good reasons for choosing to abstain from alcohol, but societal pressure to indulge is intense. In many cases, not drinking can mark a person as "having a problem," or being uptight and anti-social. This is starting to change, as the "sober curious" gather in ever greater numbers to share beautiful, delicious alcohol-free beverages and have an amazing time...that they'll remember in the morning.

WHAT TO WATCH FOR:

Sober bars / healthy mocktails

Alcohol companies creating non-alcoholic drinks

Replacements for alcohol like CBD and other natural ingredients



YOUNG, HIP AND SOBER

“**Sober Curious**” consumers are driving market growth for low- to zero-alcohol beverages which is expected to be as high as 32% between 2018 and 2022.⁽¹⁾ And while many of these drinks are being produced by small-batch entrepreneurs, large manufacturers are embracing them as well. This trend makes itself known primarily through events and products that cater to those who want to give up the alcohol, but not the fun.

- **Club Soda event series** features guided meditations, lectures on topics like sober sex and dating, conversations on how to navigate the holidays without drinking.
- **Juice Crawl** event series featured by Seth Meyers, Jimmy Kimmel, and Dr. Oz, offers a healthy experience that mixes traveling to juice bars with working out.
- **Seedlip** calls itself a “Nature Company” with the mission to change the way the world drinks by providing the highest quality non-alcoholic options.

Expert and author of the book **Sober Curious**, Ruby Warrington talks about what the movement means to her; “*The sober curious conversation is about cultivating enough trust, self-awareness and self-belief to know that it’s OK to make choices that feel good for you, no matter what’s going on around you, no matter what the pressures might be.*” ⁽²⁾

The trend is not about abstaining due to alcoholism. According to **Vice Media**, “the kids helping fuel this trend aren’t all addicts. Some seem naturally disinclined to drink. Alexander, a current college junior told me that “I find alcohol existentially terrifying” and that he mostly avoids campus parties with “copious amounts of alcohol.” Instead he organizes weekly Friday night board game gatherings-- a dry event for people who don’t want to go drinking.” ⁽³⁾

According to the “2017 Monitoring the Future Report”, alcohol consumption at colleges is on a steady decline and has reached historic lows.⁽⁴⁾ A Bartender at **White Dog Café** near the U of Penn Campus has observed that in the past “people would look at you like you’re strange if you weren’t drinking in a bar, but now it’s every other person. You come for the food, for the socialization.” ⁽⁵⁾

For all of the conversation about the sober curious movement, some mental health professionals argue that calling sobriety a “trend” could be harmful. Carter Barnhart, Chief Experience Officer at Newport Academy, an adolescent treatment center, told **Refinery 29**: “Individuals and society may begin to underplay the serious and life-threatening nature of alcohol abuse and alcoholism.”

References:

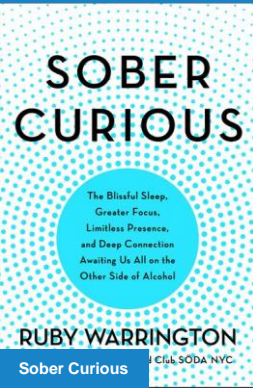
(1) NCBI Global Drug Survey, June 2017,

(2) “The New Sobriety” Alex Williams, NYT 6/15/19

(3) “what it’s really like to stay sober in college” Eve Peyser, Vice Media Dec. 2018

(4) “College Binge Drinking Rates Continue to Decline” Maureen Dalbec, Aug. 2018 Responsibility.org

(5) Research suggests that students Nation Wide are drinking less alcohol than 25 years ago, Margaret Lu, The Daily Pennsylvanian, Sept. 2018



Seedlip's founder, Ben Branson



Seedlip



Curious No. 1 Cocktails



Mai Tai Mocktail



CBD FOR YOU AND ME

Hey man...want to not get high? That's the driving force behind the growing CBD trend -- all the therapeutic benefits of cannabidiol without the psychoactive effects of THC. And unlike the illicit pot of the past, CBD has captured the interest of well-established mass brands, who are launching their own lines of CBD-infused products.

Edelman Trust Barometer

Trust in "Consumer Health" increased this year in the U.S. by a healthy 7 points. It's possible this was driven in part by excitement around more integrative solutions to health, like CBD and cannabinoid products

WHAT TO WATCH FOR:

More competition from OTCs, foods/beverages, and personal care

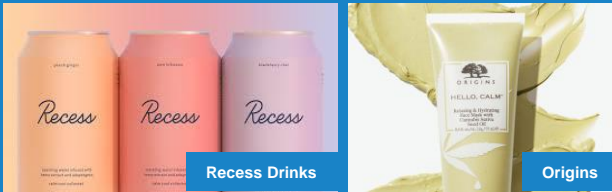
Without clinical data, efficacy and safety will remain in question
Ongoing legal and regulatory discussion and controls



CBD FOR YOU AND ME



CBD oil



Recess Drinks

Origins



Ben & Jerry's CBD ice cream



Uleva sleep aid

A national survey reveals that 82% of adults in the US believe that cannabis products can offer wellness or therapeutic benefits ⁽¹⁾. You can eat it, soak in it or rub it on your skin and it's not all about getting high. According to a Google search analysis conducted by trends watcher Iconoculture, "CBD gummies was the third most popular food-related Google search of the year in 2018 — following unicorn cake and romaine lettuce" ⁽²⁾.

Interest in CBD is far reaching, according to CBD Marketing, which analyzed 1.3 million U.S. social media posts for the period during 2018. Conversations were generated about equally by men (48%) and women (52%). Baby boomers and Millennials each generated 41% of the posts, while Gen Xers represented 18%. Top terms were 1) pain management, 2) anxiety and depression, 3) health and beauty, 4) pet care ⁽³⁾.

Sentiment regarding CBD differs by generation ⁽³⁾

- **Baby Boomers** are looking for efficacy without the side effects of prescription drugs
- **Gen Xers** are emerging as super fans with 91% of all CBD oil related posts being positive in sentiment
- **Millennials** are interested but skeptical of value for the cost

Brands are incorporating CBD into their products and charging a premium without much proof:

- **Origins** launched a new celadon green face mask that contains cannabis sativa seed oil from hemp
- **Recess Drinks** are sparkling water infused with hemp extract that promises to leave you feeling calm, cool and collected
- **Ben & Jerry's** announced that it is committed to including CBD in its ice cream innovations in the near future

References:

(1) Iconoculture/ Gartner Consumer Values and Lifestyle Survey. October 2018.

(2) Iconoculture/ "Year in Search 2018." Trends.Google.com.

(3) "Boomers and Millennials alike are buzzing about CBD" Jean Ban, Super Market News, April 2019

DATA DRIVEN SELF-CARE

In the past, "getting to know yourself" was a spiritual or emotional journey. These days, it's a biological and data-driven undertaking, as the quantified self trend rapidly expands from counting your steps and monitoring your heart rate into at-home DNA testing, metabolism-based diets, and a range of DIY kits that allow people to measure everything from fertility to food reactivity.

Edelman Trust Barometer

Tech is the most trusted sector in the U.S. (15 points higher than the least trusted industry in the U.S., financial services). Within Tech, Health Tech is the most trusted sub-sector, which may be a result of consumer belief in Health Tech's ability to improve peoples lives

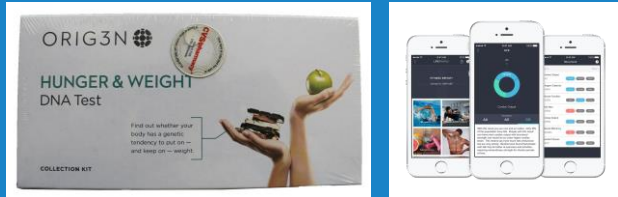
WHAT TO WATCH FOR:

Increased FDA scrutiny
Decreased pricing/increased access
Data and storytelling linking products to improved health

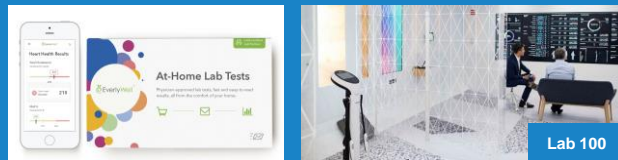




ORIG3N DNA Kit



Everywell At-Home test



Lab 100

“23andMe” opened the door for consumers to better understand their health through at-home genetic testing. Now it’s not just disease risk that genetics can point to. New home tests can provide personalized data to help individuals create self-care routines that are just right for them and increase the likelihood of getting the desired results. By helping individuals understand what works for their body they can be more efficient in how they spend their time and money on self-care choices.

This trend extends the desire for wellness personalization to the next level. “What says you’re ‘special’ more than finding out everything about yourself, right down to the nitty-gritty of genetics? These kits could be viewed as an indulgent genome-oriented pampering session -- the latest plaything of the ‘Worried Well.’” (1)

Science is fueling new capabilities in at-home testing

- **ORIG3N** offers multiple options for DNA tests that depend on your personal goals: Intelligence, Fitness and Nutrition
- **Lumen** is a device you breathe into that helps you choose the right foods for your metabolism and gives you guidance on when to eat them
- **Everywell** offers 30+ at-home kits — from fertility to food sensitivity tests — with the promise of accurate, actionable and easy-to understand physician-reviewed results and insights sent to your device in days.
- **Epicore Biosystems & Gatorade** are developing a bandage-like wearable that will tell athletes when they need to hydrate, expected to hit shelves in the coming year.

In the future, consumers interested in genetic testing may see it as an ongoing part of their wellness, not just a one-and-done answer. New theories are emerging about how our genes can change over time. Expert on the subject Kenneth R. Pelletier writes that “The epigenetics of the gene revolution is more like an interactive artificial intelligence. We are constantly interacting with our environment, everything we do and everything around us to, in turn, express or suppress a particular gene. We can control our genes instead of them controlling us” (2)

References:

- (1) “What I learned from home DNA testing” Barbara Ellen, *The Observer* July 201
- (2) *Change your Genetics, Change your life*

COMING OUT ABOUT MENTAL HEALTH

Depression, anxiety and mental illness have long been characterized as a shameful secret, personal failing, or joke. But the conversation around mental health is shifting in positive ways, thanks in large part to celebrities coming forward to share their own experiences.

WHAT TO WATCH FOR:

Continued de-stigmatization of mental and emotional health issues
Democratization of mental health care programs, e.g. large employers, prisons, schools, and under-served communities
Better mental health coverage through insurance plans



COMING OUT ABOUT MENTAL HEALTH

Millennials are putting aside their fears and talking about their own mental health challenges more openly, thanks in large part to celebrities paving the way by sharing their own struggles with mental health.

National Alliance on Mental Illness (NAMI) works with over 20 high-profile influencers and has seen that as more of them tell their stories — be it professional athletes, authors, musicians, or social influencers — others are inspired to do the same. ⁽¹⁾

PopSugar editor **Christina Stiehl**, who suffers from mental illness, talks about celebrity impact on the conversation “Sixteen years after my diagnosis, brave celebrities are igniting the conversation about mental health and paving the way for others to share their stories. **Michael Phelps** and other athletes are using their high-profile status to shatter the stereotype that mental illness is a sign of weakness.” ⁽²⁾

The result has been an increase in accessibility, affordability and convenience of services and support, as well as increased conversation on social media. The social network [Reddit has 112K subscribers](#) to the subreddit “mental health,” and there are a wide range of apps focused on mental health, including mood trackers, online therapy, mindfulness training and more:

- **Talk Space**, Affordable online therapy brought right to you
- **Replika**, an AI-driven companion that helps you express and witness yourself by offering a helpful conversation.
- **Vent**, a community of people who can “support, advise or make you laugh”

For young people, students are opening up and asking for help at their schools. “We’re finding that young people are more eager to talk about these issues. They hunger for this type of support and conversation and are looking to their school to provide it.” (Theresa Nguyen, VP of policy and programs at [Mental Health America](#).) ⁽³⁾

References:

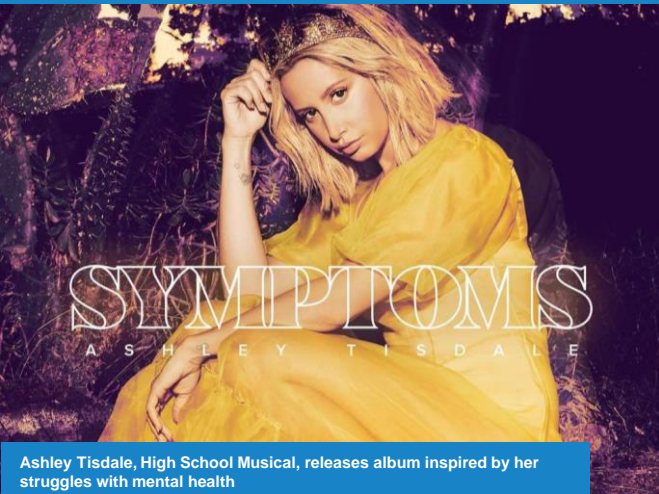
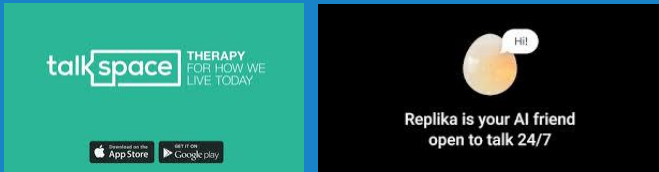
(1) “What happens when celebrities speak out” Katrina Gay, NAMI 05/24/19

(2) “Why Mental Health Matters” Christina Stiehl, PopSugar, 05/01/19

(3) “Are Schools Ready to Tackle the Mental Health Crisis” Tim Walker, neaTODAY09/13/18



Michael Phelps spokesperson for TalkSpace



Ashley Tisdale, High School Musical, releases album inspired by her struggles with mental health

DYING WELL



The contemplation of a good death is an ancient practice, stretching back to the Stoic Memento Mori and the Buddhist marana-sati. In modern times, however, death is feared, hidden, and shrouded in mystery.

Boomers, the generation that invented 'teenagehood' and redefined middle age, are taking a new look at death, and discovering how the examination of mortality can make life richer.

WHAT TO WATCH FOR:

Policy discussions on "right to die"

Payers/employers responding with content and programs

HCPs/hospitals/palliative care participating in the discussion/experience

DYING WELL

Society is finally recognizing that silence around death hurts our living experience and that dying well starts with open conversation that breaks down fears and barriers and enables people to regain control over the end of life experience.

According to the **Global Wellness Institute**, “Everything around dying is getting radically rethought – from making the experience more humane, to how we mourn, to funerals getting reimagined,”⁽¹⁾. This has led to the emergence of Death Doulas, a new kind of end of life support, trained in attending to the spirit.

Death Doulas say that they do it for others, but it benefits them as well by pushing the awareness of their own mortality to the forefront. According to Henry Fersko-Weiss, Co-Founder **International End of Life Doula Association**, “people that face death and impermanence live differently, better and more consciously; they realize that how they live matters; they make wiser choices about how they spend time and about how they relate to other people.”⁽²⁾

Our fascination with death is playing out in a multitude of new ways⁽³⁾

- **Death Doulas** are giving people a more meaningful and peaceful death by managing patient and family needs in the gap between medicine and hospice.
- **Ask a Mortician** is a YouTube series that dives into all aspects of death and dying. No topic is off limits.
- **Reimagine End of Life Festivals** held in NYC and San Francisco offer hundreds of workshops, performances and exhibits all exploring the meaning and experience of death.

References:

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(2) “Dying is hard, Death Doulas want to help make it easier” Ellen McCarthy, WashPo 07/22/16

(3) “Death wellness movement aims to eliminate consumers’ fear of death” Iconoculture Global Trends, 06/24/19



Caitlin Doughty - Ask a Mortician on Youtube



Reimagine End of Life Festival, NYC

SLEEPING WITH TECHNOLOGY

No shame in this game. There are SOME devices we love to have in bed with us. You can count the new wave of sleep-enhancing tech among those welcome bedfellows. With good sleep being touted as the key to vitality, productivity, weight management, and mood regulation, these sleepyttime devices might just rule the night.

Edelman Trust Barometer

While Tech is the most trusted sector, there is a healthy bit of skepticism and worry about the speed of change. Almost half (48%) of US respondents feel that “Technological innovations are happening too quickly and are leading to changes that are not good for people like me”

WHAT TO WATCH FOR:

Questionable acceptance of people leveraging sleep technology
Sleep tech market will calibrate to consumption habits
Consumer will increasingly prioritize sleep – but without all the tech



SLEEPING WITH TECHNOLOGY

The sleep technology sector is enjoying massive growth with companies offering devices to help us become aware of our sleep habits and even improve them. At the annual **Consumer Electronics Show (CES)** sleep tech has become one of the biggest trends as evidenced by the fact that the sector grew by 22% compared to 2018.⁽¹⁾

According to Professor Cary Brown, sleep researcher at the University of Alberta, "Technology has created so many of our sleep problems and it's naive to think we can turn back the clock to the days before smartphones, laptops and other blue-light-emitting devices. But, if we understand how to use it wisely, technology can also be used to facilitate better sleep,"⁽²⁾

- **Select Comfort**, built on the philosophy that "junk sleep is no better for you than junk food," has Sleep Number® beds and SleepIQ® technology that track your sleep patterns and give you tips for improvement
- **UrgoNight** recognizes that good sleep is not natural for everyone and devised a product that helps sleep train your brain in just a few minutes a day
- **Sleep Box** is a glowing, wooden box built by Mark Zuckerberg to help his wife sleep better. It emits a faint light between 6 and 7 a.m., signaling it's time to get up. There's no clock, which typically causes stress. Mark Zuckerberg said, "So far this has worked better than I expected and she can now sleep through the night."

The National Sleep Foundation recognizes the value in sleep tech and is setting high standards for the industry. They've created the Sleep Tech Counsel which is working to standardize definitions of various sleep variables (Deep, Light, REM sleep, sleep onset, etc.) so that when patients talk to their doctor about sleep problems, everyone is speaking the same language⁽³⁾

References:

(1) "Can Technology Help you Sleep Better" Sleep Sherpa, 01/28/19

(2) "How Technology Can Help you Get a Better night's sleep" Bev Betkowski. Medical Press 03/16/18

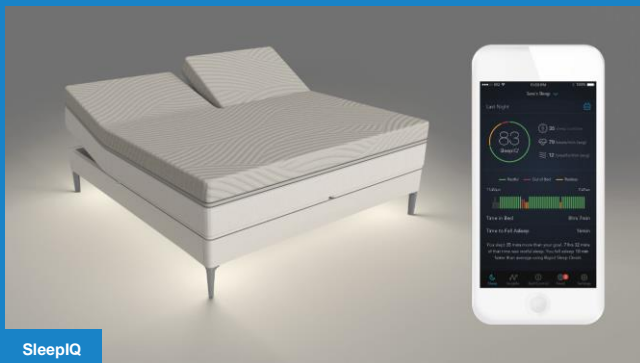
(3) "NSF Sleep Technology Council to Innovate mHealth Sleep Apps" Sara Health, mHealth Intelligence, 08/17/15



Sleep Box



UrgoNight



SleepIQ

THE WELL CEO

Most companies offer employee wellness programs, yet few employees ever take advantage of this benefit.

Research has shown that employee engagement is dependent upon seeing participation from the C-Suite. If employees are going to break a sweat, they want to see the boss walk (or run) the talk.

Edelman Trust Barometer

Trust of Employers in the U.S. is higher (75%) than for NGOs (52%), Business (54%), Government (40%) or Media (48%). Employees expect CEOs to participate by demonstrating their personal commitment to the values they want their organization to espouse.

WHAT TO WATCH FOR:

CEOs becoming the face of corporate wellness programs
More CEOs integrating Health & Wellness into their employee communications
Increased incentives in the workplace





Cedric King and David Cordani, CEO, Cigna, at the 2015 Boston Marathon



Cliff Bar owners Gary Erickson and Kit Crawford at work



David Inns, CEO GreatCall



Henrik Bunge, CEO Borg Apparel

The main reason employees don't participate in workplace wellness programs is concern that it will be looked down upon by the organization. Employees who know their CEO participates in workplace fitness are more likely to participate themselves. And here are just some of the benefits to the organization; culture of motivation, teamwork, stress low/energy high, broader perspective, employee engagement and loyalty.

For CEOs, being fit isn't just about health or vanity – it's actually an important part of the job. According to Research by the [Center for Creative Leadership](#), If an executive is visibly out of shape, others in the workplace perceive them to be less effective leaders. ⁽¹⁾

Henrik Bunge, CEO [Borg Apparel](#), is one of the world's fittest CEOs. He goes by the title "Head Coach," and requires that all able-bodied employees participate in a weekly training session known as Sports Hour. The workout is mandatory but it's also wildly popular. HR chief Lena Nordin says, "We believe that if we are living our brand, which means our strongest version of ourselves, that's when we can add value in every small detail of the business." ⁽²⁾

David Inns, CEO of [GreatCall](#), a provider of mobile health solutions, sees working out with employees as a great way to build a "culture of motivation." He takes employees surfing two or three evenings a week and organizes Friday yoga sessions, however for his employees participation is optional. ⁽³⁾

[Cigna](#) CEO David Cordani sets the ultimate fitness example for his employees – Cordani is an accomplished athlete, having competed in over 125 triathlons. Cordani's commitment to exercise inspires others to accomplish their fitness goals. He volunteers as a running guide for double amputee veterans with Achilles International, non-profit helping people with all types of disabilities participate in running events. ⁽⁴⁾

References:

- (1) "The fittest CEOs in America" Colleen Kane, Fortune Magazine, 05/05/15
- (2) "When the CEO wants you to workout with him" Josh Dean, Bloomberg News, 02/26/19
- (3) "Why great CEOs Do yoga with employees" Lisa Evans, Fast Company 08/21/15
- (4) Double-amputee veterans conquer marathons with Cigna CEO as running guide" STAT News

SCENT AS MEDICINE

A blue-tinted photograph of a hand holding a perfume bottle, spraying a mist onto another hand. The image is positioned on the right side of the page, partially overlapping the text area.

The nose knows, and the trend of scent-infused products is making a big comeback. Research shows that scents can have a profound impact on pain management, cognitive performance, and anxiety relief.

WHAT TO WATCH FOR:

Scent integrated into hospital and patient care settings
Perfume companies linking scent to health and wellness benefits

SCENT AS MEDICINE



The Nue Co functional fragrance



Aeroscena scent gels



S.W. Basics functional fragrance

Scent is enjoying a renaissance moving beyond aromatherapy to have a functional impact on health and wellness issues like stress, anxiety and even mood disorders.

Researchers at **Stevens Institute of Technology** are studying whether the scent of coffee alone might help people perform analytical tasks better. According to Sputnik Futures, a trend-spotting company, soon fragrances will be able to help us 'biohack' our brains and bodies into performing better. ⁽¹⁾

A study published in *Frontiers in Behavioral Neuroscience* found that sniffing linalool, an alcohol component of lavender works as well as Valium. This research showed that linalool works on the same parts of a mouse's brain as valium, but without all the dizzying side effects. A next step will be to develop lavender-derived compounds for clinical use in humans. ⁽²⁾

More than just pleasing, these products are striving to address hard to treat health issues without the side effects of conventional treatments:

- **The Nue Co** is using research to connect cognitive function with the olfactory system which has led to a line of functional fragrance products that stress, sleep, focus and energy.
- **Aeroscena**, at Cleveland Clinic's Innovations Lab, has trademarked the term "phyto-inhalants™" to describe its line of plant-based aromatherapeutics formulated to specifically treat pain, nausea and anxiety.
- **S.W. Basics** is a line of 100% natural functional fragrances that emphasize the link between one-note scents and the brain and body. They have been developed to manage a variety of health concerns including headaches and body aches and pains.

References:

(1) Global Wellness Summit, 05/24/19

(2) "Linalool Odor-Induced Anxiolytic Effects in Mice", *Frontiers in Behavioral Science*, 10/23/18

ENHANCED HOME FITNESS

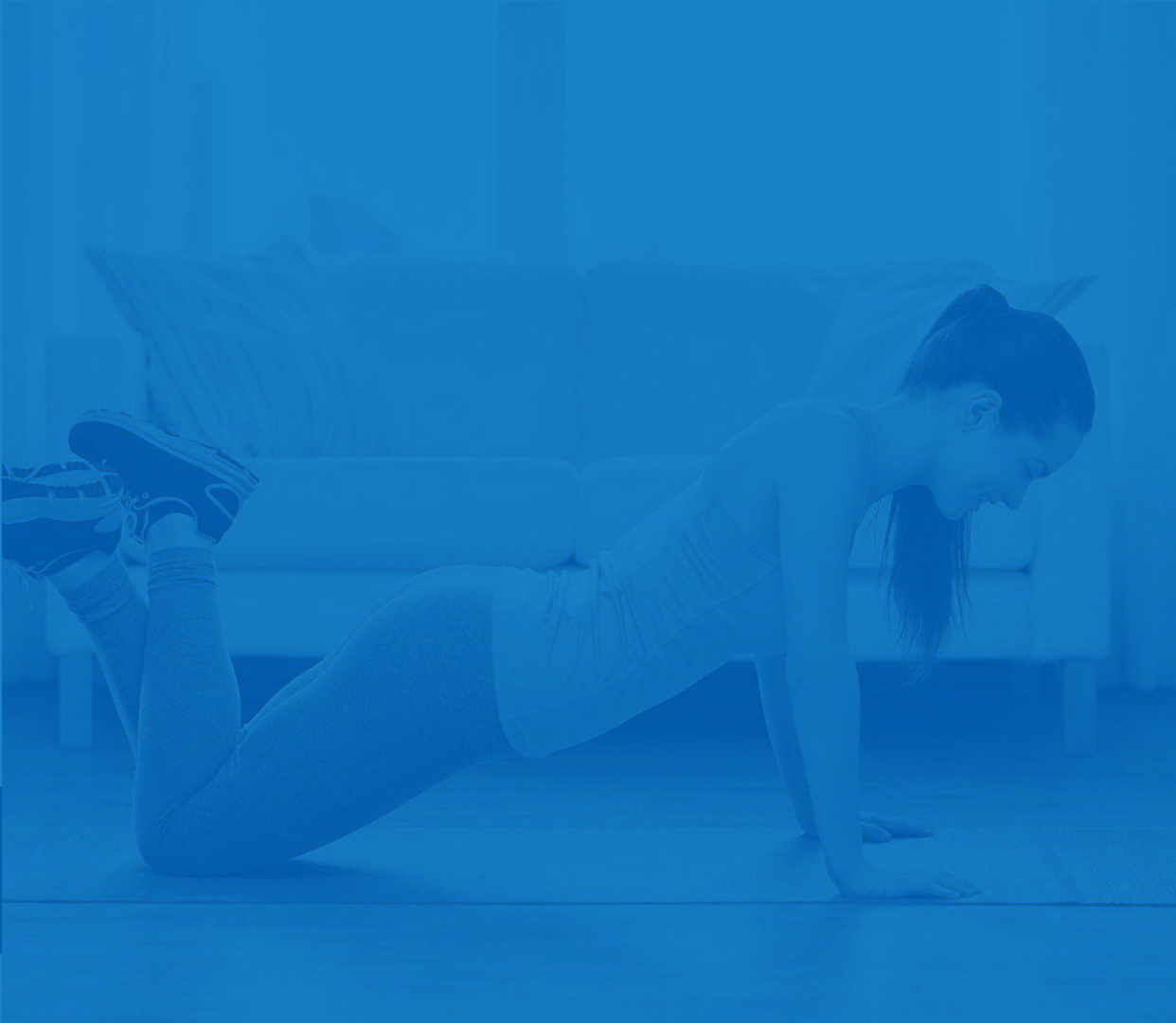
Who among us hasn't had a home treadmill or exercise bicycle that gathered dust (and clothing) in a corner? The new trend of interactive home fitness is putting those discarded machines on blast, with connectivity that mimics the community of group classes, gamification to keep you engaged, and personalized workouts.

WHAT TO WATCH FOR:

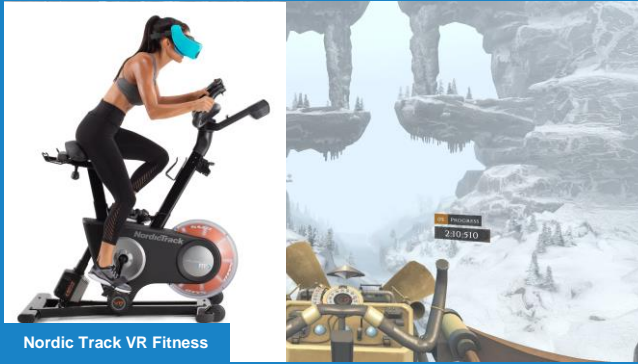
Lower-cost options to democratize the home workout

Proven results that justify the high cost investment

Communities of support built within, so you don't feel in it alone



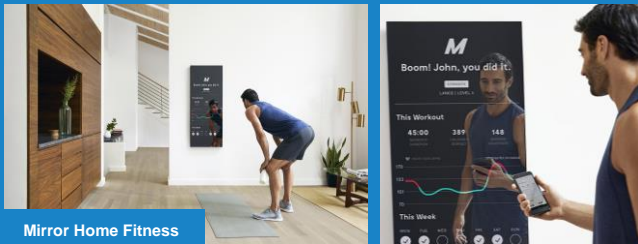
ENHANCED HOME FITNESS



Nordic Track VR Fitness



Zombies Run App



Mirror Home Fitness

As of 2018, the home fitness category was estimated to be \$14B with no signs of slowing down. Data shows that 54% of people who work out at least once a month are interested in buying an at-home fitness system.⁽¹⁾ Gamification, VR and Variety are adding more than just bells and whistles to at home fitness. They have been shown to improve motivation, engagement, and loyalty.

Fitness gamification applies the principles that made games like **Candy Crush** addictive in order to cultivate positive behavior change. Changing habits is essential to creating lasting change and gamification is a way to help facilitate this.⁽²⁾ Virtual Reality creates an immersive experience using sound and visuals to transport people into different environments ⁽³⁾

And as for the biggest issue that holds back those who want to buy home fitness equipment, namely “no room in their home or apartment” (34%), Mirror has come out with a solution. ⁽¹⁾

Some of examples of the latest and greatest:

- **Nordic Track VR Fitness** is an at-home fitness machine that uses gamification to make workouts challenging and fun
- **Zombies Run** is an app that keeps you going on those long runs by combining audiobook story telling with exercise
- **Mirror Home Fitness** uses your personal fitness profile and your biometric data to optimize every workout. Receive real-time instruction, work out with friends and track your progress all right from your home

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(2) “How Fitness Gamification Will Change The Way Personal Trainers Get Results”, Simon Lovell, Forbes Magazine 06/16/17

(3) “Bored with Exercise?” VR immersive fitness might help” Amy Chillag, CNN (03/21/19)

ABOUT WELLNESS 360 @ EDELMAN



We started Wellness 360, a specialty group at Edelman, in 2012, to provide insights into how today's health landscape and consumer are evolving, and in turn, help our clients – both traditional health and non-traditional health companies and organizations – leverage this culture shift.

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