

2019 MINDBODY Wellness Index Report

# Integrative health in America:

behaviors, attitudes, and trends



Low priority

Try to prioritize

High priority



Massage

Acupuncture

Alternative healing\*

Acupressure

B12 shots

Detox program

Reflexology

Acupuncture

# About the MINDBODY Wellness Index

The MINDBODY Wellness Index measures the strength of the wellness marketplace by analyzing business success factors—and consumer behaviors and attitudes—in the fitness, beauty, and integrative health industries.

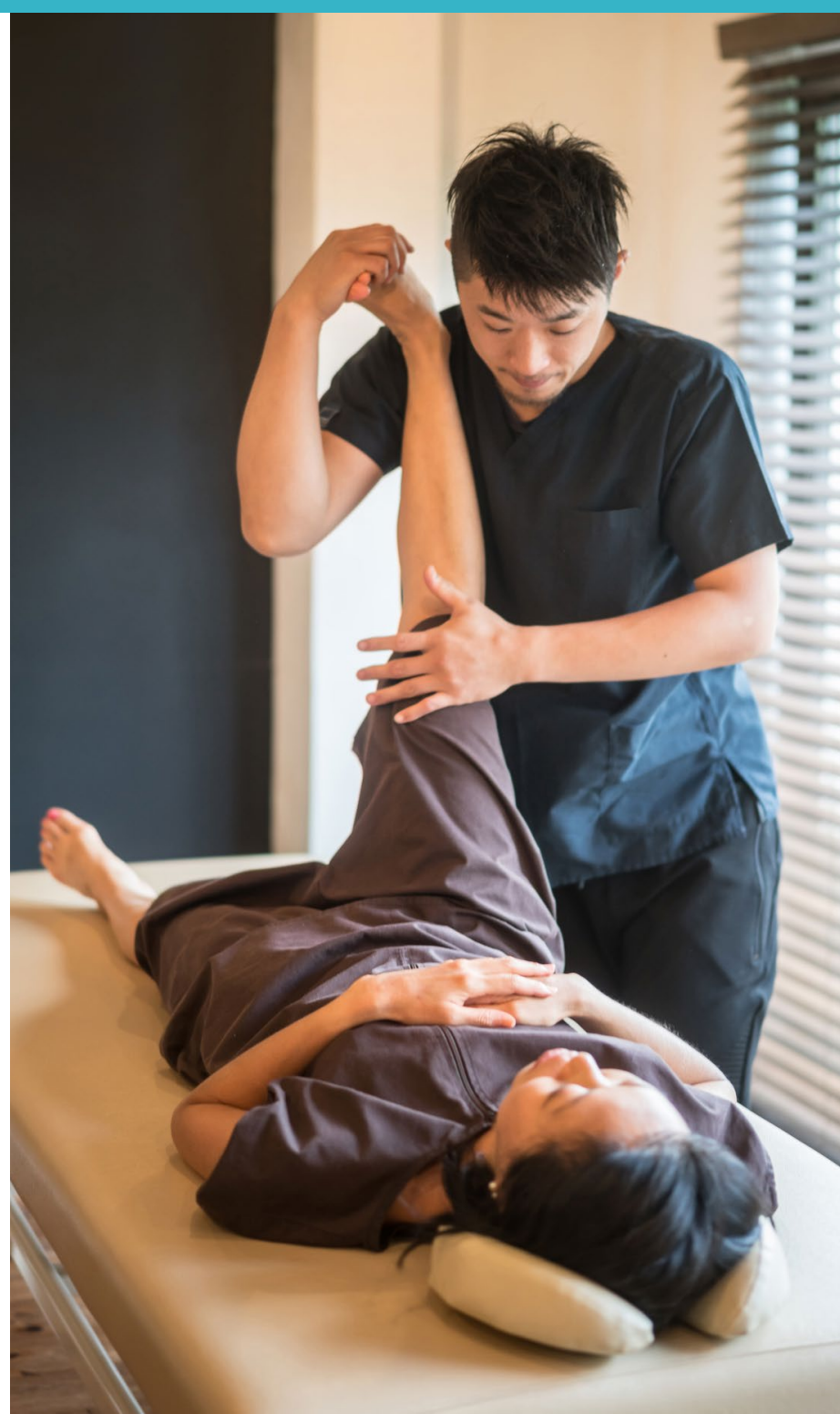
With more than 67,000\* businesses and 58 million\* consumers globally, MINDBODY is uniquely positioned to offer insight into the relationship between the two. The MINDBODY Wellness Index is a proprietary statistical scoring algorithm that incorporates Metropolitan Statistical Area (MSA) level anonymized and aggregated data from the MINDBODY marketplace, third-party data from sources such as the US Census, Google and other business listing services, and data from a large-scale MINDBODY consumer survey covering the largest 50 MSAs in the US.

Nearly 17,000 individuals participated in a 16-minute online survey between Oct. 26 and Nov. 12, 2018. Survey participants spanned the ages of 18 to 65, with a mean age of 39. The sample was 49% male and 51% female. Seventy participants, or 0.4%, self-identify as an alternate gender. Due to low base size, this data isn't included in gender comparisons.

In addition to the flagship [The MINDBODY Wellness Index: Understanding the State of the Wellness Industry in America](#) report, there are additional reports in the series that offer deeper insights into findings in fitness, integrative health, and beauty. Wellness providers can look at these trends to understand clients' needs and better support their goals.

This report focuses on integrative health services in America.

\*As of September 30, 2018.



# What are integrative health services, and how important are they to Americans?

Integrative health services are healing-oriented services that can address the full range of influences that affect a person's health. Integrative health services often incorporate both traditional and complementary approaches to healthcare—to give a holistic view of a patient's health with all dimensions of wellness.<sup>1</sup> Use the glossary on page 17 to learn more about all the integrative services covered in this report.

Americans spent \$14.7 billion out-of-pocket on services from complementary practitioners over the course of a year. About one-third of this spend was for conventional services.<sup>2</sup>

Around 30% of Americans prioritize integrative health through services like massage, acupuncture, chiropractic care, alternative healthcare, and personal coaching.

Men tend to prioritize integrative health slightly more than women (32% versus 29%). Men also spend more money on integrative health services than women (\$300 versus \$228 annually). Despite this, fewer men have actually tried the more popular options, like massage and chiropractic care (56% versus 64% and 27% versus 32%).

Overall, consumers ages 26–45 spend more per year (\$312 average) than 18–25 year-olds (\$204) and 46–65 year-olds (\$228). In addition, 37% of Americans go to an integrative health practitioner three or more times a year. The older age group engages less often in integrative health activities than their younger counterparts.

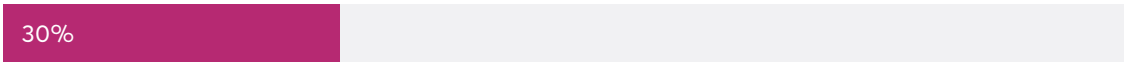
Understanding the attitudes of different age groups and genders can help integrative health providers better target and serve their clients.

Figure 4.1

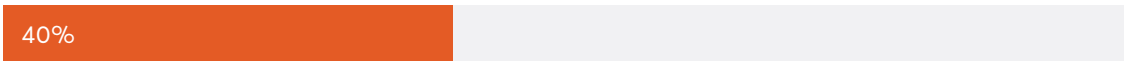
## Relationship with integrative health services

(Services include massage, acupuncture, chiropractic, alternative healthcare, personal coaching, etc.)

Integrative health services are a priority for me/I almost always prioritize integrative health services



I try to prioritize integrative health services when I can



Integrative health services are a low priority in my life right now

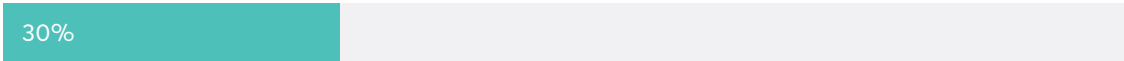


Figure 4.2

## Frequency of getting integrative health services

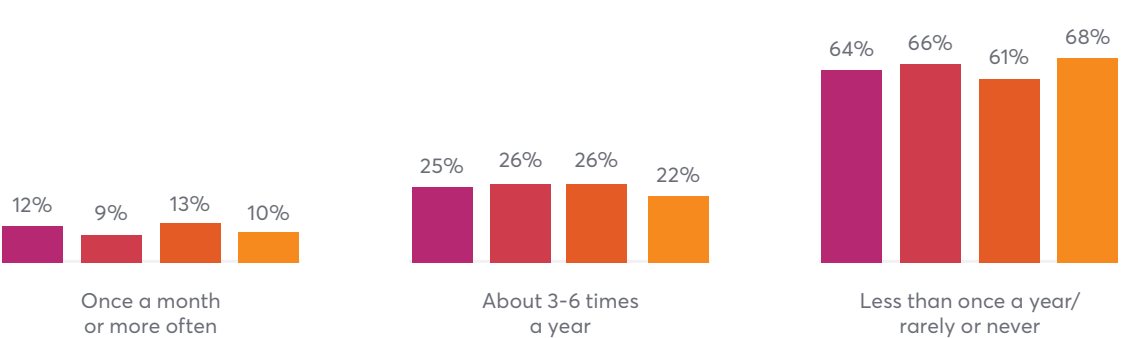
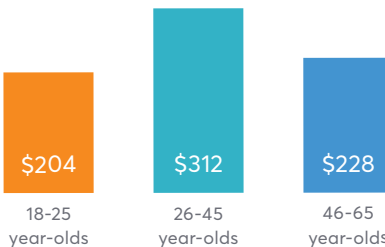
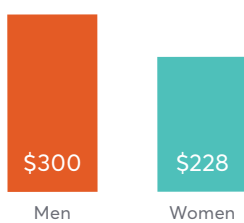


Figure 4.3

## Annual spend on integrative health by age



## Annual spend on integrative health by gender



# Massage: the most popular integrative health service

Massage is by far the top integrative health option, with 60% of consumers noting they have had a massage in the past 12 months. In 2005, massage therapy was predicted to be a \$6–11 billion per year industry. By 2017, revenue was estimated to have been \$16 billion in the US.<sup>3</sup>

Chiropractic care comes in at a distant second (29%) in popularity of services received. The Centers for Disease Control and Prevention reports that the number of Americans who use chiropractors increased from 9.1% in 2012 to 10.3% in 2017.<sup>4</sup> As a result, the Bureau of Labor Statistics predicts that chiropractor employment will grow 12% from 2016

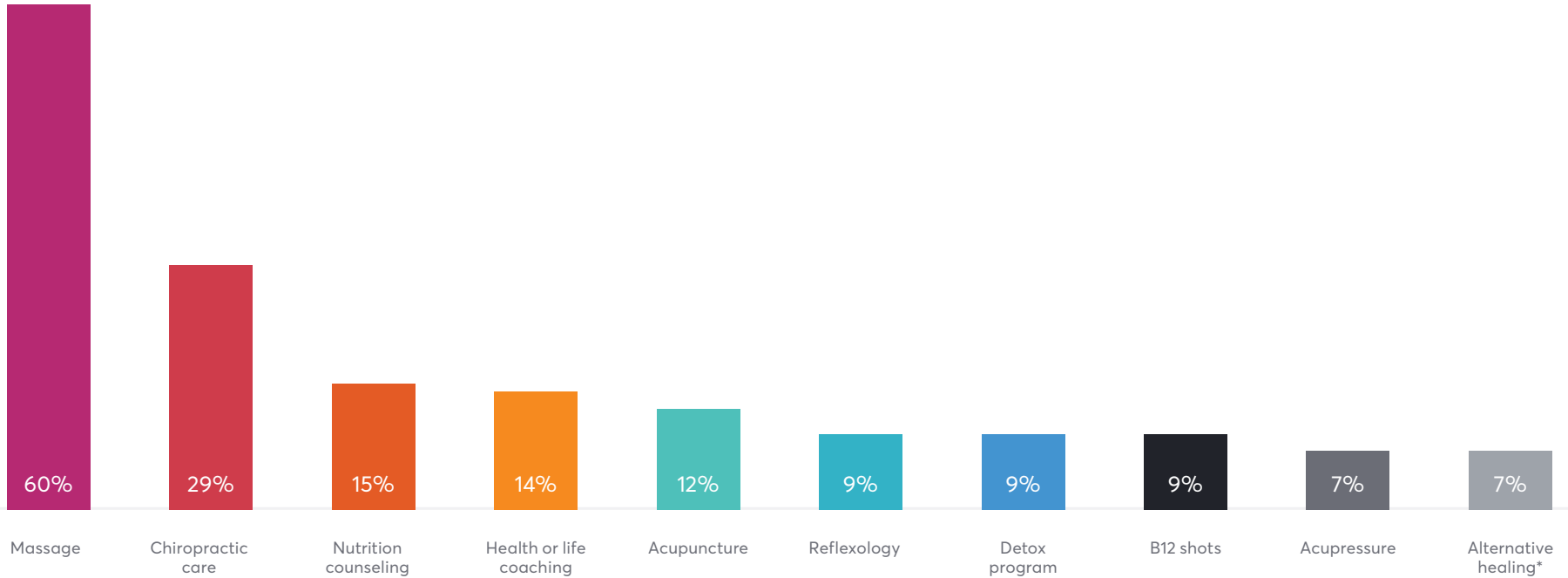
to 2026—an above average growth rate for all occupations.<sup>5</sup>

Third in popularity is nutrition counseling (15%). The revenue for nutritionists and dietitians was \$11 billion in 2018.<sup>6</sup> Job growth over the next ten years was estimated to be 14.6%.<sup>7</sup>

Regardless of age, as seen on the following page, massage, and chiropractic care are the two most popular services utilized. Nutrition counseling and health/life coaching are also in the top five for all age groups. On the other hand, detox programs are more popular with younger age groups, and acupuncture is more popular with older age groups.

Figure 4.4

Top 10 integrative health services (Among those who get services three times per year or more)



## Massage: the most popular integrative health service (cont.)

Figure 4.5

Top 5 integrative health services **18–25 year-olds** tried in the past year

(Among those who get services three times per year or more)

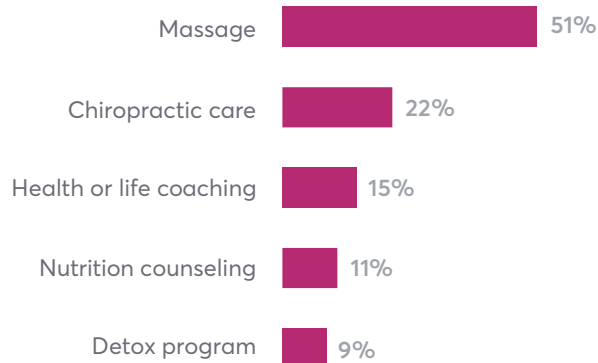


Figure 4.6

Top 5 integrative health services **26–45 year-olds** tried in the past year

(Among those who get services three times per year or more)

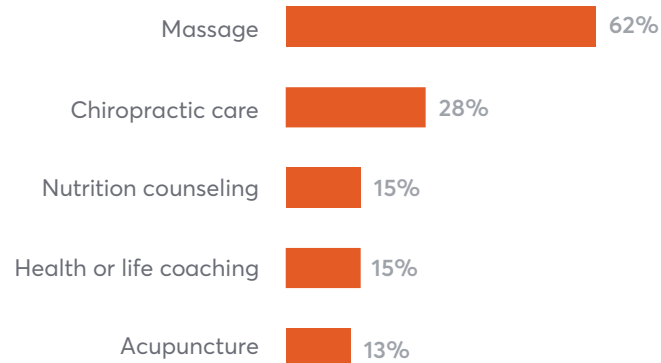


Figure 4.7

Top 5 integrative health services **46–65 year-olds** tried in the past year

(Among those who get services three times per year or more)





## Upcoming integrative health services trends: acupuncture tops the list of what Americans want to try in 2019

Acupuncture is one of the top integrative health services people are interested in trying. This service is the most popular for all age groups and genders with the exception of 18–25 year-old women, where it came in second behind massage services.

Detox programs, massage, hydrotherapy, and nutrition counseling are also in the top 10 for all age groups. Detox programs tend to rank higher for younger age groups.

Health/life coaching is another option that interests younger consumers, making the top 10 for both men and women ages 18–25 (and men ages 26–45).

For women, interest in non-surgical body treatments (such as laser or radiofrequency services) increases with age. It does not appear in the top 10

for women 18–25, but ranks seventh among women 26–45 and second for women 46–65—with 26% of women in this group interested in trying these treatments. These offerings are not in the top 10 for men of any age.

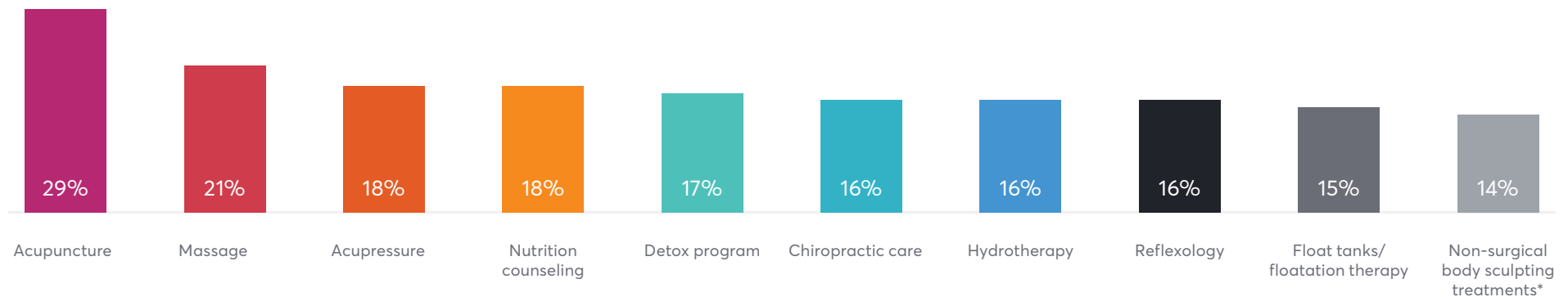
Similarly, raindrop therapy/essential oil treatments made the top 10 for women but not men, regardless of age.

Float tanks made the top 10 for all age groups, with the exception of women ages 46–65.

B12 shots are popular among both women and men ages 46–65. However, this service did not make the top 10 for any other age group.

Figure 4.8

Upcoming 2019 integrative health trends: Top 10 integrative health services Americans are interested in trying next (Among those who get services and are interested)



\*Non-surgical body sculpting treatments (e.g., laser or radiofrequency body treatments)

## What services do 18–25 year-olds want to try next?

Figure 4.9

### Top 10 integrative health services among women

(Among those who get services and are interested)

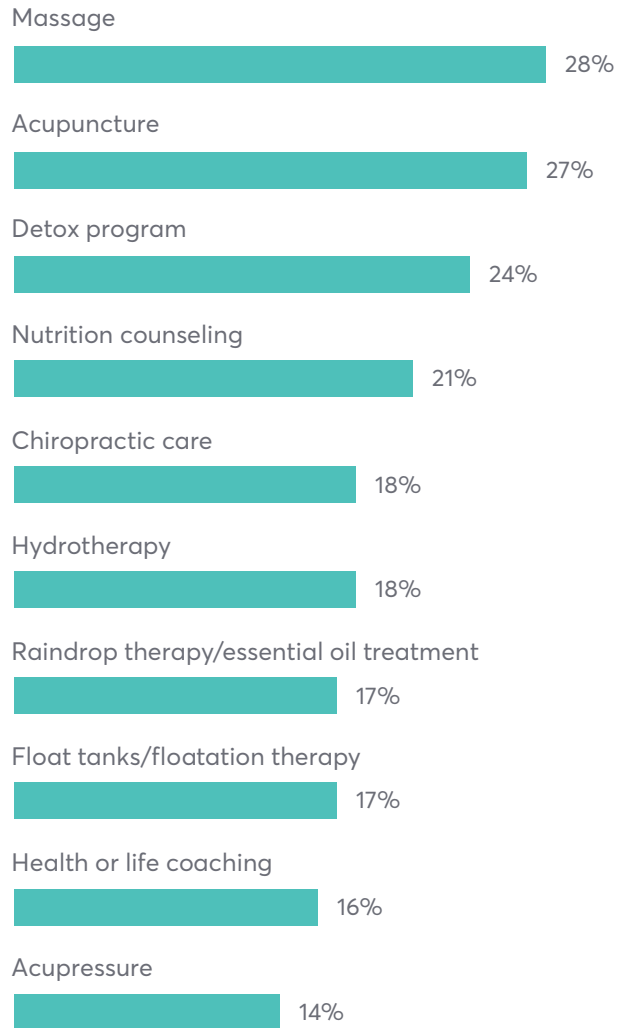
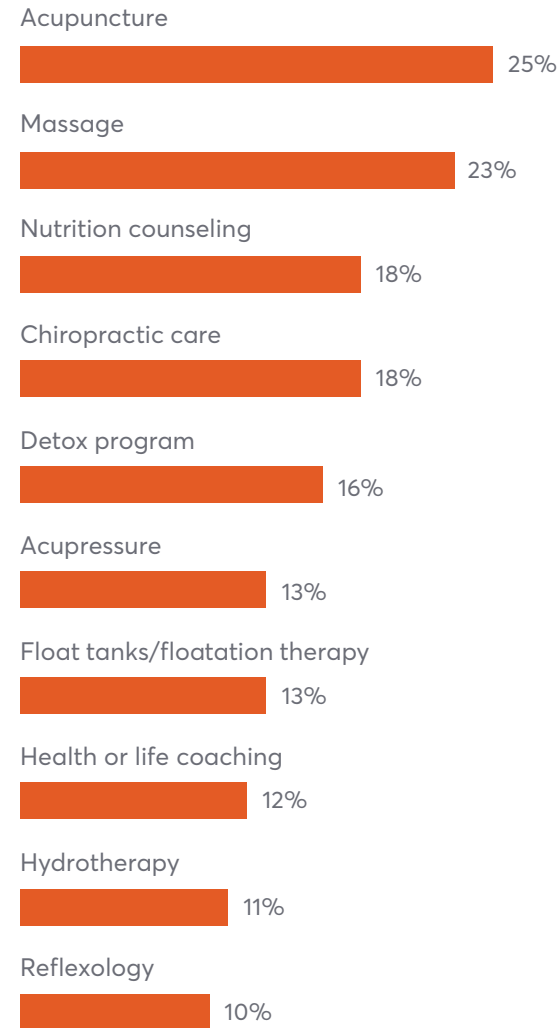


Figure 4.10

### Top 10 integrative health services among men

(Among those who get services and are interested)

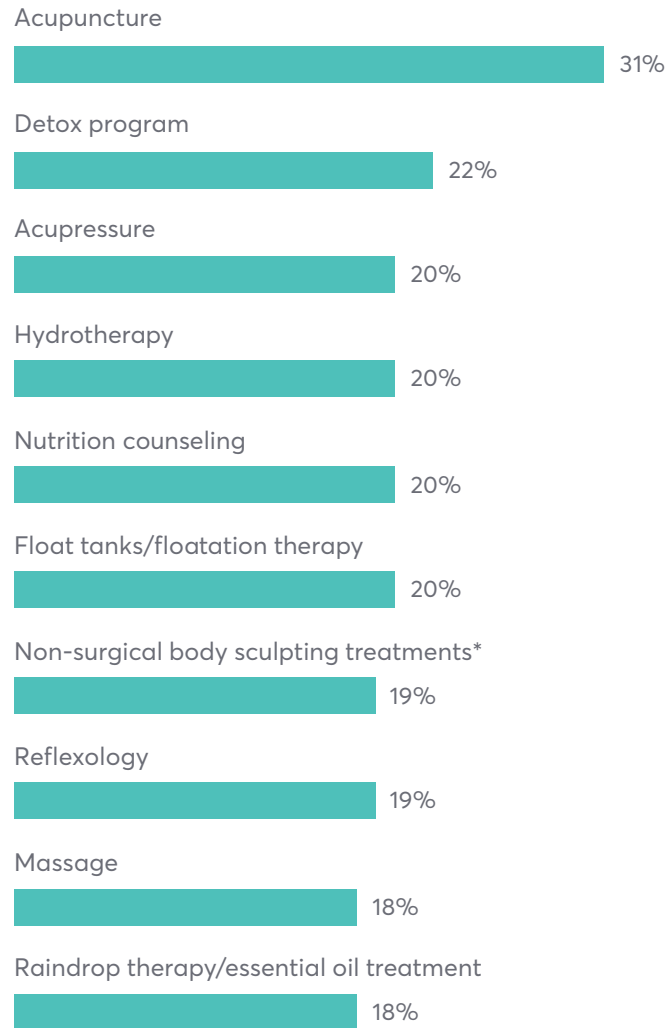


## What services do 26–45 year-olds want to try next?

Figure 4.11

### Top 10 integrative health services among women

(Among those who get services and are interested)



\*Non-surgical body sculpting treatments (e.g., laser or radiofrequency body treatments)

Figure 4.12

### Top 10 integrative health services among men

(Among those who get services and are interested)



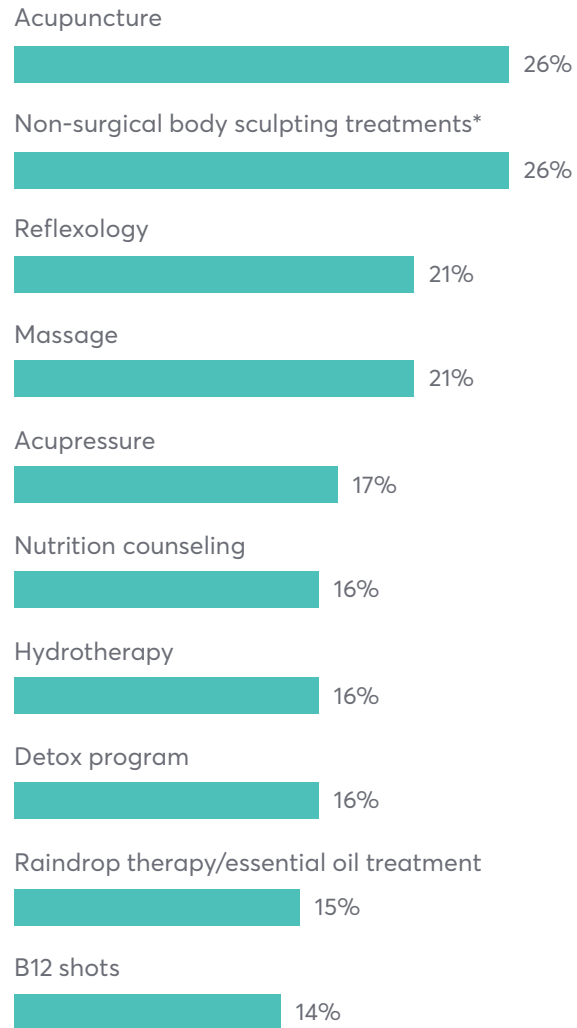


## What services do 46–65 year-olds want to try next?

Figure 4.13

### Top 10 integrative health services among women

(Among those who get services and are interested)

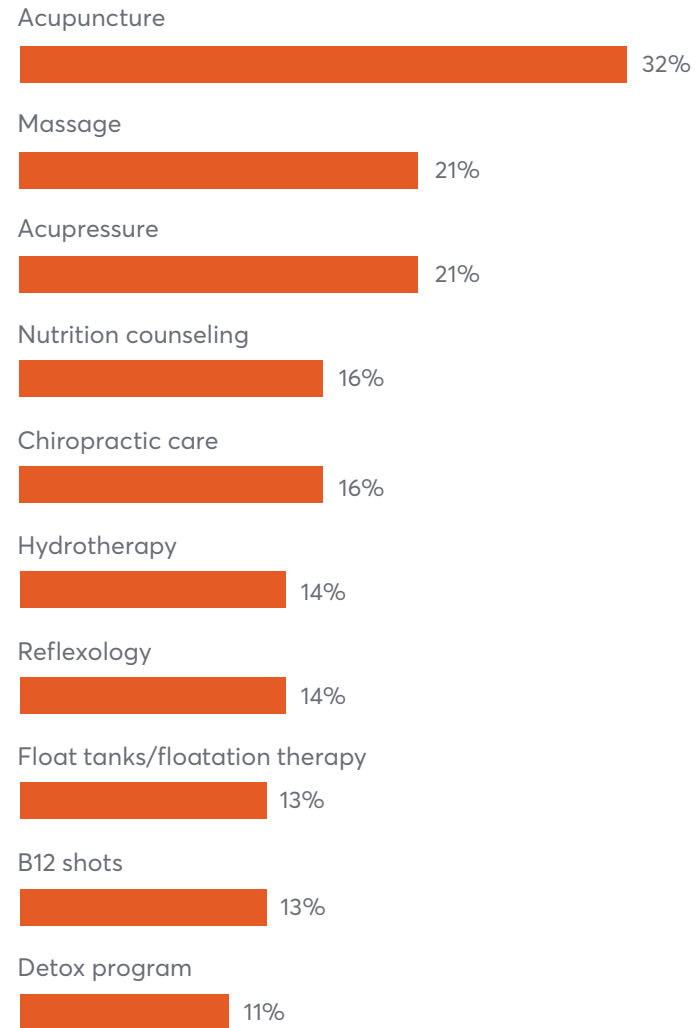


\*Non-surgical body sculpting treatments (e.g., laser or radiofrequency body treatments)

Figure 4.14

### Top 10 integrative health services among men

(Among those who get services and are interested)



# Profile: the typical integrative health consumer

About 36% of integrative health consumers get services three or more times per year. Who are they?

Compared to the average consumer, regular integrative health consumers are more likely to have college or advanced degrees (46% compared to 39%). Consumers also have a higher household income than the average consumer, with \$71,100 compared to \$63,185.

Regular integrative health consumers also invest more in their general wellness. Compared to the average consumer, they spend more on fitness (\$456 versus \$255), beauty (\$588 versus \$387), and integrative health (\$576 versus \$263) every year.

Figure 4.15

## Who is the typical integrative health consumer?

|                                                                                   |                          |     |                                                                                     |                                                                     |                |
|-----------------------------------------------------------------------------------|--------------------------|-----|-------------------------------------------------------------------------------------|---------------------------------------------------------------------|----------------|
|  | <b>Average age</b>       | 39  |  | <b>Education</b>                                                    |                |
|                                                                                   |                          |     |                                                                                     | Up to high school                                                   | 24%            |
|                                                                                   |                          |     |                                                                                     | Trade/technical school                                              | 12%            |
|                                                                                   |                          |     |                                                                                     | Associate's degree                                                  | 18%            |
|                                                                                   |                          |     |                                                                                     | Bachelor's degree                                                   | 32%            |
|                                                                                   |                          |     |                                                                                     | Advanced degree (Master's, PhD, etc.)                               | 14%            |
|  | <b>Employment status</b> |     |  | <b>Mean household income</b>                                        | \$71,100       |
|                                                                                   | Student                  | 13% |                                                                                     |                                                                     |                |
|                                                                                   | Working                  | 69% |                                                                                     |                                                                     |                |
|                                                                                   | Retired                  | 8%  |                                                                                     |                                                                     |                |
|                                                                                   | Not Working              | 16% |                                                                                     |                                                                     |                |
|  | <b>Gender</b>            |     |  | <b>How much are they spending on health and wellness each year?</b> |                |
|                                                                                   | Female                   | 52% |                                                                                     | Fitness                                                             | \$456          |
|                                                                                   | Male                     | 47% |                                                                                     | Beauty                                                              | \$588          |
|                                                                                   |                          |     |                                                                                     | Integrative Health                                                  | \$576          |
|  | <b>Marital status</b>    |     |                                                                                     | <b>Total</b>                                                        | <b>\$1,620</b> |
|                                                                                   | Single                   | 36% |                                                                                     |                                                                     |                |
|                                                                                   | Living with partner      | 10% |                                                                                     |                                                                     |                |
|                                                                                   | Married                  | 44% |                                                                                     |                                                                     |                |
|                                                                                   | Separated                | 2%  |                                                                                     |                                                                     |                |
|                                                                                   | Divorced/widowed         | 9%  |                                                                                     |                                                                     |                |

## Top integrative health services: popularity by metro area

While some services are popular across the map, other services are particularly concentrated in a few metro areas.

On these pages, we've looked at integrative health usage by service type in the top 50 markets in America. We explored top ten most popular integrative health services (as seen on page four). The charts show the markets with the highest and lowest usage by service modality. For example, in looking at massage as a service type, 77% of regular integrative health consumers in the Sacramento market got a massage in the past year, making the Sacramento MSA among the top massage markets in America. Only 43% of integrative health consumers in the Birmingham, AL market tried massage in the past year, making it one of the lowest markets for massage.

## MSAs with the most extreme engagement in the past year in top integrative health services

(Among those who get services three or more times per year)

Figure 4.16

### Chiropractic care



|                                              |       |
|----------------------------------------------|-------|
| Kansas City, MO-KS                           | 43.9% |
| Buffalo-Cheektowaga-Niagara Falls, NY        | 43.0% |
| Denver-Aurora-Lakewood, CO                   | 40.1% |
| Minneapolis-St. Paul-Bloomington, MN-WI      | 38.0% |
| Phoenix-Mesa-Scottsdale, AZ                  | 37.8% |
| Washington-Arlington-Alexandria, DC-VA-MD-WV | 19.3% |
| Baltimore-Columbia-Towson, MD                | 19.1% |
| Los Angeles-Long Beach-Anaheim, CA           | 19.1% |
| Miami-Fort Lauderdale-West Palm Beach, FL    | 15.8% |
| Houston-The Woodlands-Sugar Land, TX         | 15.2% |

### Nutrition counseling



|                                           |       |
|-------------------------------------------|-------|
| Cincinnati, OH-KY-IN                      | 27.8% |
| New York-Newark-Jersey City, NY-NJ-PA     | 24.0% |
| Miami-Fort Lauderdale-West Palm Beach, FL | 23.0% |
| San Antonio-New Braunfels, TX             | 21.2% |
| Jacksonville, FL                          | 20.9% |
| Cleveland-Elyria, OH                      | 11.1% |
| Los Angeles-Long Beach-Anaheim, CA        | 11.0% |
| Atlanta-Sandy Springs-Roswell, GA         | 9.4%  |
| Louisville-Jefferson County, KY-IN        | 9.1%  |
| Minneapolis-St. Paul-Bloomington, MN-WI   | 8.8%  |

### Massage



|                                          |       |
|------------------------------------------|-------|
| Sacramento-Roseville-Arden-Arcade, CA    | 77.4% |
| Denver-Aurora-Lakewood, CO               | 71.7% |
| Tampa St.-Petersburg-Clearwater, FL      | 69.3% |
| Chicago-Naperville-Elgin, IL-IN-WI       | 69.1% |
| Providence-Warwick, RI-MA                | 67.9% |
| Richmond, VA                             | 51.5% |
| Charlotte-Concord-Gastonia, NC-SC        | 48.0% |
| Hartford-West Hartford-East Hartford, CT | 47.2% |
| Buffalo-Cheektowaga-Niagara Falls, NY    | 46.7% |
| Birmingham-Hoover, AL                    | 43.2% |

### Health or life coaching



|                                              |       |
|----------------------------------------------|-------|
| Kansas City, MO-KS                           | 21.4% |
| Washington-Arlington-Alexandria, DC-VA-MD-WV | 21.1% |
| New York-Newark-Jersey City, NY-NJ-PA        | 21.0% |
| Charlotte-Concord-Gastonia, NC-SC            | 20.0% |
| Birmingham-Hoover, AL                        | 19.8% |
| Pittsburgh, PA                               | 9.5%  |
| Minneapolis-St. Paul-Bloomington, MN-WI      | 9.5%  |
| San Francisco-Oakland-Hayward, CA            | 9.1%  |
| Sacramento-Roseville-Arden-Arcade, CA        | 8.5%  |
| Buffalo-Cheektowaga-Niagara Falls, NY        | 8.4%  |

## Acupuncture



|                                           |       |
|-------------------------------------------|-------|
| Portland-Vancouver-Hillsboro, OR-WA       | 26.7% |
| San Jose-Sunnyvale-Santa Clara, CA        | 21.6% |
| San Francisco-Oakland-Hayward, CA         | 20.8% |
| Miami-Fort Lauderdale-West Palm Beach, FL | 20.1% |
| Seattle-Tacoma-Bellevue, WA               | 19.4% |
| Buffalo-Cheektowaga-Niagara Falls, NY     | 5.6%  |
| Birmingham-Hoover, AL                     | 4.9%  |
| Salt Lake City, UT                        | 4.5%  |
| Pittsburgh, PA                            | 3.8%  |
| Indianapolis-Carmel-Anderson, IN          | 1.9%  |

## B12 shots



|                                          |       |
|------------------------------------------|-------|
| Memphis, TN-MS-AR                        | 22.4% |
| Oklahoma City, OK                        | 20.4% |
| Birmingham-Hoover, AL                    | 17.3% |
| San Antonio-New Braunfels, TX            | 15.4% |
| Riverside-San Bernardino-Ontario, CA     | 15.0% |
| Providence-Warwick, RI-MA                | 3.7%  |
| San Jose-Sunnyvale-Santa Clara, CA       | 3.6%  |
| Hartford-West Hartford-East Hartford, CT | 3.4%  |
| St. Louis, MO-IL                         | 2.8%  |
| Richmond, VA                             | 1.0%  |

## Reflexology



|                                            |       |
|--------------------------------------------|-------|
| Las Vegas-Henderson-Paradise, NV           | 16.8% |
| Dallas-Fort Worth-Arlington, TX            | 16.5% |
| New York-Newark-Jersey City, NY-NJ-PA      | 16.0% |
| Phoenix-Mesa-Scottsdale, AZ                | 13.3% |
| San Francisco-Oakland-Hayward, CA          | 13.0% |
| Virginia Beach-Norfolk-Newport News, VA-NC | 4.5%  |
| Minneapolis-St. Paul-Bloomington, MN-WI    | 4.4%  |
| Tampa St.-Petersburg-Clearwater, FL        | 4.4%  |
| San Antonio-New Braunfels, TX              | 3.8%  |
| Indianapolis-Carmel-Anderson, IN           | 3.8%  |

## Acupressure



|                                              |       |
|----------------------------------------------|-------|
| Dallas-Fort Worth-Arlington, TX              | 13.9% |
| Birmingham-Hoover, AL                        | 13.6% |
| San Antonio-New Braunfels, TX                | 12.5% |
| Washington-Arlington-Alexandria, DC-VA-MD-WV | 11.9% |
| San Francisco-Oakland-Hayward, CA            | 11.0% |
| Charlotte-Concord-Gastonia, NC-SC            | 3.2%  |
| Buffalo-Cheektowaga-Niagara Falls, NY        | 2.8%  |
| Virginia Beach-Norfolk-Newport News, VA-NC   | 2.7%  |
| Jacksonville, FL                             | 1.7%  |
| Atlanta-Sandy Springs-Roswell, GA            | 1.6%  |

## Detox program



|                                           |       |
|-------------------------------------------|-------|
| New York-Newark-Jersey City, NY-NJ-PA     | 19.0% |
| Memphis, TN-MS-AR                         | 16.3% |
| Miami-Fort Lauderdale-West Palm Beach, FL | 15.8% |
| Orlando-Kissimmee-Sanford, FL             | 14.2% |
| Riverside-San Bernardino-Ontario, CA      | 12.5% |
| New Orleans-Metairie, LA                  | 5.3%  |
| Hartford-West Hartford-East Hartford, CT  | 4.5%  |
| Cleveland-Elyria, OH                      | 3.4%  |
| Pittsburgh, PA                            | 2.9%  |
| Baltimore-Columbia-Towson, MD             | 0.0%  |

## Alternative healing\*



|                                          |       |
|------------------------------------------|-------|
| Hartford-West Hartford-East Hartford, CT | 13.5% |
| Louisville-Jefferson County, KY-IN       | 10.9% |
| Birmingham-Hoover, AL                    | 9.9%  |
| Salt Lake City, UT                       | 9.8%  |
| Los Angeles-Long Beach-Anaheim, CA       | 9.6%  |
| Baltimore-Columbia-Towson, MD            | 3.5%  |
| Phoenix-Mesa-Scottsdale, AZ              | 3.1%  |
| Sacramento-Roseville-Arden-Arcade, CA    | 2.8%  |
| Cleveland-Elyria, OH                     | 2.6%  |
| Indianapolis-Carmel-Anderson, IN         | 0.0%  |

\*Alternative healing (e.g., Chakra balancing/energy or crystal healing)

## Top integrative health services: interest in trying next by metro area

The following charts show the top ten integrative health services Americans are interested in trying next (as seen on page six). The top five MSAs indicate where the most consumers are looking to try a given service. In Buffalo-Cheektowaga-Niagara Falls, NY, 37.1% of frequent integrative health consumers are interested in trying acupuncture.

The bottom five MSAs indicate the areas where people are least interested in trying a particular service. Only 19.1% of regular integrative health consumers in the St. Louis area want to give acupuncture a try.

## MSAs with the most extreme interest in trying the top integrative health services Americans overall are looking to try

(Among those who get services three or more times per year)

Figure 4.17

● Top Five ● Bottom Five

### Massage



|                                              |       |
|----------------------------------------------|-------|
| Birmingham-Hoover, AL                        | 33.8% |
| Buffalo-Cheektowaga-Niagara Falls, NY        | 32.6% |
| Cleveland-Elyria, OH                         | 32.0% |
| Washington-Arlington-Alexandria, DC-VA-MD-WV | 29.2% |
| Richmond, VA                                 | 28.4% |
| Los Angeles-Long Beach-Anaheim, CA           | 15.8% |
| Sacramento-Roseville-Arden-Arcade, CA        | 12.6% |
| Chicago-Naperville-Elgin, IL-IN-WI           | 12.0% |
| Denver-Aurora-Lakewood, CO                   | 11.4% |
| Dallas-Fort Worth-Arlington, TX              | 11.1% |

### Acupressure



|                                         |       |
|-----------------------------------------|-------|
| Birmingham-Hoover, AL                   | 27.9% |
| Raleigh, NC                             | 25.2% |
| Austin-Round Rock, TX                   | 23.3% |
| Portland-Vancouver-Hillsboro, OR-WA     | 22.9% |
| Seattle-Tacoma-Bellevue, WA             | 22.7% |
| Cleveland-Elyria, OH                    | 12.3% |
| Los Angeles-Long Beach-Anaheim, CA      | 12.2% |
| Atlanta-Sandy Springs-Roswell, GA       | 12.1% |
| Louisville-Jefferson County, KY-IN      | 11.8% |
| Minneapolis-St. Paul-Bloomington, MN-WI | 11.2% |

### Acupuncture



|                                       |       |
|---------------------------------------|-------|
| Buffalo-Cheektowaga-Niagara Falls, NY | 37.1% |
| Austin-Round Rock, TX                 | 36.7% |
| Jacksonville, FL                      | 36.3% |
| Boston-Cambridge-Newton, MA-NH        | 35.3% |
| Atlanta-Sandy Springs-Roswell, GA     | 35.1% |
| Los Angeles-Long Beach-Anaheim, CA    | 22.5% |
| Columbus, OH                          | 21.7% |
| Houston-The Woodlands-Sugar Land, TX  | 21.4% |
| San Francisco-Oakland-Hayward, CA     | 20.6% |
| St. Louis, MO-IL                      | 19.1% |

### Nutrition counseling



|                                          |       |
|------------------------------------------|-------|
| Seattle-Tacoma-Bellevue, WA MSA          | 30.7% |
| Hartford-West Hartford-East Hartford, CT | 30.1% |
| Phoenix-Mesa-Scottsdale, AZ              | 26.3% |
| Dallas-Fort Worth-Arlington, TX          | 23.2% |
| Louisville-Jefferson County, KY-IN       | 22.8% |
| Detroit-Warren-Dearborn, MI              | 11.9% |
| Austin-Round Rock, TX                    | 10.0% |
| San Antonio-New Braunfels, TX            | 9.4%  |
| New Orleans-Metairie, LA                 | 8.4%  |
| Cincinnati, OH-KY-IN                     | 7.1%  |

## Detox program



|                                              |       |
|----------------------------------------------|-------|
| Salt Lake City, UT                           | 25.8% |
| Phoenix-Mesa-Scottsdale, AZ                  | 25.0% |
| Atlanta-Sandy Springs-Roswell, GA            | 24.6% |
| Jacksonville, FL                             | 24.5% |
| Las Vegas-Henderson-Paradise, NV             | 23.1% |
| Nashville-Davidson-Murfreesboro-Franklin, TN | 13.1% |
| Tampa St.-Petersburg-Clearwater, FL          | 12.9% |
| Richmond, VA                                 | 12.5% |
| Buffalo-Cheektowaga-Niagara Falls, NY        | 12.4% |
| Chicago-Naperville-Elgin, IL-IN-WI           | 12.0% |

## Reflexology



|                                             |       |
|---------------------------------------------|-------|
| Portland-Vancouver-Hillsboro, OR-WA         | 24.0% |
| Philadelphia-Camden-Wilmington, PA-NJ-DE-MD | 23.2% |
| Las Vegas-Henderson-Paradise, NV            | 22.3% |
| San Diego-Carlsbad, CA                      | 22.3% |
| Louisville-Jefferson County, KY-IN          | 21.7% |
| Detroit-Warren-Dearborn, MI                 | 11.9% |
| San Jose-Sunnyvale-Santa Clara, CA          | 11.9% |
| Birmingham-Hoover, AL                       | 10.3% |
| Cincinnati, OH-KY-IN                        | 10.0% |
| Cleveland-Elyria, OH                        | 7.8%  |

## Chiropractic care



|                                       |       |
|---------------------------------------|-------|
| Cincinnati, OH-KY-IN                  | 24.3% |
| Portland-Vancouver-Hillsboro, OR-WA   | 24.0% |
| Birmingham-Hoover, AL                 | 23.5% |
| Richmond, VA                          | 22.7% |
| New York-Newark-Jersey City, NY-NJ-PA | 22.2% |
| Las Vegas-Henderson-Paradise, NV      | 12.4% |
| Louisville-Jefferson County, KY-IN    | 10.9% |
| Memphis, TN-MS-AR                     | 10.1% |
| Kansas City, MO-KS                    | 9.5%  |
| Indianapolis-Carmel-Anderson, IN      | 6.9%  |

## Float tanks/floatation therapy



|                                              |       |
|----------------------------------------------|-------|
| Seattle-Tacoma-Bellevue, WA                  | 26.1% |
| Oklahoma City, OK                            | 25.5% |
| Phoenix-Mesa-Scottsdale, AZ                  | 25.0% |
| Richmond, VA                                 | 22.7% |
| Salt Lake City, UT                           | 22.7% |
| New Orleans-Metairie, LA                     | 8.4%  |
| Washington-Arlington-Alexandria, DC-VA-MD-WV | 8.3%  |
| Dallas-Fort Worth-Arlington, TX              | 8.1%  |
| Tampa St.-Petersburg-Clearwater, FL          | 8.1%  |
| Hartford-West Hartford-East Hartford, CT     | 5.5%  |

## Hydrotherapy



|                                          |       |
|------------------------------------------|-------|
| St. Louis, MO-IL                         | 24.5% |
| Cincinnati, OH-KY-IN                     | 22.9% |
| Detroit-Warren-Dearborn, MI              | 22.8% |
| Kansas City, MO-KS                       | 22.6% |
| Columbus, OH                             | 21.7% |
| Richmond, VA                             | 11.4% |
| Riverside-San Bernardino-Ontario, CA     | 11.3% |
| Cleveland-Elyria, OH                     | 10.7% |
| Pittsburgh, PA                           | 10.5% |
| Hartford-West Hartford-East Hartford, CT | 9.6%  |

## Non-surgical body sculpting treatments\*



|                                     |       |
|-------------------------------------|-------|
| Salt Lake City, UT                  | 24.7% |
| Birmingham-Hoover, AL               | 23.5% |
| Denver-Aurora-Lakewood, CO          | 20.7% |
| Phoenix-Mesa-Scottsdale, AZ         | 20.0% |
| Richmond, VA                        | 19.3% |
| San Diego-Carlsbad, CA              | 9.4%  |
| Tampa St.-Petersburg-Clearwater, FL | 7.3%  |
| Detroit-Warren-Dearborn, MI         | 6.9%  |
| Chicago-Naperville-Elgin, IL-IN-WI  | 6.5%  |
| Cincinnati, OH-KY-IN                | 5.7%  |

\*Non-surgical body sculpting treatments (e.g., laser or radiofrequency body treatments)

## New York City spends the most on integrative health

New York-Newark-Jersey City, NY-NJ-PA tops the list of spenders, with the average consumer putting \$50/month or \$600/year towards integrative health services. Cleveland-Elyria, OH invests the least in integrative health, with a monthly spend of \$15 or a yearly spend of \$182.

The average spend for all of the top 50 MSAs is \$22/month, or \$263/year.

Figure 4.18

### Metropolitan Statistical Area (MSA)

### Annual Spend

|    |                                              |       |
|----|----------------------------------------------|-------|
| 1  | New York-Newark-Jersey City, NY-NJ-PA        | \$600 |
| 2  | San Francisco-Oakland-Hayward, CA            | \$418 |
| 3  | Miami-Fort Lauderdale-West Palm Beach, FL    | \$381 |
| 4  | Las Vegas-Henderson-Paradise, NV             | \$349 |
| 5  | Los Angeles-Long Beach-Anaheim, CA           | \$347 |
| 6  | San Jose-Sunnyvale-Santa Clara, CA           | \$346 |
| 7  | Denver-Aurora-Lakewood, CO                   | \$326 |
| 8  | Orlando-Kissimmee-Sanford, FL                | \$322 |
| 9  | Washington-Arlington-Alexandria, DC-VA-MD-WV | \$311 |
| 10 | Austin-Round Rock, TX                        | \$308 |
| 11 | Houston-The Woodlands-Sugar Land, TX         | \$306 |
| 12 | Seattle-Tacoma-Bellevue, WA                  | \$298 |
| 13 | Dallas-Fort Worth-Arlington, TX              | \$296 |
| 14 | San Diego-Carlsbad, CA                       | \$295 |
| 15 | Boston-Cambridge-Newton, MA-NH               | \$291 |
| 16 | Atlanta-Sandy Springs-Roswell, GA            | \$266 |
| 17 | Chicago-Naperville-Elgin, IL-IN-WI           | \$266 |
| 18 | Charlotte-Concord-Gastonia, NC-SC            | \$261 |
| 19 | Kansas City, MO-KS                           | \$257 |
| 20 | Sacramento-Roseville-Arden-Arcade, CA        | \$256 |

|    |                                              |       |
|----|----------------------------------------------|-------|
| 21 | New Orleans-Metairie, LA                     | \$254 |
| 22 | Nashville-Davidson-Murfreesboro-Franklin, TN | \$252 |
| 23 | Raleigh, NC                                  | \$251 |
| 24 | Philadelphia-Camden-Wilmington, PA-NJ-DE-MD  | \$248 |
| 25 | Minneapolis-St. Paul-Bloomington, MN-WI      | \$244 |
| 26 | St. Louis, MO-IL                             | \$236 |
| 27 | Tampa St.-Petersburg-Clearwater, FL          | \$236 |
| 28 | Phoenix-Mesa-Scottsdale, AZ                  | \$235 |
| 29 | Salt Lake City, UT                           | \$235 |
| 30 | Hartford-West Hartford-East Hartford, CT     | \$233 |
| 31 | Oklahoma City, OK                            | \$233 |
| 32 | Riverside-San Bernardino-Ontario, CA         | \$233 |
| 33 | Pittsburgh, PA                               | \$228 |
| 34 | Columbus, OH                                 | \$227 |
| 35 | Portland-Vancouver-Hillsboro, OR-WA          | \$224 |
| 36 | Baltimore-Columbia-Towson, MD                | \$222 |
| 37 | San Antonio-New Braunfels, TX                | \$221 |
| 38 | Memphis, TN-MS-AR                            | \$217 |
| 39 | Cincinnati, OH-KY-IN                         | \$214 |
| 40 | Buffalo-Cheektowaga-Niagara Falls, NY        | \$214 |
| 41 | Providence-Warwick, RI-MA                    | \$211 |
| 42 | Virginia Beach-Norfolk-Newport News, VA-NC   | \$210 |
| 43 | Louisville-Jefferson County, KY-IN           | \$210 |
| 44 | Birmingham-Hoover, AL                        | \$210 |
| 45 | Jacksonville, FL                             | \$206 |
| 46 | Detroit-Warren-Dearborn, MI                  | \$204 |
| 47 | Milwaukee-Waukesha-West Allis, WI            | \$202 |
| 48 | Richmond, VA                                 | \$195 |
| 49 | Indianapolis-Carmel-Anderson, IN             | \$187 |
| 50 | Cleveland-Elyria, OH                         | \$182 |



# The future of integrative health services

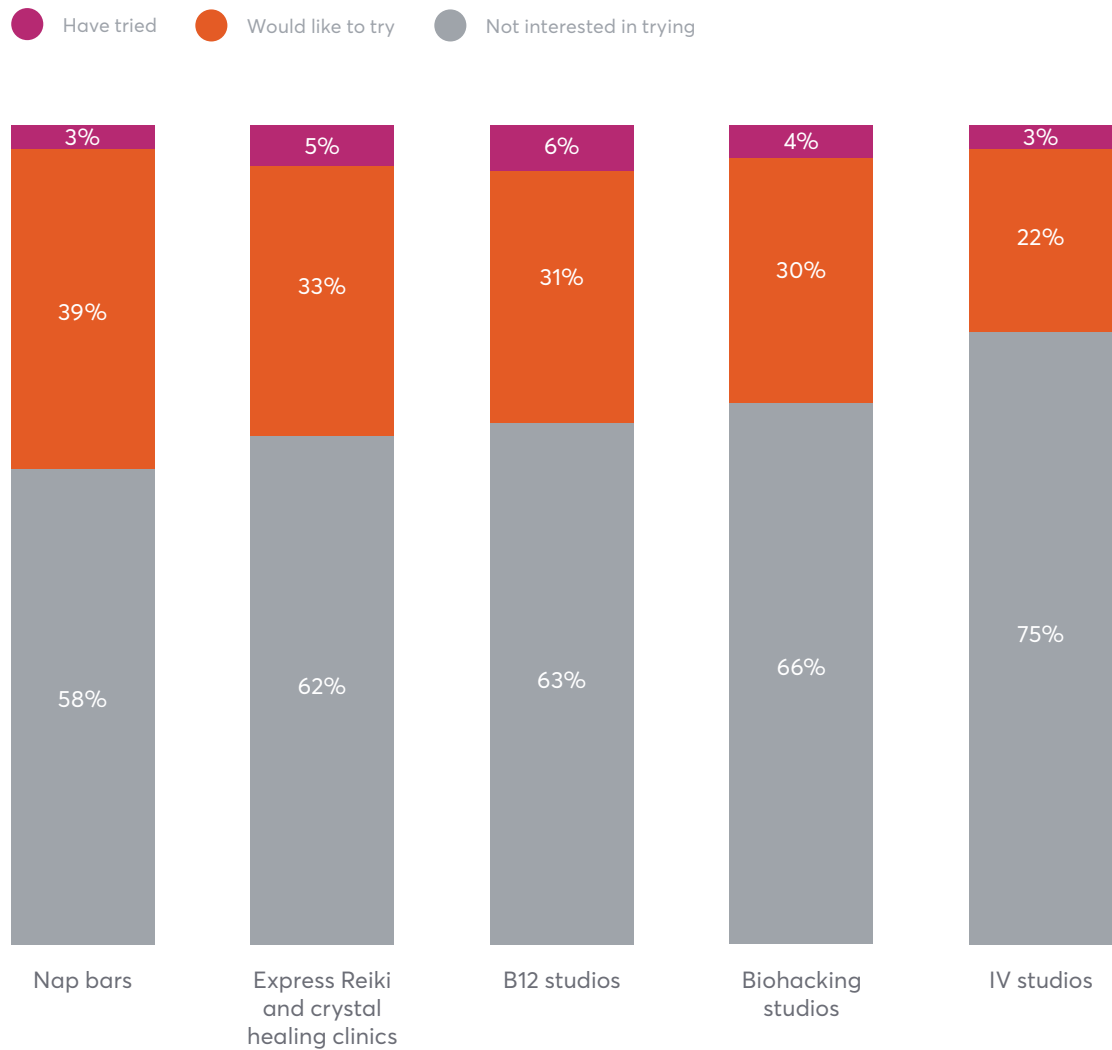
Emerging services like nap bars and B12 studios offer Americans new ways to improve their overall wellness. Only 3% of Americans have tried a nap bar, but 39% are interested. In the high-tech scene, only 4% have visited a biohacking studio, but 30% of Americans want to try this type of service—which includes health and wellness hacks such as neurofeedback, nootropics, and ketogenic diets. Between 2013 and 2017, Google searches for "crystal healing" have increased 40%.<sup>8</sup>

## Examples of new integrative health studios:

- **Nap bars** are hotel-like wellness rooms (like the Dreamery by Casper) that can be rented to sleep, relax, work, or read.
- **Express Reiki and crystal healing clinics** offer Reiki energy healings or crystal healing sessions.
- **B12 studios** offer drop-ins for B12 shots.
- **Biohacking studios** offer the latest technology—everything from headsets and data trackers to oxygen masks—to spend less time sweating and get the same results one would get working out.
- **IV studios** offer IV drip therapy.

Figure 4.19

## Integrative health studios Americans have visited or are interested in visiting



## Glossary

**Acupressure:** Similar to acupuncture, acupressure is the application of finger pressure at specific points on the body to relieve tension or pain.

**Acupuncture:** The insertion of needles into specific points on the body to relieve pain and certain illnesses. Acupuncture points are places on the body where nerves and muscles can be simulated in order to increase blood flow and release the body's natural painkillers.

**Alternative Healing (e.g., Chakra Balancing, Energy Healing, Crystal Healing):** Balancing life energy and cleansing spiritual and emotional health through a vibrational energy-based system of healing.

**B12 Shots:** Used to prevent deficiency or help people who cannot absorb Vitamin B12—which helps the body use fats and carbohydrates for energy and make new protein, among other things.

**B12 Studios:** Wellness studios that offer B12 shots (and oftentimes IV Drip Therapy).

**Biohacking Studios:** In lieu of the traditional gym, these studios offer the latest technology—everything from headsets and data trackers to oxygen masks—to spend less time sweating and get the same results one would get working out. “Biohacking” involves changing the environment around you and inside of you, so you feel more in control of your body.

**Chiropractic Care:** A focus on restoring the musculoskeletal and nervous systems through adjusting the spine. Spinal manipulation involves applying pressure to joints and tissues that have become inflamed and painful or restricted in movement from stressors like improper lifting technique or sitting with bad posture.

**Cryotherapy (e.g., Ice Water Immersion):** Cold air therapy that involves standing inside a chamber of liquid nitrogen or dry, fresh, oxygenated air for 2.5–3.5 minutes, exposing the body to extremely low temperatures (often below -200° F). Studios also offer other cryotherapy services such as facials, or target localized areas on the body. Other ice therapies usually include submerging one's full body in an ice bath for 3–5 minutes. Benefits can include decreased inflammation and speedier recovery time for athletes.

**Detox Program:** An alternative medicine treatment that aims to cleanse the accumulation of “toxins” and impurities in the body.

**Express Facial Bars:** A quicker and cheaper alternative to spa sessions and full-length facials—with high-quality skincare in 30 minutes for as low as \$40.

**Express Med Spa Studios:** Studios that offer BOTOX®, facials, chemical peels, dermal infusions, and other dermatological treatments in a more accessible environment than a medical beauty clinic.

**Express Reiki and Crystal Healing Clinics:** Studios that offer services like Reiki energy healings or crystal healing sessions. For Reiki, practitioners transfer their life force energy to clients' affected areas with their hands. Crystal healing is the same process but with crystals.

**Float Tanks (Floatation Therapy):** An isolation tank—or a sensory deprivation tank—is a lightless, soundproof tank filled with salt water at skin temperature, in which individuals float. The idea behind floatation therapy is that the body is placed in a fully relaxed or even meditative state, removed from external noises or distractions.

**Health or Life Coaching:** Professional guidance used to improve careers and relationships, reach emotional and physical goals, and overall lead a healthy, meaningful, and purpose-driven lifestyle.

**Hormone Therapy:** Replacing or supplementing the natural hormones in the body when it does not make enough, such as for women post-menopause to replace estrogen and progesterone. Some men, especially older men with naturally low levels of testosterone or bodybuilders, may use testosterone injections to increase muscle mass and regulate fat distribution. Hormone therapy can also involve blocking or removing hormones, including those that cause certain types of cancers to grow.

**Hydrotherapy:** The use of ice, steam, or cold or hot water to reduce pain. It can also involve exercising in water to strengthen weak muscles.

**Infrared Sauna:** A sauna that uses light to create heat and directly warms the body as opposed to the air around the person. It has similar effects to moderate exercise, like increased heart rate and sweating, but at a lower temperature than a regular sauna—and can be used to treat chronic health problems.

**IV Studios:** Wellness bars that offer IV Drip Therapy. With around 45-minute sessions, these bars offer a variety of vitamin drips—from “flu drips” and “migraine drips” to “hangover drips” and “jet lag drips”—that can help boost the immune system, promote relaxation, and rehydrate the body.

## Glossary (cont.)

**IV Therapy (Intravenous Vitamin Drip):** The injection of vitamins and minerals directly into the bloodstream.

**Massage:** Kneading muscles and other soft body tissue in order to ease stiffness or pain, usually to reduce stress and anxiety.

**Nap Bars:** Hotel-like wellness rooms (like the Dreamery by Casper) that can be rented to sleep, relax, work, or read. Nap bars are most often found in high-activity areas, including airports or transit hubs and major metropolitan areas like New York City.

**Non-surgical Body Sculpting Treatments:** Treatments used to target fat cells and either destroy them or break them down over time. These include laser therapy, radiofrequency, and ultrasound therapy.

**Nutrition Counseling:** The assessment of a person's dietary intake by a healthcare professional, certified nutrition specialist, or health coach in order to identify where changes need to be made.

**Raindrop Therapy/Essential Oil Treatment:** A combination of reflexology, aromatherapy, massage, and essential oils gently applied onto the spine and feet to promote relaxation.

**Reflexology:** The use of particular pressure points in the hands and feet to increase blood flow and relieve pain.

## About MINDBODY

MINDBODY, Inc. is the leading technology platform for the fitness, wellness, and beauty services industries. Local entrepreneurs worldwide use MINDBODY's integrated software and payments platform to build, market, and successfully run their businesses. Consumers also leverage MINDBODY to more easily find and engage with providers in their local communities. MINDBODY is committed to helping people lead healthier, happier lives by connecting the world to fitness, beauty, and wellness.

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