

WELLSurvey™ 2.0: Wellbeing Overtakes Wellness in U.S., U.K., & Germany; Identifies Global Cohort & Hospitality Brand Gap

Transatlantic study of 2,648 adults in U.S., U.K., Germany connect health to integrated "wellbeing ecosystems" measured by emotional state over activity.

LOS ANGELES, CA, UNITED STATES, May 12, 2026 /EINPresswire.com/ -- Civano Advisors and Yesawich Holding recently released WELLSurvey™ 2.0, a probability survey of 2,648 adults aged 25–74 in the United States, United Kingdom, and Germany. The findings document a fundamental shift in how consumers define, pursue, and evaluate their health: wellness is no longer the goal — wellbeing is.



WELLSurvey™ 2.0 Finds Wellbeing Overtakes Wellness

"The survey reinforced the shift from wellness to wellbeing discovered in [WELLSurvey 1.0](#) and revealed the continuity of attitudes among WELLZoomers in three countries and a surprising leadership opportunity in the wellness travel sector," said Kevin Kelly, CEO of Civano Advisors.

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Consumers view wellness activities as inputs, wellbeing as the integrated outcome of those inputs, and longevity as a measure of whether that outcome is sustained over time.”

Kevin M Kelly, CEO, Civano Advisory Services

From Wellness to Wellbeing

Across all three markets, consumers now treat wellness activities as inputs, wellbeing as the integrated outcome of those inputs, and longevity as the sustained durability of that outcome over time. Half (50%) of respondents reported greater interest in enhancing their wellbeing than

their wellness, and 80% directly associated wellbeing with longevity. Notably, 74% now measure their wellbeing by "how hopeful, joyful, and energized they feel" — making emotional state the primary feedback signal for all health-related activity.

The First Global Wellbeing Cohort

The study identified WELLZoomers™ — adults aged 25 to 44 — as the most consequential consumer segment in the category. Members of this cohort have more in common with one another across borders than with older consumers in their own countries, signaling a truly global market segment with estimated annual spending exceeding \$540 billion worldwide. Despite reporting the highest levels of stress, anxiety, and financial concern of any age group, WELLZoomers respond by intensifying engagement: 95% exercise regularly, 79% track health metrics, 71% use spa or alternative therapies, and 86% plan to visit a wellness facility within the next 12 months.

Trust Is Earned by Science, Not Visibility

Of 11 product and service claims tested, only three were considered trustworthy by a majority: "clinically proven" (71%), "recommended by a scientist or medical professional" (67%), and "evidence-based" (66%). While 83% of respondents access health information via social media, only 49% consider the information reliable.

A Category Without a Leader

Brand preference in wellness hospitality remains strikingly weak. Shown 36 prominent health and wellness-oriented resort brands, 53% of respondents selected "none of the above." Six Senses and Canyon Ranch led the field, each at only 10% — and Six Senses rose to 17% among WELLZoomers, the only meaningful signal of generational alignment in the entire category.

The full report is available at <https://civanoadvisors.com/wellsurvey/>. Or, [Follow this link](#) to read the Report.

About WELLSurvey™ 2.0

WELLSurvey™ 2.0 probability study was conducted online in November 2025 among 2,648 adults aged 25–74 (n=1,026 U.S.; n=804 U.K.; n=818 Germany), all from households in the top half of annual household income in their respective countries. It follows WELLSurvey™ 1.0 (2024, U.S. only).

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