

HOW TO WIN: *health & wellbeing*



HEALTH & WELLBEING. *the opportunity*

The desire for optimum wellbeing is more than just a trend, it's become a profound transformation in how consumers live their lives.

As consumers look to live happier, healthier and longer lives they seek to optimize their choices across multiple facets of wellbeing from curating personalized skin & fitness regime to perfecting the art of sleep. They're open minded and looking cross-category for products and services that offer proactive, reassuring and evidence-based betterment to their daily lives.

\$8.5 Trillion

The expected size of the global wellness industry in 2027 making it twice as large as Germany's GDP.

Over 82%

of UK & US consumers consider wellness a top or important priority in their everyday lives.



FROM CATEGORY-FIRST *to consumer first*

UNDERSERVED *audiences*

Gen Z & Millennials continue to spend the most on their wellbeing.

However older generations, while less represented in the industry are equally open to invest in brands and solutions that help them to enjoy their lives for longer.

EVOLVING *engagement*

Social media is fast-becoming the dominant source of information.

Greater access to knowledge is creating a lack of trust backlash. Consumers are taking back control through demanding recommended, evidence-based & science-backed solutions.

BLURRING *category lines*

Narratives are evolving away from a silver bullet to health.

Consumers appreciate great health is a result of positive and proactive lifestyle choices. They're looking cross-category to find the right solutions to better both their individual mental & physical health.




LANDSCAPE


overview

THE 6 DIMENSIONS *of wellbeing*

The 6 categories of growing interest for consumers driven by increasing access to information, shifting priorities and technology. These present a unique opportunities for innovation and engagement from brands to cater to unmet needs across health and wellbeing.




BETTER
FITNESS





50%

of adults anticipate making gut health a higher priority in the next 2-3 years ¹





BETTER
NUTRITION






BETTER
HEALTH






BETTER
APPEARANCE





+45%

Increase in searches for #skincare on TikTok since 2022 ²




BETTER
SLEEP





BETTER
MINDFULNESS



78%

of UK & US adults agree inadequate sleep impacts their mental wellbeing ³

more physical

more mental

CORE CONSUMER *tensions*

As the category evolves, brands need to be mindful of the tensions that exist for consumers both in their attitude as well as their approach to health and wellbeing routines, rituals and behaviours.

CHANGE *VS* ORDER

CHANGE: in a fast-paced, tech-driven world consumers are open to trying new products and services that can enhance their routines & rituals

ORDER: credibility remains a high priority as consumers want reassurance their investments are going to pay off positively

THE ATTITUDE

SPECIFIC *VS* INTEGRATED

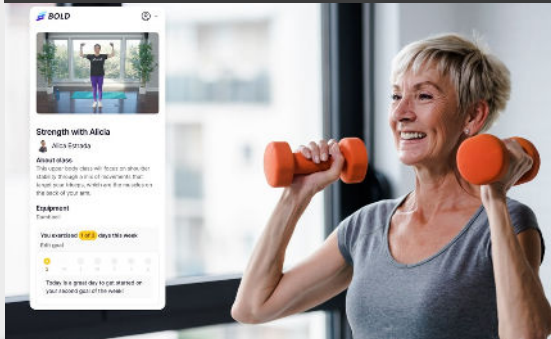
SPECIFIC: driven by efficacy and tailored solutions born from the best of science and technology to address specific concerns and achieve desired results

INTEGRATED: a bigger 'body & mind' practice that can't be seen in isolation from the broader worlds of mental, physical and emotional health

THE APPROACH

EMERGENT *brand examples*

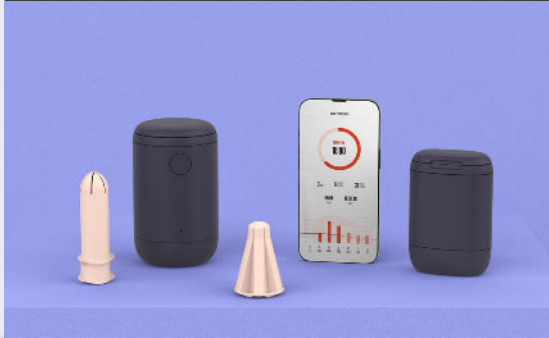
FITNESS FOR THE AGES



Long focused on the aesthetics of youth, the fitness community are turning their attention to the needs of older generations.

Bold is an Ai-assisted fitness platform that creates tailored routines to help tackle the problems of an ageing body, from balance to pain management.

OB-GYN AUTONOMY



Long shrouded by privacy and shame, period products are getting a serious upgrade helping women take control.

Emm is a custom-fit, bio-wearable cup with connected app that monitors, tracks and generates individualized insights based on metrics e.g., volume & flow rate

PROACTIVE SCALP HEALTH



Until now, the fascination with our skin hasn't extended to our scalps but haircare innovation is shifting from reactive to proactive solutions.

Launched in 2020, **MonPure** have clear, benefit-led lines that address real concerns from thinning to menopause without having to re-haul the hair routine.

NEXT GEN SUPPLEMENTS



The supplement format revolution continues as consumers look for integrated solutions that don't compromise on efficacy.

Kloris CBD patches are 'simple, discrete, effective – and completely biodegradable'. They give a sustained dose of active ingredients through the skin.



MAPPING *opportunities*

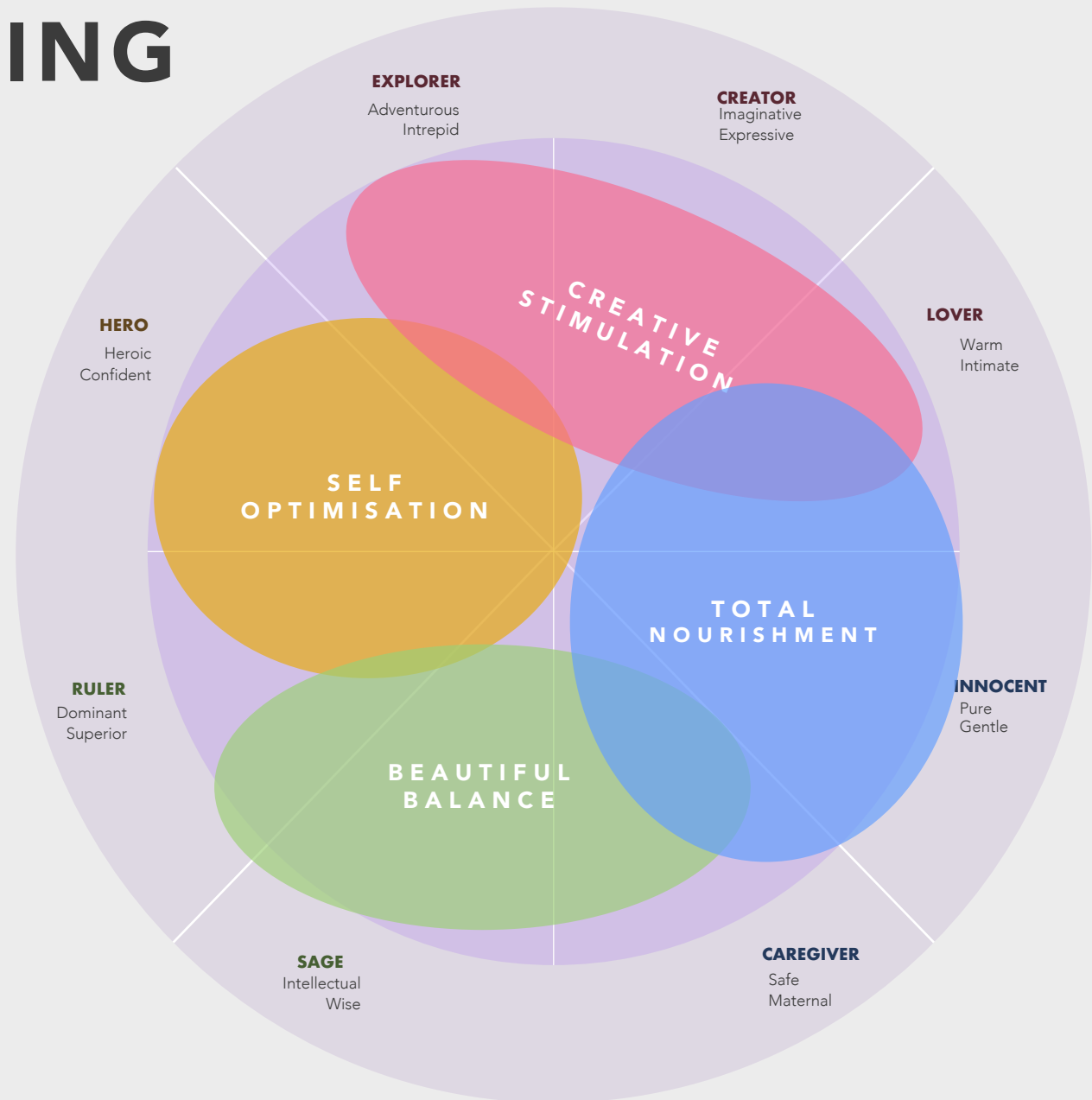
HEALTH & WELLBEING

need map

The map on the right **identifies four fertile, consumer-led opportunity spaces** that can be used as a way in for brand and innovation challenges across health and wellbeing.

The *needmap* roots these opportunities in unchanging consumers needs that will have relevance for the now, next and beyond.

The *archetypes* are indicative of how these spaces may behave & connect with consumers.



OPPORTUNITY AREA

overview

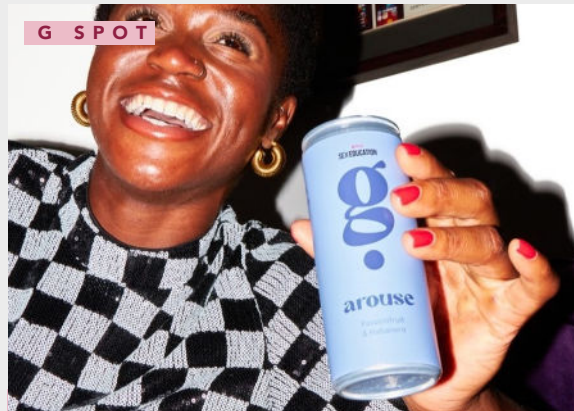


SOLA WAVE

SELF OPTIMISATION

Unlocking maximum potential with a focused and targeted approach to wellbeing.

Blending the latest technology with & expertise to deliver personalized, results driven solutions.



G SPOT

CREATIVE STIMULATION

Prioritising experience and accessibility to open up the world of wellbeing.

Easy to use and understand while bringing an element of joy or self expression to everyday routines.



ZOE

BEAUTIFUL BALANCE

Encouraging and enabling full autonomy over mind and body.

Methodical, empowering solutions that help consumers to regulate and take control of their own health.



BETTER NOT YOUNGER

TOTAL NOURISHMENT

Nourishing what is already there to keep our bodies happy & healthy for longer.

Safe & enriching solutions that proactively defend and comfort against damages & daily stresses.



CONCLUSION

provocations

1 How can you **maintain credibility** while borrowing from adjacent categories?

2 How do you **generate trust** with consumers in a rapidly evolving world of new & conflicting information?

3 What **unmet needs and underserved audiences** exist that you support and cater to with reframed products and services?

For a 45-minute working session unpacking how your brand could capitalize on these evolving opportunity spaces please drop us a line.



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THANK *you*

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