

health & longevity

OUR SELECTED TRENDS,
INSIGHTS & OBSERVATIONS

free the birds®

crowsnest

TRENDS HORIZONS



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1/2 " Clean Tartan
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2 Teaspoons golden Sy
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Welcome

Recent years have seen a fundamental shift in how we approach our health. In how we approach how we care for our bodies. How we approach the ageing process, both physically and mentally.

The longevity movement that has dominated the world of beauty and skincare is reaching into the industries of vitamins, supplements and wellness, strengthening the preventative mindset which has been the leading strategy in healthcare for the majority of people across the globe, following the COVID-19 pandemic.

This major movement is fuelling a phenomenal wave of new opportunities for healthcare brands to rise up and meet the demands of a consumer base that is more informed, more passionate and more willing to invest in a longer, healthier lifespan. More than ever before, consumers of younger ages have a much greater awareness of how we are ageing, witnessing what generations before them have faced and continue to face, and they understand the difference between living longer, and living *well* for longer.

Brands that may have once tackled product development, packaging design, branding and marketing through a much more clinical, pharmaceutical lens are now falling behind if they aren't leaning into the lifestyle-led possibilities which have come about thanks to this new preventative philosophy.

From young consumers conscious of how the future of our planet and the environments in which we spend our time can affect our physical and mental health, to Gen Xers with the spending power to invest in their health and baby boomers who are set to become part of an ageing population that is living longer - and better - this movement is not limited to any single age group.

We therefore invite you to explore how major trends are moving the health and longevity industries forward, through the eyes of unique consumer attitudes.

with thanks to our friends at



52%

52% of consumers believe they will be healthier in the next five years

36%

36% of consumers plan to increase spending on health and wellness

54%

54% of consumers knew which vitamins and supplements to take for their specific health goals and concerns in 2024

63%

63% of consumers identify health with mental wellbeing

4

Global life expectancy is predicted to increase by four years - from 70.7 years in 2010 to 74.5 years in 2030

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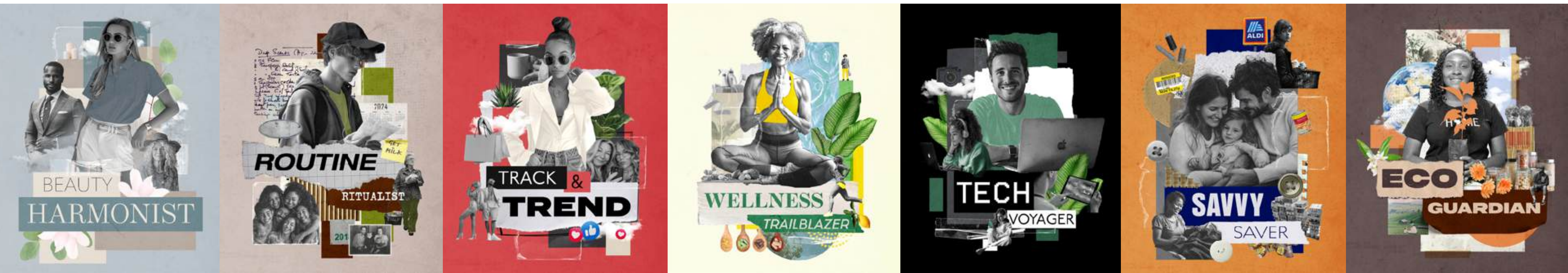
Introducing the attitudes

Here at Free The Birds we don't believe your physical age defines you. Whilst demographics will always have their place, we believe that brands and marketers are too quick to rely upon them. We believe in 'emographics'. The way you behave, the way you think, the way you view the world, says more about you than the number of candles on your birthday cake.

Age-related pigeon-holes are dangerous things to fall into if you're a marketer. There could be consumers who you aren't reaching simply because they were under or over an age limit - even though they potentially relate to your brand.

As a result, our trends insights are related to consumer attitudes not age. We believe that this perspective will prove to be more reflective of human nature and much more inspiring. It certainly is when we are briefing our creative teams. We find that designing and writing for an attitude produces a much stronger connection with the intended consumer.

So, we hope you enjoy seeing all the exciting and thought-provoking new ideas in healthcare and longevity, seen in the context of a variety of consumer attitudes. We feel sure that some of those attitudes will be very familiar to you. And very valuable.



We have created seven consumer attitudes within healthcare and longevity.

All equally relevant and tribes you could be targeting.

You will find that you - and your consumers - identify strongly with a single attitude, but see elements of themselves in several of them, embodying traits across the archetypes.

Introducing the attitudes

The Beauty Harmonist is one who seeks beauty within and out, seeking the highest quality in their purchases; highly efficacious ingredients housed within chic, elevated packaging.

The Routine Ritualist adheres strictly to their daily routines and habits. This includes purchasing products that align with their accustomed standards, and choices often born of habit and often inherited from their parents.

This pursuer of the popular, the Track & Trend diligently follows the latest trends in both household-name and independent, emerging products, believing that conformity to products which are in-demand is the best course of action.

The Wellness Trailblazer prioritises health and tranquility in every aspect of their personal care regime. This includes products they choose for their own and their loved one's personal routines, promoting wellbeing alongside their primary functions.

On a consistent and committed journey through the realm of technology, the Tech Voyager explores advancements and innovations with dedication and enthusiasm in their everyday life.

Driven by a necessary desire to reduce unnecessary spending, the Savvy Saver's purchasing decisions are based upon value for money, from the cheapest option available to capitalising on deals of the moment, or strategic purchases which save them money over time.

Dedicated to protecting and preserving the environment, the Eco Guardian actively seeks to safeguard our planet through a commitment to sustainability in daily choices and consumption habits.



BEAUTY
HARMONIST



ROUTINE
RITUALIST



TRACK
& TREND



WELLNESS
TRAILBLAZER



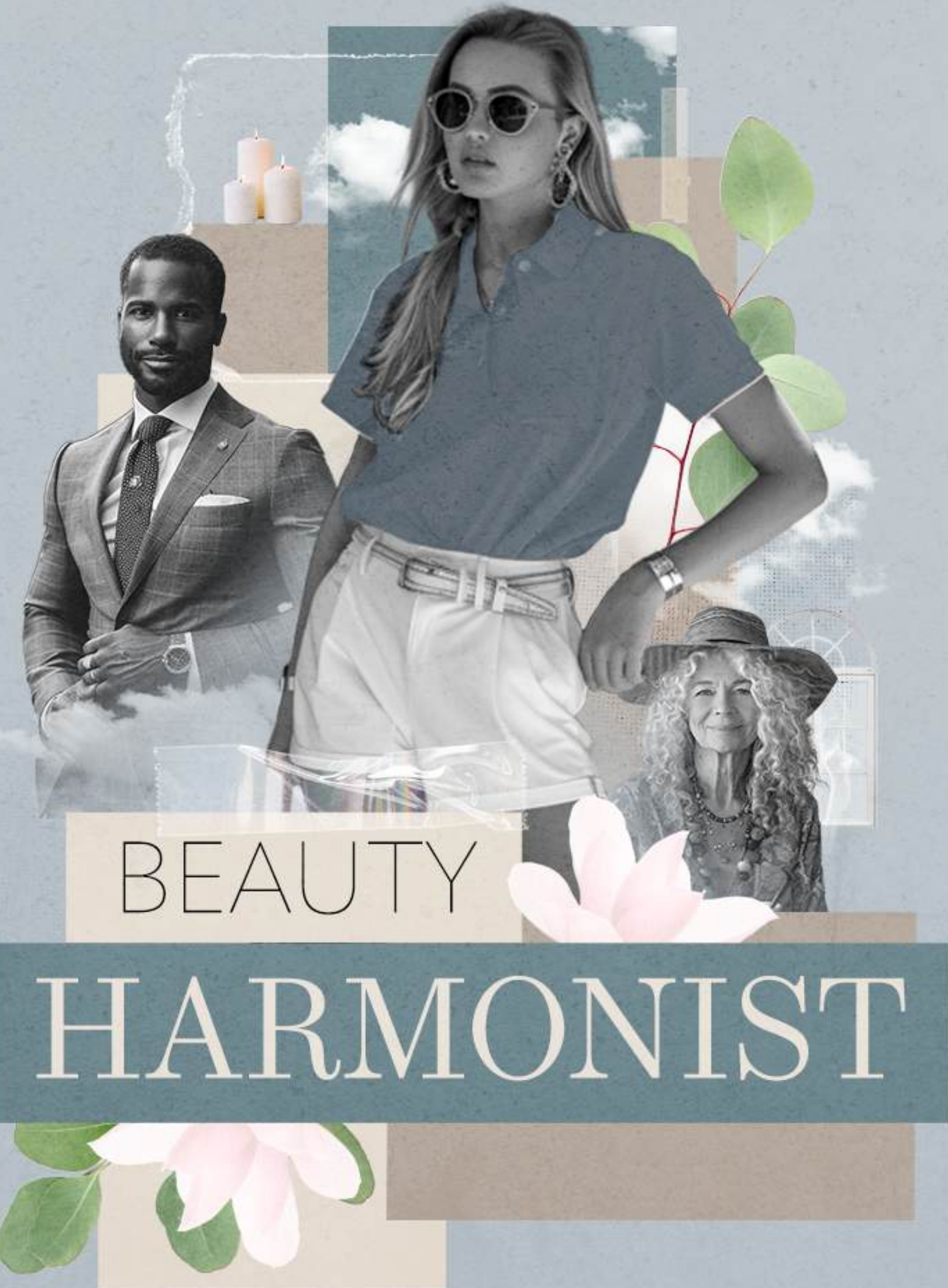
TECH
VOYAGER



SAVVY
SAVER



ECO
GUARDIAN



CONSUMER ATTITUDE

The Beauty Harmonist

Striving for beauty in every aspect, from personal use products to the aesthetics they cultivate in their home, the Beauty Harmonist purchases with the intention of enhancing the beautification of their day to day lives and experiences.

Aesthetic-driven • Beauty-focused • Harmonious • Intentional • Stylish • Design-conscious • Environment-enhancing • Mindful • Detail-oriented • Curated

BEAUTY
HARMONIST

The Beauty Harmonist is one who seeks beauty within and out, seeking the highest quality in their purchases; highly efficacious ingredients housed within chic, elevated packaging.

The pursuit of these high end products speaks to their spending power, as the consumer group that is least affected by the cost of living crisis. However, this attitude also counts customers amongst its ranks who form dedicated bonds with specific brands - brands that are known for their quality and status. Their brand loyalty sees the Beauty Harmonist making committed investments in their wellness regime.

With their understanding that beauty without comes from within, they are champions of ingredients and formulations with the ability to protect and nurture their health and wellbeing, with the end result also being a younger, healthier appearance. Products therefore which benefit factors such as their skin and hair, working as a complementary addition to topical treatments, will appeal greatly to them.

Their ability to spend more on their wellness regime means they are often the first to invest in new and advanced ingredients which routinely hit the market through luxury brands, advanced manufacturers and treatments in high-end clinics. Ingredients such as NAD (nicotinamide adenine dinucleotide, a molecule that supports energy, cell repair, and longevity) and exosomes are prime examples.

When these products and treatments are combined with a luxurious experience, all the better. The Beauty Harmonists are the drivers of the major new movement that is the modern spa and wellness club, and luxury wellness retreats. This also stems from them being first to make the investment in home saunas and ice baths for their garden.

This is also married with sustainability and science. The Beauty Harmonist will research to ensure their investment is of the greatest quality, every ingredient and component selected with purpose by the brands they trust to deliver beautifully for them.

“Global NAD-based Anti-Aging Market is valued at USD 252.0 Million in 2024 and is predicted to reach USD 884.0 Million by the year 2034 at a CAGR of 13.5%.”

Insight Ace Analytic, 2025

The number of products listed as featuring NAD+ online, almost tripled from 409 to 1,137 as of August 2024.

Euromonitor International, 2024

“The wellness real estate market rose to \$438.2 billion in 2023...with the market increasing to a projected \$912.6 billion by 2028.”

Global Wellness Institute, 2024

67% of U.S. beauty buyers now prefer multitasking cosmetics, expecting products that combine skincare and makeup benefits with proven efficacy, from SPF-infused skincare to anti-ageing makeup.

The Benchmarking Company, 2025

“Wellness travellers made 1,034.5 million international and domestic wellness trips in 2023, surpassing their pre-pandemic levels.”

Euromonitor, 2023

Influencing trends

Navigating NAD

Certain ingredients are leading the charge in the new movement that is 'healthspan'. THE ingredient driving this is NAD, beloved by celebrities and Beauty Harmonists alike due to it's cellular repair abilities, naturally supporting the appearance of ageing skin. However it's significance in wellness lies in its reparative properties for damaged DNA. It can support immune functioning, energy and metabolism, with the potential to also support brain health and conceivably reduce the risk of neurodegenerative diseases such as Alzheimers and Parkinson's.

Developments in the growing world of NAD will be in the understanding of its capabilities, and the ability with which we can deliver it into our systems. Having been available predominantly through IV/injector systems to date, new and highly-bioavailable systems will elevate its capabilities. Advancements will come via NAD+-boosting compounds including NR (nicotinamide riboside) and NMN (nicotinamide mononucleotide) being incorporated into products. Brands which are capable of providing personalised NAD products through an exploration of an individual's genomics, will lead the pack.

Aligns with:
Track & Trend



Wellness designed

As immersive retail signals a return to power for bricks and mortar, brands are delivering memorable and highly interactive experiences for consumers. Wellness is no exception, as elevated spa concepts now deliver a sumptuously indulgent customer journey within an evolving longevity movement.

It is the design of these spaces which plays a crucial role in shaping a moment that is unique, refined, and richly sensorial. These environments integrate advanced technology and specialised techniques that support recovery, fitness, and overall mental and physical wellbeing - without allowing scientific elements to overshadow the soothing atmosphere. Instead, guests encounter tranquility and a profound sense of serenity.

Advancements in this spa evolution move beyond these experiences as one-off (or for the lucky few, regular) treats. Instead, they will be incorporated into daily life through large-scale property development and luxurious. Here we will see health and wellness-driven communities living within their own healthspan-enhancing 'bubble', fuelling a vision for towns and cities of the future.

Aligns with:
Tech Voyager



Outer beauty 🤝 Inner wellness

The Beauty Harmonist is the dominating attitude when it comes to investing in the most advanced skincare treatments and products which not only enhance their physical appearance, but their inner beauty (and wellness). Whilst we're already seeing a rise in multi-purpose vitamins and supplements supporting this combination, we anticipate advancements in ingredients, delivery systems and formulations becoming more and more accessible to discerning consumers.

Cutting-edge treatments in longevity and skin rejuvenation are focusing on stem cells, exosomes, and epigenetic reprogramming. These therapies target cellular ageing and offer both beauty and health benefits, such as reversing UV damage and improving skin resilience. The future of stem cell therapies, including adipose-derived stem cells, can improve collagen production, while exosomes enhance elasticity and hydration.

Additionally, epigenetic interventions show promise in resetting cellular age. The use of topical rapamycin offers potential anti-ageing benefits, pushing beauty beyond aesthetics into true rejuvenation at a cellular level.

Clashes with:
Savvy Saver



Unleashing NAD

For the Beauty Harmonist, longevity supplements must be as refined as their surroundings – elevated in design, potent in formulation. They must seamlessly blend beauty and science, delivering cellular rejuvenation in elegantly crafted, highly efficacious forms.

\$912
bn

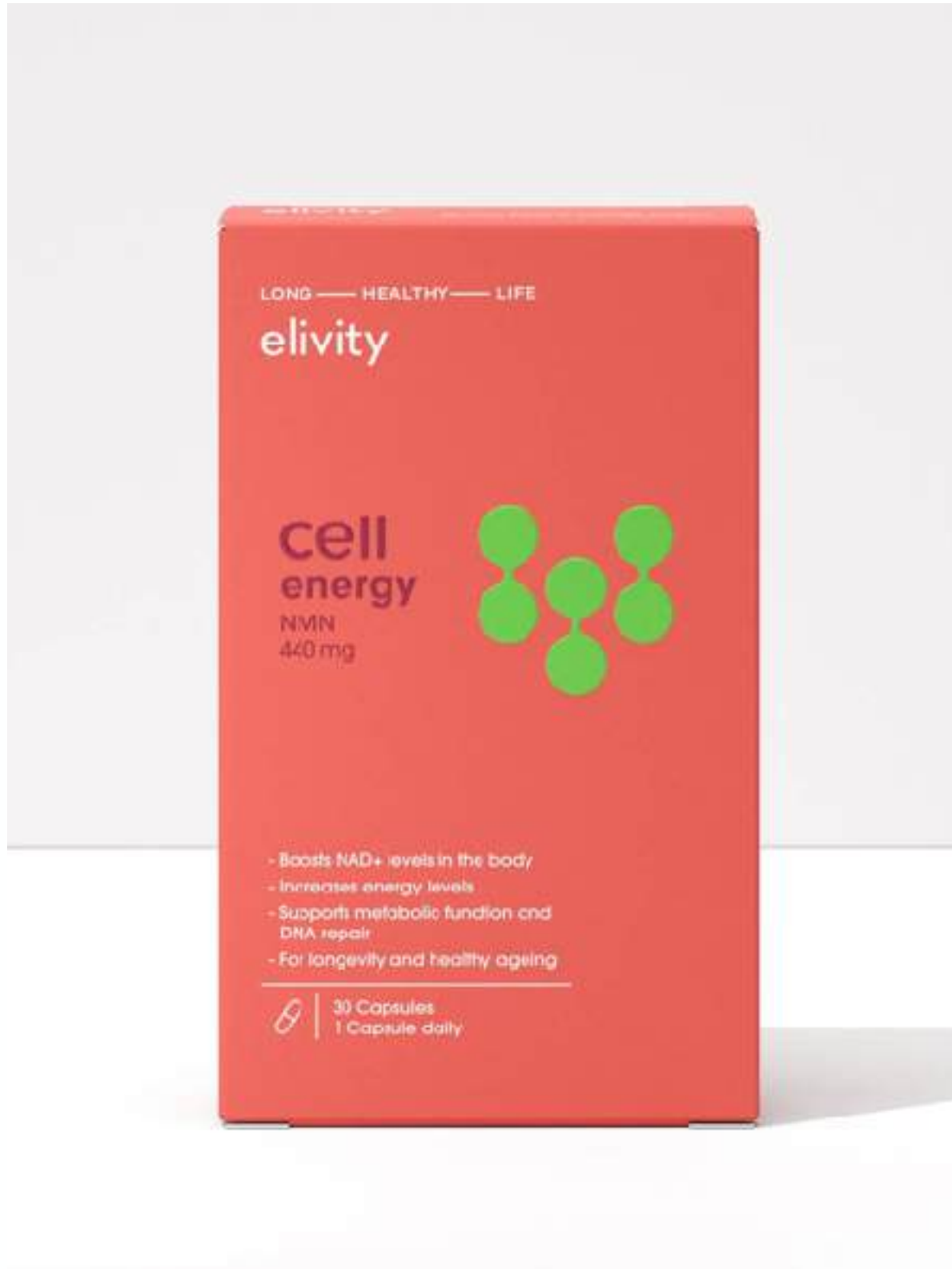
The wellness real estate market is projected to reach \$912.6 billion by 2028.

67%

67% prefer multitasking cosmetics, expecting a combination of skincare and makeup benefits with proven efficacy.

\$884
mn

The Global NAD-based Anti-Ageing Market is predicted to reach \$884 million by the year 2034.



Elivity®

Elivity® specialises in science-backed longevity supplements, focusing on cellular health to combat ageing. Their Cell Energy capsules are formulated with NMN to boost NAD+ levels, enhancing energy, supporting metabolic function, and promoting DNA repair. This targeted approach addresses mitochondrial dysfunction, aiding healthy ageing and vitality.



Kind Patches

This viral brand specialises in transdermal wellness solutions, offering NAD+ Patches to support energy, cellular repair, and healthy ageing. Their slow-release technology ensures optimal absorption, delivering sustained benefits to boost NAD+ levels, enhance vitality, aid DNA repair, and protect against oxidative stress for long-term health and resilience.



Happy Aging

Happy Aging offers the NAD+ Longevity Shot, a liposomal mixed berry supplement designed to boost NAD+ levels for cellular repair and energy. Formulated with nicotinamide riboside, resveratrol, and antioxidants, it enhances metabolism, supports skin elasticity, reduces oxidative stress, and promotes vitality for healthy ageing in a convenient dose.



IM8

IM8, co-founded by David Beckham, offers Daily Ultimate Longevity, a supplement designed to promote healthy ageing. Featuring Cell Rejuvenation Technology 8® and NAD3® Complex, it targets key ageing factors, supports NAD+ levels, and enhances cellular energy, cognitive function, and heart health.

A centre for wellness

Wellness is an art - where efficacy meets aesthetics. Modern spas offer exquisitely designed, science-backed sanctuaries featuring curated treatments, luxurious settings, and holistic therapies, which elevate daily rituals into intentional, transformative experiences.

\$912
bn

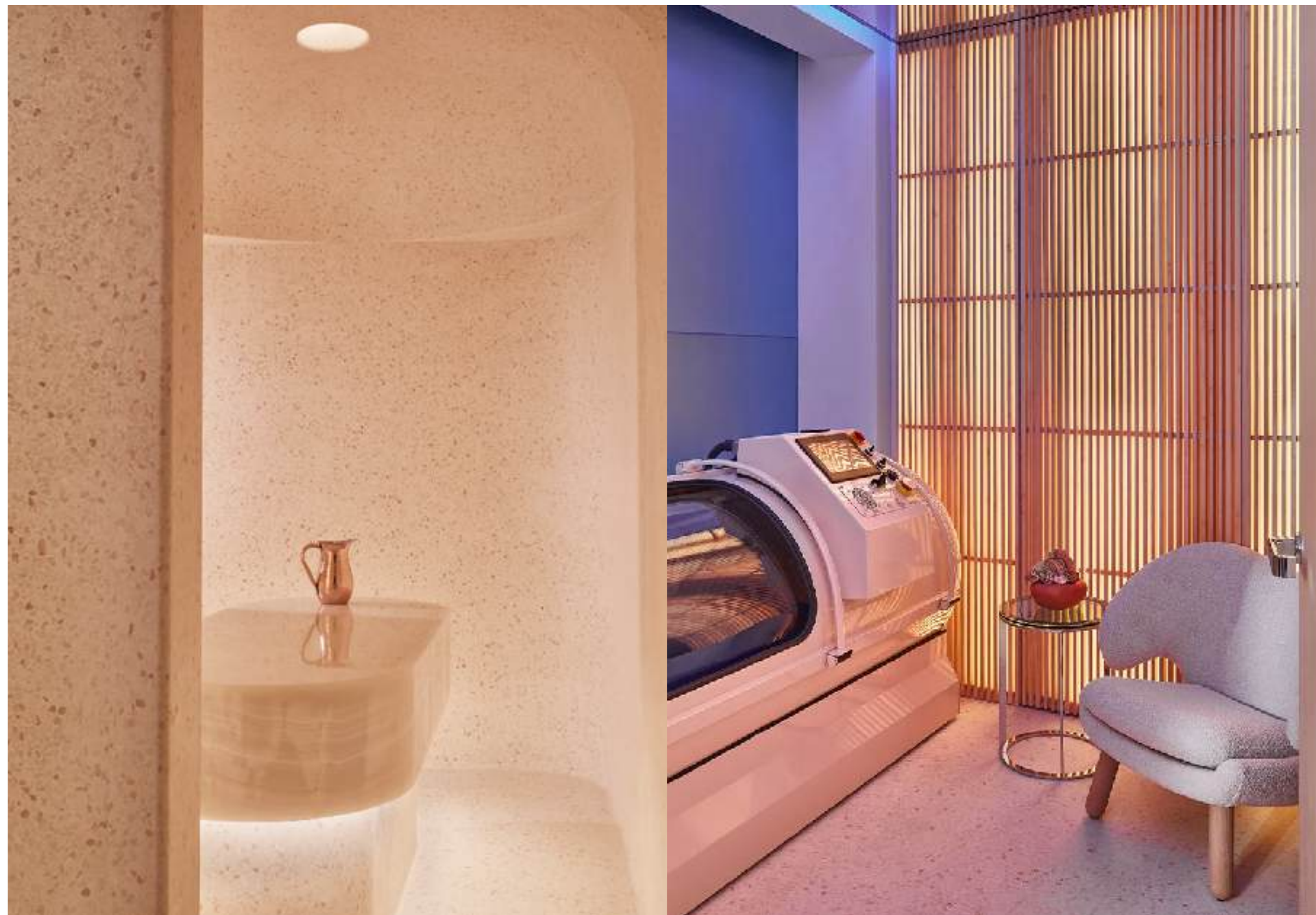
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Surrenne

Nestled in Belgravia, London, Surrenne offers a holistic approach to wellness and longevity. Spanning four floors, the club blends natural elements with modern science to offer members state-of-the-art fitness facilities, personalised health assessments, and treatments designed to rejuvenate mind and body. Signature offerings include four-hand massages, adaptogenic therapies, and advanced facials. Collaborations with experts ensure cutting-edge longevity programmes., whilst the Café complements this with nutrient-rich cuisine to support metabolic health and overall wellbeing. Surrenne empowers guests to age beautifully, and maintain optimal health.



Rebase Recovery

Offering a comprehensive approach to social wellness, Rebase blends cutting-edge science with ancient practices to promote holistic wellbeing. The facility's design draws inspiration from natural materials, creating a calming and grounding atmosphere. Members have access to state-of-the-art amenities, including cryotherapy chambers, Full Spectrum infrared saunas, and a hyperbaric oxygen chamber. Ice baths, traditional Finnish saunas, breathwork sessions, and yoga classes, are all tailored to rejuvenate both mind and body. The centre also provides private contrast suites, allowing for personalised experiences that combine sauna use with cold immersion therapies.

A beautiful connection

For the Beauty Harmonist, beauty and longevity are inseparable. Scientifically advanced, aesthetically refined formulations should nourish from within, elevating daily rituals by fusing potent biotechnology and luxurious design.

\$912
bn

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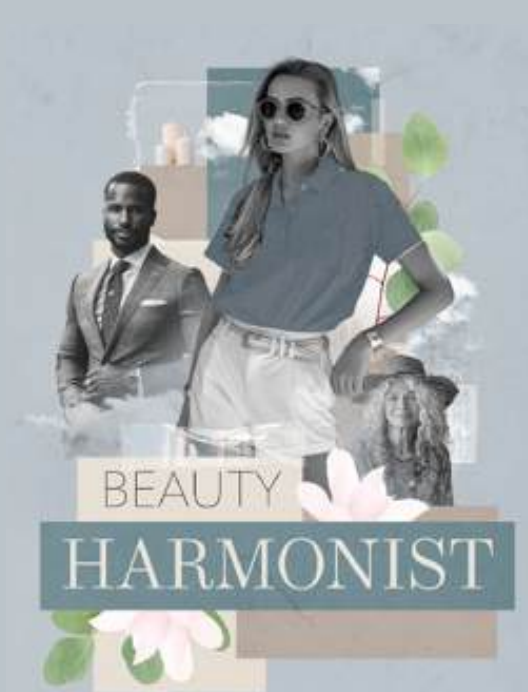
XO Supreme

Redefining beauty through the lens of longevity, XO Supreme merges biotechnology with high-performance skincare and haircare. At the heart of its innovation is XO-Gen™ Technology, a potent fusion of exosomes, peptides, and growth factors designed to rejuvenate at a cellular level. Backed by leading biochemists, XO Supreme's formulas deliver transformative results, supporting both aesthetic enhancement and deep biological repair. Championing the synergy between beauty and wellbeing, the brand aligns with the longevity movement's focus on science-led, results-driven solutions for ageing gracefully.



Agent Nateur

Agent Nateur harmoniously blends luxury and wellness, offering eco-certified, natural skincare and personal care products that cater to discerning consumers seeking both efficacy and purity. Founded by Jena Covello, the brand emerged from a personal quest for non-toxic beauty solutions, leading to meticulously crafted formulations free from harmful chemicals. Products like the holi (mane) supplement and holi (oil) serum exemplify their commitment to enhancing beauty through clean, potent ingredients. A dedication to sustainability and transparency aligns seamlessly with the longevity movement, promoting holistic health alongside aesthetic excellence.



Brands should tap into the **Beauty Harmonist** consumer attitude to leverage their desire for aesthetically-pleasing products. Neighbouring attitudes like the Wellness Trailblazer, Tech Voyager, and Track & Trend share values of wellbeing, sustainability, and modern style, unlocking significant marketing potential by appealing to consumers who prioritise beauty and current trends.

How brands can engage with this consumer attitude:

Premium Pricing: Given their focus on aesthetics and quality, these consumers are often willing to pay a premium for products that meet their high standards for beauty and design.

Brand Loyalty: By consistently delivering products that enhance both personal and environmental beauty, brands can foster strong loyalty among these consumers.

Customer Insights: Feedback from these detail-oriented consumers can provide valuable insights into product improvements and innovations, driving better product development.

Market Differentiation: Brands that successfully cater to this consumer type can differentiate themselves in crowded markets by emphasising design and aesthetic value in their products.

Influence on Trends: These consumers are often trendsetters due to their focus on aesthetics and design, making them valuable for brands looking to stay ahead of market trends.

Enhanced Brand Image: Associating with consumers who emphasise beauty and harmony can improve a brand's image, positioning it as sophisticated and high-end.

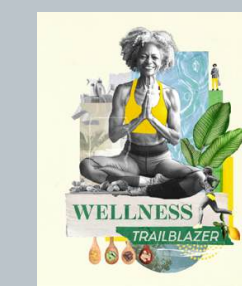
Cross-Selling Opportunities: Since Beauty Harmonists seek coherence in their routines and environments, they are more likely to purchase multiple products that contribute to a unified aesthetic, providing brands with opportunities for cross-selling.

Long-Term Engagement: By engaging consumers who appreciate aesthetics with complexity, depth and efficacy behind it, brands can create long-term relationships based on shared values.

Social Media Visibility: Beauty Harmonists are likely to share their beautifully curated spaces and products on social media, increasing brand visibility and engagement through visually compelling content.

Word-of-Mouth Promotion: Beauty Harmonists, who often take pride in their curated regimes, are likely to recommend brands that align with their aesthetic values to friends and family, enhancing organic growth.

These attitudes share a focus on aesthetics, harmony, and modernity, making them complementary to the Beauty Harmonist. Brands can leverage this by promoting products that are not only beautiful and stylish but also support wellness and sustainability.



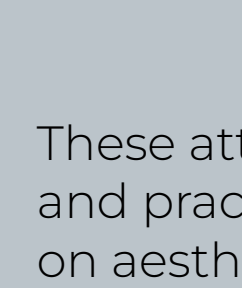
The Wellness Trailblazer
This group prioritises health and tranquility, often valuing natural and aesthetically-pleasing products that promote a holistic approach to wellbeing. The Beauty Harmonist's focus on aesthetics and harmony aligns well with the Wellness Trailblazer's emphasis on products that enhance inner and outer beauty, making it a natural fit for brands to appeal to both groups.



The Tech Voyager
This group is primarily focused on the latest technological advancements and cutting-edge gadgets, which often aligns with the goals of the Beauty Harmonist in achieving the most sleek and efficacious products in their routine. Their desire for slick, modern tools which utilise technology to perfect a routine, make the use of luxury treatment methods as well as the visual appeal of the tools themselves, appealing to the Harmonist's goal of overall beautification.



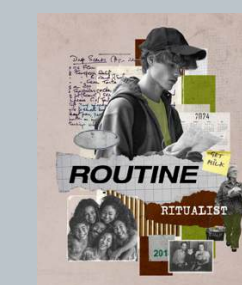
The Track & Trend
Followers of the latest trends and mainstream popularity, this group appreciates stylish and fashionable products. The Beauty Harmonist's focus on aesthetics makes this group highly aligned with the Track & Trend attitude, as both are likely to be drawn to products that are visually appealing and produce Instagrammable results for their channels and their followers. Brands can attract both by emphasising the stylish and contemporary design elements and results of their products.



The Eco Guardian
This consumer type is dedicated to sustainability and environmental protection. As the Beauty Harmonist values products and ingredients for their advanced efficacy and beautiful packaging, the method by which ingredients are sourced and formulations produced is of primary importance, more so than the health of our planet. The Eco Guardian champions environmentally-friendly ingredients and packaging, whether aesthetically-pleasing to the eye or not.



The Savvy Saver
This consumer type prioritises economical choices and value for money, often focusing on cost-effectiveness over aesthetics. Their primary concern is reducing unnecessary spending, which can conflict with the Beauty Harmonist's willingness to invest in visually pleasing and often premium products.

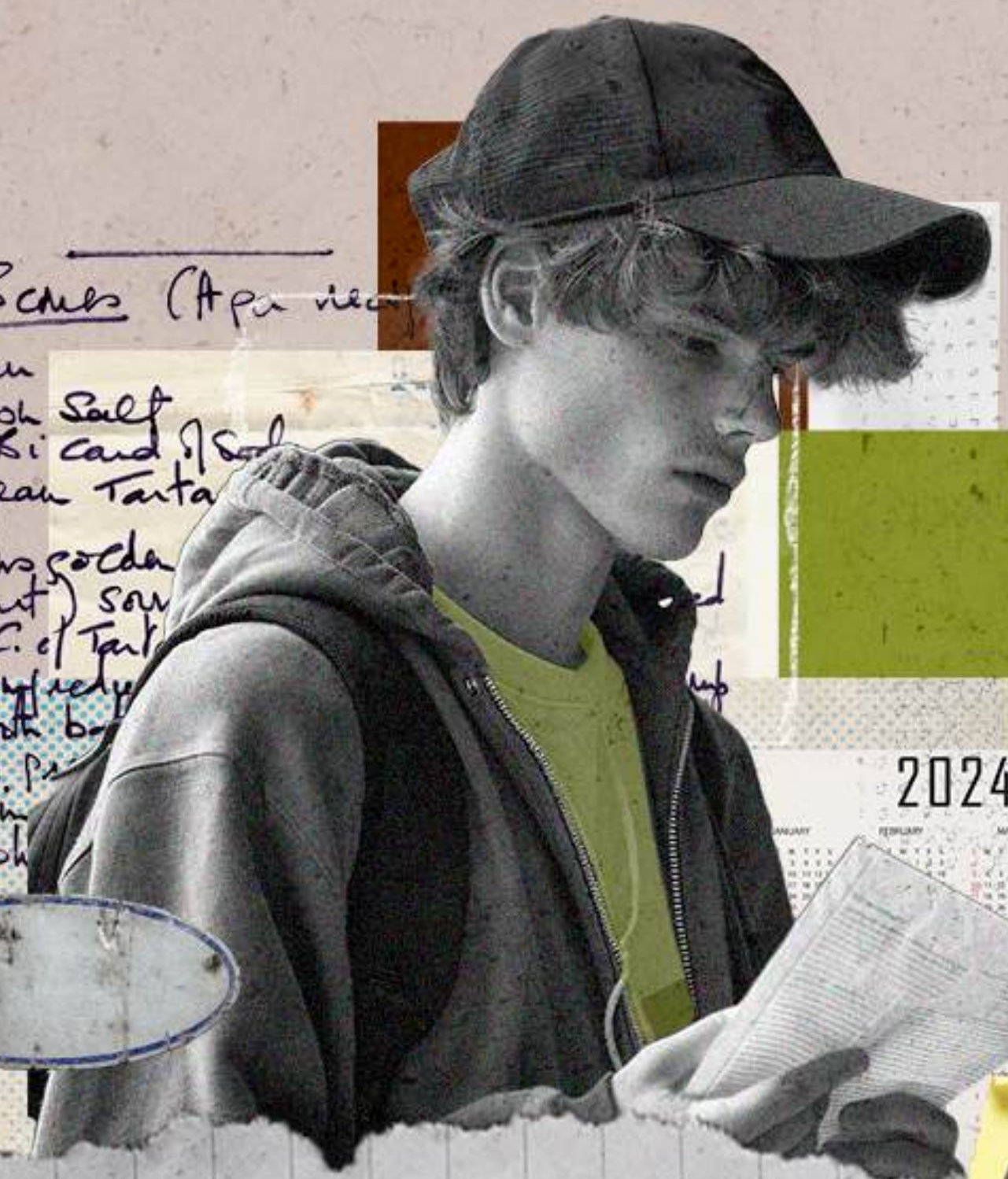


The Routine Ritualist
Preferring consistency and familiarity, this group values stability and practicality over aesthetics. The Routine Ritualist's focus on established habits and reliable products contrasts with the Beauty Harmonist's desire for elevated beauty in their routine, and their willingness to try new products which might add to this routine. Both factors make these two groups less aligned in purchasing motivations.



Drop Scales (Apr 1950)

3 1/2 cups Flour
1/2 Teaspoon Salt
1/2 cup Bicarb of Soda
1/2 cup Clean Tartar
1/2 an Egg
2 Teaspoons Soda
1/2 pt (Scant) sou
1/2 cup C. of Tart
Sift Dry ingredi
mix to smooth b
beat pan, pa
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2024

GET MILK

ROUTINE

RITUALIST



201



CONSUMER ATTITUDE

The Routine Ritualist

The Routine Ritualist adheres strictly to their daily routines and habits. This includes purchasing products that align with their accustomed standards, and choices often born of habit and often inherited from their parents.

- Habitual • Consistent • Loyal • Traditional • Predictable • Routine-oriented
- Disciplined • Familiar • Reliable • Heritage-focused

The **Routine Ritualist** is perhaps the most difficult of attitudes to steal share from. The means by which a breakthrough with this group can be achieved is incremental innovation from heritage brands.

Like the Beauty Harmonist, the Routine Ritualist is committed to quality. However their choice of purchase is driven by experience - often over a period of years - where their hero products consistently deliver for them and their routine.

Quality here also speaks to simplicity. Thriving in ease and regularity of their routine, multi-purpose, highly functional products are championed. A Routine Ritualist will not add a new product to their routine unless they are confident that it works exactly as it says on the tin - or if it is highly personalised to them and their needs.

For a Routine Ritualist, the opportunity to welcome a product specifically tailored to them is irresistible. It becomes a seamless addition to their regime — even saving them time — and is met with open arms and wallets. They are willing to make an investment in a brand which promises them tangible support and evident results. For those who aren't able to spend as much on a personalised subscription-based product, efficacious multi-purpose vitamins which offer multiple health benefits in an efficient manner are also appealing.

Their desire for consistency is highly comforting for heritage, household-name brands who have been present on shelves for decades. The Routine Ritualist is often committed to purchasing brands their parents use. These leading brands can retain their loyal customers through innovation in product development, safe in the knowledge that additions to ranges or new formulations in hero products will be snapped up by these customers.

You will find Routine Ritualists of all ages, from those who have been dedicated consumers for years, to younger audiences inheriting habits. They struggle to move on from their committed habits, even when reaching significant life stages which can put different demands on their body - they will remain loyal to the brands and products that have served them for years.

“82% of US consumers now consider wellness a top or important priority in their everyday lives, similar to the 87% and 73% who say so in China and the UK, respectively”

Mintel, 2024

“69% of consumers are likely to conduct further research online or on social media” after encountering health and wellness content.”

Healthline, 2023

“The global Hormonal health supplements industry is estimated to be worth USD 3,595.0 Million by 2024.”

Future Market Insights, 2024

“The global personalised nutrition and supplements market size was estimated at USD 14.02 billion in 2024 and is expected to grow at a CAGR of 14.59% from 2025 to 2030.”

Grand View Research, 2024

“It is projected to reach USD 7,409.4 Million by 2034.”

Future Market Insights, 2024

Influencing trends

Let's get personal

The democratisation of ultra personalised vitamins and supplements which support an individual's specific needs for ageing well and living longer more healthily, is making it possible for consumers like the Routine Ritualist to make healthy additions to their regime, and track their effects, on a daily basis.

This significant trend is driven by the new healthcare age we live in following the impact of Covid-19 on our approach to health. Today consumers champion a preventative mindset, endeavouring to recognise the symptoms of potential issues at their earliest stages, based upon an understanding of not only their environment, but also what their physical make-up makes them susceptible to.

A combination of continuously advancing research and progressive and accessible technology is making it possible for brands to offer a product which is highly nuanced. In addition to understanding and providing for a high number of factors (which go right the way down to our microbiome and the ways our genes are expressed), these services can track the effects of supplementation to tweak and perfect the program.

Clashes with:
Savvy Saver



The new age of self-care

Amongst the growing phenomenon that is ultra-personalised VMS products, is a more knowledgeable and informed consumer. This is likely to accelerate, due to increasing worry that health enthusiasts today are at heightened risk of polypharmacy as they take their health more proactively into their own hands.

This shift toward self-directed healthcare is being fuelled by a significant rise in social media platforms being used as research for health concerns and accompanying solutions, combined with the ease of ordering VMS products via e-commerce and mail order pharmacies.

This, however, is also exacerbating concerns around polypharmacy, where multiple supplements and medications - where not carefully managed - can interact with each other in negative ways, be it cancelling out the effects of each or having a detrimental effect on the body. Amidst the rise of smart multi-vitamins, we also expect to see the application of AI-driven tools which can regulate what we take and ensure it complements one another.

Aligns with:
Wellness Trailblazer



The balance of your body

The significance of our hormones on our wider health has long been recognised by women as having a significant effect on our daily wellbeing, and is most often considered during major changes to them at pivotal moments in our lives, such as the menopause.

However a menopause management revolution is on the horizon, as the benefits of effective management of our hormones can positively impact cardiovascular, musculoskeletal and brain health. With the maintenance of brain health considered to be one of the most significant factors to effect longevity and our healthspan, growing accessibility again to AI and wearable technology which can track how our hormones are being regulated can positively influence the health of this vital organ.

A growing number of products which help to balance our bodies and subsequently reduce the effects of an imbalance are set to significantly grow in popularity. We're already seeing it in the phenomenal popularity of supplements such as multiple forms of magnesium, vitamin C, and natural herb, ashwagandha.

Aligns with:
Beauty Harmonist



Let's get personal

Longevity is about consistency and science-backed optimisation. Personalised wellness solutions that seamlessly integrate into established routines through a targeted, data-driven approach, can provide reliable, habitual enhancements to health, without disrupting daily practices.

69%

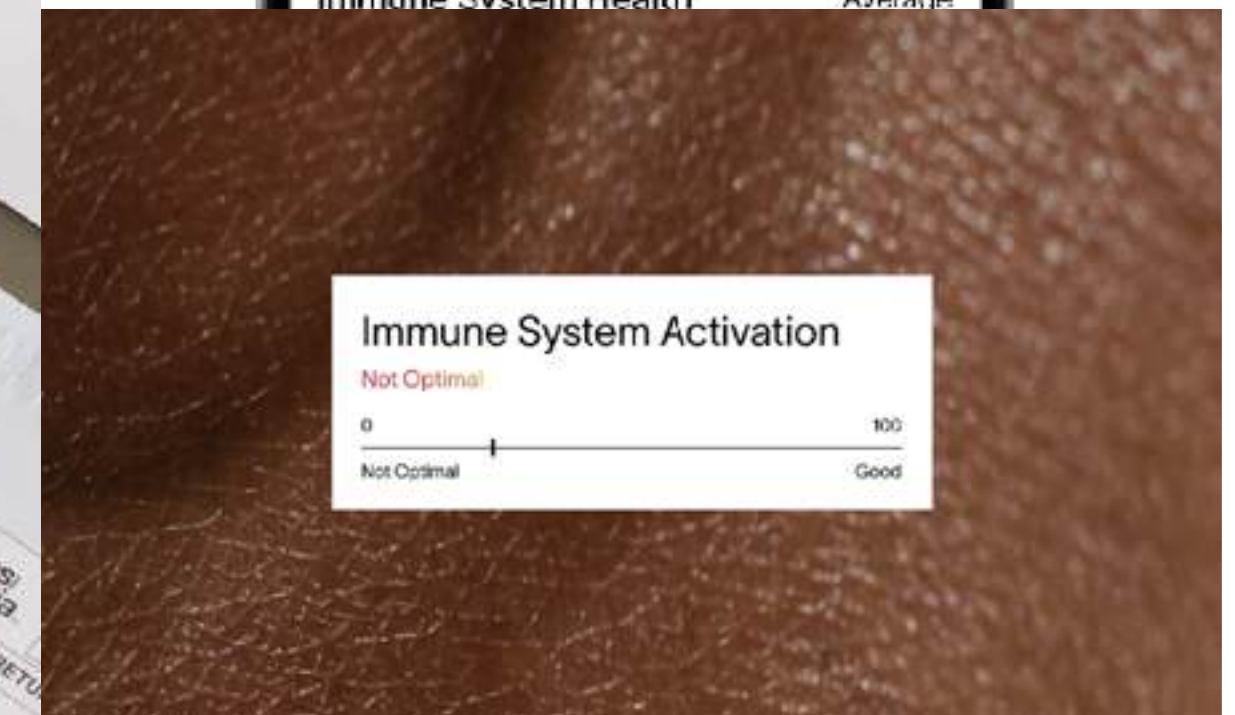
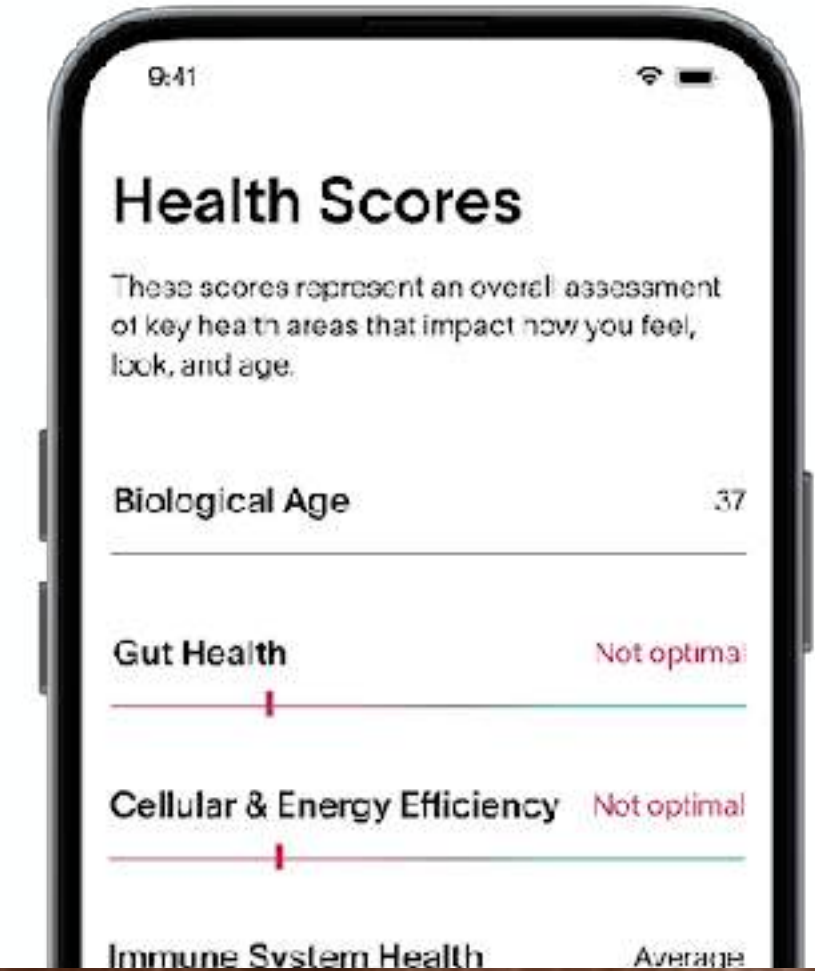
69% of consumers conduct further research online or on social media after encountering health and wellness content.

\$438 bn

The wellness real estate market rose to \$438.2 billion in 2023.

\$14 bn

The global personalised supplements market size was estimated at \$14.02 billion in 2024.



Jung+

Jung+ Longevity is redefining wellness through personalised longevity solutions. Their Total Longevity System™ starts with the Longevity Foundation, a master formula targeting 12 ageing drivers through a 24/7 supplement protocol. Users can tailor their regimen with precision-engineered boosters, including Fasting Tonic, Advanced Sleep Repair, Cellular Skin Renewal, and Glucose Blocker, aligning with individual health goals. By making scientifically-backed longevity care more accessible, Jung+ bridges the gap between high-end clinics and everyday, personalised wellness optimisation.

Viome

Viome harnesses advanced artificial intelligence to deliver personalised health insights, analysing individual microbiomes and gene expressions to craft tailored nutrition and supplement recommendations. Their comprehensive at-home tests evaluate gut and oral health, offering over 50 health scores and biological age assessments. By focusing on the root causes of health issues, Viome empowers individuals to make informed dietary and lifestyle choices, aligning with the longevity and wellness movement's emphasis on customised, science-backed interventions for optimal health.

Multi-purpose magic

For the Routine Ritualist, longevity must fit seamlessly into established habits, championing multi-purpose supplements with targeted formulations rooted in trusted wellness principles. Reliable, incremental innovations for those seeking consistency in their longevity journey.

69%

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\$438
bn

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The global personalised supplements market size was estimated at \$14.02 billion in 2024.



Skin Diligent

Skin Diligent are the pioneers of epigenetic skincare, combining advanced biotechnology with natural ingredients, and featuring new branding and packaging designed by Free The Birds. Their SKIN & BIOTICS supplement exemplifies the potential of multi-purpose formulations in the longevity movement. It combines prebiotics, probiotics, minerals, and vitamins to support hormonal balance, gut health, and skin clarity. By addressing internal health factors, it promotes clearer skin, improved digestion, and enhanced overall wellbeing. Such comprehensive supplements underscore the growing trend towards holistic approaches, targeting multiple health aspects to foster optimal ageing.



Artah

Artah, founded by nutritional therapist Rhian Stephenson, champions longevity with its Longevity Foundations bundle, a trio of multi-purpose supplements designed to optimise cellular health. The Advanced Multi-Nutrient delivers 40 essential vitamins, minerals, and plant extracts to enhance metabolism, energy, and cognitive function. Enhanced NAD+ Complex supports cellular repair and rejuvenation, while Essential Omegas promote heart health, brain function, and emotional wellbeing. By integrating these potent formulations, Artah embodies a holistic, efficacious approach to longevity, making advanced wellness more accessible and effective.

The balance of your body

Habitual, reliable products integrated effortlessly into daily routines, reinforcing wellness through predictable, disciplined care that enhances resilience and vitality over time.

69%

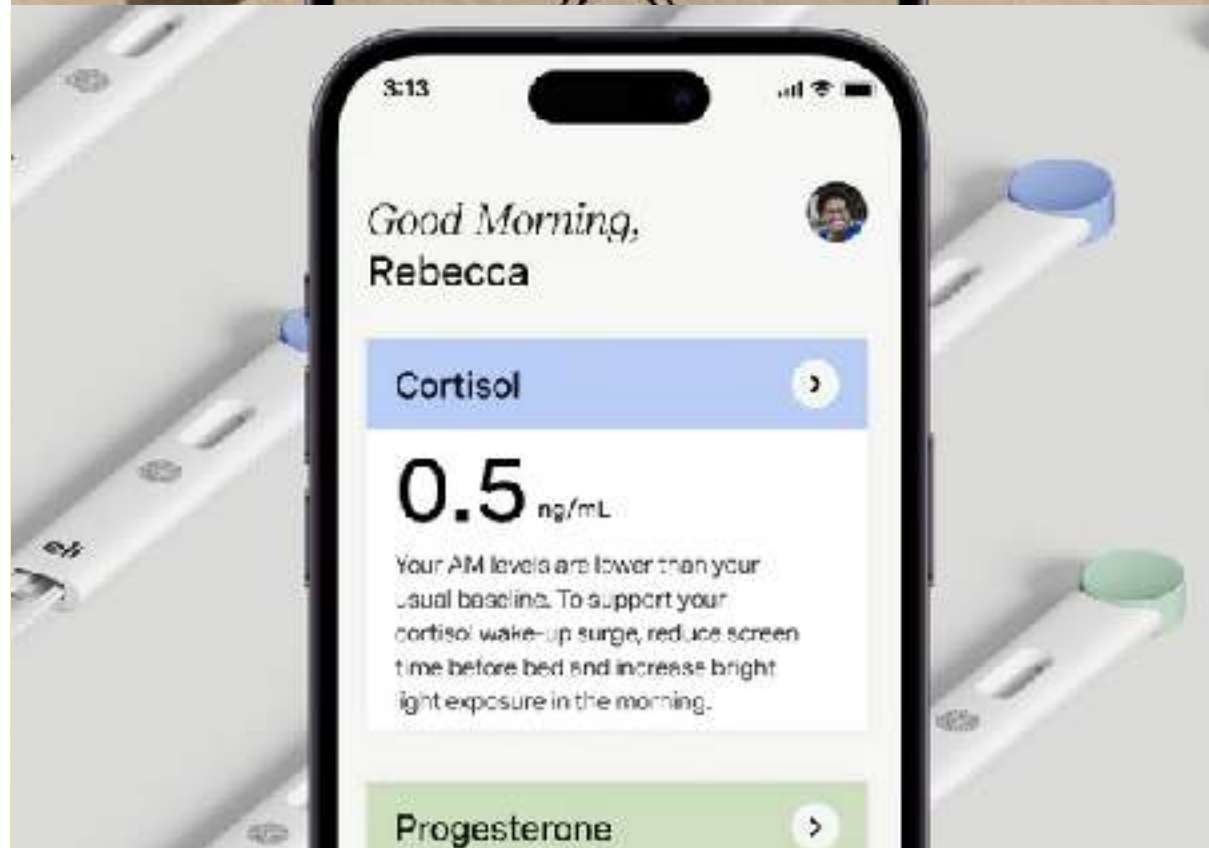
69% of consumers conduct further research online or on social media after encountering health and wellness content.

\$438 bn

The wellness real estate market rose to \$438.2 billion in 2023.

\$14 bn

The global personalised supplements market size was estimated at \$14.02 billion in 2024.



Eli Health

This at-home hormone testing technology provides real-time health insights from saliva samples, allowing users to monitor hormone levels conveniently. By enabling continuous tracking of hormones like cortisol and progesterone, Eli Health empowers individuals to make informed decisions about their wellbeing. Balancing hormones is crucial in the longevity and wellness movement, as hormones regulate various bodily functions, including metabolism, sleep, and mood. Proper hormonal balance can enhance overall health, potentially slowing biological ageing and reducing the risk of age-related diseases.

eyeam

eyeam, a pioneering beauty and wellness brand, integrates crystal healing and affirmations with clinically proven ingredients to promote holistic health. Their Hormone Check Drops are natural, sublingual supplements designed to balance hormones, alleviate PMS symptoms, and reduce inflammation. By supporting the mind, nervous system, and gut-brain-skin axis, these drops highlight the vital role of hormonal balance. Addressing internal health at its core, they enhance overall wellbeing, helping to promote graceful ageing and sustained vitality.



Brands should tap into the **Routine Ritualist** consumer attitude to leverage their preference for consistency and reliability in products. Neighbouring attitudes like the Beauty Harmonist, Tech Voyager and Wellness Trailblazer share values of investment in their long-term healthspan and their physical and mental wellness, unlocking significant marketing potential by appealing to those who prioritise dependable solutions.

How brands can engage with this consumer attitude:

Predictable Sales: Due to their habitual buying patterns, Routine Ritualists provide a stable and predictable source of sales for products they trust and use regularly.

High Customer Retention: These consumers tend to stick with what works for them, which means high retention rates and lower marketing costs for customer re-acquisition.

Brand Loyalty: Once a Routine Ritualist adopts a brand into their daily rituals, they are likely to remain loyal, providing long-term revenue stability.

Advocacy and Word-of-Mouth: If satisfied, a Routine Ritualist may recommend trusted brands to friends and family, extending influence based on deep-rooted trust and satisfaction.

Less Price Sensitivity: Their focus on routine and consistency over experimentation makes them less price-sensitive, allowing brands to maintain stable pricing.

Feedback for Improvement: Their consistent use of products makes them good sources of detailed feedback, which can help brands refine and improve product offerings.

Opportunity for Subscription Services: Brands can benefit from offering subscription services that ensure Routine Ritualists never run out of the products they depend on, enhancing convenience and increasing customer stickiness.

Reduced Marketing Costs: Since these consumers prefer familiar products, brands can spend less on aggressive marketing tactics and instead focus on maintaining quality and trust.

Cross-Selling Stability: Brands that successfully integrate into a Routine Ritualist's life can cross-sell related products that align with existing habits, creating more comprehensive customer engagement.

Strengthened Brand Positioning: By catering to consumers who value tradition and reliability, brands can strengthen their market position as dependable and trustworthy providers.

These attitudes share a focus on practicality, reliability, and long-term value, making them complementary to the Routine Ritualist. Brands can leverage this by promoting products that are dependable, sustainable, and supportive of a consistent, healthy lifestyle.



The Beauty Harmonist

While this group values aesthetics and harmonious design, their focus on style and visual appeal does not typically align with the Routine Ritualist's emphasis on practicality and reliability, when it comes to healthcare the Beauty Harmonist's willingness to invest in efficacious products which are highly personalised to them and their needs, aligns with the Routine Ritualist's desire for the highest quality products which fit their specific needs and routine.



The Tech Voyager

This group is driven by a desire for the latest and most advanced technology, which - in the healthcare sector - helps to bring innovation which revolutionises a routine, supporting greater understanding of our body and its needs. This is perfectly suited to the Routine Ritualist who seeks to maintain and elevate their proven-to-be-effective regimes and enhance their healthspan.



The Wellness Trailblazer

This group prioritises health and wellbeing, often valuing products that contribute to a balanced lifestyle. The Routine Ritualist's focus on established routines can overlap with the Wellness Trailblazer's interest in maintaining consistent, health-oriented habits. Brands can appeal to both by offering health-focused products that fit seamlessly into daily routines.

These attitudes prioritise aspects like innovation, trendiness, and aesthetics, which do not inherently align with the Routine Ritualist's focus on consistency, reliability, and practicality.



The Eco Guardian

In healthcare, a Routine Ritualist often seeks to maintain their regime through a series of products which achieves their desired results, with effectiveness championed over sustainability. This can clash with the Eco Guardian whose primary focus is commitment to environmentally-friendly and ethically-sourced products, and an overall dedication to under-consumption. However, certain Routine Ritualists may align with this ethos if their focus is simplicity in a routine.



The Track & Trend

Followers of this attitude are primarily motivated by the latest trends and mainstream popularity. Their tendency to switch products frequently to stay current contrasts with the Routine Ritualist's preference for stability and long-term use of trusted products. The dynamic nature of Track & Trend consumers is at odds with the Routine Ritualist's consistent purchasing habits.



The Savvy Saver:

Both the Routine Ritualist and Savvy Saver value reliability and practicality. However in this era of healthcare, the Savvy Saver's focus on cost-effectiveness and value for money clashes with the Routine Ritualist's goal of investing in the highest quality, and highly personalised, products which benefit their specific wellness regime and their individual ageing needs.





CONSUMER ATTITUDE

The Track & Trend

This pursuer of the popular diligently tracks and follows the latest trends in both household-name and independent, emerging products, believing that conformity to products which are in-demand is the best course of action.

Trend-following · Fashionable · Conformist · Influenced · Up-to-date
· Mainstream · Popular · Socially-aware · Brand-conscious · Contemporary

This group is highly influenced by friendship groups, social media and the news agenda. They rely less on intense research, more on superficial perceived benefits. Of all consumers, they are the least committed to brands, regularly trying new products they encounter, at the risk of experiencing FOMO.

The Track & Trend's adaptability was fuelled by the global pandemic, which reshaped their spending habits — from where they shopped to the products they chose, often influenced by news and social media. Healthcare is a leading example, as it fuelled the rise of proactive, preventative wellness and greater investment than ever before in personal wellbeing.

There are two key aspects to the Track & Trend consumer in healthcare - those who are quick to explore the hottest, trending products of the moment, and those who use their preferred platforms to learn more about prospective products before trialling them, and/or documenting their experience. Products and markets like the fast-growing sleep supplement space, and those in the GLP-1 phenomenon, are fuelling both of these types of Track & Trend consumers.

They are also the consumers who are most influenced by strong marketing efforts from brands which are adept at capturing the zeitgeist. If a company can nail beautiful branding, deliver entertaining and informative social content, and form well-executed partnerships with trending content creators, they will capture the spending power of the Track & Trend - and health and wellness products are no exception. In fact, they are a major area of potential.

Their commitment to micro-trends results in more frequent — yet less predictable — purchases compared to other consumer groups, experimenting with various ingredients, products and treatments. The Track & Trend's desire to display their habits to the world also ensures that brands can source first person and often in-depth reviews and feedback in real time.

Track & Trend consumers naturally skew towards generations raised on social media, though older consumers who explore online marketplaces and seek digital communities for support are also represented.

“43% of individuals have purchased a health and wellness product or service directly on a social channel – such as through shoppable posts, marketplaces or shared links.”

Healthline, 2023

“The global sleep supplement market is estimated to be valued at USD 7.6 billion in 2024. The market is expected to expand at a CAGR of 5.2% and reach a valuation of USD 12.9 billion by 2034.”

Healthline, 2023

“26% are likely to purchase a recommended product or service after engaging with health and wellness content on social media.”

Healthline, 2023

“Sales of weight management supplements are estimated to total US\$ 5.24 billion in 2024 and further grow at 14.2% CAGR over the next ten years.”

Future Market Insights, 2024

“Analysts estimate sales of obesity medicines to treat diabetes will exceed \$56 billion in 2030, versus \$40 billion estimated previously.”

Morgan Stanley, 2023

Influencing trends

The future is GLP-1

The mainstream mania that is GLP-1 has seen the explosion of medications such as Ozempic become a cemented part of our pop culture. The dramatic shift that accompanies this meteoric rise leads us to question - what comes next? Signs point to two significant routes this revolution will take the market.

We're already seeing a sharp rise in supplements being launched which promise less invasive alternatives to the expensive (and potentially risky) injections, such as patches and gummies. These often come with natural ingredients touted to increase production of the appetite-suppressing GLP-1 hormone, such as Berberine, and even Probiotics with promised effects on appetite. Those which will triumph will be able to demonstrate high levels of efficacy both in formulation and delivery. Consumers may understand that these alternatives will take longer to come into effect than injections, but they will still expect results.

The second wave will be an accelerated growth of supplements which act as a companion to GLP-1 products. These will ensure the effects of accelerated weight loss do not have broader negative effects on the health of the body in the long term.

Aligns with:
Beauty Harmonist



Psychedelics go mainstream

Currently in early stages of research and development, there are a number of treatments showing significant promise in the use of certain psychedelics as a form of treatment for some of the most debilitating mental health illnesses, including PTSD, substance abuse disorders and treatment-resistant depression. These early studies show the promise of drugs such as MDMA, psilocybin and ketamine to manage and treat these illnesses.

As this research continues, we're seeing labs leading these breakthrough studies provide a glimpse into a future of these treatments in closely monitored and heavily regulated settings.

This aligns closely with the rise in holistic wellness that is influencing the longevity movement in healthcare, tapping into ancient practices which communities across the globe have been utilising for centuries. It is likely that the current growing trend of holistic wellness retreats and luxurious wellness centres will incorporate treatments such as these, upon them passing clinical trials and achieving regulated status.

Clashes with:
Savvy Saver



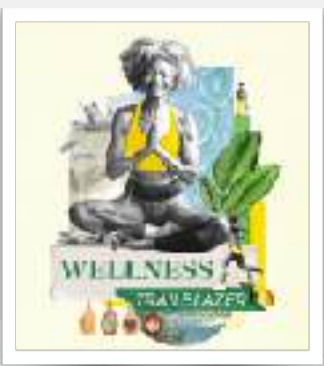
Evolution of the Sleepy Girl

The "sleepy girl mocktail" became a TikTok phenomenon back in 2023, sparking a wave of copycat trends which reportedly helps those struggling to drift off have a better night's sleep. It has undoubtedly supported the expedited growth of magnesium supplements which support healthier and better sleep.

This recognition of the power of sleep is only expected to increase, as research demonstrates its importance for a healthy mind and healthy ageing. As a complex matter affected by so many factors, from diet and exercise to screen time and stress, the sleep movement has become a true lifestyle. It is fuelling a broader range of sleep supplements, which are increasingly viewed as integral components of preventive health strategies aimed at promoting longevity.

It is also tying in with other health phenomena such as non-alcoholic drinks with multiple health benefits, and the wearable technology movement which can track sleep health in minute detail. We expect to see more research revealing breakthrough ingredients and new format deliveries which make it easy for supplements to be incorporated into this wellness lifestyle dominate 2025 and beyond.

Aligns with:
Wellness Trailblazer



The future is GLP-1

As weight management continues to dominate the health zeitgeist, the Track & Trend consumer seeks options which help them to avoid high-priced and high-commitment injectors, instead sourcing supplements that are efficacious, accessible, and highly Instagrammable.

43%

43% of individuals have purchased a health and wellness product or service directly on a social channel.

26%

26% are likely to purchase after engaging with health and wellness content on social media.

5bn

Sales of weight management supplements are estimated to total \$5.24 billion in 2024.



Sugarless

A supplement designed to curb sugar cravings, support weight loss, and stabilise blood sugar levels. Featuring berberine, a natural ingredient that is an alternative to GLP-1 injectors like Ozempic (alongside chromium, L-theanine, and CoQ10), it helps to enhance insulin sensitivity, regulate metabolism, and reduce stress-related eating. Healthy weight management is key to longevity, improving metabolic function and overall wellbeing. By offering an accessible, non-invasive solution for sustained weight control, Sugarless empowers individuals to take charge of their healthspan and long-term vitality.

Lemme GLP-1 Daily™

Lemme, founded by Kourtney Kardashian Barker, offers GLP-1 Daily™ Capsules, a supplement formulated to support appetite regulation and weight management. Featuring clinically-studied ingredients like Eriomin® lemon fruit extract, Supresa® saffron extract, and Morosil™ red orange fruit extract, these capsules aim to enhance the body's natural GLP-1 production, reduce hunger, and promote fat reduction. Leveraging the Kardashian sister's substantial social media presence (224 million followers on Instagram and 7.3 million on TikTok), Lemme has achieved significant virality, effectively engaging a broad audience and amplifying its wellness message.

The future is GLP-1

The well-informed social consumers of today are guaranteed to do their research - and are witnessing the negative impacts rapid weight loss can have on our health, and appearance. As such they source supplements that help to alleviate these issues, and brands are rising to the challenge.

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Elo Health

Elo Health has introduced the GLP-1 Muscle Retention Protein Formula, a doctor-formulated daily protein blend designed to support individuals undergoing GLP-1 treatments. Rapid weight loss from GLP-1 medications can lead to muscle mass reduction, impacting metabolic health and overall wellbeing. Elo's formula combines 24g of high-quality protein (whey or pea), probiotics, fibre, 15 essential vitamins and minerals, and electrolytes to aid muscle retention and digestion. By supporting safe weight management, it aligns with the longevity movement's focus on healthy ageing and ensuring muscle integrity during accelerated weight loss.



Codeage

Codeage's GLP-Harmony Companion+ is a dietary supplement designed to support individuals undergoing GLP-1 agonist (hormone-mimicking drug for weight loss) therapies, by addressing potential side effects. This formulation includes Lion's Mane mushroom extract, known for its cognitive support; palmitoylethanolamide (PEA), which may aid in reducing inflammation; colostrum and shilajit resin extract, traditionally used to enhance immunity and vitality; and Akkermansia muciniphila, a probiotic associated with gut health. By integrating these ingredients, the supplement aims to mitigate issues like nausea and muscle loss linked to GLP-1 treatments.

Evolution of the Sleepy Girl

The mocktail that dominated Tik Tok is taking a back seat to supplements featuring a mix of powerful ingredients proven to be effective at supporting healthier sleep, and natural ingredients which generations of use have shown us can be powerful in aiding a good night's rest.

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26%

26% are likely to purchase after engaging with health and wellness content on social media.

5bn

Sales of weight management supplements are estimated to total \$5.24 billion in 2024.



Oto

This Night Time Complex from Oto is a natural sleep supplement combining nine nootropics and adaptogens with essential vitamins and minerals to enhance sleep quality and duration. Adequate sleep is vital for maintaining cognitive function, emotional well-being, and reducing the risk of chronic diseases, thereby promoting a longer, healthier life.



Lemme

Another big hitter from Kourtney K, these gummies combine 5 mg melatonin to regulate sleep-wake cycles, 50 mg L-Theanine for relaxation, 20 mg magnesium to support nerve function, and a calming blend of chamomile, lavender, and elderberry. These non-habit-forming gummies are vegan, and gelatine-free, through Lemme's commitment to clean supplements.



Evolving Apes

Deep Sleep from Evolving Apes is a cutting-edge nutraceutical designed to optimise sleep cycles and enhance restorative rest. Featuring a blend of GABA, L-Theanine, Magnesium, and 5-HTP, it supports neurotransmitter balance, relaxation, and melatonin production. Deep Sleep aims to reinforce cognitive resilience as part of a proactive approach to ageing well.



Moon Juice

Dream Dust is a blend of adaptogens and herbs formulated to promote restful sleep. Ingredients include Ashwagandha, Jujube Seed, Polygala, Chamomile, and Schisandra, traditionally used to alleviate stress and encourage deep rest. Prioritising sleep supports hormonal balance, cellular repair, and overall the body's ability to function optimally over time.



Brands should tap into the **Track & Trend** consumer attitude to leverage their desire to feature the hottest products for their friends, family and followers. In their pursuit for trending brands, they align with the Beauty Harmonist, Tech Voyager and the Wellness Trailblazer, who seek innovation of the moment.

How brands can engage with this consumer attitude:

Rapid Adoption:

These consumers are quick to adopt the latest products, helping brands gain quick market traction with new launches.

Influence on Market Trends:

Because they follow popular trends, these consumers can help propel a brand into prominence by increasing visibility and desirability.

Social Media Amplification:

Trend-following consumers are likely to share their purchases and experiences on social media, providing brands with free publicity and peer-to-peer endorsement.

Increased Sales Volumes:

By tapping into the desires of consumers who seek the latest and most popular products, brands can see a boost in sales volume during peak trend periods.

Market Research Insights:

Tracking the preferences and feedback of trend-sensitive consumers can provide valuable insights into evolving consumer tastes and market trends.

Brand Rejuvenation:

Engaging with fashionable consumers can refresh a brand's image, making it appear more modern and relevant to a broader audience.

Strategic Partnerships:

Brands can leverage collaborations with influencers and other trendsetters that this consumer group admires, enhancing credibility and reach.

Premium Pricing Opportunities:

During the height of their popularity, products can often command premium pricing, benefiting from increased perceived value.

Competitive Advantage

Staying relevant with trend followers can give brands a competitive edge, particularly in industries where being seen as current is crucial.

Customer Base Expansion

By appealing to trend followers, brands can attract a wider audience, including younger consumers eager to engage with the latest products and services.

These attitudes share a focus on staying current with trends, whether in technology, aesthetics, or wellness, making them complementary to the Track & Trend consumer. Brands can leverage this by promoting products that are stylish, innovative, and aligned with the latest trends.



The Tech Voyager

Both the Track & Trend and Tech Voyager consumers are driven by a desire to stay current with the latest developments. The Tech Voyager focuses on cutting-edge technology, which often becomes trendy. Brands can appeal to both groups by highlighting innovation and the latest features. They also come together with their mutual dedication to building as robust a digital life as their physical life through rich online platforms such as those that exist in the metaverse.



The Beauty Harmonist

This group values aesthetics and current styles, similar to the Track & Trend consumer. They appreciate products that are trendy, have an instagrammable appeal in their use and/or their results, and are beautifully designed. Brands can attract both groups by emphasising fashionable and visually-appealing products and goals. Both archetypes lean into the over-consumption and innovative, viral nature of many health and wellness brands.



The Wellness Trailblazer

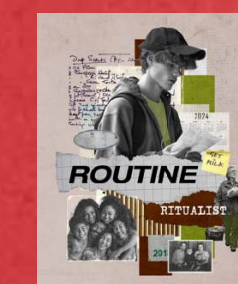
While primarily focused on long term health and wellness goals, this group also keeps up with the latest trends which new research and expertise shows can benefit them - and they are introduced to via social media. Brands offering trend-led wellbeing products for both mental and physical health, can appeal to both Wellness Trailblazer consumers and Track & Trend followers by highlighting modern, popular innovations which lean into the growing longevity movement.

These attitudes prioritise different aspects of consumer behaviour—cost-efficiency, consistency, and sustainability—which are not inherently aligned with the Track & Trend's focus on staying current with popular trends and new products.



The Savvy Saver

This group focuses on economical choices and value for money, often avoiding trendy or new products that can come with a higher price tag. Their primary concern is cost-effectiveness, which contrasts with the Track & Trend's emphasis on following the latest popular products.



The Routine Ritualist

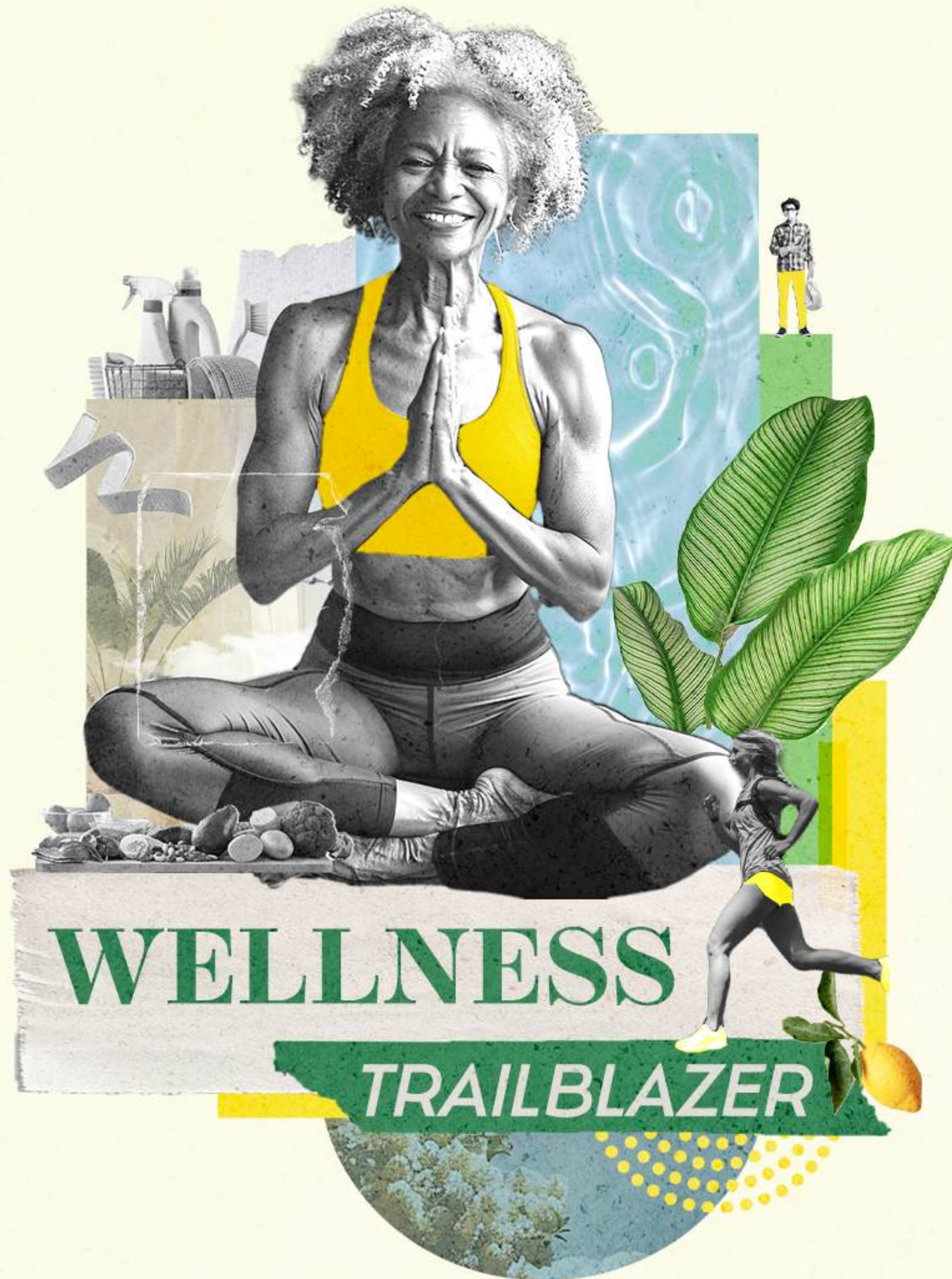
Preferring consistency and familiarity, the Routine Ritualist sticks with trusted and established products, showing little interest in constantly updating to the latest trends. Their focus on stability and routine makes them less aligned with the dynamic and ever-changing nature of the Track & Trend consumer.



The Eco Guardian

While they may occasionally intersect with trends in eco-friendly products, the Eco Guardian's primary focus is on sustainability and environmental impact rather than following the latest mainstream trends. Their commitment to long-term environmental benefits often takes precedence over adopting popular or trendy products.





CONSUMER ATTITUDE

The Wellness Trailblazer

The pinnacle of wellness in their lifestyle, prioritising health and tranquility in every aspect. This includes products they choose for their own and their loved one's personal routines, promoting wellbeing alongside their primary functions.

Health-conscious • Tranquil • Holistic • Mindful • Wellbeing-focused
• Harmonious • Nurturing • Serene • Organic • Balanced

The **Wellness Trailblazer** seeks holistic, sustainable and overall science-based products which provide them comfort in the knowledge that they are safe for them and their loved ones. The products the Wellness Trailblazer chooses for their health and wellness routine play a significant role in both their physical and mental wellbeing.

Because of their passion for protecting their future health and wellness, they are a highly discerning attitude in the ingredients and formulations that they are putting into their body.

The clean ingredients phenomenon is significant here, with Wellness Trailblazers leading the pack when it comes to in-depth research on ingredients which have the potential to cause them or their loved ones long-term harm.

The 'clean' movement is also supported by another significant factor which research shows is becoming even more powerful - clinical effectiveness. The products they choose must do exactly what they claim to be able to do.

This consumer is responsible for the success of efficacious brands in some of the most powerful - and crowded - categories. Sleep and cognitive health, joint health, gut health (to name just a few), the Wellness Trailblazer is pushing brands to not only deliver effectively on their promises in these categories, but also begin to deliver supplements and solutions that are even more targeted in these sectors.

Where brands are demonstrating investment in scientific research and clinical studies which not only prove efficacy but a dedication to delivering on specific needs of consumers.

Believing in the connection between physical health and mental wellbeing, they are drawn to products that enhance this connection. They are the champions of the role of holistic wellness in physical health, believing strongly in the benefits that factors such as social connections and spa-like environments can have.

They also recognise that their choice of products - and the brands behind them - directly impacts the planet's health, and in turn, their own wellbeing as climate change poses growing threats to human health.

“Clean label products are set to dominate portfolios within the next two years making up over 70% – up from 52% in 2021.”
Ingredion, 2024

“99% of European manufacturers see clean label products as essential to their business strategy, with 87% already incorporating these into their products.”
Ingredion, 2024

“54% of consumers claim to know which vitamins to take for their specific health goals.”
Euromonitor International, 2024

“More than 80 percent of consumers in China, the United Kingdom, and the United States consider gut health to be important - and more than half of respondents said it will be a higher priority over the next two to three years.”
McKinsey & Company, 2024

“Roughly half of UK and US consumers reported clinical effectiveness as a top purchasing factor...20 percent said the same for clean ingredients.”
McKinsey & Company, 2024

Influencing trends

A transparent approach

With any health movement or new wave of products promising significant health benefits, there are questions, nerves and uncertainty. Consumer scepticism toward health products is substantial and is expected to continue, influenced by factors such as concerns over chemical ingredients, the impact of direct-to-consumer advertising, and the spread of misinformation on social media.

There is an increasing demand for clean-label supplements, as consumers seek products that promote health and well-being without unnecessary additives. It's reported that 83% of US consumers are knowledgeable about clean-label products - or have heard the term - indicating widespread awareness and interest. It is a trend which reflects a desire for preventive health measures and a holistic approach to wellness.

There are a number of ways brands can rise to the challenge of communicating more transparently with consumers on clean ingredients and formulations, from simple and easy-to-digest ingredients lists and communication of clinical trials and efficacy, to matching transparent formulations with chic, beautifully-executed transparent packaging.

Aligns with:
Beauty Harmonist



Communing in wellness

Last year, a Retirement Living Council in Australia shared research which demonstrated that people living in a retirement village were 41% happier, and 15% more physically active when living as part of a community rather than alone. It was reported that residents in this setting were 20% less likely to require hospitalisation after nine months in residence.

The concept of social self-care emphasises the importance of community in wellness routines. Engaging in group activities, such as communal saunas or group hiking retreats, fosters a sense of belonging and supports mental health.

It is little wonder therefore that we are witnessing a new phenomenon of group-based wellness. Urban areas are witnessing a rise in community saunas that serve as social hubs. These spaces promote inclusivity and genuine connections in a post-pandemic era. Establishments like Altær in Little Compton, RI, and Big Towel Spa in Hudson, NY, have gained popularity by offering intimate, technology-free experiences that emphasise natural settings.

Aligns with:
Savvy Saver



Get with your gut

Probiotics are not a new phenomenon, but in recent years we've seen a sharp rise in the number of products available - across a range of price points, with more strains, diverse formulations, and improved methods of absorption.

Whilst the market is becoming saturated with a number of brands tapping into the trend, its dominance is not expected to slow down. Instead it will expand with advancements in probiotic research which are significantly contributing to the wellness and healthcare sectors, particularly concerning longevity and overall wellbeing. Within this, probiotics are increasingly being formulated to address varied and specific health issues beyond general gut health.

Researchers at Oklahoma State University are currently investigating the effect of certain strains (derived from organic basil) on a form of microorganism where the impact of the strain can be seen on its lifespan, and importantly, healthspan. Here they "observed that incorporating these probiotics into diets can alleviate stress, enhance resistance to diseases, and prolong lifespan." We anticipate that these advanced, specific strains will become increasingly available.

Aligns with:
Routine Ritualist



To be transparent

For the Wellness Trailblazer, transparency is essential, from clean, efficacious ingredients to thoughtfully designed delivery systems and packaging. Sustainability and safety at every level in trusted, holistic wellness solutions that nurture both body and mind.

70%

Clean label products are set to make up over 70% of portfolios — up from 52% in 2021.

50%

Roughly half of UK and US consumers reported clinical effectiveness as a top purchasing factor.

99%

99% of European manufacturers see clean label products as essential to their business strategy.



Ritual

Ritual is dedicated to transparency across every aspect of its products. Prioritising clean, traceable ingredients, it ensures consumers know exactly where each component comes from and why it's included. Their delayed-release capsules enhance nutrient absorption, reflecting a commitment to effective delivery formats. Ritual also champions sustainable packaging, using recycled materials to minimise environmental impact. By combining ingredient integrity, smart formulation, and eco-conscious design, Ritual meets the growing demand for honest, sustainable wellness solutions that align with modern health-conscious lifestyles.



Noon

This cognitive wellness brand merges neuroscience with natural ingredients to support mental clarity, mood, and sleep. Their products feature functional mushrooms, formulated by neuroscientists and clinicians, ensuring efficacy and safety. NOON's commitment to transparency extends beyond clean formulations; they employ innovative dual-layer gummy technology to protect bioactive ingredients and enhance absorption, ensuring consumers receive maximum benefits. NOON emphasises quality and transparency in its product development, aligning with growing consumer demand for trustworthy wellness solutions.

Communing in Wellness

Social connection as a pillar of wellbeing. Modern holistic wellness spaces blend science-backed therapies with community-driven experiences, fostering human connection, emotional resilience, and a nurturing, balanced approach to ageing well.

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Arc

Arc is a wellness hub in London's Canary Wharf, offering communal contrast therapy through sauna sessions and ice baths to enhance both physical resilience and mental wellbeing. By fostering social interaction, Arc creates a supportive, community-driven environment where individuals connect, share experiences, and build meaningful relationships, combatting loneliness, another key factor in ageing well. Regular heat and cold exposure have been linked to improved circulation, reduced inflammation, and enhanced cellular repair. Arc's holistic, social approach reinforces that wellness is not just individual, but a shared experience that supports a higher quality of life.



Remedy Place

Founded by Dr. Jonathan Leary, Remedy Place is the world's first social wellness club, offering a holistic approach to health by integrating self-care with social connection. Members can engage in a variety of treatments, including ice baths, cryotherapy, infrared saunas, IV vitamin drips, and hyperbaric oxygen therapy, all designed to enhance physical and mental well-being. By fostering a community-focused environment, Remedy Place addresses the negative health impacts of isolation and loneliness, promoting human connection as a vital component of wellness.

Get with your gut

The next frontier in gut health and longevity, precision formulations and innovative delivery systems ensure optimal absorption, efficacy, and long-term wellbeing



June Science

June Science offers Active Culture Formulas™, a line of precision probiotics designed to support active lifestyles and long-term health. Their FastMelt probiotics feature clinically studied strains that enhance digestion, nutrient absorption, and immune resilience, with a shelf-stable design ideal for modern, on-the-go wellness. By targeting specific health needs, June Science exemplifies advanced probiotic innovation, reinforcing the crucial role of gut health in longevity. A balanced microbiome supports metabolic function, inflammation control, and cognitive well-being, making gut health a cornerstone of the modern longevity movement.

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99% of European manufacturers see clean label products as essential to their business strategy.



Epetōme

Epetōme's Synbiotic Duo Cap employs innovative Duo Cap® technology, featuring a unique capsule-in-capsule design that enhances the survival rate of beneficial bacteria, making it 30 times more effective than standard capsules. This advanced delivery system ensures that 50 billion live bacteria from 11 clinically trialled strains reach the gut alive, promoting optimal digestive health. By combining prebiotics and probiotics within this dual-chamber capsule, Epetōme effectively supports the gut microbiome, contributing to improved digestion, immune function, and overall well-being.



Brands should tap into the Wellness Trailblazer consumer attitude to meet the rising demand for holistic health products. Aligning with neighbouring attitudes like the Eco Guardian, Beauty Harmonist, and Tech Voyager, which value sustainability, aesthetics, and innovation, unlocks significant marketing potential and attracts wellness-focused consumers.

How brands can engage with this consumer attitude:

Premium Pricing:

These consumers often value quality over cost and are willing to pay more for products that align with their wellness goals.

Brand Loyalty:

Due to their focus on holistic health, once these consumers find a brand that meets their wellness criteria, they are likely to remain loyal.

Market Influence:

As trendsetters in the wellness space, their preferences can shape industry standards and influence the broader market.

Cross-Selling Opportunities:

Since their interest in wellness extends to all aspects of life, there are opportunities for brands to cross-sell across different product categories, from supplements to topical skincare and vitamin patches.

Positive Brand Association:

By aligning with wellness values, brands can enhance their reputation and be viewed as advocates for health and wellbeing.

Building Communities:

Brands which create a platform for these consumers to connect with one another - and the brand itself - have an opportunity to build an authentic, long-lasting connection with them.

Purposeful Collaborations:

Where your brand may not deliver on every aspect or another sector provides access to a group of potential consumers, collaborations with like-minded brands and/or influencers opens doors.

User-generated Content:

As an impassioned group of consumers keen to share their voice, the potential for UGC is high amongst the Wellness Trailblazers, helping to build a bank of authentic content for your brand.

Customer Service Credentials:

Building further on the importance of authenticity, brands which have a robust customer service system have the opportunity to build a very positive reputation with existing and potential customers.

These attitudes all emphasise inner and outer wellbeing, whether through innovative technology, beauty through design, or through kindness to the planet, making them aligned with the Wellness Trailblazer.



Eco Guardian

Both the Wellness Trailblazer and Eco Guardian prioritise health and wellbeing, with a strong emphasis on sustainability and environmental impact. Products that are eco-friendly and promote overall wellness will appeal to both groups, as they value holistic health and sustainable living. Longevity trends which utilise or lean into a connection with nature brings together these like-minded groups.



The Beauty Harmonist

As a group that values beauty and harmony in their routines, seeking beauty and wellness both inside and out, the Beauty Harmonists are natural allies of the Wellness Trailblazer. Brands that emphasise the long-term benefits of both our physical and mental health and wellness and promise a highly efficacious solution can capture the attention of both the Wellness Trailblazer and Beauty Harmonist.



The Tech Voyager

While primarily focused on the latest technology, the Tech Voyager is interested in innovations that enhance their personal health, particularly when it comes to how they are ageing and how they can protect their healthspan. Cutting-edge technologies which identify potential risks to this, as well as promoting practices and products that offer solutions to offset these risks, can attract both Wellness Trailblazer consumers and Tech Voyagers by combining innovation with wellbeing.

These attitudes prioritise different aspects of consumer behaviour—cost-efficiency, trendiness, and routine—which do not inherently align with the Wellness Trailblazer’s focus on holistic health, wellbeing, and balance.



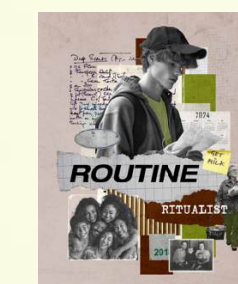
The Savvy Saver

This group prioritises economical choices and value for money, often focusing on cost-effectiveness over products which might cost more due to their delivery systems, formulations or the specialised ingredients contained within them. Their primary concern is reducing spending, which may not align with the Wellness Trailblazer’s championing of premium, health-oriented products.



The Track & Trend

This group follows the latest trends and mainstream popularity, sometimes flitting between products which are of the moment in a quest for keeping up with the masses rather than the primary goal of long-term health and wellbeing. Whilst some of these trends might become mainstays due to their efficacy - after which the Wellness Trailblazer will pay attention - their drivers for purchasing remain different.



The Routine Ritualist

Preferring consistency and familiarity, the Routine Ritualist values stability and established habits. Their reluctance to adopt new products - unless they fit seamlessly into or maximise on their routines - contrasts with the Wellness Trailblazer’s openness to innovative and holistic wellness solutions. However in healthcare these two groups begin to align like never before, as the innovation within the wellness space will see them more willing to fine-tune their routine with advanced products which are naturally championed by the Wellness Trailblazer.



CONSUMER ATTITUDE

The Tech Voyager

On a consistent and committed journey through the realm of technology, the Tech Voyager explores advancements and innovations with dedication and enthusiasm in their everyday life.

Enthusiastic · Dedicated · Tech-savvy · Innovative · Committed · Explorer · Progressive · Inquisitive · Engaged · Forward-thinking

The **Tech Voyager** approaches healthcare and a dedication to longevity with the same curiosity and enthusiasm they apply to other aspects of their tech-driven life. They seek products that offer innovative, high-performance solutions and are eager to explore how technology can enhance their healthspan.

The consumer attitude of early adopters, this group has the financial capabilities and desire to invest in new and potentially game-changing products - even if it means being among the first to try them. This willingness to experiment with emerging technologies sets them apart from more traditional consumers.

They appreciate products that can be tailored to their specific needs, especially when it comes to their health. Technology which can give them the most advanced readings of their physical make-up gives them a highly-detailed understanding of not only their current health status, but also what lies ahead. The modern capabilities of being able to understand how our genetics and epigenetics can present in the future is incredibly valuable to the Tech Voyager.

They seek to simplify their lives, utilising AI to learn their habits and predict their needs. It's for this reason that advancements in wearable technology are being fuelled by this special consumer. They are also responsible for the growing number of individuals who are building as complex a life online as IRL, using platforms like Roblox.

Committed to research and efficacy, the Tech Enthusiast will devour online reviews, understanding the technical aspects of ingredients and formulations, as well as contribution to sustainability which also drives their purchasing decisions.

Their purchasing power is influential through their larger disposable incomes. They therefore include those from older generations with greater spending power, as well as younger, affluent individuals, couples and young families.

“More than three-quarters of respondents [in a 2024 survey] said they would be open to using a wearable device.”

McKinsey & Company, 2024

“If we have genetic information from a healthy 40-year-old, we learn something medically useful in 70 per cent of cases.”

Sir Peter Donnelly, co-founder of Genomics

“Nearly one in five US consumers and one in three US millennials prefer personalised products and services. Some are even willing to part with their biometric data in exchange for personalised recommendations.”

McKinsey & Company, 2024

“ProPhase Labs announced a 211% increase in sales of genomic tests for the first fiscal quarter of 2022, to USD 47.5 million from USD 15.3 million at the end of the March 2021 quarter.”

Grand View Research, 2024

“The global healthcare gamification market size was valued at USD 3.15 billion in 2022 and is expected to expand at a compound annual growth rate (CAGR) of 22.6% over the forecast period from 2023 to 2030.”

Grand View Research, 2022

Influencing trends

Put your genes to the test

As recently as March 2025, the UK regulatory body, MHRA, approved the use of four genetic tests from Oxford-based company Genomics. These tests track type 2 diabetes, breast and prostate cancer and heart disease - conditions reportedly responsible for some of the highest rates of sickness and premature mortality, according to a report on Genomics by The Times newspaper.

This signals the most advanced methods of embracing the preventative mentality much of the globe now seeks in the post-Covid era of healthcare. It aims to provide us with the most accurate picture of not only our current health, but what our genes tell us may lie in our future. The affordability and accessibility of whole-genome and whole-exome sequencing is increasing, and allows us to gain insights into our genetic predispositions and supports the crafting of personalised wellness plans. This helps to enhance disease prevention and secure diagnoses and treatment, all of which contributes to the promotion of longevity and overall wellness.

From luxurious wellness centres with advanced technology woven into its menu of treatments, to at-home testing where your self-gathered samples are sent to advanced laboratories, we're witnessing the future of healthcare testing.

Aligns with:
Routine Ritualist



Wearable tech 2.0

The Tech Voyager has long been ahead of the curve when it comes to wearable technology, having already become religious users of products like the Apple Watch and the Oura ring, to track health on a daily basis.

The next wave of wearable technology - accelerated by the rapid rise of AI - will target an increasing number of specific health needs and risk factors. Emerging research is beginning to spotlight areas of concern that may negatively impact our health as we age.

In response, new tracking and treatment delivery systems will likely emerge, focusing on factors such as light exposure, stress hormones like cortisol, and brain wave patterns.

AI and mobile apps that track and report these factors in real time can offer minute-by-minute feedback, helping users understand how even subtle environmental changes affect their bodies. As we enter a new era shaped by climate change and a deeper awareness of seasonal impacts, this technology can support efforts to protect our long-term healthspan in everyday life.

Clashes with:
Savvy Saver



Gamifying wellness

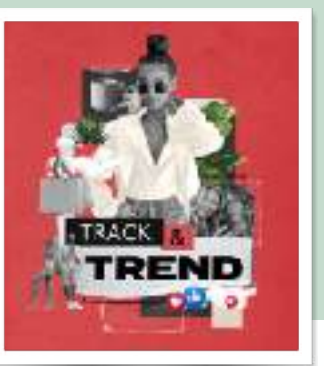
Whilst until recently it may have felt detrimental to our physical and mental wellbeing to spend a great deal of time online - especially gaming - recent and future developments in the digital world are demonstrating the power which can be tapped into through the gamification of wellness.

This is especially significant when we understand the scale of the industry and the influence it holds, not only amongst the youngest (and powerful) Gen Z and A generations, but their family members who wish to monitor and ensure the safety and health of their children on these platforms.

The ability for different generations to connect through these platforms will be a significant tool in protecting our health over years.

The opportunity to connect with like-minded individuals in a highly engaging way, the ability for young minds to gain an understanding of complex emotions, health issues and daily rituals which can benefit them, as well as the opportunity to literally incentivise wellness, all present significant opportunities in this space with seemingly endless growth.

Aligns with:
Track & Trend



Through the looking glass

Cutting-edge innovation is redefining preventative healthcare. High-performance, AI-driven health tracking is driving progressive solutions which are empowering tech-savvy explorers to engage deeply with data-driven, forward-thinking wellness.

75%

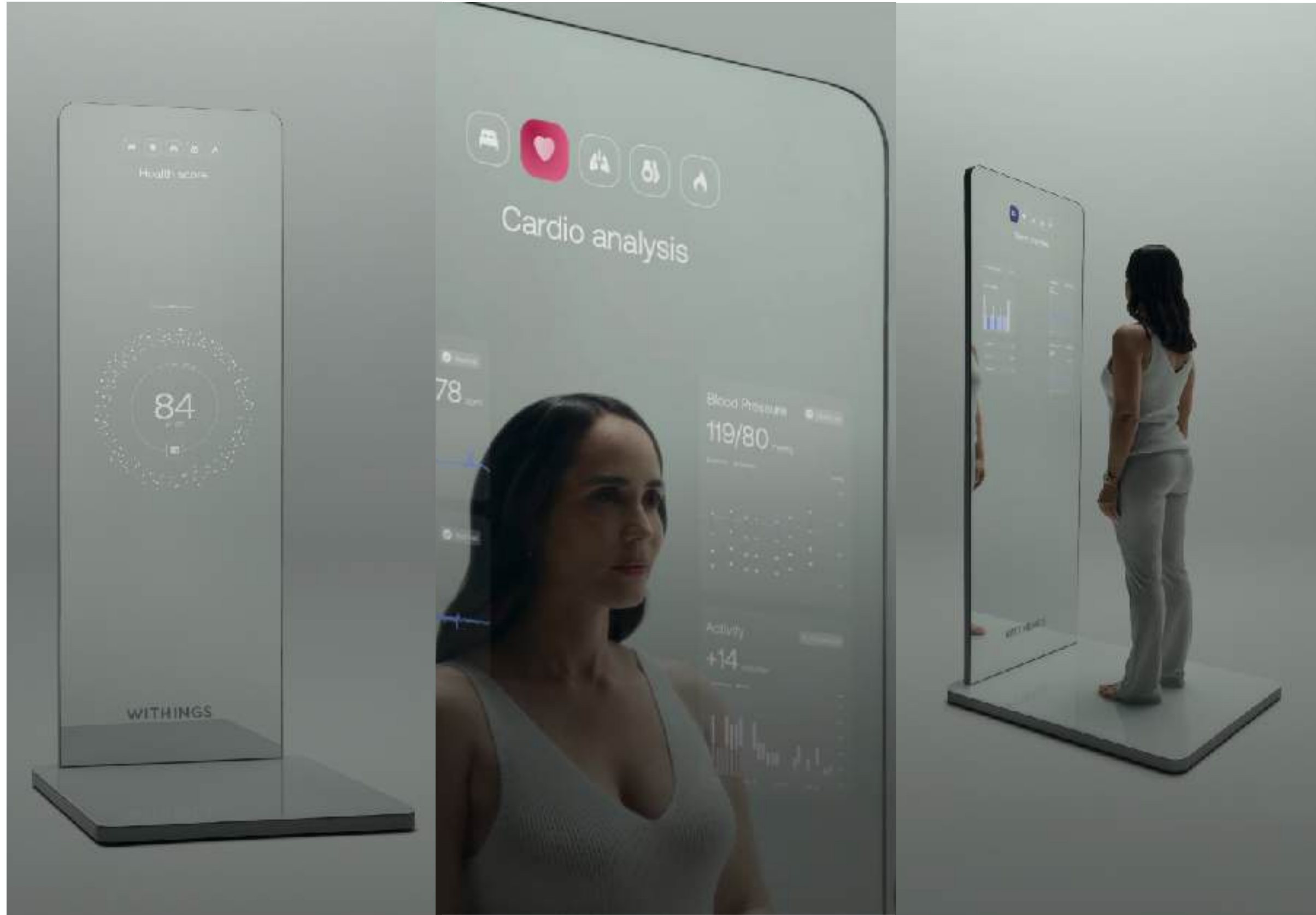
More than three-quarters of respondents said they would be open to using a wearable device.

1 in 5

Nearly 1/5 US consumers prefer personalised products/services, some are willing to part with biometrics in exchange for recommendations.

211%

ProPhase Labs announced a 211% increase in sales of genomic tests for the first fiscal quarter of 2022.



OMNIA

Withings' OMNIA is a cutting-edge health monitoring system that integrates advanced sensors and AI technology, offering a comprehensive, real-time view of vital health indicators. Designed as a sleek, interactive mirror, OMNIA analyses heart health, body composition, sleep quality, and more, providing personalised insights and preventative recommendations. By enabling individuals to proactively track and optimise their well-being, OMNIA represents the future of preventative healthcare, shifting the focus from reactive treatments to empowered, data-driven longevity and health optimisation in everyday life.



Neko Health

Neko Health, co-founded by Spotify's Daniel Ek, offers an advanced body scanning service that represents a significant leap in preventative healthcare. Utilising over 70 sensors, the non-invasive scan captures more than 50 million data points in minutes, assessing moles, heart and arterial health, blood sugar, cholesterol levels, and more. The service includes an immediate consultation with a doctor to discuss results, enabling early detection of potential health issues. By delivering deep health insights with unprecedented accuracy, Neko Health is redefining how individuals monitor, understand, and take control of their wellbeing and ageing.

Wearable tech 2.0

High-performance, neuroscience-driven solutions harness brainwave entrainment and vagus nerve stimulation to optimise cognitive function, stress resilience, and longevity, appealing to inquisitive, forward-thinking explorers of next-gen health innovations.

75%

More than three-quarters of respondents said they would be open to using a wearable device.

1 in 5

Nearly 1 / 5 US consumers prefer personalised products/services, some are willing to part with biometrics in exchange for recommendations.

211%

ProPhase Labs announced a 211% increase in sales of genomic tests for the first fiscal quarter of 2022.



BrainTap

This innovative technology combines light, sound, and guided relaxation to enhance mental and physical wellbeing. Utilising a specialised headset, BrainTap employs brainwave entrainment to synchronise neural activity, promoting deep relaxation and improved cognitive function. Clinical studies have demonstrated its efficacy in increasing heart rate variability, enhancing sleep quality, and reducing stress levels. By empowering users to proactively manage stress, improve focus, and achieve mental clarity, BrainTap exemplifies the future of holistic, technology-driven wellness solutions.



Pulsetto

Pulsetto is an innovative, non-invasive device designed to stimulate the vagus nerve, a crucial component of the parasympathetic nervous system that regulates heart rate, digestion, inflammation, and immune response. By delivering gentle electrical impulses to the neck, Pulsetto activates the 'rest and digest' state, helping to reduce stress, improve sleep, and enhance overall well-being. Vagus nerve stimulation (VNS) has been linked to reduced inflammation, improved mental resilience, and potential benefits for age-related conditions, making Pulsetto a cutting-edge tool in longevity-focused wellness.

Gamifying wellness

Wellness is being revolutionised by immersive digital experiences. Merging mindfulness with interactive technology, these progressive platforms offer engaging, high-performance solutions, transforming self-care into a cutting-edge, tech-driven journey.

75%

More than three-quarters of respondents said they would be open to using a wearable device.

1 in 5

Nearly 1/5 US consumers prefer personalised products/services, some are willing to part with biometrics in exchange for recommendations.

211%

ProPhase Labs announced a 211% increase in sales of genomic tests for the first fiscal quarter of 2022.



Love, Your Mind x Roblox

The Love, Your Mind World on Roblox is a pioneering digital experience, available currently in the US, aimed at supporting teen mental health. This immersive platform offers interactive zones where users can engage in quests designed to teach positive mental health strategies, developed with experts from the Huntsman Mental Health Institute. By integrating wellness education into a familiar gaming environment, this initiative engages younger generations and their families, emphasising mental wellness as a cornerstone of a healthy, extended lifespan. Research indicates that robust mental health is associated with reduced risk of chronic diseases and increased longevity.



Alo Yoga Sanctuary

Alo Yoga's refreshed Sanctuary on Roblox merges mindful movement and meditation with digital engagement, offering a next-gen wellness experience. Users can participate in guided yoga, breathwork, and relaxation exercises, fostering habits that support mental resilience and emotional balance. This activation reflects the rise of experiential wellness, a trend seen in luxury spas and wellness centres, now embraced by a luxury fitness brand in the digital space. By embedding wellness into digital culture, Alo Yoga is reinforcing the longevity movement's emphasis on holistic health in our modern world.



Brands should tap into the Tech Voyager's future-facing purchasing goals, feeding their appetite for products which contribute to the effectiveness and efficiency of their routine. Exploring adjacent attitudes like the Track & Trend and the Beauty Harmonist who share their values, unlocks exciting market potential.

How brands can engage with this consumer attitude:

Early Adoption:

Tech-savvy consumers are likely to be early adopters of new products and innovations, helping brands establish a foothold in the market quickly.

Brand Loyalty:

By consistently meeting the high standards and expectations of these consumers, brands can cultivate loyalty among a demographic known for its enthusiasm and commitment.

Feedback and Innovation:

These consumers are often well-informed and passionate, providing valuable feedback that can drive iterative improvements and innovation in product development.

Influence and Advocacy:

Enthusiastic tech consumers frequently share their experiences and opinions with peers, acting as brand advocates and influencing the buying decisions of others in their network.

Market Trends Insight:

This consumer group is usually at the forefront of technology trends, offering brands early insights into shifting market dynamics and emerging opportunities.

Premium Pricing:

Brands can leverage the willingness of these consumers to invest in the latest technology by introducing products at premium pricing, enhancing profit margins.

Brand Differentiation:

Engaging with forward-thinking and innovative consumers helps position a brand as a leader in technology and innovation, differentiating it from competitors.

Community Building:

This consumer type often participates in forums, social media platforms, and other communities where they discuss their tech experiences, helping brands build and tap into engaged communities.

Sustained Growth:

By aligning with the progressive values and continuous learning attitude of tech enthusiasts, brands can ensure sustained interest and growth in a rapidly evolving market.

Partnership Opportunities:

Brands might find partnership opportunities with other companies that the Tech Voyager admires or follows, expanding their reach and credibility in the tech community.



These attitudes all emphasise modernity and high product standards in technology, design, and trendiness, making them complementary to the Tech Voyager. Brands can leverage this by promoting products that are technologically advanced, stylish, and on-trend, appealing to the Tech Voyager and those influenced by current styles and designs.



The Track & Trend

Both the Tech Voyager and the Track & Trend consumer groups are driven by a desire to stay current with the latest developments and popular products. The Tech Voyager focuses on the newest technology, while the Track & Trend follows broader market trends, including tech products when they are in vogue. Brands can appeal to both groups by emphasising innovation and modernity.



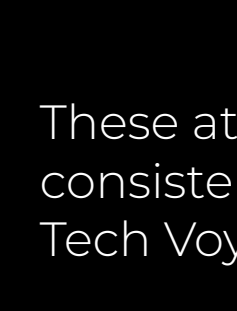
The Beauty Harmonist

This group values aesthetics and design, which can overlap with the Tech Voyager's interest in sleek, well-designed tools and treatments. Brands - as well as spa settings and private wellness clubs - that emphasise the aesthetic and functional design of their technology, can capture the attention of both tech enthusiasts and those who value the healthy appearance of their bodies (achieved through investment in their long-term health), made possible through the use of this technology.



The Wellness Trailblazer

Like the Tech Voyager, this group also appreciates innovative technologies that promote both physical health and inner wellness. Advanced technology which not only protects and nurtures a lifespan but can also provide a sense of holistic wellness in a spa-like experience is very appealing to a Wellness Trailblazer, and sees them align with the Tech Voyager.

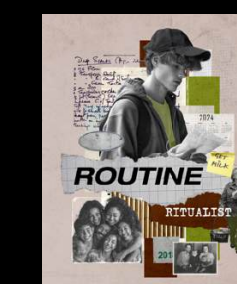


These attitudes prioritise different aspects of consumer behaviour—cost-efficiency, consistency, and environmental impact—none of which inherently align with the Tech Voyager's drive for innovation and the latest technology.



The Savvy Saver

This group prioritises economical choices and getting the best value for their money. They carefully consider their purchases, often opting for budget-friendly options and deals that offer long-term savings. Savvy Savers typically avoid the latest and potentially more expensive technologies that the Tech Voyager seeks, preferring reliable and cost-effective solutions. Their purchasing decisions are driven by practicality and financial prudence, aiming to minimise unnecessary spending while maximising utility and savings.



The Routine Ritualist

Valuing consistency and familiarity, this group sticks with trusted products and established habits. They are less inclined to adopt new technologies quickly, preferring items that fit seamlessly into their routines. However, whilst the Routine Ritualist does prioritise reliability, ease of use, and the comfort of familiar products, they also can embrace new technology which enhances the effectiveness of their routine through advanced insights into their health. Here they do align with the Tech Voyager.



The Eco Guardian

While there can be overlaps with eco-friendly technologies, the primary focus of the Eco Guardian is sustainability and reducing environmental impact, which may not always align with the Tech Voyager's pursuit of the newest tech products regardless of their environmental footprint.



CONSUMER ATTITUDE

The Savvy Saver

Driven by a necessary desire to reduce unnecessary spending, the Savvy Saver's purchasing decisions are based upon value for money, from the cheapest option available to capitalising on deals of the moment, or strategic purchases which save them money over time.

Value-conscious • Frugal • Discount-driven • Brand-flexible • Deal hunters • Resourceful • Practical • Strategic • Economical

During this difficult period of tightened purse strings for many, the **Savvy Saver** and their attitude to spending is strategic and practical in their approach to purchasing. They focus on finding the best value for money and making informed decisions to reduce spending while still maintaining their important routines.

The Savvy Saver is the group most driven by the cost of living crisis, which has significantly affected their disposable income. They therefore seek products which meet basic quality demands in their care regime, without compromising on essential quality.

Because of this (often severe) financial pressure these consumers face, they are one of the attitudes who deal with stress on a daily basis. With the prevalence of online discussions on this health topic and therefore heightened awareness of its effects, areas of health such as this will be prioritised within the budget available to a Savvy Saver.

Because of this, they are also the drivers of social-driven (and mostly free or low cost) solutions for improving their physical and mental wellness - cue outdoor activities and community wellness.

They feel little allegiance to individual brands; their loyalty lies more with retailers who can offer them deals on brands, or whose own-brand products are competitively-priced. Retailers will also gain allegiance from the Savvy Saver through loyalty schemes and bulk-buying deals, which reduce the per unit cost and allows them to save money over time whilst taking advantage of higher quality products.

Due to the broad impact of the cost of living crisis, this multi-generational group spans younger generations funding their day-to-day life independently for the first time, through to older generations who will likely be supporting younger members of their family.

Their savviness also lies in their ability to DIY. They tap into trends they find online, traditional ingredients they can use to craft health solutions at home, or multi-use products which can replace specialised items, to further cut down on costs.

Over the past year, there has been a 30% increase in private label spending, as 27% of shoppers point to this switch as “an essential part of their cost-saving strategy in 2024.”

NielsenIQ, 2024

“Most notable in the USA, but also true of other markets, is an increasing preference for online purchase of supplements; many US consumers use subscribe & save offers and holiday sales periods to load up on supplements.”

Nicholas Hall, 2025

A significant percentage of consumers use devices or apps to track their fitness and health. Millennials and Gen Z show the highest adoption rates, indicating a desire to establish strong wellbeing foundations early on.

Euromonitor International, 2024

72% of consumers report moderate to severe impact from stress.

Euromonitor International, 2024

“In 2024, 72% of consumers were concerned about the rising cost of everyday items, and 48% planned to save more money.”

Euromonitor International, 2024

Influencing trends

Democratising longevity

The landscape for at-home health testing was completely transformed during the Covid-19 pandemic. The ability to test yourself daily to protect your health and others was unprecedented in the number of individuals it reached globally.

We've entered a new era of empowerment, where consumers can diagnose themselves within the preventative healthcare movement we now live in. The market for DTC health tests has seen substantial growth, driven by a desire to proactively monitor our health. These provide insights into various health metrics, enabling individuals to make informed decisions about their wellness.

The caution with this rapid growth is the origin of these tests. Consumers must also be equipped with the tools and knowledge to understand the credentials of the health professionals behind them, as well as resources to help them put results into action. The other major shift is in the democratisation of online resources, allowing individuals to research symptoms and conditions, fostering a more proactive approach to health, without causing unnecessary anxiety or misinterpretation of results without proper context.

Aligns with:
Routine Ritualist



Coping with cortisol

The marriage between cognitive enhancement and life extension is a close one. The understanding of the effect that stress and cortisol levels have on our body is better than ever before.

And whilst the concept of 'Cortisol Face' which dominated TikTok for a period in 2024 has been generally debunked, the impact an excess of cortisol can have on our body and mind should not be overlooked.

Although global stress levels eased for the first time since 2014 (as reported by Gallup in 2024), they are still notably higher than a decade ago. We therefore believe the investment in the stress supplement space will show no sign of slowing. Instead, we'll see a new wave of products featuring breakthrough ingredients with proven effects on brain function, mood, and cortisol levels. These include GABA (Gamma-Aminobutyric Acid) and Lions Mane mushrooms, which are becoming more widely available and at accessible price points. They join omega-3 and magnesium, which are already widely available, offering stress support to customers with lower disposable incomes.

Aligns with:
Wellness Trailblazer



Thermal wellness

A practice with deep historical roots, understanding of the benefits of thermal wellness and the combination of hot and cold practices goes back millennia. Its resurgence has been kickstarted by the recent trend of ice baths, touted for their healing effects.

Where it is currently evolving (and is set to dominate 2025) is in combination with hot experiences such as saunas. Their fast growing popularity is evident in their accessibility. It is no longer essential for you to have an expensive spa day to access the benefits of these experiences - they are being introduced at community level.

Not only does this practice invite a mental escape from digital addiction and the pressures of daily life, the physical benefits are staggering. Research has reportedly shown that those who use a sauna 4 - 7 times a week were at a lower risk of developing Alzheimers by 65%. The same research showed a 50% reduction in cardio-vascular-related deaths. Meanwhile voluntary exposure to cold water has shown potential benefits, including decreased stress, possible 'neuroprotective' effects as well as aiding the reduction of insulin resistance and improving metabolic health.

Clashes with:
Tech Voyager



Democratising longevity

Where at-home and wearable technology remains costly, free (yet efficacious) wellness apps provide cost-effective solutions that enable informed choices, habit-building, and long-term savings, making wellness accessible.

48%

72% of consumers are concerned about the rising cost of everyday items. 48% plan to save more money.

30%

There's been a 30% increase in private label spending, as 27% of shoppers point to this switch as an essential part of their cost-saving strategy.

72%

72% of consumers report moderate to severe impact from stress.



Yuka

Yuka is a mobile app that allows users to scan food and cosmetic products, offering free, research-backed insights into their health impact. By analysing ingredients, Yuka helps consumers make informed choices for better nutrition, safer skincare, and long-term well-being - without requiring a high disposable income. This accessible, proactive approach aligns with the longevity movement, enabling individuals to extend their healthspan through conscious consumption. As an independent, unbiased platform, Yuka empowers users to adopt healthier habits, ensuring everyone can invest in products that genuinely support sustained vitality and preventative health.



Noom Vibe

This free wellness app is designed to promote healthy habits and an active lifestyle with no in-app purchases or membership required. It blends incentivisation with self-empowerment, fostering lasting healthy habits which are "critical to whole-person health and longevity", while building a supportive community through connections with experts as well as friends. It "harnesses the power of psychology" by rewarding users with "Vibes", its virtual currency, earned through positive lifestyle choices. These Vibes can be redeemed for gift cards or donated to meaningful causes, turning wellness into a rewarding, purpose-driven experience.

Coping with cortisol

For those navigating the cost of living crisis, managing daily stress and mental wellness is essential. Affordable, science-backed supplements that help reduce cortisol, enhance focus, and support resilience are important in a Savvy Saver's quest for longevity.

48%

72% of consumers are concerned about the rising cost of everyday items. 48% plan to save more money.

30%

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72%

72% of consumers report moderate to severe impact from stress.



Beekeeper's Naturals

Founded by Carly Stein, Beekeeper's Naturals, is dedicated to creating clean, science-backed wellness products using sustainably sourced bee-derived ingredients. Their Brain Nootropic offers an affordable, natural alternative to luxury brain-boosting supplements, combining royal jelly, rich in acetylcholine and 10-HDA, with adaptogens bacopa monnieri and ginkgo biloba to enhance cognitive function, memory, and focus, without caffeine. Committed to bee conservation and environmental responsibility, Beekeeper's Naturals delivers effective, accessible brain health support, ensuring high-performance, plant-powered wellness without the premium price tag.

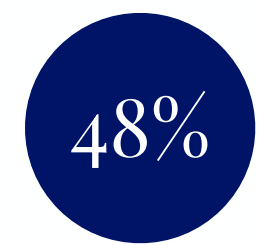


Youth & Earth

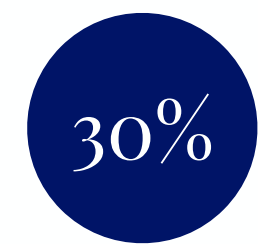
This UK-based brand is dedicated to longevity and anti-ageing, offering cutting-edge, plant-based supplements designed to support cellular health and vitality (at a very manageable cost when compared with competitors). Their Chillaxcine formula blends Shoden® Ashwagandha, L-theanine, and Affron® Saffron extract to reduce cortisol levels, the stress hormone linked to inflammation, metabolic imbalance, and accelerated ageing. By promoting relaxation, improved sleep, and mood stability, it helps counteract the effects of chronic stress, a key factor in longevity. This high-quality formulation empowers individuals to maintain resilience and well-being as they age.

Thermal wellness

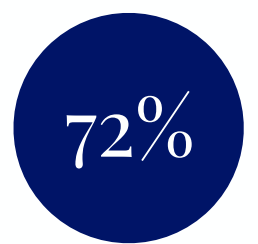
The rise of therapies combining heat and cold that are low cost but high impact offers all the long-term benefits of these traditional methods, while reducing reliance on expensive treatments and adding a sense of community spirit.



72% of consumers are concerned about the rising cost of everyday items. 48% plan to save more money.



There's been a 30% increase in private label spending, as 27% of shoppers point to this switch as an essential part of their cost-saving strategy.



72% of consumers report moderate to severe impact from stress.



Sawna Dyfi

Sawna Dyfi is pioneering the new wave of thermal wellness, bringing accessible sauna and cold immersion experiences to the community level. With a wood-fired sauna and scenic plunge pool, it offers a powerful combination of heat and cold exposure. Thermal wellness is linked to enhanced circulation, reduced inflammation, cardiovascular health, and cognitive resilience, with research suggesting benefits in reducing Alzheimer's risk and improving metabolic function. By integrating social connection and restorative wellness, Sawna Dyfi transforms heat and cold therapy into a communal, mindful and healthy ritual.



The Outdoor Swimming Society

This special society fosters a thriving community spirit, dedicated to the benefits of cold water swimming. Regular immersion has been shown to boost the immune system, enhance circulation, and elevate mood, promoting both physical resilience and mental wellbeing. Engaging in social fitness activities like outdoor swimming not only strengthens cardiovascular health but also fosters deep community connections, reducing stress and potentially extending lifespan. Through events, resources, and a supportive network, OSS encourages individuals to embrace the transformative power of cold water for long-term health and vitality.



Brands should tap into the Savvy Saver consumer attitude to leverage their cost-conscious purchasing habits and explore adjacent attitudes like the Routine Ritualist and the Eco Guardian, which also value economical and sustainable choices, unlocking substantial marketing potential.

How brands can engage with this consumer attitude:

Volume Sales:

Savvy Savers are often drawn to promotions and bulk buying opportunities, which can boost sales volumes during discount and clearance events.

Customer Loyalty:

By consistently offering value for money, brands can build loyalty among consumers who prioritise cost-effectiveness over brand loyalty.

Brand Advocacy:

Savvy Savers tend to share good deals with their network, acting as brand advocates when they find exceptional value.

Market Penetration:

Lower-priced or value-oriented products can help brands penetrate markets where price sensitivity is a key consumer trait.

Feedback for Cost Efficiency:

These consumers can provide valuable feedback on pricing and product features, helping brands streamline offerings to maximise value.

Enhanced Brand Image:

A reputation for delivering value can enhance a brand's image, positioning it as a customer-centric and economically aware choice.

Increased Traffic:

Regular promotions and discounts attract more footfall or online visits, creating opportunities to sell additional products.

Data Collection:

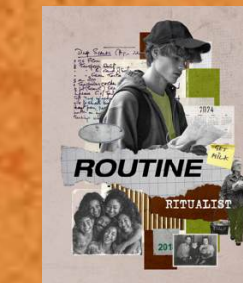
Promotions and deals that require sign-ups provide valuable data for future marketing strategies and customer behaviour analysis.

Cross-Selling Opportunities:

By engaging customers looking for value, brands can introduce them to other cost-effective products in the lineup.

Long-Term Customer Engagement:

By aligning with the financial goals of Savvy Savers, brands can maintain long-term relationships with a broad base of cost-conscious consumers.



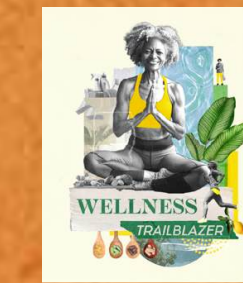
The Routine Ritualist:

This group and the Savvy Saver both prioritise reliable and practical solutions. The Routine Ritualist's focus on consistency and trust in familiar products complements the Savvy Saver's emphasis on value and economical spending. Brands that provide dependable products at a reasonable price can appeal to both attitudes, offering longevity and cost-effectiveness.



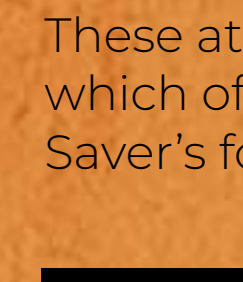
The Eco Guardian:

While their primary focus is on sustainability, the overlap with the Savvy Saver comes from the shared interest in long-term cost savings through sustainable choices. Eco-friendly products often reduce energy consumption and waste, which aligns with the Savvy Saver's goal to economise. Brands can market environmentally-friendly products not just as ethical choices but also as economically beneficial in the long run. Similarly, high value practices which involve simply getting outdoors or into nature as part of a healthcare regime, brings these two groups together.



The Wellness Trailblazer:

The link here is the emphasis on long-term value and health benefits. Savvy Savers look for products that are cost-effective over time, similar to how Wellness Trailblazer consumers choose products that promise lasting health benefits. Brands that highlight both the financial and health advantages of their products can capture the interest of both consumer types.



The Tech Voyager:

This consumer group's focus on the latest and most advanced technology often means they prioritise innovation and novelty over cost-effectiveness, which can lead to higher spending rather than saving. Their eagerness for the newest tech gadgets may not align with the Savvy Saver's goal of reducing unnecessary expenses.



The Track & Trend:

Followers of the latest trends and mainstream popularity, this group often purchases items based on current fashion rather than long-term value or utility. Their frequent shifts to stay in line with what's popular can lead to higher consumption and less focus on saving money, which contrasts with the Savvy Saver's emphasis on economical and strategic purchases.



The Beauty Harmonist:

Although this group does consider aesthetic quality in their purchases, they often prioritise design and beauty over cost, which may lead them to choose more expensive products simply for their visual appeal. This tendency for higher spending on premium, design-focused items does not generally align with the Savvy Saver's more budget-conscious approach.



CONSUMER ATTITUDE

The Eco Guardian

Dedicated to protecting and preserving the environment, the Eco Guardian actively seeks to safeguard our planet through a commitment to sustainability in daily choices and consumption habits.

Environmentally-conscious · Sustainable · Eco-friendly · Green · Responsible · Ethical · Protective · Resource-conserving · Organic · Earth-minded

The **Eco Guardian** lives by a high standard of green practices and purchasing habits. And they expect the companies they buy from to be exercising these same practices as standard, to meet their forward-thinking demands.

When it comes to vitamins, supplements and health and wellness practices that contribute to a healthier ageing process, their dedication to sustainability presents strongly in their choice of ingredients. They feel a deep connection to natural ingredients, sourced sustainably (including being kind to animals if they are animal-based ingredients) and formulated in a way that is less harmful to the environment. They often champion ingredients rooted in tradition and holistic philosophies.

Their desire to nurture and connect with nature sees them explore methods such as sound baths and forest bathing, renowned for their physical and mental wellness benefits.

Champions of the conscious consumption movement, the Eco Guardian will avoid needless additions to their care regime, seeking instead multi-functional products which help them to reduce their waste contribution. However, brands will certainly be capable of enticing new Eco Guardian customers through a commitment to packaging which is minimal, reusable, or refillable.

With this should also come clear, honest, authentic marketing. The Eco Guardian is committed to researching the products they're purchasing, and expect brands to be a communicative and upfront in launching their products to the world. It is for this reason that smaller and local independent brands appeal to the Eco Guardian, eco-conscious in their smaller batch productions which reduce their carbon footprint.

Eco Guardians span multiple generations, from Gen X and Baby Boomers who recognise their purchasing power, to younger Gen Zs who expect companies to prioritise sustainability as standard - and know their power in moving the market leadership dial.

“The global natural health supplement market is projected to expand from an estimated \$58.27 billion in 2024 to \$121.76 billion by 2034.”

Fact.MR, 2024

“Twenty percent look for sustainable packaging, 25% look for sustainable ingredients and 38% search for formulas that are clean/free of harmful chemicals.”

GCI Magazine, 2022

In the US, consumers are actively seeking organic and “clean” brands. Marketers are also targeting consumers who are looking for vegan, sugar- and additive-free options, and highlighting “clean” credentials.

Nicholas Hall, 2025

The global functional mushroom market is projected to reach from USD 38.88 billion in 2025 to USD 76.35 billion by 2033.

*Straits Research
2025*

The global colostrum market size grew to USD 3.87 billion in 2025 and is projected to reach around USD 7.34 billion by 2034.

*Precedence Research,
2024*

Influencing trends

The magic of mushrooms

Long regarded as health powerhouses, mushrooms are celebrated for their support across multiple dimensions of our healthspan

Now available in a seemingly endless number of formats, be it gummies, capsules or coffees, the growth of this sector - which is set to continue at pace - will hone in on advanced benefits of certain forms of mushroom which contribute to ageing well.

Lion's Mane is a current favourite - a centuries-old practice in traditional Chinese medicine, it helps to support mental clarity, focus, with additional interest in its potential for combating cognitive decline associated with ageing. It's reported that Buddhist monks used this magical ingredient to enhance their focus during long meditation sessions.

A major ingredient ahead, we believe, will be Ergothioneine, a powerful antioxidant found in mushrooms which supports brain health, reduces oxidative stress, and combats inflammation. It has shown promise in protecting against neurodegenerative diseases, improving mitochondrial function, and enhancing cellular longevity, contributing to healthy ageing.

Aligns with:
Beauty Harmonist



Liquid Gold

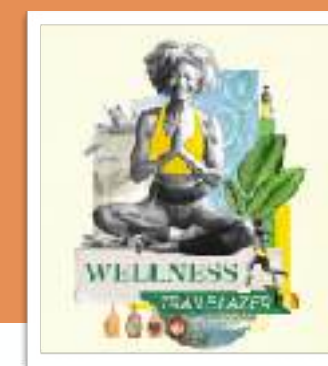
Whilst still at early stages of the research into its benefits, bovine colostrum is already proving itself to be a major player in wellness and longevity supplements thanks to it being rich in antibodies, growth factors, and nutrients that support immune function, gut health, a reduction in inflammation, and overall wellness.

Dubbed liquid gold, colostrum is what mammals produce in the first 48 - 72 hours after giving birth, and is acknowledged to be the first dose of essential nutrients provided to newborns to give them what they need most.

The wider understanding of what this natural ingredient is capable of beyond our earliest days and months of life, is expected to take off in 2025. It is paving the way for more products featuring this ingredient and in different delivery formats. We've already seen it expand into protein powders and even Erewhon smoothies thanks to Sofia Richie Grainge.

It is also highly appealing to those who wish to move away from chemical ingredients and instead champion the super abilities of nature's most nutrient-rich offerings.

Aligns with:
Wellness Trailblazer



Aura points

In 2025, 'aura points' are known as a tongue in cheek reference to falling victim to an embarrassing, cringey situation. However the viral popularity of this micro trend has taken nothing away from the powerful concept that is cleansing your aura and nurturing your inner, mental wellbeing.

The growing dominance of holistic practices in health and wellness makes exercises and instruments which can clear negative energies and mindsets from our lives incredibly valuable for the Eco Guardian, who value their connection with nature more highly than any other attitude.

Over centuries certain practices have been established, rediscovered and celebrated as they gain international recognition. From the ancient civilisations of Egypt, Vietnam and Tibet came the ritual of sound baths, utilising the vibrations and sound waves of singing bowls in spiritual ceremonies which demonstrated physical effects on the body. Meanwhile, the Japanese practice of Shinrin-yoku, or forest bathing, began as a traditional method of mindful immersion in nature, and has since evolved into a modern wellness phenomenon, praised for its ability to reduce stress, elevate mood, and support overall wellbeing through a sensory connection with the natural world.

Clashes with:
Tech Voyager



Magic of mushrooms

Mushrooms are gaining recognition as a powerful, sustainable ally in longevity. Offering natural support for cognition, immunity, and stress, they promote wellness with minimal environmental impact, aligning seamlessly with an eco-conscious lifestyle.

\$121
bn

The global natural health supplement market is projected to expand to \$121.76 billion by 2034.

25%

20% look for sustainable packaging, 25% look for sustainable ingredients.

\$76
bn

The global functional mushroom market is projected to reach \$76.35 billion by 2033.



Feel Mushroom Complex

Feel, the wellness brand committed to providing clean, science-led, and sustainable supplements, offers an Ashwagandha + Mushroom Complex which combines patented KSM-66® Ashwagandha and Affron® Saffron with functional mushrooms like Lion's Mane, Reishi, and Cordyceps. This blend aims to support mental performance, memory, cognition, and relaxation.



DIRTEA Super Blends

DIRTEA, founded by brothers Andrew and Simon Salter, blends functional mushrooms with everyday beverages to enhance well-being. Their Super Blends range infuses coffee, matcha, cacao, and chai with Lion's Mane, Reishi, Chaga, and Tremella, supporting energy, focus, immunity, and relaxation through modern, functional nutrition.



Alice Mushrooms

Alice Mushrooms offers functional mushroom-infused chocolates, blending Lion's Mane, Cordyceps, guarana, and phosphatidylserine to support mental clarity, energy, and focus. By combining science-backed nootropics with indulgence, Alice elevates mushrooms as a versatile, transformative ingredient in the evolving landscape of cognitive and holistic health.



Ooma

Ooma pioneers a next-generation supplement combining P. cubensis, Sargol saffron, Lion's mane, Reishi, and Ashwagandha to support mood, cognitive function, and overall wellbeing. By harnessing the potential of P. cubensis alongside adaptogens and nootropics, Ooma positions this hero ingredient as a groundbreaking force in holistic health and longevity.

Liquid Gold

Colostrum is emerging as a supplement which offers immune support and gut health benefits while aligning with eco-friendly, regenerative practices – the key will be ethically-sourcing this valuable hero ingredient.

\$121
bn

The global natural health supplement market is projected to expand to \$121.76 billion by 2034.

25%

20% look for sustainable packaging, 25% look for sustainable ingredients.

\$7bn

The global colostrum market size is projected to reach around \$7.34 billion by 2034.



Armra

ARMRA is a pioneering brand in the consumer colostrum category, dedicated to enhancing health by strengthening the body's natural defences. Their flagship product, ARMRA Colostrum™, harnesses over 400 bioactive nutrients, including peptides, antibodies, and antioxidants, to support immunity, gut health, and metabolic function. Using proprietary Cold-Chain BioPotent™ Technology, ARMRA preserves these nutrients in their most potent form, ensuring maximum efficacy. As a hero ingredient with vast potential, colostrum is emerging as a research-driven innovation for those seeking to optimise everyday performance and long-term vitality.

Ballerina Farm

Ballerina Farm, founded by former ballet dancer and social media figure Hannah Neeleman, is a Utah-based brand now known for its farm-fresh products. Their Farmer Protein Powder is made from 100% grass-fed whey protein, collagen, hemp protein, and bovine colostrum, all sourced directly and ethically from cows raised on their own farm. This carefully crafted blend supports muscle development, joint health, and immune resilience, offering a wholesome, nutrient-dense option. Available in Creamy Chocolate, Vanilla Bean, and Maple Cinnamon, it combines high-quality sourcing with indulgent flavour.

Aura points

Ancient practices like sound therapy and forest bathing have reemerged as beautifully accessible ways to enhance wellbeing and reconnect with nature. Thoughtfully designed tools and spaces now help us harness these timeless traditions for modern health and harmony.

\$121
bn

The global natural health supplement market is projected to expand to \$121.76 billion by 2034.

25%

20% look for sustainable packaging, 25% look for sustainable ingredients.

\$76
bn

The global functional mushroom market is projected to reach \$76.35 billion by 2033.



Hess Sound

Peter Hess® Therapy Singing Bowls integrate Eastern sound healing traditions with Western therapeutic practices. Housed in packaging designed by Free The Birds, they are meticulously handcrafted to produce harmonious vibrations that resonate deeply within the body, promoting relaxation and wellbeing. Sound therapy has been associated with reduced stress levels, lower blood pressure, and enhanced immune function, all of which can contribute to a healthier lifespan. By aligning the body's vibrational frequencies, this practice may release energetic blockages, restore balance, and facilitate a sense of inner harmony, supporting both physical and emotional health.



Design for forest bathing

The practice of forest bathing has become a truly global phenomenon, and it is exciting to see how forestry bodies have created beautifully-designed additions to national parks which allow members of the public to take advantage of this holistic practice. The UK National Trust has installed benches designed by park rangers in Basildon Park, Perthshire, whilst benches at Minnowburn have been designed using oak wood, and funded by Tourism Northern Ireland. These are a beautiful example of how design can work with nature to help us maximise on what nature has to offer, without taking anything away from these beautiful, pristine and unaltered settings.



Brands should be conscious of the highly knowledgeable and driven consumer that is the Eco Guardian, delivering transparency and authenticity. This powerful group aligns naturally with those who recognise the importance of wellness.

How brands can engage with this consumer attitude:

Brand Loyalty:

Eco Guardians are loyal to brands that share their commitment to sustainability and environmental protection, creating long-term customer relationships.

Premium Pricing:

Consumers dedicated to environmental causes are often willing to pay a premium for products that are sustainably sourced and manufactured.

Market Differentiation:

Brands that successfully communicate their environmental initiatives can distinguish themselves from competitors, attracting a dedicated consumer base.

Enhanced Brand Reputation:

Being aligned with environmental values can significantly improve a brand's image and appeal, as consumers increasingly seek out companies with strong corporate social responsibility.

Access to Niche Markets:

Sustainable products often cater to niche markets that are underserved, providing brands with an opportunity to lead in specialised categories.

Regulatory Compliance:

Aligning with sustainability helps brands stay ahead of increasingly strict environmental regulations and avoid potential fines or sanctions.

Innovation Drive:

The demand for eco-friendly products encourages innovation in product development, materials, and production processes, leading to overall business improvement.

Customer Advocacy:

Eco Guardians are likely to advocate for brands they believe in, using their personal platforms to influence others and expand the brand's reach.

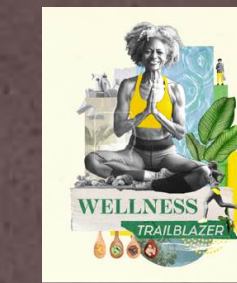
Reduced Operational Costs:

By adopting more sustainable practices, brands can also reduce waste and energy costs, leading to better efficiency and profitability.

Stronger Stakeholder Relationships:

Companies that prioritise sustainability often build stronger relationships with not just consumers but also employees, investors, and regulators, who value environmental stewardship.

Each of these attitudes shares some core values with the Eco Guardian, such as a focus on sustainability, health, cost-effectiveness, and aesthetic quality in their products. By understanding these overlaps, brands can more effectively tailor their marketing strategies to appeal to eco-conscious consumers, while also meeting the specific needs and preferences of these related attitudes.



The Wellness Trailblazer:

This consumer group values health and tranquility, often preferring natural, organic, and eco-friendly products that support holistic wellness. Their focus on health and balance aligns well with sustainable initiatives. Brands can capitalise on this overlap by offering products that enhance both environmental sustainability and personal wellbeing.



The Track & Trend:

This group is driven by the latest trends and mainstream popularity, which today, often aligns with kindness to the planet. Their regular use of social media means much greater visibility and understanding of the impact of their purchases. The brands they follow and purchase from aligns with the value of their friends and followers.



The Tech Voyager:

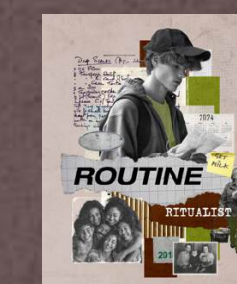
Focused on the latest technology and gadgets, the Tech Voyager's interests often match the Eco Guardian's dedication to environmental impact. Whilst they may not be excited by certain holistic practices which focus on connecting with nature instead of engaging with technology, their passion for innovation and pursuit of new tech ensures they are sourcing the latest gadgets often use energy more efficiently.

These attitudes tend to have different primary motivations that do not inherently prioritise environmental sustainability. For brands focusing on eco-conscious strategies, understanding these differences is crucial for effectively targeting or adapting their approaches to potentially bridge these gaps.



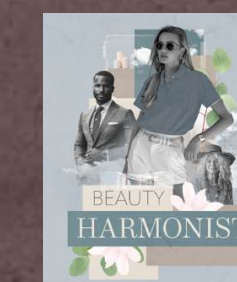
The Savvy Saver:

Primarily focused on budget-conscious decisions, the Savvy Saver will prioritise cost over all other factors; if a brand offers a product deal which features packaging that cannot be recycled, this would not deter the Savvy Saver. Where brands raise prices in order to provide greener ingredients and/or packaging, they will lose the loyalty of this group.



The Routine Ritualist:

This consumer type values consistency and tradition, often sticking with long-used products and habits. Unless their established routines already include a focus on sustainability, they may be less open to adopting new, eco-friendly products that require a change in their habitual consumption. Their primary drivers are reliability and familiarity, which might not necessarily align with an environmental focus, unless those habits were environmentally oriented from the start.



The Beauty Harmonist:

This attitude focuses on aesthetics and a harmonious lifestyle, which can at times intersect with a preference for products that are sustainably produced...when also beautifully-designed. Where brands design eco-friendly products whose formulations and packaging are kind to the planet yet less aesthetically pleasing, will see the Beauty Harmonist turn to other options.



Labs of the future

Whilst we're seeing certain healthcare and pharmaceutical brands, products and formulations tapping into some of the biggest trends of the year(s) ahead, their innovation is made possible by some of the world's most advanced laboratories conducting the breakthrough research that proves the efficacy of key ingredients. We explore some of the biggest longevity labs to watch as they shape the future of a healthy lifespan.

Calico



Calico

Founded in 2013, Calico is a pioneering biotech company focused on understanding ageing and lifespan. Unlike traditional firms, it blends academic and industry strengths to drive long-term, high-impact research. Using advanced technology and computing, Calico develops interventions for age-related diseases, with a growing pipeline of potential therapeutics.

Collaborations, such as with the Broad Institute of MIT and Harvard, are key to its work. Their partnership, launched in 2015, was extended in May 2024 through September 2029, now emphasising age-related neurodegeneration. This renewed effort aims to advance ageing research and early-stage drug discoveries, leveraging new technologies to explore neurological diseases in ageing populations.



Altos Labs

Founded in 2022, Altos Labs is a biotech company dedicated to developing life-extension therapies by restoring cell health and resilience. Backed by \$3 billion in funding, including investment from Jeff Bezos, Altos has recruited top scientists like Jennifer Doudna and Shinya Yamanaka to advance cellular rejuvenation research.

Blending academia and industry, Altos fosters innovation in longevity science. In August 2024, it launched the Institute of Computation (IoC), led by Dr. Hana El-Samad, to harness AI and computational biology in decoding cellular resilience mechanisms.

HEALTH NUCLEUS



HLI / Health Nucleus

The Human Longevity Institute founded in 2013 by genomics pioneer Dr. J. Craig Venter, HLI is a biotech company focused on extending healthy lifespans through precision health. It integrates whole genome sequencing, advanced imaging, and diagnostics to detect and manage age-related diseases.

Its flagship service, Health Nucleus, offers personalised assessments for early intervention and tailored healthcare. In January 2025, HLI partnered with SleepScore Labs to merge genomic insights with sleep data, developing AI-driven, personalised sleep programs to enhance health and longevity.





Juvenescence

Juvenescence is a clinical-stage drug company focused on extending healthy lifespan by targeting ageing mechanisms to prevent age-related diseases. Using AI and data science, it accelerates the development of small molecules, biologics, and cell therapies. By early 2025, it aims to have five medicines in Phase I or II trials, positioning itself as a leader in longevity science.

In 2022, Juvenescence invested in MDI Therapeutics to advance serpin-based therapies for fibrosis. Their collaboration supports the development of an oral PAI-1 inhibitor, targeting chronic fibrotic diseases and progressing through Phase I clinical trials.

Oisín Biotechnologies

Oisín Biotechnologies is a pioneer in genetic medicines targeting cell senescence to combat age-related diseases. Using its proprietary SENSolytics® technology and the non-viral Fusogenix™ PLV delivery system, Oisín selectively eliminates senescent cells, promoting longevity and health.

In September 2024, the company published preclinical data in Cell showing the efficacy of its follistatin (FST) gene therapy. The study demonstrated significant improvements in muscle mass and function, highlighting FST's potential to enhance healthspan and mitigate age-related decline.

Elysium Health

Founded in 2014, Elysium Health translates cutting-edge research into clinically validated health products for longevity. Collaborating with top scientists and Nobel laureates, it develops innovative supplements like Basis, which supports cellular health by replenishing NAD+ levels, Matter for brain health, and Mosaic for skin ageing.

In December 2024, a study by Elysium and the University of Oxford in Ageing Cell linked elevated homocysteine to accelerated ageing. Findings showed that targeted B-vitamin supplementation lowered homocysteine levels, potentially slowing ageing in individuals with mild cognitive impairment.

Gameto

Gameto is a female-led biotechnology company focused on redefining women's reproductive health, and actively addressing the issue of accelerated ovarian ageing. This can lead to infertility, early menopause, and extended periods of poor health for women. Its mission is to synchronise ovarian ageing with the rest of the body, aiming to redefine female reproductive longevity and tackle the root causes of gender inequality in health.

In February 2025, the FDA approved Gameto's Investigational New Drug application for Fertilo, marking the first induced pluripotent stem cell (iPSC)-based therapy to enter Phase 3 clinical trials. Fertilo aims to mature eggs outside the body, reducing hormonal stimulation and associated risks in IVF procedures.

Navigating healthcare design

In today's rapidly evolving healthcare landscape, branding is about more than aesthetics - it's about trust, credibility, and consumer connection. Whether developing a new product or repositioning an existing one, brands must navigate a complex ecosystem of regulations, shifting consumer expectations, and the growing tension between heritage and modernity. To stand out in a crowded and increasingly digital-first market, healthcare brands must master several critical areas, crucial to creating healthcare brands that feel both credible and compelling.



Our Creative Lead for Healthcare, **Mike Peacock** has curated his key thoughts when navigating through the creative challenges that face Health & Longevity.

mike@freethebirds.com



Clarity

In healthcare branding, clarity is key. A focused message that highlights your unique selling proposition (USP) or point of differentiation (PoD) is far more impactful than a diluted approach that attempts to cover too much ground.

By homing in on the specific attributes that set your product apart, you not only strengthen its positioning but also carve out a distinct space in the market.



Constraints

Healthcare packaging and communications operate within complex regulatory frameworks that differ significantly across regions. Designing without a clear understanding of these constraints can lead to costly last-minute revisions.

Early awareness of country-specific regulations ensures that creative solutions remain not only innovative but also compliant - saving both time and resources.



Capturing attention

In an era of shrinking attention spans, healthcare brands must be instantly recognisable across both physical and digital touchpoints. Consumers make rapid decisions, whether browsing a pharmacy aisle or scrolling online, meaning a design that is clear, direct, and visually compelling is essential.

Prioritising key claims and a strong USP ensures that your product cuts through the noise and engages audiences effectively, no matter the platform.

Navigating healthcare design



Greenwashing

The demand for natural alternatives in healthcare is growing as consumers become increasingly conscious of what they put into their bodies. In response, many brands, both new and established, are rushing to position their products as "natural" solutions. However, without credible evidence to support these claims, brands risk misleading consumers and eroding trust.

Today's consumers are more informed and discerning than ever, scrutinising product messaging with a critical eye. Overstating natural credentials or making vague, unverified claims can backfire, damaging credibility and brand integrity.

To stand out for the right reasons, claims must be truthful, transparent, and backed by evidence — clear, unambiguous, and aligned with regulatory standards.

Authenticity isn't just a buzzword, it's a necessity.

Semiotics



When developing or rebranding a healthcare product, there's a crucial balance between fitting in the category, leveraging familiar visual and semiotic codes to convey efficacy, and differentiating to stand out in a crowded market. Striking this balance ensures that consumers instantly recognise a product's purpose while also making it distinct enough to capture attention at shelf.

A strong example of this is Pepto-Bismol. While pink is not a traditional category colour for digestion products, the brand has successfully claimed it as its own, creating instant recognition and differentiation within the sector. This principle extends more broadly to the divide between direct-to-consumer (DTC) and retail brands, where visual language and semiotics often diverge — DTC favouring minimalism and lifestyle cues, while retail leans on more traditional healthcare design codes.

As Gen Z and Gen Alpha become the dominant consumer demographic, it will be fascinating to see how semiotics evolve. Will traditional healthcare aesthetics hold their ground, or will the sleek, modern approach of DTC brands reshape the sector?

Final Thoughts



The healthcare sector is in a state of transformation. As digitalisation, generational shifts, and changing consumer expectations reshape the landscape, brands must evolve to remain relevant. The key to future-proofing healthcare branding lies in precision, authenticity, and adaptability:

Own a clear, compelling USP, without diluting the message.

Navigate compliance strategically, seeing it as a creative challenge, not a constraint.

Avoid greenwashing pitfalls, prioritising honesty over hype.

Master semiotics, leveraging familiar codes while finding ways to stand out.

The brands that succeed will be those that blend credibility with innovation, ensuring they remain trusted, relevant, and impactful in an ever-evolving healthcare market.

Challenges & Caution points



In the longevity and healthcare market, brands and businesses must consider not only how a product is created – from the design of packaging to the chosen formulation and delivery system – but also how it's marketed and introduced as part of a broader range that complements both itself and the brand.

We identify some of the key concerns flagged by pharmaceutical experts, as well as the shifting attitudes of consumers.



Our Client Lead for Healthcare, **Lindsey Figarol** has combined her experience of the sector with her observations on its future. She highlights key concerns when it comes to bringing a healthcare product to market, whilst keeping a firm eye on the future of longevity.

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The risk of polypharmacy

Across the globe, we exist in an ageing population. It's reported by the UN that "by the mid-2030s, there will be 265 million individuals aged 80 and older. Because of this, there are a growing number of older individuals at risk of polypharmacy, whereby the use of multiple medicines can cause them to counteract one another, and even lead to risks of adverse reactions. This risk also rises when we understand how regularly individuals today self-diagnose, seek guidance online, and have varying degrees of trust in different resources.

According to the National Library of Medicine, in 2022 "the pooled estimated prevalence of polypharmacy in the 54 studies reporting on [the issue] in all medication classes was 37%."

As shared by Nicholas Hall in the CHC 2025 VMS report, a GNC survey of 1,000 multivitamin users revealed that while 63% take multivitamins to fill a diet or nutritional gap, only 31% are certain they are getting the recommended daily value of nutrients from their multivitamin. This suggests a level of trust in the concept of supplementation but uncertainty about the efficacy or quality of specific products. The same GNC poll showed that most (82%) take a multivitamin of their own accord, while only 27% do so at the recommendation of their healthcare provider. This might imply a degree of self-directed trust in supplements, potentially influenced by factors other than professional advice.

To avoid growing risks of polypharmacy in the broader vitamins and supplements market, brands must operate with transparency and strong communication of research and efficacy so customers can better understand how they are supporting their bodies most effectively.

Challenges & Caution points

The application debate

Recent discussions have highlighted consumer skepticism regarding the efficacy of various vitamin and supplement delivery formats, such as powders, liquids, and transdermal patches.

While traditional tablets and capsules remain prevalent, alternative formats like gummies, powders, and liquids are gaining popularity due to their convenience and sensory appeal. However, concerns persist about the bioavailability and absorption rates of these alternatives. For instance, the effectiveness of vitamin patches is debated, with experts noting that certain micronutrients may not adequately permeate the skin, leading to reduced efficacy compared to oral supplements. Other brands have years of consumer satisfaction as evidence of their efficacy. And yet consumers must be made aware of how certain vitamins may be more effective than others when delivered in this format.

Additionally, the lack of stringent regulation in certain parts of the supplement industry contributes to consumer wariness, emphasizing the need for products with solid scientific backing and third-party verification for purity and bioavailability.

In light of these concerns, consumers are advised to seek products that have undergone third-party certification, to ensure quality and accurate labelling. Additionally, consulting healthcare professionals before beginning any supplement regimen is recommended to tailor choices to individual health needs and avoid potential adverse interactions.

Building trust

In the wake of the Covid-19 pandemic, which fundamentally shifted the way we approach healthcare, we exist in an era of preventative healthcare. With this has come, as we shared, a much higher number of resources from which consumers can purchase healthcare products. From e-commerce to social shopping, there is an overwhelming abundance of information available, making it increasingly difficult to discern which resources to trust.

Marketing efforts often add to this complexity, as bold claims can be misleading, creating confusion rather than clarity. Additionally, while certain products may highlight trending ingredients, the actual amounts included can be negligible, offering little to no real benefit to our bodies. Understanding not just what ingredients are present, but also their efficacy and how they interact within our systems, is key to making informed and beneficial health choices.

It is for these reasons that brands must operate with a high level of transparency and authenticity, owning their own shortcomings where they may occur, making clear where products or ingredients have clinical research backing them, and encouraging consumers to do their research and educate themselves on the best formulations for their needs. Even better, providing resources on their own websites or social channels with impartial, third party experts contributing their insights, will build much greater confidence in today's sceptical consumer.

The opportunities

Understanding your sector

In a space experiencing staggering growth and diversity, yet with more growth potential and space for innovation (in particular for burgeoning private and own label brands), do you understand where your brand's potential lies?

Understanding your audience

Once your path to growth becomes clearer, establishing the customers who offer the potential for success and for whom your products are most desirable, is the next step in ensuring you are successful in the launch of a new brand or product. Do you recognise which consumer attitude you hold power with, and is this the audience you wish to nurture?

Understanding your product

With your audience comes a clear goal of what it takes to build a product which truly appeals to them. From ingredients and formulation, to packaging and pricing, brands must approach every stage of production with honesty, integrity and authenticity. Does your range meet the standards of the educated and demanding customer of today?

Understanding your communications

The means by which you deliver your product to your desired consumer is key. The world is retuning to the high street, and experiential retail combined with intelligent, targeted online platforms - not to mention the ongoing growth of social commerce - is an art form which must be learned in order to deliver to your target audience. Do you know where your consumers are sourcing and shopping?

Understanding your competition

Today's competitive landscape extends beyond rival brands, it includes shifting consumer expectations and the nuanced trade-offs that come with new product or redefining a brand goal. It's essential to evaluate not just who you're attracting, but who you risk leaving behind. How do you grow your audience without diluting your brand?

Understanding your identity

It may be that you are approaching a new product - or a revamp of your brand - in order to enter a new space or appeal to a new consumer audience. Is your brand identity clear, and are you able to retain your existing consumer base, whilst entering a mission to engage with new attitudes?



Here to help

We hope you found our insights valuable, highlighting the opportunities within the health and longevity sectors, as well as the evolving consumer attitudes shaping this space.

We'd love to help you uncover where your brand's potential lies, how to stay ahead of emerging trends with high growth potential, and how to connect meaningfully with consumers who have greater awareness and more nuanced demands than ever before.

We'd be delighted to present these findings in a tailored format, crafting a personalised report that positions your brand to lead in this evolving landscape.

Get in touch - we're excited to explore what's possible together.

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