

2020



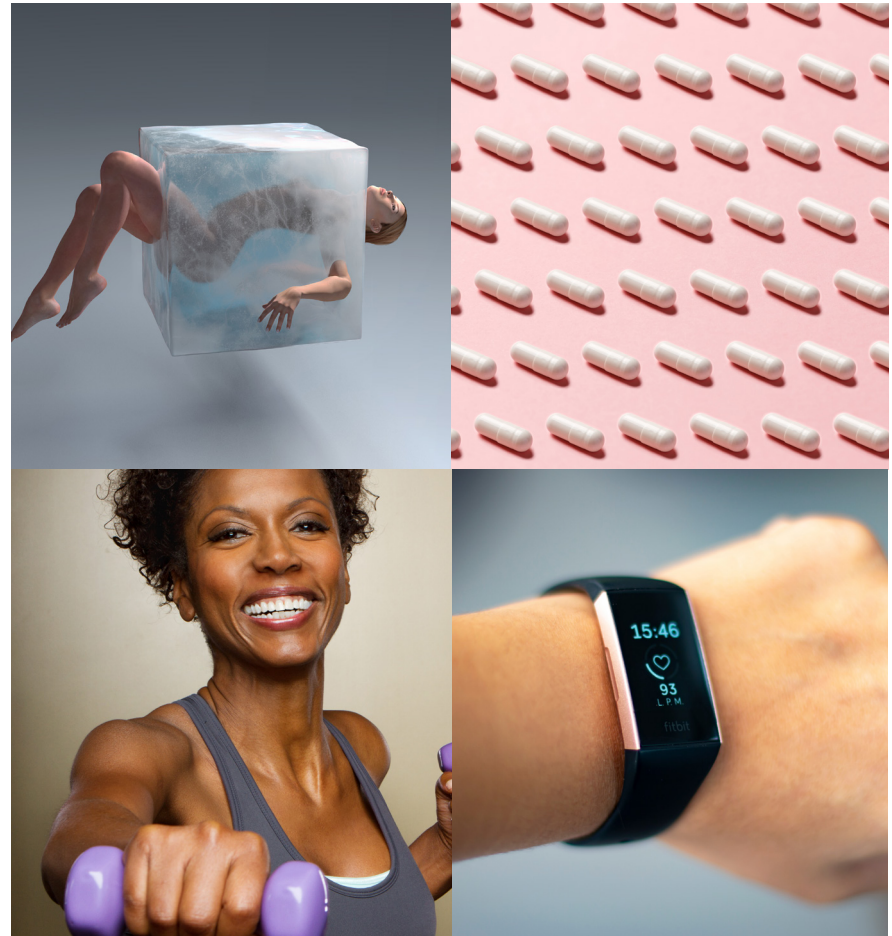
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HEALTH + WELLNESS TRENDS

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INTRODUCTION

Health and Wellness enters 2020 as a comprehensive, pervasive mindset that applies to myriad industries. Per Mintel, 77% of U.S. adults report that they are, “actively trying to improve their health in some way.” What people mean by “health” has broadened, and the mindset is now a fully holistic one. Social media and big tech took over the 2010s, with significant consequences for mental health.

This year, the start of a fresh decade, will be much about reframing our relationship with tech, setting limits while also (and somewhat paradoxically) increasing personalization. Consumers will seek simplicity in the name of health and wellness, while simultaneously pushing past old taboos, creating spaces for in-person engagement, and accepting the brands that cater to their health and wellness needs, both mental and physical.

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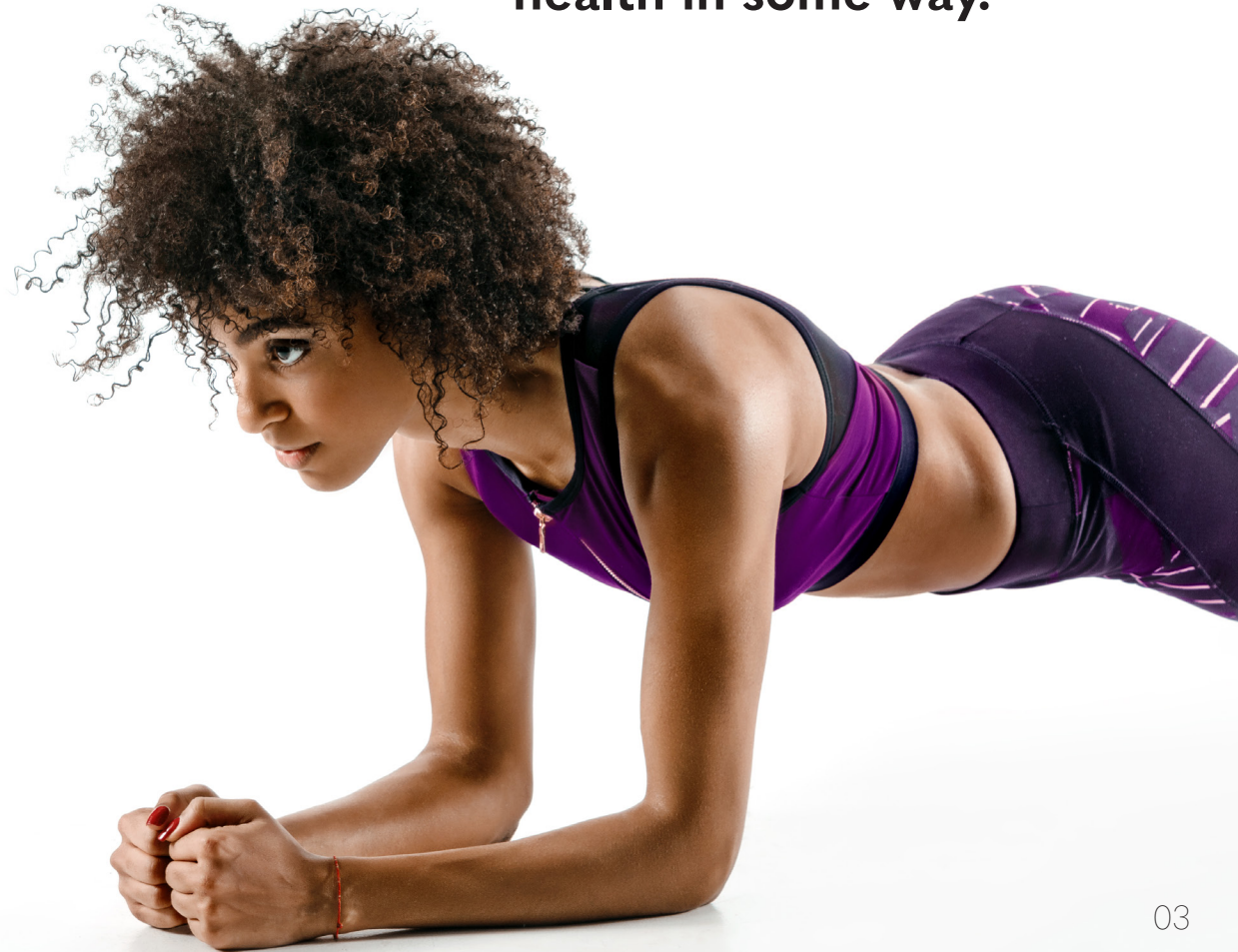




image: Chillhouse NY

The rise of cryotherapy exemplifies the holistic approach to wellness. A hyper-cooling sauna experience, cryotherapy has become popular in boutique wellness spas, such as Chillhouse in New York City. Cryotherapy has been used for relaxation and weight loss, as well as a treatment for pain relief, anxiety, depression, and inflammation. Another example of how physical wellness has evolved into a holistic approach is illustrated by the influx of DTC vitamins and supplements. One such brand is Hum, which, in addition to an array of vitamins for both beauty and general health, has introduced The Big Chill®, an adaptogenic daily vitamin that is “clinically proven to help the body manage stress.” Supplements are particularly popular with younger consumers.

HEAVILY HOLISTIC

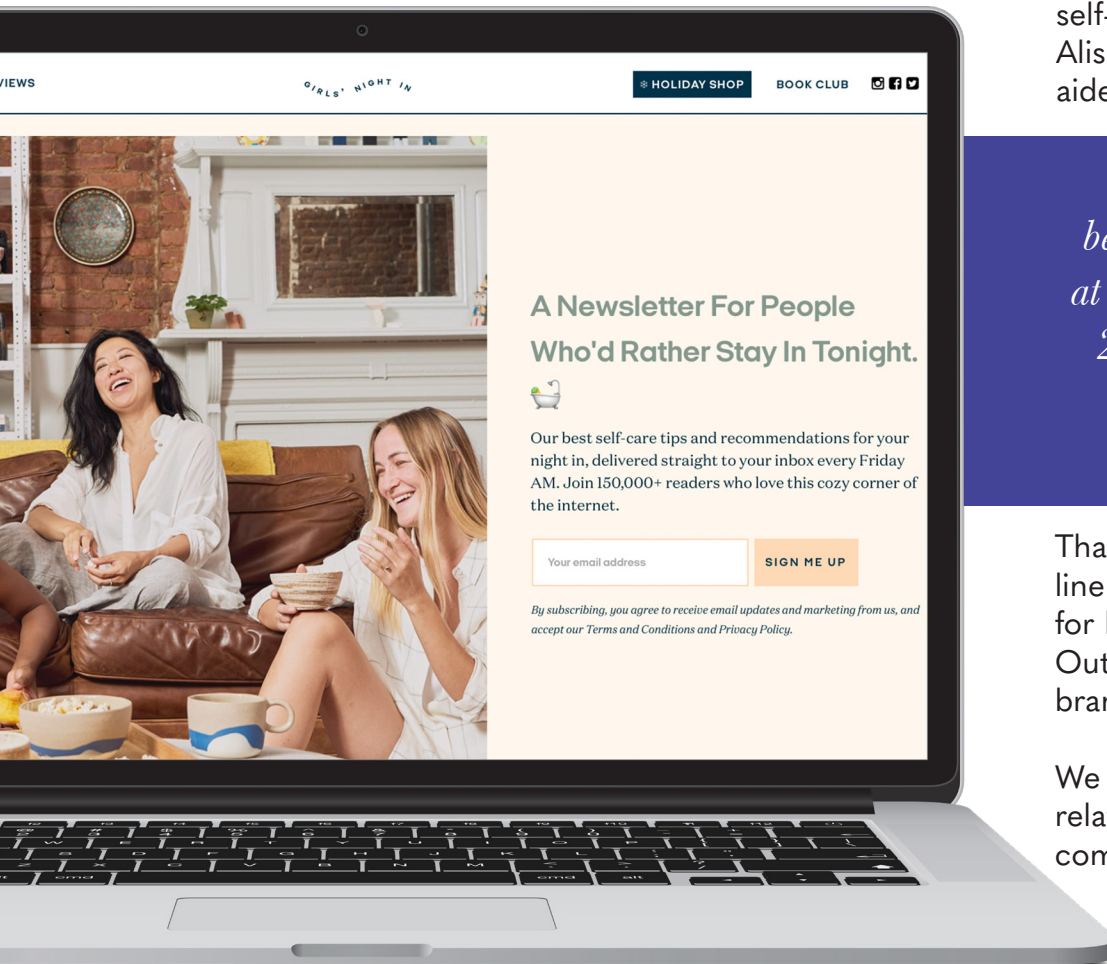
For consumers, wellness no longer applies only to physical looks, nor does it happen overnight. The products, or wellness experiences, that soothe overstimulation and stress, while also offering a physical benefit, are best suited to modern consumers. Stress and mental issues have been brought to the forefront of society; between 2007 and 2017, the suicide rate among 10-to-24-year-olds in the U.S. spiked 56%. Relatedly, overall life expectancy in America dropped consecutively from 2014-2017, largely due to an increase in drug overdoses and suicides. Yet rather than continue to evade the issue of mental health, consumers and brands within the health and wellness umbrella are discussing and working to address it.



of 25-44-year-olds
**currently take
supplements
and plan to
continue doing so
this year,**

followed by 57% of
35-to-44-year-olds.

CRAVING COMMUNITY



Another reaction to the immense amount of time spent online is increased feelings of isolation. This relates to the mental health issues described in the prior section, but the way in which brands—and consumers—are prioritizing new communities that promote health and wellness is a trend that requires its own focus. Many of these spaces, ironically, at least start online. One such example is Girls' Night In, a community and newsletter for women focused on self-care. Describing her company's beginning, founder and CEO Alisha Ramos described how the time was ripe for a resource that aided stress and burnout:

“The timing of starting Girls’ Night In was really great because a lot of people...were feeling the same things I was at the same time. [That time] was at the end of 2016, early 2017, where there was a lot of anxiety and people feeling burnt out from the news cycle and everything happening in the world.”

That community, in addition to weekly newsletters, now has an off-line book club. Girls' Night In has emerged as a unique platform for like-minded brands—such as Care/of Vitamins, Sweetgreen, and Outdoor Voices—to reach (mostly) Millennial women through rich brand content.

We feel that the health and wellness brands that solve for digitally-related stress with calming, unique, and genuine on- and off-line communities will thrive.

TECH: LESS + MORE = DIFFERENT

Consumers are now turning to tech to solve the problems caused by tech in the first place. A new trend with Gen Zers is minimalist phones, from brands like Light Phone and Palm, that offer limited capabilities, such as calls and texts only. Modern youth are also digitally detoxing through a bevy of new apps, that limit or even reward time spent off of smartphones. Noticing the adverse effects that tech has had on older generations, some younger Americans are reframing their relationship with tech in order to balance or improve their mental health.



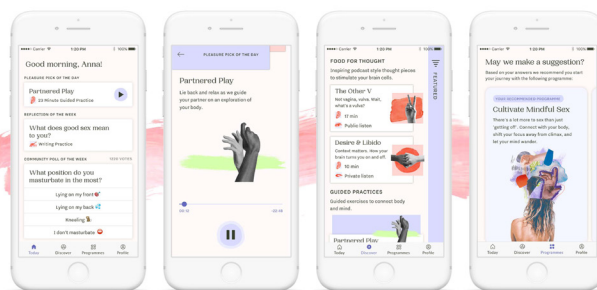
That said, tech is also supercharging health and wellness, particularly with smart wearables. **The smart wearables market is predicted to double from its 2018 value by 2022, to \$27B.** Describes Shelten Yuen, VP of Research for Fitbit:

"We've advanced from simply counting steps to bringing health information once only available from a lab or a clinical environment directly to consumers' wrists." In 2019, Fitbit was acquired by Google for approximately \$2.1B. Such highly personal data in the hands of big tech may concern some, but the growth within this market shows that many consumers love smart wearables and have—or will be—incorporating them into their health and wellness regimens. Whoop, a sleep and activity tracker, which secured an additional \$55M in Q4 of 2019, has tied its growth to the rise of holistic health and wellness. **The results-oriented company reports that, after four months of wear, users sleep and travel better, drink less, experience fewer injuries, and have a reduced resting heart rate.**



BEYOND TABOO: FEMCARE

2019 was the year that innovative intimate care products for women really started to gain traction. From brands with fresh, empowering messaging to vagina gyms, intimate care vitamins to skincare for down there, women have a world of new products and experiences to choose from. This trend, too, is a holistic one: sexual wellness, physical health, and mental health are now all connected. One example of tech playing in this space is the app Ferly; through podcasts, articles, and a journal, Ferly helps women and sexual assault survivors gain sexual confidence and security.



Sanitary protection (tampons and pads) was a \$3.2B market in 2018; feminine intimate care is much smaller but is expected to grow 3.4% by 2025. Spurred by brands such as Thinx, Cora, LOLA, and ThePerfectV, in 2020 younger women will continue to explore and grow the femcare category, bringing these startups mainstream. Older women have their own intimate health and wellness revolution: menopause, a severely overlooked life stage, is finally being addressed by brands. The opportunity for products in this category is enormous and will ramp up in 2020. As Rochelle Weitzner, founder and CEO of menopause skincare brand Pause Well-Aging pointed out, “As women, we’ve


been bombarded with beauty messages our whole lives, but none of them include menopause. It’s like we turn 45 and suddenly we’re invisible. **We couldn’t help but ask ourselves, what’s up with that?** since in the U.S. alone, there are 70+ million of us 45 and over, the average age menopause starts. That’s almost a quarter of the country’s population — a pretty big number the beauty industry has chosen to ignore.”



SOMETHING IN THE

AIR

As we work to improve the greater outdoors with sustainability initiatives, less attention has been paid to indoor environments. This year that will change; between now and 2023, the global air purifier market is anticipated to grow about 9 to 12 percent each year, reaching \$33B. For several years now consumers have sought fewer or free-from ingredients, whether when shopping for groceries, cleaning, or beauty products. Now, they are interested in purging indoor environments of the pollutants that can come from carpets, paint, and cleaning supplies. This consumer attention also explains the spike in the popularity of houseplants. 2019 saw the rise of DTC plant subscriptions and myriad Instagram feeds dedicated to plants as self-care. Consumers wish to purify, beautify, and even recall a touch of nature to their interiors.



This trend connects to holistic health and wellness as, writes *Well + Good*, “New peer-reviewed data clearly articulates that air pollution—especially ultrafine particles generated from burning substances like natural gas, wood, and incense—has the potential to harm every organ in the body.” Consumers are burning sage—which can remove 94% of air bacteria—while also turning to sleek, \$800 devices from startups like Molekule. Air purification also coincides with the rise of wellness tech, as there are now products available that pair with a smartphone app or wearable component. As countries face air quality issues and consumers continue to seek better or free-from, modern air purifiers will become more mainstream and this trend will have implications for other industries, beauty in particular.

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IN THE (BLUE) ZONES



In 2005 *National Geographic* introduced the concept of Blue Zones, five parts of the world where people lived much longer, happier lives. Each region, whether in Sardinia Italy or in Okinawa Japan, evinced the commonalities of constant, moderate exercise, primarily plant-based diets, social engagement, and family first values. In 2020, we expect the part about exercise, in particular, to be a health and wellness trend.

Pressed for time, consumers are hyper-engaged with short workouts. This coincides with the Blue Zones mentality, whereby shorter exercise periods—but more of them—lead to health, happiness, and wellness. Blue Zones are waging a war against sitting: as the movement's blog describes,

“Just as humans are not meant to be wired all the time, we are not meant to be sedentary for most of our days. It’s not a coincidence that we are restless, stressed, anxious, and suffer constant...pains.”

The theme of moving more often, if even for a shorter time, aligns with Blue Zones and consumer preferences, and is already hitting boutique fitness studios and YouTube. In 2019, SoulCycle introduced a 30-minute, “super-efficient” version of their typical 45-minute class, announcing, “you asked, we delivered.” Relatedly, part of the success of apparel brand Outdoor Voices has been their less intense approach to movement. As consumers accept a broader approach to “doing things,” how and when workouts fit into their lives will be reframed.



CONTACT

Stella Rising excels at building strong, effective brands, connecting those brands with the consumers who will love them. With research and strategy at our core, we are at the forefront of change, propelled by our understanding of the trends that will define key industries.

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PROBLEMS WE SOLVE



**Propelling Fast
Growth for
Emerging Brands**



**Driving Conversions
for DTC Brands**



**Finding
New Customers**



**Moving Product
Off the Shelf**



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