



FS x SPATE
THE *FUTURE* OF
WELLNESS

2024 Edition

About FS



A global future forecasting agency, with over 22 years of successful forecasting and proven methodologies



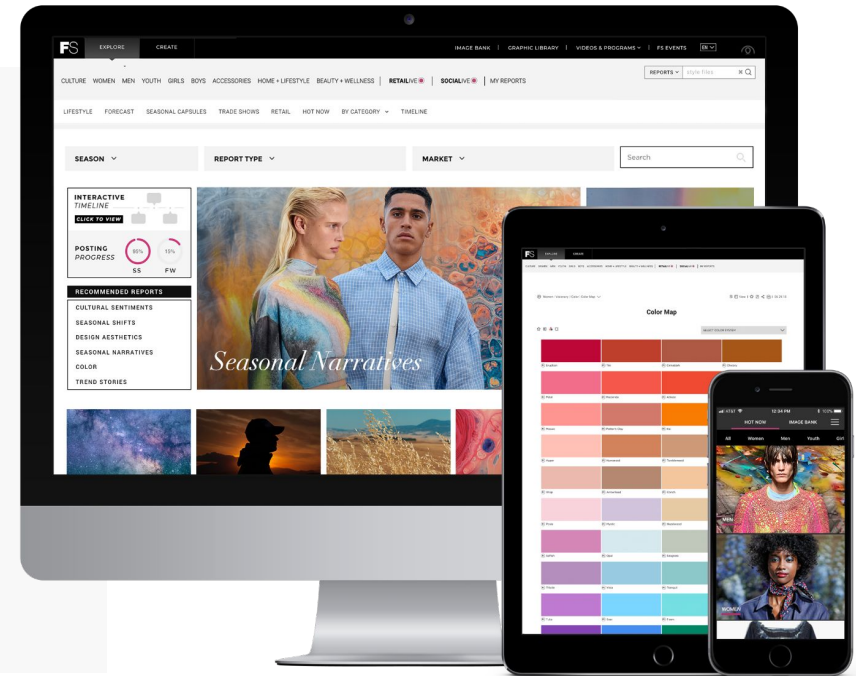
We are made up of passionate individuals based in 6 global offices and headquartered in New York City and London



Service brands, retailers, and manufacturers in 50+ countries, across many consumer-facing industries



We offer advanced inspiration through our trend platform, which combines human insight with cutting-edge, AI-augmented tools



Markets We Cover:

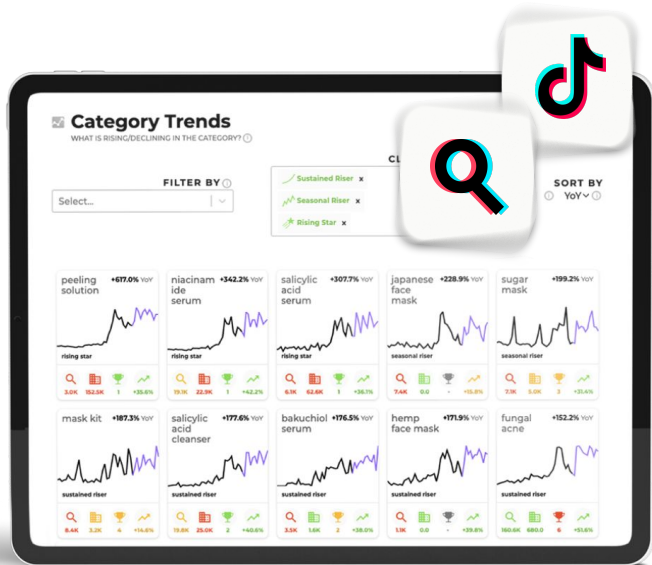
- Fashion
- Home + Interiors
- Beauty, Health + Wellness
- Food + Drink
- CPG & FMCG
- Consumer Electronics
- Transportation
- Media + Entertainment
- Packaging
- Hospitality + Travel
- Lifestyle
- Agencies + Advertising
- Retail
- Manufacturing

Find out what FS can do for your industry, brand or business

fashionsnoops.com/request-demo

hello@fashionsnoops.com

About Spate



Spate is your machine intelligence solution for finding the next big consumer trend. Spate is a Y Combinator-backed company, founded by two ex-Googlers Yarden Horwitz and Olivier Zimmer who started Google's Trendspotting division and spotted trends such as face masks, turmeric and cold brew (ie Google Skin Care Trends Report, Google Food Trends Report).

How do we do this? We tap into publicly available consumer data (anonymous and aggregated) to identify exciting shifts in consumer behavior.

The Spate dashboard analyzes over 20 billion online search signals, and over 60 million beauty, wellness and food-related TikTok videos to answer three crucial questions across these industries.



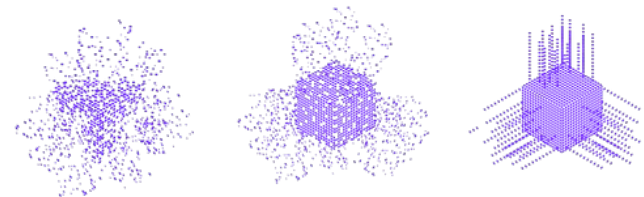
WHAT'S THE NEXT BIG TREND?



WHO'S OWNING THE SPACE?

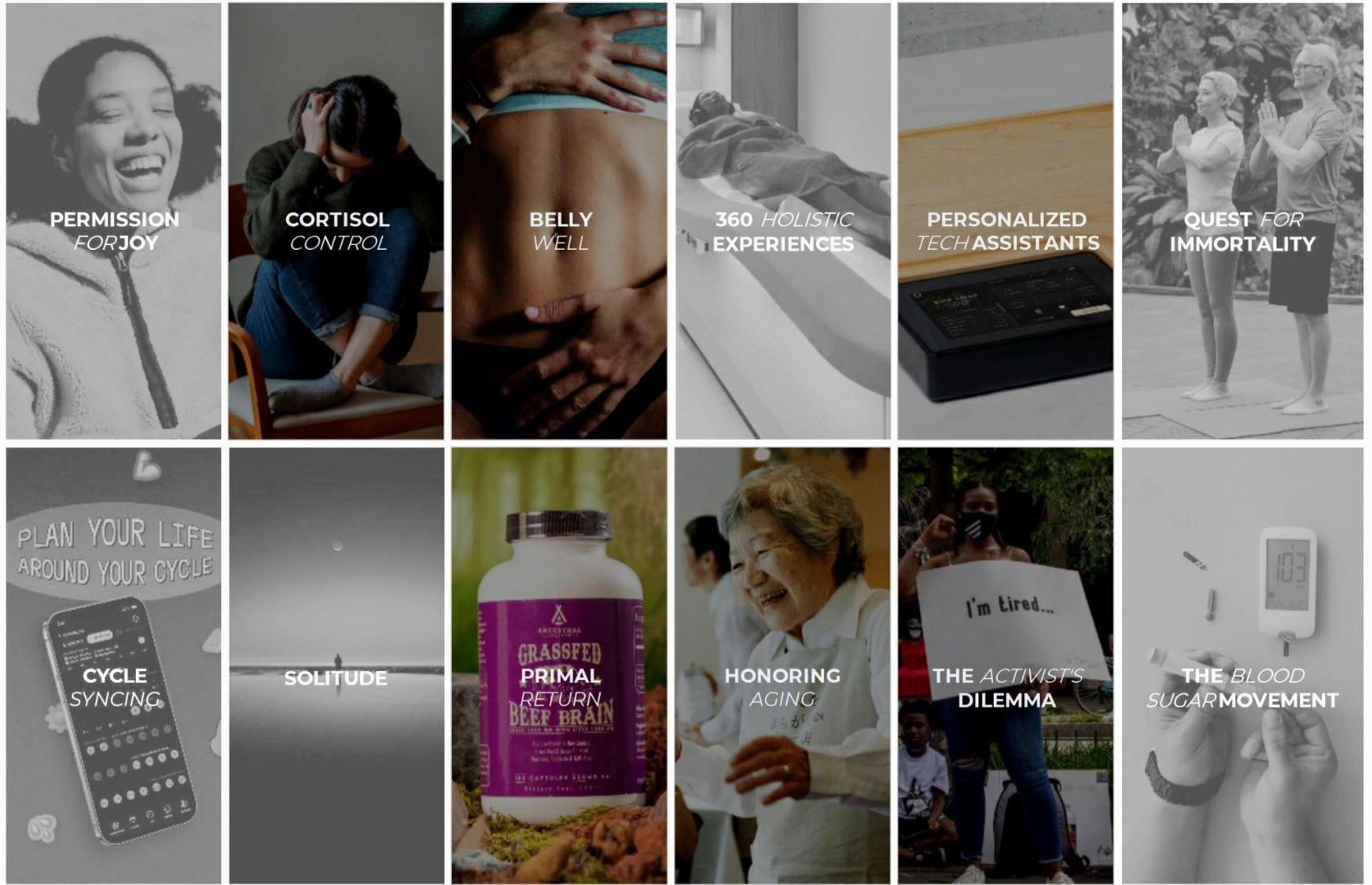


HOW TO POSITION THE TREND?



Find out what Spate can do for your industry, brand or business:

[BOOK A DEMO TODAY](#)



You are viewing an abbreviated version of The Future of Wellness. [Schedule time with us](#) to get a walk-through of the full report.



CORTISOL CONTROL

Emerging Opportunities

CORTISOL CONTROL



Daily wellness rituals will incorporate stress-support supplements

Consumers turn to trusted brands that offer scientifically-backed supplements in order to conveniently help balance their daily stress levels. Brand **Ready To** offers supplements formulated with traceable ingredients proven effective in clinical studies, like their **Ready to Chill** supplement with bioavailable forms of ashwagandha to help the body flush excess cortisol. Vitamin Bs and vitamin D support cognitive health and encourage serotonin and dopamine production, and chelated magnesium increases overall relaxation. All of their products are third-party tested to guarantee the active ingredients in each capsule, further alleviating stress by purchasing a trustworthy and tested supplement.

CORTISOL CONTROL

Cortisol-blocking skincare will be the next frontier in psychotherapeutic beauty

Stress affects the skin through UV rays, pollution, smoke, and chemicals, causing skin to look tired and age quicker. Therefore, brands explore incorporating active ingredients that can reduce stress, like **Neurophroline**—the first cosmetic active ingredient to block the production of cortisol in skin and reverse the effects of stress. It works by releasing endorphin neuropeptides that break down stress-causing chemicals sitting on the skin, reducing cortisol levels by nearly 70% in just a few hours after application. After two weeks of use, results show more evenly-toned and radiant skin, and better protection from stress-related aging.



Emerging Opportunities

CORTISOL CONTROL



Consumers will adopt more somatic exercise

Consumer interest in somatic healing continues to rise, with the hashtag **#somatichealing** accumulating over 505 million views on TikTok. TikTok users like **@theworkoutwitch** and **@healthwithholland** are educating their followers on identifying the signs of high cortisol levels and how to lower them naturally through movement. Somatic exercises are slow and controlled movements that help with mind-body connection that can alleviate pain, relieve stress, and release stored trauma. Emotions and trauma are believed to be stored in the hips, so the movements are usually centered around hip mobility stretches and breath awareness.

SPATE DATA INSIGHT



SOMATIC PRACTICES

“Somatic therapy” experienced a +36.1% YoY increase in Google searches, representing an average monthly search increase of +15.3 K, showing the growing popularity of stress-relieving somatic practices.



STRESS-BUSTING SUPPLEMENTS

There was a +48.1% YoY growth in searches for “cortisol mocktail” on Google, while “cortisol + supplement” experiences +46.7% YoY growth, pointing to an increased interest for stress-reducing ingestible solutions.



CORTISOL CONTROL

“Cortisol control” and “reduce cortisol” amassed a combined 860.4K monthly views on TikTok, representing a +13.3% and +15.2% MoM increase respectively, speaking to the consumer need for effective stress reducing routines.

Source: Google Search data, year-over-year growth comparing the past 12 months ending November 2023 vs the 12 months prior (US Rising Clusters).

Source: TikTok Data, ending week of December 17th.



**BELLY
WELL**

Emerging Opportunities

BELLY WELL



Fiber will become a central focus

Increasing fiber levels becomes a central health and nutrition issue, as rising rates of GI cancers in younger generations drive a need for more convenient options.

Supergut's Gut Health Booster is a prebiotic fiber blend that contains resistant starch that digests slowly, feeding beneficial bacteria in the gut. Results from a clinical study confirmed that the supplement balanced blood sugar levels, supported weight loss, and improved sleep. The powder "add-to-anything" mix makes it easier than ever for consumers to get their daily fiber intake on the go.

Emerging Opportunities

BELLY WELL

Mental health will be influenced by the gut-brain connection

The [@guttalkgirls](#) are educating their audience through TikTok and their podcast, [Gut Talk](#), about gut health and how it links to anxiety and mental health. The sister duo talk about how to identify gut problems through common symptoms, and share tips to improve digestion and bloating. They also speak to their experience with anxiety and how fixing their gut issues allowed them to stop taking anxiety medication.



Emerging Opportunities

BELLIWELL



Snacks reinvent themselves to become gut-healthy

Probiotic snacks are rising in popularity, as opposed to taking an everyday probiotic supplement. **Mighty Pop** claims to sell the first gut healthy soda with pre, pro, and postbiotics, with each can containing one billion live probiotic cultures and three grams of prebiotic fiber to promote healthy digestion. **BelliWelli**'s snack bars promise zero bloating for those with IBS and GI issues, and are packed with probiotics, fiber, and protein for a digestion-friendly snack on the go.

SPATE DATA INSIGHT



THE GUT-BRAIN CONNECTION

Consumers are making the connection between their emotional and mental health and gut health, with “anxiety + gut health” up +21.8% YoY and “Gut health + depression” up +25.9% YoY.



MICROBIOME-SUPPORTING DIET

Searches for gut health, probiotic, and prebiotic supplements grew YoY +7.7%, +20.2%, and +24.2% respectively, while gut-boosting foods also grew, with kefir at +20.2% and colostrum at +14.1% YoY.



GUT HEALTH

“Gut health” experienced +19.4% MoM growth on TikTok, speaking to growing consumer interest in nurturing their digestive wellness and educating themselves on how to boost their GI tract.

Source: Google Search data, year-over-year growth comparing the past 12 months ending November 2023 vs the 12 months prior (US Rising Clusters).

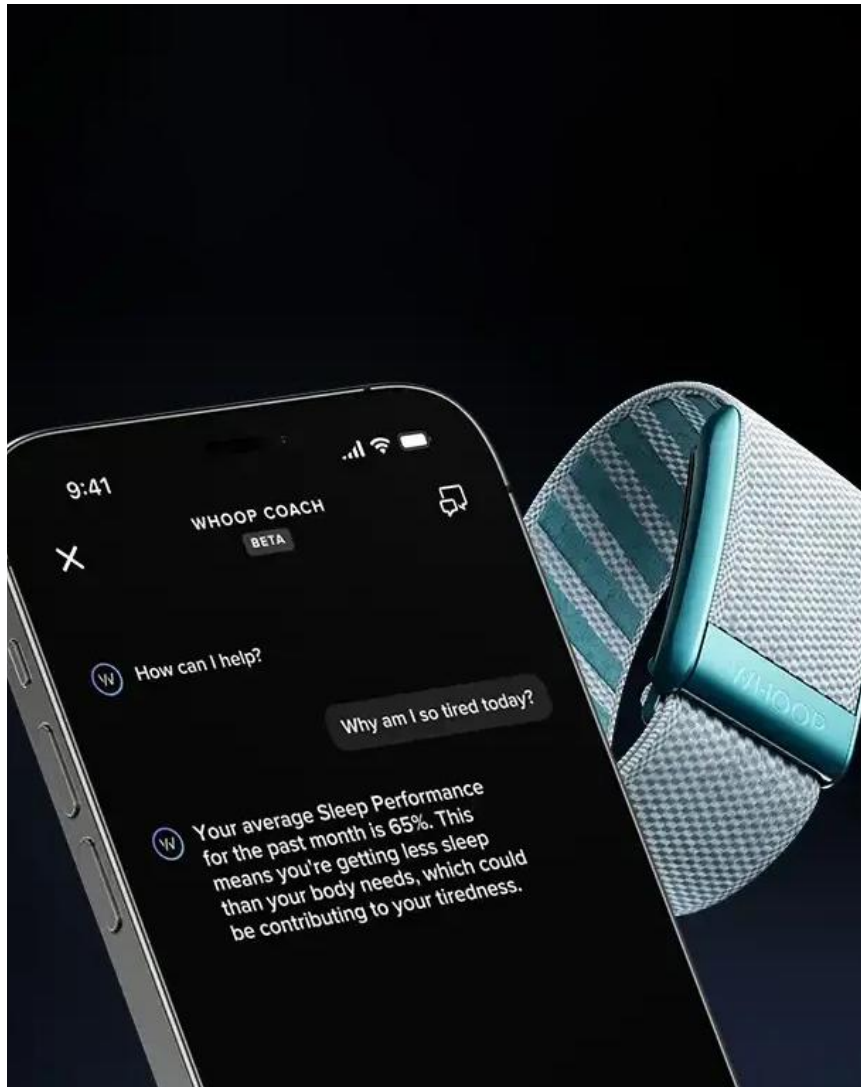
Source: TikTok Data, ending week of December 17th.



PERSONALIZED TECH ASSISTANTS

Emerging Opportunities

PERSONALIZED TECH ASSISTANTS



Immersive therapy experiences will become more accessible

Immersive healing practices like ice bathing have regained popularity, as research highlights the effectiveness of these treatments in reducing stress and rejuvenating the body. Now, we're seeing these experiences become more accessible to consumers, blending with other trending wellness practices to offer a unique experience, seen in **Othership's breathwork app**. The company offers guided breathwork sessions through their app to help regulate emotions and the nervous system, and features a section of specially designed breathwork guides that are meant to be used during cold plunges and ice baths to maximize healing power.

PERSONALIZED TECH ASSISTANTS

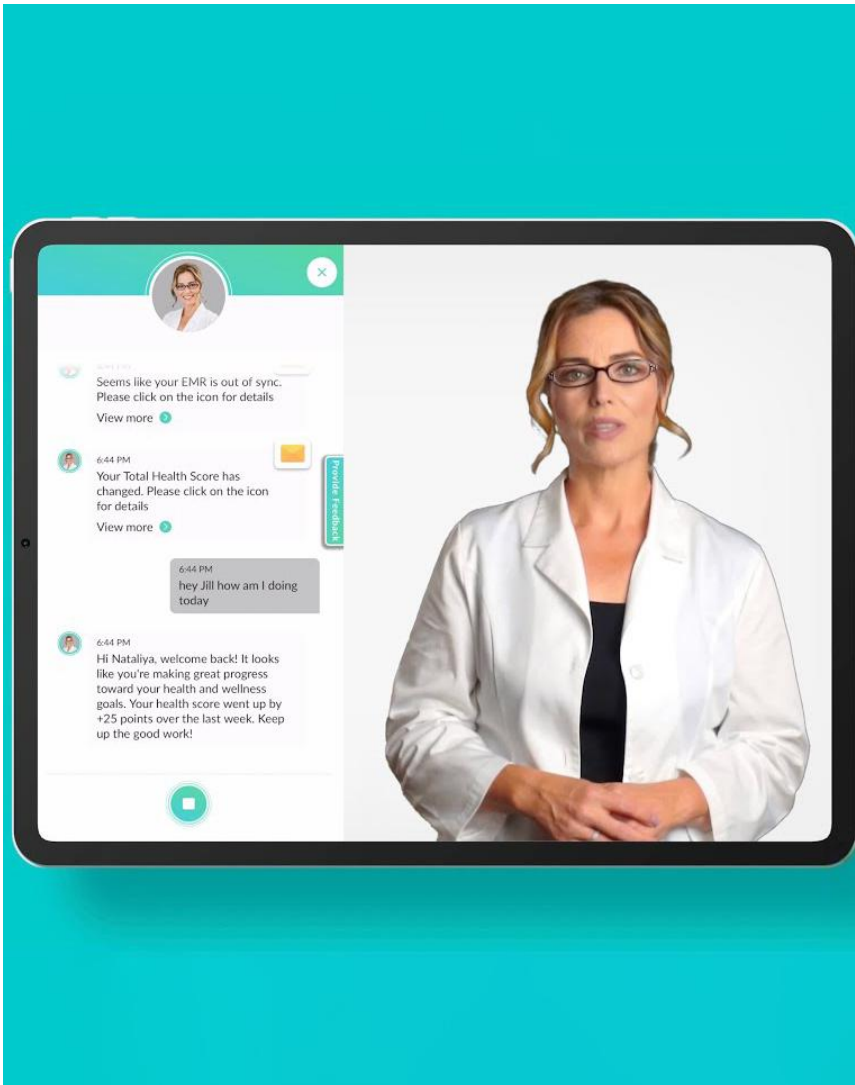
Consumers will seek out AI-supported nutrition

VersaWare's smart kitchen appliances use AI to help people reach their nutrition goals through an app that syncs to the brand's intuitive mixing bowls and cutting boards. By scanning barcodes or choosing fresh ingredients in the app, integrated screens on the appliances show accurate nutritional breakdowns of food as they are added to the appliances, along with showing recipes directly on the screen. Having real-time nutritional value of entire meals helps users make any meal align to their nutrition goals.



Emerging Opportunities

PERSONALIZED TECH ASSISTANTS



Healthcare will adopt personal AI assistants

Apps are incorporating AI assistants to make healthcare more seamless, building on the health tech movement that empowers users to take control of their wellbeing. **MediKarma**'s JILL.ai is the app's personalized health assistant that can answer specific questions and create plans to improve users' health scores, and help them better understand their overall health. The app has options to set goals for sleep, weight loss, chronic illness management, and more.

SPATE **DATA** INSIGHT



BIOTECH ADVANCEMENTS

Biotechnology, which represents the synergy of technology and nature to create sustainable solutions, saw +14.0% YoY growth on Google, affirming its increased presence.



ALL ABOUT AI

AI continues to be at the top of mind for consumers and brands alike: "artificial intelligence" was up +89.0% YoY on Google with an average monthly search volume of 320.2K.

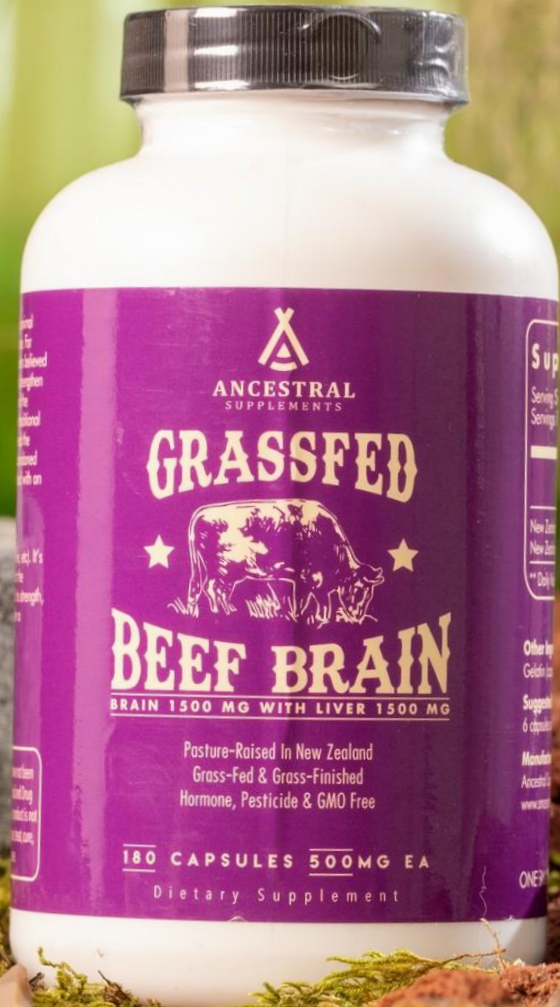


HEALTH TECH

Health tech is also a growing industry, as we increasingly look to technology to support our humanity: On TikTok, the hashtag "health tech" has racked up 91.3M views.

Source: Google Search data, year-over-year growth comparing the past 12 months ending November 2023 vs the 12 months prior (US Rising Clusters).

Source: TikTok Data, ending week of December 17th.



PRIMAL RETURN

Emerging Opportunities

PRIMAL RETURN



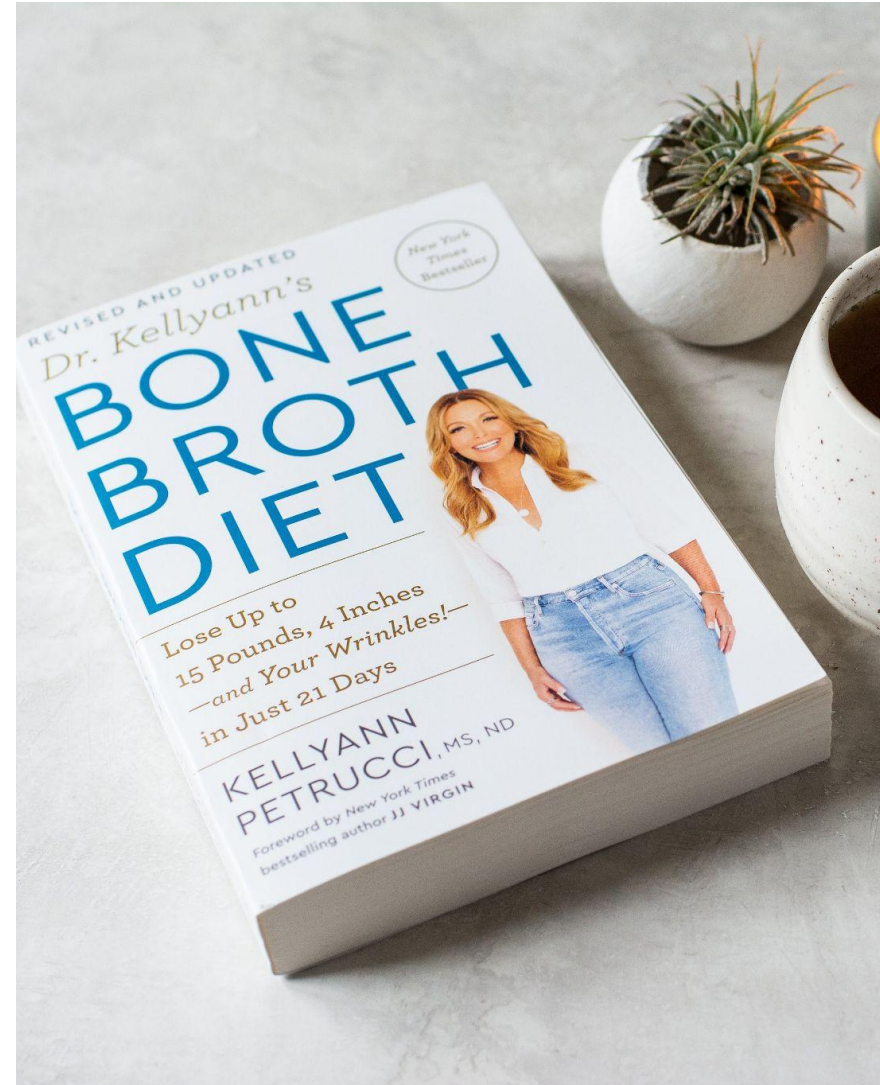
Animal-based ingredients will be formulated into skincare

As consumers explore new animal-based ingredients to support their skincare needs, we see a rise in these raw ingredients making it into formulation. Made with pure emu oil, marshmallow root, and calendula flower, the **Everything Balm** from Primally Pure strengthens the skin barrier, calms redness, and has an anti-inflammatory effect on skin. Emu oil from Australian emus can soothe eczema and dryness while delivering fatty acids deeper into the skin.

PRIMAL RETURN

Consumers will explore new diets like bone broth nutrition

Dr. Kellyann Petrucci, M.S., N.D., author of Bone Broth Breakthrough, is advocating for the bone broth diet for its weight loss and anti-aging benefits. Dr. Kellyann's diet programs, from a 1-Day Cleanse & Reset program to a 21-Day Bone Broth Diet, include a variety of her bone broth and flavored collagen powders, easy enough to incorporate into any existing routine. Along with encouraging anti-aging and weight loss, regular bone broth consumption is known to boost digestion and libido while lowering stress and fatigue.



Emerging Opportunities

PRIMAL RETURN



Colostrum will be a popular ingredient for supplements

Known also as “liquid gold” for its deep yellow color, colostrum is the first milk produced by a cow after giving birth. Rich in essential nutrients like proteins, polypeptides, antibodies, and prebiotics, the benefits of colostrum include improved immune systems and gut health, increased lean muscle mass and reduced recovery times, increased skin elasticity, and even enhanced mood and sleep. **WonderCow** Colostrum Powder is dried and pasteurized at a low temperature to preserve as many nutrients as possible for consumers to reap the benefits with ease.

SPATE DATA INSIGHT



QUESTIONING VEGANISM

While veganism is still a prominent diet and lifestyle worldwide, we're seeing interest wane for this once ubiquitous trend: YoY Google searches for "vegan diet" were down -12.9%, while on TikTok it experienced a MoM view decrease of -9.1%.



RETURN TO MEAT

YoY Google searches for "carnivore diet" experienced +84.7% growth, while MoM growth on TikTok for the same term was +51.7%, showing that consumers are curious about meat-based diets, representing a drastic reversal of years of plant-based trends.



TALLOW TREND

Beef tallow has become a growing beauty and wellness trend, racking up 146.8K monthly views on TikTok for "beef tallow skincare," while Google searches for "beef tallow" shows +44.4% YoY growth.

Source: Google Search data, year-over-year growth comparing the past 12 months ending November 2023 vs the 12 months prior (US Rising Clusters).

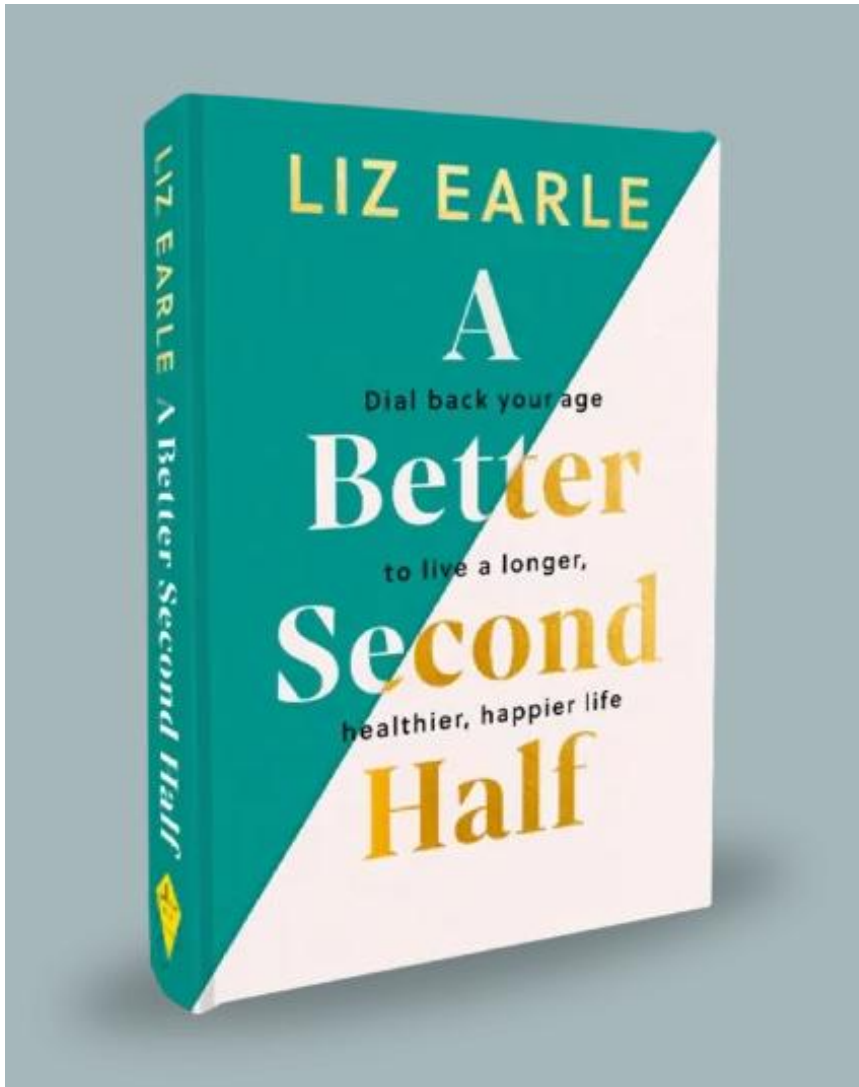
Source: TikTok Data, ending week of December 17th.



HONORING AGING

Emerging Opportunities

HONORING AGING



Consumers will embrace their aging journey

As consumer attitude around aging shifts and we see a stronger desire to celebrate the later years in life, consumers look to resources like **Liz Earle**—an advocate for aging better and embracing the second half of life through her blog, Liz Earle Wellbeing. The blog covers topics from beauty and aesthetics to menopause to travel and relationships, all in the context of aging. Her book, *A Better Second Half*, details ways people can focus on health and happiness to thrive and prosper in their later years.

HONORING AGING

Senior centers will create more opportunity for community socialization

With experts and life coaches emphasizing the importance of relationships and socialization as we age, senior community centers create more opportunities for their members to connect.

Seniors Out and Proud is a community support group of senior LGBTQ members in Southeast Utah. Founder Deb Hall states that LGBT seniors are “about four times more likely to be aging alone and are two times more likely to have never had a family,” making this group an important and meaningful part of seniors’ lives. The group gets together to fight discrimination and loneliness, and organizes social activities like kayaking, movie nights, biking, and more.



Emerging Opportunities

HONORING AGING



Retail will adapt to embrace the needs of seniors

In an effort to fight loneliness in the elderly community, Dutch supermarket **Jumbo** introduced a slow lane checkout for chatting called the Kletskassa, where customers can slow down and chat with the cashier while paying for groceries. The family-owned business with over 700 locations also opposes self-checkout stations in favor of face-to-face human interaction, and plans on opening chat corners for customers to socialize over coffee.

SPATE DATA INSIGHT



EMBRACE THE GRAY

Consumers are embracing gray hair: Google YoY searches for “gray blending” were up +30.9%, as the popular gray blending method helps consumers seamlessly transition to growing out their gray hair.



MATURE SKIN NEEDS

A growing aging population necessitates targeted solutions for mature skin needs: on Google, “mature skin makeup” experienced +21.5% YoY growth, while “mature skin” experienced +23.8% growth.



MEDIA REPRESENTATION

There's a strong need for positive media representation for older demographics: the Golden Bachelor TV show, which focused on matchmaking for older adults, generated massive buzz on TikTok, amassing 7.3M monthly views.

Source: Google Search data, year-over-year growth comparing the past 12 months ending November 2023 vs the 12 months prior (US Rising Clusters).

Source: TikTok Data, ending week of December 17th.

Emerging Opportunities

THE ACTIVIST'S DILEMMA



Activists will seek wellness toolkits

In a country of political dichotomy and injustice, the call for **Love-Based Activism** is crucial. The concept relies on three key pillars. The first pillar, Collective Care, establishes that everyone is cared for, as in order to care for others, one must begin by caring for themselves. The second pillar, Transformative Justice, encourages peaceful protest, de-escalation, and a removal from violence. Finally, Radical Hope embraces a future of possibility and new opportunity, and to envision a future that everyone can strive for.

THE ACTIVIST'S DILEMMA

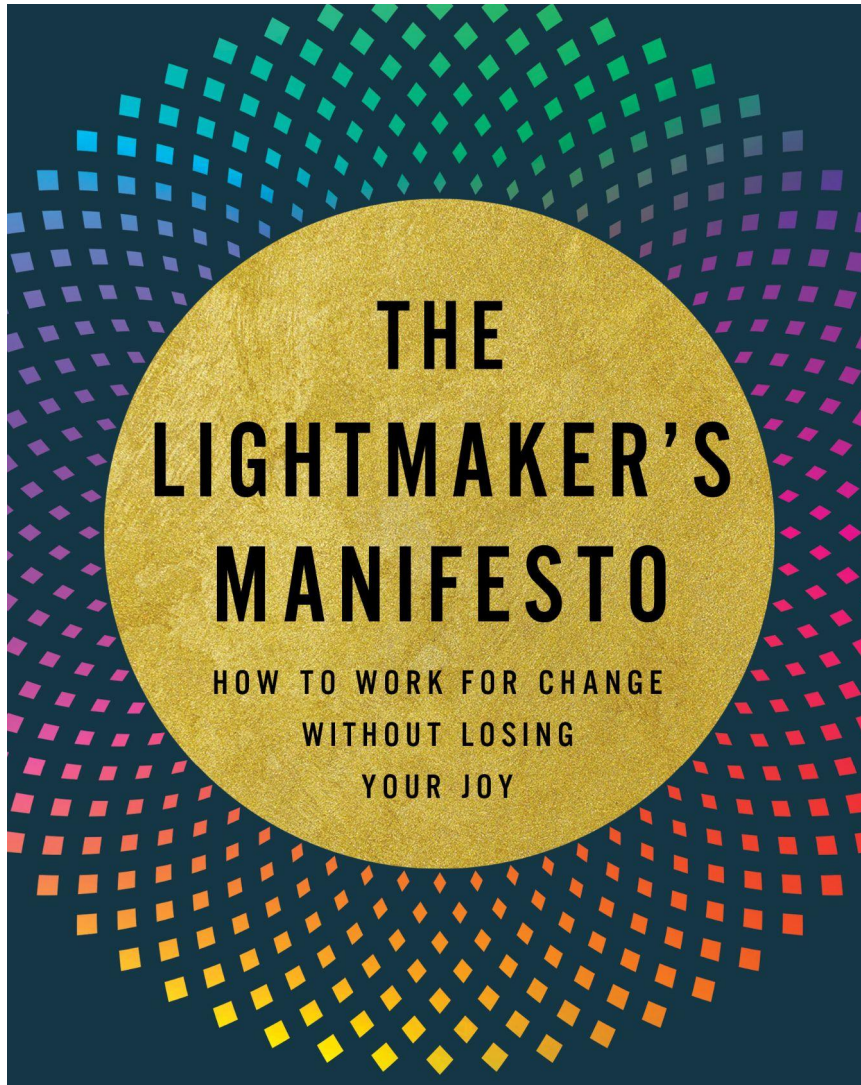
There will be a rise in resources to combat misinformation

FactStream and other fact-checking apps become more relevant as misinformation continues to be shared through social media and news outlets. The real-time fact checker uses data to prove or disprove statistics used by politicians on social media, and may even be used on live TV in the future as an automated feature during news reports. Fact checkers like this would not only relieve the public from fear-mongering, but also discourage reporters and politicians from spreading disinformation in the first place.

The screenshot shows the FactStream app interface. At the top, the FactStream logo is displayed in a dark blue header. Below the header, the date "Jun 12, 2018" is shown. The main content area is divided into two rows of news items. Each row contains a news item on the left and a fact-checking overlay on the right. The first news item is from "YourNewsWire.com" at 2:43PM CDT, with the headline "Investigators: Anthony Bourdain was killed by Clinton operatives." The fact-checking overlay is a yellow box with a fire background, containing the text "PANTS ON FIRE! POLITIFACT TRUTH-O-METER" and the PolitiFact logo. The second news item is from "Donald Trump" at 7:25AM CDT, with the headline "According to a Canada release, they make almost 100 Billion Dollars in Trade". The fact-checking overlay consists of four cartoon figures with long noses, representing a "Pants on Fire" rating.

Emerging Opportunities

THE ACTIVIST'S DILEMMA



Activism will evolve to embrace intentional wellness practices

The Lightmaker's Manifesto by Karen Walrond helps activists find the issues they are most passionate about. The book has journal exercises, daily intention-setting, and reminders for self-compassion to shift into the practice of activism without losing joy throughout the process. It is a reminder that activism can bring purpose, passion, and joy to one's life, and doesn't have to become an exhausting and negative experience.

SPATE DATA INSIGHT



ADDRESSING BURNOUT

Burnout is growing among activists, as we saw YoY Google searches for burnout continue to grow +2.5%, while on TikTok the term “activism burnout” saw 276.5 views, pointing to a need for coping strategies for those engaged in social justice.



MISINFORMATION

Google Analytics shows that searches for misinformation are trending upward, showing that the concept of misinformation is one of continued consumer interest in an era of deep fakes, AI-generated copies, and political mistruths.



COMPASSION FATIGUE

“Compassion fatigue” is an emerging trend, as empathetic consumers struggle to keep up with near-constant socio-political turmoil: the search term experience +18.7% MoM growth on TikTok and +1.7% You growth on Google search.

Source: Google Search data, year-over-year growth comparing the past 12 months ending November 2023 vs the 12 months prior (US Rising Clusters).

Source: TikTok Data, ending week of December 17th.

Thank you for reading

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