

2024

The Whole Health Navigation Guidebook

Forging our wellness identities through an
intentional whole health journey

THE “PRE” OF 2023

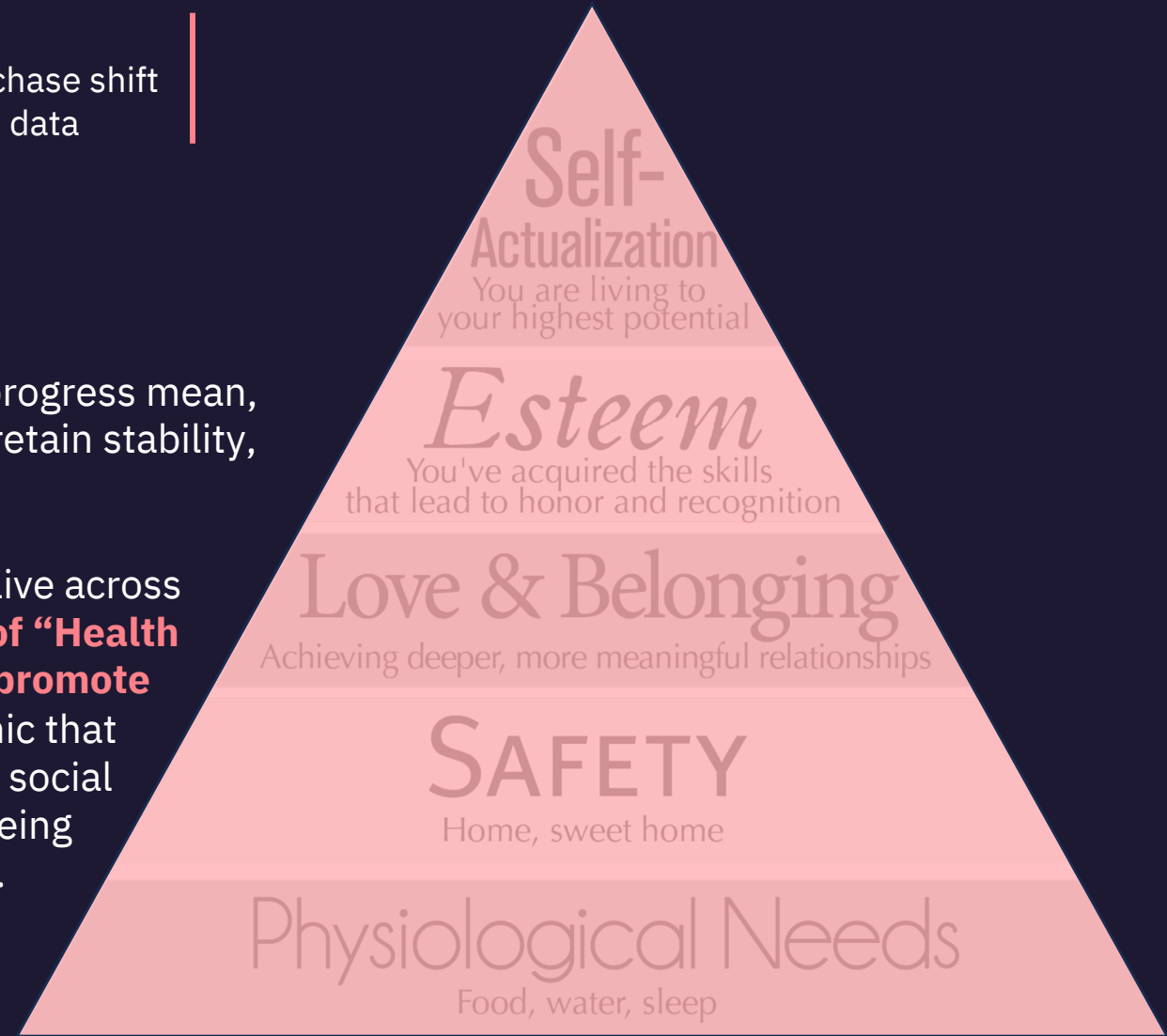
As we embark on 2024, and look back on 2023 and before, we have experienced a lot:

- A pandemic
- A new work environment
- New social norms
- Economic shifts
- Convenience-focused purchase shift
- Advancements in tech and data

THE “MORE” OF 2024

These changes have left us at a point of inflection. What does progress mean, on both a personal and societal level? How do we remain happy, retain stability, and feel optimistic?

People have realized that these are fundamental needs, yet they live across Maslow’s hierarchy. **They are centered around a broader notion of “Health & Wellness” that has created new norms, needs, and ways to promote your personal version of wellness.** Importantly – this is a dynamic that comes from an inward perspective, and then pervades through to social and societal interactions. The result – whole health is no longer being emphasized, it’s being navigated in specific routes and directions.

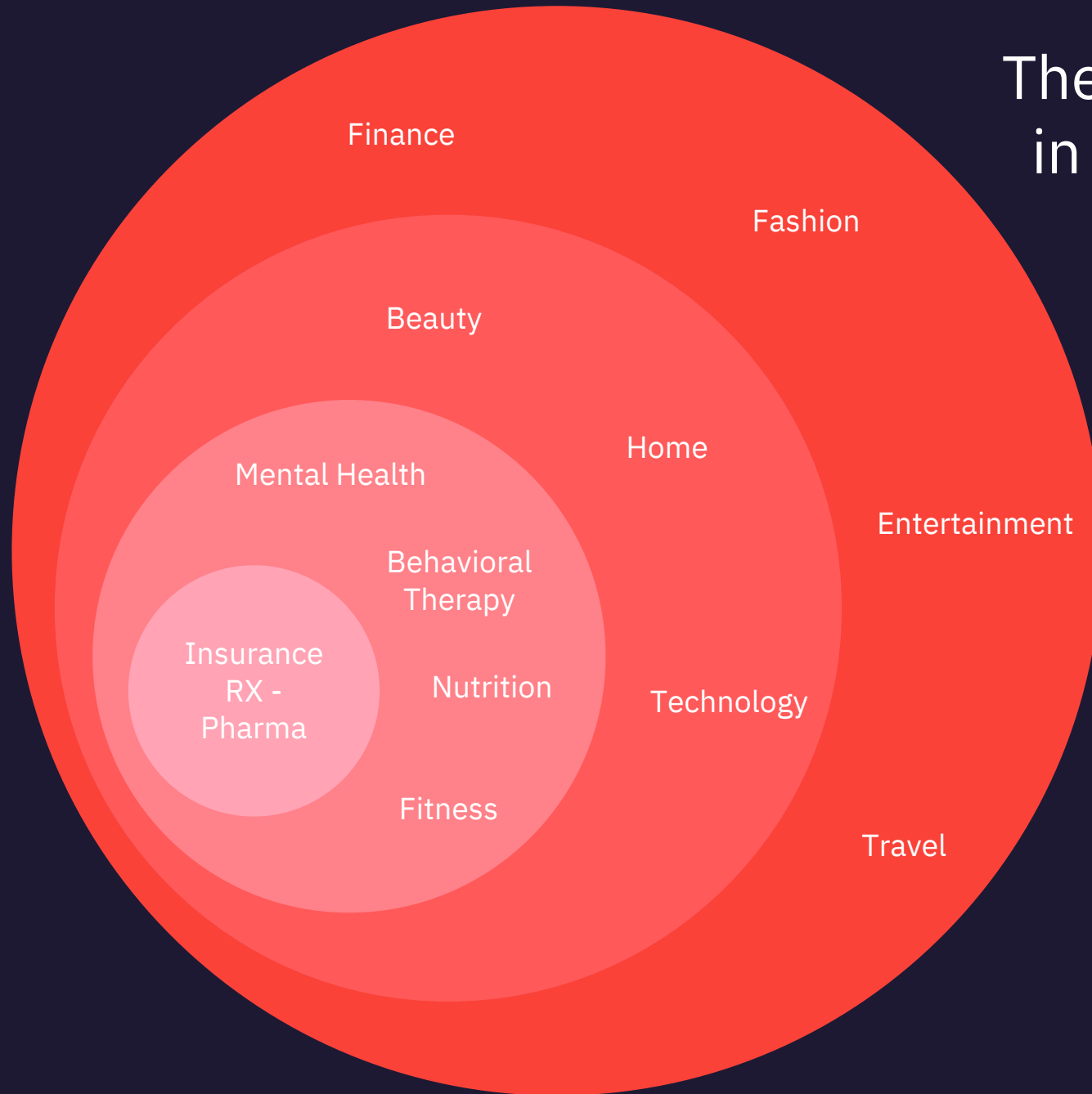


We call it ***WHOLE HEALTH NAVIGATION.***

[noun] The whole health notion is expanding our definition of health and wellness into the intentional discovery of identity through optimization and reflection.

Executive Summary **WHOLE HEALTH NAVIGATION**

- 1 Introspection – not just a state of mind, but a path to brand growth**
Embracing unique identities and brand personalization are growing in tandem across wellness and their adjacent industries
- 2 Self-discovery empowers individuals and undermines brand trust**
Increasing access to health information and resources can avoid the hassle of interacting with certain health and wellness services, but may hinder needed interactions that create the best outcomes
- 3 Health and wellness communities can elevate the media's role**
Communities that are built on empathy, acceptance, and collective wellness needs make marketers and brands connectors and advocates, providing a pathway to a higher quality ROI
- 4 Intentional journeys elevate brand value expectations**
Wellness isn't a sole purchase – it is an end goal where brand value means providing convenience, price, and quality to facilitate adoption



Whole health has expanded to encompass multiple industries

The wellness market in the United States is worth **\$480 billion**, and estimated to **grow 5-10% annually**

The Whole Health Navigation System

A new journey grounded by a newfound willingness to invest in the internal, leading to more autonomy, embrace of new communities, and the expression of these factors take to brand interaction

Internal Confidence Investment

Intentionally investing in themselves, aiming to boost their wellness from the inside out

1

Internal Foundation

2 Proactive Self-Reliance

Consumers have more options and more control over their healthcare journey than ever before.

3

New Forms of Community

Health is transitioning from being the responsibility of the individual to being a space for collective resourcefulness.

4

Value Experience

Setting new expectations around how they experience a product and services, considering factors like convenience and ease.

Societal Expression



1

internal confidence investment


Consumers are more intentionally investing in themselves, aiming to boost their wellness from the inside out

THE "PRE" OF 2023

Optimizing our
surroundings

THE "MORE" OF 2024

Increasing
Internal
Confidence
Investment
through
optimization
from the
inside-out



Whether through hobbies or outfit aesthetics, consumers are exploring themselves and finding security in their identities. They see whole health as a journey of discovery and action, building and enhancing their sense of self along the way.

Many Gen Zers, specifically, consider health and wellness adjacent to categories like retail. Even when they are focused on optimizing themselves from the inside-out, there is inherently a connection between that internal wellbeing and their self-expression in the external world.

As health touches many different categories and aspects of daily life, there are more ways to engage than ever, and consumers show their intentionality in their whole health by starting from within, such as reassessing what they eat.

Marketers can tap into these cross-category health and wellness needs as consumers seek tie-ins to purchase new products and services and make themselves feel better inside and out.



Self-Examination Using Technology, Medicine, and Fashion

WEIGHT LOSS:
**GLP-1 USE SKYROCKETS
ACROSS THE US**

300%

The increase of GLP-1 prescriptions in the US from 2020-2023

Whether for Type 2 Diabetes, weight loss, addiction management, or another newfound effect, millions of people in the US are looking to utilize GLP-1 drugs like Ozempic and Wegovy for health benefits.

FASHION:
**QUIET CONFIDENCE VS.
LOUD CONFIDENCE**



Finding your aesthetic – meaning, the you that you want to show to the world – is often the first step in self-confidence.

#cleangirl with 2B+ views, Quiet Confidence with 24M views on TikTok

TECH:
**BIO-HACKING TO
TACKLE LARGER GOALS**

71%

The percentage of people who express interest in taking a microbiome test to get personalized diet recommendations

Nervous System Regulation, balancing blood sugar fluctuations, and period cycle tracking are just some of the ways consumers have explored working with their bodies.

Sources: CNBC, JP Morgan, Foresight Factory




A Personal Investment Needs Personal Products

A strong component of identity is expressing it to others. Reach consumers where they are engaging, encouraging sharing and connecting around their core identity markers to create opportunities for brand advocacy. Message around associations between your brand and the "badges" that people can put on display by using your brand.

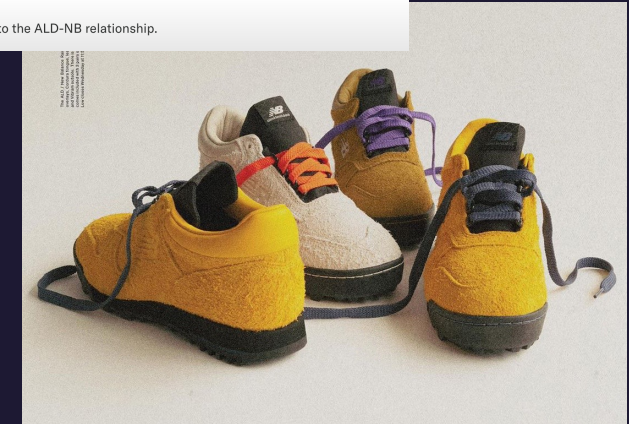
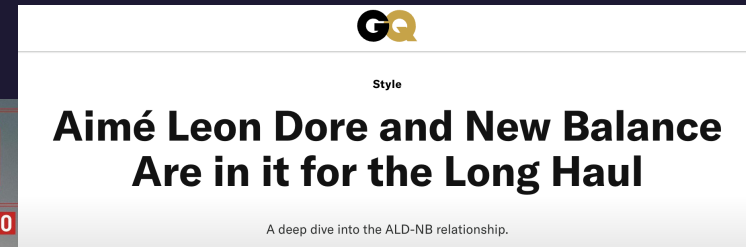
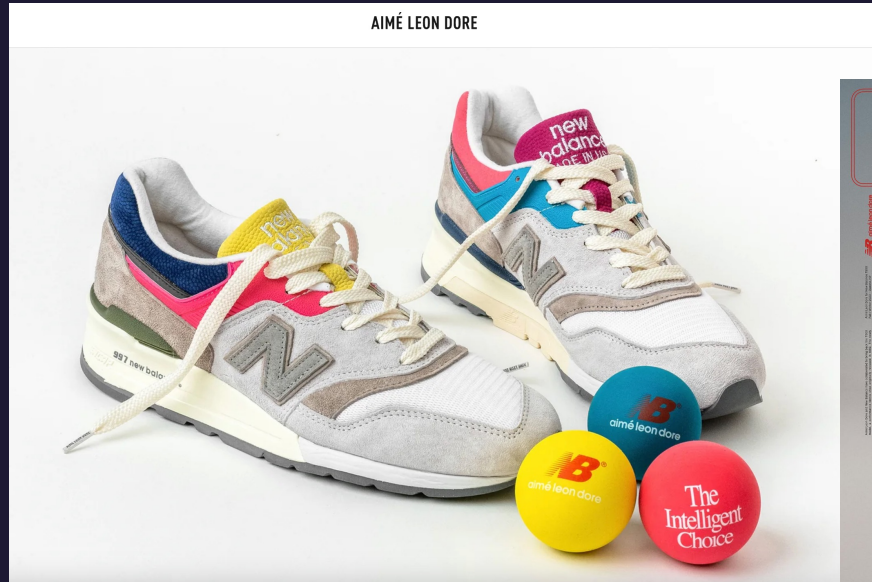
Stanley Tumblers have been all the rage, and new limited editions, like this collaboration with Target, have incited intense community engagement and fandom behavior.

Drink It All In

Only at 



Cross-Category Collabs Enable Exploration and Build Confidence



Brand collaborations can cement brand presence in a new category or in a category that serves as an extension of their own, helping consumers feel more comfortable exploring new categories as well— like Aime Leon Dore, luxury fashion brand, utilizing their **partnership with New Balance** to break into the sports apparel and athleisure markets. While Aime Leon Dore is known for cool, new fashion, their primarily young, male consumers are very much invested in the whole health space. This long-term partnership with New Balance that features limited releases or “drops” allows their consumers to stick with the brand and their “hypebeast” style of purchasing while hitting the gym.



2

proactive self-reliance


Consumers have more knowledge, more options, and more autonomy in their whole health journey than ever before

THE "PRE" OF 2023

Adoption of
digital tools to
aggregate and
supplement
health and
wellness

THE "MORE" OF 2024

Utilizing newfound
knowledge and
**Proactive Self-
Reliance** to initiate a
uniquely personal
health and wellness
journey



The consumer ecosystem has changed drastically, and digital resources are abundant, both within whole health and beyond. The breadth of options are simultaneously helpful and overwhelming.

There's a guide for seemingly everything – but there is also an abundance of potential misinformation around health and wellness, which impacts who consumers are willing to trust.

As a result of this onslaught, ***consumers are realizing that the best resource is themselves and their communities.***

As marketers consider owned content, organic engagement, AI initiatives, and typical paid efforts, they must rethink and reassess what trust-building means in this modern environment of increased personal autonomy.



Self-Reliance is Enabled by Access to Technology and Information, For Better or For Worse

CARE: FOREGOING DOCTOR VISITS

71%

The percentage of 18- to 34-year-olds who only seek out medical care when something is wrong

Instead of going to a healthcare professional, Gen Zers and Millennials are turning to social media to self-diagnose conditions, particularly related to mental health.

TECH: TECH ENABLING SELF- (HEALTH)CARE



A monthly membership to CarePods costs \$99, and gives access to biometric scans, DNA sequencing, and tests for chronic and common conditions.

MEDIA: INFO RELIABILITY QUESTIONED

67%

The percentage of US adults who are unable to differentiate true information from false or misleading information on social sites

With 40% using online information rather than seeking physician care, these new resources come with new risks.

Consumers Take Control of Their Choices By Staying Informed

As the purchase journey changes and consumers take control of their choices, ensure that information about your brand is available and optimized for the modern researcher and potential consumer.

Where supplements and vitamins can be a shady and under-reviewed industry, brands like **Seed** who choose to educate consumers about their product's science and industry before getting into any sales messaging can both help consumers understand product benefits and build longer term trust.



Probiotics are a science.

[Learn More](#)



Health is not just human.

We are a microcosm of Earth's ecology. Our research encompasses ecosystems beyond the human body. We founded SeedLabs to develop novel applications of bacteria to enhance biodiversity and recover ecosystems impacted by human activity.

[Learn About SeedLabs](#)





3

new forms of community

Health is transitioning from being the responsibility of the individual, isolated, to being a space for collective resourcefulness and support

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Trust and
discretion in the
industry and
authorities for
matter of health

THE "MORE" OF 2024

New Forms of
Community
around health
and wellness for
support and
resourcing

New technology and means of communication have jump-started people's ability to connect around health and wellness. This is particularly true amid social and political pressure for increased public health support.

Consumers trust medical authorities, but they also trust and rely on their communities and personal experience to help navigate the healthcare system and new health experiences. To this point, Insider Intelligence found that while doctor's comments/posts (44%) and medical publication posts (36.1%) were the most trusted social media sources for health-related information, comments/posts by friends or family followed close behind (28.8%).

As a result, health & wellness is transitioning from being an individual responsibility to being a place for collective resourcefulness (and resources).

As this integration of community support and opinion continues, there is space to build an ideal version of public and communal health. Marketers must consider how to support, connect, and cultivate this burgeoning space.



Interactivity within Products, Technology, and Health Forge New Communal Paths

PRODUCT: COMMUNITY-ORIENTED BRANDS DRIVE INTENT



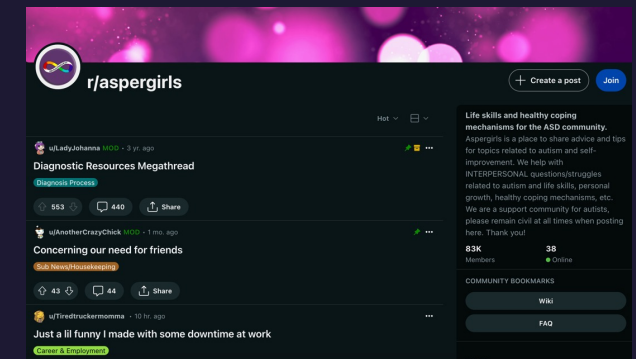
More than 33% of consumers are likely to choose to interact with a wellness business when it is well-known for community-building activities.

TECH: HEALTH WEARABLES BUILD COMMUNITY

77%

The percentage of Gen Z athletes that say they feel more connected to others when seeing their friend's or family's activities on Strava.

MEDIA: HEALTH CONDITION- BASED COMMUNITIES



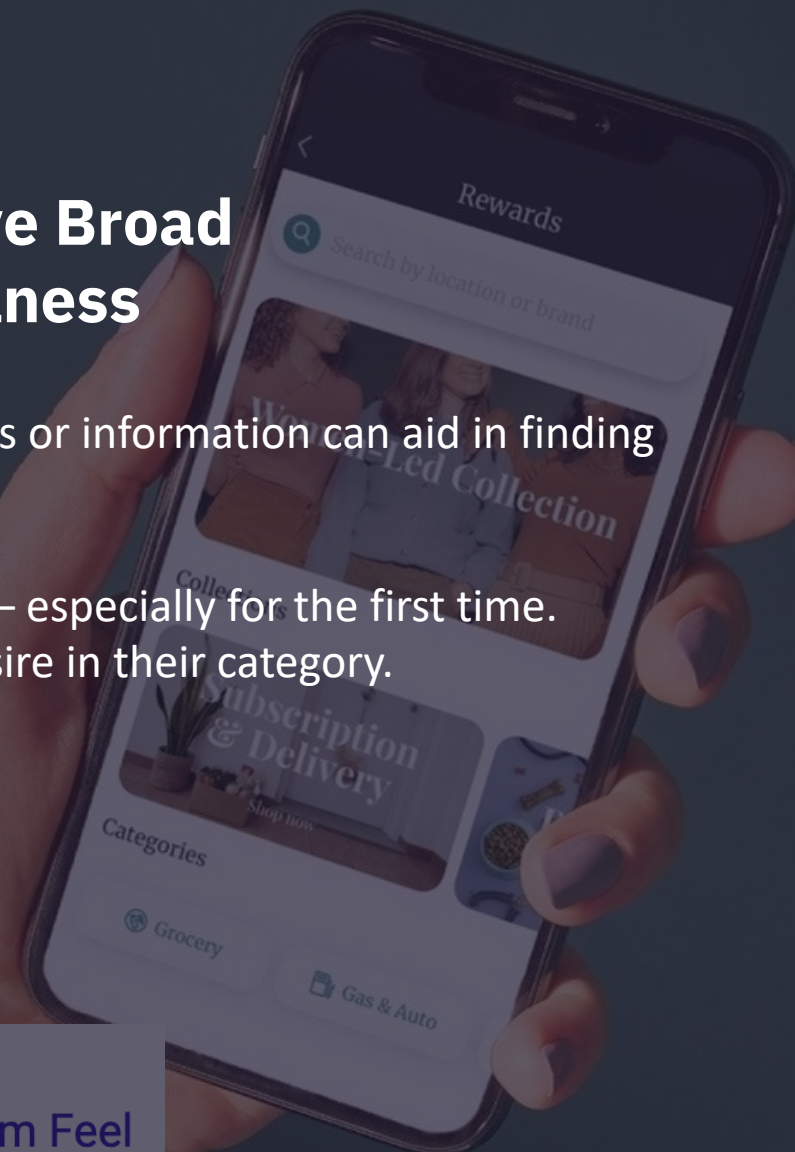
ADHDers, Girls with Autism Spectrum Disorder, and more, are finding community online – particularly on video-based platforms like TikTok and YouTube, and forum platforms like Reddit.

Put your money
where women are

Using Communities to Improve Broad Elements of Financial Wellness

Determining which communities may be seeking out different services or information can aid in finding consumer tensions/needs and figuring out brand ways-in.

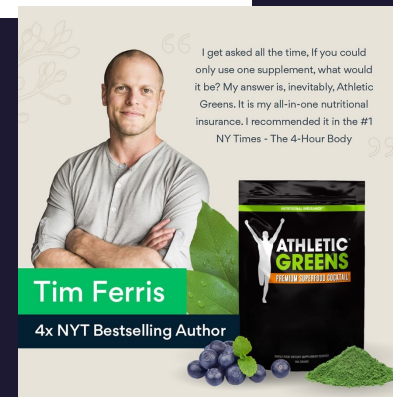
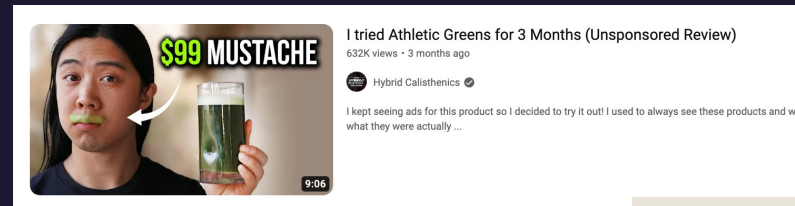
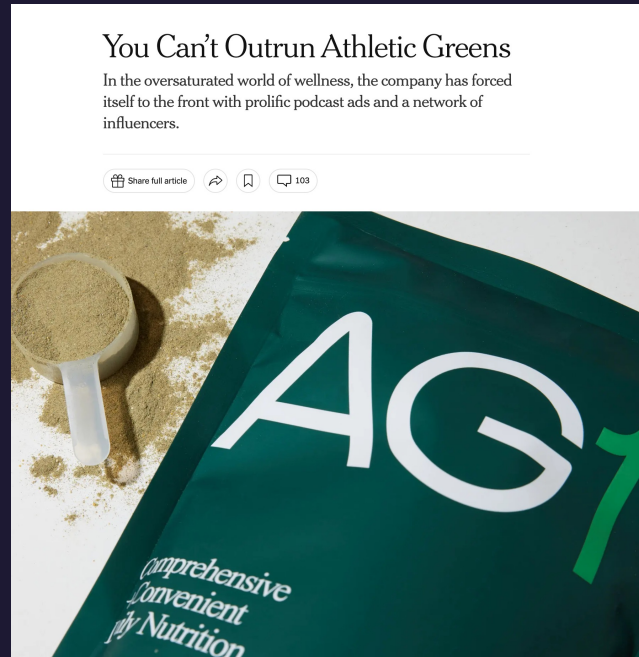
Women seek out the advice of fellow women when looking to invest – especially for the first time. Brands like **Ellevest** leans into this community- and identity-based desire in their category.



 Ellevest

Survey: 86% of Women Say Investing Makes Them Feel Powerful

Brand Communities Accelerate Growth



Second and third-party connections to different brands and services are more likely to peak interest, as community spreads word-of-mouth more quickly. Consider extensions of targeting within physical communities or interpersonal connections.

Athletic Greens relied upon influencer placement and PR packages to spread word-of-mouth most quickly at their launch, and then as consumers fell in love with the brand, encourage evangelizing behavior like sharing the product and how it's incorporated into their routine.



4

value experience

Consumers are looking beyond traditional displays of Value and setting new expectations around how they experience products and services, considering factors like convenience, accessibility, and ease

THE "PRE" OF 2023

Increased emphasis on how to extract value from brands, products and services

THE "MORE" OF 2024

The **Value Experience** takes convenience and accessibility into consideration

Economic indicators are strong, but for the first time in history, consumer sentiment does not match the leading indicators. As a result, consumers are looking beyond Value, finding new proxies when former plus-ups like coverage and quality are now considered table stakes.

In this vein, *each person has a new proxy for value – adjusting what they're looking for from brands and products based on these adjusted priorities.*

Brands are increasingly emphasizing benefits that encompass the Value Experience.



Interactivity within Products, Technology, and Health Forge New Communal Paths

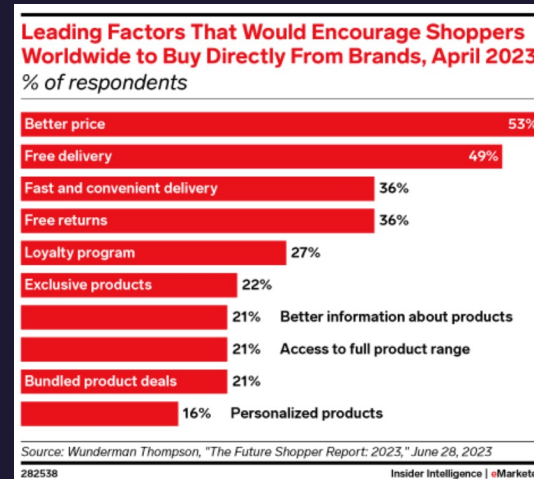
MACRO UNCERTAINTY: INACCURATE CONSUMER PERCEPTION OF ECONOMY

80%

The percentage of voters in six swing states who said the economy was fair or poor

Inflation has slowed, wages are up, unemployment is down, and job satisfaction is up. All reflect a stronger economic outlook, but the perception is still poor.

MULTIFACETED BRANDS: CONSUMERS LOOK AT COST, SPEED, EASE, AND REWARDS



Better prices and free delivery are top factors that encourage purchase are followed closely by convenience-related factors, like delivery and returns. Rewards like loyalty programs and exclusivity are also highly regarded.

EMOTIONAL PURCHASE: DOOM SPENDING OVERCOMES SAVING

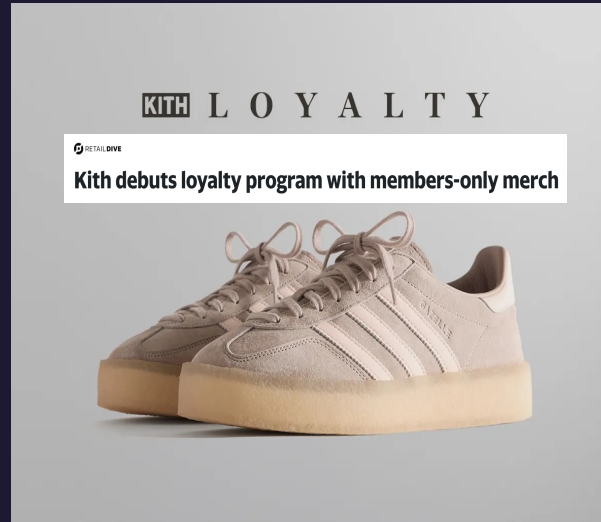
27%

The percentage of Americans who have spent and shopped to cope with stress

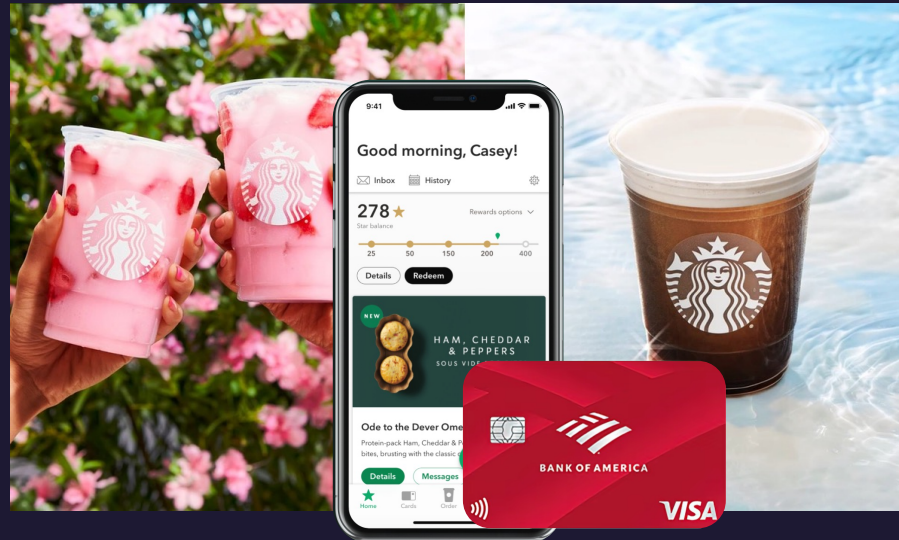
Despite the stressful perceptions of the economy, many consumers are using shopping as a way to cope with their economic anxieties.

Value is Tied to Loyalty Incentives and Exclusivity

With budgets stretching and purse strings tightening, ensure that you are aligning your audience targeting and associated messaging with need-states, understanding that few consumers will have the patience – or the dollars – for goods or services that feel unnecessary.



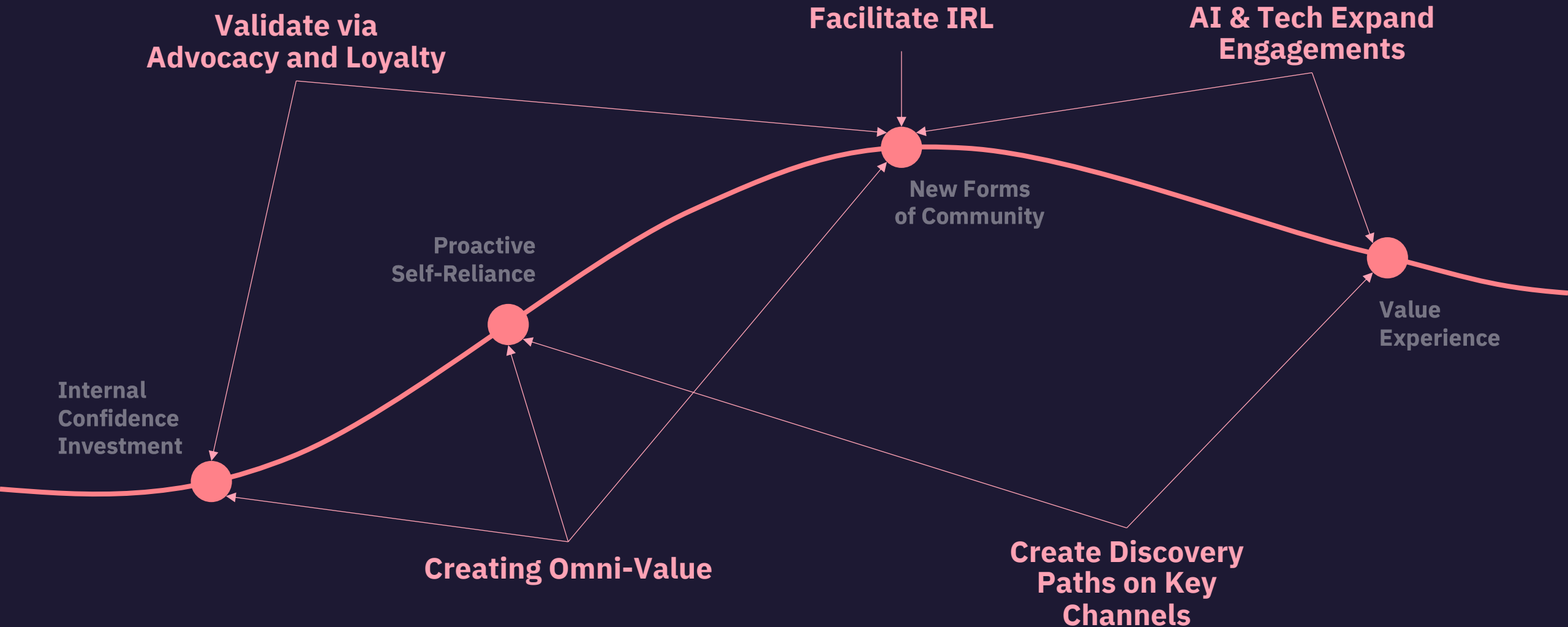
Kith uses its loyalty program to add more value to purchases and entice spend. Through purchases, contests, events, and store visits shoppers can earn points to get members-only merch, early access to products, in-store line priority, and VIP invitations to Kith events.



When cutting little spends are top of mind as wallets tighten, brands like **Starbucks** look to build loyalty programs and partnerships that prioritize benefit for the consumers – like their double cash-back with Bank of America, or their double loyalty points with Delta.

implications

We Identified Tangible Implications that Impact Plans, Platforms, and Partners Across the Navigation Journey



Validate via Advocacy and Loyalty

Tap into the consumer “end-state” after they’ve successfully navigated external confidence. **Create post-usage pride and cultivate a community of advocates** that can be leveraged for insights and activation.



CRM

OPD – NPS,
new product
receptivitySocial
Influencers

Create Omni-Value

Meet increasingly complex consumer needs states throughout all brand interactions via tech, nudges, and owned pathways that **expand from valuable product to valuable experience**. This means AR, new CTA’s/landing pages, price bundling, frictionless purchase pathways



- SEO Insights/
Strategy
- Non-Branded SEM

 Meta

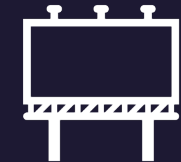
 TikTok

Facilitate IRL

As consumers continue to crave connection and companionship through niche communities, **facilitate or sponsor meet-ups of like-minded individuals** or through influencer affiliations



Influencers



Experiential



 Meta

 TikTok

Create Discovery Paths on Key Channels

Expand our presence to **capitalize on the increasing search/info-seeking mindset**. Leverage these behavioral insights to inform targeting, and to create ideal owned content pathways

The TikTok logo, featuring a white musical note icon on the left and the word "TikTok" in a bold, white, sans-serif font on the right.

Discord

Expand AI & Tech Engagements

Retain customers, identify new and niche audiences ripe for conversion, experiences with **data and tech that reveal new outlets for targeting and messaging** in a cookieless world



Display &
Contextual
partners

The logos for Meta and TikTok. The Meta logo is a blue infinity symbol followed by the word "Meta" in white. The TikTok logo is a white musical note icon followed by the word "TikTok" in white.

Thank You.

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