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# Beauty, Health & Wellness Futures 2023

# Introduction

In a post-Covid era, the worlds of beauty, health and wellness continue to be democratised as solutions move into the hands and the homes of the consumer, with sophisticated products and services leading the way

Democratisation, however, doesn't always equate to a reduction in quality or efficacy – as we have witnessed in the past. 'In the highly saturated markets of beauty and wellness, brands that demonstrate the ability to adapt and progress are taking centre stage,' says Olivia Houghton, deputy creative foresight editor and Beauty, Health & Wellness lead at The Future Laboratory. 'Today's stand-outs aren't necessarily the most aesthetic or approachable brands, but the ones rooted in quality, exploration, expertise and evidence.'

The beauty, health and wellness sectors are developing more synchronised solutions than ever before. Off the back of the pandemic, beauty brands are taking cues from healthcare to push science-backed, data-driven and expert-led approaches to product innovations that go beyond the conventional. With the climate crisis and resource scarcity front of mind for both businesses and consumers, innovative brands are swapping land-grown for lab-grown ingredients and experimenting with the ability to develop sustainable yet more sophisticated formulas.

Innovative progression on such a scale is becoming achievable with the right financial backing. Some of the beauty industry's most notable mergers and acquisitions have taken place in 2022–2023, from French personal care company **L'Oréal** acquiring Australian luxury cosmetics brand **Aesop** to **Estée Lauder** investing in UK-based skincare brand **Haeckels**. Charlie Vickery, managing director of Haeckels, says in a statement: 'Estée Lauder Companies understands what we do and the love we have for it with a shared goal to pioneer and disrupt the beauty industry. This minority investment provides us with the freedom to continue with our vision and purpose.'

Alongside the conversation about business development and growth, there is also a narrative emerging around life optimisation and extension that is fast gathering pace and questioning how people can live better and longer lives. This, too, is driven by science and technological advances that are being filtered to consumer level in the form of accredited and accessible long-life products and services. Cue **Longevity Lifestyles**, a macrotrend that helps brands better understand what role care plays in human maintenance, durability and endurance.

But first, we introduce a set of market trends that provide an overview of the industry over the past year – from Chameleon Cosmetics meeting the needs of shifting identities to Next-gen R&D Labs that are disrupting the manufacturing industry.



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Cover: AI imagery by **The Future Laboratory**, UK



Sammanlänkad by **IKEA** and **Little Sun**, Sweden



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# Trends Rising

From temperature-reactive cosmetics and multi-sensory fragrance experiences to health-first homes, these trends demonstrate how the industry is driving new definitions of identity, curiosity and fulfilment





## Chameleon Cosmetics

As our digital identities shape-shift, innovators are inventing cutting-edge formulas that react to temperature, light and body chemistry



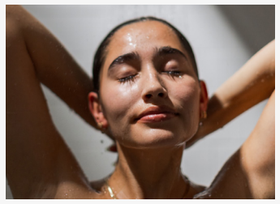
## Tech-powered Perimenopause

The femtech industry is developing AI-driven solutions that will empower individuals as they approach the perimenopause



## Multi-domesticity

Over the next decade, our homes will evolve into domestic spaces and adapt to new health-focused requirements



## Purified Beauty

A new wave of brands are addressing the clean water crisis with the launch of alternative hygiene systems



## Synaesthesia Scents

Olfactory-meets-auditory experiences are providing people with a physical and psychological grounding as an antidote to hyper-connectivity



## Next-gen R&D Labs

A new generation of R&D labs are emerging to meet consumers' expectations on product quality while supporting underserved communities

**What are Trends Rising?**

Trends Rising are the nascent trends forecast to grow across the beauty, health and wellness sector in the next one to three years. These trends are global in their reach and focus on consumer experiences or business operations

Colour Alchemy by **THE UNSEEN Beauty**, UK

# Chameleon Cosmetics

To keep up with our ever-shifting and increasingly phygital identities, beauty innovators and consumers are thinking about how beauty products can behave in different environments, especially when interacting with technology.

**Glisten Cosmetics**, a UK-based independent brand specialising in flamboyantly bright eye products including eyeliners, eyeshadows and eye glitters, has recently gained popularity on social media platform **TikTok**.

Influencers are experimenting with its colourful range of products, testing to see how the brand's vivid formulas look on camera and how they react to digital filters.

Perceiving beauty as a material that sits between our inside and outside worlds, designer Lauren Bowker founded **The Unseen**. The brand's Spectra cosmetics line features reflective technology that responds to flash, and its partnership with **Schwarzkopf** led to the launch of the world's first holographic temporary hair dye. The Colour Alchemy line contains thousands of micro-prisms that expand and contract with temperature, allowing the dye to react in real time to heat and sunlight.

The potential for our bodies to interact with cosmetics is boundless. Canadian cannabis brand **Mood Ring** has imagined a product that merges colour-changing technology with art. Its hypothetical Hippy Fingerz nail polish would be designed to react to an individual's THC high and, although speculative, the product is rooted in research that shows the body secretes cannabinoids through the skin.

• *Read more on LS:N Global*



**Womaness** offers menopause-related wellness products curated to users' needs via a digital survey, US

## Tech-powered Perimenopause

Attitudes to perimenopause have shifted from curative to preventative care in recent years and femtech companies are creating tools that help consumers pursue personalised health journeys.

Offering a 360-degree approach to mid-life health management, the **Midday** app provides users with a complete overview of the physical and mental changes that occur as they begin their perimenopausal journeys. It employs advanced algorithms, AI sensor technology and digital therapeutics to track hot flushes, sleep disturbances and other symptoms of hormonal change. When paired with wearables, the app can offer tailored healthcare interventions in real time.

The global femtech market is projected to reach £3bn ($3.8bn, €3.5bn) by the end of 2031, according to Future Market Insights, and at-home hormone testing is set to become more commonplace. **Eli Health** is offering the first at-home device created to give women access to their hormonal data throughout all stages of their life. Its cartridge captures hormone levels from saliva samples and a corresponding smartphone app visualises the collected data. Eli Health then provides users with daily health insights and personalised advice from reputable physicians and the Eli community.

For precise day-to-day monitoring, perimenopausal people can put on **IdentifyHer**'s AI-enabled sensor; after three months, it can understand their symptoms well enough to generate an individualised symptom management plan.

• *Read more on LS:N Global*

# The global femtech market is projected to reach **£3bn** by the end of 2031

*Source: Future Market Insights*





**Inspired Capital**'s New York office, US

## Multi-domesticity

Homes became multi-functional spaces during the pandemic; they were offices, schools, gyms and anything else consumers needed them to be. But now multi-domesticity is being used to help consumers pursue positive health outcomes. This can be seen as an extension of Healthcare 3.0 where consumers are looking to find wellbeing and pursue positive health outcomes outside of traditional healthcare spaces.

An excellent example of a domestic space built with wellness in mind is Nevada's **Life Time Living Green Valley**, a luxurious fitness complex that offers semi-furnished flats for fitness enthusiasts. As well as the gym, pool, spa, pickleball courts and concierge services, residents also have access to weekly meal plans, personal chefs and aestheticians.

As identified in our Work States Futures report, one of the five new states of work is Rejuvenation and Resilience in which rest and renewal are vital. Therefore, workplaces are also being designed to prioritise workers' health. Technology venture fund **Inspired Capital**'s New York office resembles a large living room with sofas, armchairs, stimulating artwork, and multiple surfaces perfect for laptops, cups and glasses. It's a space that offers employees wellbeing at work, recognising that a healthy and relaxed workforce is more productive and creative.

• *Read more on LS:N Global*

Over **half** of Gen Z see comfort as the most fundamental element of home and **44%** say safety is the top priority

*Source: Dazed and Space10*

**Google** and **Map Project Office**'s Little Signals concept explores how haptic design can help its users achieve balance while spending time online at home, UK

## Purified Beauty

Skincare companies are pioneering alternative ‘clean’ hygiene systems to promote healthier beauty regimes. Turning their attention to cleansing as the very first step in beauty routines, the focus is on making water as clean as possible.

By eliminating harmful contaminants like chlorine and heavy metals, US-based **Jolie**’s Filtered Showerhead aims to preserve the natural microbiome of the skin and scalp.

Taking showerhead innovation a step further, British skincare brand **Hello Klean** has created an eco-system of skincare products to be paired with its showerhead filter. Its Purifying Showerhead has a two-step circular filtration process that boosts water pressure by up to two times. The filter removes hard water residue, making its cleaning products such as a nourishing micronutrient wash and clarifying scalp soap more effective at hydrating the skin barrier.

US skincare company **Filterbaby** is also offering an accredited water purifying solution with its PROdermis showerhead, which it claims is the world’s first clinically tested and dermatologist-approved filter. It attaches to bathroom taps and uses Triple Action Filtering to remove chlorine, microplastics, heavy metals and hundreds of what the brand refers to as ‘unregulated chemicals’. By reducing small contaminants found in regular tap water such as algae, rust and microplastics, the filter promises to improve skin moisture, and rejuvenate and improve skin longevity.

• *Read more on LS:N Global*






Left: **Jolie**, US; Above: **Lalique** and **James Turrell**, France and US

## Synaesthesia Scents

Scent is no longer merely an olfactory pleasure but a multi-dimensional experience thanks to creative crossovers by fragrance brands. These new innovations are influenced by synaesthesia and expand an olfactory product’s effect in appealing to other senses, including sound, touch and sight.

**Arpa Studios** is a multi-platform brand founded by perfumer Barnabé Fillion. Its work combines scent, music, architecture and imagery, so that its perfumes become an immersive experience. The brand’s first range of fragrances, which it refers to as ‘sequences’, come in hand-blown, limited-edition glass bottles, each with a unique sonic frequency, sculpture and photograph that convey its sensorial character.

The Japanese practice of Koh-do, which refers to ‘listening’ to incense, has been integrated by US perfume brand **Folie à Plusieurs** into a range of incense sticks. The Co collection sticks are created by Japan’s oldest incense company, **Kungyokudo**, and each pack is sold with a link to download an album to be played while burning the corresponding scent.

Renowned French crystal-maker and perfumer **Lalique** has partnered with American artist James Turrell, known for his immersive light sculptures, to figure out how to link scent with art and art with scent. Their four-year collaboration resulted in the creation of two exclusive fragrances and bottle designs. Range Rider and Purple Sage are housed in artisan-made crystal flaçons featuring architectural prism shapes that artfully diffuse and diffract light.

• *Read more on LS:N Global*

# Some **22%** of global consumers prefer scents that help them to relax to reduce distress and anxiety

*Source: In-Cosmetics Connect*

Botanical Rainbow by **Loewe** positions senses as a stimulus to emotional healing. Photography by **Tyler Mitchell**, Spain



**SULA LABS**, US

## Next-gen R&D Labs

A new generation of R&D labs are shaking up the beauty industry by supporting indie brands which prioritise traditionally underserved beauty consumers.

**Indie Cosmetics Lab (IC Lab)** helps small independent beauty brands break into the big business of beauty. The entrepreneur-focused lab helps brands start, scale up and expand their business. Unlike traditional beauty labs, IC is happy to work on beauty formulas created by non-chemists. It also offers to manufacture products in smaller units and provides flexible payment plans.

A team of women from the Charles Green engineering family created **CG-Labs** in 2019 to disrupt the status quo of beauty manufacturing. The New Jersey-based beauty lab helps independent beauty brands turn their ideas into complete bodies of work using its simplified multiple-step process – from initial contact to out-of-the-door formulation. Some 95% of the products and formulations that the lab produces meet clean beauty standards and are verified by accreditations such as Credo Clean Standard, Clean at Sephora and EWG Verified.

Although Black consumers are visible in the beauty industry, especially in advertising, 22-year-old chemist AJ Addae says they are still ‘vastly underserved in many angles, specifically R&D innovation’. Accordingly, she founded **Sula Labs**, a Los Angeles-based R&D company that aims to modernise the beauty industry by developing skin and personal care products for Black-owned brands and Black consumers.

• *Read more on LS:N Global*

MACROTREND

# Longevity Lifestyles

The health, beauty and wellbeing sectors are embracing longevity as consumers awaken to the possibility of living not only longer, but healthier lives



AI imagery by **The Future Laboratory**, UK



AI imagery by **The Future Laboratory**, UK



Immortality has long been the engine for so much fantasy, so much wishful and wistful thinking in our collective imaginations. From the Epic of Gilgamesh to the endless regenerative powers of Deadpool, popular culture has asked us many times to ponder all the ways that we could live if we never died.

But what do we mean by longevity? The concept of living, if not for ever then for a much longer time, is becoming a possibility. Evolving technologies and advances in science are aiding beauty, health and wellness businesses in building products and services that let consumers live not only longer lives, but better quality lives.

Silicon Valley has had a long-standing preoccupation with death-disrupting technologies. In 2013, **Google** formed biotech lab **Calico** to fund its exploration of the ageing process in mice. **PayPal**'s co-founder Peter Thiel has invested millions in the **Methuselah Foundation**, a not-for-profit organisation that aims to make 90 the new 50 by 2030. **Open AI** co-founder Sam Altman recently financed biotech start-up **Retro Biosciences** to the tune of £144m ($180m, €164m). The start-up's mission is to add 10 years to the healthy human lifespan and it is working on anti-ageing mechanisms in non-human mammals, which it aims to translate into scientific strategies for people.

'Every other industry in the world spends its time avoiding problems, except for healthcare where we wait for the problems to emerge'

*Dr William Kapp, co-founder, Fountain Life*

But the most innovative longevity developments go beyond age-hacking; their focus isn't on length of life but on extending the quality of living, with health, wellness and societal purposes at the core. This concept of longevity is being pursued through rigorous rather than speculative sciences. According to David Sinclair, director of **Harvard Medical School**'s **Paul F Glenn Center for Biology of Aging Research**, some £4bn ($5bn, €4.5bn) has been invested in ageing drug development since 2020 (source: **The Harvard Gazette**).

Covid hypercharged health consciousness into the mainstream, forcing all of us to consider what it means to be healthy and how to maintain health. Accordingly, post-pandemic consumers are living wellness-fuelled existences. They seek wellbeing in all experiences – be that travel, retail or tech. We've seen this in the rise in demand for recuperative hotel stays, or a more democratic access to mental healthcare in shopping spaces, for instance, or how consumers are looking to the metaverse as a place that will help enhance digital health – a **Betterverse**. Consumers' burgeoning interest in longevity can be seen as an extension of a growing desire for wellbeing.

Advances in modern medicine already allow those in industrialised nations to live for longer than previous generations. As shown in an **Our World in Data** study, life expectancy has been rising globally for two centuries, although consumers are not physically healthier. Medical progress has meant increased improvement in treatment of serious diseases such as cancer and heart disease, but most of these diseases are a consequence of older consumers living with illness for longer.

'On average, people spend about 50% of their lives in less-than-good health, including 12% in poor health, and 'this ratio has not changed much in the past 50 years', a **McKinsey Health Institute** report notes.

According to Lucy Goff, founder of wellness tech company **Lyma**, 'pharmaceuticals are helping us survive but not necessarily thrive'. This is an ongoing healthcare frustration noted poignantly by Dr William Kapp, co-founder of preventative healthcare organisation **Fountain Life**. 'Every other industry in the world spends its time avoiding problems, except for healthcare where we wait for the problems to emerge. We only pay our doctor to take care of us after we're broken. We don't pay the doctor to keep us healthy.'

Longevity proposes that ageing should no longer be seen as, or treated with, managed decline. It is a new concept for living and a more progressive way of looking at health and wellness. Businesses and brands can use it to create products that redefine how consumers take care of themselves. It offers consumers new tools to advocate for more progressive beauty, health and wellness outcomes.

Longevity isn't merely an innovation that delays death, but one that optimises life.

# Drivers

A renewed sense of purpose, ever-shifting identities and the rise of self-help and self-care are driving new conversations about health and life expansion





## Restoring Purpose

As the gloom of the past few years recedes, society is recalibrating and people are feeling brighter about the future



## Flat Age Living

The demographic categories that once bound us are no longer definitive; our interests take precedence, as do our shifting identities



## Prevention Providers

Self-care is redefining preventative health, as more people embrace at-home practices and eschew traditional healthcare systems



## Health Disservice

The current lack of body autonomy, due to governmental laws and policies, is restricting consumers' desire for progressive health journeys



## Accredited Claims

Longevity is earning a legitimate status with recent scientific breakthroughs and more media exposure to experts' claims

# Restoring Purpose

Health, safety and financial concerns have been the anxiety-inducing top priorities of people over the past few years. Many are now feeling burnt out by living in accordance with their security needs.

As Tim Jones, head of strategy at global branding agency **Venturethree**, observes: 'We acknowledge that consumers are re-evaluating their relationships with everything – with parents, work, religion, government and institutions. They're so aware of their mortality because of Covid, their resources because of climate change, and it's happening at a time when old institutions can't keep up with the demand.'

As the gloom of the past few years recedes, society is recalibrating and people are feeling brighter about the future. According to a survey conducted by **Ipsos**, optimism is steadying globally, with an average of 65% of respondents saying they feel optimistic that 2023 will be better than 2022. Subsequently, behaviour is now being driven by purpose and curiosity, and the desire to live longer is becoming an attractive concept.

Consumers are also thinking differently about how they live their lives and how they consume. A **Vice Media** survey has revealed that when shopping, 77% of young people globally are pausing to ask themselves 'Do I really need this?' Experiences, products and services must now add value and meaning to their day-to-day lives.

**Global Drivers :** Fragmenting Societies, Climate Crisis and Resource Scarcity

Consumers are seeking kinesis and purpose as a way of moving on from the paralysis of previous years







**Collins** interprets a sense of optimism through its dynamic branding for **Medium**, US

**What are Drivers?**

A global driver, sometimes referred to as a mega-trend or a global force of change, is a fundamental shift and external force that has the potential to reshape the future trajectory of a brand or business. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative

# Flat Age Living

Ageing is changing. Global life expectancy is up, and most consumers expect to live longer today than they would have done 30 years ago – and they consider it a privilege.

According to the World Health Organization, between 2015 and 2050 the proportion of the world's population aged over 60 will nearly double from 12% to 22%. This should encourage society to view ageing more generously and work to make it a less isolating or isolated experience.

There are now more people aged 65 and over in England and Wales than children aged under 15 (source: **The Guardian**). Grandparents are Grandpeers who often share technologies with younger consumers, and are connecting on the same platforms, with corresponding ideals of empathy and positivity.

Moreover, traditional markers of maturity, such as having children or owning homes, are increasingly negotiable. The demographic categories that once bound us are no longer as definitive; our interests take precedence, as do our shifting identities.

'Members of the next-gen audience don't define themselves by how old they are, but by what makes them tick,' Ruby Ktori, creative strategist at creative agency **Amplify**, tells The Future Laboratory. In entertainment, talented women over 60 such as Jennifer Coolidge have become more prolific than they were in their 20s and finding fandom among 15-year-olds. In travel, Baby Boomers are pursuing aspirational existences of exploration and self-expression. We are beginning to understand that the longer we live, the more opportunities we'll have to create lives defined by our desires and chosen purposes.

**Global Driver :** Evolving Demographics

Generational demographic categories are no longer prioritised as consumers increasingly connect through values such as enthusiasm and optimism, rather than age grouping







Left: Senior influencer **Iris Apfel** collaborates with **Ruggable** on its latest rug collection, US; Above: **Neko Health**, Sweden

# Prevention Providers

Self-care is more than just a buzzword – it's redefining preventative health. We've seen people embrace at-home practices, assert control over their bodies and eschew traditional healthcare systems.

Consumers are relying heavily on technology to turn their homes into health-conscious hubs that understand how to anticipate their needs. Digital tools and sensors that offer feedback loops on daily living, including smart mirrors that prompt small daily changes in diet or lifestyle, are becoming part of the furniture. Wearable devices offering seamless healthcare monitoring are becoming more intelligent, with the global wearable technology market estimated to reach £227bn ($283bn, €258bn) in 2027 (source: **eCommerceNews**).

Consumers are tending towards self-preservation; harnessing all available tools to take care of themselves.

Dr William Kapp, CEO of personal healthcare manager **Fountain Life**, tells The Future Laboratory that there is great social and economic good in focusing healthcare on prevention. 'In the US about 97% is spent on what I would call sick care medicine, or symptomatic care. And we spend about 3% on detecting those problems before they occur. Yet we know that by detecting things early [while you're still asymptomatic] we lower the cost of healthcare by about 70%.'

In pursuing prevention, consumers are inadvertently pursuing longevity, changing the role of provider, the power of the patient and redefining healthcare outcomes.

**Global Drivers :** Evolving Demographics, Accelerating Technologies

Consumers are increasingly self-reliant and habitually resort to self-care

# The global wearable technology market is expected to reach **$283bn** in 2027

*Source: eCommerceNews*



**Neko Health** is a health tech company that employs preventative measures and early detection to enable people to live longer, Sweden

A majority of Americans disapprove of the US Supreme Court's 2022 overturning of Roe v Wade, with **62%** saying abortion should be legal in all or most cases

*Source: Pew Research Center*




**Dame** has collaborated with **Mischief at No Fixed Address** to launch a politically charged sex toy that will help fund access to abortion care, US

## Health Disservice

While healthcare is increasingly shifting into the hands of consumers, there is still a lack of autonomy due to government laws and policies. The current barriers are restricting consumers' desires for progressive health journeys.

In 2022, the US Supreme Court overturned the constitutional right to an abortion, reversing Roe v Wade, a law that protected a pregnant person's liberty to choose to have an abortion. In early 2023, the British government rejected a proposal to make menopause a protected characteristic under the Equality Act, despite a poll revealing that 62% of Britons favour the idea (source: **YouGov**).

What administrations fail to realise is that this exertion of control harms consumers' morale and has the potential to damage economies. A **Global Wellness Institute** report proposes that sickness is linked to economic decline. 'Unwellness shrinks the labour force while simultaneously hurting productivity – the worst possible combination for long-term economic growth.'

Fortunately, brands have begun to understand the value of providing more comprehensive and in-depth care for consumers. They are stepping up civically to support consumers in chosen health outcomes.

American e-commerce giant **Amazon** announced it will reimburse staff in the US by up to £3,200 ($4,000, €3,650) in travel costs for abortions, and UK-based fintech company **ClearScore** offers a menopause workplace pledge and enhanced policy for the loss of a baby. Beyond rights, the next step for brands and businesses is to ensure that services and products that improve the quality and span of life are both accessible and attainable.

**Global Driver :** Fragmenting Societies

Consumers' trust in government institutions is low and policy restrictions prevent consumers from pursuing desired healthcare outcomes

‘There have been biomedical breakthroughs that elevated the anti-ageing field from an exotic area to a very rigorous discipline’

*Steve Horvath, professor, University of California*






Left: Photography by **Lucas Vasques**, Brazil; Above: **Motherlabs** is an accelerator for early-stage science, technology and innovation businesses. Branding by **DNCO**, UK

## Accredited Claims

The field of ageing research was once the domain of science fiction and, supposedly, speculative.

When experts made claims in the real world, they were considered too outlandish to gain mainstream acceptance. One example was in 2008, when British mathematician and ageing scientist Aubrey de Grey announced that the first human to live for 1,000 years had probably already been born. But with recent breakthroughs in the field of ageing and more media exposure to experts who make sustainable claims about how science can extend life, today’s **Accredited Beauty** consumers are satisfied with longevity’s viability.

As professor Steve Horvath at the University of California, Los Angeles, observes: ‘There have been biomedical breakthroughs that elevated the anti-ageing field from a little bit of an exotic area that attracted non-rigorous science and extraordinary claims to a very rigorous discipline.’ This includes the achievements of the **Babraham Institute** in Cambridge, UK, which recently restored a 53-year-old woman’s skin cells to match the profile of cells 30 years younger.

Consider the promising strides made with generic diabetes drug metformin by Nir Barzilai, founding director at the New York-based **Institute for Aging Research** at the **Albert Einstein College of Medicine**, whose hypothesis suggests that the drug can extend human lifespan by years. Following a study on patients in the UK, Barzilai is planning a flagship trial using the cheap, potentially life-extending medicine.

Accredited discourse has been furthered by the first ever longevity summit, held in Lisbon in May 2023. There scientists, researchers and members of the medical community gathered to explore challenges and share tangible innovations in longevity therapies.

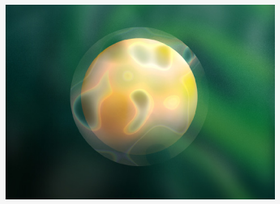
**Global Drivers :** Accelerating Technologies, Urbanised World

Beauty, health and wellness brands know consumers want products that dazzle by using advanced tech and emerging science

# Insight

**Beauty, health and wellness brands are turning to science and advanced technologies to create reliable, accessible and nurturing longevity products and services**





## Restoring Purpose

Interest in cell care has trickled down to the beauty industry and become one of the more accessible ways to sell longevity



## Supercharging Prevention

Preventative health and wellness practices that aid longevity are being given a science-focused boost



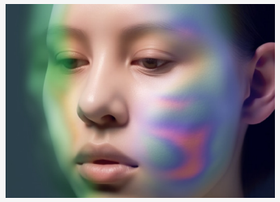
## Longevity Clinics

The wellness tourism industry is filtering high-level longevity practices into comforting, hospitable environments



## Blue-trition

Brands are translating nutrition knowledge from the world's longest living cultures into modern diets



## Hacking Age-sthetics

As new technologies emerge that enable us to live to 100 plus, the beauty industry has some interesting new questions to face



## Senior Rebirth

The use of psychedelics to explore mental health and age-related ailments is changing the biopharma sector




**What is Insight?**

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2026. In this report, they are represented as microtrends that sit across different industries but feed into the umbrella macrotrend

Above: **One Skin**, US; Right: **Merijn Hos**'s depiction of **Glossier**'s cleansing product, The Netherlands

## Cell Care

Old or senescent cells are one of the six biological causes of ageing, according to a recent article published by **Sky News**, and have become a prominent subject of investigation in healthcare research.

In 2016, a consortium of health research organisations, including the **Broad Institute** and the **Wellcome Trust**, launched the **Human Cell Atlas** project with the aim of mapping every cell type in the human body to transform our knowledge of biology and take our understanding of cells beneath the surface.

Accordingly, corporations have begun investing heavily in cell research. In 2022, US-based global management company **McKinsey & Co** opened a Digital Capability Center designed to help clients build capabilities in cell and gene therapy technology, with promising results. 'Five years ago, these [cell and gene] treatments were really just ideas being tested in very small clinical trials,' says Katie Kelleher, a partner at McKinsey & Co who helped establish the centre. 'Now they are the fastest-growing area in therapeutics.'

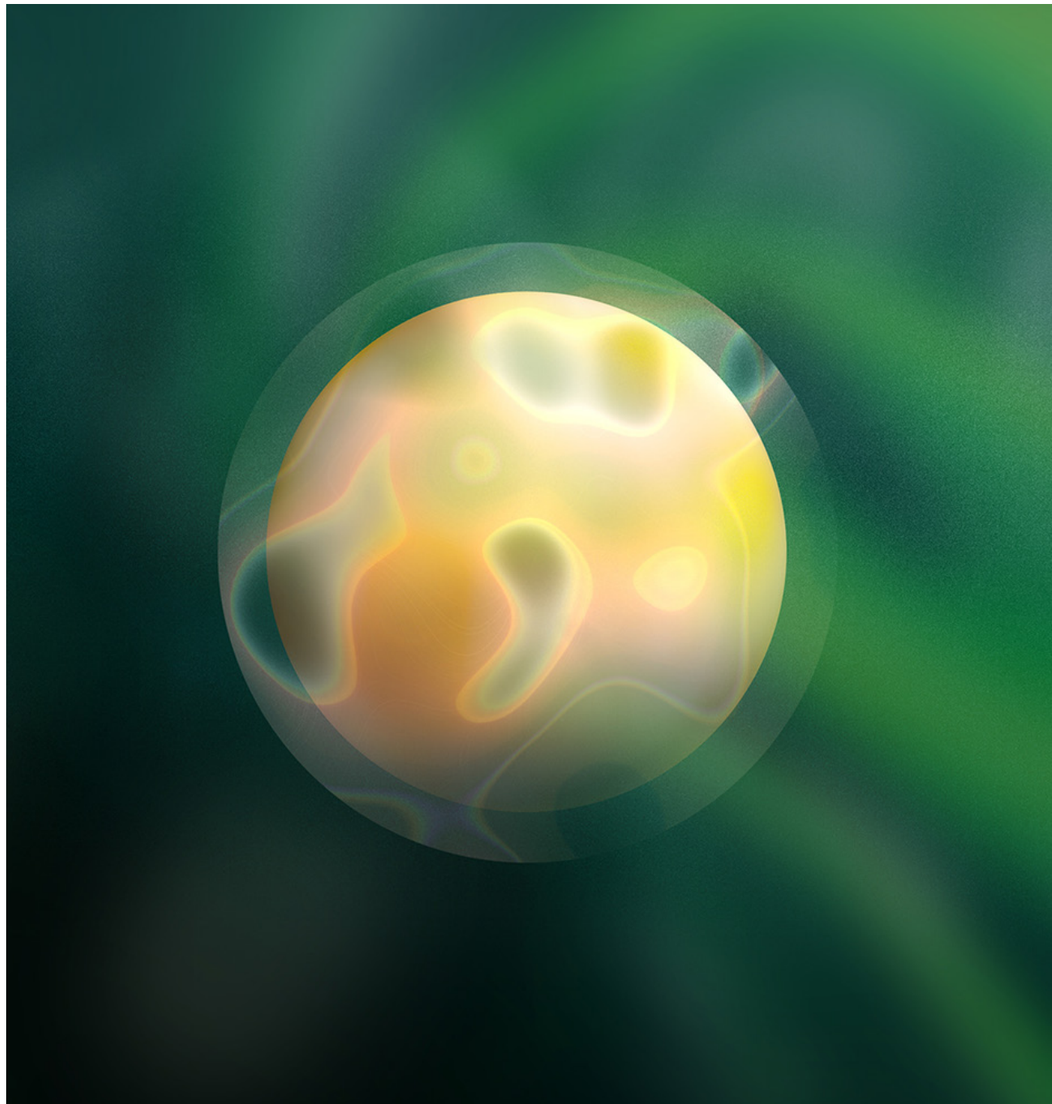
This interest in cells has trickled down to the beauty industry and cell care has become one of the more accessible ways to sell longevity.

Nicotinamide adenine dinucleotide (NAD+), a coenzyme that declines with ageing according to **The Sinclair Lab**, is being explored by skincare company **Naderma** in its new line of preventative ageing products. As an active ingredient, the molecule plays a crucial role in mitochondrial health and delivers energy to the body's cells.

**Element Eight**, a science-backed skincare brand specialising in oxygen-fuelled beauty products, is also exploring how to deliver nutrients to cells. Its proprietary technology was first developed for spinal surgery. Described as a hyperbaric chamber for the skin, the products contain a blend of topically applied oxygen carriers that mimic the function of haemoglobin in the blood and release directly into the skin cell, healing and accelerating cellular metabolism.

Cell care, however, isn't always centred around supplementing nutrition. It also eradicates old cells entirely and allows room for new ones to grow. San Franciscan skincare brand **One Skin**'s slow-release products are designed to eliminate 40–50% of senescent cells, while Switzerland-based **Timeline**'s Mitopure ingredient unlocks a precise dose of Urolithin A, a molecule that stimulates a recycling process inside our cells.

> 'Five years ago, cell and gene treatments were ideas being tested in small clinical trials. Now they are the fastest-growing area in therapeutics'
>
> *Katie Kelleher, partner, McKinsey & Co*






**LYMA,** UK

## Supercharging Prevention

Preventative health and wellness practices that aid longevity are being given a science-focused boost.

Californian health technology firm **Illumina** is transforming the field of genome sequencing and claims that its new NovaSeq X technology is capable of sequencing about 20,000 genomes annually, far more than the 7,500 genomes it processes now. This breakthrough is expected to make the longevity practice of early detection of diseases and the development of genetically tailored medications more available and affordable.

These cutting-edge technical solutions are also becoming more commercially accessible, allowing consumers to take control of their longevity goals from the comfort of their own homes.

**111Skin**'s Theorem Repair Serum NAC Y2 was originally launched back in 2004 by plastic surgeon Dr Yannis Alexandrides to heal the skin of post-operative patients. The formula, which has been tested in space, contains NAC, or N-acetylcysteine, an amino acid that triggers the production of glutathione to help preserve skin and halt the ageing process at a cellular level. The skincare brand recently relaunched the product with an upgraded formula that is four times stronger than its predecessor.

US skincare brand **Noble Panacea** harnesses Sir Fraser Stoddart's Nobel Prize-winning Organic Super Molecular Vessel (OSMV) technology for accessible skincare. It is designed to deliver active ingredients precisely into skin cells. The brand's recent Elemental Collection was developed to prime the skin for seamless penetration of the OSMV-housed active ingredients, amplifying the potency of its products.

UK wellness tech company **Lyma** is creating an anti-ageing eco-system with its science-backed solutions. It recently launched two products to turbocharge its pioneering home laser device, turning it into more than just a skin rejuvenation tool. Oxygen Mist contains 100% active stabilised oxygen (ASO), and floods the skin with antioxidants needed for cellular production, blood flow and moisture retention. Oxygen Glide uses patented glycerin and hyaluronic acid to deliver clinically proven deep moisturisation, increased collagen and improved skin firmness. This technology reaches the dermis and fibroblasts, and is 100 times more effective than a standard oxygen facial, according to Lyma.



**Modern Age** is a longevity-focused clinic in New York offering age prevention services, US

# The wellness tourism industry is projected to reach **$1.3 trillion** by 2025

*Source: Global Wellness Institute*

## Longevity Clinics

The burgeoning longevity market is ripe for a more user-friendly repositioning. To take root, consumers need brands and businesses to create reassuring narratives around longevity, and present these currently unattainable tools and benefits in comforting ways.

Health and wellness hospitality experiences are soft entries into longevity practices, with an obvious appeal for consumers as the wellness tourism is currently booming; the industry is projected to reach £1 trillion ($1.3 trillion, €1.2 trillion) by 2025 (source: **Global Wellness Institute**). Wellness hospitality brand **Six Senses**, in partnership with biotech company **Orgenesis**, is offering to make longevity feel like a holiday with its RoseBar collaboration. Its wellness programme in Ibiza offers bespoke diagnosis and anti-ageing treatments, such as stem cell manipulation and pulsed electromagnetic-field therapy.

**Sheba Medical Center** in Tel Aviv, Israel, is preparing to open a dedicated longevity centre in 2023, making it the first in the world to offer such services to patients. The centre will cater exclusively for patients aged 40 and over, and their health data will be collected for 3–4 weeks before a longevity course of action is recommended.

Also opening in 2023 is Zurich-based **Liv Lounge**, Europe's first longevity clinic, targeting upper middle-class patrons with its monthly subscription fee of £404 ($507, €460). 'Our services are premium,' the clinic's leading medic Elisabeth Roider told **Sifted**. Her background is in medicine but she was drawn into the longevity industry after being disappointed by inefficiencies in healthcare services. 'But it's not our ambition to be luxurious. Our vision is to switch the general mindset… so that preventative medicine is made more accessible.'

For society at large to benefit from the gains in longevity advances, the associated and ever-evolving array of products and services must become accessible – both financially and globally. Businesses and brands must build philosophies of inclusivity around their longevity tools. Look to New York wellness and fitness service **Fountain Life**, which aims to make consumers 'CEOs of their health'. Its clinics around the world, including in Toronto, New Delhi and Dubai, use advanced technology and artificial intelligence to detect illnesses early in a bid to reduce healthcare costs by up to 70%.





# Searches for ‘Longevity Centre’ have grown **85%** year on year

*Source: Google Keyword Planner (February 2022–January 2023, Global English: Yearly Growth Percentage and Monthly Average Searches)*

Photography by **Darlene Alderson**

# Blue-trition

**Time** magazine has reported that more than half of the global population – that's 51%, or over 4bn people – will be obese by 2035 and that the total cost of treating illnesses related to obesity will be an estimated £3.2 trillion ($4 trillion, €3.6 trillion) per year.

Food's medicinal role plays an important part in living longer. While consumers are aware of the recommended five portions of fruit and vegetables a day, and that ingesting too many processed foods is bad for their health, the knowledge that would connect their diets to longevity is less accessible.

American author Dan Buettner has spent years researching the foods that help consumers live longer. Building on Blue Zone work pioneered by Giovanni Pes and Michel Poulain in Sardinia, Buettner identified five global Blue Zones, areas where people consistently reach age 100 due to a combination of lifestyle habits and nutrition. For his most recent cookbook, The Blue Zones American Kitchen: 100 Recipes to Live to 100, he went in search of long-lost American longevity diets, reviving plant-based recipes from Hmong elders in Minnesota, Quakers in New England and Gullah Geechee in Louisiana.

The challenge for businesses and brands will be to achieve a balance between using the acumen of marginalised groups to serve the majority, and giving underprivileged people the same access to longevity as those in more privileged groups.

'In order to make healthy eating mainstream, we need to make it applicable and reachable for everyone,' says Dr Suzannah Bozzone, who is reshaping her city of Chattanooga, Tennessee, into a hub for healthy eating. Bozzone is running a Blue Zone-fuelled programme that teaches African American and Latinx teenagers to grow, then cook, whole foods and plant-based foods in the flavours of their communities. The meals they make are sent to heart failure discharge patients in the hope of reducing their prospects of re-admission to hospital. The project aims to show how Blue Zone eating can be a tool for community-building, education and practical longevity.

For long-term and practical longevity eating, consumers will be drawn to platforms such as UK-based **Welleasy**, self-styled as Whole Foods with a **Costco** membership model. Built by its co-founders to prioritise giving consumers fresh food at accessible prices, users pay £48 ($60, €54) a year to access over 4,000 products at up to 35% off the retail value.





Left: Photography by **Zen Chung**; Above: Photography by **RF_Studio**, South Africa

More than half of the global population – over **4bn** people – will be obese by 2035

*Source: World Obesity Federation*



AI imagery by **The Future Laboratory**, UK



# Hacking Age-sthetics

In recent years, the aesthetics of ageing, particularly for women, have become more visible and desirable. **The Wall Street Journal** recently reported a 'sky-high demand for older models in their 60s, 70s, 80s and even 90s'. We've grown to embrace the aesthetics of ageing – with grey hair and the coastal grandmother look trending on **TikTok**.

But with people living longer, and potentially surpassing their 150th birthday, ageing aesthetics may have an expiry date. Some natural ageing processes start as early as your mid-20s, so by the time you reach mid-life or early elderhood, there may be a desire for an aesthetic change.

'If you can live to 120 and look like you do when you're 40 or 50, what does that do?' Dr William Kapp, co-founder of **Fountain Life**, hypothetically asks the beauty industry.

Los Angeles-based hair wellness brand **Vegamour** has launched an Ageless range containing an anti-grey serum. The product's formula uses a blend of vitamins B3, B5, B6 and E to delay grey hair and reduce the appearance of grey on new hair growth.

Elsewhere, brands are tackling other sensory markers of ageing. A recent study by Japanese cosmetics company **Shiseido** revealed that the chemical compound nonenal, also known as 'old people's smell', can cause skin-thinning. This led its researchers to experiment with fragrances that could suppress nonenal.

This has opened up a new perspective and category of anti-ageing products, with beauty companies looking at opportunities to deodour-age consumers.

Spanish biotech firm **LipoTrue** developed N_llscent, a proprietary ingredient that neutralises the odours that tend to become more potent after the age of 30, such as those from feet, armpits, neck and belly. According to the brand, everyone has a unique odour print that becomes more noticeable with age.

‘If you can live to 120 and look like you do when you’re 40 or 50, what does that do?’

*Dr William Kapp, co-founder, Fountain Life*

**Tiny Associates**, Sweden

# Senior Rebirth

Mental health matters hugely for human longevity. New research by the **European Psychiatric Association** has found that people suffering from a range of psychiatric conditions carry markers in their blood indicating that their biological age is older than their chronological age.

And while mental illness is speeding up the ageing process, it is also prevalent in those in their senior years. Although older adults comprise just 12% of the US population, they account for 18% of suicides (source: **National Council of Aging**).

For longer living to remain appealing, consumers must feel psychologically equipped, emotionally motivated and inspired to maintain a broad outlook on the ever-changing world.

Enter psychedelics. The use of psychedelics to explore mental health and age-related ailments is changing the biopharma sector, with mind-altering medicines emerging as a distinct branch of longevity healthcare.

The **Longevity Science Foundation** has partnered with **Ageing Research at King's** to run a joint event that highlights the potential of psychedelic applications for mental health and longevity. Researchers at King's College London believe more accessible approaches to mental health treatments will unlock understanding of other ageing-related diseases like Alzheimer's and Parkinson's. The **National University of Singapore** has also been exploring similar theories. Its Biochemistry department found that residents over the age of 60 who consumed more than two standard portions of mushrooms each week were 50% less likely to develop mild cognitive impairment than those who consumed mushrooms less than once per week.

When American author and Baby Boomer Joe Dolce spoke to **Double Blind**, a psychedelic-focused publication, he said he turned himself into a hallucinogenic test case because he was afraid of turning into an 'ossified old man'. The author of Brave New Weed, a non-fiction book on the consumption and enjoyment of cannabis, began consuming psychedelics, and a year into his experiment he reported 'a renewed sense of motivation'. Says Dolce: 'It wasn't energy. It wasn't feeling buzzy. Just a renewed appetite to get up and face every day.'






Left: Psychedelic exploration in **Semi Permanent**'s 20 Years Forward & Back book, Australia; Above: **Beck**'s Brewery has launched a limited-edition beer for those over 70, Brazil

In the UK, depression affects about **22%** of men and **28%** of women aged 65 and over

*Source: Mental Health Foundation*

# Foresight

In the next decade, longevity practices will be accelerated by new, intelligent technologies, and consumer attitudes to longevity – and death – will change as the prospect of immortality is explored further





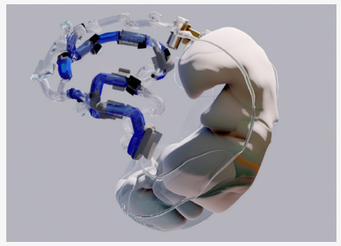
## Internal Authority

Consumers will begin to demand tools to assess specific internal biomarkers and will routinely use data to achieve their longevity goals




## AI Reliance

As AI becomes more commonplace in our lives, it will be a routine part of our healthcare treatments



## Instant Age Relief

While research to reduce the symptoms of ageing continues, singular medical advances could be used to resolve isolated age-related ailments in an instant



## Optional Death

We explore how, in the far future, death could be a choice, and one far less painful and negative

Some **45%** of wearable-owning consumers say they enjoy looking at their data

*Source: GWI*

**What is Foresight?**

Foresights examine speculative scenarios 5–10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments

**Builders Club** for **Helena Rubinstein**'s Powercell Skinmunity campaign, UK

## Internal Authority

As wearables have grown in specificity, popularity and accessibility, we've become more quantified individuals, tracking our bodies to monitor health. According to a study by **GWI**, 45% of wearable-owning consumers say they enjoy looking at the data, highlighting their need for more information.

In the near future, consumers will begin to demand tools to assess ever-more specific internal biomarkers and will routinely use the data they collect to achieve their longevity goals.

In 2022, venture capitalist Bryan Johnson launched **Project Blueprint** to measure and maximally reverse his biological age through the meticulous tracking of over 70 of his organs. The only person to have attempted biological reversal of this kind, Johnson claims the project has resulted in an epigenetic age reversal of 5.1 years and that he now has the heart of a 37-year-old. He explains on his blog: 'This has given my heart, liver, kidneys and all other organs and biological processes of my body an independent voice whose authority surpasses my conscious mind.'

While full-body age reversal might seem like a far-fetched concept, **Tally Health**, founded by venture capitalist Whitney Casey and professor David Sinclair, is providing an accessible approach to quantified longevity. Consumers provide the biotech start-up with a cheek swab to determine their biological age. This swap can be done every three months, functioning as a regular health check-up. Tally's subscription-based platform then creates personalised diet, fitness and mental health recommendations to target a consumer's ageing challenges.



Neural Sleeve by **Cionic** and **Fuseproject**, US

## AI Reliance

As AI becomes more commonplace in our lives, it will be a routine part of our healthcare treatments. The global AI healthcare market is predicted to be worth almost £150bn ($188bn, €170bn) by 2030, according to **Statista**, and we will begin to rely on the new technology to help us achieve and maintain longevity goals.

In its mission to extend healthy life, **BioAge Labs** is using AI to discover biomarkers to target molecular causes of ageing. Faster diagnosis through AI means faster healthcare outcomes, and ultimately longer living.

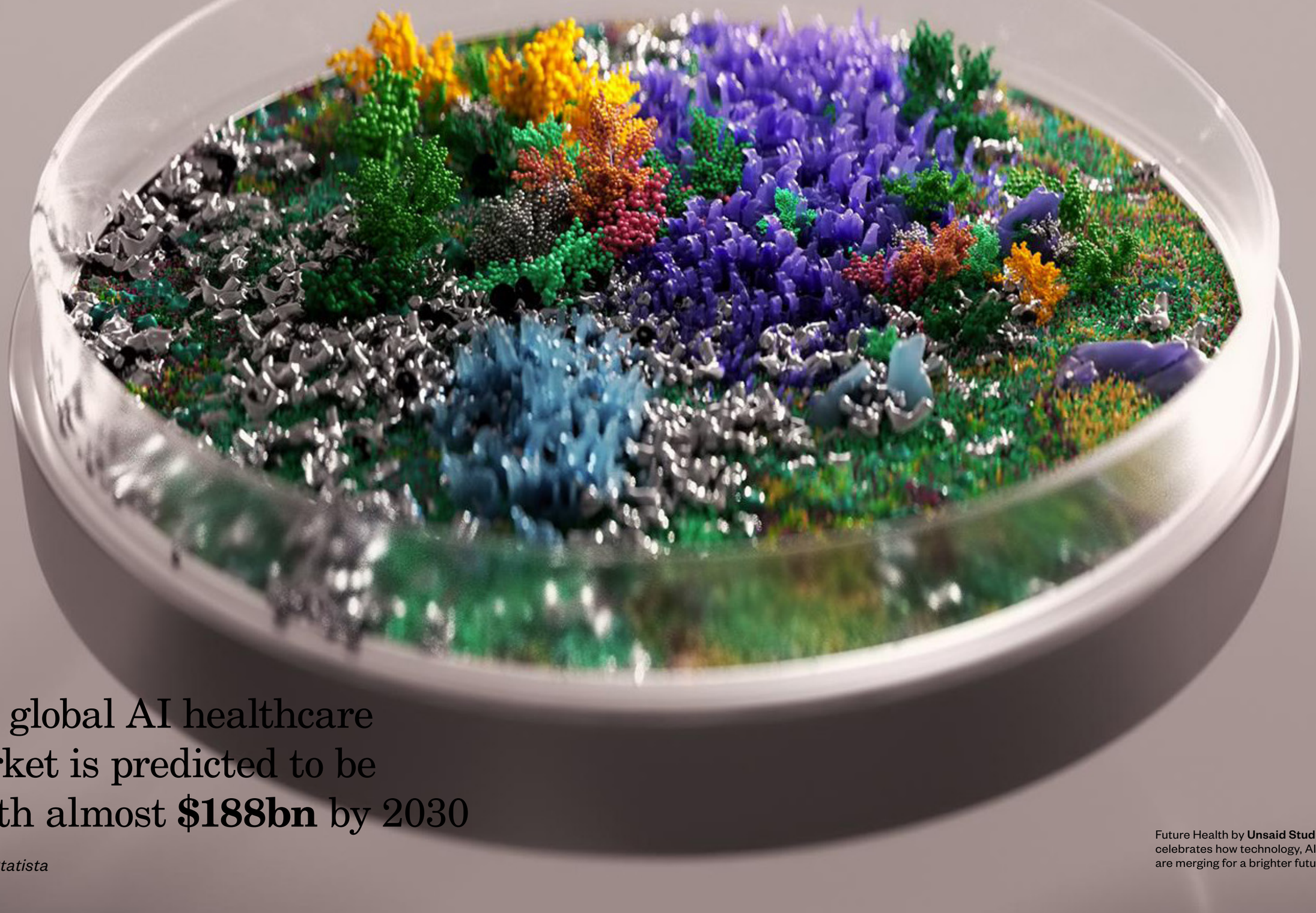
Alex Devereson, who works for **McKinsey & Co** advising pharmaceutical and biotech companies, suggests that AI will become fundamental in helping the medical community to configure new drugs that would take humans 10 times as long to invent. ‘We will have life-changing, game-changing drugs – on a scale and at a pace that we’ve never seen before, getting to the right patient at the right time,’ says Devereson.

AI technology will also be employed in tactile therapeutics that aid longevity, such as the Neural Sleeve created by California start-up **Cionic** and designer Yves Béhar’s US-based studio **Fuseproject**. Designed to be wrapped around the leg, the bionic wearable is managed by the wearer through an app, and uses electric pulses and artificial intelligence to correct muscle movements in people with limited mobility. AI tools are used more commonly to ameliorate the effects of ageing body parts. ‘We want it to be something that people celebrate,’ says Béhar – even creating different colourways for wearers to ‘show off’.

‘[With the help of AI], we will have game-changing drugs – on a scale and at a pace that we’ve never seen before’

*Alex Devereson, partner, McKinsey & Co*





The global AI healthcare market is predicted to be worth almost **$188bn** by 2030

*Source: Statista*

Future Health by **Unsaid Studio** celebrates how technology, AI and biology are merging for a brighter future, US

# Instant Age Relief

While research on reducing the physical, mental and emotional symptoms of ageing continues, singular medical advances could be used to resolve isolated age-related ailments in an instant.

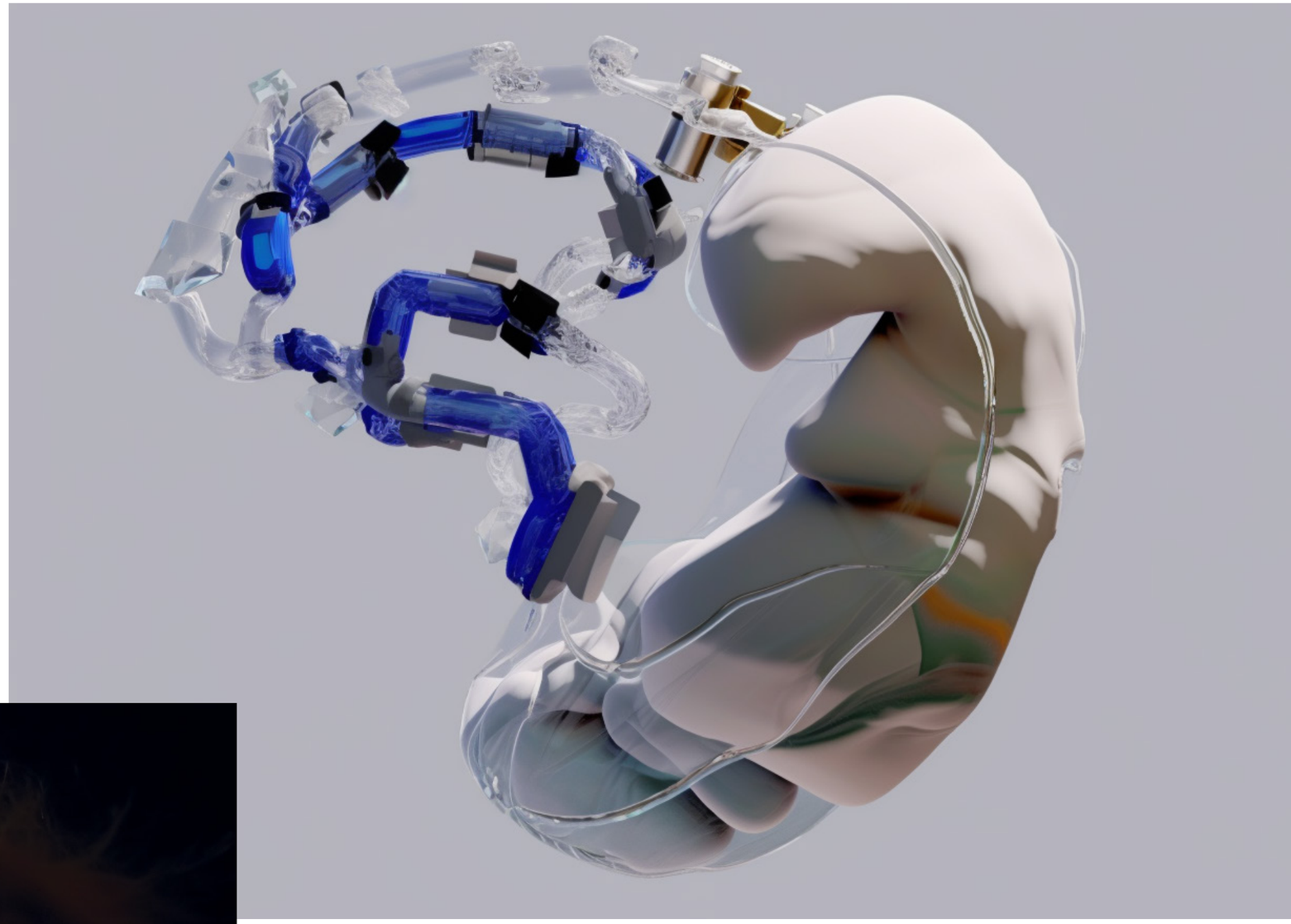
Individual innovations providing incremental fixes that de-age our physiques incrementally could add to the global regenerative medicine market's projected growth to £121.6bn ($153bn, €138.6bn) by 2029 (source: **Fortune Business Insights**).

Anna Bjurstam, wellness pioneer at hospitality brand **Six Senses**, talks about the treatments that are already in use but which have further potential. 'The notion that you can actually inject platelet-rich plasma (PVP) or stromal vascular fraction (SVF), depending on how serious it is, into your knee joint and not have to have surgery and make it 10 years younger by doing a simple injection, is amazing.'

Former **Google** engineer and futurist Ray Kurzweil speculates that nanobots could go even further with cellular-level body repairs that fight against immunity, disease and ageing. Tiny robots have been used to perform clinical medicine tasks that mend the body, including DNA probing and supplying drugs to brain tumours.

Kurzweil, who in 2005 wrote The Singularity is Near detailing the point at which machine intelligence and humans would merge, believes that site-specific nanobot technologies could help humans reach full immortality in as little as eight years.

It is also worth noting that Kurzweil believes that by the early 2030s the amount of non-biological computation will exceed the capacity of all living biological human intelligence. It is this computing capacity that will lead to singularity, and Kurzweil has even given an expected date for this transformation in human capability as 2045. The implications for ageing are profound.





Left and above: AI imagery by **The Future Laboratory**, UK

The global regenerative medicine market is projected to grow to **$153bn** by 2029

*Fortune Business Insights*




Question of Matter by **Greta Ballschuh** proposes a concept for circulating nutrients and minerals to make recurring life possible, The Netherlands

## Optional Death

And if immortality was achieved and death wasn't guaranteed, what would life look like? And how would the narrative of death change? In the far future, perhaps it could be a choice, and one far less painful and negative.

'Even if we do tire of life itself aged 250, wouldn't you rather go in a short, painless manner at a time of your own choosing, rather than having life slowly and painfully taken from you over decades by the ageing process?' University of Oxford physicist Andrew Steele writes in Polytechnique Insights.

At present, the only legal options for such an outcome are euthanasia and assisted dying. Spain recently became the sixth country worldwide to legalise euthanasia. Recent Japanese film Plan 75, however, hypothesises about a near future in which the government offers voluntary euthanasia to anyone over the age of 75 in exchange for a small cash reward. If longevity technologies extend our lives well enough, proposals to encourage us to die may become necessary.

As longevity technologies become more advanced, and voluntary death becomes commonplace, death will also be celebrated in a different light – through physical commemorations and the digital afterlife.

While some might choose to host big parties, similar to those experienced in Ghanaian and Balinese cultures, others might prefer a more discreet exit – brand legacy. Sir Fraser Stoddart, creator of **Noble Panacea**'s OSMV technology, recognised his lifespan wasn't long enough to achieve his ambition, and so he translated his technological discovery into an accessible market: skincare. But the hope is that this will also make its way into health treatments in the future.

Similarly, the online world is not only becoming a space for memorialising people's lives, but also creating a digital afterlife that can continue where the living left off.

# Future Views

The potential impact that longevity will have on the way we work, organise and connect with each other – and find meaning in living longer lives – could be profound. Here we explore the wider future scenarios to consider

## Shifting Populations

'We need a more robust active population living longer and working productively,' Dr William Kapp, co-founder of preventative healthcare organisation **Fountain Life**, tells The Future Laboratory, emphasising the social good in improving health spans in the US as a way of preventing further strain on the country's healthcare systems, and ultimately its economy.

Although the global population reached 8bn in November 2022, certain societies are in decline.

A report from the EU's statistics office projects the bloc's population will peak in 2026 at 453m people, before falling to 420m in 2100 (source: **EuroNews**). According to China's **National Bureau of Statistics**, the country had 850,000 fewer people at the end of 2022 than in the previous year (source: **The Guardian**).

The **UN** isn't concerned about global population rise in general, estimating that about 60% of people live in countries with fertility levels below the recognised replacement level (source: UN). But in the future some societies may find it necessary to pursue longevity for their social and economic survival.

Sebastian Dettmers, author of The Great Workerlessness, highlights this concern as he considers the future of the world's population. 'People are healthier, richer, better educated, living longer and having fewer children,' he writes. 'The great labour shortage caused by the declining population could cripple our global economy unless we find innovative ways to keep things running.'



AI imagery by **The Future Laboratory**, UK

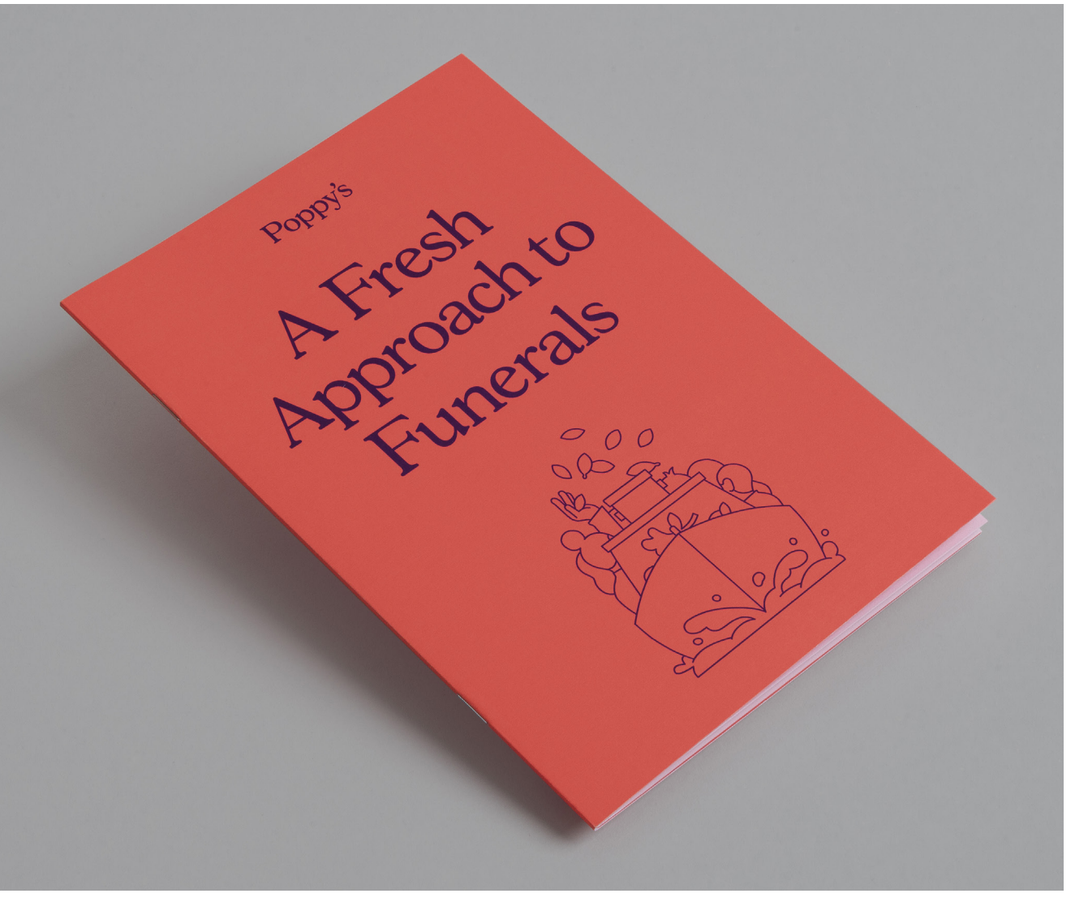
## Opt-out Mindsets

‘Western-centric fantasies about eternal life currently ignore the lethal, giant elephant in the room,’ foresight analyst and Extinction Rebellion campaigner Steve Tooze tells The Future Laboratory. ‘On current **IPCC** [Intergovernmental Panel on Climate Change] projections of 3–4 degrees of global warming by mid-century, the current probability of a long and happy life for nine out of 10 humans alive today is very low.’

The present state of the world, with its wars, a recent pandemic, political instabilities and perma-crises, raises an existential question about the future of longevity: do we really want to live longer?

A study of Norwegians aged 60 and over found they wanted to live just over 91 years, which is five years longer than current life expectancy for a 70-year-old in that region (source: **Age and Aging**). By contrast, a study by **Ipsos** showed that only 35% of Britons wish to live to 100, while 70% of Americans hope to reach that milestone (source: **Edward Jones and Age Wave**). The **Stanford Center on Longevity** predicts that over half of today’s five-year-olds in the US will be expected to have a 100-year lifespan by 2050, but admits that institutions, economic policies and social norms are not currently equipped to meet the needs of future centenarians.

What happens if longevity improves the human health span so well that we easily exist beyond the age we would desire to? How then do we approach death? Do we view it as a choice, an opt-in? It is, for now, an inevitable destination, and the question is how we will find relief in being able to choose our time of departure.






Left: **Lovers** has rebranded death in a positive light for funeral brand **Poppy**’s, UK; Above: **Zalando** and **Adidas**, Germany

## Evolving Family Dynamics

One significant change that longevity is likely to bring is a shift in the traditional family structure.

Families have become smaller entities in recent decades due to the rise of single-person households, increased cohabitation, and marriage and partnerships with children becoming less common. In the UK this has resulted in the growth of a ‘sandwich generation’ – individuals balancing the needs of their ageing parents with the demands of their young children and careers. According to **Unum**, more than one in three people feel that belonging to this generation has taken a toll on their mental health, with 29% also experiencing it as a financial strain.

With longevity improving health, older adults who are still active are a potential resource, contributing to their families in new and meaningful ways by sharing their time, wisdom and experience.

This expansion of family units can be seen as an example of **Neo-collectivism**, a concept The Future Laboratory explored in a 2022 macrotrend with an outlook to 2030. It becomes a mass re-organisation of society, promoting empathy and turning neighbours into family and family back into neighbours. A global study by **HSE University** found a positive association and higher life satisfaction resulting from this family-based collectivism for young people.

If quality of life is assured and the burden of care for the elderly relieved, longevity could help create stronger and more resilient families better equipped to face the challenges of the future.



AI imagery by **The Future Laboratory**, UK



## Betterment

Exhausted by recent socio-economic traumas and environmental doomerism, consumers are on a renewed search for meaning in life.

Tim Jones, head of brand strategy at global branding agency **Venturethree**, notes a growing philosophical approach to consumerism which is informed by purpose. '[We see] consumers increasingly asking themselves: 'What do I believe in? What are my principles? What is essential to my being and so my role in the world?"

Consumers are moving their collective focus away from the demands of consumerism and looking for pursuits that have betterment at their core.

Living longer could theoretically offer people more time to engage in such existential contemplation, more time to focus on their individual purpose and to choose broader aspirations.

'Increasing the duration of people who have seen a lot and have a bigger base of knowledge is extremely valuable,' Leonard Guarente, co-founder of **Elysium Health**, a health product manufacturing company that launched its own-brand anti-ageing supplement in 2021, told **Ageist** magazine. 'People may be more motivated to take action if they anticipate being around longer. So the science of ageing can help societies come to grips with large problems that will play out in the future.'

## Longevity Economy

A discussion on the longevity economy was tabled at the **World Economic Forum 2023**. Speaking on a panel about super-ageing, Darryl White, CEO of Canadian bank **BMO**, suggested a radical non-linear approach to life, moving away from the traditional school-work-retire framework. 'I could decide that I want to start working earlier. I could decide that I want to retire later,' he said. 'I could decide that I want to have various recommitments to my career as I re-invent myself' (source: World Economic Forum).

Upskilling and reskilling are becoming key investments for employers and governments to make. The World Economic Forum calculated that by improving access to life-long learning goals, increased global workplace productivity could add £6.6 trillion ($8.3 trillion, €7.6 trillion) to global GDP by 2030.

Although consumers have concerns about working longer, as seen when strikes broke out in France in 2023 over proposed retirement age increases, older working populations are becoming inevitable.

According to the **US Bureau of Labor Statistics**, the number of people aged 75 and older in the American workforce is expected to grow by 96.5% by 2030.

For it to be feasible for us to have longer working lives we need to develop healthier working conditions alongside our longevity goals. Governments and employees especially must become robust in tackling ageism, which the **UN** views as a global priority, and rigorous in recruiting multi-generationally.

Below and right: AI imagery by **The Future Laboratory**, UK





## First World Privilege

The pursuit of longevity can be viewed as a first world privilege, as it requires easy access to healthcare, high-tech science and costly products.

This jars with the uncomfortable global reality that many people don't have sustainable healthcare. The **Tropical Health and Education Trust** (THET) says that each year in low- and middle-income countries between 5.7m and 8.4m people die due to poor-quality care, accounting for up to 15% of overall deaths.

Longevity could be harnessed as a tool to make healthcare more equal and equitable by proposing that we look at it differently, beyond curative access.

Dr William Kapp, CEO of preventative healthcare organisation **Fountain Life**, notes that emerging countries are building their health and wellness systems with this thinking in mind.

'We are now being approached by Saudi Arabia, UAE and India to come and look at what we're doing inside of Fountain Life as a predicate for the new development of healthcare,' he tells LS:N Global. 'They don't want to wait until you're broken.'

This is a valuable paradigm shift, with the potential to change consumers' perception of good health, beauty and wellness. They will no longer be content with pursuing products and outcomes that help them survive their physical selves, but will be looking for those things that help their bodies thrive.

# Strategic Implications

The key steps for beauty, health, and wellness companies to consider as they move towards longevity, ensuring the safety and sustainability of their offerings



Anatomic Chair by **Nynke Tynagel** and **Byborre**, The Netherlands

# Strategic Actions

Businesses and brands must make consumers feel informed, comfortable and connected with the desire to live longer as the longevity mindset takes root

## Mindset Shift

There is a shift from positioning youth as a driving aspiration to a focus on longevity. Consumers will look to businesses and brands to help them feel at ease with the idea of living longer and having more control over the length of their lives. Lead them through this paradigm shift by being comfortable with, and demonstrating confidence in, the new science, language and philosophy of longevity



Photography by **RF_Studio**, South Africa

## Mainstreaming Longevity Beyond Sci-Fi

Longevity can feel esoteric to many consumers. Support and inform life-long health and fitness habits by being the go-to expert and partner for life-long nutritional support, promoting the benefits of long-term over quick-fix approaches. Look to data and smart innovations to identify shortfalls between chronological and biological ages, and provide the required solutions to reverse, reduce and mitigate



Photography by **Polina Tankilevitch**, UK

## Flat Age Products

Encourage consumers to embrace a neutral perspective on ageing. Develop beauty, health and wellness products that address the body's unique stages and experiences, rather than relying on age categories. Tailor products to identities, lifestyles and moods, giving different consumer demographics the opportunity to connect through shared beauty, health and wellness products



**Wearables**, US

# Thought-starters

Longevity is innovation fuelled by optimism; it is a new life plan. What are the collaborative opportunities for brands and businesses reaching out beyond the beauty, health and wellness sectors, from leisure and hospitality partnerships to food and drink and nutritional science?

## Dig into prevention mindsets

Longevity demands that we shift from curative beauty, health and wellness mindsets. How can your brand create messaging that makes prevention compelling to consumers?




**Welly**, US

## Reframe ageing talk

Longevity allows us to discuss the process of growing older more openly. Can it also help us to develop a language around ageing that is more inclusive and celebratory?




Salad merchandise by **Sweetgreen**, US

## Focus on future fulfilment

Consumers may eventually look for more fulfilling ways to spend any additional time that longevity offers. Can your brand create tools that help them to optimise it?



Networked Intimacy by **Modem**. Visuals by **Maxime le Grelle**, Amsterdam

# Key Statistics

Here we present a set of key statistics from the report, including general market and sub-category overviews and longevity-focused data that provide your business with the evidence and confidence it needs for future decision-making

## Markets

### Beauty and Personal Care

Revenue in the beauty and personal care market is **£456.5bn** ($571.1bn, €525.5bn) in 2023. The market is expected to expand at a compound annual growth rate (CAGR) of **3.8%** from 2023 to 2027

*Source: Statista*

### Health & Wellness

The health and wellness market worldwide was estimated to be over **£3.4 trillion** ($4.3 trillion, €3.9 trillion) in 2020, a figure set to increase to almost **£5.6 trillion** ($7 trillion, €6.4 trillion) by 2025

*Source: Statista*

### Fragrances

The global perfume market was valued at **£40.63bn** ($50.85bn, €46.79bn) in 2022 and is expected to register a CAGR of **5.9%** from 2023 to 2030

*Source: Grand View Research*

### Cosmetics

Revenue in the cosmetics market amounts to **£82.9bn** ($103.8bn, €95.5bn) in 2023

*Source: Statista*

### Food & Nutrition

In 2022, the global health and wellness food market was valued at **£672.1bn** ($841bn, €773.7bn) and is projected to increase to **£799bn** ($1 trillion, €920bn) by 2026

*Source: Statista*

The global personalised nutrition market was valued at **£8.3bn** ($10.4bn, €9.5bn) in 2021 and is projected to be worth **£30.4bn** ($38bn, €34.9bn) by 2030, increasing at a CAGR of **15.49%** from 2022 to 2030

*Source: Precedence Research*

The majority of the global population (**51%,** or over **4bn** people) will either be overweight or obese by 2035 if current trends prevail, and the total cost of treating illnesses related to obesity will be an estimated **£3.45 trillion** ($4.32 trillion, €3.97 trillion) per year

*Source: World Obesity Federation*



Photography by **Sunny Ng**, China

# Sub-categories

## Health Technology

Wearable devices offering seamless healthcare monitoring are becoming more intelligent, with the global wearable technology market estimated to reach **£227bn** ($283bn, €258bn) in 2027

*Source: Statista*

Some **45%** of wearable-owning consumers say they enjoy looking at their data, highlighting their need for more information

*Source: GWI*

The global AI healthcare market is predicted to be worth almost **£150bn** ($188bn, €170bn) by 2030

*Source: Statista*

• *Read more in Prevention Providers (page 15) and AI Reliance (page 30)*

## Femtech

The global femtech market is projected to reach **£3.3bn** ($3.8bn, €3.8bn) by 2031

*Source: Future Market Insights*

• *Read more in Tech-powered Perimenopause (page 6)*

## Wellness Tourism

Wellness tourism is booming, with the industry projected to reach **£1 trillion** ($1.3 trillion, €1.2 trillion) by 2025

*Source: Global Wellness Institute*

• *Read more in Longevity Clinics (page 22)*





Left: Luma concept by **Morrama**, UK; Above: **Toi Toi Toi Creative Studio** for **Contentful**. Photography by **Koy+Winkel**, Germany

## Workplace Wellness

The global corporate wellness market was valued at **£42.4bn** ($53bn, €48.7bn) in 2022 and is expected to expand at a CAGR of **4.47%** from 2023 to 2030

*Source: Grand View Research*

• *Read more in Multi-domesticity (page 6)*

## Clean Beauty

The global clean beauty market was valued at **£5.76bn** ($7.22bn, €6.43bn) in 2022. The market value is expected to reach **£11.47bn** ($14.36bn, €13.20bn) by 2028

*Source: ResearchAndMarkets*

• *Read more in Purified Beauty (page 8)*



AI imagery by **The Future Laboratory**, UK



# Longevity

## Ageing Populations

Life expectancy has been rising globally for two centuries, although consumers are not physically healthier

*Source: Our World In Data*

On average, people spend about **50%** of their lives in less-than-good health, including **12%** in poor health, and this ratio has not changed much in the past 50 years

*Source: McKinsey Health Institute*

Between 2015 and 2050 the proportion of the world's population aged over 60 will nearly double from **12%** to **22%**

*Source: World Health Organization*

There are now more people aged 65 and over in England and Wales than children aged under 15

*Source: The Guardian*

China's National Health Commission expects the generation of people aged 60 and over to rise from **280m** to more than **400m** by 2035 – equal to the entire current populations of Britain and the US combined

*Source: World Economic Forum*

Some **17%** of people living in the US, or more than one in six, were 65 or older in 2020. That represents **55.7m** people, an increase of **15.2m** (38%) since 2010, and the figure is predicted to reach 80.8m by 2040

*Source: Administration on Aging*

## Research and Investments

The top 50 longevity-focused companies had raised more than **£799m** ($1bn, €920m) in venture funding as of 2020 – a sizeable amount that continues to rise due to the growing conviction that the longevity market could outstrip the existing healthcare market in the long run

*Source: Deloitte*

Some **£4bn** ($5bn, €4.5bn) has been invested in ageing drug development since 2020

*Source: The Harvard Gazette*

A slowdown in ageing that increases life expectancy by one year is worth **£30.3 trillion** ($38 trillion, €35 trillion), and an increase by 10 years is worth **£293 trillion** ($367 trillion, €337 trillion)

*Source: Nature Aging*

Searches for 'Longevity Centre' have risen **85%** year on year, while 'Age Positive' (**+56%**) and the 'Opal Institute' (**+55%**), both represent positive attitudes to ageing and sexual health among older consumers

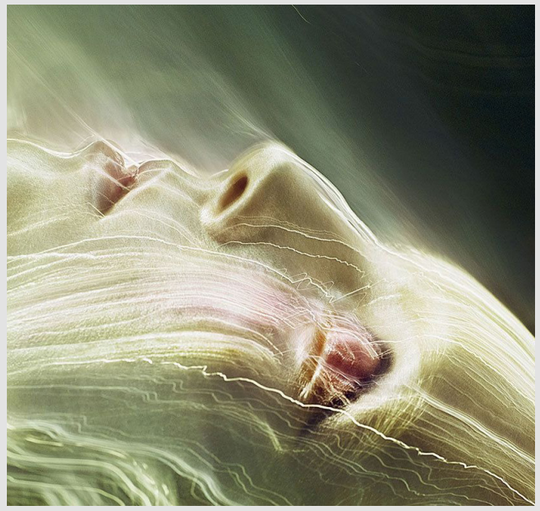
*Source: Google Keyword Planner (February 2022–January 2023, Global English: Yearly Growth Percentage and Monthly Average Searches)*

# Related Macrotrends

2015

## The Optimised Self

Humanity is on a quest – not for perfection, but for optimisation – to be the optimal versions of ourselves, the most effective and the most efficient that we can be



You Look Electrifying for **i-D magazine.** Photography by **Sølve Sundsbø**, UK

2018

## Certified Wellness

The worlds of health and wellness are converging as consumers seek a new framework for healthy living that prioritises convenience, accessibility and fidelity



**The Future Laboratory** Health and Wellness campaign. Photography by **Louise Hagge**r, UK

2021

## Synchronised Care

Self-care is now a force for collective health that is interconnected with every aspect of our lives and interdependent on the world around us

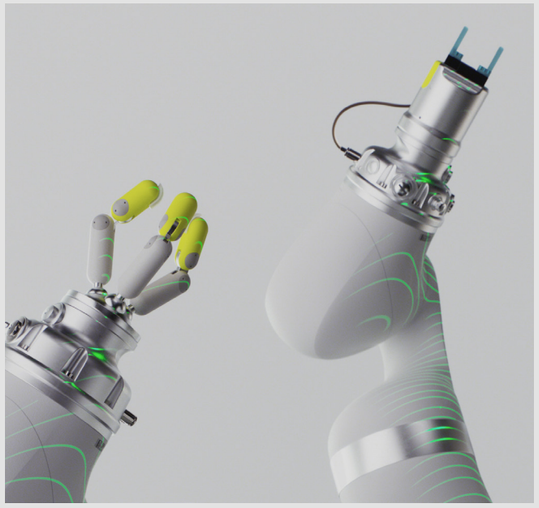


**Open** creative by **Some Days**. Photography by **Emman Montalvan**, US

2022

## Accredited Beauty

As consumers seek proof points on product quality, efficacy and sustainability, scientific evidence will drive the healthification of the beauty industry



N.Bio by **Phillip Peters**, UK

# Strategic Worksheets

These strategic worksheets are to help you apply this macrotrend to your business



# Prioritisation

Consider the following:

## Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity

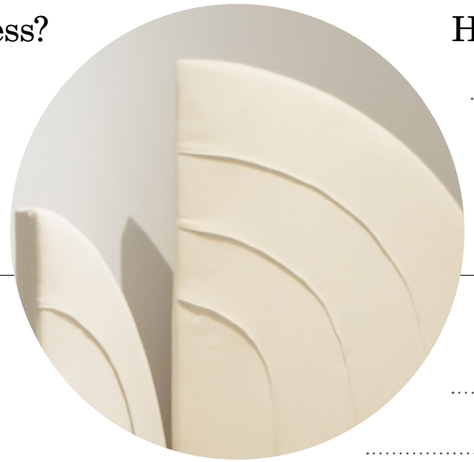
Identity | Purpose | Security | Fulfilment

## Which driver will have the most impact on your brand/business?

Urbanising World | Micro-globalisation

Accelerating Technologies | Evolving Demographics

Climate Crisis and Resource Scarcity | Fragmenting Societies



# Influence

Consider the following:

## How will this trend affect how you fulfil that need?

## What impact could these drivers have on the business?

## Select two insights that feel most relevant to your brand/business:

## How do these insights align with your brand's trajectory?

## How could you apply these insights to your business?

## Which foresight scenario is your company least prepared for?



## What is most surprising about this foresight scenario?

# Consider how this macrotrend could impact the following pillars of your brand:





## **01** Culture

What cultural conversations are emerging and who are the tastemakers?

How do we add value to culture?

What will our consumers pay more for in the future?

## **02** Category

What's our greatest opportunity?

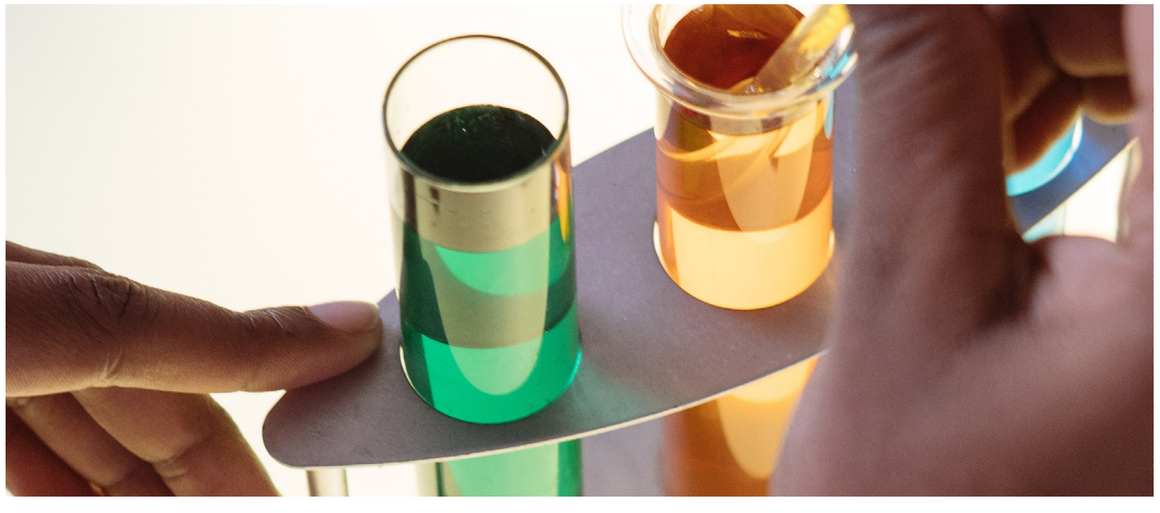
How is the competition evolving?

How can we differentiate?

Cover: **Haeckels**, UK; Above left to right: Meet the Marnis, **Highsnobiety**. Photography by **Piotr Niepsuj**, Italy; **Ethical Cosmetics**, Australia

Consider how this macrotrend could impact the following pillars of your brand:





## 03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

## 04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

Above left to right: Photography by **Anna Shvets**, Russia; Photography by **RF_Studio**, South Africa

# Planning

YEAR 1

Over the next 12 months, how will this macrotrend affect your team?

YEAR 3

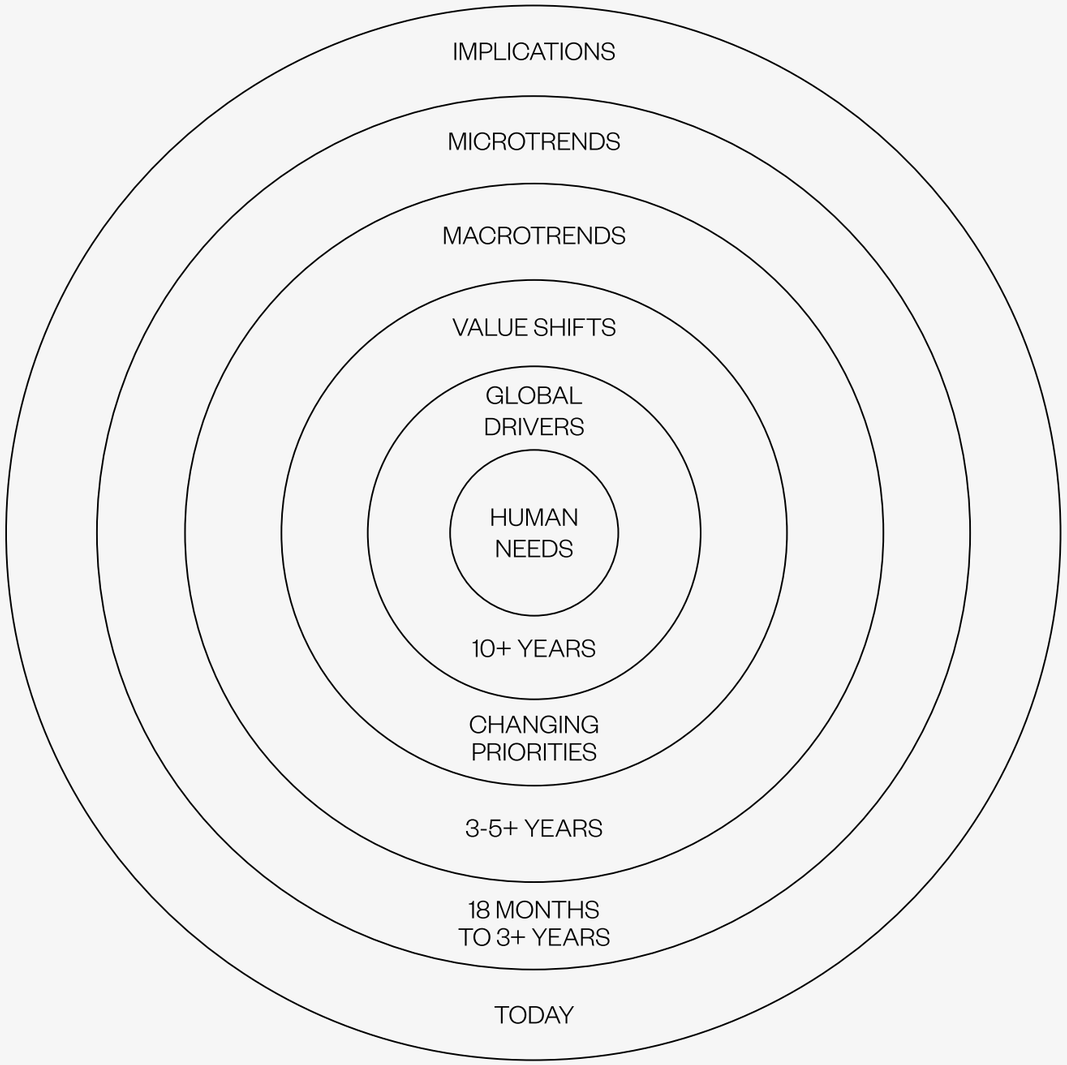
In three years, how will this macrotrend change the brand?

YEAR 5

In five years, how will this macrotrend change the business?

# Methodology

The Future Laboratory's unique proprietary methodology allows us to track, monitor and determine the key drivers of change affecting future consumers, culture and business. Here is how we identify our trends




The Future Laboratory's proprietary foresight methodology



# Introduction

Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

However, our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is provable, practical and minimises uncertainty.

We do this by understanding the influence of six global drivers causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging macrotrends and microtrends, and ascertain what their implications are for the future landscape.

# Futures Taxonomy

At the heart of The Future Laboratory is a taxonomy that our teams have used since the millennium to shape the strategic thinking and foresight capabilities of FTSE 100, Fortune 500 businesses, and progressive brands and disruptors.

We use this methodology to map, monitor and interrogate the future. It serves as the foundation for everything we do as a business, and is based on six layers of hindsight, insight and foresight:

## **01** Human Needs

Static and universal needs, based on a value system that supports human nature's physical and emotional programming

## **02** Global Drivers

The shifting social, technological, economic, environmental and political landscape reshaping the world we live in, affecting everyone and everything

## **03** Value Shifts

Consumers' changing attitudes and behaviour – a reaction to their contemporary context

## **04** Macrotrends

The cultural manifestations of new and emerging attitudes worldwide

## **05** Microtrends

Influential short-term signals indicated by innovation

## **06** Implications

Future implications for brand and business growth



# The Seven Human Needs

The seven human needs are timeless and universal. Based on a value system that supports human nature's physical and emotional programming, each human need is of importance to us as individuals and together they form the foundation of society as well as that of our methodology:

Why they matter:

Every day consumers make decisions based on what they feel and believe is most important. By aligning our research with these static needs, businesses gain a deeper understanding of how the needs of early adopter consumers will translate into product and service needs as their values shift with the global drivers.

# The Seven Human Needs

## Security

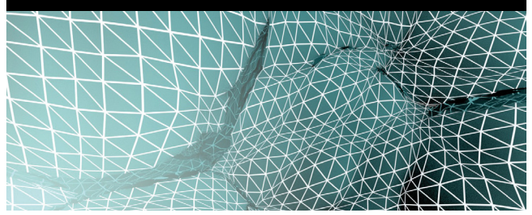


At the core of humanity is a fundamental need for structure, control, certainty and stability. It is a basic human survival instinct to protect ourselves and our loved ones from perceived physical, emotional and economic threats

**KEY ELEMENTS**

Finance, Health, Food, Shelter, Employment, Safety, Environment, Wifi

## Fulfilment

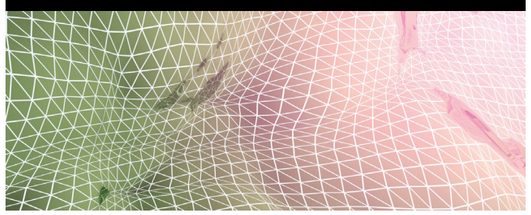


There is a human desire to direct our own lives, to create forms of freedom, and to find deeper meaning and balance in life. It is the psychological need to fully realise our personal potential with the resulting feeling of satisfaction

**KEY ELEMENTS**

Wellness, Spirituality, Love, Emotions, Self-esteem, Beauty

## Belonging

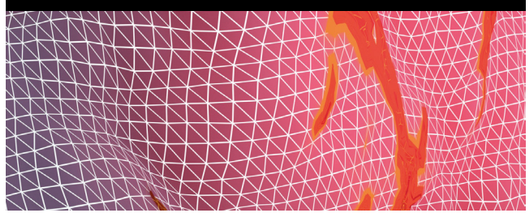


It is a social need to be physically connected to a group of like-minded people. We have an emotional urge, on an individual level, to create support systems and relationships that provide us with acceptance and approval

**KEY ELEMENTS**

Nationalism, Tribalism, Roots, Conviviality, History, Culture

## Curiosity

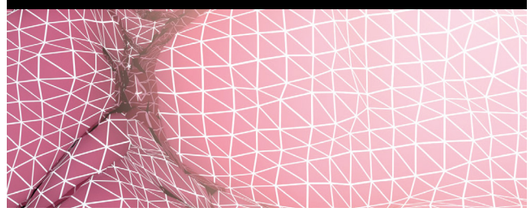


To both create and co-create makes us push the boundaries of what is ultimately humanly possible. Our in-built intuition makes us inquisitive beings with a shared inclination to discover or challenge the norm

**KEY ELEMENTS**

Exploration, Education, Connoisseurship, Discernment

## Identity

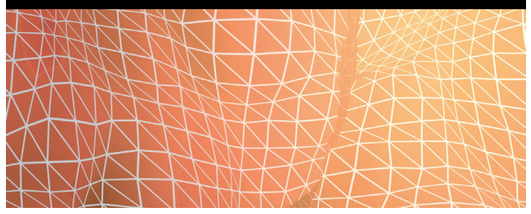


We have a need to distinguish our character or personality from others and to feel unique and respected for who we are. We build our sense of who we are through a personal exploration of gender, sexual orientation, ethnicity and age

**KEY ELEMENTS**

Gender, Age, Ethnicity, Religion, Nationality, Self-image, Language, Collectivism, Morals

## Attainment

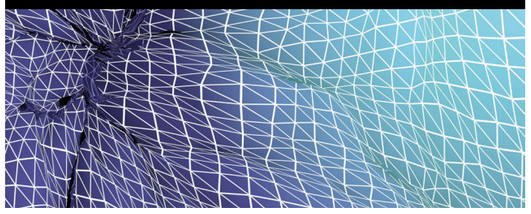


All human beings need to feel respected and recognised among their peers, which drives the desire to constantly express our significance and success, our knowledge and tastes, with our achievements often reinforced through the acquisition of symbolic goods

**KEY ELEMENTS**

Knowledge, Taste, Work, Respect, Prestige, Connoisseurship, Ownership

## Purpose



It is in the interests of the human species for all of us to contribute, participate and add collective value to progress. Each day we plan for a better tomorrow, aligning our passions with our purpose to grow and achieve collective betterment

**KEY ELEMENTS**

Meaning, Ethics, Mastery, Learning, Collectivity, Sustainability, History, Culture

# The Six Global Drivers

Global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in. They are factual, objective and long-term structural forces that are pervasive, powerful and transformative.

Why they matter: What's next

These are the fundamental shifts or external forces that have the potential to reshape the future trajectory of a brand or business. They help to contextualise decision-making by considering why and how the world is being reshaped. They enable clients to rethink what kind of world consumers will live in and therefore what will drive the businesses of tomorrow.



# The Six Global Drivers



## Accelerating Technologies

With technological adoption and innovation continuing to accelerate, and new developments in AI and blockchain technology dominating headlines over the past year, the limits of technological progress and its impact on civilisation are almost unfathomable



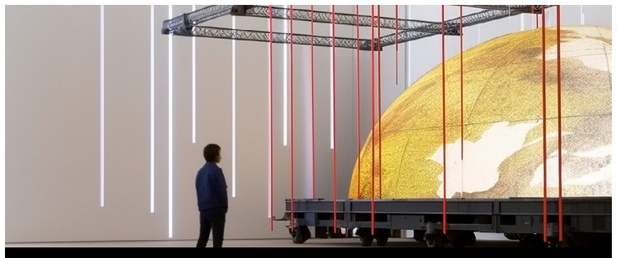
## Climate Crisis and Resource Scarcity

The urgency surrounding climate change is now a full-blown emergency, existentially threatening humanity and industry. But ambitious goals and targets are emerging, backed by tangible action plans, alongside a growing sense of pragmatism over doomerism



## Evolving Demographics

Over the next decade, the shape of our global population is set to change dramatically. These shifts will redefine tomorrow's demographics and profoundly reshape societal and cultural systems in terms of identity, beliefs and values



## Micro-globalisation

After decades of liberalisation, the world we live in is inextricably interconnected – socially, technologically, economically, environmentally and politically. But lack of equitable collaboration has stymied mutual progress, leaving us in a state of co-dependency rather than cooperation



## Fragmenting Societies

Fractious inequalities and divisions are being exposed in a fast-changing, unstable world. VUCA (volatile, uncertain, complex, ambiguous) has often been used to describe this situation, but today, BANI (brittle anxious, non-linear and incomprehensible) is emerging as a more appropriate acronym



## Urbanising World

Despite ever-evolving migration patterns and the repercussions of a global pandemic, cities remain the financial, technological and cultural epicentres of society, acting as the main environments for daily life and work for a vast majority of the global population

Global Drivers 2030, AI artwork by **The Future Laboratory**



# The Value Shifts

We know that our needs are prioritised, expressed and pursued differently as time, culture and social requirements change.

The evolving forces sitting above these needs are changing our value expectations, transforming our aspirations and priorities, and beginning to reveal the role, the purpose and the direction that brands and businesses can take as they move towards 2030.

Identifying how societies and culture are changing provides the sociocultural context for our macrotrends.

Why they matter: What to plan for

As consumer values shift from year to year, we track their evolution through the lens of our global drivers and human needs to help businesses stay ahead of the cultural curve and understand the trajectory of the trends they have invested in or should be investing in.

# Make a better future happen

This report is based on macrotrend research from The Future Laboratory's trends intelligence platform, **LS:N Global**.

Did you know that members get free access to all of our trend reports?

We can also deliver our research to your business in a number of ways, from **virtual presentations** to **strategic workshops** and **bespoke reports**.

If you want to find out more, say **hello@thefuturelaboratory.com**

AI imagery by The Future Laboratory, UK


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The Future Laboratory is one of the world's foremost strategic foresight consultancies. Members of our trends intelligence service LS:N Global get exclusive access to the mindsets defining tomorrow and the early adopters driving global change across eight industry sectors.

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