



Rapidly disseminated consumer trends and self-care resolutions will act as drivers of growth for categories and brands with health/wellness claims or associations. Unfortunately, threats to emotional health and sustainable personal rhythms will also act as drivers by compounding problems and influencing searches for health/wellness improvements.

To the extent that some of these health/wellness products actually advance the cause of health/wellness, or at least contain safer, higher-quality ingredients, D2C could be a new technological means of expanding distribution to communities traditionally underserved by brick-and-mortar retail. In the future, unmanned stores could also potentially address these types of inventory disparities. Both technological approaches will reduce “friction” from the retail process.

Health/wellness D2C brands, in particular, tend to pursue various types of product certification, sometimes to turn a higher ethical valuation into a higher economic valuation, but the market may soon require a more substantive degree of traceability, empowered by technology.

#### COMPANIES MENTIONED:

Established brands and retailers, as well as emerging D2C startups, are covered in this report, such as:

- Whole Foods
- Ulta Beauty
- Lululemon Athletica
- Birchbox
- Athena Club
- Health-Ade
- To’ak Chocolate

#### KEY QUESTIONS ANSWERED:

As self-care and self-soothing become equated, the line between beauty and health/wellness categories is also blurring:

- According to Trustpilot research, 45% of U.S. consumers said they purchased beauty products in order to treat themselves; 51% cited that same reasoning in the U.K.
- According to Ulta Beauty, the largest U.S. retailer in its category, 65% of customers conflate beauty with wellness.<sup>17</sup>
- In a pre-COVID “You-Time Report” from Birchbox, a D2C subscription-based beauty and grooming brand, 72% of Americans associated beauty or grooming rituals with self-care, and younger generations made this association more often.<sup>18</sup>

After conducting a global study of wellbeing, athletic apparel company Lululemon Athletica concluded that the results expose a paradox at the heart of wellbeing. People tend to say that they feel fine, but only 29% report strong wellbeing across the physical, mental, and social aspects of their lives.<sup>19</sup>

Vagaro, an online booking/payment vendor specifically for salons, spas, and fitness, commissioned a survey of 2,000 Americans’ self-care activities and perceptions. 69% of respondents planned to practice more self-care in 2021.

They also attributed this evolution of perspectives to society at large, with 70% believing that self-care isn’t just a pandemic trend and 71% anticipating a higher prioritization of self-care over the next five years.<sup>20</sup>

<sup>17</sup> <https://www.trustpilot.com/review/2021/02/25/ig/beauty/self-care-themes-beleaves.html>  
<sup>18</sup> <https://www.birchbox.com/updates/whos-the-you-time-report>  
<sup>19</sup> [https://p1mimages.lululemon.com/content/dam/lululemon/lululemon\\_2021\\_State\\_Wellbeing\\_Report.pdf](https://p1mimages.lululemon.com/content/dam/lululemon/lululemon_2021_State_Wellbeing_Report.pdf)  
<sup>20</sup> <https://www.vagaro.com/news/home/2021/04/05/32/en/Pages/Survey-75-of-Americans-BelieveSelf-Care-Activities-Provide-Stress-Relief>

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Health/wellness survey data has repeatedly shown that lifestyle aspirations are high but time is short. Meaningful self-care is at least a few slots down in many people’s hierarchy of values.

This data puts a modern twist on The Golden Rule: People do not treat themselves as they want to be treated. But they say that they will, from now on.

Pre-COVID, in 2019, the Global Wellness Institute assessed the global personal care, beauty, and anti-aging sector of wellness at \$1.083 billion. Their definition of the global wellness economy was inclusive of many different and hard-to-categorize economic areas but they estimated it at \$4.5 trillion overall.<sup>22</sup>

In 2020, U.S. e-commerce sales increased by 32.4% to a total of \$791.7 billion, according to the U.S. Department of Commerce. These digital activities are now claiming a greater share of retail, roughly 14% of all sales, up from 11% in 2019.<sup>23</sup>

<sup>21</sup> <https://globalwellnessinstitute.org/wp-content/uploads/2019/02/Global-Wellness-Economy-Bubble-Chart-2019.pdf>  
<sup>22</sup> [https://www.congress.gov/ital/mfz/www/itala/pdf/nc\\_current.pdf](https://www.congress.gov/ital/mfz/www/itala/pdf/nc_current.pdf)

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- How have new technologies transformed the business practices of direct response, mail order, and even direct selling? Which aspects or techniques are still relevant to D2C?
- How do broader digital ecosystems widen opportunities, augment strategic capabilities, more closely link revenue with quality, increase consumer scrutiny, and exacerbate or expose the fundamental, psychological tensions of health/wellness categories?
- How has the pandemic acted as a driver of consumption in health/wellness categories, as well as investments in those categories?
- How are beauty and health/wellness categories blurring even further during the pandemic?
- How might D2C enable the healthier reformulation of products as well as greater supply chain transparency?
- As popular notions regarding “self-care” and “wellness” are both commodified and re-conceptualized, within an inherently unwell environment (the global pandemic), how should brands and retailers try to connect with people?
- How do real or perceived “vice-virtue” product categorizations, or recategorizations, factor into pricing strategies?
- How should D2C health/wellness brands with resource constraints, or insufficient market share, leverage digital testing, analytics, effective market segmentation, and agile methodologies in order to achieve growth?
- How are these same brands adapting to overcome the disruptions in their supply chains and brick-and-mortar retail?

For more information about this report, visit: <https://www.policy2050.com/reports/d2c-health-wellness>

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