



Considerations for Selfcare Innovation

2025 AESGP Annual Meeting

June 4, 2025
Warsaw, Poland



A changing consumer landscape



Understanding key consumer cohorts



Millennials

Born between 1981 and 1996

23%

OF THE GLOBAL POPULATION

Millennials are now the largest adult cohort worldwide

Often referred to as **'the wellness generation'** with this cohort **exercising more**, focusing on **healthy eating** and **smoking less**.

MORE FORMALLY EDUCATED

40%

of people in the UK in their 30s have graduated from university.



Generation Z

Born between 1996 and 2010

70%

Are involved in a social or political cause

61%

Say they prefer realistic online content

36%

Choose natural foods to avoid artificial ingredients



Gen Z identity has been shaped by the digital age, climate anxiety, a shifting financial landscape, and COVID-19.

Known as **'digital natives'** — The first generation to grow up with the internet.

Uniting characteristics



Holistic health

The pursuit of health and wellness is a 24/7 commitment



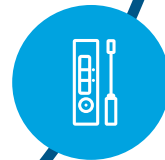
Values matter

Highly socially aware and values driven



Tech savvy

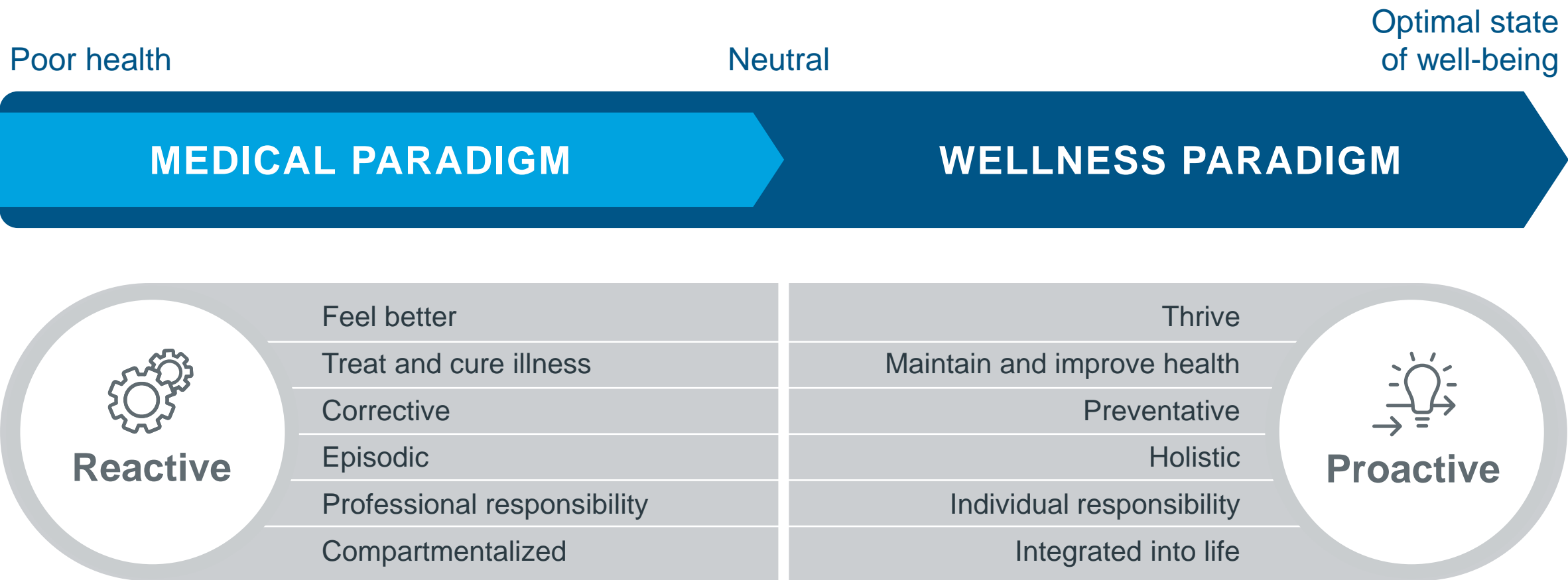
The first generations to grow up with technology



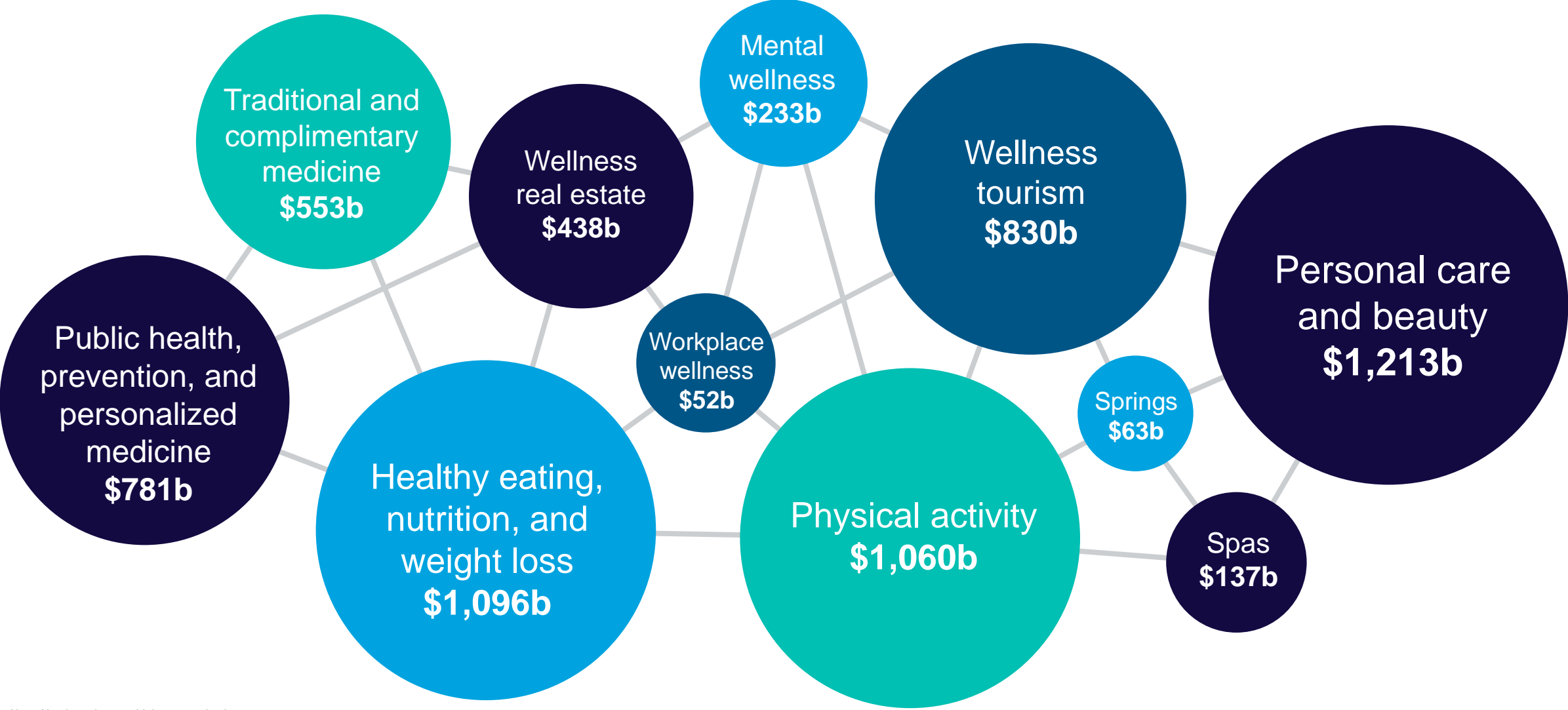
IRL

Yearning for real-life, tangible experiences

The evolving wellness paradigm

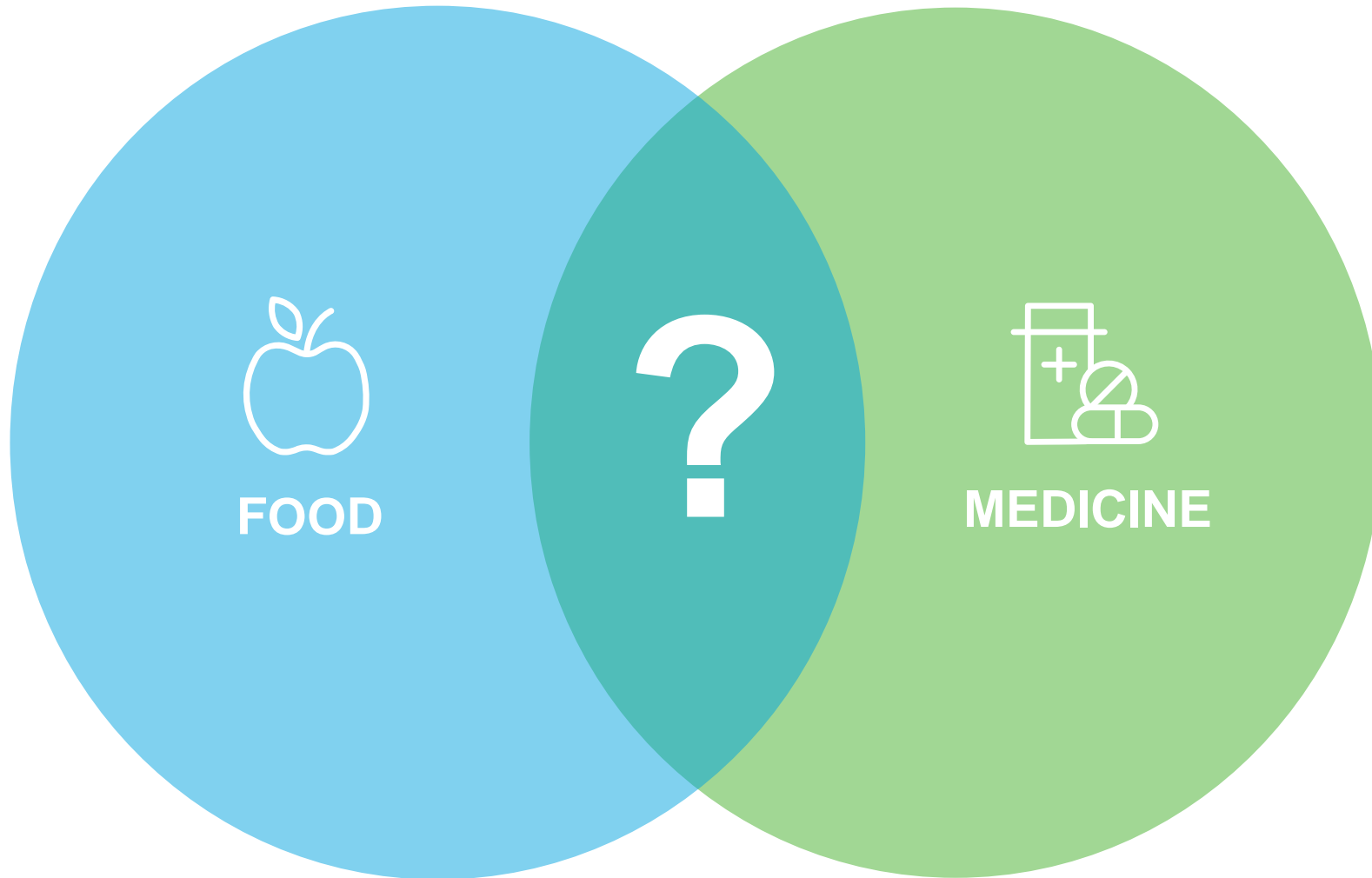


Creating a \$6.3 trillion global wellness economy



Note: Numbers do not add due to overlap in sectors.
Source: Global Wellness Institute
Considerations for Selfcare Innovation — June 2025

Meaning traditional category boundaries are blurring

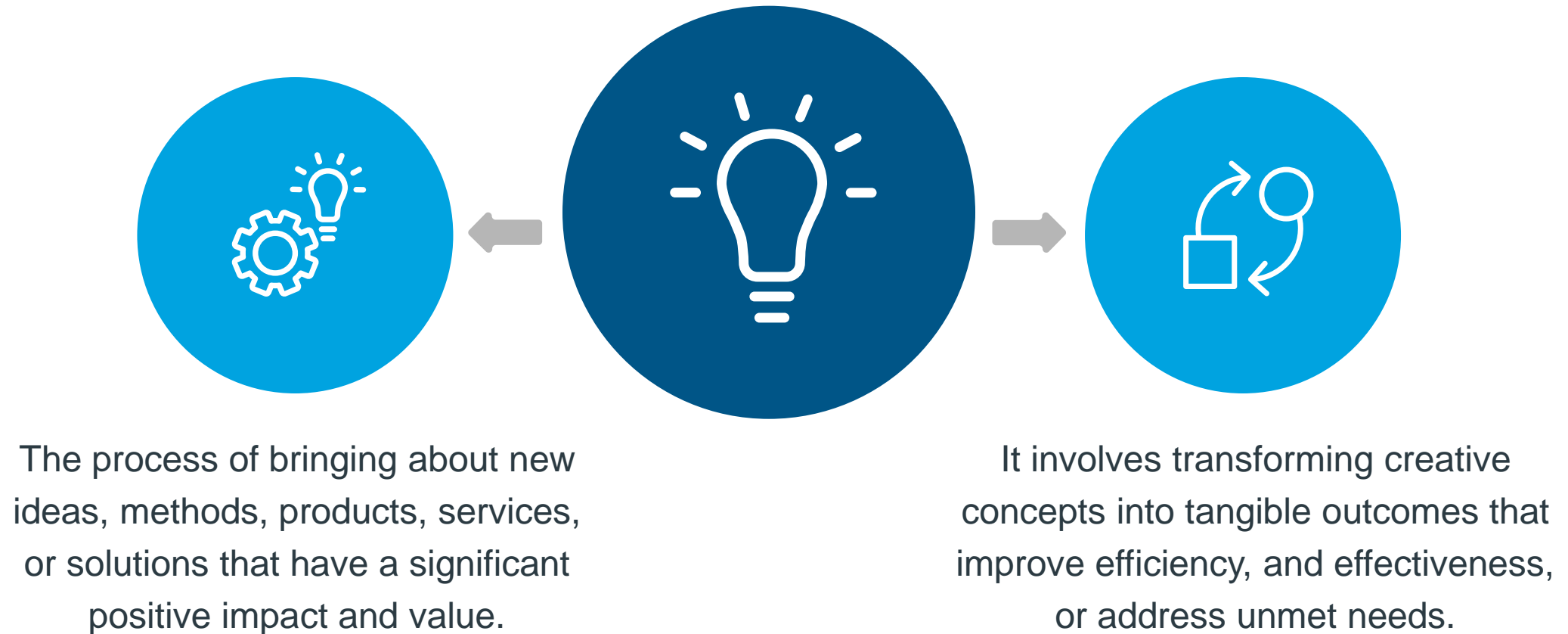




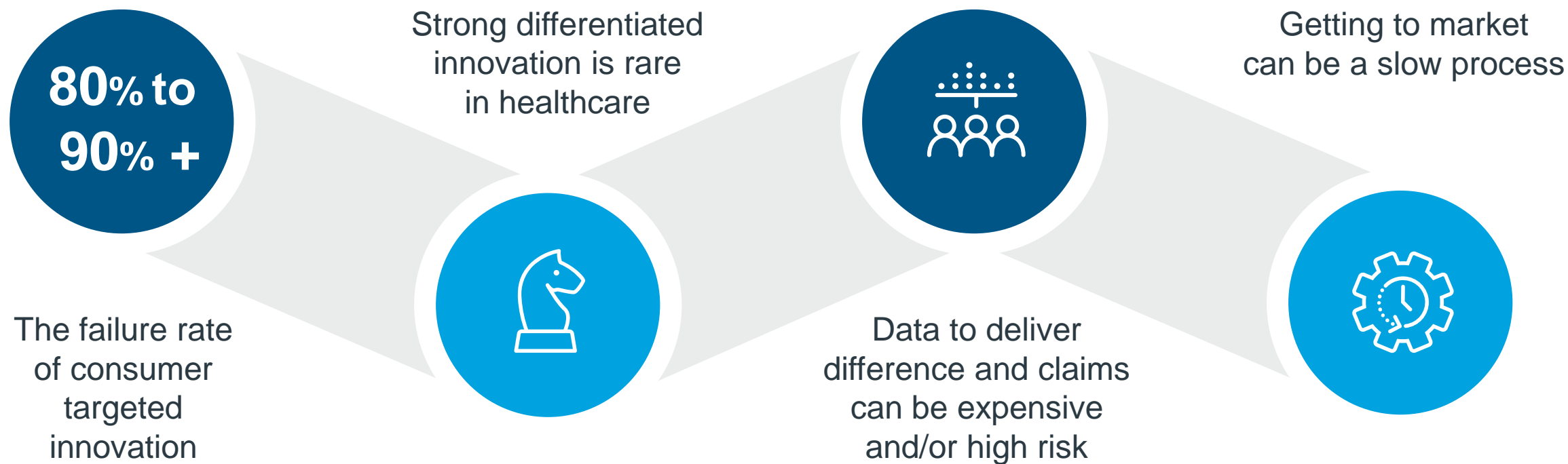
Innovation In an evolving consumer landscape



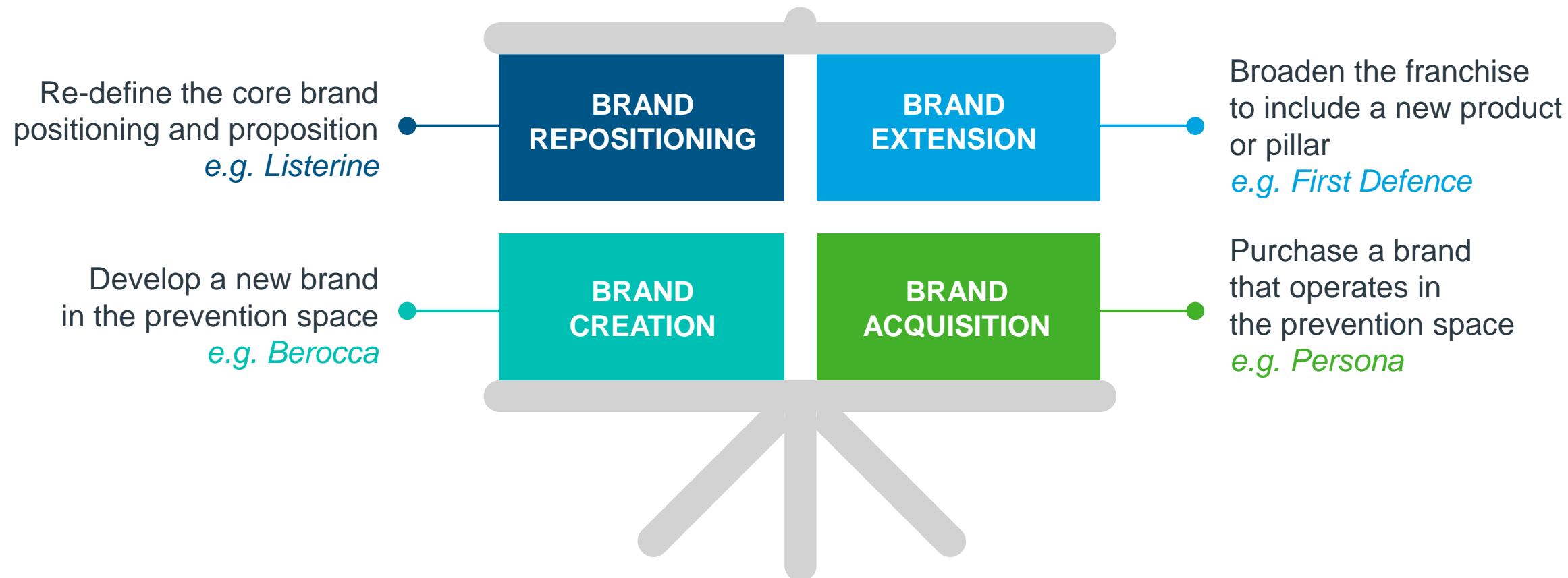
What do we mean by innovation?



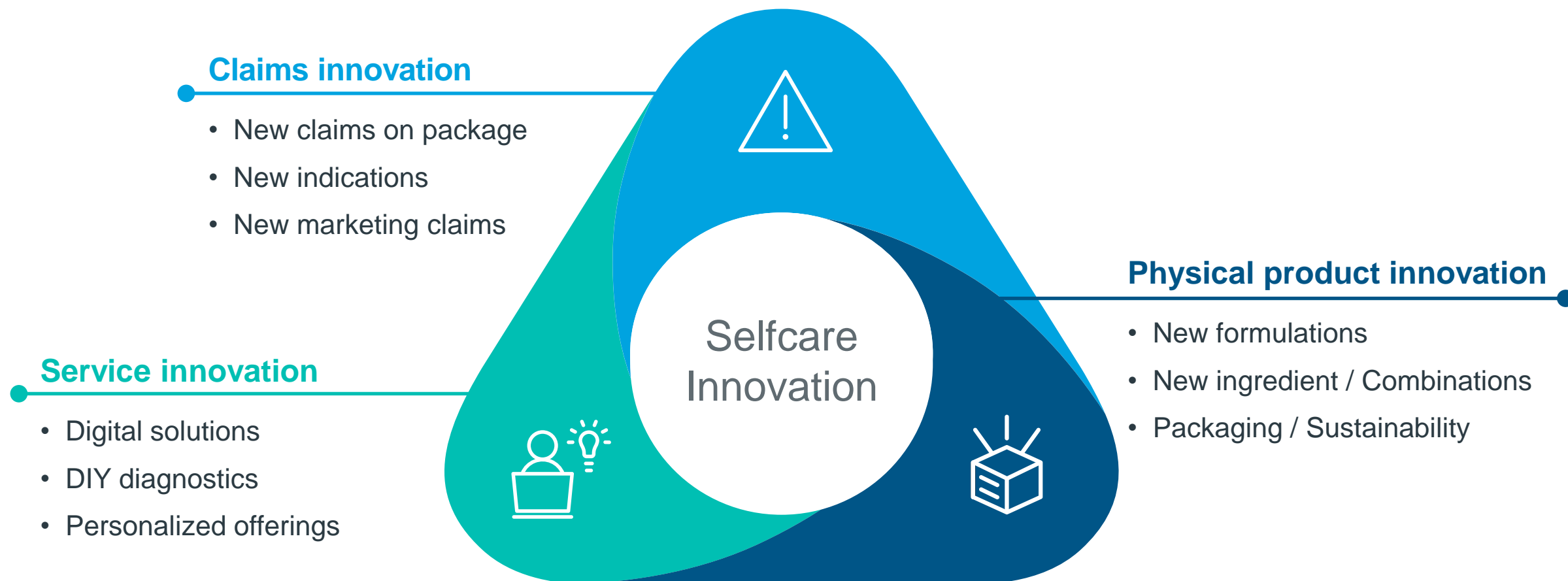
Innovation in healthcare is an ongoing challenge



Strategic options for innovation



A smart innovation mix is required to be consumer relevant



Consumer-centricity and evidence is key: Benefits need to be meaningful and relevant

Success criteria — Key issues to consider

Real life relevant



Socially conscious



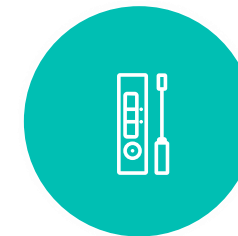
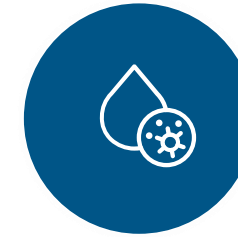
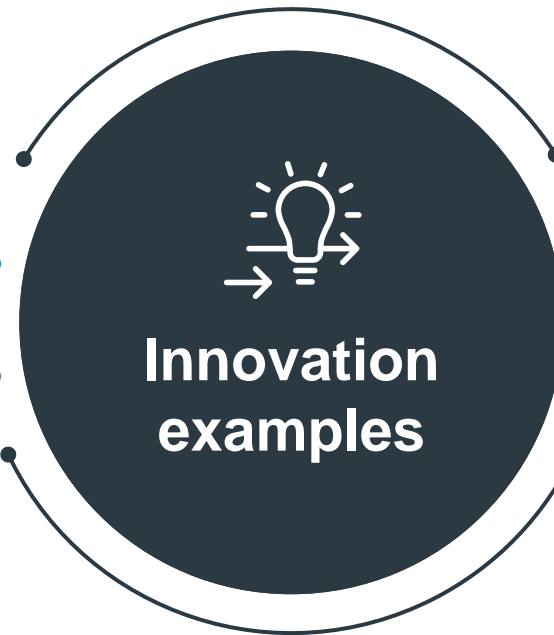
Maintain/Improve health

Nourished

3D printed gummies tailoring a personalized blend of micronutrients to a consumer's individual health needs

The What Supp Co

VMS patch delivery system to support a range of consumer needs and conditions



Nespresso and Vital Collagen

Bundling coffee and collagen to create a new morning ritual for skin, hair and nails support and healthy bones and muscles

Radox Health

Home test kits for a range of health issues from gut biome health, hormone/fertility health to breast and ovarian cancer risk

Socially conscious — Aspiring leaders in sustainability

OTC medicines

1

CABINET HEALTH:

A US based B CORP on a mission to eliminate plastic by providing a range of refillable medicines through Target, CVS & Amazon.

Probiotics

2

SEED HEALTH

A probiotic brand from a microbial sciences company that holds sustainability at its core to improve human and planetary health.

Personal hygiene

3

WHO GIVES A CRAP

B CORP 100% sustainable/recycled toilet rolls delivered direct to your door. 50% of profits donated to help everyone gain access to clean water and a toilet

Innovation — A recipe for success?



Build distinctive
consumer relevant
brands



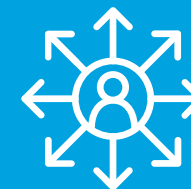
Invest more in
fewer innovations



Invest in brand
specific, consumer
centric, experience-
led research



Build UNIQUE
'personalized' user
experiences that
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Explore digital
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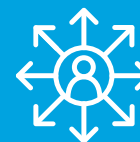
Innovation — A recipe for success?

Build UNIQUE 'personalized' user experiences that enhance the journey

Invest in brand specific, consumer centric, experience-led research



Explore digital services, support and partnerships to build distinctive, holistic solutions



Build distinctive consumer relevant brands



Invest more in fewer innovations





Thank you



Contact Us



Thomas Heil

*Vice President, Germany –
IQVIA Consumer Health*

thomas.heil@iqvia.com



David Gray

*Head of Healthcare Brand Strategy -
IQVIA Consumer Health*

david.gray@iqvia.com