



COMPASS MARKETING

# 7 Consumer Insights Impacting Health & Wellness Brands in 2026

And the Rising Brands Embracing Them

# About Us



At Compass Marketing, we uncover high-impact opportunities that drive long-term value. Whether it's a new platform, or new-to-the-world innovation, we find the opportunities unique to your business.



We craft insight-driven, brand-inspired ideas, validated and quantified using our agile consumer research approaches.



We elevate — or create — brand relevance by re-framing the value proposition, target or messaging.



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# Reimagine What's Possible

Each year, we summarize the consumer insights that we foresee driving growth in health and wellness. The annual list is a custom summary following over a decade of immersion into the sector.

Throughout the year, we focus on seeking out the gaps, the areas of possibility where new ideas are born and new growth is found. We use a unique blend of time-tested and novel approaches to focus on what matters most for our clients.

We hope these insights too will help you reimagine what's possible for your brand.



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# OUR CLIENTS

From start-ups to  
billion-dollar brands.

They range in size.

But they share one  
common goal:

# GROWTH.



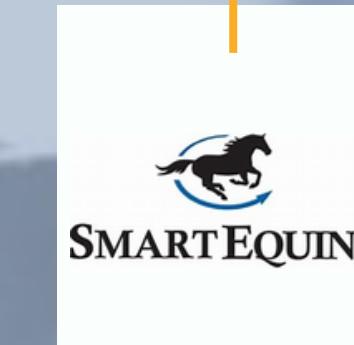
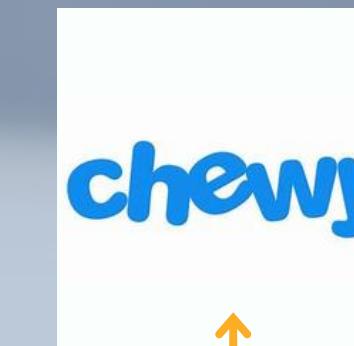
# OUR WORK HAS IMPACT

We are proud when our work contributes to our clients' success.

These clients were acquired (or received a majority investment) shortly after working with us.

*Acquirers/Investors*

*Clients*



# THEMES FOR 2026



Gut Health 2.0-The Age of the Microbiome



Mental Energy & Emotional Regulation



Pet Wellness Gets Human-Grade Intelligence



A New Era of Self-Directed Wellness



The Longevity Lifestyle



Metabolic Recalibration



Women's Health Expansion

# GUT HEALTH 2.0-THE AGE OF THE MICROBIOME

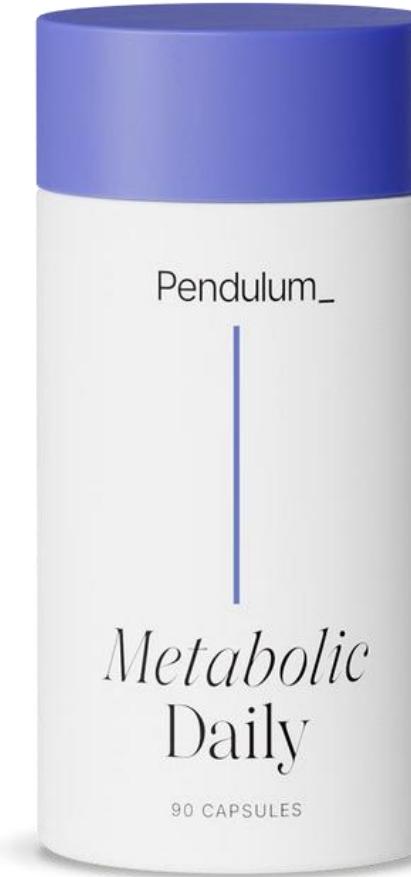
**TREND:** Gut health is becoming one of the most influential drivers of whole-body wellness. Consumers now recognize the microbiome's role in immunity, metabolic function, emotional balance, skin clarity, and hormone stability. Interest in gut-supportive foods, targeted probiotics, low-bloat fibers, and microbiome-aligned snacks is accelerating as science makes these solutions more consumer-friendly and accessible.

**INSIGHT:** About 70% of the body's immune system is located in the gut. Brands that connect gut improvements to visible outcomes such as better energy, improved mood, smoother digestion, and reduced inflammation will stand out in the next phase of microbiome-driven wellness.

People want gut solutions that deliver tangible benefits. A growing number of people use wearables, at-home test kits, and symptom-tracking apps to better understand how digestion impacts daily performance and mood. This shift elevates gut care from a niche concern to a foundational health behavior that shapes choices across food, supplements, beauty, and mental well-being.



# GUT HEALTH BRANDS INNOVATING FROM THE INSIDE



## Pendulum

Combines targeted probiotic strains to support digestive health, immune function, and metabolic processes by breaking down carbs and sugars for improved energy and overall gut balance.



## Beekeeper's Naturals

A propolis-powered, 3-in-1 gut health supplement that combines prebiotics, probiotics, and postbiotics to nourish beneficial bacteria, support digestive regularity, and strengthen the gut lining for balanced microbiome function.



## Belli Welli

A range of gut-health-focused products, primarily daily fiber supplements and flavored drink mixes with added probiotics, electrolytes, and collagen in powder, gummy, and on-the-go packet formats, alongside curated bundles and branded merchandise.

A woman with curly hair is smiling and laughing while working out. She is wearing a blue tank top and is holding a pair of dumbbells. In the background, there is a blue water bottle and some exercise equipment. The background is slightly blurred.

# Challenge:

How can your brand support whole-body wellness through improved solutions?

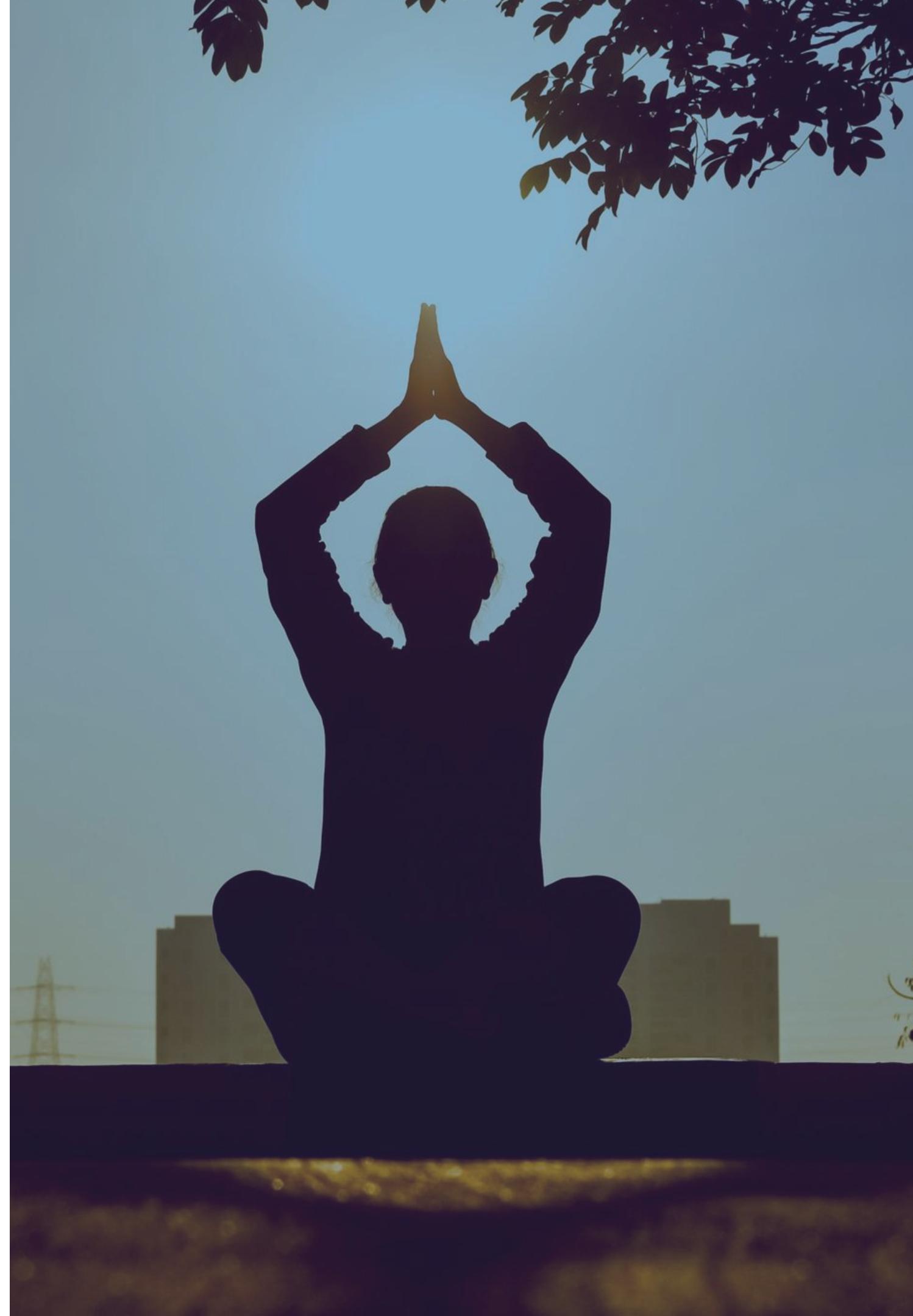
# FINDING CLARITY AND CALM IN AN OVERSTIMULATED WORLD

**TREND:** People seek small, consistent practices to support clarity and emotional resiliency. Digital overload, constant multitasking, remote work pressures, and rising anxiety create demand for solutions supporting daily balance. Mental well-being is shifting from a reactive behavior to a proactive lifestyle priority.

**INSIGHT:** More and more Americans are experiencing mental fatigue. In fact, the National Health Service even has its own acronym: TATT (Tired All The Time).

Consumers want subtle and reliable support. This is leading to an increased interest in breathwork tools, calming botanicals, soundscapes, and neurofeedback to help reduce overwhelm and support focus.

Digital overload intensifies the need for self-regulation, as Americans check their phones an average of 144 times per day, making micro-moments of calm more essential than ever.



# MENTAL ENERGY & EMOTIONAL REGULATION



## NuCalm

NuCalm is a patented, clinically proven neuroscience-based system (delivered primarily through a mobile app) that helps users naturally reduce stress, improve sleep quality, and enhance recovery and focus without drugs by guiding the brain and body into a balanced, relaxed state.



## TRIP by Calm

Calm's TRIP Mindful Blend products are lightly sparkling botanical beverages formulated with calming ingredients like lion's mane, ashwagandha, L-theanine, and magnesium to support relaxation and mental wellbeing, created in partnership with the Calm app and often paired with a free Calm Premium subscription.



## Eden's Garden

A passive, artisan-made ceramic essential oil diffuser that uses porous clay and a wick to naturally disperse your favorite aromatherapy scents throughout a room without heat, electricity, or water, creating a calming ambiance in spaces up to about 500 sq ft.

A scenic landscape featuring a calm lake in the foreground, a dense forest of evergreen trees in the middle ground, and a range of mountains with snow-capped peaks in the background under a cloudy sky.

**Challenge:**  
How can your brand create and  
connect with consumers during  
micro moments of calm?

# PET WELLNESS GETS HUMAN-GRADE INTELLIGENCE

**TREND:** Pet owners increasingly view their animals as full family members and expect the same level of precision, personalization, and preventive care they receive themselves. This shift is driving interest in microbiome testing, DNA insights, real-time activity and stress tracking, functional supplements, and personalized nutrition that adjusts with age and need.

**INSIGHT:** Pet separation anxiety has become a major concern among pet owners. Recent research indicates that many pet parents now prioritize their pets' emotional well-being just as much as their physical safety. This trend highlights the need for developing new tools to address behavioral issues in real time.

Gut health is another critical area of focus for pets. Younger generations, particularly millennials and Gen Z, are especially concerned about their pets' digestive health. This suggests a potential increase in demand for products and services related to gut health in the coming years.

Advances in technology, diagnostics, and functional nutrition are establishing a new standard for what is considered "smart care" for pets.



# PET WELLNESS GETS HUMAN-GRADE INTELLIGENCE



## Basepaws DNA Test

This at-home DNA kit uses a simple cheek swab to analyze your dog's genetic makeup, delivering a detailed breakdown of breed composition, physical traits, and potential health risks across 300+ breeds and 280+ genetic health markers. Results help owners better understand their dog's unique biology and make informed care decisions.

## Honest Paws Calming CBD

The Honest Paws Calm collection offers a range of calming CBD-based products formulated with organic full-spectrum hemp oil and other natural ingredients to help dogs manage stress, maintain relaxation, and support emotional balance during anxiety-triggering situations.

## Sense 1

The Coton's AI Sense 1 is a smart, AI-enabled wearable collar that continuously monitors a dog's vital signs—including heart rate, respiration, and body temperature—and delivers real-time health insights to a connected app, helping owners and vets track well-being and detect early warning signs of health issues.

A woman with curly hair, wearing a dark t-shirt and light blue jeans, sits on a sandy beach. She is looking down at a smartphone held in her hands. A brown and white dog is standing next to her, looking towards the camera. The background is a blurred view of the beach and ocean. A white rectangular box with a thin black border is overlaid on the upper left portion of the image, containing the text.

**Challenge:**  
What are ways your brand can stay  
relevant as pet wellness evolves?

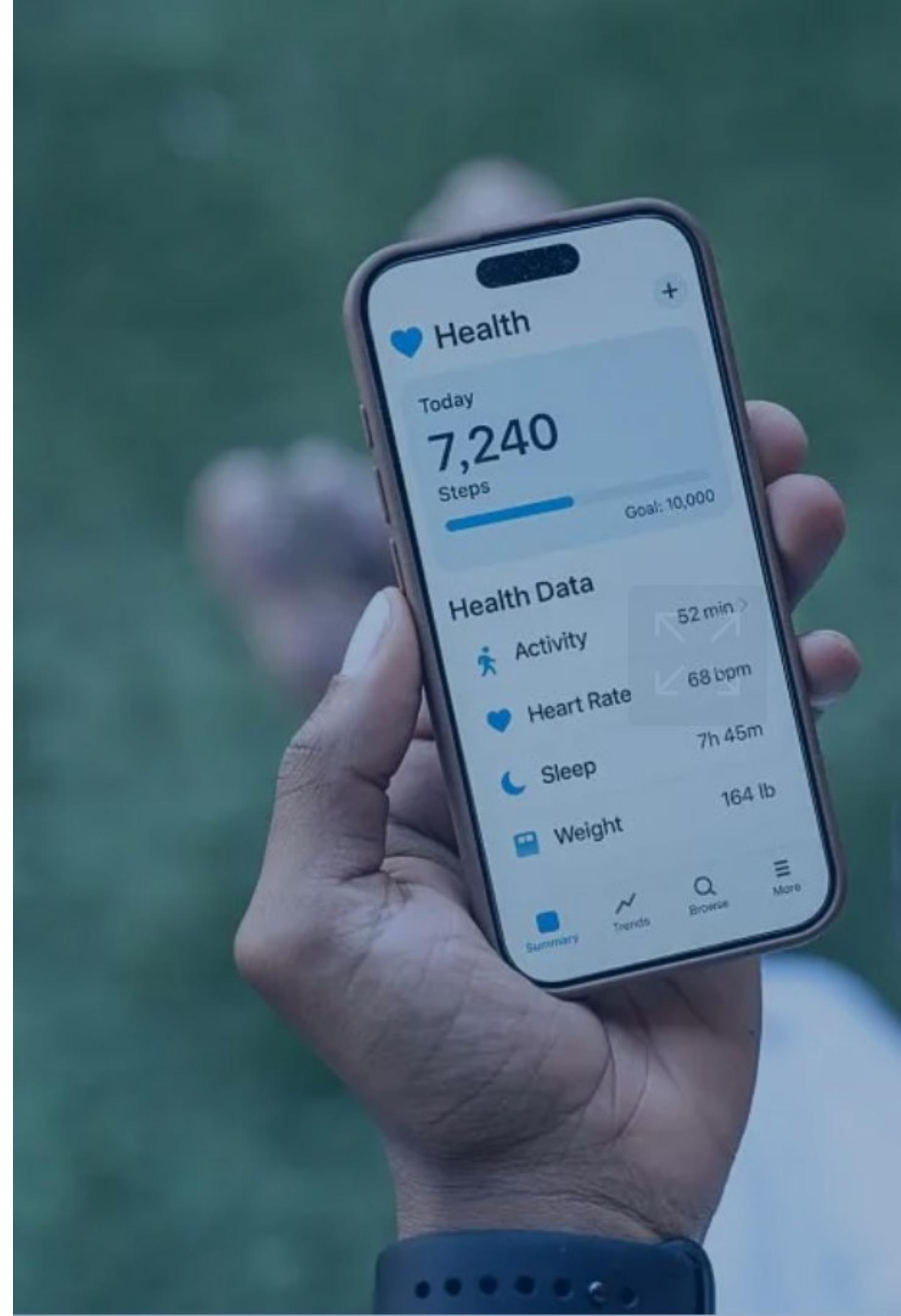
# A NEW ERA OF SELF-DIRECTED WELLNESS

**TREND:** Consumers are shifting from reactive healthcare to proactive self-management. More Americans are tracking biomarkers, sleep, stress, and metabolic signals with connected devices, while also building at-home wellness ecosystems that support recovery, strength, sleep quality, and emotional balance. Health technologies that once belonged in clinics, such as continuous glucose monitors, hormone testing, red-light therapy, and recovery tools, are now common in the home.

**INSIGHT:** Consumers are seeking greater visibility into their health and want support that integrates seamlessly into their daily lives. Currently, over 40 percent of U.S. adults regularly use digital health tracking tools. The at-home diagnostics category is expanding as individuals look for quicker answers without the hassle of hard-to-schedule clinical appointments. Among the most frequently searched at-home testing kits are those for food intolerances and blood tests.

Additionally, more than one in four households owns a wellness or recovery device, highlighting the rapid emergence of homes as personalized health hubs. People are looking for tools that offer meaningful feedback, easy interpretation, and simple steps they can take right away.

Health coaching enhances the relationship between users and their devices. Brands that provide clear information and user-friendly routines will be perceived as empowering and trustworthy.

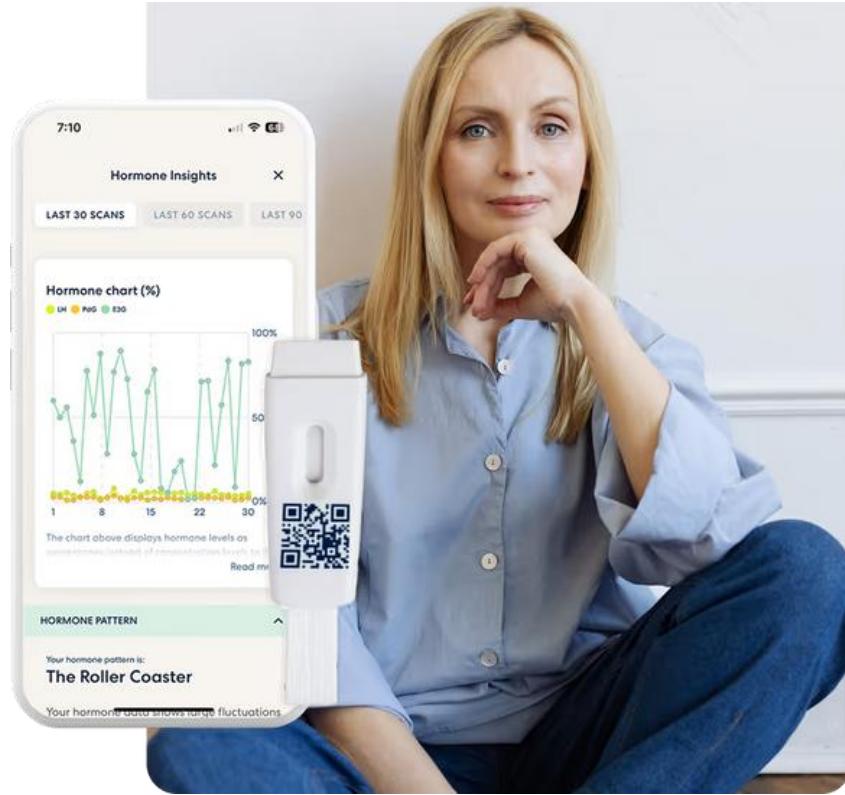


# SELF-DIRECTED WELLNESS



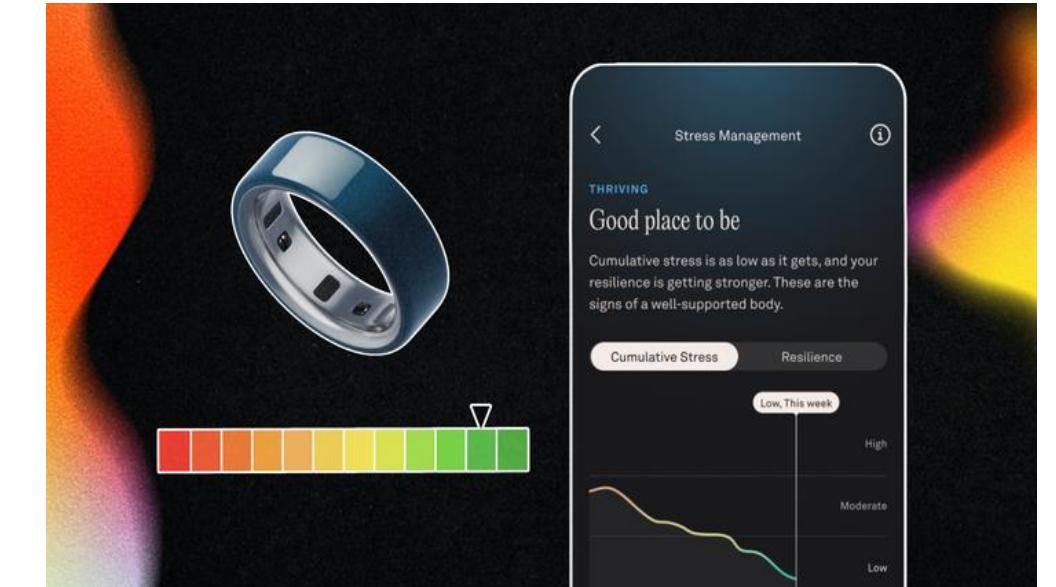
## Lumen

Lumen is a handheld metabolic tracker that measures your breath to determine whether your body is burning carbs or fats, then delivers personalized nutrition and lifestyle guidance through an app to support metabolic flexibility, energy balance, and wellness goals, adapted for women's unique metabolic shifts such as those across the menstrual cycle and into perimenopause.



## Oova Hormone Kit

An at-home hormone tracking system that uses daily urine test strips and a companion app to measure key hormone metabolites (estrogen, progesterone, and luteinizing hormone) and deliver lab-grade insights into your hormonal patterns as you navigate perimenopause, helping you understand symptoms, cycle changes, and inform treatment decisions.



## Oura Ring

Oura Ring's new Cumulative Stress feature provides a weekly score that tracks how physiological strain builds up over the past ~31 days by analyzing metrics like sleep quality, heart rate variability, temperature regulation, and activity, helping users spot long-term stress trends and prioritize recovery before burnout or health issues arise.

A woman with curly hair is sitting cross-legged on a light-colored carpet, meditating with her eyes closed. She is wearing a light blue long-sleeved shirt and light blue leggings. In the foreground, the edge of a silver laptop is visible on the carpet. The background features large windows looking out onto a green, leafy environment. The overall scene is calm and suggests a home setting.

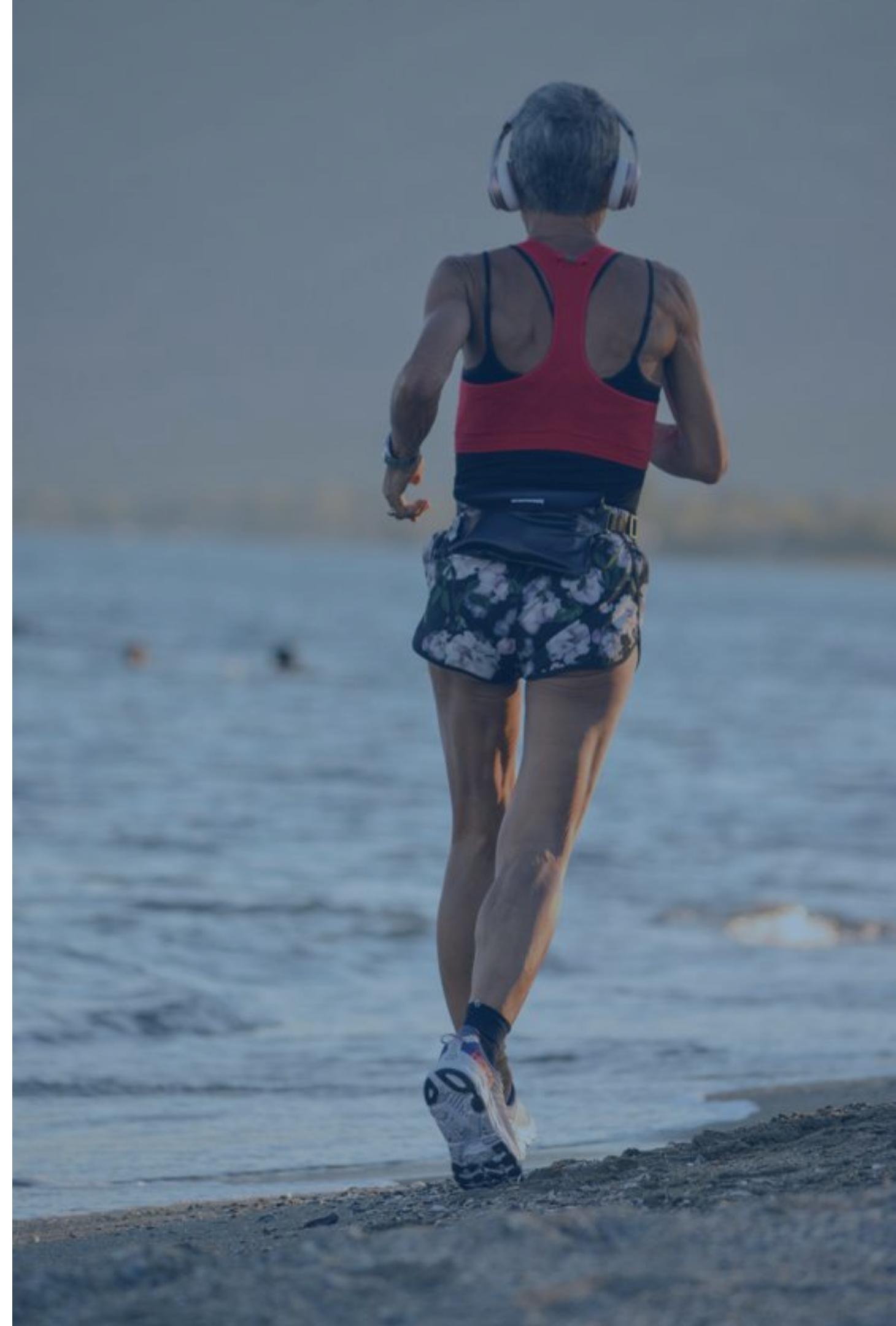
**Challenge:**  
How can your brand help  
consumers take control of their  
health from home?

# THE LONGEVITY LIFESTYLE TAKES ROOT

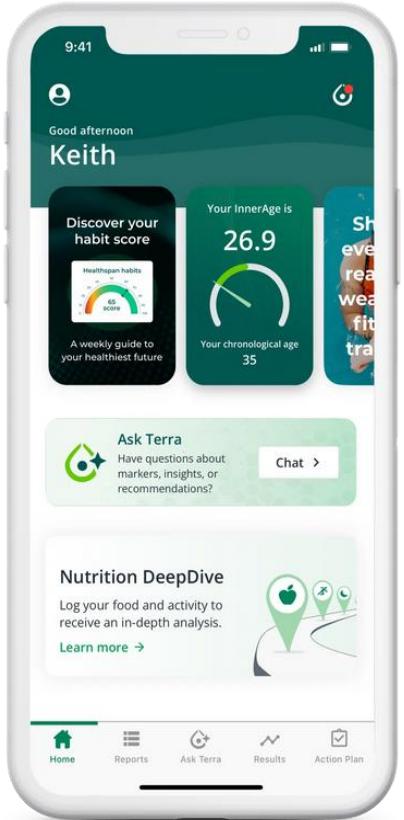
**TREND:** Many Americans are now committed to a lifestyle that promotes longevity, focusing on enhancing the quality of their lives rather than just the number of years. They are actively investing in their well-being, nurturing both their inner health and outer appearance.

**INSIGHT:** Approximately 82% of older adults have adopted at least one new behavior in the past year in an effort to improve their health. About half of these individuals have started eating a healthier diet or taking vitamins and health supplements.

Consumers no longer see longevity as extreme or experimental. With 1 in 5 Americans expected to be over age 65 by 2030, people are seeking practical steps that help them stay active and mentally sharp well into older age. Daily strength work, anti-inflammatory foods, sleep improvement, recovery aids, and hydration strategies are becoming the foundation rather than the fringe. Brands that make healthy aging achievable and motivating will resonate deeply.



# THE LONGEVITY LIFESTYLE TAKES ROOT



## Inside Tracker

Inside Tracker is a personalized health optimization platform that analyzes your blood biomarkers, DNA, and wearable data to deliver science-backed insights and tailored recommendations for nutrition, exercise, supplements, and lifestyle changes designed to help you improve wellness, performance, and longevity.



## Elysium Health

A science-backed NAD<sup>+</sup> boosting supplement formulated with nicotinamide riboside and pterostilbene to help elevate cellular NAD<sup>+</sup> levels, supporting energy production, DNA maintenance, and healthy aging at the cellular level. Its formulation aims to sustain metabolic function and reduce age-related declines in cellular processes.



## Get A Drip

Get A Drip provides medically supervised IV vitamin drips and booster shots that deliver hydration and key nutrients directly into the bloodstream to support energy, immunity, and overall wellness. Treatments are personalized through brief clinical consultations.

A photograph of a beach with waves crashing onto the shore. The sky is blue with some clouds. The water is a deep blue. The sand is light-colored and has some small rocks on it.

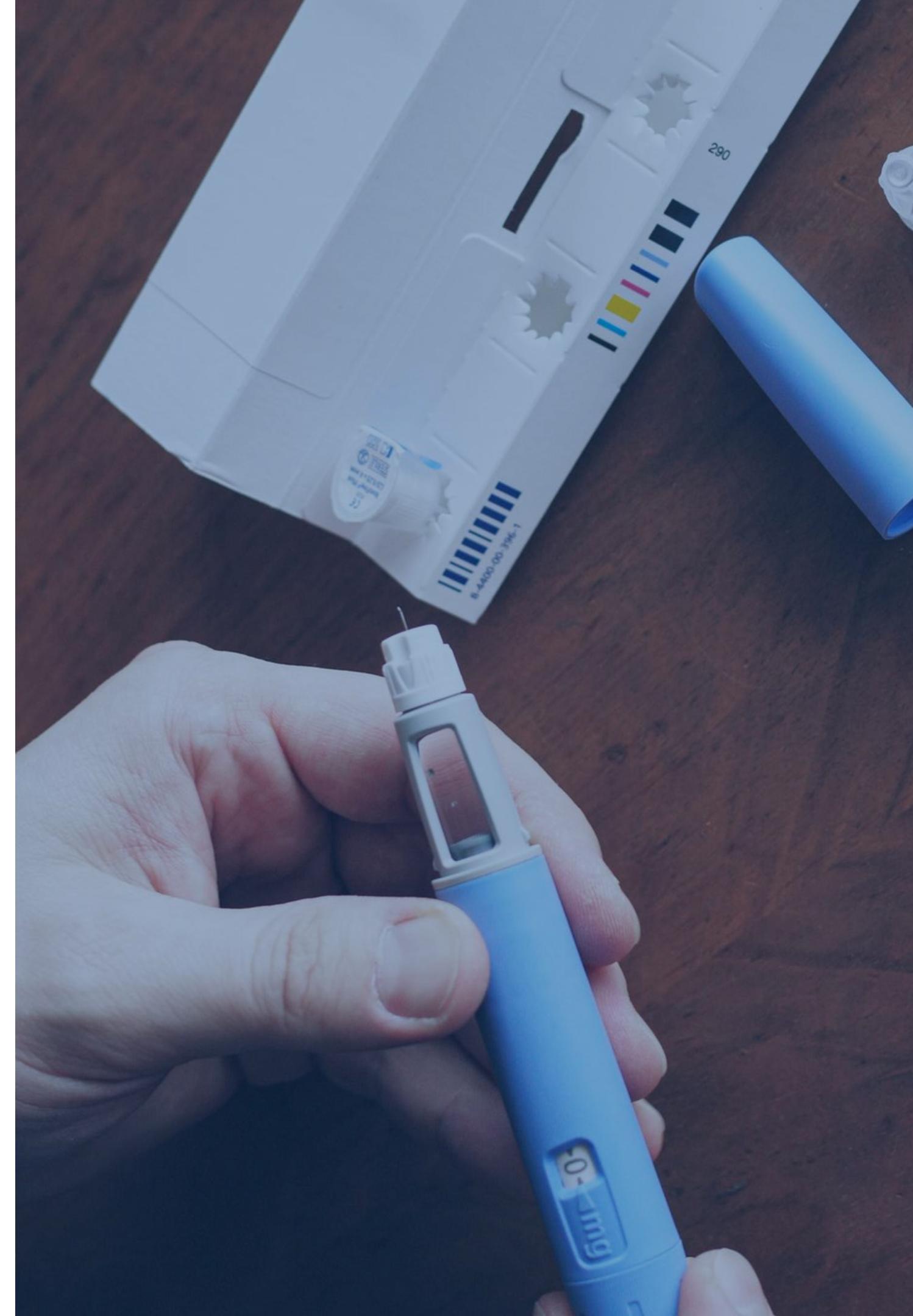
**Challenge:**  
How can your brand help people  
build achievable habits that  
support long-term vitality?

# METABOLIC RECALIBRATION BECOMES A LIFELONG STRATEGY

**TREND:** Consumers move toward long-term metabolic balance rather than short-term weight loss. Strength, digestion, protein intake, and nutrient density become core behaviors.

**INSIGHT:** People want routines that help them stay nourished, energized, and strong. GLP-1 users face unique metabolic challenges because reduced appetite often lowers daily nutrient intake. Many users cut total food consumption by 25 to 40 percent, increasing the risk of nutrient gaps. This is reinforced by the fact that 39 percent skip at least one meal per day due to limited hunger.

About 40% of the weight loss experienced by individuals taking GLP-1 medication comes from lean mass, including muscle. Approximately 80% of users are interested in trying food products specifically designed to meet their unique dietary needs. These changes are driving a growing demand for convenient food solutions that help stabilize energy, protect muscle, and support digestion.

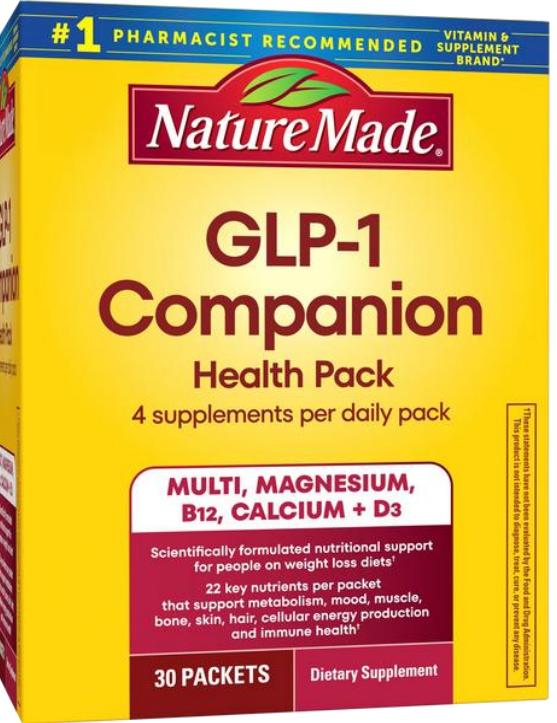


# METABOLIC RECALIBRATION



# Factor

Factor Meal Delivery is a subscription service that sends fresh, chef-prepared, dietitian-approved meals straight to your door that are ready to heat and eat in minutes, making nutritious eating more convenient without any cooking or prep. It offers customizable weekly menus across dietary preferences like keto, high-protein, vegan, and calorie-smart, and lets you pause, change, or cancel your plan at any time.



**Nature Made**

Nature Made GLP-1 Companion Health Pack is a daily nutritional support supplement with 22 essential vitamins and minerals packaged in easy-to-take packets designed to help fill nutrient gaps associated with weight-loss diets or GLP-1 medication use. Each packet combines a multivitamin with key nutrients like magnesium, vitamin B12, and vitamin D3 + calcium to support energy, mood, bone health, and overall



# Gainful

The GLP-1 Support Stack from Gainful is a curated nutritional bundle designed to support people using GLP-1 therapies by combining lean protein powder, electrolyte mix, daily greens, and digestive fiber to help maintain muscle, hydration, nutrient balance, and gut comfort while appetite and digestion shift.

# Challenge:

With more than 12% of Americans on GLP-1s, how can your brand support long-term metabolic balance in a simple, consistent way?

# WOMEN'S HEALTH ENTERS ITS EXPANSION ERA

**TREND:** Women's health innovation is expanding beyond menopause to address hormones, perimenopause, sexual wellness, and cycle-informed performance. Women now expect tailored solutions that reflect their real physiological needs.

**INSIGHT:** Every month, nearly 2 billion people around the world menstruate. By 2030, over one billion women are expected to enter perimenopause or menopause. With women making more than 80% of household healthcare decisions, it is time to listen.

Women want science-backed products that support real physiological needs. They look for solutions that improve confidence, energy, comfort, hormonal balance, intimate wellness, and emotional well-being across all life stages. They expect respectful design, clear benefits, and transparency.



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# WOMEN'S HEALTH EXPANSION

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## Lioness

The Lioness Smart Vibrator is a biofeedback-enabled personal massager that uses embedded sensors to measure pelvic floor muscle movements during use and visualizes that data in a companion app, helping users understand, track, and improve their sexual pleasure and orgasm patterns over time.



## Evvy Microbiome Test

The Evvy Vaginal Microbiome Test is an at-home, CLIA/CAP/CLEP-certified sequencing kit that analyzes 700+ bacteria and fungi from a single vaginal swab to deliver a comprehensive profile of your vaginal microbiome and its links to symptoms, fertility, and overall reproductive health.



## CORA

The Cora Period Care line includes a range of clean, organic cotton-based menstrual products — from tampons and absorbent pads to liners, reusable menstrual cups, and discs — designed to offer comfortable, reliable protection for different flows and preferences while avoiding harsh chemicals and supporting body confidence.

A woman in a leotard and tights is captured in mid-air, performing a split leap on a sandy beach. She is positioned on the left side of the frame, with her body angled away from the viewer. Her arms are extended to the sides, and her legs are split, with one leg pointing forward and the other back. The background is a warm, golden sunset over the ocean, with the horizon line visible in the distance. The overall mood is one of movement, balance, and grace.

**Challenge:**  
What opportunities can your brand  
explore to support women's whole-  
life wellness in a credible way?



# SEE WHAT OTHERS DON'T

We hope that these insights will help you reimagine your brand. We encourage you to reflect on the challenge prompts as potential springboards for growth.

- What areas of opportunity are most relevant for your brand?
- Do you have the resources (people, time, money) to achieve the desired growth?
- What are the next steps that the team should take to action new growth?

We know that every situation is different. If you would like to talk about yours, then please reach out.

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