The New *Wellness* Ecosystem

DATA COLLECTED IN PARTNERSHIP WITH PHRONESIS PARTNERS | **FEBRUARY 2026**

Contents

Cover image courtesy of Six Senses London

Foreword

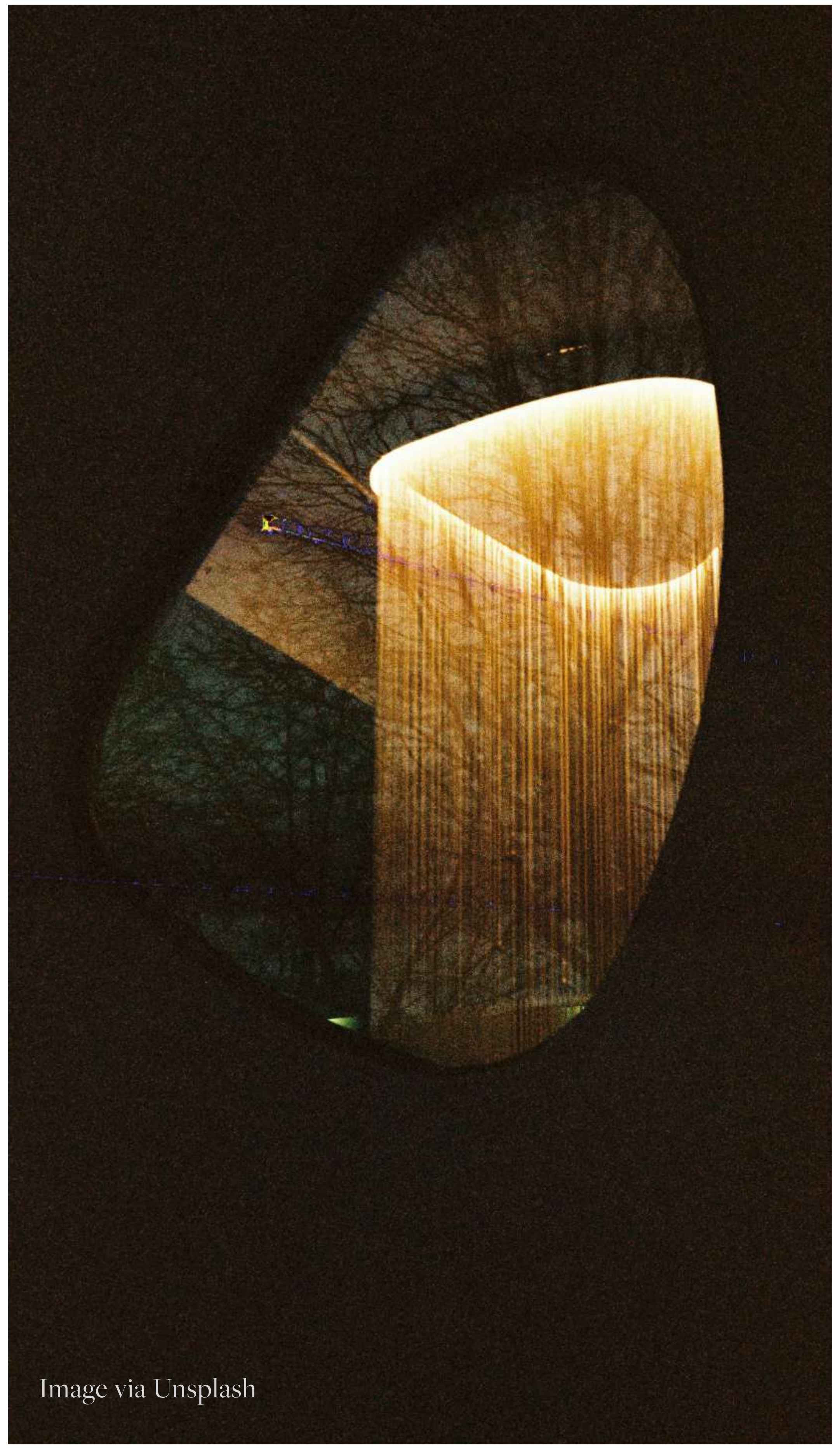


Image via Unsplash

Wellness is an unstoppable $6.3 trillion industry, forecast to grow +9% by 2028.* Defined by the Global Wellness Institute (GWI) as: 'the active pursuit of activities, choices, and lifestyles that lead to a state of holistic health', its expansion is driven both by the proliferation of its sub-categories and by consumers' shifting priorities.

As demand and differentiation within the category accelerate, Karla Otto's dedicated Insights, Beauty & Wellness and Hospitality teams unite to examine the growing luxury end of the funnel. Drawing on a proprietary survey of aspirational and HNWI consumers across France, the US and the UK, the findings reveal a new luxury wellness mindset, one that challenges assumptions and highlights nuanced demographic differences.

Bolstered by qualitative insights by in-house and cross-category experts, Karla Otto offers its view of the opportunity at the intersection of wellness, hospitality and luxury. As the consumer continues to place focus on self-optimisation and experience, the industry finds itself at an inflection point; one ready for innovation and growth. Our report unpicks the fundamental signals of change and the brands leading the charge, with strategic insights that reveal the new ecosystem of wellness.

CONTACT US TO LEARN MORE ABOUT OUR SERVICES.

Methodology

LUXURY MARKETS (UK,FR,US)

03

DATA POINTS

10k+

HNWI SURVEYED

300

EXPERT VOICES

16

This report is grounded in a multi-layered research approach combining internal expertise, quantitative consumer insight, and qualitative expert validation. By integrating these perspectives, we were able to explore the convergence of wellness and hospitality through both an industry and a consumer lens, and identify the strategic implications for luxury brands seeking to enter (or lead) this space with confidence.

CROSS-DISCIPLINARY EXPERT FORUMS

At the foundation of this study were a series of structured, open-forum conversations bringing together senior experts from across our Beauty & Wellness, Hospitality, and Insights teams. By uniting these three disciplines, we examined how wellness is expanding beyond traditional product and service models into holistic, experience-led ecosystems. These collaborative sessions allowed us to map emerging intersections between wellness and hospitality, identify white-space opportunities, and frame the strategic questions shaping the future of wellness marketing and communications strategy.

LUXURY CONSUMER RESEARCH

To ground our hypotheses in consumer reality, we conducted a joint survey between Karla Otto and Phronesis Partners.
Phronesis Partners led the primary research, including questionnaire refinement, programming, translations, data collection, and quality assurance. The study surveyed 300 luxury consumers aged 18+ across the United States, United Kingdom, and France, each of whom reported spending a minimum of $2,500 on personal and/or experiential luxury in the past 12 months.
Analysis and interpretation of the findings were developed by the Karla Otto team based on the jointly owned dataset.

IN-DEPTH EXPERT INTERVIEWS

To validate, challenge, and contextualise our findings, we conducted over 20 hours of in-depth interviews with industry leaders, brand founders, and editors spanning beauty & wellness, hospitality and luxury. These conversations enabled us to contrast consumer sentiment with market realities, stress-test early conclusions, and enrich the analysis with real-world expertise and forward-looking perspectives.

With thanks to our data partners, Phronesis Partners.

The Outlook: Where Wellness is Headed

Image credit: One&Only via Kerzner International

60%

OF CONSUMERS PLAN TO INCREASE THEIR WELLNESS SPEND OVER THE NEXT 12 MONTHS

+84%

GEN Z CONSUMERS ARE MORE LIKELY THAN OTHER GENERATIONS TO INCREASE SPEND ON WELLNESS

+36%

MALE CONSUMERS ARE MORE LIKELY THAN OTHER GENDERS TO MAKE WELLNESS A BIGGER PRIORITY

Data based on survey conducted by Karla Otto x Phronesis Partners – see methodology for details.

The Outlook: Where Wellness is Headed

The growth potential of wellness within the luxury sector is clear: 60% of survey respondents state that they plan to increase their wellness spend over the next 12 months. This momentum is driven by far more than the volume of products and services now available: a confluence of psychological, social and political forces has created the ideal conditions for wellness to flourish.

The Covid-19 pandemic, and the consequential awareness of personal health and the importance of community, is just one driver. Another is digitisation and technological acceleration, both a catalyst and a counterforce for wellness. While digital platforms have increased access to information, community and commerce, they have also fuelled a backlash against digital overconsumption, particularly social media and its impact on mental health – one of the core pillars of wellness.

For many consumers, wellness has come to represent the antithesis of 'online', with recent movements around 'offline living' promising a cognitive reset. With this tension in mind, it's perhaps ironic that the most digitally attuned generation is also the most primed to shape the future of wellness. Our research shows that Gen Z is 84% more likely than other demographics to increase its spending in this category. 'They put wellness very high up on their priority list,' says Jess Cruel, Editor in Chief of Allure and SELF. 'In my experience, they put it before work, finances – they protect their wellness unlike any other generation.'

Technology has become a contemporary component in the pursuit of wellness. Advancements in AI, wearables and the launch of tools such as ChatGPT Health are equipping consumers with instant access to personalised health insights. This is reshaping who (and what) we trust, especially in regions such as the US, where healthcare systems remain complex and economically uneven. The supposed democratisation of health offered by such tools is often undermined by questions around reliability, credibility and trustworthiness.

While technology creates access, it also puts claims of scientific credentials under scrutiny. The sheer scale and volume of content, coupled with the rise of influencer marketing, has left consumers not only digitally fatigued and overwhelmed (thus seeking more holistic practices), but also wondering what is claim and what is fact. As a result, scientific validation is fundamental in shaping a new era of wellness products and experiences.

While women have historically been the primary audience for wellness, our survey reveals a cohort of men prioritising it. Men are +8% more likely to increase their spend and +36% more likely to make wellness a bigger priority in their lifestyle choices. 'Men have recently undergone a form of emancipation,' states Werz. 'Activities once limited to functional exercise have expanded into a broader engagement with wellness. Today, men are increasingly integrating massages, detox programs and other holistic practices into their lifestyles.'

With wellness now perceived as a growing lifestyle priority, it's beginning to reshape broader luxury categories. Fashion, in particular, which has stagnated somewhat recently, is increasingly rubbing shoulders with wellness. 'We know that 60 million customers have left the luxury market*,' says Karla Otto's Chief Brand Officer, Elisabetta Tangorra. 'These consumers are thinking twice about spending €5,000 on a bag, sometimes opting to buy second-hand instead, and investing their money elsewhere.' For Tangorra, wellness is increasingly perceived as that 'elsewhere': a category that delivers long-term emotional, physical and social return. Our findings back Tangorra's sentiments: 64% of consumers who said they intend to spend more on wellness in the next 12 months said they would do so by increasing their overall 'luxury' budget, including both experiences and material purchases. This dispersion of spending power is blurring the boundaries between luxury fashion and wellness: brands like Coperni have already started to enter the space with new biotech textiles woven with a patented synbiotic blend of probiotics and prebiotics, which the brand claims help rebalance the microbiome and reinforce the natural skin barrier.*

Despite a new set of drivers propelling the industry forward wellness is deeply embedded in human anthropology. Rituals and regimes designed to preserve health, vitality and beauty can be traced back to the ancient Egyptians and Greeks.

'Today, the pressures of modern living are intensifying the need for self-optimisation, in whatever form that may take,' says Lissy Von Schwarzkopf, Chief Business Officer at Karla Otto. 'For brands to meaningfully connect with consumers today, they must engage with their wellbeing, whether mental, physical or spiritual.' Yet, in an increasingly saturated wellness landscape, opportunity is matched by heightened skepticism and a widening trust divide. Wellness's deep roots in the human condition make it a category rich in potential, but one that demands authenticity, sensitivity and credibility. Its significance to people's lives makes it commercially powerful – but also culturally fragile. Its potential, and future, depend on how well it is communicated.

On the next page, we offer a generational lens to map out the evolving language, priorities and perceptions across different demographics, based on the intricacies that make each segment unique.

Image via Unsplash

Meet the New Wellness Consumer

BIO

Meet the 'individualist' wellness seeker. Their #1 priority is self-care and #2, mental health. They represent an opportune market: they are 84% more likely to increase spend in this category.

MOST LIKELY TO:

Use technology in pursuit of wellness. They are 77% more likely to trust wellness benefits if they're technology-backed.

LEAST LIKELY TO:

They are 8% less likely than other generations to travel for wellness, preferring to stay local and seek out daily rituals.

WHERE TO REACH THEM

#1 YouTube and Instagram

BIO

This generation sees wellness holistically, prioritising physical fitness and health, with mental health a top priority. 27% of them plan to increase their spend across wellness.

MOST LIKELY TO:

Bombarded by content every day, this generation is sceptical and attuned to ads. They are more likely to trust recommendations from friends and family.

LEAST LIKELY TO:

They are 44% less likely to trust celebrity affiliations for wellness, instead preferring peer-to-peer or expert advice.

WHERE TO REACH THEM

#1 Friends & Family Recommendations

BIO

This generation seeks 'balance and harmony' and a 'sense of calm and relaxation'. This group remains a core target for wellness, with over 1/4 looking to increase spend.

MOST LIKELY TO:

Moreso than any other generation, 38% of this cohort will actively seek wellness experiences through travel and hospitality.

LEAST LIKELY TO:

They are 36% less likely to prioritise community, instead opting for that remote, one-in-a-lifetime experience.

WHERE TO REACH THEM

#1 YouTube

BIO

This cohort broadly sees wellness as a one-off 'treat', rather than a daily ritual. Only 9% plan to increase spend across wellness.

MOST LIKELY TO:

See wellness as a beauty investment and spend on traditional treatments. Although they are the most likely generation to invest in 'optimisation'.

LEAST LIKELY TO:

Trust technology to inform their product preferences. However, they are more likely to watch long-form content around wellness products and experiences.

WHERE TO REACH THEM

#1 Brand Website

Image via Unsplash

The Dynamics of Trust

01

CHAPTER 1

The Dynamics of Trust

With AI in nascent development and political instability worldwide, consumer concern regarding misinformation is at an all-time high.* Audiences are turning to new sources to help them navigate this era of uncertainty, and following the Covid pandemic, the fragility of consumer trust is particularly pertinent for wellness.
When products, practices and experiences directly affect physical and mental health, some consumers apply a far higher standard of proof and reliability – one led by science and expert voices. As a result, traditional influence in this sector is giving way to narrower, more credible forms of authority: peer recommendation, specialist knowledge or lived experience.

And, in this quest for tangible facts and results, the appeal of wearables grows – but can they be trusted?

Image courtesy of BLOK

CHAPTER 1.1

Science is a Founding Pillar of Trust

> 'Brands are hiring third-party labs for double-blind clinical trials. It's not enough for a brand to state they're science-backed, it needs to be legitimate for consumers.'
>
> GEORGINA GRAHAM, BEAUTY & WELLNESS EXPERT

1/3

OF CONSUMERS LOOK FOR SCIENTIFIC BACKING TO TRUST THE WELLNESS BENEFITS OF A PRODUCT OR EXPERIENCE

Science is one of the foundations of health, wellness and beauty, and an undeniable driver of trust. While it shapes how products and services are formulated, it also substantiates claims into facts. In an era of constant information and opinion, wellness brands become reliant on evidence to earn trust.

While plenty of brands label themselves 'science-backed' through their own sponsored studies, many consumers remain sceptical. Both Georgina Williams, a plastic surgeon and co-founder of the Montrose Clinic in London, and Georgina Graham, a beauty & wellness expert, spoke about 'third-party verification' as essential to establish true authority with audiences. Williams, who regularly administers injectables, notes that this scrutiny is particularly critical within the space, as demand for tweakments and 'prejuvenation' continues to rise*. Her patients increasingly request specific treatments popularised on social media, but Williams refuses to use them unless she can independently evaluate their safety and efficacy herself.

Globally, consumers are increasingly knowledgeable about the science behind wellness, thanks to information being so readily available online. Science has always been important in skincare, but the social media explosion has given voice to consumers who candidly and publicly question what's in their products. Amy Keller Laird, Senior Vice President of Beauty & Wellness at Karla Otto notes how a group dubbed as 'skintellectuals' don't just want 'to know which ingredients a product contains, but what version of that ingredient, how the ingredients work together, whether the formula has been clinically studied, and are those clinical study results graded by machines or conducted by a third party?' These are all questions brands will need to answer to earn trust.

CHAPTER 1.1

Case Study: 4 Brands Leaning on Science

SKINCEUTICALS

As the quest for longevity and better skin health intensifies, SkinCeuticals' is placed at the forefront of ingredient innovations and science-backed formulas. But science has been a hallmark of the brand ever since it was founded in 1994 by Dr. Sheldon Pinnell – now the brand consistently calls on medical professionals such as dermatologists, aesthetic doctors and skincare experts to educate consumers on its formulations and reinforce credibility.

SKINBETTER SCIENCE

Skinbetter Science leverages biotech and scientific innovation to develop proprietary ingredients, clinically tested in randomised, dermatologist-led studies. By combining expert evaluation with advanced machine grading, the brand establishes a rigorous, evidence-based foundation for credible, science-led claims.

AWVI

Founded in 2023 by Alexander Werz, AWvi is a science-led brand setting new standards in supplements and skincare. Established as a collective of experts from the medical, pharma and biotech industries, the brand develops patented formulas that are rigorously trialled and independently clinically tested to validate tangible results.

DR. IDRISS

Led by board-certified dermatologist Dr. Shereene Idriss, the brand is anchored in credibility and transparency. Through myth busting videos on socials, she's become known as the #PillowtalkDerm, amassing a global community of 3M followers.

CHAPTER 1.2

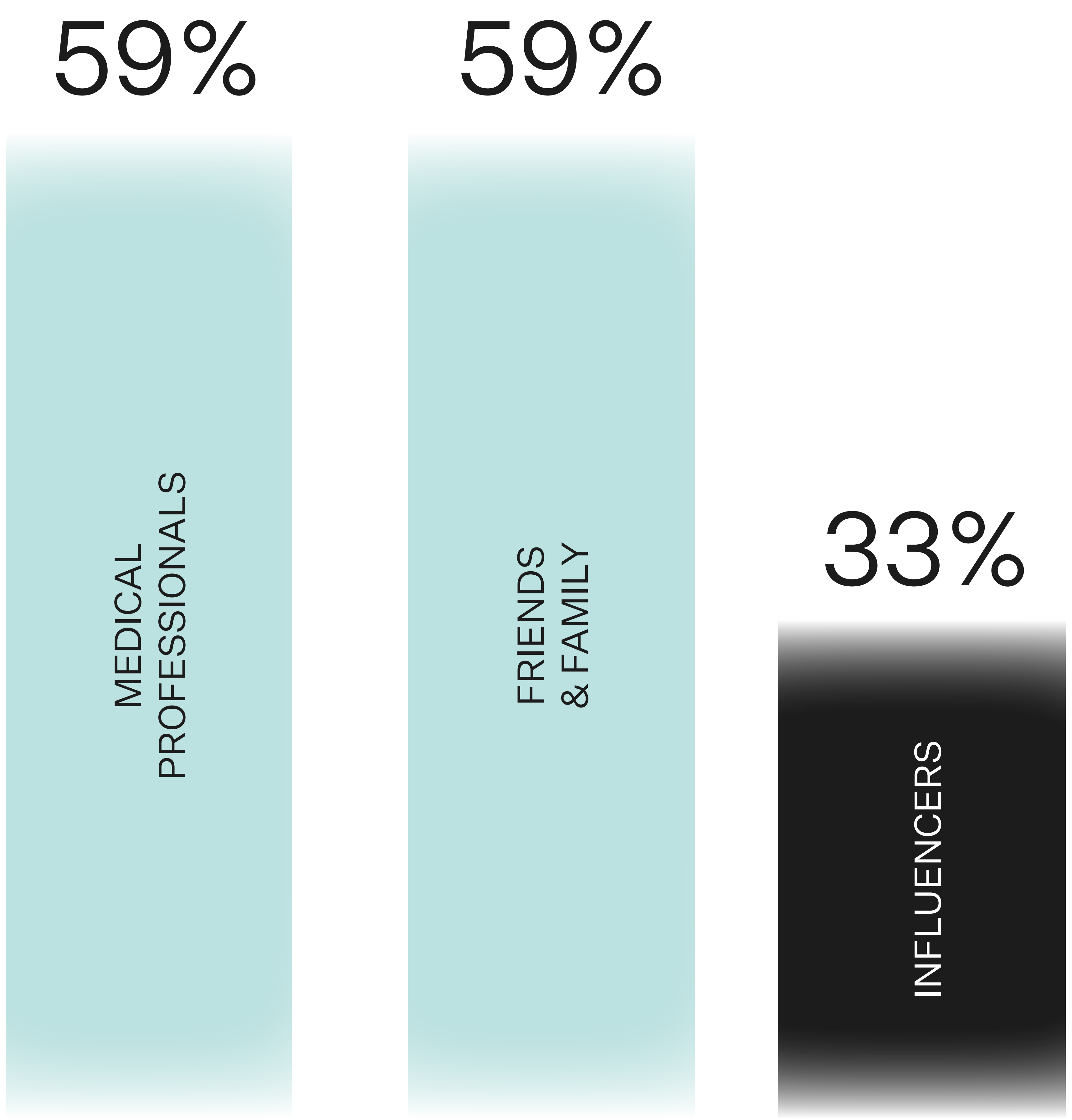
The New Influence: Experts & Cosmetic Chemists

Audiences have evolved to become more critical when it comes to product and brand endorsements. They are increasingly literate in social media marketing, and sensitive to promotions that feel phony or misaligned with a public figure's persona: only 16% said they trusted celebrity affiliations to validate wellness benefits.

With an audience more literate and scrutinous than ever, many brands have responded by pushing 'hero' ingredients to meet the specific needs of consumers. However, when clinical trials fail to keep pace with marketing deadlines, some products become promoted and endorsed without scientific backing. Our experts spoke about the potential harm of some peptide injections* – particularly those lacking clinically approved credentials but still tutorialised by TikTok users and amplified by influencers.

Still, influence in the wellness space is adapting. 'Audiences are more sophisticated in their approach to Wellness,' says Karla Otto's Von Schwarzkopf. 'And there are different ways that a brand can work with celebrities. It's about staying true to the nature of your brand.'

Who would you follow for new wellness products and experience recommendations?



Data based on survey conducted by Karla Otto x Phronesis Partners – see methodology for details.

Two Experts To Know

This is where the expert influencer comes in. While dermatologists have saturated the scene for the past five years, Keller Laird points to the rise of cosmetic chemists: 'They can explain ingredients, delivery systems and composition in a way that's both engaging and deeply informed,' making once-technical terms like 'skin barrier' part of the social media conversation. 'The reality is, 10 years ago a cosmetic chemist would have only had the opportunity to be quoted briefly in a monthly magazine, whereas today they can post daily content to both their existing followers as well as people who discover their content on the [Instagram] Reels tab,' says Kristie Dash, Head of Beauty Partnerships at Instagram.

'Cosmetic chemists can explain ingredients, delivery systems and composition in a way that's both engaging and deeply informed.'

AMY KELLER LAIRD, SENIOR VICE PRESIDENT OF BEAUTY & WELLNESS, KARLA OTTO

Charlotte Palermino

A licensed aesthetician with her own brand, Dieux, and a large social media following, Charlotte Palermino uses humour and plays up her relatable personality to speak about skincare ingredients and trends across the industry, outlining what really changes skin and what goes beyond hype.

Ron Robinson

With a career that includes work for La Mer, Lancôme and Hailey Bieber's Rhode, on top of his own line called BeautyStat, American chemist Rob Robinson is a trusted voice to debunk myths via his explainer videos.

CHAPTER 1.3

Can Wearables be Trusted?

One core principle of luxury holds true across the wellness sector: personal is premium. An increasing number of consumers are turning to data tracking for bespoke results about their overall health. Wearables, which track health metrics such as sleep quality, blood sugar levels and heart rate, serve the practice known as 'biohacking'. This has become a fixture of contemporary culture, amplified a few years back by a post by Kim Kardashian which turned into a viral 'sleep challenge'.* In 2025, ŌURA was high on Gen Z Christmas wishlists*, proof that the hype hasn't died down.

Yet there is a tension at play: while bespoke products and services are highly sought after, confidence in the AI behind many of these offerings varies. Many wearable systems on the market – such as Fitbit*, Whoop*, Apple Watch* or ŌURA* – harness machine learning models to store and interpret data. This is fuelling consumer concern: reports show that 63% of consumers globally do not trust AI with their personal data.*

Image via Unsplash

2.5x

FEMALE CONSUMERS ARE MORE LIKELY TO INVEST IN WEARABLES

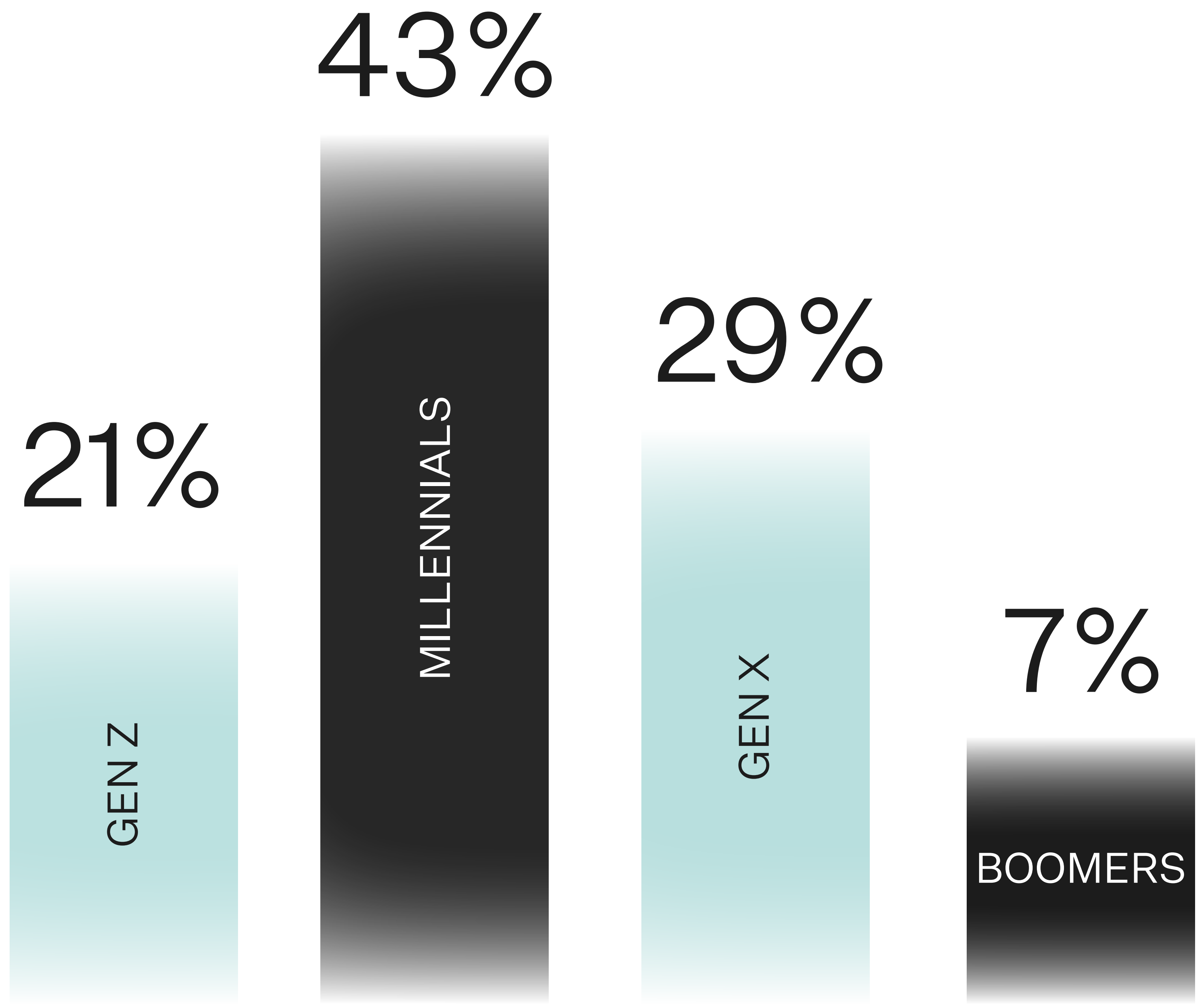
2x

MILLENNIALS ARE 2X MORE LIKELY TO INVEST IN WEARABLES THAN OTHER GENERATIONS

Consumers find themselves at a crossroads: Allure's Cruel notes how the state of the healthcare system in the US means many are turning to AI, such as the recently launched ChatGPT Health. In women's health especially, our experts suggest that wearables could provide valuable solutions. Women's health is historically under-researched, which is linked to many women experiencing unsatisfactory treatment from healthcare providers and leading to a desire to take control of monitoring their own health.* In fact, our data shows that female consumers are 2.5 times more likely to invest in wearables; Keller Laird notes how, among these female respondents, '[there are] Millennials within the fertility range and then Gen X in the menopause range. Female interest in wearables hits two major milestones of the reproductive cycle, but there remain concerns around sensitive data going into the wrong hands.' Indeed, trust in governments is severely low in regions covered by our survey.* For companies to earn trust, they must meet consumers with transparency in how they handle personal data.

The market for wearables proves that, despite uncertainty, demand for tech-enhanced wellness solutions is strong: the wearables market was valued at around $87 billion in 2025 and is projected to grow to more than $96 billion in 2026.* To build and maintain consumer trust, brands must take care to play to their strengths.

Generational breakdown of respondents who said they would invest in wearables:



Data based on survey conducted by Karla Otto x Phronesis Partners – see methodology for details.

CHAPTER 1.3

Case Study: The Body Scan

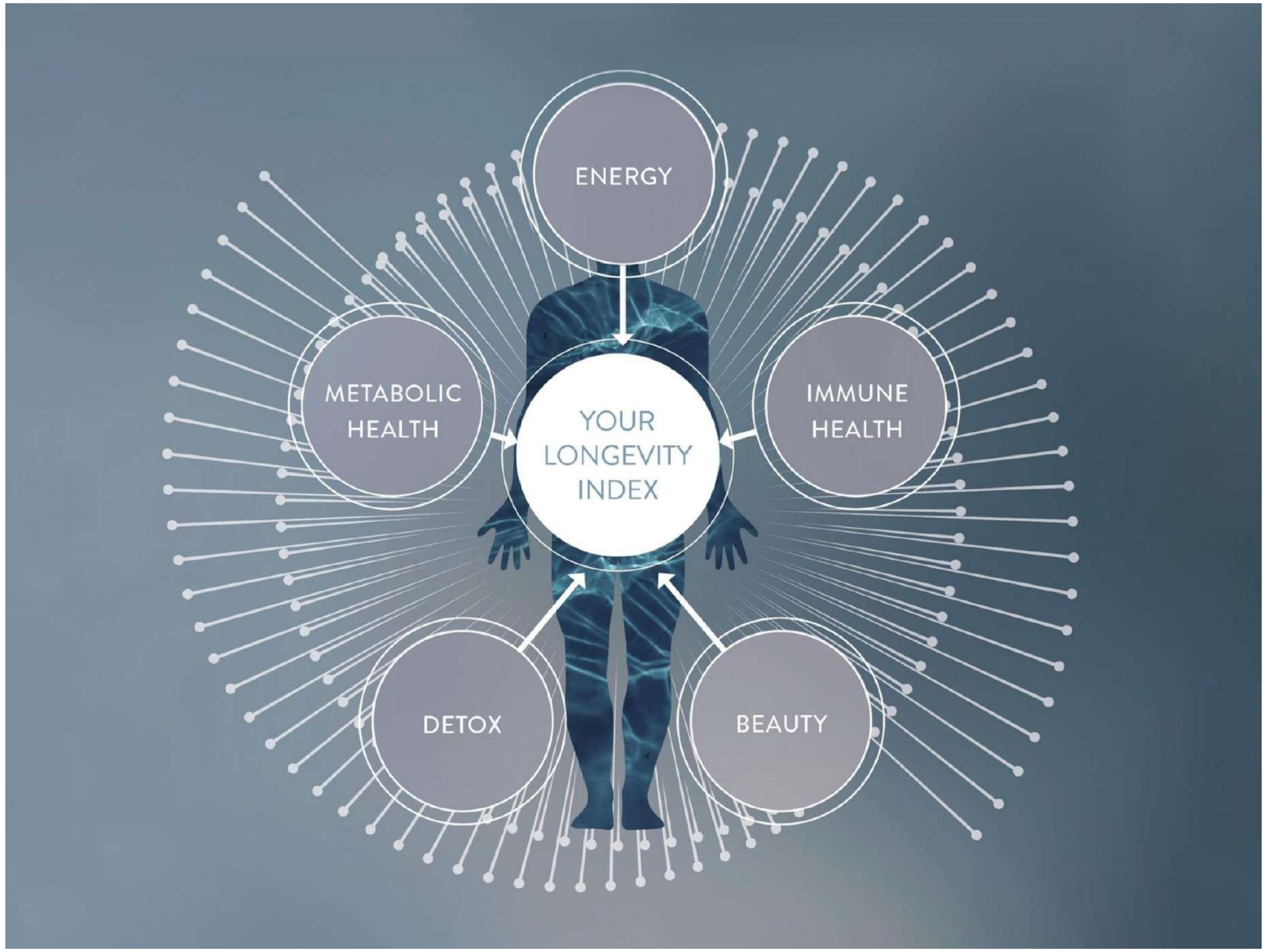
Nothing embodies biohacking, optimisation and prevention more than the 360 body scans, currently sweeping through cosmopolitan cities like London, Stockholm and Dubai.

> 'As technology evolves, its real value lies in helping people better understand their own bodies, how they move, recover, sleep and fuel themselves, creating clarity in a space that has become increasingly crowded.'

MATTHEOS GEORGIOU,
PRESIDENT, SIRO AND RARE FINDS

THE NEKO HEALTH BODY SCAN

Founded in Sweden and operational since 2023, Neko Health has redefined the body scan, positioning preventative health as both accessible and aspirational. Grounded in the Hippocratic principle that prevention underpins medicine, the brand's scans have generated multi-year waitlists across Europe, with New York next in its sights.



ONE&ONLY ONE ZA'ABEEL'S LONGEVITY HUB

In Dubai, hotel One&Only One Za'abeel partnered with Clinique La Prairie to launch the Longevity Hub, which is centred around a three-step assessment using AI technology and wellbeing algorithms derived from Clinique La Prairie's 93 years of research. The results are then given to practitioners to inform their therapies, allowing data to guide, rather than replace, all-important human expertise.

Image via Unsplash

The Platforms for Discovery

02

CHAPTER 2

The Platforms for Discovery

In luxury wellness, discovery is becoming more intentional. Rather than being driven by speed or impulse, it is shaped by platforms that allow space for curiosity, reflection and understanding. Short-form platforms like TikTok continue to dominate mass-market attention, yet trust tells a different story. According to our survey findings, consumers place greater confidence in long-form environments (such as lengthier videos, blogs and newsletters) when seeking knowledge, influence and guidance. Nearly half of respondents now discover new wellness products and experiences via YouTube, positioning long-form video as the category's leading discovery channel.

Wellness may surface through trends, but it is increasingly treated as a facet of lifestyle, one that feels personal, considered and worthy of time.

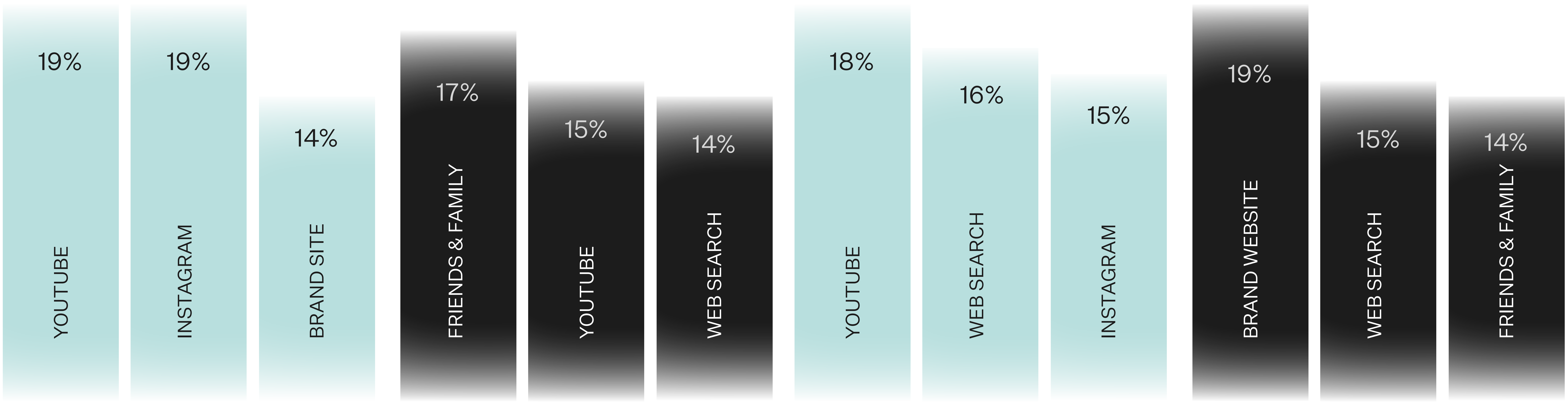
As wellness expands across beauty, hospitality and health-adjacent experiences, expectations have shifted. Inspiration alone is no longer enough. Whether exploring a skincare regimen, assessing a supplement protocol or considering a destination retreat, making decisions is grounded in education, credibility and context.
Short-form content may spark awareness, but it rarely provides reassurance. Long-form, by contrast, allows ideas to be explored in full, giving brands, founders and practitioners the space to articulate science, philosophy and intent with clarity.

Image courtesy of BLOK

CHAPTER 2

How Different Generations Discover Wellness: Search Engines vs. Social Feeds

TOP 3 DISCOVERY CHANNELS PER GENERATION



GEN Z
Least likely to discover via media: 2%

MILLENNIALS
Least likely to discover via forums: 3%

GEN X
Least likely to discover via forums/TikTok: Both 4%

BOOMERS
Least likely to discover via forums/TikTok: Both 3%

Data based on survey conducted by Karla Otto x Phronesis Partners – see methodology for details.

CHAPTER 2.1

The Power of Long-Form

‘Discovery is shifting from ‘what’s popular right now’ to ‘who do I trust over time’. Long-form platforms enable creators to become ongoing reference points, not one-off moments in a feed. When creators own their audience and engage directly, discovery becomes personal, consistent and community-driven, rather than dictated by feeds or algorithms.’

PREEYA GOENKA,
CHIEF CUSTOMER OFFICER, BEEHIIV

48%

OF LUXURY CONSUMERS FIND OUT ABOUT NEW WELLNESS PRODUCTS AND EXPERIENCES VIA YOUTUBE

One of the clearest signals of this shift can be seen in the rise of long-form newsletter platforms, most notably Substack and beehiiv. Once associated primarily with journalism and cultural commentary, these platforms are now destinations for wellness voices seeking to share expertise beyond the constraints of algorithms and trends.

With more than 20 million active readers and more than five million paying subscribers, Substack reflects a growing appetite for long-form engagement in beauty and wellness, as audiences choose continuity over immediacy in how they consume expertise and insight. Alongside platforms such as beehiiv, this points to a broader shift towards newsletter-first models that allow creators to build owned audiences, publish deeper thinking and develop independent media businesses beyond algorithm-driven platforms.

Drawing enough demand for its own leaderboard of ‘Top 25’ writers, the health and wellness category on Substack spans nutrition, mental wellbeing, longevity, movement and holistic lifestyle practices. At the same time, beehiiv gives wellness creators room for depth with longer dispatches that are grounded in lived experience and help audiences work through the questions that ultimately drive decisions. ‘Beauty and wellness are trust categories,’ says Preeya Goenka, Chief Customer Officer at beehiiv. ‘People aren’t just looking for inspiration; they’re looking to creators and brands they can trust and believe in.’

YouTube extends this appetite for depth into a visual context. While newsletters invite reflection, long-form video allows wellness to be experienced through demonstration and podcasts add an additional layer of intimacy through voice. Founder explainers, expert interviews, tutorials, and step-by-step routines across these formats offer audiences a clearer sense of expertise and credibility. This shift really denotes the power of podcast as a medium for wellness storytelling.

This resonance spans generations: From our study, Gen Z, Millennials and Gen X all turn to YouTube above other social apps when exploring wellness products and experiences, positioning the platform as a shared reference point for wellness education. In this context, Keller Laird likens YouTube to ‘a modern and more luxurious QVC’; a reference point for discovery rooted in trust, storytelling and expertise rather than urgency.

CHAPTER 2.2

The Research Mindset

> ‘On Instagram, we see some audiences gravitate toward honest, relatable product reviews from creators who feel like your big sister.”

KRISTIE DASH, HEAD OF BEAUTY PARTNERSHIPS, INSTAGRAM

48%

OF RESPONDENTS CITE ONLINE FORUMS AND PEER-TO-PEER REVIEWS AS A PRIMARY DRIVER OF TRUST IN WELLNESS

If long-form platforms shape aspiration, forums and closed groups shape conviction.

In luxury wellness, decisions are often finalised away from polished feeds, in quieter spaces where consumers compare experiences, interrogate claims and look for reassurance from those who have already invested time and money. More often, those conversations are happening in broadcast and group-style formats that feel closer to private chats than public platforms, something that Dash at Instagram describes as channels designed to ‘foster a sense of community and intimacy’ and ‘function like group chats for sharing text, voice notes and videos’. In these spaces, creators are experienced less as influencers and more as relatable voices.

Brands such as Dermalogica have also recognised this shift, using WhatsApp to extend expert skincare consultations into a direct, conversational setting. By moving guidance into familiar messaging environments, advice feels more immediate, personal and credible – and has translated into stronger engagement and commercial performance than traditional email-led campaigns.* The same logic underpins The New Well’s Social Club in Paris, built on WhatsApp as a space where brands, experts and consumers can interact and exchange advice.

Our study reinforces this pattern. 48% of respondents cite online forums and peer-to-peer reviews as a primary driver of trust in wellness, outweighing influencer affiliation and branded storytelling, despite the continued rise of influencer marketing across the wellness category.

‘Word of mouth is becoming the most important thing,’ notes Karla Otto’s Senior Vice President of Creative Strategy, Zoe Patoff. ‘People are leaning more into group chats and forums because that feels more honest.’ This behaviour is especially evident when consumers are evaluating higher-commitment experiences such as destination retreats, medi-spas or longevity clinics, where results matter as much as, if not more than, aesthetics.

Reddit, in particular, has become a hub for research-led decision-making. Health-related discussions on the platform have grown by approximately 48% year on year – and within wellness communities, posts seeking recommendations average 21 responses per post*, reflecting not passive browsing but collaborative problem solving and shared learning.

Unlike curated social feeds, Reddit also prioritises unfiltered dialogue. Moderation teams enforce strict community rules, and many subreddits prohibit overt self-promotion or commercial links as spam, requiring authentic participation before any brand content is accepted. This culture of authenticity reinforces trust. Members will ask for specific results, contrast retreat experiences and critique treatments with a level of honesty rarely found elsewhere.

CHAPTER 2.2

Case Study: How Wellness Plays Out on Reddit

Alongside this macro shift, specific wellness communities on Reddit show how diverse, and deeply engaged, research culture, peer-to-peer spaces and trust-driven discovery have become.

r/Garmin

A wearables community of over 600K members, drawing hundreds of thousands of weekly visitors around tracking, training, and recovery

r/WellnessOver30

A community focused on holistic wellness (28.3K members)

r/Huel

A subreddit for the nutritionally complete food brand, with 37K members

r/WellbeingMagazine

The long-running holistic title, founded by Rachel Branson, joined Reddit in 2025

CHAPTER 2.3

How Does TikTok Actually Rate for Wellness?

While TikTok can provide extraordinary reach, its influence in wellness is more limited than its scale might suggest.

Perhaps surprisingly - and across every generation surveyed in our study - TikTok does not rank among the top three platforms for discovering wellness products and experiences. Although it may serve the first wave of curiosity and can generate mass awareness, 'decisions within luxury wellness are rarely made on impulse,' notes Unsah Malik, Senior Director of Global Beauty & Wellness at Karla Otto. 'A video on a user's FYP, or formats like TikTok Shop or TikTok Live, are not best suited for buy-in. Before committing, consumers tend to seek a second opinion, and that validation most often sits outside of creators and content produced to entertain or educate in shorter bursts; even more so if they are paid deliverables.'

Adding to this, the finding also suggests that many brands are deliberately shifting their energy into more human, less algorithm-driven spaces.

18%

OF LUXURY CONSUMERS DISCOVER NEW WELLNESS PRODUCTS AND EXPERIENCES ON TIKTOK

Image via Unsplash

CHAPTER 2.3

Case Study BLOK: Community over Social

Image courtesy of BLOK

At BLOK, a London-based boutique fitness studio offering over 20 class formats and partnering with brands such as On and adidas on community-led initiatives including run clubs, co-founder Reema Stanbury has consciously chosen not to invest in TikTok, noting that Instagram is also not the studio's primary sales driver. Instead, BLOK's clients connect in real life, before and after classes, with the brand actively creating space for those interactions to happen. In this model, wellness is inseparable from connection: value lies less in viral moments and more in the relationships formed around the experience.

'We're going back to long form-content, thinking about what is it that people really want to know? What do they want to read? What are the hot topics? And how can we help deepen people's knowledge more without it being quick imagery you scroll past.'

REEMA STANBURY, CO-FOUNDER, BLOK

Image credit: One&Only Mandarina
via Kerzner International

The Experience Paradox

03

CHAPTER 3

The Experience Paradox

Experiences have taken over luxury goods as the ultimate status symbol*. Wellness retreats, treatments and spaces offer many elements that money can't buy, especially as HNWI's quest for longevity and self-optimisation intensifies.

But wellness spaces have moved beyond traditional spas, gyms and clinics, into 360-degree hubs catering to a like-minded community. Locations such as Six Senses, Aman Resorts, SIRO Hotels, Third Space and Remedy Place all double as social centres, with some even launching members' clubs.

There, experts including nutritionists, herbalists, physiotherapists, IV drip nurses and personal trainers are more accessible than ever, delivering highly personalised advice grounded in a holistic understanding of each client, often enhanced by technology.

Meanwhile, our data shows tensions between the need for community and seeking individualist treatments, showcasing how wellness experiences should balance both. This comes as Gen Z shows less desire to travel, instead seeking wellness spaces locally and everyday rituals.

Image courtesy of Six Senses London

CHAPTER 3.1

The Travel Conundrum

While Gen Xers and Boomers have long associated wellness with travel – and the opportunity it gives people to escape, disconnect and recharge – younger generations tread a different path. In fact, our survey found that Gen Z is 8% less likely to travel for wellness.

Rather than treating wellness as an episodic indulgence, Gen Z integrate it into their every day, placing greater emphasis on things like nutrition, fitness, sleep and mental health. This is evident across the board: 'Gen Z is a generation that drinks less, favouring instead functional beverages; it is a generation that understands the risks of burnout and sleep deprivation, looking into curating daily wellness rituals to ease the mind, fuel the soul and nourish their bodies,' explains Anna Ross, Head of Insights at Karla Otto.

Leading brands and luxury hotel groups are expanding their portfolios to show up where their younger clients live, bringing the escapist backdrop they're known for in remote countries to cosmopolitan settings like New York, London and Paris. 'There's a huge market for urban wellness now,' notes Sara Henrichs, Vice President of Hospitality at Karla Otto. 'In these locations, fitness, nutrition and recovery all merge into one, enabling brands to support guests at different stages of their wellness journey through more frequent, flexible touchpoints.'

At the same time, older generations continue to seek wellness retreats, particularly through the lens of longevity. Growing interest in the so-called 'Blue Zones', where populations reportedly live longer thanks to overall healthier lifestyles and strong community spirit, offers luxury brands a compelling framework for combining escapism with education. Hyatt has moved decisively in this space with the opening of what is dubbed 'the world's first official Blue Zone retreat'*, the Andaz Peninsula Papagayo Resort in Costa Rica.

-8%

GEN Z IS 8% LESS LIKELY TO TRAVEL FOR WELLNESS

Image credit: One&Only Kea Island via Kerzner International

'If you are truly interested in Wellness, then it becomes a part of your daily life and it is disassociated from travel.'

ELISABETTA TANGORRA, CHIEF BRAND OFFICER, KARLA OTTO

CHAPTER 3.1

Case Study: Six Senses London

Opening soon, the new Six Senses London hotel draws on the notion of nature as a source of healing, from its spa and 'alchemy bar' to a playlist based on the body's circadian rhythm – in a city landscape.

The hotel encourages all guests to undergo a hospital-grade assessment, and its experts can tailor treatments ranging from cryotherapy, flotation tanks and sensory deprivation pods to a 'Biohack Recovery Lounge'. It is also home to the new Six Senses Place, the group's first members' club, which offers a curated programme of events, panels and workshops, plus activities such as fly-fishing and access to medical treatments.

'A big reason why Six Senses is going into urban centres such as London is that for Gen Z and Millennials, wellness is a big part of their day-to-day.'

JATIN SHASTRI, DIRECTOR OF MARKETING & COMMUNICATIONS, SIX SENSES LONDON

Image courtesy of: Six Senses London

CHAPTER 3.2

The Re-Rise of Shared Rituals

Consumers still seek luxurious one-off experiences the most, but community emerges as their third-highest priority. This is especially true for Gen Z and Millennials, the younger generations who, despite being chronically online, crave shared experiences more than ever.

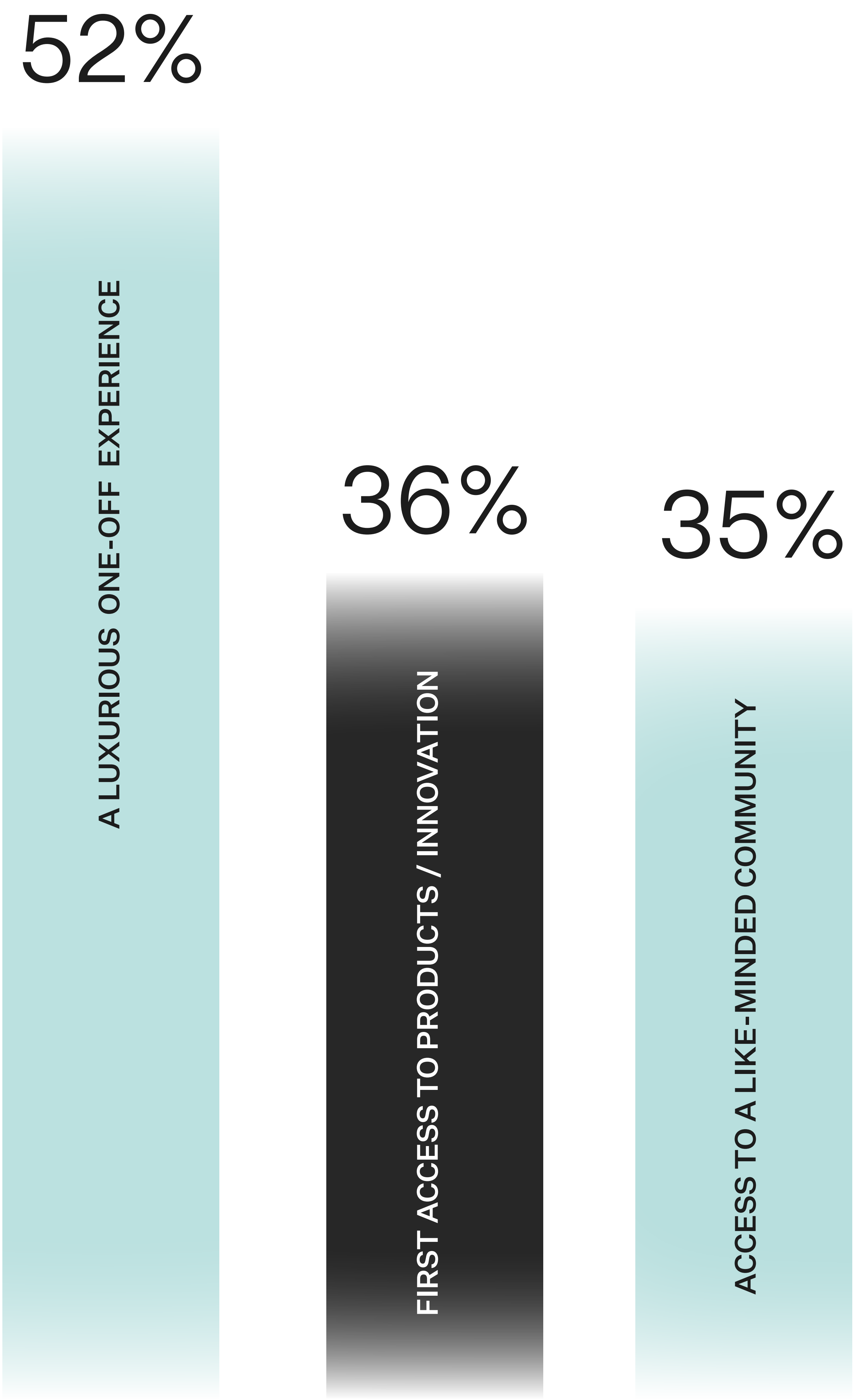
Wellness has always been rooted in human connection. In ancient civilisations, public baths and hammams served as spaces both for restoration and social gathering. Over the past decade, the sector has entered a more performance-based era, led by data tracking and apps promoting the sharing of data. Now, many want to return to a purer form of wellness.

‘People have come to appreciate the value of community. Many were leading pretty insular lives, using spaces like spas to disconnect. They still want to disconnect, but it’s about making it a shared experience now.’

TAFFRYN KINSEY ELLIS, DIRECTOR OF WELLNESS AT SIX SENSES LONDON

Image courtesy of BLOK

COMMUNITY IS CONSUMERS’ THIRD-HIGHEST PRIORITY IN WELLNESS EXPERIENCES



Data based on survey conducted by Karla Otto x Phronesis Partners – see methodology for details.

As spas and more traditional wellness spaces remain top of mind for consumers*, we also see the resurgence of social saunas, particularly as wellness enthusiasts rediscover the benefits of contrast therapy. BLOK's Stanbury points to the social element of its newly opened hot-and-cold space: 'You can talk in the sauna; you start recognising familiar faces from classes, who you've never really had the opportunity to sit next to and connect with.' For younger demographics, this takes shape in the form of 'sauna raves', which are taking off globally as sober, wellness-focused alternatives to clubbing.

New-gen fitness environments like BLOK are increasingly becoming that first point of entry into wellness, particularly for HNWIs seeking both health and community. The rise in run and cycling clubs all speak to this. In 2025, Strava reported growth in clubs like hiking (which grew 5.8x), running (3.5x) and club-organised events (1.5x).* Looking ahead beyond 2026, that sense of community is expected to shift towards Hyrox, an indoor fitness concept, as strength training emerges as the next major trend, according to our experts.

But clubs aren't reserved for fitness alone. In France, The New Well's Founder Tiffany Buathier built an entire community around wellness education, one that aims to bridge the gap between experts, brands and consumers. She notes her recent aim to foster more local communities outside Paris, where wellness is experienced differently: 'Understanding regional community often drives stronger loyalty and long-term engagement, especially in sports and wellness.'

Image credit: SIRO Hotels via Kerzner International

CHAPTER 3.2

Case Study: 48 Collagen Café's Recipe for Success

Community is at the heart of 48 Collagen Café, a new kind of wellness space redefining functional drinks. With 16 years of experience in the industry, founder Amandine Fornot has emerged as a trusted voice, long known for sharing evidence-led advice with friends, family and fellow wellness practitioners.

It is this culture of education and exchange that continues to draw customers back. Beyond the café, the brand has cultivated a private WhatsApp community where members can pose questions to facialists, doctors and scientists, reinforcing trust through dialogue. Recently, Fornot notes a growing appetite for its masterclasses that bring this educational, community ethos into the physical space.

'48CC is a co-authored story. We've turned the café into a knowledge hub. By hosting masterclasses with neuroscientists and experts on topics like hormonal health or cellular aging, we've created a safe space that de-pollutes the noise of wellness marketing. It's a collective movement toward clarity.'

AMANDINE FORNOT,
FOUNDER, 48 COLLAGEN CAFÉ

Image courtesy of 48 Collagen Café

CHAPTER 3.3

Human vs the Machine

‘Optimisation’ and ‘preventative health’ emerged as recurring words among our expert conversations – both evident across wellness experiences that boast cutting-edge technology and biohacking lounges.

The real art, according to our experts, is to marry the tech and the science with human intuition, using data to inform which treatments to undergo. That human touch, after all, is what will keep clients coming back: remembering their names, the various intricacies of their bodies or understanding the mood they might be in on any given day. ‘There’s nothing like intuition, empathy and presence which you can’t get from tech,’ notes Six Senses’ Kinsey Ellis. ‘Human specialists also excel at motivation, trust and behaviour change,’ adds SIRO’s Georgiou. ‘A trainer adjusting a session based on fatigue, a practitioner responding to stress in the body, or a nutritionist tailoring advice to lifestyle and culture; these are decisions technology can’t make alone.’ In experiences, it is this human expertise that will set brands apart, defining the memories they leave behind and the relationships that draw guests back.

‘Human specialists excel at motivation, trust and behaviour change and can take decisions technology can’t make alone.’

MATTHEOS GEORGIOU,
PRESIDENT, SIRO AND RARE FINDS

Image courtesy of 48 Collagen Café

Image credit: SIRO Hotels via Kerzner International

CHAPTER 3.3

Case Study: The Expert Human Touch at SIRO Hotels

Founded by the Kerzner International in 2024, SIRO Hotels present an all-encompassing approach to wellness, focusing on fitness, rest and recovery in equal measure. Located in Dubai and Montenegro, SIRO offers tailored solutions such as jet lag protocols and personalised nutrition. On the pulse of global wellness and hospitality trends, SIRO is expanding its presence with new hotels launching in destinations including Mexico, Miami, Tokyo and Riyadh. Its ethos is supported by athlete ambassadors, including AC Milan players,* working alongside a trusted collective of nutritionists, specialised trainers and therapists.

‘At SIRO, expert-led programming isn’t a nice-to-have, it’s essential to establishing credibility with our guests. That’s why the brand is built around qualified trainers, recovery specialists and practitioners, supported by a science-led approach to cut through the noise and translate expertise into experiences that are accessible, personalised and effective.’

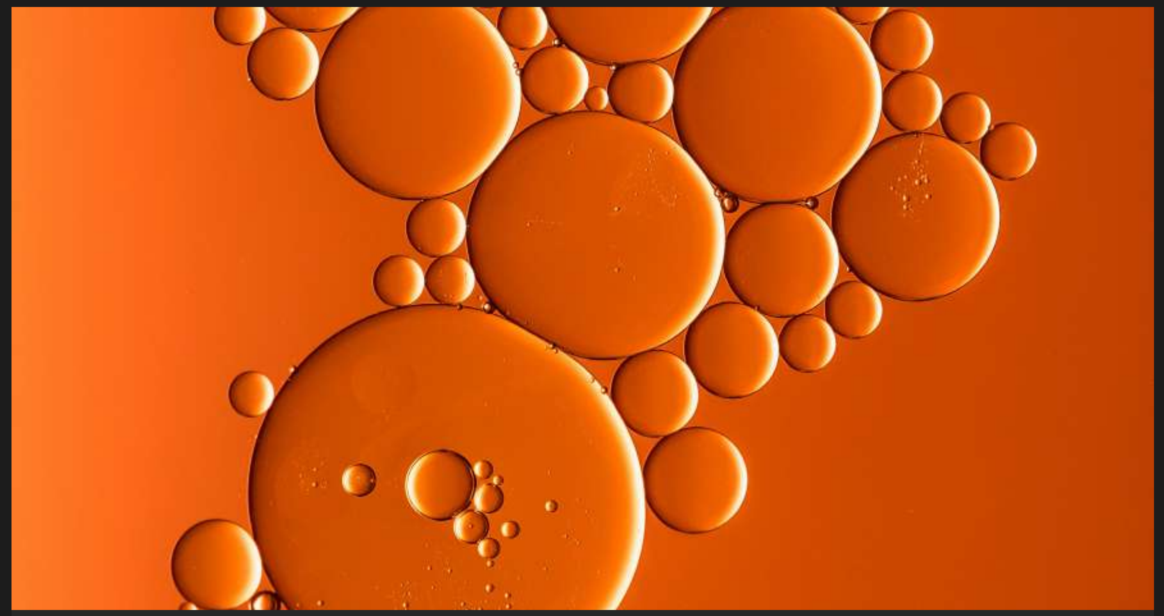
MATTHEOS GEORGIOU,
PRESIDENT, SIRO AND RARE FINDS

Key Takeaways

Image via Unsplash

How to Build a Trusted Wellness World with Karla Otto

1. BUILD TRUST WITH EXPERTS



47%
Engage with expert testimonials

THE TAKEAWAY:

As audiences become more discerning of marketing speak, experts play a critical role in translating complex wellness claims into language people trust.

THE KARLA OTTO SERVICE:

From cosmetic chemists to aestheticians with established audiences, our talent team integrates credible experts into brand communications to shape how products, experiences, and claims are understood across channels.

2. GO IN DEPTH VIA LONG-FORM

48%
Discover wellness on YouTube

THE TAKEAWAY:

Newsletters, videos and podcasts are all seeing a resurgence. In wellness, depth is increasingly how brands distinguish themselves from those relying on surface-level storytelling.

THE KARLA OTTO SERVICE:

We can strategise on the long-form formats that reflect how your audience actually wants to engage, whether that is editorial, audio, or video.

2. ENGAGE WITH YOUR COMMUNITY DIRECTLY

#3
Community is the 3rd highest priority

THE TAKEAWAY:

As word-of-mouth reigns supreme in wellness, the most influential wellness conversations often happen in small, trusted environments that brands rarely plan for but are heavily shaped by.

THE KARLA OTTO SERVICE:

We map and activate the communities that matter most to your category, from private digital spaces to highly curated in-person moments.

2. LEAN INTO YOUR HUMAN NATURE

59%
Obtain recommendations from Friends & Family

THE TAKEAWAY:

As consumers are reminded of the healing power of human connection, they respond to brands that listen, feel present and adapt to their moods.

THE KARLA OTTO SERVICE:

We can help translate brands' internal experts, partners, and network into a coherent external presence, ensuring the human dimension of your brand is consistent.

CONTACT US TO LEARN MORE ABOUT OUR SERVICES.

Karla Otto's 360 Services, From Strategy to Execution

STEP 1: ANALYSIS

STEP 2: STRATEGY

STEP 3: ROLL-OUT

CONTACT US TO LEARN MORE ABOUT OUR SERVICES.

INSIGHTS

Competitor Analysis
Consumer Insights
Market Trends
Workshops & Webinars
Ethnography & Semiotics

CREATIVE STRATEGY

Brand Consulting
Creative Collaborations
Creative Production
Creative Direction
Creative Development

MEDIA & COMMS

Brand Messaging
Media Strategy
Brand Features
Thought Leadership
Editorial Placements
Media Partnerships

INFLUENCERS & CELEBRITIES

Influencer Marketing
VIP Services
Guestlist Management
Product Seeding

EVENTS & EXPERIENCES

Creative Direction
Production
Concept Development
Front of House Services

Meet Our *Experts*

KARLA OTTO

Alexander Werz, CEO & Parter at Karla Otto; Founder at AWvi
Lissy Von Schwarzkopf, Chief Business Officer
Elisabetta Tangorra, Chief Brand Officer
Amy Keller Laird, Senior Vice President, Global Beauty & Wellness
Zoe Patoff, Senior Vice President, Global Creative Strategy
Sara Henrichs, Vice President, Hospitality

INDUSTRY

Amandine Fornot, Founder, 48 Collagen Café
Georgina Graham, British Makeup Artist, Product Developer and Trend Reporter
Georgina Williams, Plastic Surgeon and Co-Founder, Montrose Clinic
Jess Cruel, Editor-in-Chief, Allure and SELF
Kristie Dash, Head of Beauty Partnerships, Instagram
Mattheos Georgiou, President, SIRO and Rare Finds
Preeya Goenka, Chief Customer Officer, beehiiv
Reema Stanbury, Co-Founder, BLOK
Taffryn Kinsey Ellis, Director of Wellness, Six Senses London
Tiffany Buathier, Founder and CEO, The New Well

With thanks to our data partners, Phronesis Partners.

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ABOUT KARLA OTTO

Founded in 1982, Karla Otto is a full-service brand-building agency, operating from thirteen cities across the globe. Karla Otto's service is unparalleled. Blending the best of fashion, beauty, design, lifestyle, and arts & culture, we offer a panoramic view of opportunities and the ability to execute complex ideas. Our loyal network and unrivalled approach to culture and community enables us to take brands to new territories.

DICOVER MORE AT KARLAOTTO.COM OR CONTACT INSIGHTS@KARLAOTTO.COM.

Appendix

Image courtesy of
Six Senses London

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