



Euromonitor
International

Wellness Zones, Mood Crafting and Our Growing Biophilia in the Home

August 2024

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

Wellness in home and garden covers healthy living, natural living, and wellness zone trends

This report builds upon previous work covering how this theme manifests in home products

We have yet to see the full extent priorities post-COVID-19 are reset, but our disquiet continues

Wellness is an attractive growth driver defining new value options across home and garden

WELLNESS ZONES IN THE HOME ARE DEFINED (BUT SPREADING)

Aspects of wellness are embodied in certain rooms, but the trend rises across the home

Lowes and Dulux experiment with paint scent, linking back to the fragrance wellness journey

Nitori launches dinner plates adding to the healthy eating trend and deploying nudge theory

Klaf in Germany launches a foam steam bath with similar messaging to Kohler's steam basin

Home design in new build versus legacy solves (or exacerbates) many types of wellness issue

If your value creation is inside homes, there is no zone that will stay unaffected by this trend

THE SCIENCE OF "MOOD" MAKES FOR POTENT IDEATION STIMULI

Wellness ideation gains from a basic knowledge of brain chemistry and the endocrine system

Of the 50+ identified hormones in our bodies, there are six most closely driving "mood"

There is a dark side to this, with a hormone that creates stress (for good reasons, but still...)

Parallel sectors have deployed EEG, fMRI, saliva and biosensor test structures to build claims

Gardening is great for mental wellbeing (and one reason is the natural Prozac found in soil!)

Yassa's weighted blanket claims to boost happy hormones and reduce cortisol to aid sleep

There are lessons to deploy from our advancing knowledge in the science of mood

BIOPHILIA RISES WITHIN OUR WIDER LOVE AFFAIR FOR ALL THINGS NATURAL

We love "natural", it remains a potent claim, accompanied by a rising aversion to chemistry

"Natural" forms the baseline of wellness range hierarchies, with "mood boosting" at the top

Our relationship with natural elements at home (these are the ones that come for free)

Our relationship with natural elements at home (these are the ones we need to pay for)

Ugao is one of multiple start-ups organising a largely fragmented gardening market in India

Our homes are often poorly vented living spaces with more toxins than we find outdoors

IKEA's GUNRID uses VOC cleaning photocatalytic properties on a net curtain (a window filter)

Initial solutions are not perfect; wellness will provide years of iterative value to get it "right"

CONCLUSION

This affects all regions, but not equally; this is a practical snapshot of the local trend strength

Evolution of Wellness Zones, Mood Crafting and Our Growing Biophilia in the Home

Opportunities for growth: the five-step journey to exploiting wellness growth prospects

Gardena differentiation example: Grow-your-own has a far stronger growth profile than tools

Clear activations and low hanging fruit for "coming soon" innovation opportunities (part 1)

Clear activations and low hanging fruit for "coming soon" innovation opportunities (part 2)

Clear activations and low hanging fruit for "coming soon" innovation opportunities (part 3)

Clear activations and low hanging fruit for "coming soon" innovation opportunities (part 4)

Questions we are asking (beyond "how can I make sure my garden has the nice soil Prozac?")

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/wellness-zones-mood-crafting-and-our-growing-biophilia-in-the-home/report.