WELLTODO PRESENTS THE 2020 WELLNESS INNOVATION BLUEPRINT

PRESENTED IN PARTNERSHIP WITH

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Throughout the last decade, the concept of wellness has exploded – giving birth to a multi-trillion-dollar industry in its own right. What was once identified more broadly as a movement associated with yoga, fitness and healthy eating has evolved exponentially into a complex ecosystem of overlapping and converging categories that are being reimagined and repackaged through a wellness lens.

More nuanced and compartmentalised in nature, today wellness comprises many sub-sectors, from digital fitness, meditation, sleep and corporate wellness to mysticism, technology, clean beauty and sexual wellness — each mature and emerging category ripe with disruptive startups and established businesses alike.

**Innovation is defining this new world of wellness.**

As the industry grows and mutates at a rapid pace, for founders, investors and industry professionals, there is an ongoing need to contextualise this growth in order to understand the possibilities for cross-collaboration, innovation and expansion.

This report will provide that in a way that has not been done before.

Using Welldodo's deep industry knowledge and expertise, we've created an indispensable 60+ page resource featuring 500+ of the industry's most innovative brands, segmented by the 25+ key industry categories and sub-categories that we've identified as being the fastest-growing.

Spotlighting the driving forces behind innovation within each, this first-of-its-kind industry blueprint brings to life the vast number of brands defining a new era of ‘everything wellness’ for the modern consumer. As well as bringing much-needed context, clarity and structure to the multi-faceted global wellness industry.

In mapping out the industry in this way, we don’t intend to present an end-to-end list of every company operating within the space, rather provide you with a resource that pinpoints the depth of diversity and innovation that is driving the industry forward.

The brands we have selected have been chosen based on a number of distinct but equally influential merits, including (but not limited to) funding, innovation, thought leadership, cultural relevance, social impact and industry influence.

*While the Information included in this report is considered to be true and correct at the date of publication - September 2020 - this may be subject to change.*
ATHLEISURE & FASHION

Set to outpace the total clothing and footwear market beyond 2023*, athleisure has cemented itself as a mainstream movement fuelled by consumer desire for multifunctional apparel and an increased interest in adopting a wellness-focused lifestyle. The new ‘everyday staple’, its influence has bridged the gap between fashion and sportswear to become a $155.2bn** bright spot.

Lara Mead, Founder of Varley shares her story on The Business of Wellness podcast. Listen now.

By eliminating barriers to entry, fusing high-performance fabrics with the latest innovations in tech, and in capturing the imagination of consumers searching for multi-functional apparel, forward-thinking brands are attracting new audiences and further accelerating athleisure’s crossover appeal into the non-athletic mindset.

Source: *NPD. **ResearchAndMarkets.com
TALA

FOUNDER: Grace Beverley
LAUNCHED: 2019
FUNDING: N/A
KEY INVESTORS: N/A

NEED TO KNOW: The brand’s ability to understand the motivations of Gen Z, and in response, disrupt the status quo of a category that on the whole, hasn’t been listening to their needs, has struck a chord with a cohort that’s notoriously hard to connect with.

allbirds

FOUNDERS: Joseph Zwillinger & Tim Brown
LAUNCHED: 2015
FUNDING: $77.5M
KEY INVESTORS: Lerer Hippeau, Slow Ventures

NEED TO KNOW: The company’s development of sustainable materials and innovative products, as well as its pioneering collaborations placing purpose over profit, is helping accelerate industry-wide sustainability.

BLUE ELVIN

FOUNDERS: Lamorna & Tamara Short
LAUNCHED: Pre-Launch
FUNDING: N/A
KEY INVESTORS: N/A

NEED TO KNOW: Passionate about breaking down the barriers that exist in functional training for women, Blue Elvin aims to fill a gap in the market with high-performance apparel that protects women when they train.
Wellness-motivated consumers taking a holistic approach to their health have changed the face of beauty in recent years, with the two industries now inextricably linked. The desire for natural ingredients, eco-friendly practices and functional properties has left the door open for smaller independent brands to steal market share from the beauty incumbents, and consumers continue to gravitate towards them.

Clean brands prioritising transparency and clarity over fads or quick fixes are connecting with informed and empowered consumers. Savvy startups positioning themselves within a growing global discourse centred around sustainability are future-proofing their relevance for an increasingly values-driven world. And by embracing CBD as a ‘hero’ ingredient marketed through a wellness lens, new entrants are not only becoming part of the daily wellness routine but are also commanding pride of place in the beauty cabinet.
**CULTURAL PIONEER**

**KINSHIP**

**FOUNDERS:** Alison Hailjun and Christin Powell  
**LAUNCHED:** 2019  
**FUNDING:** $2.8M  
**KEY INVESTORS:** Peak6 Strategic Capital, LLC, H Venture Partners

**NEED TO KNOW:** Created by two beauty industry veterans — Alison Hailjun, formerly the vice president of marketing at Benefit Cosmetics, and Christin Powell, who co-founded Juice Beauty — Kinship is targeting a younger audience by tapping into their cultural values, including sustainability, wellness and inclusivity.

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**GAMECHANGER**

**FACE HALO**

**FOUNDERS:** Rebecca Williamson & Lizzy Pike  
**LAUNCHED:** 2017  
**FUNDING:** N/A  
**KEY INVESTORS:** N/A

**NEED TO KNOW:** A game-changing alternative to makeup wipes, this eco-friendly beauty tool highlights the opportunity that exists for innovators to disrupt the wider beauty ecosystem. A cult favourite, the Australian brand has built momentum via social media as a beauty industry revolutionary.

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**GROWTH MINDSET**

**LOVE BEAUTY AND PLANET**

**FOUNDER:** Sonika Malhotra  
**LAUNCHED:** 2019  
**FUNDING:** N/A  
**KEY INVESTORS:** N/A

**NEED TO KNOW:** A sustainable beauty and body brand from CPG Giant Unilever, Love Beauty And Planet demonstrates how legacy brands that adopt a start-up mentality can reposition themselves for further growth by targeting today’s values-driven generation.

*For more Beauty & Body see Sleep pg 46*
BUSINESS TOOLS & AGGREGATORS

As the global wellness industry continues to expand and evolve, tools and platforms catering to the multitude of businesses operating within it - both from a B2B and B2C perspective - are gaining traction and new relevance. Making it easier for companies and individual professionals to not only operate more effectively but also help consumers find and book with them, these services are playing a huge role in furthering the market.

A new wave of businesses are providing business owners and individual creators with the real-time solutions they need to monetise their services, communicate more effectively with customers and foster an engaged community. While aggregators that connect consumers to wellness services they can book via consumer-facing apps or other digital platforms are helping to power the rise of brands and wellness industry experts. Having revolutionised the way consumers can buy from and engage with brands, these innovators are expanding their offerings beyond bookings to leverage new behaviours and trends.

How’s your financial wellbeing?

As a new breed of accountants, GrowFactor specialises in helping wellness business owners gain financial clarity and minimise tax, so they can live great lives.

As an exclusive offer for Welltodo Innovation Blueprint readers, we’re offering FREE financial strategy sessions and FREE tax reviews for a limited time.

Book your FREE session or tax review at:
growfactor.com/wellness/
**INDUSTRY INNOVATOR**

**Playbook**

**FOUNDERS:** Jeff Krahel, Kasper Odegaard, Michael Wojcieszek, Mike Radoor  
**LAUNCHED:** 2017  
**FUNDING:** $3M  
**KEY INVESTORS:** Giphy founder Alex Chung, Eventbrite co-founder Renaud Visage, former head of product at Uber Daniel Graf

**NEED TO KNOW:** A fitness app aimed at giving content creators the tools they need to cultivate their community and monetise content directly, Playbook answers a real-time need for solutions that help unlock the personal value of fitness and wellness professionals.

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**REVOLUTIONARY THINKER**

**beautystack**

**FOUNDER:** Sharmadean Reid  
**LAUNCHED:** 2020  
**FUNDING:** $6.1M  
**KEY INVESTORS:** Index Ventures

**NEED TO KNOW:** With a core focus of driving economic empowerment in the beauty industry, Beautystack supports the growing market of specialist beauty pros who use social media as their primary means to sell their services. The newly launched app neatly targets a social-media and smartphone-first generation.

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**MARKET LEADER**

**classpass**

**FOUNDER:** Payal Kadakia  
**LAUNCHED:** 2013  
**FUNDING:** $549M  
**KEY INVESTORS:** L Catterton, Temasek Holdings, General Catalyst

**NEED TO KNOW:** Valued at over $1 billion, ClassPass disrupted the fitness market with its fitness membership platform – one of the first to recognise consumer demand for a more flexible and varied approach to fitness. Today the company operates in more than 25 countries and partners with over 30,000 boutique studios, gyms and wellness providers.
The explosion of healthy dining concepts, from fast-casual salad chains and plant-based burger joints to farm-to-table restaurants and organic delis, is indicative of how values-led our connection to food has become. Democratising access to healthy food, bridging the gap between different lifestyle values and pushing the boundaries of healthy convenience through pioneering initiatives, today wellness-focused eateries are influencing the wider hospitality industry and helping to drive positive change.

Demonstrating strong points of difference and the ability to tap into the millennial mindset through bold branding, supply-chain transparency and a clear purpose beyond profit, these frontrunners are amassing a cult-following and making millions in the process.

Read more about the ethical wellness brands driving positive change.
LEON
NATURALLY FAST FOOD

FOUNDERS: John Vincent & Henry Dimbleby
LAUNCHED: 2004
FUNDING: £25M
KEY INVESTORS: Spice Private Equity

NEED TO KNOW: Healthy fast-food chain Leon has risen to prominence in the UK, and more recently the US, thanks to its purpose-led brand ethos and commitment to creating food that not only tastes good but does good. Instrumental in several positive national initiatives, most recently the brand has launched within motorway service stations across the UK – a move it hopes will boost accessibility to healthy food options.

EVERYTABLE

FOUNDERS: David Foster & Samuel Polk
LAUNCHED: 2015
FUNDING: $2.5M
KEY INVESTORS: Acumen, Annenberg Foundation

NEED TO KNOW: A pioneering social enterprise, Everytable aims to transform the food system with its revolutionary model which offers healthy food at lower prices in underserved communities, subsidised by higher prices in more affluent communities. The startup plans to open 25 franchises owned by entrepreneurs of colour from underserved neighbourhoods over the next five years.

FIRST MOVER

FOUNDER: Nick Kenner
LAUNCHED: 2006
FUNDING: N/A
KEY INVESTORS: N/A

NEED TO KNOW: A fast-casual restaurant concept serving healthy food in over 45 locations across the US, the brand recently announced it will display the carbon footprint of every item on its online menu – the first restaurant chain in the US to do so. A bold move for the brand, but one that could soon be commonplace as consumers increasingly look to manage the environmental impact of their purchasing choices.
Workplace wellness is being reimagined by disruptive companies taking a more holistic and nuanced approach to what constitutes a healthy workforce. And, as it continues to move up the boardroom agenda: influencing not only HR but commercial strategy too, digital platforms enabling employers to create full-service solutions delivering personalised experiences for end-users, are uniquely positioned to leverage this evolution.

Integrating advancements in technology, implementing new approaches to wellness and rolling out bespoke services that cater to real-time health and wellness concerns, these brands are unlocking new opportunities in the $48bn global market.1

Source: "CWImage: Fitbit"
GLOBAL POWERHOUSE

**FOUNDERS:** Cesar Carvalho & Joao Barbosa  
**LAUNCHED:** 2012  
**FUNDING:** $300M  
**KEY INVESTORS:** Atomico, General Atlantic

**NEED TO KNOW:** The world’s largest corporate fitness platform, Gympass demonstrates an ability to adapt and evolve alongside the fitness industry to create relevant and personalised programs – including partnerships with boutique studios, individual fitness professionals and digital platforms. The business operates across 14 countries and services 2000+ clients.

MENTAL HEALTH PIONEER

**FOUNDERS:** David Plans, Davide Morelli & Nadeem Kassam  
**LAUNCHED:** 2011  
**FUNDING:** $6.6M  
**KEY INVESTORS:** Samsung, NEXT, Oxford Sciences Innovation, Will Smith

**NEED TO KNOW:** Tackling the mental health epidemic head-on, BioBeats is an AI and biofeedback app designed to teach people where their stress comes from and how to manage it proactively. Recently acquired by health-tech company Huma, the startup’s mission of completely changing the perception of mental health towards a more informed, data-driven part of overall health, has now become one step closer.
FESTIVALS & EVENTS

Over the past few years, wellness festivals, industry events and competitive fitness gatherings have established themselves as a profitable business model, with the US and UK, in particular, playing host to thousands of annual events. These events leverage the gamification trend and desire of individuals to align themselves with a community movement – proving their commitment to the cause.

An effective route for brands to cultivate connections and create unique spaces where communities can be built, B2C events have evolved to cater to a more diverse demographic and the desire for a more holistic and inclusive approach to wellness. Industry-focused events, meanwhile, are finding success in providing the wellness brands of tomorrow with the tools and insights they need to innovate and succeed in this rapidly evolving market.

Despite the current health crisis grounding the live experiences economy to a halt, an increase in demand for online experiences demonstrates a strong appetite still exists — and innovators are seizing the opportunity to connect with global audiences and trial new methods of communication.

Read more about virtual events surge in popularity on welltodoglobal.com....
**TRENDSETTER**

**WANDERLUST**

**FOUNDERS:** Jeff Krasno, Sean Hoess & Schuyler Grant  
**LAUNCHED:** 2009  
**FUNDING:** N/A  
**KEY INVESTORS:** N/A

**NEED TO KNOW:** An early pioneer of the wellness festival movement, Wanderlust has captivated a global audience for more than a decade, growing to become a lifestyle brand hosting over 60 events globally in 20 countries. Its immersive and conscious approach to wellness has been influential in shaping the explosion of wellness festivals in recent years.

**FOUNDER:** Andrew Manteit  
**LAUNCHED:** 2017  
**FUNDING:** N/A  
**KEY INVESTORS:** N/A

**NEED TO KNOW:** Under Armour Turf Games has found its footing by leveraging demand for community-driven and experience-led fitness events that are inclusive and accessible. Having started as an independent operation, the brand has since secured sponsorship from Under Armour and plans to expand its concept into major international cities over the coming years.
FITNESS

Having experienced multiple inflection points over the past decade, the global fitness industry continues to grow, as consumers gravitate towards healthy living underpinned by the desire for convenience, connection and community. The boutique model, which revolutionised the market via its consumer-first and differentiated approach, has evolved to breathe new life into a more diverse range of fitness concepts, integrating cutting-edge tech and emerging consumer trends to remain relevant.

Premium gyms are elevating the experience by connecting the dots between the ever-expanding elements of the wellness lifestyle, as well as catering to the distinct needs of their local markets. And connected fitness equipment threatens to upend the market once again with its clever use of data and ability to cultivate an engaged community despite its digital nature. By pivoting and shifting their offerings to cater to consumer wants and needs in a ‘new world’, these fitness brands are well-positioned to gain a foothold on the next iteration of the market.

Read more about how online platforms are battling to win over the new digital fitness consumer on welltodoglobal.com
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DIGITAL DISRUPTOR

MIRROR

FOUNDER: Brynn Putnam
LAUNCHED: 2016
FUNDING: $74.8M
KEY INVESTORS: lululemon, Spark Capital, Lerer Hippeau

NEED TO KNOW: Leading the hype around a rapidly expanding group of at-home connected fitness upstarts, Mirror’s high-growth potential has caught the eye of Athleisure powerhouse lululemon, which recently snapped it up in a deal worth $500m. As consumers get comfortable with new ways of working out, lululemon is hoping it can anchor itself, and Mirror, within this evolving fitness landscape.

FAST-RISER

Aaptiv

FOUNDER: Ethan Agarwal
LAUNCHED: 2015
FUNDING: $60M+
KEY INVESTORS: Insight Partners, Bose Ventures

NEED TO KNOW: Valued at $200m Aaptiv – a provider of premium digital health and wellness content that has garnered over 200k paying members since its launch – is backed by heavy-hitting investors including Amazon, Disney and Warner Music Group. The self-dubbed “Netflix For Fitness” has scaled rapidly, as consumers continue to opt for digital fitness solutions that slot more seamlessly into their lives.

GROUNDBREAKER

THE CLASS

BY TARYN TOOMEY

FOUNDER: Taryn Toomey
LAUNCHED: 2011
FUNDING: N/A
KEY INVESTORS: N/A

NEED TO KNOW: Touted as a transformative workout for the mind and body, The Class by Taryn Toomey has exploded from a four studio operation to a virtual phenomenon amid a global shift to digital. Resonating with consumers looking for an emotional and physical release, Toomey’s ‘out of the box’ concept taps into demand for more holistic, spiritual, and reflective forms of fitness that cater to self-care rather than just physical intensity.
As recognition grows around the interdependency between health and wellness, the once distinctly separate industries are joining together to form a more holistic and empowered approach to primary care. Accelerated by concepts like ‘exercise as medicine’ and ‘eating for life’ that have captured the imagination of consumers, this shift in thinking has led to an increase in concepts catering to individuals who want to take charge of their health. And make proactive changes in line with ‘prevention rather than cure’.

With a shift away from fragmented care to a more integrated and functional approach, the next generation of brands are connecting with consumers through bespoke and personalised propositions that put them in the driver’s seat. And give them direct access to credible healthcare solutions in an affordable, relatable and convenient format. By simplifying the process and breaking down barriers to entry, these pioneers are showcasing what the future of healthcare should look like.
kindbody

FOUNDERS: Gina Bartasi & Joanne Schneider
LAUNCHED: 2018
FUNDING: $63.3M
KEY INVESTORS: Centre Street Partners, GV

NEED TO KNOW: Backed by fresh funding to the tune of $32m, this fast-growing health-tech company, providing fertility, gynaecology, and family-building care is ripping up the rule book to deliver a more welcoming, inclusive experience for women. Launched by Gina Bartasi, a fertility industry veteran who previously launched Progyny, it’s part of a growing movement to democratise women’s health services.

FOUNDER: Robin Berzin
LAUNCHED: 2016
FUNDING: $36M
KEY INVESTORS: Amplo, Gaingels, Whitestar Capital

Parsley Health

NEED TO KNOW: Reimagining the future of healthcare, Parsley Health offers a unique approach to medicine that blends cutting-edge testing, nutrition, and wellness with conventional medicine. Its modern aesthetic gives an air of aspiration to the traditional doctor’s visit, while its personalised medical services across telemedicine, diagnostics and in-person enables members to pick and choose how they access support rather than being at the mercy of their providers.

FOUNDER: Tania Boler
LAUNCHED: 2013
FUNDING: $53.8M
KEY INVESTORS: Octopus Ventures, Allbright, Upscale

elvie

NEED TO KNOW: One of the pioneers of the femtech movement, Elvie continues to innovate smarter technology that pushes the conversation forward. Its first product the Elvie Trainer – an app-connected Kegel trainer that helps strengthen the pelvic floor – challenged the status quo and disrupted the male-dominated tech arena. Since then, the startup’s second innovation, the Elvie Pump has gone on to create an entirely new experience around pumping.

For more Empowered Health see Wellness Clubs pg 53, Fitness pg 20, Wellness Real Estate & Design pg 54, Personal Care pg 49

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As today’s inquisitive and informed consumers expand the parameters of what should be viewed through a wellness lens, this is creating new sub-categories within the industry — financial wellness being a prime example. A movement spearheaded by millennials navigating the realities of living in uncertain and oppressive economic times, it has spawned a new wave of challenger brands that are rewriting the narrative and breaking open a once taboo subject.

By connecting mental wellness and self-care principles to such an integral aspect of life, progressive brands such as these are finding they can position themselves as the new everyday practices that consumers commit to as part of their complex quest for empowerment and elevated wellness.
THOUGHT LEADER

ELLEVEST

FOUNDERS: Charlie Kroll & Sallie Krawcheck
LAUNCHED: 2014
FUNDING: $77.6M
KEY INVESTORS: Rethink Impact, Morningstar, PayPal Ventures

NEED TO KNOW: A platform catering to women searching for services that help them cultivate a healthier relationship with wider lifestyle influences, Ellevest aims to bridge the investing gap. Built by women, for women, the brand’s straight-talking rhetoric and modern aesthetic have struck a chord with 90,000 customers by connecting the dots between wellness, self-care and financial empowerment. Recently expanding into the realm of banking, the company has a wider goal of getting more money into the hands of women.

CHALLENGER

REVOLUT

FOUNDERS: Nikolay Storonsky & Vlad Yatsenko
LAUNCHED: 2015
FUNDING: $917M
KEY INVESTORS: Seedcamp, Index Ventures, Greyhound Capital

NEED TO KNOW: With more than 10 million customers in the UK and Europe, Revolut’s growth and scale to new markets demonstrates the demand for financial platforms that challenge existing and out-dated models. Transforming not only the way money works but how consumers engage with it in a healthy and empowered way, the platform continues to co-innovate to deliver truly differentiated financial services to consumers.
The increasing adoption of healthy habits has driven cataclysmic change across the food and beverage industry globally — manifesting itself in everything from ‘clean eating’ to the call for more transparency in sourcing and supply chains. In response, the growth in new entrants across all categories has been seismic — and innovation in ingredients and formats continues to upset the apple cart in categories ripe for disruption.

Filling respective gaps in the market for consumers searching for alternatives to existing products — without sacrificing on taste, associated benefits or social experiences attached to their consumption — upstarts across emerging categories are laying the foundations to become the leaders of the future by executing change in a faster, more agile and relevant way than their legacy counterparts. Functional ingredients like CBD and adaptogens, meanwhile, continue to dominate the industry, as consumers demanding all-in-one solutions turn to brands to come up with new and revolutionary solutions that address their needs.

Read more about the demand for plant based protein on welltodoglobal.com.
# FOOD & BEVERAGE

## Functional Nutrition
- Halo
- RXBAR
- KIND
- hydrant
- flow
- Tenzing
- Kellogg's
- Health Warrior
- Magic Spoon
- Vive organic
- Health-Ade
- Primal Kitchen
- Nightfood

## CBD-Infused
- Meda
- Wonder
- Oleo
- Infused
- TRIP
- MAD TASTY
- Recess
- DRAM
- Vita Coco
- Canopy Growth
- Botanic Lab
- Good Bites CBD
- Nightfood

## No or Low Alcohol
- Kin
- Haus
- Seedlip
- Ritual Zero Proof
- Curious Elixirs
- Rock & Grace
- Proposition
- Töst
- Three Spirit
- Clean Liquor
- Galerno
- Vybess
- Zata
- Heineken

## Plant-Based
- Alpha Foods
- Bright Barley
- Ripple
- Beyond Meat
- Impossible
- Oatly!
- Impossible
- Incogmeato
- Nuggs
- Oumph!
- The Meatless Farm Co.
- Just
**FUNDERS:** Benjamin Witte, David Hess & Justin Hauser  
**LAUNCHED:** 2017  
**FUNDING:** $3M  
**KEY INVESTORS:** Torch Capital, Great Oaks Venture Capital

**NEED TO KNOW:** Launched amid a flurry of hype, CBD beverage brand Recess delivered 40 times its projected sales in its first month alone. Guerilla-style marketing tactics, slick branding and the ability to reflect the values and aspirations of a younger generation have seen the startup, which touts itself as “an antidote to modern times,” lead an increasingly competitive category.

---

**FOUNDER:** Ben Pasternak  
**LAUNCHED:** 2018  
**FUNDING:** $11.1M  
**KEY INVESTORS:** McCain Foods, Rainfall Ventures

**NEED TO KNOW:** The brainchild of 20-year-old tech entrepreneur Ben Pasternak, Nuggs – a plant-based chicken nugget startup – claims to have the competitive edge over its peers due to its innate ability to understand what younger consumers want. On a mission to create interesting, and innovative plant-based meat via a tech-driven approach, the startup, which is backed by McCain Foods, looks to move beyond chicken nuggets under its newly rebranded company Simulate.

---

**FUNDERS:** Jennifer Batchelor & Matthew Cauble  
**LAUNCHED:** 2017  
**FUNDING:** $5M  
**KEY INVESTORS:** Refactor Capital, Canaan, Fifty Years

**NEED TO KNOW:** Targeting the sober curious, Kin’s blend of nootropic, adaptogen and botanical beverages aim to disrupt a 10,000 year-long social drinking tradition and create a new category around “euphors”. At a time when sales for alcohol alternatives are soaring, the pivot towards a more mindful approach to drinking appears to be sticking and Kin is riding the wave.

*For more F&B see Meal Delivery & Recipe Kits pg 32, Kids Wellness pg 31*
LEGACY MOVES

THE CPG GIANTS ZOOMING IN ON WELLNESS VIA INVESTMENTS, ACQUISITIONS AND NEW PRODUCT LAUNCHES.
KIDS WELLNESS

Having permeated every aspect of our adult lives, wellness has started to splinter into generational offerings that support a proactive relationship with our wellbeing from an earlier age.

Millennial parents familiar with the benefits of leading a healthier lifestyle are placing greater value on the adage ‘you are what you eat’, meaning ingredient-conscious F&B brands targeting children are finding themselves able to leverage a largely untapped opportunity. For trailblazers in other categories like sleep and fitness, that can capitalise, not only on boosting the wellness of children but also enabling their parents to reclaim moments of restoration and self-care, there also exists an opportunity to become truly indispensable.

FOUNDEES: Angela Vranich, Ben Lewis, Lisa Barnett & Michelle Muller
LAUNCHED: 2017
FUNDING: $17M
KEY INVESTORS: Vaultier7, Serena Ventures

NEED TO KNOW: A first mover in the DTC organic baby food category, Little Spoon has already caught the eye of heavy-hitting investors, including Tinder co-founders Sean Rad and Justin Mateen and Kyle O’Brien from yogurt brand Chobani. In challenging a sleepy industry which has been dominated by highly processed options, the brand aims to give parents access to quality nutrition and wellness products for their children.
MEAL DELIVERY & RECIPE BOXES

Enjoying a surge in sales in response to the coronavirus pandemic and resulting lockdowns, meal delivery and recipe kit providers have once again found their footing following a tumultuous trajectory over recent years. A revolution in convenience and instant gratification, the booming category has exploded with options catering to a generation too time-starved or burnt-out to cook from scratch. To differentiate themselves, the outliers are reinventing the model to leverage today’s ‘everything wellness’ state of mind.

Whether powered by plants, organic farm-frozen or pre-portioned to support specific lifestyle goals, these visionaries are carving out a niche by understanding the motivations of their customers and communicating their value.

Listen to Myles Hopper, Co-Founder of Mindful Chef on The Business of Wellness podcast.
ONE TO WATCH

DAILY HARVEST

FOUNDER: Rachel Drori
LAUNCHED: 2015
FUNDING: $43M
KEY INVESTORS: Lightspeed Ventures, Serena Ventures, M13

NEED TO KNOW: Redefining the frozen category with farm-frozen ingredients, Daily Harvest’s innovative approach to meal delivery has seen it cement itself as one of the fastest-growing companies in the DTC food space. By addressing the conflict between the way people aspire to eat and the way they have time to eat, it is poised to become a leading innovator.

CHALLENGER

MINDFUL CHEF

FOUNDERS: Giles Humphries, Myles Hopper & Robert Grieg-Gran
LAUNCHED: 2015
FUNDING: £9.3M
KEY INVESTORS: Piper, Andy Murray

NEED TO KNOW: Mindful Chef has built a powerful brand that has the potential to shape the future of consumption. The healthy, ethically and responsibly sourced delivery service has grown from a man and van operation on the coast of Cornwall to a national business generating annual revenues of £40m. Its willingness to adapt and reinvent itself has seen recent collaborations with Nandos, Deliveroo and a host of high profile celebrities, further bolster its growth.
Amplifying and dissecting what it means to embody a wellness lifestyle, consumer publications tracking and reporting the latest trends, launches and developments across a multitude of different wellness categories have risen alongside the industry.

Catering to and spotlighting specific interests, approaches and perspectives, these leading curators of content are cultivating engaged communities by communicating credible and understandable information. In spearheading revenue-driving collaborations and initiatives, they’re not only enabling their platforms to scale but supporting the growth of the industry more generally.
TRENDSETTER

WELL+GOOD

FOUNDERS: Alexia Brue & Melissa Gelula
LAUNCHED: 2010
FUNDING: $10M
KEY INVESTORS: Leaf Group

NEED TO KNOW: Launched back in 2010 before wellness exploded into the $4.5 trillion market* that it is today, WELL+Good has grown alongside the industry to become synonymous with the wellness lifestyle. The forward-thinking business continues to drill into its community as a means of boosting revenue and future-proofing itself within the increasingly membership-based world of digital publishing.

Source: *GWI

RISK TAKER

mindbodygreen

FOUNDERS: Jason Wachob
LAUNCHED: 2009
FUNDING: $6.5M
KEY INVESTORS: Ara Katz, Benvolio Group

NEED TO KNOW: A lifestyle media brand with more than 10 million monthly visitors, Mindbodygreen has leveraged the power of its brand to expand into online courses, events, and most recently the ingestible beauty category. According to Founder Jason Wachob, its female-dominated audience is x5.4 more likely than average consumers to have spent $500 or more on skincare, with 82% of its readers already taking supplements regularly. He plans on converting that spend into direct sales.
MEDITATION & MINDFULNESS

A multi-billion-dollar industry and growing, today meditation and mindfulness have cemented themselves as key pillars of wellness. Reimagined and repackaged to serve the needs of a digital-first generation plagued by poor mental health and the desire for self-optimisation, incumbents and new entrants alike are now turning their attention towards disrupting the status quo. In their quest, they’re creating more reflective and accessible pathways into both practices.

Demand for personalisation is greater than ever before, and identity-driven consumers are demanding offerings that are more intuitive, reflective and diverse. These forward-thinking disruptors are rising to the challenge by becoming more approachable, enjoyable and culturally relevant. In doing so, they’re serving untouched demographics.

We know that dealing with legal issues for your wellness business can feel like a bit of a puzzle.

We’re here to help you put together the pieces...

Experts in Wellness

With more than 1,300 lawyers in 29 offices across 20 countries, including Europe, Asia and the Middle East, we specialise in combining leading expertise across the full range of legal services to businesses operating in key industry sectors. Our Retail & Consumer group comprises experts in the food & beverage, fitness, technology, hospitality, fashion and beauty sectors. We are incredibly well placed to advise on key legal issues and commercial opportunities which exist within the Wellness industry.

We provide a full range of legal services to our clients, including commercial, intellectual property, brand and reputation management, corporate, employment, e-commerce, data protection, dispute resolution, multi-channel distribution strategies, regulatory, finance, competition and real estate.

Our breadth of legal expertise and understanding of the challenges presented by this industry enable us to provide a seamless service to guide our clients through all stages of business growth. We’re SME friendly and have years of experience advising growth stage companies – our dedicated team of ‘Wellness lawyers’ are experts in the field and become trusted advisors to our clients, combining passion and insight with in-depth understanding and legal knowledge. We also know complete visibility on fees is essential to any business – we work with clients to agree bespoke project plans and are flexible enough to suit a wide range of budgets. Investing in legal support can help your business thrive.

If you’re ready to make your next move, get in touch below for a free 30 minute consultation.

Bird & Bird

twobirds.com
wellness.team@twobirds.com

Graeme Payne
Partner, UK
graeme.payne@twobirds.com

Emma Green
Associate, UK
emma.green@twobirds.com
### DIGITAL
- headspace
- Calm
- WAVE
- Insight Timer
- TEN PERCENT HAPPIER
- SIMPLE HABIT
- journey
- MEDITIPIA
- HAPPY NINJA FLEX
- moshi

### TECHNOLOGY
- muse
- spire health
- BrainBit
- Flowtime
- Emotiv
- bellabeat
- ŌURA
- WAVE

### STUDIO
- Re:Mind
- unplug
- THE•DEN
- Roam

### MEDITATION & MINDFULNESS
CULTURAL PIONEER

WAVE

FOUNDERS: Brad Warsh & Mason Levey
LAUNCHED: 2018
FUNDING: $5.7M
KEY INVESTORS: Lerer Hippeau, Crosslink Capital

NEED TO KNOW: WAVE answers consumer demand for elevated at-home meditation that’s more culturally-driven. The platform, devised after the founders noticed growing demand for music-driven meditation experiences, enables participants to engage with the practice on their own terms. Engagement with the brand is encouraged to be worn as a badge of honour — a way for consumers to share their journeys with mental wellness, but still feel part of a cool collective.

GLOBAL DISRUPTOR

MEDITOPIA

FOUNDERS: Ali Murat Ceylan, Berk Yilmaz & Fatih Mustafa Celebi
LAUNCHED: 2015
FUNDING: $18.2M
KEY INVESTORS: StartersHub, Highland Europe

NEED TO KNOW: Providing personalized content, including mindfulness-based meditations, sleep meditations, music and more, Meditopia is the most-downloaded meditation app in non-English speaking markets. Available in 75 global markets, in 10 languages, thanks to its local and cultural relevance it has attracted 14 million users. With plans to double down on localization, it is filling a gap for more culturally specific wellness solutions.

TECH PIONEER

Muse

FOUNDERS: Ariel Garten, Chris Aimone & Trevor Coleman
LAUNCHED: 2007
FUNDING: $28.2M
KEY INVESTORS: FF Venture Capital, Omers Ventures

NEED TO KNOW: “Brain sensing headband” Muse, is a portable EEG with real-time feedback that aims to take the guesswork out of meditation. By making the intangible tangible, the tech-driven startup aims to encourage longer-term adoption of meditation and empower users to better understand their brains. The recent introduction of a sleep-friendly device has seen the startup take aim at the adjacent multi-billion dollar sleep category.
In just a few short years mental health has risen to mainstream prominence, as a more health-conscious generation gravitates towards a holistic approach to wellness underpinned by the mind-body connection. Brands creating new narratives have emerged in response — as has a shift from a treatment to prevention mentality. Within this new paradigm, mental health is being considered more broadly — on a sliding scale — to encompass not only diagnosed health conditions but also one’s constantly evolving psychological state.

Platforms meeting younger generations where they exist, leveraging technological advances to deliver more intuitive solutions and those democratising access to mental health care are emerging as the ones to watch. As are those tailored to cultural, identity-driven and personal goals.

Read more about how tech is bridging the funding gap to tackle a global mental health crisis on welltodoglobal.com.
FOUNDEES: Marah Lidey & Naomi Hirabayashi
LAUNCHED: 2015
FUNDING: $8.3M
KEY INVESTORS: BBG Ventures, Felix Capital, Female Founders Fund

NEED TO KNOW: A self-care solution meeting millennials where they already exist, Shine is used by 3 million people. The app, which was ahead of the curve in making self-care more front of mind, sends daily motivational texts that feel friendly and conversational in style to create a more accessible, actionable and ‘non-shamey’ approach to wellness.

FOUNDER: Alex Katz
LAUNCHED: 2016
FUNDING: $28M
KEY INVESTORS: Amplo, Maveron

NEED TO KNOW: Two Chairs is rebranding the therapy experience by creating a more personalised, thoughtful and non-judgemental experience for young people. Leveraging technology to pair its customers with a therapist best-tailored to their needs, the startup has captured the attention of investors who have poured $28m into the business, to date. The brand is using the intersection of clinical care, technology, and design to enable customers to be their authentic selves.

*For more Mental Wellness see Virtual Therapy pg 49, Sleep pg 46, Corporate Wellness pg 15
Historically a fragmented and murky market, the supplement and nutrition space has, for the most part, remained commoditised, with consumers demonstrating little emotional connection towards the brands they’re buying. Bucking that trend, identity-driven brands bridging the gap between health and beauty, driving the future of personalisation and creating aspirational lifestyles around their products, are making supplements cool.

Innovation in product development, efficacy in ingredients and an unfiltered approach towards transparency and education are also driving the category forward. And brands that can provide value beyond their products are finding themselves at the forefront of the market.

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**CATEGORY LEADER**

**FOUNDER:** Kurt Seidensticker  
**LAUNCHED:** 2014  
**FUNDING:** $25.5M  
**KEY INVESTORS:** Nestle Health Sciences, Cavu Venture Partners

**NEED TO KNOW:** Backed by Nestle Health Sciences, in the first major acquisition of a collagen-based wellness company to date, Vital Proteins is causing a stir in this growing area of nutrition. Its collagen powders, bars and capsules have become the leading collagen products in America, generating annual sales of more than $100m in under four years.

---

**TRAILBLAZER**

**FOUNDER:** Jules Miller  
**LAUNCHED:** 2016  
**FUNDING:** $10.5M  
**KEY INVESTORS:** Unilever Ventures, Morningside Group, Waldencast

**NEED TO KNOW:** Distinct from most DTC brands, which tend to prioritise tech over product, The Nue Co.’s product-led approach has already helped to address the two largest pain points in the supplement industry: retention and brand loyalty. Coupled with founder Jules Miller’s savvy and switched on approach to NPD and wellness — the latter of which she believes won’t have a specific look and feel in the future — the brand continues to set the bar for innovation and disruption.

---

**VISIONARY**

**FOUNDERS:** Ara Katz & Raja Dhir  
**LAUNCHED:** 2007  
**FUNDING:** undisclosed  
**KEY INVESTORS:** Founders Fund, Slow Ventures, Greycroft Ventures

**NEED TO KNOW:** A microbial sciences company that develops clinically-studied probiotics to impact human and planetary health, Seed Health is disrupting the global probiotics market and stewarding the future of how people use bacteria to restore and sustain human and planetary health. The brand, which recently launched a 6 week Instagram science course is leading the way when it comes to making science-led wellness more fun and accessible.


*For more Nutrition & Supplements see Sleep pg 46, F&B pg 17, Beauty & Body pg 7*
Filling a gap for more accessible, affordable routes to entry and the normalisation of previously taboo topics, a host of new players have stepped up to reinvent the wheel when it comes to personal care and sexual wellness.

These brands are selling alternative solutions for erectile dysfunction, hair loss, intimate pleasure and feminine care using slick packaging, unconventional messaging and simplified processes that tap into the psyche of Gen Z and millennials. By creating cool lifestyle brands that break down stigmas and speak to issues that haven’t been previously addressed outside of the doctor’s office, they’re finding themselves at the centre of a shift that’s cultivating consumer trust, in an era of scepticism and hard-won loyalty.

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**UP & COMER**

**Cakee**

**FOUNDERS:** Hunter Morris & Mitch Orkis  
**LAUNCHED:** 2020  
**FUNDING:** $1.435M  
**KEY INVESTORS:** Brian Spaly, Co-Founder of Trunk Club & Bonobos, Brand Foundry Ventures

**NEED TO KNOW:** Emerging as part of the sexual wellness explosion, in which female pleasure is being repacked and reimagined within the trappings of the wellness lifestyle, Cake offers specialized products, free from toxic ingredients, that claim to enhance sexual experiences. Backed by $1.435m in seed funding, the inclusive brand has been designed to appeal to more nuanced and fluid approaches to gender and sexuality.

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**TRENDSETTER**

**LOLA**

**FOUNDERS:** Alexandra Friedman & Jordana Kier  
**LAUNCHED:** 2014  
**FUNDING:** $35.2M  
**KEY INVESTORS:** Spark Capital, Serena Venture, Lerer Hippeau

**NEED TO KNOW:** With a goal to provide women with organic tampons and to create a brand that is completely transparent about the ingredients in its products, LOLA launched as a pioneer in a category that is now undergoing a radical transformation. Having started out as a DTC subscription platform, the brand, which is helping to drive a cultural shift around feminine care, has since rolled out its period products across the shelves of Walmart stores in the US.

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**REVOLUTIONARY**

**Roman**

**FOUNDERS:** Rob Schutz, Saman Rahmanian & Zachariah Reitano  
**LAUNCHED:** 2017  
**FUNDING:** $376.1M  
**KEY INVESTORS:** Torch Capital, General Catalyst, FirstMark

**NEED TO KNOW:** Nestled under the umbrella of parent company and recent recipient of unicorn status Ro, Roman aims to cut out the middleman by providing men with solutions to personal health issues including erectile dysfunction and hair loss. Like many of its cookie-cutter peers, its straightforward and simple approach aims to destigmatize health concerns and empower men to take control of their wellness.

*For more Personal Care & Sexual Wellness see Empowered Health pg 23*
BILLION DOLLAR BRANDS

THE WELLNESS BRANDS VALUED AT OVER 1 BILLION DOLLARS

[Logos of various wellness brands]
**SLEEP**

The most elusive wellness commodity of modern times, sleep has become the ultimate status symbol, and a plethora of products and services are luring in consumers on a quest to cultivate the perfect night’s sleep.

Creating an experience around the entire sleep cycle, thought-leading brands are reframing not only how consumers engage with bedtime but how their relationship with wellness feeds into their quality of sleep. From sleep-tracking technology to slumber-inducing skin and beauty products, these savvy brands are positioning themselves as purveyors of a lifestyle that expands way beyond the humble mattress.

### SLEEP ACCESSORIES

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### TECHNOLOGY

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WHOOP

FOUNDERS: Aurelian Nicolae, John Capodilupo & Will Ahmed
LAUNCHED: 2012
FUNDING: $104.8M
KEY INVESTORS: Two Sigma Ventures, Promus Ventures

NEED TO KNOW: Inspired by the idea that humans could optimise their lives if they had a systematic approach to understanding their bodies, Whoop’s wearable device has built momentum in response to the growing demand for self-optimisation and high-performance lifestyles. A 24/7 coach designed to improve training, sleep and lifestyle choices, the cutting edge wearable is differentiating itself by helping users unlock meaningful insights and real-time feedback that translates easily into action.

OURA

FOUNDERS: Kari Kivela, Markku Koskela & Petteri Lahtela
LAUNCHED: 2013
FUNDING: $76.5M
KEY INVESTORS: Spark Capital, Serena Venture, Lerer Hippeau

NEED TO KNOW: Counting Prince Harry as a fan, this smart ring is the world's most advanced sleep tracker. A standout in the wearable category, thanks to its innovation in design and wearability, the ring, which claims to help the wearer sleep better, has been bought over 150,000 times. With $28m in fresh funding under its belt, in recognition of a cross-industry trend, the business now plans to bring actionable insights for users to the forefront.

PROPER

FOUNDER: Nancy Ramamurthi
LAUNCHED: 2020
FUNDING: $9.5M
KEY INVESTORS: Casa Verde Capital, Redesign Health

NEED TO KNOW: A holistic sleep solution combining coaching and supplements, Proper launched at a time when poor sleep continues to be considered a global epidemic. Backed by Snoop Dogg’s cannabis-focused firm Casa Verde Capital, the startup says it plans on exploring applications for cannabinoids in its supplements as crossover between the two categories steadily grows.

*For more Sleep see Wellness Travel & Hotels pg 51, Wellness Clubs pg 53 and Nutrition & Supplements pg 41
SPIRITUAL WELLNESS

As the multi-billion dollar complementary/alternative medicine market continues to grow, spiritualism and mysticism have begun to infiltrate the wellness industry on a mainstream scale.

Sparking a rise in everything from AI-powered astrology apps to crystal-infused water bottles, beyond the movement’s chic aesthetic and aspirational appeal, brands that can provide an outlet for an alternative sense of wellbeing — through connection, empowerment and accountability — are helping individuals to manifest a positive change in their lives, and in doing so are finding a sweet spot that sells.

These new-age wellness brands operating in an age of uncertainty and disconnection are stepping in to fill a void, and leaving their customers feeling more healthy and balanced in the process.

FOUNDERS: Anna Kopp, Banu Guler & Ben Weitzman
LAUNCHED: 2017
FUNDING: $6M
KEY INVESTORS: Female Founders Fund, Imagination Capital

NEED TO KNOW: As interest in astrology continues to skyrocket, Co-Star’s millennial take on the previously out-of-vogue practice has seen it captivate a global audience. Its use of A.I to generate astrological charts and daily horoscopes that can be shared with others, has won the app a cult following, thanks to what it argues “facilitates intimacy in the desert of our social relations.”
THERAPIES

Bringing ancient, alternative and sometimes taboo practices to the masses, this uprising of brands are leading a revolution when it comes to how people view and engage with therapy.

By aligning themselves with trends already woven into the mainstream, and in making their services more convenient, accessible and affordable, providers of acupuncture, massage and floatation are providing new pathways to natural health solutions. Elsewhere, virtual therapy platforms providing on-demand support for today’s mobile-first world, are helping to erode stigmas, provide greater accessibility, and change the face of modern mental health care via direct-to-consumer offerings.

Read more about modern acupuncture winning investment from Strand Equity alongside Cameron Diaz on welltodoglobal.com.

Image: Floatworks
TRENDSETTER

**FOUNDER:** Matt Hale  
**LAUNCHED:** 2016  
**FUNDING:** undisclosed  
**KEY INVESTORS:** Strand Equity, Cameron Diaz

**NEED TO KNOW:** By adopting a boutique approach to suit the needs of the modern consumer and bring acupuncture into the 21st century, Modern Acupuncture is leading the growth of the category. With over 50 locations across the US, the brand believes it is pioneering a movement towards natural wellness unlike anything else in the market.

DIGITAL DISRUPTOR

**FOUNDERS:** Alex Pentland, Anmol Madan, Karan Singh, Ryan O'Toole  
**LAUNCHED:** 2011  
**FUNDING:** $120.7M  
**KEY INVESTORS:** Khosla Ventures, True Ventures

**NEED TO KNOW:** Having more than tripled its revenue over the past year, and attracted $50m in new investment, Ginger’s growth can be credited to its refreshing and on-demand approach to mental healthcare. Having opened up access to millions of people around the world, it’s now doubling down on its DTC offering to meet skyrocketing demand for mental health care at a fraction of the cost.

*For more Therapies see Mental Wellness pg 39, Empowered Health pg 23*
TRAVEL & HOTELS

Wellness tourism, an estimated $919 billion industry by 2022*, has been steadily gaining traction over the past decade – growing more than twice as fast as the tourism industry as a whole between 2015-2017**. Today, health-conscious travellers are demanding everything from full-blown retreats to integrated wellness solutions and facilities. And savvy brands are eager to leverage that momentum.

Transformative concepts are plugging a gap for those wanting to uncover a new level of health, and return home with the tools needed for long-term positive self-care and wellbeing, while health-focused hotels promise to accommodate the new dynamics of the high-performance lifestyle. The one thing these changemakers all have in common is their ability to position wellness as a part of the entire travel experience.

Source: *GWI **GWI
HEAVYWEIGHT

EQUINOX

KEY FIGURE: Harvey Spevak, Chairman
LAUNCHED: 2019
FUNDING: N/A
KEY INVESTORS: N/A

NEED TO KNOW: Equinox’ pioneering hotel in New York reflects consumer thirst for wellness that cuts across the various touchpoints of life. Based on the same philosophy as its fitness clubs, its goal is to meet the needs of those looking to operate at their maximum potential, no matter where they find themselves. It understands how wellness behaviours have become a pivotal part of its customers’ lives and demonstrates how savvy brands can go above and beyond to better serve the needs of their audience.

ESTABLISHED PLAYER

TEMPO

KEY FIGURE: Chris Nasserta, President & CEO
LAUNCHED: 2020
FUNDING: N/A
KEY INVESTORS: N/A

NEED TO KNOW: This brand new wellness-focused hotel chain from longstanding hotel group Hilton is its attempt at addressing the future of travel. The lifestyle brand, which the hotelier says has been curated ‘to serve a growing segment of “modern achievers” seeking a hotel experience that reflects their ambition’, is the latest example of its ability to anticipate what travellers are looking for and deliver unmatched value.

VISIONARY

BLACK GIRL IN OM

FOUNDER: Lauren Nash
LAUNCHED: 2014
FUNDING: N/A
KEY INVESTORS: N/A

NEED TO KNOW: On a mission to change the white-washed face of wellness, Lauren Ash is a multi-hyphenate entrepreneur and founder of Black Girl In Om -- a visionary lifestyle brand synonymous with black women’s wellness. Reinventing the notion of the wellness retreat through transformative city-based events that are more accessible and diverse, the brand recently pushed the boundaries with a virtual retreat featuring spiritual teachings, workshops and cultural rituals.
WELLNESS CLUBS

Rising interest in luxury self-care has resulted in the emergence of all-encompassing destinations where wellness is bolstered by bespoke services including training solutions, recovery, relaxation and healthy social interactions.

These exclusive clubs are attracting an upscale clientele by offering a clear path to tangible health results and the promise of high performance living without sacrifice — a place that bridges the gap between work, rest and play.

Helping to optimise every aspect of their members’ lives, in a time-poor society, clubs like these that are creating hybrid spaces are increasingly finding themselves becoming an integral part of the wellness ecosystem.

Read more about the new wellness clubs marrying fitness with self-care on welltodoglobal.com.

ONE TO WATCH

FOUNDERS: Dr Jonathan Leary, Rhyce Lein
LAUNCHED: 2019
FUNDING: undisclosed

NEED TO KNOW: This ground-breaking new social wellness club in Los Angeles aims to rewrite the rules of self-care and empower consumers to take back control of their health and wellness. Targeting those who want their social life to be enhanced by a healthy lifestyle, rather than being sacrificed, it fuses social interaction and education with self-care to create a new type of destination.
WELLNESS REAL ESTATE & DESIGN

The notion that wellness should exist within the common frameworks found at home, work and recreational spaces, is sparking a new breed of hybrid buildings that are changing and responding to the way we live. Driving this positive change are wellness real estate and design companies that blur the boundaries between wellness and the built environment to create improved health outcomes.

By tapping into the growing demand for more integrative and all-encompassing approaches to wellness, whether that be smart in-home solutions, evidence-based building standards or in-house wellness amenities, these visionaries are creating a new dialogue between experts in building and health sciences. And providing the wellness-focused with the life they’ve always imagined - streamlined, connected and convenient.

There are a lot of confusing pieces to the digital marketing puzzle.

Leave us to connect them – so that your wellness business gets more clients, more often!

LET'S TALK

TAMA
INDUSTRY LEADER

Delos™
Innovate Well

FOUNDER: Paul Scialla
LAUNCHED: 2007
FUNDING: $198.1M
KEY INVESTORS: Cascade Investment

NEED TO KNOW: Recognised globally as an industry leader, Delos is fast becoming a catalyst for enhancing the health and wellbeing of people around the world by improving the indoor environments they live, work, sleep and play in. Informed by years of research and rigorous analysis of environmental health impacts on people, its WELL Building Standard has become influential in creating a new standard for buildings.

FIRST-OF-ITS-KIND

FOUNDER: Bahram Akradi
LAUNCHED: 2019
FUNDING: $45M
KEY INVESTORS: Norwest Equity Partners

NEED TO KNOW: Premium gym operator Life Time Fitness, launched its collection of first-of-its-kind residences in 2019 to leverage growing demand for more integrative approaches to wellness. Designed to inspire a holistically healthy lifestyle, its apartments fuse wellness and connected-living technology to offer a glimpse into the future of a more forward-thinking approach to wellness and the built environment.
2020 INVESTMENT LANDSCAPE

JANUARY
- classpass $285M
- RITUAL $250 M
- SUNDROOM $undisclosed
- THUMBS UP $4.7M
- SIMBA $24M
- peerfit $10M
- CALIFIA FARMER $225M

FEBRUARY
- headspace $93M
- LIVESTRONG $2.5M
- RXBAR $undisclosed
- Gibson $13M
- The Burger Shop $1.6M
- Zappos $28M
- MAVEN $45M
- EQUINOX $undisclosed

MARCH
- lyra $75M
- aliplants $2M
- Impossible $500M
- VAULT $50M
- eQua $28M
- Roxy $1M
- CURA $110M

APRIL
- Aaptiv $undisclosed
- biobeats $undisclosed
- TONAL $45M
- scandermind $27M
- moshi $12M
- Flow $45M
- glofox $10M
- Relish $5M
- HYDRANT $5.7M
- Thriva $4M
- Imperfect Food $72M

MAY
- feedr $20M
- Oatly $200M
- Ginger $50M

JUNE
- Playbook $5M
- BARRY'S $undisclosed
- MIRROR $50M
- Crossfit $undisclosed
- NOW $5M
- RUDE HEALTH $undisclosed

JULY
- LITEBOXER $4M
- Missfits Market $50M
- Tempo $300M
- Perfect Day $32M
- Proper $9.5M
- RO $200M
- FabFitFun $8.6M
- NUGGS $4.1M
- Real $undisclosed

AUGUST
- GYMSTARK $undisclosed
- CARROT $24M
- new co $3M
- MEATS $2M
- Hint $25M
- im possible $200M
- Wink $undisclosed

*acquired for an undisclosed amount
WELLNESS RETAIL

A focus on health and wellness — across ecommerce, grocery and multi-brand retailers — has been steadily rising, as consumers prioritising healthy living look for outlets that can curate the latest products within single destinations. Convenient and accessible, these retail concepts are carving out a niche by offering a choice of specialist products and exclusive brands.

Recognising how wellness and its associated values impact the daily lives of their customers, is what sets today’s frontrunners apart. This is demonstrated through in-store activations, digital content, the cultivation of community and the creation of bespoke experiences that tap into the current trends and behaviours of the modern health-focused and socially conscious consumer.
**PURPOSE-LEADING**

**THrive - Market -**

**FOUNDERS:** Gunnar Lovelace, Kate Mulling, Nick Green, Sasha Siddhartha  
**LAUNCHED:** 2013  
**FUNDING:** $161.90M  
**KEY INVESTORS:** Greycroft, Powerplant Ventures

**NEED TO KNOW:** Thrive Market’s membership-based online market, offering healthy and sustainable products at wholesale prices, launched as a disruptor with a mission of breaking down barriers when it comes to accessing healthy food. The company, which offers free membership to low-income families and other deserving individuals for every paid membership it secures, resonates with consumers choosing to align themselves with brands that demonstrate a purpose beyond profit.

**TRAILBLAZER**

**THE DRUG. STORE**

**FOUNDERS:** Clemens Böninger and Johan Obel  
**LAUNCHED:** 2018  
**FUNDING:** N/A  
**KEY INVESTORS:** N/A

**NEED TO KNOW:** Having entered the medicinal cannabis space after seeing both the potential and misinformation within the CBD category, Clemens Böniger and Johan Obel launched The Drug Store to provide consumers with curated CBD products that are sustainable, ethical and best in their category. A more recent groundbreaking launch on Deliveroo, in which its products are being sold via the delivery platform, highlights the brand’s commitment to innovation within this burgeoning category.

**ONE TO WATCH**

**THE GOODS MART**

**FOUNDER:** Rachel Krupa  
**LAUNCHED:** 2018  
**FUNDING:** N/A  
**KEY INVESTORS:** N/A

**NEED TO KNOW:** Pioneering a new brand of convenience, The Goods Mart stocks healthy upgrades to typical convenience store staples, making better-for-you options easily accessible. A new kind of destination that takes inspiration from craft and farmers markets, it taps into the psyche of consumers who want a bespoke, community-led experience connected by shared values and lifestyle alignment.
The unstoppable rise of yoga has fuelled a boom in studios, apps, apparel and accessories, as a growing number of people turn to the practice in the hope of leveraging its positive health benefits. Modern day iterations of the phenomenon — often a progressive or alternative take on the age-old practice — have captivated audiences around the globe, and continue to pick up momentum.

Repackaging yoga and spiritual self-improvement for the modern consumer, players in the boutique category are setting new benchmarks by creating elevated and accessible experiences that bring communities together. Elsewhere, digital offerings enabling consumers to partake in live-streamed and on-demand classes from their own homes are opening up the practice to new demographics. By embedding yoga more easily into people’s lifestyles these brand’s are shaking up the $12bn industry*.

Read more about modern day yoga embracing digital transformation on welltodoglobal.com

Source: ‘ibisworld’
**GAMECHANGER**

**more yoga**

**FOUNDER:** Shamir Sidhu  
**LAUNCHED:** 2016  
**FUNDING:** N/A  
**KEY INVESTORS:** N/A

**NEED TO KNOW:** The UK’s fastest-growing boutique yoga brand, MoreYoga aims to "fill the gap between village hall yoga and boutiques". The ‘stripped-back’ yoga studio chain has scaled quickly by offering affordable classes at studios conveniently located for people’s day-to-day lives. Recognising that high streets are a crucial part of local economies, the brand plans on taking over empty retail spaces across London to keep them fit for the future.

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**CHALLENGER**

**Y7 studio**

**FOUNDER:** Sarah Larson Levey  
**LAUNCHED:** 2013  
**FUNDING:** undisclosed  
**KEY INVESTORS:** N/A

**NEED TO KNOW:** Y7’s progressive take on an age-old practice quickly captured a loyal following, helping to grow the brand from a free popup to a 13 studio operation. Founder Sarah Larson Levey has become a spokesperson for the success of the boutique fitness movement and continues to push the boundaries by expanding into merchandise, teacher training programs and most recently Y7 Online – a digital platform launched in response to changes in the market accelerated by COVID-19.
INDUSTRY CONVERGENCE & CROSS-POLLINATION

THE FAST-GROWING INDUSTRIES CONVERGING & COLLABORATING WITH WELLNESS CATEGORIES

As demand for wellness-led products and services continues to intensify, we've identified the industries being reshaped by its influence, the category convergence sparking next-gen propositions and the creative brand collaborations that are widening its reach.

FITNESS IS MERGING WITH

- ATHLEISURE & APPAREL
- WELLNESS REAL ESTATE & DESIGN
- CORPORATE WELLNESS
- BEAUTY AND BODY
- BUSINESS TOOLS AND AGGREGATORS
- FESTIVALS AND EVENTS
- EMPOWERED HEALTH
- NUTRITION AND SUPPLEMENTS
- SLEEP
- TRAVEL & HOTELS
- WELLNESS CLUBS
- WELLNESS RETAIL
- MINDFULNESS & MEDITATION
- MEDIA & PUBLISHING

BRAND COLLAB: Boom x Apex

Apex, a recent entrant into the connected fitness equipment category, recently enlisted boutique fitness brand Boom Cycle to create exclusive classes for its users. The collaboration demonstrates the opportunity for connected fitness brands and physical operators to work together to create an omnichannel offering that targets a wider audience.

CATEGORY CONVERGENCE: Fitness Meets Beauty & Body

Selfcare by lululemon - a line of personal care products designed to create solutions for athletes’ needs - bridges the gap between sweat and everyday life. The collection, which includes dry shampoo and moisturiser featuring sweat-wicking polymer and a menthol-like ingredient to cool, showcases how brands in the beauty and body space can add value to their products by catering to the specific needs of health-conscious consumers.

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TECH IS MERGING WITH

- FITNESS
- EMPOWERED HEALTH
- NUTRITION AND SUPPLEMENTS
- SLEEP
- THERAPIES
- MENTAL WELLNESS
- YOGA
- MINDFULNESS & MEDITATION
- F&B, ATHLEISURE & APPAREL
- BUSINESS TOOLS & AGGREGATORS
- THERAPIES
- WELLNESS CLUBS
- CORPORATE WELLNESS
- FINANCIAL WELLNESS
- MEAL DELIVERY & RECIPE KITS
- WELLNESS REAL ESTATE & DESIGN
- SPIRITUAL WELLNESS
- PERSONAL CARE
- SEXUAL WELLNESS

INDUSTRY CONVERGENCE & CROSS-POLLINATION

BRAND COLLAB: Oura Ring x Clue

Weavers of sleep tracking ring Oura can sync their device with period and ovulation tracker Clue to unlock insights about how their hormones and quality of sleep impact one another. Connecting the dots between sleep, mood and cycle, the partnership points to a future where tech-enabled wellness brands partner to empower consumers to better track their wellbeing.

CATEGORY CONVERGENCE: Tech Meets Nutrition & Supplements

Subscription-based, bespoke supplement service Bioniq is one of a growing wave of supplement brands utilizing AI and other groundbreaking technology to provide a more personalised offering. By becoming part of the wider lifestyle choices and habits of its health-conscious customers, it has the potential to anchor itself as an ongoing, evidence-based and interactive way for consumers to bridge the gap between intention and action.
INDUSTRY CONVERGENCE & CROSS-POLLINATION

CBD IS MERGING WITH >>>>

- F&B
- BEAUTY AND BODY
- ATHLEISURE
- NUTRITION AND SUPPLEMENTS
- SLEEP
- TRAVEL AND HOTELS
- WELLNESS CLUBS
- WELLNESS RETAIL
- YOGA
- THERAPIES

CATEGORY CONVERGENCE: CBD Meets Athleisure

CBD-infused activewear brand Acabada aims to help fight soreness and promote healing by addressing the use of CBD through a different lens. By physically infusing CBD into its garments, its product lives at the intersection of fashion, fitness and wellness, argues the brand.

BRAND COLLAB: Casper x Plus Products

In a savvy move to expand its brand ecosystem, sleep lifestyle startup Casper recently partnered with CBD company Plus Products to create a line of CBD edibles. The melatonin and CBD-infused sleep gummies highlight the growing trend of CBD products being positioned within new wellness verticals, as well as helping to further Casper's goal of becoming "the Nike of Sleep".
TRAVEL IS MERGING WITH

- WELLNESS REAL ESTATE & DESIGN
- BEAUTY & BODY
- MEDIA & PUBLISHING
- SLEEP
- MENTAL WELLNESS
- MINDFULNESS & MEDITATION
- F&B
- YOGA
- FITNESS
- NUTRITION & SUPPLEMENTS
- MENTAL WELLNESS

BRAND COLLAB: Headspace x Various Airlines

By creating an in-flight Headspace channel and audio exercises to help passengers relax and get some sleep. Headspace reaches over 800 million passengers a year across twelve airlines. The initiative highlights the growing importance of wellness as an integrated and continual part of the end-to-end travel process, and highlights the opportunity for wellness brands to reframe their offerings to meet the complex demands of the wellness traveller.

CATEGORY CONVERGENCE: Boutique Fitness Meets Wellness Retreats

From Equinox and BLOK to SoulCycle and Third Space, there has been a boom in fitness operators repackaging their offerings to compete within the wellness travel sector. Creating immersive experiences beyond the four walls of the studio, these retreats are enabling fitness brands to further position themselves within the wider lifestyle space.
INDUSTRY CONVERGENCE & CROSS-POLLINATION

HEALTH IS MERGING WITH >>>>

- FITNESS
- CORPORATE WELLNESS
- NUTRITION & SUPPLEMENTS
- WELLNESS CLUBS
- PERSONAL CARE & SEXUAL WELLNESS
- SLEEP
- THERAPIES
- WELLNESS TRAVEL & HOTELS
- WELLNESS REAL-ESTATE & DESIGN
- MENTAL HEALTH
- MEDITATION & MINDFULNESS

BRAND COLLAB: Hims & Hers x Capsule

This partnership between digital pharmacy company Capsule (which delivers medications to homes) and digital health platform Hims & Hers means that Capsule’s digital pharmacy is now available to all Hims & Hers primary care and telemedicine customers in cities that Capsule operates. The move aims to widen access to health and wellness solutions.

CATEGORY CONVERGENCE: Boutique Fitness Meets Medicine

London-based boutique fitness operator Ten Health & Fitness is bridging the gap between the fitness sector and the medical community with TenClinical, a bespoke, scientifically proven and clinically approved exercise prescription. Designed for clients suffering from medical health issues, the programme is an example of how the fitness industry is shaping the future of the healthcare industry.
Welltodo is a leading global platform dedicated to helping people build incredible businesses and careers in the wellness industry.

> We arm brands with wellness industry trends and insights focused on food & beverage, fitness, technology, athleisure, travel and beauty.

> We coach and mentor wellness entrepreneurs.

> We help companies grow dedicated teams.

> We support and nurture a pool of passionate candidates to find fulfilling jobs in wellness.

> We share stories through live events and our podcast, The Business of Wellness.

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