

FIVE
for
25

5 Marketing
Trends to Watch
in 2025

Is Wellness Well?

The Rise of the Anti-Optimizer

"Wellness" has become a catch-all for self-care, fueled by better technology, lack of institutional resources, personal accountability, and COVID. The result? A \$6.3 trillion industry⁸ on the rise. An industry projected to grow at a whopping rate of 24% next year.⁸

\$6.3T

Wellness industry has grown due to better technology, lack of institutional resources, personal accountability and, of course, COVID

So far...so good? There are headwinds coming. Americans spend an average of \$5,300 per year on wellness and yet only 1 out of 3 rate their physical health as "very good."⁹



What's wrong with this picture?

Wellness is increasingly portrayed as a luxury. Wellness has reached a tipping point of low access, affordability and complexity. Health choices now express identity, signaling wealth, access, status, and sometimes even politics. Health is no longer something you do, it's something you are.

Wellness anxiety is real. The power (and responsibility) of having control of your health is that, although 1 in 3 people feel like with research they can know as much as a doctor, a full 41% regretted a health decision made on misinformation¹⁰. Loss of control increases anxiety and feeling overwhelmed – 34% of American adults report feeling anxious or depressed¹¹.

In reaction to this pressure we see a new group emerging, the Anti-Optimizers. A small group now, this cohort is prioritizing mental health over optimal health outcomes. We see this reflected in the health care practitioner influencer world, where a new wave of debunking wellness trends is emerging. Think of this as the wellness version of de-influencing.



Action points:

Wellness remains a massive opportunity but be aware that a balanced, thoughtful approach will safeguard your brand against behavioral headwinds. Keep these in mind:

1. Broad awareness only adds to the noise – and to the anxiety. Savvy marketers need to create experiences that are discoverable and understandable.
2. Wellness shouldn't be a competitive sport. Access, education, and empathy should be central in your communication approach to breakthrough in this swelling space.
3. Brands that help consumers reject the complex care ecosystem and still find betterment will be the quickest to win in this new wellness era. Our prediction, the first brand to de-influence their own category will be the quickest to create the new treatment paradigm.





From Grey to Golden:

The new power base

If you're not paying attention to the 50+ age segment – REALLY paying attention – rethink your plans. This group holds about 52% of the country's net wealth and accounts for up to 30% of consumer spending, yet only 10% of marketing campaigns target them⁴.

That's only one aspect of the opportunity. The catalyst here is how this generation is redefining the aging process.

52%

Of the country's net wealth is accounted for by this group

Imagine everything you know about aging – and then forget it. A Taco-Bell-themed retirement community, the Golden Bachelor, and 71-year-old lingerie models are just the beginning. Here’s what’s happening:

Grey to Golden will oversee the largest wealth transfer in history, and they’re going to enjoy it by spending on experiences rather than things. A full 65% of this group plan to travel this year⁵.

Pursuit of Happiness is Real. The rise in Grey Divorce, in second or third careers, and in super fitness means they’re investing in their own happiness at every stage of their lives.

They want to be heard, whether it’s a vote or a post. Check this - Grey Influencers see engagement rates averaging around 7.3%, which is higher than the 5.3% engagement rate for influencers targeting younger demographics⁶, and in our latest Meaningful Brands™ Study, a whopping 73% will take a stand on issues that are important to them.

They’re Brand open and Brand loyal. They will absolutely try new brands, but once they lock in and love a brand, they’re 15% more likely than other generations to remain loyal^{7,8}.



Action points:

Aging fiercely isn’t aging out – and brands that allocate more resources to engage 50+ will reap the rewards of a passionate and vocal group. Keep these 3 things in mind:

1. They thrive on being heard – help them feel their influence.
2. They don’t want to wait to enjoy something. Instant gratification is a big bonus.
3. Grey to Golden relishes breaking conventions. Join them on the journey to rewrite the aging rulebook and you’ll only make them more loyal to your brand.





Digital Detractors:

Are we at the start of Mindful Media?

57%

of Gen Z took a digital detox in 2023

Peak media. Many sources say we've reached it – we simply can't spend any more time with media, which means now, "share of media time" is key for marketers. That has a lot of implications – but one we're watching closely is the growing disenchantment consumers have with social platforms.

We know social media inspires a love-hate relationship, with many younger cohorts seesawing between dopamine-fueled belonging and mounting anxiety. But...have people really left platforms in droves? Is digital detoxing real?



Here's why we think 2025 will be a turning point for Digital Detractors:

1

Audience regulation is heating up under growing public pressure. Recent cases include Australia's ban on social media for under-16s and Canada's ban on TikTok.

2

Gen Z are projected to change their platform loyalties, with Snap, X, and TikTok at flat to negative growth¹. Here's why: nearly half of Gen Z wishes these particular platforms were NEVER INVENTED². That's a lot of disenchantment.

3

Detoxing and disconnecting is real. A full 57% of Gen Z states they took a digital detox in 2023 and 63% planned to in 2024—the highest of any age cohort³. If they aren't quitting altogether, they're taking regular steps to limit their exposure or curating platform experiences more to their needs. They're muting chats, blocking followers, removing the app from their home screen, and setting time limits for app usage.



Action points:

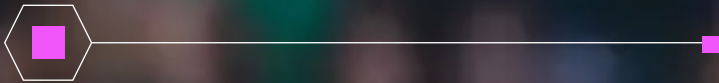
The social media paradigm is changing rapidly, particularly with Gen Z. It matters where your brand shows up. In social media, it might be THE most important place to be as mindful (and meaningful) as possible. Smart marketers will be very clear in how they behave on platform:

1. Consider when your brand is welcome on platform and when IRL is a better opportunity to forge deeper connections.
2. Choose belonging, not FOMO. Context, content, tone of voice, who is representing your brand, frequency of posting: all of these elements matter to reinforce a more mindful presence for consumers.

Rewriting Herstory

The Year of Sportswomanship

Women's sports IS big business. In 2024, that's inarguable. But is it the same business playbook that brands have come to know?



Global women's professional sports revenue quadrupled in just three years to

\$1.28B



We think the women's sports playbook is fundamentally different, and powerful, in a variety of ways:

1

It's not just about the viewership, it's about the conversation. Let's take the WNBA as an example: social discussions increased 471% between 2020 – 2024, vs. a 200% increase in viewership.¹² The real action happens in conversation. From Megan Rapinoe talking about equal pay to Angel Reese announcing foregoing her final year of college eligibility to enter the WNBA, the discourse goes far beyond the game.

2

Women's sports are breathing new life into declining platforms. Live sports help keep television alive. Meanwhile, global women's professional sports revenue quadrupled in just three years, from \$320M in 2021 to \$1.28B in 2024.¹³ The power has shifted, enabling women's sports organizations and athletes to dictate their terms.

3

Esports is already part of the package. Today, women's sports viewers are 3x more likely to be interested in eSports than they were in 2020, and Twitch has the highest engagement among women's sports watchers, with 57.2% of watchers using the platform.¹⁴ Women's sports already comes with its own communications ecosystem.



Action points:

It's critical to test all assumptions about what's right for women's sports vs. the existing playbooks. Here's what we see for the new playbook:

1. If it happens in culture, it happens in women's sports. Women's sports not only reflect culture but actively shape it. If your brand is in culture, it's in women's sports. Full stop.
2. This is both a fandom and a movement. And for some fans and athletes, it isn't as new as the recent movement would lead us to believe. Women seeing themselves on one of the world's greatest stages is far more powerful than the established fandoms of men's sports. The audiences learning to engage with women's sports media is driven by emotion, not the need to mimic existing ways of enjoying sports.
3. Women have brought back true "sportswomanship." It's a narrative and new code of conduct that suggests women can have and be more. There is an ethical compass that suggests women can treat each other as competitors, colleagues, teammates, fans, agents, or followers, and it's GOOD for business and society.





Creator Sapiens

The Evolutionary Leap in the Influencer Market

If we've reached peak media, we're close to reaching peak influencer. The influencer market is forecasted to grow another 16% YOY on a \$8.14B base in 2024¹⁵ ... but the cracks are showing. With this growth comes fragmentation, inflation, and de-influencing.

16%

Expected Influencer Growth YOY on a \$8.14B base in 2024

This is happening for one simple reason: marketers mistake people for media choices. More importantly, followers know when they're being sold to:

The gap between influencers and creators is widening. Influencers are starting to be seen as a broad marketing channel - not a person. Creators, by contrast, focus on content, driven by their expertise, credibility, and ability to serve a community of kindred spirits.

De-influencing is still a thing. The views for de-influencing of content have increased 6x YOY as of the first quarter of 2024.¹⁶ What's driving de-influencing is transparency – de-bunking the influencer marketing machine. And it's resonating with audiences.

Follow Community guidelines. Creators are a powerful representation of community. Look at the cross-cultural creator space, where Black followers are 50% more likely to seek out diverse media¹⁷, and are nearly twice as likely to create content to share with other Black followers. Where you show up and what you say as a brand in a community space is critical - 61% of followers say they have unfollowed an influencer because of their support of inappropriate brands.



Action points:

Rebooting your brand's approach – from influencer to creator – is a powerful move that requires a mindset shift. Creators can be powerful voices for your brand – but their voice is their power.

1. Become a patron of their arts. The “vendor” mentality is not doing you or your brand any favors. These people make great content, and regardless of their platform, need to have editorial control.
2. Understand the community expectations. Getting it right with the community and the right fit for your brand is worth the time to curate and choose.
3. Don't launch and leave. We can't underline the word community enough. Once you're in, it's a commitment. Be sure you have the wherewithal to see it through – it can only benefit your brand in the long run.

Want to learn more about how these trends will impact your brands in 2025?

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