

HEALTH IS A FEELING

What we did

Culture Scape



- ▷ Narrative analysis
- ▷ 50+ sources
- ▷ Current cultural context of health & wellbeing

BAMM Survey



- ▷ US, UK & MX
- ▷ 2000 respondents total
- ▷ Age 16+
- ▷ 10 min survey
- ▷ Advanced analytics:
 - Factor Analysis
 - Correspondence mapping
- ▷ All fieldwork:
May - June 2026

BAMM Ethnography



- ▷ n=7
- ▷ 4US, 3UK
- ▷ In-home and their wellness spaces
- ▷ Ages 22-52
- ▷ Mix of 'body up' vs 'optimizers'



How do you feel?



Would you feel better with this?





Gluten-free, non-alcoholic beer infused with functional mushrooms and other adaptogens including Lion's Mane, L-Theanine, and Ashwagandha

Or these?



Xen Earbuds

Reduce stress and improve sleep through gentle Vagus Nerve Stimulation

Or this?



New BMW i3

Re-engineered cabin materials for higher air quality & olfactory experience

Or some of this?



MUD\WTR

Coffee made from organic cacao, masala chai, adaptogenic mushrooms

Health & Wellness is Everywhere.

So we wanted to understand
what it means today, and where it's going.



Three Wellness Stories

1 Body Up Wellness

2 Wellness Is The Signal

3 Rest Envy



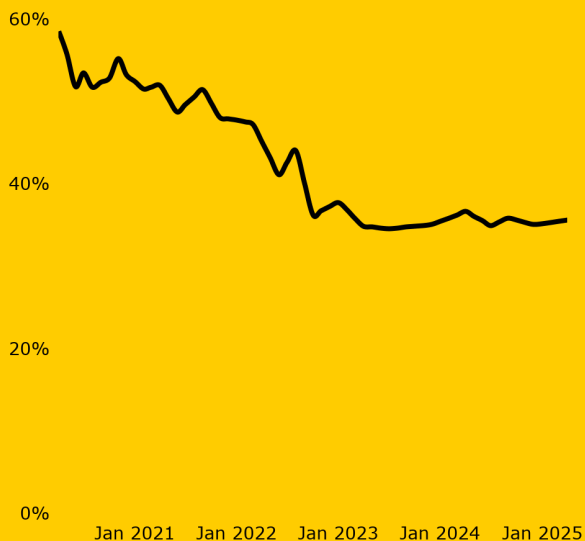
#1

Body Up Wellness



Science appears to be in doubt

Trust in Scientists (US)

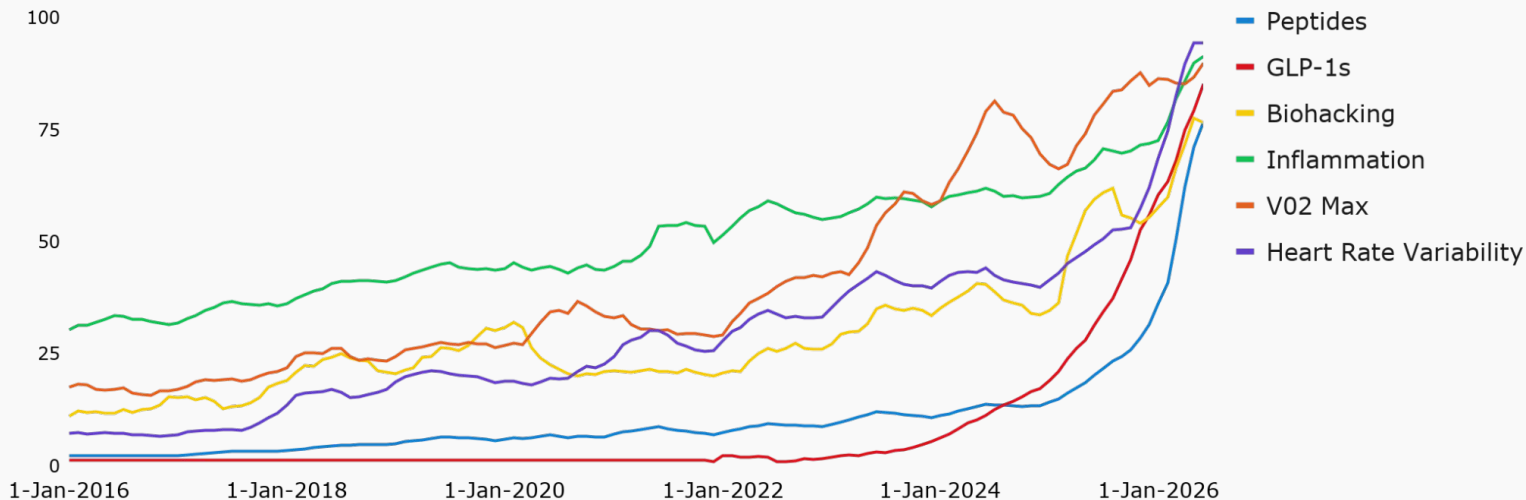


Source: Harvard Medical School



Yet interest in "science" based wellness has never been higher

Google Search Trends (US)



People like these new solutions

71%

View **Ozempic**
Positively

UK: 63%; US: 77%; MX: 70%

76%

View **Peptides**
Positively

UK: 74%; US: 78%; MX: 74%

74%

View **Regulating
Their Nervous
System** Positively

UK: 77%; US: 83%; MX: 80%



What is going on?

People Are Rejecting:

Top Down Institutional Science That tells you what to do

*Public health guidance, dietary guidelines, regulatory bodies,
mainstream medicine's risk-averse caution*

People Are Embracing:

Body Up Self-Oriented Science That works with how your body works

*GLP-1 receptor agonism, peptide signaling,
nervous system regulation, VO2 Max tracking*



FROM

"Eat less and
exercise more"

TO

"GLP-1s go straight to
the part of my body that
controls hunger"



It's populism in the health space

"I trust a doctor and I trust my body. If what I hear from the doctor is not what my body is telling me, I look for another doctor, or I look it up online, or I try to figure it out myself."

Alice, Part-Time Office Worker,
US, 40



It's A Self Experimentation Ethos

Discovering hacks vs. obeying authority

Verifying with your own body,
your own labs, your own results

More trustworthy



It's guided by how you feel and what your body tells you

Which approach to health and wellness do you relate to more?

22%

Data and metrics

78%

How my body feels day-to-day

21%

A machine to optimise and fix

79%

A living system to listen to and nurture

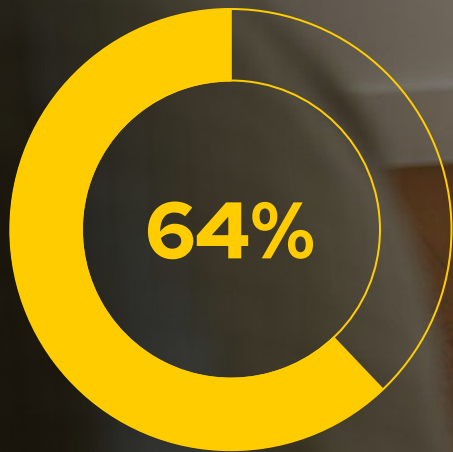
31%

Disciplined, structured, goal-oriented

69%

Flexible, intuitive, focused on feel





I trust my own body
more than anything else

66% UK, 75% US, 51% MX.



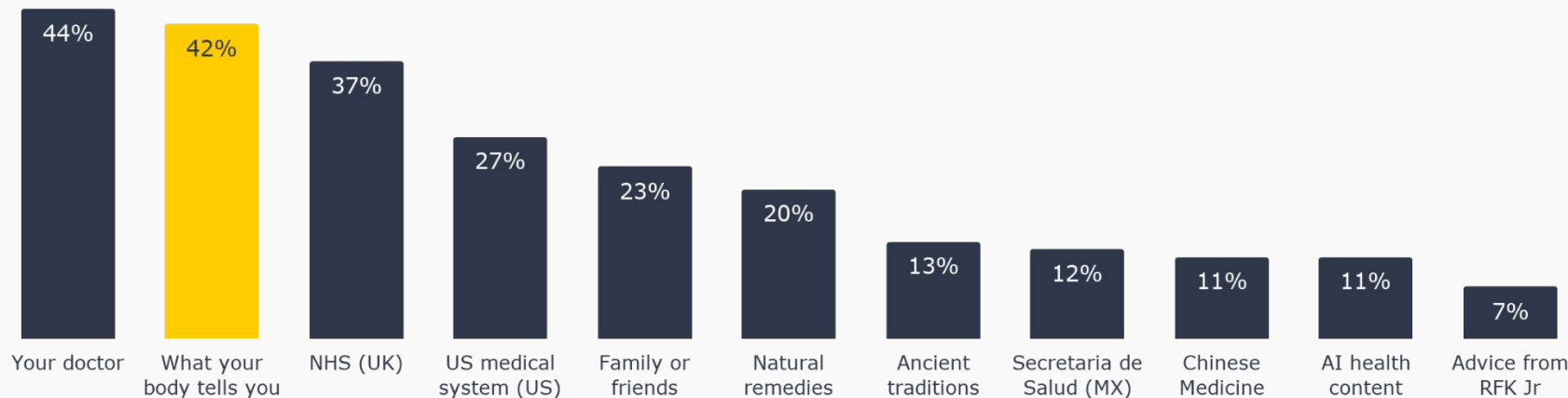
“You feel like you need to do all these things. Now it's like, 'no, I'm going to just listen to my body.'”

*Sian, Project Manager,
UK, 41*



People are relying on both: Their doctor (thankfully), but also themselves, how they feel≈

Trust the following when it comes to health



Base: Those who saw the option (e.g. British respondents for the NHS)
Source: BAMM 2026



It's about putting your body rhythms first



The case for timing medical treatments to daily circadian rhythms

A growing field of research suggests that some medical treatments, such as cancer therapy or vaccines, might be more effective when given at certain times of the day

Your body clock has seasonal rhythms and it matters for vaccines

We think of our body clock ticking over on a 24-hour cycle, but evidence is growing that it has seasonal rhythms, which could affect our response to vaccines





Important to fit
with natural rhythms

UK: 82%; US: 86; MX: 88%



It's about stacking wellness around 'my life'

Listen Up, Lazy Girls: Wellness Stacking Is All The Rage RN – But Is It The Ultimate Self-Care Hack?

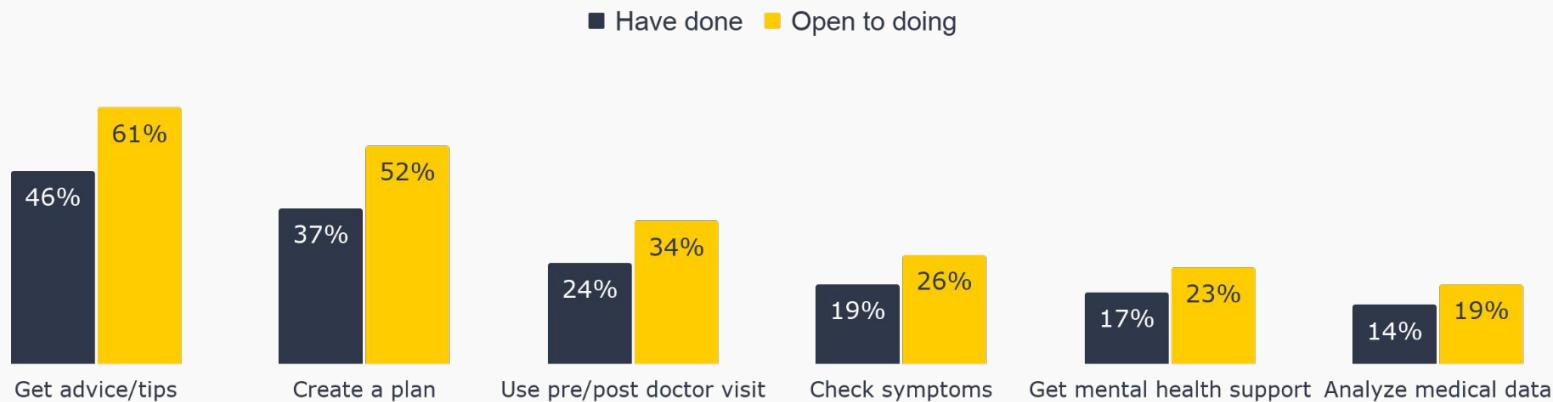
What Is Peptide Stacking—And Is It Healthy?

The 5-3-1 Rule Might Be the Wellness Habit You're Missing



And it's about using AI to shape guidance to 'my needs'

How using / open to using AI when it comes to health



A close-up, profile shot of a young woman with blonde hair, looking down at a smartphone held in her hands. She is wearing a white top and a small gold hoop earring. The background is blurred, showing an indoor setting with a desk and a computer monitor. The text is overlaid on the right side of the image, enclosed in a yellow L-shaped bracket.

"I uploaded [to Chat GPT] my the results of my blood work and it says, yes, it's low. Like, look, I have to supplement, I have to work out what is safe to take? What should I avoid? All the supplements that I had... I learned through AI by asking what should be a few things that I could supplement now."

Katie, Tech Marketer, US, 36

A yellow L-shaped bracket graphic located at the bottom right of the image.



Body Up Is Also A Signal To Others

Knowing the body mechanism, the
peptide stack etc signals insider
knowledge and independence

"I've done my own research" and
"I'm not a follower" as identity



#2.

Wellness Is The Signal



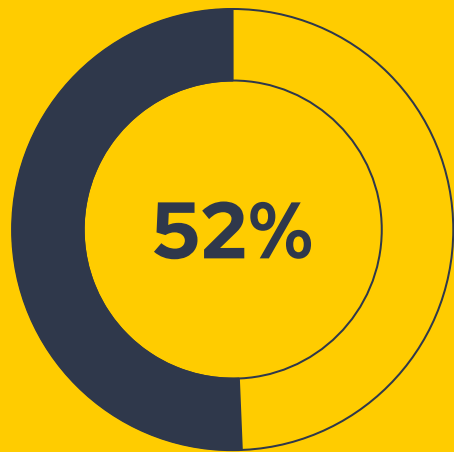
Luxury brands have been moving harder into wellness



Guerlain Spa, NY (Opened 2025)

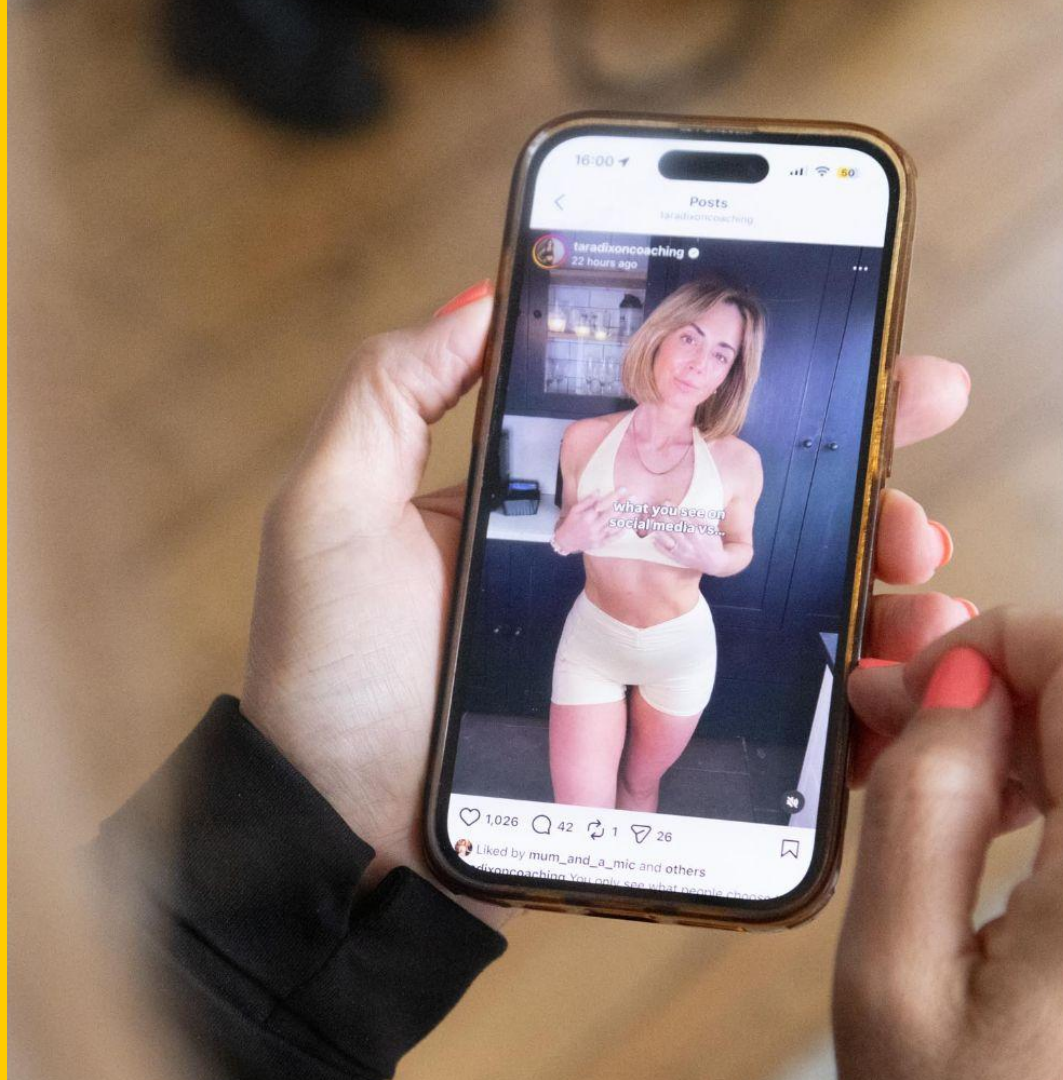


Dior Garden of Dreams, LA (Opened 2023)



Millennials: Wellness has become a status symbol

UK: 48%; US: 64%; MX: 45%



**Wellness has always been
a class marker**



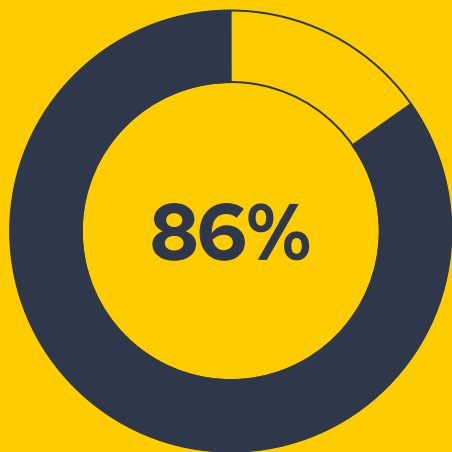
FROM

Private tennis clubs, spa
retreats, juice cleanses,
gym membership

TO

Instagrammable micro
objects & rituals: supplement
stacking, peptide use, eye
patches, glucose monitoring

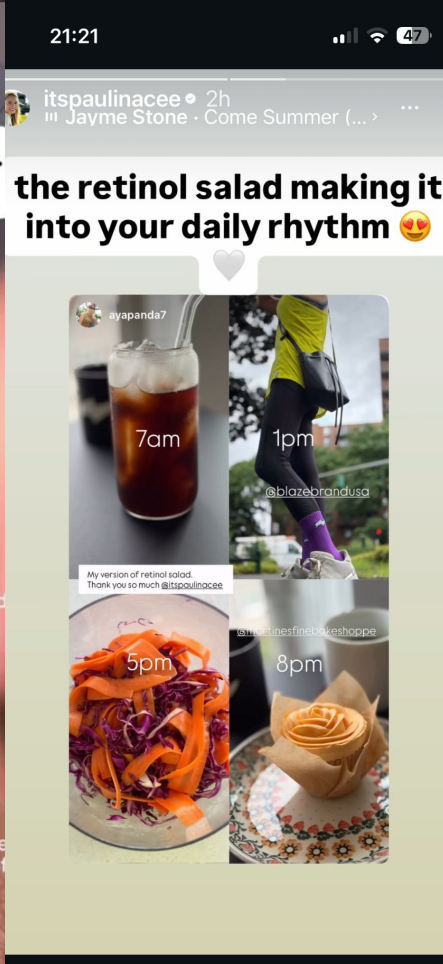




It's important
to *look* well

Source: BAMM 2026





In this world, wellness rituals become visual performance



And the 'equipment' becomes the proof, the aesthetic

“I got this recently, but I don’t really use the app that comes with it, too much faff.”

Ido, Student, UK, 22



**But this
creates a
tension**

**The more status
becomes
performable &
purchasable**

**The faster the
signal gets
democratized
& devalued**



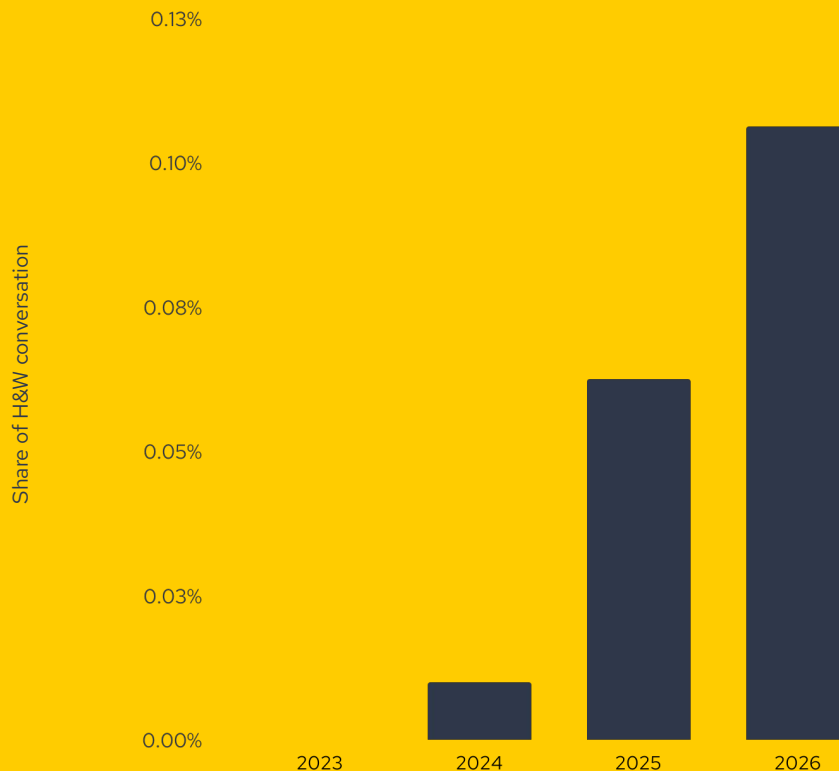
Longevity is the correction

It's the one signal that can't be faked with a purchase.

It can't be bought outright.

It make status scarce again in a world in which equipment and rituals are accessible to all.

#Longevity conversations in social media





"The pursuit of overcoming death will likely be available only to the wealthy, creating an unprecedented biological gap between the rich and the poor."

Yuval Noah Harari,
21 Lessons for the 21st Century

Bryan Johnson
Tech Billionaire



Longevity is a luxury,
inaccessible to most people
(Age 35+)



「
*"He received IV drips of vitamin cocktails,
plus oxygen treatments, costing \$250-\$300
a time. He requested blood tests every six
months checking 15 to 20 biomarkers"*

Jason Wood, As Reported in the Guardian

」



\$20,000

Starting price for Fountain Life Longevity Clinic Membership

Includes whole-body MRI scans, genetic testing, comprehensive health assessments, hormone balancing, stress management and regenerative medicine, including stem cell therapy





**Conspicuous
Self Discipline**

**Vitality
and control**

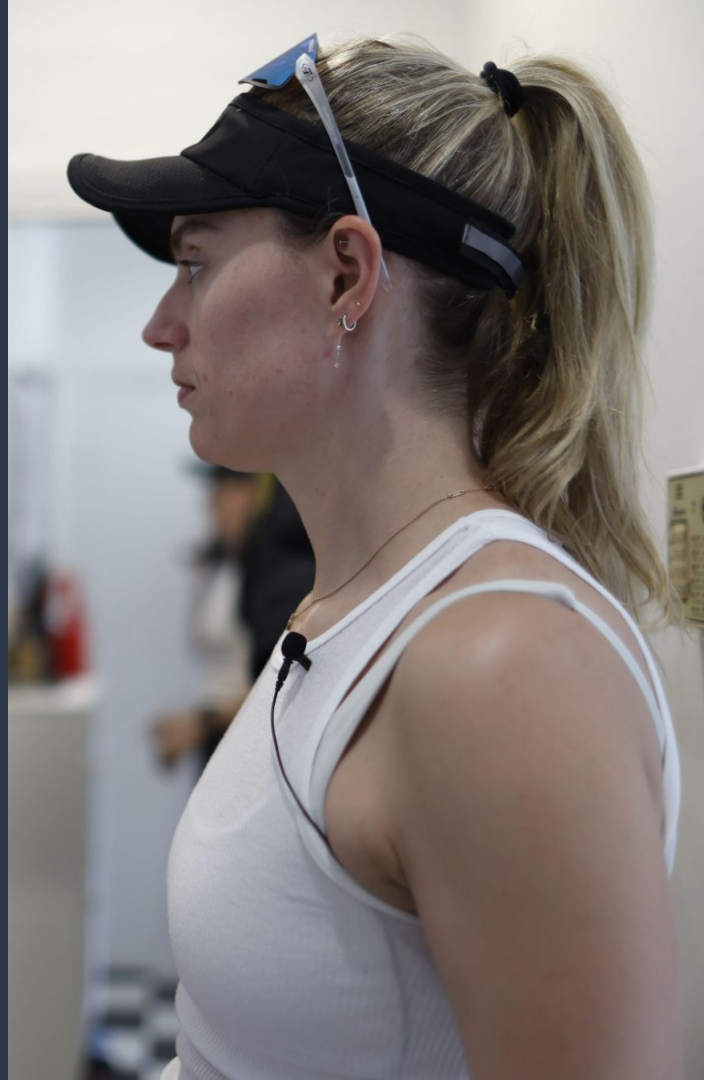
This all comes at a cost

Once wellness is performance versus a state, you can never actually arrive.

It turns wellness into an anxiety engine versus a relief valve.

"Part of my ambition is.. there's a part of me that's like, 'You're not good enough.' And so that's what's driving it... I would like to give it a reason to shut up."

Katie, Tech Marketer, US, 36



#3.

**Rest
Envy**



"There are way easier places to work, but nobody ever changed the world on 40 hours a week."

Elon Musk

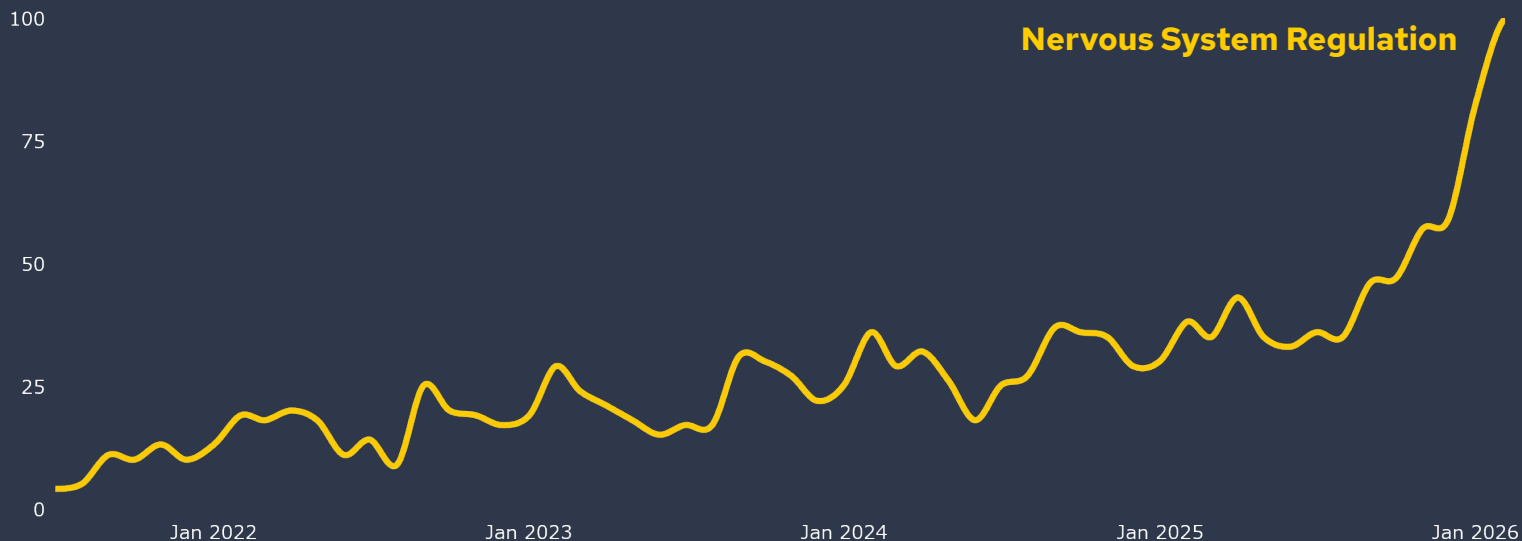


**But there's been
a burnout backlash**



Alongside a Body Up focus on the importance of nervous system regulation, and the impact of stress

Google Search Trends (US)



Nervous System Regulation

Jan 2022

Jan 2023

Jan 2024

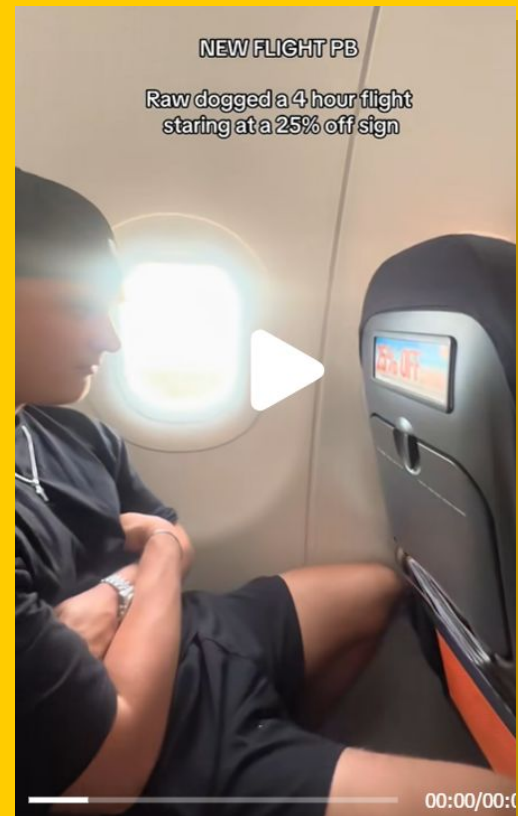
Jan 2025

Jan 2026

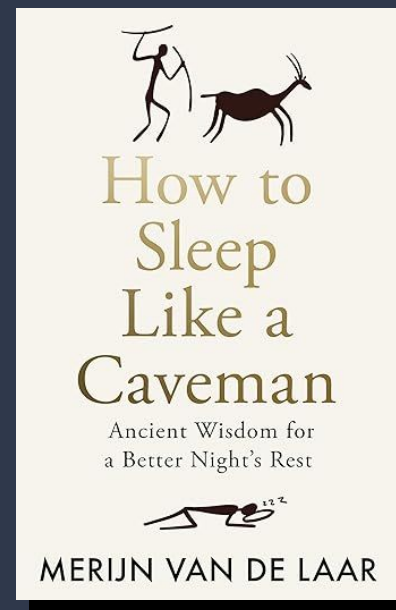
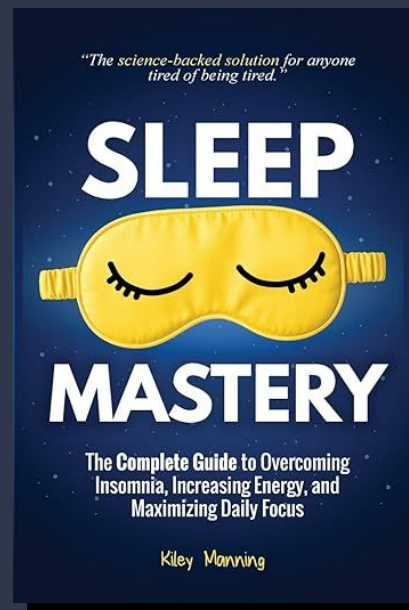
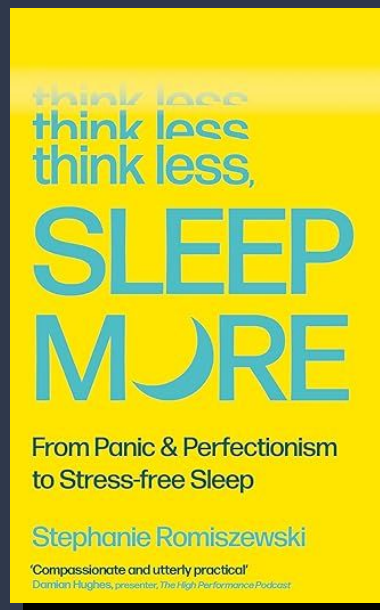
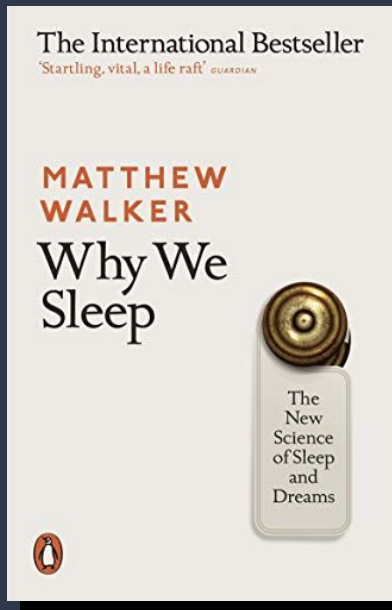
With growing awareness of the attention economy's contribution to stress

Silent Walking: Why Walking Without Music or Podcasts Might Be Exactly What You Need

'Doing nothing was a lot harder than I thought': Gen Z is now 'rawdogging' boredom — here's why it's good for them



And a growth in the science & narrative around sleep



**Sleep and rest have shifted to being
seen as enhancing productivity**



FROM

Hustle culture, I'll sleep
when I'm dead

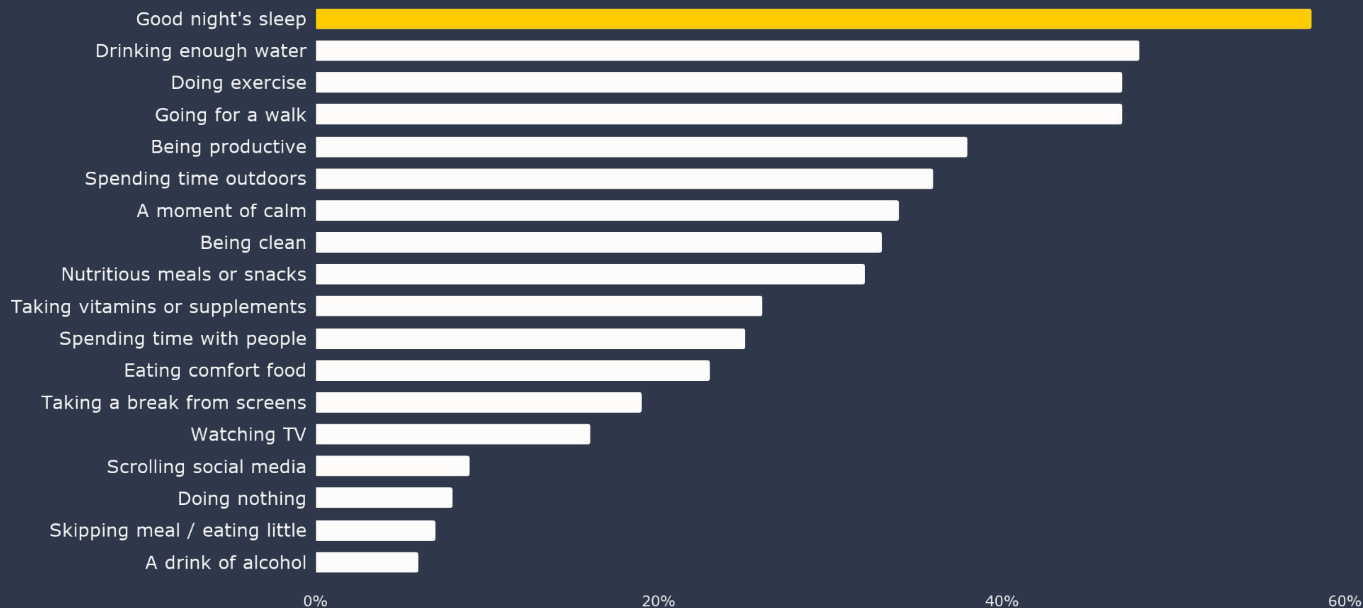
TO

Rest is productive,
recovery is the work



Sleep is what makes people feel most healthy

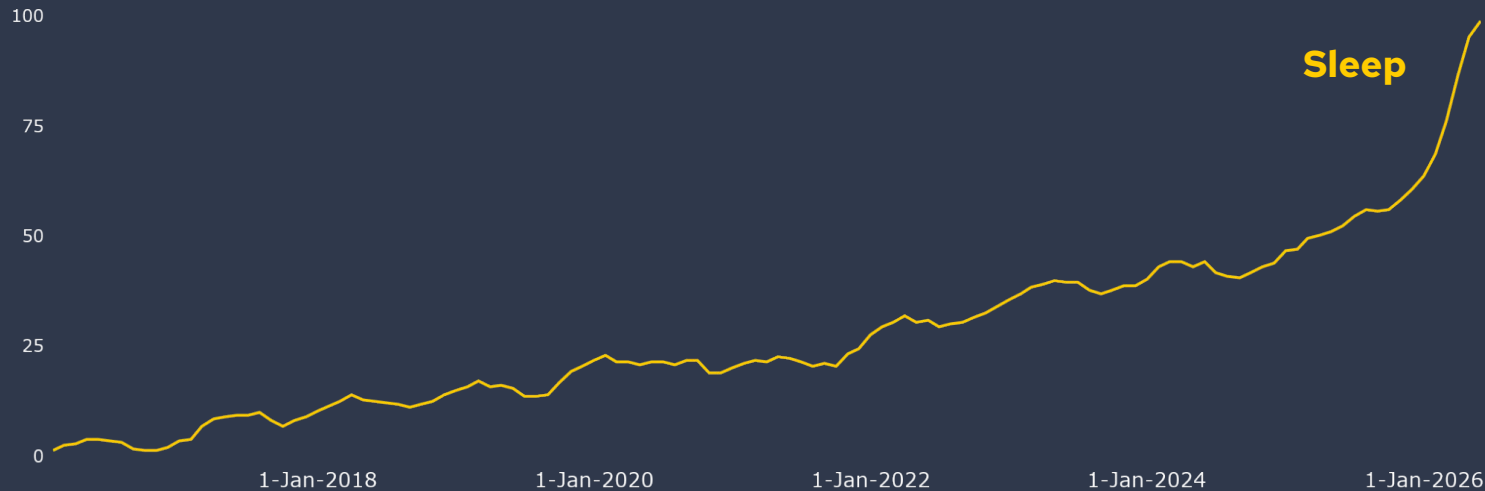
Make you feel healthy during day



And people are increasingly interested in sleep

Google Search Trends for 'Sleep'

(US, indexed to Jan 2016)



Source: Google Trends



Sleep today has a hierarchy



Sleep Luxury

Being so secure you don't need to optimise at all. Sleeping without tracking. Waking without alarms. Your life is structured such that rest happens naturally.

Sleep Optimisation

Tracking devices. Expensive mattresses. Climate-controlled bedrooms. Supplements. Sleep coaches. Blue-light-blocking glasses. The full apparatus of the wellness industry

Sleep Maintenance

Average people trying to get by with basic sleep hygiene. A regular-ish bedtime, eye masks, white noise machines.

Sleep Poverty

Working multiple jobs. Noisy housing. No control over schedule. Caregiving responsibilities that fragment sleep. Economic precarity that makes rest impossible. This is the majority.



It goes further than sleep, it's the idea of 'deep rest'

I always felt guilty when relaxing – 'deep rest' has changed my life

After a lifetime struggling to switch off, I've finally learned the art of doing nothing -and feel like I can breathe again

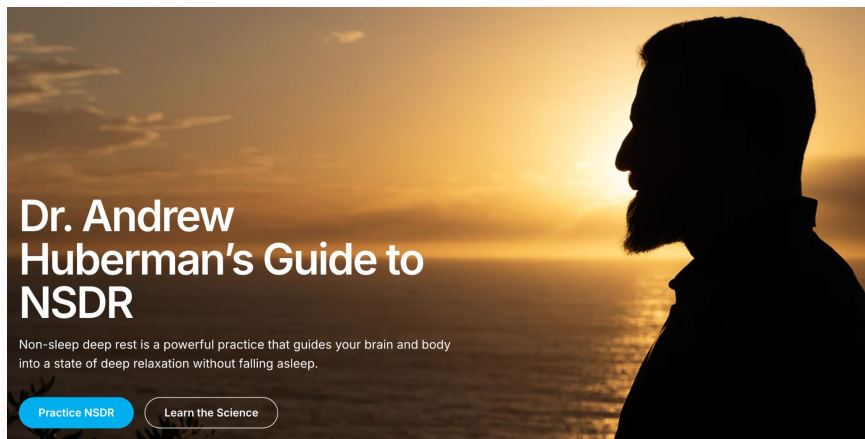
January 16, 2026 7:00 am (Updated 3:19 pm) • 8 min read



The Washington Post

Silent retreats are surging in popularity. Religion is optional.

The growing interest in meditation and contemplation cuts across faith traditions as many seek escape from technology and daily stress.



Dr. Andrew Huberman's Guide to NSDR

Non-sleep deep rest is a powerful practice that guides your brain and body into a state of deep relaxation without falling asleep.

[Practice NSDR](#)

[Learn the Science](#)

*"People do not only
envy sleep. They
envy having enough
ownership of their
lives that sleep,
leisure and personal
restoration do not
have to compete
with one another."
Alice."*

Alice, Part-Time Office
Worker, US, 40



THEN

Stress Envy

Surviving on little sleep
is the status symbol

NOW

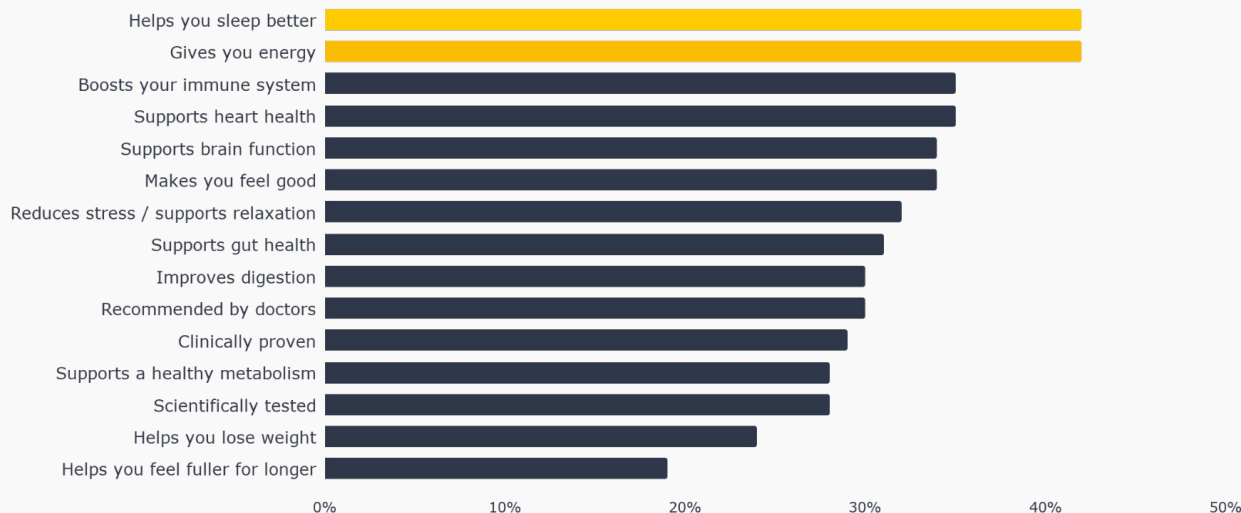
Rest Envy

Sleeping 8 hours is
the status symbol



Improved sleep is a top wellness product benefit people want, though they also do want energy

Appealing if a product could deliver it effectively



HELP ME REST

GIVE ME ENERGY



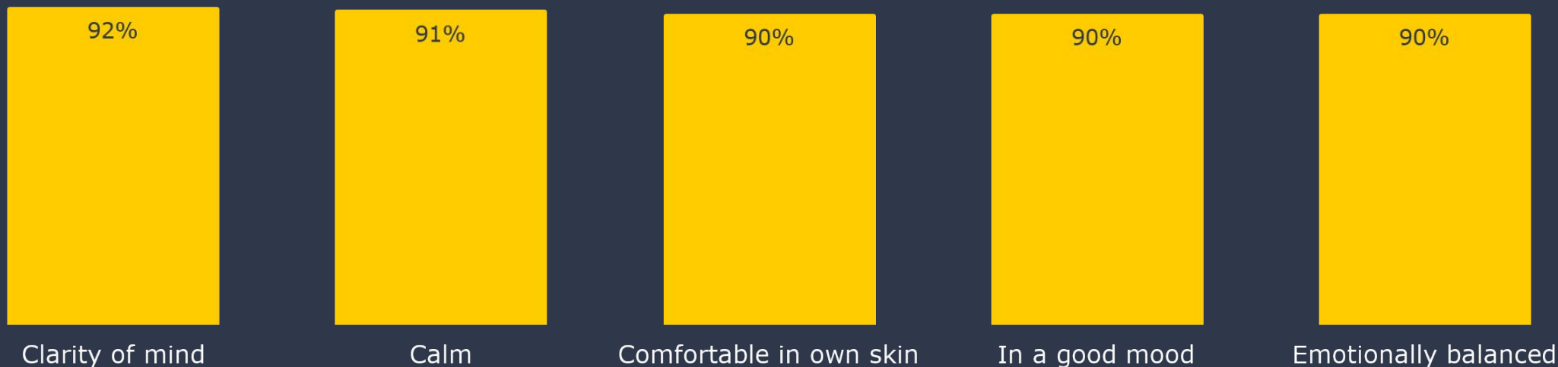


Energy + Rest (daily rhythm partners)



People want to feel clear, calm, comfortable, and in a good mood

Importance of feeling the following (top 5 from list of 16)

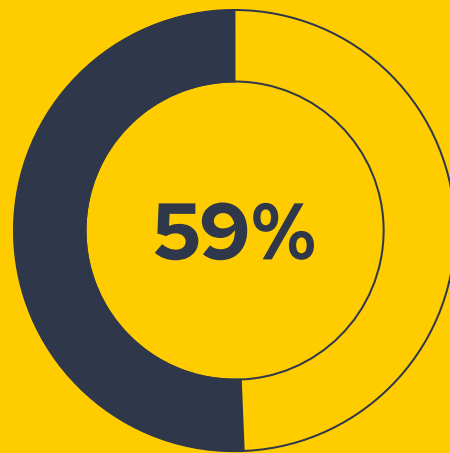


"Once you've got clarity you can get creativity, you can get efficiency, you can do bigger picture thinking."

Reshma, Spiritual Coach and Sound Healer,
UK, 52



People are willing to pay to feel good



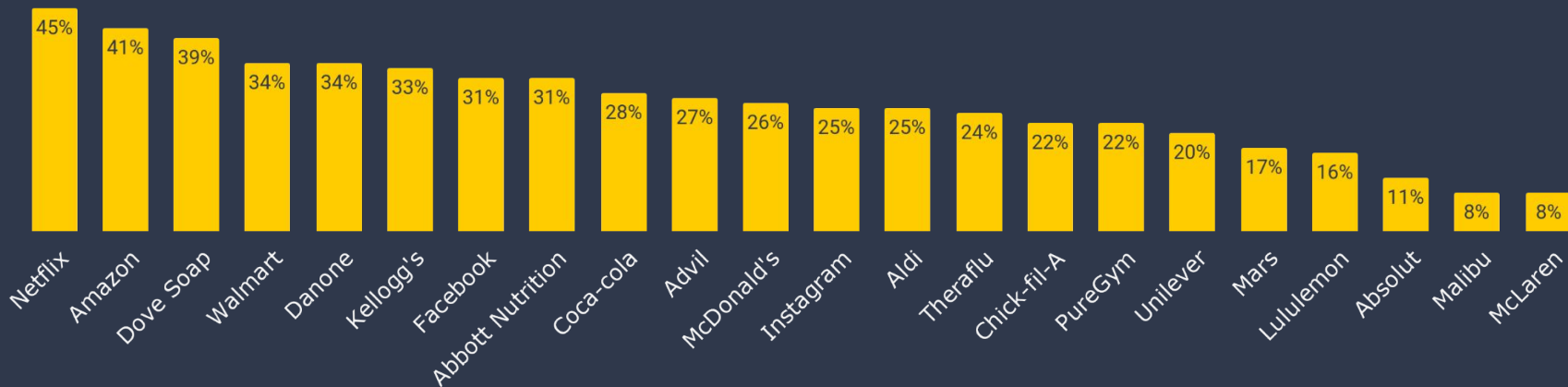
Millennials: I will pay more for products that improve how I feel

UK: 57%; US: 70%; MX: 46%



The brands that make people feel good

Brands that help you 'feel good' in your life



What this all means



Three implications from this work

01

Focus on the Body Up felt experience

Felt experience testimony becomes key for brands. Claims should be about what is happening in the body (and why) rather than just on the end result. The depth of the explanation brings authority and trust.

02

Choose Your Signals

Brands have a choice to make about how they play in wellness today: race the (devaluing) object and ritual economy, own the (harder, defensible) outcomes economy, or claim quiet, undemonstrated wellness as the next elite signal

03

Embrace The New Rest Occasions

Regardless of your category, find ways to insert yourself into the recovery side of people's lives. This is about helping with a rich emotional territory: the deliberate moments of winding down.



Thank you

For more information contact:
sophie@bammglobal.com



"The list is endless. Everyone keeps saying, 'You should journal. Get your thoughts out.' And I'm like, 'Oh gosh, it's just another thing to do.'"

Sian, Project Manager, UK, 41

