BCG | VOGUE

REDEFINING VALUE IN A MULTIGENERATIONAL WORLD

contents

Every generation is rewriting what value means. For the youngest, shopping is a form of play and connection; for older consumers, it remains rooted in trust and heritage. Food has become a marker of identity as much as health, while longevity is no longer an end-of-life concern but a daily practice across all ages.

These shifts reveal that value today is multifaceted - shaped by many generations and rooted in shared human experience. Younger audiences push boundaries with digital fluency and curiosity, while older ones bring stability, resilience, and perspective. Together, they shape a culture where creativity, wellness, and identity intersect.

People welcome innovation yet seek authenticity; they chase the new while finding comfort in the familiar. For brands, this is not a challenge to solve, but an invitation to design with nuance, where discovery and reassurance, playfulness and responsibility can coexist.

At Vogue Polska, we see this as a cultural opportunity. Generational diversity expands how we tell stories, build communities, and imagine the future. Today's true relevance lies in honoring tradition while embracing change and in showing that fashion can be both timeless and transformative.
This is the essence of modern value and the luxury of our time.

KASIA JORDAN

Chairwoman Vogue Polska

In today's world, value is no longer defined by a single metric. It is shaped by the lived experience of different generations - their habits, expectations, and evolving definitions of what matters most. As the Polish population becomes increasingly age-diverse, brands face a growing imperative to deliver relevance across a multigenerational landscape.

From retail and health to food and lifestyle, every aspect of consumption is being reimagined. Gen Z and Gen Alpha approach fashion retail as a social experience - expressive, immersive, and shaped by digital discovery. In contrast, Boomers and Gen X prioritize trust, functionality, and familiarity. Younger consumers treat health as a lifestyle infrastructure, blending mindfulness, diagnostics, and tech fluency, while older consumers value clarity, reliability, and cognitive sharpness. And when it comes to food, emerging generations are not just consuming - they're curating. They demand ethical sourcing, local origin, and alignment with personal values, while their parents still emphasize tradition and price.

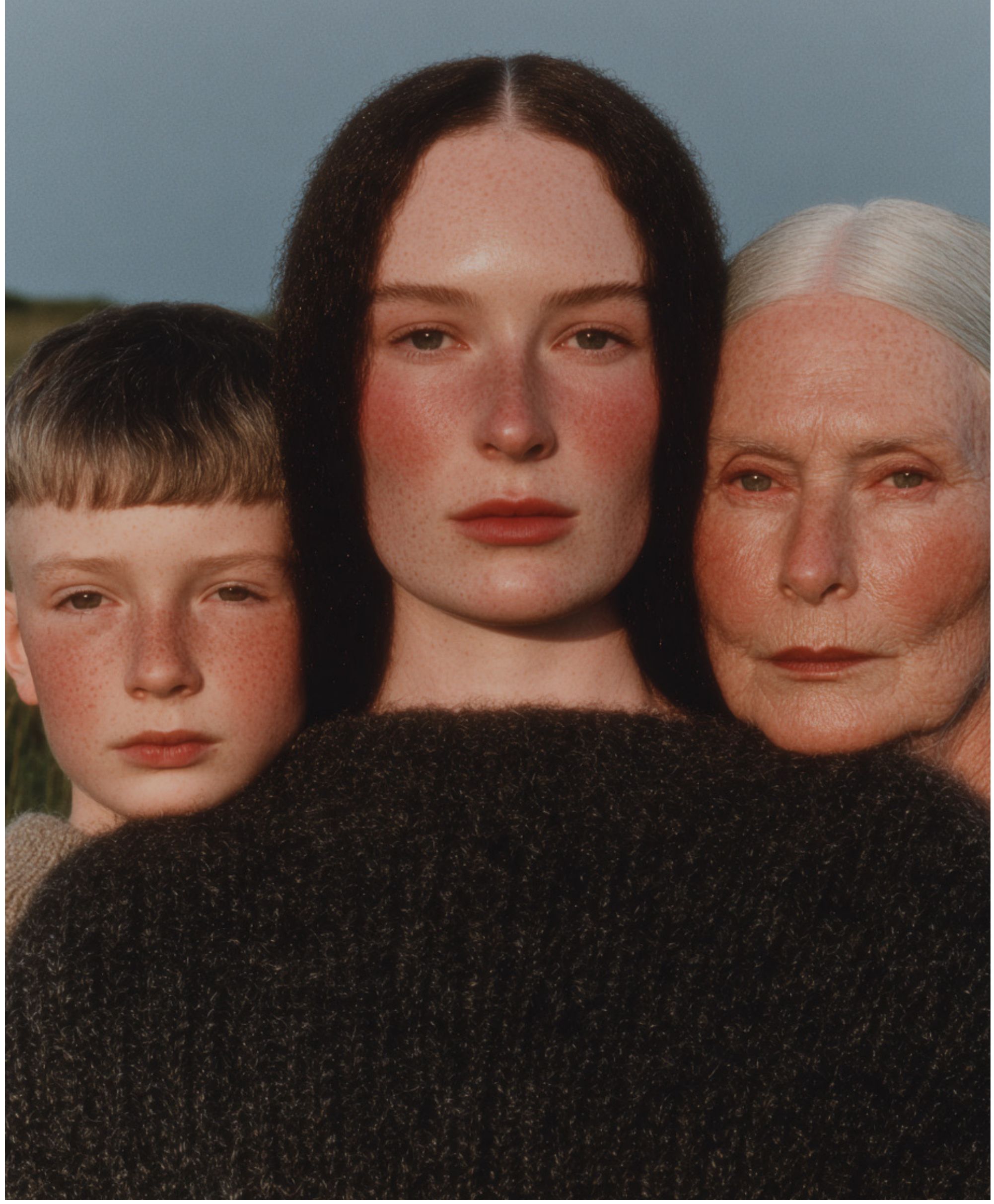
Companies must redefine value as multigenerational, multidimensional, and deeply human. This redefinition is a transformation in how value is perceived, pursued, and personalized. Brands can no longer design with only the average customer in mind. Success depends on the ability to serve both ends of the spectrum, creating environments that are at once familiar and fresh, digital and human, aspirational and accessible.

Crucially, with generational shifts come paradoxes. Technology is embraced, yet human connection is expected. Novelty is sought, yet trust is non-negotiable. Navigating these contradictions will be the true test of leadership. Brands must find inspiration in the challenge of generational diversity, treating it as a creative brief and roadmap to success.

OKTAWIAN ZAJĄC

Managing Director & Senior Partner, Head of BCG Warsaw Office at Boston Consulting Group (BCG)

EXECUTIVE SUMMARY



Generational diversity is not a challenge to be managed but a roadmap to the future. With Generation Alpha now entering the stage, all actors need to adjust.

In fashion, younger consumers treat shopping as a form of entertainment and social connection. For Gen Z, peers and influencers matter more than any advertising channel: 41% report that a friend's recommendation strongly influences their purchase decisions, while for Boomers this influence is negligible[1]. Nearly half of Gen Z indulge in a "treat purchase" at least once a month, compared with 43% of Millennials and only 34% of Gen X[2]. Their shopping is impulsive, community-driven, and trend-led, whereas older generations value clarity, independence, and brand heritage. Personalization accelerates this divide: retailers that master it grow 10 p.p. faster than peers that lag behind in this area[3]. Gen Z is also redefining luxury in fashion, switching to second-hand as a more affordable channel to buy luxurious apparel. 31% of Gen Zers admit to having purchased and 44% resold second-hand items[4].

Food is no longer just about sustenance but about identity, creativity, and preventive health. Nearly 80% of Poles report controlling their diet, yet the meaning differs across cohorts: for 90% of Boomers, control equates to discipline and restraint, while for 70% of Gen Alpha it is a way to signal their individuality and lifestyle choices. Functional food and beverages are the new frontier: the global market for functional drinks is forecast to reach

$250 billion by 2030[5], with Gen Z driving adoption. In the UK, one retailer's sales of health drinks surged 54% year on year, with matcha alone growing 67% between 2023 and 2024[6]. Globally, the matcha market is expected to surpass $7.4 billion by 2030[7]. This shift often happens at the expense of alcohol, which faces declining consumption. In Poland, alcohol-free alternatives are becoming increasingly popular. 40% of consumers, who chose alcohol alternatives select non-alcoholic beer, while one in ten Gen Z and Millennials opt for kombucha or CBD-infused beverages, reframing social rituals around wellness.

Shift towards healthier, functional foods illustrates a strong trend in all social groups: focus on health and longevity. No longer confined to end-of-life planning, longevity is treated by younger generations as a daily pursuit of vitality. Almost half of Gen Z book regular preventive check-ups; more than a quarter undergo fitness assessments, and nearly one in ten have tried genetic testing. Over 80% use digital health tools, with half engaging weekly and one in five daily. The wellness and longevity segment is emerging as the core of luxury consumption, growing 8% last year and projected to accelerate to 10% growth in the next 18 months[8]. For younger consumers, wearables, supplements, and mindfulness are not experiments but lifestyle routines. For older consumers, health remains centered on independence, cognitive clarity, and trusted care. Mental health, however, has become a universal priority: Gen Z normalizes mindfulness and therapy, Millennials emphasize sleep and emotional balance, while Boomers prioritize sharpness and mental acuity.

GENERATION ALPHA: THE NEXT CONSUMERS

Although still very young, Generation Alpha is already shaping emerging patterns of consumption. In retail, they treat stores as playgrounds: a quarter of those aged 10–15 visit shops purely for fun, and view shopping as a social activity. Their approach to food also signals a shift: 70% define diet control as self-expression - for instance, by opting out of meat or choosing ecological products - contrasting sharply with Boomers who view it as restraint. Even in health, their early adoption is striking. Despite their age, 42% already use smartwatches to track well-being, and 30% engage with digital health tools weekly. These behaviors suggest that as Gen Alpha gains financial independence, they will amplify trends of social shopping, functional food, and tech-enabled health.

Generational shifts are not only about the young. Mature consumers - often overlooked - are proving resilient and influential. While they spend less frequently, they spend more per purchase[9], are less financially anxious (only 25% report regular concerns compared with nearly 50% of younger consumers), and often inspire younger groups: in fashion, 36% of youth say they are influenced by older adults, but only 16% of older consumers report the same about younger generations[10]. Older cohorts are also increasing their digital presence, with “granfluencers” such as Grandma Tian, with 36 million followers, and Uncle Mona, with 17 million[11], redefining cultural authority.

Generational diversity is redefining value across all consumer segments. Implications for businesses are profound. Success will come from designing around identity, needs, and life stage. In this complex environment brands must learn to reconcile paradoxes: novelty with trust, digital experiences with physical touchpoints, personalization with accessibility. The emergence of GenAI requires blending physical and digital touchpoints seamlessly, with 52% of Gen Z already using or planning to use it in their shopping journeys[12]. Above all, it demands building loyalty through personalization and trust.

ABOUT THE REPORT

In this report, we examine generational differences drawing on both international research and a proprietary survey conducted with over 1,000 Polish respondents representing all major generational cohorts. For the purposes of this report, generational groups are defined according to age brackets as follows:

- **GENERATION ALPHA:** 10–15 years
- **GENERATION Z**: 16–30 years
- **GENERATION Y / MILLENNIALS:** 31–44 years
- **GENERATION X:** 45–60 years
- **BABY BOOMERS:** 61–79 years

1

ONE SPACE, MANY JOURNEYS:

DESIGNING FASHION RETAIL **FOR EVERY GENERATION**

DESIGNING A MULTIGENERATIONAL **STORE EXPERIENCE**

As the consumer landscape rapidly evolves, generational differences in shopping behavior have become increasingly pronounced. To stay relevant and profitable, fashion brands must consciously address varying multigenerational needs. While older consumers tend to be more cautious with their spending, Gen Z consumers allocate a significantly higher share of their budget to categories such as fashion and beauty products.

BCG analysis run on the US market shows that nearly 50% of Gen Z reported splurging on a treat or desired item more than once a month, compared with 43% of Millennials and just 34% of Gen X.[13] We ran a survey among representatives of all generations in Poland exploring their shopping preferences, which confirms both the generational contrasts and shared priorities that shape today's retail landscape. If they persist, these shopping habits are poised to become a key growth engine for the fashion retail industry as Gen Z and Gen Alpha join the workforce and gain spending power.

STORE VISITS AS SOCIAL **OUTINGS AND ENTERTAINMENT**

While store visits are mainly for purchasing apparel across all generations, these visits are also entertainment for Gen Alpha and Gen Z. BCG analysis shows 25% of those ages 10-15 visit stores just for fun and treat it as a social outing. Similarly, 30% of those ages 16-30 also reported visiting for fun, with 36% treating it as a social outing. This percentage fell below 20% for those in older groups.

Reasons for visiting a physical store

Age	*Entertainment or leisure*	*Discover new products or trends*	*Purchase specific items*	*Return or exchange*	*Social outing*
10-15	23%	28%	60%	9%	24%
16-30	30%	28%	48%	18%	36%
31-44	18%	28%	59%	9%	17%
45-60	20%	22%	71%	10%	12%
61-79	12%	21%	80%	2%	10%

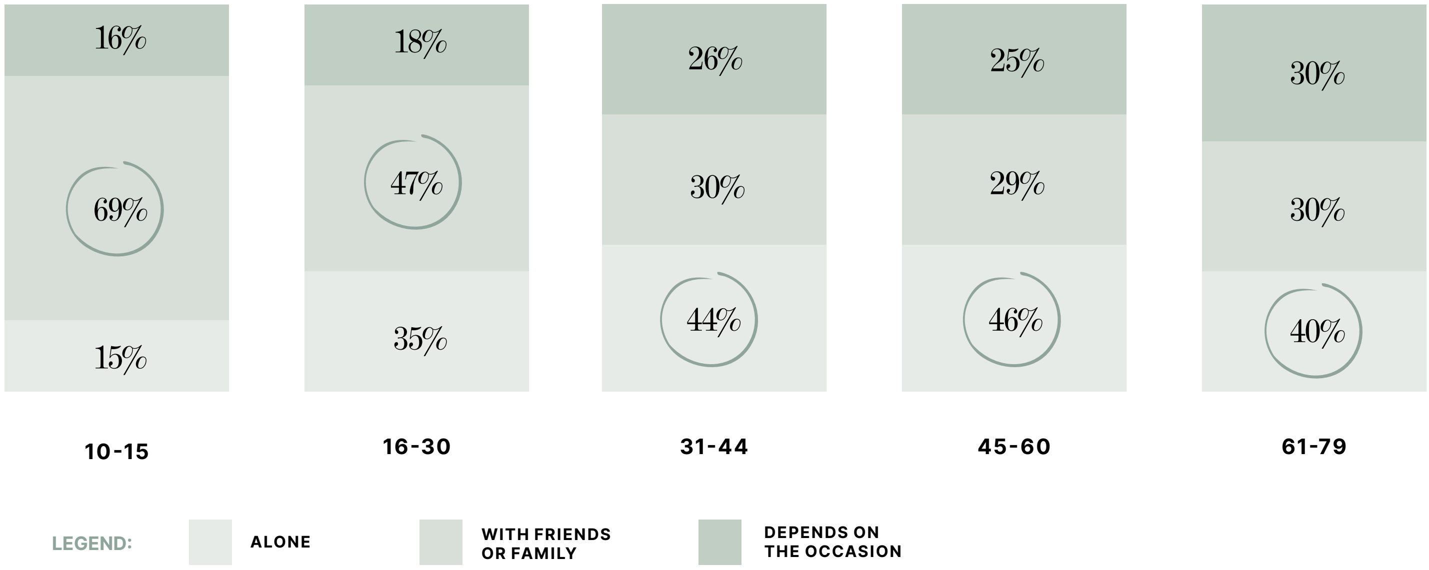
A shift in motivation translates into a shift in behavior. Younger generations most often shop with friends and family, while Millennials and older generations prefer shopping alone. Younger consumers are also more likely to base their fashion purchases on recommendations from people they trust, highlighting the role of trusted relationships in shaping shopping decisions. Significantly, 41% of Gen Z say a friend's recommendation strongly increases their likelihood of purchase. In comparison, a friend's recommendation held almost no bearing for Boomers.[14]

CASE STUDY: RESERVED

STYLING SESSION WITH VOGUE ITALIA

As part of its strategy to build brand community and presence in the Italian market, the brand Reserved organized an exclusive, invitation-only "Styling Session with Vogue Italia" at the flagship Reserved store in Milan during fashion week. The collaboration targeted young, trend-conscious customers interested in fashion and culture, while the event's timing significantly increased the visibility of the brand among both local fashion communities and international audience. Guests had the opportunity to participate in a live styling session led by a Vogue stylist, transforming the shopping experience into a unique cultural moment. The event's exclusive and interactive format allowed Reserved to successfully reach new target groups and encouraged offline engagement with a younger, more demanding audience. This initiative exemplifies a modern approach to the retail experience, merging fashion, media, and culture within the store environment.

Preferred shopping company by age group



***NOTE:** THE HIGH PERCENTAGE (69%) OF RESPONDENTS AGES 10-15 WHO PREFER SHOPPING WITH FRIENDS AND FAMILY MAY BE INFLUENCED BY LEGAL AND PRACTICAL LIMITATIONS.

THE POWER OF **SOCIAL MEDIA PRESENCE**

Social media marketing serves as a powerful channel for delivering trusted recommendations, with 40% of teens and 46% of those ages 16-30 reporting store visits after discovering them on social media. The goal is no longer just about visibility but about creating content that converts scrolls into steps.

When it comes to attracting more store visitors with social media, influencer content is making a marked impact. According to BCG research, precision influencer marketing - tailoring creators to specific consumer segments - can be up to six times more efficient than traditional campaigns and boost sales by up to 20% in the first month. Crucially, it's not about the size of the audience, but about the overall fit of both relevance and credibility that the influencer holds within the given target group.[15] For younger audiences, influencers extend beyond entertainers into the realm of trusted guides who aid discovery and decision-making. Evolving consumer behavior speaks to a broader generational redefinition of the role of retail.

PERSONALIZING **THE SHOPPING EXPERIENCE**

Creating a unique experience and fostering participation increasingly hinges on personalization. L'Oreal is successfully leveraging personalization with GenAI-powered assistants that help customers design looks for specific occasions and instantly order recommended products.[16] Such approaches deliver tangible results: brands scoring high on personalization saw the greatest customer satisfaction and generated 30% higher conversion.[17]

"At Reserved, we've seen that influencer marketing and authentic UGC or peer content on platforms like Instagram and TikTok are especially effective in driving store visits. Short-form videos and behind-the-scenes content tend to resonate most with Gen Z and younger generations, while curated outfit posts and styling tips perform better with Millennials. For older audiences, Facebook posts and longer-form videos with product explanations still hold strong engagement."

– AGATA SAWICKA,
BRAND COMMUNICATION DIRECTOR, RESERVED.

Fashion retailers operating in e-commerce must adjust to these changing preferences. Technology - particularly AI - plays a critical role in influencing what consumers buy. With the rise of generative models and conversational search, shoppers are turning to LLM-powered chats to explore, compare, and select products. Already, 52% of Gen Z and 46% of Millennial shoppers have used or plan to use generative AI as part of their shopping experience. Even older generations are joining in: 34% of Gen X and 24% of Boomers report the same. Among those who have tried GenAI tools, 80% describe the experience as helpful, showing its growing influence on purchasing decisions.[18]

Generative AI is also reshaping how consumers buy, through the emergence of new tools. OpenAI, together with Etsy, has recently piloted an instant checkout feature in the US, enabling users to purchase products directly within ChatGPT. The pilot supports single-item purchases for now, but is expected to expand to multi-item carts, more merchants, and additional geographies. The solution is powered by the Agentic Commerce Protocol built with Stripe. The protocol has been open-sourced to enable more merchants to integrate with ChatGPT's transactional layer. As Agentic AI advances, it will further reshape the industry and consumer shopping journeys.[19]

Enabling real-time personalization, adaptive content, and tailored recommendations determines whether the user interacts with a brand and ultimately makes a purchase. Regardless of format-online or in-store-fashion environments must now deliver more than just inventory.

This strategy is being effectively implemented by companies like LPP, a leading Polish fashion retailer operating brands like Reserved and Sinsay. As Przemysław Mitraszewski, External Relations Director, highlights: *"At LPP, we design stores to be intuitive and comfortable for older customers, while offering trend-driven, inspiring spaces that resonate with younger audiences. Creative window displays and a clear store layout enhance the shopping experience and drive sales across generations. The mobile app plays a key role by simplifying purchases, providing access to promotions, e-receipts, and purchase history, and encouraging seamless movement between online and offline channels. Our loyalty program, enhanced with gamified elements like quizzes, store check-ins, and photo reviews, builds emotional engagement - especially among younger users - making shopping a lasting, interactive experience. Users combining the traditional shopping experience with online tools shop up to five times more often and are a key driver of our omnichannel strategy."*

MAXIMIZING TRENDS WHILE MAINTAINING IDENTITY

Balancing the conflicting interests of different generations is becoming a critical success factor for fashion retailers. Older customers, such as Gen X, value brand heritage and trusted quality, as is reflected in Gen X leading all generations in luxury goods spending per purchase - with an index of 1.1 compared to 0.9 for Gen Z - showing a greater willingness to pay a premium for long-lasting, trusted labels.[20] In contrast, younger consumers expect constant novelty. Gen Z also tends to connect more strongly with retail spaces than with brands themselves, increasingly valuing brands that create community and invite participation beyond the product alone.[21] A brand excelling in building community around shared values is Patagonia, which has centered its identity around eco-friendly principles. By leveraging authentic, user-generated content, such as stories from environmental activists and Q&As, as well as releasing podcasts and short films, the brand fosters a sense of shared purpose that resonates with over five million Instagram followers.[22]

To ensure growth and longevity, brands need to address and embrace these conflicting multigenerational needs. As Grażyna Piotrowska-Oliwa notes, retailers can employ numerous tactics to meet the demand for constant change while maintaining profitability. For younger generations, these could include launching short-lived "meteor" brands or spin-off collections. A great example of merging the need for novelty with timeless minimalism is the concept of capsule wardrobes that resonate across generations.

CONSIDERING **COMFORT OVER COST**

While 58% of shoppers ages 61-79 and 52% of those ages 31-44 choose online shopping primarily to compare prices, younger consumers appear to take a different approach. Approximately half of those aged 16-30 prioritize better product selection and say they prefer to avoid crowded spaces, suggesting a growing preference for ease and comfort over scoring the lowest price. BCG's Gen Z research notes that younger consumers increasingly care more about how they experience a brand than getting a great deal.[23] That said, the relationship between Gen Z consumers and prices is complicated. They often have lower disposable incomes, tend to buy apparel on promotion more often than other groups (54% vs 48%), but at the same time 29% claim they would have made a purchase without a discount as opposed to just 13% of representatives of other generations.[24] Recent BCG consumer sentiment research shows also that consumer pessimism is rising across Europe and apparel is one of the categories expected to decrease the most (20 p.p.) in terms of net spending change in the next 6 months. While comfort and convenience are important for younger consumers, price is still a key purchase driver.[25]

Reasons for choosing online shopping by age groups

Age	*Lack of time*	*Habit*	*Price comparison*	*Easier returns*	*Better selection*	*Avoiding crowds*	*Other*
10-15	26%	8%	48%	12%	37%	31%	4%
16-30	38%	17%	45%	24%	49%	50%	0%
31-44	35%	10%	52%	27%	45%	42%	1%
45-60	37%	8%	49%	14%	39%	33%	3%
61-79	19%	9%	58%	11%	42%	41%	5%

key insights *for businesses*

- **Elevate the social element of shopping.** Younger consumers treat shopping as a shared activity. Stores must encourage interaction, not just transactions. Introduce seating, mirrors, and selfie-friendly spaces to create social zones without costly redesigns. Events like styling sessions can further boost engagement.

- **Connect the digital journey with a physical presence.** Use social media presence to drive in-store action. Partner with micro-influencers to host pop-up takeovers or styling events tied to digital campaigns.

- **Novelty drives visits.** Go beyond rotating collections - think micro-drops, surprise product reveals, collaborations with creators, or limited editions. Create a sense of urgency and discovery that gives shoppers a reason to come back often.

- **Prioritize comfort and clarity.** Cleanliness and clear store layout consistently rank among the top priorities across generations. Design stores to be calm, intuitive, and low stimulation, with clear aisles, soft lighting, and visible navigation signals. Consider offering mobile self-checkout, where operationally viable, to reduce waiting time and eliminate crowding in key areas.

2

Diet and food culture is changing faster than ever. Discipline is no longer the golden standard; what we eat is now also a reflection of who we are and how we want to live. For younger generations, food is an expression of identity and creativity: it's how they connect with others and even push back against traditional health rules. For older generations, food is a way to safeguard wellness and influence family health. What's on our plates is no longer just about age or preference - it's a reflection of life stages, priorities, and the stories we want to share about ourselves.

FUTURE OF FOOD:

THE GENERATIONAL SHIFT **RESHAPING WHAT WE EAT**

SHIFTING RELATIONSHIPS WITH FOOD AND DIET

In Poland, close to 80% of consumers say they control their diet, a consistently high figure across age groups. The difference between generations is moderate - around 70% of Gen Alpha compared with 90% of Boomers. But, while the numbers are broadly aligned, what people mean by "control" is not. For older cohorts, control signals discipline and restraint, while for younger ones it increasingly reflects identity and self-expression. As BCG research in China highlights, Gen Z is not traditionally health-obsessed but instead "punk health-conscious" - seeking emotional connection, creativity, and clear statement of personal values (e.g., environmental consciousness, health prioritization) through food more than conventional markers of health.[26]

Varying motivations underline this split. From midlife onwards, wellness is the dominant driver for 66% of Gen X and 78% of Boomers. By contrast, Gen Z leans into self-design, with 32% citing weight loss as their priority versus the 25% average, and 14% emphasizing muscle gain, twice the cross-generational norm. What looks fragmented is in fact a continuum: food is being used to shape not only health outcomes, but also self-image.

ANNA LEWANDOWSKA,
nutrition expert and CEO of Foods by Ann, shares powerful insights into the shifting food culture.

"Food is joy, but joy can also be healthy. The challenge - and opportunity - is to connect pleasure with purpose. I can clearly see how the Polish market is maturing. More people are looking for products with a clean composition and transparent origin. This is no longer a trend; it is everyday life."

80%

OF POLISH CONSUMERS SAY **THEY CONTROL THEIR DIET.**

Importantly, life stages act as turning points in how people approach food. Parenthood is a moment when abstract notions of “diet control” translate into stricter scrutiny of product origin, nutritional density, and additives. What begins as self-expression in youth often evolves into responsibility in adulthood. This phenomenon illustrates how motivations are less about generational divides than about where people are in their lives.

For brands, the implications are clear: food is no longer simply fuel. It is becoming an expressive medium where consumers - especially young generations - expect products to align with their identity goals. It is also a responsibility trigger, with life events like parenthood or health challenges reshaping how households choose, prepare, and consume food. To succeed, companies must reimagine health as a lifestyle accessory as much as a nutritional necessity.

FUNCTION IS THE NEW FLAVOR

Health no longer stops at “avoiding the bad.” Increasingly, consumers are asking what food can actively *do* for them. Functional products - those tied to specific benefits like digestion, performance improvement, or hormonal balance - are becoming mainstream. BCG research

$250B

BCG RESEARCH SHOWS THAT THE FUNCTIONAL BEVERAGE MARKET IS SET TO REACH **$250 BILLION BY 2030**, PROVING THAT HEALTHY FOOD IS A TREND WORTH TAPPING INTO.

shows this is not a niche wellness segment but a global growth engine, with the functional beverage market projected to reach $250 billion by 2030.[27]

One of the clearest examples of this evolution is the rise of prebiotic sodas in recent years - fiber-rich, lower in sugar, and positioned around digestive health. For companies that spotted the trend early, it translated into booming sales: Olipop, founded in 2018, surpassed $400 million in revenue by 2024, growing more than 200% in just four years. In March 2025, PepsiCo announced a $1.95 billion acquisition of rival Poppi, while Coca-Cola is entering the space with its own prebiotic brand, Simply Pop.[28]

Anna Lewandowska reflects on how proper food selection can impact athletic performance: *"Today, sport is not only a trend, but also a motivation to take care of yourself. For a long time, this has been shown by the trend of high protein: physically active people are more likely to look for protein, regeneration, and energy. Food ceases to be accidental; it is to support a lifestyle, give effects, be part of a plan."*

Younger consumers are at the forefront of the shift toward functional change. For them, food is not simply sustenance but a tool for optimization. They are also redefining social rituals: where previous generations framed abstaining from alcohol as the healthier choice, Gen Z and Millennials take it further. They replace alcohol with alternatives that deliver added value - kombucha for the gut, CBD drinks for calm, and herbal tonics for focus.

"I see a clear increase in interest in functional products - more people are looking for food that, in addition to taste, supports specific needs of the body, such as digestion and immunity," notes Anna Lewandowska. *"There is also a growing awareness of the quality of ingredients and short, transparent labels. Food is not only a pleasure, but a conscious choice, and it reflects our ideals."*

For brands, this means function must be more than a claim on a label. It needs to be contextualized - linked to life moments, sports, or daily routines that consumers recognize. Functional foods and drinks are not just competing with traditional categories, they are rewriting the expectations of what "healthy" means. The winners will be those that move beyond avoidance and deliver products that consumers actively seek out as enablers of performance, focus, and well-being.

BCG & WHO *research confirms*

THAT FOOD CHOICES ARE INCREASINGLY FRAMED AS PROACTIVE HEALTH MAINTENANCE RATHER THAN REACTIVE CARE.

FOOD IS WHERE **PREVENTIVE HEALTH BEGINS**

For many consumers, the supermarket shelf has become the doctor's waiting room. Among Boomers, 45% say the ingredient list is their second most important purchase driver, nearly double the 25% for Gen Alpha. This shift reflects a broader "food as medicine" mindset, where products are judged as much for their long-term preventive role as for their taste.

Anna Lewandowska sees the kitchen as the true arena of long-term wellness: *"Your kitchen is where long-term health starts - it's every day, not just during a medical check-up. It's no coincidence that in Foods by Ann we never use white sugar - we show that natural sweetness can come from fruit or other valuable ingredients."*

"We also try to educate consumers on the importance of understanding labels (...). More people are consciously approaching what goes on their plate (and into the glass!) and they are increasingly understanding how the composition of products, calories, and their impact on the body translate into our health and well-being."

> *"Your kitchen is where long-term health starts - it's every day, not just during a medical check-up"*
>
> **ANNA LEWANDOWSKA**

In 2024, the food and beverage market value growth fell to 2.1% from a 5% average the previous three years, below the 2.9% rate of inflation. BCG research highlights three processed-food trends as contributors: increasing consumer health awareness, rising regulatory pressure, and expanding use of GLP-1s (medications that aid weight loss and diabetes control). Interestingly, greater health awareness does not mean giving up on processed food completely, but rather switching to alternatives from smaller manufacturers. Between 2020 and 2024, large manufacturers gave up 7.6% of US market share in the cereal category to smaller manufacturers and 4.4% in the pizza category. The surge in GLP-1 drugs for weight loss and diabetes results not only in lower consumption but also altered taste - research shows a 12% drop in household spending on chips and other savory snacks and a 10% decline in sweet baked goods six months after at least one household member starts on GLP-1s. While ultra-processed products are here to stay, CPG companies need to adjust to these trends to remain competitive.[29]

Ingredient transparency is no longer a hygiene factor; it is a driver of trust and purchase. Winning players will treat their back labels not as compliance but as communication - educating, reassuring, and signalling credibility in a space where consumers are scrutinizing every line. As expectations rise, technology is becoming a valuable enabler: one CPG company built an AI tool that generates optimal starting formulations for new products, doubling the pool of candidate recipes and cutting overall formulation time by 30–50%.[30] Anna Lewandowska advises that brands should focus on transparency and education. *"It's not just about promoting "healthy" ingredients, it's about helping the customer make informed choices. Not everything needs to be demonized - it is important to know what you eat."*

CONSUMERS ARE REWIRING THE APPROACH **TO ALCOHOLIC BEVERAGES**

Alcohol no longer defines social life the way it once did. In Poland, over 10% of consumers say they never drink alcohol and 23% drink only a few times per year, driven by health (61%), mental clarity (40%), and cost (26%). This isn't abstinence for its own sake - it's a recalibration of what socializing means.

Globally we do observe similar trends, often driven by younger consumers opting out of alcohol. In the US, alcoholic beverages e-commerce platform Drizly notes that 23% of Gen Z and 24% of millennial respondents reported drinking non-alcoholic beer, wine or spirits often, while only 6% of Gen X and 1% of Boomers said the same.[31]

New repertoires are filling the gap. Non-alcoholic beer is now the preferred choice by 40% of Poles, while 30% prefer herbal drinks; up to 10% of Gen Z and Millennials opt for kombucha or CBD beverages. For younger cohorts, there is clear appeal for drinks that deliver added wellness value.

Anna Lewandowska captures the shift directly: *"Alcohol? It is just empty calories that don't support a healthy lifestyle. More is also being said about its negative impact on the nervous system or the roar of addictions (...) Cognitive health is becoming an important topic."*

For brands, this means that beverages are no longer just about taste or buzz. The real growth lies in positioning drinks as social well-being enhancers - products that deliver health benefits without compromising ritual or enjoyment. The companies that succeed will be those that create drinks consumers want to be seen holding, because they say something about both their lifestyle and their values.

Data from Poland:

10%

NEVER DRINK ALCOHOL

>20%

DRINK ONLY A FEW TIMES PER YEAR

REASONS:

61%
HEALTH

40%
MENTAL CLARITY

26%
COST

"Technology can help, but it can't replace intuition and tradition. The future of food will be a balance - data in one hand, values in the other."

ANNA LEWANDOWSKA

TECHNOLOGY MUST SERVE TRUST, NOT REPLACE IT

Despite the hype around apps and wearables, Polish consumers still place more weight on what they can see with their own eyes. Health and ingredient transparency are the leading priorities for 78% of Boomers and 68% of Millennials. Similar trends are seen globally, with the Yuka app (55 million users across 12 countries) as a great example of technology in service of transparency. Yuka provides product ratings based on health impact. According to a study of the app's impact, 94% of United States Yuka users said they had put back products that received a red (bad) rating, and 92% are buying fewer ultra-processed food products altogether.[32] The lesson is simple: technology in food must act as an enabler of trust, not a substitute for it.

Generational patterns suggest where the market is heading. A significant 80% of Gen Z already use technology to manage their health, with half engaging weekly and 20% daily. Even 30% of Gen Alpha - despite their age - are using digital health tools weekly, a figure likely to surpass Gen Z as they mature. This evolution shows a clear adoption curve and sets the stage for a new food culture: while most adults today want reassurance on labels, the next generation will expect food to integrate seamlessly with tech-enabled health routines. As Anna Lewandowska notes, "*Technology can help, but it can't replace intuition and tradition. The future of food will be a balance - data in one hand, values in the other.*" The key drivers of the generational shift in food industry paint a picture of food as both fuel and lifestyle - something that brings joy while also shaping health, identity, and community.

key insights *for businesses*

- **Adapt to generational shifts.** Nearly 80% of Poles control their diet, but Boomers define it as restraint while Gen Alpha see it as self--expression. Brands must adapt messaging to both age but also life stage (e.g., parenthood).
- **Embrace function as the new flavor.** The functional beverage market is set to reach $250 billion by 2030, with new products being expected to deliver clear, everyday benefits like energy, focus, or calm.
- **Preventive health and ingredients go hand in hand.** Almost half of Boomers rank ingredient lists as a top purchase driver, meaning that transparency and education on labels are key to winning this consumer group's trust.
- **Perception toward alcohol is radically evolving.** In Poland, over 20% of consumers drink alcohol only a few times per year, and increasing number of consumers opts for non-alcoholic alternatives, among which non--alcoholic beer is most popular

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For decades, longevity was a clinical term, tied to life expectancy curves and end-of-life care. It evoked images of retirement planning, age-related decline, and institutionalized care. But today, longevity is undergoing a profound rebranding, led not by the elderly but by the young. Gen Z, Millennials, and even Gen Alpha are reinterpreting what it means to "live long and well." For these cohorts, longevity is not something to prepare for later - it is something to optimize for daily. It is a lifestyle operating system: proactive, data-driven, emotionally attuned, and increasingly tech-enabled.

LONGEVITY:

THE NEW **HEALTH VALUE SYSTEM**

How generations define living a long and healthy life:

WHILE ALL GENERATIONS WANT TO STAY PHYSICALLY ACTIVE, THEIR DEFINITIONS OF WHAT IT MEANS TO LIVE A HEALTHY LIFE VARY

GEN ALPHA:
AVOIDING ILLNESS

GEN Z:
AVOIDING ILLNESS, BEING HAPPY

MILLENNIALS:
AVOIDING ILLNESS, BEING HAPPY, BEING INDEPENDENT IN OLD AGE

GEN X AND BOOMERS:
FEELING MENTALLY SHARP, BEING INDEPENDENT IN OLD AGE

Yet, even as human lifespan extends, the gap between how long we live and how long we stay healthy is widening. According to BCG research, people now spend nearly a decade or more of their later years battling chronic illnesses, disabilities, and declining quality of life.[33] This healthspan-lifespan gap is not just a public health challenge but a structural shift that will impact every sector of the economy.

The commercial opportunity is vast. The WHO projects the global population over age 60 will double by 2050. But younger generations are already reshaping the health market from the ground up, investing in hormone panels, mindfulness apps, functional supplements, and diagnostics in their 20s and 30s. Research also shows that we don’t age at a constant rate. Instead, there are measurable “jumps” in aging - most notably around age 44 and age 60 - when individuals naturally reassess their health priorities.[34]

BCG’s global research shows that life-stage transitions often act as turning points for health behavior, triggering more deliberate choices about prevention, wellness, and lifestyle.[35] These moments of truth are prime opportunities for brands, providers, and platforms to engage consumers with relevant, longevity-focused products and services. Health is no longer episodic or reactive; it is habitual and expressive. In this new context, longevity becomes a form of identity. And as consumers across age groups align health with purpose, brands are being offered the opportunity to play a new role as partners in well-being.

GENERATIONAL INSIGHTS: HOW HEALTH IS DEFINED AND DESIGNED

For younger generations, preventive care no longer begins and ends with annual check-ups. It’s a continuum of self-monitoring and proactive decision-making. Nearly 60% of Gen Z respondents say preventive care is a high personal priority, and almost half report booking preventive medical appointments unconnected to illness. Moreover, 13% have undergone hormone panels, 27% fitness assessments, and a growing number engage in genetic testing - indicating that health optimization, not symptom treatment, is the driver.

Indeed, as BCG's global health care research highlights, prevention today spans far beyond the clinic. Smart implants and wearables such as Oura, WHOOP, Garmin, Fitbit and Apple Watch can track cardiac activity, blood sugar, and sleep in real time, enabling earlier intervention and giving consumers continuous insights into their health.[36]

This reflects a broader shift in mindset: prevention is not just about avoiding illness, but about feeling more energized, performing better, and maintaining long-term personal agency. This is particularly important in the context of WHO projections of extending lifespan. As BCG notes, the goal is not only to live longer but to extend the years spent in good health.[37] For brands, the demand for convenience, insight, and control in health journeys will only intensify.

48% of Gen Z

DECLARE REGULAR PREVENTIVE MEDICAL APPOINTMENTS

GEN Z PAVES THE WAY TO ALTERNATIVE WELLNESS CHECKS:

- **13%** declare using hormonal or metabolic panels in last 12 months
- **27%** fitness assessment
- **8%** genetic testing

CASE STUDY: NIKALAB

FROM SUPPLEMENT BRAND TO HEALTH PARTNER

As the boundaries between wellness, medicine, and lifestyle continue to blur, Nikalab is redefining the role of a supplement company. Rather than acting solely as a manufacturer of over-the-counter products, the Polish brand positions itself as a long-term partner in preventive health, supporting its customers with consistency, trust, and daily relevance.

One of the company's core innovations is its subscription model, which reframes supplementation not as an occasional decision, but as a sustained health routine.

"The decision to introduce subscriptions was a natural next step, as we wanted to make it easier for our customers to take care of their health. Most of the supplements we offer are meant for daily use - a consistent part of a healthy lifestyle. Regularity matters, but daily life can be demanding. Subscription brings convenience, continuity, and peace of mind. It supports consistency without adding burden."

- **KATARZYNA GODLEWSKA**, FOUNDER, NIKALAB

Nikalab's consistent presence in its customers' lives enables the brand to evolve with consumer needs, blending convenience with personalization. The approach resonates most strongly with Millennials and Gen X, who together represent over 70% of their customer base, as these generations are seeking routines they can rely on and solutions that simplify self-care.

Nikalab holds a deep understanding of how health fits into people's everyday lives. By being present in real-world spaces, the brand meets consumers where their lives happen.

"Our events are moments of real connection with clients - they give us the opportunity to show that supplements aren't just capsules, but part of a lifestyle. We show up to inspire, educate, motivate, and respond to real needs. That's how we've built authenticity, trust, and recognition, the foundations of Nikalab's visibility after just three years. Today, we organize them less frequently, but with the same goal: to be present, to listen, to educate, and to inspire smart self-care."

\- **DR. NINA NICHESKA,** CO-FOUNDER, NIKALAB

Co-created by medical professionals, but designed with lifestyle insight, it reflects a new reality: for today's health-conscious consumers, learning to care for oneself doesn't start in the doctor's offices - it starts everywhere else.

MENTAL CARE ENTERS THE MAINSTREAM

Mental health has moved from margin to center in the health dialogue. Among Gen Z, 17% report practicing mindfulness or meditation regularly, and mental well-being ranks above even physical health for many. Millennials echo this priority, identifying sleep and emotional balance as the most critical aspects of their well-being to improve.

Meanwhile, Gen X and Boomers bring their own interpretation: they value mental acuity and cognitive sharpness as markers of successful aging. This cross-generational emphasis shows that mental performance, clarity, and stability are becoming universal longevity goals, even if expressed in different terms.

As BCG's global health care research highlights, technology is amplifying this shift. AI-powered mental health tools can now detect stress or depression via daily chats, recommend tailored interventions, and even provide affordable counseling through chatbots.[38] At the same time, digital solutions such as virtual counseling and remote diagnostics are breaking down geographic barriers, expanding access to care and making psychological wellness support available to more people than ever before.[39]

Whether through digital therapy tools, community support systems, or smart mental health diagnostics, integrating psychological wellness into the value proposition is moving from optional to the new baseline.

When given one area of health to improve, generational choices vary

GEN ALPHA:
PHYSICAL FITNESS

GEN Z:
MENTAL HEALTH

MILLENNIALS:
MENTAL HEALTH

GEN X
PHYSICAL FITNESS AND DIET AND NUTRITION

BOOMERS
PHYSICAL FITNESS

DOCTOR'S OFFICES ARE **LOSING THEIR MONOPOLY ON TRUST**

In previous generations, health journeys often started with the family doctor. Today, only 35% of Gen Z and Millennials name general practitioners as their go-to source for health information - a sharp contrast to the 56% of Boomers who still rely on medical professionals first. Instead, younger cohorts are guided by a mix of wearables, platforms, content creators, and peer communities.

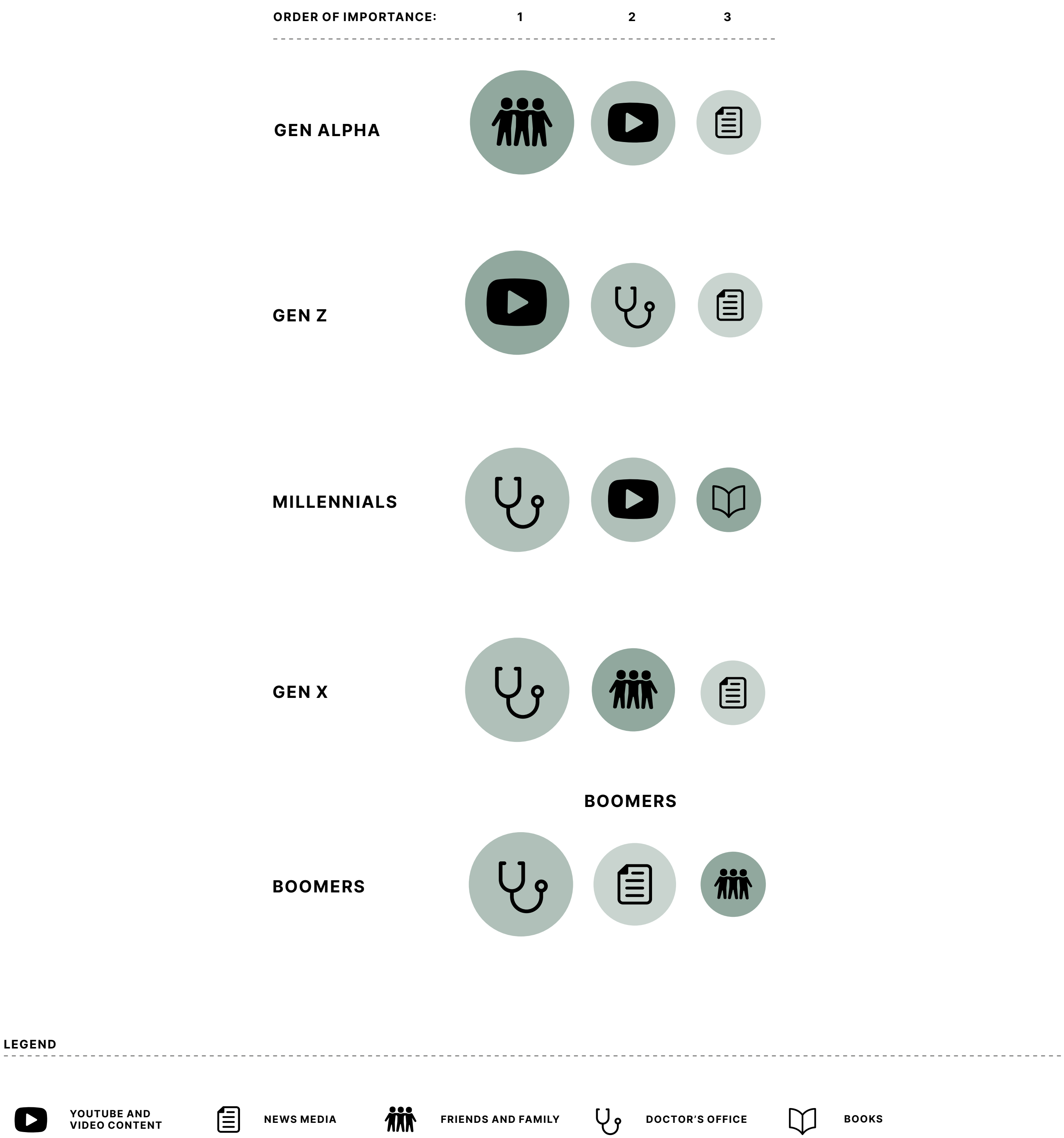
This decentralization of trust brings benefits, from accessibility to personalization, but also risks. Self-diagnosis is rising, as is reliance on unverified advice. For brands and institutions, this new ecosystem demands a dual response: transparency and engagement. Being present where health decisions are made, such as on apps, in social feeds, and through influencers, is as important as scientific credibility. The role of provider must expand to include that of educator and facilitator.

As Konrad Michalski, the Medical Director of Jutro Medical explains: *"Survey results show a declining role of doctors and nurses as the main source of health information, especially among younger age groups. This calls for a shift from directive instruction to a partnership-based relationship, focused on education, support in interpreting digital data, and motivating long-term consistency."*

This vision repositions the clinician as a guide within a digital health ecosystem: helping patients make sense of data, nudging them toward action, and supporting prevention as an ongoing journey, not a one-time visit. Here, AI becomes a critical enabler. As BCG research notes, decision-support AI can give providers instant, evidence-based recommendations and allow them to dynamically adjust treatment. Cross-platform health ecosystems, linking wearables, digital platforms, and care providers, make it possible to offer continuous monitoring and personalized advice across contexts.[40]

And while clinicians face an ever-increasing volume of patient-generated data, technology offers relief: generative AI can cut administrative burdens by up to 60%, freeing providers to focus more on patient engagement rather than paperwork.[41] The challenge, then, is not how doctors will handle the added responsibility of being both expert and guide, but how to use technology to lift that burden and make partnership-based care scalable.

Top three sources of information about health and longevity by generation:



CASE STUDY: JUTRO MEDICAL

HOLISTIC HEALTH STARTS AT THE GENERAL PRACTITIONER

As Gen Z and Millennials normalize conversations around mental wellness and expect emotional support as part of clinical care, Jutro Medical is reimagining what primary care can be. Operating as a digital-first network of primary care clinics in Poland, Jutro Medical combines traditional family medicine with a forward-thinking, patient-centric approach to mental and physical health.

Recognizing the bidirectional relationship between body and mind, Jutro trains its physicians to treat psychological symptoms as potentially somatic in origin - and vice versa. For example, mood swings or fatigue may result from thyroid issues, hormonal imbalance, or nutrient deficiencies. Each consultation begins with open, empathetic questioning. “How are you doing?” is not just small talk, it’s important clinical context.

Jutro Medical also addresses structural barriers to mental health care by positioning the general practitioner as a first-line respondent. In a public system where specialist access can be delayed, Jutro empowers doctors to initiate lab diagnostics and recommend behavioral interventions, lifestyle changes, or referrals as needed. This reduces unnecessary psychiatry visits and accelerates targeted care.

Jutro’s model is supported by smart technology: automated transcription, integrated medical records, and minimal admin burden, giving doctors more time for human connection. Educational campaigns, mental health partnerships, and a clean, digital UX reinforce the message: holistic care starts here. For Gen Z and Millennials, that’s exactly what health care should feel like.

OPENNESS TO INNOVATION DEFINES THE YOUNGER CONSUMER

Younger generations are not just willing to try new health solutions, they actively seek them. Over 40% of Gen Z and Millennials say they are likely to experiment with emerging wellness tools. From nootropics and adaptogens to infrared saunas, cold plunges, and sleep rings, these consumers embrace health as a field of exploration and expression.

As BCG’s global research highlights, younger cohorts approach health like a test-and-learn cycle: trying new approaches, monitoring results, and rapidly switching if a better option appears. They are less brand-loyal and more influenced by peer recommendations and digital communities, accelerating adoption of novel ideas. In BCG’s cross-generational data, Gen Z and Millennials also show higher uptake of non-traditional health categories, from functional foods to biohacking practices, than their older counterparts.[42] This willingness to experiment makes them the natural entry point for new health concepts, but it also raises the stakes for delivering on promises quickly and credibly.

33% & *47%*

GEN ALPHA — GEN Z

DECLARE THEY ALREADY **ACTIVELY SEEK WAYS TO PROLONG LIFE OR DELAY AGING**

42% of Boomers never use technology to manage their health

HEALTH TECH ADOPTION: DIGITAL NATIVES AND THE OVERLOOKED MAJORITY

Gen Alpha may still be in their early teens, but 42% already use smartwatches to track their health, and nearly 30% engage in digital health interactions every week. Gen Z leads the way in health tech adoption, with over 80% using digital tools to manage their health, 50% engaging at least weekly, and 20% engaging every day. Millennials follow closely behind. And yet, given that the oldest Gen Alpha is only fifteen-years-old, their adoption curve is likely to steepen dramatically as they gain more autonomy, potentially matching or even surpassing Gen Z in the years ahead.

Boomers, by contrast, remain a largely untapped market for health tech. They continue to express strong goals around nutrition, mobility, and cognitive clarity, yet over 40% report never using wearables or tracking tools - a sign of product–market disconnect. The barrier isn't lack of interest, but lack of accessible, relevant solutions. Designing for this group requires a shift from features to values: trust, ease of use, clear benefit, and personalization.

The potential payoff is significant. BCG analysis points to the next waves of innovation: Smart implants and advanced wearables - Oura, WHOOP, Garmin, Fitbit Apple Watch - that track cardiac activity, blood sugar, and sleep in real time.[43] Virtual hospital wards that use wearable-enabled monitoring to reduce hospital visits for chronic or postoperative care.[44] AI health coaches that proactively suggest interventions before symptoms escalate.[45]

It sounds life-changing, but it also raises the key challenge: how can companies truly engage an aging customer segment that is both health-conscious and tech-hesitant? If longevity tech is to fulfill its promise, we must ensure no generation is left behind.

EXPERT PERSPECTIVE: THE FUTURE OF PREVENTIVE CARE

"Research findings show the traditional role of doctors and nurses is evolving. Younger generations no longer see medical staff as their primary source of health knowledge. That's not a threat, it's an opportunity. With wearable data, AI tools, and telehealth platforms, we can move from reactive visits to proactive relationships. Care teams can receive real-time updates on patient activity or biometrics, issue nudges, and provide individualized screening plans. Nurses may become digital health coaches, engaging users based on real-world signals. The future of prevention is data-driven and personalized, but it only works if we build trust and simplicity into the system."

- **Konrad Michalski,** Medical Director, Jutro Medical

key insights *for businesses*

- **Design for identity, not just age.** Health behaviors are lifestyle-driven. Segment by values and routines, not just demographics.
- **Target moments of truth.** Age 44, age 60, and life milestones such as becoming a parent are high-impact points for repositioning products and services to support proactive health behaviors.
- **Trust is decentralized.** Medical professionals share influence with creators, platforms, and peer communities. Build presence where decisions are made.
- **Turn products into rituals.** Health is habitual. Consumers want ongoing support through diagnostics, subscriptions, and services
- **Serve the extremes.** Gen Alpha and Boomers have divergent expectations but shared needs: one seeks novelty, the other reliability. Both require intentional design.
- **Integrate mental health everywhere.** Emotional and cognitive well-being is now foundational. Make it visible in every health journey, not just siloed in support services.
- **Support co-management models.** Prevention today requires collaborative tools - from wearable data-sharing with providers to AI-generated nudges. Design for shared decision-making, not just self-care.

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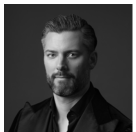

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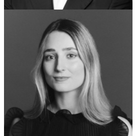

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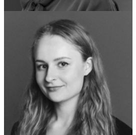

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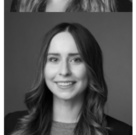

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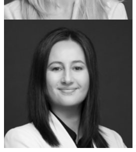

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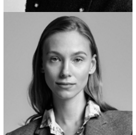

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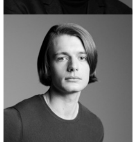

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