

The mobility report 2.0

Mobility

Discover trends,
tips and transformative
insights to inspire your
next innovation



The Mobility Report 2.0 is here to illuminate the evolving landscape of mobility health and identify opportunities for innovation in the market. Building on the foundations laid out in our first Mobility Report, this edition delves deeper into the consumer mindset, evolving conversation around mobility and potential strategies to engage more people in mobility health supplements.



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What does 'mobility' *really* mean to consumers?

Mobility is more than just physical movement. It's about maintaining independence, staying active and living life to the fullest.

But what do every day consumers think about mobility? How do they perceive this concept and are they satisfied and/or taking steps to support their own?

To uncover the answers and pinpoint untapped opportunities in the dietary supplements market, our partner, FMCG Gurus, performed a global survey across 10 countries and 8,000 participants. Here's a snapshot of their findings.

Interest in mobility health solutions



61%

recognise the link
between good mobility
and overall health

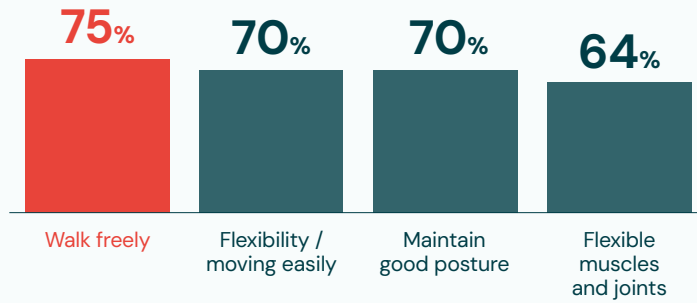
45%

are interested in
mobility solutions
even if not suffering
from issues

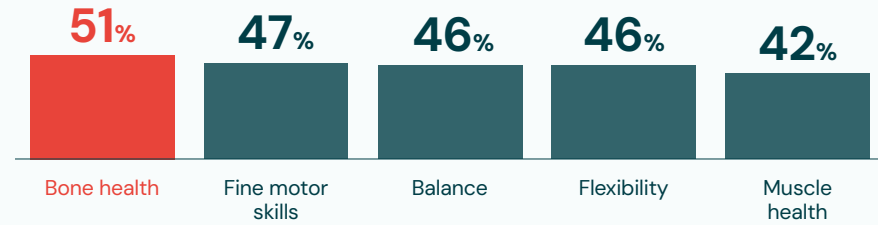
40%

regularly seek
mobility products

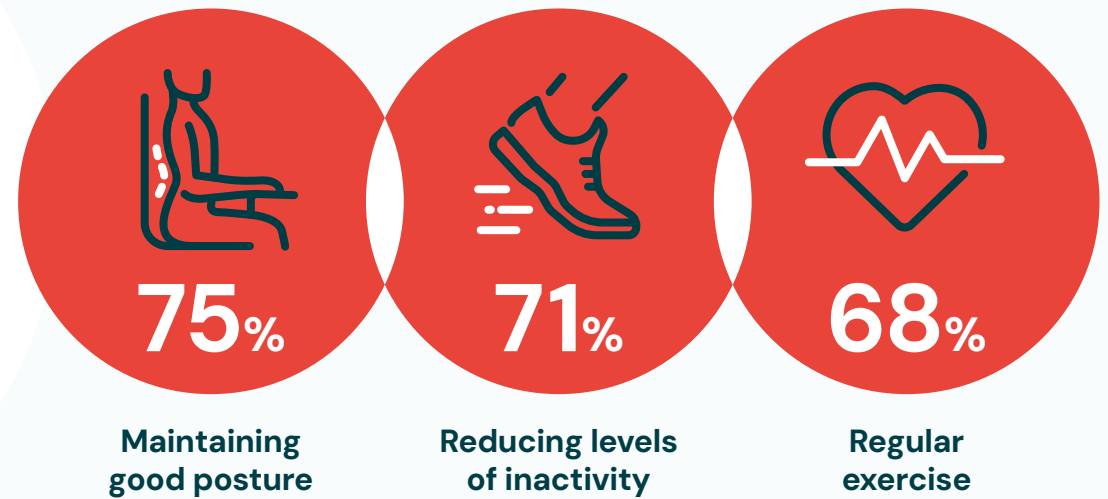
Top connotations linked to the word 'mobility'



Consumer satisfaction with specific aspects of mobility



Top 3 actions taken to sustain good mobility



Expert view: The opportunity for brands

“Many consumers recognise the link between mobility and health beyond bones, muscles and joints. Yet they still have a narrow view of what ‘good mobility’ means – largely focusing on the physical aspects of mobility, like maintaining flexibility of muscles and joints.

To change this, brands could do more to highlight the mental and emotional benefits that go hand-in-hand with having good mobility.”

Monica Gomez Navarro
Marketing Manager –
Branded Ingredients,
Bioiberica S.A.U



“Our research found that the majority of people who are interested in nutritional products for mobility already have an issue or have pursued medical advice. This indicates that many consumers are still taking a reactive approach to their mobility health, rather than proactive measures – like choosing supplements.

This mindset is likely fuelled by the preconception that mobility-related discomfort is inevitable with ageing. Or that mobility problems are exclusive to seniors, and don't affect younger people. But this simply isn't the case.

A key action for brands to break down this belief that people are powerless in addressing their mobility is to educate consumers about the broader benefits of taking a long-term and more proactive approach to this aspect of their wellbeing. Key to this is communicating that mobility can be supported before problems arise and consumers of any age can benefit from nutritional supplements targeting this area.”

Mike Hughes
Head of Research and Insight, FMCG Gurus



Meeting mobility consumers' needs

To effectively meet consumers' needs and preferences, it is essential to understand their distinct challenges, concerns and health motivations.

Here, we reveal the specific issues and drivers of four key consumer personas in the mobility space to spark inspiration for your next supplement innovation.



Henry, aged 70
Senior adult

72%
of consumers
want to maintain
independence
as they age

51%
want to keep
up with their
grandkids

"I want to maintain my mobility as I age, as well as other aspects of my health, like my immunity and cognitive function. My main motivations for supporting my mobility are keeping up with my grandchildren, who are three and six years old, and maintaining my independence as I age. I just really want to lead a vibrant lifestyle for as long as possible."

However, over the years, I've struggled with my mobility and I'm still confused about the ingredients or products I should take. I know that protein is good for maintaining muscle mass, for instance, and collagen can help my joints, but I'm not entirely sure how to choose a supplement that will best support my needs."

Supplement interests



Healthy ageing



Holistic health



Protein-rich



Easy-to-swallow



Elena, aged 28

Athlete

70%
want to continue
doing the things
they love as they
age – including
sports and travel

"Maintaining good mobility is crucial for my career as a runner. I need to prevent mobility issues and recover quickly after exercising to keep performing at my best. Looking more long-term, I also want to continue enjoying exercise even after my professional running days are over."

My biggest challenge is that my broad health needs require numerous ingredients in multiple doses. This makes it quite overwhelming to choose the right mobility supplements in a market that's saturated with confusing and contradictory information. The science is always evolving too, which can make it difficult selecting the most cutting-edge ingredients to support my performance. My preference would be a single, science-backed solution with the perfect balance of everything I need."

Supplement interests



**Sports and
performance nutrition**



Multi-functional



Convenience



Backed by science



Fast-acting



Michael, aged 41 Young, active parent

Time-scarcity is a major barrier for consumers looking to address mobility, affecting

26%

60% want to avoid the mobility issues their parents experience

"My kids are nine, five and two now – so life is hectic. When I think about mobility, what's really important to me is remaining healthy and feeling energetic so I can be the best dad possible for them, but also having the ability to continue tennis as a hobby as it's great for my physical and mental health. I'm also keen to avoid the mobility issues I now see my parents having, like joint issues – or at least delay their onset."

My work/life balance can make looking after my health really testing at times though. I often struggle with time constraints, stress and poor sleep, making it hard to prioritise supplements. So, taking a multi-ingredient product that delivers several health benefits in one go – not just mobility, but also energy support – would be ideal."

Supplement interests



Convenience, once daily



Healthy ageing



Holistic health



Sustainable and ethical sourcing

Supplement interests



Women's health



Natural ingredients



Mood boosting



Backed by science



Maria, aged 53 Postmenopausal woman

**Of consumers
looking to address
mobility**

30%
are unable to
identify the root
of the problem
or symptoms

26%
lack awareness of
how to support it

"Post menopause, I've noticed that my mobility has suffered a lot. I've been experiencing more joint discomfort for example, mainly stiffness and swelling, and also lower energy levels. My doctor says that I'm also at a higher risk of osteoarthritis now.

I really don't want the menopause to affect my lifestyle. Especially since I love to walk and do yoga – which have both really helped me mentally during this life transition. For me, it's therefore important that I address my joint health issues sooner rather than later so I can continue enjoying these activities without pain."

Spotlight on women's health

The women's health supplement market is set to flourish – growing at a compound annual growth rate (CAGR) of 5.1% from 2024 to 2030.¹ This presents a prime opportunity for mobility supplement manufacturers to diversify their portfolios and cater to the unique needs of women.

In particular, there is a substantial demand for supplement support among postmenopausal women, who dominated 32.6% share of the women's health space in 2022.¹

By developing targeted mobility solutions that address the specific concerns and challenges faced by this group, not only will brands meet the essential needs of these women, but they will tap into a thriving market and enhance their competitive edge.

Key takeaways

Creating supplements that target specific consumer populations is an effective strategy for innovation because:

- **Mobility health is universal**
- **However, consumer cohorts have unique mobility needs, concerns, motivations and challenges**
- **Consequently, there's a clear demand for differentiated products.**

Our advice?

Conduct thorough research into consumer demographics and preferences to develop targeted formulations that will resonate.



Take steps towards better mobility:

Expert advice for nutrition brands

We know that nutritional solutions can help to address consumer concerns related to mobility and support long-term mobility goals. But in a competitive marketplace, how can supplement brands step up and step out to make a bigger impact?

Cutting-edge innovation in the nutritional supplement industry requires a strategic approach that considers various factors along the journey. Here's our formula for navigating product development more confidently and differentiating yourself in a dynamic market.

1

Zoom in on evidence-based ingredients

A noticeable trend in the health and wellness market is that consumers have become more informed about ingredients and products generally and their related health benefits – and they're asking, **"Is this solution actually effective and worth investing in?"** As such, nutritional ingredients continue to be under the microscope and scientific substantiation is essential.

That said, it's vital that manufacturers ensure every element of their formulation is research-backed. Our top tip for mobility brands? Feature a branded ingredient or provide evidence from studies involving healthy individuals, not just those with mobility issues. This is increasingly important as regulatory bodies demand more rigorous data.

64%

of consumers worldwide say clinically proven claims are important when seeking mobility products



2 Combine to conquer

In today's rapidly evolving health landscape, consumers are progressively seeking solutions that address multiple facets of their mobility. So, if you want to appeal to modern consumers, bringing multi-functional mobility products to the market – that combine various ingredients to provide synergistic benefits – is one way to stand out.

But which ingredient combinations are worth exploring?

"Many consumers lack the time, motivation or financial means to address specific symptoms individually. Consequently, products that offer multiple health benefits for more comprehensive support are highly appealing due to their perceived efficacy, value and convenience."

Supplements featuring protein for muscle support and native type II collagen for joint and cartilage health, along with vitamins K2 and D3 for bone health, for instance, could cater to consumers seeking comprehensive mobility support in a once daily supplement."

David Foreman
Pharmacist and Media Natural Health Expert

"We've highlighted multiple avenues for innovation in the mobility space using our science-backed branded solutions in combination with other 'all-star' ingredients."

Mobilee®, our unique hyaluronic acid (HA) matrix ingredient, has demonstrated a possible role in muscle regeneration when combined with whey protein for example.² Whereas our Collavant® n2 native (undenatured) type II collagen plus the herbal extract Boswellia serrata can reduce joint discomfort in just five days."³

Daniel Martinez
Head of R&D Human and Animal Health, Bioiberica



3

...but think beyond mobility too

Have you thought about incorporating other consumer health trends into your mobility supplement? It might be the perfect time to do so.

Mobility fits into the bigger picture of health because it is integral to cardiovascular health, mental wellbeing, stress management, sleep and so much more – and consumers are catching on to this. This positions mobility nicely at the centre of the holistic health conversation.



"Maybe it's time to stop thinking about mobility health in isolation. In our survey, we found that consumers are interested in mobility products that promise various physical and cognitive health benefit claims. For example, in addition to a high percentage of consumers wanting to support bone and joint health, improve flexibility and enhance dexterity, 73% of respondents indicated that they look for products that help boost energy and 64% said they're interested in maintaining concentration and focus.

Given this, it's worth thinking about how mobility supplements can be linked to, or positively impact, other health areas to provide more holistic support."

Mike Hughes
Head of Research and Insight,
FMCG Gurus



4

Format considerations

Only thinking about pills and capsules?

You might want to reconsider this. Capturing the attention of younger consumers, especially, hinges on format innovation. No longer satisfied with conventional supplement formats (like pills), these demographics are driving manufacturers across the entire health and wellness space to explore novel delivery formats.

“There are significant generational drivers influencing format innovation. Younger consumers prefer gummies – with 43.4% of Gen Z and 30.9% of Millennials favouring this format, compared to 24.5% of Gen X and 18.9% of Baby Boomers.”⁴

There are also geographical variances too. In the US, while tablets and capsules are most popular, most consumers prefer gummies.⁴ Similarly, capsules and tablets are the top formats for new supplement developments in Europe.⁵ However, when it comes to more novel functional foods and beverages in this region, chewables are favoured by Baby Boomers, gummies appeal more to Gen X and Millennials and Gen Z lean towards powdered formats, like powder sticks or drink mixes.”³

Vanessa Villarreal

Strategic Marketing & PM, Bioiberica S.A.U



“Today’s savvy consumers want supplements that offer effectiveness and convenience – this holds true for individuals looking for mobility solutions too.

In recent years, there has been a rising interest in functional foods and beverages – like coffees, teas, waters, juice and milk, as well as snacks and even desserts – markedly among health-conscious consumers. One way to address this demand is using flexible, low-dose ingredients that are compatible with other health actives.”

David Foreman

Pharmacist and Media Natural Health Expert



5

On the label

Clearly articulating the benefits of mobility supplements through transparent messaging and educational content builds trust and empowers consumers to make informed decisions about their health. But it's not the only factor to think about... Communicating sustainability efforts, emphasising quality and transparency and highlighting research on packaging to support health claims can further differentiate brands.

The FMCG Gurus report found that sustainability claims – like environmentally friendly packaging or sustainably sourced ingredients – were a really important consideration for more than half of consumers buying mobility products. This underscores the significance of demonstrating accountability and responsibility for all to see.

51%

of global consumers say they would like to see sustainability claims on mobility products

Top tips for engaging more consumers in mobility

Now we're clear on the key ingredients for stand-out supplements – how can brands motivate consumers to use them?

In this section, we explore four strategies for overcoming barriers to uptake of mobility supplements and tips for attracting a broader consumer base. By addressing these roadblocks, brands can effectively reach and engage a wider audience and ensure their supplements make a positive impact on mobility health.



1

Reframe mobility

Encourage consumers to re-evaluate their attitudes towards mobility by developing a narrative that focuses on proactive health.

Here's how:

- Highlight that mobility is not just about moving freely, but it is the cornerstone of overall health and wellbeing.
- Emphasise its positive impact on mood, cardiovascular health, performance and more.

2

Spotlight the link to healthy ageing

Although consumers are not making a strong connection between mobility and healthy ageing according to the FMCG Gurus report, they are mindful that poor mobility is something that can affect quality of life, especially in senior years.

To shift consumers' perceptions of mobility and motivate them to take action, there is an opportunity for brands to reinforce the links that mobility has with healthy ageing. Making sure that mobility is discussed within the wider healthy ageing conversation could broaden consumer awareness of its significance and role in overall health journeys.

The connections don't stop there though. Brands could also draw parallels between mobility and other growing health markets, like women's health, to reinforce its importance.

3

Use clear, evidence-based communication

Consumers continue to place greater scrutiny on whether products are good value for money. And transparency is synonymous with value.

This means that it is no longer enough for brands to simply state the benefits of a product; they must validate any claims with evidence. But science can be difficult to understand. To bridge this gap, brands should simplify complex scientific concepts, presenting them in a way that consumers can easily grasp the value and efficacy of the product.

4

Inspire your audience by using storytelling techniques

To truly resonate with your audience, it's crucial to go beyond presenting just facts and benefits. That's why we recommend using storytelling techniques to create a deeper, emotional connection with consumers.

For example, consider sharing real-life success stories of individuals who have experienced significant improvements in their mobility and overall wellbeing thanks to your products – like the retiree who took up biking again, a hiker who conquered mountain trails after a knee injury or the musician who overcame joint pain in their hand. These personal narratives not only humanise your brand but also make the benefits of your products more relatable and tangible.

Bioiberica has 20+ years' experience in joint health and mobility

We offer a range of high-quality branded ingredients backed by science, for optimal joint, muscle and tendon health that are natural origin, widely researched and on-trend.

Collavant[®]n2

Collavant[®] n2 is a next generation collagen for joint health innovation, supported by seven scientific studies. A trusted source of quality, science-backed native (undenatured) type II collagen extracted from chicken sternum, it is 100% sourced and manufactured in Europe. Through a strictly controlled process that preserves the active parts of the molecule, quality is guaranteed.

Use	Joint health
Dose	40 mg/day
Application	Dietary supplements

Tendaxion[®]

Tendaxion[®] is a specific formula for tendon health containing hydrolysed type I collagen and mucopolysaccharides, supported by five scientific studies. This is typically recommended in combination with physical therapy.

Use	Tendon health
Dose	520 mg/day + 60 mg/day vitamin C
Application	Dietary supplements

Mobilee[®]

Mobilee[®] is a hyaluronic acid matrix ingredient containing a patented combination of hyaluronic acid, polysaccharides and collagen, supported by 12 scientific studies. Authorised for use in food products, it's possible to support joint health and muscle strength at a low dosage thanks to the synergistic effect of its three naturally-occurring components.

Use	Mobility, including joint & muscle health
Dose	80 mg/day
Application	Dietary supplements & functional foods

CSbioactive[®]

CSbioactive[®] is proven to maintain joint health. It is the most thoroughly researched chondroitin sulfate on the market, and therefore used as a benchmark ingredient across industry.

Use	Joint health
Dose	800-1200 mg/day
Application	Dietary supplements

Why Bioiberica?

Bioiberica is a European manufacturer. In addition to our specialisation in biological-origin ingredients for mobility, our production capacity and vertically integrated model guarantees full traceability, security of supply and sustainability.

We also offer extensive product and market support, and innovation insights, enabling manufacturers to bring solutions to market faster, and with enduring success.



Science-backed ingredients



Market insights



Marketing support



Regulatory support

Notes

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About Bioiberica

We believe that collaboration and shared insights are key to empowering the healthcare evolution – and creating future-facing solutions in growing and emerging health areas.

Bioiberica is a global life science company with more than 45 years' experience in the research, production and commercialisation of molecules of high biological and therapeutic value for the pharmaceutical, nutraceutical and food industries.

This specialisation positions Bioiberica as a leader in the manufacture of the active pharmaceutical ingredient (API) heparin, as well as a world reference in the production of other biologically-derived APIs and scientifically-backed branded ingredients, suitable for mobility, digestive health and skin & beauty.

Committed to our partners' success, Bioiberica is the perfect partner with which to explore new opportunities and developments in human health.

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