

WELLNESS THOUGHT LEADERSHIP PAPER

Matt Herd,
VP Consumer

sagentia

The pursuit of wellness:

striking the balance
between perception
and proof



The trend for wellness is everywhere, blending food and beverage, nutrition, beauty, consumer health and even industrial agriculture.

At Sagentia we believe that an enduring and market leading product can only be delivered if positive consumer perceptions about its wellness benefits are grounded in clear and tangible scientific claims. We're exploring the cross-pollination of technology across industries to address this new super-trend, looking under the microscope (often literally) at the proof behind the scientific claims, and finding the meaning and drivers "behind the consumers' desires" and appetite to change their lifestyle to achieve the wellness results they're aspiring to.

Wellness is a

\$3.7

trillion industry [Global
Wellness Institute].

Wellness as a trend

Wellness is broad, aspirational and sometimes ethereal in how it's presented, promoted and marketed. It has become an umbrella concept to provide a deeper and truer expression of a whole person's state of wellbeing, with beauty, nutrition, mental and physical health, all well-balanced, harmonious and positive. But like all major trends, it's open to exploitation and misdirection.

The wellness trend is driving consumer aspiration to transform and enhance all aspects of their lives, searching for total physiological improvement. For product messaging, wellness has become the holistically conscious upgrade to the 'mind, body and soul' of old.

We are seeing a major shift in brand focus to meet this: traditional food and beverage companies are now interested in beauty, while traditional beauty brands are looking at nutrition and the 'beauty within'.



The wellness market
has grown by

12.8%

since 2016, representing

5.3%

of the global
economy's output.

Consumer worries and aspirations

As consumers, we are given so many more aspects of our personal state to worry about and the seemingly ongoing – and often conflicting advice – from a variety of brands and publications often adds to consumers' confusion.

We want to measure, track, compare, review and respond both to the claims brands are making and the information we can get from devices and products. The questions we raise here push this further: what are the tangible benefits, are they 'real' and how are they communicated to the consumer? And, if results are proven, how should we expect the consumer to react?

As scientists, designers and UX developers, our aim here at Sagentia is to help brands make an impact with provable benefits and clear guidance to customers – we believe this will produce enduring and engaging products that will live much longer than any short-term trend.

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Wellness – benefits that promote change

The wellness industry is not without its controversy: many brands are perceived to be jumping on the wellness bandwagon in order to promote their product or service.

Therefore, amid all the claims and content there is the fundamental question about efficacy and how much can be proven. And for us, that is key.

I believe – and my reading confirms – that wellness goes beyond the product: it covers sustainability, ethics, manufacturing and distribution methods, impact on the environment, being good for the community and the sourcing of ingredients. There is much written about this and a myriad of companies that can help brands ensure these factors are met and portrayed positively and explicitly with target customers.



On the market today there are devices that monitor hydration, online shopping lists that update depending on your nutritional signs, skincare formulated to meet your daily needs, activity and climate. But what other metrics need to be considered to give a fuller picture of a healthier lifestyle?

The bit that is missing is the demonstrable efficacy: what are the tangible benefits, are they ‘real’ and to what extent, and how are they proven? Going one step further; if results are proven how should we expect the consumer to react to that? Is the result compelling enough to spark a true change in someone’s behaviour or even lifestyle?



What are consumers willing to do and change to get the result?

We can research, record, track, measure, monitor, everything from our food to our sleep – but to what end and for what benefit? A better approach might be to understand ‘what is wellness for an individual’?

Hydration example

An interesting question is ‘how much do consumers care?’ For example, market data tells us that we, the consumers, are interested in understanding and improving our hydration. Many wearables, smart bottles and skin worn sensors are doing their bit to measure and infer something useful whilst blending in with our daily routine, nudging us towards small lifestyle changes that don’t require much energy or thought.



But what if we told you we have a far more accurate measurement method that can take a direct and a true hydration measurement rather than the inferred, but to do this you need to take a regular urine or blood sample? Is the result worth the inconvenience? Would consumers be prepared to do something more intrusive and complicated in order to get a more accurate reading? Are we concerned or interested enough to modify our lifestyle? For this

example, we have found that the answer for most people is no, and the equation of pain vs gain for a non-invasive wearable is weighted away from pain.

Our aim is to help brands better understand their customers’ wellness aspirations and find the right balance between technical complexity, user convenience and communication to create useful, informative and engaging user experiences. We look to uncover the right balance between accuracy and convenience to understand someone’s willingness to go through the pain of lifestyle change to achieve the result they want.

Measure, monitor... and then what?

The Internet of Things is suggesting that everything is – or at least can be – connected. But this is leading to an increase in questions: Why is everything connected, what does it tell me, how can it help me, what am I supposed to do with the information?

And we’re especially seeing that in the wellness sector.

Through our collection and connection of Smart devices – our phones, watches, heart monitors etc. – we can track everything: the food we eat and nutrients we’re getting, the number of steps we take, our heart

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rate, our sleep – but what's the value of the information we get and how should we navigate it to make it useful and relevant? For example, we can track our sleep but will it help us sleep better? We can be alerted to the fact we're dehydrated but it doesn't tell us what we should drink to replenish the body with the right nutrients it needs. In addition, does the information we get from tracking, monitoring and measuring tell us not only what to change but how to change it?

These are the sorts of questions – and challenges – we at Sagentia thrive on: and ones we're talking to our clients in the consumer, personal care and beauty sectors about.

Measure, deliver, proof

We see that there is a common and more traditional approach of 'find some technology that measures x, y and z, and create a product around it', we believe that this is the wrong way around.

We believe the approach instead needs to be: what's the benefit of a product (e.g. healthier skin) and what is actually happening on a physiological level (e.g. promotion of collagen growth).

From here comes the focused, targeted identification of technologies that can help measure this physiological change directly. It is the pairing of the benefit and a measurement of the efficacy that's going to deliver true value to product development, brand engagement, trust and consumer benefit.

Another approach that we're being asked about and exploring with our scientists and technologists is what aspects of beauty can and are desirable to be measured, for example, hair condition or skin health. Once identified, what are the ingredients that enhance that? Once we know both – we put them together in the best pairing.

Perception vs reality

Understanding the difference between, and the challenges resulting from, the perception vs reality of a health claim, product, device etc. should not be underestimated. In our work, we have seen that there can be a significant mismatch between perception and reality: something viewed as healthy may not have any benefit for physical and mental well-being. Conversely, releasing a product based on a positive perception but limited scientific evidence can also be risky. Brands should be cautious about releasing a product which has a negative perception even with positive scientific evidence as this can be an uphill struggle. Enduring and engaging products are typically those which build on positive perceptions and robust claims.

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For example, marketing hype has fuelled perceptions about the benefits of alkaline water, resulting in significant sales despite very limited scientific evidence of its health benefits.¹ In this case, a positive perception has driven significant product sales and it could reasonably be argued that the science is a secondary concern.

However, we believe this is a risky approach for two reasons:

- 1 trends are by their very nature short term, and sales will dwindle quickly when consumers move on to the next one
- 2 there is a risk of a consumer backlash if and when scientific evidence eventually emerges that debunks a trend.

The latter should be of significant concern as this can have a long-lasting effect on a company's reputation and so the implications of addressing perceptions before science must be very carefully considered.



Another example is the perception of difference between freshness and cleanliness. Air purifiers in China were bought to keep homes free from allergens and toxins, yet while the air was clean, it was not perceived as 'fresh'. These products drove a negative perception despite clear scientific evidence supporting their health benefits. As a consequence, consumers were literally opening their windows to let in the fresh air.

The trend for preferring 'natural' over 'processed' ingredients also highlights the tension between perception and reality. Natural is often likely to lead to

healthier choices – or at least a greater knowledge of where your food has come from or its route through the supply chain. But take the example of sea salt or even chalk – a new favourite for cosmetics ingredients: 'natural' may have been superb several thousand years ago, but today? The salt and the chalk is going to be natural yes, but with that comes all the impurities too. In this case maybe the processed option may truly be the healthier one.

The motivation aspect of driving change is much harder to get to grips with. This mismatch between perception and reality usually comes from the complexity of what is causing the problem. For example, the scientific research, analysis, guidance and insight is too challenging for the average consumer to want to consider, for what are relatively simple lifestyle choices and therefore part of the challenge is in making the science more engaging and accessible.

Sagentia: the science of wellbeing

The trend for wellness is going to continue to drive consumer behaviour, new products and a challenge for brands to demonstrate their credentials across the supply chain and at every stage of the customer journey. As consumers get used to monitoring, measuring and tracking, the drive is going to be on connecting this up: making better decisions as a consumer, and, for the business, getting detailed insight to support product development and delivering a more personalised experience.



Harston Mill
Royston Rd
Harston
Cambridge
CB22 7GG

+44 (0) 1223 875200

info@sagentia.com

 Sagentia

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When doing this work with clients we're finding that we're flipping the usual approach of 'finding some technology that measures x, y and z, and create a product around it' on its head. And that's exciting!