

healthcare now | Unique insights to navigate a complex market

#1

There's no '&' in
Health & Wellbeing



About Healthcare Now

Rooted in research and insight, essential provocation for brands and businesses in the health & wellbeing space.

We've got a long history of helping brands navigate the complex sphere of healthcare.

The main challenge used to be regulatory compliance, but today there are so many more factors to consider. It's a landscape completely changed by events of recent years and that change is constant...and happening quickly.

As two entities working across the full spectrum of health & wellbeing, from common ailments to rare diseases, Bray Leino and Solaris Health are in a unique position. In 2022 we came together to commission independent research agency QuMind to conduct a nationwide healthcare study

of 1,000 respondents across both consumer and core patient groups*. This exclusive, quantitative and qualitative research study – State of the Nation Wellness Report – unlocks previously unattainable insights to power healthcare marketing, now.

Through our programme of thought-provoking content, we'll reveal the beliefs and experiences that are shaping health attitudes and behaviours. From consumer and patient insight, we'll explore human perspectives and derive potential implications for brands and businesses navigating this space. Ultimately, we set out to see the world of healthcare through the eyes of those that matter.

*Those in primary care for with an ongoing medical condition and those with an ongoing chronic/rare medical condition.





#1

There's no '&' in Health & Wellbeing

Core insight: There's no '&' in health & wellbeing

Is the retail environment driving an
over-simplification of a complex category?

Health & wellbeing is a broad subject – a catch-all term for anything and everything that touches the physical, mental and emotional health sphere.

In the fast moving and ever changing sphere of healthcare, we've stopped to take a moment to consider what health and wellbeing really mean.

From literal meaning and association to personal goal definition in this space, the research insights and perspectives in the first of our Healthcare Now series spark new thinking about how brands can stay connected and relevant in the complex world of 'holistic' health & wellbeing.



+ Defining health & wellbeing

Health, although complex and increasingly multi-dimensional, is a relatively easy term to define.

Whilst it conjures up many associations related to the body, raised awareness around mental health in recent years has brought the mind into focus too.

According to our study, people define physical health as exercise / keeping active, fitness, healthy eating / nutrition, appearance / size, aches and pains and supplements.

Mental health is understood as how you feel emotionally, anxiety / stress, depression, happiness / security, relationships / family, openness, and medication.

However, respondents had more difficulty defining wellbeing beyond the domain of emotions and happiness. Their responses alluded to a 'state of being' related to how we perceive our lives. One that would ideally include the presence of positive emotions and moods (e.g. contentment, happiness or joy) and the absence of negative ones (e.g. anxiety, envy or regret).

“ **When you say health, you automatically think of illness and physical health, but it also encompasses mental and emotional side.** ”



+ Health & wellbeing are inextricably linked

As marketers, we have a bad habit of trying to separate health & wellbeing, running a very real risk that the latter is viewed in the realms of lifestyle. But of course, they go hand-in-hand. Happiness and satisfaction will be dramatically reduced for those living in constant pain, with reduced faculties or under the spectre of serious illness. Even a mild headache or eczema flare-up influences how happy we are on any given day. So thinking of health & wellbeing separately is misguided and missing the fundamental fact that the two are inextricably linked – and can enhance one another.

Wellbeing is about much more than 'living right'. As one respondent suggested: wellbeing relates to how satisfied you are with your life. In this context, the space in which wellbeing brands can play extends way beyond the current category offering. If wellbeing is about judging life positively and feeling good, then yes, you might exercise four times a week, eat well, meditate before bed and burn therapeutic scented candles. But are you happy and fulfilled? Do you feel mentally and physically strong? Are you comfortable with yourself such that you feel authentic? Are you happy with your work situation such that you feel valued? Are you satisfied in your relationships with others, such that you feel connected, with a strong sense of belonging?

Our research suggests that **treating health & wellbeing as separate entities misses the opportunity to make valuable connections with audiences.** For example, a brand of running shoes that only plays in the realm of physical fitness is failing to acknowledge the mental uplift delivered by a run, the improved long-term mental health that a positive running routine facilitates and the social wellbeing when improved body image translates to more social behaviour.

When brands don't make these connections, they at best undersell the role they can perform. Worst case, they gravitate around category generic insights which, in the case of healthcare, often means everyone trying to own 'confidence' in cliched and unremarkable ways.

Let's instead adopt the perspective agreed upon by our respondents - that "wellbeing is broader than health" and, as an ever expanding realm, there is huge opportunity for brands in the hitherto separate 'health' space to consider their role within it.



“ Wellbeing is broader than health, it relates to how satisfied you are with your life ”



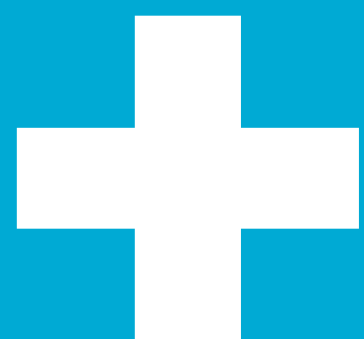
Summary

Core Insight:

There is no '&' in health & wellbeing.

What this challenges:

Convenient over-simplification and category conventions.



Nuggets and numbers

Key stats and verbatim from our qualitative and quantitative research.

'Life' gets in the way of health & wellbeing.

1 in 3 people say health & wellbeing is a top priority.

But 43% can only prioritise it when "life allows them to".

This equates to 22.2 million people in the UK.

Respondents broadly view health as being related to the body, however there is still a connection to the mind.

Acknowledging the complex and holistic nature of the category in communications is key.

“ When you say health, you automatically think of illness and physical health, but it also encompasses mental and emotional side. ”

“ Many issues/conditions that anybody has... any sort of illness or health conditions can have an impact on physical and mental health and vice versa. ”

“ If you manage your physical health properly you might not need to manage your medical health quite as much. ”

“ There is a crossover between physical and mental... You may have an illness that can later affect your mental health... there is definitely overlap, definitely. ”

Physical exercise has become even more essential to people's routines.

57% partake in some form of physical activity to look after their mental health & wellbeing.

Points of view

Our team offer unique perspectives on the core insight.



Market research perspective:
Melodi Akca

Research Director – QuMind

This research confirmed our hypothesis that health (mental/physical) and wellbeing are intrinsically linked but people take different actions and seek different kinds of help depending on the complexity and severity of their health issues.

Brands will need to stay ahead of behaviours and trends such as the impact of social media usage on mental health, balancing potential stigmas around prescription medication vs. increase in popularity of more holistic and herbal treatment, to name but a few, to stay relevant.

Brands must communicate their understanding of the overlapping nature of this category whilst simultaneously tailoring to different needs in recognition that no one provision of service or product 'fits all' – a fine balancing act.



Tech perspective:
Bradley Stacey

Technology Strategist – Bray Leino

The idea of putting on a device to hit your step goal dates back in the 1960s, and for decades health tech didn't develop beyond that. Since 2015 we've seen the health tech space become much more competitive. Brands like Fitbit, Apple and Whoop have tried to broaden their offer with their own take on wellness. They analyse stress, sleep and fatigue. They measure your walking steadiness, invite you to track your period, and remind you to meditate. This is all to prove their value beyond selling chips and sensors that are the same. Healthcare brands can learn from this. They should seek recognition for their contribution to wellness beyond their core utility.



Retail perspective:
Fiona Beauchamp

Activation Director – Bray Leino

In terms of positioning, the prize is in finding a space your brand can occupy, that transcends physical, mental and social wellbeing. The in-store convention for separate aisle perpetuates a sense of unrelatedness that is false. Brands that truly can find a space that transcends both, might better succeed by looking for alternative routes to market.



Contact us

For more information on how we can help drive growth for your your health & wellbeing brand, contact Sam Crocker
scrocker@brayleino.co.uk



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