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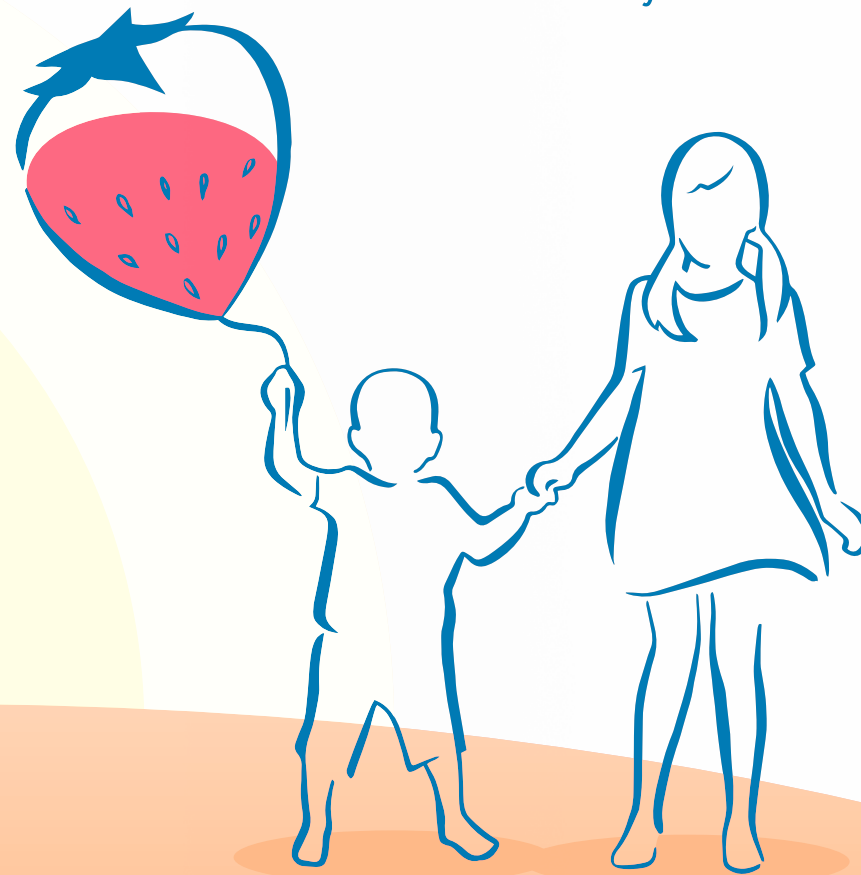
QUARTERLY MAGAZINE

WELL, WELL, WELL.

12

THQ
PART OF CEUTA GROUP

Optibac
Trusted friendly bacteria



Strawberry
KiDS Gummies

Naturally delicious fruit gummies with
scientifically proven friendly bacteria

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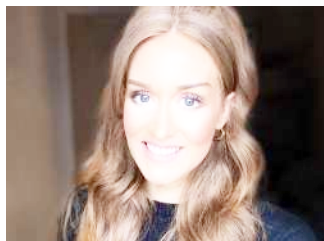
Contributors



David Collyer

Chief Growth Officer
1HQ UK

David is a classically trained FTSE 100 'T-Shaped' senior level Brand, Marketing & Digital leader, with over twenty years award winning strategic experience, both agency and client-side. David is a specialist in marketing transformation that drives revenue growth & EBITDA acceleration: Brand architecture and proposition, creative strategy, marketing function capability, operational best practice, efficiency and effectiveness.



Chloë Young

Senior Account Manager
1HQ NL

Chloë has over a decade of experience managing both award-winning integrated marketing campaigns and strategic design projects. Her expertise spans a variety of categories from luxury automotive, to sports and FMCG. She is people-driven and loves working with clients to bring their strategic and creative ambitions to life.



Emma Freeman

Senior Account Director
1HQ UK

Emma has over 15 years' experience in leading strategic brand and design initiatives, both client and agency side. Emma has a true passion for brands and ideas that connect with consumers and translate to commercial success.



Scarlett Irons

Junior Strategist
1HQ UK

Scarlett has recently completed a degree at the University of Bath in Management with Marketing, specialising in Brand Management and Strategic Innovation. Since graduating, she has already been immersed in a wide range of FMCG categories, as well as developing more specialist insight into Luxury Beauty and Sport. She thrives on client collaboration and enjoys helping them to position and grow their brands and products more effectively.



Ian Watts

Associate Creative Director
1HQ UK

Starting his design career at 1HQ in 2008, Ian then moved to Singapore in 2011 to work across iconic International brands including Friesland Campina, AkzoNobel and Heineken. Returning to the 1HQ team in 2020, Ian is now pushing creative boundaries on global projects, creating positive impact whilst championing how influential brand evolution is to the future of our planet.

Contributors

**Betsy Bebbington**

Account Director
1HQ SG

Betsy holds 14 years' experience in branding and creative communications, with nine of those years spent working in the dynamic region of Asia and with APAC teams. A facilitator of growth through forming genuine partnerships; leading a diverse portfolio of clients and their brands; from major blue-chip FMCG, consumer, through to hospitality and corporate insurance. Passionate about art and human psychology, she thrives when brands engage with consumers in a meaningful and relevant way.

**Tom Wrigley**

Digital & Social Communications
Strategy Director
1HQ UK

Tom is an award-winning strategist with a passion for creating digital and social brand experiences that deliver meaningful results. His hybrid background in social media, advertising, digital innovation and direct marketing means he's driven to connect downstream digital and social experiences with upstream brand and business metrics, to better prove impact and value.

**Hillary Hoch**

Account Director
1HQ US

Hillary has 20 years of CPG experience, with a unique background combining design and client services. She has led global redesign initiatives, new product development and extension systems across multiple categories including Personal Care, Beauty, Spirits, Sports Nutrition, Foot Care, OTC, and Vitamin Health. She loves building relationships and partnering with clients to solve creative and strategic solutions. Hillary believes the best work is created by a strong team!

**David Gray**

Managing Director
1HQ Creative Leap

Passionate about brand and business strategy, David has worked across corporate, product and service brand positioning and communication strategies within many categories including healthcare, professional and financial services, beverages, telecommunications, commodities and automotive. With a background in international branding and design consultancy, David founded Creative Leap, an award-winning, specialist OTC healthcare and wellbeing-focused communications consultancy.

Now every brand is in the wellness business!



David Collyer

Chief Growth Officer - 1HQ UK

The shift in consumer mindset and behaviour, from healthcare (outcomes focussed) to self-care (preventative ownership) is not a new trend. We identified and embraced this trend some time ago in my previous capacity as Marketing & Digital Director at Nuffield Health, working to build the brand's social impact and purpose to encompass the notion of 'building a healthier nation'. And we are not alone, from NASA to Nobel prize winning research lots of people have embraced a Bioresilience approach/strategy – our physiological ability to withstand threats.

But the global pandemic that is Covid-19 has accelerated this trend into a fact, establishing a shift in consumer behaviour beyond expectations. And the data now exists to corroborate this

trend. The Covid-19 Pandemic has seen FMCG sales increase by 6.4%, driven by an increase in stocked lines in the healthcare and household categories. Supermarkets have seen their share of OTC sales increase +40% and Google has seen an increase in searches for natural immunity-boosting products.

This aligns to the trends we are seeing across our parent and group companies (e.g., Ceuta Healthcare) as consumers take an increased interest and ownership of their wellness through pro-active, preventive healthcare. 25% of adults plan to spend more on healthcare and immunity products and 20% will be exercising more. FMCG categories such as food, drink and supplements that support these trends are already seeing the commercial impact.



20%
of adults will be
exercising more



25%
of adults plan to spend
more on healthcare and
immunity products

Now every brand is in the wellness business! As consumers move from a mindset of "make me better" to "keep me well", all brand owners will be asking themselves what the role of their brands are, or should be, in the new world of preventative wellness. >>>



6.4%
increase in FMCG sales, driven
by healthcare and household



+40%
increase in Supermarket
OTC sales

A key insight into this new 'keep me well' attitude is that consumers want the ingredients that deliver these health benefits (e.g., immunity boosting) but without compromise. They still want enjoyable and tasty products, food and drink that doesn't feel 'healthy' per say and devoid of the negative 'sacrificial' cues associated with some specific health products/diets. We are also seeing the nation cooking and cleaning more than ever, discovering and cooking with ingredients that deliver 'self-care' and implementing new cleaning regimes. Behaviours are also more focussed in the household (e.g., anti-bacterial), which is again a shift in consumer mindset to preventive vs outcome focussed.

Consumers want health benefits but without sacrifice.

They want the ability to look after themselves better without really noticing or sacrificing on taste, quality or routines they enjoy. Hence the term we have honed - 'Enjoyable Wellness'. The potential to keep ourselves well (preventive mindset) without compromise (enjoyable). These behaviours are not new to me. As I write I can recall a Grandparent who used to take an Aspirin every day 'just in case I get headache or a cold' - this is also a preventative mindset that current generations didn't possess... until now.

Not only are we seeing some of the global household names we work with rapidly innovating and implementing NPD projects to address this consumer need, but they are also aligning the purpose of their brands and products towards a 'keep me well' positioning. This raises huge opportunity for existing FMCG brands to flex their brand propositions

and design codes to dial up and into 'Enjoyable Wellness' - reinforcing the previously ignored, uncared for and uncommunicated ingredients within products which have now become the communication hierarchy superstars. E.g., did you know that the Turmeric in your favourite Chicken soup is a natural anti-inflammatory!

However, the challenge for FMCG brands is that the category navigational codes, design cues, copy and claims are traditionally very different between healthcare and FMCG brands. With this in mind, it is unsurprising that many of the core challenges encountered by FMCG brands are found at the increasingly blurred boundaries of 'Enjoyable Wellness'. >>>



Photo by Karolina Grabowska on Pexels



A word from...

David Gray

Managing Director - 1HQ Creative Leap

It is interesting to see how 'friendly bacteria' in the form of probiotics has become a poster child of the selfcare/ preventative revolution. The category is exploding with both Boots and Holland & Barrett launching private label ranges as consumers are investing in gut health as part of their immune defence strategy. Immune support sales are up +42% YOY, Multivitamins are up +20% YOY and probiotic supplements, drinks and active health yogurts are also in significant growth.

Our recent restaging of Optibac has reimagined the design codes of the category to create meaningful difference and cut through for the brand.

Not surprisingly Google has seen a huge increase in searches for immunity boosting ingredients for food preparation & cooking. We've also seen a huge increase in the theme of vitality and revitalisation from the markets we work in, as well as category innovation and brand partnerships:

- > Vitamin trackers like VitastiQ & Viome are allowing consumers to monitor and optimise their health by translating insights from your body into personalised nutritional recommendations to help address the root cause of inflammation, biological aging, and chronic disease.

- > Convenience home delivery food brand Gousto is even partnering with Living DNA analytics to provide meal recommendations tailored to your ancestral make up and associated cultural consumption habits. There are now even wearable wristbands to scan ingredients in store to check for lactose free products.

David Collyer is right to point out that if you are in consumables 'every brand is now in the wellness business'. The category will be enjoying significant growth for the foreseeable future and we're ready to help our clients identify and leverage the role their brands can play in enhancing the wellness of the population. **Q**



VitastiQ 2
Photo courtesy of VitastiQ

Photo by Andrea Placquadro on Pexels



The FMCG and Fast-Moving Consumer Health (FMCH) markets are not the only categories enjoying the benefits from this shift in consumer behaviour. Sleep is another thing we can't get enough of (literally). Consumers are doubling down on the quest for rest, with global searches for sleep rituals and workouts spiking on Pinterest during the pandemic.

There's also a rising interest in circadian rhythms – optimising the body's internal timekeeping system via everything from wearables and sleep apps to personalised dietary plans. More and more, the health benefits of sleep

are influencing the brand strategy of businesses in, or entering, this category. FMCH and MedTech brands are focussing on NPD in this area - from pillow sprays and CBD oils to new digital apps such as Calm.

While I was Director of Marketing Strategy at Intercontinental Hotels & Resorts (IHG) we developed the 'Sleep Advantage' proposition/brand attribute for the Crowne Plaza Hotel brand – a range of sleep enhancing products to help guests get a good night's sleep, after all that's what you're selling in hospitality! We also launched 'snore monitors' but that's another story!

“Consumers are doubling down on the quest for rest”



Binoid CBD Wellness Drops
Photo by Binoid CBD on Pexels



Calm Sleep mist and Meditation and Sleep App
Photos courtesy of Calm

I think there is huge opportunity for FMCG and FMCH Power Brands to innovate into the area of rest and sleep. After all, there is nothing better for you and more enjoyable than a good night's sleep! Equally the agility and focus that the hospitality sector, as well as retail, has had to put into cleanliness is another shift and extension of this preventative mindset. This development requires a new and foreign communications strategy in hospitality and travel to address the consumer need Covid-19 has created.

One of the reasons I joined 1HQ is because I find this shift in consumer

behaviour somewhat cathartic. The thought of 'Enjoyable Wellness' becoming 'a thing' and helping brands to define the connected holistic wellness purpose within their brand strategies and architectures inspires me.

From household cleaning to the hospitality sector, worlds are merging as consumers realise their choices/purchases can be both 'good for you' and 'effective', helping to showcase a need for brands to consider their positioning around connective and holistic 'preventative' shift towards Enjoyable Wellness. Well, well, well! **Q**



Connected wellness across categories

We asked each of our global studios to delve into a specific category to explore how brands are adapting to trends.

From innovations encompassing enjoyable wellness, to new developments helping consumers adopt preventative healthcare measures, what certainly stands out within each category is the move to a connective holistic wellness approach. >>>

- > **PERSONAL CARE**
- > **HOUSEHOLD MAINTENANCE**
- > **FOOD & BEVERAGE**
- > **HOSPITALITY**

➤ PERSONAL CARE

Beauty is only skin deep

Photo by Sara Shimazaki on Pexels



Chloë Young

Senior Account Manager - 1HQ NL

The significant changes to our lifestyles, diets and screen time over the past twelve months has not only had an impact upon pressures towards our physical appearance, it has also caused many of us to look inward: placing greater expectations from our beauty and personal care brands as advisors for our health and wellbeing.

Major online beauty retailers including Sephora, Boots, LookFantastic and Cultbeauty have all launched wellness sections since the pandemic began, providing recommendations on inner and outer health, demonstrating the importance of self-care during times of anxiety.

We have seen a popularity shift from BHA's, retinols and peels; to restorative spirit-lifting products; with bath and skin care rituals becoming a sacred moment of escapism from our living room offices. CBD remains a popular ingredient, with aromatherapeutic scents, soothing textures and holistic brands such as Rituals, Aveda, Neom and REN seeing an increase in sales.

As more extreme stress is placed on our skin from central heating and outdoor exercise, the need for anti-oxidative products has increased. Dutch brand Combray produce luxury oils containing only two natural ingredients: Oxofulleram and a plant-based oil. Together, the substances prevent damage and inflammation caused by environmental factors such as pollution, UV, cold and wind exposure.

A shift in focus to our inner health has seen a boom in the supplement market, blurring lines between the health and beauty categories. We now see brands such as Murad and Beauty Pie offer ingestible skin-improving pills and collagen powders, whilst traditional supplement brands such as Olly and Centrum now offer beauty-focused vitamins.

Aside from some 'unconventional' hair cutting and dying techniques that have graced our social feeds: damage protection and 'salon at home' products have gained popularity, with Olaplex becoming the most-purchased beauty brand during lockdown. We can expect to see enjoyable wellness permeate further into the haircare industry, with essential oils and hair infusions aiding relaxation from head to toe.

'Skin-tech' has also been a huge trend, with consumers investing big money in new innovations such as LED light therapy face masks and micro-current devices. Japanese brand Shiseido even offers a bespoke system using an algorithm to analyse day-to-day factors that may impact a user's skin including weather, environment, sleep and hormones – they then provide a targeted two-step skincare regime selected from 80,000 possible patterns.

If we take something positive away from this pandemic, it should be the benefits of self-care: with brands entering the connected wellness space and enabling us to take a set moment each day to cleanse the body and mind. >>>


Emma Freeman

Senior Account Director - IHQ UK

➤ **HOUSEHOLD MAINTENANCE**

The best of both worlds

With many of us spending more time at home during lockdown, trying to create a safe environment for our families and housemates, we are seeing a shift in household cleaning (HHC) brand messaging. Many are now no longer simply focussing on efficacy, but coupling this with a more natural ingredient story delivering both effectiveness and safety.

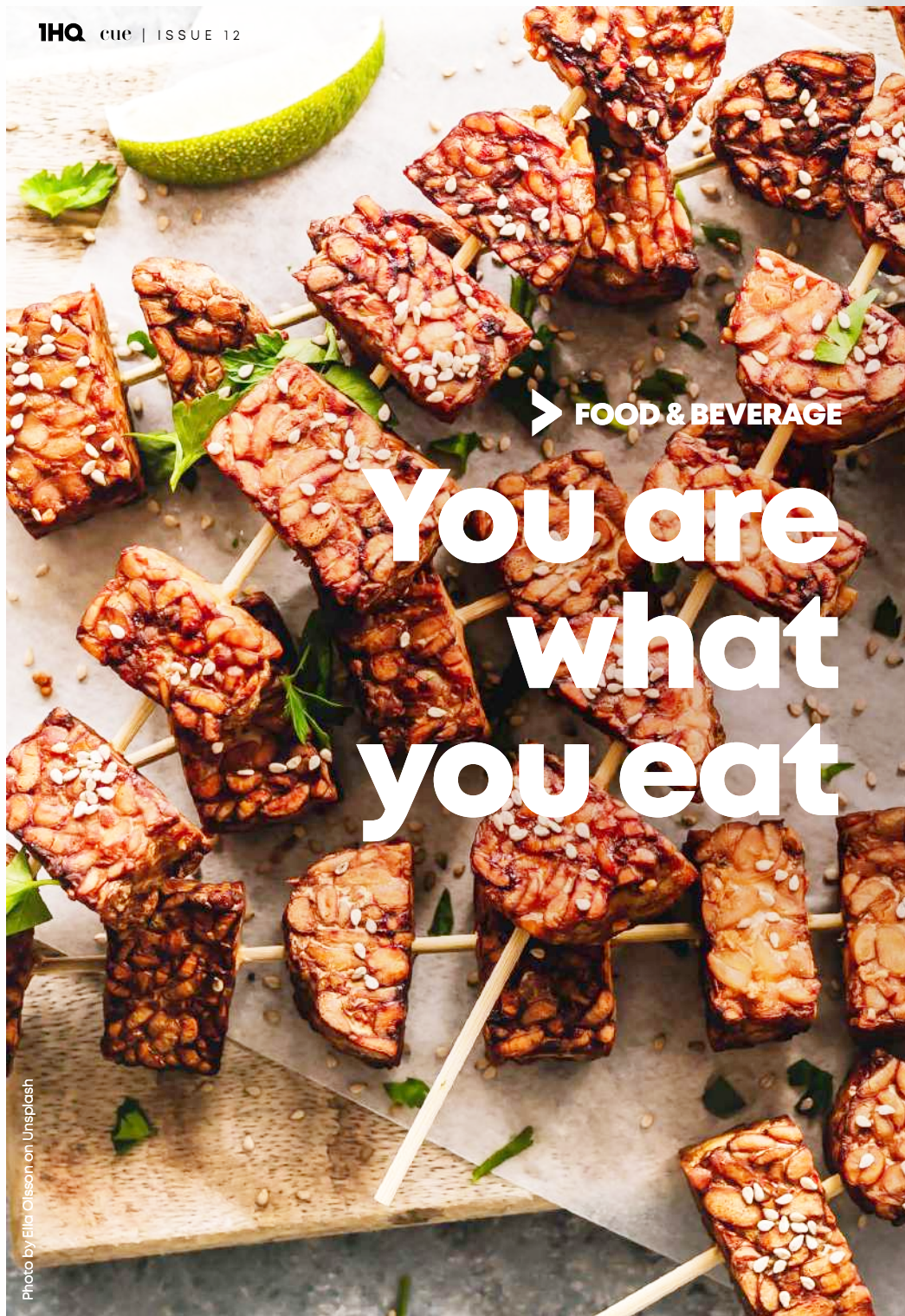
Consumers aren't simply focussed on the task at hand but are thinking holistically about the products they buy and their impact on the world, both their world and the impact on the wider environment.

All brands now have a duty to think about their use of single-use plastic. The introduction of post-consumer recycled (PCR) plastic, clear recycling and carbon neutral roadmap communications are expected by many.

There is also a growing trend for more plant-based products containing ingredients famed for their natural cleaning properties. We've seen brands within HHC take learnings from personal care brands, introducing products with baking soda and vinegar.

I think we will start to see the introduction of live 'good' bacteria; similar to innovations in food and drink with products like kefir and kombucha, used in HHC over the next 3-5 years, naturally lifting dirt.

I anticipate a shift to more premium fragrances, with ingredients renowned for their relaxing or energising properties as consumers look to brands to create more of a connective holistic wellness approach. Method have focussed their brand positioning on fragrance cues to add joy to the cleaning experience (anyone who has used the rhubarb variant will I'm sure agree). Could we see a stretch into home fragrance for some of their best-selling SKU's? >>>



> **FOOD & BEVERAGE**

You are what you eat

Photo by Ella Olsson on Unsplash



Betsy Bebbington

Account Director - 1HQ SG

'You are what you eat' has taken on a whole new meaning. Going beyond consumers wanting natural and organic products, your choice of foods now reflects your lifestyle choices. We have seen a systemic shift in consumers' food and beverage choices, whether this be from a humanitarian climate change movement, health management or holistic wellbeing.

Natural disasters repeatedly confirm the impact of climate change; we've already used more resources than can be regenerated and food is 26% of humanity's ecological footprint. With recent Netflix documentaries such as 'Cowspiracy' and 'Game Changer', there is growing awareness that society must respect and work in collaboration with nature. Developing from this we see a rise in veganism and also commercial brands such as Impossible Foods who, with their impossible burgers, claim to use 95% less land, 74% less water and emit approx. 87% less greenhouse gases compared to the standard production of a beef burger. And for those who can't imagine a world without meat, Eat's R&D centre in Singapore are using innovation and science to reduce the impact of climate change; receiving the world's first-ever government approval to sell lab-grown chicken meat.

In the health management space, micro-hacking and biohacking has become common practice to track and manage health on a day-to-day basis. With new technology and information to help expose any underlying medical conditions using gene-based health

screenings, consumers now have more control over how they prevent and restore their optimum health. So how can the food and drinks landscape respond and innovate? We are already seeing brands building natural therapies into their food and drinks mix. And perhaps this will call for a much more advanced GDA system for food and beverage brands in the future too?

'Self-care' is a key concept when considering health and not exclusive to the yoga mats and self-care Sundays, but a reflection of the holistic way health is viewed. Emergent opportunities identify the interconnectedness of physical health and mental health. Angeline Leong, co-founder of Angie's Tempeh, discovered this connected health when she changed her lifestyle by turning to clean and wholesome eating. She learnt the authentic way of tempeh making from tempeh masters and now delivers her source of positivity to customers ranging from kids and yogis to vegetarians and cancer survivors, with the brand forming a community of wholesome eating.

Health is now viewed holistically, rather than only for definitive reasons such as to lose weight. The Food and Beverage sector will be adapting to the changing needs of the consumer on both a global stage for climate change and also at an individual level to meet our physical and mental health needs. Developments that improve wellbeing are no longer fads, but new ways to change lifestyles sustainably and positively. >>>



Hillary Hoch

Account Director - 1HQ US

➤ **HOSPITALITY**

Keep on track whilst travelling

Are you 'on track' or 'off track' with your health and wellness goals when traveling? Personally, I can fall 'off track' but with recent trends emerging in the health and wellness space, I can't wait to travel again as we see Spas and Hotels worldwide offer new experience to ease our anxiety and covid stresses.

Gurney's Montauk Resort & SeaWater Spa in Montauk, Long Island New York offers high end "Wellness Retreats" with a fitness-focused program each month, giving hotel guests the opportunity to stick to their routine with wellness top of mind. The offering includes curated weekends away with sought after NYC boutique fitness studio classes and workshops. Not forgetting wellness-inspired smoothies and group dinners with healthy dish options – all aimed at reducing anxiety and stress.

Hotels are also becoming more elaborate, with in-room workout gear tapping into fitness with cult followings. Gone are the days of just requesting a room with a view, now guests at Westin Hotels and Resorts worldwide can request a 'Westin WORKOUT Peloton guest room.' Guests can experience their routine in-home workout whilst travelling, keeping their daily fitness fix on track.

With guests expecting hotels to accommodate many different lifestyles and dietary needs, 1 Hotels have teamed up with Hannah Bronfman, a beauty and wellness expert and founder of HBFIT, to reinvent the minibar experience. The collection is exclusively available at the 1 Hotel West Hollywood location and offers a selection of locally sourced

products for the hotel's first ever wellness-conscious minibars. Guests can choose from "The Early Bird Special", "The Glow Getter" or "The Wind Down". Each minibar offers a curated range of products, highlighting added benefits and feel-good ingredients.

Since Covid-19 and the increase of WFH, guests have chosen to discover a more picturesque view than their bedroom wall. The Hyatt hotel brand has re-imagined the guestroom layout, subdividing rooms into different zones for sleeping, working and relaxing. They have also included blackout shades and warm lighting to help improve sleep quality.

Hotels are also adding music therapy to their offering, as research uncovers the benefits of sound experiences during stressful times. Hyatt Hotels have partnered with Headspace, a digital meditation and mindfulness tool that walks users through guided meditations, helping guests to prioritize their own wellbeing during and between their stays. Headspace has also partnered with many Airlines, beginning way back in 2011 with Virgin Atlantic and then expanding this offering across an additional 12 airlines.

After a year in lockdown, it has motivated many to be even more proactive and self-motivated in finding new forms of self-care, fitness and nutrition. Hospitality brands continue to evolve and dial-up their offerings. With Health and Wellness at the top of brands minds, keeping 'on track' can be easier than ever in this ever evolving exciting space. **A**

What's going on?

Stay inspired and up to date

LONDON
NEW YORK
AMSTERDAM
SINGAPORE

Photo by Vadim Kaipov on Unsplash

LONDON

01 **Box & sprout**

boxandsprout.com

Founders Charlie Chappatte and Rob Ford are on a mission to help urban residents reconnect with nature whilst creating greener homes and streets. Growing an online community of indoor gardeners, Box and Sprout offer a monthly plant project subscription service, including video tutorials and workshops to help customers nurture their vegetables, herbs and houseplants. As a 100% carbon neutral business, everything they sell is recyclable, recycled and sustainable.

02 **Brutal Beauty**

Barbican Centre, Silk St, London, EC2Y 8DS
May – August 2021

French artist Jean Dubuffet once voiced that 'art should always make you laugh a little and fear a little. Anything but bore'. This exhibition champions Dubuffet's rebellious philosophy, going against conventional ideas of beauty, capturing the poetry of everyday life in a gritty and authentic way. There will be over 150 works on display, from giant colourful canvases and early portraits to fantastical statues and enamel paintings. Amongst these, will be 18 rarely seen pieces from Dubuffet's collection of Art Brut (raw art).

NEW YORK

03 **Geometric Properties**

Artechouse NYC, 439 W 15th St, New York, NY 10011
March – September 2021

Julius Horsthuis, Dutch visual and fractal artist, has created an immersive audio-visual journey through fractal dimensions. Visitors are taken on an exploration through the past and Horsthuis' ideal future, a reimagined world showcasing the beauty of mathematics, nature and architecture coinciding. Through the creative digital expression of endless iterations, this exhibition explores fundamental mathematical patterns to inspire introspection and awe.

04 **Arrivals + Departures**

Brooklyn Borough Hall, 209 Joralemon St, Brooklyn, NY 11201
arrivalsanddepartures.net

This unique art installation played out across traditional train station arrivals and departures boards, honours both those who have been born and those we've lost. Set up by the Brooklyn Academy of Music (BAM) and UK-based social practice artist YARA+DAVINA, the boards are public-driven, constantly displaying different names submitted online. In an effort to explore issues around birth, life, death, loss and collective grief, the boards feature a rotating roster of names. >>>

AMSTERDAM

05 DADU films.dance

Set in a little Dutch village called Spaarnewoude, DADU is a captivating short film shot by the incredible cinematographer Sam du Pon. The performance, directed by Ian Robins and rhythmically framed by composer Awir Leon, throws the viewer into the ecstatic worlds of four dancers. An exploration of their individuality and relationships with each other and the spaces between them, this is a mesmerising four minutes of pure dance, teleporting audiences to new places and different spirits.

06 In De Maak Various locations 26 March – 6th June 2021

Spread across all seven Bijenkorf stores, starting in Eindhoven and ending in Amsterdam, this initiative from 'Room On The Roof', Bijenkorf's own 'Artist in Residence' department, promotes inclusivity, body positivity and sustainability. With input from art historian Inge Raadgever, the exhibition highlights how revealing fashion can be about certain periods in time. The chosen artists have been building their work in store windows, demonstrating a realistic impression of how much time goes into the production of a single garment.

SINGAPORE

07 Bollywood Veggies 100 Neo Tiew Rd (Kranji), Singapore 719026

Set in the rustic environment of the northwest Kranji countryside, visiting Bollywood Veggies is like taking a step back in time. The location offers an opportunity to rejuvenate your senses, connect with family and friends and enjoy the simple pleasures of real food. The on-site Poison Ivy bistro takes farm-to-table food back down to earth with its wholesome and hearty cooking style, whilst the Bollywood Bhanchha (Kitchen) brings fresh produce alive in intimate luncheons or culinary classes, with ingredients foraged from the 10-acre farm.

08 Picturing the Pandemic National Museum of Singapore, 93 Stamford Rd, Singapore 178897 February - August 2021

A visual record of Covid-19 in Singapore documents contemporary events and developments through a showcase of artefacts and stories from everyday Singaporeans. Five local photographers – Bob Lee, Brian Teo, Edwin Koo, How Hwee Young and Zakaria Zainal – and two filmmakers – Adar Ng and Dave Lim – have been commissioned to explore five themes: A Day in the Life, Essential Workers, New Ways of Living, Making Visible, and The Spaces Between Us. The exhibition paints a poignant and resonate portrait of a nation responding to, and coping with, a global crisis. Want to be a part of history? The museum is extending a public call for entries until June 30. [a](#)



WELL, hello!



Ian Watts

Associate Creative Director - 1HQ UK

How to use the wellness creative palette in your brand design.

Wellness is a trend that we have had to sit up and take notice of - it is a shift that is here to stay. And it's been noted that when it comes to buying into 'wellness brands' the consumer takes more time to make those purchasing decisions.

I am completely consumed by the wellness world or more holistically, wellbeing. At night, after listening to headspace, popping a magnesium tablet, I squeeze in my earplugs to drown out my own snoring, hunker down on the memory foam mattress and fall to sleep, not before a quick wave of my arm to trick my Fitbit into thinking I've completed 10,000 steps. And this is just a 5-minute snapshot of my day! My 'wellness journey' is taking over and I'm not alone.

An increasing number of us are in a never-ending cycle of self-improvement; with brands finding new ways to increase our overall 'wellbeing' at different points in our week. Millennials, more than anyone, are increasingly seeking new opportunities to improve their physical and mental health, so it's no surprise that the overall 'self-improvement' industry generates over \$10 billion a year globally. From waking up to your daily juice subscription, downing your shot

of Fairtrade compostable coffee right through to cooking your organic vegan recipe box in the evening... with every step, glass of water and calorie being tracked throughout the day; there is something (or all of it) for everyone.

As the market becomes more saturated across categories, the role of design becomes increasingly important. Having to disrupt the category, deliver a clear (and better) benefit than competitors, as well as engaging with the consumer on levels beyond the point of sale. Gone are the days of thinking you are making a healthier choice just because the product has a faux brown paper texture and distressed type.

The wellness creative palette is diverse and therefore design becomes a bit of a balancing act. Historically the creative principles are similar to that of a bank: a trustworthy, authoritative and uncomplicated aesthetic. But now almost anything goes, I mean who would have guessed some quirky little characters would help Headspace demystify the practise of meditating. Wait for it... the app has been loaded 62 million times in 190 countries. >>>



To enter the wellness space and play across multiple platforms, you need to choose your positioning and brand accordingly AND of course you will need to be sustainable, have a great brand purpose, with any claims supported and backed by professionals.

When looking at the wellness space across categories, it is clear that design needs to take one of THREE main territories and you need to be very single-minded about whichever you choose for your brand:

01

Headline Claims

This is fitting for brands who have functional added benefit or preventative offerings; those who can improve health by highlighting the 'WHAT' rather than the 'WHY'. Executed correctly, this kind of headline can feel reassuring and efficacious, particularly in more traditional categories where a bold claim can be seen as disruptive e.g., a yoghurt which lowers cholesterol.

02

Less is More

A simplified aesthetic gives the impression of honesty and simplicity. A careful balance of the WHAT and the WHY. Often born from the more functional space or direct-to-consumer models but given a more approachable and potentially stylish aesthetic.

03

Real Character

Whether it be driven by the founders or a bold tone of voice, this approach allows a brand to live within the emergent end of the spectrum. Disrupting the discourse with a more emotional and evocative voice, this territory is one that fits really well beyond the purchasing opportunity, e.g. founder-led brands being able to literally talk to their audience on social media platforms.

Consistent delivery of your brand and wellness message is what people will remember. But consistency shouldn't mean repetition. Founders need to make sure the brand is flexible enough to evolve with us. Challenger brands will now often have their first consumer interaction 'in motion'; sometimes branding has to live on a piece of packaging but those elements which create the design began life through animations or stop motion, living and breathing in an online world. A lesson that breathing life into your brand is more relevant than ever when part of this category. Static just won't cut it. In the offline world this means that by the time

a product arrives on your doorstep (and you're photographed retrieving it in with your dressing gown at midday) the product has been imbued with a much richer meaning.

There are huge opportunities across the wellness and holistic wellbeing space; ones that allow us to make our bodies and the world a better place to live. Consumers entering the wellness space want to feel good about their purchasing decisions, so if brands can help us make better decisions more often, then we all stand a chance of improving our own personal 'wellness journeys'. **Q**

Digital health ecosystems

The new golden opportunity.



Tom Wrigley

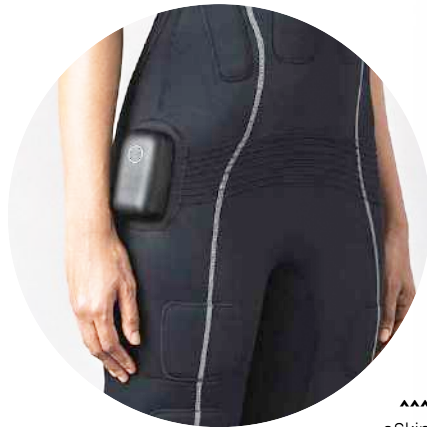
Digital & Social Communications Strategy Director - IHQ UK

Technology's influence over health and wellness is nothing new. From Galileo's invention of the first rudimentary thermometers, to the connected trackers we see today, technology and health have been interlinked throughout history. But as the health and wellness market becomes saturated with apps, devices, wearables and trackers, a new opportunity has emerged – how best to utilise the wealth of data this provides.

Successful brands will be those who help consumers navigate this data deluge and connect disparate singular data-streams into a holistic connected approach. By making data relevant, personal and actionable, and understanding the role they play within connected health systems, brands can deepen their connection with consumers and drive further growth. >>>

The surge in online wellness

The digital health market is booming – in the next 6 years, it's expected to increase by 6x to nearly \$640 billion USD globally (Statista¹). This year's Consumer Electronics Show (CES) was awash with wearables, apps and devices that deliver medical-grade technology into the palm of consumers' hands. Among some of the top exhibits included Xenoma's eSkin which incorporates health-tracking technology into clothing, Digitsole – footwear that measures gait, balance and predicts early onset of neurodegenerative conditions like Alzheimer's Disease, a tidal wave of trackers including the Withings ScanWatch which boasts a medical-grade ECG, and a surge of sleep tech.



AAA

eSkin

Photo courtesy of Xenoma



AAA

Steel HR

Photo courtesy of Withings

Of course, it doesn't stop at wearables or apps. Health tech has made its way throughout our homes and devices, from connected exercise equipment, to smart fridges, which monitor our food levels, track nutrition data and provide healthy meal prep recommendations.

The market is saturated with new health-tech, which is becoming increasingly powerful, tracking our every move, calorie and heartbeat. And with this comes the real opportunity for brands and healthcare providers – utilising the data.

The informed patient

Patients are arriving to their healthcare provider with more information than ever before. By placing health-tech in the hands of consumers, we've moved beyond Doctor Google and into the realms of tech-enabled monitoring, prevention and diagnosis, before we've even reached our GP. This wealth of data has the power to transform the healthcare industry, but it also poses the risk that patients may bypass their healthcare provider altogether.

With the rise of the informed patient comes the rise in choice of treatment options. More data means more choice, and from a consumer's perspective, the

healthcare professional may no longer know best. This provides both a threat and a golden opportunity for healthcare providers. The golden opportunity lies in learning from the tech disruptors and connecting the multiple data streams into one holistic ecosystem, re-imagining the patient experience in a way that focuses on adding meaningful value to people's lives. The question is who will get there first... healthcare providers or big tech. >>>

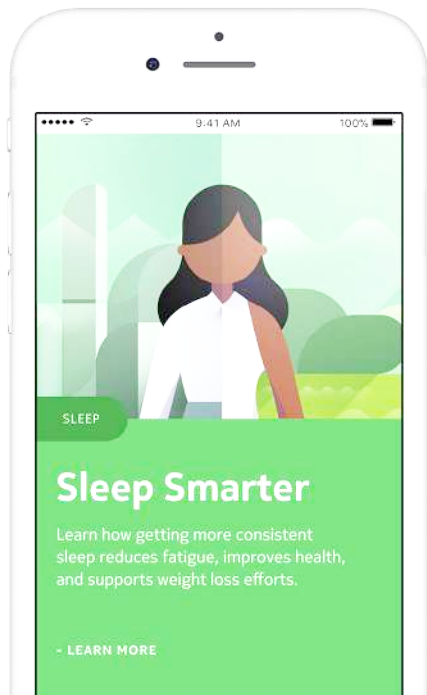


Image courtesy of Withings



Photo by Negative Space on Pexels

¹ [statista.com/statistics/1092869/global-digital-health-market-size-forecast/](https://www.statista.com/statistics/1092869/global-digital-health-market-size-forecast/)

Connected health ecosystems

Connected digital ecosystems have long been the desire of digital strategists and brands alike. Connectedness is about combining multiple data sets into something more personal, and ultimately useful, to a customer. The finance sector has made big leaps in this sector – think of ClearScore's integrated credit scoring reports, which take multiple data sources and combine them into one easy-to-read personal report. Or the launch of Open Banking, allowing consumers to combine their financial data to find new ways to make the most of their money. This approach will revolutionise healthcare.

Digital health ecosystems were the fastest growing segment of CES, as brands, big tech and healthcare providers compete to be the go-to destination for health and wellbeing, by turning multiple data sources into holistic actionable plans. And whilst healthcare data comes with the obvious complexities of privacy and security, we know that 83% of consumers are willing to share their data for more personalised experiences (Accenture²).

The big players have already moved into this field and will continue to do so – Google's acquisition of Fitbit leads to interesting opportunities for its Google Health division, whilst Alibaba's partnership with the Merck Group demonstrates how the big retailers are making moves into the field of personalised medicine products.

Whether delivered by a healthcare provider, or by big tech, connected health ecosystems will play a huge part in consumers' lives going forwards, taking multiple streams of data and providing personally relevant recommendations for their users. And with these recommendations comes immense influence over what we do, what we buy, and what we consume. So, what might this mean for brands?

Brands must forge a role within wellness

Digital health ecosystems will be one of the biggest disruptors to the consumer purchase journey. To get a glimpse of where this is heading, look no further than DNANudge, which combines DNA testing and personalised nutritional information to 'nudge' users to make healthier shopping decisions while shopping for groceries. The power this will have over shopping behaviours is something

most advertisers could only dream of. As connected health ecosystems draw on additional data sources, these recommendations will become increasingly personalised, powerful, and influential.

So, where do brands go from here? It's vital for brands to carve out a role for themselves within holistic wellness, by understanding their positioning, the role they play, and the partners they need to deliver this. A great example comes from Nestlé's collaboration with the With/n app, in a move that takes the brand beyond product and into wider nutritional health. The health-focussed app connects multiple data sources to provide personalised recommendation and plans, allowing Nestlé to have a deeper relationship

and more meaningful connection with its customers. The growth opportunities this presents are huge – as households become increasingly connected to these ecosystems, so too do opportunities for cross-sell, increasing average basket-size and driving loyalty.

The surge in digital health tech has led to more information, more data, more devices, and ultimately more noise. We know the golden opportunity lies in harnessing this data into a holistic and personally relevant health ecosystem, but the question remains of who will get there first out of the traditional healthcare companies, big tech and retailers. Those who do, will have the biggest influence over purchasing decisions in decades. Brands who get it right might just find themselves nudged into the baskets and lives of their consumers in more meaningful ways. **Q**

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² [accenture.com/_acnmedia/PDF-77/Accenture-Pulse-Survey.pdf](https://www.accenture.com/_acnmedia/PDF-77/Accenture-Pulse-Survey.pdf)

Leveraging brand 'halos'

How the Food & Beverage conversation is changing.



Scarlett Irons

Junior Strategist - 1HQ UK

Call it people power. Or maybe just clever branding. But the wellness industry is exponentially growing, creating a lucrative opportunity for businesses. The global wellness economy is now so pervasive that 73% of global consumers consider wellness an essential element of a brand's strategy,¹ showing that health can quite literally become wealth.

For brands to successfully capitalise on this they must differentiate, and to differentiate they must first understand the change in conversation. When it comes to wellbeing, in the past brands have talked about problem solving benefits, but with the rise of DNA testing and personalised offerings, we are seeing a shift towards preventative health and maintaining wellbeing.

Whilst this shift has already occurred within the supplement market, we predict the Food & Beverage category will see a rise in brands positioning their product within the preventative and holistic wellbeing space.

Consumer's expectations have shifted, they now want more from their food and drink purchases. In the already saturated category, consumers are making more considered purchases, looking for delicious food which is good for their mind, body and soul, from brands with a 'purpose'. The brands who stay top of mind are those who clearly manage to deliver proven and measurable tangible end benefits, which improve the lives of consumers and that of the wider society, without just green washing. Easier said than done I hear you say. >>>

¹ D Ford; PR Newswire

At IHQ we refer to these tangible end benefits as 'halos'. Many brands get caught up in communicating the 'shadows' that they are fixing, for example how sustainable their packaging is. From the perspective of a consumer, when brands do this, they are merely fixing a wrong which needed to be made right, so in this case, minimising their pollution on the planet which doesn't actually add any additional value to their proposition.

This is also the case with the personal end benefit of a product where brands communicate the 'shadow' they have fixed, such as 'no added sugar', when this is merely keeping up with the rest of the category and fixing an existing issue. It will be the brands that find their additional personal benefits within the

holistic wellbeing space, such as gut health or mental wellbeing, and/or benefit society, that will have the power to drive change. But it must be a tangible, evidenced deliverable, as consumers are increasingly becoming cynical and savvy to purpose-washing.

A brand effectively communicating its 'halo', responding to the demand for tangible benefits, is Dash water. Their proposition of a flavoursome, zero calorie and low sugar fizzy drink, initially appears to only be fixing the 'hidden sugar shadow' of the soft drinks category, however their promise that they are 'reducing food waste by accepting misfit fruit,' appeals to both the health and society benefit need that consumers are looking for.

Meal kit brands such as 'The Mindful Chef' have also created a valuable proposition by offering a connected wellness experience through their healthy 'cook at home' boxes. These kits have helped inspire positivity, encouraging families to cook together through the use of 'family friendly' recipes and instructions, whilst retaining their core health offering. It is brands like these, with multi-faceted propositions, that are appealing to the hearts and health of consumers.

The other challenge that brands must consider is the ability to create effective communications in order to cut through the saturated food and beverage category. This is best done through the subconscious. The psychology behind this explains that humans respond best when messages communicate with the parts of their brain that control emotions, behaviour and decision making. This is crucial when 95% of our purchase decision making takes place in the subconscious².

This isn't new information for us marketers but it's becoming increasingly crucial for brands to leverage, in order to cut through the category and communicate their reason to exist. We help organisations to understand the semiotics of all of their visual and verbal brand communications, at every touchpoint in order to effectively communicate their benefits to that system 1 subconscious part of the brain. **Q**

Top 5



Photo by Anna Shvets on Pexels

Wellness brands to watch

01 Ritual

A brand built on transparency; Ritual is reimagining the multivitamin. Founder Katerina Schneider believes that better health begins with better ingredients and set out to develop simple, effective capsules, backed by science. Cleverly formulated to combine multiple ingredients, Ritual's capsules are designed to be slow releasing, helping to fix nutrient gaps, improve blood and organ health and bone integrity. Ritual now produces a range of multivitamins for Women, Men, Teens and Kids, all with traceable ingredients and a visible supply chain.

02 Lumen

Lumen is the world's first hand-held, portable device to accurately measure metabolism. Using a sensor and flow meter to determine the CO2 concentration in a single breath, Lumen knows if your body is using fats or carbs for fuel. Providing personalised nutrition recommendations and daily guidance on sleep, diet and exercise, Lumen can help users improve metabolic flexibility and support fat burn.

03 Golde

Golde was founded by entrepreneur Trinity Mouzon Wofford, the youngest Black woman to launch a brand in US beauty and wellness retailer Sephora. With a plan to strip away concepts around wellness that tend to involve guilt, Trinity's mission was to create an accessible, inclusive and fun brand. From Papaya face masks, to turmeric latte blends, Golde products are a celebration of superfoods, created to fit seamlessly into your lifestyle, not the other way around.

04 Mirror

Fitness and lifestyle company Lululemon has acquired Mirror, helping to strengthen their community as at-home workouts become the norm. The nearly invisible home gym, that elegantly fits seamlessly into any room, uses algorithms to track results and build personalised programmes. Users can join other Mirror Members for live or on-demand classes including cardio, yoga and boxing, with real-time feedback and personal shout-outs to keep motivation high.

05 The Route

Sleep care is the new self-care with both brands and consumers tuning into the connection between sleep and immune health. The Route, co-founded by registered nurse, Nancy Pellegrino, is a skin care brand striving to make medical grade topicals both luxe and accessible. Their products use the power of the body's circadian clock to target the delivery of ingredients at times your skin will use it best. **a**

Building brilliant brands One Hard Question at a time.

LONDON NEW YORK AMSTERDAM SINGAPORE

WANT TO WORK WITH 1HQ?

david.collyer@1hqglobal.com
+44 (0)1753 624242

MEDIA RELATIONS

media@1hqglobal.com
+44 (0)1753 624242

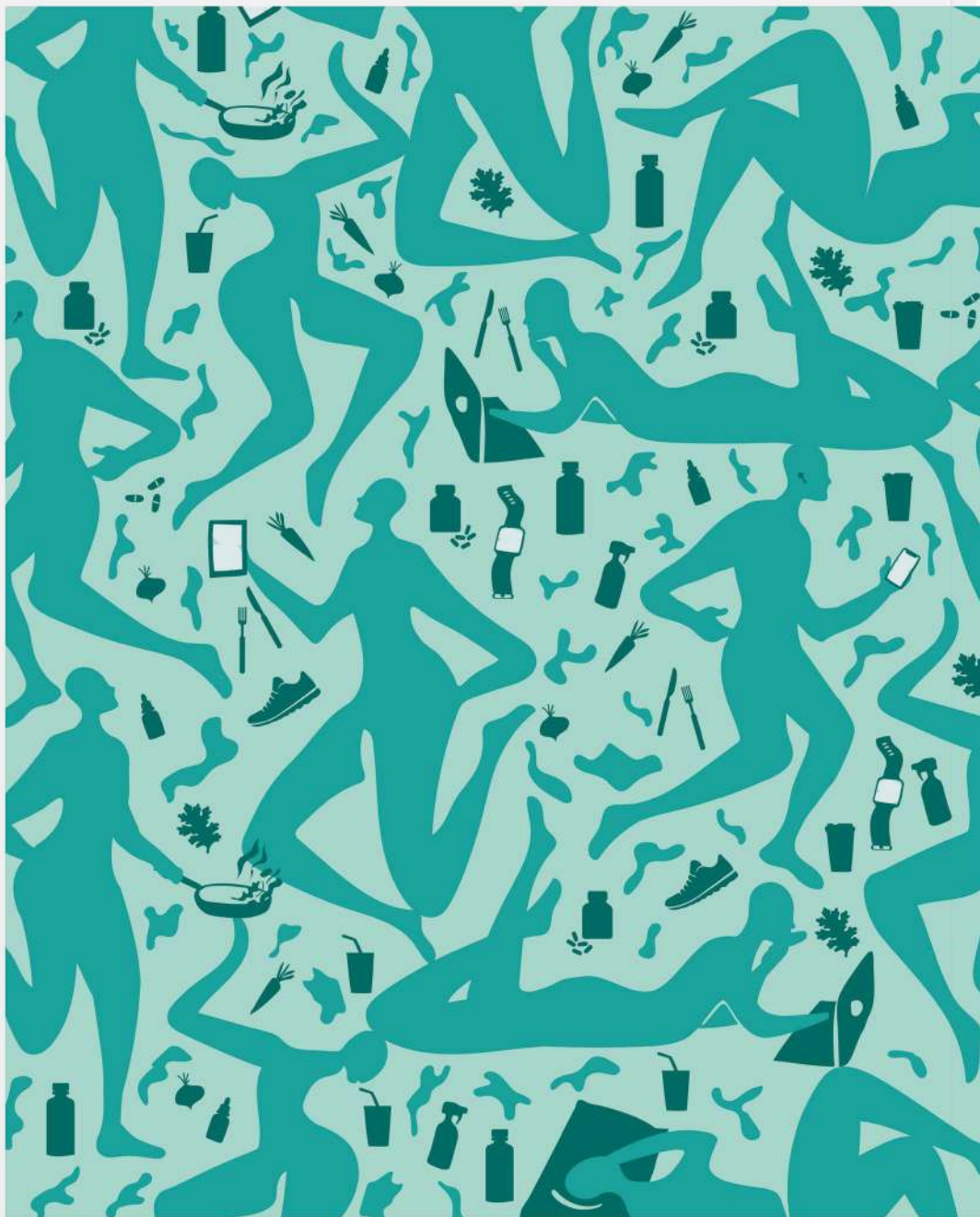
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