

Do-it-yourself wellness

By Dan Edwards

The US has wellness on the agenda. The market opportunity is diverse, from eating programmes promising weight loss (Nutrisystem), iontophoretic paper which rejuvenates your skin (PowerCosmetics), to brushes that monitor how thoroughly you clean your teeth (Oral B). The consumer products and medical industries are making a bid for a slice of what is forecast to be a \$1tr market within the next few generations of product development.

Nevertheless, there are many aspects of this market that make it tough to develop products and services for. It occupies a space between the consumer and medical industries, and the tools needed to tackle this market are often missing from the companies seeking their fortune here. Both industries are struggling to successfully decode the magic wellness formula and access the cash. Sagentia supports many US clients in defining both opportunity and product offerings for this market.

Wellness is distinct from traditional healthcare. It is a consumer-driven phenomenon borne of aspiration and disposable income, and initially championed by a baby boomer generation ill-content with what the market had to offer, though the spill over certainly now affects other generations.

The notion of consumer self direction is key; the focus of any product or service is consumer aspiration, not an illness. Moreover, it is likely we are dealing with a preventative, not curative intervention with the consumer. Consequently, we are moving well upstream of traditional healthcare.

The likelihood is that the professional (MD or nurse) has little involvement in the process of selection, use or impact monitoring of a wellness product. Consider the

usage-monitoring toothbrush – at no point during purchase nor use is a professional present. And yet we are seeking to deliver efficacy and monitoring in the subtle bio-chemistry of the mouth.

Here consumer companies struggle with delivering real efficacy, whilst medical companies must understand consumers' need for instant gratification in order to believe in a product. Consequently diagnosis – in lieu of a professional – is turning out to have a big role to play in the development of any wellness proposition.

Another 'rule of thumb' for clients tackling this promising market is that the opportunities we explore together are multi-faceted. No longer can we focus on a single technology bullet to define a new product, such as a magic food ingredient or a revolutionary method to deliver chemicals through the skin. Instead we must bundle any consumer proposition with a diagnostic to demonstrate efficacy, and provide the instant gratification that is so important to consumers. A service component, designed to support behavioural change with the consumer (often including education) completes the bundle.

A good example of a bundled solution is the weight loss/management programmes like Nutrisystem. The product is a low calorie and nutritionally

supplemented menu; the diagnostic is a monitoring regime that appeals to the obsessive-compulsive mind; and the service is a one-on-one counselling programme available to support and encourage participants.

Whether we are dealing with heart health, mental alertness, sexual dysfunction or skin beauty, we stand a greater chance of success if we launch a brand that addresses the subtleties of physiological intervention and demands of consumer emotion.

The wellness market is exciting for medical and consumer products companies. However it is an immature market and industry leaders have yet to establish themselves. We are supporting our clients by bridging the gap between the consumer and medical domains, and we continue to conduct our own research on the particular needs of this market.

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