

WOMEN, WELLNESS & TECHNOLOGY



3 Key Insights from SSW Inspire New Opportunities for Well-Tech

By 2018, an incredible 3.6 billion people will have access to the internet,¹ and many will gain access from mobile and wearable devices.² According to Rock Health's 2015 Digital Health Funding report, the healthcare consumer engagement and personal health tools and tracking categories were their fastest-growing categories in 2015, up 222% year-over-year, and accounted for 23% of overall funding.³ The opportunities this rapid category adoption poses for both consumers and brands are exciting to say the least.

In early 2014, however, we noticed that women lagged behind men as early adopters of wearable technology. While sales have since reached gender parity, the initial gap sparked a hypothesis: **The wearable technologies currently on the market don't yet meet the broad range of women's needs when it comes to wellness.**

As advocates and specialists in women's health, the engagement strategy team at SSW led a multi-phased research project to understand not just how women use wellness technology, but also how they perceive wellness and set wellness goals for themselves. We connected with close to 200 women across a range of demographic and geographic backgrounds between August 2014 and May 2015. See page 7 for full methodology.

Our research uncovered a dichotomy between what women ask of tech and its potential, driven by how women perceive wellness, the central role of social relationships in their well-being, and their emotional relationship with technology. These findings not only validate our hypothesis, but also more importantly indicate that women won't be the ones asking for their needs to be met. It's up to the industry to design what women can't yet imagine and convince them of the positive impact new types of well-tech could have beyond simple tracking.

Conclusions from our key findings into 3 categories:

1. Defining wellness and setting goals
2. The integral role of social relationships
3. The well-tech dichotomy

1) Defining wellness and setting goals: Health is black and white; wellness is gray.

A crucial precursor to understanding the role of tech in women's wellness was understanding how they defined wellness, wellness activities and the benefits of those activities. **Overwhelmingly, our study participants told us wellness is a balance of the physical, mental and emotional.**

As illustrated in the charts on the next page, women participate in a variety of wellness activities and acknowledge the interrelated benefits of these activities. While physical health indexed highest as one of the most important benefits of wellness activities, mental health and emotional health followed closely behind. (See Methodology section on page 7 for details). 40% of women ranked "spending time w/ family & friends" in their top 3 wellness activities. Women's holistic wellness perspective is reflected across their range of activities and the benefits of those activities.

In contrast, our respondents had a much more straightforward interpretation of health. Health pertains to physical activities informed by discrete, biological markers. Health is a yes or no diagnosis; an increase or decrease in blood pressure; the calorie counts on a new diet. **Wellness measures, on the other**



Women know exercise, eating, and sleeping well have mental and emotional benefits.

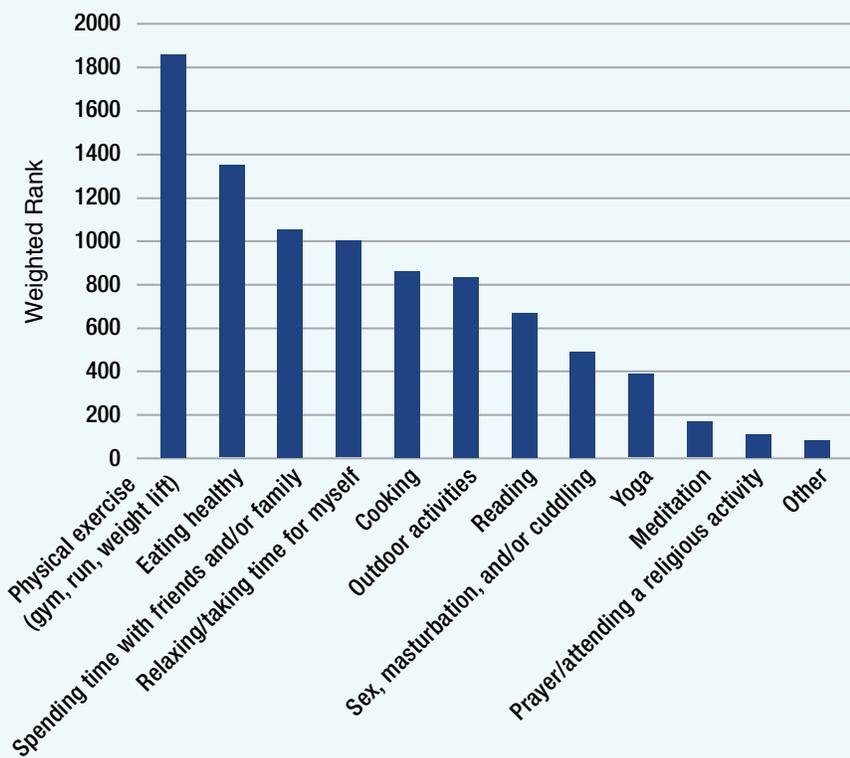


While women consider health indicators—weight, blood pressure, etc—they have a more difficult time knowing what will keep them well.

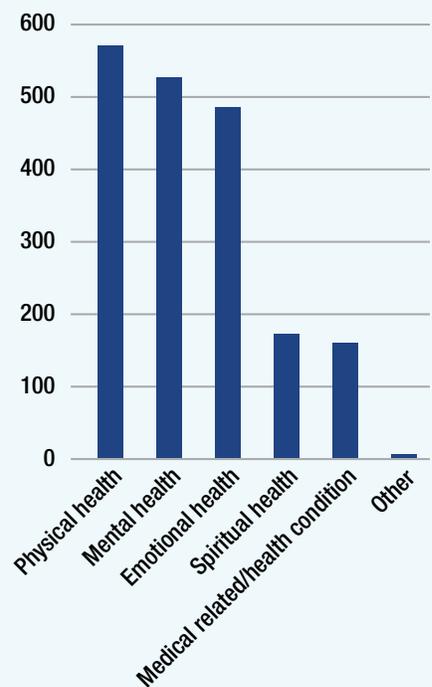


When defining their own wellness, women found intuitive feelings of balance, stability, and control more important.

What do you do to maintain or improve yourself on a regular basis?



What are the most important benefits of these activities?



hand, are ambiguous and subjective. Instead of “healthy numbers,” women rely on intuitive feelings of balance, stability and control to indicate wellness.

“... You can get a diagnosis like psoriasis or high blood pressure and things like that but it’s the steps that you take to make you feel good about it. . . you might still have that diagnosis but it’s how you approach it and how you react. That’s going to give you wellness in your inner center.” (Age 68)

These perceptual differences contribute to a **disconnect women have between maintaining their overall wellness and treating specific medical conditions**. Only 12% of respondents ranked medical reasons as a benefit of wellness-related activities, placing them a significant 64% below emotional benefits. To that end, we learned that women who considered themselves clinically healthy may not feel well, and the reverse is true: Women who are not clinically healthy, perhaps managing chronic conditions such as emphysema or arthritis, may still consider themselves well despite their medical diagnosis.

The ambiguity of wellness impedes goal setting and measurement. It’s work to define wellness and work to measure it. Women therefore are hesitant to set specific wellness goals.

“I think managing your wellness is probably a lot harder. . . **I’m not going to go and do some exercises for my sensitivity.** It’s probably harder for me to manage my emotional and mental wellness than it is for anything else, just because **there’s not, at least to my knowledge, anything that’s ‘prescribed.’**” (Age 31)

IMPLICATION The ambiguous and intuitive nature of wellness in both definition and measurement contribute to women’s hesitation to set goals for themselves.

2) The integral role of social relationships: Women are social wellness beings

As illustrated in the charts on page 2, women self-report spending time with family and friends as a common wellness-related activity. Our research uncovered just how integral these social relationships are, particularly influencing wellness information seeking and motivating changes in wellness behavior.

INFORMATION SEEKING

Our survey reveals that **more respondents across all age groups turn to friends for wellness information than their doctors.** In fact, of the 80% of respondents who seek wellness information, 1/3 report *not* seeking wellness info from their doctors, while 88% consult their peers.

This differentiation follows the distinction women make between their perceptions of health vs wellness. The women in our study indicated that they look to physicians to solve health problems based on concrete numbers, and elicit wellness advice from family and friends because they relate better to the emotional components. Our participants admit this results in an information gap for their physicians:

“ I would pick and choose [what I share with my HCP] because for me it’s really based on is [my HCP] going to be able to relate? Is she going to be able to understand? Is she going to be able to make me feel better or offer a solution? If I feel she can’t, then I won’t present [certain aspects of my social or emotional life] to her.” (Age 26)

Of the few women in our study who do seek wellness advice from their physicians, these women indicate that they have longstanding personal relationships with them. Our participants expressed desire for and gratitude when physicians initiate wellness-related conversations.



88% of women surveyed look to their friends for advice and information.



75% of respondents use the Internet for wellness information. Even though digital is a go-to source, women know they have to look critically to find info that’s credible or relevant to them.



Strong connections exist with other women whom the respondents define as credible and reliable, even if their only interactions are through social media.



33% of women who seek wellness information do not seek it from their doctors. Those who do rely on their physicians to initiate wellness-related conversations.

Reliability and perceived ability to empathize are also key indicators of credible online resources. While the Internet is the unsurprising leading source of wellness information across age groups, our participants ranked social media as their second most popular source.

For the women in our study, social media brings the benefit of human connection to media, including credibility. Women trust those who have been through similar situations or express similar interests and values on the matters of wellness. They’re prepared to hunt for credible sources amidst the inundating volume of recommendations from many mass health Web sites

Do you turn to the following people for wellness information?



Friends



Family



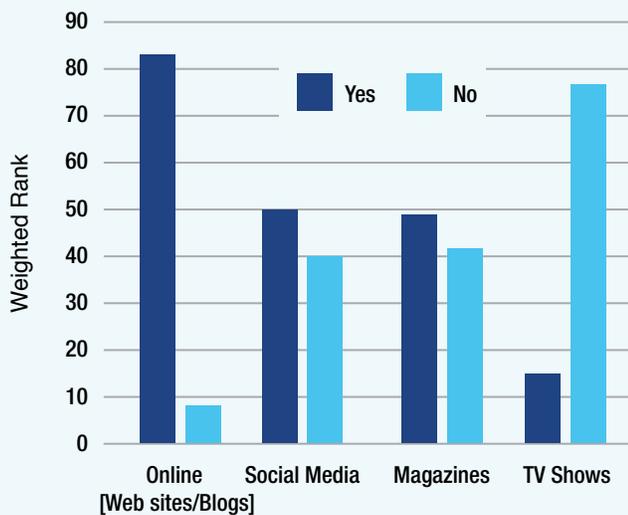
Doctor



Other

■ Yes ■ No

Wellness Information Sources



and search engine results. Familiar social connections, whether women know each other in person or not, are a welcome reprieve and often a necessary, complementary source for women when they are searching for wellness advice.

“It’s like when I cook: I’ll take in recipes and combine them and then pick up what is the best way and sample. Other times I’ll go on the Internet and look things up... I’ll call a friend who has maybe gone through some similar experience. Then just incorporate it all together to see what works for me.” (Age 68)

Credible wellness information sources are those with whom women can relate: women turn to peers more often than doctors for wellness advice; social media is a wellness information source for almost half of our research participants.

MOTIVATING WELLNESS BEHAVIOR CHANGE

Our findings also emphasize the importance of social relationships in motivating wellness behavior change for women. Our participants articulated 4 main types of motivators, and while all contained social components, the first, and what we feel is the most meaningful, is inherently social. We call it “the buddy system.”

We define “the buddy system” as women’s innate tendency to look out for, and be strongly influenced by, one another. Our research exposes 3 ways this social wiring influences wellness behavior:

Motivations for wellness behavior change fell into 4 main categories



THE BUDDY SYSTEM

Social relationships have a major impact on wellness

- Support from others helps women define and stay committed to wellness goals
- Women are motivated to stay well to be a better mother, friend, and boss
- Social connection is usually an added benefit to a commitment to staying



THE ONSET OF A HEALTH CONDITION



A MAJOR LIFE EVENT

For example, moving, divorce, or starting a new job



AGE

A shift in approach at approximately age 40

- 1) Support from others helps women define and stay committed to wellness goals

“The reason I joined ClassPass was to reengage with some friends who did it together which has been fun.” (Age 25)

- 2) Women are motivated to stay well to be a better mother, friend, and boss

“My physical well-being ties into my business well-being.” (Age 60)

“I can see the benefits in my parenting. I think I’m a much better parent [when I’m well], I’m a much better spouse, better friend. I feel better. I can deal with the recurring roles that my family puts me into. I can work better because I do the work of focusing on my wellness.” (Age 40)

- 3) Social connection is usually an added benefit to participating in that activity

“I think part of the reason I go the gym is because there are people at the gym that I get to see that I have kind of relationships with that I would not see outside of that.” (Age 31)

Competition, on the other hand, is notably absent from this list. **In fact, women shared that competing with others to reach their personal goals is more likely to be demotivating. They would much rather improve themselves to better support others.**

Women also indicated that major life events, like a job change or a move, or a marriage, divorce or new child sparked a change in their wellness behavior. Some of these life changes themselves were motivated by a desire to become more well (leaving an overly stressful job or toxic relationship). Others mentioned a medical diagnosis mandated lifestyle shifts beyond taking medication. And interestingly, we heard a number of women speak about how they noticed a shift in their approach to wellness at around the age of 40:

“ Approaching 40 was a big part of [starting therapy]... I think many people get to a certain age and you're like, 'the things that always worked for me before are not working anymore.'” (Age 40)

As seen within the wellness definitions from our survey respondents, women become more self-aware and place a higher value on maintaining their wellness as they age:



A focus on the now Ages: 25–34



The importance of emotional well-being
Ages: 35–44



Maintaining a lifestyle Ages: 45–54

IMPLICATION There are a range of influencers that inform and motivate women to make changes in their wellness behavior, but as our study shows, self-improvement is not in isolation. Social plays an integral role in the who, where, how, and why of wellness.

3) The well-tech dichotomy: Bridging the emotional and social gap

As mentioned in the introduction of this piece, we found a significant gap between women's self-reported awareness and use of well-tech that we believe is tied to an underrepresentation of social and emotional support within the technology. These central aspects to how women define wellness are opportunity areas particularly for wearables and apps.

Aesthetics are also important to the women in our study. 88% of participants indicated that design plays an important role when considering a large purchase. Design has been treated by wearable companies as the lowest hanging fruit to entice purchase. While this has spurred growth in wearable purchase, it does not provide long-term value to the wearer's well-being.

While an impressive 95% of respondents were aware of wearable devices at the time of our survey (nearly matching smartphone apps awareness), **less than 1/3 report using health-related wearable technology**, placing them as 2nd in awareness and 4th in use among the tech categories we researched.

88%

of respondents who track wellness use technology.



Phones are a source of convenience and connections. But also stress.

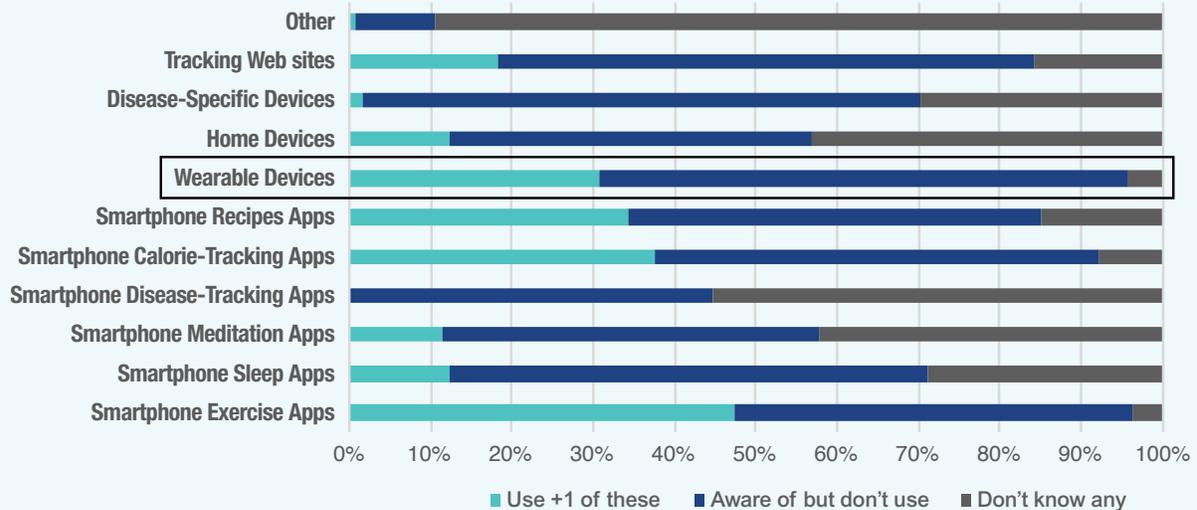


There is a wide gap between awareness and use of well-tech, especially wearables. 95% of respondents are aware of wearables, but less than 30% reported using them.



Wearables represent personal style, so design aesthetics are critical.

Which of the technology tools listed do you use or are you aware of?



Women surveyed cited cost, complexity and value as near equal barriers to using the technology.⁴ Many requested attributes indicate their desire for personalized motivation and automated, contextual tracking (see word cloud below). In essence, a better version of what already exists; a faster horse.



Common descriptors like “personal trainer” and “motivation” point to a desire for technology to provide more human, emotional elements. Our respondents innately reflect these characteristics in their hopes for wellness technology, while in the next breath expressing skepticism that even their “ideal” technology could deliver on their wellness values and craving for genuine human connection.

Women are skeptical about how technology can keep them well.

“I think addressing the mental and emotional side of wellness is a very high, if not impossible, bar for...technology as we know it now to really play in that space...You can track how you feel but is that going to improve how you feel? Probably not.” (Age 34)

“As much as my life is digital...so much [of wellness] for me is human interaction with my friends and with other people...That experience with a device isn't really out there.” (Age 31)

Women’s relationship with technology is complex. Technology is both a source of convenience and a source of stress.

“I’m pretty impressed with the technology. Every day, I know at least once a day I think I am so glad that this stuff has been invented. I have been known to kiss my phone and say, ‘I love you.’” (Age 58)

“I hated seeing, oh, red, I failed. I didn’t reach those [goal steps], so at some point it becomes demotivating.” (Age 25)

“I have my wellness apps on my phone but what I really need to do is just put my phone away. It’s my biggest source of stress.” (Age 31)

IMPLICATION An emotional association with tech extends to well-tech and especially wearables because women see tech as both helpful and stressful. Today’s well-tech fulfills a tactical purpose and achieves tracking and aesthetic “quick wins,” but is not yet designed to promote the social and emotional components of wellness.

OPPORTUNITIES FOR THE WELL-TECH INDUSTRY The chart below summarizes the conclusions, implications, and opportunities that surfaced from our research. To truly impact women's wellness, the future of well-tech must transform from vehicles for tracking self-improvement and competition to facilitators of holistic well-being with a particular emphasis on female-specific values: support and connection.

CONCLUSIONS

Wellness is holistic. Women's ideal state of well-being is an ambiguous blend of balance and control that makes wellness challenging to measure.

The importance of social relationships across all aspects of wellness cannot be overestimated, particularly in the areas of information gathering and changing behavior.

Women have a hard time imagining well-tech designed especially for them and what they value in terms of wellness.

IMPLICATIONS

Goal setting is challenging because of the multi-faceted, amorphous, personal nature of wellness.

Credible wellness information sources = relatable ones. HCPs must increasingly practice empathy and invite patients to share lifestyle concerns in order to successfully impact their well-being.

Well-tech is making progress on aesthetics but brands are missing the emotional and social components of wellness.

OPPORTUNITIES

Start with tactical applications that integrate social activities and communication, including physicians, as well as emotional tracking, such as stress relief exercises. Well-tech brands should also consider wellness-oriented product positioning to complement design features.

METHODOLOGY

Close to 200 women participated in our multi-phased research project between August 2014 – May 2015. We first fielded an initial 24-question online survey, followed by focus groups and tele-depth interviews to explore richer insights sparked by our survey observations.

To evaluate survey responses, our advanced analytics team used a weighted ranking system by applying a factorial function, which enabled us to go beyond simple aggregate data to determine the relative importance of particular responses. We leveraged Verilogue's Reveal SR tool with smart search algorithms to assist our qualitative analysis.

SPECIAL THANKS

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About SSW

Saatchi & Saatchi Wellness (SSW) is a fully integrated wellness marketing agency. We're passionate about infusing the rational with a healthy dose of the emotional throughout every journey and experience we create. We believe that only when people feel something will they be able to do something to improve their health and wellness. SSW leads integrated marketing for clients along the entire wellness spectrum, including Nestlé, AbbVie, Allergan, Pfizer, and Sanofi, among others. Our full range of marketing solutions includes brand planning, multi-channel engagement strategy and content development, social marketing strategies and analytics consulting. Saatchi & Saatchi Wellness is part of Publicis Healthcare Communications Group, the largest healthcare communications network in the world.

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FOOTNOTES

- 1) eMarketer. Internet to Hit 3 Billion Users in 2015. November 2014. <http://www.emarketer.com/Article/Internet-Hit-3-Billion-Users-2015/1011602>.
- 2) Iansiti M, Lakhani K. Digital Ubiquity: How Connections, Sensors and Data are Revolutionizing Business. *Harvard Business Review*. November 2014. <https://hbr.org/2014/11/digital-ubiquity-how-connections-sensors-and-data-are-revolutionizing-business/ar/1>
- 3) Wang T, King T, et al. Digital Health Funding: 2015 Year in Review. *Rock Health*. December 2015. <http://rockhealth.com/reports/digital-health-funding-2015-year-in-review/>
- 4) SSW Women, Wellness and Technology Online Survey, August 2014: For the items you indicated "aware" but not "use," please let us know a few reasons why you haven't used these items yet.

Too expensive: 33%
Too complicated: 32%
Don't see a need for it: 35%