Rebel Thinking

RT

Good Rebels

United Kingdom Edition

The Age of Balance

Understanding the generation that makes wellbeing digital

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Wellbeing is in

Look after yourself! Take some 'me time'! Here's how to reach your wellness goals!

Sound familiar? The concept of 'wellbeing' has taken on a whole new life since we've all had to stay at home, in a time of anxiety and often away from loved ones.

The generation of 20-30 year-olds, **a mix of young millennials and old centennials,** face an exceptionally broad array of responsibilities and concerns due to being at the crossroads of life stages: studying, moving away from their childhood home, building a career, socialising, possibly finding a partner, maybe caring for their parents or even having small children.

It's no wonder then, especially during a pandemic, that **looking after oneself and one's wellbeing — both offline and online —** resonates particularly well with this 'digitally comfortable' age group. In fact, we found in our research that **72% of our participants have changed their wellbeing practices because of the pandemic.**

In addition to being an age group interested in self care and self development, this is also the group of consumers who will be making purchase decisions for the next 40-50 years, and is beginning to build a steady income. The ideal group for you to build **brand loyalty** with.

We surveyed 900 participants between the ages of 20 and 30 across three markets (UK, Spain and Mexico) and interviewed over 40 more, to understand, firstly, what wellbeing means to this age group. We set out to investigate how **COVID-19 has changed the sector digitally** and which consumer behaviours you need to know about. In this article we outline the opportunities for your brand. Spoiler alert: there are several.

According to Euromonitor, the wellness trend was actually well on its way even before the pandemic hit, with **the desire for self-improvement rising along with digitalisation** and mental wellbeing becoming a hot topic. In fact, it's predicted that the global health and wellness market will have grown by 5.3% by 2025, since 2019 (Statista.)

However, the increased interest in wellbeing and the coincidental closure of gyms, salons and other wellness providers, restaurants and in-person counselling services is more 'Ironic' than Alanis Morissette in the 90s. So what does this mean for you as a brand then? A huge opportunity, that's what.

In this piece, we'll tell you how your brand can leverage the growing digital wellbeing market for the generation that is hungry for it:

- **Mental wellbeing is top of mind — literally.**
- **Take a holistic approach:** all areas of wellbeing are interlinked, from money management to social relations.
- **Preference for digital** isn't just for the pandemic: these behaviours will stick.
- **Use storytelling** to show the impact on a consumer's quality of life.
- **Don't pretend to know it all:** inspire rather than educate.
- **Pay attention to your communications platform:** some are considered more reliable than others.
- **Know your market:** it's apps and social media for UK and video for Spain and Mexico.
- **Don't make wellbeing a luxury,** it needs to be accessible.

Be it for COVID-19 or not, wellbeing services and products in a digital format are here to stay. In fact, **over 80% of our UK participants have used a digital wellbeing resource or service, and across the three markets, the number is a huge 88%.** So what do you as a brand need to do to seize this opportunity? Here are **7 lessons** to get you started.

Lesson 1

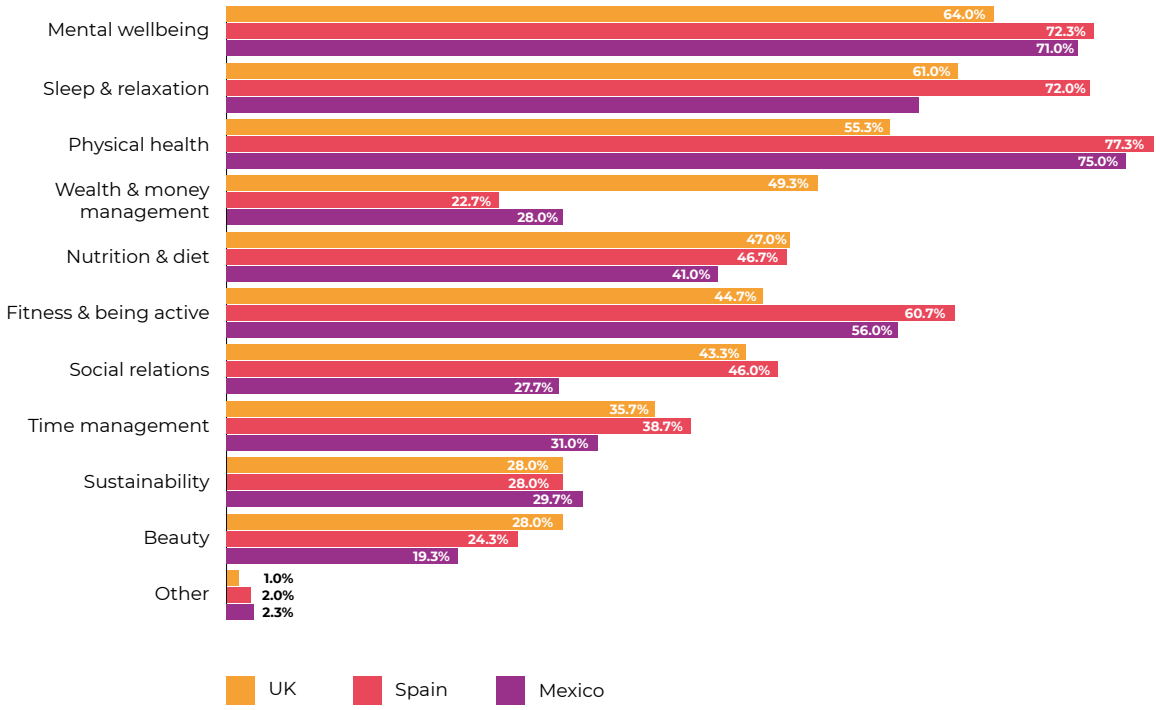
Don’t underestimate mental wellbeing

But first, what does wellbeing actually mean to the average 20-something?

It’s time to abandon the thought of a buff gym-hitting dude chugging protein shakes. The group we surveyed agreed across the three markets that **mental wellbeing is equally important as, if not more important than, physical wellbeing.**

69% of all participants listed mental wellbeing as one of their top wellbeing values (64% in the UK). Similarly to mental wellbeing and physical health, sleep and relaxation was listed as one of the key values by 63% of participants.

Which of the following areas are most important to you in your personal wellbeing? (UK, SP, MX)



Our interviewees expanded this even further by pointing out that being well also encompasses the **balance** between leisure and obligation, work and family, as well as 'me time' and socialising.

Statista reported in March of 2021 that 40% of their global respondents said the previous six months have had a negative impact on their mental wellbeing. In the UK, the number was a staggering 53%.

In a time where social contact is limited, this is understandable. In fact, **social relations are increasingly an area recognised as part of personal wellbeing management.**

In our research, 39% of all respondents chose social relations as a key area of their wellbeing. We see this emergence also with apps like Fabriq which helps consumers stay connected to those who matter and build consistent social habits. Watch this space.

Lesson 2

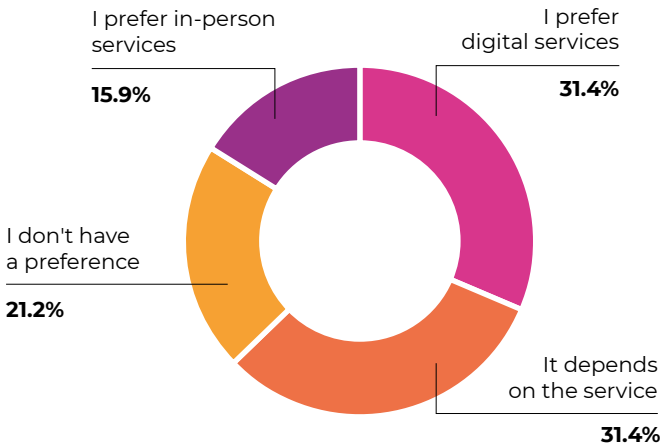
Prepare for the future of wellbeing to be digital

Countless sources, including Euromonitor report that lockdown life and the closure of services has hugely increased digital consumption and appetite for internet-based services.

So do young people use digital resources to manage their wellbeing purely due to the pandemic and the lack of in-person services?

The simple answer is no. In fact, in the UK **only a minority of 16% of participants preferred in-person services.** 31% preferred digital services, and another 31% stated it depends on the service in question. The remaining 21% didn't have a preference.

Do you have a preference between digital or in-person wellbeing services? (UK)

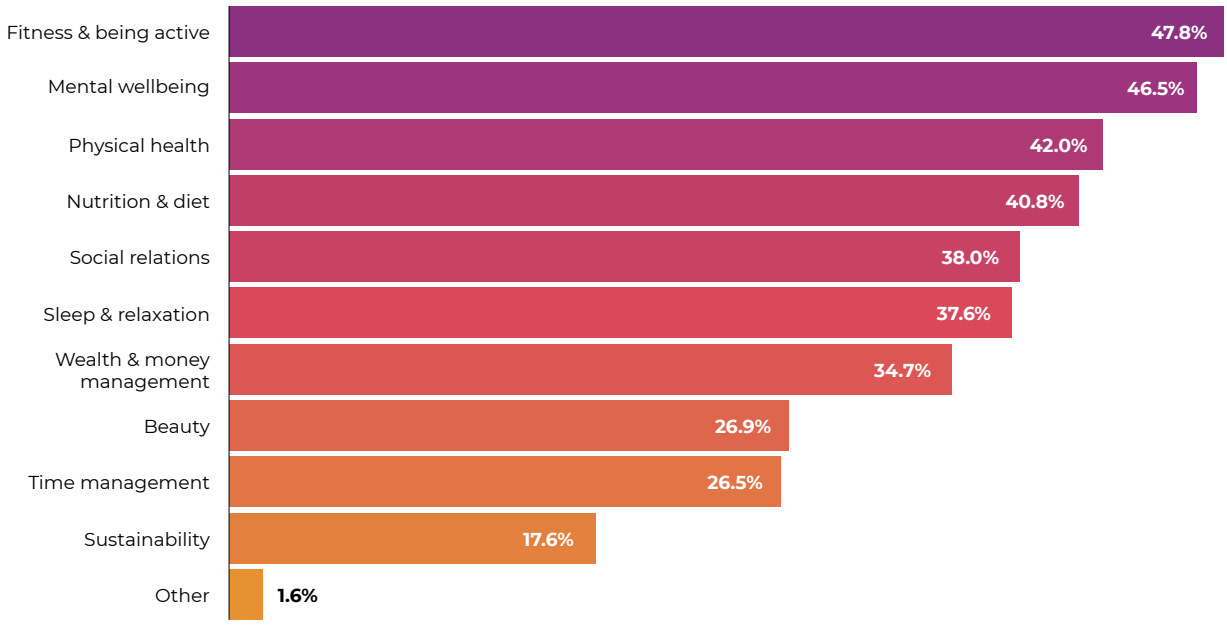


Price and affordability is of course an undeniable factor, but what became clear in our interviews was the importance of **accessibility.**

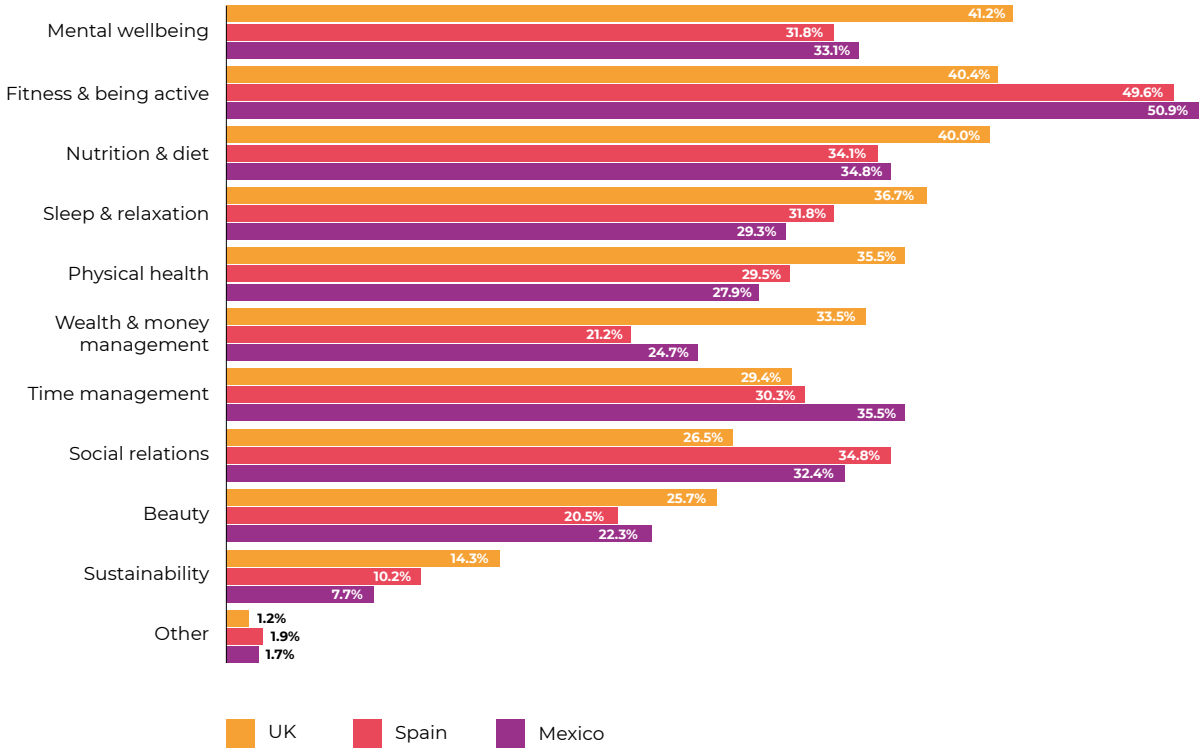
Clearly, wellbeing management moving to a digital format is not just a product of the pandemic but rather a broader sign of the times and a **digital future.**

Furthermore, our UK research found that these resources are used by, and preferred by, 20-30 year-olds for a broad variety of wellbeing and wellness areas:

For which areas of your personal wellbeing do you use digital resources? (UK)



Which wellbeing areas do you prefer to use digital services for? (UK, SP, MX)



Lesson 3

Don’t pigeonhole your services

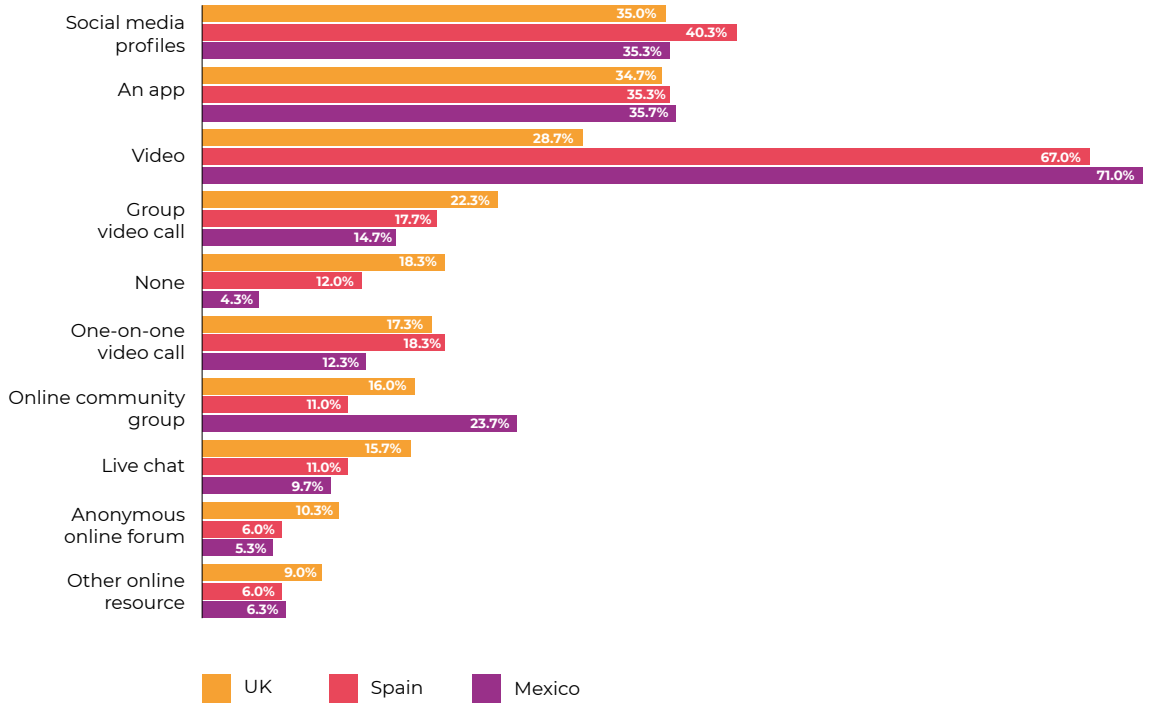
So when we talk about accessing wellbeing services digitally, how exactly does this happen?

In the UK, the most commonly used resources are social media profiles and apps, with 35% reporting using each, respectively.

The situation is quite different in the other two markets. In both Spain and Mexico video (pre-recorded or live) is overwhelmingly the most popular resource for wellbeing content, with 67% in Spain and 71% in Mexico preferring this resource.

This could be linked to the UK still being a more digitally mature market where, particularly the younger generation, is drawn to services ‘on the go’.

Which digital resources have you used to access wellbeing services or to manage your personal wellbeing? (SP, UK, MX)



The impact of your brand on the audience, however, depends on the value offering; rather than a siloed approach, this age group prefers a **holistic approach to wellbeing.** In fact, nearly half of UK participants also selected wealth and money management as an important part of their wellbeing, and 43% selected social relations as a key element. And let's not forget the overwhelming importance of mental wellbeing.

So forget calorie-counting apps and gym trackers as stand-alone services, they are more likely to induce stress and heart palpitations than a feeling of being in control of one's wellbeing. **This age group is looking to break free from obsessing about their fitness progress and being compared to others, reaching for a goal that is always unachievable because it's not personalised to them.**

The best thing a brand can offer to a 20-something consumer, is a service or product that will impact their actual quality of life. Yes, **quality of life.**

Wellbeing is an all-consuming state of being and, while we don't suggest you need to be able to offer a whole new life to your customer, the starting point is to understand what the purpose of your product or service is in helping them achieve their goal or accomplish their desired outcome. What is the job to be done?

It's simply not enough to offer a quick fix to your consumer, nor is it enough to offer a siloed solution for an isolated area of life. In fact, a 'quick fix' solution is detrimental to both the consumer and the brand itself. The consumer has no motivation to stay loyal to the brand, who then consequently loses a customer.

Some brands have already internalised the shift to a holistic service offering. For example Very, a service that combines workouts, meditation, recipes and more. Even Nike has its now-famous Run Club app offering guidance and inspiration for aspiring athletes.

Kellogg's is an example of a brand that is on its way to reinventing itself as a 'wellbeing brand'. It has gone beyond its realm to help consumers look after themselves by connecting its plant-based food portfolio with physical, emotional and societal health, by 'redefining nourishment'.

Lesson 4

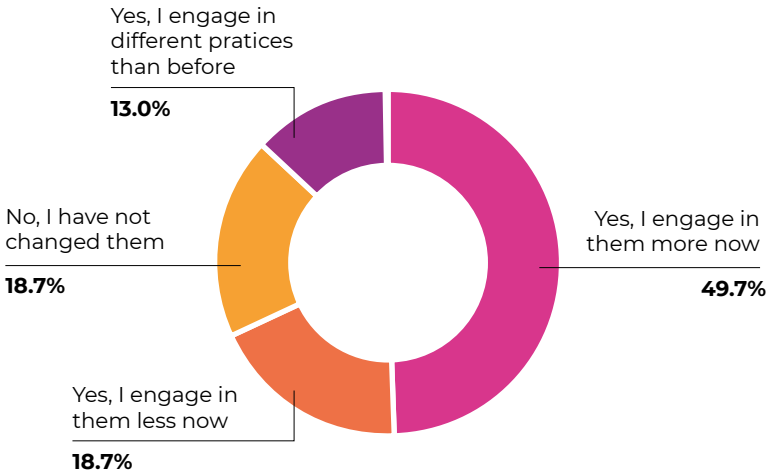
Remember, the pandemic has only accelerated an existing digital trend

In the UK, 82% of participants consciously engage in wellbeing practices at least weekly, and half of them daily. This combined with there being a wealth of digital resources available to make use of, and that nearly 90% of participants have used a digital wellbeing resource, means this is a **quickly accelerating sector.**

50% of UK participants reported that they engage in wellbeing practices more now than before the start of the pandemic. Furthermore, half of those who report engaging in wellbeing practices less now still practice them daily. These figures tell us two things: **1) the activity around one's wellness has increased and 2) subsequently the digital activity around one's wellness has inevitably increased too.**

Research by Statista confirms this trend, with 48% of global respondents predicting they will be more likely to actively try to improve their health and wellbeing because of the pandemic.

Have you changed your wellbeing practices because of the pandemic? (UK)



Lesson 5

Brands like yours should motivate, not educate

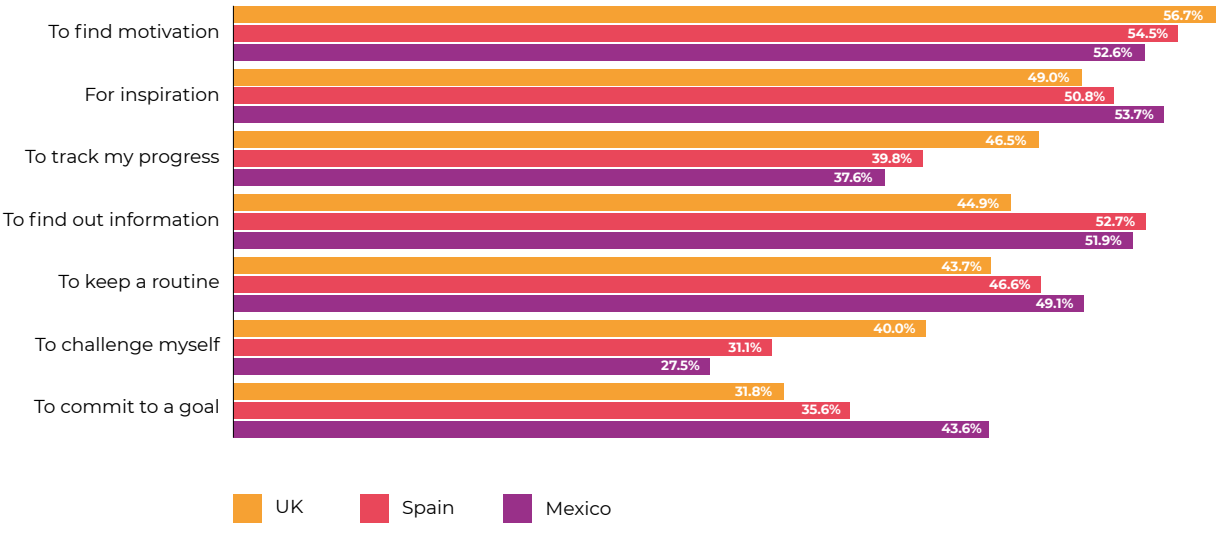
There is a wealth of information out there, and it can feel like a very saturated market, but there are ways to make your brand more likely to stand out.

The first aspect to consider is **credibility and reliability as a brand.** As much as wellbeing and health are trending topics right now, that doesn't make experts out of those who weren't experts previously. **In the jungle of influencers and pseudo-scientific claims, the best course of action is to focus on your own territory.**

Our respondents ranked medical and specialist sites the most reliable sources of information, followed by social media profiles of professionals. In contrast, social media profiles of brands ranked poorly in reliability.

The second is what the value offering really is. This generation is above all seeking **motivation**. Conclusion? A brand should support and provide resources and inspiration, but not throw around claims or advice that should be left for experts.

What do you use digital wellbeing services for? (UK, SP, MX)



So how can you reach the 20-something wellbeing audience? The top three ways this generation becomes aware of digital wellbeing services are:

1. **Online search.** SEO is your friend but remember that the most reliable sources are medical or specialist websites. It's therefore more effective to build brand awareness than rely on people finding your brand by product benefits alone.
2. **Social media / digital advertising.** The content this age group wants to see from your brand on these channels is inspirational.
3. **Word of mouth.** Advocacy is the single most powerful way to target the right audience rather than merely a large audience.

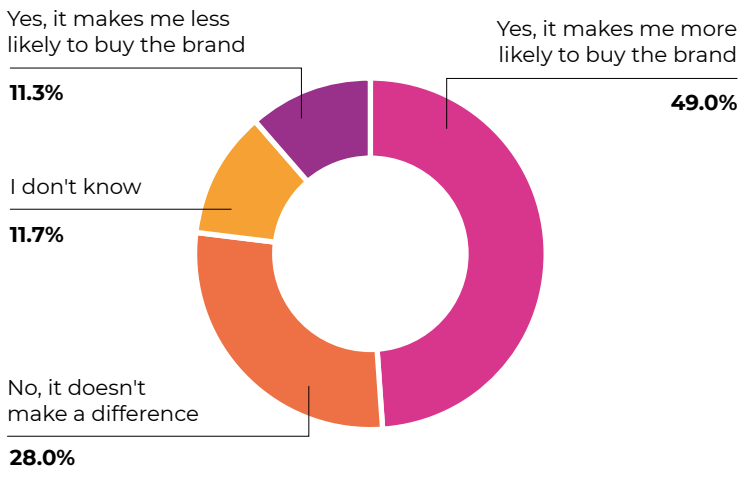
Lesson 6

Make wellbeing your key value

With all the free apps, software and services out there, is it actually possible for a brand to capitalise by jumping on the wellbeing wagon? Absolutely.

While the majority of participants have not paid for a digital wellbeing service or product (67% across all participants, 66% in the UK), the impact of a brand caring about its consumers' wellbeing is undeniable. **In fact, half of UK participants say that they are more likely to buy a brand if it promotes wellbeing.** Examples from our participants were Holland & Barrett, various mindfulness apps and even the NHS.

Does wellbeing as a brand value impact your purchase decision? (UK)



When we asked our participants to mention brands they consider to be ‘wellbeing brands’, or brands that have wellbeing as a key value, the results were surprising in a number of ways.

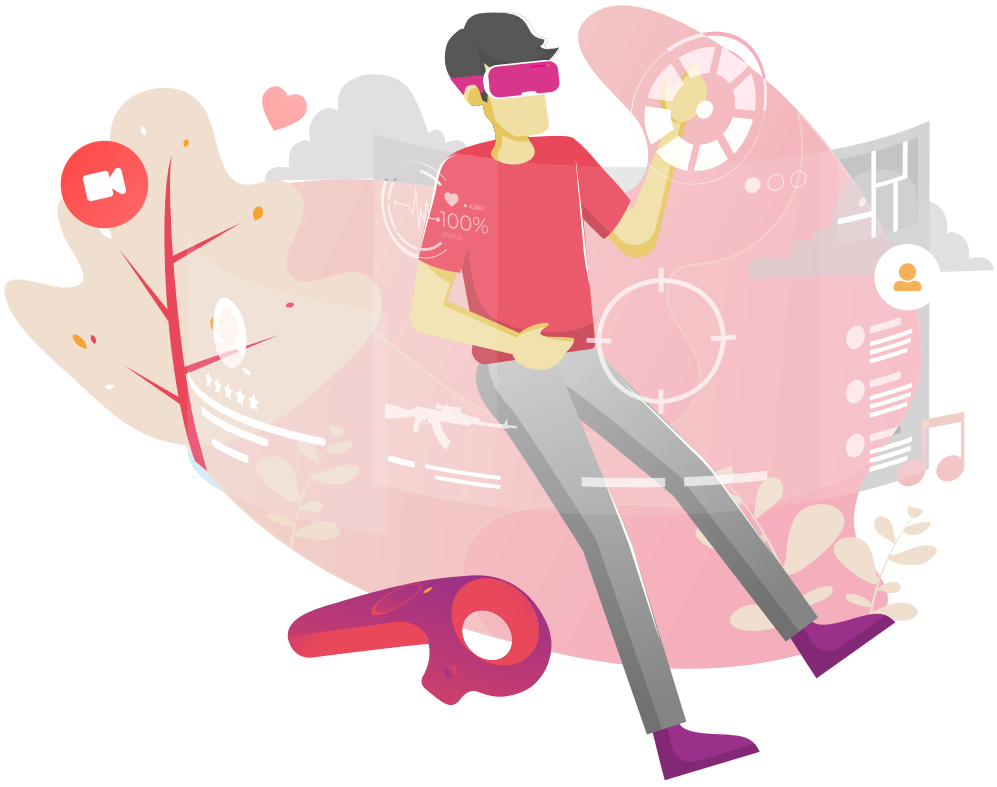
In the UK, the top brand mentioned was Nike, followed by Headspace, Calm and Gymshark. Generally, the brands mentioned by UK participants were ones aimed at specific areas of wellbeing (exercise, mindfulness, etc.).

In contrast, in Spain and Mexico, the brands participants associated with wellbeing were everyday consumer goods such as Nestlé, Danone and Nivea, and even IKEA. The brands in the UK were also predominantly **digital**, unlike in the two other markets.

So what does this tell us about the mindset around wellbeing in the different countries?

Firstly, the UK is a more mature market when it comes to digital wellbeing resources.

Secondly, in Spain and Mexico wellbeing seems to be more integrated into everyday habits and a less ‘conscious’ approach. **In the UK however, wellbeing is clearly a ‘goal’, an achievement, something to actively strive towards, particularly for the generation that is currently between the ages of 20 and 30.**



Lesson 7

Be inclusive and accessible

The concept of wellbeing as a separate, conscious element in the UK is critical to consider and question as a brand. **Wellbeing (and wellbeing services) seems to be considered somewhat a 'luxury' in the UK.** This was confirmed by the demographic data in our survey: we found that participants on benefits reported using digital wellbeing resources less than other income groups. 43% of those on benefits answered 'none' to the questions of what digital wellbeing resources they have used, whereas for all other income groups the number was less than 25%.

In a digital era, for a generation desperate for wellbeing resources, accessing them should not be a luxury reserved for those with the highest income.

For a brand to be truly living its values, it's essential that the products and services are accessible to all consumers. Why? There is nothing more detrimental to one's wellbeing than not having access to resources that would improve it.

As a brand, here is what you should remember:

- The importance of the **mind** in wellbeing should never be underestimated.
- Long-gone are the days of single-minded wellbeing services. This generation appreciates a **holistic approach** to self-care.
- Offer a long-term solution that improves **quality of life,** rather than a quick fix. Use storytelling to connect with consumers.
- This generation is looking for **motivation and inspiration,** not rigorous progress tracking.
- Where there is a platform, there is an **audience.** But beware, even though social media channels are an important outlet, they are not considered a reliable source of information.
- You don't need to be an expert in 'wellbeing' — in fact for the sake of credibility, acknowledge the importance of the topic of wellbeing and support and motivate your consumer, but **don't pretend to know it all.**
- Don't think the wellbeing sector has only temporarily moved online - its **future is truly digital.**

DISCOVER MORE

Appendix: How the research was conducted

1. Knowledge

The online panel allowed us to capture valuable quantitative data on the behaviors, thoughts and attitudes of the target population.

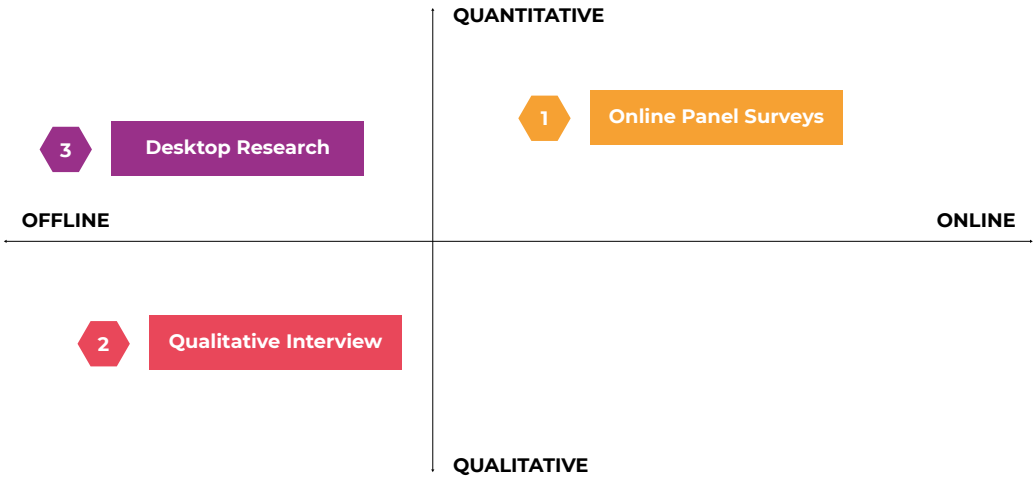
The data gave us insight into online shopping, digital behaviors and brand decisions.

2. Deep-dive

On the basis of the survey data, we conducted qualitative interviews with a number of research subjects. This gave us insight into the reasons behind certain behaviors, and the way this generation comes to trust a brand.

3. Context

We placed our findings into context by investigating existing insights. This allowed us to translate our insights into actionable recommendations for brands.



1. Knowledge

- 900 digital participants aged 20-30
- 300 in the UK
- 300 in Spain
- 300 in Mexico
- No other pre-defined demographics
- 22 multiple choice questions, 1 open question

2. Deep-dive

- 40 qualitative interviews
- Participants aged 20-30
- No other pre-defined demographics
- 15 open questions

3. Context

- Secondary research sources:
  - Statista
  - Euromonitor
  - Harvard Business Review
  - Global Wellness Institute

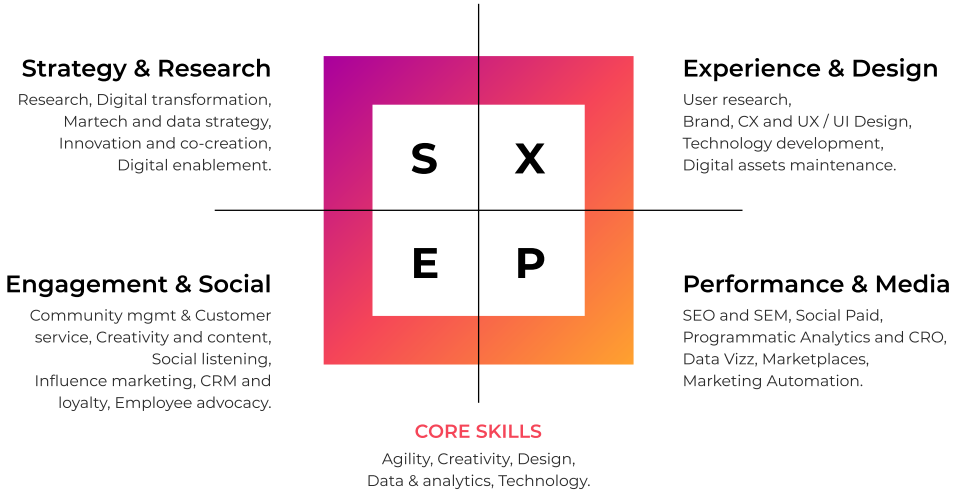
About Good Rebels

We create digital experiences that connect brands and people. Agile solutions that touch people's hearts.

120+ Rebels in Spain, the UK and Mexico helping our clients become more human-centred. Strengthening relationships with their customers, employees and with society. Designers, strategists, creatives, community managers, UX experts, data analysts, programmers... bringing ideas to life.

Founded 20+ years ago, our company has transformed the marketing vision of brands like Toyota, IKEA, Santander, LG Electronics, Abbott Laboratories, H&M or Pepe Jeans.

Our services



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Let´s talk

Good Rebels

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