

Ogilvy study first to quantify the wellness gaps for growth

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The US\$4.5tn global wellness economy - growing twice as fast as the world economy - is now so pervasive that 73% of consumers consider wellness an essential element of a brand's strategy. The Ogilvy Wellness Gap study released today has, for the first time, quantified the gap between consumers' wellness expectations and how brands deliver on these expectations in seven key sectors - food, snacks, skincare, airlines, hotels, cars and banking.

Ogilvy surveyed 7,000 consumers from 14 countries on four continents to gain new insight into how we see wellness in 2020 and to help marketers close glaring opportunity gaps. Research was conducted in April 2020, a time when wellness declined rapidly for many people. Its importance has become even more significant as we move into 2021.

Wellness has created new conversations, new expectations, new purposes – for companies and individuals. Wellness has inspired new businesses, new brands, new products, new services and new experiences. Wellness has seen companies pivot their strategies, businesses and portfolios. It has revolutionised entire industries.

Today, 77 % of people say wellness is very or extremely important to them. Yet, consumers are still hungry for more.

Hungry for more wellness – 80% of people want to improve their wellness.

Hungry and expectant – 75% feel brands could do more for their wellness.

Hungry and frustrated – only 46% feel that brands prioritise their wellness.

Major wellness industries like food and skincare, for example, have innovated and grown around wellness for the past two decades. However, only 41% of global respondents agree that the food sector is doing all it should to help them with their wellness. The figure is 53% for the skincare sector.

We think this is great news for brands. It shows that wellness remains an opportunity for double-digit growth by meeting various consumer expectations to close the gap.



Another important conclusion of the report is that every brand can grow through wellness. Wellness is no longer solely a component of the luxury spa sector, nor the preserve of wellness brands; consumers views are clear:

73% say brands need a wellness strategy as part of their core mission

67% say there should be more wellness options, regardless of what they're shopping for

52% expect cars, banks or airlines to offer wellness options – almost the same as the snack-foods category (56%)

Consumers expect every brand to contribute to their wellness. And 59% agree it's worth paying more for wellness options.

Social, and purpose, are the new wellness frontiers for brands.

While healthy meals, good sleep and time to relax remain critical wellness priorities globally, this study finds that wellness is now less self-centered.

In 2020, wellness has four facets: physical, psychological, social and purposeful.

More and more, people tell us they can't feel well if they don't feel connected or if they don't contribute to making the world a better place.

71% say a wellness brand should make a positive difference

60% say it should give them a sense of purpose

53% say a brand should help them feel connected

This opens opportunities for brands to form closer bonds with their consumers through activating purpose. Upgrading a brand's social strategy through the wellness lens can lead to richer, more personalised connections and more successful social commerce.

Lastly, the report shows an opportunity to close the authenticity gap. Consumers can spot "Wellness washing", and only 41% agree that brands that make wellness promises are usually believable. Further, 53% say they find it hard to tell the difference between real and fake wellness claims. People want authentic stories, ingredients they can understand, benefits they can believe and most important, brands that deliver on their promises to develop a strong competitive edge.

The wellness economy offers exciting growth prospects in consumer-goods marketing and Covid-19 will only accelerate this phenomenon. But there is a profound, urgent need to reframe the wellness offer and close the wellness gap for consumers. The Ogilvy Wellness Gap study helps brands find growth opportunities in the exciting new business frontier of customer wellness.

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