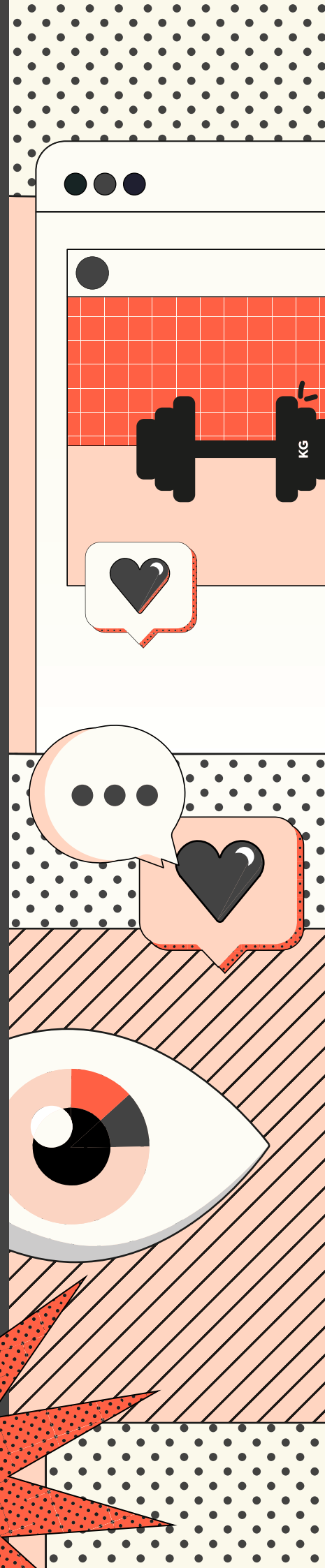
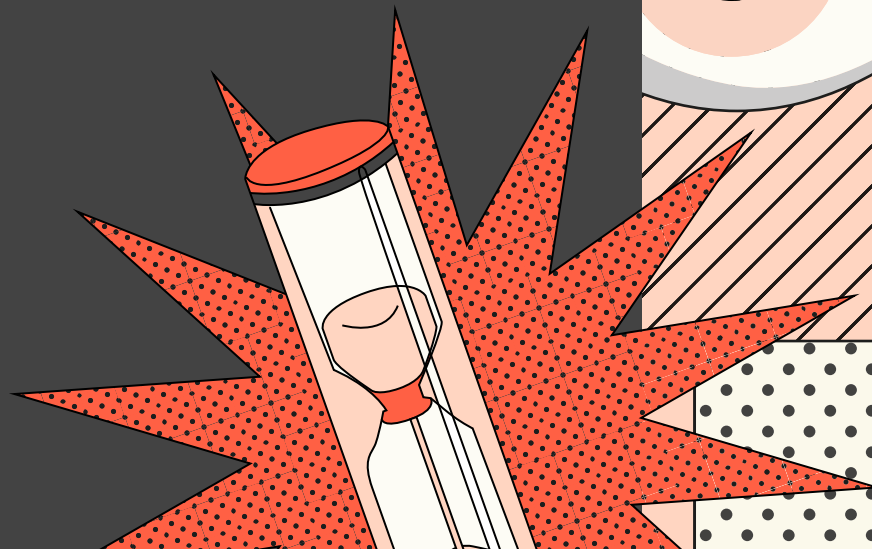


The Ultimate Commodity:

How Health & Wellness Brands
Can Win Customers' Time on Social

Cubaka.



Contents

Chapter 1: The State of Play	4-7
Chapter 2: The Social Revolution	8-11
Chapter 3: FMCG Brands Building Healthier Relationships	12-15
Chapter 4: The Rise of Fitness Technology	16-21
Chapter 5: What can we learn from this?	22-24
Chapter 6: The future is upon us	25-27

1

The State of Play

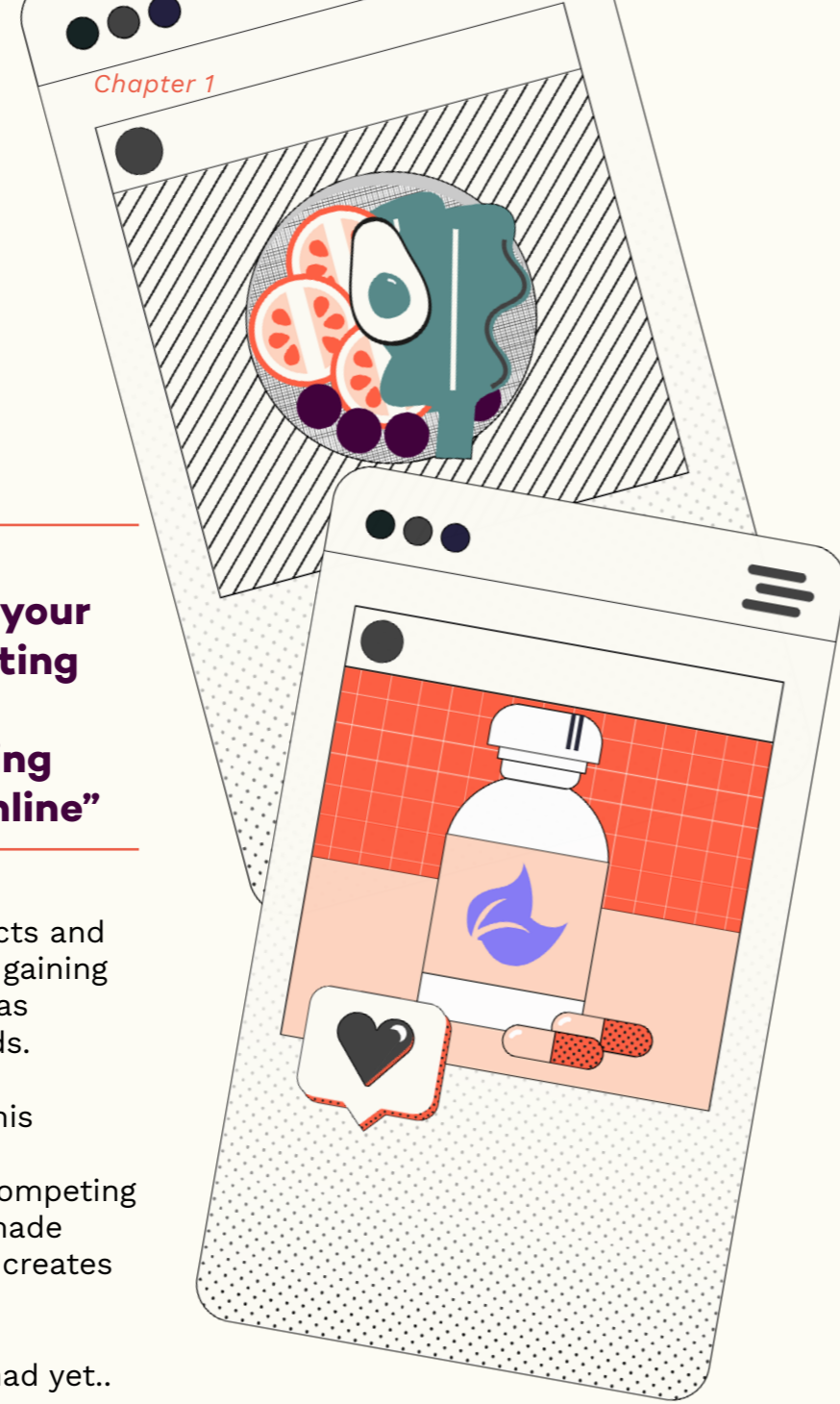
FUN FACT: There are now 3.8 billion active social media users around the world. The average UK consumer spends six and a half hours viewing digital content online every single day.

“With physical availability of products and services being severely disrupted, gaining and retaining mental availability has become a critical lifeline”

Today, social channels and mobile devices soak up the majority of our media time. Before the world went on lockdown, the typical consumer would spend two hours and 15 minutes per day on social media, with 90% of millennials using social media sites at least once per day.

Under lockdown conditions, we’re spending even more time on social: 47% of social media users report spending more time buried in their phones, raising even higher to 58% and 48% of Gen Z and Millennials, respectively.

So what’s gathering the most lockdown attention at the forefront of everyone’s lips (and hips)? Health and wellness. Brands across all industries are adjusting their content strategies to coincide with the effect, and resulting health-driven mentality, of COVID-19.



“For health and wellness brands, this means that your content isn’t just competing with rival brands; it’s competing with everything that’s ever been made online”

With physical availability of products and services being severely disrupted, gaining and retaining mental availability has become a critical lifeline for brands.

For health and wellness brands, this means that your content isn’t just competing with rival brands; it’s competing with everything that’s ever been made online. This wealth of information creates a poverty of attention.

But there are rich pickings to be had yet..

Traditionally, marketers have attempted to reach customers based on assumptions, demographics and insights on interests.. In today’s environment, forget it..

Today’s consumers are driven by behavioural motivators: emotion, instinct and identity shape the way consumers shop in both “normal” circumstances as well as times of crisis.

It’s now possible to gain individualised behavioural insights that enable bespoke


targeting based upon your audience’s personality profiles.

These behavioural insights can be the difference between content people ignore and content that forms a life-long relationship between customer and your brand.

Brands at the top of their game target the mass market using a behavioural approach. Now we’re talking.

BIG MOVES: To better understand customer attitudes, behaviours and decision-making, Cubaka commissioned a consumer research survey for the UK market. Polling 1,000 consumers, we sought to uncover how the public truly feels about social media content within the health and wellness industry.

The results are in, and they’ll blow your mind..



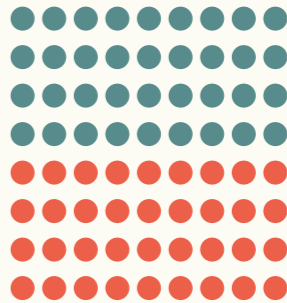
Get this: 75% of shoppers turn to social media when they make a decision to become healthier.

16-34 Years

Younger generations are even more bullish, with 95% of 16-to-34-year-olds using social media to support their health or fitness journey.

Home Worko

Searches for “home workouts” and “recipes” have tripled since going on lockdown, with some brands and influencers seeing up to a 1250% increase in interest.



Today, more than half of consumers have purchased a health and wellness product as a result of seeing something on a social media platform.

4
10

But not all brands are winning in this space. According to eMarketer, social media advertisers waste about one-fourth of their budgets on ineffective channels and strategies.

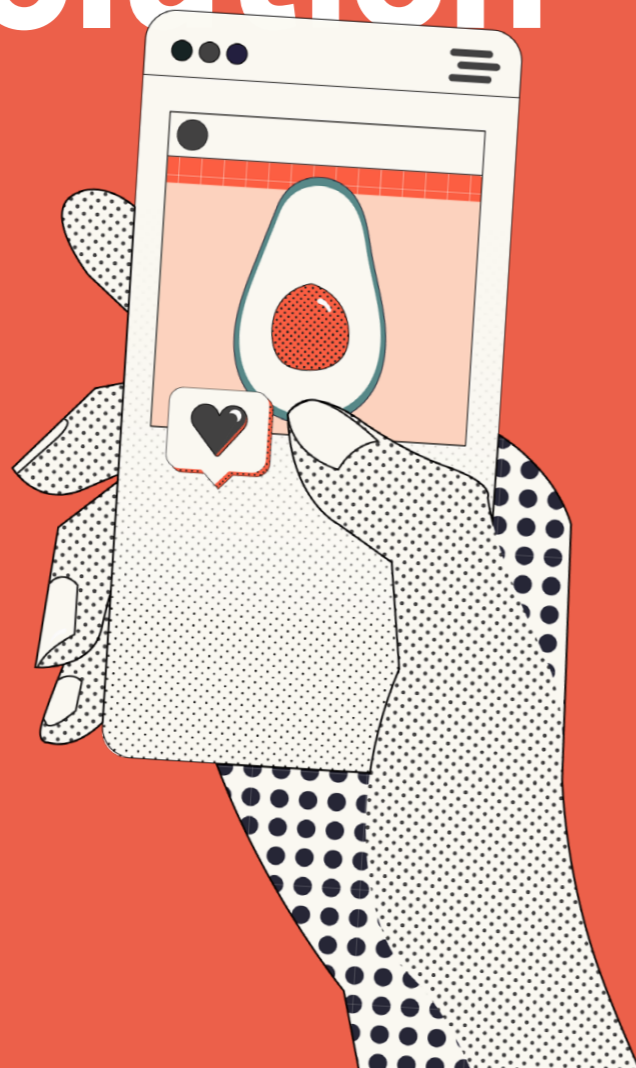


The message is clear: in a world saturated with content, only the most strategic, creative and targeted content will cut through the noise.

This is how you win time with the people that matter most.

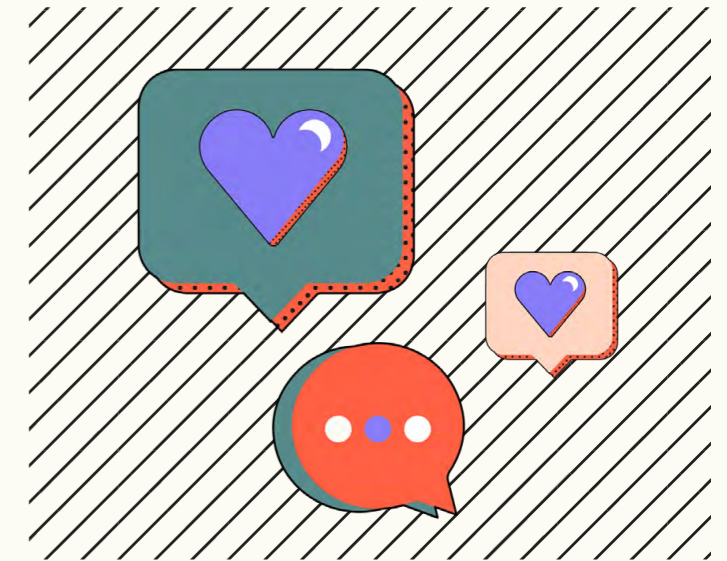
2

The Social Revolution



Over the past decade, technology and consumer behaviour have converged to create an entirely new method of communication. Today, brands and consumers talk, share and engage with each other via social media – now the most popular medium of exchange in the world.

For health and wellness brands, this is your moment to stand out. Whether you're looking to promote new products, share healthy advice or simply support your customers in their health and wellness journey, knowing where to start is key.



We asked the public, “What are the top five platforms you visit when seeking health and wellness content on social media?”

Across all age groups, the results were:



Interestingly, London turns to Instagram for health and wellness content more than any other city or town in the UK, with 44% of Londoners visiting the platform to source content. Location can play a role in behavioural patterns, so it's important to consider where your customers are based.

Social is far more relevant for younger generations, as a whopping 55% of over

55s never turn to the channel when they decide to become healthier.

While these insights help form a basic level of customer narrative and insight, it's no longer enough to simply collect demographic data and track customer attitudes. To really win time with people, you need to understand the principles and applications of behavioural science.

The Elephant & The Rider

As celebrated Creative Director Rory Sutherland says, “The human mind does not run on logic any more than a horse runs on petrol.”

In other words, humans mainly act emotionally on instinct, and then post-rationalise their decisions when explaining this to themselves and others. The reality is far from prosaic. In truth, marketing is best served with a healthy understanding of human behaviour.

Let’s consider the following analogy - The average consumer is akin to a rider on the back of an elephant. That person can hold the reins in their hands and direct the elephant to turn, stop or go, but only when the elephant doesn’t have a desire of its own. When the elephant really wants to do something, the rider is no match for it.

Psychologists use this analogy to describe the constant battle between our emotional and rational minds. The elephant, powerful, strong and impulsive, embodies our base needs that are critical for survival. These are highly emotional and often deeply wired into how we act. The rider, on the other

hand, uses logic, reason and language to process information and make long-term decisions. This is the rational side of the brain that is more thoughtful and deliberate.

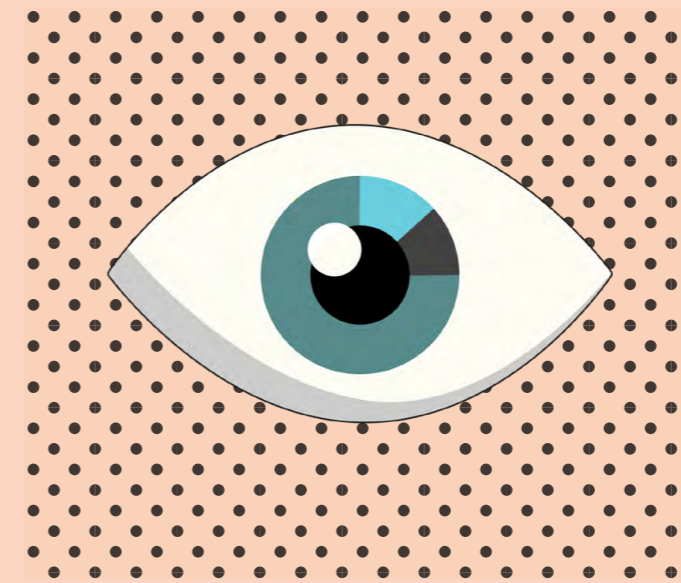
This dichotomy of thought is explained by behavioural psychologists as “System 1” and “System 2” thinking. System 1 is fast, instinctive and emotional; system 2 is slower, more deliberative and more logical. These two systems are not completely separate but are actually in constant communication.

System 1 and 2 thinking describe the process of our mind to react to the world around us. In the first instance, we automatically respond using our instinctive, immediate and biased system 1. Through the length of this system, we interpret reality based on our experiences. System 2 is slower, more logical and allows us to express our agency and control over experiences. “I want to feel good, get fit and try yoga because it looks fun” vs “I’m going to start this 10 week online yoga course because I want to learn and I can fit it into my morning routine.”

Understanding the modern health and wellness customer

Ultimately, your customers are human, right? They’re all different. Some are dominated by an emotional approach to reality, while others are moved by the need to challenge their assumptions through logic and facts.

Each person has individual style, tastes and preferences. So why would you send them all the same message? Right. You wouldn’t. You run the risk of triggering psychological reactance and even turning customers off.



To appropriately deliver what your customers really want, you need to gain a deeper understanding of your audiences: what influences, triggers and drives them to make decisions? What can you learn about their assumptions and stereotypes through system 1 thinking?

Nearly two thirds of consumers

64% find it hard to distinguish between

health and wellness brands on social media without seeing the brand name or handle.

These vital behavioural and psychographic insights should form the basis of a strategy that targets specific personalities with bespoke messages.

While there’s a marked appetite for social content, health and wellness brands aren’t doing enough to use this opportunity to build their brand. You must be distinctive.

This will blow your mind: nearly two thirds of consumers (64%) find it hard to distinguish between health and wellness brands on social media without seeing the brand name or handle. For younger shoppers aged 16 to 34, that number jumps to 78%.

Whether you sell healthy food alternatives or want to drive gym memberships, the key question remains the same: how do you stay front of mind and remain distinctive when people are exposed to so much content?

Let us show you..

FUN FACT II: Britons spend upwards of £200m per month on organic food products alone. Across the UK, rising consumer awareness and a focus on health and welfare standards is ushering in a new era of healthy food products.



3 FMCG Brands Building Healthier Relationships

The past decade has seen a marked increase in the demand for ethical and environmentally friendly food options. The 2020 Organic Market Report shows the UK organic market is in its eighth year of steady growth, now worth £2.45bn after growing 4.5% percent from 2019.

Living in a time hyper-focused on health and kindness toward our communities, combined with many experiencing the effects of supply chain disruptions, makes consumers even more likely to seek out healthier, more sustainable and locally-sourced products.

To meet these new consumer demands, a number of health food brands have sprouted. Start-ups like Whole Earth, Biona, Livia's, Siggis and Pukka have transitioned from serving niche audiences to own a place in the mainstream psyche.

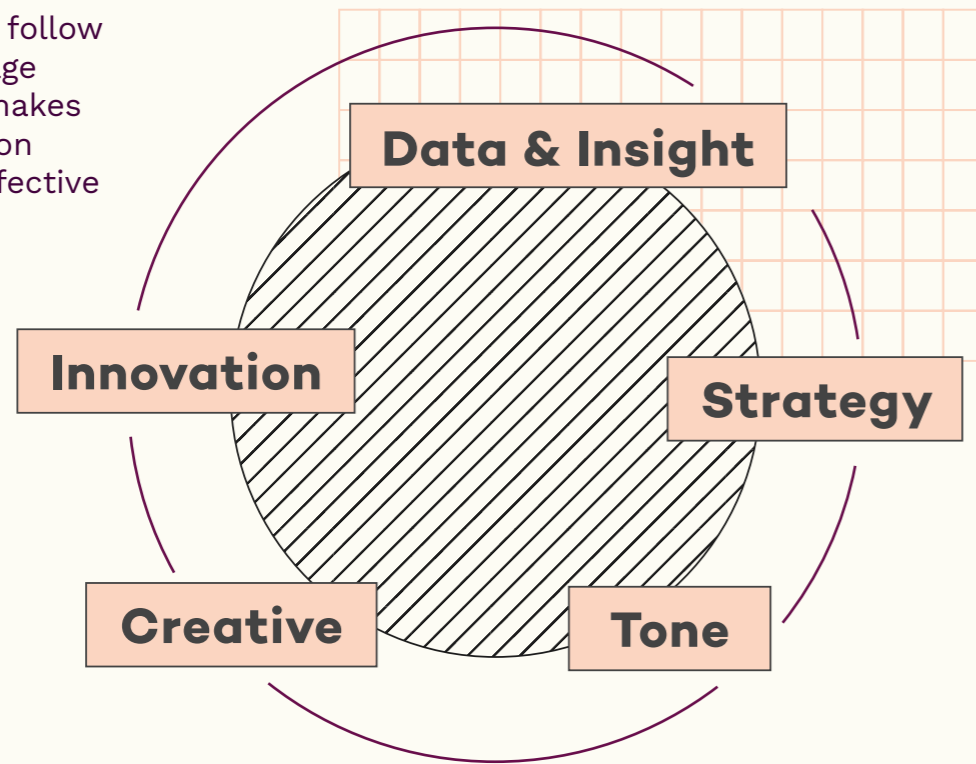
These companies are becoming the go-to suppliers of healthy food products for a new generation of environmentally and socially conscious consumers. But with rising popularity comes increased competition.

So, how can today's health and wellness food brands win time with customers on social?

A 360-degree approach

As we've seen, competition for relevance and attention is at an all-time high. Unfortunately for brands, this is going to get even tougher. According to our research, more than half of shoppers (52%) want to spend less time on social media,

At Cubaka, we follow a stage-by-stage process that makes content creation much more effective and targeted:



while a fifth (22%) have already imposed limits. This attitude hasn't shifted at all, despite spending more time on social media during lockdown, as users believe they are wasting their time on low-quality content.

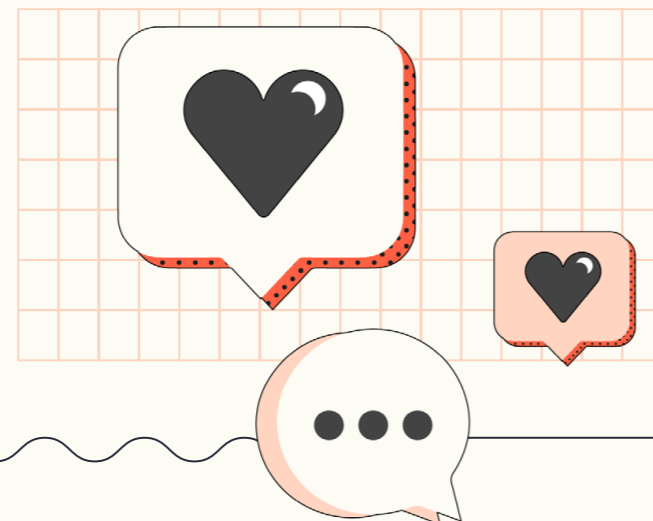
We believe this trend is only going to increase, so winning time with your customers will become even more pivotal to success. Health and wellness brands must be cognisant of two competing forces: on the one hand, people are looking to spend less time on social platforms, and on the other, brands and everyone else are producing more and more content.

This creates the perfect storm for social campaigns that fail to cut through and motivate your intended audience to take the action needed to grow your brand. Brands should focus less on quantity of content and more on quality. The goal

should be to create assets that people enjoy spending time with help make your brand both distinctive and memorable.

To do this, you need to activate a strategy that targets specific personalities with specific messages. This means taking a holistic, 360-degree approach to designing and producing social content.

At Cubaka, we follow a stage-by-stage process that makes content creation much more effective and targeted:



What should your content look like?

With carefully crafted content, you can target shoppers psychographically to serve bespoke content based on their emotional, rational and behavioural identities. To dive deeper, we asked UK consumers a simple but powerful question: "What would turn you off purchasing a product from a health or wellness brand?" FMCG health and wellness brands take note. Shoppers would be turned off purchasing a product from you if...



While final content creation should always be tailored to individual psychographic profiles, it's still vital to learn from wider social trends. The survey results confirm our position: humans are highly illogical and make decisions based on a number of competing rational and emotional factors.

"Pressure" as a turn-off makes sense; we've all felt the psychological resistance to doing something someone tells us to do. And whilst pressure can be useful in some instances to drive behaviours among certain audiences (e.g. a flash sale) it's not something that's likely to produce positive results in long term brand building.

"Celebrity or influencer" endorsements are ranked as the second highest turn-off which may surprise some, particularly given its ubiquity of use within the health and wellness social media landscape.

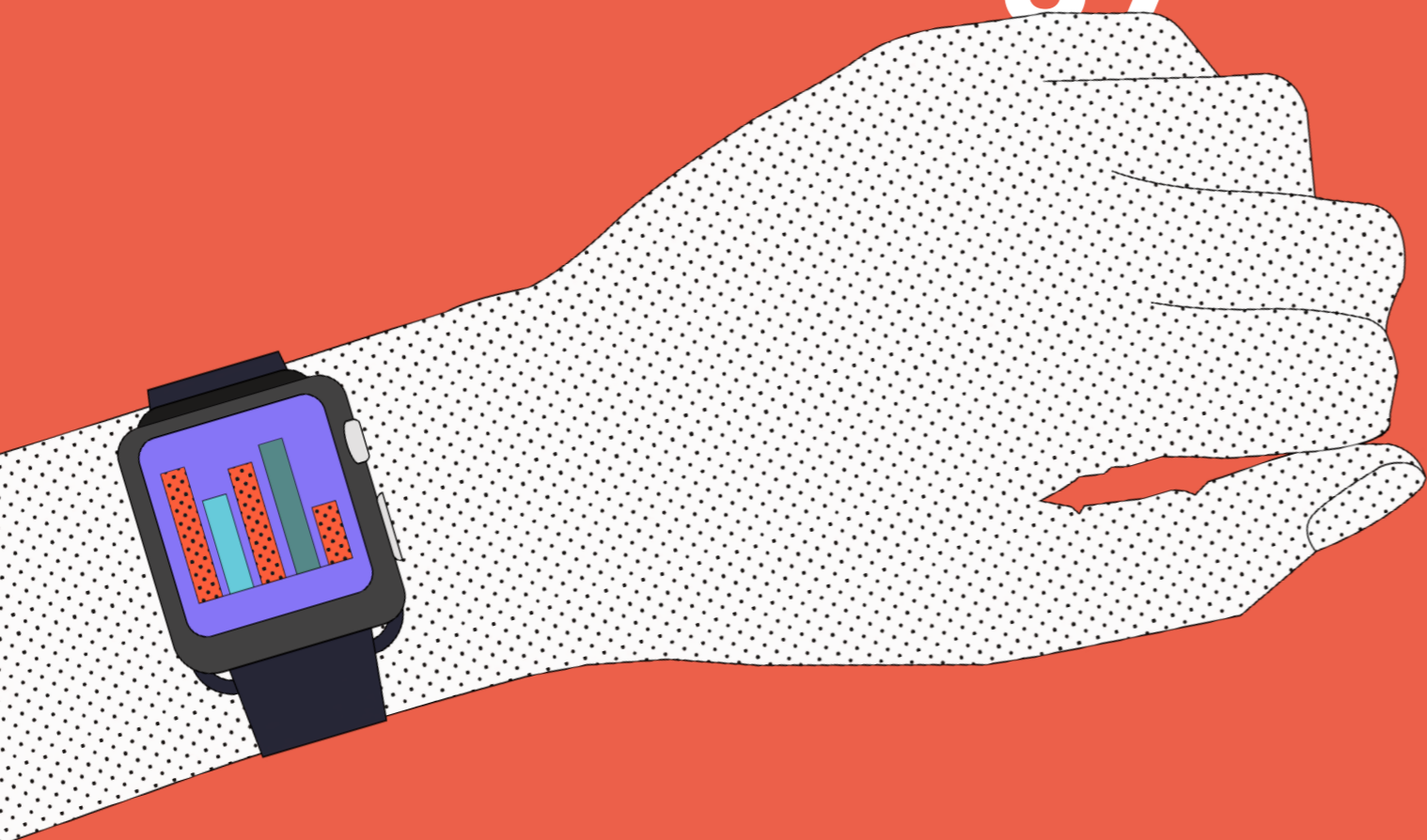
This reveals a stark but telling truth: just because a piece of social content works for someone doesn't mean it works for everyone. While influencers are a popular option for FMCG health brands, this move could be putting off a quarter of your audience.

Take another example. A fifth of consumers don't want social content to feature healthy or fit people, yet nearly another fifth would be turned off if social content did not feature people that they aspired to look like.

This contradiction best encapsulates the need for real strategy and psychographic targeting, rather than a one-size-fits all approach. Content, then, must be designed to match the specific needs of the individual, rather than a generic assumption based on persona mapping or demographic insights.

4

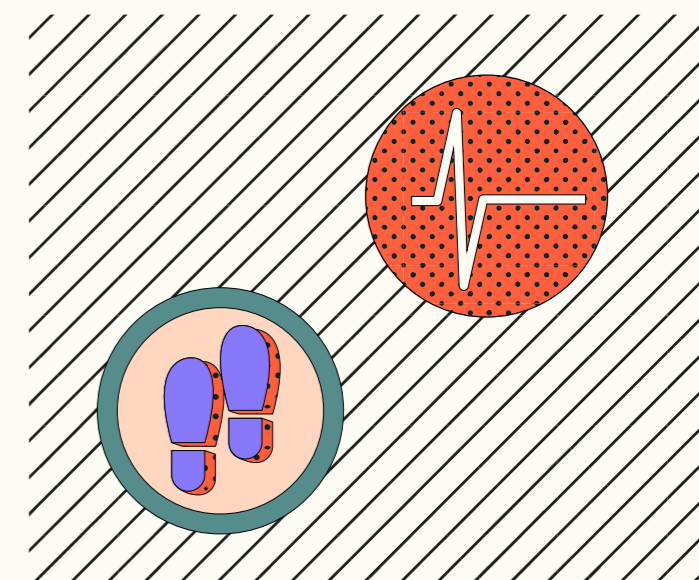
The Rise of Fitness Technology



From wearables to mobile fitness apps to cult-favourite Peloton bikes, the integration of technology into the fitness world is undoubtedly changing how consumers track, exercise and monitor their fitness results.

Technology helps solve problems that previously required considerable effort. For example, users can track workout sets, record weights lifted and measure body fat percentage and sleep quality, all within one simple and easy-to-use app.

Health and fitness apps are one of the few areas standing to benefit from lockdown conditions. Fitness apps, online workout subscription services, and fitness equipment sites have seen huge surges. Peloton's app saw a 400% increase in downloads this March in comparison to downloads pre-lockdown in February.



£409.6m

In the UK alone, wearables account for £409.6m market share in 2020, with a user penetration rate of 10%

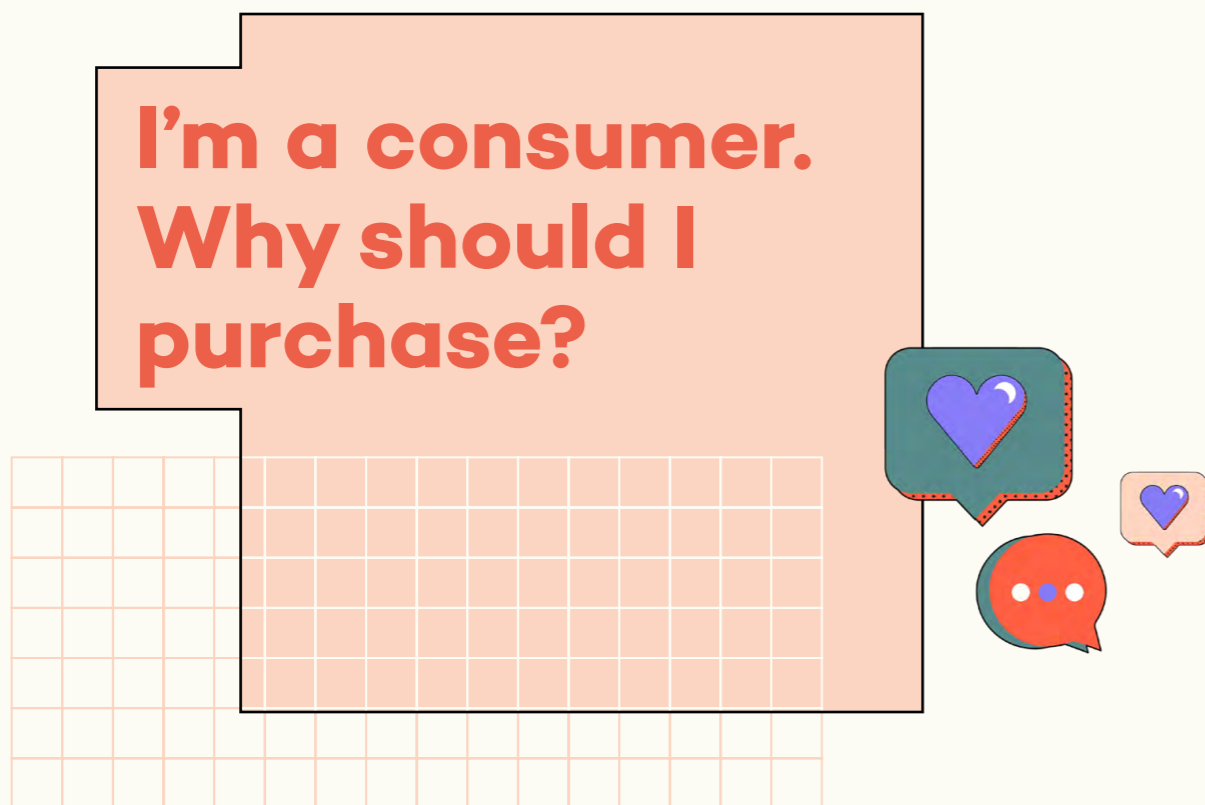
Changing lifestyles and an increasing awareness of health and nutrition makes this an arena ripe for disruption.

To capitalise, it's vital that fitness tech brands understand how to define,

£11.4bn

Looking further afield, the global fitness app market size is anticipated to reach over £11.4bn by 2026

segment and target audiences on social media. When done correctly, you can create insight-backed content that resonates with multiple personality types on an individual level.



Glad you asked. When marketing on social, you can generally categorise the customer journey into a three-stage funnel: awareness, consideration and conversion.

Awareness

Awareness campaigns are a top-of-the-funnel marketing outcome, executed with a view of capturing the attention of new potential customers. It's a useful strategy for start-ups that lack brand recognition or want to promote the launch of new products, and is particularly useful for brands to stay front of mind while their products or services are affected by the current climate.

Consideration

Consideration refers to an actively engaged consumer that is aware of your brand or product but hasn't made the decision to purchase yet. Perhaps they have liked your video on Facebook or follow your brand's page on Instagram.

Conversion

Conversion, on the other hand, is when a user decides to purchase. To understand more about what pushes customers over this illusive purchase line, we asked the public to list the top factors that motivate them to buy fitness tech products on social media.

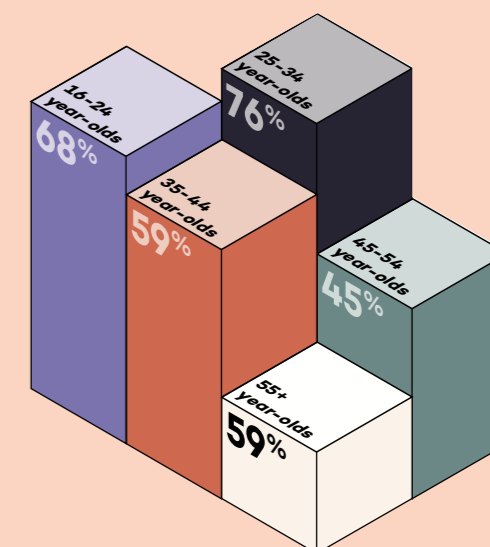
The results are fascinating.. Consumers are most motivated to buy health and wellness products on social media when:



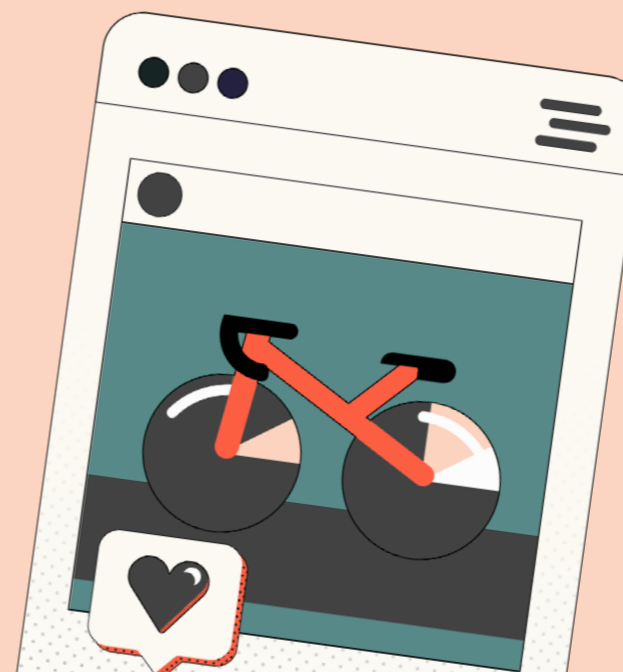
As this is a final stage conversion decision, it makes sense that people want a clear explanation of “the benefits of the product”. In short, giving it to people straight will help push them over the line.

For example, the proportions of consumers who have purchased a health/wellness product as a result of social media is as follows:

But it's worth noting that fitness tech purchases on social media tend to trend younger. Age plays a determining factor in whether or not someone has purchased a health and wellness product as a result of seeing something on social media.



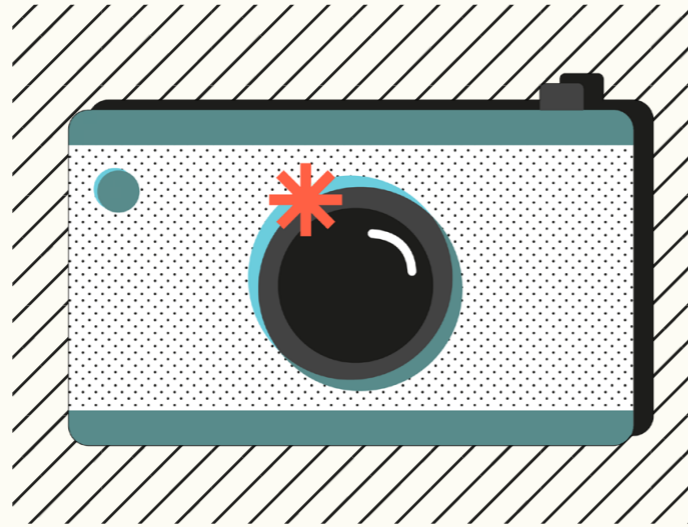
Clearly, younger generations with greater digital literacy and increased spending power are a key audience group for fitness tech brands to target.



Designing creative that packs a punch

Ultimately, the purpose of psychographic social is to design highly targeted and bespoke creative that packs a real punch.

Let's consider the following example. We have two women that both fit into the same demographic category. Both have the same interests, and share the same engagement history on social.



Both need the same creative, right?

Demographic:
Male | 25-30 years old | University educated

Interests:
Avid instagrammers | Loves art
Likes Beauty products

Engagement History:
Has expressed interest in Vogue before
Low level engagement on social media

Wrong. By targeting psychographically, we quickly see that wouldn't be correct.

<p>Makes emotional, impulsive decisions</p> <p>Scores low on our consumer stability index</p> <p>Is driven by social norms</p>	<p>Makes decisions rationally after seeing details and figures</p> <p>Scores high on our consumer stability index</p> <p>Is driven by individuality</p>
--	---

Today, the smartest and most innovative brands are using AI-based technology to unlock specific behavioural insights about individual personality types. These are all bespoke to your audience's personality profiles, and result in messaging and creative that is tailored to your customers' individual wants, values and needs.

<p>Suggested colours</p> <div style="display: flex; justify-content: center; gap: 10px;"> <div style="width: 15px; height: 15px; background-color: black; border-radius: 50%;"></div> <div style="width: 15px; height: 15px; background-color: purple; border-radius: 50%;"></div> <div style="width: 15px; height: 15px; background-color: darkpurple; border-radius: 50%;"></div> </div> <p>Suggested Imagery</p> <div style="display: flex; justify-content: center; gap: 5px;"> </div>	<p>Suggested colours</p> <div style="display: flex; justify-content: center; gap: 10px;"> <div style="width: 15px; height: 15px; background-color: cyan; border-radius: 50%;"></div> <div style="width: 15px; height: 15px; background-color: teal; border-radius: 50%;"></div> <div style="width: 15px; height: 15px; background-color: red; border-radius: 50%;"></div> </div> <p>Suggested Imagery</p> <div style="display: flex; justify-content: center; gap: 5px;"> </div>
--	--

You can identify and target specific audiences through paid media and influencers, developing creative that will explicitly appeal to audiences, increasing effectiveness and engagement.

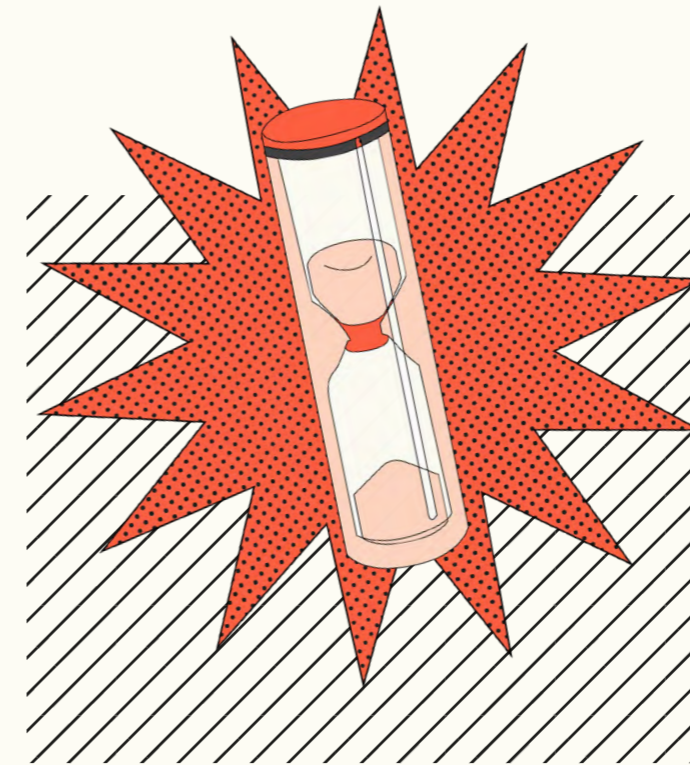
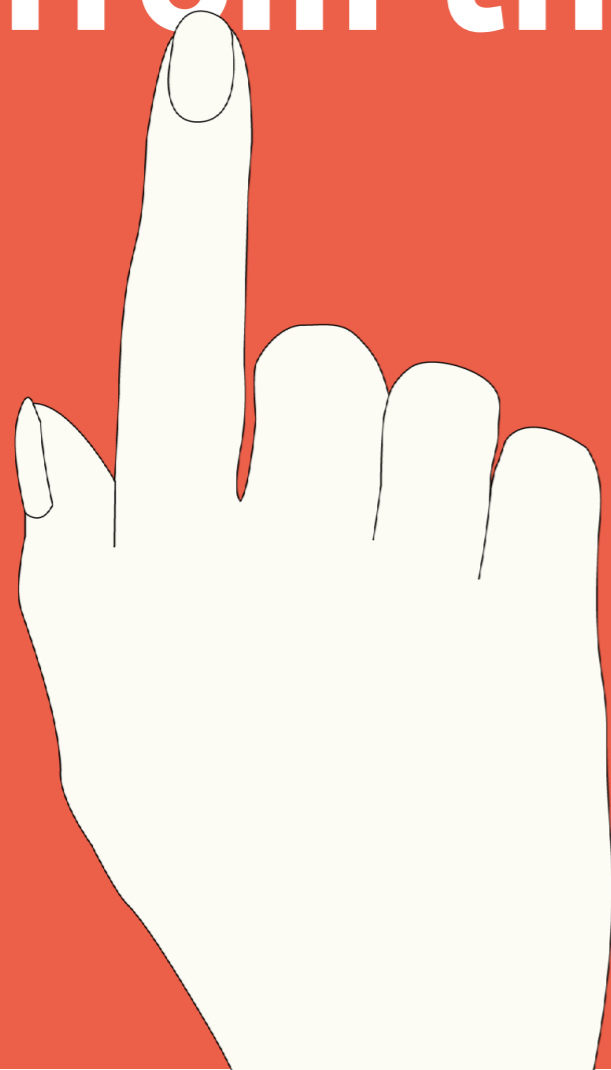
This activates a system 1 response, which means your creative is consumed, your message is received, and you drive the desired behaviour, resulting in a higher ROI.

The IPA recently produced a report showing exactly this: that system 1 advertising leads

to greater emotional brand association and stronger price elasticity over time. System 2 advertising, however, which is more rational, can have a quick impact on sales, but tends to decay very quickly.

IPA showed that a system 1 advertising strategy can result in long-term profitability over and above a system 2 campaign. When mapped over a three-year period, emotional system 1 campaigns were shown to drive 20% higher profit effects than rational system 2 campaigns.

5 What can we learn from this?



At Cubaka, we believe there are clear lessons that can help brands of all shapes and sizes win time with customers on social media.

Whether you're an FMCG food brand, a wearable tech company or in an entirely different field altogether, using behavioural insights to target individual psychographics pays tangible dividends online.

Let's consider some of the following real-world examples to bring these ideas to life.

Lesson1: Whole Earth – Motivate customers to achieve their goals

The Brief

Bring new customers into the brand by positioning Whole Earth Nut Butters as the perfect natural fuel for getting outside and enjoying autumn.

Consideration

As autumn sets in and winter approaches, it's harder than ever to motivate yourself to get outside and be active. Dark nights and cold weather lead to low motivation and a craving for comfort food. This provided a perfect opportunity to position Whole Earth as a comfort food to fuel a healthy outdoor lifestyle.

We collaborated with a variety of outdoor enthusiasts and foodie Influencers (from micro to macro) across key autumn months. Campaign activity included video production, events/experiences, photography and gifted product boxes. All demonstrating how Whole Earth Nut Butters are the perfect food to fuel your Autumn activities.

Results

Reach: 4.4m
Total Impressions: 5.3m
Total Engagements: 631k

Lesson 2: Clipper Tea – Use psychographics to target specific behaviours

The Brief

Use National Tea Day to reach & engage new consumers with Clipper’s tea credentials in a celebratory, light-hearted, joyful way.

Consideration

First, we needed to understand Clipper’s audience – what influences, triggers and drives them? During our behavioural and psychographic insights phase, we discovered that Clipper tea drinkers are an incredibly creative bunch. They love arts, crafts, writing, music, photography, plants and painting.

Our strategy aimed to reach a new relevant audience (without media spend). Collaborating with a variety of macro and micro crafty Influencers, such as Kirstie Allsopp and self-taught artists, we produced: two Facebook Lives with Kirstie, the recreation of Clipper’s logo cross-stitch, and a UGC campaign turning tea puns into song lyrics.

The influencers all shared photos of the creations with their followers, with Clipper tea fuelling their creativity.

Results

975% more engagement than always-on content
Reach: 1.1m
35% Engagement rate on Facebook Live with Kirstie Allsopp

Lesson 3: Virgin Active – Provide encouragement, not just equipment

The Brief

Virgin Active came to us with the goal of attracting new audiences and driving monthly gym memberships.

Consideration

First, we used in-depth data to gain vital behavioural and psychographic insights about Virgin Active’s audience. This helped us design a strategy targeting specific personalities with specific messages.

We discovered that Virgin customers weren’t motivated by tangibles such as machinery, opening hours or luxury touches. What they really needed was less tangible - encouragement and a personal touch. We used this insight to produce live content served in real-time to new audiences which spoke to the heart, not just the head.

Results

ROI of 3:1. The campaign drove three times more membership sign ups than it cost to produce.
363% uplift in engagement



In a world where attention is the most valuable commodity, do you have what it takes to win time with your customers?

Consumer habits post-COVID are going to be a combination of habits developed over the course of the past few years as well as habits acquired under lockdown.

At present, the threat of Coronavirus has taken away the sense of agency and control consumers have over their lives. Deciding what to spend money on provides them with a feeling of security and control.

Because of this, Dr. Erica Carranza, Vice President of Consumer Psychology at market research firm Chadwick Martin Bailey states that consumers are more likely to gravitate towards products and services that appeal to their core values and their sense of self. We believe Dr Erica, big time.

Combine this with the fact that Coronavirus has brought health and wellness as a whole front-of-mind, there has never been more opportunity - or competition - in the market.

For health and wellness brands looking

to succeed socially, remember this: to differentiate yourself in a crowded market, you need to win time with consumers by delivering intelligent, creative and data-driven social.

Success means being smart. The best brands push the boundaries of possibility on social – they stop ‘triggering’ and start ‘seducing’.

Stop triggering means stop posting the same thing to the same audience and expecting different results.

Start seducing means you need to map, plan and target. Use behavioural insight as the basis of your strategy to press the right buttons for the right audiences.

To win, you will need a large volume of highly targeted content that’s designed to appeal to people’s cognitive bias. And when you tap into vital behavioural and psychographic insight, you’re able to activate a strategy that speaks to your audience’s individual personalities.



Cubaka.

For anything you'd like to discuss
mentioned in this report please
contact Tom@cubaka.com