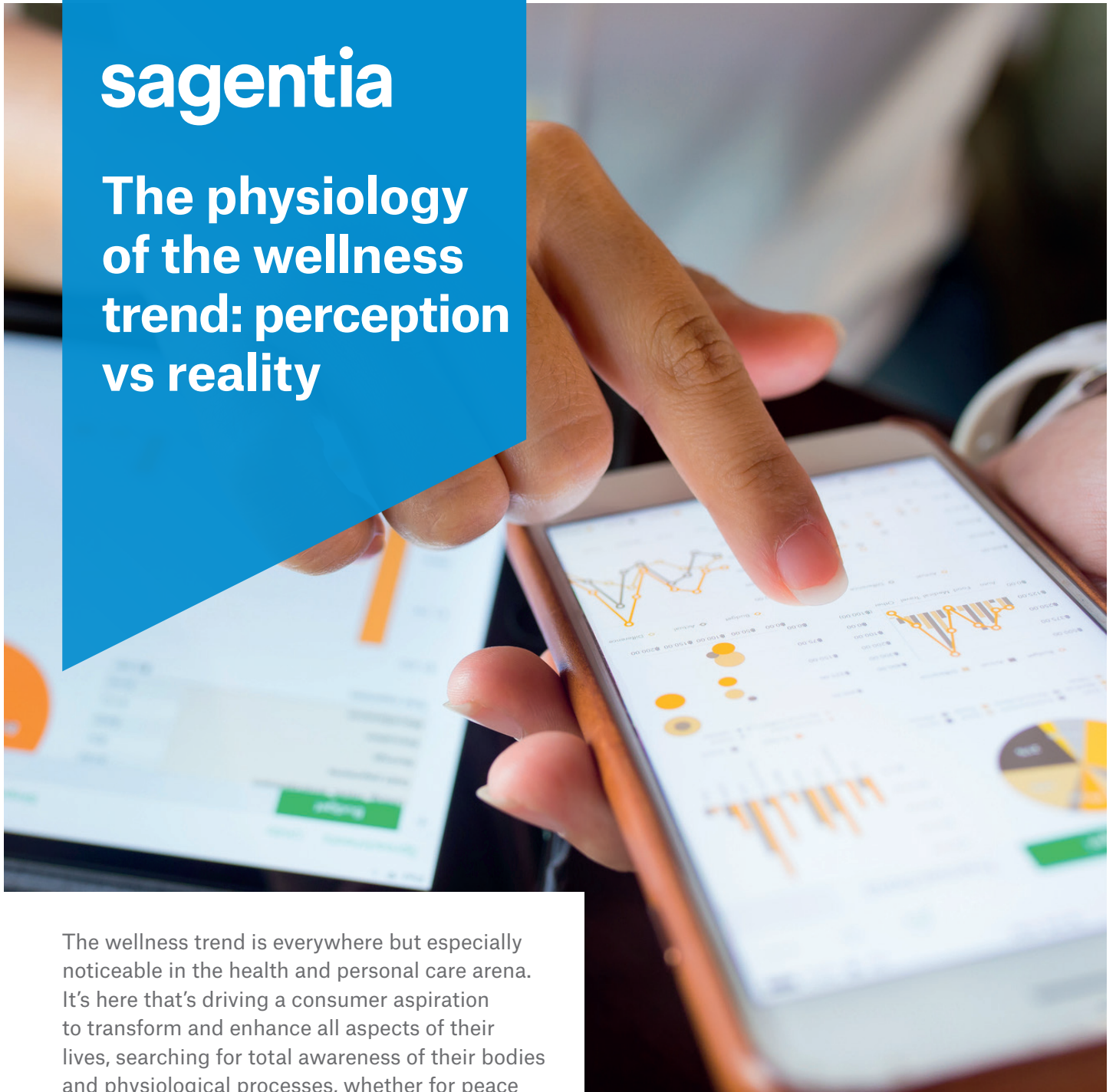


# sagentia

## The physiology of the wellness trend: perception vs reality



The wellness trend is everywhere but especially noticeable in the health and personal care arena. It's here that's driving a consumer aspiration to transform and enhance all aspects of their lives, searching for total awareness of their bodies and physiological processes, whether for peace of mind or physical improvement.

But where are the lines clear and where are they blurred between science and design and consumer perception – and does it matter? Equally, what is the level of science required for a 'real' diagnosis or to significantly change behaviour? When is data 'good enough'? And what is the driver behind tracking elements of wellness such as sleep or exercise?

The information we receive from consumer health and wellness devices is only as good as its context and often the 'so what?' is often missing. Quality and consistency is a challenge: a test on one health app clearly demonstrated that heart rate measurements can be changed simply by pressing a little harder on the sensor.

In addition, while an app may track sleep, does it help someone sleep better? Consumer perception may be that by having the information it does result in better sleep, but in reality, this is a health feature, rather than a benefit. This is explored in more detail in our thought leadership paper: [\*The pursuit of wellness: striking the balance between perception and proof.\*](#)

To shift to providing a clear health benefit, devices need to move into being more reliable, consistent and able to track and analyse more physiological symptoms and therefore provide context. But is this pushing them into the medical sphere with all its regulations and clinical tests. Is making a claim with a clear disclaimer enough; both for the company and the consumers?

Let's consider another example: many smartwatches on the consumer market are offering health monitoring and tracking as a key feature. This has expanded into claims of measuring ECG but does it really do this? Physiologically speaking an ECG measures and analyses so much more than just the heart beat and for this it requires specialist equipment that delivers consistency and pinpoint accuracy. The clinical validation results reflect use in a controlled environment. Real world use of the ECG app may result in a greater number of strips being deemed inconclusive and not classifiable.

But in the consumer health and wellbeing world, this might not be an issue. It's more helpful perhaps to ask: will people find it useful. If the answer is 'yes' then a 'maybe' response to the question, does it add value, might not matter.



As we understand more about physiology and its importance, especially in the consumer device market, we see how it is shaping the development of technology to address it. As a result, consumer engagement is also increasing as people like the direction and confidence such devices or apps can provide them: it literally makes them feel better, that they are doing something positive. Therefore, we can see that the perception of product claims can bring about a real peace of mind.

We believe that the future will see a point where enough credible and consistent data is collected from a number of sources to allow a reliable claim; it won't be 'medical grade' but enough to move the disclaimer. This is unlikely for purely consumer products but we're already seeing it in wearable devices that monitor and administer treatment for diabetics for example.

The accumulation of data is also a trend to watch and could point to a new direction for health and wellbeing in general.

Historical data recorded and stored is useful – and powerful – in showing patterns and trends and this can be incredibly useful; for the moment it's for the consumer but could it be more widely applied?

Could we see the likes of Google and Apple genuinely expanding its ecosystem into the health system competing with the likes of Philips who are already playing in this arena? Might they develop a guardian device, for example, that tracks and measures and is then used by medical professionals to review and diagnose quicker and more accurately, getting you the treatment you need without going through the traditional GP route?

Modern consumer devices have a level of technology and R&D outlay that would have been unpredictable in the past. To forecast future use and the blending of med-tech and consumer is challenging, although ultimately only consumer expectation will answer the question of "when is good enough, enough"?

At Sagentia we believe that an enduring and market leading product can only be delivered if positive consumer perceptions about its wellness benefits are grounded in clear and tangible scientific claims. We're exploring this new super-trend, looking under the microscope (often literally) at the proof behind the scientific claims, and finding the meaning and drivers behind the consumer's desires and appetite to change their lifestyle to achieve the wellness results they're aspiring to. You can read more in our latest thought leadership paper: [The pursuit of wellness: striking the balance between perception and proof.](#)

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