

THE COLLABORATION FOR HEALTHIER LIVES

COALITION OF ACTION

EXECUTIVE SUMMARY

DIGITAL SOLUTIONS FOR PREVENTATIVE HEALTH PLAYBOOK

THE CONSUMER GOODS FORUM

2024



KEARNEY



EXECUTIVE SUMMARY

This summary provides key takeaways from the playbook developed by [The Consumer Goods Forum \(CGF\)](#) Coalition for Healthier Lives (CHL) workstream to serve as a guide for designing digital solutions for preventative health and empowering self-care initiatives for consumers. The full playbook covers several toolkits to guide consumer goods manufacturers and retailers along their journey of building impactful initiatives around preventative health.

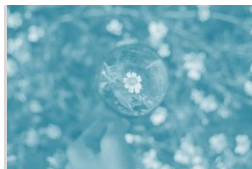
ACTION STEPS FOR YOUR BUSINESS'S PREVENTATIVE HEALTH JOURNEY



1

Drive Impact by Addressing Relevant Health Issues

Identify and prioritise relevant health issues based on your company's geographic footprint and prevalent (addressable) health issues in key markets.



2

Align Preventative Health Efforts with Your Business Model

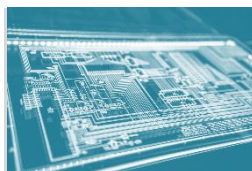
Define focus areas for Preventative Health interventions across physical health, mental health and hygiene, in line with business model and current offering



3

Connect with Your Local Consumers on Preventative Health

Design Preventative Health interventions addressing one or multiple touchpoints across the consumer journey and engage consumers with local campaigns



4

Leverage Technology to Drive Accessibility and Engagement

Identify and integrate technology solutions into Preventive Health interventions based on a defined focus area and consumer journey to amplify impact.



5

Scale for Impact on Preventative Health with Partners

Partner with startups and/or industry peers to collaborate on ecosystem solutions, co-create interventions and/or share preventative health learnings

IF YOU HAVE 10 MINS READ THIS...



Business Case, p. 11

How to Design Pilots, p. 15



Incentivizing Partners, p. 21

FORUM Healthier Lives

“At AS Watson, we believe that promoting preventative health is crucial to improve wellbeing for all.”

Malina Ngai, CEO
AS Watson
(Asia and Europe)

AS Watson

FORUM Healthier Lives

“As a Board Co-Sponsor of the CHL Coalition of Action I believe that, through CEO engagement and by coming together as manufacturers and retailers, we can help scale preventative health solutions.”

Brian McNamara, CEO
Haleon

HALEON
For Health. With Humanity.

01

DRIVE IMPACT BY ADDRESSING RELEVANT HEALTH ISSUES

- ▶ Health issues were prioritised based on the global member base of the CGF in terms of market presence and revenue (i.e., reach) and potential health impact (i.e., health equity). The list of countries identified are:
 - ▶ Brazil
 - ▶ China
 - ▶ India
 - ▶ Mexico
 - ▶ USA
- ▶ Due to the technical terminology of health issues, countries were further categorized and adjusted for consumer relevance. The three resulting categories include:
 - ▶ Physical health, e.g. physical pain, respiratory illness, viral diseases;
 - ▶ Hygiene, e.g. oral health, skin health, water-borne diseases;
 - ▶ Mental health, i.e., well-being, depression and anxiety.

Source: Kearney

SAMPLE



Further information in full Playbook

02

ALIGN PREVENTATIVE HEALTH EFFORTS WITH YOUR BUSINESS MODEL



KEARNEY

	MANUFACTURER								RETAILER	
	ORAL CARE	SKIN CARE	PERSONAL & HOME CARE	FEMININE CARE	CONSUMER HEALTH				FOOD	NON-FOOD
					Common Cold Remedies	Pain Relief	Vitamins & Supplements	Others ³		
Diabetes		✓	✓					✓	✓	
Lower Back & Neck Pain			✓			✓	✓			✓
Premenstrual Syndrome				✓		✓				✓
PCOD/PCOS ¹		✓		✓			✓		✓	
Nutritional Deficiencies	✓						✓		✓	
Digestive Diseases ²	✓		✓			✓		✓	✓	
Sexually Transmitted Diseases	✓		✓	✓			✓	✓		✓
Tropical Diseases (e.g., Dengue)			✓							✓
Obesity			✓				✓	✓	✓	
Periodontal Disease	✓							✓	✓	✓
Acne		✓						✓		✓
Skin Pigmentation		✓						✓		✓
Oral Issue (e.g., Cavities)	✓						✓		✓	✓
Cold, Cough & Flu					✓	✓				✓
Dermatitis		✓	✓					✓		✓
Photoaging (i.e., Sun Exposure)		✓						✓		✓
Fungal Skin Diseases		✓						✓		✓
Migraine/Headache						✓				✓

1. Polycystic Ovarian Disease/Polycystic Ovary Syndrome, 2. Food poisoning, traveller's diarrhea, etc., 3. Other Consumer Health categories include Dermatologicals, Digestive Remedies, Emergency Contraception, Weight Management & Wellbeing

Source: Kearney

CONNECT WITH YOUR LOCAL CONSUMERS ON PREVENTATIVE HEALTH

- ▶ To drive commercial impact, technological solutions can be activated across different stages of the customer journey, including:
 - ▶ Awareness & Education
 - ▶ Consideration
 - ▶ Purchase
 - ▶ Retention
 - ▶ Advocacy
- ▶ A selection of Preventative Health case studies along the customer journey illustrate the diversity and complexity of potential solutions for manufacturers and retailers across the world.
- ▶ When designing best-in-class initiatives, consider these six actions:
 1. Focus on general health issues;
 2. Ensure business alignment;
 3. Activate across multiple touchpoints, both digital and physical;
 4. Drive impact through partnerships;
 5. Integrate interactive tech solutions;
 6. Develop meaningful incentives.

Source: Kearney

SAMPLE

06

USE CASES & BEST PRACTICES

BUILDING ON TECHNOLOGY SOLUTIONS, 50+ CASE STUDIES WERE IDENTIFIED ACROSS MANUFACTURERS AND RETAILERS FOR PREVENTATIVE HEALTH INTERVENTIONS ACROSS THE CONSUMER JOURNEY

KEARNEY

SELECT USE CASES ALONG CONSUMER JOURNEY

Awareness & Education	Consideration	Purchase	Retention	Advocacy
Kruger ▶ Free telemedicine services line with budget and provider health concerns by a registered dietitian. ▶ Offering part of "Food to Medicine" platform promoting better nutritional food choices to drive overall well-being.	Walgreens ▶ Annual "Wellness Day" offering free health screenings (vital signs, glucose) at start of new school year in Walgreens pharmacies.	Walgreens ▶ Light Choice tool integrated in the CareWell app including: Nutri-Score-based nutritional and price information on 14,000+ products across 75 categories. ▶ Tool of "Suggested" feature based on recent purchase history offers product suggestions of similar nutritional value and/or at lower price.	Colgate ▶ Colgate Smile Club for members to earn rewards by brushing and/or whitening teeth or completing challenges to win discounts and prizes, e.g., glucometer as part of Colgate Diabetes challenges. ▶ Includes access to oral health tips and tricks.	Under Armour ▶ Under Armour loyalty programme UA Rewards with points earned for fitness challenges and challenges, e.g., in UA MyFitness App.
TESCO ▶ Partnership with Diabetes UK. ▶ Sample and free testing in Tesco pharmacies for men of type 2 diabetes.	Walmart ▶ "Shop-by-Order" scanning tool allows customers to determine if products meet certain health preferences like diets, allergens, interactions with medications and medical conditions. ▶ Includes healthful shopping tips, a "Health Mail" with wellness content and explanations of different diets.	Walmart ▶ Partnership with technology company Sifter.	L'ORÉAL ▶ "See Our Skin" campaign by L'Oréal-owned brand La Roche-Posay. ▶ Free skin cancer screenings at outdoor events and selected retail locations.	AS Watson ▶ AS Watson, a grocery shopping loyalty app offering point rewards that can be redeemed for gift cards or healthcare rebates in partnership with technology company Green Premaas. ▶ Healthy food rewards feature offering up to 4x points for purchasing fresh fruit and/or vegetables.

Legend: Online (O) In-store (I)

Notes: Includes OTC members and non-members.
 Source: Multiple sources: Diabetes UK, United States Diabetes Association, Colgate, Walgreens, Under Armour, MyFitness, Sifter, Walmart, L'Oréal, AS Watson, Green Premaas.

06

USE CASES & BEST PRACTICES

AS WATSON AND L'ORÉAL LAUNCHED AN AI-POWERED SKINCARE ANALYSIS TOOL, 'SKINFIE LAB'

KEARNEY

SKINFIE LAB

Creates highly personalised skincare product recommendations based on customers' selfies. Skinfie Lab has been built and validated using over 16,000 selfie images is able to detect a range of facial attributes from a customer's selfie.

PROGRAMME OFFERING

Personalised skincare product recommendations based on customers' selfies	Personalized, in-depth skin analysis generated
---	--

SIGN-UP

Seamless, online registration on *skinfie* or for questionnaire and selfie upload

Answer short questionnaire about customers' skin conditions	Take customer selfies using mobile phone or laptop	Receive detailed skin analysis and personalized skincare recommendations
---	--	--

Further information in full Playbook

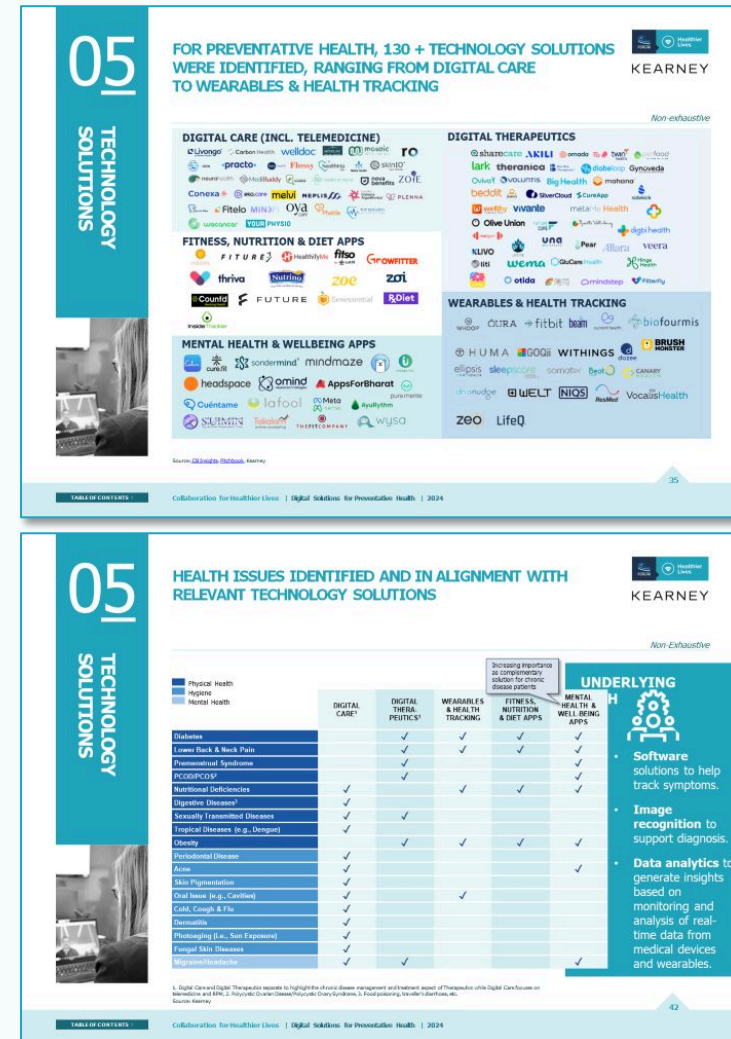
04

LEVERAGE TECHNOLOGY TO DRIVE ACCESSIBILITY AND ENGAGEMENT

- ▶ In total, 130+ Preventative Health technology solutions were identified and categorised into five clusters¹:
 1. Digital Care (incl. Telemedicine);
 2. Digital Therapeutics;
 3. Fitness, Nutrition & Diet Apps;
 4. Mental Health & Wellbeing Apps;
 5. Wearables & Health Tracking.
- ▶ An assessment of the ease of implementation and cost implications helps to identify and select the appropriate solution for preventive health interventions, given the varying complexity of the technology methods identified.
- ▶ A guiding map illustrates technology solutions suitable to address identified health issues in line with the business model and category focus.

1. Digital Care and Digital Therapeutics separate to highlight the chronic disease management and treatment aspect of Therapeutics while Digital Care focuses on telemedicine and RPM
Source: Kearney

SAMPLE



Further information in full Playbook



HOW TO SCALE FOR IMPACT ON PREVENTATIVE HEALTH WITH PARTNERS

Non-Exhaustive

Leverage Collaborative Approaches



- ▶ Different forms of collaboration such as **co-development, co-investment or international partnerships** help in scaling by enabling companies to leverage each other's **strengths, resources** and **networks while reducing financial risks**.

Allow Room for Adaptation



- ▶ While select Preventative Health interventions might be **applicable to multiple consumer groups across countries or regions**, relevant solutions should be adapted for the **cultural context** and **level of technology advancement** in the local market.

Develop Shared Infrastructure and Common Platforms



- ▶ Select technological solutions require consumers to access the same or similar information on an ongoing basis, so the creation of a single shared platform, system or infrastructure to support activities across consumer groups can both reduce costs and promote consistency.

Source: Kearney

ABOUT THE CONSUMER GOODS FORUM

The Consumer Goods Forum (CGF) is a global, parity-based industry network that is driven by its members to encourage the global adoption of practices and standards that serve the consumer goods industry worldwide.

It brings together the CEOs and senior management of some 400 retailers, manufacturers, service providers, and other stakeholders across 70 countries, and it reflects the diversity of the industry in geography, size, product category and format. Its member companies have combined sales of EUR 4.6 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. It is governed by its Board of Directors, which comprises more than 55 manufacturer and retailer CEOs.

For more information, please visit:
theconsumergoodsforum.com



ABOUT KEARNEY

Kearney is a leading global management consulting firm with more than 5,700 people working in more than 40 countries. We work with more than three-quarters of the Fortune Global 500, as well as with the most influential governmental and non-profit organisations.

Kearney is a partner-owned firm with a distinctive, collegial culture that transcends organisational and geographic boundaries — and it shows. Regardless of location or rank, our consultants are down to earth, approachable, and have a shared passion for doing innovative client work that provides clear benefits to the organisations we work with in both the short and long term.

For more information, please visit:
www.kearney.com

KEARNEY

theconsumergoodsforum.com

