

The background of the central section features a dark green overlay with silhouettes of three people walking away from the viewer on a beach. The person on the left is an adult, the middle is a taller adult, and the right is a child. They are holding hands. The text is overlaid on this image.

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Reframing well-being

How consumers' attitudes to
wellness are changing

Future Perspectives are thought-pieces with concise, focused insights into important issues of interest to marketing and business strategists.

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Reframing well-being

During the middle of the last century, there was a fundamental shift in the way we think about total health. It moved from eradicating disease to achieving multi-dimensional well-being.

Yet healthcare systems still focused more on sickness. The result, ever since the World Health Organization's (WHO) radical redefinition of health in 1948 as 'complete physical, mental and social well-being', has been a tension between intent and delivery.

The WHO's ambition has become an orthodoxy, but its 1948 vision means the majority of us would be classified as unhealthy most of the time.

The pressures of modern living make complete mental well-being impossible at times, even though we may



World Health Organization

be in peak physical condition. Those with chronic conditions such as diabetes would fail on physical health, even though they may be in control of their condition, and mentally and socially well.

The alternatives acknowledge instead that people do not expect to have it all when it comes to well-being. They do, though, want to have control and agency over its various dimensions, physical, mental, emotional and spiritual, in order to cope with the pressures of everyday life.

With this in mind, this Future Perspective identifies four high-level global themes that will have a critical influence on consumer attitudes to well-being and the approaches that these open up for companies.

The four themes are:

1. Reframing mental health
2. Search for new solutions
3. Coping with risk
4. Securing the future

Global improvements



There have been significant improvements to well-being globally: health is one of the good news stories when it comes to global trends. The health baseline is being raised by improvements to medication, vaccination and access to healthcare. Polio is close to being eradicated and in 2010, Morocco and Turkmenistan were declared malaria-free.¹

Mental health stigmas are being challenged, with the WHO's Mental Health Gap Action Program establishing projects in developing countries.² Technology is increasing access to well-being advice. Scientific advances are enabling people to live better quality, longer lives.

Alongside these structural and scientific developments,

people are taking more responsibility for their own health and well-being. A growing realization that healthcare systems may not be able to cope, together with the growth of online information, means that consumers increasingly recognize the need to prioritize well-being.

Barriers to well-being

Despite this progress, there remain substantial barriers preventing consumers from optimizing their well-being. Some threats feel closer to home, embedded within daily family life, while others feel further away, coming from the environment and from world events.

The pressures of urban life are taking their toll on mental and emotional health. Emerging markets are adapting to the often stressful lifestyles necessary to sustain economic growth. Modern lifestyle choices are also affecting physical health. Non-communicable diseases (NCDs) such as heart disease and diabetes are the single biggest cause of global deaths., with low- to middle-income countries being the most affected.³

Demographic change is starting to impact consumers. Only 11% of the world population was aged 60+ in 2010, but by 2050 this will have doubled to 22%.⁴ Age-related diseases are

creating financial pressures for governments. Consumers are increasingly aware that they may need to provide for themselves in old age, particularly in developing markets, where economic growth is disrupting family support networks.

Threats from the physical environment are becoming more tangible. In China, India and Brazil, consumers living in rapidly growing cities are coping with air pollution on a daily basis. There are also concerns about toxicity levels in food and water, particularly in China where 70% of rivers and lakes are polluted.⁵

Global volatility is also making consumers feel increasingly unsafe, with 62% of consumers globally agreeing that: "The world I live in feels like an increasingly hostile and uncertain place."⁶ Economic instability is causing global concern, and often leads to family crises and even breakup.

Only 46% of people globally are satisfied with their emotional well-being in 2011, compared to 54% in 2010

This is particularly stark in rapidly industrialising markets: China has fallen from 75% to 59%



1. Reframing mental health

Engagement with mental and emotional well-being is creating a more self aware society

Mental and emotional health is continuing to climb the health agenda as a result of initiatives from global health organizations and governments, as well as citizen and consumer responses to health challenges. The WHO's Mental Health Gap Action Program was founded in 2002, when 75% of those living in low- to middle-income

countries did not receive adequate mental health provision. By 2011, it had established programs in China, India, Georgia and Cameroon to address issues such as epilepsy, schizophrenia and depression.⁷ National governments also appear to be focusing more on mental health issues. In 2011, for example, the UK government published 'No health without mental health,' a mental health strategy which seeks to erode stigmas.⁸

The impetus for better mental health, however, is also coming from consumers. More pressured working lives are prompting consumers to try to keep time for self and family to help preserve mental and emotional well-being.⁹ The stigma surrounding mental health is also being eroded by high-profile figures talking in public about their own experiences. In January 2012, Antonio Horta-Osario, the Spanish chief executive of the British bank LloydsTSB, spoke about overcoming anxiety and sleep deprivation in order to

return to work, making it more acceptable for high fliers, and others, to address mental health issues.¹⁰

The economic benefits of self-awareness are also being acknowledged by employers, who are starting to connect mental well-being in the workplace to greater productivity and lower staff turnover. This is evident in emerging and developed markets. India's largest software firm, Tata Consultancy Services, provides a certified counselor in every center as well as free staff training in yoga and meditation.^{11,12}

“Health is wealth. And well-being is super wealth! Healthy body and healthy mind = stress free. You can't have one without the other”

Indian consumer



Image source: Ho/Reuters

“CEOs are people like everyone else. We all have our own individual situations. People should tackle problems they have head-on.”

Antonio Horta-Osorio, the Lloyds boss signed off with stress

But there are still a number of barriers which inhibit engagement with mental and emotional well-being. Economic deprivation correlates with increased risk of mental illness.¹³ Lack of access to information is a barrier for many, particularly in rural developing economies such as India, where only 25% of the population have access to Western medicine.¹⁴ Stigmas persist about mental health. And social change in Western markets also influences mental health. According to

a 2011 study, the number of men with depression will rise because of socio-economic change and shifting gender roles.¹⁵ Yet men remain less likely to seek professional advice for mental health issues than women. Social and economic change, in other words, is pulling both ways on mental health.

Implications:

New products and approaches: It's not yet clear if increasing self-awareness will socialize well-being or lead to a more insular focus as individuals focus on their personal needs. But in either scenario, consumers will be looking for products and solutions that help prioritize their mental well-being.

This is potentially a rich area for companies and brands, with the emergence of an entire industry focused on mental well-being. Brands can help reduce the stigmas associated with mental health. At the same time, though, employees will have higher expectations of their workplace and their employer's attitude towards mental well-being.



2. Search for new solutions

The desire for flexible approaches to well-being is creating a new language for it

Consumers are becoming more flexible about their approach to well-being. Increasing access to information and the proliferation of health and well-being applications and websites is raising expectations of choice. Health-engaged consumers are likely to investigate their own approaches to well-being alongside those suggested by healthcare professionals.¹⁶

One expression of this is a cross-cultural exchange of knowledge about methods and ideas between East and West. Globalization means that approaches to well-being adapted from other countries and cultures are changing social norms. This is a two-way exchange. In Western markets, complementary and alternative medicine (CAM) has grown in popularity in recent years. In the UK, 6 million people used CAM last year, with 30-40% of cancer patients opting for alternative therapies.¹⁷ Eastern markets are also more receptive to Western medicinal practices.



Image source: http://www.investors.com/image/IT_110513.jpg cms

In South Korea, extensive state investment in Western medicine means that people are comfortable choosing Western medicines rather than Korean remedies, or using traditional and Western medicines together.¹⁸

The exchange of information between healthcare systems may accelerate the progression of both Western and Eastern practice. In India, the lack of controversy surrounding the manipulation of human embryos has facilitated rapid growth in stem cell research, with the US outsourcing Phase II trials there.¹⁹ Similarly, the

research into CAM in Western markets is creating a scientific case for its application. In 2011, the National Center for Complementary and Alternative medicine in the US launched a web resource of evidence-based information aimed at healthcare providers.²⁰ In Europe, CAMbrella was founded in 2010 as an EU-funded academic research network tasked with creating a roadmap for future European research into CAM. The roadmap is due to be released later this year.²¹

Ultimately, we may see the emergence of hybrid global

41% of consumers prefer to do their own research on an illness or condition rather than rely solely on what healthcare professionals say

approaches to health. A new global language around healthcare could reframe the way we think about well-being that encompasses both preventive and curative frameworks. We are seeing early signs of this in the United States, with the continuing development of integrative medicine, which has been acknowledged by the government.²² In Britain Bupa health insurance provides alternative therapies as an option on their policies.²³

Local and cultural context will inevitably affect this trend. In Russia, where state investment in Western medicine has been poor,

people remain heavily reliant on traditional practices, with more faith healers than trained healthcare professionals.²⁴ In India, the cost of providing Western medicine to a 70% rural population inhibits its integration with traditional practices.²⁵ Even in markets such as China, where Western and Chinese medicine have coexisted for more than 200 years, there is little sign of integration.²⁶ While much of the growth in CAM comes from US and Europe, skepticism remains dominant. More evidence of the efficacy of CAM will be needed for this skepticism to be eroded.

Implications:

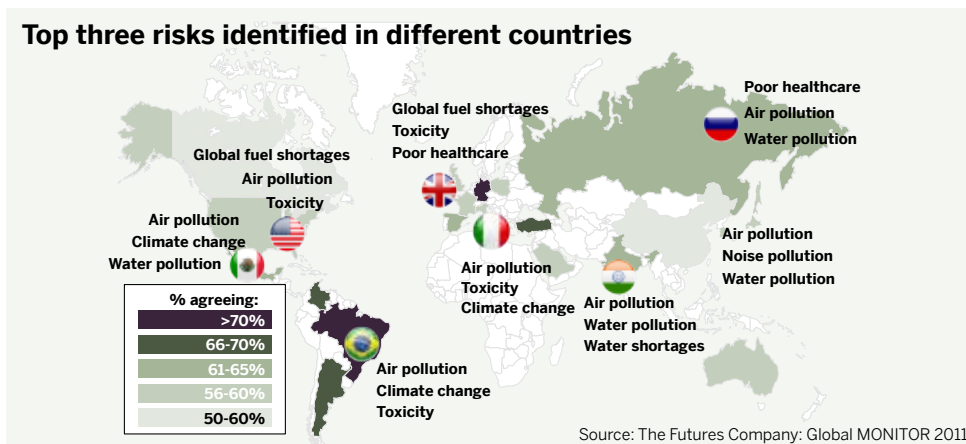
Continuing global spread of healthcare approaches will increase consumer choice but will also add complexity to an already busy space. The transfer of knowledge and skills will open up opportunities for the private sector. Expect more health tourism as the market fragments around centers of excellence.

In the short term, the wider range of approaches will need providers to help consumers to manage complexity and develop trust in new methods. Longer term, the emergence of a new language around health and well-being could reframe the way we think about disease, creating a framework and terminology that encompass both preventive and curative perspectives.



3. Coping with risk

The need to manage risk is being met by data from the physical environment



Consumers all over the world are concerned about the impact of external risk, and feel unable to protect themselves from factors such as air pollution, toxicity and disease epidemics. This is particularly evident in emerging markets, where rapid growth means the physical environment has changed dramatically. The heat map indicates the extent to which consumers are conscious of the need to manage risk. In emerging markets such as Brazil, the top concern is air pollution and fears of respiratory problems. The risk from water pollution is a concern

in China and India, where sewage and industrial waste are contaminating supplies. As we discussed in our recent Future Perspective, China's Challenges, this issue has been particularly toxic in China, where there have been several food contamination scares.²⁷

In the future, we expect the combination of digital technology and the physical environment will help consumers to manage risk. The spread of sensors will play an important role in collecting and disseminating well-being information. Tiny devices will

be attached to objects in the environment, identifying them through a unique IP address, and communicating with each other and with devices such as mobile phones or computers. (See our Future Perspective on Technology 2020 for more on sensors.)

This data network could mitigate health risks in both external and internal environments. In 2011, in Salamanca, Spain, air pollution sensors were installed in the city to monitor air pollution and identify areas of traffic congestion.²⁸

Such air pollution data could be open to consumers.

IKEA's vision for the kitchen of the future demonstrates the hygiene potential inside the home²⁹ The self-cleaning work surface will issue alerts about germ hotspots. A "Smart fridge," similar to the LG model launched in January 2012, will use sensors to identify when food has expired.

The well-being benefits of data will be realized in three ways: at individual, community and national levels. Health-engaged consumers are already using personal data to monitor physical fitness and stress levels through mobile applications. By 2015, an estimated 500 million people worldwide are expected to be using mobile healthcare applications.³⁰

The benefits of sharing community data are also emerging. An early example is the development of Pachube, an open source web-based service that allows users to build applications to share

data from their physical environment. The network helped to manage the radiation effects from Japan's Fukushima nuclear power station, damaged during the 2011 earthquake.

The most significant role for data in reducing risk will be at a national and global level. Google has discovered that searches for terms associated with the word "flu" are a good early indicator of 'flu viruses at regional and national level.³² Environmental sensors are involved in early-warning systems for disease epidemics. These data will be used to anticipate risks and to inform response strategies.

However, the spread of data may be patchy. The deployment of sensors may be driven more by commercial applications where anxiety is greater than the health risks than by public health needs. Sheer volume and potential inconsistency of data may overwhelm consumers already struggling to navigate health information.

Implications:

We expect that mobile apps and 'smart' devices in homes will play an increasing role in day-to-day management of well-being. Consumers will potentially be able to use real-time data as a tool for risk management, helping them to feel safer and more in control. It may also become easier to manage conditions where physical factors play a role, such as asthma; this could reduce pressure on healthcare systems.

There are opportunities for brands to develop data collection and visualization tools that interact with the physical environment, becoming the human face of data. Consumers may want guidance in navigating and interpreting the volume of data that becomes available. Companies may also become the bridge between the public sector and consumers, providing investment while translating the well-being benefits of data to consumers.



4. Securing the future

Fears for the well-being of future generations are driving a move towards accountability

One of the strong emerging issues we see is a renewed interest in inter-generational equity and inter-generational transfer. This has some interesting, if complex, implications for health and well-being. The emergence of lifestyle diseases such

as obesity, heart disease, and diabetes—in emerging markets as well as the developed world—mean that the long period of improvement in health outcomes could be reversed and children may die at a younger age than their

parents. The response of Mexico to this has been characteristic: in April 2010, the country banned junk food in schools to tackle childhood obesity and launched a high-profile campaign to raise awareness.³³

The global economic crisis is also causing parents to fear for the prospects of the Millennial generation. Youth unemployment has reached unprecedented levels in many developed economies, with half of Spain's under-24s now out of work.³⁴ This presents its own problems. Research shows that experience of joblessness in early life has effects on self-esteem and mental health throughout later life.³⁵ Emerging economies present their own challenges. In China, stress levels are rising among the young. Studies of adolescents suggest a third of urban schoolchildren suffer from psychological stress.³⁶

There are, however, signs of change. Current generations are starting to acknowledge



“I worry for my daughter. She will have to face lots of pressures that we did not have to cope with.

Financially it will be hard for her. We are planning to provide for ourselves when we get older, as I do not want to be a burden to her.”

Indian consumer

the need to bestow a legacy that benefits future well-being. In a 2011 UK poll, 46% of people felt that is most important to leave behind a healthy planet.³⁷ There is also increasing emphasis within emerging economics thinking on the need to be more responsible about the welfare of future generations.³⁸

This is where well-being meets public health. Urban planning forms part of the drive, with a new emphasis on urban environments

which encourage well-being (trees, for example, have a surprisingly beneficial effect). Other signs of accountability can be detected at a government level. In May 2008, the Hungarian Parliament elected to a six-year term the first Parliamentary Commissioner for Future Generations.³⁹ There is a growing movement supporting proposals for a UN High Commissioner for future generations, to influence the future of well-being for the generations to come.

Implications:

Well-being as activism: Expect the fair trade and sustainability agendas to broaden to include a dimension about future and present well-being, in particular looking at the incidental effects of materials and other packaging and logistics decisions on current and future health.

Companies, therefore, will be subjected to an additional level of scrutiny that assesses the impact of their decisions, actions and products on future generations. But brands can also be partners here: this is a rich territory for companies to innovate and communicate, to facilitate consumer participation and to strengthen brand positioning.

Conclusions:

1. From healthy choices to lifestyle choices

Consumer engagement with well-being will continue to increase, but within the context of lives that are already overloaded. Well-being approaches will succeed if they can be incorporated simply into daily life and have easily understood benefits.

We are seeing the emergence of a Well-being Generation which will expect products and services to deliver well-being benefits as well as functional benefits. These expectations will also transfer to living and working environments. Expectations of employees will increase and living environments will be influenced by a well-being agenda.

2. From responsibility to accountability

There is increasing awareness that the well-being of future generations depends on the decisions we make now. Expect people and companies

increasingly to be held to account by governments for the negative impacts of their health-related actions, including long-term effects. Government legacies will be judged on current and future impacts. The upside for the private sector is an opportunity to play a significant role in shaping consumer understanding and attitudes.

3. From fragmentation to cohesion

The well-being market is currently characterized by difference and fragmentation. There is still significant variation in attitudes to well-being around the world. But boundaries are blurring. Health systems will absorb knowledge and cultural practice from around the world, although this will create adaptive challenges. There will also be increasing competition over models and metaphors about wellness: there's already evidence that dominant cultural models about health and wellness are changing as countries

become more exposed to different approaches. (See our newsletter, FutureProof 3, for more on the mental models of well-being.) This also creates opportunities for product and service innovation. The biggest opportunity is in helping consumers to navigate the complexity of this landscape.

4. From niche to mass?

The biggest challenge to realizing the benefits of investment in the well-being space will be inclusivity. The mindset that we have explored in this Future Perspective is predominantly those of health-engaged consumers who seek actively to improve their well-being. However, there are still billions of consumers worldwide who are unable to engage due to economic, social or physical circumstances, poor access to information, or lack of motivation. The biggest winners in this space will be those that create mass approaches that drive much broader engagement with well-being.

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