

AGENDA

INTRODUCTION

Jennifer Hubber, Head of Ipsos Global Client Organisation

ARE WE OK?

Simon Atkinson, Chief Knowledge Officer, Ipsos Helena Junqueira, Social Intelligence Lead, Ipsos in Brazil

HEALTHY CONVERSATIONS?

Laïla Idtaleb, Global Head of Client Activation, Social Intelligence, Ipsos

WHAT TO EXPECT NEXT?

Reena Sooch, Head of Digital & Connected Health, Ipsos







ARE WE OK? Four reports to draw on











STARTING WITH NEW IPSOS ESSENTIALS DATA





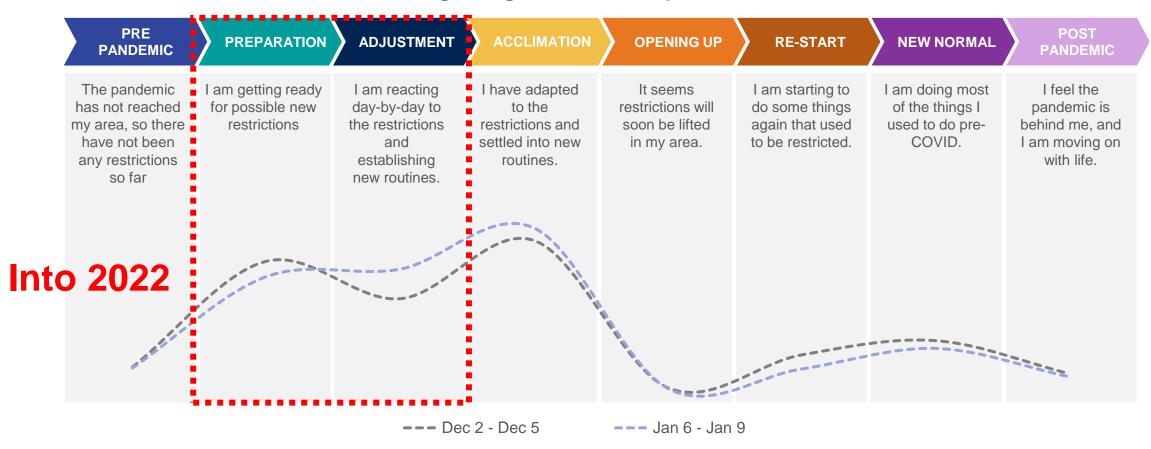






THE PHASES OF THE PANDEMIC - SELF ASSESSMENT

"Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?"



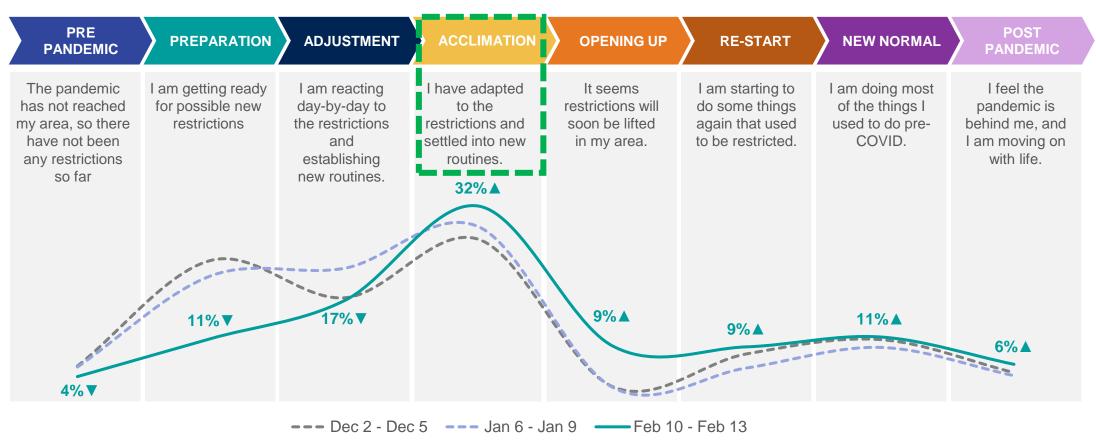
Q. Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic? Base: Dec 2 - Dec 5: 11518, Jan 6 - Jan 9: 10515,



[▼] or ▲ indicate change vs. previous wave (statistically significant @ 95% C.I.)

FEBRUARY 2022: IS THE WORST BEHIND US?

"Which one of the following phases do you feel best describes your current situation regarding the COVID-19 pandemic?"



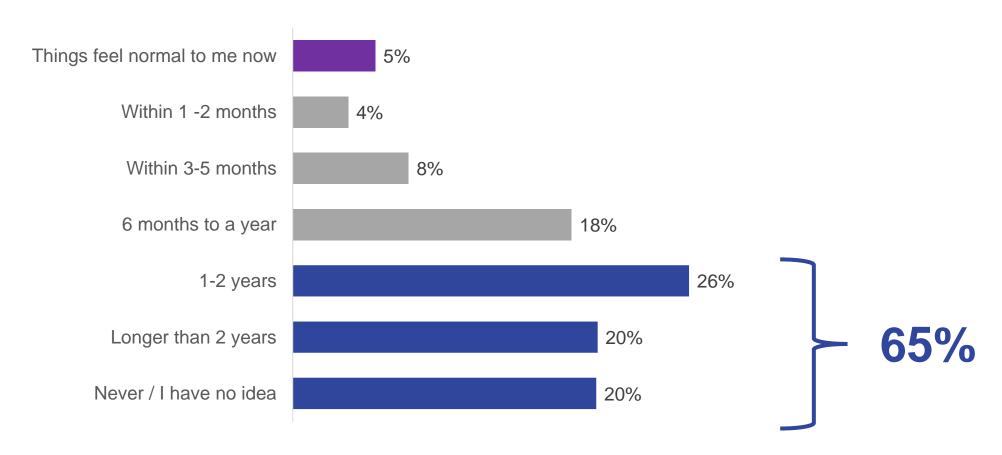
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RETURN TO NORMAL: JANUARY 2022

Timeline to Normalcy

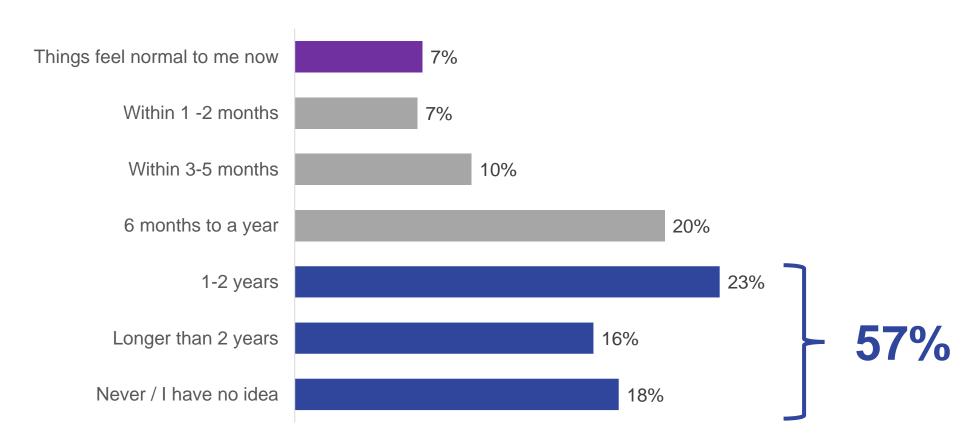


Q: How long do you think it will take before things feel like they are getting back to normal? Base: Global Country Average:10515



RETURN TO NORMAL: FEBRUARY 2022

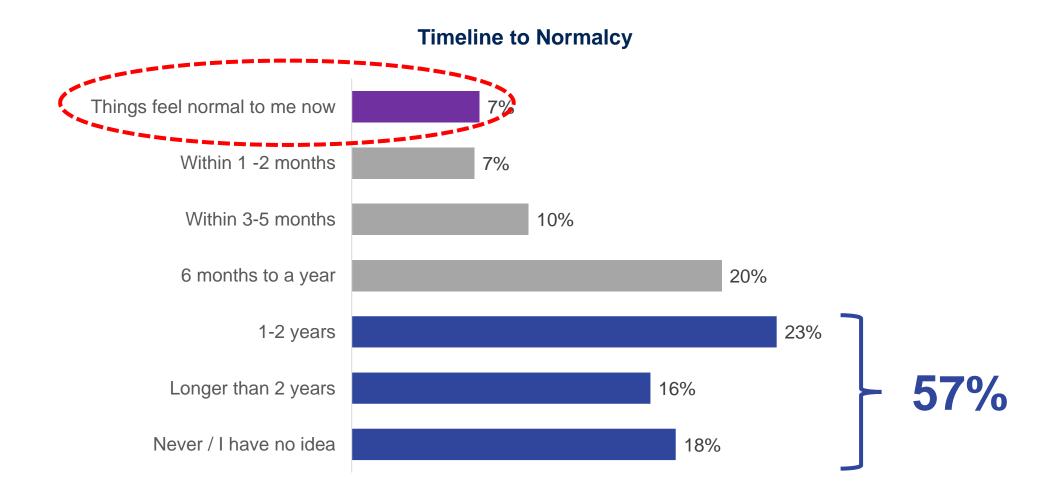
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RETURN TO NORMAL: FEBRUARY 2022



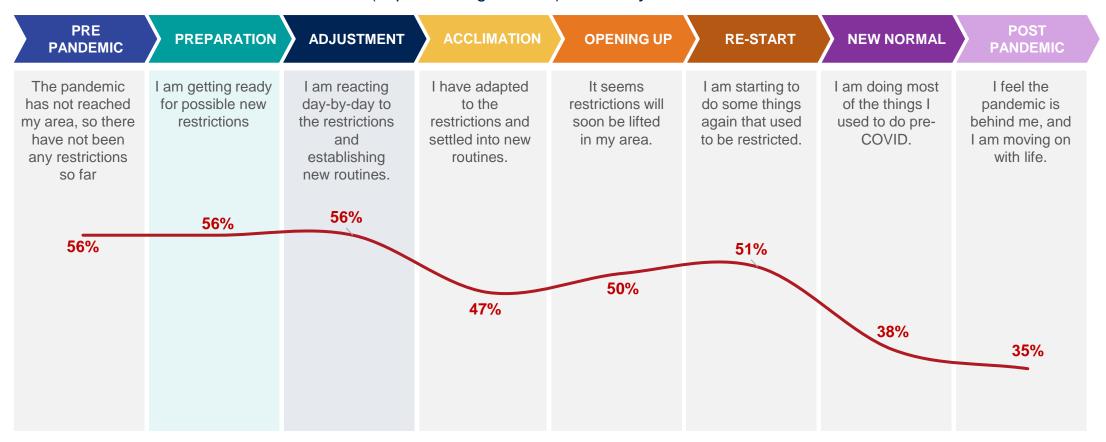
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THE LANGUAGE OF HOW WE FEEL - BY PHASE

"How much do you agree or disagree with the following statements?"

(Top-2 Box Agreement) – January 2022 data



—I am feeling stressed

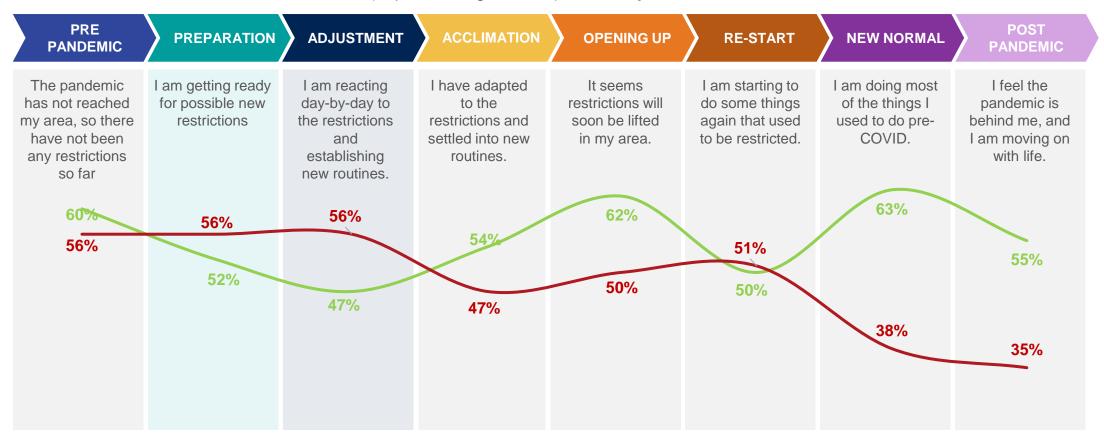
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THE LANGUAGE OF HOW WE FEEL - BY PHASE

"How much do you agree or disagree with the following statements?"

(Top-2 Box Agreement) – January 2022 data



—I feel good, both physically and mentally

—I am feeling stressed

Q. How much do you agree or disagree with the following statements? Base: 10515





THE PANDEMIC HAS TAKEN ITS TOLL

79% of people around the world now say their mental health is as important as their physical health

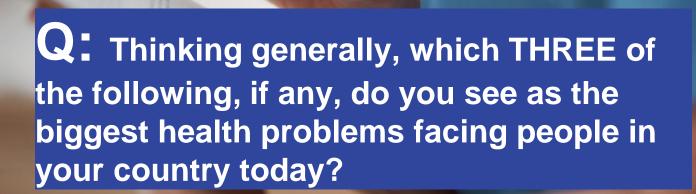
THE PANDEMIC HAS TAKEN ITS TOLL Perceived vs. experienced importance of health Equally important Mental health more important Physical health more important Don't know/did not answer in Thinking of your own health, do you think mental or physical health is more important? How are mental health and physical health treated in your country's healthcare system? 21,513 online adults in 30 countries, August 20th – September 3rd 2021. The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

IPSOS GLOBAL HEALTH SERVICE MONITOR

A 30-country survey

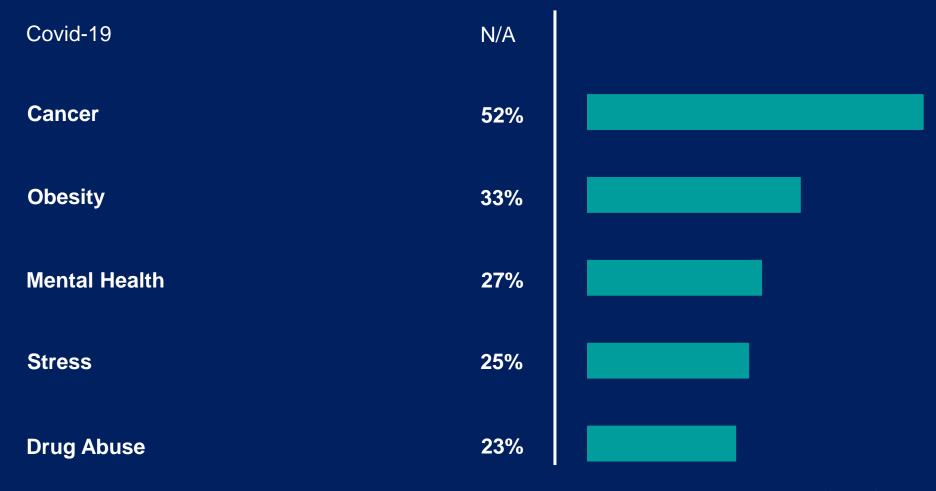
October 2021

Download here



HEALTH PROBLEMS: GLOBAL OVERVIEW 2018 May 25 - June 8

[ISSUE] is a top three health problem in my country (Global country average)





HEALTH PROBLEMS: GLOBAL OVERVIEW 2020

September 25 – October 9

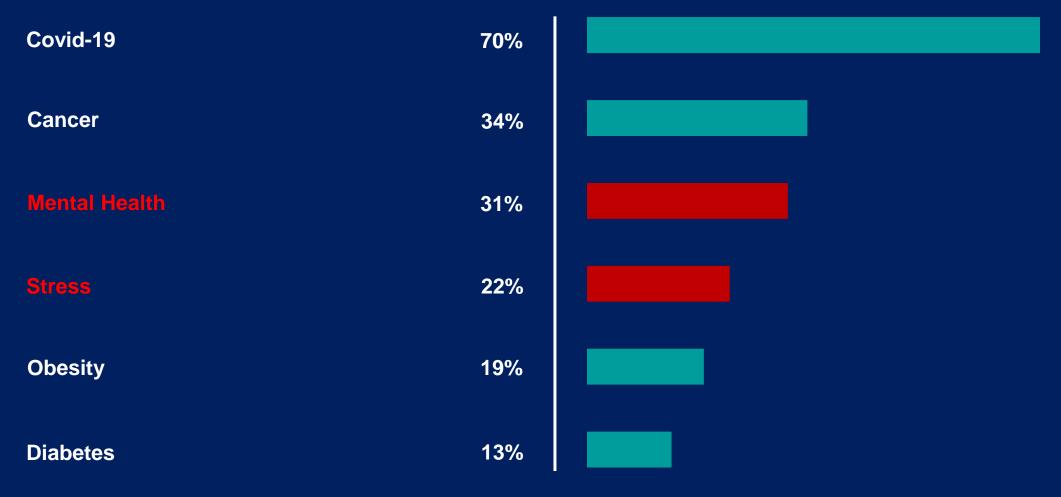
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HEALTH PROBLEMS: GLOBAL OVERVIEW 2021 August 20 – September 3

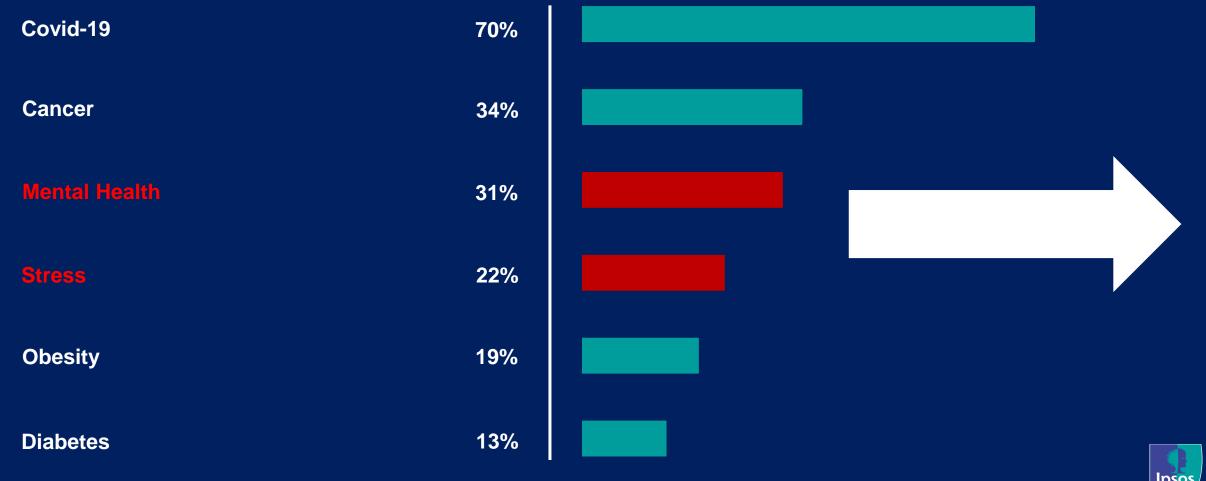
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HEALTH PROBLEMS: GLOBAL OVERVIEW 2021 August 20 - September 3

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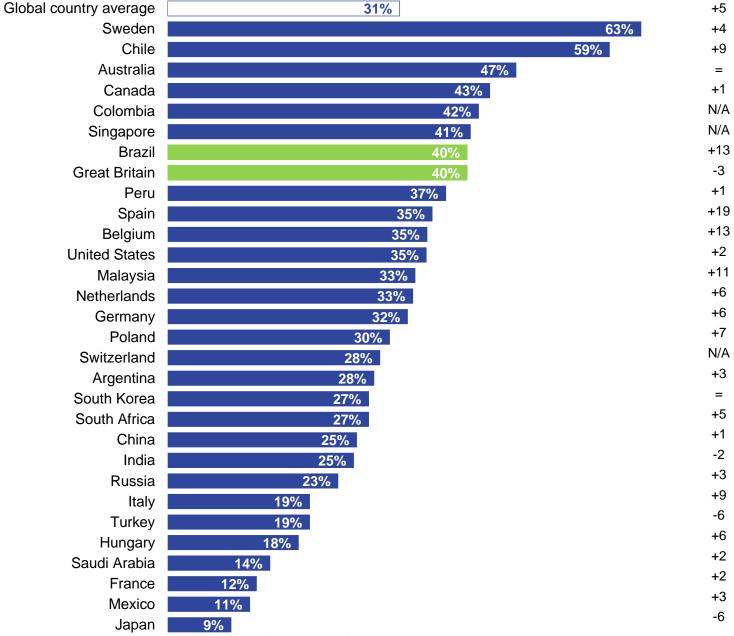
MENTAL HEALTH

Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

Three in 10 (31%) across 30 countries say mental health is one of the top health problems facing people their country today. This is up 5 percentage points from 2020.

It is considered the number one health problem in Chile and Sweden. Concern has increased most since last year in Spain (+19), Belgium (+13), and Brazil (also +13).

Women are also more likely to select mental health as a top health concern (36% vs. 26% of men).



Base: 21,513 online adults in 30 countries, August 20th - September 3rd 2021.

Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, Singapore, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population.

The "Global Country Average" reflects the average result for all the countries where the survey was conducted.





STRESS

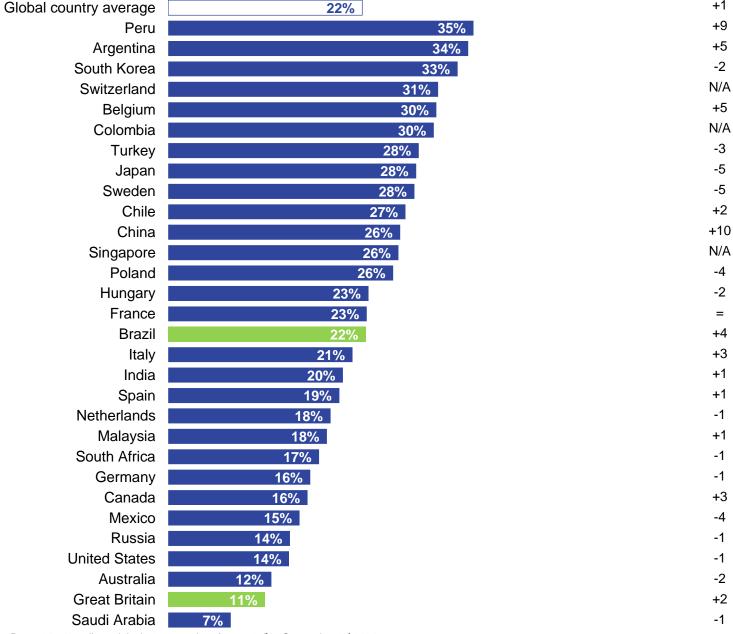
Thinking generally, which of the following, if any, do you see as the biggest health problems facing people in your country today?

One in five globally say that stress is a top health issue (22%).

One-third or more of respondents in Peru, Argentina and South Korea consider stress one of the biggest health problems facing their country today.

Japan and Sweden have fallen from the top three with 5-point decreases in each.

Overall, stress is considered a more serious health problem by under-50s around the world.



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MEATHER FULL REF

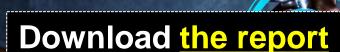
What will drive wellness in the future? PAGE 5

Can food replace medicine? PAGE 10

Can devices help us hack our way to wellness? PAGE 18

Four tensions shaping the state of wellness PAGE 24

Experts from CVS Health, Unilever, Lumen and more share insights on health equity, gut health and hacking your metabolism



Watch the webinar

Explore the microsite

540 CALORIES BURNED

GAME CHANGERS



SNAPSHOTS FROM THE US





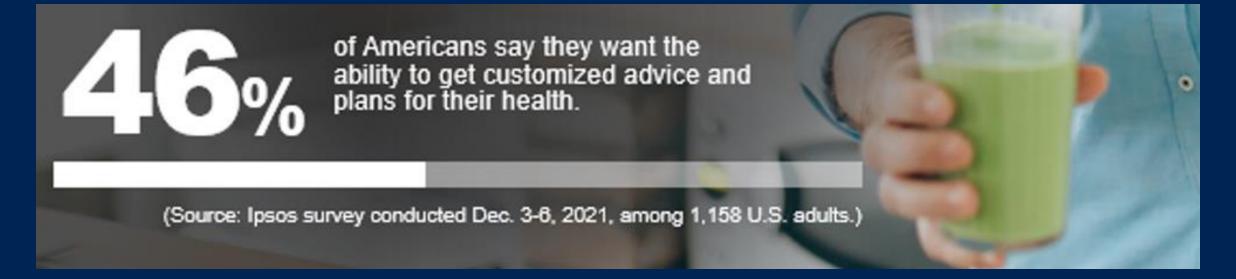
of Americans agree that their health is more important to them now than before the COVID-19 pandemic.

(Source: Ipsos survey conducted Dec. 3-6, 2021, among 1,158 U.S. adults.)



SNAPSHOTS FROM THE US

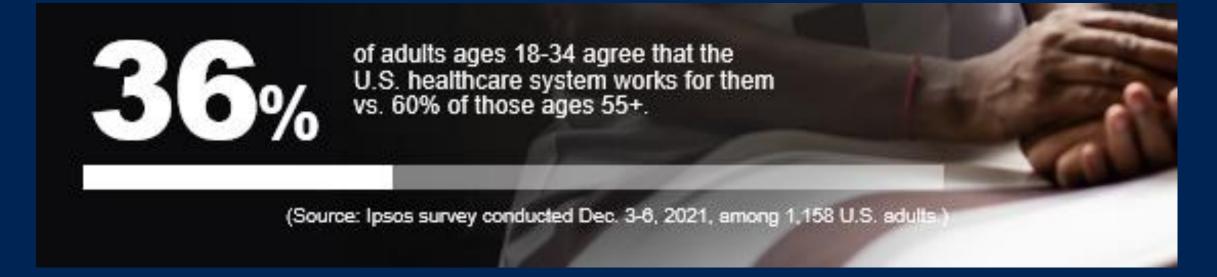






SNAPSHOTS FROM THE US







Territory: What will drive the future of wellness?

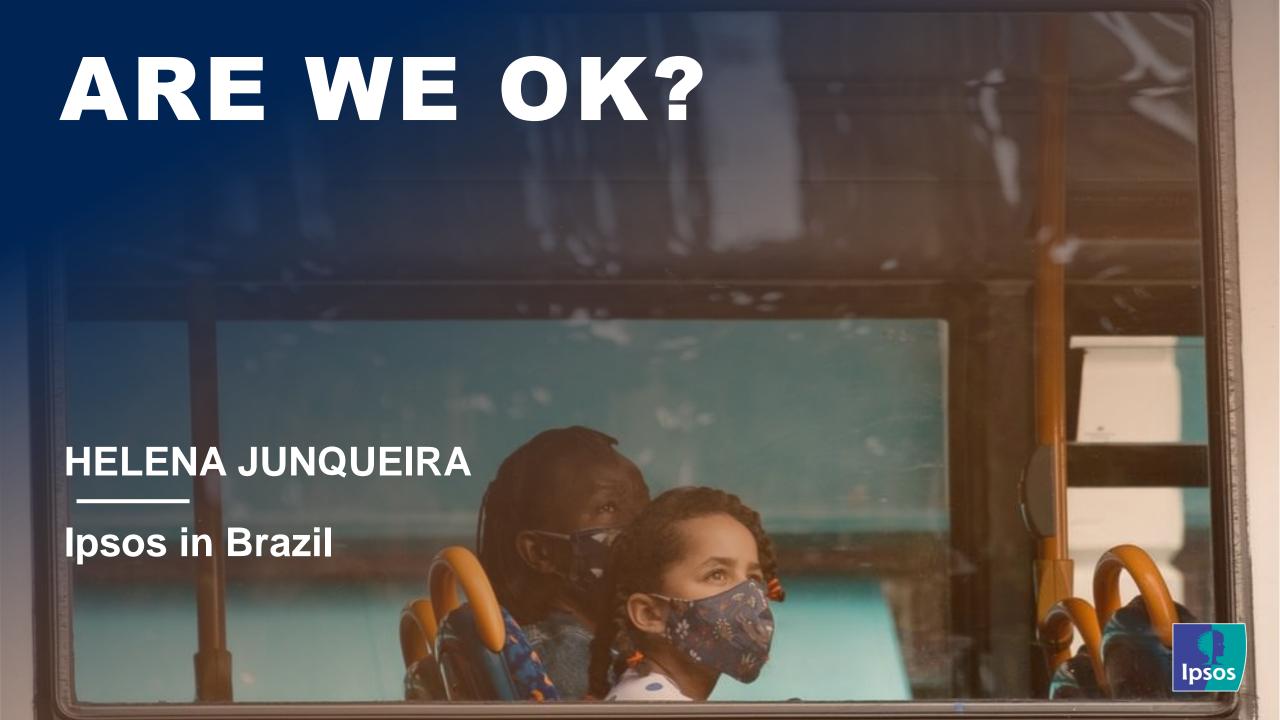
Wellness is a broad topic, encompassing everything from mental and spiritual wellbeing to financial wellbeing and, of course, physical wellbeing. The future will be impacted by macro trends such as an aging population, which will impact the growing caregiving crisis, to how we innovate products and services to meet their growing needs. And will we create more equitable access to care? Climate change and our built environment play a role as well.

Read on as we go around the map, collect the data and talk to experts in these fields.





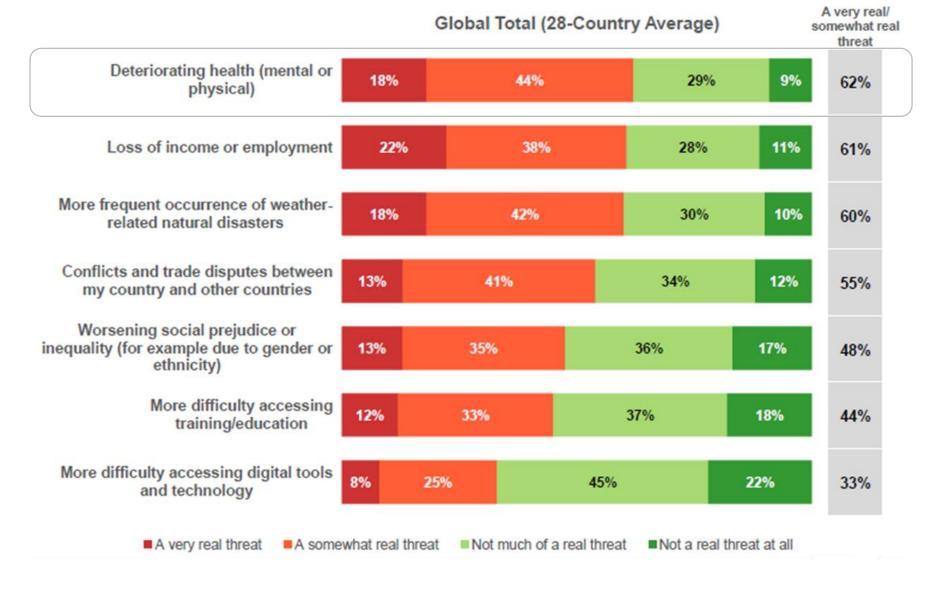








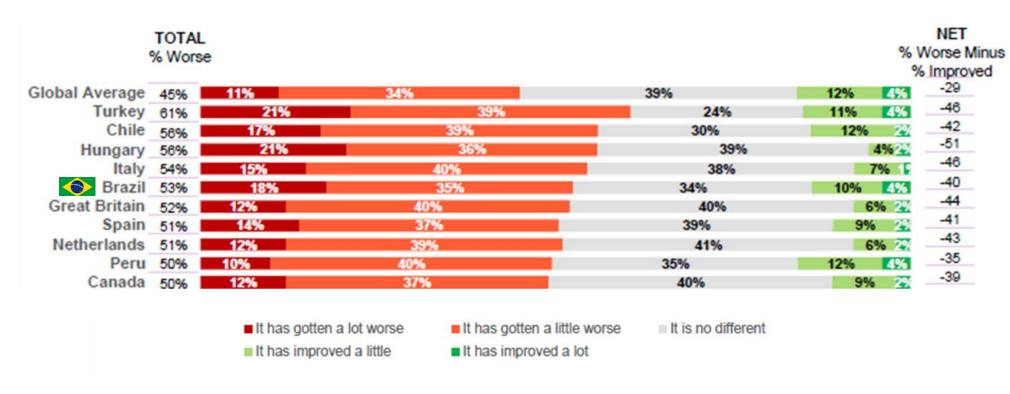
How real do you feel the threat is of you and your family having to face any of the following in the next 12 months?







How has your emotional and mental health changed since the beginning of the pandemic about a year ago?











How often do you feel lonely?

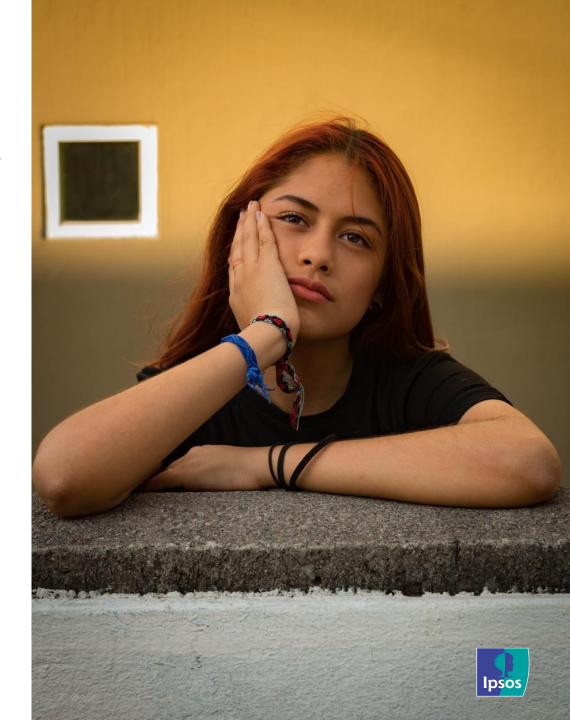
Country

Often/Always/Some of the time

Hardly ever/Never

Global Average
Brazil
Turkey
India
Saudi Arabia
Italy
South Africa
Malaysia
Chile
South Korea

/erage	33%	37%
Brazil	50%	28%
Turkey	46%	32%
India	43%	27%
Arabia	43%	37%
Italy	41%	29%
Africa	40%	28%
alaysia	39%	21%
Chile	38%	37%
Korea	38%	28%
Peru	37%	35%



Source: Ipsos survey "GLOBAL PERCEPTIONS OF THE IMPACT OF COVID-19"

BRAZIL

Feeling lonely or isolated when working from home

51% Difficulty finding a work-life balance

60% Increased anxiety around job security

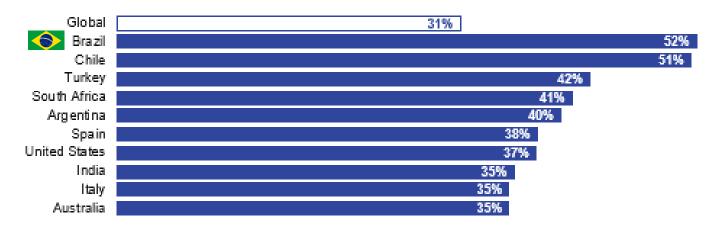
45% Stress due to family pressures (e.g. childcare)

Source: Ipsos survey for The World Economic Forum, "THE COVID-19 PANDEMIC'S IMPACT ON WORKERS' LIVES"

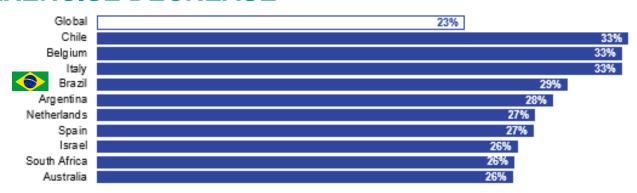


Since the COVID-19 pandemic began, which of the following, if any, have you personally done?

WEIGHT GAIN



EXERCISE DECREASE



Source: Ipsos survey "DIET & HEALTH UNDER COVID-19"











For more analysis on Brazil, explore the new Ipsos Flair report, "Gaps and Bridges", available here







On-line conversations on public posts from social networks, blogs and forums

Mega-query: key words in English related to Wellness and Health Management (Covid 19 Vaccines not included)

Exclusive analytics run on US and Indian corpus







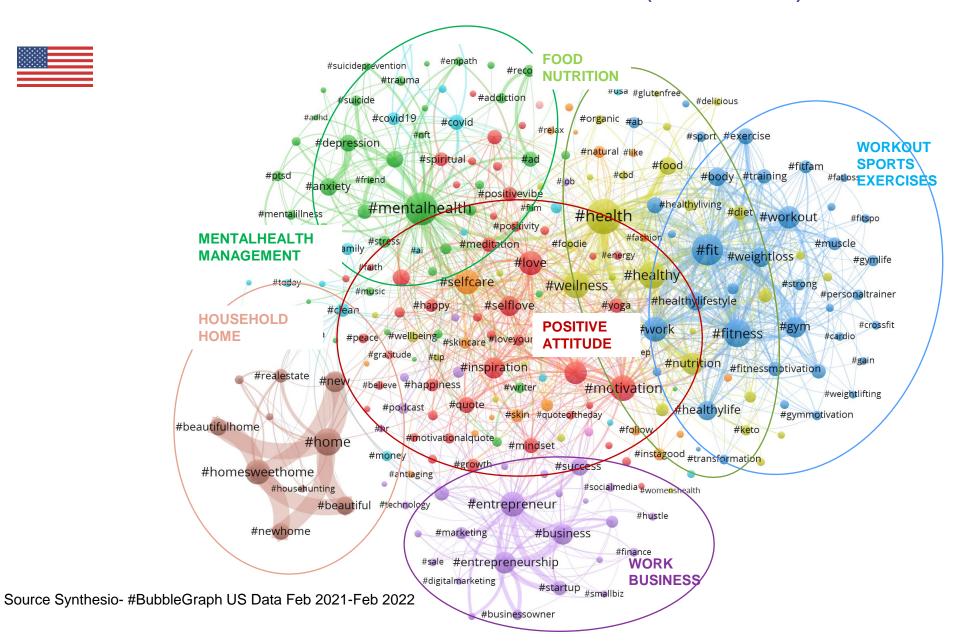


THE 2 FACES OF CONVERSATIONS, NOW ALMOST EQUALLY WEIGHTED



WELLNESS CONVERSATIONS TOUCH (ALMOST) ALL ASPECTS OF LIFE

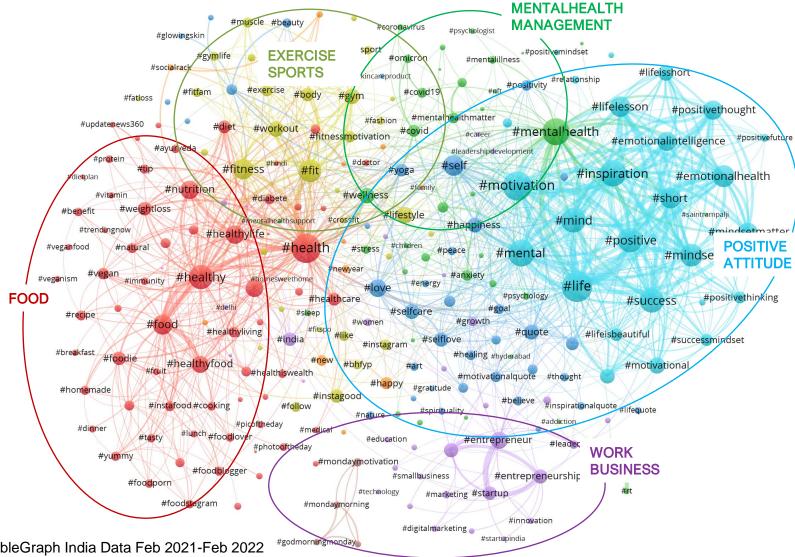






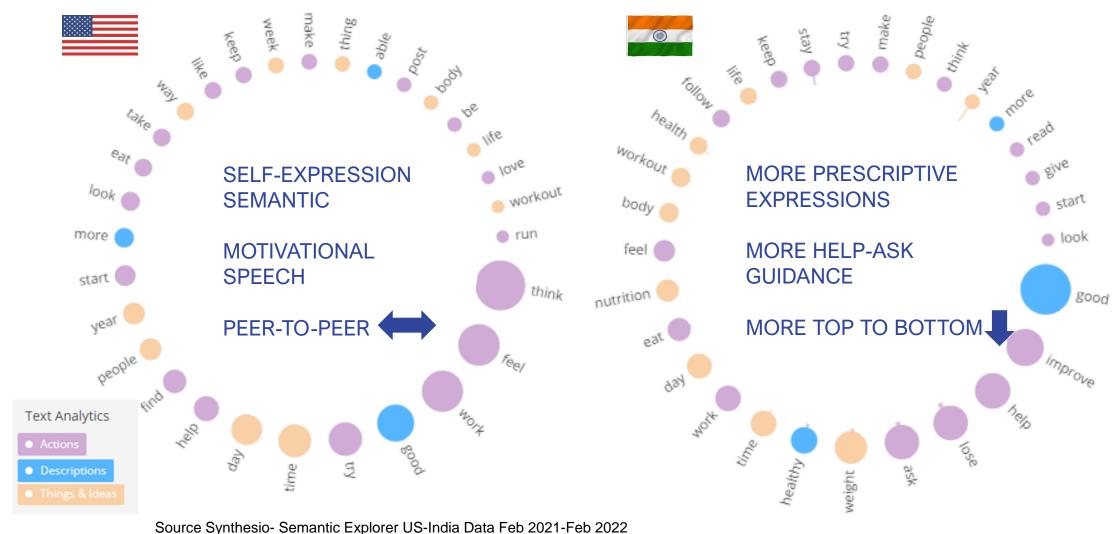
WELLNESS CONVERSATIONS ARE CULTURALLY GROUNDED







THE WORDS OF WELLNESS

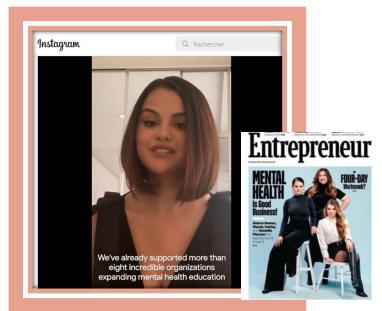




THE POSITIVE FACE OF CONVERSATIONS DESTIGMATISATION, SUPPORTS IDENTIFICATION AND GRATITUDE



#1 Mental Health Influencer



Post Jan 18th #DoodleWithGoogle 7 551 254 views Feb 22nd @selenagomez 298M followers

Destigmatisation reveals



#1 Bottom-Up Topic Modelling Topic = Self-Love and Gratitude (15%)



Source Synthesio- Topic Modelling Mental Health US data- Nov 2021/Feb 2022



THE UNHEALTHY SIDE OF MENTAL HEALTH CONVERSATIONS

FROM MENTAL HEALTH DESTIGMATISATION

FREEING SPEECH
REVEALING THE SITUATION

WITH DEDRAMATISATION...

PROMOTING SUPPORT-HELP GUIDANCE

TO RISKY NORMALISATION & MORBID FASCINATION?

... TO UNHEALTHY/TOXIC CONVERSATIONS AND WRONG SUPPORT (TROLLS, PREACHS...)

TAKE-AWAYS FOR BRANDS

CONSUMERS ARE IN THE SEARCH FOR (ALL TYPES OF) FEEL GOOD EXPERIENCE/ CONTENT

LOVE, SELF-LOVE & GRATITUDE
ARE TOP WELLNESS
CONVERSATIONS DIMENSIONS

ALL VERTICALS ARE IMPACTED
BY WELLNESS AND MENTAL
HEALTH:
FROM ENTERTAINMENT, FOOD
&BEVERAGES, HEALTHCARE,
TECH...

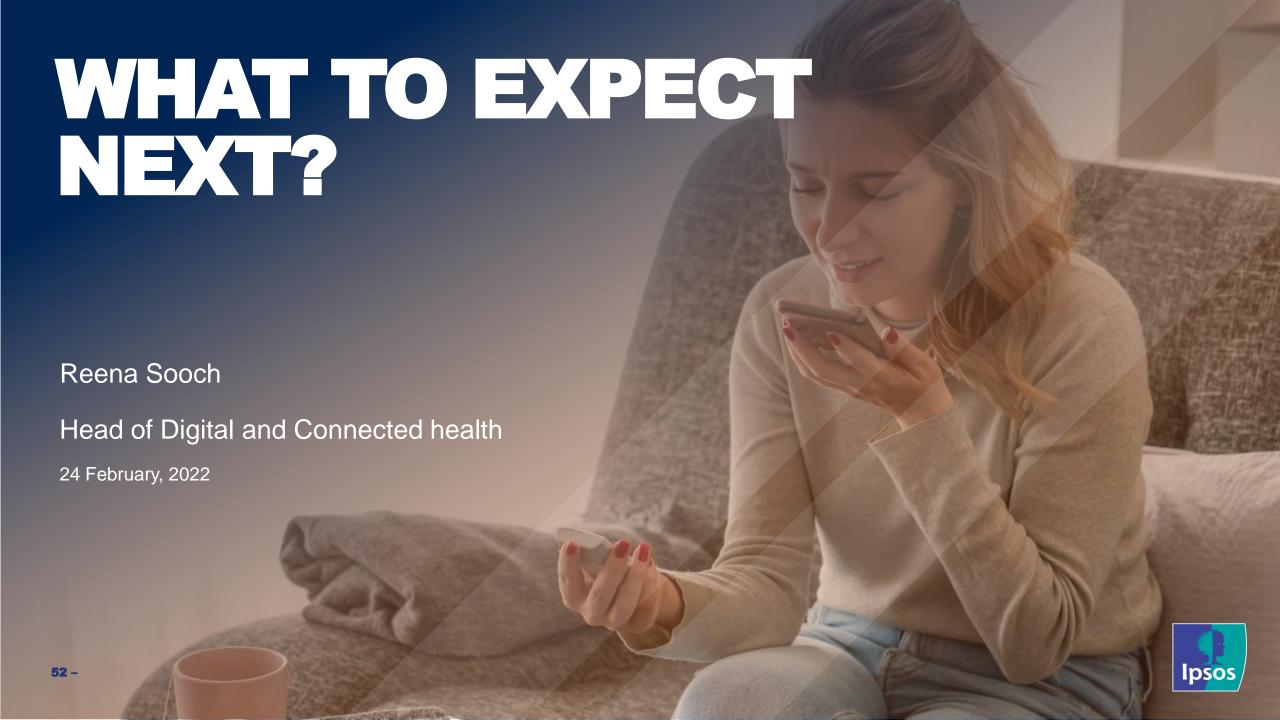
AS PRODUCTS & SERVICES
PROVIDERS
AND AS EMPLOYER BRANDS

HIGH ENGAGEMENT
WITH AUDIENCE
ON WELLNESS + FIELD OF
LEAD-USERS INNOVATION

... MENTAL HEALTH IS A RISING CONCERN,
DISCUSSED AS A THREAT FOR SOCIETY AND INDIVIDUALS







THE FUTURE OF THE \$1.5 TRILLION WELLNESS MARKET

Consumers intend to keep spending more on products that improve their health, fitness, nutrition, appearance, sleep, and mindfulness.



https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/feeling-good-the-future-of-the-1-5-trillion-wellness-market



WEIGHT LOSS, WELLNESS AND PERSONALIZED CARE LEAD THE WAY IN DIGITAL HEALTH INVESTMENT

~30bn in 2021 digital health funding

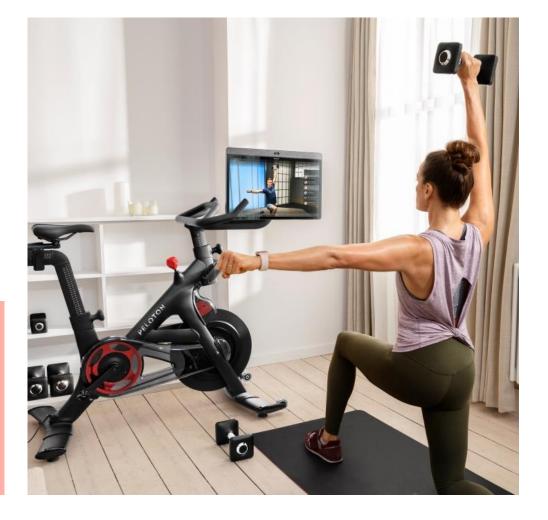




Including:











MENTAL HEALTH IS NOW THE TOP FUNDED CLINICAL INDICATION

2021 TOP FUNDED CLINICAL INDICATIONS



2017-2021; numbers equate to funding rank

	2017	2018	2019	2020	2021
MENTAL	\$0.5B	\$1.4B	\$1.0B	\$2.7B	\$5.1B
HEALTH	2	1	1	1	1
DIABETES	\$0.3B	\$0.4B	\$0.5B	\$0.8B	\$1.8B
	4	4	4	6	2
CARDIO-	\$0.5B	\$0.6B	\$0.6B	\$1.1B	\$1.8B
VASCULAR	1	3	3	4	3
PRIMARY	\$0.1B	\$1.0B	\$0.5B	\$1.7B	\$1.6B
CARE	15	2	5	2	4
MUSCULO-	\$0.5B	\$0.2B	\$0.2B	\$0.2B	\$1.4B
SKELETAL	3	12	14	12	5
ONCOLOGY	\$0.3B	\$0.4B	\$0.6B	\$1.3B	\$1.4B
	6	5	2	3	6

NO O

24/7 CARE

CHAT BOTS

VIRTUAL REALITY

EXPOSURE THERAPY

GROUP THERAPY

HCP AND COUNSELLOR CONSULTATIONS

MINDFULNESS

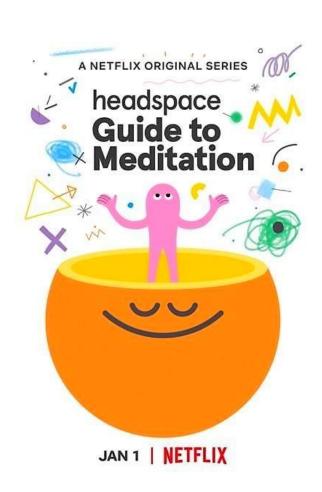
SENSORY EXPERIENCES

https://rockhealth.com/



WELLNESS INTEGRATED INTO EVERYDAY LIVES







Over 6.5 million young people have participated in Barclays LifeSkills





"We need everybody, all industry stakeholders to really understand why mental health is so important. It's not an island on itself. We need to show how [improving] mental health improves whole health."

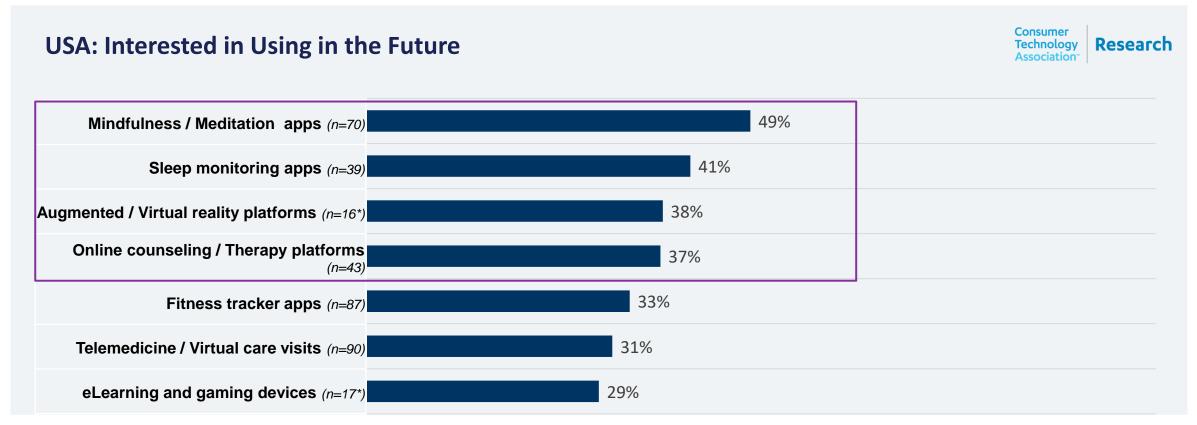
Alyssa,

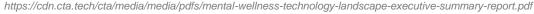
Happify



MINDFULNESS, SLEEP AND AR/VR LEAD THE WAY IN FUTURE CONSUMER INTEREST

Collaborative report between Ipsos and consumer technology association

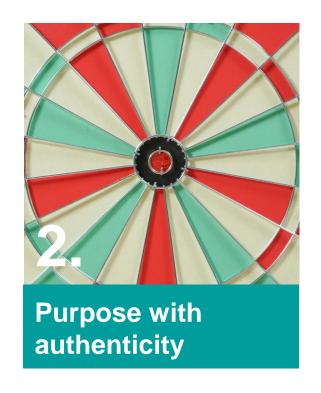


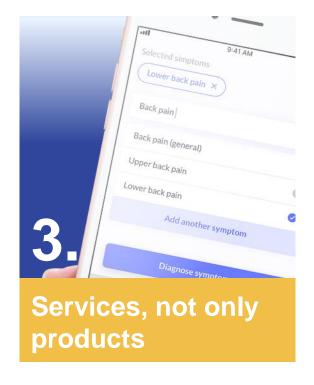




IMPLICATIONS ACROSS SECTORS









CHALLENGES TO OVERCOME



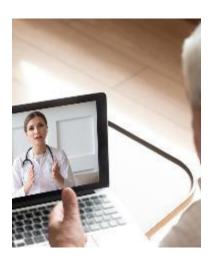
Tech-equity



Aging population



Data privacy



Access

