

MENTAL WELLNESS: THE CHANGING INDIAN ATTITUDE

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INTRODUCTION

Our life has become increasingly digitalised to the point where we are always connected and perpetually “on”. We are connected through multiple gadgets and cables, with Wi-Fi signals as constant companions. In India, the current number of internet users stands at 696 million and is projected to rise to 974 million by 2025¹. Many Indians are accessing the internet through their smartphone; a user base estimated to reach 829 million users by 2022².

Due to the COVID-19 pandemic, digital life has been amplified and our relationship with technology is being pushed to new extremes. As a result, people are recognising that the way they use the internet, and social media, is leaving them feeling stressed. This risk threatens us more while we are currently doing everything from home. Concerns about the impact of screen time have been pushed aside to fulfil daily tasks and roles – be it in work, education,

entertainment or self-enhancement – and there are more school-age children using the internet today than ever before.

It is no surprise then that more of us report feeling overwhelmed than ever before, indeed it was one of the key trends observed in Ipsos' 2020 Global Trends report³. Findings reveal that, globally, 63% of us wish our lives were simpler – and more than three in five wish we could slow down the pace of our lives. Over half of us globally (52%) feel overwhelmed by the multitude of choices we have about how to live our lives – a rise of 4% since 2013.

Focusing on India, this paper explores the different aspects of digitalisation and fast-paced nature of modern society engulfing people emotionally. We also touch upon the coping mechanisms and means to deal with this, highlighting examples of brands which are addressing this precise consumer need.

DIGITAL CONNECTIVITY IS A DOUBLE-EDGED SWORD

Digital connectivity has made it possible to reach anyone at any point in time through text messages, phone calls, e-mail, Facebook messages, Tweets and Instagram photos.

In the current context of the pandemic, digital connectivity has helped people across the world to lead a life seamlessly without stepping out of their home. People are remaining connected at work, with family and friends, and with the education system, and buying groceries and paying utility bills online. COVID-19 has demonstrated the fact that people can function in an almost contactless world.

Hence, we are connected on multiple levels but, at the same time, disconnected on a human level. Culturally, the focus in India is on sharing and caring for each other and living in a

community. Though the digital world can bring us together, we miss real life contact.

On social media, people look for appreciation and engagement through likes and comments. Depending on the audience and the content, algorithms used by analytics companies can even guide people to choose the ideal time and day to post to achieve maximum engagement. But many studies have linked social media use and depression or speculated that the edited, online lives of others can cause discontentment with the lived reality of our own. A recent Ipsos study found people in India, along with Saudi Arabia and South Korea, most likely to buy products or experiences that will ‘look good in photos online’, while also being disproportionately likely to feel that their lives have become meaningless.⁴

FACTORS IMPACTING MENTAL WELLBEING PRIOR TO COVID-19

In these hectic lives of ours, we are continually focused on meeting our goals and fulfilling our ambitions. People are trying to maximise life and get the best from it in the shortest time.

Interestingly, Ipsos' annual Global Happiness Survey shows a gradual decline in the happiness quotient year-on-year. Compared to 2011, the percentage of those saying they are happy in 2020 has fallen by 14 points globally. In India, we have seen a dip by more than 20 points compared to 2011 and an 11-point drop compared to 2019⁵ (see Figure 1).

We see a similar trend in the UN World Happiness Report 2021⁶, with India ranked 139 out of 149 countries – compared to 2012 where India was ranked 117 out of 158 countries in the list.

For Indians, there are many possible factors driving this decline in happiness, even though the economic parameters of the country do not really reflect a downward trend. The fast-paced nature of urban life inspires and provides an escape from the monotony, yet at the same time it comes with its own set of problems. The migration to cities from small towns and rural areas has resulted in a more stressful city environment with ever-increasing traffic congestion, and noise and air pollution, which can trigger health complications and anxiety. Other possible factors in the decline in happiness include lack of employment opportunities and increasing concerns around the safety and security of women.



Figure 1 Percentage of people who say they are 'very happy' or 'rather happy' (combined %)

	Dec-11	May-13	Mar-17	Feb-18	Jun-19	Aug-20	Change since December 2011	Change since June 2019
Global Average	77%	77%	61%	70%	64%	63%	-14%	-1%
China	78%	79%	84%	85%	82%	93%	15%	11%
Netherlands						87%		
Saudi Arabia	83%	74%	75%	76%	78%	80%	-3%	2%
Canada	85%	83%	81%	81%	86%	78%	-7%	-8%
France	84%	81%	68%	77%	80%	78%	-6%	-2%
Australia	86%	84%	72%	82%	86%	77%	-9%	-9%
Great Britain	79%	81%	71%	78%	82%	76%	-3%	-6%
Sweden	80%	87%	74%	81%	75%	74%	-6%	-1%
Germany	76%	77%	71%	68%	78%	73%	-3%	-5%
Belgium	80%	80%	71%	80%	73%	71%	-9%	-2%
United States	85%	83%	80%	82%	79%	70%	-15%	-9%
Poland	75%	72%	66%	71%	71%	68%	-7%	-3%
India	89%	87%	78%	83%	77%	66%	-23%	-11%
Brazil	77%	81%	56%	73%	61%	63%	-14%	2%
Italy	73%	68%	53%	60%	57%	62%	-11%	5%
Malaysia				69%	52%	62%		10%
Turkey	89%	83%	58%	60%	53%	59%	-30%	6%
Russia	61%	62%	56%	62%	47%	58%	-3%	11%
Japan	70%	69%	62%	60%	52%	55%	-15%	3%
South Korea	71%	62%	48%	57%	54%	54%	-17%	0%
South Africa	79%	83%	59%	72%	59%	52%	-27%	-7%
Mexico	78%	80%	43%	67%	59%	46%	-32%	-13%
Hungary	43%	52%	48%	48%	50%	45%	2%	-5%
Argentina	68%	67%	48%	56%	34%	43%	-25%	9%
Spain	63%	57%	43%	53%	46%	38%	-25%	-8%
Chile			41%	71%	50%	35%		-15%
Peru			36%	54%	58%	32%		-26%

Source: Ipsos Global Happiness Survey

THE IMPACT OF THE PANDEMIC ON MENTAL WELLBEING

Findings from the Ipsos Global Health Monitor 2020 show that mental health remains a key health concern for the public and is ranked 3rd overall after Coronavirus and cancer. While scores for many illnesses have dropped this year, mental health (at an overall level) is consistent with 2018.⁷ In 2020, 26% of people across 27 countries say mental health is one of the top health problems facing people their country today (see Figure 2).

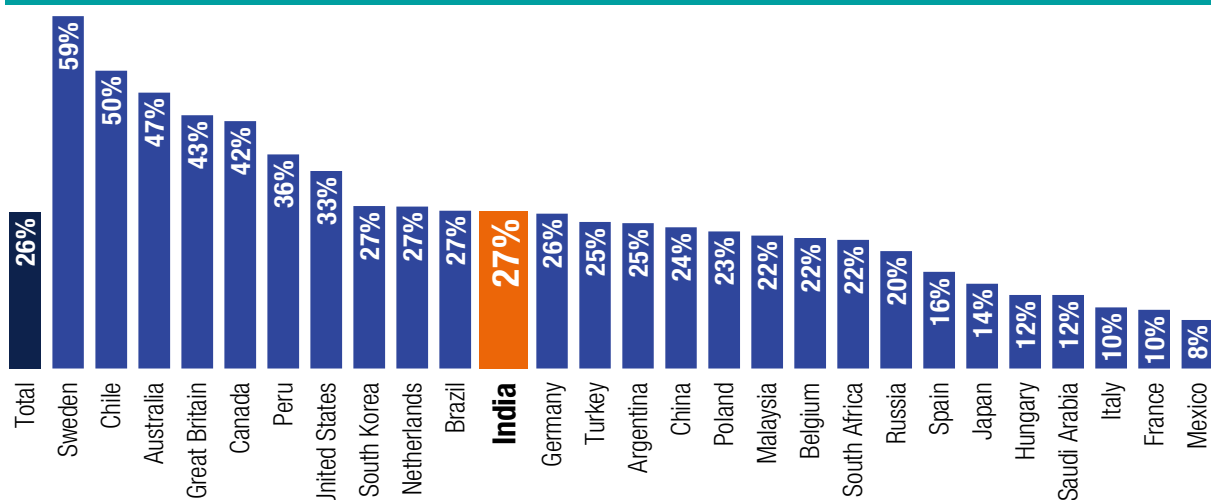
The feeling of being overwhelmed is not restricted to a particular life stage. The advancement of technology brings products designed to make our lives simpler but not everyone adapts with ease. The older generation can struggle to keep up with the younger generation. There is stress in every form be it in the workplace, relationships, education or social media. Our Global Health Monitor also reveals mental health appears to be a more prominent issue for younger people (31% of under-35s vs. 26% aged 35-49 and 21% aged 50-74). Women are also more likely to highlight mental health as a big issue (31% vs. 22% of men).

Meanwhile, another recent Ipsos study into personal concern and expectations on seven key issues⁸ found deteriorating health (mental or physical) is the top concern globally, followed by loss of income or employment.

In the current context, when mobility is restricted, there are different aspects making different groups of people feel overwhelmed. For example, children are caught in a vacuum of trying to adjust to online/distance learning and being isolated from their friends. For working adults, there are financial worries about jobs and income, with the lack of certainty about what lies ahead adding to their anxiety. Meanwhile, senior citizens with restricted mobility and increased social distancing measures, due to being in the vulnerable segment, will have experienced increased feelings of loneliness.

As per NIMHANS⁹, 1 in 5 adolescents suffer from some mental health issues in India. More generally, a pre-COVID report from the World Health Organisation (WHO) found that 7% of Indians suffer from mental health issues, a figure expected to rise to 20% in the next couple of years¹⁰. In addition, the WHO suggest that, by 2030, depression will be the single biggest cause of ill health¹¹.

Figure 2 Percentage of people who say mental health is one of the top health problems facing people in their country today



Source: Ipsos Global Health Monitor 2020

Base: 20,009 online adults aged 16-74, September 25th – October 9th 2020

BIGGER (OR MORE) IS NOT NECESSARILY BETTER ANYMORE

With a recent ASSOCHAM survey in India¹² showing that up to 50% of corporate employees feel stress, it is no surprise that taking a sabbatical in the initial years of corporate life – or taking a break to follow a passion or do something meaningful – is a growing trend that young people are adopting to manage the complexities of life.

We are also seeing a shift towards a desire for curated information. Use of apps like InShorts, a news app that presents the latest news from multiple sources in a short 60 words or less format, is gaining popularity among Indians. Mindfulness and meditation apps are also seeing a surge in demand and are aimed at helping increase focus and patience while reducing stress and anxiety.

However, it is paradoxical that those who seek a break from long screen hours are logging in daily on their gadgets to find focus and relaxation. But the world has changed, we are living in unusual times, and people are adopting virtual guided meditation techniques to find tranquillity. Our 2020 Global Happiness Survey revealed health and wellbeing was the number one factor for happiness, while time spent on social media ranks lowest – both globally and in India.

Indians have realised the value of the age-old practice of yoga and its benefits for both physical and mental alertness. This is further popularised by the Indian Prime Minister positioning yoga as a universal exercise through the campaign of 'hum fit toh India fit'. There is also the resurgence of analog games like Jenga, Scrabble and mah-jongg.¹³

The trend of slowing down emerged a little earlier in the developed world, and life in many Indian cities is now similar. The hectic pace and stress of city life, and the emergence of nuclear families in India, further adds to the daily stress. Indians are consciously taking steps to slow down and manage life efficiently.

Slowing down does not mean doing everything at a slow pace. Rather, it's about prioritising and knowing which situation requires people to rush. This is set to become even more prominent given the pace at which we lead our lives. We will see people embracing quality over quantity and enjoying a slower, simpler and happier life by de-cluttering both mentally as well as physically. This is again reflected in the World Mental Health Day study, where a majority of people in all countries, including India (64%), say mental and physical health is equally important.



HOW ARE MARKETERS IN CERTAIN SECTORS CAPITALISING ON THIS TREND OF SLOWING DOWN?

- Meditation apps like 'calm', 'headspace' and 'tide' promote mindfulness and can help people achieve calmer days and better sleep. While meditation is not a novel concept in India – our country is known to be an institution of spiritual living – these apps make it easy to learn and perfect the skill. Importantly, some of these apps have decontextualized meditation to fit in with modern, busy lives making it attainable for more people. Like the global growth of this sector, India is seeing more downloads and usage of meditation apps.
- Gyms are no longer focused solely on building muscle or losing fat – they also focus on holistic fitness routines which address both physical and mental needs. Mind.Fit, the yoga chain from Cult.Fit, markets itself on being a place to de-stress and find a connection between mind and body to reach overall wellness goals. In the absence of access to gyms for physical exercise, the 'mind fit' equivalent has gained huge popularity as it allows people to inculcate into their routine while being at home. This sector has seen a sharp spike during the pandemic where people across age-groups manage stress, emotions and anxiety through these online classes. Providers offer an array of options to choose from, including practice seated meditation, Zazen, chanting mantras, box breathing and visualisation. We have also seen the rise of numerous Wellness TV channels, with content created specially for the wellbeing of viewers.
- Wellness tourism is on the rise, with holiday and travel providers competing to provide the perfect untainted getaway spot and no-agenda holidays. During the pandemic, resorts have positioned themselves on 'wellbeing' through various activities.
- Spas and detox centres are mushrooming across town classes in India, promoting ways to relax and improve mental wellbeing. We are also seeing the emergence of luxury high-end spas like Ananda Resorts promoting the combination of ancient Ayurveda and yoga with modern therapies in the natural Himalayan locales. With the restrictions currently imposed due to pandemic, consumers are waiting for these to open.
- Wearables that monitor daily steps and remind people to take a walking break are more popular than ever.
- Simplified food devices such as Vitamix and Instant pot are a growing cooking trend, helping people to avoid chaos in the kitchen.
- Cafes and restaurants are encouraging conversations between customers through a no-phone policy, whereby they offer a discount on the bill if everyone on a table surrenders their phone for the duration of their visit.
- Ayurveda formulation capsules that help calm people down, like Dabur Stresscom, have a growing influence in preventative healthcare in India.
- Awareness of mental wellbeing is higher than ever. Brands are consciously talking about mental wellbeing either through providing platforms that offer curated content designed to manage moods, such as MyHappiness, or campaigns that focus on mental wellbeing, such as Future Generali's 'health inside out' campaign.

IN SUMMARY

As a wise man once said, *'Stress does not come from what is going on in life, but from your thoughts about what is going on in your life'*, so how we manage and work around it is the only way.

Although wellness has long been an integral part of Indian culture, Indian consumers are more conscious than ever of the importance of mental health in their overall wellbeing. They not only want to look good but feel good too, and the pandemic has further heightened the need for better mental health to cope with the stress.

The wellness sector has transitioned into the cusp of transformation and there is a lot that will fuel growth in this sector in India. We are witnessing a shift in people's lifestyles, whereby they are more conscious of safeguarding their wellbeing with an increased preference for work-life balance. Given that remote working is here to stay, consumers are allocating time for self-care.

Alongside a healthy diet, nutrient supplementation and activities for mindfulness, brands need to think innovatively to address consumer needs. The wellness space can cut across various product and service categories and there is ample potential that can be tapped into. We are already seeing new product launches in capsule formats to combat stress and enhance mental wellbeing, along with Meditech products like breathing sensors that measure the cognitive and emotional state and help to empower people to take care of their wellbeing.

Given the pandemic, consumers are anxious about overall health and financial/job security and are not as concerned about daily chores as they were pre-COVID. With the right message and product, there is an opportunity for any brand to build deeper connections with their consumers and support them to improve their lives.



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