

# Trajectory 3: From Health to Wellbeing



This latest Trajectory from the Trajectory Partnership looks at changing attitudes to health – especially the shift in focus from physical health to mental wellbeing and life satisfaction. Consumers have an innate desire to look young and feel healthy, but a health paradox has emerged in many advanced economies: consumers enjoying the highest standards of physical welfare in history are anxious about their supposedly poor health.

## INTRODUCTION

On one hand, we have never been healthier. Life expectancy has increased dramatically in the last 50 years; by 16 years worldwide, by 20 years in developing or emerging countries, and even by 7 years in the richest nations. In 1960, a woman in France could expect to reach 69 years of age – now, they are likely to live well beyond 80. As we get older, life expectancy rises even more – the same woman in France could, at the age of 60, expect to live another 27 years, while a woman in India could expect to live another 18 at the same age (adding 10 years onto the life expectancy at birth).<sup>1</sup> Progress in the quality of healthcare – as well as access to it (and prevention through healthier lifestyles) is behind this change.

This excellent news is easily forgotten and largely overlooked. More than two-thirds of people worldwide agree that ‘the world is a more dangerous place than it used

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<sup>1</sup> All data on life expectancy from the UN World Population Projections, 2010.

to be', and the proportion of people who believe that individuals should be urged to eat more healthily through government campaigns (67%) dwarfs the proportion who believe that fundamentally, people should be free to eat and drink whatever they want (33%) – damaging consumption is a prevalent concern around the world.<sup>2</sup>

These concerns seem a little at odds with the trend data on our physical health.

## **WHY WELLBEING?**

The focus on damaging consumption as the biggest threat to a healthy life is propelled by the comparative lack of other factors. Obviously, real threats still exist (heart disease and cancer – the two biggest causes of death in advanced economies – are often linked to lifestyle factors), but over the last century, reductions in poverty, access to universal healthcare and greater awareness about what is bad for us has made physical threats to our wellbeing less potent. In their place have risen concerns about less tangible aspects of our health, such as mental health, stress, fitness, happiness, optimism or satisfaction – in short, wellbeing.

The focus on wellbeing is linked to concern about damaging consumption but is not limited to it. Drinking less, smoking less and eating more healthily are not only associated with long term health but also with short-term fitness and vitality. As consumers have cut back on these behaviours<sup>3</sup> they have also begun to reassess other aspects of their lifestyle that they view negatively – how much time pressure they feel under, the degree of freedom of choice and control they feel, or their work-life balance. Accompanied by a welcome increase in medical diagnosis and the social acceptability of mental ill health, these factors have combined to create a serious and sustained focus on individual 'wellbeing'.

Measurements of subjective wellbeing generally rely on self-evaluation of happiness and satisfaction – the respondent is asked to consider how happy they feel at the moment, and separately, how satisfied they are with various aspects of their life (family, friends, job etc.) as well as their life overall. Such measures are by no means definitive, but do provide an insight into the subjective wellbeing of the respondent.

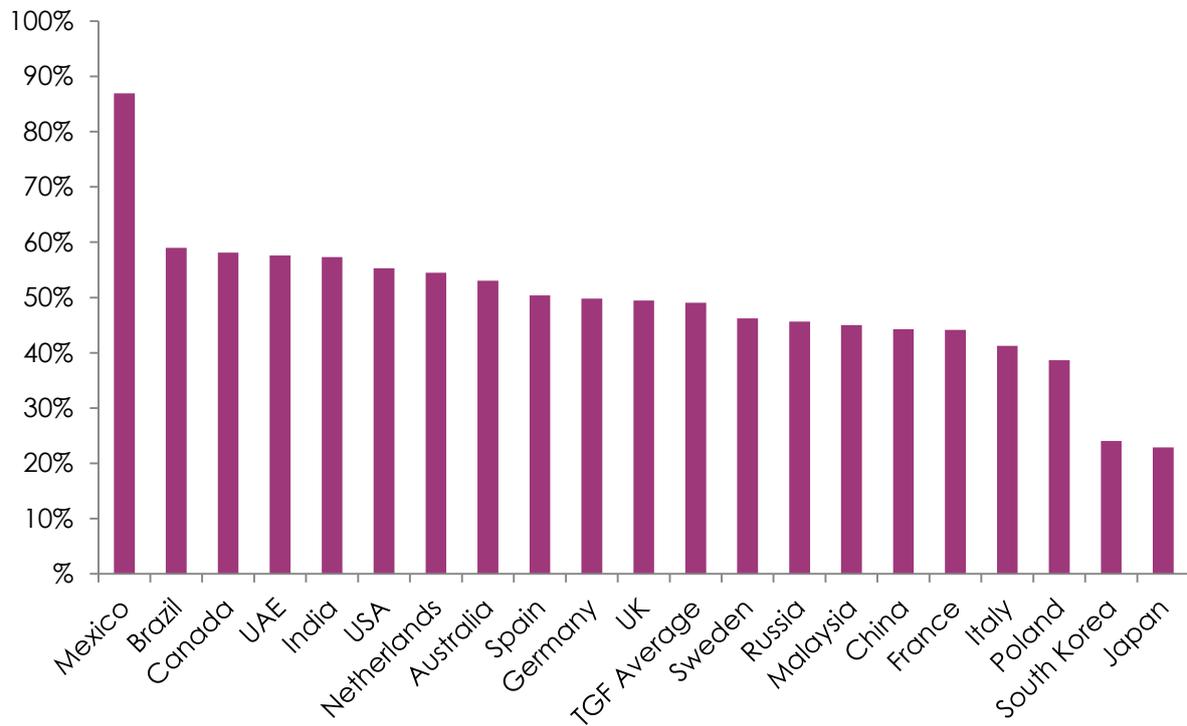
The importance of wellbeing is increasingly being recognised by governments. First used in Bhutan in 1972, 'gross national happiness' has emerged as a viable alternative to traditional measures of national performance across the world; in 2011, both Canada and the UK launched wellbeing tracking studies.

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<sup>2</sup> Trajectory Global Foresight 2011-12

<sup>3</sup> for example, in the UK, rates of obesity have declined from 62% in 2006 to 57% in 2010; the proportion who have never smoked has increased from 46% in 1993 to 55% in 2010; the proportion of young people who regularly exceed the recommend daily amount of alcohol has dropped from 48% in 2002 to 38% in 2010. All figures from the Health Survey for England (HSE), released December 2011

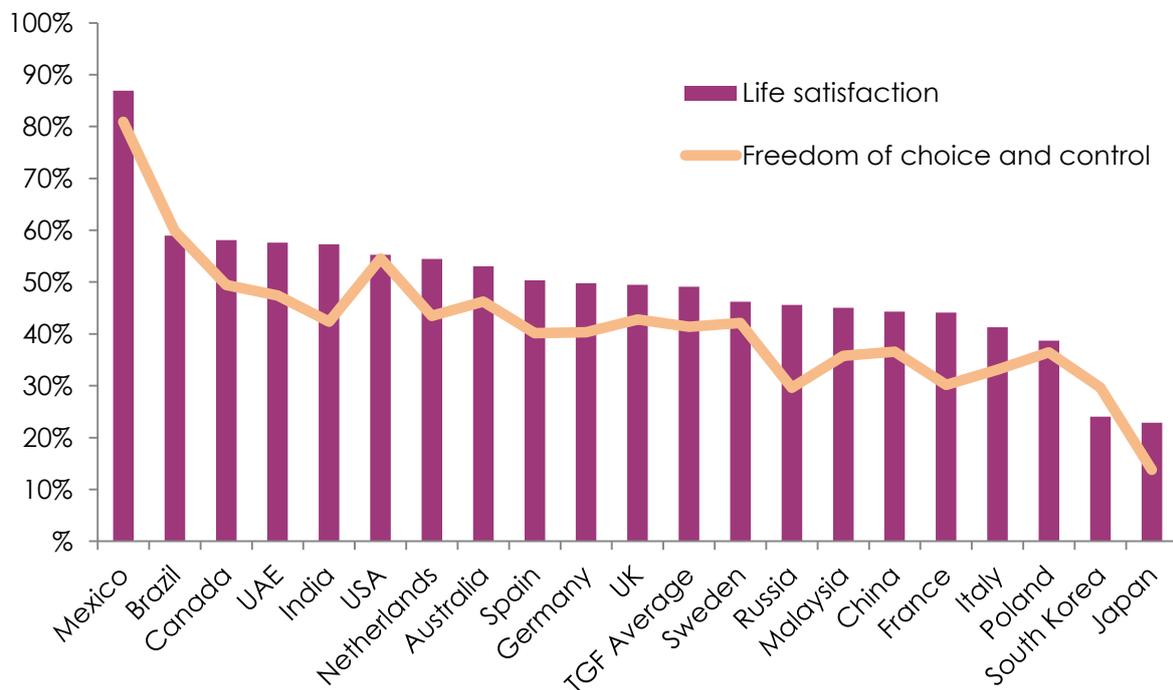
## % reporting a high level of life satisfaction – international comparison



Source: Trajectory Global Foresight 2011/12 (Base, 55,000) (all those who rated their overall life satisfaction at 8/10 or higher)

National wellbeing does not correspond to a nation's wealth although many would argue at least for an enabling relationship between individual well-being and individual wealth. In fact, as the chart shows, according to Trajectory Global Foresight data, consumers in emerging nations – namely Brazil, Mexico and India – are among the most likely to feel high levels of life satisfaction. Contrastingly, advanced nations dominate the other end of the scale – consumers from France, South Korea, Japan and Italy are among the least likely to have high levels of life satisfaction. This is partly because satisfaction does not strongly correspond to national wealth – or at least, it doesn't correspond as strongly as it does to one's sense of freedom and control.

## Freedom and control & high level of life satisfaction



Source: Trajectory Global Foresight 2011/12 (Base, 55,000) (all those who rated their overall life satisfaction or level of freedom of choice and control at 8/10 or higher)

Consumers in advanced markets suffer a perceived lack of freedom of choice and control. Surely this is at odds with the reality and is in fact deeply ironic given the founding principles of our consumer society. Advanced economy consumers (generally) enjoy shorter working hours, historically and relatively high incomes, better health, longer lives, regular holidays, heightened consumer choice and a plural democratic political system. The cause of this perceived lack of freedom of choice and control is the same factor that causes an increase in perceptions of time pressure – a high level of complexity in consumer's lives.

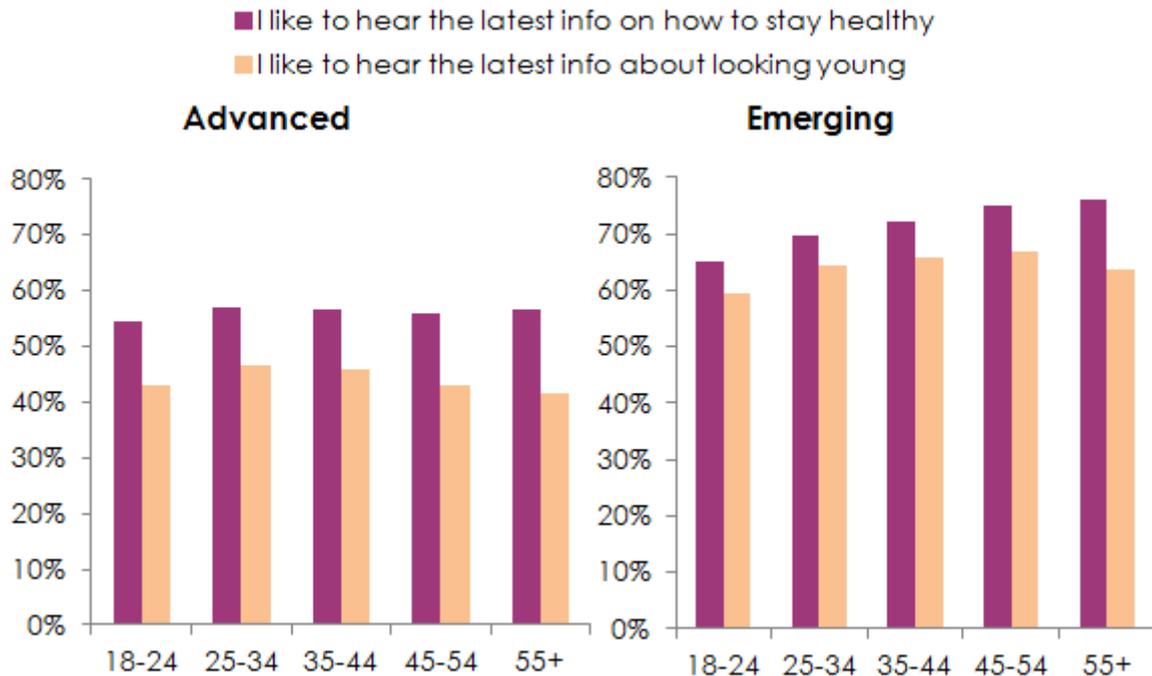
Consumers might only have themselves to blame of course. The have-it-all, do-it-all attitude pivotal to contemporary consumer society demands a home, a car, a family, a career, travel, holidays, a thriving social life and even excellent health, worthy aspirations that have for many evolved into an entitlement. It is this last point that creates reduced perceptions of freedom, increased perception of time pressure and greater anxiety.

### THE IMPORTANCE OF WELLBEING

The shift in focus to wellbeing is not purely driven by a rise in perceived entitlement. The coincidence of this new government enthusiasm for well-being measures with the decline in traditional measures of progress (e.g. GDP) has led some to be highly

cynical about the motivation. Nevertheless, as developmental milestones are surpassed in advanced economies – such as literacy or disease eradication – other measures *are* needed to gauge societal development. Health and well-being is an intelligent focus as it is of paramount importance to many consumers.

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Source: Trajectory Global Foresight 2011/12 (Base, 55,000)

Across age groups and income brackets, health is a crucial issue for consumers – especially consumers in emerging nations. Given the underlying importance of health as an issue, the shift to awareness and measurement of various aspects of it is not only inevitable, but welcome. In fact the market for 'self-monitoring' of health and well-being indicators is a significant success story in the context of mobile technology applications and is likely to expand greatly in the coming years as smartphone penetration increases globally. What may become particularly interesting is the emerging relationship between private preventative and self-monitoring measures with the public provision of health care services.

With the 'perfect storm' of consumer empowerment, technological innovation, demographic change and economic recession upon us the pressures on public providers of health care are such that access to certain services is likely to become increasingly conditional upon our 'self-help' measures - and we are likely to see an increase in anxiety and a deterioration in well-being for those affected as a result.

While at first glance the government focus on subjective well-being may seem like an escape from hard economic realities it is clear that low overall life satisfaction is

strongly influenced by low satisfaction with one's job, one's leisure time and household finances – all themselves factors in recognised (and common) mental health illnesses: stress, anxiety and depression. Housing, employment and environment are crucial drivers of well-being and so the argument returns to the economic and social context rather than the individual.

There are of course clear opportunities for brands to engage with consumers across this territory. Linking self-monitoring with social gamification is reasonably well-established through brands such as Nike and new networks such as FitBit. We even see that the language of personal fitness and self-improvement permeates the flip-flop market with the FitFlop product range. More examples are available through the TGF *Trends in Action* sections.

Equally brands that are able to assist consumers with time and financial management, personal organisation and portfolio management will generate high levels of engagement with key consumer segments. Mobile applications offer both a fertile and crowded route to market in this area, ranging from automated price seeking services to grocery shopping services, augmented reality applications for retail, current account management, and social media management.

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This Trajectory is driven by data and thinking from Trajectory's Global Foresight service (TGF) which covers 20 countries. The service provides analysis on the trends driving consumer and citizen behaviour - what they are, why they are important and where they are heading. All of the content is supported by research amongst over 40,000 people per annum.

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