Health & Wellness behaviors energized by the pandemic

and well-being is becoming increasingly holistic, reflecting the World Health Organization's founding definition of health as "a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity". The COVID-19 pandemic will cast a long

Society's understanding of health

shadow over consumers' lives and healthcare systems. Consumers will turn to tracking and insight.

home-lab tools for motivation and diagnostic **Main concerns**



Suffer from mental problems (stress,







26-40

Suffer from a chronic diabetes, asthma)

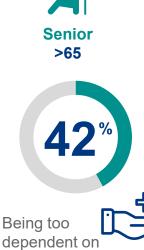
illness (eg. Obesity, Medical shift: changing nature of illness & disease





Being exposed to COVID-19 or another virus

/ being a contact case



a third party to keep them healthy Behavioral shift: changing nature of relationship to Health &

Wellness, more proactive & preventative approach

The quest for holistic well-being

TRENDS #1

The definition of health sector evolved, integrated the digital transformation has come to include mental health, healthy habitats, nutrition, fitness, and our overall well-being.

Student

18-25

take their mental

wellness

seriously,

and take steps

to ensure good

mental well-

being.



→ Digital healthcare is now a reality: COVID-19 has caused a massive acceleration in the use of telemedicine / digital front door to healthcare. **Digital healthcare** Since the pandemic



highest satisfaction, interest & 26-40

teleconsultation

are actively

space that

well-being

adapting their

home to create a

contributes to their

physical & mental







penetration among all the generations

services in the

future

9% of all the generations think have used the of using these have made a delivery of

26-40



18-25









The consumer patient Public health systems are under increasing pressure and scrutiny by consumers. Private actors are transforming the sector.

think of

using it in

the future

medicines

at home service



We are witnessing the transformation of the "patient" (who waits passively to be treated) into a "consumer" (who takes

active choices in determining his or her own care).

>55

don't think they will use it in the future TRENDS #2

more often used

both sectors

Public vs Private sector's usage **Europe (AU, SL, RO, PT, GR):** Asia (SG, JP, TH):

→ General practitioners,

specialists, surgery,

dental, emergency,

psychotherapies &

comfort and wellness

hospitalization,

surgery,

care

care

→ Reasons:

private sector

personalized care

Hyper-personalized

metrics has changed the health & wellness landscape since the pandemic. Health and exercise tracking tools and wearables are

to professionalize their fitness pursuits.

becoming more accessible, enabling consumers

hospitalization & surgery

→ General practitioners.

psychotherapies &

comfort and wellness

surgery, dental,

emergency,

→ Specialists,

Family

26-40

TRENDS #3



quality

public sector

more willing to use

both sectors

→ Assessed the **public sector** more favorably



→ Reasons: GenZ Benefit Student 18-24 security Consumers demand care that is not only accessible, reliable and affordable, but ADAPTED TO THEIR PERSONAL NEEDS, and is often delivered via private actors.



data-driven control The usage of wearables and smart technologies enabling the monitoring of a range of health

Genz Student 18-25 have been using it

expecting more features in their connected devices to be available in the future In the future they would rather use wearables to monitor:

Genz Student

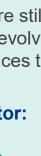
18-25

before the pandemic

Family 26-40 have used it since the

pandemic





26-40

Not yet but think of using it in the future → Physical activities & heart rate monitoring are still the main features used today across generations but their needs have evolved and consumers are

Family

41-55

Health indicator tracking apps



Health Al





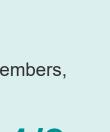
their blood 41-55 pressure Complete dashboards on health patient or family members, driven by artificial intelligence

have used

this service since

the pandemic





>1/3 of all the generations think of using it in the future

robotics & AI) set to revolutionize the way care is managed and delivered. database of consumer insights. The above data comes from a wave from 2021 surveying 21K consumers across Mexico, Thailand, Singapore, Japan, Switzerland, Austria, Portugal, Slovakia, Romania, Greece & Turkey and including questions

with innovative solutions (such as connected cognitive devices, electroceuticals,

related to COVID emerging new behaviours. Trends come from Foresight Factory



Allianz (II)