

**McCANN**  
WORLDGROUP

**the truth about**  
**WELLNESS**

Truths & Actions for a More Well Future

November 2021



the truth about

# WELLNESS

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WORLDGROUP

## Truths & Actions for a More Well Future

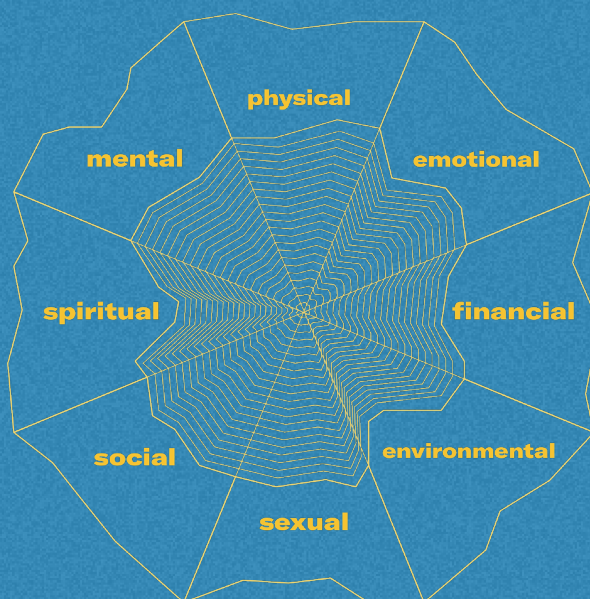
The Truth About Wellness 2021 study builds on 10 years of trended global data and research into the shape, role, and meaning of wellness in people's lives. A review of a decade in wellness culture is equal parts exciting and worrying.

In 2012, we spoke to experts from across industries—many of them pioneers in the broader wellness space. Unity Stokes predicted that wellness would be designed into every aspect of our lives. Dr. Andrew Weil talked about the need to make wellness sexy and fashionable. Wellness didn't just become fashionable over the last decade, it also became ubiquitous even before the global pandemic which has made it an imperative.

Today, **54% of people globally say that they've felt more unwell since the start of the pandemic, and 86% of people say that creating a well and healthy world is the biggest challenge of the 21st century.** Given that so much has changed in the past decade, it's worth revisiting the fundamental question that shaped that early research:

### What does being "well" mean in today's world?

What has changed is that this definition needs to expand. We're now tracking 8 dimensions of wellness including sexual and environmental wellness to the original 6 dimensions we identified a decade ago.



A decade ago, mainstream wellness conversations treated each of these dimensions largely in isolation. Today, the wellness conversation is more expansive, interconnected, and networked. This interdependent ecosystem is understood differently around the world. In China, mental and environmental health are interwoven whereas in Mexico people describe a deep connection between social and emotional wellness.

In a world that requires expansive, systems-wide wellness, brands and business should be asking:

**How robust is our thinking about the systems that will allow our organization and our people to thrive across all dimensions of wellness?**



**86%**

say creating a well and healthy world is the biggest challenge of the 21<sup>st</sup> century.



## Chapter 1

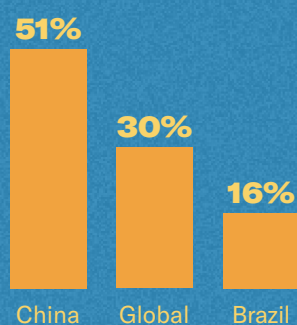
# From Well-Washing to Wellness as a Human Right

While there have been major long-term gains since the UN General Assembly established a Universal Declaration of Human Rights in 1948, it's also true to say that wellness today is out of reach for significant portions of the global population. **Only 50% of people say that we're healthier today than we were 50 years ago, and this rate drops to 40% in Mexico.**

From Barbies to GOOP's jade eggs to \$300 Bluetooth facemasks, there is an increased risk for brands to be seen engaged in "well-washing." These products, when not integrated into a broader approach to wellness, face similar challenges to initiatives that attempt to give off an impression of environmental friendliness or one-off actions towards LGBTQ+ inclusivity.

The COVID pandemic has been a stark reminder that health & wellness is far from being an equitable resource, with social disparities in access to healthcare being called out around the world. It's staggering that **only 30% of people globally think they have access to trustworthy healthcare.**

### I Have Access to Trustworthy Healthcare (Net Agree)



*"People who have more financial resources think about the future of wellness, such as clothes with technology, mental and emotional health, etc. But many Brazilians still struggle to eat enough a day—there is a huge gap in our country."*  
—Fernanda, São Paulo

It is unsurprising that **87% of people globally agree that every brand and business in the world needs to think more about people's health and wellness.** Yet only **26% of people believe that brands care about people's health and wellness.** It is vital that brands do not contribute to the well-washing problem and work toward bridging the wellness gap.



### Provocation

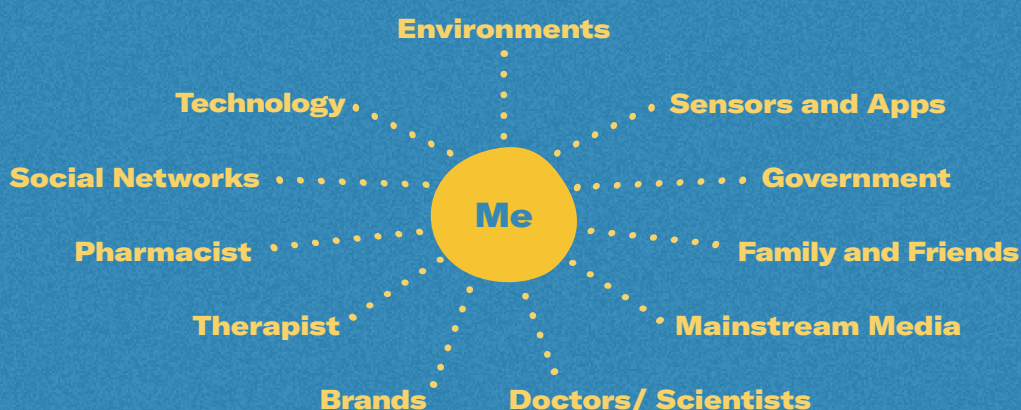
This **wellness gap** is an invitation for brands to take their commitment to the next level by enabling wellness authentically, meaningfully, and equitably. How do we move from a culture where well-washing proliferates to one where health & wellness is truly established as a universal human right?



## Chapter 2

# From the Chaos of Influence to Harmonized Expertise

In 2012, we charted the evolution of the wellness ecosystem. We discovered that the doctor had gone from being the central cog in the wellness system to one of many sources of influence. It was the patient who was at the center. Today, we're thinking less about "patients" and more about "people," who have developed highly personalized set of influencers and influences. In fact, **90% of people believe they are most responsible for their own wellness.**



But there is a dark side to this evolution. Many people feel overwhelmed by a chaos of wellness influencers and competing viewpoints. Two-thirds of people believe that there are too many voices "telling them how to be well." **84% of people across the world say they have seen misinformation on social media in the past year.**

Instead of testing hypotheses before reaching conclusions, more and more people are going straight from ad hoc observations to broadcasting conclusions. In a world where "the truth" is increasingly understood as "my truth," the need for evidence and fact-based wellness is paramount.



**84%**

say they have seen misinformation on social media in the past year.

### What will the lasting legacy of 2020 be in your country?

*"Ultimately, there'll be a huge impact on who we trust."* —South Africa

Reassuringly, people around the world today generally agree that "the importance of doctors and scientists" is one of the biggest gains of the pandemic, even outweighing "closer connections to family and friends." What the well world needs is a helpful mix of personal wellness autonomy and wellness authority, moving from the "democratization of influence" to "elevating the right expertise."



### Provocation

How can brands bridge the gap between personal autonomy and wellness authorities? How can we help people navigate the chaos of modern wellness by inspiring new experts and striking the right balance between authority and autonomy?



## Chapter 3

# From Self-ish Care to Communal Caregiving

Few wellness terms have gained momentum quite as rapidly in recent years as the concept of “self-care.” Self-care has become so prevalent that **3 in 4 people globally say that they need to focus on themselves before others**. Yet, the pandemic has also drawn into focus the limits of self-care, with self-care looking a lot more like isolation or even selfishness. **77% of people globally believe that emotional connections today are weaker today than they were in the past, and a shocking 46% of people say they feel like they have zero true friends.**

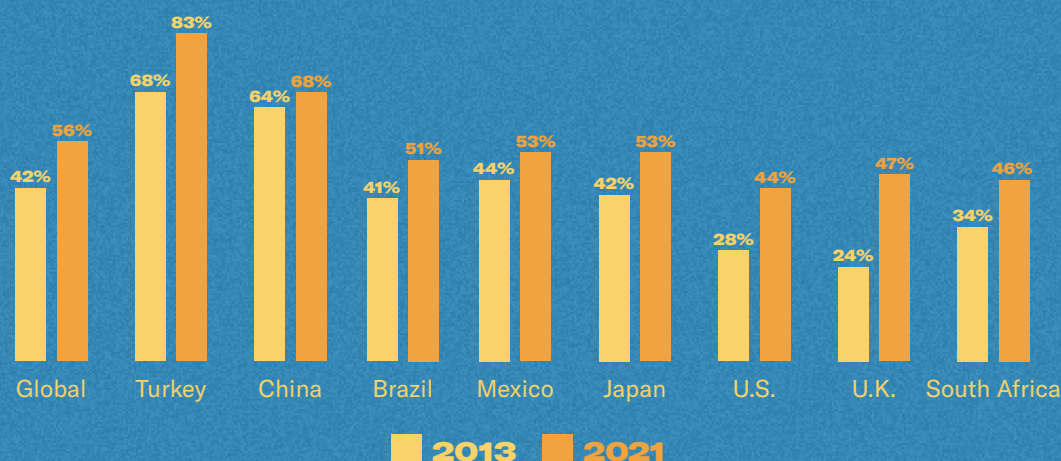
From the fact that collectivist nations have been far more successful at combating the spread of COVID-19 to the realization that wellness is a societal issue, we can conclude that more communal caregiving is needed.



# 3/4

say that they  
need to focus  
on themselves  
before others.

### Wellness is a Community/Societal Issue Not an Individual Issue/Goal



The burden of achieving wellness today can be too immense for anyone to tackle on their own. As Yale Professor Laurie Santos points out, “We think it’s only about a nice bubble bath or a glass of wine alone, but the research shows that effective self-care often looks a lot more like community care.”



### Provocation

Every brand will need to consider the vision of community that drives their business—both within the organization as well as how the company shows up in the world? How do we help to facilitate this transition from self-ish care to communal caregiving?



## Conclusion

# From Quick-Fix Culture to Anticipating Tomorrow

There is little doubt that the contemporary world is largely governed by short-term future objectives and solutions. The global culture of wellness should be a firm exception to this short-termism given that prevention is fundamental to the achievement of long-term individual and collective wellness.

In late 2019 and early 2020, the world was ambushed by a series of system-wide breakdowns due to the spread of the global pandemic. The citizens of countries around the world scrutinised the responses of their governments, with **only 1 in 3 people convinced that their government was prepared (falling to 1 in 8 in Japan) and a further 51% losing trust in their national government.**

People around the world hoarded and stockpiled. A company by the name of **Survival Condo** saw **a 500% growth in sales during 2020.** The standard time frames of wellness culture (5day, 7day, 30-day increments) shifted towards envisioning a future that is 10-20-50 years in the making. Certainly, some people and even cultures are more disposed to a futurist mindset:



### FUTURIST: 71%

of people in South Africa say that they think about how their choices today will impact their health and wellness tomorrow.

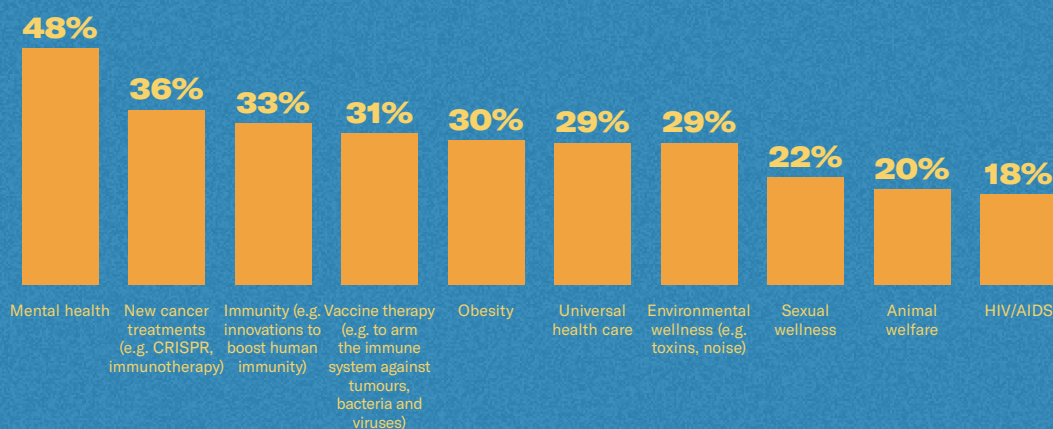


### PRESENTIST: 60%

of people in China are more likely to say that they live for today and do what feels good in the moment.

When it comes to the future of wellness, the impact of the pandemic is clear when we ask people about what they believe should be the global priority. While the highest ranked priority is mental health, three of the top five priorities are dedicated to immunotherapies—that is, the body's system for anticipating illness and enabling wellness.

#### Global 2021





Further, when we provided people with a whole list of sci-fi innovations, from the insertion of microchips to replacing food with a pill, the most common choice around the world was erasing bad memories. Even more interesting is that people around the world today are more ready for sci-fi innovations than they were 10 years ago.

So it's probably no surprise given this anticipation of a more well world that **60% of people say that doctors should spend more time looking at prevention rather than cure**. This anticipatory mindset will not only inform better efficiencies in current preparedness efforts, but also bolster investments in precision health care and predictive systems. This will require that brands establish networked mechanics enabled by precision, personalisation, participation, and prevention—the 4Ps of healthcare.



## Provocation

To go even further, what would our product look like if designed for life? What does our consumer journey look like if it's set up for the long-term? What services can we provide if we are in the business of anticipating wellness needs as opposed to patching over the symptoms of today?

## Methodology

McCann Worldgroup's *Truth about Wellness 2021* study builds on 10 years of trended global data and research about the shape, role, and meaning of wellness in people's lives. Conducted by McCann Worldgroup Truth Central, the organization's global intelligence unit, this large-scale time-series quantitative study surveyed more than 48,600 people in 26 countries\* and builds on two prior editions of the study published in 2013 and 2015. For the qualitative component of the 2021 research, Truth Central built an online ethnographic community of over 1,000 respondents across 24 markets and ran a Global Wellness Truth Hunt across 10 markets.

### 2021

**Wave 1 (2019):** 32,000 interviews in 26 markets (U.S., Canada, Puerto Rico, Mexico, Peru, Chile, Brazil, Argentina, U.K., France, Germany, Italy, Spain, Russia, China, India, Hong Kong, Japan, Philippines, Thailand, Australia, UAE, Turkey, Nigeria, South Africa, Colombia)

**Wave 2 (2020):** 11,800 global interviews in 18 markets (U.S., Canada, Brazil, China, France, Germany, Japan, Mexico, Spain, U.K., Argentina, Chile, Colombia, India, Italy, Russia, South Africa, Turkey)

**Wave 3 (2021):** 4800 global interviews, 8 markets, (U.S., U.K., Brazil, Japan, China, Mexico, Turkey, South Africa)

## Want to learn more?



To learn more about our work please visit  
[www.mccannworldgroup.com/about/truth](http://www.mccannworldgroup.com/about/truth)



For any follow-up requests or questions, please contact us at  
[truth.central@mccann.com](mailto:truth.central@mccann.com)





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