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Healthusiasm

The Healthusiastic person

People want to transform themselves to become as healthy and happy as possible. The personal drivers have been discussed extensively in previous chapters, and an explanation given of how Healthusiasm results in the preference for brands and companies that facilitate transformation. But who are these Healthusiastic people? Are they patients or consumers? Are they Millennials, Gen Xers, Baby Boomers or perhaps even part of the Silent Generation? Should companies take into account the expectations of women rather than men? This chapter will explain the different – or perhaps similar – behaviours in these categories in the light of the Healthusiasm trend.

Generational likeness

Generational differences have always existed. But in recent years, the assumption is that the differences have grown because of the rise of technology and variation in uptake from one generation to another. As younger generations have been raised with these new technologies, they are perhaps more likely to have adopted them. But is that really the case? And do these differences also apply to the Healthusiasm trend for which technology is often used? I beg to differ. Starting with the youngest generation, I will summarise the main characteristics of each generation in relation to attitudes towards health and happiness.

Centennials

The youngest generation was born between 2000 and 2015. This means that very few of them have reached adulthood. So should we pay any attention to these kids when analysing Healthusiastic people? They are not likely to have many health issues, and are probably not interested in instilling healthy behaviour yet, are they? That may well be true, but there are other reasons to conclude that this generation does in fact carry some weight.

In 2019, this generation, which is also called Gen Z, represented almost a third of world's 7.7 billion people. For certain brands, Centennials are therefore one of the largest and most influential audiences to reach. On top of that, the behaviours of Centennials is an early indicator of what is to come in the next decade, which helps brands and organisations to prepare for the future. Another reason to pay attention to Centennials is the influence they have on their parents (see below), whose parenting style is characterised by recognition and appreciation of their children's opinions. As Gen Xers (see page 68) were the first children with both parents working outside the home, they decided to approach their own children differently and offer them a lot of influence in family decisions. As a result, the lifestyles of Centennials are already relevant today when describing the Healthusiasm trend.

The top priority for Centennials is the pursuit of fulfilment. Self-expression and improving the world are their 'status' symbols. However, Centennials don't just want to connect with brands that define a certain lifestyle, but with those that support them in achieving their goals. It's about transformation and self-actualisation. The study "Getting to know Generation Z" by Barklay and Futurecast (2017) explains very well that Centennials are more likely to purchase branded products that make them happy. They share these ideals with millennials but approach them from a more pragmatic – and less idealistic – point of view. Living in a mobile reality during their formative years, this generation has never known anything but pragmatism and convenience, so they won't settle for anything less. If what they are searching for does not provide instant gratification, they are gone. Brands and companies should be loyal to them, not the other way around.

How can your company be loyal to your customers?

Instead of enjoying the present, Centennials are more concerned about their future than other generations. Their perception of reality leads them to think ahead and prepare. Stability and safety are more important to them because of the slow-moving economy since the 2008 financial crisis. Centennials are therefore more risk-averse and mature. They display responsible behaviour and are very interested in their own health and well-being. This generation smokes, drinks and parties less than other generations at that age, often claiming that self-care is a much bigger deal for them. After all, the risks and downsides of those activities have been drummed into them at school, at home and in the media from an early age. But they also firmly believe they have other, more important things to do than going out. An entrepreneurial focus is evident in their drive to learn new things. However, they opt to learn something themselves or through a more efficient, non-traditional route than schools.

This generation wants to live life to the fullest, while approaching it in the most *pragmatic* way possible. They realise that they have to make choices to attain this, but they will always prefer *stability* and safety over freedom. As you will discover in the next paragraphs, Centennials can therefore be considered as "Millennials on steroids" with a hint of the values that baby boomers approve of.

Millennials

Millennials are just as interested in health and wellness as the Centennials are. This generation, born between 1980 and the late 1990s, grew up when obesity was at an all-time high. During that period, technology enabled greater access to health and wellness information and put personal health monitoring into the palms of their hands. Health is a daily, active pursuit for Millennials. It's part of their persona and general interest.

With the presence of social media in their lives, healthy living, and radiating joy and beauty as a result, even gives social status. No wonder Millennials are eating more healthily and exercising more frequently than older generations. They also smoke less and drink alcohol less regularly. It's a lifestyle choice that is intrinsically interwoven with other activities. Together with the Centennials, Millennials are therefore often labelled "the most health-conscious generation ever". But it is important to note that this is not particularly due to the fact that they have more time available as they are unlikely to be married or have children yet – rather, it's an intrinsic part of their life.

For Millennials, **working out** is not about leisure or the chore of staying slim and getting fit. This is the generation that grew up with 'exergames' like Dance Dance Revolution, the Wii Fit console and, later, Zombies Run and Pokemon Go. For Millennials, exercise is a social, fun experience. Think about community-based workouts that are quick, yet effective, like SoulCycle, Crossfit and High Intensity Interval Training. With these innovative classes, fashionable activewear and social platforms, exercise is about the lifestyle attached to it. That explains why they are spending relatively more of their income than older generations on health and fitness, even while they are earning less.

One quick look at Millennial social media feeds showcases that **healthy eating** is as much part of their lifestyle. Instagram soon tells you that Millennials are a food-loving generation that embrace the eating-in, dining-out and takeout food trends. Compared to other generations, they have a "fewer meals and more snacks" approach to eating and are interested in a diverse range of flavours from various ethnic and cultural backgrounds. Millennials crave the convenient, healthy, and unique taste experience. They are increasingly reading food package labels and are avoiding food additives. However, Millennials are less concerned with scientific claims, and instead seek out locally produced, organic, non-packaged, unprocessed food. They want to know more about how food is grown and prefer their food to be sustainably farmed or produced. In their search for healthy foods, Millennials can be influenced by advertising, reputation, and experiences in which they recognise the personal lifestyle they aspire to. But these 'digital natives' are likely to seek confirmation from online information, reviews, and recommendations from their own online social networks.

Millennials behave similarly when looking for medical information or **healthcare providers**. As with exercising and healthy eating, they pursue unique experiences and the convenience to connect (with physicians) via technology. As health is part of their persona and general interest, they want to build a personal and individual relationship with their healthcare professional. This type of participative relationship makes Millennials very loyal to their healthcare network. However, one negative experience might quickly cause them to make a change.

Generation X

While *individuality and lifestyle* is the predominant currency that matches with Millennials, *time and energy* can be perceived as the greatest need for Generation X. Born between the mid 1960s and the late 1970s, this generation grew up when the divorce rate tripled, and mums went to work en masse. Gen Xers were brought up to stand up for themselves and became independent at a very young age. Most Gen Xers are now at the peak of their career. At this stage in life, people generally focus on leading more fulfilling lives. But at the same time, they are managing their time and energy to be able to meet the expectations of their husbands, wives, children, colleagues and friends. No wonder Gen Xers are increasingly making healthy choices to gain or maintain energy.

As Gen Xers have a tendency to be knowledgeable and make informed choices, people from this generation are considered the first true health consumers. They typically shop for healthcare the same way they shop for retail goods and services and use more information sources than other generations when making decisions. With their limited time in mind, this group tends to select activities that are done when convenient for them. There is less interest in team or individual **sports** that require a lot of time and planning. For example, having a home gym simply means increased efficiency for them in saving valuable time. For that reason, many go out running or biking by themselves, equipped with wearables to track their progress. The added value of having a personal coach, on the other hand, is gaining popularity in this generation, particularly because of the increased impact of both training and nutritional education.

As with working out, Gen Xers seek convenient **food** that requires less preparation time. Although they also like international foods, they are convinced that food is about more than just taste. Food is about maintaining or gaining energy. As they want to make conscious food decisions, they actively seek information online, including ratings and review sites. A particular focus of their search may be on the reputation and public perception of a brand, but they mostly read labels and nutritional information. After all, they are looking for healthy foods that boost their energy. Many Gen Xers therefore rather prefer all-natural products, and are even willing to pay more for them.

Regarding their medical situation, Gen Xers choose to visit a physician based on their reputation and experience. It should come as no surprise that this generation will have done significant research prior to an appointment with a **healthcare professional**. This may include information about potential diagnoses and treatment options found on the internet. Because of their limited time, Gen Xers are seeking direct communication with their doctors and pharmacists. They have short-term expectations and won’t hesitate to switch healthcare providers based on their experience.

Baby Boomers

Compared to Millennials, for whom health is part of their lifestyle and persona, Gen Xers are increasingly consciously making healthy choices to gain more energy. Baby Boomers, on the other hand, are increasingly health conscious because they are dealing with more chronic illnesses as they grow older. This generation, born before 1965, rode a roller coaster of change during their youth, witnessing the Vietnam War and the moon landing from their living room television set. They grew up in an environment of rapidly developing diagnostic technologies and surgical therapies and they were the first generation to have access to immunisation and antibiotics.

But Baby Boomers were also brought up to create an impactful change and set out to do so. Think about how they pushed against the status quo, raised their voices by protesting against the war and advocated for women's rights. *Impact* typifies this generation. And as they grow older, this generation is increasingly preoccupied with disease prevention. They want to impact their own health by focusing on overall wellness and healthier lifestyles.

One of the most obvious signs of Baby Boomers living more healthily is the current popularity of **fitness** within that generation. With a growth in memberships of 500% in the past decade, Baby Boomers are the fitness industry's main customer at present. But this generation is not new to fitness. They saw the advent of aerobics, the rise of bodybuilding, and the popularity of jogging in the eighties. But while fitness eventually became an expression of pop culture (think lycra, leotards and leg warmers), the early pressure on boomers to exercise didn't have feel-good roots. It was caused by angst over decreasing fitness levels, and the surge in heart disease and cancer rates. Typically in this generation, their ambition was to have an impact on their own life, as well as on the lives of others. Baby Boomers changed the world with ground-breaking AIDS bike rides and breast cancer walks raising millions for worthy causes. They led an unprecedented fitness revolution towards a golden era of health. And now, they are doing it over again with the aim of living and ageing more healthily.

Baby Boomers have the highest BMI of all generations. **Healthy eating**, first in terms of portion size, is very important for this generation. But health concerns play an even more important role in their choice of food. Because of the prevalence of chronic diseases (such as high cholesterol, high blood pressure, diabetes and osteoporosis) in this generation, their choice of food is strongly influenced by the sugar, salt and fat content of products. As this generation did not grow up with takeaway meals or fast food, avoiding these was already a natural reflex. But that does not mean Baby Boomers are not interested in the nutrient, fibre and probiotic breakdown of foods. In fact, the majority of this generation checks the ingredient list on product packaging. This confirms that Baby Boomers are looking for ways to *impact* their own health.

While Baby Boomers grew up without the prevalence of technology, they cannot be considered technologically ignorant. In fact, most have embraced technology and are active internet and social media users. This generation engages more with technology than is often assumed and seeks health information online as often as other generations. But when addressing their health concerns, many of their searches tend to be more focused on treatments, medications, side effects, and risks. This does not mean they won't ask their **healthcare providers** many questions. But they want to be sufficinetly informed to be able to ask the right questions to impact their health. Following their doctor's visit, they are sure to research the doctor's recommendations as well as additional health information online.

Although the pursuit of healthy living is clearly not unique to Baby Boomers, the decision to impact their lives with a health and wellness focus has driven permanent changes in today's society. After all, in addition to making decisions about their own health and wellness, Baby Boomers are also likely to act as caregivers for their parents (Silent Generation) and as advisers for their children (Gen Xers or Millennials). Because they influence other generations to such a great extent, the increased enthusiasm among Baby Boomers for living an active healthy life is often considered one of the most *impactful* changes in today's world.

Silent Generation

One of the biggest influences of Baby Boomers is clearly seen on the Silent Generation. Of course, this generation is not considered the most trend forward group. With only about half of those aged 75+ using the internet regularly, this is the lowest penetration of all generations. However, the Silent Generation is very much engaged with their health and happiness, although in more traditional, mainstream ways. They also have a broader definition of health and wellness than younger generations. It goes beyond physical health and good looks. More than other generations, it encompasses relaxation and feeling positive about oneself.

Enjoying time with loved ones is the most important driver of health for the Silent Generation. It's about aspiring to well-being and health, even if one's physical condition is not what it used to be. To achieve this, they still rely on their doctors to manage their personal healthcare and seek health information directly from them. Compared to other generations, they have not changed their views on health management that much, but they are more conscious of their actions. The Silent Generation doesn't easily buy into contemporary health and wellness views but sticks to traditional health advice (avoiding fat, salt, excess sugar, processed meats, and full fat dairy). But taking vitamins and minerals in supplement form perfectly complements their traditional thinking on health and wellness. More than ever, those aged 75+ are consciously engaged with their health, as this Silent Generation still wants to *enjoy* life as much as possible.

Conclusion

When briefly analysing the different generations, it becomes clear that people today are enthusiastic about managing their health and happiness. The majority in each generation claim to be eating healthier than the year before, and even more report planning to eat more healthily in the future than they do today. Regardless of our age, we are indeed interested by and occupied with our health. *Individuality and Lifestyle* might be the most important driver for Millennials, while *Energy and Time* is seemingly driving the choices of Generation X. Baby Boomers want to *Impact* their own health and happiness as well as that of others. The Silent Generation just want to *enjoy* as much as possible. Whatever the driver, compared to the same age group a couple of decades ago, people are more consciously managing their health. After all, isn't that why we say that 40 is the new 20, or that 60 is the new 40?

But while this chapter highlights some obvious generational differences that are mostly related to the education and environment of their specific time, it is important to note that in our society demographic models based on age, for example, no longer stand as the sole truth. Even if there seems to be a common driver within one generation, it remains important to realise that today's reality often and easily allows for non-traditional behaviours. Thanks to the opportunities offered by the waves of digital disruption, people of all ages are creating their own lifestyles and identities. Old conventions no longer stand. People from different generations are not necessarily behaving as they "should".

Let's face it: we all move in a world of shared information, ideas, and culture. Everyone has access to a universal offering that does not differ according to age. Society no longer dictates lifestyles by your age, gender, sexual preference or other demographic characteristics. This "Post-Demographic Truth" means that it is increasingly possible for us to express our own individuality and be who we want to be, rather than according to our demographics. In a world where self-actualisation has become the most relevant need for people, it makes perfect sense that we will take up the behaviour that best fits our aspiration to health and happiness.

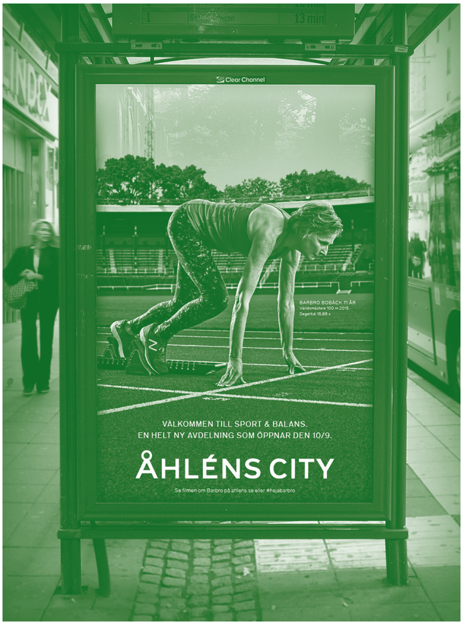
Could you let go of solely focusing on the demographics of your customers, and rather focus on who or what they want to be(come)?

What does this mean for brands and organisations? It is important to take into account where people are coming from demographically, but more so, where they are going or who they want to become. The message of this chapter is that regardless of the different backgrounds of each of the generations, all generations are focused on improving their health. All generations want to become the best version of themselves.

> *Swedish retailer **Åhléns** has understood this trend very well. The store is known for its wellness concept, Sports and Balance, which aims to provide customers with the clothing, equipment and even books to live an active and healthy lifestyle. Keeping in mind that the trend of focusing on improving health is common to all generations, the store promotes its wellness concept across them all. Daniel Karlsson, store manager at Åhléns City Stockholm, explained that their customers want an active lifestyle throughout life, regardless of their age. Training is an increasingly important part of their customer's life, with health and happiness being a more important driver than appearance and body image. Knowing that the Baby Boomers are the biggest customers of the fitness industry, they used Barbro Bobäck as the face of their campaign in 2015. Bobäck wanted to live a more active*

life so she took up running. It is important to mention that she was 68 when she did so. Three years later, she won gold at the Veteran World Championships, becoming the world's fastest 71-year-old. In using Bobäck as the face of their Sports and Balance campaign, Åhléns confirmed to the fastest growing fitness generation that it's never too late to get active. However, as the trendy activewear could just as well be worn by Millennials, it also indirectly promoted a healthy and active lifestyle that speaks to all generations. If she can do it, so can you.

What generation of your customer base or patient population could be more interested in your offering than you currently assume? Or what generations could amplify what you stand for?



The world's fasted 71-year-old for Ahlens. Campaign made by Forsman & Bodenfors (https://forsman.co/).
Picture made by Eric Josjö at Söderberg Agentur (www.soderbergagentur.com).

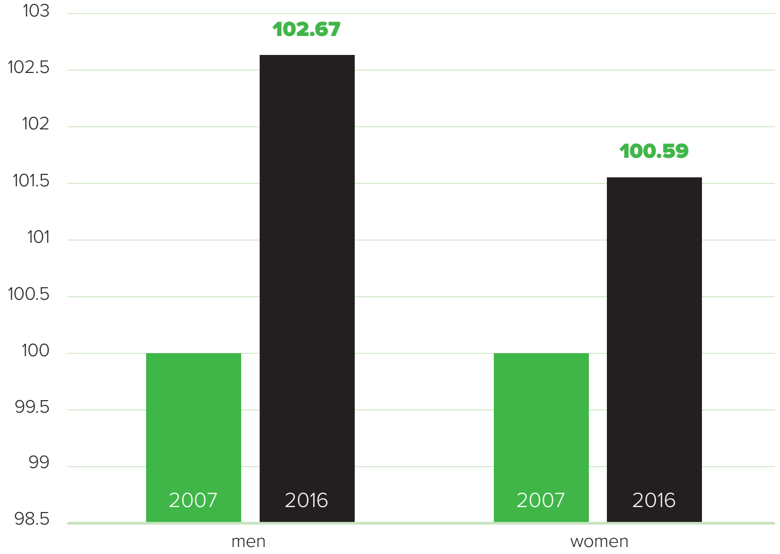
The similarities between sexes

It certainly is interesting to look at the sex of the Healthusiastic person. Are there any differences between men and women in their health behaviour? Is one sex or the other more inclined to embrace this Healthusiasm trend? I beg to differ (again). Of course, the health of men and women is not the same. For example, life expectancy of women is currently higher; men tend to have more life-threatening chronic conditions like coronary heart disease at a younger age; and as women live longer, they are more likely to develop debilitating diseases like arthritis. To some degree, the gender gap in health is related to the different genes, chromosomes, hormones and metabolism between the sexes.

But a significant part of this gap has always been induced by social and behavioural differences. Throughout their lives, women and men adopted behaviours that were strongly influenced by their social context. People have always followed their stereotypical gender roles. Men were more exposed to stress and hostility because of their focus on work. Women had a much larger and more reliable social network. Men took more risks and are more often exposed to aggression or violence. Women generally took responsibility for the household meals and ate far more healthily than men. On the other hand, women exercised far less often. Do these social and behavioural differences explain the difference in life expectancy? Can it still be concluded that women live healthier lives and are more susceptible to the Healthusiasm trend? The Medibank Health Index Score answers these questions.

> *This initiative by **Medibank** in Australia aimed to measure and track national health by observing changes across seven aspects of health (nutrition, fitness, BMI, medical health, mental health, smoking and alcohol). The Health Index was started in 2007, at a base of 100. On behalf of Medibank, Roy Morgan Research talked to approximately 1000 Australians each week, to gather hundreds of details about their health, from the food they eat, to the exercise they do, and the bad habits that might be holding them back. The latest results published in 2016 indicated that the overall health of men and women had grown by about 2% in the past 10 years. However, counter to the expectation that women live more healthily, the Medibank Health Index Score also showed a higher score for men than for women. We all simply want to live more healthily, regardless of our gender.*

Are you working with stereotypical gender beliefs that might be worth rethinking?



Medibank Health Index (2016). For more info visit www.healthbrief.com.au
Research conducted by Roy Morgan Research from July 2014 – June 2015.

Conventional perceptions of differences between the sexes are no longer to be taken for granted. As explained in the generational differences, men and women are creating their own lifestyles and identities. They do not necessarily conform to the usual social roles, nor are they behaving as previously considered normal. More and more women are riding Harley Davidson motorbikes. Powerlifting and cycling have become some of the most popular sports for women. Men take up yoga more often than women do, and are more open to grooming than before. Men are also more often responsible for cooking the meals at home. What's more, there is now no social taboo governing these lifestyle or hobby choices. There is more freedom, more choice and more social acceptance.

Conventional social behaviour no longer holds. It is difficult to predict the impact this might have on the health of men and women. But it certainly will have an impact of some sort, at some point. One clear example is this: historically, men were more likely to drink alcohol, and in amounts that could damage their health. In fact, men were three times as likely to develop alcohol-related problems. A recent study published in the *British Medical Journal* (2016) reported that women now drink as much as men. While the researchers did not investigate the exact reason for this trend, the authors assume that the changes in women's roles could be an important explanation. No wonder more businesses are moving away from the stereotypes for men and women.

> ***HIMS*** *understood very well that it was time to throw out old thinking on who is likely to engage with health and wellness products, services and experiences. This New York start-up is a lifestyle and wellness brand for men, whether they're 18 or 70 years old. HIMS is a one-stop shop for advice, medical care and products, covering anything from hair, skin and nutritional products to erectile dysfunction solutions. It's stylish and trendy, and it's for men only.*

Hims. Handsome. Healthy you. Source: www.forhims.com

Is there a part of your product offering tailored to one sex that might speak to customers or patients of the opposite sex, if appropriately targeted?

*Several companies have grasped the opportunity of the growing number of men doing yoga. **Moon & Son** offers stylish apparel for men who practise hot yoga while **Lululemon**, the established yoga apparel brand, partnered with Vancouver's **Stanley Park Brewing** to produce a lager. It reinforces their image and helps attract the attention of their new male customer. But as the differences between sexes have diminished, the Lululemon craft beer also speaks to women.*

Do you know what part of your business could (have) become more unisex than before?

*To reinforce the shift from stereotypical gender behaviour, the Belgian translation agency **ElaN Languages** has included an "unbias" button in their translation software. They strongly believe that languages all over the world contain gender biases. According to a long line of linguistic research, these words actively influence behaviour, actions and perceptions. Now, their software offers unbiased translation of gender biased words, such as firefighter (fireman), mail carrier (mailman), police officer (policeman) and birth assistant (midwife). With their software, ElaN Languages helps to create a gender balanced world for mankind... Sorry, humankind. It reinforces the freedom to take up any personality, identity and behaviour one desires.*

This does not necessarily mean that men and women currently behave in exactly the same way, health-wise. For example, according to PEW Research Centre (2019), women are more likely to express a strong interest in health and medical topics, and men, in science and technology. But most of the studies I researched for this book found only slight differences between the sexes. One sex does not generally behave in the opposite way to the other. It is important to understand that the differences are merely nuances.

Health perception

Let's start to highlight these small differences by looking at how men and women perceive health in itself. Today, both sexes understand the connection between diet, exercise and health very well. Lifestyles are indeed changing, with a new emphasis on healthier diets and regular exercise. However, women tend to consider health more as a "difficult and complex project" associated with maintaining an appropriate body shape. Women are more worried about their body. This focus on appearance is also why they tend to rate themselves less healthy – and more health conscious – than men. Men rather connect health with being fit and with the ability to do physical activities. They are also less likely than women to perceive themselves as being at risk from illness, injury, or any other health problem, despite historically having more chronic diseases and dying at a younger age.

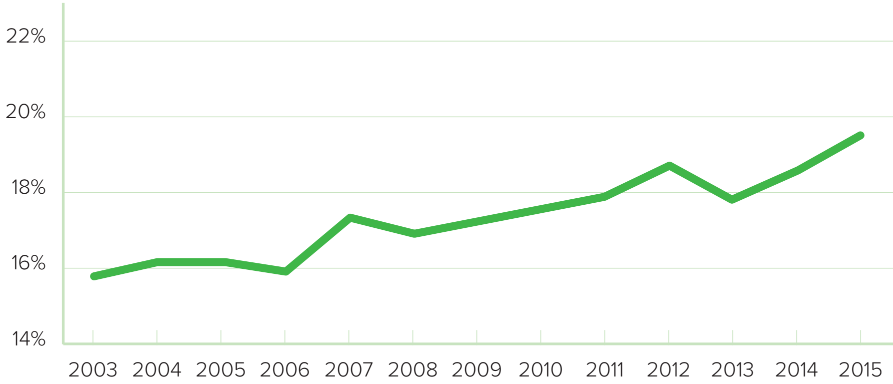
Sport and exercise

Some small differences are also present in the approach of men and women to sport and exercise. As can be assumed, sport has always been a big part of the lives of most men. Since boyhood, exercise was a fun, competitive pursuit that allowed them to spend time with friends. You will indeed encounter more boys in sport clubs than girls. But while there is a bigger difference between boys and girls, the gender gap narrows significantly with age. When older, men practise only slightly more sport than women, and do similar amounts of physical activity, such as walking, biking and gardening.

One of the most visible habits in society today is that many men and women are engaged in exercise. A study conducted by Ipsos (2017) confirmed this very strongly as no less than 89% reported exercising once a week. But even more important is that the popularity of exercise has grown significantly in the past couple of years. According to the US Bureau of Labor Statistics, 19.5% of the population aged 15 and older participated in some form of exercise on an average day in 2015, while participation was 15.9% in 2003. This relative increase of about 22% over 15 years really showcases how both men and women are increasingly managing their health with exercise.

What recent evolutions might have been under the radar but could actually be a sign of a radical shift that will impact your industry?

PERCENTAGE OF POPULATION ENGAGED IN SPORTS AND EXERCISE ON AN AVERAGE DAY, 2003-15



US Bureau of Labor Statistics (2016)

Food

There are both similarities and differences related to food as well. Both men and women believe that you are what you eat, but they do have somewhat different eating habits. Women tend to eat more fruit and vegetables, yoghurt and diet drinks. They have a greater interest in healthy diets and often consume food that is lower in energy value than men. This might be explained in part by the fact that women are more concerned about appearances than men are. Women are also generally more aware about eating-related issues and are more often motivated to adopt a better diet. In restaurants, women are more likely to order the healthiest options on the menu, such as sushi, salads, and vegetarian dishes, while men are more likely to order meat or poultry. In fact, men generally eat more meat and bread than women. They also typically consume more sugar-sweetened beverages, wine, beer, and high-protein foods.

Regardless of these nuances, both men and women take responsibility for their health and food plays an increasingly important role in managing it. Nielsen's 2015 Global Health & Wellness Survey, which polled over 30 000 individuals online, found that the mindset of men and women on healthy foods has shifted substantially in recent years. Most are willing to pay more for products that boost their health and help with weight loss. James Russo, SVP Global Consumer Insights at Nielsen, explains that while economic concerns remain important for consumers, health and wellness concerns are at the forefront of their purchase decisions. Russo also mentioned that consumers progressively understand a food's nutritional value or the overall health risk associated with it. The majority in both genders actively make dietary choices to help prevent certain conditions, such as obesity, diabetes, high cholesterol and hypertension. About 75% of both men and women indeed often read labels carefully for nutritional content. The fact that men and women want to know more about the foods they consume also explains why companies now mention health benefits more often on their packaging and labels.

> ***SmartWithFood*** *supports those who try to interpret incomprehensible packaging labels to strive for balanced nutrition. It offers them customised and automated advice while shopping. As a start-up within the Belgian retailer Colruyt Group, it has a clear goal: consumers need to have easy access to food products that meet their personal requirements and lifestyle. Taking into account intolerances, allergies and preferences, SmartWithFood supports the customer in finding suitable products. Moreover, SmartWithFood also focuses on families in which everyone has their own preferences and nutritional needs. Using the app, you scan the barcodes of food products to check whether the ingredients match the preferences of the various user profiles. For example, if a product contains potential allergens, such as lactose, that negatively match the active profiles, the app shows alternative products that are safe to consume. SmartWithFood draws its data from product information from different databases, and is also assisted by a team of experts, such as dietitians, retail experts and IT specialists, who complete the data in the scan results.*

Healthcare

If asked about their health, both men and women generally report very good to excellent health. However, women seek medical care more often than men. They tend to visit a general practitioner more frequently. Even when health problems do show up, men are less likely to immediately consult a healthcare professional. Stereotypical social behaviours may still play a role here as men used to be taught to deny and ignore pain. However, when men do decide to seek healthcare, they prefer to seek hospital care while women see a primary care doctor first.

Conclusion

When brands or organisations are looking to bring health products, services or experiences to their customers, they shouldn't automatically assume they will fit one sex only. However, it might be worthwhile to reflect on behavioural nuances in order to communicate effectively to each sex. Don't oversimplify by assuming that the sexes behave in opposite ways. Behaviour is no longer dictated by gender stereotypes. Both sexes want to impact their own health and happiness.

The patient revolution

While a large part of the book discusses people in general, the question of whether or not a patient is Healthusiastic can also be raised. In the past, patients have always been seen as passive regarding their health. The doctor was the most important person in town, and patients simply followed their recommendations. The only thing patients needed to do was remember to take their medication on time. But the patient is evolving into an active participant in their own health. This chapter will explain how I see the patient advancing through the different stages of engagement.

The Informed patient

The behaviour of patients has radically changed in the past two decades. The first wave of digital disruption brought search engines that offered multiple sources of information. Patients were then able to search online through vast amounts of health information, even before being diagnosed. Early in this first wave of digital disruption, more than 80% of the population regularly looked up health information on Google. It was (and still is) the most popular activity online, topped only by sending emails. The reason for this popularity is obvious. Patients often lack the information they so sorely need. That's why patients in particular soon became active. However, informing themselves about symptoms and diseases was generally not beneficial. While looking up common symptoms, they tended to come across information about severe diseases. Doctors confirm that the early days of Dr Google were characterised by self-diagnosed patients anxiously entering their rooms. One of the main reasons was that very little of the medical information online was of sufficient quality. Some may argue that this situation still stands. But the difference is that the healthcare industry was barely present online 15 to 20 years ago. Most information came from sources that could rarely be traced to a medical or healthcare professional, and nor was it medically validated. This led to self-diagnoses that were not often based on medically sound information or reflection. A second reason is related to the novelty of this information source. Online publishers were not fully aware of the impact their information might have on the average user, nor did the patient know how to navigate the abundance of health information. People tried to be "informed" but often became misinformed.

Your customer certainly lacks some information or is somewhat confused by the information available. What obvious expertise, residing in your organisation, can make them more knowledgeable?

The empowered patient

Even today, an astonishing 1% of all Google searches are symptom-related. Without a doubt, there are still cases of self-diagnosed patients anxiously storming into their doctor's office armed with the results of Google searches. But it is no longer as dramatic as in the early days. People now find their way to more reliable health information, specifically tailored to patients. Most patients nowadays also realise that not all information necessarily applies to them, even if it may seem so at first. But while Rock Health (2016) reports that 56% of patients still search symptomatic information prior to consulting their doctor, patients now go online more actively after their visit to the doctor. This allows them to look up information they might not have understood very well during the consultation. One's reaction to a diagnosis can be so emotional that it blocks the ability to remember what was said. Also, receiving lots of medical or technical information may be too much to digest immediately. Patients can now go online to find more in-depth information and so better understand the brief conversation with their healthcare provider. It allows them to find more information on causes and effects of their condition as well as ways to deal with it. Often, the doctor has referred them to appropriate online sources. With this information, patients become knowledgeable and "empowered" about their own health.

> *There are a couple of well-known websites that focus heavily on empowering patients.* ***WebMD*** *is an American network of websites, known primarily for news and information on medical, health and well-being. With about 140 million unique visitors per month, it is one of the top healthcare websites worldwide. The content published includes symptom checklists, pharmacy information, drug information, supportive communities and doctors' blogs on specific topics. It has more visitors than any other leading private or government healthcare website, even though it's often criticised for sharing sponsored information. Only* ***Healthline*** *generates similar traffic, longer visit duration, and more page views than WebMD. But that is likely because it mostly focuses on non-medical, non-drug related health topics. They talk to larger crowds of people and stay away from potential pro-pharmaceutical campaigning. Healthline aims to be the most trusted reference in one's pursuit of health and well-being. But while both of these sites generate approximately 50% of their visitors from outside the US, language-specific health websites are of course also very popular within their respective countries.* ***Doctissimo*** *is the leading online health source in France and is also globally one of the most popular health websites. The same is true of* ***Alodockter*** *in Indonesia,* ***Tuasaude*** *in Brazil and many others around the globe. They have become such a go-to reference that they don't even have to advertise. Patients either already know about the website or discover their content when searching for specific health topics. These websites empower patients by answering health questions that possibly weren't handled by their doctors. But they also know how to address patients and health consumers, often cautioning them to talk to a doctor first. They don't just educate about health and well-being, but also about how to deal with this type of information.*

For what specific health or well-being topic could you easily become the reference for, without requiring online advertisement?

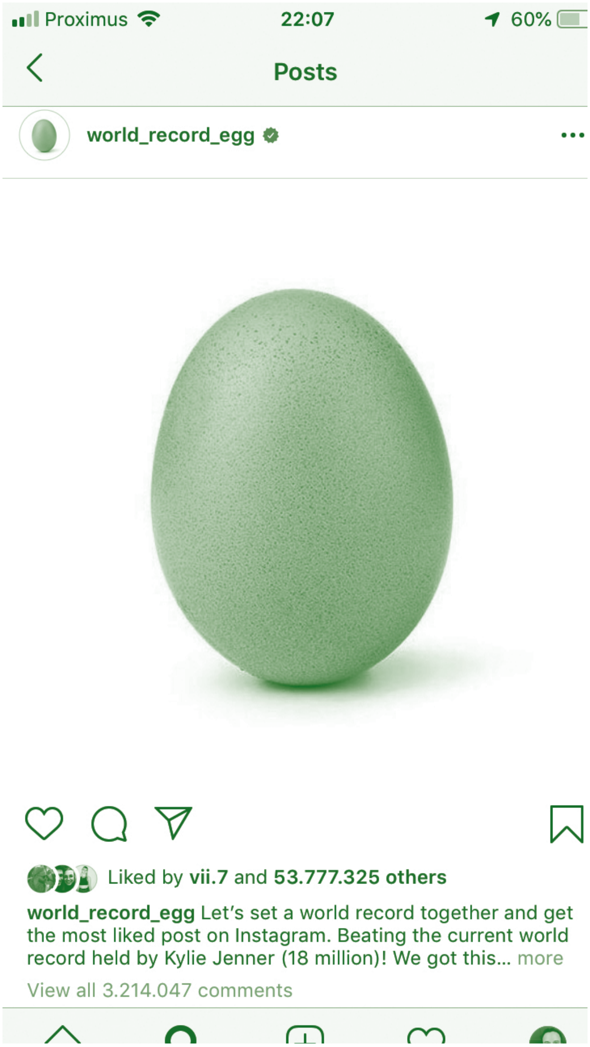
With the second wave of digital disruption, the mobile-first approach made information become available any time and anywhere. It was also the instigator of the success of social networks that were mostly accessed via mobile phones. Social networks made it faster and easier to access information. People only needed to register, connect with friends, post on their profile and comment on topics. Within about 10 years, these networks generated a total of 3.484 billion users worldwide, according to Hootsuite and We Are Social (2019).

Because they really simplify connection and communication, social networks allow you to get into contact with almost anyone you want to – like-minded people, celebrities or even fellow patients. They have given people a voice that can reach anyone potentially interested in their message. And as messages are typically shared as bite-sized chunks of information, they are also easier to digest.

Social networks are having a major impact on the way we inform ourselves, including on health topics. The downside of this two-way communication may be that not all health information is as valuable. Health information shared by non-experts may be confusing or incorrect. As with the first health websites, patients need to learn how to deal with this new type of information, and mostly with its source. However, it does offer opportunities to rapidly increase awareness or to connect with fellow patients. Social networks are really empowering patients.

> *The **ALS Ice Bucket Challenge** in 2014 was probably one of the most successful fundraising and awareness campaigns for ALS, a disease that causes the rapid death of the neurons that control our muscles. The challenge shared on social networks encouraged people to dump a bucket of ice and water over their own or someone else's head as a symbol of the impact of receiving a diagnosis of ALS. Within just a couple of weeks, ALS*

*associations received over USD100 million in donations. The social media success of **Movember**, an annual event that involves growing a moustache during November, increased awareness and annually raises similar amounts of donations to men's health issues such as prostate cancer. Social networks can indeed be very successful in reaching millions. Early in 2019, a simple picture of an egg proved the point. The egg was liked 53 million times on Instagram (the most ever) in a mere couple of days. It turned out to be a mental health awareness campaign.*



The most liked picture on Instagram was actually a campaign for mental health.

Because awareness empowers patients, their relatives and their environment, what is a good cause close to your business that you could be more vocal and social about?

*Social media also empowers patients by helping them to find their peers. Patients really want to share their own experiences. They also are keen to learn from others. The US social network **PatientsLikeMe** was inspired by one family's experience when their brother was diagnosed with ALS. They realised that ALS patients around the world have similar questions about treatment options and what to expect. PatientsLikeMe now connects over 600 000 patients with others who know first-hand what they are going through. Today the website covers more than 2 700 health conditions, with new members joining daily from the US and other countries. By sharing advice, treatments and resources, patients can learn from the aggregated data of others with the same disease. By communicating with others, they receive support that empowers them in their management and control of the diseases. **Carenity** is similarly empowering 150 000 patients across Europe by putting forward patient networks for 900 different diseases. Empowering patients is about bringing relevant information to them. This does not always have to be scientific information. Patients can also be empowered by experiences and even opinions that are practical and relatable, and that acknowledge their emotions.*

In a system largely driven by science and rigid processes, can you make the overall patient experience more humane, by enriching them with relevant, bite-sized, non-scientific insights?

The Active Patient

With the invention of app stores, smartphones started offering tools and platforms to "actively manage" their health. They allowed patients to capture and gather data themselves; they gathered contextual information like activity, steps and sleep in the background; and they also reminded patients when necessary. But at first, the tools in the app stores generated the same difficulties for patients as the internet did in the early years. While there were already 100 000 health apps within the first couple of years, their quality and usefulness was doubtful. It took some time to find the good ones, and for the inferior ones to become better or disappear. But even today, there are still about 320 000 mobile applications that are health-related (spread over two major app stores). Each day more than 200 new applications are added. It remains difficult to find the valuable ones. Clinical grading takes a while and is not yet fully adapted to agile technological product development. That leaves the numbers of users as well as the user reviews often as the only quality indicator for patients. This is very limiting in a sense. But on the bright side, with all these tools and platforms at hand, patients are slowly becoming more and more enabled to impact their own health by "actively managing" it.

> *Diabetes is a chronic disease that requires daily management. If you have diabetes, it is likely that your healthcare provider has recommended that you keep your blood sugar level as close as possible to that of someone who doesn't have diabetes, to eat more healthily and to exercise regularly. These patients used to keep track with booklets, notes, and paper diaries, if at all, which was so onerous that they welcomed convenient tools to manage their disease. Many start-ups jumped on this huge need, but very few offered the right quality and experience. Today, the Austrian MySugr app is probably the most popular among them. Founded in 2012 by diabetic patients who knew first-hand what was needed, it now helps over 1 million patients in 35 different countries to actively manage their diabetes. This FDA approved and CE marked application offers tools to log and track blood sugar, medications, and exercise. Gradually building on these basic needs with gamification, any type of diabetes patient can now gain points by completing challenges. The MySugr app not only helps patients to manage the disease, but to move away from the "Diabetes Monster". It generates a more positive attitude in patients as it enables them to control a disease that has long been considered practically impossible to manage properly. Little won-*

der that pharmaceutical giant Roche, an early investor in the app, became an exclusive shareholder of MySugr app in 2017.

What resources or tools can help your customers or patients to take control of something that feels totally out of their reach?

Adhering to medication also requires everyday management. Many patients with chronic illnesses really struggle to adhere to their recommended medication regimen. People either never take their medication, stop prematurely, or don't manage to take it as prescribed. In fact, about 50% of people on prescription medication don't adhere to their treatment. As medication doesn't work in patients that don't take it, non-adherence is also sometimes called "the silent killer". Statistics show that death from non-adherence to one's own medication happens about 10 times more frequently than from homicide (and is about 30 times greater in those over 50). People find it difficult to adhere to their medication, often because they aren't fully aware of the importance of doing so. During the Digital-First wave, I already created a first medication adherence tool as a web-based information source that sent email reminders. Of course, its impact was limited because people needed to be behind the screen of their desktop. The second wave of digital disruption offered mobile notifications on the smartphones in the pockets of patients. With over five million registered users in 135 different countries, ***Medisafe*** *is the most popular adherence application even though it is not yet medically certified by the FDA or EMEA. Starting as a visual representation of a vintage pill box, it virtually presents the different medications that need to be taken during the day. Notifications prompt patients to take action. The data gathered by Medisafe helps them to better understand patient behaviour and to adapt their application accordingly. By facilitating the right trigger at the right time, Medisafe allowed patients to make an impact on the management of their health. It has made a seemingly impossible "obligation" more convenient and easier to achieve.*

As managing one's health always comes with some hardship, what obvious or hidden obligations could you alleviate by facilitating convenience?

The second wave of digital disruption is also characterised by the rise of wearables. Wearable technology became popular with the Bluetooth headset back in 2002. Between 2006 and 2013, devices like Nike+ and Fitbit were released to track steps. While their initial designs were clip-on devices, their bracelets really became popular in 2014. With the introduction of the Apple Watch at the same time, 2014 is often considered the year of wearable technology. Other wearable devices, such as those that measure blood pressure, track seizures or warn about sunlight exposure, continue expanding the industry. The Medisafe app now also connects to the cap of physical pill bottles via Bluetooth, recording medication intake without needing user responses to notifications like “Have you taken your meds today?” Each of these devices accomplishes passive measurement of vitals, biometrics and actions. And as manual inputting of measurements is seldom (if ever) required, health tracking has become easier or even “ambient”. With these wearables now connected to our smartphones, they are starting to generate a dashboard of our health.

> *If you've attended one of my keynotes over the past few years, you might remember me comparing health management to the way we manage our cars. Just a couple of decades ago, our cars weren't equipped with sensors providing direct feedback about their status on a dashboard. Back then, we were supposed to do an annual check-up that obliged you to leave your car at the garage for a couple of days. On returning the car, the mechanic couldn't really give you any guarantees about its functioning, even in the near future. But according to him, everything “looked” good. If your car suddenly didn't start, it was difficult to know what was wrong. A mechanic would need several days to figure out the cause of the problem.*

Nowadays, our cars have several dozens of sensors that connect to the dashboard to give us its status immediately. Is there enough petrol? Is the battery still charged? Are our rear lights still working? Even before our tyres run flat, our car will warn us. Some cars even have services that track their status remotely so that the driver is called and assisted if necessary.

Today our health still largely depends on those annual check-ups. Just as our car did several decades ago. Once a year, you have your blood checked at your primary healthcare provider. It takes several days before you receive the results and the doctor can't give you much of a guarantee about the near future. But everything "looks" good. If something suddenly goes wrong, it's difficult to know what exactly has caused it. A doctor might need several days or weeks to figure out the true cause.

Wearables are slowly making a change to this situation. For example, the Apple Watch now measures your heartbeat every few minutes. Compared to your doctor who listens for 30 seconds a year during the annual check-up, this watch now feeds a lot more information on the heart into a dashboard on your smartphone. It builds up information about the status of our health, to a much greater extent than before. Similar to the dashboard in our car, notifications can even warn us if our heart rate exceeds a certain pre-defined limit or when irregular rhythms are identified. While it cannot predict a stroke or a heart attack at present, it's only a matter of time before wearables will be able to feed our dashboard with this predictive information. With about 50 million people walking around with Apple Watches, more people, whether in good health or otherwise, have the tools and dashboard to actively monitor their heart and health. Several other devices and companies are following the same path towards the creation of an active health dashboard.

Is there any type of information or insights your customer would benefit from, if unlocked and displayed to them?

The Connected Patient

Patients grabbed the opportunity of being "informed" and "empowered" during the first wave of digital disruption. With the second wave of digital disruption, patients are collecting data and "actively managing" their health with mobile solutions and wearables. This marked the first three phases of the patient revolution. As the AI-first approach is gaining ground, it will now be important to unlock and "connect" all this data. You have to measure to know, but you have to share to interpret and understand. What's the value of information and data if not shared with and evaluated by other doctors, caregivers, or smart algorithms?

What data will really create value or accountability, if shared between patients, healthcare professionals and smart algorithms?

Currently, relevant medical information is stored in Electronic Health Records. Every patient has his own digital record which includes demographics, medical history, allergies, and laboratory test results. But even if the information would be properly coded (which at present is rarely the case), it is seldom shared with other healthcare professionals beyond a single discipline, hospital, region, country, or, most certainly, continent. The risk of not sharing data is that other healthcare providers don't dispose of the medical history of the patient. But it also makes it difficult to instil accountability across multiple stakeholders or towards the patient.

Within the healthcare system, we are starting to see some slow initiatives to connect different healthcare providers and allow them to share data. However, these health records are information documented during single visits, which is stored away from patients within the healthcare system. These records don't structurally capture the patient's reality between visits. How did symptoms evolve day by day? What was the opinion of the physiotherapist? Did the osteopath learn anything new? Did the patient eat/sleep/feel well? What did the patient do when he suddenly felt worse? There is little information from other stakeholders, like osteopaths, personal trainers, or dieticians, that is shared with or used by that physician (or vice versa). Over and above that, health records generally don't include patient-generated information (like activity, sleep, food intake, emotions), that are gathered via mobile tools or via wearables. With about 50% of people using their health and fitness apps more than once a week (Flurry 2018), this store of information cannot be underestimated. It can be very valuable, for instance, in lifestyle diseases. But while this general data is still left largely untapped, other valuable data from fairly new health services (such as DNA analysis, microbiome tests) is simply ignored. Different types of data are being generated everywhere, but current systems don't allow these to be easily connected. We are not yet fully in the fourth phase of the patient revolution. Even if patients are increasingly interested in actively managing their own health by capturing data (phase three of the patient revolution), this data isn't yet used by health professionals. It is never analysed, nor connected with other relevant information. Even if patients are looking for ways to have their health managed holistically within a multi-disciplinary team, doctors and other healthcare providers are not connected, nor trained to include this in the patient's anamnesis.

> *Early in 2019, **Apple** announced a beta version of its health app that will allow iPhone users to store and share their medical records from a range of healthcare systems in the US. This is an important step in solving the interoperability issues that plague the electronic health record data systems. In the future, the app could indeed evolve into allowing patients to add real-time data, such as exercise and sleep patterns, to their medical records. That would give care providers a much fuller picture of the patient's health, and help manage chronic illness, promote preventative medicine, and improve overall quality of care. It would also, to some degree, make it possible for patients to take the ownership of their health data back into their own hands. About a decade ago, both Google (**Google Health**) and Microsoft (**HealthVault**) launched a similar initiative that aimed to return ownership of health data to patients and hand them the power to share it between healthcare professionals. But Google stopped supporting the service when they introduced Google Fit. Microsoft announced that it would shut down all activities related to HealthVault by the end of 2019. It remains a very difficult setting to operate in. But with the growth in the quantity as well as the quality of health-related data outside the healthcare system, connecting all this data will be a natural evolution in health management.*

In a digital world in which all sorts of data can be captured, what data that currently is not being used would help patients in managing their disease as well as their life?

Connecting and interpreting all types of data might be a bridge too far today. But there are certainly some initiatives that are a step towards better connection with patients and that take more information into account than is gathered during sporadic visits to the doctor. This is extremely important as receiving healthcare as an individual is fundamentally a human process. That's why the importance of efficiently and effectively connecting with patients should not be underestimated. In an era of escalation in administration and relative decline in the number of healthcare professionals, time pressure is putting the personal interaction under stress. Telemedicine is one of the initiatives in early bloom that has the potential to make healthcare personal once more. While it has been present on the market for about 40 years, only now has it been able to gain some traction. Telemedicine is the delivery of remote clinical services using technology like online video conferencing and messaging. It is used mostly for intermediate consultations, diagnosis follow up, patient monitoring, and medical education for patients. It improves the availability of care as patients can connect with doctors anywhere and anytime.

> *A premium version of the previously mentioned **MySugr app** now also connects patients with diabetes educators via messaging and video conversations. This service provides great intermediate support between medical appointments and creates a more personal relationship between the physician and the patient. It improves the experience and the overall impact of diabetic care. **MediSafe** is also improving the user experience with support between medical appointments. By integrating with Health Records by Apple, it eases the import of medications directly into Medisafe – automatically and instantly – from institutions supporting Health Records on iPhone. Patients no longer have to manually add medications, which ensures correct warning in case of drug interactions. They also receive*

relevant push notifications related to medication intake. By being integrated in the Health app, physicians gather information that previously wasn't tracked between visits. ***BeterDichtbij*** *has launched a similar service in The Netherlands to simplify connections between any type of patient and healthcare provider. As patients leave the hospital while still recovering, BeterDichtbij assures patients that care is always nearby. People can reach out via the app to ask any relevant medical question, read lab results, or order a refill. Each conversation is also automatically filed in the Electronic Health Record of the respective patient, to assist doctors in capturing all relevant data. All of the above examples technically accomplish more and better connections between patients and caregivers. But most of all, they bring information to patients in their time of need, while facilitating impactful methods to coach patients in place of time-poor healthcare professionals. The connection actually establishes a deeper partnership.*

What two-way connections could you establish with your patients to partner with them in a very personal way?

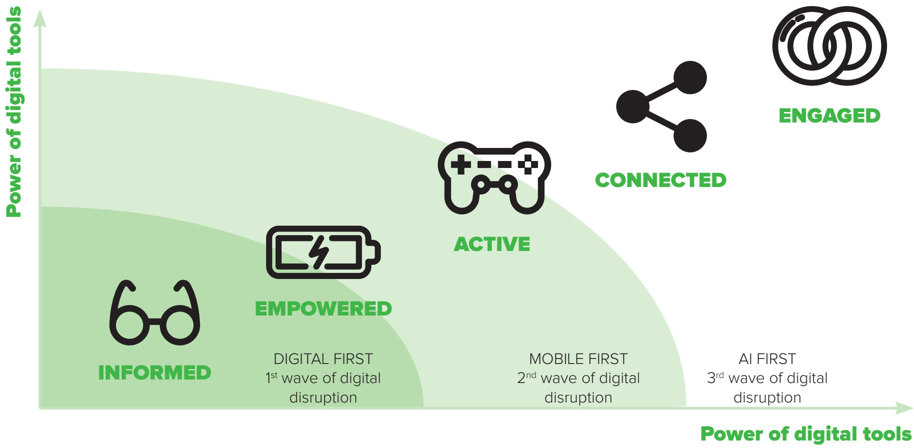
A perfect example of connecting is the ***All4cure*** *knowledge sharing platform, founded by Anthony Blau, a medical scientist and professor of haematology who diagnosed himself with myeloma in April 2015. To improve the prospects of cancer patients, Blau decided to set up a web portal for them. As the name suggests, All4cure features three interlocking communities – patients, myeloma experts and researchers – that collaborate to find a cure for now and for the future. It offers connections between all the parties. Patients can learn from one another as well as get in touch with experts for specific questions. Researchers can easily connect with caregivers as well as recruit patients for clinical trials with new experimental drugs. This knowledge platform is unique in that each patient has his tumour genetically sequenced. That information is shared online and used within the community to study the relationship between the impact of the medication and the specificities of the tumour. All will then decide on the best treatment for the individual case. This multi-way connection between*

> *all parties not only brings relevant stakeholders together, it also leverages the power of collaboration around data sharing.*

What existing (or future) tools and technologies can you exploit to set up collaborations between different stakeholders and truly help them to benefit from the involvement of all parties?

The Engaged Patient

While these examples show early initiatives of growing connections between diverse stakeholders and even different types of information, the reality today is that stakeholders are not easily reached, and information is prevented from being shared. Patients are looking for ways to have a bigger impact on their health, but they often lack the connections to bring data and information to gain more meaningful insights. The fourth phase of the patient revolution is only at the beginning of its venture.



PATIENT ENGAGEMENT = level of knowledge X power of digital tools

Patient engagement is the result of the level of knowledge multiplied by the power of digital tools. When a patient is sufficiently "informed" ahead to start a discussion with his caregiver, when a patient is "empowered" to reach out and find additional, more in-depth information about his condition, when a patient is leveraging mobile solutions and wearable devices to "actively manage" his health, when a patient is *"connected"* with all the different stakeholders to leverage all sources of data and information, *then* a patient has become truly "engaged" with his own health. While the fourth phase of this patient revolution is showing the very first signs of blooming, patients are currently in the midst of discovering the third phase of this patient revolution: they are increasingly active in managing their own health. Before we look at what portion of the patient population is sufficiently Healthusiastic to be empowered and activated now, let's ask ourselves:

What (1) knowledge are you unlocking and what (2) tools are you making available to service patients in their search for better engagement?

(Pro)active segments of the population

In previous chapters, we showed that both sexes in each generation are increasingly occupied with their health. Patients are also more active than ever before. Does this mean that literally everyone is following this Healthusiasm trend? Not exactly. Although there are signs that even the least health-conscious people are somewhat more aware of their actions than a couple of decades ago, they can hardly be seen as actively managing their health. This chapter will summarise the conclusions from segmentation studies that actually quantify the current Healthusiasm trend.

Patients managing diseases

In their Rising Consumerism report (2015), Deloitte did an interesting analysis. The objective of the segmentation was to help companies to address consumerism in the healthcare and health insurance industries. This consumerism is typified by patients who increasingly change doctors, request a second opinion more often, are looking for alternative treatment options and are paying for health solutions out of their own pocket. As these patients take on more responsibility, they also become more demanding towards healthcare providers. These changing expectations require healthcare organisations to become more customer- or patient-centric. Organisations need to better understand the consumer's attitudes and behaviours in order to address their expectations as best they can. This becomes even more important because new entrants are flooding the health industry with customer-focused technological innovations, convenient solutions, and even scientific discoveries.

While the Deloitte report primarily focused on consumerism in the healthcare and health insurance industry, it does contain some valuable insights that help to assess the size of the segments of people that are actively managing their health or illness. Deloitte has identified two categories – passive and active – and six unique consumer health segments that navigate the healthcare system in very different ways. A discussion of each of the segments identified is beyond the scope of this book, but the active-passive distinction is worth mentioning. Around half of the population falls into the passive category, either simply following the recommendations of healthcare providers without many questions or are not engaged with their health at all. The other half of the population actively manages their health by looking for alternatives, more information, and additional expertise and opinions. From this description, this "active" category could be considered the most receptive to the Healthusiasm trend. However, the limitation of this Deloitte report is that it was focused mainly on patients in relation to their healthcare provider or health insurance company. A second segmentation study will further elaborate on behaviour towards personal health management in general.

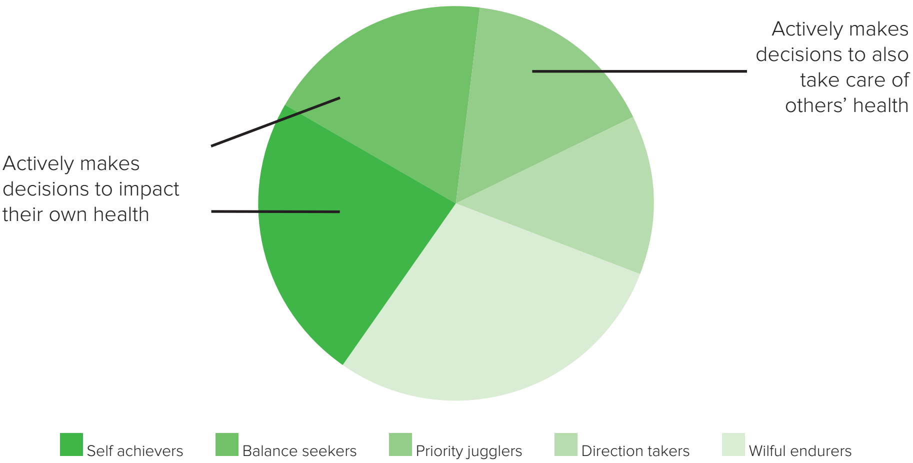
Patients managing personal health

In 2011, InSites Consulting conducted a global health behaviour segmentation study with Across Health, a Belgian omnichannel customer engagement consultancy firm. The online survey was conducted among 6 000 patients from 14 different countries. It investigated their attitudes and (online) behaviour, going beyond the relationship with an illness or a caregiver to their personal health management in its entirety. Deloitte had found that the active and passive categories were similar in size and this study confirmed it.

About half of the population is actively managing their health. This active category leads a healthy lifestyle, believes in prevention, and is focused on combining healthy food with exercising. When they are ill, they are highly involved in their health management, asking their healthcare providers about it, as well as actively collecting information themselves. Though this study focused on a broader aspect of personal health management, it reached the same conclusion: half of the patient population is receptive to the Healthusiasm trend. Whether this conclusion also goes for health consumers in general will be demonstrated by the next study.

People managing a healthy lifestyle

A third interesting segmentation study was recently conducted by c2bSolutions, a company started by two former marketing managers at P&G's healthcare division. With their extensive expertise on consumer perceptions and behaviours with regard to health and wellness, their mission is to help organisations and brands to develop products and services based on the needs, motivations and attitudes of health consumers. Their psychographic segmentation research (2017) reports that two consumer segments that take up almost half of the population are the most proactive towards their own health and wellness. A third segment was even proactive towards the health management of others. But the study also showed that even less (pro)active segments are taking action to impact their health to some degree. For example, the research revealed that a staggering 70% of all respondents were actively taking steps to prevent illnesses. In fact, only about 17% of the population admitted to having a rather unhealthy lifestyle and had no intention of changing it.



Psychographic segmentation research (2017) by c2b Solutions (2017)

Health conscious people

Regardless of whether the segmentation study was about patients managing diseases, patients managing their own health, or people managing a healthy lifestyle, each study showed that about half of each of these populations are most inclined to fit the behaviours strongly linked to the Healthusiasm trend. But while this is already a considerable proportion, it became obvious that even the other half is more health conscious than before.

Are you offering half of your customers the possibility to take health-impacting decisions?

The Healthusiastic decision

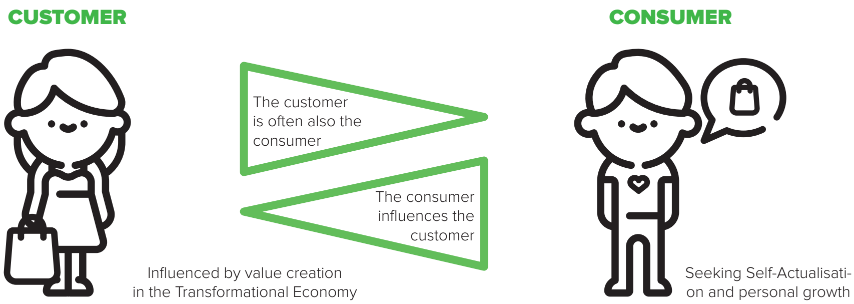
"You are what you eat" is not a new concept. And we know that in essence it is true. If you eat well, you are much more likely to be healthy. If you prefer junk food over fresh vegetables, then you are less likely to be healthy. It is as simple as that. It's just a matter of making the right food choices. Researchers at Cornell University estimated that we make on average 226.7 micro-decisions each day on food alone. Of course, personal food choices are not the only Healthusiastic decisions we make. Our decisions influence our health far beyond the scope of food choices. In fact, it's estimated that the average person makes about 35 000 micro-decisions each day. Of course, many of those decisions aren't conscious. But becoming healthy and happy starts with a multitude of smaller daily decisions: what to eat, how much to sleep, how much exercise to get, and so on. In combination, these micro-decisions can have a very significant impact on our health indeed. Who you are today is a result of your decisions. It starts with us. No matter how we feel in a certain moment, health and happiness are simply byproducts of good decisions.

In making decisions that impact their health and happiness, people are either eagerly anticipating an improvement or anxious to eliminate a negative element of their lives. Customers are generally excited about their decisions. They look forward to receiving something. About 85% of the time, people make decisions as consumers or as customers. But in 15% of the situations, people make decisions as patients, and generally made in an anxious state, when they are looking for immediate relief. This chapter takes a look at the different decisions people make as a patient or as a customer. It also explains what types of new decisions people make as customers or patients in the light of the Healthusiasm trend.

When customers make decisions

Because the words customer and consumer are used interchangeably, it's important to understand the difference as well as the dynamic between both actors. But it will help to understand why the word "customer" is generally used within this book. Theoretically speaking, customers refers to persons who buy goods and pay for them. Consumers are the ones who consume or use the goods. Both words are commonly confused with one another. Depending on the specificities of their business, brands and organisations could be focusing on the customer and the consumer, as both might have an impact on their business.

> *A retailer buying milk to resell it is a customer, a person buying milk is a customer, a person drinking milk is a consumer. Of course, the person who is buying might also be drinking the milk himself, making the customer the consumer at the same time. Milk brands might communicate the health benefits of drinking milk daily to convince the mother (the customer) concerned about the health and well-being of her child (the consumer). But milk brands might be branding the milk in such a way that the child influences his/her mum, as cereal brands do. The mother is the customer who looks at the return she might receive for a certain amount of money. Her decision is generally made either at the time of the purchase or "investigated online" prior to going to the store.*



Customers are the king of the decisions. Typically, they have the freedom to choose from a generally broad range of options that each have a clear cost attached. With plenty of information at hand, they make their decision based on a cost-benefit evaluation. In case of a repurchase, this evaluation can be based on their own experience or that of the consumer. But in the Experience and Transformational Economy, experiences are becoming so personal that the customers will be the consumers of the transformation themselves. The customer will make the purchase with the (personal) transformational experience in mind.

> *The motivating experience of SoulCycle training allowed the company to offer a pay-per-class system. This system in itself builds no loyalty to SoulCycle. There is even the risk of the loss of the customer after each session. But offering the consumer such a relevant experience establishes a more genuine loyalty. It also allows SoulCycle to offer the customer the experience of flexibility. SoulCycle does not need any membership. After each session, the relevant "consumer" experience ensures the purchasing decision by the customer (who is generally the same person).*

Customers also have the freedom to decide not to purchase anything at all. But if they do decide to add a product, a service or an experience to their life, they expect it to come with excitement and an immediate benefit. In case they are not satisfied, there is an after sales service to help them. These are the specifics of customer decisions.

For the purposes of this book I tend to go along with the semantic, intuitive interpretation of both words. A **consumer** typically "consumes" the product. A **customer** is someone you might want to build a personal relationship or share an experience with, or someone to whom you could offer a transformation.

Is it still valuable to distinguish between your customers and consumers? Or does the experience or transformation you are offering make it redundant because each person purchases and consumes?

For these simple reasons, I prefer to refer to customers rather than consumers when discussing Healthusiasm. The customer is the one who will make the decision (to become healthy and happy). He or she is also more of a real person with whom you can personally connect, which is critical in the context of self-actualisation. But the customer is also the consumer of the experience in today's experience and transformational economy. That's why the word "customer" is chosen for the subtitle of this book: Making customers healthy & happy. Customers in this book refers to shoppers, drivers, guests, visitors, travelers, patients and anybody else who takes decisions. The fact that the word consumer is often debated within the healthcare industry (as healthcare is not 'consumed') is also a good reason to stick to the word customer. In the next section will be explained how archetypical patient decisions are indeed entirely different than traditional customer decisions. But we will highlight how even patients have more freedom of choice to impact their health nowadays.

The archetypical patient decisions

One of the most notable changes in the current healthcare landscape revolves around the growing involvement of patients in their health management and care. They have become so engaged and informed that the industry is beginning to refer to them as consumers. Many will argue that the two aren't synonyms, and that the labels aren't interchangeable. Even when patients are more informed and engaged, they don't make the decisions in the same way as a consumer or even a customer.

But patients do also make decisions, of course. At the very least, they should be involved in the decision making by their healthcare providers – even though those decisions may be difficult. But patient choices are typically limited and related information (such as cost) is often lacking. The result of their decision might also be unclear because it remains hard to objectively characterise care as good or bad. However, patients could find themselves in situations where they have no option but to make a decision, because they want "to get rid of something". Obviously, these decisions bring a lot of anxiety, and they don't really come with "customer service" to sort out any issues afterwards.

	Situations in which a person is a	
	CUSTOMER	**PATIENT**
Archetypical decision	Lifestyle decision	Medical decision
Pressure	Freedom of choice	Must decide
Dominant feeling	Excitement	Anxiety
Number of options	Broad range	Few (if any)
Available information	Real time & transparent	Very little
Outcome	Immediate benefit	Unclear
After 'sales' service	Helpful	Limited to none

The above description can be considered typical for a patient who has to make a medical decision. The situation is entirely different when customers make lifestyle decisions (see table). As a result, many argue that patients should not be considered to be customers or consumers. That is still largely true for the typical "medical" decisions in which patients are involved. But patients do also have the option of making other decisions that impact their health. After all, looking after your general health becomes even more important when you have been diagnosed with a long-term disease. That's when people are most motivated to make an impact on their own body and mind. Maintaining overall health could help them to continue to do the things they enjoy, as well as the things they need to do. Those patients will indeed make decisions to actively impact their health. And for these decisions, patients will have more options, more information, more freedom and better service.

Diabetes has long been considered a 'lifestyle' disease that benefits from decisions like dietary change and regular exercise. But can't this be said of all chronic diseases? Patients with cancer, Crohn's disease, chronic pain, and osteoporosis could all benefit from these types of decisions, couldn't they? So too, Alzheimer's and arthritis patients, or any others with chronic conditions. Even patients with acute conditions are increasingly looking for ways to actively influence the consequences of their illness or the illness itself. These choices help patients to actively impact their health and happiness.

While many of these diseases aren't treated as lifestyle diseases by the healthcare system, and as several of those choices are not (supposed to be) offered by the healthcare institutions, patients turn to other types of brands and companies for help in making these types of impactful, Healthusiastic decisions.

The types of Healthusiastic decisions

Regardless of whether we find ourselves in a situation as a patient or a customer, we can make different Healthusiastic decisions ranging from very targeted medical decisions in which we are involved, to broad lifestyle-related options from which we can choose. Let's go through each of the four types of decisions.

Medical decisions

When thinking about Healthusiastic decisions, medical decisions might be the first type that comes to mind. When we are "managing a disease", or when we are starting to deal with one, we are making medical decisions – or, at least we should be, if our healthcare provider involves us. These decisions are typically options that are part of the healthcare system and require endorsement by a doctor. For the most part, they include medication intake and surgical procedures related to a specific (future) disease. Generally speaking, they are taken by a small proportion of the population.

Health decisions

Health decisions focus on disease prevention, so they are made more frequently than medical decisions. But health decisions also involve our physical and mental health. They are also made on the basis of some (publicly known) scientific facts. But instead of disease management, the objective here is to "prevent our physical and emotional health worsening". Most of these health decisions don't require the support of a doctor, but doctors are now recommending them more often than in the past. Actors in the healthcare industry often refer to this as the increased focus on wellness by healthcare providers.

Health decisions is about the active approach of cultivating awareness and taking decisions that prevent our health from declining. Smoking cessation, for example, is a typical health decision. It is publicly known that smoking damages health and that quitting can prevent your health from worsening. Smokers generally make this decision themselves, although a doctor might strongly recommend it. Other examples of health decisions are when an obese person decides to lose weight, or when someone starts running to keep their heart fit.

Well-being decisions

A person's well-being is often described as their current state of health and happiness. Well-being decisions are taken to "maintain that state". The impact of these decisions goes beyond physical or mental health. Instead, it's about feeling good. They might be based on (some form of) scientific fact, but they are often rooted mostly in beliefs. It's about achieving a quality of life that encompasses happiness, health, social connection and life purpose.

Well-being is an outcome that appeals to almost the entire population. These decisions are therefore common: people go to a sauna to feel better. Work-life balance prevents burnout. Going to bed early will make you feel less exhausted the next day. A recent study by the mindful drinking movement called Club Soda for example showed that 52% of people cut down on alcohol to improve health. A well-being decision doesn't necessarily require a recommendation from a healthcare professional. Even without a recommendation to exercise, people do so for their own quality of life and well-being. It makes them feel happy and healthy, and offers purpose (run that marathon, win the championship), and social interaction with friends.

Lifestyle decisions

The most common decisions are the ones we make every day about the way we want to live. Lifestyle decisions are about the things we usually do or choose to do. They typify our individual attitudes, interests, values, or our views on politics, religion, health, intimacy, and more. Lifestyle decisions differ from well-being decisions in that they don't focus first on feeling good mentally and physically. Lifestyle decisions are about "the style of living we desire". They are about our status, our thoughts, and our related actions. It's much more about how these decisions make up our own identity than how they impact our body or mind. We decide on the work we want to do, the type of travel we prefer, the speed at which we adopt technology, the type of relationship we want to have with friends and family, and "the clothes that make the man". Activewear is a good example of establishing a sporty and healthy lifestyle or identity.

Lifestyle is the most visible manifestation of our social difference. A large part of it is directly built by conspicuous consumption of the elements that fit the social position we decide to adopt and the recognition we desire. For example, we can buy legumes at the exclusive organic store, we can buy a salad at the retailer focused on discounts, or we can grow the vegetables ourselves. Each of these customer decisions can create or affirm our desired lifestyle. But another important part of our lifestyle is indirectly determined by our education, our income and the environment in which we are born, grow, live, work and age. These social determinants play an important role in the everyday Healthusiastic decisions that people (can) take. Therefore, lifestyle decisions are mainly a combination of who we want to be and what we are able to do. But these decisions certainly impact our health.

THE DIFFERENT HEALTHUSIASTIC DECISIONS AND THEIR DESIRED OUTCOME

DECISIONS	OBJECTIVE	DECISION BASED ON	DESIRED OUTCOME	POPULATION	EXAMPLE
Medical decisions	Manage illness	Clinical studies & HCP decisions	Impact on the medical condition	Small & targeted	*Medication*
Health decisions	Prevent health from becoming worse	(Publically known) scientific facts	Good mental & physical health	Half of the population	*Smoking cessation*
Well-being decisions	Maintain health & happiness	Beliefs & assumptions	Great feeling of mind and body	Majority of the population	*Sauna*
Lifestyle decisions	Establish identity	Desired identity & social determinants	Style of living	The entire population	*Activewear*

People make many Healthusiastic decisions in any given day. As a customer, they traditionally make lifestyle decisions that determine their way of life and establish their identity. As a patient, they are typically involved in medical decisions that determine the impact of their disease. As explained above, the decisions that are taken in these two stereotypical situations couldn't be further from one another. But from the descriptions of the different Healthusiastic decisions, it should be obvious that people take several decisions that impact their health, regardless of whether they are in the situation of patient or customer.

MEASURES PEOPLE TAKE TO MAINTAIN THEIR PHYSICAL HEALTH

Enough sleep

66%

Healthy food

59%

Exercise

57%

Source: Survey among more than 28 000 consumers in 23 countries.
Which of these activities do you do regularly to maintain your physical health?

A study conducted by GfK in 23 countries (2015), showed no surprises when people were asked about the activities they engaged in to actively manage their health: getting enough sleep is the most frequently answered activity, followed by healthy eating and exercising. Each of these activities was mentioned by the majority of the respondents, confirming once again that over half of the population is actively taking care of their own health. However, it's important to understand that these activities can be the result of any type of Healthusiastic decision. Some healthy foods can be a lifestyle decision that establishes a certain identity. Others can make you feel good or bring proven benefits to your physical health. Clinical studies are even reporting that food affects our genes, so food choices now become part of a medical decision as well. Eating healthy food certainly is a Healthusiastic decision. So too, getting enough sleep and exercising. But they are Healthusiastic decisions that can be made with different objectives. It's important to set and answer the appropriate expectations for your customers. For example, even though organic food was launched mainly for environmental reasons, customers more often buy it with their own health in mind. But even then, these reasons can be driven by a desire to confirm their image of health-consciousness with products that are considered healthy, to feel great physically because they are organic, or to prevent their health from worsening because they know that pesticides will impact their health.

If your brand is bringing a health product, service or experience to your customer, what type of outcome(s) are they really expecting?

Establishing a health-conscious identity

Owning the most expensive or the latest goods has taken a back seat to looking good and healthy. Living healthily has become the status that customers desire more than material goods, which is why people are making more and more lifestyle decisions to live healthily. In a time that is dominated by cataloguing our lives on social media, looking good and healthy are the new luxuries that consumers want to enjoy and flaunt.

> *Open your Instagram feed to discover the 1.2 million pretentiously well-framed #avocadotoast pictures and you'll know what I'm talking about. These pictures are supposedly shot in one of the many new-places-to-be that serve only avocados. But the photos could just as well be taken in a hipster coffee bar, carefully curated at home or proudly made at work. Avocados may have been around for about 10 000 years. Today they are sold more often than oranges, even though they cost four times as much. As they are seen as very healthy (although most customers don't really know exactly why), people are willing to pay the price.*

This willingness to pay is high for many "healthy" products, for example, for organic food. Research from data company IRI found that sales of no-antibiotics-ever meat grew 45% between 2016 and 2017, even though a typical food basket that includes organic or antibiotic-free meat is 40% more expensive than its non-organic alternative. This preference for natural products is also manifest in the decision on skincare products and deodorants. People decide to buy these and many other "healthy" products to create or confirm their image as a health-conscious person, which is greatly desired today.

How can your products, service or experience rightfully strengthen the health-conscious image of customers?

Even when suffering from a life-altering disease, patients want to live life as normally as possible. Going to work, continuing studies, meeting with friends, performing household tasks or travelling the world might all be things a chronic patient does not want to abandon. After all, staying active is very important for your own identity and personality. Patients take an enormous number of "lifestyle decisions" to optimise living with their disease or to maintain their identity and personality. They can do more shopping online, sit down to do the ironing or bulk cook items on a good day. They may plan ahead more often, to avoid sudden stress, decide to ask family and friends to lend a hand in the house, employ a gardener or a cleaner, or have the groceries delivered. If some desirable trendy products no longer fit their 'adapted' life, they might look for other ways to establish their identity. Each of these many Healthusiastic decisions will define their way of living with the disease, maintain their identity, and indirectly impact their health or happiness.

Feeling great in mind and body

Well-being is all about feeling good in body and mind. People now are looking for ways that help them feel good. Even though certain healthy lifestyle decisions may upgrade your health-conscious image, they do not make you feel intrinsically good. Feeling good in body and mind is not about your identity or the things you own. It's rather a state of health and happiness that you want to maintain.

One of the greatest threats to maintaining this state is stress. While stress was necessary for survival, modern security and luxuries have often rendered these fight-or-flight responses obsolete. We now experience stress as unnecessary or detrimental to our health and happiness, certainly when it persists after the external trigger has passed. That's why many well-being decisions have the objective of stress management. Work-life balance is a very good example of how people take well-being decisions to feel better. As our lives are characterised by 24/7 connection, a lack of work-life boundaries, and living in urban nature-deprived areas, people are looking for ways to feel good mentally and physically. They focus on time management techniques, decide to work from home or organise their day differently. People even expect their employers to recognise these needs by implementing corporate well-being programmes that facilitate this.

The increased importance of well-being decisions is also visible in the immense popularity of meditation, which could justifiably be labelled as the most popular health trend. Meditation is now as beloved as yoga, reaching about 15% of the population, but is growing much faster. A recent study from the Centres for Disease Control and Prevention (CDC) in the US, reported that meditation grew 250% between the years 2012 and 2017, while yoga "only" grew 50%.

> *The sleep, meditation and relaxation app Calm is a good example of that popularity. With about 40 million downloads in only a couple of years, it became the app of 2017 and remains the top grossing health app in app stores today. Calm is also the first mental health company ever to reach the status of unicorn (a company valued at one billion dollars). The popularity of running, sleep and food apps falls under the same category of*

> *tools that help people to feel good. The abundant availability of tracking, information and management tools helps people make conscious decisions about exercising, sleeping and eating, which they believe will impact the way they feel.*

Patients also just want to 'feel' good in body and mind. We know that life does not have a fixed path. Significant events or changes will inevitably occur and bring uncertainty. Patients are even more aware of this reality. Sudden events and uncertainties are part of the progression of disease and patients are often confronted with a range of emotions related to the impact of the (new) symptoms on themselves, their family and their future. Patients typically suffer from a great deal of stress. Talking about their emotions can therefore be a very important well-being decision for them. Even at work, patients might have to discuss their career path or decide on the time they need to optimise their work situation to their reality. These "well-being decisions" are some typical Healthusiastic decisions that help patients feel better.

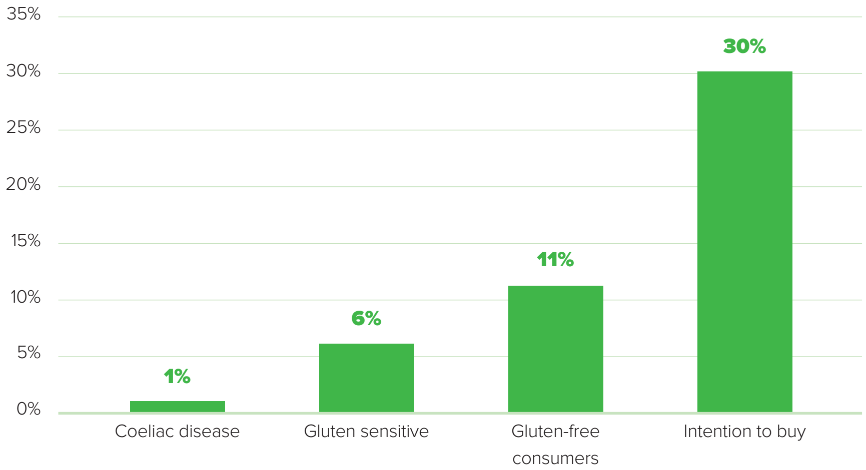
Preventing health from declining

Some decisions go beyond feeling good. These decisions are taken to achieve a clear impact on physical or mental health. People generally make health decisions because they don't want their health to worsen. Often, they even expect these decisions to have a positive impact on their health, just as smoking cessation prevents a decline in health or shortness of breath. But there are plenty of other health choices that confirm that people are interested in impacting their physical or mental health. With the increased knowledge and conviction of the impact food has on health, we certainly see more people making health decisions about what they eat.

> *When shopping or eating out with friends, you must surely have noticed how "gluten-free" has invaded our lives in the past 10 years. Gluten is a type of protein found in grains including wheat, barley, spelt and rye. Although diagnosis is rather complex, it is assumed that about 1% of the population is suffering from a gluten allergy (Coeliac disease), according to the Beyond Celiac organisation. It is a physical condition that irritates your gut. Next to gluten allergy, it's estimated that 6% of the population suffers from gluten intolerances and sensitivities that might cause similar symptoms, like diarrhoea, constipation or fatigue. This awareness has resulted in many self-diagnosing gluten intolerances and therefore buying gluten-free prod-*

ucts. Today, Nielsen found that 11% of households buy gluten-free products, while roughly 30% of the public would like to cut back on the amount of gluten they are eating, according to market research by the NPD Group. The market for gluten-free products has grown by 50% in the past three years. People are consciously making decisions to impact their health even though there is no medical diagnosis to back up this decision. But the scientific facts about how gluten could impact health are enough for many to decide to live by that diet, even if other scientific facts claim that there is no need, or that they should proceed with caution.

PERCENTAGE OF THE POPULATION INTERESTED IN GLUTEN-FREE



Although brands should carefully consider moving into a largely science-based field, which of your products or services can be optimised in the light of new (scientific and behavioural) insights?

Healthcare professionals might certainly recommend that patients eat healthily. Together with avoiding alcohol, smoking cessation, and regular exercises, these recommendations are probably the most common. But they remain a conscious decision by the patient. If they are focused on safeguarding their physical and mental health, they should be motivated to follow up on these recommendations. These Health decisions lower the chances of acquiring co-morbidities and can also reduce the impact of some specific symptoms, such as pain and fatigue. And people are actively looking for that. The search for alternative treatments is also considered to be a measure to prevent their health from declining.

The popularity of Health decisions is obvious when strolling around in supermarkets. Claims like low cholesterol, gluten-free, high-protein, or fat-free are widespread – on any type of food. These claims vary with some focusing on the impact on health or body, and some on the nutrient content. This is in an attempt to "scale up" products from being subjective choices to Lifestyle decisions that reinforce the identity of the customer, to Health decisions that actually claim a health benefit. This guides customers in their purchases. Studies show that health claims on food packages can be convincing enough for customers to skip the nutrition facts (ingredient labels). Some products don't put claims on the packaging but create an (often false) image of healthfulness instead. Drinking 'vitamin water' may feel like a Health decision (based on the image it radiates) but is misleading to the customer if it contains high quantities of sugar.

This type of health promotion is called Healthwashing. The term describes the practice of presenting and advertising products and services as healthy when, in reality, the customer is being misled. The prevalence of healthwashing has prompted the FDA and EMEA to regulate health claims on food. But meanwhile even products like mattresses, shoes or air-conditioners are increasingly promoted with health claims. Today, it's not uncommon to see lawsuits filed against companies that make false health claims in promoting their products. Some companies go to great lengths to appeal to customers with health claims, which just goes to show that Health decisions are becoming increasingly important for customers.

Managing a (future) illness

On diagnosis, treatment of the condition is required to prevent the disease from progressing too fast. Reimbursement criteria, the cost of the medication, clinical evidence and experience of the available treatments are factors that influence the treatment options the healthcare professional suggests. As a chronic disease has a profound impact on the patient, in most cases, doctors discuss the options directly with them, to discover their preferences. How does the patient live and work? What type of medication administration might best fit their personality? What are the most common symptoms? In this way, doctors directly involve their patients in these medical decisions. With acute illnesses, treatment decisions are also more often than not discussed between the doctor and the patient. This involvement is really what patients require. Because patients want to feel like tmey themselves have an impact on their own health.

For customers, Medical decisions is about "managing" future medical conditions. People are not yet considered patients and there is generally no medical professional involved in the decisions. These decisions are powered by rather new technology and science that, for example, allows you to monitor your health via frequent blood analyses or even to predict future conditions via genome sequencing. Monthly blood analysis, ordered without medical prescription, helps customers understand the evolution of their health in key areas by tracking dozens of health markers. Through medical feedback, people then learn the status of their kidneys, liver, thyroid gland, and cardiovascular system among others. DNA sequencing of genes (often called DNA tests) or analysis of the bacteria from the gut, nose, mouth, skin or genitals (often called microbiome tests) are increasingly popular medical decisions. What once cost a million euros and took 13 years to get results, now costs EUR 100 and takes about an hour. But commercially speaking, we are at the beginning of this mega revolution. Both "tests" have the potential to provide customers with very valuable information on their health in the very near future.

> *At the end of 2018, the personal genetic service **23andMe** became the FDA approved direct-to-consumer DNA test for detecting genetic variants that may be associated with medication metabolism. In order words, this test helps understand what role, if any, genetics plays in a person's reaction to drugs (pharmacogenetics). The approval of this pharmacogenetics test is a step forward in making information about genetic variants available directly to consumers. It will improve discussions with healthcare providers about what medication to take and how much. Early in 2019, 23andMe also received approval to offer customers a test for two genetic variants of hereditary colorectal cancer syndromes. It's the second test associated with cancer risk for which 23andMe has received FDA clearance, after receiving approval for three genetic variants associated with*

> *increased risk of breast cancer. Although both screenings rule out only a minority of the breast and colorectal cancers, it does offer a clear sign of where this is heading. And customers are eager to conduct these tests. At the start of 2019, nine million people had already conducted a DNA test with 23andMe, according to* MIT Technology Review *(2019). It displayed a growth of no less than 300% compared to the previous year. None of the other market dominant DNA tests, which offer only ancestry analysis, show similar growth.*

Most tests will be sold as a view on the potential 'risk' for multiple diseases, influenced by either genes, microbes and/or daily habits like food intake. They help people to better understand their own body. What are my risks for certain diseases? What vitamins or minerals are either elevated or reduced in my body? How does my body react to alcohol, gluten or lactose, for example? What is my risk for sports-related injuries? What is my pain sensitivity? Will I go grey early? What food should I be eating to optimise the functioning of my body? These are all questions people would like answers to. The latter, often called Food as Medicine, is rapidly becoming popular. It's the science of the influence of food on how our genes behave (nutrigenomics) and of the different ways our genes 'use' certain foods (nutrigenetics).

> *One of the world's largest food companies, which brought us Nesquik, Nestea and Smarties, is now poised to bring us personalised nutrition. In reaction to the popularity of health decisions that came with a lower demand for sugary treats, by 2018 it had already sold off its US candy unit and spent billions to acquire the dietary supplement maker* ***Atrium Innovations*** *and* ***Novartis Medical Nutrition****.* ***Nestlé*** *is on a mission to address health problems that are associated with food and nutrition. The Nestlé Institute of Health Sciences has invested a lot in medical research to develop tools to analyse and measure people's nutrient levels. In Japan, Nestlé has now rolled out a programme in which 100 000 people collect their DNA at home to receive recommendations on dietary changes. The recommended specialised supplements can be sprinkled on or mixed into a variety of food products, including teas.* ***Campbell Soup Co****. bought San Francisco-based start-up Habit, which uses DNA to make diet recommendations, offer nutritional coaching and recommend tailored meal-kits. As people are increasingly interested in making medical decisions, it's expected that all food companies will follow suit. In fact, Mintel (2019)*

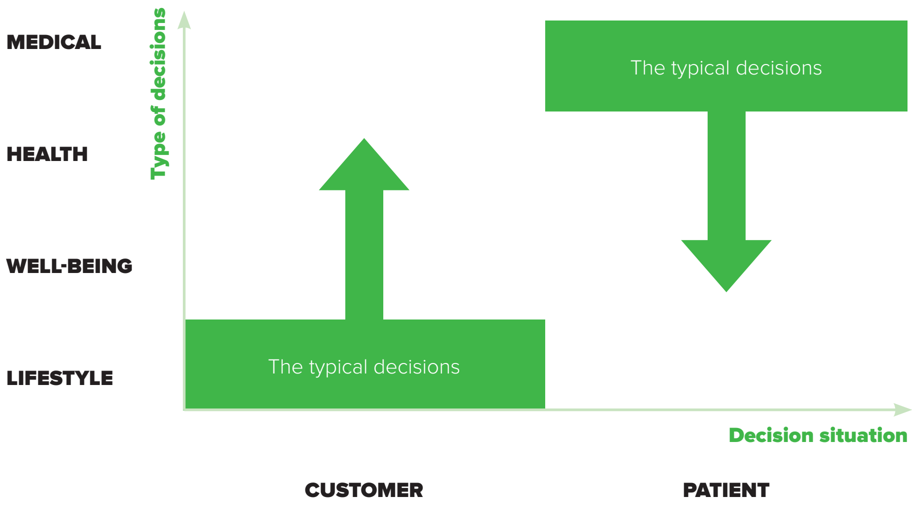
> *reported that already today, 42% of British consumers are interested in a personalised diet based on their genes/DNA.*

Customers make the medical decision to learn about their body even when they are not sick. They want to know what type of food to eat, sports to participate in, or beauty products to use to impact their health. Customers seem to have an appetite for these types of insights, even while the tests are only at the initial phase of their journey and based only minimally on science. But in future, these types of medical decisions taken by customers will be the norm.

> *It's not only the food industry that will benefit from the affordability and accessibility of genome sequencing. British skincare brand* ***Geneu*** *offers customers at Selfridges a same-day DNA testing service as part of its Personalised Serums package. But in today's day and age, you don't need to go to London, of course. There are many more e-commerce sites run by dermatologists that sell similar DNA-based skincare products. Even* ***L'Oreal*** *is jumping onto the DNA-personalised skincare band wagon. Athletes and sporty people can also benefit from DNA-personalised training.* ***38 Degrees North*** *holds fitness boot camps in Ibiza, based on a DNA test people need to send three weeks prior to the training. The five-day training and dietary schedule is then personalised to your DNA to achieve maximum impact. Perhaps you are a wine lover? Then* ***Vinome*** *can create wines that are perfectly suited to your DNA-personal palate. From 2020, sushi fans can book a table at* ***The Sushi Singularity Tokyo*** *restaurant. After having booked a table, the restaurant will then mail a health kit that asks for a DNA sample, urinalysis and enterobacterial flora examination. With the results, the customer will be served enhanced meals based on your DNA Health ID.*

People make plenty of decisions every day. Whether we find ourselves in the situation of patient or customer, more and more people are making Healthusiastic decisions. Patients make Health decisions and even Lifestyle decisions. Customers make Well-being decisions and even Medical decisions. About half of the population, regardless of age and gender, is making decisions to actively impact their health in some way. This is a trend that is becoming visible everywhere around us. The following chapters explain how you should understand and react to this trend.

HEALTHUSIASM MODEL



The Healthusiasm Trend

About 150 years ago, men wore tailored suits with a bow tie, pocket watch and handkerchief. Going out, men topped this off with a waistcoat, hat, and gloves. Women wore skirts, dresses and gowns that had many layers of fabric. These could be silk or satin but were mostly very uncomfortable. A corset was worn underneath to maintain a narrow waistline. These clothes were not pleasant to wear, but people went to great lengths *not to look poor*.

Ever since, clothes have become much more comfortable and casual. Bit by bit, even sports clothing took up room in wardrobes. Bruce Lee was one of the first to bring the classic tracksuit into mainstream '70s fashion, even for activities that were not remotely active. Run DMC made the classic Adidas shoe trendy in the '80s. Nike Air Max was identified with a specific subculture in the '90s. And of course there are many more examples of how specific sport clothes have suddenly been appropriated for everyday use.

But in the past three years, activewear has become everyday wear. In a time where people want to actively manage their health and happiness, activewear demonstrates how health and well-being are truly ingrained in our daily routines. You'll see women walking the streets in yoga wear, middle-aged men wearing jogging pants, or grandmothers rocking Nikes. Being the healthiest and happiest version of yourself also means not becoming inactive as you grow older. What better way to prove that 60 is the new 40, or 40 is the new 20 than to wear sports clothing? In contrast to 150 years ago, you can say that people go to great lengths today *not to look old*.

1870
I hope I don't look **POOR**

2019
I hope I don't look **OLD**

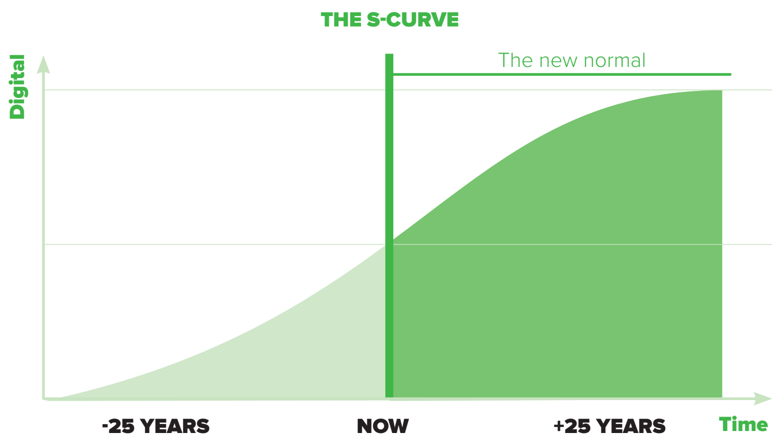
Trends and S-curves

There was a time when whitening teeth, smoothing cellulite and battling ageing with health treatments was kept secret. Today, the pursuit of health is the new status symbol much as it was the Céline bag five years ago. There was a time when taking a photo at the gym was considered inappropriate, but now Instagram feeds contain plenty of selfies of people working out. Our Instagram is in fact the digital proof of our healthy identity. Today, it's basically the only acceptable lifestyle brag. No longer is bragging about a car or the money you make the thing to do. The recognisable sweater from the personal training centre, the geometrical designs on activewear or the green smoothie in hand might be the most desirable look today. It is a display of self-care, discipline, and responsibility. For some, healthy living might even give a sense of moral superiority.

The S-curve

But don't make the faulty assumption that Healthusiasm is only about the aforementioned desirable 'image' of healthy living, or that this fashionable profiling is the sole driving force behind Healthusiasm. That would imply that it will disappear as quickly as the desire for a Céline bag, waist-high trousers or colour-block combinations. That is not the case. Healthusiasm is a Macro trend that has been around for several years and is bound to be here in the long term. It's important to understand that Macro trends are global trends that gradually permeate our world. Initially they are rather imperceptible. Their slow growth means that we are influenced unconsciously, until we consider them normal. It's often only after a couple of years that we realise that the values and aspirations of society have changed. That's also why Macro trends always get a lukewarm reception.

The impact of Macro trends is often overlooked at first. Many miss these critical changes in society. Peter Hinssen, one of the most sought-after thought leaders on radical innovation, leadership and the impact of all things digital, carefully explains this in his first book, *The New Normal*, by illustrating it with the dynamic of S-curves. As you might have learned from Hinssen, an S-curve has a turning point (see below). At this point in the curve, change is accelerating at its fastest pace and becomes normal. For example, Hinssen explained that as from this turning point onward, digital became the new normal in our society. It was a Macro trend that was largely ignored in the past, that "suddenly" had become unavoidable and indispensable.



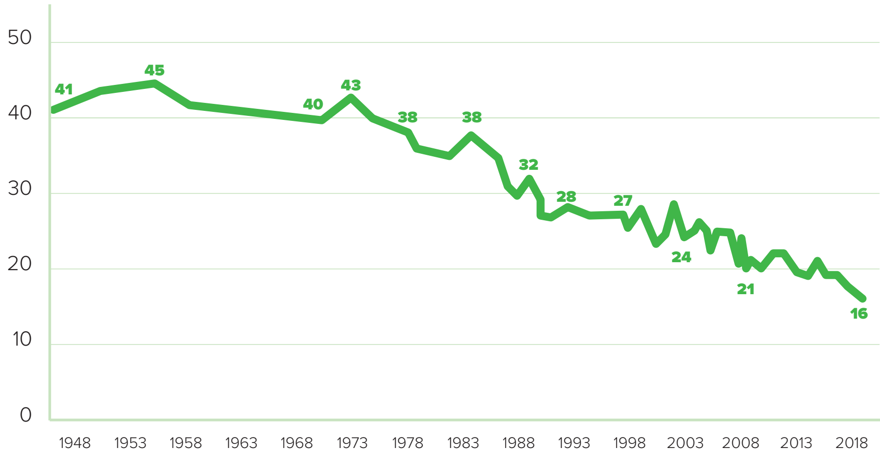
The digital S-curve by Peter Hinssen showing that Digital is the New Normal.
Visit www.nexxworks.com to learn how this company inspires organisations to act on the Day After Tomorrow.

Healthusiasm is at a similar turning point on its own S-curve. But I believe that the Healthusiasm S-curve has a slightly atypical form because it starts from the very basic, ever-present need of being in good health. People have always been preoccupied with their health. Ancient Greeks brought offers to Apollo and Asclepius, while in medieval times people prayed to Christian saints. Though the desire to be healthy and happy has always been very present, impacting one's health was then merely based on belief. People lacked the knowledge and solutions to feel empowered.

In the 1960s, medical revolutions gave people a feeling of being less at the mercy of the Gods (or luck): mass-produced penicillin saved millions of lives from World War II onwards, the birth control pill enabled women to prevent pregnancy, the tranquiliser chlorpromazine revolutionised psychiatry, and organ transplants became a medical technique for survival. From that point in time, it felt as if we *could* effectively do something about our health if necessary – though that feeling was somewhat diminished in the early 1980s with the onset of the deadly AIDS epidemic. At the time, the ageing population also suddenly faced the rising incidence of the memory-robbing Alzheimer's disease, which attracted considerable media attention. But the increase in heart diseases and cancer was what probably prompted people to take responsibility for their own health.

This coincided with an all-time high in alcohol consumption and the increased popularity of fast-food restaurants. Even after years of advancement, people found that medical science couldn't solve everything. So they started taking care of themselves. The fitness craze in the 1980s was probably the first strong indication that people *wanted* to influence their health. But it was also visible in other trends. According to Gallup (2018), more people stopped smoking in the 1980s and alcohol consumption never ever again hit the peak it did in the 1970s. This was perhaps the first time people were actively preventing their health from becoming worse. It was also the period when governments launched their initial small-scale preventive measures.

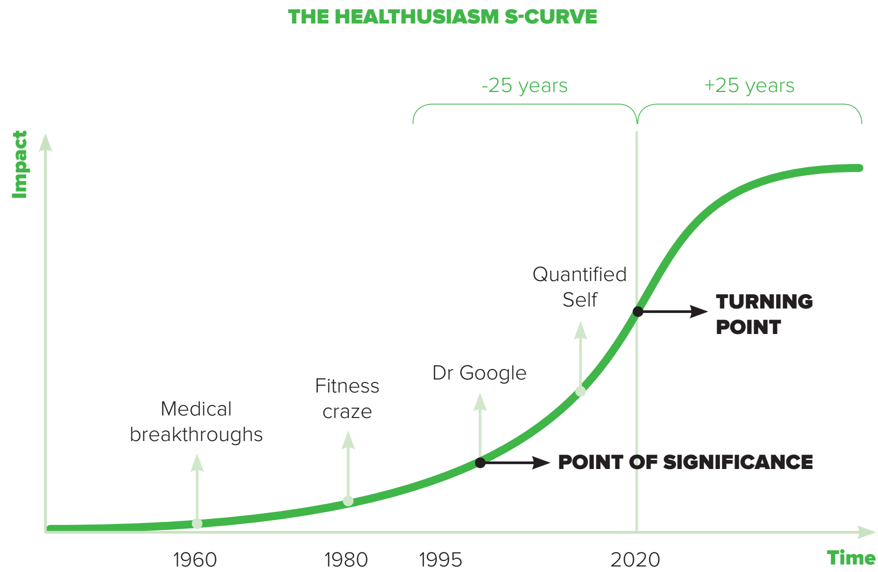
PEOPLE WHO SMOKED CIGARETTES IN THE PAST WEEK



Source: Gallup 2018, "Have you, yourself, smoked any cigarettes in the past week?" (% yes)

In the following decade, the widespread success of pharmaceutical blockbuster products continued to illustrate the general willingness to better one's health. But real personal influence on one's own health was still limited. It wasn't until Dr Google came along in the early 2000s that people really started feeling more empowered. With all the valuable information and tools that followed, we felt more capable of actively measuring and impacting our health. The term Quantified Self was coined to describe the widespread practice of logging personal metrics. These measurements allowed us to build knowledge about our own health. Our prayers were finally answered – we could now influence our health – and we became really Healthusiastic.

But we are only scratching the surface of its potential. As the impact of digital disruption lagged in the health and medical scene, it is likely that we will now see rapid introduction of the Healthusiastic advantages of technological innovation. This empowerment is highly anticipated, because its positive impact in other industries has already been experienced. The expectation is that it will increasingly empower us to answer the basic human need that has prevailed for millennia: to be healthy and happy.

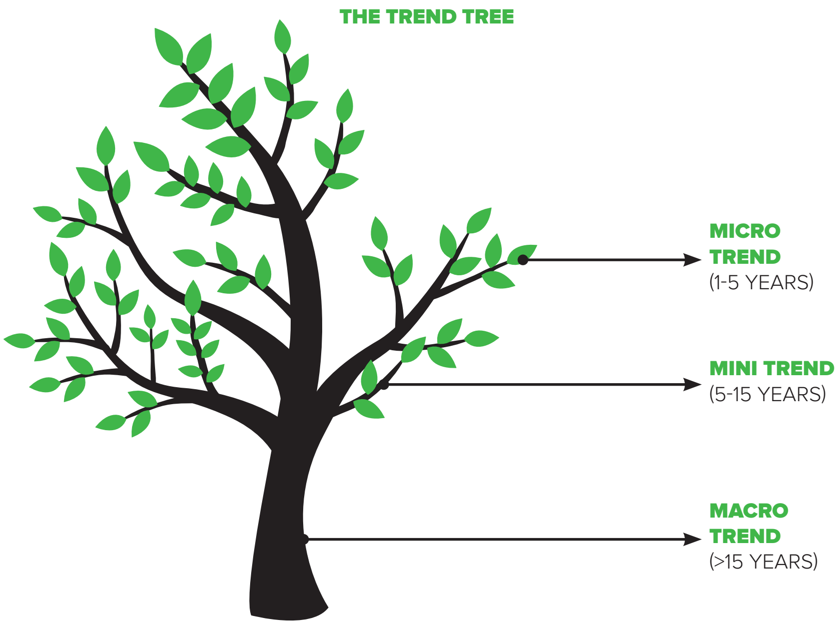


The Healthusiasm S-Curve: We are now at the turning point where actively managing your health and happiness has become the new normal.

The Macro, Mini and Micro trends

The Healthusiasm trend to actively impact one's health and happiness is a Macro trend that has already been around for a number of years. With about 50% of the population now actively managing their health, it has grown past its turning point into the new normal. Its impact on our society means it has become indispensable and unavoidable. Healthusiasm will not disappear in the way a particular fashion item could lose its appeal. This "risk" of rapid disappearance is the case only for Mini and Micro trends, which are derivatives of the Macro Healthusiasm trend.

The relationship between those different trends can be compared to a tree. It all starts with a seed from which a slim trunk with a few twigs and leaves develops. As the years pass, the trunk grows thicker, more branches appear and with every season more and more new leaves grow that are only slightly different from the previous ones. A Macro trend is the basis and, just like the trunk of a tree, it can live a long life, perhaps even beyond 50 years. Mini trends are the branches that originate from the trunk. These can easily last for 15 years. Micro trends are like the leaves that change a little every season.



Although Mini trends grow from Macro trends and last for many years, they don't intrinsically change our values and aspirations that much. However, they are more visible than Macro trends and are therefore more frequently covered in the media. Think about how the trend to connect and share, among others, has been widely debated in discussions about social media. Or the trend towards less desire to own material things, reflected in articles about carsharing. Of course, some Mini trends that are currently in the media might originate from the Healthusiasm trend: for example, think of how the fashionable, healthy image of celebrities became the perfect soil for a new Mini trend that originated from the aspiration to become as healthy and happy as possible. For as long as time, people have been attracted to the lifestyle of the famous, who always look so amazingly beautiful. If only we could become as healthy and beautiful as them.

Well, in a world where everyone can become who they want to be, celebrities are now helping others to live healthily too. They share their work-out routines, food choices, sleeping habits, and reading materials. These allow anyone who has the ambition to live (and look) like certain celebrities to follow their healthy lifestyle. Some celebrities have been elevated to a status of health guru as a result. Some even grasped the opportunity to build an entire business empire on this Mini Trend.

> *Gwyneth Paltrow, who started her wellness brand* ***Goop*** *back in 2008, now leads a company valued at USD250 million. Jessica Alba's* ***Honest Company****, which offers chemical-free baby products and natural make-up is valued at USD1 billion. These two celebrities are probably the most successful examples of the Mini trend in which people aspire to become as healthy and perhaps as happy as celebrities. And there are many others too. Former top models Elle MacPherson and Cindy Crawford each launched well-being products that might persuade women to drink and eat like them. Hillary Swank and Beyoncé are known for their focus on fitness routines, and these stars both launched activewear collections that allow customers to move like them. No matter who the adored celebrity is, fans need not only admire them from afar; they are now able to learn from and live like them.*

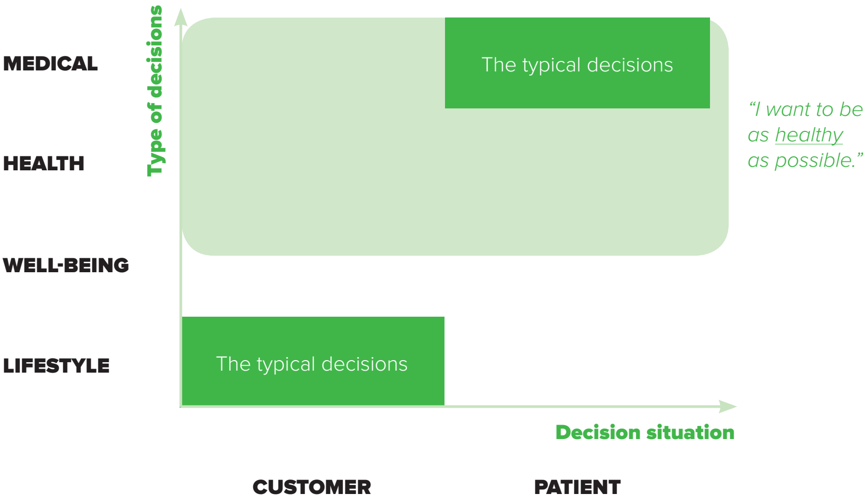
While the above examples might last several more years, other products and services that come with Lifestyle, and perhaps some of the Well-being decisions, are more at risk of disappearing quickly. Walking around holding a smoothie might go within a couple of years. Wearing activewear during the day will not remain as fashionable as it is today. Both are riding the wave of the Macro Healthusiasm trend but should rather be considered Micro trends. These are the leaves annually growing on the Trend tree. We discuss and obsess over these every day. They are the lifestyle decisions that showcase the identity we want to create, so these decisions tend to evolve and shift quickly, as do other hyped products and services. These products and services are rapidly disseminated, and become less attractive just as rapidly. The same is true for some well-being decisions, which have been as much part of Micro trends as lifestyle decisions. Think of all the different diet fads that have come and gone in the past 100 years, the Gwyneth Paltrow endorsed popularity of cupping massages 10 years ago or (perhaps) the recent boom in breathing sessions.

Healthusiasm is a long-term Macro trend that finally answers the desire to be in good health. This need has always been prevalent, but the information and tools have now pushed it beyond the turning point of the S-curve. Becoming as healthy and happy as possible is the new normal. It's no longer a hidden secret, nor is it dependent on belief or prayers. Reinforced by the Transformational Economy, self-actualisation and the possibility to become who you want to become, Healthusiasm is the achievable aspiration to be as healthy as possible.

Because the healthier you are, the happier you can become. People strive to go from sick to healthy, from healthy to happy.

From sick to healthy, from healthy to happy

Healthusiasm is a Macro trend because it answers an aspiration that is relevant for many people. This aspiration is the life-long personal desire to become as healthy and happy as possible. The graph below visually maps the Healthusiasm trend and how Healthusiastic decisions go beyond the typical customer or patient decisions.



Healthusiasm model: Decisions people take to be as healthy as possible.

Health and Medical decisions are generally taken to stay or become healthy. Sometimes, even specific Well-being decisions can contribute too. They help both patients and customers to achieve the level of physical and mental health they would like to attain, maintain or prevent from becoming worse. It is obvious that everybody wants to be healthy, but it is rather new that we actively want to impact our health as much as we do today. But in a time where digital disruption has taught us that we can become who or what we want to become, we desire that same level of impact on our own body. That is one of the main reasons why people want to impact their own health with Healthusiastic decisions: **It's our damn body and we want to have an impact on it.**

Knowing that the customer wants to impact his own health, is your company doing everything possible to help him with it? Or are you shying away from taking as much responsibility as your own customer?

More intriguing, however, is why people are making Healthusiastic decisions to become happy. What is the link between these decisions and happiness? So it might be worthwhile to look deeper into what happiness means for us. It is critical to understand that happiness does not necessarily (or only) mean having fun at a party, the thrill of sex, feeling excited about a new experience, or the joy of a tasty meal. These are all pleasurable moments, but they are fleeting. They may all contribute in some way to one's happiness, but happiness is not merely about chasing pleasure. Happiness is when life fulfils your needs. Therefore, happiness can be considered as a changeable state of general satisfaction with your current situation. Happiness is not a long-lasting, permanent feature or a personality trait. It is dependent on multiple factors such as income, family, social relationships, environment (for example, safety), values and, of course, health. You might rightfully recognise these factors as the needs of the Maslow Pyramid, regrouped earlier in this book as Functional and Emotional Needs. Having these needs fulfilled makes you happy. But even if these needs are largely fulfilled in the Western world today, it remains a challenge to keep them fulfilled over time. Often, the effort is not only in attaining but also in maintaining happiness.

> *Imagine the life of someone in her 30s who is married to the man of her dreams four years ago. Together they have a two-year-old daughter who requires a lot of attention and time-management from them both. She has a career that really kicked off a couple of years ago and promises a rosy future. Running is one of her passions. It makes her forget about everything for a moment, and keeps her in shape. She has a really good bond with her friends from college. Being with them brings laughter and joy, as ever. With all these functional and emotional needs fulfilled, she really considers herself happy with her life. But it might be quite a challenge to keep these needs fulfilled over time. She has to be a well-organised mum, a loving partner, a*

> *productive colleague, a friend who is always available… This often comes with a lot of stress that drains energy. So it is really important for her to maintain her physical and mental health and have enough energy to meet all these expectations. That is exactly why she focuses on being as healthy as possible. Because healthy means happy. A healthy body helps her attain the highest possible energy. This energy will help her in maintaining what she has and who she wants to be. Energy will make her happy.*

Instead of selling product features or service levels, how can your company actually sell true happiness?

Depending on your personal situation, one or the other of the needs mentioned above may play a more important role. It will define happiness as a more concrete aspiration to be fulfilled and an additional reason to live healthily. *Energy* facilitates happiness for the young woman in the example. *Beauty* might promote happiness for the young adolescent. *Balance* might aid the parent in being happy with becoming older. Most likely, *enjoyment* means happiness for the retired senior with grandkids. Whatever one's life situation, each of the functional and emotional needs will have a different degree of importance and result in a specific driver for being as healthy and happy as possible. If you want to enjoy your experience as a grandparent, being healthy will certainly help you. If you aspire to radiate beauty, good mental and physical health will help you achieve that.

LIFE SITUATIONS DEFINE WHAT HAPPINESS MIGHT MEAN FOR YOU

Beautiful
(15-30 years old)

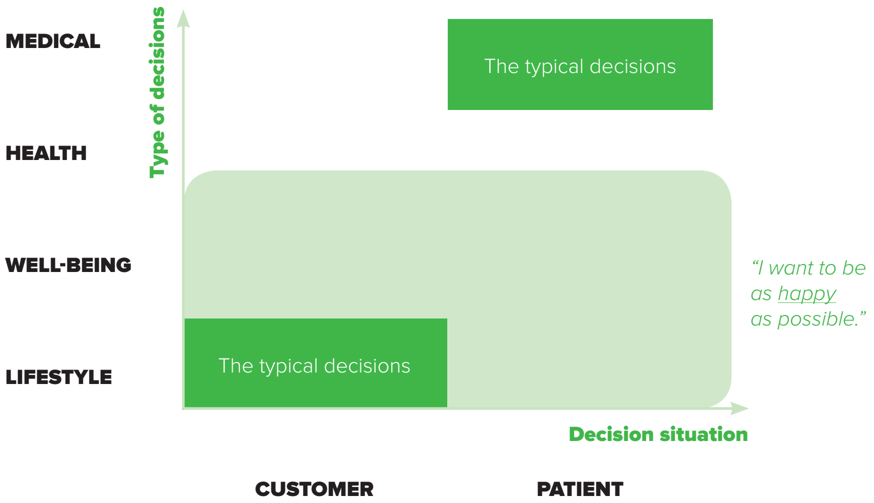
Energetic
(30-45 years old)

In balance
(45-60 years old)

Enjoying
(+60 years old)

Example: the potential drivers for different people to live healthily and become as happy as possible.

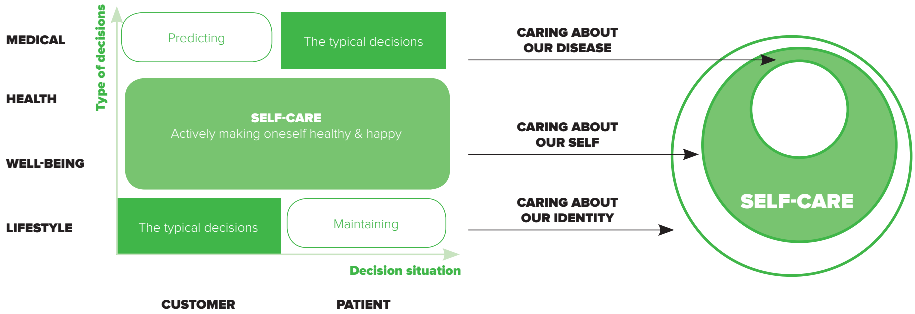
Whatever the specific personal driver, Lifestyle and Well-being decisions are the ones predominantly taken to impact happiness. Some health decisions can also contribute. People may not have to deal with a disease yet, or they might not think specifically about preventing diseases, but they are keen to be as healthy as possible. They will actively try to live healthily, because it helps them to be happy.



Healthusiasm model: Decisions people take to be as happy as possible

Self-care & wellness

In the Healthusiasm model depicted on page 129, people make different types of decisions that are health-related. **Medical decisions** help us to take care of our (future) diseases by *managing* or *predicting* conditions. With the many everyday **Lifestyle decisions**, we *establish* our identity, and when living with a disease, even *maintain* our identity. But we really "care about our self" when taking **Well-being and Health decisions**. These are the decisions that either make us feel good or help us maintain our health. Self-care is the over-arching name of the driver behind these decisions, and it's hugely popular today.

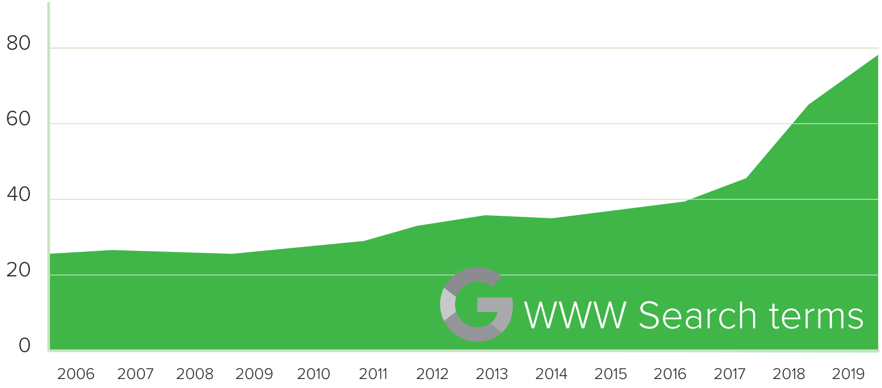


But self-care hasn't always been so popular, because it implies putting yourself first. In the past we were conditioned to believe that this is wrong, or even selfish, because the word "self" seems to be about the individual only. We were meant to suffer and endure hardship. People like Gandhi and Mother Teresa were examples to our society because they exemplified self-sacrifice and suffering. Self-care, on the other hand, was considered indulgent.

Self-care became increasingly important as more and more people reported anxiety, sleep troubles, and irritability. Often, people feel that they aren't ageing well, don't feel good physically, or simply feel exhausted. These symptoms have always existed, of course. But our perception of this, and the way we deal with it, has changed radically. During the Renaissance, exhaustion was seen as an inherent weakness. When monks, for example, went through spiritual weakness (which is what exhaustion was called), it was a sin they needed to cope with. And melancholic people were said to suffer from the impact of Saturn. It is only since the mid 1800s that doctors and philosophers started pointing to the changes in society and the demands of modern life as additional causes of exhaustion. In current society, these demands have not decreased: relentless emails, chattering social media, the lack of boundaries between work and private life can eventually bring us to the edge of exhaustion, or cause us to feel unwell or experience sleep troubles. With the oversupply of information today, an additional cause may lurk. We are now aware of both Mariah Carey and Pope Benedict XVI suffering from burnout. We know about the pregnancy struggles of Beyoncé and the heart failure of Luke Perry. Even within our very own environment, we now sometimes feel as if everyone we know is sick to some extent: someone has poor digestion, someone's son has autism, another is burned out… This ubiquity not only makes it socially more acceptable, but also gives the impression that it will eventually happen to you too. This drives us to act. But we are very confused about the right thing to do. We want to eat healthily but herbicides are used on all our foods. We know we lack vitamin D but we have to wear tons of sunscreen when we go out. No wonder people are increasingly looking for answers to take better care of themselves. Nothing really showcases this need for answers more effectively than the fact that the number of Google searches on the term "self-care" have doubled in the past two years.

SELF-CARE

Actively making oneself healthy & happy



Relative amount of search terms across years

Google Trends Data April 2019

Technology does indeed offer answers to questions and, as in any other domain, self-care is also highly influenced by it. As we keep our smartphones close to us, we can rely on them for moments of self-care. Think of the popularity of running apps, meditation apps (like the aforementioned Calm), or food apps that offer information, coaching, or tools to keep records. Self-care was in fact the most popular app theme in 2018, according to Apple. These self-care apps turn our phone into a device that is perhaps less about likes and filters, and more about you and your happiness. Perhaps it's no coincidence that the rise in screen time runs parallel to the popularity of self-care. But it's not enough to just feel better. These apps are also here to affirm that we are doing the work, that we are indeed improving ourselves. Self-care apps could be regarded as a new and more impactful delivery system than the CDs, books and videos that were already proffering self-help. They now allow us faster and easier access to tools and knowledge to take care of ourselves. That said, self-care is not limited to these apps.

Business consulting firm Stella Rising (2018) reported that 95% of people link self-care with healthy habits. It's no longer considered as pampering or indulgence, or as "selfish". Self-care is the key to a healthy and happy life. It is really about becoming the best version of yourself (self-actualisation), which in turn fosters good relationships with yourself and others. Stella Rising (2018) disclosed that more than half of the respondents believe that self-care is important for their own well-being. The report also states that these people are proactive in caring for themselves. It could be as simple as going to bed earlier on a specific night, or as hard as changing your habits to live more healthily overall. It's manifested as a group of different behaviours that are often also labelled as "wellness" activities. They range from eating healthfully or indulgently, to spending time alone or seeing friends, and working out or taking a rest day, depending on your personal needs. **Wellness is the active pursuit of self-care.** But it also refers to the overarching term for businesses that offer products, services or experiences to support people in actively taking care of themselves.

"Wellness is not a word that you hear every day," Dan Rather said in 1979, during *60 Minutes*, one of the greatest TV shows of all times. Back then, wellness and the people who were proactively taking care of themselves were presented as a cult. Today, however, wellness is pervasive: on television, in magazines, and in any store you might walk into. This industry helps a broad range of people to become healthy and happy. Euromonitor called wellness one of the top global consumer trends in 2017. It is used to make hotel rooms more pleasant, to transform flights into a moment of self-care, or to make co-working spaces more attractive for health-conscious workers. These are the type of businesses Healthusiastic people choose when making well-being or health decisions.

Wellness is the answer to the increasing desire to take care of oneself. It is a part of the bigger aspiration of be(com)ing as healthy and happy as possible. This Healthusiasm trend is influencing all industries. It offers a new range of opportunities to connect with customers. But it also contains the potential pitfall of becoming irrelevant if the expectations of the growing group of Healthusiastic customers are not met. Much as companies that still use plastic 10 years from now will have become irrelevant for their customers, companies that don't feed into the Healthusiasm trend will be eradicated as well.

The Healthusiasm business

The objective of this chapter is to offer a glimpse into how Healthusiasm affects various industries, their size and segmentation, and how it influences the dynamics within and beyond the boundaries of these industries.

Healthcare and medical Industry

In 2017, the global healthcare and medical business was worth about USD8 trillion, making it undoubtedly one of the largest in the world. This industry consists of healthcare services (hospitals, care institutions, diagnostics laboratories), pharmaceutical drugs, medical devices, biologics and the up and coming DNA sequencing business. With the growing and ageing population, clinical and technological innovations and rising labour costs, this business is expected to grow to between USD10 and 12 trillion by the year 2022, depending on the reports consulted. It would then represent about 10% of global economic output.

As the healthcare and medical business is primarily funded by governments and payers (like insurance companies), this growth puts its financial viability under enormous pressure. That's why the objective of the industry is no longer limited to improving care and health, but to a reduction in spending. This imperative will impose radical changes on its functioning because it is likely not possible to charge patients more. The industry will need to innovate and experiment with new business models and care delivery to realise affordable, high-quality healthcare solutions.

One of these changes is the intention to switch from a fee-for-service model to an outcome-based financial model in which payments will be based on the actual value delivered to the patient. Another considerable change is the switch from costly hospital care to convenient home care. Both these changes promise to make the healthcare industry somewhat less expensive, but this will entail efficient collaboration from all stakeholders. Their patients will be held responsible for their decisions and actions, which will motivate them to focus on prevention and care. Patients will be accountable for their own medical condition to a greater degree than before.

Although this change induces fear within the healthcare industry, the increase in responsibility assumed by the patient does fit well with patient involvement in medical decisions within the Healthusiasm trend. Today, about half of patients are actively involved in medical decisions. But with greater involvement, patients are also becoming more demanding. They expect similar experiences to those they receive in other industries. And currently, people are really dissatisfied with the access, the poor information and the service they receive within the healthcare industry. They increasingly insist on transparency on price, quality and safety. Patients demand more impactful customer service from their healthcare provider. These accelerating patient expectations are putting pressure on the healthcare sector.

Healthcare organisations certainly have become somewhat more patient-centric in the past couple of years. Challenged by the different waves of digital disruption, more organisations look into seizing the opportunity to serve people better. But this necessary change does not come easily to the industry. After all, healthcare providers have not really been trained to deal with demanding customers, regulations are not a good fit with an agile technology-driven world, legacy infrastructures are not easily replaced, and, above all, the healthcare industry is simply unused to dealing with customer-centricity. The industry has always been predominantly preoccupied with medical care as an internal process or a scientific practice. Pushed by the financial imperative and the Healthusiasm trend, the patient should no longer just be part of the processes or the scientific context but put at the centre of healthcare. Patient experience should become a core value. To be successful in this patient-centric environment, a deeper understanding of people's expectations is vital.

This new patient-driven dynamic in the healthcare and medical industry will unlock the opportunity of establishing a more fruitful two-way relationship between the healthcare provider and the patient. It will engage patients far more. Establishing involvement and customer service will improve the overall patient experience, and even increase convenience for healthcare providers. With non-traditional companies slowly infiltrating their industry, customer experience will be mandatory for the business outlook of these healthcare and medical businesses. Technological companies like Amazon, Google, Walmart and Apple, which are particularly known for their customer experience, might slowly but surely substitute parts of the current processes and tools. Simply because patients will request their healthcare solutions. The medical industry needs to be prepared for these major changes in the back end (processes and infrastructure) and in the front end (patient-driven dynamic).

With people increasingly expecting organisations to help them become healthy and happy, is the patient really at the centre of your business? Or is he part of the context without really understanding his deeper expectations?

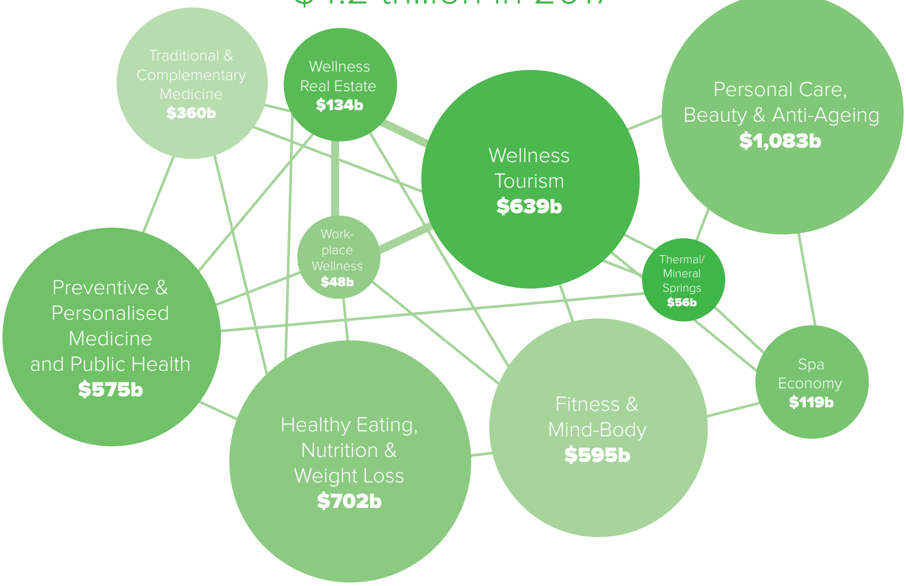
Self-care and Wellness industry

Traditionally, people only took an interest in their health when they were unwell. These customers were part of the healthcare and medical industry that revolved around treating rather than preventing disease. But healthcare costs are rising faster than the GDP of most developed countries. Knowing that modifiable behaviours account for 71% of annual deaths globally, it becomes increasingly important to deal with those behaviours. As described in the previous section, the healthcare industry is therefore increasingly focusing on self-care and prevention, not least in introducing outcome-based models. But customers themselves are also increasingly aware that their health problems are related to their health and well-being decisions. The wellness industry could be very useful in the area of prevention.

But the wellness industry isn't driven primarily by doctors and governments. Wellness is mostly customer-driven. If our contact with the wellness market was previously limited to an occasional visit to the gym or sauna, in the past few years consumer behaviours have changed profoundly. For more and more people, self-care and wellness is evolving from rare to daily, from episodic to essential, from a luxury to a dominant lifestyle value. From sunup to sundown, people want to be(come) and feel healthy. It affects their decision-making when purchasing food, reducing stress, or incorporating exercise because they expect it to improve their happiness in terms of having more energy, feeling beautiful, or being able to enjoy life.

Today, the self-care and wellness industry is one of the most lucrative businesses to be in because everybody wants better health or strives to be as happy as possible. The Global Wellness Institute, a non-profit research centre that represents 10 sectors under its overarching umbrella, reported that the global wellness economy reached USD4.2 trillion in 2017 far surpassing the pharmaceutical industry. Today, it makes up 5.3% of global economic output. With growth that is twice as fast as global economic growth, it is bound to remain one of the world's biggest and fastest-growing industries.

GLOBAL WELLNESS ECONOMY:
$4.2 trillion in 2017



Source: Global Wellness Institute

In our daily conversations, wellness is most easily linked with healthy eating, weight control, fitness, mental health, and the spa economy. However, these only make up 35% of the self-care and wellness industry. Both Personal and Beauty care, as well as Preventative and Alternative Medicine each make up another 25% of the wellness cake. The biggest growth is realised by sectors such as Wellness Tourism, Lifestyle Real Estate, and Corporate Wellness. These might be less well-known but are becoming immensely popular.

> *With about 830 million wellness trips in 2017, Wellness Tourism already represents 17% of total tourism expenditures. The global Spa market is expected to accelerate and grow by 35% in the next five years, according to Technavio (2018). "Wellness tourism" is the fastest growing travel sector*

> *(Lonely Planet, 2018) while wellness real estate developments make up about 2% of the annual global construction market and are tipping from niche to mainstream (Global Wellness Institute, 2018).*

Driven by their Healthusiasm, people incorporate more wellness values into their lives. This makes their interaction with the wellness economy more holistic and integrative. For example, customers who shop in one particular sector are more likely to buy wellness services in other sectors as well. They approach their health holistically. If you exercise, you are most likely interested in healthy eating as well. If you like spas, you might be interested in wellness trips too. This makes it interesting for different sectors of the wellness industry to blend or to expand from one to another. Think of the yoga classes that now also offer retreats, or how the mental health app Headspace successfully partners with apparel brand Nike.

People also want wellness to be integrated into the different parts of their lives. Fitness, for example, is no longer solely relegated to the gym. It is now integrated into your vacation, workplace, technology or beauty routine. The choice of hotel you book on a business or holiday trip might be determined by the availability and quality of the fitness facilities. At work, you can participate in yoga classes or sit at a "biking desk". Your make-up preference might be one that is sweat-resistant for your after-work workout. As it is part of our daily ambition to live healthily and happily, we expect self-care and wellness to potentially be part of the different moments of our (daily) lives.

With self-care and wellness becoming an integral part of our values, do you know which of your products or services can blend into the different moments of the (daily) lives of customers?

Lifestyle industry

The Lifestyle industry is composed of brands that attempt, through marketing, to embody the values, aspirations, interests, attitudes, or opinions of a group.

Typical Lifestyle brands range from sectors such as electronics, beauty and clothing to furniture and food. They seek to attract customers by positioning their offering in line with the customer's lifestyle. By choosing these brands, people confirm their style of living. Customers establish their identities by choosing brands whose stereotypical users are perceived to be similar to their own self-images. In doing so, brands become a way of life. They sell a lifestyle.

Healthusiasm suits lifestyle brands just perfectly. Earlier, I described how Healthusiasm is not only about managing or predicting a disease, nor is it only about maintaining health or feeling good. In fact, Healthusiasm is also about the desirable image of health-consciousness. Lifestyle brands can play into that specific desire by positioning themselves accordingly. Fitness wearables can confirm someone's healthy image as much as buying that cool bike for the ride to work does. Customers can opt for paint without harmful particles, they can walk around daily in activewear, and can pretentiously buy healthily. Many sectors can be influenced by the Healthusiasm lifestyle because it simply is "cool" for people to be health-conscious today. One of the biggest industries in the world, the food industry, is certainly impacted by the aspiration to be healthy and happy.

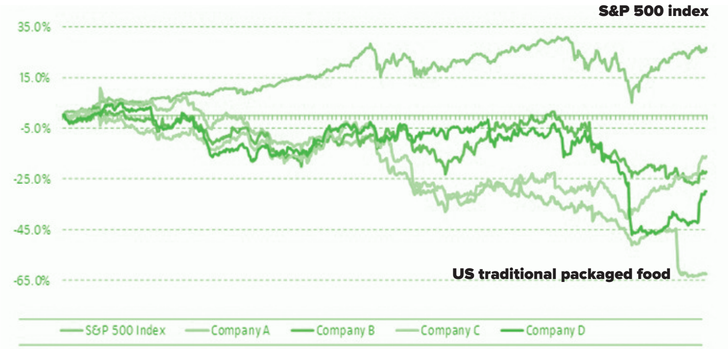
Since the early 1980s, nutrition-related behaviours have emerged as one of the most frequent activities that support health. This behaviour or interest in health is a key motive in the choice of food and gives products with health claims noticeable advantages over competitors. That's why food retailers and manufacturers have eagerly positioned themselves as health friendly, targeting those health-conscious consumers. They responded by increasingly selling healthy food options, providing nutritional information on labels and reviewing the use of additives. Back in the 1980s, Tesco established a list of contentious additives to remove from its products and had labels on all of their products by 1987. Other food corporations soon followed that example as companies like Pizza Hut stopped using artificial flavours and colours.

Today, food and beverage companies still focus continuously on making products healthier. But in the meantime, with an annual growth of 8%, organic food has replaced "sugar free" and "low carb". Kraft Heinz recently spoke about giving their well-known brands a health update, because sales of their non-organic products like Capri Sun have declined in recent years. Suntory, the company that brings you Orangina and Schwepps, among other consumer beverages, changed their company's mission to "growing for good" and aims to contribute to a healthy lifestyle through products and services. Deloitte confirmed that 88% of companies have launched products that were formulated or reformulated to support healthier diets and lifestyles.

Technavio analysts forecast that this trend will not stop any time soon. The healthy lifestyle food market is expected to grow 6% annually in the next five years. In fact, the entire USD13 trillion food and grocery retail industry will continue to develop at a similar pace, with non-packaged healthier foods at the forefront of the market. Failing to establish a health-conscious image certainly puts food companies under heavy pressure. In fact, revenues of most of the US-based traditional packaged food producers have fallen considerably since 2017 compared to the overall S&P 500 Index.

US TRADITIONAL PACKAGED FOOD VERSUS THE S&P 500 INDEX

(Jan 2017 - March 2019)



Source: Robeco Trends Investing

It is very difficult to put an exact value on the Lifestyle industry. There are so many sectors involved, even more brands and products, and desired lifestyles vary. Intelligence provider GlobalData, then called Conlumino (2014), analysed the UK retail market, attributing certain brands to the Lifestyle industry. They reported that between 2008 and 2013, the lifestyle brand segment in the UK grew almost 12 times as fast as the overall market. Actually, the main growth within the retail market came from the Lifestyle brands that identified themselves with the characteristics that matched aspirations like be(com)ing healthy and happy. From its position as the smallest segment in the market, the Lifestyle industry grew bigger than the Luxury segment. Brands that help customers to confirm their health-conscious image are now more attractive in the market than traditional luxury products.

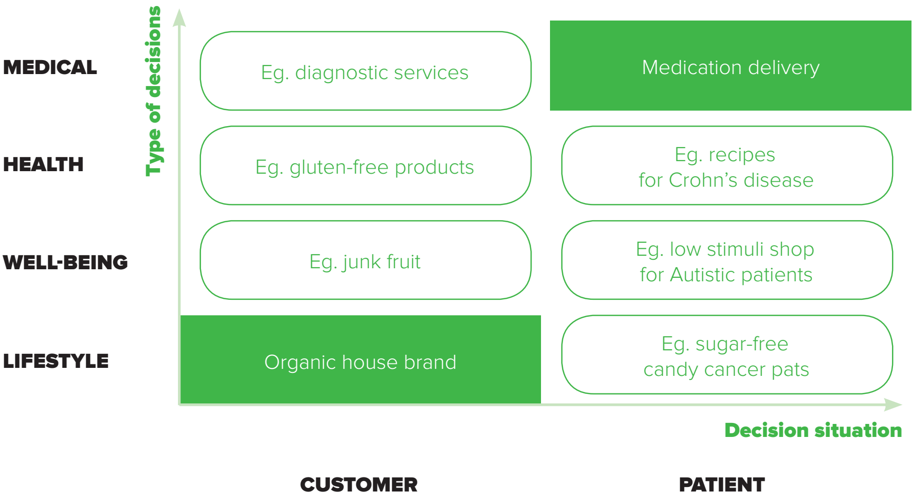
What attributes of your business play rightfully into the health-conscious image of your customers? What actions can you take to sincerely speak to their health concerns?

Healthusiasm Business

Healthusiasm is here for the long haul. It's very much present within different industries and requires companies to approach their customers' aspiration to be(come) healthy and happy more strategically. But while Healthusiasm is changing the dynamics within the Medical, Wellness and Lifestyle industries, it also creates new opportunities beyond the boundaries of each industry. Customer expectations towards a company don't just stay within industry boundaries. After all, Healthusiasm is now ingrained in our lives. Companies can mean something to their customers beyond the offering of their typical industry-related products and services. That's why many companies from one particular industry are now expanding their offerings into other industries. Lifestyle brands are moving into the Wellness and Medical industry, as much as medical companies are moving into the Wellness business. The three following examples will showcase how companies or brands can address expectations that were previously met by different industries, or not all. This drive to help people be(come) healthy and happy is typical for the Healthusiasm business.

Supermarkets

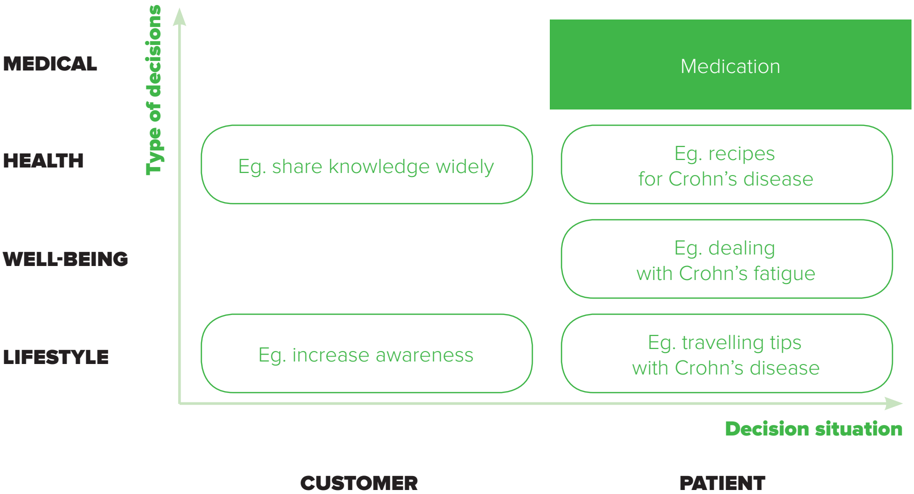
Supermarkets from around the world now offer several services or experiences that meet the typical customer expectations within the Lifestyle, Wellness ànd Medical industries: an entire section of their store is dedicated to healthy foods so that health-conscious customers identify themselves with the space. To offer their clients convenience within their hectic daily schedules, the retailer has extended opening hours. Wallmart, for example, organises several times a year a "health day" during which customers have their health analysed and can discuss it with professionals. For shoppers with particular sensory needs, like patients with autism, PTSD or dementia, it has already been mentioned that retailers start offering a sensory-friendly shopping experience with noise-cancelling headphones or even open the store exclusively to these customers at specific times. Patients with Crohn's disease can easily find recipes that are appropriate for their bowel syndrome. The same goes for diabetic patients, arthritic patients and many others. The in-house pharmacy can then again allow patients to shop for everything in one location. No longer is the supermarket just a place where customers can buy goods, but where they can experience services tailored to their specific needs. Both patients and customers can purchase products, services and experiences that make them healthy and happy. Retailers are expanding their offering in the light of the Healthusiasm trend.



The cross-industry supermarket example

Pharmaceutical companies

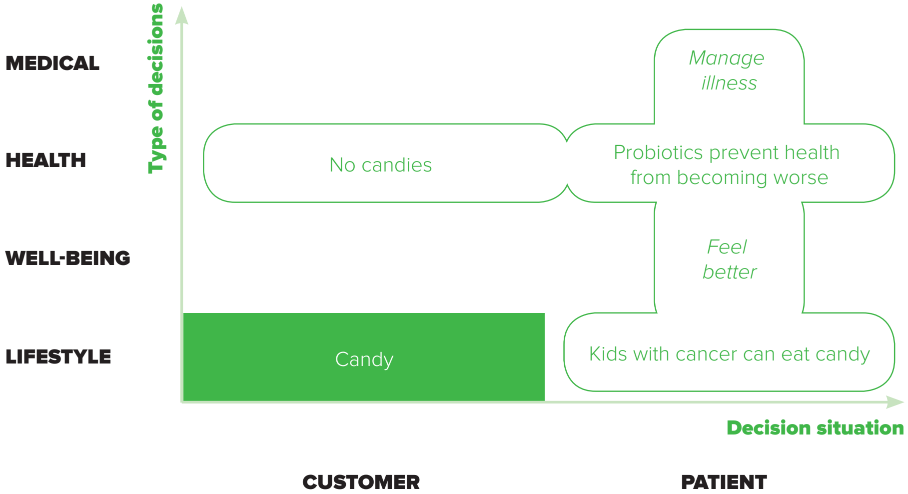
Today, pharmaceutical companies no longer sell only medications to patients. A company with a medication for Crohn's disease now also offers recipes that help sufferers to avoid symptom-inducing ingredients. They help patients to deal with disease-related fatigue by providing them with insights into how to feel better physically. In collecting and sharing tips from other patients, they motivate them to continue to live the lifestyle they desire. Travel tips, work-related documents, or conversation starters can all contribute to improving the patients' lifestyle. With their expert knowledge of the functioning of the intestines and the potential development of bowel syndromes, pharmaceutical companies can also advise people on how to live more healthily. They can even put their scientific knowledge of the bowel at disposal of all people out there. No longer are they purely manufacturers of medication. They are providing patients and non-patients with the necessary help in taking Healthusiastic decisions every day. However, these services are still largely contained within the medical industry, but it should not necessarily be the case. Channels outside the medical industry, like supermarkets, wellness centres, or beauty magazines are sometimes even better placed to reach people with that information.



The cross 'industry' pharmaceutical company example

Dr. John's Healthy Sweets

Finally, single products are meeting expectations beyond the boundaries of a single industry. **Dr John's** candies are a good example. When dentist Dr John Bruinsma realised that sugar-free sweets tasted terrible, he started a company to create great tasting sugar-free sweets. His intention was to bring an alternative to patients with many cavities, within the boundaries of the dental industry. About 20 years on, this company has become the most innovative and healthiest sweet manufacturer in the world. By creating the world's first xylitol-based lollipop, he actually created the first popular sweet that prevents cavities. Thanks to the use of xylitol, the bacteria in the mouth that cause dental decay decrease in number, lessening the chance of a new cavity forming. Just recently, Dr John's company also released a nutritional line of sweets that contain fibre and probiotics. This allows children with cancer, for example, to enjoy a "sweet" and experience a normal childhood delight. And the added fibre and probiotics are critical in both preventing the child's health from becoming worse and managing their compromised immune system. What started as a sugar-free sweet for people with lots of cavities grew to become a popular sweet sold on Amazon, meeting expectations far beyond the boundaries of the dental industry. **Thrive Ice Cream** is a similar example of a product in the healthcare industry that not only addresses malnutrition in the elderly, but also helps athletes to perform better and supports customers with weight management.



The cross 'industry' candy example

What expectations that previously were met by business from different industries would organically fit or extend your business expertise or knowledge?

Healthusiasm summary

In a world where technology increasingly meets our needs, people are becoming more aware of their health and happiness. At least half of the population, regardless of whether they are sick or not, actively manages their health. But in fact, everybody is more health-conscious today than they were in the past. More than ever before, both men and women are focused on living healthily. And while each generation may have their own background and current reality as a source of motivation, today they all strive to be(come) the healthiest and happiest version of themselves. Every day people are making decisions to be(come) healthy. Every day, they are making decisions to be(come) as happy as possible. While this often may look like a very cool and fashionable thing to do, this trend is certainly not short-term hype. It is actually a radical societal shift that has been growing on us for many years. Being healthy is a fundamental need. We've always believed we could positively influence our health, even by praying to the gods. But digital disruption has finally made it possible for us to have an impact on our own body. We can go all out to become the person we want to be. This empowerment has slowly changed our society and has become the new normal. Customer expectations have changed because of it and are even altering the dynamics within each industry.

Today, companies are looking for ways to make their customers healthy and happy. They offer the products, services and experiences that mean something to their customers, and won't let the industry boundaries limit them in doing so. The only way to truly connect with customers today is by bringing transformations to the market that fit their aspirations and values. That's why marketing is evolving from being product driven to being meaningful to the customers and their aspirations.

In the next chapter will be explained how marketing evolved into something transformation-driven. Health marketing will then be elaborated upon as the version of transformation-driven marketing that fits the Healthusiasm trend. With examples from different industries will be illustrated how companies and brands are meeting the customers' need to be(com)ing healthy & happy. Finally, a specific focus will be held on how the healthcare and pharmaceutical sector are growing towards transformation-driven health marketing.