Kantar’s multi-pronged exploration of wellbeing
Meet your hosts for today’s session

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The Mainstreaming of Wellbeing

Wellbeing has become the central motivation and primary consideration for consumers across categories.
The evolution of wellbeing is coming from myriad directions.
As a result, wellbeing goes far beyond the absence of illness.
No matter what business you’re in, wellbeing must be a strategic focus.

Global Wellness Economy
$4.5 Trillion Market

- Personal Care, Beauty & Anti-Aging: $1,083b
- Physical Activity: $828b
- Workplace Wellness: $48b
- Preventive & Personalized Medicine and Public Health: $575b
- Thermal/Mineral Springs: $56b
- Spa Economy: $119b
- Physical Activity: $828b
- Thermal/Mineral Springs: $56b
- Personal Care, Beauty & Anti-Aging: $1,083b

- Traditional & Complementary Medicine: $360b
- Preventive & Personalized Medicine and Public Health: $575b
- Workplace Wellness: $48b
- Mental Wellness: $121b
- Wellness Real Estate: $134b
- Well Being: $360b
- Mental Wellness: $121b
- Wellness Tourism: $639b
- Workplace Wellness: $48b
- Healthy Eating, Nutrition & Weight Loss: $702b
- Thermal/Mineral Springs: $56b
- Personal Care, Beauty & Anti-Aging: $1,083b

- Source: Global Wellness Institute

Note: Figure for Mental Wellness is for 2019; figure for Physical Activity is for 2018; figures for all other sectors are for 2017. Numbers do not add to total due to overlap in segments. Dark colored bubbles are the sectors for which GWI conducts in-depth, country-level primary research. Light colored bubbles are sectors for which GWI aggregates global estimates only, drawing from secondary sources.
Look who’s getting in on the wellbeing action

Businesses are no longer staying in their traditional swim lanes, creating disruption to the wellness category.
Real Estate

WELL Building Certification
Key West’s Personal Space Campaign
Mahaton’s Self-Cleaning Reusable Bottle
We’re here to help you go from borrower to saver. And we know you’ll be happier for it.
People and their Wellbeing: A Closer Look at the Important Drivers of Wellbeing
Seven major drivers of wellbeing

01 Digital Health
02 Environmental Health
03 Home Health
04 Social Health
05 Emotional Health
06 Financial Health
07 Physical Health
well-being /ˈwel ˌbēiNG/
noun
the state of being comfortable, healthy or happy

The Core Dimensions of Wellbeing and The WellBEINGS

- Physical
- Social / Emotional
- Financial

OXFORD ENGLISH DICTIONARY
The WellBEINGS Segmentation

- Built from the U.S. MONITOR
- Six (6) unique segments that vary in their priority and focus on these key wellbeing dimensions
- Insights on brands, marketing and broader issues
- Projected onto a marketing database of 240 million U.S. adults for immediate activation on your CRM system and online and offline platforms.
Meet the WellBEINGS Segments

BEST INTENTIONS

ENGAGED EXCEL-ERATORS

IMPATIENT INVINCIBLES

NONALIGNED INVESTIGATORS

GENIAL GLIDERS

SAVVY STANDOUTS
Meet the WellBEINGS Segments

**BEST INTENTIONS**

- **POSITIVE – ALTRUISTIC – OPTIMISTIC – HARDWORKING**
  - 9%
  - “I find purpose in helping others and the broader world but could use advice and products to help me better manage my own health and finances.”

**ENGAGED EXCEL-ERATORS**

- **HOLISTIC – PROACTIVE – BALANCED – PROTECTIVE**
  - 7%
  - “I’m disciplined in all areas of life. Holistic health is my mantra as I seek balance across all aspects of my wellbeing, and I’m happy to invest in myself.”

**IMPATIENT INVINCIBLES**

- **OPTIMISTIC – AMBITIOUS – EXPERIMENTAL – PRESENT-MINDED**
  - 24%
  - “I set a high bar for myself and push to excel at all times. I’m on track with my physical health but I stress about being able to achieve the goals I’ve set for my finances and relationships.”

**NONALIGNED INVESTIGATORS**

- **DIY’ER – SKEPTICAL – SELF-RELIANT – ENTERPRISING**
  - 25%
  - “I trust myself to get through life and I have concerns about ensuring a secure retirement down the road. I’m in the driver’s seat so don’t tell me what to do - give me the keys and I’ll take it from here.”

**GENIAL GLIDERS**

- **CONTENT – RISK-AVERSE – COMPLACENT – HEALTH BLINDERS**
  - 19%
  - “I’ve worked hard to get where I am today! But my indifference towards my health has started to catch up with me. I’m worried my health challenges may hamper the happy retirement I’ve been counting on.”

**SAVVY STANDOUTS**

- **AFFLUENT – RESPONSIBLE – BIG SPENDER – GENEROUS**
  - 16%
  - “My focus on my finances has paved the way for a lifestyle where I can truly relish in what I’ve accomplished. I’m willing to splurge – on myself, my health and others. It’s nice to be able to share my good fortune.”
Physical Wellbeing Dimensions

- Health attitudes and behavior
- Nutrition, diet, exercise
- Self-reported health conditions
Diet and exercise are staples to physical wellbeing prioritized by some more than others.

Importance to overall wellbeing: extremely / very important

- Eating A Healthy Diet
  - 76%
  - 81%
  - 67%
  - 65%
  - 63%
  - 75%

- Exercising On A Regular Basis
  - 65%
  - 72%
  - 62%
  - 57%
  - 49%
  - 69%

Source: Kantar U.S. MONITOR 2020
Some segments demonstrate a deeper commitment to healthy behavior more than others

1. **I do everything I can to promote and maintain my personal health and wellness (Total Agree)**
   - BEST INTENTIONS: 83%
   - ENGAGED EXCEL-ERATORS: 86%
   - IMPATIENT INVINCIBLES: 74%
   - NON-ALIGNED INVESTIGATORS: 75%
   - GENIAL GLIDERS: 75%
   - SAVVY STANDOUTS: 79%

2. **I prioritize buying high quality food over other spending areas in my life (Total Agree)**
   - BEST INTENTIONS: 60%
   - ENGAGED EXCEL-ERATORS: 69%
   - IMPATIENT INVINCIBLES: 57%
   - NON-ALIGNED INVESTIGATORS: 54%
   - GENIAL GLIDERS: 47%
   - SAVVY STANDOUTS: 61%

3. **I'm trying to eat less meat in my overall diet (Total Agree)**
   - BEST INTENTIONS: 49%
   - ENGAGED EXCEL-ERATORS: 60%
   - IMPATIENT INVINCIBLES: 41%
   - NON-ALIGNED INVESTIGATORS: 39%
   - GENIAL GLIDERS: 37%
   - SAVVY STANDOUTS: 50%

Source: Kantar U.S. MONITOR 2020
Understanding the varying motivations and barriers of each segment can provide insight to engaging them.

![Graph showing the importance of overall wellbeing and looking fit and attractive across different segments.](Image)

Source: Kantar U.S. MONITOR 2020
Meeting consumers where they are to encourage healthy choices

**RYDE JANUARY CHALLENGE**

This Houston-based spin cycle company recognizes that people may be motivated to commit to working out with achievable goals and offer a variety of incentives: from straight-out cash, to discounts on fees for more rydes or cool gifts to share with others.

**SIMPLY GOOD JARS**

Ready-to-eat salads in a jar, these tasty meals are curated by a trained chef and served out of vending machine-style fridges popping up in gyms, malls and workplaces across the country. With great ingredients and convenient packaging, they provide an alternative to fast food options and make eating a healthy salad quick and easy.

KANTAR
Social / Emotional Wellbeing Dimensions

- Strength of relationships and connections
- Desire to find community
- Cultural connection and inclusivity
- Mental health and stress management
Mental health plays a significant role in one’s wellbeing – and is valued and cultivated differently by different segments.

The most important aspect of own wellbeing
Total US Pop: Physical health (42%), Mental health (41%), Spiritual health (18%)

- Best Intentions: 24%
  - Physical health: 24%
  - Mental health: 36%
  - Spiritual health: 41%

- Engaged Ex-celerators: 17%
  - Physical health: 35%
  - Mental health: 48%

- Impatient Invincibles: 16%
  - Physical health: 51%
  - Mental health: 33%

- Nonaligned Investigators: 19%
  - Physical health: 42%
  - Mental health: 40%

- Genial Gliders: 19%
  - Physical health: 36%
  - Mental health: 46%

- Savvy Standouts: 11%
  - Physical health: 43%
  - Mental health: 46%

- Your physical health
- Your mental health
- Your spiritual health
Managing stress is harder for some than others

Whether feel are managing stress in life effectively: No I am not

Source: Kantar U.S. MONITOR 2020
Relationships and community or lack thereof factor into one’s wellbeing

Faith: Having firm religious beliefs: extremely / very important personal value

Since COVID-19 started, I am feeling MORE Isolated (More/Less/The Same)

Source: Kantar U.S. MONITOR 2020; Kantar U.S. MONITOR August 2020 Recontact
Meeting consumers where they are to address their social and emotional health

**REMRISE**
A new brand that is reimagining sleep supplements with a holistic, personalized spin. The plant-based formulas are offered as a subscription, and are enhanced with an assortment of digital tools: an online educational platform, a meditation app, a sleep diary tracking tool that connect to devices like Fitbit.

**OHIO STATE WELLNESS**
The Ohio State University Wexner Medical Center is offering guided imagery and meditation practices to help patients prepare for surgery, ease stress, or even for dealing with grief and loss. The guided imagery is free and a downloadable mp3 file on their website, makes it accessible for anyone.
Financial Wellbeing Dimensions

- Wealth indicators
- Fiscal discipline
- Financial confidence
- Retirement preparedness
The WellBEINGS have varying financial profiles and concerns

Feeling In Control Of Your Financial Situation: Extremely/Very Important to Overall Wellbeing

<table>
<thead>
<tr>
<th>Group</th>
<th>Feeling In Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEST INTENTIONS</td>
<td>82%</td>
</tr>
<tr>
<td>ENGAGED EXCEL-ERATORS</td>
<td>87%</td>
</tr>
<tr>
<td>IMPATIENT INVINCIBLES</td>
<td>82%</td>
</tr>
<tr>
<td>NON-ALIGNED INVESTIGATORS</td>
<td>80%</td>
</tr>
<tr>
<td>GENIAL GLIDERS</td>
<td>82%</td>
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<tr>
<td>SAVVY STANDOUTS</td>
<td>85%</td>
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</tbody>
</table>

I live paycheck to paycheck

<table>
<thead>
<tr>
<th>Group</th>
<th>Paycheck to Paycheck</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEST INTENTIONS</td>
<td>54%</td>
</tr>
<tr>
<td>ENGAGED EXCEL-ERATORS</td>
<td>31%</td>
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<tr>
<td>IMPATIENT INVINCIBLES</td>
<td>59%</td>
</tr>
<tr>
<td>NON-ALIGNED INVESTIGATORS</td>
<td>52%</td>
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<tr>
<td>GENIAL GLIDERS</td>
<td>39%</td>
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<tr>
<td>SAVVY STANDOUTS</td>
<td>28%</td>
</tr>
</tbody>
</table>

Source: Kantar U.S. MONITOR 2020; Kantar U.S. MONITOR June 2020
Day-to-day money management varies across the segments

<table>
<thead>
<tr>
<th>Segment</th>
<th>I do not have as much discipline as I would like when it comes to how I spend money (Total Agree)</th>
<th>I pay the full balance on my credit card by the due date: (among those who currently have a credit card)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEST INTENTIONS</td>
<td>37%</td>
<td>49%</td>
</tr>
<tr>
<td>ENGAGED EXCEL-ERATORS</td>
<td>26%</td>
<td>65%</td>
</tr>
<tr>
<td>IMPATIENT INVINCIBLES</td>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>NON-ALIGNED INVESTIGATORS</td>
<td>29%</td>
<td>50%</td>
</tr>
<tr>
<td>GENIAL GLIDERS</td>
<td>30%</td>
<td>64%</td>
</tr>
<tr>
<td>SAVVY STANDOUTS</td>
<td>41%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Source: Kantar U.S. MONITOR 2020; Kantar U.S. MONITOR June 2020
Some consumers struggle with knowing what to do for better financial wellbeing; whereas others struggle with how to do it.

Having enough money to retire on:
Very / fairly worried:
- BEST INTENTIONS: 47%
- ENGAGED EXCEL-ERATORS: 42%
- IMPATIENT INVINCIBLES: 53%
- NON-ALIGNED INVESTIGATORS: 52%
- GENIAL GLIDERS: 37%
- SAVVY STANDOUTS: 40%

I know where I stand in terms of being financially prepared for retirement (Total Agree):
- BEST INTENTIONS: 70%
- ENGAGED EXCEL-ERATORS: 76%
- IMPATIENT INVINCIBLES: 59%
- NON-ALIGNED INVESTIGATORS: 58%
- GENIAL GLIDERS: 76%
- SAVVY STANDOUTS: 72%

I feel overwhelmed by the number of different ways I can invest my money (Total agree):
- BEST INTENTIONS: 44%
- ENGAGED EXCEL-ERATORS: 42%
- IMPATIENT INVINCIBLES: 51%
- NON-ALIGNED INVESTIGATORS: 50%
- GENIAL GLIDERS: 38%
- SAVVY STANDOUTS: 44%

Source: Kantar U.S. MONITOR 2020
There are lots of ways to offer financial solutions for key segments

EVERSAFE

EverSafe is a financial protection service aimed at less tech-savvy aging users. EverSafe monitors financial accounts and sends an alert to members when it detects unusual activity. EverSafe offers 24/7 phone assistance, and lets members designate advocates to also receive alerts, allowing a caretaker or family member to monitor their loved one’s security and intervene as necessary.

HSBC FINANCIAL WELLNESS CENTER

HSBC has partnered with Everfi to create a series of modules on a variety of topics, including Savings, Credit Cards & Credit Scores, Financing Higher Education, Renting vs. Owning, Taxes and Insurance, to provide the tools to better manage one’s financial future. Additionally, HSBC has created the YourMoneyCounts financial wellness program offered to the community in a classroom setting.
WellBEINGS’ application in the primary care space
We are here to guide, support, and advocate for our patients’ health. Every day.
Kantar’s Well-BEINGS + Claims data + Consumer profiles
BEST INTENTIONS

ENGAGED EXCEL-ERATORS

IMPATIENT INVINCIBLES

NONALIGNED INVESTIGATORS

GENIAL GLIDERS

SAVVY STANDOUTS

Spokane segmentation percentages

4% 2% 13% 36% 33% 12%
## Milestone preventive care

<table>
<thead>
<tr>
<th>Future Needs</th>
<th>Impending Needs</th>
<th>Immediate Needs</th>
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## Claims-based trigger communications

<table>
<thead>
<tr>
<th>ER/Urgent Care Utilization</th>
<th>Chronic Conditions Support</th>
<th>Life Events</th>
</tr>
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## Content outreach

<table>
<thead>
<tr>
<th>Social media targeting</th>
<th>Segment outreach via employers</th>
<th>Lifestyle / condition educational tools &amp; engagements</th>
</tr>
</thead>
</table>
1. Spokane

2. Washington

3. Vivacity Care Center
So should we stay in our own lane?
The value-add of a multi-dimensional approach to wellbeing

SPROUTT

Sprout Insurance views financial health as just the start: it uses data and AI to reward life insurance customers who live healthy lifestyles. Sprout strives to celebrate life in rewarding people for being active, sleeping well or living balanced, community-supported lives. Aiming to recognize good, life-extending behaviors as a preventative way to reduce spending later in life—from doctor’s visits to endless prescriptions—Sprout is pushing the boundaries of what “life insurance” could mean, making it at once proactive and celebratory.

ZAVFIT

ZavFit is an emerging tech start-up that has built the first health tool for money that focuses on improving the health and happiness of the individual as an outcome. Offering a financial fitness assessment of your wellbeing and where satisfaction comes from (your work, hobbies, friends as well as your volunteering and spending), it offers insights on goal setting and tracking for overall enhanced wellbeing.
Getting Started
For more information on The WellBEINGS, please contact:

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Colleen.sharp@kantar.com
Wellbeing & Me

Kantar’s Foresight Co-Lab – July 2021

The way that people think about and pursue wellbeing is evolving quickly and brands need to better understand where consumers are now… and anticipate what will come next.

With this in mind, Kantar is convening the Wellbeing & Me Co-Lab for professionals working in insight, foresight, strategy & innovation.

Sponsors of the Co-Lab will receive:

**An onboarding call and an initial set of insights** about the changing wellbeing landscape, mined from MONITOR.

**A Co-Lab roundtable** with peers from other world-class organizations. Hosted by J. Walker Smith and Don Abraham, this virtual event will give sponsors the chance to debate the future and learn from each other.

**The Wellbeing & Me research report** describing how wellbeing will evolve and where opportunities will lie for brands in coming years.

**A private 60-minute briefing** for each sponsor organization led by members of Kantar’s foresight and innovation team.

Please contact your account manager or reach out to us directly to learn more.

**Don Abraham**
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**Chris Carbone**
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"Health and wellness is no longer just a category or sector. It is a benefit that consumers want from every product and service…This is the opportunity for brands moving forward—to give people the ability to be more involved in their own health. Certainly, this applies to those in the health and wellness space, but this is also about brands in every sector of the marketplace."

J. Walker Smith
Knowledge Lead, Consulting Division
Looking Beyond Health & Wellness

THANK YOU!