

THE FUTURE OF WELLBEING

Two monumental challenges, laden with opportunity, impacting the health and happiness of consumers around the world.

In 2019, wellness penetrates every corner of the consumer landscape. Our friends at the Global Wellness Institute estimate the value of the global wellness economy to have hit \$4.2 trillion in 2017, growing nearly twice as fast as overall economic growth from 2015 to 2017.

And yet instead of wellness, in this report, we've opted to focus on wellbeing.

This report isn't dedicated to Insta-wellness: wellness as a status symbol, wellness for the wealthy, or spaces **where one fad replaces the last**. From gravity boots to Goop, wellness has come a long way. But it hasn't truly solved our problems. On a treadmill of its own invention, the wellness market has humankind sweating, but without getting from A to B. So for now, put down that CBD mocktail, climb off the Peloton and wipe the charcoal-activated moisturizer off your face!

There are tougher-than-Tough-Mudder issues out there that threaten the wellbeing of billions of consumers. When it comes to thinking about The Future of Wellbeing, we've chosen to instead explore the biggest threats to the happiness and health of humans in the coming years and even decades from today - and the opportunities they present for you. The trends below impact consumers of all backgrounds, of all interests, of all age groups. And there are ramifications for every industry.

No quick fixes. No miracle cures.

Clients of our **Premium service** receive exclusive access to the full report, diving into all five trends - THE BURNOUT, AIR TIME, BANK OF ME, THE COMING OF AGE, and THE MALE COMPLEX - along with supporting materials. In this free version, we focus on two of those themes with a

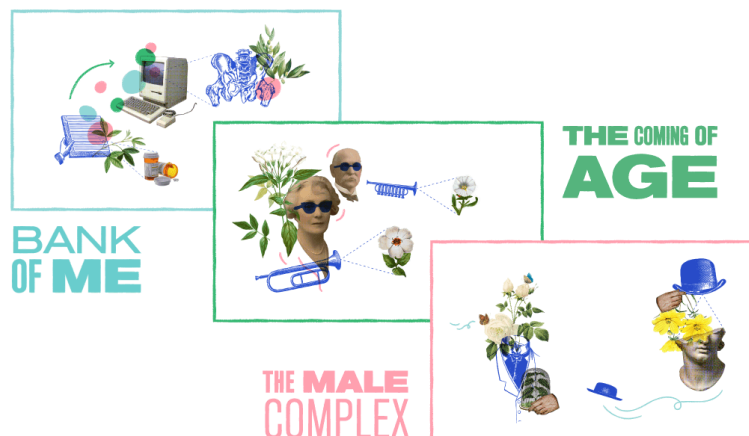
snapshot of the global innovators who already rolling out solutions, and ideas on how you can make a difference.

The health and happiness of billions of people is at stake. It's hard to find a more compelling motive than that. Together, let's take the grit that drives us to go for a run at sunrise, the resolve that unlocks personal bests on down days, the focus that lets us meditate on a packed subway, and apply them to these epic challenges.

The Prognosis.

1. THE BURNOUT: Often mistaken as a Millennial condition, burnout is no small matter. Millions of consumers from all backgrounds have burnt through their mental and physical reserves. It's an epidemic and brands must join the fight.

2. AIR TIME: Until recently most people thought air pollution was a problem that had largely been solved, especially in affluent societies. It's now clear that our air is anything but clear. Air pollution remains an omnipresent threat to health and happiness around the world. Alarmed consumers will demand reduction, prevention, and protection.



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1. THE BURNOUT

Brands rush to treat those burnt by the pressures of modern life.

Modern life is scorched by two phenomena: overconsumption and a celebration of overdoing it. Consumers grow more impatient by the day, primed by the escalation of the on-demand economy (Amazon installed same-day delivery lockers at [Coachella](#) FFS). They want it all, for less, right now.

Expectations derived from this unforgiving economy have trickled down to workers. **Workplaces celebrate employees who are on-demand themselves: ready to 'deliver' at any and every moment.** This is especially true in cultures known for a religious-like zeal for work, leading to drastic measures. Japan set a legal limit on working overtime to 45 hours per month. South Korea's government now shuts off employee computers to prevent overwork.

In May, the [World Health Organization](#) added occupational burnout to its International Classification of Diseases.

To make matters worse, when (if) people put work aside, they spend an average of 2 hours and 16 minutes each day on social platforms. Scrolling and swiping through streams of content that normalize the perfectly fit, the 23-year-old entrepreneur, having fun all the time while zipping through their bucket list.

The pressure to 'live your best life' is omnichannel.

Consumers' efforts to be on fire all the time - personally and professionally - are causing many to burn through their mental and physical reserves. Amid a growing focus on wellbeing and an epidemic of exhaustion, individuals and employers are finally confronting their demanding lifestyles and unrealistic personal standards. This shift has compelled brands all over the world to wage a battle against burnout.

WHY NOW

THE BURNOUT BADGE

Entrepreneurship porn glorifies the #hustle and makes slowing down shameful. CEOs, like Jack Ma and Elon Musk, wear burnout as a badge of honor. To Ma, working 996 (9 am to 9 pm, 6 days per week) is "bliss";

according to Musk, nobody “changed the world on 40 hours a week.”

THE BURN UNIT

Knowledge of burnout’s medical consequences (including diabetes, high cholesterol and death for people under 45) is rising among consumers (PLoS One). Plus, burnout is becoming too expensive to ignore: it accounts for USD 125-190 billion in healthcare costs yearly (HBR), a figure set to rise.

SELF-CARE STRESS

The above helped spur a thriving ‘self-care’ sector, now worth USD 11 billion (HBR). Bombarded with wellness innovations – and peers proclaiming how ‘well’ they are on social – consumers feel inadequate and can’t escape their burnout. Yes, awareness is key, but constant awareness exacerbates the problem.

Examples



SHAKE SHACK – Fast food chain is the latest to trial four-day work week
No shame if reducing the working week by an entire day is too extreme for your brand! How else could you show your staff you take burnout seriously?
US-based fast food chain **Shake Shack** announced in March 2019 that it was trialing a four-day work week for some of its employees. Designed to help its recruitment and retention efforts, Shake Shack's program applies to managers working at restaurants in Las Vegas, Los Angeles, Dallas, San Antonio and Detroit. The trial comes after a report by a New Zealand-based insurance firm, Perpetual Guardian, which found that its four-day work week trial improved its employees' productivity by 20% and work-life balance by 24%.

THE DAWN – Retreat offers burnout rehab for executives
That this program is choosing to go brain-cell-level-deep with its participants demonstrates how severe burnout can be.
A Thailand-based rehab and wellness center, **The Dawn**, launched a therapeutic retreat for burnt-out executives in Q2 2019. The program is designed to help overworked executives cope with and prevent workplace stress. Participants undergo a psychological evaluation and are involved in activities such as personal training, meditation, yoga, one-on-one and group therapy, trauma release sessions and transcranial magnetic stimulation treatments. The cost of the two-week program is USD 6,000.

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WHAT NEXT

WORK: REWORKED

Not-so-fun fact: 48% of employees in the US alone have cried at work (Ginger). With work stress often the main cause, the workplace (your own and your customers') is a key setting for burnout-battling innovations. See how, for example, the four-day workweek is gaining traction.

LAB RATS

When it comes to reducing burnout, there are plenty of temporary fixes available; a meditation session is soothing, CBD relaxes the body. But is there a way you can help your customer (or employee) do a deeper analysis, and get to the bottom of their burnout? Thriva's cortisol kit, for instance, helps users figure out when their stress peaks. See the 2019 trend **LAB RATS** for more ideas.

WHAT'S BEST FOR THE MOST-STRESSED

To misquote Tolstoy: Happy consumers are all alike; every burnt out consumer is burnt out in their own way. Burnout impacts a diverse array of people (see the following spread) and it is caused by many different factors. Unique individuals require unique solutions. Avoid prescriptive platitudes and consider a highly targeted approach.

THE WORLD ON FIRE

Just a few examples of who your brand might be able to rescue from THE BURNOUT.



Due to burnout, the US will be short an estimated 90,000 physicians in 2025, thereby spurring a public health crisis (Harvard Global Health Institute, 2019).



One in three college freshmen globally have mental disorder symptoms, and 20% say they have contemplated suicide (WHO, September 2018).



33% of parents reported extreme frustration with parenting, 25% said they were exhausted daily (BPI Network, June 2018).



YouTubers are subject to ruthless competition for views and an algorithm favoring frequent posters. Creators who've spoken about burnout include Elle Mills, El Rubius and Alisha Marie.



Burnout has become a worsening occupational hazard for teachers. Over 9 in 10 elementary school teachers in the US are highly stressed (University of Missouri, April 2018)



Citing high turnover, tight margins, high-pressure accounts and long hours, 32% of ad agency professionals reported being worried about their mental health (Digiday+, February 2019).



Due to 1-2 day shipping guarantees, pilots flying for Amazon went on strike because of overwork. Over 60% say they are looking for work at UPS and FedEx (APA, April 2019).

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2. AIR TIME

Time to get deadly serious about air quality.

In 2019, the discerning shopper that picks an item off the shelf and spins it around to check the ingredients is no outlier. They are bang in the middle of the bell curve in every category and they are hyper-conscious of health and sustainability. Incredibly, demand for organic food ([Nielsen](#)), clean beauty ([Vogue](#)), and natural textiles ([Lyst](#)) continues to rise. In spite of this heightened policing of what they put in or on their bodies, there is one threat to their wellbeing they cannot avoid.

They can't escape the air that surrounds them.

That might sound like a tagline from an 80s horror/thriller but – spoiler alert – this shit is deadly.

Urbanization and industrialization - two of the largest macro shifts of the last century - continue to improve life for billions of people on vital measures, from education to employment. Yet they've come with a hefty price - the scourge of air pollution - which impacts the wellbeing of all living people.

Awareness has been raised by the proliferation of affordable sensors, which alert users to invisible threats; a mountainous body of research with alarming headlines ([Cooking Sunday roast causes indoor pollution 'worse than Delhi'](#)); and unignorable toxic clouds that hang over cities.

Alarmed and impatient, consumers will demand governments and brands react with reduction, prevention, and protection.

WHY NOW

OMNIPRESENT DANGER

Air quality is a global issue. It reaches every region and touches every industry. It impacts people wherever they are. Out in the streets or in their homes. From restaurants to hospitals. From theme parks to [office parks](#). Even the 1% can't escape it, though it hits low-income communities the hardest ([UN](#)).



9 out of 10 people worldwide breath polluted air (WHO, May 2018).

POST-INDUSTRIAL THREAT

Air pollution is associated with heavy industry. However, in 2019, 'modern', service sector economies lie under deadly shrouds. Seoul is enacting **emergency measures**, residents in a London housing estate were **instructed not to open their windows!**

VISIBLE & INSUFFERABLE

Cheap sensors mean citizens can track and share hyper-local air quality data, more easily than ever before. This largely invisible threat is being brought to light. Consumers (who were able to overlook this problem during rampant economic growth) are concerned and seeking answers. Especially as new **research** finds it may impact 'every organ in the body'.

Examples

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SAMSUNG – Robotic air purifier senses, then moves to, dirtiest area
Let's be clear, this is an adorable-looking solution to an

IKEA – Air purifying curtain destroys pollutants
Brands like Ikea, with global reach and accessible pricing will rapidly take this trend from premium to mass

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ugly problem.

South Korea-based Samsung debuted the **Samsung Bot Air**, a robotic air purifier, in February 2019 at the Kitchen and Bath Industry Show in Las Vegas. Using sensors that are located throughout the home, the bot can assess indoor air quality and move directly to the area most in need of purifying. The device uses lighting to show real-time improvement in air quality, red for bad quality and green for fresh air. Pricing and availability have yet to be announced.

February 2019 saw Ikea announce the development of the Gunrid air purifying curtain, designed to reduce indoor air pollutants. Prompted by reports that indoor air pollution accounts for more deaths than outdoor pollution, Ikea created curtains that destroy toxins found primarily inside, such as formaldehyde. The curtains are treated with minerals that break down pollutants when light shines on them, via a process similar to photosynthesis. Ikea's version of this technology is the first to be activated by indoor light. The Gunrid curtains will go on sale in 2020.

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WHAT NEXT

CLEAN AIR ACTS

Not all hope is lost. When nations collaborate, we can turn it around! One example? The UN found, thanks to international collaboration in the 1980s, the ozone is recovering. Defiant city governments are also rolling out ambitious policies. Brands can lobby for and propose new schemes.

NEW STANDARDS

The promise of 'filtered air' will leap from luxury to basic amenity. Every time an establishment like **Stella McCartney**'s flagship promises the 'cleanest air in London', it raises the bar for all businesses. Air quality is set to become a competitive benchmark. Will you play catch up or lead the way?

PREVENTION & PROTECTION

Step one, industries must shift to less harmful production processes and tout their successes. At the same time, this issue won't be fixed in the next decade. Your customers will face a growing need for air filters, air masks and other safeguards. Dongkook Pharmaceutical, saw sales of its protective masks surpass its total volume for 2018 in the first two months of 2019 (**Asia Times**).

Your Prescription

Phew! You may feel a little alarmed if you read all this in one go. But alongside the alarm you should feel inspired to act.

Bold innovators around the world are already working to overcome these obstacles to human wellbeing. In doing so, they are changing what your customers will expect from you in the coming months and years. It's now up to you to take stock of those expectations, and with your team, consider how you can beat them.

With your help, a world of better balanced lifestyles and cleaner air is possible. If you're still unsure of how to begin, keep reading...

Access (Un)denied

Both of the trends above and the additional trends in the full report share a unique truth, and it's an ugly one. In most cases, lower income people are at the greatest risk.

Yes, air pollution is a threat to all living people, even Goop readers, yet the UN reports it hurts the poorest the most. A seven figure salary doesn't insulate people from burnout, but when someone's hourly wage feeds a household, the stakes are higher. We could go on, but you get the point!

You know by now that consumers want to spend money and time with the brands that have a lasting, positive impact on society. So one approach to work with the above trends is to ask: who is hit the hardest and how can we make the solutions more accessible?

Good Luck!!!



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ABOUT THE AUTHOR:

Reinier

IT TAKES A TEAM

This Trend Briefing has many hands on it. A huge thanks to the team that pulled this together with such positivity and enthusiasm, especially: Vicky Kim and Nikki Ritmeijer (for design!), and also David Mattin, Vicki Loomes, Henry Mason, Alida Urban, Harry Metzger, Harvey Gomez, Jareth Ashbrook, Jonathan Herbst and Lisa Feierstein, Livia Fioretti and Rosie Toumanian. THANK YOU!

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