



10 trends

Health and wellbeing



Overview

The composition of the population - in terms of the health and wellbeing of its members - is one of 15 dimensions that we use to examine trends in UK consumers and society. Here we outline ten key trends in this area, from our larger trend bank, which will create both opportunities and risks to many organisations.

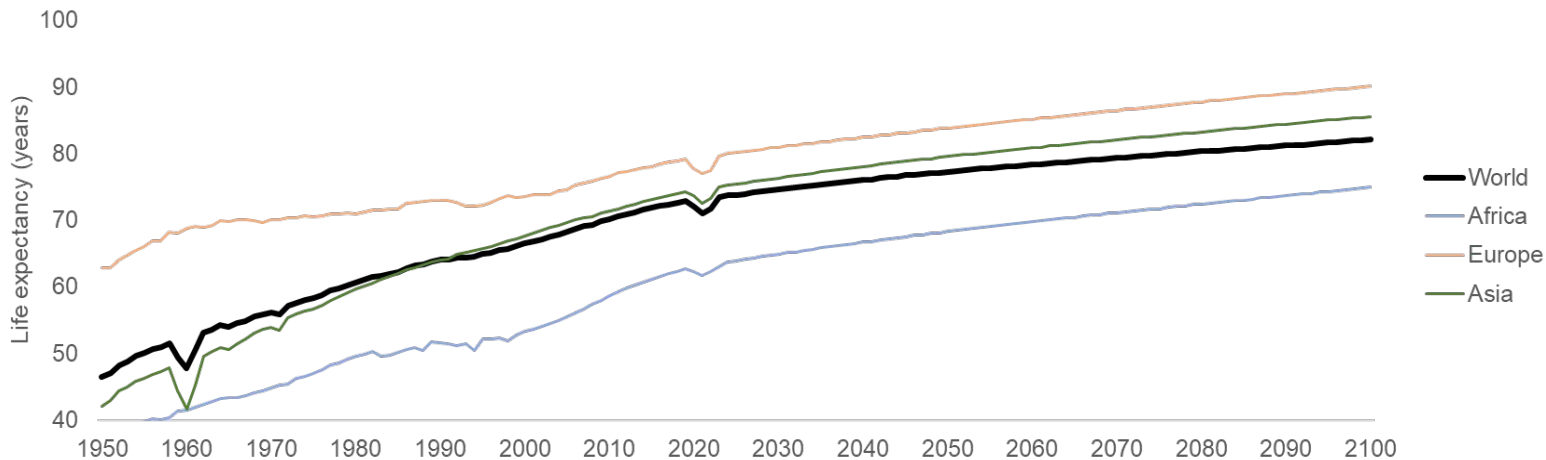
“COVID” and the state of the NHS have been dominating health discussions for the past few years, while there has been a strong rise in the awareness and understanding of mental health. However, our aging population is gradually creating a range of new challenges while poverty is driving health inequalities. At the same time that such forces are acting to challenge the long-term improvement we have seen in life expectancy and health, new technology is providing a possible pathway out of crisis.



Global context

The world's life expectancy increased from 60 to 73 between 1978 and now. Daily-adjusted life years, which measures the burden of disease through the loss of the equivalent of one year of full health, reduced by 50% since 2000. While inequalities remain, investments in innovation and R&D continue rising across the healthcare value chain: Twice the number of drug designs were in the R&D pipeline in 2021 c.f. 2011.

Life expectancy trends and projection (UN)



10 UK trends



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Time unwell

01



Photo by Centre for Ageing Better on Unsplash

About: Between 1960 and 2020, life expectancy in the UK improved from 70 to 80, but the number of years living in good health has not kept pace, meaning more of the population spend their later years in poor health and/or with disabilities: In 2020, men and women live around 16 and 19 years in poor health respectively (Kings Fund).

Responses: 40% of NHS budget is spent on over 65s. As the NHS model struggles with the aging and rising population, new social and healthcare services for the older generation have emerged; the need for which is exasperated by staff shortfalls and declining profitability that have challenged the care home market. Age-friendly innovations have ranged from flexible pensions and equity release schemes (to support independent living), through to various tech-applications such as AI for disease detection (e.g. CognoSpeak), monitoring of seniors by health professionals (e.g. MySense, Howz) and aids for sensory decline (e.g. GiveVision) .

Future business opportunities & challenges: More sectors of the economy will be called on to assist with helping maintain the wellbeing of our growing senior population, transcending those that provide product, services and solutions directly. For instance, banks and insurers can continue striving to provide suitable flexible products, while employers can be more supportive of employees working part time for longer in life.

Cancer aware

02



Photo by Centre for Ageing Better on Unsplash

About: Cancer incidents have increased by 12% from the early 1990s (Cancer Research UK) We are become more ‘cancer aware’ but from a low base: Between 2009-15, people visiting their GP with potential cancer risks, within 3 months of finding symptoms, increased by 50% (British Journal of General Practice). However, only c1% of adults can identify the symptoms of liver cancer, and 2% and 3% spot symptoms of oesophageal and stomach cancer (Less Survivable Cancers Taskforce).

Responses: Cancer Research UK and the NHS have campaigned to increase cancer awareness over several years, generating a modest progress in the recognition of symptoms and risk factors based on their ongoing tracker surveys.

Future business opportunities & challenges: Workplace health and wellbeing service provider Health Assured write: “Cancer often comes with a stigma in the workplace. Employers can break this stigma by addressing health concerns like cancer directly.” With growing numbers affected directly or indirectly, organisations will be drive to become more supportive of those affected. Moreover, this will transcend cancer.

A different NHS

03



Photo by Jack Lucas Smith on Unsplash

About: The NHS has reached crisis point: Waiting lists grew from just over 4m in 2019 to 7.2m in April 2023. A recent workforce plan found the NHS already has 154,000 fewer full-time staff than it needs, and that number could reach 571,000 by 2036.

Responses: The UK is turning to private and innovative solutions. Agencies like Grand View Research have predicted a 6.5% CAGR in the private health insurance market to 2030, whereupon it will be worth c£350bn. Because of the non coverage of existing conditions by some legacy providers, newer insurers like Best Health are offering alternative products that meet this need, while others are offering some levels of coverage even if not complete. A new breed of telemedicine service provider (e.g. Immedicare) is also meeting unmet needs.

Future business opportunities & challenges: Health- and social-care are both sectors rife for new entrants and innovators over coming years. Despite Government pledges to support the NHS, high immigration rates and the growth of older population segment will continue stretching the NHS. Employers will likely be challenged to continue to expand their private health benefits for staff to remain competitive.

Obesity and poverty

04



Photo by Joana Godinho on Unsplash

About: Only 7% feel that they are "very healthy", and only 5% of women and 6% who are 25+. 45% are somewhat or very unhealthy, or don't know (YouGov). Obesity rates increased from 13.2% in 1993 to 28.7% in 2019 in England (Health Survey for England)

Responses: The food industry has sought to adapt over time, using portion control, reformulation techniques, labelling and by providing healthy alternatives. Unfortunately, such products remain adopted more by those already healthy, or *less unhealthy*. Those more likely to be obese often additionally suffer from psychological conditions like the avoidance of emotions and poor body image, which remain barriers to improvement.

Future business opportunities & challenges: The fitness and wellness industry has been urged to increase accessibility by a range of media, in response to the obesity epidemic in the UK and US. Online fitness clubs and classes were boosted by COVID, but now face the challenge to sustain momentum and appeal. The combination of wearable devices, apps, new services, and innovations in low cost healthier food options are all needed from future organisations across the diet and fitness industries.

Mind health matters

05



Photo by Simon Watkinson on Unsplash

About: The number of people in contact with NHS mental health services in England grew from 1.3m (2010/11) to 2m (2018/19) and was 3.2m in 2021/22 (NHS Digital). Anxiety levels, which peaked in COVID, are declining but remain above the baseline from 2013-18. 6% of the UK live with mental health issues, including 4m of the 15m (30%) who have broader long term conditions. Social stigmas are eroding, that said, with 83% of the UK believing it acceptable to discuss mental health in 2021 (BACP, 2021).

Responses: Organisations are responding in numerous ways: for instance, the CIPD found a strong correlation between poor managers and mental health issues, motivating recommendations for retraining. Providers of training and consultancy services are now common (e.g. Joyful Living, PAM Wellbeing, and Make UK).

Future business opportunities & challenges: While COVID raised the importance of mental health with employers, the CIPD reported some practices had started to slip in their 2022 'Health & Wellbeing at Work' survey. In an ever evolving landscape, employers face the challenge of embedding and maintaining the latest best practice and making use of the latest research and innovations regarding, for example, optimal working patterns, flexible working processes, computer use and work-life integration.

Anxious childhoods

06



Photo by Katie Gerrard on Unsplash

About: Children's unhappiness continues to decline. 1 in 9 children aged 10 to 15 have low wellbeing and 1 in 8 are unhappy at school: Meanwhile, "average happiness with life as a whole, friends, appearance and school were all significantly lower in 2019-20 than when the survey started in 2009-10." (Children's Society).

Responses: Access to basic essentials like reasonable standards of heating, food and housing are coinciding with the unhealthy impact of social media and a decline in stable families. Organisations in sectors that are responsible for basic service provision have been responding with schemes to help in the face of increasing pressure e.g. National Energy Action (NEA) is a national charity that tackles fuel poverty.

Future business opportunities & challenges: Unless the current crisis is reversed, businesses will face increasing challenges related to the mental wellbeing of their future workforces. Businesses will also face increasing social pressures to drive the affordability of their products, particularly in markets providing essential products and services

HealthCo Inc

07



Photo by NordWood Themes on Unsplash

About: Investment company Beauhurst reported that: “Healthtech investments broke records in the first three quarters of 2022 across the USA, EU and UK, reaching values of \$23b. In the UK, investment has grown from £345m in 2016 to £3.13b in 2021, growing nearly 800%”

Responses: The digital technology revolution was given a boost by COVID, whereupon 28m people acquired the NHS app. Notable new entrants (and their funding) include Cera who provide in-situ services to pensioners (£364m), Huma who provide a digital hospital from home (£311m) and DnaNudge (£67m) which offers a wearable device that provides the wearer assistance with choosing healthier diets.

Future business opportunities & challenges: The UK has been termed “the Silicon Valley of eHealth”, creating a fertile ground for new innovation. The sector is relatively well supported by Government funded R&D aligned to a health and social care policy paper published in 2022. In 2021, London was heralded as the top hub for healthcare investments in the world when it broke the £1bn barrier.

The robot doctor

08



Photo by Possessed Photography on Unsplash

About: Globally, AI and robotics have already started to transform healthcare. The NHS already use AI for analysing X-ray images, mammograms, supporting people in “virtual wards” to free up hospital beds and to carry out background data analysis to improve treatments. Robots have been used in the NHS since the American-built DaVinci robot was deployed in St Mary’s Hospital in 2001.

Responses: To date, robots have not been deemed cost effective for the NHS, but new evaluation criteria is changing the situation (Health Economics Unit). A growing number of UK companies are establishing medical-robot product ranges, such as Storm Lab UK, HCA and CMR Surgical, which is amongst the world’s best funded startups.

Future business opportunities & challenges: Technological and industry disruption provides opportunities for startups to take advantage of new opportunities, for existing companies to diversify (e.g. analytics companies could move into predictive analytics for treatments), as well as many ancillary businesses (e.g. data security).

The sleep market

09



Photo by Alexander Grey on Unsplash

About: c1 in 2 (49%) don't believe they get enough sleep (YouGov) and 1 in 3 struggle to sleep more than once a week (Dreams). People in the UK get about 6.8hrs sleep a night, which is below the recommended 8hrs (Sleep Council). One study estimated that a lack of sleep costs the UK 2% of its GDP (Hafner et al, 2017)

Responses: Innovations include smart beds, which monitor peoples' sleep patterns and make adjustments to optimise comfort, cooling technology and light therapy (e.g. EightSleep). The global sleep aid market has already been valued at \$59bn in 2020 (Allied Market Research)

Future business opportunities & challenges: Innovation in "sleep" behaviour is expected follow a similar future trajectory as that in smoking, drinking, diet and exercise. Funding will increase across UK research centres e.g. The Sleep Research Centre at Surrey University. As awareness grows, a new market could emerge for yet more products and services, including counselling, supplements, apps, and stimulants.

Weaning off

10



Photo by Dave George on Unsplash


About: The UK is gradually reducing the use of illegal drugs, smoking less and drinking less. 12% had taken an illegal drug in 2002, but this fell to 9% in 2021. Class A drug use fell from 3.3% to 2.7% in the same time. The percentage smoking fell from c25% to 11%. About 20% of the population now don't drink at all.

Responses: Companies selling alcohol or tobacco products have been forced to not only adapt their marketing but bring out new products e.g. Heat-no-burn, vaping, or smokeless products like snuff. Other companies have brought out nicotine replacement products (NRTs). NGOs and charities have formed or repositioned to tackle these different issues, such as Alcohol Change UK or Action on Addiction.

Future business opportunities & challenges: Old tobacco and alcohol companies will need to continue to diversify and innovate in light of declining legacy markets e.g. tobacco-free oral nicotine pouches that are made from plant fibres. Alcohol companies are also having to adapt products with new entrants providing sub-categories like “wellness wines” and sustainable beer.

Factors affecting the future

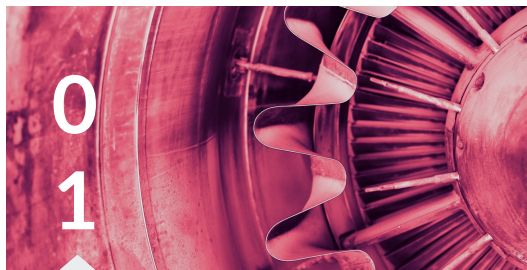




Perspectives on the future: Emmanuel Fombu, The Future of Healthcare: Humans and Machines Partnering for Better Outcomes

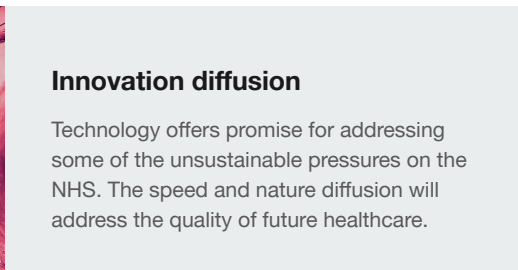
“It takes the average person four years of doctors' visits to spend as much time with their physician as they spend with their phone in a single day.”

Key factors affecting the future UK trajectory



Cycles of poverty & ill health

Poor mental & physical health, poverty drug- and alcohol misuse are correlated. Health outcomes for the poorest will depend on political and social responses to poverty.



Innovation diffusion

Technology offers promise for addressing some of the unsustainable pressures on the NHS. The speed and nature diffusion will address the quality of future healthcare.

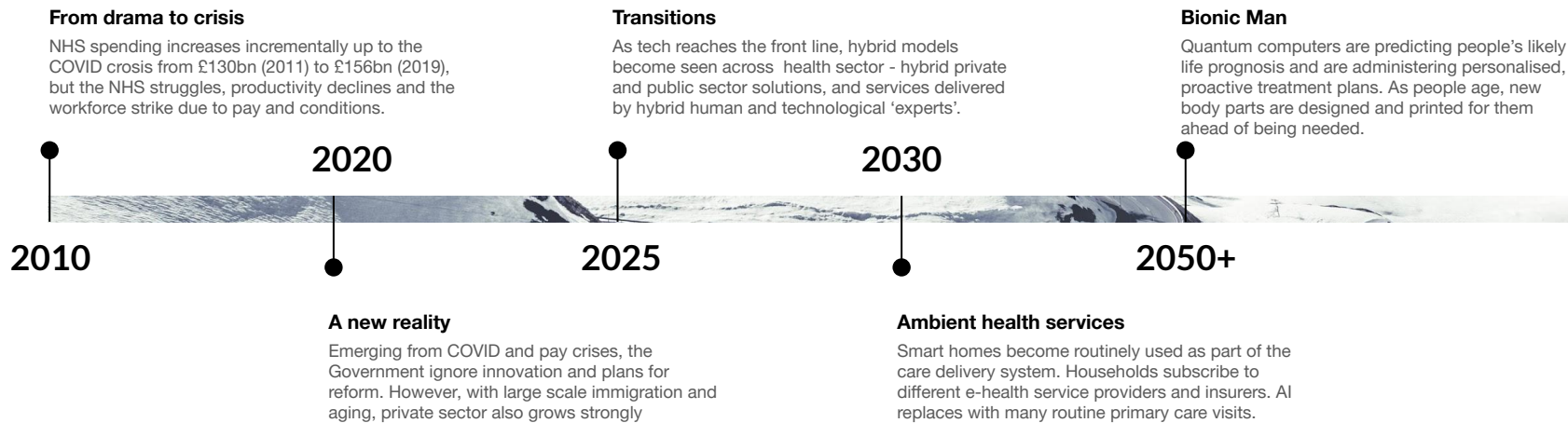



Individual agency

Attitudes toward personal responsibility, self-education and decision-making will be instrumental to shaping outcomes for individuals, as public services struggle

Timeline

Example scenario based on successful innovation diffusion





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