

21

TIMES

HEALTH

A Wunderman Thompson POV on
Health, Pharma & Wellness



ABOUT

THE

PROJECT

Today, there is no real doubt in anyone's mind that the COVID-19 pandemic will go down as one of the most significant health, social and economic crises before the world in general, and India, in particular.

As we inch towards the end of the lockdown, many categories will find themselves stepping into the new normal. Studies show that 21 days is the minimum time required to change a habit. With the extended lockdown, the Indian consumer has got more time than that! And with a strong emotional and economic motive to boot!

For many categories, the day the lockdown lifts will be 'Day 1' in many ways. 21 Times Health is a look at some trends that can help us get ready for that day.



OUR

APPROACH

There are various inputs that have found their way into this project. Various COVID-19 reports compiled by different Wunderman Thompson offices around the world, reports by research agencies like Kantar, experts' POVs, articles from various publications, studies on global financial crisis in 2008 and so on.

Additionally, we conducted a lockdown study among 100 Indian households to capture their changing mindsets and behaviors around health. We also spoke to various brand and field experts to corroborate the findings.

At the end of all this, here we are, with the 21 ways in which consumers are re-looking at health, hygiene, pharma, wellness and other aligned compartments of their life.



THE TRENDS

01	The War On Germs	05
02	Building Immunity	09
03	Rethinking Vaccinations	15
04	Alternative Medicine	21
05	Hard Health	25
06	All Eyes On Hygiene	29
07	Buying Health Online	33
08	Mental Health	37
09	Health Fashion	41
10	Home-Made In India	45

11	Indoor Fitness	49
12	Monitor That	53
13	Rise Of Cold & Flu	57
14	Insuring Health	61
15	Expanding Medicine Box	65
16	Health At Work	69
17	Deep-Clean	73
18	Health Tech	77
19	Sedentary Ailments	81
20	Health Lines	87
21	Health Heroes	91



01

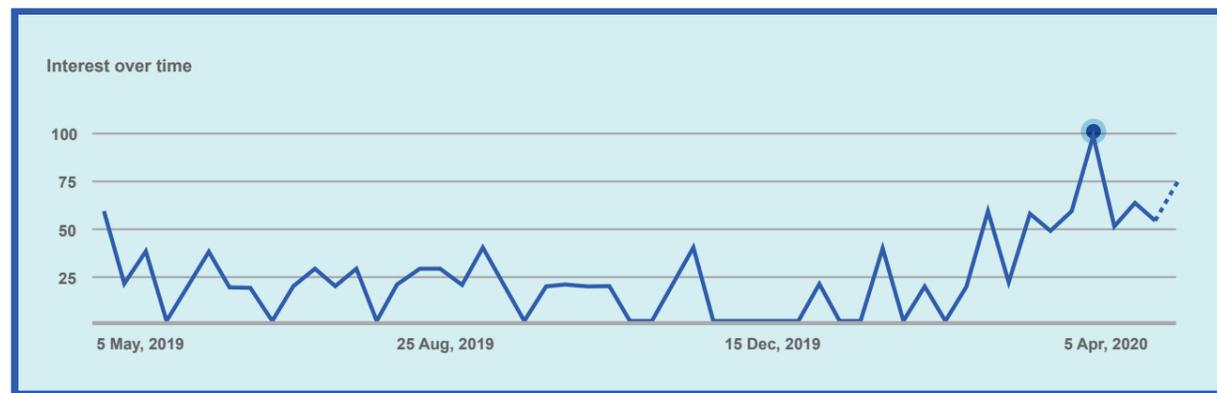
THE WAR

ON GERMS

In a 2015 TED Talk, **Bill Gates** said, **“Today, the greatest risk of global catastrophe doesn't look like a nuclear war. If anything kills over 10 million people in the next few decades, it's most likely to be a highly infectious virus rather than a war. Not missiles, but microbes.”**

Today, with evidence to back it up, it's not surprising that we are looking at **germs as our ‘Enemy Number One’**.

Google Trends captures this interest in germs and germ-kill. Similarly, searches around ‘Bacteria kill’ in India grew by over 3X in February-March 2020. ‘Antiseptic’ as a search term showed the highest spike in March 2020 as compared to results over last 12 months. Clearly, there is a very real sense of vulnerability vis-à-vis germs.



“

Zydu Wellness sensed this need for expert germ care and advanced its sanitizer launch. Like **Tarun Arora, CEO, Zydu Wellness**, told us: **“I believe the brands offering germ-kill and hygiene will continue to be relevant even after COVID-19 is gone. As the concern for health and safety grows, consumers are increasingly looking at trusted brands for solutions. Our consumer work had shown that Nycil was a good fit within this space and hence, we advanced our plans to launch our sanitizer by a year.”**

The Kantar COVID-19 Barometer study in April 2020 corroborates this, when it states that: Personal cleaning products like soaps, handwashes, sanitizers had a 56% net increase in purchases. Products like antiseptic liquids, anti-bacterial liquids and wipes had a 51% net increase in purchases.



What is interesting is that, while it started as a localized war on germs, largely restricted to sanitizers, anti-bac soaps, handwashes, toilet or floor cleaners, we are moving to a blanket zero-tolerance policy towards germs. For instance, Marico launched its fruit & vegetable-cleaning product ‘Veggie Clean’, to remove germs, bacteria and other contaminants.

In The WUNDERMAN THOMPSON (WT) LOCKDOWN STUDY:

86%	said that if a floor cleaner / kitchen cleaner came with a better anti-bacterial benefit, they would purchase it.
85%	said that if a detergent came with an anti-bacterial benefit, they would purchase it.
63%	felt that more people will now consider buying an air purifier / AC with air purifying action to counter airborne germs.

This is in line with a Nielsen study on shifting Chinese consumer attitudes, which found that 90% and 93% of the respondents have already purchased or plan to buy air purifiers and water purifiers, respectively. So, watch out germs, the war is on!



WHAT MAKES THIS RELEVANT

Even as we are cocooned in our homes during lockdown, we're ‘seeing’ germs everywhere. As we step into life after lockdown, our paranoia is only going to increase. We will look at lift buttons and elevators and start seeing germs. We will sit in shared taxis and wonder who sat there before us. We will continue to keep our groceries and veggies in the sun for a bit, hoping that will kill the germs. We will look at schools and offices and see germ hangouts. Then, when we come back home, we will want products that destroy the germs that we may have collected on our way back, before they come inside with us.

With this blanket intolerance for germs catching on, it is more than likely that the next breakthrough for many-a-category could come from cracking the right germ-kill or anti-bac formulation or narrative.



02

BUILDING

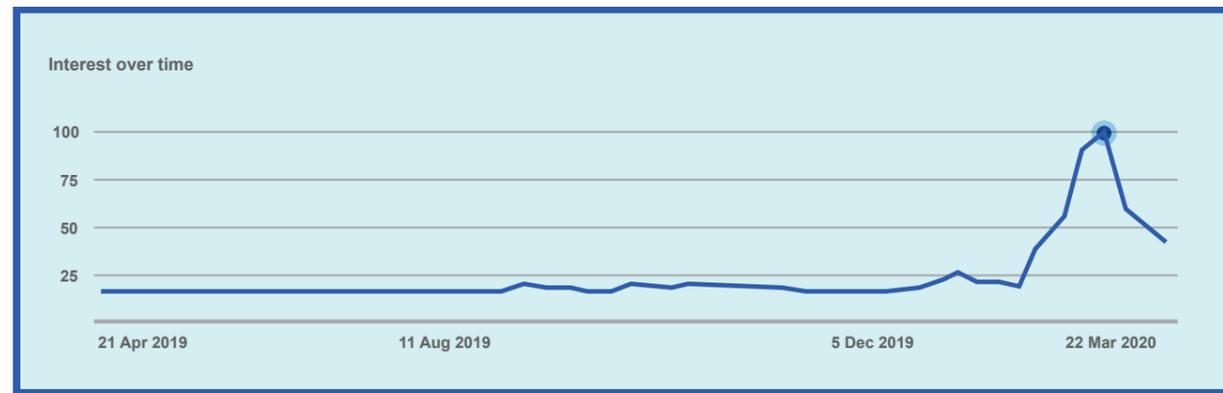
IMMUNITY

COVID-19 has turned the outside environment into a minefield and this feeling of everything and everyone we come in contact with, being a potential threat, is likely to remain a part of our lives for some time. **With the external environment becoming unsafe and unpredictable, people are looking to combat the external threat by becoming strong from within and building their immunity levels.**

Like former CSIR scientist **AKS Rawat** quoted in BusinessLine: **“The idea is that if you don’t have a potent weapon to combat the enemy, a strong and effective shield is the best bet to protect yourself.”**

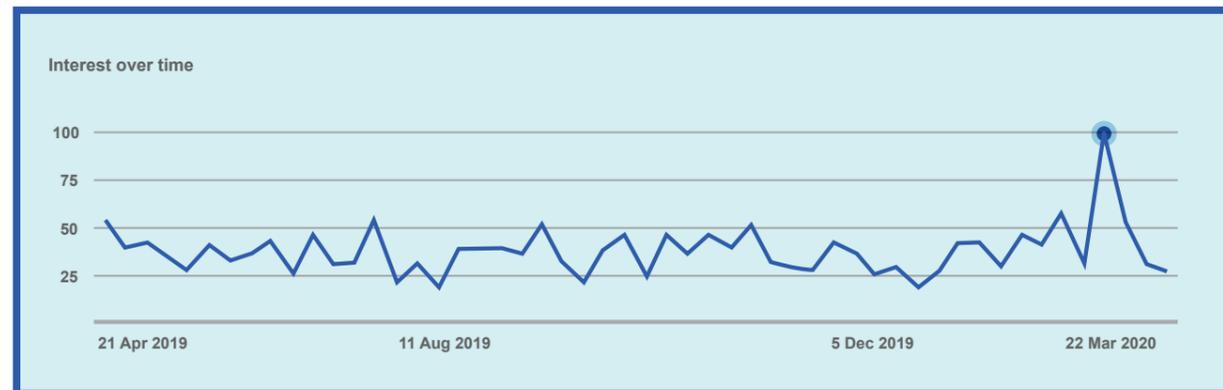
Google Trends corroborates this:

In March 2020, the search for ‘Immune system’ showed the maximum spike as compared to results over the last 12 months.

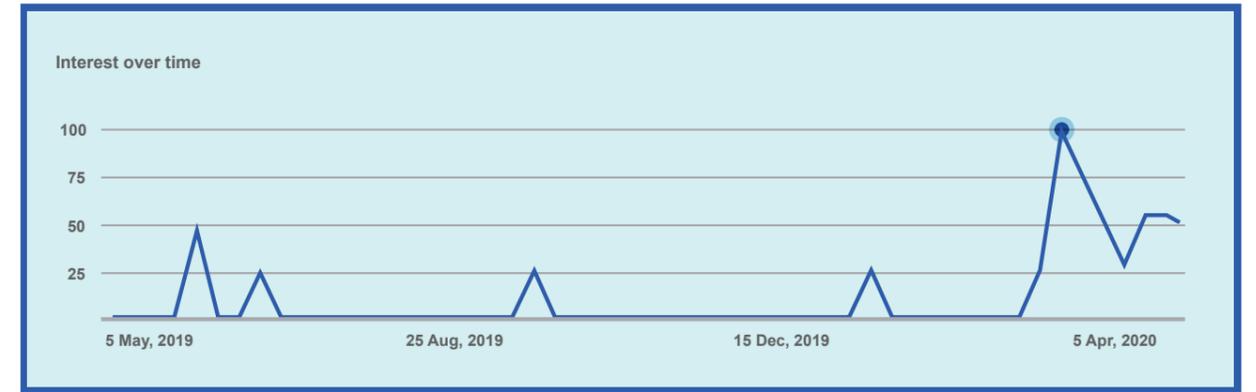


● Immune System

‘Health drinks’ as a search term showed the highest spike in March 2020 as compared to results over the last 12 months, as did ‘immunity recipes’.



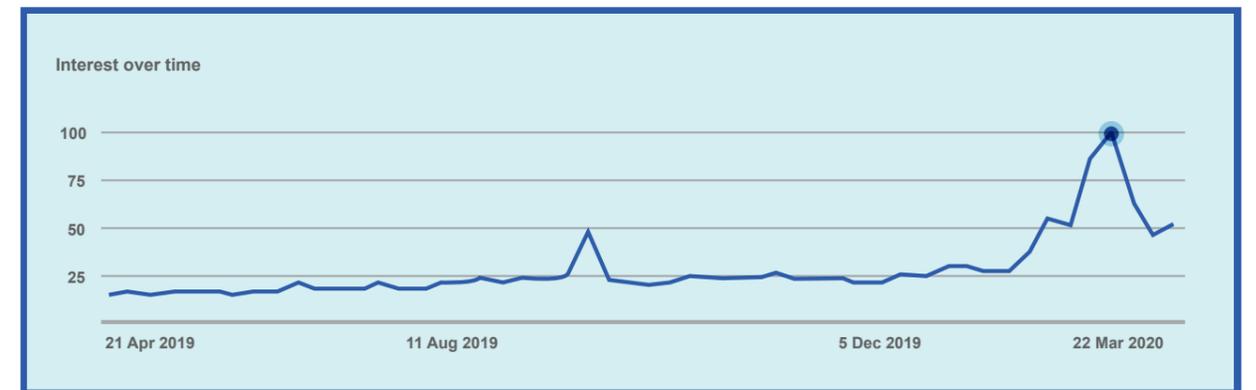
● Health Drinks



● Immunity Recipes



Searches for ‘Vitamin C’, which is commonly associated with immunity, more than doubled between Feb 2020 and March 2020.



● Vitamin C

“

Sriram Padmanabhan, Associate Marketing Director, Adult Nutrition portfolio at Abbott, believes that the search for immunity is driven by the need for prevention: **“Online searches, WhatsApp forwards and news content are all pointing to this need for individuals to know more about how to protect themselves. The adage that ‘I am immortal’ has been significantly weakened with COVID-19 showing no distinction between class, creed or religion. There will be a structural shift on taking care of one’s health from a curative lens to preventative.”**

”

Nielsen data in an Economic Times article corroborates this:

It shows that immunity booster sales in modern trade surged in March 2020, compared to the preceding quarter - Chyawanprash by 81% from 2%, branded packaged honey by 35% against 10%, and turmeric by 38% from 7%.

The WT LOCKDOWN STUDY shows that while the need for immunity is universal, many roads lead to it:



Like Sujit, a start-up founder told us: **“In a way, we’re back to Darwin’s ‘Survival Of The Fittest!’”**



WHAT MAKES THIS RELEVANT

Before COVID-19 made its appearance on our combined timelines, urban Indians were used to pushing their health to the backburners. Everyone knew that turmeric was good, chyawanprash was good, multivitamins could go a long way in plugging deficiencies and making our armours whole again, a walk in the sun was all it took to get the sunshine vitamin. But all these solutions and more got delegated to a distant tomorrow, while we hurtled on to meet our busy schedules.

Today, we are keenly aware of having a whole backlog of deficiencies and we are looking for every window to catch up on immunity. Every food-item we ingest, every nutraceutical we buy, every vegetable and concoction that kids turned their noses up at, now stands a chance as an immunity builder.



03

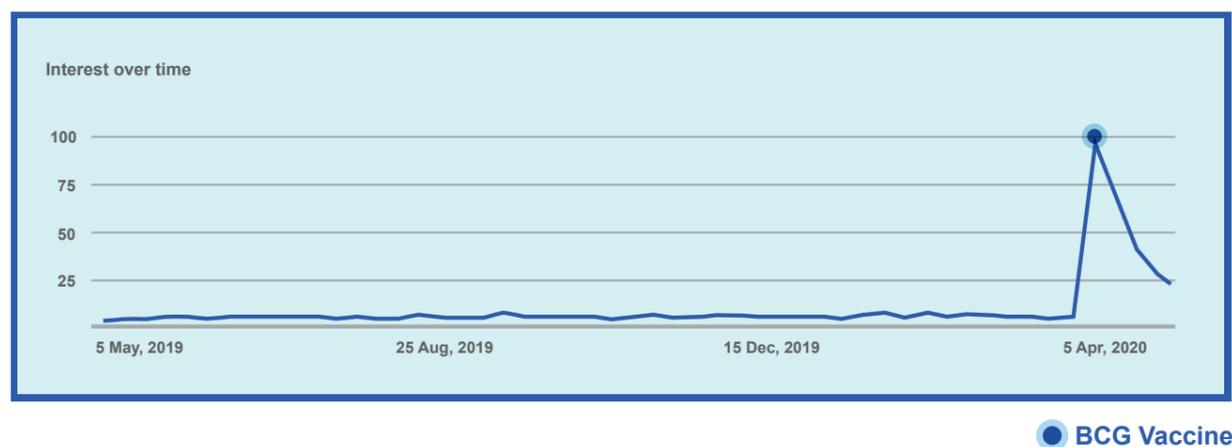
RETHINKING

VACCINATIONS

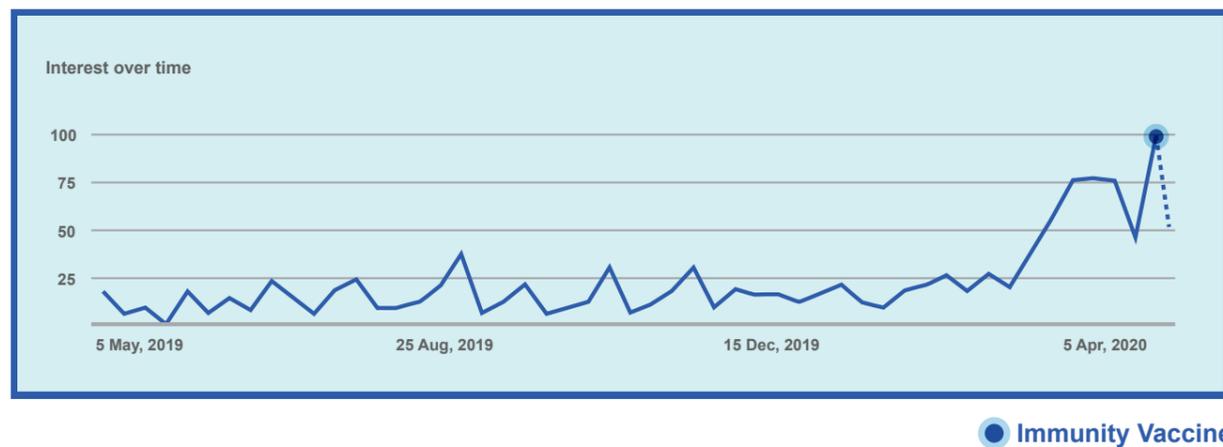
Currently, India, like the rest of the world, is dealing with the challenge of how to meet children's vaccination schedules in these lockdown and high-infection-risk conditions. This anxiety shows in the surge in searches for 'vaccine due'. Already, experts are worried that delayed vaccination schedules can cause some preventable diseases to resurface.



However, along with this very real worry, there is also an overall change in attitudes to vaccination. COVID-19 put the spotlight on various vaccinations. The 100-year old BCG vaccine is credited with increasing India's natural immunity against COVID-19. This led to a spike in interest levels. Similarly, though people know fully well that a COVID-19 vaccine is nowhere near finalization, there was a surge of searches around 'immunity vaccines' in the last few months. It's almost like after a long stint in anonymity, vaccinations are coming forward in a far more active avatar.



● BCG Vaccine



● Immunity Vaccine

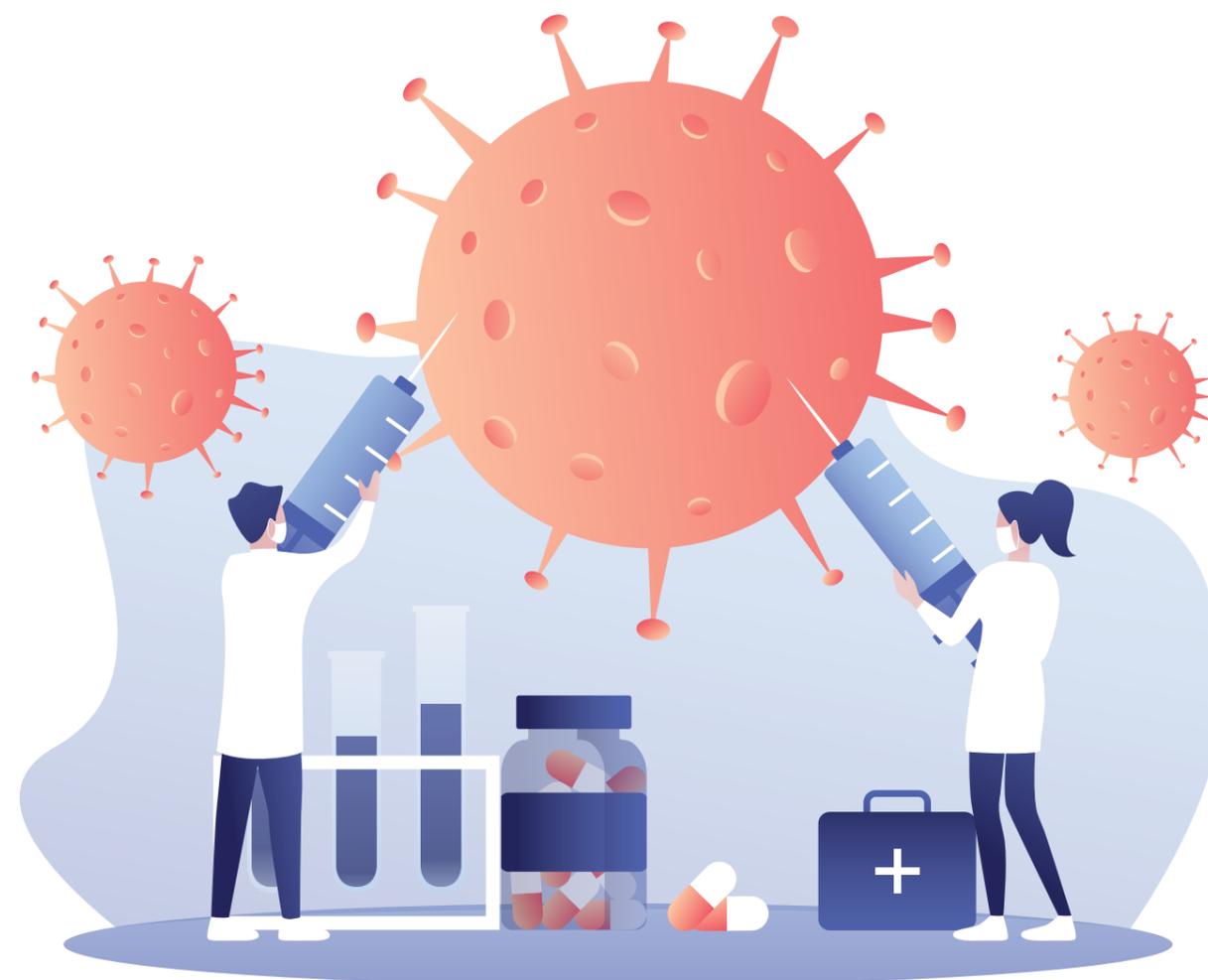
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Like **Mehul Parekh, President, Harmony Life Science**, says, **“Pharma companies will see vaccines as a big opportunity, not just for COVID-19, but for other flu bugs as well. People will also invest time and money to insure themselves and their families by getting vaccinated.”**

”

This positive predisposition to vaccination is echoing in other markets as well. As per a VCP poll on France24.com, where 1 in 3 did not view vaccines as safe in 2018, just 18% would refuse a COVID-19 vaccine now.

A Kantar China survey on the public opinion towards future vaccination decisions, found that as many as 94% were willing to receive a COVID-19 vaccine when launched - a big increase as compared to approximately 72% of the respondents who indicated that they had taken at least one influenza or pneumonia vaccine in the past 10 years.



In The WT LOCKDOWN STUDY, we found that:

73%

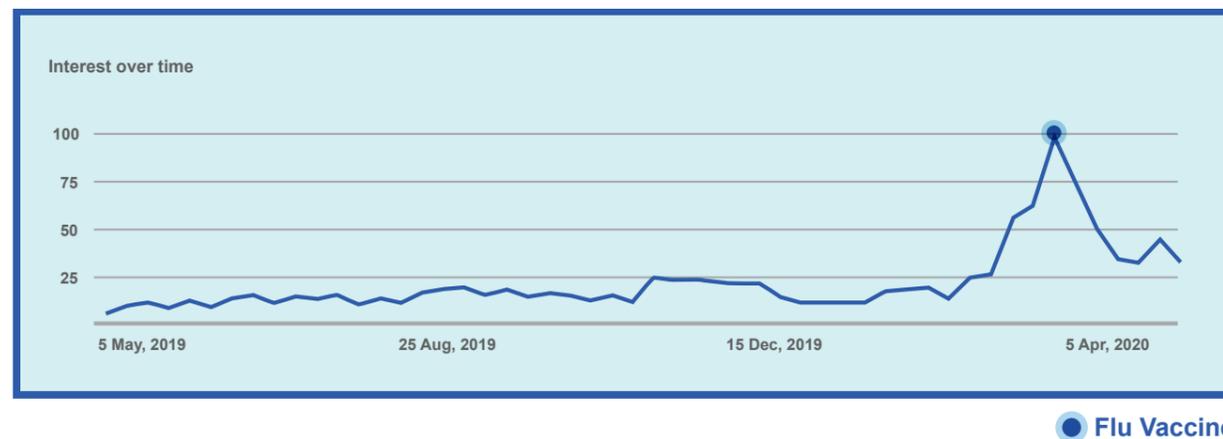
people would get themselves and their families inoculated within a month of a COVID-19 vaccine being developed.

73%

believe that people are now more likely to consider flu shots and some other vaccines, which are currently considered optional.



This is reflected in a spike in Google searches around 'flu vaccine'.



As per Meera, a young mom from Mumbai: **“Some vaccines are mandatory, but for the others, the doctors say it is up to us. But after reading about the good effects of the BCG, any mother will want to just give them all. Why take a chance?!”**

WHAT MAKES THIS RELEVANT

Vaccinations have always been the silent warrior. You trusted them to do their job, but once the schedule was met and the shot taken, you forgot about them. For many, they never played a role beyond the vaccination schedule. So when you got flu, you reached out for flu pills, not flu shots. Because of this limited relevance, even within the vaccination schedule, parents often chose the ‘star vaccines’ and opted out of the ‘voluntary vaccines’.

Now, for the first time, people are looking at vaccinations as possibly having an active role in building immunity. With this, perhaps, the number of ‘voluntary vaccinations’ will shrink as people adjust to a new ‘better safe than sorry’ mindset. And, perhaps, adult vaccinations, a thus-far neglected area, might just get a much-needed shot in the arm.



04

ALTERNATIVE

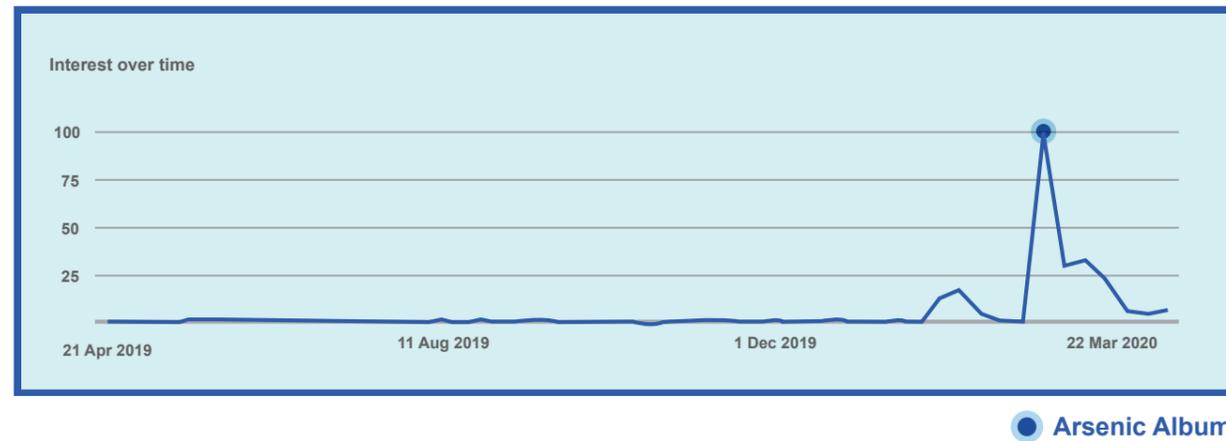
MEDICINE

Pre-COVID, Allopathy was largely established as the faster, more effective medicine. But with COVID-19 having no cure in sight, we are coming to terms with the fact that Allopathy hasn't yet learnt to treat everything. As a result, **people are turning to alternative streams of medicine like Homeopathy, Ayurveda, Unani and herbal products to find solutions.**

In The WT LOCKDOWN STUDY:

81% people agreed that there is some truth to the fact that Homeopathic and / or Ayurvedic medicines can build your immunity and make you stronger from within.

1 in 5 households said that they had increased usage of herbal teas to build immunity.

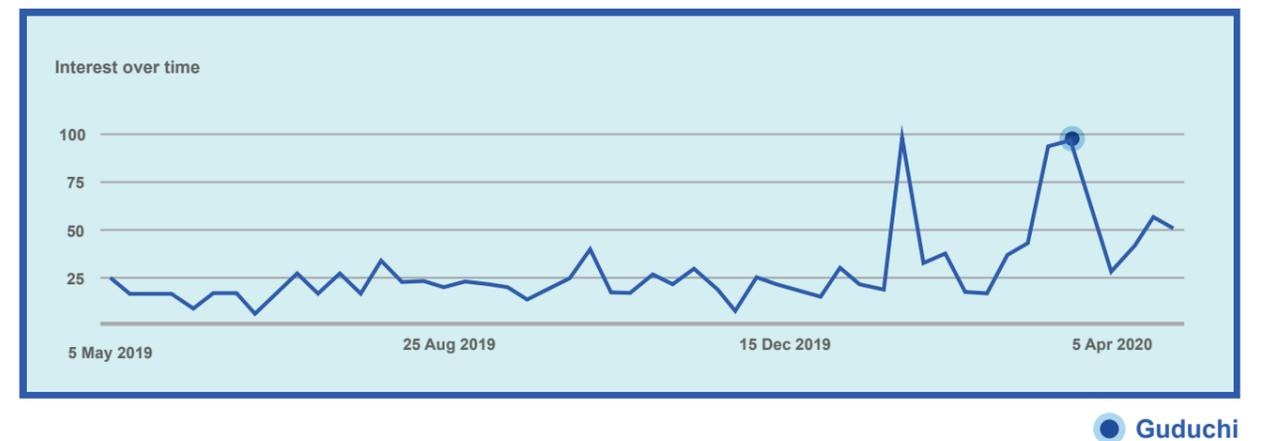


In January, after the Ministry of Ayush (Ayurveda, Yoga & Naturopathy, Unani, Siddha and Homoeopathy) issued an advisory recommending homeopathic pill Arsenicum Album 30 as a preventive measure against Coronavirus, Google searches spiked. As per an Indian Express article, 12 lakh people in Gujarat had bought Arsenicum Album 30 as of March.

Since the virus gained traction, **Dr Ancy Treesa, a Homeopathy practitioner** from Bangalore, has seen a surge in demand: **“My patient base has grown 20-30%, most of whom want immunity and preventive medicine. Since March, there has also been demand from companies who want to provide their employees with such medicines. Just yesterday, I received an order from a well-known local company for 400 employees.”**

Ayurveda is another big gainer. Searches for Guduchi, an Ayurvedic herb known to boost immunity, show unprecedented spikes. In April, Prime Minister Modi, in his address, asked people to drink Kadha, an Ayurvedic concoction made of spices, to help boost immunity. While most believe that a vaccine is the only long-term solution, there is a growing belief in the preventive powers of alternative medicine.

As per a TNN article : “With the prevailing common notion of people with good immunities having a lesser chance of infection, citizens are asking for immunity booster Ayurvedic tonics, tablets and naturopathy medicines from specialists.” This is universal. Chinese media reported a rise in traditional herbal remedies, while a BCG survey in the US in March showed a >15% increase in US consumer spends on preventive healthcare.



WHAT MAKES THIS RELEVANT

Over and above the revival of alternative medicines, will this be the revival of preventive medicine? So far, urban Indians have let their busy lifestyles lead them to a ‘Don’t mend it if it’s not broken’ mindset. The attitude has always been one to push action and lifestyle changes to tomorrow, or until one suffers a health breakdown.

The COVID-19 pandemic is bringing the realization that the surest way to beat illness is to prevent it. And while ‘cures’ might work on one-lane roads, preventive medicine works on multi-lane pathways. Will this change the foundational logic of categories ranging from nutraceuticals to Homeopathy clinics?

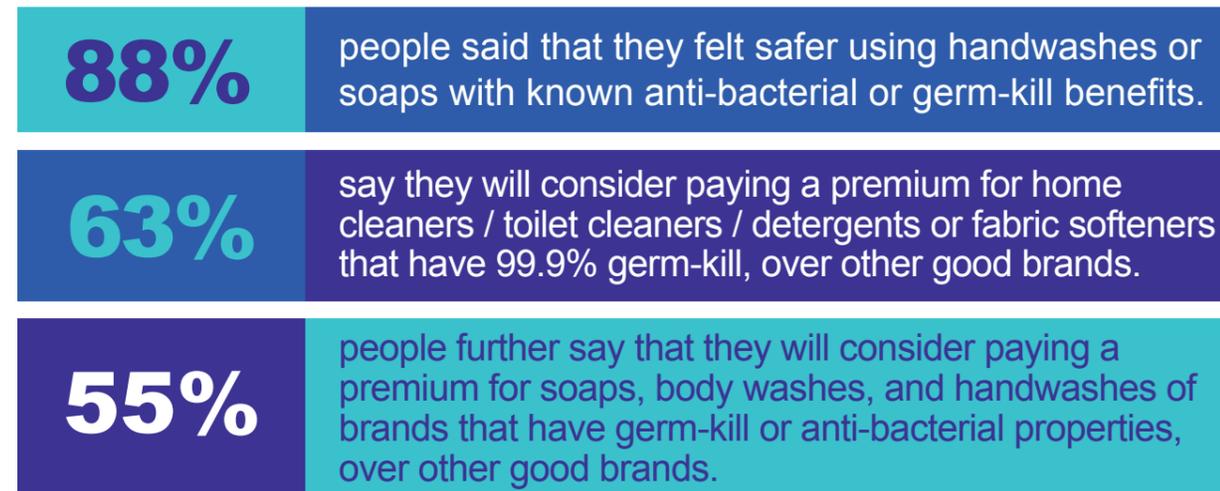


05

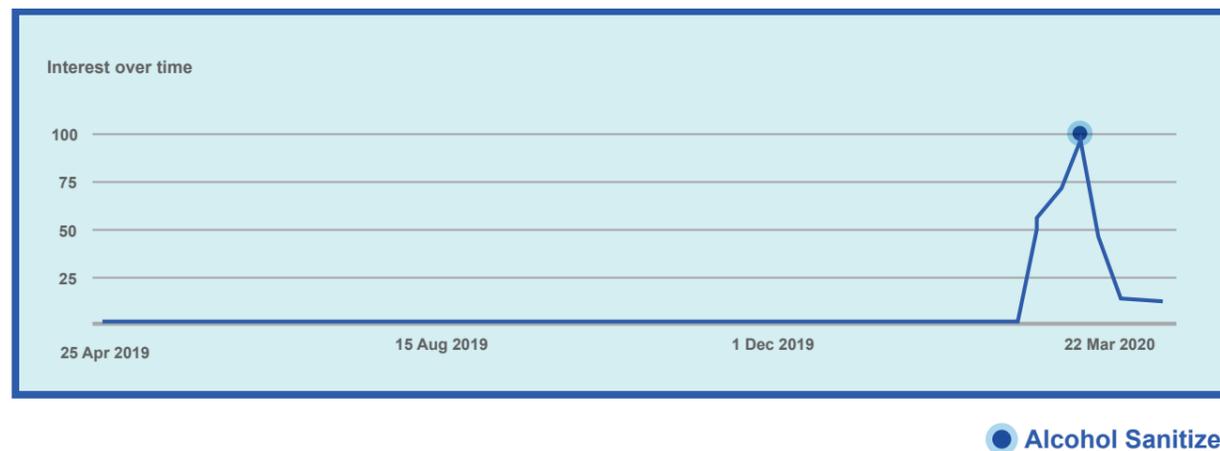
HARD

HEALTH

The WT LOCKDOWN STUDY threw up some interesting findings: In spite of the general rhetoric on how all soaps are equally effective against COVID-19,

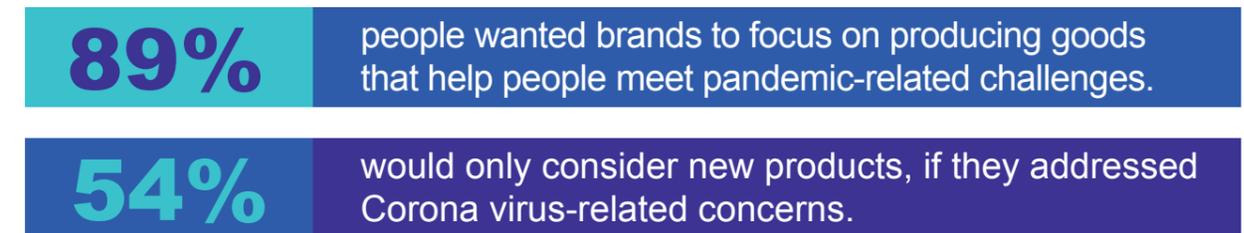


Clearly, with an increased threat to health, consumers are veering towards hard, clinical claims over softer narratives. This is not a time when they are going to worry about soft hands, if they are not 99.9% sure of no germs. Once a country that sparingly used sanitizers, Google India searches in March, show a sharp spike in the specific search: Alcohol sanitizers



This is in line with findings from other markets. As per Euromonitor, in China, disposable wipes in portable formats with 75% alcohol and virus kill, are in great and urgent demand. With these in short supply, consumers are turning to personal wipes positioned with germ-killing and anti-bacterial functionalities. Wechat Kantar Data shows that 76% of Chinese respondents will continue to pay attention to the bacteria-killing feature of personal care and household cleaning products even after the pandemic.

This move to hard health is not just about making better claims. The expectation is that there are better-working, authentic products behind the claim. This was captured in the 2020 Edelman Trust Barometer special report on brand trust and the Corona virus pandemic cited in HBS, which showed that:



Sustainability advocate and influencer, **Candice Batista** captures the paradigm shift the best, when she says: **I usually recommend natural or do-it-yourself products to clean, but we need to use what is the most effective in killing these viruses. I now use hydrogen peroxide products to disinfect.**



WHAT MAKES THIS RELEVANT

The move to hard health will make performance and efficacy the hero. People will look for products that work faster, give better relief, have a stronger formulation and carry a more real reassurance.

The move to authentic, hardworking products with hard health claims also has the power to create a new generation of challenger brands that can change established category dynamics with a 'cut the fluff and let the product talk' era. It would be interesting to see if players who enjoy health credentials will get easy acceptance in new categories where they don't have a history.

Finally, what would be interesting is to track how brands that have an all-out 'look good / feel good' equity will respond to stay relevant in an overwhelmingly 'do-good' market.



06

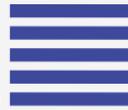
ALL

EYES

ON

HYGIENE

INDIA TODAY



No saliva, no handshakes, no selfies: India, South Africa gear up for ODI series

India Today ran this provocative article headline for the India-South Africa ODI scheduled in March.

One of the mandates considered was that bowlers should stop shining the ball with saliva. It's significant because it shows the sudden heightened consciousness around a ritual that was never hygienic, but was well-accepted nevertheless.

Whether it is avoiding handshakes, using personal hygiene products or home sanitization, **India is going through a new awareness about personal hygiene.** A News18 study showed that Coronavirus has made 87.2% Indians more concerned about personal hygiene. As per the Hindu BusinessLine, in the first half of March, retailers saw a spike of over 400-500% in the sales of personal hygiene products. For Grofers, personal hygiene as a category saw the biggest surge in March, including sanitizers by 400%, handwashes by 120%, soaps by 70%, followed by floor cleaners.

In fact, the overall hygiene consciousness has gone up so starkly that as per an ET report in April, the preliminary analysis by 'Jal Jan Jodo Abhiyan' showed the average water consumption per person was 75 litres before March 15 which had increased to 125 litres owing to repeated handwashing, home cleaning and washing of clothes.



A Kantar 'Consumer Reaction to COVID-19' survey found some exact behavior changes:

- 91.4% people were washing hands more often
- 46.9% were using toilet cleaners more often
- 40.9% were mopping floors more often
- 28% were using more disinfectants

While the hygiene motif is redefining category dynamics in personal care and household care products, its effect is likely to go far beyond. As per an ET report, hygiene is the biggest concern dragging down sales of online food delivery platforms.

The WT LOCKDOWN STUDY also shed some light on the behaviours that are changing because of hygiene concerns:

91%

said that they might not feel comfortable using Uber / Ola after the lockdown.

70%

people had stopped ordering food online, while another 25.6% said they had reduced order-ins.

76%

disinfected all parcels before opening them.

66%

had started using only digital payments.

46%

had not only used masks, but also used gloves when they went out.

WHAT MAKES THIS RELEVANT

Hygiene consciousness is likely to make lasting structural changes in behaviours at least until COVID-19 stays on the horizon, and this, in turn, can create opportunities in the B2C and B2B segments. In the B2C segments, many new categories like sanitizers have covered years' worth of education in a couple of months. It remains to be seen if brands can create triggers and regimens that sustain these new products and behaviours, even after the peak of the pandemic.

At a B2B level, there will be increasing demand for hygiene solutions from categories as varied as shared cab services, delivery platforms and nearly all rental categories. Tailor-made products and solutions might find a willing market.

The focus on government initiatives like Swachh Bharat Abhiyan will also increase, creating further platforms for brands to drive hygiene initiatives.



07

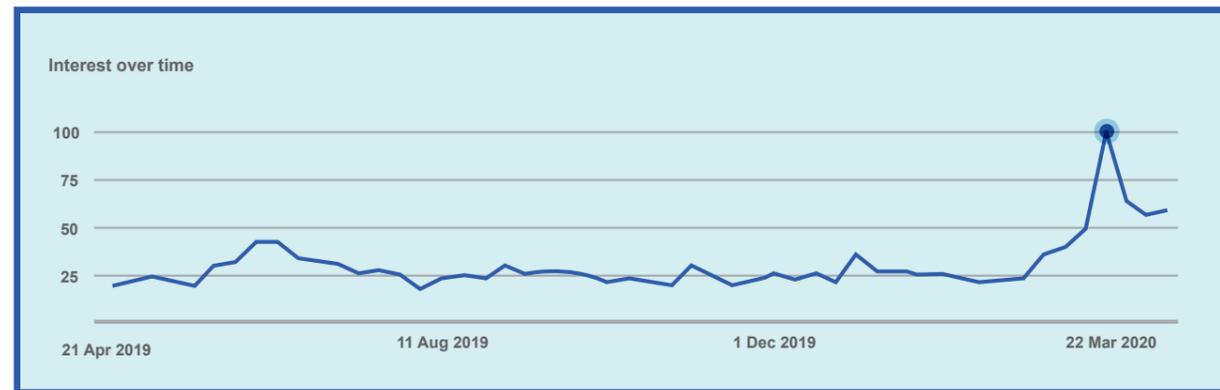
BUYING

HEALTH

ONLINE

In India, pharmacies have always been more than just a shop, but a trusted channel. After the doctor - and in some cases, in lieu of doctors - the chemist wielded the power to influence purchase decisions. **In the lockdown, pharmacies were open as part of essentials, but consumers became more wary of stepping out and this has resulted in an increase in digital health purchases.** The WT LOCKDOWN STUDY showed that 1 in 3 people had bought medicines online at least once, in the past few months.

In many cases, this is their first purchase. The Kantar COVID-19 Barometer study found that 26% people said they had bought OTC pharmaceutical products online for the first time. The obvious beneficiaries are the e-pharmacies. Google searches show that 'Online pharmacy' as a search term has shown the highest spike in March 2020 as compared to results studied over last 12 months.



● Online Pharmacy

As per an Economic Times report, this is backed by consumer behaviour at nearly every leading e-pharmacy.

PharmEasy has found that demand for overall medicines category has gone up by almost 100%. MedLife has seen an up-to 200% upsurge in the number of orders coming in. 1MG is experiencing a three to four-times increase in demand for hand sanitizers, masks, and immunity boosters. This does not mean people will completely migrate to digital.

The WT LOCKDOWN STUDY found signs of a mix and match:

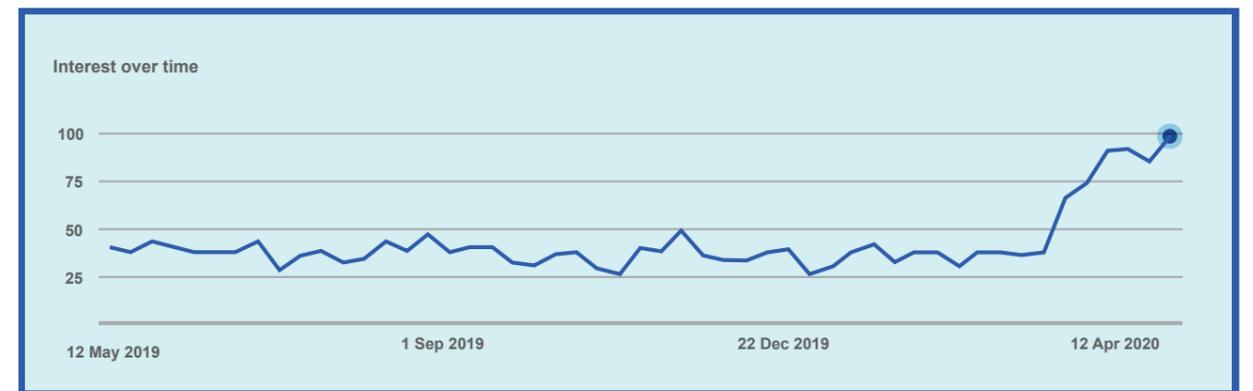
8.9% said that they would move exclusively to buying medicines online.

1 in 3 said that they may buy basic medicines online, but continue buying from pharmacies when there is a doctor prescription.



Sriram Padmanabhan of Abbott gives an interesting perspective: **“E-pharmacies should not just consider themselves as suppliers who can deliver at an efficient cost conveniently. This is a great time to think both demand and supply. How can they upstream themselves and connect doctors & patients and complete the loop with the product supply? E-pharmacies should transition themselves from a marketplace into an omnipresent platform.”**

This carries weight because the search for online consultation has also gone up. Nearly 1 in 3 people in our study said that they would consider consulting an online doctor for smaller ailments, even after lockdown. This reflects in the surge in Google searches. An ET report quotes **Dr. Kuruvilla of Practo** as saying that **“queries regarding fever, cough, cold, sore throat etc. have increased by 200%, and also that there is almost a 50% increase in the number of doctors joining Practo.”**



● Online Doctor

WHAT MAKES THIS RELEVANT

As COVID-19 creates opportunities for people to compare offline and online pharmacies, the future is likely to be phygital. E-pharmacies that offer a retail leg or wellness chains that add a digital leg - anyone who can get into an omnichannel format that matches the convenience, range and discounts of online with the reassurance and human touch of offline, might have the advantage.

The other interesting development to track would be the future of telemedicine. As doctor clinics become a red zone in people's heads, will we see a fundamental shift in the role of the 'family doctor' who got consulted at the drop of a hat? If that happens, will brands and categories that depend on the HCP channel to fuel footfalls, find themselves replicating an HCP channel online? Or will more doctors cross the bridge and become digital?



08

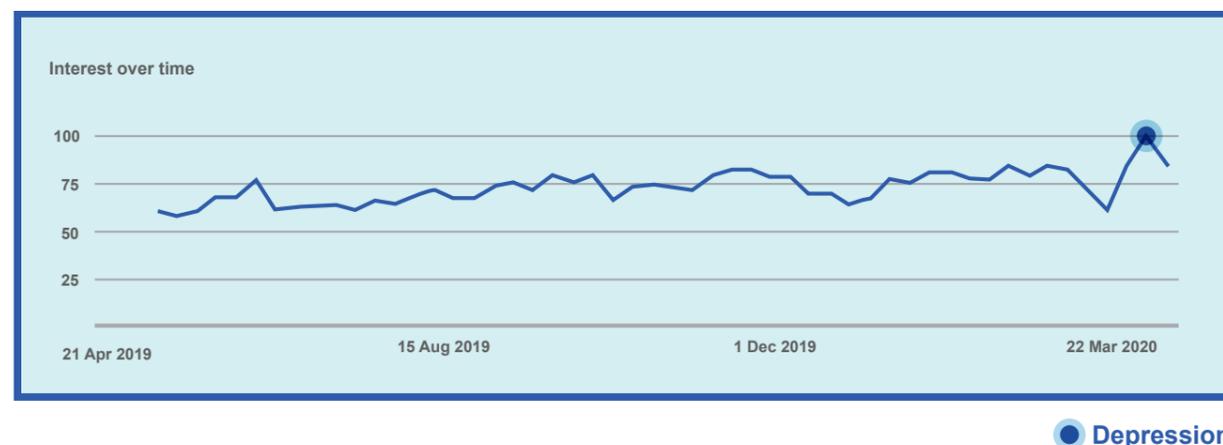
MENTAL

HEALTH

The WT LOCKDOWN STUDY showed that the cocktail of escalating virus fears, isolation and fear of recession is fuelling anxiety in Indian homes. With exam delays, hiring freezes and salary cuts rapidly becoming the new normal, 1 in 2 people in our study agreed that: Since the lockdown, I have seen a rise in overall stress, irritability and / or poor sleep.

This is quickly spiraling out of control. An Entrackr article claims that online mental wellness apps have seen a 30% spike in Indians calling in to discuss their anxieties connected to the COVID-19 pandemic.

Google Trends data corroborates this. From March-April 2020, the search for the term 'depression' was at a peak when compared to historic data over the last 12 months.



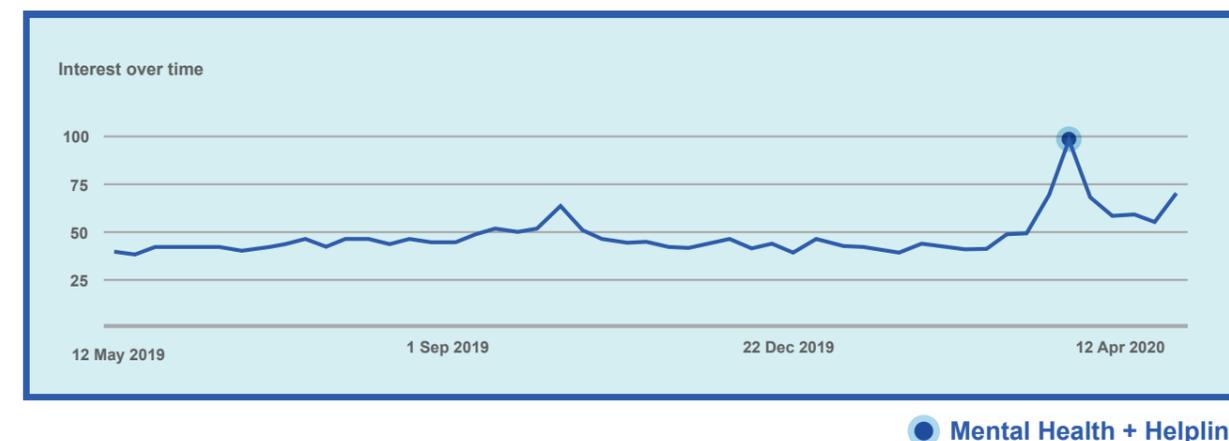
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Rajul Jagdish, Founder and Psychotherapist, Room - The Mindcare Space, told us that the lockdown was affecting his clients in different ways: **“The most common is the anxiety induced by the forced isolation, as many are staying away from their families and of course, the uncertainty of when this will all end. Irritability and restlessness is a very common, albeit minor symptom. Overuse of phone/gadgets, mindless scrolling/swiping is all a part of it.”**

”

This is also leading to collateral problems, one of the biggest being domestic violence against women and children. The number of calls on abuse and violence received on the government helpline increased by a whopping 50% after the lockdown. As per **Rajul Jagdish, “Weekdays are blending into weekends and people are feeling burnt out because recreational activities are also limited indoors. Many are trapped in toxic home environments and are dealing with increased sexual and domestic violence, the numbers of which are definitely higher than what is being reported.”**

Hearteningly, a supportive ecosystem is emerging. Recognizing the stress of the student community over exam uncertainties and placements, the UGC recently directed universities to set up mental-health helplines for students. Psychologists have offered free services for COVID frontline warriors suffering from PTSD. People are seeking help, as is seen in the surge in searches for a mental health helpline.



Even professionally, companies like Microsoft, P&G and Deloitte have got professional assistance to help employees tackle the turmoil due to social distancing. And you might like to check out this WT PRODUCTION that came out of an initiative to keep employees connected and upbeat!

<https://www.youtube.com/watch?v=sAnBNh-MjGk>

WHAT MAKES THIS RELEVANT

It is very likely that post-COVID, the attitudes to mental health and related issues will change significantly. There is a new sensitivity that is already reflecting in people by virtue of having undergone similar challenges. There is also the beginning of an ecosystem that will continue to be relevant in the future, given the continued pressure on health and economy.

Along with this, we may see the emergence of more products and solutions that cater to the mental health crisis. Already nearly 80% of the people in our study have claimed to have downloaded apps like Headspace, for meditation. Will we see more such mental detox solutions becoming a part of our mental health ecosystem?



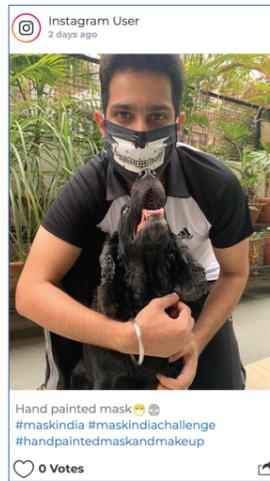
09

HEALTH

FASHION



Earlier this year, Wunderman Thompson collaborated with The Times of India for the #MaskIndia initiative, which encouraged people to create their own DIY masks. The initial intention was that Indians across strata should be able to use something sustainable, that could effectively serve as a mask. But once it was opened to the public, people quickly turned it into a Fashion-first campaign, with influencers and readers posting cool mask pictures.



Fashion has always drawn inspiration from current contexts. As per Forbes, 30+ fashion brands are about to make stylish masks. Recently, Paris Fashion Week debuted haute couture masks, and the Guardian even coined the term: 'Coronavirus Couture'.



With the COVID-19 threat likely to linger in some form for some time, this could be the first step towards making health mainstream for a longer timeline beyond the pandemic. Recently, Wildcraft tied up with Myntra to launch reusable outdoor protection masks that are anti-dust and anti-bacterial.

In The WT LOCKDOWN STUDY:

2 in 5 people said that with masks becoming the norm, they would consider paying a premium for a customized or fashionable mask.

But what makes this even more interesting, is not just the integration of fashion in health, but also the reverse integration of health in fashion.

The WT LOCKDOWN STUDY reinforced this:

1 in 3 people said that there should also be health benefits in other fashion categories like shades and scarves.

Almost an equal number said that they would consider paying a premium for fashion brands offering anti-bacterial properties in everyday clothing.

Fashion photographer **Bill Cunningham** is reported to have said that: **“Fashion is the armour to survive the reality of everyday life.”**

Now, it looks like this will be truer than ever before!

WHAT MAKES THIS RELEVANT

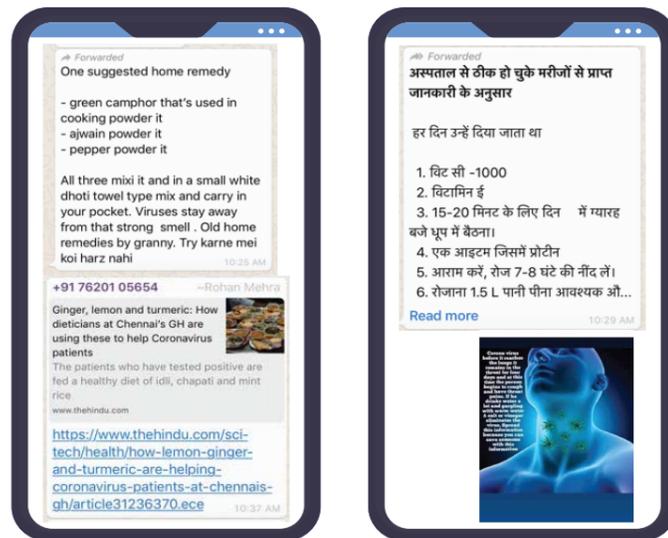
The fashion revolution has the potential to make deeper inroads into the pharma and wellness sector. Thus-far, we have sporadically seen celebrities wearing cute fracture casts and hot water bags, but there has never been any real, serious attempt to make health look fashionable. Going ahead, will we see designer back straps, fashionable knee caps, wrist fracture bands, hot water bags, healthy glasses and haute couture fitness bands?

Will this be a key intervention that will go on to give health a fashion makeover?

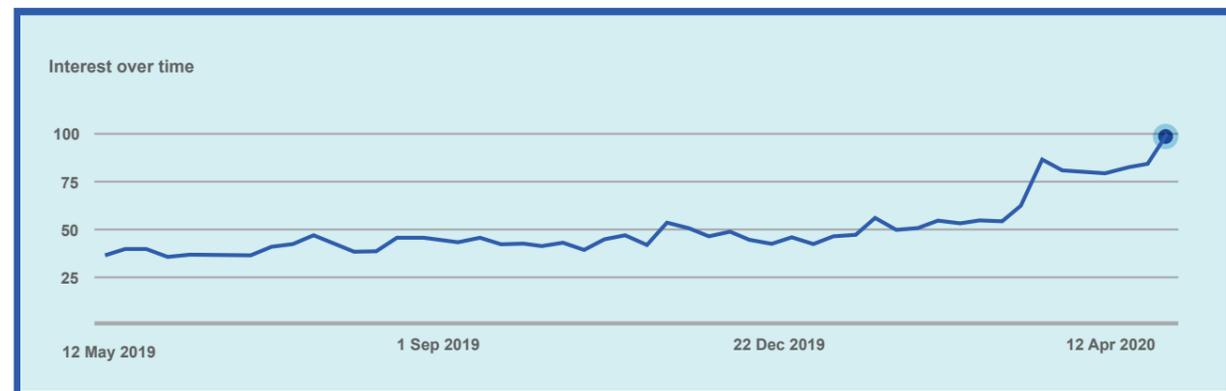


10
HOME-MADE
IN INDIA

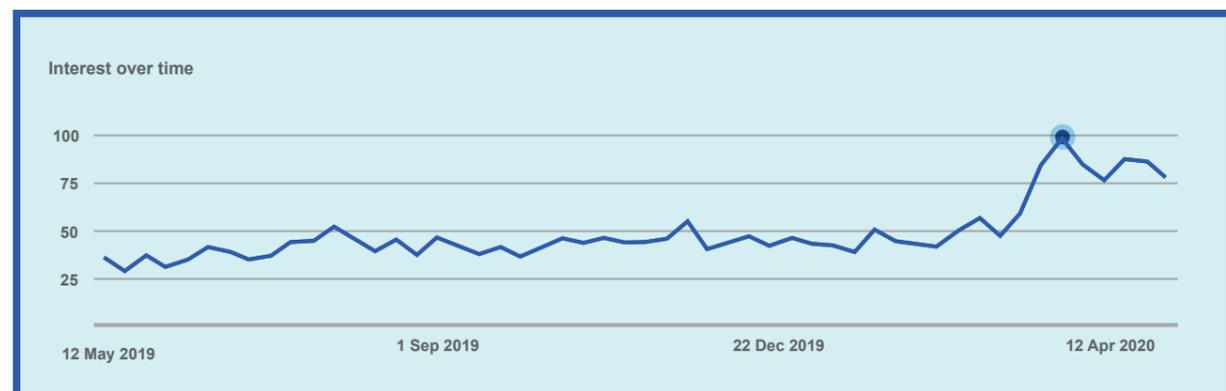
COVID-19 season saw a flurry of Whatsapp wisdom that recommended all kinds of Indian recipes, ingredients and processes as preventives. **As Indians started feeling more vulnerable, traditional Indian ingredients and regional recipes known to build the core, started being pulled out of grandmothers' diaries.**



Google Trends also shows spikes in the search for 'turmeric' in the last 12 months, including 'pepper' and 'rasam' - all kitchen remedies against cold and coughs.



● Turmeric



● Rasam

Indian wisdom finds strong belief in all quarters. Recently, **Yugal Kumar Mishra of Manipal Hospitals Delhi**, was quoted in ET saying, **“Remedies like tulsi, methi or ginger can help in boosting immunity, especially in people 60 years or above in age, with a history of diabetes or hypertension, who are prone to catching infectious diseases easily.”**

In the last couple of months, Indians has seen two directly contradictory POVs. On the one hand, the WHO strongly refuted claims that ingredients like lemon, turmeric, curry or rasam have COVID-19 applications.

On the other, a Ministry of Ayush circular said that “Spices like Haldi, Jeera, Dhaniya and Lahsun are recommended in cooking” and went on to talk of herbal tea, Kadha made from Tulsi, cinnamon, pepper etc. So which way would people go?

The WT LOCKDOWN STUDY suggests that belief in herbs, herbal products and homemade recipes is winning hands down, given that:

82% people had started / said they would consider taking lemon or turmeric in some form to build the body's immunity.

86% agreed that traditional ingredients like Tulsi and Pepper or preparations like Herbal Kadha could have immunity properties that the West doesn't understand.

“ **Siddhesh Sharma - President, Baidyanath Group and Founder & CEO - Natureedge Beverages Pvt. Ltd.** puts this in perspective: **“Indian ingredients have a power that the West is also beginning to adopt. Most of the ingredients in our spice box have curative powers, from peppercorns to cinnamon to turmeric. In fact earlier, half the health problems would go away just with homemade remedies, you didn't have to pop pills. Now, at this point when the world needs these curative powers more than ever, we are seeing global acceptance of Indian ingredients, herbs, and Ayurveda.”**

WHAT MAKES THIS RELEVANT

Pre-COVID, India has been veering towards western superfoods; Chia seeds, hemp seeds, kombucha, avocado, kale... the list goes on. With our belief in traditional ingredients resurfacing, we are seeing a mindset reverting to Indian wisdom and quintessential kitchen ingredients, in both, consumers and brands. For instance, Dabur recently launched Tulsi drops.

There used to be a time when certain ingredients could launch anything in India - from health drinks to capsules, and hair oils to body oils. Almonds, for instance. Or Neem, for everything from anti-dandruff to anti-pimple formulations. This has been dormant in the recent past, but with the revival of beliefs in Indian wisdom, will we see India's power ingredients once again driving revolutions across categories?

Q. Does lemon or turmeric prevent COVID-19?

Fact: There is no scientific evidence that lemon/turmeric prevents COVID-19. In general, however, WHO recommends consuming adequate fruit and vegetables as part of a healthy diet.

Q. Does eating rasam or curry protect from COVID-19?

FACT: There is no scientific evidence that rasam or curry protects from COVID-19.



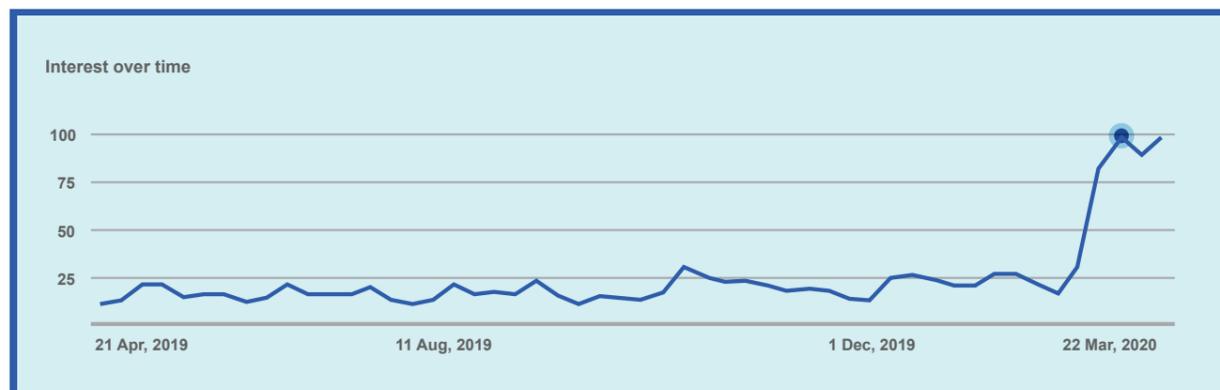
11

INDOOR

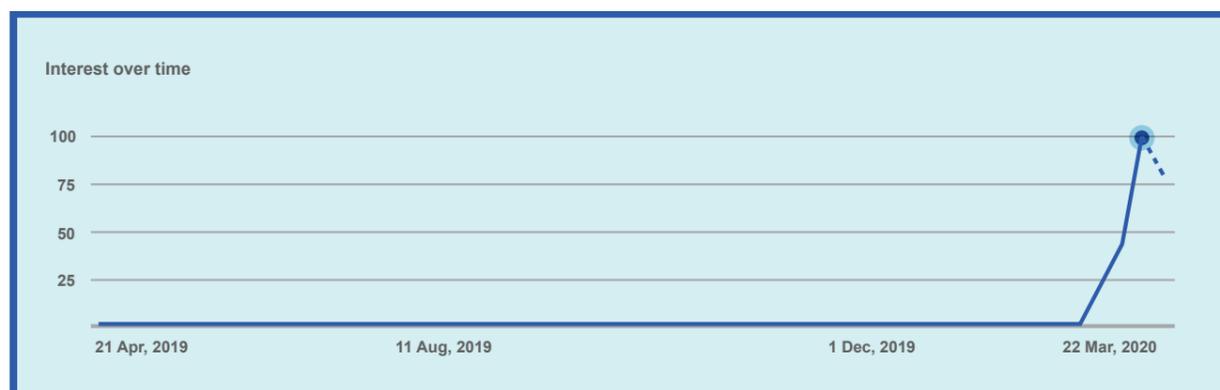
FITNESS

Within the first few weeks of lockdown, fitness enthusiasts started getting vocal about staying away from their favoured fitness haunt: the gym, the golf course or simply, morning walks. But what is interesting is that the lockdown seems to have brought about a hankering for fitness, even among people who are not fitness enthusiasts. A moneycontrol.com feature has **Rishikesh Kumar of Xtraliving** saying that: **“While only 2-3% of the population goes to fitness centres, now, the remaining 97-98% who did not prioritize fitness is also being forced to think about it, due to the pandemic.”**

Not surprisingly, Google Trends shows the sharpest ever increase in the terms: ‘Exercises at home’ and ‘Lockdown Fitness’



● Exercises at Home



● Lockdown Fitness

The WT LOCKDOWN STUDY corroborated this:

1 in 2 people said that the lack of an outlet for physical activity was making them more hassled and irritable.

70% were worried that the forced inactivity, combined with snacking, could make them / their families gain weight.

Many have improvised by making at-home, makeshift fitness routines. Many TV and film celebrities have posted pictures using stairs, terraces etc. as fitness spaces. With gyms cast as potential red zones, this is likely to continue post-lockdown.



In The WT LOCKDOWN STUDY, we found that:

1 in 2 people had joined an online fitness class / downloaded a home workout app.

79% said that even after lockdown, it might make sense to take fitness classes online, instead of going back to gyms.

44% took it a step ahead and said they would consider investing in a treadmill or some other home fitness equipment.

Brand are stepping in to help. Fitness brand Cure.fit has launched its new online platform, cult.live, where it provides strength training, cardio, yoga and dance fitness sessions online in lieu of gyms.

“**Karan Talreja, Co-founder of Reset Gym, told us: “Currently we are conducting group classes on our social media platforms like Yoga / MMA / HIIT on a regular basis for our members and general public. We are conducting online personal training for our PT clients through video calls. We are also providing online nutrition consultation to manage the diets as this is the best time to maintain a healthy lifestyle and we do online breathing classes to calm the mind.”**

WHAT MAKES THIS RELEVANT

As hygiene fears continue to keep people away from fitness centers even after lockdown, digitization is likely to continue to play an integral role in fitness. The question is how brands can form or be a part of this ecosystem. Be it fitness apps, fitness bands or in-home fitness apparel, how can brands seamlessly position themselves in this new normal? With the home doubling up as the fitness center, will we see new opportunities for sports equipment and exercise brands? Given that India eats fitness as much as it sweats fitness, will this new consciousness around fitness shape a variety of categories ranging from Vitamin D shots to green tea to sweeteners?



12

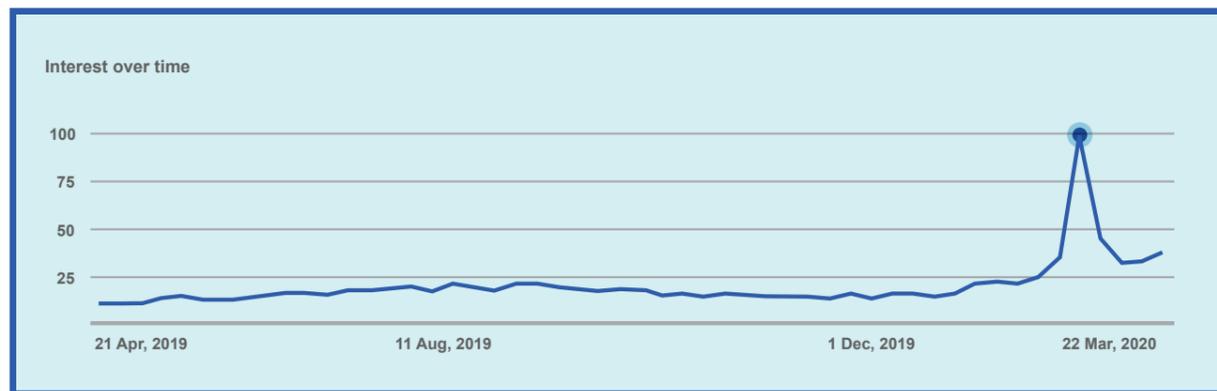
MONITOR

THAT

The Withings Thermo is a contactless thermometer that uses 16 sensors to take more than 4,000 measurements in 2 seconds, which it then syncs to a mobile app. But according to the company, no one can buy one until late April because all inventory was depleted weeks ago. Chinese startup MegaHealth Information Technology Co. saw a 5-fold increase in its sales in post-COVID months as compared to the last quarter of 2019 - largely thanks to its medical ring that can monitor heart rate and blood oxygen levels.

With an overwhelming 98% people in The WT LOCKDOWN STUDY saying that they will be wary about going to hospitals and clinics unless there are strong cleaning and disinfecting measures taken, we are seeing a growing focus on self-monitoring of health parameters, before they spiral out of control.

Topping the list, is the humble thermometer. Google Trends show the highest spike in March 2020 as compared to results over the last 12 months. Like **Andy Yap, a social psychologist** at the INSEAD business school, said in Japan Times, **“Having accurate and immediate feedback about our body temperature, blood pressure and other health signals helps to restore people’s sense of control.”**



● Thermometer

The WT LOCKDOWN STUDY captured these changing mindsets:

3 in 4

people say that rather than going to the lab every time for checking sugar or going to the doctor for checking BP, every home should have a glucose meter and BP monitor.

78%

feel that it is safer to check blood sugar at home using a glucose monitor, rather than going to the lab for a blood test.



Vivek Desai - Category Manager, Roche Diabetes Care, confirms this: “We believe that people with diabetes (PwDs) have become vigilant about their sugar levels during these times. As a result, at-home, self-monitoring of blood glucose should see greater adoption levels, considering that PwDs now realise that having a glucometer by their side helps them monitor the impact of medicines, lifestyle and diet on sugar fluctuations. We also recommend that they should practice #GlucoVigilance i.e. keeping a careful watch on blood sugar levels regularly, to keep diabetes in check.”



Around the world, there are efforts to facilitate this. John Torous, a researcher at the Harvard-associated Beth Israel Deaconess Medical Center is integrating the Apple Watch and Google Fit data into a common platform, allowing patients to consult with doctors online and share measurable health indicators. Clearly, self monitoring just got a shot in the arm!



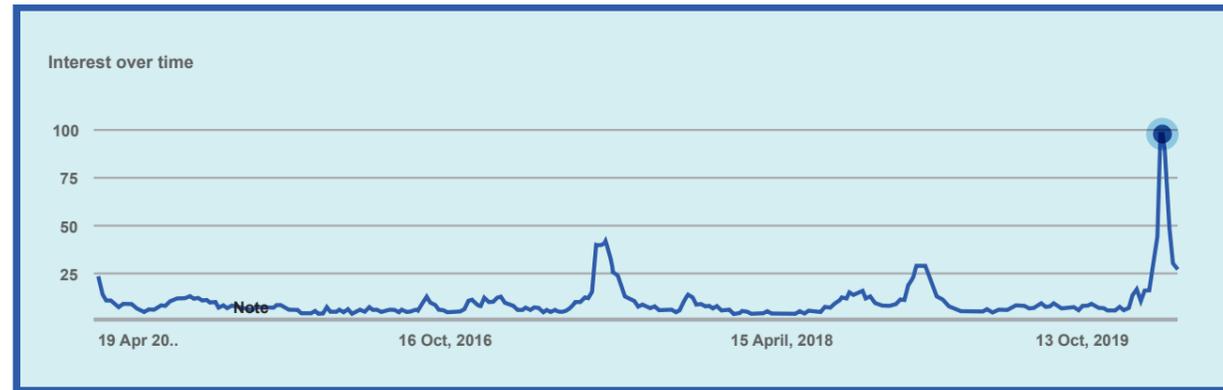
WHAT MAKES THIS RELEVANT

As the need to self-monitor health parameters goes up, people will be ready to listen to a host of self-monitoring devices and solutions. There will be an opportunity for digital integration that allows for more efficient self-monitoring. This potentially opens the doors for remote patient monitoring, which allows health providers to monitor disease and symptom progression remotely and then engage with patients virtually to modify care plans. This gives an added impetus to online doctor consultations and also changes the format of the family doctor consultation. At a larger level, is the ritual of ‘regular check-ups’ about to change course from doctor visits to home checks?

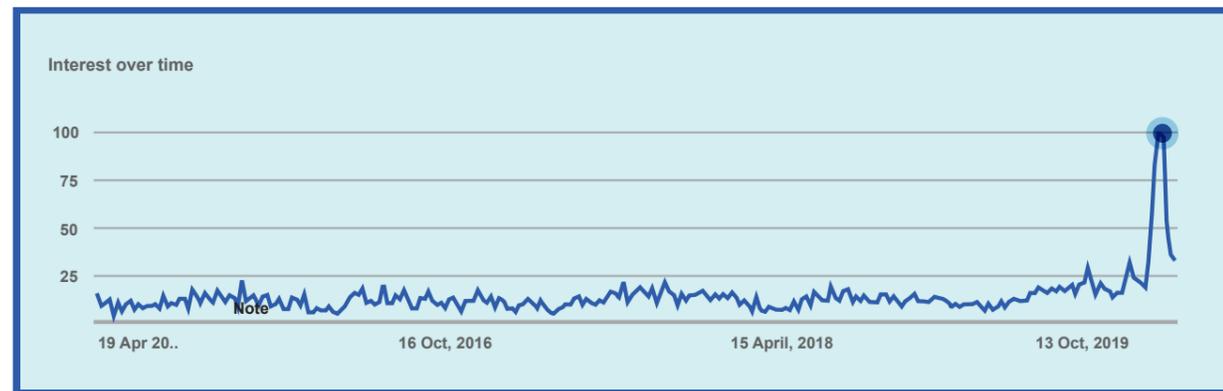


13
RISE OF
COLD & FLU

Traditionally 'cold and flu' have always been at the bottom of the consumer's anxiety pyramid. You popped a pill, took a course, they went away. Take a look at these Google search trends and you can see that this has changed altogether!

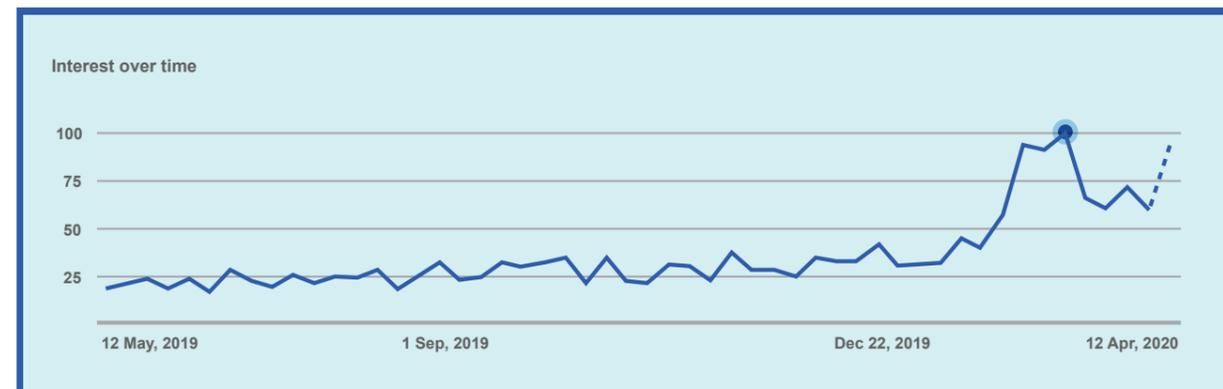


● Flu



● Runny Nose

This trendline is not just a 12-month high. Searches for flu and its low-profile cousin 'runny nose' are at a 5-year high. **Dr. Mehra, a reputed homeopath, had this to say: "Nobody wants to take a chance with colds and fevers today. Even for a 98.5, they phone and ask what medicine they should take. The weather change is not helping... even people who are down with seasonal coughs and colds start getting worried."**



● Betadine Gargle

The spike in Google searches on **Betadine gargle**, seems to show that people want every front covered.

This seems to follow the same pattern as the H1N1 outbreak period. A Euromonitor Passport study called 'Mapping the Effects of Coronavirus on Health' that looked back at how OTC sales changed with the H1N1 outbreak found that the outbreak had raised global sales of cough, cold and allergy remedies, especially in the hard-hit markets in Asia Pacific, with 2009 seeing the region's fastest annual growth during the period 2005-2019. The report quoted: On the whole, though, it looks clear that the H1N1 outbreak stimulated growth in OTC purchases at a global level, despite the relative speed with which a vaccine was formulated, raising the likelihood of a similar effect for COVID-19 in 2020.

Chemist conversations corroborated that people are stocking cold & flu products and related products. Like one chemist listed: "People are buying more cough syrups, nose drops, throat syrups, cold & flu tablets, products like Dabur Hotsip." Nor is this a one-time phenomenon.

The WT LOCKDOWN STUDY showed that cold & flu paranoia is here to stay!

100% people say that even post-lockdown, they will be avoiding physical contact with people who have cold / flu symptoms.

95% say that post-lockdown, if they themselves show cold / flu symptoms, they will self-quarantine till they're better.

Like **Dr. Sanjay Patil, President of IMA, Pune Chapter**, summed it in a Pune Mirror article: **"For so long, people would treat their fever and other symptoms with OTC medication, and now they are panicking over it!"**

WHAT MAKES THIS RELEVANT

Clearly there is nothing 'common' about the common cold anymore. Cold and flu form a very large canvas that spans pills, syrups, hot sips, all kinds of Allopathic, Homeopathic and Ayurvedic treatments. This canvas was hitherto quite stagnant, with established brands being automatically assigned for the relevant symptom.

But with this newfound active involvement around the area, the canvas might now open up to other trusted brands that come up with newer formats, faster relief and better formulations and change the game in their category.

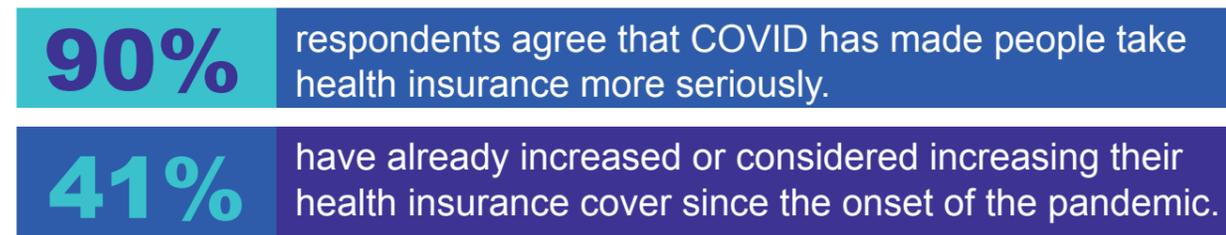


14
INSURING
HEALTH

India has traditionally been underinsured, and as of 2019, the density of non-life insurance, which includes health insurance, was a mere 19%, according to the IRDAI. **But with COVID-19 fueling a feeling of vulnerability, many people are going beyond merely protecting themselves to protecting their families by investing in health insurance.** As per a Business Today feature, Policybazaar recorded a jump of 35-40% in health insurance during March 2020, while life insurance registered a 20% growth. Similarly, Digit Insurance, a digital insurance player, registered a 50% increase in average policies sold per day in March over January.

This has been the trend even in previous health scares. As per Bain & Company data, Chinese health insurance premium growth skyrocketed at the time of SARS. This time too, the pandemic has accelerated innovative insurance programs like mutual-aid platforms - peer-to-peer models that offer insurance-like benefits, in which members share the burden of medical claims.

In India too, The WT LOCKDOWN STUDY shows a growing predisposition to health insurance.



Responding to the huge need for insurance protection from COVID, the Government has directed insurance players to cover COVID-19 claims. Some players have even come out with specific coronavirus policies. For example, Phone Pe, in partnership with Bajaj Allianz General Insurance, has launched its insurance policy - Corona Care.

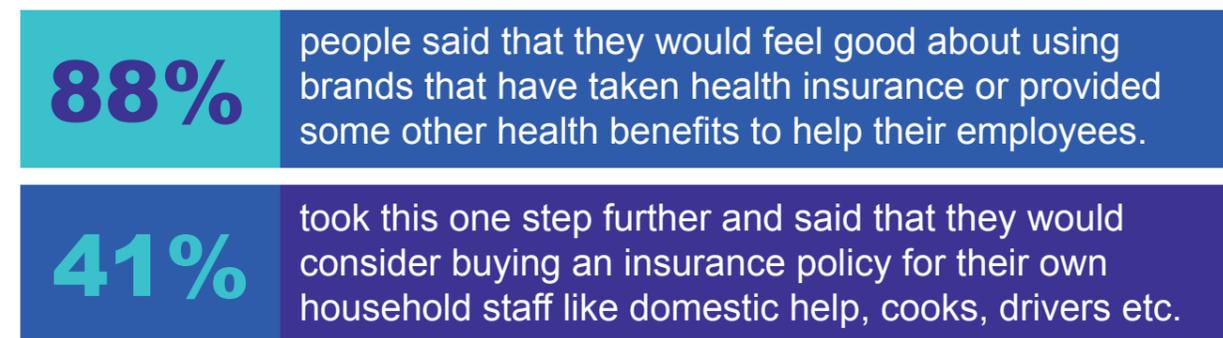
Sameer Nigam, Founder and CEO, Phone Pe, explained this move to ABPLive: 'Many Indians don't have health insurance covers, so they will be faced with an added financial burden

in case someone in their family needs to get hospitalization treatment for COVID-19. Corona Care is priced at Rs.156 with an insurance cover of Rs. 50,000 that covers 30 days of expenses related to pre-hospitalization costs and post-care medical treatment.'



But the surge in health insurance is not just restricted to individuals. The government has made it mandatory for all employers who resume functioning after the lockdown to provide medical insurance to their employees. This comes on the back of the Rs. 50 lakh insurance cover provided to frontline health workers (per person) fighting COVID-19. What is interesting is that people are appreciating health insurance as a do-good gesture.

In The WT LOCKDOWN STUDY:



WHAT MAKES THIS RELEVANT

Going ahead, health insurance covers are likely to become more comprehensive, but premiums will also become more costly. At a time when finances are already under pressure, this will further strain people's resources. At this point, it will literally pay to be healthy. Bringing down risk factors like uncontrolled diabetes, cholesterol and smoking can significantly reduce health premiums. In the past, companies have rewarded people who've gained fitness, with lower premiums.

At the end of 2019, IRDAI proposed that insurers should offer wellness perks to policyholders, like redeemable vouchers for the purchase of protein supplements and other health supplements, memberships in yoga centres, gymnasiums and other fitness activities, along with vouchers for OPD consultations and treatments, pharma and health check-ups. If health insurance companies do this, they could become an active health player at a time when India needs it the most.



15

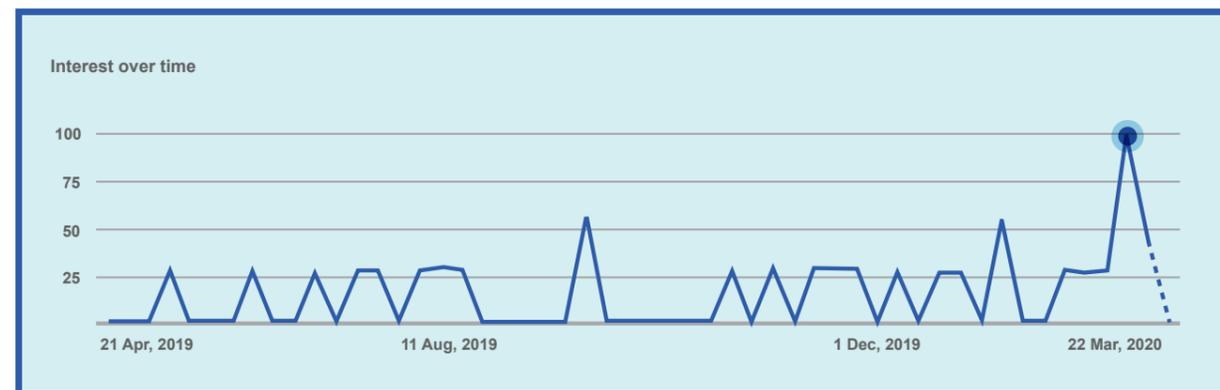
EXPANDING

MEDICINE

BOX

The first thing Mrs. Dave, a homemaker in Gurgaon, did when the lockdown was announced, was to visit the local pharmacist to purchase OTC medication such as painkillers, paracetamols, cough syrups, and even rarely-used ones like analgesics, alongside regular prescription pills. **'We have two young children at home, and my elderly father-in-law. We need to be prepared with our own stock of medicines at home. With the lockdown, you never know when you'll need something, whether they'll be available and if we can get it delivered.'**

Of course, the most panic is for regimen medicines for diabetes and heart ailments. As per a LiveMint article, in March, the Indian sales of cardiac care and anti-diabetes medicines grew by nearly a fifth to ₹1,669 crore and ₹1,259 crore respectively, while respiratory drugs grew by 23% to ₹1,026 crore. All three segments had grown by around 11% in February.



● Home Medicine Kit

However, even outside of emergency medicines, people are stocking OTC medicines as well. Google Trends shows a 75% increase in the search for 'home medicine kit' in April 2020. A study by WT Thailand showed that 32% respondents had increased the purchase volume of over-the-counter medicine, 28% has increased spends and 17% had increased pack sizes.

The sentiment of stocking up the home medicine box is one that echoes across the world. In the US, Nielsen saw shoppers stock up on medicines, with sales of children's medicines increasing by a massive +124%. Expectedly, there has been a huge spike of 150% in the sales in OTC cold and flu drugs.



An increased consciousness for stocking up on the contents of the medicine box and its contents is nothing new. According to a Euromonitor study, during the H1N1 epidemic of 2009, OTC cough, cold, and allergy remedies saw a sharp surge in sales, despite the relative speed with which the vaccine was formulated. This raises the likelihood of a similar effect for COVID-19.



Already, an Indian Express article quoted sources talking of how people are thronging to buy betadine gargles and how infrared thermometers are already out of stock.

But what is interesting is that even non-coronavirus-related medicines have seen a surge. According to Nielsen US, during the four-week period ending March 28, year-over-year sales of bandages were up 24%, while first aid kits increased 119%. Sale of medical masks and household maintenance masks increased by 319% and 262% in 3 weeks, as of Feb 22, 2020. Similarly, there's been a 58% increase in sales of emergency supplies.

WHAT MAKES THIS RELEVANT

While a component of the OTC sales can be attributed to panic buying, some of the demand will continue. People will keep wanting to sustain vitamin-tablet-buying to boost immunity, ailment medicines will per force need to continue, cold & flu related medicines will need to be re-stocked after seasonal ailments. All studies across countries suggest that people are looking at trusted brands for medicines. For the trusted names in certain segments, this surge in demand could open new opportunities in new segments.

The other interesting question is whether, given the uncertainty of finding certain medicines, we will see new models like subscription systems starting in pharmacies, to reassure members of supply of their regular medicines.



16

HEALTH

AT

WORK

According to The Economist, a quarter of all Americans working in the private sector get no paid sick leave at all, and are more likely to take the risk of continuing to come to work even if facing flu-like symptoms. In 2009, the outbreak of swine flu presented workers with a similar dilemma. Many decided to turn up for work and as per a study by the institute for Women's Policy Research, an estimated 7 million co-workers were infected as a result.

This predicament is going to be particularly relevant for India. Indians are notorious for working the longest hours and taking the least number of vacation days, as per an ET article. So while the government has directed companies to provide fully-paid-leaves for an average of 14 days to all employees who test positive, getting people to quarantine is harder. At the onset of COVID-19, many Indian companies like Tata Steel and Swiggy have tried to take care of the financial aspect of this, by revising their leave policies to encourage employees to self-quarantine, in case they were showing symptoms. But with everybody around working, there is a tacit pressure to suppress symptoms and 'bravely' get back.

So, monitoring individual employee health to protect the larger group will be very important. Unilever has already asked employees to apply hand-sanitizer upon entering a Unilever site and undergo thermal testing upon arrival at any Unilever site. **Roopa Badrinath, Chief Talent Officer, Wunderman Thompson - South Asia,** believes that heat monitors will be a reality: **"The scale at which this virus spread has never been witnessed, neither by this generation nor the previous. In such situations, we tend to rationalize that it is better to err on the side of caution."**

This means that there will be more demand for health products, gadgets and solutions at corporate workplaces, campuses and factories. Pre-COVID, Indians spent more time at work than at home, so workspaces will see more of heat monitors, doctors on campus, workspace masks, workplace sanitizers, anti-bacterial soaps and handwashes and so on. In factories, if workers have to man machines used by other workers, they will need gloves and other hygiene mechanisms. The WHO advisory asks companies to: Make sure that staff, contractors and customers have access to places where they can wash their hands with soap and water. This means that Indian factories and smaller outfits will need more hygiene stations and facilities.

For some industries, the responsibility of maintaining health at work is even more. Rebel Foods brands, Behrouz Biryani and Oven Story, have started the practice of measuring body temperatures of their personnel involved in food preparations, at 3-hour intervals. These readings, along with temperature readings of delivery boys, are shared with customers.

But **Roopa Badrinath** believes that overall, the Corona Virus experience has shown the empathetic side of co-workers, leaders and organizations: **"The safety of people became the mantra across all organizations. It was not driven by any selfish motives - but with the genuine intent of being there for their people."**

In a Livemint article, an executive from an electronics hardware manufacturer talked of how hygiene concerns affect transportation: "Earlier one seat in the bus sat four workers. Now, it can seat just one. One worker per seat means I have to run over 100 buses for the same plant."



WHAT MAKES THIS RELEVANT

Corporate India's need to monitor and safeguard its employees' health, is likely to open a huge B2B channel for all kinds of health and hygiene products and services. The obvious ones are, of course, sanitizers at receptions and anti-bacterial handwashes in washrooms. But outside of this, different gadgets ranging from heat monitors to air purifiers could get a fillip. Doctor services on corporate campus could see a huge surge. Sanitization needs of corporate infrastructure from company buses to corporate lifts, would create opportunities. Perhaps, we will see new brands and solutions coming up to take care of these emerging needs.



17

DEEP

CLEAN

While the focus on personal and home hygiene continues, the question at the back of everyone's mind is, what happens when the cocooning stops and you have to step outside into crowded, public places? What about the hygiene then?

The WT LOCKDOWN STUDY throws light on how public spaces will continue to be under the scanner, after lockdown:

93% people said that they would be wary of returning to supermarkets and malls unless they take strong cleaning & disinfecting measures.

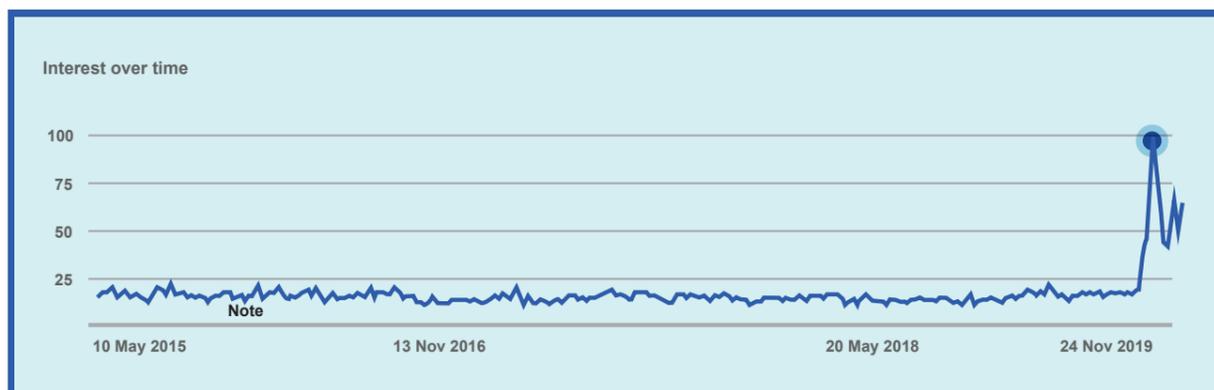
97% said they would avoid going to the gym / fitness classes, unless they took strong cleaning and disinfecting measures.

91% said they might not feel fully comfortable using Uber or Ola, for some time after the lockdown.

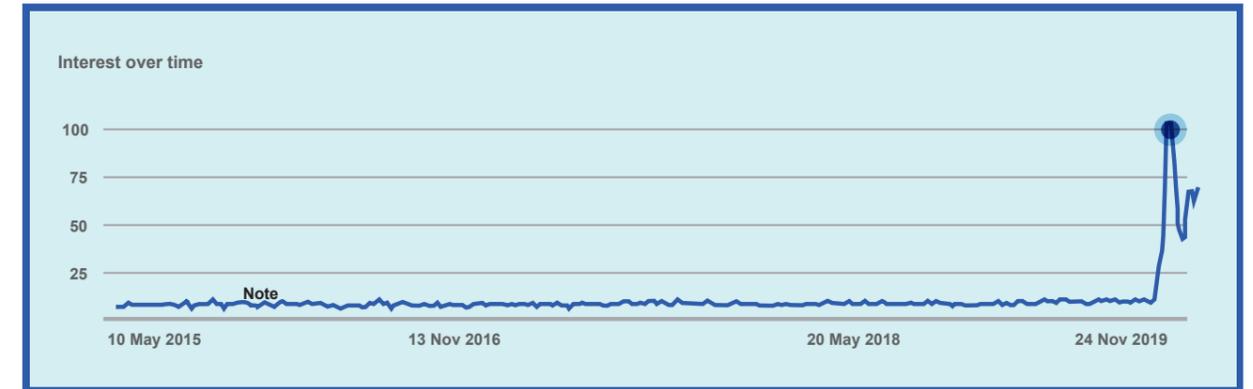
Clearly, 'clean' is not enough anymore, especially when it comes to public spaces. People want deep-cleaning that disinfects in the truest sense and assures them of a germ-free, hygienic atmosphere.

This was reflected in the advisory issued by the Ministry of Health in March, which carried detailed guidelines for disinfecting public spaces - like 70% alcohol to wipe down metal surfaces, mopping high-contact surfaces such as elevator buttons, handrails/handles and call buttons, with a disinfectant with 1% sodium hypochlorite or phenolic disinfectants and so on. Earlier, when the DCGA instructed airlines to deep-clean aircrafts daily, India Today ran a feature on how Go Air aircrafts were cleansed over 5-6 hours, disinfecting more than fifty areas in the aircraft that passengers could have touched.

But the need for deep-clean is driven by people. In March, The Hindu reported that calls to the Greater Hyderabad Municipal Corp. for disinfectant spraying had multiplied in various localities. Google Trends also shows a five-year high in searches for 'office disinfectant' and 'housing society disinfectant'.



● Disinfectant + Housing Society



● Disinfectant + Office Spaces

Of course, WhatsApp is having fun with this obsession, with videos showing newspapers being ironed and microwaved and vegetables being disinfected. But destination brands and shared spaces will need to undergo 'a test by deep-clean' to get public confidence going again. And many of them are taking this responsibility very seriously.



Like Paresh Mishra, Sr. Vice President - Sales & Marketing at EsselWorld & Water Kingdom says: "With the news of the outbreak of the pandemic, we started sanitizing all our parks thoroughly, including our rides and washrooms, which were being cleaned twice a day. Our staff and guests were thoroughly checked for any medical symptoms and, as a practice, we are still doing all of the above and will continue to do so in the future as well."



WHAT MAKES THIS RELEVANT

'Deep-clean' as a trend has the potential to open up every public space to the demand for better disinfection and hygiene. Gyms, malls, multiplexes, airports, even corporate complexes will need to match compliance on deep-clean needs. Then there are business models like ride share apps and co-working spaces, which will need to up the ante on hygiene, to boost consumer confidence levels. It will be interesting to see if this inspires new players with innovative products and solutions to get into the field and pave the path for cleaner, more hygienic public and shared spaces in India.



18

HEALTH

TECH

It looks like COVID-19 is finally triggering the rise of the robots! AIIMS recently deployed a floor-cleaning robot that can disinfect COVID-19 wards, without human intervention. The Fortis Hospital in Bengaluru has deployed an interactive robot at its entrance to screen everyone, including medical staff. This uses face and speech recognition technology to ask questions and thermal scanners to take temperature readings. Asimov Robotics, a Kochi startup, has developed bots that hand-out sanitizers and masks, clean handles with sanitizers and can even hand-out food to COVID-19 patients.



Photo: Reuters

With COVID-19, technology and digitization are playing a big role in the health and hygiene sectors. Till last year, Marut Drones, a Hyderabad startup, was mostly working on mosquito eradication, but with the onset of COVID-19, they have deployed 23 drones across 8 districts in Telangana for a variety of COVID-19 control activities, including disinfectant spraying, making public announcements, doing a thermal analysis to track fevers in crowds, medical delivery and general surveillance. The government also used surveillance drones to ensure that people were strictly adhering to lockdown restrictions in Red and Orange zones, and recently launched the GARUD portal for fast-track approval to COVID-19-related drone operations.

What is relevant from a sustainability POV, is people's engagement with health apps. More than ever before, people are relying on apps for health tracking benefits.

Leading the show is the Indian Government's mobile app, Aarogya Setu, which helps people self-assess the risk of getting infected with Coronavirus, and alert authorities if they have come in close contact with an infected person. It also detects the presence of any infected person in the vicinity. Within a month of launch, the app had already been downloaded over 83 million times. Indian app HealthifyMe has introduced a free immunity assessment test, hand-washing tracker and other immunity-building tools on its app.

The WT LOCKDOWN STUDY showed the growing predisposition to such apps:

89%

people said they had downloaded or would consider downloading an app that alerts them to a Coronavirus risk nearby.

77%

said that they would like this app to indicate other kinds of viruses and health threats as well.

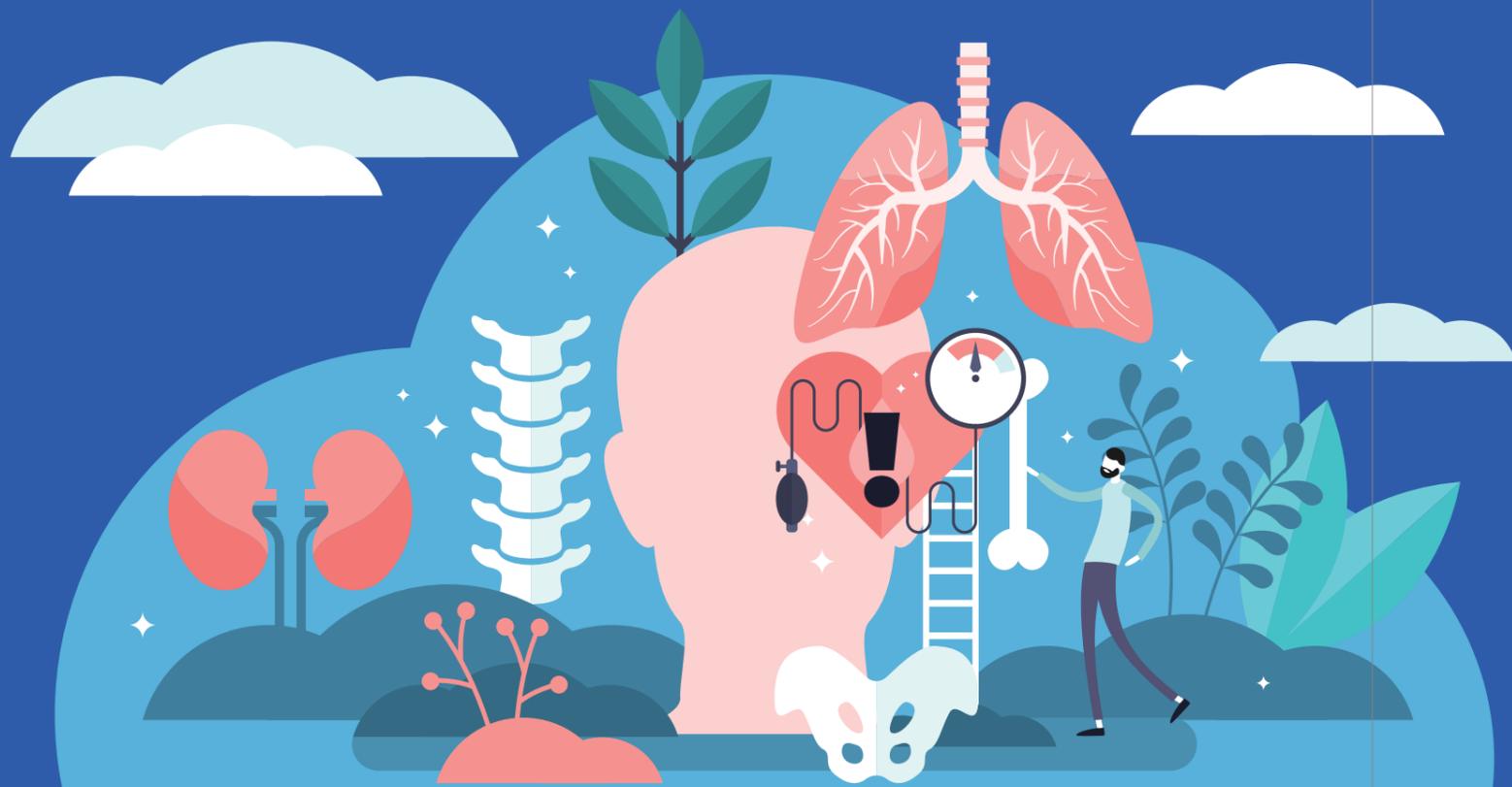
As per hcamag.com, a number of HR technology firms are responding to the demand for better health-monitoring by corporates by launching COVID-19 trackers. For instance, Kokomo's COVID-19 Tracker uses AI to gauge the probability of reported employee cases needing proactive intervention. Reports use an AI-powered scoring system designed to manage false positives and pinpoint at-risk employees more accurately. The tracker is available as a mobile app and web portal, and includes features for managing incidents, reporting cases anonymously, and coordinating emergency response.

WHAT MAKES THIS RELEVANT

This is interesting at two levels.

On the one hand, the fight with COVID-19 is going to be a long-drawn one, and even today, our healthcare workers do not have sufficient protective equipment. The surge of contactless technologies like robots in healthcare could go a long way in reducing the risk of infection. The application of robots to screen people might even expand from just hospitals to shared spaces like airports and even larger corporate campuses or universities.

The other interesting element is that we have seen government bodies, individuals and companies using health tech in some form or the other, to augment their efforts. In the process, they are creating new health platforms and behaviors that have the potential to form a part of our lives, even post-COVID. It would be interesting to see how brands can repurpose these platforms, to form powerful new health ecosystems.



19

SEDENTARY

AILMENTS

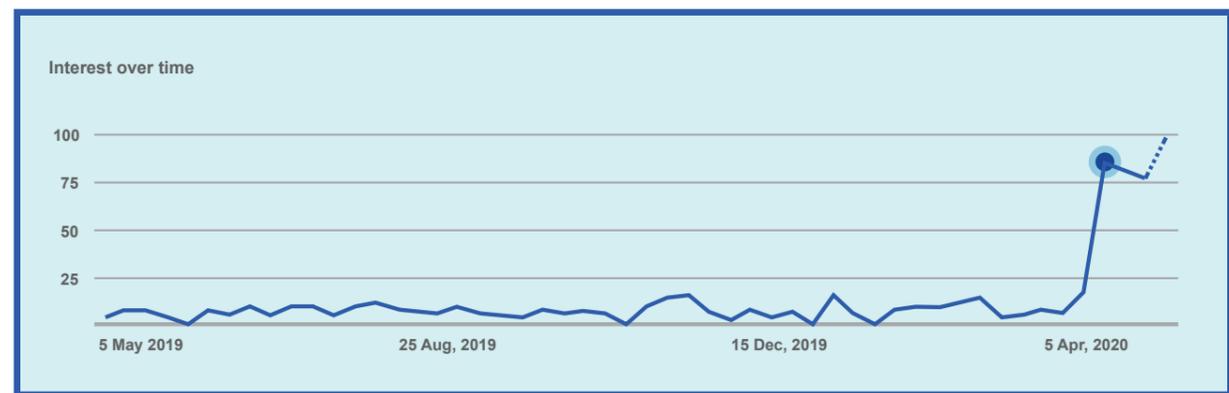
We've all heard that 'Sitting is the new smoking'. Many medical studies have shown that even after adjusting for physical activity, sitting for long periods is associated with health risks like diabetes, cholesterol, BP, bone loss, heart disease etc. **However COVID-19 is forcing us into a sedentary lifestyle. Even after the lockdown, movement will be relatively restricted for some time, and work is likely to have a component of work-from-home with more instances of sitting in one place for a long time.** As the weeks pass, people are getting more aware of this.

In The WT LOCKDOWN STUDY:

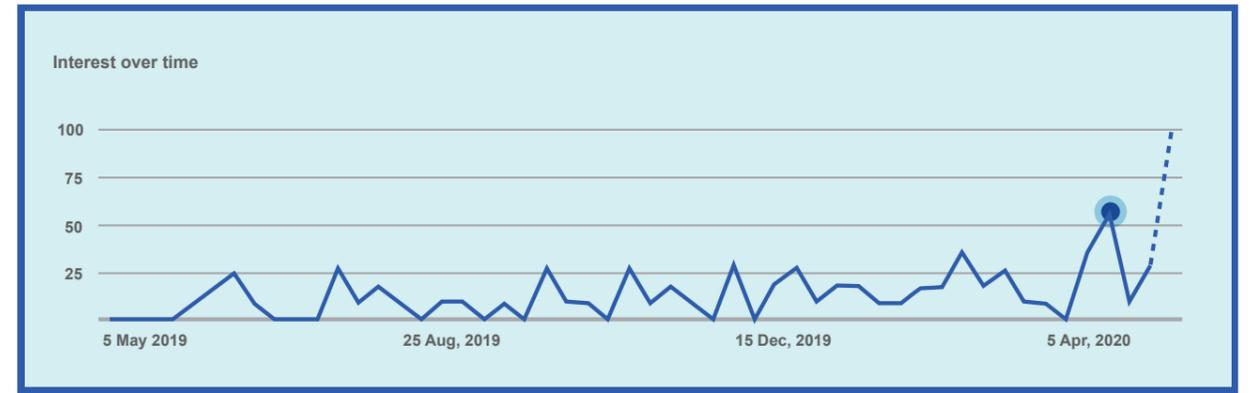
85% people agreed that due to COVID-19, they and their families were spending more time sitting in one place every day.



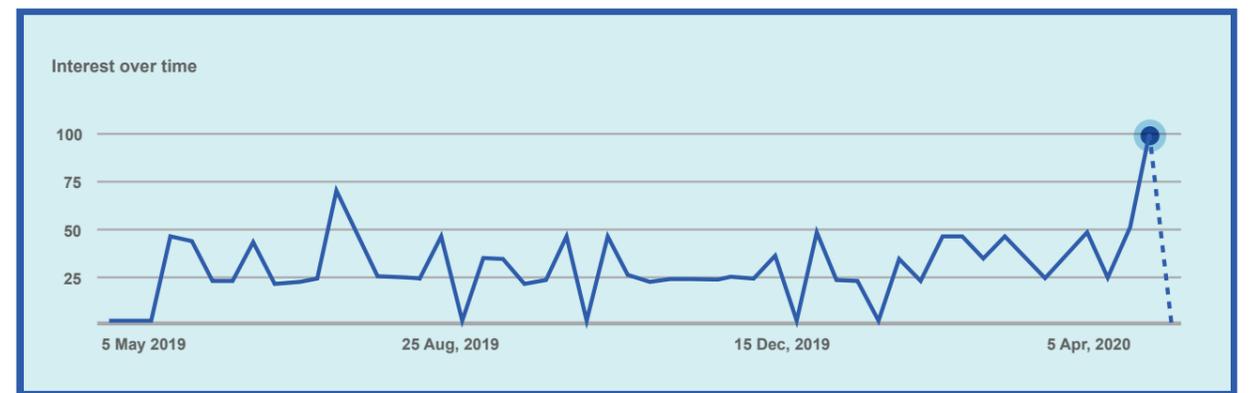
It's no wonder then that with the fear of getting infected becoming a transient normal, people have now started feeling apprehensive about the impact of their forced inactivity. Google Trends shows that searches for 'sedentary lifestyle' have shot through the roof, as have the searches for 'sitting exercises' and 'walking in the house'.



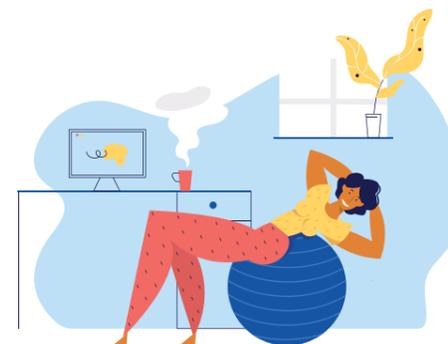
● Sedentary Lifestyle



● Sitting Exercises



● Walking in the House



But what is even more worrying is that specific complaints arising out of sedentary lifestyles, are surfacing.

In The WT LOCKDOWN STUDY, we found various symptoms and anxieties cropping up:

77% people felt that the forced inactivity creates an increased risk of blood sugar and cholesterol levels rising.

65% worry that more time spent indoors, even after lockdown, will increase Vitamin D deficiencies and risk of osteoporosis.

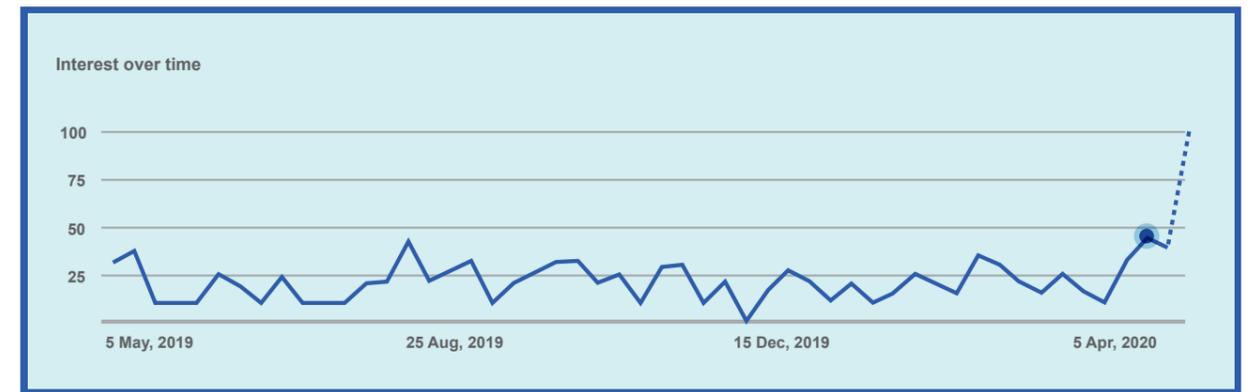
57% say they have actually experienced increased instances of shoulder pain or back pain because of sitting in one place.



This is corroborated by the surge in Google searches for 'shoulder pain'. But even the larger worries seem to be catching on, as is evidenced by the spike in searches for 'heart exercises'.



● Shoulder Pain



● Heart Exercises

These sedentary ailments come at a time when people are paranoid about going to hospitals because of the possible risk of Coronavirus infections. As per an India Today report, hospitals are seeing fewer heart patients because people are scared of contracting COVID-19. The report states that many patients are trying to suppress symptoms and are not reporting mild heart attacks. At a time when we need to be our strongest, staying inside is, in fact, making us weaker.

WHAT MAKES THIS RELEVANT

India is already a country with more than its fair share of lifestyle ailments, be it diabetes, hypertension, cardiac problems or even obesity. Any added numbers further burden the already stretched healthcare system. Not only that, but they further chip away at the immunity of the person. We need a big movement to contain and resolve sedentary ailments, without waiting for sedentary lifestyles to go away.

The other question is that of the elderly, who need cocooning. Even after the situation reaches a transient normal, they would still do well to avoid crowded places like parks. However, this is also the segment that is most vulnerable to ailments like diabetes and cardiac ailments, which carry physical activity as part of their prescription. This might require a re-look at the treatment programs for older patients, that allow them to stay healthy, considering their present circumstances.



20
HEALTH
LINES

India has always been a country of extremes, but there was one extreme that stood out in 2019. In the same year that an ET Brand Equity feature forecasted India's luxury market to grow 10-15% in three years, the World Economic Forum downgraded India to an abysmal 150th rank on health and survival.

COVID-19 has served to highlight the pressing requirement on health, and the marketing community is now coming together to address emerging needs in healthcare. The Vedanta Group has committed Rs.100 crores towards fighting the pandemic. ITC is creating a fund to assist the district and rural healthcare ecosystem that reaches out to the weakest sections of society. There are many other such 'health-lines' that brands are extending to take care of health needs.

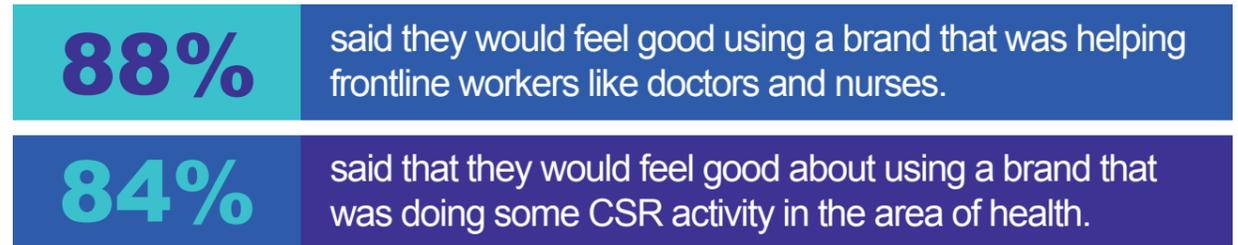
Many brands are helping with health supplies and support. Unilever is donating millions of Lifebuoy soaps to the underprivileged, Mahindra & Mahindra offered its manufacturing units to make ventilators, while the Mukesh Ambani Group pledged to produce 1 lakh masks every day for health workers. PepsiCo India has committed to provide 25,000 COVID-19 testing kits, while Diageo announced plans to donate 5 lakh litres of Extra-Neutral Alcohol to the sanitizer industry. Many Taj Group properties have opened their rooms to accommodate doctors and nurses who are treating patients infected with COVID-19.



An interesting sub-set of this are the brands who are focusing on the healthcare needs of employees and partners. IOCL has pledged to cover its petrol pump attendants, truck drivers, LPG deliverymen and other frontline workers under a medical insurance policy. J&J has rolled out a global telemedicine program to help their employees with their physical and mental health. Uber India has committed to provide grants of Rs. 25 crores to support its driver-partners in the crisis.

All these efforts are creating an overall appreciation of brands contributing to healthcare.

As per The WT LOCKDOWN SURVEY:



This is also trickling down to individuals getting motivated to do what little they can to help. The Outlook COVID-19 Good Samaritans series covered stories like that of Dr. Maheswaran who offered his entire hospital, near Coimbatore, and its services free of charge for admitting and treating Coronavirus patients.

An article in The Hindu covered a team of youth who supplied medicines to patients in remote villages in Kannada during the lockdown. They would take requests on WhatsApp and supply the medicines, dividing the transportation costs among themselves and even taking on the medical bills of the very poor. It may be a bad time out there, but we are seeing more glimpses of good than ever before!

WHAT MAKES THIS RELEVANT

This trend can have huge impact for all CSR initiatives going ahead. Already the Government has sent a notification that says that investing in COVID-19 efforts counts as a CSR activity. This gives India her best chance of taking healthcare to the weakest and most underprivileged sections of society. This will also be driven by the growing appreciation that people will have for brands that are working to serve their health needs in a way suitable to them.

As brands start looking for their value propositions in a post-COVID world, it will be interesting to see if 'do-good' value becomes a permanent aspect of brand value. And the overall gainers might be India's healthcare infrastructure and the weakest members of society.



21

HEALTH

HEROES

Mattel recently launched a line of special-edition frontline worker toys. Leading the pack were doctor and nurse figures. This was accompanied by the line: A new kind of hero has arrived!



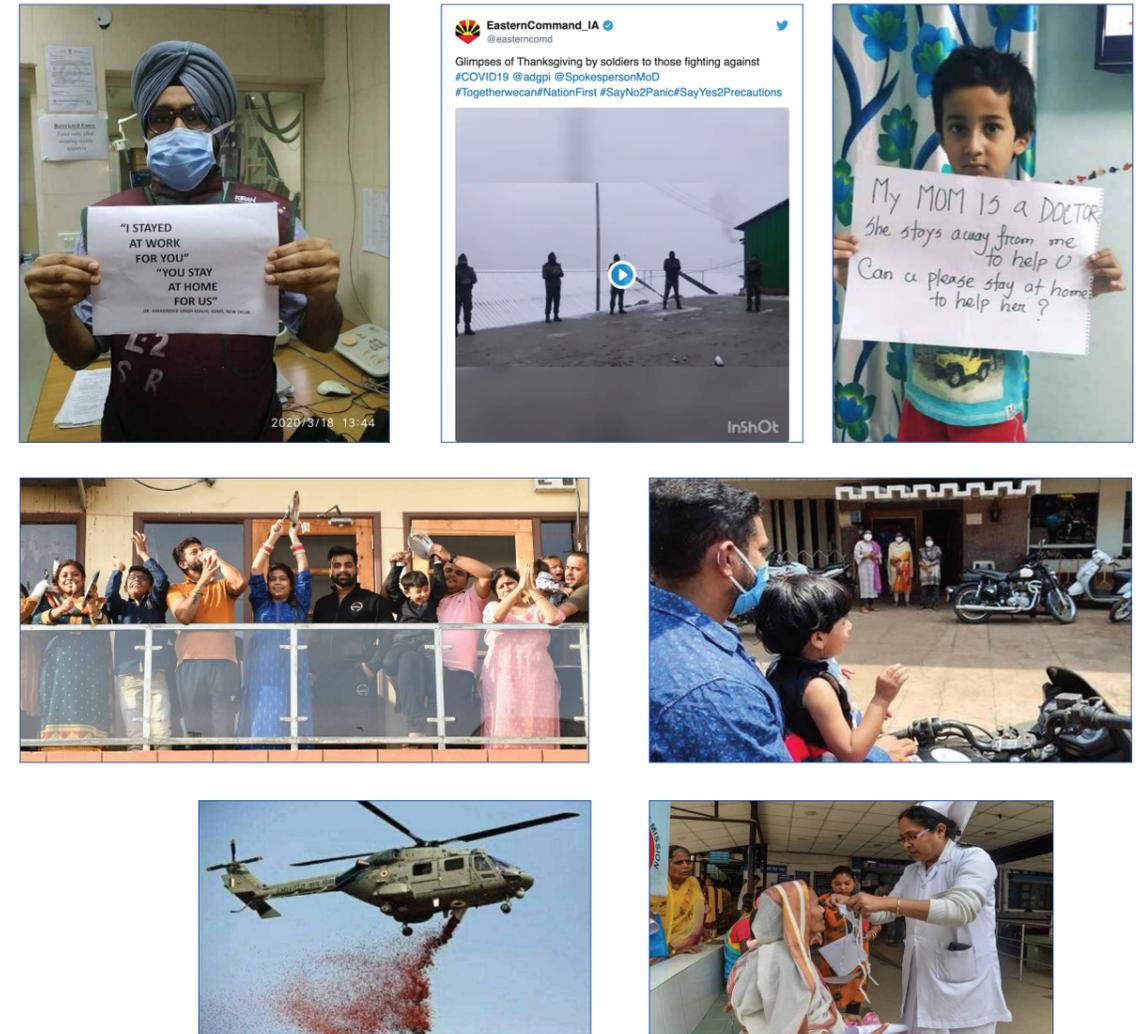
Every category has its heroes. The beauty category has its stars, the IT category has its inventors, you have celebrity chefs, celebrity entrepreneurs, sports stars. The pharma category has had experts, but it never actually had heroes.

Today, healthcare professionals have emerged as frontline warriors, putting their lives at risk, keeping their families at bay, fighting attacks and social ostracization as they fight to save people from COVID-19.

The government recently recognized this when they announced Rs. 50 lakh insurance covers (per person) for doctors, nurses, paramedics, sanitation staff and Asha workers. Indians across strata, united to cheer for them in the 5Baje5minute initiative. Cadbury changed its logo for the first time ever in India, to say 'Thank You' to the unsung heroes. Even the army warriors took to the air to celebrate health warriors. So far, the role of doctors has remained within the traditional realm. We saw their role expand, as many doctors took to social media to ask people to stay home. Clearly, the pharma sector has got its new heroes!



Health heroes reported in different media:



WHAT MAKES THIS RELEVANT

The expanding role of doctors is an interesting development that might continue in the time to come. Will doctors step forward to have a larger POV on health, hygiene, nutrition, healthy lifestyles, healthcare facilities, and will we listen to them more closely now? Will we see the emergence of star doctors, who command a fan following for their advice?

The other interesting question is whether we will see more brands coming up with products from insurance to fashion to wearable tech, designed specifically for healthcare professionals? Watch this space for more!

CLOSING COMMENTS



TARUN RAI

Chairman and Group CEO,
WT South Asia

“ There is no doubt that the COVID-19 pandemic is unlike anything we’ve seen before. And unlike some of the crises we have witnessed in the past few decades, this will have a much deeper impact on not just the economy but also on society. There is an urgent need, therefore, to rethink, relook at emerging data and reload for the future. This health & wellness category report is our attempt to do just that. We hope it helps our partners to navigate through this crisis and come out stronger as they emerge into the post-COVID world.



AJEETA BHARADWAJ

National Planning Director,
Wunderman Thompson

“ The COVID-19 pandemic is making structural changes in mindsets and marketplaces, alike. It is changing the hierarchy of benefits and crash-coursing the education of certain categories, it is forcing a rethink on the way things are made, stacked & served and digitizing behaviors at a scale that would have been hard to imagine. 21 Times Health is an attempt to identify these shifts and the opportunities emerging from them, so that brands can reconfigure their relevance and emerge stronger.

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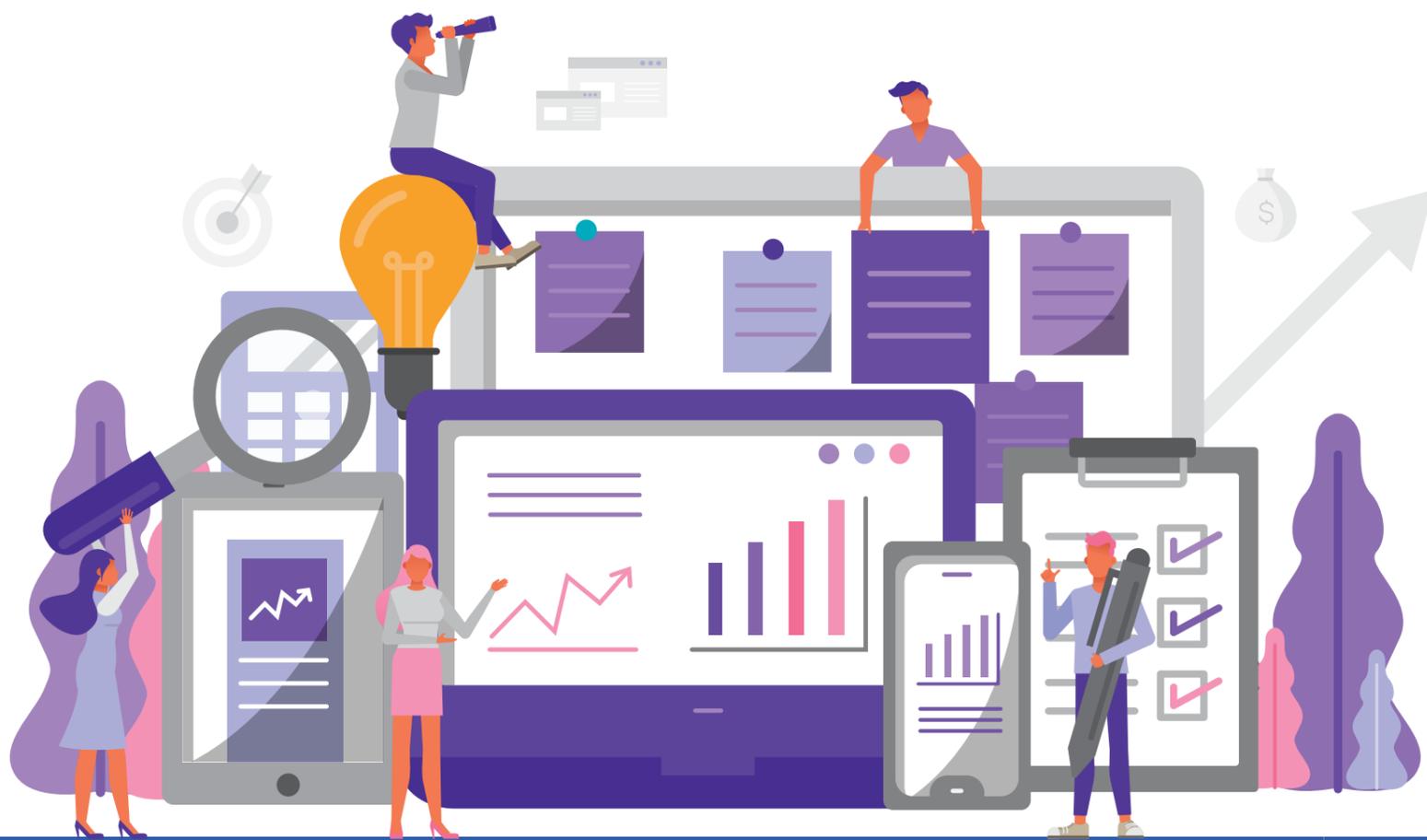
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