

healthcare now | Unique insights to navigate a complex market

#3

When  
Reality Bites



# About Healthcare Now

**Rooted in research and insight, essential provocation for brands and businesses in the health & wellbeing space.**

**We've got a long history of helping brands navigate the complex sphere of healthcare.**

The main challenge used to be regulatory compliance, but today there are so many more factors to consider. It's a landscape completely changed by events of recent years and that change is constant...and happening quickly.

As two entities working across the full spectrum of health & wellbeing, from common ailments to rare diseases, Bray Leino and Solaris Health are in a unique position. In 2022 we came together to commission independent research agency QuMind to conduct a nationwide healthcare study

of 1,000 respondents across both consumer and core patient groups\*. This exclusive, quantitative and qualitative research study – State of the Nation Wellness Report – unlocks previously unattainable insights to power healthcare marketing, now.

Through our programme of thought-provoking content, we'll reveal the beliefs and experiences that are shaping health attitudes and behaviours. From consumer and patient insight, we'll explore human perspectives and derive potential implications for brands and businesses navigating this space. Ultimately, we set out to see the world of healthcare through the eyes of those that matter.

\*Those in primary care for with an ongoing medical condition and those with an ongoing chronic/rare medical condition.





# Core insight:

## Rising self-sufficiency is driving an independence from traditional sources of ‘authority’

To understand consumers and patients today we need to understand the world they live in – the macro cultural factors impacting their attitudes and behaviour...

### Things aren't all that easy at the moment.

The biggest cost of living crisis in recent times is upon us. We're still navigating the post pandemic 'new normal', whilst other viruses emerge and the healthcare system is under strain as we battle with health issues that potentially festered during the pandemic. The conflict in Ukraine brings a backdrop of troubling unease, inflation is spiralling and public sector workers (including those across a spectrum of health services) are making their anxieties and frustration known.

We're surely living in unprecedented times and it can be hard to see a brighter horizon. All of this, and more, is taking a toll on our health and wellbeing.

This instalment of our Healthcare Now series examines the impact that these macro cultural factors are having on our health, from both a physical and mental health perspective, and how this challenges our ability to take a more proactive approach to healthcare.



## + Patient groups and consumers feel differently

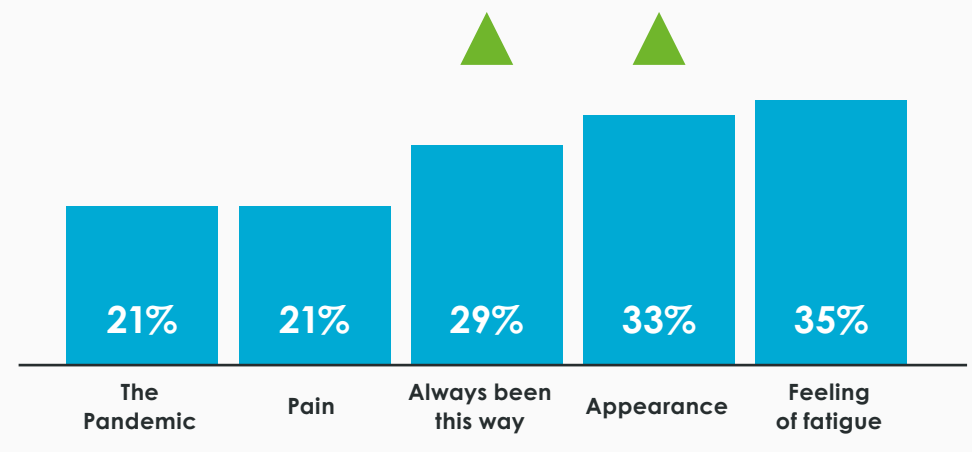
From our research we know that generally, people claim to prioritise their health and wellbeing, with 1 in 3 saying it's a top priority.

Taking a more proactive role in health is triggered by different reasons across core audience groups:

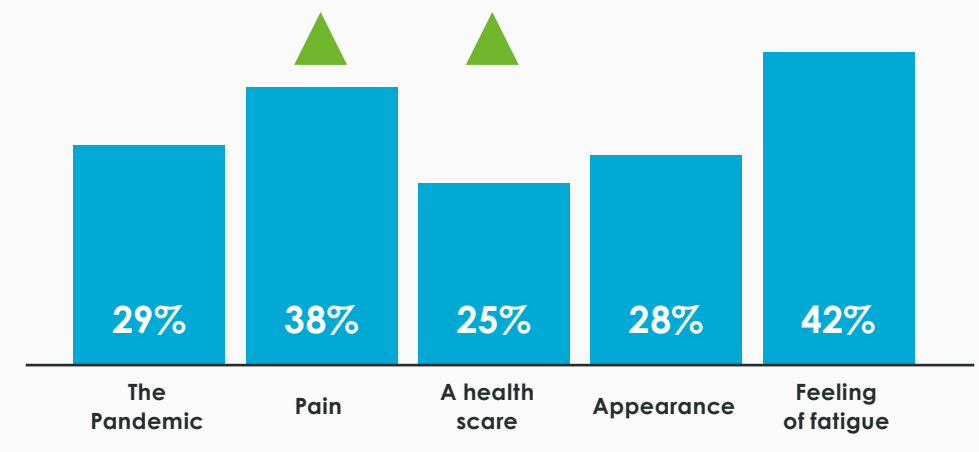
- Consumers are much more proactive in exercising, consciously eating, and sleeping well than the other two groups. They under index in taking medication and doctor check-ups.
- PGA are less interested in feeling calm and relaxed but over index in their desire to prevent the onset of medical conditions. PGA are also more likely to research their health (incl. DNA or family history) search for additional information about their health.

- PGB over index in their desire to feel calm and relaxed about their health.
- All three groups want to feel fit and strong, for as long as they can. However, the single biggest challenge to prioritising health and wellbeing is life itself. Our survey revealed a massive 43% of people feel they can only take a proactive role in their health and wellbeing when "life allows them to". And 'life' now certainly looks very different to a few years ago.

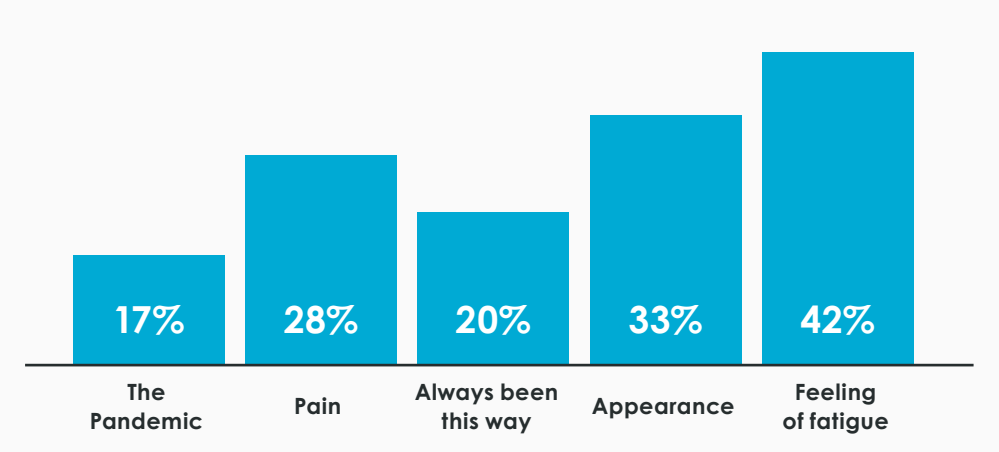
Top 5 triggers for managing health and wellbeing proactively  
Consumer group



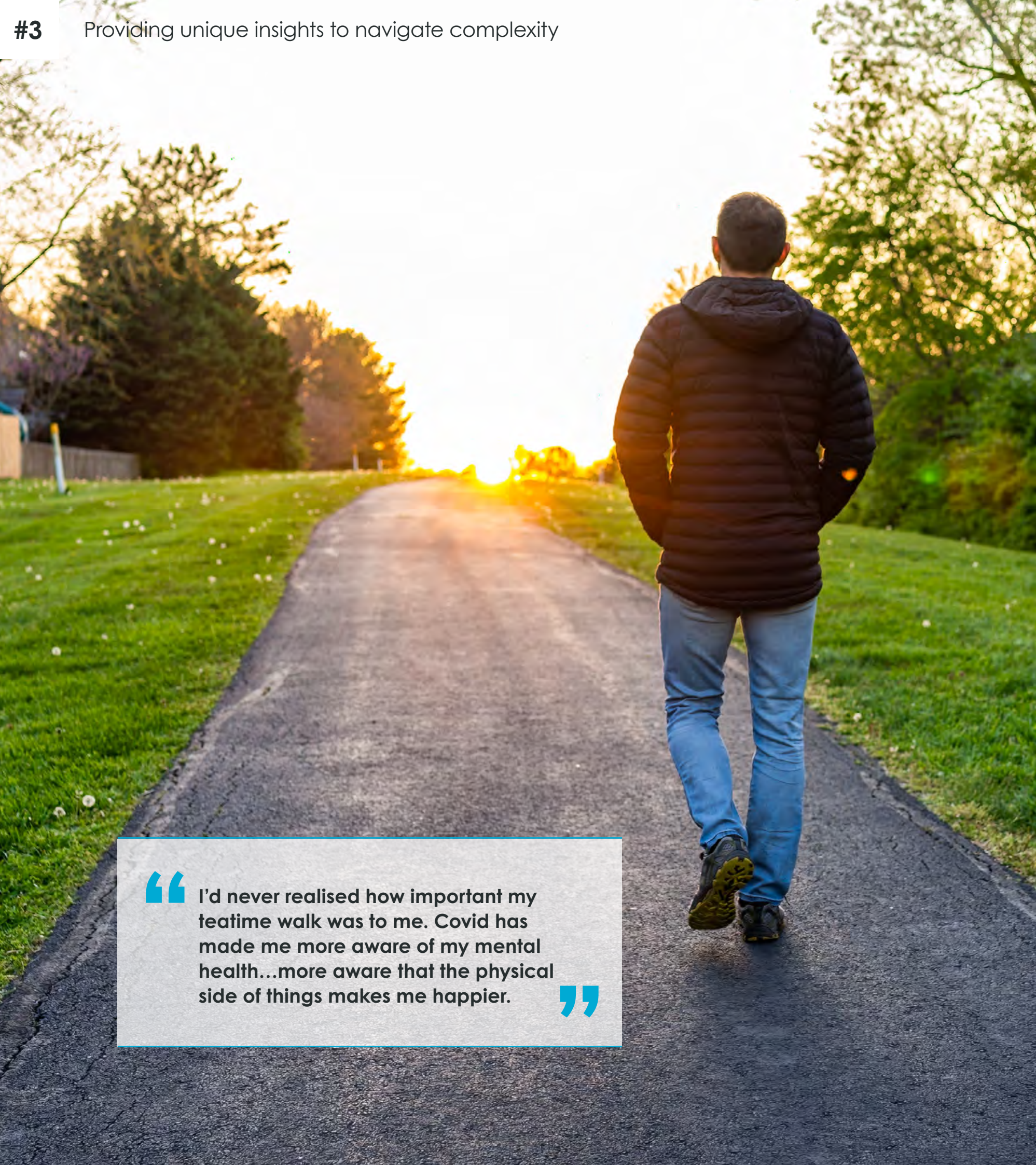
Patients with severe and rare illnesses with unmet medical needs



Patients with less severe illnesses



▲ ▼ significantly higher or lower at 95% confidence level vs. both other segments



“ I'd never realised how important my featime walk was to me. Covid has made me more aware of my mental health...more aware that the physical side of things makes me happier. ”

## + The lasting legacy of Covid-19

Throughout the Healthcare Now series, we've tried not to put too much focus on Covid-19, with so much already reported and research ongoing. But, undeniably, the legacy of Covid-19 is still having a significant impact on how we manage our health; not just physically, but mentally and emotionally too.

### **For some, Covid-19 became a catalyst for lasting change with regards to physical health**

For 23% of people, Covid triggered them to take a proactive approach to their health and wellbeing.

Physical exercise has become even more essential to people's lives, with lockdowns and home-working encouraging people to pro-actively incorporate physical exercise or fresh air into their routine.

This behaviour has continued beyond the pandemic, with 57% of people 'regularly' partaking in some form of physical activity to look after their mental health and wellbeing.

At the height of the pandemic, fear of catching Covid prompted people to take action by assessing their own immune system and taking supplements to strengthen it. The research revealed that 33% of people are now taking supplements to manage their physical health.

“ I started taking Vitamin C to boost my immune system during Covid ”

“

I used to take a **multivitamin** but I've started taking **vitamin B and D** since Covid

”



## + The NHS crisis is causing a drive for self-sufficiency in the healthcare space

We're seeing the impact that an increasingly overwhelmed NHS is having on our health, in terms of both attitude and behaviour. With people not wanting to be a burden on an already overwhelmed NHS and struggling to get appointments when they need them, many are now self-diagnosing and treating at home rather than going to their GP.

This attitude is even more prevalent amongst a 55+ demographic, with the older generation being more likely take responsibility for their conditions – some due to mistrust/lack of faith in NHS; others don't want to be a burden. And with the lack of hospital beds, delays to non-urgent surgeries, lengthy ambulance waiting times and strikes by ambulance staff and nurses flagged daily in the news, this trend is likely to continue. The message within all of that being that a degree of self-sufficiency is required, even in a health emergency – let alone in the passage of daily life.

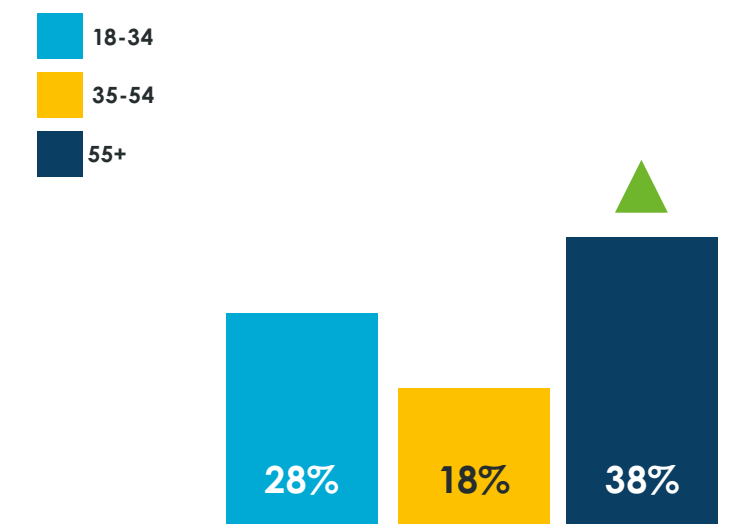
“ I haven't had an x-ray now within three years so chasing that up is something I have to do on my next day off. I used to have a lot of consultations before Covid...that's all sort of finished. ”

“ I could call the doctors but, they don't know too much about my condition. ”

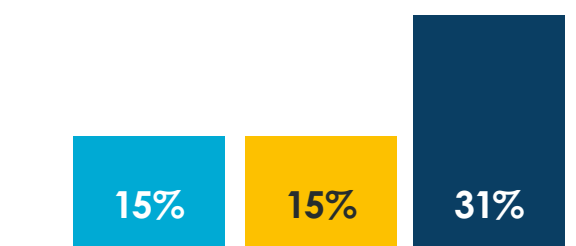
“ Unless you're at death's door they're reluctant to give out appointments and, even then, would suggest 111 or A&E. ”

“ I know how busy they are and don't want to waste their time. ”

“ I suppose with rare diseases it's a bit awkward sometimes, that's probably why I find it easier to talk to people on the Facebook groups because we know what we're on about to each other. ”



I don't want to be a burden on the already stretched NHS



I feel like I will manage my condition more quickly than relying on our healthcare



Photo by Julian-Hochgesang on Unsplash

## + The rising cost of health is prompting a shift from thriving to surviving

Our research shows that people are concerned about maintaining a healthy lifestyle in the face of rising costs. The important thing to note here is that we're moving away from language around 'health' and 'wellbeing' and towards 'healthy' and 'lifestyle'. This alludes to a recognition that the biggest impact of the rising cost of living will be to day-to-day life, where we'll see the focus switching from thriving to merely surviving.

**Inflation is impacting people's food buying habits and healthy purchases are the first to be sacrificed.**

“ I don't eat fruit and veg at all now... It's expensive ”

“ I can't afford supplements, they're really expensive ”

**Physical and leisure activities have become more muted.** People are becoming less spontaneous and are cutting back on things they enjoy doing (e.g. leisure activities). The potential impact here, of course, is on mental health, as more enjoyment and 'feel good' is compromised or sacrificed altogether.

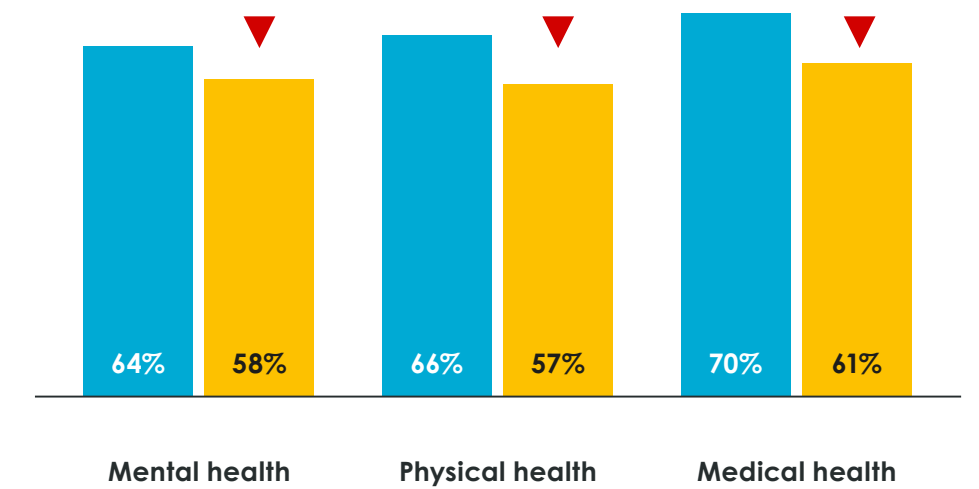
“ Yeah, we're cutting back a bit on things... instead of taking the kids to a theme park, we'll go to a museum which is free of charge, or go for a walk in the park. ”

“ The gym is too expensive – if I wanted to increase exercise, I'd think about what could I do cheap or free. ”

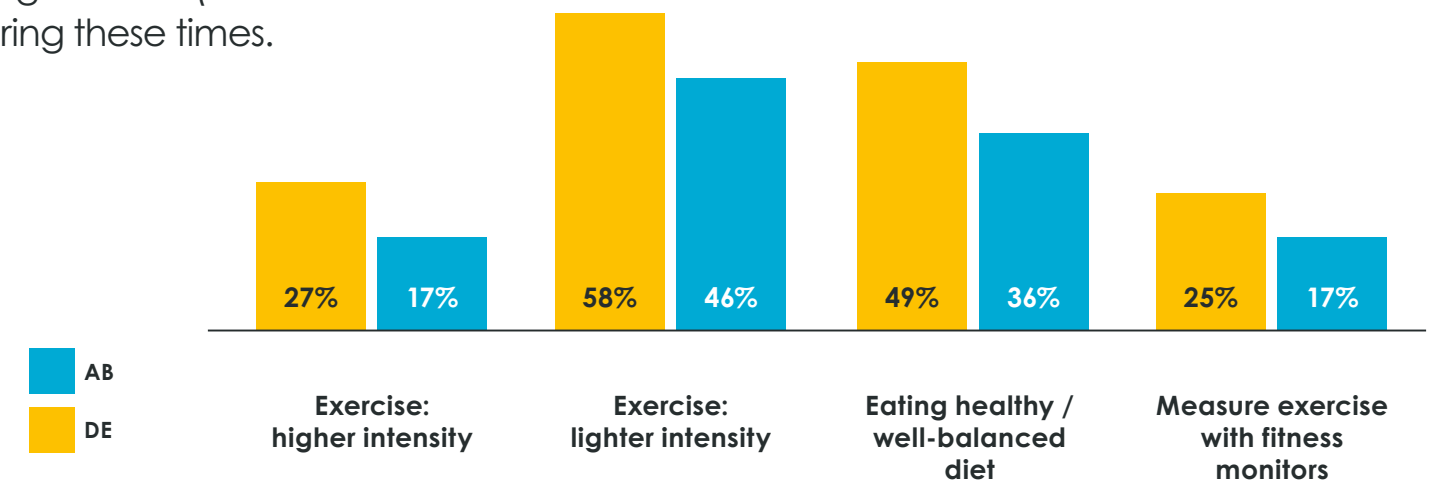
**Proactivity towards health within lower social grades is particularly suffering from both an attitudinal and behavioural perspective.**

The cost-of-living crisis is clearly having both a short and long-term impact on maintaining a healthy lifestyle. It goes without saying that any brands and businesses operating in this space need to ensure that communications are sensitive, sympathetic and understanding of the difficulties people are facing, offering information, support and guidance (where relevant) during these times.

NET proactivity in managing health and wellbeing



Actions for managing health





# Our conclusion:

## Despite challenges, people are taking control and brands need to take note

---

For a host of reasons, people are clearly taking a more proactive role in their health and wellbeing, becoming increasingly independent from the traditional 'established' sources of 'authority' in healthcare. This shift towards a greater engagement with personal 'earned' authority sources will undoubtedly impact the established customer journey touchpoints that we typically take comfort in as marketers.

---

The core challenge is how brands react to this shift and position themselves as a credible 'go-to' source of ongoing support, advice and potentially even treatment in a distinctive, yet meaningful way.

It is often said that brands that flourish walk the walk, not just talk the talk, but becoming ever critical to this is understanding the permissive role that your brand can play in the crisis. Getting it wrong could prove costly.





# Summary

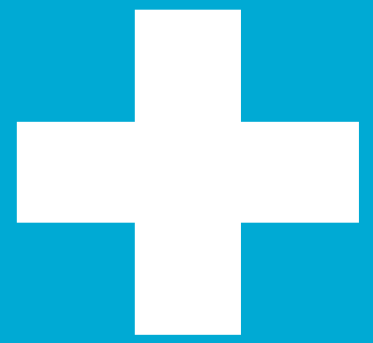
---

## Core Insight:

Rising self-sufficiency is driving an independence from traditional sources of 'authority'.

## What this challenges:

The importance of (and reliance on) those established influences in creating meaningful brand relevance and distinction.



# Nuggets and numbers

## For many people, life gets in the way of establishing and maintaining healthy habits

**22.2m** people claim to prioritise their health and wellbeing 'when life allows me to'.

**c.1m** people in the UK say that their health and wellbeing currently can't be a priority due to their lifestyle.

## Many people adopted healthier habits of the back of the pandemic.

**23%** of people stated that Covid triggered them to take a proactive approach to their health and wellbeing.

**33%** of people stated that they are taking supplements to manage their physical health post pandemic.

## The rising cost of living could impact healthy food choices.

**59%** of households fear the cost-of-living squeeze will leave them with less to spend on food in the future.

**One in five** households said they have already faced a 'heat or eat' dilemma.

# Points of view

Unique perspectives on the core insight



## Michelle Riddalls

Chief Executive – PAGB, the consumer healthcare association

Self-care can play a vital role in protecting the over-stretched NHS, we know that the public want to embrace self-care but need the tools and infrastructure to help them to do so.

The consumer healthcare sector can help this growing self-sufficiency by increasing the access to effective medicines, where data shows they can be used appropriately and effectively without intervention from a doctor. PAGB is working with Government to look at where this is possible. Reclassifying a medicine – making it available over-the-counter without a prescription – empowers people to self-care, alleviating demand for NHS services. That's why we're calling for a renewed ambition on reclassification which ultimately will benefit individuals looking to self-care by giving them more choice to quickly relieve the self-treatable conditions.



## Anna Donaghey

Strategy Director – Bray Leino

The key question is 'what is the role of the brand?' Brands that fulfil a clear and valuable role in their audience's lives, beyond the transactional, can thrive through a crisis. But brand owners need to understand the shifting priorities and mindset of their consumers, identify their needs, and think creatively in terms of how the brand can respond. 'Big thinkers' embrace the challenge of how their brand can actually help the society in which it exists.



## Steve Chambers

Media Director – Bray Leino

Increasing consumer proactivity means more opportunities to reach a potentially receptive audience. Consumer journeys weren't ever linear but are likely to become even more fragmented. What's more, these proactive consumers will be looking for reliable, authoritative advice – this might come from trusted media, providing contextual opportunities for brands, or potentially from the brands themselves, through owned, earned and paid for channels (PR, Social, website...). Marketing teams should increase investment in brand building media to help develop all-important trust, along with saliency and awareness. The recent news of Boots store closures following on from Lloyds, only underlines this as brands will have less chance of in-store exposure.



# Contact us

---

For more information on how we can help drive growth for your your health & wellbeing brand, contact Sam Crocker  
[scrocker@brayleino.co.uk](mailto:scrocker@brayleino.co.uk)

