



Beyond COVID-19:

Toward a Healthy Future

How the global pandemic is reshaping
what the world values

May 2020

geneagency.com

Gene

The COVID-19 pandemic has dramatically shifted the narrative on how society consumes, interacts with, and values health and well-being.

In the same manner, we now have an undisputed obligation to change the way we position health as it relates to the different aspects of our lives—from consumer habits and self-care, to our work lives and mental well-being—in order to ensure a healthy future for everyone.

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Why Now?

Just a few months ago, no one could have predicted the extent of the effect of COVID-19 on the world. Fast forward to today, and entire countries are under lockdown in a bid to limit the spread of the virus. The pandemic has pushed the limits of healthcare systems around the globe and completely changed the way we approach health. It has also shed much-needed light on a universal truth: health is what matters most.

It's not “business as usual” anymore

Today's reality is affecting how the future of health will be shaped, which is why we place significant emphasis on the work we do, so that it has impact beyond profit and helps to bring about positive change. For us, health is a value, not a vertical.

We believe that health brands must be designed with this value in mind, empowering every interaction within the experience continuum, physical or digital, for all the relevant audiences.

That is why we strive to work with brands and companies who share our vision and are receptive to incorporating innovation into their solutions. Through this approach and our impact-driven framework, our ultimate goal is to work with others to contribute to a future in which health truly matters to everyone.

**In these unprecedented times, health is what matters most.
For us, health is a value, not a vertical.**

Consumer Health and Self-Care

There is no doubt that COVID-19 has completely transformed the world as we know it, with the global economy and healthcare being the hardest hit during this time. On the other hand, consumer health—while also feeling the heavy impact of the pandemic—is undergoing a transformation as a result of the virus' spread, stimulating consumer interest in health and self-care like never before.

Prior to the pandemic, many companies were already leading the way with innovative and virtual self-care and health-focused solutions. According to the Global Wellness Institute, the global health and wellness industry skyrocketed to \$4.2 trillion in 2017, being driven by clean eating trends, the personalization of health and wellness through wearables and virtual assistants, wellness travel, and Amazon. Consumers were not happy with just feeling better and they began to rely on devices and apps to confirm that they were putting in the work.

And while the consumer health industry has been an evolving one for quite some time, the pandemic has heralded in a new era of advanced evolution within the digital and virtual spaces. In response to the crisis, the digital world has introduced even more opportunities for people to continue to promote their own health while social distancing. Consumers now have access to a multitude of different online services and devices that are meant to replace the actions of going to the gym or their favourite fitness class.

During this time of crisis, consumer health companies now have the opportunity to pave the way as leaders in the health and wellness space by acknowledging and responding to the fact that consumers are more in tune with their health and well-being than ever before.

Insights: Pre-COVID-19

The modern consumer is more informed about their own health and well-being, increasing the demand for more accessible and innovative health-related resources.

\$4.2 trillion

was the estimated value of the global wellness economy in 2017 according to the Global Wellness Institute

49%

of people in the U.S. owned a wearable device in 2018 according to a PricewaterhouseCoopers report

\$3.6 billion

was generated in revenue by the digital fitness industry in 2019

- The health and wellness industry has become heavily influenced by technology, with the focus shifting away from the actual self—our bodies, minds, and spirits—and toward data about the self.
- At the same time, consumers' efforts to be on fire all the time—personally and professionally—are causing many to burn through their mental and physical reserves. Amid a growing focus on well-being and an epidemic of exhaustion, individuals and employers are finally confronting their demanding lifestyles and unrealistic personal standards. This shift has compelled brands all over the world to wage a battle against burnout.
- The Journal of Consumer Research has published research showing that Americans associate busyness and stress with prestige and status.
- 2019 completely changed the scope of at-home fitness by addressing the limitations of its predecessors. New industry players designed interactive platforms intended to grow with users.

Insights: Pre-COVID-19

“Retailers have been feeling the pressure to move to the virtual marketplace for years. COVID-19 could be the crucible through which the next era of Canadian retail will be created.”

Michael Burt

Executive Director, The Conference Board of Canada



- Startup Smart Health Clubs makes it easy for gyms to add tech features into their membership experiences through a platform that leverages the equipment gym members already bring with them—their smartphones—combined with other available data sources, including from their own IoT Smart Health weight pins, and cardio data from personal devices like smart watches.
- Leading platforms like Peloton (spin bikes), Mirror (guided free exercise), and Crew (row machines), prioritized both creating and integrating their workouts with the best fitness equipment on the market—bringing expert quality products into users' homes.

“Now, more than ever, it is a great time for brands to get involved in consumers’ daily lives. Though there is moderate concern, brands can still assure consumers with ways to prepare, prevent or treat amidst a wider spread outbreak. Brands are also stepping up to help consumers feel more at home, while at home.”

Mintel

Insights: Post COVID-19

The pandemic has forced consumers to turn to technology and virtual resources for health-related matters more than ever before.

80%

increase in overall e-commerce levels in Italy between February and March 2020, including a two- to three-times increase in click-and-collect purchases, according to analysis by McKinsey & Company

9.2%

increase in Peloton shares during March 2020, while downloads of its app were up five times in March compared to February 2020

16%

of adults in the U.S. had taken to using more online exercise videos in March 2020 due to social distancing and self-quarantining practices during the pandemic

- The industry is uniquely positioned to lead in this crisis, given the trust that consumers place in its brands and their reliance on its products for self-care.
- Consumers are increasingly sensitive to their personal health; as of April 2020, consumers report forming new behaviours to protect or enhance their well-being.
- According to an April 2020 Canadian Consumers Prepare for COVID-19 report by Statistics Canada, personal care and household cleaning products sales surge.
- According to a March 2020 study by Nielsen, consumers across Asia have signalled that they would rethink and re-prioritize the place eating at home has in their lives and that their eating habits may change permanently once the world moves beyond the impact of COVID-19.
- There is a global shift towards focusing on preventative aging measures as more people view beauty as a reflection of overall health.
- As more consumers take a longer-term approach to beauty and connect it to wellness, ingestible beauty will gain traction in the U.S., and consumers will respond best to products that are backed by solid research, transparent with their claims, or personalized to their unique needs.

Insights: Post COVID-19



- Consumers now have at their disposal a crop of connected devices meant to replicate the experience of going to the gym or attending a workout class, including Peloton's stationary bike, and Mirror, an innovative, wall-mounted, personal home gym device, to name just a few.
- E-commerce platforms will benefit further and achieve stronger long-term growth as more consumers buy products online.
- Wearable giant Fitbit announced that it's supporting people during the pandemic by offering 90-day free trials of its Fitbit Premium and Fitbit Coach services, which include more than 150 workouts, while Fitbit Coach allows users to stream workout videos on phones or computers.
- Physical retailers are acting quickly in the face of an unprecedented challenge. Off-the-shelf technology solutions, like Amazon Marketplace or Shopify, are a way they can quickly develop an online presence.

“(The) wellness market isn’t just growing, it’s extremely dynamic. We believe that the three sectors that represent the core spheres of life will see the strongest future growth—wellness real estate, workplace wellness and wellness tourism—while other sectors will also grow as they support the integration of wellness into all aspects of daily life. And wellness markets will become less siloed and more interconnected, converging to offer solutions and experiences in the places where people live, work and travel.”

Ophelia Yeung,

Senior Research Fellow, Global Wellness Institute

Insights: Post COVID-19

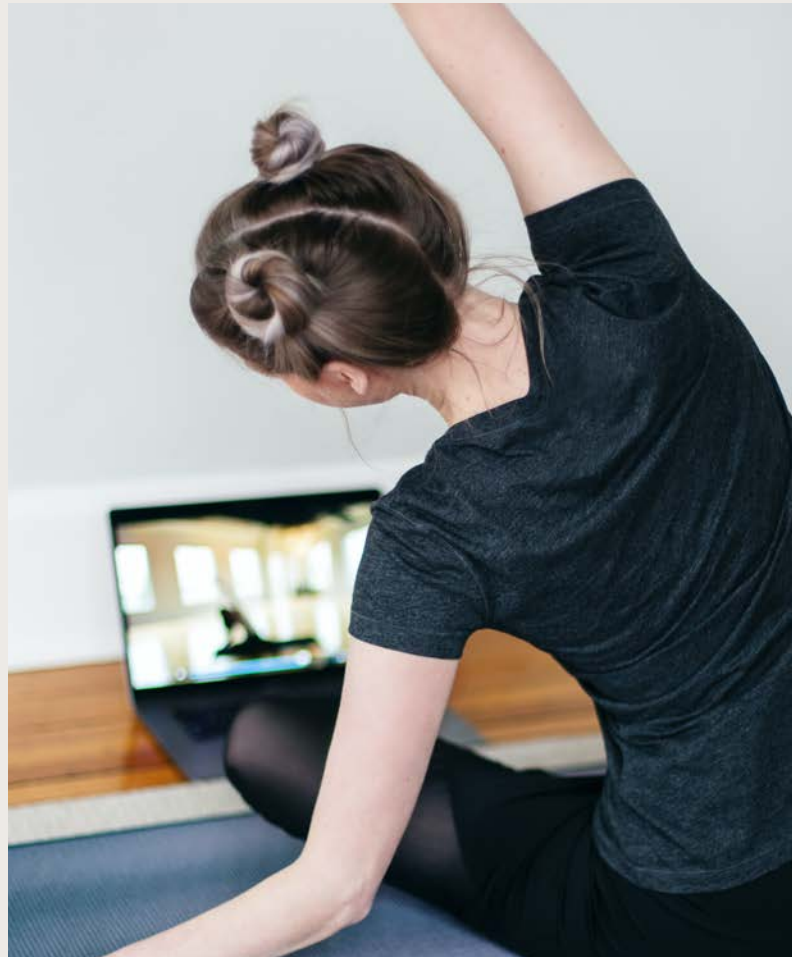
- Gympass, the corporate wellness company, announced that they are expanding access to their digital app with virtual workouts, nutrition plans, and other wellness lifestyle information.
- Globally, more people are attuned to preventing signs of aging and see beauty as a reflection of overall health. Alternative medicines like Traditional Chinese Medicine (TCM) and Ayurveda take a holistic view of well-being, centred on disease prevention and internal balance implemented with more natural measures as opposed to traditional Western medicine. Consumers in geographical regions where these practices have long been common are showing renewed interest. Individuals are becoming more open-minded, moving beyond more popular practices like yoga to embrace “New Age” approaches like astrology to improve their personal care routines.
- New data revealed that only a small number of people are wanting to return to life before the pandemic, showing a real appetite for change and for the world to learn from this crisis as people are trying new things and noticing differences, at home, in their work and in communities.

88%

increase in exercise by people who normally exercise 1-2 times/week in March 2020 according to a survey by RunRepeat

2,000+

pre-recorded audio and video workouts are now available for free on the ClassPass website



“Once upon a time, our contact with wellness was occasional: we went to the gym or got a massage. But this is changing fast: a wellness mindset is starting to permeate the global consumer consciousness, affecting people’s daily decision-making—whether food purchases, a focus on mental wellness and reducing stress, incorporating movement into daily life, environmental consciousness, or their yearning for connection and happiness. Wellness, for more people, is evolving from rarely to daily, from episodic to essential, from a luxury to a dominant lifestyle value. And that profound shift is driving powerful growth.”

Katherine Johnston,

Senior Research Fellow, Global Wellness Institute

Virtual Care and Telemedicine

Up until now, virtual care models—including remote and online health-related services and accessible healthcare—carried the promise of better health for all, but their potential was never fully realized.

In the wake of COVID-19, virtual care is needed more than ever before. As an ongoing global crisis, the pandemic has pushed for healthcare establishments and governing bodies to seek out other methods when it comes to providing healthcare while still protecting patients from the virus. The pandemic has also forced patients to stop going to their doctors' offices and instead, having to rely on medical care via online platforms, opening the door to a massive influx of virtual care and telemedicine providers.

These services are not only here to stay, but the demand for virtual care is likely to continue to grow as consumers become more dependant and comfortable around using it.

“Telehealth is bridging the gap between people, physicians and health systems, enabling everyone, especially symptomatic patients, to stay at home and communicate with physicians through virtual channels, helping to reduce the spread of the virus to mass populations and the medical staff on the frontlines.”

Dedi Gilad

CEO and co-founder of Tyto Care, a startup offering a handheld medical exam kit for use by patients at home

Insights: Pre-COVID-19

The concept of telehealth has been around for some time but hasn't been enforced to its fullest potential due to a lack of resources and infrastructure.

0.15%

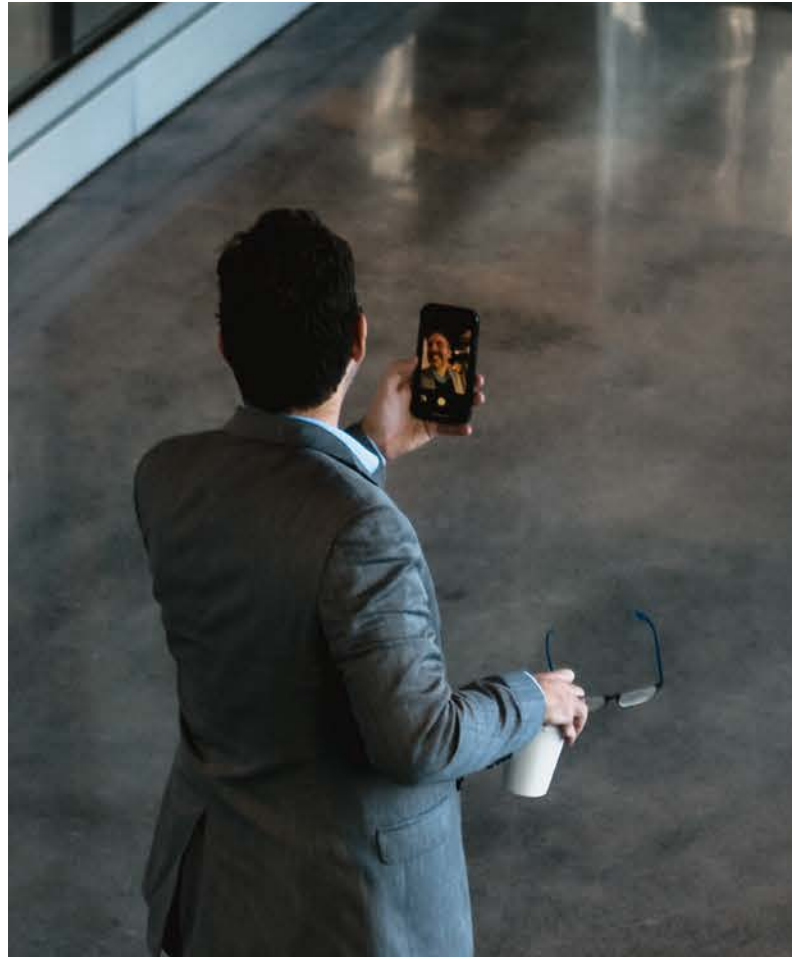
of all billable services represented by telemedicine in the Canadian health-care system in 2014

39.7%

of U.S. consumers said their health system or insurance provider didn't offer telehealth services in 2019

9%

of Canadian employers offered virtual healthcare services to their employees in 2018

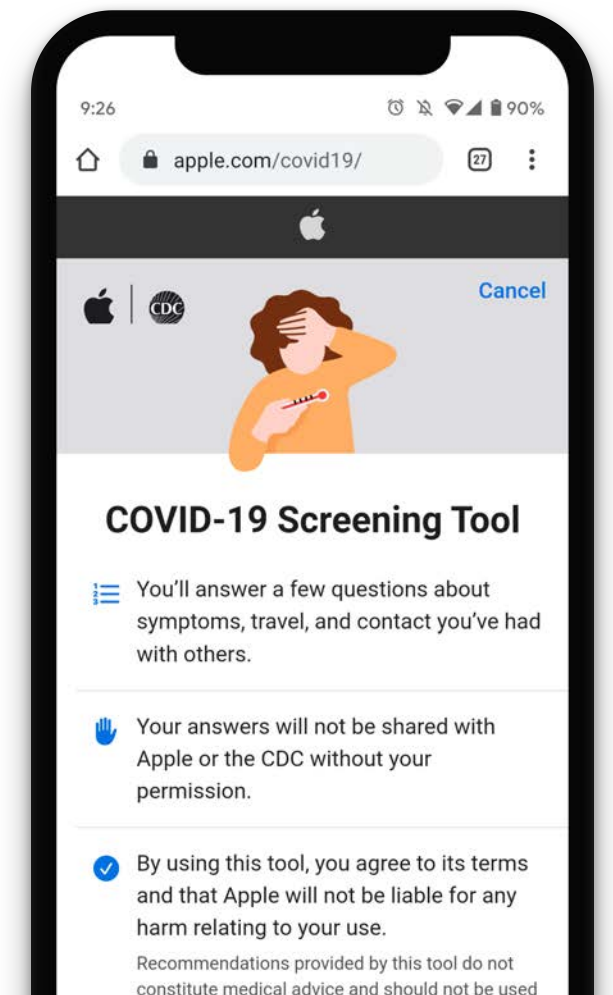


- Lack of proper infrastructure put in place to support virtual care models
- Lack of awareness surrounding virtual care models and slow adoption
- Cultural aspects were not taken into consideration when it comes to virtual care models

Insights: Pre-COVID-19

“The COVID-19 outbreak may be the right impetus for lawmakers and regulatory agencies to promulgate further measures that facilitate more widespread adoption of telemedicine.”

Kimberly Lovett Rockwell, MD, JD; and Alexis S. Gilroy, JD
The American Journal of Managed Care



82%

of consumers were not using telemedicine services in the U.S. in 2017

1 in 10

U.S. patients used telemedicine services in 2019

“ Finally, we, the ones who describe ourselves as 'digital natives' need to share our knowledge and skills to help to make e-health a viable and accessible solution for those around us. We are all in this together, and we can all contribute.”

Vasileios Nittas,

Epidemiologist, University of Zurich

Insights: Post COVID-19

Now more than ever before, people are relying on telehealth and virtual health resources to help them get through these tough times in a more convenient and safe manner.

100

new companies subscribed in March 2020 to Dialogue, a virtual care and telemedicine platform, providing access to 100,000 employees—compared to 700 at the end of February 2020

50%

increase in telehealth visits in March 2020 in the U.S. according to Frost and Sullivan

900 million

estimated coronavirus-related virtual visits for 2020 according to Forrester

4,300%

increase in telehealth use in response to COVID-19 via Therapy Brands, a telehealth provider in the U.S.



“The biggest challenge to virtual care or telemedicine is not technology, but rather an issue of governance, policy and workflow.”

Canadian Medical Association

Insights: Post COVID-19



- Remote consultation is becoming an increasingly attractive option.
- The effectiveness of telemedicine has been promising for many health areas, including diabetic care, dermatology and cardiology, allowing for high-quality remote care, while saving time and valuable physical space.
- Virtual care will lift the burden from existing healthcare infrastructures.
- Telemedicine will be increasingly combined with other technologies such as AI and wearables, enabling timely interventions and better quality of healthcare delivery.
- In April 2020, a University of Toronto engineering team created a computer 'the size of a credit card' that uploads patients' vital signs to the web and allows healthcare workers to monitor COVID-19 patients remotely, from a nursing station computer, or a smartphone.

Health at Home

With millions of people forced to stay home as a result of the pandemic, we're seeing a revolutionary shift in the way people approach health within the home setting. From a massive increase in the use of grocery delivery services, and a surge in the demand for smart home devices and wearable technology, to rethinking the way care is delivered to those who need it in the home, consumers are shifting their focus to how they can best adapt to the changing ways of practicing self-care in the home setting.

One thing that's becoming increasingly clear is that the pandemic is helping to advance the development and production of technological tools and services specifically designed for the home that may have been previously overlooked. The COVID-19 crisis is changing everyone's habits in very powerful ways.

“The good news is that as technology begins to infiltrate every aspect of our lives, it’s becoming easier and easier to optimize our living spaces and daily rituals to ensure that everything works towards the same goal: ensuring you—and your family—can live happy, healthy, long, independent and fulfilled lives.”

The Telegraph

Insights: Pre-COVID-19

The last few years have seen technology dominate in the home, paving the way for new modes of delivery for health-related products and services.

141 million

voice control smart home devices shipped worldwide in 2019

85 million

smartwatches were sold in 2019, compared to a predicted increase to 137 million in 2022 according to CCS Insight

32%

of consumers owned a smart speaker, like an Amazon Echo or Google Home, in 2018 according to an Adobe Analytics survey

\$2 billion

is the estimated value of the home healthcare industry in 2019

- The market for home care services administered by the private and public sectors continues to expand as the number of older adults and people with multiple complex medical and social needs grows in the population.
- Technology is driving innovation in the home healthcare industry, and some of the technologies that are expected to revolutionize home healthcare in the next few years include sensors that can constantly monitor critically ill patients without the constant presence of a caregiver.
- In 2019, it was predicted that caregiver engagement would be a key differentiator for agencies; that there would be increasingly blurred lines between clinical care and personal care; and that virtual care and remote monitoring, which long seemed to be just out of reach in the future, would finally start to be considered an important element of servicing home healthcare.

Insights: Pre-COVID-19

“A smarter home can be a safer home. Greater emphasis and understanding, and above all, a change of habit and experience in moving away from physical actuation toward using voice in the home will support greater smart home expansion throughout individual homes.”

ABI Research



- Home glucose testing has been allowing consumers to monitor blood sugar level and adjust diet or medication accordingly, without having to make frequent lab visits or risking precarious highs and lows in blood sugar levels.
- According to a 2019 survey from Comscore MobiLens Plus, U.S. smart speaker owners were already using their devices to ask general questions, stream music and get updates on sports, traffic and weather, among other things.
- Shopping for food online was seen as a far-fetched concept by many just a few years ago.
- With air quality posing a real threat to the well-being of many, consumers have been investing in tech designed to improve surrounding air quality, with everything from robotic air purifiers sensors and air purifying curtains, to air pollution nose filters.

**“Advances in testing technology—
and changing attitudes towards patients’
responsibility for their own healthcare—
have made home testing a worldwide,
billion-dollar-and-growing market.”**

American Association for Clinical Chemistry

Insights: Post COVID-19

The pandemic has forced people to rely more on online delivery services, new technology, and virtual resources, changing our views on the meaning of health at home.

30%

growth in smart home voice control devices predicted for 2020 as a result of COVID-19

9%

of Canadians are now shopping for food online for the first time

218%

increase in downloads of Instacart in the U.S. over one week in March 2020

20%

of all food predicted to be sold online or through apps, restaurants, retails combined in 5 years from now

- The virus' stress on the healthcare system is also spurring interest in asynchronous healthcare, a form of telemedicine that can help patients monitor and manage chronic conditions from the comfort of their homes.
- Private homes, where the vast majority of older adults get both personal and post-acute care, are also at risk of experiencing a healthcare crisis as a result of COVID-19. The pandemic is creating enormous challenges for seniors, their families, and the workers and home care agencies that provide critical home care services.
- Healthcare providers and caregivers now have to take precautionary measures, including health screenings, hygiene practices and wearing special protective equipment, when it comes to home visits.

Insights: Post COVID-19



- Experts believe the pandemic will spur demand for innovation of new capabilities in wearable devices, including temperature tracking, disinfectant features or even things as simple as push reminders spurring consumers to wash their hands more often.
- Using voice control means people can avoid commonly touched surfaces around the home from smartphones, to TV remotes, light switches, thermostats, door handles, and more.
- Alexa and Siri have become a hands-free necessity in the home in the wake of the pandemic.
- The epidemic has made more consumers aware of the importance of health and increased their interest in wrist bands, smartwatches, and other health trackers.
- More and more companies are offering promotions and deals on home products and services.
- Wearables as tools for boosting wellness—particularly by offering real time monitoring—have become an increasingly high-profile arena in recent months.
- Canadian restaurants are transforming into online grocery stores to cater to pandemic demand.

30%

expected growth of the wearables market in 2020

“Home care can no longer be left to manage with outdated technology and a paper-based system. It is essential to remove barriers to system wide innovation and find solutions that address the needs of patients across their care experience.”

Home Care Ontario

Health at Work

Going to work has a very different meaning today than it did just a couple of months ago as a result of the pandemic. On one hand, the strict implementations of social distancing have meant that many people are now working from home. On the other end of the spectrum are essential workers—and more specifically, healthcare employees—who are still required to go into work during this difficult time.

It's fair to say that right now, all work-related circumstances are paired with their own sets of challenges. While remote work is mired with concerns around job uncertainty and isolation, essential service workers are faced with the daily risk of virus exposure, extremely long work hours, and threats to their physical and mental well-being.

Fortunately, there is a huge opportunity for businesses to respond in a way that will have lasting and positive impacts, and help contribute to better health and well-being of all workers, no matter their circumstances.

From implementing 24/7 counselling, holistic benefits plans, and virtual stress management, to using AI and chatbots for more personalized wellness programs, and promoting online self-care strategies, businesses today are turning to many innovative solutions to invest in both benefits and people, and to ensure a healthier future for all employees.

Insights: Pre-COVID-19

The last decade has seen a change in the traditional method of working, with organizations embracing remote work and placing more significance on the employees themselves.

7%

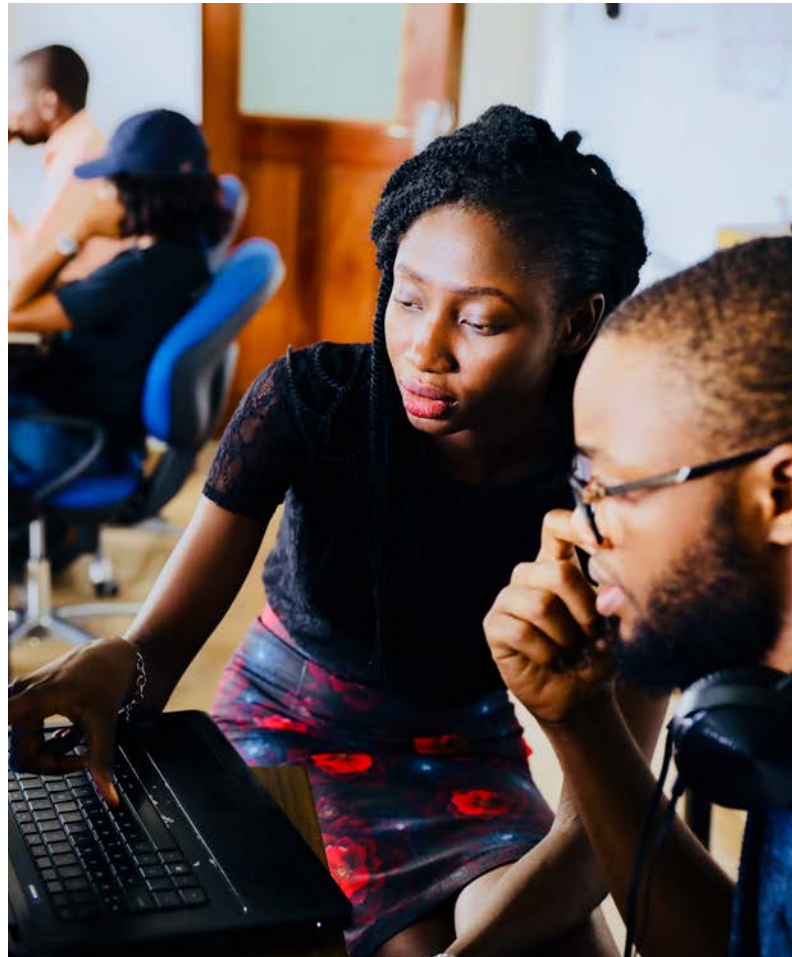
of civilian workers in the U.S. had access to a “flexible workplace” benefit, or telework, in 2019

58%

of employers stated that they already offered financial wellness benefits in a 2016 report by Aon Hewitt

75%

of professionals believed it was their employer’s responsibility to contribute to their health and well-being, in part by providing wellness benefits according to a 2019 survey



- According to a 2019 report by the WHO, while work has shown to be good for mental health, a negative working environment can lead to physical and mental health problems.
- Holistic benefits plans—constructed to address all aspects of care, including mind and body—have become more readily available.

Insights: Pre-COVID-19

“ One of our recommendations to employers is they need to communicate with employees more about mental health issues. They need to educate them more about the resources that are available.”

Karla Thorp

Associate Director, Conference Board of Canada



- More companies are approaching health insurance and employee benefits with an eye toward investing in both benefits and people.
- According to a 2016 survey by the Canadian government, respondents and stakeholders recognized that flexible work should be part of workplace reality and has advantages for both employees and employers, including reduced absenteeism; healthier workers who are able to support their families and friends; more effective recruitment and retention, especially among millennials; more diverse, inclusive, engaged and healthy workplaces; increased labour market participation by workers with chronic illnesses, disabilities and mental health issues; and greater productivity and more innovative, effective ways of working.
- AI and chatbots have opened the door for more personalized experiences for employees by allowing companies to leverage data to tweak and adjust their wellness programs, resulting in a better user experience based on the employees' preferences and wellness goals, as well as reduced overall corporate costs through fine-tuning.

“(The pandemic) is rather a moment for companies to build out the kind of technology and culture that, when the economy is back to full force, could make remote work easier for those who want to take advantage of it in a future where white-collar work might involve a little less commuting and a little more home.”

The Atlantic

Insights: Pre-COVID-19

16%

(or 26 million) of the total U.S. workforce were working remotely at least part of the time in 2019

84%

of employers said they planned to offer financial wellness benefits by the end of 2017 in a 2016 report by Aon Hewitt

85%

of professionals said they would be more likely to recommend an employer who supported well-being efforts according to a 2019 survey



“Remote work can increase employee satisfaction when implemented correctly.”

American Psychological Association

Insights: Post COVID-19

The pandemic has created a major shift in the way people work and introduced new methods of carrying on with business that are likely here to stay.

4.7 million

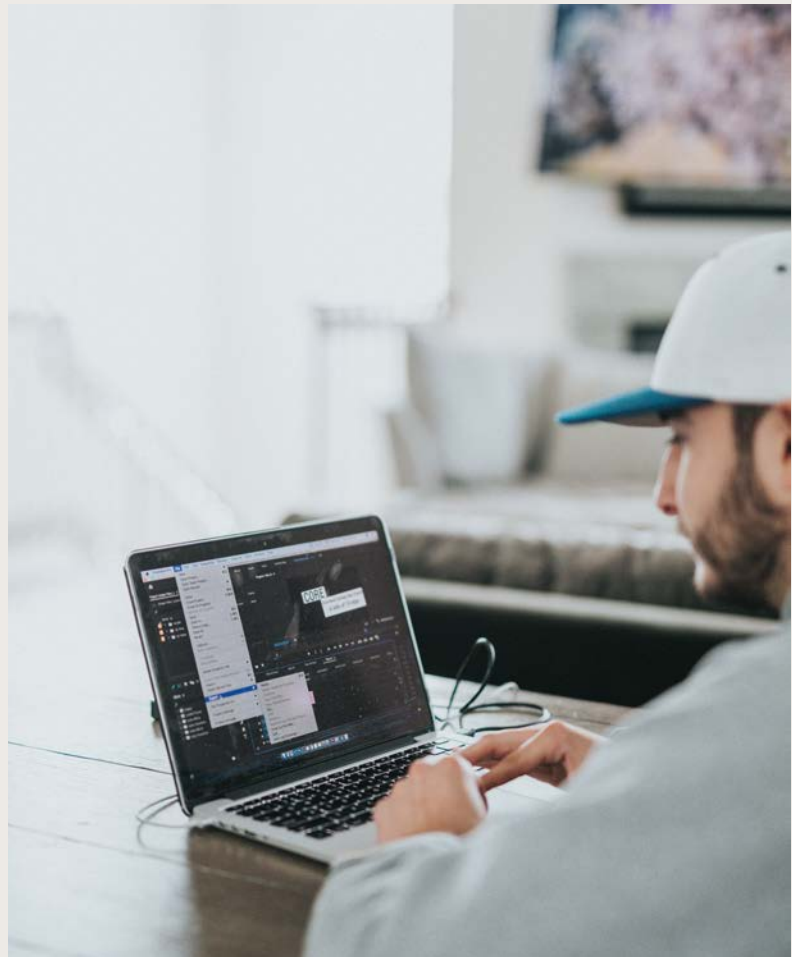
Canadians who don't usually work from home did so during the last week of March 2020

34%

of Americans who had been employed four weeks earlier said they were working from home in April of 2020

20-30%

of the U.S. workforce is estimated to work from home multiple days a week by the end of 2021 according to an April 2020 Global Workplace Analytics survey



- Coronavirus is causing more people to work from home than ever before.
- When implemented correctly, remote work can increase employee satisfaction. And further research has shown that working from home also has the potential to boost productivity, improve work/life balance, and foster better mental health.

Insights: Post COVID-19



- Responsible leadership from the private sector is needed more than ever. The way that business leaders respond will have an important influence on the state of our post-coronavirus world.
- Beyond lost creativity and companionship, the gravest threat to many companies from remote work is that it breaks the social bonds that are necessary to productive teamwork.
- Managers will have to normalize more video conferencing and corporate retreats, because their employees will continue to crave face-to-face interaction.
- Google established a global COVID-19 fund that enables all temporary staff and vendors to take paid sick leave if they have any symptoms, or can't come into work because they're quarantined.
- Acting with kindness and compassion during a crisis is not only the right thing to do, but it will augment an organization's reputation and brand and will drive more loyalty from employees and consumers. This is the time to operationalize culture and values.
- Because of the epidemic, businesses as well as consumers have gradually adapted to real-time video communication in a trend that will have a positive effect on how people communicate with each other and drive the development of a diversity of video devices including TVs, smart audio and video devices, and laptops.

Mental Health

COVID-19 has changed life as we know it, with recent data suggesting that millions of people around the world are facing serious challenges related to depression, anxiety, and emotional exhaustion as a result of the pandemic.

While the immediate consequences of the pandemic include high mortality rates and an unprecedented economic downturn, the long-term effects are predicted to include psychic trauma, mental illness, and burnout.

On the upside, both the Canadian and U.S. governments have moved to launch funding for various mental health-focused organizations and initiatives, including support for frontline healthcare workers who have been dealing with unparalleled levels of stress and other mental health issues as a result of the pandemic.

Meanwhile, companies that are already offering virtual mental healthcare services are seeing a massive surge in interest and are working toward introducing new tools, hiring more staff, and accelerating timelines to meet the demands of a public that's in dire need of mental health resources.

Insights: Pre-COVID-19

Issues surrounding mental health on a global scale have seen a dramatic influx over the last while, with the demand for mental health resources reaching its all-time high.

1 in 5

people in Canada experience a mental health problem or illness in any given year

8.4 million

Americans provided care to a person with emotional or mental illness in 2016

\$1 trillion

in lost productivity costs for the global economy each year as a result of depression and anxiety

- The America's Mental Health 2018 study by the National Council for Behavioral Health revealed that a lack of access was the root cause for the mental health crisis in America despite more than half of Americans seeking help.
- According to the National Institute of Mental Health, mental illness is very common in the U.S., with nearly one in five (46.6 million) U.S. adults living with a mental illness in 2017.
- Many businesses have been trying to address the shortage of in-person mental healthcare by providing virtual coaching, monitoring, and educational content long before the coronavirus outbreak.
- The demand for mental health services has long been higher than the supply of available sit-down appointments.
- Researchers have been testing different ways of using AI to help screen, diagnose and treat mental illness, such as implementing AI algorithms into Facebook to predict depression as part of the World Well-Being Project launched in 2019.
- Krembil Centre for Neuroinformatics, which uses AI and data science to better understand mental health, officially opened at CAMH in June 2019.
- Younger people were less sure about resources for mental health services compared to older generations, and that they were more likely to worry about others judging them when they admitted to seeking mental health services according to, The America's Mental Health 2018 study by the National Council for Behavioral Health.

Insights: Pre-COVID-19



1 in 5

U.S. adults experienced mental illness according to the 2018 National Survey on Drug Use and Health

- Each year, the WHO marks World Mental Health Day around the world, with the focus for 2019 being suicide prevention.
- According to a 2017 report from the Canadian Labour Congress, despite campaigns to raise awareness about mental illness, there is still a lot of discrimination and prejudice against people with depression, eating disorders, schizophrenia, anxiety, PTSD, bipolar disorder, postpartum depression and other mental illnesses.
- According to the Mental Health Commission of Canada, one in five (7 million) Canadians experience a mental health problem or illness every year but it continues to be met with widespread stigma: in hospitals, workplaces, and schools, in rural and urban communities, even among close friends and families.
- A 2017 article in The Permanente Journal revealed that elderly individuals, minorities, low-income groups, uninsured persons, and residents of rural areas in developed countries are less likely to receive adequate mental health care, and most people with severe mental health problems receive either no treatment or inadequate treatment of their disorders.

“In the context of the COVID-19 pandemic, it appears likely that there will be substantial increases in anxiety and depression, substance use, loneliness, and domestic violence; and with schools closed, there is a very real possibility of an epidemic of child abuse.”

JAMA Internal Medicine

Insights: Post COVID-19

The pandemic has pushed the topic of mental well-being to the forefront and given rise to more tech innovation, tools, and resources specifically designed to tackle this widespread concern.

67%

of employees surveyed by Qualtrics across a number of countries in early April 2020 reported higher levels of stress since the outbreak of COVID-19

- Many virtual mental health companies are offering some of their services and content for free during the pandemic.
- The pandemic has intensified existing symptoms of depression and anxiety for some people and is causing new symptoms for others.
- The pandemic has driven several companies to speed up their timelines to launch digital mental health services that were already in the works.

50%

of healthcare workers attending COVID-19 patients in China reported to be experiencing symptoms of depression according to a study published in March 2020 by the Journal of the American Medical Association

- Mental Health Commission of Canada has launched the Mental Health First Aid COVID-19 Self-Care & Resilience Guide in March 2020 as a response to the difficult times connected to the COVID-19 pandemic.
- Project Parachute, which launched as a local movement in North Carolina, now provides free mental healthcare to frontline workers across 37 states with the help of more than 500 volunteer therapists.
- Mental health professionals in the U.S. launched a platform in March 2020 to help doctors on the frontline of the pandemic manage their own mental health.

57%

of Americans were concerned that the pandemic will have a serious negative impact on their finances according to a March 2020 poll by the American Psychiatric Association

Insights: Post COVID-19

“Mental wellness is difficult to maintain with the disruptions happening now. It's not easy to maintain a routine. People in every community are struggling and need our help. That's why we are acting today to make it easier for Canadians to identify, understand and address issues they are facing, with multiple tools and resources available on one platform.”

The Honourable Patty Hajdu, Minister of Health



36%

or more than one-third of Americans say coronavirus has had a serious impact on their mental health according to a March 2020 poll by the American Psychiatric Association

42%

of employees surveyed by Qualtrics across a number of countries in early April 2020 reported their overall mental health has declined since the pandemic began

Insights: Post COVID-19

\$7.5 million

in funding for counsellors and trained volunteers with Kids Help Phone was announced by Canadian government in March 2020

57%

of employees surveyed by Qualtrics across a number of countries in early April 2020 have reported greater anxiety since the outbreak

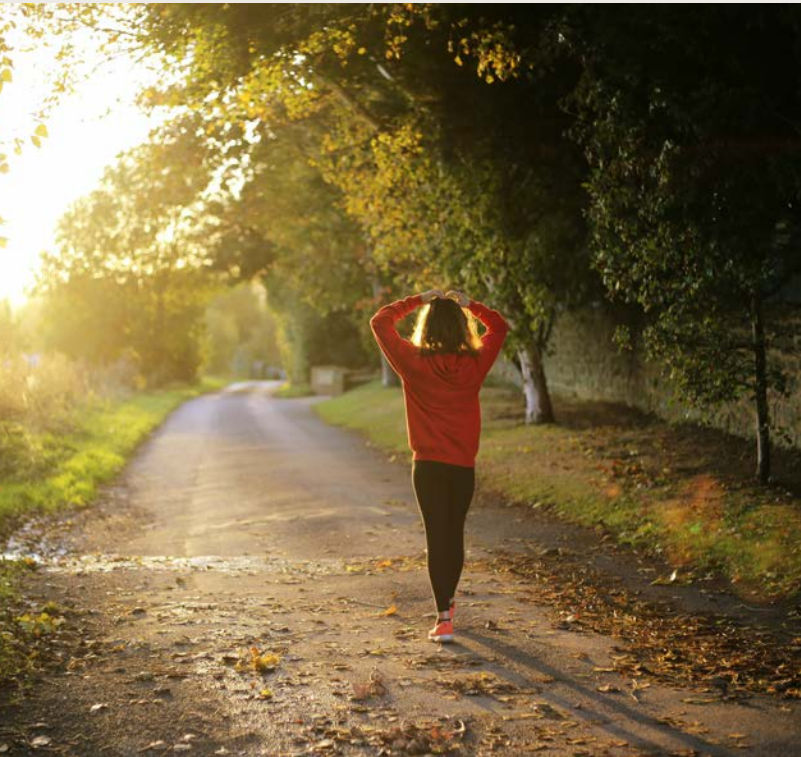
- In March 2020, New York State Governor Andrew Cuomo announced the creation of a statewide hotline to provide free mental health services by volunteer mental health professionals, and backed by the New York State Psychiatric Association, to individuals sheltering at home who may be experiencing stress and anxiety as a result of COVID-19.
- In April 2020, a coalition of leading mental health advocacy groups, largest healthcare insurance companies, and the Department of Veterans Affairs in the U.S. launched the COVID-19 Mental Health Resource Hub—a package of free digital resources to help individuals and providers address mental health needs during the pandemic.
- In April 2020, a partnership between Stepped Care Solutions, Kids Help Phone, Homewood Health, and Greenspace Health launched Wellness Together Canada, a new online platform that provides Canadians with immediate mental health and substance use support amid the pandemic.

Insights: Post COVID-19

“If there ever were a time when we can use all the emotional support possible, then it would be during a global pandemic.”

Dr. Amin Azzam

Adjunct Professor of Psychiatry, University of California, San Francisco, and UC Berkeley



- In April 2020, the Canadian government announced an expansion of online and virtual mental health supports to help Ontarians navigating the difficult realities of COVID-19, including the Canadian Mental Health Association's BounceBack program, offered free of charge to help people experiencing mild to moderate anxiety, stress and other mental health challenges associated with the pandemic.
- In April 2020, BEACON (a Gene client) launched Stronger Minds with the support of Manulife and Green Shield Canada; the free digital program supports continuously evolving mental well-being concerns of Canadians through the COVID-19 crisis.

“In (a) cross-sectional study of 1,257 healthcare workers in 34 hospitals equipped with fever clinics or wards for patients with COVID-19 in multiple regions of China, a considerable proportion of healthcare workers reported experiencing symptoms of depression, anxiety, insomnia, and distress, especially women, nurses, those in Wuhan, and frontline healthcare workers directly engaged in diagnosing, treating, or providing nursing care to patients with suspected or confirmed COVID-19.”

JAMA Internal Medicine

Healthy Aging

From the very start of this global pandemic, evidence has shown that older adults are at a significantly increased risk of severe disease following infection from COVID-19. Some of the reasons behind this include the physiological changes associated with aging, decreased immune function, and multimorbidity, which make older adults more vulnerable to the virus.

At the beginning of this challenging and unpredictable time, ensuring access to testing, health and other social services—specifically for the older generation—was not a top priority on the agendas of global or national emergency preparedness plans.

But on a positive note, not only have there been reports of people over the age of 100 who were admitted to hospital for COVID -19 and have since made a complete recovery, but that society as a whole has been ramping up efforts to advocate for the aging population through systemic changes, innovative healthcare solutions, and advancements in technology.

The concept of “healthy aging”—notably highlighted in the "The Future of Aging" book, recently published by SE Health (a Gene client)—is becoming even more prevalent today, with more emphasis being placed on the complex realities and possibilities around aging, and what the future holds for older adults.

Insights: Pre-COVID-19

The aging population has been on a steady climb toward an all-time high, signalling an increasing demand for new resources and support systems.

17.5%

or 6,592,611 seniors made up the Canadian population in July 2019

68%

is the expected growth of Canada's seniors population, aged 65 and older, over the next 20 years

7%

of U.S. adults aged 65 years and older needed help with personal care from other persons in 2018

1 in 6

people in the world is predicted to be over the age of 65 by 2050

- With the world population aging fast, there will be more than 1.4 billion senior citizens in the world by 2030.
- As life expectancy increases, a number of elderly people will be living with various chronic ailments, physical disabilities and mental incapacities that would require long-term medical attention and care.
- With an aging population, it is becoming increasingly important to devise ways of ensuring that older people can live safely and independently for as long as possible. One of the biggest issues is often lack of mobility, with elderly people becoming unable to get themselves out of bed or move around.
- As an increasing number of elderly are left home alone, companionship is a big challenge that the home healthcare industry needs to address as part of their vision to offer holistic care.
- Several technological innovations are now available to aid in the care of the elderly in the home, including pendants that automatically alert caregivers of a fall, pill bottles that sense use, and carebots that help with being independent.
- Home healthcare start-ups are aiming to use AI and chatbots in elderly care to sport motion, access and monitor health charts, fix appointments and even communicate with the elderly in an attempt to dispel loneliness.

Insights: Pre-COVID-19

“The question becomes, ‘How do we look at social distancing to protect seniors physically but still engage them socially?’”

Dr. Roger Wong

Clinical Professor, UBC Department of Medicine



- In Japan, where 20% of the population is over 65, they are looking to carebots—robots specifically designed to assist elderly people—to shoulder the burden. These carebots can range from life-sized humanoid bots that can lift patients, or help them walk, to furniture that transforms from a bed to a wheelchair, and mobile servants that can fetch and carry things from one room to another.
- Founded in 2016, Intuition Robotics debuted a robot called ElliQ which helps older adults avoid loneliness and social isolation by initiating conversation to help the senior stay in touch with family or loved ones, engage in healthy behaviours, and stay connected with the outside world.

16%

of the U.S. population was 65 years old or older in 2018

“Recognizing that seniors represent one of our most vulnerable communities, we're taking steps to ensure they are taken care of during this challenging time. It's really important that we take action so that they don't fall through the cracks at a time when they need support the most.”

CIBC

Insights: Post COVID-19

The pandemic has forced governments, institutions, and individuals to rethink the way we approach senior care by putting more emphasis on innovative solutions within the complex context of aging in modern society.

1.4 billion

senior citizens predicted to be in the world by 2030

180,000

sales and service employees in Ontario are aged 60 years and up

10%

of the U.S. population as of April 2020 is over the age of 70

80%

of COVID-19-related deaths took place among Americans aged 65

- While communication for older family members who are self-quarantined at home and dealing with solitude can be difficult—especially for seniors who aren't used to turning to technology to socialize—tech tools like smart speakers, voice technology and sensors have shown to be an easy and hands-free solution that allows to search the internet without a screen, stay connected with loved ones, and get help around the house.
- Families are turning to online video platforms to manage funeral services virtually.
- It's recommended that philanthropy work gives special attention and funding to programs and services that focus on the needs of the older population.

Insights: Post COVID-19

“Seniors have been encouraged to use e-medical services like online doctor’s appointments and health self-assessment tools through their phones, wearable devices, or with the help of volunteers.”

Asia Pacific Foundation of Canada



- In April 2020, Canada’s Minister of Seniors announced flexibility for organizations under the New Horizons for Seniors Program (NHSP) to use funding previously received through the community-based stream to provide immediate and essential services to seniors impacted by COVID-19.
- An example of one creative solution for helping the older population during the pandemic is a small Chilean community using high-tech drones to deliver medications, masks, and hand sanitizer to its elderly in remote areas.

“As we assess impact on aging individuals, we also account for their important contributions in disaster preparedness and response. Research has documented the important social capital, perspective and wisdom provided by these individuals in the form of their experience and pre-existing social networks. Thus, older adults may have important lessons to teach COVID-19 sufferers, as well as healthcare professionals from all age groups.”

The American Journal of Geriatric Psychiatry

Today, Tomorrow, and Beyond

The COVID-19 pandemic has brought immense challenges to many industries, forever changing the world as we knew it. However, despite this time of constraints and difficulties, the pandemic has accelerated innovation in response to coronavirus and removed many barriers that existed prior to this reality emerging.

Today, Tomorrow, and Beyond

Brands have an unprecedented opportunity to find new, innovative ways to drive their mission and vision forward and evolve the ways they create and deliver value for their audiences.

As an experience design agency focused on the future of health, we believe that health(care) brands and experiences must be designed with purpose in mind, empowering every interaction, physical or digital. And the organizations that are able to clearly communicate their value—and what they stand for—will be able to (re)build trust and win in the long run.

For this to happen, consider the following:

- Understand your customer—and their changing mindsets, habits and preferences. This new reality means there is no going back, and the ability to adapt and evolve is mission-critical.

- Plan for the future—short-term and long-term—and look for ways to differentiate from other players and new opportunities to lead.
- Leverage this time to test, pivot and build new solutions: the convergence of physical and digital is here to stay, propelled by the accelerated awareness and adoption of virtual models of product and service delivery.

Overall Insights

Consumer health is here

Today's consumer is more informed about their health, including fitness, nutrition, and mindfulness—calling for more sophisticated, customized products and services to be delivered in convenient, modern ways. The pandemic has been a driving force behind the entire health and wellness industry going virtual within days. Consumers are readily taking advantage of technologies and online products and services, with health-related matters becoming more important than ever before.



Deliver in digital

The accelerated transition to digital modes of care delivery has emerged as a silver lining of the pandemic. Levels of awareness and adoption around virtual care models have reached unprecedented levels, and new tools and technologies continue to rise in the ongoing fight to address the global healthcare crisis. The demand for digital health technologies will continue driving innovation in this space—with many services rapidly moving from analogue to digital, or both—and eventually becoming the mainstay.



Have a home strategy

Home is the future of health and a fertile ground for innovative solutions. The pandemic has promoted a significant shift in the way people access health products and services within the home setting, the demand for which is here to stay and will impact self-care habits in significant ways. Consumers are now changing the way they can access healthcare services for themselves and loved ones, with more consideration around emerging solutions and traditional models, such as home care—as many have had to become caregivers during this challenging time.



Overall Insights

Help employers care

Today's employees rely on organizations for solutions surrounding physical, mental, emotional, and financial well-being. The pandemic is revealing how companies are willing to help employees not just cope, but thrive during this difficult time. Maintaining connections, focus, and effectiveness is a massive challenge given the circumstances but at the same time, there is a huge opportunity for organizations to redefine their approach to supporting employees and reshaping workplace culture.



Mental health is imperative

The long-term effects of the pandemic will include mental illness, psychic trauma, and burnout across all generations. While the topic of mental health has received much-needed attention, addressing these massive challenges will require significant investments in and efforts from governments, businesses, healthcare systems, and innovators to meet the surge in demand for more support and resources.



Greater emphasis on aging

Seniors have been impacted by COVID-19 more than any other age group, having experienced higher rates of mortality, hospitalization, threat of infection, and severe symptoms. The lack of resources and foresight, as well as having to deal with tragic loss, will likely mean greater emphasis on patient and caregiver services and tools needed to support older adults, while considering the complexities of aging in modern times.



Leading through this crisis toward a more promising future, with a relentless focus on where we can provide value to our clients and partners, has been our priority. We believe that the work we do holds the potential for greater impact—beyond revenue—and can help to realize positive change.

We welcome every opportunity to contribute through our offering and expertise—**for a healthy future.**

Who is Gene?

Who is Gene?

We are a purpose-built agency focused on creating a healthy future.

We know that health and well-being are driven by the experiences of day-to-day life, and considering the unprecedented and widespread impact of the COVID-19 pandemic on society as a whole, we are striving now more than ever to ensure that health matters to everyone.

By being constantly exposed to emerging trends, new players, and the latest innovative developments coming into the health and well-being space, we are staying ahead of the curve in knowing what's next for us and our clients.

It is through our work that we hope to make the world a better—and healthier—place.

Please be advised that statistics, figures, and insights may have been updated from the time of this document's original publication.

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Thank you



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