iBODY: THE NEW FRONTIER

Prosumer Report | HAVAS WORLDWIDE
ABOUT THE STUDY

In March 2015, Havas Worldwide partnered with Market Probe International to survey 10,131 people aged 18+ in 28 markets:

- Australia, Belgium, Brazil, Canada, China, Colombia, the Czech Republic, Estonia, France, Germany, India, Ireland, Italy, Japan, Latvia, Lithuania, Malaysia, Mexico, the Netherlands, Poland, Portugal, Saudi Arabia, Singapore, South Africa, Spain, the United Arab Emirates, the United Kingdom, and the United States.

The survey sample was made up of

20% leading-edge Prosumers

and 80% mainstream consumers.

Who are Prosumers?

Prosumers are today’s leading influencers and market drivers—and have been a focus of Havas Worldwide studies for more than a decade. Beyond their own economic impact, Prosumers are important because they influence the brand choices and consumption behaviors of others. What Prosumers are doing today, mainstream consumers are likely to be doing six to 18 months from now. Learn more at http://www.prosumer-report.com.

For the purposes of this report, we have characterized respondents aged 18–34 as millennials.
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For centuries, people didn’t fully own their bodies. Women’s bodies were made for giving birth; men’s, for labor of another kind. The community and social order decreed what one was expected to do with one’s body and what was forbidden. With the exception of a few wealthy or otherwise elevated persons, self-expression was not on the agenda.

In recent decades, attitudes have changed. We’ve seen an unprecedented movement toward taking ownership of one’s physical self. Initially, the movement was led by women, who had to struggle to gain a measure of corporal control, especially in relation to their husbands. And even today, these rights continue to be denied in many parts of the world. Female genital mutilation is still widely practiced in many African nations, and spousal rape is legal in India, the Bahamas, and Singapore.

Men have been claiming ownership of their bodies in different ways. Sociologists point to the booming market for cosmetics for men as one sign of a broader emancipation process. Taking care of one’s outward appearance (not only by building muscles but also by purchasing anti-aging products and age concealers or undergoing cosmetic surgery) is a break from the tradition of men being taught not to care about wrinkles or gray hair.

As we’ve taken ownership of our bodies, we’ve begun to use them as a canvas—a medium for self-expression. Once largely relegated to specific subclasses, tattoos can now be seen on people of either gender, any income bracket, and virtually any age, beginning with the teen years. In France, more than 10 percent of the population...
is now tattooed—a figure that rises to 21 percent among those aged 25–34. In the United States, more than a third of people aged 18–25 sport at least one tat, according to Pew Research Center. French sociologist David Le Breton links tattoos’ broadened appeal to the fact that the body is the one and only permanent thing people own. By choosing the words and images they want to display on their bodies, people are making a stand for their own freedom and showing that they can lead a life of their choosing.
To test this theory of self-ownership, we asked our study respondents a simple question: “Who owns your body?” While 13 percent of the global sample (16 percent in emerging markets vs. 9 percent in developed markets) cited God, 81 percent said they themselves are the owners.
Who owns your body?

(CONTINUED)
And they’re quite pleased with their possession: When we asked people to fill in the statement “My body is a source of…” and gave them nine responses from which to choose, the top picks were universally positive: happiness, pleasure, pride, and power. Only 1 in 10 respondents indicated their body is a source of embarrassment, disappointment, or shame—a happy surprise, given the struggles with body image we hear so much about.

### My body is a source of...

<table>
<thead>
<tr>
<th></th>
<th>Australia</th>
<th>Belgium</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>Colombia</th>
<th>Czech Republic</th>
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<td><strong>None of these</strong></td>
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It may be that people are genuinely at ease with how their bodies look and function. Or it may be that they simply are fighting back against the societal pressure to be physically “perfect.”

So, now that people are taking ownership of their bodies and feeling good about them, what’s the story? What’s next?
Two overarching themes emerged from our research:

1. There’s a new body pressure linked to responsibility.

If you own something, you’re responsible for it. It’s a point we explored in a previous report, My Body, Myself, Our Problem: Health and Wellness in Modern Times (2012). People don’t simply consider themselves responsible for their own health; a majority believe they have at least some control over illness. In other words, if they get sick, it’s at least partly their own fault. If we develop the parallel with the body, it means that people who aren’t satisfied with their physiques have themselves to blame. We can see that attitude in recent gym advertising taglines such as Gold’s Gym’s “It’s not your jeans’ fault.” Or as cosmetics legend Helena Rubinstein famously stated, “There are no ugly women, only lazy ones.”

Regardless of Rubinstein’s intent, the emerging attitude we’re seeing isn’t about living up to some artificial standard of beauty. It’s about feeling good and being healthy—and about making smart life choices.

2. There’s a new body ethic linked to scientific progress.

Science allows us to better know the human body and find new ways to cure it and enhance its potential. In theory, there’s no limit to what we can do and how we can modify ourselves. Yet we are seeing a good deal of pushback on this front, as people shy away from the notions of “super humans” and tinkering with nature just as surely as they fear genetically modified produce. We found markedly different attitudes across the globe on this topic, as well as some clear distinctions between which “advances” are and are not acceptable.
IN THIS REPORT, we will focus on three aspects of our new relationship with the body:

A typology of body perspectives:

Even with mass globalization, individual countries continue to be influenced by a unique set of cultures, beliefs, and traditions. These color our perspectives on every aspect of life, including how we view our physical selves.

“Beauty fatigue” and high-tech solutions:

As people grow weary of society’s obsession with youth and largely unattainable beauty ideals, the focus becomes more on how our daily choices and behaviors affect how we look, feel, and operate. The emphasis now is on creating a more natural and preventive beauty/fitness regimen—a regimen that increasingly will be apt to include a high-tech component.

A new frontier of body enhancement:

New tools with which to enhance and perfect the body and mind are becoming less sci-fi and more real every day. In the realm of body enhancements, how far is too far? And which countries will be taking the lead?
How each of us feels about our individual body depends to some extent on cultural background. In some parts of the world, the body is revered as a temple, a sacred vessel that must be kept pure and that deserves to be celebrated in its natural state. Elsewhere, the body is seen more as a tool—whether to be used for seduction, mobility, work, play, or something else.

Combining responses to our survey with cultural insights from strategic planners in each market, we were able to identify three segmentations within the survey sample and determine which segmentation best fits each market.

It’s important to recognize that every country contains a mix of the three perspectives. There are plenty of Holistic Enthusiasts in the US and Pleasure Seekers in China, for instance. These country distinctions merely help us understand the predominant influence within each market.
The countries that are part of this cluster value the pleasure the body can bring above all else. In general, these countries are more laid back and relaxed, with people who seek out activities that provide fun, amusement, and excitement for body and mind. For instance, the people of France are renowned for their love of food and sex. The former is quite logical for a country whose multicourse gastronomic meal has been designated an intangible world heritage by UNESCO, worthy of being preserved in the same way that the organization protects sites of cultural value or great natural beauty. And the latter can be summed up with a simple term: French kiss. Unlike puritanical countries such as the UK and US, the Pleasure Seeker nations consider hedonism something to be celebrated, not censored.
I am satisfied with...

% AGREEING STRONGLY/SOMewhat

MY CURRENT WEIGHT

MY LEVEL OF FITNESS

Being at ease with one's body doesn't necessarily mean it's off limits to tinkering, of course. That's especially the case in Brazil, which is now regarded as one of the cosmetic surgery capitals of the world. Though home to less than 3 percent of the world's population, Brazil accounted for nearly 13 percent of cosmetic procedures performed in 2013. The purpose, for many, isn't to look younger or stay competitive
in the job market, but to be sexy longer. Among the most popular procedures: gluteal prosthesis (aka Brazilian butt augmentation) and vaginal rejuvenation (tightening). As a 46-year-old cosmetic surgery devotee told NPR, “First off, I do this for me. These kinds of things you need to do for yourself. And second, there’s nothing better than getting a compliment, right? That you’re good, that you’re sexy.”
In general, people in these countries seek to take a more holistic and balanced approach to life—including the care and feeding of their physical selves. Holistic Enthusiasts pay attention to the natural cycles, such as sleeping well and spending time outdoors. And they recognize that an overtaxed and poorly maintained body is more susceptible to illness and disease. Looking at China and India, we see that around a third of respondents there have undergone a juice cleanse or body detox, compared with just 7 percent in France.

A majority of Indians (57 percent) and more than 4 in 10 Chinese are making it a point to get a better night’s sleep, compared with just around a quarter of Americans who are doing the same. And with 72 percent agreement (80 percent of Prosumers vs. 70 percent of the mainstream), Indian respondents were the most likely to say they have been making a stronger effort to eat healthfully.
In these countries, nature is something to be not just respected, but revered. And so it’s not surprising that a majority of respondents in the Holistic nations of China, Germany, and India, and a majority of the male respondents in the United Arab Emirates, prefer to show off...
their natural selves rather than try to obscure particular parts of their bodies. Belgium’s low score on this question most likely is tied to their dissatisfaction with their current levels of weight and fitness (see chart on Page 15).
The Functionalists

Australia, Japan, Malaysia, Netherlands, Singapore, United Kingdom, United States

HYBRIDS: with Pleasure—Colombia, Ireland, Mexico, South Africa; with Holistic—Estonia, Saudi Arabia

For the Functionalists, the body isn’t to be nurtured so much as it is to be fixed and fueled. People in these markets tend to see their physical selves as part of their arsenals for success. They want the edge that comes from attaining peak fitness.

Does this mean these nations are populated by perfect physical specimens? Are you kidding? Have you seen the obesity rates in the US and UK lately? For many, physical fitness is more aspirational than reality based. The Functionalists want to be healthy, but they’re always on the lookout for quick fixes that will take them there—those “miracle” solutions so heavily peddled by Dr. Oz and his ilk. These are the populations most vulnerable to “beauty stress” and “beauty fatigue” because only a small percentage are able to reach a point at which they’re satisfied with their results. Only 1 in 10 Japanese and 1 in 5 Australians, for instance, consider their bodies a source of pride, compared with a third of the global sample. And more than 7 in 10 respondents in Australia and the UK say they try to hide or disguise certain body parts as much as possible. This compares with just a quarter of respondents in Holistic China.

The Functionalist countries are also somewhat more likely to stress self-responsibility, pressuring others to make the right lifestyle choices or face the consequences. In a separate survey conducted by Havas Worldwide Tonic, we found that 36 percent of Americans, compared with 27 percent of the French, believe type 2 diabetes is caused by lifestyle choices and thus is largely the fault of the individual.
The good news: Most people—nearly three-quarters of Prosumers and two-thirds of the mainstream—like how they look. This doesn’t mean there isn’t room for improvement, however. For instance, 4 in 10 respondents would like to be taller. And only around a third of men and 1 in 5 women claim not to have a single body part they’d like to change. If given the option, more than a third of millennials wouldn’t just swap out one body part—they’d go so far as to exchange bodies with someone else!
### Perfectly imperfect me

<table>
<thead>
<tr>
<th>Category</th>
<th>プロサマーグループ</th>
<th>メインストリーム</th>
<th>メンズ</th>
<th>レディース</th>
<th>18–34</th>
<th>35–54</th>
<th>55+</th>
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<tbody>
<tr>
<td>I like how I look</td>
<td>71%</td>
<td>56%</td>
<td>61%</td>
<td>56%</td>
<td>62%</td>
<td>57%</td>
<td>51%</td>
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<tr>
<td>I wish I were taller</td>
<td>40%</td>
<td>38%</td>
<td>38%</td>
<td>39%</td>
<td>43%</td>
<td>36%</td>
<td>29%</td>
</tr>
<tr>
<td>If I had the option, I would exchange my body for someone else’s</td>
<td>25%</td>
<td>27%</td>
<td>26%</td>
<td>28%</td>
<td>33%</td>
<td>24%</td>
<td>15%</td>
</tr>
<tr>
<td>I have had or am considering cosmetic surgery</td>
<td>18%</td>
<td>17%</td>
<td>16%</td>
<td>18%</td>
<td>22%</td>
<td>15%</td>
<td>7%</td>
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</table>
If I could change one part of my body, it would be my...

For MALE:
- Neck: 2%
- Back: 3%
- Hips: 2%
- Bottom: 3%
- Feet: 3%
- Face: 8%
- Shoulders: 2%
- Arms: 2%
- Hands: 2%
- Legs: 5%
- Tummy: 28%
- Other: 6%
- 34% would not change any body part

For FEMALE:
- Neck: 1%
- Back: 2%
- Hips: 5%
- Bottom: 5%
- Feet: 3%
- Face: 6%
- Shoulders: 1%
- Arms: 1%
- Hands: 1%
- Breasts: 10%
- Legs: 10%
- Tummy: 31%
- Other: 3%
- 21% would not change any body part
The way we look—and the way we feel about how we look—influences a lot more than whom we date or how well we pull off the latest fashions. Four in 10 respondents say people treat them differently because of how they look, and for 1 in 10 it’s in a negative way. For younger people, especially, the pressure to look great can be intense. It’s little wonder, then, that around a third of millennials report that seeing photos of friends and others on social media makes them feel bad about how they look. Nearly a quarter go so far as to avoid full-length mirrors as much as possible.

<table>
<thead>
<tr>
<th>#toxicemotions</th>
<th>PROSUMER</th>
<th>MAINSTREAM</th>
<th>MALE</th>
<th>FEMALE</th>
<th>18–34</th>
<th>35–54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>My weight/looks cause me to avoid some activities I think I’d enjoy</td>
<td>30%</td>
<td>32%</td>
<td>31%</td>
<td>33%</td>
<td>36%</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Seeing pictures of friends and others on social media makes me feel bad about myself</td>
<td>22%</td>
<td>24%</td>
<td>21%</td>
<td>25%</td>
<td>31%</td>
<td>18%</td>
<td>10%</td>
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<tr>
<td>As much as possible, I avoid looking in full-length mirrors</td>
<td>15%</td>
<td>20%</td>
<td>19%</td>
<td>20%</td>
<td>22%</td>
<td>18%</td>
<td>14%</td>
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</tbody>
</table>
If I had the “perfect” body/looks I would...

- Be more confident
- Be happier
- Be more active
- Own nicer clothes
- Be more outgoing
- Be more successful
- Be in a diff. relationship
- Have a diff. job/career
- Travel more
- Be more active
- Be meaner
- Go to nicer restaurants
- Be kinder
- Own nicer clothes
- Travel more
- Be no different
- I already have the perfect looks

PROSUMER  MAINSTREAM  MALE  FEMALE  18–34  35–54  55+
Confidence makes people more attractive

% AGREEING STRONGLY/SOMewhat

- Prosumers: 92%
- Male: 77%
- Mainstream: 79%
- Female: 85%

So, how would life be different if we all looked precisely the way we wanted to? Around a third of the sample said that life would be no different or that they already possess those “perfect” looks. Lucky them! For the remainder, a boost in confidence was the most popular response. That’s a bit of a chicken-and-egg scenario, since 8 in 10 respondents (and a whopping 92 percent of Prosumers) said confidence actually makes people more attractive. Nearly a third of the sample indicated that having the “perfect” looks and body would make them happier—a fairly low percentage given how much money and effort people devote to improving their looks.
Managing What Mother Nature Gave You

Our relationships with our bodies have become far more proactive and involved. Whereas people’s physical looks and shape largely used to be left to fate and were influenced primarily by the local diet and the work they did, now we are all our own asset managers (at least above a certain income level). Whatever genetic starting capital we’re handed at birth, we have an opportunity to maximize our assets and mask or minimize our deficits as we work toward our ideal image. Of course, that “ideal image” is heavily influenced by the society in which we live—and, in much of the world, today’s obsession is with a narrowly defined standard of beauty that’s all but unattainable, especially for women. And a lot of us are getting tired of it.

Across the global sample, 8 in 10 Prosumers and 7 in 10 mainstream consumers think the world would be a happier place if people weren’t so obsessed with physical beauty. Nearly as many believe society has lost sight of what true beauty is—a phenomenon that can at least in part be traced to the media’s manipulation of images. Does anyone really know what Kim Kardashian looks like? A growing number of A-list celebrities—from Beyoncé and Lady Gaga to Keira Knightley and Brad Pitt—have spoken out against celebrity Photoshopping and the obsession with super slimness and eternal youth. The backlash is intensifying, too, against celebrities who go to extremes in surgically altering their appearance.
It worries me that outer beauty is more highly valued than what’s in our hearts and minds.

The world would be a better place if people weren’t so obsessed with physical beauty.

As a society, we have lost sight of what true beauty is.

Magazines and websites digitally enhancing images of models and celebrities to make them thinner and/or more physically “perfect” is harming society.

While the pendulum may be ever so slowly creeping away from rigid beauty dictates and our obsession with the most narrowly defined youthful beauty, people are becoming even more fixated on physical fitness and health. Only 17 percent of our global sample claim never to exercise (9 percent of Prosumers vs. 18 percent of the mainstream), and the motivations of those who do exercise center far more on how they feel and what they can do with their bodies than on outward appearance.
Why do you exercise?

18–34 35–54 55+

To get in shape/be physically fit
To feel good/reduce stress
To be stronger
To be proud of myself
To test my limits/challenge myself
To combat boredom
I don’t exercise
I enjoy it
To lose weight
To get fresh air
To feel good/reduce stress
To be proud of myself
To combat boredom
To socialize/make friends
To get ahead in my job/career
To get out of the house
To be able to eat more/splurge

Pressure from family or friends
To lose weight
To get ahead in my job/career
To get fresh air
To get out of the house
To be able to eat more/splurge
In another question, we asked people why they want to be physically fit. Respondents were limited to a single response, and it was eye-opening to see that the majority were fairly evenly split between wanting to live healthier longer and wanting to feel good about themselves. The connection between how we look and how we feel is now firmly established in the way people think about the body and health.

Among the global sample, 5 percent or fewer chose each of these responses: To be strong; To be more successful in life and career; To be admired as beautiful/handsome; To be able to experience new things all the time; Some other reason; N/A
Among men, the emphasis on health and fitness over more peacockish displays of masculinity can be seen in the trend away from bodybuilding, with its outsized muscles, in favor of physiques that are toned and supple. What’s the point of looking strong and being able to lift heavy objects if your heart is weak? We can see that message in a come-on used by Equinox Fitness in its ads: “Are you skinny fat?” Although the tagline sparked some controversy, with critics fearing that already underweight women would think they needed to slim down even further, the line actually refers to a health issue of concern to many medical professionals: slim people who appear healthy on the outside but whose unhealthful diets put them at risk for diabetes, hypertension, and other diseases. Today, beauty isn’t just about physical features but about the physiological strength and health that underlie it.

Nature-Based Is the New Holy Grail…

Getting back to a simpler, more natural lifestyle is a huge motivator for people these days. It’s an issue we explored at length in our original New Consumer research in 2010. This trend is manifested in all sorts of ways, from the resurgence of backyard chicken coops and apiaries to the rise of the sharing economy and the careful decisions people make at the grocery store.

When it comes to how we care for our bodies in this New Consumer era, the emphasis is less on restrictive dieting and going to the gym than it is on something even more fundamental: consuming a healthful diet. For most people, that means more fruits, vegetables, and whole grains and less fat, sugar, and highly processed food. For nearly half of Prosumers, it also means getting a good night’s sleep. The notion of respecting the rhythms of nature and letting the body repair the damage we inflict on it during the day holds great appeal for those who have grown weary of the artificial, fad-focused mentality of modern life. This continued obsession with all things natural will only intensify the pressure put on the food and cosmetics industries to eliminate non-natural ingredients—and to be more and more transparent about how their products are made.
Compared with a couple years ago, I am doing the following more often:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Prosumer</th>
<th>Mainstream</th>
<th>Male</th>
<th>Female</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating healthfully</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Researching health matters online</td>
<td>68</td>
<td>53</td>
<td>52</td>
<td>58</td>
<td>66</td>
<td>54</td>
<td>54</td>
</tr>
<tr>
<td>Exercising</td>
<td>50</td>
<td>36</td>
<td>39</td>
<td>38</td>
<td>44</td>
<td>33</td>
<td>29</td>
</tr>
<tr>
<td>Getting a good night’s sleep</td>
<td>44</td>
<td>35</td>
<td>35</td>
<td>37</td>
<td>39</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>Taking vitamins and/or supplements</td>
<td>42</td>
<td>32</td>
<td>31</td>
<td>36</td>
<td>36</td>
<td>33</td>
<td>28</td>
</tr>
<tr>
<td>Dieting to lose weight</td>
<td>29</td>
<td>23</td>
<td>22</td>
<td>26</td>
<td>27</td>
<td>22</td>
<td>18</td>
</tr>
<tr>
<td>Going to the gym</td>
<td>29</td>
<td>17</td>
<td>20</td>
<td>18</td>
<td>25</td>
<td>16</td>
<td>9</td>
</tr>
<tr>
<td>Bodybuilding to gain muscle</td>
<td>21</td>
<td>16</td>
<td>19</td>
<td>13</td>
<td>23</td>
<td>13</td>
<td>6</td>
</tr>
<tr>
<td>Overeating</td>
<td>14</td>
<td>15</td>
<td>15</td>
<td>20</td>
<td>12</td>
<td>7</td>
<td></td>
</tr>
</tbody>
</table>

Prosumers, by definition, are more proactive and engaged than are mainstream consumers. And that’s certainly the case when it comes to caring for their bodies. We see from our new research that nearly half of Prosumers surveyed—and a third of the mainstream—would willingly avoid all unhealthful food for the rest of their lives to ensure that their bodies stay in peak condition. Around the same percentages say they’d
To ensure that my body stays at its best, I am willing to do the following:

<table>
<thead>
<tr>
<th></th>
<th>PROSUMER</th>
<th>MAINSTREAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoid all unhealthful foods for the rest of my life</td>
<td>45</td>
<td>34</td>
</tr>
<tr>
<td>Stick to a prescribed exercise regimen for the rest of my life</td>
<td>46</td>
<td>34</td>
</tr>
<tr>
<td>Have my DNA analyzed to detect potential diseases and other health conditions</td>
<td>40</td>
<td>28</td>
</tr>
<tr>
<td>Have a device implanted that monitors and reports on my health 24/7</td>
<td>17</td>
<td>11</td>
</tr>
<tr>
<td>Replace worn-out or poorly performing body parts with artificial substitutes</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>Take an experimental (unapproved) drug to slow down the aging process</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>Buy another person’s healthy organ on the black market</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>None of these</td>
<td>19</td>
<td>32</td>
</tr>
</tbody>
</table>

stick to a prescribed exercise regimen for the rest of their lives. Do we believe them? Well, not really. In our view, a very small percentage of people have the willpower to adhere to either resolution for the duration. What matters more to us is their desire to do so and the knowledge that Prosumers especially will welcome efforts to help them keep to such a healthful path.
…But Technology Can Lend a Helping Hand

In keeping with the push toward the natural, 80 percent of the global sample defined their ideal body as “the one nature gave me and that I keep at its best through natural means,” compared with just 20 percent who said their ideal body would be “enhanced by science to always be at peak fitness/performance.” That said, there are a couple of compelling reasons to believe that scientific interventions increasingly will be welcomed: Prosumers and millennials. Around a quarter of both millennials and Prosumers say their ideal bodies would be enhanced by science.

Keeping it real

![Chart comparing the proportion of people who believe their ideal body is the one nature gave them and that they keep at its best through natural means versus those who believe their ideal body is enhanced by science to always be at peak fitness/performance across different demographics.]

- **My ideal body is the one nature gave me and that I keep at its best through natural means**
  - **Prosumer**: 74%
  - **Mainstream**: 81%
  - **Male**: 78%
  - **Female**: 82%
  - **18-34**: 74%
  - **35-54**: 83%
  - **55+**: 92%

- **My ideal body is enhanced by science to always be at peak fitness/performance**
  - **Prosumer**: 26%
  - **Mainstream**: 19%
  - **Male**: 22%
  - **Female**: 18%
  - **18-34**: 26%
  - **35-54**: 17%
  - **55+**: 8%
If I had the option, I would choose to be a cyborg

Going significantly further, 25 percent of millennials said that, given the option, they would choose to be cyborgs—part human, part machine. Chalk one up for *The Terminator*. This suggests a growing consumer base for advances in this area.
For now, though, people appear most open to the notion of incorporating consumer technology into their body-focused routines just as they’ve done in other areas of their lives. A majority of mainstream consumers and 7 in 10 Prosumers think digital devices that monitor every aspect of one’s physical health would be a good thing. Nearly half of Prosumers and more than a quarter of the mainstream already use at least one digital app or device to monitor their health. People are slightly more leery of devices that monitor mental health, but even here 58 percent of Prosumers and 43 percent of the mainstream think they would be a good thing.

The response is very different when it comes to an implanted device that not only monitors one’s health but also reports on it 24/7. As seen in the earlier chart, fewer than 1 in 5 Prosumers and around 1 in 10 mainstream consumers currently would be willing to have such a device implanted. Clearly, a distinction is being drawn between wearable devices that one can use as one sees fit and implanted devices that are
permanent or at least inconvenient to remove. It also seems safe to assume that people are wary of the “Big Brother” potential of such a device, particularly in the hands of the insurance industry or employers. More than 4 in 10 global respondents said they’re concerned about the loss of privacy and confidentiality that new technologies of this nature might bring.

When you think about new technologies that will be designed for our bodies, which of the following potential consequences do you fear?
Given the higher levels of acceptance among millennials and Prosumer influencers, we think it likely that more and more people will be willing to submit to DNA testing in order to detect potential diseases and other health conditions. At present, such tests tend to be prohibitively expensive for most people, but interest in them surely will grow as more high-profile figures, such as Angelina Jolie, publicize their own experiences. Once people have a clearer understanding of their physiological strengths and weaknesses, they’ll be in a better position to manage their health and keep their bodies in the best shape possible.
ARE SUGAR AND FAT THE NEW TOBACCO?

You don’t have to look very hard to find conflicting advice regarding many of the things we eat and drink. Coffee is bad because it elevates blood pressure. No, it’s good because it reduces the risk of diabetes and cirrhosis of the liver. Whole wheat is “heart healthy.” Wait…what do you mean it might increase the risk of cardiovascular disease? Eggs increase cholesterol. But did you know they also might protect against certain types of stroke?
Adding the Internet into the mix has only increased the confusion and level of debate. Nearly half the global sample—including two-thirds of Prosumers—say they’re researching health matters online more than they did a couple of years ago. That means they’ve likely encountered plenty of conflicting advice and opinions regarding how they should be treating their bodies.

So what lessons are sticking?

The most agreed-upon body culprits are sugar and excess weight.

Not-So-Sweet Sugar

When we asked about the body-related changes respondents have made in the past year, they were most apt to say they’ve reduced their intake of sugar and fat. Fat has long been the bogeyman in the healthfulness narrative, but it’s getting increasing competition from sugar as people grow more concerned about the sharp rise in diabetes and childhood obesity. The World Health Organization advises people to get no more than 5 percent of their daily calories from sugar. It’s a guideline to which few seem to be adhering. In the UK, a 2012 report from the National Diet and Nutrition Survey found that most adults were getting at least twice the recommended dosage, while those aged 11 to 18 were getting more than 15 percent of their daily calories from the sweet stuff. The situation is much the same in the US, where the CDC found that children get around 15 or 16 percent of their daily caloric intake from sugar, largely from processed foods.
Which of these have you done in the past year? (%)

- Reduced my sugar intake
  - PROSUMER: 54
  - MAINSTREAM: 42

- Reduced my fat intake
  - PROSUMER: 49
  - MAINSTREAM: 38

- Dieted to lose weight
  - PROSUMER: 32
  - MAINSTREAM: 24

- Changed my diet to improve my looks (e.g., clearer skin, shinier hair)
  - PROSUMER: 35
  - MAINSTREAM: 21

- Started a new exercise regimen
  - PROSUMER: 42
  - MAINSTREAM: 28

- Reduced my consumption of meat or poultry
  - PROSUMER: 23
  - MAINSTREAM: 19

- Changed my diet to incorporate more protein
  - PROSUMER: 25
  - MAINSTREAM: 16

- A juice cleanse or other “detox”
  - PROSUMER: 22
  - MAINSTREAM: 15

- Changed my diet to avoid gluten
  - PROSUMER: 14
  - MAINSTREAM: 10

- None of these
  - PROSUMER: 12
  - MAINSTREAM: 25
Mounting opposition to sugar is a real challenge for the food and beverage industry. A 2013 report from investment banking firm Credit Suisse warned that companies should prepare for government-imposed changes—potentially including regulations on sugar-sweetened foods and the levying of steeper “sin taxes”—as well as for consumers’ move toward healthier alternatives.

Coca-Cola is among the companies trying to rethink their strategy for a world that’s beginning to turn against all things sugary. Faced with growing opposition to both sugar-laden soft drinks and artificial sweeteners such as aspartame, the company launched Coca-Cola Life. Made with a mix of sugar and natural sweetener stevia, the drink contains 40 percent fewer calories than a regular Coke. The new product has met with mixed results, but we can be certain that additional attempts to create a less-bad-for-you cola will be under way. At the 10th annual Clinton Global Initiative in late 2014, Coca-Cola and competitors PepsiCo and Dr Pepper Snapple Group pledged to cut the number of sugary drink calories Americans consume by one-fifth over the next decade.

Similarly, makers of children’s breakfast cereals and other sweetened products are attempting to dial back the sugar. General Mills, for instance, has managed to reduce sugar in its Big G children’s cereals by 16 percent since 2007 and is now reducing the sugar content in Yoplait yogurt, Cascadian Farm granola bars, and other snack products.
Facing Off on Fat

In the first half of the 20th century—before researchers began to warn of negative health consequences—it was easy to understand why people would choose to smoke cigarettes. After all, they weren’t marketed simply as glamorous and sophisticated; they came with the assurances of medical experts that smoking would promote everything from a slim figure to good digestion. It was even said to soothe the throat! Today, of course, smokers get no such absolution. Everyone knows that cigarettes are bad for you (and for those around you), the thinking goes, and so there’s no excuse for taking up the habit.

There are signs that the same trajectory may be taking place in regard to overweight and obesity. Yes, food companies peddling their trans fats and empty calories may have to shoulder a bit of the blame, but no one’s forcing anyone to eat those things. Even as arguments rage over which foods are definitely verboten (until they’re not), it’s moved past the point where overweight people are permitted to claim a lack of complicity in their excess poundage. The hashtag #noexcuse is one of the most popular on Instagram.

To understand current attitudes toward weight, we asked respondents whether they agree that most fat people are lazy. The overall sample was quite evenly split among those who agreed (34 percent), those who disagreed (38 percent), and those who didn’t have a clear view on the matter (29 percent). There was one group that stood out on this question, though: Millennials were significantly more apt to equate obesity with laziness (41 percent agreed with the statement, compared with just 30 percent who disagreed). Millennials also were significantly more likely than members of the other age groups to say they prefer to spend time with people who are physically fit rather than overweight. Taken together, these statements suggest that the trend might be moving in the direction of less tolerance for people who continue to overeat and/or avoid the gym. It’s an attitude that’s already firmly in place in certain markets. For instance, in both China and India, a majority of respondents said they prefer not to spend time with people who are above recommended weights.
An interesting indicator of the push toward personal responsibility for one’s weight came from the question about whether respondents would support the development of a pill that would let people lose weight quickly and safely. At a time when obesity’s negative global economic impact is estimated at around $2 trillion annually (nearly on par with the global impact of smoking or armed violence, war, and terrorism), it would seem that a pill to wipe it out would be enthusiastically received. That’s not the case, according to our survey. Barely half the sample (51 percent) agreed that such a pill would benefit society. The implication seems to be that many of us only want to let people have their cake if they’re willing to work it off, too.
It’s one thing to strap on a Fitbit band to track your daily activity or to download an app that reminds you to stick to your diet, but what about using technology to fundamentally alter the human body or its capabilities?

It’s not beyond imagining, especially given how the worlds of medicine and technology are beginning to collide. For evidence, look no further than Arthur Levinson, a biochemist who previously was CEO and then chairman of Genentech and is now chairman of Apple Inc. and CEO of Calico, a Google venture founded with the goal of maximizing the human lifespan. Sound like an odd aspiration for Google? Not so much when you know that another division within the company—the secretive Google X Life Sciences—is attempting to chemically “paint” nanoparticles to allow them to bind to cancer cells and other biomarkers. The idea is that a person could swallow a pill containing these nanoparticles, enabling doctors to monitor for the emergence of disease over his or her lifetime.

The question is: To what extent are people willing to tinker with Mother Nature?

Will we take any and every opportunity to live better longer—or are there limits to what we consider acceptable? We gave our respondents a list of potential scientific advances and asked whether they thought that, in general, each would be good or bad for society. As expected, Prosumers were slightly to significantly more likely to embrace each of these potential developments. They’re proactive in all other areas of their lives, so why not use emerging technologies and scientific breakthroughs to move the species forward?
In general, would each of these developments be good or bad for society?

SHOWING TOTAL GLOBAL SAMPLE

A pill that...

- **50%**
  - **50%** Good
  - **24%** Bad
  - **12%** No Effect
  - **14%** Not Sure

**Lets people lose weight quickly and safely**

- **34%**
  - **34%** Good
  - **33%** Bad
  - **13%** No Effect
  - **20%** Not Sure

- **50%**
  - **50%** Good
  - **24%** Bad
  - **12%** No Effect
  - **14%** Not Sure

**Lets people suppress painful memories**

- **40%**
  - **40%** Good
  - **30%** Bad
  - **13%** No Effect
  - **18%** Not Sure

**Increases one’s IQ**

- **37%**
  - **37%** Good
  - **30%** Bad
  - **17%** No Effect
  - **16%** Not Sure

**Allows people to completely transform how they look**

- **28%**
  - **28%** Good
  - **37%** Bad
  - **13%** No Effect
  - **22%** Not Sure

**Lets people live to age 100 or beyond**

- **23%**
  - **23%** Good
  - **24%** Bad
  - **15%** No Effect
  - **20%** Not Sure

**Lets people change genders (permanently)**

- **15%**
  - **15%** Good
  - **51%** Bad
  - **14%** No Effect
  - **20%** Not Sure

**Lets people look 10 years younger**

- **37%**
  - **37%** Good
  - **30%** Bad
  - **17%** No Effect
  - **16%** Not Sure

**Lets people permanently halt the aging process at the age of their choice**

- **29%**
  - **29%** Good
  - **42%** Bad
  - **11%** No Effect
  - **11%** Not Sure
In general, would each of these developments be good or bad for society?

SHOWING TOTAL GLOBAL SAMPLE (CONTINUED)

- A pill that boosts the IQ of a fetus prior to birth: 26% GOOD, 40% BAD, 13% NO EFFECT, 21% NOT SURE
- A pill that lets a couple choose the sex of their baby prior to conception: 17% GOOD, 53% BAD, 14% NO EFFECT, 16% NOT SURE
- A pill that lets a couple choose their baby’s physical characteristics (e.g., hair color, eye color, height) prior to conception: 14% GOOD, 57% BAD, 13% NO EFFECT, 15% NOT SURE
- Tests that measure an unborn baby’s risk of developing a serious disease during his or her life: 59% GOOD, 17% BAD, 9% NO EFFECT, 15% NOT SURE
- Tests that measure an unborn baby’s intelligence: 22% GOOD, 42% BAD, 18% NO EFFECT, 18% NOT SURE
- The ability to “grow” babies outside a woman’s body: 17% GOOD, 51% BAD, 12% NO EFFECT, 20% NOT SURE
That said, the overall response to these “advances” was tepid at best. Only one received majority approval from the total sample: a pill that lets people lose weight quickly and safely. A near majority of Prosumers and around a third of the mainstream also gave the thumbs-up to a pill that increases IQ and to one that makes people look 10 years younger.

Votes in the “bad” column make it clear that people are in no mood for science that messes with the process of human creation. A majority of the global sample were opposed to the development of a pill that would let couples choose their baby’s gender or other physical characteristics prior to conception. They also rejected the possibility of “growing” babies outside a woman’s body. Nor did they wish to see people gain the ability to radically change themselves once born: A slim majority were opposed to the notion of a pill that allows people to completely transform how they look, and a near majority think it would be a bad idea to create a pill that lets people permanently change genders.

There were distinct differences among countries. For instance, 47 percent of Mexican respondents, compared with just 13 percent of Dutch respondents, approved of a pill that boosts the IQ of a baby prior to birth. This opens the door for scientists and companies to take the lead in certain areas of research in countries whose populations are less wary of genetic manipulation.

One thing is certain: Whether people are for it or against it, some procedures and technologies once relegated to science fiction will ultimately become science fact. Two recently publicized examples: The UK has become the first country to approve a modified in vitro fertilization procedure that allows three people, not two, to create an embryo. The intent is to protect babies from inheriting deadly genetic diseases. And in the US, university researchers have announced that they’ve developed biodegradable nano “drones” that can be injected into the bloodstream to help prevent heart attacks.

These sorts of advances are sure to come as good news for the third of respondents who indicated a wish to be immortal.
If I had the option, I would choose to be immortal   % AGREEING STRONGLY/SOMewhat

<table>
<thead>
<tr>
<th>GENDER</th>
<th>MALE</th>
<th>FEMALE</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>40%</td>
<td>28%</td>
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<tr>
<th>AGE</th>
<th>18–34</th>
<th>35–54</th>
<th>55+</th>
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<tbody>
<tr>
<td>%</td>
<td>39%</td>
<td>31%</td>
<td>24%</td>
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</tbody>
</table>

CONSUMER SEGMENTATION

<table>
<thead>
<tr>
<th>PROSUMER</th>
<th>MAINSTREAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>41%</td>
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</table>
So, people are taking full ownership of their bodies. And they’re seeking to make lifestyle changes with an eye to living healthier longer. What’s the role of brands? As in so many other areas, consumers are looking for brand partners to give them the tools and motivation they need to turn their best intentions into reality. Opportunities for brands are particularly abundant in the following areas.
Designed by Cambridge Sound Technologies in the UK, the Sleep Infuser combines soothing music and sonic pulses to coax the brain into producing the brainwave patterns of healthy sleep. The system is programmable for use at bedtime or for a power nap during the day.

f.lux is a computer app that gradually adjusts the LED lights on one’s computer screen to mimic the light at various times of day. It’s intended to address the issue of brains being tricked into thinking it’s daytime as the electronics user is preparing to call it a night.

The Sleep Number x12 bed comes with SleepIQ technology that monitors the quality of the owner’s sleep, tracking average breathing and heart rates, as well as movement.

HELP PEOPLE CATCH BETTER Zzzzs

Getting a good night’s sleep is being credited for everything from improved memory to smaller waistlines, but it continues to be an elusive goal for many in our modern-day mile-a-minute culture.
As we noted in our 2012 report on health and wellness, people increasingly regard the brain as a vital weapon in the fight against illness and aging—and so they’re always on the lookout for ways to protect and fortify it.

**Muse** is a headband that helps people exercise their brains and improve their attention spans. The product promises to improve the user’s emotional state, stress avoidance, and sense of control.

**Thync** products use neurosignaling in the form of electrical pulses delivered through programs called Vibes. Thync Calm Vibes help the brain relax, while Thync Energy Vibes offer an energy boost. You can select your preferred Vibe via a smartphone app.

**BrainChild Technologies** is developing a pacifier that measures brain development by tracking infants’ sucking reflex. It’s based on the premise that the more a baby sucks, the more engaged it is with a person or activity. Parents can use that information to determine how best to interact with their budding Einsteins.

Subscription boxes are all the rage these days, and so it’s no surprise to see the launch of one that’s brain-focused. The monthly **Better Brain Health Box** delivers foods and drinks that promise to improve concentration and mental acuity.

We’re also seeing more interest in the **brain-boosting benefits** of those sports that rely as much on quick thinking and strategy as on physical reflexes. Among them: fencing, table tennis, and basketball. We can expect more brain-centered marketing from health clubs.

And, of course, there’s a burgeoning market for “brain games” and “brain training” software and apps, such as **Lumosity** (“Discover what your brain can do”) and **Happify** (“Happiness. It’s winnable.”).
As part of its efforts to reduce obesity, the Mexican government has installed at some subway stations motion-sensitive machines that dispense a free ticket to anyone who completes 10 squats. It’s an easier deal than that offered at a station in Moscow prior to the Sochi Olympics, which required that patrons complete 30 squats in two minutes to qualify for a free ride.

Audi has unveiled a concept car that combines luxury and physical fitness. The car’s wellness mode (including “piloted driving technology”) lets the driver and passengers perform isometric exercises to get a complete upper- and lower-body workout while on the road.

More often than not, the major impediment to exercise is a lack of motivation. Enter Charity Miles—a tracking app that donates $0.25 for every mile walked and $0.10 per mile biked to the charity of one’s choice.

Through its VitalityHealth program, UK medical insurance company PruHealth offers discounts and other rewards to policyholders who exercise.

International fitness chain Gold’s Gym has introduced Cardio Cinema, inviting members to watch full-length films while on treadmills rather than while reclining in chairs.
Fooducate is an app that lets you scan food items at the store to find out whether they’re a healthy option. The website also hosts a discussion board on which users exchange advice on healthful food choices.

The HAPIfork is an electronic fork that monitors and tracks eating habits to assist with digestion and weight control. Eating too fast? The gentle vibrations will let you know.

Developed by scientists at the University of California, the WearSens necklace uses sensors triggered by vibrations in the throat to monitor what the user eats and drinks. It will even tell you when you’ve exceeded your targeted daily calorie limit.

Founded in Germany in 2011, HelloFresh is one of a rapidly growing number of companies that deliver a weekly box of meal ingredients to one’s door. Each meal takes no more than 30 minutes to prepare and includes plenty of fresh produce and protein.

The Fresh 20 helps busy households plan a week’s worth of nutritious dinners at a time. Each week, users create a meal plan online that features 20 fresh, in-season ingredients. Add pantry staples, and you’ve got dinner covered without using anything that’s processed or frozen.

More and more people are taking the “You are what you eat” maxim to heart, but it can be tough to stick to a strict diet—and sometimes unclear which foods will help versus hinder one’s fitness plan.
Momoko Hair Shaping technology employs thermal heat and a chemical solution to break the hair’s structural bonds and reestablish them in a new form—permitting wavy hair to be permanently straightened and vice versa.

LightStim uses LED light therapy to “stimulate the body’s natural process to build new proteins and regenerate cells.” The company offers treatments that claim to reduce fine lines and wrinkles, treat and prevent acne breakouts, and temporarily relieve arthritis, muscle, and joint pain.

Want to get rid of that double chin, but not keen on the idea of a facelift? You may soon be in luck: It’s been reported that in the US the FDA will soon approve ATX-101, an injection that targets fat cells to erase double chins. Kythera Biopharmaceuticals hopes to make the injections available in the second half of 2015.
As reported in Adweek, brands such as Kate Spade and L’Oréal are tapping into the “silver economy,” showcasing seniors in their fashion spreads. There’s even a blog celebrating fashionable older women: Advanced Style.

Plus-size retailer Lane Bryant has launched the #ImNoAngel campaign to promote women feeling beautiful, regardless of size. It’s a transparent jab at Victoria’s Secret’s “Perfect Body” campaign, which sparked a petition on Change.org asking the retailer to publicly apologize for promoting an “unhealthy and damaging message” with its super-slim models.

Neon Moon is a feminist lingerie brand created to “design and distribute nonconformist lingerie...for women of all sizes, ethnicities, and body types, including women who embrace pubic, leg, and underarm hair.” Thanks to a successful Kickstarter campaign, the company expects to start shipping its undergarments in October 2015.

Society continues to battle over standards of beauty, now using all manner of hashtags in the effort, especially with regard to weight: #fatshaming, #noexcuses, and #size0 in one corner; #losehatenotweight, #bodypositive, and #Fatkini in the other. Smart brands are getting in on the conversation by embracing a broader definition of beauty.
Designed by Swiss entrepreneur Yves Béhar, Scannadu Scout is a scanner packed with sensors that read one’s vital signs and send them wirelessly to a smartphone. It’s part of a quest, in Béhar’s words, to “make this the last generation to know so little about our health.” How interested are people in the device? In less than a month, a funding campaign with a goal of $100,000 on Indiegogo raised more than $1.6 million. The product began to ship earlier this year.

The Smart Body Analyzer by Withings looks like an ordinary bathroom scale but measures body composition, heart rate, and air quality, in addition to weight.

AliveCor’s AliveECG app lets you give yourself an electrocardiogram (EKG or ECG) wherever and whenever you’d like. The device comes in the form of a smartphone case. Just touch the two metal strips with the fingers of each hand, and the app will measure your heart rate and electrical activity. It will let you know if it detects signs of an impending stroke or heart attack and allows you to share the results with your doctor.

California-based startup Cue is developing a “lab-in-a-box” that lets users track five key health molecules—testing for inflammation, vitamin D, fertility, influenza, and testosterone—by inserting a saliva or nasal swab or a blood sample into a cartridge and receiving a near-instant analysis via smartphone. A “deep health” tracker shares the data with a companion app, which makes lifestyle recommendations based on the findings.

At a time when virtually everything we could possibly want to know is available at our fingertips, people have grown accustomed to wielding the power of that information at retail, in their jobs, and while traveling. Why would we be willing to live in the dark when it comes to our own bodies? For more and more people, the answer is that we’re not. We want to know what’s going on under our hoods—and more companies are stepping in to help.
At this year’s SXSW festival in Austin, Texas, we caught a glimpse of things to come in the area of data monitoring. Among the exhibits was “The PURSUIT by Equinox”—an immersive cycling experience that uses in-studio gaming and data visualization to “drive competition and inspire peak performance.” More than half a million data points are collected during each class, then uploaded to the Equinox mobile app so members can track their progress, set new goals, and compete against friends and others.

Weight Watchers has acquired Weilos, an online fitness and weight-loss community that allows users to post photos of their progress on the site and receive support and tips from fellow dieters and fitness coaches.

Garmin Connect lets people track their workout stats through their Garmin devices and then connect with friends and strangers for feedback and encouragement and to create training groups.

It’s not always easy to find a workout partner who shares your level of fitness, your interests, and your schedule. To the rescue: Workout Buddies—an app that pairs users through such information as fitness level and body type, preferred activities and gym, and schedule. Users who “friend” each other can chat to make arrangements for a joint workout.

Exercise is increasingly becoming about community, social currency, and shared experiences. Witness the surge in popularity of almost cult-like fitness crazes such as Tough Mudder, SoulCycle, and CrossFit. Nike+ was perhaps the first big brand to combine fitness and community, but it’s far from the only one now.
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