

The Philips Center for Health and Well-being



Philips Index for Health and Well-being: A global perspective



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A word about the 'Philips Index for Health and Well-being: A global perspective' from the Center Director

Welcome, and on behalf of Philips, thank you for taking the time to learn more about our report, the 'Philips Index for Health & Well-being: A global perspective'. As the speed of change increases every day, we face many challenges, from responding to the needs of an aging population to increasing urbanization. Philips aspires to a greater understanding of how these issues impact our health and well-being. And, we believe that knowledge sharing can help meet many of those challenges. If we better understand societies and their people, we can improve health and well-being whether it is in Tokyo, Istanbul, Sydney, New York or Mumbai.

There are some intriguing findings -- for example, overall health & well-being in a country does not seem to be linked to higher income or GDP levels -- the countries that feel best about their health & well-being are the United Arab Emirates, the Kingdom of Saudi Arabia and India, whereas those that are less positive include Japan, Turkey and Italy. All over the world, jobs and earnings seem to be some of the main global drivers responsible for reducing our overall sense of health and well-being, whereas personal relationships (alongside our own physical and mental health) rank as the main positive driver. When we look at personal responsibility for health, 90% of us feel a strong sense of responsibility for our own health. However this does not necessarily translate into action - only 42% of us feel as physically fit as we could be for our age.

This study is based on responses from over 30,000 people across 23 countries. It was commissioned by The Philips Center for Health & Well-being. The Center is dedicated to helping improve people's quality of life around the world. It serves as a knowledge-sharing forum to raise the level of discussion on what matters most to citizens and communities. The Center brings together experts for dialogue and debate to overcome barriers and identify solutions that will drive meaningful change in people's health and well-being. Our report provides facts to encourage discussions about health and well-being, whether those conversations happen across the dinner table, at conferences, in classrooms, wherever. We want to further ignite the search for the best answers to the hardest questions about our future well-being.

This is the first of a series of Philips Index for Health & Well-being special reports with a global perspective -- a series through which we will better understand how people, wherever they are in the world, feel about their health and well-being. It is from that understanding that together we can drive positive change for people.



Yours sincerely,

Katy Hartley, Director of The Philips Center for Health & Well-being

www.philips-thecenter.org

I. Introduction

The Philips Index

Philips is a pioneer in developing and bringing to market innovations that shape our healthcare, our lifestyle, and who we are as a society. Doing so means we need to understand the mega-trends in society. These include:

- What is the state of our health and well-being?
- What aspects of health and well-being are most important, and how satisfied are people with each of these aspects of their lives?
- How do countries and regions vary in terms of their attitudes and behaviors toward health and well-being?
- What role do people's lifestyles, age and communities play in their health and well-being?

During 2010, Philips conducted health and well-being research regarding how people in different countries approach health and well-being, and where we are similar and different across the globe. This research has been carried out in 23 countries during 2010. We believe that this understanding will enable us to continue to pioneer products, services and game-changing innovations that will help people, communities, healthcare systems, governments, and future generations address the critical issues surrounding how we live, how content we are, and our own roles in those dimensions of our lives.

II. Survey Methodology

The Overall Approach

This report is based on samples taken from 23 markets globally. Sample sizes, methodology, and weighting were determined on a country-by-country basis to best

reflect the demographic make-up in that country. These differences should be taken into consideration when making cross market comparisons.

Country	Methodology	Field Dates	Sample Size	Representative Of
The Americas				
Brazil	Telephone	February 2010	875	Adults 16+ in city areas
US	Telephone	Nov. 23 – Dec. 7, 2010	1,500	Adults 18+
Europe				
Belgium	Online	May 10 – 20, 2010	1,026	Adults 18+
France	Online	May 21 – 26, 2010	1,005	Adults 18+
Germany	Telephone	June 15 – 25, 2010	1,002	Adults 18+
Italy	Online	July 20 – 27, 2010	1,092	Adults 18-70
Netherlands	Online	May 10 – 24, 2010	1,011	Adults 18+
Poland	TO BE ADDED	TO BE ADDED	983	Adults 18+
Spain	Telephone	March – April, 2010	1,701	Adults 18+
Turkey	Telephone	July 20 – Aug. 11, 2010	1,018	Adults 18+
UK	Online	May 18 – 28, 2010	3,053	Adults 18+
Middle East				
KSA	In-person	June 18 – 30, 2010	1,000	Adults 18-64
UAE	In-person	June 18 – 30, 2010	753	Adults 18-64
Asia				
China	Online (18-50 yrs) In-person (51 yrs +)	Jan. 27 – Feb. 5, 2010	1,573	Adults 18+ living in city areas
Taiwan	Telephone	Aug. 21 – 31, 2010	1,062	Adults 18-64
India	In-person	Aug 23 – Sept 7, 2010	6,299	Adults 18-60 living in city areas
Japan	Online	August 2010	1,000	Adults 18+
Asia Pacific				
Australia	Telephone	July 6 – 20, 2010	1,000	Adults 18+
Indonesia	Telephone	July 17 – Aug. 6, 2010	1,004	Adults 18+
Korea	Telephone	July 17 – Aug. 6, 2010	1,000	Adults 18+
Malaysia	Telephone	July 17 – Aug. 2, 2010	800	Adults 18+
Philippines	Telephone	July 17 – Aug. 6, 2010	1,007	Adults 18+
Singapore	Telephone	July 15 – Aug. 3, 2010	802	Adults 18+
TOTAL SAMPLE			31,566	

¹ Due to accessibility, for research purposes, the sample is comprised of mid to higher income households

² Due to accessibility, for research purposes, the sample is comprised of mid to higher income households

Demographic Breakdown

	Men	Women	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
COMBINED TOTAL ³	50%	50%	15%	23%	21%	18%	12%	15%
The Americas								
Brazil	49%	51%	22%	30%	18%	16%	3%	12%
US	48%	52%	13%	19%	22%	17%	12%	16%
Europe								
Belgium	48%	52%	11%	16%	18%	17%	16%	22%
France	48%	52%	9%	17%	27% ⁴	25% ⁵	N/A	23%
Germany	49%	51%	10%	14%	19%	17%	16%	23%
Italy	49%	51%	10%	23%	27%	23%	17% ⁶	N/A
Netherlands	49%	51%	11%	16%	20%	19%	16%	18%
Poland	48%	52%	13%	20%	16%	17%	16%	18%
Spain	49%	51%	9%	20%	20%	17%	13%	21%
Turkey	50%	50%	14%	26%	23%	17%	11%	10%
UK	48%	52%	10%	16%	20%	16%	15%	21%
Middle East								
KSA	60%	40%	30%	34%	21%	10%	4%	N/A
UAE	60%	40%	25%	35%	26%	12%	1%	N/A
Asia								
China	50%	50%	8%	24%	24%	19%	12%	13%
Taiwan	50%	50%	15%	24%	22%	24%	15%	N/A
India	47%	62%	17%	30%	28%	17%	9% ⁷	N/A
Japan	50%	50%	6%	20%	18%	18%	25%	14%
Asia Pacific								
Australia	50%	50%	13%	18%	19%	18%	15%	17%
Indonesia	50%	50%	20%	26%	22%	16%	9%	7%
Korea	50%	50%	15%	23%	25%	25%	11%	2%
Malaysia	50%	50%	21%	24%	19%	18%	12%	7%
Philippines	50%	50%	23%	25%	20%	15%	9%	7%
Singapore	49%	51%	12%	20%	22%	21%	14%	11%

³ The sample is large enough to allow for sub-group analysis.

⁴ Figure is representative of 35—49 year-olds, this is how age data was captured in France

⁵ Figure is representative of 50—64 year-olds, which how age data was captured in France

⁶ Figure is representative of 55-70 year-olds, which was the oldest age segment surveyed in Italy

⁷ Figure is representative of 55-60 year-olds, which was the oldest age segment surveyed in India

The Overall Approach

- The Combined Total sample and country comparisons are provided throughout this report. The combined total is an un-weighted average of all markets that asked a question and/or response option.
- Throughout the analysis, significant differences have been identified and highlighted where relevant across gender, age and market / region.
 - For example, markets highlighted with green are significantly higher than the combined total, while markets highlighted in red are significantly below the combined total.
 - Significant differences across demographics are circled within this report.
- Throughout the report, D/K (Don't know) answer options have been excluded. As a result, percentages may not always add to 100.
- Please note that not all questions and answer options were included in all markets. Accordingly, N/As have been added to figures and tables when this is the case.
 - Any differences in questions or responses have been notated throughout the report.
- Countries are grouped together within charts and figures based on Philips' perspective on markets and regions.
- It should be noted that one should be careful when drawing firm hypotheses due to slight differences in sampling across markets included in this report.

III. General State of Global Health and Well-being

III a. Overall

Current State of Health and Well-being

For the most part, feelings of health and well-being are strong across the globe. However, the UK, China, Taiwan and Japan are the least likely to say they are feeling good or very good. China and Taiwan, in particular, are the

markets most likely to say they are not doing well from a health and well-being perspective. In Indonesia, there is strong polarization since people are just as likely to feel good about their health and well-being as not.

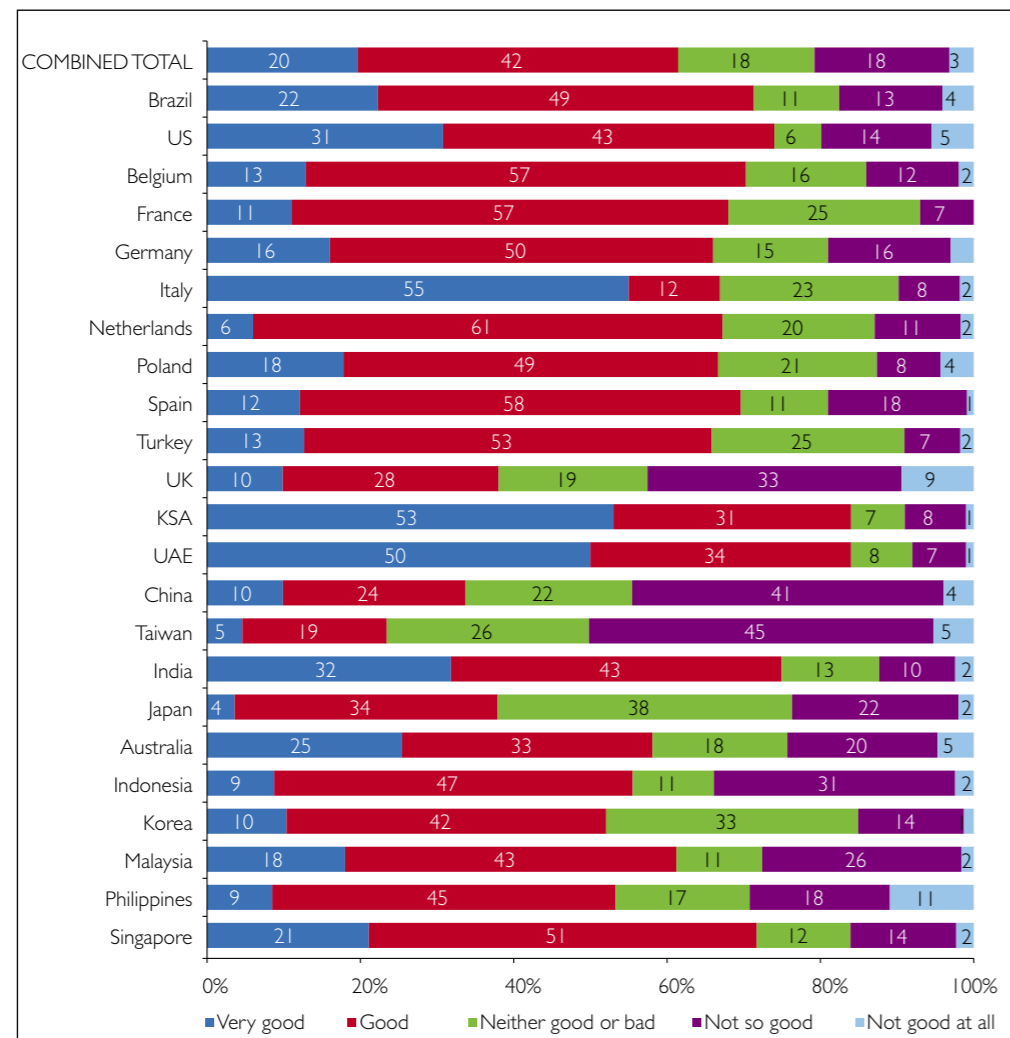


Figure 1: How would you rate your overall feeling of health and well-being? Q1

Changes in Health and Well-being

Evolution of sentiment towards health and well-being varies across region. Emerging markets, such as the Kingdom of Saudi Arabia, United Arab Emirates and India claim to have had the best improvement in their feelings of health and well-being compared to five years ago. In

Europe, those living in Belgium, France, and Italy are most likely to say their feelings have got worse over the last five years. In Asia, the Japanese and Taiwanese are most likely to feel this way too.

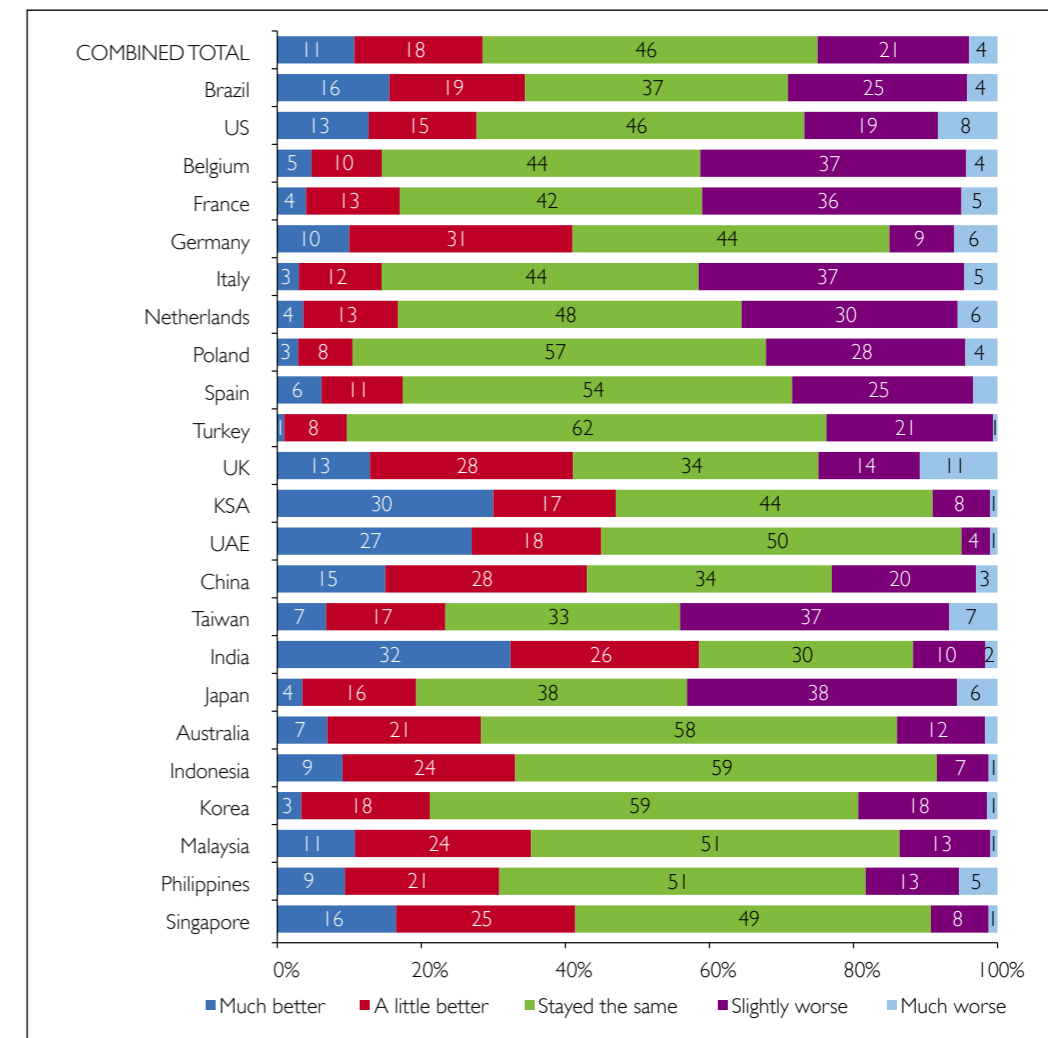


Figure 2: Would you say your feeling of health and well-being has got much worse, slightly worse, stayed the same, got a little better, or got much better in the last five years? Q2

III b. The Philips Index

What is the Philips Index?

The Philips Index is an analysis that weights overall satisfaction with various components of health and well-being by their relative stated importance. Rather than merely asking how one feels, the Index weights 17 components tied to health and well-being. Doing so allows the opportunity to isolate drivers and satisfaction

relative to components that are considered important. In addition to the Overall Health and Well-being Index, sub-indices were created to examine Physical Health, Well-being, Job, Friends and Family, and Community. These indices are found throughout this report.

How are the Indices Calculated?

Using survey questions three (stated importance) and question four (satisfaction), OneVoice Measurement multiplied the average stated importance against average satisfaction. More specifically:

- Total Index = the average of Q3 (stated importance) x Q4 (satisfaction) across all drivers to health and well-being (1-17). Those drivers are:
 - o Your job
 - o How much you earn
 - o How much you weigh
 - o Your overall physical health
 - o Your mental health
 - o The community you live in
 - o Your relationship with your family and friends
 - o How much stress you have
 - o The place of worship you attend, if any
 - o How much you contribute to your community
 - o The overall physical health of family members
 - o Your relationship with your spouse or partner
 - o Your relationship with your boss and coworkers
 - o The cost of living
 - o The amount of vacation time you have
 - o The amount free time you have to spend friends and family
 - o The amount free time you can spend alone

- Job Index = the average of Q3 (stated importance) x Q4 (satisfaction) across the following items:
 - o Your job, how much you earn, your relationship with your boss and coworkers and the amount of vacation you have.
- Community Index = the average of Q3 (stated importance) x Q4 (satisfaction) across the following items:
 - o The community you live in, how much you contribute to your community and the cost of living.
- Physical Index = the average of Q3 (stated importance) x Q4 (satisfaction) across the following items:
 - o How much you weigh and your physical health.
- Emotional Health Index = the average of Q3 (stated importance) x Q4 (satisfaction) across the following items:
 - o Your mental health, how much stress you have, the place of worship you attend, if any and how much free time you can spend alone.
- Family/Friends Index = the average of Q3 (stated importance) x Q4 (satisfaction) across the following items:
 - o Your relationship with family and friends, the overall physical health of family members, your relationship with your spouse or partner and the amount of free time you have to spend with family and friends.

III b. The Philips Index (c'td)

Relative to the Combined Overall Health and Well-being Index (the average of the Index in each of the 23 countries), emerging markets in the Middle East, India and Singapore are doing better from a health and well-being perspective when compared to some of the

world's more developed economies. Additionally, while Italy and the US initially perceive themselves to have good levels of health and well-being, when taking into account factors that drive health and well-being they are doing less well than initially stated.

State of Health and Well-being (very good/good)		Overall Health and Well-being Index
COMBINED TOTAL	62%	57%
The Americas		
Brazil	71%	54%
US	74%	55%
Europe		
Belgium	70%	55%
France	68%	55%
Germany	66%	52%
Italy	67%	34%
Netherlands	67%	59%
Poland	67%	64%
Spain	70%	54%
Turkey	66%	34%
UK	38%	45%
Middle East		
KSA	84%	78%
UAE	84%	88%
Asia		
China	34%	60%
Taiwan	23%	54%
India	75%	72%
Japan	38%	27%
Asia Pacific		
Australia	58%	65%
Indonesia	56%	55%
Korea	52%	66%
Malaysia	61%	71%
Philippines	53%	45%
Singapore	72%	68%

III c. Drivers of Health and Well-being

After physical and emotional health drivers, the cost of living and key relationships are strong influencers on health and well-being. However, large gaps exist between the importance of the effect certain aspects of life have on feelings of well-being and the level of satisfaction people

have with each. Across the globe, the largest gaps exist with how much people earn and the cost of living two components that are strongly correlated. Other large gaps exist with aspects of physical health and how much stress people have in their lives.

	Combined Total Importance	Combined Total Satisfaction	GAP	RANK
Job/Career Drivers				
How much you earn	77%	56%	-20%	2
Your job	74%	65%	-9%	7
The amount of vacation time you have	71%	66%	-4%	11
Your relationship with your boss and coworkers	69%	67%	-1%	15
Community Drivers				
The cost of living	83%	55%	-28%	1
The community you live in	81%	78%	-3%	12
How much you contribute to your community	62%	71%	9%	16
Physical Health Drivers				
Your overall physical health	92%	74%	-18%	3
How much you weigh	77%	63%	-14%	5
Emotional Health Drivers				
How much stress you have	81%	63%	-18%	3
Your mental health	91%	83%	-9%	7
The amount free time you can spend alone	78%	75%	-3%	12
Religious services or practice you attend, if any	55%	73%	18%	17
Friends and Family Drivers				
The overall physical health of family members	90%	81%	-10%	6
The amount free time you have to spend with friends and family	84%	76%	-8%	9
Your relationship with your spouse or partner	82%	78%	-5%	10
Your relationship with your family and friends	90%	87%	-3%	12

Table 4: For each of the following, how important are they in affecting your health and well-being? VERY IMPORTANT/ IMPORTANT. For each of the following, how satisfied are you with this aspect of your life? COMPLETELY SATISFIED/ SATISFIED.Q3/Q4

Feelings of Health and Well-being Impact Several Aspects of People's Lives

Globally

How one feels has a direct impact on other aspects of one's life. Globally, relationships with friends/family and the overall physical health of family members are

impacted most by one's own state of health and well-being. These effects are felt most strongly by women.

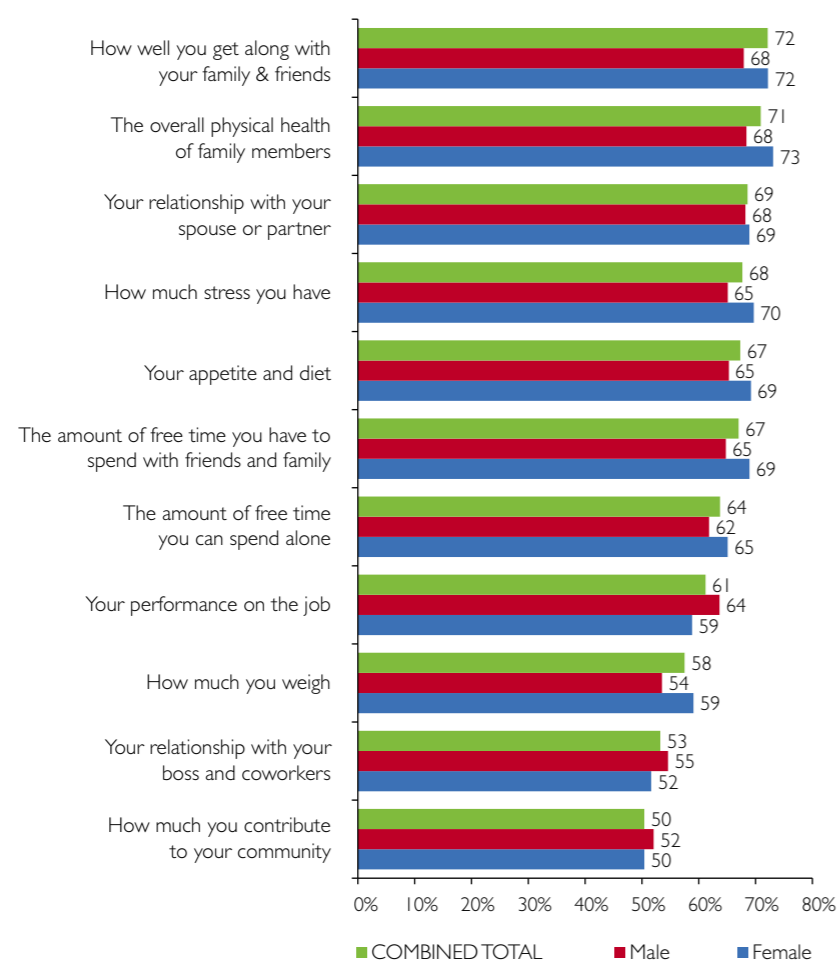


Figure 3: How much does your feeling of health and well-being affect the following aspects of your life? GREATLY/ TO SOME DEGREE Q5

Drivers of Health and Well-being: Job/Career

When looking at financial drivers, large gaps exist globally between their importance and satisfaction; these gaps are largest when it comes to how much people earn. The Japanese, Taiwanese, and Brazilians

are most dissatisfied with what they earn. However, in every region covered there are key markets with strong dissatisfaction gaps.

GAP IN SATISFACTION and IMPORTANCE [§]				
	Your job	How much you earn	Relationship with coworkers and boss	Amount of vacation time you have
COMBINED TOTAL	-9%	-20%	-1%	-5%
The Americas				
Brazil	-31%	-45%	-6%	-11%
US	-20%	-36%	-15%	-11%
Europe				
Belgium	0%	-8%	5%	3%
France	3%	-20%	15%	16%
Germany	-12%	-32%	-10%	-8%
Italy	-9%	-16%	10%	-8%
Netherlands	1%	-18%	6%	7%
Poland	-5%	-31%	-4%	-10%
Spain	-4%	-15%	2%	-2%
Turkey	45%	46%	54%	34%
UK	-17%	-33%	-9%	-18%
Middle East				
KSA	1%	1%	1%	-2%
UAE	-2%	-5%	0%	-3%
Asia				
China	3%	-21%	9%	2%
Taiwan	-28%	-45%	-11%	-25%
India	0%	-6%	-3%	-3%
Japan	-41%	-67%	-32%	-22%
Asia Pacific				
Australia	-5%	-6%	-1%	-2%
Indonesia	-30%	-36%	-21%	-21%
Korea	-25%	-39%	-11%	-19%
Malaysia	9%	1%	11%	6%
Philippines	-24%	-22%	-16%	1%
Singapore	-11%	-18%	-4%	-12%

Table 5: For each of the following, how important are they in affecting your health and well-being? VERY IMPORTANT/IMPORTANT. For each of the following, how satisfied are you with this aspect of your life? COMPLETELY SATISFIED/SATISFIED. Q3/Q4
[§]N/A indicates that a response category was not part of a country's Philips Index Survey

Drivers of Health and Well-being: Community

Regardless of geography there are high levels of dissatisfaction with the current cost of living. This sentiment is felt most strongly by those within the

developed nations, and in particular, some of the world's stock market centers (US, UK and Japan) where over half the population is dissatisfied.

GAP IN SATISFACTION and IMPORTANCE ⁹			
	Community you live in	How much you contribute to you community	The cost of living
COMBINED TOTAL	-3%	9%	-28%
The Americas			
Brazil	-11%	6%	-42%
US	-12%	-18%	-54%
Europe			
Belgium	-8%	37%	-33%
France	N/A	N/A	-48%
Germany	-9%	-6%	-33%
Italy	12%	30%	-26%
Netherlands	-5%	25%	-20%
Poland	0%	12%	-38%
Spain	0%	5%	-41%
Turkey	49%	65%	30%
UK	-8%	13%	-57%
Middle East			
KSA	-1%	3%	-6%
UAE	0%	2%	-18%
Asia			
China	-2%	N/A	-12%
Taiwan	-13%	28%	-37%
India	0%	-1%	-4%
Japan	-20%	3%	-65%
Asia Pacific			
Australia	1%	6%	-9%
Indonesia	-23%	-23%	-35%
Korea	-10%	-8%	-33%
Malaysia	6%	11%	-5%
Philippines	4%	2%	-20%
Singapore	-6%	-6%	-30%

Table 6: For each of the following, how important are they in affecting your health and well-being? VERY IMPORTANT/IMPORTANT.

For each of the following, how satisfied are you with this aspect of your life? COMPLETELY SATISFIED/SATISFIED. Q3/Q4

⁹ N/A indicates that a response category was not part of a country's Philips Index Survey

Drivers of Health and Well-being: Physical Health

By and large, dissatisfaction with weight is a common theme across markets. With the exception of the Philippines, there is a strong correlation between a

country's citizens' satisfaction with weight and their satisfaction with their overall physical health.

GAP IN SATISFACTION and IMPORTANCE ¹⁰		
	How much you weigh	Your overall physical health
COMBINED TOTAL	-14%	-18%
The Americas		
Brazil	-31%	-25%
US	-23%	-27%
Europe		
Belgium	-32%	-30%
France	-12%	-14%
Germany	-17%	-27%
Italy	-5%	-4%
Netherlands	-38%	-33%
Poland	-2%	-17%
Spain	1%	-8%
Turkey	41%	42%
UK	-43%	-47%
Middle East		
KSA	-6%	-3%
UAE	-5%	-2%
Asia		
China	15%	-13%
Taiwan	-37%	-39%
India	-4%	-4%
Japan	-53%	-64%
Asia Pacific		
Australia	-8%	-13%
Indonesia	-27%	-29%
Korea	-32%	-18%
Malaysia	-5%	0%
Philippines	15%	-19%
Singapore	-10%	-15%

Table 7: For each of the following, how important are they in affecting your health and well-being? VERY IMPORTANT/IMPORTANT.

For each of the following, how satisfied are you with this aspect of your life? COMPLETELY SATISFIED/SATISFIED. Q3/Q4

¹⁰ N/A indicates that a response category was not part of a country's Philips Index Survey

¹¹ Due to cultural reasons, in China and Taiwan this question was phrased as "Do you consider yourself to be in a state of sub-health?"

Drivers of Health and Well-being: Emotional Health

With few exceptions, people worldwide are dissatisfied with the amount of stress they have in their lives (relative to the importance it plays to their well-being). Developed markets, such as the US,

Belgium, UK, and Japan have the largest gaps when it comes to stress. Among emerging markets, both the Philippines and Taiwan are strongly dissatisfied with current stress levels.

GAP IN SATISFACTION and IMPORTANCE ¹²				
	Your mental health	How much stress you have	Amount of free time you have to spend alone	Place of worship you attend, if any
COMBINED TOTAL	-9%	-18%	-3%	18%
The Americas				
Brazil	-14%	-21%	-6%	5%
US	-14%	-31%	-13%	-6%
Europe				
Belgium	-15%	-30%	1%	58%
France	2%	-17%	18%	51%
Germany	-19%	-4%	10%	11%
Italy	10%	-25%	9%	37%
Netherlands	-21%	-17%	-4%	53%
Poland	-5%	-15%	-9%	15%
Spain	-1%	-12%	7%	7%
Turkey	32%	10%	52%	64%
UK	-18%	-34%	-15%	N/A
Middle East				
KSA	0%	0%	5%	6%
UAE	1%	-4%	-3%	1%
Asia				
China	-3%	-3%	1%	N/A
Taiwan	-24%	-39%	-18%	30%
India	-3%	-5%	1%	1%
Japan	-59%	-63%	-36%	18%
Asia Pacific				
Australia	-5%	-13%	-8%	2%
Indonesia	-25%	-26%	-25%	-19%
Korea	-13%	-26%	-20%	3%
Malaysia	7%	6%	6%	15%
Philippines	-3%	-30%	-6%	24%
Singapore	-6%	-10%	-9%	-2%

Table 8: For each of the following, how important are they in affecting your health and well-being? VERY IMPORTANT/IMPORTANT. For each of the following, how satisfied are you with this aspect of your life? COMPLETELY SATISFIED/SATISFIED. Q3/Q4

¹² N/A indicates that a response category was not part of a country's Philips Index Survey

Drivers of Health and Well-being: Friends and Family

The largest gap as it relates to friends and family has to do with the amount of free time people get with the people that are most important to them. This

is consistent from market to market, with only Italy and Turkey feeling satisfied with the time they have available to spend with friends and family.

GAP IN SATISFACTION and IMPORTANCE ¹³				
	Relationship with your family and friends ¹⁴	Overall physical health of family members	Relationship with your partner or spouse	The amount of free time you have to spend with friends and family
COMBINED TOTAL	-3%	-9%	-5%	-8%
The Americas				
Brazil	-6%	-14%	-7%	-18%
US	-12%	-24%	-7%	-26%
Europe				
Belgium	-1%	-6%	-7%	-9%
France	10%	-2%	-1%	0%
Germany	-5%	-22%	-9%	-23%
Italy	21%	10%	12%	8%
Netherlands	-5%	-13%	-6%	-4%
Poland	0%	-7%	-2%	-6%
Spain	0%	-5%	-2%	-7%
Turkey	48%	41%	43%	49%
UK	-7%	-19%	-13%	-18%
Middle East				
KSA	3%	2%	2%	4%
UAE	-1%	-1%	0%	-1%
Asia				
China	4%	-8%	-1%	-1%
Taiwan	-14%	-23%	-14%	-22%
India	0%	-2%	0%	-1%
Japan	-34%	-44%	-35%	-34%
Asia Pacific				
Australia	-6%	-2%	-5%	-7%
Indonesia	-19%	-20%	-20%	-25%
Korea	-5%	-9%	-8%	-24%
Malaysia	7%	3%	5%	4%
Philippines	-11%	-38%	-23%	-17%
Singapore	-6%	-14%	-7%	-11%

¹³ N/A indicates that a response category was not part of a country's Philips Index Survey

¹⁴ In Brazil, China, France, India, KSA, Poland and UAE, figures for related to family and friends are representative of a combined average because in those markets that component was asked separately

Key drivers¹⁵ of Health and Well-being: Developed Markets¹⁶

Among developed markets, the two drivers of health and well-being that each market have in common are 'overall physical health,' and 'mental health.' Key differences exist among European markets. In Spain, France and Germany, drivers are financially driven,

while in the UK, Netherlands and Belgium, drivers are focused on stress and health. In Australia, Korea, and Singapore, personal relationships are the key drivers to well-being.



¹⁵ Based on a correlation analysis of data from 20 countries using the core 17 variables asked in most countries; SPSS files were not available for all markets at time of the analysis

¹⁶ Definitions of Developed vs. Emerging markets are based on the International Monetary Fund's "World Economic Outlook" report, released April 2010

Key drivers¹⁷ of Health and Well-being: Emerging Markets¹⁸

While only one common driver exists across all emerging markets ('overall physical health'), there are similar drivers to well-being by region. Most notably, maintaining healthy personal relationships—either with family, friends, or spouse/partners—is key to

people's well-being among the world's emerging economies. Additionally, emerging countries have several drivers deemed key to its citizen's well-being compared to developed nations, including mental health and stress.



¹⁷ Based on a correlation analysis of data from 20 countries using the core 17 variables asked in most countries; SPSS files were not available for all markets at time of the analysis

¹⁸ Definitions of Developed vs. Emerging markets are based on the International Monetary Fund's "World Economic Outlook" report, released April 2010

IV. Healthy Lifestyle

Sidebar: Relationships

In the vast majority of cases, people are more satisfied with their relationship with their friends and family compared with their spouse or partner. This is

particularly true for Filipinos and Japanese who are the least satisfied with their relationship with their spouse or partner.

SATISFACTION WITH RELATIONSHIPS			
	Relationship with your spouse or partner	Relationship with your boss/coworkers	Relationship with your family and friends ¹⁹
COMBINED TOTAL	78%	67%	87%
The Americas			
Brazil	75%	72%	81%
US	71%	53%	86%
Europe			
Belgium	83%	72%	91%
France	83%	77%	93%
Germany	69%	57%	89%
Italy	73%	58%	82%
Netherlands	84%	74%	89%
Poland	79%	58%	96%
Spain	87%	76%	96%
Turkey	90%	86%	91%
UK	66%	43%	85%
Middle East			
KSA	87%	77%	95%
UAE	91%	86%	99%
Asia			
China	85%	83%	89%
Taiwan	73%	70%	81%
India	83%	59%	92%
Japan	50%	32%	55%
Asia Pacific			
Australia	81%	75%	84%
Indonesia	66%	55%	76%
Korea	88%	79%	90%
Malaysia	90%	83%	96%
Philippines	52%	51%	78%
Singapore	84%	75%	91%

Table 10: For each of the following, how important are they in affecting your health and well-being? VERY IMPORTANT/IMPORTANT. For each of the following, how satisfied are you with this aspect of your life? COMPLETELY SATISFIED/SATISFIED. Q3/Q4

¹⁹ In Brazil, China, France, India, KSA, Poland, and UAE, figures for relationship with family and friends are representative of a combined average because in those markets that component was asked separately

IV a. The Role of People's Lifestyle

Philips Index Components: Physical and Emotional Health

With a few exceptions, most markets are doing well from a physical health standpoint. Gender differences tend to be small; in cases where gaps exist, women's

lower scores are driven by their dissatisfaction with their weight relative to the important role it plays to their physical well-being.

	PHYSICAL HEALTH INDEX ²⁰			EMOTIONAL HEALTH INDEX ²¹		
	Overall	Men	Women	Overall	Men	Women
COMBINED TOTAL	58%	60%	57%	58%	57%	58%
The Americas						
Brazil	50%	56%	44%	57%	58%	56%
US	59%	63%	54%	59%	60%	58%
Europe						
Belgium	51%	52%	49%	48%	48%	48%
France	57%	57%	57%	48%	45%	51%
Germany	58%	59%	56%	43%	43%	43%
Italy	43%	43%	43%	35%	33%	36%
Netherlands	69%	68%	69%	76%	74%	78%
Poland	53%	57%	49%	51%	51%	50%
Spain	62%	63%	60%	44%	42%	45%
Turkey	33%	30%	36%	36%	34%	38%
UK	40%	45%	35%	61%	62%	60%
Middle East						
KSA	84%	88%	79%	82%	80%	84%
UAE	93%	94%	91%	94%	94%	94%
Asia						
China	56%	55%	56%	61%	60%	63%
Taiwan	43%	45%	41%	53%	53%	54%
India	84%	85%	83%	74%	73%	74%
Japan	24%	23%	24%	26%	23%	29%
Asia Pacific						
Australia	66%	68%	64%	68%	68%	67%
Indonesia	56%	57%	56%	56%	57%	55%
Korea	69%	72%	66%	62%	60%	65%
Malaysia	70%	71%	67%	73%	73%	73%
Philippines	55%	51%	58%	51%	47%	54%
Singapore	70%	74%	67%	68%	70%	67%

²⁰ Physical Health Index=average of Q3 (stated importance) × Q4 (satisfaction): how much you weigh and your physical health

²¹ Emotional Health Index=average of Q3 (stated importance) × Q4 (satisfaction): your mental health, how much stress you have, place of worship you attend, if any, and how much free time you can spend alone

Philips Index Components: Work/Life Balance

Interestingly, some of the world's financial centers have the world's lowest Job Index scores. These below average scores could be driven by a poor balance between work life and home life in the US, UK, and

Japan. Friends and family, relative to other Index scores in each market, are high across the globe. These scores are a reflection of the important role personal relationships play to people's sense of health and well-being.

	JOB INDEX ²²			FRIENDS and FAMILY INDEX ²³		
	Overall	Men	Women	Overall	Men	Women
COMBINED TOTAL	46%	50%	43%	70%	69%	70%
The Americas						
Brazil	50%	56%	44%	57%	58%	56%
US	59%	63%	54%	59%	60%	58%
Europe						
Belgium	51%	52%	49%	48%	48%	48%
France	57%	57%	57%	48%	45%	51%
Germany	58%	59%	56%	43%	43%	43%
Italy	43%	43%	43%	35%	33%	36%
Netherlands	69%	68%	69%	76%	74%	78%
Poland	53%	57%	49%	51%	51%	50%
Spain	62%	63%	60%	44%	42%	45%
Turkey	33%	30%	36%	36%	34%	38%
UK	40%	45%	35%	61%	62%	60%
Middle East						
KSA	84%	88%	79%	82%	80%	84%
UAE	93%	94%	91%	94%	94%	94%
Asia						
China	56%	55%	56%	61%	60%	63%
Taiwan	43%	45%	41%	53%	53%	54%
India	84%	85%	83%	74%	73%	74%
Japan	24%	23%	24%	26%	23%	29%
Asia Pacific						
Australia	66%	68%	64%	68%	68%	67%
Indonesia	56%	57%	56%	56%	57%	55%
Korea	69%	72%	66%	62%	60%	65%
Malaysia	70%	71%	67%	73%	73%	73%
Philippines	55%	51%	58%	51%	47%	54%
Singapore	70%	74%	67%	68%	70%	67%

²² Job Index=average of Q3 (stated importance) x Q4 (satisfaction): your job, how much you earn, your relationship with your boss and coworkers, and the amount of vacation time you have

²³ Friends and Family Index=average of Q3 (stated importance) x Q4 (satisfaction): your relationship with family and friends, overall physical health of family members, relationship with your spouse or partner; the amount of free time you have to spend with family and friends

Overall, People Have a Positive Body Image²⁴

Generally, most people don't consider themselves to be overweight despite national data from health organizations that reveal data to the contrary. Countries in the Americas and Europe are most likely to say

they are overweight. In both China and Taiwan, half believe they are in a state of subhealth (for cultural and translation reasons the term 'subhealth' was used in China and Taiwan).

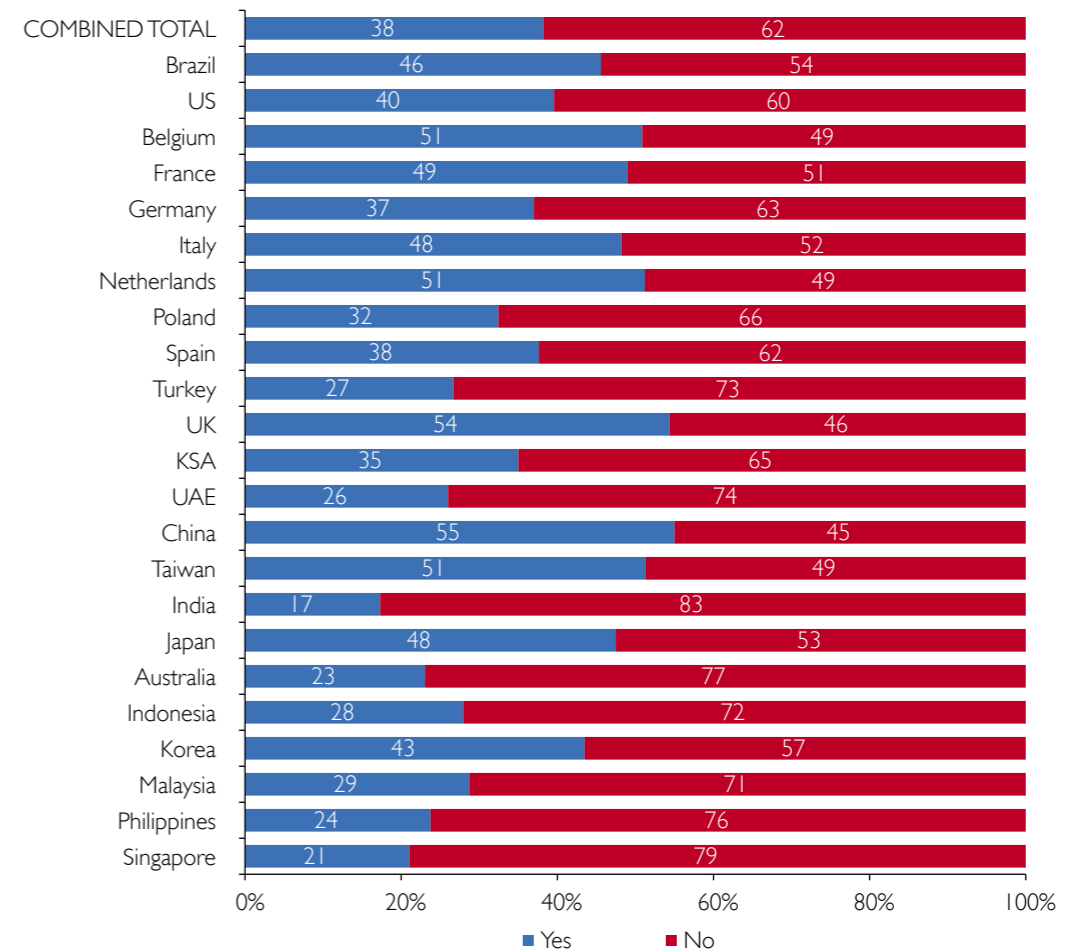


Figure 6: Do you consider yourself to be overweight? Q21

²⁴ Due to cultural reasons, in China and Taiwan this question was phrased as "Do you consider yourself to be in a state of sub-health?"

Across markets, most people who do want to lose weight only want to lose between 1 and 5 kilograms. People living in the US along with several European markets like Spain and the UK, are most likely to want

to lose 10 kilograms or more. Even though a high number of people in Japan and Korea believe they are overweight, very few believe that they need to lose a significant amount of weight.

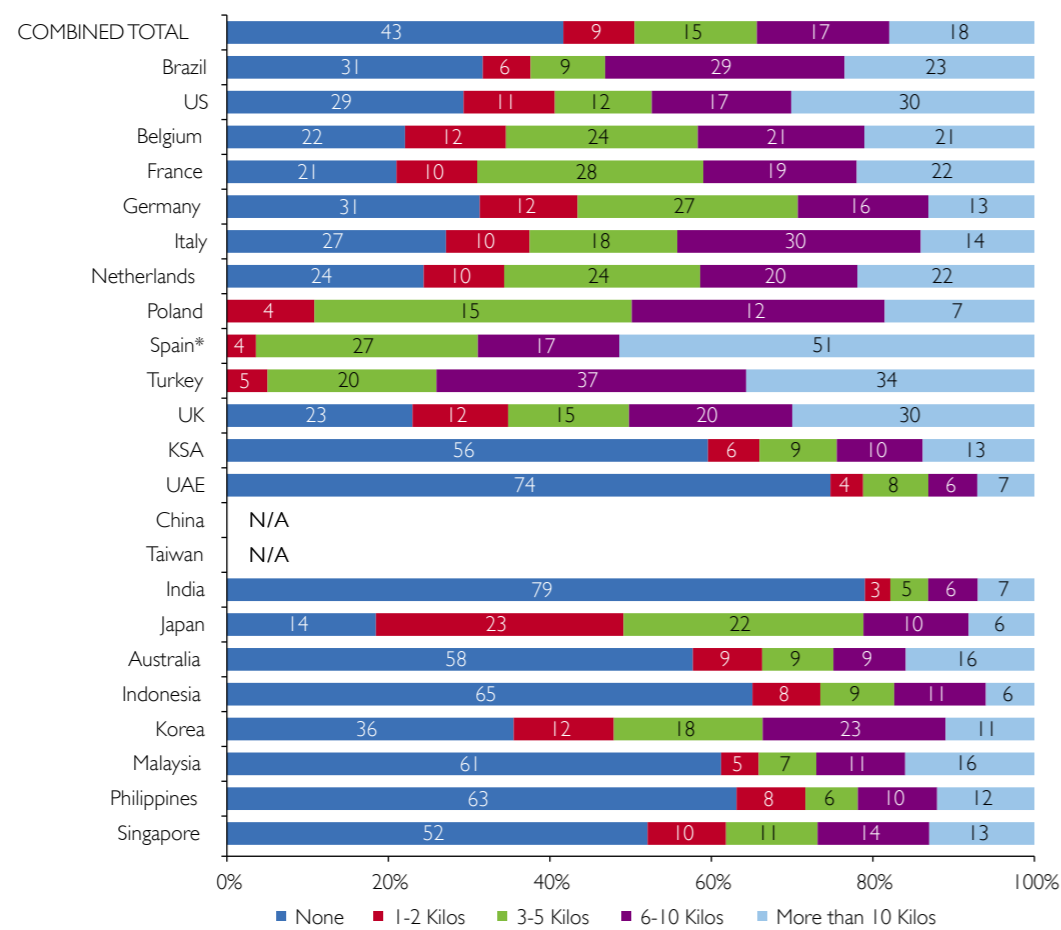


Figure 7: How much weight are you trying to or would you like to lose? Q22²⁵
²⁵This question was not asked in China and Taiwan. Countries marked with an asterisk (*) asked this question in different weight ranges.

Most Would Use a Combination of Diet and Exercise to Lose Weight

Just over half of our global sample would increase their exercise regimen when trying to lose weight. Interestingly, people would rather give up sweets, salty snacks and junk food than alcohol when trying

to lose weight. While there is little difference in the approach men and women would take towards losing weight globally, women are slightly more likely to cut back food consumption than are men.

	COMBINED TOTAL ²⁶	Men	Women
Increase exercise	54%	45%	43%
Eat lower fat	38%	36%	41%
Eat lower calories	35%	31%	36%
Stop/cut down eating sweets	30%	25%	32%
Eat lower carbohydrates	25%	24%	28%
Stop/cut down eating salty snacks	22%	20%	24%
Stop/cut down eating fast food	22%	22%	25%
Not interested in losing weight	18%	20%	15%
Use an exercise device	16%	16%	16%
Consume less alcohol ²⁷	14%	15%	13%
Go on Weight Watchers or other diet program	11%	12%	16%
Use diet aids or supplements	7%	6%	8%
Consider surgery	3%	2%	3%
Other	2%	2%	3%
Nothing works for me	2%	2%	2%

Table 14: If you wanted to lose weight, which of the following would you do? Q23
²⁶ Questions 23 was not asked in France and Germany
²⁷ "Consume less alcohol" was not given as an option to respondents in KSA, UAE, Indonesia, and Malaysia

Many People Across the Globe Aren't Getting Enough Sleep

While sleep patterns vary, in most markets large portions of society don't feel they are getting enough sleep on a daily basis (most notably those living in France and Taiwan). Even those in UAE,

Turkey and India who are least likely to say they aren't getting enough sleep still have one in ten of the citizens who feel sleep deprived.

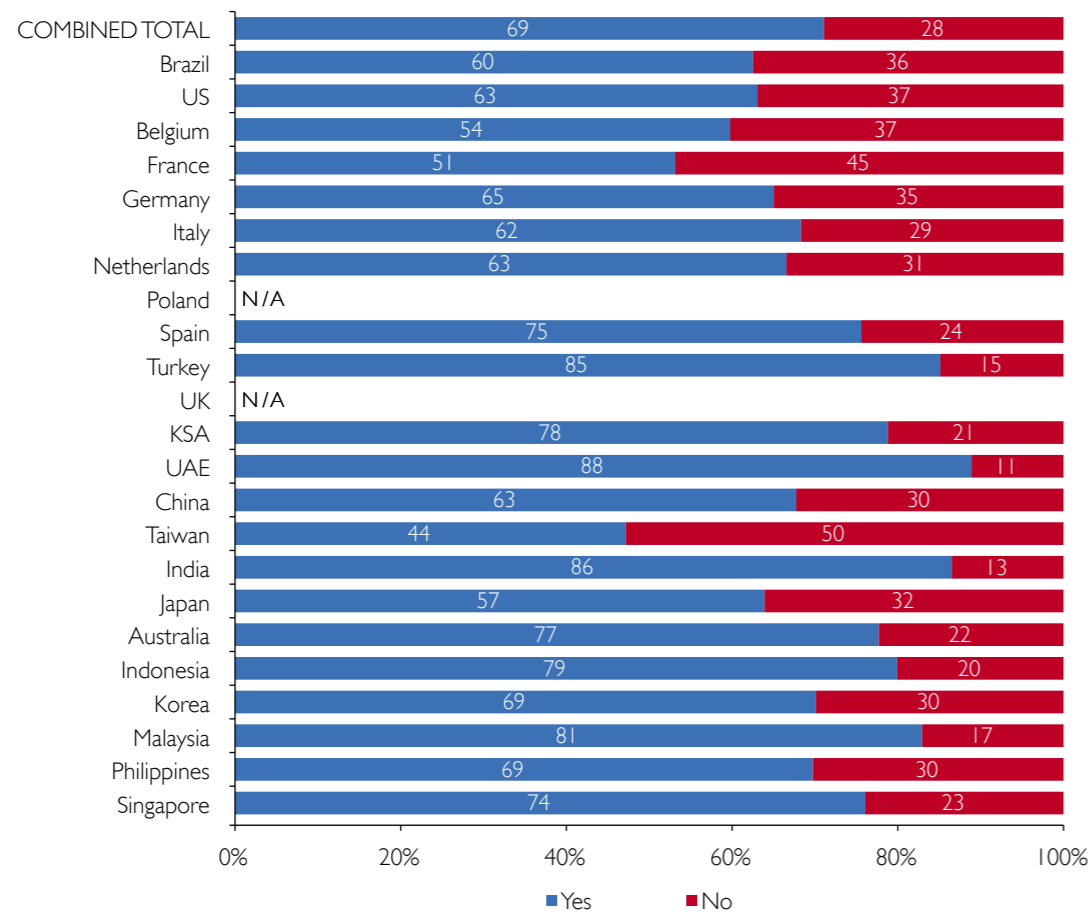


Figure 8: Do you get enough sleep at night? Q24
²⁸Question not asked in this manner in the UK or Poland.

Reasons for Lack of Sleep: Globally

Going to bed late and having to wake up early in the morning is the number one reason across markets as to why people don't get the sleep they need.

Snoring, sleep apnea, and other health conditions, while impacting some, appear to have little effect on sleeping patterns.

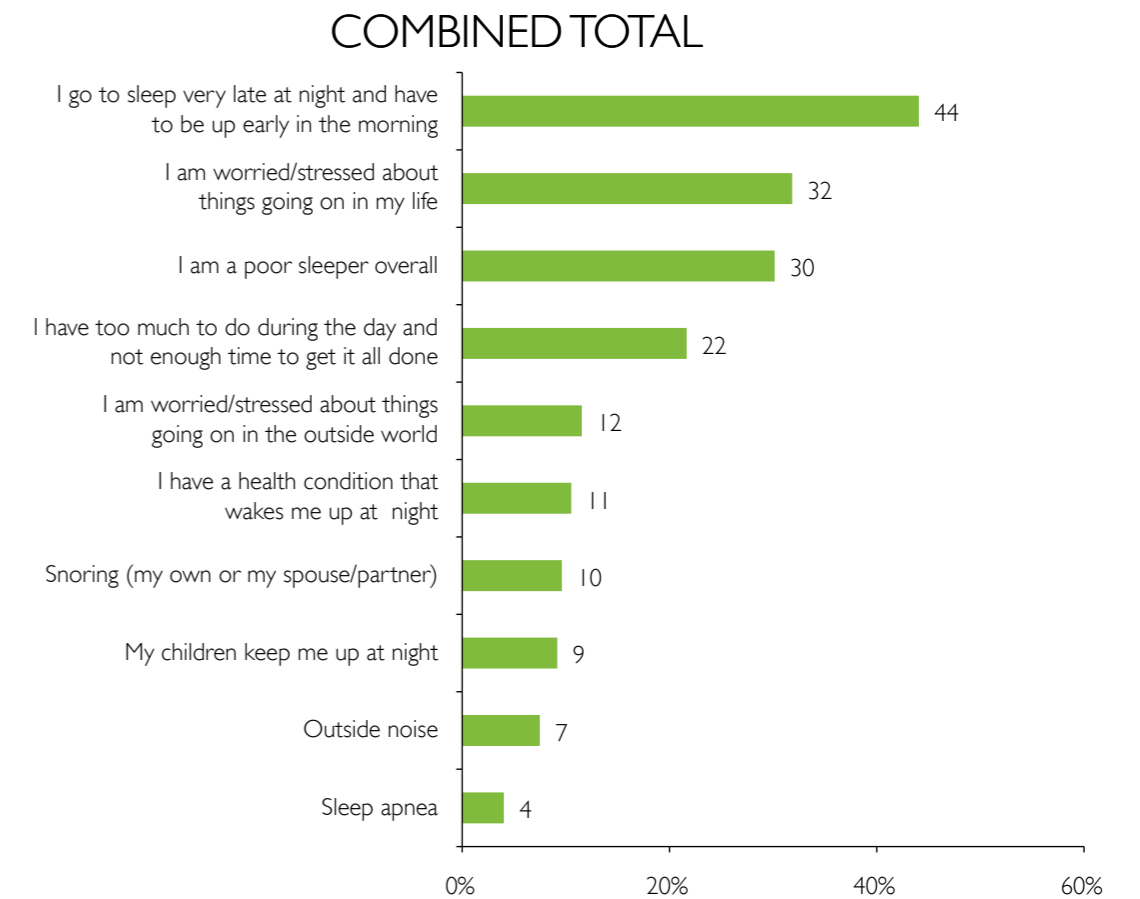


Figure 9: What are some reasons you don't get enough sleep at night? Q25

Reasons for Lack of Sleep²⁹: Market Details

There appears to be a trend in Asia and Asia Pacific. Taiwan, Malaysia, Philippines and Singapore are the most likely to cite late nights and early mornings as the top reason behind sleep deprivation. This may be driven by tougher working conditions, as well as

transportation issues affecting travel to and from work in those markets. Stress and worry is affecting people's sleep in many markets across the globe, most notably in the US, Belgium, Singapore and India.

	Go to sleep late at night, up very early	Poor sleeper	Worried/Stressed about life
COMBINED TOTAL	44%	30%	32%
The Americas			
Brazil	41%	17%	24%
US	36%	38%	49%
Europe			
Belgium	40%	45%	42%
France	37%	36%	39%
Germany	55%	42%	39%
Italy	46%	N/A	41%
Netherlands	44%	34%	30%
Poland	N/A	N/A	N/A
Spain	22%	26%	29%
Turkey	4%	21%	35%
UK	32%	45%	31%
Middle East			
KSA	40%	18%	27%
UAE	36%	13%	27%
Asia			
China	52%	43%	30%
Taiwan	63%	39%	33%
India	47%	33%	54%
Japan	38%	37%	27%
Asia Pacific			
Australia	51%	22%	30%
Indonesia	31%	43%	9%
Korea	40%	27%	26%
Malaysia	56%	13%	8%
Philippines	70%	29%	33%
Singapore	72%	29%	43%

Table 15: What are some reasons you don't get enough sleep at night? Q25

²⁹ N/A indicates that a response category was not part of a country's Philips Index Survey.

Across Markets, People Recognize Sleep Deprivation's Impact on Their Lives

Sleep deprivation is considered to have an impact on many aspects of health and well-being across markets. The majority of people feel that their

physical health is affected by sleep deprivation; however nearly half (48%) believe it also affects their mental health and home life.

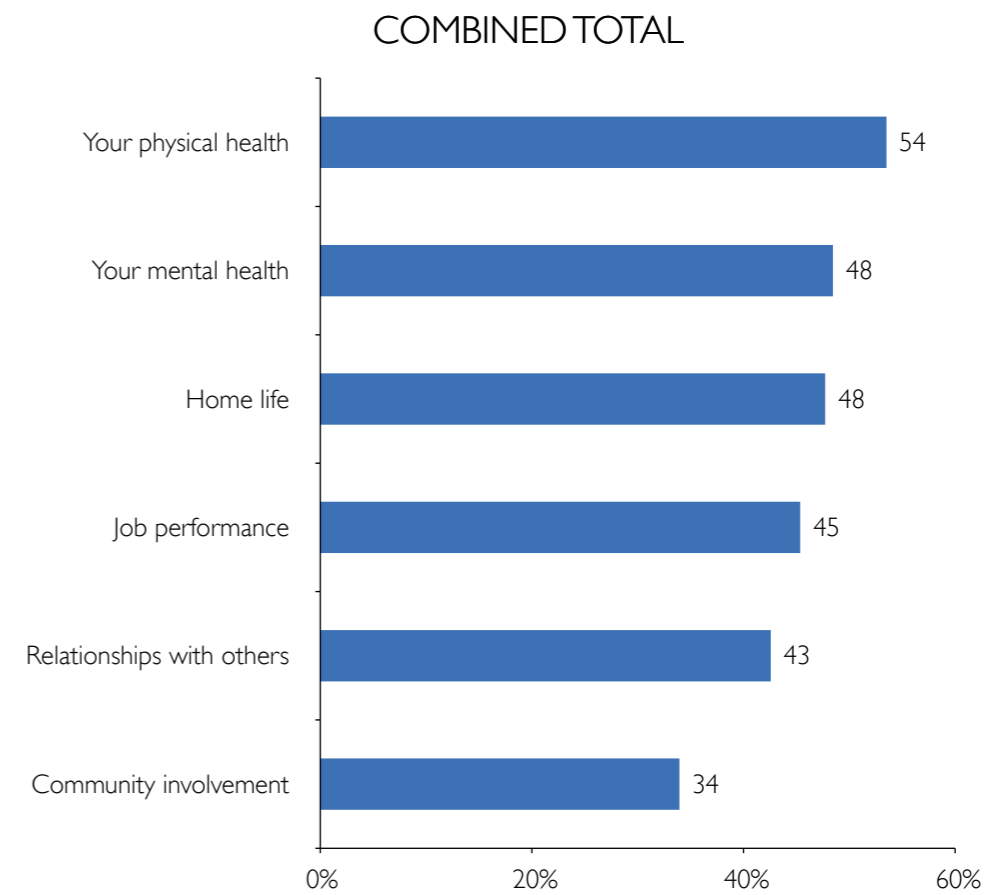


Figure 10: How much does a lack of enough sleep affect each of the following? Q26

Physical and Mental Health Are Most Affected by Lack of Sleep

In general, the French and those living in the Middle East are most likely to say lack of sleep impacts several aspects of their lives. Meanwhile, there is a polarized

opinion across regions as to the impact of lack of sleep on community involvement and relationships with others.

	Your physical health	Your mental health	Home life	Job performance	Relationships with others	Community involvement
COMBINED TOTAL	55%	50%	49%	47%	44%	36%
The Americas						
Brazil	47%	47%	59%	52%	58%	76%
US	57%	48%	46%	43%	41%	34%
Europe						
Belgium						
France	75%	62%	66%	59%	57%	N/A
Germany	33%	30%	20%	22%	30%	6%
Italy	40%	39%	43%	43%	54%	67%
Netherlands	40%	44%	33%	29%	27%	23%
Poland	N/A	N/A	N/A	N/A	N/A	N/A
Spain	58%	51%	45%	44%	35%	13%
Turkey	57%	70%	65%	51%	42%	54%
UK	55%	48%	45%	28%	36%	18%
Middle East						
KSA	73%	59%	73%	65%	63%	55%
UAE	73%	59%	71%	69%	72%	62%
Asia						
China	70%	59%	48%	53%	49%	N/A
Taiwan	73%	67%	58%	69%	53%	25%
India	48%	45%	54%	42%	35%	36%
Japan	53%	60%	52%	53%	33%	11%
Asia Pacific						
Australia	51%	44%	39%	42%	48%	31%
Indonesia	45%	37%	37%	47%	32%	31%
Korea	57%	58%	56%	48%	55%	35%
Malaysia	42%	36%	35%	35%	30%	30%
Philippines	52%	29%	37%	45%	21%	43%
Singapore	64%	57%	58%	53%	57%	27%

Table 16: How much does a lack of enough sleep affect each of the following? Q26

While Stress is a Global Issue, Some Regions Experience it More than Others

Every market is experiencing some level of stress, just to varying degrees. The Americas and Europe tend to have higher levels of stress than those living in the Middle East and some Asian Pacific countries. However, people in

India and Taiwan feel particularly stressed, with two-thirds and three-fourths feeling "a lot" or "somewhat" stressed respectively.

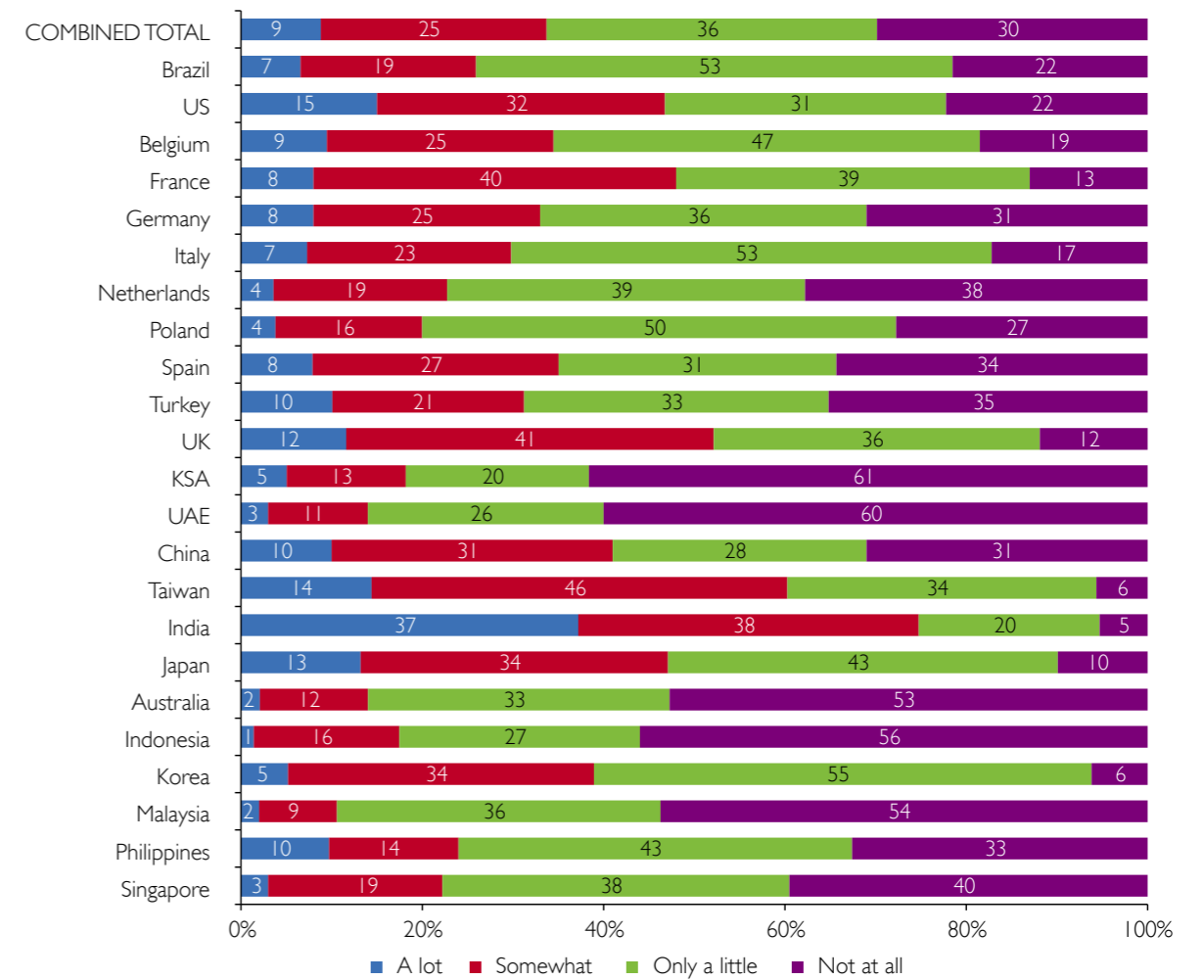


Figure 11: How stressed do you consider yourself to be? Q27

Financial Concerns Are Key Stressors for People Across All Markets

As a true illustration of how interconnected today's world economies have become, financial concerns are the common stressors in people's lives across the globe.

Additionally, given the current economic climate, job related stressors and those related to future financial planning are also very high concerns.

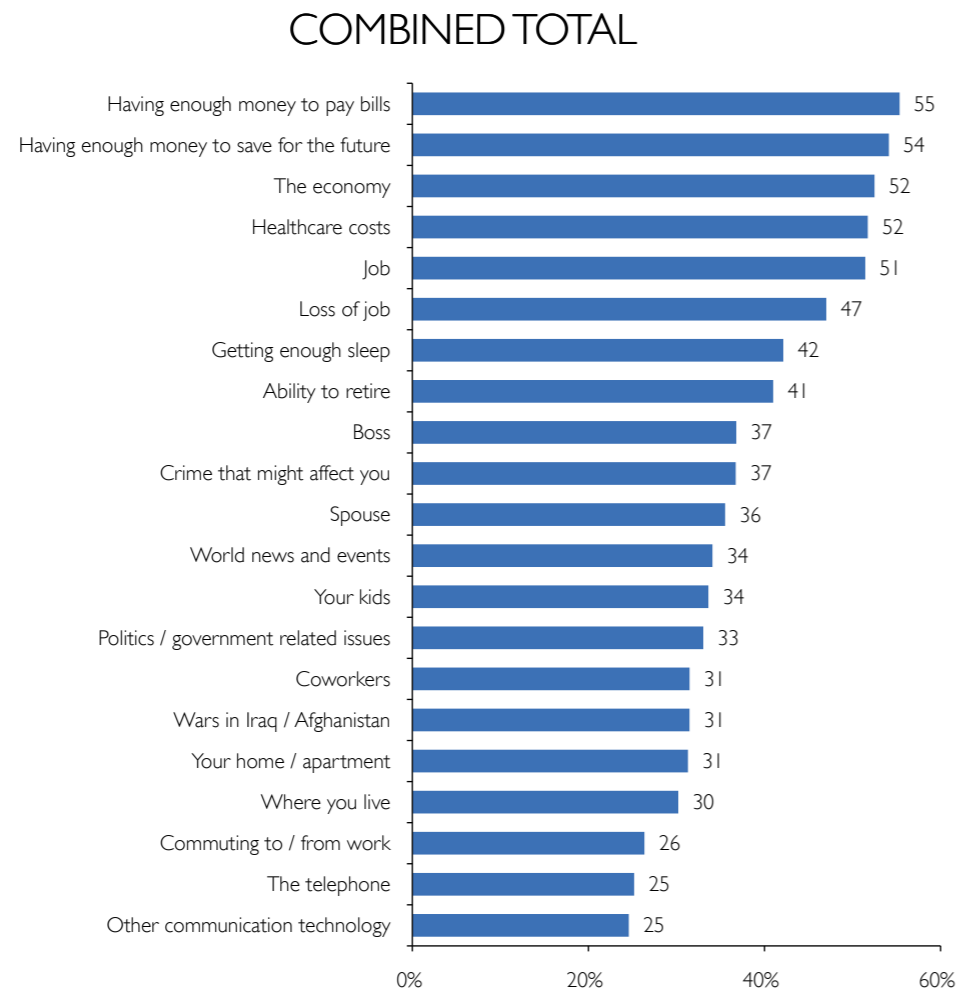


Figure 12: To what degree do each of the following contribute to stress you might feel? A LOT / SOMEWHAT Q28

Financial Concerns are Universal Stressors

Collectively, having enough money to pay bills is a key driver of stress across the majority of markets. This is felt most strongly in the US, UAE and European markets such as Spain, Turkey and the UK. Stress over losing one's

job is felt most strongly in emerging economies such as Brazil, UAE, Indonesia, Singapore and the Philippines, as well as the struggling economy of Spain.

	Having enough money to pay bills	The economy	Healthcare costs	Loss of job	Getting enough sleep	Boss
COMBINED TOTAL	55%	52%	52%	47%	42%	37%
The Americas						
Brazil	48%	36%	58%	57%	66%	48%
US	66%	74%	67%	48%	49%	32%
Europe						
Belgium	23%	25%	30%	26%	31%	28%
France	35%	N/A	35%	50%	59%	61%
Germany	N/A	54%	54%	36%	19%	N/A
Italy	32%	68%	52%	46%	57%	37%
Netherlands	18%	19%	33%	21%	32%	27%
Poland	60%	38%	51%	48%	40%	34%
Spain	77%	74%	41%	76%	63%	40%
Turkey	65%	76%	66%	N/A	39%	31%
UK	67%	54%	N/A	42%	50%	26%
Middle East						
KSA	53%	53%	57%	41%	53%	37%
UAE	66%	70%	70%	61%	53%	61%
Asia						
China	46%	46%	60%	49%	59%	46%
Taiwan	61%	44%	45%	48%	44%	49%
India	52%	54%	54%	20%	34%	24%
Japan	25%	35%	32%	55%	47%	28%
Asia Pacific						
Australia	49%	57%	58%	46%	41%	36%
Indonesia	49%	58%	52%	59%	46%	43%
Korea	60%	58%	51%	38%	48%	39%
Malaysia	35%	46%	45%	49%	37%	36%
Philippines	48%	58%	59%	74%	21%	55%
Singapore	60%	59%	68%	61%	53%	45%

Table 16: To what degree do each of the following contribute to stress you might feel? A LOT / SOMEWHAT Q28

³⁰ N/A indicates that a response category was not part of a country's Philips Index Survey

IV b. How People Take Care of Their Health and Well-being Personal Time is the Global Currency for Improving Health and Well-being

Though people across the globe do practice a variety of methods to improve their health, spending time with friends and family or relaxing are the most popular ways people do to boost their feelings of well-being.

COMBINED TOTAL

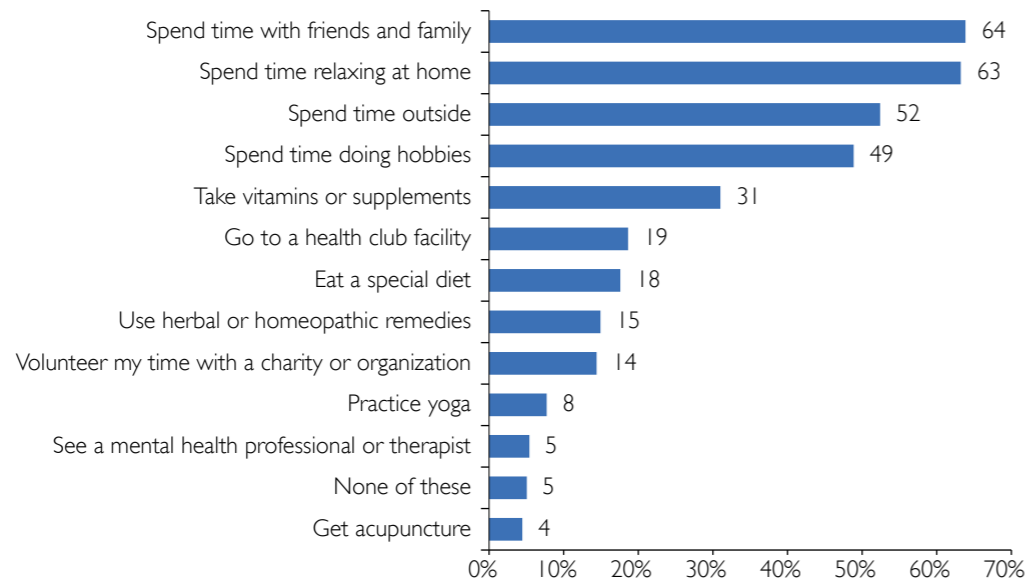


Figure 13: Which of the following do you do to help improve your feeling of well-being? Q6

Spending Time with Friends and Family is the Preferred Way of Improving Health and Well-being

Universally, having time to themselves or with family/friends, are the key ways people improve their sense of well-being. These sentiments are felt most strongly in the Americas and Europe, especially in the US, Germany, Spain and the Netherlands. Surprisingly, in countries with

strong family traditions and connections, less people cite these activities as necessary to improving well-being. This could be driven by the fact that these markets—KSA, UAE, Turkey—have such high levels of satisfaction with their current state of personal relationships.

	Spend time with friends and family	Spend time relaxing at home	Spend time outside	Spend time doing hobbies	Take vitamins or supplements
COMBINED TOTAL	64%	63%	52%	49%	31%
The Americas					
Brazil	68%	73%	N/A	34%	25%
US	87%	84%	79%	69%	56%
Europe					
Belgium	74%	79%	62%	65%	26%
France	64%	60%	46%	51%	14%
Germany	93%	92%	95%	83%	22%
Italy	N/A	61%	47%	49%	34%
Netherlands	64%	84%	64%	62%	27%
Poland	49%	41%	54%	28%	14%
Spain	88%	79%	76%	68%	15%
Turkey	N/A	30%	12%	16%	3%
UK	67%	75%	60%	53%	41%
Middle East					
KSA	51%	43%	33%	31%	14%
UAE	59%	52%	48%	31%	22%
Asia					
China	59%	63%	N/A	46%	29%
Taiwan	58%	N/A	60%	40%	48%
India	70%	69%	53%	30%	31%
Japan	49%	74%	52%	58%	36%
Asia Pacific					
Australia	39%	49%	39%	29%	41%
Indonesia	49%	47%	22%	32%	49%
Korea	28%	26%	17%	32%	24%
Malaysia	68%	68%	60%	52%	51%
Philippines	87%	71%	62%	72%	42%
Singapore	72%	72%	61%	58%	50%

Table 17: Which of the following do you do to help improve your feeling of well-being? Q6

³¹ N/A indicates that a response category was not part of a country's Philips Index Survey

Globally There is a Strong Sense of Personal Responsibility When it Comes to Health

Across markets, very few people believe there is not much they can do about their health. Those in the US, Brazil and UAE in particular are most likely to believe that “for the most part, my health is up to me.”

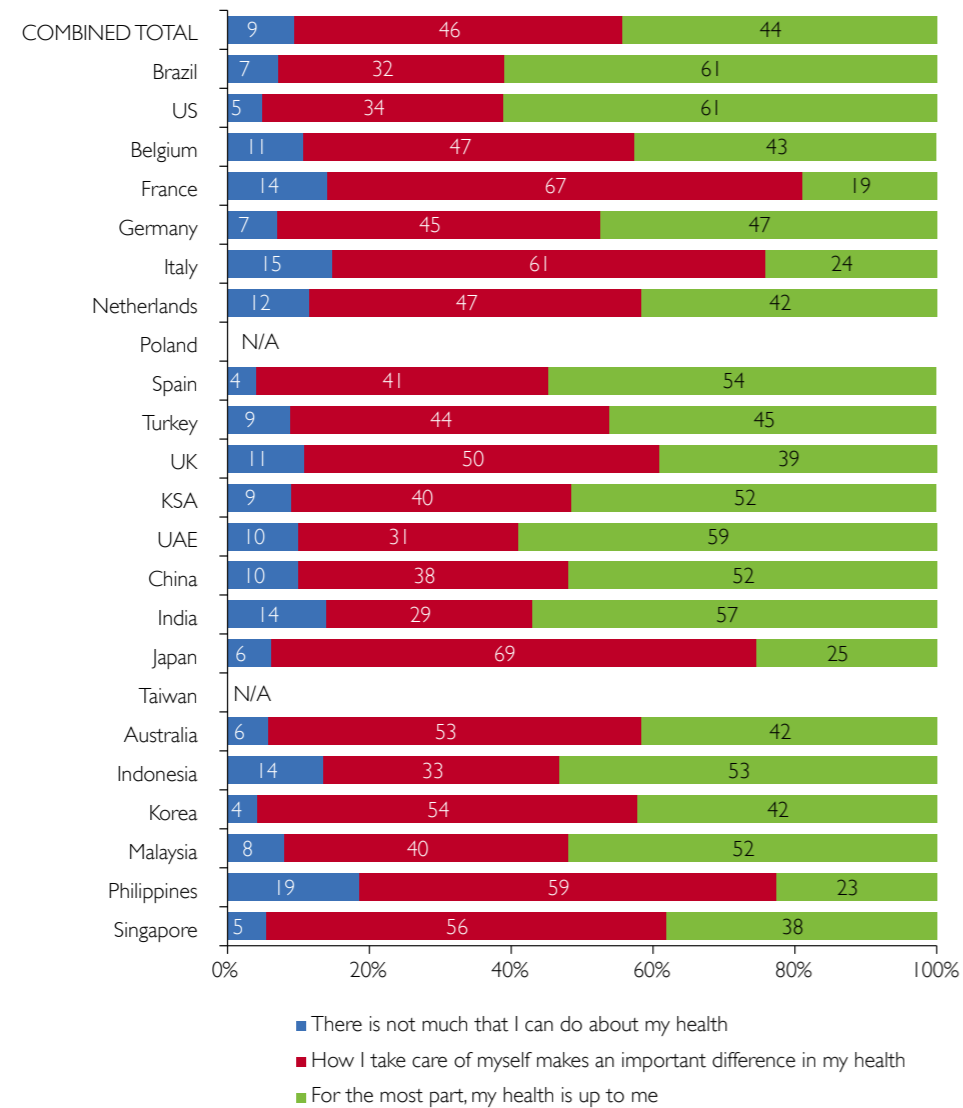


Figure 14: How much do you feel that the state of your health is up to you to control? Q7
³² This question was not asked in Taiwan or Poland

Preventative Health from a Global Standpoint

There are regional differences when it comes to taking preventative health measures. Developed nations are much more likely to see their doctor on a regular basis for a general check-up. China is the key exception; more than half claim to visit the doctor annually for a general check-up. Markets such as India, KSA, UAE, Turkey and Indonesia are most likely not to get regular check-ups. Access and healthcare costs may be playing a role in these markets.

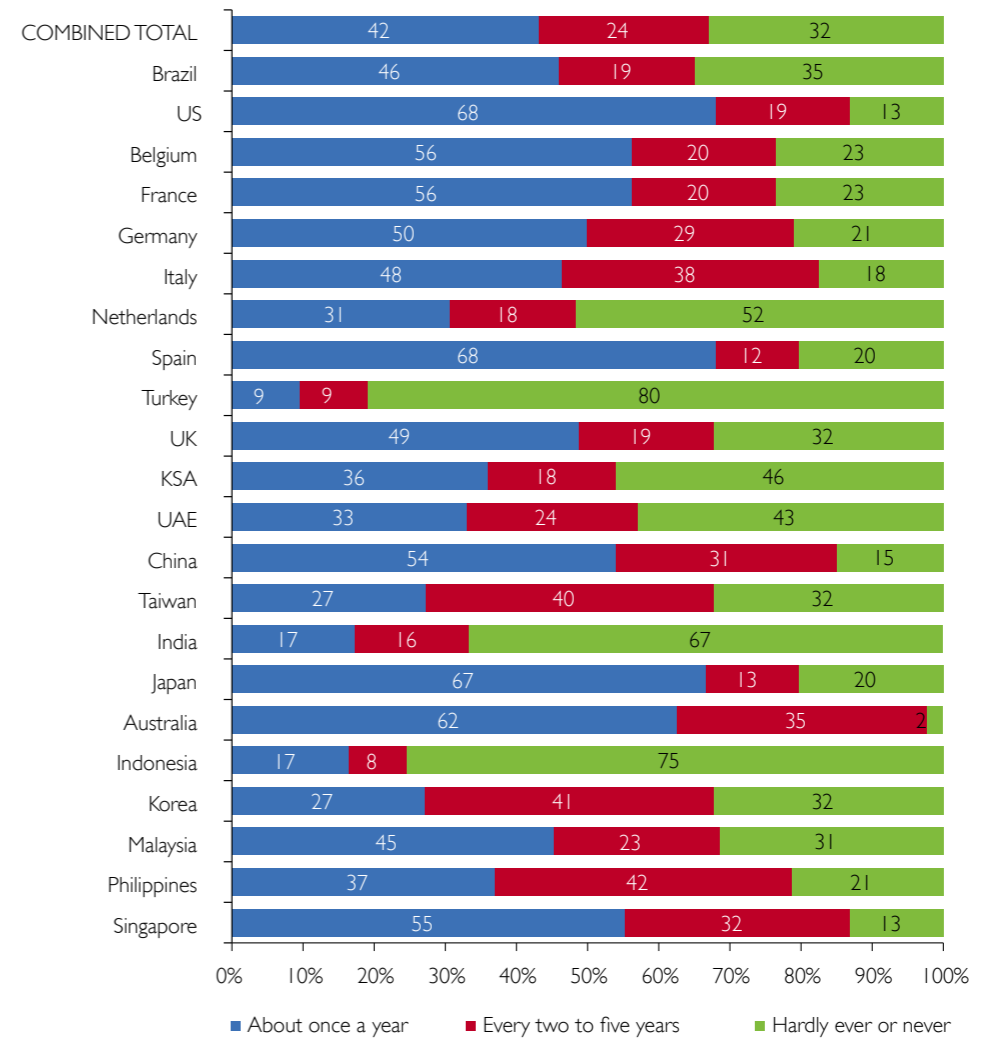


Figure 15: How often do you go to the doctor for a general check-up? Q11
³³ Questions 11, 12, and 13 regarding Preventative Health were not asked in Poland.

Preventative Health from a Global Standpoint

Across markets, people are generally more likely to visit the doctor for a specific health problem or condition than they are for a general check-up. However, citizens in

The Netherlands, India, Japan, Indonesia and France are most likely to say that they hardly ever (or never) visit the doctor for a specific issue.

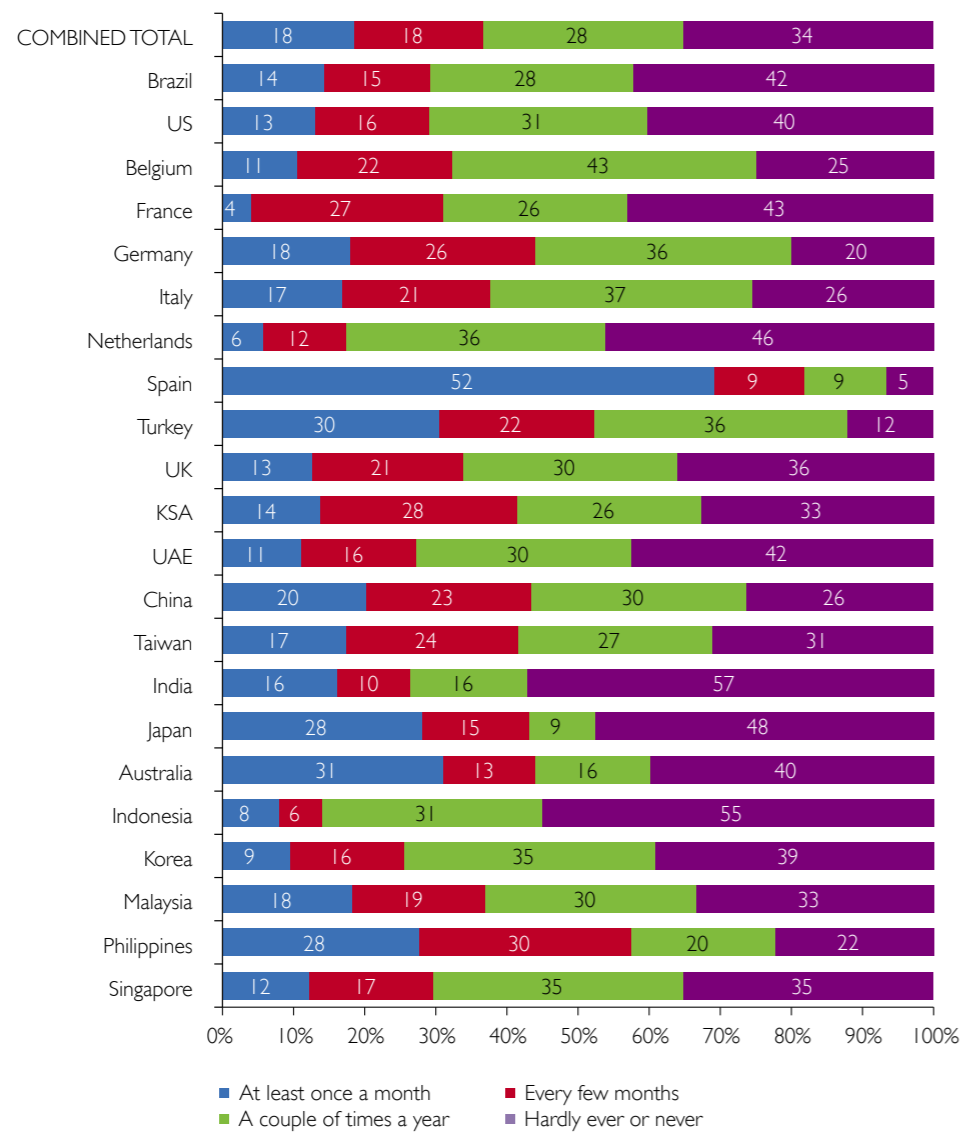


Figure 16: How often do you go to the doctor for a specific problem? Q12

Globally the Frequency of Dentist Visits Vary by Market

Generally speaking, there is a high propensity to visit the dentist for a cleaning or general check-up at least once a year. The key exceptions are Turkey, India, Indonesia and Malaysia; access to dental care could be playing a role in these markets. There appears to be a distinct

difference in frequency of visits those in developed markets compared with those in emerging markets. In the US and Europe people tend to visit the dentist more frequently than those living in the Middle East and some Asian markets.

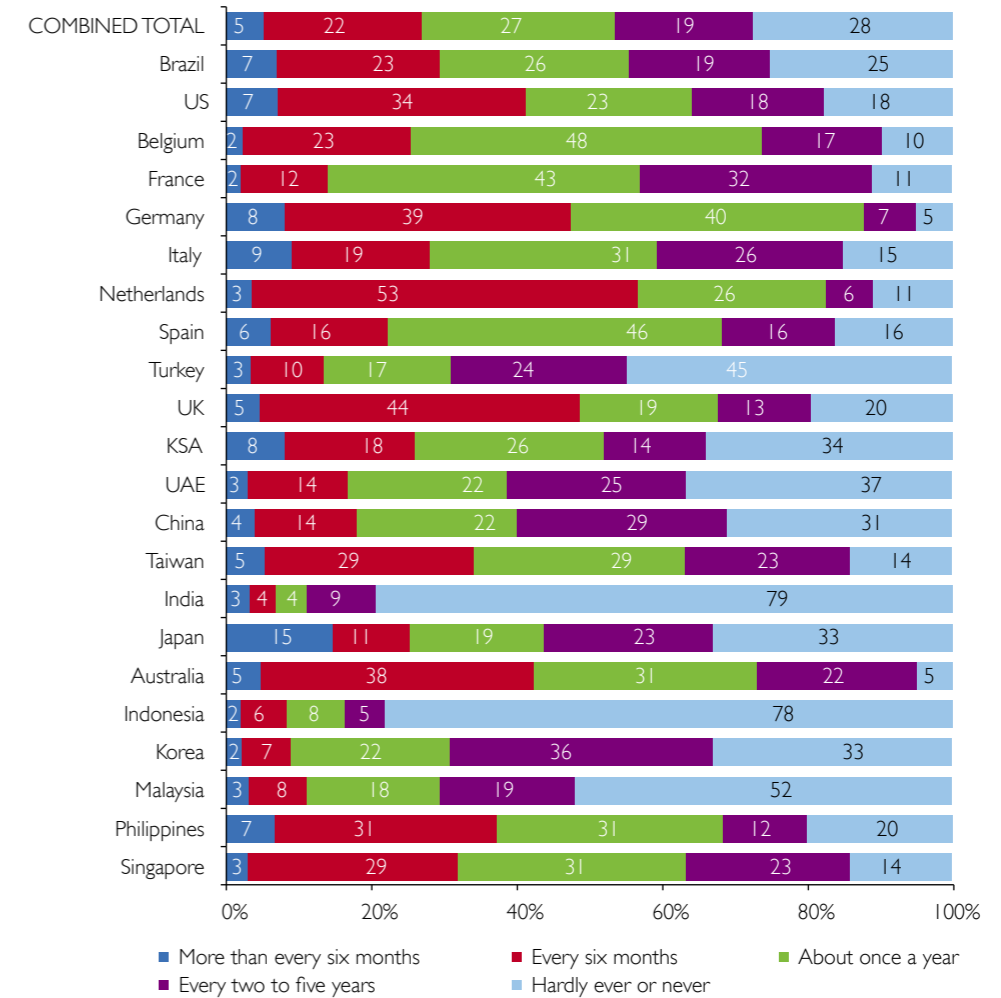


Figure 17: How often do you go to the dentist for a cleaning or a general check-up? Q13

Doctors Sought Out for Health and Medical Information First, Before Any Other Source Across the Globe

Despite the availability of information online, and increased internet access globally, doctors are still the number one go-to sources for medical information.

Family members and/or friends are also seen as a reliable go-to source for health information.

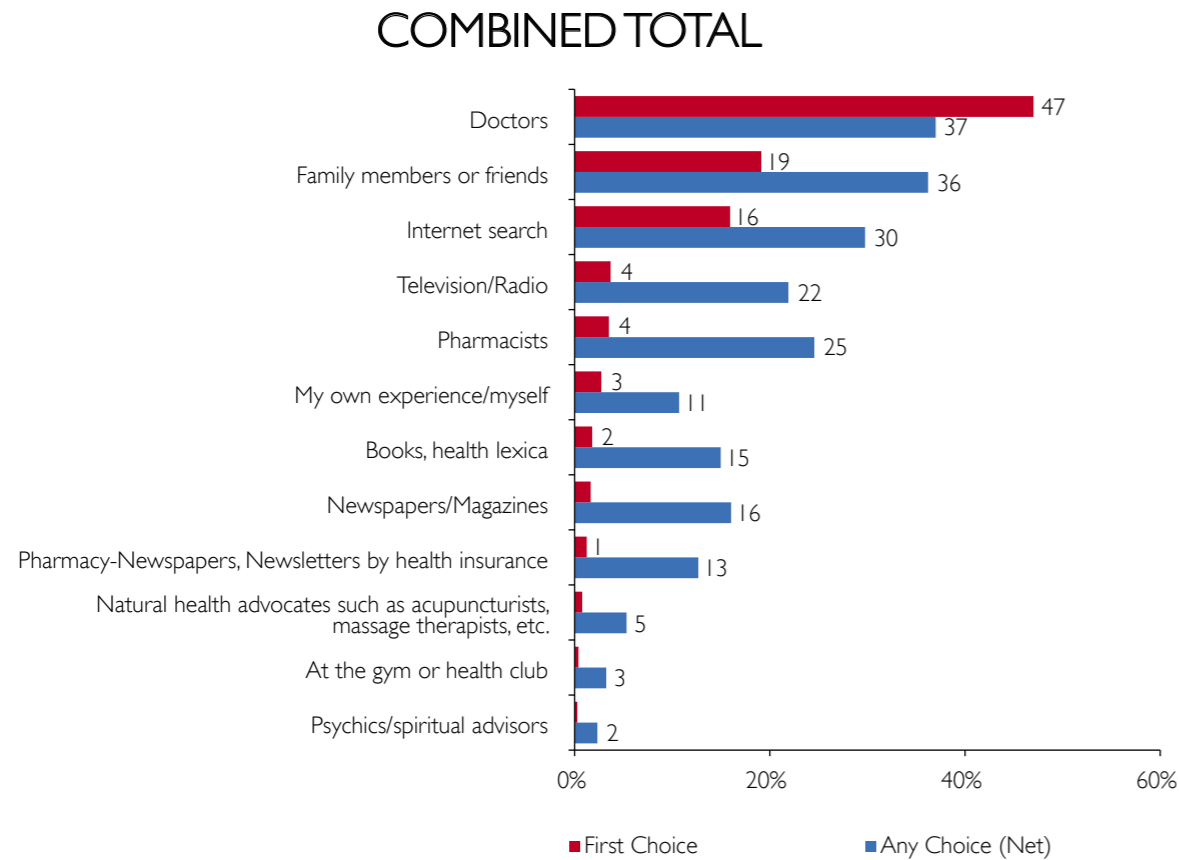


Figure 18: When you are concerned about being sick, where do you usually get your medical or health information FIRST? Where else do you get your medical or health information? Q14/15

³⁴ Question 15, regarding other sources of information was not asked in Poland.

Doctors Are the First Choice for Health Information Globally

Doctors are the clear-cut first choice for health news and information almost universally. The only exceptions are the Japanese, who tend to turn to the internet first, and Indonesians and Malaysians, who turn first to their family and friends. Access and cost of healthcare, as well

as social traditions, may be driving this sentiment in these markets, as well as in India where family is also quickly turned to for health information. The Dutch are just as likely to seek out their doctor as the World Wide Web.

	Doctors	Family members / friends	Internet
COMBINED TOTAL	47%	19%	16%
The Americas			
Brazil	40%	15%	32%
US	53%	12%	18%
Europe			
Belgium	54%	11%	20%
France	56%	7%	11%
Germany	60%	15%	5%
Italy	45%	14%	29%
Netherlands	39%	12%	38%
Poland	56%	23%	3%
Spain	70%	19%	3%
Turkey	51%	22%	7%
UK	53%	8%	26%
Middle East			
KSA	53%	23%	8%
UAE	63%	20%	5%
Asia			
China	43%	12%	19%
Taiwan	45%	23%	21%
India	45%	35%	1%
Japan	22%	21%	48%
Asia Pacific			
Australia	45%	13%	12%
Indonesia	30%	42%	5%
Korea	37%	28%	15%
Malaysia	58%	19%	5%
Philippines	27%	35%	7%
Singapore	43%	15%	14%

Table 19: When you are concerned about being sick, where do you usually get your medical or health information FIRST? Q14

Attitudes to Taking Care of Health: Globally

While there are many contributing factors towards attitudes to health—geographic, social, historical, economical—in general, people across geographies

have a good relationship with their doctor and follow his or her advice.

	COMBINED TOTAL	RANK
Fitness		
I don't exercise as much as I think I should	46%	3
I am as physically fit as I can be for my age	42%	4
I eat healthier than most people	36%	9
I'm in better shape now than ever before	22%	18
Physician Directed Health Management		
I do whatever the Doctor tells me	49%	1
I am comfortable talking to my doctor about medical issues	48%	2
I always go for the medical tests I'm supposed to get	39%	7
I avoid going to the Doctor as much as possible	33%	11
I don't think I go to the Doctor as much as I should	27%	15
I'm nervous/skeptical about going to the hospital	24%	17
I would much prefer to do my own medical tests at home	15%	22
If I don't like what a Doctor says, I ignore it	11%	24
Health and Technology		
I expect medical technology to keep me healthy to a ripe old age	36%	10
I wish I could email my Doctor when I have questions	27%	16
I am eager to try new gadgets or devices aimed at improving my health and well-being	22%	19
I would communicate with my Doctor more often if I didn't have to make a trip	21%	20
Health Engagement		
I like to stay on top of health-related news and information	38%	8
If I don't like what a Doctor says, I go for a second opinion	32%	12
I go to the Doctor regularly	31%	13
Treatment Affinity		
I think that surgery should always be avoided if possible	40%	6
I believe in non-traditional forms of medicine such as acupuncture and herbal treatments	28%	14
I believe most health problems get better if you give them time	27%	14
I don't always take the medicine I'm prescribed	18%	21
Health Alternatives		
I believe you can improve your appearance without cosmetic surgery	40%	5
I wouldn't mind having a little cosmetic surgery to improve my appearance	13%	23

Table 20: Which of the following statements are true about you? Q16

Attitudes to Taking Care of Health: In Detail – Health and Technology

Australian and US citizens are the most optimistic about the benefits of medical technology for life expectancy, and show the most enthusiasm, when it comes to using technology for health management. This enthusiasm is also

shared by their European counterparts Spain, Germany and Turkey, as well as Asia Pacific countries Australia and the Philippines.

	I expect medical technology to keep me healthy to a ripe old age	I am eager to try new gadgets or devices aimed at improving my health and wellbeing	I wish I could email my Doctor when I have questions	I would communicate with my Doctor more often if I didn't have to make a trip
COMBINED TOTAL	36%	22%	27%	21%
The Americas				
Brazil	31%	12%	28%	25%
US	59%	42%	59%	49%
Europe				
Belgium	27%	6%	20%	6%
France	22%	5%	25%	11%
Germany	66%	47%	23%	5%
Italy	21%	5%	30%	14%
Netherlands	17%	8%	22%	2%
Poland	78%	46%	42%	46%
Spain	75%	51%	47%	33%
Turkey	75%	55%	60%	44%
UK	16%	13%	31%	12%
Middle East				
KSA	18%	10%	8%	8%
UAE	17%	10%	10%	8%
Asia				
China	33%	18%	N/A	N/A
Taiwan	33%	6%	8%	16%
India	21%	11%	7%	9%
Japan	13%	5%	27%	4%
Asia Pacific				
Australia	47%	40%	52%	46%
Indonesia	16%	7%	7%	7%
Korea	35%	17%	12%	10%
Malaysia	27%	18%	11%	15%
Philippines	43%	42%	28%	49%
Singapore	44%	29%	39%	34%

Table 21: Which of the following statements are true about you? Q16

V. Independent Living: Aging and Health and Well-being

Attitudes to Taking Care of Health: In Detail – Fitness

Developed nations are most likely to believe they are as physically fit as they can be for their age. This sentiment is also held by countries in Asia Pacific such as Indonesia, Philippines and Singapore. However, on the whole, European citizens are much less likely to believe they are in better shape now than ever before.

	I am as physically fit as I can be for my age	I am in better shape now than ever before
COMBINED TOTAL	42%	22%
The Americas		
Brazil	24%	11%
US	51%	29%
Europe		
Belgium	34%	6%
France	21%	4%
Germany	84%	21%
Italy	26%	5%
Netherlands	31%	5%
Poland	68%	36%
Spain	69%	21%
Turkey	86%	70%
UK	22%	5%
Middle East		
KSA	25%	17%
UAE	34%	19%
Asia		
China	21%	35%
Taiwan	16%	6%
India	44%	32%
Japan	38%	2%
Asia Pacific		
Australia	53%	45%
Indonesia	45%	22%
Korea	21%	22%
Malaysia	31%	21%
Philippines	72%	37%
Singapore	51%	43%

Table 22: Which of the following statements are true about you? Q16

V a. General Attitudes to Aging and Health and Well-being

Life Expectancy – People are Optimistic About Living Long into the Future Across Markets

Generally speaking, most people across geographies believe they are going to live for longer, or for about the same lifespan as their parents. While few markets believe they are going to live a shorter life than their parents, the least optimistic markets are Italy, Japan and Korea. Most people believe they are going to live until at least 70 years of age.

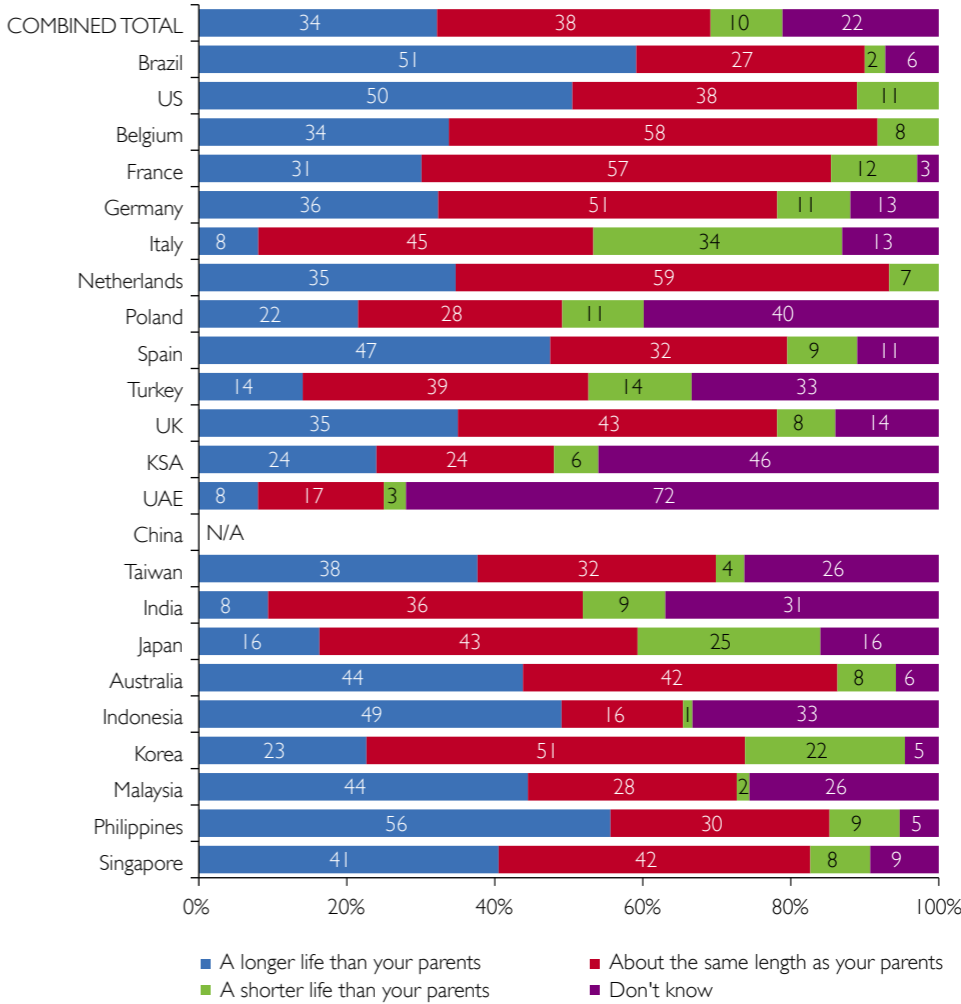


Figure 19: Do you expect to live...? Q18

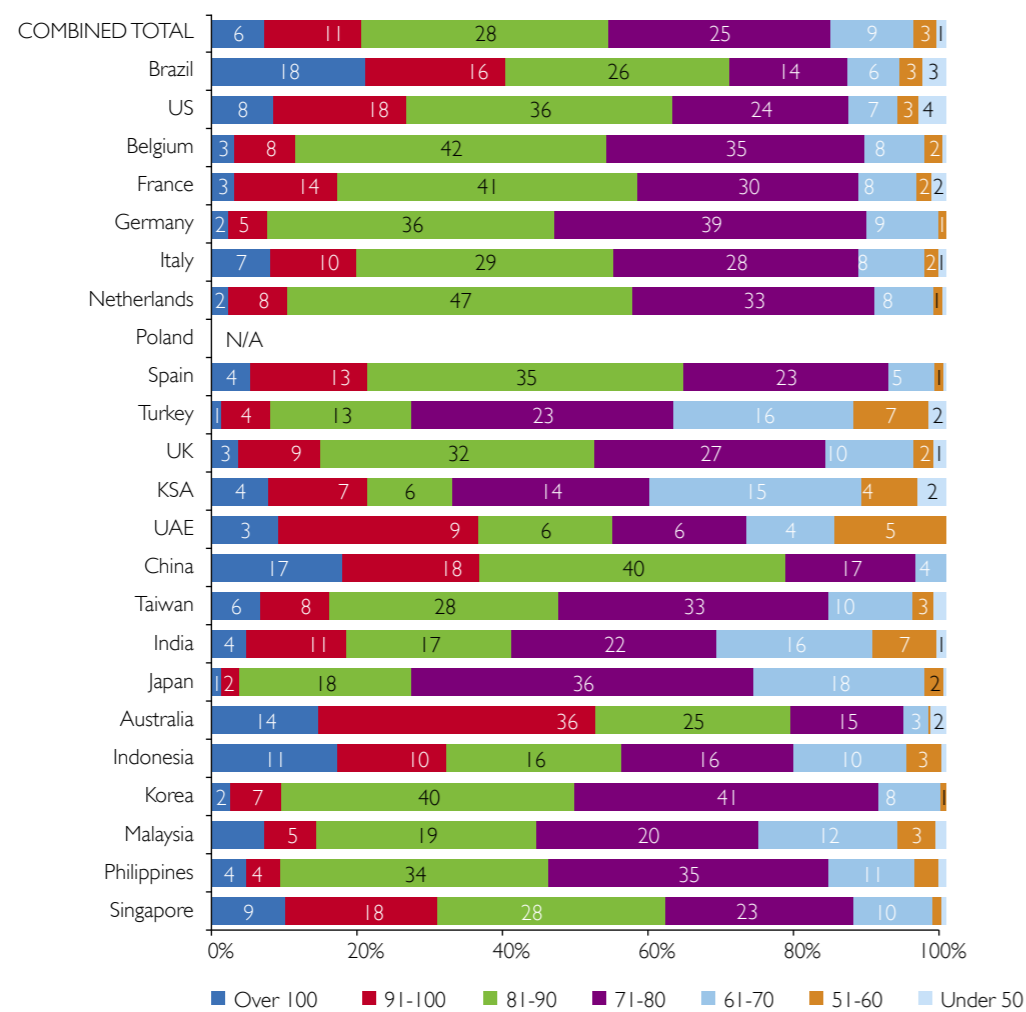


Figure 20: How old do you expect to be? Q17
³⁵ This question was not asked in China
³⁶ This question was not asked in Poland

Potential Threats to Health

General ailments associated with aging and potentially losing independence, such as declining vision and hearing, joint pain/arthritis, high cholesterol and memory loss, are more worrisome than more specific afflictions (cancer, depression, AIDS).

	COMBINED TOTAL
Declining vision	30%
Joint pain/Arthritis	28%
Being overweight/obesity	24%
High cholesterol	23%
Memory loss	20%
High sugar count/diabetes	18%
Anxiety	17%
Declining hearing	16%
Cancer	16%
Depression	16%
Heart attack	15%
Widespread influenza (Flu)	15%
Stroke	12%
Viral infections (general)	12%
Bacterial infections (general)	11%
AIDS	4%

Table 24: Which of the following are you concerned about as potential threats to your health in the next five years? SELECT ALL THAT APPLY Q9

³⁷ This question was not asked in Germany or Poland

V b. Older Citizens' Attitudes to Health and Well-being Aging Index

The Aging Index is an examination of citizens 65 and older, and gives us a sense of how well they are doing relative to the general population within each market (specific to that country's total Index score, which is a weighted satisfaction score of

the components of health and well-being). That calculation reveals that our world's older citizens are feeling better in Belgium, Japan and the Philippines, and having a tougher time in France, Germany, Turkey, Australia, Korea and Singapore.

Aging Index	
COMBINED TOTAL	94
Brazil	99
US	99
Belgium	104
France	87
Germany	93
Italy	N/A
Netherlands	98
Poland	81
Spain	100
Turkey	77
UK	98
KSA	N/A
UAE	N/A
China	102
Taiwan	N/A
India	N/A
Japan	106
Australia	86
Indonesia	94
Korea	79
Malaysia	93
Philippines	119
Singapore	82

Table 23

³⁸ Aging Index is calculated among people 65 and over and is representative of those respondents total Index score relative to the total Index score of all respondents in that market. For markets in which data was not collected for people 65 and older an Aging Index figure was not calculated.

General State of Health and Well-being

Unsurprisingly, older citizens in most markets rate their current state of health and well-being as being less than that of the population as a whole. In a few exceptions—

such as the US, Belgium, France and Singapore—the health and well-being of the older population is consistent with the nations as a whole.

General State of Health and Well-being		
	TOTAL MARKET	65+
COMBINED TOTAL	61%	48%
The Americas		
Brazil	71%	39%
US	74%	75%
Europe		
Belgium	70%	71%
France	68%	69%
Germany	65%	55%
Italy	67%	N/A
Netherlands	67%	59%
Poland	67%	30%
Spain	70%	55%
Turkey	66%	40%
UK	38%	40%
Middle East		
KSA	83%	N/A
UAE	84%	N/A
Asia		
China	34%	34%
Taiwan	23%	N/A
India	75%	N/A
Japan	38%	35%
Asia Pacific		
Australia	58%	21%
Indonesia	56%	45%
Korea	52%	51%
Malaysia	61%	50%
Philippines	53%	33%
Singapore	72%	68%

Table 25: How would you rate your overall feeling of health and well-being? Q1 (Very good/Good)

Responsibility for Health

When we examine markets as a combined whole, there is little difference between the total market versus nations' older citizens in regard to feelings of personal control of their health. The exceptions appear to be elder

citizens in Brazil and China, who are more likely than the general populations in their respective markets to believe their health is entirely in their own hands.

Feel Personal Responsibility for Health		
	TOTAL MARKET	65+
COMBINED TOTAL	43%	42%
The Americas		
Brazil	61%	73%
US	60%	55%
Europe		
Belgium	43%	35%
France	19%	17%
Germany	47%	54%
Italy	24%	N/A
Netherlands	42%	41%
Poland	N/A	N/A
Spain	54%	54%
Turkey	45%	30%
UK	39%	36%
Middle East		
KSA	52%	N/A
UAE	59%	N/A
Asia		
China	52%	72%
Taiwan	N/A	N/A
India	57%	N/A
Japan	25%	35%
Asia Pacific		
Australia	42%	46%
Indonesia	53%	52%
Korea	42%	24%
Malaysia	52%	43%
Philippines	23%	28%
Singapore	38%	41%

Table 26: How much do you feel that the state of your health is up to you to control? Q7 (For the most part my health is up to me)
³⁹ This question was not asked in Poland

Not all Seniors Believe They are Getting Enough Sleep

On the whole, seniors in each market tend to feel like they are getting enough sleep. However, when examined at the Combined Total level, one in four are feeling sleep deprived. This is especially true in Korea

and the Philippines, where seniors are more likely to say they aren't getting enough sleep compared to the total population in those markets.

GETTING ENOUGH SLEEP AT NIGHT: YES		
	TOTAL MARKET	65+
COMBINED TOTAL	69%	74%
The Americas		
Brazil	60%	78%
US	63%	80%
Europe		
Belgium	54%	65%
France	51%	65%
Germany	65%	77%
Italy	62%	N/A
Netherlands	63%	59%
Poland	N/A	N/A
Spain	75%	81%
Turkey	85%	90%
UK	N/A	N/A
Middle East		
KSA	78%	N/A
UAE	88%	N/A
Asia		
China	63%	76%
Taiwan	44%	N/A
India	86%	N/A
Japan	57%	68%
Asia Pacific		
Australia	77%	75%
Indonesia	79%	77%
Korea	69%	58%
Malaysia	81%	84%
Philippines	69%	60%
Singapore	74%	82%

Table 27: Do you get enough sleep each night (Q24) (Yes/Get Enough Sleep)
³⁹ This question was not asked in Poland.
⁴⁰ This question was not asked in UK and Poland.

Attitudes Towards Health and Technology

Compared to their counterparts across the globe, seniors in the US are most optimistic and enthusiastic about the role technology current plays, or will play, in their health management, in particular how technology

will keep them health as they age. Those living in Asia Pacific countries, with the exception of Australia, are the least optimistic.

	I expect medical technology to keep me healthy to a ripe old age (65+)	I wish I could email my Doctor when I have questions (65+)	I am eager to try new gadgets or devices aimed at improving my health and well-being (65+)	I would communicate with my Doctor more often if I didn't have to make a trip (65+)
COMBINED TOTAL	47%	21%	22%	21%
The Americas				
Brazil	81%	16%	29%	34%
US	77%	35%	38%	26%
Europe				
Belgium	43%	17%	3%	4%
France	27%	22%	2%	7%
Germany	69%	8%	56%	4%
Italy	N/A	N/A	N/A	N/A
Netherlands	24%	10%	3%	1%
Poland	70%	21%	35%	51%
Spain	84%	33%	40%	35%
Turkey	65%	28%	46%	37%
UK	26%	22%	11%	7%
Middle East				
KSA	N/A	N/A	N/A	N/A
UAE	N/A	N/A	N/A	N/A
Asia				
China	41%	N/A	15%	N/A
Taiwan	N/A	N/A	N/A	N/A
India	N/A	N/A	N/A	N/A
Japan	24%	25%	8%	4%
Asia Pacific				
Australia	37%	57%	31%	38%
Indonesia	12%	1%	1%	4%
Korea	37%	6%	11%	21%
Malaysia	24%	3%	19%	14%
Philippines	58%	25%	32%	35%
Singapore	50%	34%	11%	31%

Table 28: Which of the following statements are true about you? Q16

Fitness Attitudes

Seniors feel most physically fit in Brazil, Turkey, the Philippines, and Singapore, while older citizens appear to be having a harder time with their physical health in

France, Korea and Malaysia. When it comes to doing medical test at home, those living in Brazil are the most enthusiastic about the idea.

	I am as physically fit as I can be for my age (65+)	I am in better shape now than ever before (65+)	I would much prefer to do my own medical tests at home (65+)
COMBINED TOTAL	55%	23%	17%
The Americas			
Brazil	75%	46%	51%
US	75%	22%	17%
Europe			
Belgium	53%	6%	3%
France	34%	2%	3%
Germany	88%	23%	25%
Italy	N/A	N/A	N/A
Netherlands	49%	4%	1%
Poland	54%	18%	47%
Spain	82%	25%	25%
Turkey	74%	46%	27%
UK	41%	3%	4%
Middle East			
KSA	N/A	N/A	N/A
UAE	N/A	N/A	N/A
Asia			
China	30%	N/A	12%
Taiwan	N/A	N/A	N/A
India	N/A	N/A	N/A
Japan	65%	2%	16%
Asia Pacific			
Australia	50%	38%	12%
Indonesia	44%	17%	8%
Korea	15%	21%	11%
Malaysia	34%	14%	11%
Philippines	62%	45%	15%
Singapore	59%	51%	13%

Table 29: Which of the following statements are true about you? Q16

VI. Communities: Impact of Communities on Health and Well-being

Aging and Community

Overall, as people age they tend to be in step with the general population when it comes to the importance that access to healthcare, safety and crime play in their

ideal community. However, availability of employment is consistently less of an important factor, aside from emerging economies such as Brazil and in Asia Pacific.

From a community perspective, those living in the Middle East and Asia are generally most satisfied with the community they live and how much they

contribute to it. This sentiment is mixed among more developed nations in Europe.

	Safety and Crime		Access to Healthcare		Availability of Employment	
	TOTAL MARKET	65+	TOTAL MARKET	65+	TOTAL MARKET	65+
COMBINED TOTAL	81%	83%	86%	77%	77%	53%
The Americas						
Brazil	92%	97%	93%	88%	89%	65%
US	89%	91%	94%	69%	80%	44%
Europe						
Belgium	72%	84%	87%	74%	60%	38%
France	N/A	N/A	N/A	N/A	N/A	N/A
Germany	N/A	N/A	N/A	N/A	65%	26%
Italy	N/A	N/A	N/A	N/A	N/A	N/A
Netherlands	79%	92%	89%	83%	61%	22%
Poland	90%	92%	92%	94%	77%	51%
Spain	88%	84%	88%	92%	84%	73%
Turkey	N/A	N/A	N/A	N/A	N/A	N/A
UK	41%	32%	41%	31%	41%	28%
Middle East						
KSA	91%	N/A	93%	N/A	90%	N/A
UAE	97%	N/A	98%	N/A	98%	N/A
Asia						
China	80%	84%	82%	81%	N/A	N/A
Taiwan	N/A	N/A	N/A	N/A	N/A	N/A
India	89%	N/A	87%	N/A	91%	N/A
Japan	63%	77%	82%	76%	62%	39%
Asia Pacific						
Australia	81%	78%	80%	75%	74%	59%
Indonesia	88%	82%	87%	85%	78%	67%
Korea	64%	96%	74%	64%	73%	76%
Malaysia	91%	91%	95%	90%	90%	80%
Philippines	78%	90%	91%	80%	85%	78%
Singapore	85%	82%	91%	78%	82%	47%

Table 30: When you think of the community you would most like to live in, how important are each of the following?
VERY IMPORTANT IMPORTANT Q29

⁴⁰ This question was not asked in France, Italy, Turkey, and Taiwan. Some of the response options were omitted in Germany, Singapore, the Netherlands, and Belgium.

	Community Index								
	Overall	Men	Women	18-24 yrs	25-34 yrs	35-44 yrs	45-54 yrs	55-64 yrs	65+ yrs
COMBINED TOTAL	51%	51%	51%	50%	50%	52%	52%	54%	50%
The Americas									
Brazil	45%	49%	42%	42%	46%	47%	44%	37%	54%
US	50%	51%	50%	44%	48%	49%	51%	55%	57%
Europe									
Belgium	47%	46%	49%	46%	44%	45%	48%	46%	52%
France	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Germany	56%	56%	55%	58%	48%	60%	50%	54%	62%
Italy	23%	21%	25%	20%	21%	27%	22%	23%	N/A
Netherlands	58%	55%	60%	55%	52%	54%	55%	63%	65%
Poland	64%	65%	64%	67%	70%	65%	66%	61%	56%
Spain	36%	35%	38%	32%	34%	34%	38%	42%	39%
Turkey	29%	25%	33%	35%	27%	30%	29%	33%	15%
UK	35%	37%	34%	34%	35%	33%	33%	35%	40%
Middle East									
KSA	80%	82%	79%	82%	80%	82%	80%	71%	N/A
UAE	88%	88%	87%	88%	89%	85%	89%	87%	N/A
Asia									
China	53%	54%	53%	37%	56%	49%	55%	55%	62%
Taiwan	45%	44%	46%	42%	39%	36%	51%	60%	N/A
India	78%	79%	77%	76%	77%	79%	80%		N/A
Japan	19%	16%	22%	20%	17%	18%	18%	18%	25%
Asia Pacific									
Australia	58%	59%	58%	59%	61%	61%	58%	55%	56%
Indonesia	54%	52%	56%	54%	58%	57%	50%	45%	52%
Korea	60%	60%	59%	64%	61%	58%	58%	57%	52%
Malaysia	72%	73%	71%	71%	74%	73%	69%	69%	71%
Philippines	38%	33%	43%	41%	33%	26%	36%	67%	55%
Singapore	64%	66%	63%	55%	62%	66%	69%	69%	61%

Table 31:

⁴² N/A indicates that a response category was not part of a country's Philips Index Survey

⁴³ Responses related to community wer not included in the French Philips Index Survey

⁴⁴ Index is representative of 55—70 years-old

Community Drivers to Health and Well-being across Markets

There is consistency across markets as it relates to the role that community, and how much one contributes to their community, plays in health and well-being. Generally speaking, people rank the community they live in, rather than their contributions, as more important. Italy and Turkey

are least likely to believe either component is relatively important for impacting their own health and well-being. Additionally, the European markets, on a whole, are least likely to consider that how much one contributes to one's own community affects health and well-being.

The Community you live in		How much you contribute to your community		
	Importance to H&WB	RANK	Importance to H&WB	RANK
COMBINED TOTAL	78%		71%	
The Americas				
Brazil	77%	15	65%	11
US	87%	11	81%	6
Europe				
Belgium	92%	6	37%	18
France	N/A	N/A	N/A	N/A
Germany	97%	2	63%	12
Italy	51%	20	28%	20
Netherlands	95%	3	56%	13
Poland	91%	7	84%	5
Spain	74%	15	51%	15
Turkey	35%	21	29%	19
UK	77%	14	45%	16
Middle East				
KSA	94%	4	87%	2
UAE	97%	1	94%	1
Asia				
China	73%	17	N/A	N/A
Taiwan	83%	13	39%	17
India	92%	5	87%	2
Japan	63%	19	25%	21
Asia Pacific				
Australia	77%	16	72%	10
Indonesia	88%	10	86%	4
Korea	90%	9	75%	9
Malaysia	85%	12	77%	8
Philippines	65%	18	53%	14
Singapore	91%	8	80%	7

Table 32: For each of the following, how satisfied are you with this aspect of your life? Q4

⁴³ Responses related to community were not included in the French Philips Index Survey

⁴⁴ Index is representative of 55—70 year-olds

Globally Convenience and Safety are valued in Communities

The most important factors of community include safety (local hospitals, safety and crime rate), convenience (availability of employment, quality of roads, access to

healthcare facilities,) and quality of local services (garbage pick-up, local schools).

	COMBINED TOTAL	Men	Women
Safety and crime rate	86%	84%	87%
Local hospitals	79%	76%	81%
Availability of shopping and grocery stores	78%	76%	81%
Access to healthcare facilities	81%	79%	83%
Pollution and smog	78%	76%	80%
Quality of roads	77%	76%	78%
Availability of employment	77%	77%	78%
Local schools	74%	73%	75%
Garbage pick-up	74%	72%	76%
Parks and recreation facilities	73%	71%	75%
Local government	67%	66%	69%
Distance to your place of employment	66%	66%	67%
Access to arts and culture	62%	59%	64%
Cable service	58%	56%	58%

Table 33: When you think of the community you would most like to live in, how important are each of the following? VERY IMPORTANT/IMPORTANT Q29

⁴⁵ This question was not asked in France, Italy, Turkey, and Taiwan. Some of the response options were omitted in Germany, Singapore, the Netherlands, and Belgium.

VII. A City Perspective

Community Priorities are Consistent across the Globe

The safety and crime rate of a community is clearly the most important factor people consider when they think of their ideal community. On the whole, European

markets tend to place less importance on public facilities, such as schools and healthcare, compared to their counterparts in other regions.

	Safety and Crime	Local hospitals	Pollution and smog	Access to Healthcare	Availability of Employment	Local Schools
COMBINED TOTAL	86%	79%	78%	81%	77%	74%
The Americas						
Brazil	93%	89%	87%	92%	89%	89%
US	94%	90%	86%	89%	80%	78%
Europe						
Belgium	87%	42%	76%	72%	60%	43%
France	N/A	N/A	N/A	N/A	N/A	N/A
Germany	N/A	71%	N/A	N/A	65%	N/A
Italy	N/A	N/A	N/A	N/A	N/A	N/A
Netherlands	89%	59%	74%	79%	61%	47%
Poland	90%	82%	79%	92%	77%	72%
Spain	88%	85%	82%	88%	84%	79%
Turkey	N/A	N/A	N/A	N/A	N/A	N/A
UK	41%	39%	40%	41%	41%	30%
Middle East						
KSA	93%	95%	86%	91%	90%	96%
UAE	98%	97%	92%	97%	98%	92%
Asia						
China	82%	80%	86%	80%	N/A	70%
Taiwan	N/A	N/A	n/a	N/A	N/A	N/A
India	87%	95%	78%	89%	91%	94%
Japan	82%	86%	74%	63%	62%	51%
Asia Pacific						
Australia	80%	79%	68%	81%	74%	75%
Indonesia	87%	90%	84%	88%	78%	90%
Korea	74%	72%	61%	64%	73%	67%
Malaysia	95%	93%	84%	91%	90%	93%
Philippines	91%	56%	84%	78%	85%	85%
Singapore	91%	87%	78%	85%	82%	75%

Table 34: When you think of the community you would most like to live in, how important are each of the following?
VERY IMPORTANT / SOMEWHAT IMPORTANT Q29
⁴⁶ N/A indicates that a response category was not part of a country's Philips Index Survey

VII a. Healthy Lifestyle

Drivers of a Healthy Lifestyle

Overall, physical and mental health are the most important aspects of health and well-being in cities. However, in many cities there is a significant difference, however, between the importance of the community one lives in compared to the amount one contributes to his or her community. This difference is particularly

significant in London, Amsterdam, and Tokyo. Level of stress is also consistently ranked an important factor of one's health and well-being in cities. Interestingly, elements of one's job and salary are significantly less important in Delhi than in other cities.

	Physical health	Mental health	Weight	Stress	Community you live in	Contribute to community	Cost of living	How much you earn	Job	Relationship with boss / coworkers
IMPORTANCE TO YOUR HEALTH AND WELL-BEING										
New York	94%	91%	82%	80%	83%	81%	88%	79%	70%	70%
London	94%	92%	85%	90%	78%	51%	85%	71%	67%	61%
Amsterdam*	100%	100%	86%	85%	98%	52%	76%	86%	76%	62%
Abu Dhabi	99%	99%	96%	94%	93%	87%	98%	94%	94%	97%
Delhi	93%	96%	92%	84%	96%	92%	93%	48%	54%	49%
Beijing	91%	91%	66%	82%	74%	N/A	83%	79%	71%	75%
Tokyo	96%	98%	77%	93%	68%	24%	92%	88%	78%	69%
Jakarta	99%	99%	88%	77%	89%	89%	94%	86%	87%	67%

Table 35: How important are each of the following to your overall health and well-being? (*Amsterdam= small sample size) Q3

Impact of Health and Well-being on Key Components of Life

In cities across the globe, people are most satisfied with their mental health and their communities. Citizens from key economic centers of London, New York and Tokyo, are the least satisfied with their job and the cost of living,

whereas in cities from emerging markets, such as Delhi, Beijing, and Tokyo, people are more dissatisfied with how much they earn.

	Physical health	Mental health	Weight	Stress	Community you live in	Contribute to community	Cost of living	How much you earn	Job	Relationship with boss / coworkers
SATISFACTION RELATIVE TO HEALTH AND WELL-BEING										
New York	75%	87%	63%	50%	73%	54%	28%	42%	39%	62%
London	51%	69%	41%	53%	59%	55%	30%	35%	44%	47%
Amsterdam	64%	79%	43%	58%	77%	74%	53%	68%	73%	76%
Abu Dhabi	98%	100%	95%	92%	95%	94%	80%	91%	95%	98%
Delhi	93%	93%	92%	84%	99%	96%	92%	44%	79%	50%
Beijing	72%	84%	77%	72%	67%	N/A	65%	53%	72%	82%
Tokyo	41%	40%	26%	31%	50%	32%	25%	21%	29%	40%
Jakarta	55%	54%	51%	45%	53%	49%	42%	45%	47%	38%

Table 36: For each of the following, how satisfied are you with this aspect of your life? Q4

Overall, City Dwellers Have Positive Body Images and Don't Believe Themselves to be Overweight

In general, inhabitants of some of the world's largest cities don't believe they are overweight, despite reports from leading health organizations, such as WHO, that point to an increase in the obesity epidemic globally.

Residents of Abu Dhabi and Delhi are most likely to feel this way (that they are not overweight), while those in Amsterdam and London are most likely to consider themselves overweight.

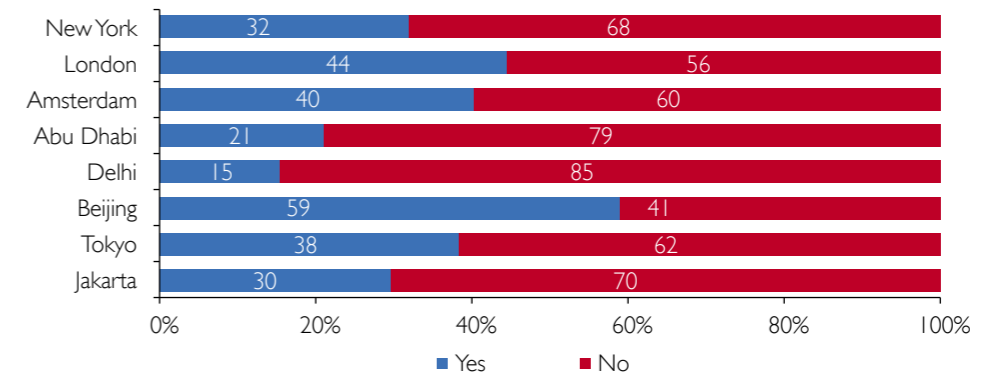


Figure 21: Do you consider yourself to be overweight? Q21

⁴⁷ In China this question was asked as "Do you consider yourself to be in a state of sub-health?"

Among Major Cities, New Yorkers Are Most likely to Feel Sleep Deprived

Compared to other major cities around the globe, New Yorkers are the most sleep deprived. Those living in emerging nations, such as Abu Dhabi, Jakarta, and Delhi, are most likely to be getting a good night's rest.

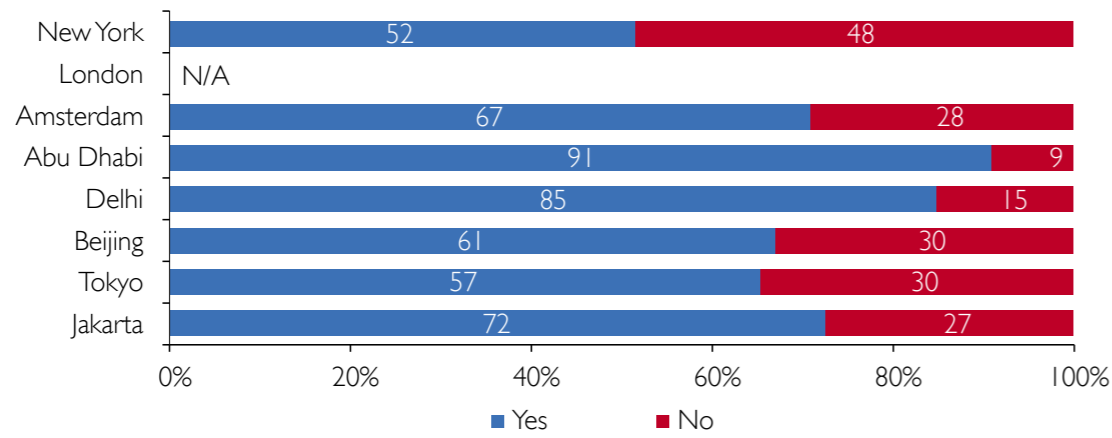


Figure 22: Do you get enough sleep at night? Q24
⁴⁸ The question was not asked in this manner in the UK.

Most Are Experiencing Some Level of Stress in Their Lives

While degrees of stress vary by city, most urbanites report that they experience some level of stress. Those in London are most likely to say they feel very or somewhat stressed, while those in Abu Dhabi and Jakarta are the most likely to report feeling no stress.

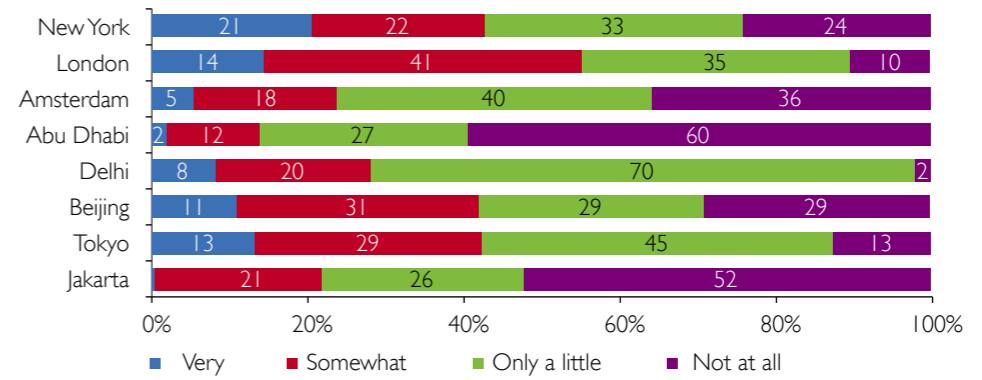


Figure 23: How stressed do you consider yourself to be? Q27

VII b. Independent Living Changes in Health and Well-being

Overall, global sentiment in cities about health and well-being has stayed the same or improved over the past five years. City dwellers in Abu Dhabi and Delhi are more likely than others to say that their feeling of health

and well-being has got much better in the past five years. In contrast, Tokyo, New York, Amsterdam, and London residents are more likely to say that their health has got slightly worse or much worse.

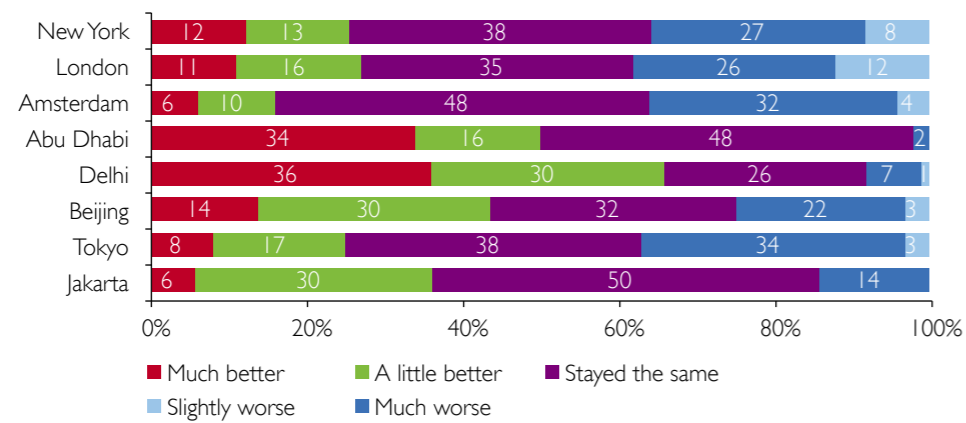


Figure 24: Would you say your feeling of health and well-being has got much worse, slightly worse, stayed the same, got a little better, or got much better in the last five years? Q2

Potential Threats to your Health

City dwellers are most concerned about declining vision and obesity as major threats to their health in the next five years. New Yorkers tend to be the most concerned about each of these health threats (except for declining

vision) compared to their global counterparts. Abu Dhabi are the least concerned with obesity than other cities, despite statistics from the WHO that state one in four men, and four in 10 of women, are obese.

	Declining Vision	High cholesterol	High sugar amount/diabetes	Being overweight/obesity	Heart attack	AIDS
New York	39%	30%	31%	31%	31%	14%
London	28%	25%	16%	27%	12%	2%
Amsterdam	23%	21%	15%	21%	5%	0%
Abu Dhabi	12%	10%	10%	6%	0%	N/A
Delhi	30%	8%	12%	19%	5%	0%
Beijing	35%	19%	10%	28%	13%	0%
Tokyo	48%	16%	9%	17%	4%	1%
Jakarta	39%	27%	13%	20%	11%	2%

Table 37: Which of the following are you concerned about as potential threats to your health in the next five years? SELECT ALL THAT APPLY Q9

VII c. Communities

Importance of Community to Health and Well-being at the City Level

Residents in some of the world's major cities place high importance on the community they live in with regards to its impact on their overall sense of health and well-being. However, not all place equal value on how

much they contribute. Those in London and Amsterdam believe their community contributions are less important to driving well-being than their counterparts in New York, Abu Dhabi, Delhi and Jakarta.

	The Community You Live In	How Much You Contribute To Your Community
	Importance to H&WB	Importance to H&WB
New York	83%	81%
London	78%	51%
Amsterdam	98%	52%
Abu Dhabi	93%	87%
Delhi	96%	92%
Tokyo	68%	N/A
Jakarta	89%	89%

Table 38: How important are each of the following to your overall health and well-being? Q3

Safety and Crime Are the Most Important Aspects in an Ideal Community among Key Cities

With the exception of London, global city dwellers say safety/crime, access to healthcare and the quality of local hospitals are most important when choosing an ideal community in which to live. Local schools are more

important to residents of Jakarta, New York, Delhi and Abu Dhabi, as is the availability of employment in those cities.

	Safety and Crime	Local Schools	Access to Healthcare	Local Hospitals	Availability of Employment	AIDS
New York	96%	70%	95%	95%	79%	14%
London	50%	38%	48%	44%	45%	2%
Amsterdam	93%	35%	82%	55%	53%	0%
Abu Dhabi	99%	93%	97%	99%	99%	N/A
Delhi	88%	93%	92%	99%	87%	0%
Beijing	88%	68%	83%	85%	N/A	0%
Tokyo	88%	42%	60%	81%	57%	1%
Jakarta	94%	95%	93%	90%	85%	2%

Table 39: When you think of the community you would most like to live in, how important are each of the following? VERY IMPORTANT / SOMEWHAT IMPORTANT Q29