

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Health-related behaviours since COVID-19.
- The state of the nation's health and the amount of effort people put into staying healthy.
- The state of mental health since COVID-19.
- Interest in health-related behaviours in the future.
- Behaviours and attitudes towards healthy lifestyles.
- · Health factors that consumers would like more information on.

People's perception of their general health is unchanged, with the majority considering themselves either average or somewhat healthy (70%). This comes despite media coverage highlighting the poor state of the nation's health during the pandemic, particularly the high levels of overweight and obesity. The new government obesity strategy is consequently commencing from a difficult starting point, given that a shift in mindset is imperative to behaviour change.

The pandemic has been a wake-up call for some, with 47% of people stating that COVID-19 has made them more worried about the impact of their weight on their health. In addition, 26% of people report exercising more compared to before the COVID-19 outbreak. Health initiatives, as well as brands and services looking to harness this increased concern into action, need to work quickly to provide the support and structures that help people change their habits, and make it as easy as possible.



"The COVID-19 pandemic has brought the true state of the nation's health into unprecedented focus. With the majority of people still considering themselves either average or somewhat healthy, however, the new government strategy is commencing from a difficult starting point."

Alice Pilkington, UK Food and Drink Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
America	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: Market context
- Economic and other assumptions

EXECUTIVE SUMMARY

Impact of COVID-19 on healthy lifestyles

Figure 1: Short, medium and long-term impact of COVID-19 on healthy lifestyles, 13 November 2020

- The market
- COVID-19 brings the true health of the nation into focus...
- ...and drives new government strategy
- Considerable support for government measures, but a disconnect remains
- COVID-19 prompts some to make exercise higher priority
- COVID-19 sees alcohol intake increase for some
- The consumer
- COVID-19 hasn't changed people's perceptions of their health

Figure 2: People's perception of their general health, 2017-20

'Everything in moderation' continues to be majority attitude
 Figure 3: Behaviours relating to healthy habits, by gender,
 September 2019 and August 2020

Home-based hobbies see considerable boost

Figure 4: Health-related behaviours since the COVID-19 outbreak, August 2020

COVID-19 exacerbates the anxiety crisis

Figure 5: State of mental health since the COVID-19 outbreak, August 2020

· Tracking fitness sparks interest from nearly a third

Figure 6: Interest in health-related behaviours in the future, August 2020

 Nearly half are more worried about impact of their weight on their health since COVID-19

Figure 7: Behaviours related to managing a healthy lifestyle, August 2020

- Energy levels hold most interest, while mood is close behind
 Figure 8: Health factors that consumers would like information on, August 2020
- Majority believe physical health is crucial to good mental health

Figure 9: Attitudes towards healthy lifestyles, August 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



ISSUES AND INSIGHTS

- COVID-19 may provide impetus for change, but new government strategy will face considerable challenges
- Creating healthy communities and encouraging family fitness are crucial
- Opportunities for brands and services to align with mood boosts within anxiety epidemic
- Physical and mental wellbeing need to be more strongly linked

THE MARKET - KEY TAKEAWAYS

- COVID-19 puts nation's health in spotlight
- New government strategy targets diet and physical fitness
- Considerable support for government measures, but a disconnect remains
- COVID-19 prompts some to make exercise higher priority
- COVID-19 sees alcohol intake increase for some

MARKET DRIVERS - DIET

- COVID-19 brings the true health of the nation into focus...
 Figure 10: Trends in body mass index (BMI), England,
 1995-2018
- · ...and drives new government strategy
- Considerable support for government measures, but a disconnect remains
- Sugar reduction targets see mixed success...
- ...but SDIL sees more impressive results
- Food industry tasked with 20% calorie reduction by 2024
- Categories struggle to meet 'aspirational' salt reduction targets
- Perception that eating healthily is expensive will be barrier during recession
- Warnings that the poorest struggle to meet nutrition guidelines
- Marcus Rashford's campaign draws attention to food poverty

MARKET DRIVERS - PHYSICAL FITNESS

- Pre-COVID activity levels had shown signs of improvement
- COVID-19 prompts some to make exercise higher priority
- COVID-19 forces people to get creative to keep fit...
- People turn to home workouts

Figure 11: Taking part in more home workouts as a result of the COVID-19 outbreak, 26 March-16 April 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
Americas China	+1 (312) 943 5250 +86 (21) 6032 7300

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- Interest in home exercise equipment increases
- · ...whilst gyms and fitness trainers move online
- Getting fit is key element of new government strategy
- · Public transport out; walking and cycling in

MARKET DRIVERS - SMOKING AND ALCOHOL INTAKE

- Stoptober wants to help people 'start breathing easier'
- A minority were limiting alcohol intake pre-COVID-19
- Younger demographics demonstrate more moderate approach to alcohol
- COVID-19 sees alcohol intake increase for some

MARKET DRIVERS - MENTAL HEALTH

- Research confirms there has been an "explosion" in anxiety
- Women and younger demographics more likely to be anxious
- · Age UK research reveals effect of isolation on the elderly

THE CONSUMER - KEY TAKEAWAYS

- COVID-19 hasn't changed people's perceptions of their health
- · 'Everything in moderation' continues to be majority attitude
- COVID-19 exacerbates the anxiety crisis
- Nearly half are more worried about impact of their weight on their health since COVID-19
- People would like information on improving energy levels and mood
- Majority believe physical health is crucial to good mental health

STATE OF THE NATION'S HEALTH

- COVID-19 hasn't changed people's perceptions of their health
- 16-34s most likely to describe themselves as very healthy
 Figure 12: People's perception of their general health,
 2017-20
- Minority think they are unhealthy, at odds with obesity crisis
- Few firm measures for gauging being fit or healthy
- Government campaign faces difficult starting point
- Household income remains a determining factor in health perceptions

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



AMOUNT OF EFFORT PEOPLE PUT INTO STAYING HEALTHY

- Slight decline in number of people being strict with themselves
- Achieving a perfect healthy lifestyle is contentious and complicated

Figure 13: Behaviours relating to healthy habits, by gender, September 2019 and August 2020

- 'Everything in moderation' continues to be majority attitude
- Growth in 'comfort' categories speaks to this balance, but challenges lie ahead
- Healthy products and services should stress that they are for the average person
- Focusing on little steps towards healthier habits is crucial
- · Avoiding public transport encouraged as way to get fitter
- Establishing communities around healthy initiatives will be important to success

HEALTH-RELATED BEHAVIOURS SINCE COVID-19 OUTBREAK

- Home-based hobbies see considerable boost
 Figure 14: Health-related behaviours since the COVID-19 outbreak, August 2020
- Brands focused on home-based activities must mirror instore services online
- Showcasing scope to bring people together during COVID-19 will also help hobby brands
- Challenge for these brands is to maintain their relevance long term

STATE OF MENTAL HEALTH SINCE COVID-19 OUTBREAK

- COVID-19 exacerbates the anxiety crisis
 Figure 15: State of mental health since the COVID-19 outbreak, August 2020
- COVID-19 prompts health and financial concerns

Figure 16: Concern about being exposed to coronavirus, 28 February-1 October 2020

Figure 17: Trends in consumer sentiment for the coming year, January 2019–October 2020

- Limitations of nationwide lockdown will have fuelled anxiety levels further
- More women report being anxious since COVID-19 than men, financial health linked to less anxiety

Figure 18: Changes in feeling anxiety since the COVID-19 outbreak, by gender, age and financial situation, August 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- 16-34s are most likely to have felt less anxious
- Offering mood boost ideas could build power of 'feelgood' brands
- Food and drink and brand link-ups with relevant personalities hold potential
- Marketing should focus on messages of resilience and moving forward
- 28% have felt more lonely since the COVID-19 outbreak
- Feelings of loneliness higher in younger demographics and women
- Opportunities lie in offering connection
- Technology can help link people with similar interests

INTEREST IN HEALTH-RELATED BEHAVIOURS IN THE FUTURE

- Tracking fitness sparks interest from nearly a third
 Figure 19: Interest in health-related behaviours in the future,
 August 2020
- Technology is seen by many to facilitate healthier habits...
- · ...but barriers to usage remain
- COVID-19's spotlight on health could provide catalyst to interest in health tech
- Interest in home-testing health kits suggests potential for link-ups
- Fitness trackers may hold potential for spotting signs of illness that need to be tested
- Wearable technology brands should emphasise community elements
- · A quarter interested in mindfulness techniques
- A change in terminology could support interest

BEHAVIOURS RELATING TO HEALTHY LIFESTYLES

 Nearly half are more worried about impact of their weight on their health since COVID-19

Figure 20: Behaviours related to managing a healthy lifestyle, August 2020

- COVID-19 has made 16-34s more worried; older demographics already aware
- Government initiatives can offer the tools to help people change
- Widespread confusion around healthiness of food
- Healthy brands should push credentials to benefit from heightened concern

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- 45% of parents are more worried about their children's physical health
- · Online platforms are key to providing family fitness content
- Exercise can provide motivation to eat healthier
- Tie-ups with exercise brands are a good way to go for healthy food products

HEALTH FACTORS THAT CONSUMERS WOULD LIKE INFORMATION ON

- Energy levels hold most interest, while mood is close behind
 Figure 21: Health factors that consumers would like
 information on, August 2020
- COVID-19 has mixed effects on nation's sleep health
- Sleep brands should call out the benefits of feeling rested to expand their reach
- · A wide variety of products can benefit
- Encouraging users to track energy levels can support exercise
- · Scope to link with habits supporting mood and energy
- Outdoor brands can leverage the established link between the outdoors and mood
- COVID-19 stimulates interest in immunity
- Research suggests a link between gut health and the immune system

ATTITUDES TOWARDS HEALTHY LIFESTYLES

 Majority believe physical health is crucial to good mental health

Figure 22: Attitudes towards healthy lifestyles, August 2020

- Gyms could look to providing mental health support and nutritional guidance
- Asics utilises popularity of podcasts to highlight the role of sport in supporting mental health
- Companies that support healthy habits seen to boost productivity by 56%
- Long-term working-from-home trend brought about by COVID-19 creates new needs
- Digital tracking of grocery shopping appeals to 41%
- Supermarkets could look to Finland for inspiration
- Strong interest in other support from the supermarkets for healthy eating

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Consumer research methodology

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.