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Top Consumer Trends Impacting Health and Nutrition

AMRUTHA SHRIDHAR

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Amrutha Shridhar
Research Consultant, Consumer Insights

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Understanding Consumers' Health-related Behaviours and Choices

Healthy living and behaviours towards health are consistently changing year-on-year. As new trends emerge and information about various ailments and illnesses is shared via more channels than ever before, it is important for companies and brands to understand consumer perceptions and habits when it comes to their health.

Euromonitor International's Survey team developed and launched the Health and Nutrition Survey. This survey was fielded online in February 2019 with over 20,000 respondents across 20 core markets around the world, to provide consumer insight into every day and long-term health behaviours and attitudes.

Working closely with in-house industry experts and analysts, alongside key players within the industry to develop the Health and Nutrition Survey, this survey covers a wide array of topics and key trends within areas such as packaged food, consumer health and sports nutrition.

This report spotlights some of the data and insights found in our 2019 Health and Nutrition Survey, with specific focus on mental well-being, dietary restrictions, sports nutrition as well as vitamins and supplements.

Key Questions Health and Nutrition Survey Answer

Which consumer needs are driving your vitamins and supplements innovation pipeline?

Who are your key consumers in sports nutrition within a specific market?

What is the best way to target specific consumers who are stressed and worried about mental well-being?

How are consumers medical habits and preferences changing?

How can you tailor your services and products to what your key consumers value?

Where will your sales and marketing investments make the most impact within food and nutrition?

Introduction

The landscape of consumer health and nutrition is rapidly shifting with consumers looking to make changes to their healthcare. Constantly changing health trends and large amounts of easily available information on health and nutrition, is blurring the lines of what types of products consumers are using to maintain their health. For example, consumers who previously relied on over-the-counter medicines to treat stress and anxiety may now be shifting their focus to incorporate dietary changes and a more actively lifestyle to treat and prevent this issue.

As consumers are shifting their focus towards a more holistic approach to healthcare, brands and companies need to ensure that they are looking at their products and services with the same view. Therefore, it is important that brands and companies look beyond their immediate competitors and product categories as disruption within health and nutrition industries continues.

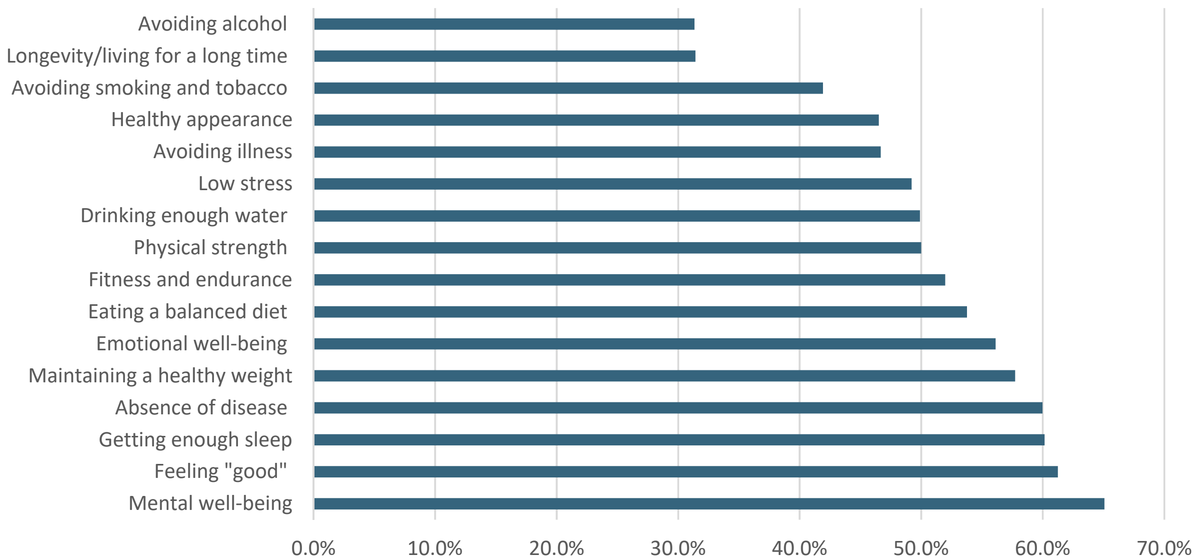
Growing Focus on Mental Well-being

Healthy living has often focused on physical ailments and appearance. Over the past couple of years there has been a dramatic shift in attention to mental well-being, with most global respondents selecting "mental well-being" as the top criteria for being healthy. Consumers are looking at health with a more holistic view and are no longer solely interested in looking good but are highly focused on feeling good as well.

Mental well-being can encompass several areas whether it is feeling relaxed, calm, confident or self-assured, but most importantly consumers are looking to spend time on themselves. There has been a rise in global consumers taking yoga, participating in meditation, demanding flexible working hours to maintain a good work-life balance, spending time on hobbies, friends and family, as well as placing more importance on sleep.

Meaning of "Being Healthy"

Percentage of Global Respondents



Source: Euromonitor International's Health and Nutrition Survey, 2019

Consumer are making active changes in daily behaviours with the aim to lead more balanced lifestyles and maintain mental health. Companies and brands need to adapt their products and services to support these initiatives if they want to resonate with consumers. Not only should products clearly outline features that support mental well-being, whether they help calm, save time or provide a restful night's sleep, but they also need to fit into the consumers' overall lifestyle changes.

Companies and brands should strive to be part of the conversation around mental well-being, providing a product but also building a relationship with consumers based on understanding issues within this field. This could be done by partnering with experts such as fitness instructors, doctors and nutritionists, working with mental health professionals or creating their own community by encouraging consumers to be involved in product development as well as promotions.

The Rise of Stress and Anxiety

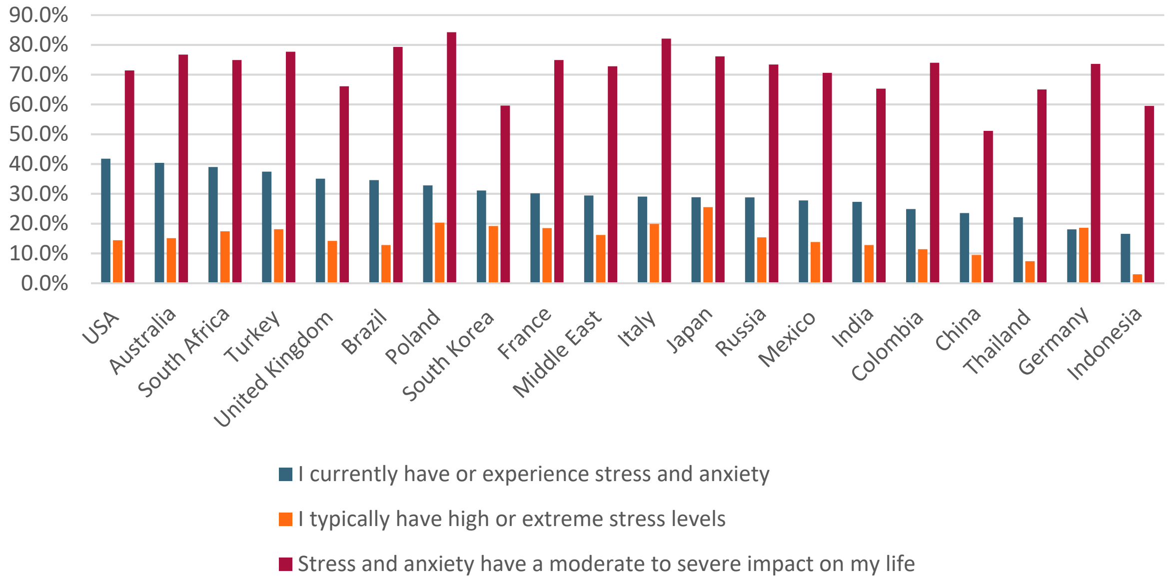
The rise of social media, fast and on-the-go lifestyles alongside fluctuating political and environmental landscapes have great influenced and increased the amount of stress and anxiety consumers feel daily. Though many consumers are focused on work-life balance and the importance of mental well-being continues to grow, stress and anxiety remain an issue for a large part of the population.

A high number of U.S. consumers claim that they are currently experiencing stress and anxiety. However, they describe their stress and anxiety levels as low with little impact on their lives. Though American consumers seem to be facing minimal effects of stress and anxiety, they are some of the most likely consumers to seek treatment for this issue. Around 30% claim to actively treat stress and anxiety. In contrast, Australian and Turkish consumers suffering from low levels of stress and anxiety, feel that it greatly impacts their lives on a day-to-day basis.

The U.S., Australia and Turkey are all examples of countries that could potentially benefit from self-administered stress and anxiety relieving products and services. This could include at-home self-guided meditation routines, or packaged food products that feature perceived calming ingredients. For example, 40% of global consumers take green tea extract for mood and relaxation purposes. If companies and brands position their products and services as easy-to-use with low impact on daily lifestyle habits and to provide daily relief, they are likely to do well with these consumers.

Stress and Anxiety

Percentage of Global Respondents by Country



Source: Euromonitor International's Health and Nutrition Survey, 2019

Consumers in countries such as Poland and Italy did not experience stress and anxiety as widespread as other markets, such as USA, Turkey and Australia. However, these consumers seem to suffer from high or extreme levels of stress which greatly impacts their lives. Though these markets might have a more concentrated consumer group interested in stress and anxiety relieving products, brands and companies should not overlook them. Consumers who are seeking these types of products may be more willing to spend money and try new products to relieve them of their stress and anxiety, as well as be the start to a loyal consumer-base.

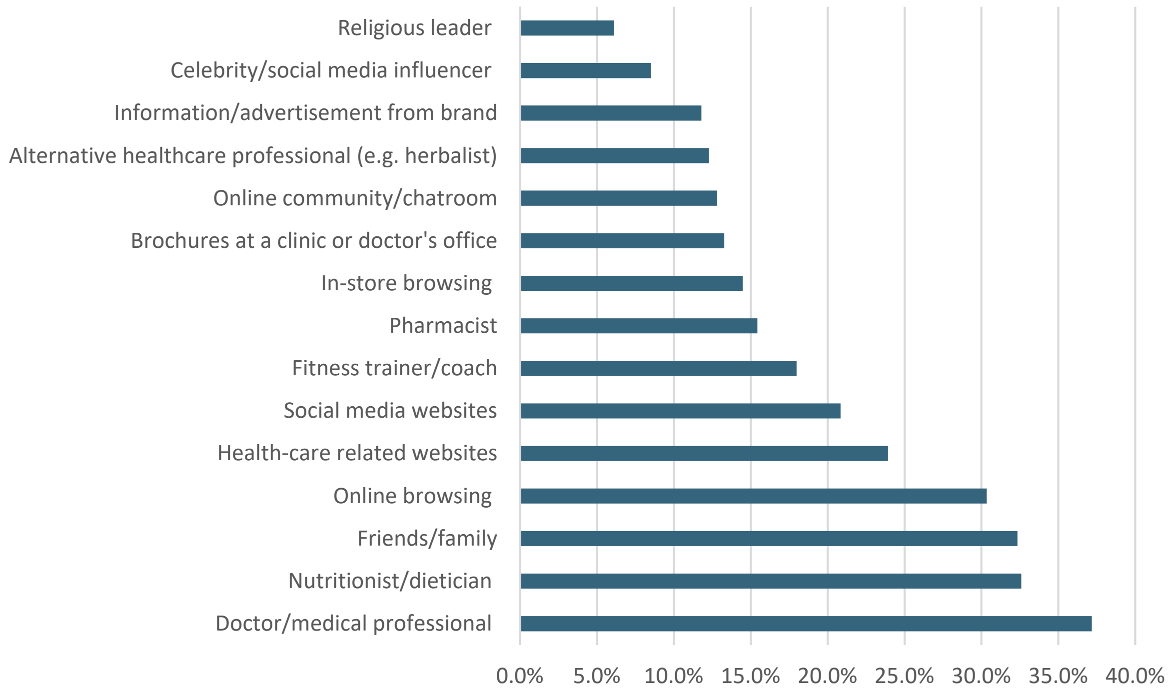
Seeking a Balanced Diet

It may feel that we are constantly being bombarded with the latest diet and nutrition trends, however consumers seem to be seeking more traditional ways of eating. Many of them are focused on eating a balanced meal, seeking a diet that emphasises low sugar, low carbohydrates, low calories and high protein. These consumers want a variety of options, often seeking to include raw foods, dairy-free or vegan products in their diets even though they may not follow strict dietary restrictions such as veganism on a long-term basis.

Companies and brands who produce products aimed at specific dietary restrictions such as veganism should not limit their sales and marketing strategy solely to vegan consumers. Instead they should broaden their targeted audience to include both vegan consumers and the average consumer who is seeking to incorporate vegan products as part of their balanced diet.

Diet Information Sources

Percentage of Global Respondents

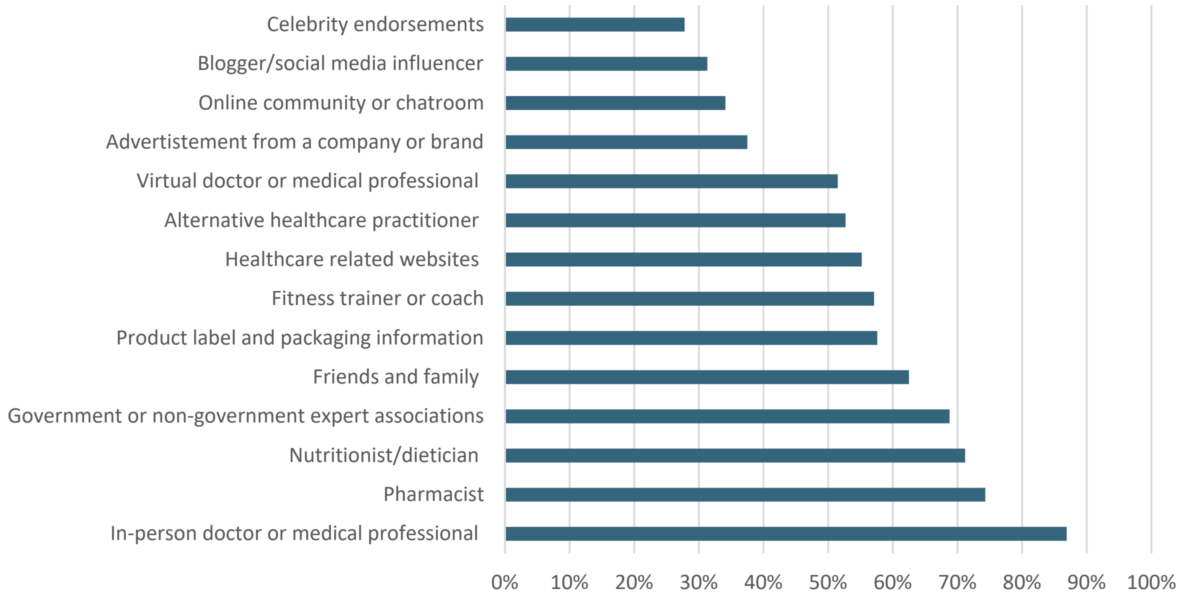


Source: Euromonitor International's Health and Nutrition Survey, 2019

Professionals such as doctors, nutritionists and dieticians are the top information sources when consumers are looking for information on diets and nutrition. However, friends and family, online browsing, health-care related websites and social media are extremely popular as well. Information readily available to consumers via the internet saves time and effort and is often considered just as reliable as visiting a health-care professional.

Trust in Information Sources

Percentage of Moderately and Extremely Trustworthy Global Respondents



Source: Euromonitor International's Health and Nutrition Survey, 2019

Convenience and trust of internet sources has led to an increase of consumers self-diagnosing their issues. This gives brands and companies an additional channel and platform to engage with their customer. Brands and companies should not rely solely on traditional health-care channels but instead should ensure that their products and services are clearly represented via independent reviews, health-care related websites and social media.

Diet Types and Restrictions

Percentage of Global Respondents

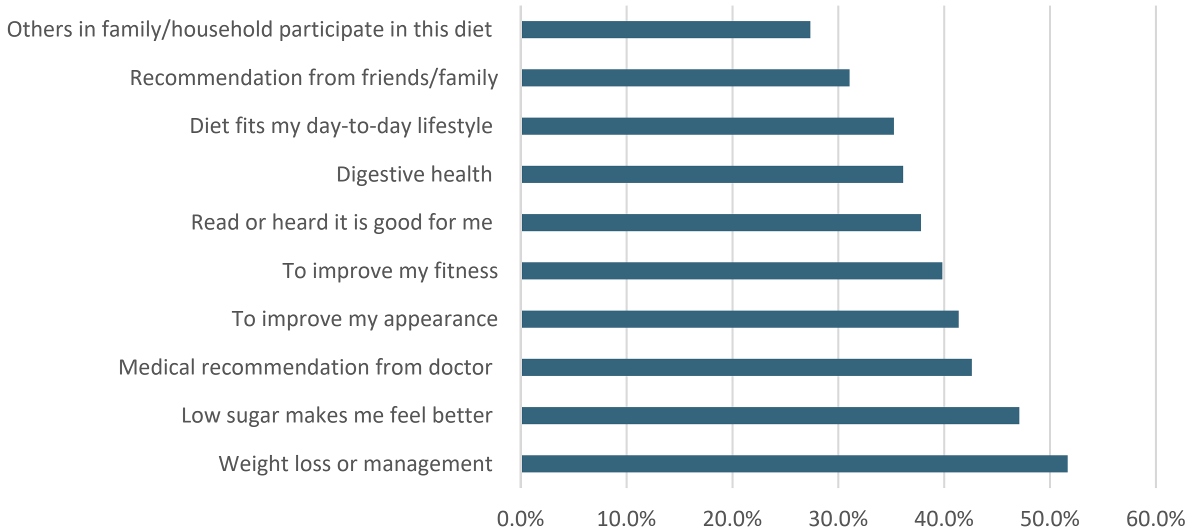
Low sugar 19%	Calorie-restricted 10%	Low/no carbohydrates 9%	High protein 8%	Halal 8%
Vegetarian 6%	High-fat 5%	Intermittent fasting 5%	Gluten-free 5%	Pescatarian 4%
Raw foods 3%	Vegan 3%	Dairy-free 4%	Grain-free 3%	Kosher 2%

Source: Euromonitor International's Health and Nutrition Survey, 2019

Consumers' focus on consuming a balanced diet is not solely for personal health. Many consumers are making changes to support wider issues. Environmental, animal welfare and community engagement are some of the main reasons for seeking features such as locally-sourced, organic and fair trade. Companies and brands that are developing health-focused products with features such as low sugar and high protein should ensure that they also highlight their support for global issues to resonate with these consumers.

Top 10 Reasons for Low Sugar Diet

Percentage of Global Respondents Following a Low Sugar Diet



Source: Euromonitor International's Health and Nutrition Survey, 2019

Medical factors such as doctor recommendations and weight loss or management are key reasons to why some consumers are seeking low sugar diets. However, many consumers are participating in low sugar diets for other reasons. One of the top motivations cited was "low sugar makes me feel better". This goes side-by-side with the holistic approach consumers are taking when it comes to their health and fits into that balanced lifestyle of concentrating on feeling good. Brands and companies producing low-sugar products should highlight the medical benefits as well as contributions to overall wellness.

Maintaining Fitness Through Nutrition

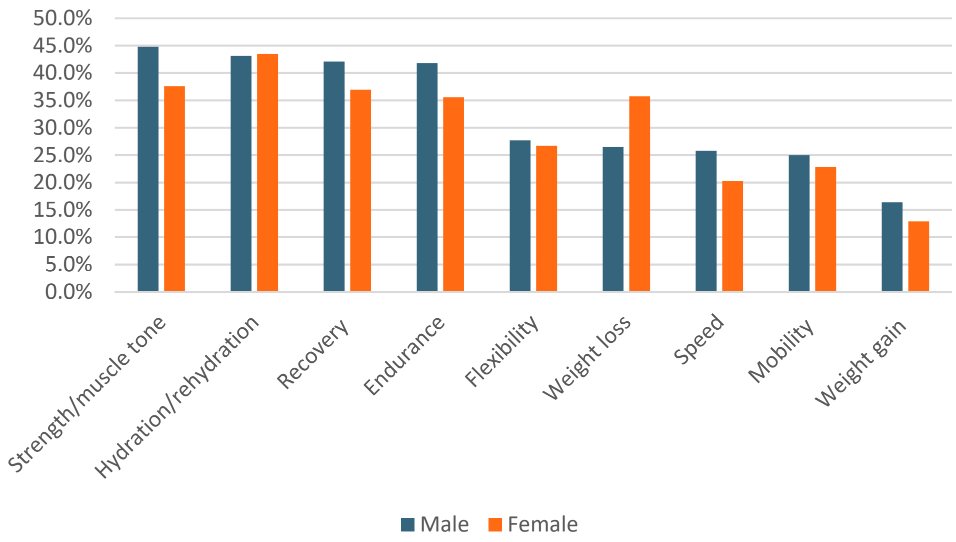
Fitness trends continue to grow, with more and more consumers seeking to combat their sedentary lifestyles and participate in a variety of exercise activities. Consumers are working with personal trainers, joining gyms, participating in running clubs and even staying active on holiday. Alongside mental well-being and healthy eating, exercise is becoming a vital part of leading a balanced lifestyle.

Exercising is not only considered an important method of preventative health-care, but for many consumers it is a significant part of their image. These consumers are looking to portray themselves as healthy and fit, often sharing fitness routines and personal exercise goals on social media to enhance their online image and presence.

Sports nutrition brands and companies need to ensure that they have a strong social media and online presence if they want to reach these consumers. Marketing around the products also needs to be social media friendly. This includes eye-catching packaging that consumers will want to share or an experiential collaboration with a gym that provides both fitness and nutrition.

Reasons for Sport Nutrition Consumption

Percentage of Global Respondents Consuming Sports Nutrition Products by Gender



Source: Euromonitor International's Health and Nutrition Survey, 2019

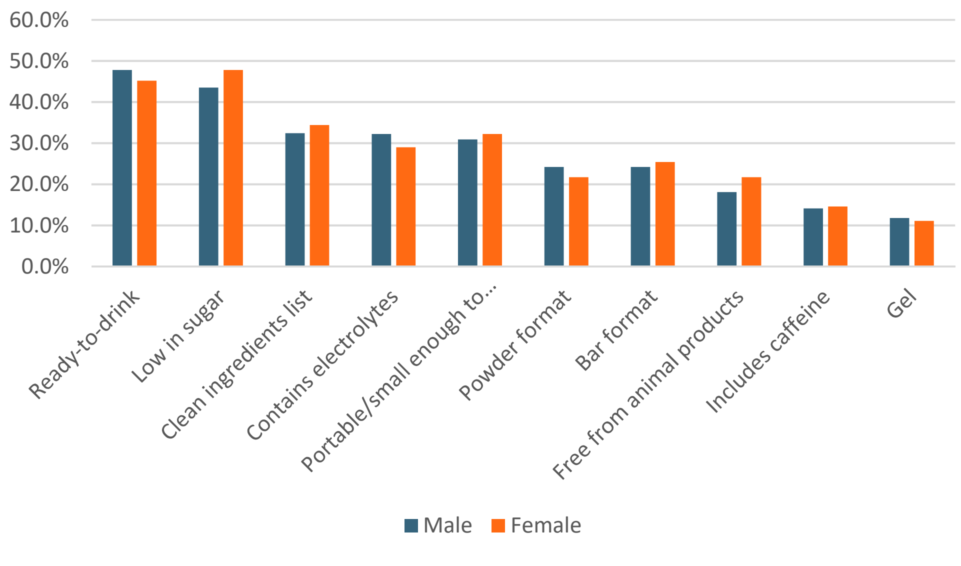
Consumers who live an active lifestyle often seek sports nutrition products to enhance their exercise habits. Electrolyte or hydration drinks and protein or energy bars are the most widely consumed products around the world.

The reasons behind consuming sports nutrition products are relatively similar across genders. Men tend to focus on strength and muscle tone, whereas women tend to concentrate on weight loss. Both men and women are consuming sports nutrition products to hydrate, recover and increase endurance.

It seems that consumers who are looking to maintain a regular fitness schedule are taking sports nutrition products with these features as it allows them to maintain their fitness lifestyle and provide additional support to recover and prepare for the next exercise session. Companies and brands should include and highlight specific features on their sports nutrition products to ensure that they resonate with consumers and in the long-term become part of their regular fitness routine.

Sought-after Sports Nutrition Features

Percentage of Global Respondents Consuming Sports Nutrition Products by Gender



Source: Euromonitor International's Health and Nutrition Survey, 2019

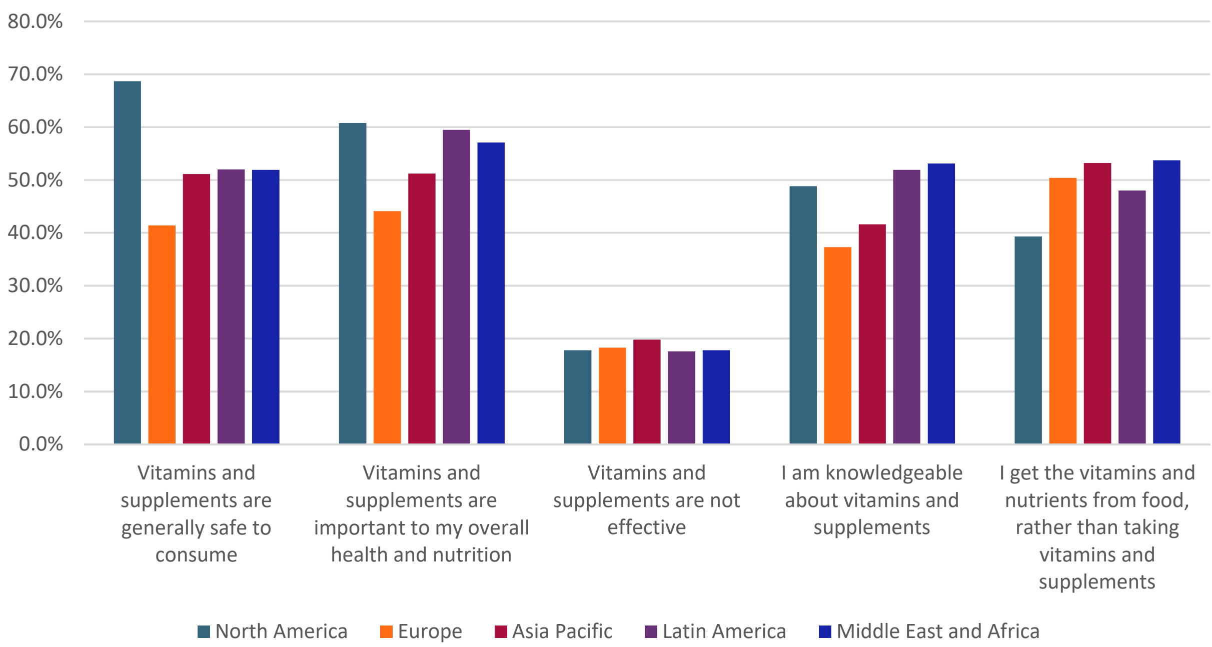
The balanced lifestyle and diets consumers are prioritising are also reflected in the most sought-after sports nutrition features, with ready-to-drink, low sugar and clean ingredients coming out on top. Consumers want to give their bodies and fitness regimes additional support, but they do not want to make any sacrifices or trade-offs in their overall lifestyle. This means avoiding non-natural ingredients, sticking to their regular dietary restrictions and keeping things as convenient as possible.

Prevention Rather Than Treatment

The overall movement towards living a balanced lifestyle and focusing on health-care with a holistic view is rooted in the idea that making these changes can prevent illnesses and ailments in the future. Consumers are looking to make sacrifices and take additional measures within exercise, mental well-being and diet now, rather than seeking treatment for issues at a later stage. However, busy lifestyles and pressures from work and family mean not all consumers are able to dedicate the time to live the healthy and balanced lifestyles they seek. Instead, they look for a compromise, seeking convenient methods of getting nutrients and vitamins through supplements to focus on health and wellness rather than treatment.

Attitudes and Perceptions of Vitamins and Supplements

Percentage of Global Respondents by Region



Source: Euromonitor International's Health and Nutrition Survey, 2019

North American respondents are heavily reliant on vitamins and supplements, with over 50% agreeing that they are safe to consume and that they are important to overall health and nutrition. Compared to other regions, North Americans also seem to be willing to forgo getting their vitamins and nutrients from food. Instead they trust supplements to maintain their health. Eating well and having a healthy diet can be expensive and time consuming. The convenience of vitamins and supplements might therefore appeal to these consumers and is an important feature that companies and brands should highlight in their products.

Top Three Dietary Supplements and Vitamins Consumed

Percentage of Global Respondents Consuming Vitamins and Supplements by Region

North America		Europe		Asia Pacific		Latin America		Middle East & Africa	
Multivitamins	56%	Multivitamins	42%	Vitamin C	44%	Vitamin C	53%	Calcium	46%
Vitamin D	41%	Vitamin C	39%	Calcium	44%	Calcium	50%	Multivitamins	44%
Vitamin C	33%	Vitamin D	38%	Multivitamins	42%	Multivitamins	42%	Vitamin D	41%

Source: Euromonitor International's Health and Nutrition Survey, 2019

Convenience is a driving force for why so many global consumers take vitamins and supplements, however it is also the reason why multi-vitamins are so popular. Multi-vitamins encompass a variety of vitamins in one tablet, making it easy-to-use and efficient to take.

North Americans specifically seek multi-vitamins to maintain their general health, immune system and to give them energy. Instead of focusing on one particular issue, multi-vitamins are thought to provide overall health and wellness, fitting into the ethos of living a balanced lifestyle and focusing on preventative care. The vitamins and supplements market in North America is very competitive. Brands and companies looking to stand out in this space need to ensure that they are looking beyond convenience and general health and focus on consumers' overall long-term health habits and behaviours.

About the Author

AMRUTHA SHRIDHAR
Research Consultant, Consumer Insights
Euromonitor International, London
Connect via LinkedIn

Amrutha joined Euromonitor International as an Account Manager in 2015 and moved on to join the Survey team as an Analyst in 2017. Prior to joining Euromonitor International, Amrutha was an Account Manager at a leading member-based advisory company, working with C-level executives to drive business performance.

Amrutha's key responsibilities at Euromonitor International include: survey development, data cleaning, rigorous data analysis and insightful reporting. These reports focus on the results of Euromonitor International's Lifestyles Survey, Health and Nutrition Survey and consumer segmentation analysis, providing valuable insight that highlight lifestyles and daily habits of global consumers.

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