

# HEALTHY LIFESTYLES – CANADA – 2024

Canadians are generally healthy, but their needs are evolving as mental health gains attention, the market gets older and social media influence grows.



Scott Stewart, Associate  
Director, Lifestyles &  
Retail



# Healthy Lifestyles – Canada – 2024

## This report looks at the following areas:

- Consumers' perceptions of their own physical and mental health
- How consumers maintain/improve their mental health
- How everyday activities affect mental health positively, negatively or neutrally
- The most important benefits of maintaining good physical health
- What types of health-related activities consumers track and how they track them
- Sources of health-related news and information



Canadians are generally healthy, but their needs are evolving as mental health gains attention, the market gets older and social media influence grows.

## Overview

The most common ways that consumers maintain their mental health are to do something they enjoy and to exercise. That means brands which offer enjoyable experiences can reframe their products/services as self-care solutions. Meanwhile, **consumers see the connection between physical and mental health**, making physical health solutions that much more relevant.

Beyond shifting perspectives around mental health, Canada's aging population will have a major impact. By 2043, there will be 11 million seniors in Canada – **nearly triple the senior population** of 2003. Age-related health issues – and the necessary preventative measures – will therefore become increasingly important.

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Today, there's no shortage of health information – the challenge is sifting through it. Wearable tech and mobile apps give consumers more health data than ever before and social media offers an unending amount of information and opinions. For consumers, **the biggest hurdle is determining who to trust and how to optimize their data.**

Nevertheless, **the opportunity is to have new conversations with consumers.** They can use their personal data to make smarter health decisions for themselves and reframe everyday activities as positive or negative mental health influences. This new age of health information has created a blank slate for stakeholders to connect with consumers.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this report

- Overview
- What you Need to Know

### Consumer trends: key takeaways

- Canadians feel good about their health
- Physical and mental health go hand-in-hand
- Too much information, not enough insights
- Keeping it simple: people just want to feel good every day

### Market predictions

- Market overview
- Outlook for healthy lifestyles
- Opportunities
- Challenges

## CONSUMER INSIGHTS

### Consumer fast facts

### Consumer fast facts (continued)

### Self evaluation of mental and physical health

- Most consumers consider themselves healthy
  - Graph 1: current health status, 2023
- Physical and mental health priorities change with age
  - Graph 2: current health status - very healthy, by age, 2023
- Men are more confident in their health status
  - Graph 3: current mental health status - very healthy, by age and gender, 2023
  - Graph 4: current physical health status - very healthy, by age and gender, 2023
- Nearly one in three young women say they're not mentally healthy
  - Graph 5: current mental health status, 18-34 year old women, 2023
- Social media usage could be a factor
- Moms could use some support
- Good health is a luxury

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- Graph 6: current health status – very healthy, by financial situation, 2023
- Leveraging language: improving vs maintaining
- Mental health is lower among LGBTQ+ people
  - Graph 7: current mental health status, overall vs LGBTQ+, 2023
- Bath and Body Works connects with LGBTQ+ consumers in multiple ways
- Opportunities to support physical and mental health

## Reframing products and services as mental health supports

- Mental health maintenance can be enjoyable
  - Graph 8: ways of improving/maintaining mental health, 2023
- Certain consumer groups are particularly inclined to do things they enjoy as a mental health tool
  - Graph 9: ways of improving/maintaining mental health – doing something I enjoy, 2023
- Combining those variables highlights a key target demographic
  - Graph 10: ways of improving/maintaining mental health – doing something I enjoy, overall vs White women with HHI \$100,000+, 2023
- Nespresso reframes coffee as a 'grounding ritual'
- Lots of categories can get in on this reframing
- Looking for win-win solutions

## Ways of maintaining mental health

- There's a connection between mental and physical health
  - Graph 11: ways of improving/maintaining mental health, 2023
- Physical exercise skews heavily to higher-income consumers
  - Graph 12: ways of improving/maintaining mental health – physical exercise, by household income, 2023
- Overlap between physical exercise and doing something you enjoy
- GoodLife brings physical and mental health together
- Faith, BPC, meditation and medication are also common
  - Graph 13: ways of improving/maintaining mental health, 2023
- Women are more likely to leverage these tools for mental health
  - Graph 14: ways of improving/maintaining mental health, by gender, 2023
- Nature's Way Less Stressed Gummies
- Explaining women's higher usage of faith/religion/spirituality
- BPC routines skew heavily to certain demographic groups
  - Graph 15: ways of improving/maintaining mental health – beauty/personal care routine, by age/gender, race and time in Canada, 2023
- Dove reminds consumers to take care of themselves
- Fenty Beauty wants to be beauty for all
- Therapy is relatively uncommon
  - Graph 16: ways of improving/maintaining mental health, 2023

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- Age trends indicate a shift towards counselling/therapy
  - Graph 17: ways of improving/maintaining mental health - counselling/therapy, by age, 2023
- Bringing mental health out into the open
- How counselling and therapy impact the market

## Influences on mental health

- Hobbies, exercising and TV/movies have a positive impact
  - Graph 18: activities' impact on mental health, 2023
- Exercise and hobbies skew to the same groups
- Watching TV/movies is more universal, but not quite as positive
- Cineplex encourages moviegoers to 'escape'
- Certain activities have a more neutral effect on mental health
  - Graph 19: activities' impact on mental health - among those who do the activity, 2023
- Neutral activities require more targeted messaging strategies
  - Graph 20: activities' impact on mental health - among those who do the activity, by gender, 2023
- Dads have their own set of housework and chores
- Shopping and video games are positives for younger people
  - Graph 21: activities' impact on mental health - among those who do the activity, by age, 2023
- Nintendo promotes a 'sense of adventure'
- Sports as an opportunity for deeper connections
- Norwich City Football #YouAreNotAlone
- Duty-based responsibilities are generally perceived as positive
  - Graph 22: activities' impact on mental health - among those who do the activity, 2023
- Ways to build off of positivity around work and parenting
- Disney gives families "dreams to wake up excited about"
- Certain day-to-day activities can be a drain on mental health
  - Graph 23: activities' impact on mental health - among those who do the activity, 2023
- Consumer feedback on the impact of the news
- Older generations are the most skeptical of social media
  - Graph 24: activities' impact on mental health - social media - among those who use social media, by generation, 2023
- Consumer feedback about the impact of social media
- How to message around potentially negative activities

## Motivators for good physical health

- Physical health focuses on feeling good and living well
  - Graph 25: top motivators for good physical health (up to 3 selected), 2023
- Older consumers are more focused on long-term health
  - Graph 26: top motivators for good physical health - select items (up to 3 selected), by age, 2023
- Joint health and body pain are top-of-mind for Boomers

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- Physical optimization as a motivator skews younger
  - Graph 27: top motivators for good physical health – select items (up to 3 selected), by age, 2023
- Nike is expanding into strength training
- Personal appearance as a motivator for skin health
- Physical and mental health: two sides of the same coin

## Tracking physical health metrics

- Canadians are keeping an eye on their health
  - Graph 28: health metrics tracked (NET – any tracking), 2023
- Wearable tech is the driver of the leaders
  - Graph 29: ways of tracking health metrics, 2023
- Other metrics are still in the minority
  - Graph 30: ways of tracking health metrics, 2023
- Tech innovations are constantly making tracking easier
- Calorie calculations aren't always easy
  - Graph 31: ways of tracking health metrics, 2023
- Men are the most likely to track their health
  - Graph 32: health metrics tracked (NET – any tracking), by gender, 2023
- Younger consumers are tracking far more metrics
  - Graph 33: health metrics tracked (NET – any tracking), by age, 2023
- Fitbit promotes constant usage of its wearable tech
- Track or it didn't happen
- Noom app leverages tracking to support weight management
- Half of 18-54 year old women track their menstrual cycle
- Help consumers make sense of the data

## Sources of health information

- There is no shortage of health information
  - Graph 34: sources of health information, 2023
- Older consumers depend on healthcare professionals
  - Graph 35: sources of health information, by age, 2023
- Younger Canadians are using emerging online resources
  - Graph 36: sources of health information, by age, 2023
- The growth of digital health information is part of something bigger
- Black and South Asian Canadians are leading users of health influencers
  - Graph 37: source of health information – social media influencers, by race, 2023
- Underrepresented groups are getting a greater voice
- Social media offers near-limitless opinions
- Informal health information on social media can spark fads

- Instagram, Facebook and TikTok are leading platforms
  - Graph 38: social media sites/apps used daily, overall vs consumers who get health information from social media influencers, 2023
- Traditional sources of information are still relevant
  - Graph 39: sources of health information, by age, 2023
- Looking ahead in the health industry

## COMPETITIVE STRATEGIES

### Launch activity and innovation

- Mental health is becoming trackable
- Google is leveraging AI in the medical field
- Partnerships help brands leverage tracked data
- Innovations are getting closer to predictive capabilities
- Alcohol brands are creating health-conscious offerings
- Healthy food innovation is constant
- Sephora adds sexual wellness products to its shelves

### Marketing and advertising

- Pharmacies are positioning themselves as health care destinations
- Crossing convenience with health
- MyFitnessPal connects diet and sleep
- Normalizing mental health conversations

### Opportunities

- Making healthy living easier

## THE MARKET

### Market context

- Canada is getting older
  - Graph 40: share of population by age, 1983-2043
- Physical health conditions are gradually trending upwards
  - Graph 41: current health conditions, 2015-2022
- Mental health has declined in recent years
  - Graph 42: proportion of Canadians aged 12+ reporting very good/excellent mental health, 2015-2021

### Market drivers

- Millions of Canadians are without a health care provider
- Most Canadians have had COVID-19



- Graph 43: self-reported one or more COVID-19 infections, June 2023
- Dental health illustrates the challenges of paid healthcare
  - Graph 44: visited a dental professional in the past 12 months, by household income, December 2022
- Food insecurity ties health to the economy
- Pharmacists' powers are expanding

## APPENDIX

- Consumer research methodology
- Consumer qualitative research
- Generations
- Abbreviations

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