

Wellness Trends to Watch in 2021



evergi[™]
Powered by Brightfield Group

Introduction

56% of Americans say they are often anxious and stressed out. COVID-19, money, and work are leading causes of stress across the general American population. Now more than ever, people need solutions to relieve this stress and maintain wellness.

Consumers are increasingly turning to wellness-focused products to improve their health or protect their bodies during times of stress. Brands have responded with new, innovative products to meet these needs.

That brings us to the biggest wellness trend of 2021: **need state-centric products**. Brands are increasingly offering solutions to specific consumer problems across product types. This trend is especially prevalent in the functional beverages category. Consumers are drinking new beverages with specific effects in mind, and this report highlights the two of the top trending need states: Relaxation and Immunity. Finally, our data has also identified emerging adaptogens and how they are connected to the larger need state of plant-based alternatives.

Evergi Methodology:

Consumers: The survey is fielded semi-annually online with 5,000 US consumers age 21+ (the first wave was fielded 2020). This is a general population survey census-balanced on age, gender, and geography.

Conversations: We collect social listening data from Twitter and Instagram posts utilizing keywords related to wellness. Posts are tagged by product type and sub-type, medical conditions, ingredients, need states, and associated keywords.

Trend to Watch: Need State-Centric Products

The first trend to watch for in 2021 is a shift towards products targeting specific need states. Need states drive purchasing decisions based on what a consumer desires or what they are lacking—what they need. Brands are increasingly creating products to fill specific consumer needs.



- **Relaxation** is a key need state with **82% of Americans agree that reducing stress is a priority.**
- **Immunity** need state is in the spotlight as consumers seek to **proactively build protection against COVID-19.**
- **Sustainability** is the **#1 need state** among US consumers, with shoppers choosing eco-friendly products.
- **Community connection** rewards companies who support social causes that uplift communities.

The Option to be Sustainable

Products that meet consumer needs for sustainability focus on environmental impact. Consumers do not want to feel like part of the pollution problem. Providing shoppers eco-friendly options gives them the choice to decrease their waste.

Consumers aren't limited to sustainable choices at select grocery stores. Whole Foods Market, Inc. and local specialty stores may have been the only place to find eco-friendly packaging 10 years ago. But now, big brands are bringing sustainability to mainstream shelves.

This reflects many CPG brands long-term sustainability goals. Conagra Brands, Inc. replaced their Swiss Miss® round canisters with recyclable cubes as part of its goal to use 100% renewable, recyclable, or compostable plastics by 2025.

Sustainability isn't just for food and beverage packaging. Personal care brands are providing more eco-friendly options, such as L'Occitane, Inc. with its shower oil refill bags. The bags are made of less plastic than bottles and contain double the amount of product.



Finding Community Connection

Products that meet the need for community connection focus on making consumers feel closer to specific groups or supporting their causes. The use of certain products can make people feel like part of a community of users. A Starbucks™ coffee cup provides more than just a jolt of caffeine. To many consumers, it can make them feel like part of something bigger than themselves or bring a sense of elevated status.

Community connection can also come from the values of brand founders. McBride Sisters Collection is the largest black-owned wine brand in the US and was started by two sisters—Robin and Andréa—with the goal *“to transform the industry, lead by example, and cultivate community, one delicious glass of wine, at a time.”* The brand empowers women through its wines. The Black Girl Magic collection celebrates the magic and resilience of Black women, and the SHE CAN collection contributes to a fund that supports professional advancement of women in the wine industry.



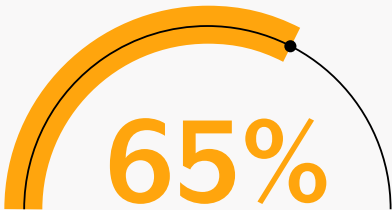
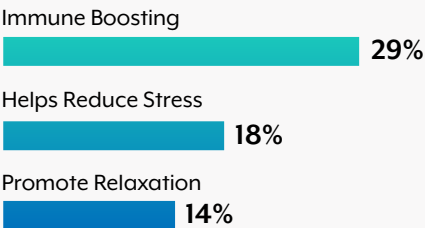
Trend to Watch: Functional Beverages for Relaxation and Immunity

Consumers are drinking their way to wellness with functional beverages. A functional beverage is broadly defined as any drink with purported health benefits. Examples include enhanced waters, sparkling beverages, teas, and energy drinks to name a few. We took a deep dive into different types of [functional beverage](#) consumers earlier this year.

Both immunity and relaxation are in demand, as we discussed in the previous section. It turns out functional beverages is the category creating solutions for consumers in need of relaxation and immunity.

Important Health Claims

% of consumers that look for claim in products they buy



65% of Americans agree that functional foods and beverages can be substituted for some medicines.



Drinking Relaxation to Relieve Stress

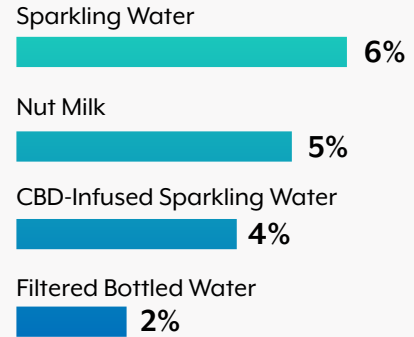
Relaxation is a key need state for **Millennials and Generation X** who are busy balancing work with family. Beverages have emerged incorporating **adaptogens and CBD** to help consumers reduce anxiety.

Products that help consumers manage stress are appearing across categories, but this trend is especially taking hold in the beverage market. Alcoholic beverages—especially wine—already have a strong connection to relaxation.

Functional beverages are also an alternative to relaxing with alcohol. Consumer drinking patterns have changed with less occasions to enjoy alcoholic beverages during the pandemic. Many consumers are reducing their alcohol consumption but still want something to sip on while relaxing after work. There are a variety of drinks infused with functional ingredients that offer consumers an easy way to chill out.

Drinks for Relaxation

% share of voice on Twitter and Instagram



Relaxation Beverages on the Market:



- 1. Driftwell by PepsiCo, Inc.** is a calorie and sugar-free noncarbonated water that contains L-theanine and magnesium.
- 2. Recess' Strawberry Rose Mood** beverage is a sparkling water infused with magnesium and adaptogens to calm the mind and lift the mood.
- 3. XS™ Sparkling+ Magnesium Sparkling Water by Amway** is a 0-calorie sparkling water with a blend of magnesium and glucosamine.
- 4. Smartwater® Tranquility** includes extracts of ashwagandha and tangerine for when you want to hydrate while decompressing at home or on-the-go.
- 5. Tranquini®** comes in a variety of flavors and contains a blend of herbs that traditionally helps people to relax.

Beyond Orange Juice for Immunity

Immunity was a growing need state in 2020 due to the ongoing COVID-19 pandemic. Shoppers of all ages—including older consumers—are actively seeking out ways to reduce their chance of illness in a holistic manner.

Immune boosting beverages are popular. They offer immune boost as part of daily routine. Orange juice is marketed as a great source of vitamin C, and immunity drink mixes like Emergen-C have been on the market for decades. Beverages for immunity are not new to consumers, but new ingredients and formulations have further expanded the options available. Immunity smoothies, teas, mixes, shots, and bottled beverages can be found with ingredients from vitamin C to turmeric and beyond.

Products for Immunity

% share of voice on Twitter and Instagram

Premium Smoothies

29%

Apple Cider Vinegar

7%

Elderberry

5%

Vitamin C

3%

Immunity Beverages on the Market:



1. Frozen Gardens, LLC Immunity Green Smoothie contains fresh ingredients packed with vitamin C, antioxidants and electrolytes for two 10oz smoothies you blend at home.

2. Lifeway's Organic Pomegranate Blueberry BioKefir® Immunity is a high-potency probiotic kefir shot packed probiotics and acerola that is designed to support regularity and immunity.

3. Hydrant® Lemon Ginger Immunity mix can be added to hot or cold water for a tart drink packed with Vitamins A, B6, B12, C, D, Ginger and Zinc.

4. Raw Generation® Ultimate Immunity Shots Pack includes the Immunity Shot, Elderberry Shot, and Vitamin C Shot to fortify your natural defenses.

5. Monin® Immunity Boost was created by a premiere beverage syrup manufacture and product mixes well into cold beverages like sodas and smoothies.

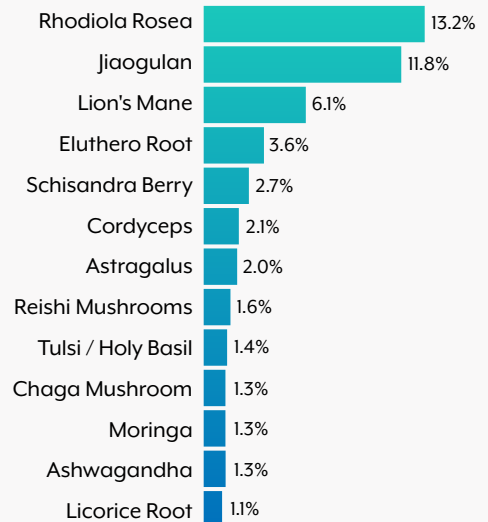
Trend to Watch: Adaptogens + Other Supplements

65% of Americans agree that functional foods and beverages can be substituted for some medicines. Adaptogens are increasingly making their way into functional foods, beverages, vitamins, and even skincare products.

Adaptogens are a category of plants and mushrooms that are thought to increase the body's resistance to stress by "adapting" to what the body needs. Younger consumers are embracing adaptogens to address need states of holistic wellness, relaxation, exercise, and sleep. For example, among consumers who have purchased tea with adaptogens in the last 3 months, Gen Z accounted for **15% of this segment**. Adaptogens are available in multiple formats including supplements (powders, capsules, tinctures), coffees and teas, ready-to-drink beverages, and gummies.

Most Purchased Adaptogens

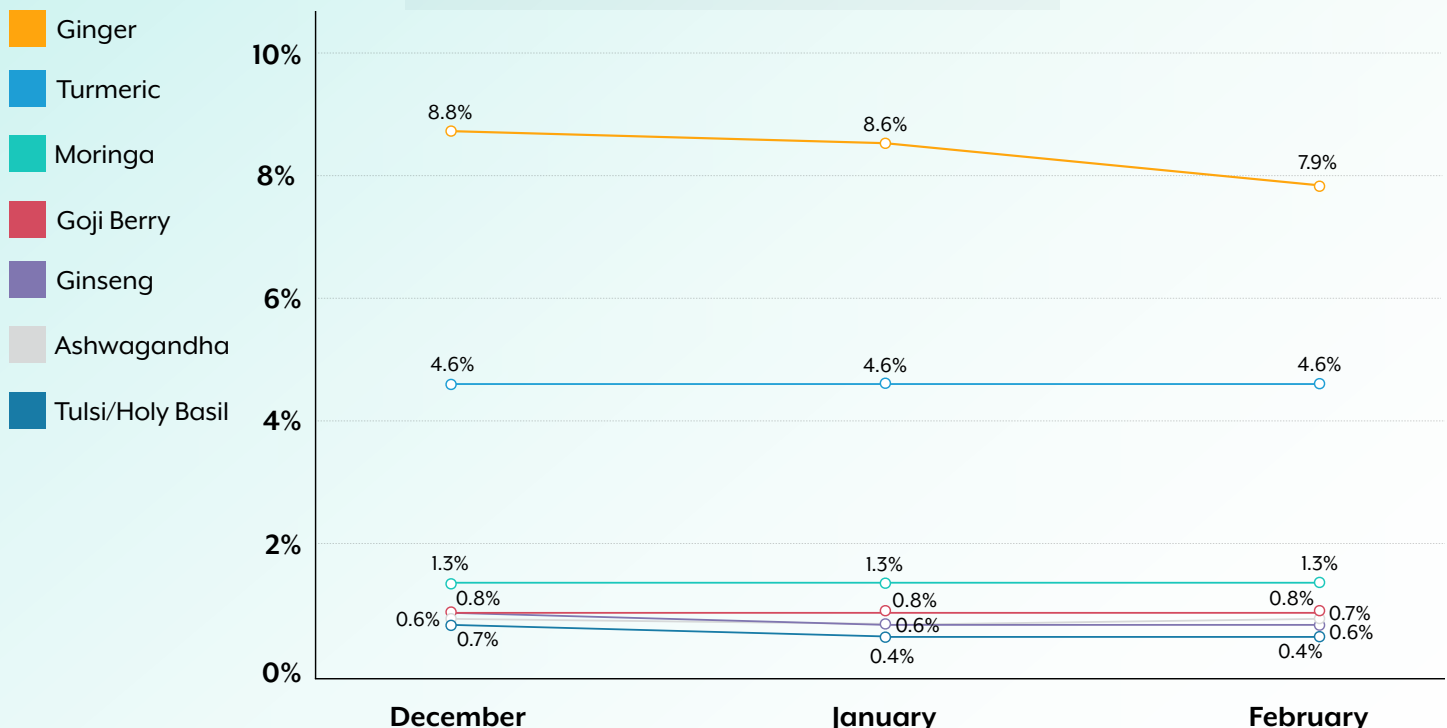
% of general population



Question: In the past 3 months, have you purchased functional food or beverage products with any of the following functional ingredients? Select all that apply.

Most Talked About Adaptogens Over Time

% of share of voice on Twitter & Instagram



Filling the Need for Plant-Based Products

25% of consumers are in the “*plant-based*” need state. People adopt plant-based diets for many reasons, connecting this need state to health, spirituality, and sustainability. A quarter of Americans fall in this need state, but not all are following plant-based diets. 8% of Americans are vegetarian, and 4% are vegan. Other consumers are looking to stay well with plant-based ingredients like adaptogens rather than lab-made additives.

Adaptogens can fulfill diverse need states depending on how the product is positioned. Consumers are looking to achieve specific need states, so brands are already creating line extensions that aim to capture share around a specific problem.

Key Adaptogen Product Types:



1. Brain Forza Labs, Inc. Potenza Natural Pre-Workout is an adaptogen-loaded, plant, mushroom vitamin & amino acid based natural pre-workout that supports energy, focus, power and strength.

2. Four Sigmatic® Mushroom Coffee Mix contains Lion's Mane and Chaga for a balanced brew for brain and body.

3. Moon Juice Sex Dust® contains adaptogenic blend of Shatavari, Shilajit, Epimedium, Schisandra, Cacao & Maca and supports healthy hormonal balance—for creative energy, in & out of the bedroom.

4. Elements, LLC Focus Drink is made with blueberry and clinically-effective levels of the adaptogen Schisandra to help you find concentration when you feel distracted and dull.

Emerging Product Categories for Healthier Alternatives

Other key emerging product trends include:

Alternative Snack Bars

Alternative snack bars contain ingredients historically uncommon in the category, like meat, caffeine, or savory foods. These are typically used as a replacement for other, less healthy snack items.

Most of these snack bars are tailored to a specific diet—like keto, vegan, or gluten-free. Comparable snacks generally do not fit these diets, so alternative snack bars provide an effective snacking solution for these consumers.

Consumers of alternative snack bars more conscious of their health and are engaging in other wellness practices—like dieting or exercising—more than the average consumer. Even without following a special diet, alternative snack bars are an easy way to get specific functional ingredients—whether protein or vitamin C—into one's diet. Especially when compared to powdered supplements, alternative snack bars are a portable, enjoyable way to consume functional ingredients.



Snacking Cheese

Snacking cheese refers to small, individually packaged cheese items, such as cheese sticks, while cheese crisps are created by baking cheese. Cheese is often consumed as a replacement for other snack items as a healthy alternative because cheese is high in beneficial nutrients such as calcium and B12.

Cheese crisps are a great substitute for chips with their similar crunch and healthier ingredients. Consumers who purchase snacking cheese generally integrate it into a wider healthy eating routine and tend to purchase nutritional foods such as fruits and vegetables more than the standard consumer. Like other categories, one of the major trends in this space is added functional ingredients—such as adding probiotics and vitamins.



Key Takeaways

Understanding consumer need states is key to successful new product development.

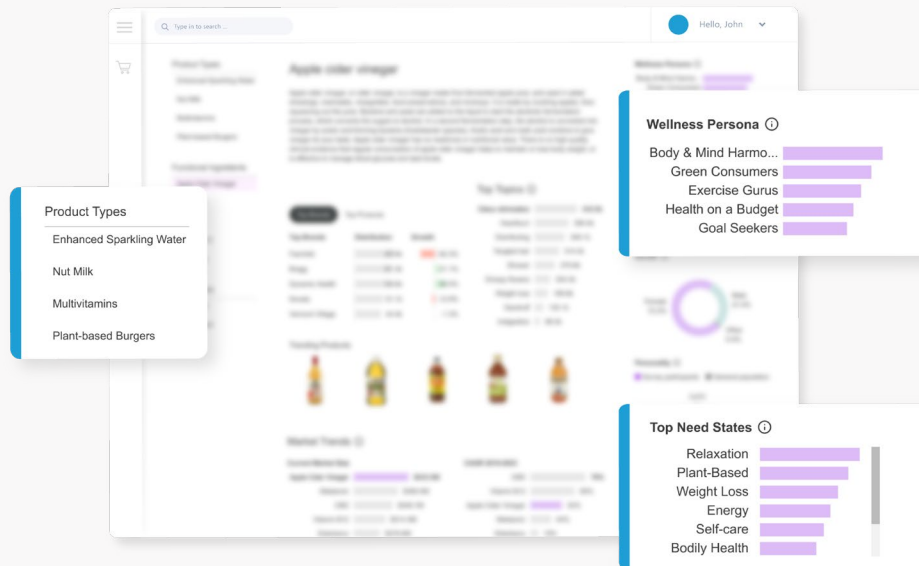
In consumer packaged goods, the consumer should be at the heart of the product. It is important to look at consumer needs holistically—a relaxation drink doesn't only compete with other beverages, but with the overall relaxation category. A product will win when its brand considers what consumers really need—from the ingredients that will resonate the most to where that message will best stick.

Emerging functional ingredients and adaptogens are being quickly adopted by Millennials in products outside of supplements. Americans are turning to their food and beverage products for improved health and wellbeing. They want to control their mood throughout the day without the use of medical intervention or other drugs. A move towards a more natural lifestyle can include mood modification with functional foods and beverages designed for specific needs with targeted ingredients.

These trends are here to stay.

Introducing Evergi, your integrated answer to innovation.

Streamline your go-to-market strategy with integrated research on emerging wellness products.



Brightfield Group is the leading research firm for emerging markets including CBD, Cannabis, and Wellness. By integrating multi-source data with AI and research expertise into our cross-comparable data lake, we uncover robust insights as new markets develop. Since 2015, we have helped Marketing, Innovation, and Insights leaders drive customer-centric strategies on their next big idea.

Learn more at evergi.co.

