
What's Trending in Functional Health and Wellness

evergiTM
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Evergi™ Conversations:
Social listening data from Twitter and Instagram posts utilizing keywords related to wellness. Posts are tagged by product type and subtype, medical conditions, ingredients, need states, and associated keywords.

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

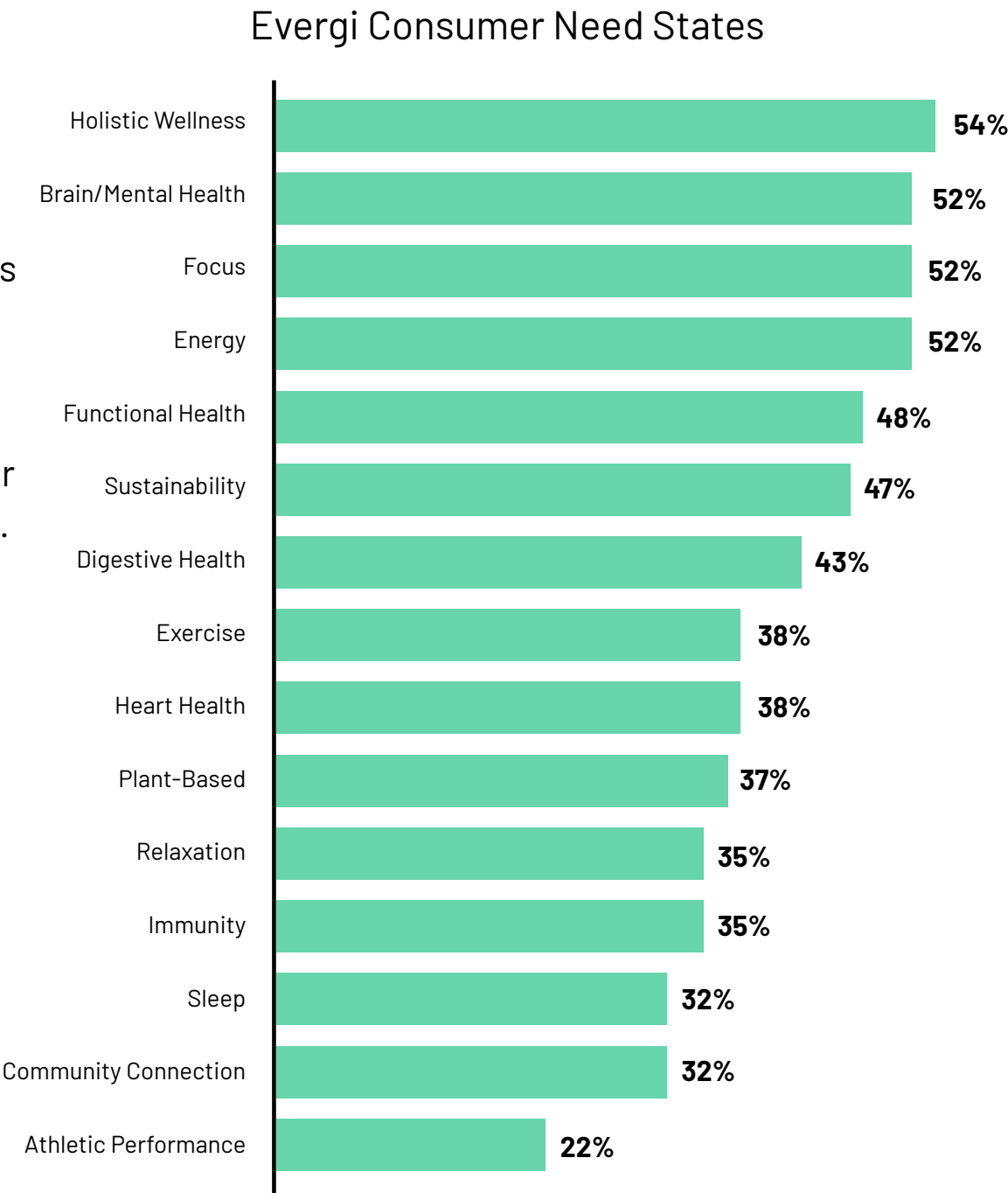
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INTRODUCTION

As the world continues to battle the COVID-19 pandemic, many Americans have shifted their priorities and health goals to best manage their stress. Health concerns have led many to seek ways to increase their overall wellbeing. **Functional ingredients** and consumer products continued to rise—2021 saw accelerated growth among some key power ingredients like **ashwagandha** and **L-theanine**. A robust and growing number of Americans feel that functional foods can replace some traditional medicines, continuing shifts toward alternative medicine and **alternative therapies** among those seeking natural ways to fuel their bodies.

MOST AMERICANS ARE FOCUSED ON HOLISTIC HEALTH, MENTAL HEALTH, FOCUS, AND ENERGY

Evergi need states are segmented based on consumer behaviors and desires for their health and wellbeing. People are multidimensional, so they can fall in multiple need states. We found 15 specific need states among American consumers in the wellness space. The power and importance of these need states ebb and flow by life stage. Younger consumers have a greater need for Focus and Mental Health while older consumers focus more on Heart Health.



Gen Z

Focus 71%
Mental Health 65%



Millennials

Focus 73%
Holistic Health 66%



Gen X

Holistic Health 58%
Mental Health 58%



Baby Boomers

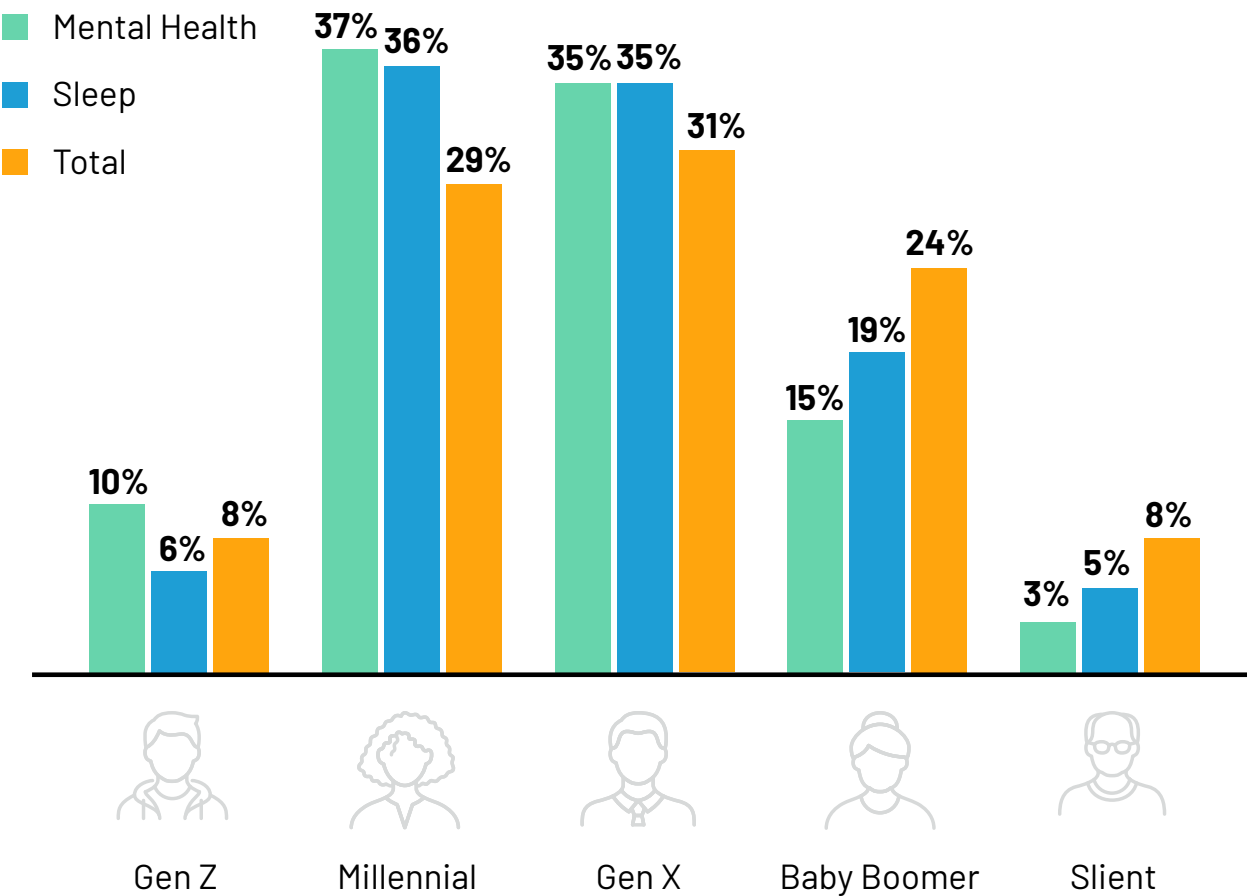
Heart Health 51%
Sustainability 45%



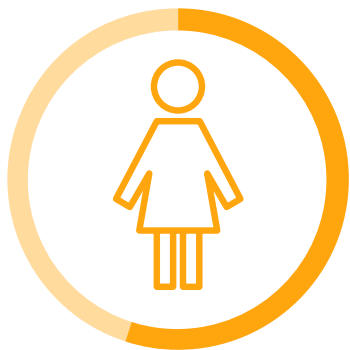
Silent Generation

Heart Health 61%
Sustainability 55%

MENTAL HEALTH AND SLEEP NEED STATES—OVERLAPPING WITH CONSUMERS

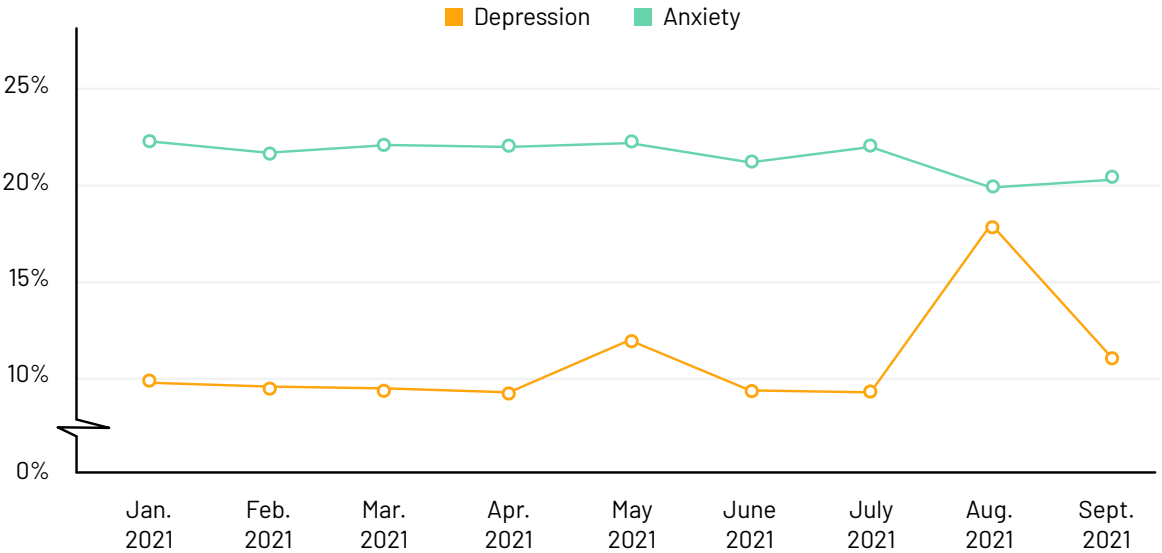


Mental health is a new need state we are tracking in Evergi this quarter. 52% of consumers are focused on impacting their mental health. Social conversations about health conditions see the most chatter around anxiety and depression. Additionally, we found that 32% (+200% since 2020) of consumers are focused on the Sleep need state. The overlap between these two needs states is quite strong. Sleep is incredibly important for mental health, and the lack of it sends people looking to many sources for relief. Many are looking to products and ingredients to help them gain control. **Consumers in these need states skew female (55%), are more affluent, and tend to be Gen X or millennial.**



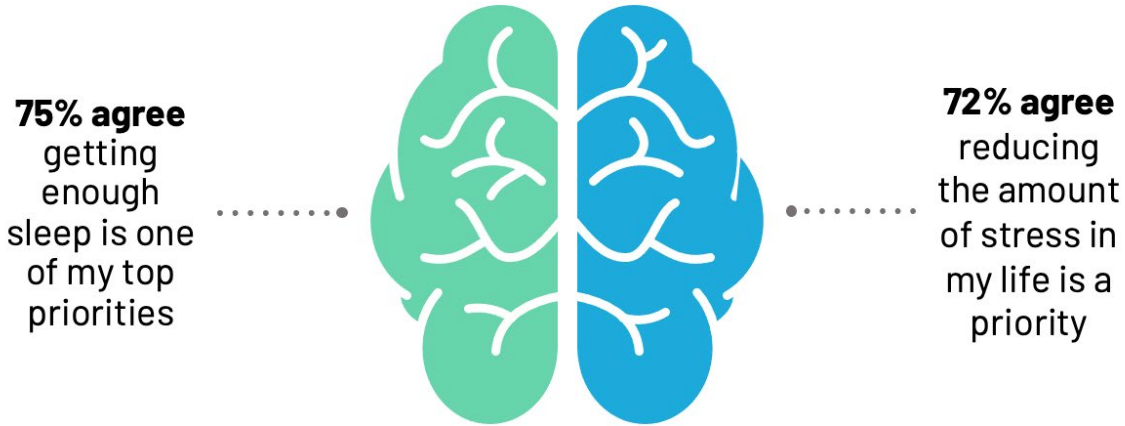
55% Female

TOP SOCIAL CONVERSATIONS IN WELLNESS TOPICS
% Share of Voice

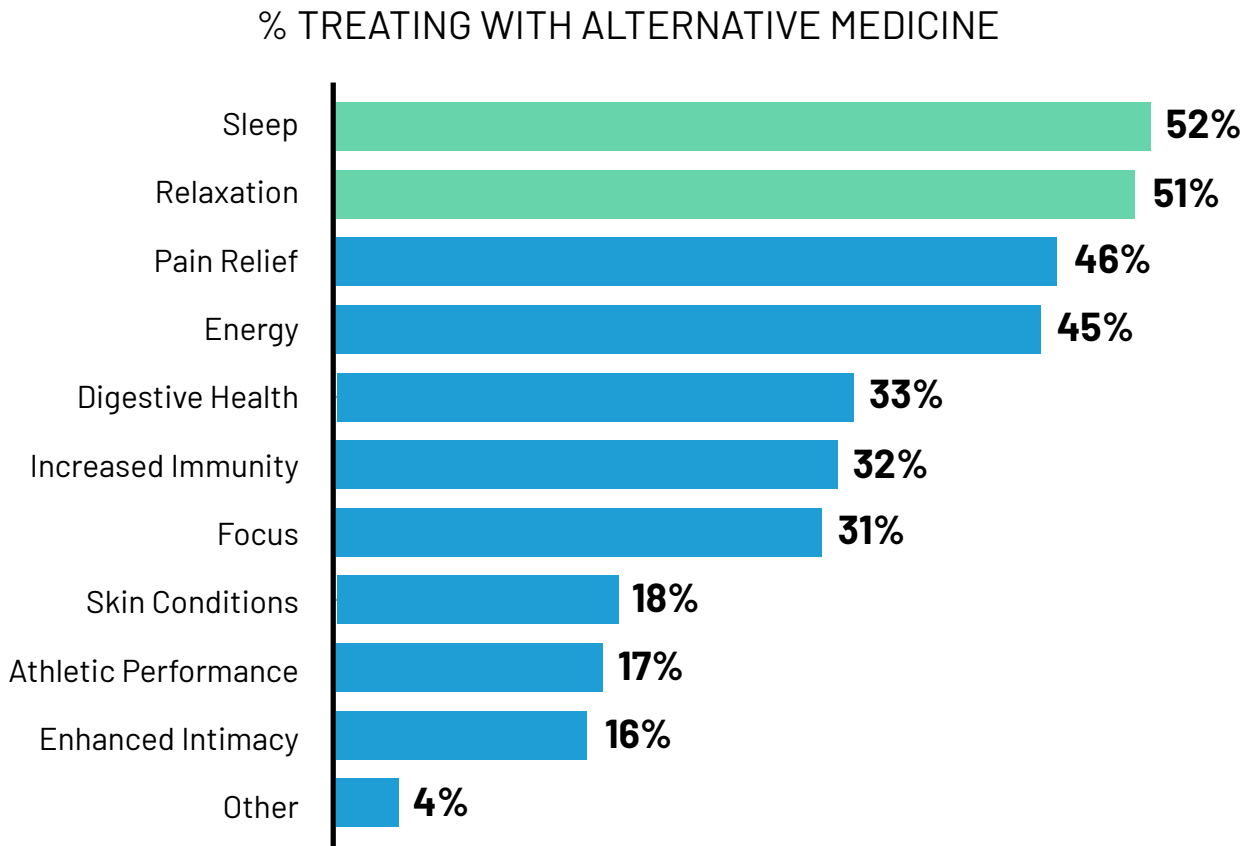


AMERICANS ARE MENTALLY STRAINED BY THE COMBINATION OF STRESS AND LACK OF SLEEP

Money, lack of sleep, and work have been the leaders of Americans’ stress problem for years. **In 2020, “COVID-19” and “the news” were Americans top two stressors.** The old stress standbys are back on top in 2021 with sleep being 20% of Americans’ #1 stressor—a 25% increase since 2020. Americans are turning to alternative medicines and functional ingredients to deal with their sleep and relaxation needs and brands are making it easier than ever to find options.



Almost half of Americans (46%) are turning to **alternative medicine**. Many are looking for help with **sleep and relaxation**.



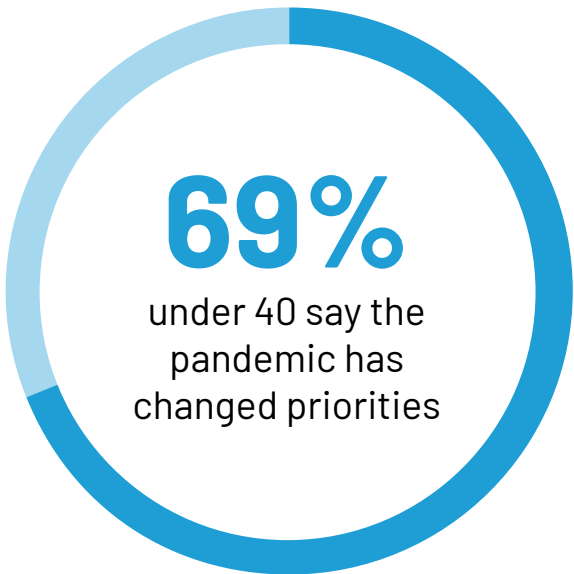
TRADITIONAL MEDICINES ARE BEING REPLACED WITH FUNCTIONAL CONSUMABLES TO INCREASE OVERALL WELLBEING NATURALLY

Consumers are turning to functional foods and beverages instead of traditional medicines to focus on their wellbeing. These products and ingredients are helping them balance gut health, increase immune response, and find ways to relax. In addition, those with high-levels of stress are seeking out alternatives to traditional medicine at much higher rates, indicating an opportunity for brands to make a real impact upon their lives. The branded offerings within these functional categories continue to grow to meet the demand of those consumers venturing outside of the norm.

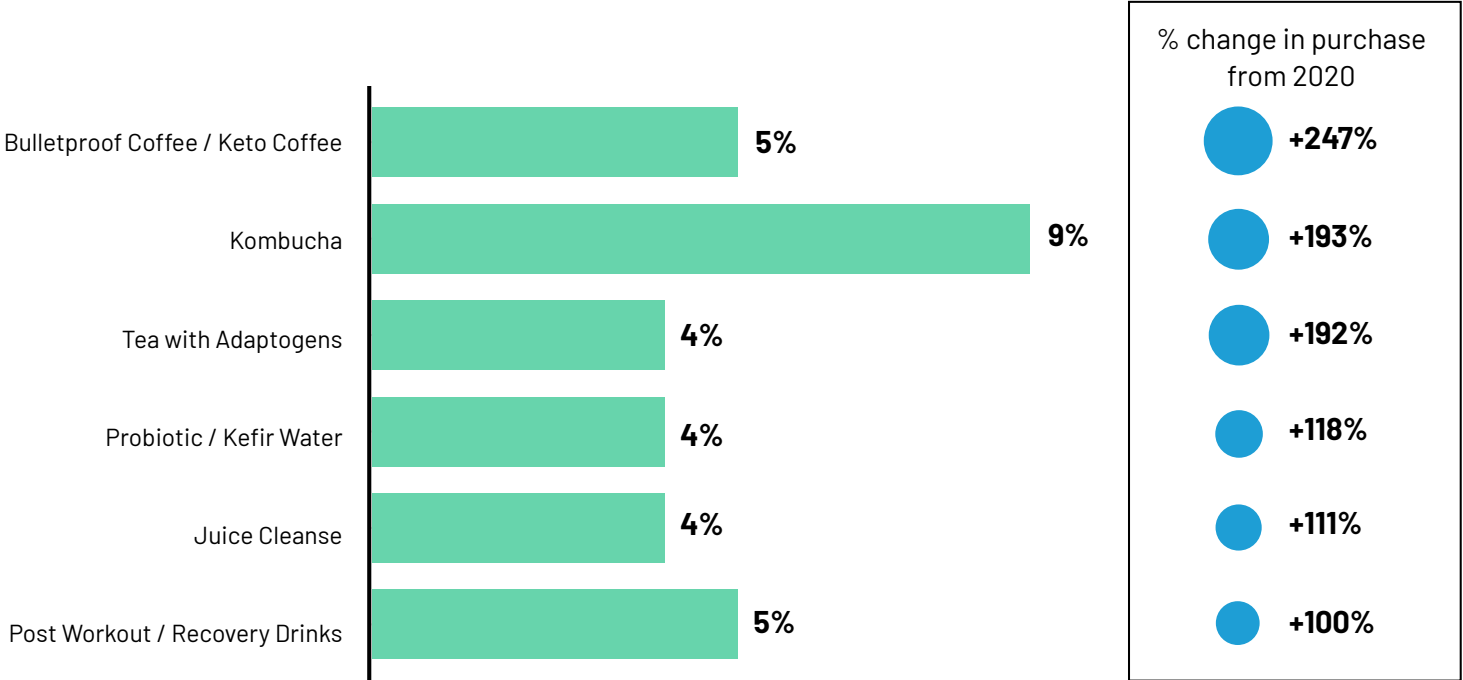


FUNCTIONAL INGREDIENTS AND FUNCTIONAL INGREDIENT-BASED PRODUCT USE IS RISING STEEPLY

The COVID pandemic has led more people to reprioritize and focus on the things they can control, especially Americans under 40. Functional ingredients like adaptogens and probiotics, offer consumers the power to impact their overall health. Products that feature these types of functional ingredients saw the largest increases among products in the 2021 survey.



% PURCHASE FOR PRODUCTS WITH THE LARGEST GROWTH RATE



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KEY TAKEAWAYS

The COVID-19 pandemic has many consumers feeling they lack control over their health and wellbeing. There's seeing an increasing number of consumers looking for functional ingredients and functional consumer products to take back their control. Manufacturers of consumer goods are capitalizing on those wanting consumers with better functional food and beverage solutions. Providing an app or integration to the consumer wellness space will be the key to capture consumers' share of wallet.

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With the pandemic, consumers are looking for ways to support their health and wellbeing. There's a growing trend of consumers looking for functional ingredients and functional consumer products to take back their control.

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Brightfield Group is the leading research firm for emerging categories 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.

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