
Flu (Fighting) Season: Functional Beverages & Immunity

evergi[™]
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Evergi Introduction & Report Methodology

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:

Survey fielded quarterly online with 5,000+ US consumers age 21+. Most recent wave was fielded in October 2022. This is a general population survey, census balanced on age, gender, and geography.

What is Evergi & How We're different?

Evergi™ integrates consumer surveys, social listening, expert analysis, and more in a single platform to create a 360-degree view of emerging wellness attitudes and trends.

With in-depth survey data integrated with social media, users can filter and get answers on:

- Consumer Demographics
- Consumer Attitudes and Behaviors on Diet, Shopping, Exercise, and more
- Brand Affinities
- Usage and Interest on a broad range of products and functional ingredients

Learn more as an Evergi Partner!

This report includes **just a fraction of the data and insights** that Brightfield Group clients receive. Contact us **to access the full report** and learn how consumer **insights amplify Point-of-Sale data** to help you better understand the roadblocks and opportunities across the CBD market.

In the full report, you'll learn:

- Which consumers are in the immunity need state
- What ingredients consumers are seeking
- Top delivery vehicles for immunity supplements
- More category spotlights, including Immunity Tonics, Drink Mixes, Tabs, and Supplements
- How brands are standing out in the functional health space
- A deeper look at the competitive landscape and emerging new products.
- More graphs, data, and detailed visualizations using Evergi consumer data

To learn more about our solutions for emerging CBGs, [request your demo here.](#)

Our social listening dashboard is explicitly created for the emerging wellness industry. Identify the products, brands, and topics consumers are talking about to drive a stronger go-to-market.



Social Listening Methodology

- We collect 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



Consumer Survey Methodology

- Fielded quarterly online with 5,000 US consumers age 21+
- We use third-party panel providers to field the survey with a general population audience, which is census balanced on age, gender, and geography

Can't stop, won't stop. Unless I get sick.

Immunity has morphed from a seasonal concern to a daily wellness practice – a trend that was helped along by COVID.

In the early days of the pandemic, people did everything they could to ward off the then-unknown virus. There was a rush on immunity-boosting supplements, functional beverages, and products with added vitamins and minerals.

Now, as unrestricted gatherings and movement resume, viruses can, and are, spreading like wildfire. Flu and cold cases are already up, rising earlier than we saw in previous years.

This winter we expect the number of colds, flus, COVID, and R.S.V. cases to surge. This has led to more people seeking ways to proactively help their immune systems, instead of waiting for a case of the flu to do it for them.

What can the average consumer do to maintain their daily health?



Immunity, power to the body



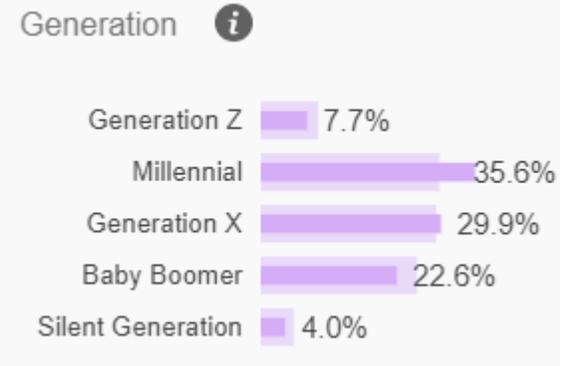
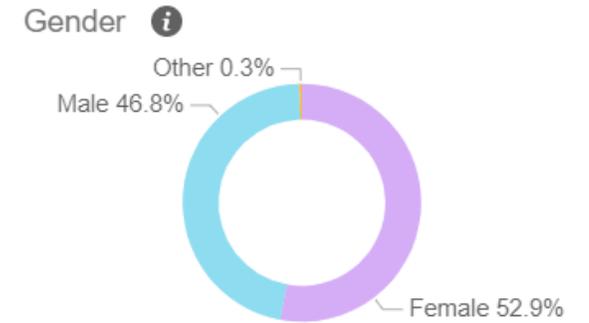
Demographics show Immunity is a universal need

The need for immune system support spans income, household composition, and generation. It's not something for the uber trendy, its appeal resonates across consumer segments to anyone who cares about their full-body health.

It is old science at this point that when the body gets sick, it's because the immune system is compromised, and there are products you can use to help bolster your immunity.

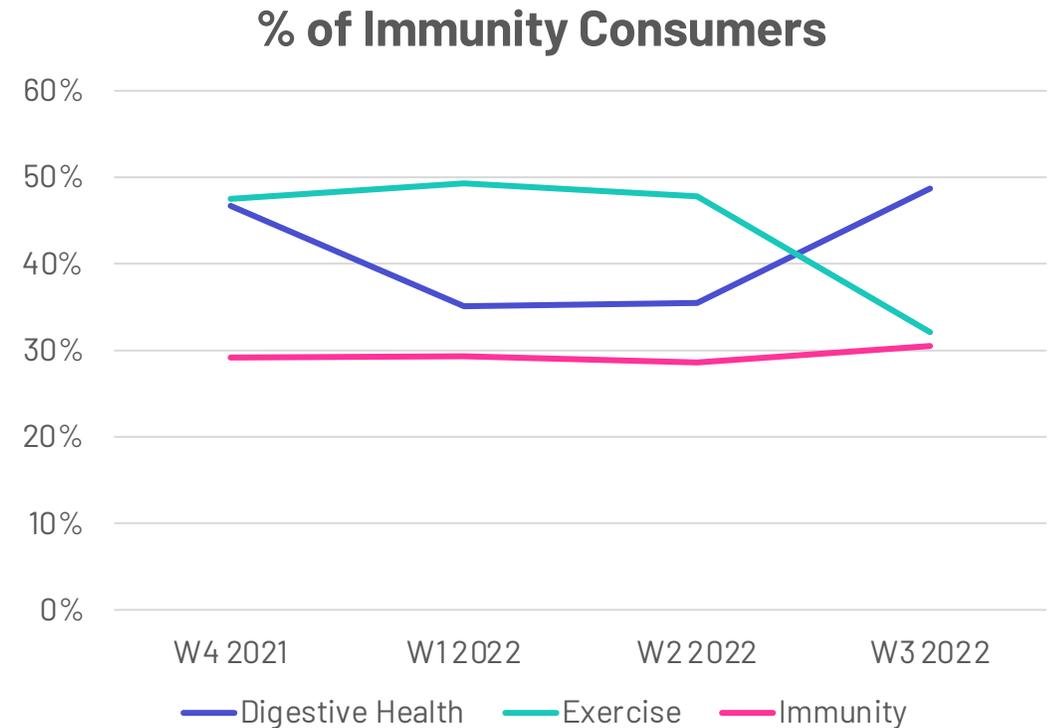
Immunity products are easily accessible to all, and range from pills, gummies, and drink mixes found at the corner pharmacy, to fancy fortified juices and tonics sold alongside bottled water.

The Immunity Consumer



Immunity Need State trends suggest it's a consistent, not a seasonal need

- Over the past year, we've seen people cling to the Immunity need state, despite the decreasing concern for COVID.
- The Immunity need state stays steady when compared to more volatile ones like Digestive Health or Exercise, and surprisingly is not seasonally driven.
- Over half of immunity consumers are more likely to try to increase their immunity with alternative medicine and are looking for immunity boosting claims on the food and beverage products they purchase.



Vitamins top the list of ingredients sought for Immunity, while more niche herbs, botanicals and minerals suggest consumers are using these functional ingredients for “medicinal” purpose

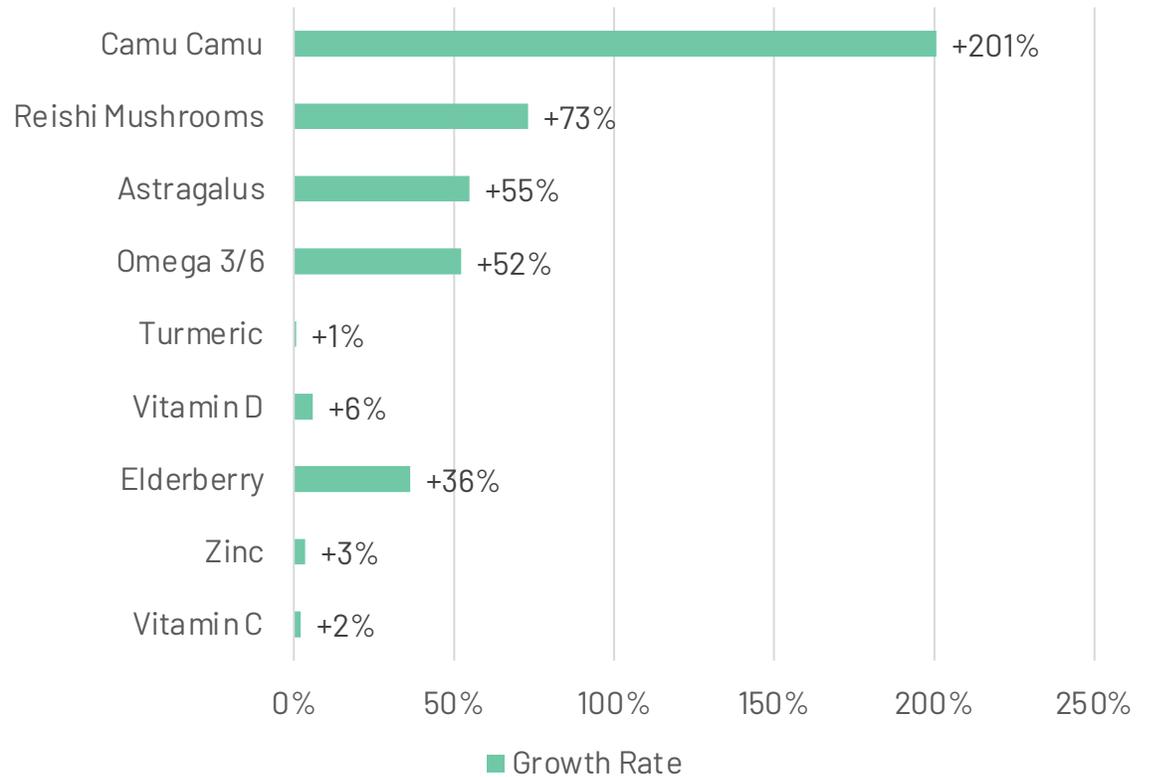
- Tried and true favorites like Vitamin C and Zinc rise to the top, not surprisingly, but alternative and herbal ingredients are also on the radar, including turmeric, ginger, and elderberry.
- Lesser-known supplement ingredients like the camu camu and astragalus are beginning to appear in immunity products, bringing alternative medicine more mainstream.
- Omega-3, often associated with heart health, is now linked to improved immunity. This may contribute to the over-indexing purchases among immunity consumers.
- Over 50% of people believe that functional foods is medicine, and immunity boosting ingredients can help influence purchasing decisions.



Evergi Social Listening among immunity consumers shows consistent chatter on immunity-boosting ingredients

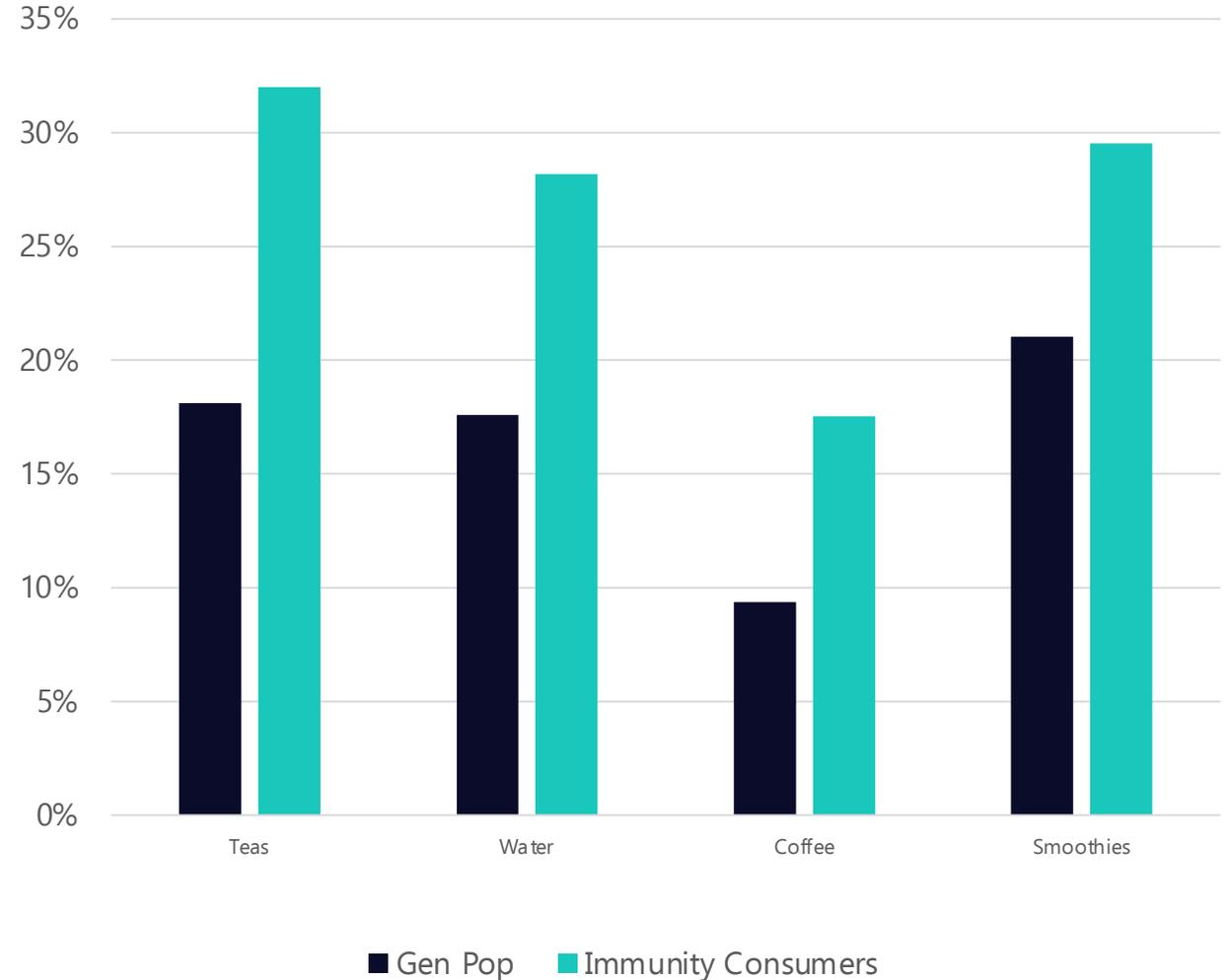
- Hashtag-based chatter on social media platforms has held steady over the past 6 months, supporting the continued interest in the immunity need state.
- Omega-3 is growing as a topic among immunity consumers-- up 52% over the past 6 months -- as studies continue to explore its benefits.
- Despite conflicting claims over the efficacy of elderberry, it continues to grow in social media posts (up 36%).
- These conversations help support the view that immunity consumers are actively searching for ways to better their wellness.

Ingredient Growth Rate on Social Media



Innovation for the immunity conscious consumer should start with things they are already purchasing

- Teas are the top over-indexing beverages bought among consumers seeking immunity products.
- Daily coffee consumption offers another opportunity to add immunity boosting ingredients.
- Premium smoothies and juices, which are naturally high in vitamins, are an easy and approachable vehicle.



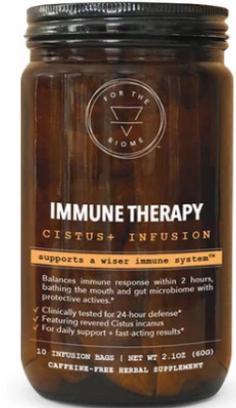
With all the great ingredients out there, how are they being used in beverages today?

Coffee and Tea with Immunity Benefits

Yes, even everyone’s favorite morning cuppas are being infused with immunity boosters.

Whether you wake up with coffee or tea, hot or cold, brands are helping you start your day with a boost to your system.

Immunity benefits are even being added to things like honey, to add an extra layer of protection to your beverage. Shown here are honey sticks from Bizi, who offer vitamin infused honey.



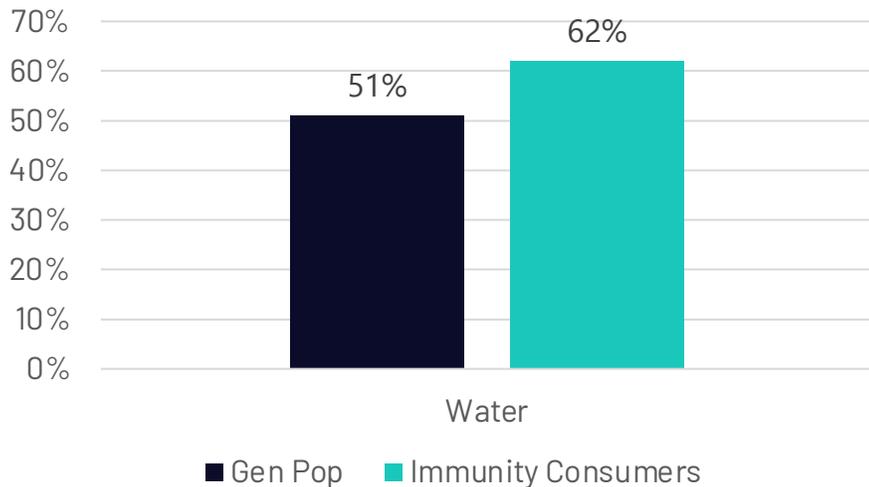
Amasu	Happy Being	For the Biome
<p>Amasu Immunity coffee is blended with a 750-year-old Chinese immunity-boosting formula containing astragalus, atractylodes, and siler root.</p>	<p>Bottled white teas that include immunity-boosting ingredients like pterostilbene, egcg, elderberry, vitamin D, and turmeric. Comes in three flavors, blueberry, cucumber mint, and peach rose.</p>	<p>Herbal tea bags that claim to improve your immune system within two hours. Herbal tea blend includes cistus incanus, rosehips, sumac, black currant, chaga, and ginger.</p>

Immunity waters offer more than just hydration

Just when you thought water couldn't be better. Brands are adding immunity-boosting benefits to water, so you can get hydrated while protecting yourself against a cold. And there are options for both sparkling and still water.



Have purchased in the past 3 months



Flow	Smartwater+	Tru
Flow now offers immunity-support spring water with vitamin C and zinc. Comes in three flavors, elderberry, cherry, and citrus, with zero sugar and environmentally friendlier cardboard packaging.	Everyone's favorite bottled water now offers a support line to help keep you hydrated, and your immune system supported. Each bottle contains added zinc and is flavored with black currant and blueberry.	Tru makes a line of functional sparkling waters to target different wellness needs. The Tru Defend is an immunity blend with echinacea, turmeric, black pepper, ginger, cayenne, and vitamin C.

See what's next in innovative, emerging CPGs with user-friendly data on:



Conversations

Listen in on the latest trends.

Our social listening dashboard is created specifically for the emerging wellness industry. Hone in on the products, ingredients, and topics consumers are talking about to drive new product ideation.

These dimensions are all lined up with our survey data to ensure you get a complete picture of what's next.



Consumers

Driven by need states, enhanced with social.

Our consumer insights are created for Innovation and Marketing teams - driven by the need states consumers aim to achieve.

With in-depth survey data integrated with social media, users can filter and get answers on:

- Consumer Demographics
- Consumer Attitudes and Behaviors on Diet, Shopping, Exercise, and more
- Brand Affinities
- Usage and Interest on 100 Products and Functional Ingredients



Snapshots

Take a pulse on your next innovation.

Snapshots give a birds-eye view of the top trends across products, functional ingredients, and need states.

From Plant-Based to Apple Cider Vinegar to Relaxation, each profile helps you get foundational data to get started: top personas, SKUs, brands, demographics, and more.



Innovations

Identify what's next and drive the innovation pipeline

Product Trends

- Map your product distribution versus key competitors.

Product Development Pipeline

- Use robust data to inform your product development strategy.

Product Positioning

- Identify market opportunities with SKU and brand-level data.

To learn more about our solutions for cannabis, [schedule a demo.](#)

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.

Learn more at evergi.com

