

# What's Next in Wellness?

How Need States Drive Consumer Trends

# A little about us and the data you'll see today...

**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.

## About the data

**Evergi** is our new integrated research platform for emerging wellness products.

Our platform integrates:

### **Social-Enhanced Consumer Surveys**

Fielded semi-annually online with 5,000 US consumers age 21+ (the first wave was fielded December 2020)

### **Wellness-Focused Social Listening**

### **Digital Menu Audits of Major Retailers**

### **Expert Research Analysis**

# A little bit about me!



## **Bethany Gomez**

Managing Director @ Brightfield Group

- My background is in quantitative and strategic research, specializing in market research for CPG.
- Before co-founding Brightfield Group, I managed syndicated research of packaged foods, alcohol, tobacco, and more at Euromonitor International.

# An Overview of What's Next

Need States, Ingredients, and Products

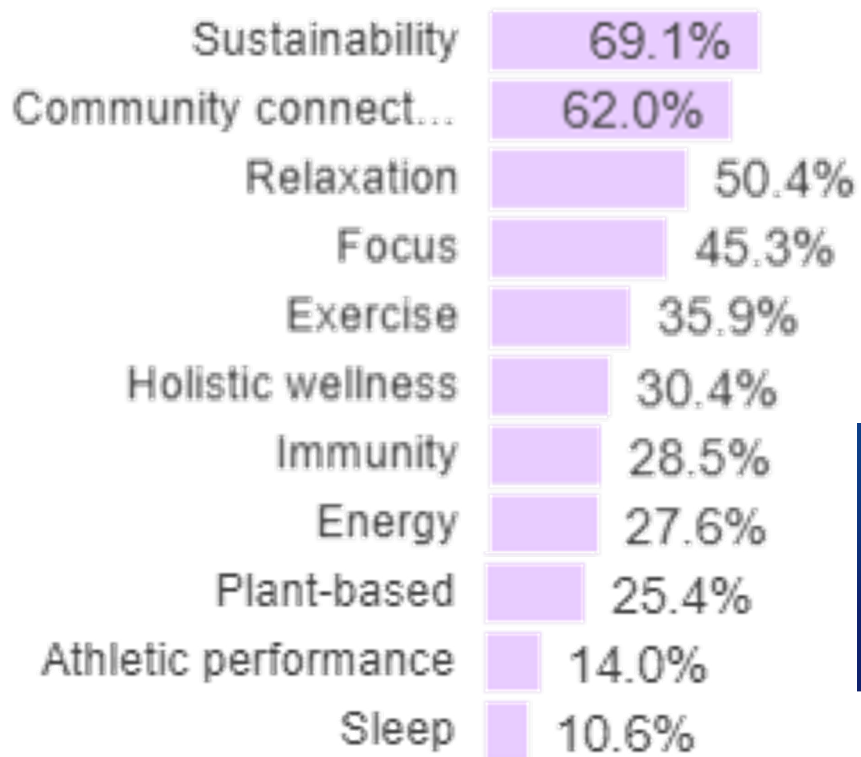


# Need states can influence new product development for big & small companies.

## Sustainability

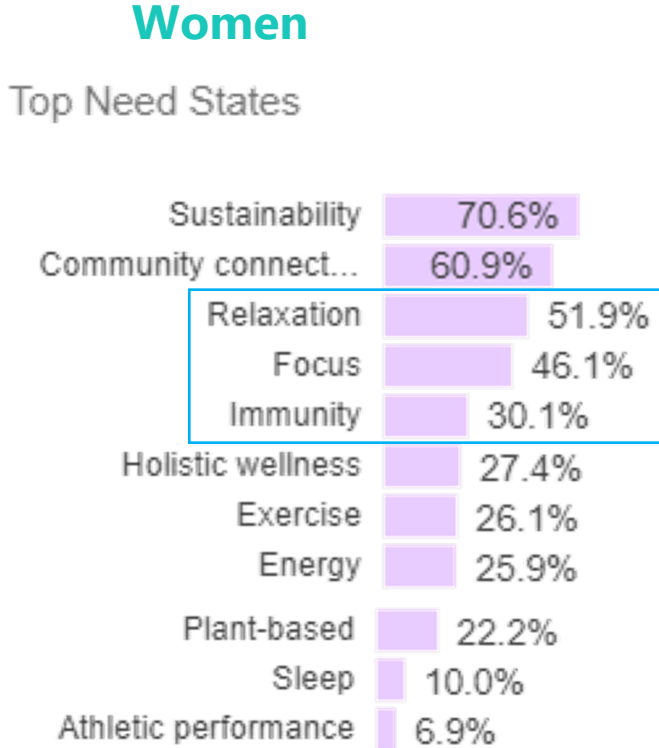
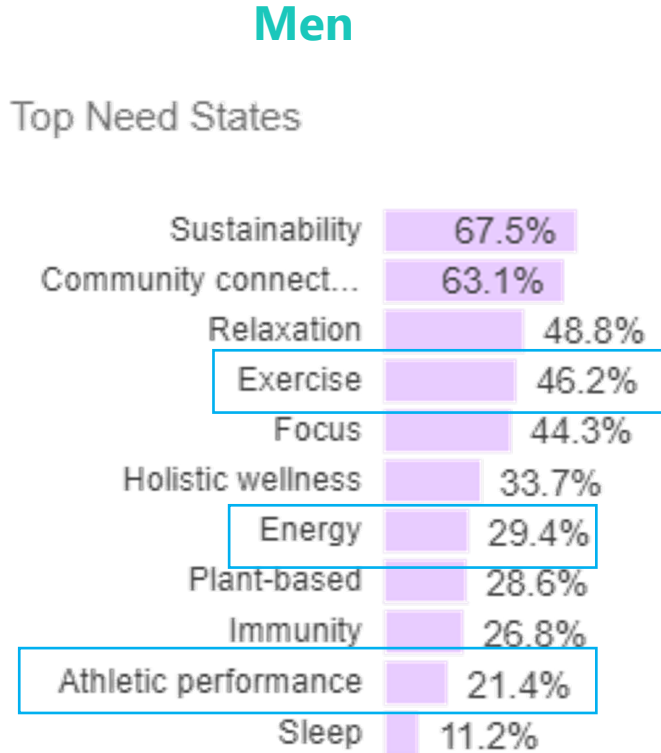
## Community connection

### Top Need States of Americans



Need states are impacted by shopping, nutrition, and even media attitudes and behaviors.

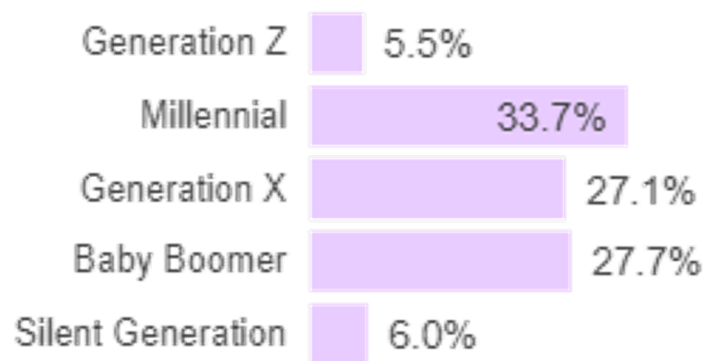
### Top Need States



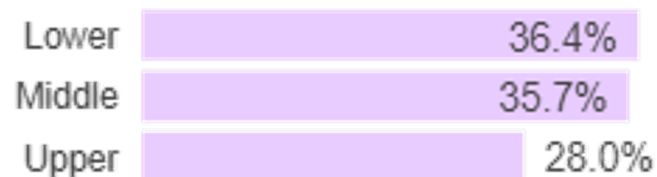
# Need State: Immunity

## Proactive consumers stave off future illness

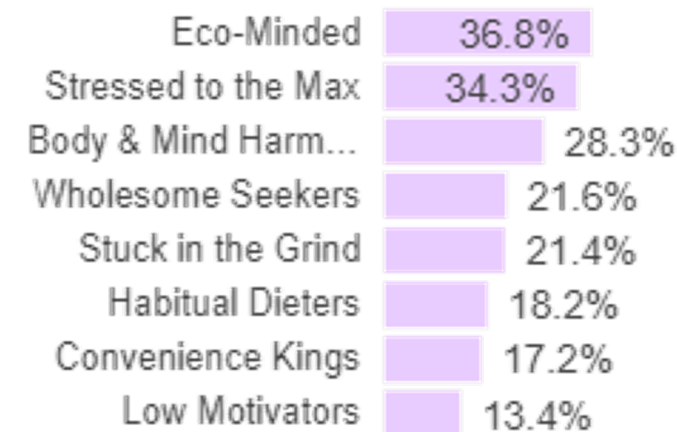
Age



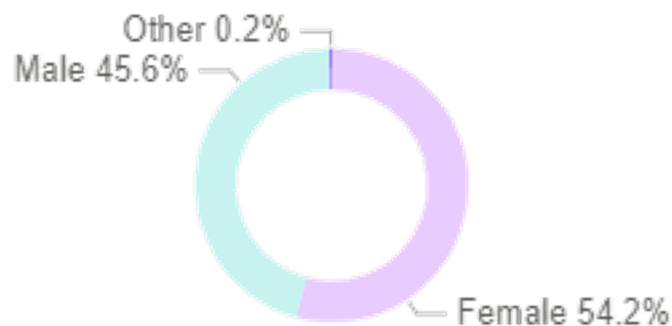
Income Level



Wellness Persona



Gender



# 'Immunity' Topic on Social Media

Consumers mention specific ingredients and products in conversations around immunity.

Products	Share of Voice	Actual Growth
Premium Smoothies (bott...)	28.4%	3.1%
Vegetable Juice	4.0%	3.0%
Honey	7.3%	1.8%
Magnesium	0.2%	1.1%
B-12	3.7%	1.0%
Vitamin D	9.1%	0.7%
Pickled Goods & Olives	0.1%	0.5%
Turmeric	1.3%	0.5%
Ionized / Alkaline Water	0.3%	0.3%
CBD oils/tinctures, capsu...	1.0%	0.3%

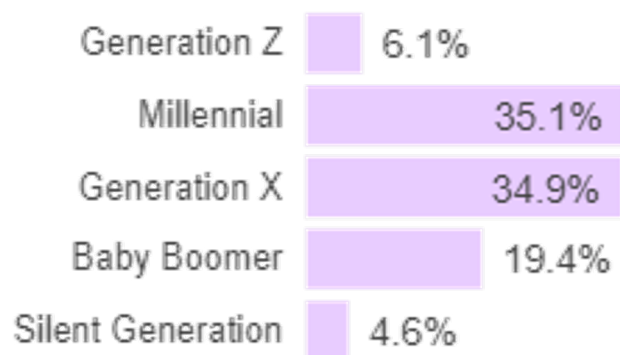




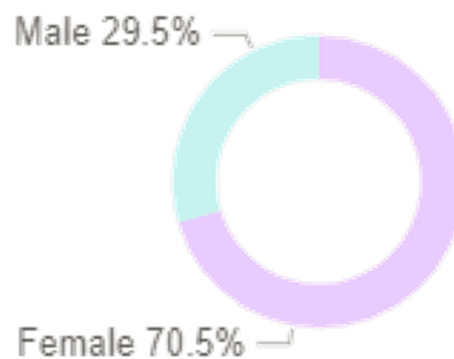
# Ingredient: Collagen

Collagen provides beauty, athletic, and joint health benefits

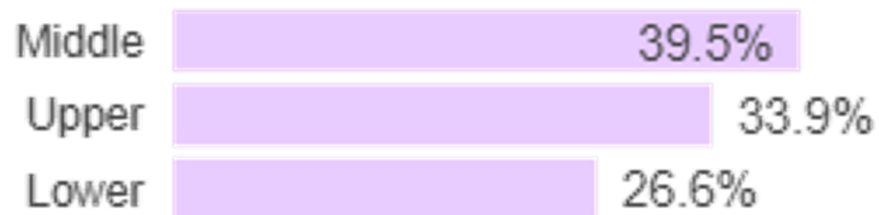
## Age



## Gender



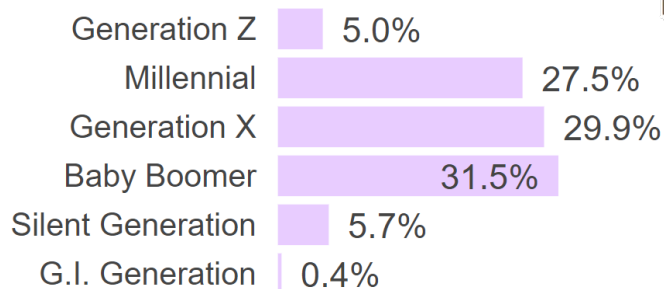
## Income Level



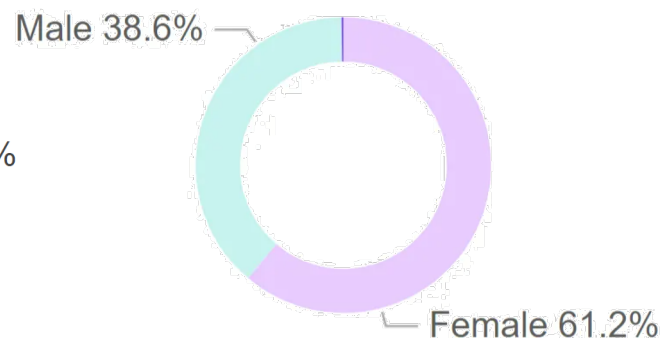
# Product: Alternative Snack Bars

These snack bars can meet consumer dietary needs while emphasizing functional ingredients.

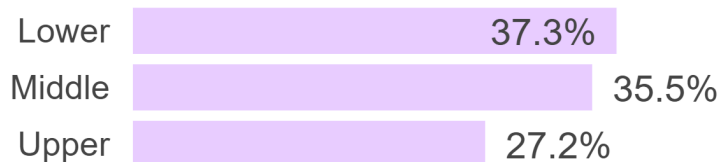
## Age



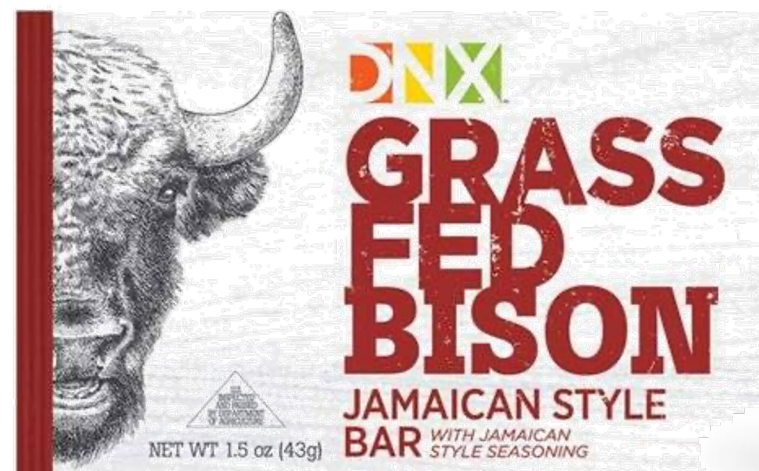
## Gender



## Income Level



Source: Evergi Consumer Survey, December 2020, N = 1190



# Deep Dive into Relaxation

Setting the Stage



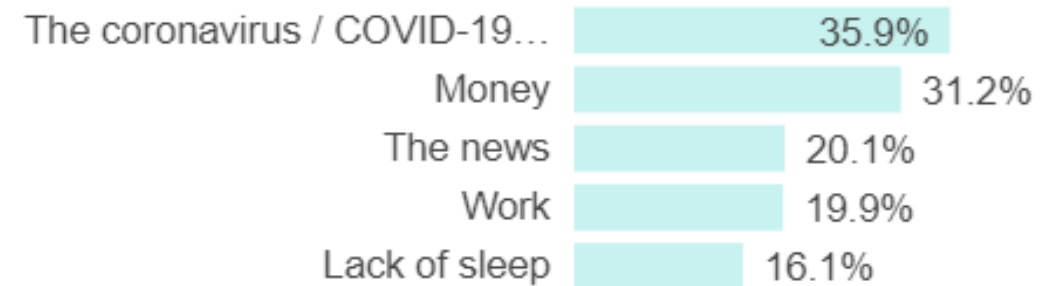
# Americans are stressed!

**56%**

of Americans say they are often anxious and stressed out.

**33%** rated their stress level a 4 or 5 out of 5 for the last week!

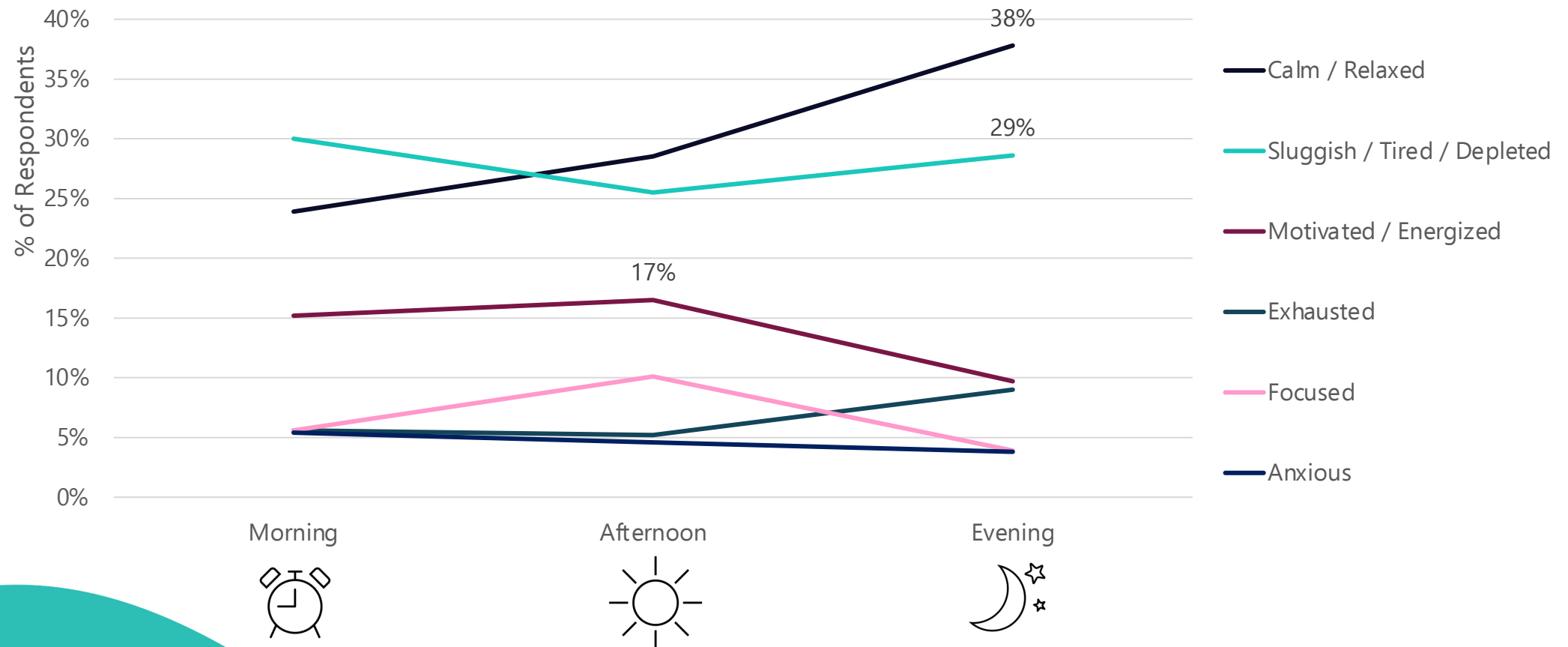
## Top Stressors



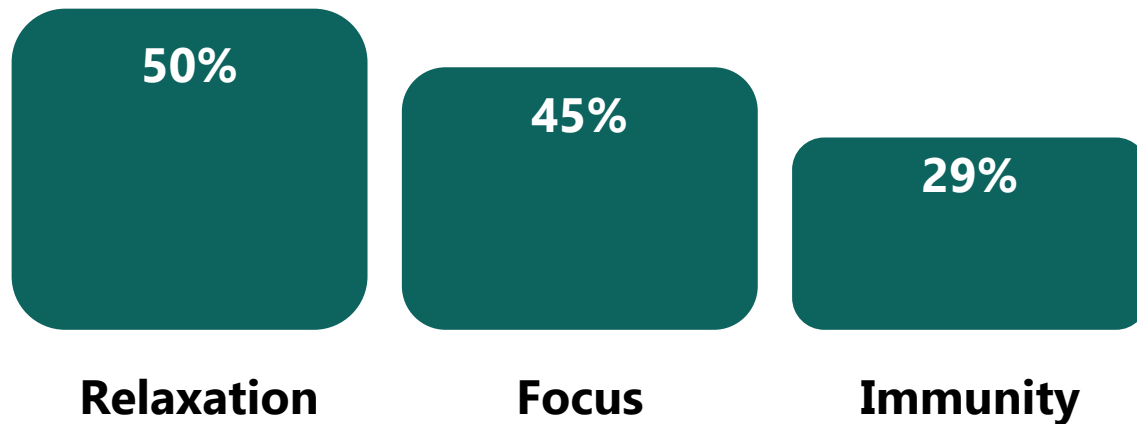
# Their days are filled with fluctuating moods (need states).

## Mood by Time of Day

*How would you describe your mood on most days in the morning / afternoon / evening? Choose one.*



**Relaxation** is a top need state Americans are looking to achieve.



**Persona Highlight**

**Stressed to the Max**

**35%**

of US Consumers


More likely to be **female**

Over-indexes among  
**lower-income**  
consumers


Top need states are  
**focus + relaxation**

# How are these consumers managing stress?

**Stressed to the Max** consumers are managing stress by:

 drinking functional beverages focused on energy, focus, and relaxation.

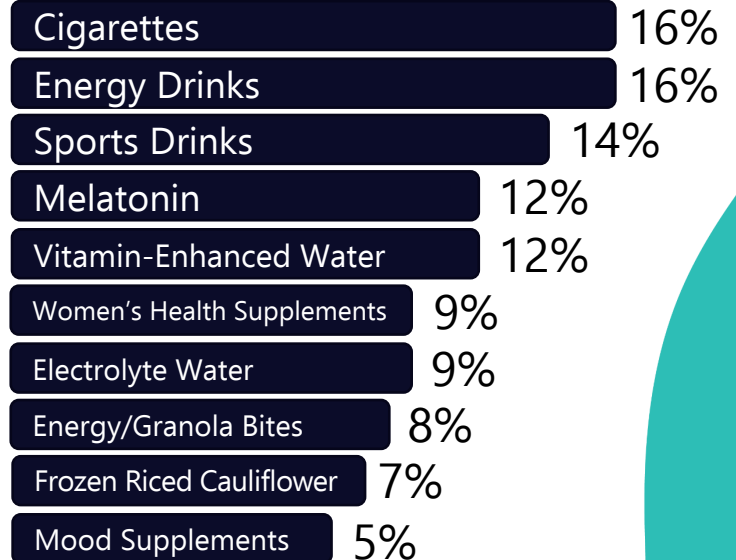
 listening to music or watching TV

 spending time alone or with friends and family



## Over-Indexing Products

% **Stressed to the Max** purchased in last 3 months



# An Opportunity in Relaxation

Relaxation is a key need state for Millennials and Generation X who are busy balancing work with family.

## Stressed to the Max Consumers are...

### Much more likely to agree that:

- Healthy foods are too expensive
- Too busy to cook
- Unmotivated to exercise
- Social media is a source for new brands
- Staying focused is difficult

### And more likely to:

- Buy organic
- Research new health concepts
- Look for health claims around sleep and relaxation
- Shop at C-stores or Online



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By honing in on need states, psychographics, and product usage, brands can get a complete view of emerging consumer segments.

# Products for Relaxation

Beverages, Adaptogens, and more



65%

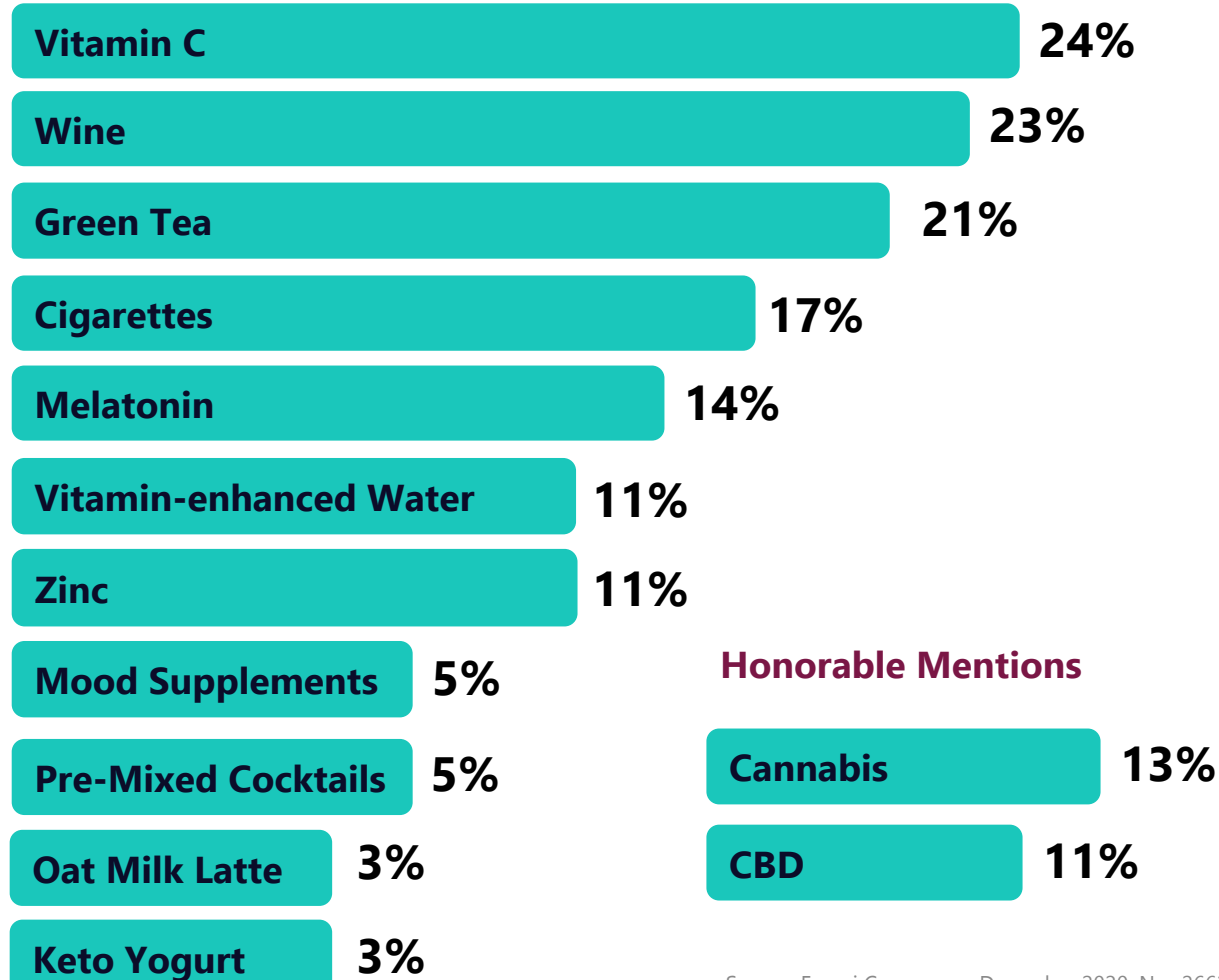
of Americans agree that functional  
foods and beverages can be  
substituted for some medicines



# Functional beverages and supplements make up much of the Relaxation category.

## Products for Consumers Looking to Relax

*% purchased in last 3 months*

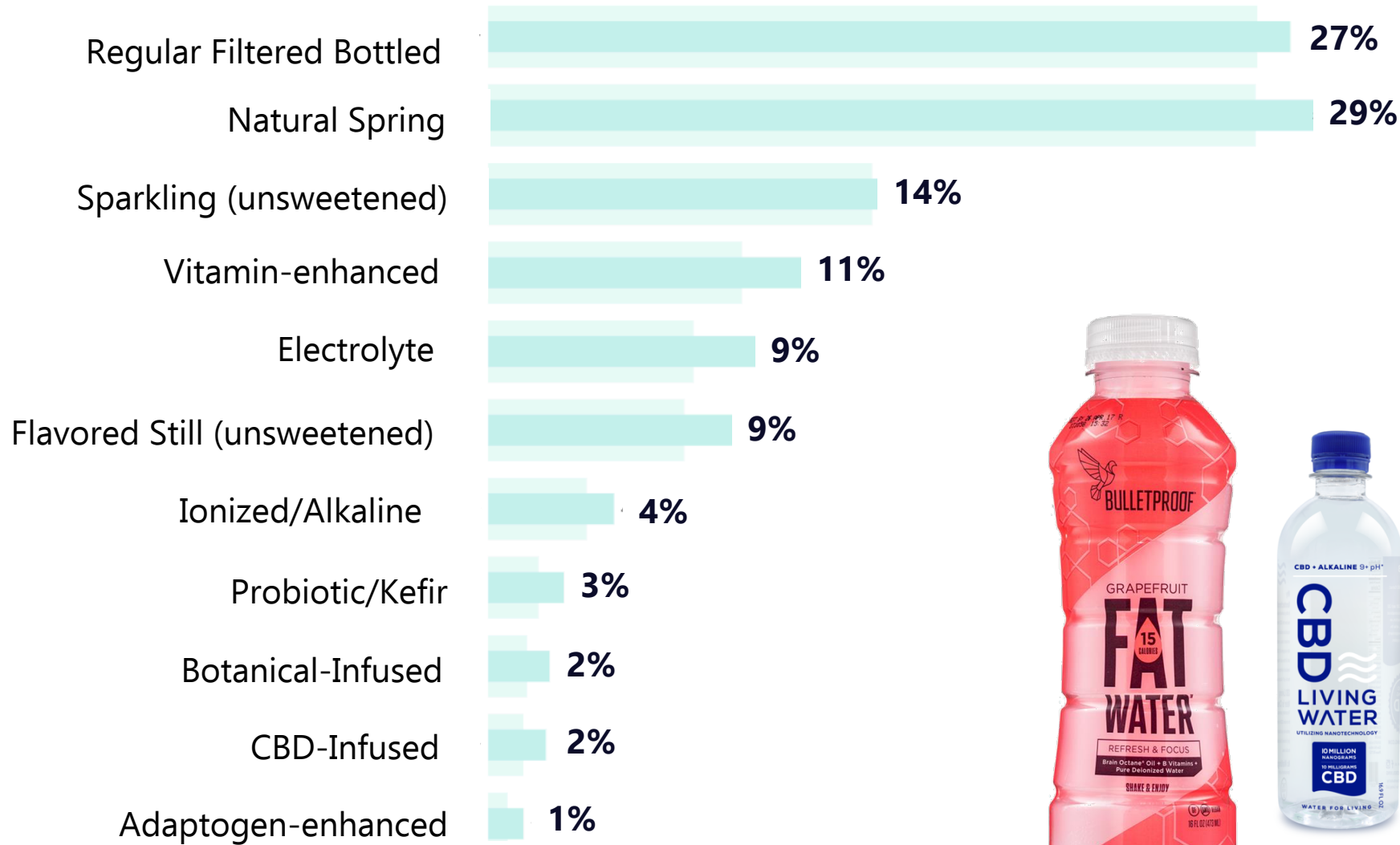


### Honorable Mentions



Source: Evergi Consumers, December 2020, N = 2662 (Consumer who fall in Relaxation Need State)

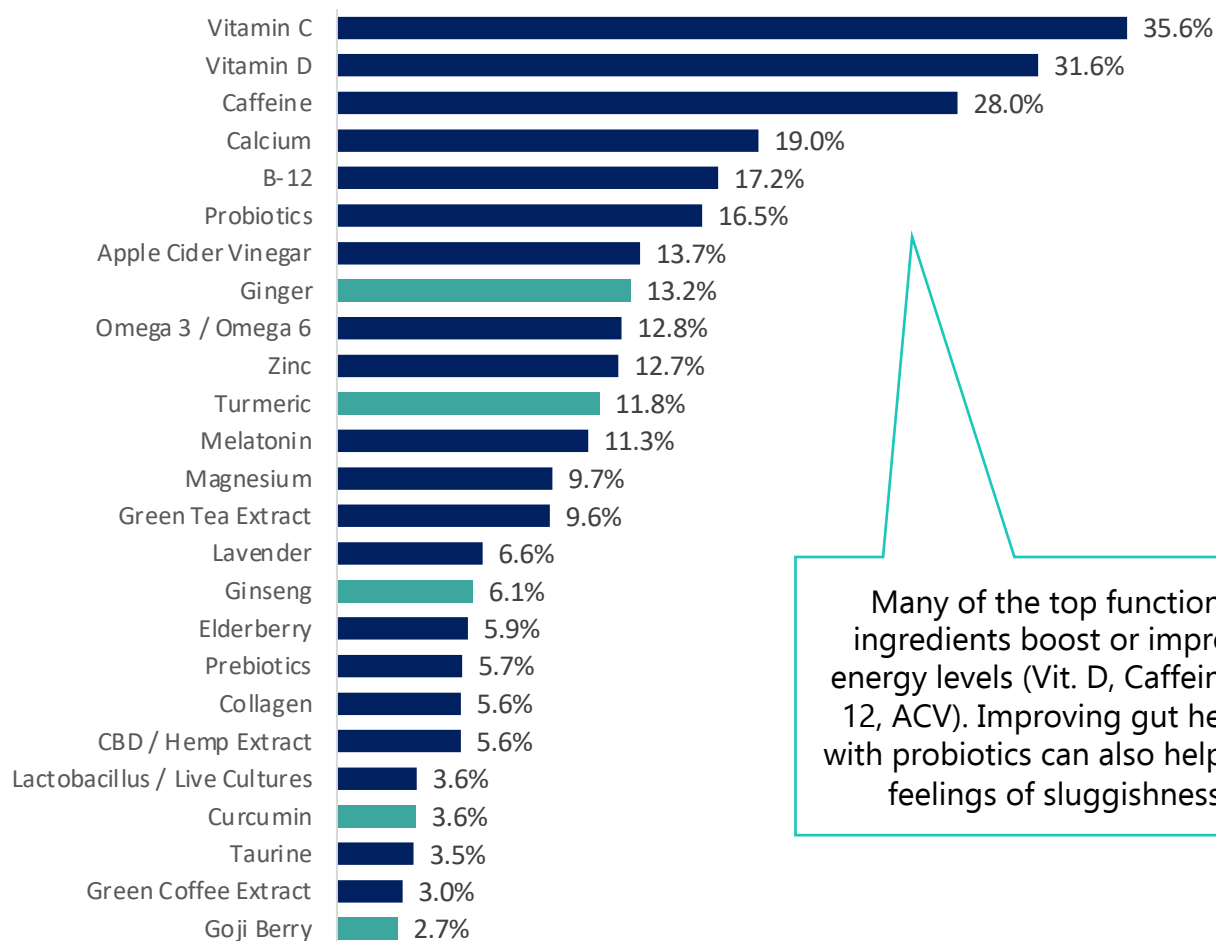
# Functional waters are starting to shake up the larger water category.



# Adaptogens provide opportunity for need state-centric innovation.

## Top 25 Functional Ingredients

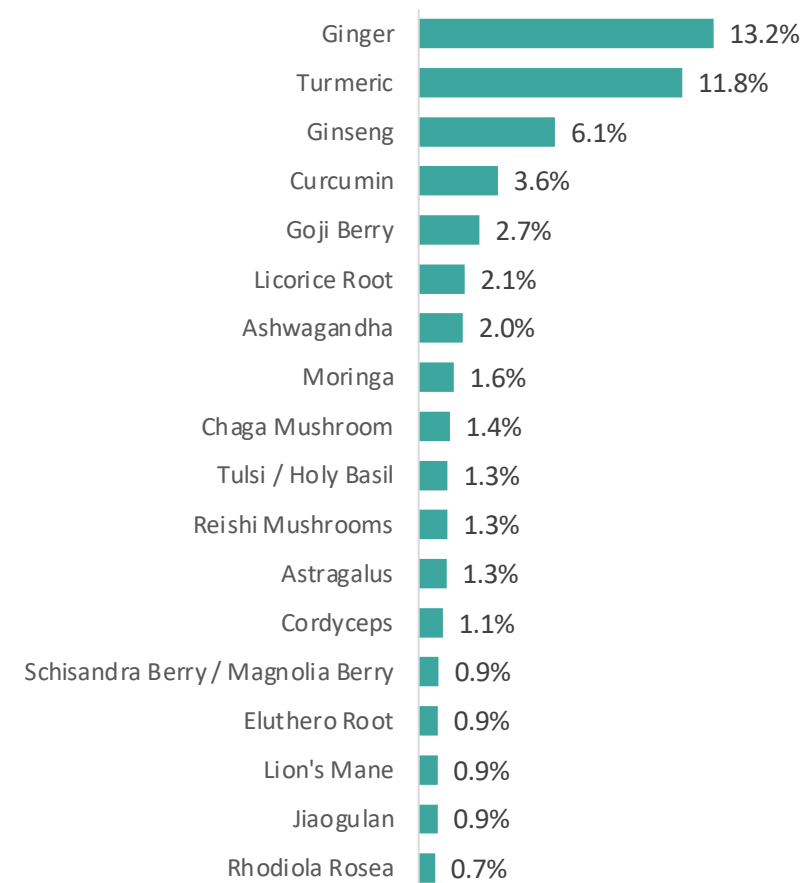
% purchased in last 3 months



Many of the top functional ingredients boost or improve energy levels (Vit. D, Caffeine, B-12, ACV). Improving gut health with probiotics can also help with feelings of sluggishness.

## Top Adaptogens

% purchased in last 3 months



# Emerging adaptogens better align with consumers looking for function in their products.

## Turmeric

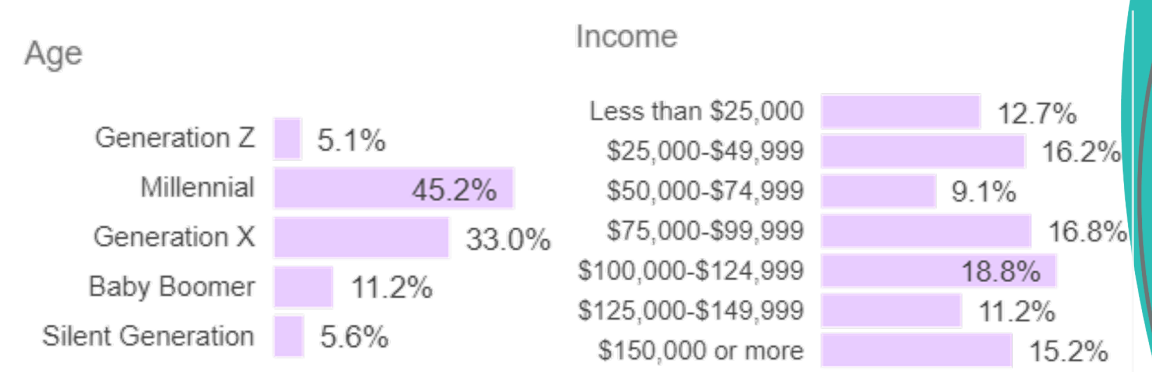
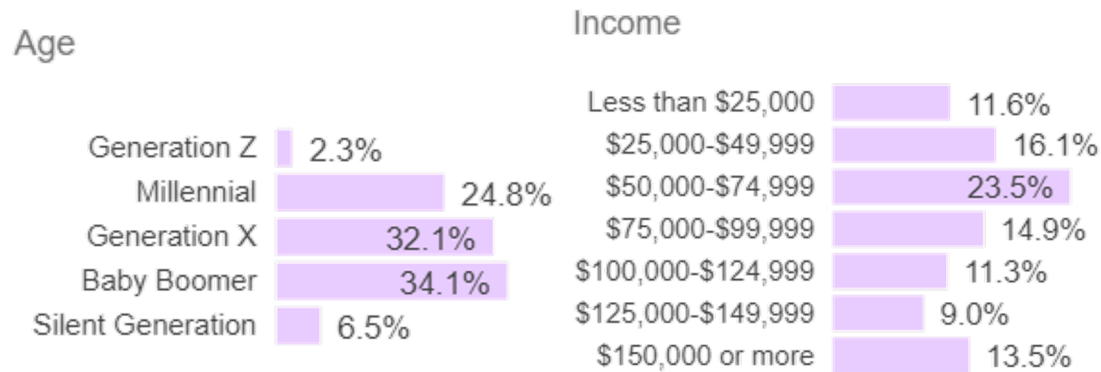


- More established in the market overall (11.8%)
- Over-indexes among Baby Boomers due to its anti-inflammatory benefits

## Goji Berry



- An emerging functional ingredient (2.7%), but is more well-known than other adaptogens
- Over-indexes among Millennials, Gen-Xers, and higher-income consumers

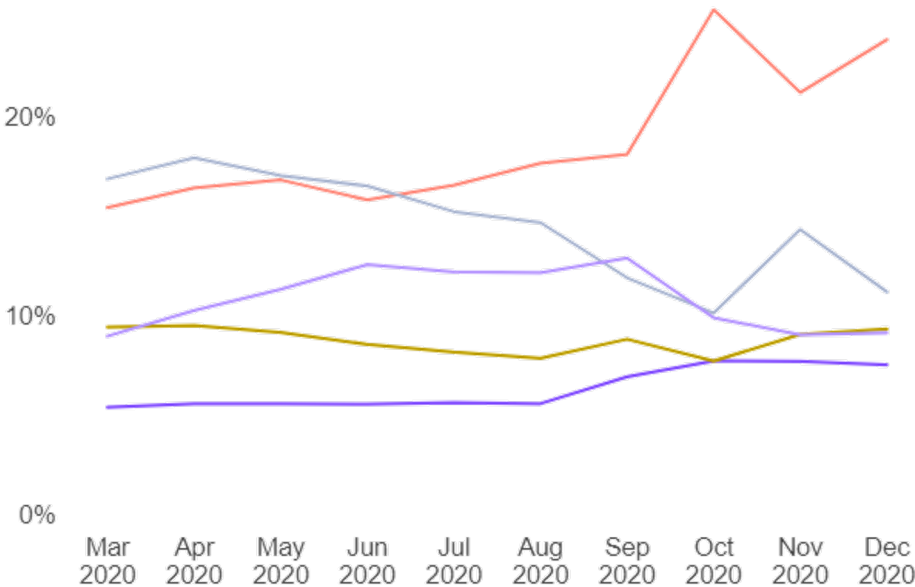


On social media, traditional adaptogens are being challenged by newcomers.

### All Ingredients

Overall Posts by Ingredients

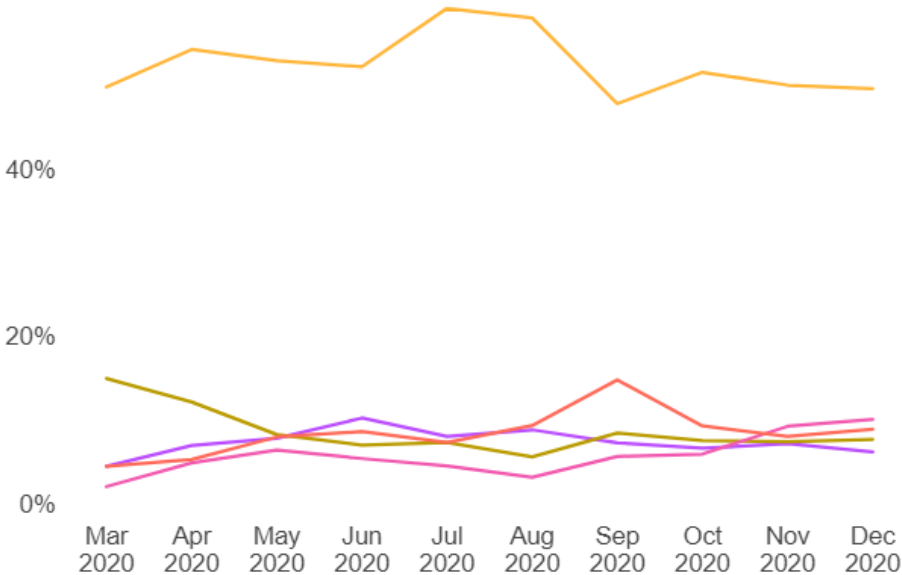
- Highest Volume ○ Highest Growth
- CBD ● Collagen ● Garlic ● Ginger ● Lavender



### Within the "Adaptogens" topic:

Overall Posts by Ingredients

- Highest Volume ○ Highest Growth
- Ashwagandha ● Ginger ● Ginseng ● Tulsi / Holy Basil ● Turmeric



**CBD** is the top trending ingredient in conversations about overall wellness on social media.



# Key Takeaways

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





Emerging functional ingredients and **adaptogens** are being quickly adopted by Millennials in products outside of supplements.



Consumers are starting to look for **healthier alternatives** to address their need states.

**Functional foods and beverages** can be promoted as an easy and tasty way that meets specific consumer needs.



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# Thank you!

For more information, please visit [evergi.co](https://evergi.co).