

Methodology: Primary quantitative research

TOPICS COVERED

- Health benefits explored: **Energy, immunity, digestive health, cognitive health, sleep, weight management, emotional health and beauty**, plus additional emerging benefits.
- **Consumer motivations, needs and behaviors:** Underlying, enduring needs that consumers have; opportune moments to connect with consumers on their health journey.
- **Paths to purchase:** How consumers shop for functional products; expectations of various channels; how to leverage channel strengths and purchase drivers.
- **Inspiration for innovation:** How to innovate and future-proof your brand to align with consumers' evolving expectations, needs and purchase criteria.

METHODOLOGY

National online survey

- July 27 – August 7, 2024
- n=3,416 U.S. adults aged 18–78 (MOE $\pm 1.7\%$ at 95% confidence level)

Readable samples

- Age cohorts: n=396 Gen Z (18-27), n=1,038 Millennials (28-43), n=1,049 Gen X (44-59), n=933 Boomers (60-78)
- Race/ethnicity: n=2,150 Caucasian, n=456 African American, n=458 Hispanic, n=279 Asian/Pacific Islander
- Household: n=1,116 with children <18 in the household
- Hartman Group's World of Health & Wellness Segmentation: n=431 Core consumers, n=788 Inner Mid-Level, n=1,388 Outer Mid-Level, n=809 Periphery
- 8 health benefits: n=258-372 for each benefit. *Some questions have base sizes below n=100 which are less reliable and should be used with caution.

READING THE CHARTS

Segment colors used in charts and to indicate over-indexing

Main color used



Total

Age Cohorts



Gen Z



Millennials



Gen X



Boomers

World of Organic Segments



Core



Inner Mid-Level



Outer Mid-Level



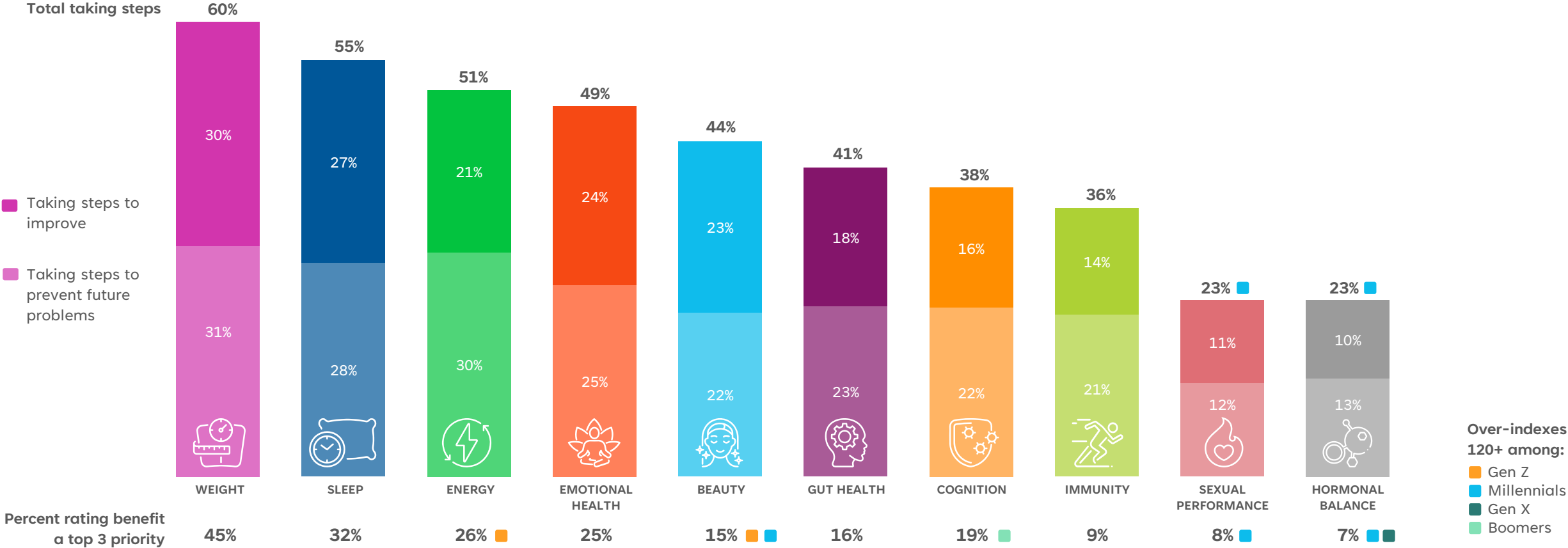
Periphery

Age cohorts and segments are *indexed* to Total.

Weight, sleep, energy and emotional management are top priorities for consumers

Consumers taking steps to improve/prevent future problems

Among Total

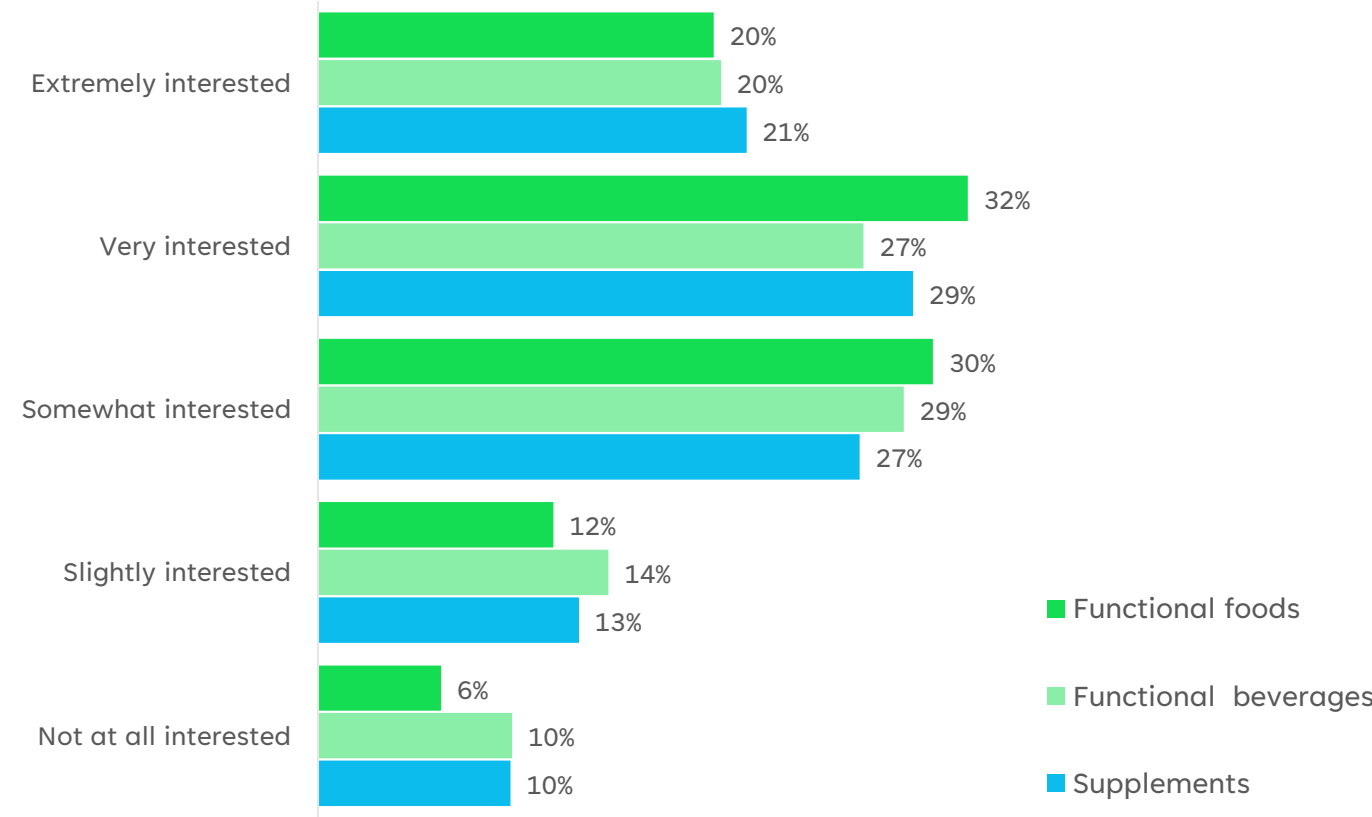


B2. Now please consider your personal priorities and the steps you may take to achieve them. How have you approached each of these objectives during the PAST 12 MONTHS? Base: Total n=3,416; Gen Z n=396, Millennials n=1038, Gen X n=1049, Boomers n=933; Core consumers n=431, Inner Mid-Level n=788, Outer Mid-Level n=1388, Periphery n=809. *Core over-indexes on all conditions. B4. All things considered, which of these health objectives do you care about the MOST? Please rank the top-3 that are most important to you. Base: Among B2=Currently/recently taking steps to improve; Recently taking steps to prevent future problems for at least one objective. Total n=3,028; Gen Z n=366, Millennials n=940, Gen X n=925, Boomers n=797; Core consumers n=404, Inner Mid-Level n=716, Outer Mid-Level n=1,248, Periphery n=660.

In practice, consumers are open to experimenting with functional products and supplements

Interest in finding new brands to support BENEFIT

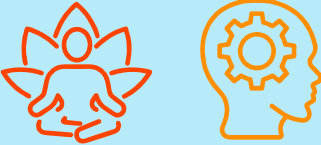
Average among consumers taking steps for 8 benefit spaces



BD8. How interested are you in finding...? Base: B3=Supports health objectives using Foods or beverages known to be naturally helpful, Functional foods or beverages with specific claims to support this objective, Vitamins, minerals or dietary supplements specifically recommended for this, Assigned to benefit n=2,330.

Benefit areas consumers are extremely interested in finding new...
Among consumers taking steps for each benefit space

Functional foods



Functional beverages



Supplements



Along with sleep, emotional health is one of the hardest aspects of health for consumers to manage

Consumers tend to prioritize lifestyle factors and behaviors for managing emotional health, both directly and by extension through their roles in supporting other interconnected dimensions of health. Regular exercise/physical activity and getting good sleep are seen as foundational. Calming and grounding practices such as meditation, breathing exercises, spending time in nature, disconnecting from technology, avoiding stressful contexts and connecting with friends, family and pets can help improve mood and promote relaxation.

While consumers intuitively sense that diet and nutrition can influence emotional health, the connection is less clear than with other aspects of health. These connections have become somewhat clearer in recent years as functional foods, beverages and supplements have emerged touting the stress-supporting and calming benefits of ingredients such as botanicals, adaptogens, medicinal mushrooms and THC/CBD.

Prescription medication continues to be an important tool, particularly for depression, but consumers aspire toward balancing or replacing it with more “natural” approaches when possible. Psychedelics, for example, represent the potential for replacing pharmaceutical approaches.

Those taking steps to improve/prevent future problems



56% Female
(110)



32% Millennial
(112)



29% Kids at home
(115)



72% Caucasian (96)
18% African American (129)
17% Hispanic (109)



20% Under \$35K
(108)



34% Large city (112)

Of those addressing EMOTIONAL HEALTH, they are doing so to...

48% take steps to improve

52% prevent future problems

Products or services used in the PAST 12 MONTHS to support EMOTIONAL HEALTH



Foods or beverages

20%



Functional foods or beverages

15%



Vitamins/supplements

21%



Over-the-counter medication

6%



Prescription medication

18%

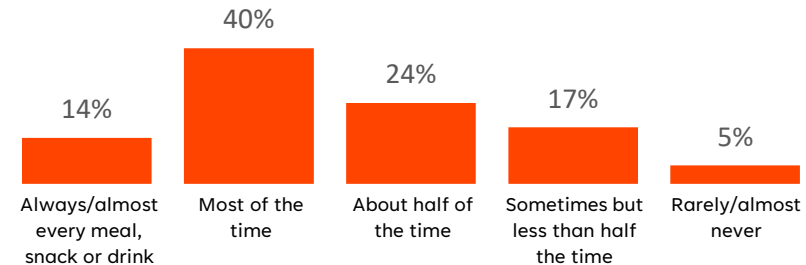


Treatment at clinic

6%

Of those using food and beverage solutions and/or supplements for EMOTIONAL HEALTH

Frequency of choosing foods and beverages specifically to support EMOTIONAL HEALTH





COGNITION: FUNCTIONAL F&B SPOTLIGHT

21% are using functional foods and beverages to support COGNITION

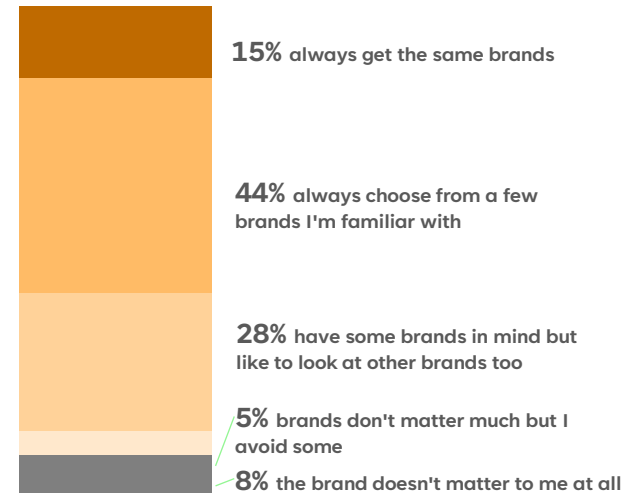
On average, functional foods or beverages with specific claims to support COGNITION are used

1.6 days/week

Functional F&B most commonly used for COGNITION (Among those taking steps to improve/preventing future problems)

Ready-to-drink energy drink	33%
Hot tea	28%
Ready-to-drink enhanced water	25%
Ready-to-drink tea	22%
Drink-sized packaged juice/smoothie/shake	19%
Snack bars	18%
Chocolate or other candy bar	16%
Instant powdered drink mix	15%
Shot-sized packaged juice/smoothie/shake	14%
Snack mix	13%

Influence of brand (Among those taking steps to improve/preventing future problems)



62% are very/extremely interested in finding new FUNCTIONAL FOODS to support COGNITION

55% are very/extremely interested in finding new FUNCTIONAL BEVERAGES to support COGNITION

When choosing a new food or beverage for COGNITION what is especially important to you? (Among those taking steps to improve/preventing future problems)

