

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 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

An Overview of What's Next

How we got to a need-state centric approach

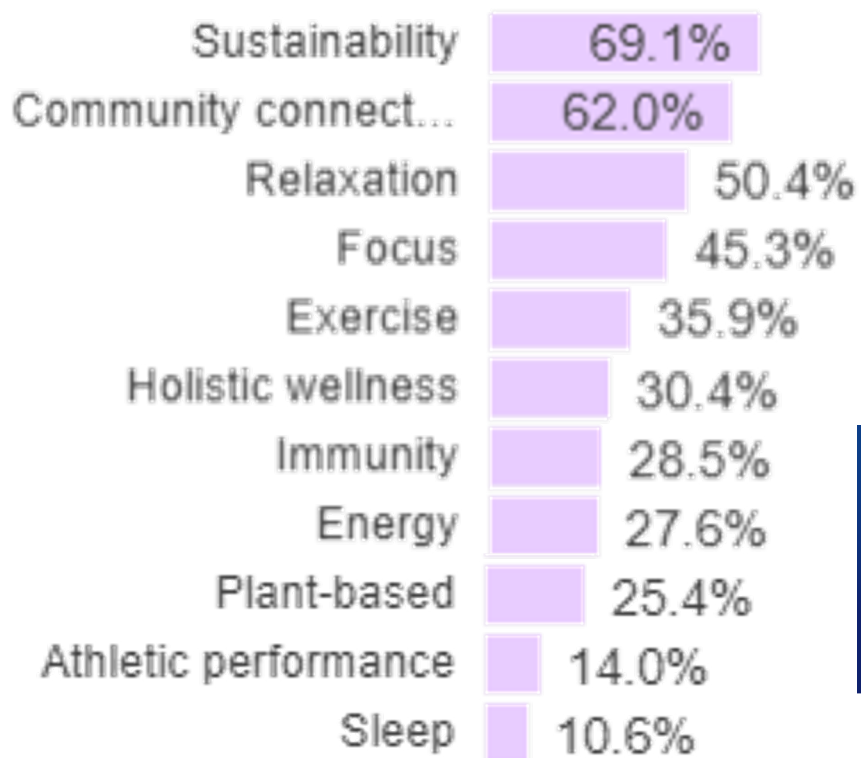


Need states can influence new product development for big & small companies.

Sustainability

Community connection

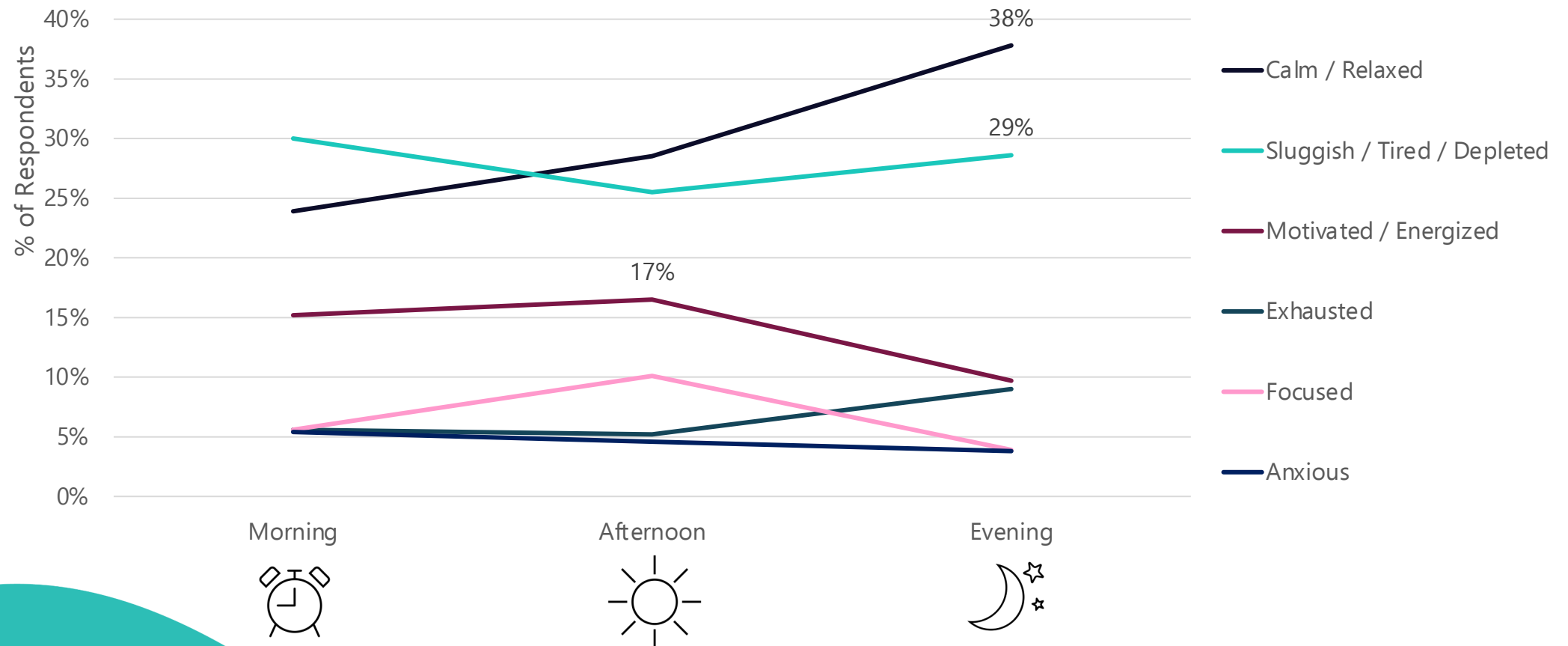
Top Need States of Americans



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.



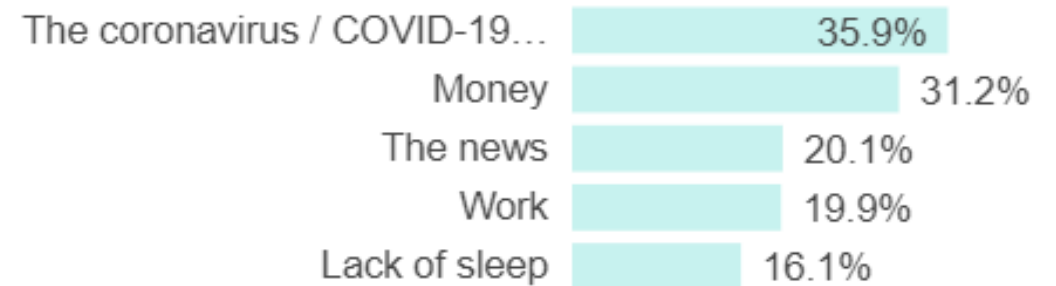
Americans are stressed!

56%

of Americans say they are often
anxious and stressed out.

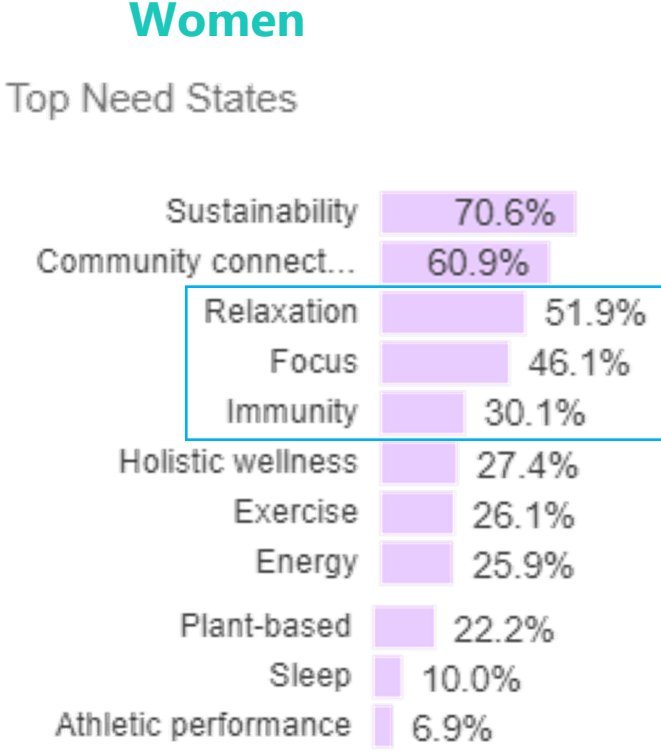
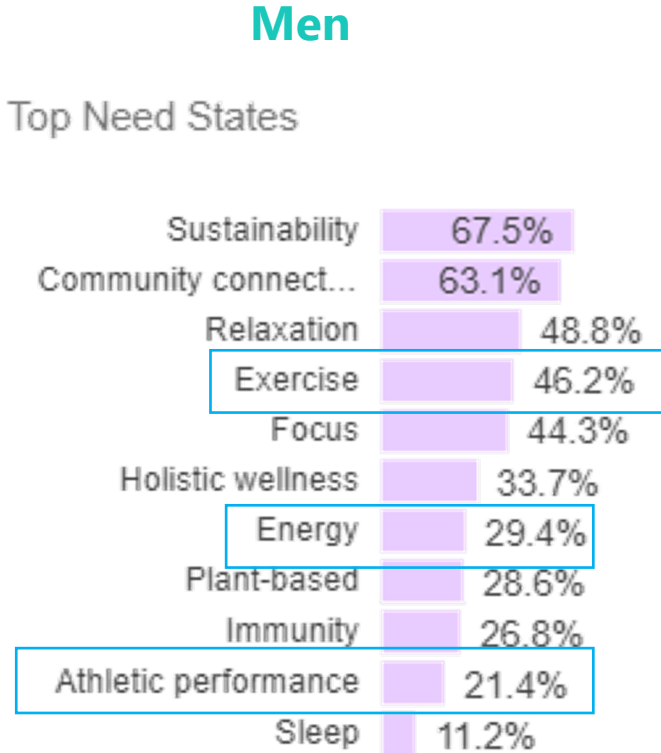
33% rated their stress level a 4 or 5 out of 5 for the last
week!

Top Stressors



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

Top Need States



Source: Evergi Consumer Survey, December 2020, N = 5042

Need States: Immunity and Relaxation

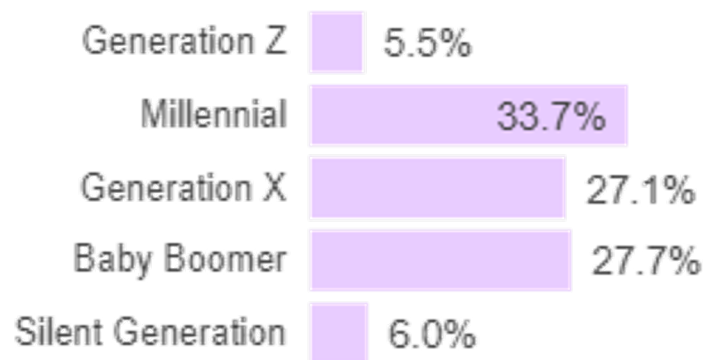


Need State: Immunity

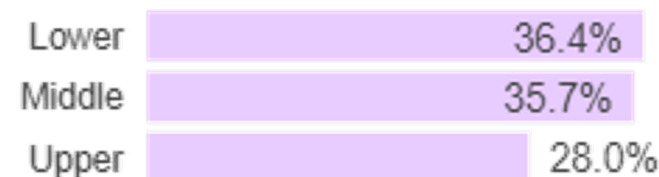
Strong growth in immunity need state due to the ongoing coronavirus pandemic. Shoppers of all ages including older consumers are actively seeking out ways to reduce their chance of illness in a holistic manner by:

- Looking for immunity-boosting ingredients such as **vitamins C and D and elderberry**
- Engaging in regular exercise
- **Spending time in nature** to recharge mind and body

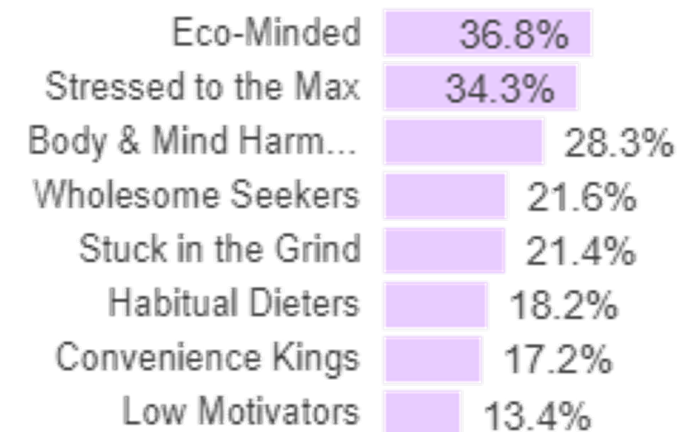
Age



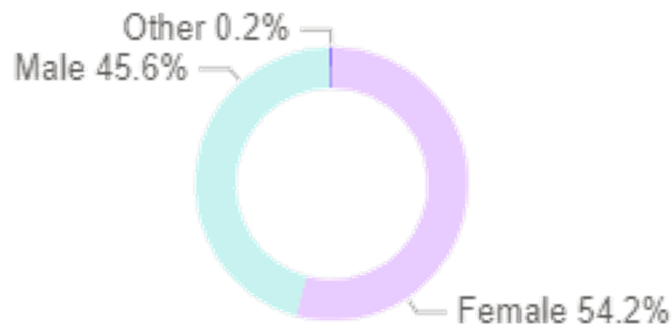
Income Level



Wellness Persona



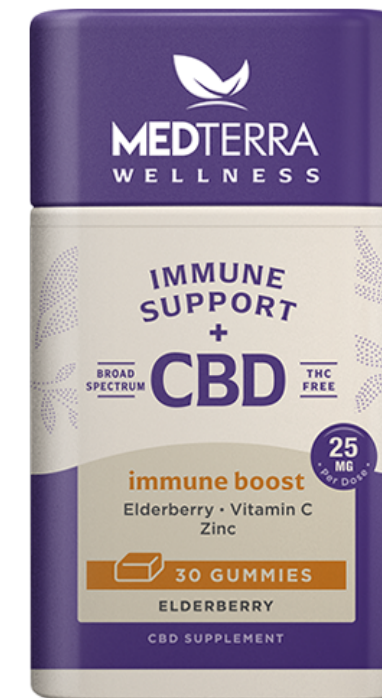
Gender



'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%

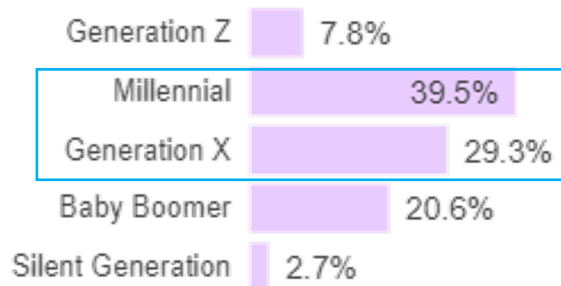


Relaxation: Busy consumers relieve stress & anxiety

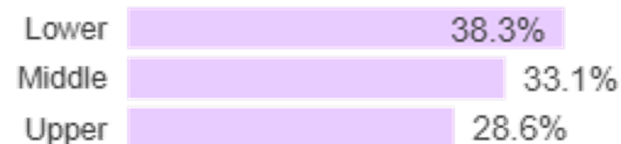
Relaxation is a key need state for **Millennials and Generation X** who are busy balancing work with family. Emergence of functional beverages incorporating **adaptogens and CBD** to help consumers reduce anxiety. Stressed to the Max consumers are managing stress by:

- Drinking **wine and hard seltzers** as well as using CBD and melatonin
- **Listening to music** or watching TV
- Spending time alone or with friends and family

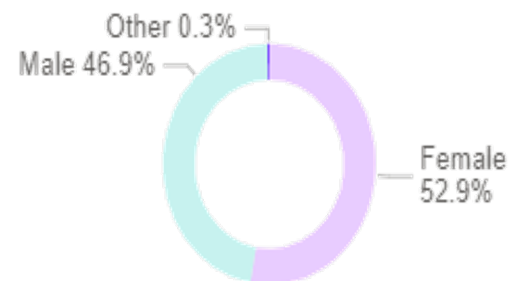
Age



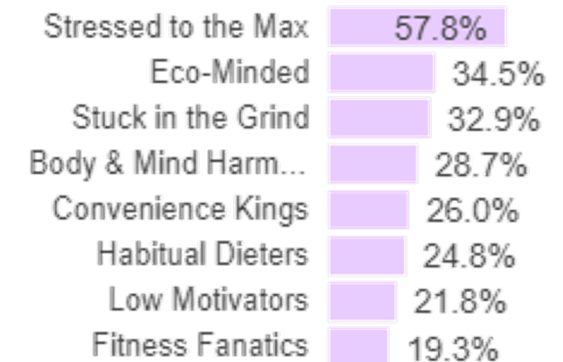
Income Level



Gender



Wellness Persona

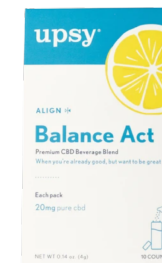


Relaxation: wine, CBD oils & gummies, sparkling water

Top Product Topics

Products	Share of Voice
Wine	61.0%
Premium Smoothies (bott...)	8.8%
CBD oils/tinctures, capsu...	7.0%
Spirits / Hard Alcohol	4.6%
Nut Milk (almond, macad...)	2.5%
Sparkling Water (unswee...)	2.2%
Beer	1.5%
Apple Cider Vinegar	1.3%
Meal Replacement Bars	1.1%
Greek Yogurt	0.8%
CBD-infused Sparkling W...	0.8%
Honey	0.7%
Oat Milk	0.7%
Regular Filtered Bottled ...	0.7%

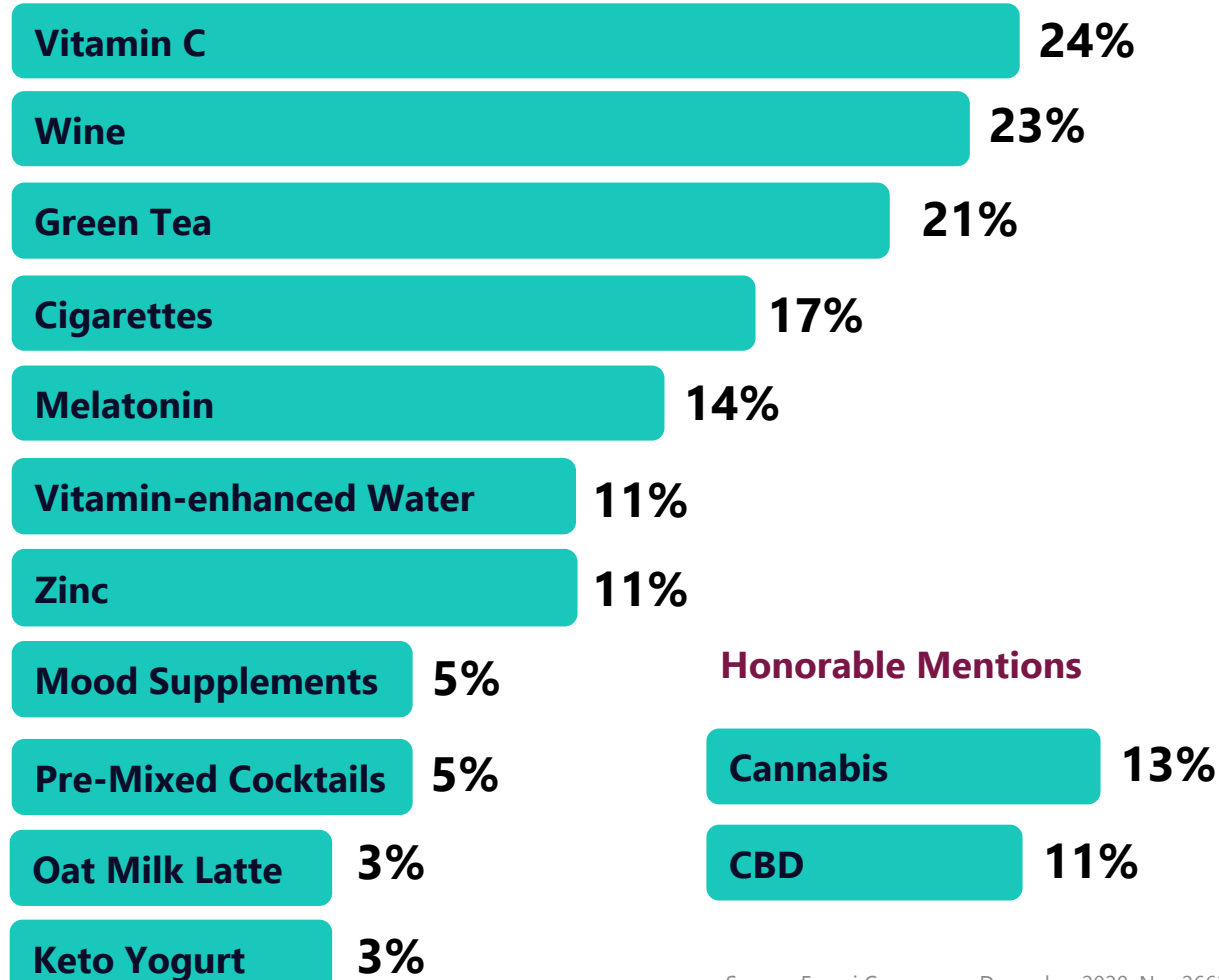
CBD products and functional sparkling waters (with the addition of L-Theanine, CBD, magnesium) contribute to relaxation rituals



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)

How to innovate for need states

Focus on Relaxation and Immunity

Identify your consumers' need states

Example: Stressed to the max consumers

Persona Highlight
Stressed to the Max

35%

of US Consumers

More likely to be **female**

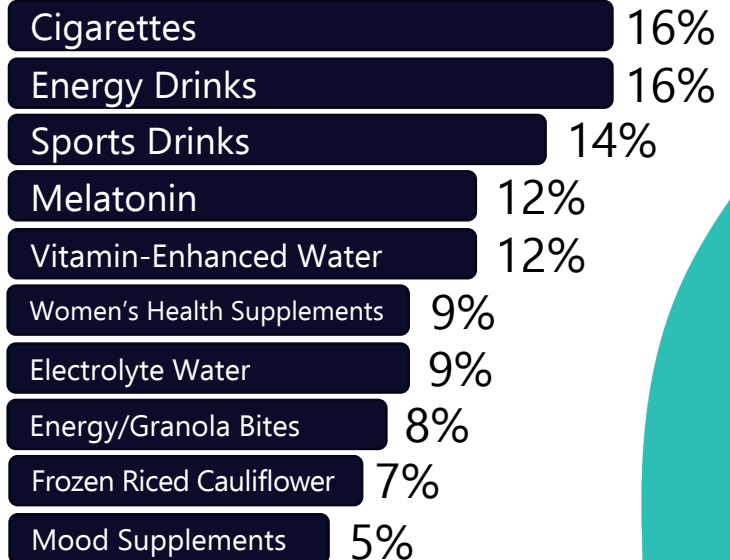
Over-indexes among **lower-income** consumers

Top need states are **focus + relaxation**



Over-Indexing Products

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

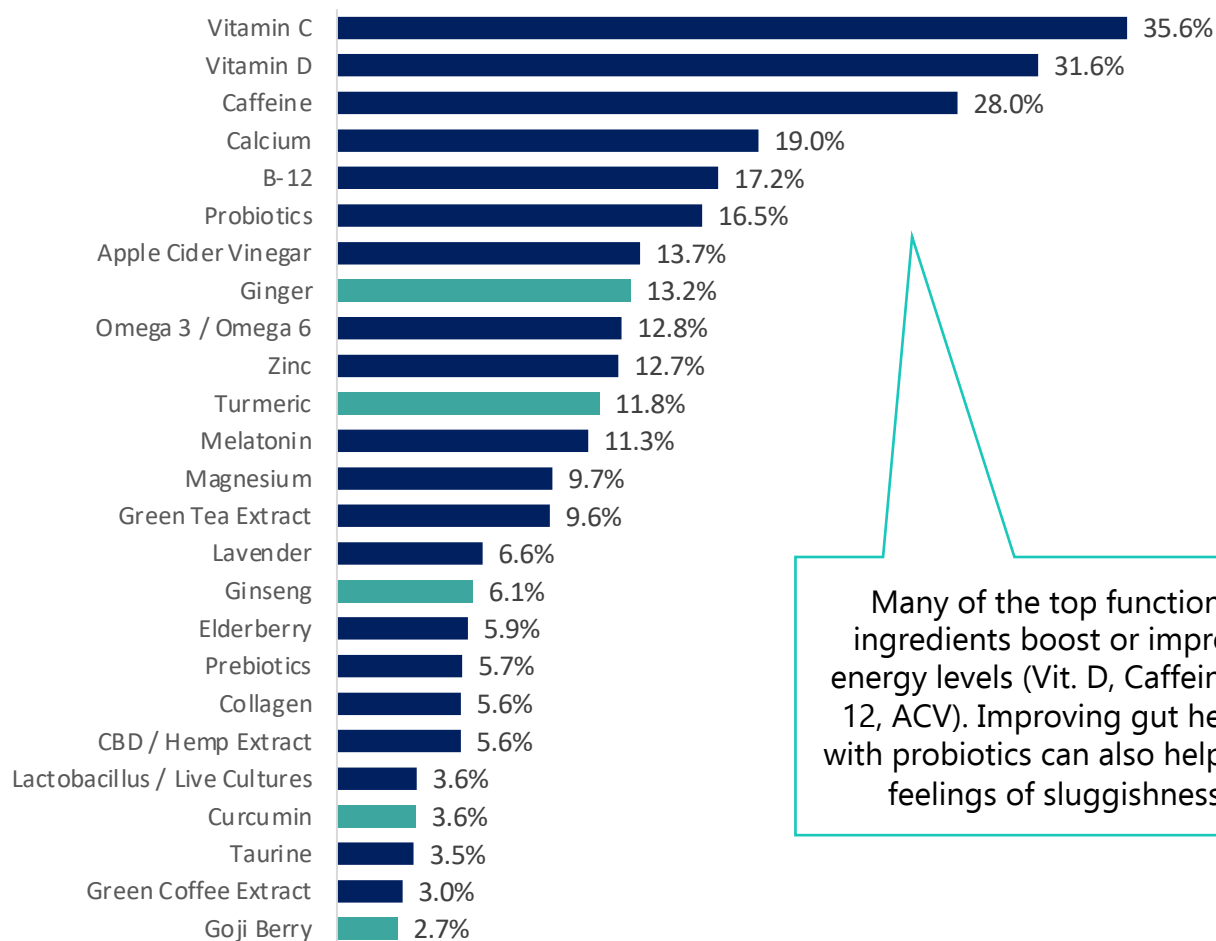


Identify emerging trends

Adaptogens provide opportunity for need state-centric innovation.

Top 25 Functional Ingredients

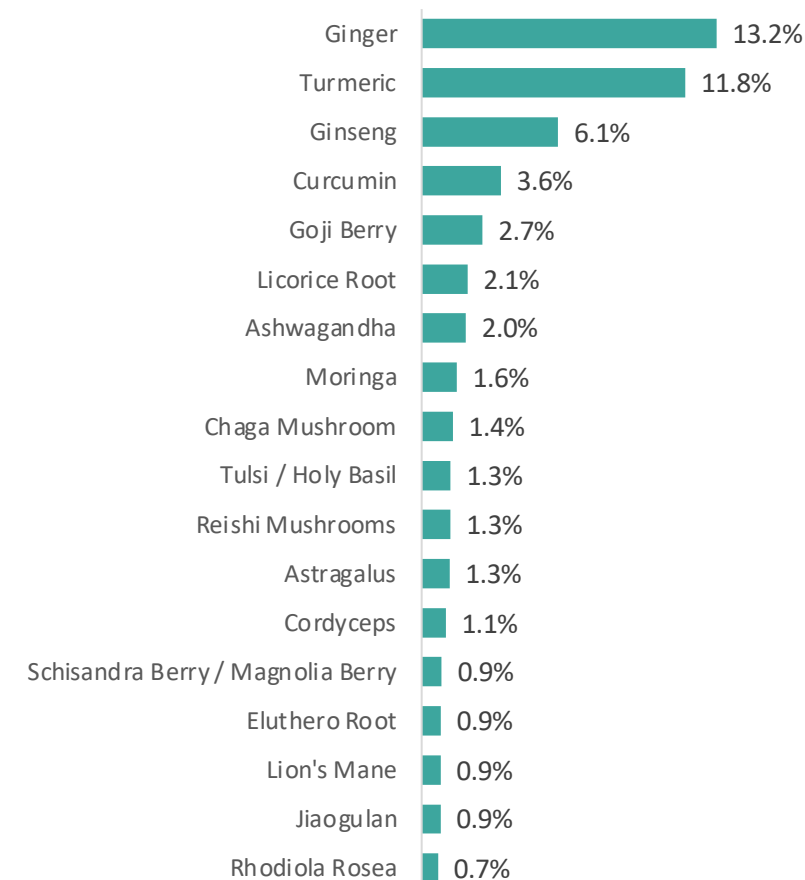
% purchased in last 3 months



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

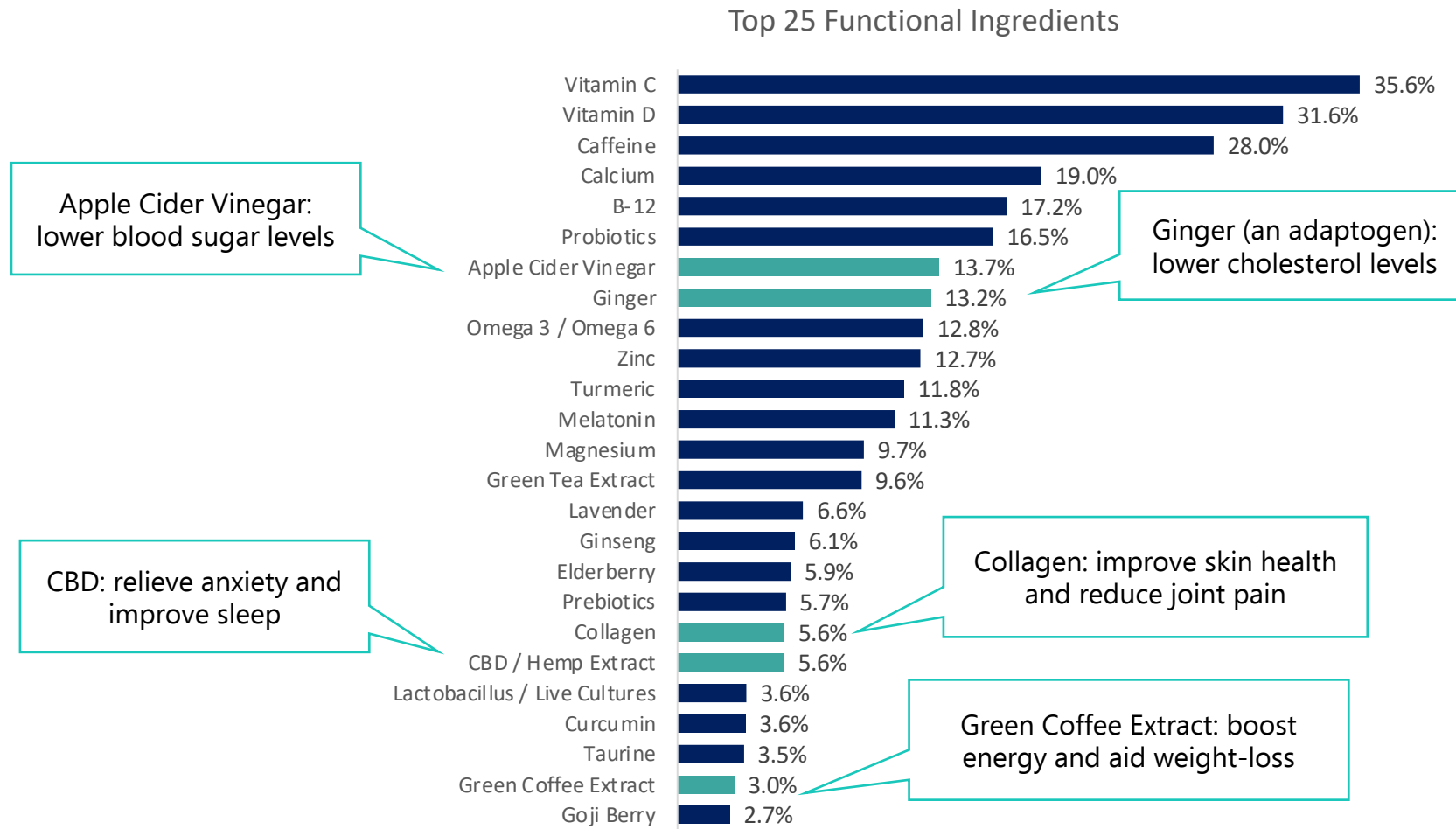
% purchased in last 3 months



Tie the emerging trends to your consumers' need states

Shoppers looking for newer ingredients like adaptogens and CBD in addition to standbys like vitamin C.

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



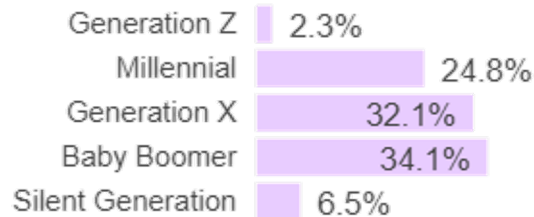
Tie the emerging trends to your consumers' need states

Turmeric



- More established in the market overall (11.8%)
- Over-indexes among Baby Boomers due to its anti-inflammatory benefits. Also boasts benefits such as lowering risk of brain disease and improving brain health.

Age



Income

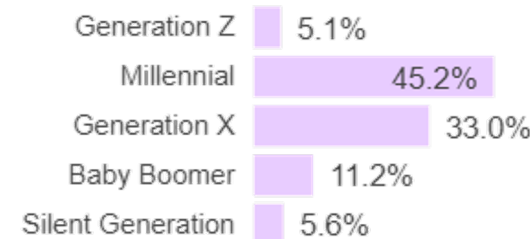


Goji Berry

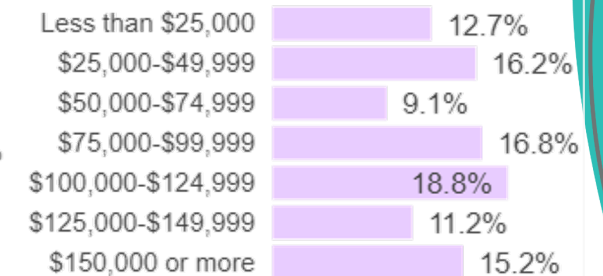


- An emerging functional ingredient (2.7%), but is more well-known than other adaptogens
- Over-indexes among Millennials, Gen-Xers, and higher-income consumers. Known for variety of benefits from immune system support to anti-aging

Age



Income



Key Takeaways

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





Providing innovative ways for consumers to **achieve various need states** through your products gives you the consumer a more valuable connection to your brand.

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Thank you!

Any questions?

kstevenson@brightfieldgroup.com