



Staying Well During a Pandemic

How Consumers Stressed by
COVID Achieve Wellness



Introduction

The COVID-19 pandemic has brought wellness and personal health to the forefront of daily life. Stay-at-home orders and social distancing have changed how we relax and have fun. Fluctuating case counts and new information keep our own immune systems and preexisting conditions at top of mind.

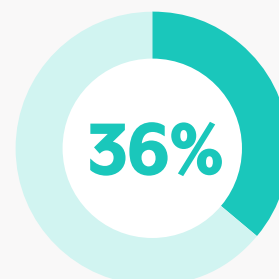
56% of Americans say they are often anxious and stressed out.

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

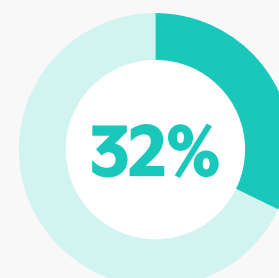
Currently, the coronavirus pandemic is a leading stressor of 36% of consumers' lives—a bigger stressor than money or work. Significant points in history can accelerate emerging trends, including consumer package goods. A deeper understanding of consumer needs in times of stress are a strong indicator of what's next.

Main Causes of Stress

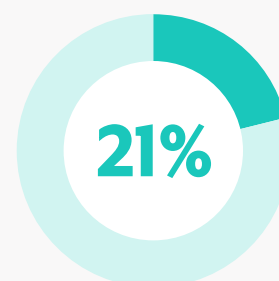
% of consumers who report stressor as a main cause of stress



COVID-19



Money



Work

65% of Americans agree that functional foods and beverages can be substituted for some medicines.

Consumers are turning to specific products to stay well during the pandemic—from vitamin D to turmeric tea.

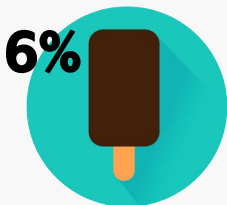
As brands continue to meet these needs, they should have a strong understanding of why consumers want these products. This is the core of empathy marketing. Brands that listen to their consumers and market with empathy set themselves up for satisfied, loyal customers.

In this report, we dive into the minds of consumers most stressed by COVID—from demographics to shopping preferences. We compare consumers who report COVID as a leading stressor to the general population to answer the question—what are the **“COVID Concerned”** doing to stay well amidst the pandemic?



What functional foods and beverages are Americans buying?

% Americans report purchasing in last 3 months



6%

Low Calorie
Ice Cream



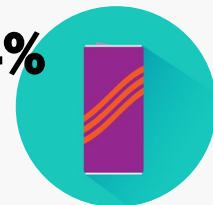
9%

Vitamin-
enhanced Water



10%

High Protein
Yogurt



14%

Energy
Drinks

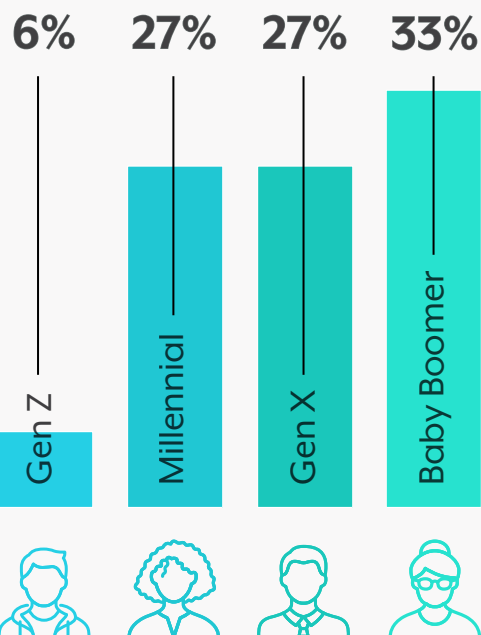
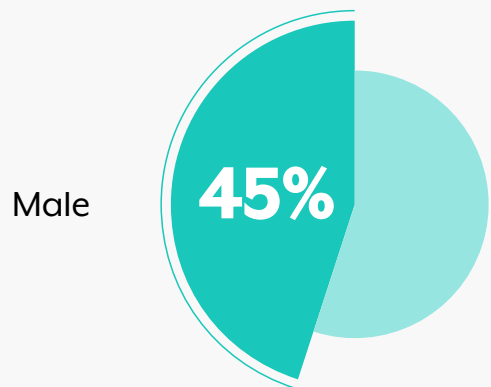
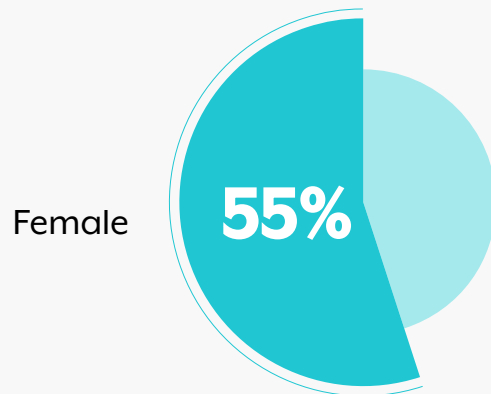
COVID Concerned: Consumers who list “COVID-19” as one of their **top 3 stressors**.

Source: Evergi Consumer Insights, N=5,000 US Gen. Pop.

Demographics

COVID Concerned consumers are more likely to be women than men. The additional household duties brought on by closed schools and stay-at-home orders has inequitably fallen on women. With more to focus on at home, mothers have been three times more likely to lose their job during the pandemic according to Pew Research.

Those most concerned with the pandemic are also more likely to be baby boomers (age 57-75). Older adults are more at risk for serious COVID complications, making it a more pressing issue for aging baby boomers. Gen Z and millennials are more likely to be stressed by money, which is likely intensified due to the economic impacts of managing the pandemic.



Ingredient Preference

When it comes to nutrition, COVID Concerned consumers say more ingredient claims are important to them than general population. This indicates they are more conscious and selective in what they purchase. Over half (52%) of them prefer “real food ingredients” and another 40% prefer “no preservatives.”

Health Claims

With the virus being more severe for people with preexisting conditions, it follows that these consumers are more likely to desire products that support heart health, digestive health, and are immune boosting. This group especially over-indexes for products that help lower cholesterol (+25% over-index), which is reflective of its skew towards older adults. Additionally, managing cholesterol levels helps keep the body healthy and able to fight viruses.

Medical Conditions

Consumers most stressed by COVID over-index for diabetes, digestive conditions, and chronic pain. These conditions all require daily attention, whether it be special food, daily medicine, or tending to aches. With their health on the mind, COVID could be a bigger stressor.

Referencing the **U.S. Center for Disease Control and Prevention**, diabetes is the only condition of the three that increases the risk of COVID complications. Other health conditions on the list—like obesity and heart disease—do not significantly over-index for this population.

COVID Concerned Ingredient Usage

% Ingredient Usage vs. General Population

Ingredient Usage General Population

Vitamin C:

39%

35%

Vitamin D:

35%

31%

Caffeine:

30%

27%

Calcium:

21%

19%

B-12:

19%

17%

Top Ingredients on Social Media

% of wellness social conversations for ingredients

22%

13%

10%

9%

7%

CBD

Garlic

Lavender

Ginger

Collagen

Maintaining Well-being

What do COVID Consumers do to destress? They over-index on nearly all the top 10 stress-reduction tactics, especially engaging in media, getting enough sleep, going for a walk, and spending time with friends or family.

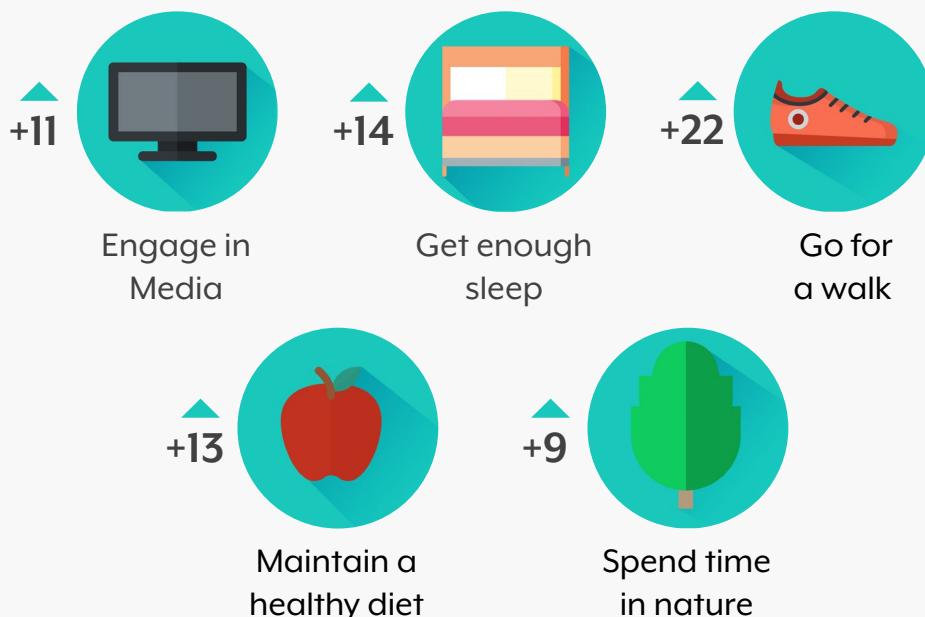
Entertaining ourselves while social distancing can help distract from the ensuing pandemic, while going for a walk offers a change of scenery. How we maintain social interactions and sleep schedules may be different during stay-at-home orders, but these consumers are still leaning on them to manage stress.

The more brands understand how consumers are managing stressful situations, the more opportunities they may find to insert themselves into consumers' lives.

With this understanding, brands can have a specific, nuanced response that make sense to their customers. This prevents your brand from sounding like everyone else.

What do you typically do to improve your overall well-being or reduce stress?

% COVID Concerned over-index vs. general population



Shopping & Branding Attitudes

Consumers whose main stressor is COVID are more likely to care about supporting social causes when they shop. The pandemic has strained small businesses, prompting them to **ask consumers** to spend money with local sellers rather than large corporations who have no issue staying open. Those concerned about the pandemic may have the issue of small business shutdowns on their mind.

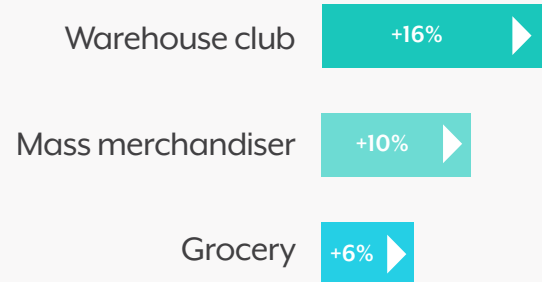
When asked if they believe companies should support social causes, COVID Concerned consumers are 9% more likely to agree than the general population. They likely expect larger companies to do their part in relieving the strain of the pandemic.

Frequent Shopping Channel

Through various stay-at-home orders, food and beverage channels have remained open to feed the public. Consumers chiefly stressed by COVID are more likely to shop at warehouse clubs and mass merchandisers. To prevent the spread of COVID-19, consumers are encouraged to take less trips for food and goods. Warehouse clubs and mass merchandisers are especially useful to people following this guideline as they provide the largest package sizes.

Over-Indexing Purchase Channels

% COVID Concerned over-index vs. general population



Products

% COVID Concerned over-index vs. general population



Key Product Takeaways

The COVID Concerned...

DO like healthy proteins like plant-based meat. With their over-index for lowering cholesterol and shopping at warehouse clubs, plant-based meat fits their dietary concerns and is **becoming more affordable** and available where they shop.

DO want to support their digestive health. Icelandic yogurt is particularly helpful in maintaining a healthy gut—something they care about when looking at ingredient health claims.

DO NOT prefer preservatives. Chips, cookies, and bars—no matter what ingredient—may not land well with this audience.

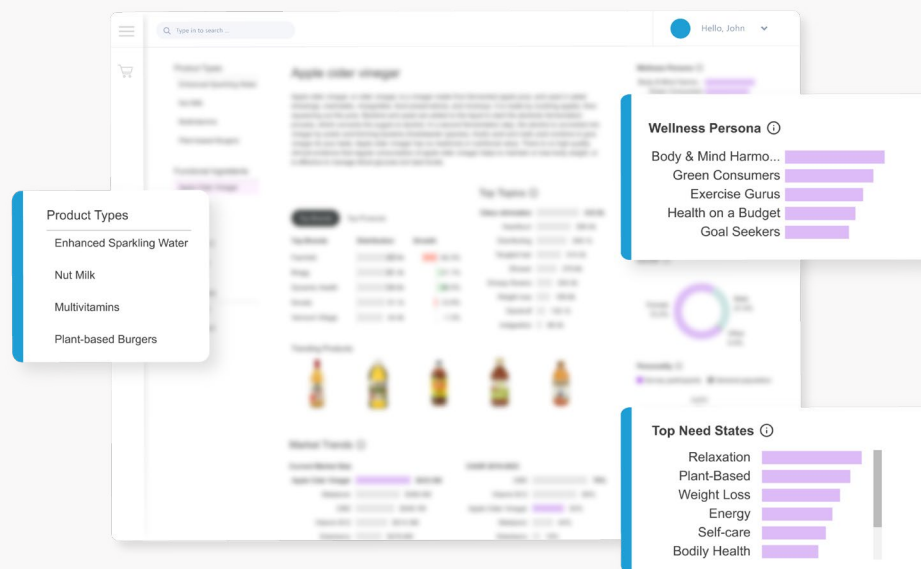
DO NOT add sugar. One of their top over-indexing ingredient preferences is low sugar products, and a larger number of these consumers report diabetes. Cauliflower crusts and hard seltzers have less sugar than their glutenous counterparts, pizza and beer.

Final Thoughts

It's clear wellness trends have been magnified by the pandemic. Consumers—including those most concerned about COVID—are embracing healthy ways of coping with the stress of the pandemic instead of turning to less healthy alternatives. It is up to many consumer brands in the food, beverage, and naturals space—just to name a few—to focus on why consumers are looking to specific products and ingredients during times of stress. This will help ensure they effectively market and position consumer-centric products with empathy. Overall, a strong understanding of consumer behaviors and expectations during this volatile time can uncover the deeper meaning and direction of consumer trends.

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