
2022 Emerging Trends in the Health and Wellness Consumer



Background and Methodology

- 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
- Our **social listening** dashboard is created specifically for the emerging wellness industry. Identify the products, brands, and topics consumers are talking about to drive a stronger go-to-market.
- **Consumer Survey Methodology**
 - Fielded quarterly online with 5,000 US consumers age 21+
 - We use third-party panel providers to field the survey with general population audience, which is census balanced on age, gender, and geography
- **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
- **Health Continuum**
 - Each product or ingredient is assessed for a “fall-off point”, where we see a large penetration drop between segments or income levels. The “fall-off” point is mapped for both consumer segment and income.
- **Scorecards**
 - Each product is assessed on the health continuum, Evergi consumer data, search history, and social communications

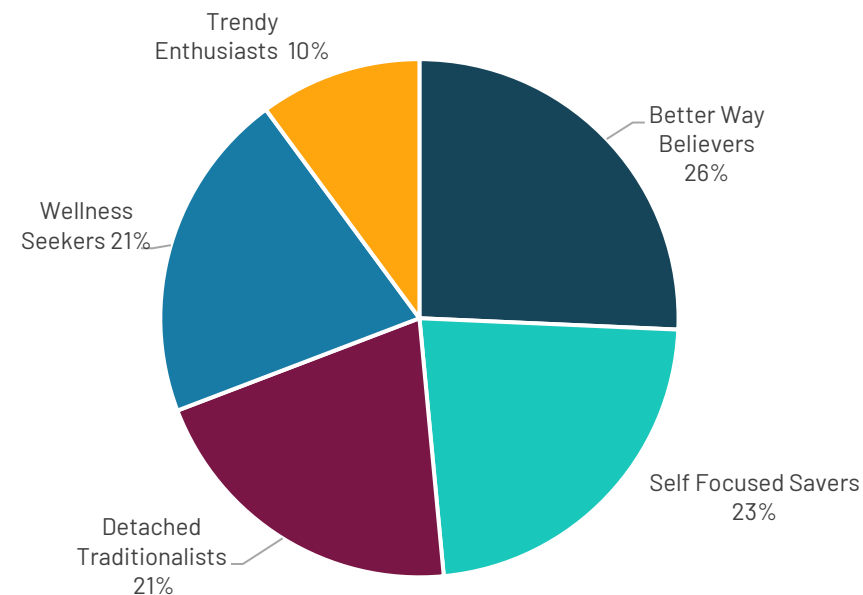
Summary

- Increasingly tough economic situations and continuing COVID concerns are causing consumers to reprioritize their health and wellness goals
 - Basic Need States like Sleep, Relaxation and Exercise have seen rapid increases this quarter
 - Consumers are looking to functional ingredients to meet their needs in all these areas
 - Stress continues to increase among consumers, and they are increasingly looking to ingredients like Ashwagandha, Reishi Mushrooms, and CBD to help them relax
- Evergi Segments are an important way to understand product opportunities in this ever-changing health market, allowing us to see where products and ingredients are in their lifecycle

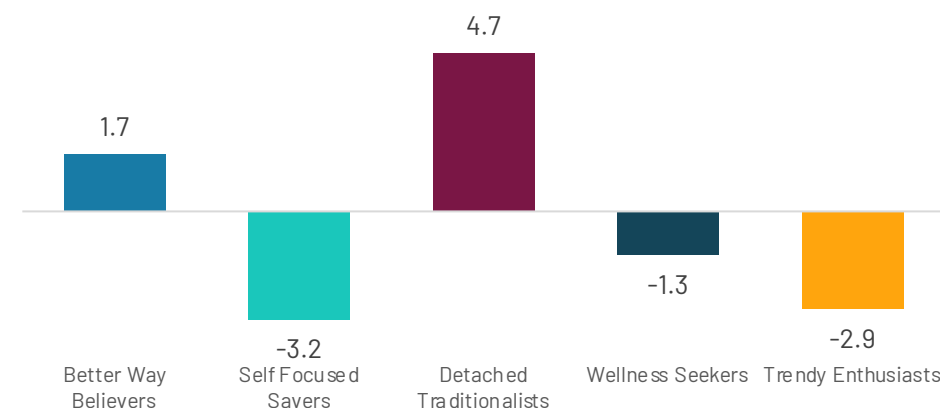
Economic factors and stress have caused a shift in wellness segments

- Consumers are trying to meet the bare minimum of their wellness needs, potentially driven by loss of income
- The shift from **Wellness Seekers** and **Trendy Enthusiasts** (super health focused product segment) toward **Detached Traditionalists** (very little focus on health products) illustrates this shift toward more basic needs
- Evergi Segment Summaries
 - **Trendy Enthusiasts** — *These trendsetters are total cutting edge wellbeing gurus – they are focused on bettering their mind, body, spirit, and the planet with all the latest fads available.*
 - **Wellness Seekers** — *Wellness Seekers are fast followers that pay close attention to the latest wellbeing trends to improve their mind and body.*
 - **Better-Way Believers** — *They are focused on bettering their bodies and the planet through "the right way", "the better way", and trying new "proven ways."*
 - **Self-Focused Savers** — *These budget conscious consumers are focused on more traditional, less intense and basic wellbeing habits that improve their health.*
 - **Detached Traditionalists** — *They are not into the latest fads or wellbeing trends; They are more comfortable using traditional products/ingredients.*

W4 Evergi Segments

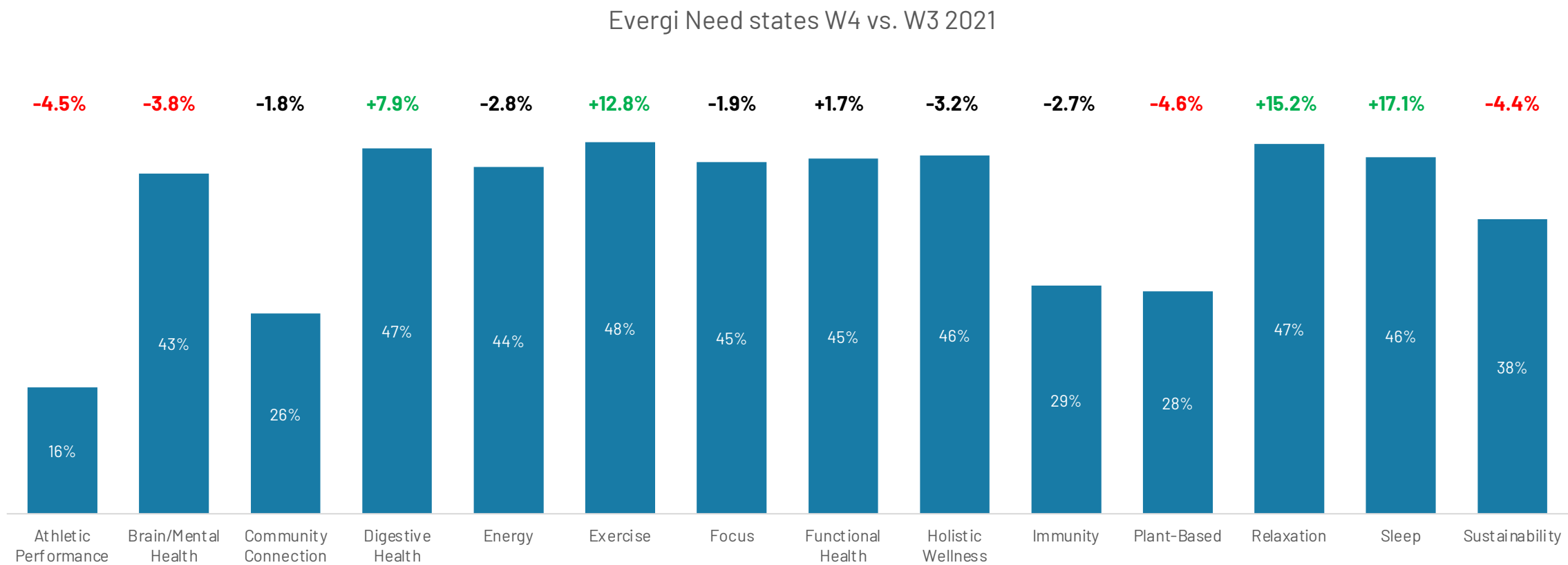


Change vs Q3



Need States

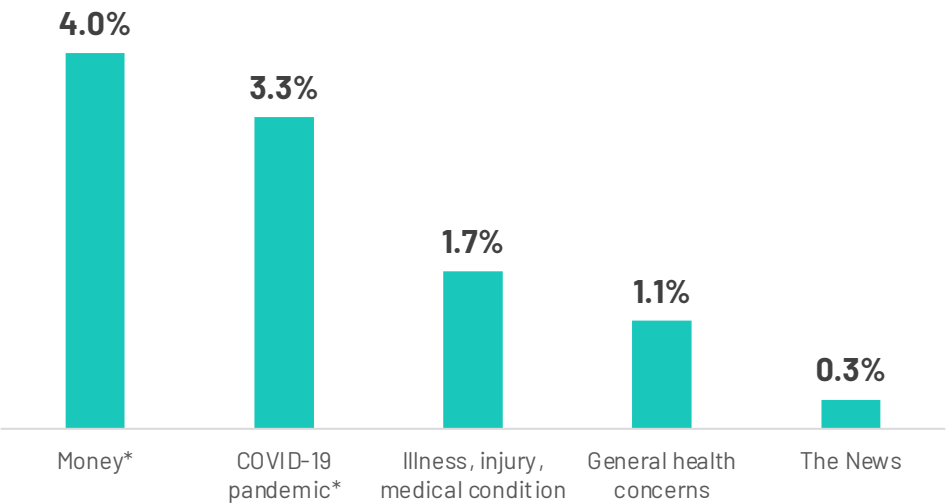
We’re seeing a consumer shift towards the **Relaxation**, **Sleep**, and **Exercise** need states, and a decline in things like Sustainability and Mental Health — indicating a shifted focus on some of the more “*basic*” health needs



Increased stressors, including money and COVID-19, are causing consumers to shift toward the more basic health need states

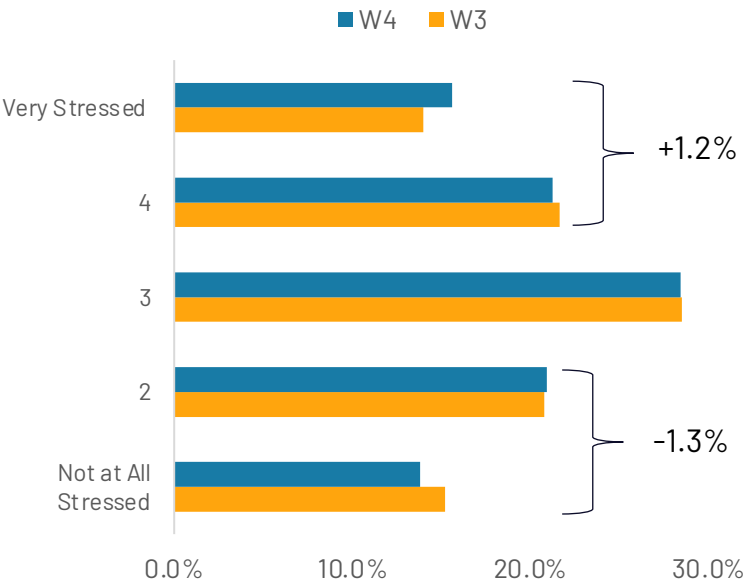
- Consumers are increasingly stressed with 65.2% reporting a stress level of 3 or higher
- Money is generally a top cause of stress, and with 4% growth, has become a stronger stressor

% Change in consumers stress causes



** Q4 was fielded between Thanksgiving and Christmas—common times for money worries to spike; however, we do see a significant increase over December 2020 as well. Additionally, COVID-19 Financial packages had just ended. COVID-19 Omicron variant had just emerged in the US during fielding of W4.*

Consumer Stress Level on a scale of 1-5



SLEEP:

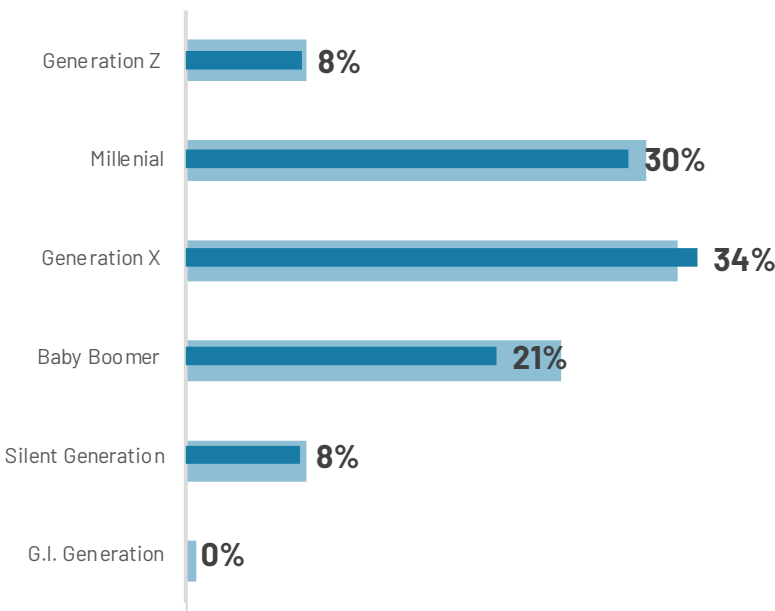
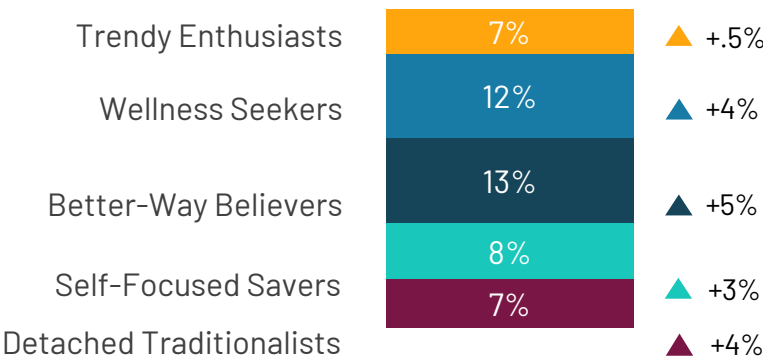
Focused on
getting some Z's



Consumer focusing on sleep needs span our consumer wellness segments and age groups

- Consumers focusing on sleep needs span our consumer wellness segments and age groups — however strong increase have been seen among our segments more focused on tried-and-true wellness methods.
- Strong growth has been seen among our segments who are more focused on tried-and-true wellness methods (Wellness Seekers & Better-Way Believers).
- Gen X more likely to be focused on sleep; while Boomers are less likely to be included.

46% of consumers fall into the sleep need state



Those in the sleep need state are seeking functional ingredients to achieve their goals

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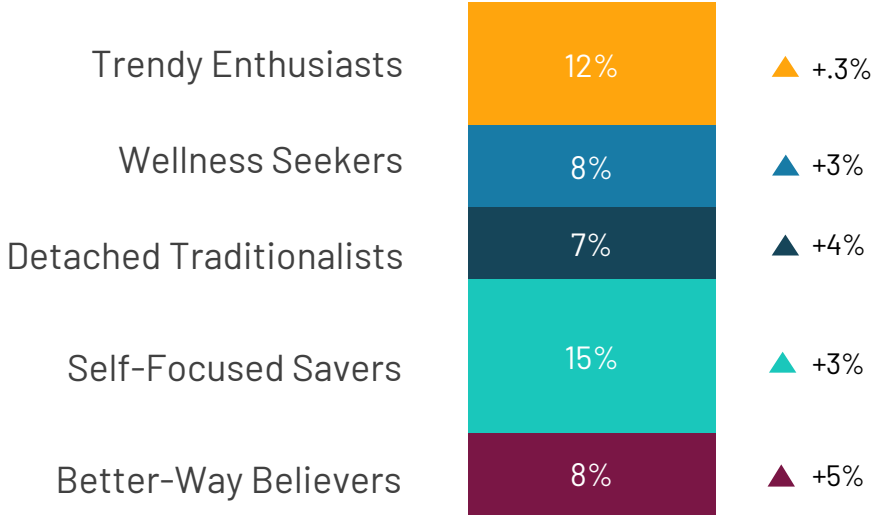
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Relaxation:
Focused on
reducing stress

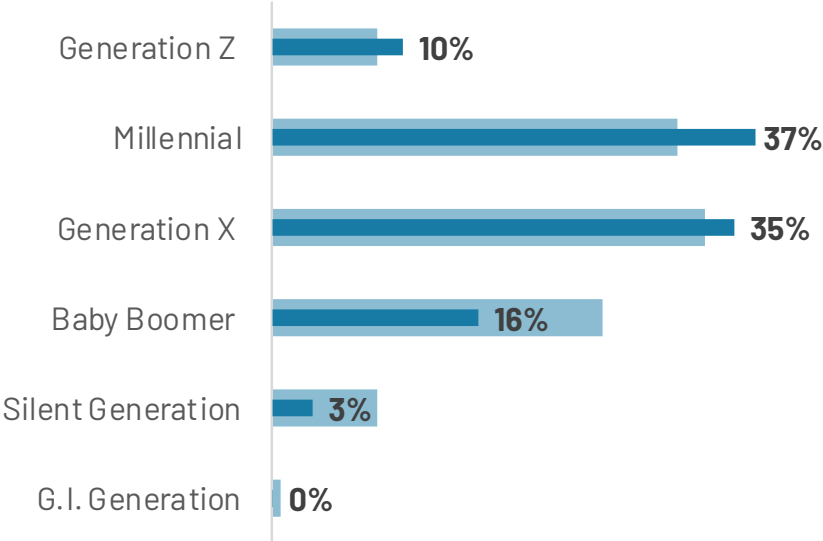


Half of American consumers are seeking relaxation and stress relief; Up 13% since 2020

47% of Consumers fall into the Relaxation need State



Relaxation skews heavily to Millennial and Gen-X



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Exercise:

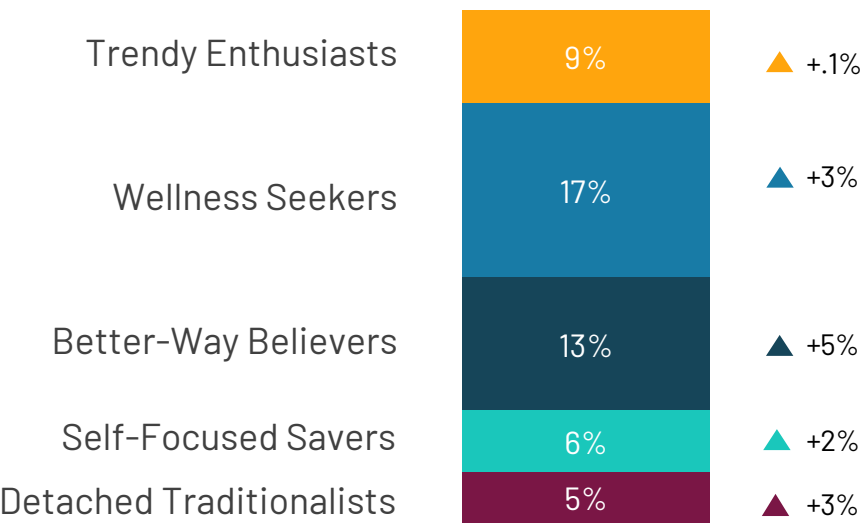
Elevating their Workout Experience



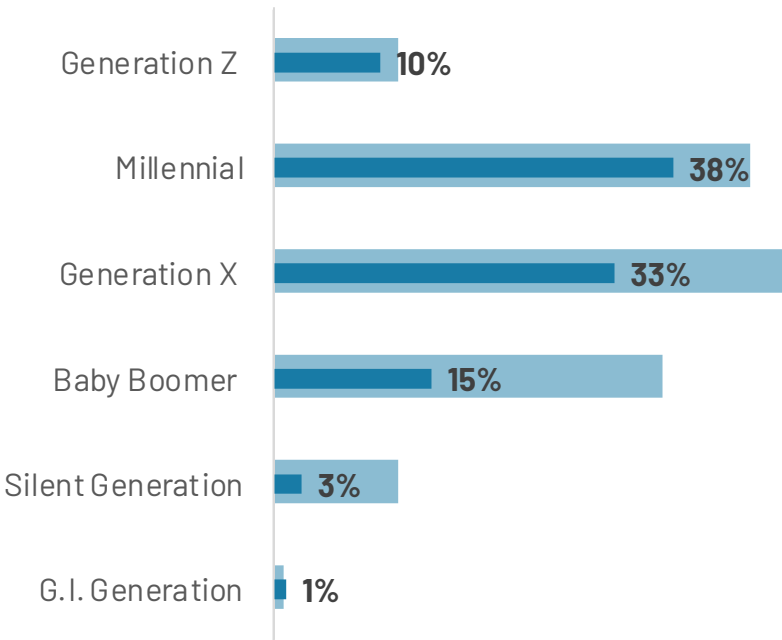
Exercise need state grew 13% since Q3; Exercise consumers tend to skew younger and more male

- Higher incomes allows them to try more products to help meet their exercise goals.

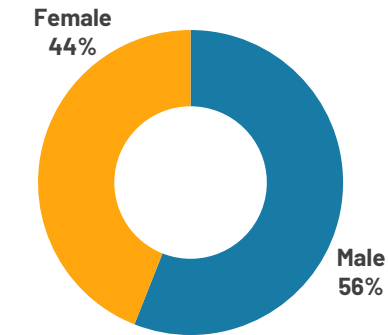
48% of American Consumers fall into the Exercise Need State; growth coming from Better-Way Believers



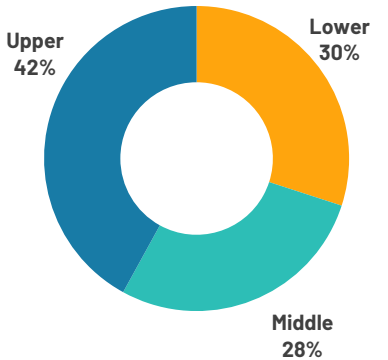
Exercise skews heavily to Millennial and Gen-X



Gender



Income



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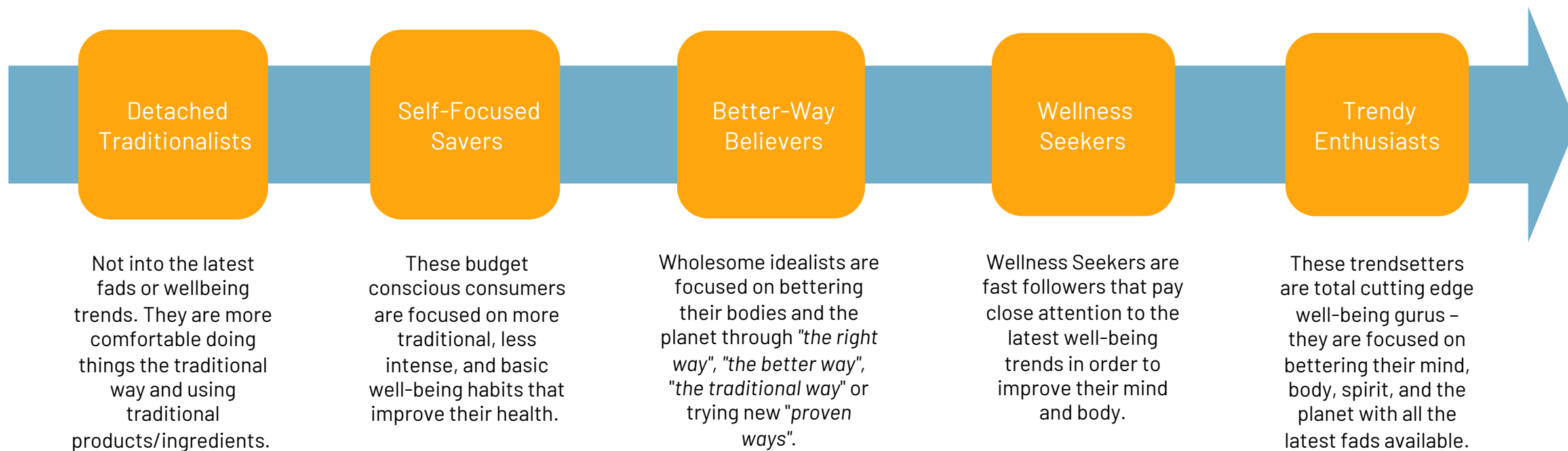
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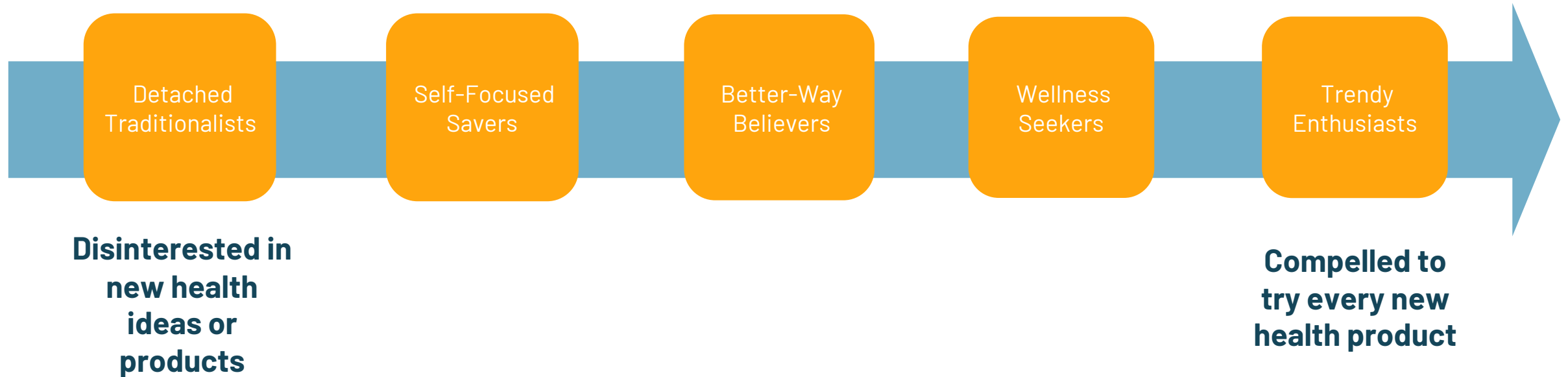
Intro to Evergi Innovation Grids



Evergi Health Segments can be viewed on a health continuum



...This continuum can help us see where products are in their life-cycle





Income is another important dimension for innovation — It indicates consumers' ability or willingness to pay



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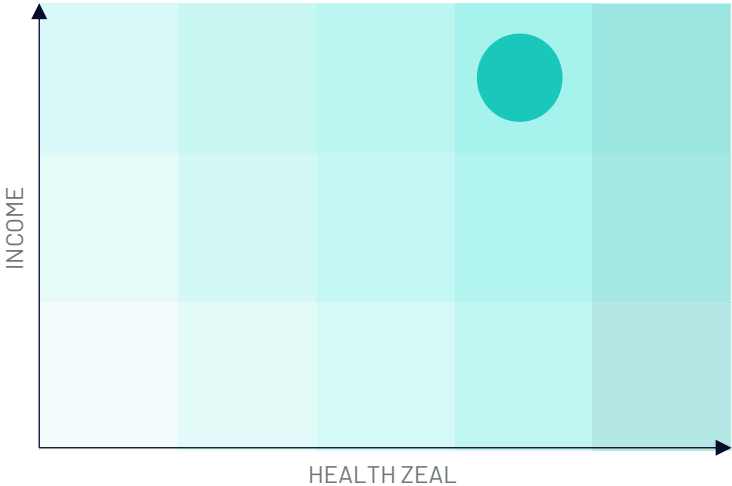
Innovation Scorecard



Kombucha



HEALTH CONSCIOUS, HIGH INCOME DRINKERS

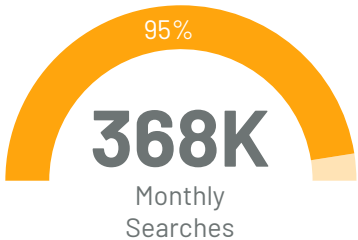


STILL HOT, GROWTH SLOWING

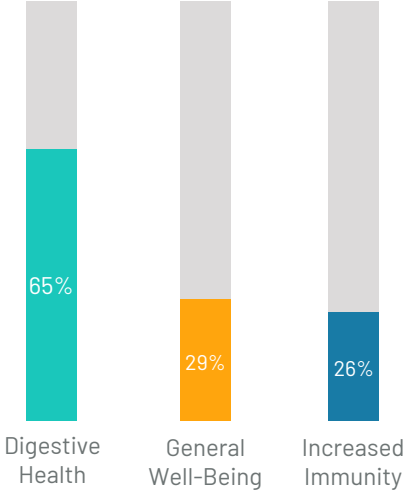


+123%
YOY

HIGH LEVELS OF SEARCH AND SEO SATURATED

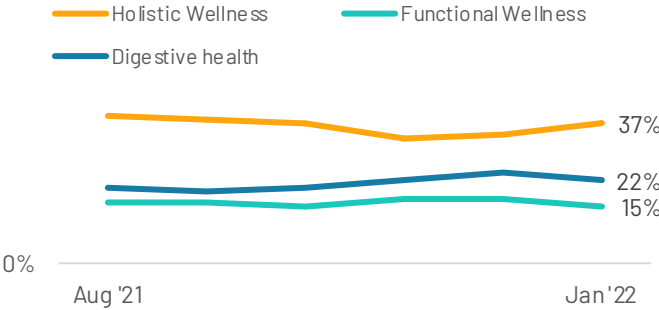


DESIRED EFFECTS

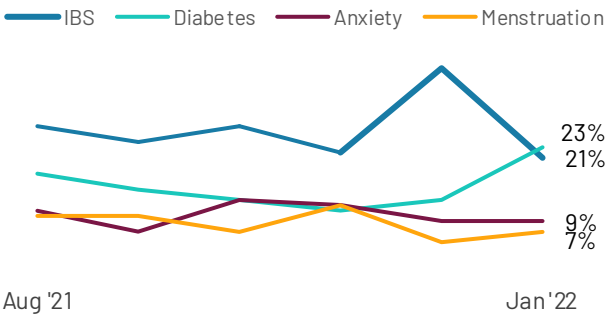


SOCIAL INSIGHTS

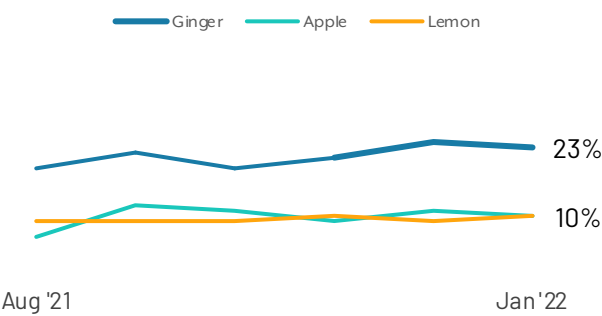
Topics Mentioned



Conditions Mentioned



Flavors Mentioned





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Jerky/Meat Sticks



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Oat Milk Latte



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