HealthFocus® INTERNATIONAL

Wellness Game Changers for Tomorrow
2019 U.S. Report – Detailed Outline

This 2019 report from HealthFocus International takes a deeper look at the top game changing wellness trends that are affecting consumers of today. Sourced from the 2018 HealthFocus U.S. Trend Study, this report will help companies better understand shopper motivations and attitudes—allowing them to connect more powerfully with their targets and bring market solutions faster and more profitably.

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TOPICS COVERED:

- **Loss of Trust in Big Brands**
  - How do shoppers feel about big brands vs. small niche brands on the following factors? Shown overall and by demographics (age, gender, children in household)
    - More trustworthy
    - Offers a higher quality product
    - Cares more about sustainability in their manufacturing process
    - Believes more in the product they are offering
    - Are at the forefront of new trends
    - Have a higher level of expertise in what they are producing
    - Are more innovative
    - Care more about the ethical treatment of animals
    - Use higher quality ingredients
    - Produce healthier products

- **Clean-Conscience Eating: The Evolution Beyond Eating Clean**
  - The primary motivators behind personal health: Mental/emotional well-being, healthy weight, balanced diet, regular exercise/active lifestyle
  - Interest in eating clean - by demographic
  - Frequency of choosing clean foods/beverages - by demographic
  - Why are they interested in eating clean - by demographic
    - Healthier
    - Long-term health
    - I want to avoid chemicals in my food
    - I want to avoid artificial ingredients
    - Food safety
    - I want to know more about the ingredients
    - I want to know more about where my food comes from
    - I want to know more about how my food is made
    - Better for the environment
    - I do not trust big food companies
  - Are they planning on eating clean more often - by demographic

- **Plant-Based Diets in a World Without Meat**
  - Increasing or decreasing use of:
    - Plant-based foods (made from fruits, vegetables, grains)
    - Foods with added plant-based ingredients (e.g., yogurt with fruit, cereal with nuts)
    - Plant-based beverages (e.g., plant milks (soy, almond, etc.), plant waters (coconut, aloe))
    - Beverages with added plant-based ingredients (e.g., spices, botanicals, fruits)
  - Primary Drivers in the Trend Towards Plant: Daily living, Health, Social
  - Interest in Plant-based foods/beverages & Vegetarian eating – by demographic
  - Frequently choose plant-based foods/beverages – by demographic
  - Increased use of meatless meals, plant-based foods/beverages, plant-based protein over the past 2 years – by demographic
  - The importance of the following factors in driving your plant-based food/beverage choice – by demographic
    - Promotes daily health
    - Promotes long-term health
    - Helps prevent disease
    - More energy
    - It's a taste preference
    - It's a lifestyle preference
    - Environmental/sustainability reasons
    - Better treatment of animals

- Eating clean
- Which of the following applies to plant-based foods/beverages – by demographic
  - Healthier overall than animal-based foods/beverages
  - More nutritious than animal-based foods/beverages
  - Safer to eat than animal-based foods/beverages
  - Chemical/residue free
  - Safer than animal-based foods/beverages for the environment
  - Fresher than animal-based foods/beverages
  - Better quality than animal-based foods/beverages
  - Better tasting than animal-based foods/beverages
- Do they view their increased plant product consumption and/or decreased animal product consumption as a permanent change or are they just exploring?

- **Healthy Indulgence: The Future for Snacking and Well-being**
  - Do people want all categories to be healthier, or should categories like soft drinks, snacks and candy be left alone because that's not why you buy them? – by demographic
  - Attitudes towards health and indulgence – by demographic
    - I wish I had healthier options in indulgent food/beverage categories
    - It is hard to find indulgent snacks that I believe are healthy
    - I feel guilty when snacking on indulgent foods/beverages
    - Healthy and indulgent do not go together

- **Drinkable Health: The Emergence of Power Beverages**
  - Belief that beverages can provide the same nutrition as foods – by demographic
  - Highly interested in drinkable products that provide the following – by demographic
    - Health benefits (e.g., lower cholesterol)
    - Convenience
    - Weight management
    - Added vitamins and nutrients to my overall diet
    - Sustained energy
    - Burst of energy
    - Replacement for a snack
    - Replacement for a meal
    - Satiety

- **Personalization: Beyond SKU Proliferation**
  - Interest in foods/beverages that are personalized to me – by demographic
  - Which eating occasions do you wish you had more personalized options? – by demographic: foods, beverages, snacks, breakfast, lunch, dinner, supplements

- Why is personalizing your diet important? – by demographic:
    - Better health
    - Better nutrition
    - Better control
    - Taste
    - Cleaner product
    - To meet specific needs
    - More natural
    - Flavor
    - It's fun or interesting
    - Experimentation

- **Science and Technology in a World of Natural and Non-Processed**
    - Attitudes about technology in foods – by demographic
        - Foods and beverages should be as natural as possible without the use of any external science and technology
        - I believe that science and technology can be used safely in the food/beverage industry
        - Science and technology that is safe is necessary for the supply of foods and beverages
        - I accept scientific and technical improvements to foods and beverages if they provide benefits I want
        - Use of science and technology to improve the stability (shelf life, separation, preservation) of foods and beverages is ok
        - Use of science and technology to improve the appeal (color, shape, texture) of foods and beverages is ok
    - Acceptance of ingredients that you don't recognize if they could improve a product in the following ways – by demographic
        - Has important health benefits (e.g., lower cholesterol)
        - Tastes better
        - Provides added fortification/added nutrition
        - Provides safety from spoilage and contamination
        - Longer shelf life
        - Provides stability in the product (e.g., doesn't separate)
        - Has the texture you expect
        - Has the appearance (color/shape) that you expect

- **Accessing Health and Nutrition: I want What I Want, When I Want It, How I Want It**
    - Has your food and beverage delivery changed over the past year - Increasing/Same/Decreasing shopping at the following:
        - Grocery delivery from a major online retailer (e.g., Amazon Fresh, Walmart Grocery)
        - Grocery delivery from your local grocery store
        - Recipe delivery services (e.g., Blue Apron, Hello Fresh)

- Restaurant delivery service (e.g., Grub Hub, Door Dash, Uber Eats)
- Online
- Other food delivery (e.g., Omaha Steaks, Schwann's)
- Do they wish there were healthier options available, or does the selection fit their needs? – by demographic
    - Supermarket/grocery store
    - Farmers Market/local farm stand
    - Small health or premium grocery store
    - Grocery delivery from a major online retailer (e.g., Amazon Fresh, Walmart Grocery)
    - Online
    - Grocery delivery from your local grocery store
    - Recipe delivery services (e.g., Blue Apron, Hello Fresh)
    - Other food delivery (e.g., Omaha Steaks, Schwann's)
    - Restaurant delivery service (e.g., Grub Hub, Door Dash, Uber Eats)
    - Multi-level marketing sources/Direct sellers (e.g., Amway)
    - Drugstore or pharmacy
    - Convenience stores
- What are the primary barriers to shopping for foods and beverages online? – by demographic
    - I prefer to choose my own products at the shelf
    - I need to see and touch the items
    - Product selection
    - Delivery time/schedule
    - I don't know what I need until I see it
    - I don't trust online shopping
    - Too difficult
    - Online shopping is not available to me