



HEALTHY IS IN THE HEAD:

Consumers Put Feelings over Physical

2022 Global Topic Report – Detailed Outline

Health is no longer rooted in the physical. Consumers now view emotional well-being as the cornerstone of health—fueling greater desire for mental power, feeling confident, and stress reduction. We explore the new definition of wellness around the world, revealing new opportunities for positioning healthy products.

This report from HealthFocus International takes a deeper look into this topic globally, regionally, and across 23 individual countries to help companies better understand shopper motivations and attitudes. This allows them to connect more powerfully with their targets and bring market solutions faster and more profitably.

MARKETS:

- NORTH AMERICA: USA and Canada
- LATIN AMERICA: Brazil and Mexico
- EUROPE: France, Germany, UK, and Russia
- MIDDLE EAST & AFRICA: Saudi Arabia, Turkey, and Nigeria
- SOUTH ASIA: India and Pakistan
- EAST ASIA PACIFIC: Australia, China, Indonesia, Japan, Philippines, Thailand, South Korea, Malaysia, Taiwan, and Vietnam

TOPICS COVERED:

- **Redefining Health – How Mental Moves to the Forefront**
 - How many consumers believe good mental/emotional health is an important contributor to their overall health? How does it compare with other key aspects like diet, active lifestyle, and physical health?
 - What is the role of diet? How important are mood/emotional health benefits in their food and beverage choices? Which markets are most focused on emotional benefits from their diet?
- **Physical Health is in the Mind**

- How many consumers believe their mindset/attitude has a great impact on their physical health? How does this vary around the world and among key demographics?
 - Are consumers taking back control over their health?
 - Do they think they have a great deal of control over their health?
 - Do consumer feel more or less in control since COVID-19?
 - Which health issues are most concerning for consumers? Where do mental/emotional issues fall (e.g., anxiety, stress, memory, mood swings, lack of mental sharpness or focus) in comparison to other health problems?
 - Energy needs evolve to feeling good
- **Mental Benefits Consumers are Seeking**
 - How many consumers are actively choosing foods/beverages:
 - to help improve/enhance mood
 - to reduce feelings of stress
 - to improve mental performance
 - for relaxation
 - How do mental/emotional benefits compare to other functional food benefits consumers are looking for? Which markets and demos are most focused on mental benefits from foods and beverages?
 - Are mental benefits a key driver in the “boosted beverages” trend? How many consumers are interested in mental benefits (e.g., stress, focus, etc.) when selecting beverages?
 - **Children’s Emotional Health**
 - How concerned are parents about their children’s emotional health (e.g., stress, anxiety, and depression)? Where does it rank in comparison to other health issues for children? How does concern vary around the world and among key demographics?
 - How many children are personally affected by emotional health issues?
 - **Target Profile: *The Mood Food Consumer***
 - Explores a segment of shoppers, called the “Mood Food Consumers”, to better understand their unique attitudes and needs. The group is profiled globally and sized within each region and country. We will uncover:
 - What their diet and lifestyles look like
 - Their core motivations and barriers to healthy living
 - What they look for in foods and beverages
 - Interest in key dietary trends
 - Ingredient opportunities
 - What do they look for on labels?
 - What drives them to pay more?
 - And much more!

**This is a preliminary outline. The exact topic coverage and analysis will be driven by the data.*