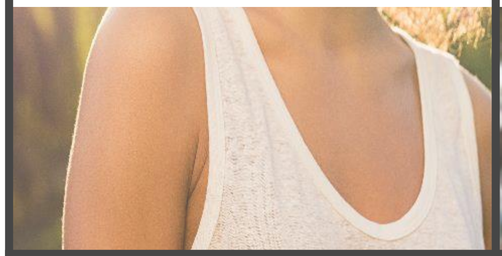
HEALTH FOCUS INTERNATIONAL

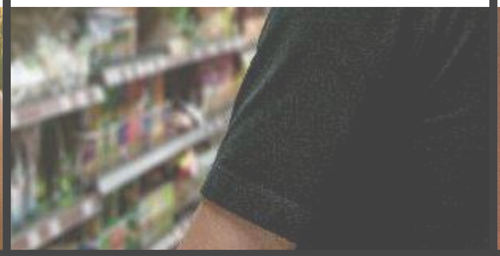
USA TREND STUDY HIGHLIGHTS

Insights from the 2023 HealthFocus USA Trend Study

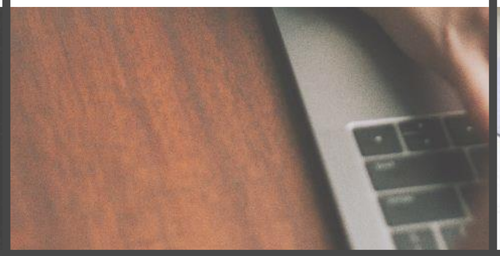
HEALTHY IS IN THE HEAD



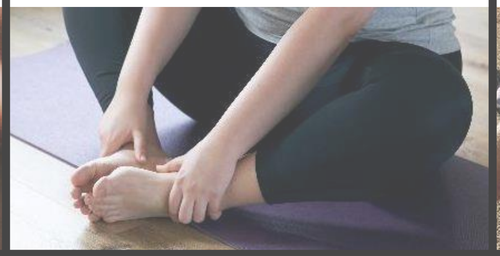
BIG BRANDS LOSING TRUST



INFORMATION OVERLOAD

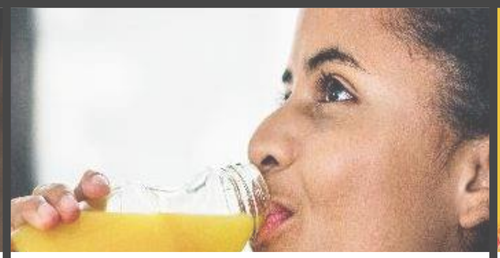


WEIGHT-LOSS GOALS SHIFT



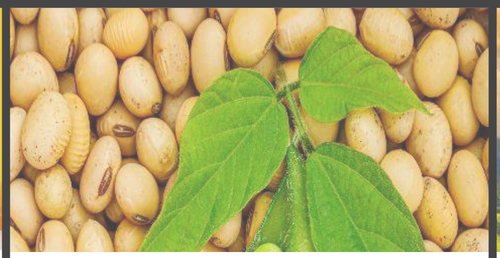
OPPORTUNITIES IN EXERCISE

EXPLORATION ON THE RISE

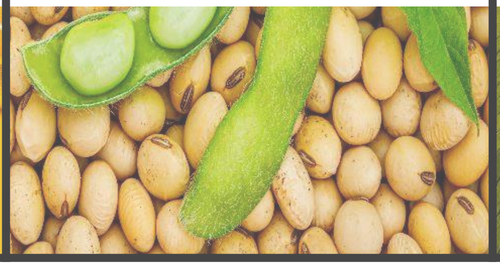


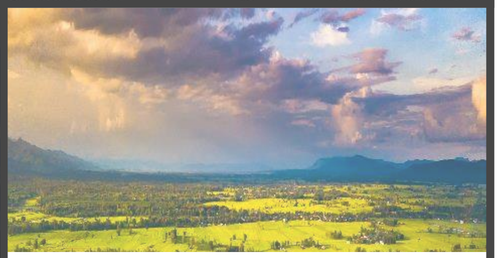
FUNCTIONAL FOODS

EMBRACING SUPPLEMENTS



THE PLANT PARADOX





HEALTHY PLANET, HEALTHY ME

HEALTHY IS IN THE HEAD

Consumers are expanding their definition of health and the factors that contribute to good health. Now, emotional and social aspects are more important to them than diet, exercise, and weight. Younger consumers are most in need of mental/emotional health solutions.

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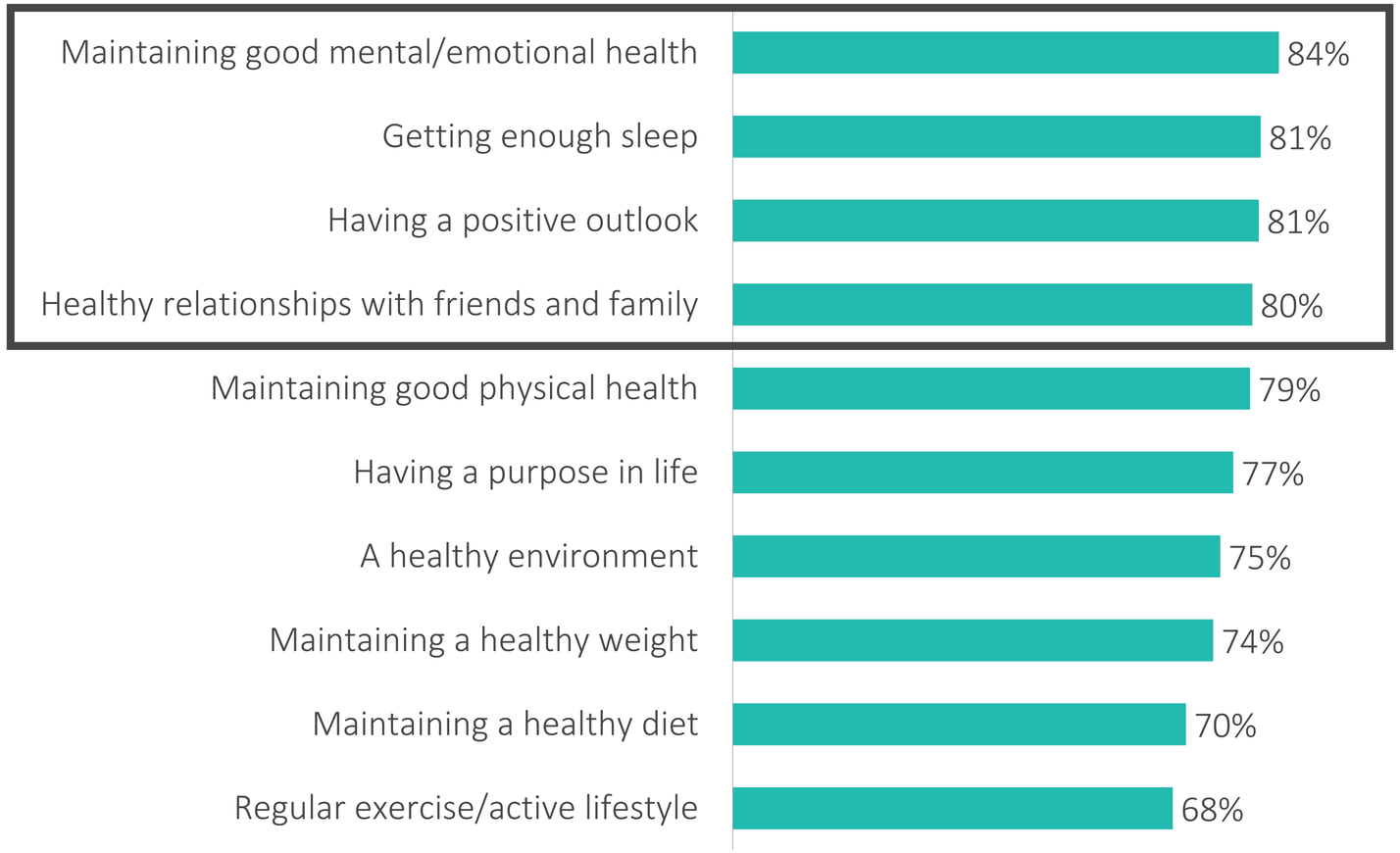
How important are each of the following in contributing to your overall health?

Extremely/Very Important



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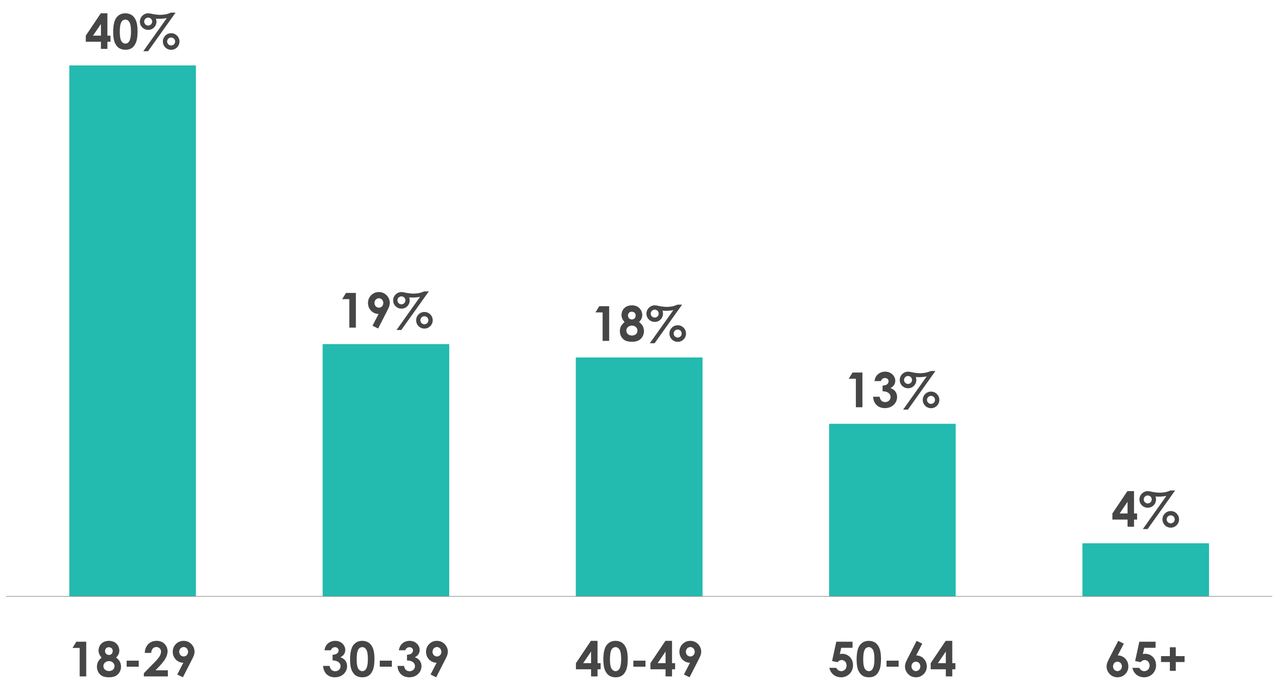
Poor overall mental/emotional health

Personally affected by



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BIG BRANDS LOSING TRUST

Big brands continue losing ground to smaller, niche brands in many areas, including trust, and the importance of transparency as a brand driver is up 11 points since 2020. Consumers want to connect with the brands they choose.

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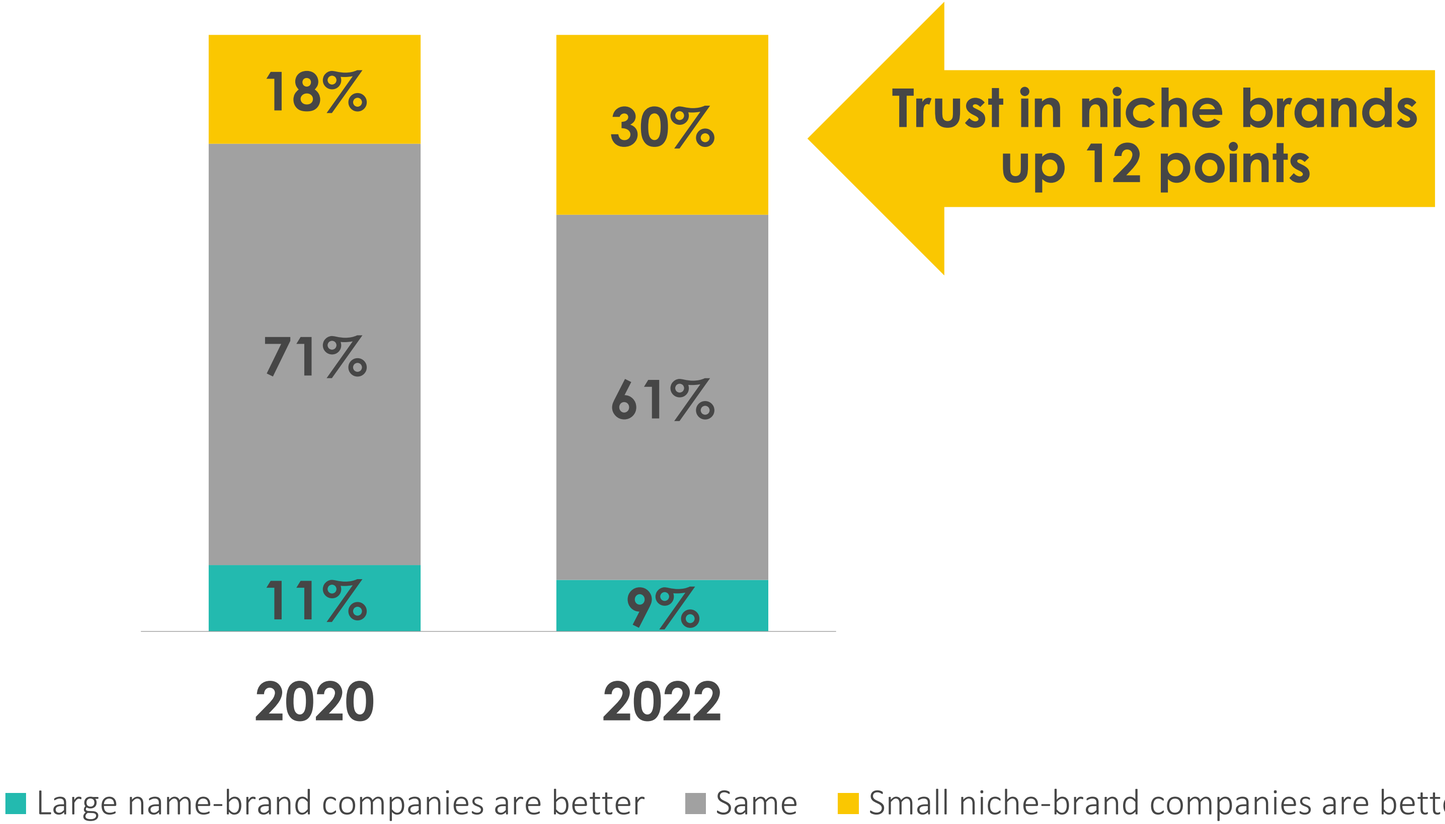
In general, how do you feel about large, name-brand companies vs. small, niche-brand companies in terms of being more trustworthy?



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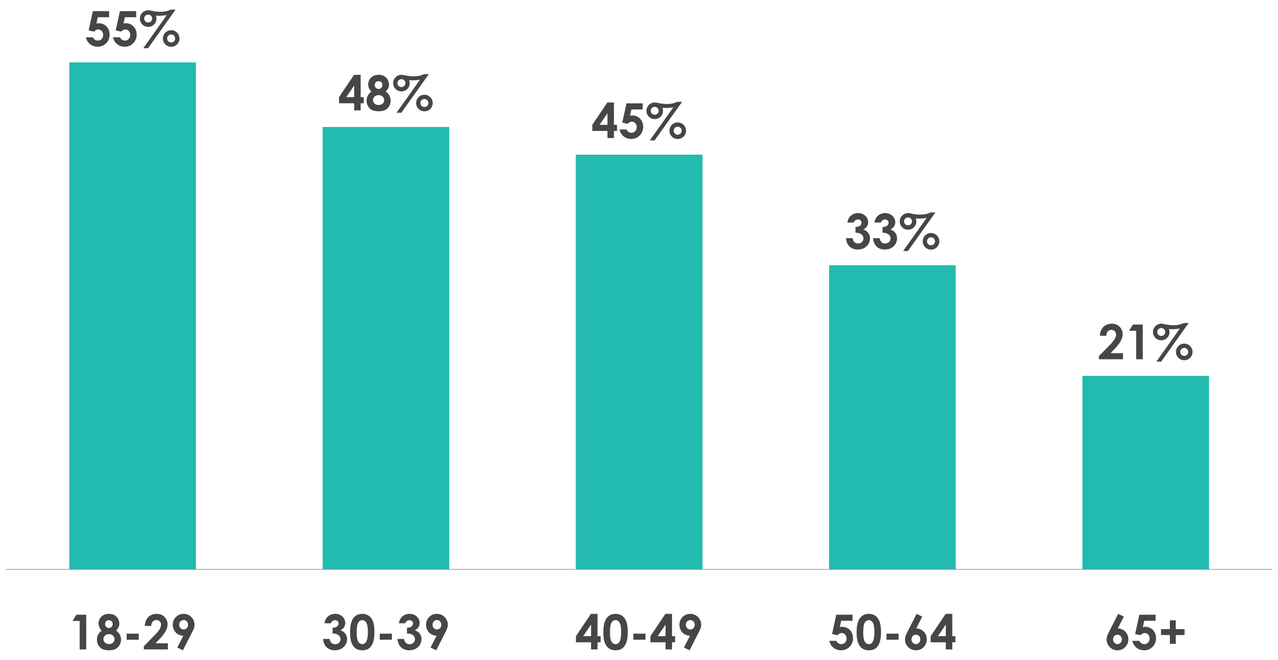
I am interested in learning about the story behind the brands I choose

Strongly Agree/Agree



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INFORMATION OVERLOAD

Consumers have more access to health and wellness information than ever before, yet they feel less confident and confused about what they should eat to stay healthy. While older shoppers look to medical experts for their health & wellness information, young consumers are more likely to trust online sources and social media.

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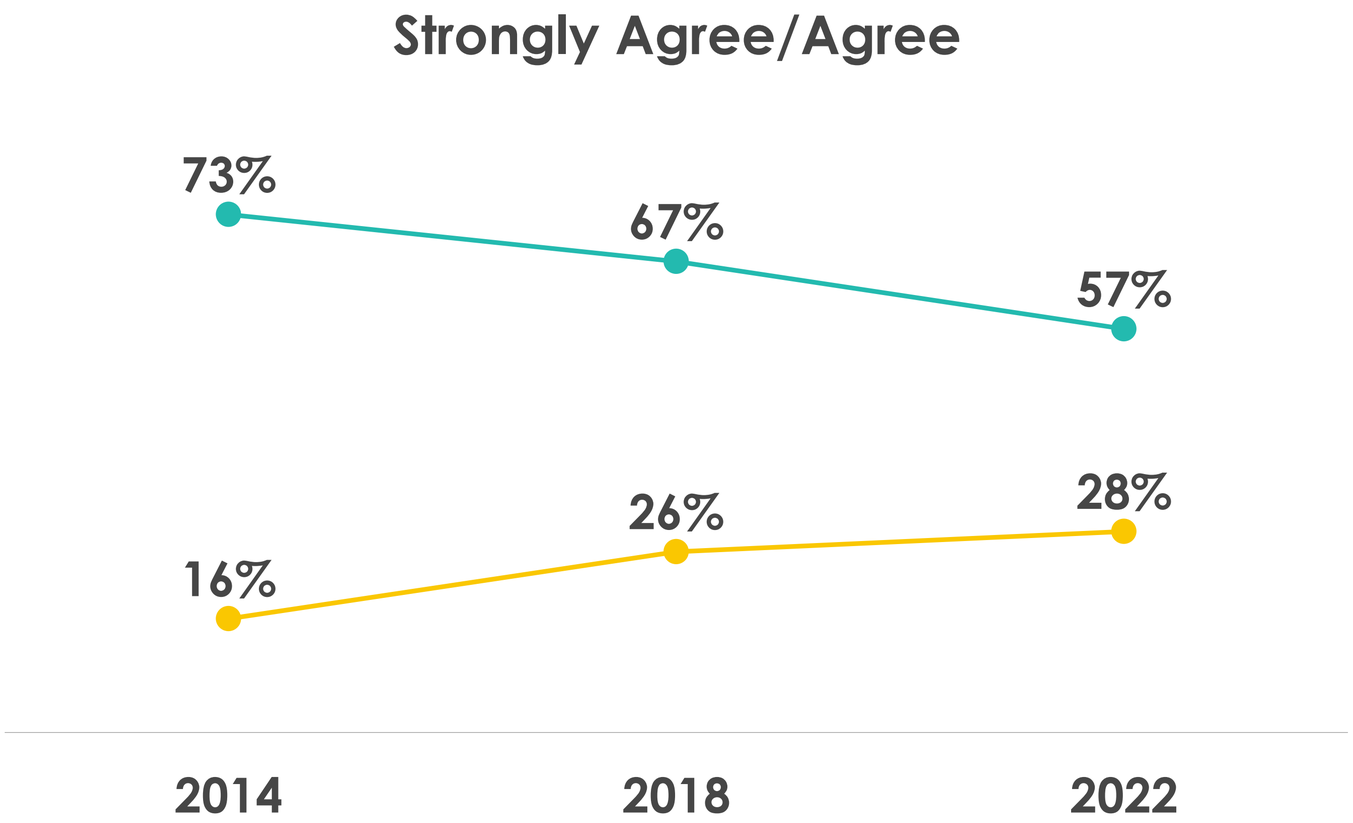

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Data Source: HealthFocus 2023 USA Trend Report— *Shoppers' Journey Towards Living & Eating Healthier*

Young Consumers Differ in Health and Wellness Sources They Trust	
From which of the following do you receive the most useful health and nutrition information?	**18-29 year olds vs. 65+** (Percentage Point Difference)
Social media (e.g., Facebook, Instagram)	+35 pts
Online sources	+15 pts
Food/Beverage companies (e.g., product labels/SmartLabel, company websites)	+9 pts
Friends/Relatives	+9 pts
Television	-
Print sources (e.g., magazines, newspapers, books)	-17 pts
Medical experts (e.g., doctor, registered dietitian)	-29 pts

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Data Source: HealthFocus 2023 USA Trend Report— *Shoppers' Journey Towards Living & Eating Healthier*

WEIGHT-LOSS GOALS SHIFT

While rates of obesity/overweight have remained steady, USA consumers are becoming less focused on weight loss. Their objectives have also changed. Weight management is now more about feeling good than looking good.

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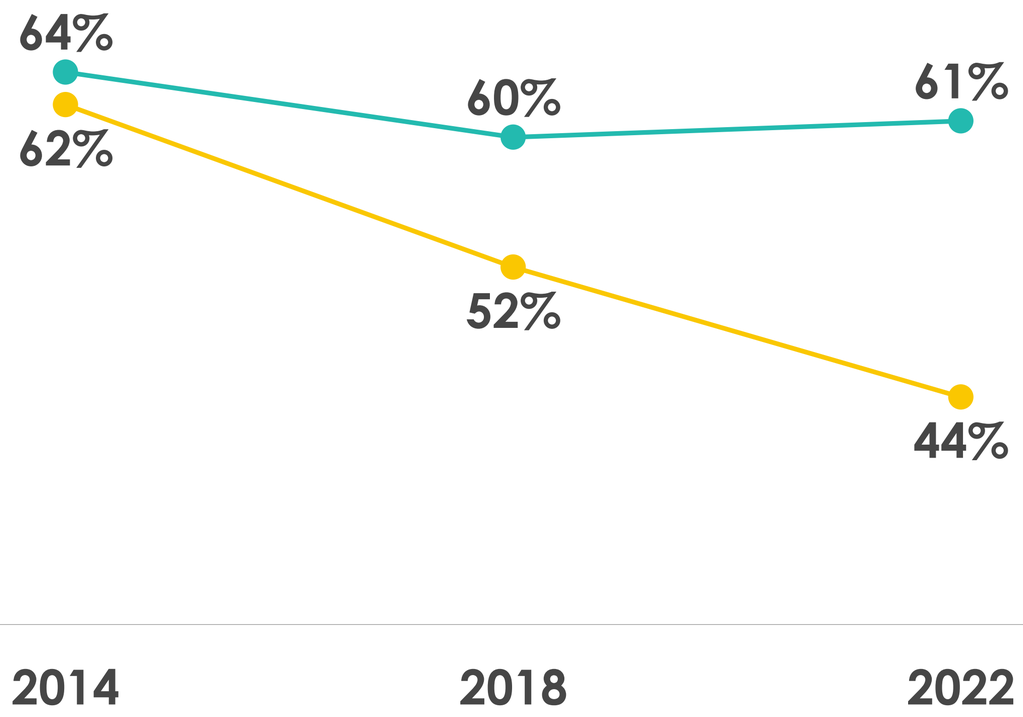

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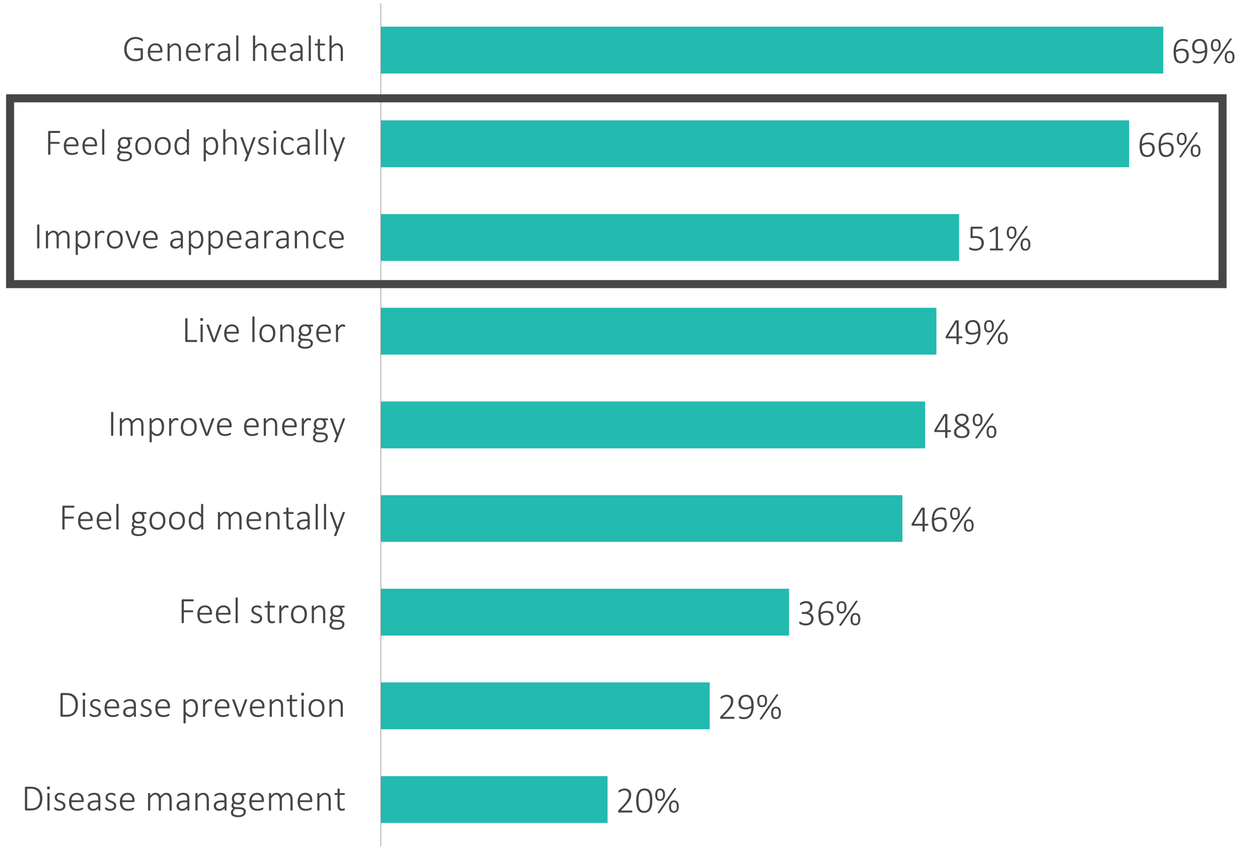
What are your primary objectives when managing your weight?

Base: Interested in weight management



Consumers prioritize feeling good over appearance

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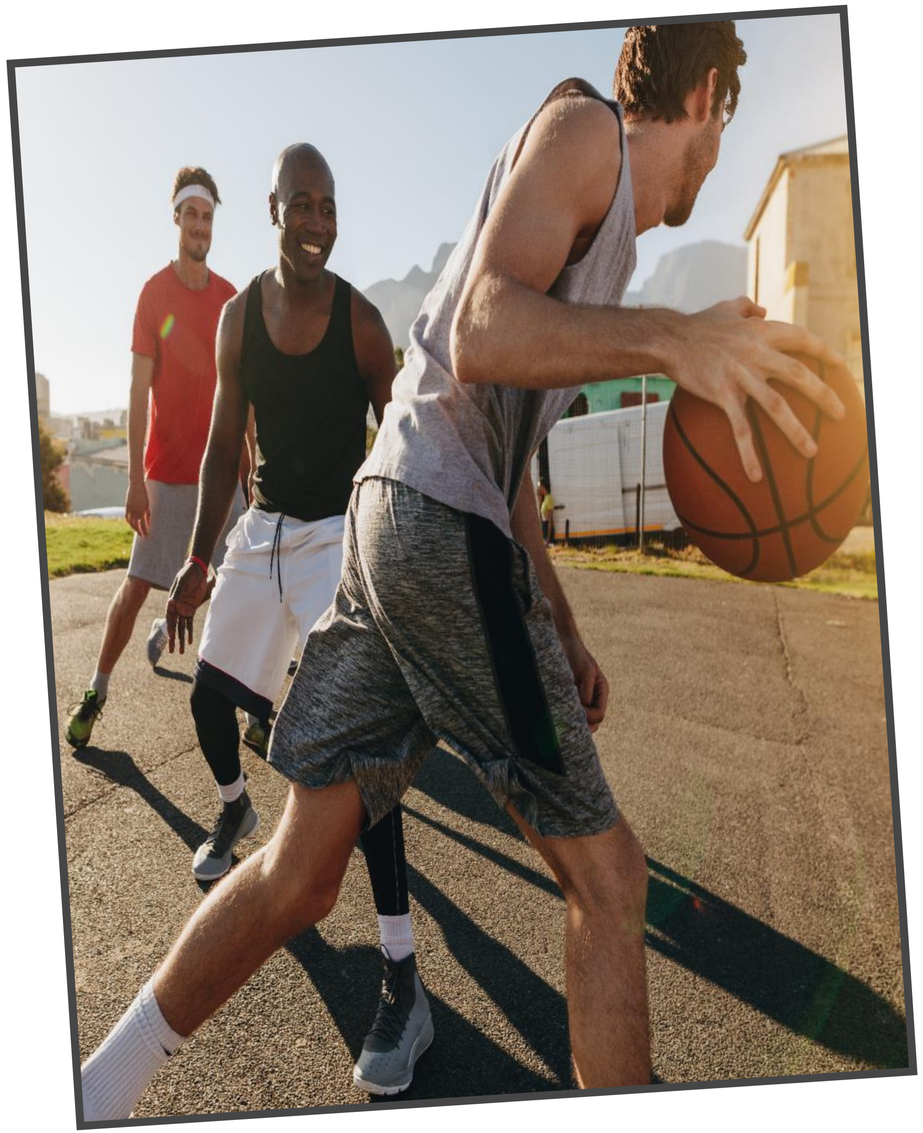
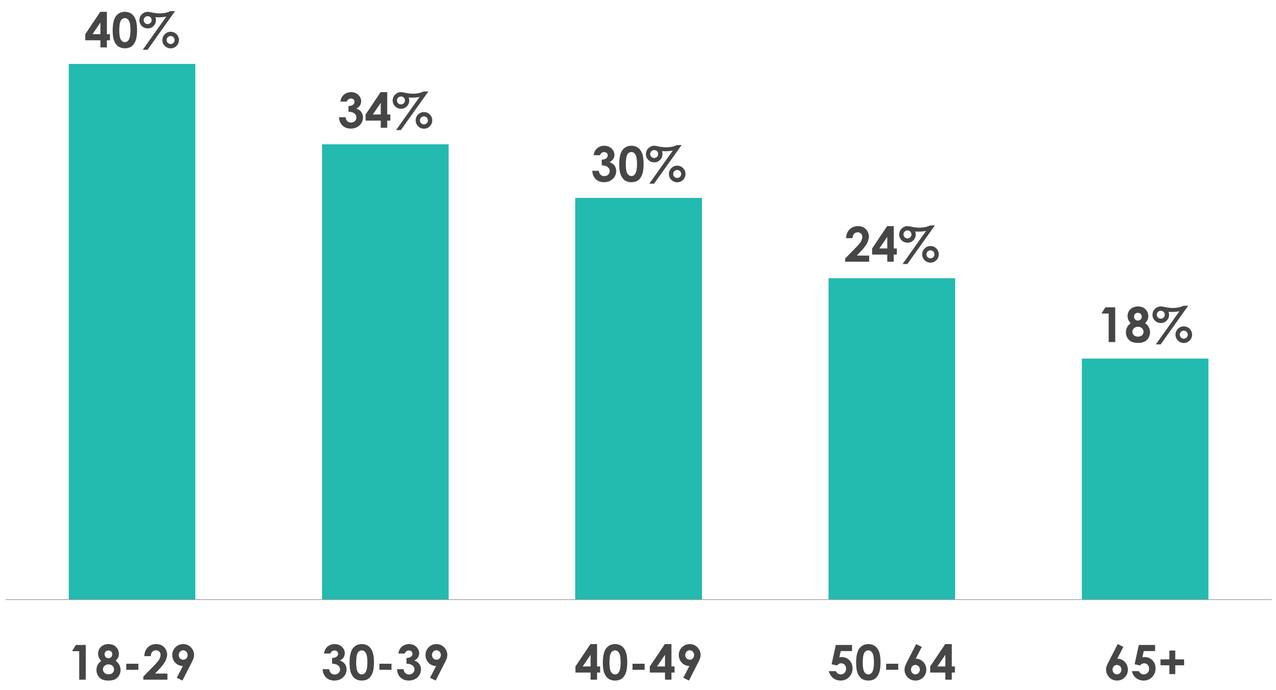
OPPORTUNITIES IN EXERCISE

Mindsets are changing around exercise thanks to younger consumers. Compared to others, they are far less interested in exercise for weight management, endurance, longevity, and general health – instead focusing on improved mood and socializing with friends.



Became more physically active over the last two years



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Data Source: HealthFocus 2023 USA Trend Report— *Shoppers' Journey Towards Living & Eating Healthier*

Younger Consumers Have Unique Exercise Goals

What are your primary objectives when you exercise? (Base: Respondents who exercise at least once a week)	18-29 year olds vs. Total (Percentage Point Difference)
Improve mood	+11 pts
Socialize/spend time with friends	+4 pts
Prevent/Manage Disease	-
Build muscle	-1 pts
Improve aerobic fitness	-7 pts
Build strength	-8 pts
General health	-11 pts
Live longer	-11 pts
Improve endurance	-11 pts
Manage weight	-17 pts

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Data Source: HealthFocus 2023 USA Trend Report— *Shoppers' Journey Towards Living & Eating Healthier*

EXPLORATION ON THE RISE

Young shoppers are driving food and beverage exploration. They're less settled into shopping and eating habits than their older counterparts and are enthusiastic about all aspects of food and beverage. They want to try everything, are excited about benefits, and claim nearly all food factors as important to them, from production methods to ingredients to function.

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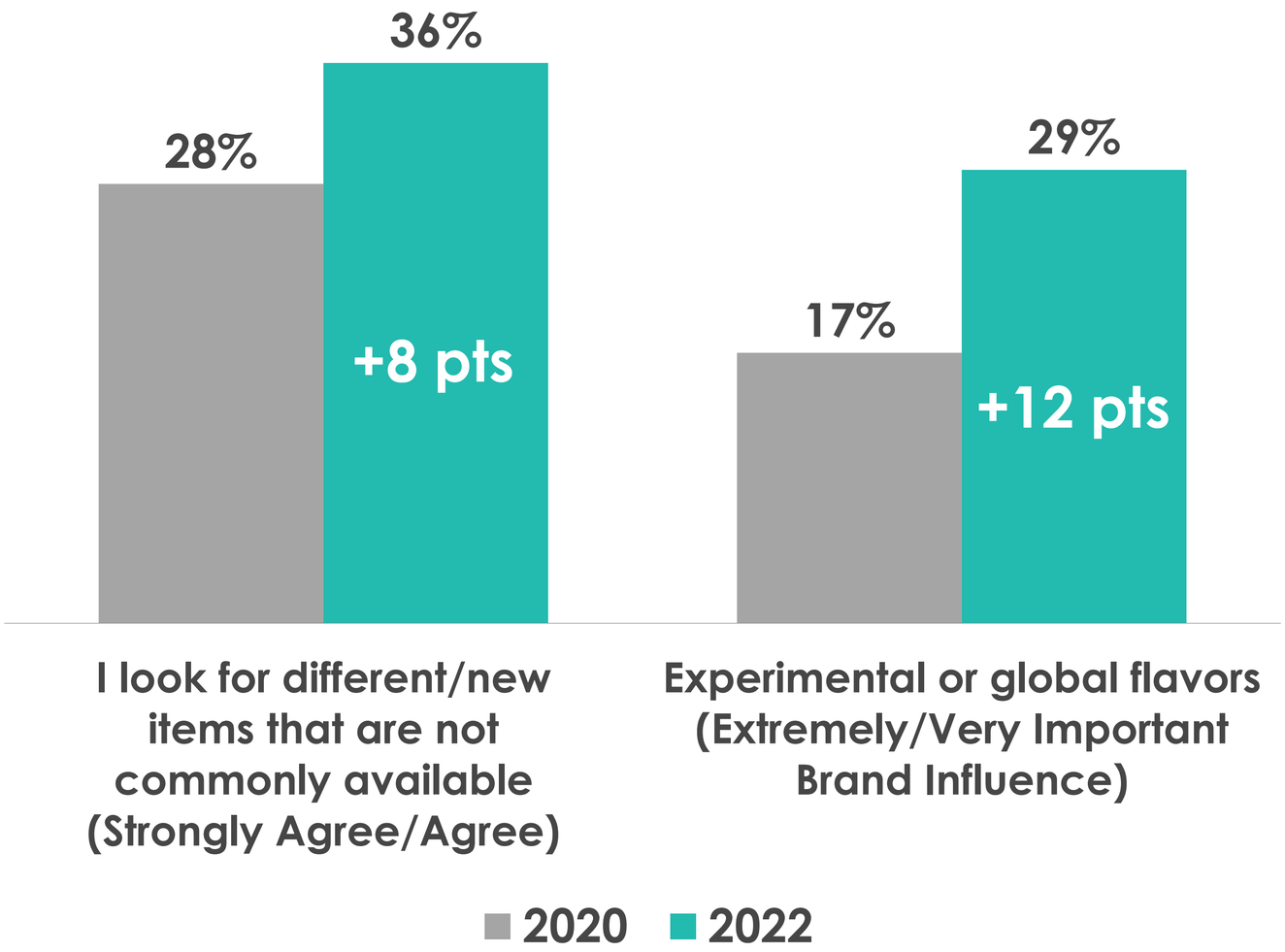

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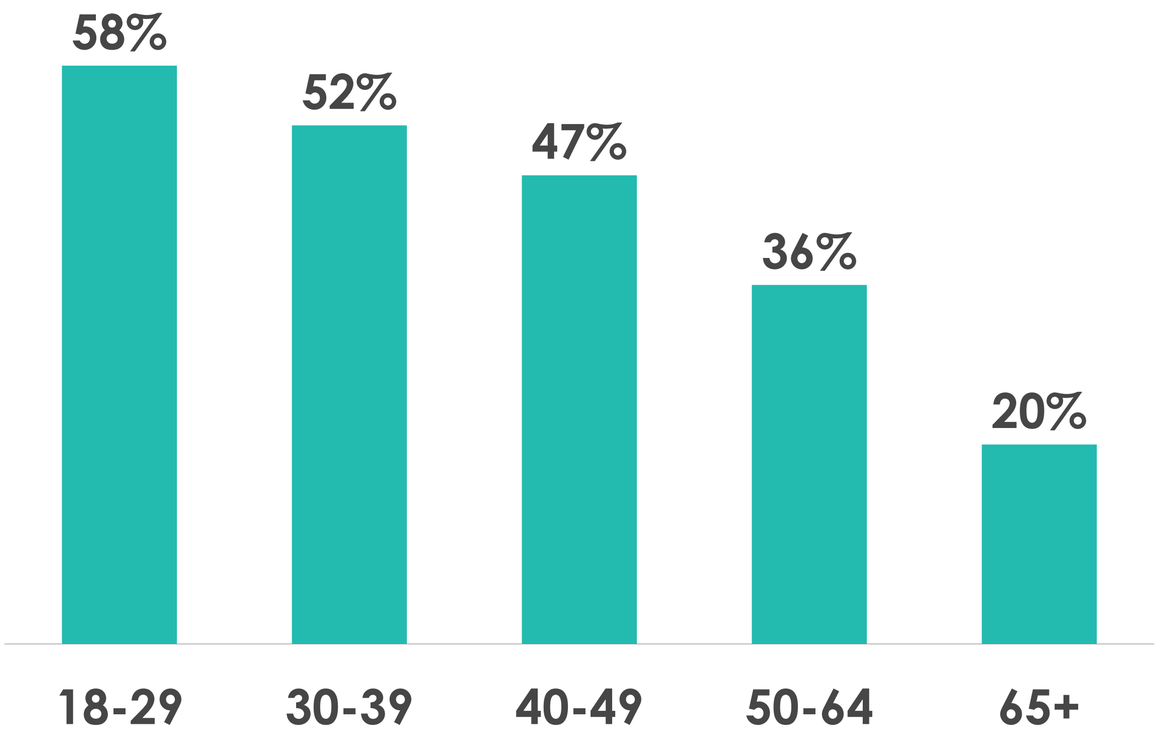
How important is experimentation/trying new things in your food and beverage choices?

Extremely/Very Important



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FUNCTIONAL FOODS

Consumers look to foods and beverages to fuel their day, providing benefits far beyond basic nutrition. They seek out foods and beverages that provide benefits related to general health, weight and satiety, energy and performance, better digestion, specific medical purposes, and mental/emotional health.

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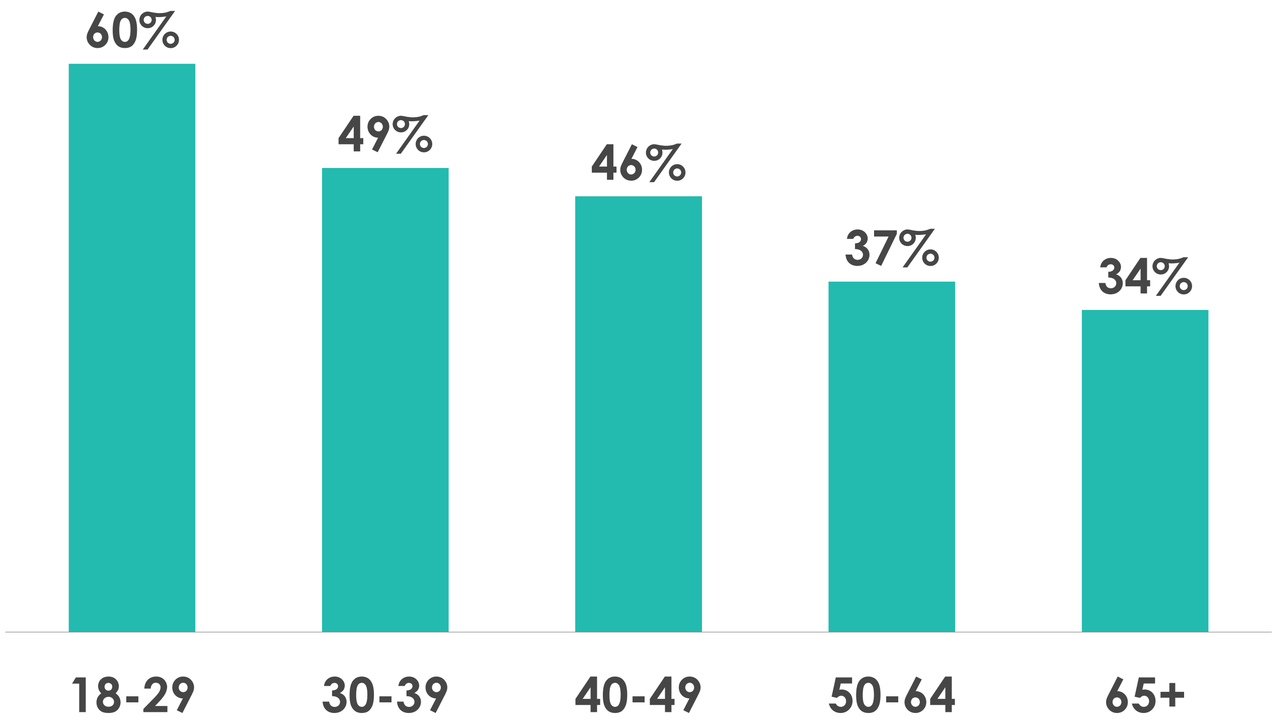
Interest in functional foods/beverages (i.e., provides a health benefit beyond nutrition)

Extremely/Very Interested



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Top 10 Functional Benefits Consumers Want Always/Usually choose foods/beverages…	
#1	to improve my general physical health
#2	for heart health
#3	to keep me feeling full longer so I don't get hungry
#4	to manage my weight
#5	for healthy and strong bones
#6	to improve/increase my energy level
#7	to improve digestion
#8	to improve my overall daily performance
#9	for specific medical purposes
#10	to improve my overall mental/emotional health

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EMBRACING SUPPLEMENTS

General supplement use continues to rise, and we're seeing gains in multiple supplement categories, including immunity/disease prevention, specific benefits, and whole-food supplements. One reason? Belief in the effectiveness and safety of supplements grew significantly over the past 2 years.

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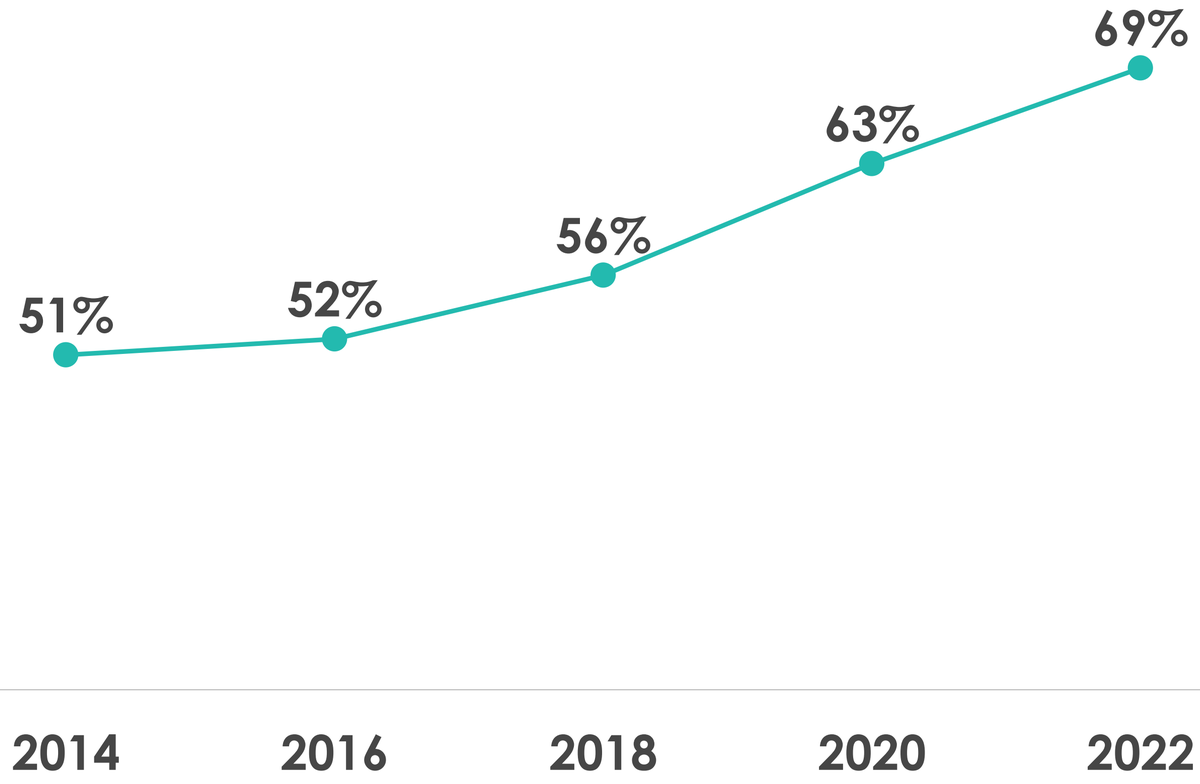
Use of Vitamin/Mineral/Supplements for general health (e.g., One-A-Day, Centrum)

Usage: Once a week or more



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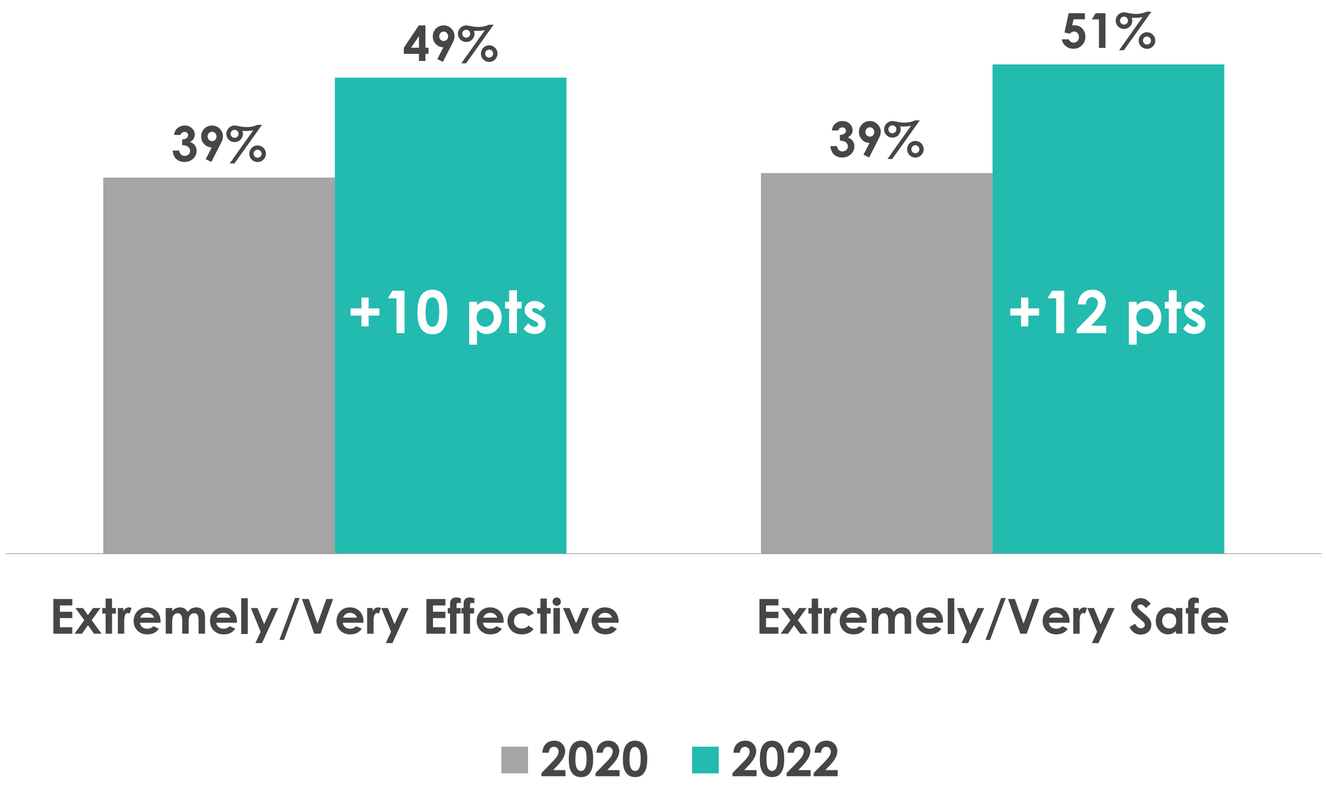
How effective/safe are supplements in maintaining good health/preventing health issues?



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THE PLANT PARADOX

Plant-based foods and beverages have boomed in the past years. With this influx of new products comes some skepticism about whether manufacturers are meeting all the criteria shoppers expect from plant. While interested in plant, most consumers don't view plant-based products as healthier or more sustainable.

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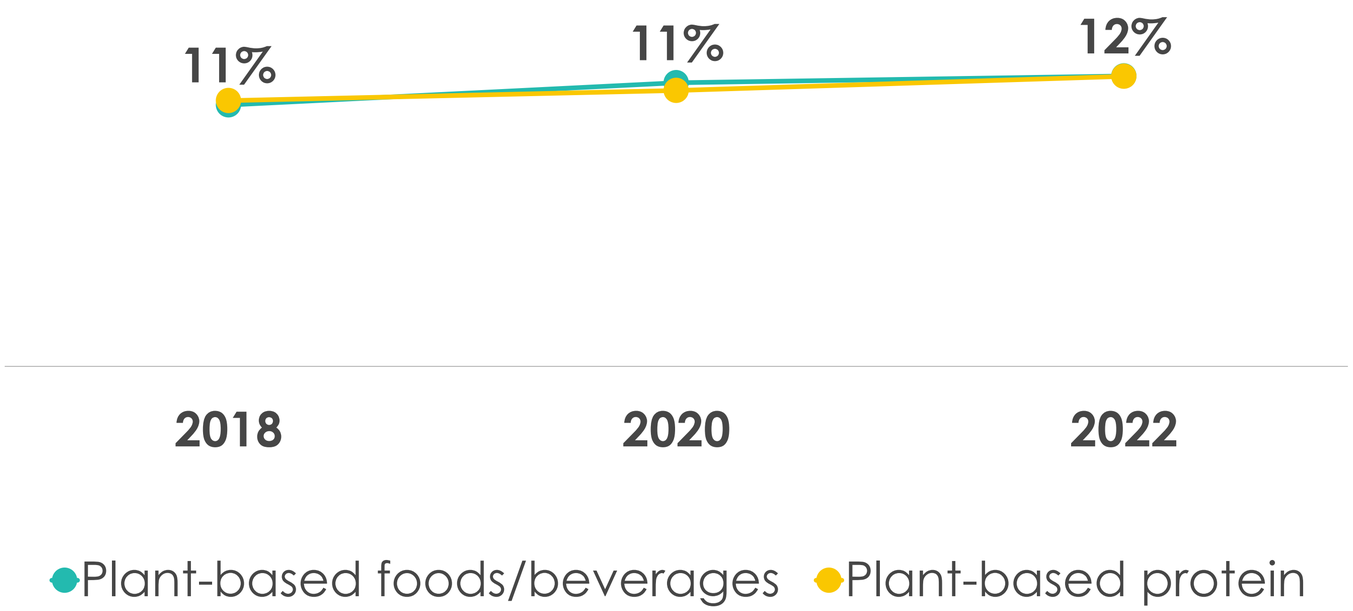
Plant-based Product Uptake Remains Flat

Increased use in the past 2 years



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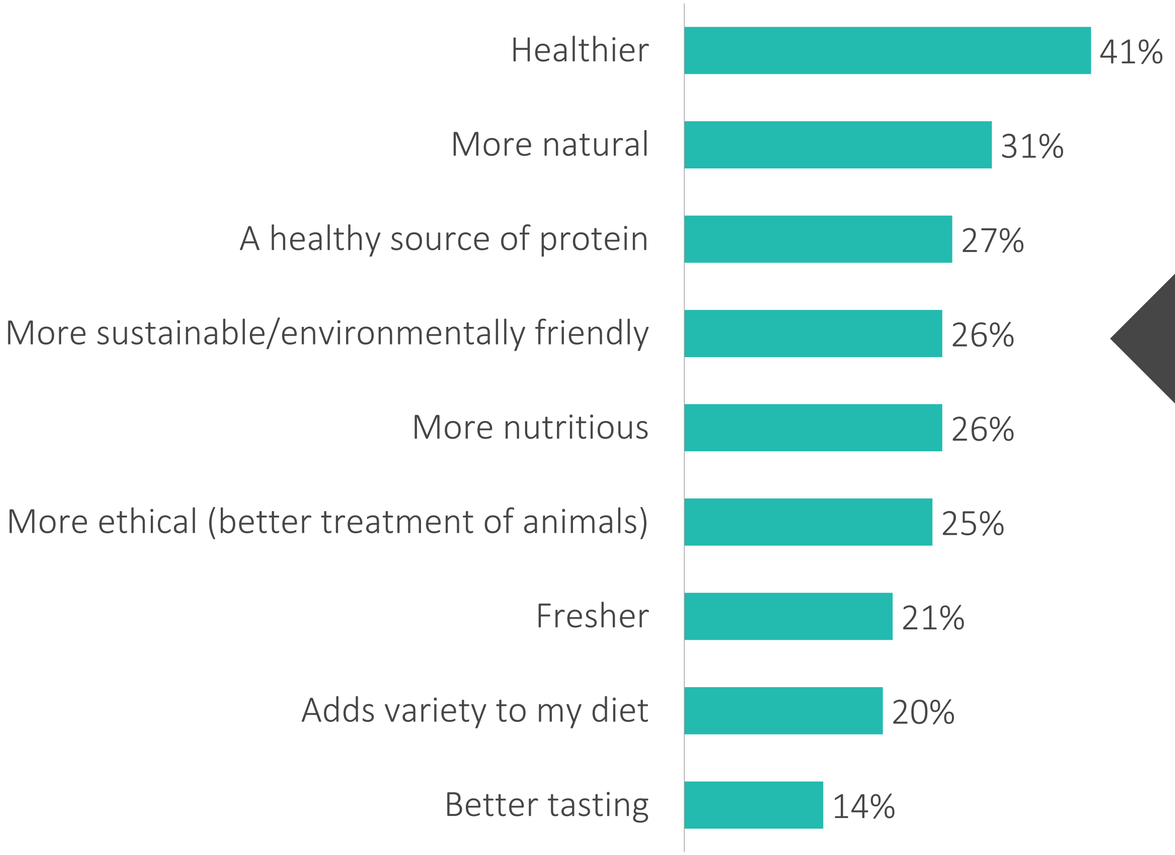
Which of the following do you associate with plant-based products?



Most consumers don't connect plant products with the touted key benefits (e.g., health, sustainability and animal welfare)

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HEALTHY PLANET, HEALTHY ME

Younger consumers are fueling a shift in how we think about sustainability, believing it's critical for personal health. 57% of younger consumers say "for a food/beverage to be healthy, it must be healthy for both myself and the environment."

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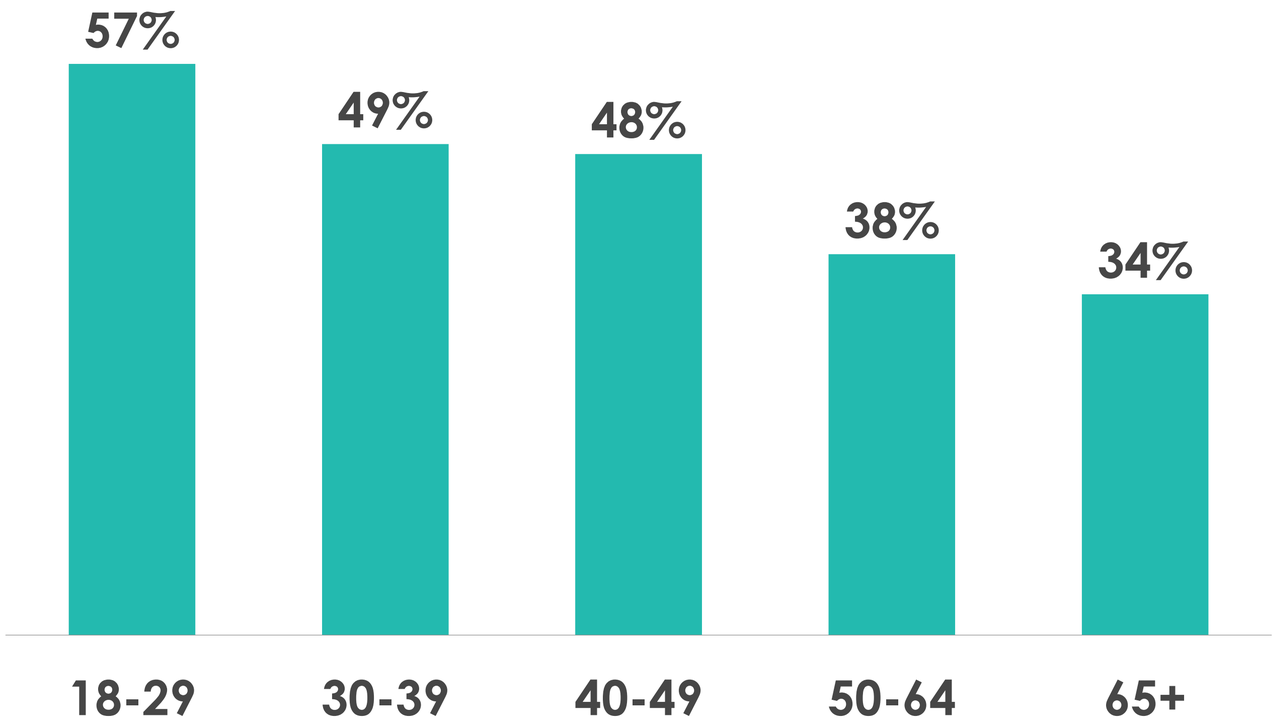
For a food/beverage to be healthy, it must be healthy for both myself and the environment

Strongly Agree/Agree



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Top 10 Environmental Concerns Extremely/Very Concerned	
#1	Pollution (e.g., air, water, land)
#2	Chemicals/Toxins/Heavy metals in the food supply
#3	Plastic waste
#4	Water shortages
#5	Climate change
#6	Food waste
#7	Food shortages
#8	Microplastics in foods and beverages
#9	Overly engineered foods
#10	The treatment of animals in the food supply

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WANT TO LEARN MORE? CHECK OUT THE 2023 USA TREND REPORT: **SHOPPERS' JOURNEY TOWARDS LIVING & EATING HEALTHIER**

With the primary goal of helping companies and brands connect more powerfully with their consumers, the HealthFocus U.S. Trend Study tracks perceptions, motivations, and behaviors around health, nutrition, and food choice.

For 30 years, we've tracked the evolution of consumer interest and involvement in hundreds of topics. In addition to long-trended topics, we tailor each round of the study to gain understanding of emerging trends and consumer involvement.

Get crystal clear on how to approach your US consumers with the most current and comprehensive view of the marketplace.

Find out more about these and other topics:*

- Kitchen medicine and functional foods
- Increased consumer focus on mental wellbeing
- Big brand/small brand perceptions
- Sustainability, food sourcing, and the environment
- How higher food costs change consumer habits
- Boosted beverages
- The shift in energy needs
- Plant-based eating habits
- Transparency, clean eating, and food science & technology
- Parenting and children's health
- Front-of-pack labeling and most important label claims
- Changing attitudes on weight management
- Drivers of food and beverage choice
- Top ingredients of interest and categories most used
- Most desired benefits from foods and beverages
- The evolution of snacking

*Inquire for complete content list

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HealthFocus International is known for challenging the current paradigm. We look forward to partnering with your team to make our data actionable for you, and provide meaningful insights to boost your success. For more information, contact us at info@healthfocus.com.

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