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1

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From a PANdemic to a MINDemic

Understanding consumers' needs and motivating benefits to develop better targeted innovation in Stress and Mental-Wellbeing

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2

Part 1:

What are the consumers needs?



→ Actions they take

3

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What is mental health to you?

"A state of mental well-being that enables me to cope with daily stresses during work or personal life."

"Being able to contribute in a 'normal' daily life routine."

"Feeling good about yourself and about your daily performance."

"Mainly controlling my emotional health during work. I can get really stressed during deadlines."



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How do you avoid stress with mental wellness solution?

"I try to go to the gym 2 times a week and sleep early."

"Plan in some me-time with a Netflix serie, some tea or by just sleeping early."

"Sleep early or go to the gym."

"I try to go for a walk during the lunch-break. It clears my head a bit."



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Do you use food, beverages or supplements to improve your mental health?

"Not really. I do try to avoid caffeine in the evenings, so therefore I drink tea without caffeine."

"I drink herbal tea. Every once in a while I use melatonin before I go to sleep, but only when I'm a bit stressed or when I have a really important day ahead."

"No, only omega-3 and B12 to compromise my vegetarian diet."

"I take CBD and omega-3 supplements."




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Product Experience Vs Efficacy + Convenience

<p>Product Experience more important for younger generations</p> <ul style="list-style-type: none"> Millennials and Gen Z are gravitating towards drinks and powders that provide a satisfying flavor experience with an instant feeling of wellness. For Millennials and Gen Z, work-related stress and busy social lives are key drivers. These cohorts will often be keen to find something that gives them a buzz for social occasions or helps to calm them down in stressful situations. 	<p>Efficacy & Convenience for Baby Boomers & Gen X</p> <ul style="list-style-type: none"> Baby boomers and Gen X prefer the ease of solid dose forms. Older generations are more likely to be concerned about helping to boost and maintain their cognitive function at a point in life when it often declines.
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Source: Mintel Reports

7

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The Evolution of Mental-Wellbeing

<p>TREND #1 Mental Health: Stress & Anxiety From stigmatized taboo to prioritized wellbeing</p>	
<p>The normalization of using supplements to support mental well-being, particularly in the management of stress and anxiety.</p> <ul style="list-style-type: none"> 49% of US consumers reported experiencing stress in the past year, while 38% experienced anxiety, 22% dealt with mental exhaustion, and 20% felt burnout. Paradigm shift as people recognize the importance of taking a holistic approach to mental wellness. Increasing awareness and acceptance of the use of dietary supplements as an effective way to manage stress and anxiety. 	
<p><i>Upcoming Ingredients: Adaptogens combined with key vitamins & minerals or ashwagandha</i></p>	<p style="text-align: right; font-size: small;">Source: HMT Insights</p>

8

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The Evolution of Mental-Wellbeing

<p>TREND #2 Immunity Plus</p>	
<ul style="list-style-type: none"> Consumers have a greater understanding of how interconnected immunity is to our stress levels and quality of sleep. Consumers are now seeking supplements that provide multiple benefits, such as immunity + sleep, immunity + energy, immunity + stress management. 	
<p><i>"Consumers have a greater understanding of how interconnected immunity is to our stress levels and quality of sleep."</i></p>	<p style="text-align: right; font-size: small;">Source: HMT Insights</p>

9

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The Evolution of Mental-Wellbeing

TREND #3 Sleep Better

Consumers seek effective solutions to enhance their sleep quality as individuals prioritize their overall well-being.

- 50% of American people are considering improved sleep as their top mental health goal of 2021.
- Interest in innovative formulations with herbal and adaptogenic ingredients, as well as personalized solutions in convenient formats.
- Products with dual health benefits will continue to drive consumer interest e.g. OLLY recently launched Muscle Recovery Sleep.

"A shift in mindset has led to a surge demand for sleep-related dietary supplements that are specifically formulated to support better sleep, promote relaxation, and optimize overall sleep health."



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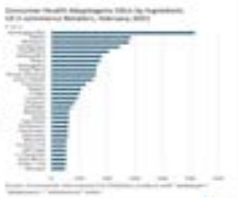
10

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Rising interest in Adaptogenic ingredients

Ashwagandha followed by mushrooms

- Ashwagandha is the clear adaptogen leader
- Mushrooms: represented 20% of all ingredients used in this category in the US market → dominates the adjacent hot drinks landscape
- Asian herbal traditional ingredients dominate the US marketplace for adaptogenic supplements
- Adaptogenic are up an coming as ingredients to cope with mental health and towards sleep enhancement



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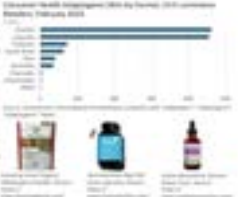
11

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Powder & Capsules are popular

Adaptogenic Supplement Formats

- Powder and capsules dominate the market (83% of the SKUs on US e-commerce retailers in 2023)
- Powder formats and supplements are popular: consumers of adaptogenic products want to incorporate it into beverages that meet their needs for on-the-go functionality and active nutrition



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12

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Nootropics associated with cognitive efficacy

<p>Nootropics Ingredients</p> <ul style="list-style-type: none"> Older adults tend to buy them for memory function and mitochondrial health Younger, healthy adults may buy them for boosting energy, focus, and stress relief 	
<p>Top 5 Nootropics</p> <ol style="list-style-type: none"> 1: L-Theanine 2: Caffeine 3: Bacopa 4: Morniani 5: Citicoline 	

Source: Nutrition.com

13

Part 2:

Consumer: There is not one size fits all

→ Develop targeted innovation

14


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You can group consumers by mindset



Consumer segment			
Technology Stakeholder: <i>Fit my condition</i>	Lifestyle Stakeholder: <i>Fit me</i>	Early Mass Stakeholder: <i>Fit my routine</i>	Late Mass Stakeholder: <i>Fit my tradition</i>
Brand Narrative			
Security: <i>"For me it's function before food."</i>	Bonding: <i>"I am my own priority, not staying with a brand."</i>	Pragmatism: <i>"I just want to buy what is best for my kids and for me, but it's a struggle to decide what to buy."</i>	Stability: <i>"I don't need all these promises, I need products that can fit in my everyday life."</i>

Source: McKinsey.com

15

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Technology Stakeholder	
	Needs <ul style="list-style-type: none"> • Payoff in performance • Discipline-specific benefits (eye performance for bikers and gamers, endurance support for marathon runners, etc.) • Supreme concentration • Effective and fast recovery
	Benefits <ul style="list-style-type: none"> • Mental Health Performance • Function before food • Transparency and clinically tested for efficacy • High quality nutrition (bioavailability) • Food safety
<p>Technology stakeholders are on a constant lookout for products that can boost their performance and support them in a sustainable, efficient, and scientifically proven manner.</p> <p><i>"I always felt that my greatest asset was not my physical ability, it was my mental ability."</i></p>	

16

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What solutions would work for them	
Science-Led	
Klean Focus (US)  <p>Helps athletes dial into their mental game and keep it as strong as their physical one.</p> <p>Antioxidants Acetyl-L-Carnitine and Alpha Lipoic Acid provide cognitive support by assisting mitochondrial function and neurotransmitter production.</p> <p>Alpha-GPC helps to protect cellular membranes.</p> <p>Lutein helps support visual acuity, which is key to the body's ability to adapt, process and respond in the moment.</p>	Mind Lab Pro v4.0 (US)  <p>Holistic nootropic with B Vitamins for peak neural function. Includes CDP-Choline, which has been shown to improve awareness.</p> <p>MindLab Pro contains 11 nootropic ingredients backed by research and adaptogens such as Lion's Mane Mushroom and Rhodiola.</p>
US Market	


17

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Lifestyle Stakeholder	
	Needs <ul style="list-style-type: none"> • Nutritional value • Natural ingredients • In control • Feeling calm • Inner strength
	Benefits <ul style="list-style-type: none"> • Natural, Plant-Based ingredients, from herbs to mushrooms • Daily nourishment • Artificially-free • Sustainable • Storytelling • Indulgence & Self-care • Holistic
<p>Lifestyle stakeholders are seeking stress reduction, inner balance, recovery and sleep.</p> <p><i>"My body is my temple and it needs to be treated as one."</i></p>	

18

HIXT	
What solutions would work for them	
Belief & Values	
<p>Mood by Nue Co</p>  <p>Reduce stress and stabilise the mood with Vitamins and Ayurvedic ashwagandha.</p> <p>Supports serotonin production and reduces cortisol (stress) in the body.</p> <p>Monthly rolling subscription</p>	<p>Upraising Mushroom Coffee</p>  <p>Daily coffee with functional mushrooms. Nootropic, adaptogens and functional mushrooms that have important potential benefits for physical and mental health, well-being and stress management.</p> <p>Green Coffee Beans + Reishi + L-Theanine + 5-HTP</p> <p>Certified Fair Trade & Organic (US&USDA). Recyclable packaging.</p>
US & UK	

19

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Early Mass Stakeholder	
 <p>Early Mass Stakeholders want to keep a balanced lifestyle, especially in busy/ stressful times.</p> <p><i>"My health and well-being are interconnected, I would love to have something to cover my overall wellness."</i></p>	<p>Needs</p> <ul style="list-style-type: none"> Managing their mental space A good balance between performance and quality Ability to sleep as a high priority to manage stress levels <p>Benefits</p> <ul style="list-style-type: none"> Mental sharpness/ability to focus Clarity Energy (mental) Calm energy (sustained energy; state of inner peace) Combination (normally multi-vitamin supplements) Easy-to-follow

20

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What solutions would work for them	
Benefit-Led	
<p>Reprise Health</p>  <p>Stress Relief Gummies</p> <p>Traditional 3-herb formula, including Gai, Turmeric and American Ginseng</p> <p>Chinese Medicine in Fruity Gummies, backed by science</p>	<p>Vitapod</p>  <p>Vitapod Energy enhances metabolism & mental performance</p> <p>Immediate cognitive boost that lasts up for 6 hours, without the crash from a typical energy drink. Helps for better focus by increasing alertness, cognition and mental focus.</p> <p>Includes flavonoids & caffeine, stimulating the effect of exercise.</p>
US Market	

21

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Late Mass Market Stakeholder	
	Needs <ul style="list-style-type: none"> No change of habits Healthier soft drink/ vitamin water Less calories/sugar More nutrition
	Benefits <ul style="list-style-type: none"> Cost efficiency Taste/Texture Convenience Feel Good & Positivity
<p>The late Mass Market Stakeholders do not want to change habits. All about taste and convenience.</p> <p><i>"It should be easy to adapt to my everyday life, no fuss, just a good product!"</i></p>	

22

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What solutions would work for them	
Familiarity & Normal	
Callebaut - Mood Chocolate  <p>Bite-size chocolate with their own color and filling based on specific ingredients to boost the mood of the consumer.</p> <p>Yellow-colored brightens your day, with fresh lemon and vitamin C for a cheerful mood.</p>	RECESS Mocktail  <p>Made with real ingredients: uplifting nootropic ginseng, balancing adaptogens L-theanine and lemon balm.</p>
Europe & US market	

23

Part 3:

How to increase the trust factor?

→ Think beyond product



24

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From Supplement Only to Product and Service

- Supplement brands should extend the benefits of only-supplements by partnering with service or tech based innovators
- Technology allows consumers to track patterns. The use of smartwatches, wearable devices, and sleep-tracking apps has provided individuals with valuable insights into their sleep quality, duration, and disturbances.
- Consumers are actively seeking dietary supplements that can complement their sleep monitoring efforts and provide targeted support to optimize their sleep experience.



HEALTHY, SHARON PETERSON

About one-in-five Americans use a smart watch or fitness tracker

Respondents aged 25-35 are most likely to want personalized food, drinks & supplements going forward.





Source: HIXT report

25

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Trend Expression

How the trend is expressed in the market

<p>HUM Nutrition</p> 	<p>HUM Nutrition is a supplement supplier that offers a quiz to find out which vitamins is right for you.</p> 	<p>Headspace</p> 	<p>Science-backed meditation and mindfulness tools, helping to create life-changing habits to support mental health.</p> <p>Proven to reduce stress by 14%</p> 
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US & UK Markets

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26

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Comprehensive blood tests and lifestyle diagnostics

LOEWI creates tailored food supplements that include the necessary vitamins, minerals and vital substances specific to the consumer, based on high-quality blood diagnostics and lifestyle data.

Personal goals, allergies, medications and illness are taken into account and create a dietary plan that can reduce the need for medication and health interventions.




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Source: Nutrition report

"Personalized nutrition should not only be for athletes but should be available for everyone who strives for optimal health. Through the unique combination of science and technology, we are able to make personalized nutrition accessible for everyone!"

27

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Conclusion	
	<p>1. There is no miracle product: it's a combination of sleep, physical activity and nutrition.</p>
	<p>2. There is a growing interest in natural, herbal and adaptogenic ingredients.</p>
	<p>3. Key opportunity is in the increasing availability of technologies that allow consumers to track their patterns, provide personalised diagnostics and improve overall mental-wellbeing.</p>
