

A woman with a ponytail, wearing a black sports bra, grey leggings, and a climbing harness, is climbing a wooden rock wall. The wall is orange and red with various colored climbing holds. A blue semi-transparent box with white text is overlaid on the right side of the image.

MILLENNIALS + WELLNESS

TREND INSIGHT: THE NEW HEALTH HORIZON

It's the biggest movement to hit food & beverage, and the largest generation in the U.S. We're talking about Health & Wellness, and the ways in which Millennials (those born 1977-1994) in particular are shaping it. FONA recently commissioned a national survey that provided insight into this important consumer segment and their attitudes toward wellness. From the need for individual identity (as opposed to fad dieting); to mocktails, sugar reduction, CBD, and personal care – let's look at the opportunities around Millennials & what we call the New Health Horizon.

PERSONALIZATION, PERSONAL GOALS + PERSONAL RESTRAINT



It's pervasive in every segment and every macro-trend across food & beverage. A nearly universal theme across all segments

of consumer: the quest for health & wellness. On social media, conversations about health & wellness have reached their highest volume in 5 years, according to Infegy. The number of posts on the topic will approach 200,000 in 2020. Health and wellness are now top priorities for consumers as they have more

choices and awareness to hack their health. Whether it's improving physical fitness, eating more nutritiously, or addressing mental health, people keep wellness topics top-of-mind.

Younger Millennials are particularly wellness focused. Says Iconoculture: "Forgoing the recklessness that typically defined young adulthood for prior generations, Younger Millennials are exercising self-control in the here and now, with an eye toward a healthy future. And rather than languish in this staid approach, Younger Millennials associate "adulting" with anticipation and pride as they crave a sense of stability and control."



HEALTH & WELLNESS POSTS WILL APPROACH 200,000 IN 2020... THE HIGHEST VOLUME IN FIVE YEARS.

OUR NEW RESEARCH SHOWS THAT FOR MILLENNIALS, HEALTH AND WELLNESS:

- is not always about staying on a specific diet plan long-term
- is no longer defined by weight loss alone
- is a personal and individualized proposition
- is about the whole self — including mental health & self-care



Millennials' highly individualized identity makes it hard for marketers to connect with this large, varied cohort, as Millennials reject attempts to attach labels to their sense of self.

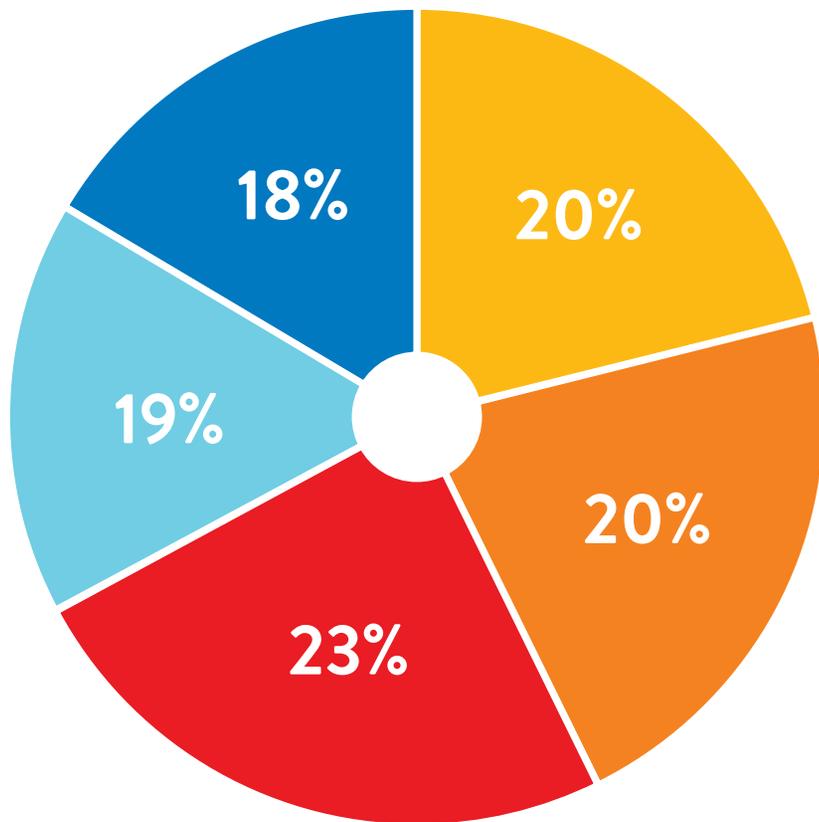
- ICONOCULTURE

PAVING A NEW FUTURE

Millennials in particular are creating a new future for wellness, with a focus on personalized nutrition, mental health & the flexibility to “change it up” now and again. About 23% of consumers FONA polled agreed with the statement: “I go back and forth when it comes to diets. I try dieting now and then to change the way I eat, but it doesn’t last forever.”

Zero respondents said that they eat food for pleasure with little thought to health.

WELLNESS ACCORDING TO MILLENNIALS



- "I'm constantly on the quest for new ways of eating or diets. I'm interested in new things and open to new ideas."
- "I've been directed by my doctor or have a health condition that has required me to eat a certain way or maintain a certain diet."
- "I'm the anti-dieter and I eat in moderation for overall health & wellness. I don't follow any specific plans or ways of eating."
- "I go back and forth when it comes to diets. I try dieting now and then to change the way I eat, but it doesn't last forever."
- "I'm very restrictive with what I eat. I only eat certain foods and/or avoid others (i.e. dairy, carbs, etc.) I have very specific health and wellness goals that I am trying to achieve or maintain."

FORGING THEIR OWN PATH

Mintel puts it this way: “The days of blockbuster diets are over. The diets of the future will be more tailored to fit an individual’s needs, preferences and health goals. Instead of chasing the next fad diet, focus on developing **products that align with consumers’ overall health and wellness goals.**”

Our research confirms this point, particularly for Millennials. About 40% of consumers we polled are interested in trying “Intuitive Eating,” – literally eating according to your individual needs. IntuitiveEating.org lists 10 principles of the concept, including “rejecting the diet mentality,” making peace with food, and rejecting the notion that you are “good or bad” based on what you consume.

A similar percentage shows an interest in plant-based, which in and of itself is something with profound flexibility and reach. Once a magnet for only vegans and vegetarians, plant-based positioning now has widespread interest – and in fact, FONA made the [case](#) earlier this year that plant-based isn’t a trend, but a permanent consumer shift. **About 42% of Millennials we polled said they have increased their intake of plant-based food and beverage in the last year.**



INTERESTED IN TRYING:

40%

INTUITIVE EATING

37%

LOW CARB

39%

PLANT-BASED

30%

INTERMITTENT FASTING

WEIGHT LOSS LOSING SOME WEIGHT

For Millennials, wellness is no longer synonymous with weight loss. That's not to say there is no interest in weight loss – it is still a topic of some interest. But focus on weight loss has certainly lost some ground. As we've already mentioned, their goals around health are more about the whole self.

"A holistic approach to health is particularly important to Millennials... Millennials feel that health and wellness incorporates all aspects of their lives from sleep to managing stress to exercise," says Mintel.

Two-thirds of consumers we polled said they've switched their personal approach from a weight-loss focus to a moderation focus. Social media insights reveal similar themes. According to Infegy, the growth of topics **"MINDFULNESS"** (up 109% YOY) and **"FITNESS"** (up 47%) are both outpacing **"DIETING"** (up 25%).



64% OF MILLENNIALS

polled by FONA have changed their personal approach to their diet in the past year by focusing less on weight loss and restrictive measures, and focusing more on eating in moderation to be healthy

BRING THE TASTE, BRING THE FUN

The biggest purchase driver for Millennial consumers is taste, according to our research. What's more – three quarters of those we polled said that seeing a new and exciting flavor can impact their purchase decision. When a new flavor is introduced to a product line they already purchase 77% say they buy the new flavor. Interest in wellness does not decrease the need for food to taste good and be interesting and fun.



When a new flavor is introduced to a product line they already purchase, **77% WILL BUY THE NEW FLAVOR.**



When Millennials see a food or beverage product they've never tried before in a new and exciting flavor, **73% STATE THAT THE FLAVOR INFLUENCES PURCHASE DECISION.**

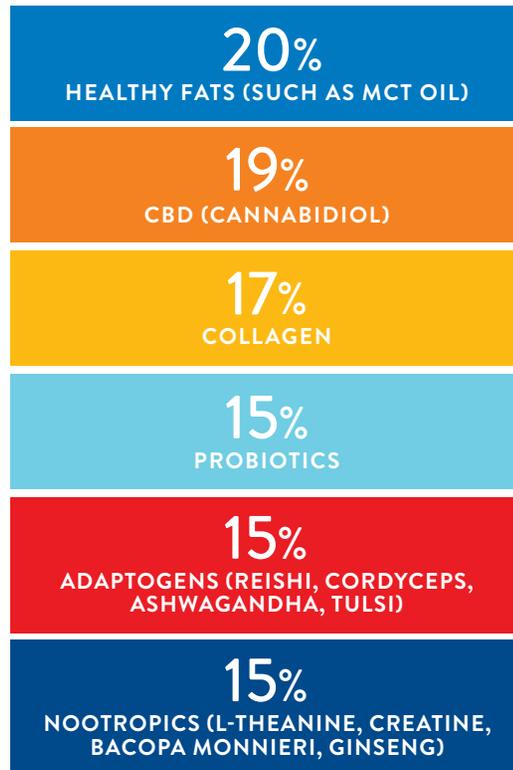


FUNCTION AND FORM

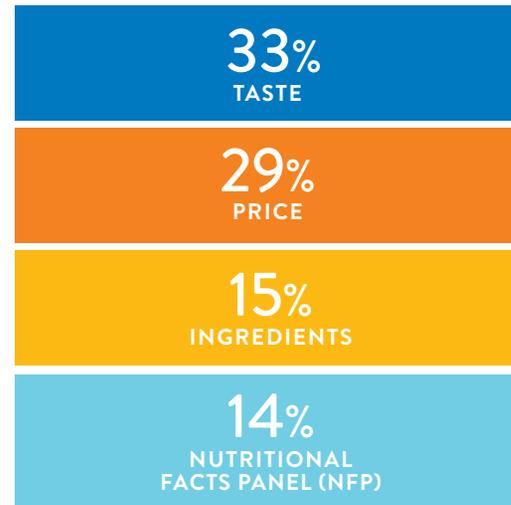
When it comes to functionality, Cannabidiol (CBD), brain-boosting nootropics and healthy fats are of particular interest for Millennial consumers. Where do they want to see these ingredients included? About 33% said they'd like to see CBD in confections. Nearly 30% said they're interested in seeing healthy fats in bars/bites/cookies. Nearly a quarter said Nootropics would be most interesting in beverages.

38% OF MILLENNIAL CONSUMERS polled by FONA are taking a supplement or changing a consumption habit for energy support.

FUNCTIONAL INGREDIENT AWARENESS



BIGGEST INFLUENCERS ON F&B PURCHASE DECISION



SUGAR & ALCOHOL REDUCTION

Reducing added sugar is a concern for Millennials, though they're also opposed to artificial sweeteners. More than half (61%) of those we polled said they've changed their eating habits in order to **reduce added sugars**, and 38% said they've done so to **reduce artificial sweeteners**.

Some signs point to slowed alcohol consumption among Millennials, which may be partially connected to the focus on reducing sugar. According to Mintel, **53% of young Millennials prefer drinking lower or non-alcoholic drinks over standard strength**.

Iconoculture also cites research that says young Millennials consume less alcohol than their forebears. According to the Atlantic piece *Millennials are Sick of Drinking*: "changes in habit often lag behind changes in attitude, and national survey data on drinking habits reflect only small declines in heavy alcohol use."

Brands are taking notice of younger generations' attitude towards alcohol. "Booze-free bars serving elevated "mocktails" are attracting more young people than ever before," according to *Time* magazine.



Health-conscious Millennials are increasingly cutting sugar out of their diets.

- CBINSIGHTS



THE TAKEAWAYS

Although Millennials are not a homogenous group, some clear themes (and opportunities) emerge when you examine their attitudes towards health and wellness. Firstly, “to thine own self be true.” This is a demographic which prioritizes their

individual needs and goals—and they expect brands to do the same. Bring the taste and the flavor innovation, as our research showed strong interest from Millennial consumers. Also consider: Wellness itself is no longer defined by

weight loss alone. Although it is a driver for some, mindfulness and fitness are growing more quickly in terms of interest. Millennials are more likely to seek plant-based options than older generations, revealing great potential for CPG growth in the future.

YOU DESERVE MORE. LET'S GET STARTED.

What does true partnership look like? You deserve a flavor partner ready to turn these trends into the tangible.

Let FONA's market insight and research experts get to work for you. Translate these trends into bold new ideas for your brand. Increase market share and get to your “what's next.” Our technical flavor and product development experts are also at your service to help meet the labeling and flavor profile needs for your products to capitalize on this consumer trend. Let's mesh the complexities of flavor with your brand development, technical requirements and regulatory needs to deliver a complete taste solution.

From concept to manufacturing, we're here for you — every step of the way. Contact our sales service department at 630.578.8600 to request a flavor sample or chat us up at www.fona.com/contact-fona/

SOURCES

- FONA Proprietary Health & Wellness Study, 2019 (FONA Survey info: 18-23: 10% | 24-41: 90% | 60% Male/ 40% Female)
- <https://www.intuitiveeating.org/10-principles-of-intuitive-eating/>
- <https://www.cbinsights.com/research/millennials-killing-industries/>
- <https://www.theatlantic.com/health/archive/2019/04/millennials-sober-sick-of-drinking/586186/>
- <https://www.nielsen.com/us/en/insights/article/2018/assessing-the-reduced-growth-of-the-us-adult-beverage-market/>
- <https://time.com/5668152/mocktails-sober-sobriety-zero-alcohol-free/>
- Mintel
- Iconoculture
- Infegy

