



# The Evolution of the Mental Health Landscape in Consumer Health

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## INTRODUCTION

Key findings

## AN EPIDEMIC OF STRESS

Sources behind the epidemic of stress

Consumers' stress baseline is high; women are more stressed than men

Younger consumers report pronounced effects from stress and anxiety

The centrality of mental health on overall perspectives of health

Younger consumers more active in reducing stress

## THE STATE OF MENTAL HEALTH SUPPLEMENTS

Consumers rate vitamins and dietary supplements highly when addressing mental health

Mood/Relaxing positioned supplements seeing surging growth since COVID-19

Mental health supplements are niche in most markets; global sales led by US and China

Consumers looking for mental health solutions, are not happy with their current approach

Ineffectiveness is the number one reason for consumer migration to other solutions

## MENTAL HEALTH'S ROLE IN OTHER HEALTH ISSUES

Concern for mental health coincides with elevated concern for other health issues

Consumer segmentation: Needs of consumers facing high/extreme stress, 15-29

Consumer segmentation: Needs of consumers facing high/extreme stress, 30-44

Consumer segmentation: Needs of consumers facing high/extreme stress, 45-59

Consumer segmentation: Needs of consumers facing high/extreme stress, 60+

The pernicious cycle of stress and sleeping problems

High/extreme stress corresponds with poor sleep around a range of habits

The emerging revolution of stress + sleep products

Stress and sleep and the integration with immune support

Weight management and the interplay with stress

Ineffectiveness of weight management solutions dissuade high-stress consumers

Digestive health an emerging area to combine with stress relief

Improving science in gut-brain axis opens new era for probiotics growth

Mental health and cognition combinations to address the factors inhibiting focus

The next wave of mental health supplement blends

## ANALYSING THE ONLINE MARKETPLACE FOR MENTAL HEALTH PRODUCTS

Adaptogenic products overwhelmingly tilt to consumer health

Powders and capsules are the most popular formats for adaptogenic supplements

Ashwagandha the clear adaptogen leader, but the market has a dynamic range of ingredients

Benefit blends dominate the marketplace for mental health supplements

## IMPLICATIONS FOR FUTURE GROWTH

What to focus on to prepare for the next evolution of mental health products

Key takeaways

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