

Getting Ahead of the Curve: Cognitive Fitness

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A new holistic approach to health; unprecedented levels of stress, anxiety, and job burnout; an aging population; and media attention to opioid addiction, PTSD, low test scores, celebrity suicide, and homelessness have catapulted mental health issues to mega global market status.

Over the past five years, consumers have redefined healthy living to include a strong mental/emotional health component, according to the Hartman Group's 2019 Health + Wellness report (see Figure 1). Ipsos's October 2019 Attitudes Toward Mental Health reported that 80% of U.S. adults believe that being cognitively fit is as important as being physically fit.

Nearly two-thirds of U.S. adults experienced a cognitive health issue last year; women, lower income, and less educated consumers were more likely to report an issue, per Multi-sponsor Surveys' 2018 Segmentation of the Market for Cognitive Health Supplements.

Younger adults aged 18-34 (73%) were the most likely to report cognitive issues; followed by those 35-49 (64%), 50-64 (59%), and those 65 and older (52%), per Multi-sponsor. One-third of gen Z teens and 37% of millennials have visited a mental health professional; 40% have researched a mental health issue online, per Ypulse's 2018 Health & Fitness Study.

FIGURE 1: What Does Health & Wellness Mean to You?



Source: Hartman Group, 2019

Over half (55%) of consumers feel stressed throughout the day, 45% worried, and 22% angry—the highest level in the past 10 years, according to Gallup's 2019 Global Emotions Report.

Six in 10 said overwork is among their top mental health issues; insomnia 57%, according to GlobalData's 2018 Top Trends in Healthcare & OTC.

Globally, mental well-being is the #1 attribute defining consumers' perception of being healthy, followed by "feeling good," according to Euromonitor's 2019 Top Consumer Trends Impacting Health & Nutrition. Half of global consumers are looking for new solutions to prevent stress/anxiety issues, 48% sleeping problems, and 42% memory issues.

Most important, in July 2019 the World Health Organization added "burnout" to its International Classification of Diseases.

Conditional Priorities

Retaining mental sharpness with age tops the list of health concerns that global and U.S. consumers are extremely/very concerned about, per HealthFocus 2019 U.S. and Global, Consumer Trends Reports. In the U.S., memory ranks third, tiredness/lack of energy fifth, and stress ninth; tiredness fourth and stress fifth globally (Figure 2).

FIGURE 2: Top U.S. Health Concerns by Age (% Extremely/Very Concerned)

Total	18-29	30-39	40-49	50-64	65+
Retaining mental sharpness as I age, 60%	Stress, 65%	Maintaining ability to continue with my normal activities as I age, 60%	Retaining mental sharpness as I age, 57%	Retaining mental sharpness as I age, 63%	Retaining mental sharpness as I age, 66%
Maintaining ability to continue with my normal activities as I age, 59%	Tiredness/lack of energy, 57%	Stress, 59%	Maintaining ability to continue with my normal activities as I age, 56%	Maintaining ability to continue with my normal activities as I age, 61%	Maintaining ability to continue with my normal activities as I age, 65%
Memory, 55%	Dental health, 56%	Dental health, 58%	Memory, 54%	Vision, 60%	Memory, 59%
Vision, 55%	Sleep problems, 52%	Retaining mental sharpness as I age, 58%	Stress, 52%	Memory, 56%	Vision, 56%
Tiredness/lack of energy, 52%	Retaining mental sharpness as I age, 50%	Tiredness/lack of energy, 57%	Tiredness/lack of energy, 51%	Bone health/strength, 56%	Bone health/strength, 55%

Source: HealthFocus, 2019

Memory concerns ranked third or fourth for those over age 50; seventh for their younger counterparts. Stress is not among the top 10 concerns for those aged 50 and older, per HealthFocus.

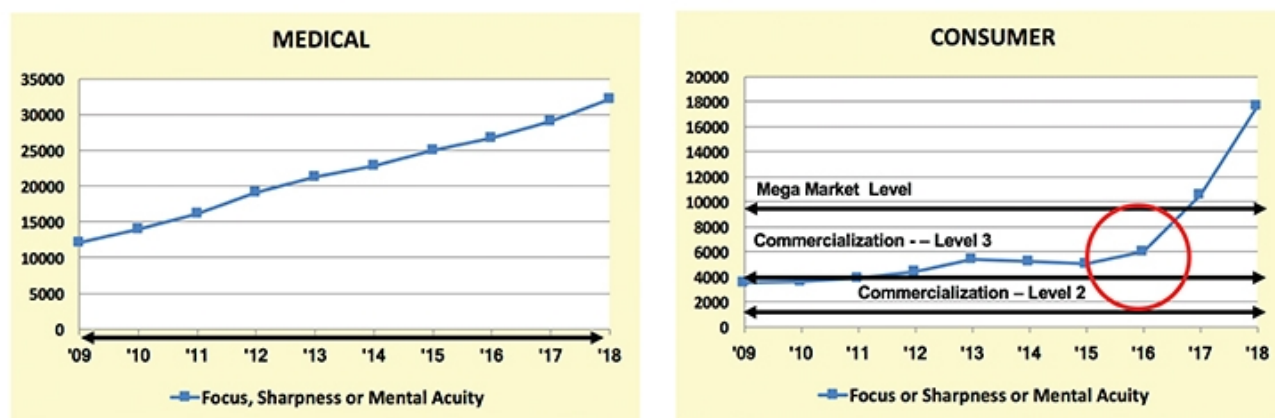
Stress/anxiety has replaced being overweight as the top health condition for U.S. households; 61% are trying to treat/prevent, per Hartman. Exercise is the most frequent course of action used by 49% of households, followed by OTC/Rx medications (32%), food/beverage (20%), supplements (16%), and alternative care (13%) (See Sloan/Hutt, Nutraceuticals World, September 2019).

Half (52%) of households are trying to prevent/treat fatigue; 46% depression, and 40% memory/cognitive decline. After exercise, 30% of households look to supplements, 24% food/beverages, and 18% Rx/OTC as a remedy for memory/cognitive decline.

In contrast, OTC/Rx solutions are the most frequently used as a remedy for depression, followed by exercise 39%, food/beverage 21%, supplements 14%, and alternative care 13%, per Hartman.

According to Sloan Trends' TrendSense predictive model, the marketability of nearly all popular major mental health linkages has shown explosive growth since 2016, including cognition, mental acuity, anxiety, and mood. New medical research studies/findings have also accelerated at a torrid pace. Mental acuity/sharpness and stress are both very large "Mega Level" nutraceutical opportunities; cognition, memory, insomnia, and sleeplessness are Level 3 markets (Figure 3).

FIGURE 3: TrendSense Predictive Model: Focus, Sharpness or Mental Acuity — Mega Level



Note: All terms run in the context of Health/Nutrition/Brain Health

Source: Sloan Trends' TrendSense

Cognitive Connections

Those dubbed "fit" consumers, who live a healthy active lifestyle differentiated by integrating frequent physical exercise (3-5 days per week) and focus on enhancing their everyday mental/physical performance, are a prime target for preventing/maintaining cognitive health. Most important, they may well represent as much as 40% of the U.S. adult population ([see Sloan/Hutt Nutraceuticals World, March, 2019](#)).

Nearly three-quarters of "fit" consumers always/usually choose foods/drinks to improve their energy level, 59% mental performance, and 64% their mood, per HealthFocus.

One-quarter of consumers look for food/drinks that provide mental energy; one in five morning energy. Four in 10 adults link protein to mental energy and 40% to brain nourishment, per HealthFocus ([see Sloan/Hutt, Nutraceuticals World, October 2019](#)).

Nutrition Business Journal (NBJ) projected sales of energy supplements will reach \$2.5 billion by 2021. Seventy-percent of consumers under age 44 want more energizing snacks; 64% snacks with an energy boost, per IRI's 2019 State-of-the-Snack-Food Industry.

Nearly six in 10 (57%) believe that digestive health/microbiome plays an extremely/very important role in maintaining daily energy levels, 56% overall mental well-being, 51% mood, and 51% stress levels, per HealthFocus.

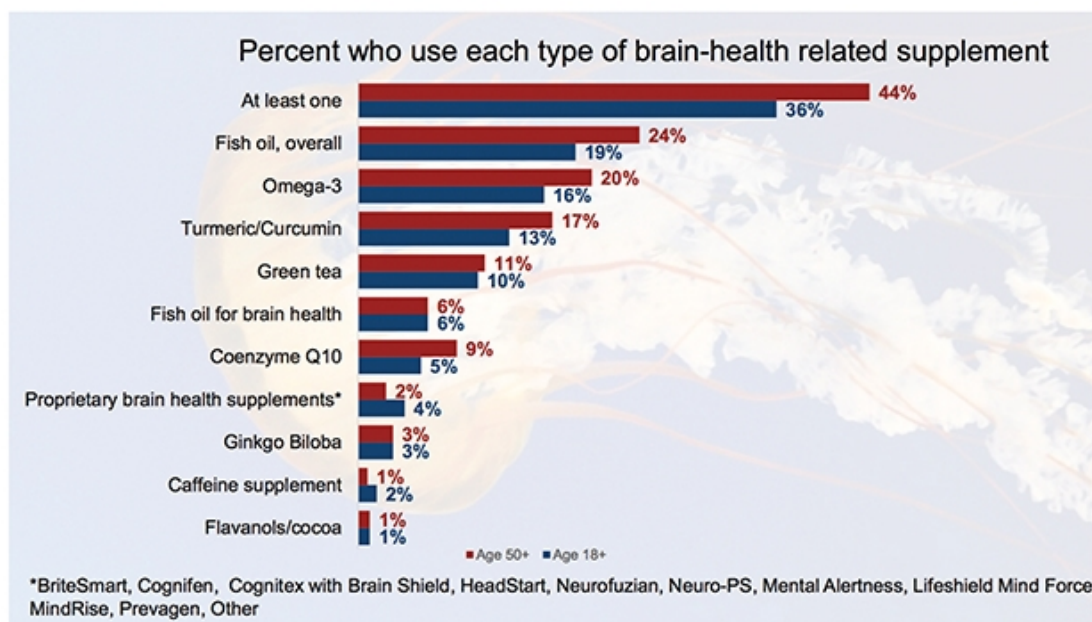
Among the top six ingredients by sales in the mood, stress, and mental health supplement category, NBJ projected hemp/CBD will have the highest growth rate at over 20% per year through 2022; with combination herbs in the general brain health category over 10% per year. Anxiety, pain, relaxation, sleeplessness, and depression are the top reasons for CBD/hemp nutraceutical use, per Mintel's 2019 A Conversation on Cannabis.

Brain Supplements

According to the June 2019 ARP's AARP/Ipsos, Brain Health and Dietary Supplement Survey, 23% of adults (26% age 50-73, and 36% age 74 and over) regularly take at least one supplement for brain health.

Overall, about 90 million people take at least one of the brain-health related supplements in Figure 4. Although comparatively fewer adults take proprietary/specialty brain health supplements (e.g., Prevagen), more than 10 million users do so.

FIGURE 4: Supplements Taken for Brain Health



Source: Ipsos/AARP, June 2019

CRN's 2019 Consumer Survey on Dietary Supplements reported that of those who take a brain supplement, 71% do so for memory, 70% mental focus, 46% cognition, and 34% for mood.

Although African American and Hispanic adults are most likely to believe that dietary supplements are extremely/very effective in maintaining or improving brain health/mental sharpness, they are less likely to take a brain health supplement, per AARP.

NBJ projected sales of brain cognitive supplements will reach \$1.1 billion by 2022; mood, stress, and mental health supplements \$1.0 billion.

Functional Treats & Eats

One in five always/usually choose foods/beverages to improve their mental performance; 45% to maintain mental sharpness with aging, per HealthFocus.

Brain health ranks sixth among the benefits consumers would most like to get from foods; better emotional/mental health tenth, per IFIC's 2019 Food & Health Survey. Among those aged 50 and older, memory, focus, and cognition ranked fourth, mental/emotional health

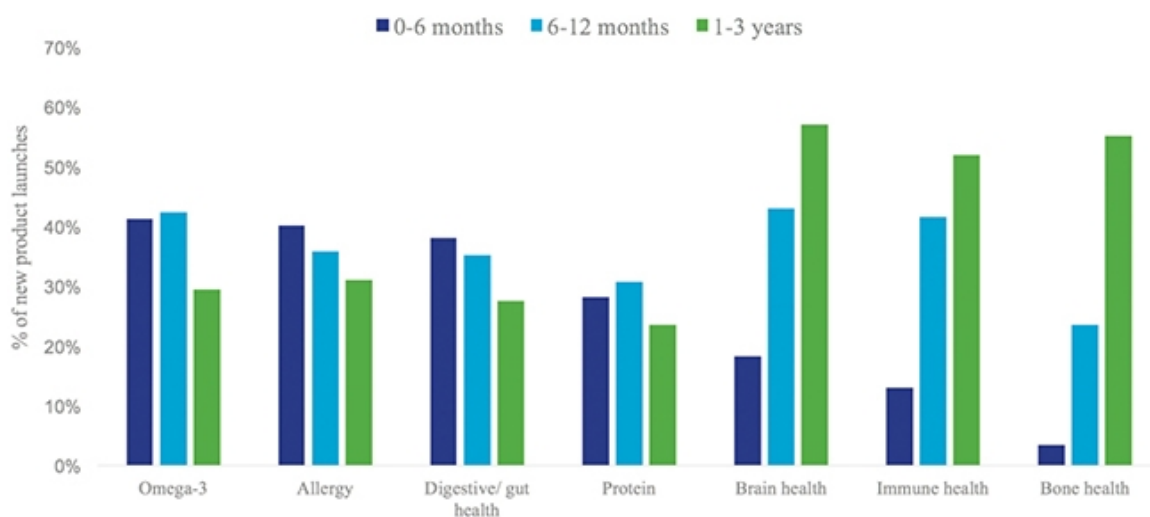
seventh.

On average, 46% of consumers want more functional foods/drinks for mental clarity/health, per Datassential's 2018 Functional Food Report. Fifty-seven percent want more foods/drinks for energy, 47% stress, 46% sleep, 41% cognitive function, and 37% for mood.

Ready-to-drink functional sports beverages are projected to reach sales of \$1.4 billion in 2021, up 15% per year, per NBJ. In January 2019, Beverage Industry magazine concluded that "soft drinks with mental health benefits are a missed opportunity in North America."

One-quarter of consumers want more functional products for children's brain development, (e.g., DHA and choline), reported Datassential. Brain function was the top claim on new infant formula products introduced worldwide in 2018, per Innova Market Insights (Figure 5). Infant formula is the largest and fastest growing packaged food category in the world.

FIGURE 5: Health Claims for Baby Milk/Formula (Europe)



Source: Innova Market Insights 2019

With 50% of consumers experimenting with a new diet/eating plan in the past year, per Hartman, eating plans that enhance brain health will find a welcome market. The Mediterranean Diet has long been recognized for its positive impact on cognitive function,

Parkinson's, and Alzheimer's disease; social interaction and dining with friends is part of the lifestyle.

Lastly, BCC Research LLC's 2018 Nutraceuticals: Global Markets to 2023 projected that memory and mental health nutraceuticals will reach \$6.7 billion globally by 2023. North America is expected to enjoy the fastest growth with a CAGR of 9.5% through 2023, followed by Asia-Pacific 8.4%, and Europe 6.7% (Figure 6).

FIGURE 6: Global Nutraceutical Memory & Mental Health Market (\$ Billions)

Region	2017	2018	2023	CAGR% 2018-2023
North America	29.0	31.3	46.3	8.1
Europe	18.8	20.3	29.6	7.8
Asia-Pacific	18.0	19.4	29.2	8.5
South America	3.8	4.1	5.8	7.2
Total	69.6	75.1	110.9	8.1

Source: BCC Research LLC's 2018 Nutraceuticals: Global Markets to 2023

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