Getting Ahead of the Curve: Conditional Redirections

Traditional notions of which health ailments concern specific generations have shifted, leading to new opportunities for product developers.

By Dr. A. Elizabeth Sloan & Dr. Catherine Adams Hutt

There has been a dramatic turnaround in the health conditions consumers are concerned about and hope to manage or treat by age. As aging baby boomers fight to maintain an active lifestyle, everyday issues that were once the purview of younger generations (e.g., energy, sports nutrition, weight, muscle/strength, and sleeplessness) are moving onto their front burner.

Conversely, despite medical evidence confirming that the true incidence of some of these conditions increases with age, millennials are now the most likely to complain about digestive issues, regularity, joint/back pain, skin issues, bone strength, and mental sharpness.

Successfully addressing these conditions in the context of a new generation's health attitudes, favored product forms, and ingredient preferences will offer significant incremental sales opportunities for well-established dietary supplement, functional food/beverage, and OTC/homeopathic categories.

And a big business it will be. According to the Hartman Group's Health & Wellness Report, on average, U.S. households are actively managing 9.6 health conditions, treating 3.4, and trying to prevent 6.2. Households headed by someone 70 years and older are working to manage 10.3 health conditions, treating 4.3, and trying to prevent 6.0.

Moreover, IRI's September 2017 Realigning for Growth report confirmed that Americans shifted their food buying decisions from one based primarily on form (e.g., water or coffee) and brand to one driven by the product's benefits (e.g., protein). This change allows marketers to increase potential revenue by competing across multiple product categories for the same benefit.

After vitamins/minerals, specialty supplements were the most used dietary supplements last year, taken by 38% of adults; followed by herbals/botanicals (29%), sports nutrition (22%), and weight management (15%), per CRN's 2017 Annual Survey on Dietary Supplements.

Actively Speaking

Those 65 and older are now the most likely to describe themselves as active, at 55%, vs. 38% of those aged 18-34, according to Mintel's Managing Your Health – US (January 2017). Forty-five percent of the U.S. adult population is now age 50 and older.

In 2017, 41 million adults over age 50 were regular exercise walkers, up 14% over the past five years; 12 million aerobic exercisers, up 46%; 9 million exercised at a gym, up 14%; and 4 million were runners, up 87%, per the National Sporting Goods Association's 2017 Sports Participation Study. Those 65 years and older were the fastest-growing exercise segment.

The sports/energy beverage category—whose sales are projected by *Nutrition Business Journal* (*NBJ*) to reach $23 billion in 2018, up 5%—has plenty of room to grow among older consumers. Forty


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Figure 1. Energy and Sports Drink/Shot Usage by Age Group, 2016 (% of U.S. adults)

Product Category	18-24	25-34	35-44	45-54	55-64	≥65
Energy Drink/Shot Usage	26.1%	26.9%	20.9%	12.1%	6.6%	3.8%
Sports Drink Usage	53.2%	49.0%	43.7%	39.9%	29.9%	15.4%

Source: Compiled by Packaged Facts based on Simmons Market Research NCS Adult Study 12-Month, Fall 2016.

Figure 2. Usage Rates of Nutritional Shakes and Bars by Age Cohort

"Do You Buy Nutritional Shakes or Bars?," 2017 (percent of group)

Response	18-34	35-44	45-54	55-64	65+
Yes, I Buy Shakes/Beverage Mixes	29%	28%	26%	16%	12%
Yes, I Buy Bars	46%	45%	42%	32%	29%
No, I Do Not Buy Them	41%	43%	47%	61%	64%

Source: Packaged Facts National Online Consumer Survey, September 2017

percent of those age 45-54; 30% age 55-64; and 15% age 65 and older currently use sports drinks. Although reformulation will be necessary to attract those 50 years and older, 12%, 7%, and 4% respectively, use energy drink/shots, per Packaged Facts' 2017 Energy and Sports Drinks U.S. (Figure 1). A 2016 HealthFocus survey reported that 43% of those age 50-64 and 35% age 65 and older are personally affected by tiredness/lack of energy.

One-third of adults over age 45 tried to lose weight last year vs. 20% of those age 35 and under; efforts to maintain weight increased with age, led by those age 65 and older, according to Packaged Facts' 2018 Organic and Clean Label Food Consumer in the U.S.

Half of Americans are watching their diet; 65% age 65 and older vs. 38% age 18-34. Those 65 and older also over-index for checking for lactose, as lactose intolerance increases with age.

Half of those age 50 and older are very/extremely concerned about muscle health/muscle tone, per HealthFocus. Only 17% over age 65 meet the NIH's muscle strength guidelines; only 13% age 75 and older.

According to Abbott's and AARP's 2016 survey on Managing Muscle Loss, 74% of adults age 50 and older are aware of losing muscle with age. One in four said their doctor had talked to them about muscle loss. Seven in 10 would increase their protein intake to minimize the risk of losing muscle and to improve lean body mass/tone. In the U.S., 45% of those age 65 and older already have sarcopenia, which is defined by low muscle mass and low muscle quality/function.

Boomers, by far, are the most likely to suffer from insomnia, snoring, sleep apnea, and other sleep disorders; followed by those age 70 and older. Women over age 50, and especially those who are overweight, have the highest incidence of sleep disorders, per Packaged Facts' February 2017 Sleep Management in the U.S.

Lastly, nearly one-third of those age 55-64 use nutrition bars; 29% of those 65 and older. Although just over one in 10 adults buy shakes/beverage mixes, these products have potential as condition-specific nutraceutical product carriers, per Packaged Facts' November 2017 Nutritional Shakes and Bars U.S. (Figure 2).

Growing Pains

Although 82% of adults report suffering from digestive issues, and 37% are trying to manage them, younger adults are the most likely to say they're afflicted, per Mintel's Digestive Health - U.S. (July 2017).

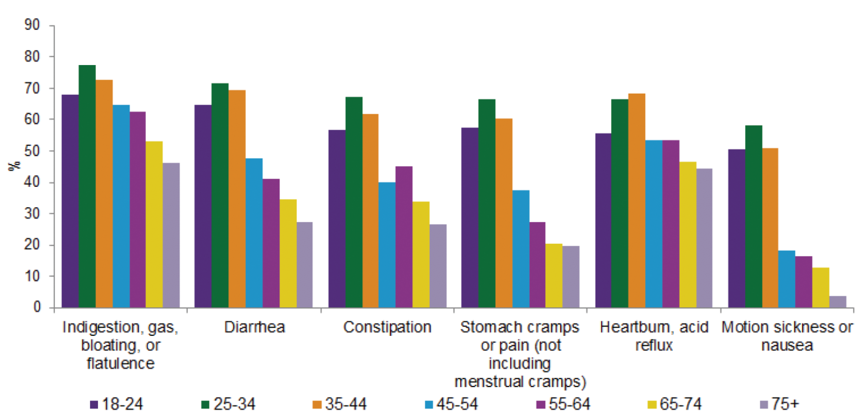
Those age 25-34 are the most likely to report they suffer from indigestion, gas, bloating, or flatulence, 77%; diarrhea 72%; constipation, 69%; stomach cramps, 68% (not menstrual); and 64% motion sickness/nausea, per Mintel. Those age 35-44 are the most likely to suffer from heartburn/acid reflux. Younger adults are significantly more likely to report nervous stomach and irritable bowel syndrome than any population group (Figure 3).

In descending order, fiber, probiotics, and digestive enzymes were the top three specialty supplements used by millennials in 2017, per CRN. Digestive health is the fastest-growing condition-specific supplement category, projected by *NBJ* to reach \$3.1 billion in 2018, +10% vs. 2017. Probiotic supplements are projected to reach \$2.4 billion in 2018, up 12%; digestive enzymes \$364 million, up 6%. Regularity is clearly an untapped market for young adults.

With many in more labor intensive and computer office jobs, it's not surprising that 38% of those age 18-29, 42% age 30-39, and 43% age 40-49 are afflicted with back or neck pain, per HealthFo-

Figure 3. Digestive Issues Reported by Age Category

"In the past 12 months, for each of the following gastrointestinal/digestive problems you may have experienced, which type of treatment did you use?" "Experienced ailment (net)"



Base: 2,002 Internet users aged 18+

Source: Mintel's Digestive Health US, July 2016 report.

cus; 30%, 43%, and 43% respectively, are very/extremely concerned about arthritis. Two-thirds of those afflicted with arthritis are under age 65, per the Arthritis Foundation. Joint health supplements are projected by *NBJ* to reach $1.8 billion, up 2% in 2018.

Lower back/neck pain and muscle soreness are the most cited types of pain among young adults after headaches, per Packaged Facts, January 2017 Pain Management in the U.S. Four in 10 age 18-29 and half of those age 30-49 are very/extremely concerned about bone strength.

While often thought of as concerns later in life, mental sharpness/focus and depression are issues among young adults; 22% of those under age 50 say they are personally affected by depression; 16% lack of mental sharpness or focus, per HealthFocus. Eight in 10 millennials and 67% of gen Xers believe that food impacts their energy and mental clarity, according to *NBJ's* 2017 generational consumer survey.

Half of those age 18-34 and 45% of those age 35-49 are very/extremely concerned about skin health; one in 10 age 18-39 and 24% age 40-49 worry about wrinkles and other signs of aging, per HealthFocus. Keratin and collagen supplements were the fourth most used specialty supplement by millennials last year, per CRN, each used by one out of 10.

Functional Foods

With 51% of all adults watching their diets—25% to manage a health condition—per Packaged Facts 2018 report, functional food/beverages remain in high demand. Although heart health still leads the list of conditional benefits consumers want from foods (76%), it is quickly followed by energy (73%), digestive health (70%), maintaining/improving mind health (70%), immunity (68%), and helping build physical strength (65%), according to FMI's 2016 Shopping for Health report.

Dietary Supplements

While one in five adults admit they don't think they get enough of their basic vitamins/minerals, even more consumers—30% of millennials and 24% of adults overall—feel they don't get enough special nutrients, per FMI's 2017 U.S. Grocery Shoppers report.

Brain health/cognition/alertness topped the list of the biggest new opportunities for targeted nutrition products in a 2017 survey of nutraceuticals manufacturers; followed by gut health, anti-aging, weight management, diabetes, immunity, joint health, mood, and heart health, per *NBJ's* 2017 supplement manufacturer/marketer survey. *NW*