



Need States: Understanding the Future of Functional Beverages

May 2023

INTRODUCTION

Scope

Key takeaways

Exploring the concept of need states

The emergence of need states in the beverage industry

Where does the need states framework come from?

Need states can be broken down into three major groupings

What is relaxation anyway? The challenge of definitions and need states

The key drivers of need states

THE CULTURE OF SELF-OPTIMISATION

Consumers turn to the only ones they fully trust in an uncertain world: Themselves

Hydration has become about far more than drinking enough water

Drink Alchemy aims to help consumers maximise their potential

Implications: The culture of self-optimisation

MENTAL STABILITY IN THE AGE OF ANXIETY

The consumer of the 2020s operates from a high baseline level of stress

The caffeine paradox: At the intersection of energy and calming

Moment and “drinking your meditation”

Implications: Mental stability in the age of anxiety

DIGITAL CULTURE AND E-COMMERCE

Need state-based product development requires the internet

Nootropics try to expand their circle from their core enthusiasts

Case study: Olipop leverages internet savvy into promoting its functional benefits

Implications: Digital culture and e-commerce

PILL FATIGUE AND FOOD AS MEDICINE

Pill fatigue has moved consumers to seek natural solutions to their health concerns

A new class of weight loss drugs and a possible reversal to pill fatigue

Perfectly Me and a more targeted approach to women's health

Implications: Pill fatigue and food as medicine

CONCLUSION

Key takeaways

Need states: How to win

Evolution of need states

Questions we are asking

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