



2023 TRENDS TO WATCH

THE WELLNESS REVOLUTION

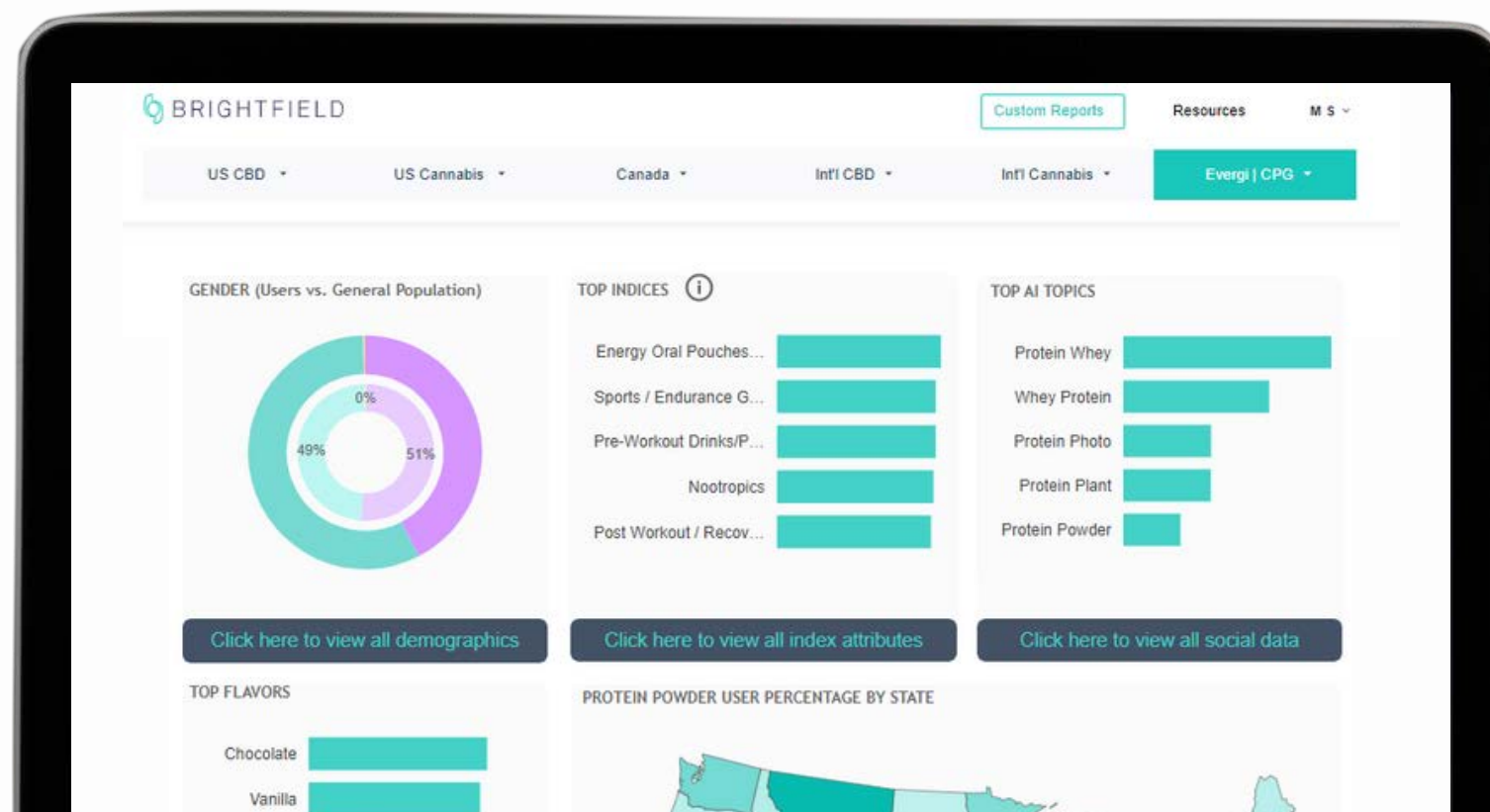
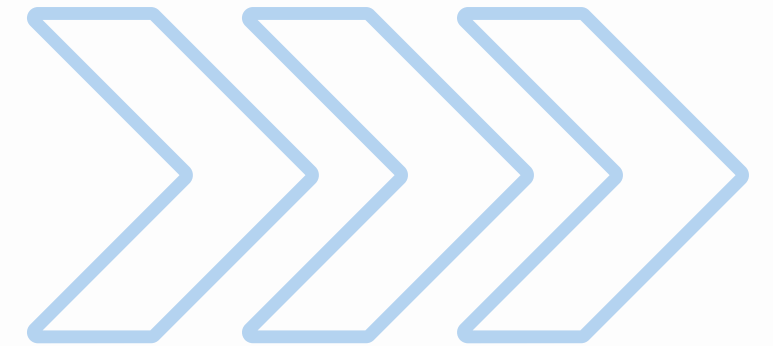
How Americans Are Changing the Way They
Spend On Health



Consumer Insights that Connect

Get unmatched visibility into who your consumers are to drive sales, loyalty and brand awareness.

Brightfield is the best source for actionable consumer insights. We help companies develop successful products that meet customers' ever-evolving needs. Innovators use our data to stay on top of emerging categories using social listening and survey data in a user-friendly platform.



About Us

Brightfield Group is the leading social listening-enabled research firm serving the global cannabis, CBD, and emerging wellness industries.



This is our **FREE** report

This report includes a small fraction of the data and insights in Brightfield's **Consumer Insights for Wellness and CPG brands**.

Brightfield Group consumer insights are integrated with social listening to dive deep into:

- Plant-based dairy and milk
 - Protein powder and supplements
 - Energy-boosting products
 - Cannabis and hemp-derived THC's
 - Ready-to-drink coffee
- & so many more categories!**

Get in Touch!



Decision-Making Challenges

Understanding what consumers are facing in our current economic climate

Consumers often pull back spending in uncertain times, looking for ways to spend smarter. We see a gradual increase in search “spending less” over the past year.

Brightfield consumer insights found that 56% of Americans said they are buying less expensive items and 40% said they are buying fewer health and wellness items.

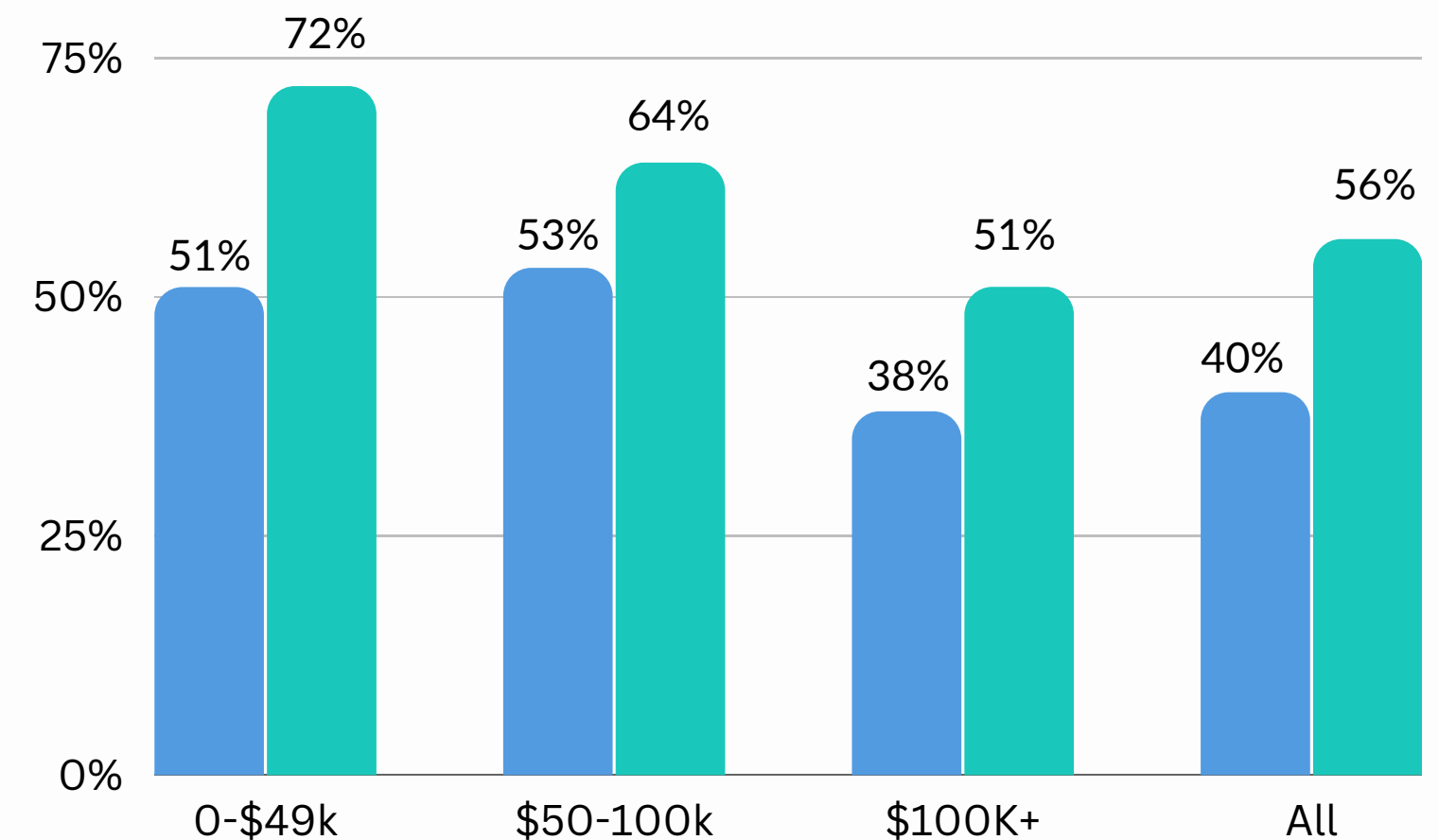
Of course, consumers income levels will impact how they spend during tough times. We see that the lowest income group is shifting very strongly toward less expensive products.

**SEE THE DATA BY DETAILED DEMOGRAPHICS IN
BRIGHTFIELD'S U.S. CONSUMER INSIGHTS DATA**



Purchase Habit Changes by Income

% of Americans agreeing with statement



- I am buying less expensive products compared to last year
- I am buying fewer Health & Wellness items than I was last year

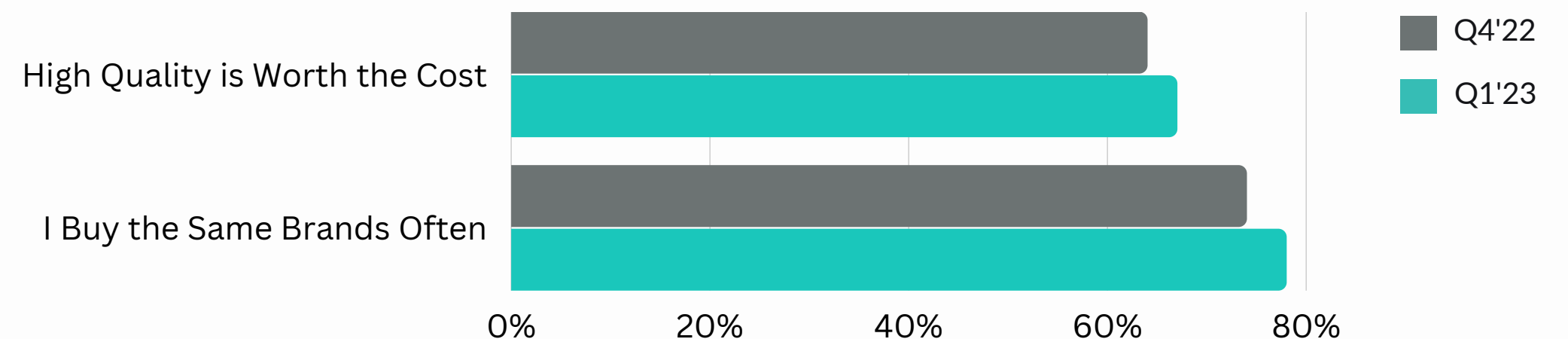
Source: Brightfield Group; U.S. Wellness Social Listening; May 2023

Less Risks with Quality Products

While consumers are looking to spend wisely, they are often less likely to take on risks. As economic uncertainty in the U.S. continues, we see this in our data and in other sources. Our data shows a recent increase in Americans saying high quality is worth the cost - **from 64% in Q4'22 to 67% in Q1'23**.

Consumers are apt to pay a little more for a "sure thing" rather than impulse buying something that may let them down. We also see an increase in Americans saying they are buying the same brands often - **from 74% in Q4'22 to 78% in Q1'23**.

% of Americans in Agreement with Statement



Source: Brightfield Group; U.S. Wellness Consumer Insights; Q1 2023

Four Major Trends

**Sleep is the
new Sex**



**Is the Gut our
Motherboard?**



**Proactive
Mental Health**



**Focus in an over-
stimulating world**



Sleep is the New Sex

Social listening-enabled consumer insights provide a detailed view into how consumers talk about sleep online

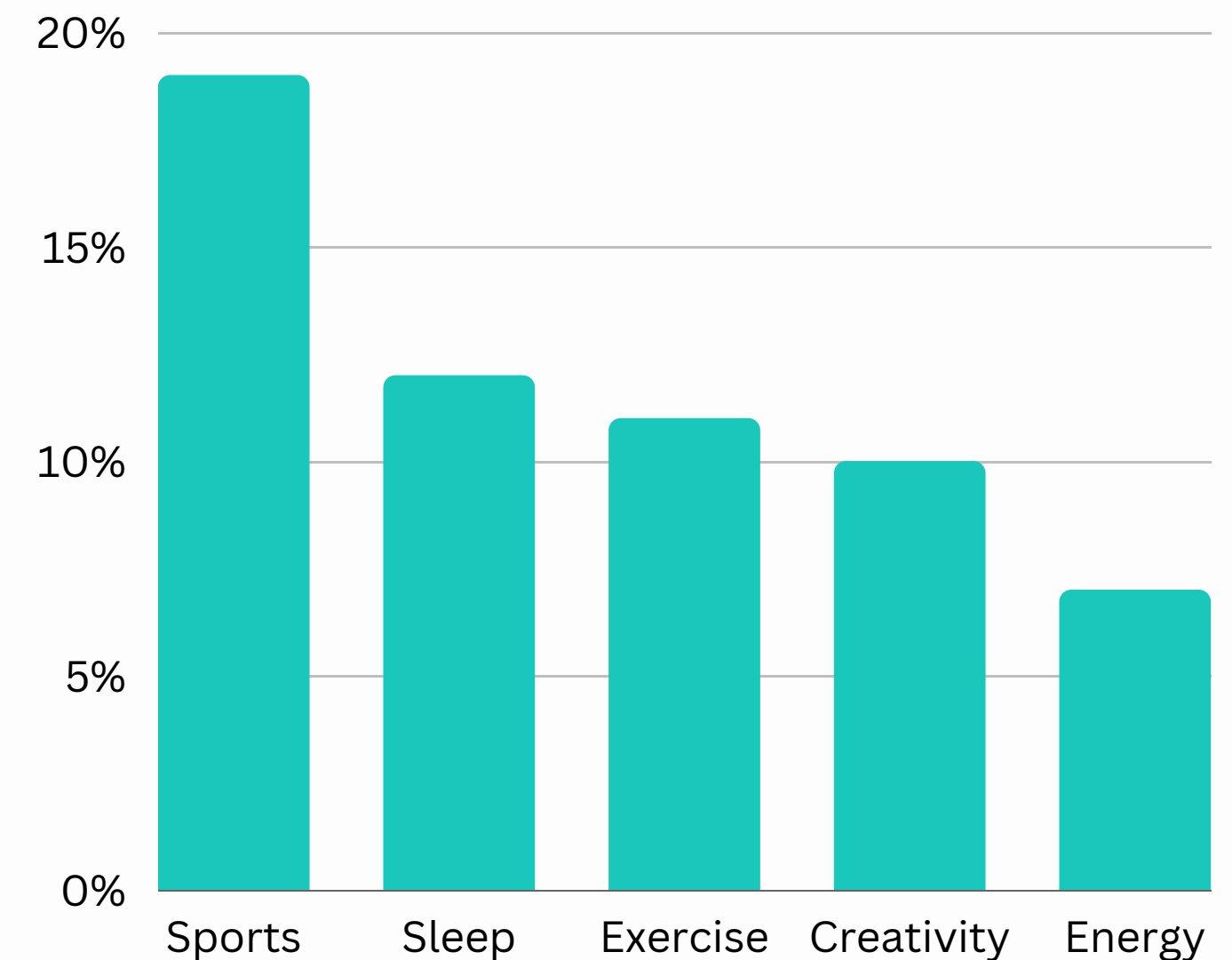
More science is pointing out that getting enough sleep is the **single most important** thing you can do to improve your well-being and ensure you stay physically and mentally healthy.

According to Brightfield social listening data, sleep is the **#2 wellness topic** discussed on social media behind sports. Brightfield consumer insights data shows sleep is a growing priority for nearly **3 out of 4 Americans**.

Apparently, sleep is the new sex—everyone's talking about who's getting it, who's not, how you get more, and how you make it better. Interestingly, those who say sleep is a priority are also more likely to say they focus on whole-body well-being.

Wellness Topics on Social

% of Twitter & Instagram wellness conversations on topic



Source: Brightfield Group; U.S. Wellness Social Listening; May 2023

Products Consumers Seek for Sleep

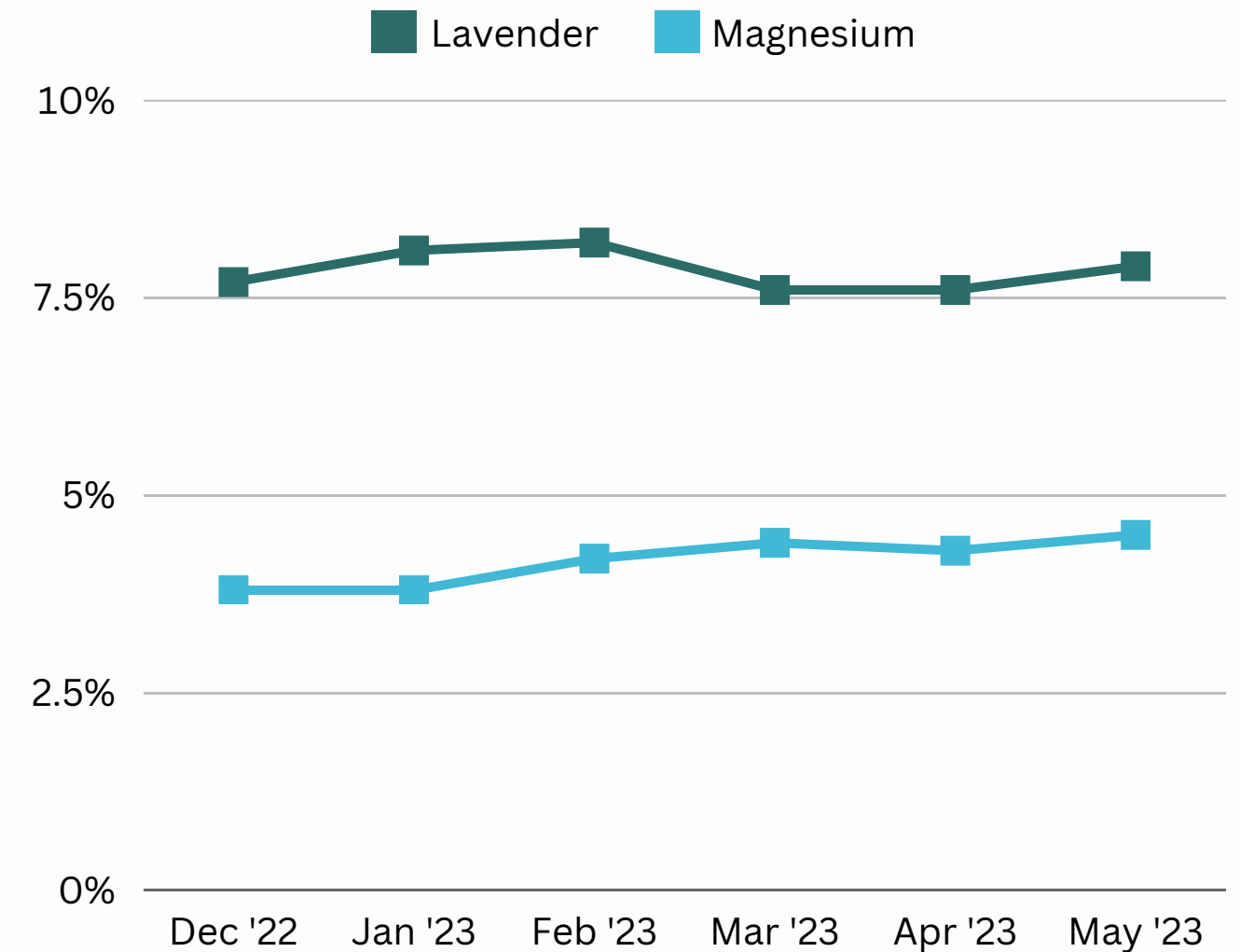
Brightfield consumer insights show an increase in Americans seeking out products they are labeled as “helps with sleep.”
Nearly a third are looking for this!

Basic sleep supplements like **magnesium** and **melatonin** are used by many Americans and are talked about frequently on social media. About 1 in 10 consumers said they purchased melatonin or magnesium in the past 3 months.

Looking to social listening, magnesium is also seeing increased conversations mentioning the ingredient online. **Lavender** - another ingredient often linked with sleep products - has also experienced steady chatter online in the past 6 months.

Magnesium & Lavendar

% of Twitter & Instagram wellness conversations mentioning ingredient



Source: Brightfield Group; U.S. Wellness Social Listening; May 2023

**HUNDREDS OTHER INGREDIENTS, PRODUCTS, & FLAVORS
TRACKED IN BRIGHTFIELD'S SOCIAL LISTENING PORTAL**



Is the Gut our Motherboard?

The term 'gut microbiome' hits mainstream culture

Hippocrates apparently claimed that 'all disease begins in the gut' more than 2000 years ago. However, the idea didn't catch on widely until the formation of The Human Microbiome Project, ran by the NIH from 2007 to 2016. This organization funded numerous studies that gave us the first glimpse of the possible relationships between human diseases and the gut. In 2016, President Obama's administration created the National Microbiome Initiative to help understand the microbiome and how it could be used in the areas of health care, food production, and environmental restoration.

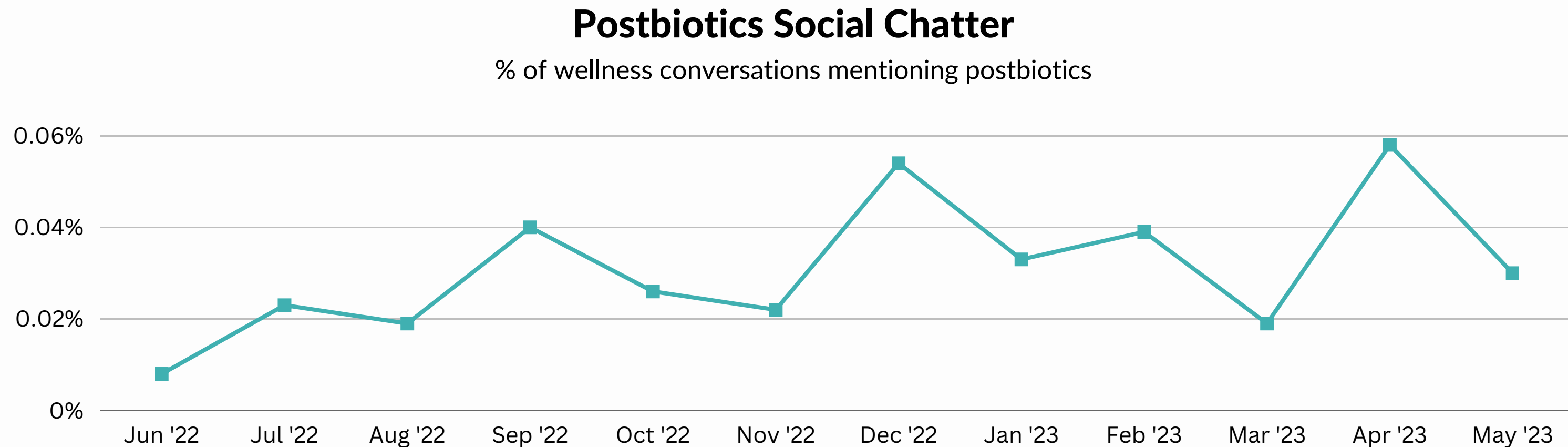
Now the term "**gut microbiome**" is part of most Americans vocabulary, and everyone is looking into how they can improve their gut health.



Products Consumers Seek for Gut Health

Brightfield consumer insights show that nearly half of consumers believe that gut health affects wellbeing, and this idea has been growing. More Americans are seeking out the label claim “**supports digestive/gut health.**” This is true even more so for millennials and Gen Xers. Women are also more likely to be looking for this claim.

We see lots of chatter about **prebiotic products** in our social listening data, especially prebiotic soda/drinks. Now we see **postbiotics** on the rise – another metabolite essential to a healthy gut.



Proactive Mental Health

Consumer insights shows anxiety is the top condition plaguing Americans

Mental health has become as much of a priority as physical health for many Americans. The pandemic pushed the focus on mental health even further forward and normalized the need to pay special attention to our mental health. We see more and more companies and schools recognizing the need and approval of taking mental health days. We now live in a culture where it's hard for people to relax even for a few hours, let alone a whole day.

Almost a quarter of Americans say they suffer from anxiety, making it the top condition plaguing Americans. Many reputable mental health surveys show this number much lower, but we think this number accurately portrays people who may be self-diagnosing and self-treating. When looking at Gen Zers, **anxiety jumps up to 35%**. Anxiety continues to be a topic that is heavily talked about on social media.

DEPRESSION, PTSD, INSOMNIA AND DOZENS MORE CONDITIONS
TRACKED IN BRIGHTFIELD CONSUMER INSIGHTS



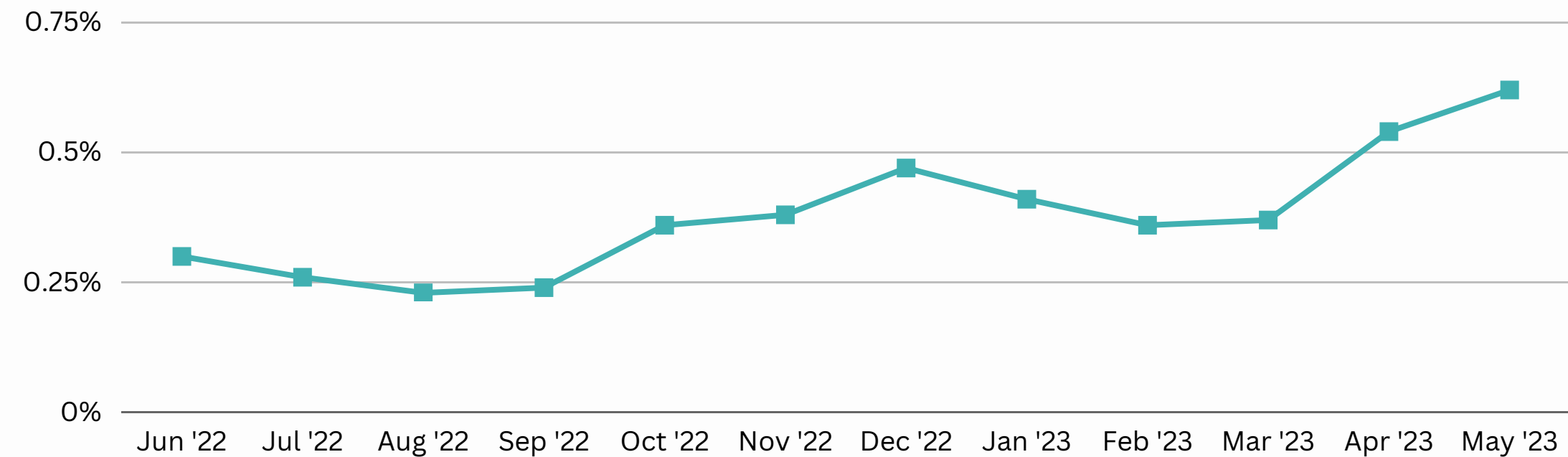
Products Consumers Seek for Mental Health

Cordyceps is said to help regulate the nervous system, which can become overstimulated when you experience chronic stress. Reishi mushrooms are thought to calm the mind by acting as a sedative for the nervous system.

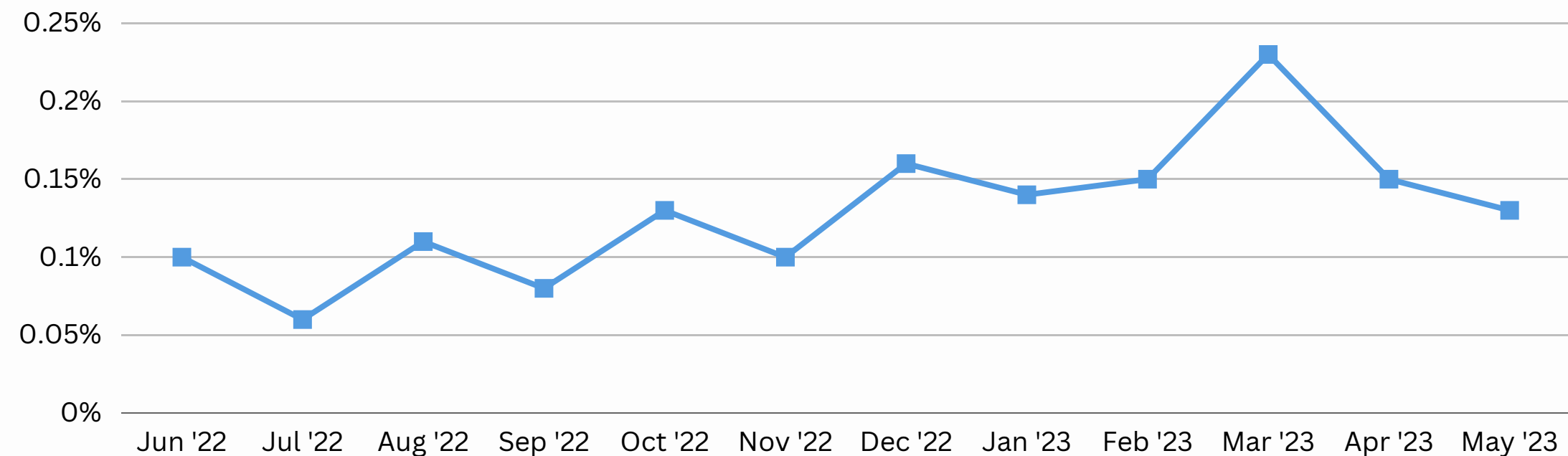
Only about **2%** of Americans said they have purchased Reishi mushrooms in the past 3 months, and only **1%** for Cordyceps but conversations on social are on the rise.

It's also worth noting that the incidence of use is likely suppressed a bit because consumers may be taking supplements that contain a “proprietary blend” for anxiety/stress that has Reishi or cordyceps and don't realize what's in it.

Cordyceps Social Chatter
% of wellness conversations mentioning cordyceps



Reishi Social Chatter
% of wellness conversations mentioning reishi



Focus in a Distracting World

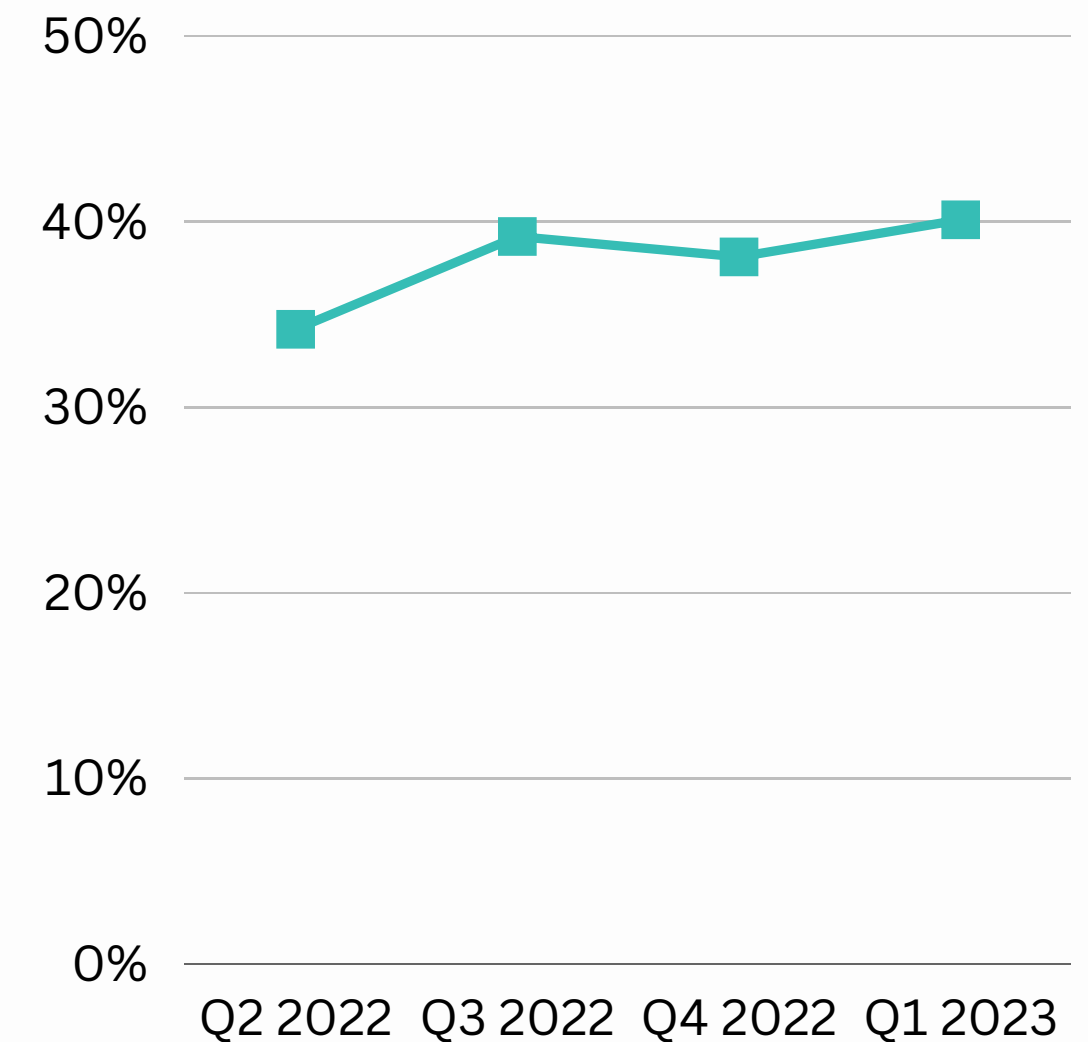
Americans are feeling focus starved and are seeking out ways to stay on track. 4 in 10 Americans say staying focused is difficult. This is even more true of millennials, where **55%** say staying focused is difficult.

Consumers who agree staying focused is difficult are also more likely to agree **they are often anxious and stressed out** (83%), that they practice mindfulness (71%), **they are focused on their mental health** (78%).



Agree: Staying Focused is Difficult

% of Americans agreeing with statement



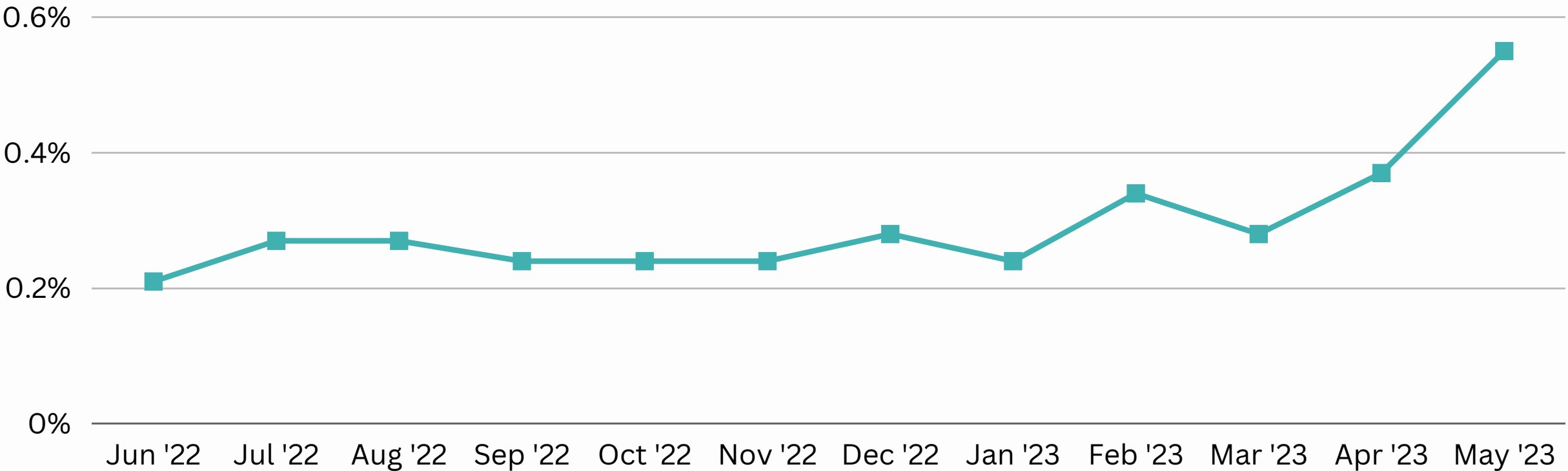
Source: Brightfield Group; U.S. Wellness Consumer Insights; Q1 2023

Products Consumers Seek for Focus

Discussions about Lion’s Mane are the rise. Lion’s mane is purported to increase Nerve Growth Factor (NGF) levels, which protects us against degenerative brain diseases that contribute to memory loss

Lion's Main Social Chatter

% of wellness conversations mentioning Lion's Main



Source: Brightfield Group; U.S. Wellness Social Listening; May 2023

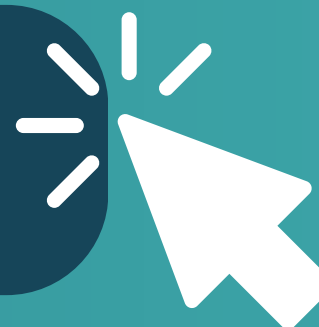




Stay ahead of all the wellness trends!

The data is yours to explore with Brightfield Consumer Insights & Social Listening

Get in Touch!



About Brightfield Group



Brightfield Group is the leading social listening-enabled research firm serving the global cannabis, CBD, and emerging wellness industries.

We combine traditional research expertise with AI-integrated social listening to provide a deeper level of consumer insights.

Marketing, innovation, and insights leaders have trusted us to help drive customer-centric strategies since 2015.

Learn more about our data at www.brightfieldgroup.com