



WELLNESS TRENDS TO WATCH

WINDING DOWN & AMPING UP

How Americans relieve stress and stay energized in 2023

2023 MID-YEAR REPORT



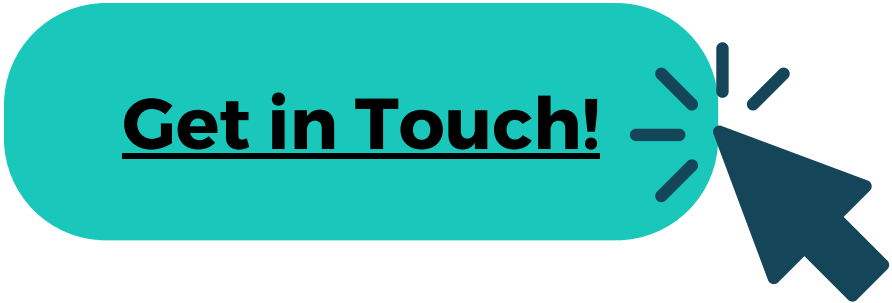
About Brightfield Group

Brightfield Group's AI-driven consumer insights and social listening help marketing and innovation teams see the person behind the trend.

Informed by predictive AI integrated with **survey** and **social media** data, our data has the answers innovators need to make decisions confidently.



Problem	Solution  BRIGHTFIELD GROUP	Outcome
I need more <u>customers</u>	Category-specific consumer insights across brands and channels	Double your customer base!
I don't <u>know</u> what product to develop next	Social listening into trending products, flavors, and ingredients + actual consumer adoption across trendy & traditional segments	New product development that is 10x more efficient!





This is our **FREE** report

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

Brightfield Group 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!



Stress & How We Handle It

Brightfield Group's [Wellness Consumer Insights](#) reveal a telling narrative – nearly half of the American population frequently experiences feelings of anxiety and stress. But, this varies by generation.



For Gen Z – the generation with the most reported anxiety – this stress acts as a distraction, landing them with a distinct need for focus. Gen Z is finishing up their schooling and entering the workforce – distractions may abound, but energy-boosting products seem to be a solution.



For millennials and Gen Xers, many are whole-heartedly attempting to find relaxation and relieve stress. Many are also seeing this stress manifest in their gut, making digestive health also a priority.



It's not a surprise baby boomers experiencing stress find themselves with hypertension, but the second-most reported condition of a stressed baby boomer is arthritis – and it's on the rise. Whether causing stress or manifesting as a response to it, arthritis is a growing ailment of the baby boomer generation.

This report explores need states of relaxation and energy, uncovering what Americans are doing to wind down and amp up.



Defining the Relaxation Need State

Distinguished by the unique psychographics of American consumers, Wellness Consumer Insights tracks need states like holistic wellness, digestive health, focus, and community connection. Need states use cluster analysis to define the types of needs consumers are trying to fulfill or control. These are not mutually exclusive, like segments, as people have different needs at different times.

The **relaxation need state** includes consumers wanting to relax and destress, as indicated by their stress levels, mental health conditions, products purchased, and other psychographics.

Over the past year, half of Americans have fallen into the relaxation need state, and it is on an upward trajectory.

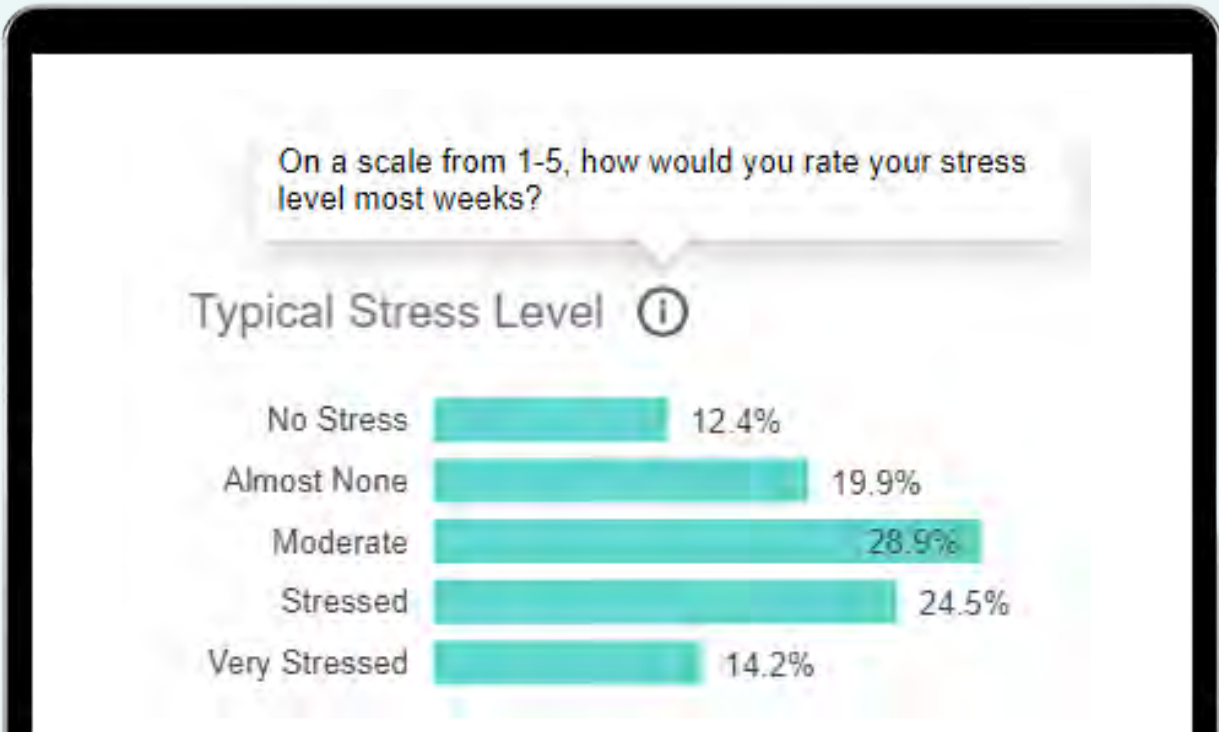


The Data Behind Anxiety

Of those who report having anxiety as a medical condition, a striking **77%** of these individuals have been medically diagnosed, while the remaining **23%** self-diagnose

4 in 10 of these consumers report experiencing anxiety on a near-daily basis.

Outside of those with anxiety as a condition, we see **39%** of American consumers rating their weekly stress level as "stressed" or "very stressed."



Generational Stress Divide

Overall, **28% of Americans report anxiety, but generation matters**

Gen Z, millennials, and Gen X instance of anxiety is within six percentage points – 33% to 39% - while baby boomers’ anxiety is distinctly less at 16%. With the economy and social issues in turmoil, those with the farthest view of the future are experiencing more anxiety.

Rows	Boomer	Gen X	Gen Z	Millennial
Anxiety	16.2%	32.6%	38.6%	35.5%

CROSS TABS ANALYTICS HELP YOU FIND THE TRENDS FAST IN BRIGHFIELD'S WELLNESS CONSUMER INSIGHST PORTAL

What are Americans Doing to Relax?

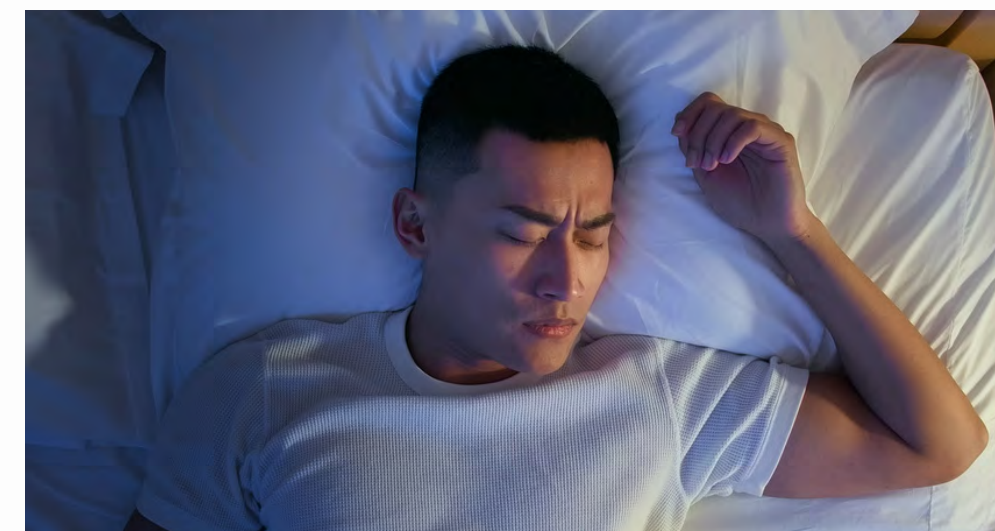
Wellness Consumer Insights shows the top three reported stress tactics are:

1. “Listen to Music or Watch TV”
2. “Go for a walk”
3. “Get enough sleep”

Generationally, baby boomers are the most likely to “**go for a walk**” to relax, while Gen Z (the most stressed generation) is the least likely. **Connecting with friends** is also a stress tactic baby boomers over-index for. Moving your body and spending time with loved ones for mental health appears to be doing the baby boomer generation well.

Meanwhile, the more-stressed Gen Z and millennials over-index for more **specific (and expensive) stress-relief tactics** like talking to a therapist, taking supplements, using functional foods, and acupuncture/massage.

Younger consumers are trying **unique methods of relaxation**, possibly because their stress level is too much to manage with simple movement and socialization. But the inverse could also be deduced – that their reliance on new-age stress relief isn’t working as well as simpler ones. Either way, the generations are taking unique approaches to their relaxation.

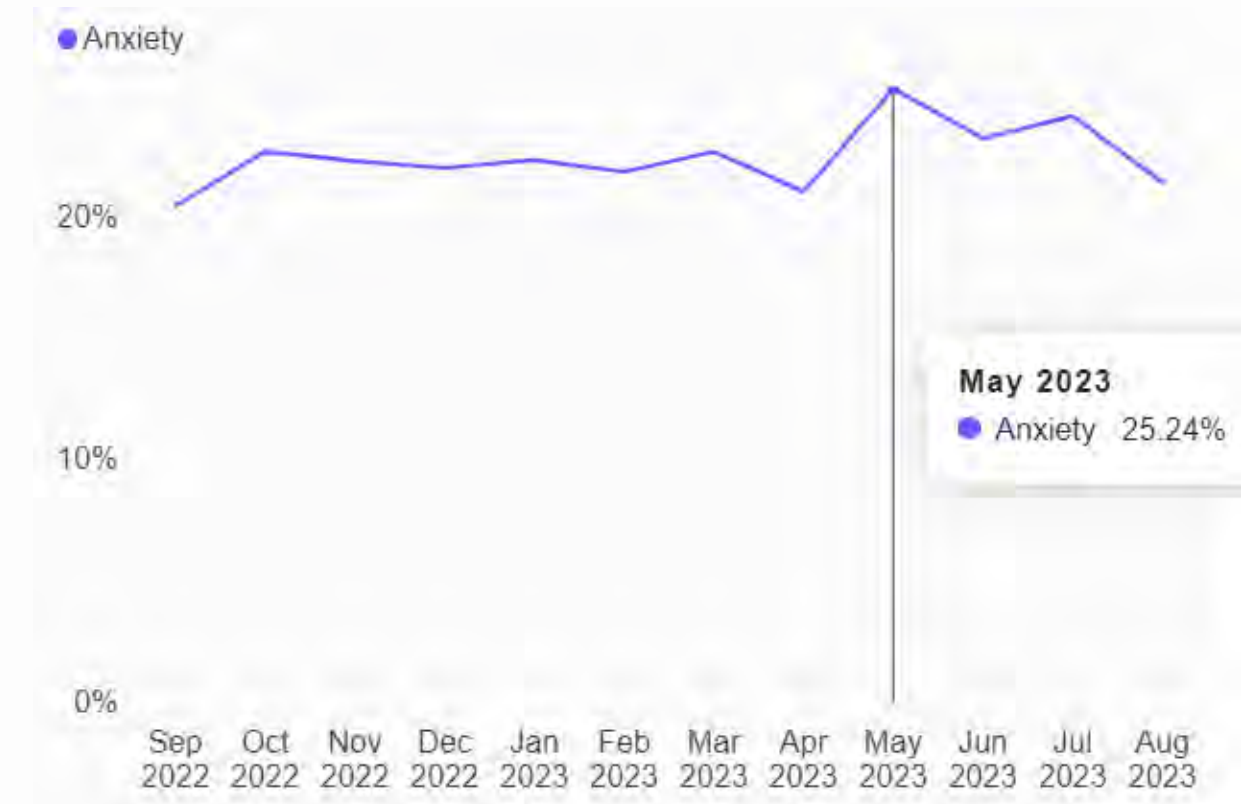


Digital Pulse on Relaxation

Wellness Consumer Insights shows us that 48% of anxiety sufferers opt for prescription medications on a daily basis. **29% rely on natural supplements, highlighting a significant segment moving towards holistic alternatives.**

In Brightfield Group's Wellness Social Listening data, there was a prominent spike in social posts about relaxation and anxiety in Spring 2023, indicating a society actively voicing their stress and brands offering products for relaxation.

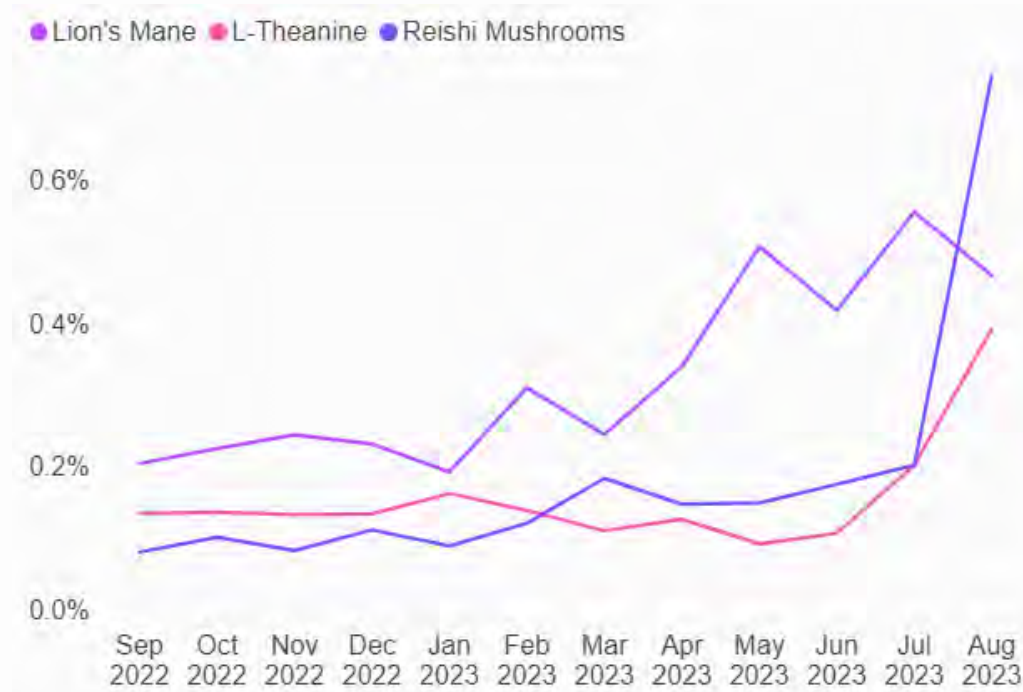
Looking at this data, we can uncover the holistic alternatives used by consumers and suggested by internet media/influencers that guide the trend.



Relaxation Supplements from Social Listening

Wellness Social Listening reveals how consumers and brands talk about ingredients on social media. In the last year, the following trends have emerged:

- **Lavender** remains a dominant topic of discussion, likely due to its wide application as a supplement, aroma therapy tool, and even flavor (lavender lemonade, anyone?)
- Emerging ingredients like **Lion's Mane**, **L-theanine**, and **Reishi Mushrooms** are witnessing increased mentions. Adaptogenic mushrooms at large are gaining popularity for stress relief and relaxation.
- **Magnesium** garnered significant attention in the spring, and chatter about the ingredient continues to maintain.



Stress on Social

Brightfield Group Wellness Social Listening provides high level trends and posts on the ground floor. Here, we see what's on consumers' feed for relaxation.

X (TWITTER)



welovecaring
@welovecaring

#Health benefits of #Ashwagandha :
reduces #anxiety levels. #Ashwagandha
blocks the #stress pathways in the #brain
by #regulating the #chemical signals in
the #nervous system.



INSTAGRAM



How Mental



ellory smith spooky & hot
@ellorysmith

have you ever been chilling minding
your own business and realize your
jaw has been tightly clenched for the
last 15 years



How Mental Drop three 🤔🤔🤔 in the
comments if this is you! ❤️ I swear I was
BORN with my jaw clenched! I can tell
when my anxiety is getting bad again by
how often I realise I'm clenching it...I never
even realised until recently but I grind my
teeth sooo bad in my sleep and it all comes
down to this some kind of
stress/control/anxiety malarkey! Luckily
I've got my super sexy night guard to help
with that 🤔🤔 I've also tried other things
like writing down everything I'm worried
about before bed, drinking camomile tea
before I sleep and COATING my pillow in
lavender spray: But nothing really seems to
stop me from doing it! Anyone got any
good tips for helping with jaw clenching??
Like, for real 😊

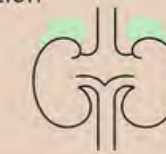


Wellness Doctor



What most people think heals their adrenals

- Adaptogens
- Deep Breaths
- Matcha
- Meditation



@dr.mansivira

Note: this post is referring
to the term "adrenal
fatigue" which is NOT the
same as conditions
involving adrenal
hypofunction.

What really heals your adrenals

- Restorative Sleep
- Healing Traumas
- Balancing blood sugar
- Cold/contrast showers
- Morning Sunlight
- Nourishing the Gut
- Vagus Nerve Stimulation
- Hydration
- Grounding
- Self-Love
- Real Food



Wellness Doctor There is so
much more that goes into
healing the adrenal glands,
symptoms of which include
fatigue, brain fog, gut dysbiosis,
anxiety, hypertension, burnout
and the list goes on.

Adaptogens, breathwork,
meditation, and things like L-
theanine in matcha are
POWERFUL tools to help heal
the adrenal glands.

But there is so much more to
that. Healing any condition
requires a holistic approach -
mental, emotional, physical, and
even spiritual.

On the right side of this graphic
is a list of some additional tools
to help heal the adrenal glands
from the functional medicine

Innovation Opportunity: Relaxation

Relaxation is multi-faceted. The data demonstrates that while many Americans resort to time-tested relaxation methods like watching TV or going for a walk, there's a burgeoning interest in more nuanced relaxation techniques and remedies, especially among younger generations.

The challenge and opportunity lie in integrating traditional and emerging relaxation solutions. Developing products or experiences that combine time-tested methods with holistic remedies can offer consumers a richer, more comprehensive relaxation experience.

As the narrative of relaxation evolves, it's those brands and products that bridge the gap between the old and new that will resonate most deeply with today's consumers.

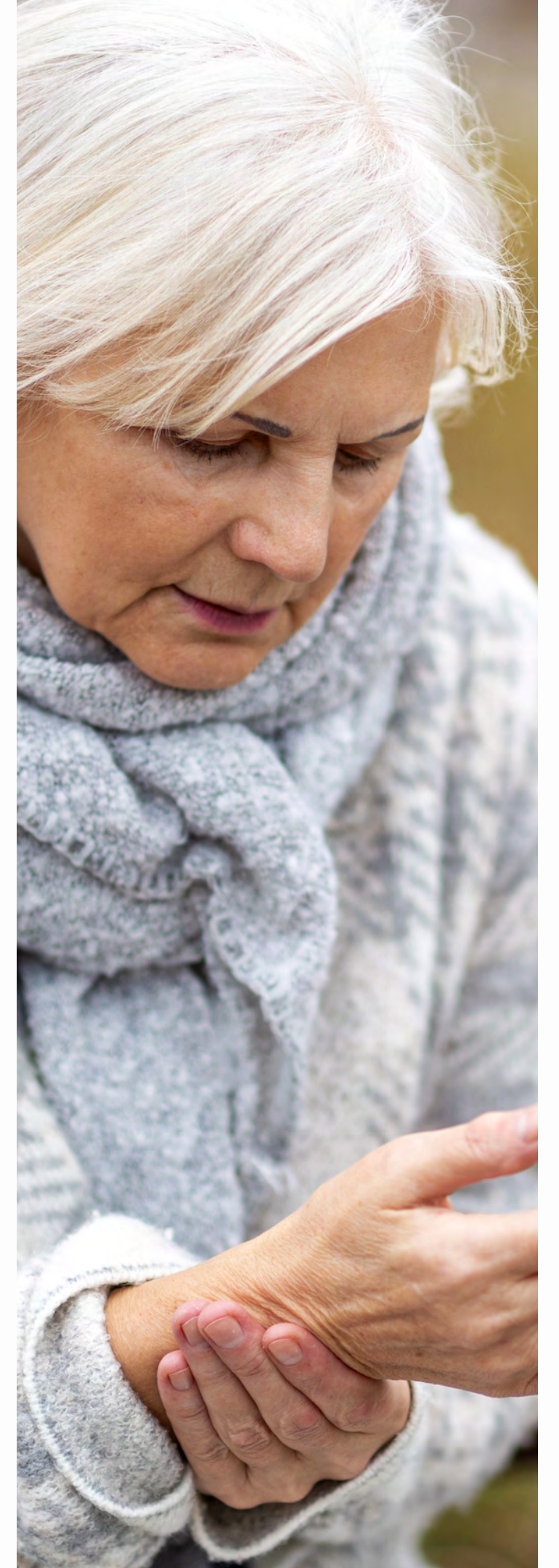


Condition Highlight: Arthritis and its Link to Stress

Arthritis, a condition predominantly associated with pain and inflammation in the joints, isn't typically the first thing that comes to mind when discussing relaxation. However, considering the impact of stress and anxiety on physical health, a potential link between these factors becomes clearer.

Recent research has indicated a connection between stress and inflammation, the primary symptom of arthritis. Chronic stress can exacerbate inflammatory responses, leading to heightened pain in arthritis sufferers. **1 in 3 baby boomers in the relaxation need state has arthritis.** Some studies point to poor diet and lack of movement causing arthritis sooner in life, and Brightfield's Wellness Consumer Insights shows **21% of Gen Xers in the relaxation need state suffer from arthritis.**

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



Social Listening: Natural Supplements for Inflammation

Wellness Social Listening shows that social conversations around arthritis, joint pain, and fibromyalgia have been steady this year, as well as conversations around ingredients purported to help with arthritis pain.

Curcumin and Turmeric: Both ingredients are derived from the turmeric plant and have been historically used in Ayurvedic practices to combat inflammation. Their consistent chatter on social platforms indicates an acknowledgment of their benefits.

Irish Moss: This sea moss has recently caught the public's attention, showing an uptick in mentions. Known for its rich mineral content and potential anti-inflammatory properties, its increased popularity aligns with the trend of seeking natural remedies.



Wellness Blog Curcumin is a polyphenol compound in the spice turmeric that helps reduce inflammation in the body - it exerts tremendous health and anti-aging benefits.

Curcumin helps eliminate senescent cells (majority are dying cells that promote inflammation), increases telomere length, protects against glycation, activates AMPK and autophagy -- all become dysregulated or imbalanced as we age.



Wellness Company Looking for a natural way to support your overall health and wellness? Look no further than our Turmeric Advance Tablets! 🌿💪 Our unique formula combines the power of Nano-solubilized Curcumin (for enhanced absorption) and standardized 95% Piperine (known as Bioperine. Piperine is the bioactive compound derived from black pepper) to help you maintain a healthy inflammatory response, support joint health, and boost your immune system. 🙌



Sea moss is rich in vitamins and minerals that are essential for muscle recovery and growth. It contains high levels of magnesium, potassium, and calcium, which help to reduce inflammation and promote healthy bone density. [#seamoss](#) [#healthylifestyle](#) [#rawseamoss](#)



Innovation Opportunity: Arthritis

For marketers and product developers in the wellness space, understanding the nexus between arthritis, relaxation, and natural remedies offers a unique opportunity.

Formulating products that both cater to arthritis relief and promote relaxation can address the multi-faceted needs of middle-aged and older consumers. Combining these elements may lead to solutions that provide comprehensive relief – physically, mentally, and emotionally.



Energizing America

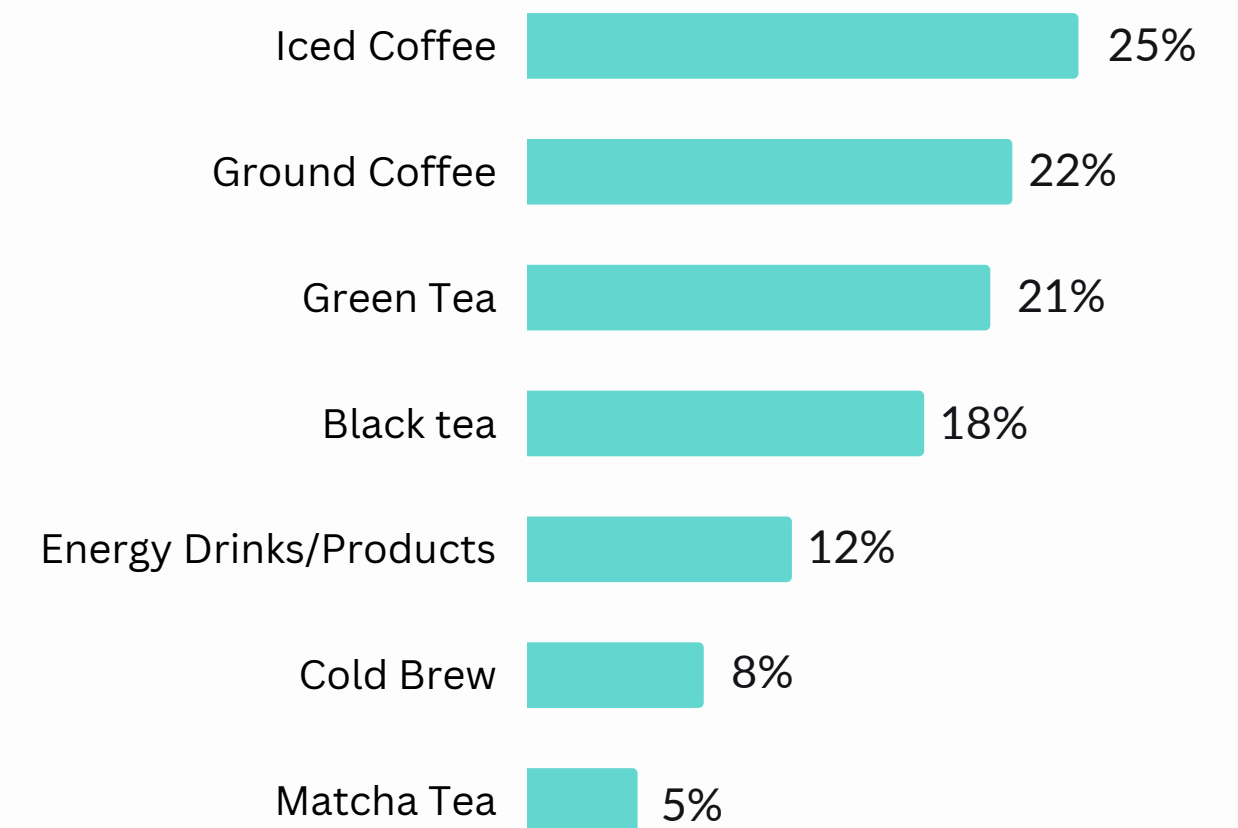
From the early morning coffee rituals to the afternoon pick-me-ups, America's quest for energy is a persistent narrative. Today, the landscape of energy sources is transforming, indicating a changing consumer palette and a broader exploration of energy-boosting products. This trend runs parallel to last quarter's analysis of sleep – to get more energy, there's more sleep, or there are products that give you energy.

Caffeine, in its many forms, continues to be the quintessential energy booster for many. But there's more to the story than just traditional coffee.

While Wellness Consumer Insights reveals iced coffee garners 25% of consumer purchasing and ground coffee 22%, alternative energy sources are seeing a surge in interest. Energy drinks, cold brews, and matcha tea are increasingly being sought after, suggesting consumers want varied sources of energy. It's not just about the caffeine hit; it's also about the convenience. **The top reason energy drink users say they purchase it in addition to coffee/tea is “I am on the go.”**



Products Purchased in the Past 3 Months



The Energy Consumer

41% of American consumers are in the energy need state.

Skew Female

While energy drink commercials of the past may lead you to believe that men are the core group, women make up 52% of those in the energy need state.

Younger Consumers

Those aged 21 to 44 over-index for the energy need state while those older than 45 under-index. Older consumers start seeing increasing concerns for other issues like heart health.

Not Solely Defined by Income

Economic status doesn't drive the energy need state. Americans in lower, middle, and upper incomes are in need.

More Likely to Have Multiple Children

53% of those with 2+ children are in the energy need state. Adults with only one child are about as likely to be in this need state as the average American.

Live in a City

While the over-index is small, those in the energy need state are 7% more likely to live in a city. This could be due to the abundance of energy drinks and coffee options available in cities.



Social Listening: Matcha & B12 Chatter

Brightfield Group Wellness Social Listening shows the ingredients matcha and B12 are witnessing a surge in online chatter - especially among younger generations.

Mainstream Matcha: Once a niche product, matcha tea is now a mainstream favorite. Its rise in popularity, evident in social media spikes during April and consistent chatter throughout the summer, suggests a broad acceptance. The DIY trend is strong with matcha; platforms like Pinterest are flooded with home-based matcha recipes, signaling a trend of homemade energy boosts.

B12 Breakthrough: While B12 shots have been around, their accessibility and popularity have skyrocketed recently. Social media is awash with influencers and health enthusiasts discussing the benefits of B12 products, hinting at its widespread acceptance.

 **Nutrition Blog**
B12



Nutrition Blog Vitamin B12 is essential to nerve and cell health. It is not often found in plants or plant-based foods, with the exception of nutritional yeast, mushrooms, and sea veggies (algae). If you are vegan, vegetarian, or plant-based, you WILL need to supplement it. Common B12 deficiencies are fatigue, tingling, poor memory.



 **Wellness Blog**
Matcha



Wellness Blog Made a matcha this morning and I haven't made one in a while and it is exactly what I needed!!

I was craving some sort of cream to make it a little sweeter and I had some coconut cream so decided to try that for the first time and woah!! Why have I not added coconut cream to my matcha before?? It's so good!! It adds the perfect level of sweetness without me having to add any other type of sweetener.



Social Listening by Generation

When parsed through a generational lens, these trends become even more pronounced. Generational predictions in Wellness Social Listening allow us to see how different consumer segments experience a trend.

Gen Z & Matcha: This generation has an incredible 37% growth rate in matcha discussions. Their affinity for the product is reshaping the energy market.

Millennials & B12: The B12 trend finds its stronghold among millennials, with a 38% growth rate. This indicates that millennials are on the lookout for quick, effective energy boosts that can be easily integrated into their busy lives.

Predicted Generation				Predicted Generation			
Gen Z				Millennial			
Products	Share of Voice	Actual Growth	Growth Rate	Products	Share of Voice	Actual Growth	Growth Rate
Matcha Tea or Latte Powder	0.09%	0.59%	37.22%	Matcha Tea or Latte Powder	0.25%	1.28%	20.23%
B-12	0.35%	0.88%	11.56%	B-12	0.29%	1.22%	17.08%



Innovation Opportunity: Energy Drinks

It's a world where sleep meets energy, where convenience meets health, and where tradition meets innovation. By bridging these dualities, we can better anticipate the future of the energy market.

Highlighting specific ingredients that are proving favorable among your target audience and speaking to why your customers come to you to fulfill their need for energy is key.

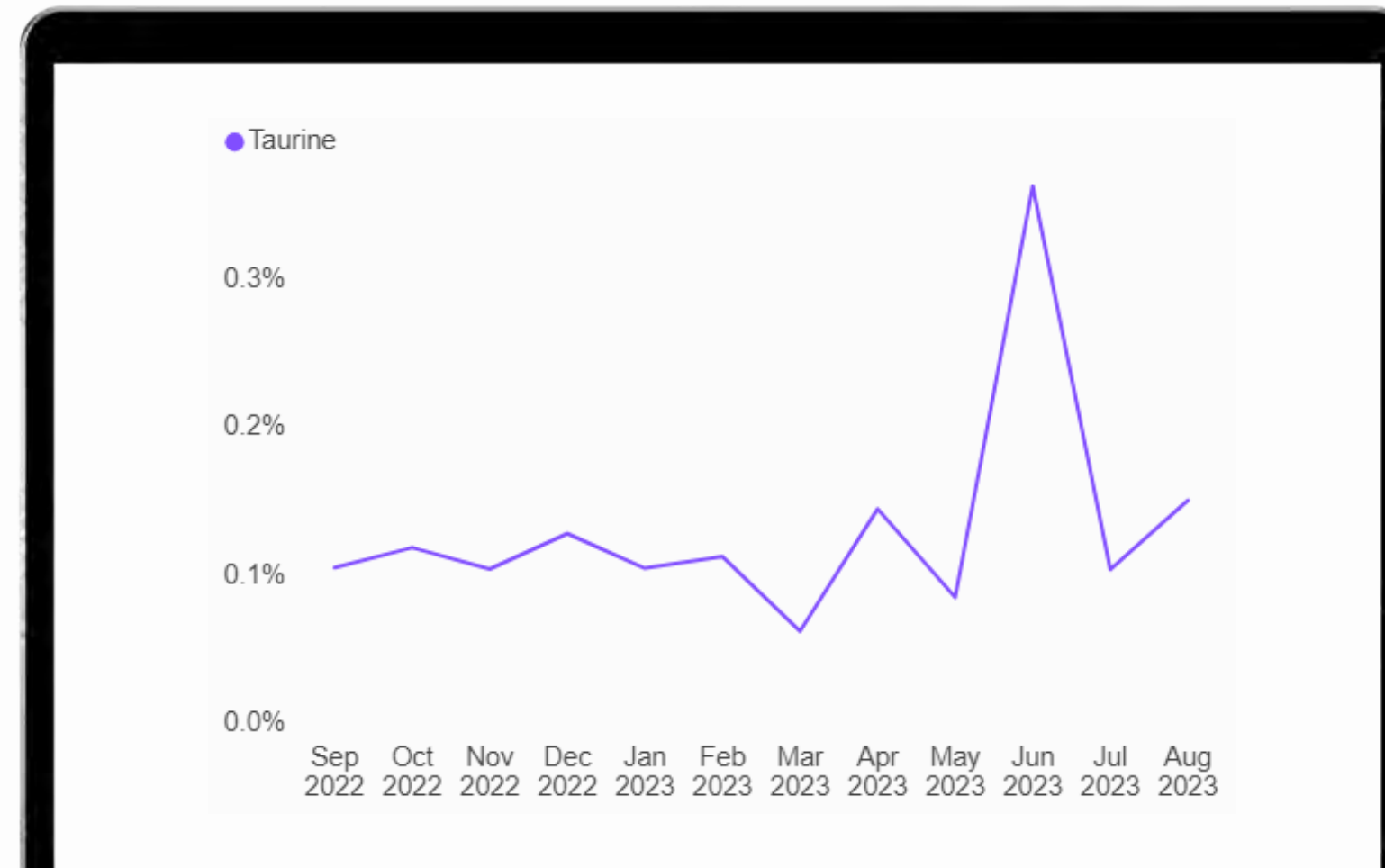
Not just for a Jolt: Taurine in Energy Drinks

Taurine is added to energy drink formulations for its role in energy production and its purported calming effect despite the heightened energy. However, a study released in June 2023 propelled this ingredient into the spotlight for a different reason: anti-aging.

Taurine deficiency is a driver of aging in animals, according to a new study published in Science Magazine. Mainstream media and influencers alike took to socials to share the finding about this overlooked energy drink ingredient.

Further research is needed to verify this is also true in humans, but that isn't stopping people from talking about it. After Brightfield Group Wellness Social Listening caught a sharp spike in June 2023, two months later, in August 2023, conversations around taurine are still higher than they were last year.

Source: Brightfield Group; Wellness Social Listening; August 2023



Innovation Opportunity: New Benefits of Old Ingredients

For those hot on the energy trend, the prospect of anti-aging is likely very alluring. Young female consumers are especially attuned to staying looking young- as is seen in the trendiness of skin supplements like collagen and the addition of retinoids in Gen Z skincare routines.

Energy drink brands targeting women would be wise to campaign about the taurine in their products on the heels of this news.

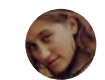
Marketers – forget planning content around generic “days” - Lavender Day will never be as impactful as a data-driven campaign that touches on the hot topics most relevant to your target audience.



Taurine Company
@taurinecompany



New study reveals that taurine, an ingredient commonly found in [#energydrinks](#), may be the key to slowing down aging. Initial trials showed it extended the lifespan of mice by up to 10-12%. Further trials in humans are now recommended by scientists. [#Health](#) [#AntiAging](#) [#TAURINE](#)



Nutrition Blog
Taurine



Nutrition Blog Taurine is an amino acids that can be beneficial to your BRAIN, HEART, and MUSCLES.

- 🧠 Calming effect
- ❤️ Heart health
- 💪 Muscle recovery and endurance
- ♻️ Metabolic health

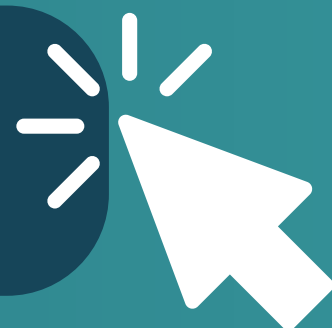




Stay ahead of all the wellness trends!

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

[Get in Touch!](#)

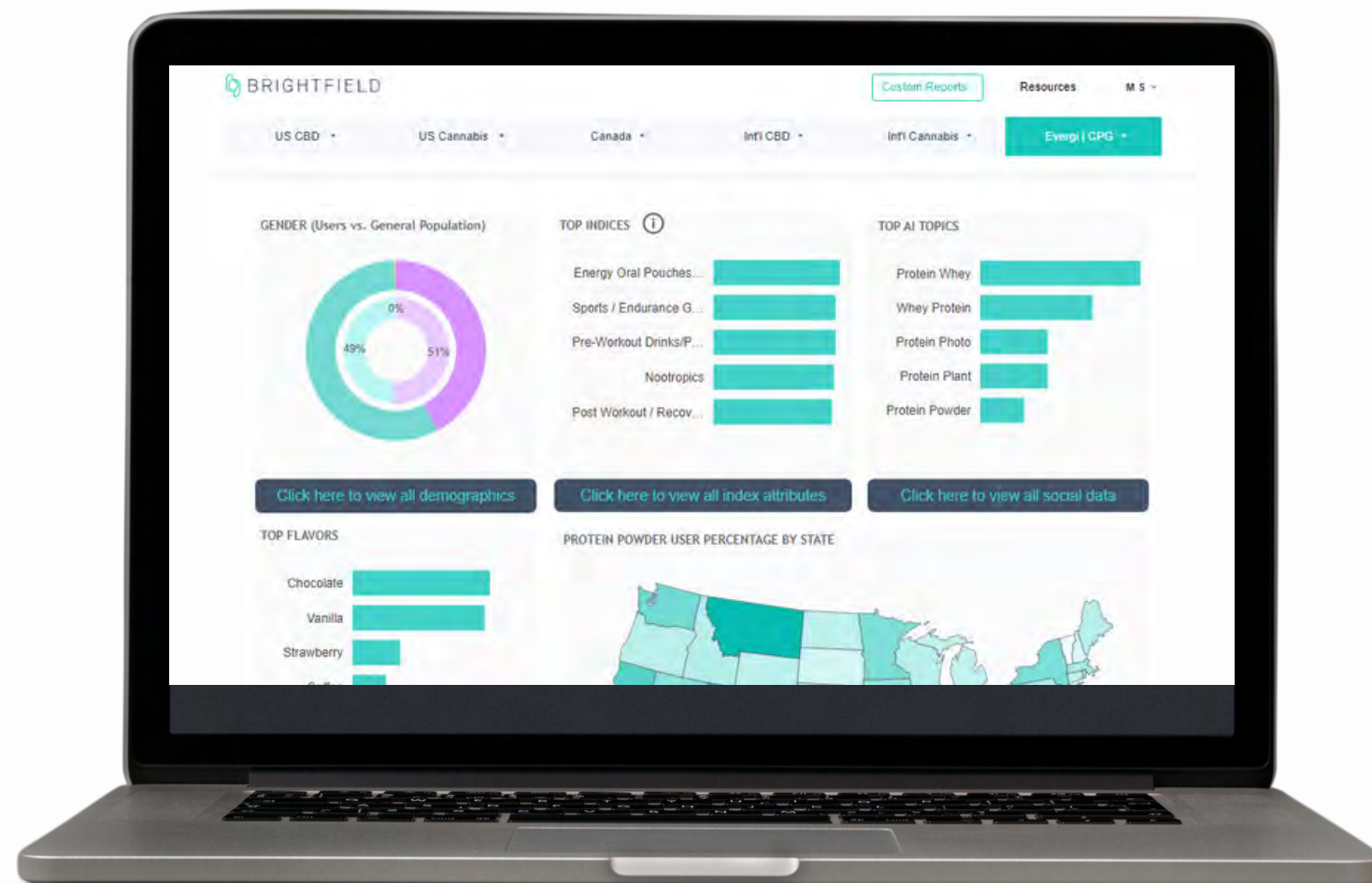




Consumer Insights that Connect

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's AI-driven consumer insights and social listening help marketing and innovation teams see the person behind the trend. Informed by predictive AI integrated with survey and social media data, our data has the answers innovators need to make decisions confidently.

[Learn more about our data at www.brightfieldgroup.com](https://www.brightfieldgroup.com)