



SHROOM BOOM, KAVA CLIMB AND SUGAR SCRUTINY

2024

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!

WELLNESS SURVEY & SOCIAL LISTENING

 BRIGHTFIELD GROUP Built by insights people for insights people!

SURVEY DATA

Over 40,000 consumers surveyed



Questionnaire fielded quarterly since Q3 2021 with dynamic edits to account for the latest trends over time



Quotas & weighting were used to achieve a nationally representative sample, including age, gender, income, & region



Wellness-oriented questions that reveal attitudes, behaviors, & purchasing of over 150 products



SOCIAL LISTENING

Over 10 million conversations collected since 2021

Posts tagged by Need State, Product, Ingredient, Flavor, & Condition using AI-enabled machine-learning & natural language processing



Posts pulled based on wellness-focused hashtags & topics

Neural network training to help AI predict gender, age, and persona



Wellness Attitudinal and Behavioral Segmentation of U.S. Adults

Least Trendy

Most Trendy

Detached
Traditionalists

Not into the latest fads or wellbeing trends, They are more comfortable doing things the traditional way and using traditional products/ingredients.

Self-Focused
Savers

These budget conscious consumers are focused on more traditional, less intense and basic wellbeing habits that improve their health.

Better-Way
Believers

Wholesome idealists are focused on bettering their bodies and the planet through "*the right way*", "*the better way*", "*the traditional way*" or trying new "proven ways

Wellness
Seekers

Wellness Seekers are fast followers that pay close attention to the latest wellbeing trends in order to improve their mind and body.

Trendy
Enthusiasts

These trendsetters are total cutting edge wellbeing gurus – they are focused on bettering their mind, body, spirit and the planet with all the latest fads available.



SHROOM BOOM

Functional Mushrooms are EVERYWHERE! And it seems they can help with anything!

Bloomberg

● Live TV Markets ▾ Economics Industries Tech Politics Businessweek Opinion More ▾

Newsletter

Functional Fungi, With Little FDA Oversight, Are the New CBD

RollingStone

All Mushrooms Can Be Magic: Why the Shroom Boom Goes Beyond Psychedelics

You're not imagining things — mushrooms are everywhere.

BY ROBERT JOHNSON

SEPTEMBER 8, 2023

What's Your Health Goal?

WE'VE GOT A MUSHROOM FOR THAT

Mushroom	Health Benefits
Reishi	SLEEP • STRESS SEASONAL CHALLENGES
Turkey Tail	ROBUST IMMUNITY DIGESTION
Maitake	WEIGHT MAINTENANCE BLOOD SUGAR DIGESTION
Cordyceps	ENERGY • EXERCISE LIBIDO • RESPIRATION
Shiitake	LIVER SUPPORT HEALTHY LIPID LEVELS GLOWING SKIN
Chaga	HAIR & SKIN • STRESS DAILY IMMUNITY
Lion's Mane	MOOD • MEMORY FOCUS
Agarikon	MAXIMUM IMMUNE SUPPORT

*This statement has not been evaluated by the Food and Drug Administration. This statement is not intended to diagnose, treat, cure or prevent any disease.

Tracking the Shrooms Boom in Social Media the last 2 Years

Overall Posts by Ingredients



Overall Posts by Products

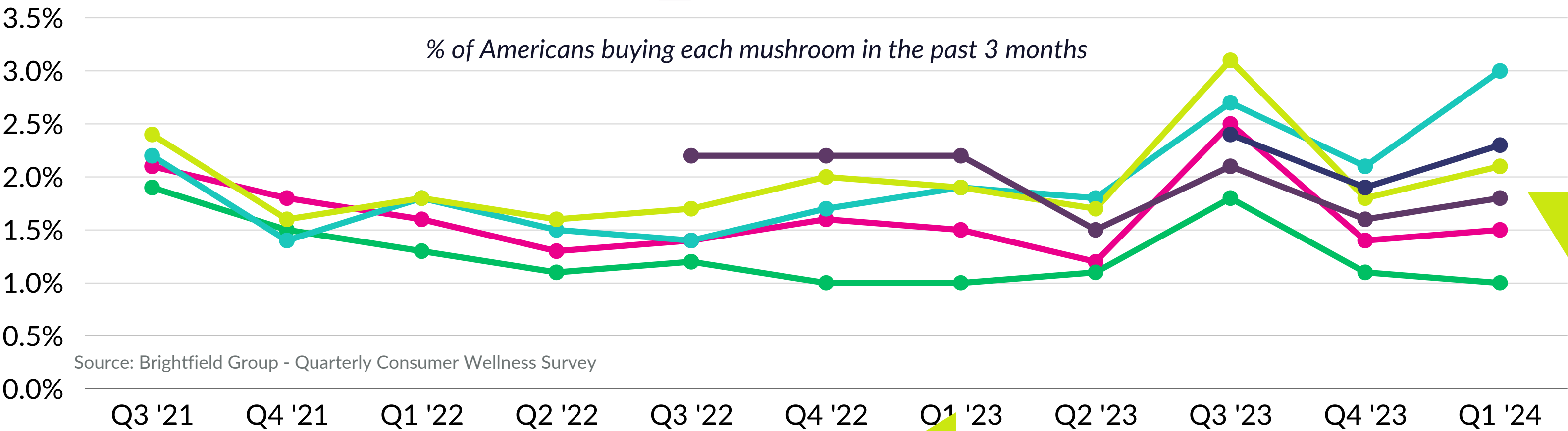


Volume of these posts are round the same as B-12 and Protein bars, Cacao, and Hummus

Functional Mushrooms Starting to Mainstream

Purchasing Mushrooms as an Ingredient, as a Supplement or Mushroom Coffee

Chaga Mushroom Cordyceps Lion's Mane Reishi Mushrooms Mushroom Coffee
Mushroom Supplement



Source: Brightfield Group - Quarterly Consumer Wellness Survey

Q1 2024, Majority are 39% are Better Way Believers

In Q1 2023, Majority (41%) were Wellness Seekers



Who are Functional Mushroom Purchasers?



51%
male



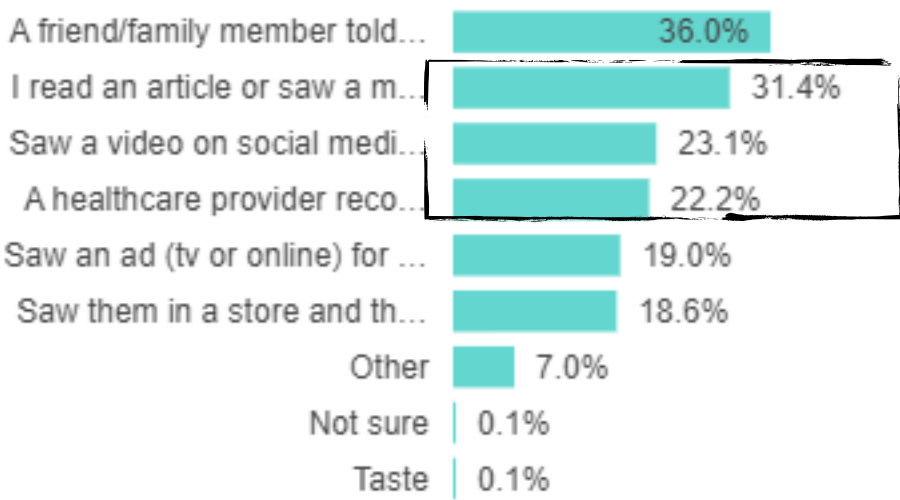
44% are
Millennials



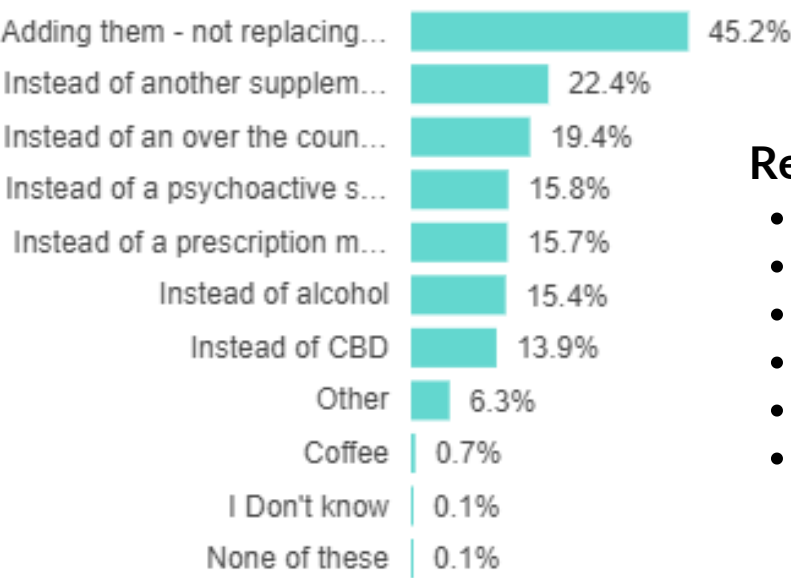
Almost Even Split in Income:
39% are upper income and 31%
middle, 30% lower income

Word of Mouth and Viral Buzz are Triggering Use

Friends and Media Trigger Trial

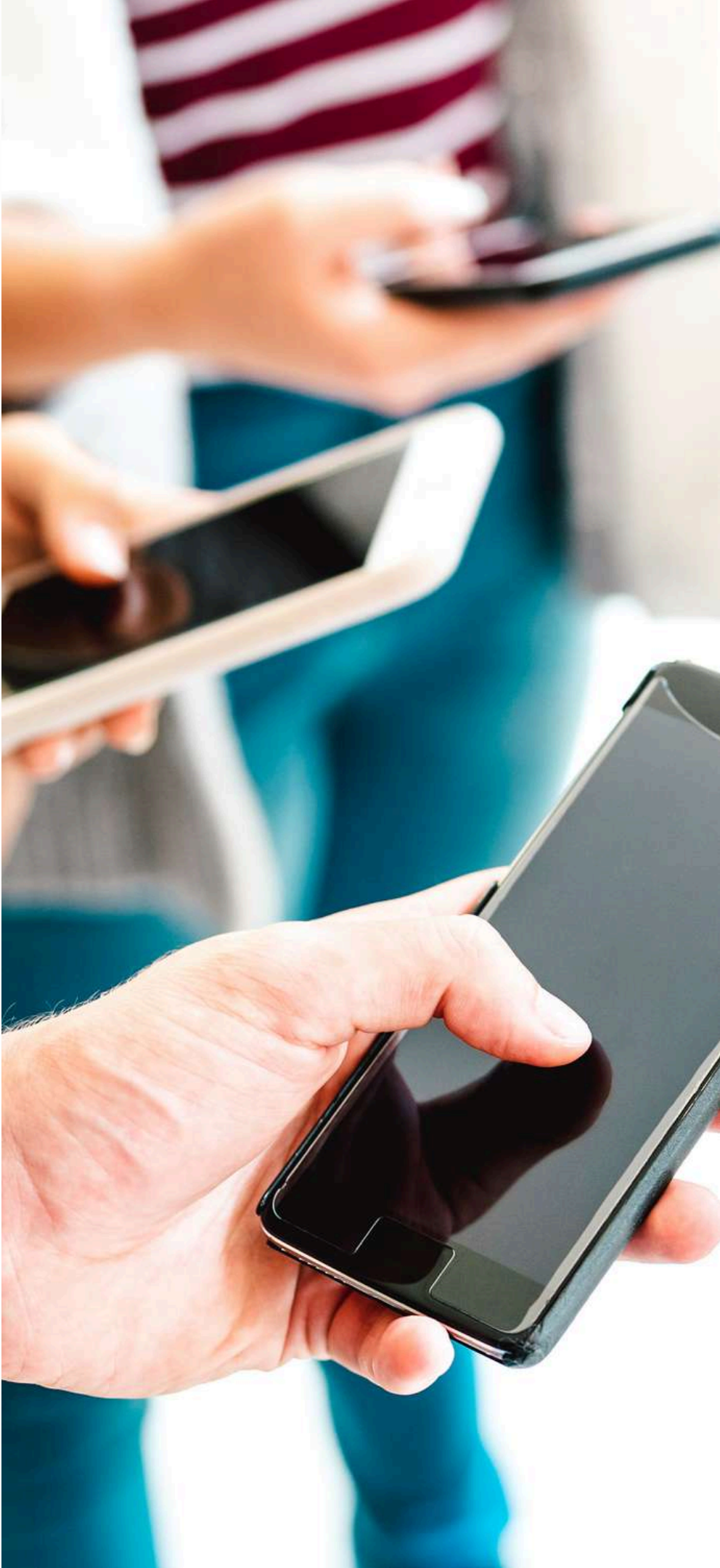


New Use Not Replacement



Replacing

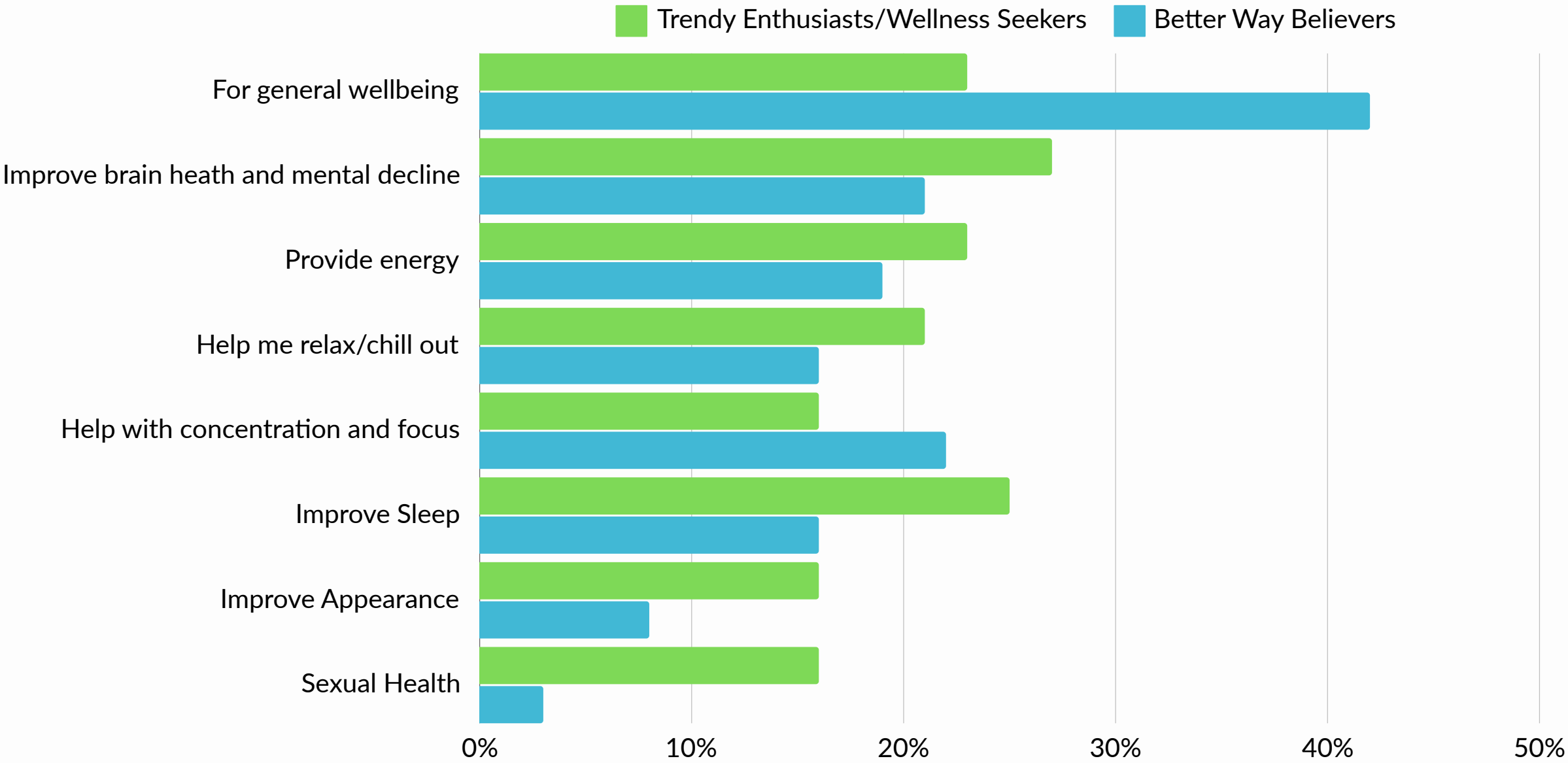
- Other supplements
- OTC Meds
- Psychoactive Substances
- Prescriptions
- Alcohol
- CBD



There's shroom for that...

Better Way Believers are using for general wellbeing while Trendy Enthusiasts and Wellness Seekers are finding more specific use cases beyond general wellbeing

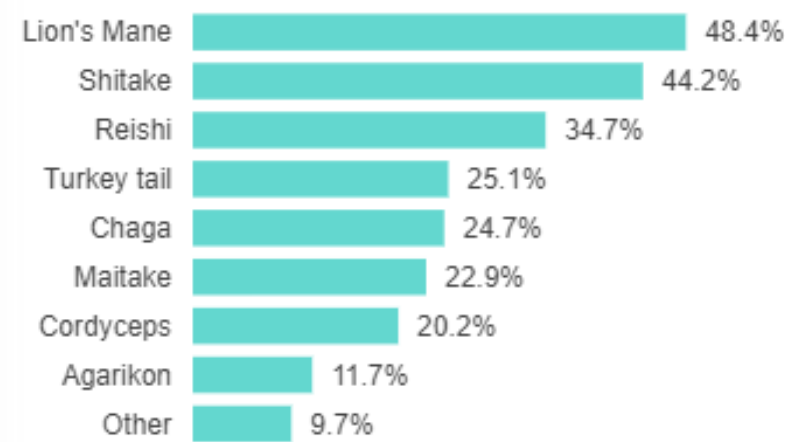
Reasons for Use



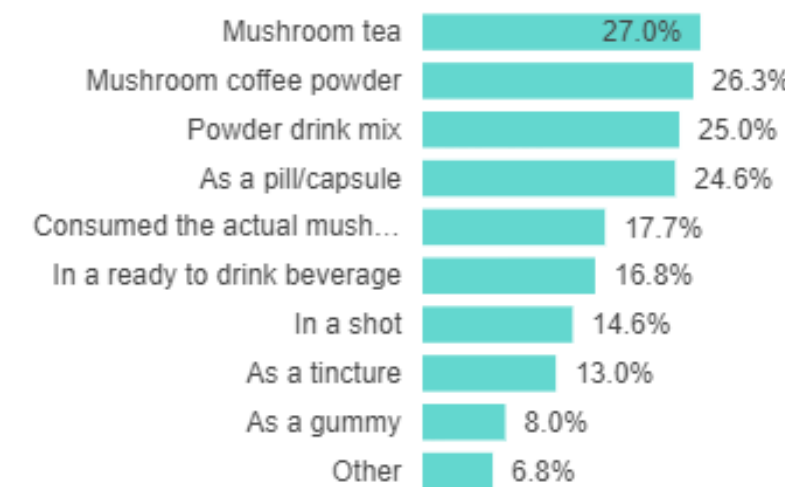
Lion’s Mane most used. Tea and coffee are top forms

Purchasing is mostly on Amazon

Mushroom Type



Mushroom Form

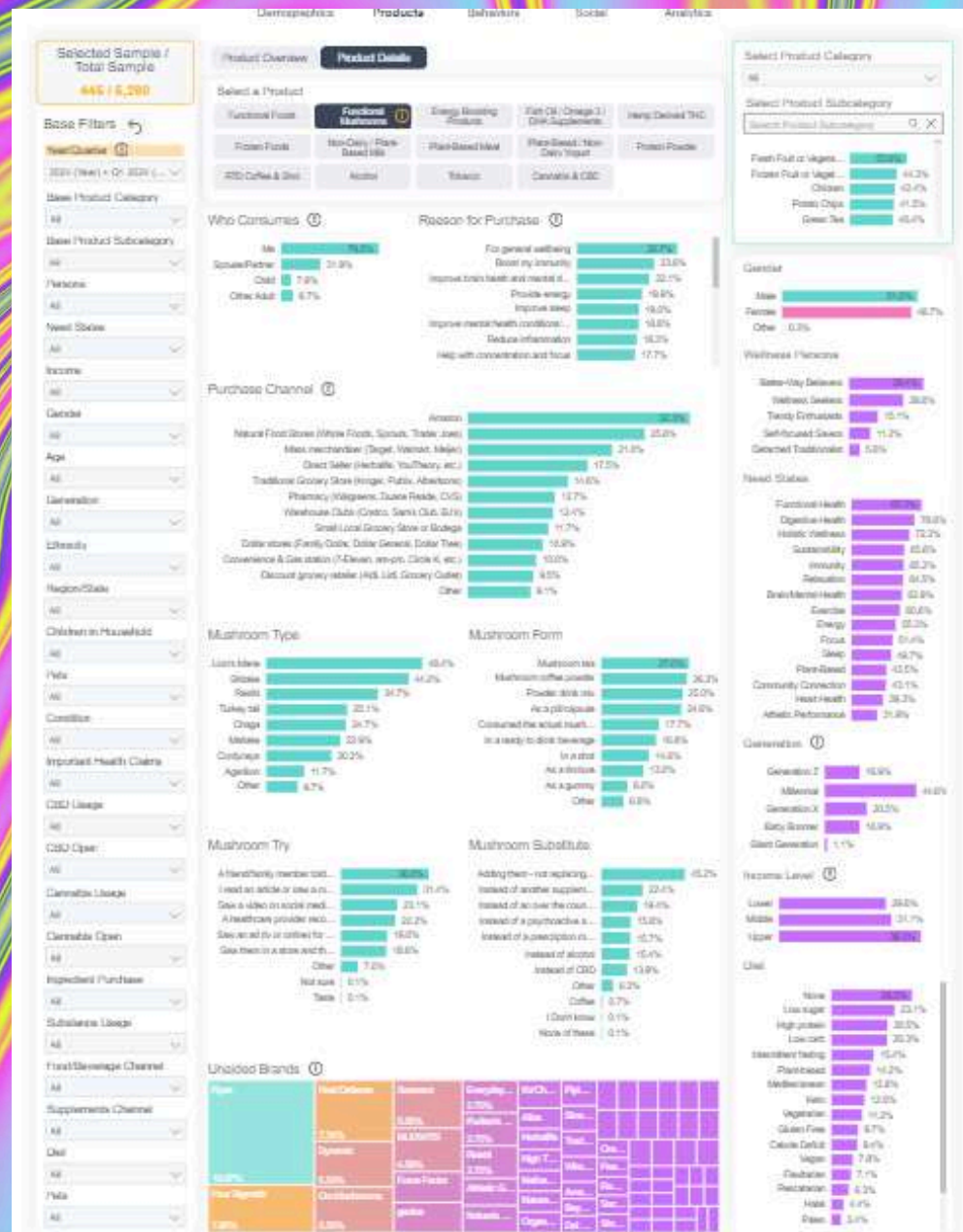


Purchase Channel ⓘ



Source: Brightfield Group - Q1 2024 Consumer Wellness Survey





More Functional Mushroom Data in the Portal

Don't forget we have lots of vice research including extensive research on psilocybin (psychedelic mushrooms), cannabis and kratom

Also a big study on hemp-derived THC coming out soon





KAVA: WILL IT TAKE OFF

What is Kava?

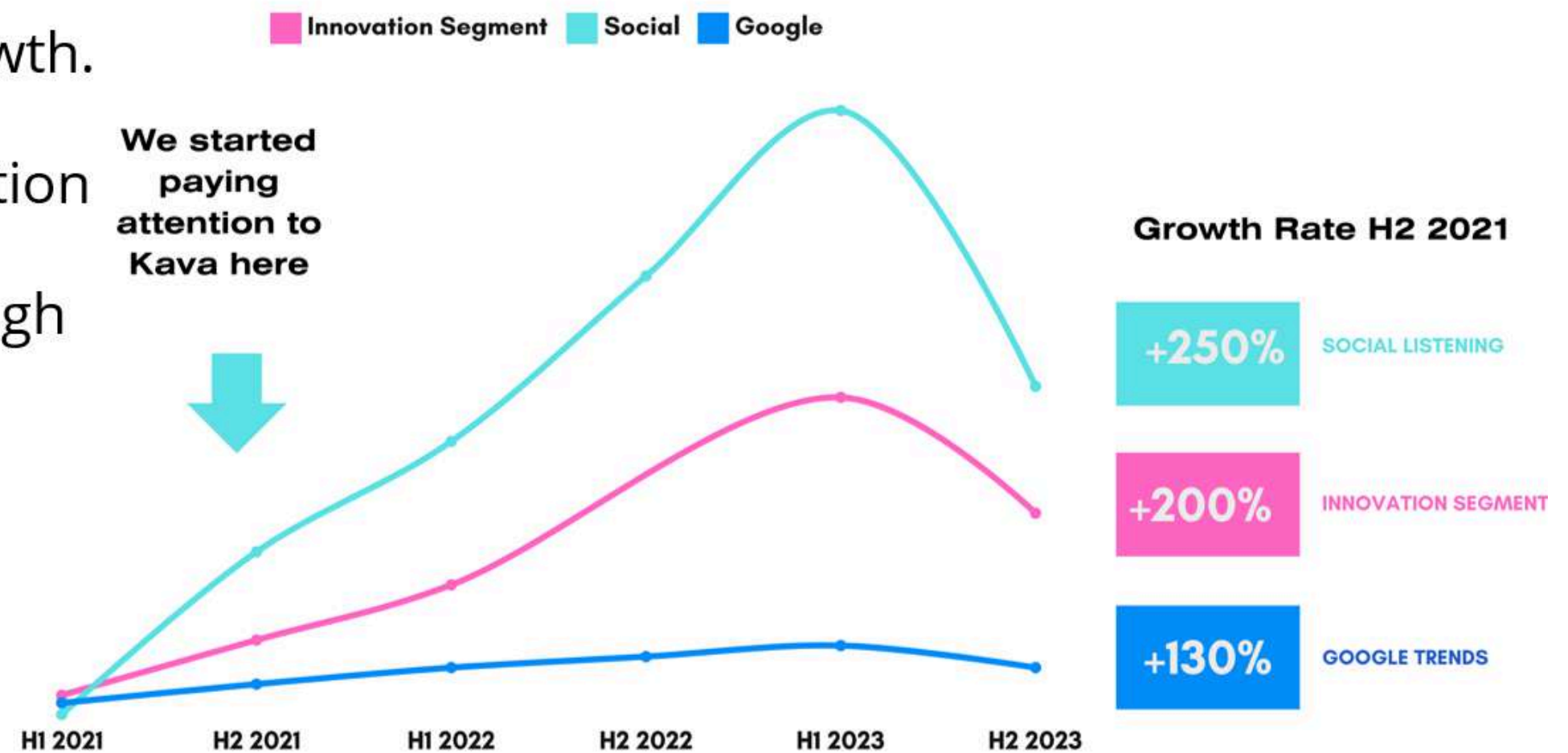
- Herb in the pepper family. The root of the plant is used to produce a drink with sedative, anesthetic, and euphoriant properties.
- Native to the islands of the western Pacific where they have used kava for thousands of years as a medicine and for ritual purposes.
- Kava is promoted as a dietary supplement for anxiety, insomnia, and other conditions. Like alcohol, kava is a depressant, meaning it slows down your central nervous system.
- Kava is heavily regulated in the United Kingdom, Australia, Canada and beyond. And though it's legal in the U.S., that doesn't necessarily mean it's safe.
- Possible link to a risk of severe liver injury.



Kava first caught our attention back in 2021 when we first started to see it growing in social listening. We looked at our Trendy Enthusiasts who are our most innovative target and saw growth also among them. Google Trends showed tentative validation in late 2023. We have confirmed slow increase in sales among partners.

- **Social Listening** Growth signal in H2 2021
- **Validated amongst Innovation Groups:** Innovation segments corroborate growth.
- **Google trends** shows tentative validation
- **Current state** – Growth in sales through 2023 and Presence in distributors.

Using Social Listening for early signals



Kava Bars are becoming Popular and more kava products hit the market

FOOD & WINE

For a Booze-Free Buzz, Americans Are Heading to Kava Bars

Kava bars are an exciting non-alcoholic arrival to cities like Austin, Brooklyn, and more.

PSYCHEDELICS | BARS | FOOD & DRINK NEWS

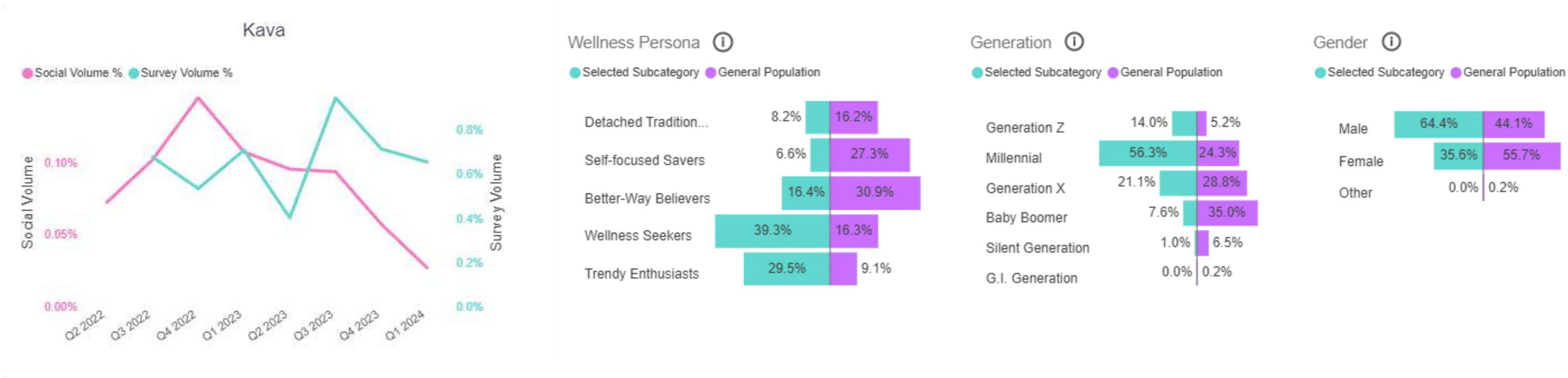
Suited to a Tea: Could Colorado Become the Next Kava Capital?

"A lot of people use it for anxiety...kava appeals to health-conscious people who maybe don't like alcohol, or people getting sober from alcohol."

By Helen Xu | July 5, 2023



Stuck in the emerging phase with Trendy Enthusiasts and Wellness Seekers.
Social Seems to be declining while use and sales are increasing.



Source: Brightfield Group - Q1 2024 Consumer Wellness Survey



KAVA VS KRATOM

WHICH IS BEST?

Ingredients in Kava Posts

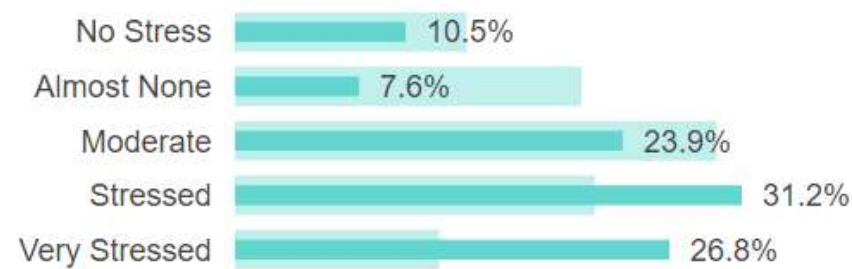


Conditions in Kava Posts

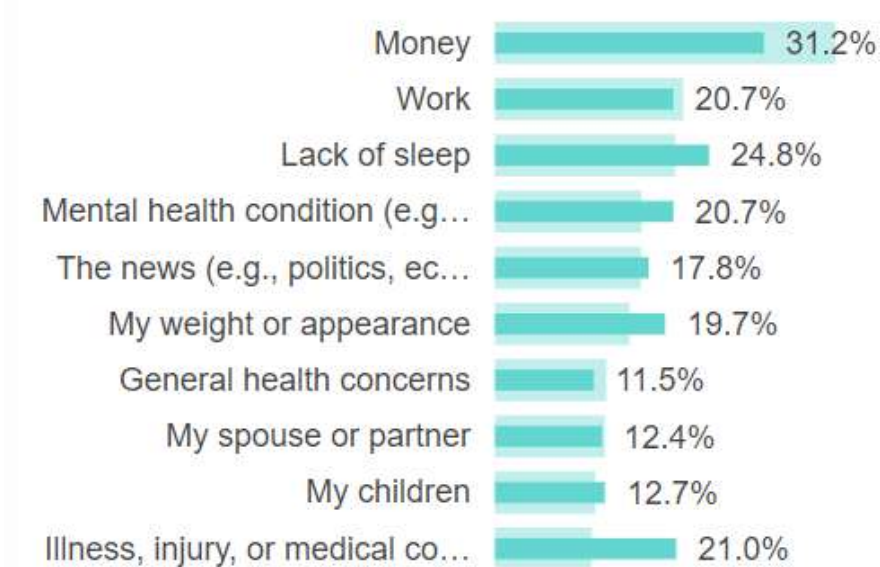


Current Kava Purchasers are Stressed and are turning to substances for relief

Typical Stress Level ⓘ

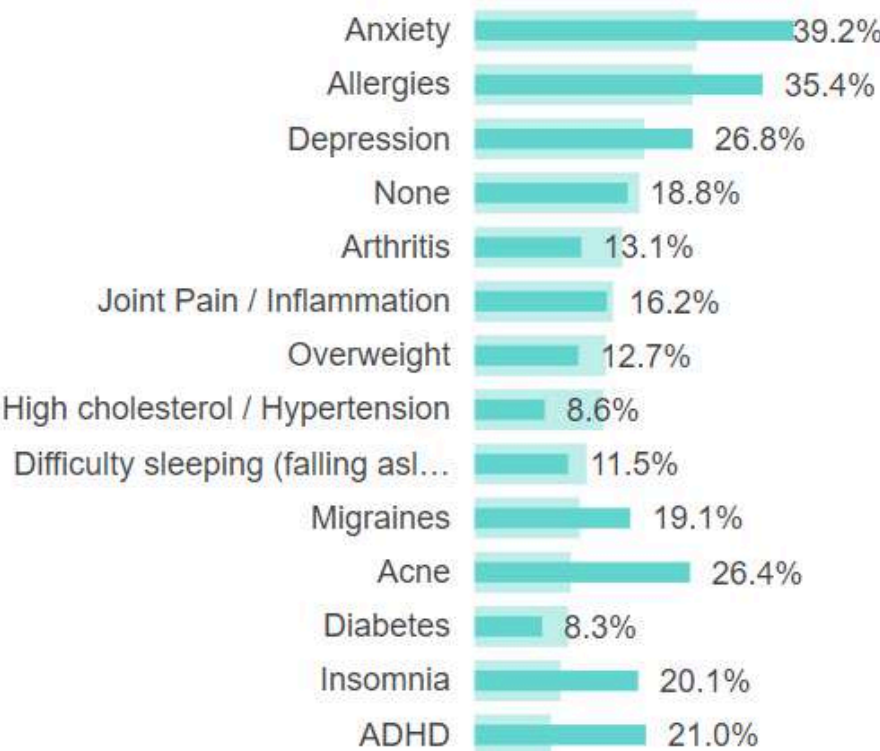


Main Cause of Stress ⓘ

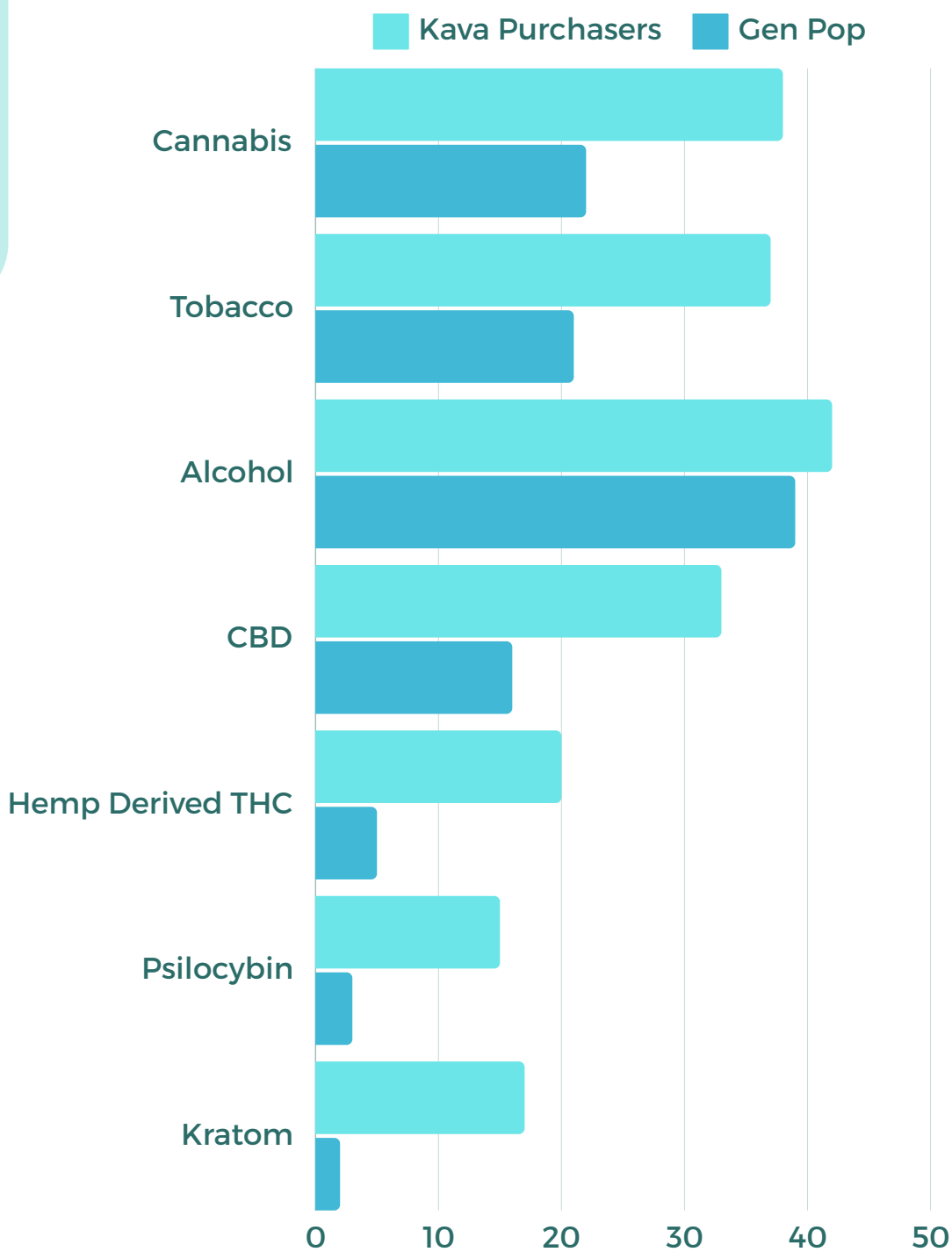


75% of kava purchasers say they are consuming less alcohol vs. 58% of gen pop

Conditions

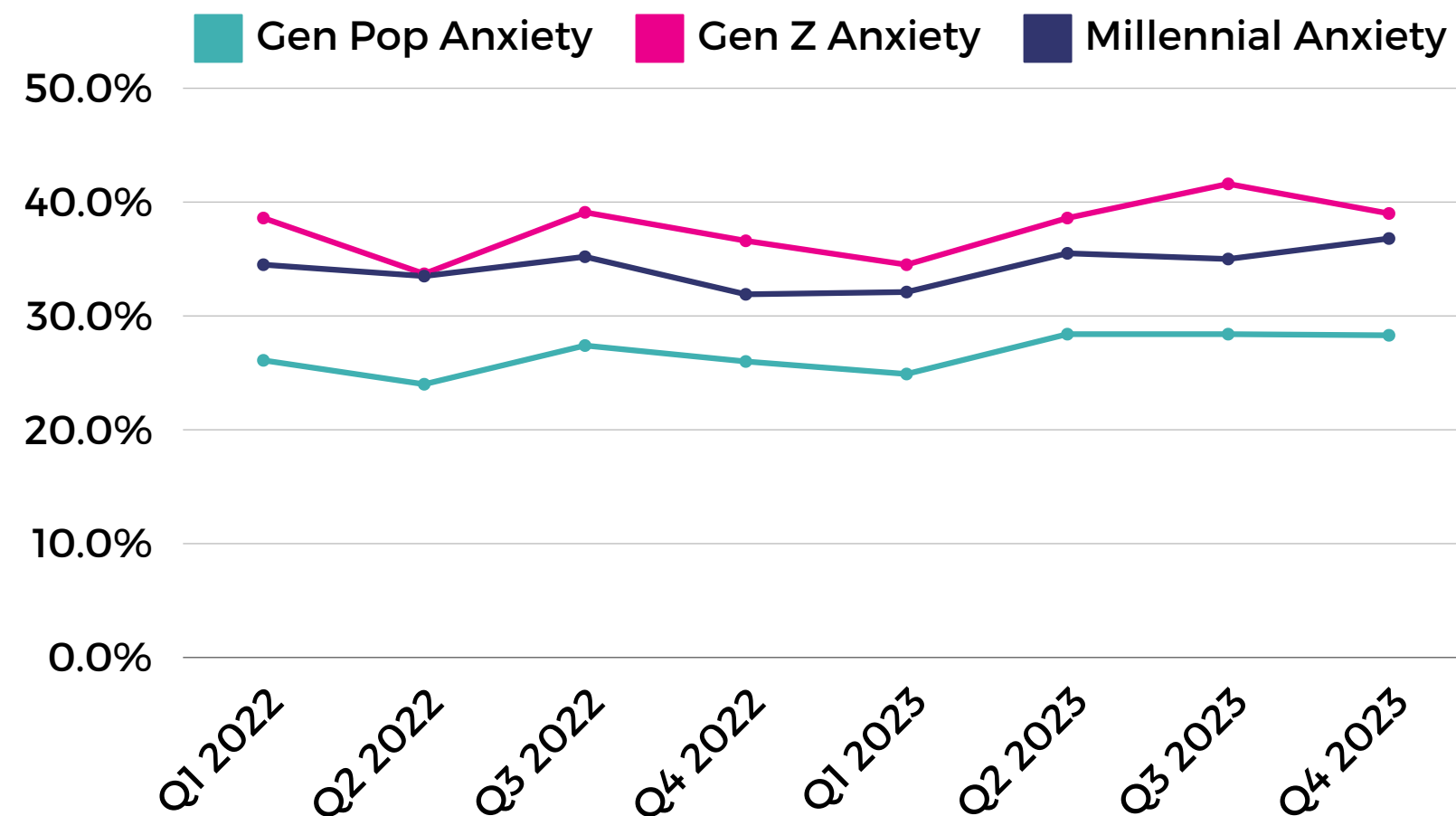


Kava Purchasers - P6M Use



Where will it go next? We think UP but slowly

BC people are stressed and looking for options. A steady 80% of Americans agree they are trying to reduce stress



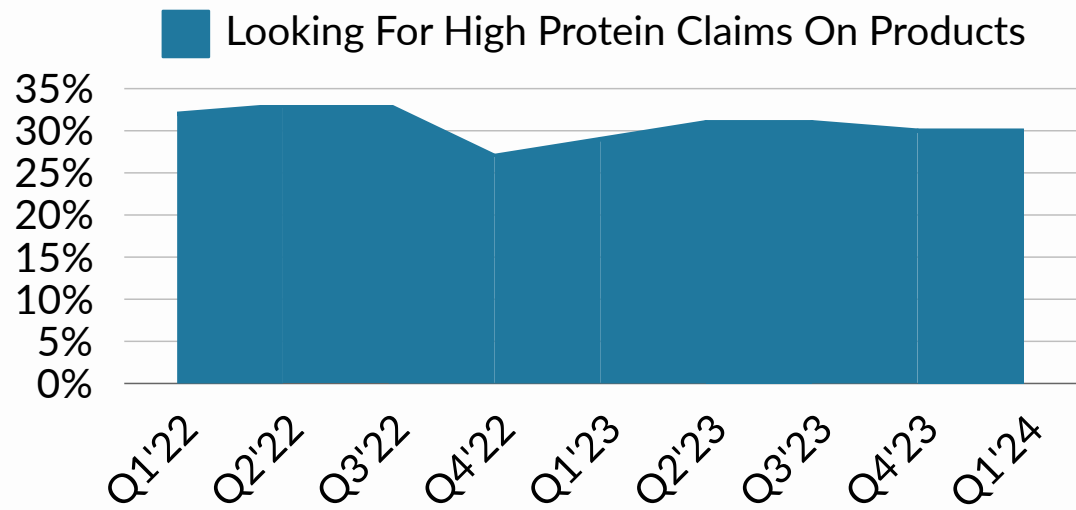
Hurdles to overcome

- Need to grow beyond trendy wellness population
- More accessible, mainstream brands
- Need to educate on best use (dose)
- Need to understand/explain the possible liver issues

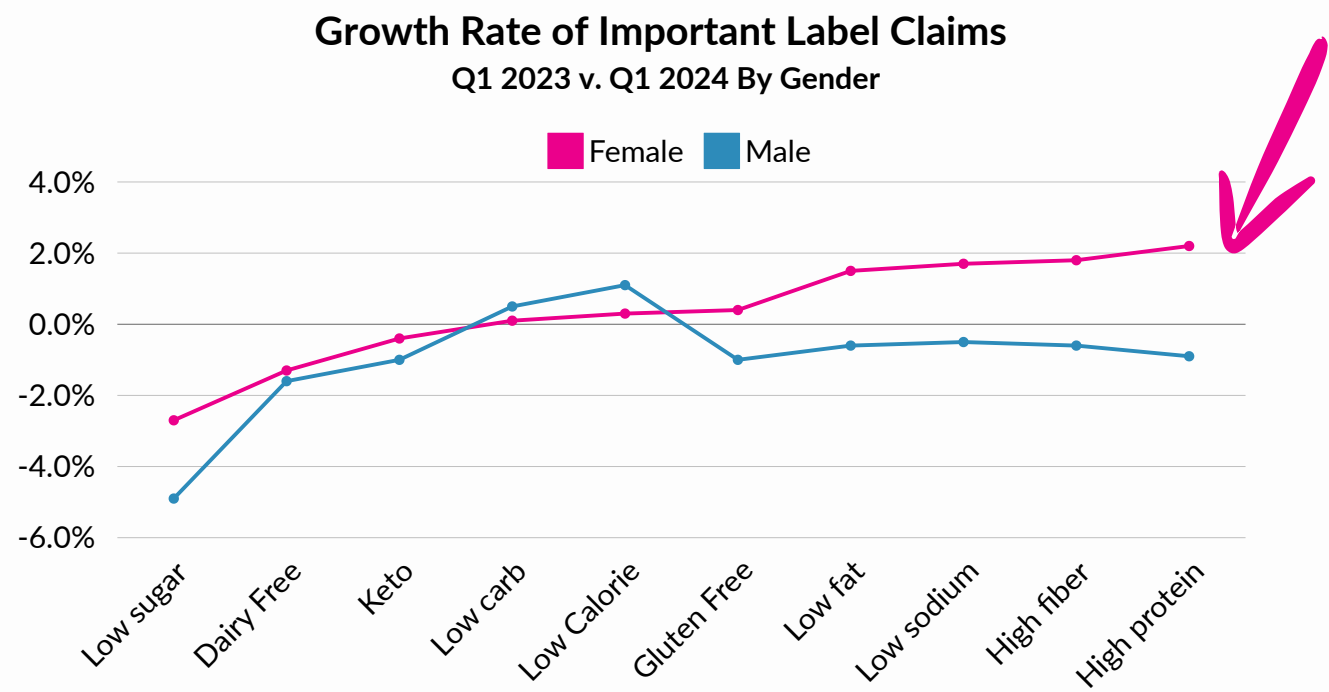


PROTEIN FOCUS MAINSTREAMING

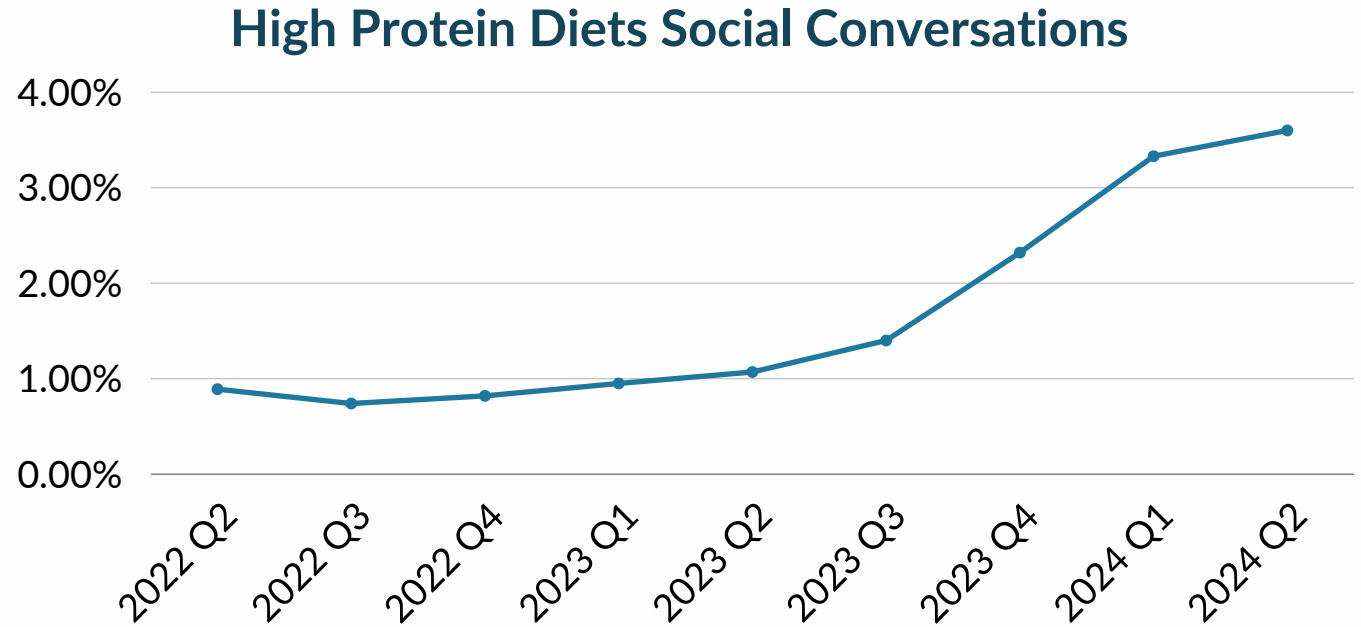
Steady Third of Consumers Focused on Protein - Growing among Women



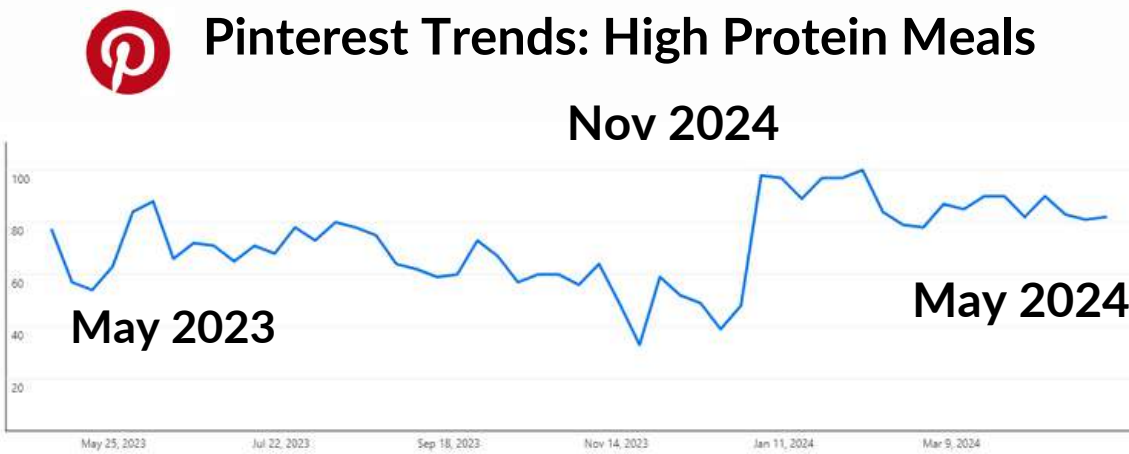
Source: Brightfield Group Quarterly Wellness Consumer Study



In late 2023, the 30g trend surged a focus on protein on social



Source: Brightfield Group Social Listening



Old School Favorites like Cottage Cheese were trendy last year - now mainstreaming

Better Homes & Gardens

Why Is TikTok So Obsessed With Cottage Cheese?

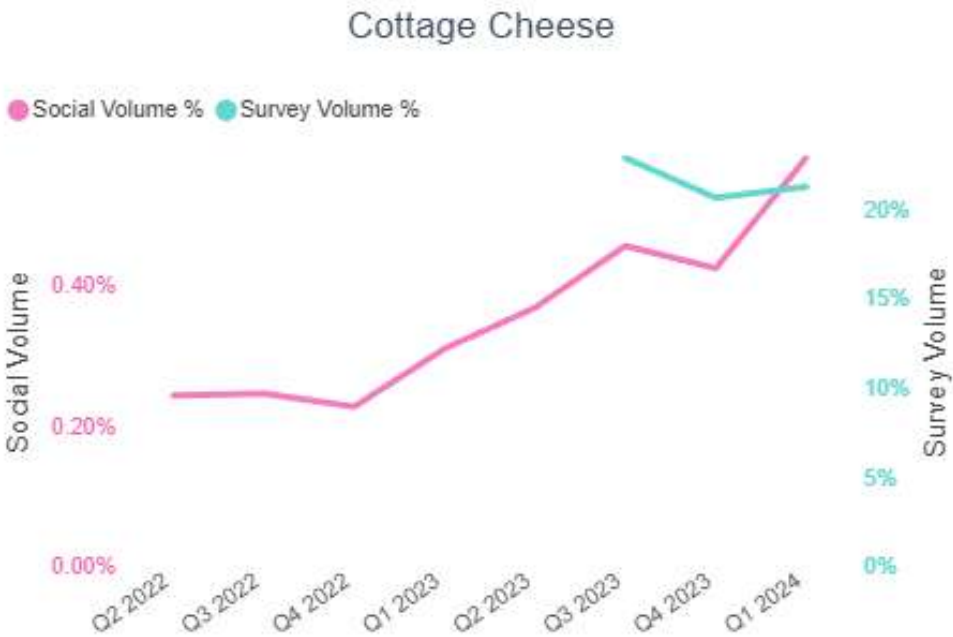
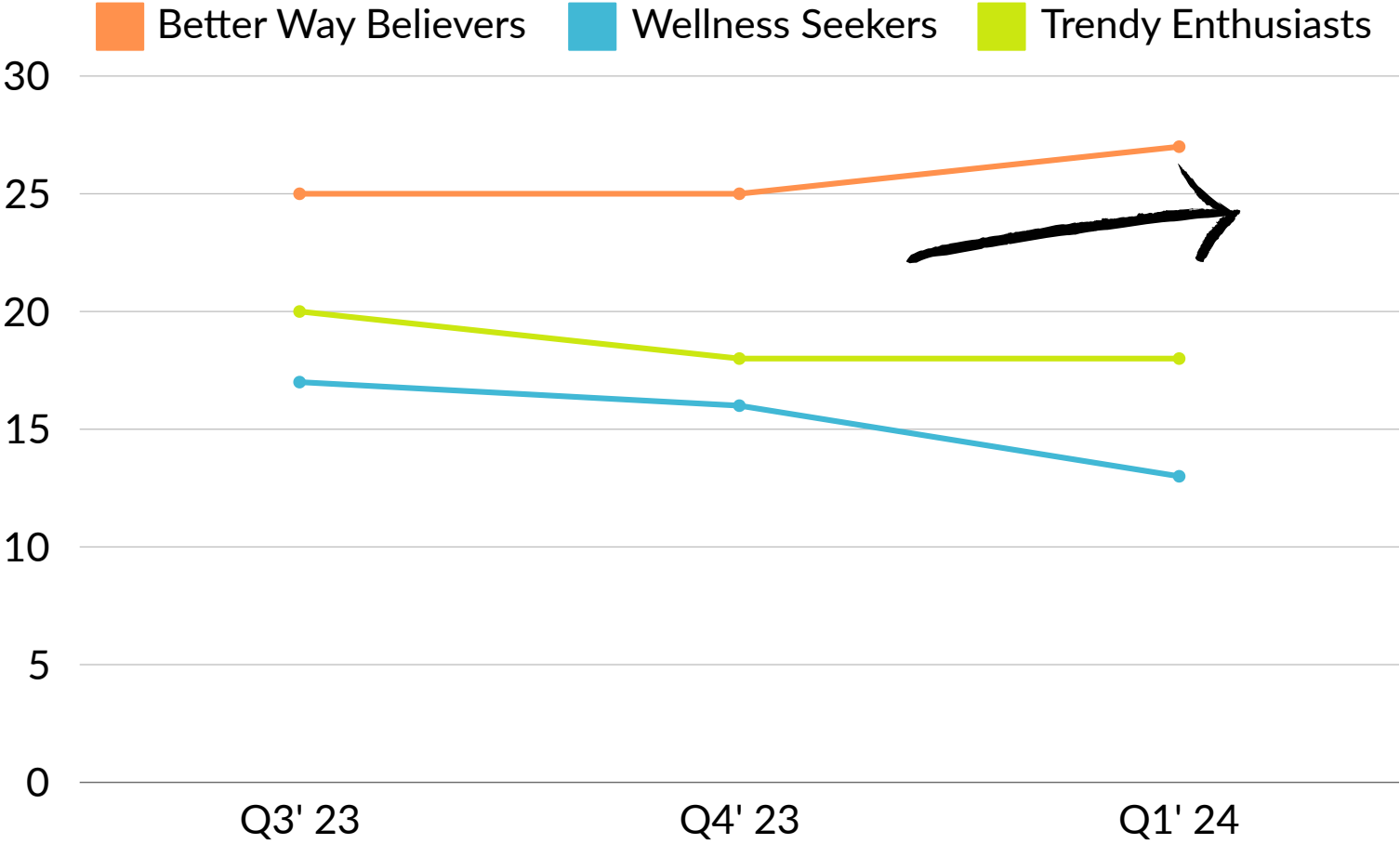
Food trends come and go, but recipes featuring this ingredient continue to be viral magic. Here's the latest.

By Sharon Greenthal | Published on July 10, 2023





Past 3 Month Purchasing: Cottage Cheese



Source: Brightfield Group SnapShots

Source: Brightfield Group Quarterly Wellness Survey

Similar boom in social media convos around eggs. Consumers are finding new and interesting ways to include eggs in their diet and use it as a substitute



Source: Brightfield Group Social Listening



YouTube
Cloud Bread Recipe (from instagram ...

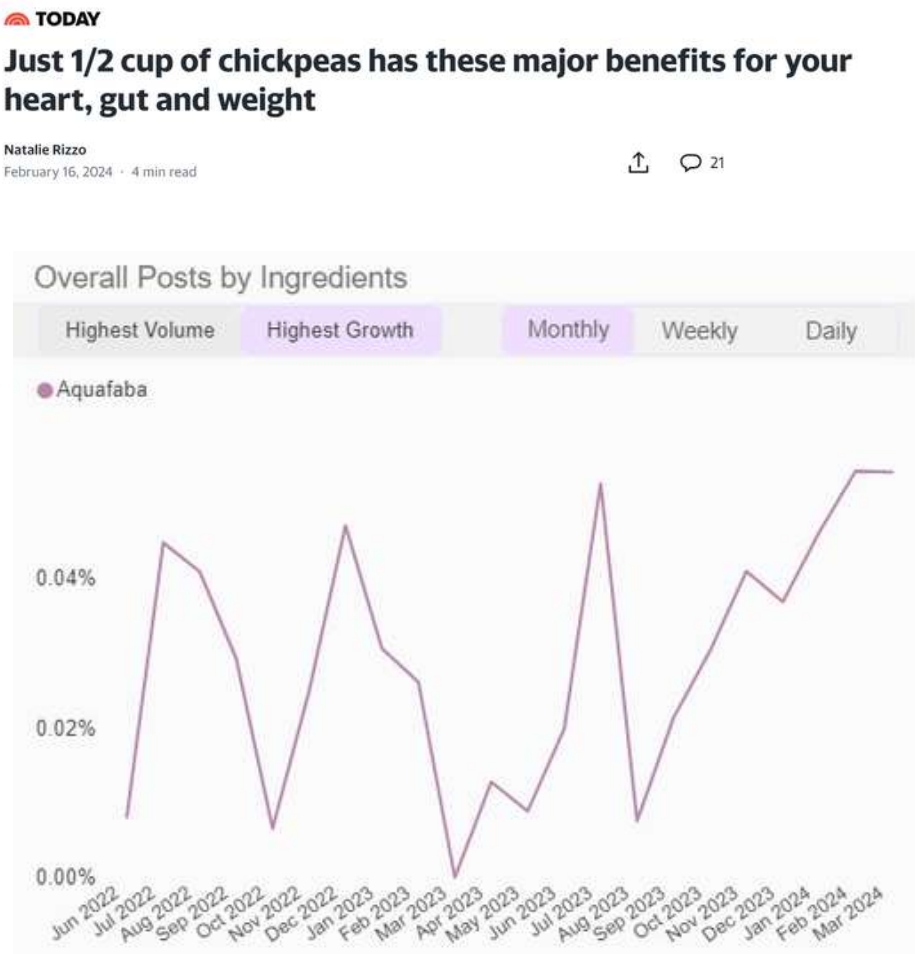
Ingredients Mentioned in Posts about Eggs in Past 6 Months

Ingredients	Share of Voice	Actual Growth	Growth Rate
Moringa	0.09%	0.36%	3,250.94%
Dha	0.16%	0.56%	1,982.88%
Tajin	0.44%	1.04%	1,482.69%
Aquafaba	0.23%	0.52%	1,028.86%
Jackfruit	0.17%	0.30%	985.54%
Lion's Mane	0.21%	0.78%	706.81%
Aloe Vera	0.17%	0.42%	594.86%
Lavender	1.08%	1.62%	423.40%
Poppy Seeds	1.83%	2.14%	376.95%
Licorice Root	0.00%	0.01%	352.56%
Raw Milk Cheese	0.09%	0.37%	294.83%
Cassava	0.37%	0.67%	293.78%

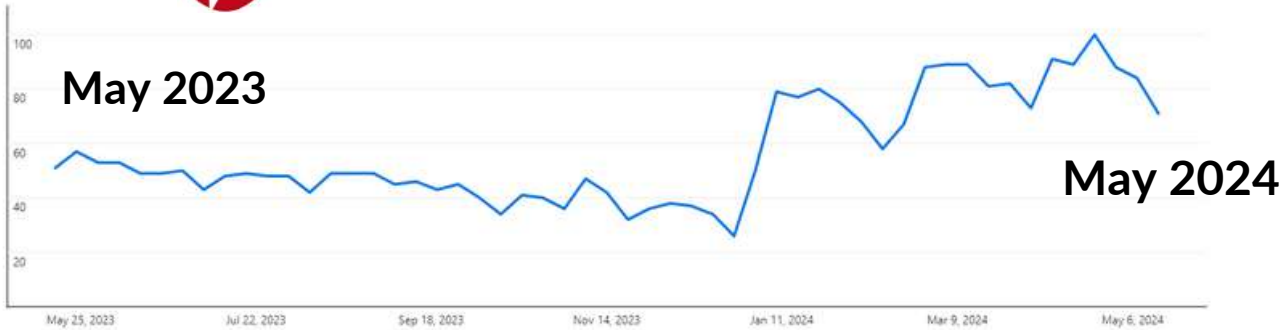
Source: Brightfield Group Social Listening

Protein Sources We are Watching

Chickpeas & Aquafaba



Pinterest Trends: Chickpeas



Source: Brightfield Group Social Listening

Insect Protein Cicadas Anyone?



The New York Times

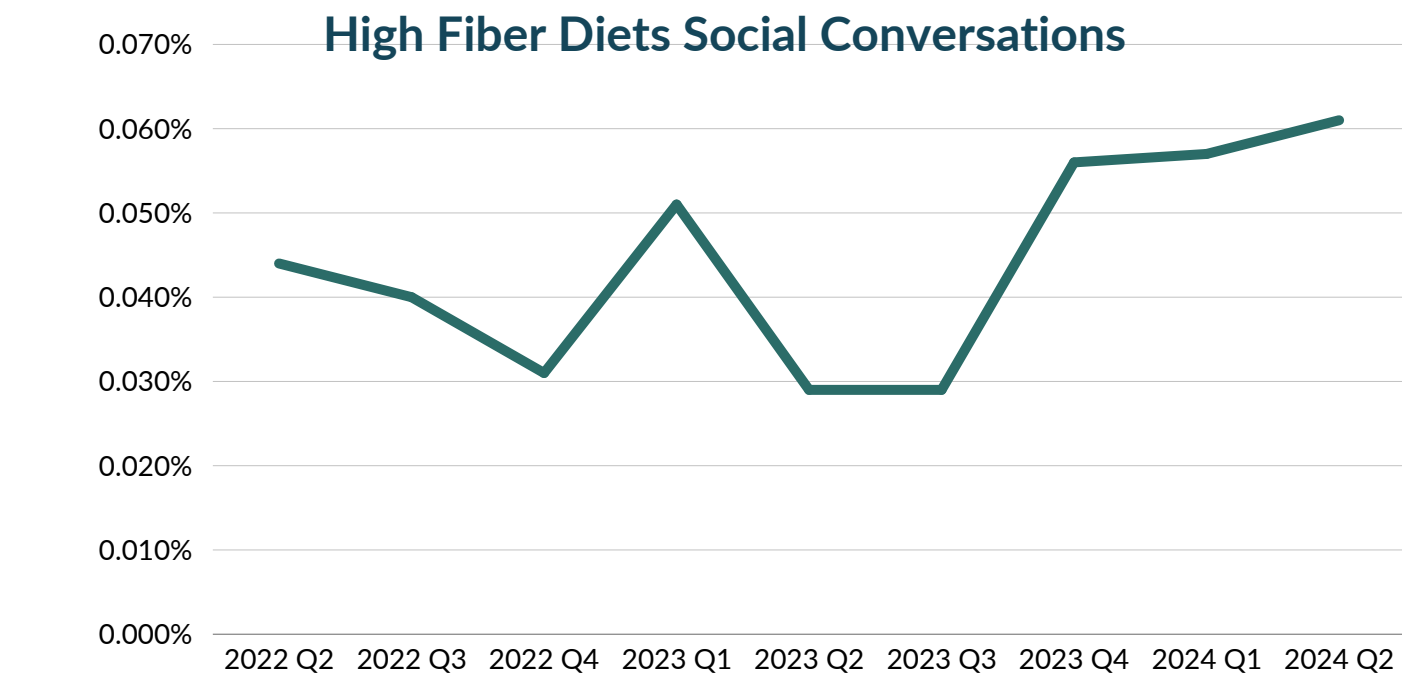
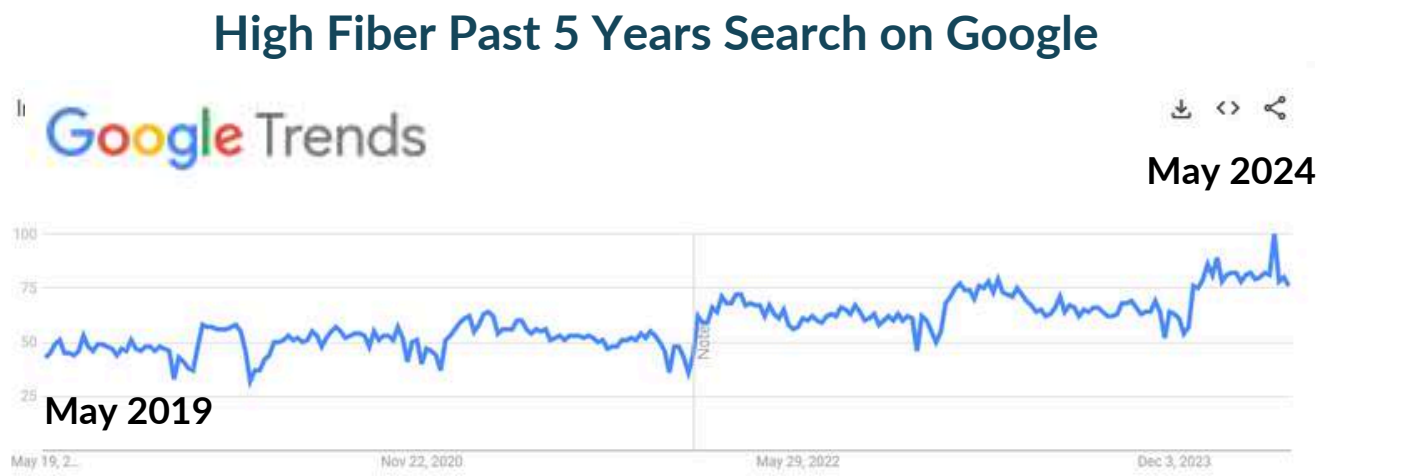
A Trillion Cicadas, They're What's for Dinner

For enthusiasts of edible bugs, this year's emergence presents an opportunity to cook up these noisy lobsters of the trees.

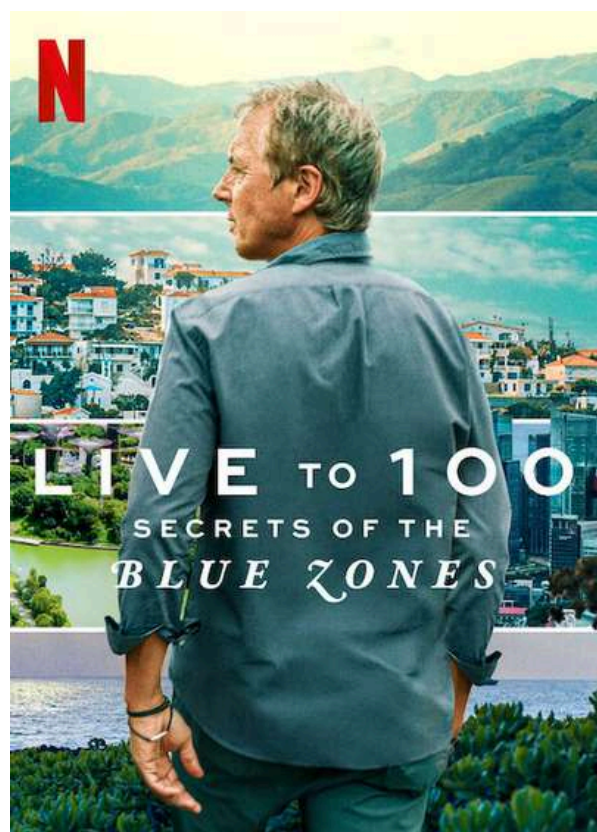


Source: Brightfield Group Social Listening

High Fiber Diets Seem to be Making a Comeback



Source: Brightfield Group Social Listening



LIVING BETTER

Less snacking, more satisfaction: Some foods boost levels of an Ozempic-like hormone

OCTOBER 30, 2023 · 5:01 AM ET

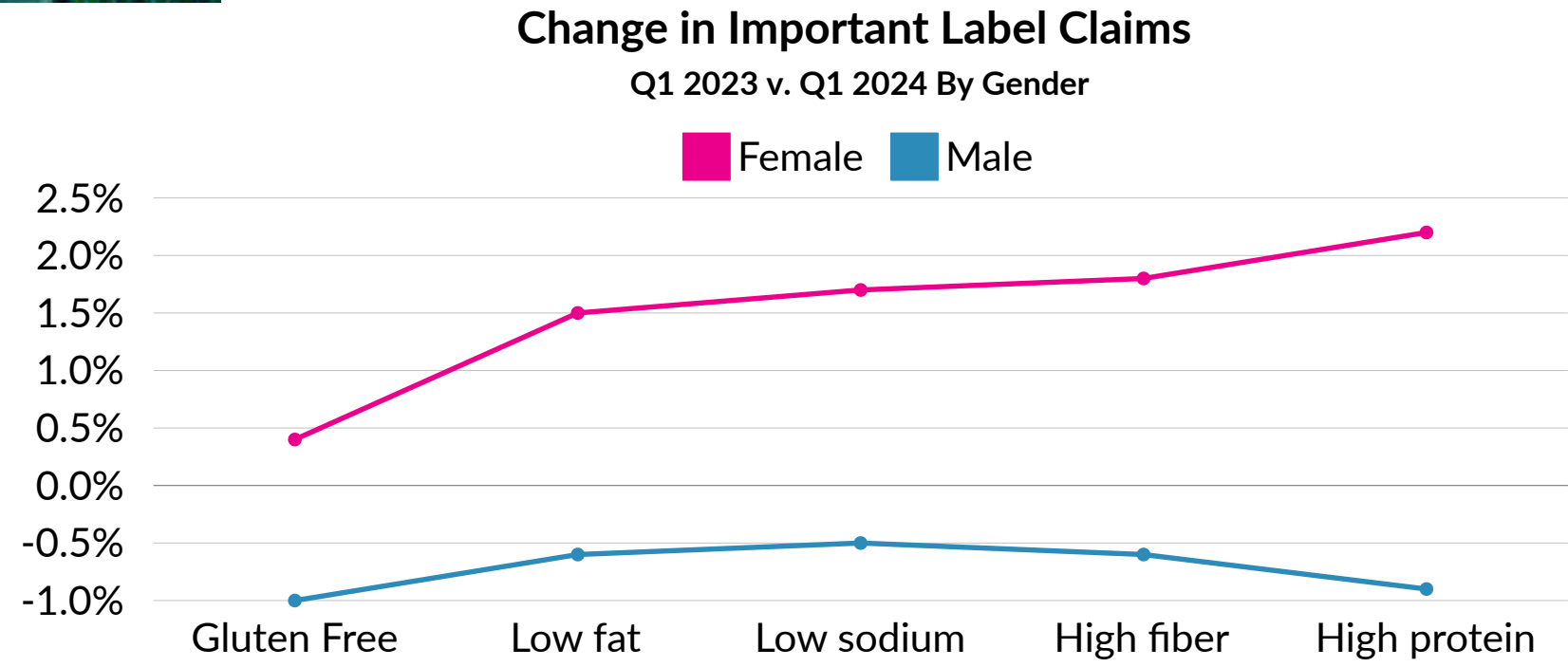
HEARD ON MORNING EDITION

Michaela Doucette

8 high-fiber foods popular in Blue Zones where people often live to 100

Gabby Landsverk Updated Aug 30, 2023, 8:11 AM CDT

Share Save

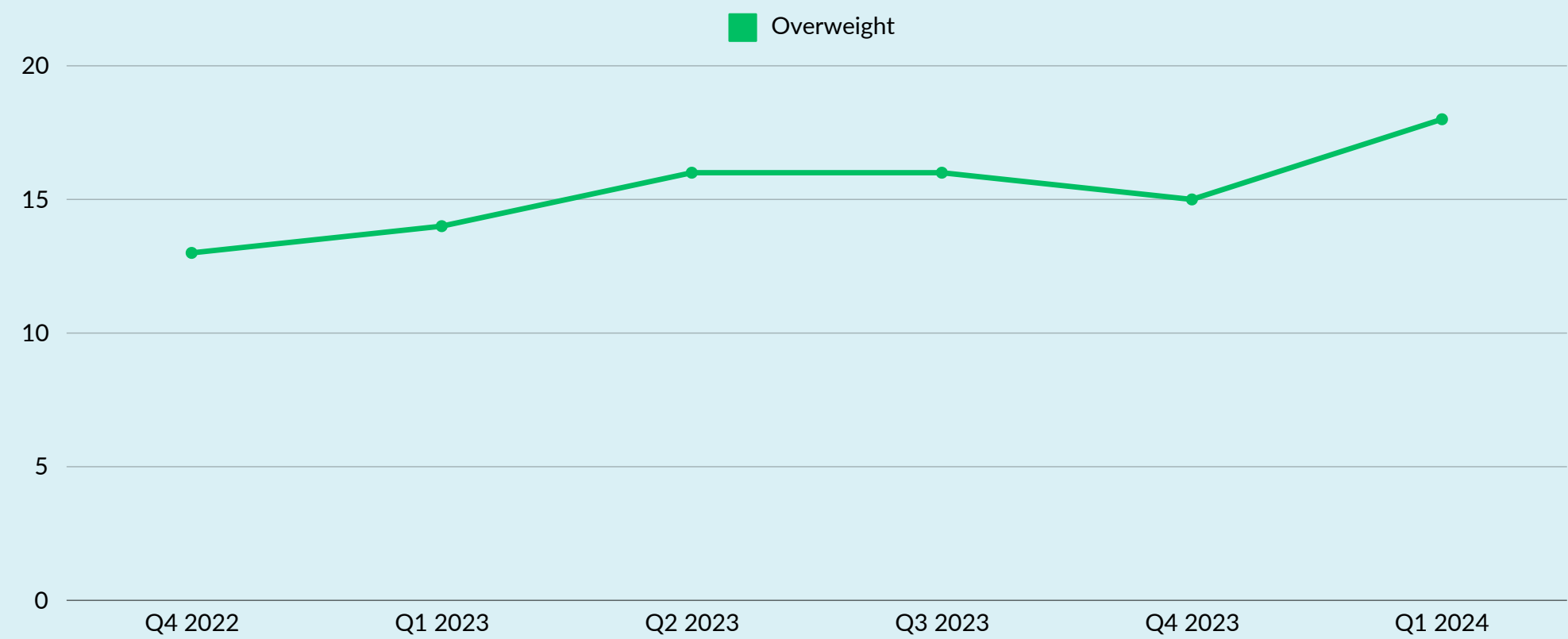


Source: Brightfield Group Quarterly Wellness Survey



GLUCOSE TRACKING CRAZE

In our study, a steady 13% of Americans Adults say they have diabetes
BUT more people are identifying as overweight



A more recent analysis of NHANES data from 2021 found that 40% of US adults aged 18 to 44 are insulin-resistant based on HOMA-IR measurements.

Fueled by desire to be in tune with your body and avoid peaks and crashes

THE WALL STREET JOURNAL.

Is Glucose the New Gluten? Inside the Blood-Sugar Health Craze

Proponents say that food ‘hacks’ meant to minimize blood-sugar spikes help them think more clearly, have more energy and reduce cravings. But some of the guidance is up for debate.



Introducing Stelo:
the first FDA-cleared glucose biosensor
available without a prescription

Empowering even more people* with type 2 diabetes not on insulin

Mar 19, 2024 - Health

Growing market for glucose monitoring fueled by nondiabetics

 Tina Reed, author of [Axios Vitals](#)

AXIOS



STAYING HEALTHY

Is blood sugar monitoring without diabetes worthwhile?

April 23, 2024

By **Robert H. Shmerling, MD**, Senior Faculty Editor, Harvard Health Publishing; Editorial Advisory Board Member, Harvard Health Publishing

THE WALL STREET JOURNAL.

FDA warns consumers over smartwatches to measure blood glucose levels

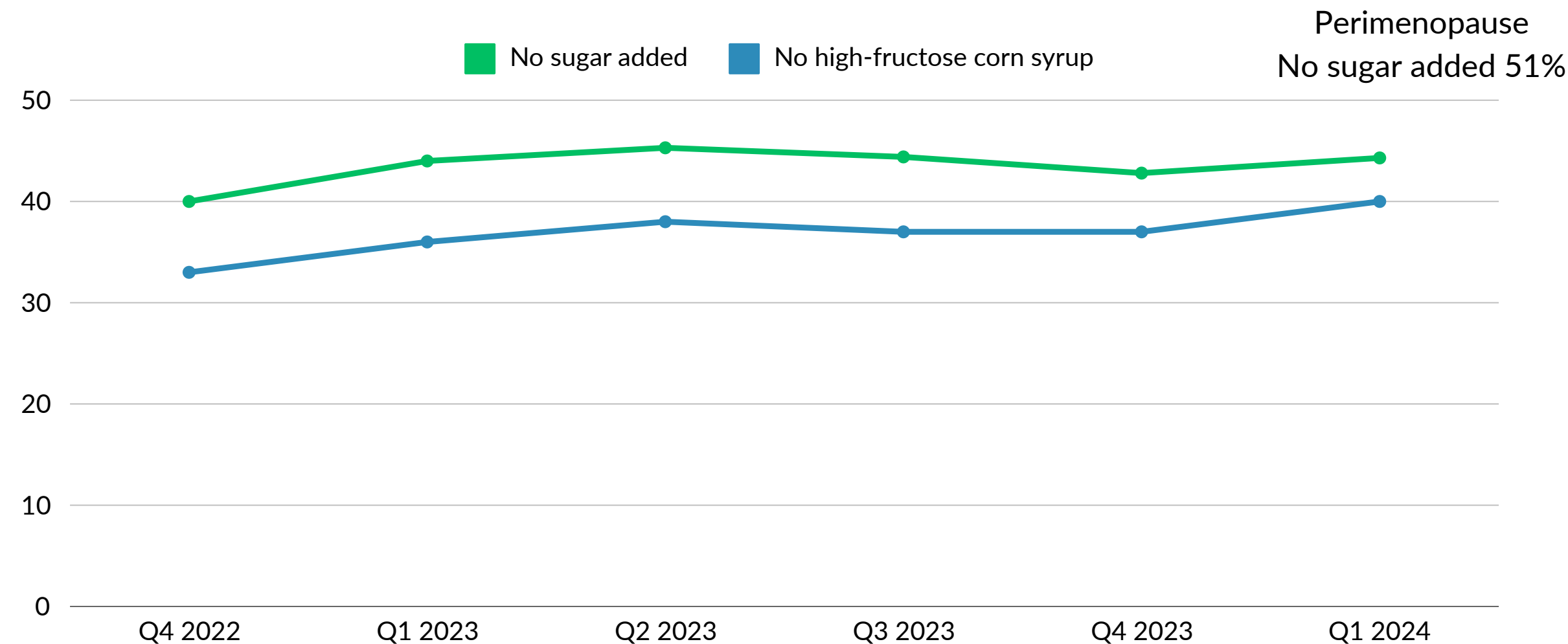
People with diabetes must regularly check their blood sugar levels

The Associated Press · Posted: Feb 22, 2024 10:10 AM CST | Last Updated: February 22

Americans are consistently seeking out lower sugar options

47% of women in perimenopause are looking for products that say low sugar compared to 39% of Gen Pop

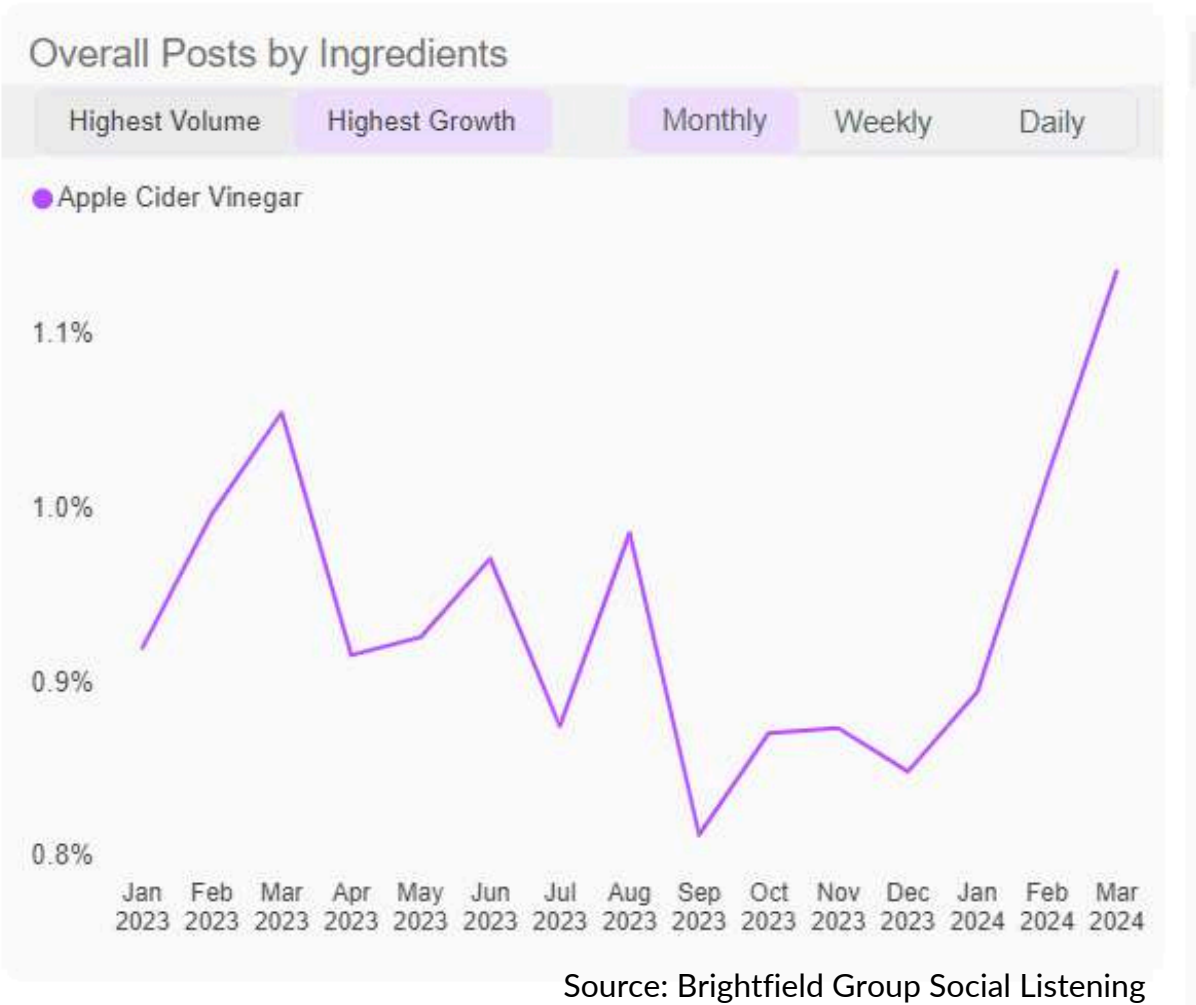
Ingredient Importance in Food and Bev



Source: Brightfield Group Quarterly Wellness Survey



Apple Cider Vinegar as an ingredient is rising, again



The New York Times

Is Apple Cider Vinegar Really a Cure-All?

It has been said to help with weight loss, blood sugar control, acne and more. But experts say the science is more nuanced.

NEWS MEDICAL LIFE SCIENCES

MEDICAL HOME LIFE SCIENCES HOME An AZoNetwork Site

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Apple cider vinegar shows promise in weight loss and metabolic health

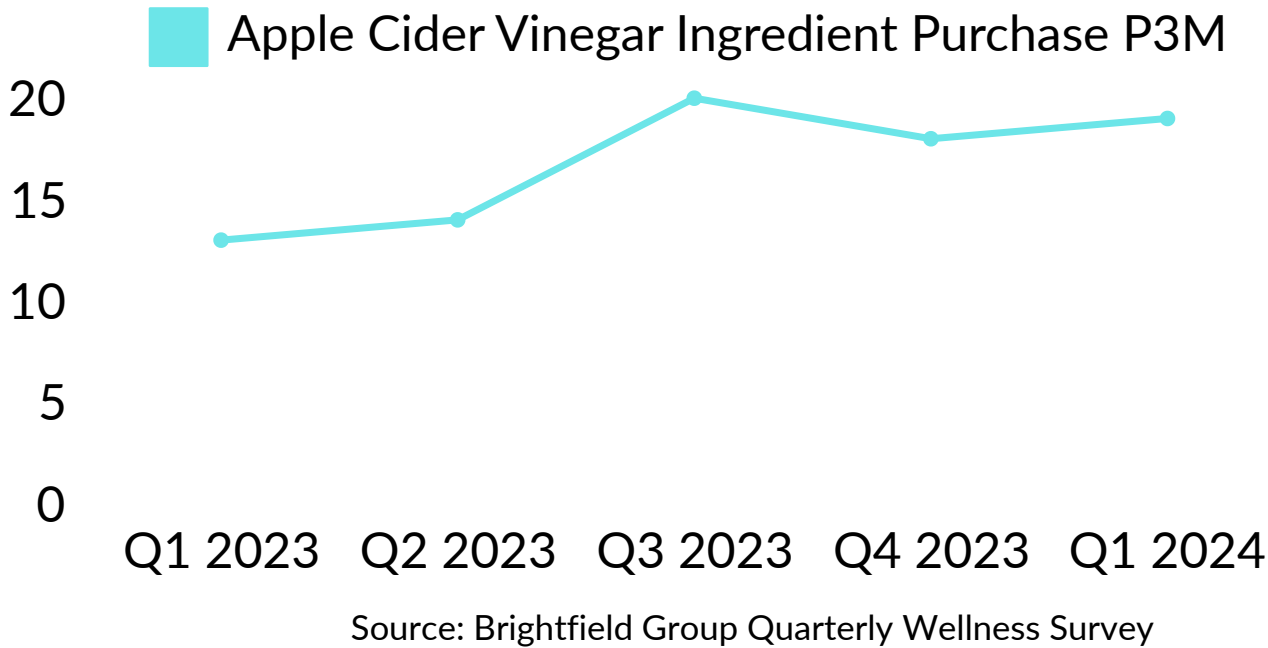
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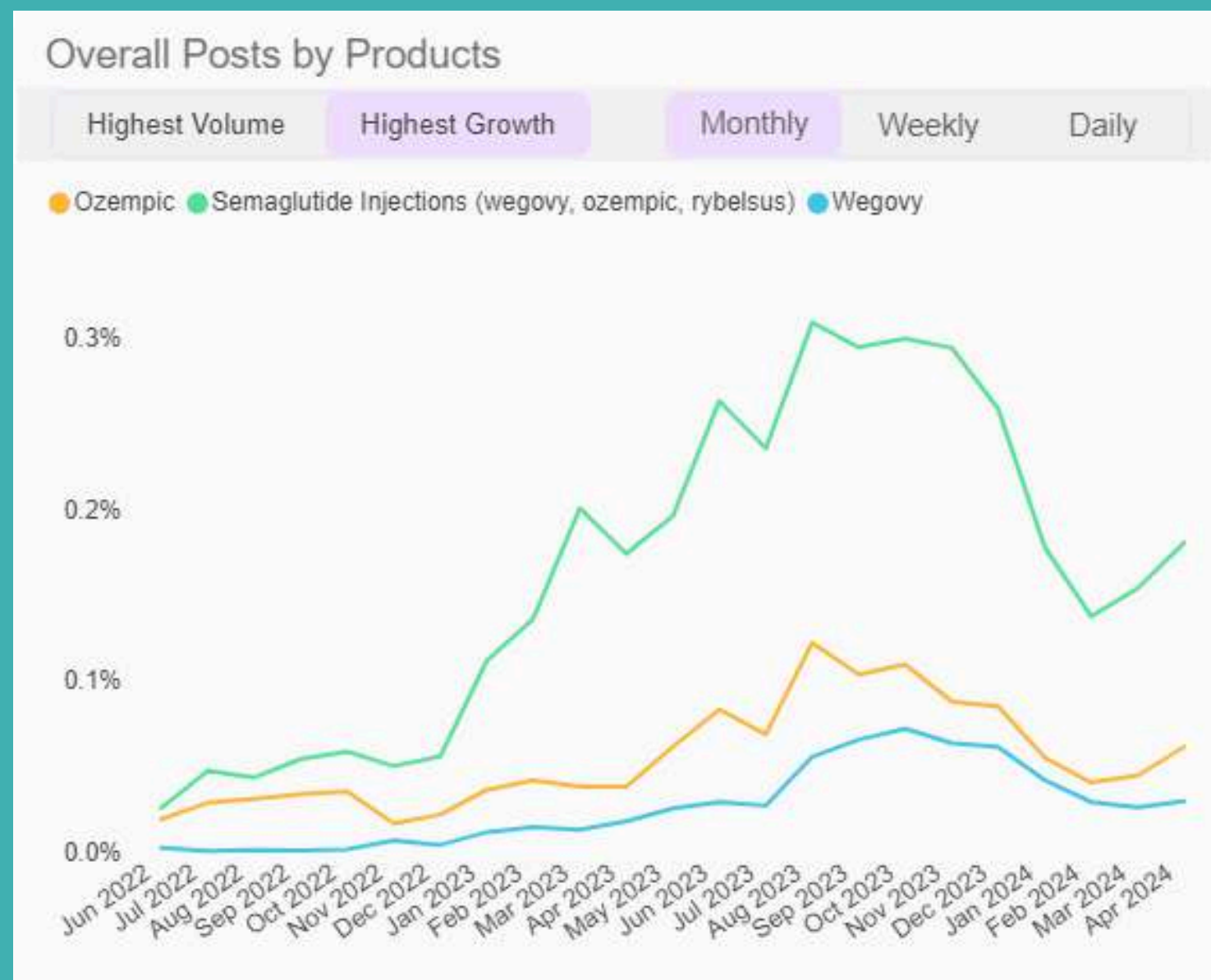
Download PDF Copy

By Pooja Toshniwal Paharia
Reviewed by Lily Ramsey, LLM

Mar 13 2024

In a recent study published in BMJ Nutrition, Prevention, and Health, researchers investigated the effects of apple cider vinegar (ACV) intake on weight, blood glucose, triglyceride, and cholesterol levels among Lebanese individuals.





TUNE IN NEXT TIME

REVISITING THE OZEMPIC CRAZE



[Click here to see our past trend reports!](#)

