



FUNCTIONAL MUSHROOMS MINI-REPORT

2025

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.

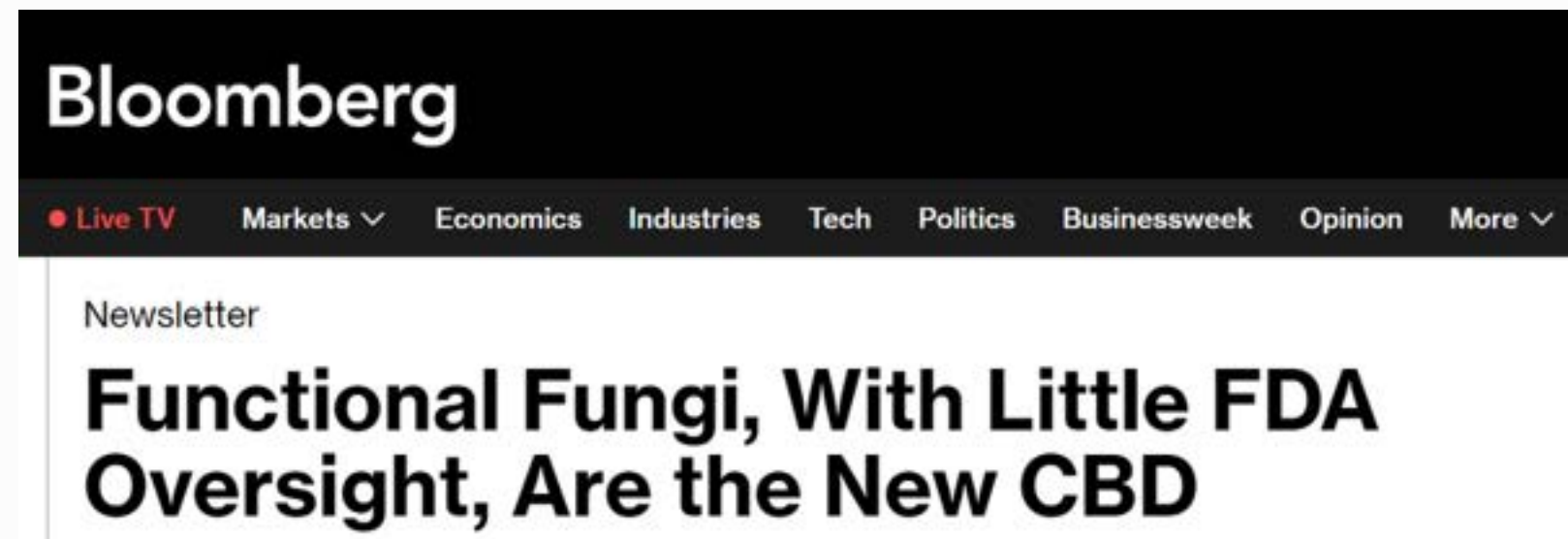
Trendy
Enthusiasts

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.



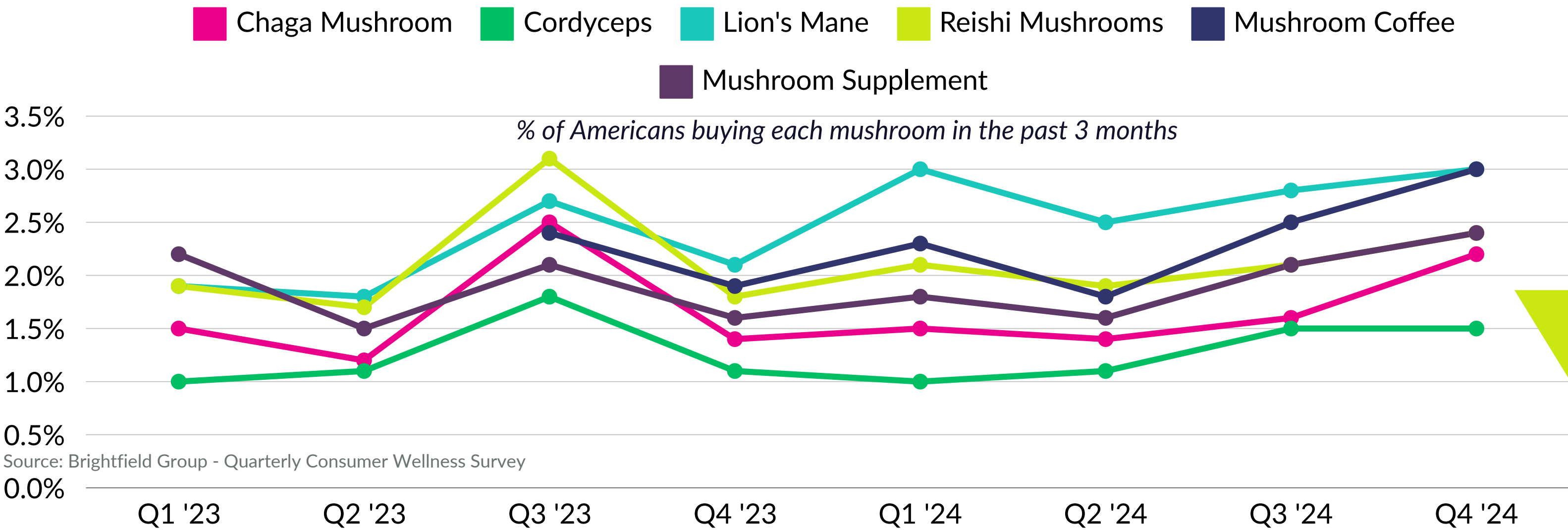
SHROOM BOOM

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



Functional Mushrooms Starting to Mainstream

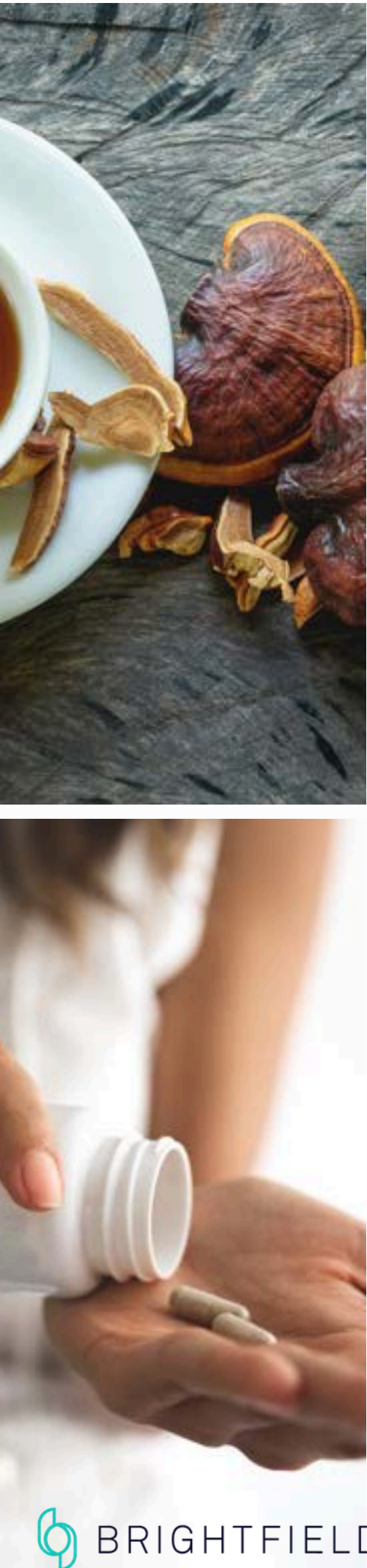
Purchasing Mushrooms as an Ingredient, as a Supplement or Mushroom Coffee



In 2024, largest segment became Better Way Believers, signaling mushrooms are becoming more “mainstream”

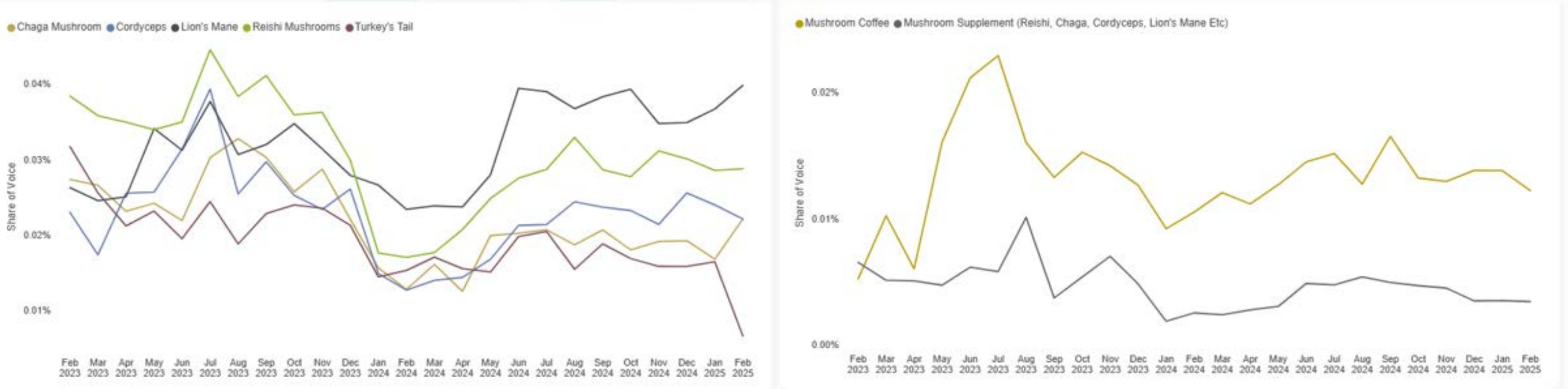
In early 2023, Majority segment (41%) were Wellness Seekers





Tracking the Shroom Boom in Social Media the last two years

Conversations about Functional Mushrooms skyrocketed in 2023 and have started to pick up again toward the end of 2024 into 2025.



Top Need States: Established Trends

Need State	Share of Voice
Holistic Wellness	43.39%
Brain/Mental Health	26.73%
Immunity	25.48%
Energy	22.18%
Functional Health	18.19%

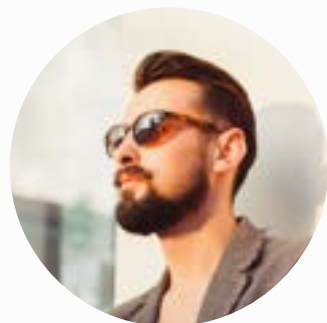
Analyzing Conversations about Functional Mushrooms + Need States

Established Trends show how Functional Mushrooms are already being discussed with Holistic Wellness, Brain/Mental Health and Immunity topping the conversations. Growing Need States shed light on where Brands may want to innovate or position moving forward. Areas like Relaxation, Energy, Focus and Women's Health may help functional mushrooms brands stay relevant and meet consumers' unmet needs.

Growing Need States: Innovation Opportunities to Watch

Need State	Actual Growth	Growth Rate
Relaxation	6.53%	88.57%
Energy	12.99%	69.64%
Focus	2.42%	55.57%
Women's Health	1.01%	53.37%
Digestive Health	4.39%	47.36%

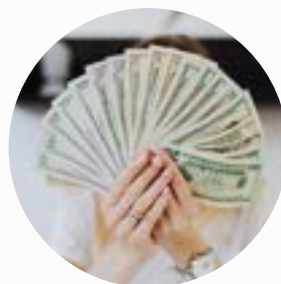
Who are Functional Mushroom Purchasers?



53%
male



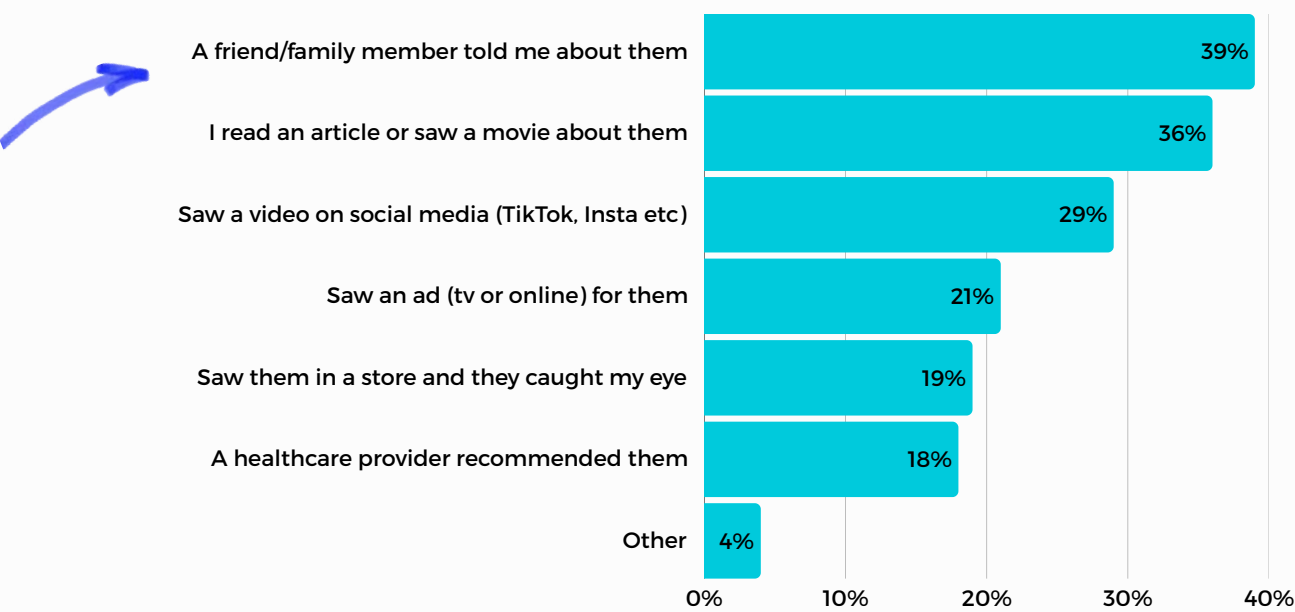
42% are
Millennials



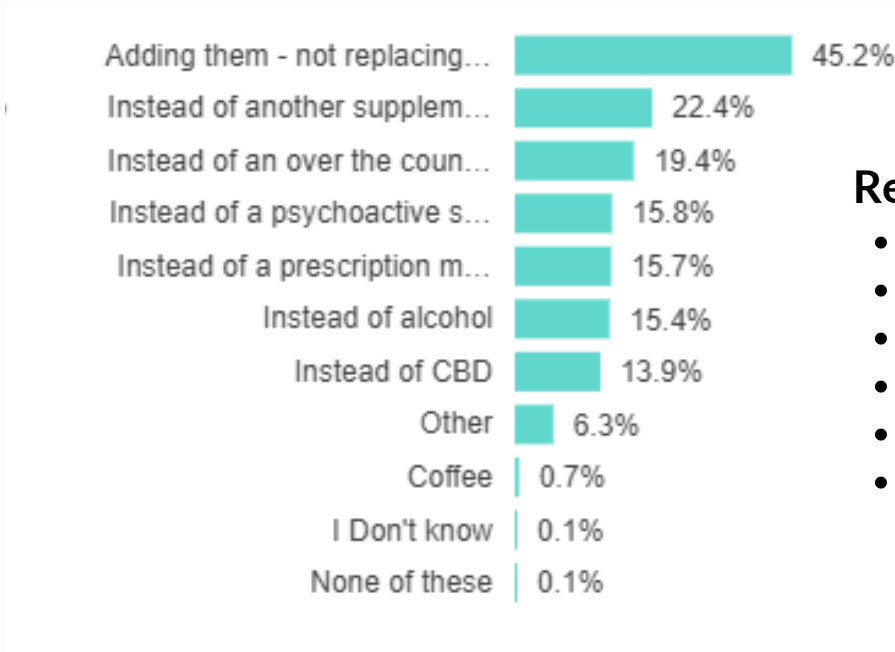
Skewing upper and middle
income:
39% are upper income and 36%
middle, 24% lower income

Word of Mouth and Viral Buzz are Triggering Use

Friends and Media Trigger Trial



New Use Not Replacement

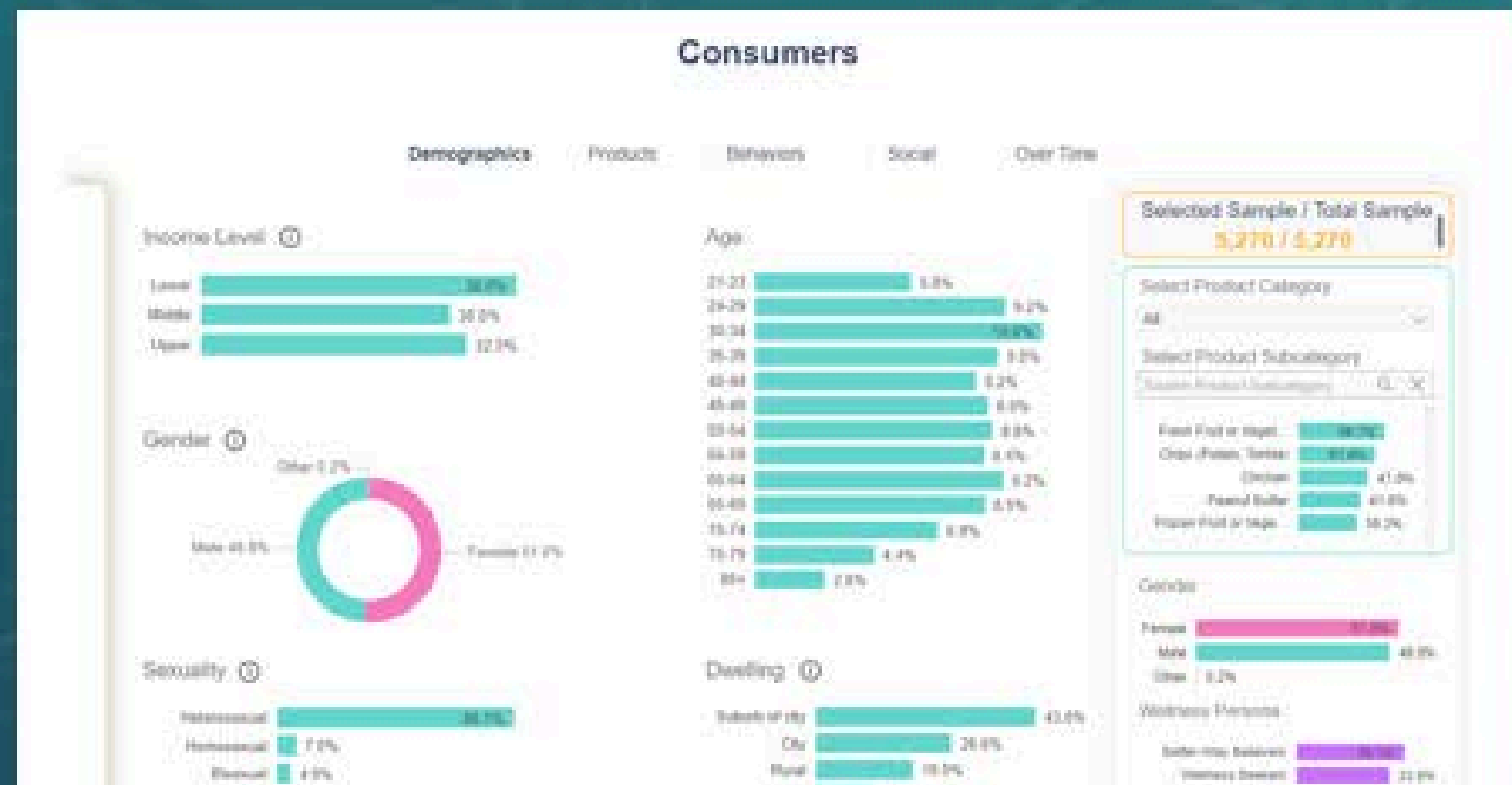


- Replacing**
- Other supplements
 - OTC Meds
 - Psychoactive Substances
 - Prescriptions
 - Alcohol
 - CBD

Get into the data in the Brightfield Portal!

Explore Consumer Insights 

Explore Social Listening 





Click here to see our past trend reports!

Want to see the insights in action?
Book a demo!

