



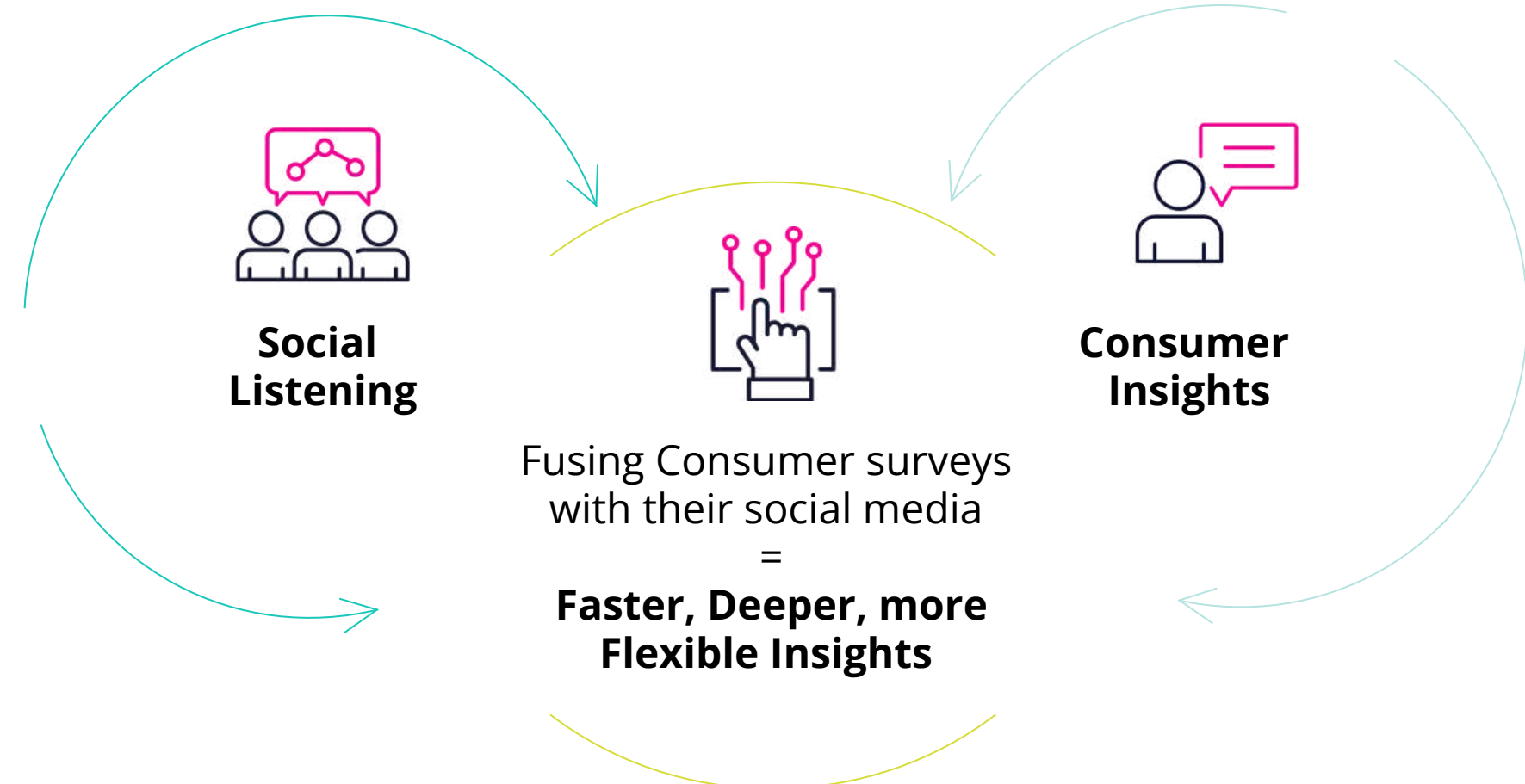
SAVOR THE FUTURE: 2025 WELLNESS TRENDS



Surveys + Social: The Brightfield Difference

Brightfield Group's AI-Driven consumer insights empowers marketers and product developers to innovate & brand with confidence.

Ignite Your Innovation Journey with AI-Driven Consumer Insights



Wellness CPG Study: Consumer Insights + Social Listening Dashboard

AI-Driven Consumer Insights Dashboard



Comprehensive Consumer Insights

- Quarterly Survey of 5,000+ US Adult Consumers
- Census-Balanced & Unique consumers each quarter to allow combining of quarters for higher sample size
- Survey includes robust Behavioral, Attitudinal, Lifestyle insights & product usage for over 150 categories
- Segmentation developed to explore by consumer attitudes and priorities

Social Listening Dashboard



Forward-Looking Social Listening

- Total conversations spanning 20 million+ mentions of keywords associated with wellness from Twitter(X), Instagram, TikTok – updated weekly
- Pre-trained Dimensions capture conversations about Conditions, Need States, Products, Sub-Products, Flavors and Ingredients
- Verbatim mentions link to actual post to explore context & posters
- AI-Trained Persona Predictions allow filtering by Gender, Age, Persona

What's inside...



BEVNET Live Recap





SHIFT IN SHARE OF BUZZ

Americans are most stressed we have seen and often turn to substances/products to relax



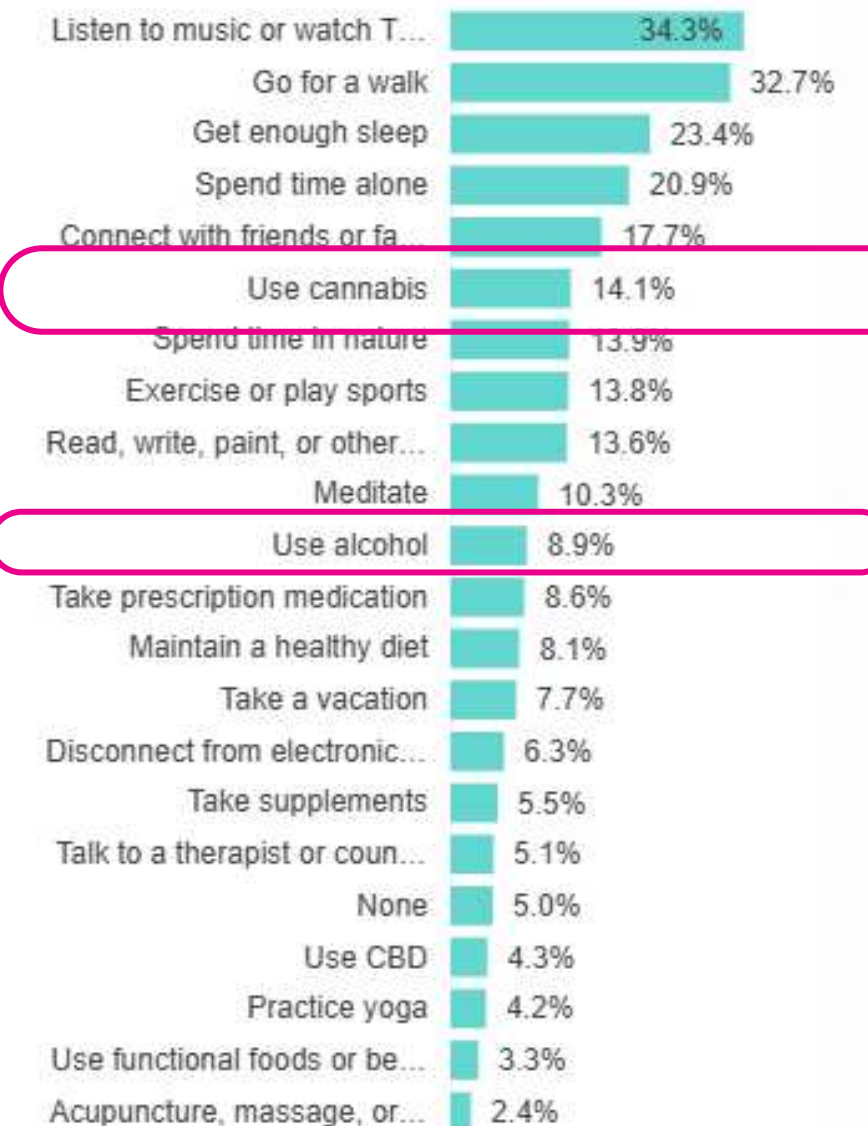
Relaxation Need State is the highest it's been since we started tracking it in Q3 2021. It now stands at 54% compared to 47% in Q1 2024

Need States



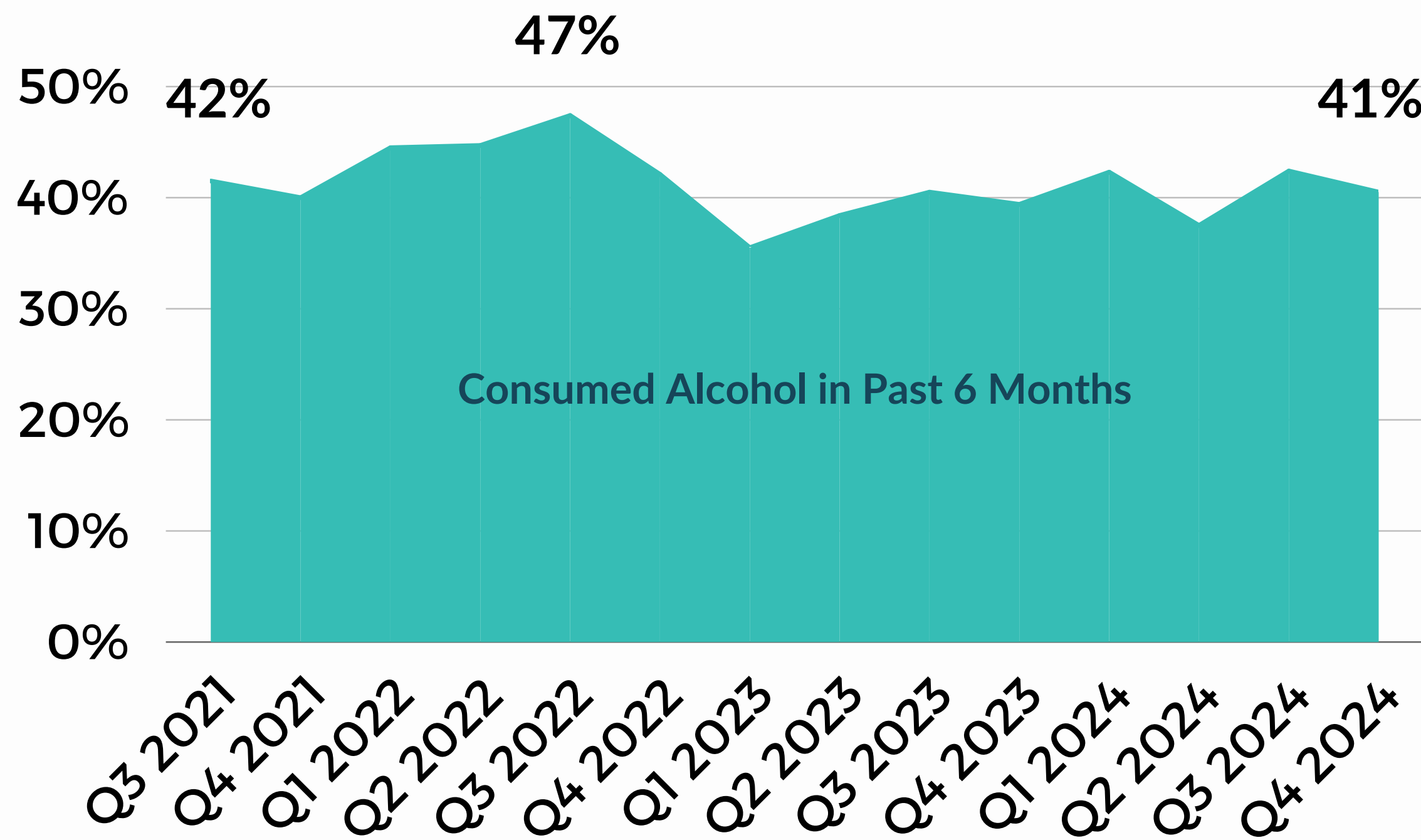
74% of Americans agree reducing stress is a priority for me

Stress Relief Tactics



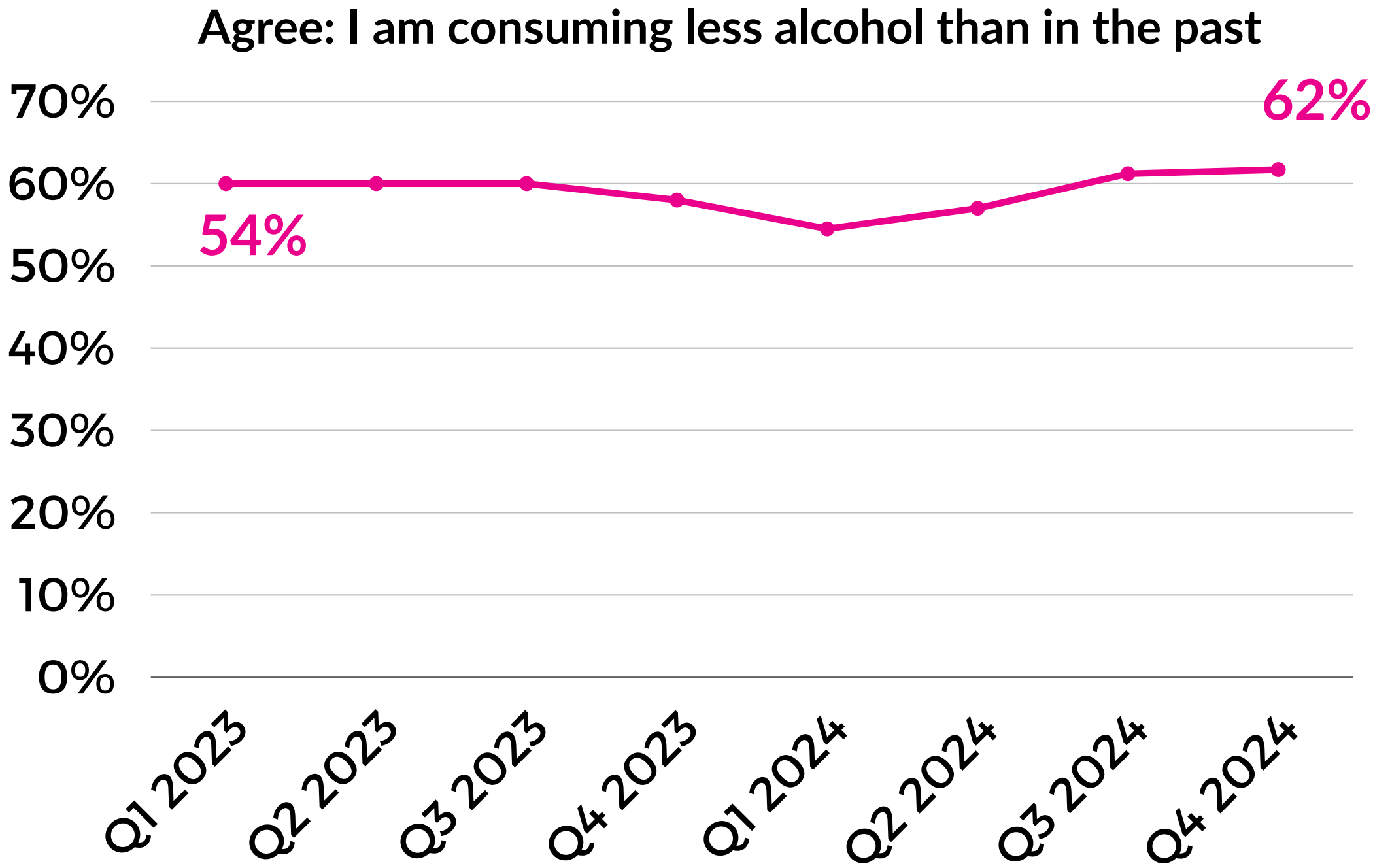


American alcohol consumption has been depressed since late 2022



Source: Brightfield Group; Wellness Consumer Insights; Q4 2024

Over 60% of alcohol consumers reported wanting to drink less, only increasing over the course of 2024



45% say it's to be healthier

36% say its to save money

25% say it's for mental health

💡 Love the data behind the report?
Subscribe to monthly access to the
Wellness CPG platform and get 50%
off with code: [Bevnet50](#)
[Learn more.](#)





Who are the alcohol reducers?

- Above-average income
- More likely to live in a city
- Skew male
- Most commonly Gen X or Millennial



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FROM THE PORTAL

Alcohol Reducers

Income Level ⓘ



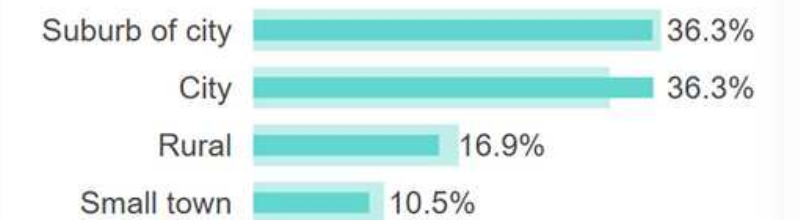
Generation ⓘ



Gender



Dwelling ⓘ



How are you consuming less alcohol?

■ Male ■ Female

How: Limiting Days I Drink

How: Not Drinking

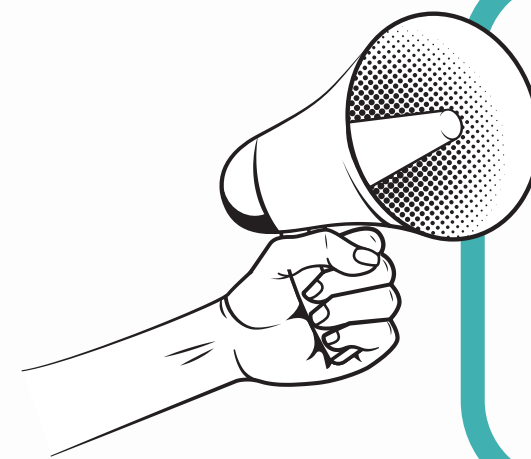




Dry January

16% HAVE DONE IT IN THE PAST

**37% WERE A YES OR MAYBE
FOR 2025**



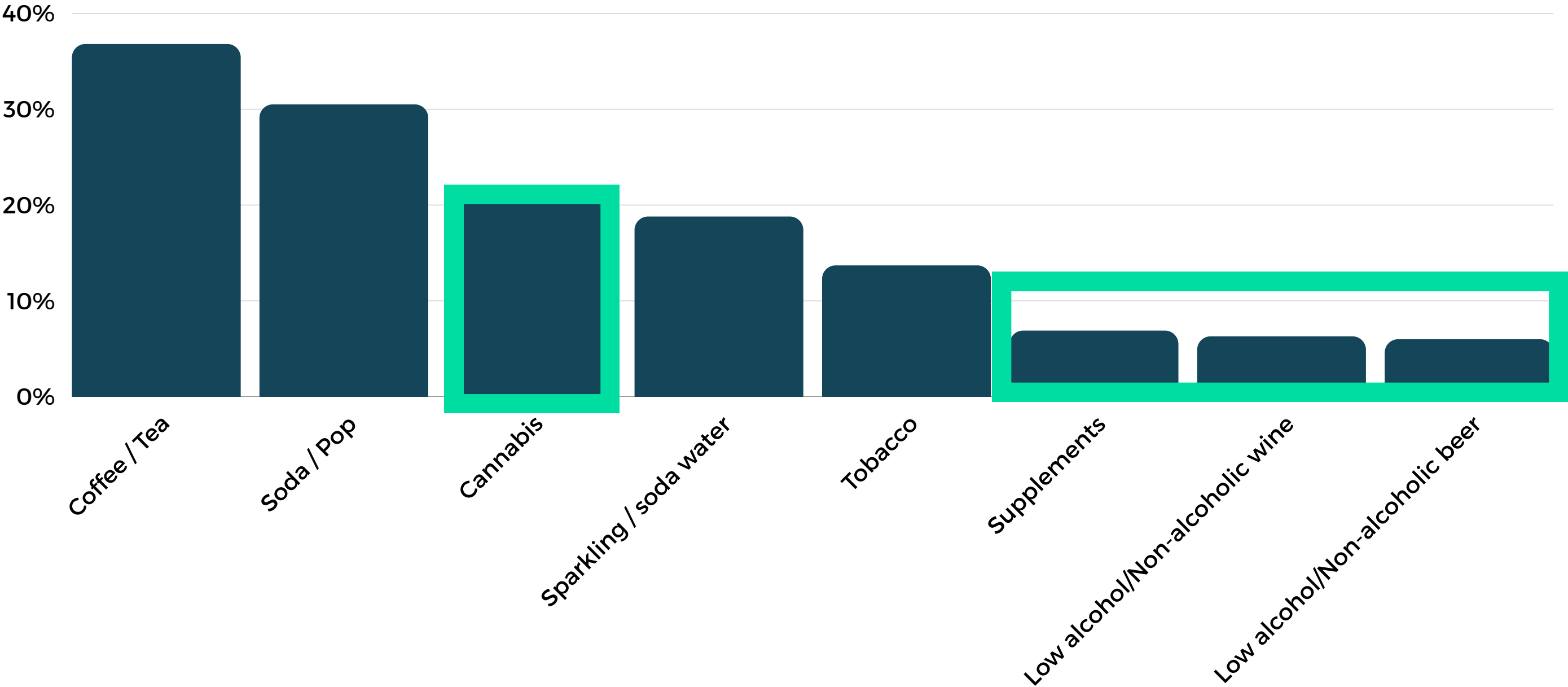
The New York Times

*Surgeon General Calls for Cancer
Warnings on Alcohol*



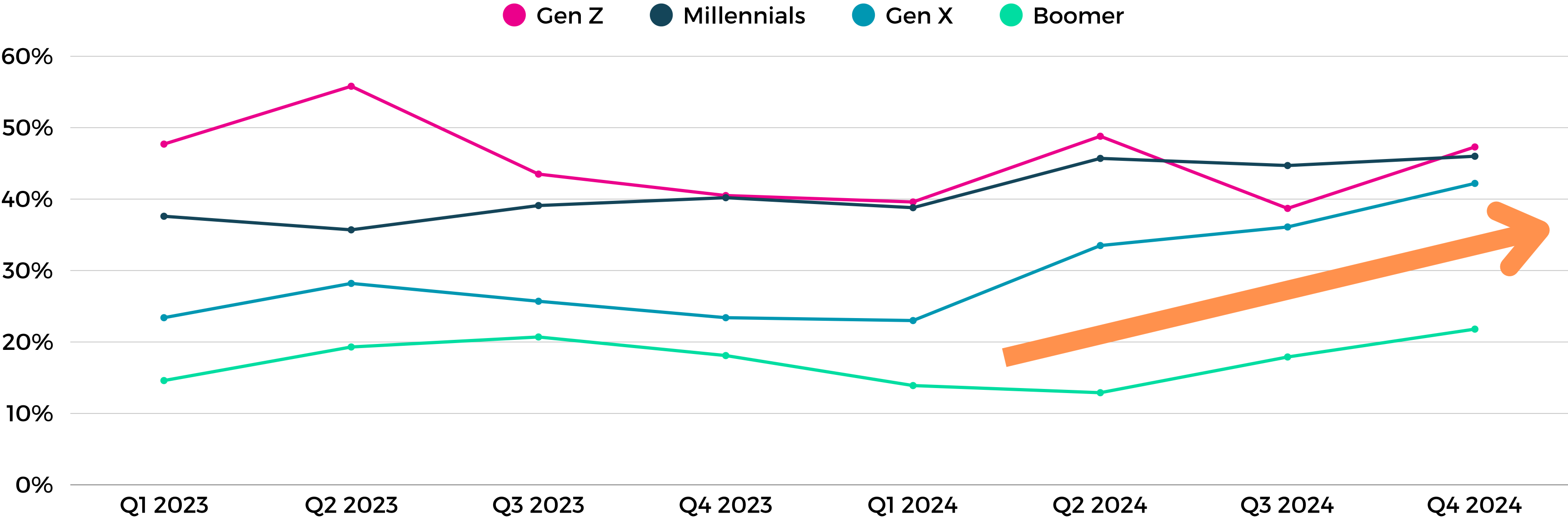
Common alcohol alternatives include coffee, soda, and cannabis

Alcohol Substitutes



Source: Brightfield Group; Wellness Consumer Insights; Q4 2024

Cannabis Use on the rise among Alcohol Consumers





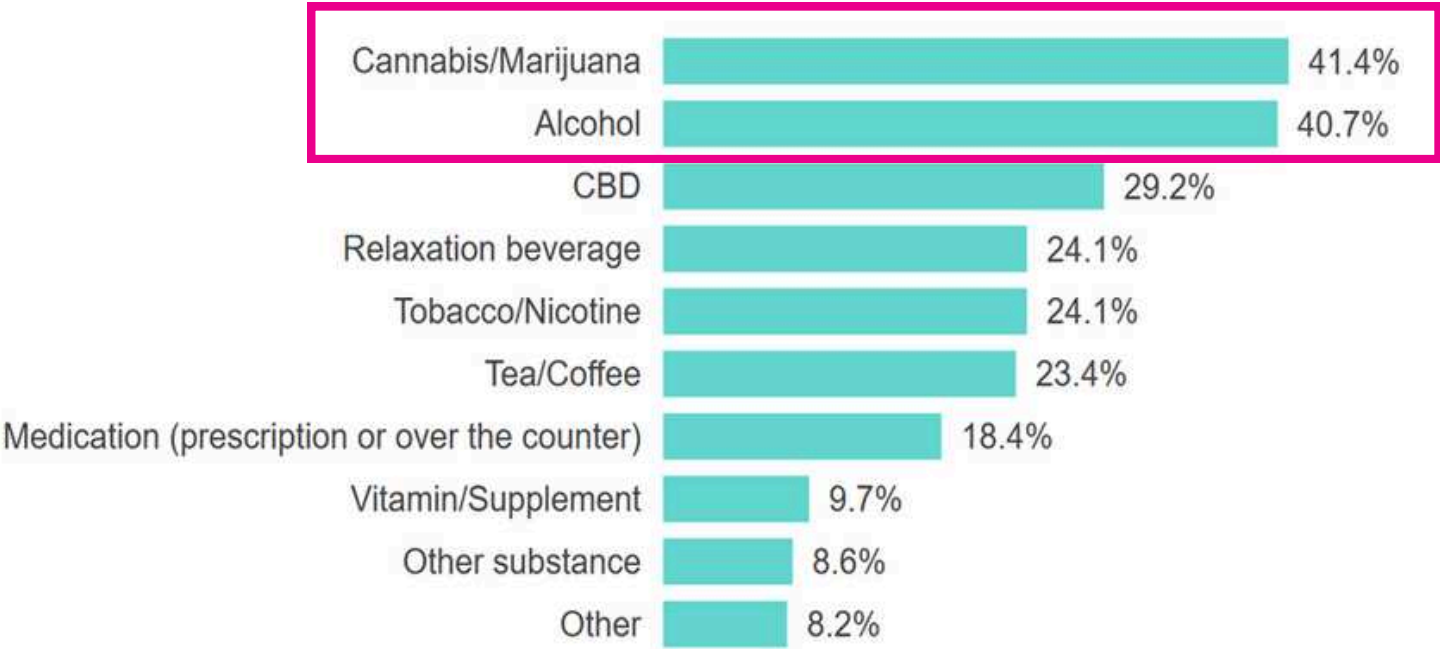
HD THC Beverages are being used as a replacement for alcohol

Incidence of Use of Hemp-Derived
THC Products (all formats)

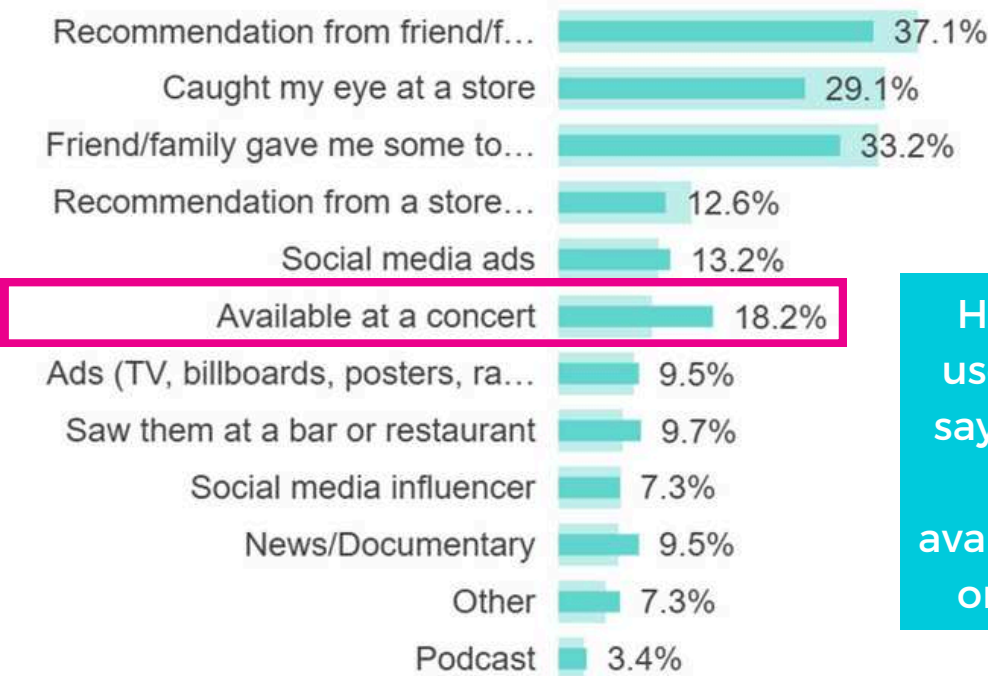
Q1 2024	Q2 2024	Q3 2024	Q4 2024
8%	10%	12%	14%

11% of hemp-derived
users have used a drink in
the past 6 months

What did you replace with Hemp-Derived THC Beverages?



Hemp-Derived THC Use Triggers Among Drink Users



Hemp THC Drinks
users more likely to
say they tried Hemp
THC b/c it was
available at a concert,
or, bar/restaurant.

Source: Brightfield Group; Wellness Consumer Insights; Q4 2024
Hemp Derived THC Consumer Insights Q3 2024



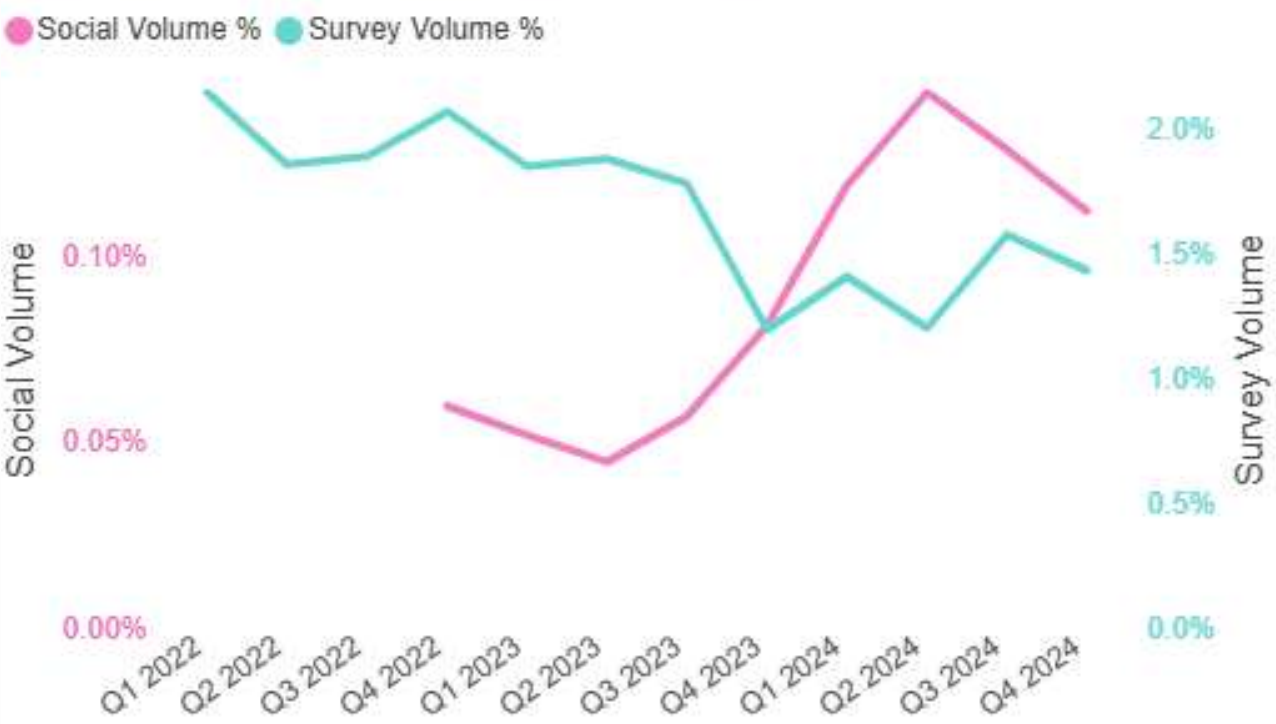
Alot of buzz around NA drinks

**Purchase Last 3 Months
Incidence Among
American Adults:**

- 1.7% NA Beer
- 1.2% NA Spirits
- 1.1% NA Wine



Non-Alcoholic Spirits / Social Tonics



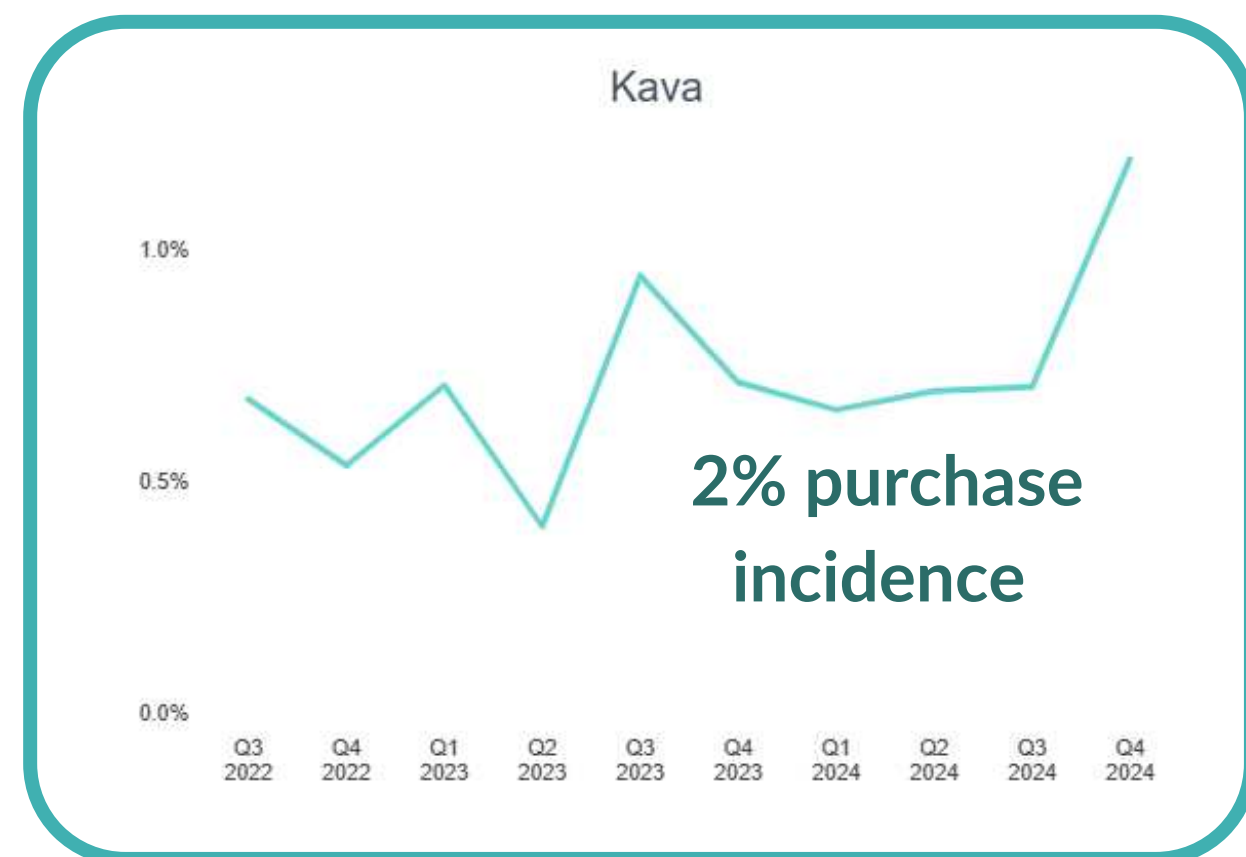
Source: Brightfield Group; Wellness Consumer Insights; Q4 2024

Source: Brightfield Group; Wellness Social Listening; Dec 2024

Kava is a growing alcohol alternative

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

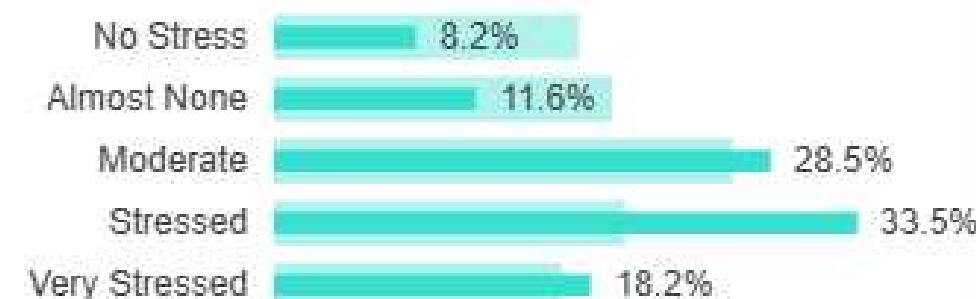
Kava bars are an exciting non-alcoholic arrival to cities like Austin, Brooklyn, and more.



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

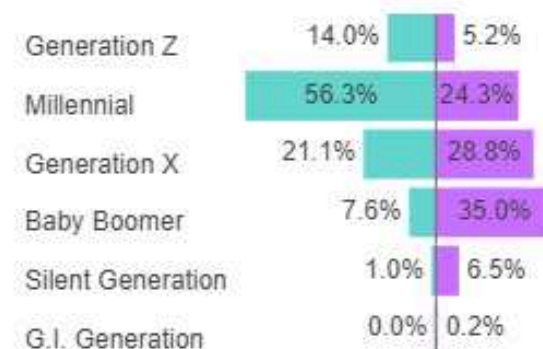


Typical Stress Level ⓘ



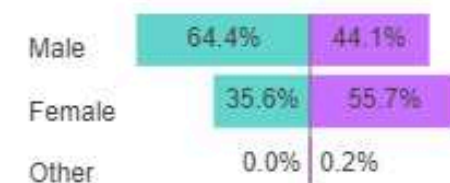
Generation ⓘ

Selected Subcategory General Population



Gender ⓘ

Selected Subcategory General Population



Science Backed Benefits of Natural Kava ⓘ



Social Uplift*



Stress Relief*



Mood Support*



Focus Support*



Restful Sleep*



Relaxation*

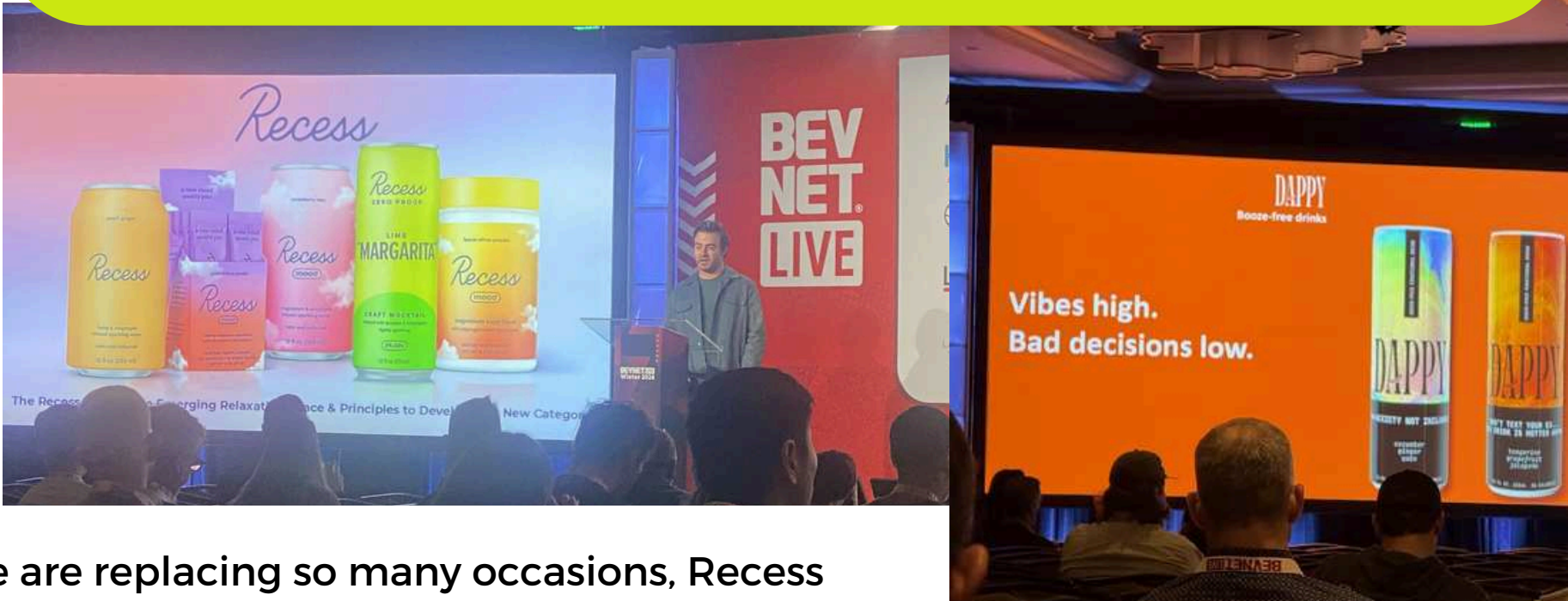


*THESE STATEMENTS HAVE NOT BEEN EVALUATED BY THE FOOD AND DRUG ADMINISTRATION

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 BRIGHTFIELD GROUP

Relaxation & Alc Alternatives

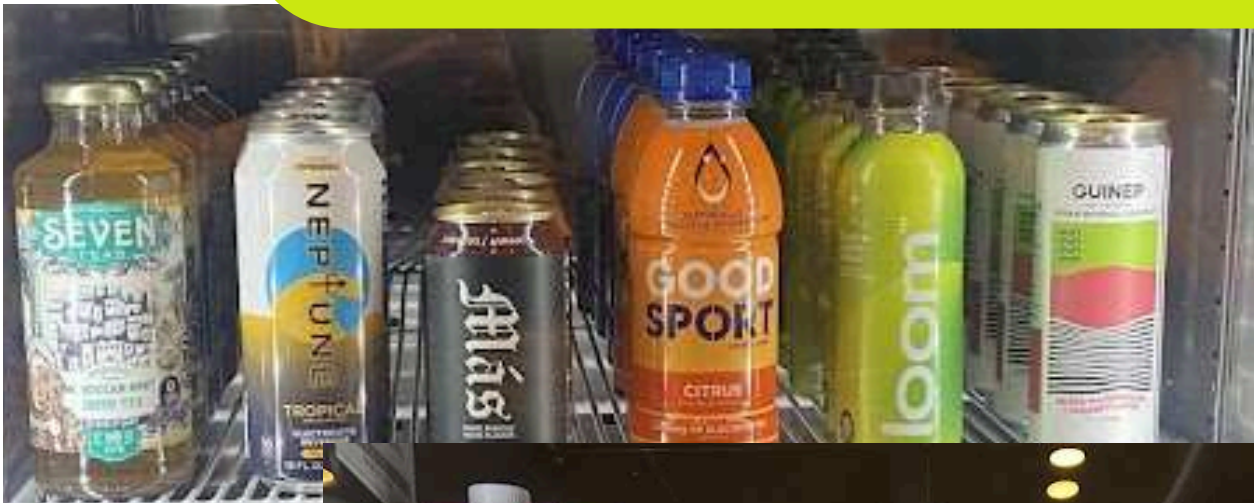


“We are replacing so many occasions, Recess for daytime, Recess for alc replacement we aren't disrupting a single category like alcohol, which makes it so exciting”
- Ben Witte, Recess

Premium Ready-to-Serve Cocktails + Functional Benefits



BFY Sodas, Coffees, Sports Drinks



BEVNET LIVE

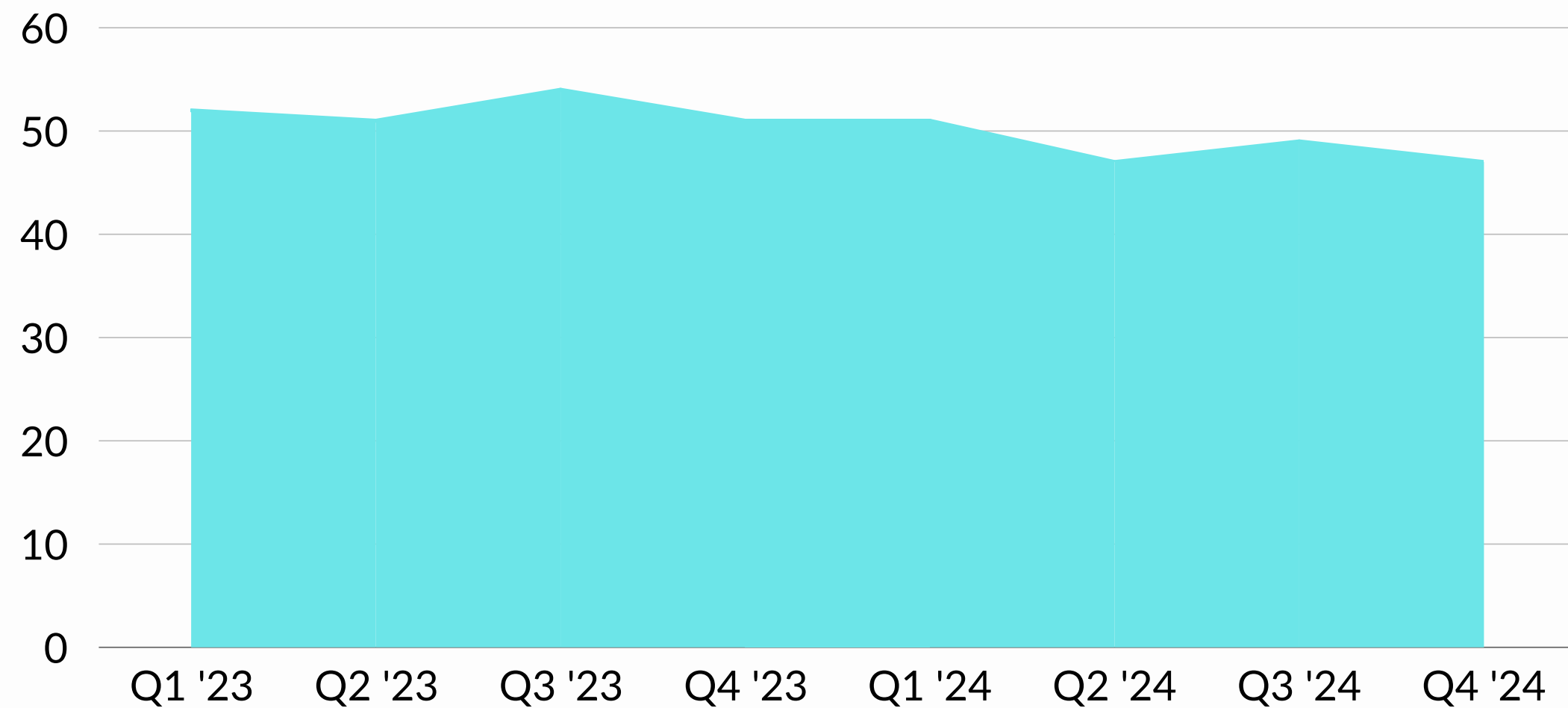


WEIGHT LOSS BOLSTERS

**At any given time,
half of Americans say they are trying to lose weight**

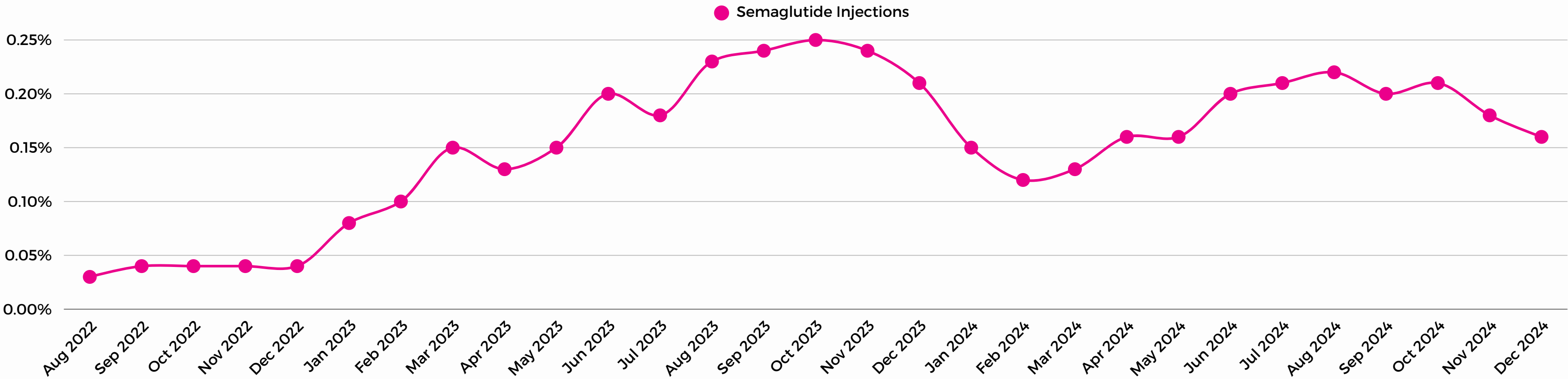
9% say they are obese

14% say they are overweight

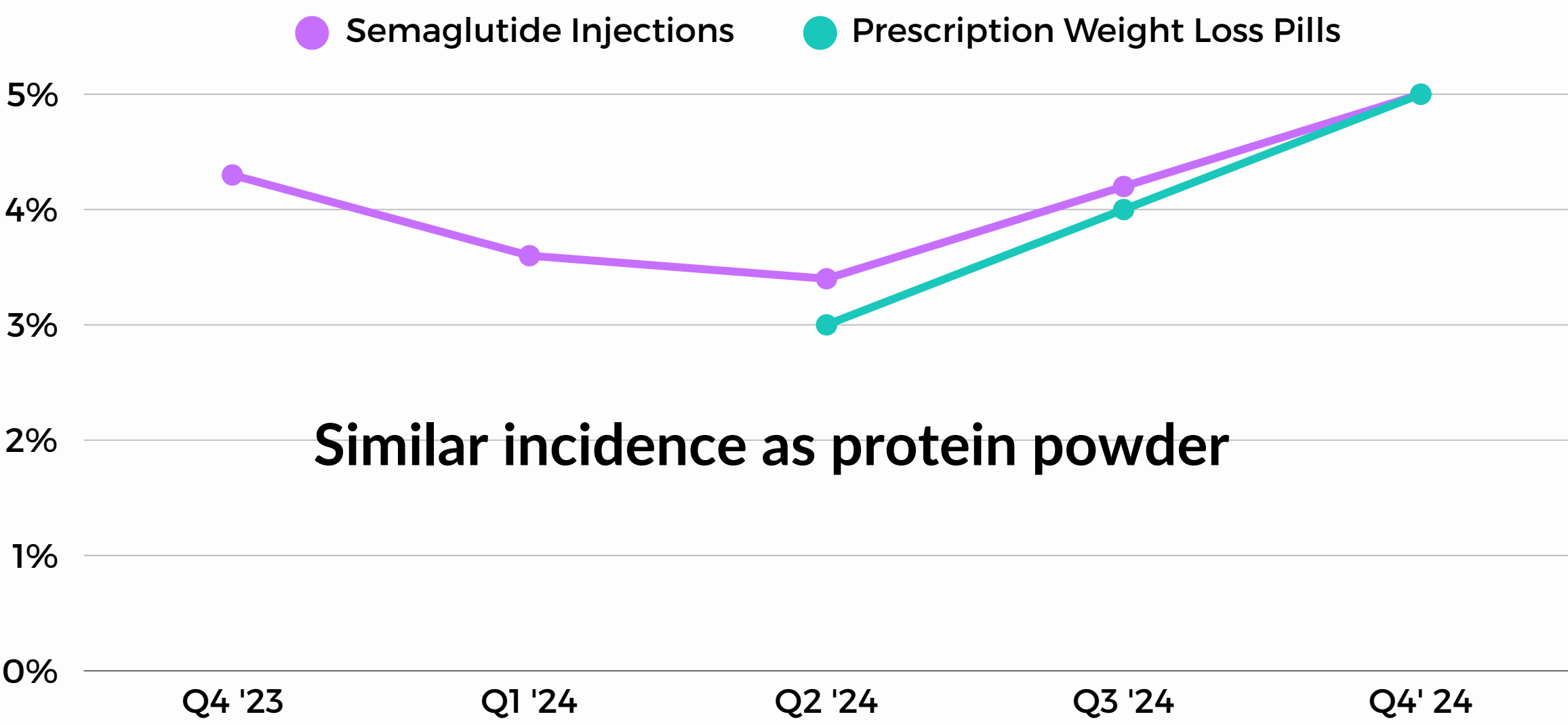


Beyond the Fad: Semaglutide Injections continue to hold steady with steady growth

Conversations about Semaglutide Overtime on Social Media



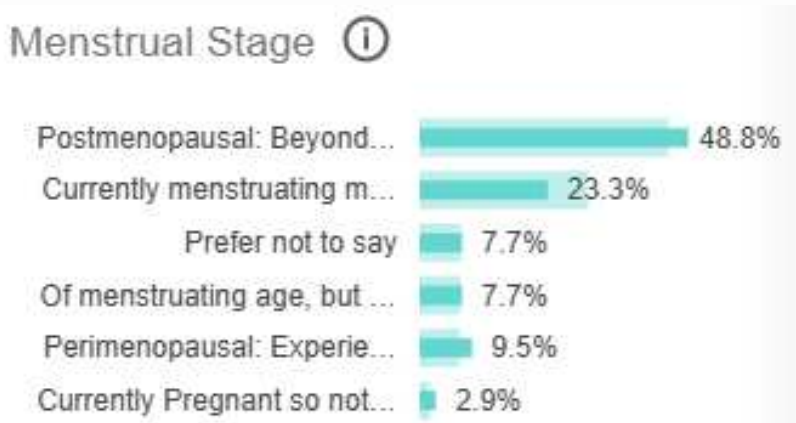
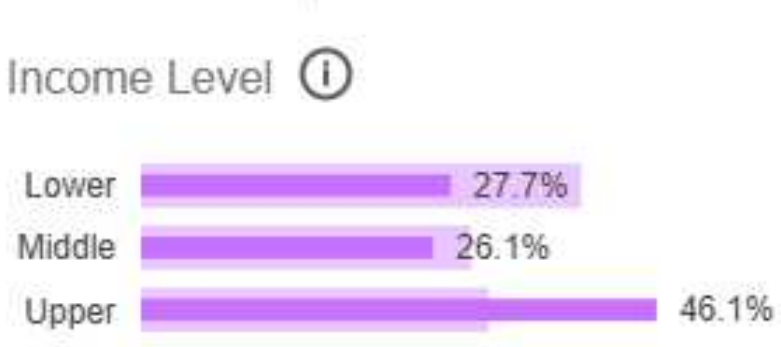
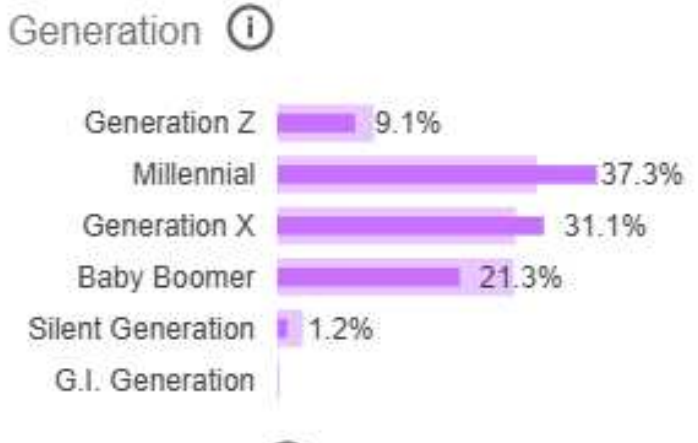
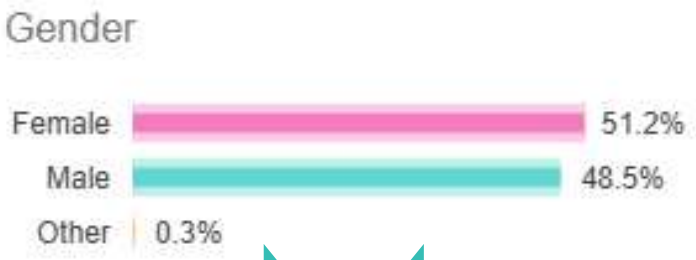
12.5 million people reported using semaglutide in the P6M



GLP-1 pills are coming, and they could revolutionize weight-loss treatment

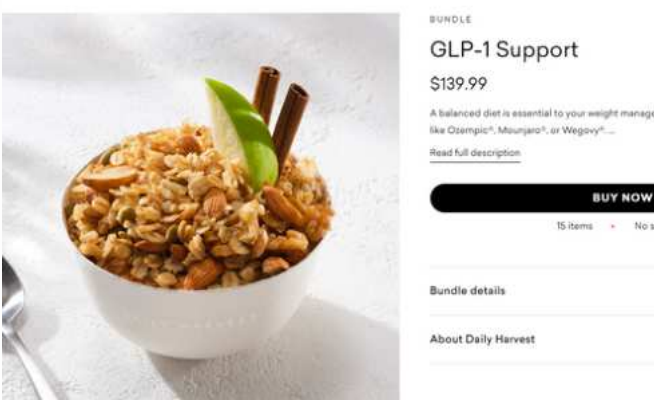
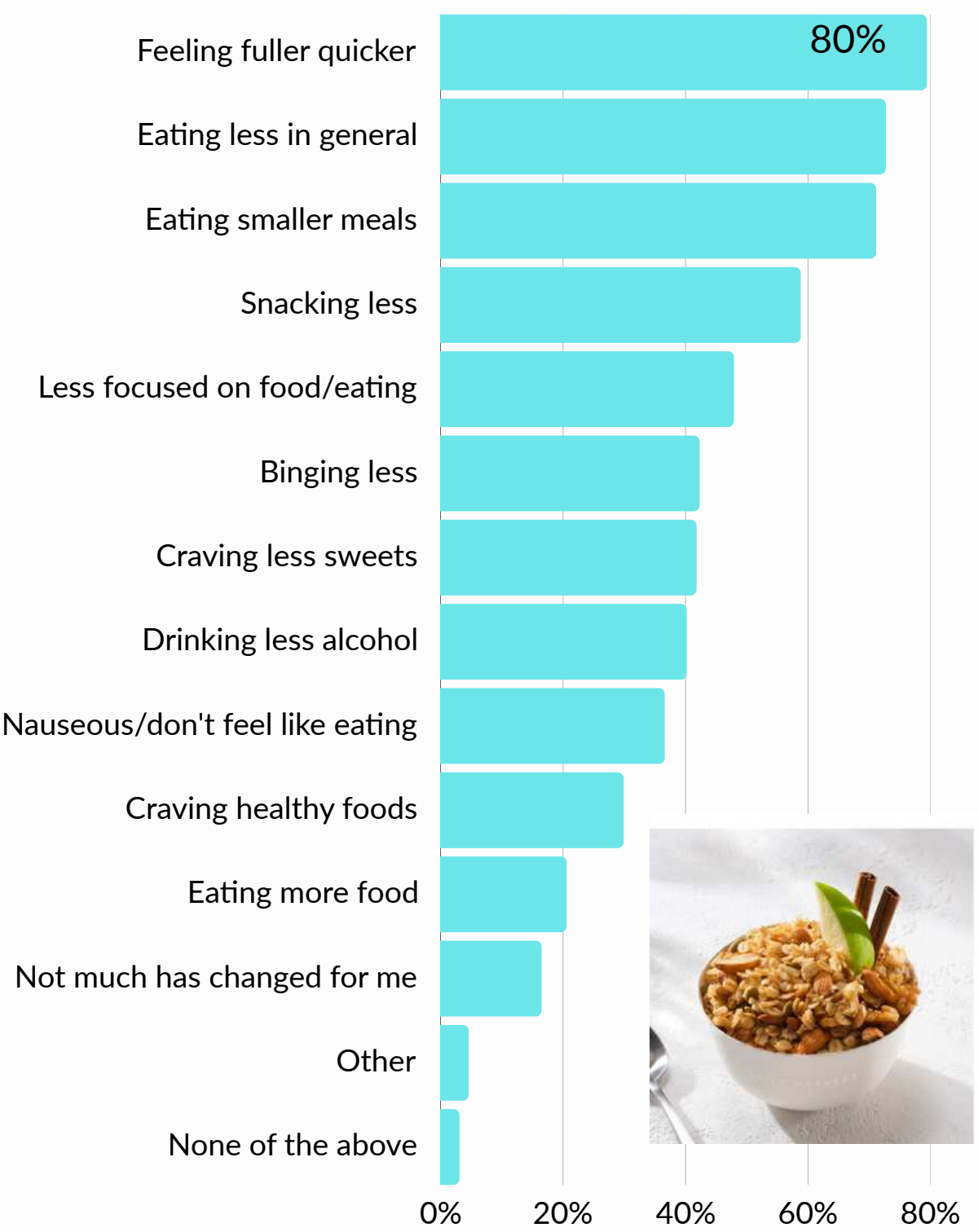
By Meg Tirrell, CNN
5 minute read · Updated 11:45 AM EDT, Tue September 17, 2024

Who are the GLP-1 Users?

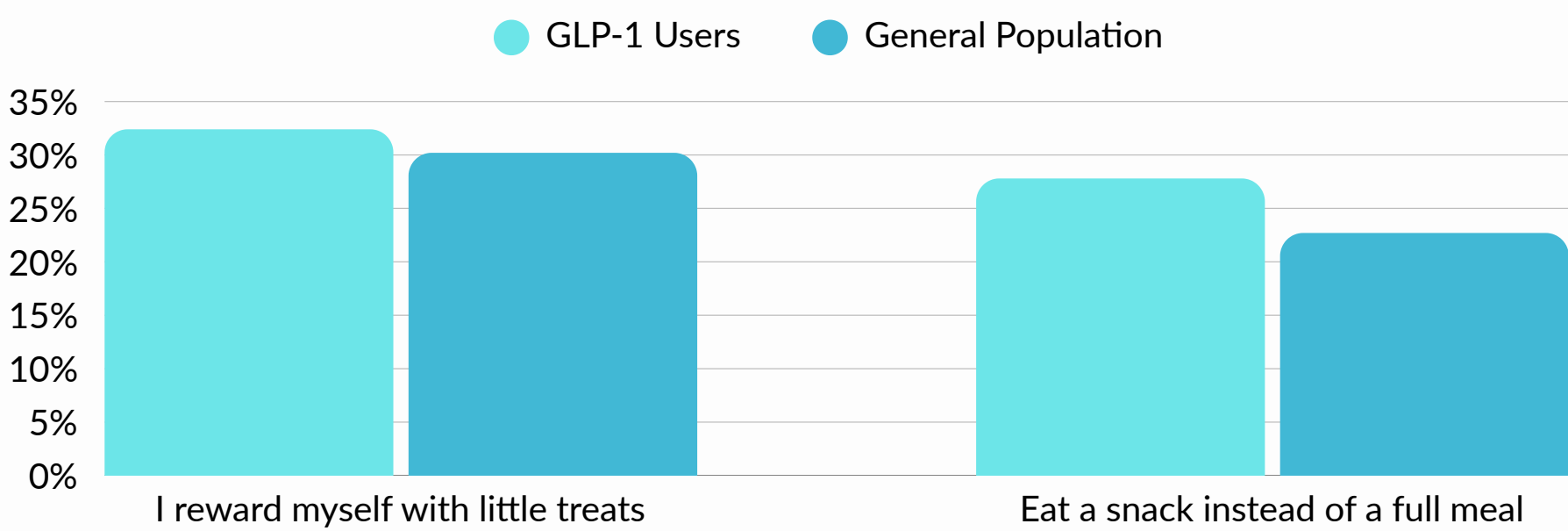


What are they experiencing ?

Semaglutide/GLP-1 Symptoms



Often Behaviors: GLP-1 Users vs. General Population

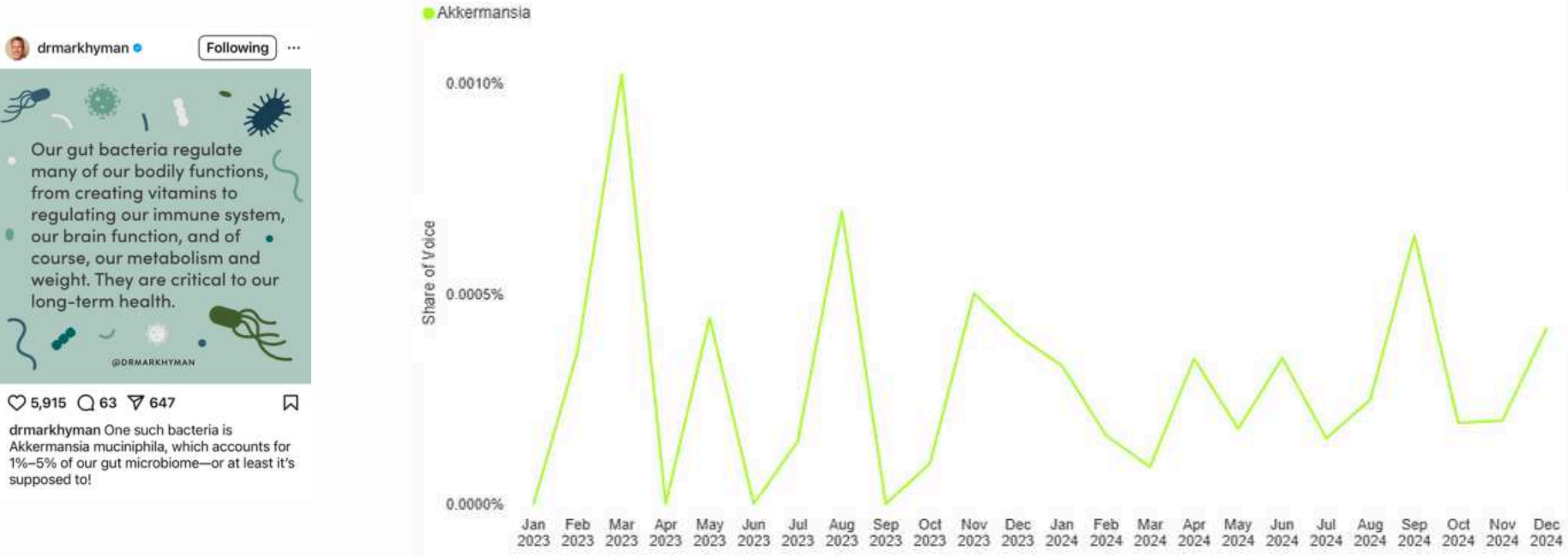


Industry Innovation

- **Nestlé** - Vital Pursuit, a line of high-protein frozen meals designed for users of GLP-1 medications ([Nestlé Global](#)).
- **Mondelez** has positioned its snack bars as ideal for GLP-1 users ([The Independent](#)).
- **Daily Harvest** offers a collection of nutrient-dense, ready-to-eat meals aimed at weight control (Verywell Health).
- **Conagra** is exploring high-protein, low-calorie snack options like beef jerky and popcorn ([The Independent](#)).

Trending Products Related to Weight Loss Besides GLP-1

Akkermansia Conversations Over Time

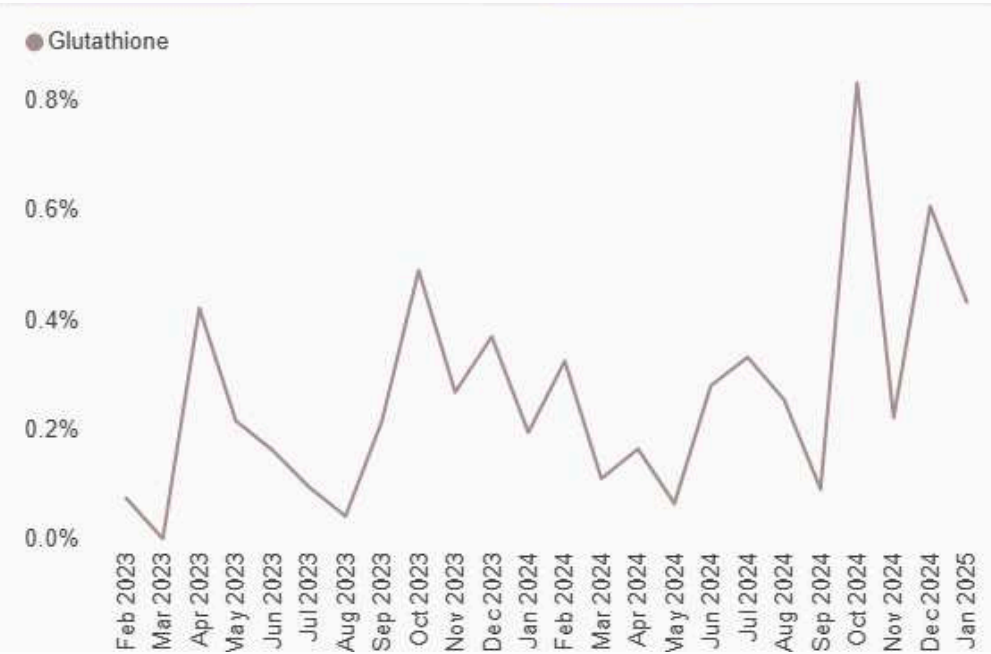


Glutathione Conversations Over Time

Indeed, Baylor College of Medicine research finds that increasing glutathione levels improves cellular fat burn by 104% and reduces liver fat by 63%. And in a Greek study, subjects with high glutathione lost 60% more weight than those with low levels. Feb 3, 2024



Doctors Say Boosting Your Intake of This Antioxidant Can ...





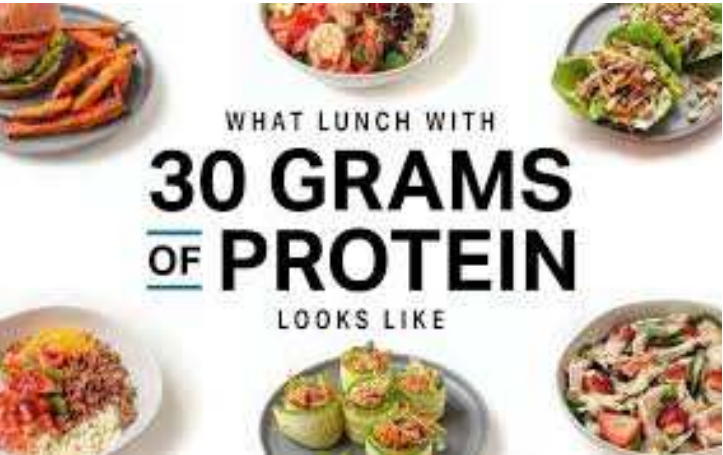
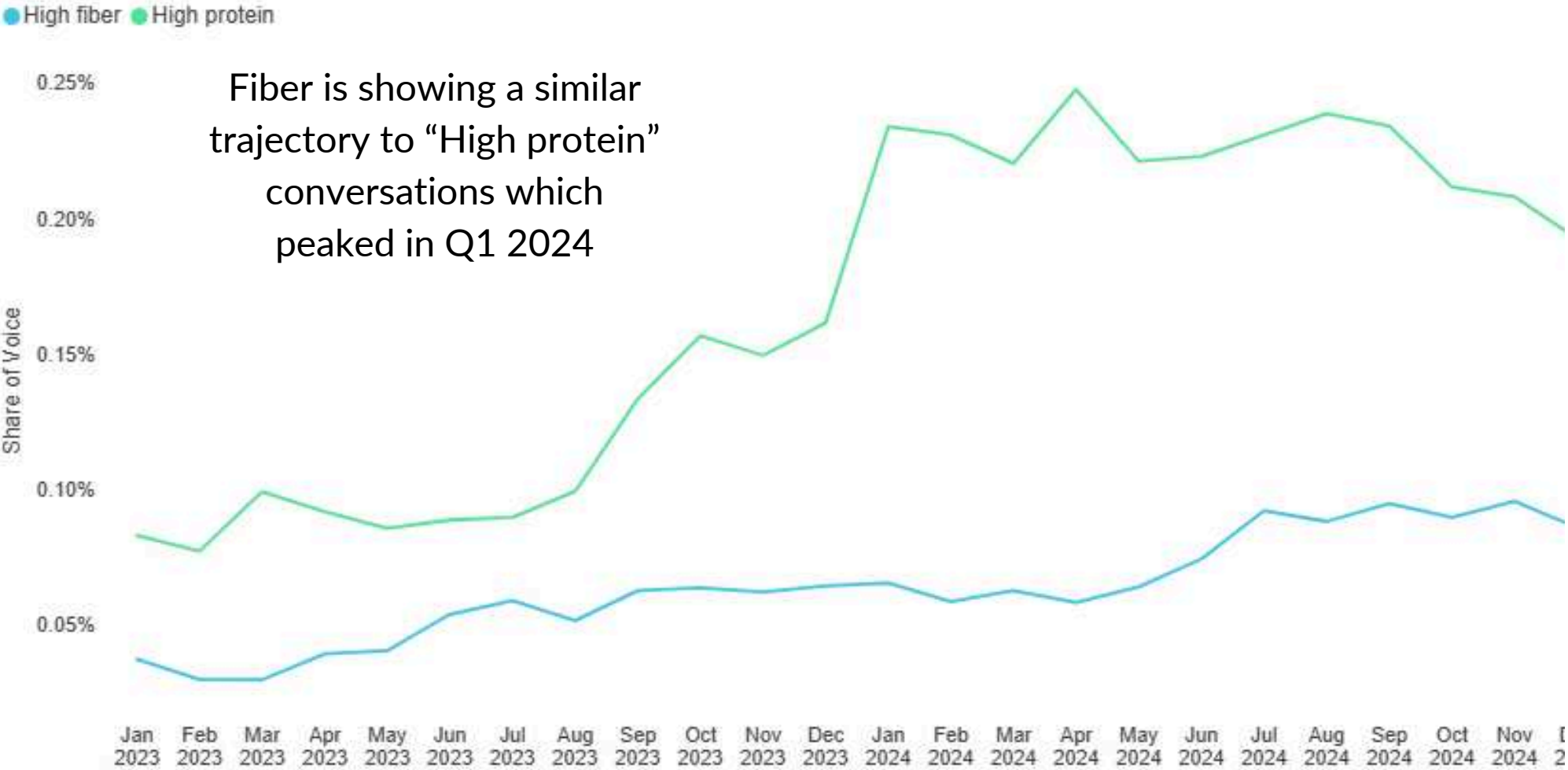
**PROTEIN IS
HERE TO STAY
BUT FIBER
COMING IN
PLAY**

Focus used to be just Protein, now we are seeing Protein + Fiber

Protein/Fiber

2 percentage point increase in consumers saying they are looking for products that say high in fiber

High Fiber and High Protein Conversations Over Time



From 30g Trend to 30-30-3

DAILY 30-30-3

1 30g Fiber + 2 30g Protein in 1st Meal + 3 Probiotic Foods

fastingmnd 30-30-3 save this and use this as a guide

For my audience that is in their late 30s, 40s 50s and beyond—this is going to be the roadmap that you can start with to really take control of your perimenopausal symptoms.

Share this info with someone else who feels stuck. Most importantly—thank you for your interest.

I go into much more detail and my podcast called, Save yourself.

36w

vivianmaheu This is awesome! Thanks!

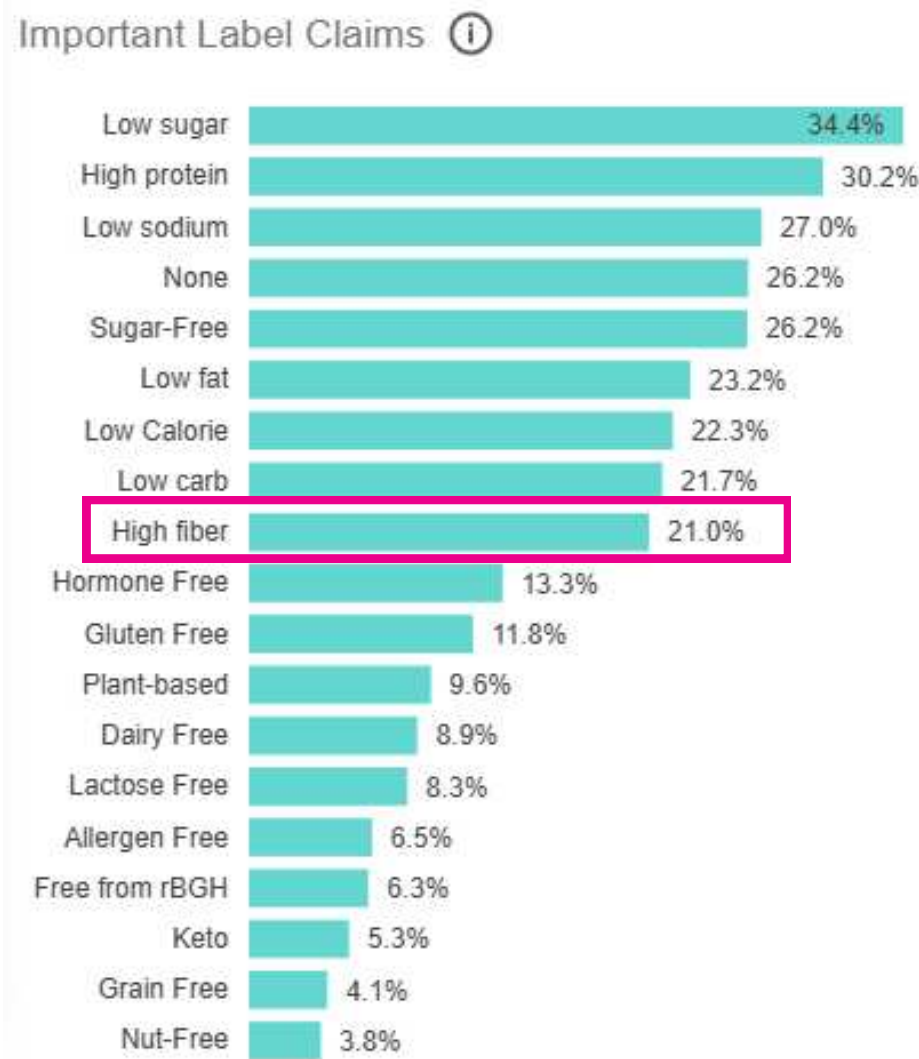
3,578 likes

Mar 15, 2024

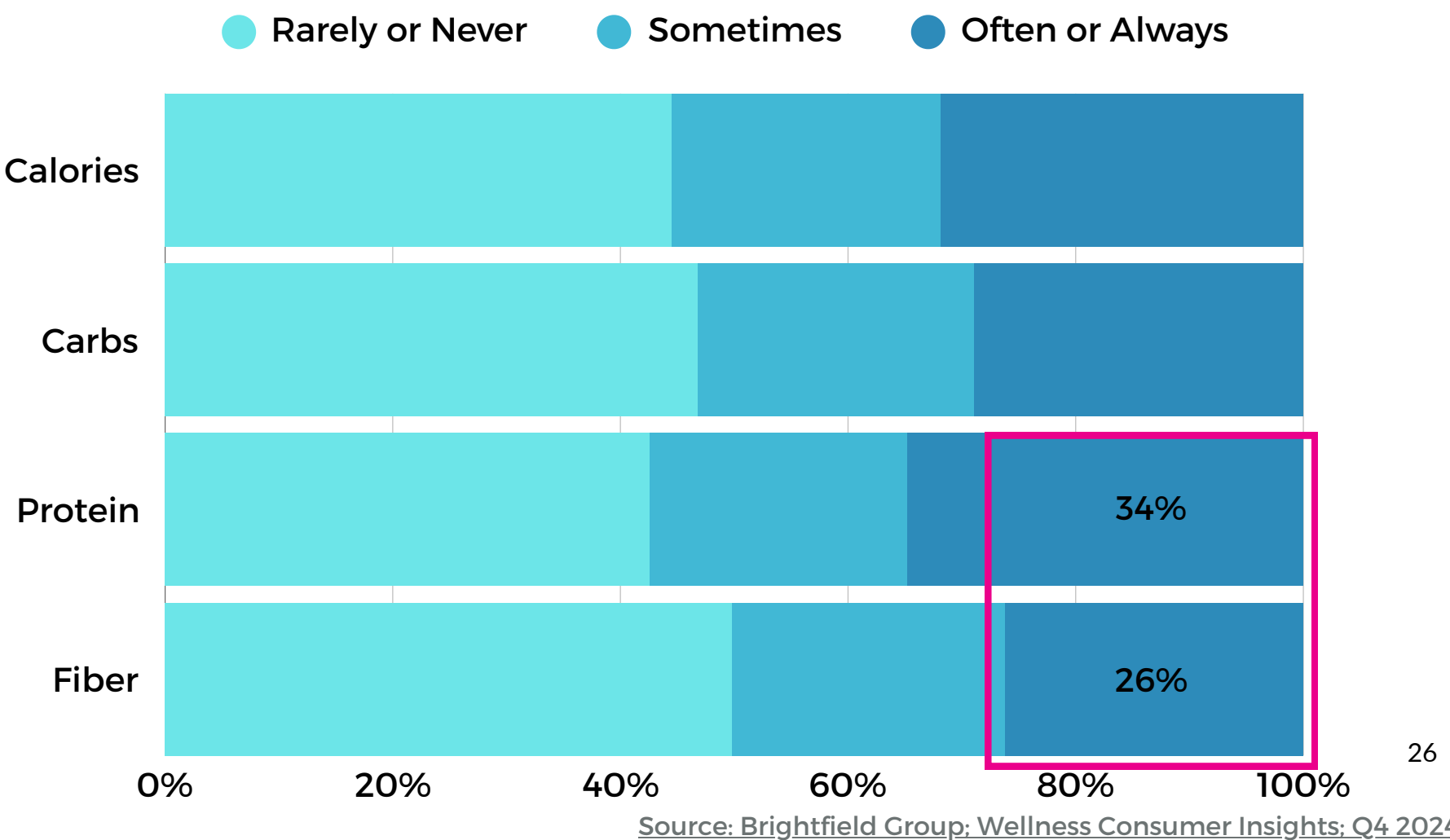


End of 2024 - About a fifth of consumers are focused on high fiber

Important Label Claim



Track Daily Consumption



We want permission to eat carbs



FOOD AND RESTAURANT TRENDS EATER AT HOME

Sourdough Is Having a Moment... Again

Some people never stopped baking. Others just want to show off their crumb shots.

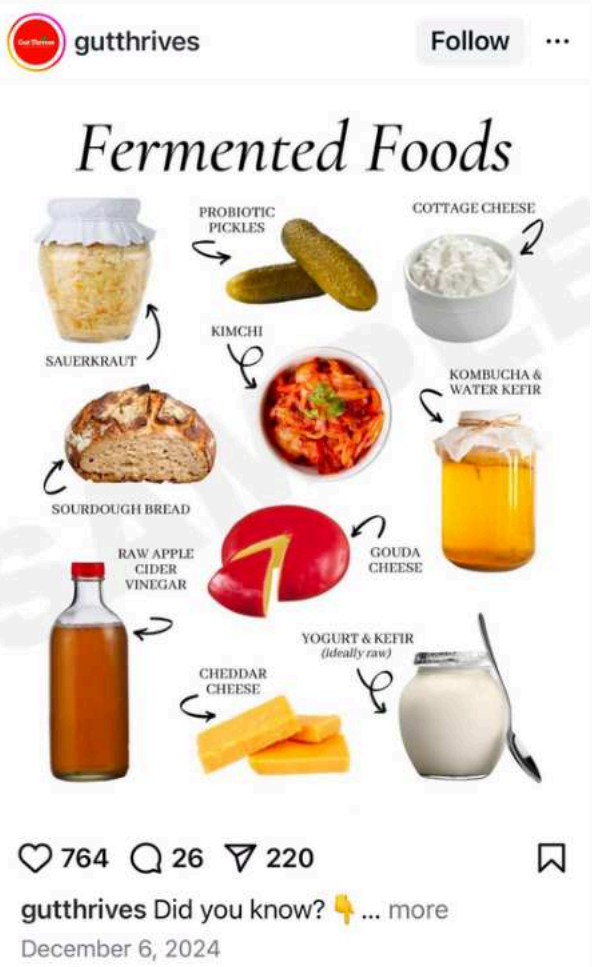
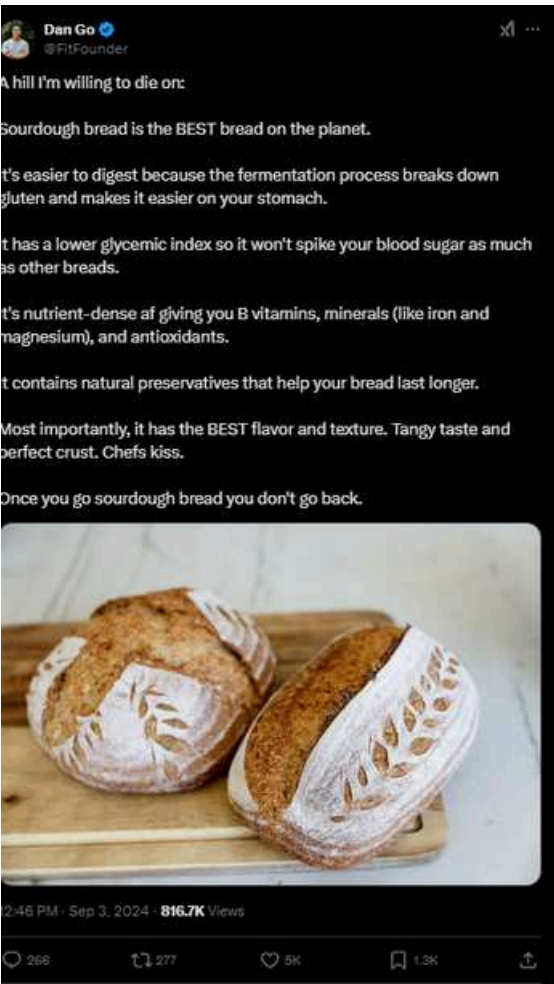
by Amy McCarthy | Mar 12, 2024, 10:00am EDT



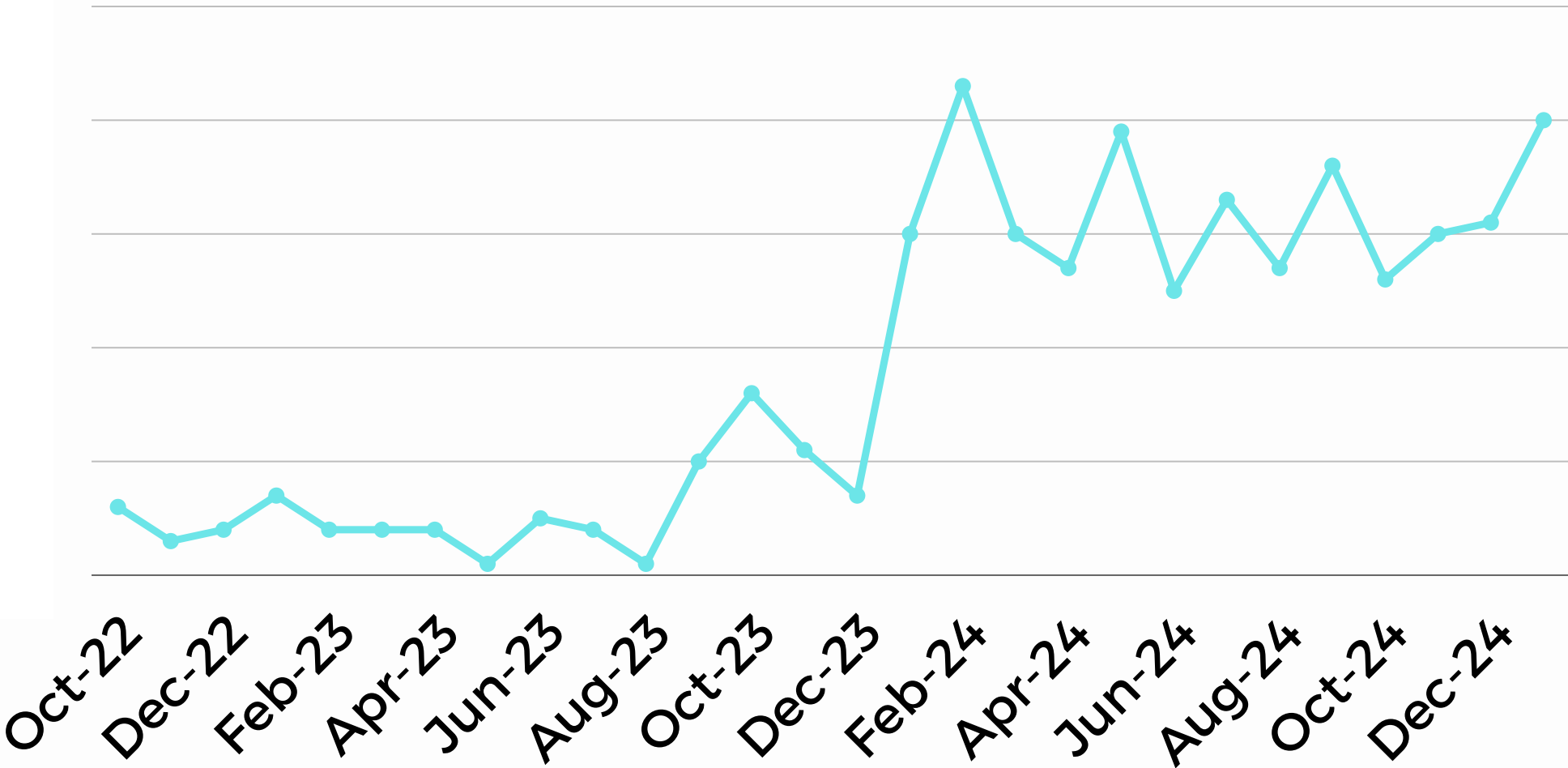
The pandemic-fueled sourdough frenzy isn't over

FEBRUARY 18, 2024 · 6:01 PM ET

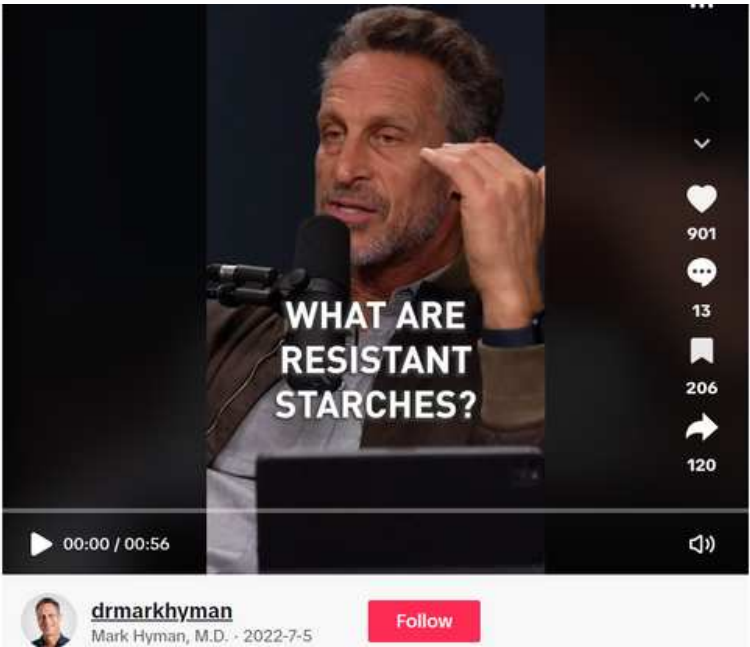
HEARD ON ALL THINGS CONSIDERED



Sourdough Conversations Over Time



Conversations about resistant starch are starting to pick up

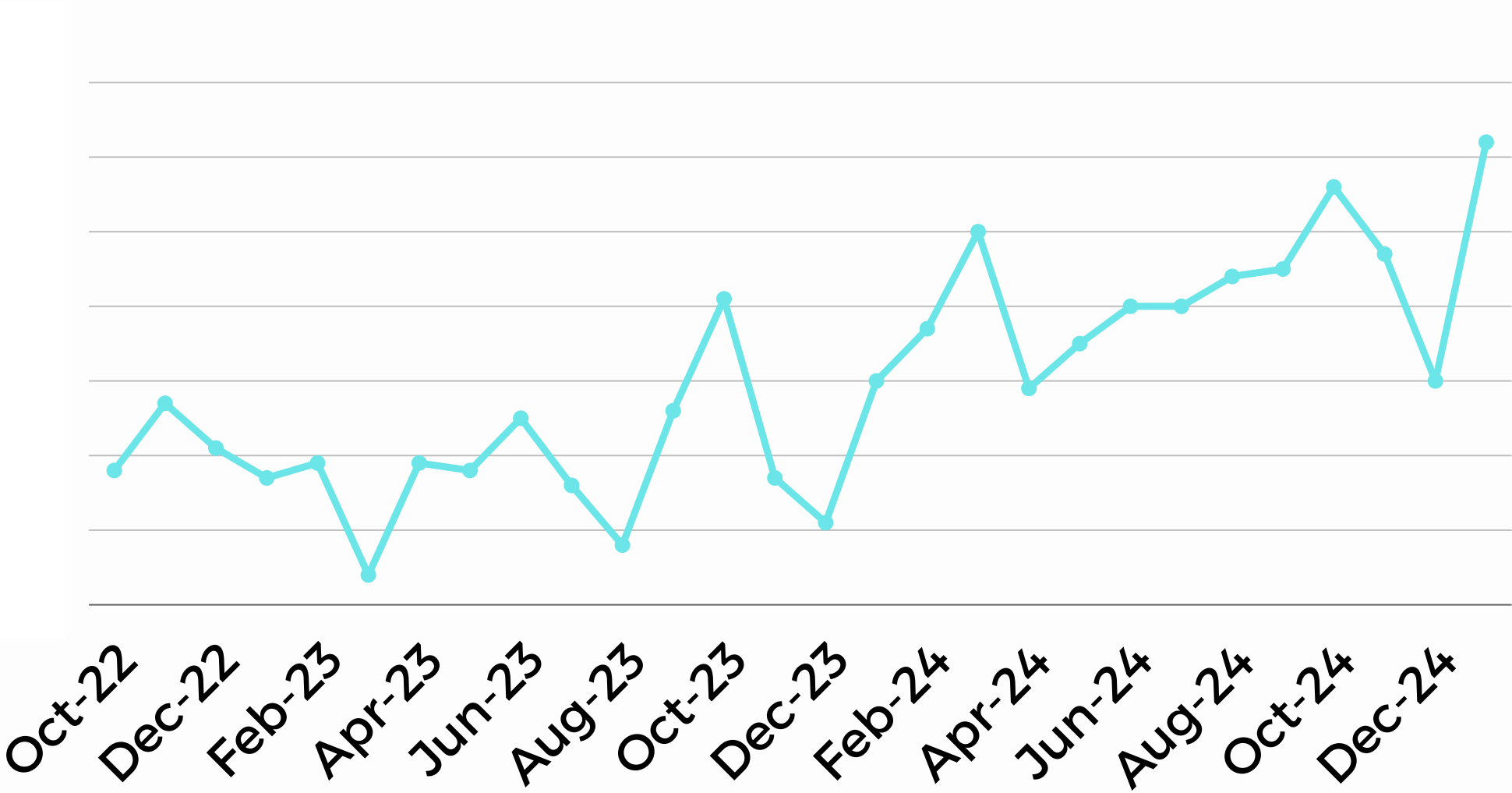


Refrigerated rice and my blood sugar. Does coolin...

foods that are high in
Resistant Starch

 Rice (brown, white, black, red) Cooked / Cooled Salad / Side Dish Add to cooked soup	 Barley Pearls Cooked / Cooled Salad / Side Dish Add to cooked soup
 Oats (groats, steel-cut, rolled) *Groats Cooked / Cooled *Salad / Side Dish *Mix rolled & steel-cut - try overnight oats! *Groats coarsely ground - add to oatmeal!	 Heirloom Wheat Berries *Cooked / Cooled *Salad / Side Dish *Coarsely Ground - add to your favourite bread recipe!
 Green Bananas / Flour *Eat Raw *Blend - add to baking, smoothies, yogurt, ice cream *Use Green Banana Flour in place of go-to flours	 Raw Potatoes *Cooked / Cooled eaten as potato salad *Blended into a smoothie if you're feeling brave! *Dehydrated into raw chips
 Peas *Cooked / Cooled *Add to resistant starch grain dishes *Made into a dip	 Beans & Chickpeas (Pinto, Kidney, Black, White Beans, and Chickpeas) *Soaked to remove antinutrients, Cooked / Cooled *Salad, side, or main dish *Dip, dip, dip - who doesn't love hummus?!

Resistant Starch Conversations Over Time



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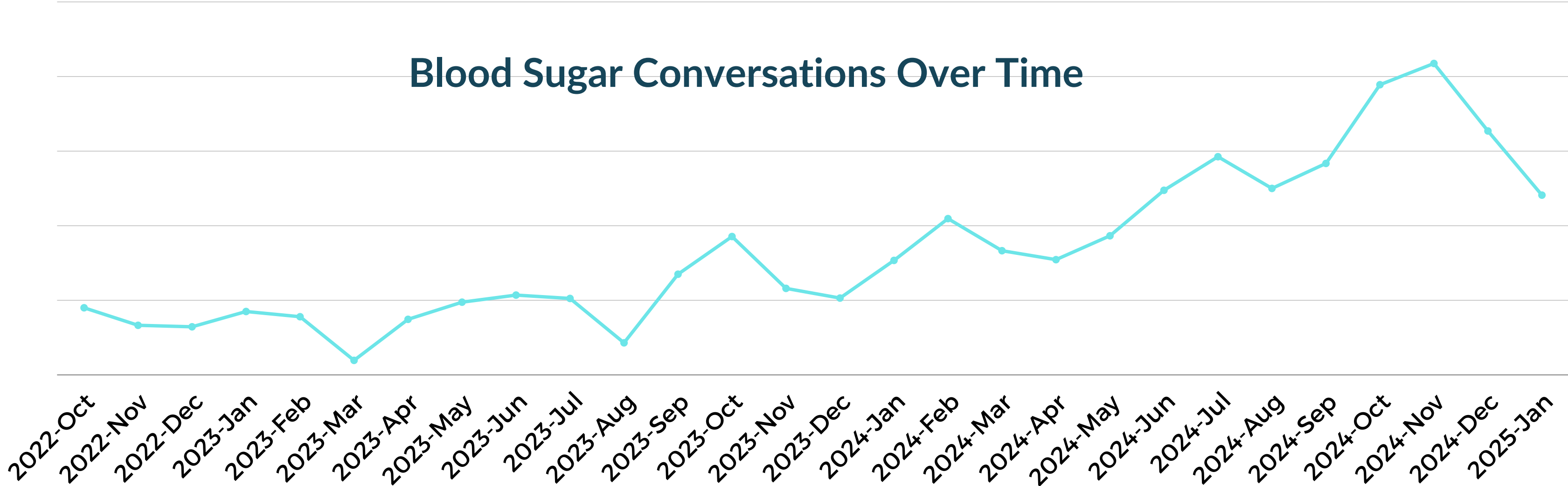
Bevnet50

[Learn more](#)

Consumers continue to think about Blood Sugar and Glucose

Protein/Fiber

Blood Sugar Conversations Over Time



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

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

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.

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



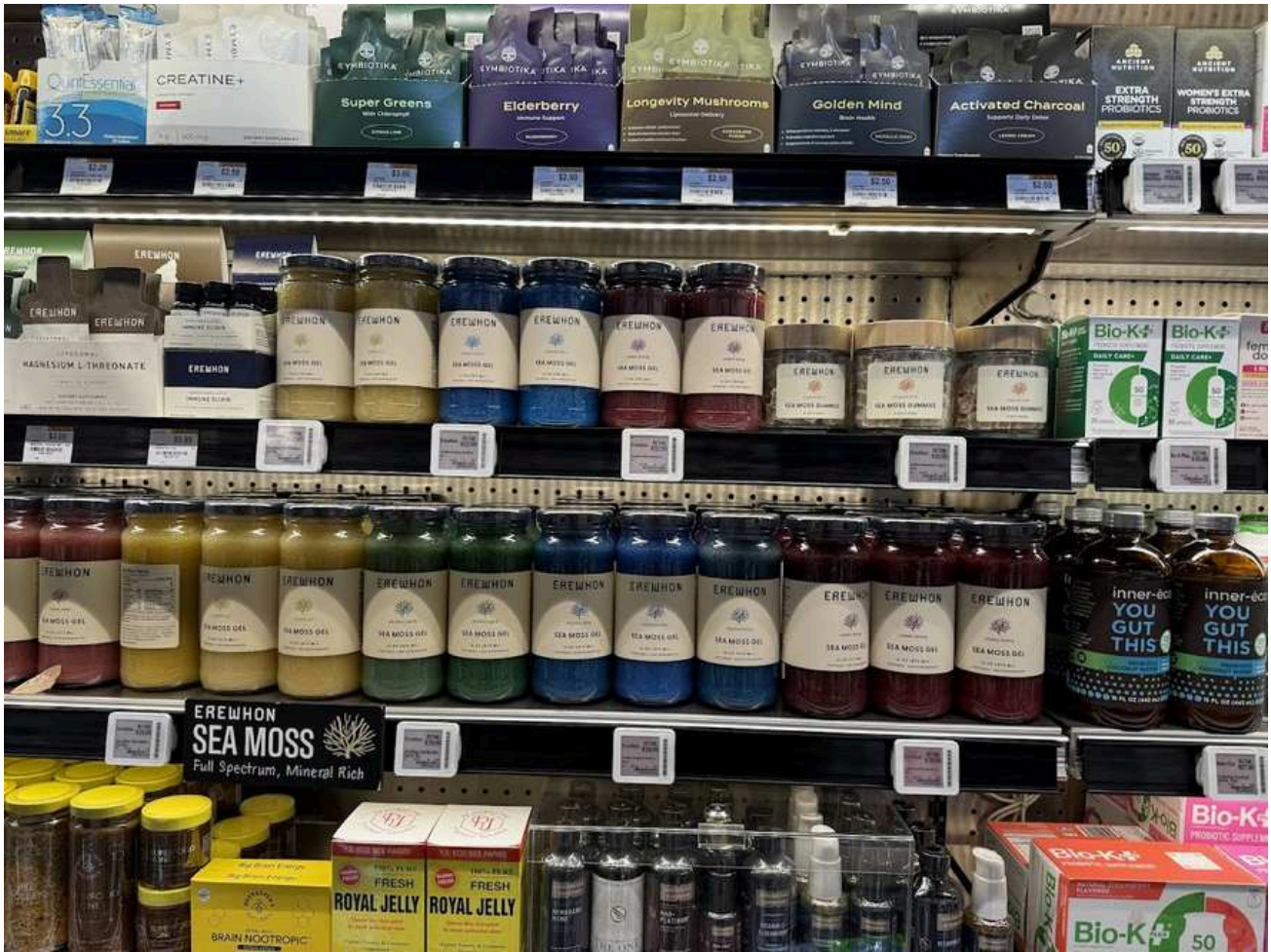
ARE SEA PRODUCTS THE NEW FUNCTIONAL MUSHROOMS?

Ocean’s secret stash of plant-based nutrients, with our exclusive Sea-biotics

We saw so many sea forward options in LA and at BEVNET



Sustainably harvested
Deep Ocean Minerals



Irish Moss/Sea Moss is taking off on social and in purchasing



farmacyforlife Key Glock · Let's Go

Farmacy For Life
@farmacyforlife

Sea Moss is the only herb on the planet that contains 92 of the 102 minerals your body needs to thrive.

It is the superfood of all superfoods.

1,349 likes, 10 comments, 324 shares

farmacyforlife If you haven't taken your Sea Moss yet, this is your reminder! Send this to your loved ones so they can remember to take their capsules too. More energy, better focus, less headaches & an overall better bill of health.. Sea Moss gon get you right 🍌

meelah_moss Houston, Texas

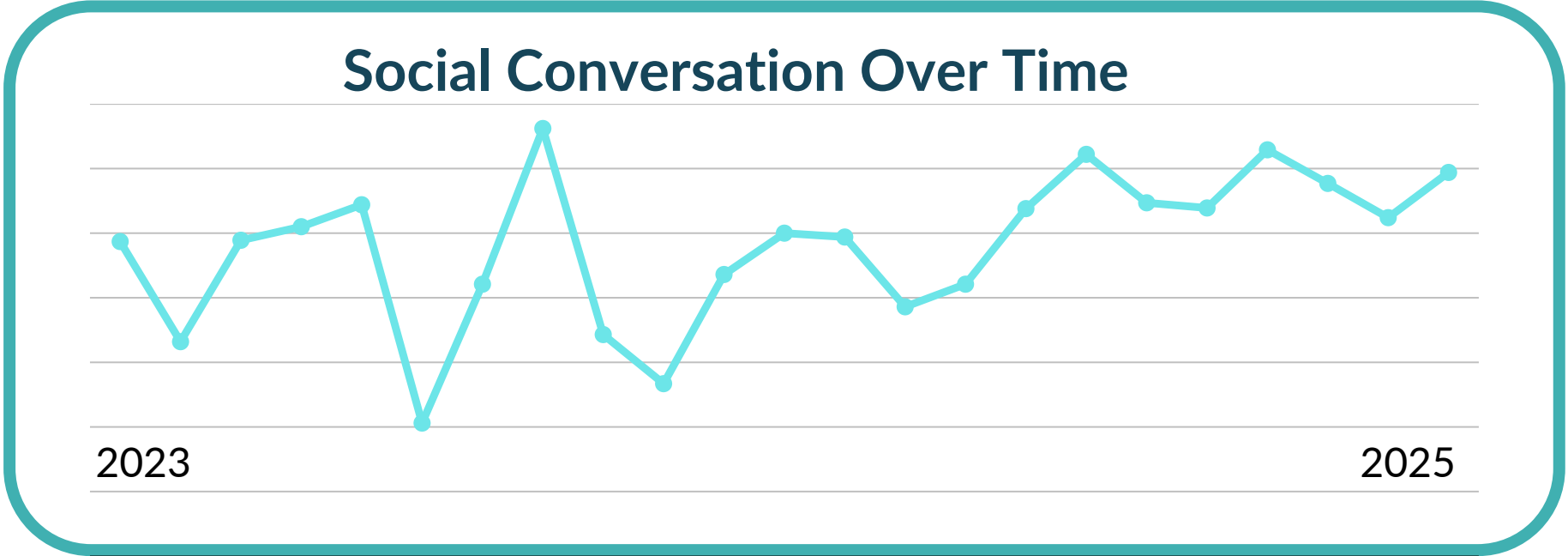
SEA MOSS BENEFITS

- Detox
- Immune System Support
- Help the body get rid of excess Mucus
- Weight loss
- Reduce Inflammation
- Thyroid Support (due to its High level of Iodine)
- Contains amino acids, omega3 fatty acids, antioxidants, essential vitamins, and minerals.
- Mood booster
- Nourish Hair and Skin (perfect for wrinkles, and skin conditions such as psoriasis, eczema, etc.)

223 likes, 15 comments, 157 shares

meelah_moss Discover how sea moss... more

July 11, 2024



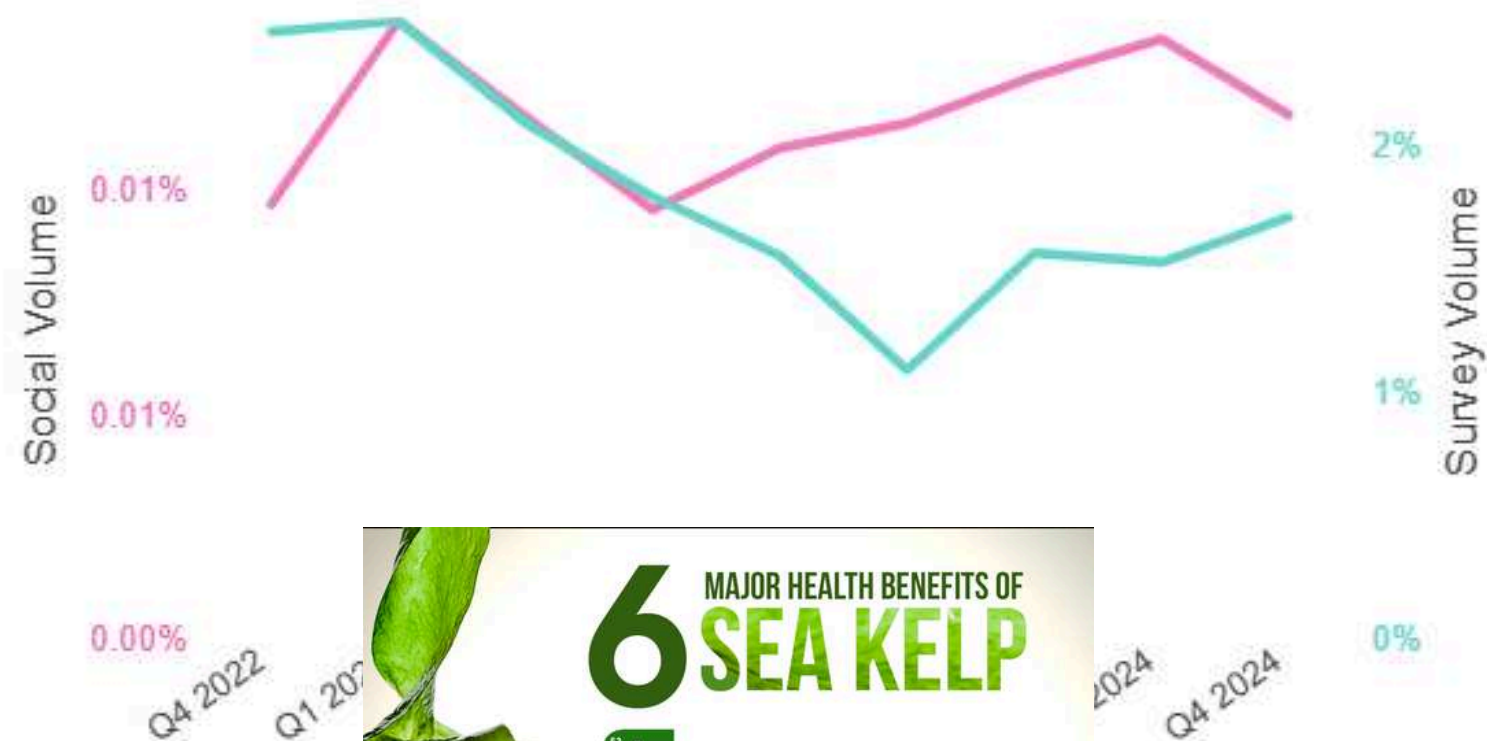
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Source: Brightfield Group; Wellness Social Listening; Dec 2024

Trending Sea Product Products and Ingredients

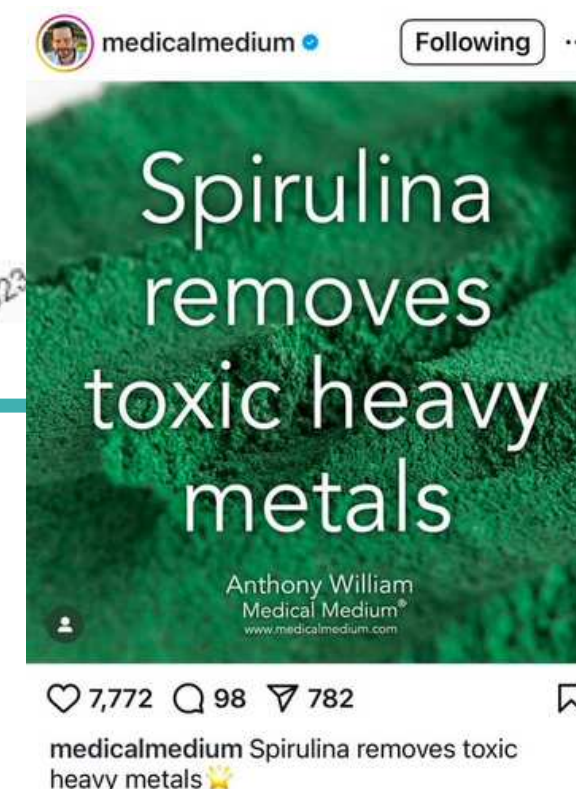
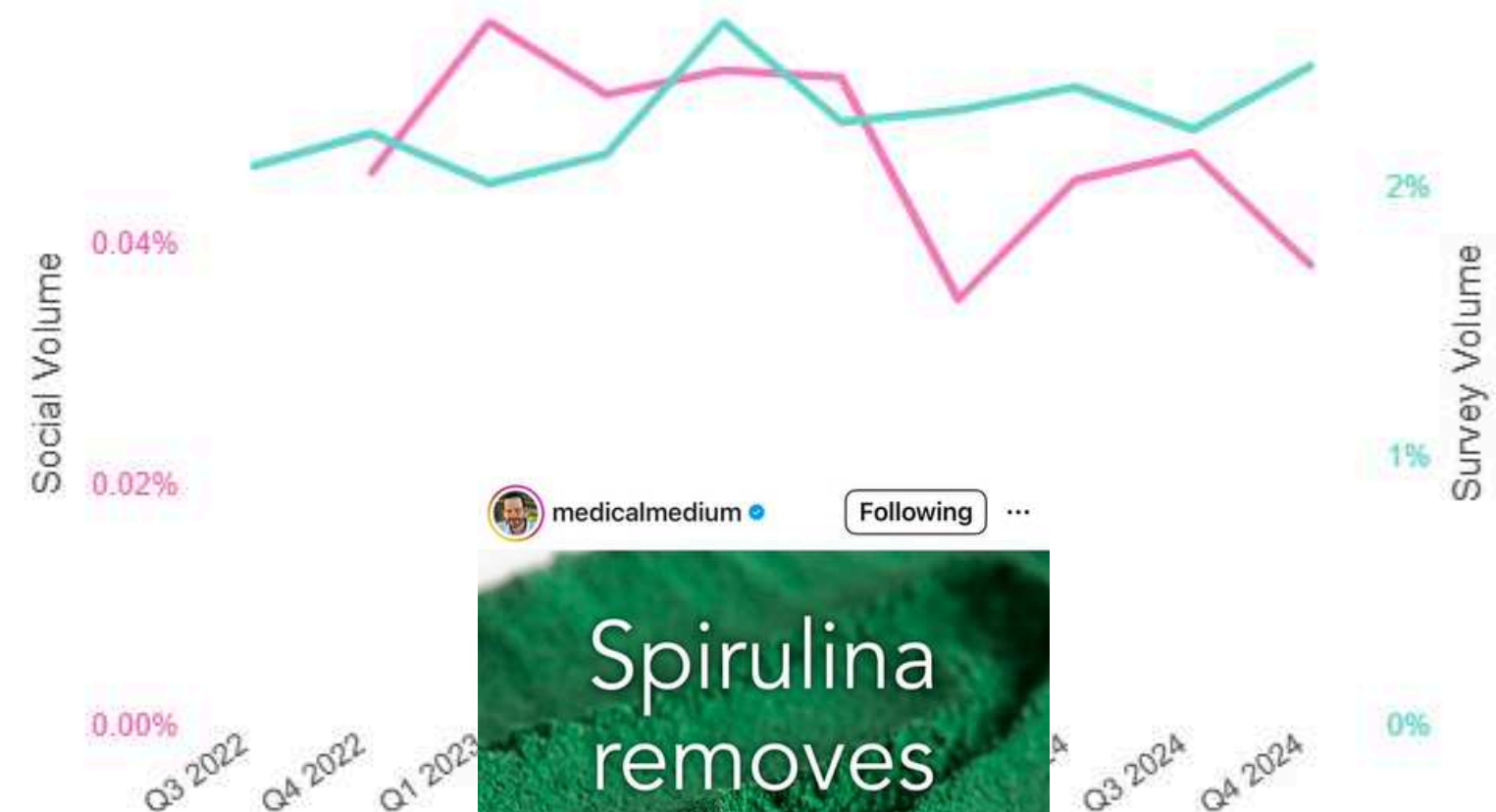
Kelp

● Social Volume % ● Survey Volume %



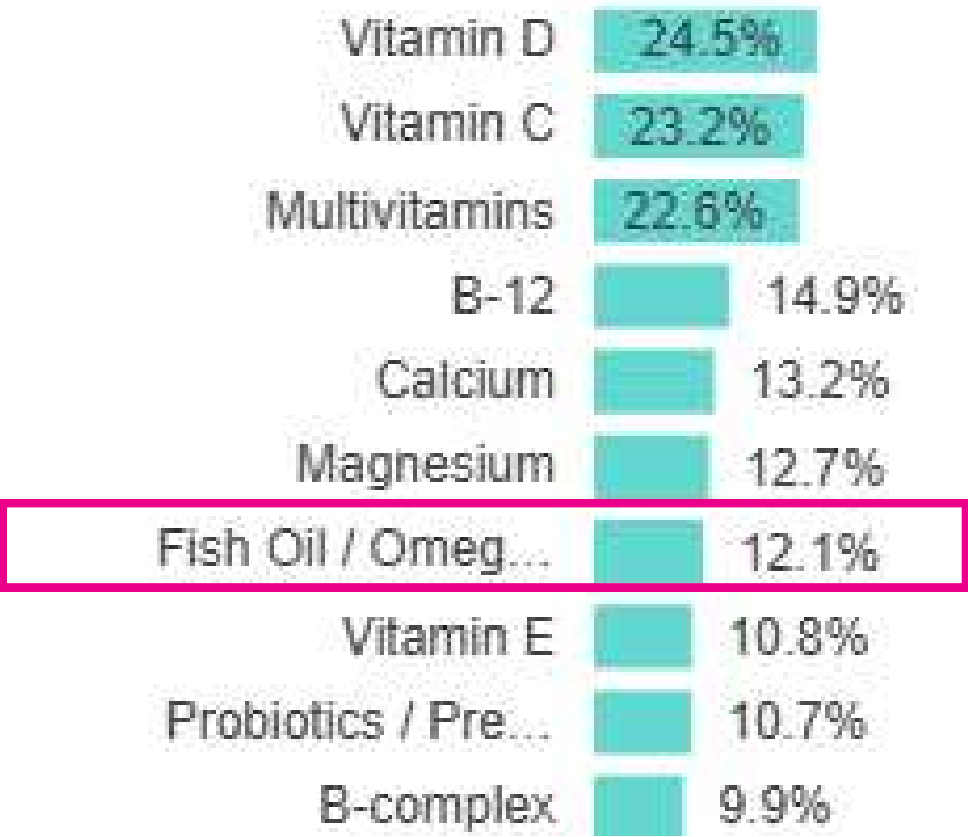
Spirulina

● Social Volume % ● Survey Volume %



The OG Sea Supplement, Fish Oil/Omega 3/6, is in the top 10 purchased but some growing chatter around Krill Oil

Purchase P3M Incidence





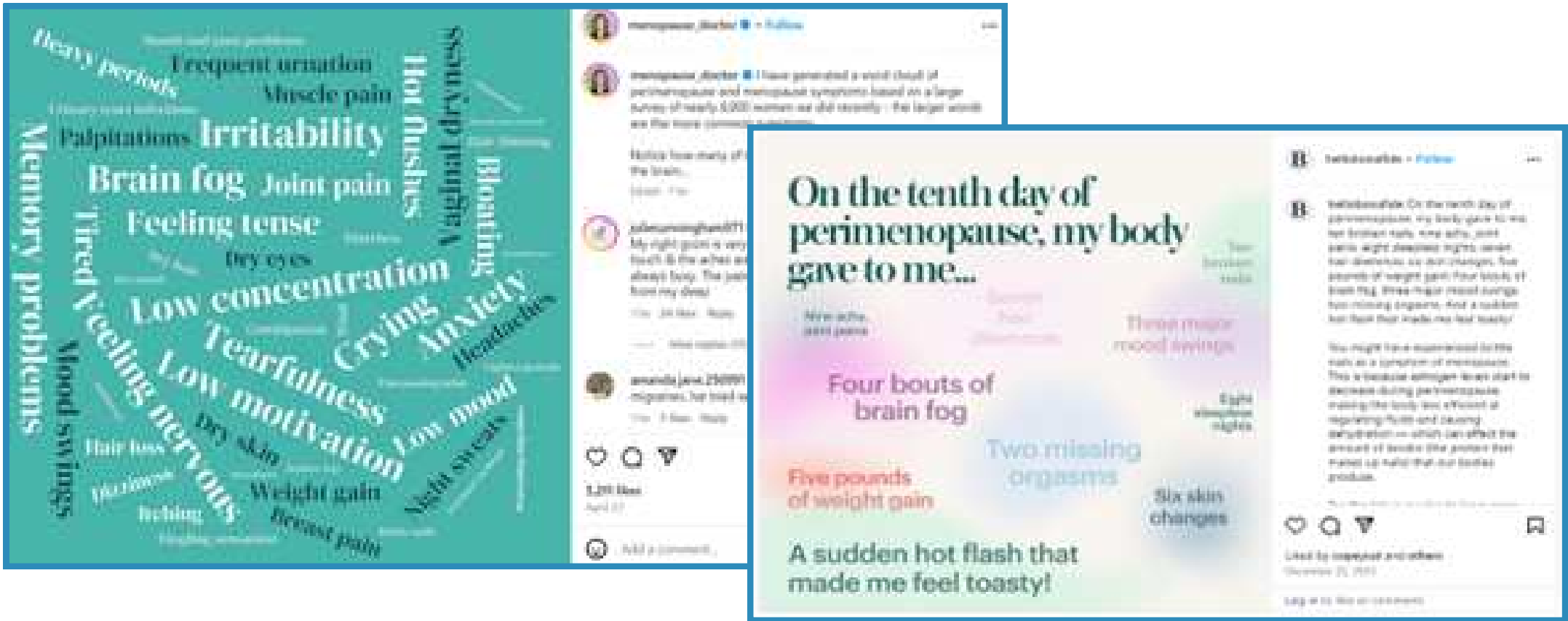
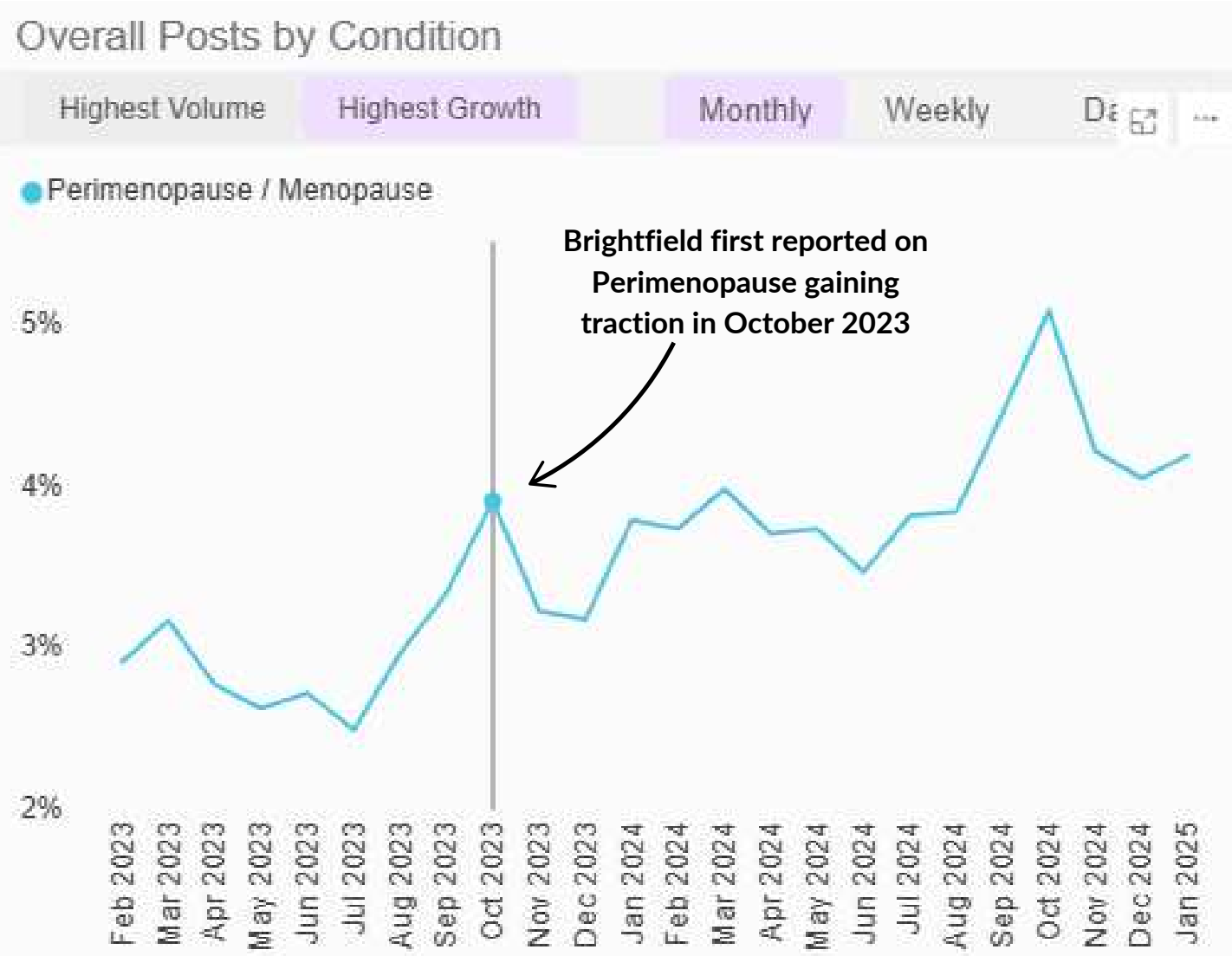
PERIMENOPAUSE UPDATE



IT'S STILL BOOMING ON SOCIAL

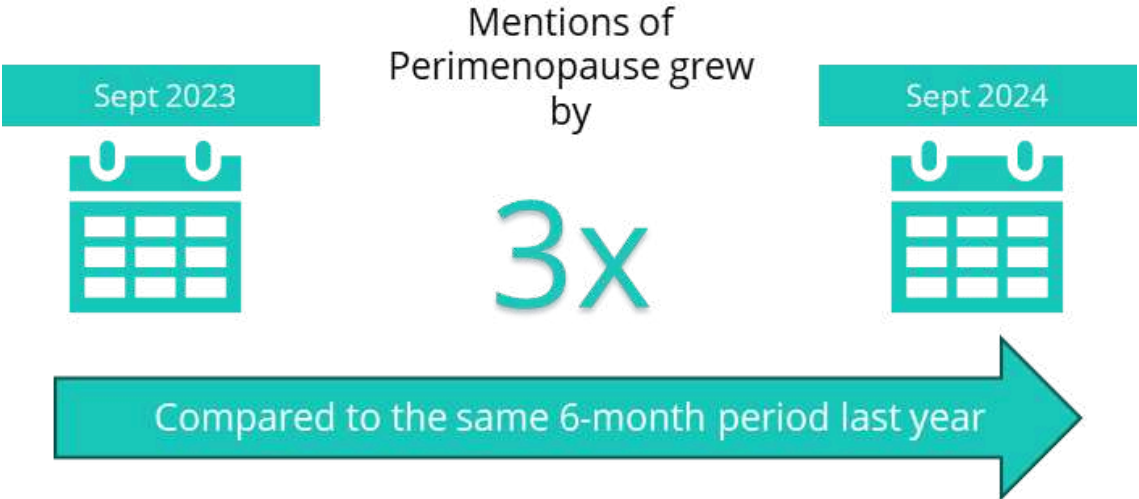
Discussions about Perimenopause continue to rise on social

Discussions about Perimenopause Continue to gain traction on social media as women turn to these platforms to compare experiences, learn relief tactics, and share product recommendations for the variety of symptoms experienced during this phase of life.



+40% Growth Rate (CMGR) amongst conversations about conditions

4% Share of Voice



Mentions of Perimenopause + Ingredients reveal opportunities for innovation

Established Trend



Ingredients with a high Share of Voice but low or negative growth. Still very relevant for the Perimenopause conversation, but may be saturated.

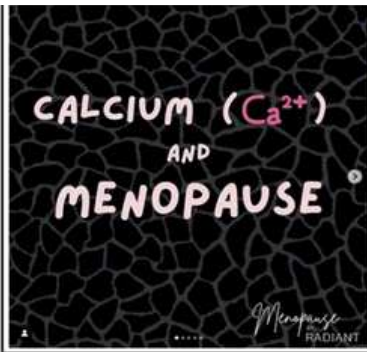
-8%
Growth
Rate

Collagen
13% SOV

-8%
Growth
Rate

Probiotics/Prebiotics
7% SOV

Innovation Opportunities



Ingredients with a healthy Share of Voice and Strong Growth. Consider these for innovation opportunities, and/or, reach new audiences by positioning existing products with these ingredients to perimenopause audiences.

+78%
Growth
Rate

Magnesium
6% SOV

+84%
Growth
Rate

Calcium
6% SOV

+130%
Growth
Rate

Vitamin D
6% SOV

Future Potential



Ingredients with a low Share of Voice but strong growth. Proceed with caution since these trends may be just “flash in the pan”. Consider seeing how these trends align with your key segments

+665%
Growth
Rate

Glutathione
.62% SOV

+373%
Growth
Rate

Ashwagandha
1.6% SOV

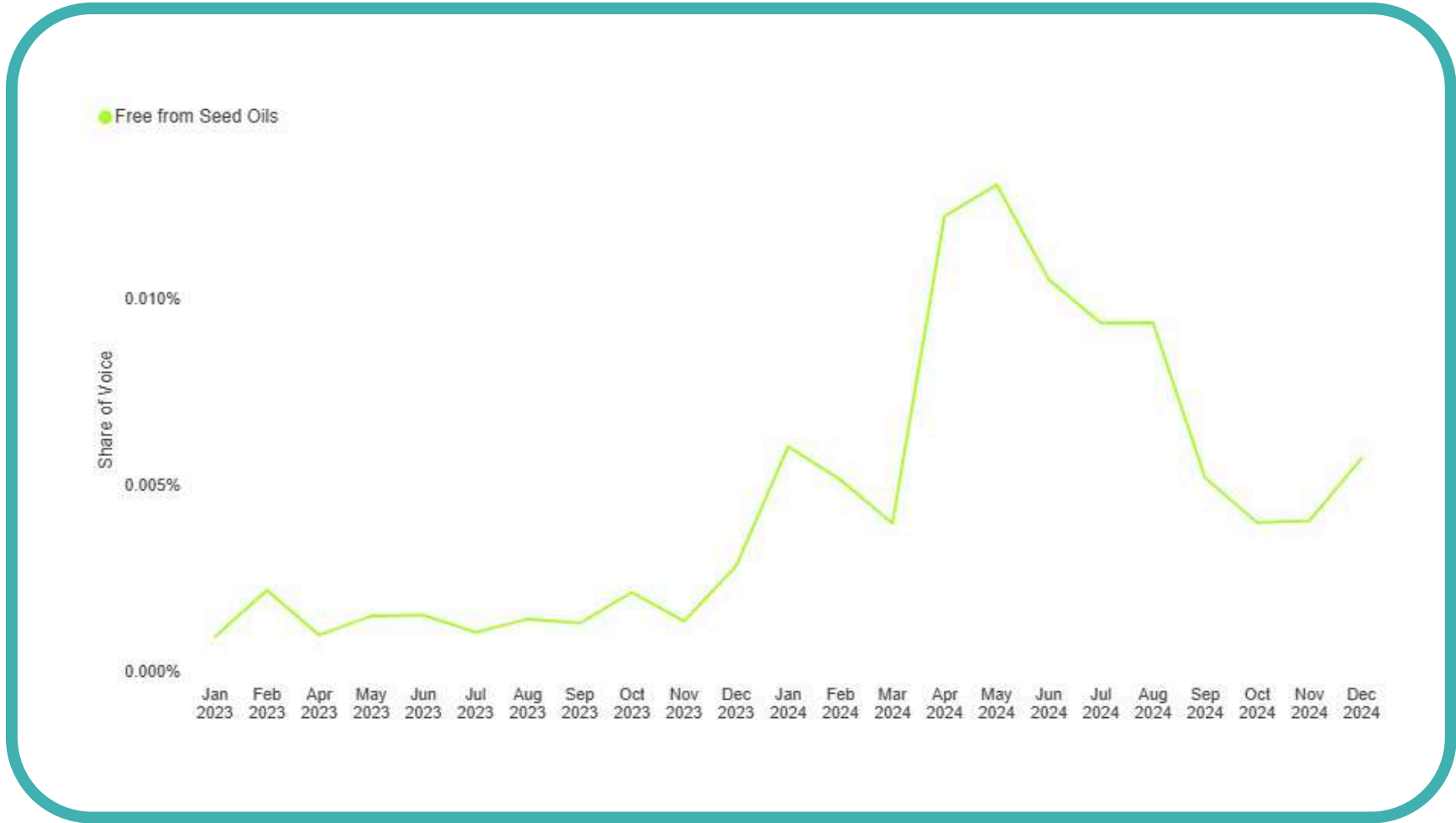
+390%
Growth
Rate

Creatine
1% SOV



WHAT ELSE ARE WE EXPLORING IN 2025

Free From Seed Oils



Added to the Q1 2025
Consumer Study



Beef Tallow - Alternative to Seed Oil and Skin Care



Dr. Josh Axe @drjoshaxe

It's a bad day for seed oils. ☀️ Keep raising your voices. They are finally starting to listen.

Steak 'N Shake Is Switching To Using 100% Beef Tallow In Its Kitchens

BY JULIA MULLANEY
JAN. 17, 2025 12:04 PM EST



23.7K 315 4,597

drjoshaxe Steak 'n Shake is leading... more

January 17

mary_schook Follow

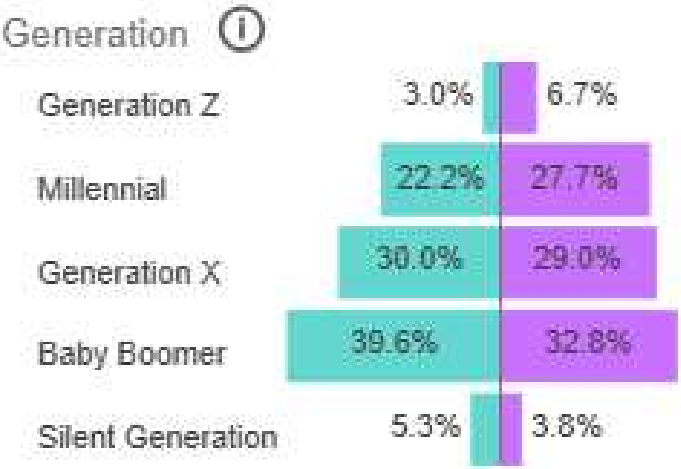
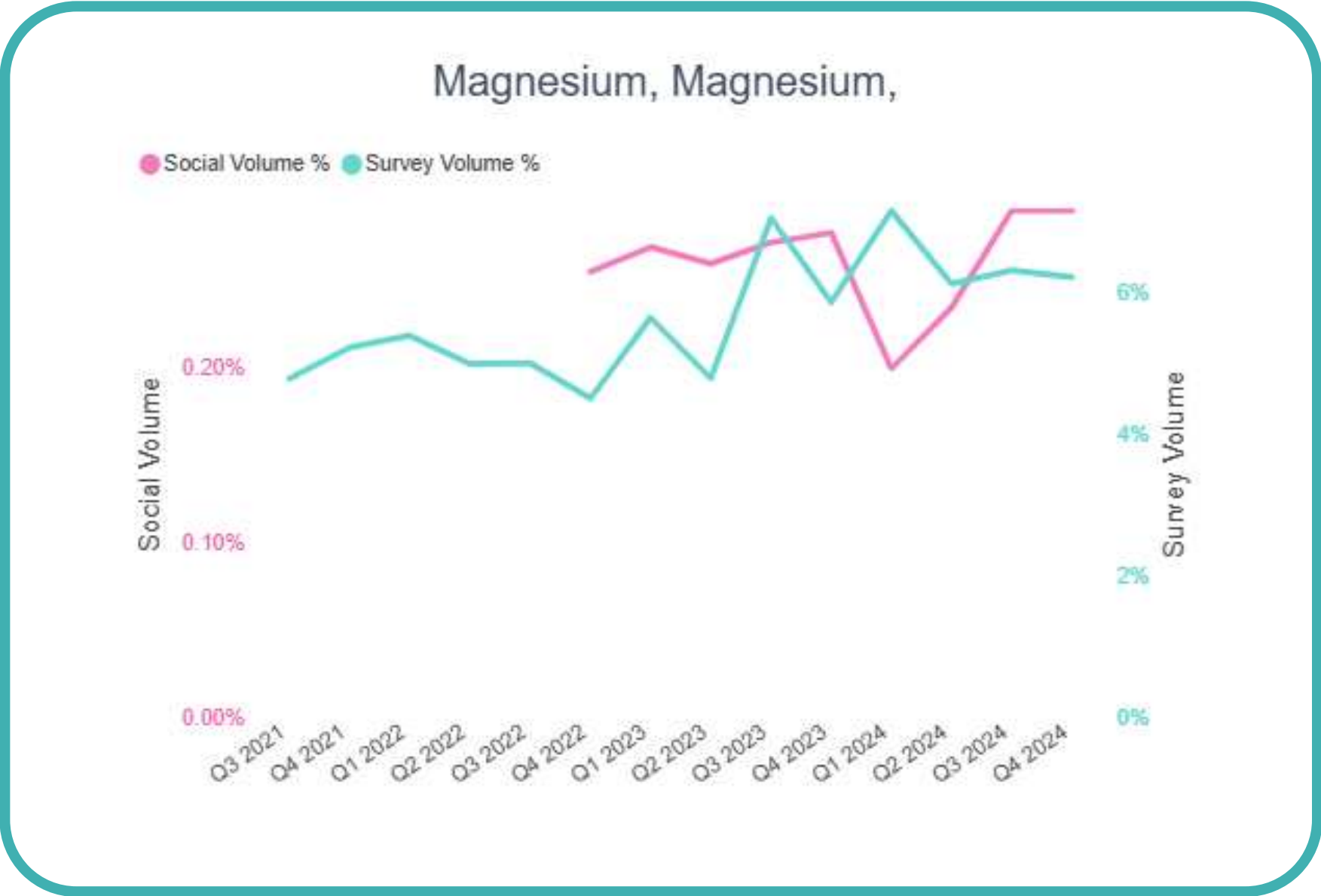
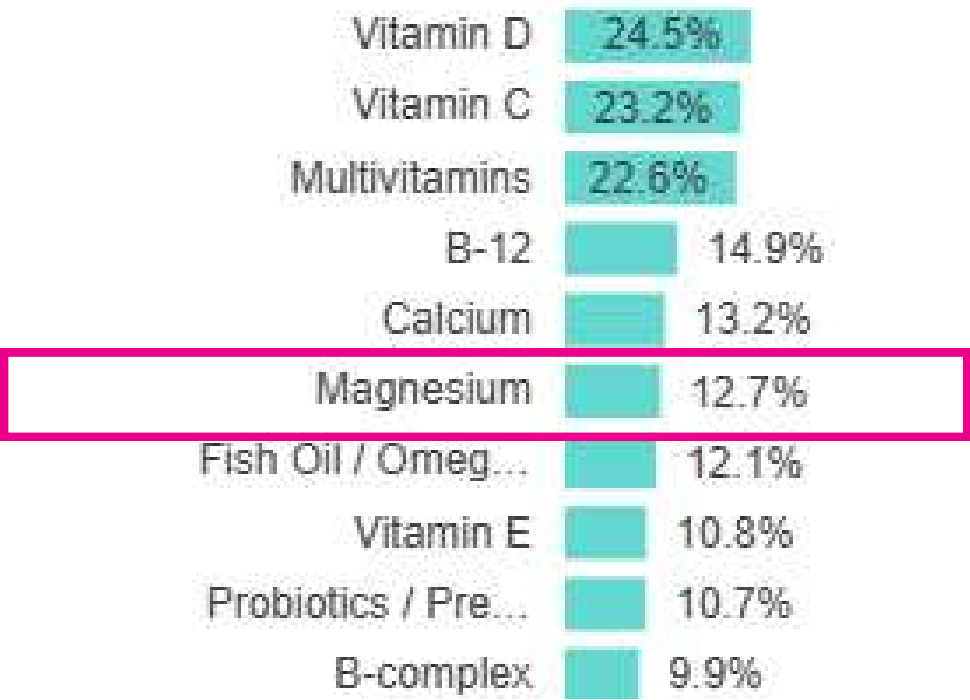
BEEF TALLOW SKINCARE?

134 33 27

mary_schook * Beef Tallow in... more

November 10, 2024

Magnesium continues to evolve and mainstream



Still skews Baby Boomer but opportunities to expand with Millennials and Gen X'ers. Gen X purchasers increased 1.2 PP YoY

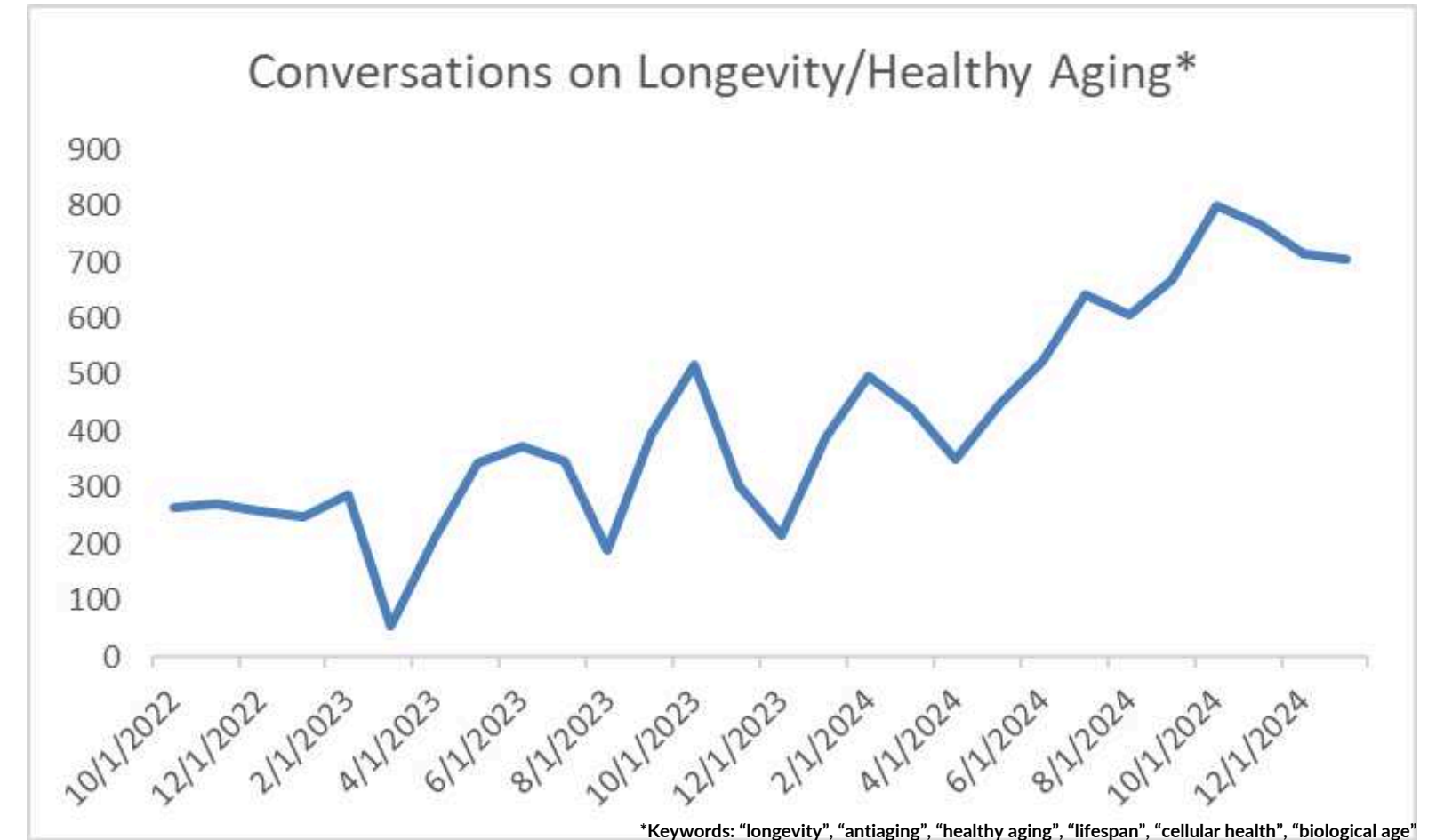
● Magnesium Purchasers
● General Population

Source: Brightfield Group; Wellness Consumer Insights & Social Listening; Dec 2024

Longevity and Healthy Aging

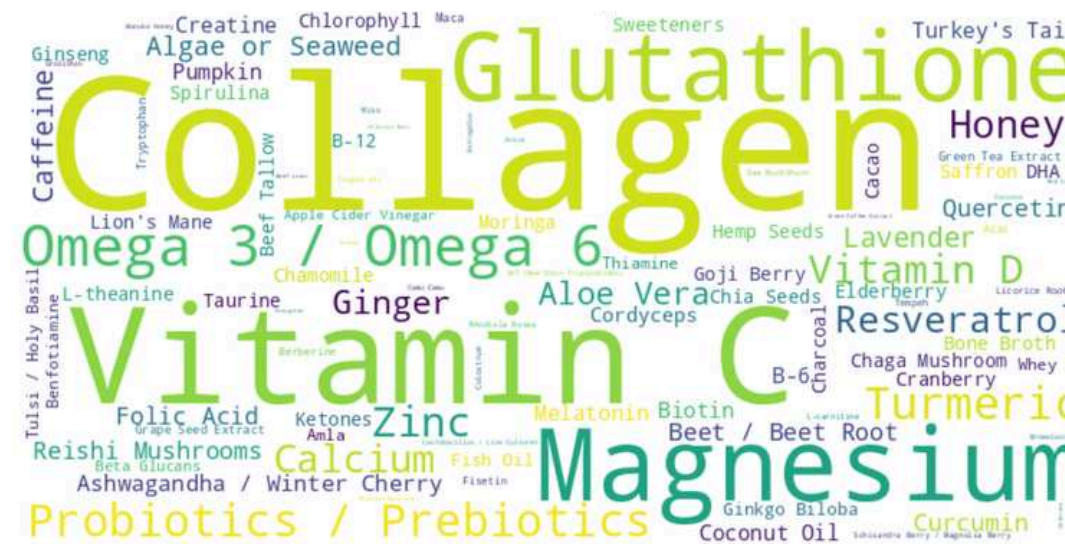
Top 3 Important Aspects When Thinking About Healthy Aging

- Live a long time
- Feel strong
- Look good for my age
- Live independently
- Avoid common health issues like diabetes, blood pressure or high cholesterol
- Minimal daily prescriptions
- Mobile on my own
- Active social life
- Sharp mind
- Great memory
- Minimal wrinkles
- Look healthy



*Keywords: “longevity”, “antiaging”, “healthy aging”, “lifespan”, “cellular health”, “biological age”

Longevity Ingredients in Social Media Mentions



Source: Brightfield Group Quarterly Wellness Survey & Social Listening Q4 2024

Any Questions?



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Explore Social Listening 



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