



PERIMENOPAUSE TRENDS: WOMEN'S WELLNESS UNLOCKED



August 2025

Gen Pop CPG Wellness Study
Perimenopause Deep Dive

Today's Presenters



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Co-founder of Femmar
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Brightfield Group
Director of Product

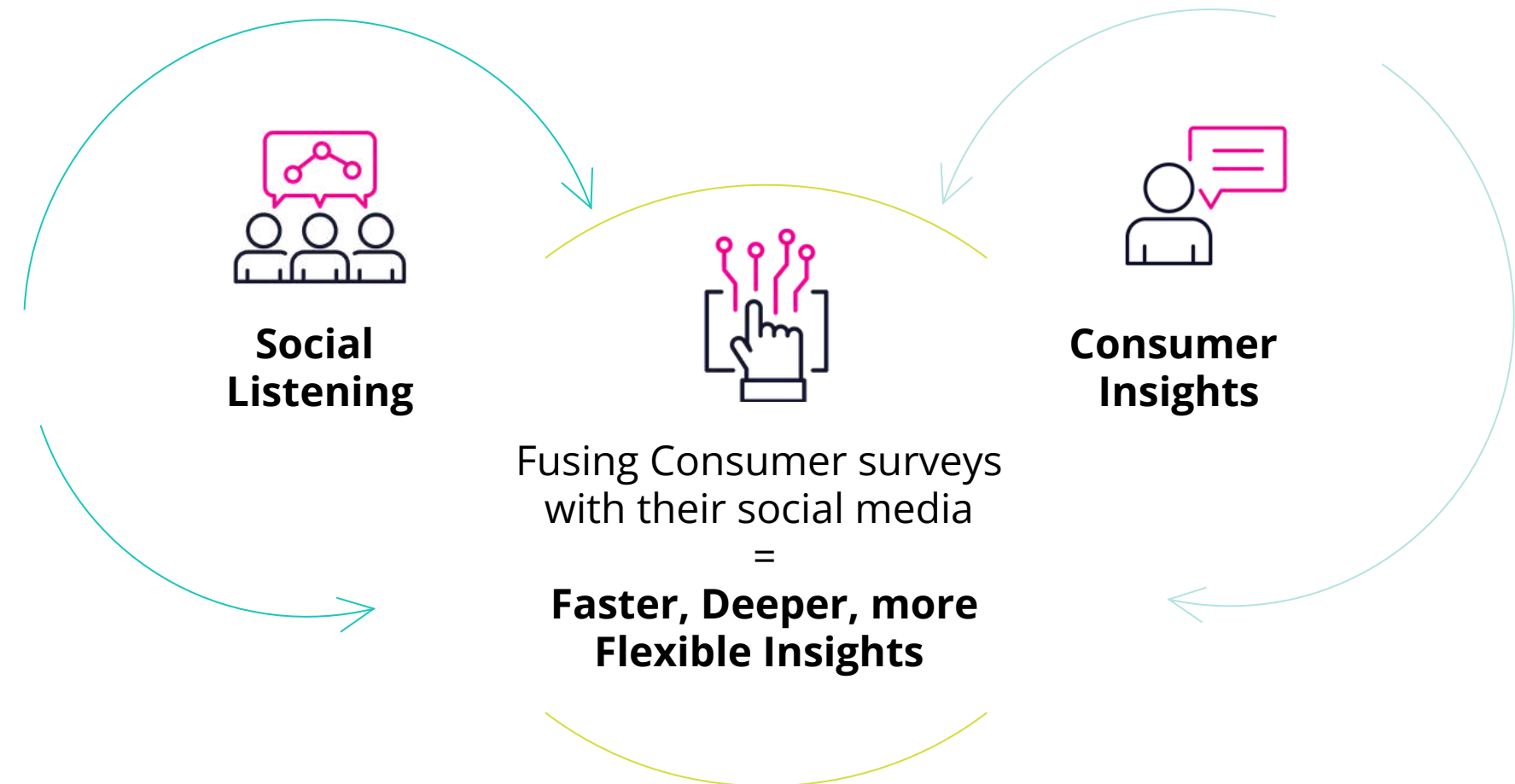
Background Methodology

WELLNESS CPG STUDY

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

AI-Powered Consumer & Social Listening Dashboards

Launched 2020 | Continuously Evolving



Consumer Insights Dashboard (AI-Integrated | Survey-Based)



Comprehensive Consumer Insights

- 80,000+ U.S. Adults surveyed since (5,000+ quarterly)
- Census-balanced and unique respondents each wave
- Rich attitudinal, behavioral & usage insights across 150+ categories
- Robust segmentation by wellness priorities, need states, and product drivers

Social Listening Dashboard (AI-Driven | Real-Time Contextual Intelligence)



Forward-Looking Social Listening

- 100M+ conversations across Twitter(X), Instagram, TikTok
- AI automates data capture, tagging, and real-time insight generation
- Covers: Conditions, Products, Ingredients, Claims, Need States, & Flavors
- Filter by predicted gender, age, and persona using trained AI models
- Clickable verbatims unlock full post context and sentiment nuance

CPG Wellness Survey: Women's Wellness Coverage

Available Now (Core Survey) | Released June 2025 (Deep Dive Expansion)



Included in Core Survey since Q3 2023

Hormonal Stages Tracking

(Ability to segment by Pre, Peri, and Post-menopausal)

Product Behaviors



- Usage across food, beverage, and supplement categories
- Nutrition habits, attitudes & preferences
- Functional need states



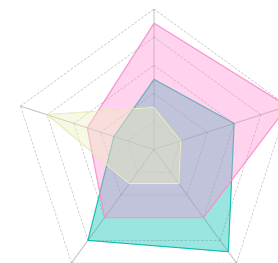
Psychology and Segmentation

- Psychographic profiles
- Wellness & lifestyle personas



Health and Well-being

- Stressors and coping tactics
- Exercise and hobby behaviors
- Personal health conditions



Now live! Q2 2025

Perimenopause Expansion Module

Deep dive questions on perimenopause amongst 35-55 year-old women (N=649, those who identify as "yes" or "maybe" in perimenopause N=280)

Understanding & Awareness



- Self-identification as peri/post-menopausal
- Symptom recognition
- Perceived knowledge level

Experience & Support



- Conversations with healthcare providers
- Support Methods Tried
- Impact on daily life

Information & Product Interest



- Information sources consulted
- Interest in product formats or ingredients

New Data Available
June 2025 onward



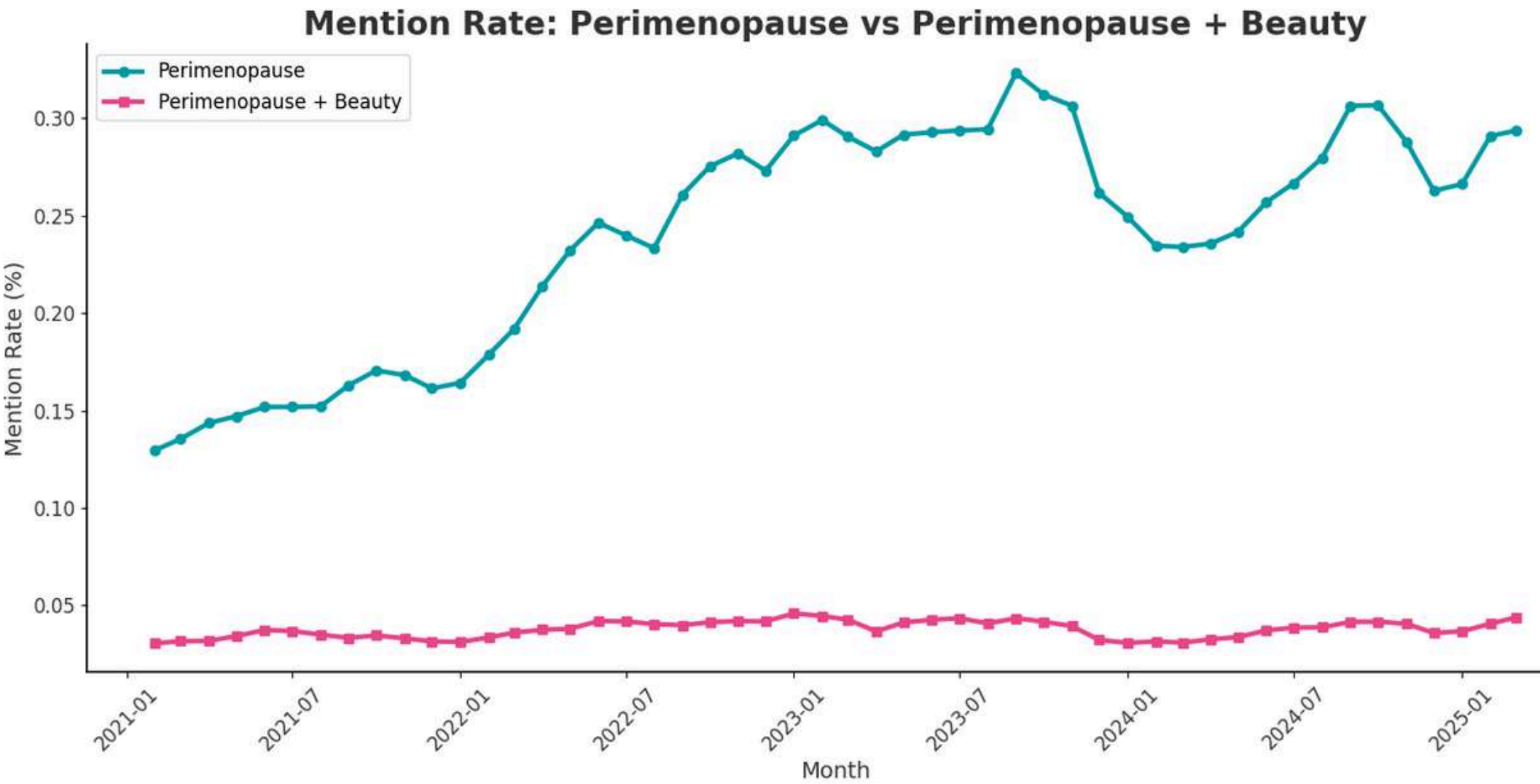
Ongoing Conversation Tracking Since 2020

Brightfield Group has continuously tracked online conversations around women’s health since 2020. This dataset supports segmentation across key wellness dimensions:

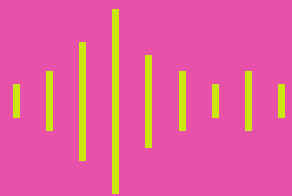
Segmental Dimensions

- Expanded w/20+ Perimenopause Symptoms included
- Products
- Ingredients
- Conditions
- Need States
- Flavors
- Claims

Example Use Case:
Explore overlapping conversations between beauty and perimenopause to uncover trending ingredients and product opportunities.



Social Listening Insights | 2020-2025



71.8 M Social Posts captured from Instagram TikTok, and X (refreshed daily)



- 5M+ women’s health mentions
 - 231K perimenopause related mentions
- Pulled from 71.8M total posts across Instagram TikTok and X*



Brightfield Group Consumer and Social Listening Study: Perimenopause Deep Dive

The Stages of Menopause



Perimenopause

Age Range: mid 30's to early 50's

Estimated U.S. Population: 42.3M (35-54)

Duration: on average, 7 years in the U.S.,
can last up to 14 years

Symptoms: erratic and intense, with hormones
fluctuating and unpredictable

Fertility: declines rapidly

Menopause

Age Range: 51 on average in the U.S.

Duration: 1 Day

Marks 12 months with no period

Symptoms: mild to intense leading
up to this milestone

Fertility: official end

Post-Menopause

Age Range: early-to mid-50's

Estimated U.S. Population: 53.2M+ (55+)

Duration: Remainder of life

Symptoms: mild to persistent and late-onset +
long-term health risks, with
hormone levels consistently low

Perimenopause Is the New Front Line of Women's Health

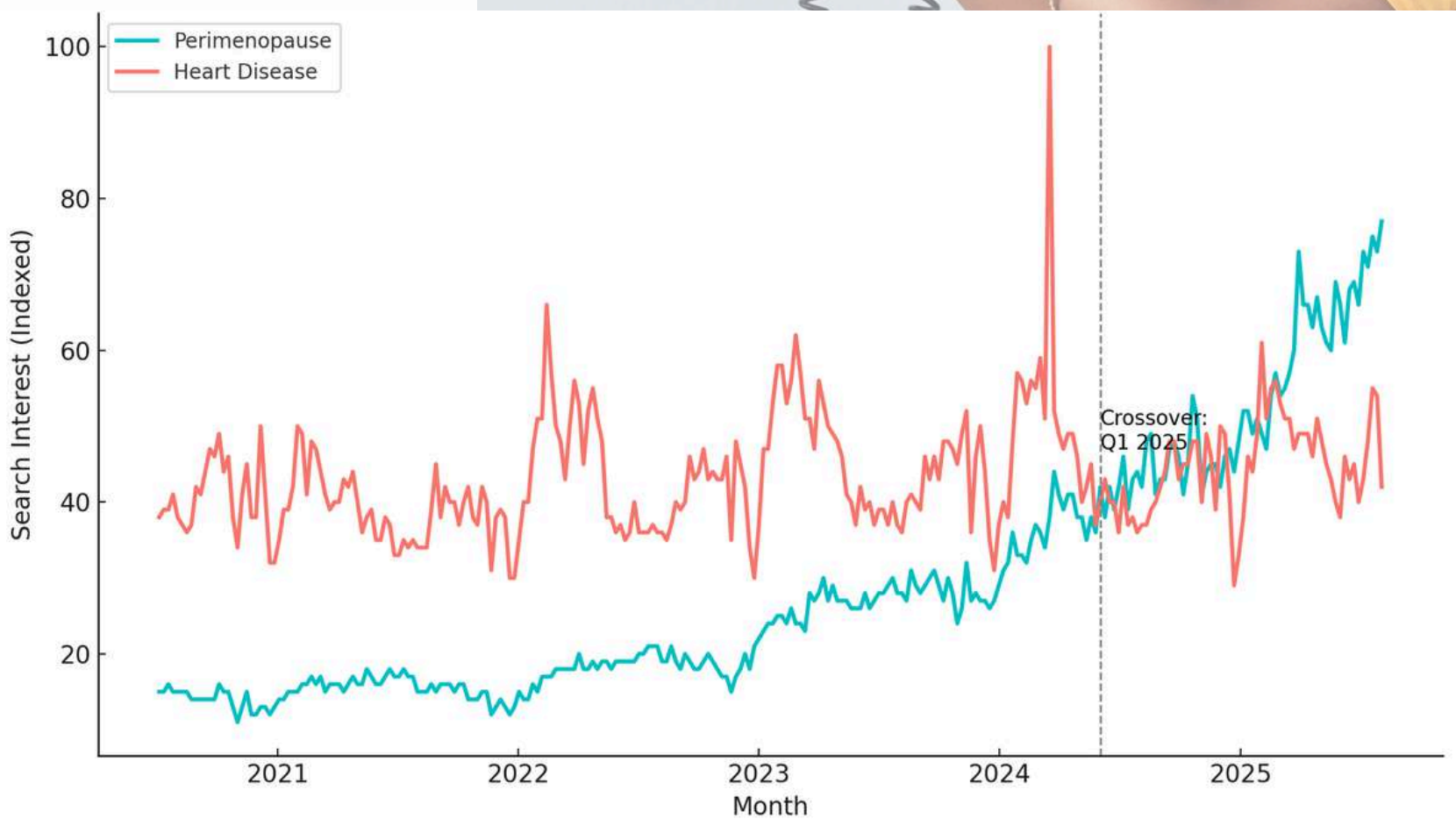
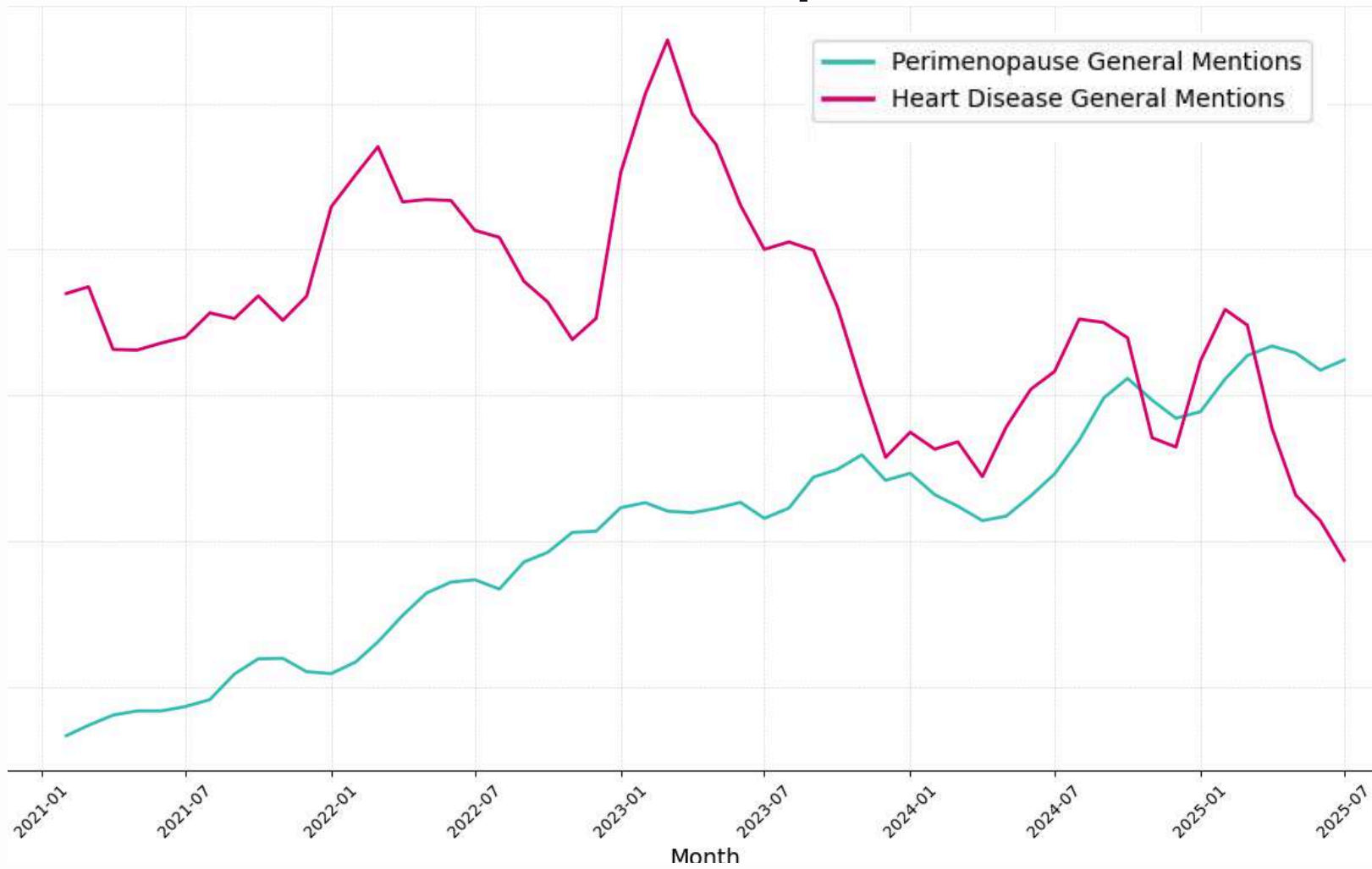
Perimenopause Surpasses Heart Disease in Cultural Relevance

Search interest in **perimenopause** has now surpassed **heart disease**, marking a cultural shift toward recognizing this long-overlooked life stage. This crossover appeared in late 2024 and early 2025 in both Google Trends and Brightfield's social listening across TikTok, Instagram, and Twitter.

Women are increasingly seeking answers online instead of from doctors. As searches and social conversations rise, a **\$10B opportunity** is emerging for wellness brands ready to meet this growing demand.



Social Media Mentions - Perimenopause vs. Heart Disease



Google Trends - Perimenopause vs. Heart Disease

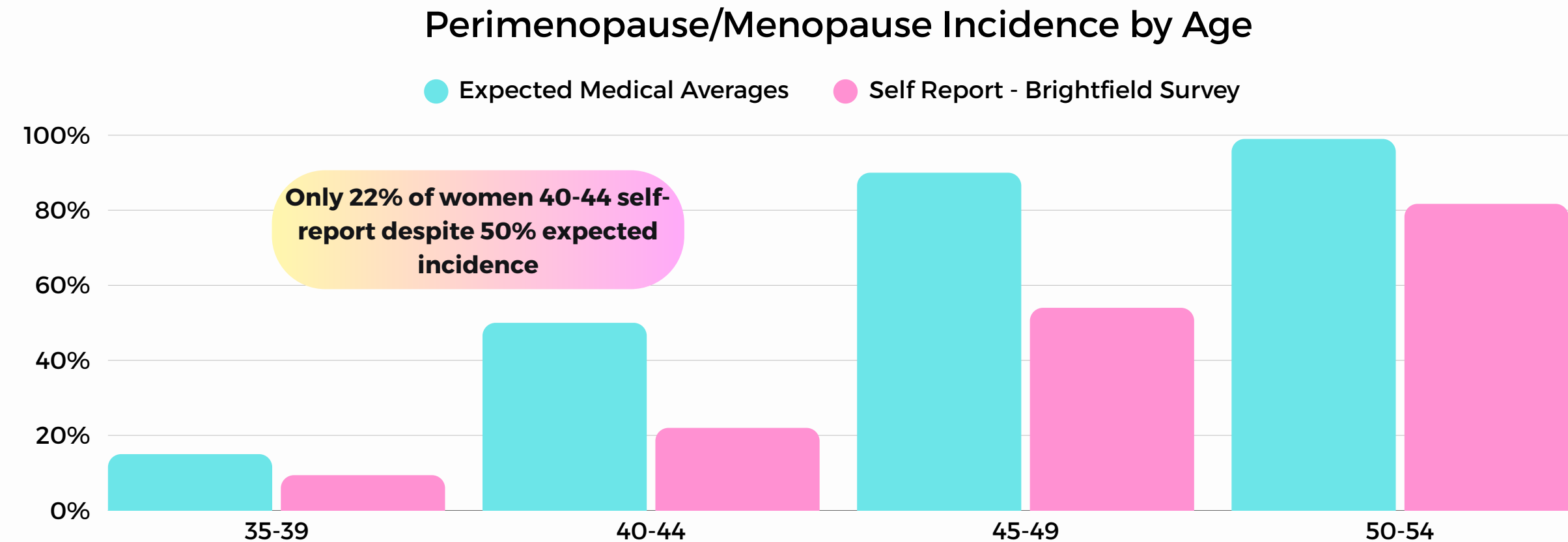
Source: Brightfield Group; U.S. Wellness Social Listening; July 2025

Awareness Gap: Many Women Miss the Signs of Perimenopause



While awareness is growing, many women still do not realize they are in perimenopause. Medical data shows **over half of women ages 40 to 44** are in this stage, yet **only 22 percent recognize it**. Even among women ages 45 to 49, symptoms like sleep issues, mood swings, and fatigue are common but often not linked to hormonal changes. This gap reflects more than a lack of information – it speaks to **deeper issues of confusion, invisibility, and shame**.

For wellness brands, this is a critical moment to name what is happening, validate experiences, and give voice to millions of women who have yet to find the words.



Source: Brightfield Group; Wellness Consumer Insights; Q2 2025

Medical averages from SWAN Study, ACOG (American College of Obstetricians and Gynecologists), Mayo clinic



At the Heart of Women's Health: Help

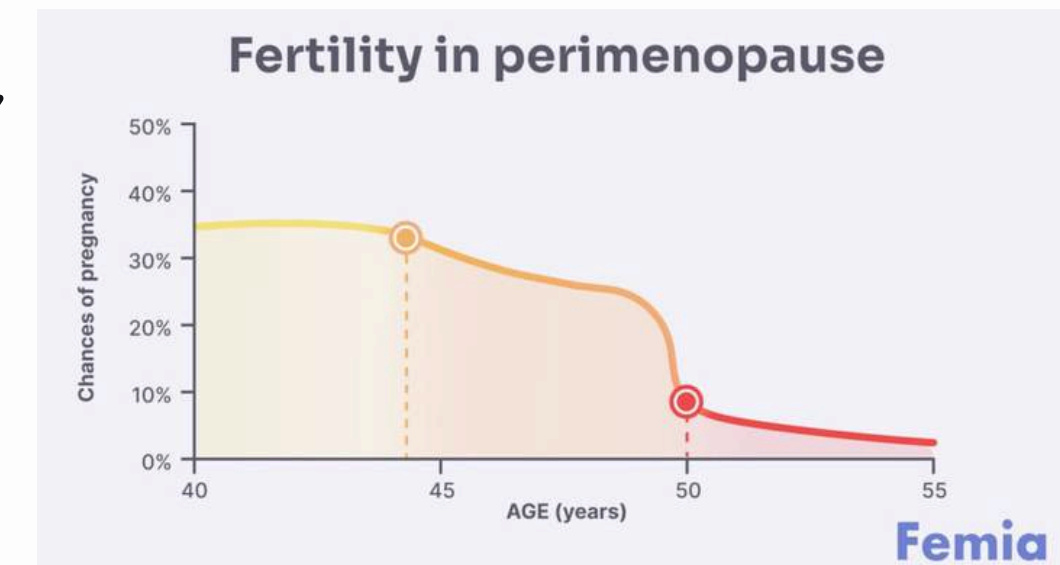
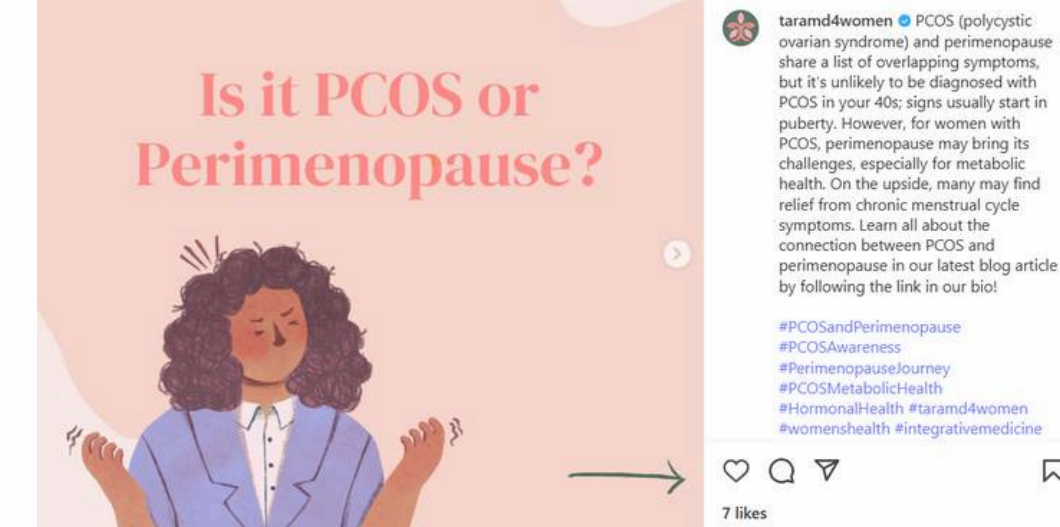
Since 2020, **women's health** has made up just **2 percent of nearly 100 million wellness conversations**, but **it is growing quickly**. **Emotional overwhelm** dominates the dialogue, with these types of phrases in almost **two-thirds of posts**.

The fastest-rising topics are **beauty**, **hormonal health**, and **glucose balance**. No matter the stage, one word rises above all: **help**. Women are asking for and sharing support — practical, emotional, and hormonal.

Glucose Balance 474% YoY

Hormonal Balance 129% YoY

Beauty and Women's Health Growing 44% YoY



Perimenopausal and menopausal women deal with a lot of issues compared to other women

Over-indexing self-reported health conditions by women's hormonal stages



Fertility

Over-indexing Conditions:

Acne, ADHD, Crohn's, Dysphagia, Celiac disease /
Gluten sensitivity, Nut Allergy



Perimenopause

Over-indexing Conditions:

Endometriosis, Insulin Resistance, Digestive
Condition, Lactose Intolerant / Allergic to Dairy,
Migraines, PMS/women's health, Severe/chronic
pain, Post-Traumatic Stress Disorder (PTSD), Nausea,
Eczema / Psoriasis, Insomnia, Fibromyalgia, Obesity,
Depression, Anxiety



Post Menopause

Over-indexing Conditions:

High Cholesterol, Cancer, Heart disease /
Cardiovascular disease, Hypertension, Glaucoma,
Arthritis, Diabetes, Fibromyalgia, Joint Pain /,
Inflammation, Spinal Cord Disease, Digestive
Condition, Severe/chronic pain, Overweight

In the Brightfield Group Gen Pop study, women experiencing Perimenopause over-indexed with 16+ self-reported overall Health Conditions compared to other women

Perimenopausal women face more diverse health and wellness challenges than other women, ranging from physical to mental health.



Medical Conditions

Over-indexing Conditions:

- **PMS/Women's Health** (+514.6)
- **PCOS** (+376.4)
- **Dysphagia** (+361.7)
- **Epilepsy** (+300.6)
- **Endometriosis** (+252.4)



Health Issues (Weekly+)

Over-indexing Issues:

- **Brain Fog** (+152.6)
- **Trouble Concentrating** (+152.5)
- **Stomach Ache** (+146.3)
- **Stress/Anxiety** (+144.3)
- **Forgetfulness** (+143.7)



Psychographics

Over-indexing Statements:

- **Staying focused is difficult** (+128.8)
- **I often feel tired and sluggish** (+124.1)
- **Often anxious/stressed out** (+123.4)
- **I often feel lonely** (+122.4)
- **Prefer alternative medicine** (+122.0)

Hormonal Balance is a Central Driver of Emerging Wellness Conversations

Conversations about **hormonal balance** have jumped **129 percent year over year**, with similar surges in **glucose balance** and **metabolism support**. These topics may seem unrelated, but for women in perimenopause they often connect back to **hormonal shifts**. The **simultaneous rise** creates an **opportunity**. Brands that can help women **connect the dots** with education and solutions have the chance to lead — and win — in this space.

Social Media Mentions – Hormonal Balance



Source: Brightfield Group; U.S. Wellness Social Listening; July 2025

Social Media Mentions – Glucose Balance



Social Media Mentions – Metabolism Support



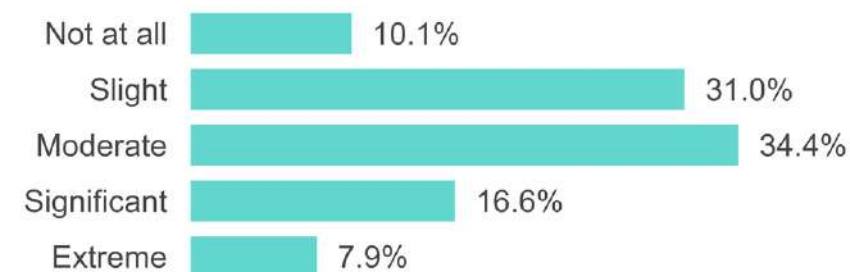


What Are Women Experiencing?

In our Q2 2025 Wellness CPG survey, women aged 35–55 who said “yes” or “maybe” to being in perimenopause most often identified hot flashes (44 percent) and irregular periods (42 percent) as defining signs, followed by mood swings and night sweats. More than half said it impacts their daily life moderately to extremely, while only 10 percent reported no impact. Two-thirds of women self-identify their perimenopause compared to one-third with a medical diagnosis, underscoring how many feel they are navigating this on their own.

Q2 2025 Perimenopause Module Brightfield Group CPG Wellness Survey

Perimenopause Impact

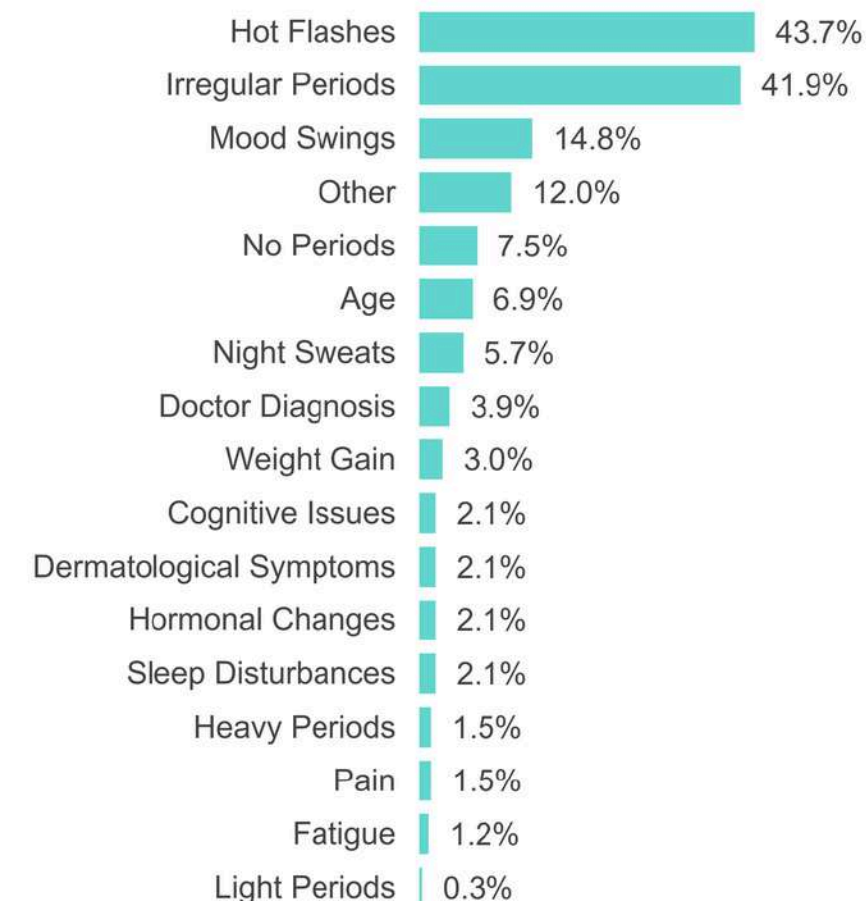


Perimenopause Diagnosis

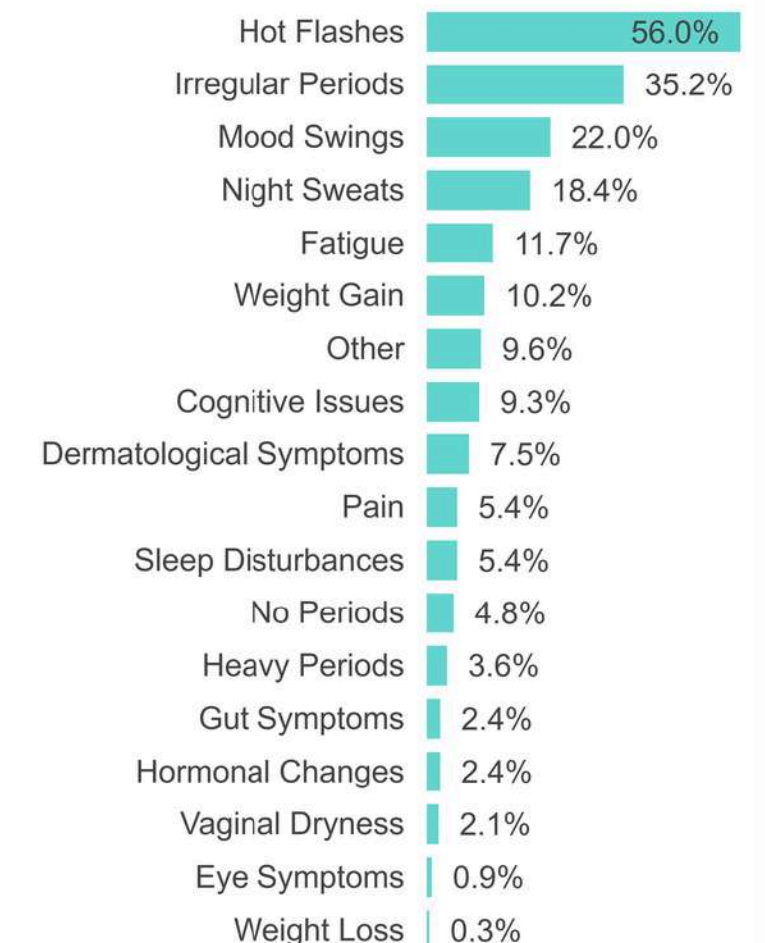
67.6%
Self-Identify

32.4%
Diagnosed by
Health
Professional

Defining Factor



Perimenopause Symptoms



Female workers are estimated to spend over \$17 billion annually on treating their menopause symptoms

\$10B

Non-Medical Treatments

\$4.5B

Healthcare Co-Pays

\$2.7B

Medical Hormone Therapies

Nearly 70% of women are taking steps to manage perimenopause.

Vitamins and Supplements Top the List of Products of Interest to Support Perimenopause

Question: Which of the following products would you be interested in if it said it would help you with Perimenopause? (Choose your top 3)



42.7% Vitamins & Supplements



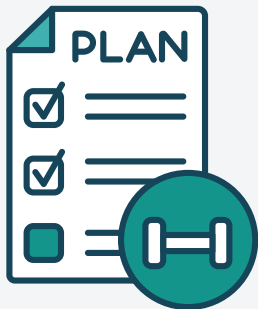
19.7% Meal Plans



19.3% OTC Medicine



19.7% Therapeutic Products



17.5% Fitness Plans



16.2% Beverages



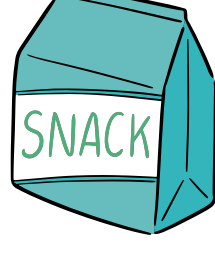
14.2% Sexual Wellness Products



13.8% Mindfulness Tools



13.3% Health Tracking Apps



13.3% Snacks/Bars



10.5% Wearable Biomeric Trackers



9.2% Topical Skincare



7.4% Fitness Products

Expo West Recap: Products for Women’s Health were on display.

Needs ranged from Perimenopause support, PMS symptom relief, hormone balancing, and libido boosting



In social conversations about “Conditions”, women’s health conditions like Endometriosis, PMS and Perimenopause all showed growth over the past year.

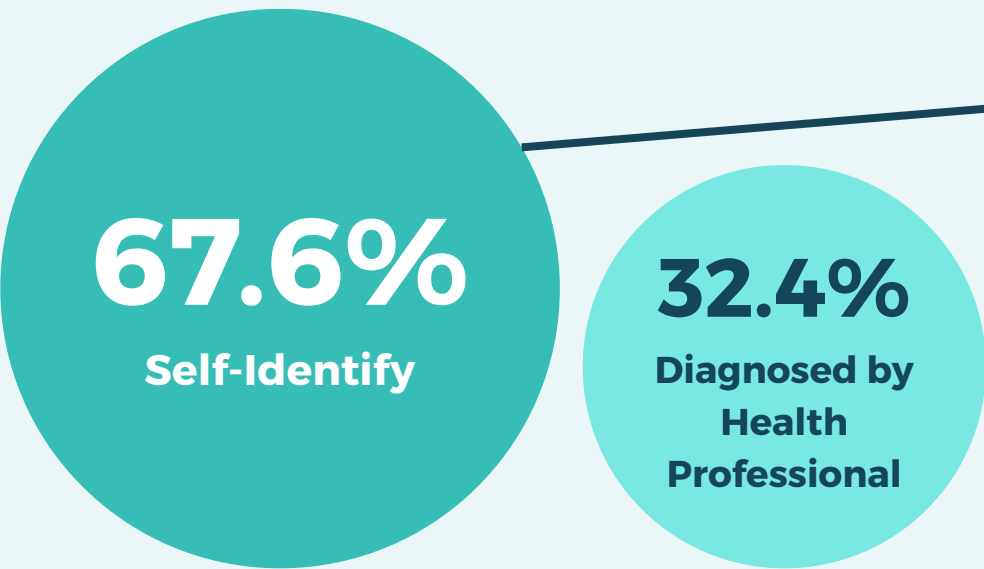
At 5% Share of Voice (SOV), Perimenopause is on par with mentions of Obesity.



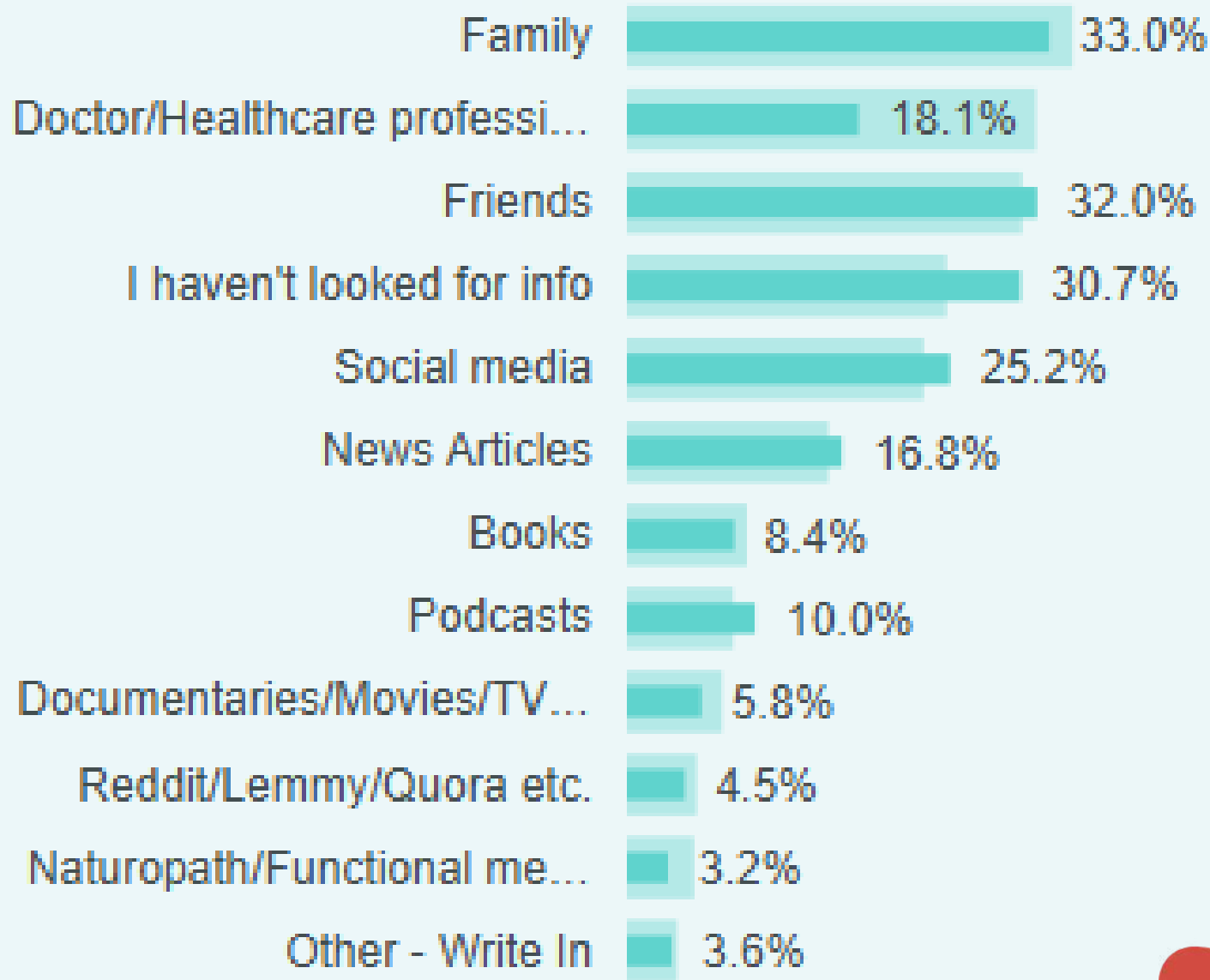
Source: Brightfield Group; Wellness Social Listening & Quarterly Survey; March 2025

Women who self-diagnosed as being in perimenopause were more likely to lean on family, friends, social media, and news articles for information, but many have not sought information at all

Perimenopause Diagnosis

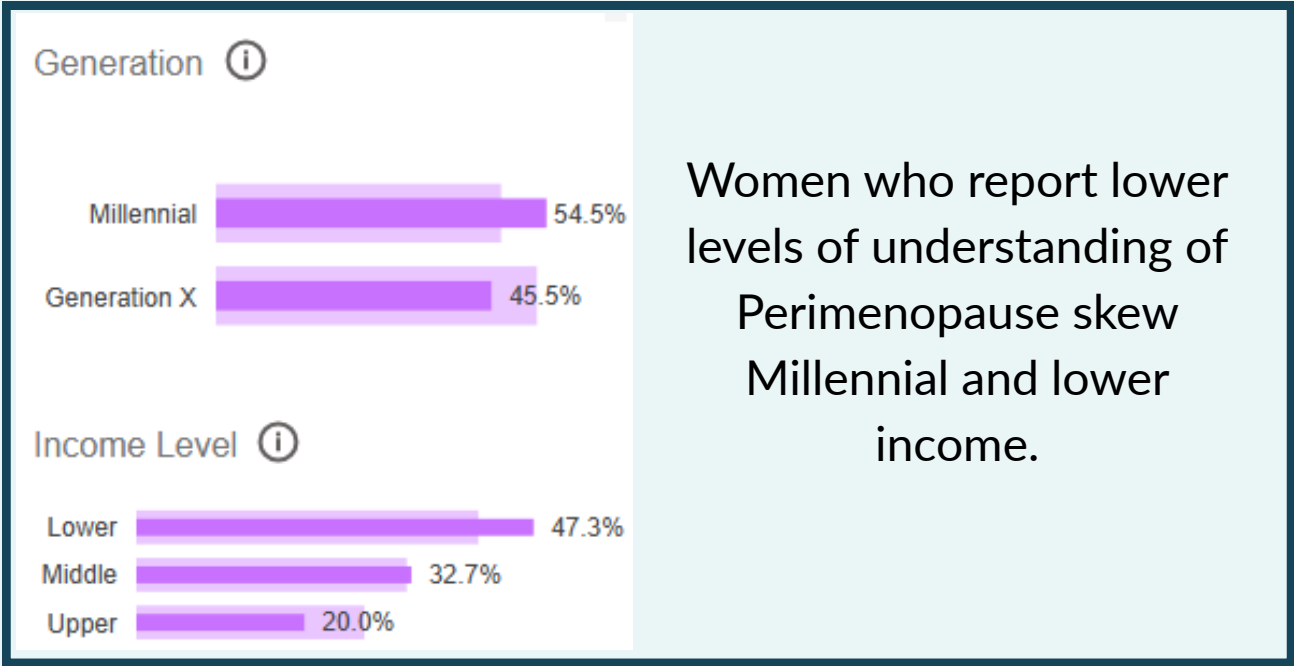
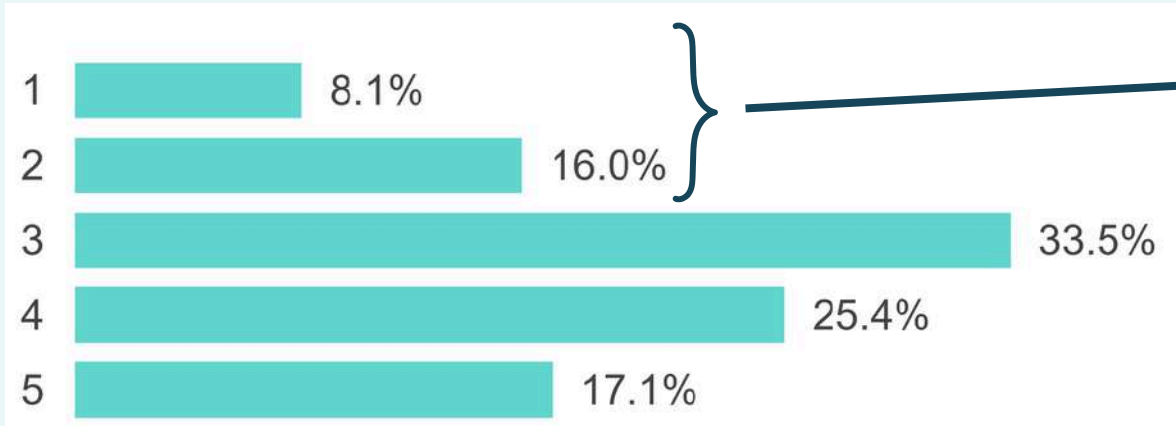


Info Sources ⓘ



Understanding is lacking, especially among millennial women who are probably just entering this phase of their lives

Perimenopause Understanding Rating



In Q4 2024 we reported on trending social ingredients within Perimenopause

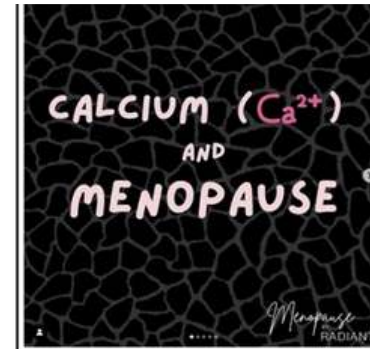
Established Trend

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



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.



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



Dec 2024

Aug 2025

Collagen
13% SOV

Magnesium
11.9% SOV

Collagen
11.2% SOV

Probiotics/Prebiotics
7% SOV

Probiotics/Prebiotics
7% SOV

Calcium
11% SOV

Vitamin D
9% SOV

Dec 2024

Aug 2025

Magnesium
6% SOV

Peptides
7.74% SOV
(1081.6% GR)

Electrolytes 1.35% SOV
(210% GR)

Calcium
6% SOV

Vitamin D
6% SOV

Ashwagandha 3.5% SOV
357% GR

Creatine 2% SOV
251% GR

Dec 2024

Aug 2025

Glutathione
.62% SOV

Glutathione
.82% SOV +decline

NAD
1.2% SOV
724% GR

Ashwagandha
1.6% SOV

Lion's Mane
1.41% SOV
80.0% GR

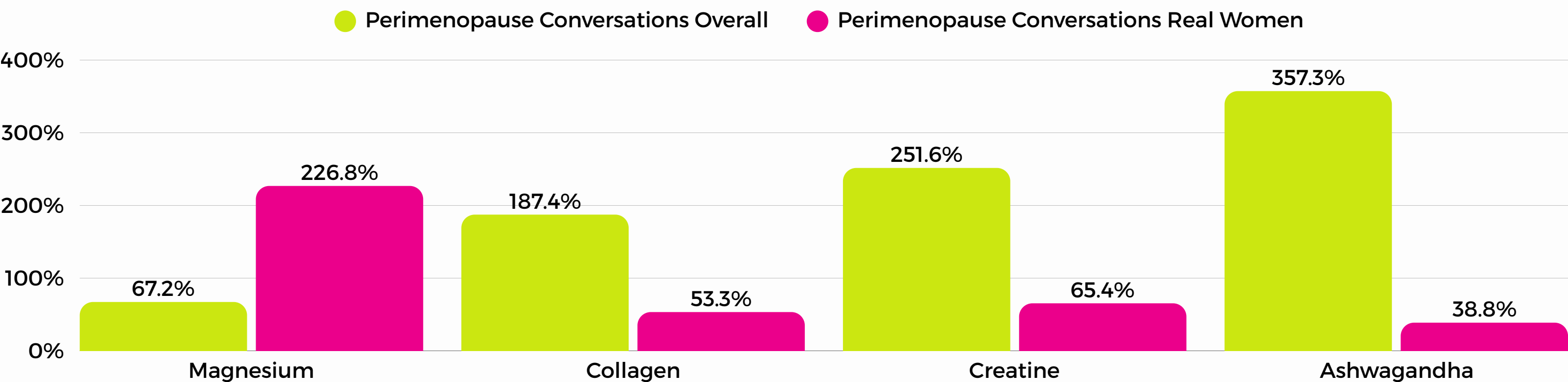
Creatine
1% SOV

Conversations Analysis: Looking at posts from real women vs brand posts shows that more established ingredients like Magnesium tend to have more real women in the conversation.

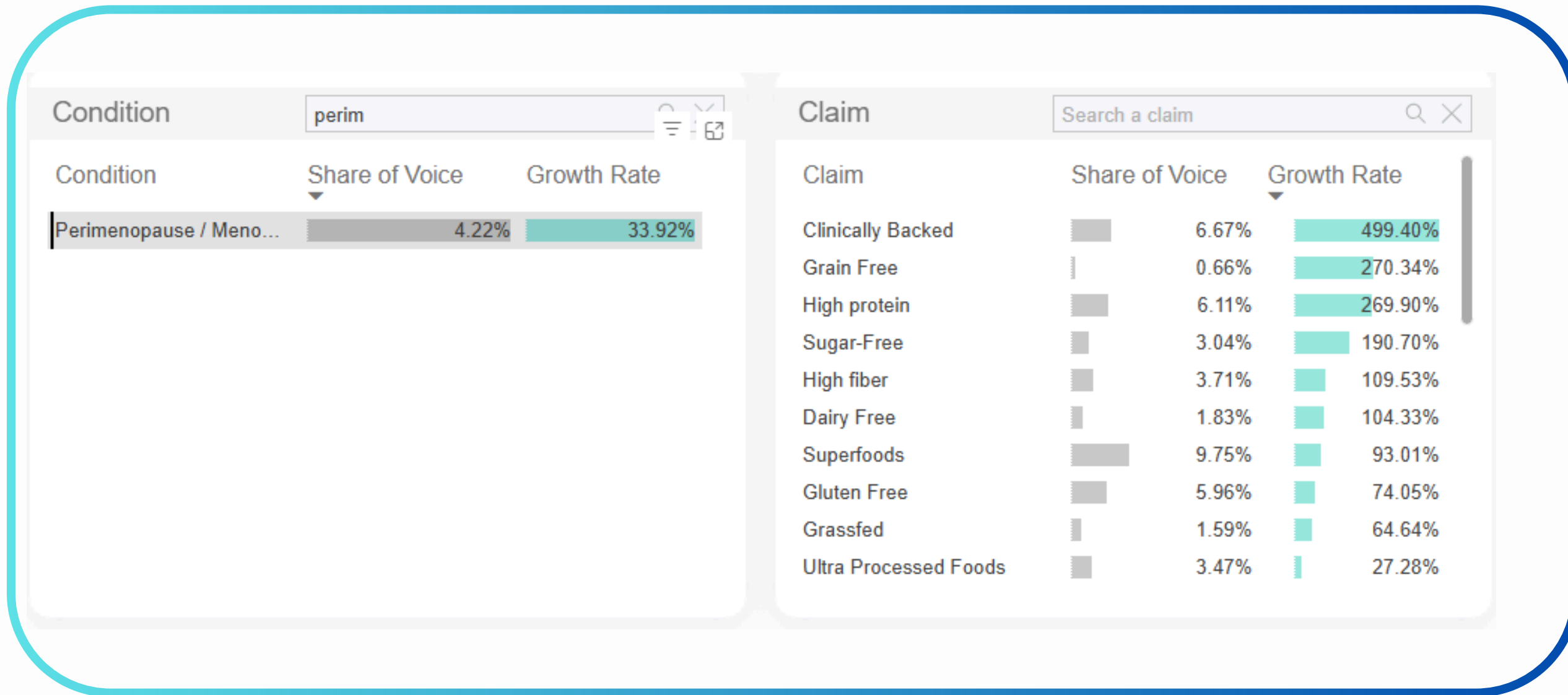
To better understand positioning, we further dissected the conversation around these ingredients + Perimenopause and segmented by whether posts were coming from overall conversations, or, from real women (not brands).

More established and science-backed ingredients like Magnesium have more real people talking about them, while Ashwagandha shows that more brands are posting, indicating real people may need to catch on still, or the trend needs to be proven out. Creatine, however showed stronger growth in real women, which may signal to promote/innovate in creatine now that it is catching on with real women.

Ingredient Growth Across Social



Trust is paramount - with more conversations seeking Clinically-Backed claims





**Building Strength &
Preventive Health**

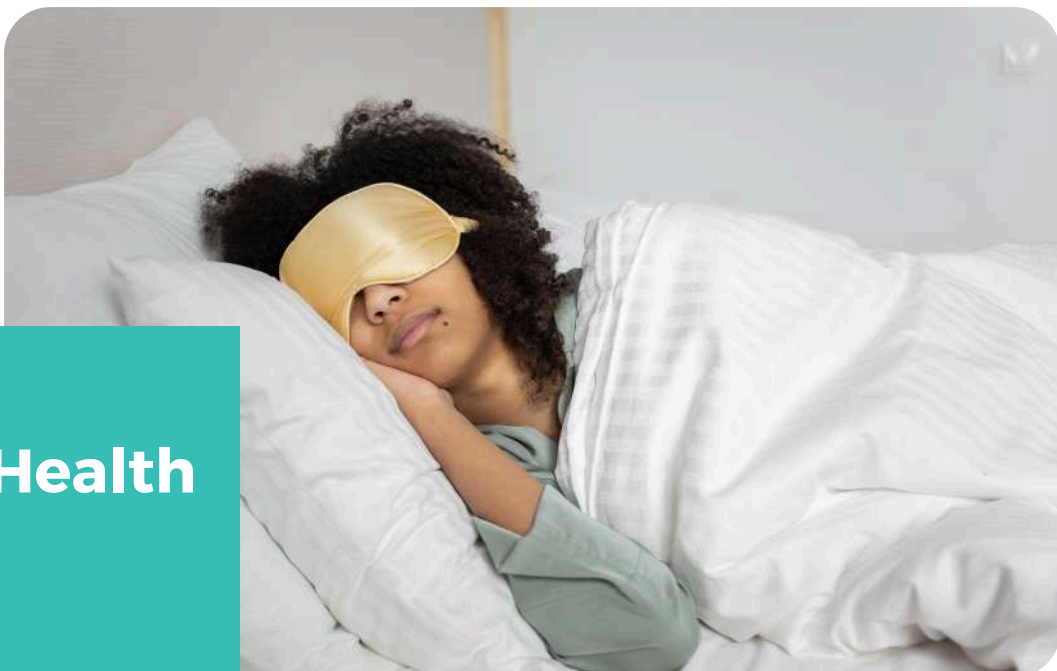


**Holistic and Natural
Wellness Rituals**

4 Trends in Women's Wellness

What Social Data Reveals About the New Perimenopause Playbook

Forget hush-hush suffering. This phase is going mainstream, tech-savvy, and unapologetically motivated to feel and look like themselves.



Focus on Mental Health



**Digital Health and
Femtech for Women's
Wellness**

Strength: The New Cornerstone of Women's Longevity

Bone power, muscle preservation, and resilience are replacing the scale as the markers of women's health.

Strength and **protein** are at the heart of this shift — fueling a **mature, accelerating trend** in women's wellness. **High protein** has consistently ranked as a top trend for two years, and within perimenopause conversations its growth is even more pronounced, up **46% year over year**. And as **protein and performance trends rise, bone health is becoming a critical part of the strength story.**

Creatine is up **445%** and **peptides 287%**, with rising interest in **bone health** driving buzz around **vitamin K, NAD, and bone broth**. From **protein sparkling waters** to **creatine stacks** and **weighted vests**, innovation is meeting the demand for **bone strength, muscle preservation, and longevity.**



Protein and performance have redefined the perimenopause aisle

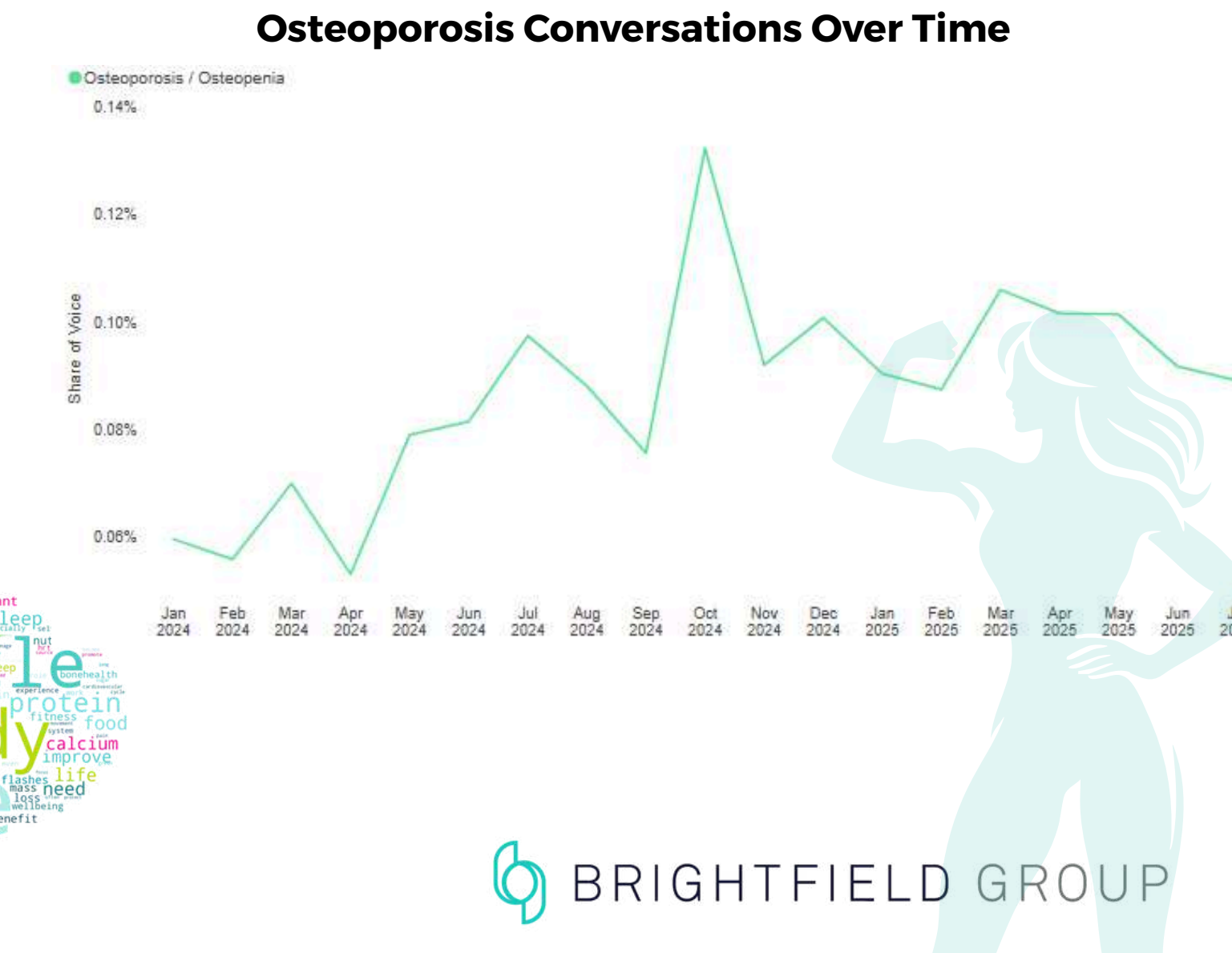
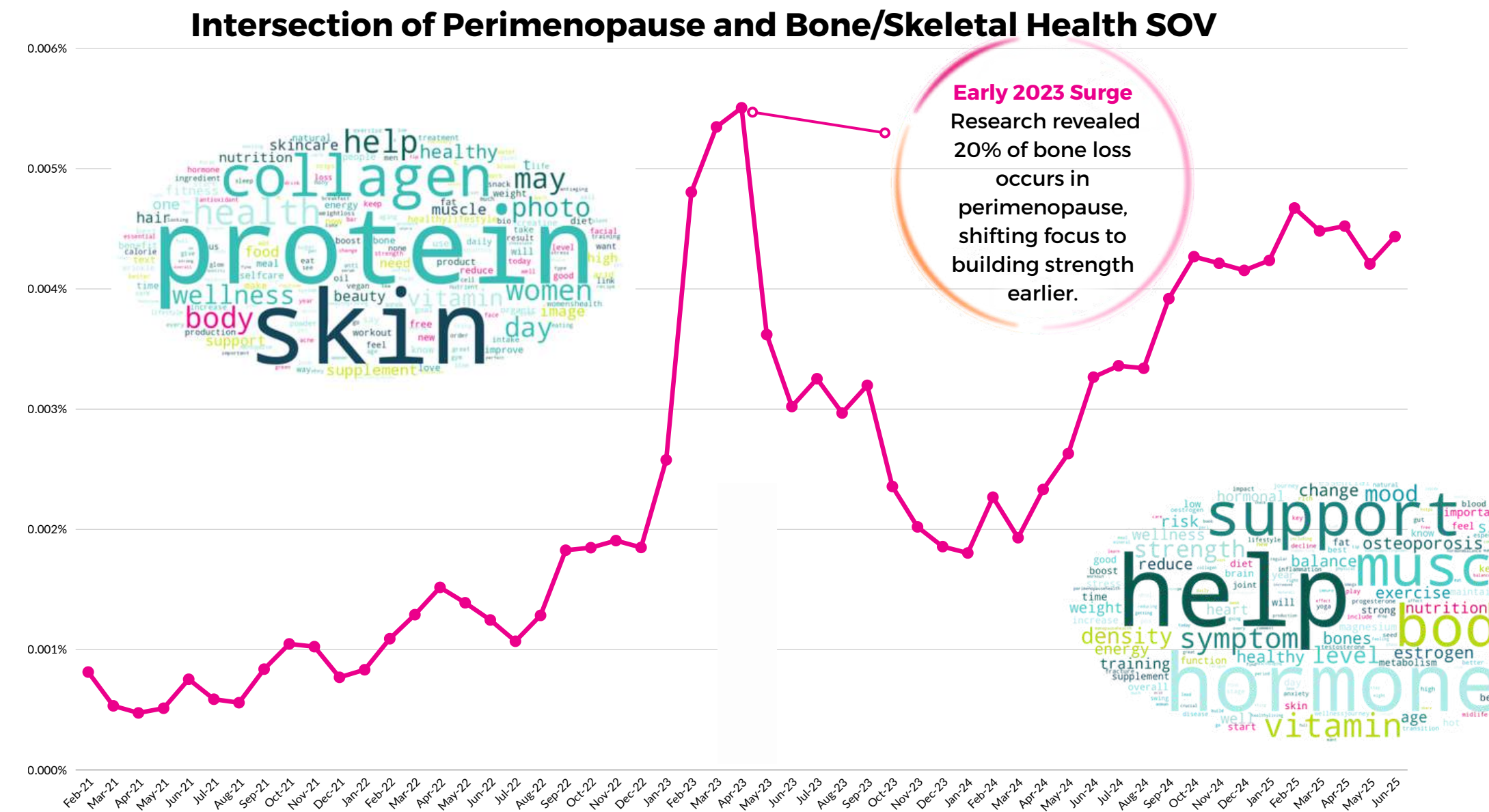
- **High protein** is the top-growing claim (+46% YoY) within Perimenopause conversations
- **Bone health** now appears in 3% of perimenopause-related posts, up **74% YoY**
- **Creatine (+445%)** and **Peptides (+287%)** are top growing ingredients
- **Vitamin K (+31%)** and **Bone Broth (+43%)** are also climbing

From Trend to Pillar: Bone Health and Strength in Perimenopause

The conversation has shifted from “later-life prevention” to building strength earlier – now anchored in performance, capability, and longevity.

Bone health in perimenopause is gaining new urgency alongside the rise of strength and protein. In late 2022 and early 2023, social mentions spiked, driven by research showing that 20% of lifetime bone loss occurs during perimenopause as estrogen declines.

This shifted the conversation from preventing frailty later in life to actively building and protecting strength earlier. By 2024 and 2025, the topic had moved beyond clinical circles into culture, with sustained growth focused on longevity, capability, and daily action.



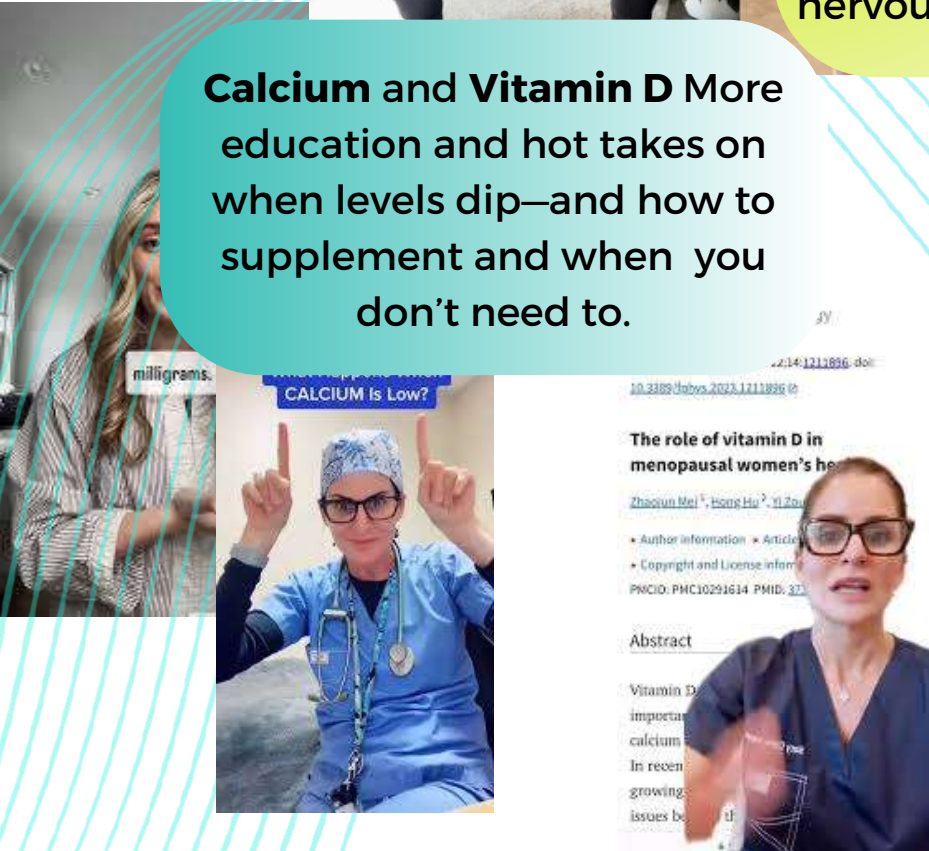
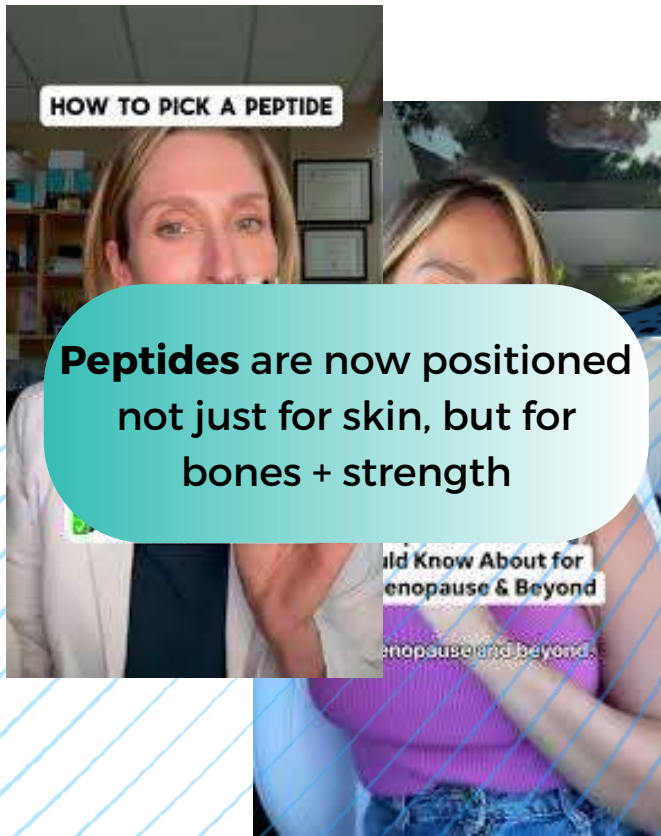
Themes within Bone Health and perimenopause posts include...

Bone health is moving from “later-life concern” to an everyday strength ritual.

From weighted vest walks and vibration plates to creatine, protein, and collagen peptides now linked to bone strength, women are building bone health into daily routines. Conversations on calcium and vitamin D are shifting from “everyone should take them” to checking personalized bloodwork to see what the body actually needs and how it fits into a broader strength stack. Bone health is becoming part of a resilience ritual that supports mobility, strength, and vitality now, not just a concern for later.



Vibration Plates
Used to support bone density, circulation, and nervous system balance



Calcium and Vitamin D More education and hot takes on when levels dip—and how to supplement and when you don't need to.



Weighted Vest
Used to boost strength, bone health, and focus during walks or workouts.



DEXA Scan Reactions
Women sharing their surprise or empowerment after getting a bone scan.

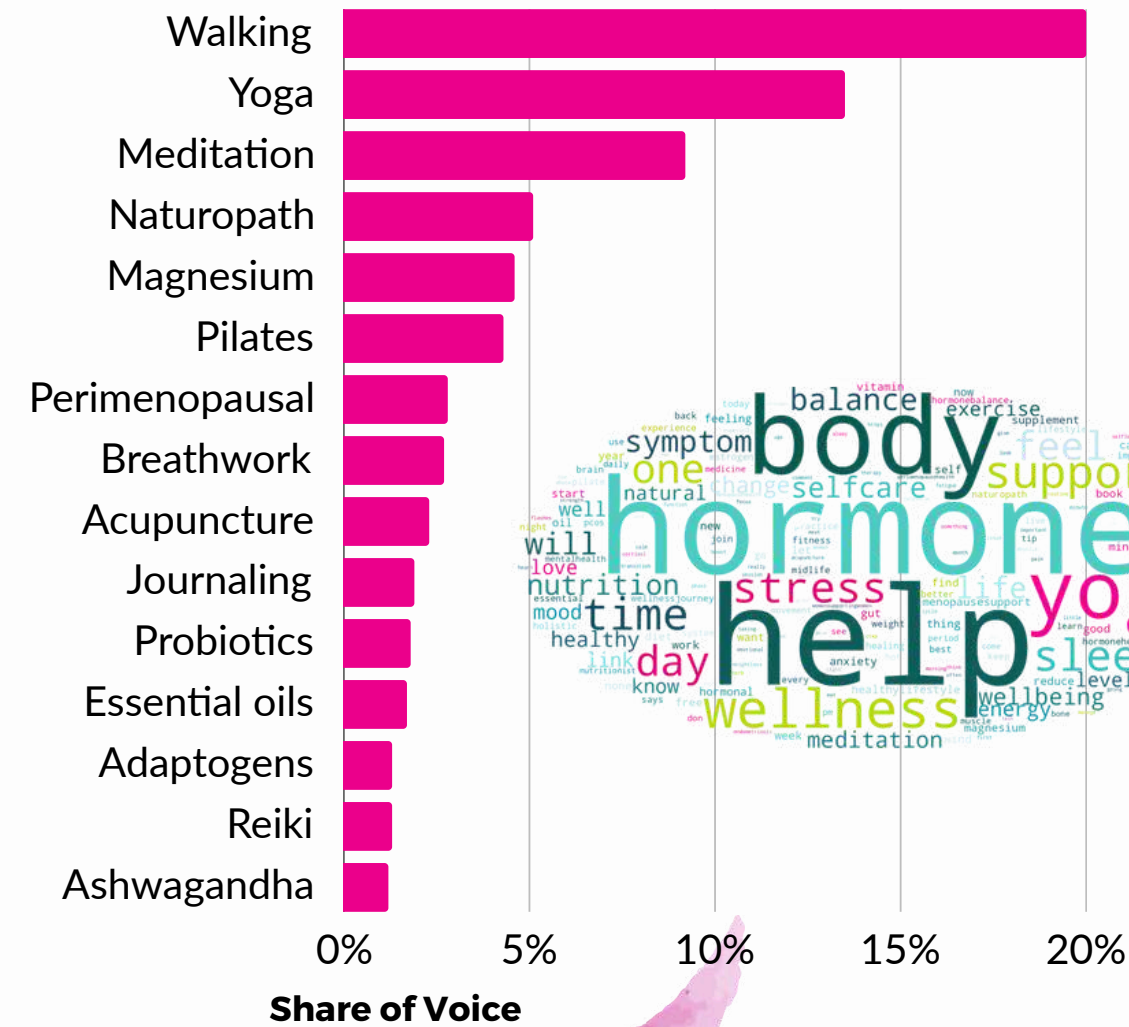
Rituals on the Rise: Mind, Body, and Midlife Balance

From walking and yoga to magnesium and adaptogens, daily practices are expanding beyond physical relief to support the emotional and mental transitions of perimenopause.

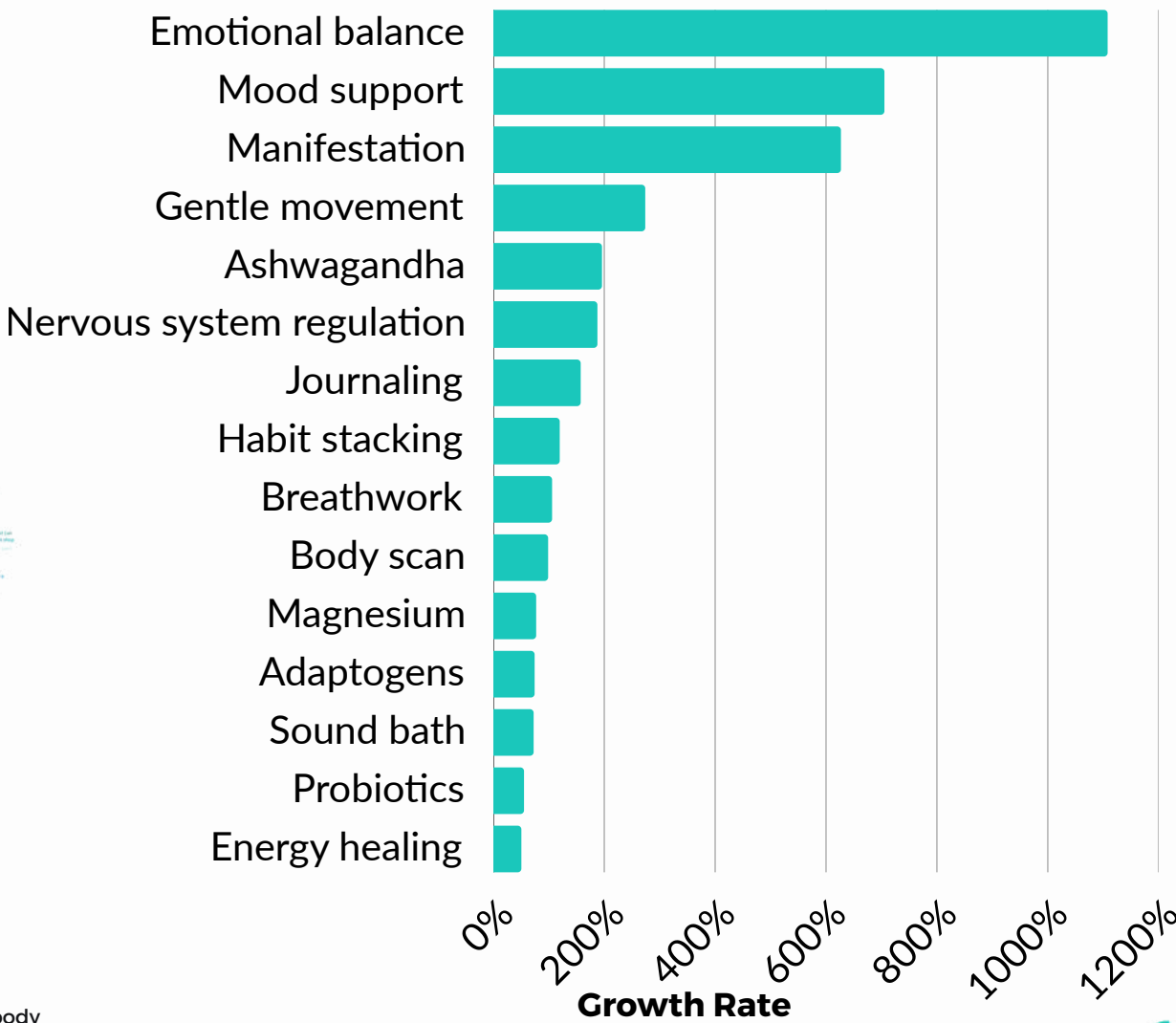
We analyzed social posts mentioning perimenopause alongside mind-body practices, daily rituals, and natural wellness. Walking, yoga, and meditation dominate, while supplements like magnesium, adaptogens, and probiotics are increasingly framed as part of daily strength and balance routines. Growth in terms like emotional balance and mood support signals that rituals are expanding beyond physical relief, openly addressing the emotional transitions of midlife.



Top Perimenopause & Ritual-Related Keywords



Fastest Growing Perimenopause & Ritual-Related Keywords



Wellbeing Over-Indexes For Perimenopausal Women (Self-Report vs. Gen Pop)

- Talk to a therapist Index 166
- Use cannabis Index 155
- Take vacation/PTO Index 134
- Practice yoga Index 131
- Exercise/play sports Index 128
- Listen to music/watch TV Index 126
- Disconnect from electronics Index 130



Queried social posts included discussion of perimenopause contained keywords surrounding the following topics: mind-body movement and practices, alternative and integrative healing, daily wellness rituals and routines, emotional and spiritual wellness, body literacy and tracking, supplements and natural health products, and tools and products for self-care.

Themes within Ritual perimenopause posts include...



Morning Walks Everyday
content highlighting how 15 minutes of walking = D + bone density + mood boost.

exploring_with_em_and_milo Sunshine walks are the best! ☀️
What's everyone got planned for the weekend?

#sun #sunshine #sunshine ☀️ #lovesummer #summer #summervibes #summeroutfit #summertime #summerstyle #summerholidays #summerdays #lovesun #lovesunshine #moresunplease #walk #walking #walks #sunshinewalks #cornwall #cornwalllife #cornish #cornishgirl #kernow #kernowfornia #kernowlife #kernowstyle #cornwalluk #cornwalliving #lovecornwall #walkingcornwall

Perimenopause
ing Walk

what I've always
any more?

A fitness And In Health
15 hours ago



At some point in
perimenopause, I realized I was
drinking every day.

menopausepath • Follow

👉 I also downloaded an app (I'm Done Drinking) that tracked how many days I went without drinking alcohol.

👉 Finally, I followed a number of sober influencers online to keep positive messages coming my way like:

@jenleehirst, @soberflourish and @shannonieghmcabe

21w

Join Josie 🍷🍷🍷🍷 Many of us can relate.

20w 1 like Reply

soberflourish 🍷 What a gorgeous & informative post. Congratulations on the

NA Happy Hour
Women are swapping alcohol for NA drinks to improve sleep and balance hormones.



My Top 3 supplements for
perimenopause sleep



Afternoon Delights - Sparkling Supplements
Top supplements target sleep, mood, and energy —shared in daily routines.



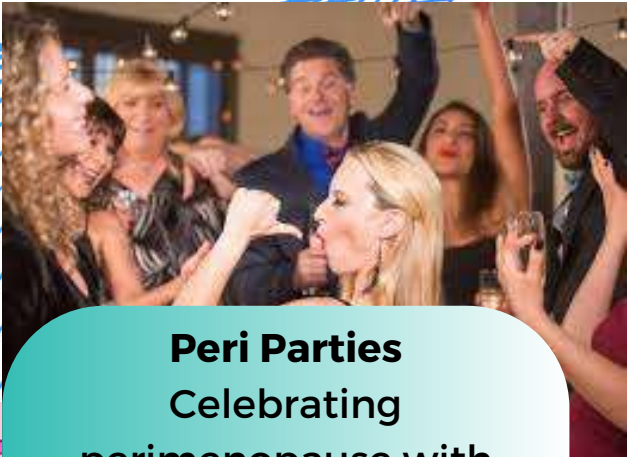
I'm 45. This is my cardio now.
Daily walking • short sprints or a weighted vest 1-2x/week.



Magnesium Baths
Simple self-care rituals that help with relaxation, muscle tension, and sleep. Innovations with intersections in ingredients.



Epsom salt bath right now I
uh



Peri Parties
Celebrating perimenopause with themed gatherings and humor.



Mental Health Gets Center Stage

Therapy talk, breathwork, meditation, community care, and sleep sanctuaries are reshaping what resilience looks like during hormonal change.



Focused on mental health  79.6%

From our panel: Women in perimenopause are more likely to

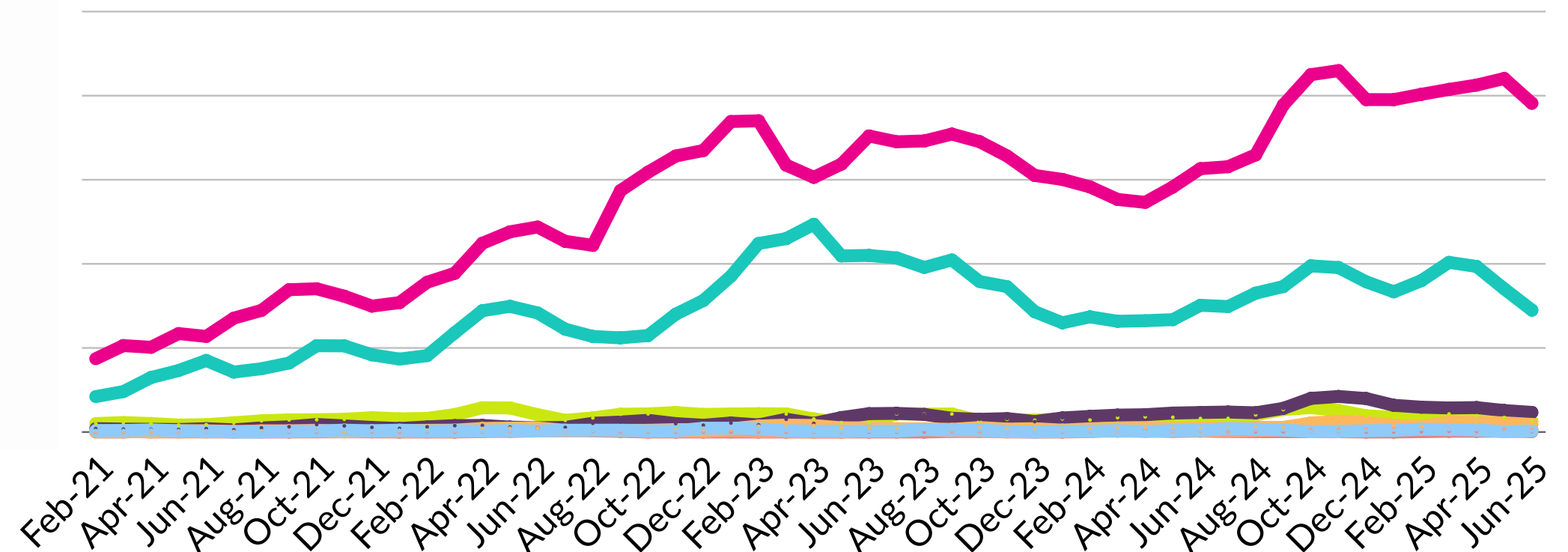
- Be **focused on mental health (80%)**
- Report **high stress**: Nearly 48% say they're stressed or very stressed
- Experience **anxiety (44%)** and/or **depression (31%)**

Fastest Share of Voice (SOV) Growth H1 2024 - H1 2025:

Self-Help & Mindset Tools: +133%
Digital Mental Health Tools +56%
Therapy & Mental Health + 39%

Perimenopause & Mental Health Social SOV

- Therapy & Mental Health
- Breathwork & Meditation
- Community & Peer Support
- Sleep Routines
- Perimenopause Resources & Media
- Tracking & Journaling
- Self-Help & Mindset Tools
- Digital Mental Health Tools



Topic Clusters in Perimenopause and Mental Health



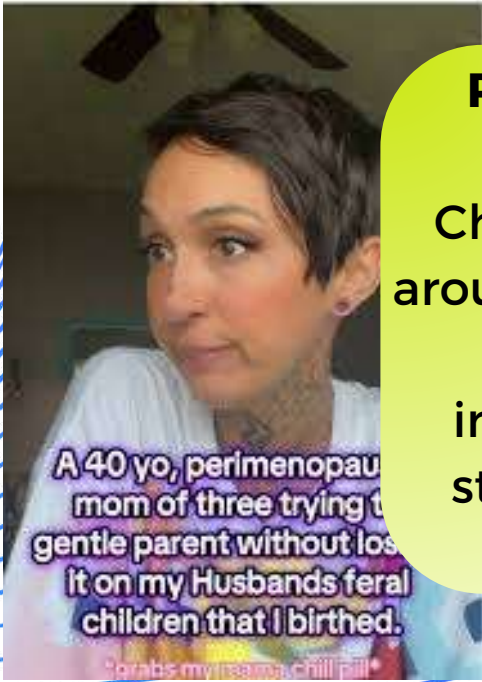
“Just another day in perimenopause”
Relatable, everyday symptom check-ins shared with honesty and humor.



Not Recognizing yourself
Common content theme: feeling unlike yourself during hormonal shifts.

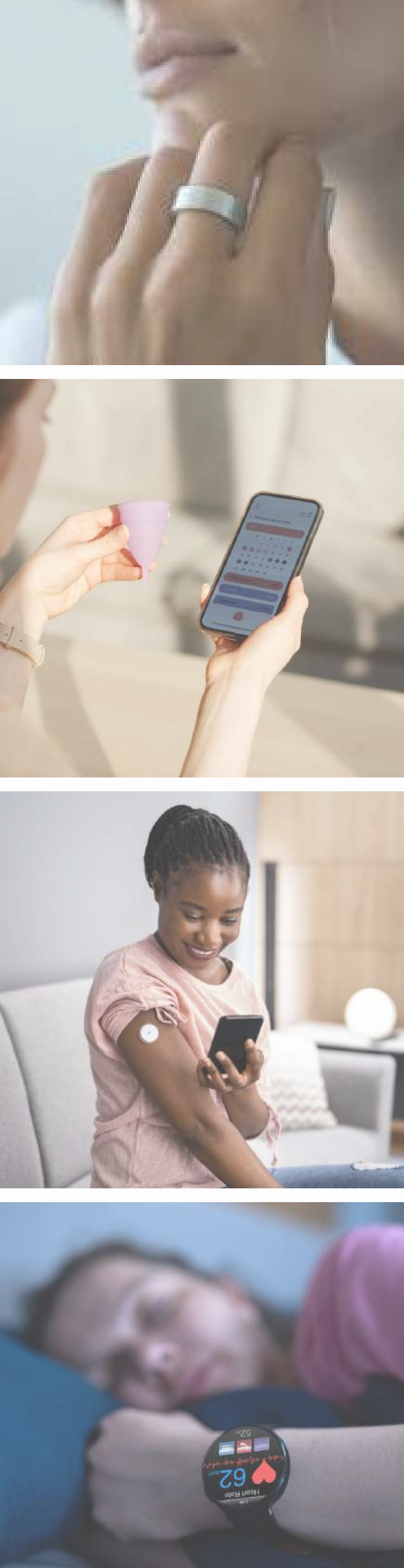


“We do not care” movement
A bold rejection of people-pleasing; embracing midlife confidence.



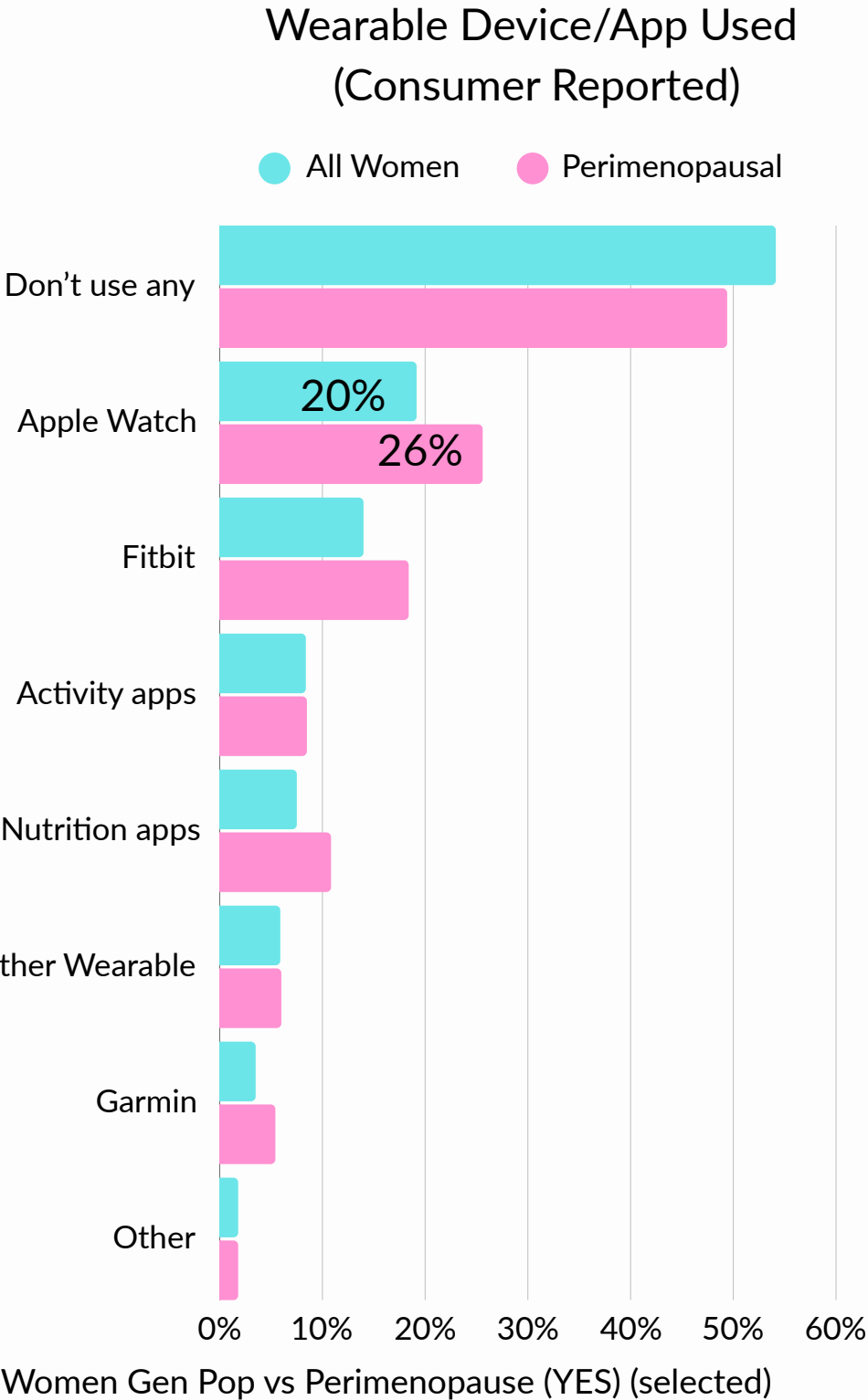
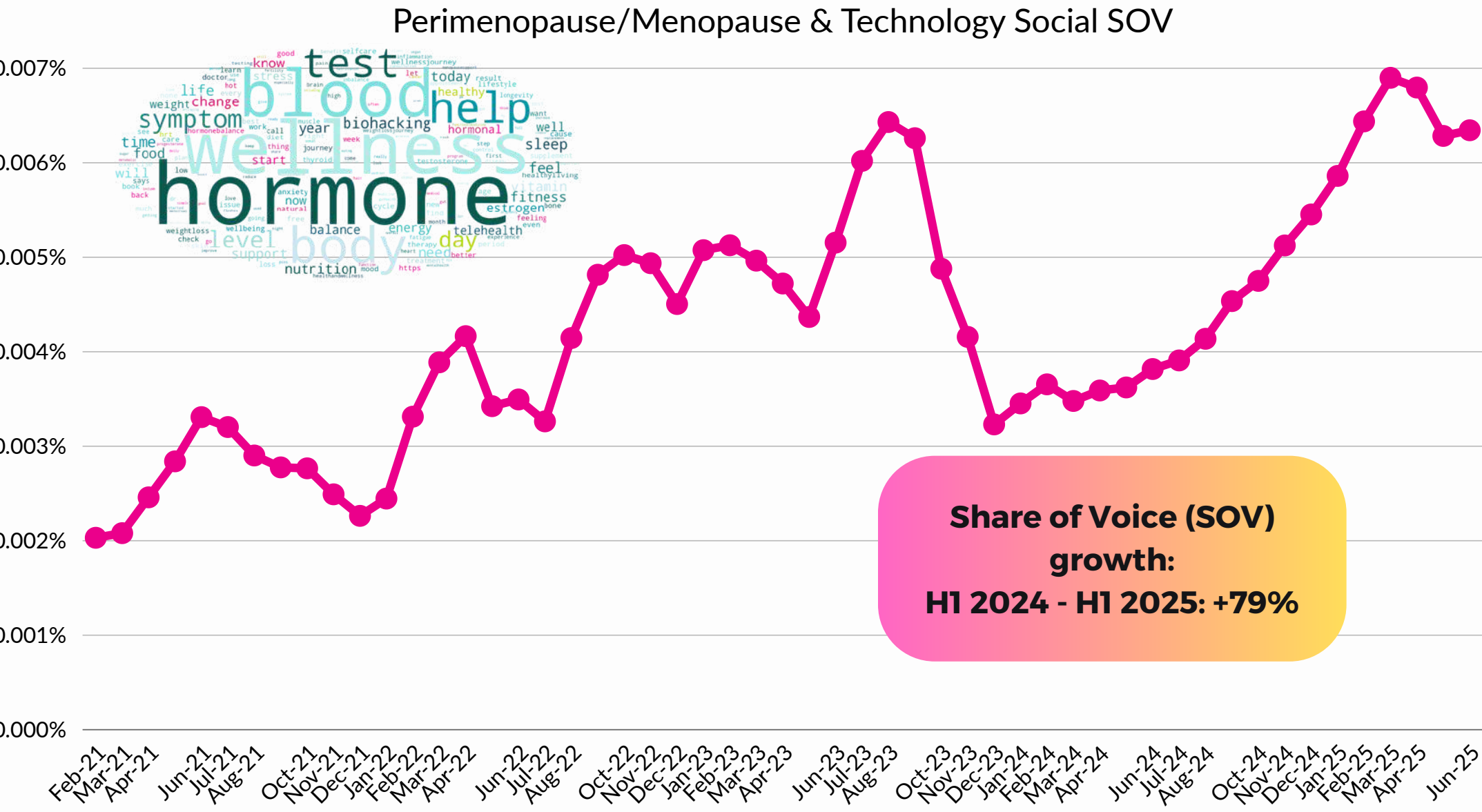
Perimenopausal Moms
Challenging stigma around motherhood at midlife and the intersection of life stages—often with humor.





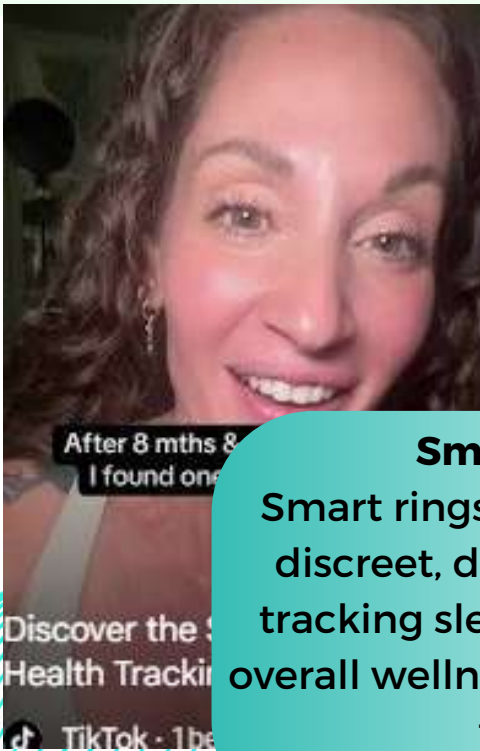
Femtech Goes Menotech

Women experiencing perimenopause over-indexed with smart trackers. Social buzz is also strong. As millennials continue to age into perimenopause the expectation that their technology incorporates perimenopause experiences strengthens this trend.

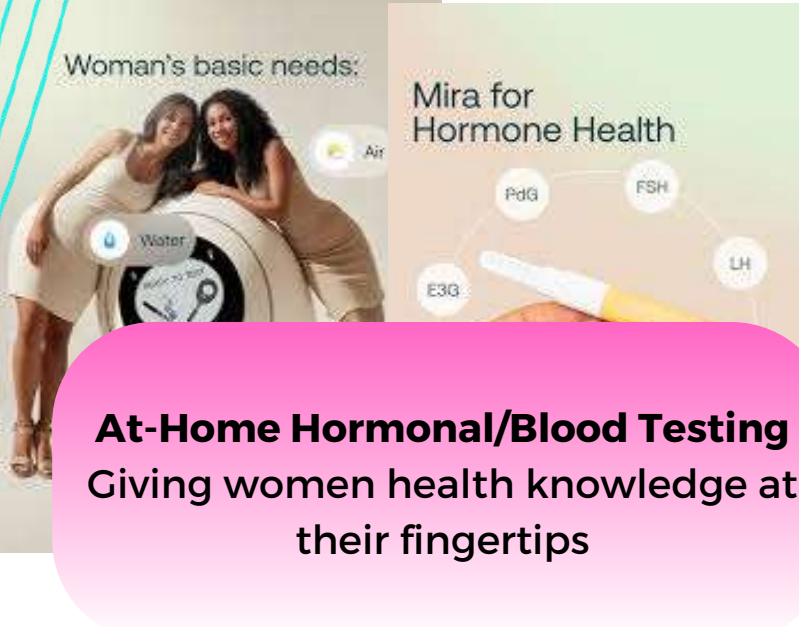
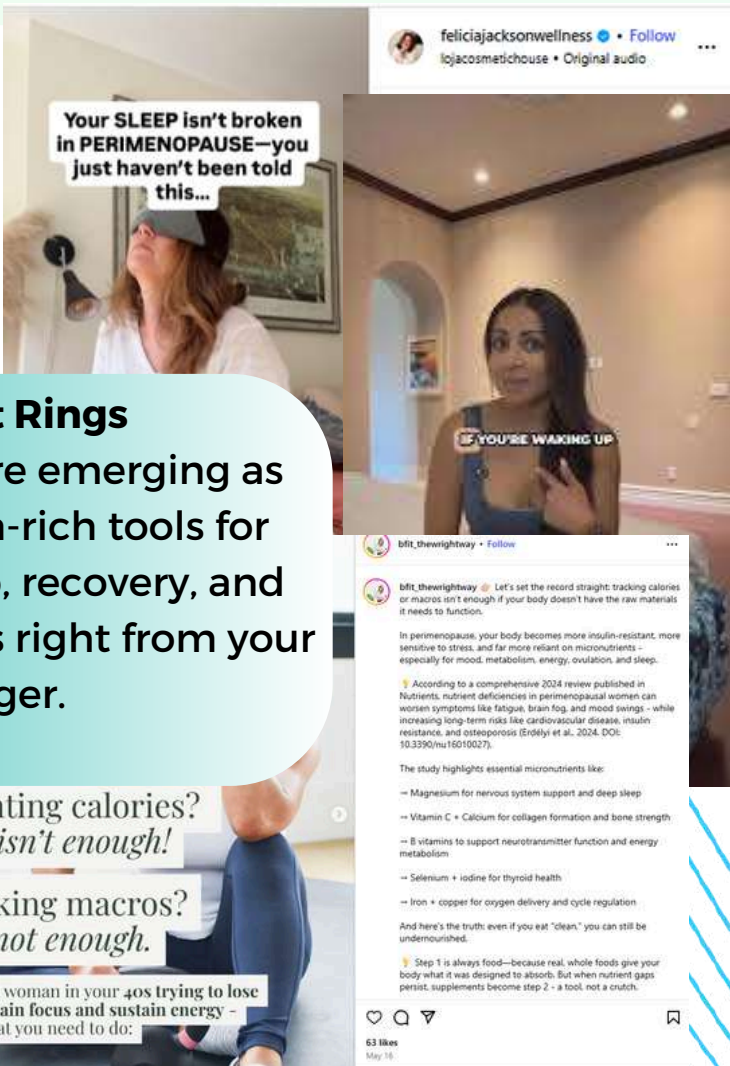


Source: Brightfield Group; Wellness Consumer Insights; Q3 2024 - Q2 2025

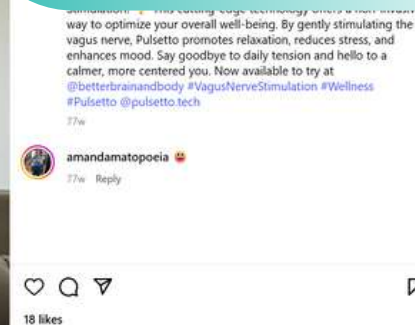
Topic Clusters in Perimenopause and Femtech



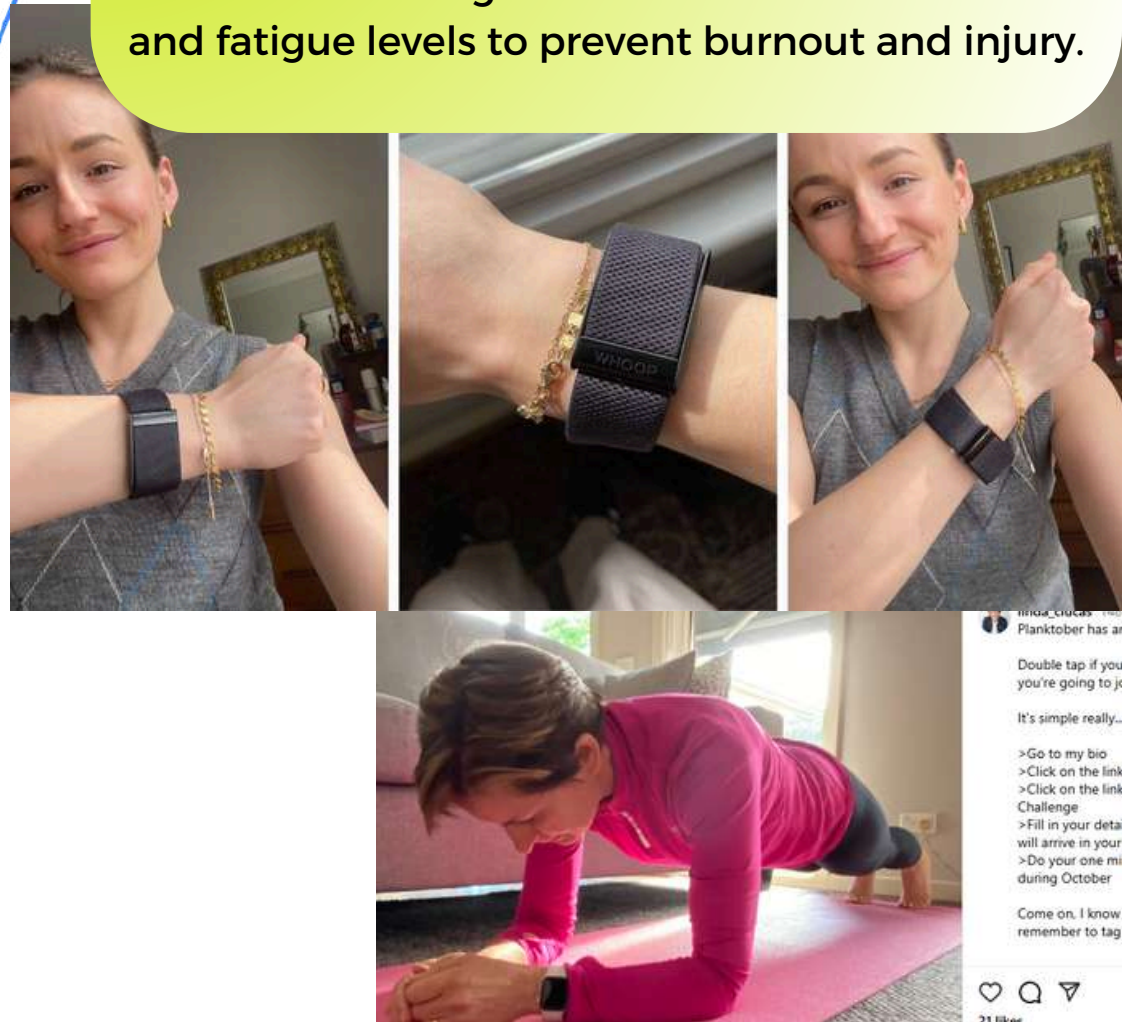
Smart Rings
Smart rings are emerging as discreet, data-rich tools for tracking sleep, recovery, and overall wellness right from your finger.



Vagus Nerve Stimulation
A “nervous system reset,” these wearables use gentle pulses to ease anxiety, lift mood, and improve sleep.



Light-Based therapy Used for bone strength, skin rejuvenation, recovery, and mood in perimenopause. Gaining traction, but sentiment is mixed around effectiveness.



Fitness Tracking 3.0
Tracking muscle recovery, HRV (heart rate variability), and energy levels. Adaptive training: workouts that align with hormonal fluctuations and fatigue levels to prevent burnout and injury.



Eye-Based Stress Relief:
The return of blue light glasses and the rise of smart goggles.



Peptide Craze Beyond GLP-1

Move over Lions Mane and Reishi, here comes Cordyceps

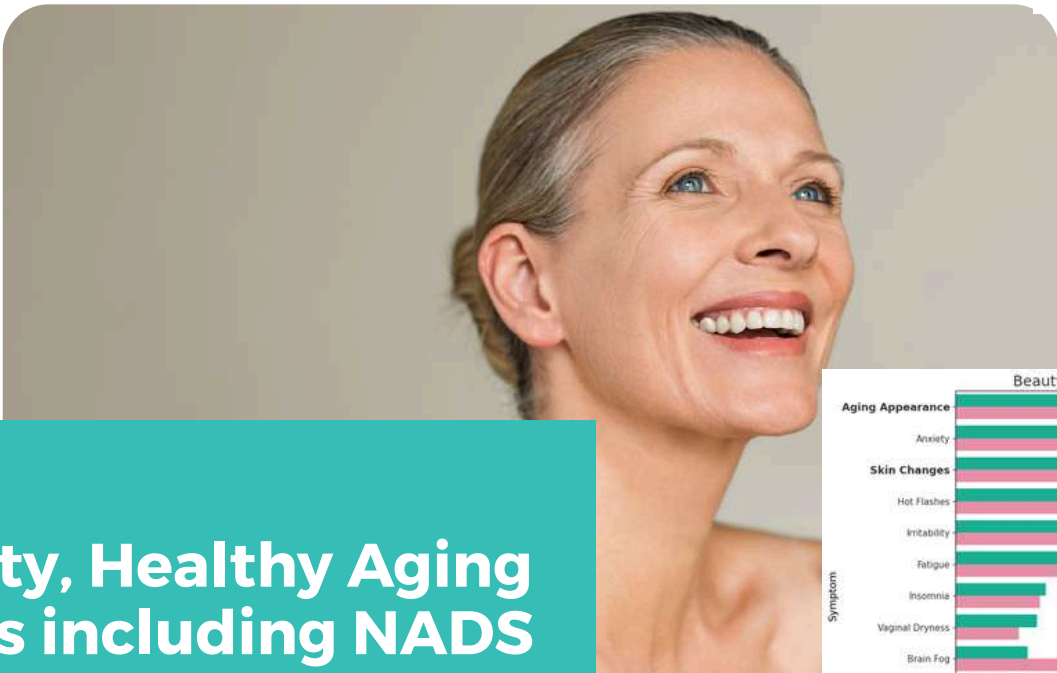


What's Ahead

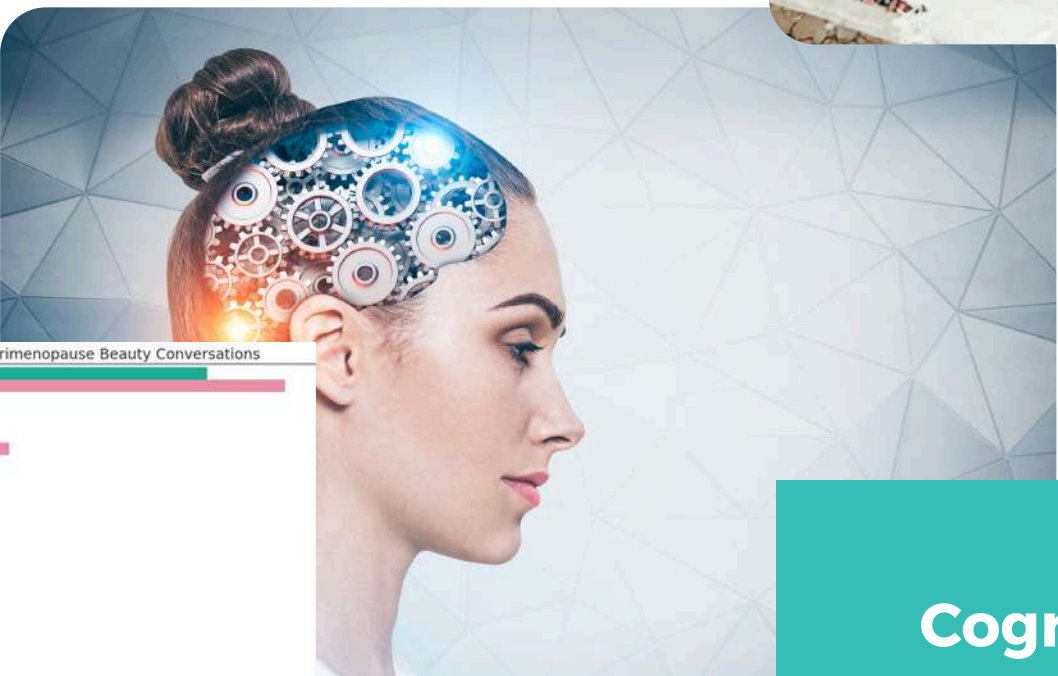
Ingredient	Share of Voice	Growth Rate
Peptides	7.74%	1081.60%
NAD	1.20%	724.41%
Coenzyme Q10	0.35%	449.91%
Ashwagandha / Winter Cherry	3.45%	357.32%
Vitamin K	0.23%	341.48%
Cordyceps	0.64%	300.56%
Creatine	1.87%	251.61%



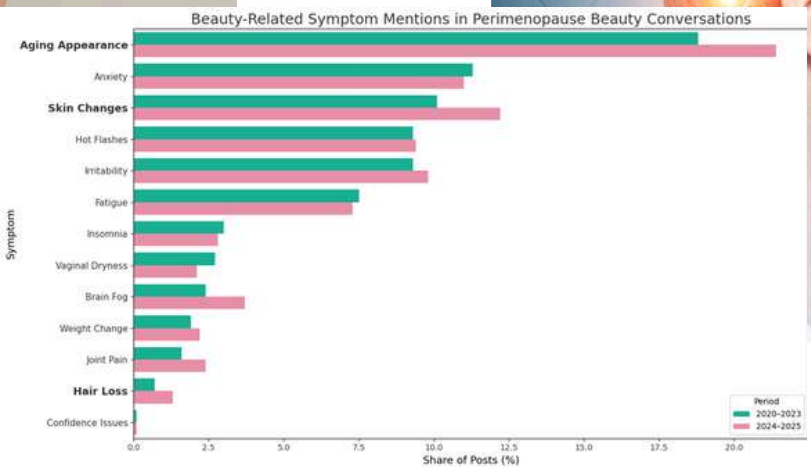
Alcohol Rituals Re-examined



Beauty, Healthy Aging Hacks including NADS



Cognitive Health

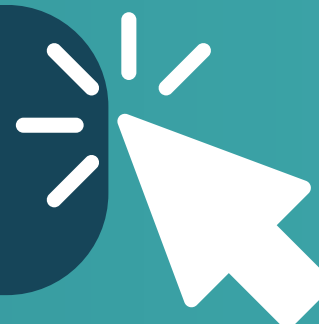




Women's Wellness Module - CPG Wellness Study

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

Get in Touch!



Women's Wellness Dedicated Insights Study

Q3/2025 - Research begins - Pre-Sell now Available!

Quarterly Survey - 5,000 women

Core Life Stages:

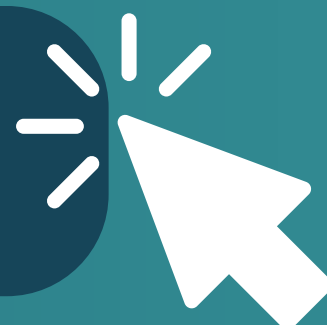
- Fertility (prime years)
- Perimenopause
- Post-Menopause

+ Comprehensive Social Listening Data



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Newsletter

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Women's Wellness Signals

powered by Brightfield Group x Femmar

Every two weeks receive women's lifestyle trend data to act on

Food & Nutrition
Supplements
Beauty Solutions
Mindfulness
Activity / Movement
Education
Communities
Spirituality

Through the Lens
of three health life stages:

Fertility (prime years)
Perimenopause
Post-Menopause