



NEW NEED STATE:

**MOOD
MANAGEMENT**

2025

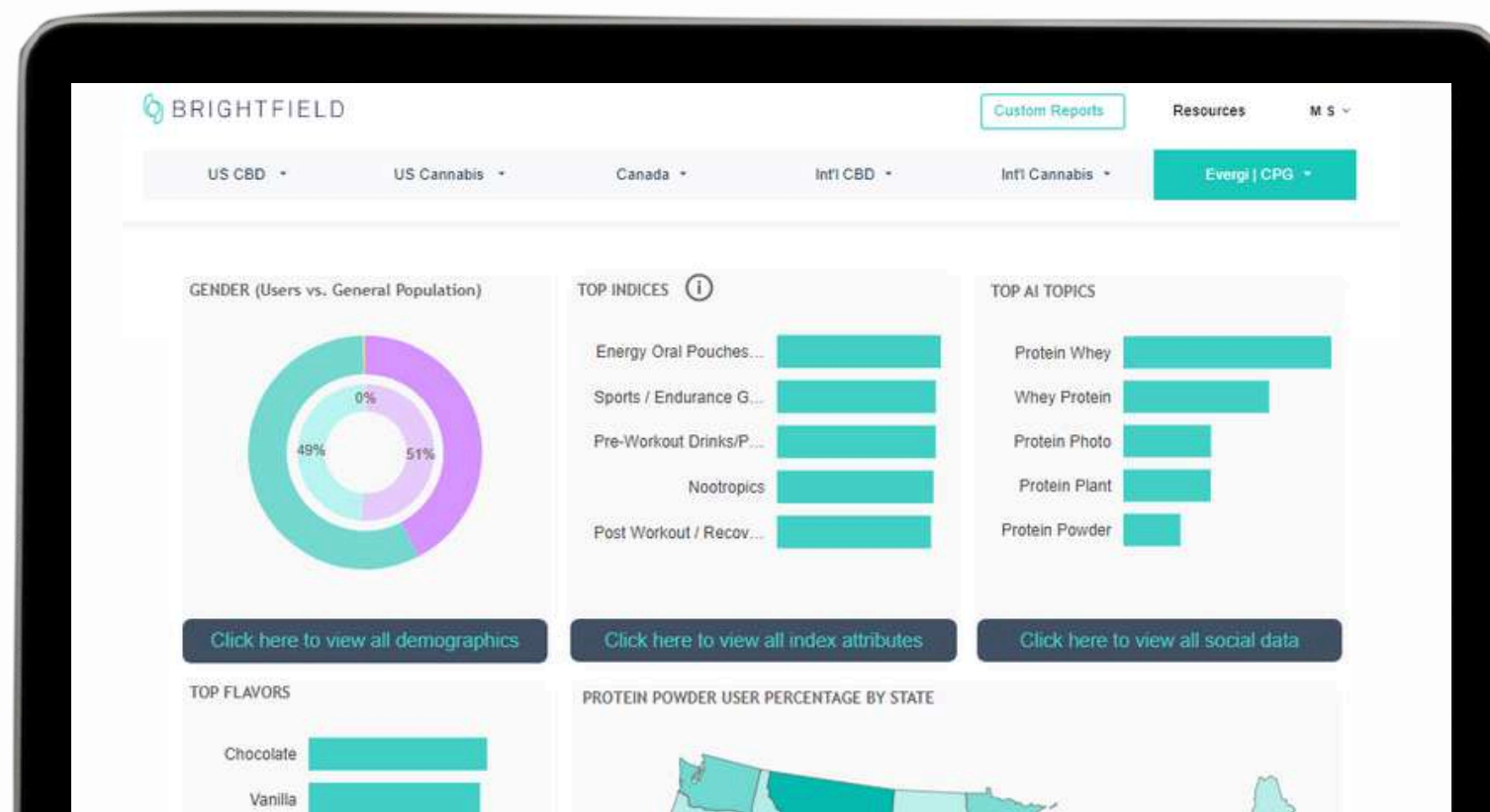
Gen. Pop. CPG Wellness Study



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 is the leading social listening-enabled research firm serving emerging wellness industries.



This is our **FREE** report

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

Brightfield Group consumer insights are integrated with social listening to dive deep into:

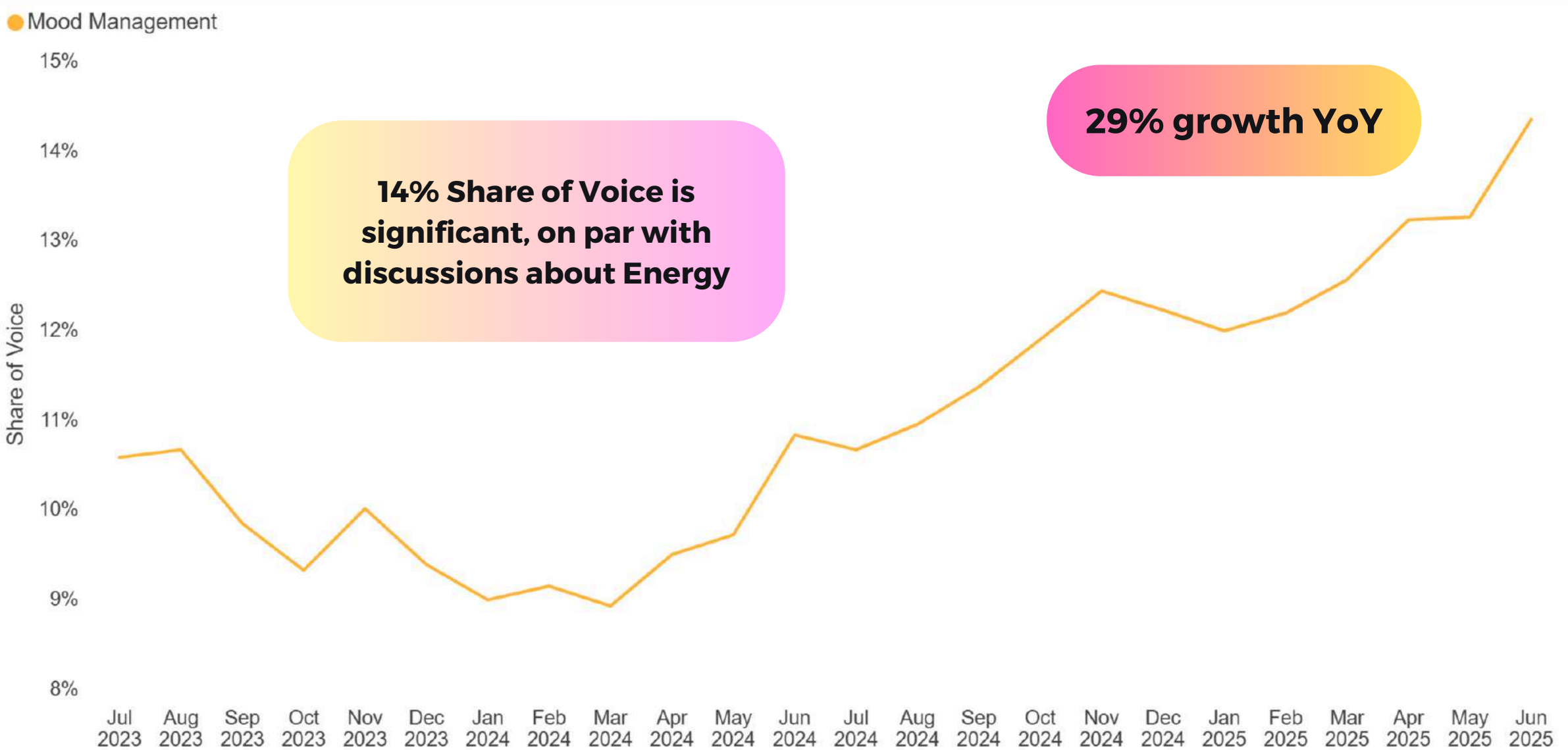
- Functional Beverages
- Protein powder and supplements
- Probiotics/Prebiotic Products
- Energy-boosting products
- Cannabis and hemp-derived THC's
- Ready-to-drink coffee
- & so many more categories!

Get in Touch!



Mood Management

Mood management is becoming a hot topic with consumers. On social media, mentions have seen strong growth since early 2024, rebounding after a mid-2023 spike. The 29% year-over-year growth seen in 2025 reflects strong demand for emotional well-being solutions. A 14% share of voice is very healthy and ranks among the leading conversation topics being tracked in Brightfield Group's social listening data (for reference, the share of voice of energy conversations is about 10%). Growth like this in social chatter points to a real shift in consumer interest and area of opportunity for brands.



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

[See more Trending Topics in our Social Listening Tracker](#)



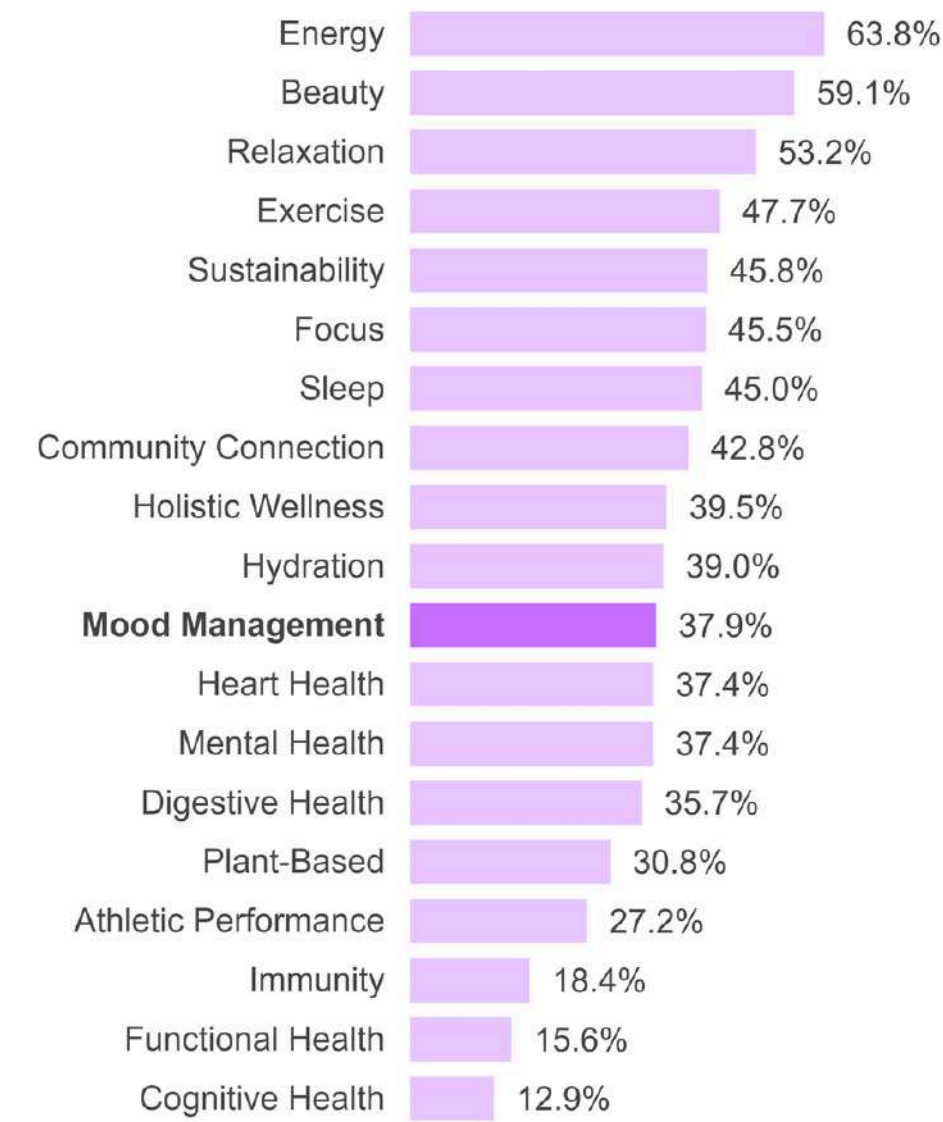
Need State Background

Brightfield Group’s need states were developed to identify consumers based on the specific needs they express through their responses to attitudinal questions. Created using cluster analysis, these need states differ from traditional segments in that they are not mutually exclusive—people can experience different needs at different times. Need states offer valuable insight into how many American consumers are seeking a particular need and allow for deeper analysis by grouping consumers accordingly. When viewed over time, they also help track which needs are increasing or declining in relevance.

Mood Management Need State

The Mood Management need state launched with strong momentum, capturing 38% of U.S. adults who strongly agree with key attitudinal and behavioral statements tied to managing mood through products. To qualify, respondents had to express high conviction around their mood-related behaviors and beliefs. However, when broadening the lens to include those who simply agree with at least one of those statements, a striking 75% of Americans acknowledge that foods and ingredients can influence their mood—highlighting massive untapped potential beyond the core audience.

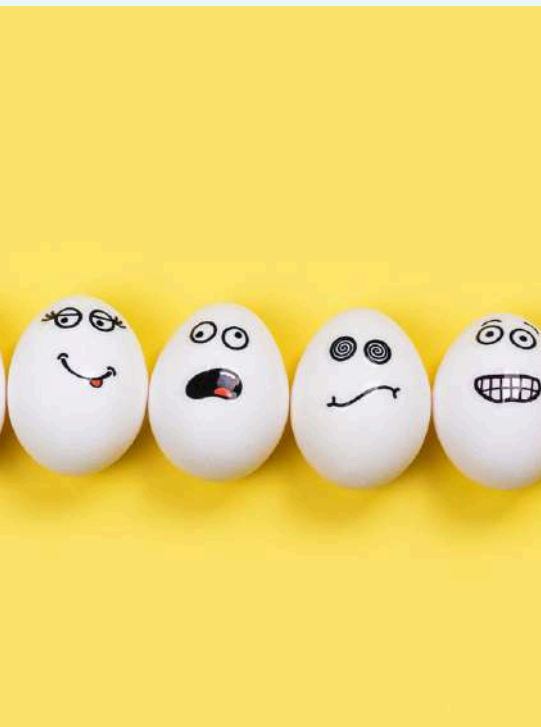
Need States





The Mood Management Consumer

Individuals seeking mood management are more likely to come from upper income brackets, live in cities, and report higher stress levels compared to the general population. Millennials and Generation X make up the largest share of this group, with a slight majority identifying as female. These individuals also tend to exercise more frequently, another method commonly used to help manage moods, among other benefits. Overall, the typical user tends to be a stressed, higher-income, middle-aged urban dweller with above-average levels of physical activity.

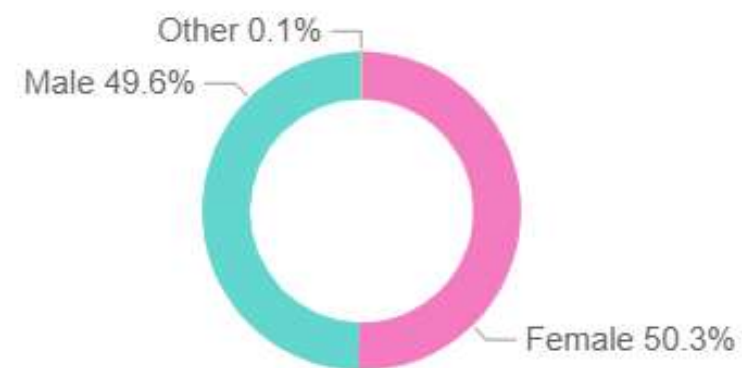


FROM THE PORTAL

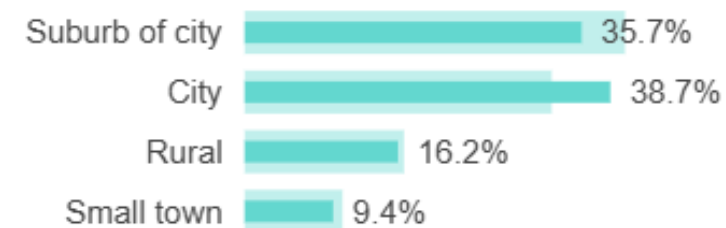
Income Level



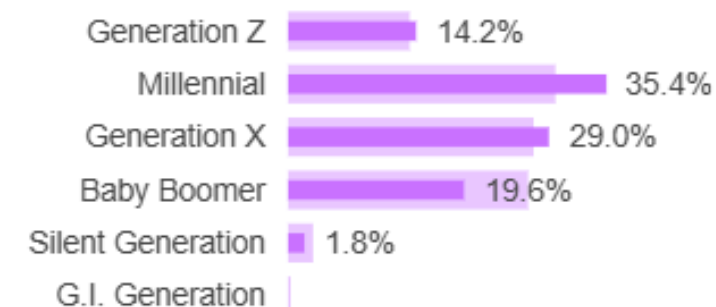
Gender



Dwelling



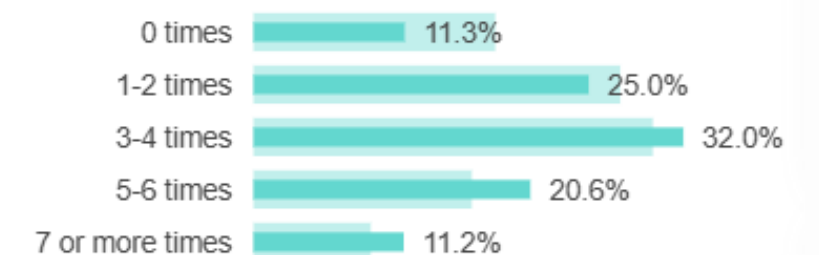
Generation



Typical Stress Level



Weekly Exercise Frequency



The darker bars represent individuals seeking mood management, while the lighter bars represent the general population.

FILTERABLE DATA HELPS YOU FIND THE TRENDS FAST IN BRIGHTFIELD'S WELLNESS CONSUMER INSIGHTS PORTAL



What's Next for Mood Management

From Niche to Normal: Functional Ingredients in Everyday Formats

Once confined to supplements or wellness stores, mood management ingredients like ashwagandha, lion's mane, nootropics, GABA, magnesium, and L-theanine are now being embedded into:

- Sparkling waters and sodas (e.g., Poppi, Recess, Kin Euphorics, De Soi)
- Functional coffees and teas (e.g., MUD\WTR, Taika, Clevr)
- Snacks and confections (e.g., mood-boosting chocolates, calming gummies like Olly, Auri)

Cross-Category Innovation

This repositioning expands beyond supplements, signaling mood support is no longer niche—it's becoming table stakes in health-forward CPG.

Personalized, Data-Driven Mood Support

Mood support is shifting from generic to highly targeted, with brands offering lines for focus, calm, energy, and sleep while using quizzes, health apps, and biometric inputs such as stress alerts from smart rings, heart-rate variability from watches, or CGM data to recommend the right product at the right moment.

Life-Stage and Hormone-Savvy Innovation

New formulations address specific needs from postpartum recovery to perimenopause calmers to PCOS-friendly blends that consider blood sugar swings and inflammation. Product timing is guided by mid-morning focus needs, afternoon relaxation, or pre-bed wind-downs, informed by signals like cortisol patterns, glucose fluctuations, or sleep tracker insights.

Ecosystems, Not Just Products

Partnerships with wearable tech and health platforms create continuous feedback loops, while integrated apps, guided meditations, and community spaces strengthen brand connection. For many consumers, it is about choosing a brand that understands their physiology, lifestyle, and emotional goals.

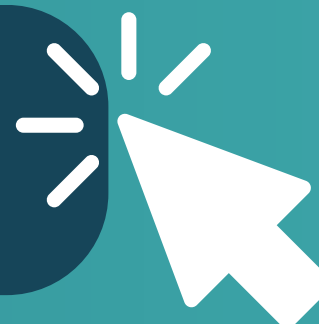




Stay ahead of all the wellness trends!

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

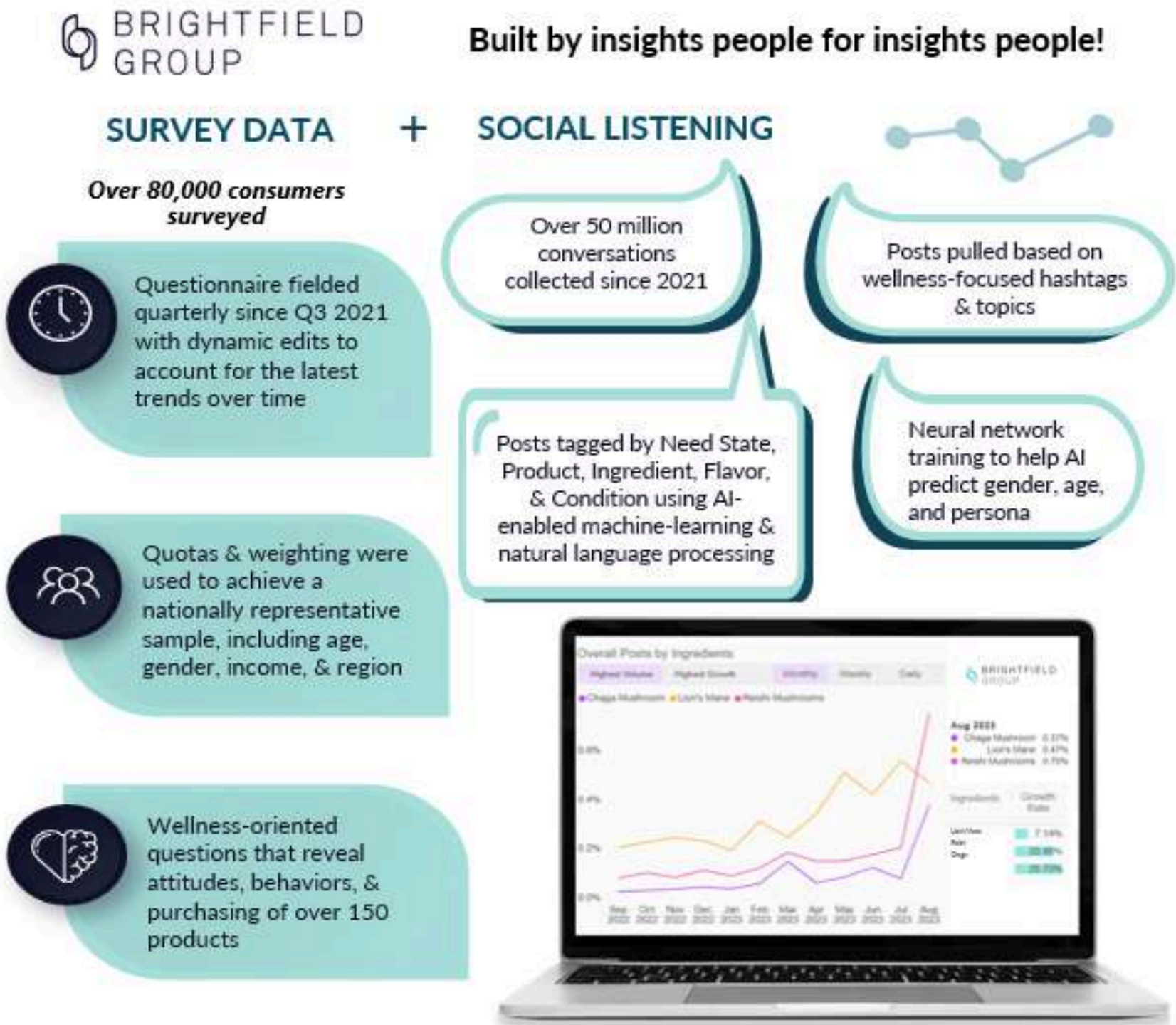
[Get in Touch!](#)



About Brightfield Group

Brightfield Group is the leading social listening-enabled research firm serving the U.S. wellness industry. We combine traditional consumer survey research with AI-integrated social listening to provide a deeper level of consumer insights.

Marketing, innovation, and insights leaders have trusted us to help drive customer-centric strategies since 2015. Our AI-driven consumer insights and social listening help marketing and innovation teams see the person behind the trend.



Learn more about our data at www.brightfieldgroup.com