



PERIMENOPAUSE: THE BUSINESS CONVERSATION YOU CAN'T AFFORD TO MISS

Brightfield Group CPG Wellness Study

2026



Today's Presenters



Kate Stevenson Floyd
Brightfield Group
Director of Client Strategy



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Women's Health Strategist;
Citrine Minds Consultancy

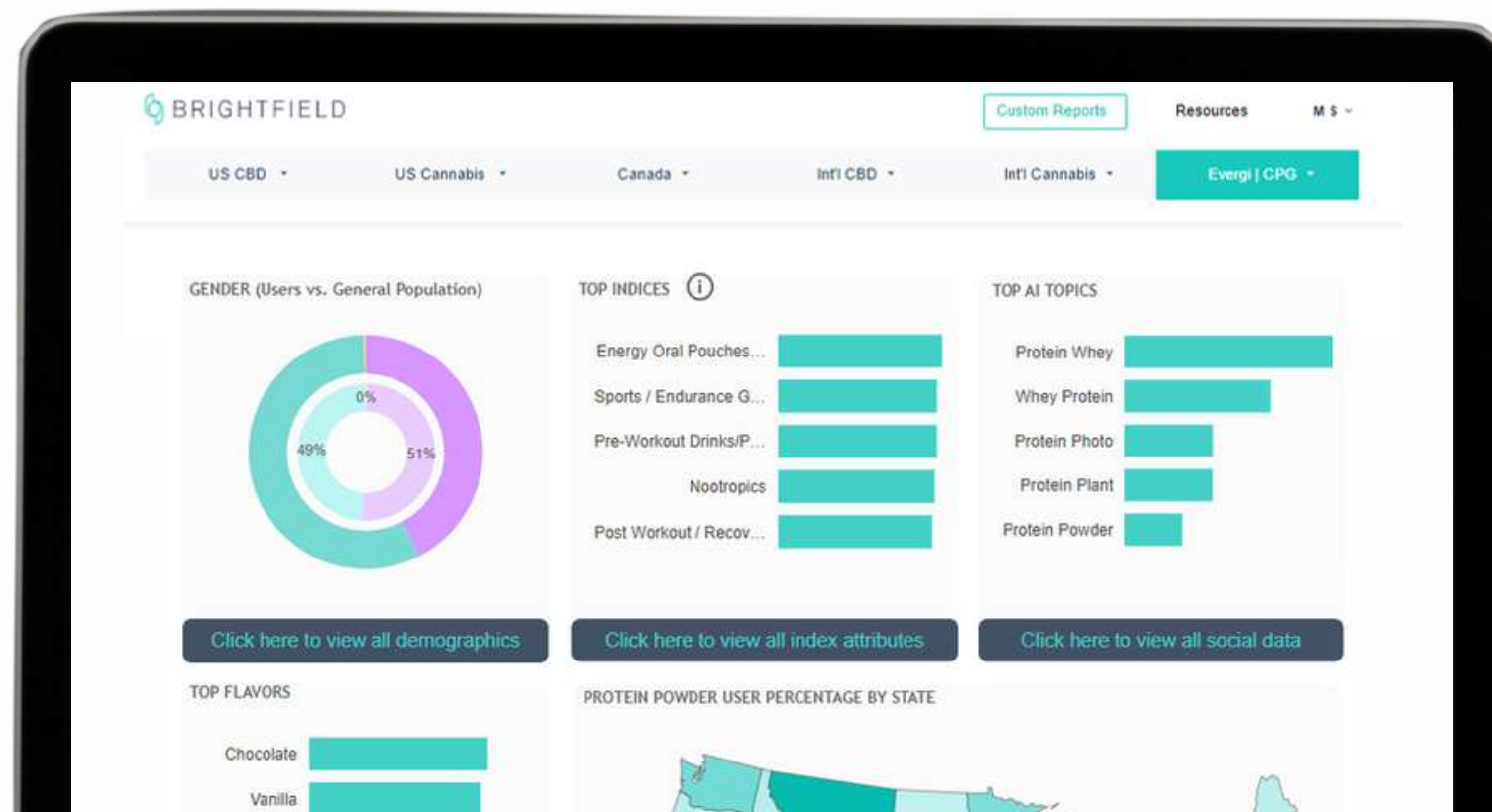


Jen Kregor
Brightfield Group
Head of Product

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!



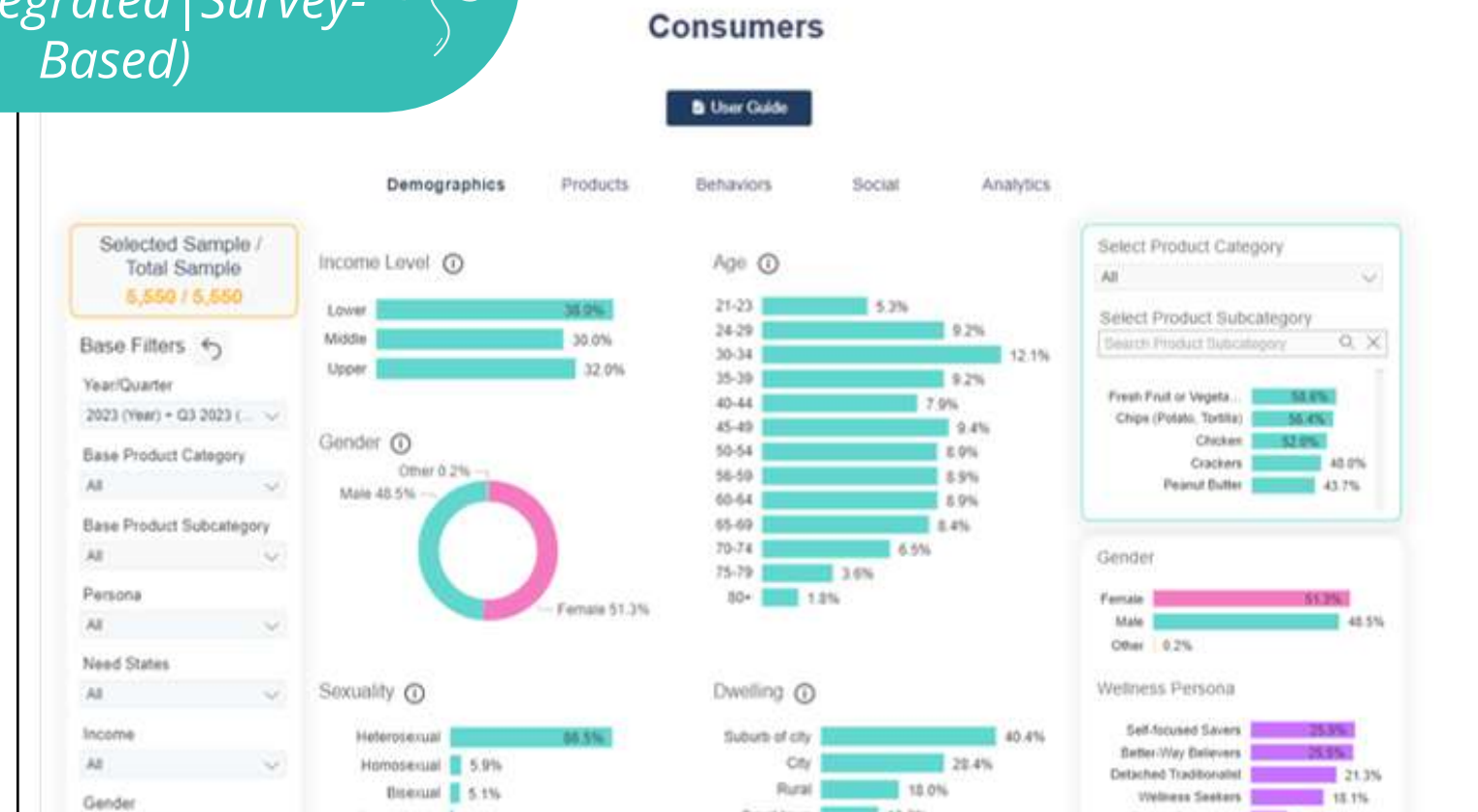
Wellness CPG Study

AI-Powered Consumer & Social Listening Dashboards

Launched 2020 | Continuously Evolving



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



Comprehensive Consumer Insights

- 95,000+ U.S. Adults surveyed since 2020 (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 X (Twitter), 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



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



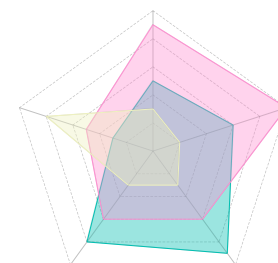
Psychology and Segmentation

- Psychographic profiles
- Wellness & lifestyle personas



Health and Well-being

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



Deep Dive Launched Q2 2025

Perimenopause Expansion Module

Questions asked amongst 35-55 year-old women who are not postmenopausal



Understanding & Awareness

- Self-identification as peri/postmenopausal
- 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

Sample Sizes Referenced this Report

Gen Pop (Q4 2025 N=6,054, H2 2025 N=11,244)

35-55 Women (Q4 2025 n= 620, H2 2025 N=1239)

Yes/Maybe Peri (Q4 2025 N= 367, H2 2025 N=734)

What's Happening Now

Perimenopause Awareness & Confusion Gaps

The Menopause Journey



Perimenopause



Menopause



Post-Menopause

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

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

Age Range: early-to mid-50's

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

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

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

Duration: 1 Day

12 consecutive months without a period

Duration: Remainder of life

Symptoms: erratic and intense, with hormones
fluctuating and unpredictable

Symptoms: mild to intense leading
up to this milestone

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

Fertility: declines rapidly

Fertility: official end

51% of Gen X & Millennial women do not rate their understanding of perimenopause as high. Less than 1/3 are confident about next steps

Perimenopause Awareness Rating

Gen X & Millennial Women

Perimenopause Understanding Rating

● 1 ● 2 ● 3 ● 4 ● 5

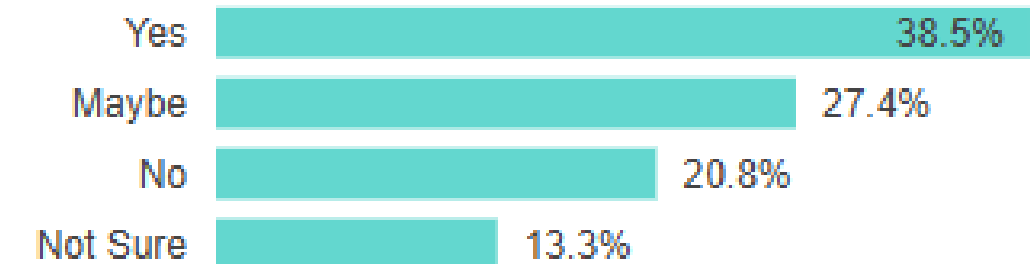


49% rate their understanding as 4 or 5

Perimenopause Symptom Recognition

Experiencing Perimenopause Symptoms

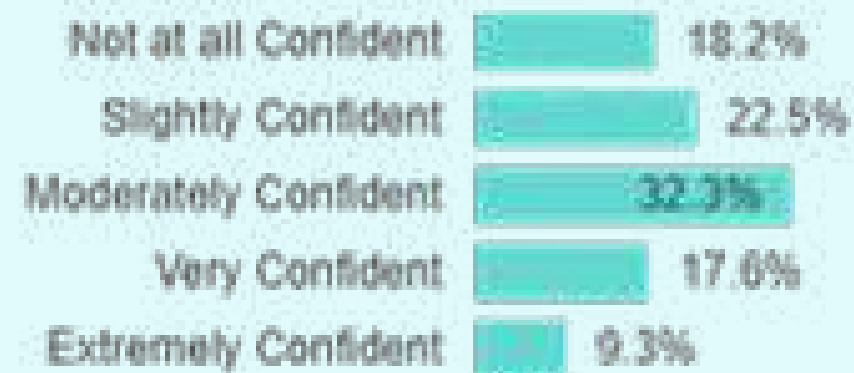
Are you experiencing perimenopause symptoms?



67%
"Yes & Maybe"

Asked of Women ages 35-55

Perimenopause: Confidence in Next Steps



Less than 1/3
are confident
about next steps

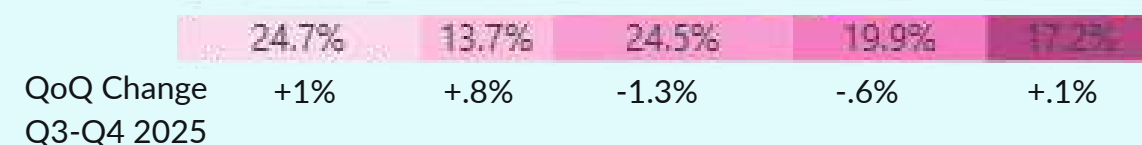
If you experienced symptoms of perimenopause, how confident are you in knowing what steps to take next (e.g. lifestyle changes, seeing a doctor, treatments)?

Asked of Women ages 35-55

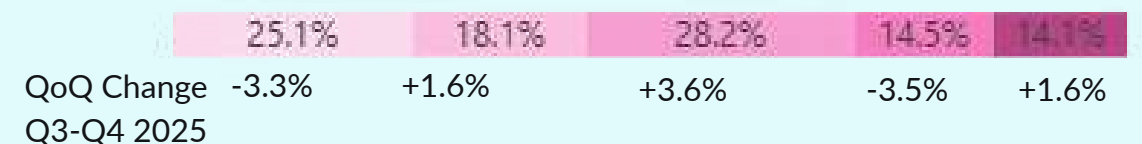


Gen Z'ers are gaining an understanding of perimenopause

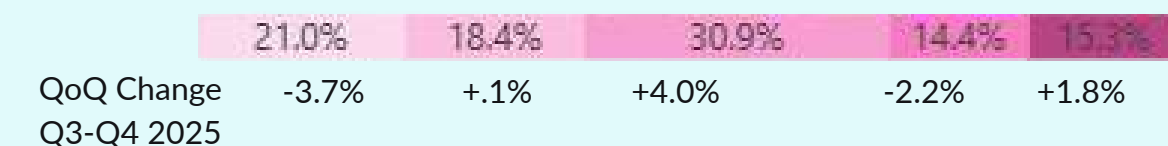
General Population Perimenopause Understanding Rating



All Gen Z Perimenopause Understanding Rating



Gen Z Women Perimenopause Understanding Rating



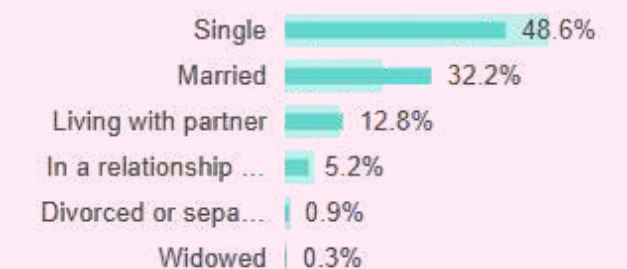
Gen Z'ers still under-index compared to the Gen Pop in terms of rating their understanding high, but many shifted from lower rating to middle and higher.

Gen Z'ers who rate their Perimenopause Understanding 4&5 compared to all Gen Z

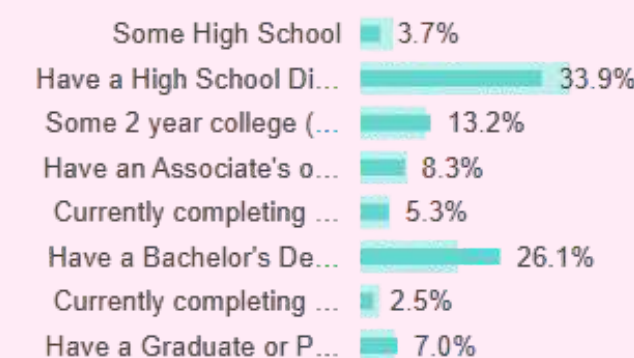
Gender



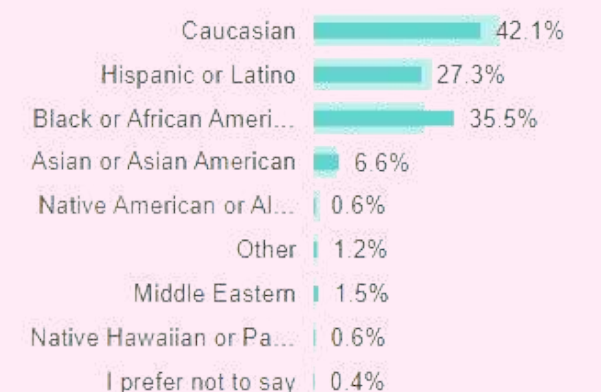
Marital Status



Education



Ethnicity



The Gen Z'ers with a high understanding tend to be Married, Bachelor's Degree educated, and more diverse. Surprisingly, pretty split from a gender perspective.

Perimenopause & Men

When men were asked specifically about their perimenopause knowledge, nearly 30% of men had a strong understanding of perimenopause (compared to 46% of women), highlighting both a gap in male knowledge around perimenopause and some confusion among women. Men with a strong understanding tend to skew millennial and higher-income.

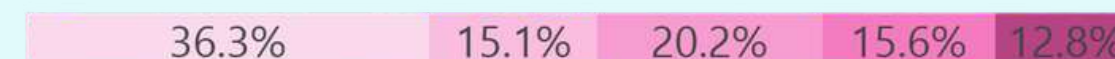
FROM THE PORTAL

Understanding Comparison

Men

Perimenopause Understanding Rating

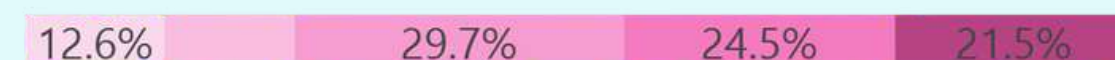
1 2 3 4 5



Women

Perimenopause Understanding Rating

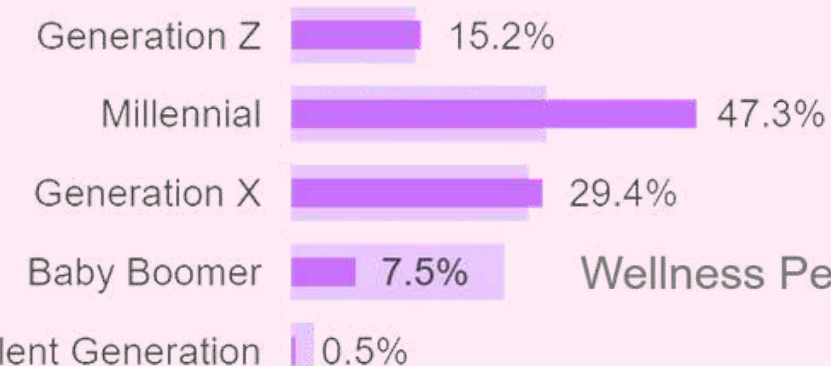
1 2 3 4 5



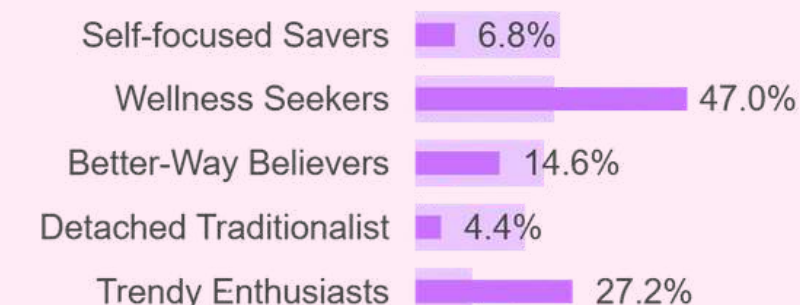
The darker bars represent men with a strong perimenopause understanding (4 or 5 out of 5), while the lighter bars represent the overall male population.

Men with High Perimenopause Understanding

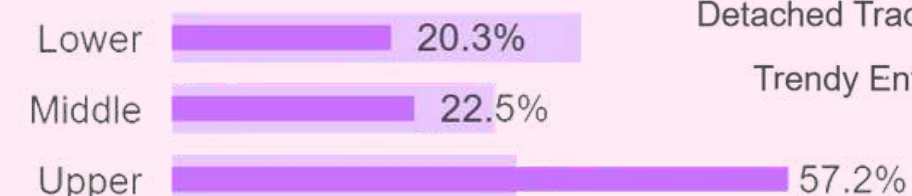
Generation ⓘ



Wellness Persona



Income Level ⓘ



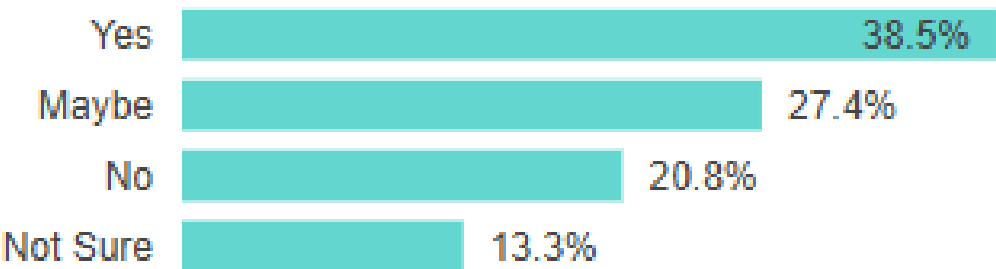
FILTERABLE DATA HELPS YOU FIND THE TRENDS FAST IN BRIGHTFIELD'S WELLNESS CONSUMER INSIGHTS PORTAL

Awareness Gap: Many Women Miss the Signs of Perimenopause

Q4 2025

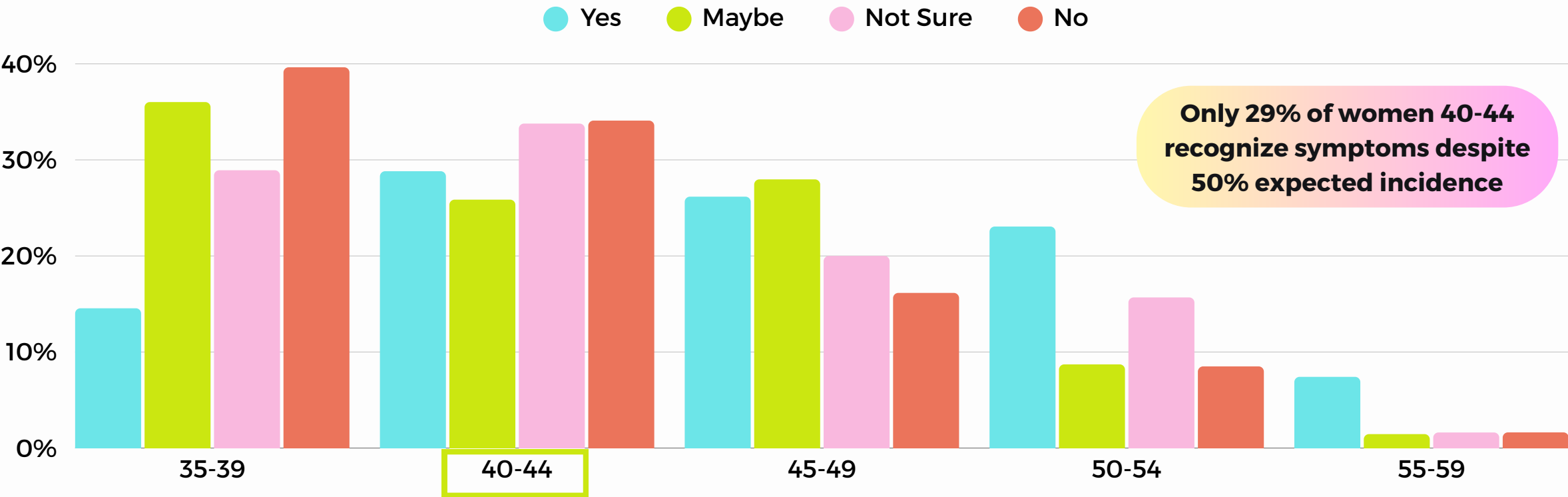
Experiencing Perimenopause Symptoms

Are you experiencing perimenopause symptoms?



Women who are “maybe” experiencing perimenopause symptoms skew younger, highlighting increased awareness among young adult women. A plurality of women report an onset of perimenopause symptoms between the ages of 40-49. However, confusion remains, with high rates of “not sure” among younger age groups.

Perimenopause/Menopause Self-Identify by Age



Source: Brightfield Group; Wellness Consumer Insights; Q4 2025; Total N = 6,054, Women 35-55 N= 620, Yes/Maybe Peri N = 367



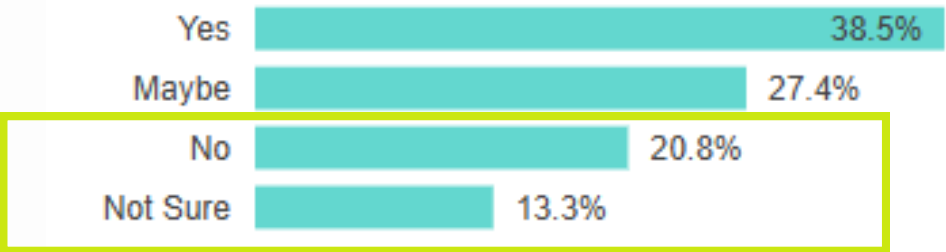
A significant share of women report multiple symptoms without identifying as perimenopausal

Common symptoms: Fatigue / low energy, sleep disruption, mood swings, weight changes, migraines, brain fog

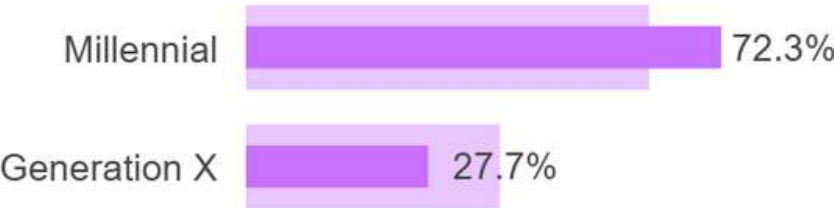
Q4 2025

Experiencing Perimenopause Symptoms

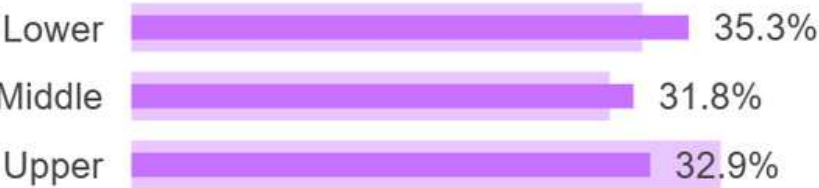
Are you experiencing perimenopause symptoms?



Generation ⓘ

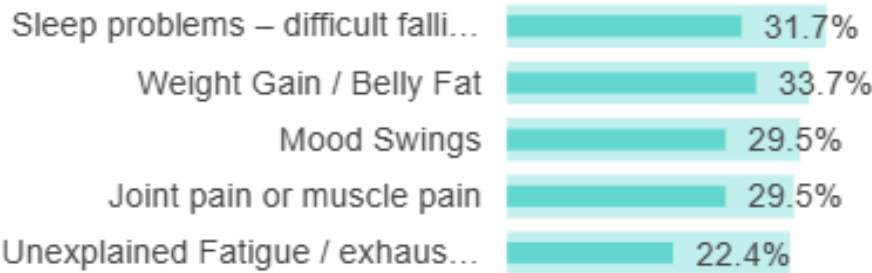


Income Level ⓘ

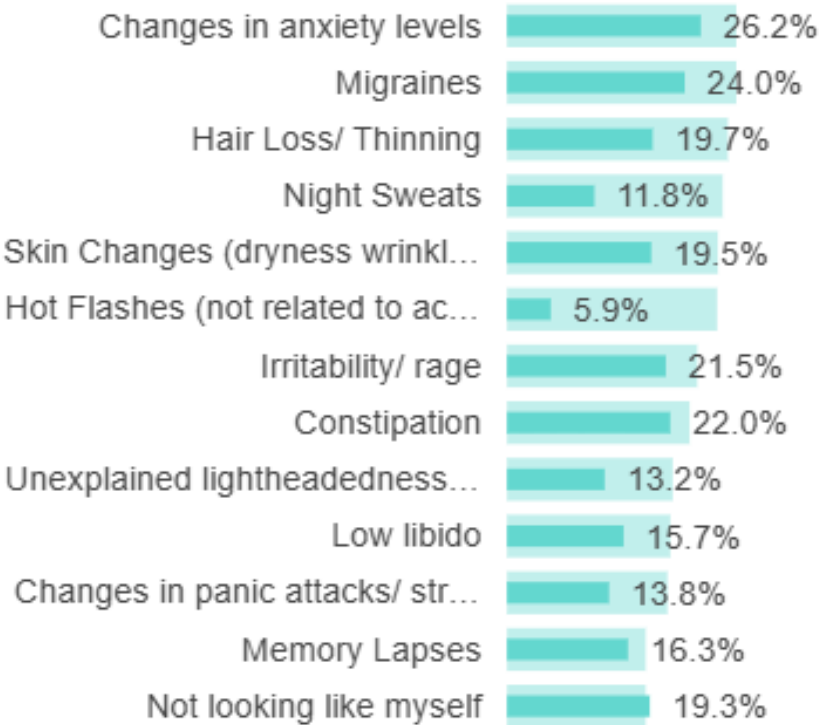


Perimenopause Symptoms

Have you noticed any of the following in your health or bod



54% Suffer from 3+ Symptoms despite saying “No/Not Sure” that they are in perimenopause



Source: Brightfield Group; Wellness Consumer Insights; Q4 2025; Total N = 6,054, Women 35-55 N= 620, Yes/Maybe Peri N = 367, No/Not Sure Peri N = 211

In-Store. Online. In the Buyer Room.

Perimenopause Has Retail Attention.

Walmart Data Ventures 

APPROVED! Feminine Health Destination That Evolves With Women From Menstruation to Menopause

Showcase your products to Walmart or Sam's Club - apply now for these two sourcing opportunities on RangeMe!

Submit Your Products Today!

Walmart 

[Walmart Menopause Campaign](#)

 **Deadline:** March 30, 2026
Meetings: IN PERSON on June 3-4, 2026 | ECRM Personal Care Session | Sawgrass Marriott Golf Resort & Spa | Ponte Vedra Beach, Florida
\$ Fee: \$500

ULTA
BEAUTY

Wellness by Ulta
2026 Pilot Concept



Walgreens



MENOPAUSE IS HOT



Menopause needs a rebrand.

For too long, society has told the story, shrouding it in stigma and shame. Which has led to generations of women misunderstanding, misdiagnosing and mismanaging symptoms. Menopause isn't what we've been told. Menopause is confidence. Menopause is power. Menopause is hot. Watch the #MenopausesIsHot full story below.



GenM



TESCO

Sainsbury's

Boots

Peri Experiences & Impact

**Consumer reported symptoms & issues that are
impacting everyday work and life**

Workplace Impacts

**\$26.6
billion**

annual cost to U.S. businesses because of the combined cost of lost work time and medical expenses among menopausal women. ³

**75
million**

U.S. women are within perimenopause to post-menopause life stages.²

65%

of women reported menopause symptoms impacted their work performance.²

48%

of women (40-49) say menopausal symptoms have negatively impacted their ambition.⁴

1 in 6

of menopausal women consider leaving the workplace ¹

3rd Party Research Sources:

1. Chartered Institute of Personnel and Development (CIPD), *Menopause in the workplace*, UK survey of 2,000+ working women aged 40–60, October 2023
2. Bonafide. *The State of Menopause 2025*. Bonafide Health, 2025
3. Faubion et al. *Impact of Menopause Symptoms on Women in the Workplace*. Mayo Clinic Proceedings, 2023
4. O'Neill M, Jones V, Reid A. *Impact of menopausal symptoms on work and careers*. Occupational Medicine, 2023.
5. Bowling Green State University Center for Family and Marriage Research
6. The Family Law Menopause Project & Newson Health Research and Education

Relationship Impacts

‘Menodivorce’

1 in 10

of all divorces were among adults 50 and older in 1990 ⁵

1 in 4

of all divorces were among adults 50 and older in 2019 ⁵

7 in 10

women said perimenopause or menopause is to blame for the downfall of their marriage. ⁶



The symptoms of perimenopause are real - and affect daily life

Defining Perimenopause Conditions (out of 40+ conditions)

Sleep Problems



47% Group Incidence
22% Highly Disruptive

Mood Swings



45% Group Incidence
21% Highly Disruptive

Unexplained Fatigue



42% Group Incidence
21% Highly Disruptive

Brain Fog



39% Group Incidence
17% Highly Disruptive

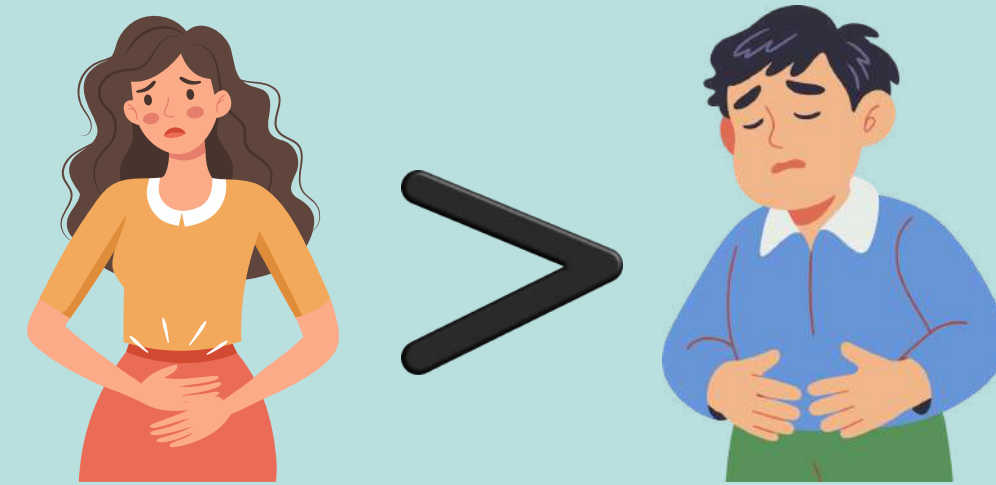
Perimenopausal women face more diverse health and wellness challenges than other women and men



Health Issues (Weekly+)

Over-indexing Issues compared to Women:

- **Trouble Concentrating** (+145.9)
- **Brain Fog** (+144.2)
- **Stomach Ache** (+141.8)
- **Forgetful** (+138.6)
- **Stressed/Anxious** (+137.5)
- **Headache** (+136.1)



Health Issues (Weekly+)

Over-indexing Issues compared to Men:

- **Brain Fog** (+204.6)
- **Forgetful** (+182.3)
- **Stomach Ache** (+180.3)
- **Trouble Concentrating** (+177.5)
- **Stressed/Anxious** (+171.4)
- **Headache** (+166.1)

Compared to men, women in Perimenopause are 2x more likely to suffer from Brain Fog, 1.8x more likely to report being forgetful on a weekly basis.

Perimenopausal women experience significantly higher levels of stress than men



Perimenopausal women carry a significantly higher stress burden than men

Stress levels and causes — perimenopausal women vs. all men



STRESS LEVEL BREAKDOWN



TOP CAUSES OF STRESS — WHERE THE DIFFERENCES SHOW UP



Mental Health Conditions rank significantly higher as stressors for perimenopausal women than men - a direct downstream effect of hormonal disruption that brands rarely connect back to the root cause.

Sleep is a key disruption for women in Perimenopause, and of Perimenopause Age

43%

of women between the ages 35-55 reported difficulty sleeping

#1 ranked condition

74%

of these women described this issue as Significant or Extremely disruptive to Daily Life

55%

of women who identify as in Perimenopause report difficulty sleeping

42%

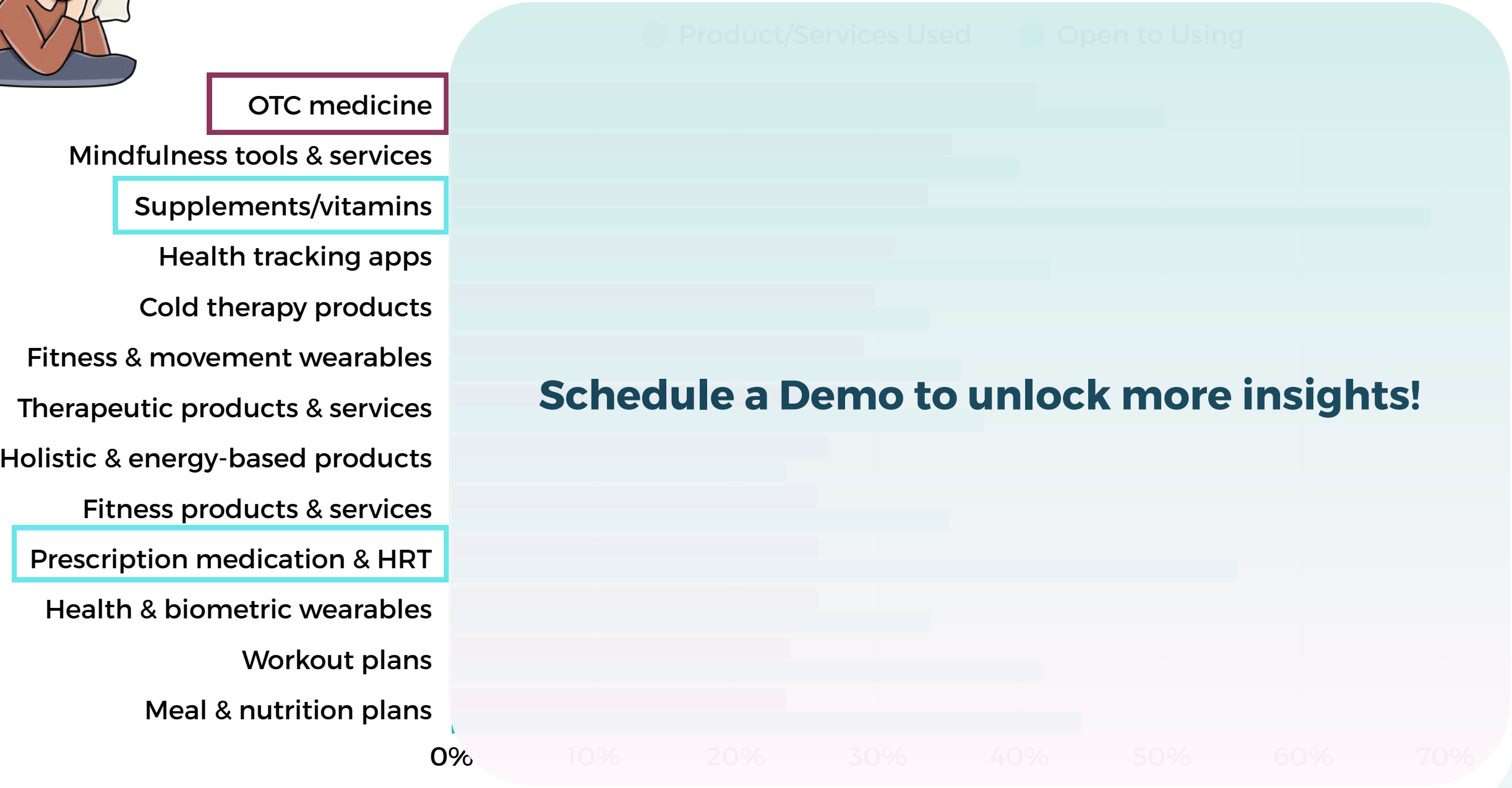
of these women are very dissatisfied and dissatisfied with the product options to treat Sleep Problems



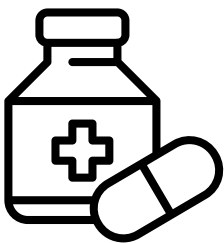
Most turn to OTC medicine for perimenopause sleep difficulties but want supplements/prescriptions



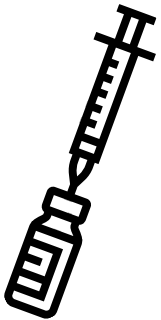
Sleep Difficulties - Products Used/Open to Using



How Women are Managing Perimenopause Sleep Troubles



OTC medicine leads in usage but interest in supplement/vitamin options is higher



Interest in prescription medications is also elevated, potentially including HRT



Many women are open to lifestyle solutions, such as workout and meal plans to help with sleep

Magnesium is the top ingredient mentioned in conversations surrounding sleep and perimenopause, though aloe vera and moringa has exploded over the last year

Ingredients Mentioned in Sleep & Perimenopause Conversations

Ingredients ⓘ

Most Popular

Top Indices

Top Trending

Magnesium	7.4%
Caffeine	3.4%
Vitamin D	3.0%
Peptides	2.6%
Collagen	2.4%
Melatonin	2.2%
Omega 3	1.4%
Probiotics	1.4%
Zinc	1.3%
Vitamin C	0.8%

Ingredients ⓘ

Most Popular

Top Indices

Top Trending

Black Cohosh	3,161.9
Phytoestrogens	1,784.7
Red Clover	1,719.1
Chasteberry	1,687.6
Valerian	623.9
Valerian Root	623.9
Maca	597.9
Maca Root	596.2
Rhodiola Rosea	581.1
Magnesium Bisglycinate	544.4

Ingredients ⓘ

Most Popular

Top Indices

Top Trending

Aloe Vera	835.2%
Moringa	592.8%
Dha	419.6%
Creatine	278.7%
Coenzyme Q10	269.5%
Tirzepatide	256.3%
Coq10	223.3%
Peptides	210.2%
Coconut Oil	200.2%
Whey	200.2%

Schedule a Demo to unlock more insights!



What Women are Doing

**Where women turn for help with peri across products,
relationships, and healthcare**

Women are navigating perimenopause on their own terms. Even as it significantly impacts their daily lives

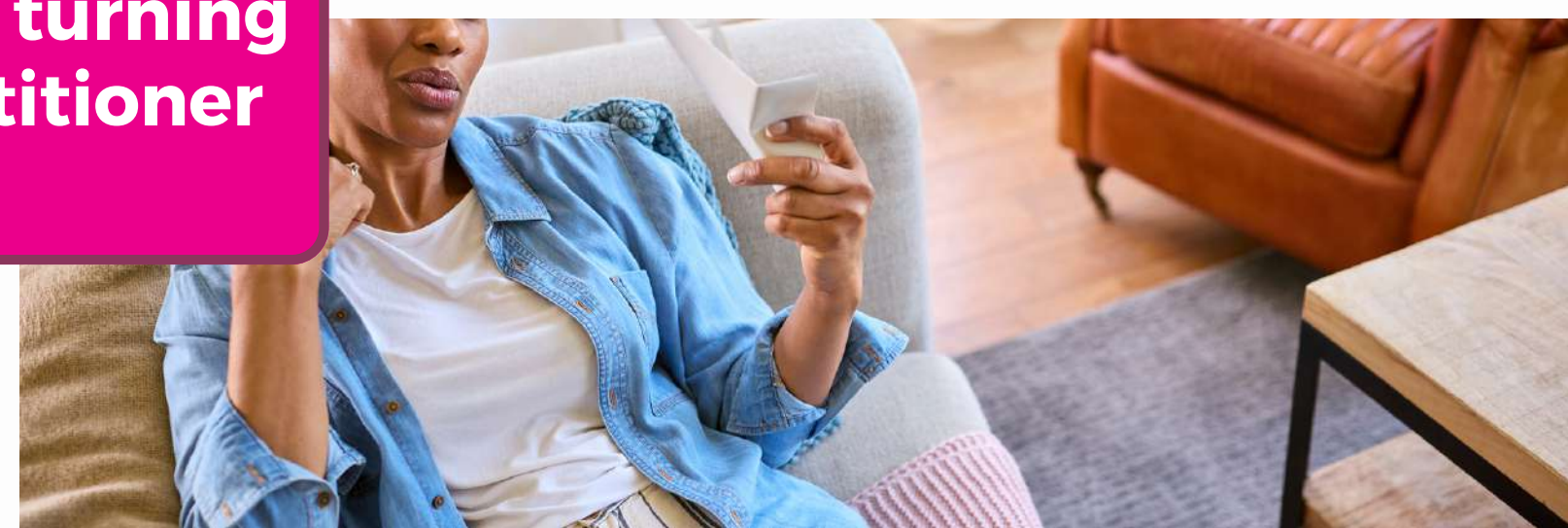
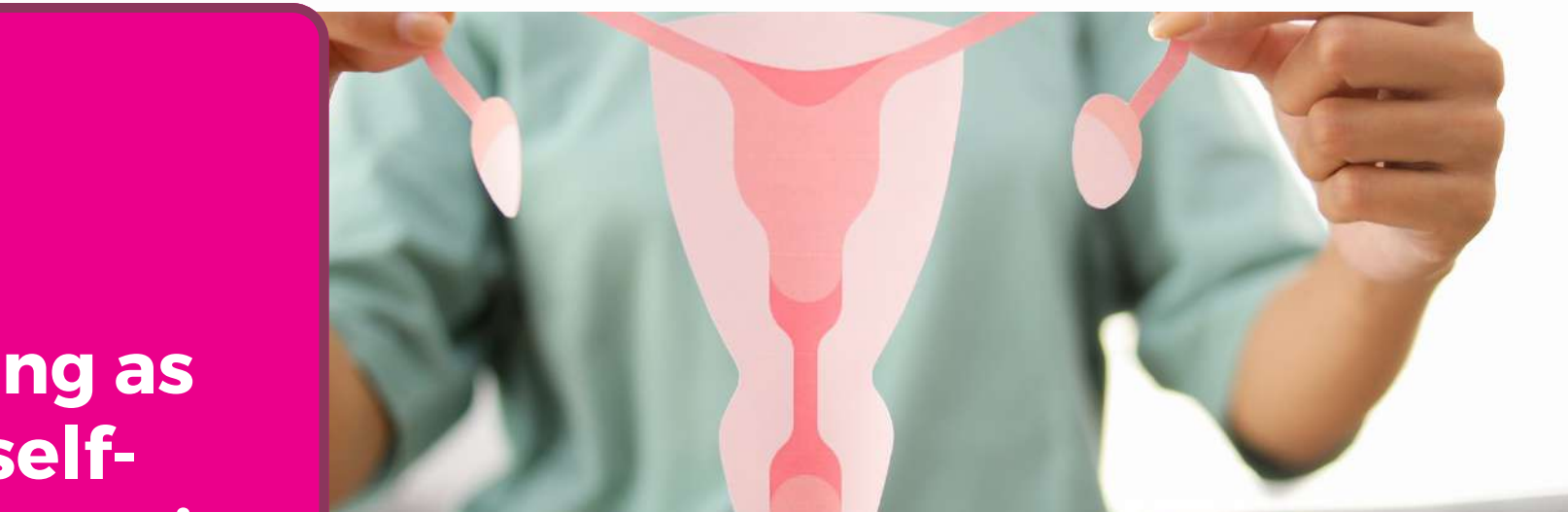
Most perimenopausal women identify resulting symptoms as having a sizable effect on their lives, but they typically aren't navigating this journey alongside a doctor, instead exploring their issues for themselves.

59%

report that perimenopause moderately-significantly impacts their daily lives

82%

of women identifying as perimenopausal self-diagnose, rather than turning directly to their practitioner



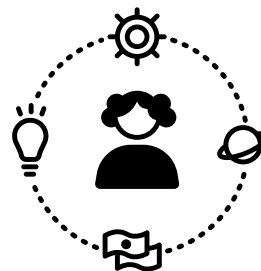
Many women start managing by doing research, changing routines, and tracking symptoms



Information-seeking and lifestyle changes lead the journey

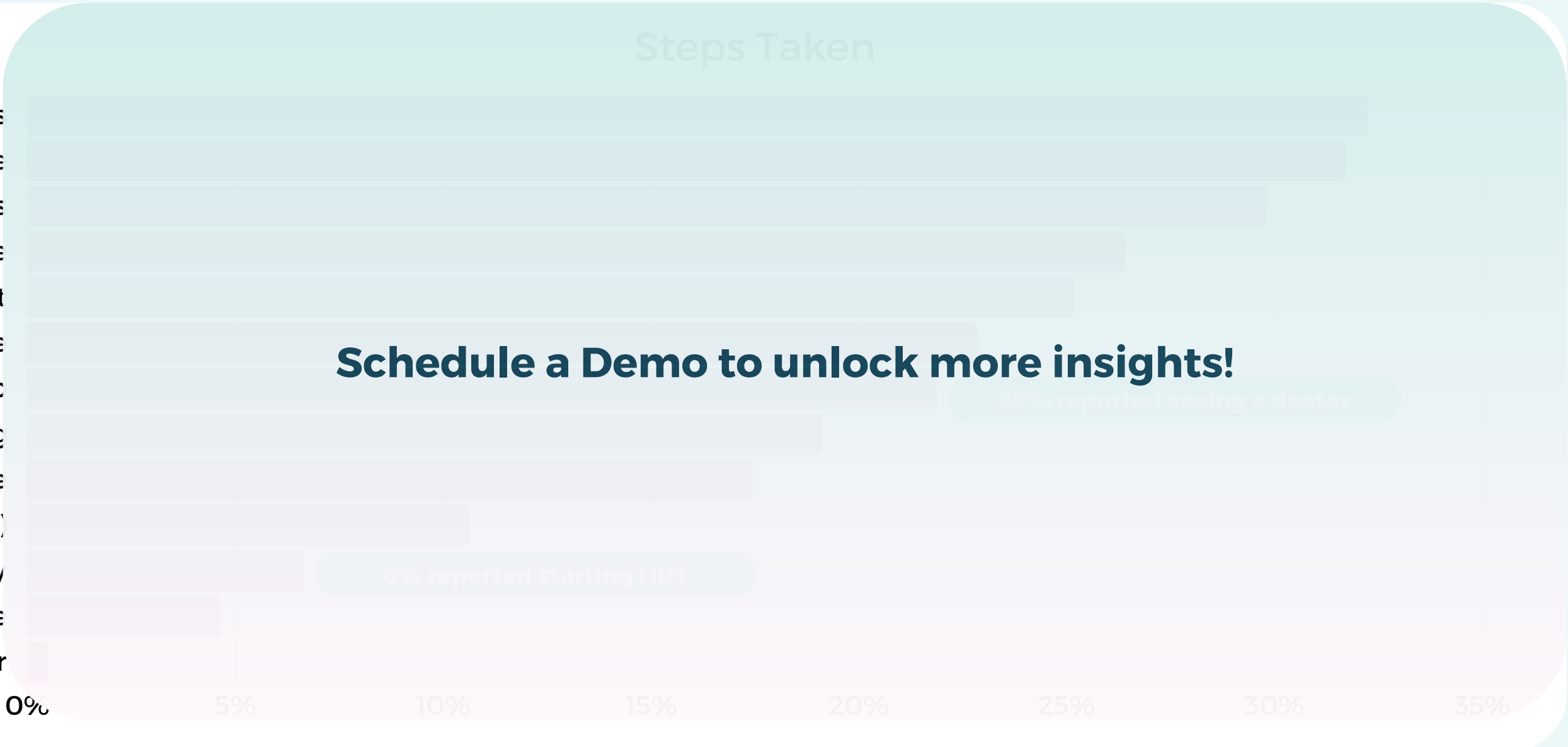


Clinical intervention is less common than self-directed steps



Initial action skews toward learning and adapting before medicating

- Started doing research on my symptoms
- Increased or changed exercise routine
- Keeping track of symptoms
- Made a diet change
- Tried a new supplement
- Take mental health breaks or meditate
- Went to a doctor to seek help
- I haven't done anything
- Stop/decrease alcohol intake
- Started a new medication (OTC or prescription)
- Started hormone replacement therapy
- I do not believe I am in perimenopause
- Other



Schedule a Demo to unlock more insights!

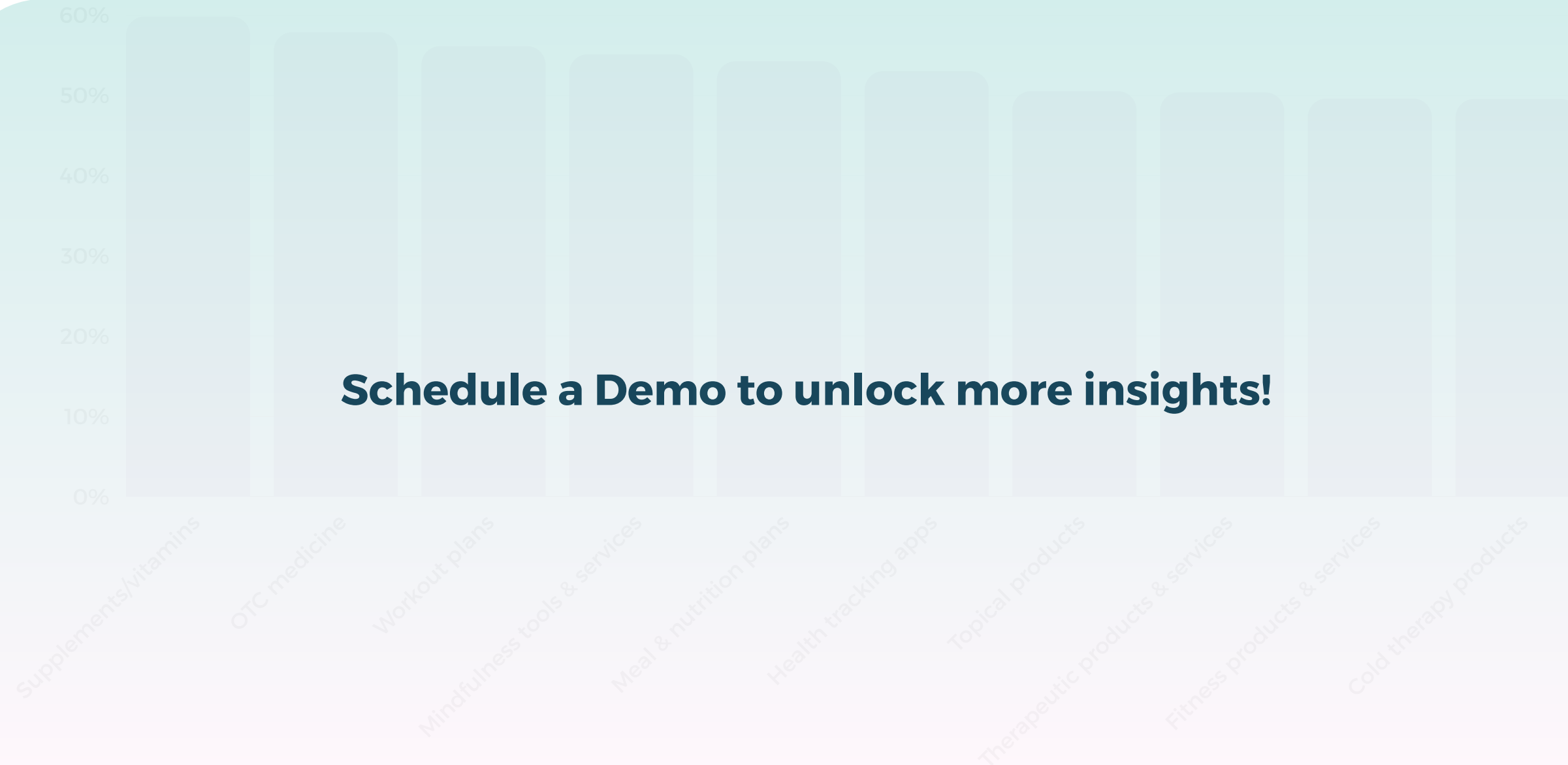
22% reported seeing a doctor

6% reported starting HRT

Most women are turning to supplements/medicines to assist, but interest in other options is high

Top Products Used for Perimenopause Management
Amongst Perimenopausal Women who reported a symptom

● Product/Services Used

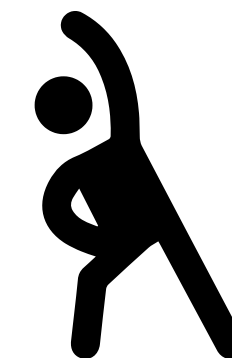


Schedule a Demo to unlock more insights!

How Women are Managing Perimenopause



Supplements and OTC medicine anchor most routines and have the highest openness.



Lifestyle tools are increasingly rivaling traditional options, with interest in meal/nutrition plans high

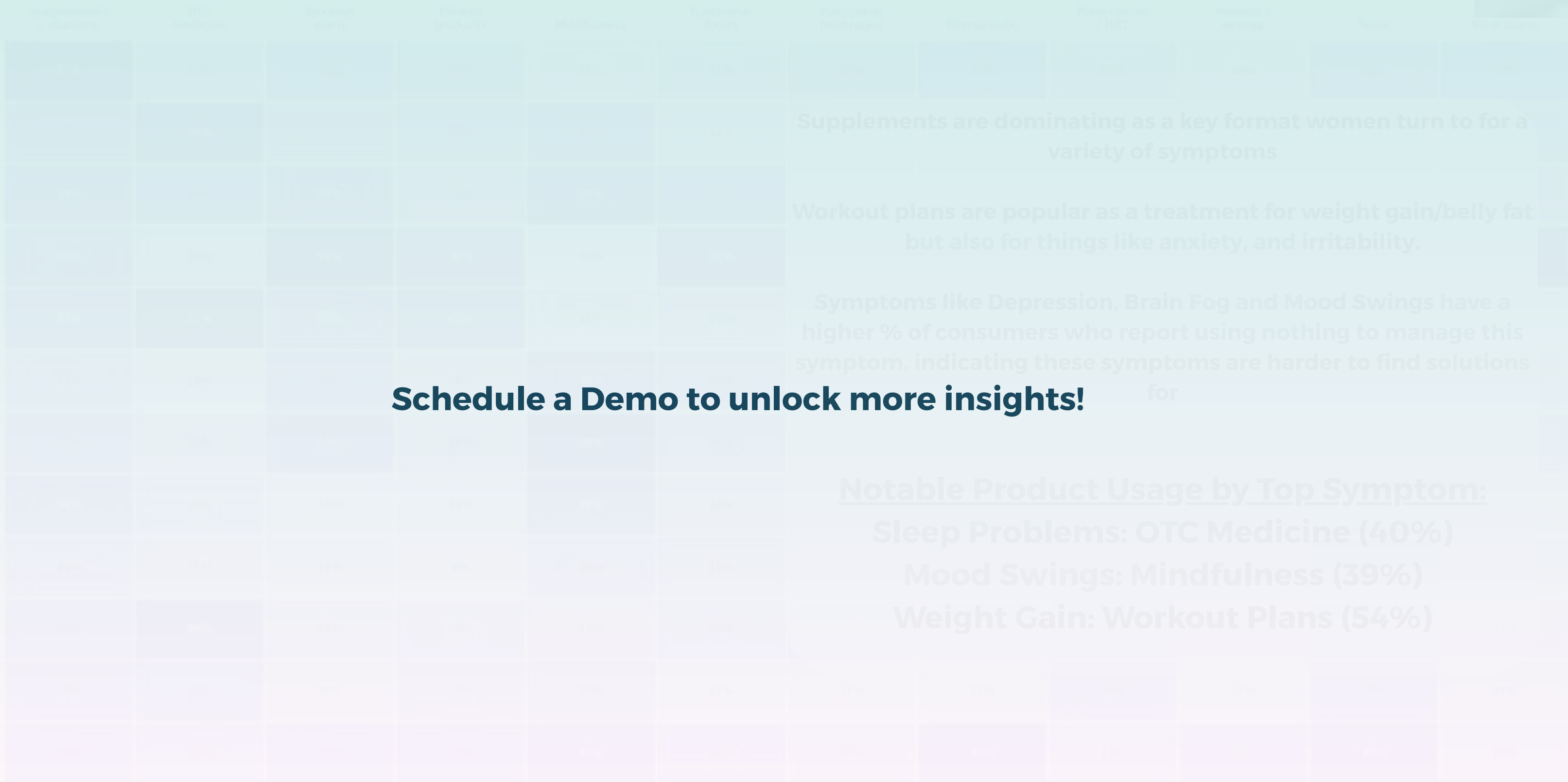


Openness signals interest in a diverse array of potential solutions

Product usage and interest varies by symptom



Top perimenopause symptoms: solutions women are already using



Supplements are dominating as a key format women turn to for a variety of symptoms

Workout plans are popular as a treatment for weight gain/belly fat but also for things like anxiety, and irritability.

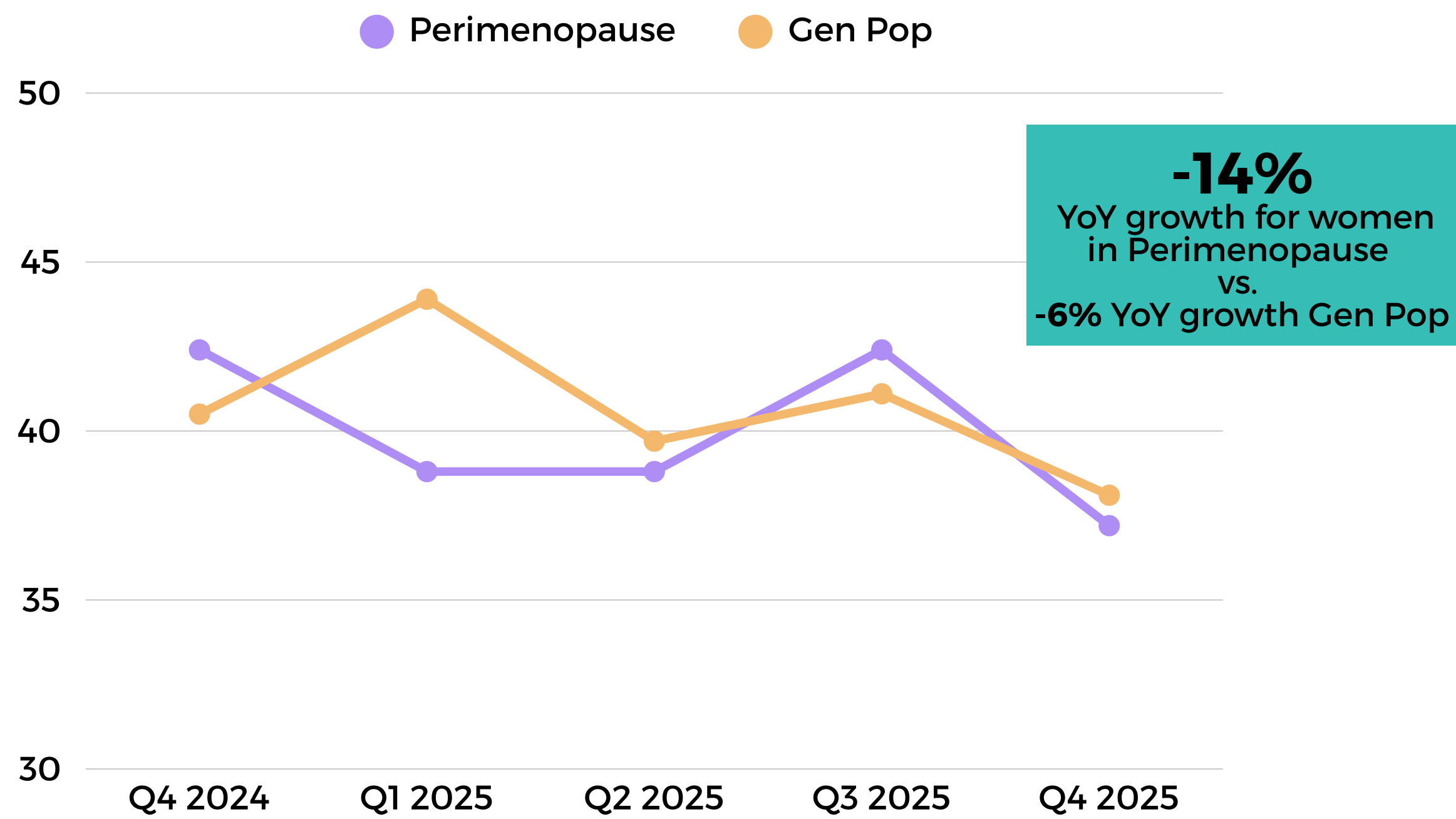
Symptoms like Depression, Brain Fog and Mood Swings have a higher % of consumers who report using nothing to manage this symptom, indicating these symptoms are harder to find solutions for

Schedule a Demo to unlock more insights!

Notable Product Usage by Top Symptom:
Sleep Problems: OTC Medicine (40%)
Mood Swings: Mindfulness (39%)
Weight Gain: Workout Plans (54%)

Source: Brightline Group, Wellness Consumer Insights, H2 2025; Total N = 11,244, Yes/Maybe Peri n = 734, Symptom Reporters N=718
(Supplements and OTC medicine dominate across nearly every symptom; workout plans and functional foods show consistent moderate usage)

Women in Perimenopause are reducing their alcohol usage more so than the general population



Alcohol Purchase (P3M)	YOY Growth Rate
Wine	-13%
Pre-mixed Cocktails (canned or bottled)	-18%
Flavored Malt Beverage	-48%
Beer	-50%
Spirits / Hard Alcohol	-82%
Hard Seltzer / Alcoholic Soda Water	-101%

Source: Brightfield Group; Wellness Consumer Insights; Q4 2024-Q2 2025 Total N = 27,367, Self-Identify as in Perimenopause Menstrual Stage N=1,110

How the Conversation is Evolving

Unpacking the nuance of perimenopause social conversations and how this can help brands reach consumers

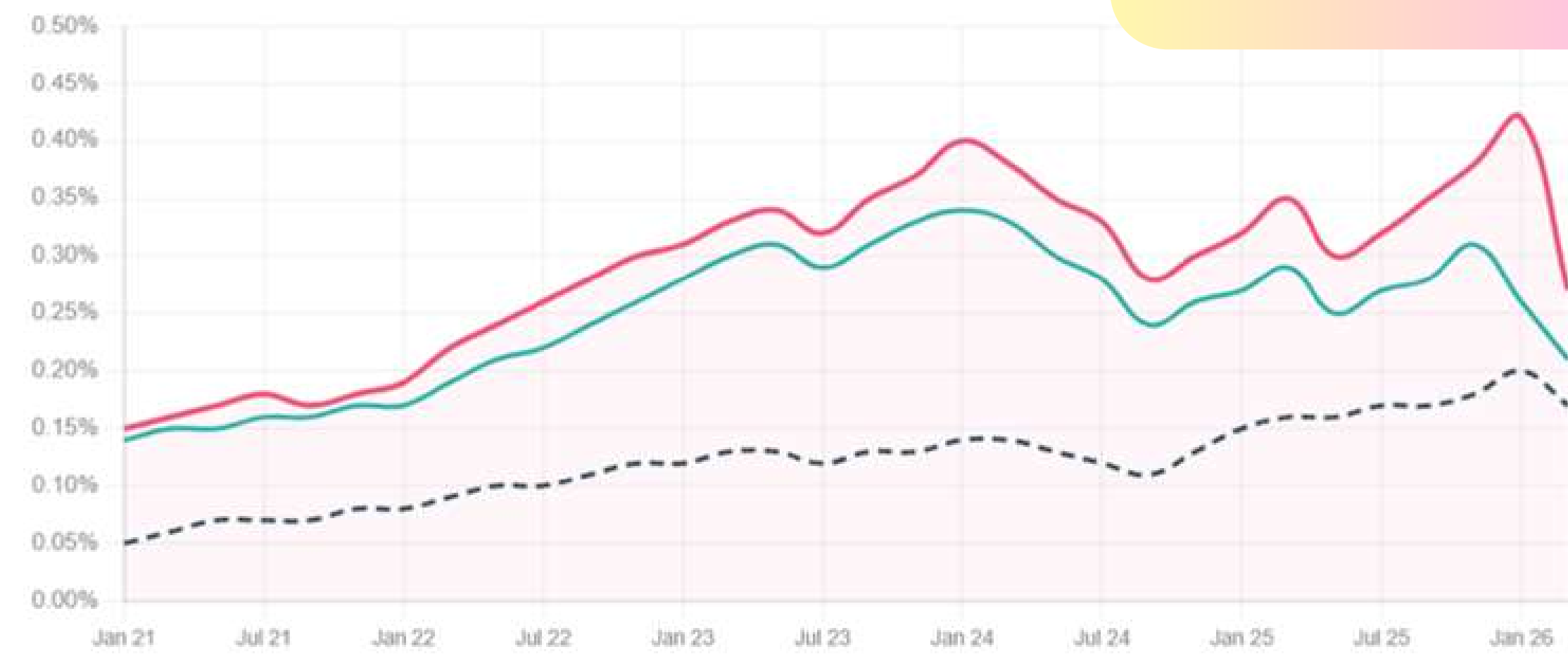
Women are naming the transition more accurately: perimenopause is rising as menopause normalizes

Brightfield Group's social listening data tracks over 100 million conversations from 2021 to 2026. Menopause mention rate has pulled back while perimenopause has climbed steadily.

Menopause is technically a single day. Perimenopause is years. The conversation is moving to where women actually live it.

Share of voice over time — perimenopause & menopause
Mention rate (%) across all categories · 2021–2026

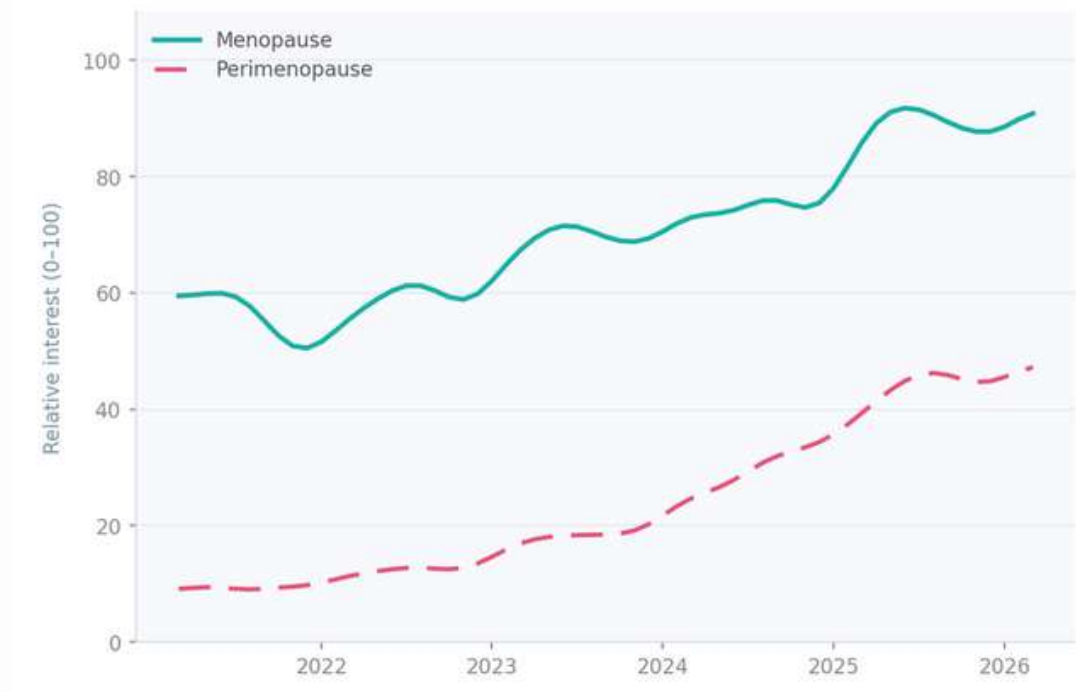
— Perimenopause / Menopause — Menopause --- Perimenopause



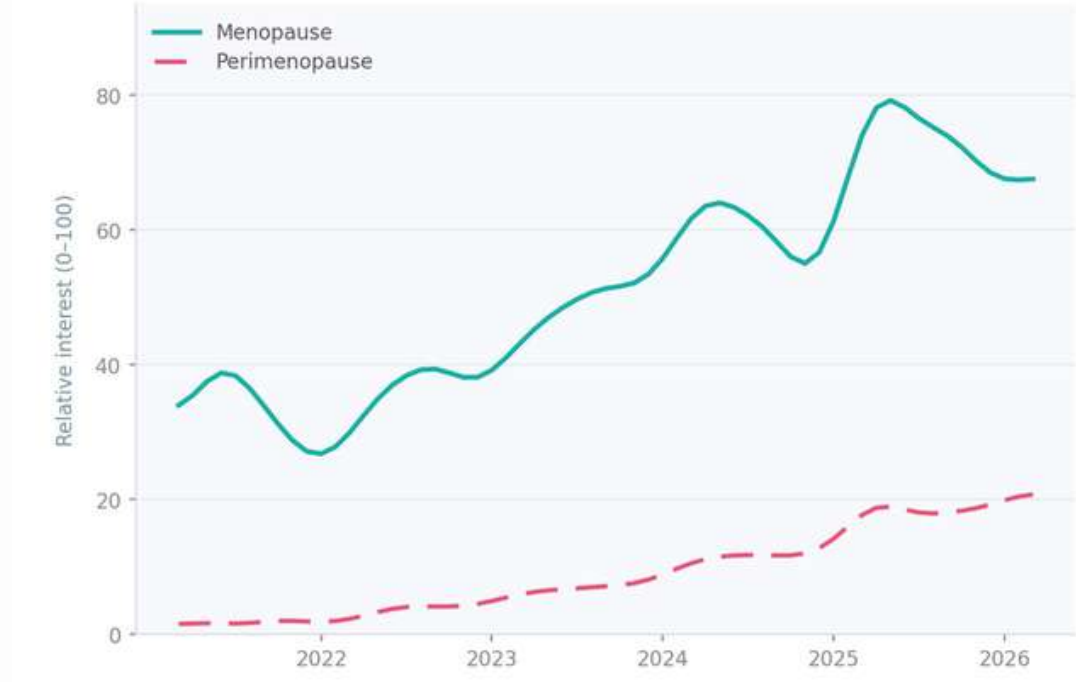
3.6% average Share of Voice, on par with discussions about Digestive Conditions



Google Trends



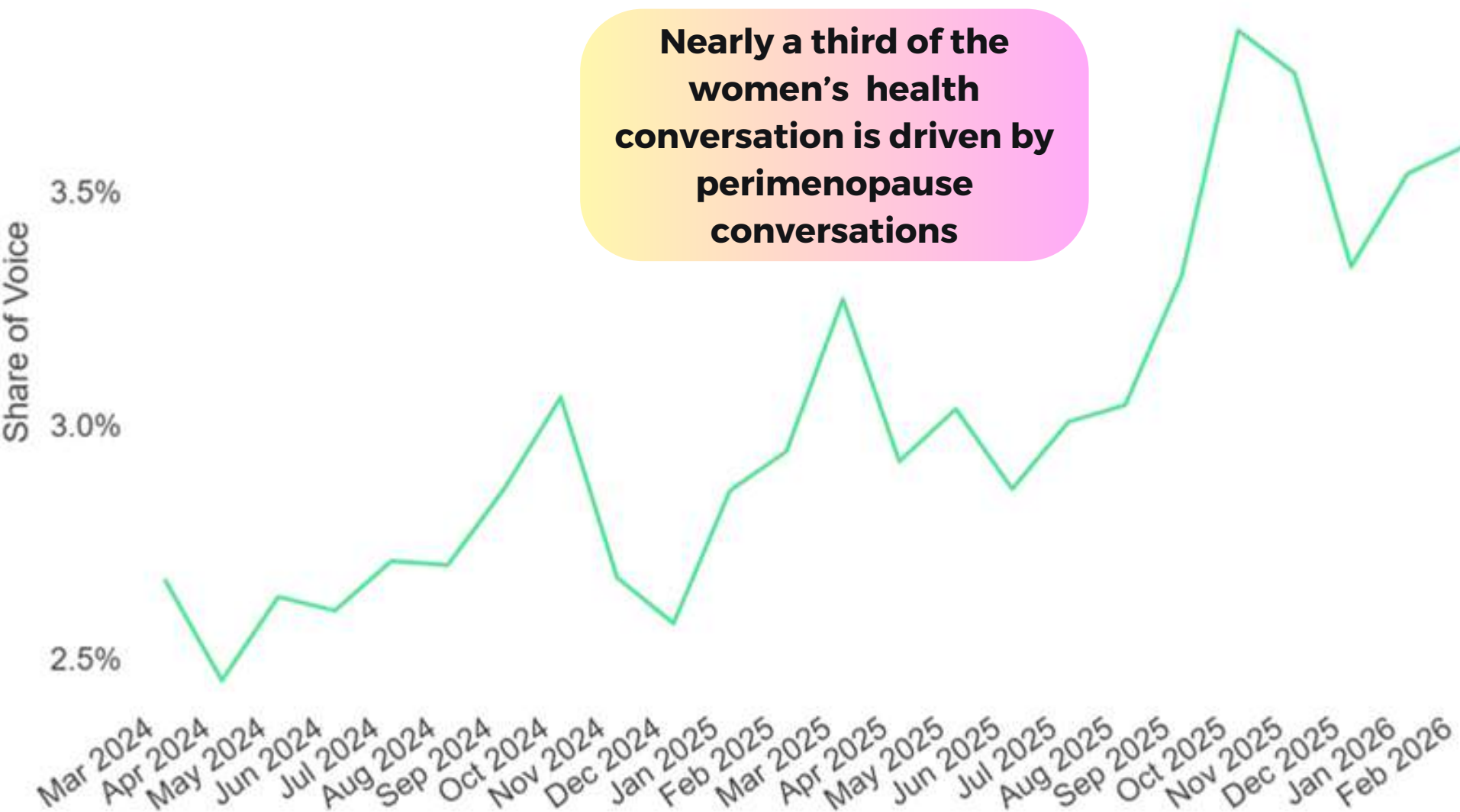
Youtube Trends



Women's health is growing broadly and women are getting specific about what they want from products.

Women’s health is up 35% in two years, with perimenopause now capturing nearly a third of the conversation. Within these conversations, women are getting more specific about what they want from solutions, as claims like “free from seed oils” (+704%), “microplastics” (+566%), “clinically backed” (+472%), and “clean label” (+438%) continue to surge.

Women’s Health



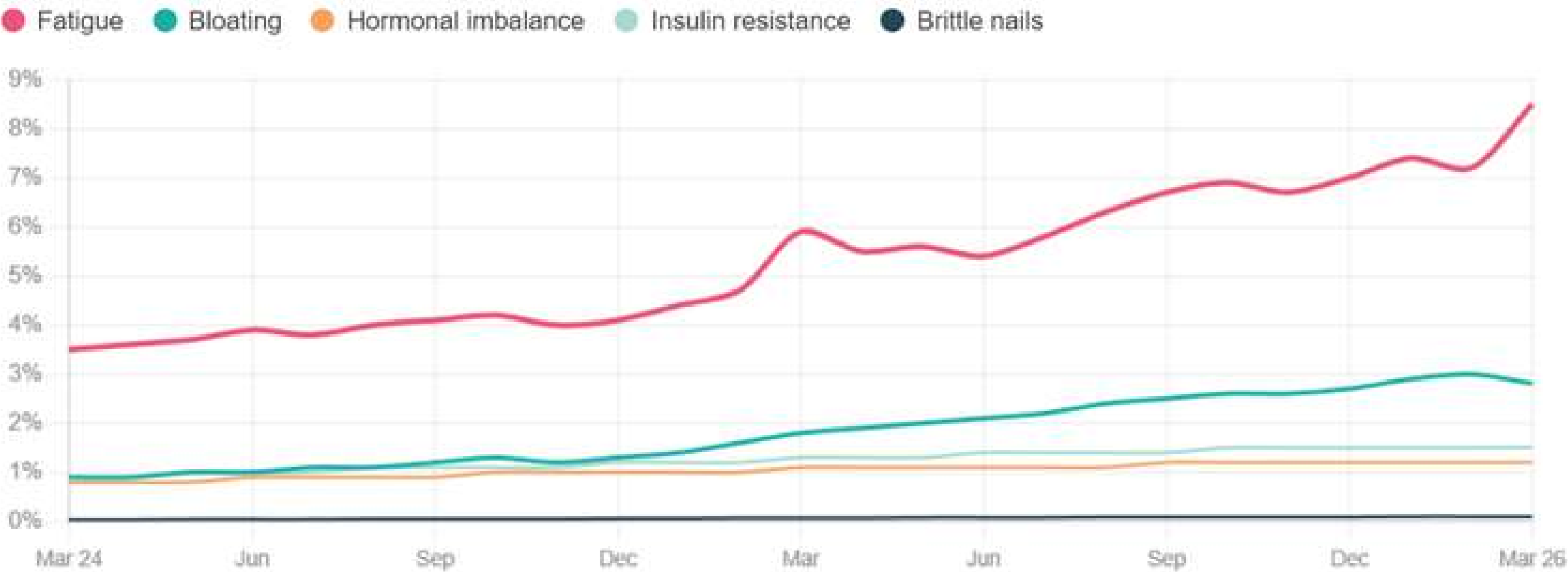
Claims within Women’s Health Conversations

Claim	SOV	Growth
Free from Seed Oils	0.24%	+704%
Microplastics	0.90%	+566%
Clinically Backed	5.86%	+472%
Clean Label	0.11%	+439%
Evidence-based	3.65%	+170%
Ultra Processed Foods	3.22%	+146%
Non-toxic	2.95%	+119%
Hormone Friendly	1.98%	+115%
High Protein	4.42%	+104%
Low Sodium	0.22%	+103%
Grassfed	3.71%	+54%

Source: Brightfield Group; U.S. Wellness Social Listening; March 2024-2026; Women’s Health n = 398,136

Growth signals show women talking about perimenopause as a whole-body experience

Share of voice by condition — Mar 2024 to Mar 2026



HIGHEST GROWTH RATE — 2-YEAR PERIOD

Brittle nails +290% 0.10% SOV	Bloating +200% 2.81% SOV	Fatigue +124% 5.41% SOV	Insulin resistance +60% 1.51% SOV	Hormonal imbalance +51% 1.20% SOV
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Source: Brightfield Group U.S. Wellness Social Listening · March 2026 · Perimenopause post n = 393,269



The language is shifting from “mood swings” to “mood management”

As the conversation matures, framing is becoming more actionable, holistic, and less negatively coded.

Mood swings — condition

Brightfield Group · Share of voice % · Apr 2023–Mar 2026

Peaked mid-2025 · declining · 0.08% SOV



Mood management — need state

Brightfield Group · Share of voice % · Apr 2023–Mar 2026

+81% growth · 12.8% SOV



Women increasingly frame this stage around management, support, and whole-body solutions.

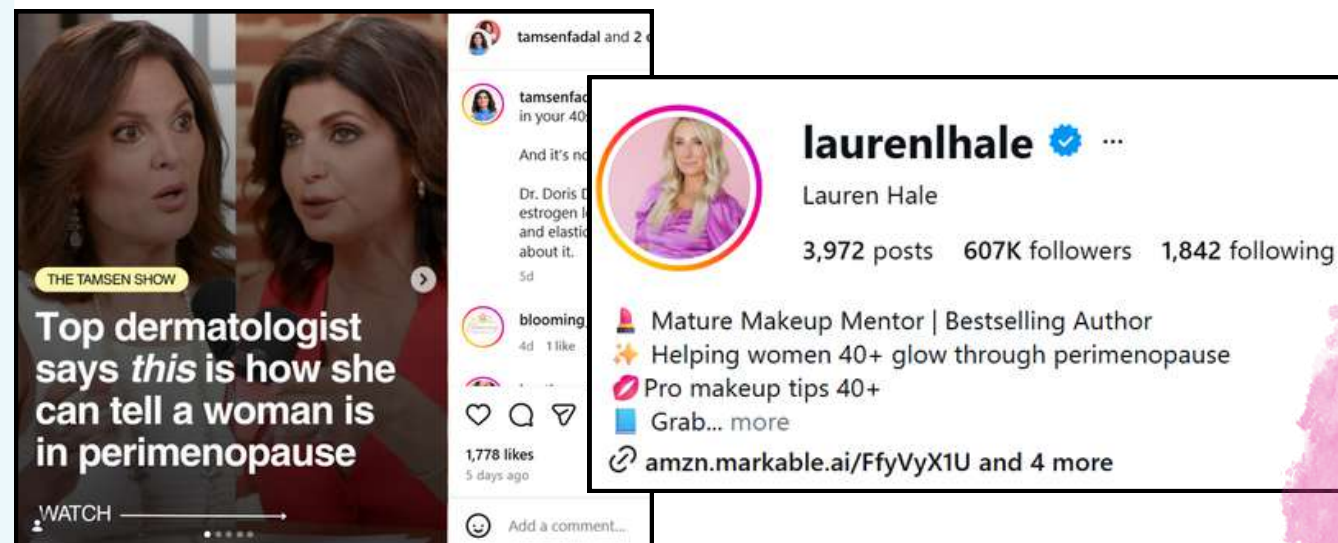
That matters for brands: the winning language is less about naming symptoms and more about helping women navigate them.

Source: Brightfield Group U.S. Wellness Social Listening · March 2026 · 1,722,638 selected / 27,062,705 total mentions

Different voices are shaping how perimenopause is understood

Different voices do different jobs: experts build trust, advocates translate, comedians normalize, and celebrities expand reach. The conversation then moves through a messy middle where women scroll, compare, comment, vent, joke, and validate what resonates.

Influential Advocates

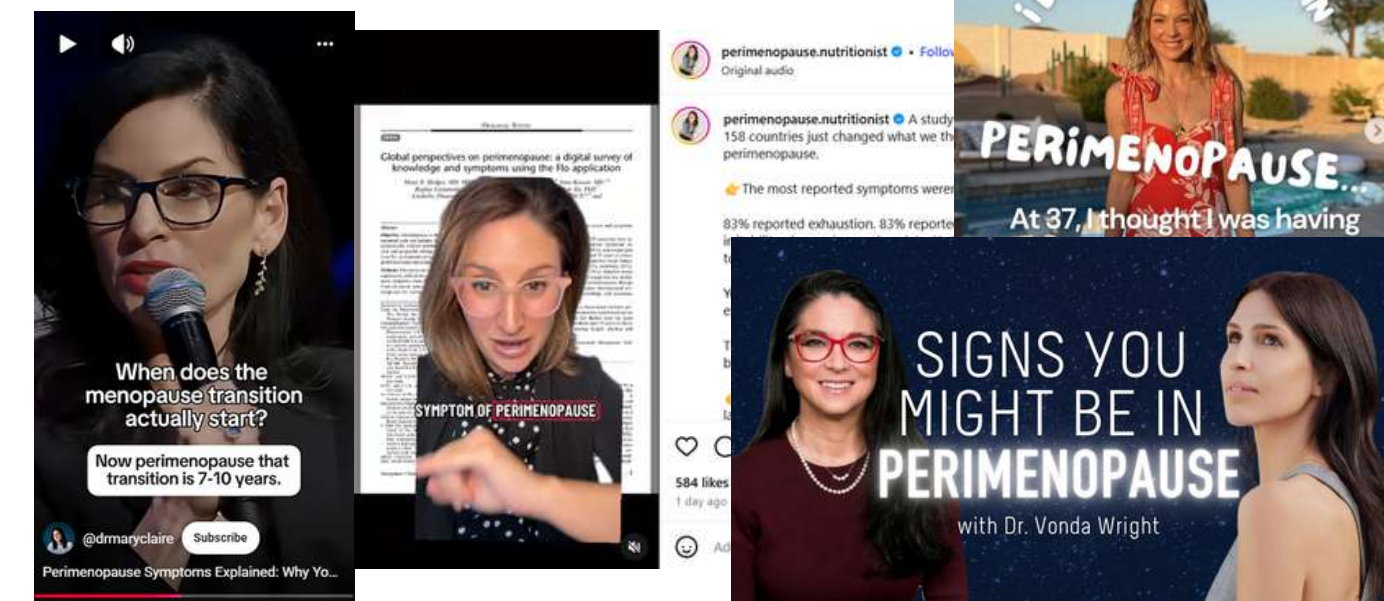


Real Women

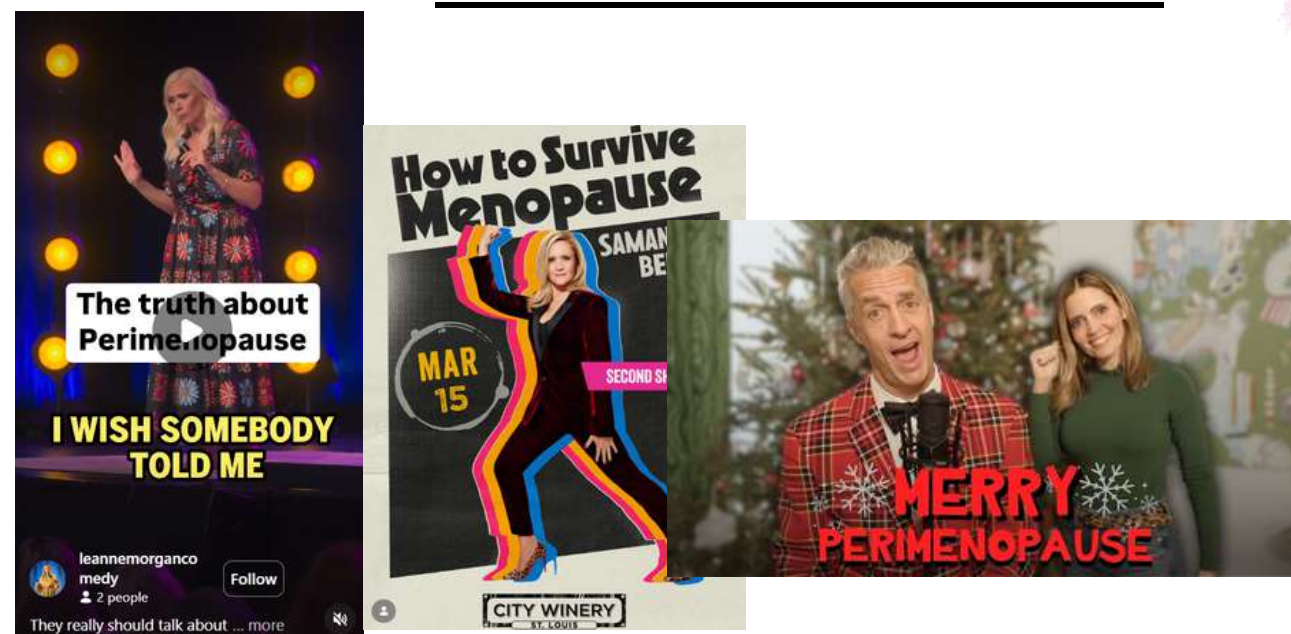
I am 47 and in perimenopausal hell. I can't figure out why no one warned me about this. No older females, no doctors, absolutely no one. About 2 years ago I started to feel off and started gaining weight.

Now, heavier, every single day there's something weird going on with my body. This morning, my left armpit smelled like onions 🍎😭😭 on top of getting a horrible period that resembles a crime scene. My mental state is a mess. I could go on... Lord help us all is all I can say! Much love to you all!

Certified Health Experts



Comedic Personalities



Hollywood Celebrities



Most conversation sits in a low-trust/low-passion zone; the voices that shift behavior tend to combine authority, authenticity, and emotional energy.

- **Dr. Haver is the standout.** The only voice combining top-tier authority and high passion.
- **Tamsen is the strongest non-clinical voice.** High authority and passion — the top advocate partner in the space.
- **Certified experts cluster toward credibility, not passion.** Strong authority signals with room to grow emotional resonance.
- **Celebrities amplify awareness but vary on authority.** High passion and reach — strongest for normalization, not clinical claims.



Takeaways: What Brands need to know about Perimenopause

01 - AWARENESS

Many women don't know they are in perimenopause

51% of Gen X & Millennial women rate their understanding low. 54% of "no/not sure" women still report 3+ classic symptoms. Confusion peaks among younger cohorts.



Less than 1/3 are confident about next steps

02 - SELF-NAVIGATION

Women are going it alone — and turning to brands first

82% self-diagnose rather than seeing a doctor. Research, exercise changes, and symptom tracking lead. Only 22% see a doctor; just 6% start HRT.



59% say it impacts daily life

03 - SYMPTOM BURDEN

Symptoms are real, diverse, and underserved

Sleep problems (47%), mood swings (45%), fatigue (42%), and brain fog (39%) top the list. Peri women are 2x more likely to report brain fog weekly vs. men.



42% dissatisfied with sleep product options

04 - PRODUCT OPPORTUNITY

Lead with solutions, not diagnosis

Supplements and OTC anchor most routines, but openness to lifestyle tools is high. Magnesium leads ingredient conversations; aloe vera and moringa are fastest rising.



Supplements used by ~60% of peri women

05 - SOCIAL CONVERSATION

The framing is shifting to solutions

Women's health SOV up +35% in two years. "Mood management" up +81% while "mood swings" declines. Certified experts carry authority; celebrities drive reach but lower trust.



3.6% avg. share of voice

2026 COMING SOON! DEDICATED WOMEN'S WELLNESS STUDY



Vitamins, Minerals & Supplements



Functional CPG Foods & Beverages



Beauty, Topicals & Personal Care



Feminine Health & Hygiene



Wearables & Devices

PRODUCT CATEGORIES INCLUDED IN THE SURVEY AND SOCIAL TRACKER PROVIDE A SPECTRUM OF CPG CATEGORIES THAT ALIGN WITH WOMEN'S EVOLVING NEEDS AND INTERESTS.



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