

Sleep, Stress, and Focus

Concept testing the most underserved needs in *functional foods*

A concept test study of speculative functional food products that address the most important but unmet needs in wellness.



About this report

As we established in our preceding report, **A Fragmented Category: Where is the Most Room for Innovation in Functional Foods?**, significant whitespace exists between available formats (such as ingestibles, bars, mixes, beverages, etc.) and underserved wellness-related jobs-to-be-done.

Our study found that while jobs like hydration, immunity, nutrition, and general bodily caretaking are extremely important, consumers feel they already have enough available, effective products to address them. Instead, **the most critical yet hardest problems for functional foods to solve are sleep, stress, and focus.**

So, we developed a speculative concept to screen for each opportunity.
The three ideas we tested are as follows:

			
Feature	Drift Away (Sleep)	Serene Stir (Stress)	Spark Focus (Focus)
Format	Gummy	Drink Mix (Powder)	Chewable Lozenge
Usage Timing	Nightly ~30 min before bed	Daily Stirred into coffee/tea/water	On-demand ~30 min before focus task
Key Benefit	Gentle sleep without grogginess	Calm without medication/sedation	Clarity and focus without jitters/crash
Hero Ingredients	L-theanine, Magnesium Glycinate, GABA, Valerian	Ashwagandha, Rhodiola, Holy Basil	Lion's Mane, Bacopa, Citicoline, Ginseng
Differentiator	Melatonin-free; no morning hangover	Cumulative adaptogen effect; ritualistic	Portable; fast-acting cognitive boost

All three concepts were priced at **\$29.99 for a 30-day supply** to eliminate value bias, allowing our findings to focus on format, routine fit, and key benefits.

Table of Contents

Study Overview	04
Concept Scorecard	06
Winning Concept	07
Why the Other Concepts Trail	08
The Value & Benefit Gap	09
Cross-Segment Performance	10
Conversion Depends on Confidence	11
Development Implications	12
Actionable Recommendations	16
More From Knit	17

The background of the entire page is a photograph. It shows several light blue, round pills scattered on a light blue surface. In the lower right foreground, a person's hand is visible, with the thumb and index finger holding one of the blue pills. The lighting is bright, creating soft shadows.

Study Overview

We surveyed 528 U.S. adults between the ages of 18-70. Our fielding design included 447 quant respondents and 81 AI-moderated video respondents (including one audio-only question). All 528 participants evaluated the three core concepts in a randomized sequential monadic loop before completing a forced ranking.

Our participant pool was highly category-active: 85.8% had purchased supplements in the past month, and 79.7% had recently purchased foods or drinks with added health benefits. The sample skewed Millennial at 42.2%, followed by Gen X at 27.5%, Boomers at 20.1%, and Gen Z at 10.2%. Gender was balanced overall with 45.6% men and 54% women.

528

US-based consumers surveyed

447 quantitative respondents

81 AI-moderated video respondents
(including one audio-only question)

Segment Approach

For this study, we divided audiences into three original segments that better represent consumers' varying relationships to functional foods than generation, gender, income status, or other traditional demographics.



Biohacker Optimizers

Consumers who actively employ functional foods in **daily or weekly life**

36%

of respondents



Reactive Relievers

Open-minded consumers who turn to functional foods **during specific times of need**

36%

of respondents



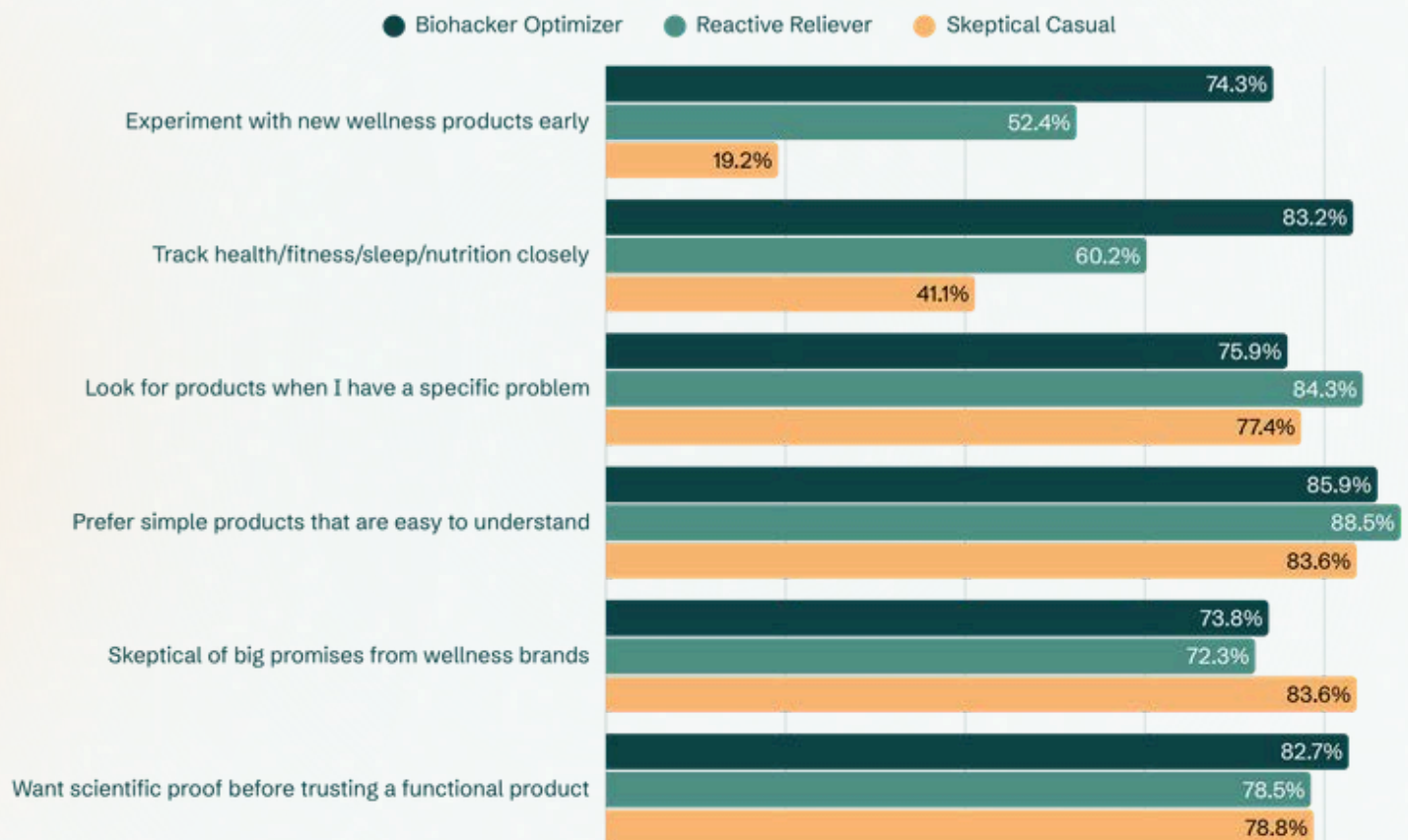
Skeptical Casuals

Consumers who casually enjoy functional foods but remain **wary of their promised benefits**

28%

of respondents

Attitude Profiling by Segment (Top-2-Box Agreement)



THE RESULTS

Concept Scorecard (Top-2-Box Agreement)

Across the three concepts, Drift Away emerges as the strongest overall performer, leading on appeal, purchase intent, credibility, routine fit, and first-choice share. Spark Focus and Serene Stir each show distinct strengths – particularly on uniqueness – but neither converts that differentiation into demand as consistently.

The scorecard below provides a side-by-side view of the core measures used to evaluate concept potential and highlights where each idea is strongest, where it trails, and where further refinement may be needed.



Metric	Drift Away	Serene Stir	Spark Focus
Appeal	80%	70%	72%
Purchase Intent	65%	57%	61%
Credibility	72%	64%	63%
Routine Fit	76%	70%	73%
Felt Benefit	62%	55%	60%
Uniqueness	61%	69%	70%
Price Value	55%	52%	55%
First Rank %	44%	27%	29%

Drift Away Wins

Drift Away was the clear winner of the three concepts. It posts the **highest Top-2-Box appeal at 79.7%, highest purchase intent at 65.3%, and the highest first-choice share at 44.1%**. This finding corroborates the results of our previous whitespace study, which found that **sleeping better was the hardest job for consumers to solve** with available functional foods and the greatest improvement priority.

*“Quality rest lays the foundation for overall well-being. Good sleep affects mood and focus the next day, making this **nightly routine product more essential** than daytime stress or focus supplements.”*



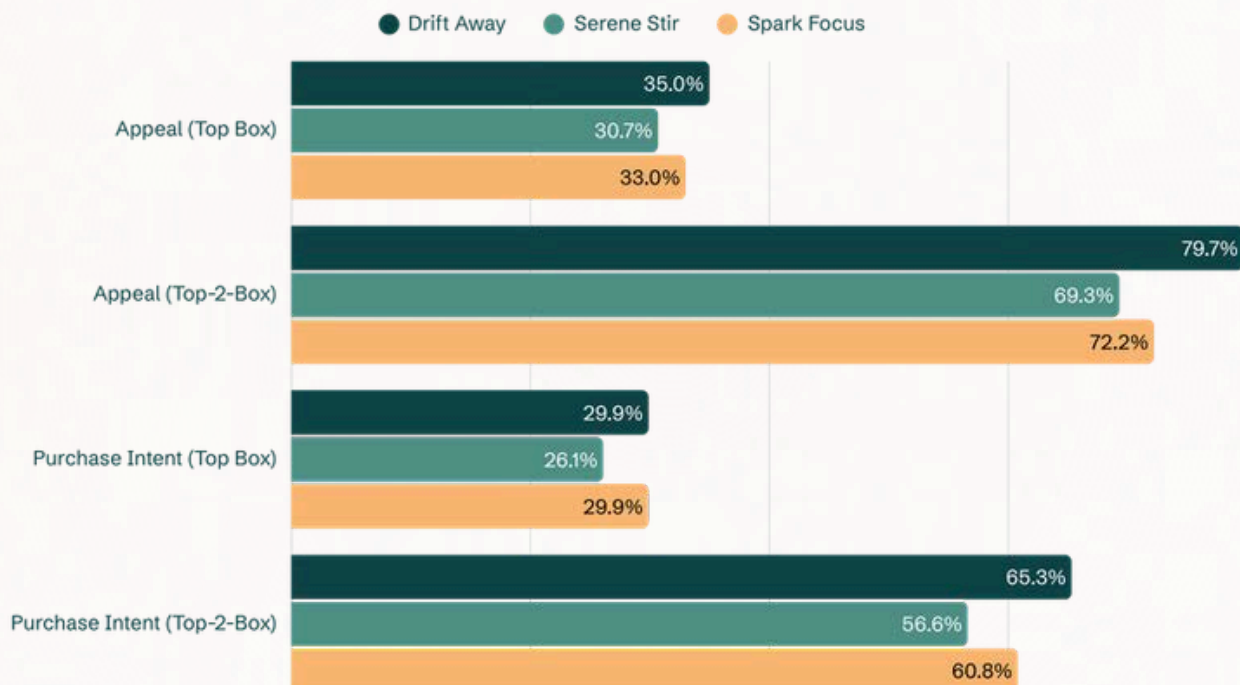
Female, 50 y.o.
Ranked Drift Away
as her first choice

Spark Focus ranked second at 72.2% appeal, 60.8% purchase intent, and 29.4% first-choice share. Serene Stir falls behind at 69.3% appeal, 56.6% purchase intent, and 26.5% first choice.

Drift Away’s appeal advantage is statistically reliable compared to both alternatives. In the forced-choice task also strengthens, rather than changes, the monadic story: Drift Away is the most resilient when respondents must choose only one concept. It captures 44% first-place share and is least likely to be ranked last at 26%, while Serene Stir is most vulnerable to rejection at 39% last choice.

Drift Away’s advantage is rooted in believability and personal need fit. Among respondents who ranked it first, the top reasons were need fit at 52.4%, noticeable benefit at 40.3%, and believable claim at 39.1% (its believable-claim reason is significantly higher than Spark Focus).

Cross-Concept Demand Scorecard: Appeal vs. Purchase Intent



Why Spark Focus Takes Second Place

Spark Focus has the most distinctive strategic asset: it leads on uniqueness at 69.7% T2B, slightly ahead of Serene Stir and, notably, significantly ahead of Drift Away at 61.2%. It also matches Drift Away on purchase intent, even though it trails on broader appeal and first-choice share.

We found that Spark Focus's main issue is conversion quality, not concept clarity. It's easy to understand at 82.6% T2B and has strong routine fit at 73.5%, but its believability is lower at 63.4% and only 60% of respondents believe they would actually notice or feel a benefit.

Qualitatively, Spark Focus lands on its intended job but triggers proof and value doubts. **The largest open-end theme we coded is Price and Value Concerns at 28.4%** of tagged respondents, while Focus and Cognitive Performance Appeal is 24.8%, Clean Energy & No-Crash Benefit is 23.5%, and Efficacy Skepticism & Demand for Evidence is also 23.5%.

This creates a clear refinement path: if this product were being considered for real development, it would be wise to preserve the on-demand focus and no-crash promise, but make the efficacy, ingredient, and safety story more concrete.



Why Serene Stir Takes Last

Serene Stir's strongest assets are uniqueness, routine fit, and emotional benefit language (scoring 68.9%, 70.5%, and 79.9%, respectively), and its leading qualitative theme is Stress and Emotional Regulation Appeal at 31.3% with strongly positive sentiment.

However, those assets don't convert strongly enough into demand. **Serene Stir ranks last on purchase intent at 56.8%,** first-choice share at 26.5%, value at 51.9%, and felt benefit at 55.3%. It also has the highest last-choice rate at 39.0%.



The concept's cumulative adaptogen framing appears to be the main source of doubt.

Gradual/Cumulative Effect Perception appears in 14.8% of Serene Stir qualitative reactions and leans negative, with respondents raising concerns about slow results, trust, and commitment. This suggests the drink-mixing ritual is appealing, but the delayed payoff (which, again, is hypothetical; the 30-minute delay was chosen for realism's sake rather than testing a "miracle" product that provides instant relief) needs to be reframed or substantiated before the concept can compete.

No Concept Fully Closes the Value and Felt-Benefit Gap

Current category perceptions are relatively strong:

77.3% of respondents agree that their current functional wellness products provide good value for their money, and 76.3% believe they clearly notice or feel the benefits. However, concept value scores are 54.9% for Drift Away, 51.9% for Serene Stir, and 55.5% for Spark Focus; concept felt-benefit scores are 61.7%, 55.3%, and 60.0%, respectively.

Drift Away comes closest on felt benefit and believability, but even the lead concept is not fully optimized. Drift Away leads on believable benefit at 71.6% T2B and felt benefit at 61.7%, with statistically reliable believability advantages compared to both alternatives and a felt-benefit advantage versus Serene Stir.

Price is a universal friction point rather than a concept-specific rejection. The share saying the price feels at least somewhat expensive is 48.5% for Drift Away, 45.8% for Serene Stir, and 47.3% for Spark Focus. Cost is the top-stated barrier for all three concepts at roughly 37%.

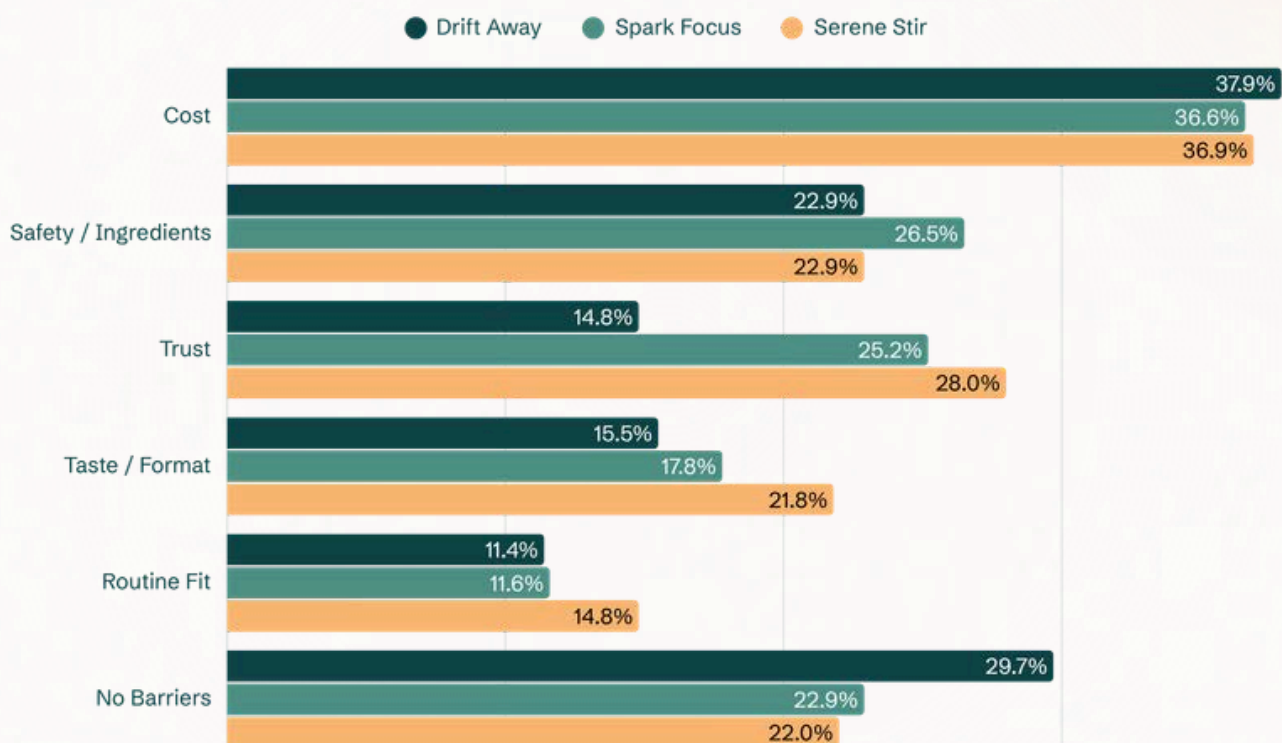
One participant noted, “\$29.99 for a 30-day supply is a bit expensive, but if it delivers great results, then it's all worth it.”



37%

Cost is the #1 barrier across all three concepts.

Top Purchase Barriers by Concepts



Drift Away is for Everyone

Predictably, all three concepts score the highest with Biohacker Optimizers and weakest with Skeptical Casuals (interestingly, however, Biohacker Optimizers ranked Drift Away equally as Serene Stir when it came to top-choice share).

Drift Away is the broadest option because it holds strong appeal among both Biohacker Optimizers and Reactive Relievers and wins top-choice share among Reactive Relievers and Skeptical Casuals. Sleep is chosen first by 49.7% of Reactive Relievers and 49.3% of Skeptical Casuals, while Stress over-indexes with Biohackers and Focus does not show meaningful top-choice differences by segment.

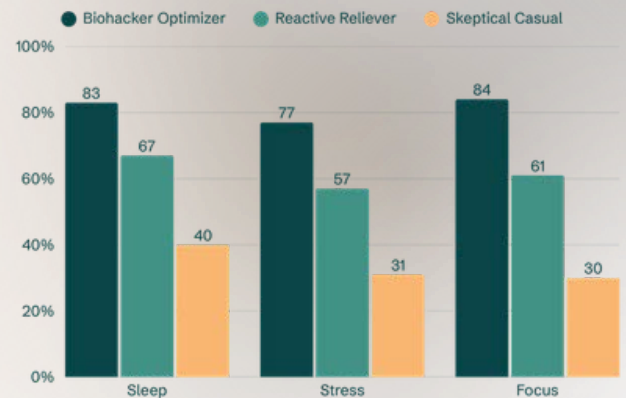
Spark Focus is highly attractive to Biohacker Optimizers, but its broader market risk is evident in the drop-off among Reactive Relievers and Skeptical Casuals. This is especially important because **Biohackers are not the gating audience: they are receptive to all three concepts, while broader success depends on converting more problem-led and skeptical users.**

Skeptical Casuals require the heaviest reassurance. One 66-year old male Skeptical Casual said trust and purchase require proof and a firsthand test, not paid claims.

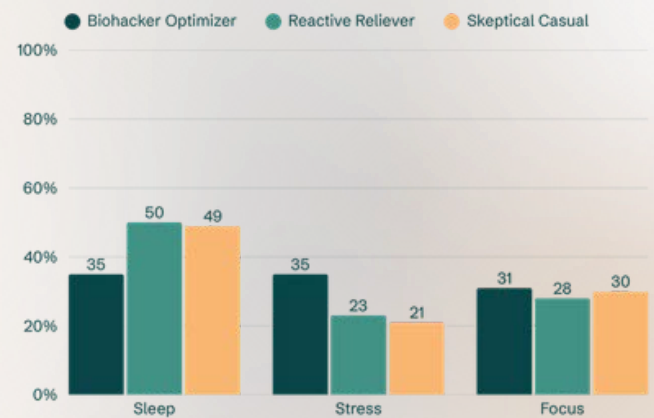
"A reputable scientific community means... [they] can do double-blind and triple-blind experiments, and other researchers can back up whatever they've found."

Among this segment, all three concepts are understandable, but value scores remain low at 29% for Sleep, 29% for Stress, and 32% for Focus, while the \$29.99 price is viewed as expensive by roughly two-thirds or more. Sleep is still the strongest option for them because it leads on believable benefit, relevance, routine fit, and clarity, and has the lowest trust barrier.

Purchase Intent by Concept



Top-Choice Share by Concept





Conversion Depends on Confidence

The top stated reason for choosing any winning concept is personal need fit at 48.9%, followed by convenience/ease at 38.6%, noticeable benefit at 38.4%, believable claim at 34.1%, and daily routine fit at 33.7%. Value is much less likely to be selected as a reason for top choice, at 17.8%.

Open-ended conversion conditions show the same logic. The leading purchase-conversion theme is Purchase Confidence & Positive Belief at 43.2% of tagged respondents, followed by Functional Benefit Expectations at 31.3%, Skepticism About Efficacy at 27.7%, Demand for Proof & Validation at 23.5%, and Safety/Side Effects/Medication Concerns at 19.0%.

What does this mean? Respondents need to feel confident a product will work as advertised before converting; simply liking the idea isn't enough to trigger purchase intent. Concept optimization shouldn't focus narrowly on awareness, format appeal, or even uniqueness. The next development phase must reduce trial risk by clearly showing what the benefit feels like, when it happens, why the ingredients are credible, and how the price is justified.



43%

Confidence is the #1 condition for purchase conversion.

Key Conditions for Purchase Conversion





THE RESULTS

Concept-Specific Development *Implications*

Though these concepts are speculative, these are the development implications we would note if an R&D, consumer insights, or marketing team was genuinely researching their competitiveness and feasibility.



Advance Drift Away, But Strengthen Value Proof and Differentiation

Drift Away already has the strongest overall profile across T2B appeal, purchase intent, believable benefit, felt-benefit, routine fit, and message clarity. Its weakest diagnostic is value at 54.9%, and its primary barrier is cost at 37.9%.

Qualitatively, Drift Away's strongest positive hooks are natural ingredients, no morning grogginess, melatonin-free differentiation, and non-habit-forming positioning.

Its largest negative themes are price/value concerns and efficacy skepticism, indicating the concept is credible enough to advance but still **needs stronger proof and value framing**.

The mockup should preserve the simple bedtime cue and melatonin-free message while making **three refinements**:

- 1 Clarify why the ingredient stack should work,
- 2 Make the no-grogginess benefit highly visible, and
- 3 Add trial/value cues that make \$29.99 feel less risky.

*"I suffer from restlessness, so I'm looking for a natural gummy that can **dissolve in my system easily** and not give me the same side effects that some melatonin products, which are hallucinations and jitters," one 50-year-old man said.*



Male, 50 y.o.



Spark Focus: Refine Proof, Safety, and Use-Case Specificity

Spark Focus is the best secondary opportunity because it combines solid demand with the strongest distinctiveness: 60.8% purchase-intent, 72.2% appeal, and 69.7% uniqueness. It is especially strong among Biohacker Optimizers, where purchase-intent reaches 84.3%.

The refinement burden is proof-led. Spark Focus has lower credibility than Drift Away, higher safety/ingredient concerns at 26.5%, and a trust barrier of 25.2%.

Qualitative reactions reinforce that respondents like the focus, clean-energy, no-crash, and portable/on-demand ideas, but they **question whether the product will work and want clearer evidence, dosage, formulation, and side-effect information.**

The next version should make the cognitive benefit more concrete:

- 1 Define the primary use occasion
- 2 Clarify expected onset and duration
- 3 Explain why the ingredient system is safe and effective
- 4 Consider trial formats to reduce commitment risk





Serene Stir: Substantially Rework Before Investing Further

Serene Stir has a usable platform but not enough conversion power. It scores well on uniqueness at 68.9%, routine fit at 70.5%, and clarity at 79.9%, yet trails on purchase intent, value, felt benefit, and first-choice share.

The core issue is that the concept is appealing as a calming ritual but under-proven as an outcome. Its top qualitative strengths are stress/emotional regulation appeal and drink-mix convenience, while its main doubts are price/value, efficacy skepticism, ingredient transparency/safety, and negative reactions to gradual/cumulative effects.

If retained, **Serene Stir should be repositioned around a clearer, more immediate-feeling benefit without implying sedation or emotional blunting.**

The drink-mix experience also needs more concrete sensory and usage guidance, because **Serene Stir has the highest taste/format barrier among the three concepts.**

(HYPOTHETICAL)

Actionable Recommendations

1

Advance Drift Away into mockup development as the lead concept.

Keep the core sleep proposition intact, but make the mockup work harder on value, ingredient credibility, and no-grogginess differentiation. Drift Away is the only concept that combines category-leading demand, credibility, felt-benefit expectation, clarity, and cross-segment resilience

2

Retain Spark Focus as a secondary concept, but do not move it forward unchanged.

Prioritize proof of noticeable focus, ingredient safety, and timing clarity before mockup testing. Spark Focus has real upside because it leads on uniqueness and performs strongly with Biohacker Optimizers, but it needs to broaden beyond early adopters by reducing trust and safety friction.

3

Deprioritize Serene Stir unless the proposition is reworked.

Preserve the calming ritual and drink-mix convenience, but rebuild the benefit story around clearer efficacy, less ambiguous timing, and stronger trust cues. Serene Stir's current execution is differentiated but under-converting, with the highest last-choice rate and highest trust and taste/format barriers.

4

Treat price as trial-risk reduction, not just affordability.

Across all concepts, roughly half view \$29.99 as expensive and cost is the leading barrier, while current category products are rated higher on value than any tested concept. The next phase should test smaller trial packs, money-back guarantees, proof-forward packaging, and clearer value math tied to 30 days of use.

5

Build a shared proof architecture, then flex the tone by segment.

Use mechanism, dosing, and timing cues for Biohacker Optimizers; concrete problem-solution relief language for Reactive Relievers; and plainspoken reassurance, reviews, safety cues, and lower-risk trial messaging for Skeptical Casuals. Segment data shows Biohackers are already receptive, while Skeptical Casuals are the major barrier to broader adoption.

6

Use respondent video assets to pressure-test and communicate the stage-gate decision.

Create reels (compilations of audio and video responses unique to Knit's platform) that show Drift Away's natural/no-grogginess appeal and price/proof doubts, Serene Stir's ritual appeal and trust concerns, Spark Focus's clean-energy/on-demand appeal and efficacy skepticism, and cross-concept choice rationale around personal need, format, and ingredient credibility.

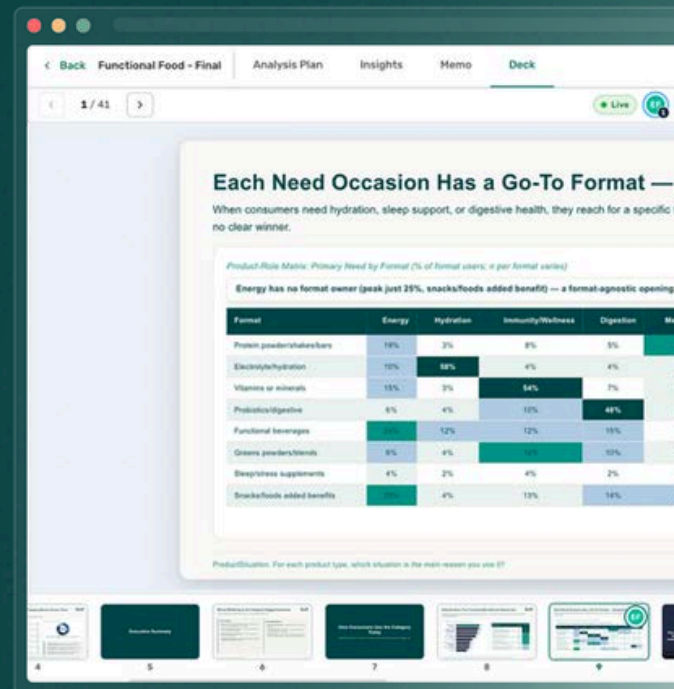
From Whitespace Exploration to Concept Test

With Knit, it's easy to explore whitespace in your industry, discover the opportunities with the greatest potential, and immediately concept test the results. Timelines with traditional agencies or DIY tools would take months, but the AI-Native Research Agency makes it possible to have screening verdicts within a matter of weeks. With Knit, you can guide product development from idea to launch faster than ever before with more confidence and market validation.

Want to see how we initiated, fielded, and analyzed these two studies? One of our research experts would be happy to walk you through our findings and what they could mean for your organization, as well as demonstrate how Knit can take your active whitespace project to concept test without sacrificing rigor — no commitment required.

Discuss the Concepts You'd Like to Test with a Research Expert:

goknit.com/book-a-demo



TIMEX®

If you'd like to learn more about how **Knit has helped other enterprise organizations run concept tests**, check out our case study with famous timepiece manufacturer, Timex, which validated a multi-season roadmap in only six weeks.

Read the Case Study:

goknit.com/case-studies/timex

Research Report Contributors:

This report is based on original research run through the Knit platform. Here are the contributors who helped give it a bit of polish to make it more enjoyable and useful as you peruse.



CONTENT
Jacob Yoss



RESEARCH
Dana Bishop



DESIGN
Banks Growth & Creative

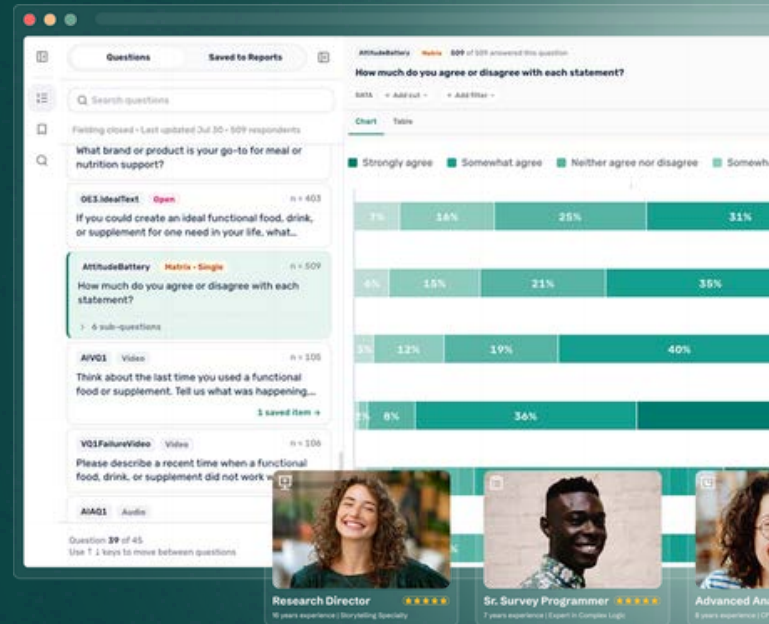


Knit is the AI-Native Research Agency helping insights teams move from scoping to story in a week or less.

Knit combines the rigor of working with real research experts with the speed and efficiency of AI. Through Researcher-Driven AI, Knit's researchers ground the AI in sound methodologies and bring business context to every project, so teams get agency-quality insights they can confidently share with stakeholders — not generic AI outputs they need to rework.

Knit supports quantitative and qualitative research in a single study across a wide range of use cases, from concept testing to brand strategy to customer segmentation. With access to vetted respondents, AI-moderated video, transparent analysis, and decision-ready reports, Knit helps insights professionals operate at the speed of the business without sacrificing rigor.

Learn more at goknit.com.



TRUSTED RESEARCH PROVIDER FOR THE WORLD'S BIGGEST BRANDS



Get more research reports like this one at: goknit.com/resources/reports

See how the world's best brands are leveraging Knit at: goknit.com/case-studies

Get a full demo of Knit at: goknit.com/book-a-demo

