

2023 TRENDS TO WATCH

Winding Down & Amping Up




August 2023

About Brightfield Group

Brightfield Group's AI-driven consumer insights and social listening help marketing and innovation teams see the person behind the trend.

Informed by predictive AI integrated with **survey** and **social media data**, our data has the answers innovators need to make decisions confidently.



Problem	Solution  BRIGHTFIELD GROUP	Outcome
<u>I need more customers</u>	Category-specific consumer insights across brands and channels	Double your customer base!
<u>I don't know what product to develop next</u>	Social listening into trending products, flavors, and ingredients + actual consumer adoption across trendy & traditional segments	New product development that is 10x more efficient!

Background: Here at Brightfield Group, we are always keeping a close eye on trends in the wellness and CPG industries. Our general population research combined with social listening provides us with an in-depth view of American attitudes and purchasing habits, allowing us to verify the strength and longevity of trends.

In this report, we'll explore ongoing wellness trends with Brightfield Group's social listening and consumer insights data. By verifying real-life trends with insights, companies are equipped to make decisions that resonate and drive success.

Data Sources Used in this Report

Brightfield Social Listening Data

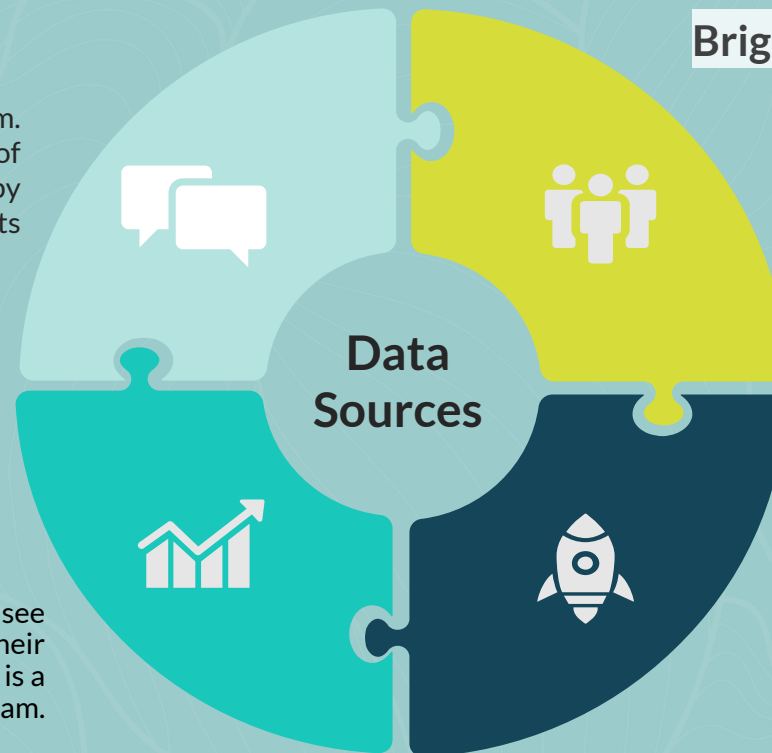
We collect social data from Twitter and Instagram. Data collection approach is built on a library of wellness-focused hashtags and topics created by our team of experts

Brightfield Consumer Insights Survey

We field this survey quarterly among a nationally representative sample of 5000 Americans. The survey has deep insights on wellness products across psychographics, usage, brand affinities, and more.

Google Search and Pinterest Trends

We often look to Google Trends and Pinterest Trends to see what consumers are searching for and pinning to their boards. This provides insight into whether something is a niche trend or is becoming mainstream.



Trend Reports and Traditional Media

We stay up to date with all the exciting top trends to watch in wellness and CPG. These inspire us to look for evidence in our data and capture these emerging trends.

Wellness Survey Segment Overviews

Throughout this report, we reference our consumer segments from our general population survey. Here is a brief overview of these segments. The data in our dashboards can be cut by these segments in order to see how their attitude, behaviors and product usage differ. These segments came from a total U.S. population mixed-methodology segmentation we conducted in 2021.

Trendy Enthusiasts 10%

These trendsetters are total **cutting edge wellbeing gurus** – they are focused on bettering their mind, body, spirit and the planet with all the latest fads available.

- High income, Millennials
- Focused on mindfulness, gut health and whole-body wellbeing
- Most stressed segment
- Like convenient foods and meal kits
- Highly active on social media – especially Facebook and YouTube

Better-Way Believers 26%

Wholesome idealists are focused on **bettering their bodies** and the planet through "**the right way**", "the better way", "the traditional way" or trying new "proven ways"

- Female and more likely to be Gen Xer or Boomer
- focus on eating a wholesome, "real", "free-from" natural foods
- Eating healthy comes easier to them
- Into alternative and natural remedies
- Plant-based diets are better for themselves and the environment

Wellness Seekers 23%

Wellness Seekers are **fast followers** that pay close attention to the **latest wellbeing trends** in order to improve their mind and body.

- Male, city dwellers
- More ethnically diverse
- Fast followers on fad diets
- Practice mindfulness
- Highly stressed and looking to reduce
- Very social media present on all channels

Self-Focused Savers 22%

These budget conscious consumers are focused on more traditional, less intense and **basic wellbeing habits** that improve their health.

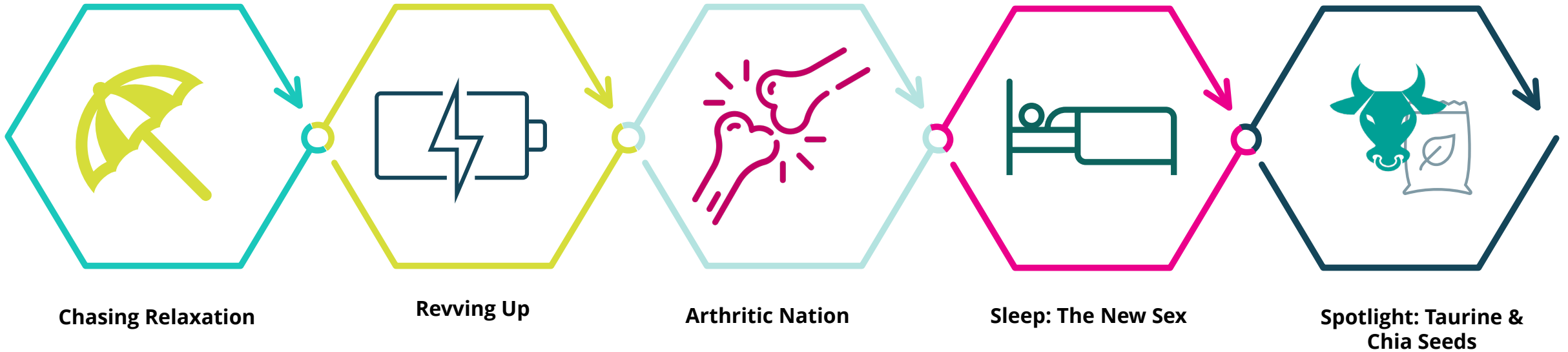
- Lower income, Baby Boomers
- Budget conscious
- Into traditional food claims like low sugar, low sodium (many suffer from heart disease) and real food ingredients
- Not really into exercise but do focus on me-time
- Very focused on reducing food waste
- Not as stressed as other segments

Detached Traditionalists 19%

Not into or up on latest fads or wellbeing trends, They are more comfortable doing things the traditional way and using traditional products/ingredients.

- Lower-income Gen Xer or a Baby Boomers
- Not trying to lose weight or follow any specific diets
- Not particularly stressed
- Care about the environment but find eco-friendly products and behaviors hard to follow
- They do focus on improving their sleep
- Looking to reduce sugar and high fructose corn syrup

Report Overview



Trend: **Chasing “Relaxation”**

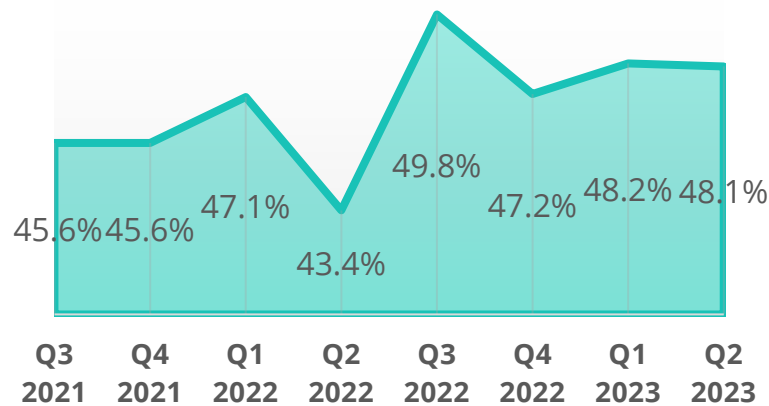


Americans say they are looking to relax but with nearly half often feeling stressed and anxious, do they even know what relaxed looks like anymore?

Nearly a half of Americans say they are often anxious and stressed out

Wellness Survey: Agreement Over Time

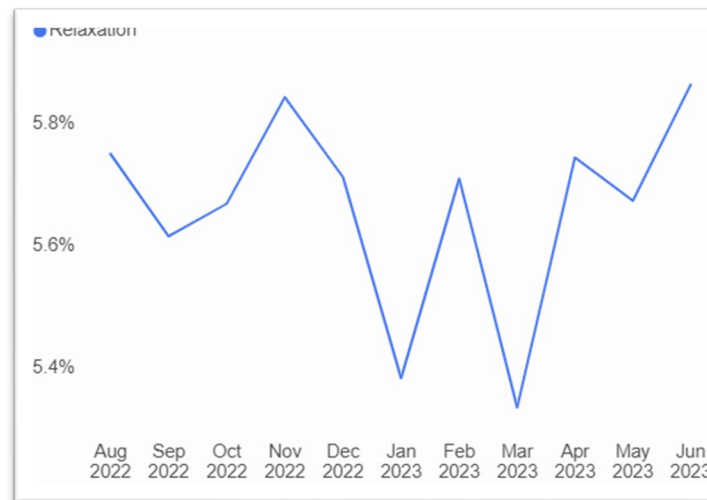
Agree: I'm often anxious and stressed out



Source: Brightfield Group Wellness Survey

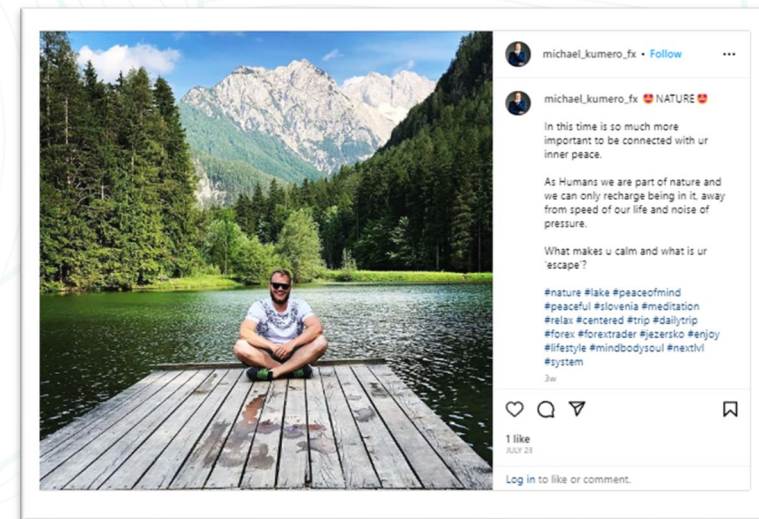
Social Discussions around relaxation pick up in spring 2023

Social Discussions: Growth Over Time



Source: Brightfield Group Wellness Social Listening

Social Post about Relaxing



Source: Brightfield Group Wellness Social Listening

We have seen an increase in the relaxation need state in our consumer survey

Relaxation Need State: Consumers who are wanting to destress and relax. These consumers are more likely to do the following based on survey answers: indicate they are stressed, say reducing stress is a priority for them, are seeking to relax, or look for products focused on relaxation/reducing stress

Wellness Survey: Need State Over Time



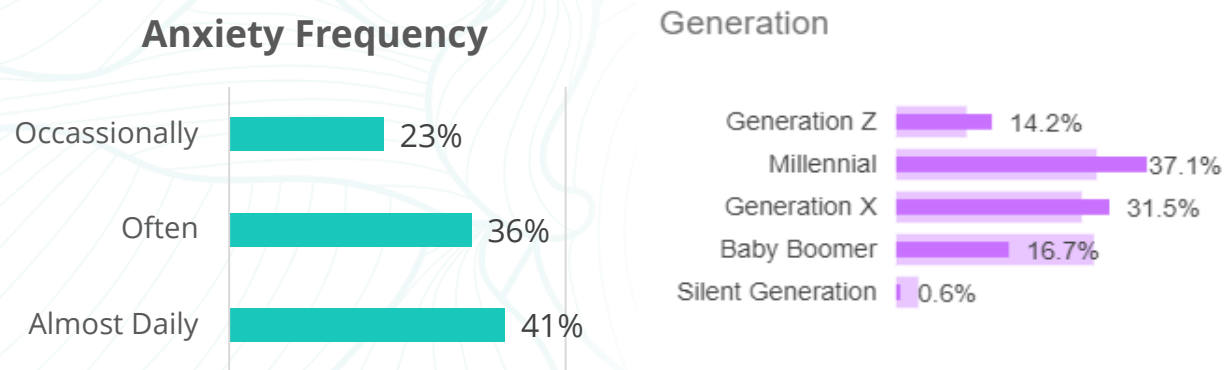
Source: Brightfield Group Wellness Social Listening

	Those in Relaxation Need State	Total U.S. Sample
Have Anxiety	38%	28%
Have Depression	28%	22%
Agree they exercise for mental health	91%	79%
Gut affects wellbeing	65%	54%
Practice Mindfulness	75%	60%
Are Wellness Seekers	26%	19%
Are Trendy Enthusiasts	14%	9%

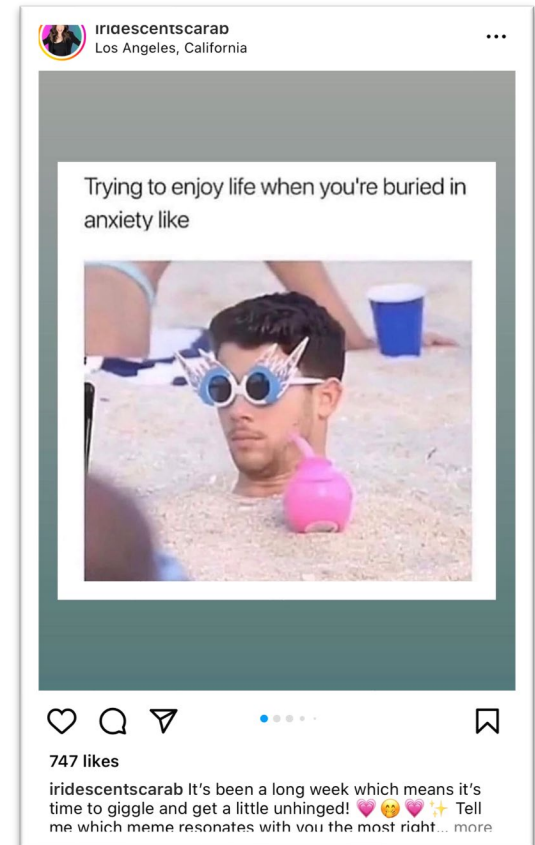
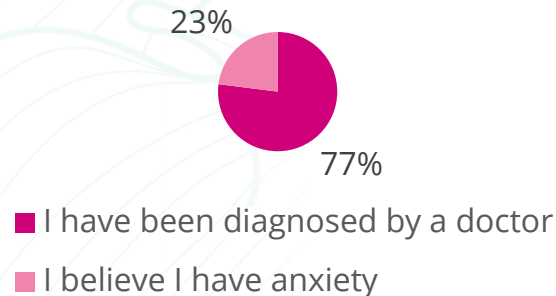
Source: Brightfield Group Wellness Survey

Nearly a third of Americans suffer from Anxiety. Most say have been diagnosed by a doctor and suffer daily. They are more likely to be Millennials and Gen Xers.

Wellness Survey: Anxiety Sufferers



Dr vs Self Diagnosis



Anxiety conversation continues to have a large presence on social media with some strong spikes in conversations in the past few months

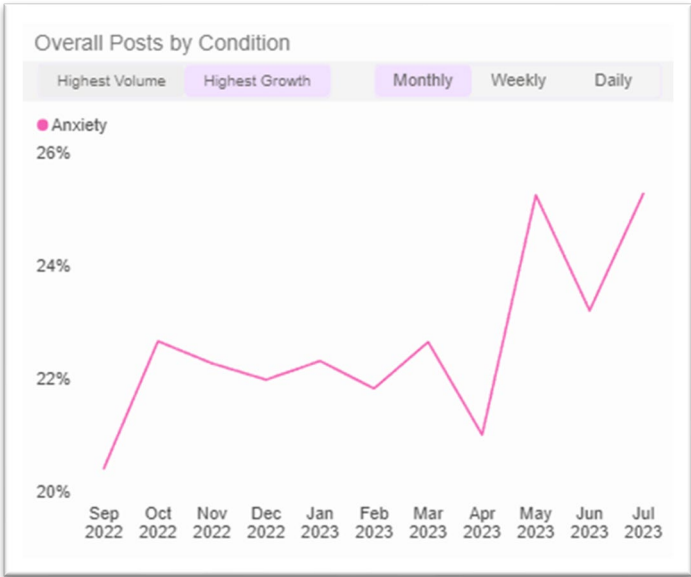
Social Discussions: Overview

Anxiety has a large share of voice in social discussions

Condition	Share of Voice	Actual Growth	Growth Rate
Anxiety	22.37%	0.98%	0.39%
Overweight	9.48%	-8.38%	-9.84%
Depression	8.46%	-0.86%	-0.84%
PMS / Women's Health	8.14%	0.42%	0.42%
Cancer	7.79%	-0.01%	-0.01%
Diabetes	7.65%	1.57%	1.68%
Acne	6.75%	-0.16%	-0.19%

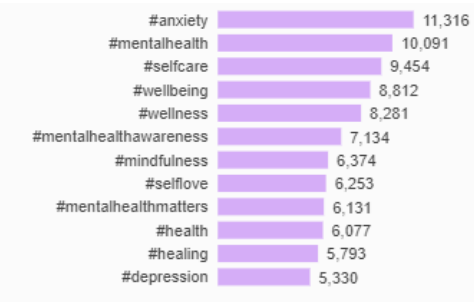
Source: Brightfield Group Wellness Social Listening

Social Discussions: Growth of Posts



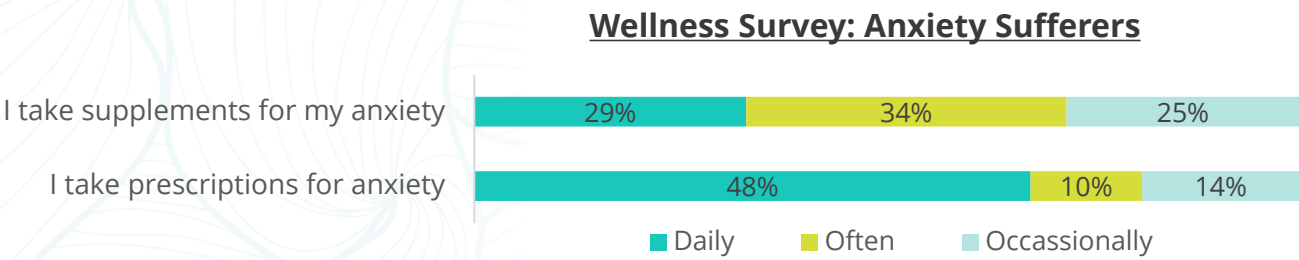
Source: Brightfield Group Wellness Social Listening

Anxiety discussion were steady most of 2023 but surged in May which is Mental Health Awareness Month. During that time, posts with hashtag #anxiety nearly doubled to over 11K.



Top Anxiety Hashtags from May 2023

Most anxiety sufferers take prescription drugs but almost a third reach for supplements



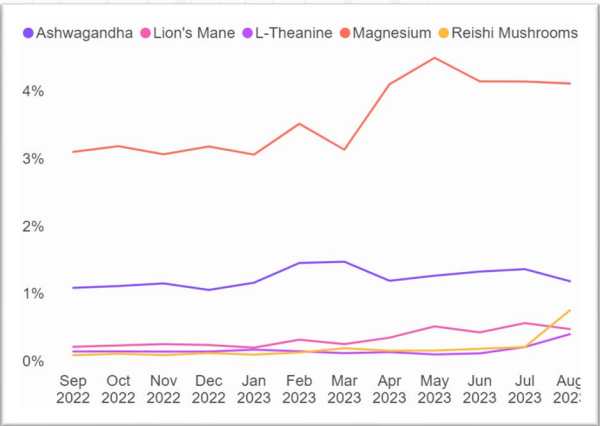
Source: Brightfield Group Wellness Survey

47% of CBD users use CBD for anxiety
Brightfield Group CBD Quarterly Study

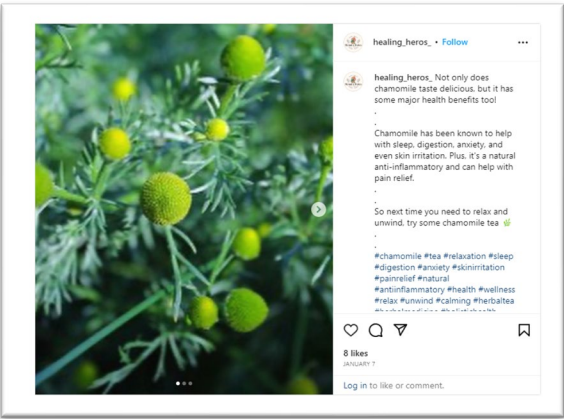
Many supplement associated with anxiety are receiving steady chatter on social

Social Discussions: Growth Over Time

Most anxiety related supplements remain steady with magnesium getting a bump in Spring



Source: Brightfield Group Wellness Social Listening



Social Discussions: Overview

Ingredients	Share of Voice	Actual Growth	Growth Rate
Lavender	6.82%	0.75%	0.89%
Magnesium	3.47%	1.02%	2.39%
Ashwagandha	1.20%	0.10%	0.73%
Lion's Mane	0.30%	0.26%	7.14%
L-Theanine	0.14%	0.26%	9.36%
Reishi Mushrooms	0.13%	0.67%	20.46%

Source: Brightfield Group Wellness Social Listening

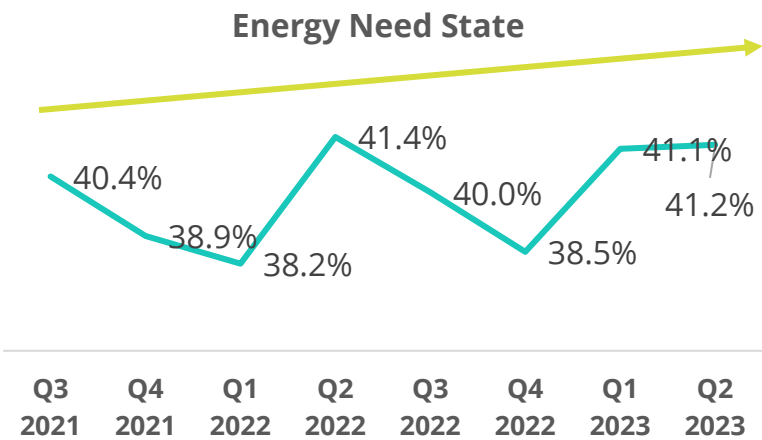
Lavender continues to have a large share of voice while relaxation supplements like Lion's Mane, L-theanine and Reishi Mushrooms are seeing more convos

Trend:
**Revving Up to Get
Through the Day**



Americans have had a long-time, love affair with caffeine and getting more energy. Currently, 4 in 10 Americans are looking to achieve Energy and many are talking about it on social media

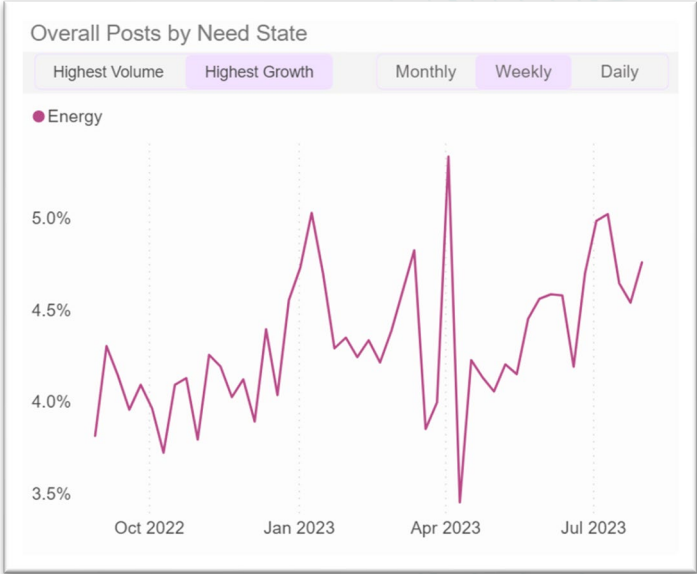
Wellness Survey: Need States



Source: Brightfield Group Wellness Survey

Relaxation Need State: Consumers looking to boost their energy. These consumers are more likely to seek out products that claim to boost energy or turn to alternative medicine to boost energy

Social Discussions: Growth of Posts



Source: Brightfield Group Wellness Social Listening

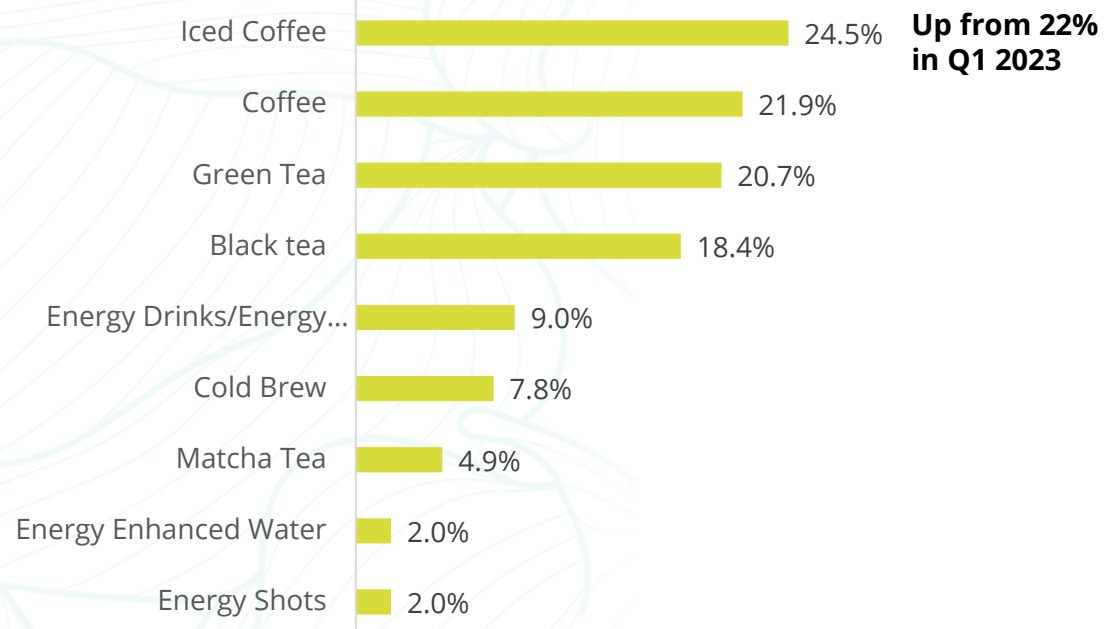
People are turning to energy products beyond just tea and coffee

Over 9 in 10 (93%) Americans report consuming caffeine.

3 in 4 (75%) caffeine consumers have caffeine at least once a day, and **1 in 4** (25%) consume it 3+ times a day. (FoodInsight.Org)

Wellness Survey: Products Purchase P3M

(among Total U.S.)



Source: Brightfield Group Wellness Survey

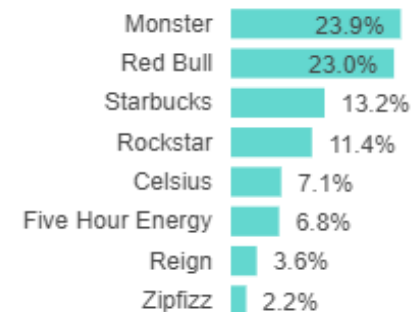
Wellness Survey: Energy Boosting Drinks/Product Purchasers (not tea or coffee)

Why Consumers Purchase Energy Boosting Drinks/Products (not tea or coffee)

Reason for Purchase



Brands Purchased Past 3 Months

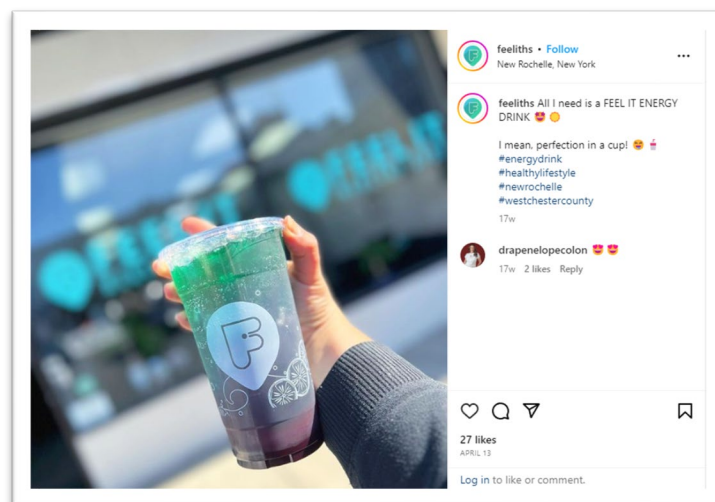
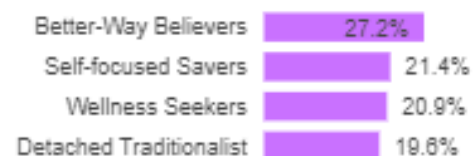


Source: Brightfield Group Wellness Survey

Energy Boosting Product Users are equally male/female, slightly skew towards lower income, in their 30's-50's and the majority are Better Way Believers



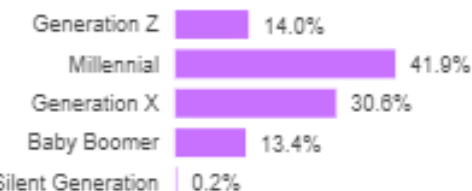
Wellness Persona



Gender



Generatio



Income Level

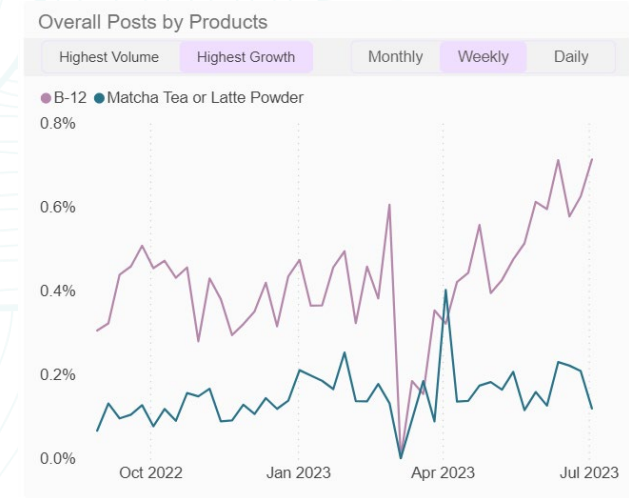


Both Matcha Tea and B12 are seeing strong increase in posts on social especially among Gen Z and Millennials.

Both matcha and B12 shots are becoming more mainstream and accessible to most Americans

Social Discussions: Growth of Posts

Match tea had some strong spike this past year and searches for recipes are up on Pinterest.



Source: Brightfield Group Wellness Social Listening

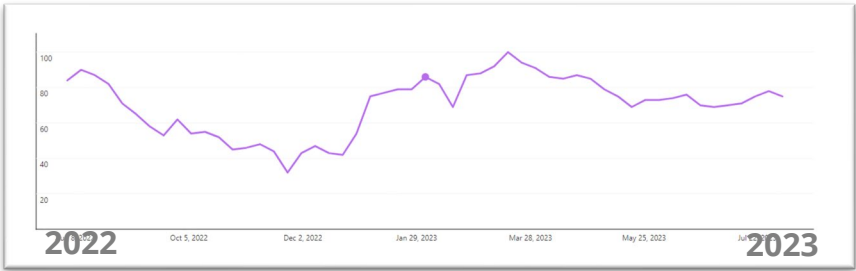
B-12 really started increase this spring with more and more posts from providers offering b-12 shots and influencers touting their benefits

Social Discussions: Overview

Products	Share of Voice	Actual Growth	Growth Rate
Aloe Water	0.10%	2.20%	38.00%
Matcha Tea or Latte Pow...	0.50%	5.99%	24.39%
Fish Oil / Omega 3 / DHA	0.31%	2.85%	23.93%
Elderberry	0.06%	0.51%	22.94%
Flavored Still Water	0.34%	0.70%	16.04%
Regular Filtered Bottled ...	0.12%	0.23%	16.04%
B-12	3.39%	8.60%	12.84%

Source: Brightfield Group Wellness Social Listening

Pinterest Search Trends: Matcha Recipes



Source: Pinterest Search Trends

When looking at Gen Z, Matcha growth rate increases to 37%

When looking at Millennials, B-12 growth rate increases to 38%

Condition Spotlight: **Arthritic Nation**

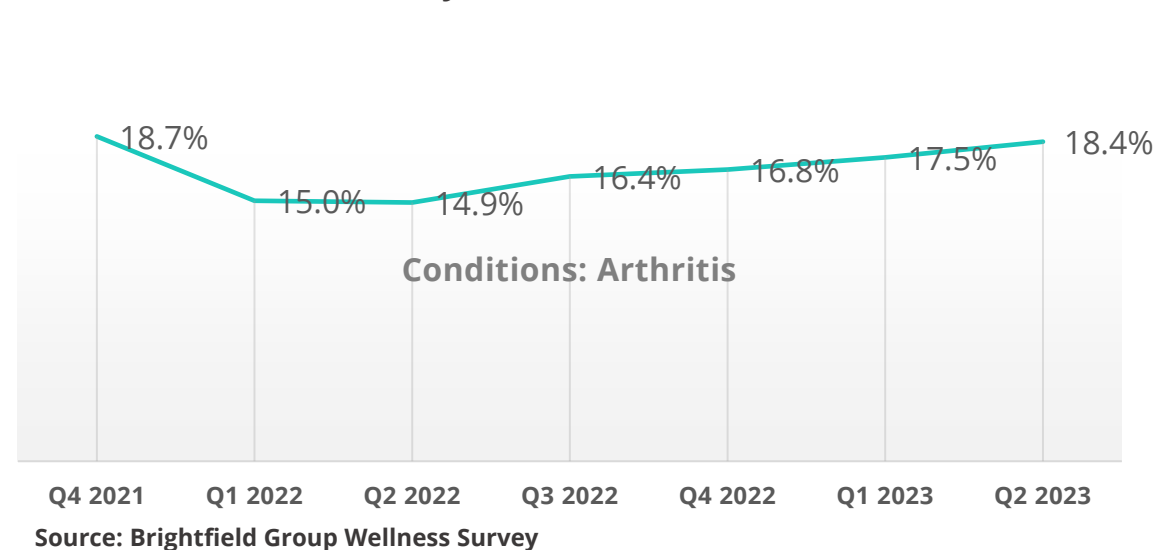


Could arthritis be the new diabetes?

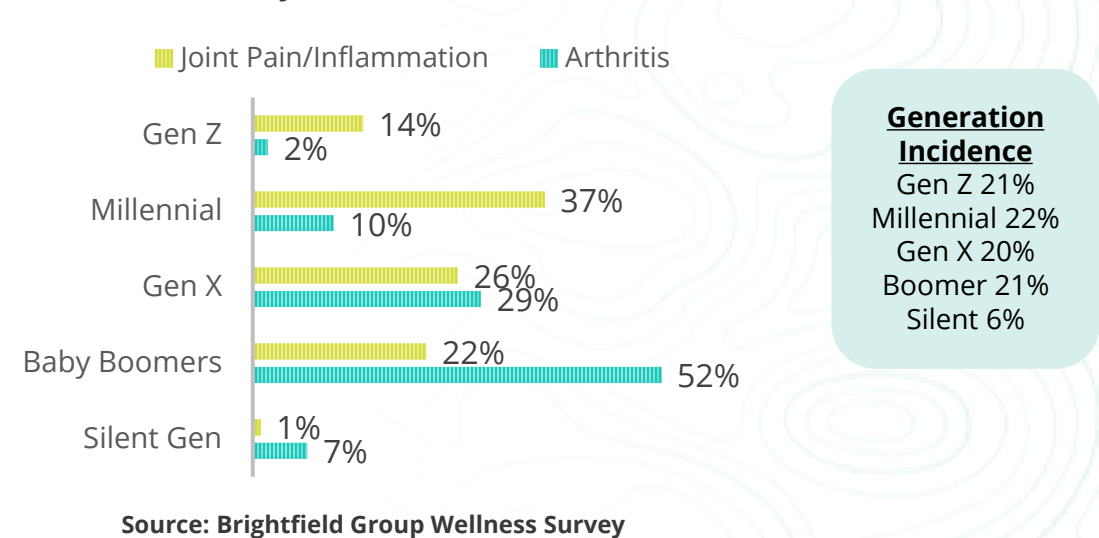
According to our data and the CDC's national health survey, it's on the rise

Arthritis is one of the leading causes of disability currently in the U.S. The CDC estimates that around 54 million Americans have arthritis, but a recent analysis of past data has determined that number is likely closer to 91 million. (Arthritis Foundation) Our aging population is a big culprit, but it seems people are getting arthritis younger due to lack of exercise, poor diets and being overweight. The chart below, based on arthritis sufferers from our survey, will surprise you on how many Millennials and Gen Z are already experiencing joint pain and how many have arthritis.

Wellness Survey: Current Conditions Over Time



Wellness Survey: Current Conditions Q2 2023



Generation Incidence

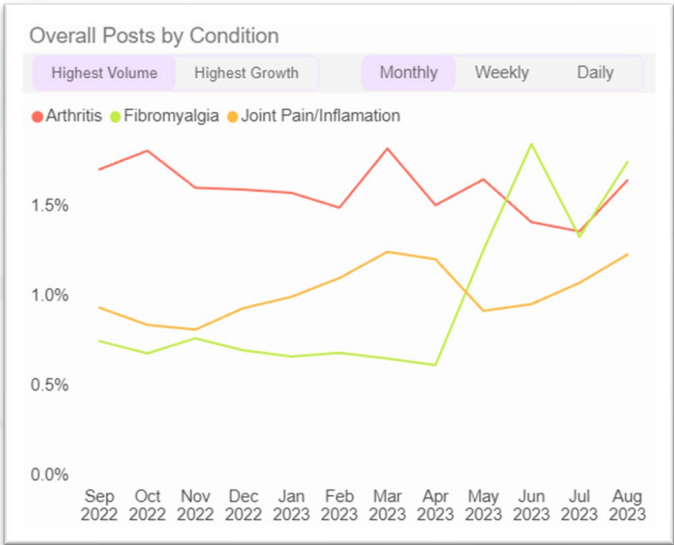
- Gen Z 21%
- Millennial 22%
- Gen X 20%
- Boomer 21%
- Silent 6%

Social conversations around arthritis and joint pain have remained somewhat constant but have had some spikes throughout the year

More well-known products that help with arthritis and inflammation, like curcumin and turmeric, show in social chatter as lesser-known products like Irish Moss and Curcumin see movement throughout the year

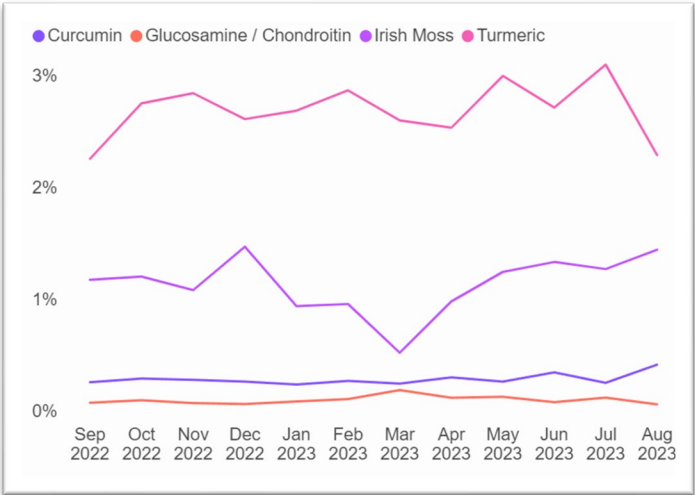


Social Discussions: Growth of Posts



Source: Brightfield Group Wellness Social Listening

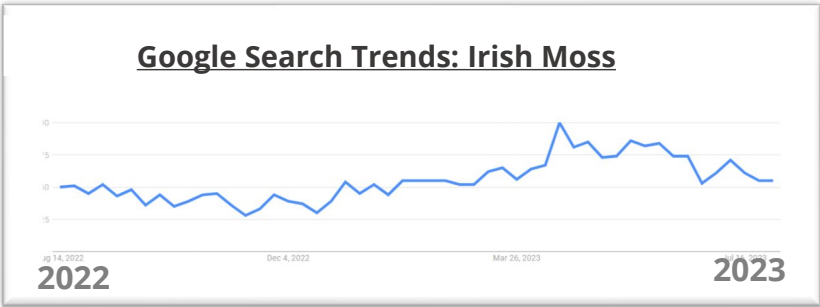
Social Discussions: Growth of Posts



Source: Brightfield Group Wellness Social Listening



Google Search Trends: Irish Moss

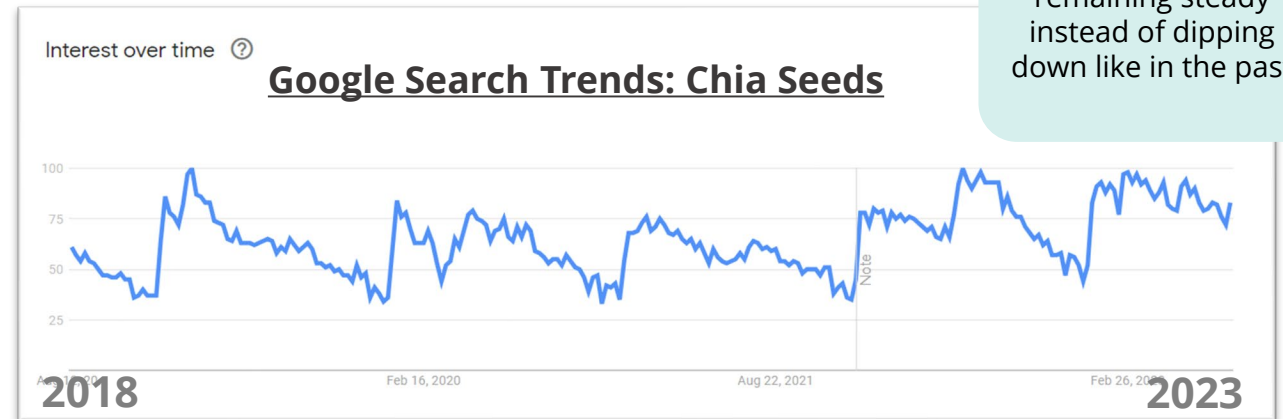


Ingredient Spotlight: **Chia Seeds**



Chia Seeds are making a comeback after a boom in the early 2000s, proving they are more than just their iconic pets

- According to forecasts from [Grand View Research](#), the market for chia seeds is expected to increase by more than 22 percent per year from 2019 to 2025.
- Chia Seeds have been popular among Latin American cultures for centuries but grew in popularity in the U.S. first as a cool decorative plants in the 70's and 80's, then as a mega health food in the 2000-2010s.
- Now thanks to TikTok, chia seeds are once again making a comeback. TikTok users are claiming that drinking a cleansing sludge of chia seeds, water and lemon will relieve constipation and aid with weight loss. They are calling it an "internal shower." The hashtag #internalshower has been viewed more than 100 million times. (NY Times)
- Chia Seeds are a good source of fiber, antioxidants, protein and gluten free so they are often used as an ingredient in gluten-free options. Nowadays, chia seeds can be found in everything from yogurts, drinks, jams, bars, cereal, rice mixes, dips, chips and so on.



Looks to be remaining steady instead of dipping down like in the past



Image from Dexerto.com TIKTOK: DRLINDSEYSCHMIDT / JACVANEK

Who is buying Chia Seeds?



6.5% of consumers reported purchasing Chia Seeds in the past 3 months

Brightfield Wellness Survey Q2 2023



- 69% are female
- 37% are Millennials
- 36% are Better way believers and 25% are Wellness Seekers
- 31% middle income and 36% upper income
- 35% follow a low sugar diet and 33% follow a low carb diet
- 84% say they focus on whole body wellbeing
- 34% say they are often a wholesome strict eater
- 54% say they often try to decrease food waste

Source: Brightfield Group Wellness Survey

There has been steady growth in posts on social media with Gen Z really driving the growth behind Chia Seeds

Social Discussions: Growth of Posts Gen Pop



Source: Brightfield Group Wellness Social Listening

Social Discussions: Growth of Posts by Gen Z



Source: Brightfield Group Wellness Social Listening

From the Feed: Chia Seeds

X (TWITTER)



Nutro Vally
@nutrovally

Health Benefits of Chia Seeds
@NutroVally

- ✓ Loaded with antioxidants
- ✓ Highly nutritious
- ✓ May benefit heart health
- ✓ Contains bone nutrients



INSTAGRAM



Wellness Blog
Chia Seeds



**Wellness Blog** Did you know that just 2 tbsp of chia seeds pack a powerful punch of nutrition? 🌿🔥 With 64% more potassium than a banana, 5x more calcium, 3x more iron than spinach, 41% of your daily fiber, 100% more omega-3 than salmon, 20% protein, 32% your daily magnesium, and 2x the antioxidants of blueberries, these tiny seeds are a true superfood! 🥰🌟



X (TWITTER)



Chia Seed Company
@chiachiachia

Pour 1 tbsp of chia seeds in 1 glass of water and give it a good mix. Keep it aside for 6-8 hours and drink it as it is ✨

[#fitness](#) [#healthyrecipe](#) [#chiaseed](#)
[#powerhouse](#) [#nutrition](#)



INSTAGRAM



Nutrition Blog
Chia Seeds



**Nutrition Blog** I do love a good chia pudding. it's not only delicious but chia seeds are great for your digestion being a valuable source of fibre, they're also a good source of plant based protein and healthy fats...a real all rounder



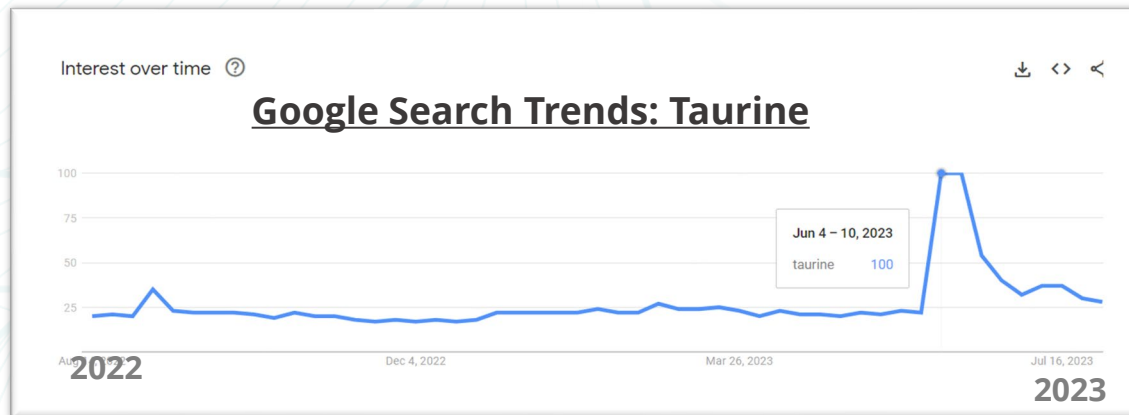
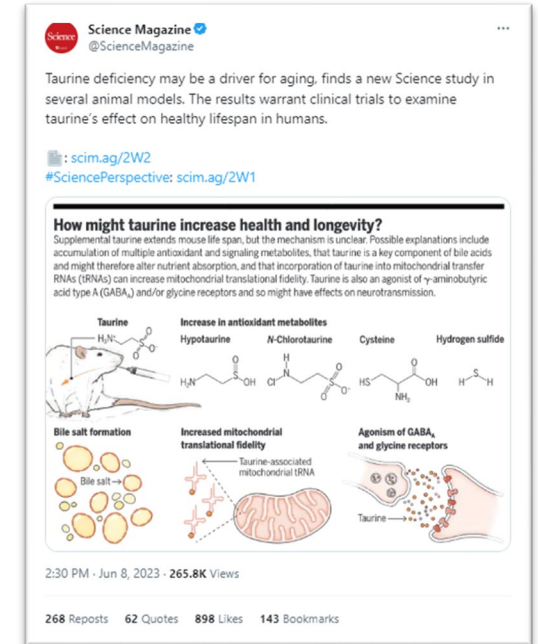
Supplement Spotlight: **Taurine**



New study validates Taurine could be the new fountain of youth



Taurine deficiency is a driver of aging in animals, according to a new study published in [Science Magazine](#). The study also found that taurine supplements can slow down the aging process in worms, mice, and monkeys (Science.org). Further research is needed to verify this is also true in humans, but initial examinations of data from the [EPIC-Norfolk study](#) showed that **people with higher taurine levels were healthier, had lower levels of inflammation and were less likely to have Type 2 diabetes or high blood pressure or to be obese** (NCB News).




- Once the study was published consumers started flocking to the internet for info on taurine. Below shows the steep google search increase after the study was published.
- Taurine has been in supplement form since the 1800s and is already found as an additive in most energy drinks to help provide a calming affect against the uppers from the caffeine and b vitamins. Taurine is also found naturally in protein shakes and naturally in meat, dairy and fish.

Major spike in discussions on taurine as the study hits the media in Spring


Social Listening

Source: Brightfield Group Wellness Social Listening

Ingredients	Share of Voice	Actual Growth	Growth Rate
Taurine	0.16%	0.29%	15.62%
Chaga Mushroom	0.06%	0.08%	9.91%
Cordyceps	0.42%	0.41%	9.88%
Winter Cherry	0.00%	0.01%	9.26%
Creatine	0.93%	0.58%	5.98%
Reishi Mushrooms	0.13%	0.07%	4.90%
Guarana	0.14%	0.04%	4.19%



drjkahn
Kahn Center for Cardiac Longevity






lifeextension

Taurine: A Key to Healthy Aging

At doses ranging from about 1,500 mg to 3,000 mg daily in clinical studies, taurine has been found to:

- Reduce inflammation
- Improve scores on a test for cognitive impairment
- Improve cholesterol and triglyceride levels
- Lower blood pressure
- Improve insulin sensitivity
- Lower fasting blood glucose
- Improve control of diabetes and diabetic complications



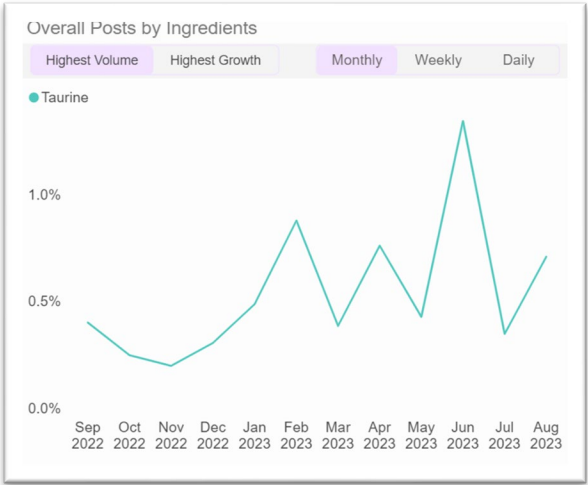
1,337 likes

drjkahn Taurine is in the news. The topic of my... more

June 17

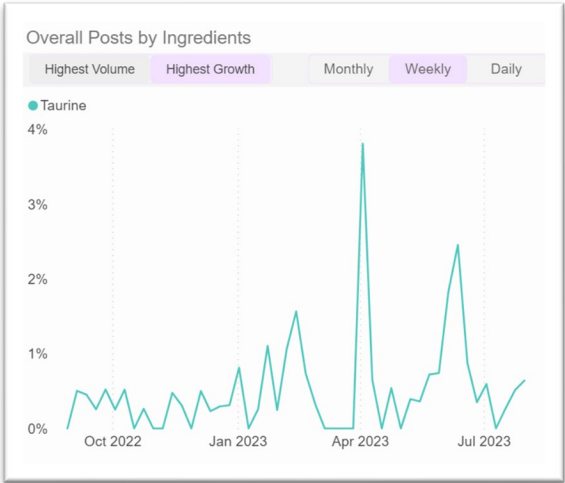
Social Listening; Volume of Posts

Source: Brightfield Group Wellness Social Listening



Social Listening; Growth of Posts

Source: Brightfield Group Wellness Social Listening

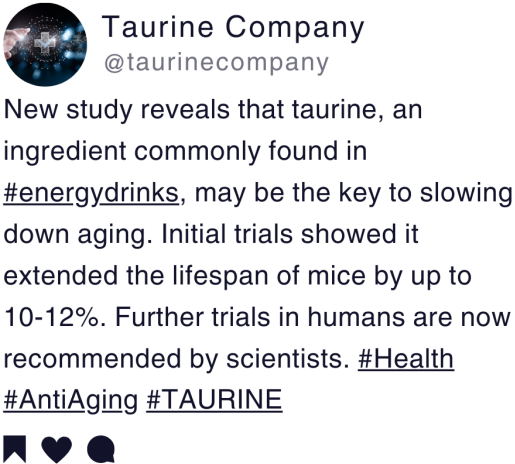


From the Feed: Taurine

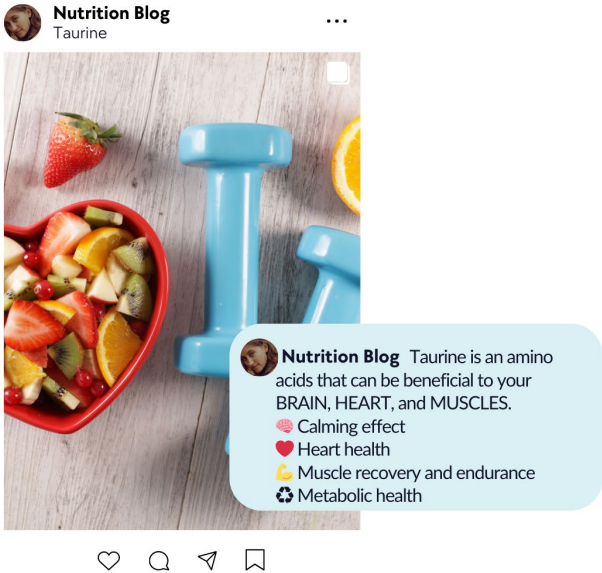
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X (TWITTER)



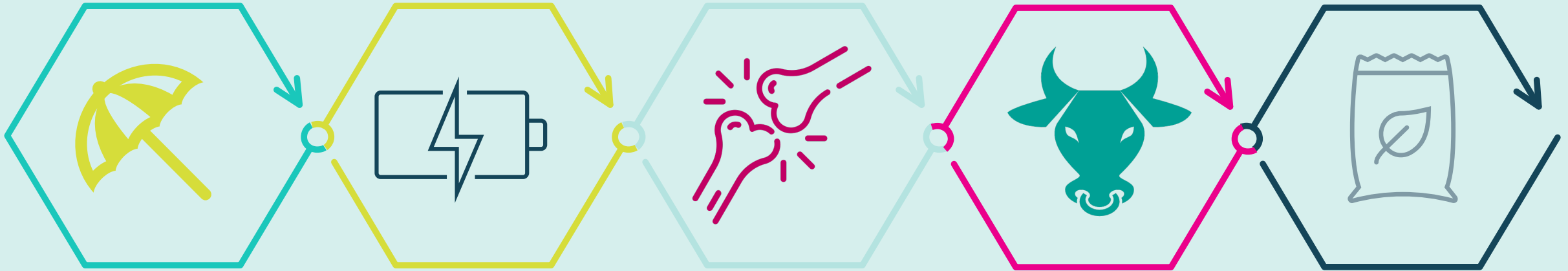
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X (TWITTER)



Report Summary



Chasing Relaxation:

Americans say they are looking to relax but with nearly half often feeling stressed and anxious, do they even know what relaxed looks like anymore? Most looking to relax have anxiety. Anxiety sufferers are more likely to be Millennials and Gen Xers. **Many supplement associated with anxiety are receiving steady chatter on social**

Revving Up:

Americans have had a long-time, love affair with caffeine. **Currently, 4 in 10 Americans are looking to achieve Energy** and many are talking about it on social media. People are turning to energy products beyond just tea and coffee. Both Matcha Tea and B12 are seeing strong increase in posts on social. Both matcha and B12 shots are becoming more mainstream and accessible to most Americans

Arthritic Nation: Will arthritis be the new diabetes? According to our data and the NHIS, it's on the rise. Social conversations around arthritis and joint pain have remained somewhat constant but have had some spikes throughout the year. **Trendier supplements used to help with inflammation and arthritis, like turmeric and Irish moss, are getting some social buzz.**

Chia Seeds: Chia Seeds are making a comeback after a boom in the early 2000s, proving they are more than just their iconic pets. Chia seed purchasers are more likely to be women, mid to higher income, say they strive for a wholesome diet, and are into reducing waste. **There has been steady growth in posts on social media with Gen Z** really driving the growth behind Chia Seeds.

Taurine: Some are touting Taurine as the new fountain of youth. A recent study concluded **taurine deficiency is a driver of aging in animals.** We saw a major spike in discussions on taurine when the study hits the media

Get into the data in the Brightfield Portal!

Explore Consumer Insights 

Explore Social Listening 

