



WELLNESS TRENDS TO WATCH

MAKING A SPLASH IN 2024

Americans focus on Hydration, Beverages, Dry January and Fish Oil

Report Based on Q4 2023 Data

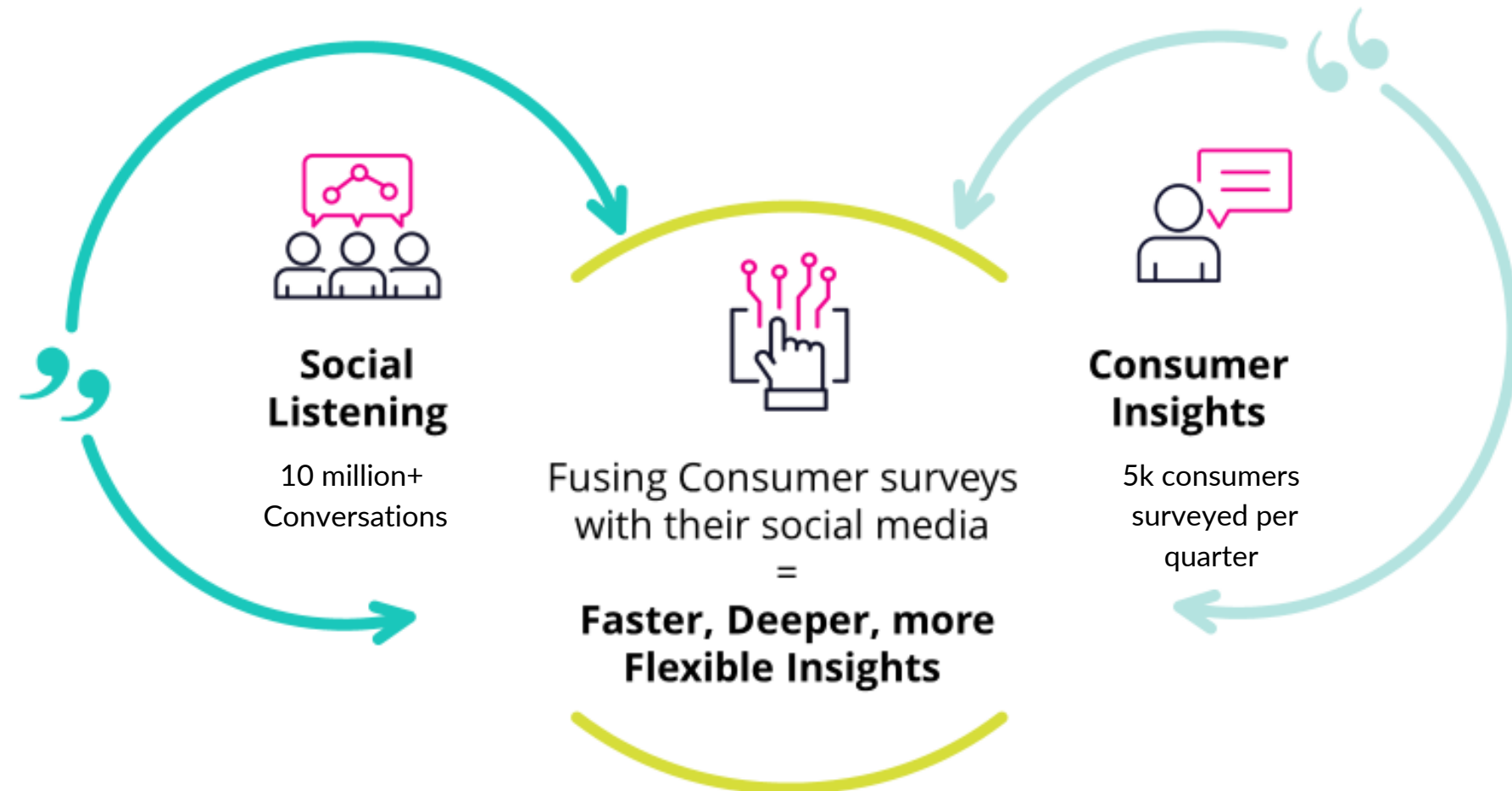


ABOUT BRIGHTFIELD GROUP CAPABILITIES for CPG

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




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!





HYDRATION FIXATION

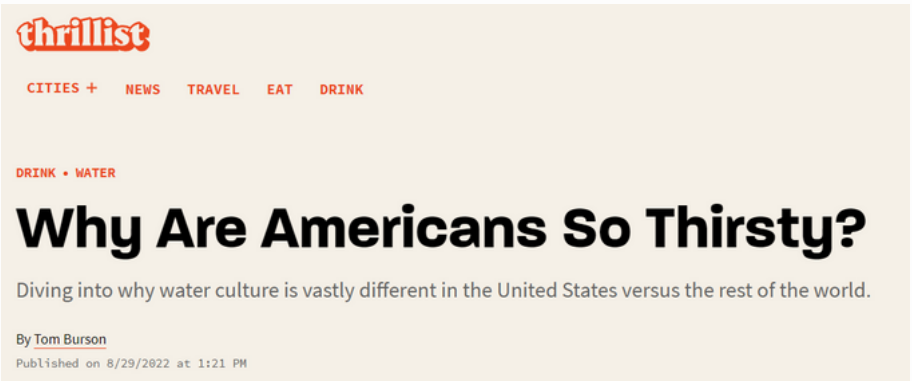


Americans are very thirsty....

August 2023 *The New York Times*

According to TikTok, Americans Are Very, Very Thirsty

Drinking water is impossible to come by in Europe — or so goes a complaint on social media. Well-hydrated Europeans have responded with eye rolls from every corner of the continent.



In 2020 the New York Times proclaimed, “Everyone’s resolution is to drink more water,” viewing hydration as a health and wellness panacea.

TIME

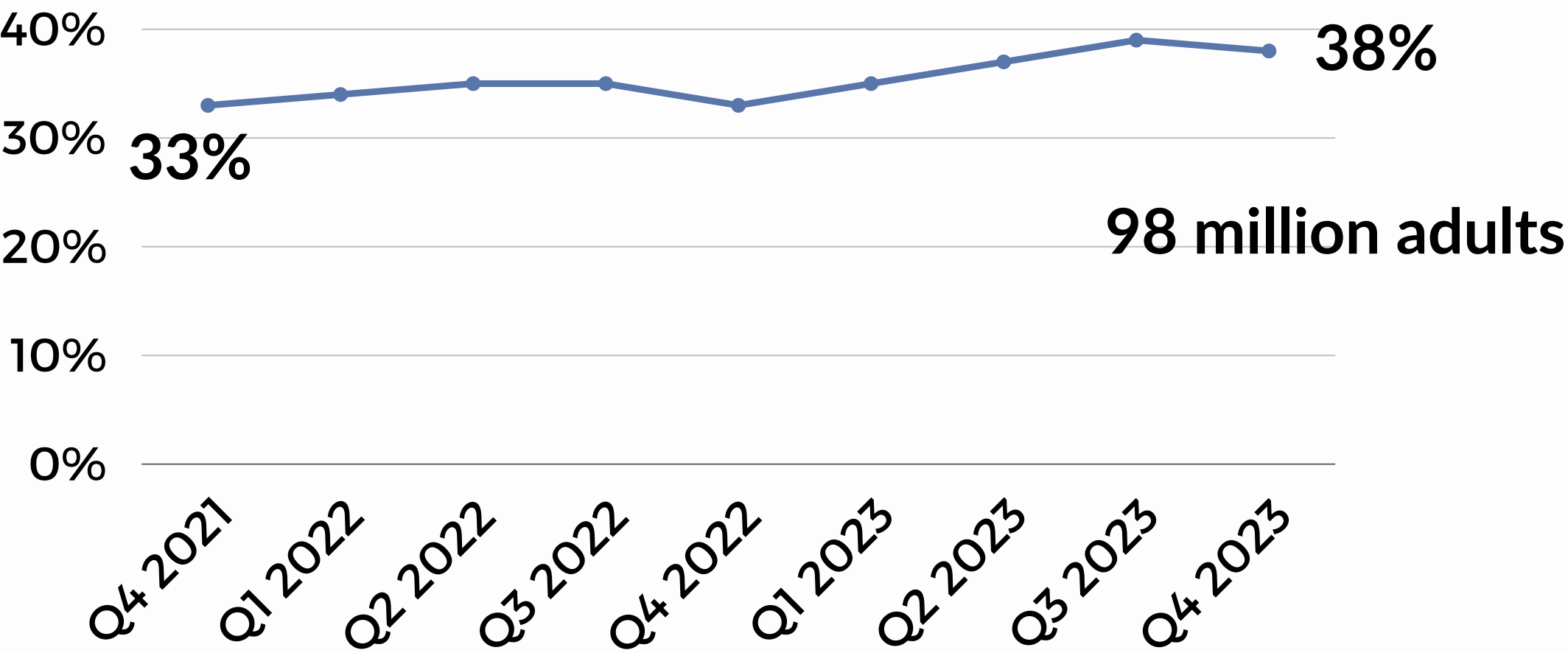
69% Growth of social posts with hashtag #StayHydrated in the past 2 years - Brightfield Social Listening





About 4 in 10 Focused on Hydration

Consumers Who are Focused on Hydration (Need State)



2011: Must-Have Water Bottles Trend Gains Steam



2023: Water Bottle Brawls & Obsessively Collecting



When Did Reusable Water Bottles Become A Status Symbol?

CAIT MURDO
JULY 5, 2018, 3:00 PM

According to the WGSN archives, must-have water bottles first appeared on their radar around 2011. She credits a company called Bobble with helping to really put reusable water bottles on the map.

STANLEY'S TARGET COLLABORATION SPARKS IN-STORE AND SOCIAL MEDIA FRENZY

Stanley is trending again following the recent release of a Valentine's Day collaboration with Target

By Adrienne Pasquarelli, Published on January 03, 2024.



AdAge



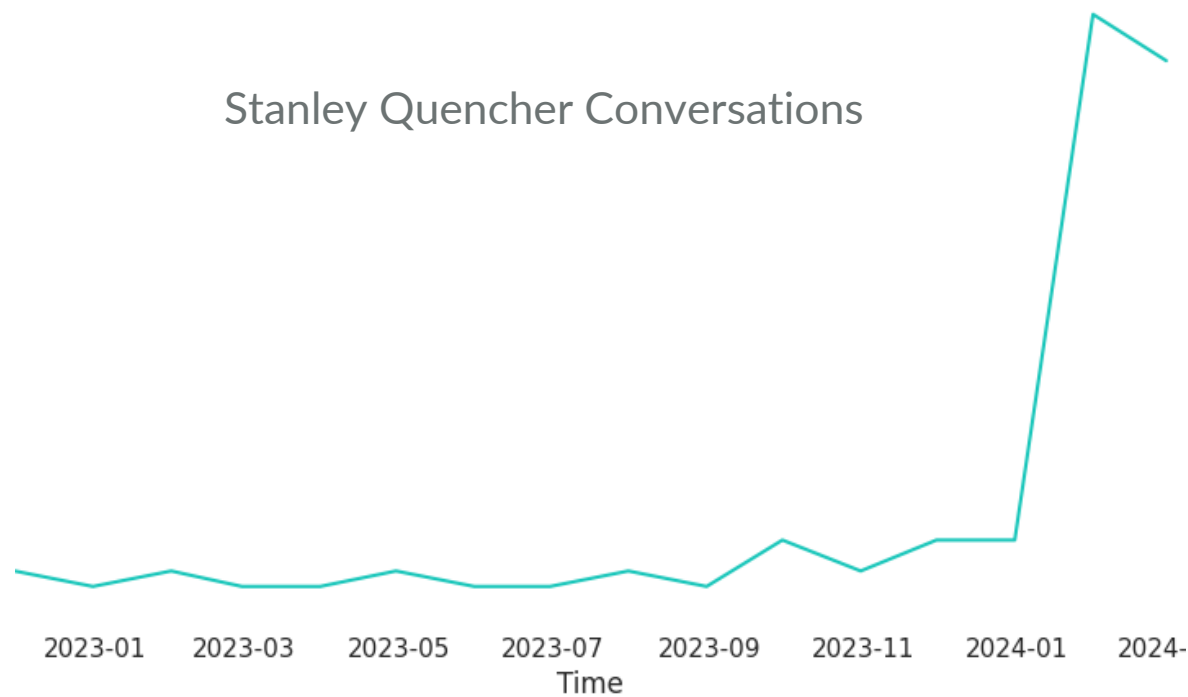
How Stanley turned a 110-year-old water bottle into a \$750 million business

The Stanley Quencher Phenomenon

BRIGHTFIELD GROUP

Volume Over Time

Stanley Quencher Conversations



Source: Brightfield Group Wellness Social Listening

Google Search Interest Over time



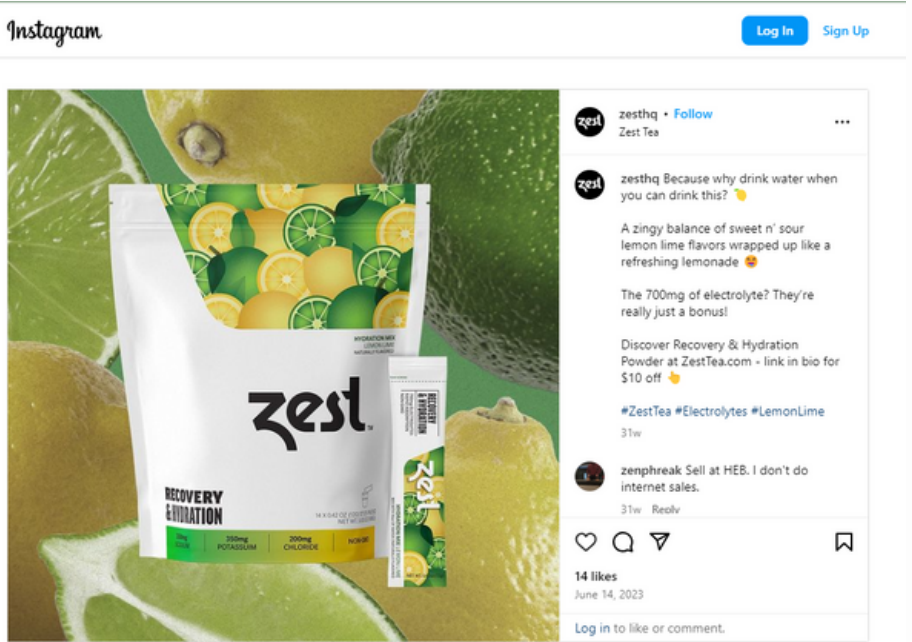
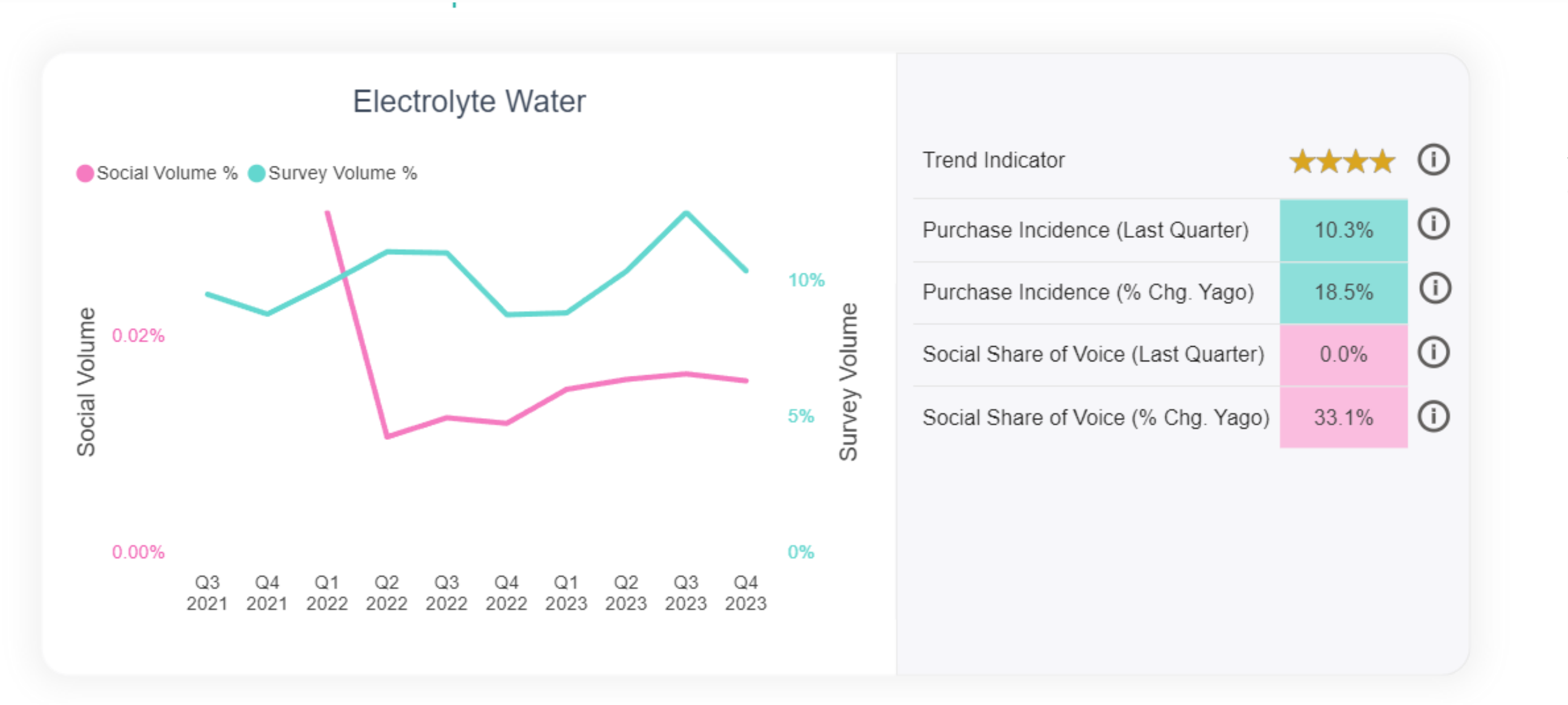
2023

2022

THE BUY GUIDE



Electrolyte water growing among consumers

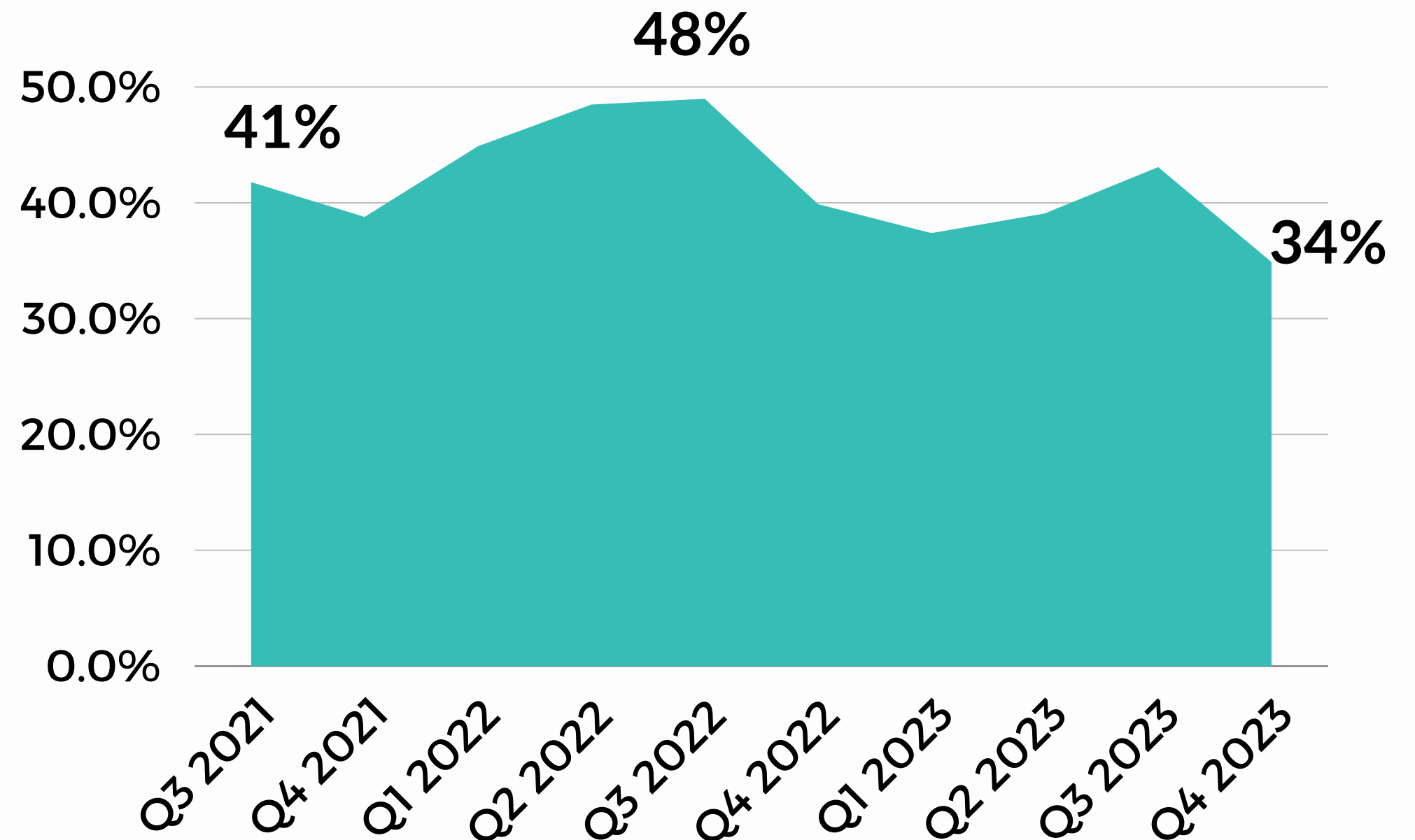


SHIFT AWAY FROM ALCOHOL



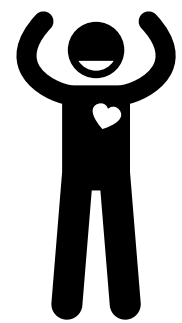
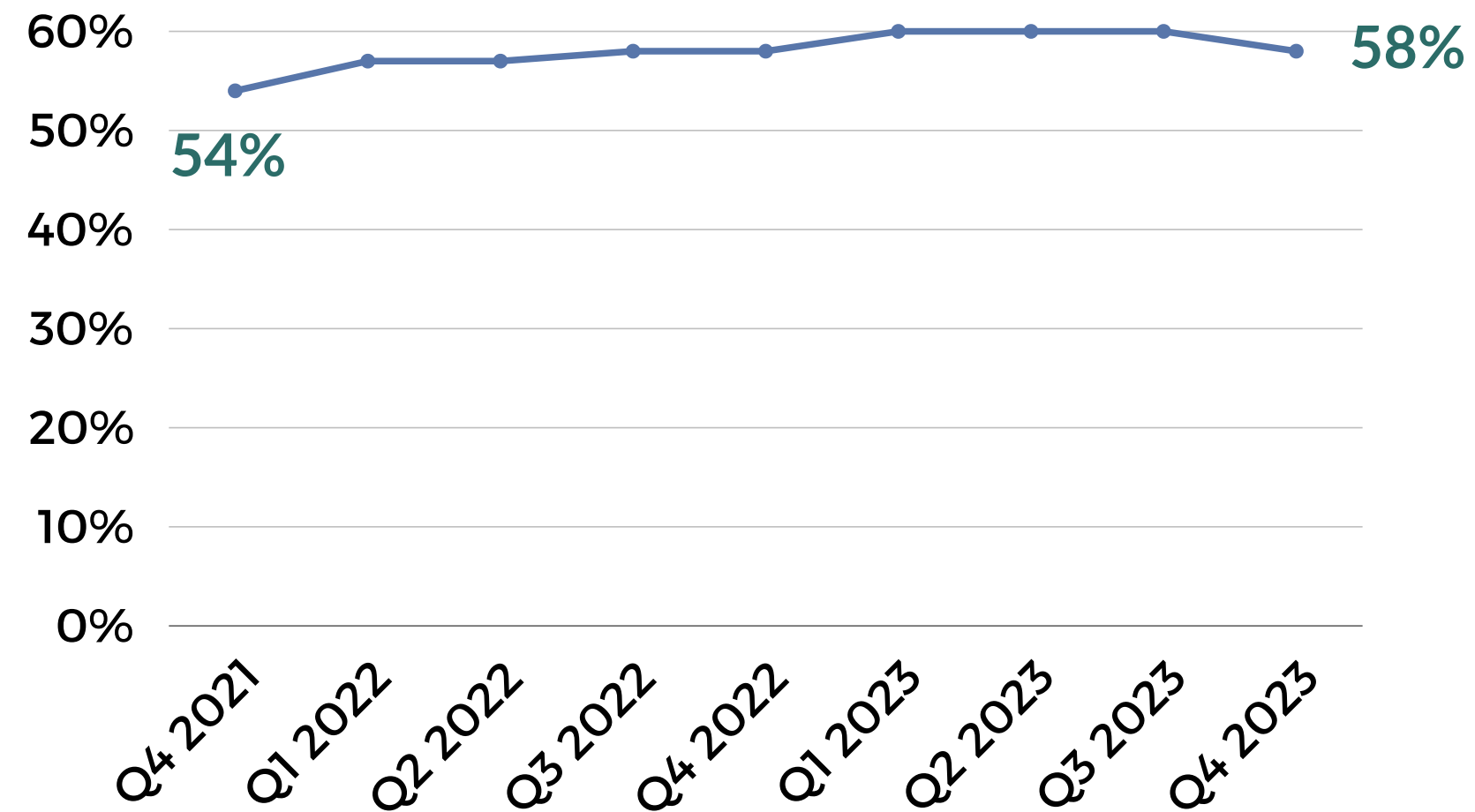


Drop in Americans saying they have Consumed Alcohol in the Past 6 Months



Source: Brightfield Group - Quarterly Consumer Wellness Survey

Over half of those who drink alcohol say they are trying to drink less



55% say it's to be healthier

34% say its to save money



Dry January explodes in in 2023

- Dry January—a month-long feat to be sober—officially launched as a campaign in 2013 under the organization Alcohol Change UK, though the practice has roots that extend as far back as 1942, when [Finland had their own](#) “Sober January” to help in the war against the Soviet Union. ([Time.com](#))
- Google Trends shows that searches for “Dry January” exploded in 2023. We also see a steep increased in posts using the phrase Dry January in the Brightfield Wellness Social Listening Data. The use of the hashtag #dryjanuary increased by 40%.



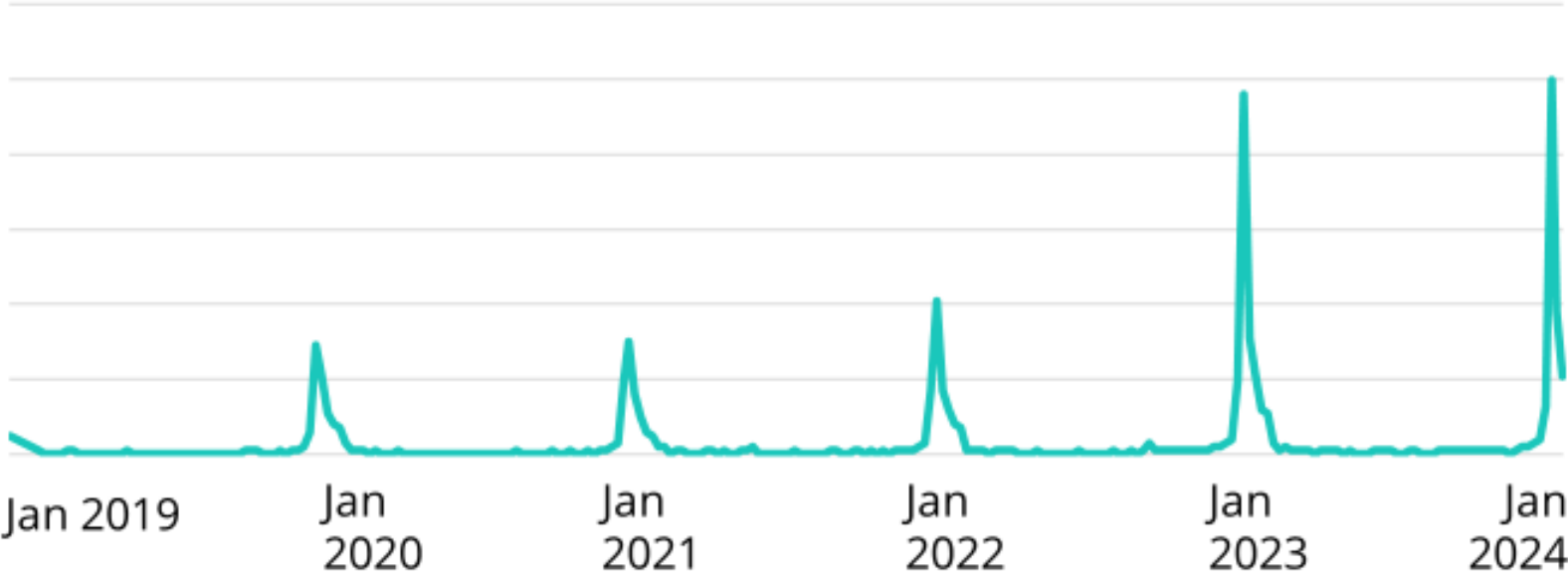
The Washington Post
Democracy Dies in Darkness

Already struggling with Dry January? A ‘damp’ January has benefits too.

By Anahad O'Connor

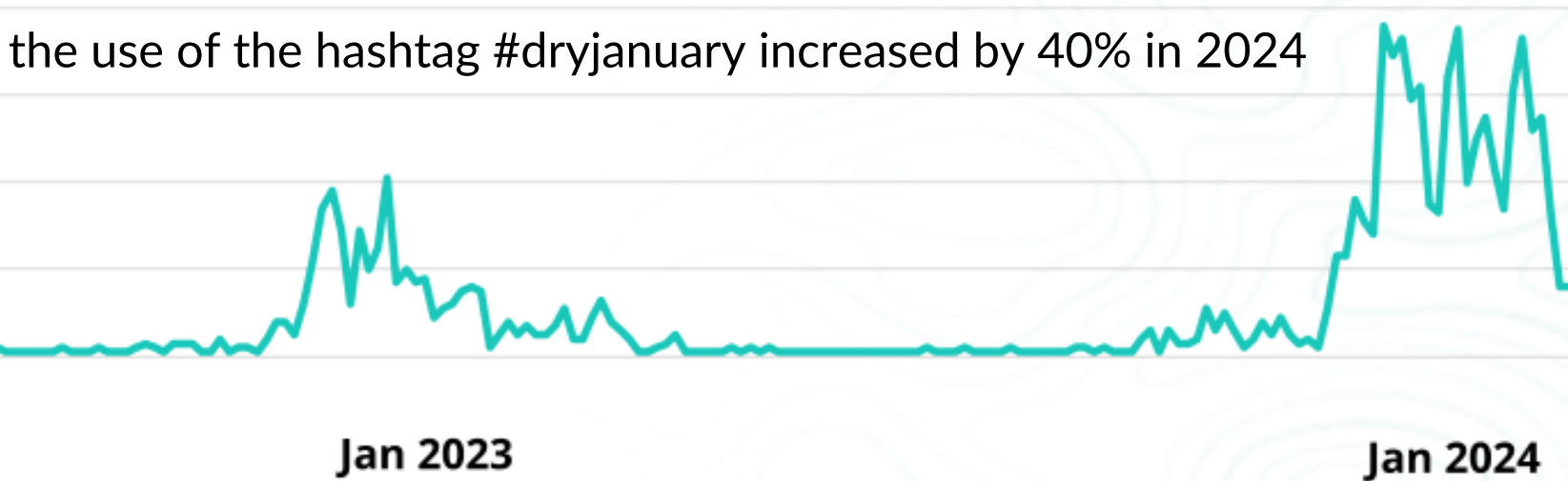
Updated January 13, 2024 at 1:21 p.m. EST | Published December 26, 2023 at 6:30 a.m. EST

Google Search Trends: Dry January



Source: Google Trends

BRIGHTFIELD GROUP Count of Posts with “Dry January”



the use of the hashtag #dryjanuary increased by 40% in 2024

Source: Brightfield Wellness Social Listening Data

AI-Generated Summary of Dry January Posts

From Brightfield Group Social Listening

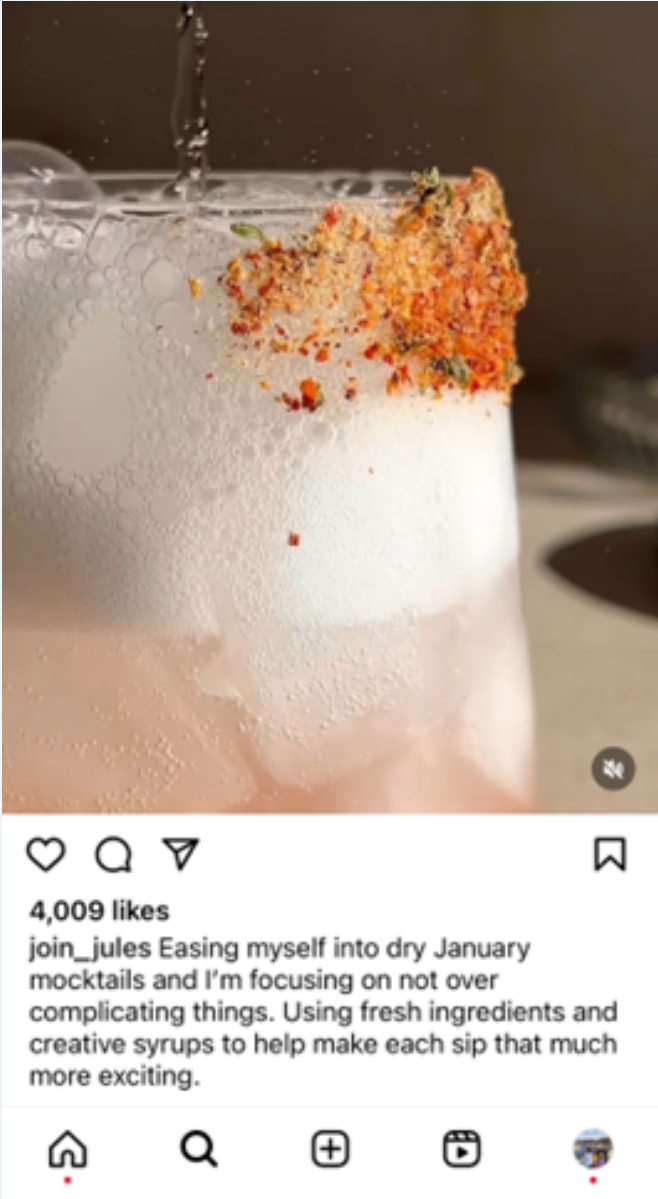
Ingredient Mentioned: ginger and turmeric. These ingredients often relate to anti-inflammatory and antioxidant properties

Flavor Preferences: Citrus and fruity flavors seem to be gaining traction

Functional Benefits: "Probiotics / Prebiotics," "Omega 3 / Omega 6," and "Aloe Vera"- interest in products that support digestive health, immunity, and overall wellness.

Mental Health Association: Anxiety and Depression

Dietary Claims: Gluten Free, Low Fat, and Low Sugar



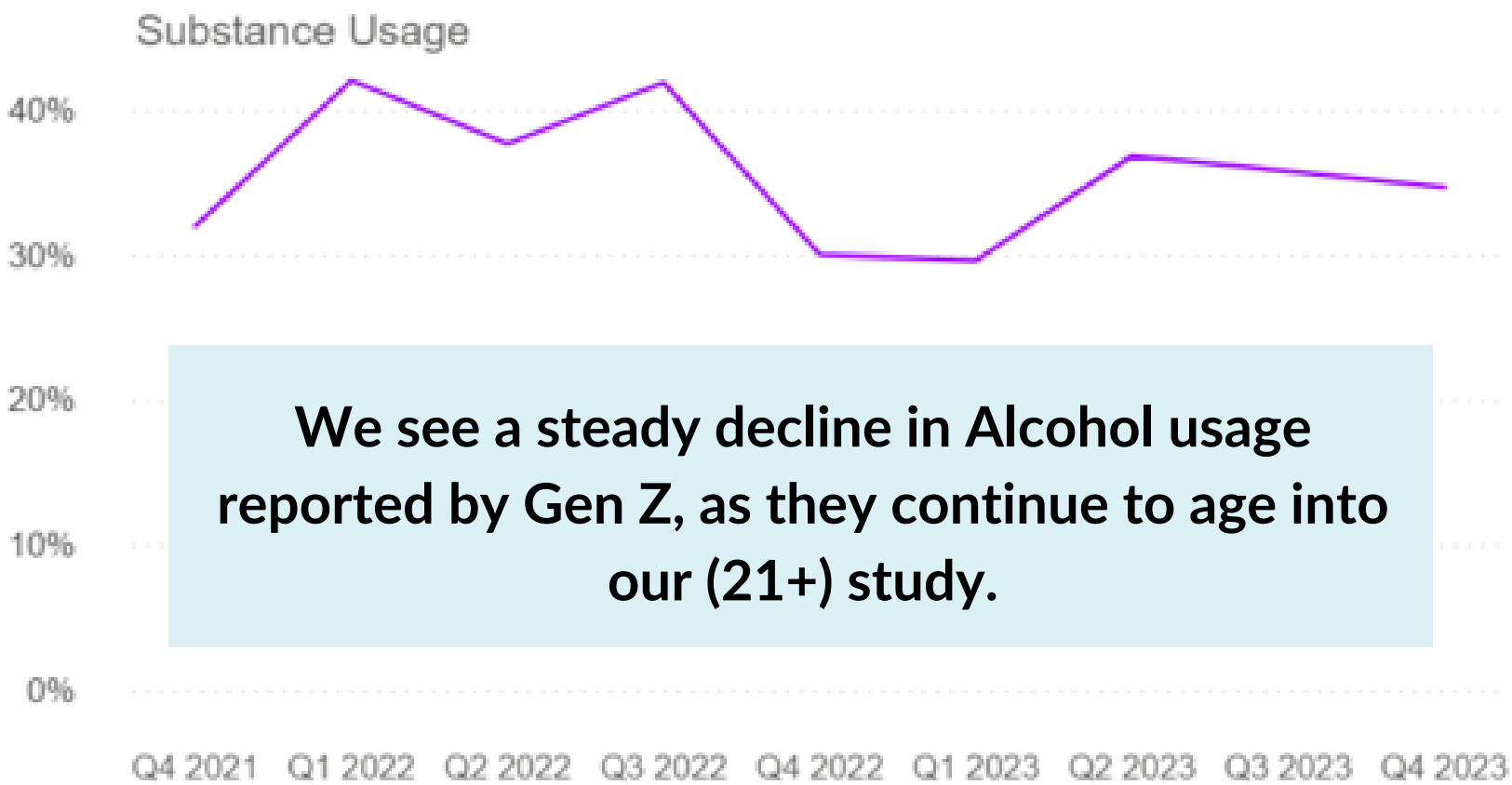


Gen Z rethinking if they want a relationship with alcohol

% of each generation that consumes alcohol

Boomer	Gen X	Gen Z	Millennial	Silent
38.3%	40.4%	34.7%	41.8%	33.5%

Alcohol Usage Overtime - Gen Z



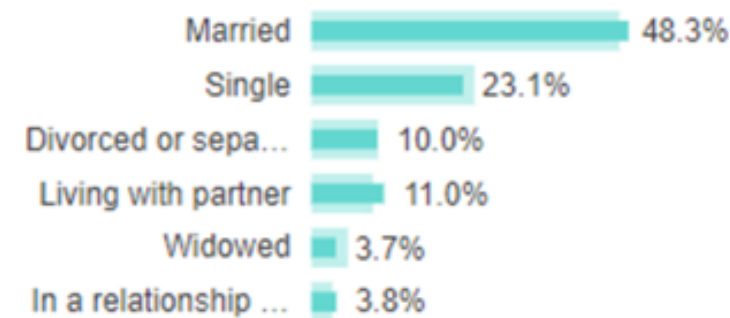
Who is drinking less?

More likely to be Millennial, upper/middle income, city-dwelling men with small kids. They are more likely to be Wellness Seekers and are looking for help with many need states including digestive health, relaxation and functional health.

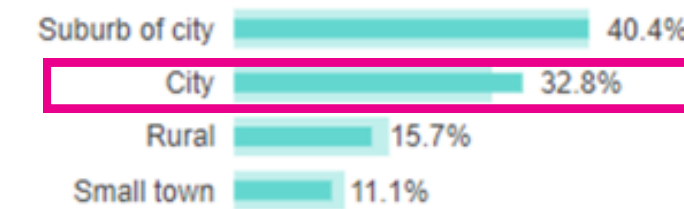
Gender



Marital Status



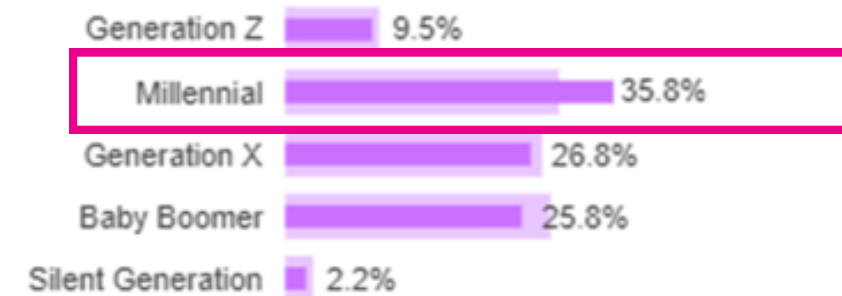
Dwelling



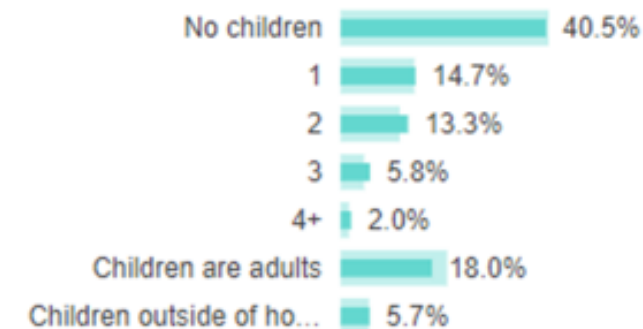
Wellness Persona



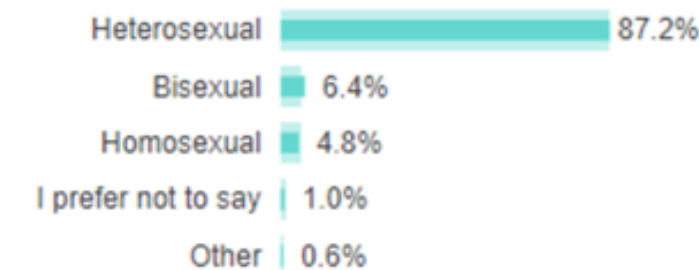
Generation



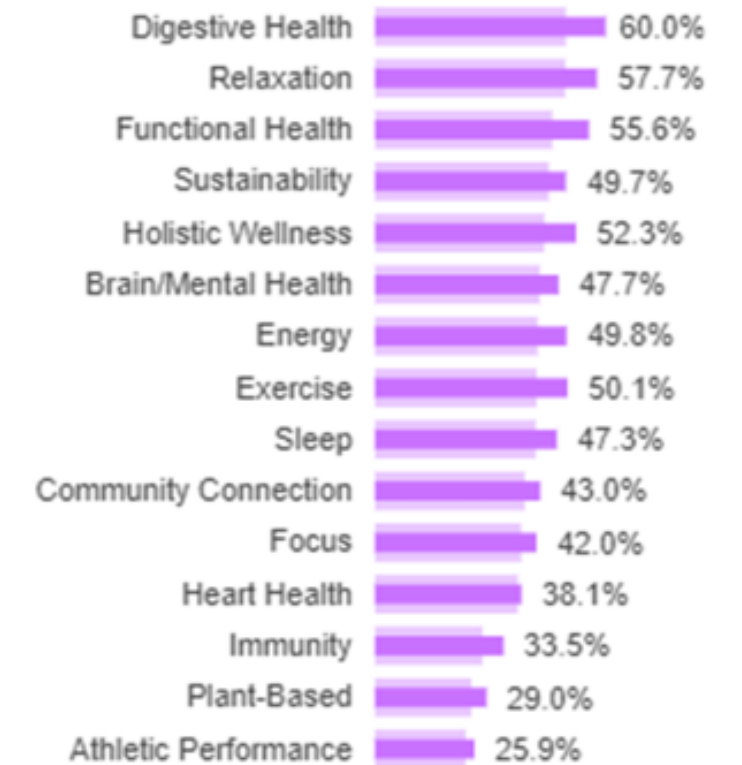
Number of Children



Sexuality



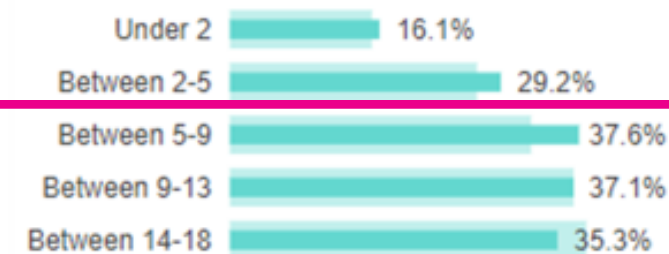
Need States



Income Level



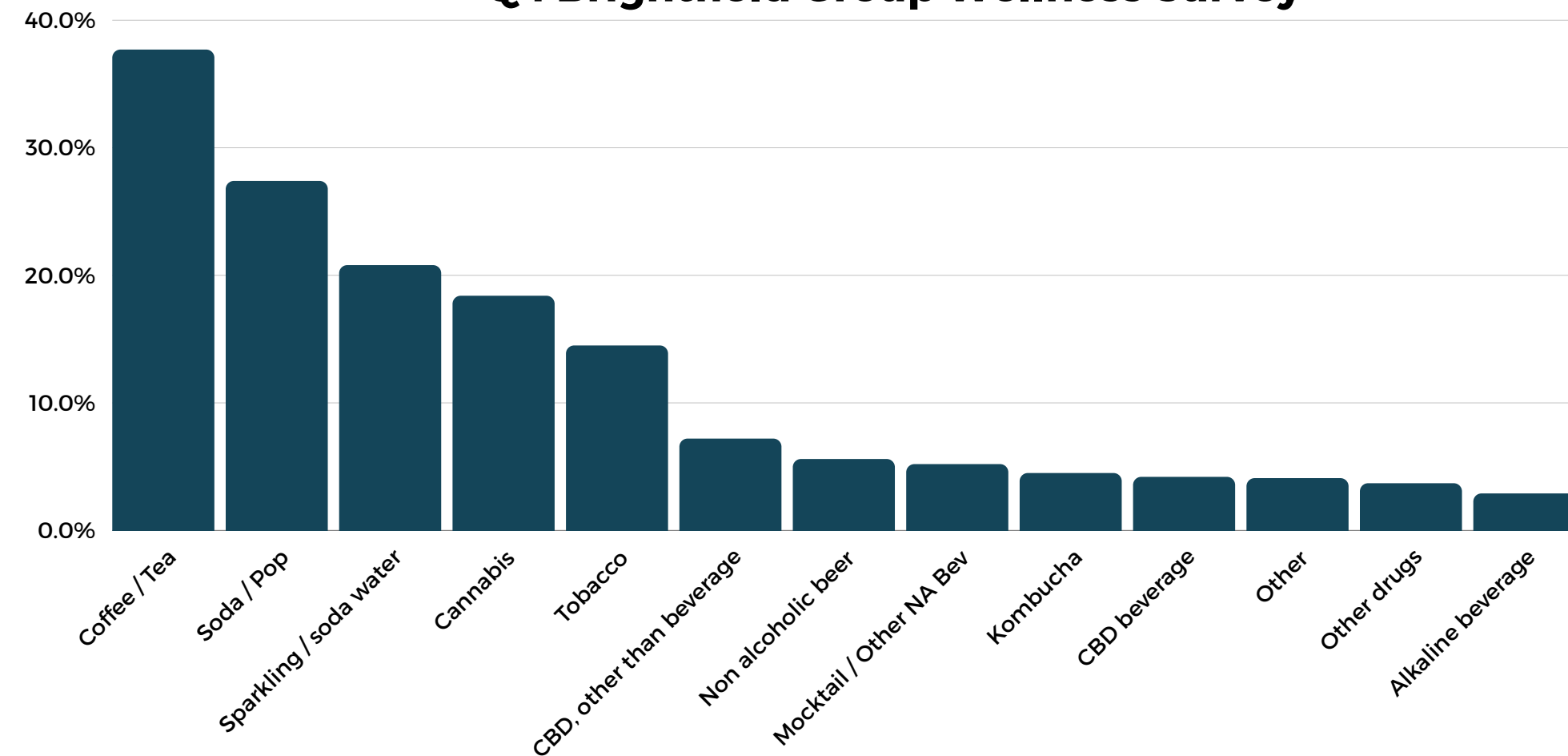
Age of Children





What are they consuming instead of alcohol?

Q4 Brightfield Group Wellness Survey



Gen Z and Millennials are much more likely to say cannabis. 22% of Americans said they used cannabis in the past 6 months versus 29% of Millennials and 32% of Gen Z.

Source: Brightfield Group - Quarterly Consumer Wellness Survey



Non-Alcoholic Beer is most purchased

(among the Non-Alcoholic Options Asked in Survey)

According to Brightfield's Q4 wellness survey,
% of Americans who have purchased in P3M

- 2.4% NA Beer
- 1.7% NA Spirits
- .6% NA Wine

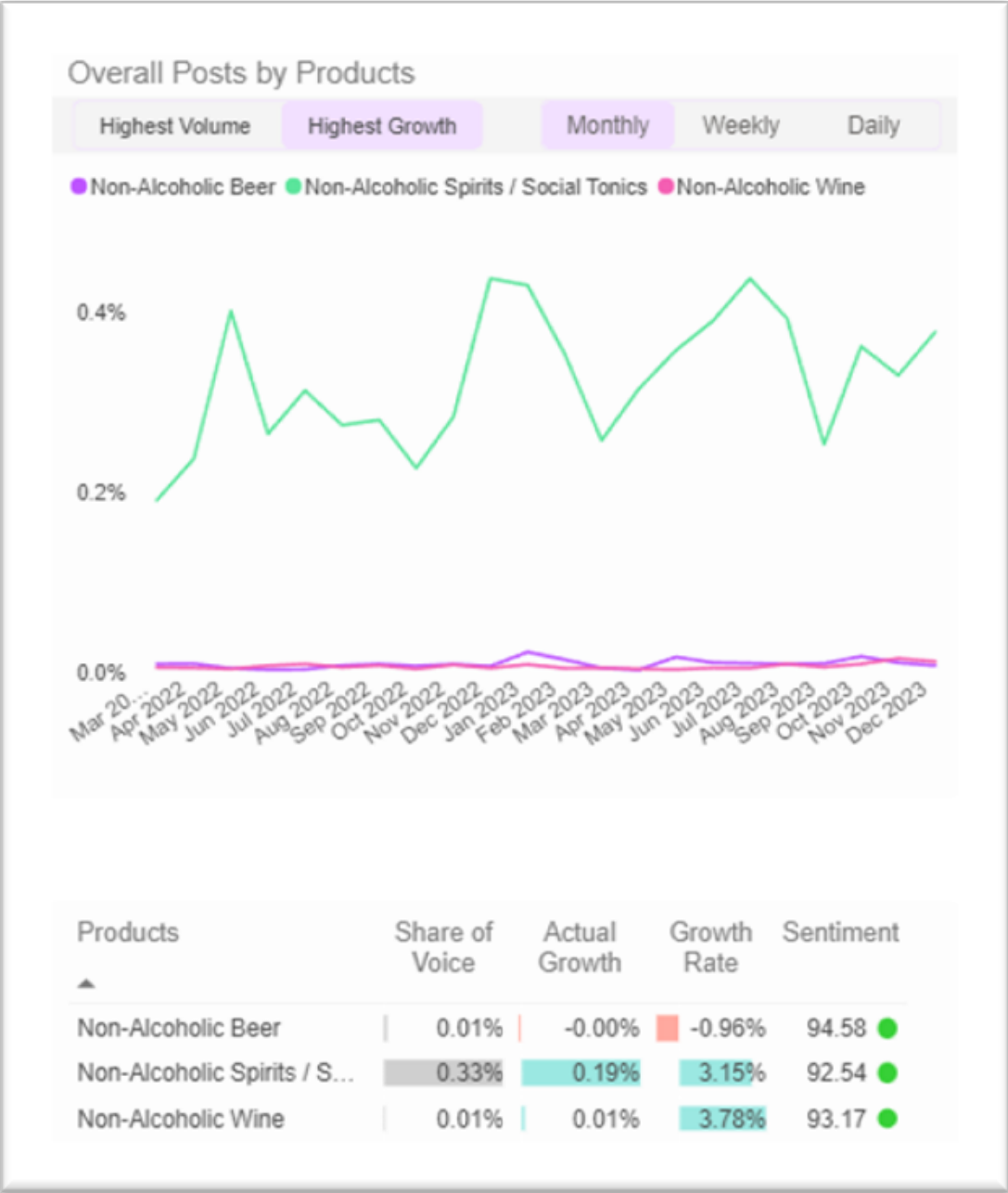
While well established, still lots of new product launches





But NA spirits and wine are growing in social conversations indicating a possible boom is on the horizon

Social Conversations about NA Beer, Wine and Spirits



Source: Brightfield Group Wellness Social Listening

Beyond tasty, desire for functional benefits from NA options - ingredients focus on energy or relaxation

Top Ingredients that are growing in NA Beverage Conversations (NA Beer, Wine and Spirits)

Ingredients	Share of Voice	Actual Growth	Growth Rate
Tulsi / Holy Basil	0.24%	4.32%	87.20%
Lion's Mane	0.19%	2.34%	69.46%
Reishi Mushrooms	0.77%	2.82%	33.46%
Ginseng	0.17%	0.55%	26.43%
Cranberry	1.65%	5.86%	14.18%
Kratom	0.11%	0.92%	13.10%
Beet / Beet Root	4.49%	7.68%	11.07%
Lavender	8.60%	5.92%	7.90%
Collagen	3.23%	1.58%	5.57%
Melatonin	0.50%	0.61%	3.62%
Probiotics / Prebiotics	9.33%	0.43%	0.37%
Caffeine	4.09%	0.16%	0.18%
Honey	12.97%	-2.82%	-1.34%
Ginger	14.97%	-4.58%	-2.17%
Cacao	1.50%	-0.87%	-2.32%



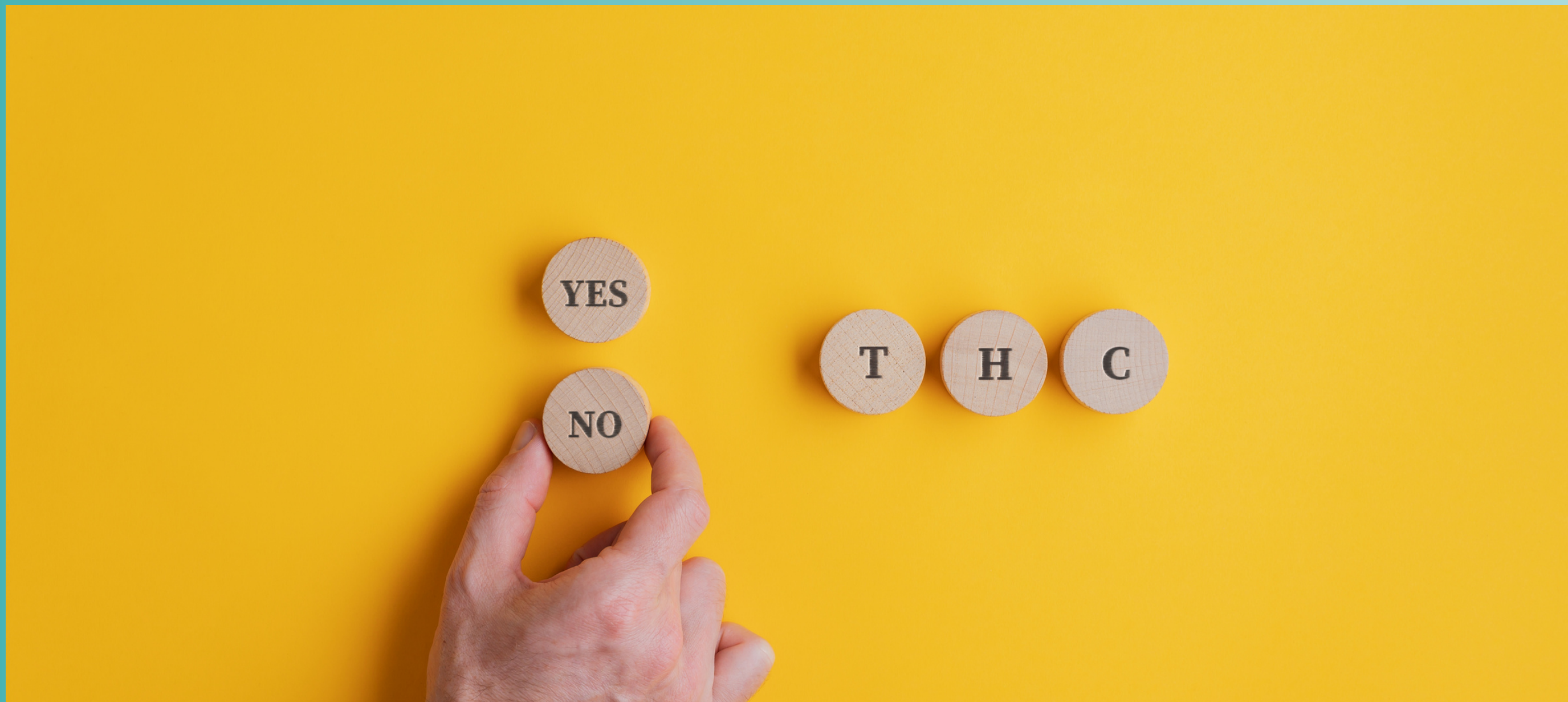
Top Conditions that are growing in NA Beverage Conversations (NA Beer, Wine and Spirits)

Condition	Share of Voice	Actual Growth	Growth Rate
Perimenopause / Meno...	4.09%	30.99%	12.73%
Nausea	0.34%	3.75%	10.66%
Difficulty Sleeping (falli...	2.85%	-1.29%	-1.20%
Celiac Disease / Glute...	6.94%	-12.75%	-1.79%
Digestive Conditions	4.09%	-6.72%	-2.32%
Anxiety	37.43%	-11.07%	-2.93%
Depression	4.27%	-8.14%	-3.00%

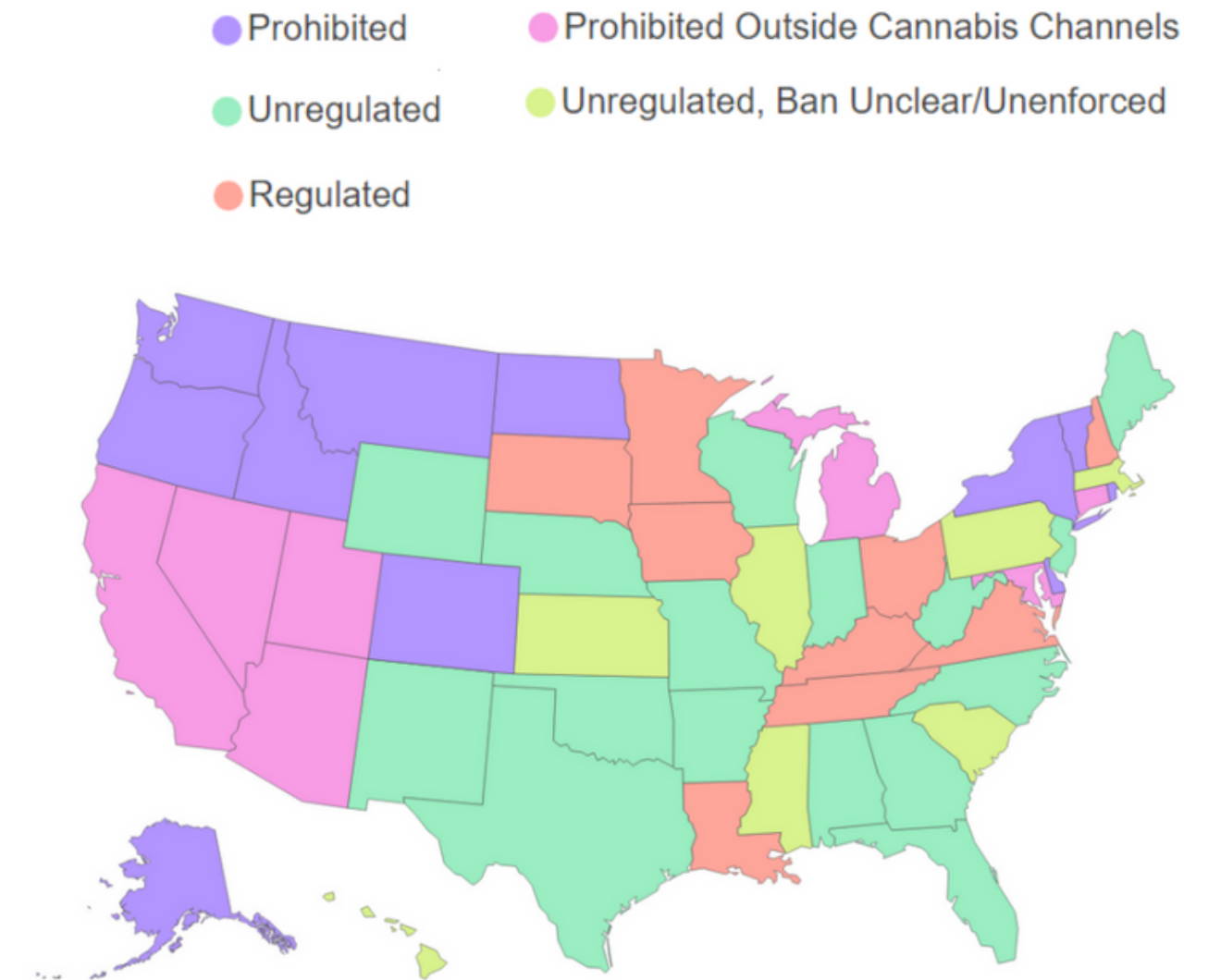




HEMP-DERIVED DRINKS



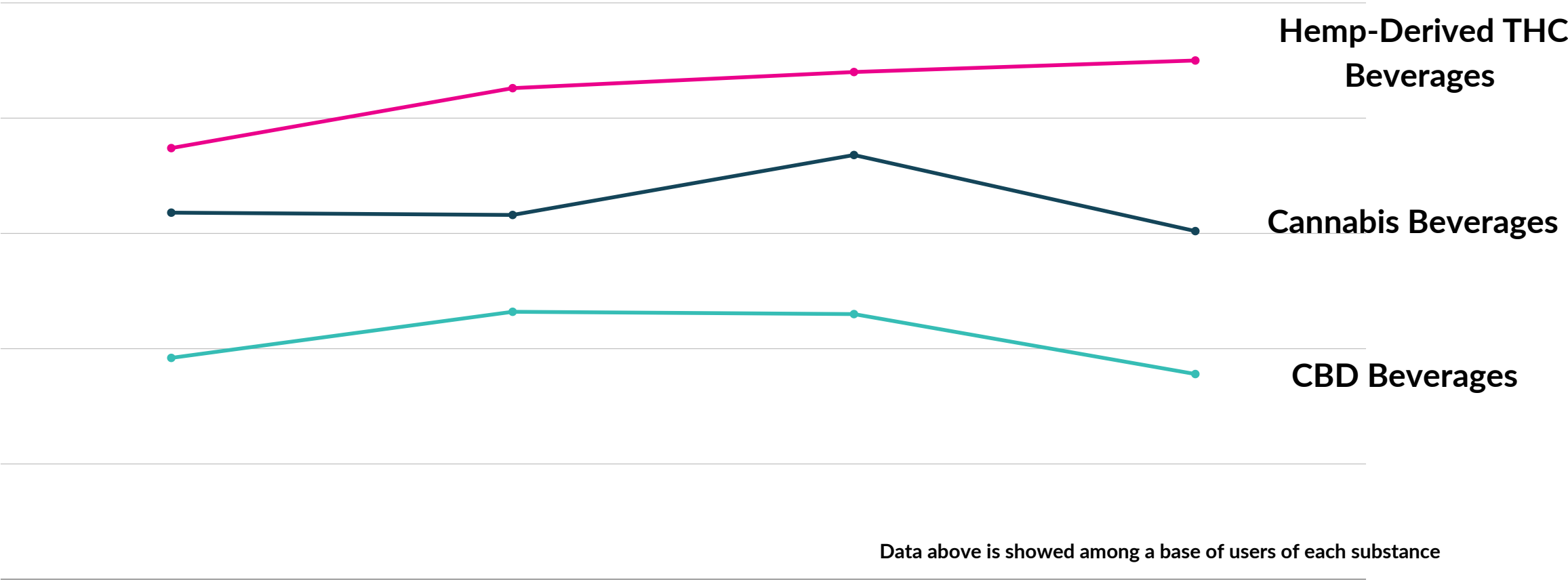
- “Hemp-derived THC” includes all the psychoactive cannabinoids that originate from hemp plants and contain less than 0.3% delta-9 THC
- Legal status varies by state and is gray
- Common types include delta-8, delta-10, HHC, THC-O, THCA, THC-P, hemp-derived delta 9
- Sold in vape & smoke shops, convenience stores, online, and in unregulated “dispensaries” that sell various cannabinoids. An unregulated dispensary usually does not ask for an ID to enter and does not have a security guard at the door.



Purchase of hemp-derived beverages continues to grow while cannabis and CBD beverages see declines

Growth in Beverages Purchased Past 3 Months

Brightfield Group CBD Consumer, Cannabis Consumer and Wellness Survey



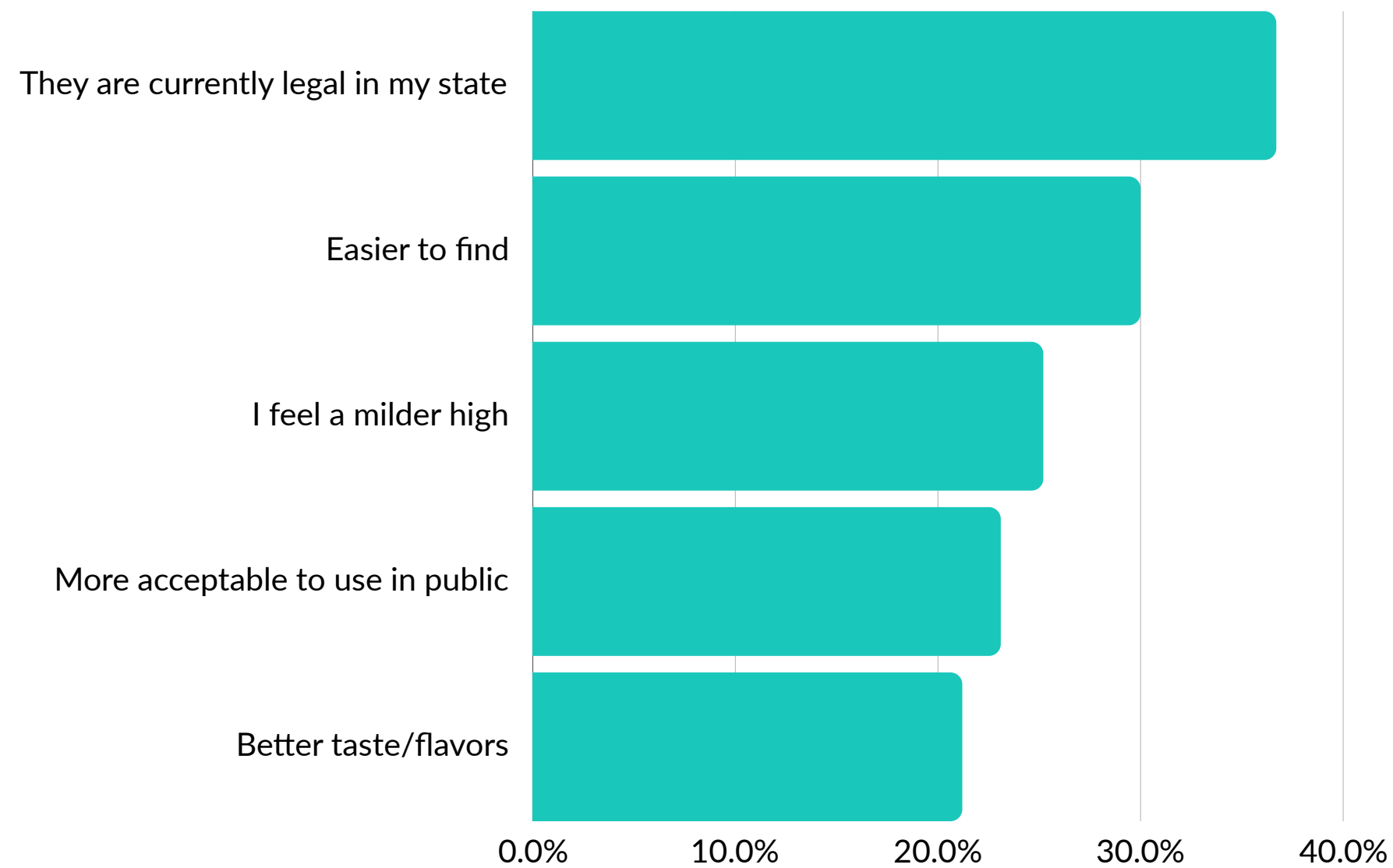
In Q4 2023, 10% of Americans report using hemp-derived THC



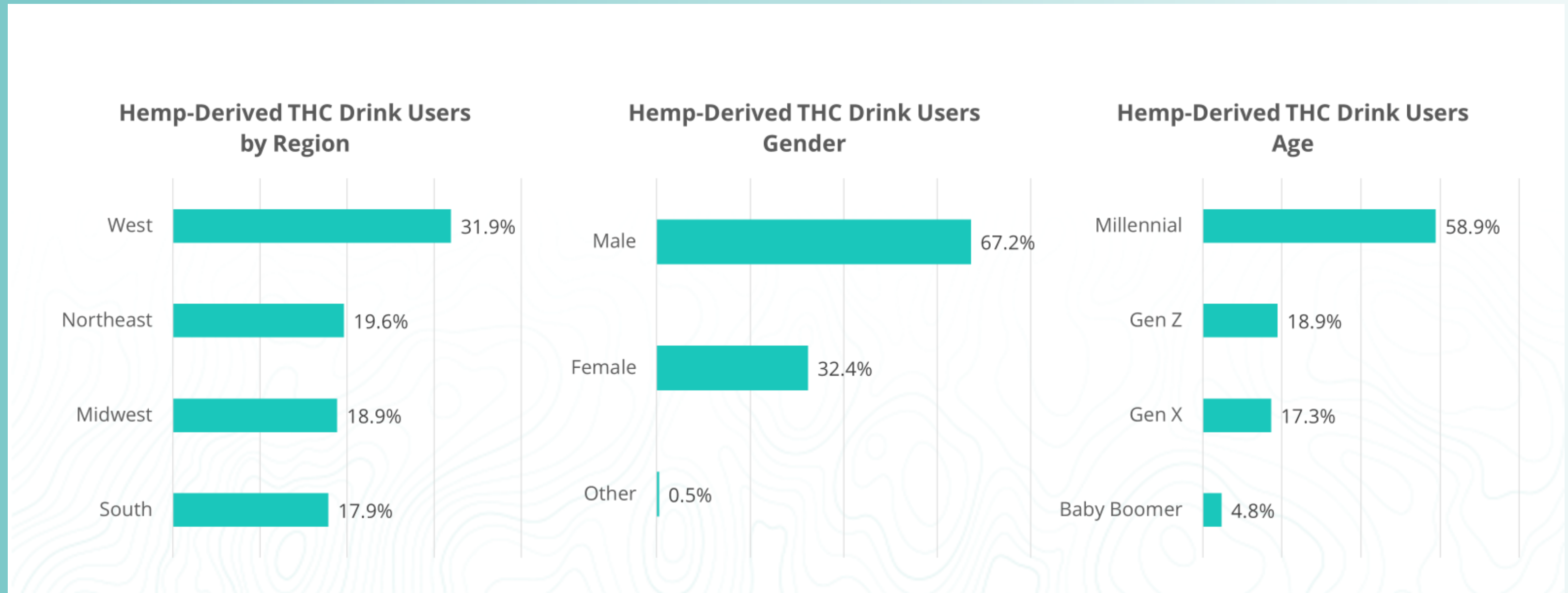
Ease of access is likely the driver

Hemp-Derived Beverage Reason for Use

Brightfield Group Quarterly Wellness Survey



Hemp-derived THC beverages are most commonly consumed by west coast state dwelling, younger (Gen Z or Millennials) Males



Hemp-Derived Drink Success Stories

2023 saw a wave of established cannabis brands like Cann and Keef expanding into producing hemp-derived THC beverages after gaining popularity in the dispensary. Meanwhile, other brands like Cycling Frog and Rebel Rabbit jumped straight into the hemp-derived space.



HEART HEALTH



According to our quarterly wellness survey, 25% of Americans say they have high cholesterol and 4% have heart disease

February

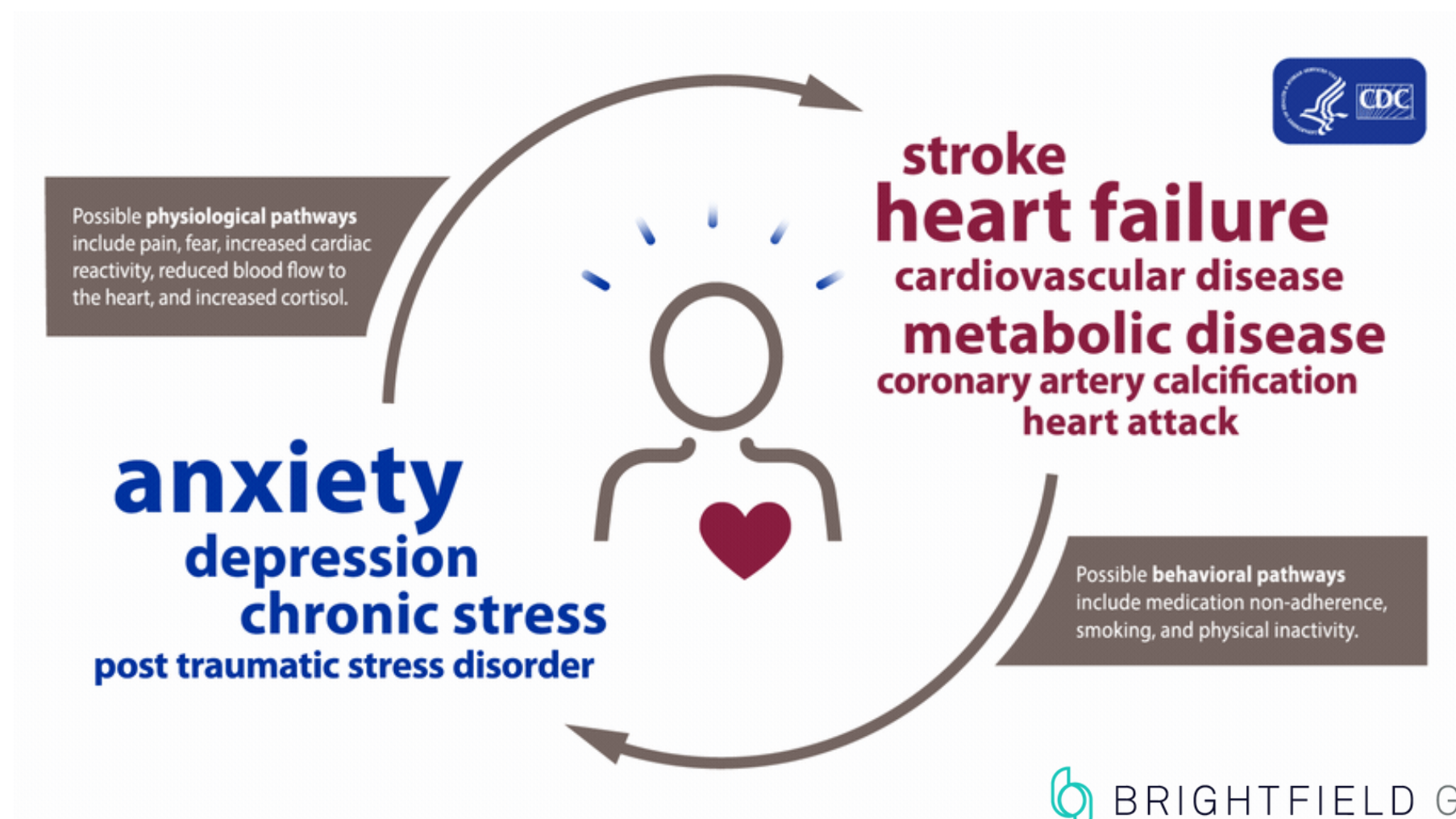


FEBRUARY IS
**AMERICAN
HEART
MONTH**



New Evidence Further Links Mental Health, Stress to Heart Health

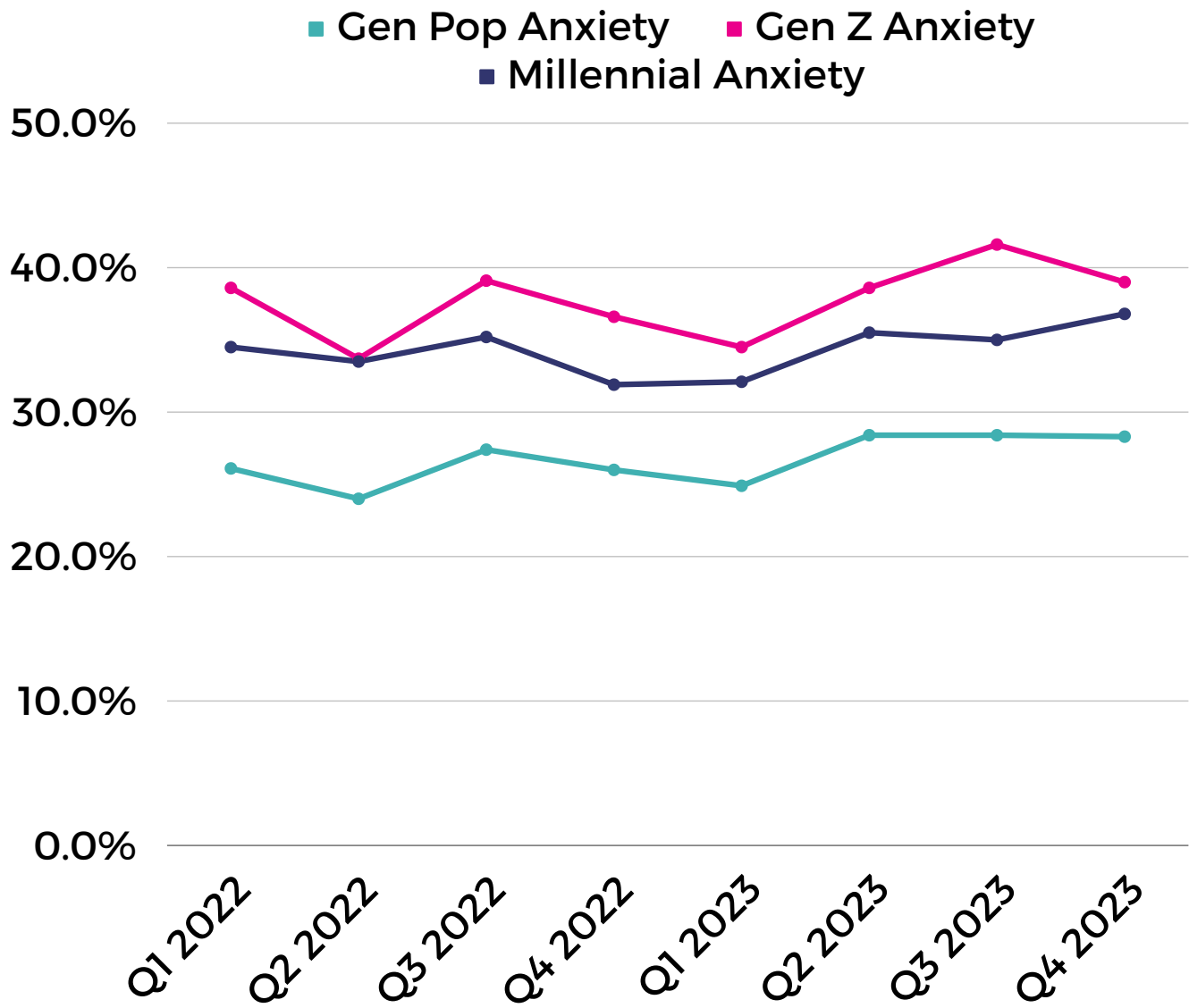
Written by Lisa O'Mary



Mental Health Epidemic in the U.S. Especially among youngest generations

Condition Incidence : Brightfield Quarterly Wellness Survey

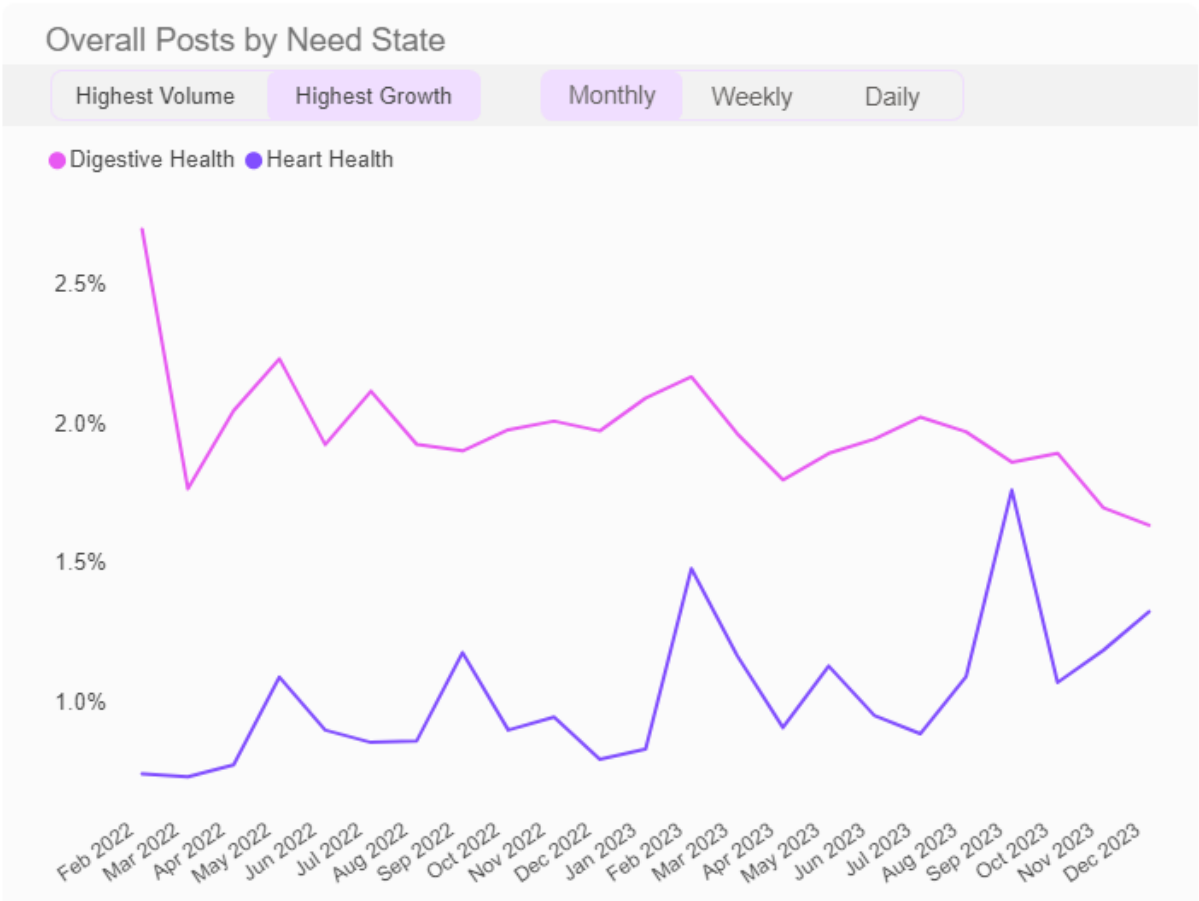
	Say they have depression	Say they have anxiety
Gen Pop	21%	28%
Gen Z	30%	39%
Millennial	25%	37%



Source: Brightfield Group - Quarterly Consumer Wellness Survey

Social Conversations about Heart Health

Social Posts about Heart Health Growth Over Time



Ingredients Mentioned Social Posts about Heart Health

Ingredients	Share of Voice	Actual Growth	Growth Rate
Kava	0.02%	0.57%	17.64%
Taurine	0.16%	0.18%	12.09%
Guarana	0.02%	0.03%	10.14%
Whey	0.28%	0.34%	9.86%
Berberine	0.43%	0.73%	8.00%
Fish Oil	3.40%	6.65%	7.64%
Ginkgo Biloba	0.26%	0.24%	7.64%
Charcoal	0.16%	0.21%	5.79%
Beet / Beet Root	3.48%	4.40%	5.19%
Chia Seeds	1.98%	1.65%	5.17%
Dha	0.85%	0.92%	4.74%
Omega 3 / Omega 6	14.20%	14.02%	3.82%
Reishi Mushrooms	0.34%	0.23%	3.50%
Ginseng	0.22%	0.08%	3.32%
Amla	0.31%	0.51%	3.01%
Lion's Mane	0.22%	0.13%	2.71%





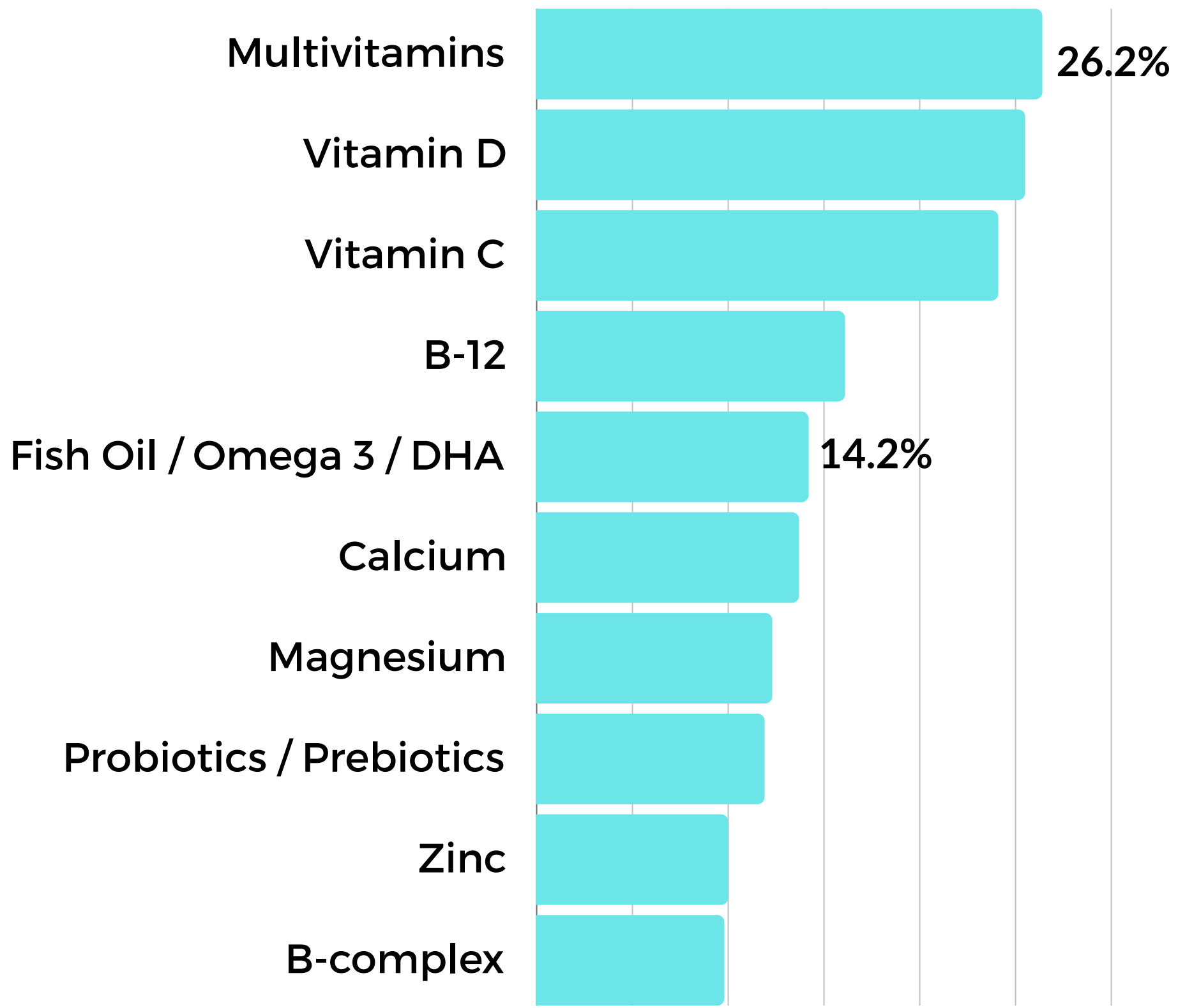
OMEGA 3 / FISH OIL



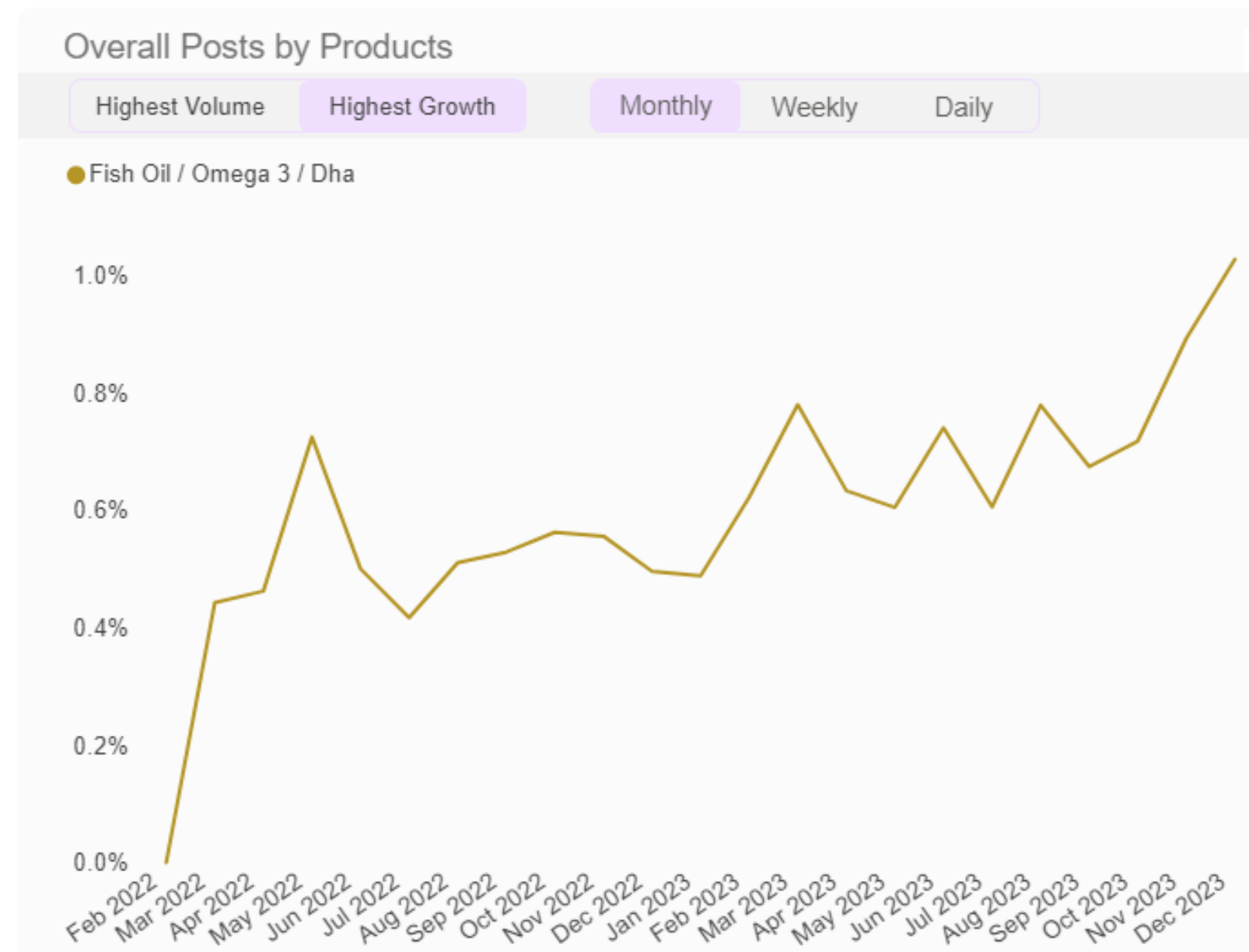


Supplement P3M Purchase Incidence

Brightfield Group Quarterly Wellness Survey

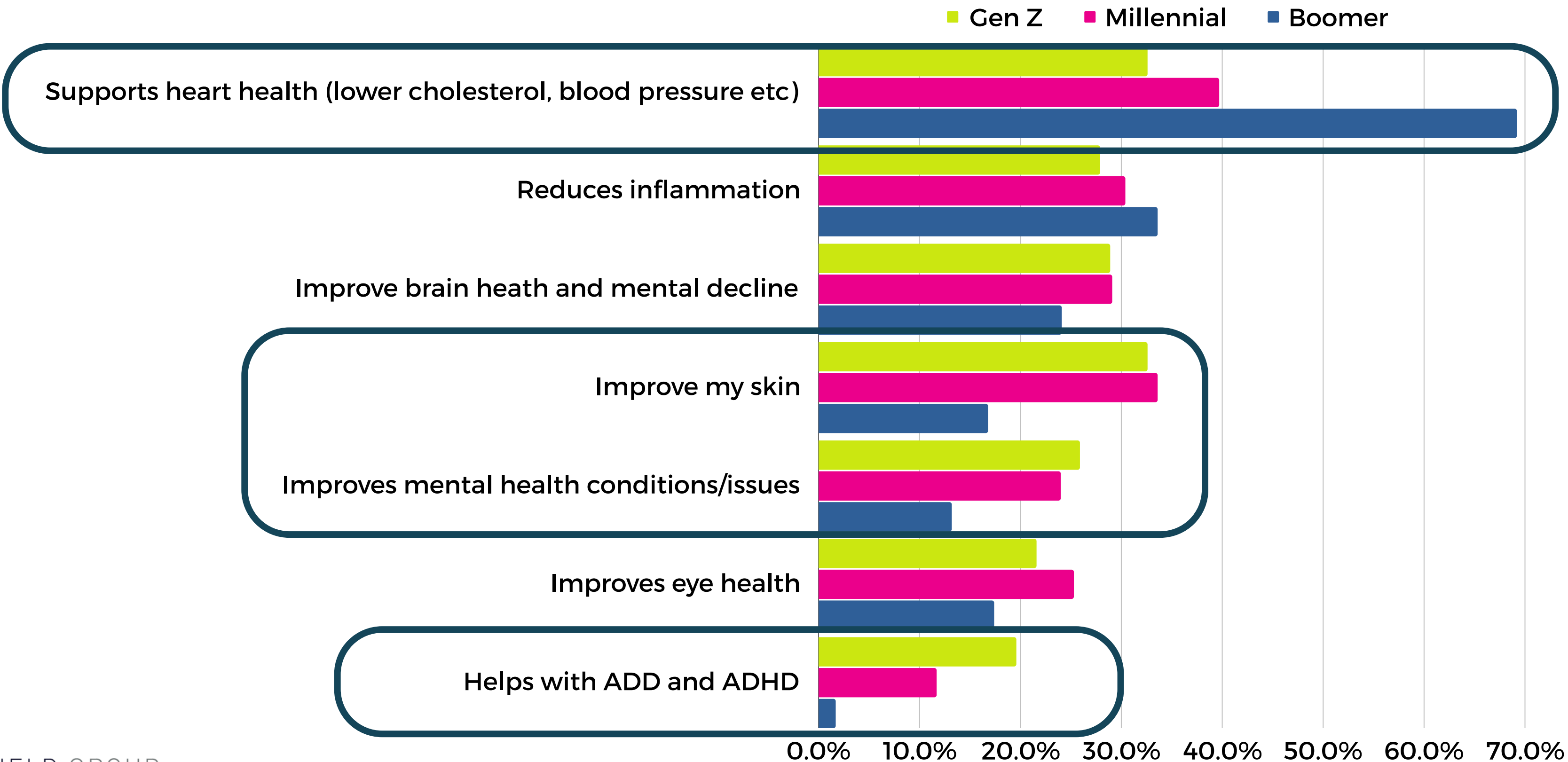


Social Conversations about Fish Oil / Omega 3

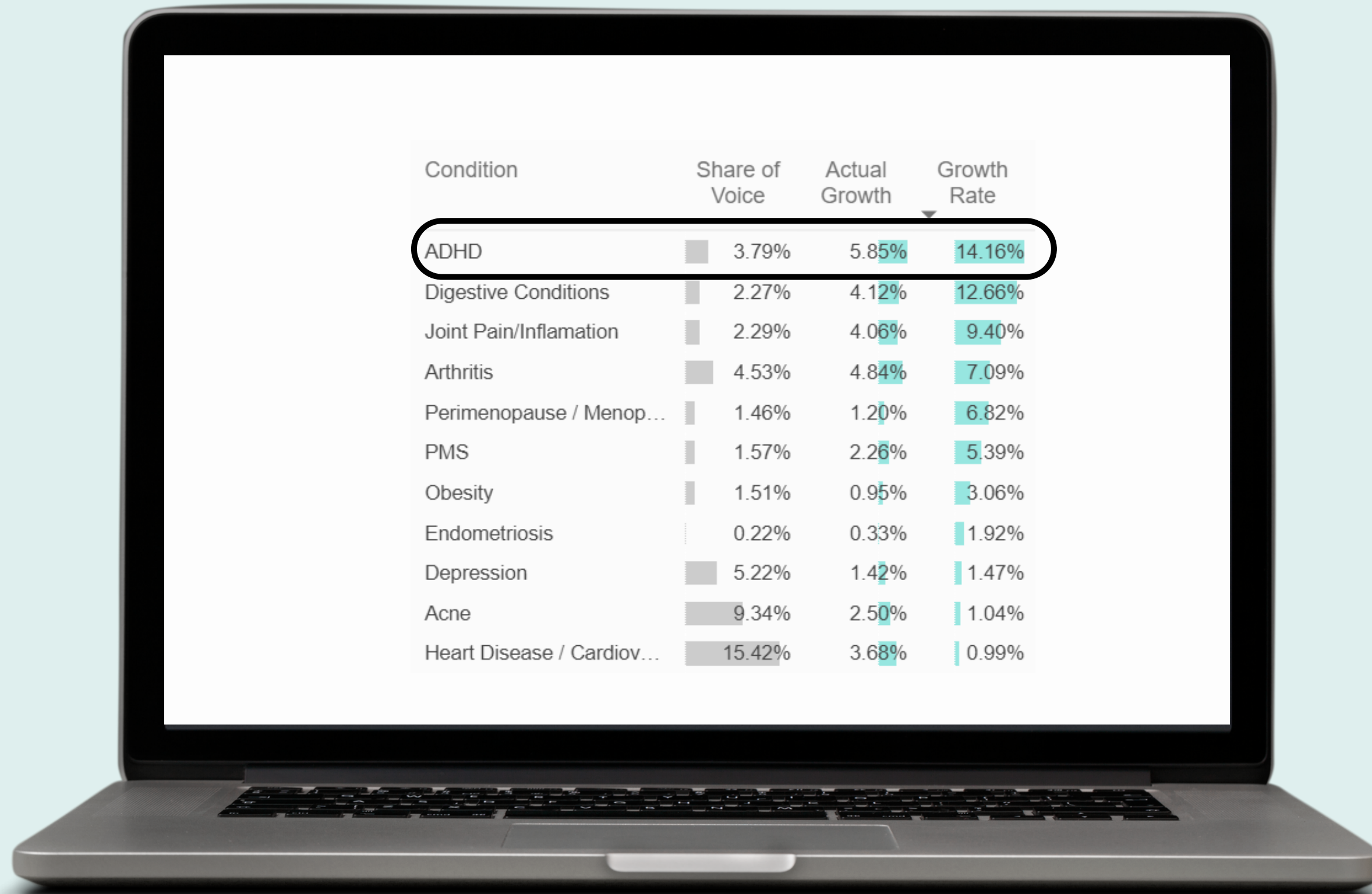


Source: Brightfield Group Wellness Social Listening

Reason for use of Omega 3 / Fish Oil differs by generation



ADHD is growing in Gen Z Social Conversations about Omega 3 / Fish Oil



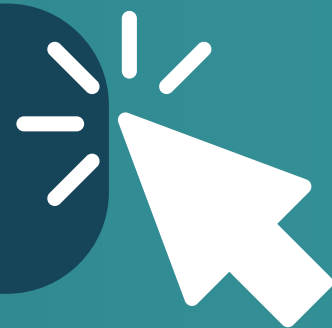
Source: Brightfield Group Wellness Social Listening



Stay ahead of all the wellness trends!

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

[Get in Touch!](#)



SNAPSHOTS

A Comprehensive Horizon Scanning Tool

Quickly understand your core
consumers with data from...

 BRIGHTFIELD GROUP

SURVEY

*Over 40,000 consumers
surveyed, & updated quarterly*

SOCIAL

*10 million+ social media
conversations collected*

Each Trending Product SNAPSHOTS Includes:

Trend Score

A quick look at where
the trend is headed

The Consumer

Know if this an area that
makes sense for your
brand's customers

Distribution

What are the
relevant channels for
this product trend

The Why?

Find out the
motivations driving
this product to trend

The Conversation

Know if this an area that makes
sense for your brand's customers

