



2024

GUT-DRIVEN WELLNESS: EXPLORING GLP-1, PROBIOTICS, AND FIBER

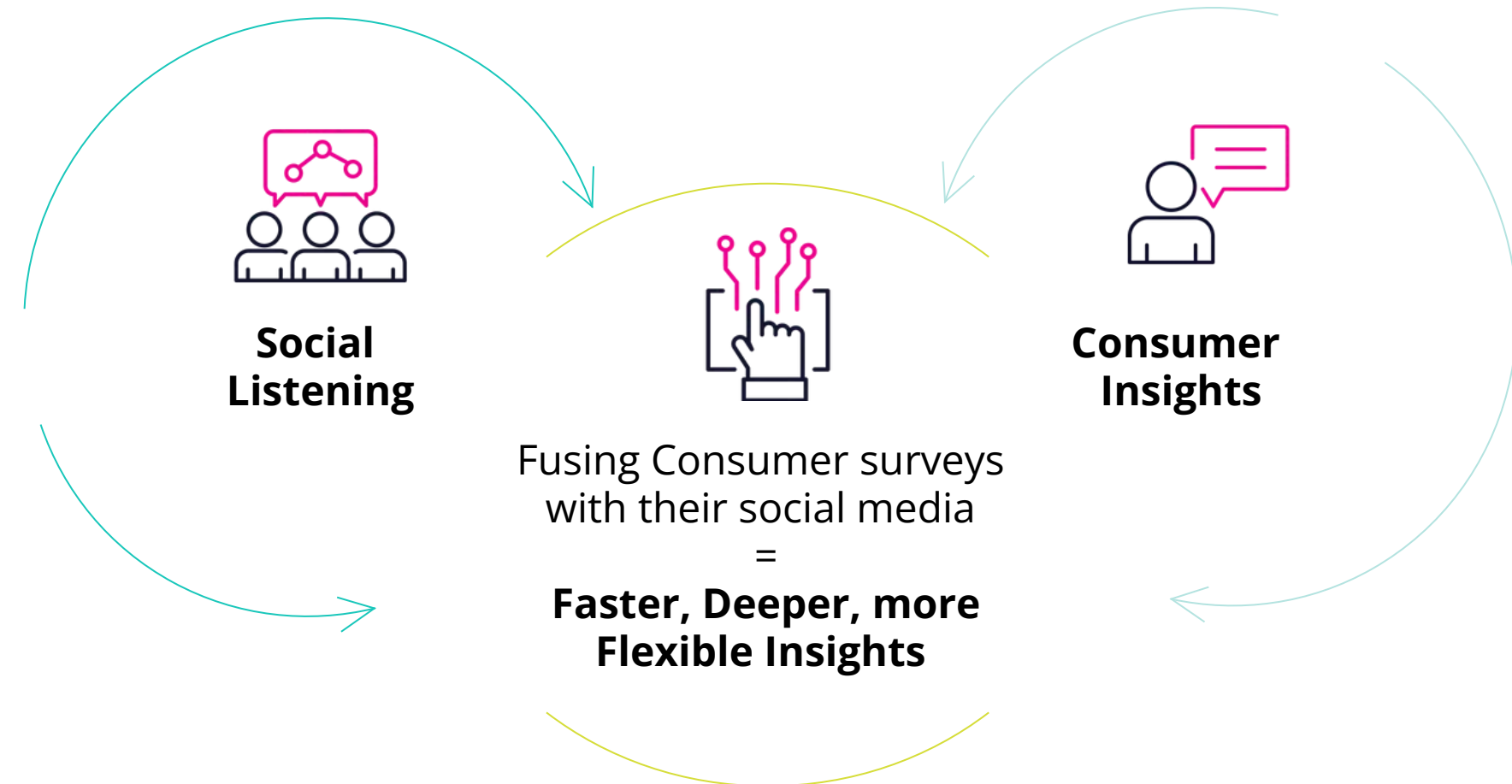
October Webinar - Based on Q3 Data
Click to watch the recording!

WELLNESS CPG STUDY

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



Methodology: Wellness CPG Study Sources

Full Wellness CPG Platform

Comprehensive and Dynamic Insights on CPG Trends

“Everything you need to know for when you need to be the expert in the room”

Social Listening Tracker



- 20 million + Conversations updated daily
- Tracking across Products, Sub-Products, Need States, Conditions, Flavors and Ingredients
- Verbatim mentions
- AI-Trained Persona Predictions

Consumer Insights Platform

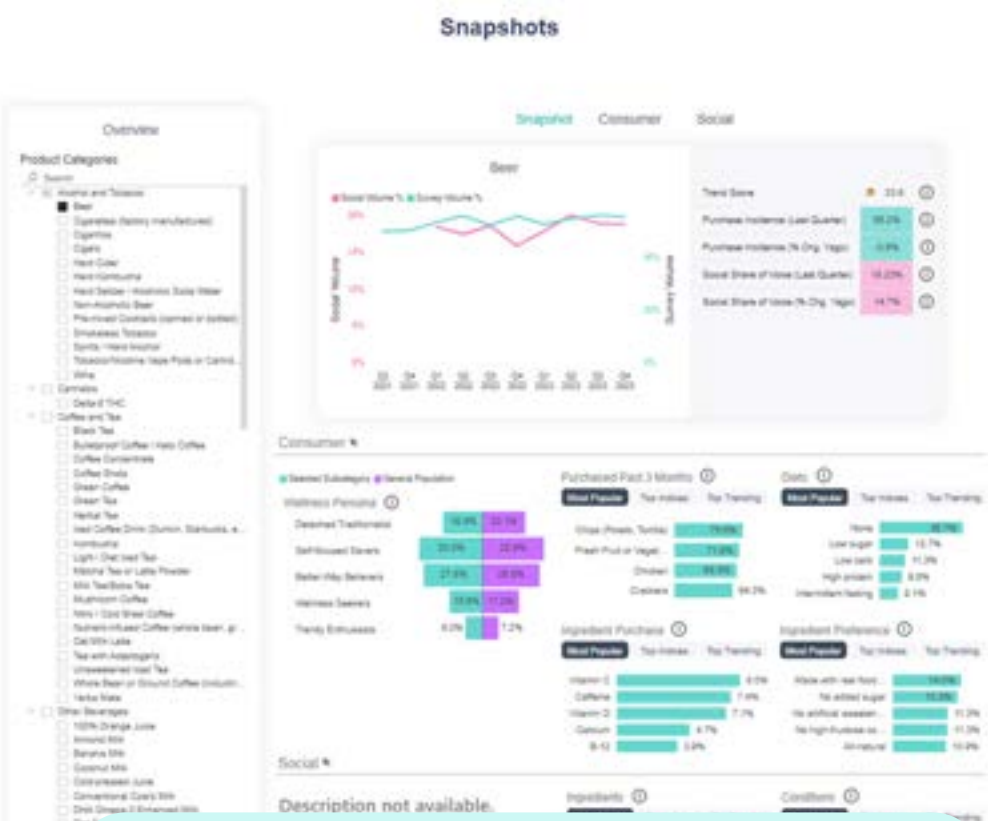


- Sample of 5,000+ US Adult Consumers per quarter, 40k+ total sample – (est. 2021)
- Usage of 300+ categories & ingredients
- Deep Behavioral and Lifestyle profiles
- Segmentation & Social integration

Snapshots

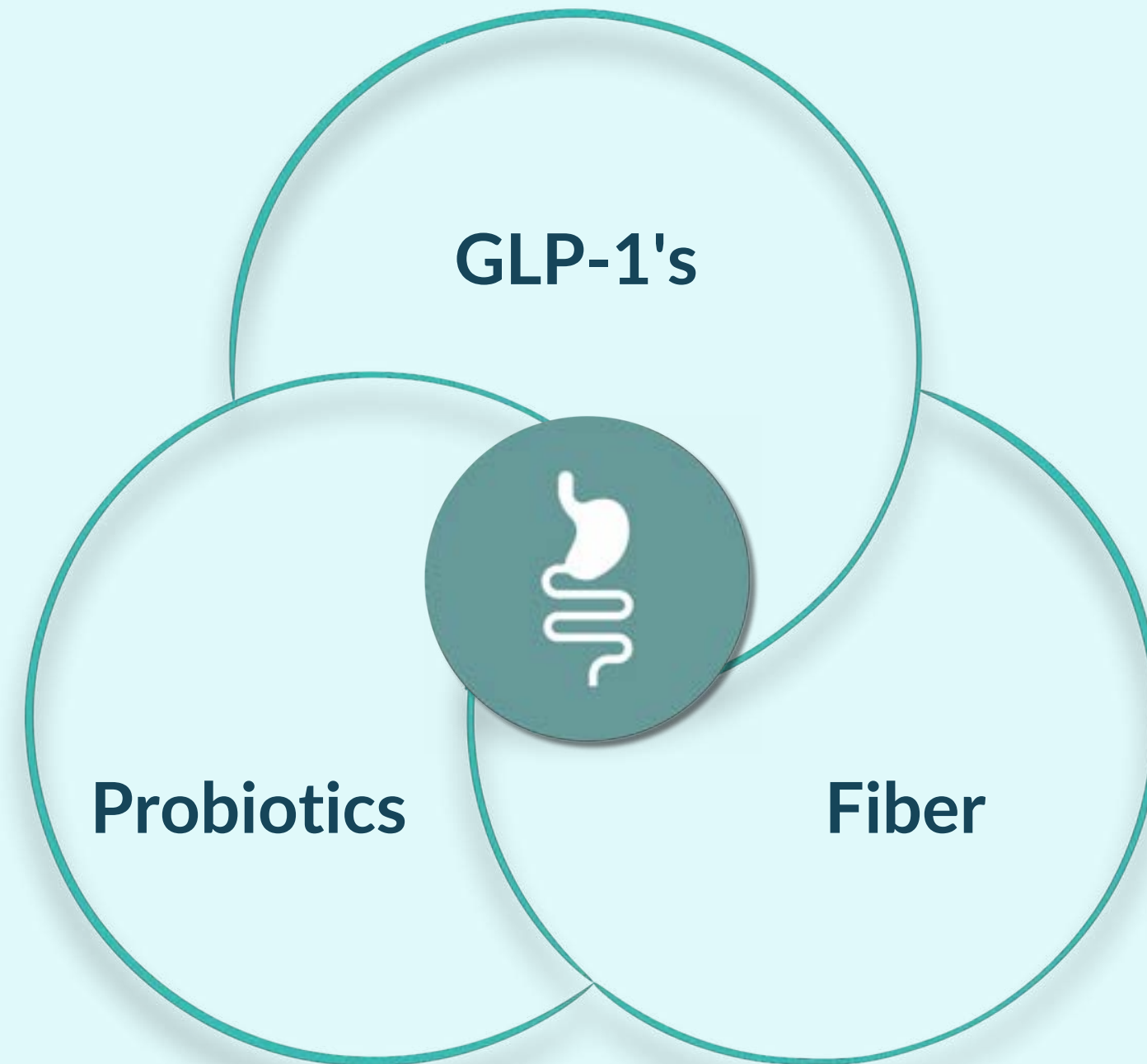
Concise Executive level Summary of CPG Trends

“For when you need to know enough to be dangerous”



The Snapshots are the result of the integration of the two sources in our larger Wellness CPG study.

Today's Topics are Intertwined



The gut as our motherboard

Hippocrates' ancient claim that "all disease begins in the gut"



45%

of Americans said they suffer from stomach aches at least a few times a month; 22% suffer weekly.
(BFG Q3 2024 Wellness Study)



53%

of Americans agreed that their gut health affects their wellbeing up from 45% in Q4 2023. When looking and Gen Z and Millennials, that number goes up to 58%. 55% agreed that functional foods can act as medicine.
(BFG Q3 2024 Wellness Study)



4x

Google search for the term "gut health" quadrupled since 2019 and doubled since Jan 2022.
(Google Trends)



1/3

A third of Americans are seeking out the label claim "supports digestive/gut health."
(BFG Q3 2024 Wellness Study)

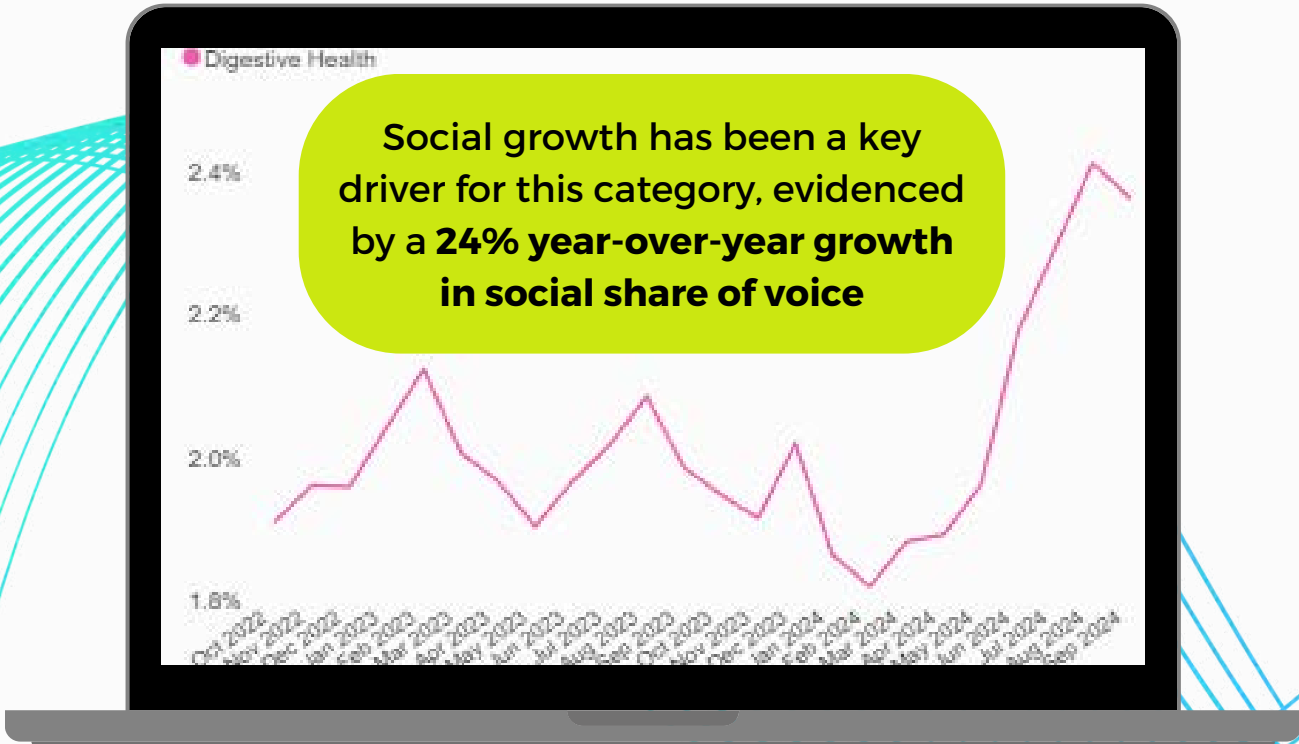
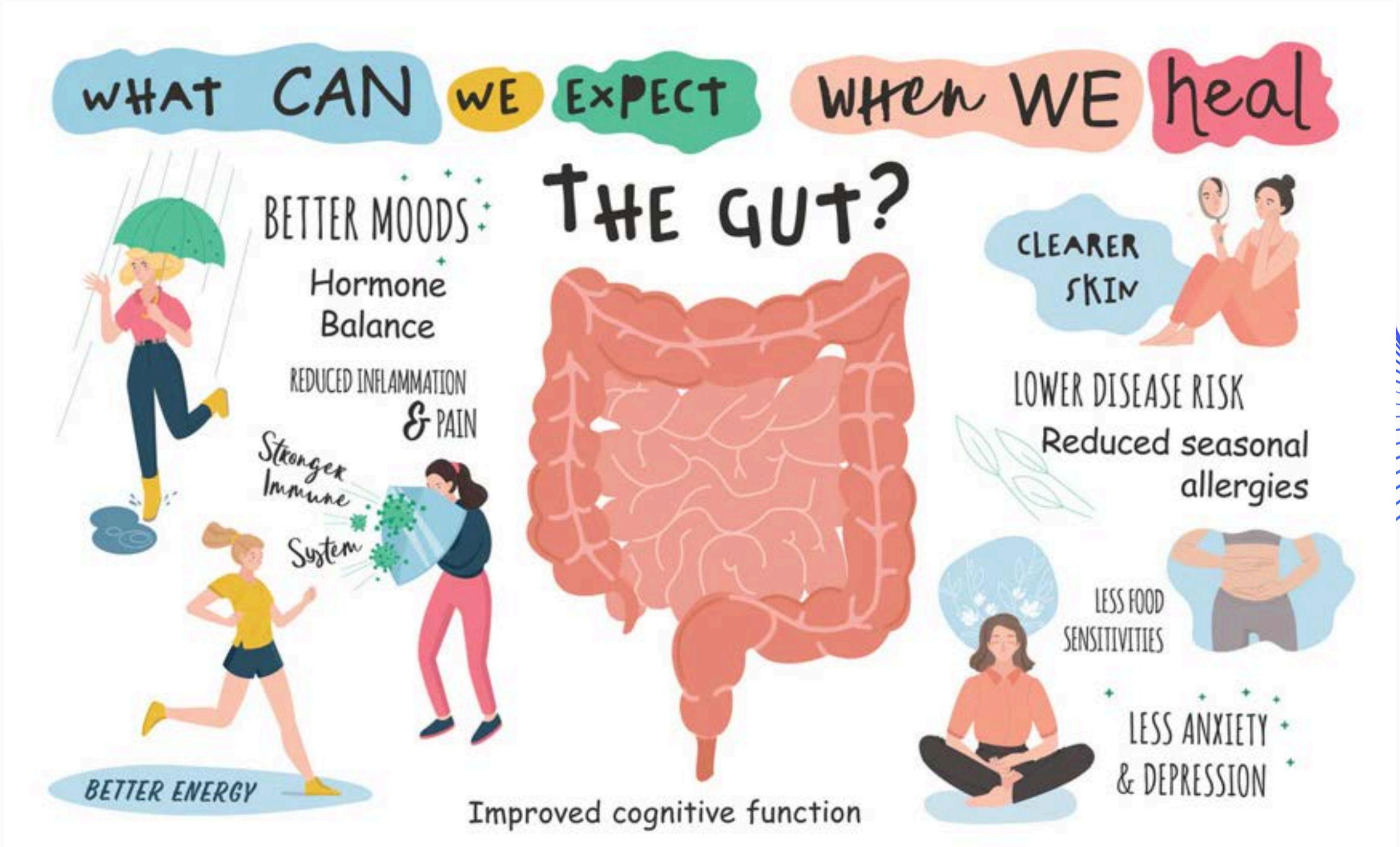
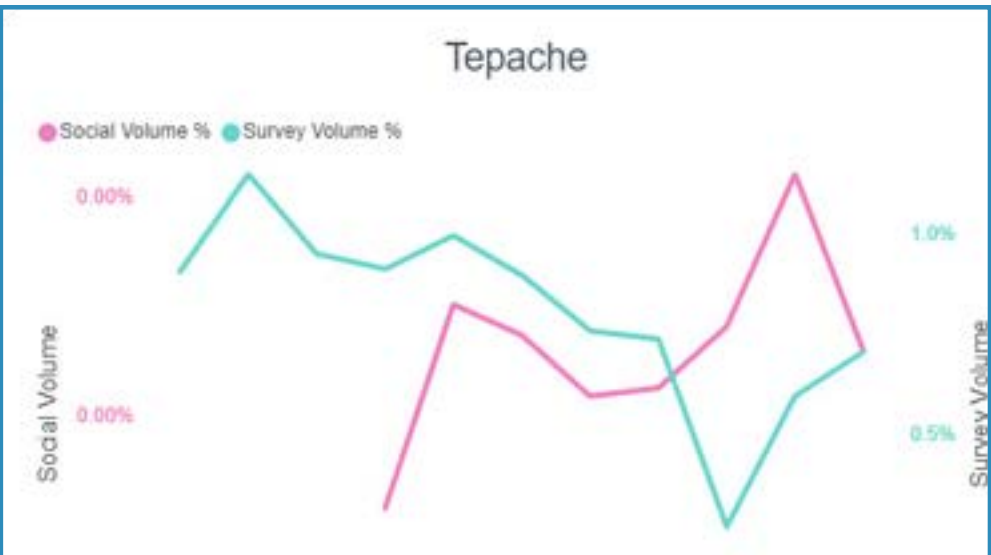
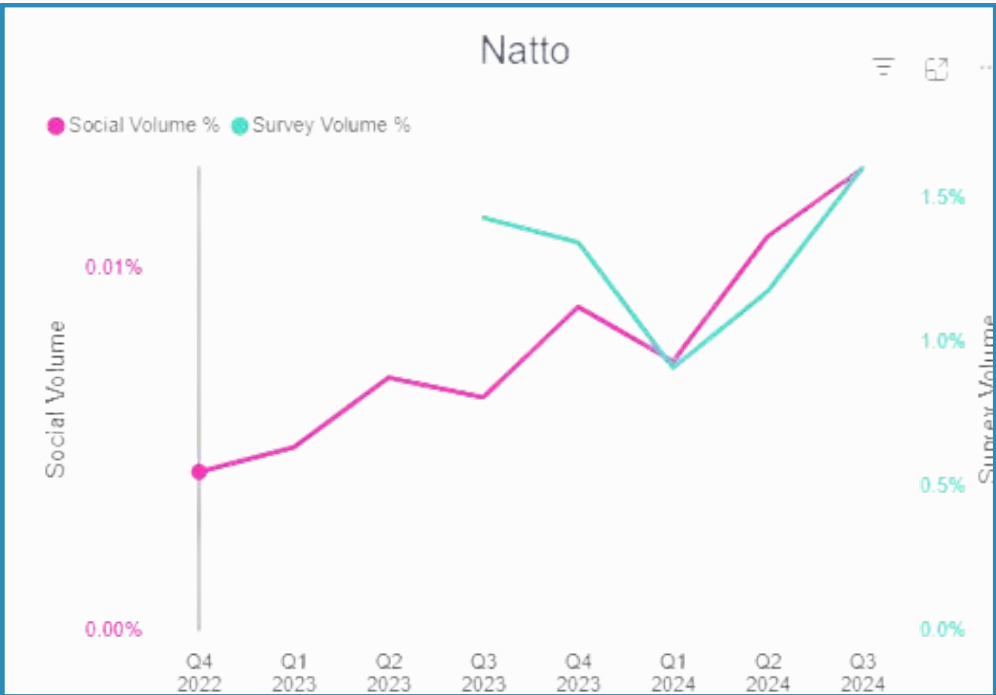
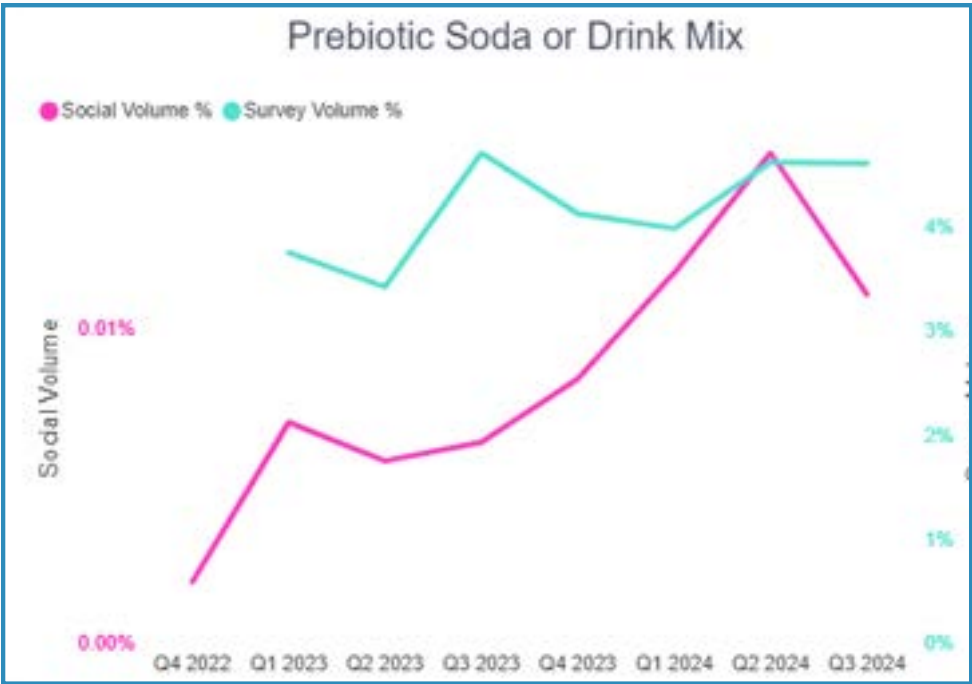


Photo Credit: Sun Warrior

Gut Health Innovations beyond Probiotics Supplements: Prebiotic Soda, Tepache, Natto

Ingredients that Over-index in Digestive
Health Conversations - Signals of New
Innovation



Ingredient Purchase i

Most Popular **Top Indices** Top Trending

Reishi Mushrooms	203.6
Probiotics / Prebiotics	201.9
Lactobacillus / Live Cultures	200.5
Turmeric	199.6
Magnesium	198.1
Ginger	195.2
Apple Cider Vinegar	192.3
Spirulina	191.4
Licorice Root	187.7
B-12	187.2



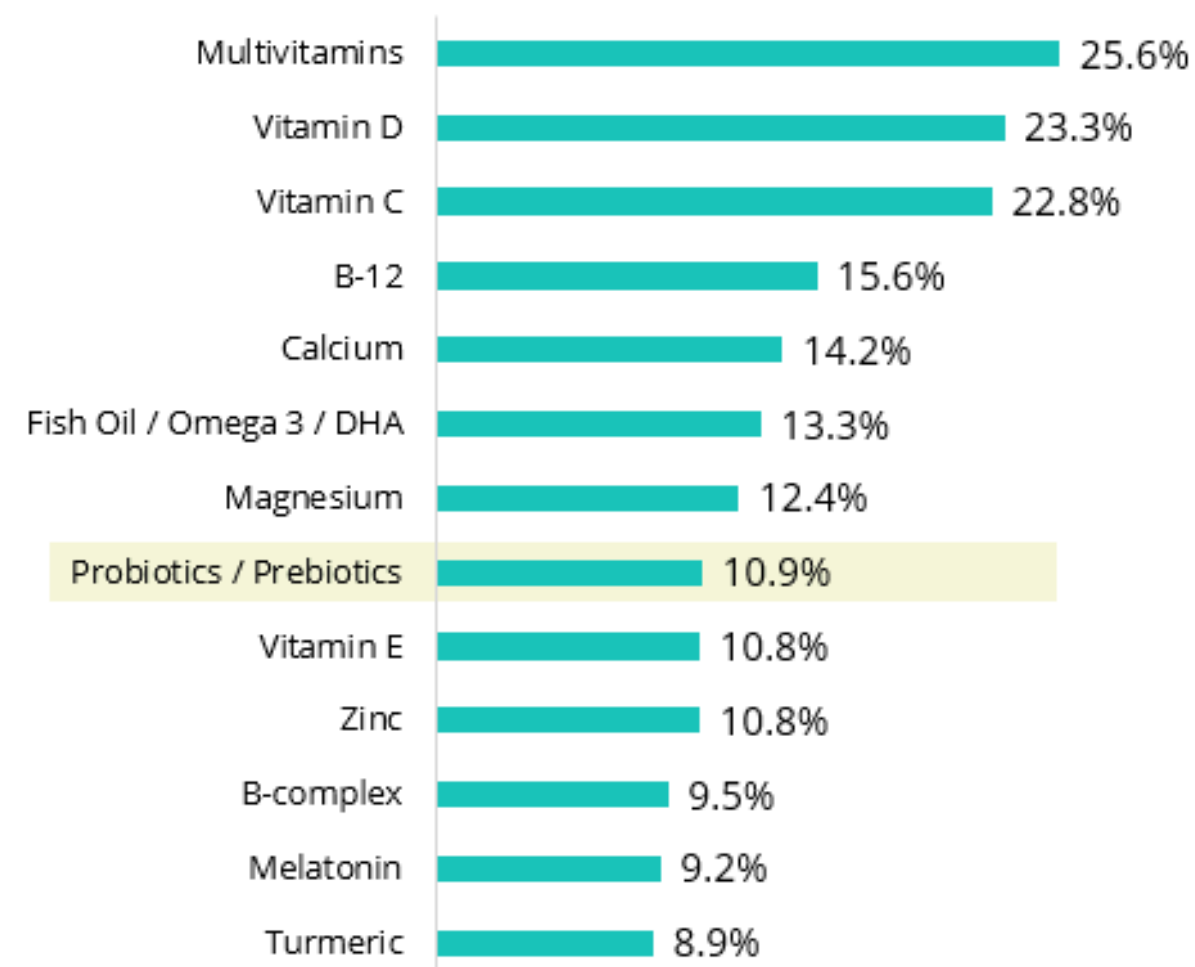


PREBIOTICS/ PROBIOTICS/ POSTBIOTICS

11% of U.S. adults have purchased a probiotic/prebiotic supplement in the Past 3 Months

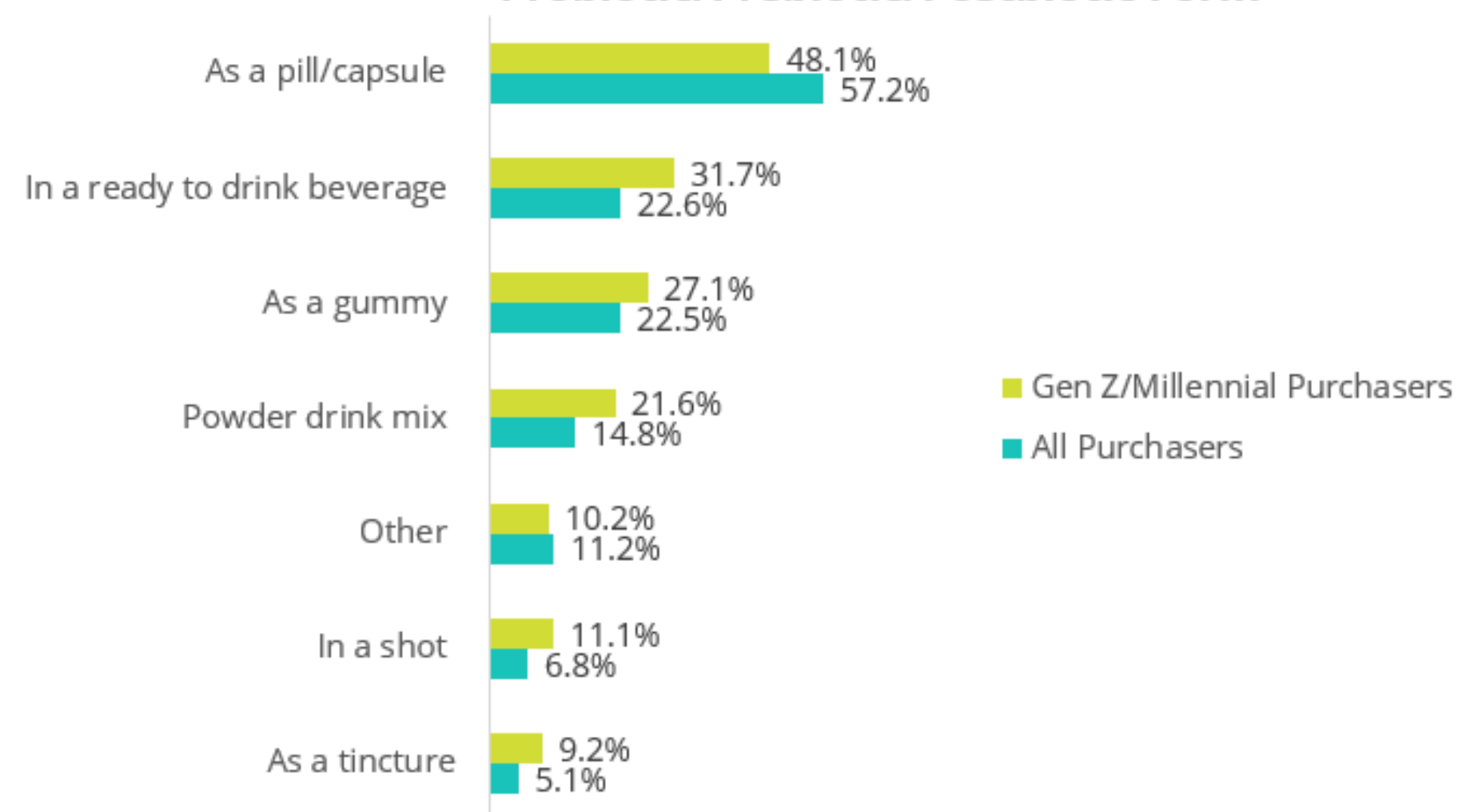
Probiotics are in top 10 Supplements Purchased

Supplement Purchase Incidence P3M (Q3 2024)



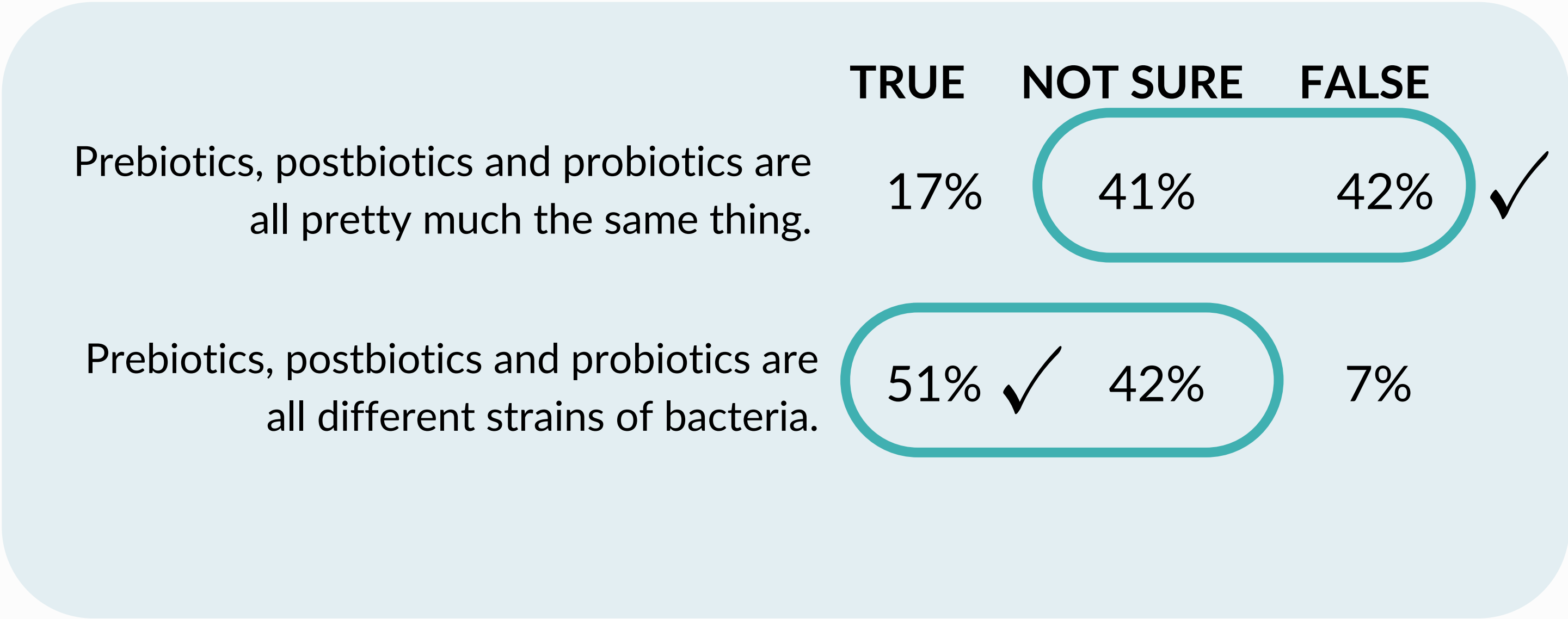
Source: Brightfield Group; Wellness Consumer Insights; Q3 2024

Probiotic/Prebiotic/Postbiotic Form



Source: Brightfield Group; Wellness Consumer Insights; Q2 2024

Some users know there is a difference between probiotics, prebiotics and postbiotics but arent sure what that difference is



Users are unsure when it comes to understanding probiotics/prebiotics/postbiotics

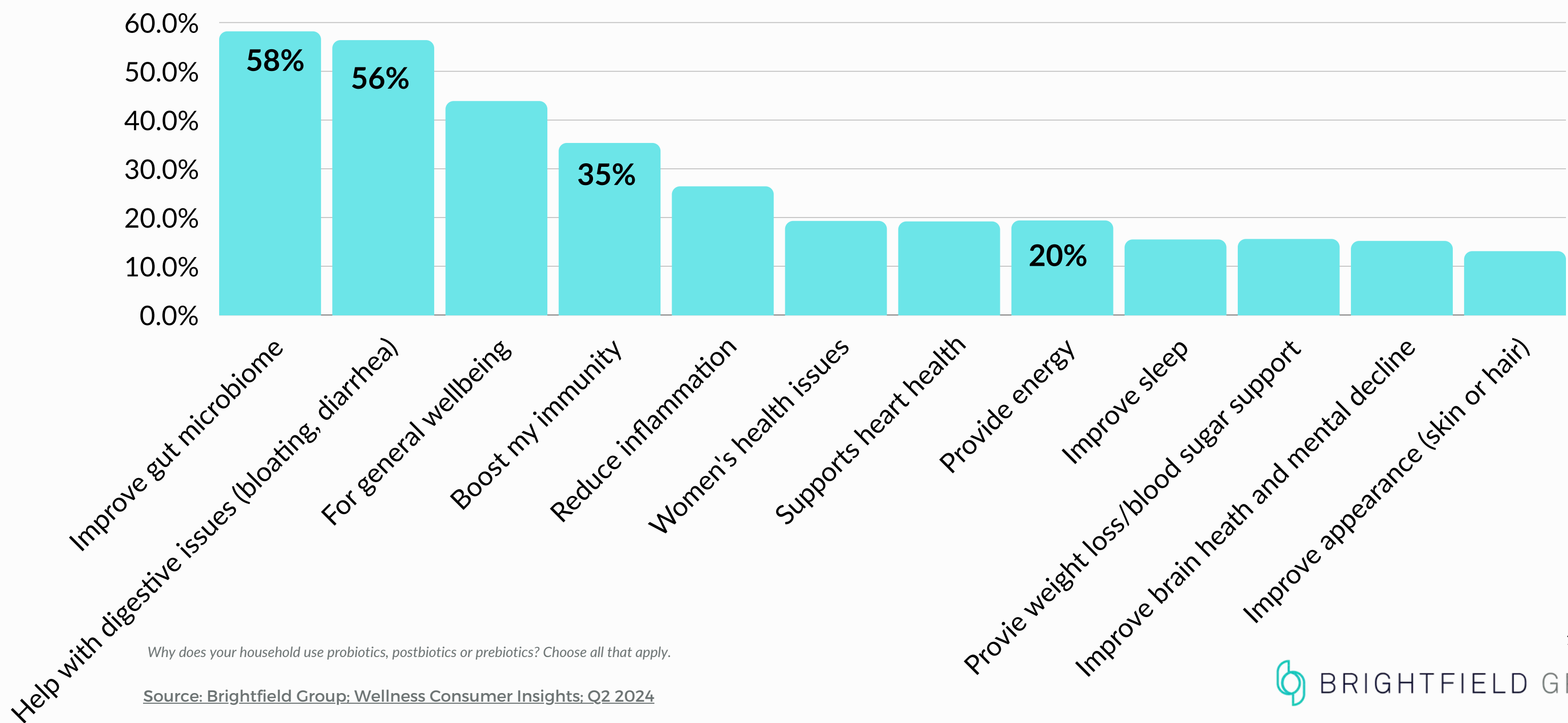
	TRUE	NOT SURE	FALSE
Prebiotics are foods (typically high-fiber foods) that act as food for human microflora	41% ✓	53%	6%
Probiotics are live microorganisms while postbiotics and prebiotics are not.	27% ✓	64%	9%
All fermented foods have probiotics	31%	57%	12% ✓





Probiotics

Improving gut microbiome and digestive issues are top reason for use but a third are using for immunity, a quarter for inflammation and fifth for energy, heart health and women's health issues.



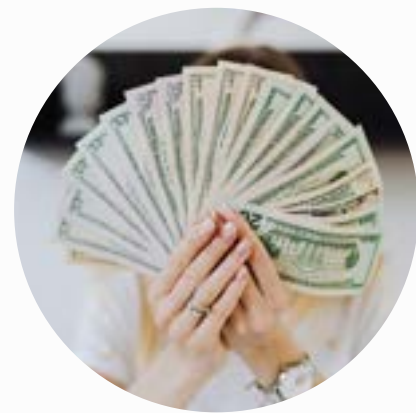
Who are Probiotic Users?



66% are Female



34% are Boomers
30% Millennials
30% are Gen Xers



43% are high income



44% are Suburbanites



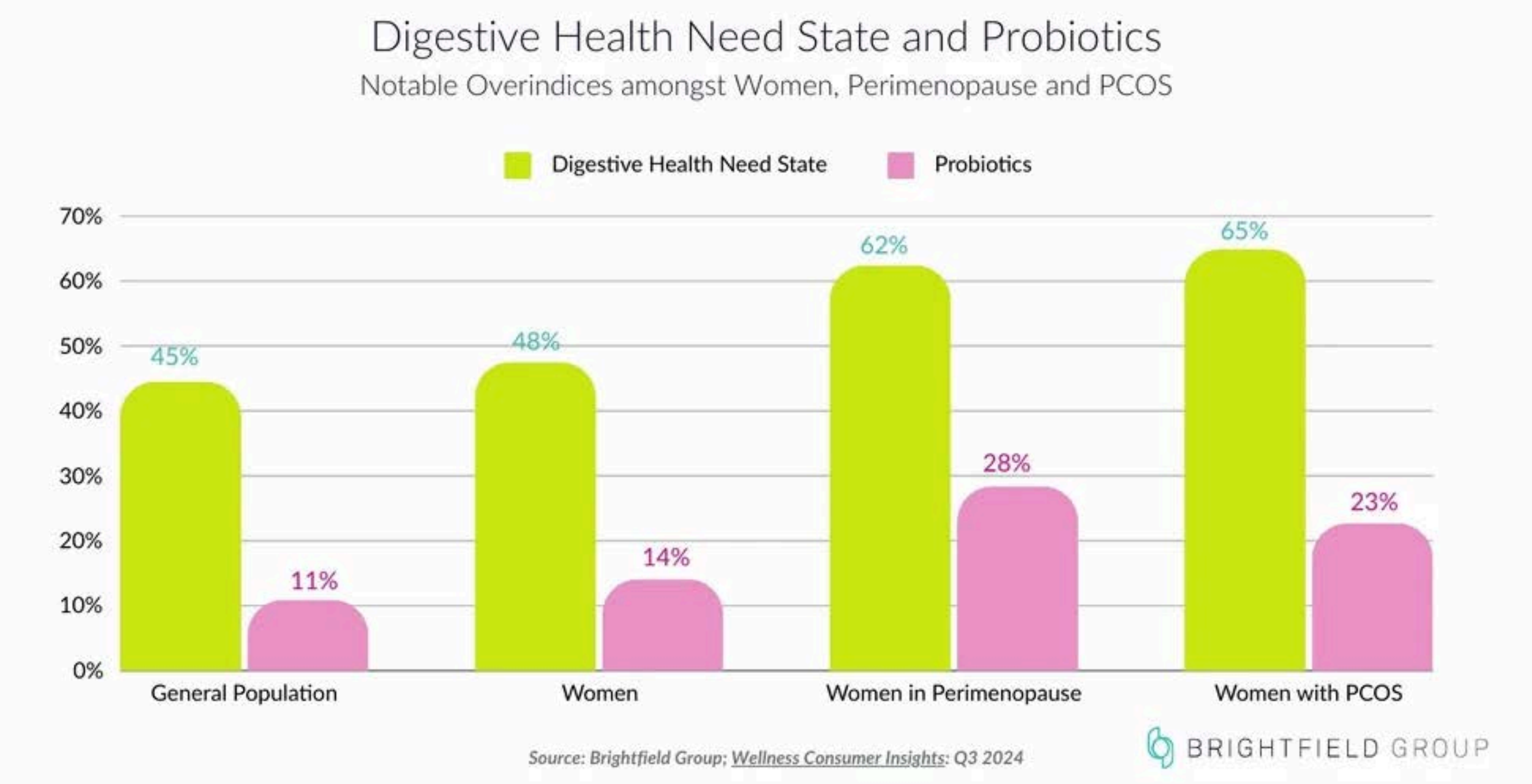
51% are married



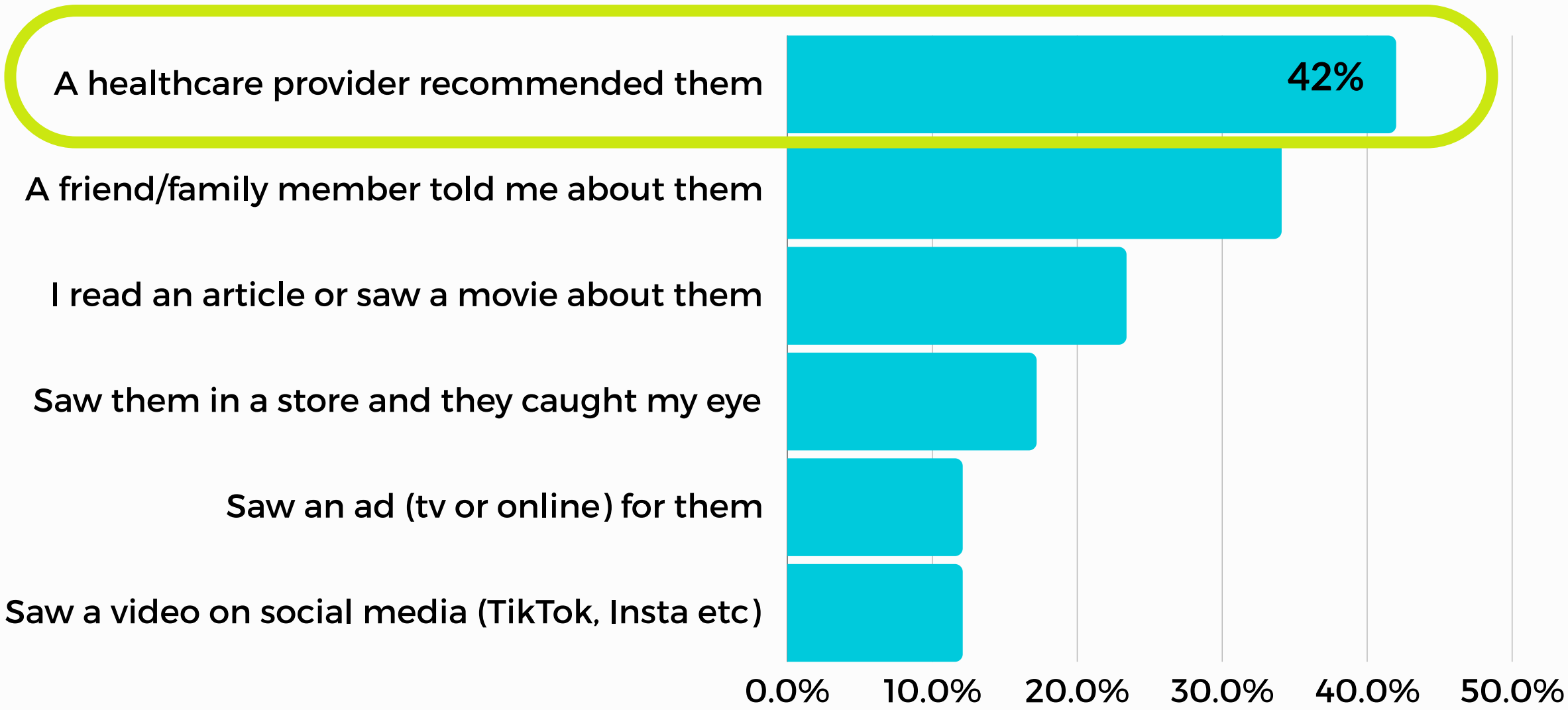
73% agree gut health affects wellbeing



Probiotic use is particularly important for Women, and women experiencing certain health stages like Perimenopause or PCOS



4 in 10 purchasers said a healthcare provider convinced them to try probiotics/prebiotics/postbiotics





GLP-1/OZEMPIC CRAZE REVISTED

What is GLP-1?

GLP-1 is a hormone that your small intestine makes. It has several roles, including: Triggering insulin release from your pancreas: Insulin is an essential hormone that allows your body to use the food you eat for energy. It lowers the amount of glucose (sugar) in your blood.



What are GLP-1 Medications?

Glucagon-like peptide-1 (GLP-1) agonists and GLP-1/GIP receptor agonists are drugs that mimic GLP-1 hormones effects on GLP-1 receptors throughout the body.

The Ozempic/Semaglutide Craze Moves Beyond Celebrities



Sponsored

Henry Meds
<https://www.henrymeds.com/>

Delivered to Your Door - GLP-1 Meds Without Insurance

Transform your body with GLP-1 meds. Includes online visit & meds. No insurance needed. GLP-1's delivered to your door.
\$197/month Semaglutide - Oral Semaglutide, \$149/mo - Tirzepatide Only \$349/mo.
Fall Sale: \$100 off Prime Sale - Code Fall100 - Valid Oct 4 - Oct 10

Sponsored

Ro
<https://www.ro.co/glp-1/ozempic>

Start Today for only \$99 - Ozempic(semaglutide) Rx online

See safety info, incl box warning. Supply limited. \$99 first, then \$145/mo. Meds excl. 1:1 health coaching from dedicated healthcare...
Semaglutide: \$249/month - Get GLP-1 Medication - Buy Semaglutide Online
Deal: \$46 off First Month

Sponsored

Pure Medical Spa
<https://www.puremedicalspa.us/>

\$49 GLP-1 Weight Loss Per Week

Same Active Ingredient GLP-1 as in Ozempic as FDA-Approved Treatments.
4801 Golf Road, Skokie, IL - Open today - 9:00



CNN Health Life, But Better Fitness Food More

Watch

GLP-1 pills are coming, and they could revolutionize weight-loss treatment

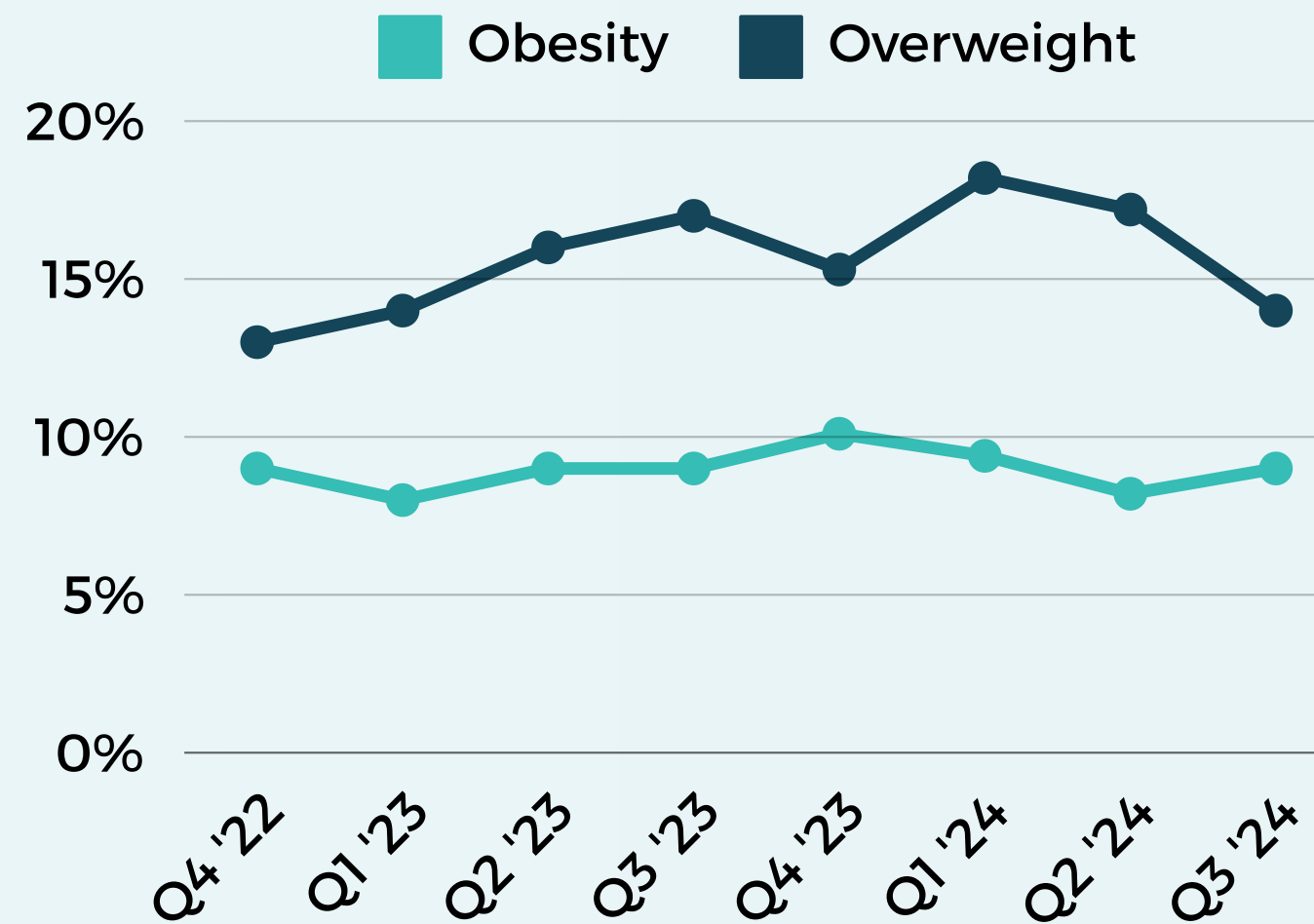
By [Meg Tirrell](#), CNN
5 minute read · Updated 11:45 AM EDT, Tue September 17, 2024

Defining the Weight Loss Need State

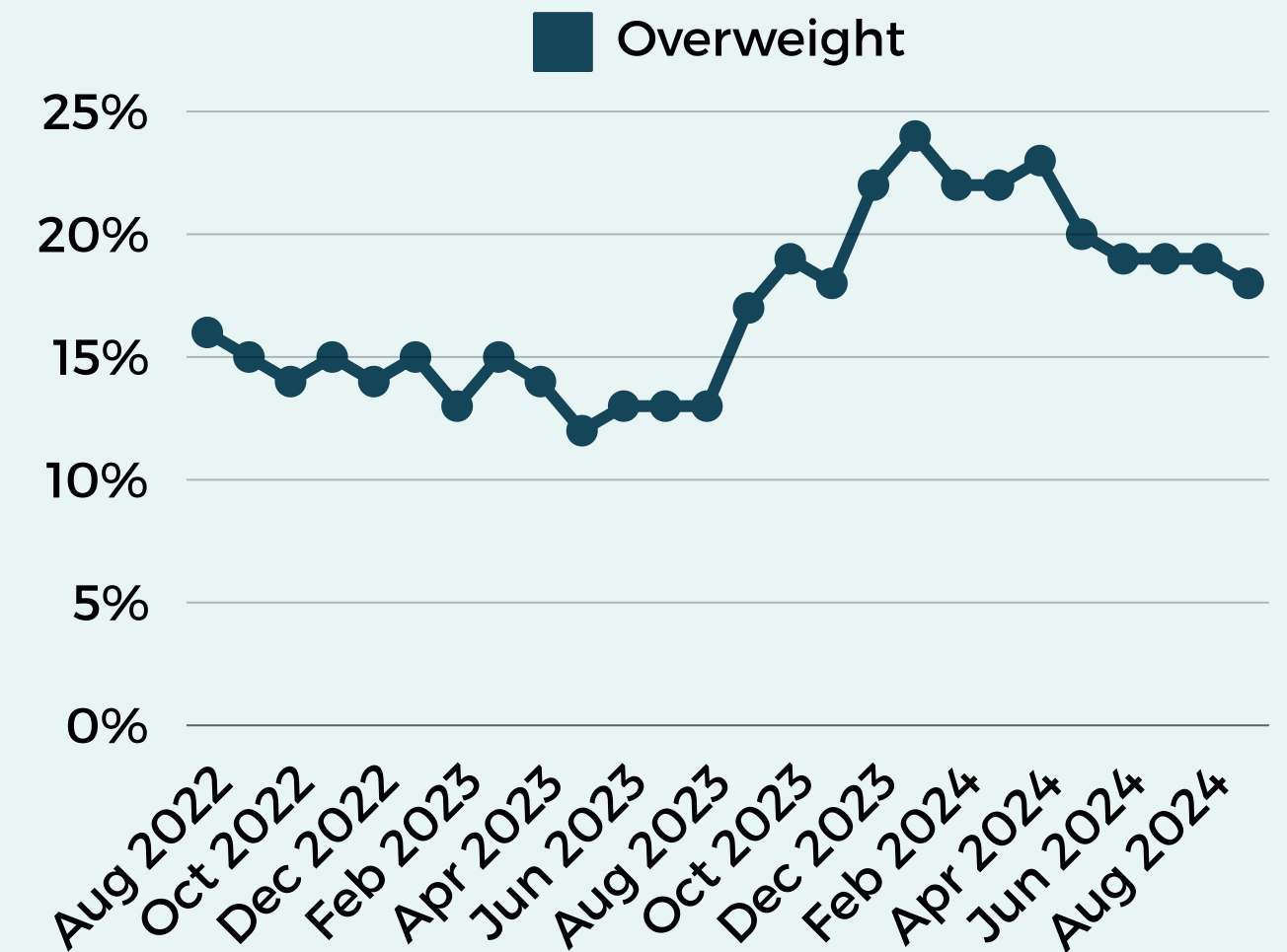
SEMAGLUTIDE



Q3 Panel Data: Obesity & Overweight

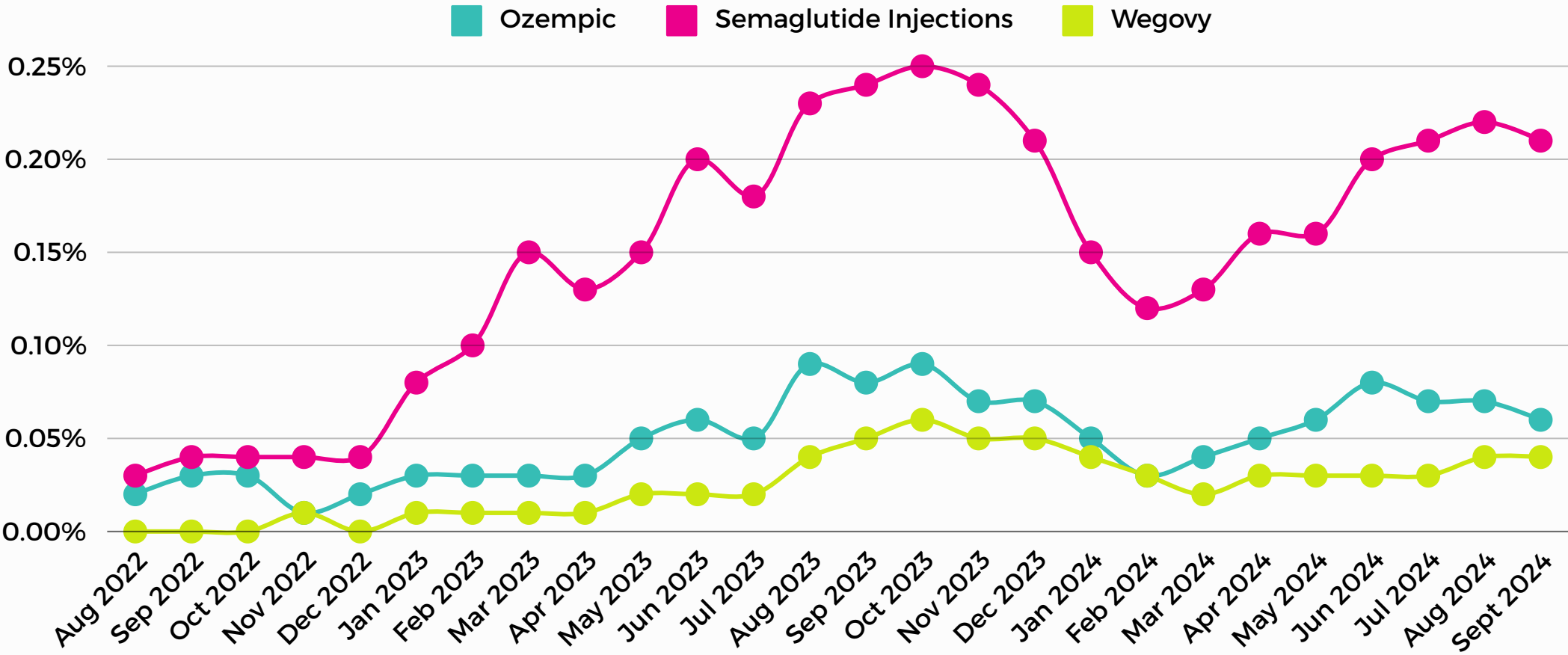


Social Listening Trends: Overweight



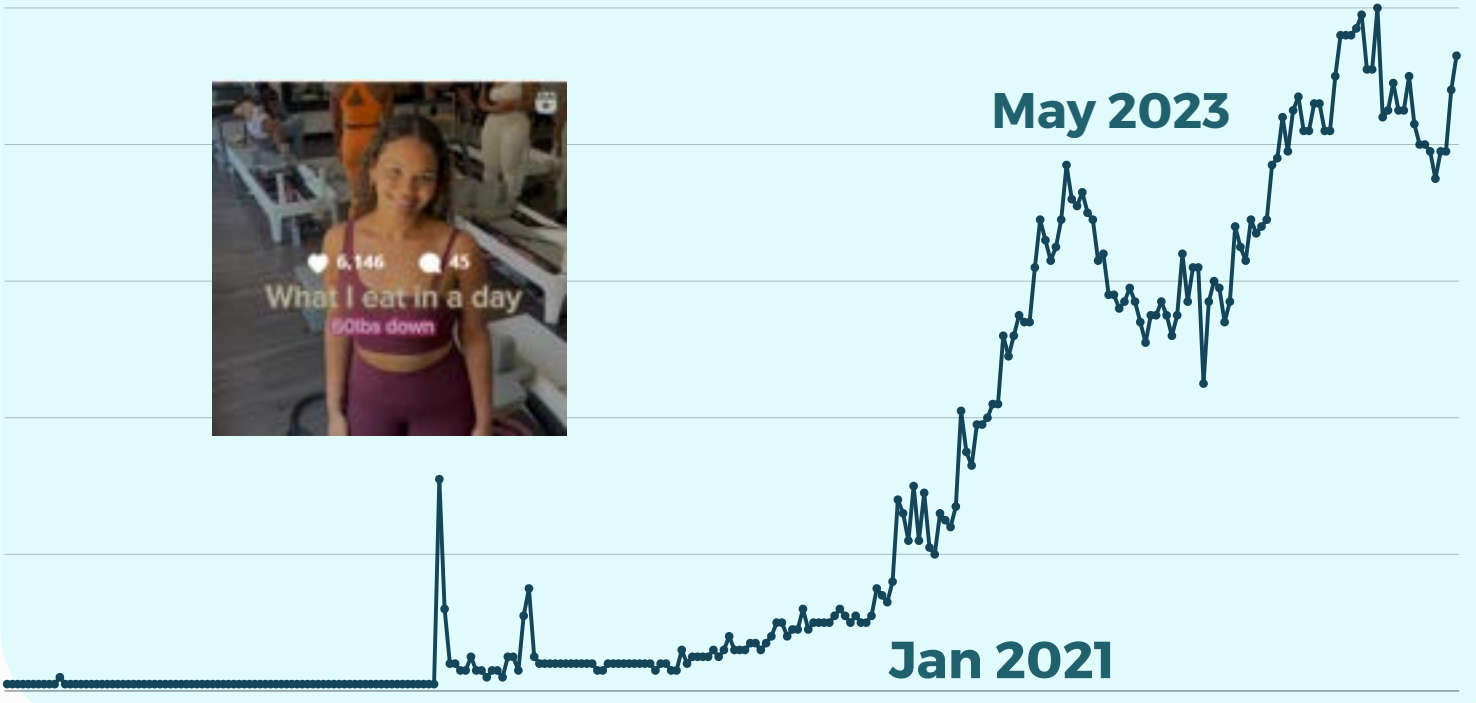
Beyond the Fad: Semaglutide Conversations Reheat with 500% Growth

Overall Social Posts by Product



Source: Brightfield Group; Wellness Social Listening; Oct 2024

Semaglutide Google Search Volume Overtime



What's trending?

Success stories

- Transformation Tuesday:** Users are sharing dramatic before-and-after photos, celebrating weight loss.
- Community Support:** Users offer tips on managing side effects and share their experiences of the success of healthier food choices

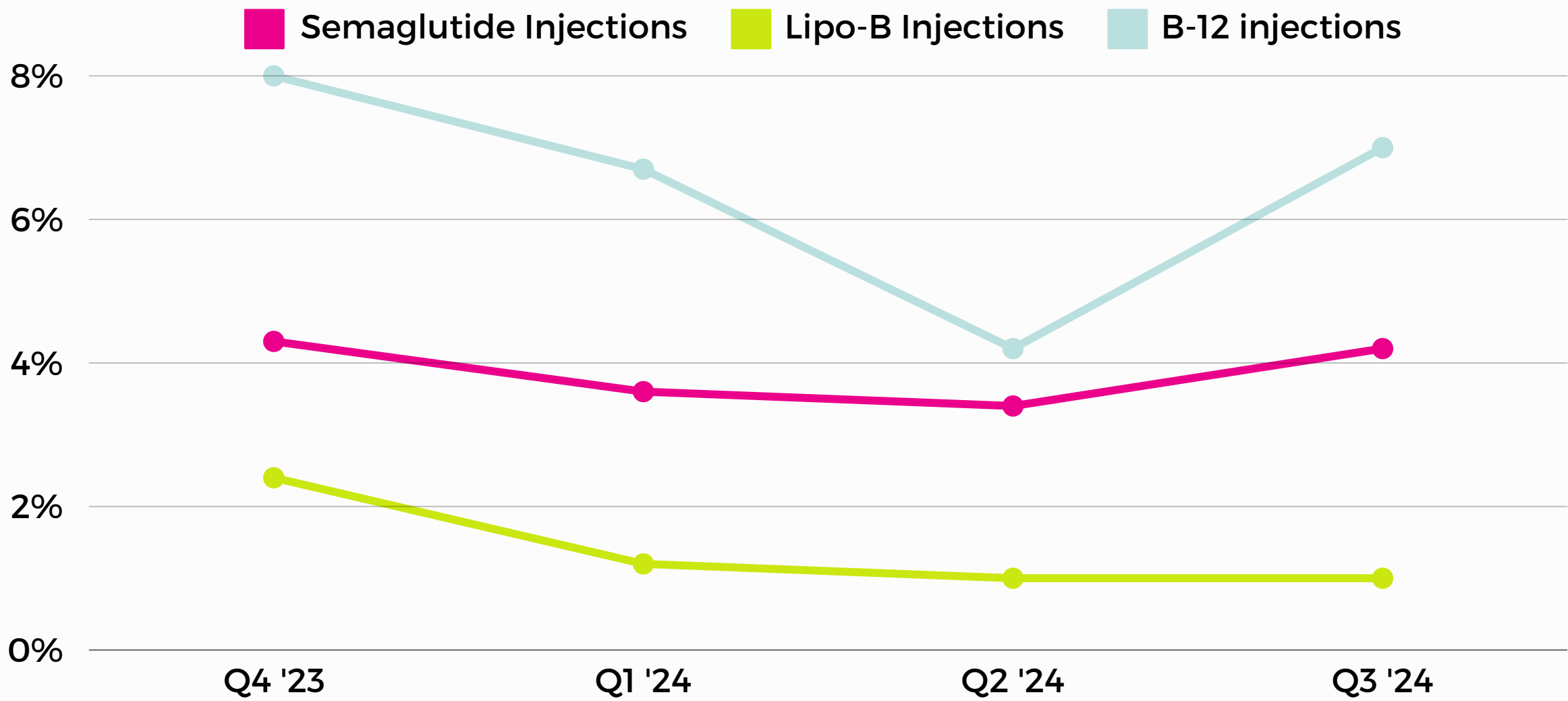
Cautionary Tales

- Fad Flashbacks:** Skepticism about long-term effectiveness and safety is growing.
- Not a Magic Potion:** Results are best with healthy habits, not as a solo solution.

4 million people reported using semaglutide in the P6M



Similar incidence as hydration powder





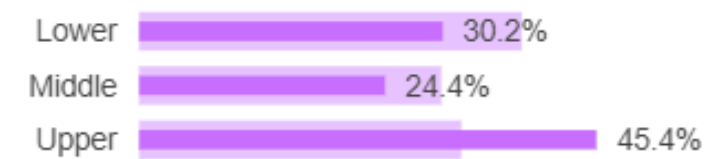
GLP-1s/ Semaglutide Injections

Who are semaglutide users? FROM THE PORTAL

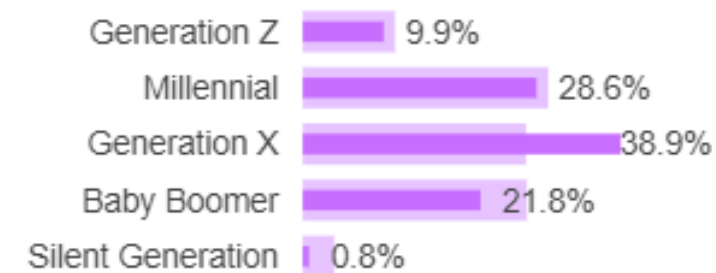
Gender



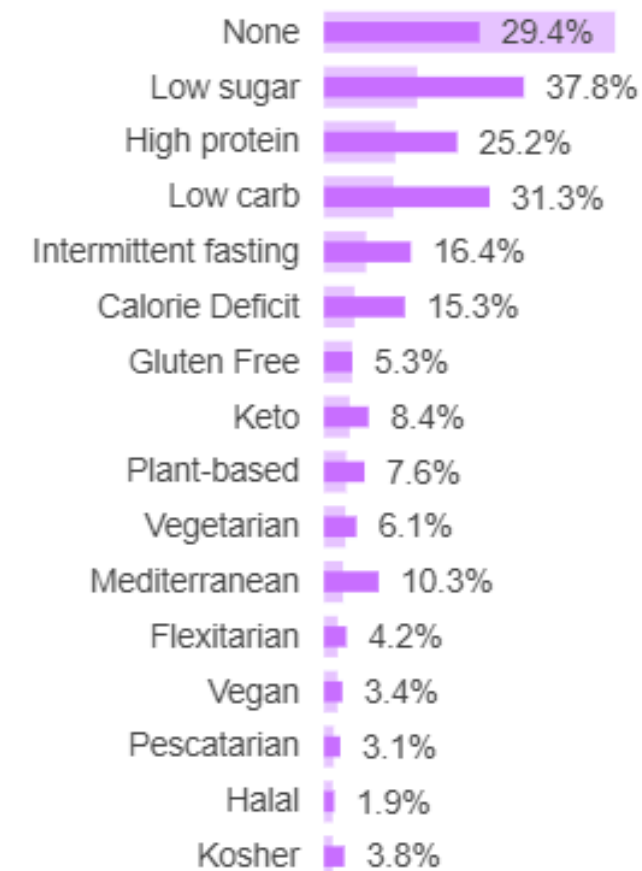
Income Level ⓘ



Generation ⓘ



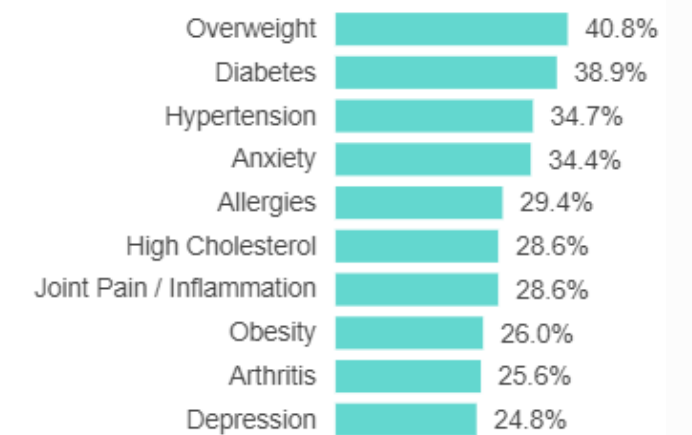
Diet



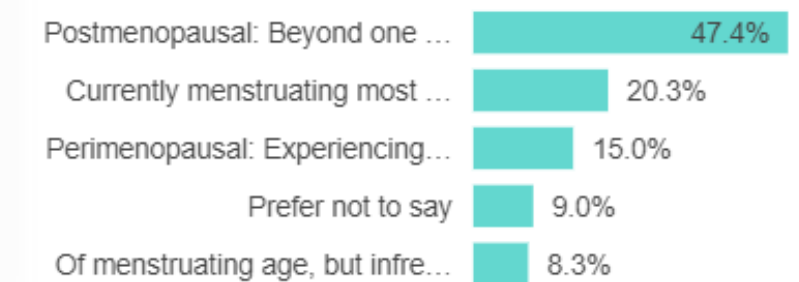
Wellness Persona



Conditions ⓘ



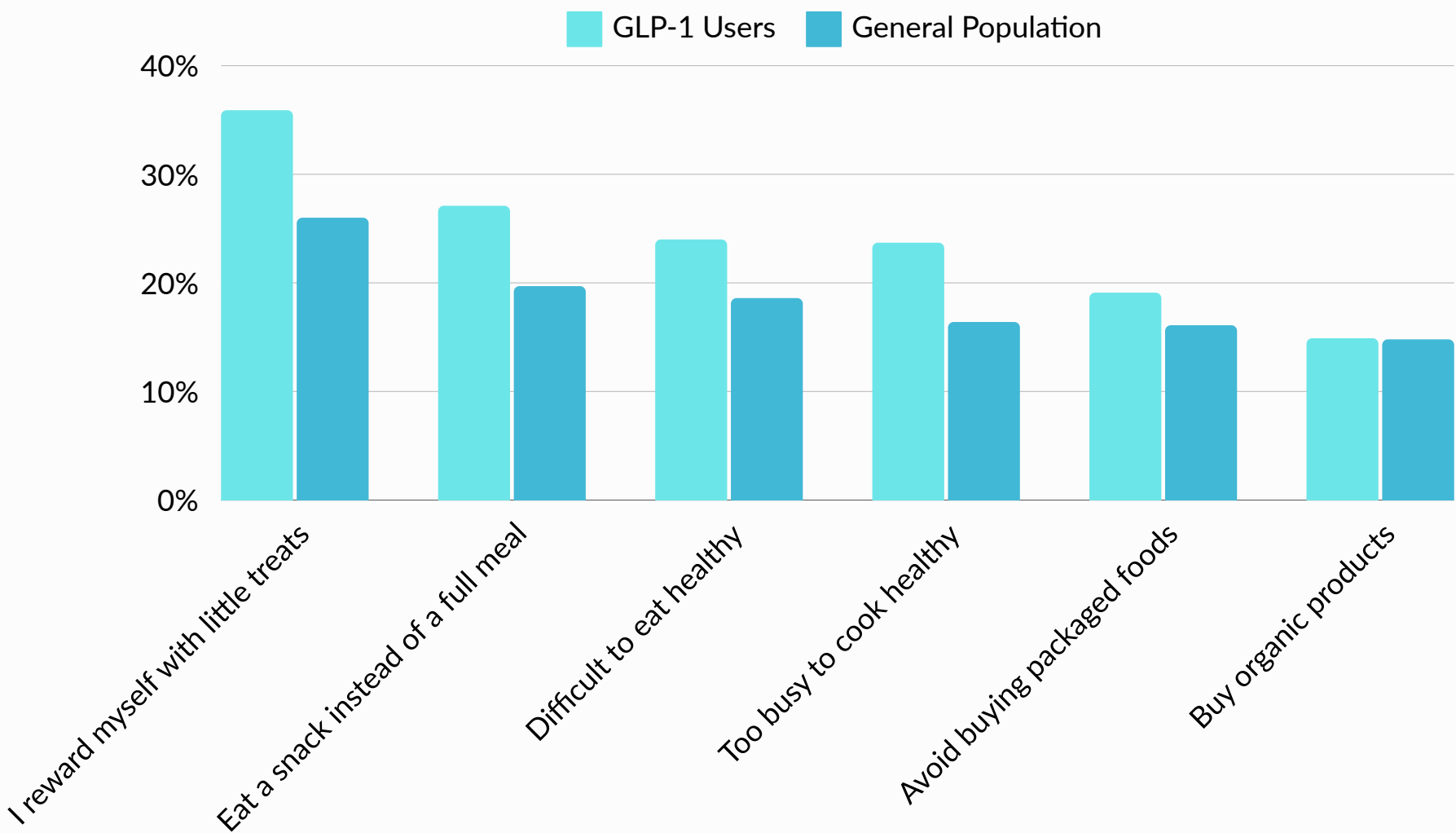
Menstrual Stage ⓘ



Trying to Lose Weight ⓘ



Nutrition Behaviors: GLP-1 Users vs. General Population



Key Differences: Ozempic Users vs. General Population

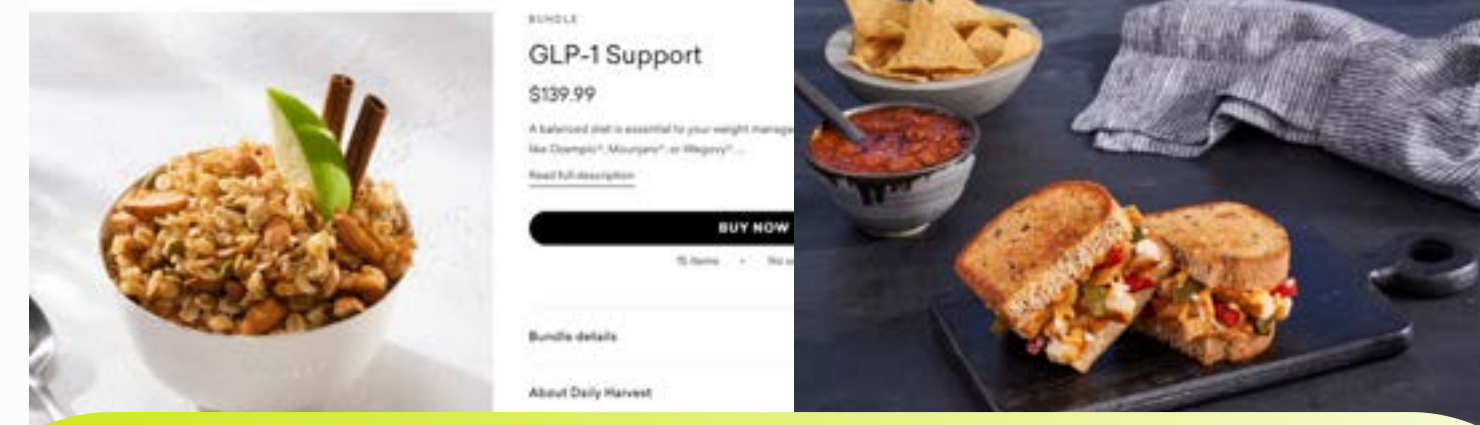
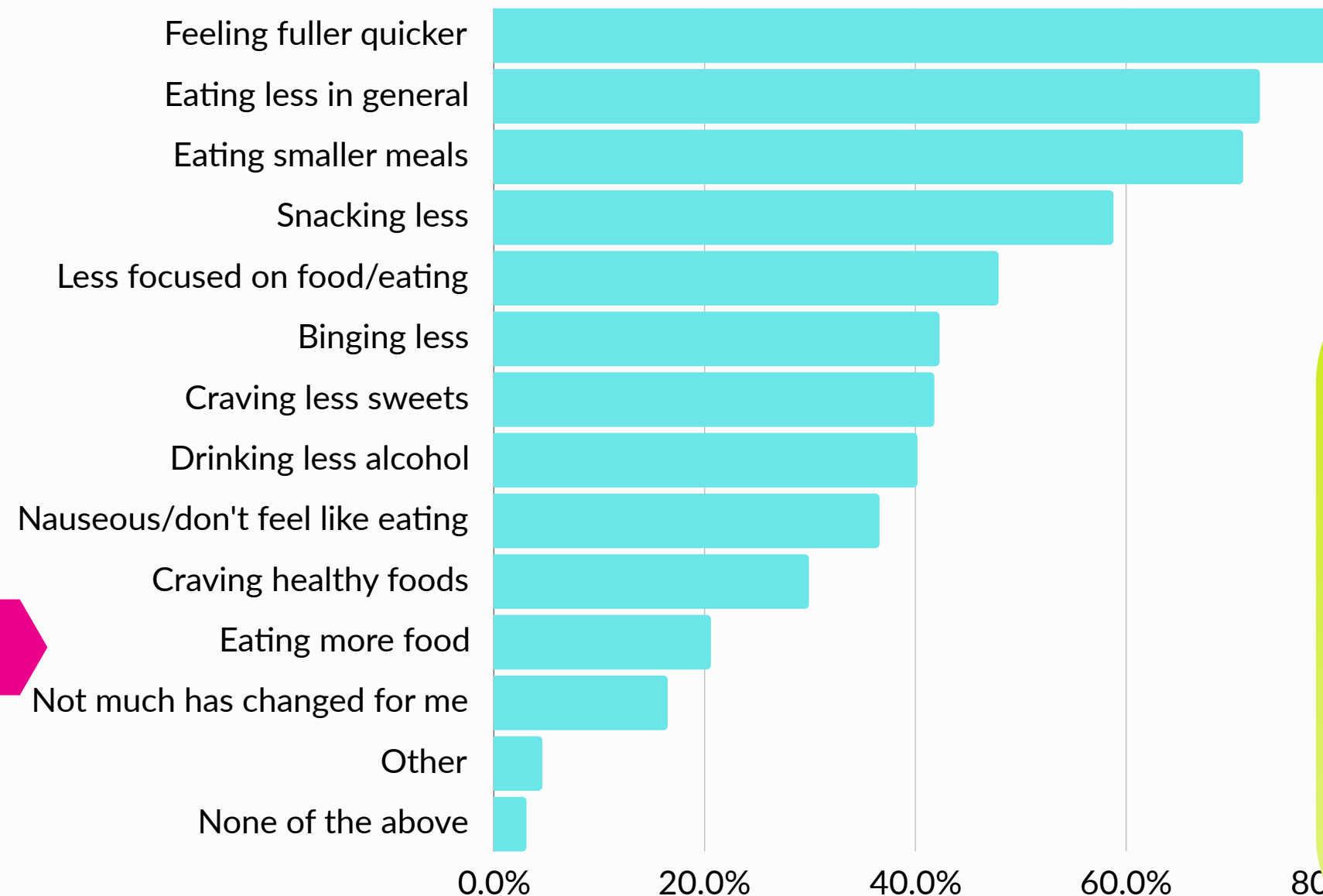
- **Treats:** Ozempic users (35.9%) indulge in small treats more often.
- **Meals:** They choose snacks over full meals more frequently.
- **Busy Schedules:** Ozempic users report being too busy to cook more often.
- **Healthy Choices:** Despite busy schedules, they avoid packaged foods more often.

Innovation Opportunity: This data highlights a potential need for convenient, healthy meal options for busy individuals on weight management medication.



Symptoms are spurring innovation

Semaglutide Symptoms



Industry Trends

- **Nestlé** is launching Vital Pursuit, a line of high-protein frozen meals designed for users of GLP-1 medications. These meals are portion-controlled and nutrient-enriched to support weight management goals. (Verywell Health) ([Nestlé Global](#)).
- **Mondelez** has positioned its snack bars as ideal for GLP-1 users ([The Independent](#)).
- **Daily Harvest** offers a collection of nutrient-dense, ready-to-eat meals aimed at weight control (Verywell Health).
- **Conagra** is exploring high-protein, low-calorie snack options like beef jerky and popcorn ([The Independent](#)).

GLP-1 Users are more likely to be consuming less alcohol and instead opting for functional beverages or other substances like THC and CBD

Attitudes toward Alcohol

	GLP-1 Users	Gen Pop
Consuming less alcohol	67.0%	59.0%
I like to explore and try new alcoholic beverages	63.3%	52.4%
I wish there were better non-alcoholic beverage options	52.5%	40.4%
There are plenty of non-alcoholic beverage options	62.4%	64.0%
Want more non-alcoholic alternatives	49.3%	36.6%

Source: Brightfield Group; Wellness Consumer Insights; Q3 2024

Over-Indexing Beverages for GLP-1 Users

- Yerba Mate 257
- Mushroom Coffee 213
- Nutrient-infused Coffee 210
- Matcha Tea 183
- Hot Matcha Tea or Latte Powder 169
- Turmeric Tea 164
- Green Coffee 154
- Oat Milk Latte 149
- Nitro / Cold Brew Coffee 148
- Iced Coffee Drink 122
- Coffee Shots 121



The hunt to mimic the Ozempic effect with other products



WELLNESS Nature's Ozempic: A Look Into the Supplement Berberine

BY AMY SYNNOTT AND MARGAUX ANBOUBA
April 12, 2024



Supergut

<https://www.supergut.com/blog/why-prebiotic-fiber...>

Why Prebiotic Fiber Is Nature's Ozempic

Sep 5, 2023 — They serve as an energy source for the cells lining the colon. · They have an anti-inflammatory effect that helps maintain a healthy gut barrier.

healthline

Health Conditions

Discover

Plan

Connect

NUTRITION

Meal Kits

Special Diets

Healthy Eating

Food Freedom

Conditions

Feel Good Food

What Foods Increase GLP-1 Levels?

[Foods to increase GLP-1](#) | [How it works](#) | [Summary](#)

Foods high in protein, fiber, and healthy fats can trigger the release of GLP-1, an important hormone that helps regulate blood sugar levels and promotes a feeling of fullness.

Glucagon-like peptide-1 (GLP-1) is a hormone that plays a key role in blood sugar regulation. It does this by stimulating the release of insulin and reducing the release of glucagon, a hormone that raises blood sugar.



In a study among mice fed a high-fat diet, Beta-glucan was found to control blood sugar and assist in weight loss. Beta-glucan is in oats and barley.

sciencealert

One Type of Fiber May Have Weight Loss Benefits Similar to Ozempic

HEALTH 25 October 2024 By CARLY CASSELLA



FIBER... THE NEW OZEMPIC AFFECT?



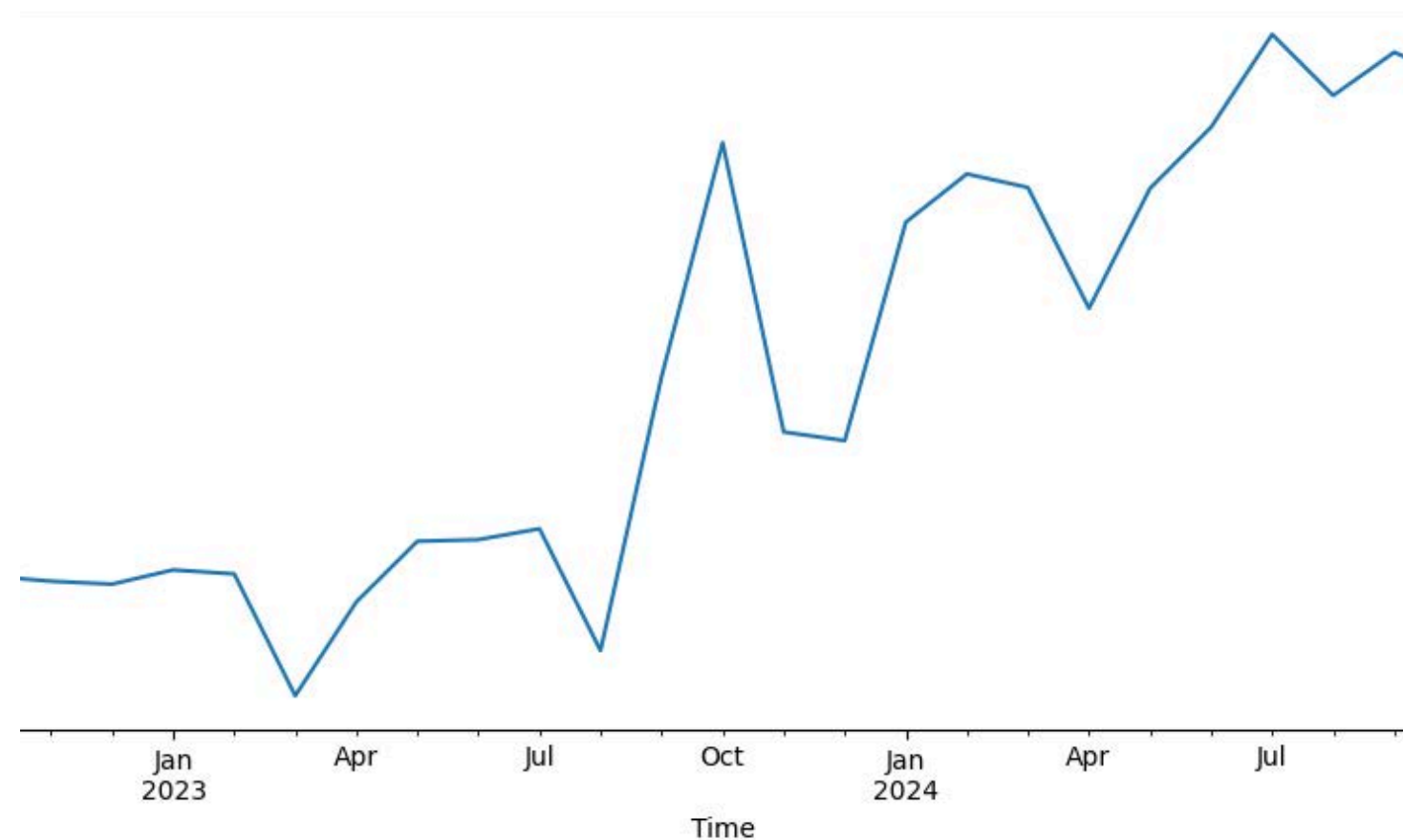
A 2021 study from American Society for Nutrition, found only 7 percent of Americans get enough fiber, a problem nutritionists call the “fiber gap.”



A fiber-heavy diet is associated with reduced risk of heart disease, stroke, high cholesterol, hypertension, certain cancers, and can also improve your gut health.

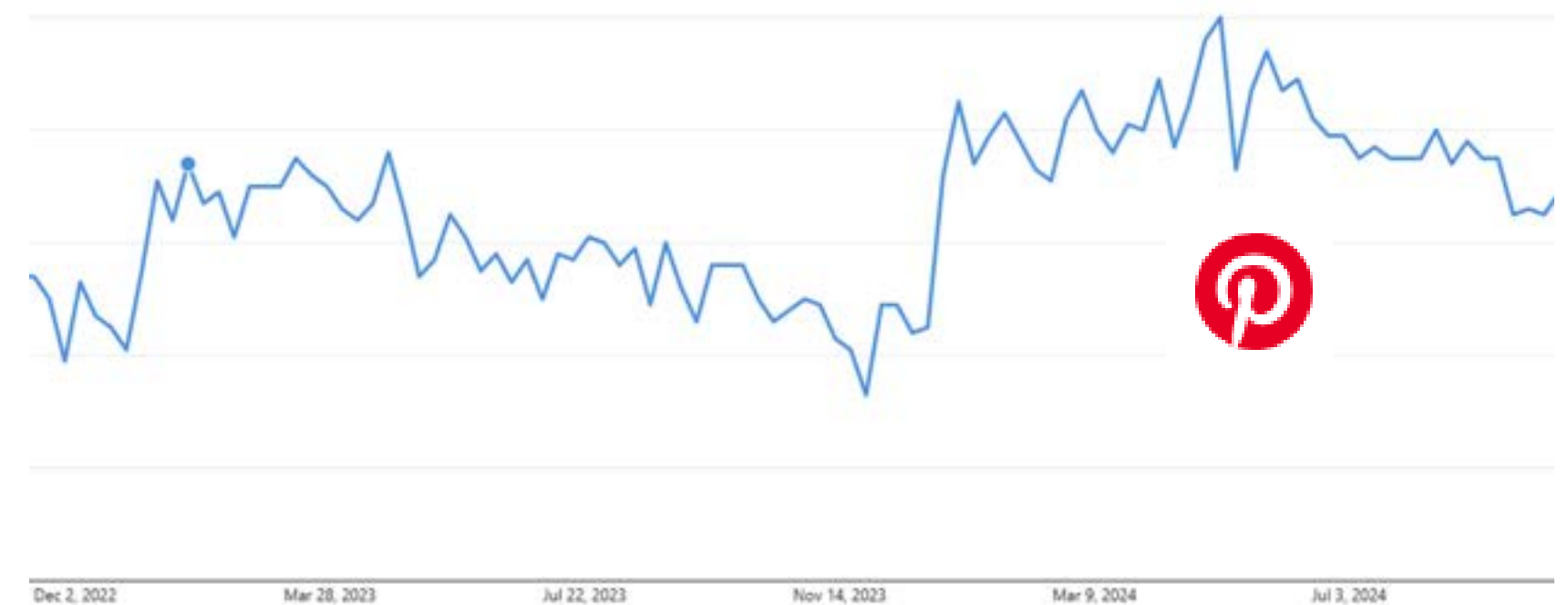
Conversations and Searches for Fiber are on the Rise

Social Listening Conversations Containing Fiber



Source: Brightfield Group; Wellness Social Listening; Oct 2024

Searches for Fiber on Pinterest



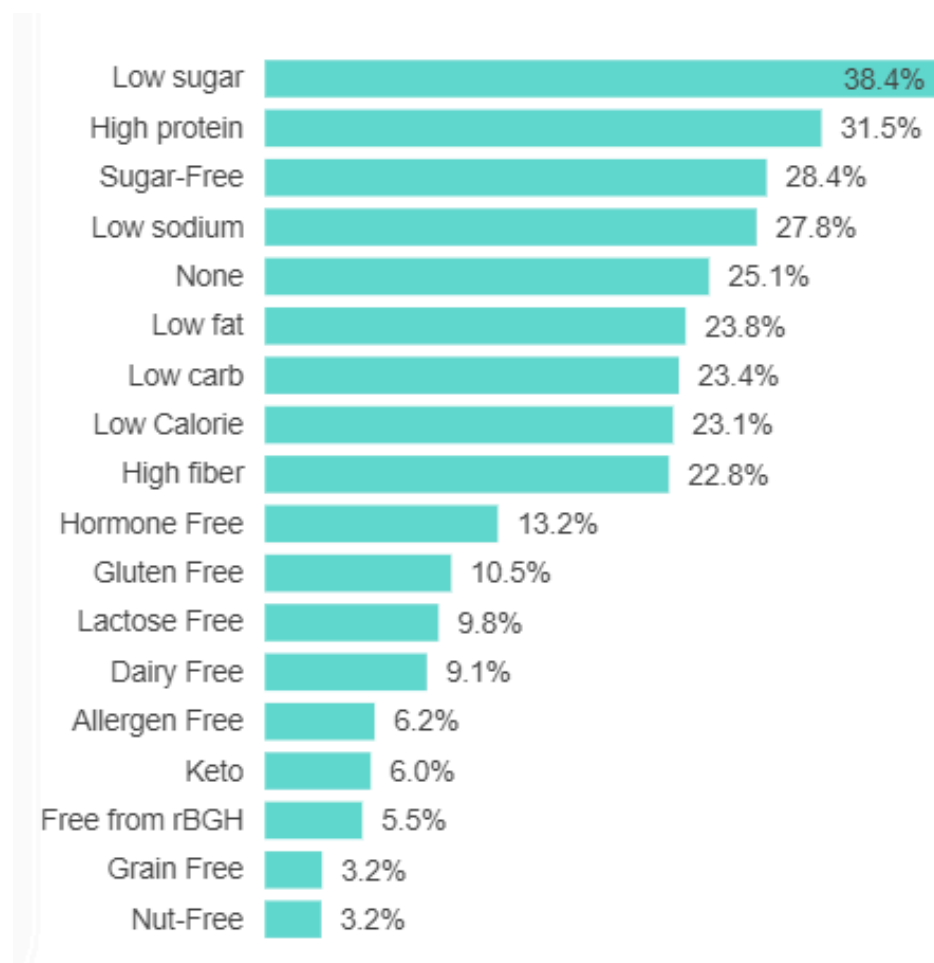
Fiber... the new Protein? Conversations about the claim “High Fiber” are showing growth similar to “high protein” conversations in Q1 2024 which have started to flatten.

Fiber is showing a similar trajectory to “High protein” conversations which peaked in Q1 2024

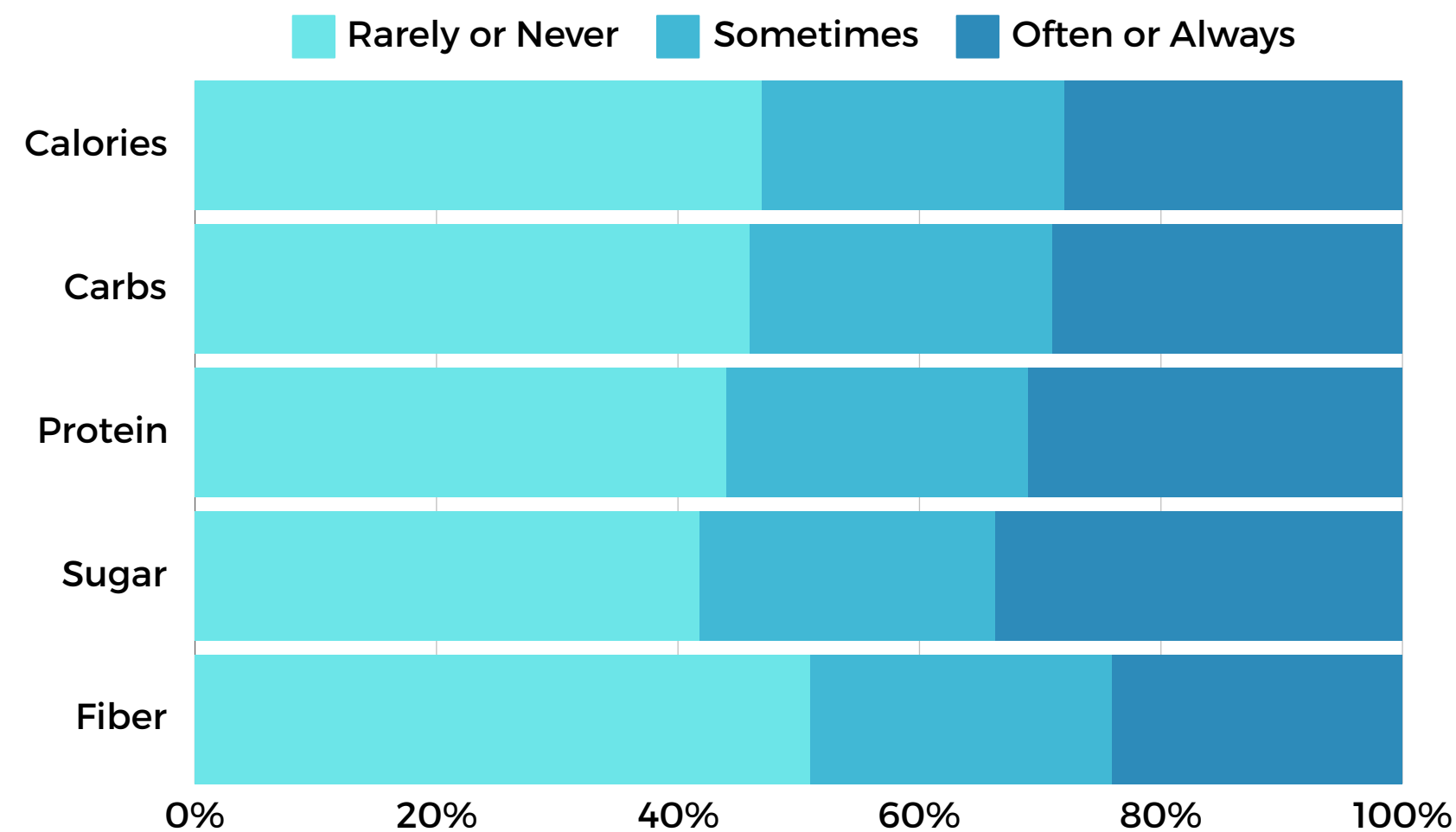


About a quarter of consumers are focused on high fiber

Important Label Claim



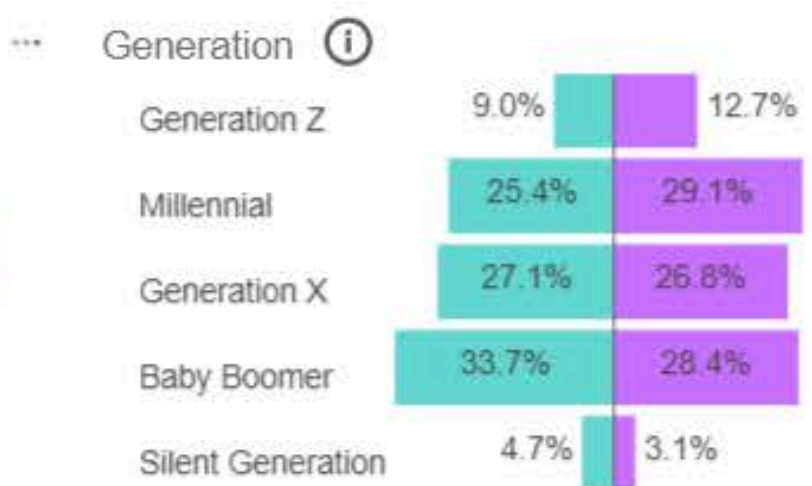
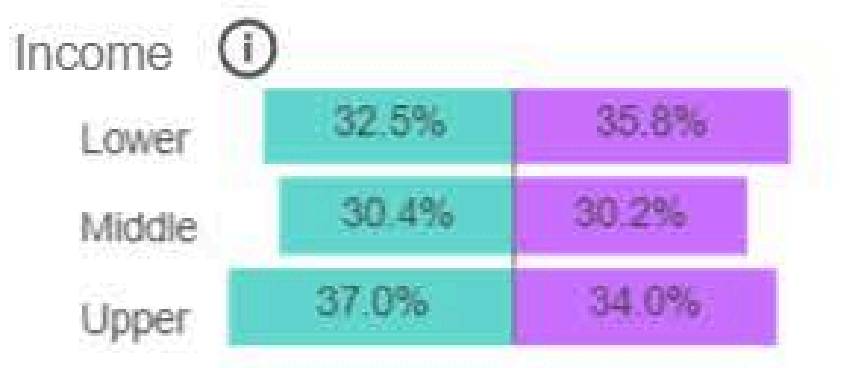
Track Daily Consumption



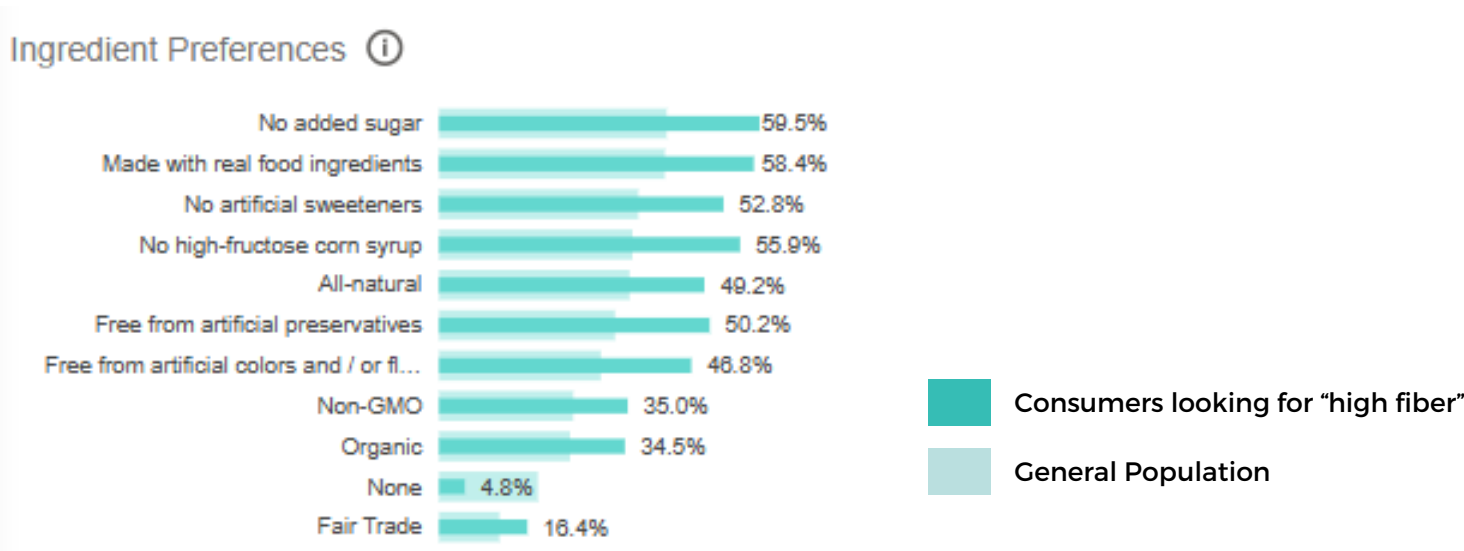
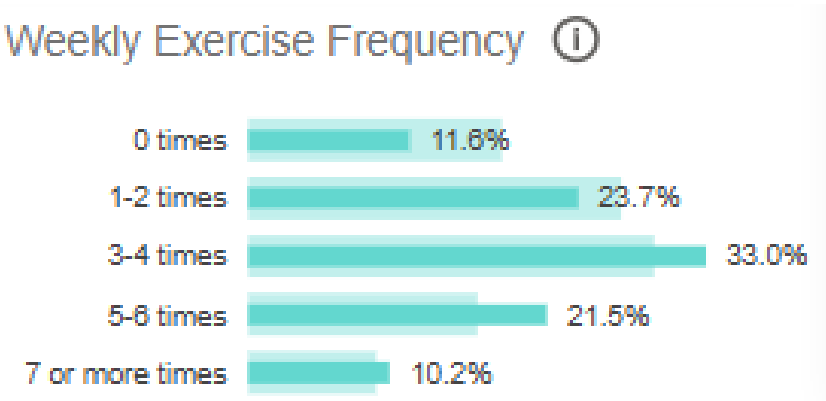
Source: Brightfield Group; Wellness Consumer Insights; Q3 2024



Traditionally, those looking for high fiber claims fall into the “Better Way Believers” segment. These consumers are more active than the gen pop, tend to over-index with other nutritional claims and over-index in purchase of ingredients with digestive benefits.



Consumers looking for “high fiber”
General Population



Consumers looking for “high fiber”
General Population

High Fiber Conversations in social listening mostly include probiotics/prebiotics but are increasingly talking about jackfruit and fish oil

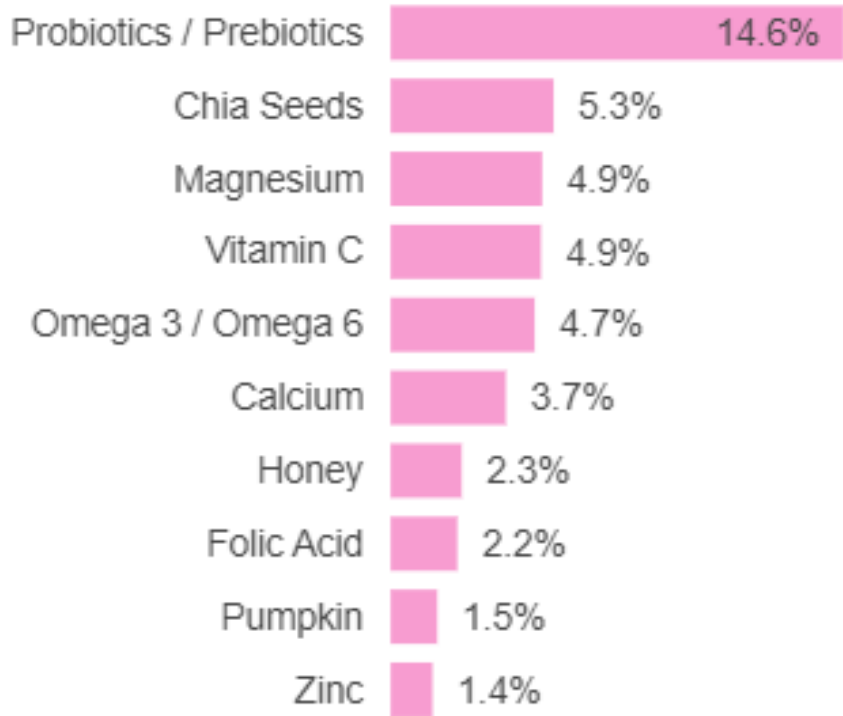
Summary

High Fiber

Social media users emphasize the benefits of high-fiber diets, particularly in promoting satiety, gut health, and hormonal balance. High-fiber foods like fruits, vegetables, legumes, and whole grains are frequently recommended for their role in regulating blood sugar, supporting digestion, and enhancing skin health. Users also discuss the gut-brain connection, highlighting how fiber-rich diets can positively impact mood and mental well-being. For actionable tips, users suggest gradually increasing fiber intake, staying hydrated, and incorporating diverse fiber-rich foods into meals.

Ingredients ⓘ

- Most Popular
- Top Indices
- Top Trending

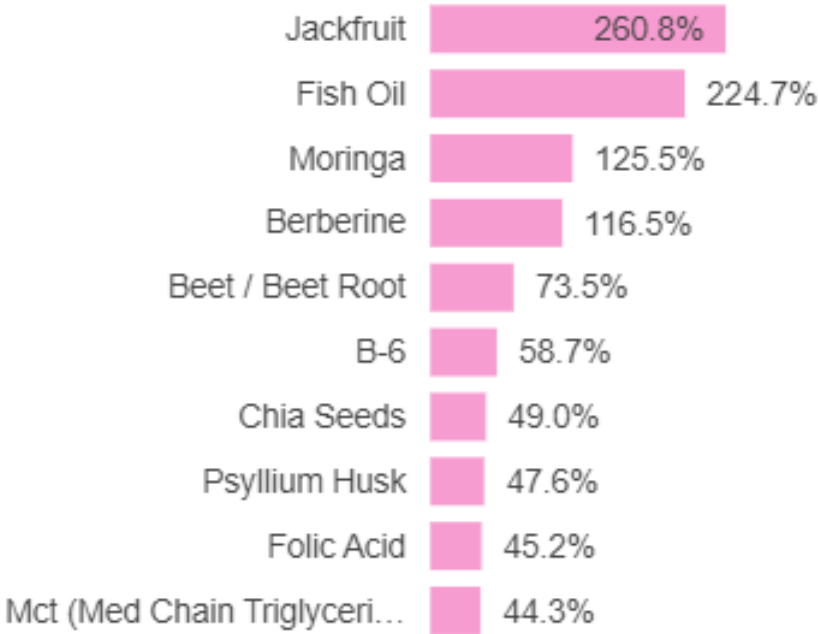


Interpreting Social Listening:

Most Popular Mentions reveal that conversations about Fiber also coincide with established functional ingredients like Prebiotics/Probiotics, Chia seeds and Magnesium.

Ingredients ⓘ

- Most Popular
- Top Indices
- Top Trending
- ...



Top Trending Ingredients reveal potential future opportunities tying High Fiber to products containing other ingredients typically tied to digestive health benefits.

Connecting fiber to GLP-1s



Understanding Prebiotics and Fiber



Both prebiotics and fiber are dietary tools to promote health

What is a prebiotic?

In simple terms, a prebiotic is food for beneficial members of your resident microbial community – we can't digest prebiotics, but certain beneficial microbes can. Your resident microbes can produce a variety of beneficial compounds (for example, short chain fatty acids) from utilization of prebiotics. These can promote a healthy gut – and beyond. In more technical terms, a prebiotic is a substance that is selectively utilized by host microorganisms conferring a health benefit.

What is fiber?

Fibers are non-digestible plant-derived carbohydrates comprising at least 3 units of individual sugars. Most fibers are components of plants. Depending on regulations where you live, if fiber is isolated from whole plants or synthesized from sugars, demonstration of physiological benefits is needed to be able to call them 'fiber' on a food label.

Do we need both fiber and prebiotics?

Most of us do not get enough fiber in our diets. Increasing fiber-rich foods and prebiotic-containing foods or supplements will help promote gut health and benefit your gut microbiota, too.



Some fibers, for example, form a gel-like substance that slows the movement of food through the digestive tract and that can reduce blood sugar spikes and lower cholesterol. Other fibers can feed our gut microbes, contributing to a healthy gut microbiome; and still others can add bulk to digestive material and prevent constipation.

<https://www.nytimes.com/newsgraphics/card-story/fiber-diet>

Dietary fibers are the main source of energy for bacteria living in our guts, and yet less than 5 percent of people in the US consume the recommended 25–30 grams (0.9–1 ounce) of fiber a day.

"Part of the benefits of consuming dietary fiber is through the release of GLP-1 and other gut peptides that regulate appetite and body weight," said Duca.

Science Alert Oct 25 2024

Future Trend to Watch: Conversations about resistant starch are starting to pick up



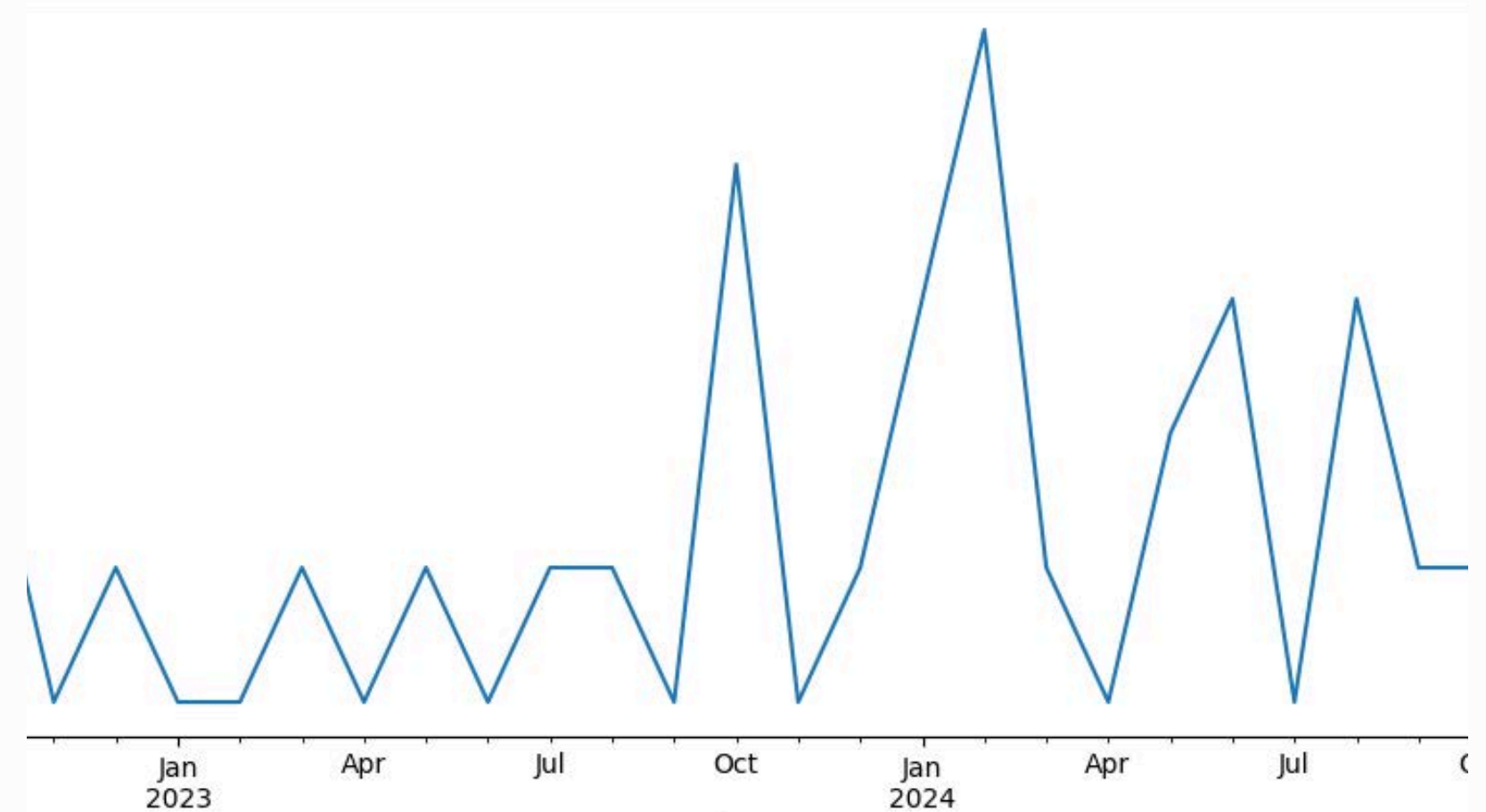
drmarkhyman
Mark Hyman, M.D. - 2022-7-5



Refrigerated rice and my blood sugar. Does coolin...



Social Conversations Since Jan 2023



Although still niche, Resistant Starch conversations are highlighting continued interest in the mind/gut connection. Additionally, these posts highlight how food preparation of carbohydrate rich foods (e.g. letting rice/potatoes/pasta refrigerate overnight) can change the food's nutritional properties and impact blood sugar/glycemic index or digestion.

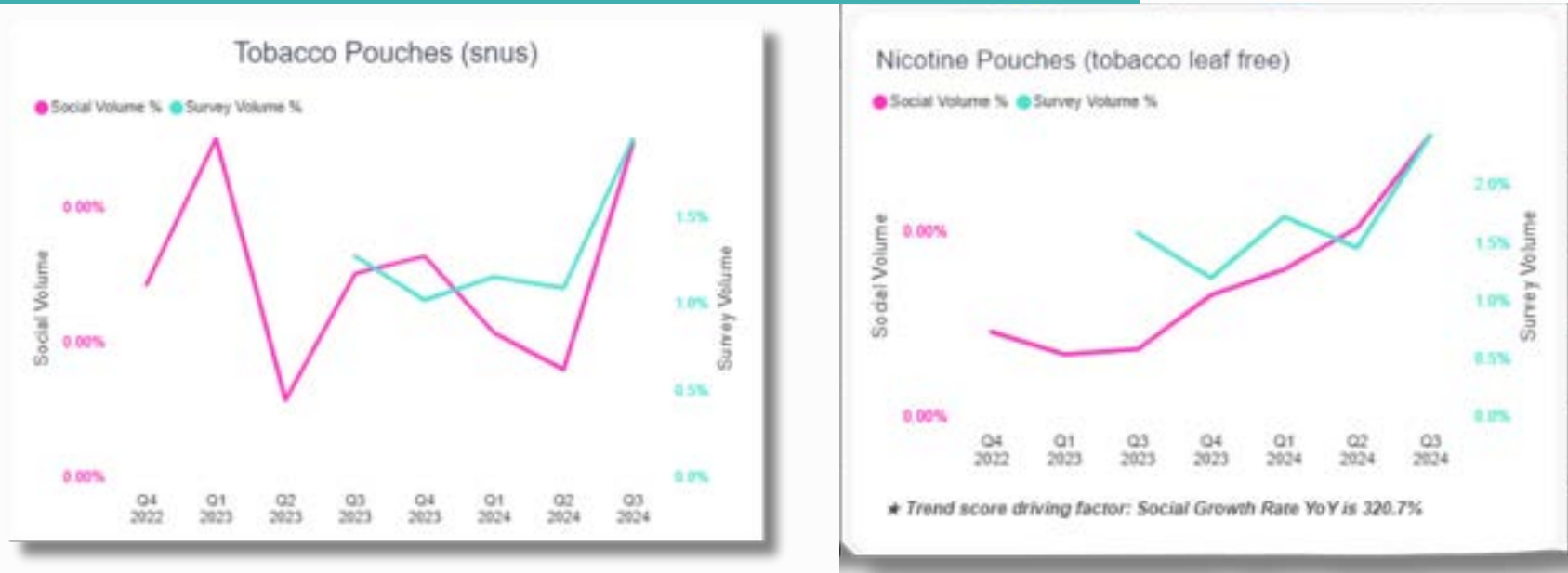
Sneak Peak: Other 4-Star Trends



Snacking/Food: Protein Versions of Traditional Breakfast



Substances: Smokeless Nicotine



Beverage: Variations of Tea



Beverage: Low-Alc & Non-Alc

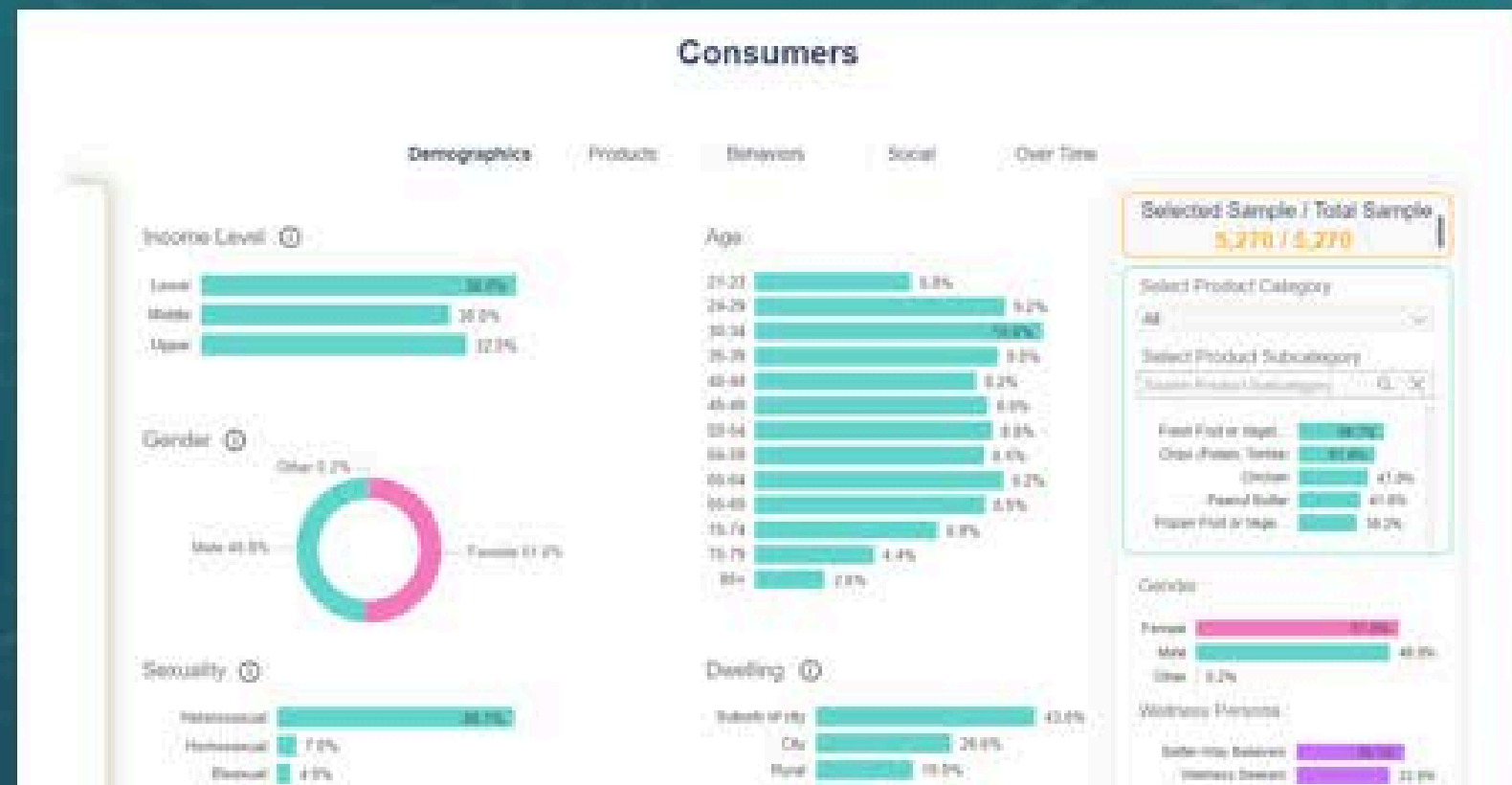


DISCOVER MORE TRENDS IN THE SNAPSHOTS PORTAL!

Get into the data in the Brightfield Portal!

Explore Consumer Insights 

Explore Social Listening 





[Click here to see our past trend reports!](#)

