



2025

PROTEIN + FIBER = A PERFECT MATCH

Based on Q4 2024 Data

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

Methodology Overview

 BRIGHTFIELD GROUP Built by insights people for insights people!

SURVEY DATA

Over 40,000 consumers surveyed



Questionnaire fielded quarterly since Q3 2021 with dynamic edits to account for the latest trends over time



Quotas & weighting were used to achieve a nationally representative sample, including age, gender, income, & region



Wellness-oriented questions that reveal attitudes, behaviors, & purchasing of over 150 products

+

SOCIAL LISTENING



Over 10 million conversations collected since 2021

Posts pulled based on wellness-focused hashtags & topics

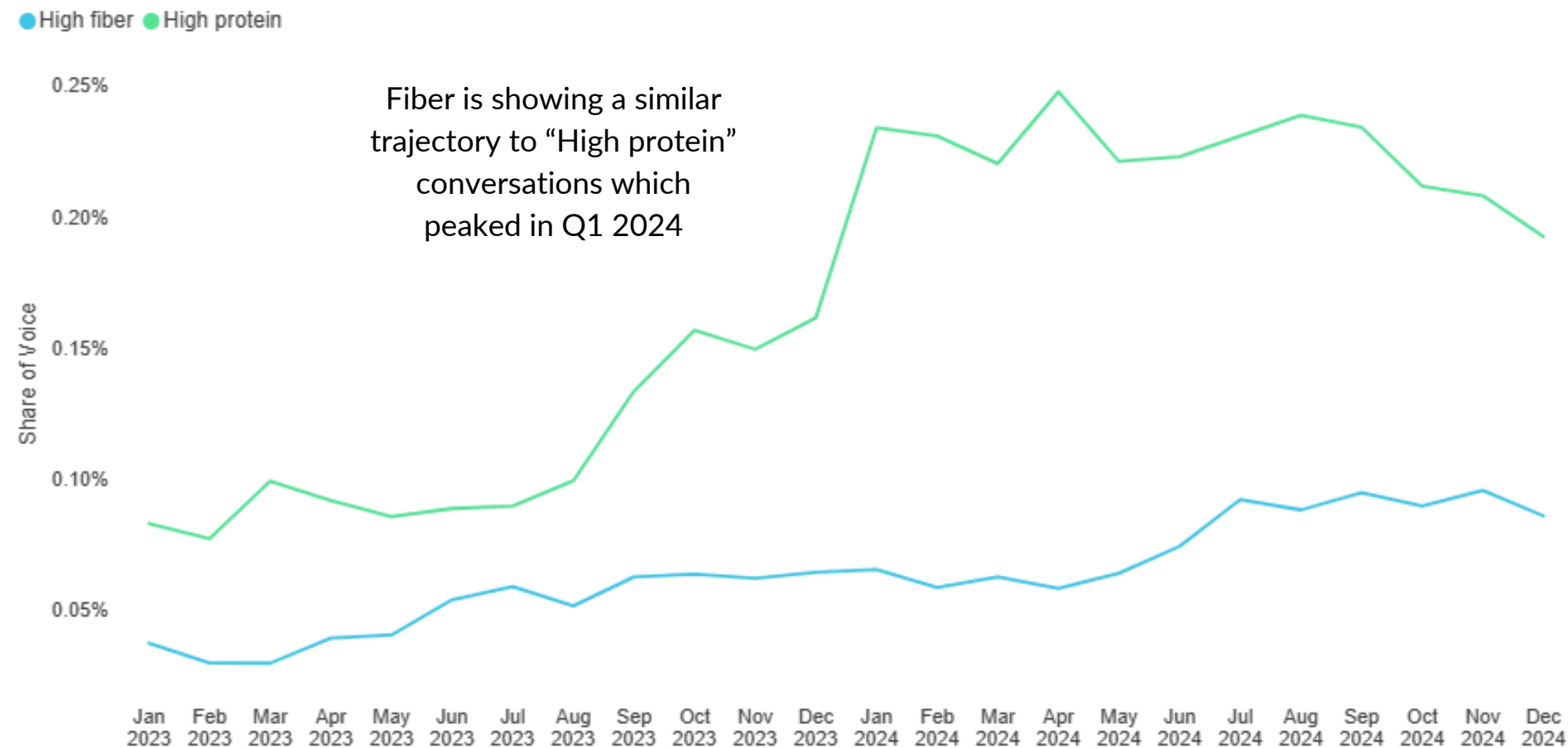
Posts tagged by Need State, Product, Ingredient, Flavor, & Condition using AI-enabled machine-learning & natural language processing

Neural network training to help AI predict gender, age, and persona



Protein + Fiber: The New “It” Couple

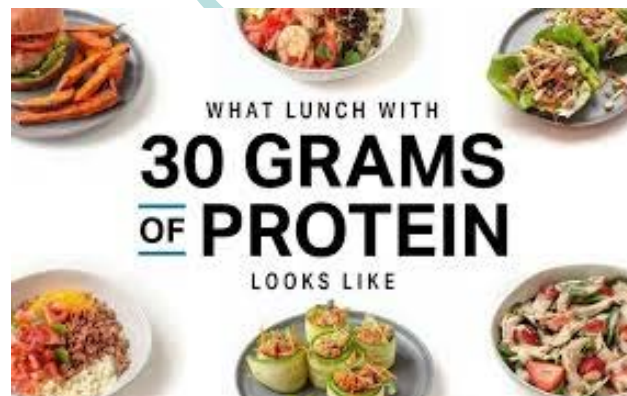
High Fiber and High Protein Conversations Over Time



Fiber + Protein - Social Conversations

Protein has been a hot topic in social since 2023 and Fiber is showing similar growth in conversations. Noticeably, about 30% of conversations about High Fiber also mentioned Protein. Common themes in these discussions include:

- **Digestion:** The combination of fiber and protein is often linked to digestive health.
- **Energy:** Many posts highlight fiber and protein as key components for sustained energy.
- **Meal & Snack Ideas:** Discussions frequently focus on meal replacements and high-protein, high-fiber snacks.
- **Overall Nutrition:** Fiber and protein together are presented as essential for balanced diets.
- **Muscle Health:** Protein is emphasized for muscle building, while fiber is linked to gut health.
- **Weight Management & Satiety:** Posts commonly mention fiber and protein as effective in promoting fullness and supporting weight control. Incorporating both is particularly important for those on GLP-1s which accounted for 13M Americans in Q4 2024.



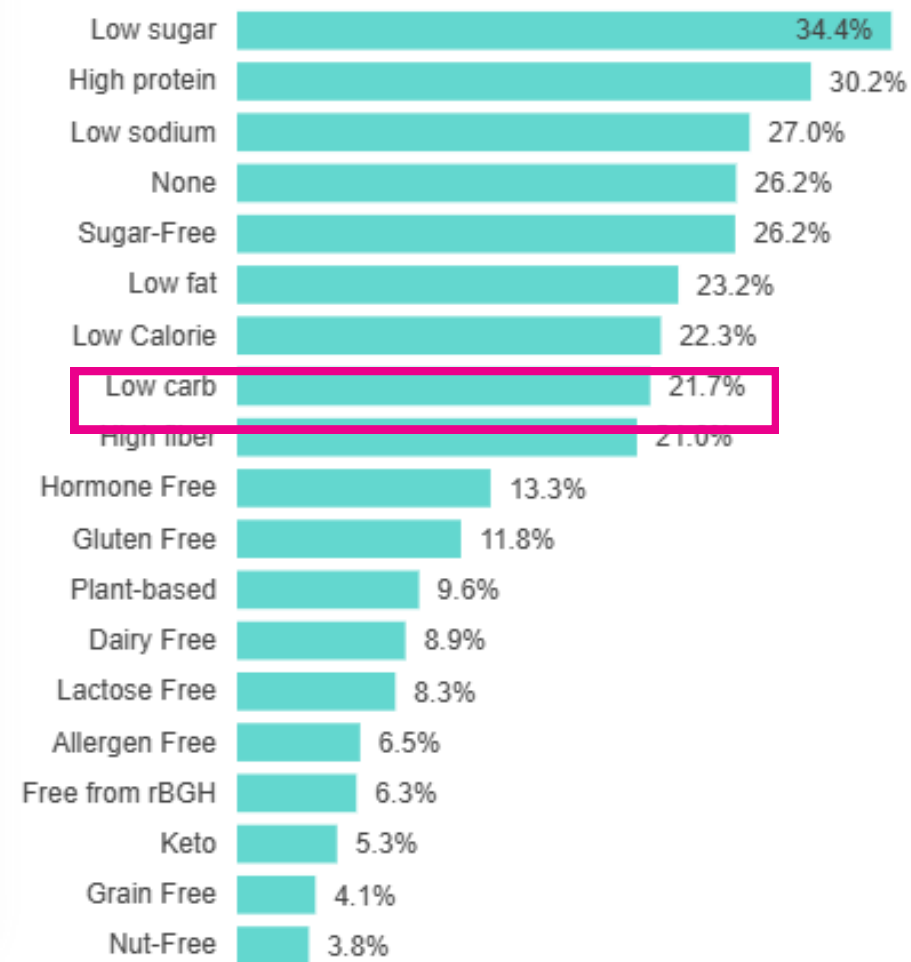
“30g Protein” Trend evolves into “30-30-3”
Protein conversations highlighted the “30g” starting in 2023, and recently this trend has evolved into the “30-30-3” trend—incorporating 30g of fiber & 3 probiotic-rich foods as the 2nd and 3rd component



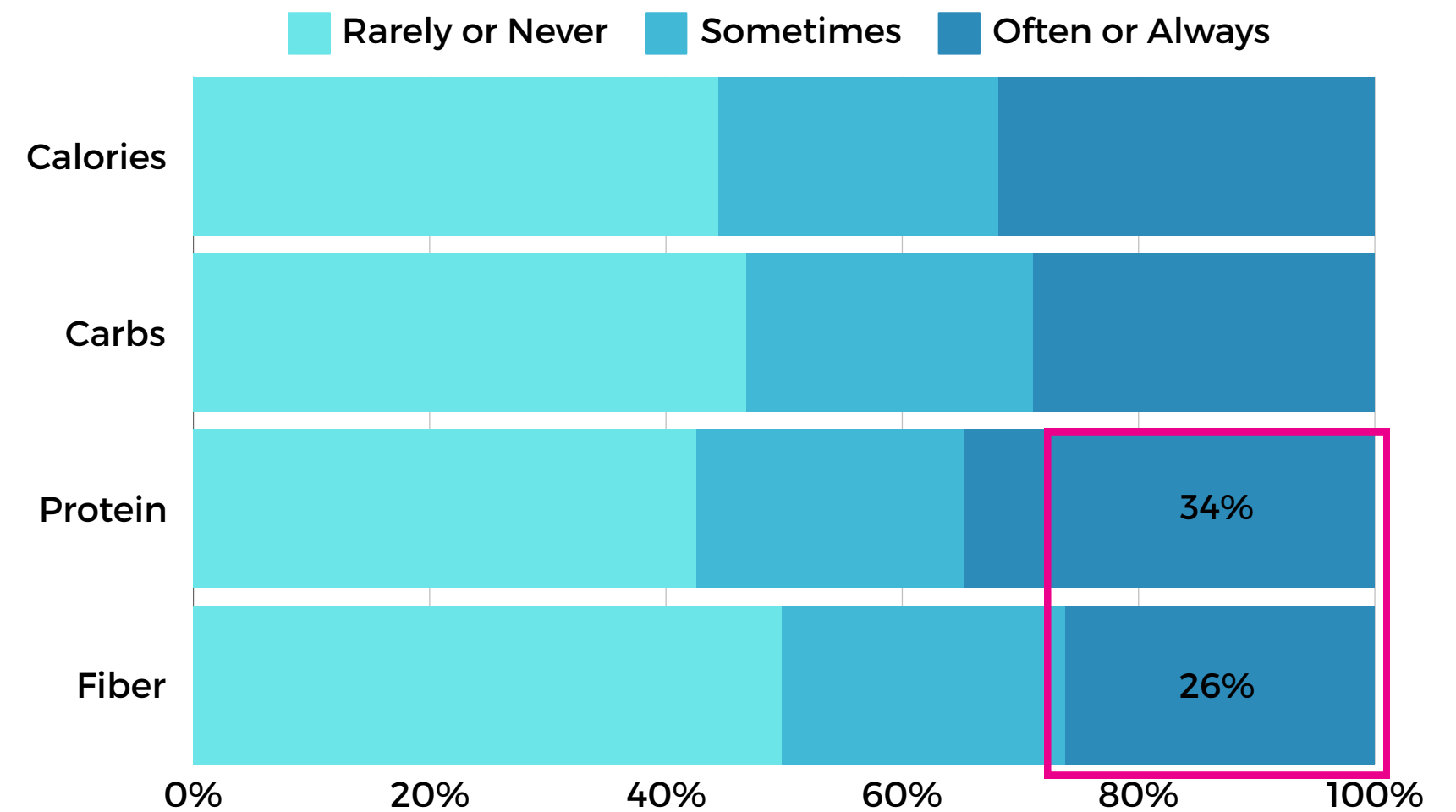
In Q4 2024 about a fifth of consumers were focused on high fiber and almost one third on high protein

Important Label Claim

Important Label Claims ⓘ



Track Daily Consumption



Source: Brightfield Group; Wellness Consumer Insights; Q4 2024



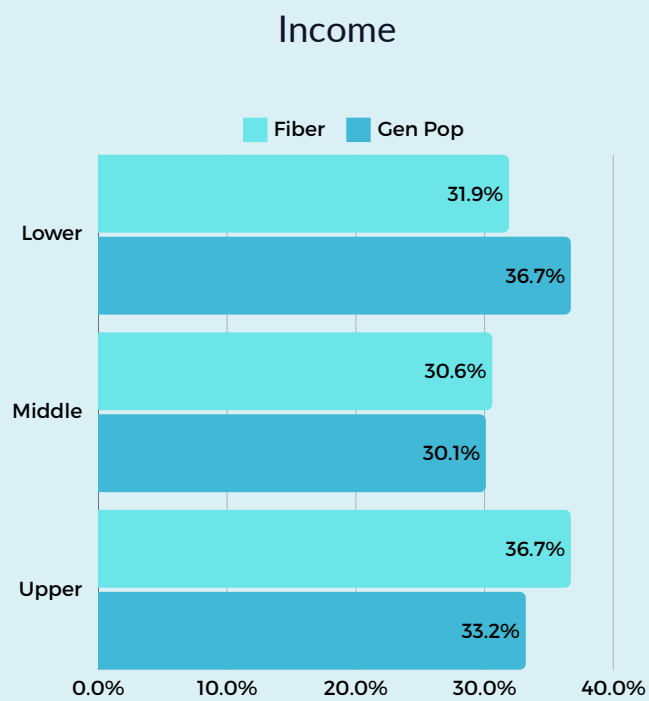


Key Segments: Who are the Fiber and Protein Consumers?

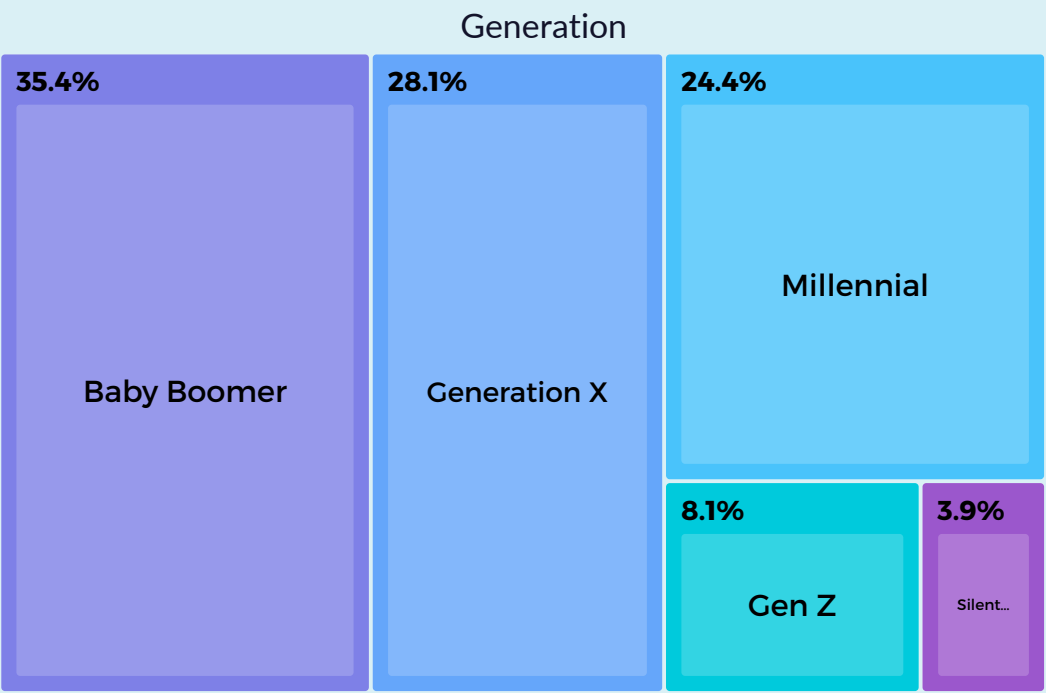
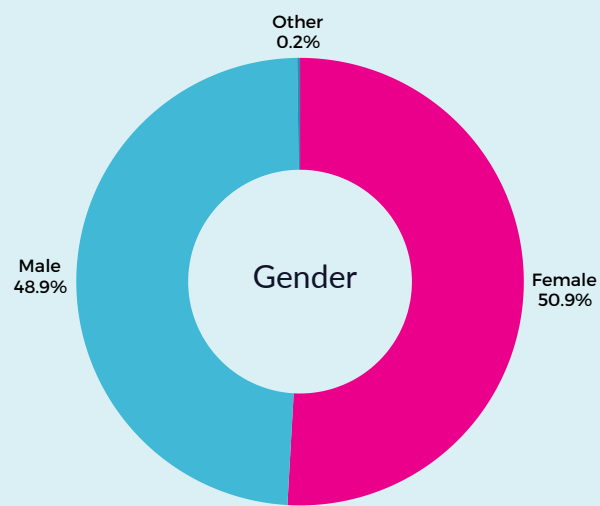
Key Segment: Better Way Believers

Both groups over-index as “Better-Way Believers” segment. Better-Way-Believers are moderately health conscious yet highly practical. This tends to be one of the largest segments, but they are cautious and do not embrace new trends hastily. They prefer to observe from the sidelines to assess what truly works before getting on board. Introducing innovations within product categories they already know can generate significant volume, leveraging their familiarity and reducing the need to overcome their comfort levels.

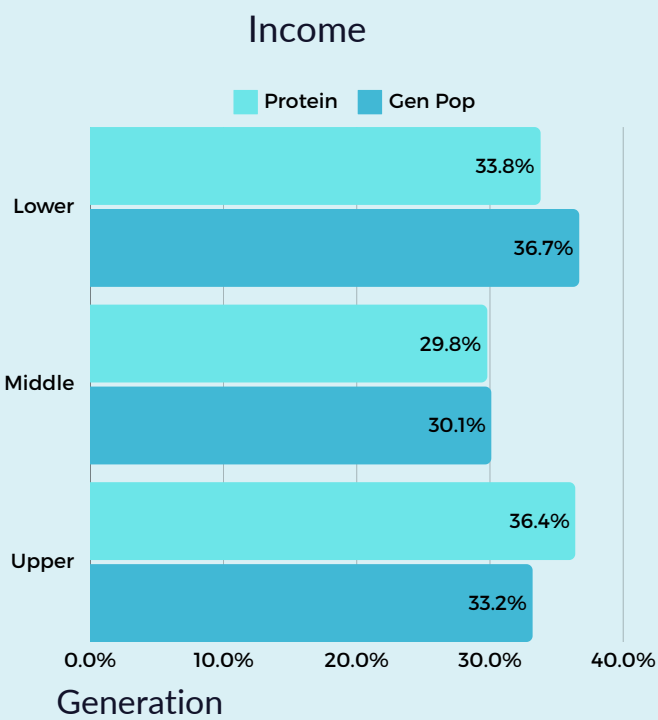
High Fiber Consumers



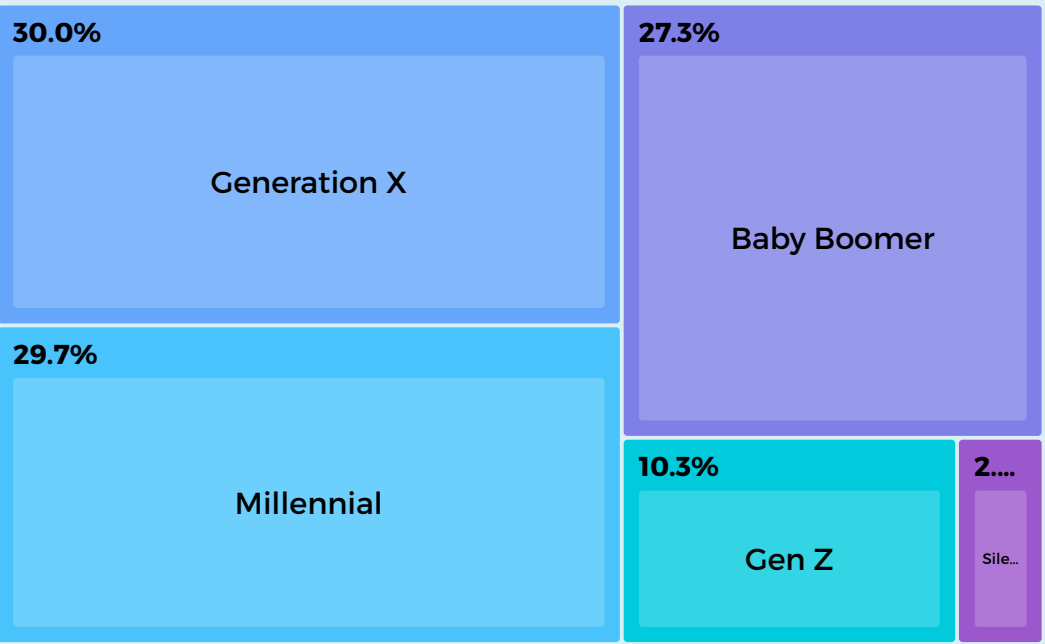
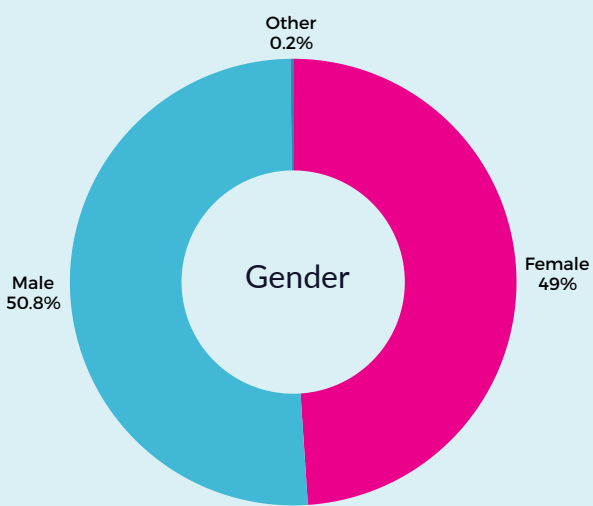
Consumers who look for claims related to “high fiber” skew Baby Boomer, Upper Income, and are relatively split from a gender perspective.



High Protein Consumers



Consumers who look for claims related to “high protein” skew more Gen X & Millennial, also tend to be Upper Income and not over-indexing for any particular gender.



Takeaways: Key Messages for Innovating in Fiber + Protein

Gut Health & Digestion: The Fiber-Protein Connection

Showcase how fiber supports digestion, while protein aids in muscle recovery and metabolism.



Women's Health & Healthy Aging Benefits

Emphasize additional benefits of fiber + protein for women's health, or healthy aging.



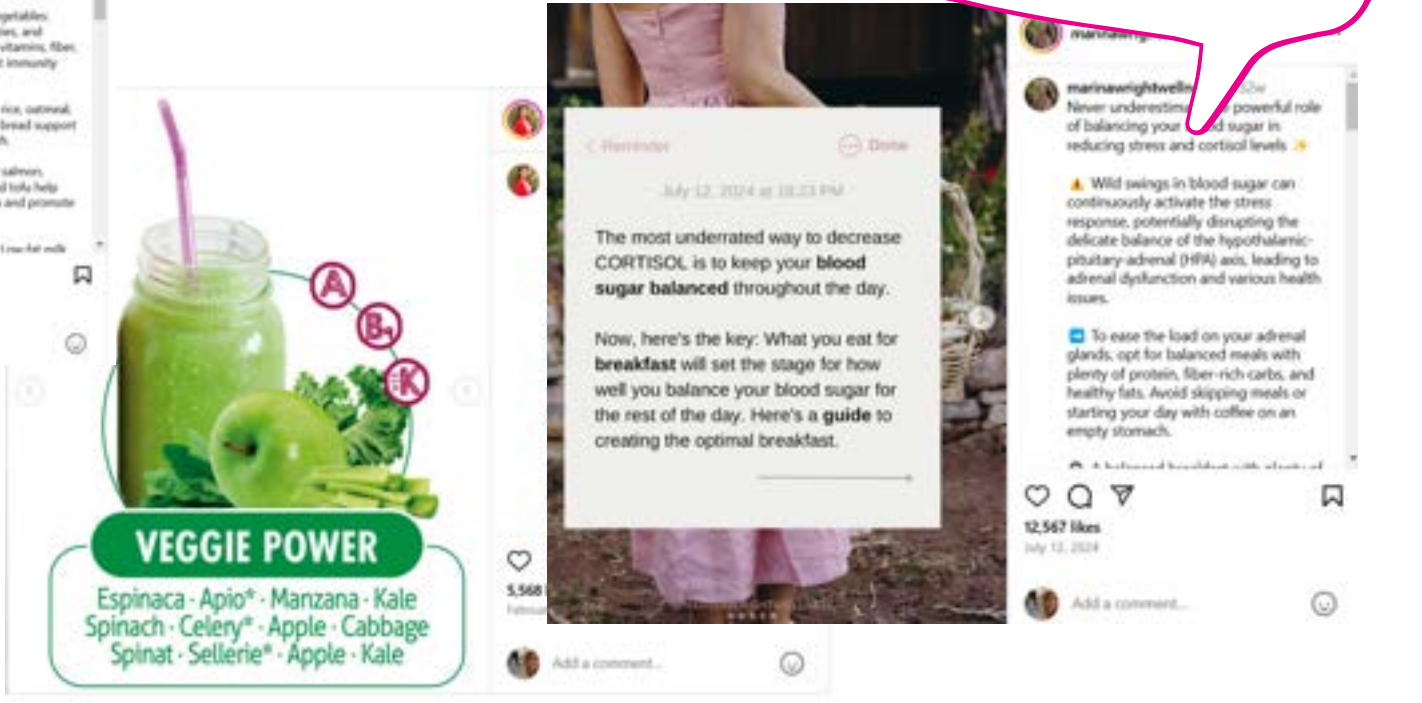
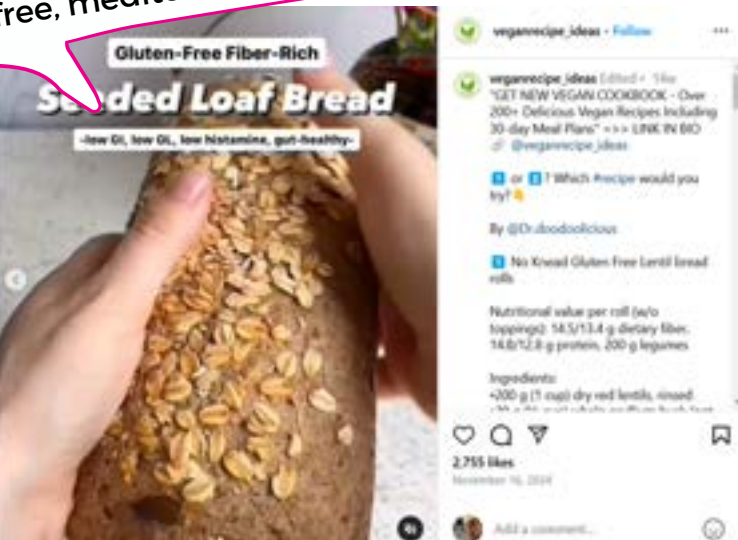
Energy & Muscle Support
Market the sustained energy benefits of combining fiber + protein, making products ideal for pre/post-workout or daily wellness



Highlight the Power of Satiety & Weight Management
Emphasize how fiber and protein work together to keep people fuller for longer, reducing cravings and supporting weight management.

Emphasize Coinciding Claims & Diets

Show how your products fit within keto, vegan, gluten-free, mediterranean diets for broader appeal



Who are the Wellness Segments?

Wellness Attitudinal and Behavioral Segmentation of U.S. Adults

Brightfield's Wellness Segments were created based on health behaviors and attitudes gathered in our quarterly survey of U.S. Adult general population consumers through statistical analysis modeling. We found Five distinct segments of consumers that all behave differently in the Health and Wellness market. Those 5 segments can be considered on a continuum where you can explore where new trends and products align from least to most receptive to new products and trends.

Least Trendy

Most Trendy

Detached
Traditionalists

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

Self-Focused
Savers

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

Better-Way
Believers

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

Wellness
Seekers

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

Trendy
Enthusiasts

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.

Stay ahead of all the wellness trends!

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

Explore Consumer Insights

Explore Social Listening

