

 **INDUSTRY  
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CENTER**

# WHAT THE 'BIOTIC

(are consumers thinking?)

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“The road to health is paved  
with good intestines!”

**Sherry A. Rogers, M.D.**  
Author

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**Interest in the  
microbiome space  
and terms is  
growing**

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**Consumers are searching 'biotic terms**

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**Gut Health**  
1.25 billion

**Microbiome**  
152 million

**Probiotics**  
196 million

**Prebiotics**  
19.6 million

**Synbiotics**  
3.15 million

**Postbiotics**  
1.57 million

Source: Google Trends 11.29.22

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**When we remove probiotics we see prebiotics rise to the top and interest in the other 'biotics remains pretty even**

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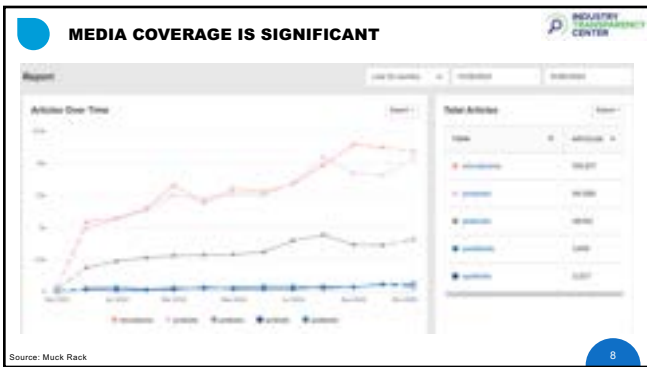
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Source: Muck Rack

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**Emerging Research Shows This Is The Missing Link For Skin Cancer, Acne & Aging**



**Are Probiotics Important for Gut Health?**

Source: Muck Rack 10

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## Insights into the 'Biotic Supplement Consumer'

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### Do consumers understand microbiome-related definitions?

- ITC Insights fielded a survey in the US and UK to help determine if consumers really understand microbiome terms.
- They were given a list of abbreviated definitions and had to identify the correct one.

Probiotics	Prebiotics	Synbiotics	Postbiotics
<ul style="list-style-type: none"> <li>• Live microorganisms in your gut</li> </ul>	<ul style="list-style-type: none"> <li>• Building block ingredient for bacteria</li> </ul>	<ul style="list-style-type: none"> <li>• Mix of bacteria and gut nourishing sources</li> </ul>	<ul style="list-style-type: none"> <li>• Dead cell material from bacteria</li> </ul>
<ul style="list-style-type: none"> <li>• Bad bacteria living in the gut</li> <li>• Imbalanced microbiome</li> <li>• Prescribed medication to kill bacteria</li> </ul>	<ul style="list-style-type: none"> <li>• Imbalanced microbiome</li> <li>• Nourishing source for bacteria</li> <li>• Research on bacteria</li> </ul>	<ul style="list-style-type: none"> <li>• Imbalanced microbiome</li> <li>• Bacteria feeding on each other</li> <li>• Balanced microbiome</li> </ul>	<ul style="list-style-type: none"> <li>• Drugs to kill fungus</li> <li>• Live cell material from bacteria</li> <li>• Partially digested material in the gut</li> </ul>

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### Do consumers understand microbiome-related definitions?

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Probiotics	Prebiotics	Synbiotics	Postbiotics
• Live microorganisms in your gut	• Building block ingredient for bacteria	• Mix of bacteria and gut nourishing sources	• Dead cell material from bacteria
• Bad bacteria living in the gut	• Imbalanced microbiome	• Imbalanced microbiome	• Drugs to kill fungus
• Imbalanced microbiome	• Nourishing source for bacteria	• Bacteria feeding on each other	• Live cell material from bacteria
• Prescribed medication to kill bacteria	• Research on bacteria	• Balanced microbiome	• Partially digested material in the gut

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### HOW CONSUMERS RESPONDED

The percent of respondents who correctly identified the correct definition:

	US		UK	
	2021	2022	2021	2022
Probiotics	62%	46%	66%	52%
Prebiotics	40%	38%	48%	40%
Synbiotics	32%	32%	35%	36%
Postbiotics	33%	29%	32%	31%

ITC Insights Snapshot Survey: Microbiome Definitions December 2021 and ITC Insights Snapshot Survey: Microbiome Definitions October 2022

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- Fielded Spring 2022
- Survey of 3,500 consumers
  - 1,000 US, 1,000 China, 500 UK, 500 Germany, 500 Italy
  - Supplement users
  - Corrected for people who have proclaimed they are 'not a user' in questioning

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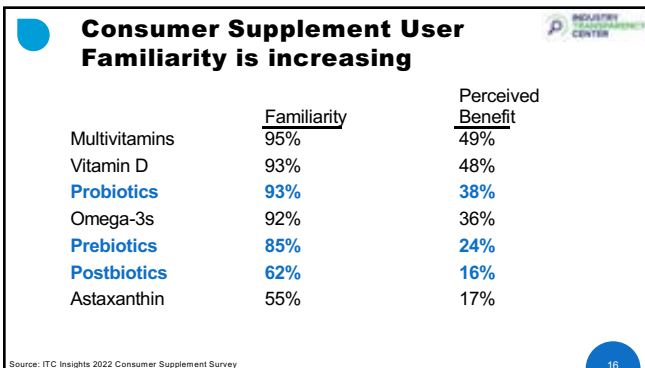
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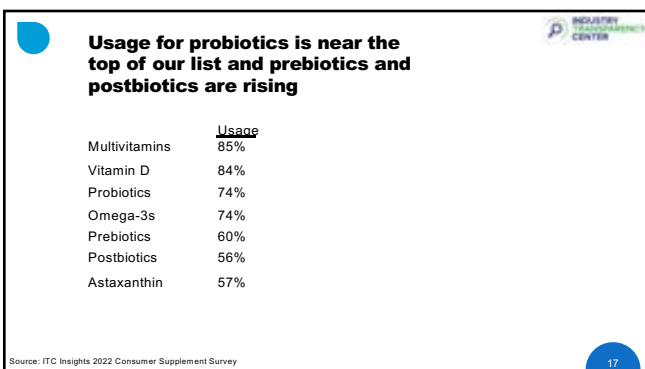
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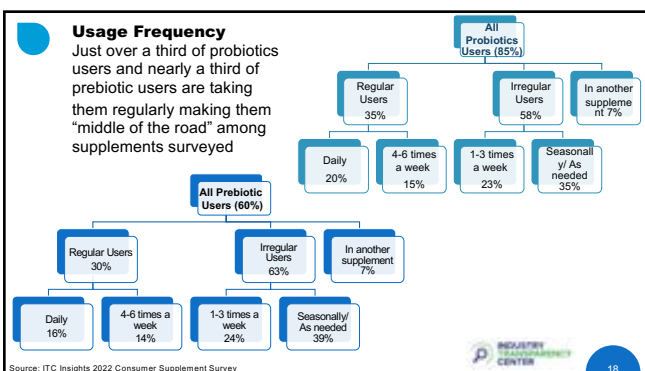
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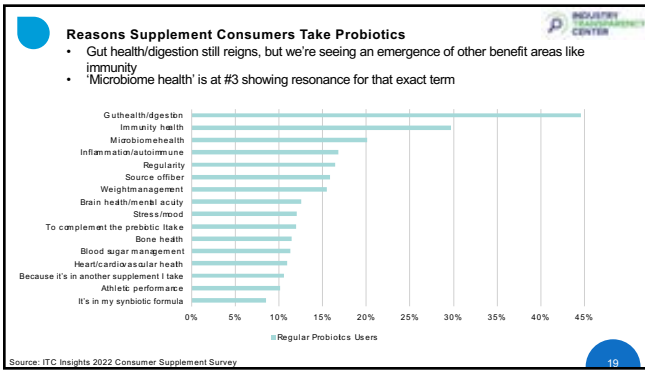
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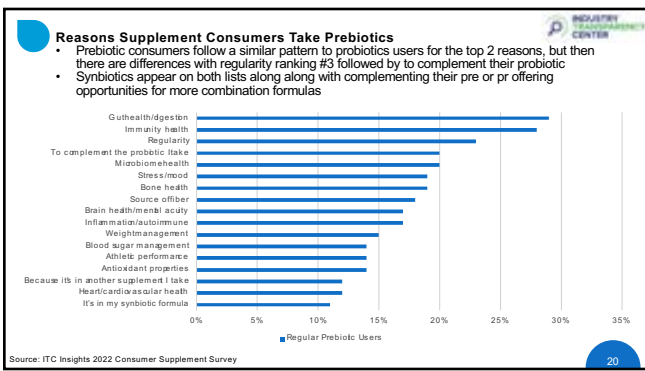
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We again see similarities across the 2 groups

PROBIOTIC USERS – TOP 5		PREBIOTIC USERS – TOP 5	
Health care professional recommendation	34%	Health care professional recommendation	27%
More info on the benefits	25%	More info on the benefits	23%
More science proving benefits	24%	More science proving benefits	20%
Family/friends recommend –or- Understanding of the microbiome	18%	Clear labeling	16%
Clear understanding of different types	17%	Family/friends recommend	15%

Education and clear messaging are key!

Source: ITC Insights 2022 Consumer Supplement Survey

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Values align across probiotic and prebiotic users






Transparency increases purchase intent for 78% of probiotic and prebiotic supplement consumers



75% of probiotic supplement users and 78% of prebiotic supplement users say sustainability impact their purchase decision



Recommendation from a health care professional is the top driver of trust for both groups

Source: ITC Insights 2022 Consumer Supplement Survey 25

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**Key Takeaways**



- In most areas, probiotic and prebiotic consumers behave in the same way
- Combination products offer opportunity to leverage consumer needs
- Education is KEY – consumers, health care professionals, industry and media
- Don't get ahead of the science – consumers want to know there is substantiation behind the product
- Tell the story and focus on benefits
- Interest in this space is rising and will continue to be a trend

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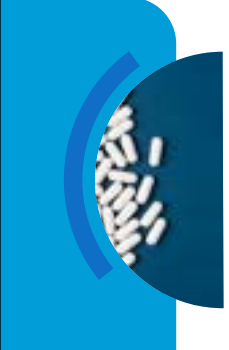

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# Thank You

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