



INSIGHTS INTO THE MICROBIOME MARKET

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microbiome



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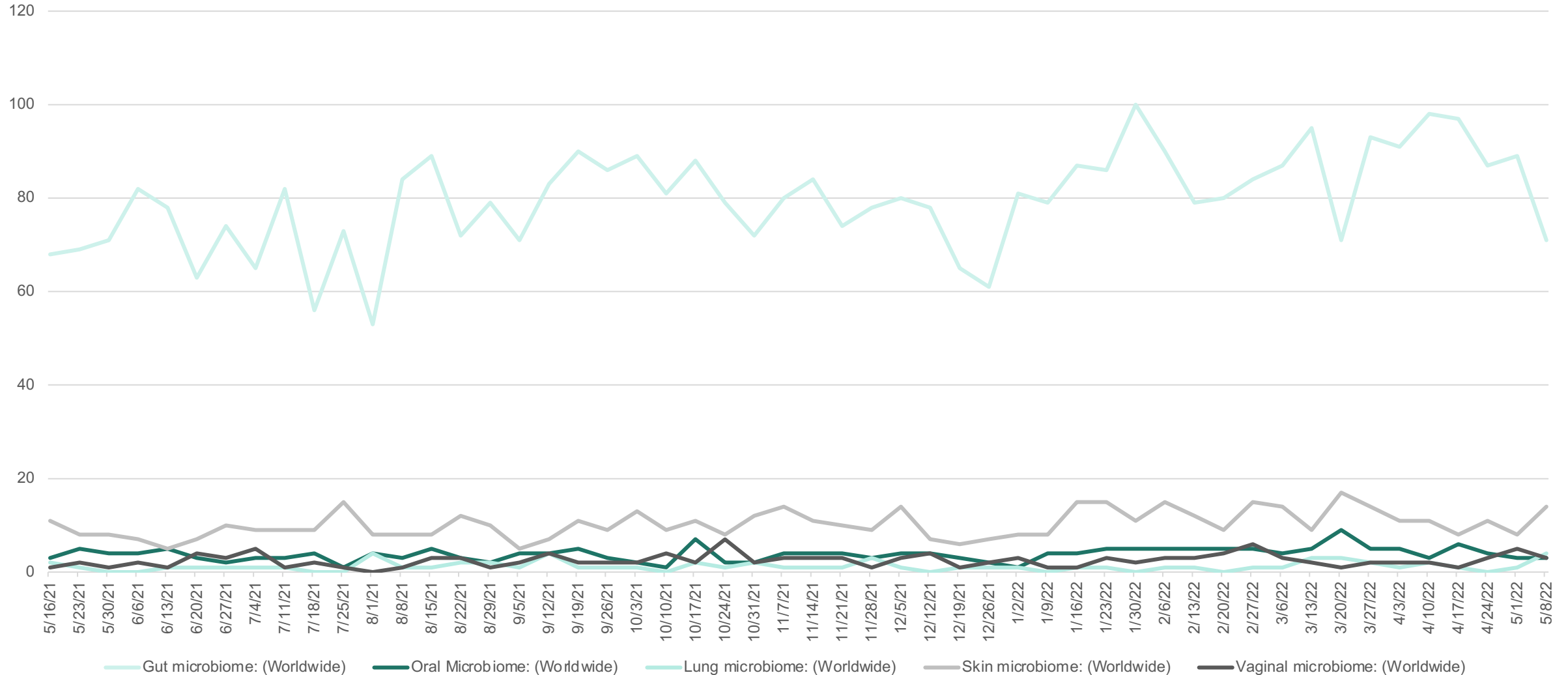
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About 1,050,000,000 results (0.58 seconds)

WHAT ARE PEOPLE SEARCHING?



Searches of the Major Human Microbiomes Over the Past 12 Months

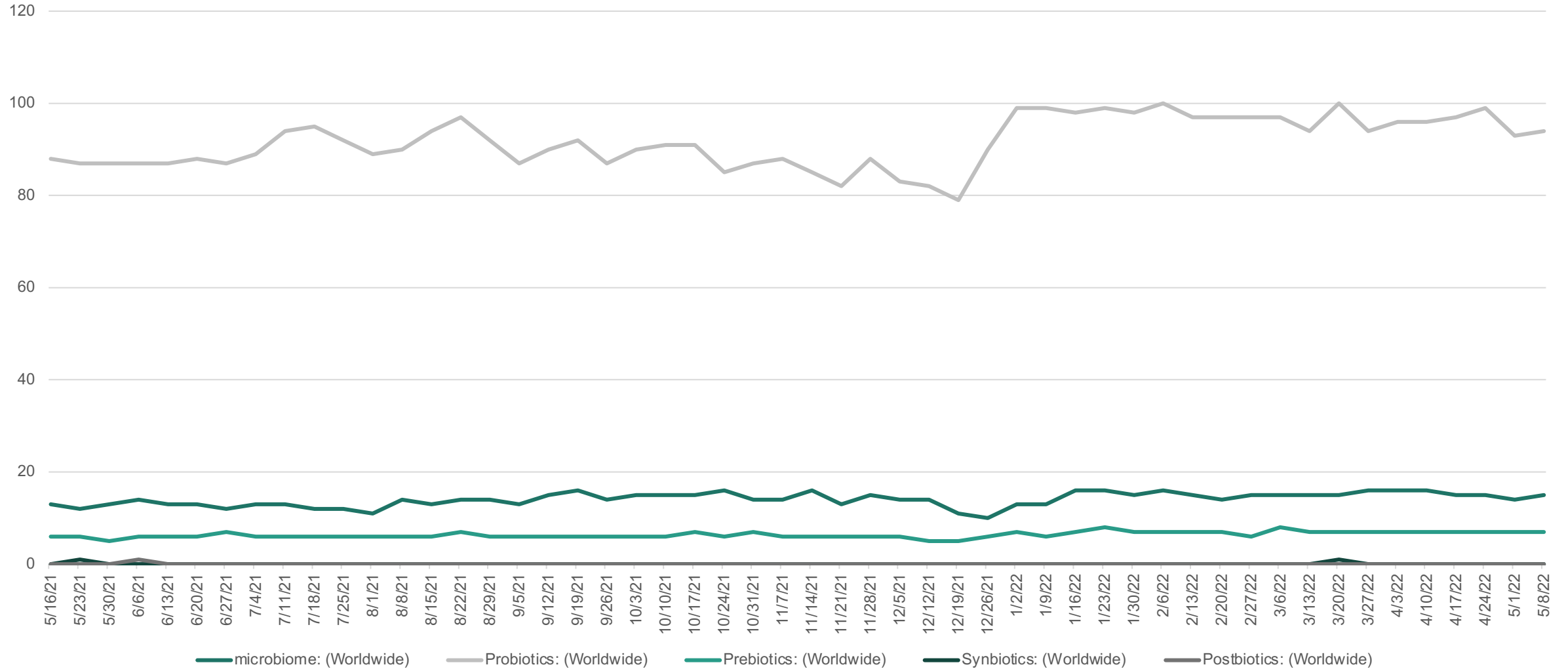


Source: Google Trends

WHAT ARE PEOPLE SEARCHING?



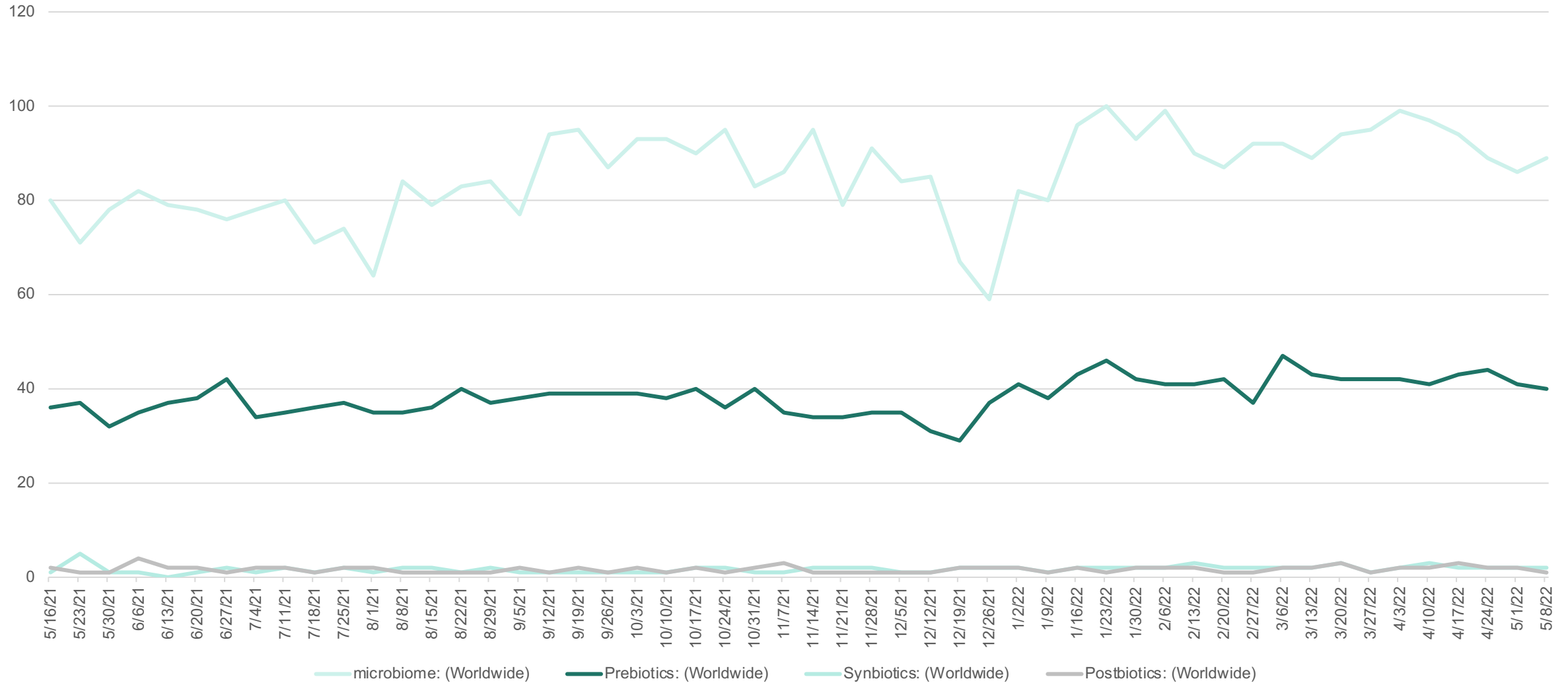
Microbiome-Related Search Terms Over the Past 12 Months



WHAT ARE PEOPLE SEARCHING?



Microbiome-Related Search Terms without Probiotics (past 12 months)





**BUT DO CONSUMERS
REALLY
UNDERSTAND?**



CONSUMERS WERE ASKED HOW MANY MAJOR MICROBIOMES DO WE HAVE?



WHAT ABOUT MICROBIOME ASSOCIATED TERMS?



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

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

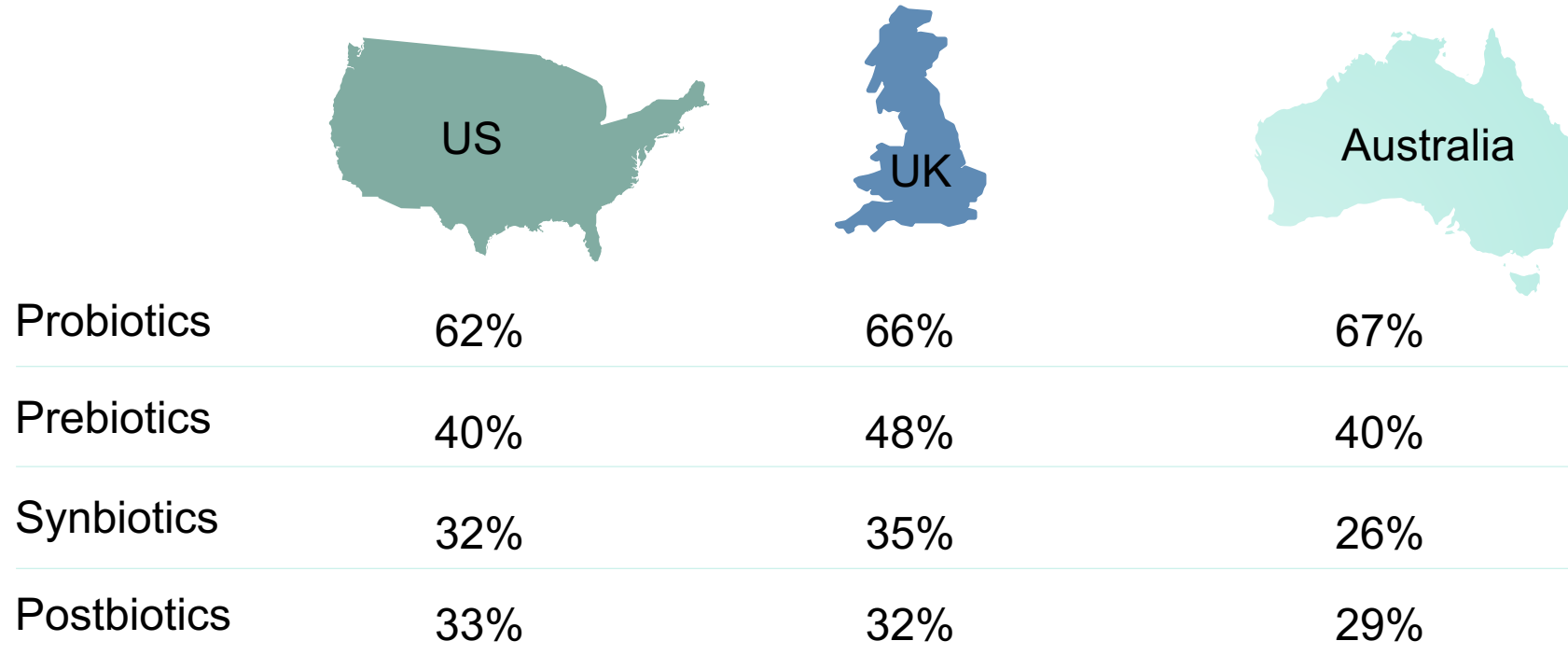
DO CONSUMERS UNDERSTAND MICROBIOME TERMS?



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

OVERALL CORRECT RESPONSES

The percent of respondents who identified the correct definition:



BREAKING IT DOWN FURTHER: GENDER



	MEN			WOMEN		
	US	UK	GERMANY	US	UK	GERMANY
PROBIOTICS	58%	61%	67%	64%	69%	69%
PREBIOTICS	35%	44%	37%	46%	52%	43%
SYNBIOTICS	33%	32%	47%	31%	36%	10%
POSTBIOTICS	33%	31%	31%	33%	36%	27%



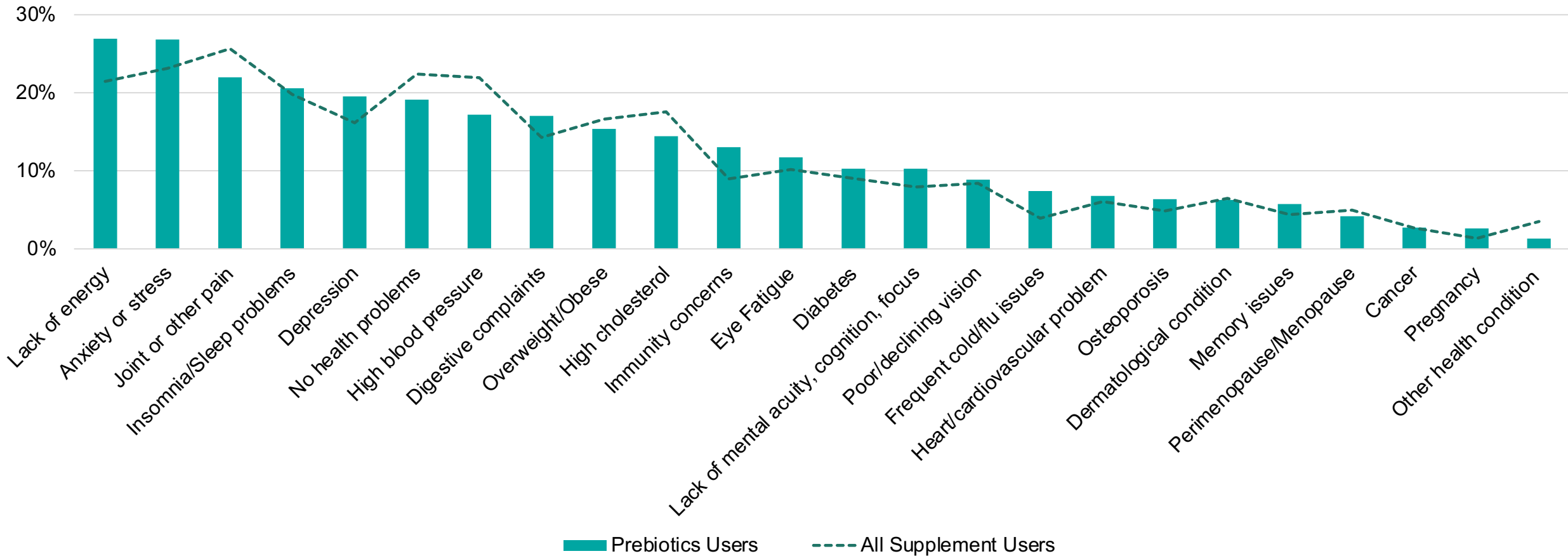
**DIGGING DEEPER:
ITC INSIGHTS 2021
CONSUMER SURVEY
HIGHLIGHTS**

PREBIOTICS USER HEALTH CONCERNS



KEY ITC INSIGHTS:

- Prebiotics users' health concerns show growth of those stating lack of energy, meaning lack of energy has caught up to anxiety as the most prominent concern
- Other conditions where prebiotic users over-index are depression, digestive complaints and immunity
- Prebiotics users strongly under-index for high blood pressure, and to a slightly lesser degree, joint pain and high cholesterol



Note: Prebiotic users n=768, all supplement users n=2000. Question: "Which of the following health conditions impact you currently or have impacted you within the past year?" 'No health concern' added for 2021 survey.



KEY ITC INSIGHT:

- Many of these expressed health concerns for which consumers are seeking a nutrition-oriented solution have an association with the microbiome in some way

	# of people who claim as a condition	% who claimed condition seeking nutritional improvement
Diabetes	99	79%
Digestive complaints	108	73%
High cholesterol	274	62%
Overweight/Obese	173	62%
Pregnancy	19	58%
Lack of energy	181	55%
Heart/cardiovascular problem	52	54%
Immunity concerns	53	53%
High blood pressure	296	53%
Anxiety or stress	244	45%
Osteoporosis	44	43%
Lack of mental acuity, cognition, focus	69	41%
Cancer	37	41%
Joint or other pain	216	38%
Insomnia/Sleep problems	167	38%
Depression	159	35%
Dermatological condition	60	30%
Poor/declining vision	75	27%
Perimenopause/Menopause	42	24%

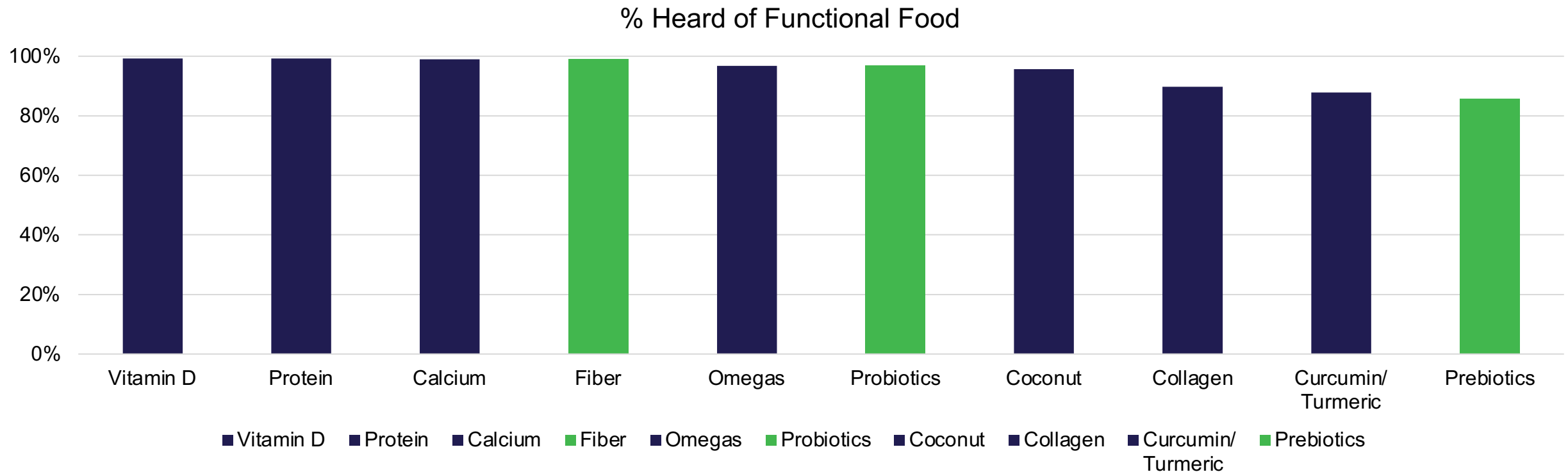
Note: All respondents n=1000. Question: “For the health conditions that have impacted you in the past year, for which ones did you seek to improve the condition by seeking specific active nutritional ingredients in the food that you purchased/consumed?” n= varies for each health condition. Percentages of consumers suffering from health condition and claims to be seeking treatment.

FAMILIARITY WITH CONSUMPTION: FUNCTIONAL FOODS



KEY ITC INSIGHTS:

- Most consumers have at least basic familiarity with these functional ingredients with the top four at essentially 100%
- Omega-3s and probiotics have become household familiar terms and even emerging ingredients such as prebiotics are extremely familiar at over 80%

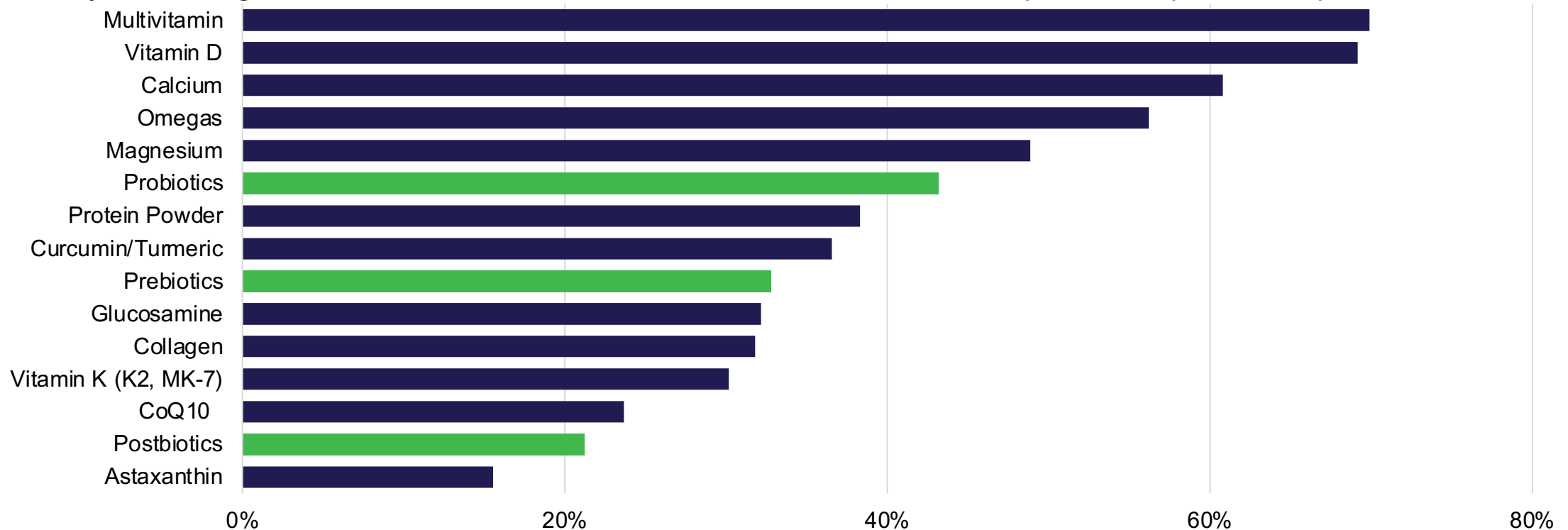


FAMILIARITY WITH USE: SUPPLEMENTS



KEY ITC INSIGHTS:

- Microbiome associated ingredient categories show strong familiarity with supplement users, lagging of course behind core categories such as vitamin D, omega-3s and even magnesium which has shot up in recent years
- These latter categories are good models in establishing broad familiarity
- As a 'younger' category, prebiotics familiarity at well over 30% for all supplement users, not only those using prebiotics is promising
- Familiarity with postbiotics is surprising at already over 20% indicating either that microbiome related solutions are generally resonating well with consumers or there is confusion over the terms probiotics/ prebiotics/ postbiotics



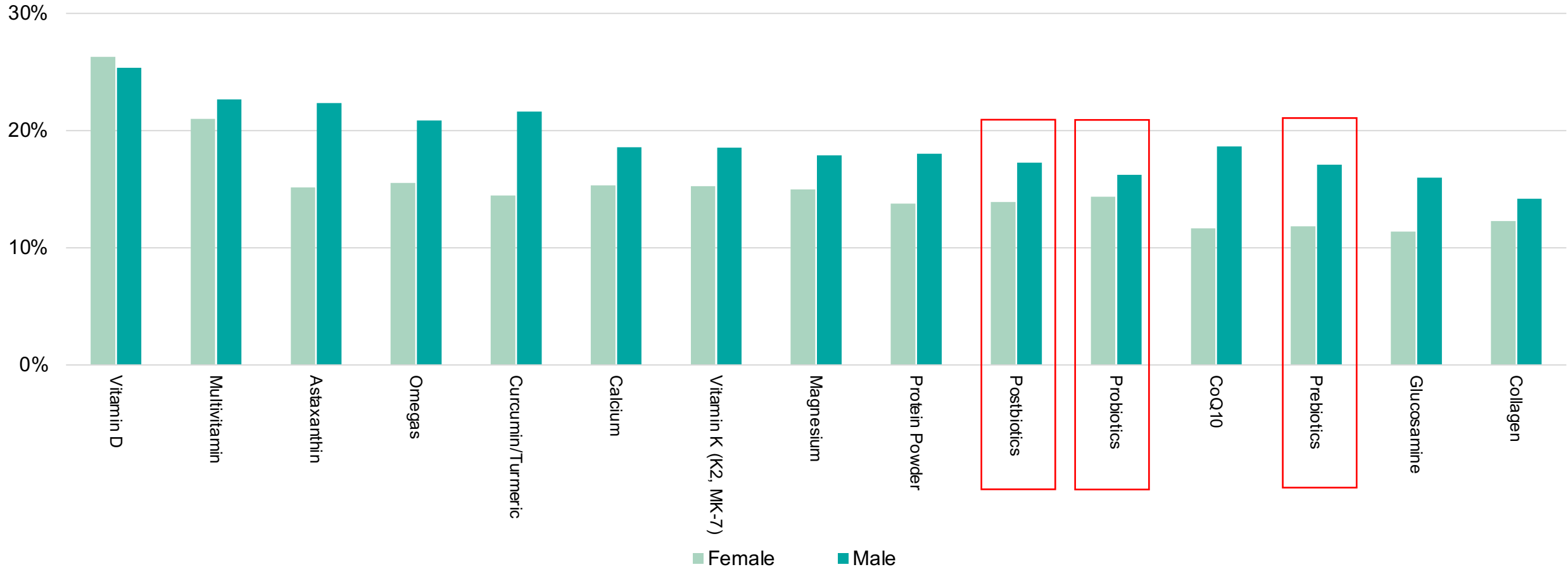
Note: All supplement users n=2000, top 2 summary = very + extremely combined. Question: "How familiar would you consider yourself regarding the use of these supplements?"

INCREASE IN USAGE LEVELS: GENDER



KEY ITC INSIGHTS:

- Males over-index in usage for supplements in most cases, but especially related to the microbiome



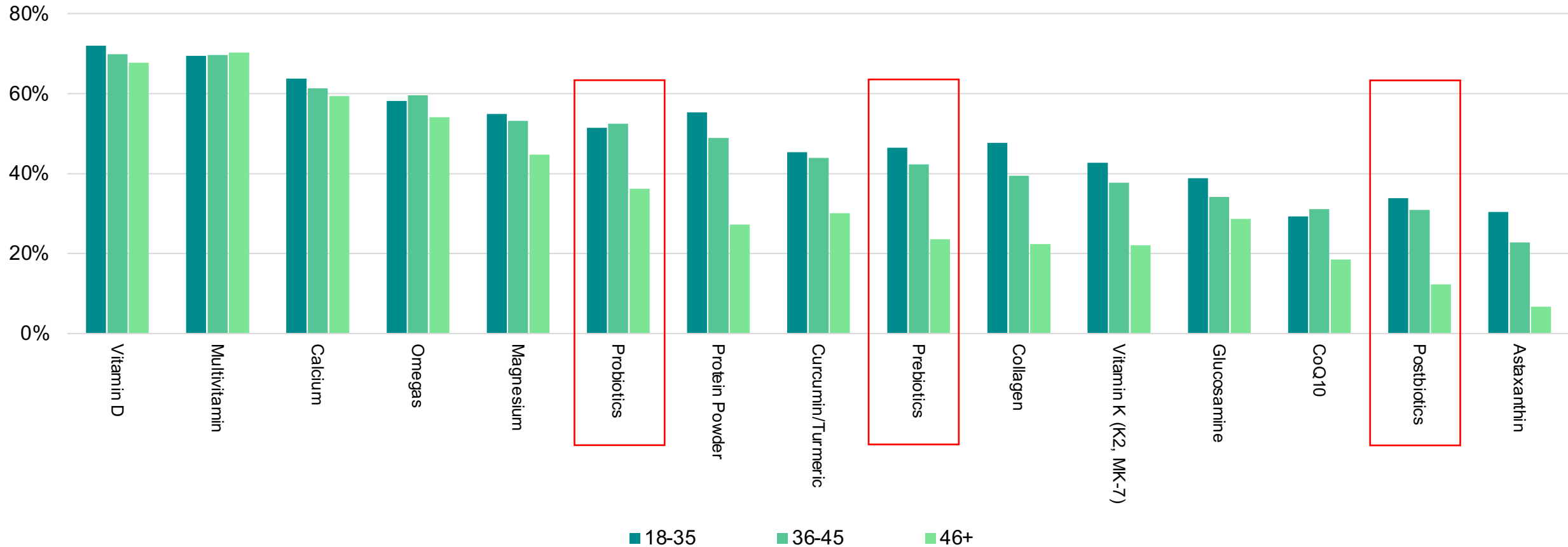
Note: Gender breakout varies by supplement users, claiming to taking more. Question "Which of the following best describes how your use of each of these supplements compares to your usage 1 year ago?"

FAMILIARITY WITH USE: AGE



KEY ITC INSIGHT:

- Younger consumers are inevitably the most familiar, and this phenomenon is most significant in microbiome-related ingredient categories
- Translating familiarity into purchase is therefore the objective



Note: 18-35 n=461, 36-45 n=421, 46+ n=1118, top 2 summary = very + extremely combined, respondents were able to choose more than one answer choice. Question: "How familiar would you consider yourself regarding the use of these supplements?"

**IN THE LAST 10 YEARS,
OVER 108K STUDIES
RELATED TO THE
MICROBIOME ARE
AVAILABLE ON PUBMED**



A screenshot of the PubMed.gov website showing search results for the term "microbiome". The page header includes the NIH logo and "National Library of Medicine National Center for Biotechnology Information" with a "Log in" button. The search bar contains "microbiome" and a "Search" button. Below the search bar are links for "Advanced", "Create alert", "Create RSS", and "User Guide". The results section shows "Save", "Email", and "Send to" buttons, along with "Sorted by: Most recent" and "Display options". At the bottom, it shows "MY NCBI FILTERS", "108,859 results", and pagination for "Page 1 of 10,886".