

Naturally Informed Microbiome: Mastering the Market

## INSIGHTS INTO 'BIOTIC' SUPPLEMENT CONSUMERS

### DEEP DIVE INTO GUT/BRAIN AND INFLAMMATION TARGETS

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May 24, 2023

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**WHEN IT COMES TO 'BIOTICS, GUT HEALTH BENEFITS ARE WIDELY UNDERSTOOD**

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Search for gut health products on Amazon yields over 3,000 results

Same search on Google yields over 65 million results!

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2

**OVERALL MICROBIOME HEALTH AWARENESS IS GROWING AND PRESENTING NEW OPPORTUNITIES FOR EMERGING BENEFIT AREAS**

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**MENTAL HEALTH IS ONE OF THE TOP GLOBAL HEALTH CONCERNS**




“Mental disorders are a leading cause of disability worldwide, with no evidence of a decrease in this burden since 1990.”  
Alize Ferrari, IHME

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**GUT-BRAIN CONNECTION BECOMING MORE UNDERSTOOD**





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**'Biotic consumer interest in mental health is high**



**58%** of prebiotic supplement users said that an area of mental health\* is a concern

**56%** of probiotic supplement users have mental health concerns

**55%** of synbiotic and postbiotic supplement users said that an area of mental health\* is a concern

\* Mental health concerns included: Anxiety or stress, depression, lack of mental acuity, insomnia/sleep problems, memory issues or mood

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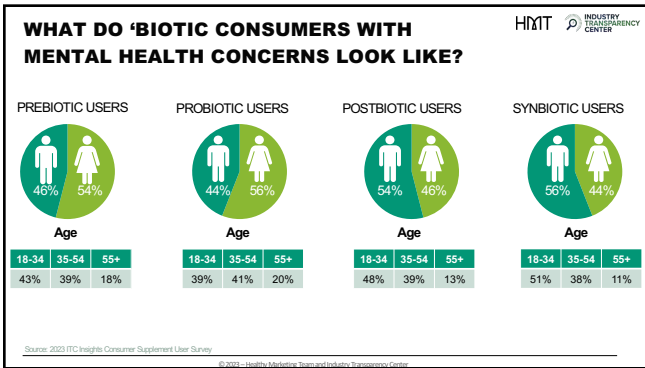
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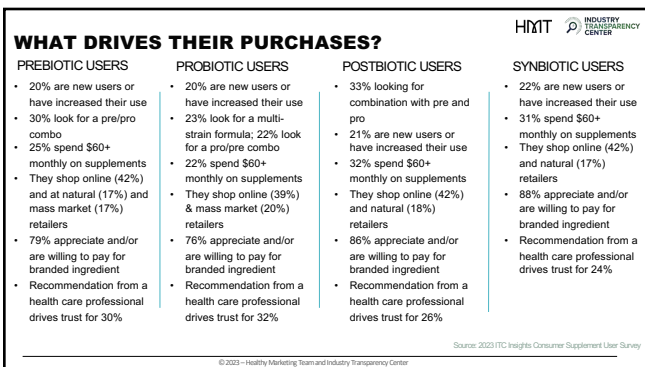
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HMTT	
Technology Stakeholder	
• Psychobiotic to cope with stress	
<p><b>Trend expression</b></p>  <p><b>Zenbiome™ COPE</b> Designed to help clients better handle life's occasional stressors. Targeted support for coping with day-to-day stressors and mood changes.</p>	<p><b>Benefit Insights</b></p> <ul style="list-style-type: none"> <li>• Supports healthy mood</li> <li>• Promotes better occasional stress coping</li> <li>• Supports brain function</li> <li>• Enhances vitality</li> </ul> <p><b>Ingredient Insights</b></p> <ul style="list-style-type: none"> <li>• Psychobiotic 1714™</li> <li>• Vitamin B6, 12</li> <li>• Herbal extracts</li> <li>• target the gut-brain axis</li> <li>• support occasional stress, mild mood changes, low energy, fatigue, and sleeplessness</li> </ul>

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HMTT	
Narrative: SCIENCE	
<p><b>Founded by Experts</b></p> 	<p><b>Backed by latest science &amp; research</b></p>  <p><b>The Gut-Brain Axis and the Psychobiome</b> The gut-brain axis, a bidirectional communication between gut microbes and the central nervous system (CNS), plays a role in cognitive function, digestion, and mood. Studies show that 80-90% of the fibers in the vagus nerve are linked to the gut, providing a physical link through which the gut microbiome communicates with the brain. Recently, the term psychobiome is used to describe the interaction between a person's collective microbiome and their mental state. A diverse and balanced microbiome can help maintain the gut-brain axis. A psychobiotic is used to describe the commercial products that play a role in the gut-brain axis and support brain health.</p>  <p><i>Stress, The Modern Epidemic</i></p>  <p><i>1714™ A Train-Healing Psychobiotic</i></p> <p><b>Detailing the mode of action</b></p>
<p><b>Physical link through which the gut microbiota communicate with the brain</b></p>	

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HMTT	
Lifestyle Stakeholder	
• Balanced gut, balanced mind mood.	
<p><b>Trend expression</b></p>  <p><b>Hers Mood Mental Health Probiotic</b> A daily care women's supplement for healthy mood balance. "Get a good gut feeling."</p>	<p><b>Benefit Insights</b></p> <ul style="list-style-type: none"> <li>• Promote the feeling of calm</li> <li>• Naturally manages mood balance</li> <li>• Balanced gut, balanced mind.</li> </ul> <p><b>Ingredient Insights</b></p> <ul style="list-style-type: none"> <li>• 30 Probiotics blend</li> <li>• Vitamin B, D</li> <li>• Ashwagandha</li> <li>• L-theanine</li> <li>• Formulated to promote digestive balance and emotional well-being</li> </ul>

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Narrative: SELF Premium and Treating Me...

Take care of your whole self!




Elevate my well-being Personal Touch

Mind-body connection

Hers is formulated with ingredients that help promote feelings of calm and naturally manage your mood by supporting the gut-brain axis and keeping everything in balance.

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HMT

Early Mass Stakeholder

All-in-one benefits + mental health

Trend expression



Yourbiology Gut+

Benefit Insights

- Reduced stress levels
- Boosted energy & focus
- Improved digestion
- Feeling lighter and slimmer
- Strengthened immunity
- Improved Mood
- Effect within 2 weeks

Ingredient Insights

- 40 billion CFUs of 4 strains
- Prebiotics
- 250 times better survival rate
- support overall gut health + mood

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HMT

Mass Stakeholder

Digestive + De-stress


Trend expression



Align Digestive De-Stress Probiotic + Ashwagandha Gummies. Daily stress may disrupt your natural balance of good gut bacteria. Align Digestive de-stress delivers digestive and stress support\*

Benefit Insights

- Support digestive health
- Help calm mind and body from stress



Ingredient Insights

- Probiotics
- Ashwagandha
- Bifidobacterium Doctor's recommended probiotic brand

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**INFLAMMATION CONCERNS ON THE RISE**

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*Chronic inflammatory diseases are the most significant cause of death in the world. The World Health Organization (WHO) ranks chronic diseases as the greatest threat to human health.*



**Side Effects of Inflammation, Say Doctors**  
Inflammation is the body's natural response to injury and infection.



**Inflammation May Be the Culprit Behind Our Deadliest Diseases**

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**'BIOTICS AND INFLAMMATION ARE LINKED**




**Impact of probiotics on intestinal response: from the bench to the clinic**

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**'Biotic consumer interest in inflammation concerns is rising**

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**34%** of prebiotic supplement users said that inflammation is a concern

**35%** of probiotic supplement users

**30%** of postbiotic supplement users

**21%** of synbiotic supplement users

\* Inflammation concerns included: Inflammation or joint/other pain  
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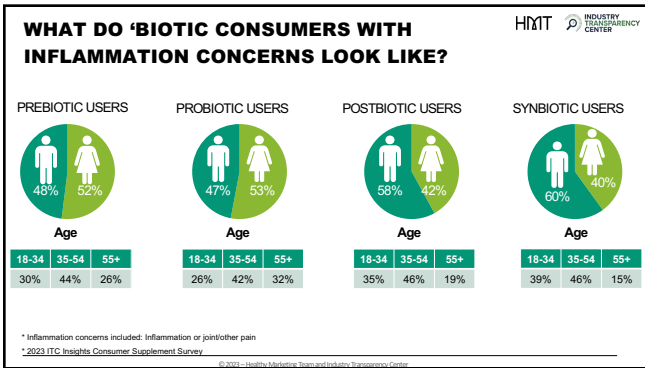
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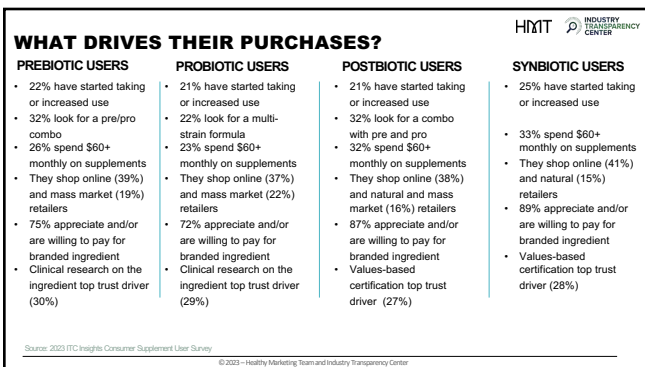
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<b>HMT</b>	
<b>Technology Stakeholder</b>	
<b>• MicrobiomeX® to support a mucosal barrier</b>	
<p><b>Trend expression</b></p>  <p><b>MegaMucosa 180</b> The first complete mucosal support supplement of its kind, formulated to support a healthy mucosal barrier.</p>	<p><b>Benefit Insights</b></p> <p>The first complete mucosal support supplement of its kind</p> <p>The mucosal system is a very important part of the human defense system. The mucosal system contains 100 times more surface area than skin, which makes it an essential element of the immune system that supports healthy immune function.</p> <p><b>Ingredient Insights</b></p> <ul style="list-style-type: none"> <li>dairy-free immunoglobulins</li> <li>MicrobiomeX® (a state-of-the-art flavobiotic)</li> <li>clinically shown to support a healthy immune system in the mucosa</li> <li>shown to support microbial diversity and short-chain fatty acid production.</li> </ul>

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<b>HMT</b>	
<b>Lifestyle Stakeholder</b>	
<b>• Healthy GUT As the centre of the body's ecosystem</b>	
<p><b>Trend expression</b></p>  <p><b>The NUE CO. PREBIOTIC + PROBIOTIC</b> Everything starts with a healthy gut. As the centre of the body's ecosystem, it's connected to your brain, immune system and skin - the key to well-functioning, all-round health.</p>	<p><b>Benefit Insights</b></p> <ul style="list-style-type: none"> <li>Reinforce the good bacteria</li> <li>Help symptoms of IBS</li> <li>Support gut and mental health</li> <li>Improves Immunity</li> </ul> <p><b>Ingredient Insights</b></p> <ul style="list-style-type: none"> <li>15 billion LACTOSPORE (BACILLUS COCCULANS)</li> <li>Organic Inulin (From Jerusalem artichoke root)</li> <li>delivers to reinforce the good bacteria in your gut and support the microbiome.</li> </ul>

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<b>HMT</b>	
<b>Early Mass Stakeholder</b>	
<b>• A healthy gut is key to overall wellness.</b>	
<p><b>Trend expression</b></p>  <p><b>THORNE, FloraMend Prime Probiotic®</b> A healthy gut is key to overall wellness. Digestive health, immune function, and the state of your mood are dependent on the health of your gut and its microbiome.</p>	<p><b>Benefit Insights</b></p> <ul style="list-style-type: none"> <li>Occasional digestive upset</li> <li>Support immunity &amp; a seasonal allergy</li> <li>Positive mood and healthy outlook</li> <li>Improve weight management</li> </ul> <p><b>Ingredient Insights</b></p> <ul style="list-style-type: none"> <li>Lactobacillus gasseri KS-13,</li> <li>Bifidobacterium longum MM-2,</li> <li>Bifidobacterium bifidum G9-1 Blend</li> <li>balanced gut flora for healthy neurotransmitter production</li> </ul>

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HMT			
Different consumers, different expectations			
• Technology stakeholder	• Lifestyle stakeholder	• Early mass stakeholder	• Late mass stakeholder
Help my condition <ul style="list-style-type: none"> <li>• Proven ; Expert-led</li> <li>• Psychobiome : mucosal system</li> <li>• Narrative: Science</li> </ul> 	Positive change <ul style="list-style-type: none"> <li>• Belief-Driven, Premium</li> <li>• Mind-Body Connection</li> <li>• Inner eco-system</li> <li>• Narrative: Self</li> </ul> 	Better for me & my family <ul style="list-style-type: none"> <li>• Benefit-led</li> <li>• Gut+</li> <li>• Prime Probiotic</li> <li>• Narrative: Pragmatic</li> </ul> 	I only take what I know <ul style="list-style-type: none"> <li>• Familiar ingredients, understanding</li> <li>• Digestion &amp; Stress</li> <li>• Narrative: Trust</li> </ul> 

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### KEY TAKEAWAYS & OPPORTUNITIES

- Think 'beyond the gut' for biotic products. While digestive health still dominates, the gut/brain connection and inflammation offer new opportunities
- Choose your consumer target(s) wisely—you're better served from honing in using the guidelines presented vs. trying to be all things to all consumers/brands
- Probiotic and prebiotic supplement consumers are similar in demographic and tend to skew female and older; synbiotic and postbiotic consumers skew male and younger – target accordingly



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## Q&A



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Email us if you'd like a copy of consumer personas that match these benefit areas

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