

Insights Into the Microbiome Market

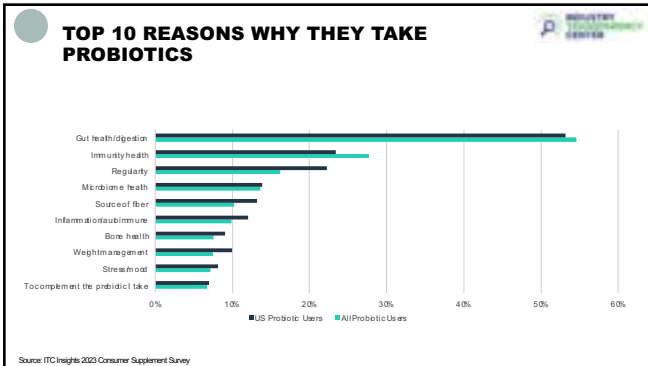
Len Monheit
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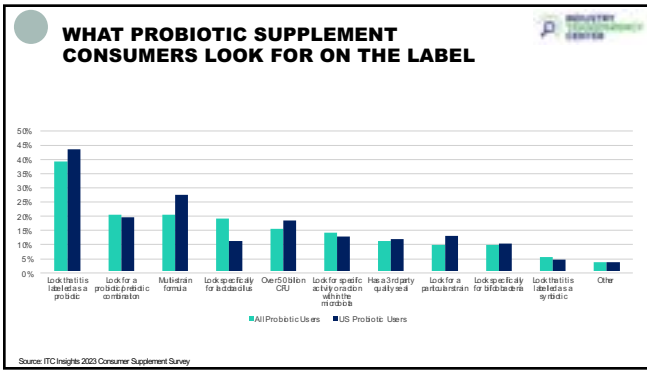
69%
 of supplement consumers
 are taking a 'biotic'
 (probiotic, prebiotic, synbiotic, postbiotic)

ITC Insights 2023 Consumer Supplement User Survey

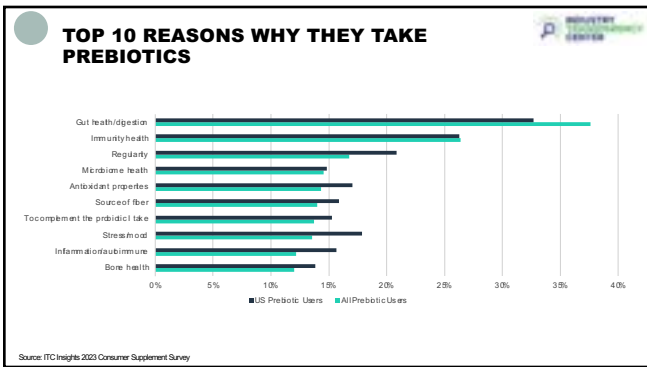
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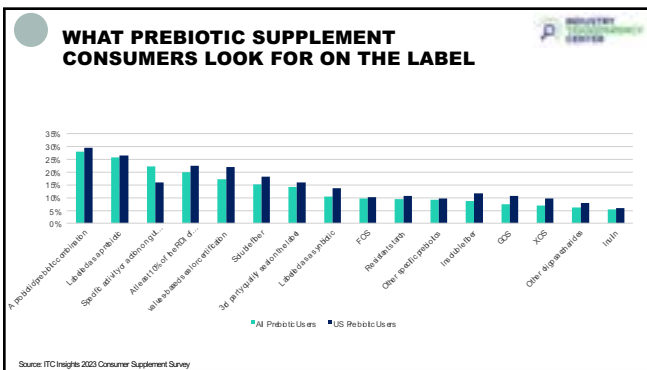
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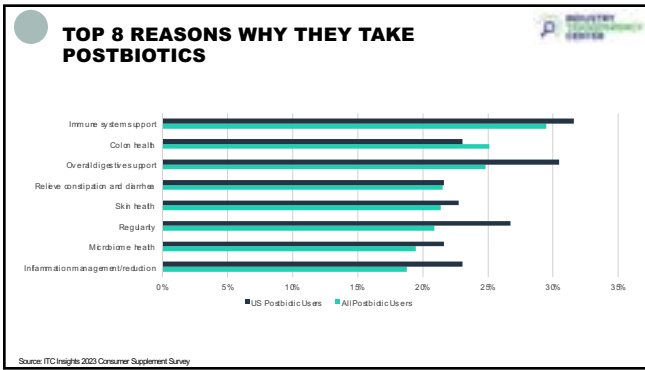
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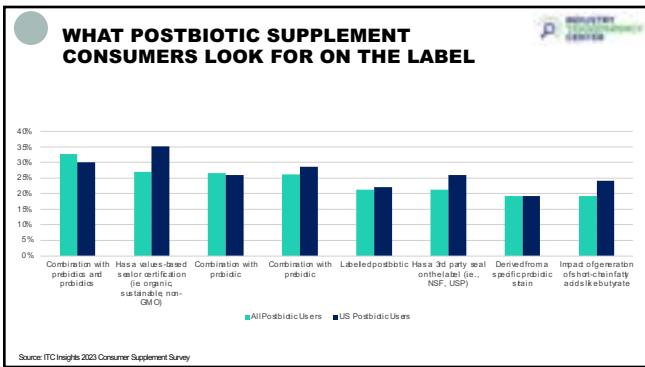
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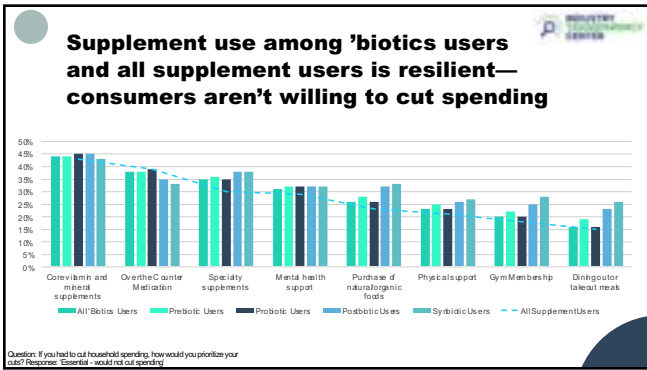
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Converting irregular users to regular users is a market opportunity

	All Usage from those familiar	Regular Users		Irregular Users		It's in another supplement I take
		Daily	4-6x/week	1-3x/week	Seasonally As Needed	
Multivitamin	87%	39%	14%	18%	24%	4%
Vitamin D	85%	32%	12%	20%	27%	9%
Omega-3s	73%	30%	13%	20%	31%	6%
Magnesium	72%	24%	13%	22%	33%	8%
Calcium	72%	24%	13%	20%	32%	11%
Probiotics	65%	22%	14%	21%	38%	5%
Prebiotics	47%	17%	16%	20%	41%	6%
Postbiotics	31%	16%	18%	23%	38%	5%
Synbiotics	25%	14%	23%	25%	34%	4%

Source: ITC Insights 2023 Consumer Supplement Survey

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They appreciate and are willing to pay for branded ingredients

- 76%** of probiotic supplement users
- 80%** of prebiotic supplement users
- 87%** of postbiotic users
- 88%** of symbiotic users

32% of symbiotic users always look for and are willing to pay for branded ingredients

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Key Takeaways

- 'Biotic' supplements increasingly are essential
- There is a huge opportunity to migrate irregular users to regular users, especially since this is the only way there will be true benefit
- Cut health followed by immunity are the leading reasons users are taking probiotics and prebiotics; for postbiotics, reasons are a bit more diverse with immunity leading
- US users are a bit more discerning than those in other countries; for probiotics, they over-index in seeking a multi-strain formula, for prebiotics and postbiotics, they over-index for looking for a seal or certification
- For all users, we are seeing an increasing search for combination microbiome targeting products, whether that is probiotic and prebiotic or even postbiotic with one or both

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QUESTIONS?

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