



FMCG Gurus | Bespoke Presentation | June 2025

The Gut Microbiome & What's Next

Targeting Day-to-Day Health in an era of Uncertainty



Consumer Experts, Insight Driven

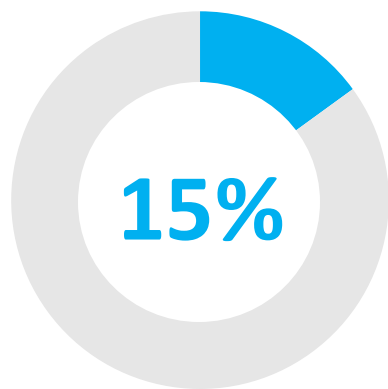


There has been a noticeable jump in the proportion of consumers familiar with the gut microbiome

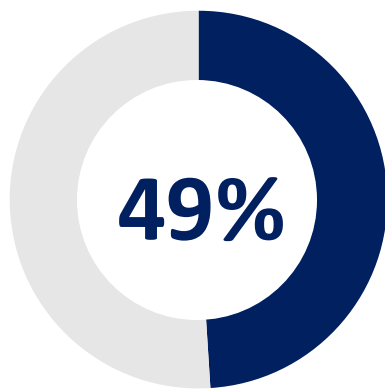
Moreover, consumers recognize the importance of beneficial bacteria

The proportion of consumers who have heard of the microbiome or gut microbiome/microbiota. (PRE288)

Global



2022



2024

The jump in awareness of the gut microbiome can be attributed to NPD, social media, and marketing.

Even if consumers are unaware of the phrase, they recognize the principle of beneficial bacteria in the gut.



This highlights how over the last decade, attitudes towards the role of the gut on health continues to evolve.

Consumers recognize that the gut impacts on physical health and to a lesser extent, emotional wellness.



Consumers are changing their diets and lifestyles as awareness of the gut microbiome grows

Consumers recognize the link between the gut and longevity

59%

of global consumers who are aware of the microbiome or beneficial bacteria have made changes to their diets as a result. 2024 (PRE743)

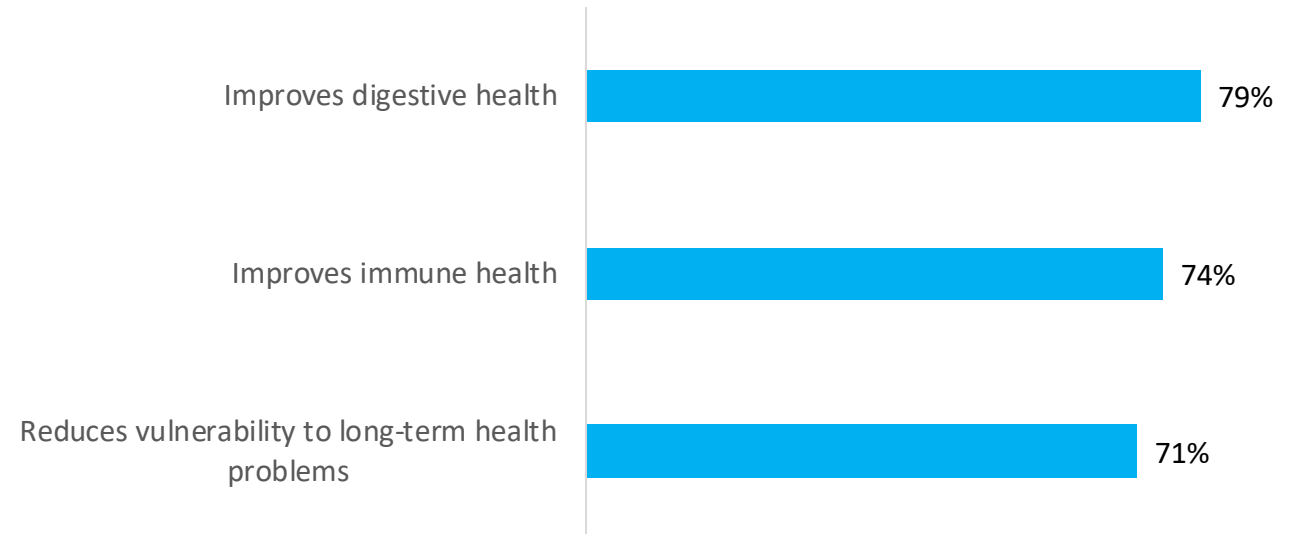


Consumers recognize their diets and lifestyles are not as healthy as they should be, and this can impact the gut.

As such, raised awareness of the gut microbiome is resulting in changes to diets, such as increasing fiber intake.

What benefits do you associate with the supports of a healthy gut microbiome? 2024 (PRE891)

Global – Top three answers – Consumers who are aware of the gut microbiome.



Consumers are more likely to be making general changes rather than visiting healthcare professionals.

Over the next decade, the link between the microbiome and longevity will become more established.



Despite the importance of digestive health, consumers are not satisfied with this area of well-being

Gut-related symptoms can be common across the globe

What health concerns do you have? (DH405) 2024

Global – Top three answers



47%

of global consumers say they suffer from gas at least some of the time. 2025 (DH777)



Consumers can be prone to suffering symptoms such as gas, bloating, and irregular bowel movement.

This is something that is often self-inflicted due to the diets and lifestyles that consumers lead.

Other factors such as allergies and intolerance, ageing, and climate change can impact digestive health.

Poor digestive health will lead to concerns that symptoms reflect low levels of health in general.

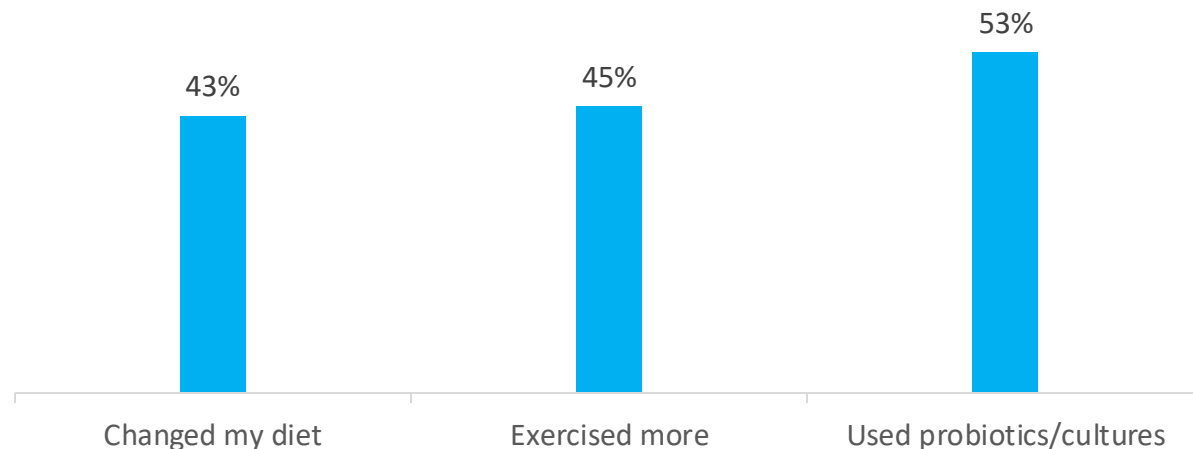


Consumers are taking steps to try and address their digestive health

Consumers are seeking out functional products that they feel offer something extra

Over the past twelve months, have you taken any of the following steps to address digestive health problems? 2024 (DH831)

Global – Top three answers



The appeal of probiotics shows how consumers are seeking out something “extra” to support health goals.

When seeking out functional products, consumers will prioritize multiple health claims backed up with science.

47%

of global consumers would like to boost their energy levels by turning to products that help aid digestive health. 2024 (DH255)

On the reverse, consumers are also adopting a back-to-basic approach to nutrition from a dietary perspective.

In addition, consumers realize that traits such as inactivity can have a negative impact on the gut.



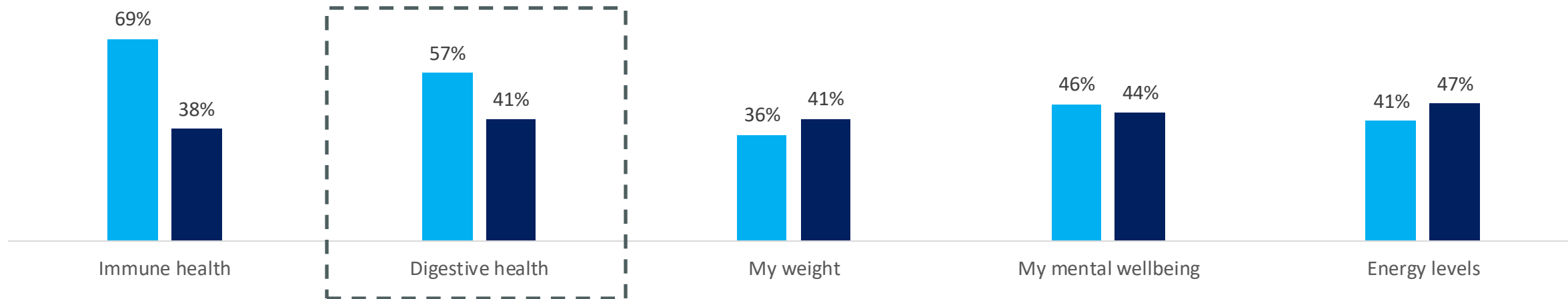
However, there has been a drop off in those wanting to address their digestive health over the next twelve months

This is due to the “normalization” of the health and wellness market

Do you plan to improve any of the following areas of health over the next twelve months? (MOB592)

Global – Top five answers

■ 2022 ■ 2024



Compared to a few years earlier, consumers are less driven by fear of illness and disease.

Consumers are more likely to evaluate their health based on how they feel and what they see in the mirror.

Consumers also feel that barriers to wellness that impact day-to-day living are on the rise.

This means that consumers are re-prioritizing what areas of well-being they are looking to address.



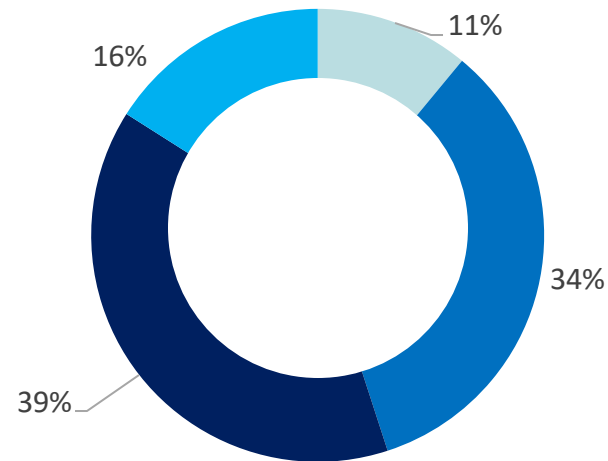
Consumers are looking to address their emotional wellness in an era of uncertainty

Addressing mood, stress levels, and fatigue is a priority at a time when many feel they are trapped in a vicious cycle



In the average week, how often do you feel stressed and/or anxious? 2024

Global



- Never
- Rarely
- Sometimes
- Most of the time/all the time





Brands need to reinforce the link that the gut has on everyday well-being

Consumers do not always make the link between the gut and emotional wellness



21%

of global consumers associate good mood levels with having a positive impact on digestive health. 2024 (EMO509)

When buying products such as probiotics, consumers do not necessarily recognize the wider associated benefits.



27%

of global consumers associate good energy levels with having a positive impact on digestive health. 2024 (EMO210)

This is despite consumers using energy levels as a key indicator of their levels of digestive health.



24%

of global consumers associate low stress levels with having a positive impact on digestive health. 2024 (EMO634)

Brands can look to make the link between digestive health and structured sleeping patterns and mood.

This is something that can continue to make the gut aspirational at a time of changing health priorities.



Addressing energy levels should be a key area of focus for digestive health brands over the next twelve months

Consumers are worried about the implications of low energy levels

17%

of global consumers say they feel full of energy either most or all the time. 2024 (EMO280)

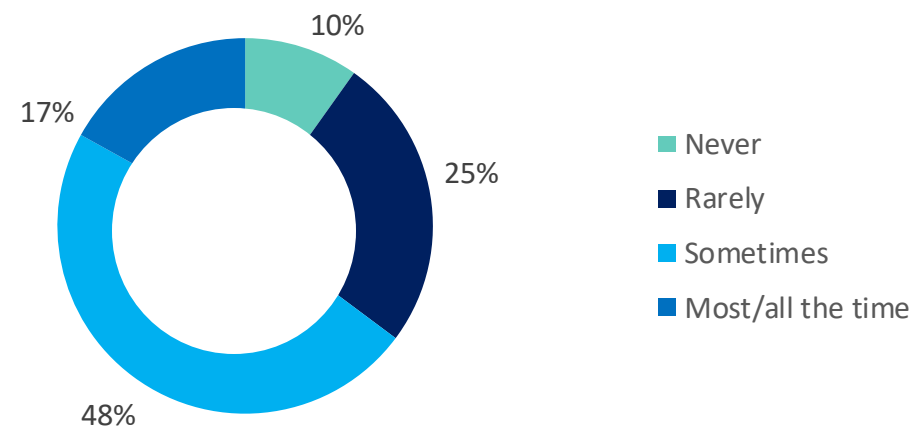


Consumers are prone to feeling fatigued and can be worried this reflects low health in general.

There is a high level of interest in food, drink, supplements, and ingredients that help aid the gut.

Do you worry that low energy levels may have a negative impact on your long-term health? 2024 (EMO592)

Global – Consumers who do not feel energized all the time



At the same time, consumers can be conscious about the safety of “traditional” energy boosting products.

Clean energy, and linking this to hydration, are key messages the industry must look to promote.



Weight loss is also a key area for the digestive health industry to address over the next twelve months

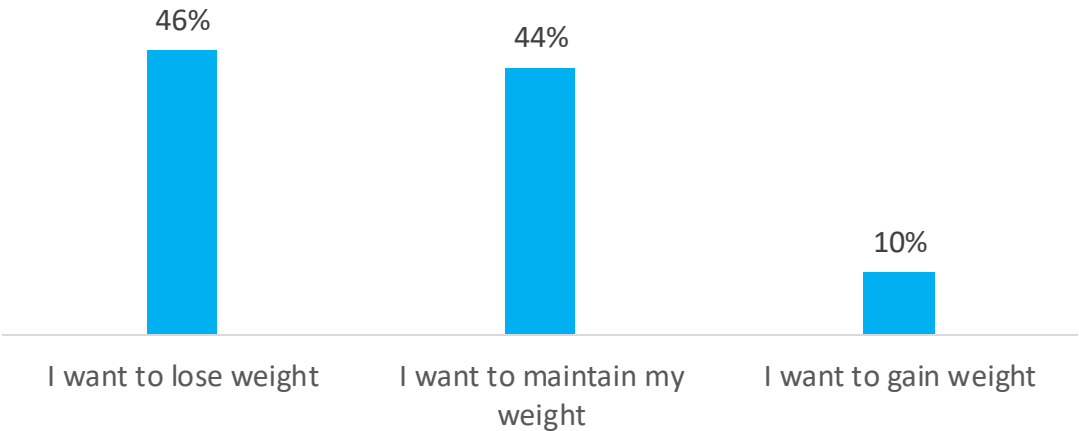
Consumers are worried about weight gain for various reasons



Consumers can be conscious that excessive weight can negatively impact the gut and bowel movement.

Issues such as time-scarcity, stress, and reduced financial confidence are leading to weight gain.

How would you describe your current attitude towards your weight?
2025 (WM567)
Global



Claims around natural energy, satiety enhancing, and controlled calorie intake will appeal to consumers.

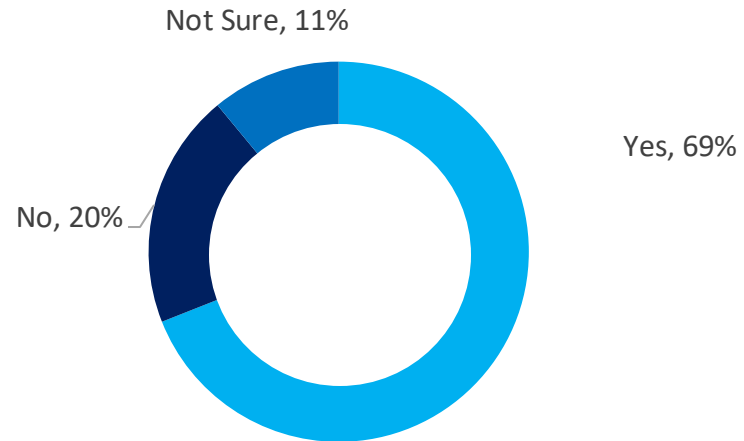
At the same time, it is important that any weight management products are deemed compromise-free.



Food and drink that stimulates GLP-1 hormones in a natural way appeal to consumers

This is seen as a healthier alternative to medication and drugs

Would you be interested in buying a food or beverage that stimulates your GLP-1 hormones in a natural way? 2025 (WLM681)



Whilst attitudes towards drugs and injections can be polarized, attitudes to food and drink is more favorable.

This is because drugs and injections can be associated with traits such as severe side-effects.

Consumers believe GLP-1 can change obesity rates but want reassurance it can do so in a safe manner.

The long-term future of the GLP-1 market will be determined by ethics and responsible distribution.



The growth in allergies and intolerances will place scrutiny on production methods by the food and drink industry

Approximately four in ten consumers deem themselves to have a food allergy or intolerance



The proportion of consumers who believe how food is processed/manufactured is something that causes food allergies/intolerance. 2024

Global

15%

Of consumers say they have a food allergy/intolerance. 2024 (AAI288)



35%

Of consumers say they do not have a food allergy/intolerance. 2024 (AAI406)

Although there could be some misdiagnosis, a high proportion of consumers feel they have an allergy or intolerance.

Consumers can feel that factors such as age, genetics, and digestive health can lead to allergies and intolerances.

However, some consumers are questioning the role that processed food is playing towards such rates.

Food allergies and intolerances and digestive health are a major concern for the parents of Generation Alpha.



Actions & Recommendations



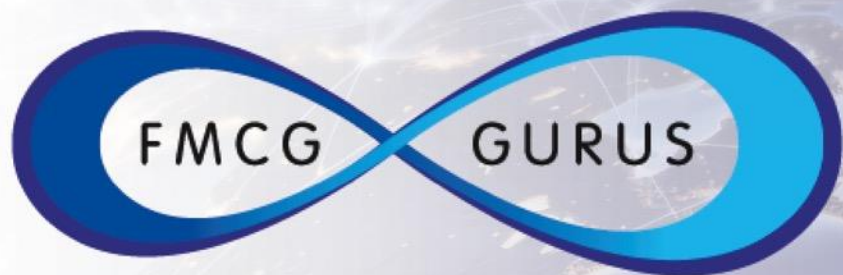
Awareness of the gut microbiome is growing, and consumers recognize the link with overall well-being. Despite this, the prevalence of gut-health problems continue to grow.

At the same time, consumers are giving digestive health less priority compared to a few years earlier, due to reduced fear of illness and changing priorities.

Clean energy (and hydration) are key messages for the gut health industry to reinforce at a time when many feel tired and fatigued and are worried about whether this indicates low health in general.

Weight management – particularly products that stimulate GLP-1 hormones in a natural way – are of high appeal, but it is crucial products are used responsibly.

The rise in food allergies and intolerances is something that will put greater scrutiny on product methods within the food and drink industry in the long-term.



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