



Consumer Insights on Gut Health & Probiotics

April 2022

Methodology

One thousand interviews were conducted among adults ages 18+ from March 4 to March 9, 2022 and were weighted to ensure proportional results.

The Bayesian confidence level for 1,000 interviews is 3.5, which is roughly equivalent to a margin of error ± 3.1 at the 95% confidence level.

Statistical Significance

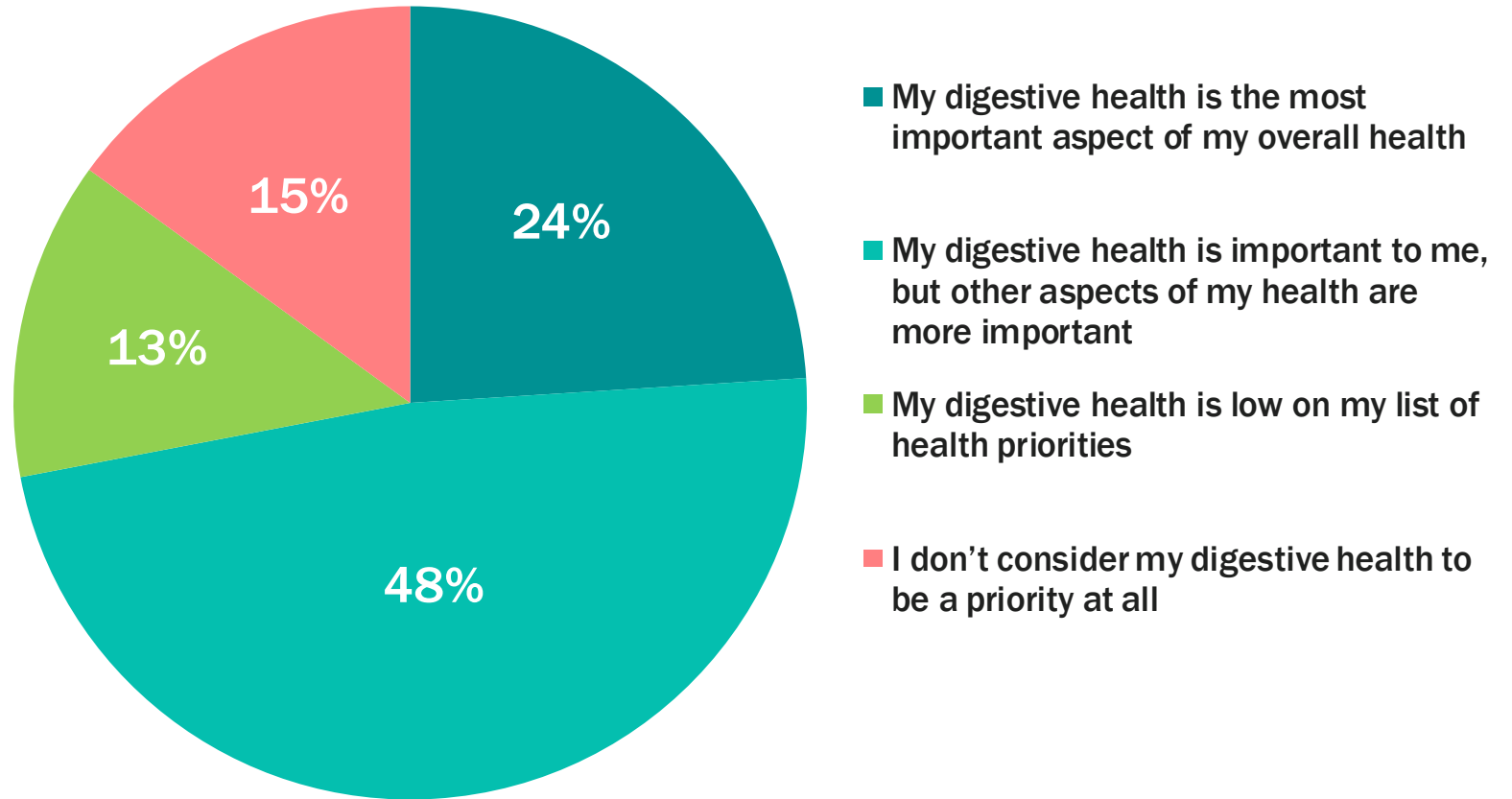
Something is statistically significant if the result cannot be attributed to random chance. Statistical significance in this presentation should be compared within each demographic (e.g. age, race, gender, etc.).

For example, if the responses from female respondents is considered to be significant, it is in relation to male respondents and not necessarily other demographic groups.



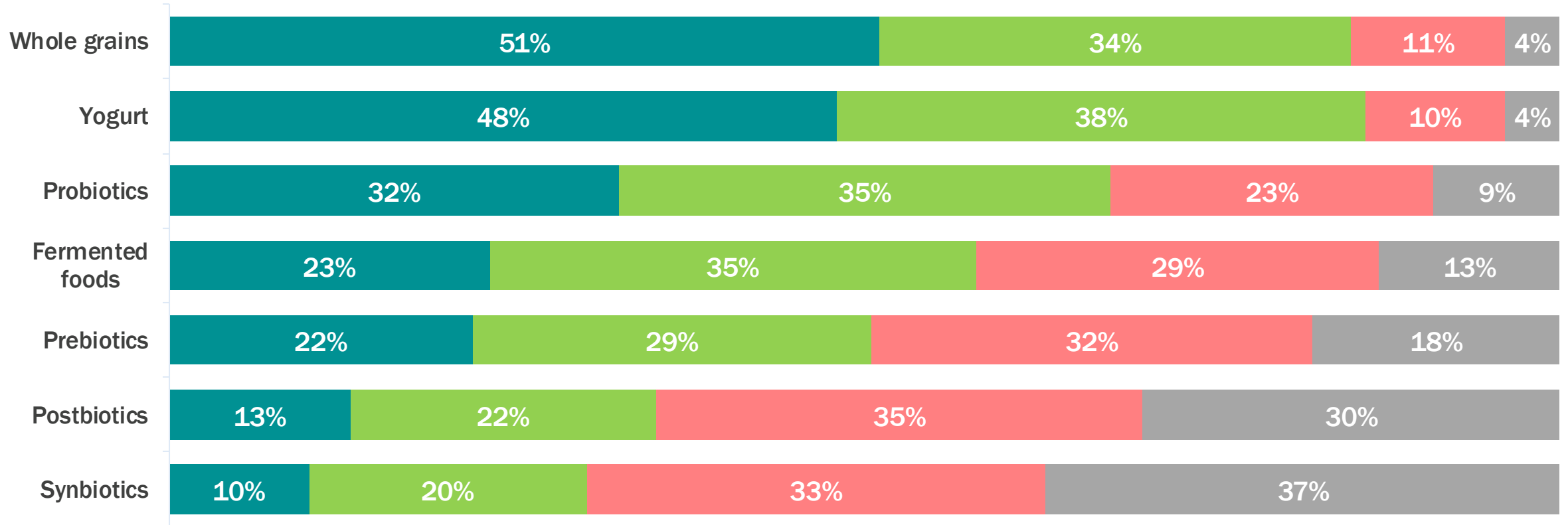
Nearly 1 in 4 say digestive health is the most important aspect of their overall health

People under age 45, those making >\$80K/year and people with a college degree were more likely to say that digestive health is most important.



When thinking about your overall health, to what extent do you prioritize your gut health? n=1001

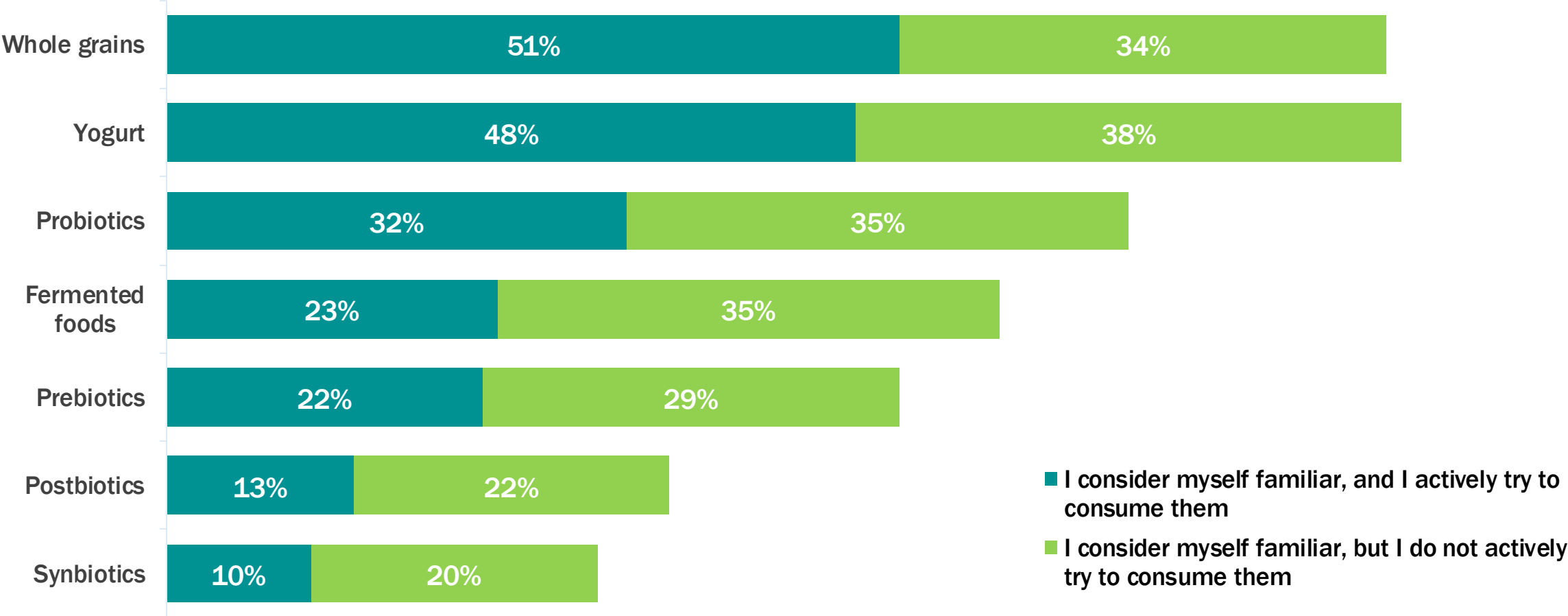
Over half consider themselves familiar with probiotics; fewer are familiar with postbiotics and synbiotics



- I consider myself familiar, and I actively try to consume them
- I consider myself familiar, but I do not actively try to consume them
- I do not consider myself familiar
- I have never heard of this before

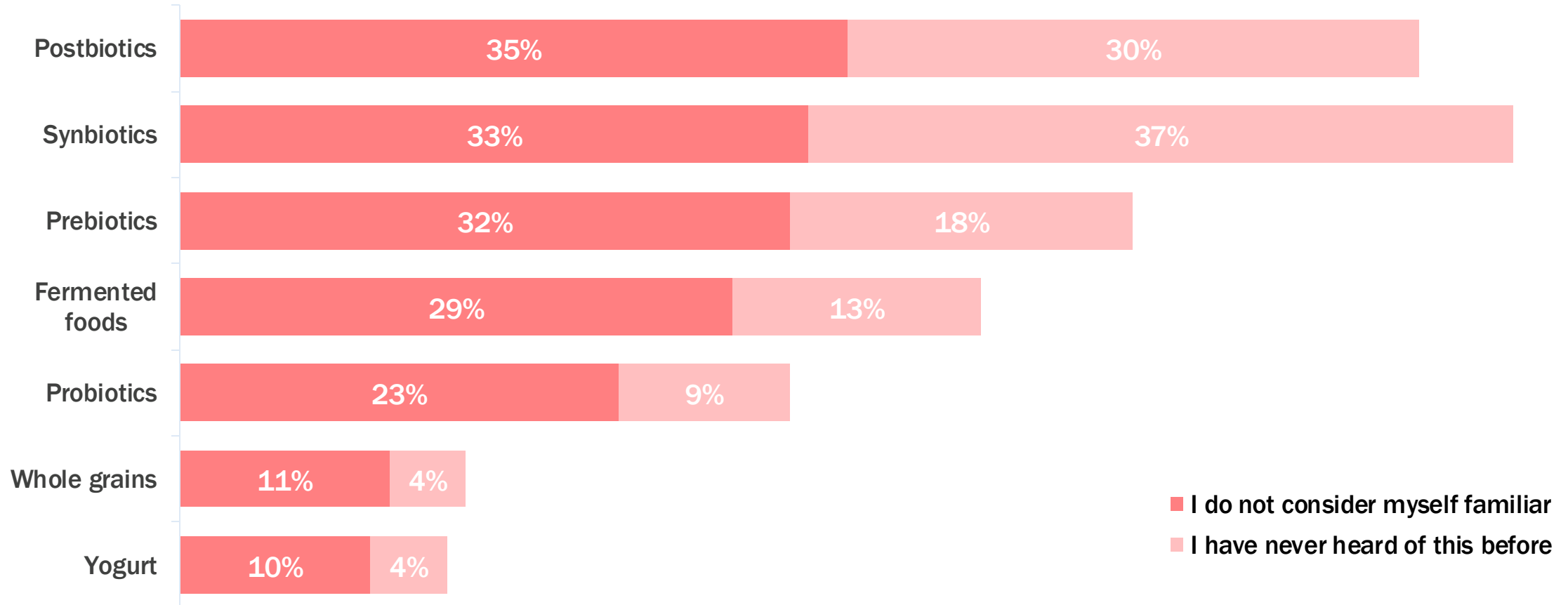
When thinking about the options below, which of the following best describes your familiarity and consumption habits? n=1001

Most people are familiar with probiotics; 1 in 3 actively try to consume them



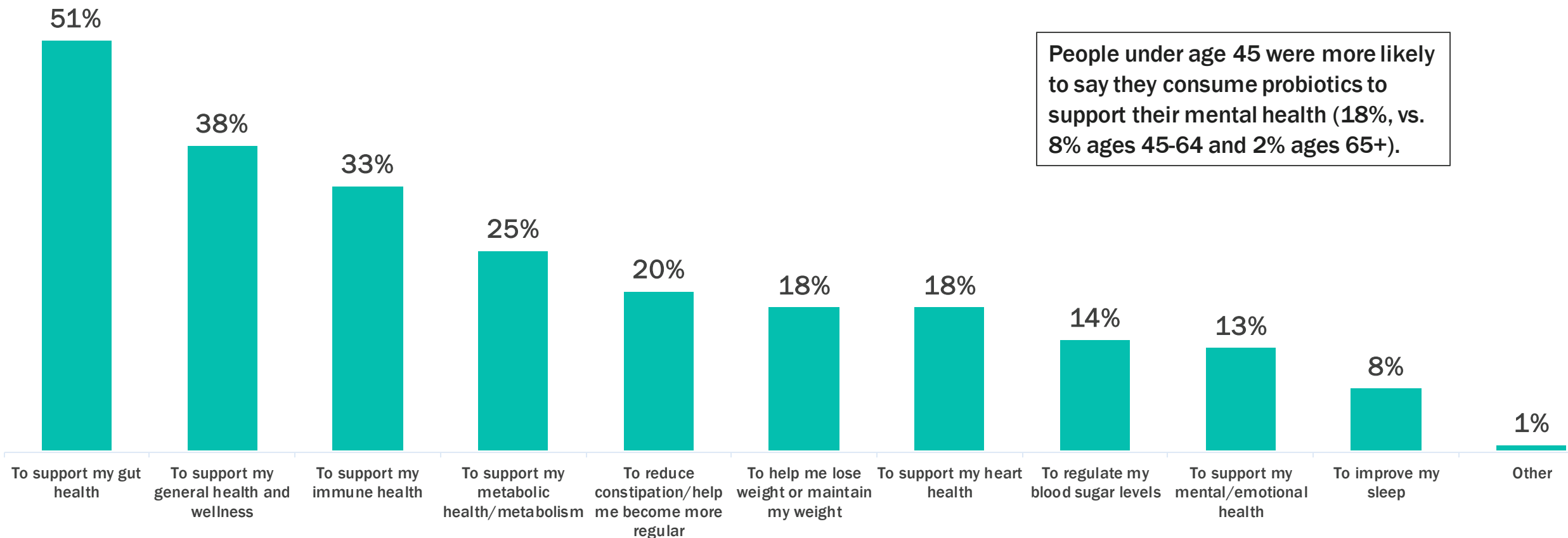
When thinking about the options below, which of the following best describes your familiarity and consumption habits? n=1001

Familiarity with postbiotics and synbiotics is low; relatively even split on familiarity with prebiotics



When thinking about the options below, which of the following best describes your familiarity and consumption habits? n=1001

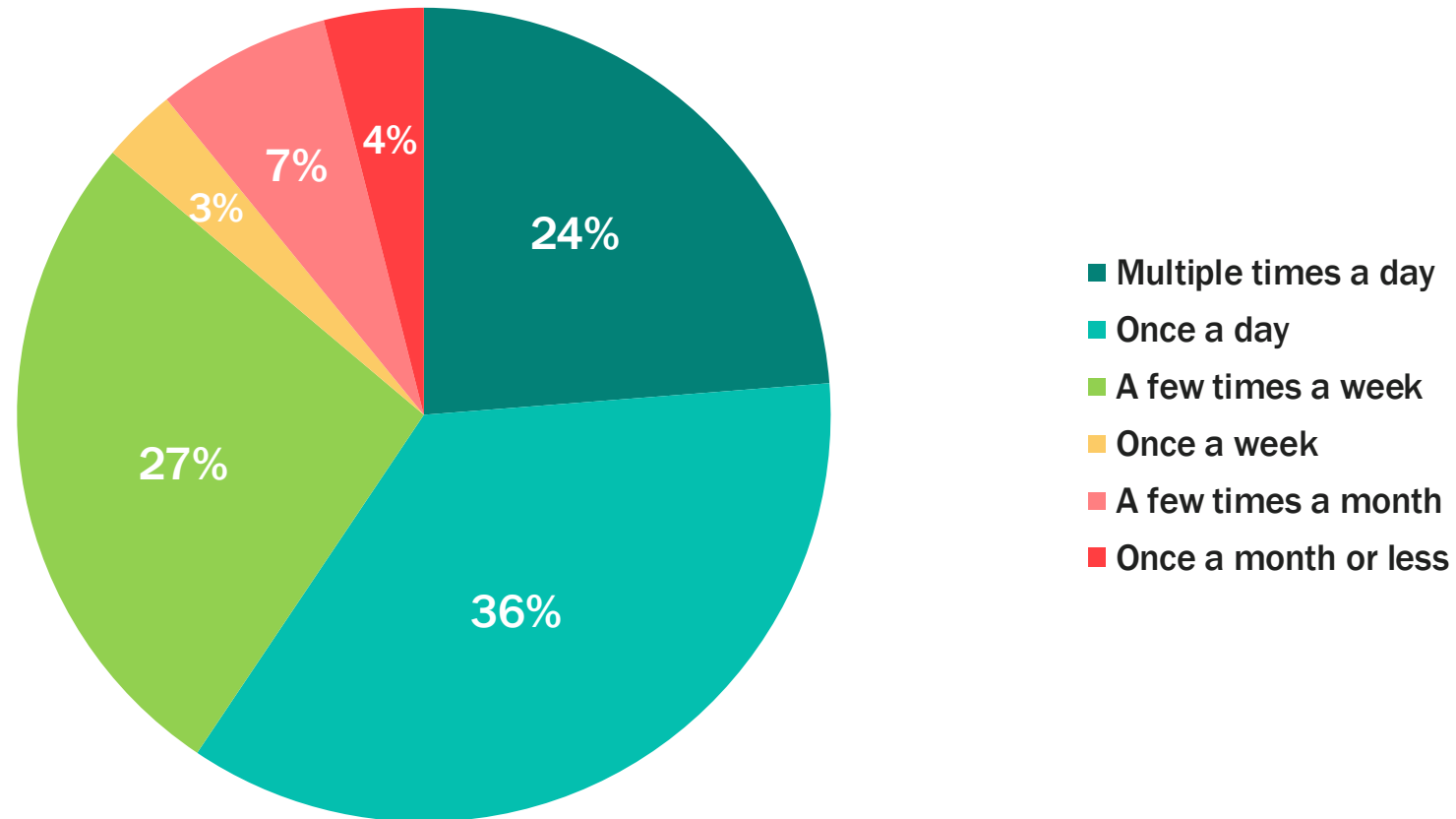
Supporting gut health, general health and wellness and immune health are top reasons for consuming probiotics



People under age 45 were more likely to say they consume probiotics to support their mental health (18%, vs. 8% ages 45-64 and 2% ages 65+).

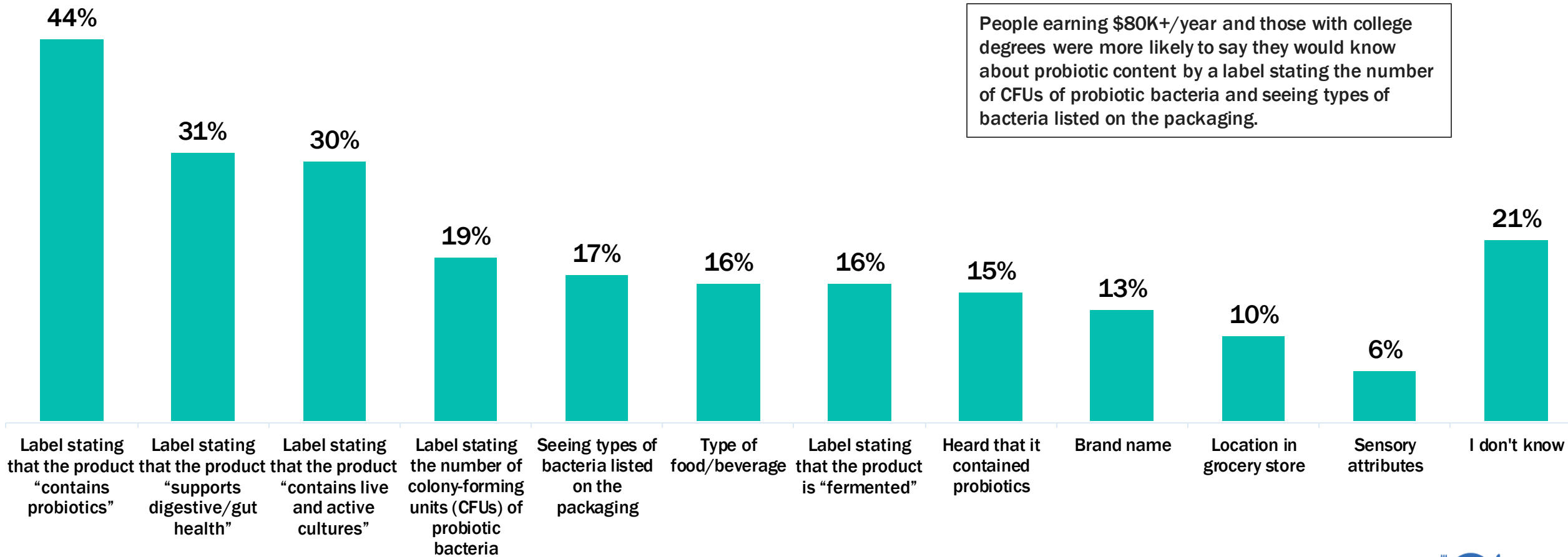
[If consider self familiar and actively try to consume probiotics] Why do you try to consume probiotics? Select up to three reasons. n=330

Of those who try to consume probiotics, 3 in 5 do so at least once a day



[If consider self familiar and actively try to consume probiotics] How often do you try to consume foods, beverages and/or supplements with probiotics? n=330

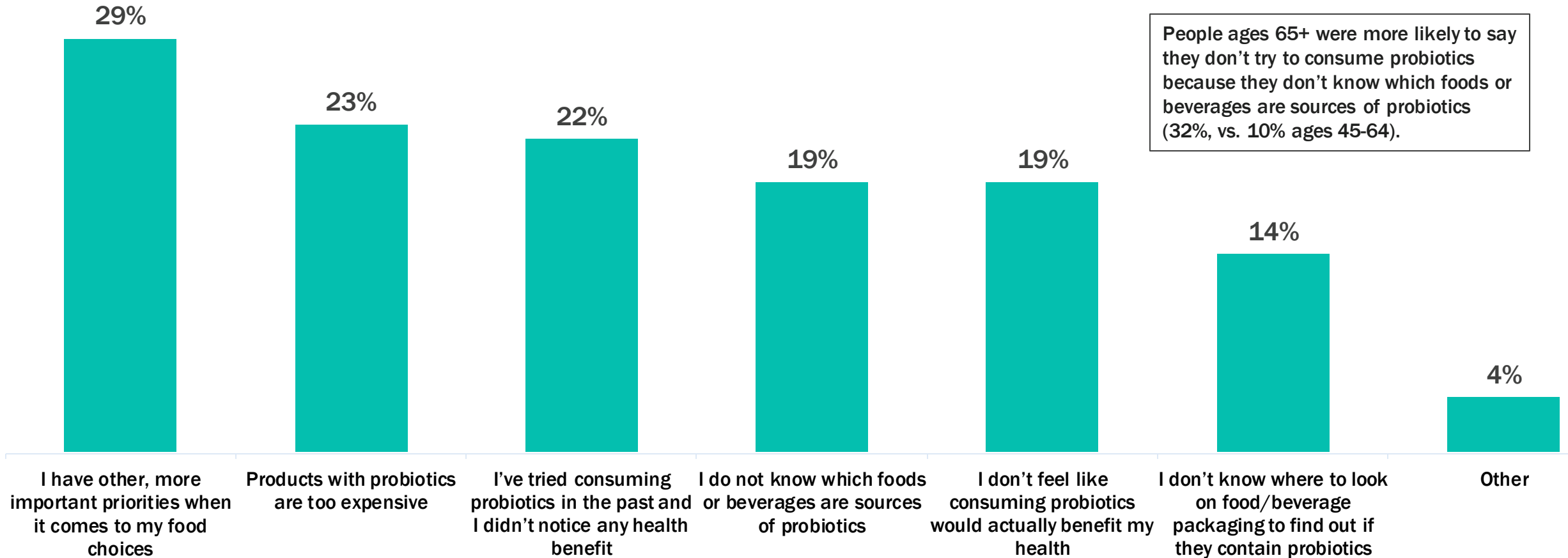
Consumers would most commonly know if a product contains probiotics based on specific product labels



People earning \$80K+/year and those with college degrees were more likely to say they would know about probiotic content by a label stating the number of CFUs of probiotic bacteria and seeing types of bacteria listed on the packaging.

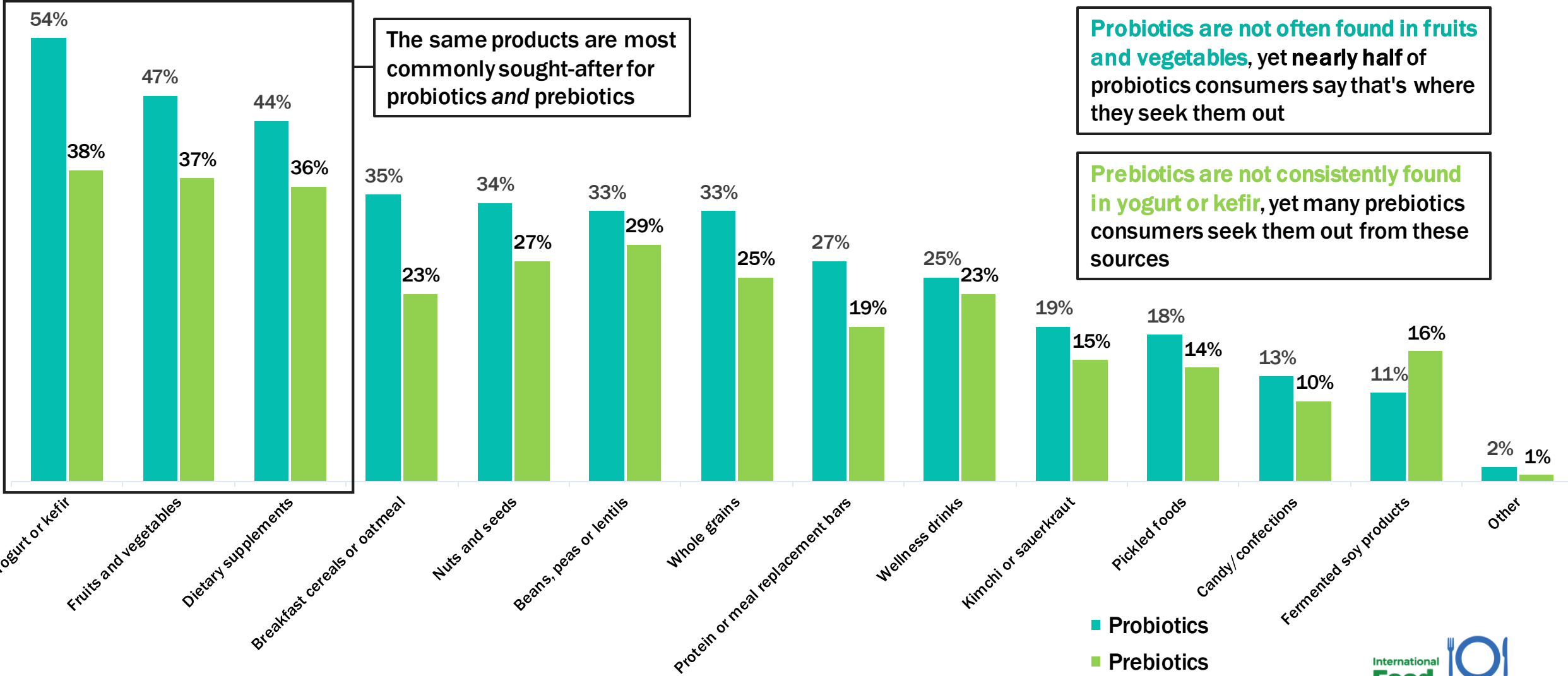
How would you know if a food or beverage contains probiotics? Select all that apply. n=1001

Of those who are familiar with but don't try to consume probiotics, about three in 10 say this is because they have other food priorities



[If consider self familiar, but do not actively try to consume probiotics in Q2] You mentioned that you do not actively try to consume probiotics. Why not? n=359

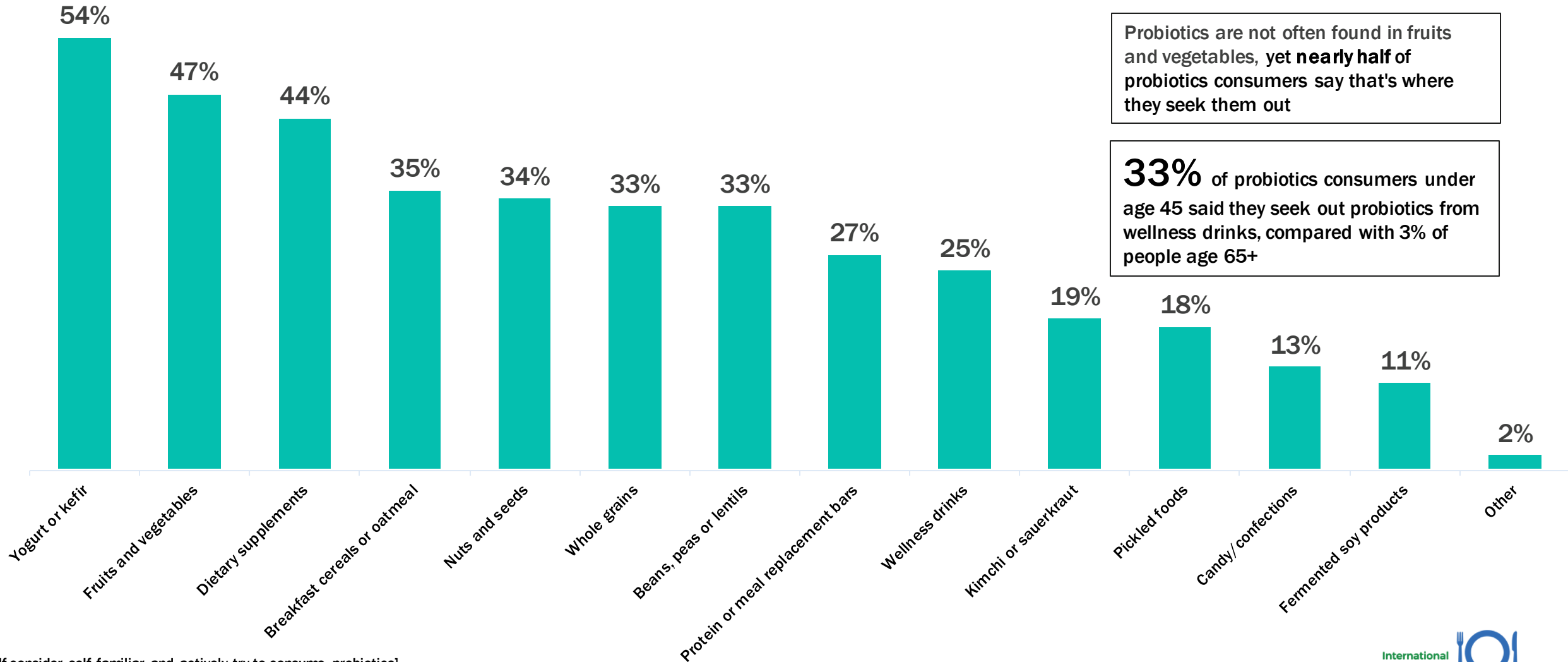
Consumers turn to the same top sources for probiotics and prebiotics



[If consider self familiar and actively try to consume probiotics] You mentioned that you actively try to consume probiotics. Where do you most commonly seek them out? Select all that apply. n=330 (probiotics), n=214 (prebiotics)



Those who try to consume probiotics most commonly seek them out in yogurt or kefir, fruits and vegetables and supplements

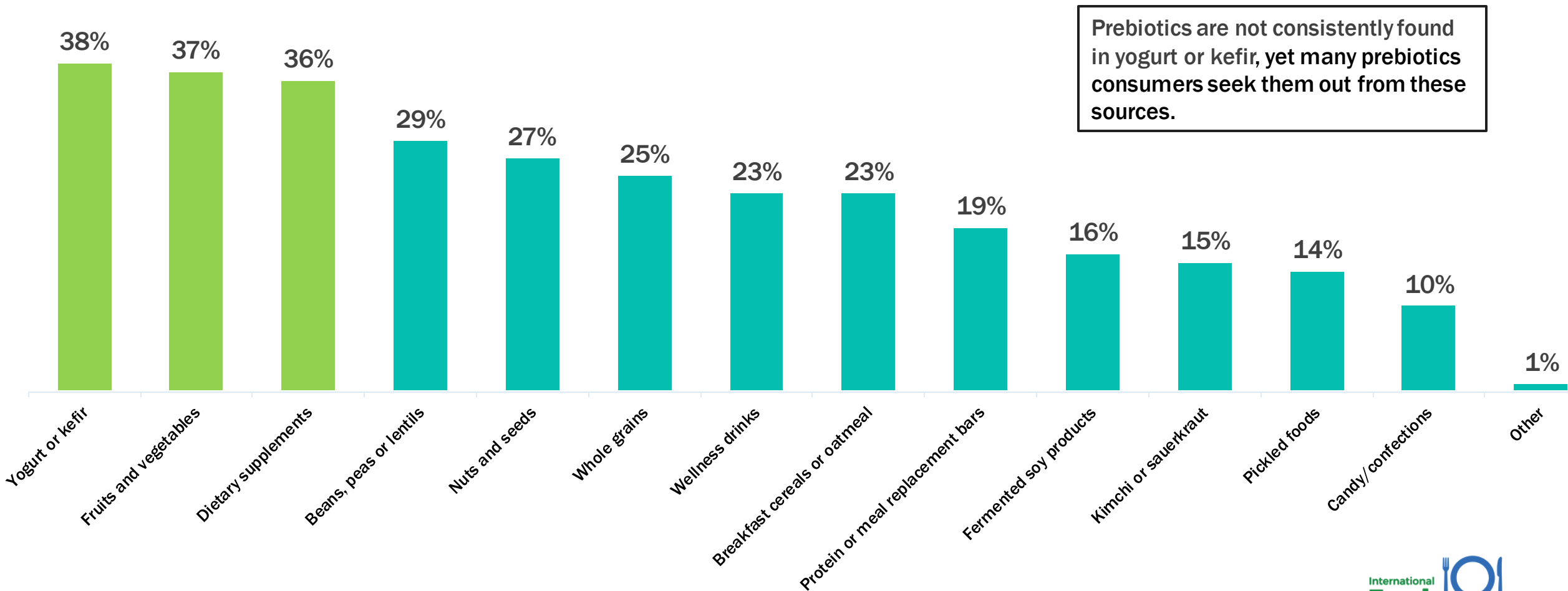


Probiotics are not often found in fruits and vegetables, yet **nearly half** of probiotics consumers say that's where they seek them out

33% of probiotics consumers under age 45 said they seek out probiotics from wellness drinks, compared with 3% of people age 65+

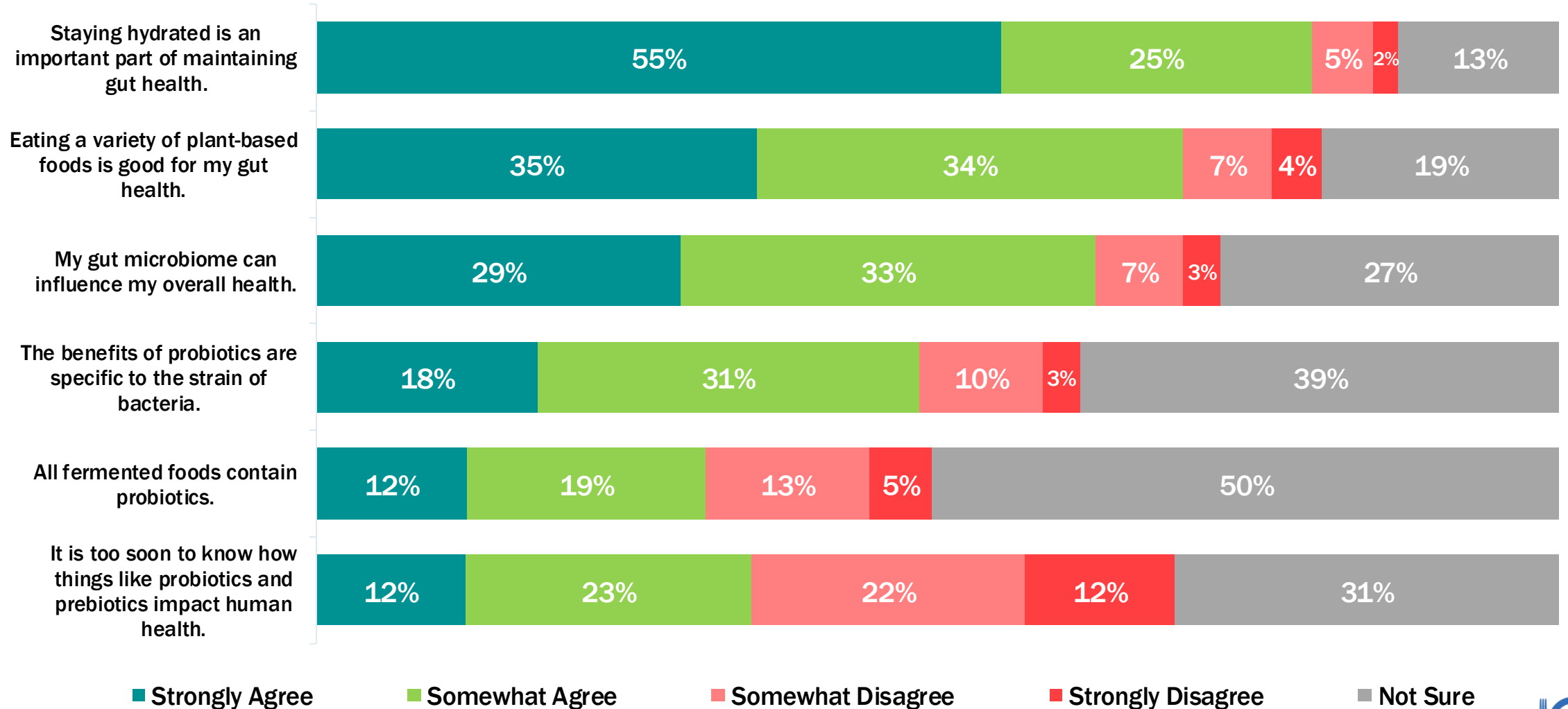
[If consider self familiar and actively try to consume probiotics]
You mentioned that you actively try to consume probiotics.
Where do you most commonly seek them out? Select all that apply. n=330

Those who try to consume prebiotics most commonly seek them out in yogurt or kefir, fruits and vegetables and supplements



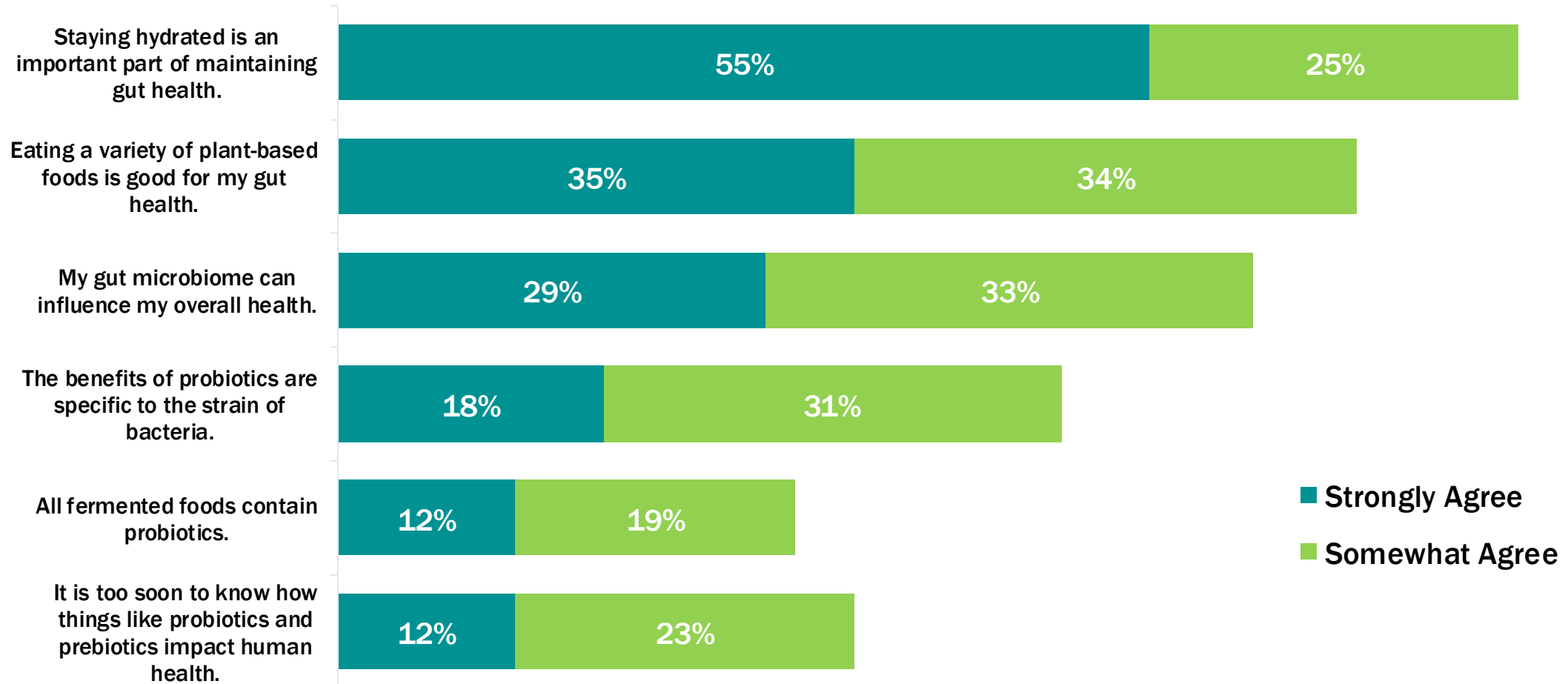
[If consider self familiar and I actively try to consume prebiotics in Q2] Where do you most commonly seek out prebiotics? Select all that apply. n=214

Most agree that hydration and plant-based foods are beneficial to gut health, while many aren't sure about specifics related to probiotics



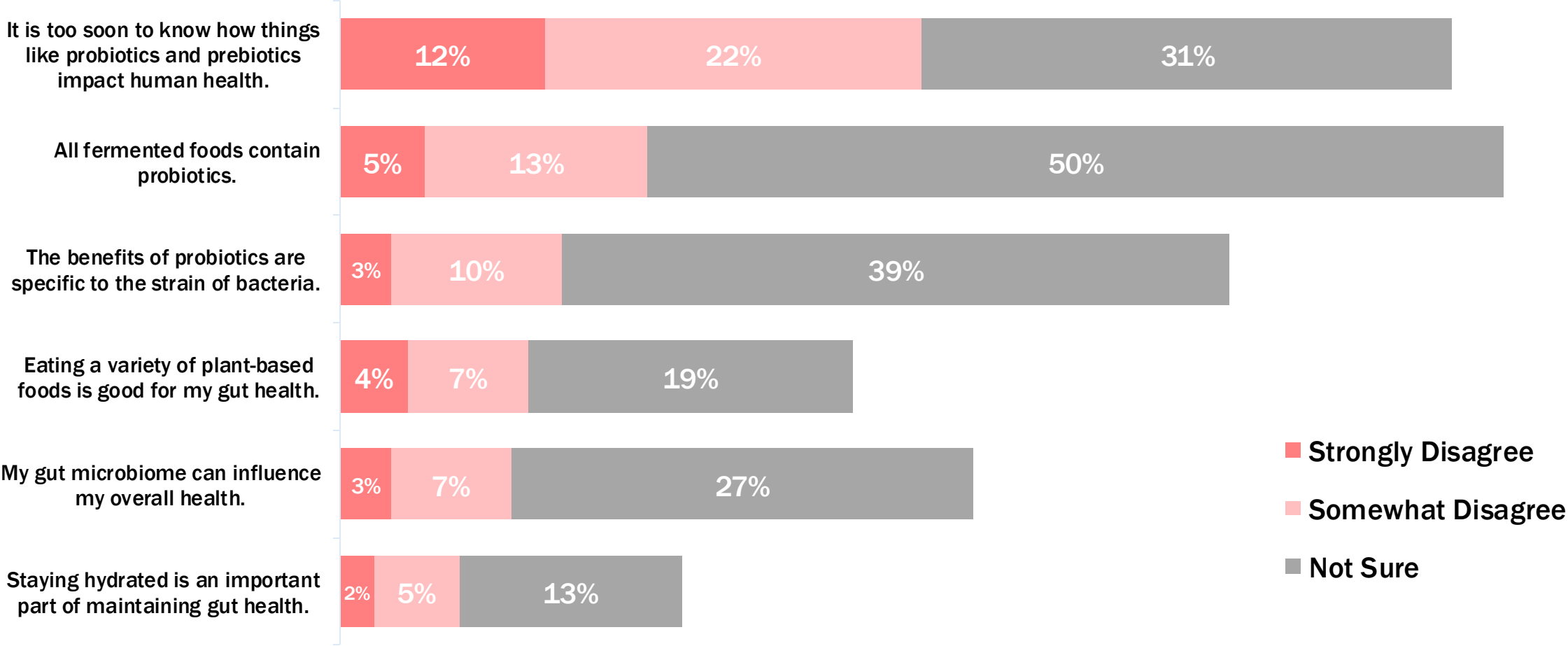
Please state your level of agreement with each of the following statements. n=1001

Most people agree that hydration and plant-based foods are beneficial to gut health, and that the gut microbiome can influence overall health



Please state your level of agreement with each of the following statements. n=1001

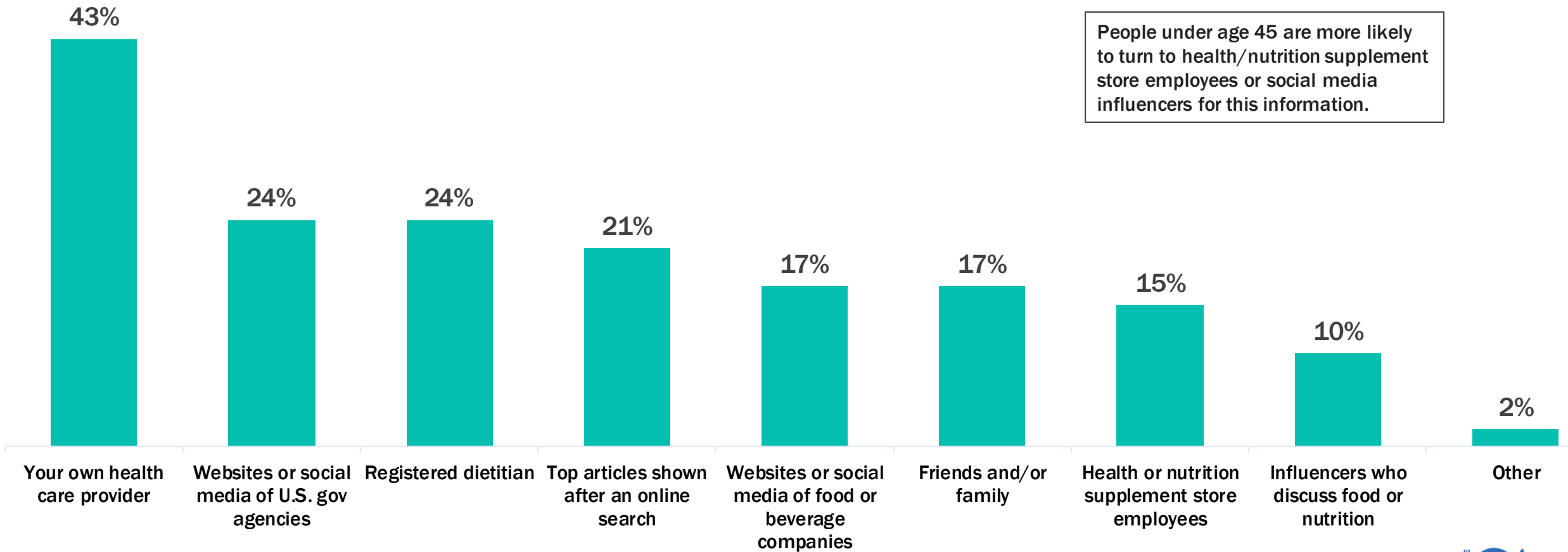
There is a higher degree of uncertainty about probiotics issues like strain-specificity and their association with fermented foods



Please state your level of agreement with each of the following statements. n=1001



People are most likely to turn to health care providers to learn more about prebiotics, probiotics, postbiotics and/or synbiotics



People under age 45 are more likely to turn to health/nutrition supplement store employees or social media influencers for this information.

If you wanted to learn more about prebiotics, probiotics, postbiotics and/or synbiotics, which information sources would you be most likely to use? Select your top 2 options. n=1001

Appendix

When thinking about your overall health, to what extent do you prioritize your gut health?

	My digestive health is the most important aspect of my overall health	My digestive health is important to me, but other aspects of my health are more important	My digestive health is low on my list of health priorities	I don't consider my digestive health to be a priority at all
Total	24%	48%	13%	15%
Men	24%	45%	13%	18%
Women	23%	50%	14%	13%
Less than \$40K	21%	44%	16%	19% ↑
\$40K-\$79K	22%	53%	11%	14%
\$80K+	32% ↑	50%	9%	10% ↓
White	20% ↓	49%	14%	16%
African American	30%	42%	11%	17%
Hispanic/ Latinx	28%	48%	13%	11%
Under 45	32% ↑	44%	13%	12%
45-64	19%	52%	12%	17%
65+	13% ↓	50%	16%	21%
Non-college	21% ↓	45%	15%	19% ↑
College	29% ↑	54%	9%	7% ↓

When thinking about the options below, which of the following best describes your familiarity and consumption habits?

% I consider myself familiar and actively try to consume them

	Whole grains	Yogurt	Probiotics	Fermented foods	Prebiotics	Postbiotics	Synbiotics
Total	51%	48%	32%	23%	22%	13%	10%
Men	48%	40% ↓	28%	24%	19%	15%	12%
Women	54%	55% ↑	37%	22%	24%	12%	8%
Less than \$40K	48%	45%	27% ↓	18% ↓	18%	11%	7%
\$40K-\$79K	52%	49%	38%	24%	22%	12%	9%
\$80K+	56%	53%	38%	32% ↑	30% ↑	21% ↑	18% ↑
White	50%	45%	30%	22%	20%	12%	8% ↓
African American	51%	47%	37%	24%	24%	22% ↑	16%
Hispanic/ Latinx	56%	53%	35%	24%	28%	15%	16%
Under 45	50%	52%	37%	27%	29% ↑	19% ↑	17% ↑
45-64	53%	50%	33%	21%	19%	10%	5% ↓
65+	50%	33% ↓	20% ↓	20%	9% ↓	6% ↓	3% ↓
Non-college	50%	44% ↓	30%	21%	20%	11%	8% ↓
College	53%	54% ↑	37%	27%	25%	17%	14% ↑

When thinking about the options below, which of the following best describes your familiarity and consumption habits?

	Whole grains	Yogurt	Probiotics	Fermented foods	Prebiotics	Postbiotics	Synbiotics
Total	51%	48%	32%	23%	22%	13%	10%
My digestive health is the most important aspect of my overall health	62% ↑	62% ↑	51% ↑	38% ↑	43% ↑	31% ↑	25% ↑
My digestive health is important to me, but other aspects of my health are more important	55%	49%	34%	19%	18%	9% ↓	6% ↓
My digestive health is low on my list of health priorities	42%	39%	13% ↓	20%	9% ↓	5% ↓	3%
I don't consider my digestive health to be a priority at all	28% ↓	28% ↓	16% ↓	15%	8% ↓	8%	5%

[If consider self familiar and actively try to consume probiotics] You mentioned that you actively try to consume probiotics. Where do you most commonly seek them out? Select all that apply.

	Yogurt or kefir	Fruits and vegetables	Dietary supplements	Cereals or oatmeal	Nuts and seeds	Whole grains	Beans, peas, or lentils
Total	54%	47%	44%	35%	34%	33%	33%
Men	49%	45%	40%	32%	41%	36%	39%
Women	58%	49%	46%	37%	29%	31%	28%
Less than \$40K	50%	54%	36%	40%	32%	38%	34%
\$40K-\$79K	57%	51%	46%	37%	32%	30%	31%
\$80K+	54%	33% ↓	50%	28%	37%	32%	33%
White	55%	42%	44%	33%	31%	31%	30%
African American	50%	53%	36%	38%	30%	41%	28%
Hispanic/ Latinx	48%	58%	44%	36%	45%	37%	42%
Under 45	56%	51%	42%	38%	34%	33%	29%
45-64	53%	42%	46%	24%	34%	32%	35%
65+	49%	46%	46%	51%	33%	36%	44%
Non-college	52%	49%	42%	36%	32%	32%	29%
College	57%	45%	46%	32%	38%	34%	39%

[If consider self familiar and actively try to consume probiotics] You mentioned that you actively try to consume probiotics. Where do you most commonly seek them out? Select all that apply.

	Wellness drinks	Kimchi or sauerkraut	Pickled foods	Candy/confections	Fermented soy products	Other
Total	25%	19%	18%	13%	11%	2%
Men	24%	23%	19%	16%	10%	2%
Women	25%	17%	17%	12%	11%	2%
Less than \$40K	18%	18%	20%	17%	4%	3%
\$40K-\$79K	27%	21%	18%	10%	13%	1%
\$80K+	32%	20%	15%	15%	16%	1%
White	23%	16%	16%	10%	8%	1%
African American	27%	27%	18%	21%	18%	4%
Hispanic/ Latinx	27%	21%	20%	18%	9%	2%
Under 45	33% ↑	20%	21%	18%	15%	1%
45-64	22%	18%	11%	10%	7%	2%
65+	3% ↓	21%	25%	4%	4%	7% ↑
Non-college	22%	20%	19%	12%	10%	1%
College	30%	19%	16%	16%	12%	4%

[If consider self familiar and actively try to consume probiotics] Why do you try to consume probiotics? Select up to three reasons.

	To support my gut health	To support my general health and wellness	To support my immune health	To support my metabolism	To reduce constipation	To help me lose or maintain weight	To support my heart health	To regular my blood sugar	To support my mental health	To improve my sleep	Other
Total	51%	38%	33%	25%	20%	18%	18%	14%	13%	8%	1%
Men	45%	37%	34%	25%	19%	25%	20%	20%	12%	9%	0%
Women	55%	39%	33%	24%	21%	13%	17%	10%	13%	7%	2%
Less than \$40K	52%	37%	33%	24%	23%	18%	20%	13%	13%	6%	1%
\$40K-\$79K	53%	35%	33%	22%	20%	18%	17%	18%	14%	5%	1%
\$80K+	44%	45%	34%	27%	18%	18%	19%	12%	12%	14%	3%
White	57%	40%	35%	20%	22%	13%	16%	13%	11%	6%	2%
African American	47%	33%	38%	35%	19%	24%	26%	19%	12%	8%	0%
Hispanic/Latinx	37%	36%	30%	30%	8%	32% ↑	15%	17%	19%	13%	0%
Under 45	39% ↓	33%	32%	28%	16%	22%	20%	15%	18% ↑	9%	1%
45-64	64% ↑	43%	36%	22%	22%	13%	16%	13%	8%	7%	1%
65+	60%	46%	31%	16%	30%	16%	16%	14%	2%	4%	2%
Non-college	53%	39%	33%	21%	20%	18%	21%	15%	11%	7%	1%
College	47%	37%	35%	31%	20%	18%	13%	14%	16%	9%	2%

[If consider self familiar and actively try to consume probiotics] How often do you try to consume foods, beverages and/or supplements with probiotics

	Multiple times a day	Once a day	A few times a week	Once a week	A few times a month	Once a month or less
Total	24%	36%	27%	3%	7%	4%
Men	29%	37%	26%	3%	3%	2%
Women	20%	35%	27%	2%	9%	6%
Less than \$40K	18%	36%	27%	5%	10%	3%
\$40K-\$79K	25%	37%	27%	0%	6%	5%
\$80K+	31%	35%	25%	4%	2%	3%
White	19%	39%	26%	2%	8%	5%
African American	27%	41%	22%	2%	5%	3%
Hispanic/ Latinx	37%	32%	18%	2%	7%	3%
Under 45	30% ↑	35%	24%	3%	6%	2%
45-64	17%	33%	30%	3%	10%	7%
65+	15%	51%	30%	0%	0%	5%
Non-college	25%	32%	30%	2%	7%	4%
College	22%	44%	21%	3%	5%	5%

How would you know if a food or beverage contains probiotics? Select all that apply.

	Label stating the product “Contains probiotics”	Label stating that the product “supports digestive/gut health”	Label stating that the product “contains live and active cultures”	Label stating the number of colony-forming units of probiotic bacteria	Seeing types of bacteria listed on the packaging	Type of food/beverage	Label stating that the product is “fermented”	Heard that it contained probiotics	Brand name	Location in grocery store	Sensory attributes	I don't know
Total	44%	31%	30%	19%	17%	16%	16%	15%	13%	10%	6%	21%
Men	42%	28%	27%	18%	19%	16%	15%	16%	13%	11%	8% ↑	23%
Women	47%	34%	32%	19%	15%	16%	16%	14%	13%	9%	3% ↓	19%
Less than \$40K	43%	30%	28%	13% ↓	13% ↓	13%	15%	15%	11%	9%	4%	25% ↑
\$40K-\$79K	47%	34%	31%	21%	17%	20%	15%	10% ↓	12%	8%	5%	17%
\$80K+	46%	32%	34%	26% ↑	23% ↑	19%	17%	22% ↑	17%	16% ↑	10% ↑	14%
White	48%	32%	31%	18%	17%	17%	15%	14%	10% ↓	10%	5%	22%
African American	36%	30%	24%	14%	22%	17%	19%	18%	22% ↑	14%	9%	21%
Hispanic/Latinx	43%	30%	28%	22%	16%	15%	15%	13%	16%	10%	4%	15%
Under 45	35% ↓	29%	27%	20%	20%	16%	19%	17%	17% ↑	13% ↑	9% ↑	17%
45-64	52% ↑	34%	32%	17%	15%	17%	14%	16%	13%	9%	3%	21%
65+	53% ↑	33%	31%	20%	12%	14%	11%	9% ↓	4% ↓	5% ↓	2% ↓	28% ↑
Non-college	42%	28% ↓	26% ↓	16% ↓	14% ↓	14%	14%	13%	11%	10%	4% ↓	25% ↑
College	49%	38% ↑	36% ↑	24% ↑	23% ↑	19%	19%	19%	16%	10%	10% ↑	13% ↓

[If consider self familiar, but do not actively try to consume probiotics in Q2] You mentioned that you do not actively try to consume probiotics. Why not?

	I have other, more important priorities when it comes to my food choices	Products with probiotics are too expensive	I've tried consuming probiotics in the past and I didn't notice any health benefit	I do not know which foods or beverages are sources of probiotics	I don't feel like consuming probiotics would actually benefit my health	I don't know where to look on food/beverage packaging to find out if they contain probiotics	Other
Total	29%	23%	22%	19%	19%	14%	4%
Men	33%	19%	20%	23%	21%	20%	4%
Women	26%	26%	23%	16%	18%	9%	5%
Less than \$40K	29%	21%	21%	16%	21%	15%	6%
\$40K-\$79K	24%	21%	26%	19%	20%	10%	5%
\$80K+	38%	29%	24%	24%	18%	13%	1%
White	32%	21%	23%	22%	21%	12%	4%
African American	37%	25%	10%	23%	13%	16%	4%
Hispanic/ Latinx	12%	30%	26%	10%	21%	20%	4%
Under 45	24%	27%	23%	20%	20%	16%	2%
45-64	35%	23%	21%	10% ↓	17%	16%	8%
65+	31%	14%	22%	32% ↑	22%	6%	3%
Non-college	25%	19%	20%	18%	20%	16%	6%
College	36%	28%	25%	20%	18%	11%	2%

[If consider self familiar and I actively try to consume prebiotics in Q2] Where do you most commonly seek out prebiotics? Select all that apply.

	Yogurt or kefir	Fruits and vegetables	Dietary supplements	Beans, peas, or lentils	Nuts and seeds	Whole grains	Wellness drinks
Total	38%	37%	36%	29%	27%	25%	23%
Men	37%	38%	39%	34%	32%	30%	23%
Women	39%	36%	33%	25%	23%	21%	22%
Less than \$40K	39%	38%	31%	29%	28%	29%	12%
\$40K-\$79K	39%	33%	42%	25%	27%	22%	22%
\$80K+	36%	41%	36%	34%	25%	25%	36% ↑
White	41%	41%	39%	30%	27%	24%	23%
African American	40%	35%	34%	37%	34%	34%	27%
Hispanic/ Latinx	33%	22%	29%	21%	22%	22%	18%
Under 45	34%	35%	33%	22%	22%	21%	26%
45-64	47%	38%	43%	35%	31%	28%	14%
65+	44%	48%	34%	59% ↑	52%	43%	25%
Non-college	44%	36%	32%	29%	26%	28%	20%
College	30%	38%	43%	29%	29%	20%	28%

[If consider self familiar and I actively try to consume prebiotics in Q2] Where do you most commonly seek out prebiotics? Select all that apply.

	Cereals or oatmeal	Protein or meal replacement bars	Fermented soy products	Kimchi or sauerkraut	Pickled foods	Candy/ confections	Other
Total	23%	19%	16%	15%	14%	10%	1%
Men	30%	21%	17%	15%	13%	10%	0%
Women	18%	18%	15%	15%	16%	10%	1%
Less than \$40K	32%	18%	11%	8%	11%	10%	2%
\$40K-\$79K	25%	17%	16%	9%	12%	9%	0%
\$80K+	15%	24%	21%	25% ↑	20%	13%	0%
White	18%	19%	10%	10%	10%	10%	0%
African American	48% ↑	27%	26%	22%	28%	12%	0%
Hispanic/ Latinx	22%	12%	19%	22%	15%	9%	0%
Under 45	22%	22%	19%	16%	16%	13%	0%
45-64	21%	17%	11%	11%	9%	7%	2%
65+	35%	3%	12%	17%	20%	0%	0%
Non-college	29%	18%	16%	13%	14%	10%	1%
College	13%	22%	17%	17%	16%	11%	0%

Please state your level of agreement with each of the following statements. % *Strongly agree*

	Staying hydrated is an important part of maintaining gut health.	Eating a variety of plant-based foods is good for my gut health.	My gut microbiome can influence my overall health.	The benefits of probiotics are specific to the strain of bacteria.	All fermented foods contain probiotics.	It is too soon to know how things like probiotics and prebiotics impact human health.
Total	55%	35%	29%	18%	12%	12%
Men	51%	34%	27%	18%	12%	14%
Women	60%	36%	32%	18%	13%	11%
Less than \$40K	52%	33%	24% ↓	16%	9%	9%
\$40K-\$79K	62%	36%	31%	17%	14%	12%
\$80K+	56%	40%	40% ↑	23%	17%	19% ↑
White	57%	34%	29%	15% ↓	9% ↓	11%
African American	50%	38%	29%	26%	21% ↑	14%
Hispanic/ Latinx	58%	39%	32%	22%	18%	16%
Under 45	53%	40% ↑	34%	25% ↑	18% ↑	18% ↑
45-64	58%	32%	28%	14%	9%	7% ↓
65+	57%	29%	22% ↓	8% ↓	5% ↓	6% ↓
Non-college	53%	30% ↓	26% ↓	16%	11%	12%
College	60%	44% ↑	37% ↑	22%	15%	13%

If you wanted to learn more about prebiotics, probiotics, postbiotics and/or synbiotics, which information sources would you be most likely to use? Select your top 2 options

	Your own health care provider	Websites or social media accounts of U.S. government agencies	Registered dietitian	Top articles shown after an online search	Websites or social media accounts of food or beverage companies	Friends and/or family	Health or nutrition supplement store employees	Social media influencers/bloggers who discuss food or nutrition	Other
Total	43%	24%	24%	21%	17%	17%	15%	10%	2%
Men	44%	23%	25%	18%	17%	16%	16%	10%	2%
Women	43%	25%	23%	23%	17%	17%	14%	9%	2%
Less than \$40K	42%	26%	21%	16% ↓	20%	18%	12%	7%	3%
\$40K-\$79K	47%	25%	22%	24%	15%	18%	17%	11%	2%
\$80K+	41%	20%	34% ↑	23%	14%	16%	19%	13%	1%
White	45%	28% ↑	25%	19%	17%	16%	15%	7% ↓	2%
African American	37%	19%	22%	24%	22%	19%	12%	16%	3%
Hispanic/ Latinx	41%	21%	21%	22%	15%	19%	16%	15%	0%
Under 45	35% ↓	19% ↓	25%	20%	19%	19%	20% ↑	17% ↑	1%
45-64	48%	27%	22%	22%	18%	15%	13%	5% ↓	2%
65+	54% ↑	33% ↑	27%	20%	11%	13%	9% ↓	2% ↓	3%
Non-college	45%	24%	22%	19%	18%	17%	14%	8%	2%
College	39%	25%	29%	25%	15%	17%	17%	12%	2%



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