



DO YOU KNOW

WHAT PROBIOTICS ARE?

A consumer survey in 8 countries shows what consumers know and what they would like to know more about when it comes to **probiotics**



A SURVEY BY 3GEM

RESEARCH AND INSIGHTS

FOR IPA EUROPE

Survey conducted in February 2022.

IPA Europe is the European chapter of IPA, the International Probiotics Association, established in Brussels in 2015.

IPA Europe, together with its partner organisation IPA, brings together a platform of over 100 member companies in 29 countries. The members of IPA Europe are companies directly involved in the manufacture of probiotic cultures or probiotic foods, supplements, nutritional or therapeutic products:.

The IPA Europe mission is to gain the acceptance of the term “probiotic” throughout Europe as a defined category, and to create a favourable environment for probiotics in Europe.

OBJECTIVES

To monitor changes in opinions, trends, and behavior of European consumers regarding probiotic food and food supplements, the International Probiotics Association – Europe asked 3GEM to carry out a survey from a representative sample of 8.000 consumers in 8 European countries

CONTEXT

The survey was conducted from a representative sample, in 8 European countries:

- to assess people's understanding of the offer of probiotics currently on the market,
 - to acquire information about their use of probiotic foods and food supplements in everyday life.
 - to assess what consumers would like to know more about regarding probiotics.
- EU consumers are not well informed about the presence of probiotics in food and food supplements, because since 2007 most Member States followed the European Commission's guidance on the implementation of Regulation 1924/2006. Based on the guidance, 'probiotic' is considered a non-authorized health claim, and "contains probiotics/prebiotics", but also 'probiotic' as such cannot be used in label and communication (the EC guidance is non-binding, but for the EC is still the only reference to probiotics).
 - Since 2018, the situation in the EU evolved. Some EU countries issued national guidance and different interpretations are foreseen. These countries allow the use of the term 'probiotic', under certain conditions: Bulgaria, Czech Republic, Cyprus, Greece, Italy, Malta, The Netherlands, Poland, Spain and Denmark.

METHODOLOGY



A survey conducted online by 3 GEM in 8 European countries (Italy, Denmark, the Netherlands, Spain, Poland, Belgium, Germany, and Sweden, 8.000 consumers, 1.000 consumers by country, representative of the general population (from 18 years old and +) from several geographical areas per country ensuring a fair geographical distribution. **Gender:** about 50% of women and men in each country

•Italy, Denmark, the Netherlands, and Spain: the term 'probiotics' is allowed (under certain conditions) by National guidance/standard

•Poland, Germany, Belgium, Sweden: the term 'probiotics' is not allowed by National guidance/standard

▸ **Probiotics are popular. Even people who do not use or buy probiotics know the term (56% out of 8.000).**

Consumers who know what probiotic foods and supplements are, and who also consume them, mention that their main driver is their overall health and well-being.

Very often, the guidance for using probiotics comes from health professionals, which also explains why so many people are aware of this category but find no match when looking at product labels.

▸ **Consumers do not feel well informed that a product contains probiotics (57% out of 8.000).** The large majority of consumers would like to be informed about probiotics through, for example, food labels (79% out of 8.000). Consumers use probiotics and are more informed in countries that allow the use of the term for a long time.

▸ **There's a strong interest in probiotics:** there is an opportunity to inform and further educate consumers about the usefulness and usage of probiotics if the term can be used as the name of the category and as a nutrition claim.

▸ **About the impact of the regulatory environment on sales in the EU.** Since 2018, some EU countries gradually allow the use of the term 'probiotic', under certain conditions: this increased use of the term 'probiotic' is also reflected by the market evolution: during the period 2018-2021 the European market of probiotic food and food supplements shows a significant increase of sales of +9,08%.

CONTENT OF THE QUESTIONS

5 questions about the awareness of probiotics

Probiotic consumer profile

Probiotics are popular, even people who do not use or buy probiotics know the term

Consumers do not feel well informed that a product contains probiotics

Another term, such as 'live bacteria' or 'live cultures', are more known than the term 'probiotics'

Consumers would like to be informed about probiotics through, for example, food labels

1 open question about the drivers for consumption

The usefulness and usage of probiotics are not well known by the consumers

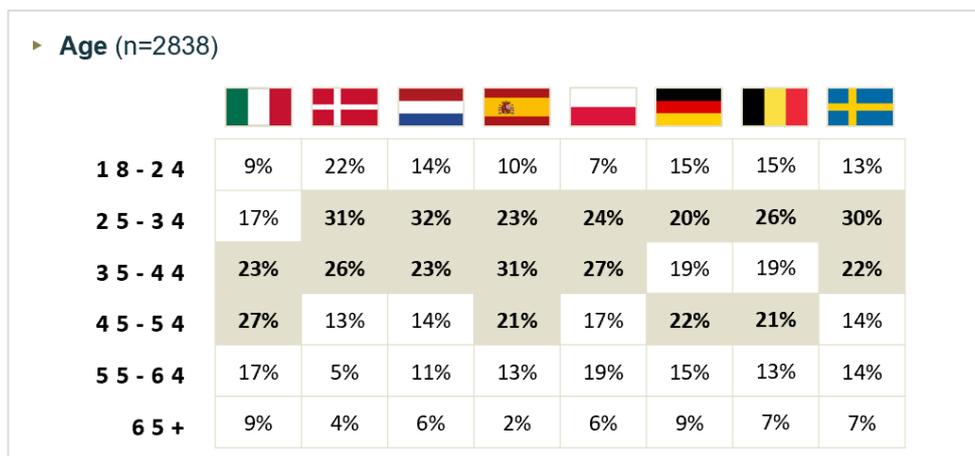
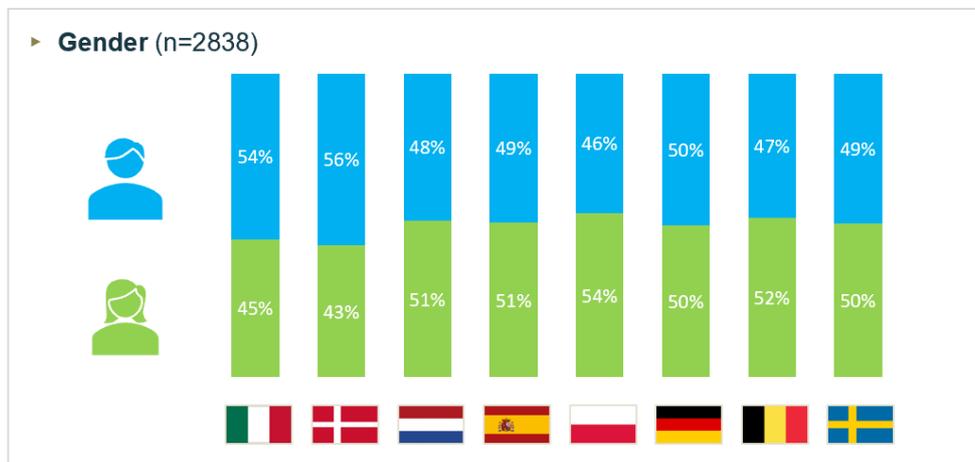
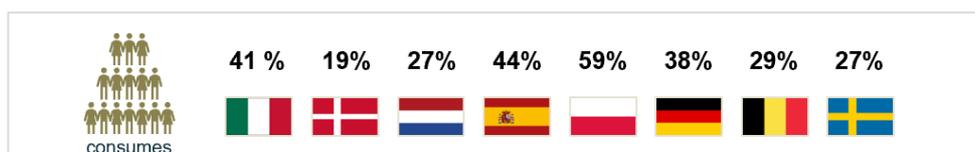


WHO ARE THE PROBIOTICS CONSUMERS?

The highest usage is shown in Poland (59%), Spain (44%), and Italy (41%). Lowest usage in Denmark (19%), The Netherlands, and Sweden (both 27%).

Women and men appear to be almost equally consuming probiotics. In Italy and Denmark, we see a slightly bigger male population among probiotic consumers.

On average the consumption peak is in the 25-44 y/o group. In Denmark, we see a disproportionally high usage among 18-24 y/o. Usage in Denmark drops after 44 y/o. In Italy, Poland and Germany we see relatively high usage in the 55+ group.



WHO ARE THE PROBIOTIC CONSUMERS?

RESULTS BY COUNTRY



In Italy, 41% of the 18+ population consume probiotics food and/or food supplements.



In Denmark 'only' about one-fifth of the population (19%) consumes probiotics food and/or food supplements.



About one-quarter of the Dutch population (27%) consumes probiotics food and/or food supplements.



Almost half of the Spanish population consumes probiotics food and/or food supplements (44%).



Almost two third of the Polish population consumes probiotics food and/or food supplements (59%).



In Germany, 38% of the population has indicated consuming probiotics food and/or food supplements.



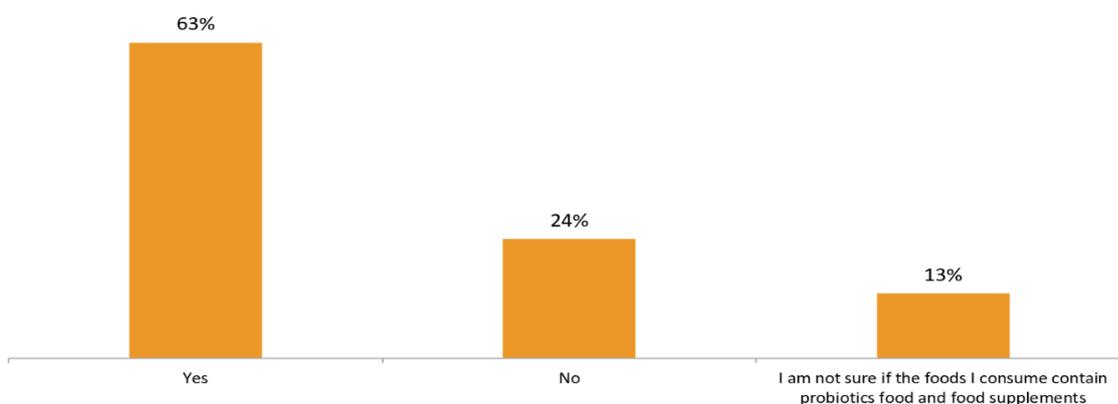
In Belgium, almost one-third of the population (29%) has indicated they consume probiotics food and/or food supplements.



Approximately one-quarter of the Swedish population consumes probiotics food and/or food supplements (27%).

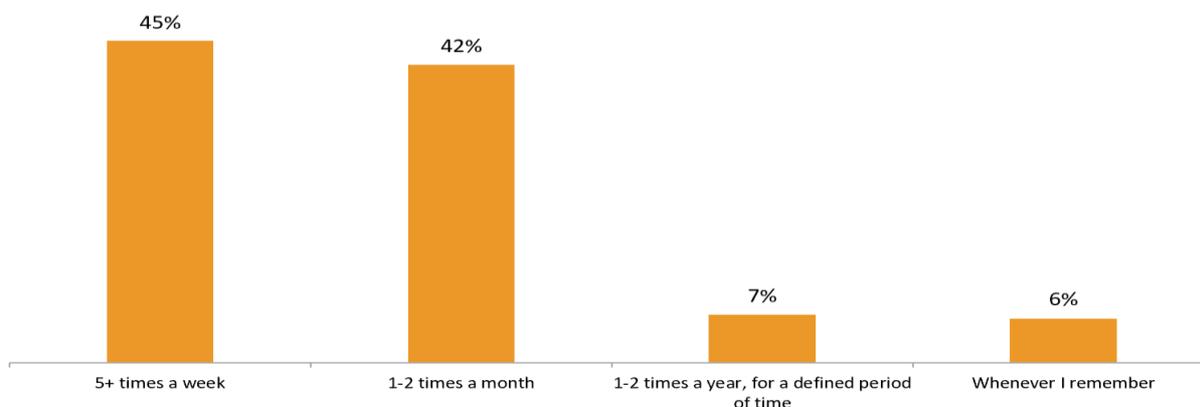
DO YOU CONSUME PROBIOTICS?

**Do you consume probiotics food and/or food supplements?
The answer is YES for 63% of the consumers across the 8 countries**



Base: Base (4491)

Among the people who indicated that they consume probiotic foods and food supplements, 45% have a frequency of 5+ a week



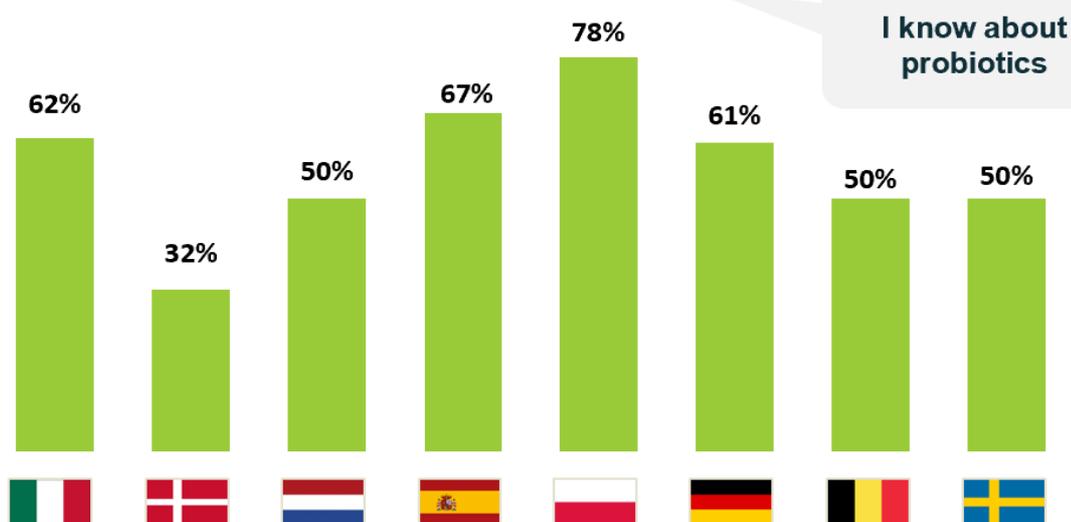
Base: Base (2838)

PROBIOTICS ARE POPULAR

The knowledge of probiotics food and food supplements varies across Europe. Consumers in Poland, Spain, and Italy (resp. 78%, 67%, 62%) are most aware. Danish consumers are least aware of what probiotic is (32%). Overall, however, high familiarity with probiotics across Europe.

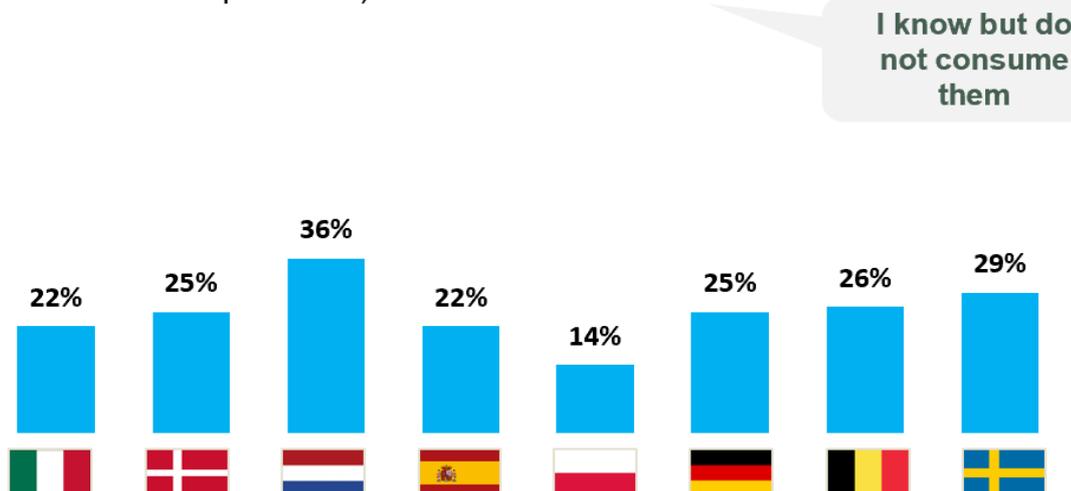
► Do you know what probiotics food and food supplements are?

(n=1000 per country)



► Do you consume probiotics food and/or food supplements?

(n=4491 subset of total population, only those who know what probiotics are, but don't consume probiotics)



COUNTRY FOCUS: ITALY

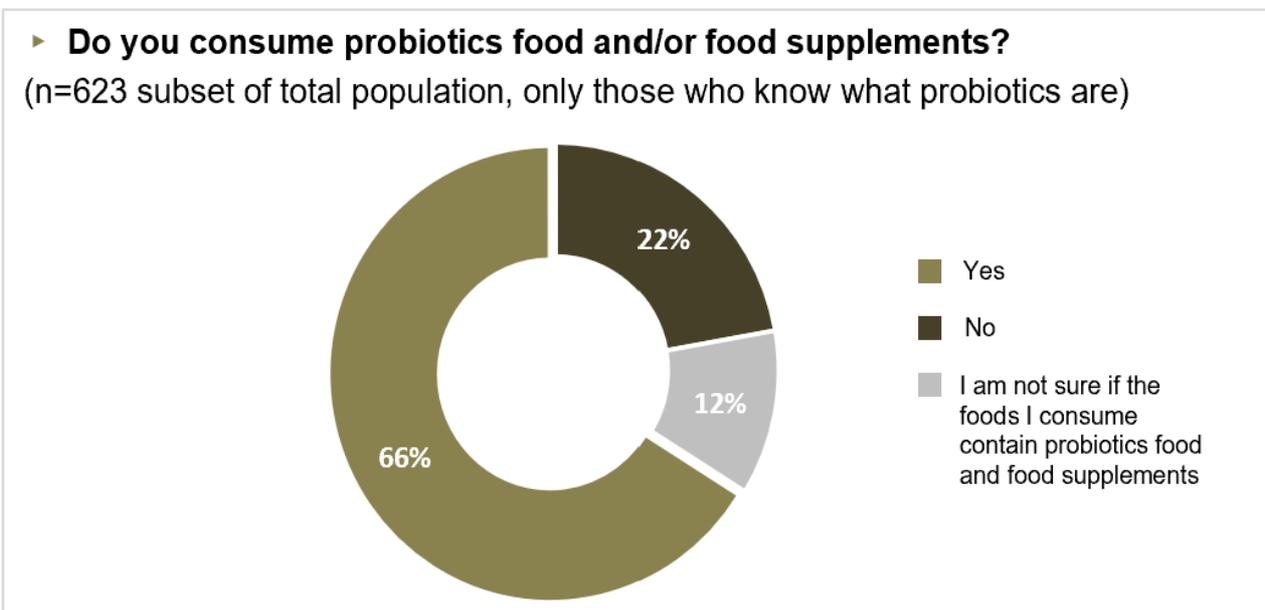
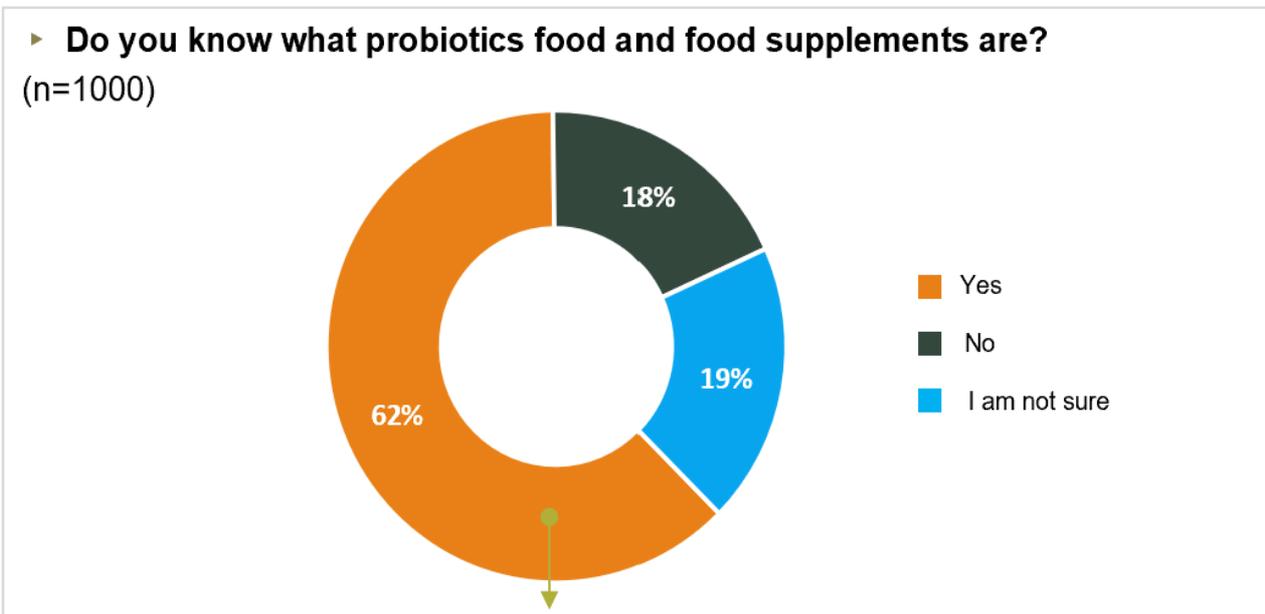


“Probiotics are popular, even people who do not use or buy probiotics know the term”

Almost two third (62%) of the Italian population know what probiotics food and/ or food supplements are.

Within that group:

- ▶ 66% also consume probiotics
- ▶ 22% know probiotics, but do not consume them



COUNTRY FOCUS: DENMARK



“Probiotics are popular, even people who do not use or buy probiotics know the term”

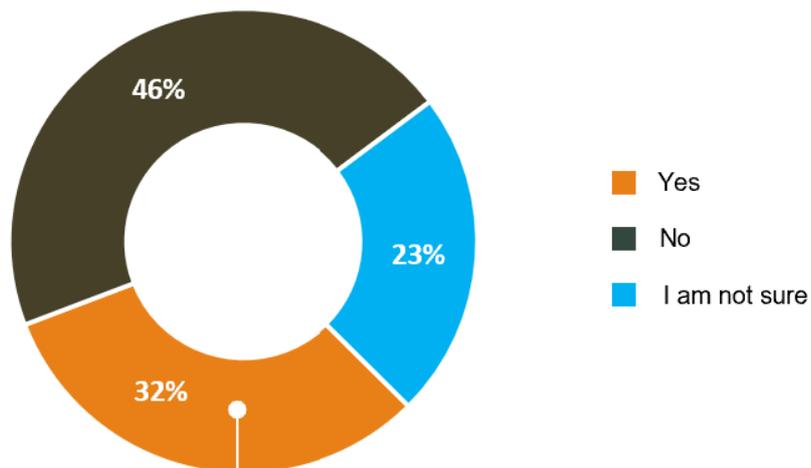
In Denmark, only one-third know what probiotics food and food supplements are.

Within the group of those familiar with probiotics:

- ▶ 61% also consume probiotics
- ▶ 25% know the product, but do not consume them

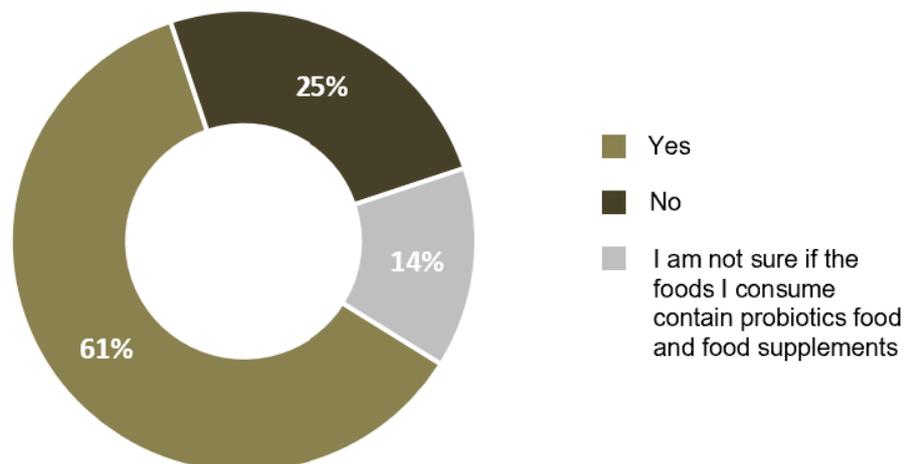
▶ Do you know what probiotics food and food supplements are?

(n=1000)



▶ Do you consume probiotics food and/or food supplements?

(n=316 subset of total population, only those who know what probiotics are)



COUNTRY FOCUS: THE NETHERLANDS



“Probiotics are popular, even people who do not use or buy probiotics know the term”

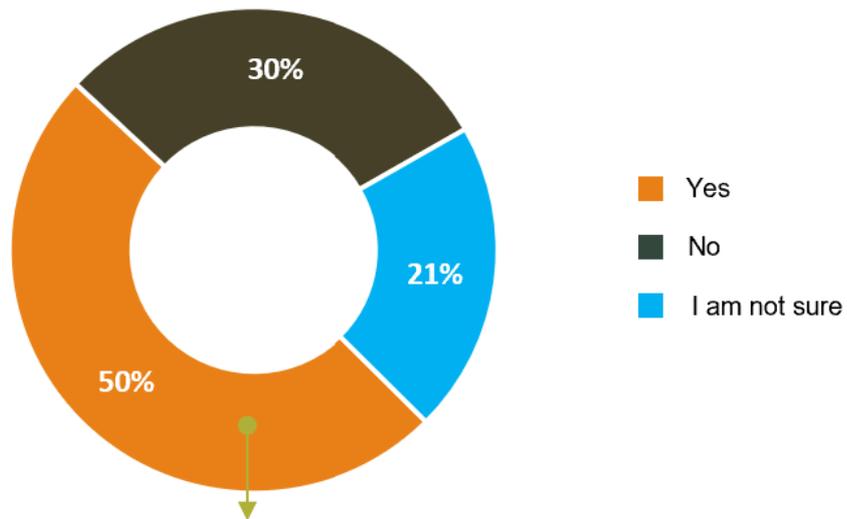
Half of the Dutch population knows what probiotics food and food supplements are.

Out of those that know probiotics:

- ▶ About half (54%) also consume probiotics
- ▶ More than 1/3 of the population (36%) know probiotics, but do not consume them

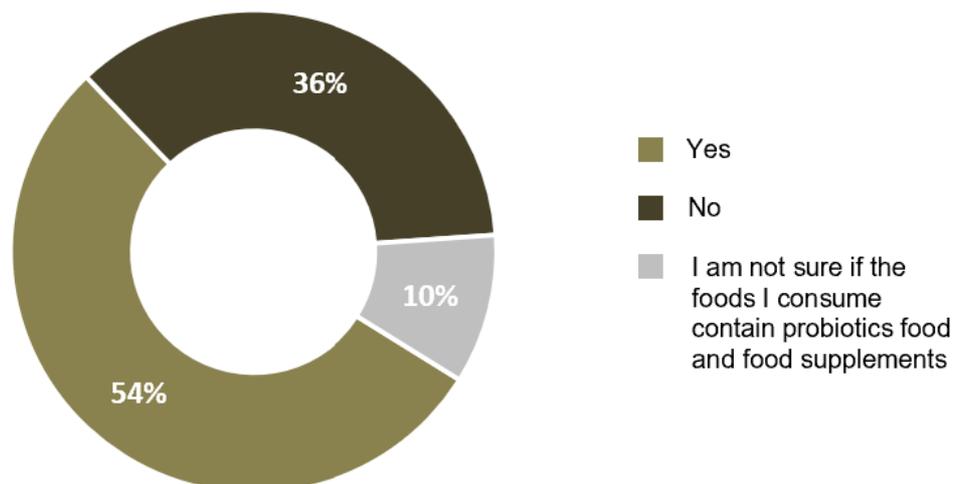
▶ Do you know what probiotics food and food supplements are?

(n=1000)



▶ Do you consume probiotics food and/or food supplements?

(n=500 subset of total population, only those who know what probiotics are)



COUNTRY FOCUS: SPAIN



“Probiotics are popular, even people who do not use or buy probiotics know the term”

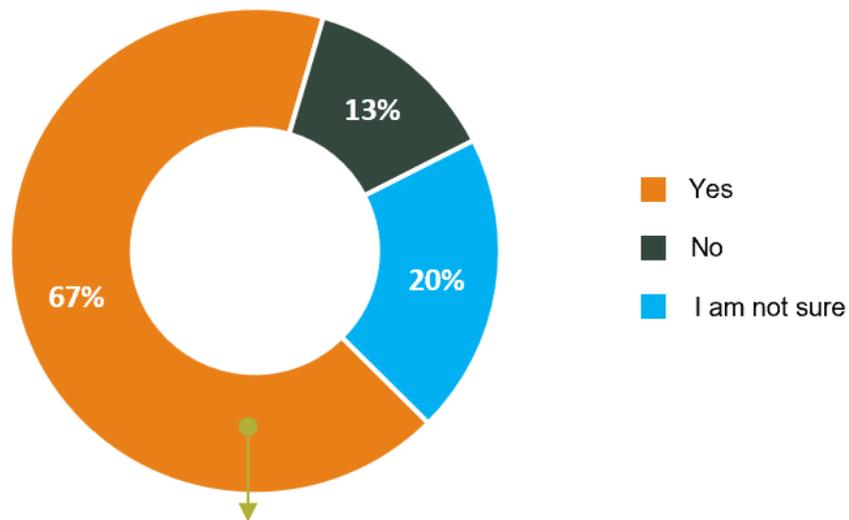
In Spain two third of the population (67%) know what probiotics food and food supplements are.

Within that group:

- ▶ 66% also consume probiotics
- ▶ 22% know probiotics, but do not consume them

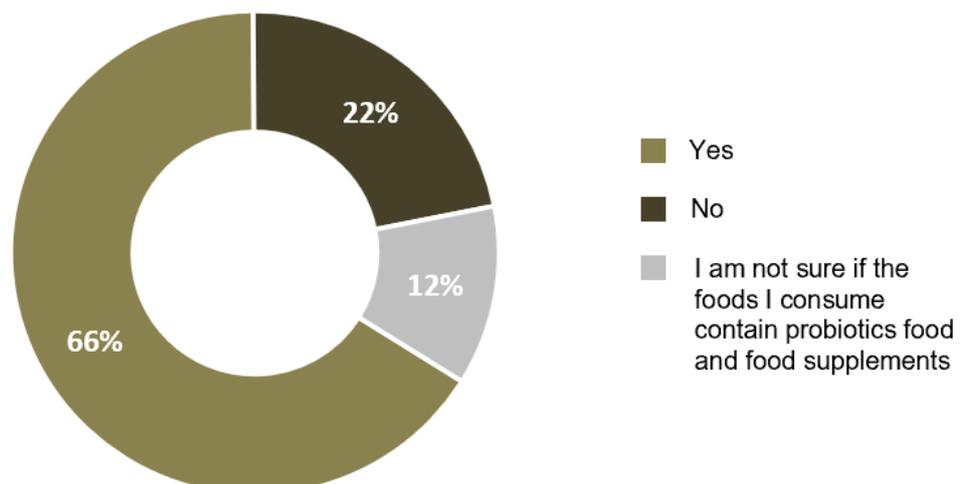
▶ Do you know what probiotics food and food supplements are?

(n=1000)



▶ Do you consume probiotics food and/or food supplements?

(n=668 subset of total population, only those who know what probiotics are)



COUNTRY FOCUS: POLAND



“Probiotics are popular, even people who do not use or buy probiotics know the term”

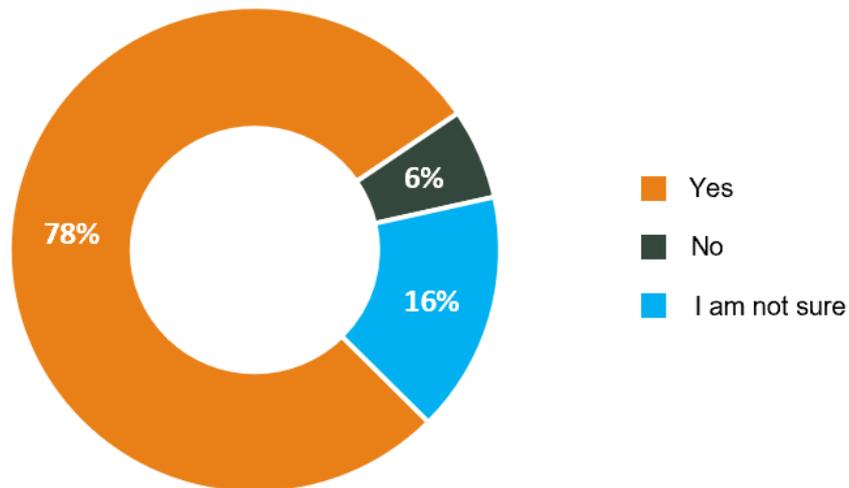
Most of the Polish population (78%) knows what probiotics food and food supplements are.

Out of those that know probiotics:

- ▶ Three quarter also consumes probiotics
- ▶ 14% know probiotics, but do not consume them

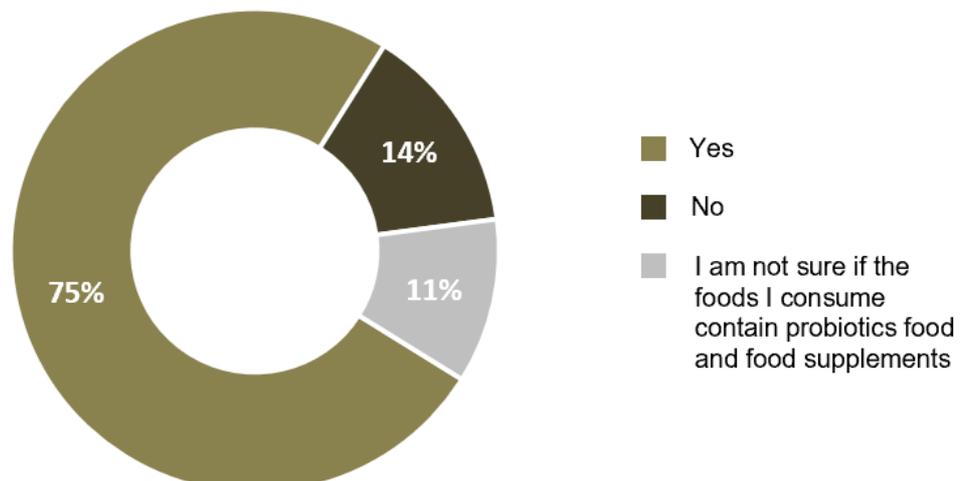
▶ Do you know what probiotics food and food supplements are?

(n=1000)



▶ Do you consume probiotics food and/or food supplements?

(n=781 subset of total population, only those who know what probiotics are)



COUNTRY FOCUS: GERMANY



“Probiotics are popular, even people who do not use or buy probiotics know the term”

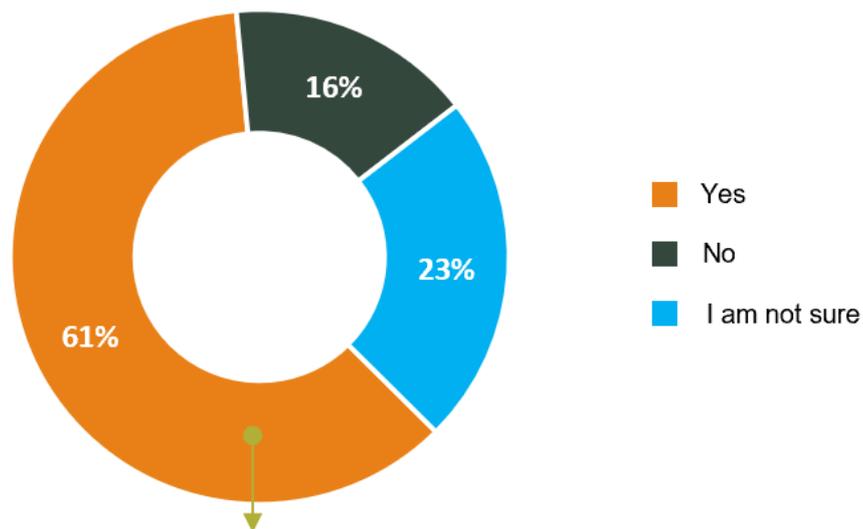
Almost two third of the German population (61%) know what probiotics food and food supplements are.

Within that group:

- ▶ 62% also consume probiotics
- ▶ A quarter know probiotics, but do not consume them (25%)

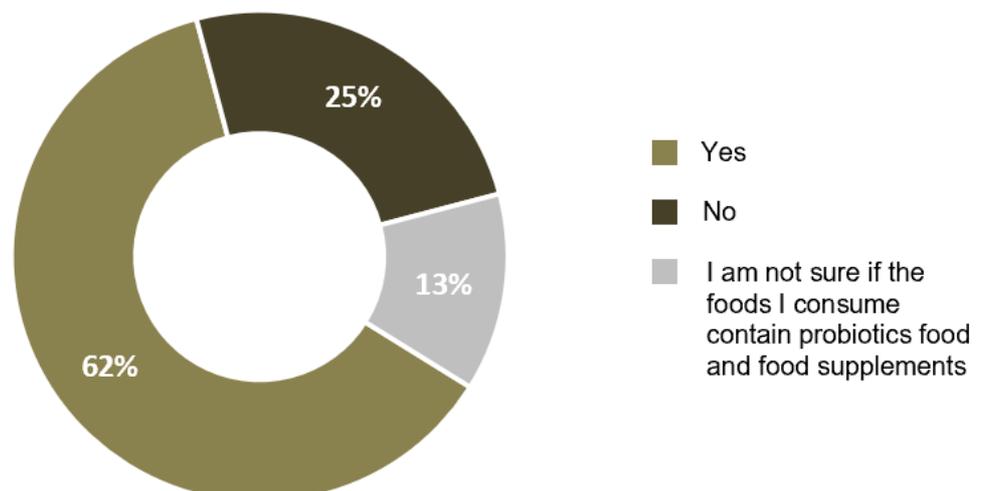
▶ Do you know what probiotics food and food supplements are?

(n=1000)



▶ Do you consume probiotics food and/or food supplements?

(n=607 subset of total population, only those who know what probiotics are)



COUNTRY FOCUS: BELGIUM



“Probiotics are popular, even people who do not use or buy probiotics know the term”

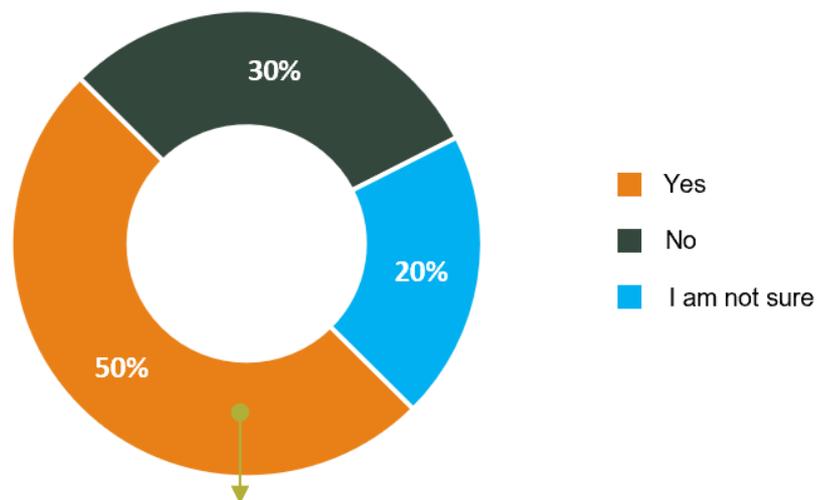
Half of Belgium’s population knows what probiotics food and food supplements are.

Out of those that know:

- ▶ More than half also consume probiotics (58%)
- ▶ A quarter know probiotics, but do not consume them (26%)

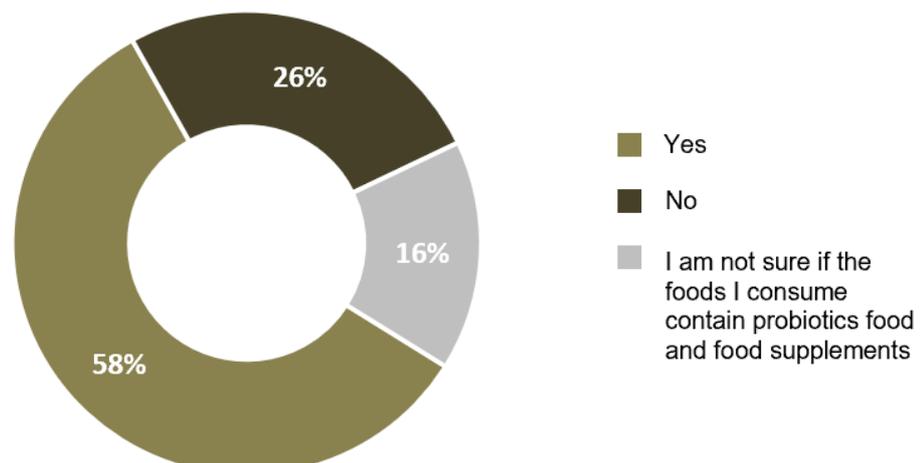
▶ Do you know what probiotics food and food supplements are?

(n=1000)



▶ Do you consume probiotics food and/or food supplements?

(n=501 subset of total population, only those who know what probiotics are)



COUNTRY FOCUS: SWEDEN



“Probiotics are popular, even people who do not use or buy probiotics know the term”

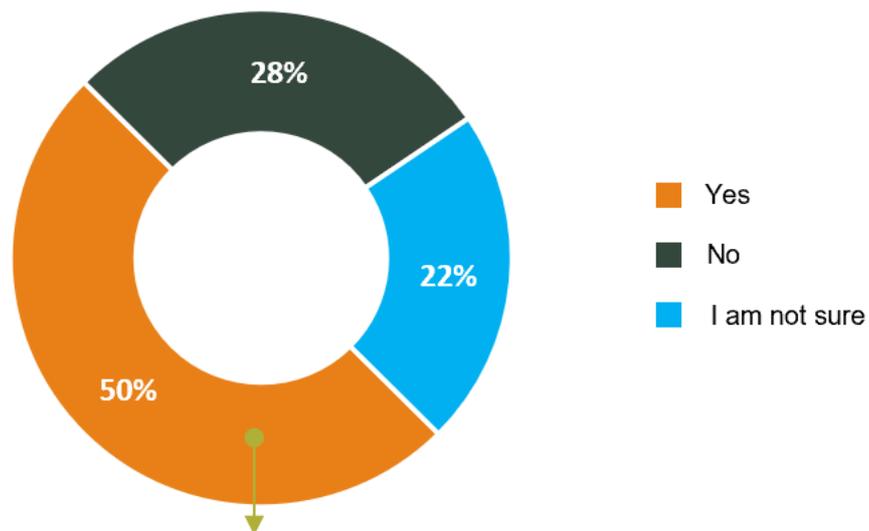
Half of the population of Sweden knows what probiotics food and food supplements are.

Out of those that know:

- ▶ More than half also consume probiotics (54%)
- ▶ More than a quarter know probiotics, but do not consume them (29%)

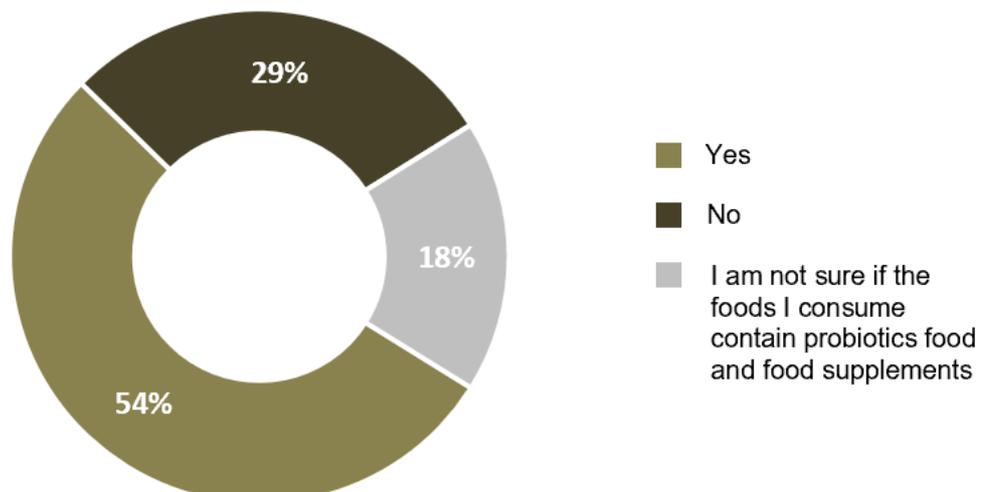
▶ Do you know what probiotics food and food supplements are?

(n=1000)



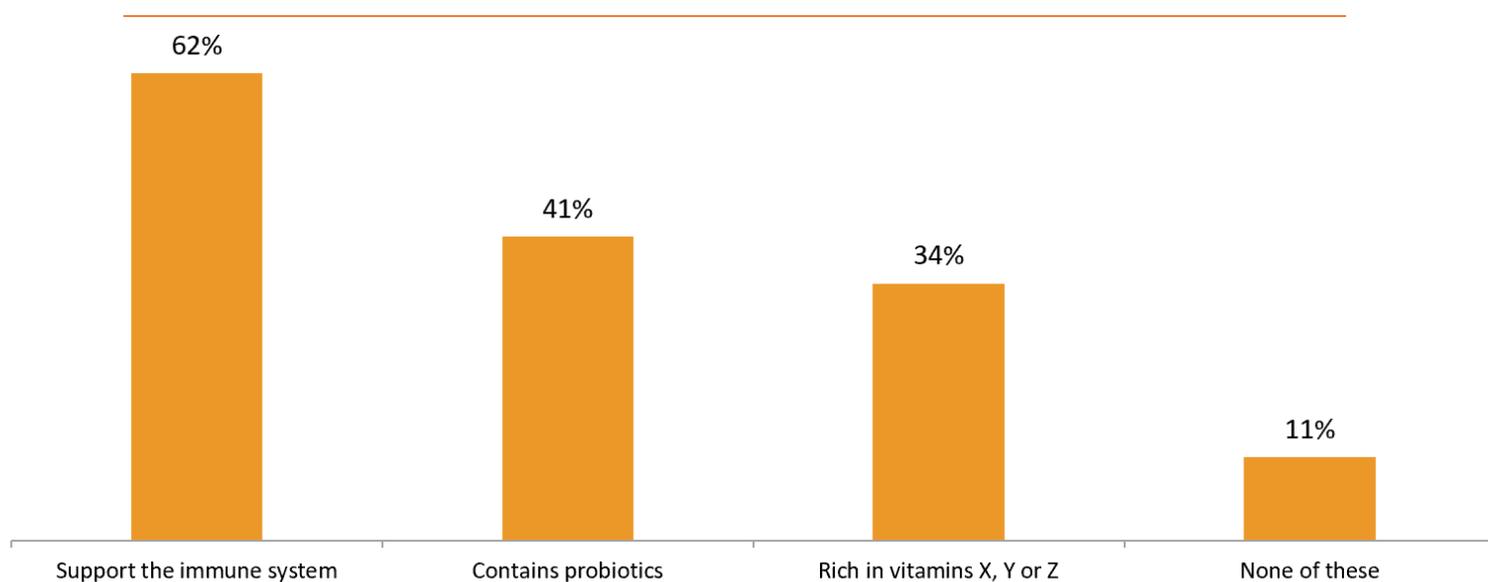
▶ Do you consume probiotics food and/or food supplements?

(n=495 subset of total population, only those who know what probiotics are)



WHICH OF THIS WORDING IS A HEALTH CLAIM?

When asked which of these formulations is a health claim, consumers do not choose "contains probiotics" as the first choice. More than half of the population in European countries do not consider "contains probiotics" as a health claim.



Base: Base (8000)



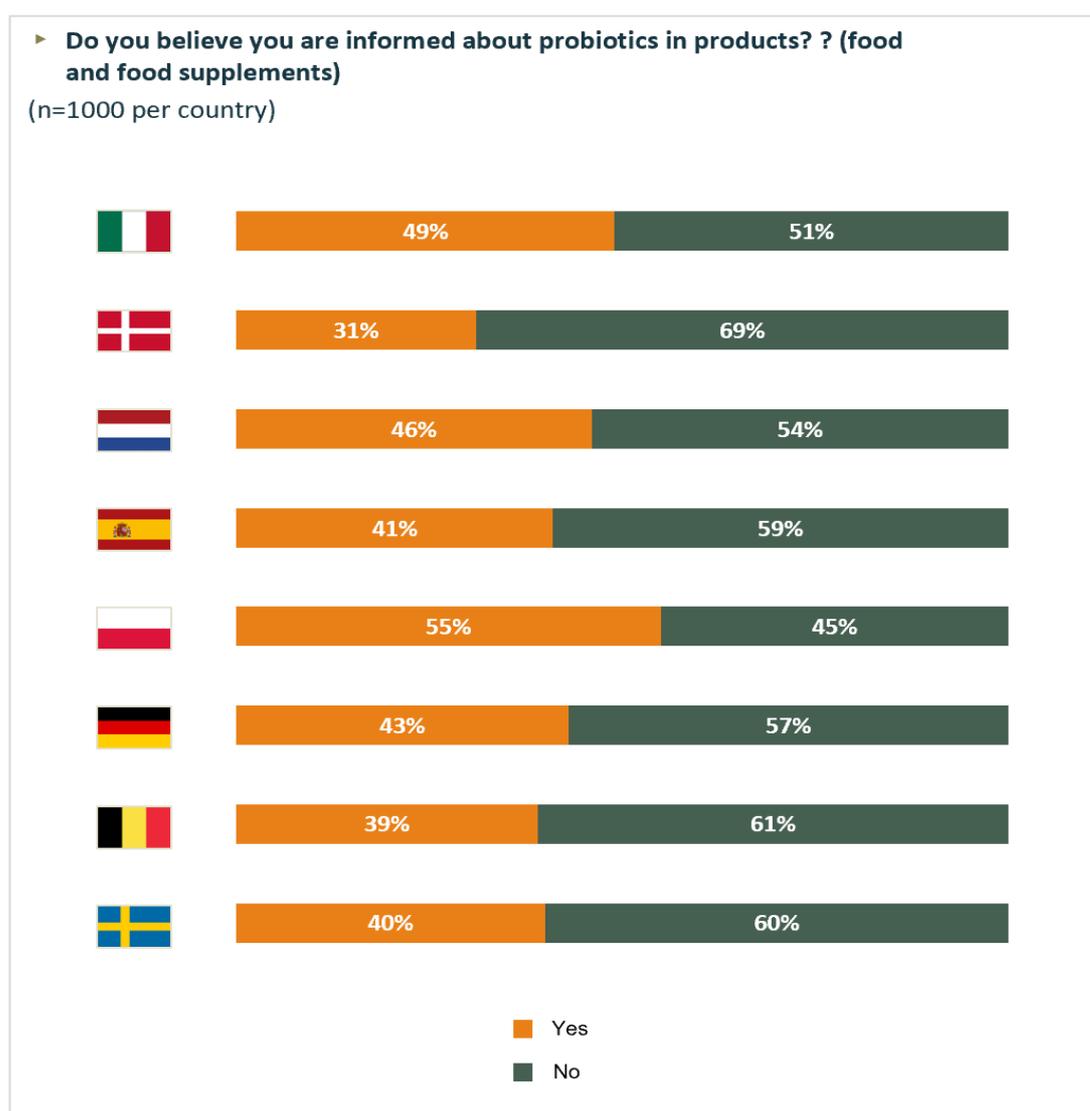
DO YOU BELIEVE YOU ARE INFORMED ABOUT PROBIOTICS IN PRODUCTS?

“Consumers do not feel well informed that a product contains probiotics”

In 7 out of 8 countries, consumers do not feel informed about probiotics in products.

Poland is the only market with a bigger group of people feeling informed (55% vs 45%). Even here, there is a high proportion (45%) of consumers that do not feel informed.

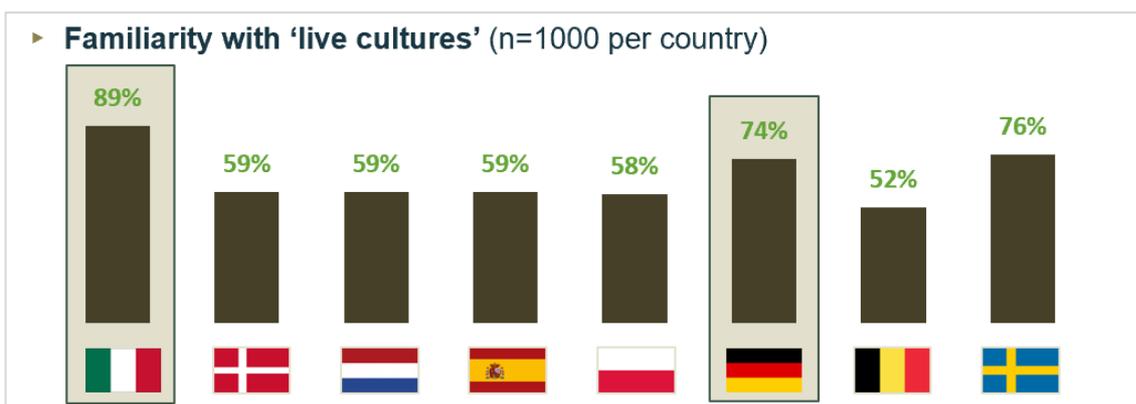
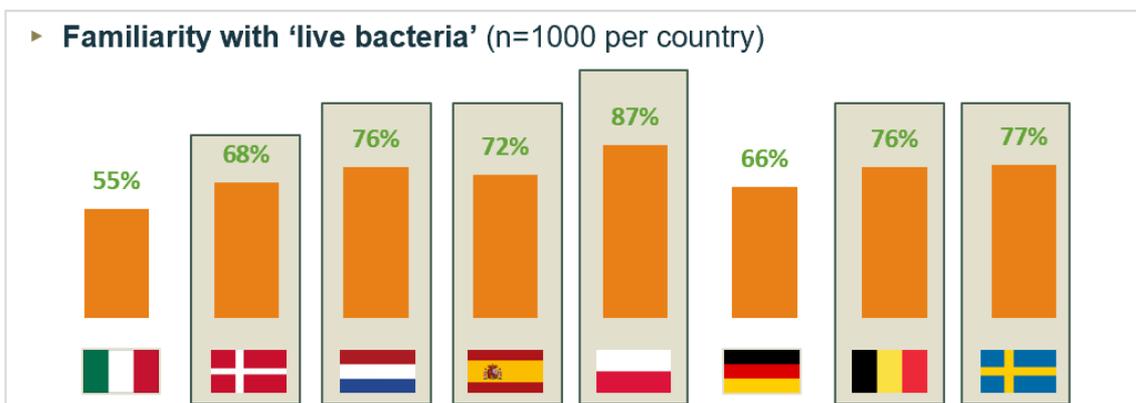
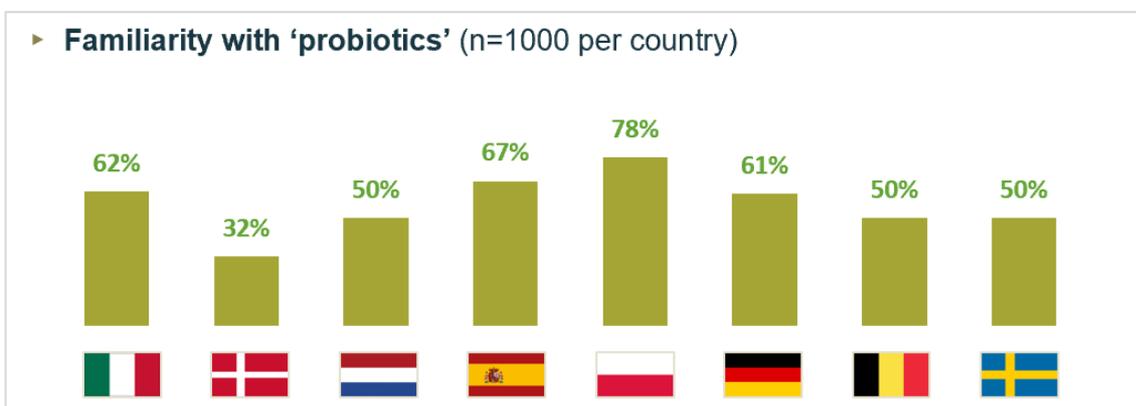
Denmark stands out as ‘only’ 31% of the population feels informed.



PROBIOTICS OR LIVE BACTERIA?

Probiotic is part of lactic bacteria or live bacteria. But not all live bacteria are probiotics. The use of these terms in some countries, like Italy, is also linked to traditional use. What we observe is that all countries are familiar with 'live bacteria' and/ or 'live cultures'. The fact that the term 'probiotic' was not allowed, makes the consumers familiar with these terms.

For both 'live bacteria' and 'live cultures', the percentage of people that know the term is higher among probiotic connoisseurs and users than in the general population.



Most familiar with

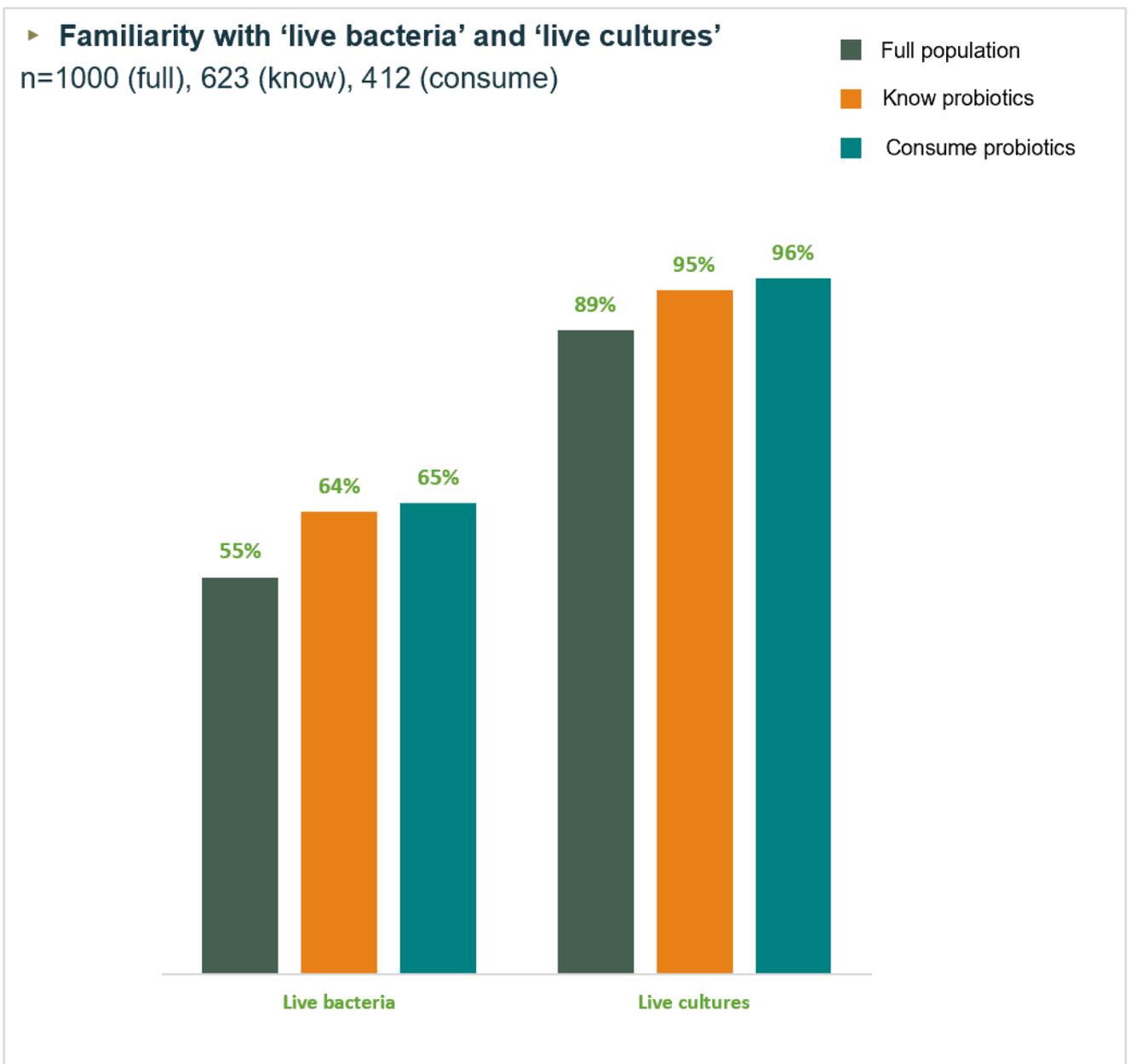
COUNTRY FOCUS: ITALY



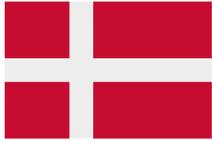
'Batteri vivi'– 'Fermenti vivi'
"

A very large portion of the Italian population is familiar with 'live cultures' (89%). On the other hand, only 55% know the 'term live bacteria'.

This is also due to the traditional use of this term associated with the term 'probiotic'.



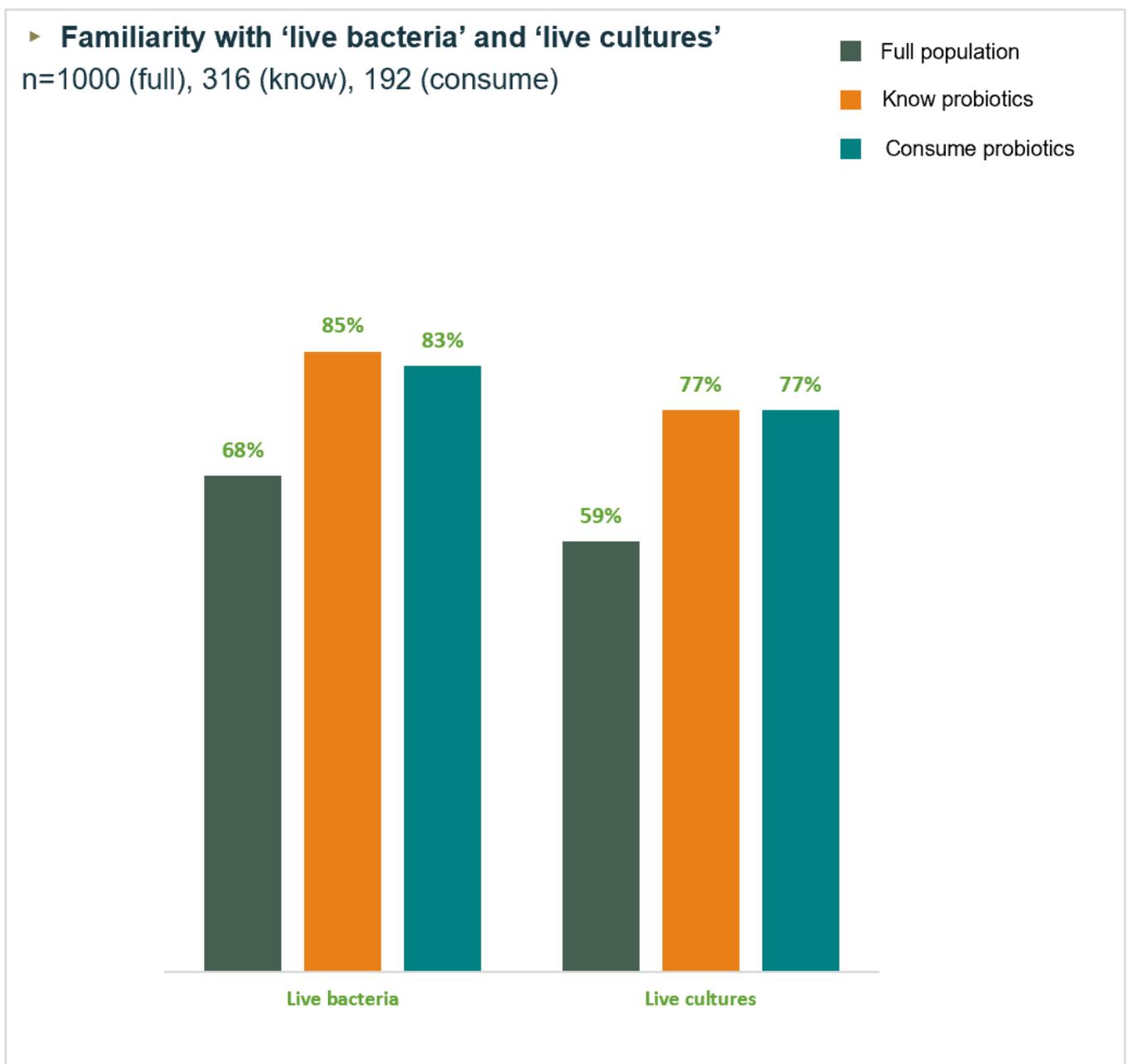
COUNTRY FOCUS: DENMARK



‘Levende bakterier’ – ‘Levende kulturer’

In Denmark, amongst the full population, people are more familiar with the terms ‘live bacteria’ than ‘live cultures’.

This is also due to the national definition used in this country.

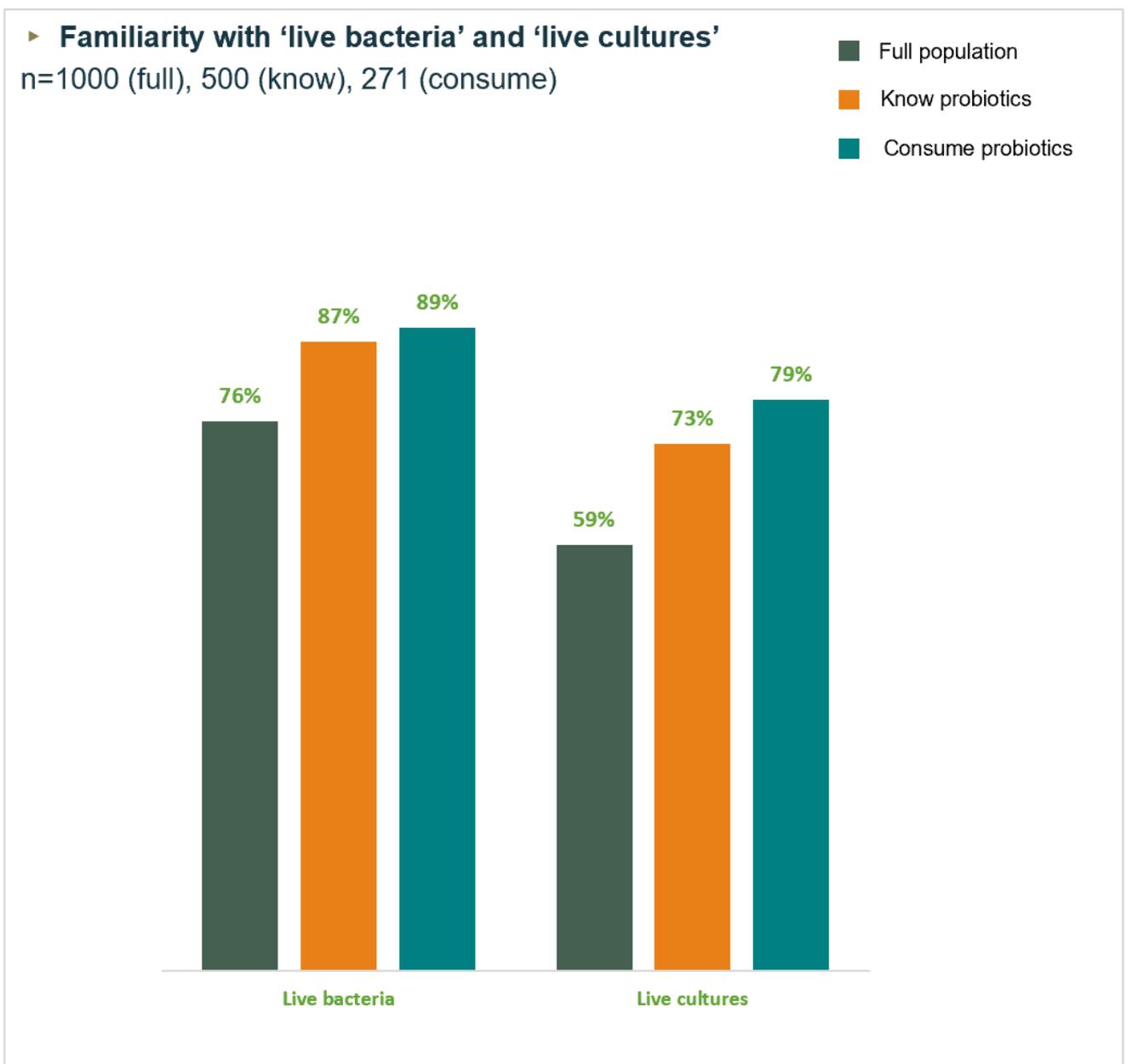


COUNTRY FOCUS: THE NETHERLANDS



‘Levende bacteriën’ – ‘Levende culturen’

In the Netherlands, 76% are familiar with ‘live bacteria’ whereas ‘live cultures’ are only known by 59%.

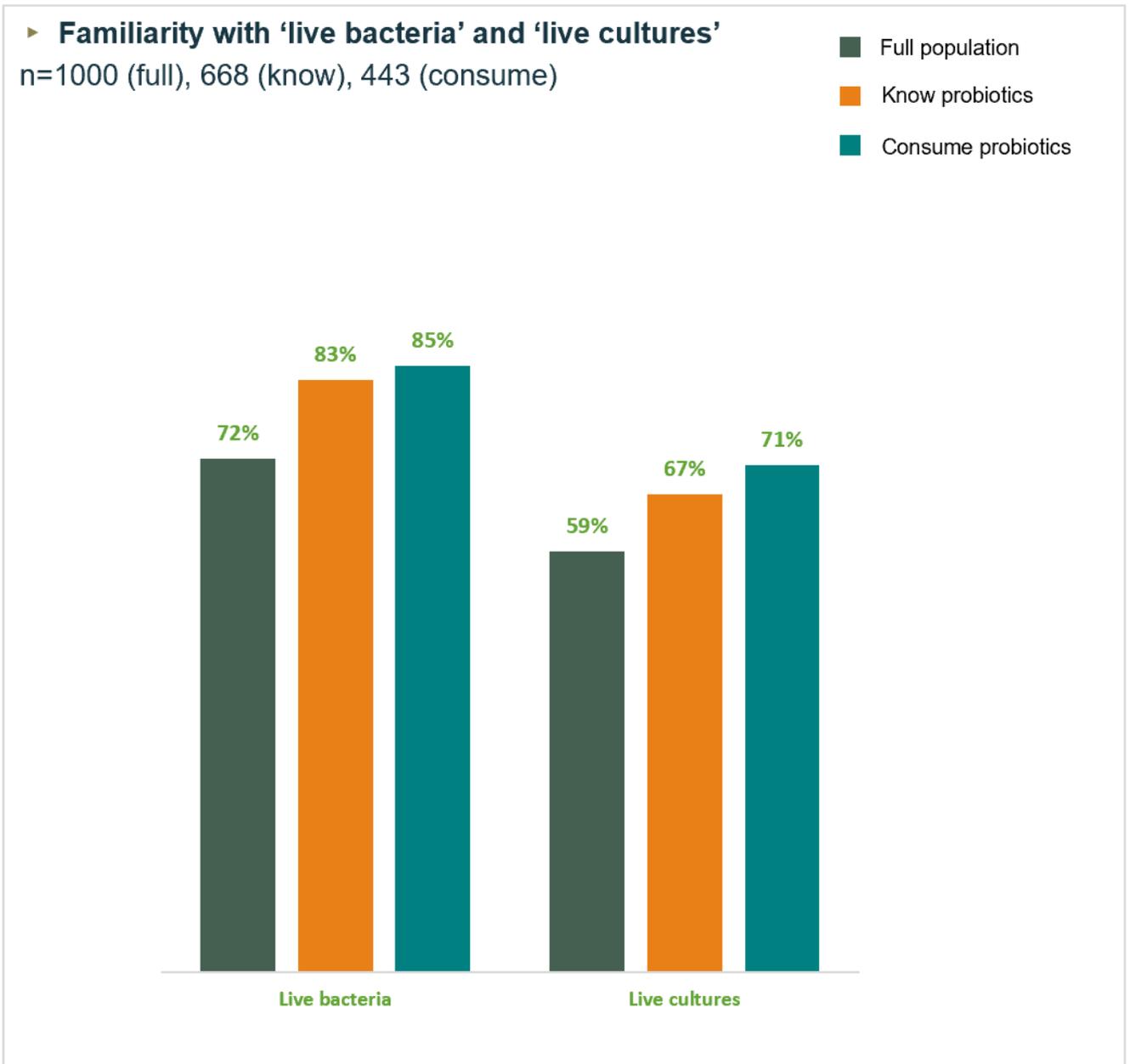


COUNTRY FOCUS: SPAIN



'Bacteria vivas' – 'Cultivos vivos'

In Spain, 72% of people are familiar with 'live bacteria', whereas 'live cultures' are only known by 59%.



COUNTRY FOCUS: POLAND



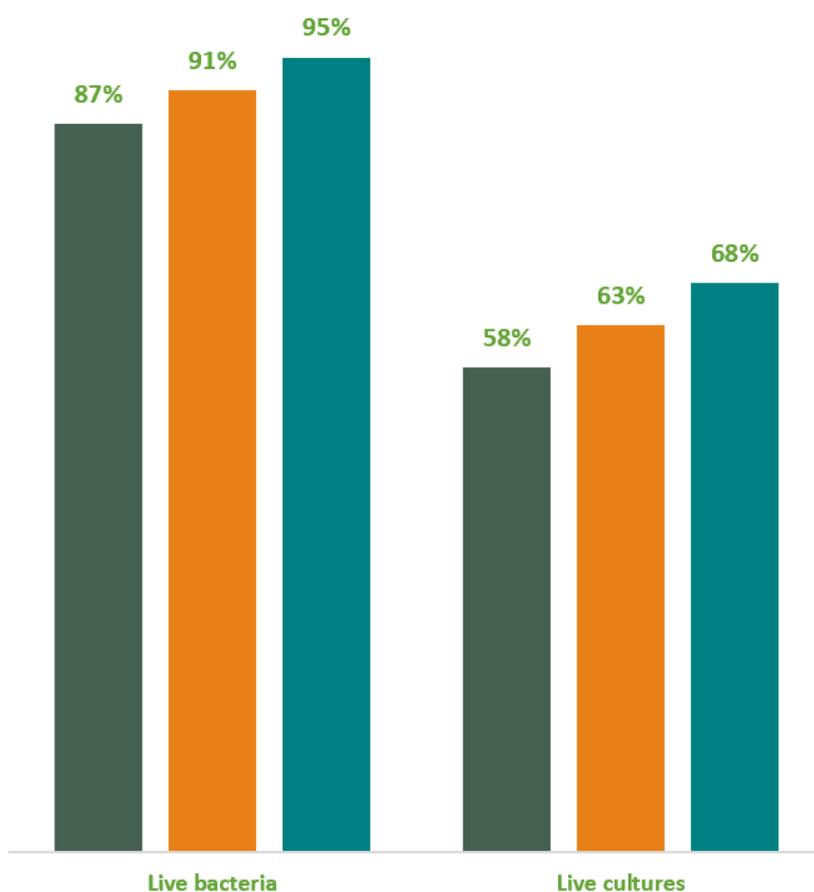
‘Żywe kultury bakterii’ – ‘Żywe kultury’

In Poland, almost 9 out of 10 people are familiar with ‘live bacteria’ (87%), whereas ‘live cultures’ are known by only 58%.

► Familiarity with ‘live bacteria’ and ‘live cultures’

n=1000 (full), 781 (know), 585 (consume)

- Full population
- Know probiotics
- Consume probiotics

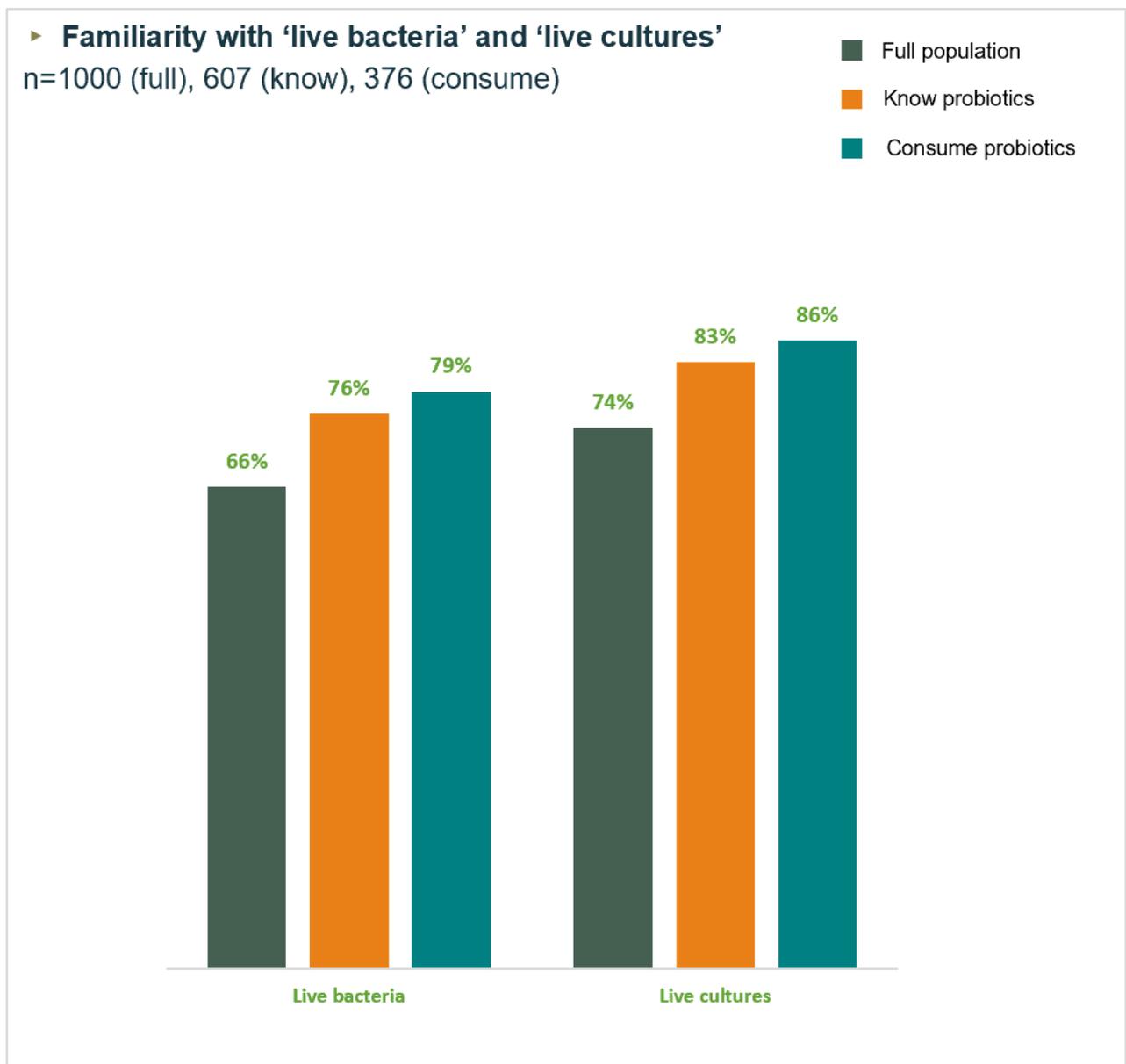


COUNTRY FOCUS: GERMANY



‘Lebende bakterien’ – ‘Lebende kulturen’

In Germany, 2 out of 3 people know about ‘living bacteria’. Familiarity with the term ‘live cultures’ is higher: 3 out of 4 people.

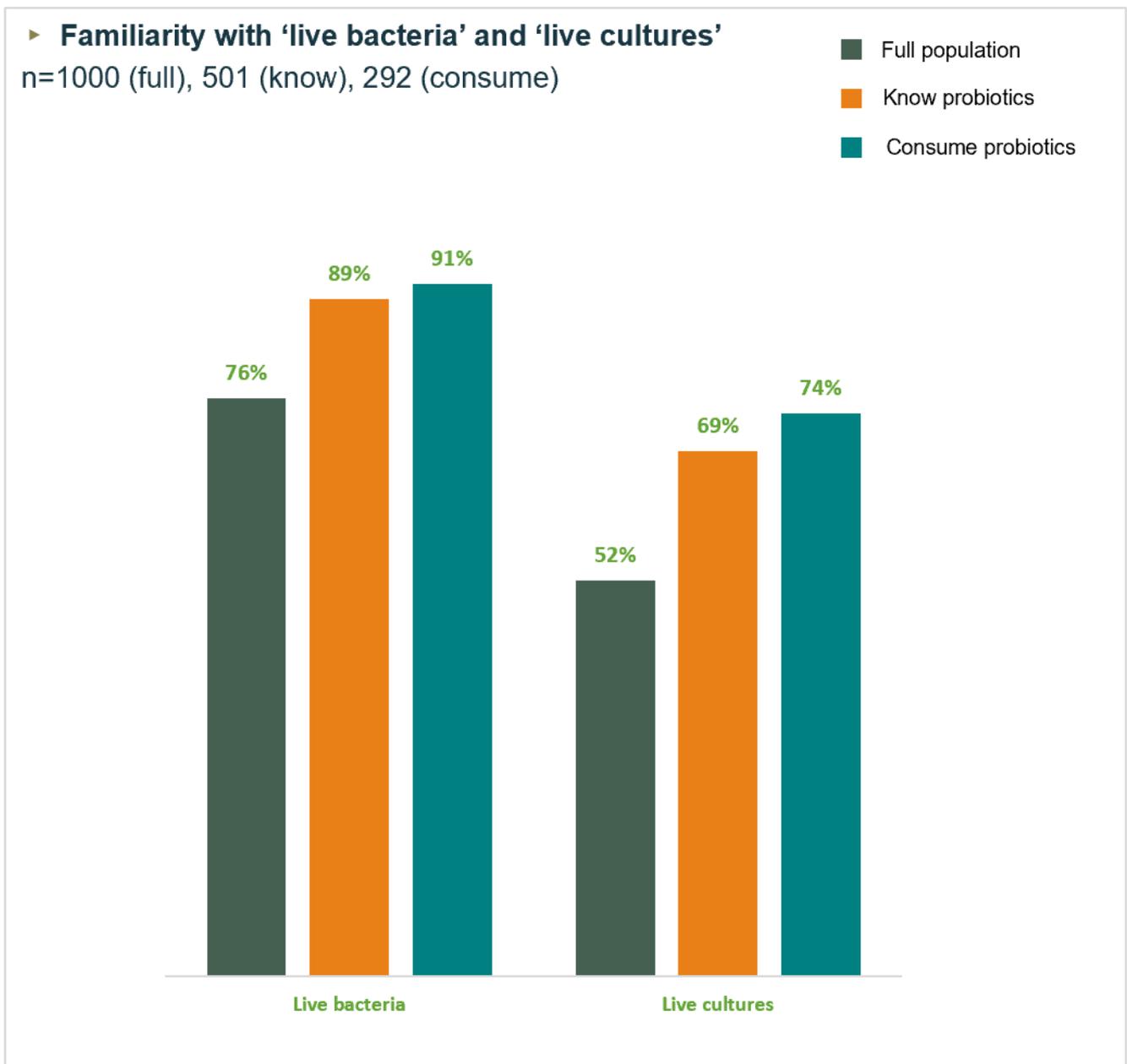


COUNTRY FOCUS: BELGIUM



'Bactéries vivantes' – 'Cultures vivantes'

In Belgium 3 out of 4 people are familiar with 'live bacteria' (76%), whereas 'live cultures' are known by only half of the Belgian people (52%).

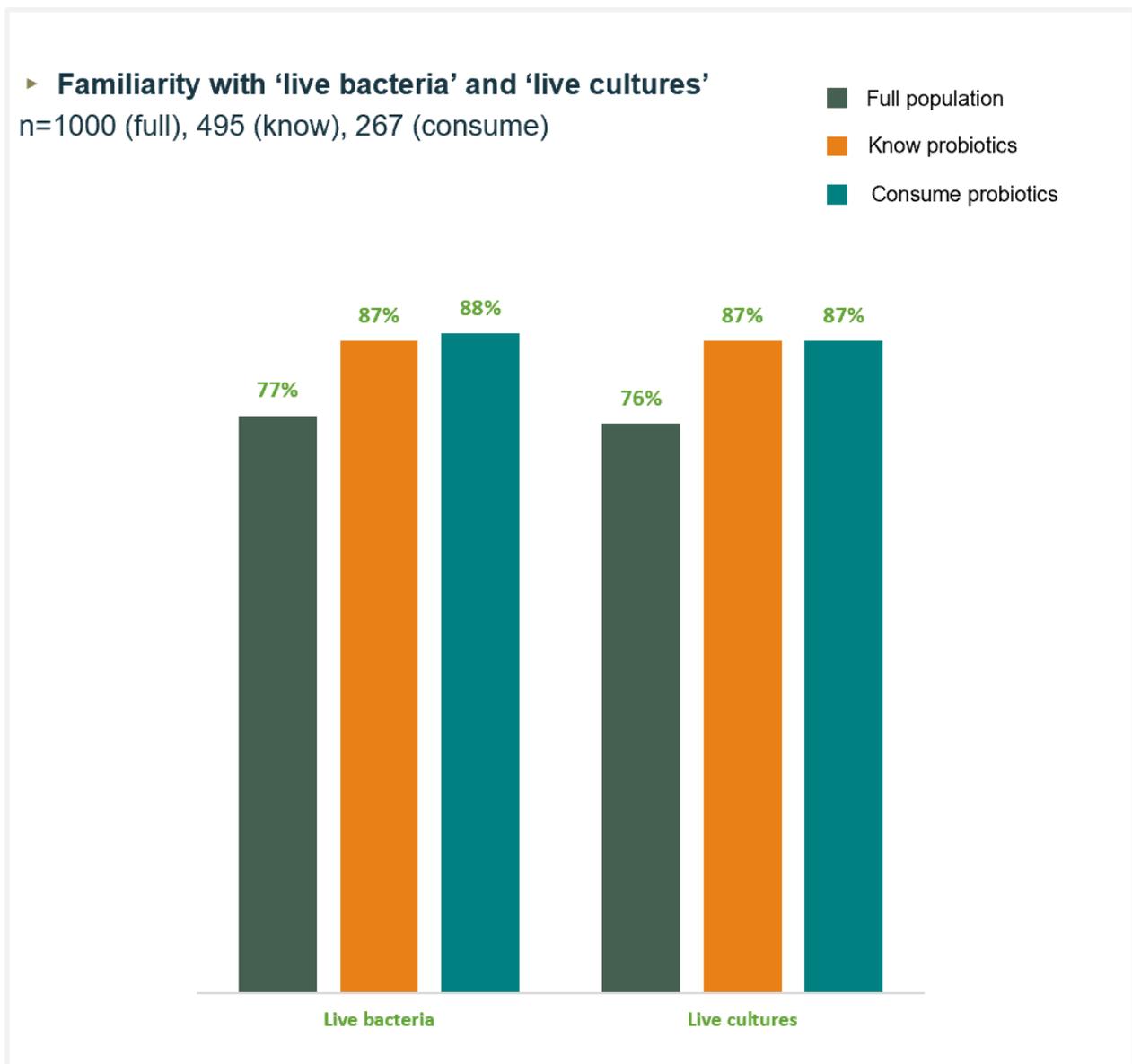


COUNTRY FOCUS: SWEDEN



‘Levande bakterier’ – ‘Levande kulturer’

In Sweden 3 out of 4 people are familiar with both ‘live bacteria’ and ‘live cultures’.

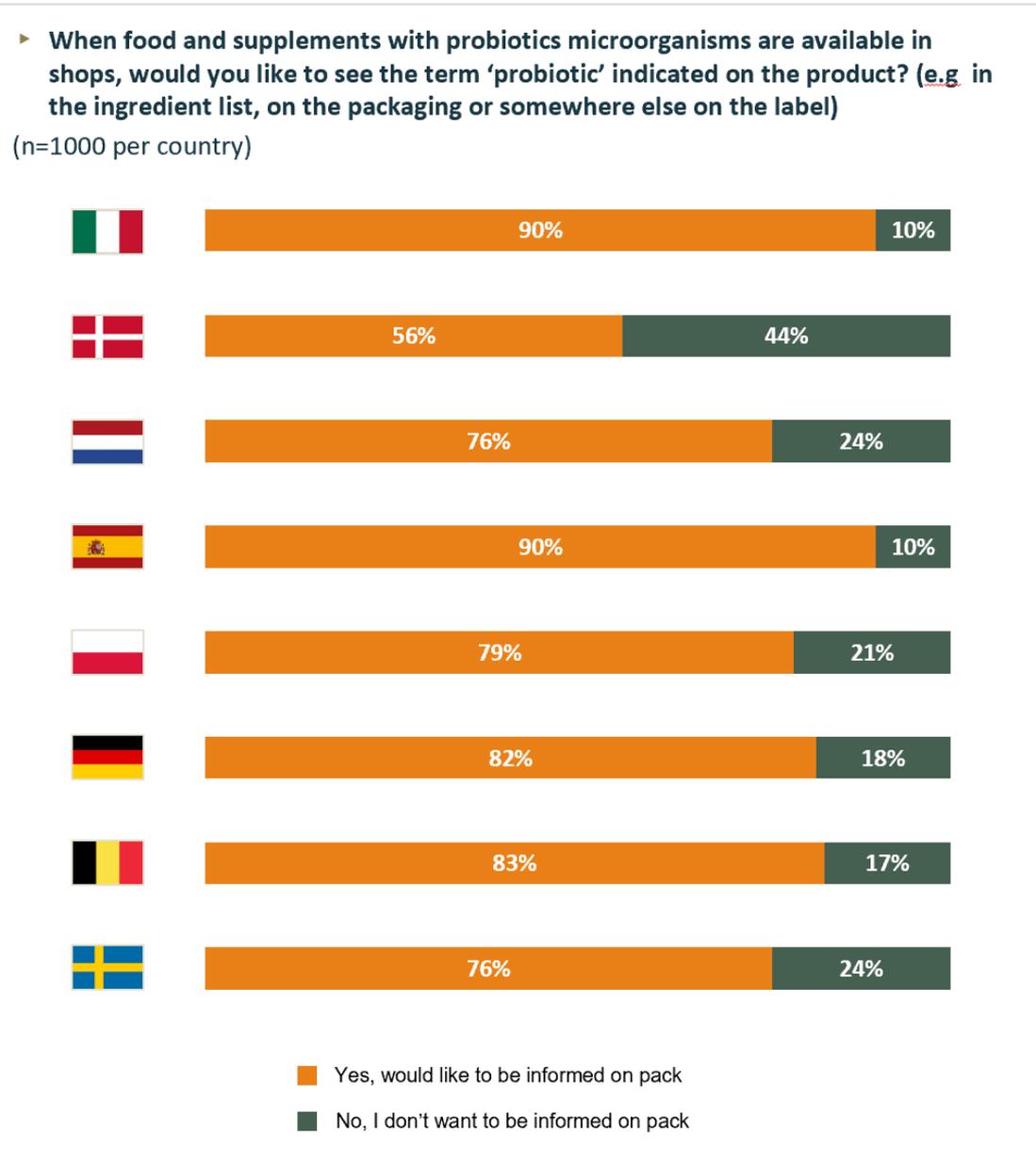


“79% of the consumer panel would like to be informed about probiotics through, for example, food labels”

In all tested markets, consumers indicate they would like to see the term ‘probiotic’ indicated on the packaging.

The markets that are strongest about the request of information on the packaging are Italy and Spain.

Denmark seems to be most divided on the issue. Nevertheless, slightly more than half of the Danish population would like to see more information on the product.



WHAT DO YOU THINK PROBIOTICS ARE USEFUL FOR?

FOR WHAT REASONS DO YOU CONSUME PROBIOTICS?

Useful

Consumers know what probiotics food and food supplements are, but do not know if they consume them: they mainly refer to probiotics having a beneficial effect on the bacterial flora, digestion, and stomach.

Reasons

Consumers that know what probiotics food and food supplements are, and also consume them, mention that their main drive for probiotics consumption is overall health and well-being.

► What do you think probiotics are useful for?

n= consumers that know what probiotics food and food supplements are, but do not (know if they) consume it.

Improve bacterial flora, digestion, stomach	14%	20%	31%	30%	24%	23%	24%	41%
Allergy, immune system, support, prevent disease	23%	12%	11%	23%	22%	19%	27%	18%
Good Health, wellbeing, reinforce	11%	11%	14%	17%	9%	18%	12%	18%
Did not answer, no idea, other use	55%	58%	50%	36%	50%	47%	42%	33%
n	211	124	229	225	196	231	209	228

► For what reasons do you consume probiotics?

n= consumers that know what probiotics food and food supplements are, and also consume it.

Improve bacterial flora, digestion, stomach	12%	18%	15%	23%	18%	17%	18%	32%
Allergy, immune system, support, prevent disease	27%	9%	6%	13%	21%	14%	15%	14%
Good health, wellbeing, reinforce	25%	44%	45%	46%	36%	43%	32%	30%
Did not answer, no idea, other use	37%	35%	39%	23%	28%	29%	39%	29%
n	412	192	271	443	585	376	292	267



The panel of consumers would like to be more informed about probiotics food.

- There is an opportunity to inform and further educate consumers about the beneficial role that probiotics can play in diet and well-being.
- Very often, the guidance for using probiotics comes from health professionals, which also explains why so many people are aware of this category but find no match when looking at product labels.

Is the regulatory situation influencing the European market? Yes

Consumers are better informed in countries where the term 'probiotics' is (partially) allowed by National guidance/standard: this is the case, for example, of Italy, Spain, Poland.

As a general comment, the lack of a clear legal framework on probiotics in the EU does not meet the consumer's demand of better information on food products.



FIND OUT MORE

ipaeurope.org

**THIS PROJECT WAS DEVELOPED WITH
THE VALUABLE CONTRIBUTION OF THE
IPAEUROPE STEERING COMMITTEE**