EXPLORING THE PREGNANCYJOURNEY FOR ELEVIT

Australia

Full Results

May 22th, 2025
25-008247

Elevit CSJ

What do we aim to find?

BOOST - HELP ELEVIT STAY STRONG IN AUSTRALIA

EXTEND - HELP ELEVIT TO KEEP ON GROWING IN MEXICO

Emotional Factors & **Key Needs** per pregnancy stage

Drivers of Superiority to build **Competitive Strategy**

Main **Influencers** (online / offline) & their narrative

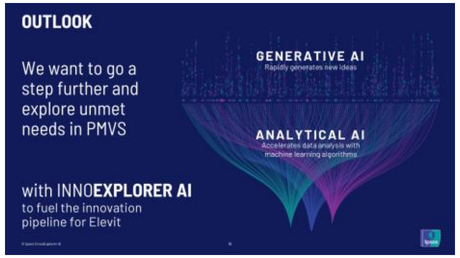
Opportunity Targets for Elevit along the journey

Key **Moments** of Purchase Decision Making

Potential needs for **Educational Support**

Assess **Portfolio Coverage** and potential add ons

Opportunities to keep consumers along the journey



Quantitative Consumer Shopper Journey Research Design in a Nutshell

DATA COLLECTION

Online interviews within IIS online access panel or partner panels

LENGTH OF QUESTIONNAIRE

Ø 23 minutes

Incl 4 open questions

COUNTRIES IN SCOPE / INCIDENCES AMONG WOMEN 18-45 YO

- Australia: 24%
- Mexico: 28%

TARGET GROUP

- Females aged 18-45 years who have used supplements for fertility, pregnancy, breastfeeding or motherhood in the last 12 months*
- Each woman was asked on her current pregnancy stage + selected questions for previous stages incl. fertility
- Additional sample of n=100 PMVS non-users in any pregnancy stage to explore their involvement, worries, potential unmet needs / category entry consideration

SAMPLE SIZE

- Total sample: n=1.000 completes per market (incl max 100 PMVS non-users)
- Natural fallout of the following sub targets:
  - Planners:
    - **Fertility boosting**
    - **Fertility Issues**
    - **Currently trying to conceive (TTC)**
  - **Pregnant women** (+ boost in Mexico)
  - **Breastfeeding**
  - **Other new moms**
- Quota:
  - Quota to ensure subgroup read on age: (Younger women 18-34 yo. vs. older 35-45 y.o.)
  - Quota on region (national representative)

Social Media Listening: Our Synthesio approach

combining AI & Human Intelligence to harness this rich data source

Social Media as rich source

Before or during pregnancy, women often feel insecure and not only consult their gynecologists but **seek reassurance and information from their peers**. Many consumers turn to **Social Media** to **ask for advice, share their experience** or discuss different **treatment options.** While doing so, they come across a lot of **valuable content** that is distributed in a variety of formats by **professional influencers** such as **gynecologists** or **midwives**.

These conversations happen across a range of sources, such as **online forums**, **TikTok or YouTube**, or in form of **online product reviews.**

We therefore recommend that **both sides of this valuable discourse be evaluated** in a targeted manner to **better understand the topic universe related to pregnancy and the role of supplements** in a bottom-up process.

This Social Media Listening approach delivers a **unique and authentic perspective on women's current fears, needs, barriers, pain points and first-hand experiences**.

Multi-layered insights

A Social Media Listening will generate additional insights in areas such as:

- **Digital landscape**: Key sources & protagonists
- **Key themes,** their discussion volume & development over time
- **Targeted analysis** of the following areas of tension (top-down):
  - **Morning sickness**
  - **Unplanned pregnancy**
  - **Post Partum**
  - **"Healthy mom means healthy baby?'**
- **Pain points** across the different stages of (pre-) conception and pregnancy
- Current **needs, barriers & pain points**
- **First-hand experiences** with supplements/ treatments, role of products in professionals' communication

Methodology

- Targeted data collection across Social Media sources in Australia and Mexico using Ipsos-proprietary, award-winning **Synthesio** software
- AI-assisted pre-categorization of the data corpus, extraction of key themes
- Research-led content analysis based on most valuable content

THE PMVS JOURNEY
AT A GLANCE

- **Overall** flow, key touchpoints & pain points, opportunities for Elevit
- Her pregnancy journey – where does Elevit win and loose **by stage**
- **Opportunity targets** – (un)planned pregnancies, generation gaps

PMVS Consumer Shopper Journey – Key Touchpoints & Pain Points

The Need

Time to Conceive
46% 1-5 months
21% 6-12 months
24% more than 12 months

Category Entry Product: PMVS ...
59% ... to boost fertility
18% ... for planning / early pregnancy
10 % ... for total pregnancy
5% Add-ons (Probiotics, DHA, Iron)
4% ... for later pregnancy
1% ... for breastfeeding

Start Point for PMVS / Triggers
I started to use them when ...
26% ... we were not even trying to have a baby to boost my fertility
60% ... we decided to try to have a baby
16% ... when I went off birth control
15% ... I found out that I am pregnant

Motivations for PMVS Use - Baby / Mom
71% support my baby's healthy development
69% protect my baby from birth defects
62% enhance immune health of me & baby
62% support my body during breastfeeding
60% support breastmilk quality

Key Worries Unplanned Pregnancies
78% financial implications of raising a child
58% impact on mom's job / career
56% my own health
52% complications of a high-risk-pregnancy
52% impact on mom's life plans

Category Barriers of PMVS Non-Users
24% forget to take them regularly
24% too expensive
23% diet is sufficiently healthy
23% not relevant at my current stage
22% afraid of side effects on my body

Search Info

HCP	Consulted	Brand Reco	Elevit
GP	**24%**	**14%**	9%
Gynecologist	**16%**	**7%**	4%
Pharmacist	**16%**	**11%**	6%
Obstetrician	**15%**	**7%**	4%
Lactation Consultant	**3%**	**1%**	1%
Social Media Influencers	**5%**	**2%**	1%

HCP Reco

	% followed the reco	% satisfied with it (T2B)
GP	**75%**	**79%**
Gynecologist	**74%**	**78%**
Pharmacist	**70%**	**82%**
Obstetrician	**75%**	**85%**
Lactation Consultant	**64%**	**65%**

Online Info Sources Used **Ø1,8** hours online
14% search engine
14% product reviews
10% pregnancy & maternity sites
9% social media
9% brand website

Social Media Channels Used (n=79)
63% Instagram
53% Facebook
49% TikTok
43% YouTube
23% Reddit

Reach of Social Media Influencers

	Followed	Known
Australian Birth Stories	**19%**	**43%**
Steph Claire Smith	**12%**	**29%**
The Kick	**10%**	**24%**
Midwife Tylah	**9%**	**20%**
Dr. Tamara Hunter	**8%**	**21%**

Purchase

	Aware	Used p12m
Elevit	**86%**	**54%**
Swisse	**73%**	**17%**
Blackmores	**72%**	**31%**
Bioceuticals	**30%**	**4%**
Natalis	**22%**	**4%**

Brand Choice Drivers Elevit (n=486)
30% Reco by GP
28% Reco by family / friends
27% It is a trusted manufacturer
19% Reco by pharmacist
19% Previous positive experience

POS Behavior – Product Comparison
50% prices
36% brand reputation
30% price promotions
25% # of tablets / capsules
24% side effects

POS Interaction (n=773)
51% Picked up to read the pack
31% Spoke to pharmacist / asked for advice

Location - Place of Purchase
72% Pharmacy / drugstore
25% Supermarket / grocery store
18% Specialty supplement retailer
14% Online retailer

Pharmacy - Details (n=651)
76% Chemist Warehouse
25% Priceline / Priceline Pharmacy
14% Terry White
10% Local (on-site) independent pharmacy

Reasons for Channel Choice – Pharmacy (n=593)
65% convenient location
48% products are easy to find
45% cheaper than other channels
36% products usually on stock
35% wide selection of brands / products

Use

Most Often used brand
48% Elevit
23% Blackmores
11% Swisse
3% Bioceuticals
3% Natalis

Usage – Switching Behavior

	Planner	1st Trim	2nd Trim	3rd Trim	Post Partum
the brand	15	9	11	2	16
to bigger pack	**29**	**42**	17	11	18
to smaller pack	8	9	2	9	12
Neither	53	48	**70**	**77**	59

Reasons for Brand Switch (n=413)
20% Doctor reco
18% Friends, relatives reco
18% Price
17% couldn't find this at POS
15% Pharmacists reco

Last Purchase was an X Month's Supply

1	2	3	>3
31%	**33%**	28%	8%

Stopping Point / Category Exit
40% when I stop breastfeeding
30% as soon as doctot recommends it to me
14% when I go back to work
12% when I had my baby
9% as soon as I fall pregnant

Switch

Brand Satisfaction (T2B)
81% Elevit
85% Blackmores
78% Swisse
90% Bioceuticals
82% Natalis

Brand for Next Purchase?

	Considered	Rejected
Elevit	**50%**	**27%**
Blackmores	**31%**	12%
Swisse	**20%**	7%
Bioceuticals	**9%**	1%
Natalis	**6%**	1%

Brand Barriers Elevit

too expensive	**30%**
often out of stock	**13%**
different doctor reco	**13%**
not available	**11%**
diff. pharmacist reco	**11%**
no promotions	**10%**

Brand Barriers – Key Competitors

	Blackmores	Swisse	Bioceuticals	Natalis
too expensive	27%	21%	**49%**	24%
often out of stock	14%	14%	14%	11%
diff. doctor reco	15%	15%	20%	11%
not available	13%	10%	11%	13%
diff. pharmacist reco	9%	15%	10%	5%
no promotions	12%	**20%**	18%	9%

pain points
opportunity targets
click to go to deep dive section

Australian women look for advice and recommendations from like-minded in Social Media, seeking in-depth information, support and tips for best practices.

Hot Topics in Social Media

HCP / hospital recommendation and reviews

Finding a **good GP, OB** ignites several discussions, even more in the context of complicated journey, fertility support and miscarriage management. **Experiences with various fertility treatments** such as IVF, IUI are discussed and the importance of finding a good fertility specialist. **Recommendations for specific doctors**, clinics, and referrals from GPs are frequently mentioned.

Hi everyone, I'm in Melbourne and I'm looking for recommendations to the best fertility doctors for 40+ women. If you've had previous success and can recommend, please post bel

Mental support and educational resources

Women share their **current and past experiences to support each other,** esp. in the context of endometriosis, fibroids, fertility issues, IVF, unplanned pregnancy, chemical pregnancy / miscarriage (pregnant with chemical pregnancy / miscarriage personal or family history), gestational diabetes and postpartum preeclampsia. Also **book and podcast references** are welcomed for **further education.**

Sending love from Australia. Listen to IVF & fertility meditations on Spotify morning & night. Puts you in a good head space.

General dos and don´ts

Consumers often asked esp. when first pregnant for **guidance and rules** to follow. This includes diet and nutrition but also sports, **activities to avoid** as well as **contact with chemicals,** substances, drugs to banish

No alcohol. No drugs. No ibuprofen or aspirin. Don't get overheated- baths okay (as long as your whole body can go straight in without scorching, temp is fine), jacuzzis and sauna should be avoided. No cleaning cat poop or gardening without gloves. Get all my vaccines that are safe for pregnancy as soon as possible. Sex is okay but take it easy and if I bleed I am to stop. Avoid harsh cleaning chemicals (like oven and drain cleaner). Have a prenatal vitamin.

Diet, nutrition and role of PMVS

Special attention to **avoid risks of food poisoning** and adopt balanced diet according to body's need at different stages of the pregnancy and after post-partum esp. when breastfeeding.
The **relevance of VSM intake**: dealing with fatigue and anemia during pregnancy, **seeking recommendations** for VSM combinations, brands, products. Following supplements and dosages often discussed: calcium, vitamins D, folate/ folic acid, probiotics, iron/ ferritin, paying special attention to quality credentials such as made in Australia, natural form of nutrients vs. synthetic.

In Australia. I take a prenatal which includes iron & folic acid plus other things, vitamin D & calcium and DHAs

PMVS Journey by Stage (1/2)

	Planners				Post Partum	
	Fertility Boosting	**Fertility Issues***	**Trying to Conceive (TTC)**	**Pregnant Women**	**Breastfeeding**	**Other New Moms**
Volume Estimate – **Target Size** (natural fallout among all PMVS users in the market)	**28%**	**21%**	**16%**	**14%**	**20%**	**25%**
Volume Estimate – **PMVS Category Entry Point** for X% of the women	**32%**	**27%**	**18%** (planning, early preg supps)	**14%** (later + total preg supps)	**1%**	-
Target Profile	65% are under 35 yo 66% will be **FTMs** **59% are only trying for 1-5 months**	64% are under 35 yo 60% will be **FTMs** **42% tried for 12+ months** take Ø3,8 products/ actions to support fertility	50% 35+ 53% already have kids **Ø 4,7 fertility support actions** 80% started PMVS when they decided to try to have a baby 30% try for 12+ months	54% already have kids 29% started with fertility supps 54% **started PMVS** when they decided to have a baby, **34% only when pregnant**	54% have more than one child	49% 35+ 55% have more than one
Needs / Motivations	Highest for baby's needs: Support healthy development and avoid birth defects	more than half try a lifestyle and diet improvement More often want to compensate less healthy lifestyle previously	Highest for baby's needs + want to **support conception** find pregnancy & baby topic very important (47% TB)	Highest for baby's needs find pregnancy & baby topic very important (46% TB)	81% want to support baby's healthy development. 2 in 3 want to support breastmilk quality, quantity and support their body during breastfeeding (topbox)	**Least involved** (but still 28% find pregnancy & baby related topics still very important)
PMVS Usage	Higher use of probiotic supps, protein, amino acid, collagen and herbal supps 44% currently use **add ons** Buy mostly 1 -2 month supply	Higher use of probiotic supps, protein, amino acid, collagen, herbal supps and Myo-Inositol 49% currently use **add ons** Buy mostly 2 month supply	77% high use of **PMVS** (77%), Half use a supp for planning and early pregnancy **combined**, 33% only for planning Buy mostly 2 month supply	Highest use of **PMVS** (78%) followed by folic acids (59%) 23% buy a **>3 month supply**	Highest use of **iron** (76%) followed by PMVS Buy mostly 2-3 month supply	High use of **iron** (69%) followed by PMVS (61%) Buy mostly 2-3 month supply
Info Search	Cat entry is more often triggered by **WoM and ads** often use healthcare pages	**Most involved / active target:** blogs, apps, mom groups, social media (higher reach for Australian Birth stories & multiple other influencers)	Blogs, healthcare pages, AI tool Higher reach for Dr. Lynn Burmeister, Brooke Pitt	More often use AI tools to ask for info 19% did not seek any info prior to last PMVS purchase	Maternity sites & mom groups, Higher reach for Australian Birth Stories (30% following) 18% chose brand they used in **previous** pregnancy, 21% **did not seek any info** prior to last PMVS purchase	Lowest involvement of the partner (86% decide themselves) 19% did not seek any info prior to last PMVS purchase
Role of the HCP	92% go for **natural conception** 9% already froze eggs 24% know about a health condition or pre-disposition (mainly Endometriosis)	**Cat entry is more often triggered by gyn (28%)** 19% are in IVF treatment, 10% ovarian stimulation, 5% ICSI, 19% egg / 17% embryo freezing 38% health condition or pre-disposition (Mainly PCOS) **Strongly follow HCP advice, but only 75% satisfied with it**	Cat entry is more often triggered by gyn (28%) 19% are in IVF treatment, 17% ovarian stimulation, 4% ICSI 13% embryo / 11% egg freezing **55% health condition or pre-disposition (mainly PCOS)** 16% consult gyn prior to last purchase, 23% searched online	17% deferred from HCP reco in store e.g. due to price (vs. 9% total)	Only 7% consult lactation consultant (vs.28% GP) 16% deferred from HCP reco in store e.g. due to price (vs. 9% total)	8% consult lactation consultant (vs.24% GP)

*self-claimed

PMVS Journey by Stage (2/2)

	Planners				Post Partum	
	Fertility Boosting	**Fertility Issues**	**Trying to Conceive (TTC)**	**Pregnant Women**	**Breastfeeding**	**Other New Moms**
Role of Diagnostics / Apps / Devices	**Highest online search prior to last purchase (32%)**	46% use apps, 35% hormonal tracker, 44% ovulation tests, **Spend more than 2 hours each day online on these topics**	**Strong use of devices & apps:** 47% hormonal tracker, 50% fertility tests, 62% ovulation tests, but also: 77% PMVS High online search (32%)	Low use of apps for PMVS info search in current stage Half used diagnostics to support fertility: apps, fertility & ovulation test(s)	Low use of apps for PMVS info search in current stage Half used diagnostics to support fertility: apps, fertility & ovulation test(s)	Low use of apps for PMVS info search in current stage Half used diagnostics to support fertility: apps & ovulation test(s)
Purchase Channels	Stronger drivers: staff assistance,	**20% buy online (2 in 3 on their phone)** Stronger drivers: convenience, cheaper prices, reviews, ads		Less often ask pharmacists / sales person for advice	**20% buy online, ordering mostly on their phone**	Stronger drivers: **home delivery**
Brand Choice drivers	**Brand reputation**	**Brand reputation, format**	**Format**	GP, WoM, **ads**	**Active ingredients**	GP, WoM, positive experience
	Elevit is the strongest brand across stages, but also: rejected by 1 in 4 women					
Elevit vs Competition – Differences by Stage	Higher awareness of& consideration for **JS Health**, use of & consideration for **Swisse**	Higher use of **Swisse** More often buy Elevit due to ads they saw	Higher awareness of **JS Health, FabFol** Higher consideration for **Nature Made** More often **dislike taste & format of Elevit**	**Higher awareness of NaturoBest, use of Natalis** More often buy Elevit due to **ads** they saw	**Higher awareness for Blackmores (but: rejected by 17% due to price or doctor reco),** Kin, Qiara, use of Natalis More often buy Elevit when reco by GP or they have positive experiences with it (highest satisfaction: 47% completely, on par with Blackmores) More often note Elevit being out of stock (20%)	Highest awareness and use of Elevit, Blackmores, Kin, Qiara Higher consideration for **Blackmores** **More often note Elevit being too expensive (41%)**
Frequency & Rationale for Switching in this Stage	**45%** (mainly to a larger pack, 11% switched brands)	**49%** (mainly to a larger pack, 18% switched brands) 21% due to side effects	**47%** (mainly to a larger pack, 18% switched brands) 18% tablets/capsules too big **Most open to switch brands from time to time**	**35%** (mainly to a larger pack, 7% switched brands) 20% saw **no clear effect**	**37%** (mainly to a larger pack, 14% switched brands) 20% unsure if product was **suitable** during breastfeeding	**41%** (mainly to a larger pack, 18% switched brands) 23% say their PMVS was no longer needed in current stage

Opportunity Target: Millennial Moms 35+ („Geriatric Pregnancies“)

	Gen Z Moms	Millennial Moms 35+
Category Entry Point for X% of the women	59% fertility supps More often started when they **went off birth-control** (18% vs. 12%) More often **encouraged by friends / family** **Fall pregnant more quickly** (52% within 5 months vs. 38%) – average 0,7 years to fall pregnant 43% FTM (vs. 26%)	60% fertility supps More often started when they **decided to try to have a baby** (64% vs. 57%) Average **1,1 years to fall pregnant** 74% already have kids (mostly 1-2)
Needs / Motivations	**90% natural conception**, but still: 42% experienced fertility issues Feel more supported (29% vs 20%) More often suffered from morning sickness	80% natural conception, 43% experience fertility issues: - 16% **IVF** (vs. 7%), 14% embryo freezing - 59% **fear of not getting pregnant** (vs. 49%) - 53% **age-related fertility concerns** (vs. 17%) But also other worries higher: **financial, physical, emotional** 33% consulted a **fertility expert** (vs. 22%) Higher use of fertility supps (54%) and PMVS in fertility stage (75%) **Stronger motivations** around baby's needs as well as breastmilk quantity
Fertility Journey	Fertility issues more often rooted in a **health condition** (43% vs. 31%) – mainly PCOS	**Fertility issues** more often rooted in **longer TTC period** (50% not aware of health condition vs. 30%)
Info Search	Friends & Family as well GP most important info source (and reason for brand switch, followed by preferred being out of stock) **2 hours / day online** with pregnancy-related contents, 42% find the topic "very important" More often **search online** (31% v. 20%) – **product reviews, maternity sites, social media, blogs, influencers, online ads**	Friends & Family as well GP most important info source (and reason for brand switch, followed by preferred being out of stock) **Spend 1.7 hours / day consuming pregnancy-related content online, 40% find the topic "very important"**
	Similarly high use of diagnostics & devices in fertility stage	
Role of Diagnostics / Apps / Devices	Mainly **Instagram** (67% of social media use), followed by TikTok & Facebook Higher reach of **midwife influencers**	High reach of **Podcasts**: 40% aware of "Australian Birth Stories", 23% aware of "The Kick" 75% of online shoppers **use their phone to buy (vs. 70%)**
Purchase Channels	Main channel is the pharmacy (69%), 29% buy in **supermarket**, 14% online **Pharmacist = higher brand barrier for Elevit** (13% reco for another brand vs. 7%)	77% buy in pharmacies (due to convenient location, findability of products and cheaper prices), 14% online
Brand Choice	Mostly follow HCP reco (67%), but **22% switch at POS** (vs. 13%) At POS: 51% compare prices, 27% look at **side effects** (vs. 19%) 19% **decide** which brand to buy **in store** (vs. 11%), **triggered by ads** in pharmacy (8% vs. 4%) 13% **like changing brands** from time to time (vs. 7%) **Higher involvement of the partner** (20% decide together vs. 13% among millennials) Higher awareness & use of nature made	Higher use of **folic acids & ConEnzyme Q10** p12m Higher **awareness & use of Elevit** (92% vs. 83%) as well as consideration and awareness of **Bioceuticals** (more often promoted by **pharmacists**) 74% follow HCP reco **More satisfied with GP & pharmacists reco** 68% knew which brand they would buy (vs. 59%) At POS: 49% compare prices, 15% **do not compare anything**
	Elevit is the strongest brand, they are highly satisfied and would recommend it to others	
Elevit vs Competition	Even higher use of Elevit 1 Pre&Early Preg (90% vs. 83%), **chose Elevit due to WoM or GP** Swisse: more often reco by friends, Blackmores: as substitute when their brand out of stock **20%** agree to none of the image statement for Elevit (vs. 12%) – **no clear image** (yet)	Clearly **more positive brand image for Elevit**
Right to Win for Elevit	**Online visibility (also among partners), ads in pharmacy**	**HCP detailing, considering portfolio addition of fertility issue specific SKU**

Information about medical and health implications of late pregnancies are as relevant as emotional stories of success – only the term ‘geriatric’ is disapproved.

Late (geriatric) pregnancies in Social Media

General topics and terms

A recurring topic: many discussions revolve around **difficulties of conceiving later in life**, including use of **fertility treatments** like IVF, IUI, and importance of **consulting fertility specialists**. There are also mentions of the **emotional and financial toll** of these treatments. Users struggle with the **official terminology** of “geriatric” pregnancy, perceived as **highly stigmatizing** but common in Australia. However, AMA (advanced maternal age) appear to be an alternative terminology used by HCP for women after 35**.**

Implications, risks and testing

Specific **testing and monitoring needs** due to increased risks associated with geriatric pregnancies are widely discussed, like fertility blood tests, IVF, donor eggs, risk assessment and monitoring of high-risk-pregnancy via tests such as NP scan/ NIPT/ amnio synthesis, earlier induced DOB (Date Of Birth) perceived as commonly going along with frightening C-section
A special focus on NIPT (noninvasive prenatal testing) considering factors like cost (approx. AUS$ 400,-/ 500,-), emotional impact, and potential outcomes and abortion implications of the test.

*Medical professionals in Australia called mine a "geriatric pregnancy" at not quite 37 🥲 ...
I think 35+ is considered ‘advanced maternal age’ in Australia (also an Aussie) however that doesn’t automatically make you high risk*

It (NIPT) is optional here in Australia but due to my advanced maternal age I decided to do it. I didn't for my first child 9yrs

Empowering success stories

Seeking **personal experiences from peers**, for both, trade-offs considerations and reassurance. **Age limit** is often a topic, along the **success story of conceiving/ giving birth later in life,** e.g. examples from close family members and friends, to spread mental support and **encourage women** to continue their journey. They are a lot of personal accounts of women and HCP sharing success stories, often after multiple miscarriages or rounds of IVF.

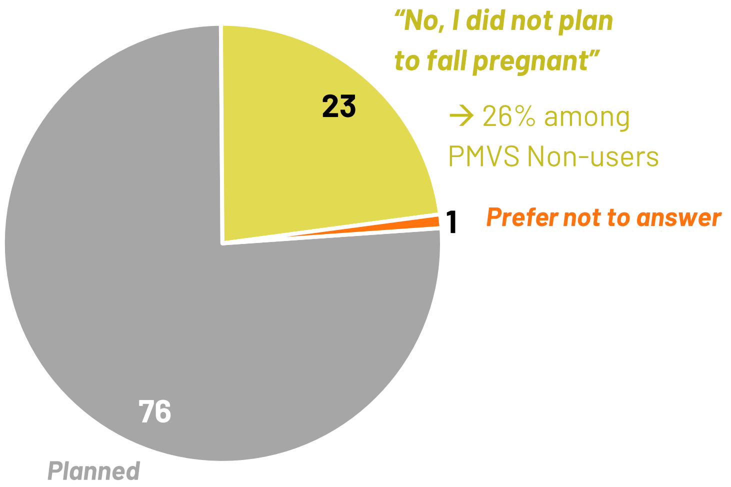
Opportunity Target Unplanned Pregnancies

	Planned Pregnancies	Unplanned Pregnancies
Target Size (% of PMVS users by natural fallout)	**76%**	**23%**
Category Entry Point for X% of the women	43% enter the category with **fertility supps**, 34% planning supps Higher **use of PMVS** p12m (73% vs. 57%)	29% enter the category with fertility supps, 25% pregnancy supps, 23% planning
Needs / Motivations	41% experienced **fertility issues** (vs. 31%), key fertility worries: - **Fear of not getting pregnant** (59% Top Box) - **Emotional toll** of multiple rounds of treatment (35%)	**64% natural conception** without fertility issues (vs. 55%), key fertility worries: - **Financial implications** (46% Top Box) - Impact on my **career** 29% - **Health of the baby** 26% - Complications due to a **high-risk pregnancy** 26%
Info Search	30% listened to a **podcast** in fertility stage, 20% bought a **book**	Top 3 info sources: 51% talked to **friends/family**, 50% consulted a GP, 33% researched online
Role of the HCP	69% **consulted a GP in fertility stage** (82% any HCP net)	14% Have not consulted a doctor in fertility stage 30% consulted a **midwife**
Role of Diagnostics / Apps / Devices	Higher usage of **specific products/solutions**: 53% used an app in fertility stage (32% hormonal tracker), 42% fertility test, 60% ovulation tests	**Lower usage** of products/solutions: 44% digital apps, 39% ovulation test, 25% fertility test, 17% hormonal tracker
Purchase Channels	No sign. differences between **purchase channels**; **#1 Pharmacy/drugstore** (ca. 70%), esp. Chemist Warehouse	
Role vs. Competition	Higher use of **Elevit Pre-Conception** (84% vs. 73%) Usage p12m: higher for **Blackmores** (38% vs. 25%) Main barrier to use Elevit: too expensive (32%)	Usage most often: higher for **Elevit** (55% vs. 43%) But also: Higher share of **rejectors of Elevit** (41% vs. 22%) Main barrier **too expensive** even higher (54%)
Switching Behavior		Main reason for switching: esp. reco by **pharmacist** (30% vs. 10%)
Right to Win / Grow	**HCP detailing since GPs are key gatekeeper, starting in fertility stage**	**Price positioning & promotions are vital**

Women who fell pregnant unexpectedly are worrying a lot about their financial situation.

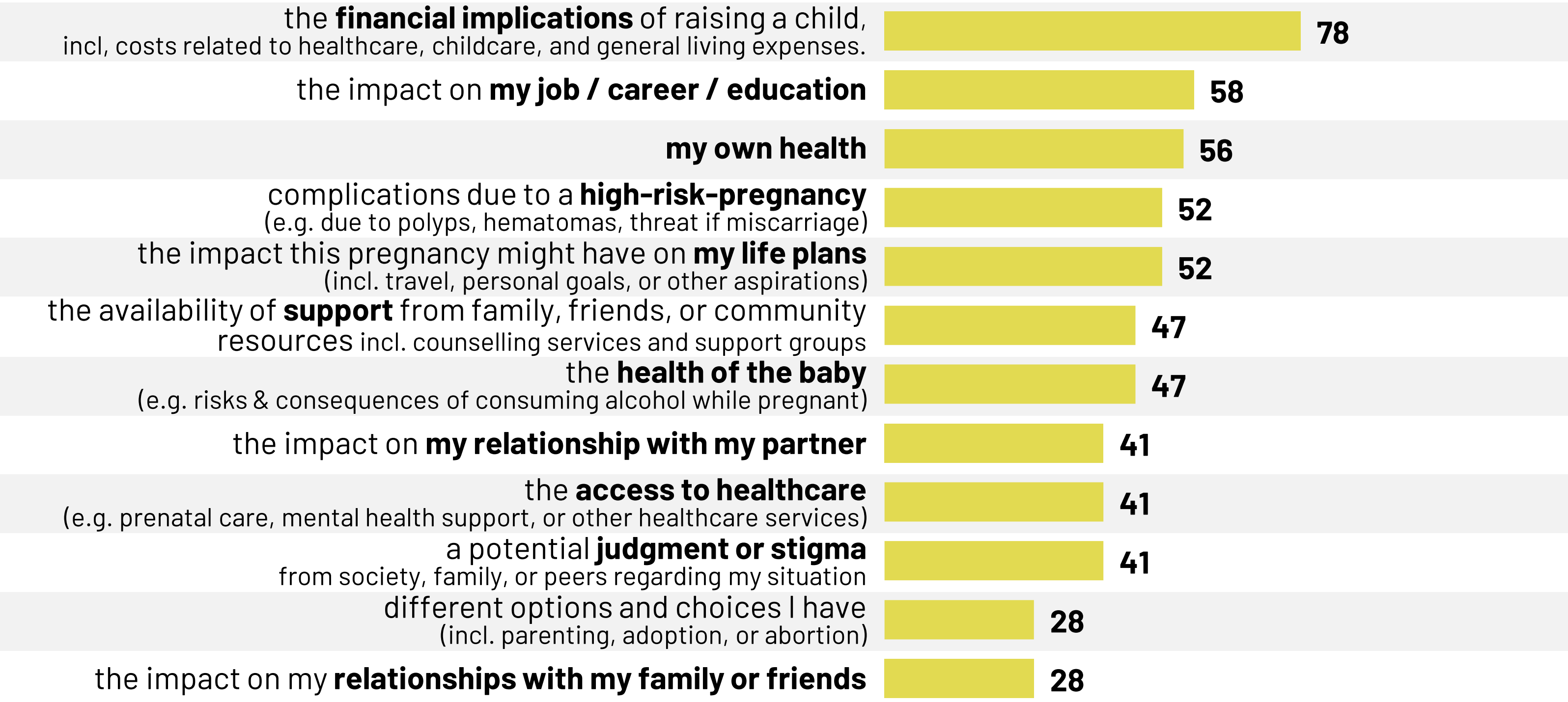
Opportunity Target – Unplanned Pregnancies

Share of Unplanned Pregnancies



Key Worries Unplanned Pregnancies (Top2Box Agreement)

I am worried / concerned about…



Results in %
Base: All respondents AUS, n=489, unplanned pregnancies AUS: n=111
S8: Did you plan to fall pregnant beforehand?,
S8a: Below you find different worries or concerns women noted in the context of unplanned pregnancies. Please indicate in how far they are describing your personal situation.

A high rate of unplanned pregnancies and resulting abortions require actions for prevention and support for affected families.

Unplanned Pregnancies in Social Media

High rates of unplanned pregnancies and abortions

Bad economic circumstances like financial insecurity/concerns, housing/ cost of living crisis and homelessness risk **reduce willingness to have children**. Reports say that about half of all pregnancies are unplanned and a significant portion ends in abortion.
The fact that most unplanned pregnancy are not carried to term might explain why users **do not talk about taking supplements** prior to the pregnancy or during the early stages before knowing they were pregnant.

> *It is estimated that half of all pregnancies in Australia are unplanned and that half of those are terminated; also that between one quarter and one third of Australian women will experience an abortion in their lifetime.*

Social stigma, financial issues and health implications

Particularly for the **young and low educated** pregnancy can mean a significant disruption of life and career plans leading to **long-term economic disadvantages and struggles**
A lot of posts emphasizing differences between social classes and regional areas.
There is a prevalent **lack of sympathy** and judgment towards individuals who choose to carry unplanned pregnancies to term, often leading to **social isolation and mental health issues**.
In this context (albeit on a more marginal occurrence), **FASD** and the risks are discussed and explained – as mothers may not be aware of their pregnancy when consuming alcohol.

> *Majority of unplanned pregnancies are from casual/dating app hookups that have gone wrong. I have very little sympathy for most who chose to have a baby when they have no money and no future prospects already.*

Education for better family planning and budgeting

Regarding the circumstances, there is a clear need for **better family planning and support** systems to improve the Australian birth rate, e.g. tutorial in order to financially plan a pregnancy.

Most of the women have used vms before. Less than 1 in 3 think it is reasonable to take PMVS before falling pregnant. High prices and lack of compliance are main category barriers.

Opportunity Target PMVS Non-Users

Previous Category Usage

n=100

VMS NET	79
Multivitamins and/or multi-mineral supplements	56
Single letter vitamin supplements like Vitamin C, D, B, etc.	49
Single mineral supplements like magnesium, calcium, omega, collagen	37
Other products like probiotics, herbals, proteins etc.	31
None of the above	16

Category Barriers – Top 5

n=100

I usually **forget** to take these types of products regularly	24
They are **too expensive**	24
My **diet** is sufficiently **healthy**	23
I don't think they are **relevant** at my current stage of the journey	23
I am **afraid of side effects** or reactions on **my body**	22
No one around me **recommended** this product	21
I **don't have a habit** of taking supplements in general	18
I **do not need them**	17
I am afraid of **side effects** or reactions **on my baby**	16
They are **artificial** / not natural	16

	Previous Brand Usage	Satisfaction T2B
	n=79	n=74
Blackmores	49	72
Swisse	47	76
Nature's Own	41	78
Hydralyte	38	77
Nature's Way	37	69
Berocca	**34**	**81**
Redoxon	**3**	*low base*

Reasonable Usage Periods of PMVS

n=100

TTC	More than 1 month before TTC	30
	A month before TTC	23
	At the same time when starting TTC	31
Pregnancy	During 1st trimester	40
	During 2nd trimester	36
	During 3rd trimester	27
Post Partum	When breastfeeding	21
	Post Partum, not breastfeeding	9
	None of the above	16

Results in %, Base: All Non-User AUS, Non-Category Users with previous category usage, S01: Independent from your current pregnancy journey, have you ever used any of the following products before? / S02: Which of the below products have you ever used? / S03: To what extent were you satisfied or unsatisfied with the following brands that you used before? / S05: Do you agree to any of these statements? / S06: During which periods do you consider the usage of nutritional pregnancy supplements reasonable?

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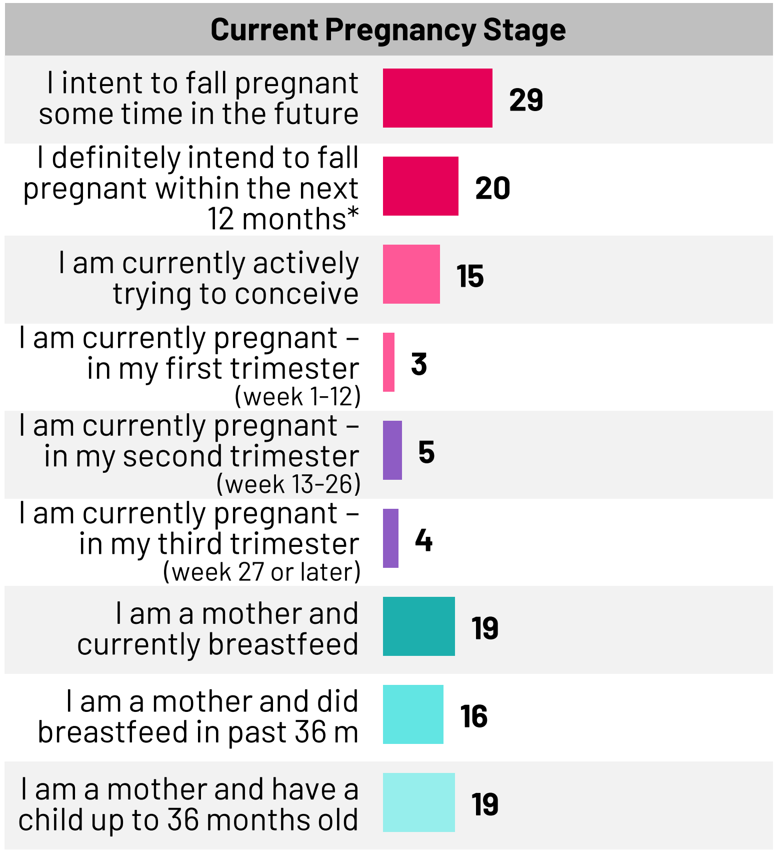
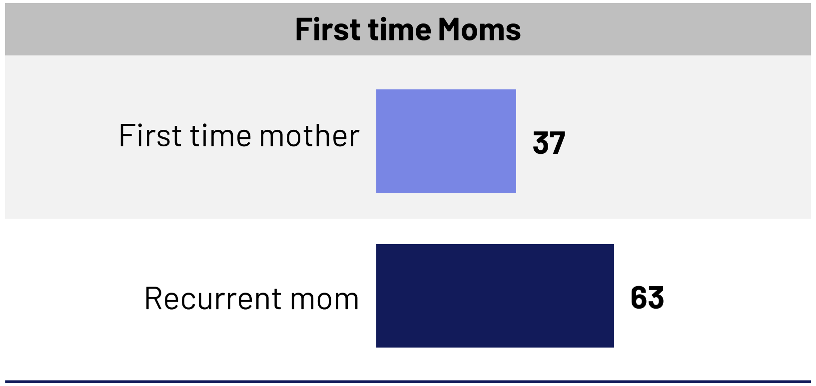
AUSTRALIA

The PMVS Category

The Pregnancy Journey in Australia

Sample Composition





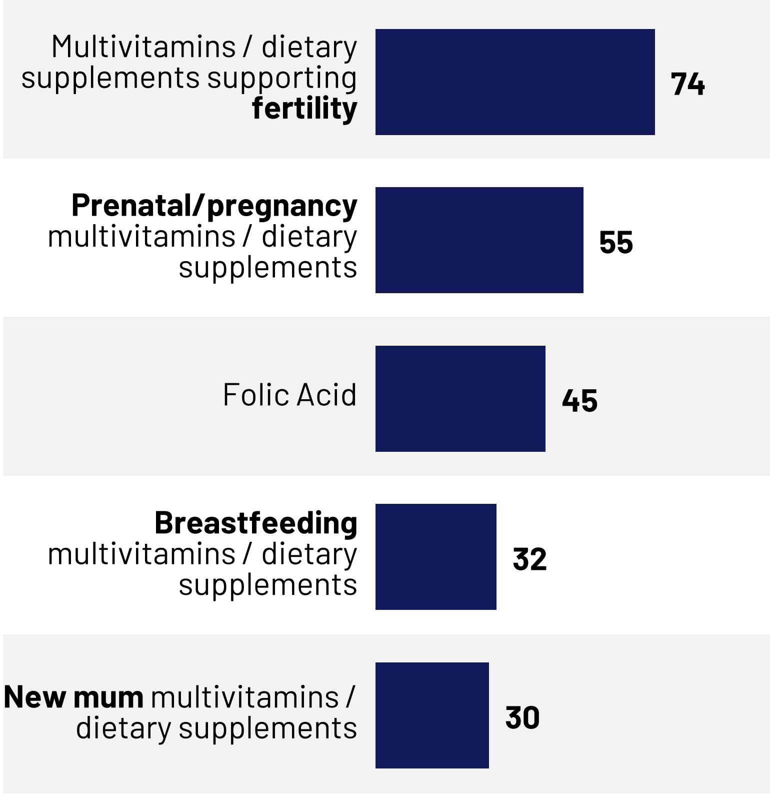
No. of Children (n=672)	
One	49%
Two	36%
Three	10%
Four or more children	5%

Results in %, * provided that there are no significant changes in my life that prevent me from doing so
Base: All respondents, n=1.000 AUS
S6: You mentioned you ... . Will this be/Is this your first child? / S7: How many biological children do you have? / S5: Which of the following applies to you?

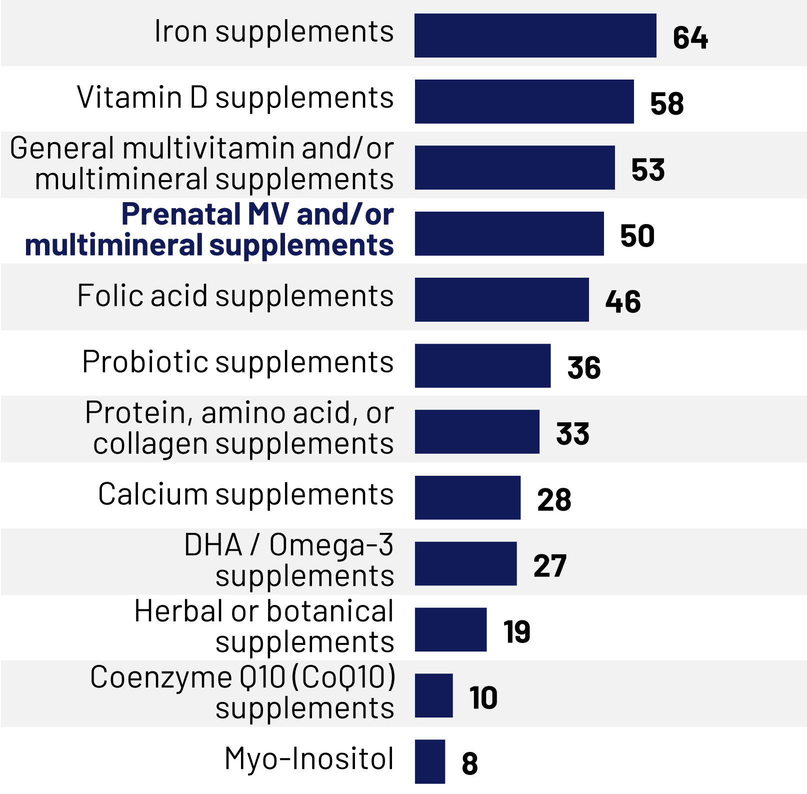
The Australian PMVS Users

Sample Composition PMVS Users

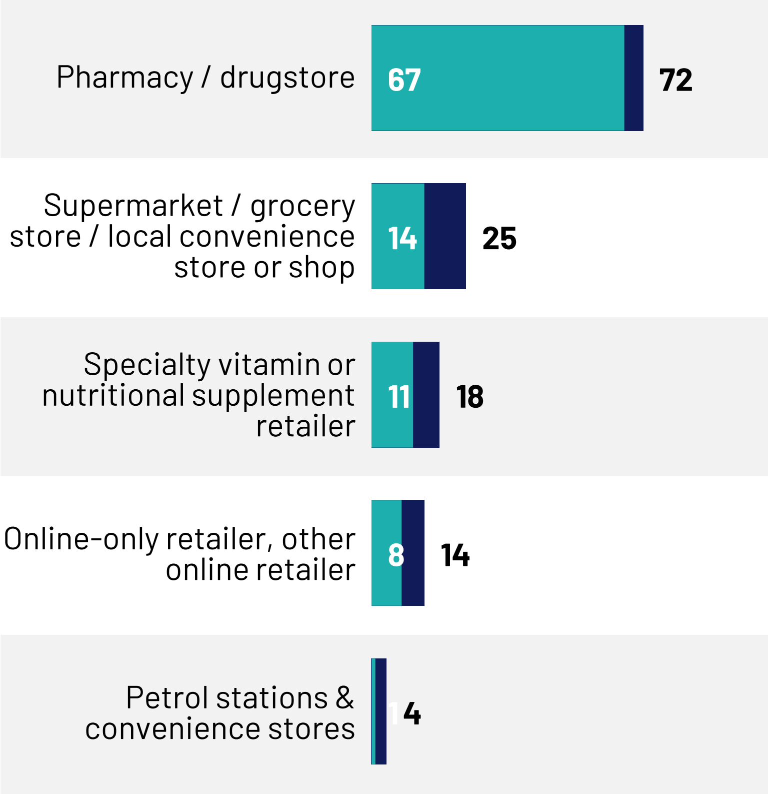
Category Usage p12m



Category Usage p12m – Zoom In



(Preferred) Purchase Channel for PMVS



Results in %
Base: All respondents, n=901 AUS
S4: Which of the following types of products have you used in the past 12 months? / S4a: And which of the below product types did you use exactly? / Q12: From which of these places did you get your CATEGORY? / Q12c: And where do you prefer to buy your CATEGORY?

2 in 3 women taking PMVS also took iron and more than half of the PMVS users also took a folic acid in the past 12 months.

Zoom-In on Category Usage Past 12 Months – Cross Use

	Iron supplements	Vitamin D supplements	General MV and/or multimineral supplements	Prenatal MV and/or multimineral supplements	Folic acid supplements	Probiotic supplements	Protein, amino acid, or collagen supplements	Calcium supplements	DHA/ Omega-3 supplements	Herbal or botanical supplements	Coenzyme Q10 (CoQ10) supplements	Myo-Inositol
	n=580	n=523	n=480	n=452	n=410	n=325	n=300	n=252	n=240	n=170	n=93	n=70
Iron supplements	100	69	66	66	72	67	69	73	70	68	69	64
Vitamin D supplements	62	100	63	55	60	65	64	76	75	65	78	66
General MV and/or multimineral supplements	55	58	100	49	51	68	62	62	66	62	59	50
Prenatal MV and/or multimineral supplements	52	48	46	100	63	48	45	45	51	41	61	53
Folic acid supplements	51	47	44	57	100	48	45	56	53	43	66	51
Probiotic supplements (NOT including yogurt)	38	40	46	35	38	100	55	48	55	56	61	41
Protein, amino acid, or collagen supplements	36	37	39	30	33	51	100	44	51	60	42	51
Calcium supplements	32	37	32	25	35	37	37	100	45	39	34	36
DHA / Omega-3 supplements	29	34	33	27	31	41	41	43	100	35	62	47
Herbal or botanical supplements	20	21	22	15	18	30	34	27	25	100	30	33
Coenzyme Q10 (CoQ10) supplements	11	14	11	13	15	18	13	13	24	16	100	34
Myo-Inositol	8	9	7	8	9	9	12	10	14	14	26	100

Results in %
Base: All respondents, PMVS users p12m AUS
S4: Which of the following types of products have you used in the past 12 months? / S4a: And which of the below product types did you use exactly?

Only 40% of new moms not breastfeeding take specific supplements for their stage.

Zoom-In on Category Usage Past 12 Months by Stage

Supplements supporting	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
	n=248	n=185	n=142	n=123	n=177	n=229
Fertility supps	77	81	77	69	60	70
Prenatal/pregnancy supps	40	46	69	86	72	63
Breastfeeding supps	22	23	16	38	79	54
New mum supps	24	32	23	32	56	40
Folic Acid	38	42	44	59	58	48

Results in %
Base: All respondents, PMVS users p12m AUS
S4: Which of the following types of products have you used in the past 12 months?

3 in 4 pregnant women took PMVS while iron, vitamin D and general VMS are the mainly used products in fertility boosting stage.

Zoom-In on Category Usage Past 12 Months by Stage

	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
	n=248	n=185	n=142	n=123	n=177	n=229
Iron supplements	59	62	65	62	76	69
Vitamin D supplements	60	61	58	53	53	58
General MV and/or multimineral supplements	61	54	56	42	47	53
Prenatal MV and/or multimineral supplements	38	38	59	78	71	61
Folic acid supplements	38	41	47	59	58	50
Probiotic supplements (NOT including yogurt)	42	43	39	27	32	36
Protein, amino acid, or collagen supplements	40	43	32	21	28	28
Calcium supplements	27	29	29	24	29	30
DHA / Omega-3 supplements	25	30	31	28	24	24
Herbal or botanical supplements	21	25	20	12	17	13
Coenzyme Q10 (CoQ10) supplements	9	13	13	11	9	7
Myo-Inositol	4	12	13	7	6	5

Results in %
Base: All respondents, PMVS users p12m AUS
S4a: And which of the below product types did you use exactly?

Only 3 in 4 pregnant Elevit users claim to use PMVS – while 1 in 4 do not identify Elevit as a PMVS – even higher in the other stages.

Zoom-In on **Elevit Users -** Category Usage Past 12 Months by Stage

elevit Users in	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
	n=129	n=95	n=80	n=68	n=97	n=115
Iron supplements	52	62	70	59	74	70
Vitamin D supplements	62	64	65	57	53	63
General MV and/or multimineral supplements	60	56	56	40	46	50
Prenatal MV and/or multimineral supplements	45	38	68	76	67	61
Folic acid supplements	42	39	51	71	64	55
Probiotic supplements (NOT including yogurt)	38	46	45	28	22	35
Protein, amino acid, or collagen supplements	40	47	35	15	24	23
Calcium supplements	22	35	34	21	27	30
DHA / Omega-3 supplements	23	29	35	25	15	23
Herbal or botanical supplements	17	31	20	13	13	11
Coenzyme Q10 (CoQ10) supplements	6	14	14	10	8	6
Myo-Inositol	5	7	14	6	2	3

Results in %
Base: All respondents, PMVS users p12m AUS
S4: Which of the following types of products have you used in the past 12 months? / S4a: And which of the below product types did you use exactly?

Elevit is the strongest brand among users of different PMVS product types. Women taking Coenzyme Q10 more often used Bioceuticals and Natalis. Those looking for calcium or DHA more often used Swisse.

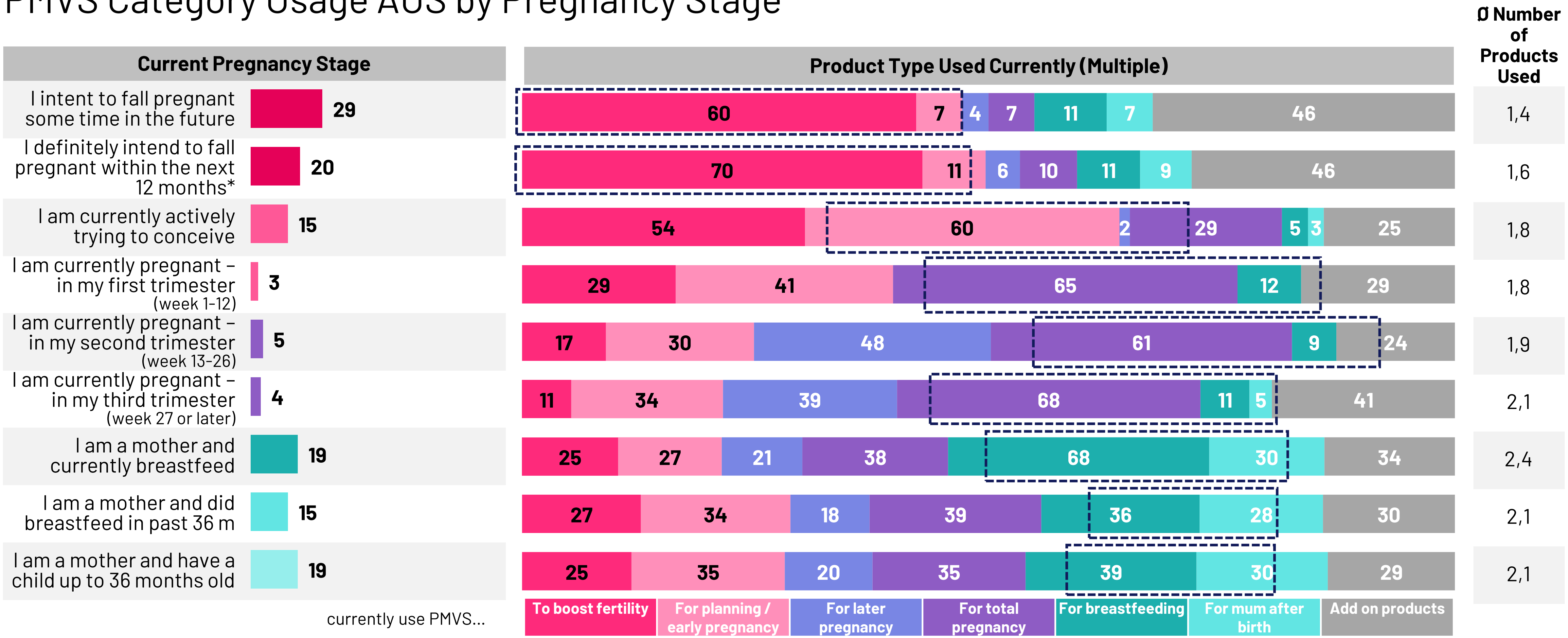
Brand Usage by Product Type Users

	Iron supplements	Vitamin D supplements	General MV and/or multimineral supplements	Prenatal MV and/or multimineral supplements	Folic acid supplements	Probiotic supplements	Protein, amino acid, or collagen supplements	Calcium supplements	DHA/ Omega-3 supplements	Herbal or botanical supplements	Coenzyme Q10 (CoQ10) supplements	Myo-Inositol
	n=580	n=523	n=480	n=452	n=410	n=325	n=300	n=252	n=240	n=170	n=93	n=70
elevit	53	57	54	57	59	54	52	53	51	51	49	47
Blackmores	33	30	32	36	35	32	32	33	33	28	32	33
Swisse	19	20	18	11	15	18	23	27	25	19	22	17
Bioceuticals	4	5	5	5	6	7	5	4	5	7	15	9
Kin	4	2	3	5	5	4	4	2	3	5	6	7
Nature Made	4	4	4	1	2	2	5	5	3	5	2	0
Natalis	4	4	3	6	5	2	3	2	4	4	12	4
Life Space	3	3	3	4	3	6	4	4	5	4	4	6
NaturoBest	3	3	3	4	3	4	3	4	4	4	3	6
JS Health	2	2	3	1	1	3	4	2	2	3	1	1

Results in %
Base: All respondents, PMVS users p12m AUS
B6: Which of the following brands of ... have you used in the last 12 months? / S4a: And which of the below product types did you use exactly?

2 in 3 pregnant women in Australia claim to use a product for “total pregnancy”.

PMVS Category Usage AUS by Pregnancy Stage



Results in %, * provided that there are no significant changes in my life that prevent me from doing so
Base: All respondents, n=901 PMVS users p12m AUS
S5: Which of the following applies to you? / Q1_1: Thinking of your current pregnancy journey, please select all the products you have used so far – from the start of your pregnancy journey up to now? Answers shown for: currently

Elevit is the strongest brand across pregnancy stages. Swisse is primarily used in fertility stages and Blackmores peaks in TTC and postpartum.

Brand Used in the Past 12 Months by Stage

	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
	248	185	142	123	177	229
elevit	52	51	56	55	55	50
Blackmores	29	26	35	30	36	36
Swisse	19	19	16	12	9	15
Bioceuticals	4	5	6	2	3	5
Natalis	4	4	2	7	7	5
Megafol-9	2	4	5	3	6	6
Kin	1	3	3	5	5	4
Life Space	4	3	2	2	1	1
Qiara	2	3	3	-	5	4
FabFol	1	1	3	2	1	2
Nature Made	2	2	2	4	5	4
NaturoBest	4	4	3	2	2	3
JS Health	1	4	1	2	1	1
Ovitae	1	2	2	2	1	2
Bio Island	1	1	-	2	1	-

Results in %, !small base
Base: All respondents, PMVS users p12m AUS
B6: Which of the following brands of ... have you used in the last 12 months?

Half of the PMVS users have taken Elevit – usage levels are consistently high over the pregnancy journey stages.

Brand Used in the past 12 months / SKU Usage p12m Elevit by Stage

	Total (n=900)	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
		n=248	n=185	n=142	n=123	n=177	n=229
elevit	54	52	51	56	55	55	50
Pre-Conception & Pregnancy	47	47	49	53	46	44	41
Elevit Breastfeeding	12	8	9	8	2	36	25
Morning Sickness Relief	6	5	4	5	4	1	2
Elevit DHA & Choline Pregnancy	5	6	4	4	2	7	4
Menevit	4	3	4	6	8	3	2
Elevit Probiotics	4	3	7	8	7	8	5
Blackmores	31	29	26	35	30	36	36
Swisse	17	19	19	16	12	9	15
Bioceuticals	4	4	5	6	2	3	5
Natalis	4	4	4	2	7	7	5
Kin	4	2	4	5	3	6	6
NaturoBest	3	1	3	3	5	5	4
Nature Made	3	4	4	3	2	2	3
Life Space	3	2	2	2	4	5	4

Results in %
Base: All respondents, n=901 PMVS users p12m AUS
B6: Which of the following brands of ... have you used in the last 12 months? / Q31: Of the brands of ... you used in the past 12 months which products did you use exactly?

Elevit users are most loyal (only 16% also tried Blackmores, 9% Swisse) while 1 in 3 key competitor users has also used Elevit p12m.

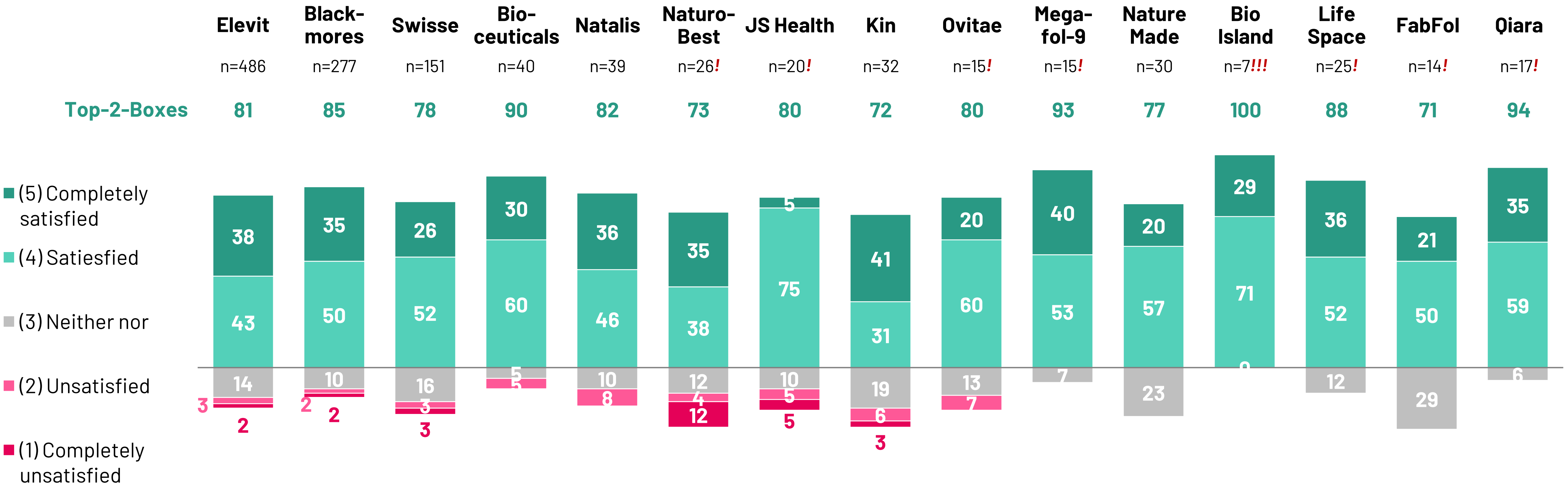
Brand Used in the Past 12 Months – Cross Use

	elevit	Blackmores	Swisse	Bioceuticals	Natalis	Kin	Nature Made
	n=486	n=277	n=151	n=40!	n=39!	n=32!	n=30!
elevit	100	29	28	33	33	22	17
Blackmores	16	100	29	33	10	13	20
Swisse	9	16	100	18	10	6	23
Bioceuticals	3	5	5	100	8	0	7
Natalis	3	1	3	8	100	0	0
Megafol-9	2	1	1	0	3	6	3
Kin	1	1	1	0	0	100	0
Life Space	1	3	1	10	0	3	7
Qiara	1	1	1	5	0	6	0
FabFol	1	0	1	3	0	13	0
Nature Made	1	2	5	5	0	0	100
NaturoBest	1	0	1	0	3	9	0
JS Health	1	1	1	8	3	0	0
Ovitae	1	1	3	8	5	3	0
Bio Island	1	0	1	3	3	3	0

Results in %, !small base
Base: All respondents, PMVS users p12m AUS
B6: Which of the following brands of ... have you used in the last 12 months?

1 in 3 Elevit users is completely satisfied with the brand – none of the key competitors is stronger.

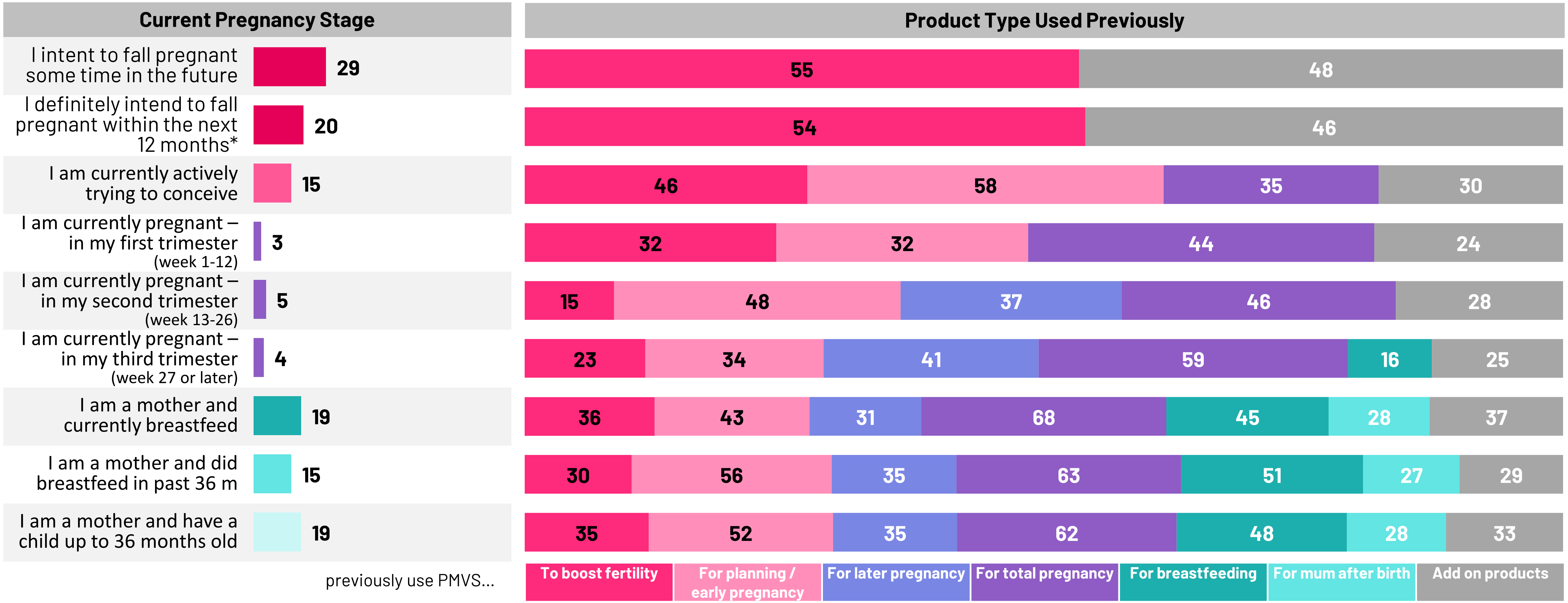
Brand Satisfaction



Results in %, ! small base, !!! very small base
Base: Brand users p12m
Q27: To what extent are you satisfied or unsatisfied with each of the following brands of ... that you used in the past 12 months?

2 in 3 women in stage 3 have used a stage 2 / pregnancy supplement previously.

Moving through the Stages



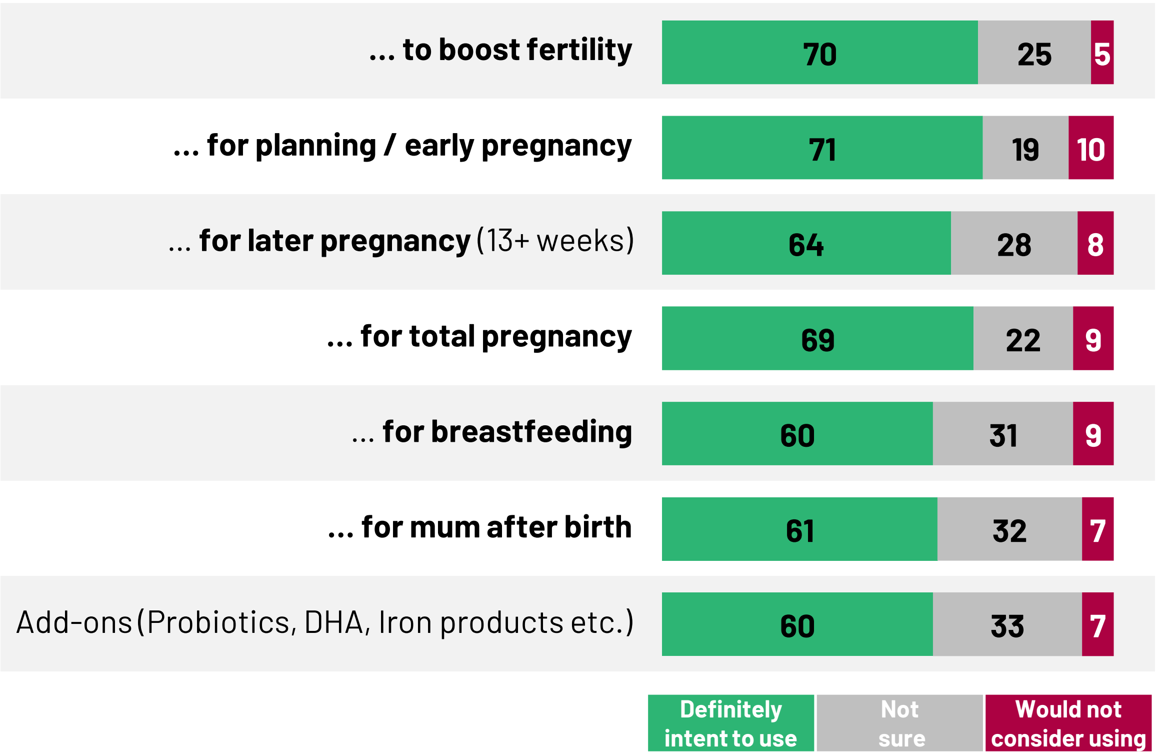
Results in %,
Base: All respondents, n=901 PMVS users p12m AUS
S5: Which of the following applies to you? / Q1: Thinking of your current pregnancy journey, please select all the products you have used so far – from the start of your pregnancy journey up to now? Answers shown for: previously

Most Australian women intend to use PMVS until stage 3 and plan to stop after breastfeeding / going back to work. 1 in 3 would follow their doctors reco to stop.

Category Exit Point

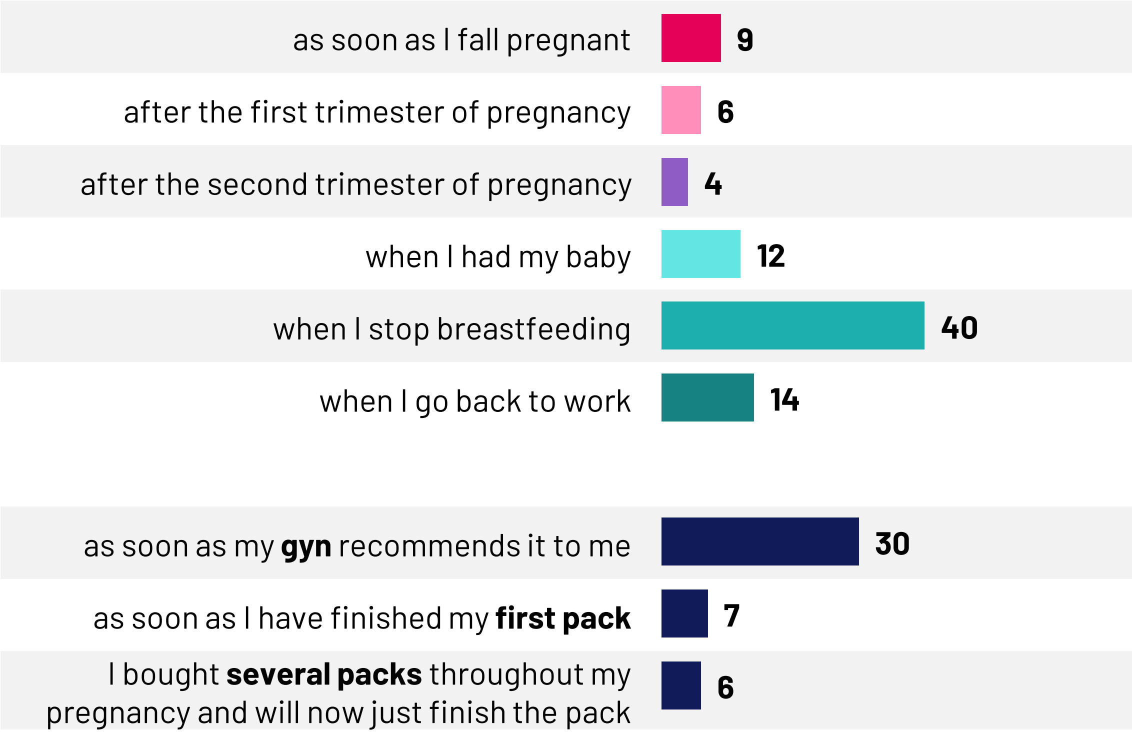
Future Product Use Consideration

nutritional pregnancy supplements ....



Stopping Point

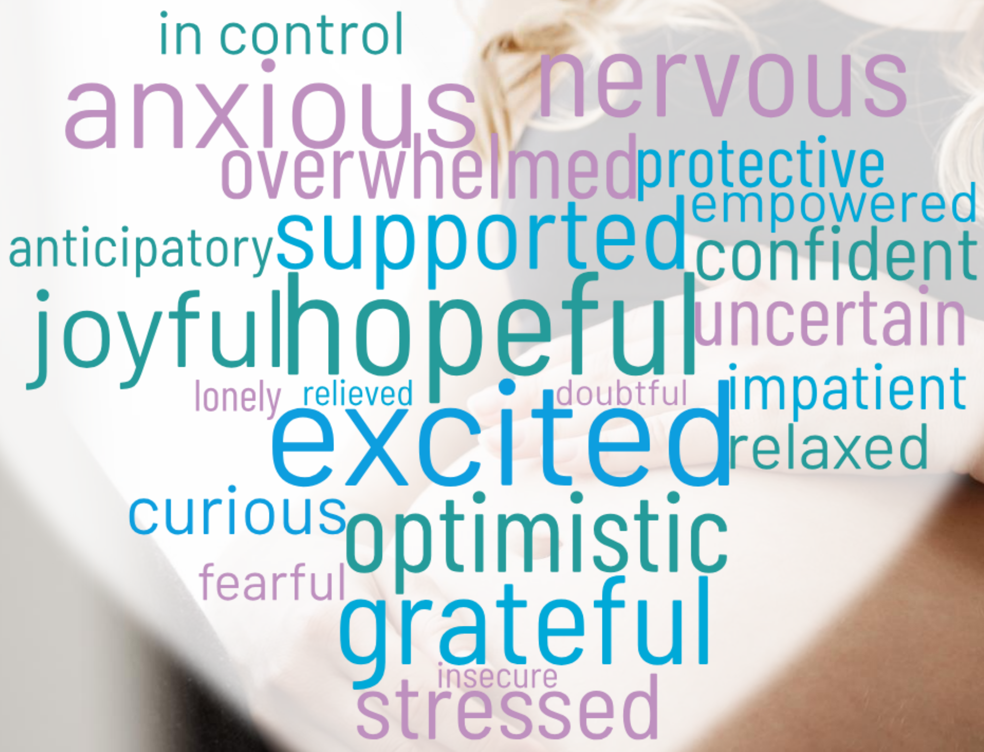
I plan to stop using PMVS...



Results in %,
Base: All respondents, n=901 PMVS users p12m AUS
Q36: Thinking about the weeks and months ahead, do you already know which products you plan to use?, Q37: At which point do you plan to / would you stop using any nutritional pregnancy supplements?

How does she feel?

Emotional Factors



Hopeful
Excited
Nervous
Anxious
Optimistic

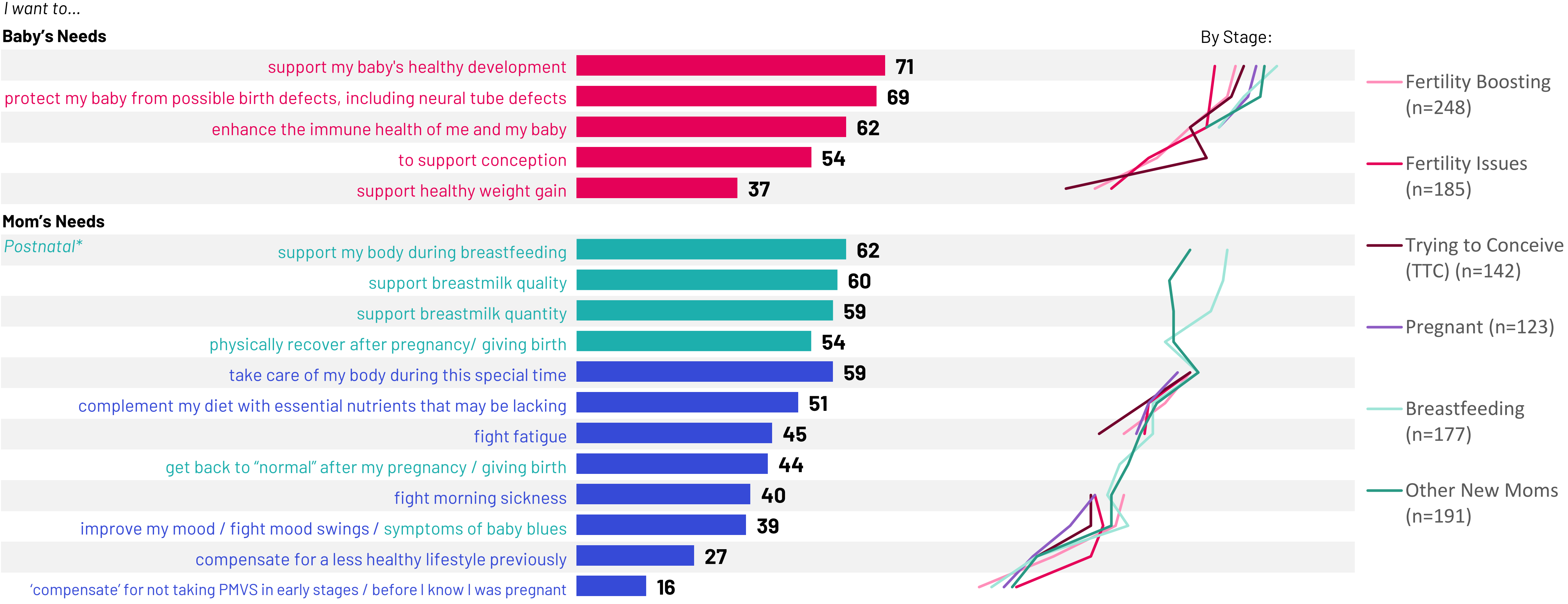
Excited
Nervous
Grateful
Anxious
Joyful

Grateful
Excited
Joyful
Supported
Anxious

Results in %, Base: All respondents, n=901 PMVS users p12m AUS
Q40: We would like to know how you currently feel – at this stage in your (pre-)pregnancy journey?

PMVS users show a high motivation especially around baby's needs.

Key Needs / Motivations for PMVS Usage (TopBox Agreement)



Results in %, Base: All respondents, n=901 PMVS users p12m AUS, *only asked to new moms
Q4: Below you find different motivations for using XXX? Please indicate in how far they are describing your personal motivation.
Please select one answer per motivation. 5pt scale, answers shown for topbox (5 = "absolutely")

Emotional and medicinal support as well as reassurance on the safety of the baby are their major concerns about morning sickness.

Social Media Deep Dive - Morning Sickness

Facts and general information
To learn about typical onset of morning sickness (varies from early-stage symptoms 10-11 days post ovulation to typical 6 weeks), explanations for extreme symptoms (such as Klinefelter Syndrom), tips and advice to better deal with morning sickness, often referring to reputable sources like the Royal Woman's Hospital in Sydney.

Emotional support
Sharing morning sickness experience to connect with other, be supported and reassured. Often in fear for their baby health, a way to cope with severe episodes by dedramatizing.

Seeking products & ingredients recommendations
Sharing their "remedies". Most mentioned: B6 and Doxylamine (Restavit) often in combination, Metoclopramide (Reglan), Ondansetron (Zofran), antihistamines alternatives to more popular doxylamine such as Gravol or Benadryl.
Marginal mentions: peppermint tea and ginger as a natural alternative. Also: Elevit Morning Sickness Relief with ginger and B6.

Concerns for medication intake and fear of putting baby at risk
Safety of medication is a key issue, preventing women to take any medication. Some concern that medication to avoid morning sickness at early stage impacted the health of the fetus and might have led to a TFMR. Dissolvable wafers such as Ondansetron were mentioned in that context. Proper dosage of VMS (in particular B6) is a further concern in this context.

Elevit make a morning sickness relief tablet which is ginger and B6 in a slow release tablet so it works all day. I used it in my first pregnancy and it worked great. In my second pregnancy ginger trigger my nausea so it was not effective at all.

Hi i am 7 weeks and today i started throwing up and basically I haven't stopped! […] First pregnancy, first day of excessive puking. Has anyone else experienced this? Could this somehow put my baby at risk?

Hey ladies, I'm hoping someone can help clear something up for me. I've realised vitamin B6 really does wonders for my nausea but I am confused was the max. daily dose is.

Product Deep Dive On Galenics

Food for thought about trending galenic!

The **gummy galenic** is often mentioned esp. in discussion where Australian users talk with international users (from the USA, Canada, ...) as an indulging and "yummi" option to classical galenic esp. at the beginning of the pregnancy when having difficulties to swallow big capsules or experiencing morning sickness and trying to avoid too smelly capsules.

The large number of discussions around sensory experience of galenic (shape, size, smell of products) show the **potential for innovative formats**, emotionally dedramatizing and more fun to use.

Looking for recommendations of the smallest size pregnancy vitamins available please. TIA!
I'm having trouble swallowing the pregnancy vitamins with my nausea, it often "triggers" morning sickness.
I've given up on blackmores, they're too big. I've heard elevit are bigger. > You can get ***prenatal gummies****! Or if you can't stomach your prenatal, you can just get folic acid on its own (tiny tablet) and take that till your morning sickness subsides. My prenatals definitely make my sickness worse. (reddit)*

I think I'm at week 5 (well according to the Flo app I am) and I just tested positive yesterday. I do have some fefol capsules but they are massive and I can't swallow tablets easily at all.
Does anyone know of any good ***liquid prenatal*** *vitamins in Australia???*
*> If you can't do a big prenatal specifically then a folic acid tablet on its own is tiny, with a version of a multivitamin you can do (****gummy****, etc) is fine. (reddit)*

back to overview

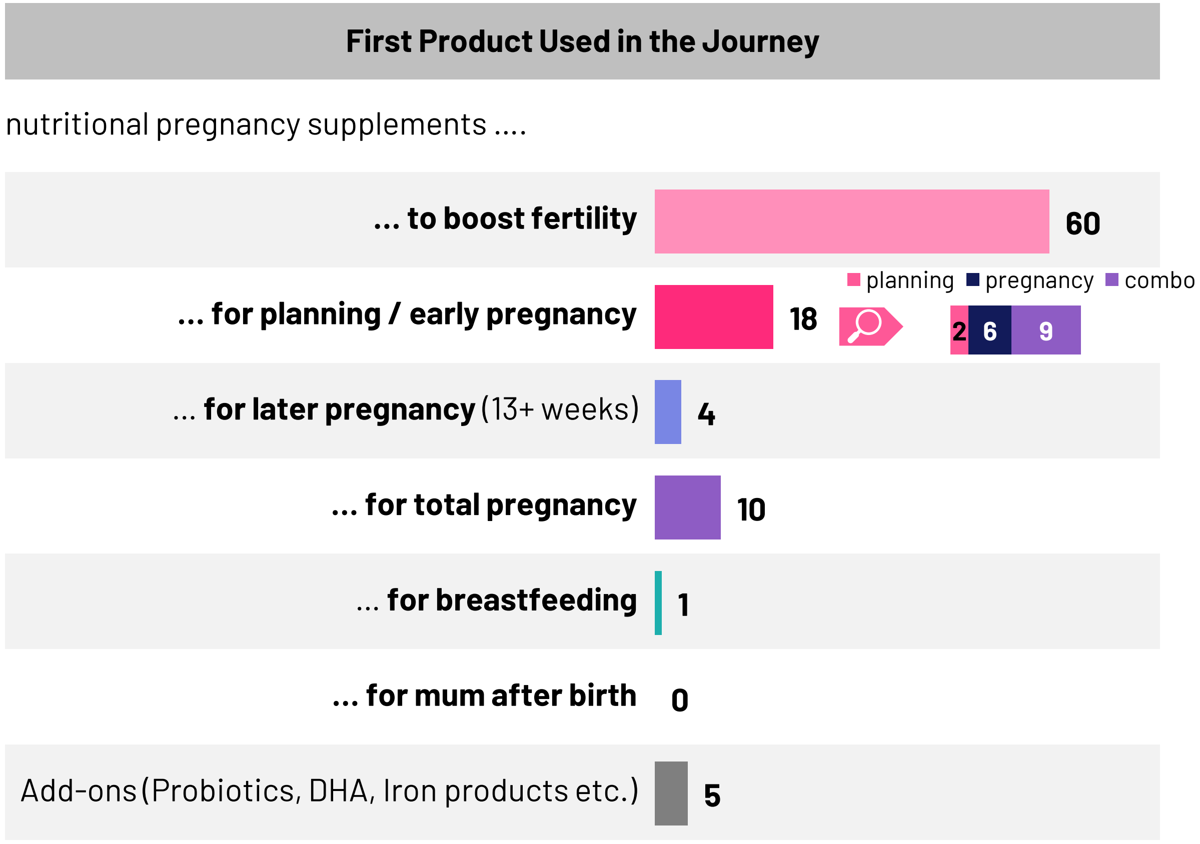
DEEP DIVE FERTILITY

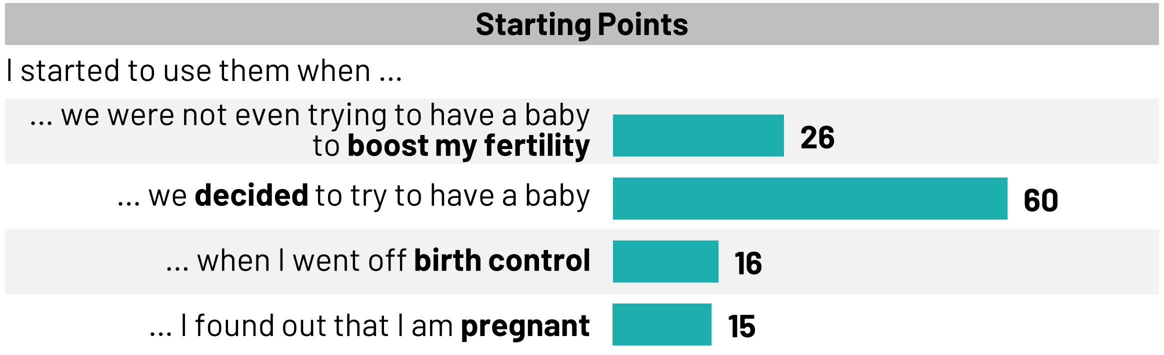
More than half of the PMVS category users start with a supplement in fertility stage and almost half report fertility issues.

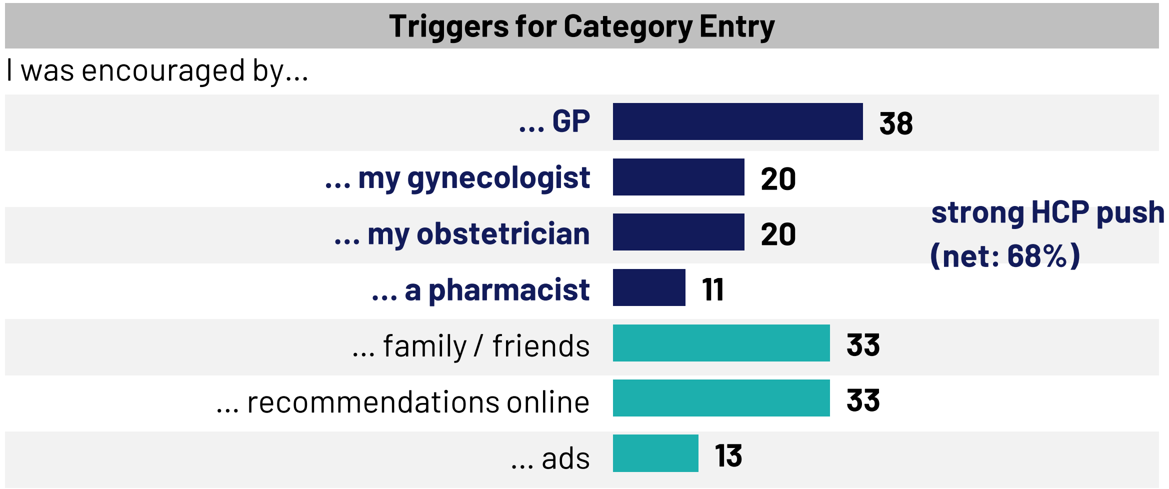
Ipsos

More than half of the Australian PMVS users start using pregnancy related supplements in order to boost their fertility.

Category Entry Point AUS







Results in %
Base: All respondents, n=901 PMVS users p12m AUS
Q1: Thinking of your current pregnancy journey, please select all the products you have used so far – from the start of your pregnancy journey up to now?,
Q2 / Q2a: Thinking about the time you started using XXX, which of the following applies to your situation.?

1 in 3 pregnant women only started when she found out, 2 in 3 were already in the category when they found out they are pregnant.

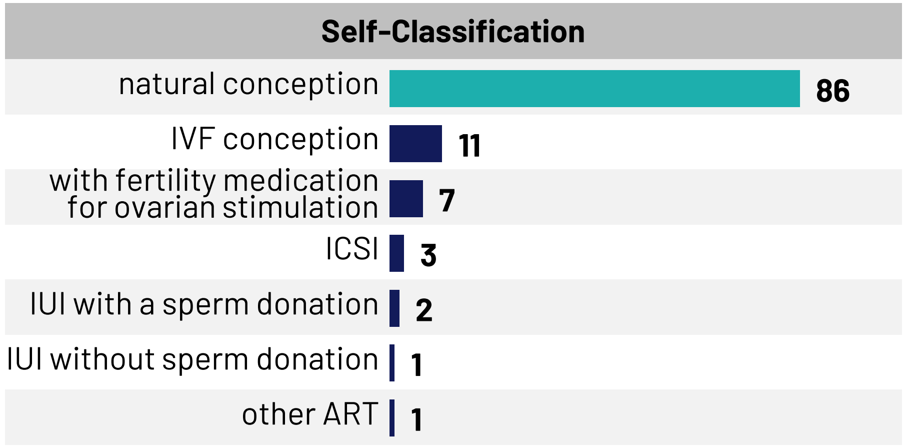
Category Entry Point AUS

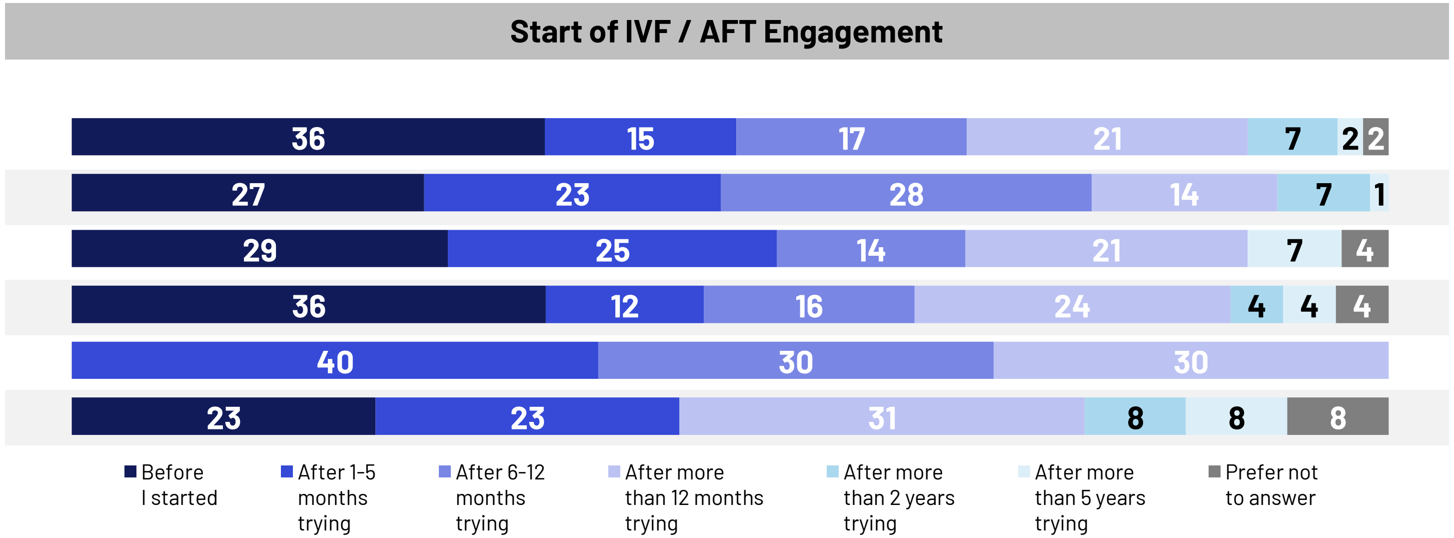
Starting Points	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
I started to use them when ...	n=248	n=185	n=142	n=123	n=177	n=229
... we were not even trying to have a baby to **boost my fertility**	34	36	24	17	11	17
... we **decided** to try to have a baby	55	58	80	54	60	59
... when I went off **birth control**	17	18	15	15	10	14
... I found out that I am **pregnant**				34	31	27
Triggers for Category Entry						
I was encouraged by...						
... an HCP (net)	57	64	67	63	69	69
... my GP	38	32	34	42	44	41
... my obstetrician	15	28	27	11	15	17
... my gynecologist	13	23	26	22	23	22
... a pharmacist	12	13	12	7	11	10
... family / friends	37	30	29	32	31	28
... recommendations online	32	38	36	35	29	31
... ads	19	12	14	9	8	10

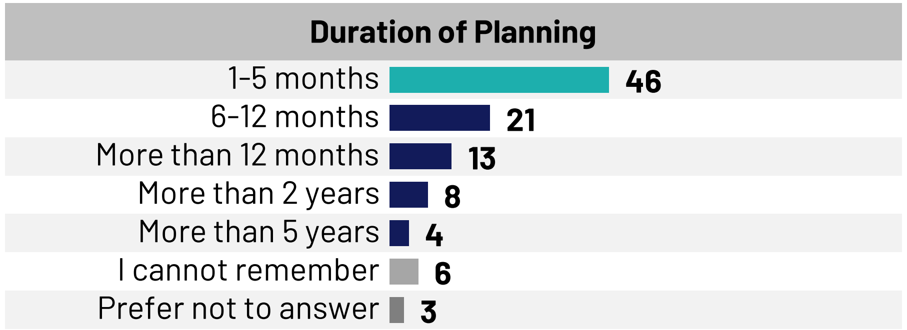
Results in %
Base: All respondents, n=901 PMVS users p12m AUS
Q2 / Q2a: Thinking about the time you started using XXX, which of the following applies to your situation.?

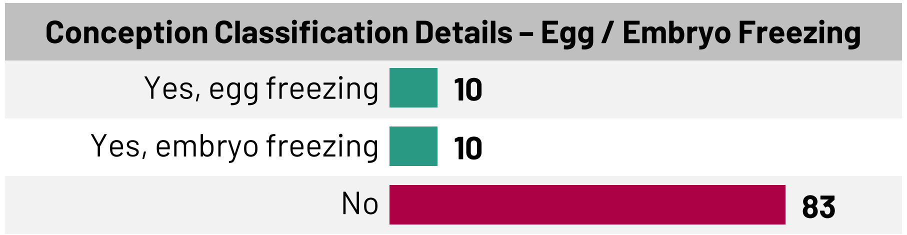
More than half of the Australian PMVS users tried to conceive for 12+ months and for 17%their journey involved cryopreservation.

Deep Dive Fertility









Australian PMVS Users

42% state they have fertility issues

45% > 6 months to conception

17% involve egg or embryo freezing

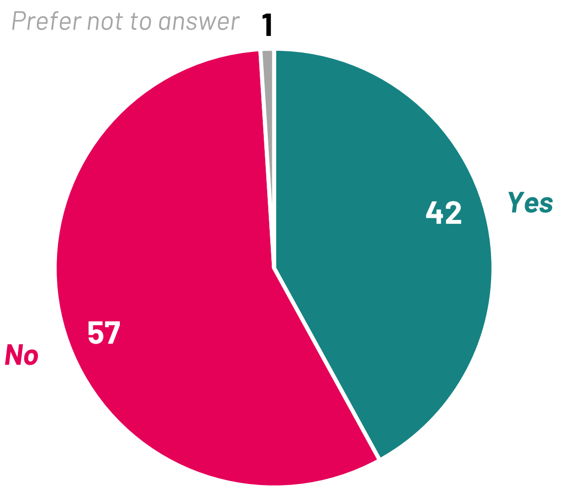
14% in fertility treatment

Results in %
Base: All respondents, n=901 PMVS users p12m AUS
S8b: Duration of Planning, S9: Self-Classification, S9a: Conception Classification Details – Egg / Embryo Freezing, S10: Start of IVF / AFT ENGAGEMENT, S11: Issues Experienced?

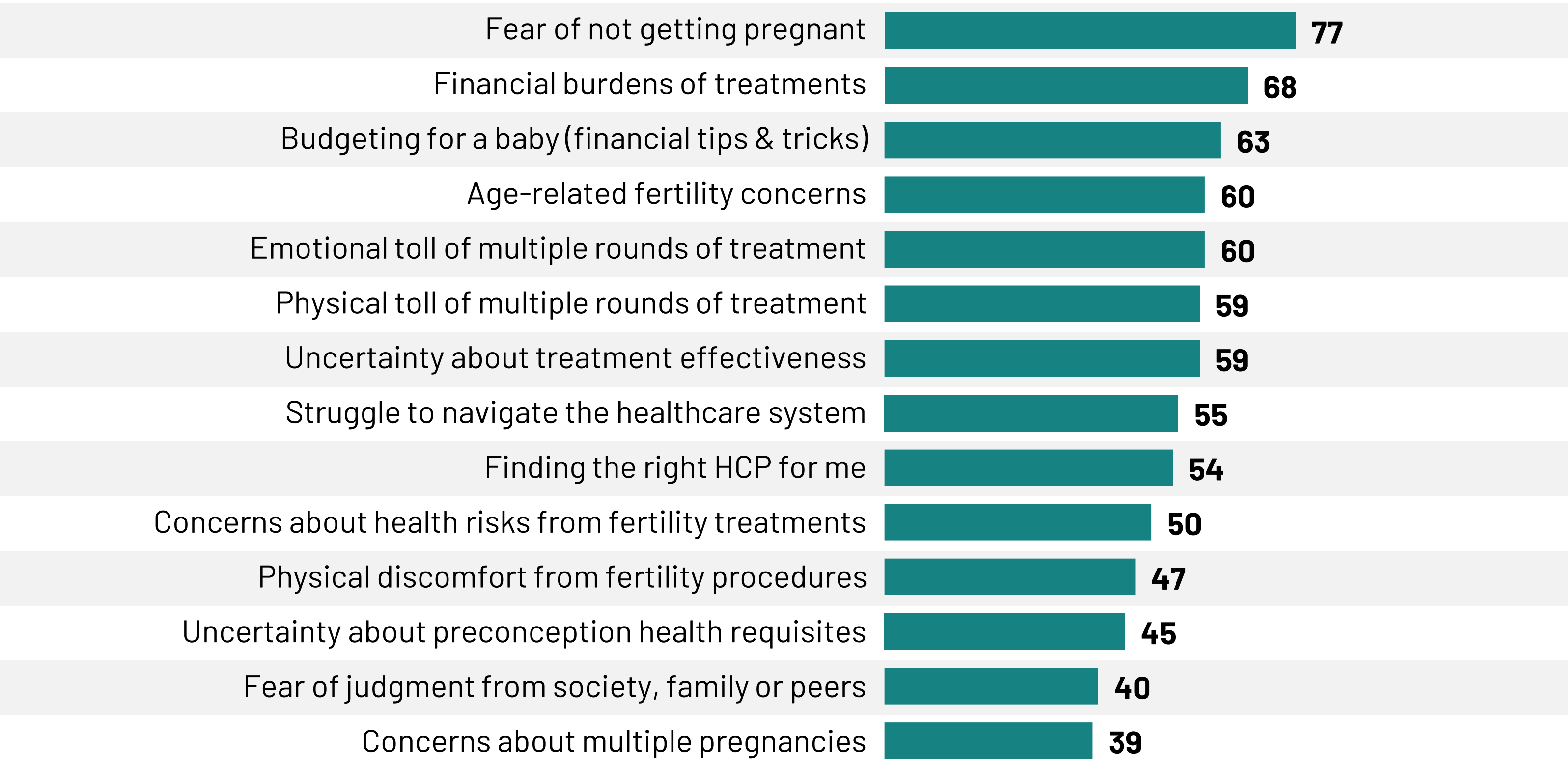
Almost half of the Australian PMVS users experienced fertility issues. Financial worries are among the main worries in this context.

Opportunity Target – Women with Fertility Issues

Issues Experienced?



Key Needs / Worries (Top2Box Agreement)

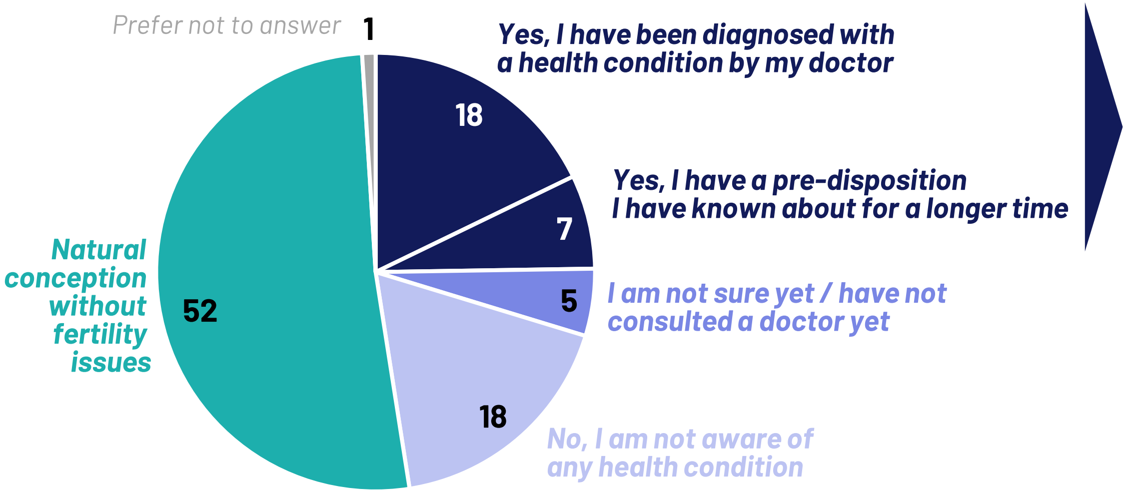


Results in %
Base: All respondents, n=901 PMVS users p12m AUS, Respondents who have experienced issues around fertility, n=568
S11: Have you (ever) experienced any issues or concerns around fertility?
S12: Below you find different worries or concerns women noted in the context of … .

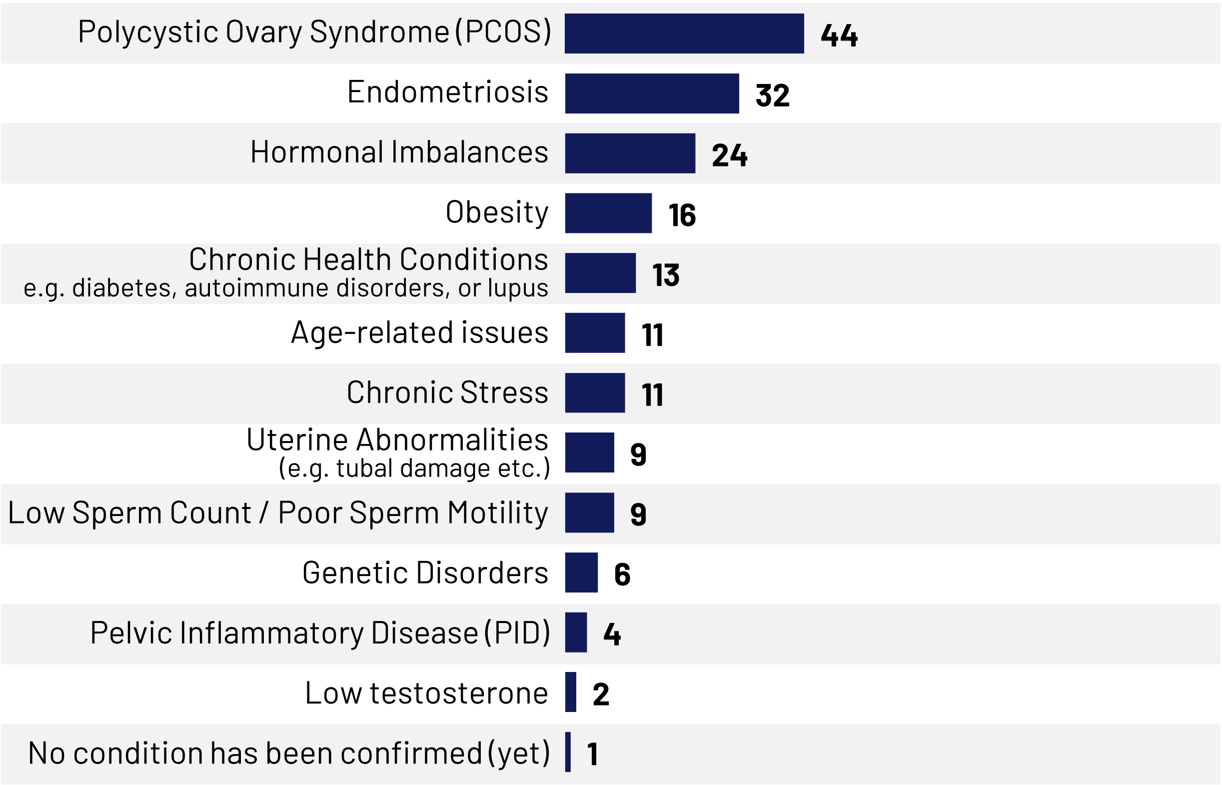
27% of the PMVS users state a health condition or pre-disposition – mainly hormonal imbalances and PCOS.

Opportunity Target – Women with Fertility Issues

Awareness of Health Issue(s)



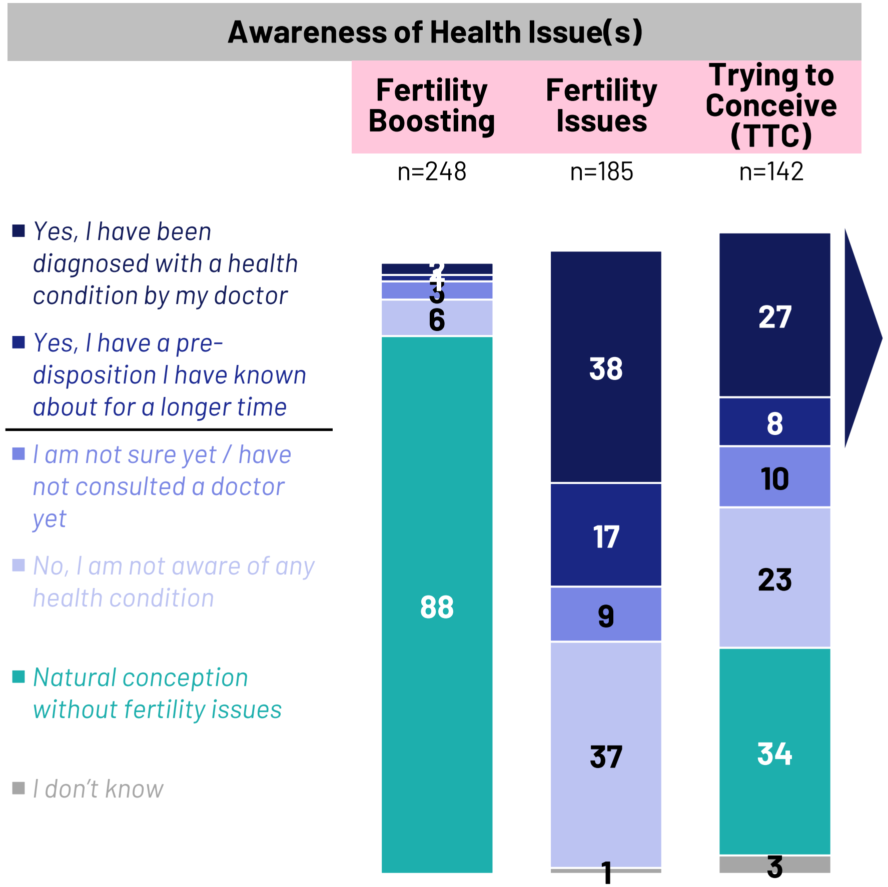
Health Condition – Detail

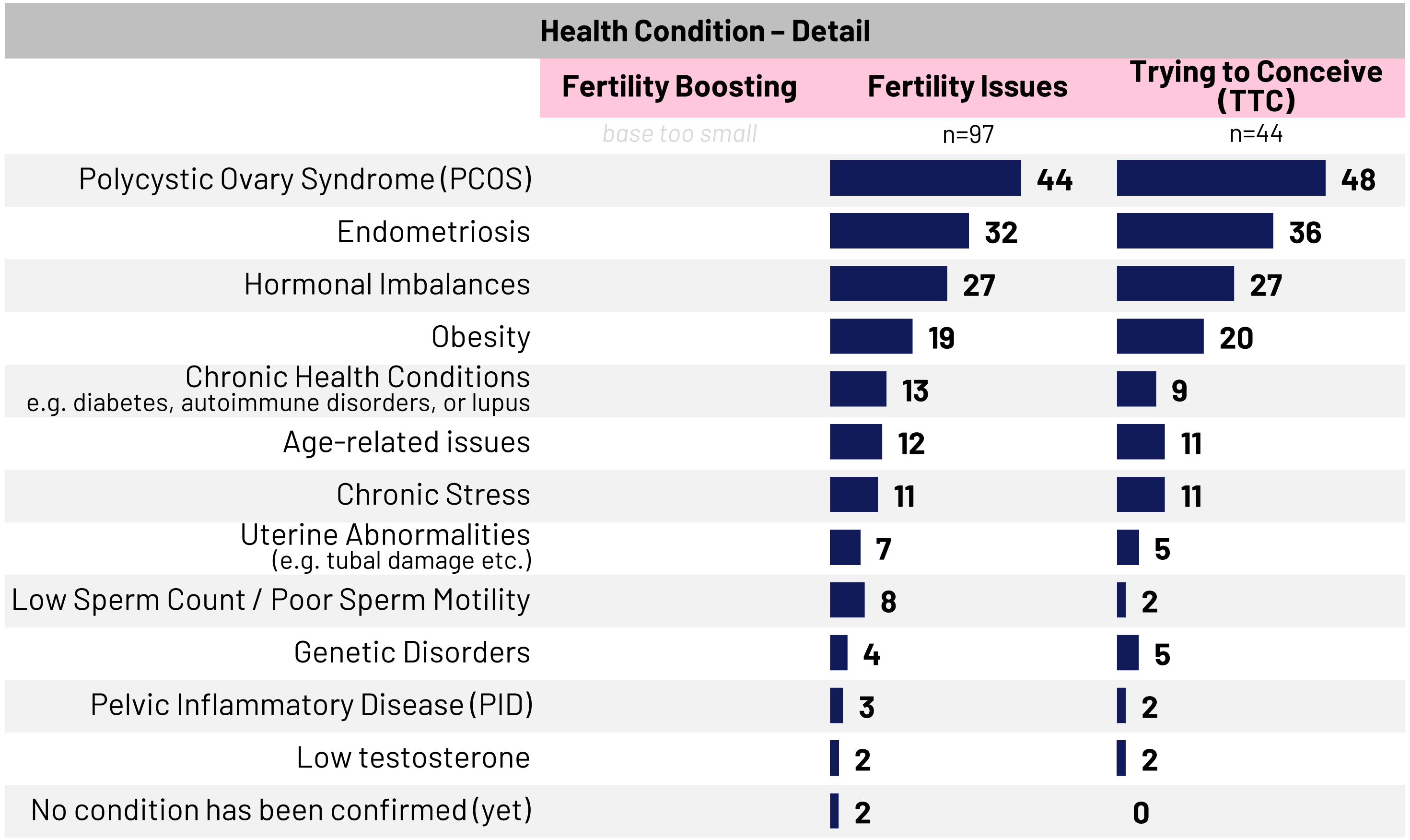


Results in %
Base: All respondents, n=901 PMVS users p12m AUS, Respondents with health condition that is causing fertility issue(s): n=216
S15: Do you know or have you been confirmed that there is a health condition causing your fertility issue(s)?
S16: Are you comfortable telling us which health condition(s) have been confirmed?

1 in 3 women with fertility issues has been diagnosed with a health condition, minal yPCOS and endometriosis. Only 1 in 3 currently TTC claim to have no fertility issues.

Opportunity Target – Women with Fertility Issues

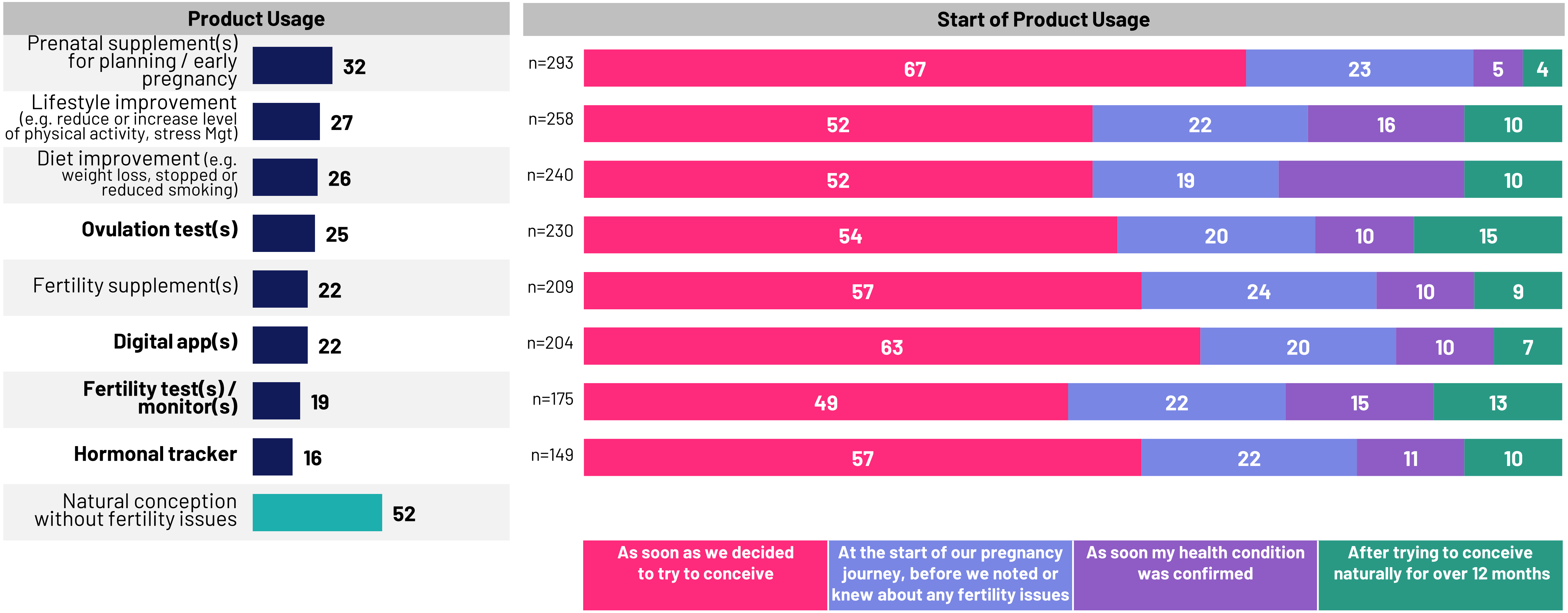




Results in %, !!! very small base
Base: All respondents, PMVS users p12m MEX, Respondents with health condition that is causing fertility issue(s)
S15: Do you know or have you been confirmed AUS there is a health condition causing your fertility issue(s)?
S16: Are you comfortable telling us which health condition(s) have been confirmed?

1 in 3 women with fertility issues used supplements – mostly from the beginning of their fertility journey.

Opportunity Target – Women with Fertility Issues



Results in %
Base: All respondents, n=901 PMVS users p12m AUS
S14: Did you use any of the below products or solutions to support fertility? / S17: When did you start to use the ...?

Half of the women in planning stages already use Elevit. Swisse is a stronger competitor in fertility stages, Blackmores in TTC.

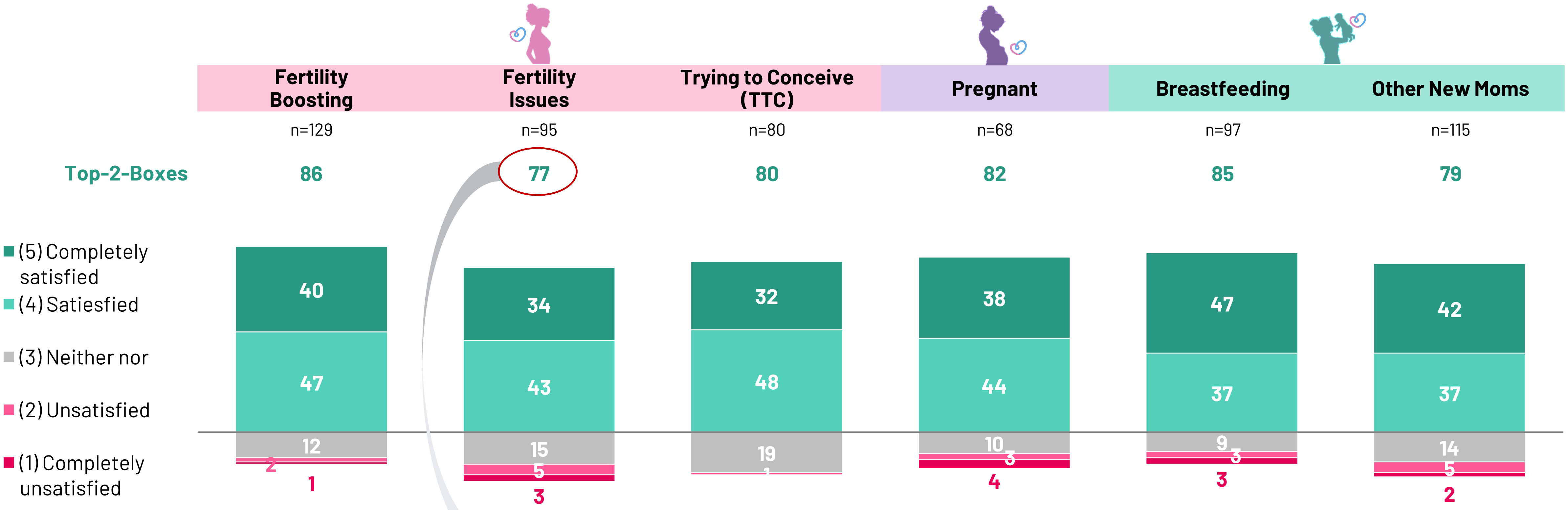
Brand Used in the Past 12 Months by Stage

	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
	248	185	142	123	177	229
elevit	52	51	56	55	55	50
Blackmores	29	26	35	30	36	36
Swisse	19	19	16	12	9	15
Bioceuticals	4	5	6	2	3	5
Natalis	4	4	2	7	7	5
Megafol-9	2	4	5	3	6	6
Kin	1	3	3	5	5	4
Life Space	4	3	2	2	1	1
Qiara	2	3	3	-	5	4
FabFol	1	1	3	2	1	2
Nature Made	2	2	2	4	5	4
NaturoBest	4	4	3	2	2	3
JS Health	1	4	1	2	1	1
Ovitae	1	2	2	2	1	2
Bio Island	1	1	-	2	1	-

Results in %, !small base
Base: All respondents, PMVS users p12m AUS
B6: Which of the following brands of ... have you used in the last 12 months?

Satisfaction levels with Elevit are very high – also already in fertility boosting stage.

Brand Satisfaction with **Elevit** by Stage

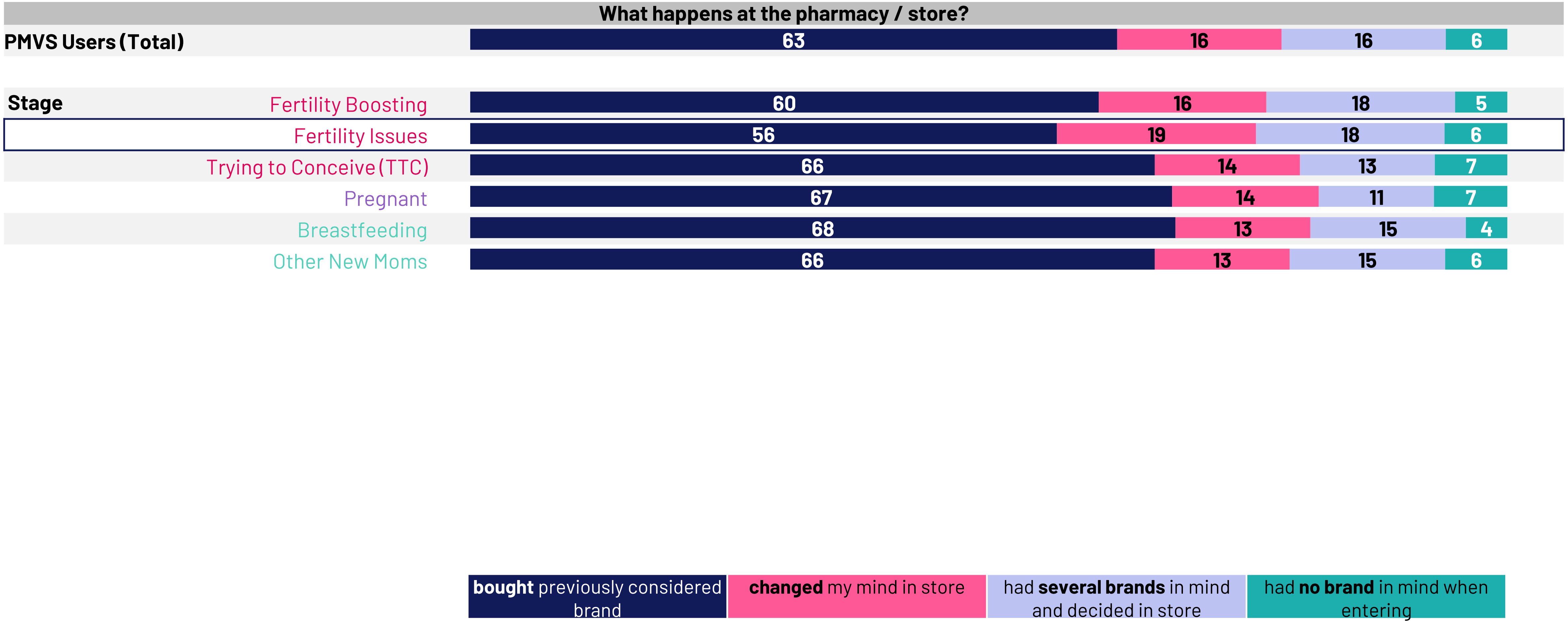


Even higher satisfaction
with Blackmores (90% T2B)
while other competitors also
around 70-75%

Results in %
Base: All respondents
Q27: To what extent are you satisfied or unsatisfied with each of the following brands of ... that you used in the past 12 months?

Only half of the women with fertility issues entered the pharmacy with a brand in mind and bought it – 19% change their mind in store.

Key Moments of Purchase Decision Making AUS



Results in %,
Base: All respondents, n=901 PMVS users p12m AUS
Q19: Before actually buying, did you consider a specific brand to buy?

At the POS, women in fertility stages are more interested in brand reputation and breastfeeders pay more attention to active ingredients.

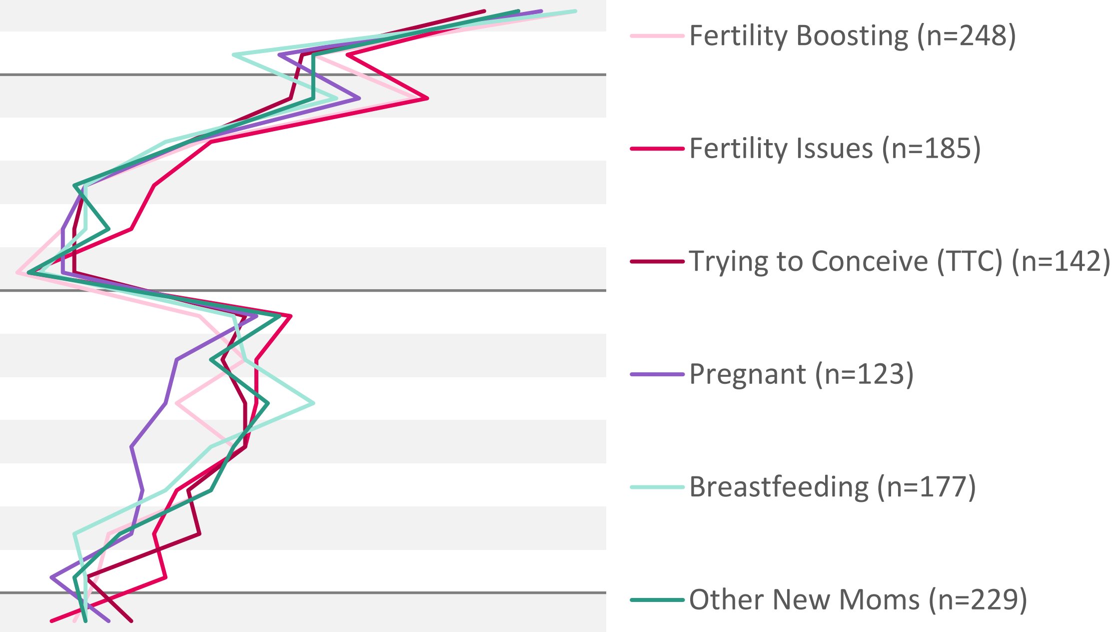
POS Behavior – by Stage

Recommendation Received

At the Last Purchase, did you **compare** any ...

among p12m brand users of...

Price	prices	50
	price promotions	30
Brand	brand reputation	36
	product promises	21
	expertise in the category	12
	country of origin	12
	POS material	7
Product	# of tablets / capsules to be taken	25
	side effects	24
	active ingredients	23
	package sizes	22
	size of the tablet / capsule	19
	tablet formats	15
	capsule formats	12
	nothing	11



Results in %
Base: All respondents, n=901 PMVS users p12m AUS
Q15: Please think again about the last time you bought CATEGORY, did you compare any of these features / attributes before you decided on the brand to buy?

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DEEP DIVE HCP

The HCP remains the most important source of information and a strong band promoter for Elevit

Role of the GP in Australia

GP and midwifes, especially in the context of shared care arrangement are pivotal HCPs.

The GP experienced in maternal health or offering maternity shared care appears to be a key HCP along the pregnancy journey especially during the **first trimester** of the pregnancy, for women under Public Healthcare (Medicare) and low risk pregnancies.

As everyone has said, you'll need to find a good GP. My suggestion would be to find a GP who has sought further qualifications in women's health & antenatal - this will be DRANZCOG after their name on the website. You could also look for someone who offers "shared care" as it means they are experienced in looking after lots of pregnant women and probably will understand the system a bit better! (reddit)

If you don't already have one, find a GP you like who has time for you (as in they actively listen and consider what you have to say) now. Find them before you start this journey. Preferably find someone with some experience or at least an interest in pregnancy and children. This way you can be sure you are being listened to and aren't being dismissed. You might need to try a few different GPs, they aren't all the same and quality and have different experience in the area (if at all!!) (reddit)

Public Care

If you're pregnant and using **Public Healthcare (Medicare)**, your care journey usually starts with your GP who will

- Confirm your pregnancy
- Order initial blood tests and an ultrasound
- Talk through your antenatal care options
- Refer you to a public hospital or a shared care arrangement

In Australia's **Public Healthcare** system, you don't go straight to an obstetrician (OB) or gynaecologist (GYN) unless there's a medical reason — it's a referral-based system. If your pregnancy is low-risk, you may:

- Get care mainly from midwives or through GP shared care
- Only see an OB/GYN if complications arise

Private Care

Only under **Private OB/ GYN Care**, you can choose to see a private obstetrician or gynaecologist from the beginning of your pregnancy (no referral needed), but:

- You pay out of pocket (even if Medicare covers a portion)
- You need private health insurance if you want hospital fees covered

In Australia the **Private Health Insurance** is optional but encouraged via government incentives and penalties. Monthly premiums vary based on age, level of cover, and whether it includes extras. The insurance can cover:

- Private hospital treatment (choose your doctor and hospital)
- Services not covered by Medicare, like dental, physiotherapy, glasses, and more (called "extras")
- Quicker access to elective surgeries

Half of the PMVS users got a HCP recommendation before buying their first pack – around 1 in 3 got another HCP reco for their currently used product.

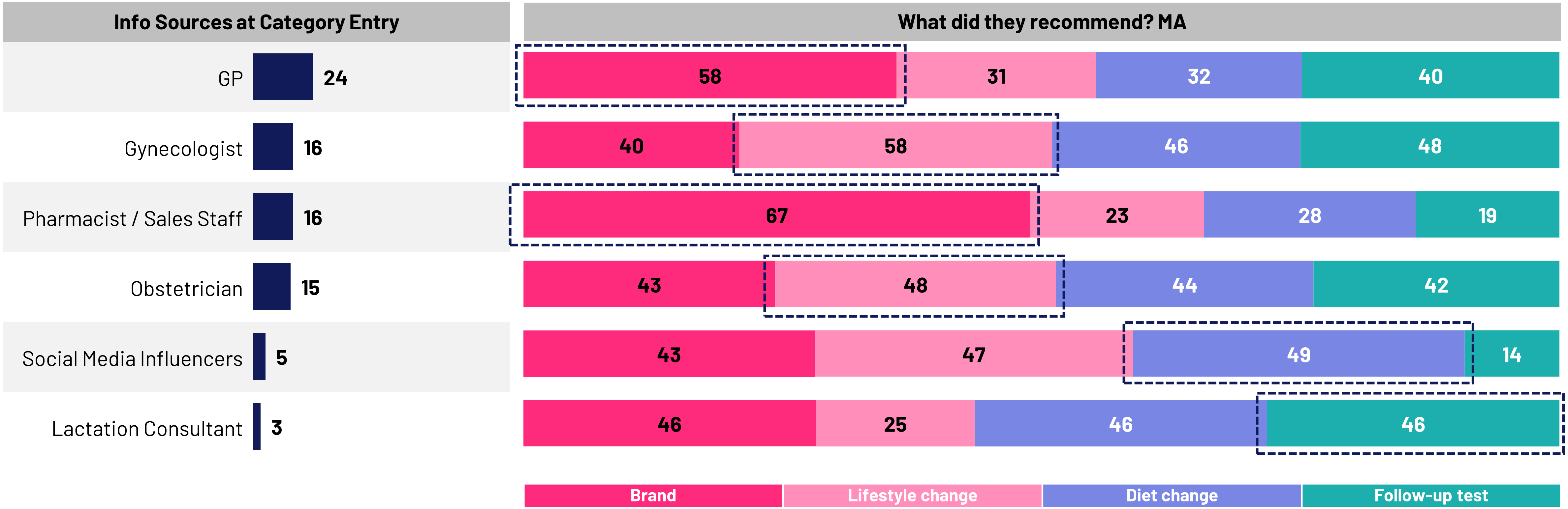
Key Decision Influencers AUS

Info Source Used... at Category Entry		and used again in current stage: Fertility Boosting	Fertility Issues	Trying to Conceive	Pregnant	Breastfeeding	Other New Moms
HCP Reco by... (net)	56	38	45	36	34	32	36
Doctor's reco (net of GP / gyn / obs)	46	30	37	32	28	27	31
GP	24	15	16	8	15	13	14
Gynecologist	16	10	12	16	8	6	7
pharmacist / sales staff	16	9	10	6	7	5	4
Obstetrician	15	8	12	11	7	8	11
Lactation consultant	3	1	1	1	-	5	5
I got a sample from a clinic / doctor	8	4	1	2	6	2	2
Independent Research (net)	43	31	32	30	18	21	22
Online Research (net)	37	27	25	29	16	18	20
I searched online	26	20	16	23	13	15	16
Saw something online	16	8	10	7	3	4	5
Saw something on TV	9	4	6	1	3	2	1
Saw it in books	6	1	2	1	-	1	1
got a reco by friends / family	27	21	15	13	13	14	15
POS Influence (Pharmacy / Store) net	21	10	14	14	11	11	11
Spontaneously decided at the POS	9	6	5	6	3	6	5
It was on promotion at the POS	9	4	6	6	6	3	6
I saw an ad at the POS	6	1	3	3	2	2	1
I used it in my previous pregnancy	16	8	6	13	14	18	11

Results in %, Base: All respondents, n=901 PMVS users p12m AUS; Subtargets: n=248, n=185, n=142, n=123, n=177, n=229
Q6: Please think of your first purchase of XXX- how did you decide which brand to buy?, Q11: Thinking about your last purchase of CATEGORY, did you consult any of those sources again?

More than half of the GPs consulted by our users recommend a brand – among pharmacists even 2 in 3.

Role of Influencers in AUS



Results in %,
Base: All respondents, n=901 PMVS users p12m AUS
Q6: Please think of your first purchase of XXX- how did you decide which brand to buy?, Q8c: You noted that you got a recommendation. What exactly did they recommend to you?

Only 14% of Australian women got a brand recommendation from their GP / doctor. Compliance and satisfaction with HCP reco are high – lower for influencers.

HCP Brand Recommendations at Category Entry

	Doctor (net)	GP	Gynecologist	Pharmacist / sales staff	Obstetrician	Influencer	Lactation consultant
Gave a reco at category entry	46%	24%	16%	16%	15%	5%	3%
For a brand	25%	14%	7%	11%	7%	2%	1%
For elevit / **another brand**	**17%** / **8%**	**9%** / **5%**	**4%** / **2%**	**6%** / **4%**	**4%** / **2%**	**1%** / **1%**	**1%** / **1%**
Women followed HCP reco	78%	75%	74%	70%	75%	-*	64%
Women satisfied with the reco (T2B)	86%	79%	78%	82%	85%	65%	65%

Results in %, *not asked
Base: All respondents, n=901 PMVS users p12m AUS
Q6: Please think of your first purchase of XXX- how did you decide which brand to buy?, Q8c: You noted that you got a recommendation. What exactly did they recommend to you?, Q8d: Which brand did they recommend you use?,
Q16a: Did you follow your HCP brand reco?, Q9: To what extent are you satisfied or unsatisfied with the recommendation that you received?

Elevit Brand Recommendation by Doctors*

46% Of women in AUS consulted any doctor on PMVS*

25% Receive a doctor's **brand** recommendation

17% Receive a doctor's recommendation for **Elevit**

15% are **satisfied** with the reco (T2B)

13% of women **follow** their doctor's reco for **Elevit**

Results in %, Base: All respondents, n=901 PMVS users p12m AUS; Q6, Q8c, Q8d, Q16a, Q9

back to overview

*net of GP / gyn / obstetrician

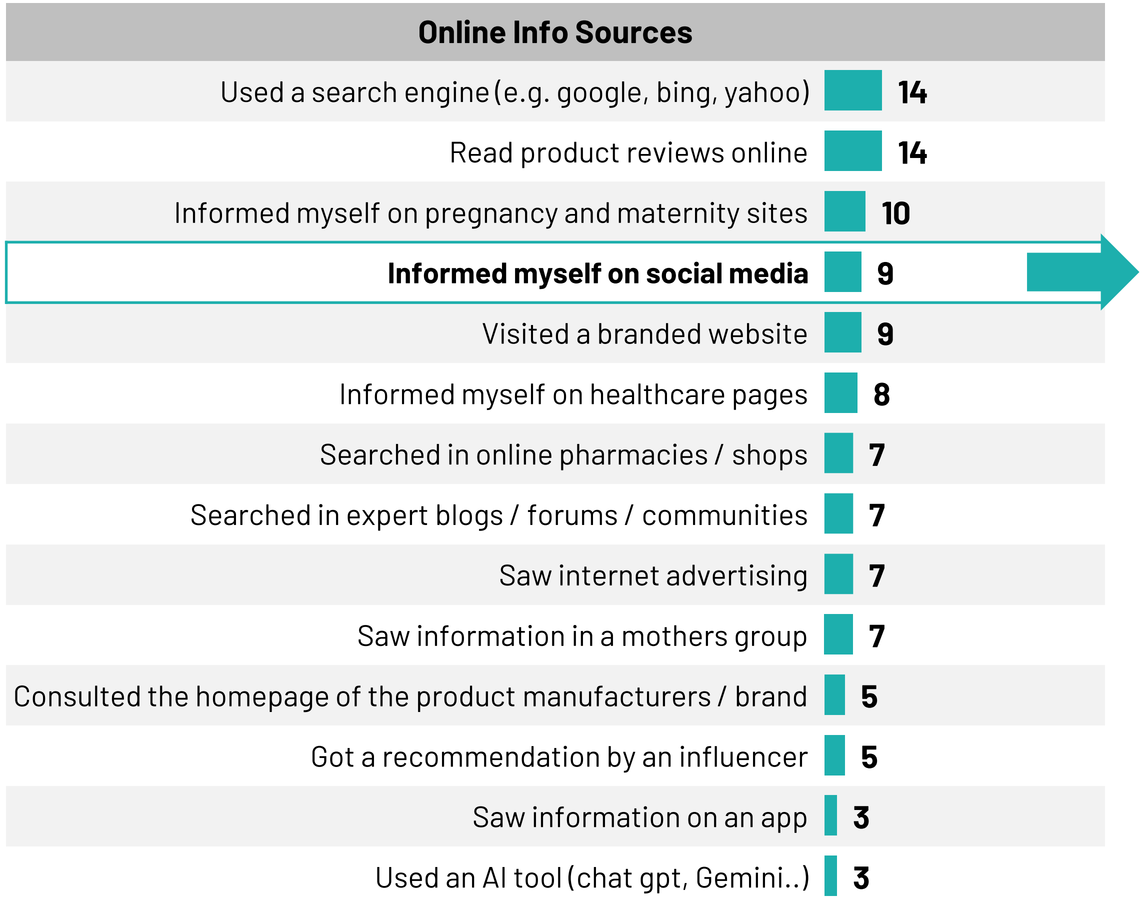
Ipsos

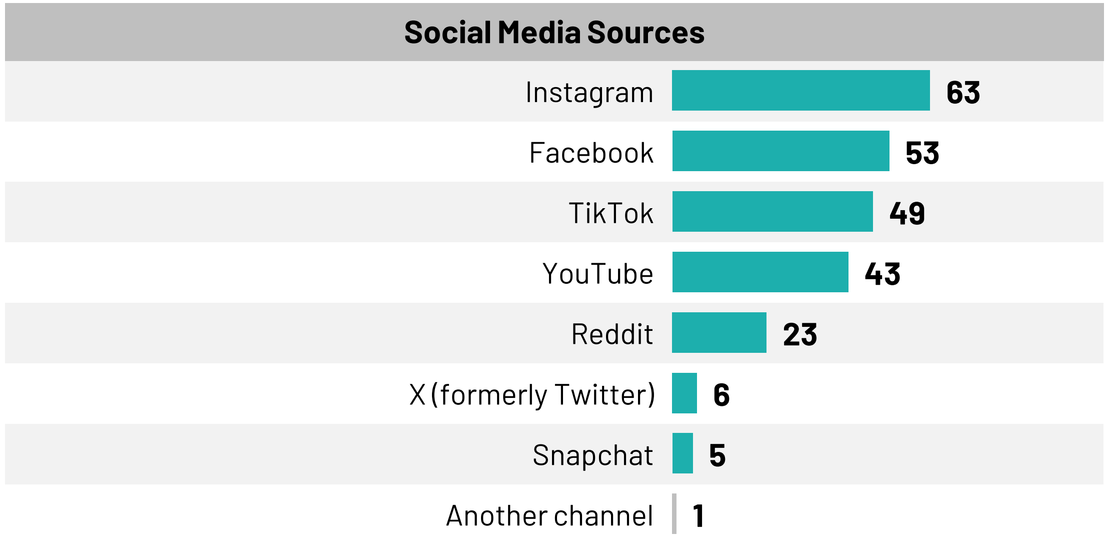
DEEP DIVE INFLUENCERS

Online touchpoints are the 2nd most important source of info (after the HCP) and particularly vital for women with fertility issues – esp. topic related podcasts have a high reach in the pregnancy bubble in Australia.

9% of PMVS users informed themselves on social media – mainly via Instagram, followed by Facebook and TikTok.

Relevance of Online Touchpoints





Results in %,
Base: All respondents, n=901 PMVS users p12m AUS; Category User who informed themselves on social media n=79
Q7: You stated that you have seen something online that influenced your purchase of … . What exactly have you done online? / Q7a: Which social media channels did you consult?

Women with fertility issues are most active in researching online.

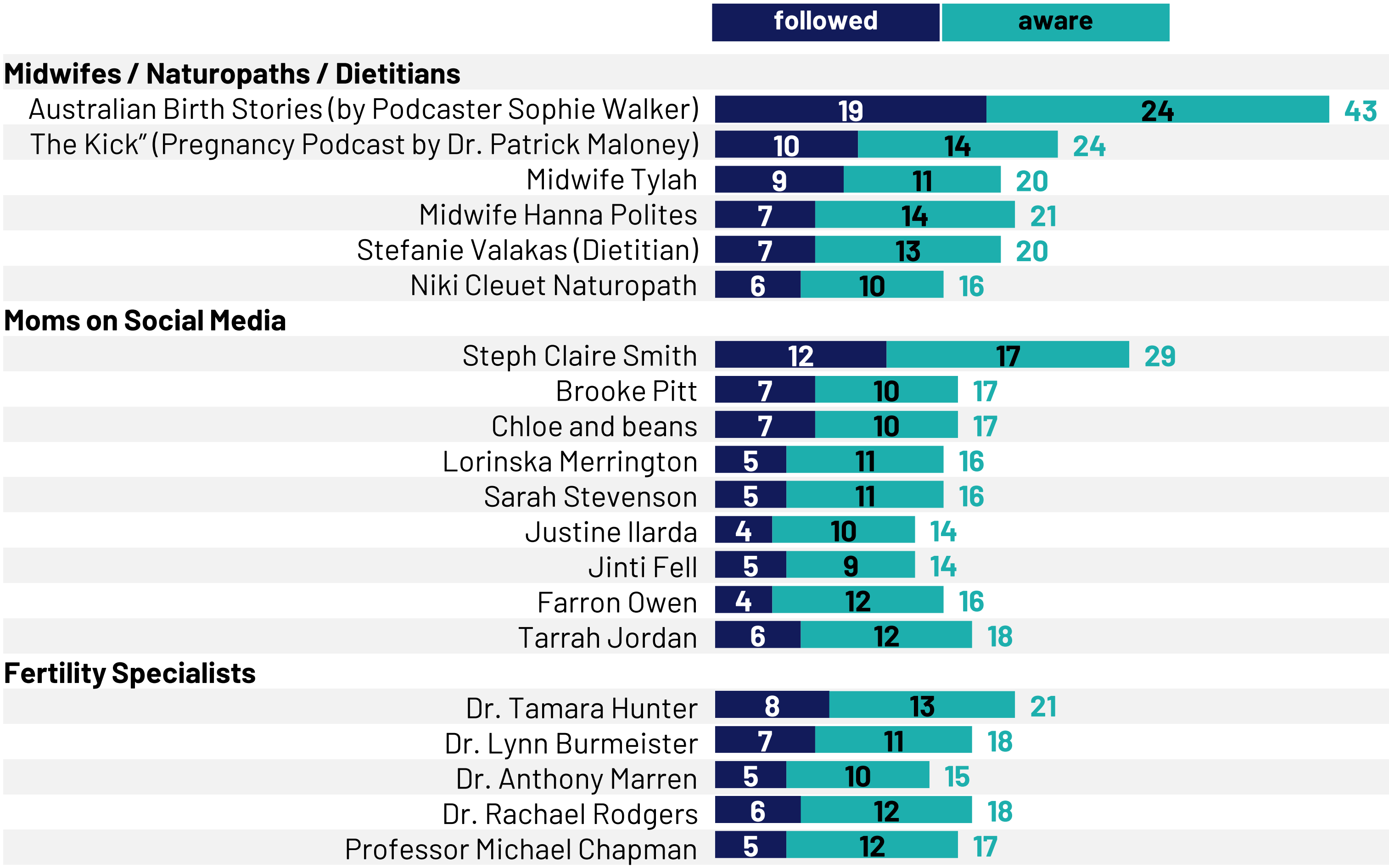
Relevance of Online Touchpoints – by Stage

	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
	n=248	n=185	n=142	n=123	n=177	n=229
Used a **search engine** (e.g. google, bing, yahoo)	15	17	18	10	12	15
Read **product reviews** online	18	12	20	10	12	13
Informed myself on pregnancy and **maternity sites**	13	9	15	10	13	9
Informed myself on **social media**	10	13	8	4	8	7
Visited a **branded website**	12	8	8	10	7	8
Informed myself on **healthcare pages**	11	8	10	2	4	6
Searched in **online pharmacies** / shops	8	10	9	6	5	7
Searched in expert **blogs** / forums / communities	7	11	13	3	5	4
Saw internet **advertising**	8	6	8	6	6	7
Saw information in a **mothers group**	5	10	7	4	8	6
Consulted the **homepage** of the product manufacturers / brand	4	6	7	3	3	4
Got a recommendation by an **influencer**	7	6	6	4	5	3
Saw information on an **app**	2	6	4	1	3	1
Used an **AI tool** (chat gpt, Gemini..)	2	3	5	3	1	2

Results in %
Base: All respondents, PMVS users p12m AUS
Q7: You stated that you have seen something online that influenced your last purchase of … . What exactly have you done online?

Almost half of the Australian women know the Podcast Australian Birth Stories – 1 in 5 already follows it.

Reach of Social Media Influencers in AUS



32% of the women do not know any social media influencer from the list

Results in %, Base: All respondents, n=901 PMVS users p12m AUS
7c: Do you know / follow any of the below influencers?

Women with fertility issues with highest reach for multiple influencers.

Reach of Social Media Influencers

Top2Box ("I know them"):	Fertility Boosting	Fertility Issues	Trying to Conceive (TTC)	Pregnant	Breastfeeding	Other New Moms
	n=248	n=185	n=142	n=123	n=177	n=229
Midwifes / Naturopaths / Dietitians						
Australian Birth Stories (by Podcaster Sophie Walker)	42	47	37	37	54	42
"The Kick" (Pregnancy Podcast by Dr. Patrick Maloney)	25	29	25	22	20	15
Midwife Tylah	23	24	17	15	17	12
Midwife Hanna Polites	25	23	19	15	20	16
Stefanie Valakas (Dietitian)	20	28	18	15	14	12
Niki Cleuet Naturopath	12	22	15	15	13	11
Moms on Social Media						
Steph Claire Smith	28	37	34	22	27	24
Brooke Pitt	13	24	20	14	11	11
Chloe and beans	15	25	18	17	11	10
Lorinska Merrington	16	21	15	12	14	13
Sarah Stevenson	17	23	15	11	12	14
Justine Ilarda	12	21	14	11	10	9
Jinti Fell	9	18	15	16	12	8
Farron Owen	12	20	17	15	11	9
Tarrah Jordan	16	25	17	17	15	15
Fertility Specialists						
Dr. Tamara Hunter	20	23	23	22	13	12
Dr. Lynn Burmeister	13	26	23	15	11	11
Dr. Anthony Marren	15	19	17	15	9	9
Dr. Rachael Rodgers	15	23	20	16	12	10
Professor Michael Chapman	16	25	17	12	14	10

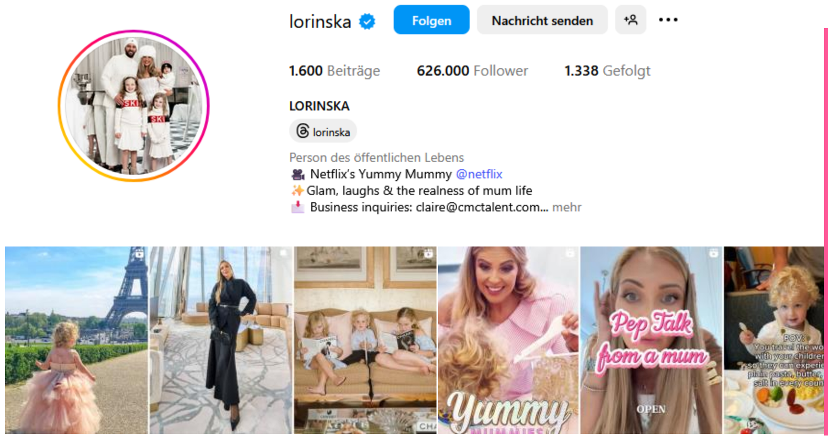
Results in %, Base: All respondents, n=901 PMVS users p12m AUS
7c: Do you know / follow any of the below influencers?

Diverse personalities and lifestyles offering guidance and inspiration in sharing their family lives and daily (beauty and health) routines.

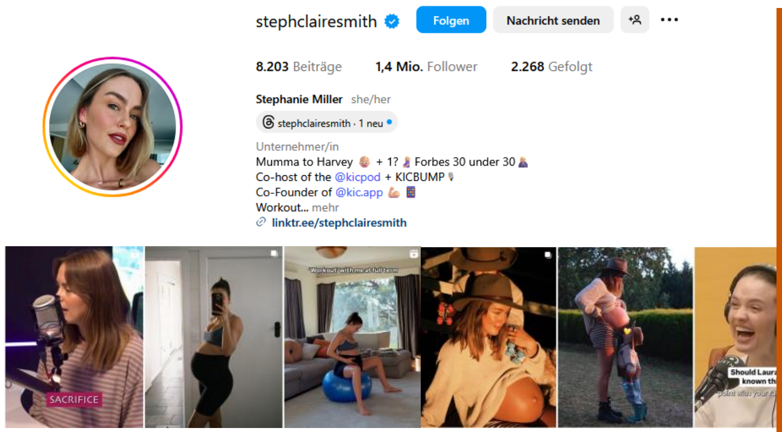
Creators & Influencers: Pregnant and past pregnant women

Sarah Stevenson, aka "Sarah's Day," Australian health and fitness influencer, YouTuber, and entrepreneur, shares content on fitness, nutrition, and holistic wellness, with a strong following on YouTube (1,5 mio) and Instagram (1,2 mio). As mother of three, she promotes a balanced lifestyle through workout routines, healthy recipes, and lifestyle vlogs.

Chloe, known online as "Chloe and Beans," is a Perth-based Australian mother of ten, including twins and triplets. She shares her family's home-schooling journey and daily life on Instagram and Facebook. In 2023, Chloe publicly shared her diagnoses of autism and ADHD, offering insights into neurodiversity within her family.



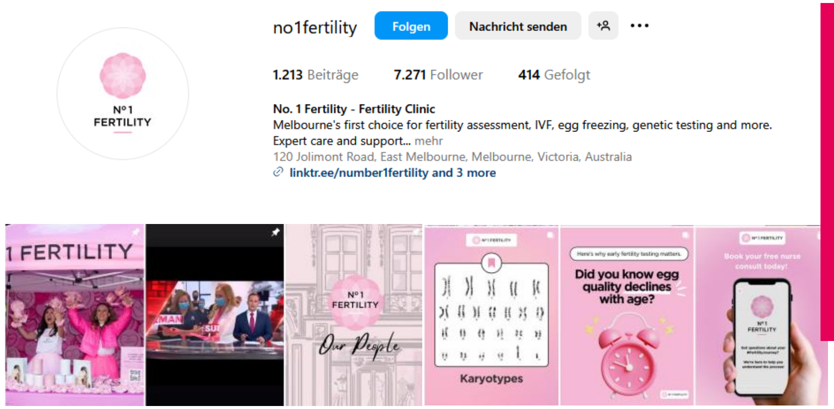
Lorinska Merrington is an Australian media personality, model, and entrepreneur. She gained prominence as a star of the reality TV series "Yummy Mummies," which aired on Netflix. Beyond her television career, Lorinska has ventured into entrepreneurship, leveraging her public profile to engage in various business endeavors.



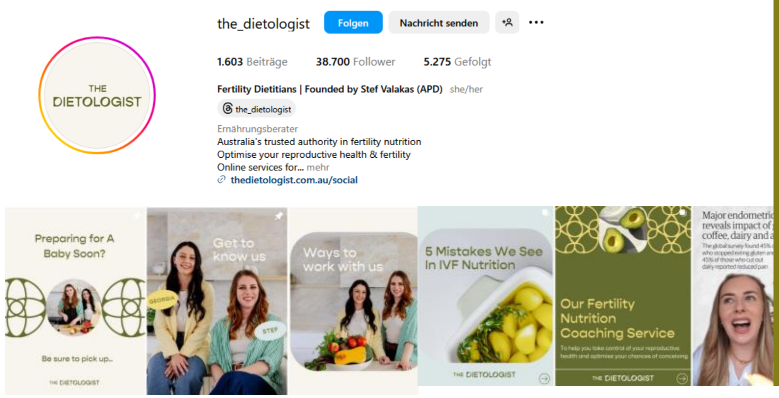
Steph Claire Smith, Australian model, fitness influencer, and entrepreneur renowned for her contributions to health and wellness. Gained prominence through Instagram, leading to a contract with Chadwick Models. She co-founded Keep It Cleaner (Kic), a holistic health and wellness app. She co-hosts the Kicpod podcast with topics ranging from personal experiences to health advice.

Comprehensive and versatile education from fertilization to post partum providing positive attitudes and warm feelings.

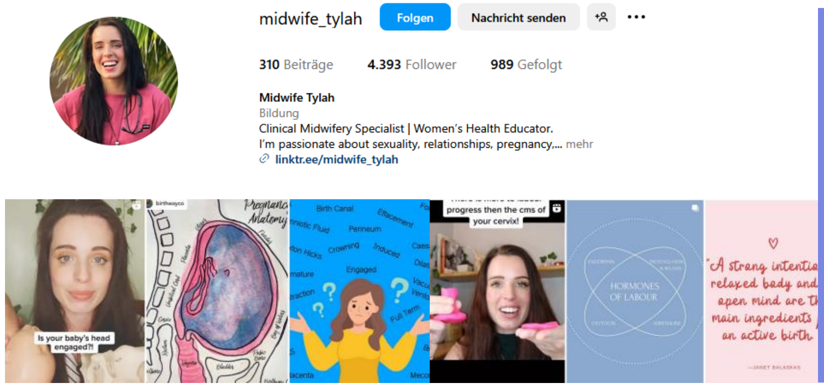
Creators & Influencers: Health care professionals



Dr. Lynn Burmeister is an Australian fertility specialist and founder of Number 1 Fertility in Melbourne. With over 20 years of experience, she trained at Monash University and the Royal Women's Hospital. Known for her personalized approach, she is dedicated to helping patients achieve their fertility goals.



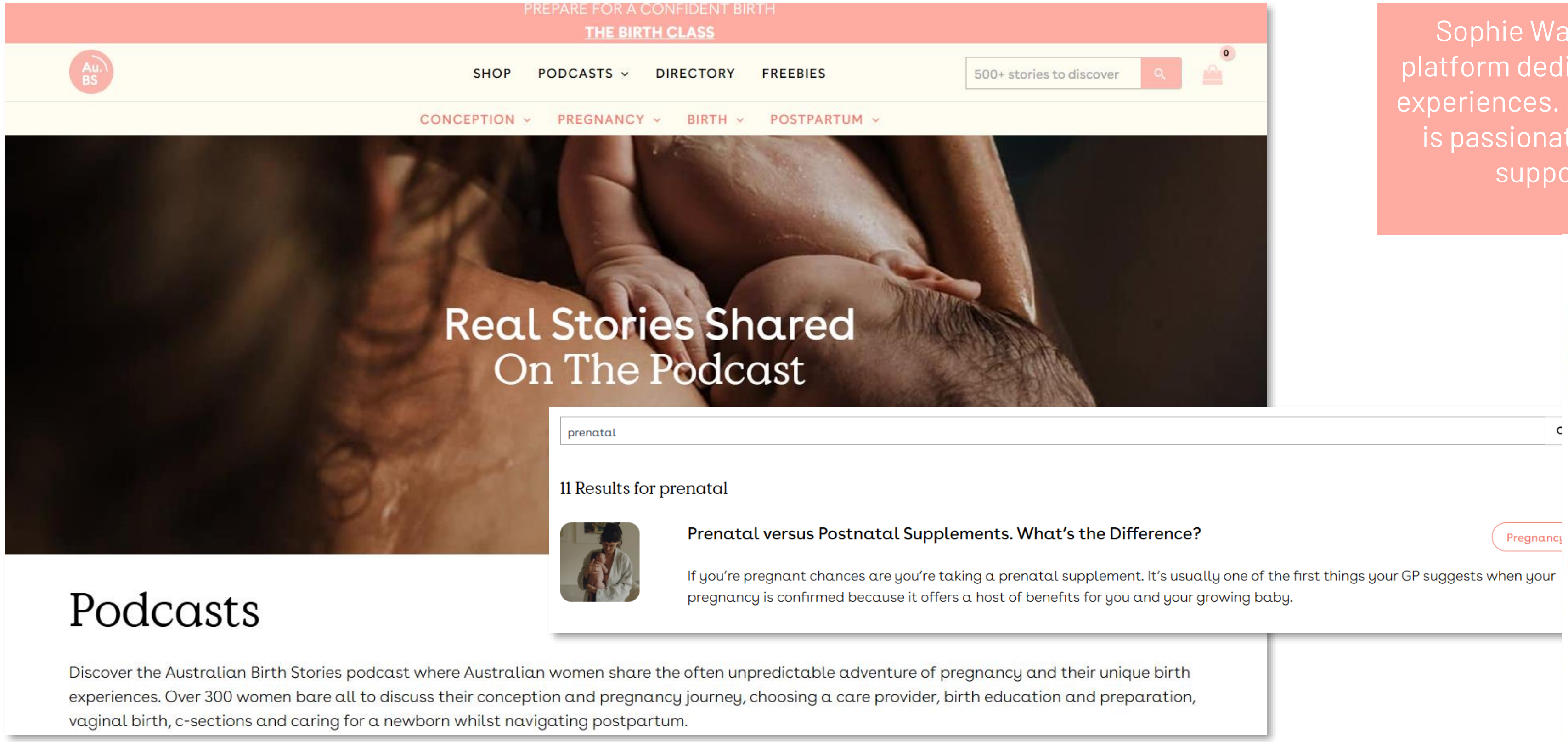
Stefanie Valakas, dietitian and nutritionist based in Sydney, specializing in fertility, pregnancy, and reproductive health. Founder of The Dietologist, a virtual nutrition practice dedicated to supporting reproductive health journeys. Host of "Fertility Friendly Food," podcast offering evidence-based advice on nutrition for fertility.



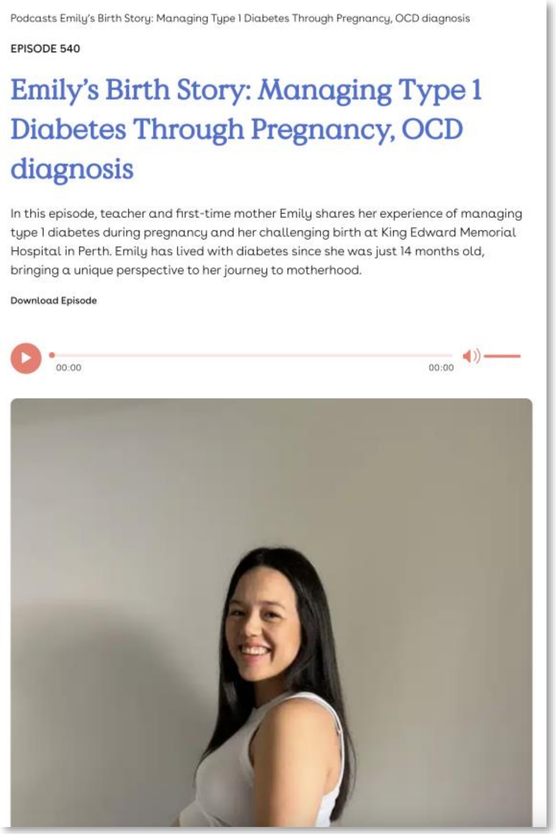
Midwife Tylah is a registered midwife and lactation consultant who creates educational TikTok / Insta content focused on pregnancy, birth, breastfeeding, and postpartum care. Her engaging and informative videos aim to empower and support expectant and new parents with expert advice.

Sophie Walker is the founder of Australian Birth Stories, a platform dedicated to sharing diverse narratives of childbirth experiences. She holds a Master's degree in Public Health and is passionate about encouraging pregnant women and their support networks to actively prepare for birth and the postpartum period.

Australian Birth Stories – Community Building at its Best



Sophie Walker is the founder **of Australian Birth Stories**, a platform dedicated to sharing diverse narratives of childbirth experiences. She holds a Master's degree in Public Health and is passionate about encouraging pregnant women and their support networks to actively prepare for birth and the postpartum period.

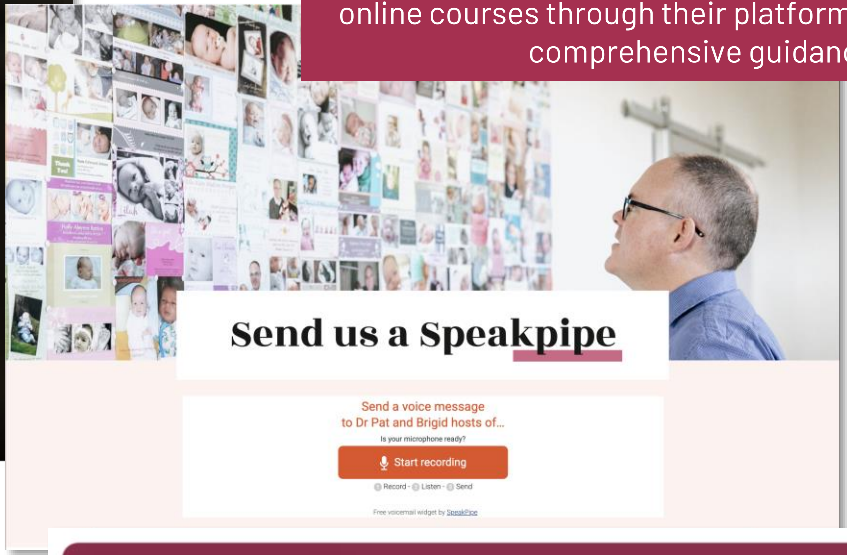


Spotify

A Podcast of Mothers' stories of childbirth. Weekly interviews with mothers giving their first hand accounts of child birth in Australia. Designed to help educate and inform first time pregnant women, parents wanting to have better subsequent births and birth enthusiasts who love to hear and tell birth stories. An entertaining and heartfelt resource for pregnancy, labour and delivery and postpartum.

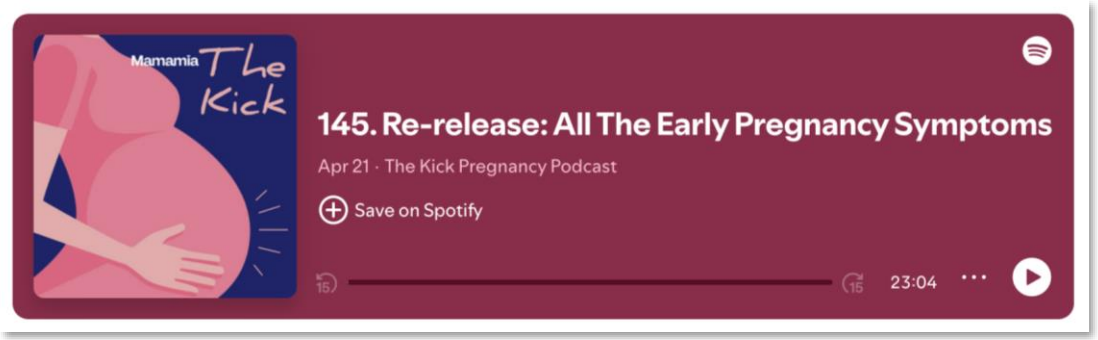
The Kick Pregnancy Podcast – Education You Can Trust

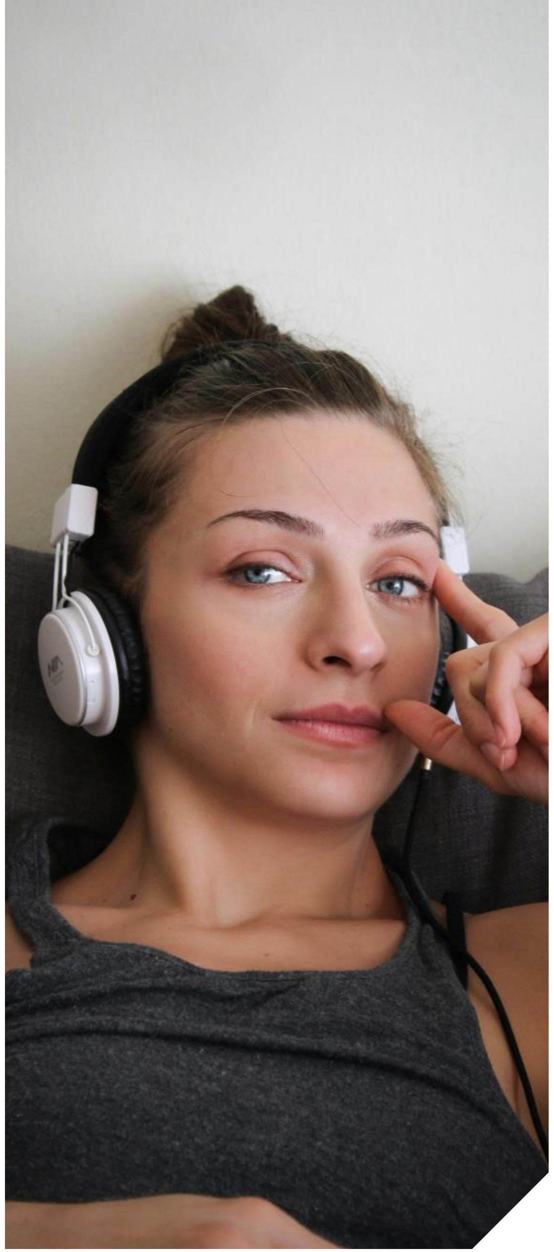
Dr. Patrick Moloney (specialist obstetrician and gynecologist based in Ballarat, Australia) and his wife, Brigid Moloney, co-host **The Kick Pregnancy Podcast**, focusing on essential information about pregnancy and childbirth. They also offer online courses through their platform, GrowMyBaby, providing comprehensive guidance for expectant parents.



Spotify

Everything you need to know about pregnancy and birth. Your host Obstetrician Dr Patrick Moloney and co-host Brigid Moloney focus on expert information about the essentials of growing a baby, with a good dose of relatable chats about their experience of being parents to four boys. Restore your calm and build your confidence during pregnancy and birth and take the next step to becoming a parent.





Deep-Dive On Podcasts

Podcast, the go-to way to get educated!

The importance of educational resources was pointed out as a general hot topic within pregnancy & fertility-related discussions.

While all kind of educational resources are discussed such as books i.e. The Complete Australian Guide to Pregnancy and Birth" and "Whole Food For Pregnancy , specialist to follow (i.e. Midwife Tylah, Midwife Hanna Polites, Dietitian Stefanie Valakas, ...), and marginally vloggers (i.e. Steph Claire Smith), the main attention goes to podcasts. To notice the multiple mentions "Australian Birth Stories" and "The Kick" for the podcasts.

Hey there! I was beyond excited to find out that I'm expecting this weekend. I tried for two years with an ex and was told I wouldn't conceive without medical intervention. Six months in with a new guy. Boom. I work two jobs and have no time to read, but I was wondering if anyone's found good ***podcasts*** *I can listen to while working? Thanks in advance! (reddit)*

*"**The Kick** & **Australian birth stories** are my favourites (I'm clearly an Aussie). My husband really liked the kick - it's run by an OB and his wife and they do bite sized episodes on topics related to pregnancy/birth (eg pre eclampsia, first trimester symptoms). Although Australian birth stories are obviously focused on the Australian healthcare system there are over 400 women's stories of pregnancy and child birth and you can search by specific topics of interest too (eg home birth, preterm birth, PPD). (reddit)*

There are a few podcasts that are Australian based that are very informative and entertaining that I found valuable the first time round. Someone mentioned ***Australian Birth Stories*** *which have different women's experiences on their pregnancies & births. I also found* ***The Kick*** *great and includes information about pregnancy, birth and the early days with a focus on Australian medical system, standards and expectations. It is an Obstetrician and his wife so you get the medical side and also the women/mother side." (reddit)*

back to overview

DEEP DIVE PRICE

While brand satisfaction is strong, 1 in 4 women would not consider buying Elevit (again) – mainly due to its high price

Financial Insecurity is Frequently Discussed on Social Media

Often discussed topic, but in very different contexts and not in the context of supplements.

The declining Australian birth rate explained by the financial crisis

Beside global trends and cultural shifts leading to changing attitudes towards parenthood, the financial crisis and related economical factors specific to Australia are discussed as a key reason for the alarming birth rate decline.

According to debates, rising living costs, housing affordability issues, and job insecurity are leading many Australians to delay or reconsider having children.

> *Discussion: Has the current state of homelessness in Australia made anyone else decide to not have children? (reddit)*

Unplanned pregnancy might lead to financial insecurity*

Especially young couples, not yet financially settled as well as single mom raise the topic of financial insecurities. Users seek for tips, mental support, but also arguments to for pregnancy termination trade-off.

Such discussions underline the impact of financial instability especially postpartum and not during pregnancy, since Medicare cover most of the essential pregnancy related costs.

> *Pregnant and looking for advice on housing and financial assistance: My partner and I just found out we're expecting on June 18th! The problem is we're both still living with our parents. She just finished her third year of uni and plans to defer for a year, while I'm making around $1200–$1500 a week after tax but still building my career. (reddit)*

High costs for IUI/ IVF intenders

In case of intended IUI/ IVF due to advanced maternity age and infertility many consumers find it challenging to navigate the healthcare system, including understanding what is covered by insurance (public or private), finding the right healthcare providers, and managing appointments and tests.

Widely discussed spendings reveals financial concerns for IUI/ IVF trade-offs.

> */…/ My friend did 10 rounds with a private IVF clinic, paid $10,000 a round. No success. 7…7 After ttc for 10 years I went with Adora and had great results, Pregnant first cycle. The entire ivf journey including medication was $2450. We did the ICSI. Maybe you could consider looking around and trying a new clinic? /…/ (reddit)*

Perceived low state financial assistance for pregnancy and other womanly related spendings

Users debates about the fact that the government doesn't fund most contraceptives and menopause indications and medications.

The topic often occurs along late pregnancy discussions: Many posts reflect on the personal decision-making process regarding whether and when to undergo NIPT, considering cost factor (approx. AUS$ 400,-/ 500,-).

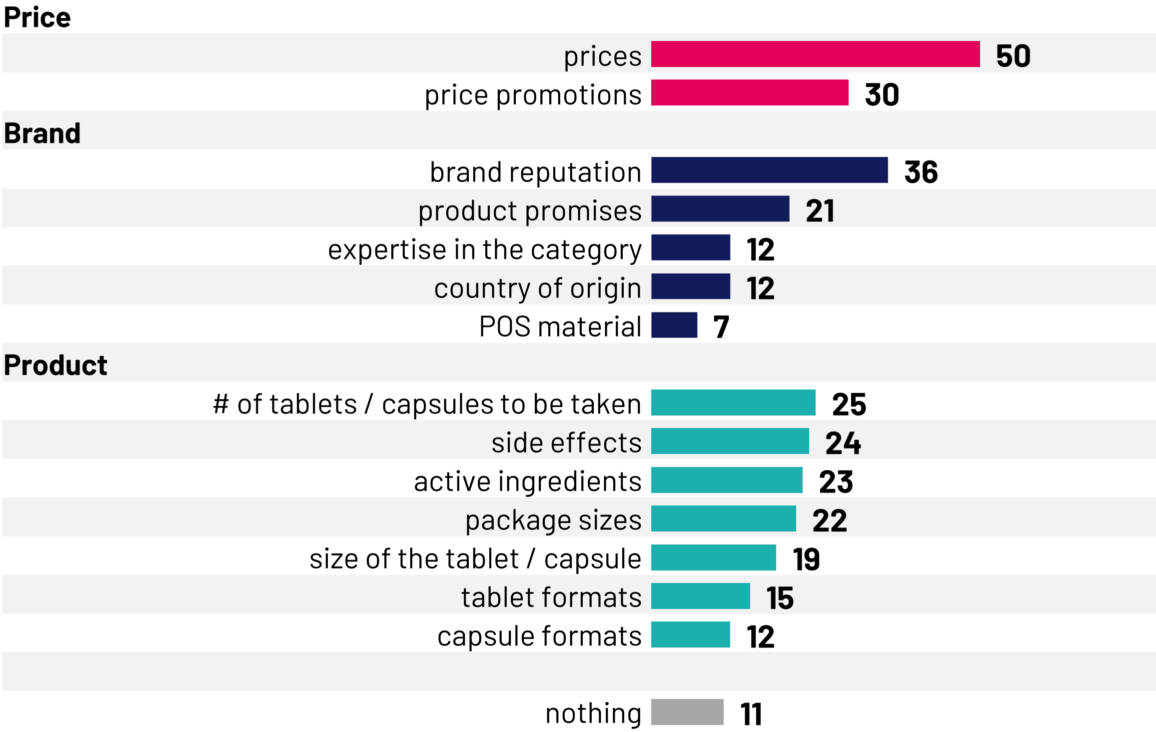
> *Dr told me it would be around $400 if I wanted one, so I'm guessing not. He did say based on the Nuchal scan that he didn't think that the NIPT would be beneficial in his opinion. (reddit)*

Half of the Australian PMVS users compare prices at the POS

POS Behavior

Recommendation Received

At the Last Purchase, did you **compare** any ...



Results in %
Base: All respondents, n=901 PMVS users p12m AUS
Q15: Please think again about the last time you bought CATEGORY, did you compare any of these features / attributes before you decided on the brand to buy?

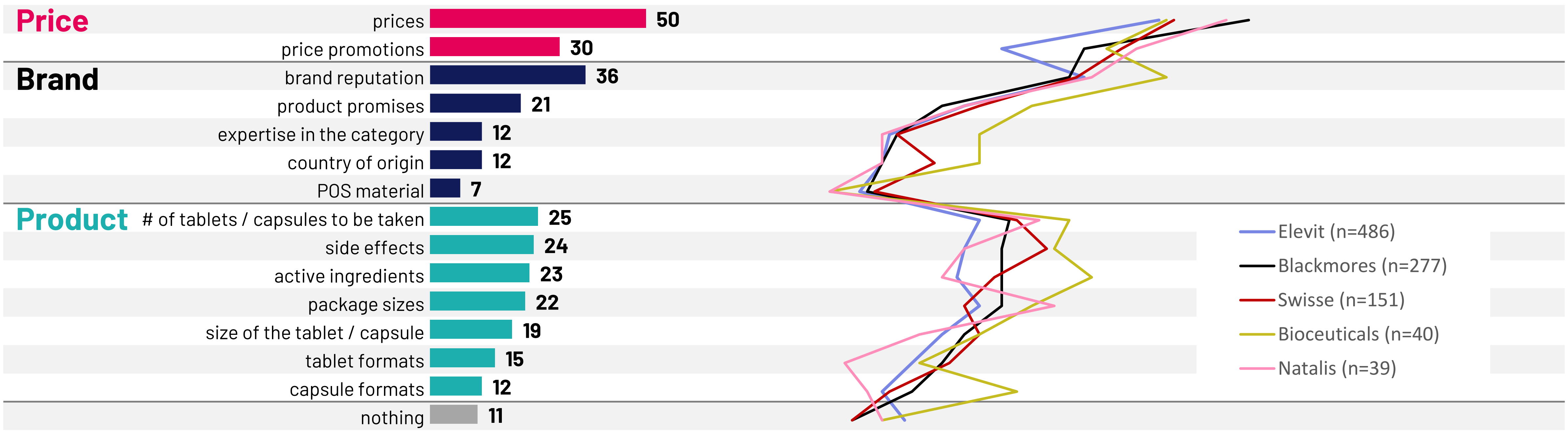
Brand users differentiate by in-store behavior, particularly when it comes to price and promotions.

POS Behavior – by Brand Users

Recommendation Received

At the Last Purchase, did you **compare** any ...

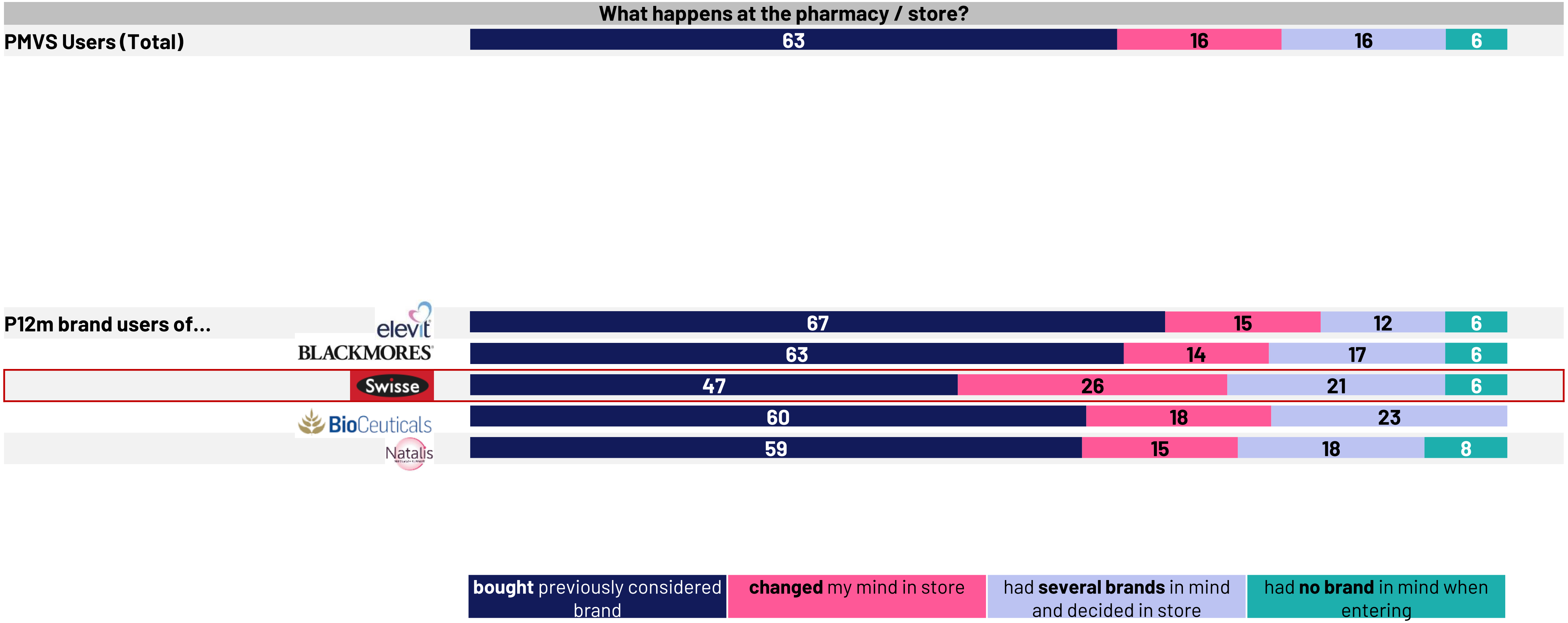
among p12m brand users of...



Results in %
Base: All respondents, n=901 PMVS users p12m AUS
Q15: Please think again about the last time you bought CATEGORY, did you compare any of these features / attributes before you decided on the brand to buy?

2 in 3 entered the pharmacy with a brand in mind and bought it – lowest among women with fertility issues (19% change their mind in store).

Key Moments of Purchase Decision Making AUS



Results in %,
Base: All respondents, n=901 PMVS users p12m AUS
Q19: Before actually buying, did you consider a specific brand to buy?

Elevit users are highly satisfied with the brand, but 1 in 4 PMVS users aware of it would not consider using it (again).

Brand Satisfaction & Rejection

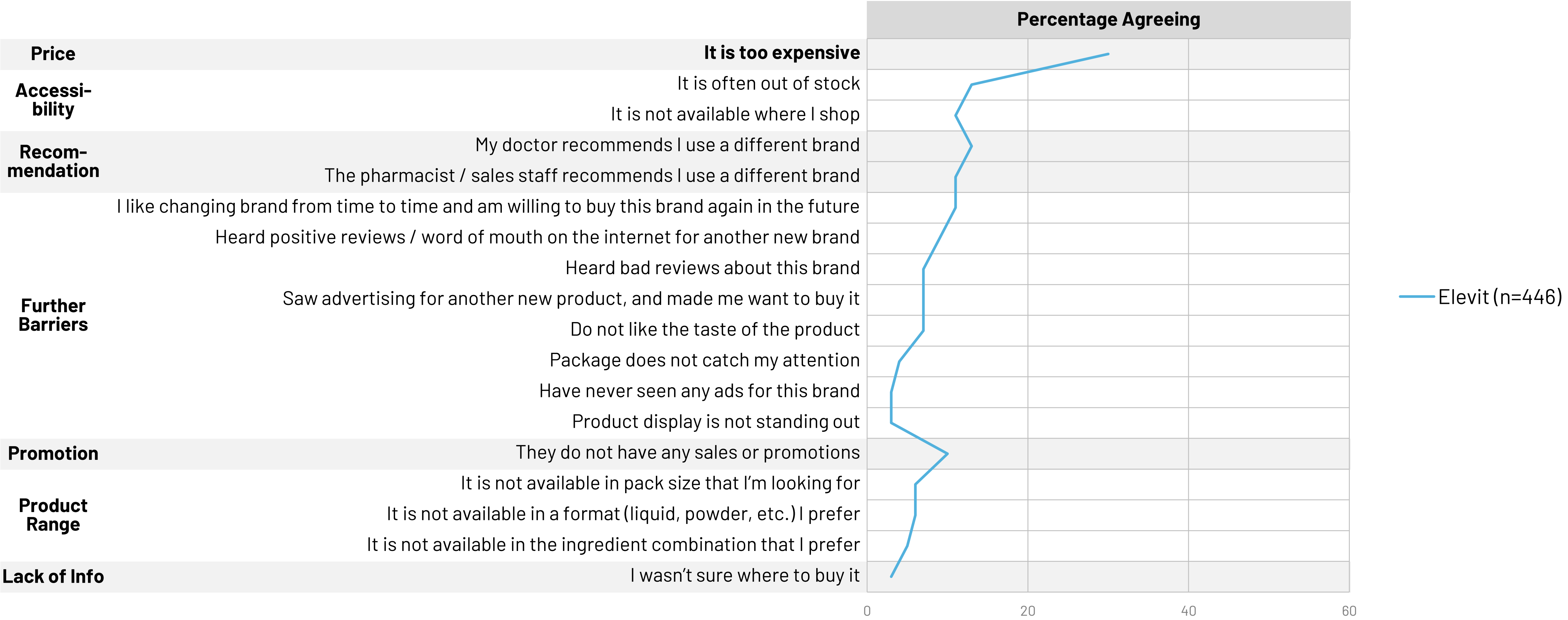
	Elevit	Blackmores	Swisse	Bioceuticals	Natalis	Kin	Nature Made
Brand Users	**49**	**28**	**15**	**4**	**4**	**3**	**3**
	n=486	n=277	n=151	n=40	n=39	n=32	n=30
(Completely) satisfied	**81**	**85**	**78**	**90**	**82**	**72**	**77**
Brand Rejection	**27**	**12**	**7**	**1**	**1**	**1**	**2**

Greatest brand barrier is its **price:**
30% say Elevit is too expensive

Results in %,
Base: Brand users p12m
Q27: To what extent are you satisfied or unsatisfied with each of the following brands of ... that you used in the past 12 months?, Q25: Which of the following brands of CATEGORY would you never consider using, if any, or never using again?

Price perception is the main barrier for Elevit.

Brand Barriers – Elevit AUS

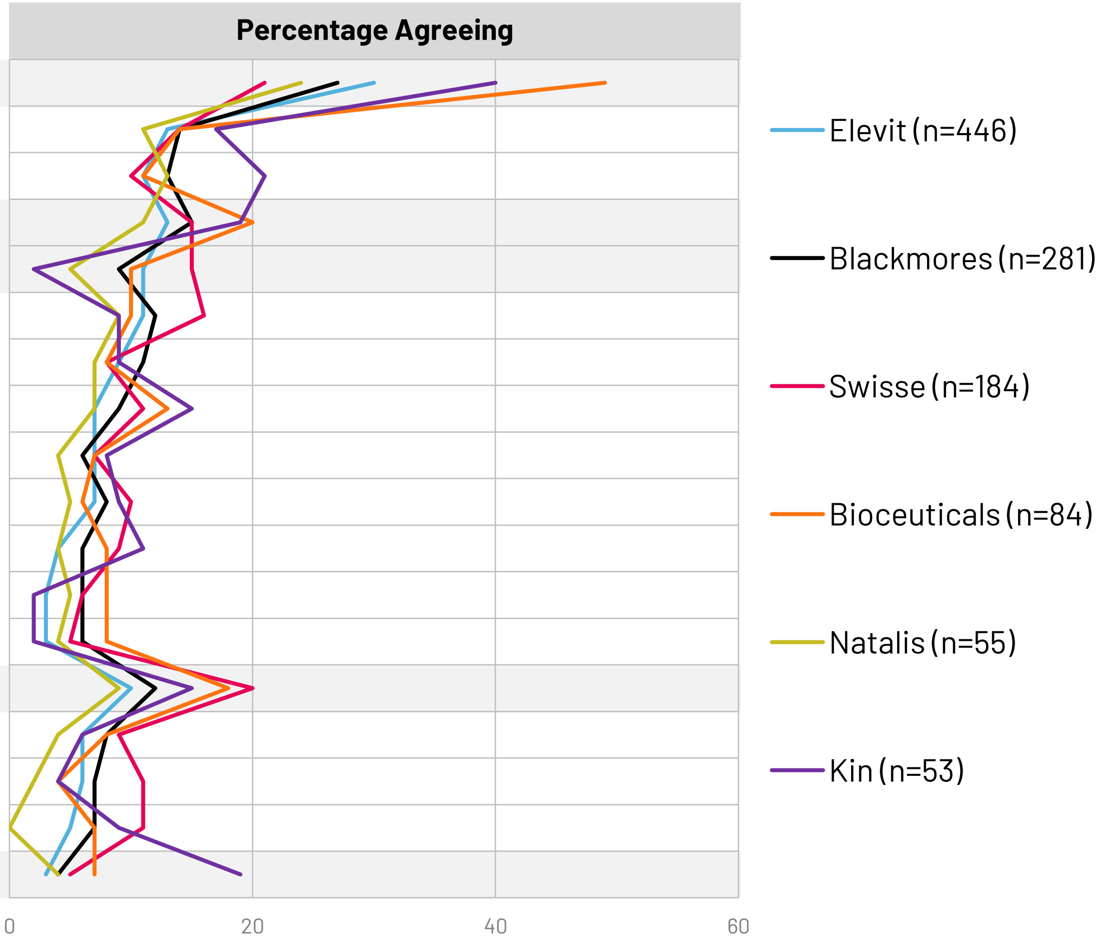


Results in %
Base: Brand Considerer AUS
Q26: Here is a list of reasons that might sometimes stop people from buying a certain brand of CATEGORY. Please indicate for of each brand, if any of the following apply.

Price perception is the main barrier for Elevit and strongest differentiator in the Australian PMVS category with lowest scores for Swisse and Natalis.

Brand Barriers – Key Players AUS

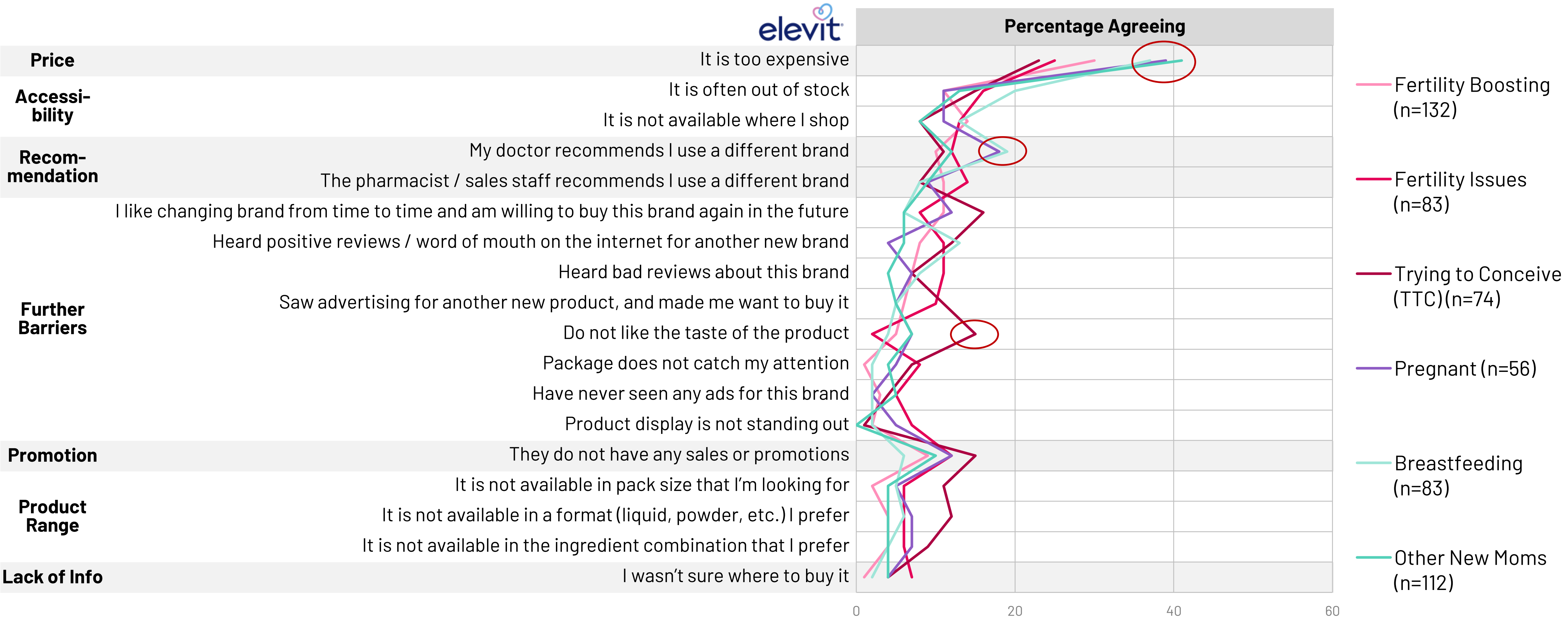
Price	**It is too expensive**
Accessi-bility	It is often out of stock
	It is not available where I shop
Recom-mendation	My doctor recommends I use a different brand
	The pharmacist / sales staff recommends I use a different brand
Further Barriers	I like changing brand from time to time and am willing to buy this brand again in the future
	Heard positive reviews / word of mouth on the internet for another new brand
	Heard bad reviews about this brand
	Saw advertising for another new product, and made me want to buy it
	Do not like the taste of the product
	Package does not catch my attention
	Have never seen any ads for this brand
	Product display is not standing out
Promotion	They do not have any sales or promotions
Product Range	It is not available in pack size that I'm looking for
	It is not available in a format (liquid, powder, etc.) I prefer
	It is not available in the ingredient combination that I prefer
Lack of Info	I wasn't sure where to buy it



Results in %
Base: Brand Considerer AUS
Q26: Here is a list of reasons that might sometimes stop people from buying a certain brand of CATEGORY. Please indicate for of each brand, if any of the following apply.

High price perception is particularly seen by women in later stages.

Brand Barriers Elevit – by Stage



Results in %
Base: Brand Considerer AUS
Q26: Here is a list of reasons that might sometimes stop people from buying a certain brand of CATEGORY. Please indicate for of each brand, if any of the following apply.

Elevit is driven by GP reco and WoM while Swisse benefits from ad recall and special offers and Natalis by its affordability.

Brand Choice Drivers

Which of the following statements best describe why you ended up buying this one and not another brand?

Results in %
Base: Brand users p12m AUS
Q20: Think about the last time you bought [BRAND USED P12M] - Which of the following statements best describe why you ended up buying this one and not another brand?

Natalis is more often selected at the POS by those comparing.

Social Media Deep Dive On Some Brand Alternative Trade-Offs' Criterias

Number of tablets/capsules matter!
A matter of preference?

- Some brands (like **Elevit** and **Natalis**) offer a **one-tablet dose**,
  - which is convenient,
  - but may cause nausea if not taken with food.
- **Blackmores** requires **two capsules**, and are for some users perceived being easier to swallow, due to their size or shape.

> *i started with elevit, switched to natalis (same ingredients but cheaper and australian) and then switched to blackmores right at the end and into postnatal. natalis and elevit are one tablet, must be taken with food otherwise i got sick. blackmores you take two but i find they go down easier.*
>
> reddit

Preference for Australian Made at lower price!

- Trade-Offs against Elevit (with perceived identical posology and dosage) and in favour of Natalis might be impacted
  - by the **higher price positioning of Elevit**
  - and the reassuring **Australian brand origine of Natalis**

> *Brands are different here in Australia but most prenatals come in two capsules = 1 daily serving, with slightly different biases towards certain nutrients.. so we diversified them. Instead of 2x capsules of Blackmores Pregnancy Gold or 2x capsules of Bioceuticals InNatal, we take one capsule from each brand per day. The former has more minerals and DHA while the latter has more choline and other vitamins. That way we're not relying entirely on any one brands formula and we don't overdo certain ingredients like Selenium or Vitamin A.*
>
> reddit

So how can elevit carve out its competitive edge and justify its premium positioning?

The brand image perception can give insights (s. following slide)

What does Elevit stand for in Australia?

Top Image Statements Elevit AUS

	Agreement
safe to use	79%
is widely **available** across channels	74%
is the **expert** for healthy baby development	72%
recommended by **doctors**	71%
is **effective**	71%

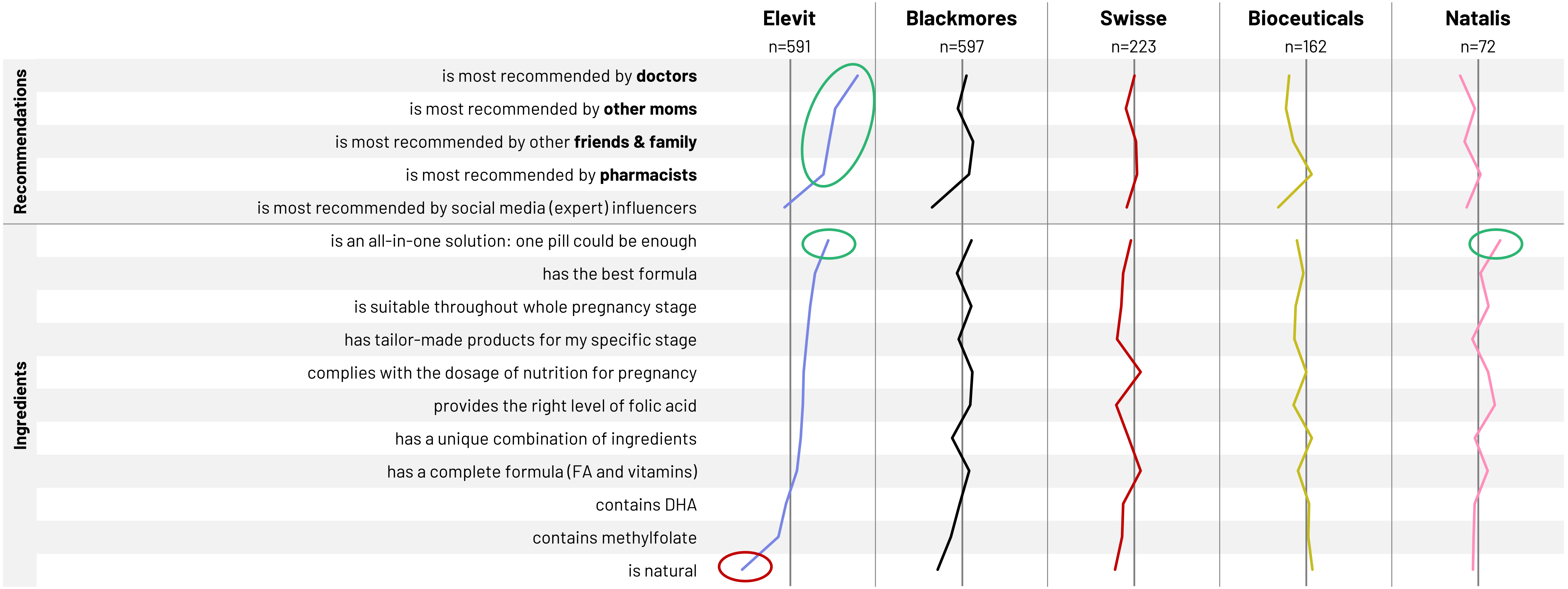
But what if we **remove the halo effect** for elevit being the strongest PMVS brand in Australia?

And what if we also **remove** the higher **relevance of hygiene factors**, that do not really help Elevit create a competitive edge?

Let's look at relative strengths & weaknesses to carve out Elevit's USP:

Elevit shows a strong relative strength in being recommended by HCPs as well as friends & family and relative weakness in being seen as natural.

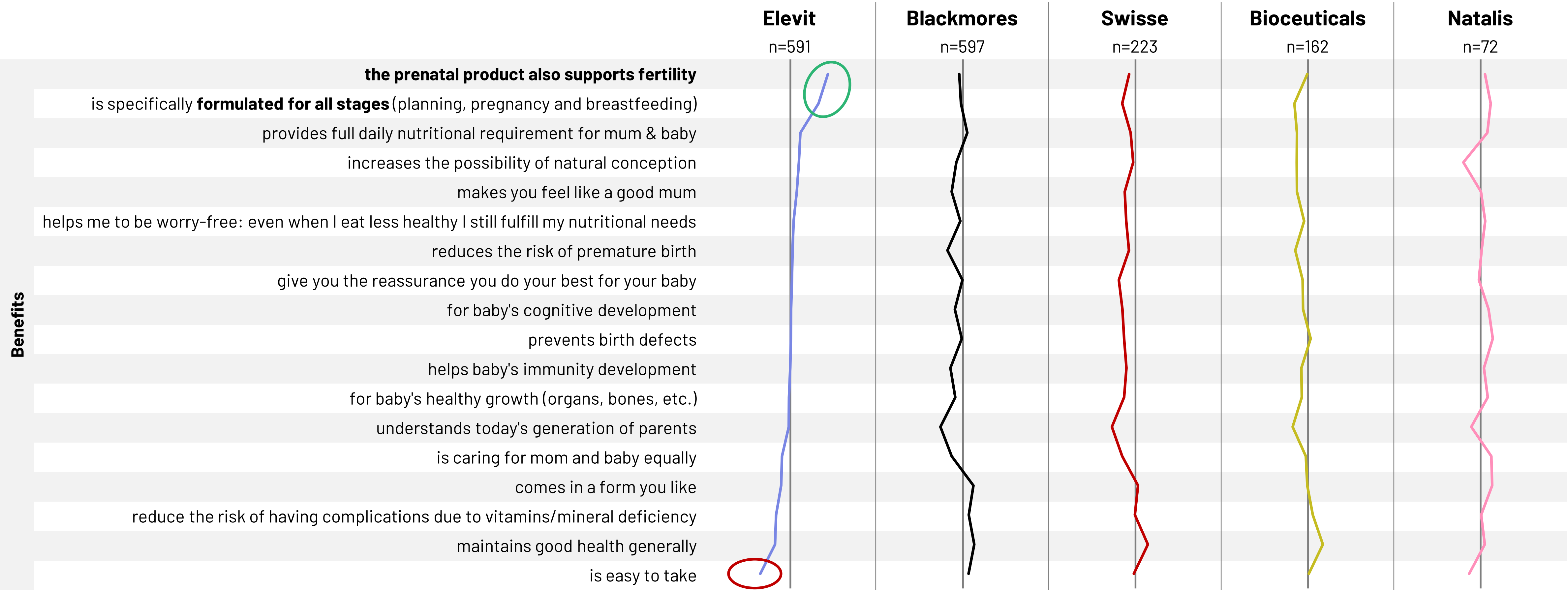
Brand Image Strengths & Weaknesses - Elevit vs. Key Competitors / 1



Results in %, normalized scores showing relative strengths & weaknesses per brand
Base: All respondents, PMVS users p12m AUS
Q39: Please look at the following statements and the brand(s) of CATEGORY you know.

Elevit has a key competitive edge regarding “also supporting fertility” and being “formulated for all stages”.

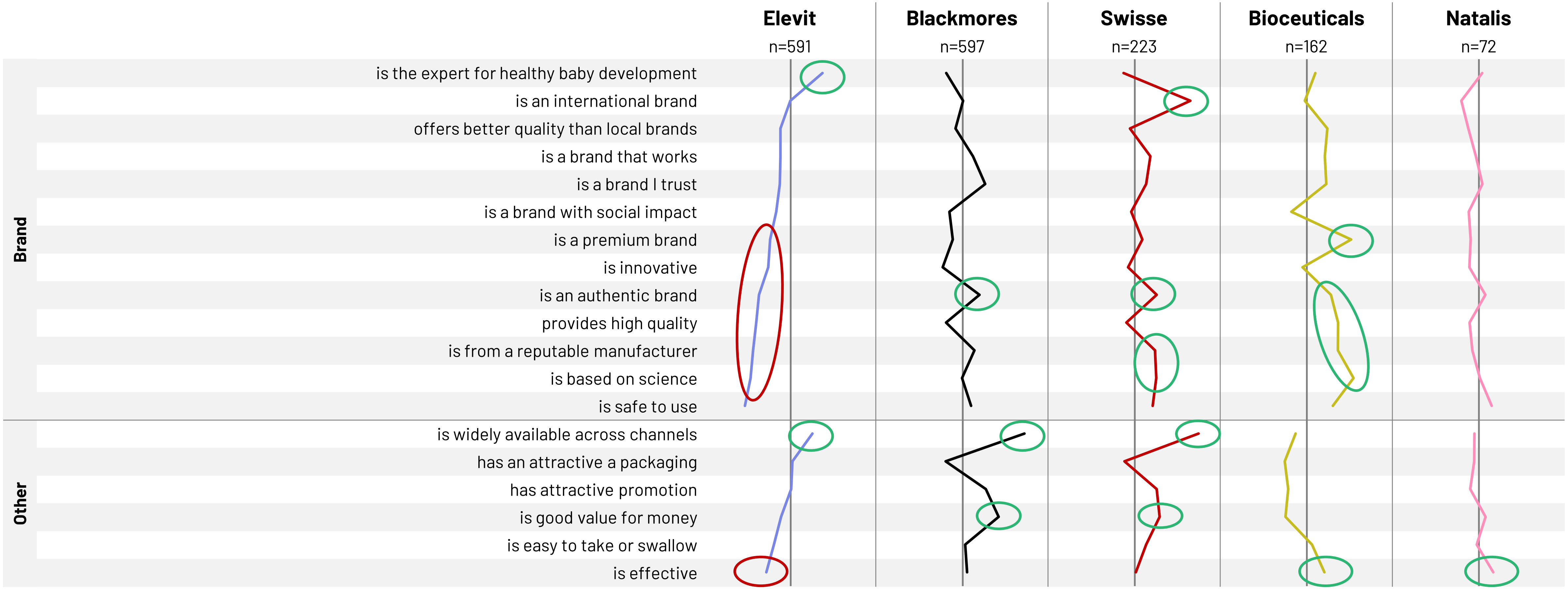
Brand Image Strengths & Weaknesses - Elevit vs. Key Competitors / 2



Results in %, normalized scores showing relative strengths & weaknesses per brand
Base: All respondents, PMVS users p12m AUS
Q39: Please look at the following statements and the brand(s) of CATEGORY you know.

Elevit has a competitive edge in being the expert for healthy baby development, but is relatively weak on innovation, scientific quality and perceived effectiveness.

Brand Image Strengths & Weaknesses - Elevit vs. Key Competitors / 3



Results in %, normalized scores showing relative strengths & weaknesses per brand
Base: All respondents, PMVS users p12m AUS
Q39: Please look at the following statements and the brand(s) of CATEGORY you know.

Social Listening confirms the importance of "Australian quality" credentials

Brand Deep Dive On Blackmores

Blackmores lost its Australian origin and Autralian made quality credentials

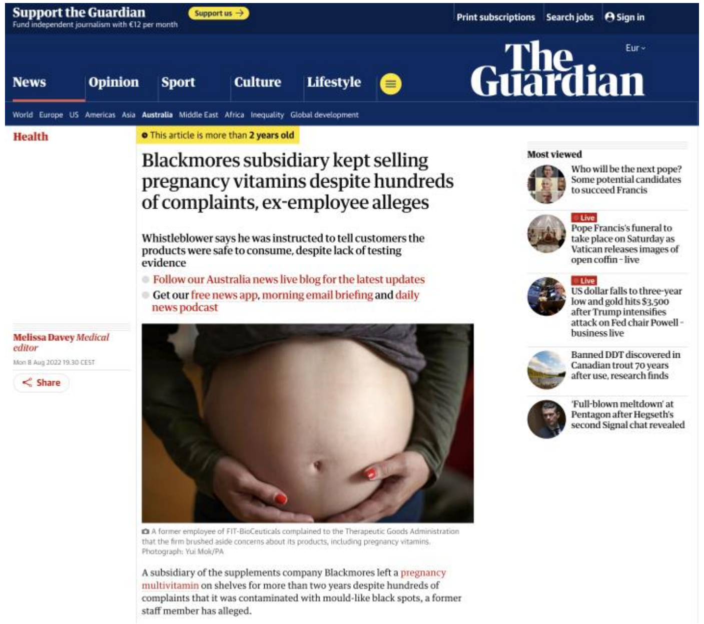
While Blackmores is still perceived as a brand with strong Australian roots, often promoting itself as Australia's number one in health supplements, there is some consumer awareness that since 2023 the company is owned by Japanese brewer company Kirin.

This awareness might have and continues to negatively affect the brand's authenticity and commitment to Australian values, hence, to influence purchasing decisions, especially among consumers who prioritize supporting locally-owned businesses and Australian quality credentials.

> *Same with many things that once were Aussie like something as innocuous as health supplements. Blackmores are owned by a Japanese Beer Co now and Swiss by a Hong Kong company. Yet they still promote themselves as Australia's no 1. or feature Australian Celeb's in ads to make it seem like they still have an Aussie connection*

reddit

While quality „Bad-Buzz" and call for boycott #BlackmoresBoykott eventually subsided, they still might have weakened Blackmores



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Health

This article is more than 2 years old

Blackmores subsidiary kept selling pregnancy vitamins despite hundreds of complaints, ex-employee alleges

Whistleblower says he was instructed to tell customers the products were safe to consume, despite lack of testing evidence

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Melissa Davey *Medical editor*
Mon 8 Aug 2022 19.30 CEST
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A former employee of FIT-BioCeuticals complained to the Therapeutic Goods Administration that the firm brushed aside concerns about its products, including pregnancy vitamins. Photograph: Yui Mok/PA

A subsidiary of the supplements company Blackmores left a pregnancy multivitamin on shelves for more than two years despite hundreds of complaints that it was contaminated with mould-like black spots, a former staff member has alleged.

Most viewed
- Who will be the next pope? Some potential candidates to succeed Francis
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- Live US dollar falls to three-year low and gold hits $3,500 after Trump intensifies attack on Fed chair Powell – business live
- Banned DDT discovered in Canadian trout 70 years after use, research finds
- 'Full-blown meltdown' at Pentagon after Hegseth's second Signal chat revealed

Numerous products compete in the Australian DTC market. The brand appearances range from down-to-earth to luxurious and sophisticated.

Popular DTC brands in Australia

EverNatal – A prenatal supplement brand known for its physician-grade formulations. Consumers use EverNatal for its comprehensive prenatal support. The brand addresses needs related to maternal health and fetal development.

Bump Plus – Australian prenatal vitamin brand founded by Marie, a women's health nurse, who collaborated with fertility specialists and industry experts to create a comprehensive prenatal supplement.

Foraged For You – Australian brand founded by nutritionist Sheridan Austin in May 2020, aiming to provide products that nourish the body by reconnecting individuals to the power of real, functional, and fermented foods.

Rainbow Light Daily – The brand is recognized as the number-one most trusted natural vitamin brand and has been a founding partner of Vitamin Angels, supporting global health initiatives.

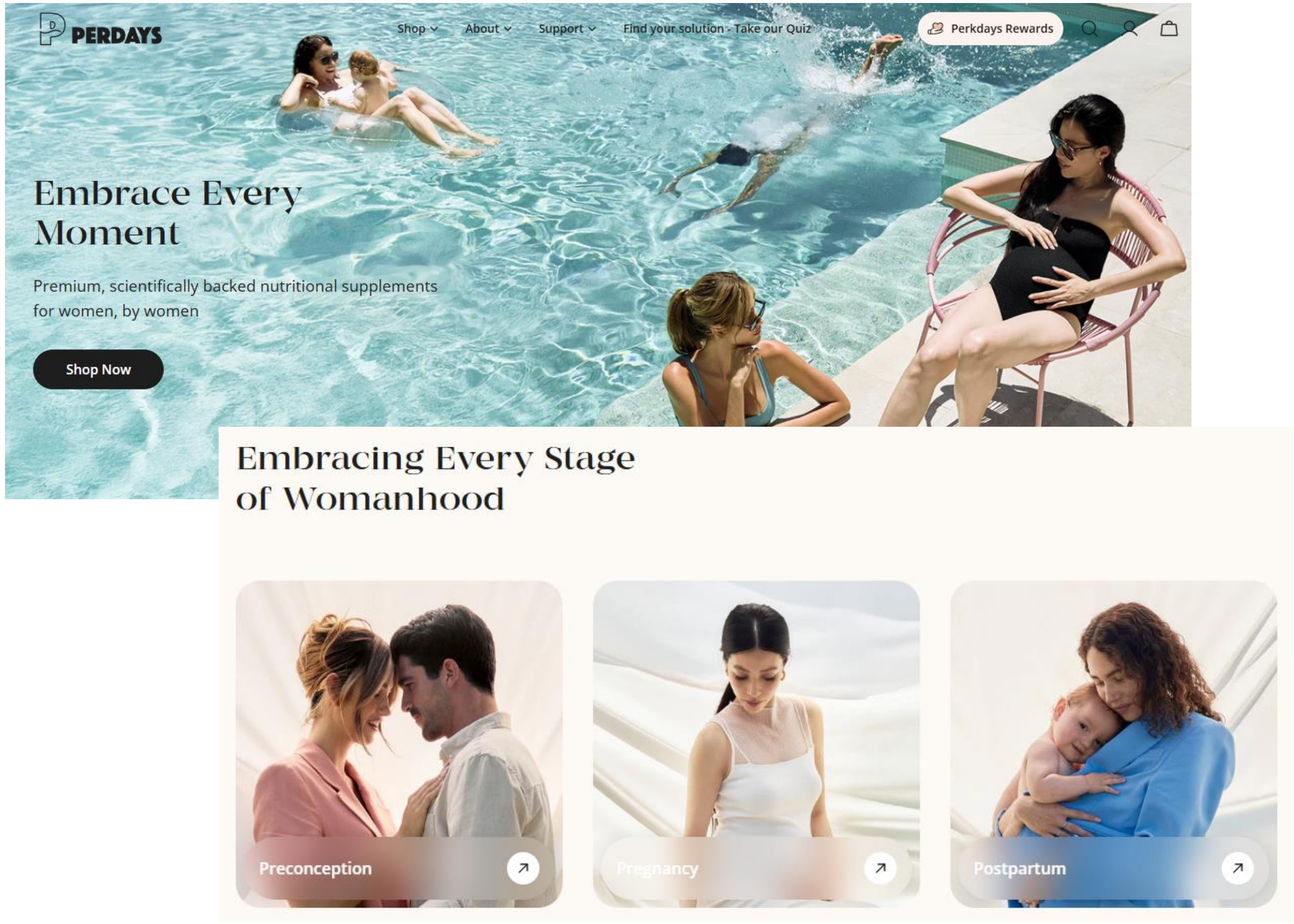
Perdays – Australian company specializing in the development of supplements for pregnant women. Their products utilize called Nutriseal-Caps for delayed release and nutrient protection. a capsule-in-capsule technology

Ovitae – Australian brand founded 2015. Their products are endorsed by the Australian College of Midwives and aim to support individuals throughout conception and pregnancy by providing a unique blend of 25 vitamins, minerals, and antioxidants.

Arxi – Australian brand co-founded by fertility nutrition professionals. The brand offers OvaGold, a preconception supplement designed to support fertility journeys with high-quality preconception supplements with a unique blend of science-backed ingredients.

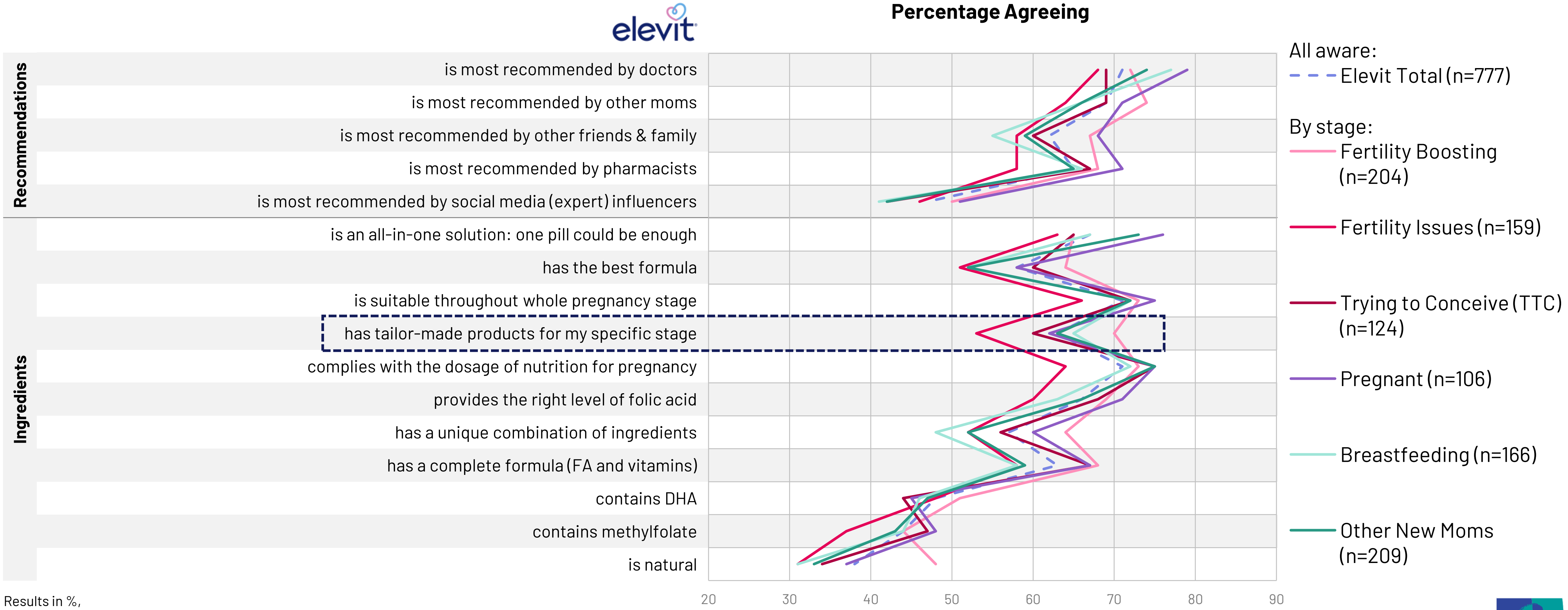
Perdays' brand identity is reminiscent of a lifestyle or luxury brand. The product's packaging could just as well belong to a perfume.

Popular DTC brands in Australia – Spotlight on *Perdays*



Women with fertility issues miss tailored products for their stage. Breastfeeders are least convinced of the unique formula.

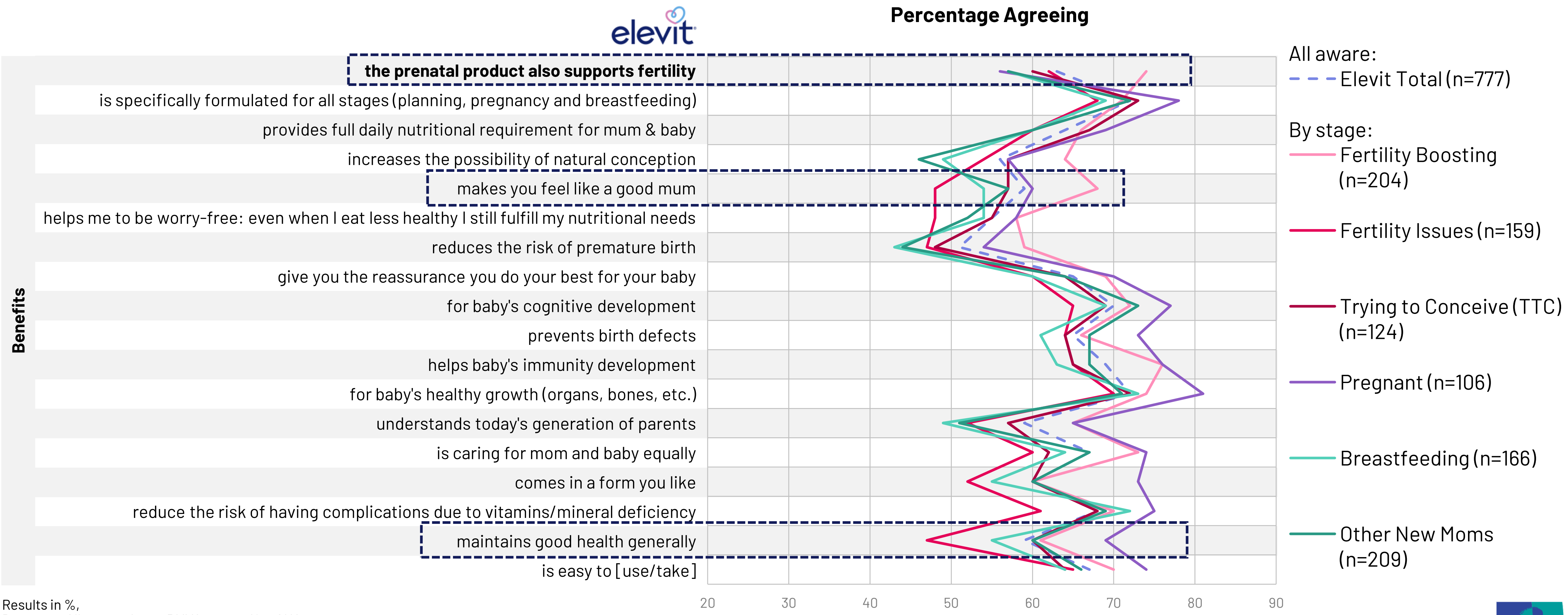
Elevit Brand Image by Stage/ 1



Results in %,
Base: All respondents, PMVS users p12m AUS
Q39: Please look at the following statements and the brand(s) of CATEGORY you know.

Women seeking to boost their fertility strongly agree that Elevit makes them feel like a good mum – in contrast to those with fertility issues. Pregnant women rate Elevit's benefits most positively.

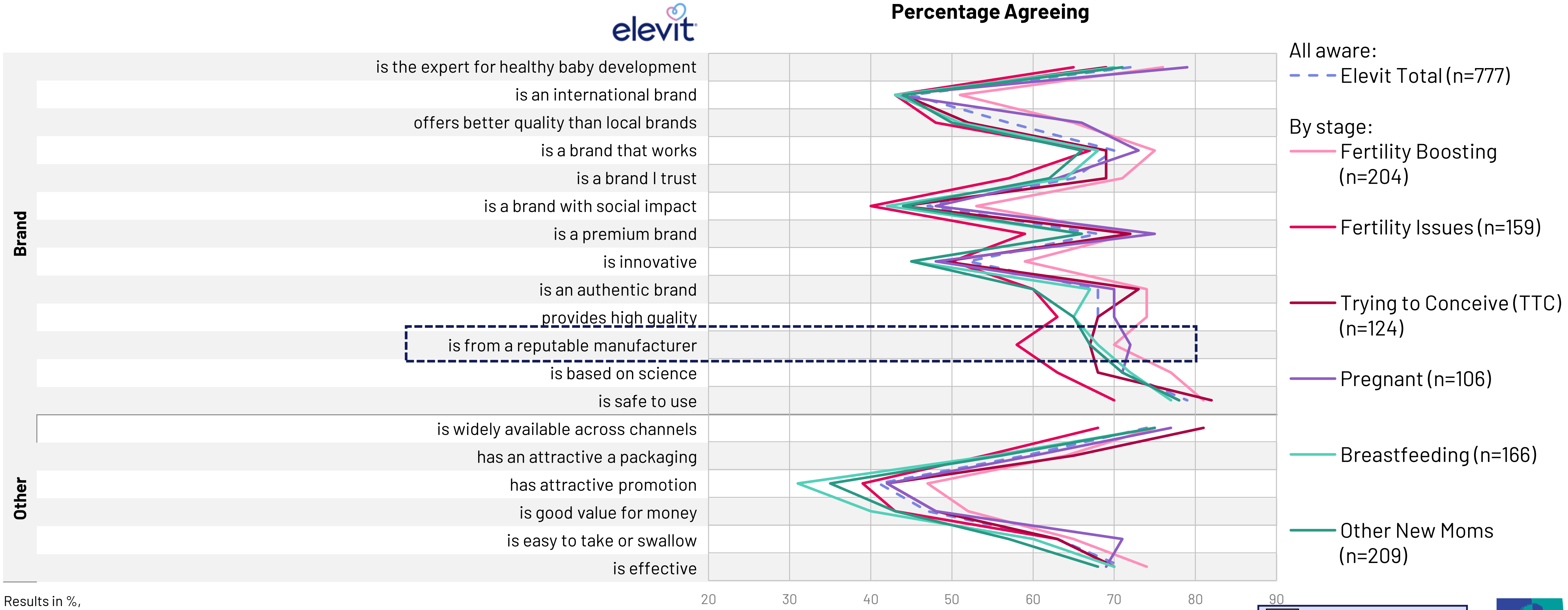
Elevit Brand Image by Stage/ 2



Results in %,
Base: All respondents, PMVS users p12m AUS
Q39: Please look at the following statements and the brand(s) of CATEGORY you know.

Women with fertility issues rate Bayer as much less reputable vs. women in other stages of their pregnancy journey. Breastfeeders miss promotions.

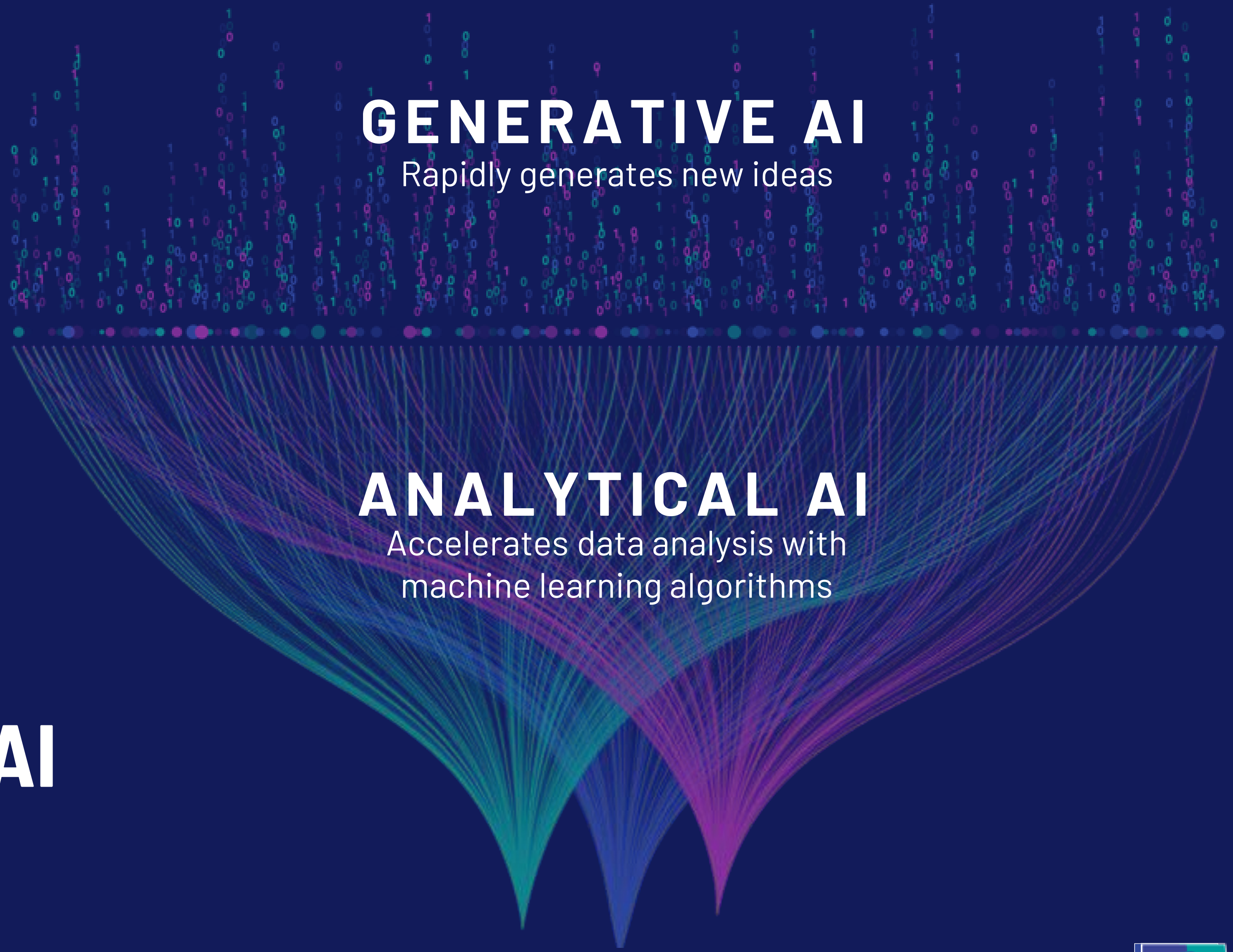
Elevit Brand Image by Stage/ 3



Results in %,
Base: All respondents, PMVS users p12m AUS
Q39: Please look at the following statements and the brand(s) of CATEGORY you know.

OUTLOOK

We want to go a step further and explore unmet needs in PMVS



with INNO**EXPLORER AI**

to fuel the innovation pipeline for Elevit

We are in the process of using the collected data to generate, score and size hundreds of unmet needs in the PMVS domain

EXISTING ENRICHED QUANT SHOPPER SURVEY

PROFILING QUESTIONS

Who (Demo variables)
What Pregnancy Status (Planners, Pregnants, New Moms)
Fertility Stage
Products / brands used

USE

Profiling the Unmet Needs Generated by the AI

WHY IT'S IMPORTANT

Traceability | Who expressed these needs and what is their behavior. Allows us to mitigate the concern that the unmet need is the result of the LLM hallucinating.

CORE DATA:
verbatim of unmet needs and aspiration

GAI/Data Science/ Engineered Prompts

GAI generated Unmet Needs

QUANTIFICATION QUESTIONS

How frequent?
How satisfied with existing solutions?

USE

Sizing and Scoring

WHY IT'S IMPORTANT

Quantifiability | Unmet needs scored on penetration

Example Unmet need: Unwind afterwork without compromising dinner plan with family
Quantification: 24% penetration7 reach, Profiling: Over index on Female (140 index), HH with kids (130 index)

INNO**EXPLORER AI**

Unlock hidden opportunities: Profiling & Prioritizing unmet needs for maximum impact

Transforming consumers unmet needs... ... into validated concepts

STEP 1		STEP 2	STEP 3
Leverage Fresh, **PURPOSEFUL** Consumer Data	**GENERATE** Unmet Needs	**IDEATE** From the Unmet Needs	**DEVELOP** Concepts/propositions
Diving deeper into promising domains with survey data	We summarize and quantify unmet needs.	Generate ideas from selected unmet needs.	Develop concepts, with Ipsos' proprietary database, used to train AI models.

What We Do	Using the current study / exploration of the nutritional supplement shopper journey, where we gather fresh, purposeful consumer data as the foundation. We added specific open-ended questions to the quant survey to explore consumers' unmet needs and aspirations.
	We train generic AI models with consumers' challenges, aspirations, and perceptions in the specific area of Nutritional Pregnancy Supplements. We could also complement the outcomes from the Social Listening Module in the analysis and consider blended data sources.
	Ipsos' data scientists process large amounts of cleaned consumer inputs that are clustered into (un)met needs territories.
What You Get	Once the data is cleaned, we generate **up to 100 unmet needs**. These unmet needs will be clustered into territories and within each territory they are prioritized by Reach. We quantify unmet needs to identify the biggest opportunities. Each unmet need will also be profiled against your target audience or segments.
Collaboration	Ipsos will share the full list incl. scorecards and Bayer can select functional or emotional needs for further innovation, by their viability, scalability, and feasibility. For this proposal we assume to move on with 5 unmet needs finally.

back to overview

THANK YOU.

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