

U.S. MARKET RESEARCH

# KOL Perception

## Microbiome Therapy

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Survey of 25 U.S. KOLs — Gastroenterologists, Infectious Disease, Immunologists & Pharma Researchers

**80%**

Moderate–High  
Awareness

**88%**

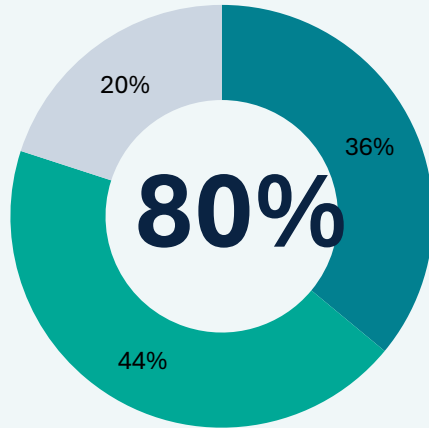
Positive Clinical  
Sentiment

**84%**

Expect Meaningful  
Impact

## Familiarity with Microbiome Therapies

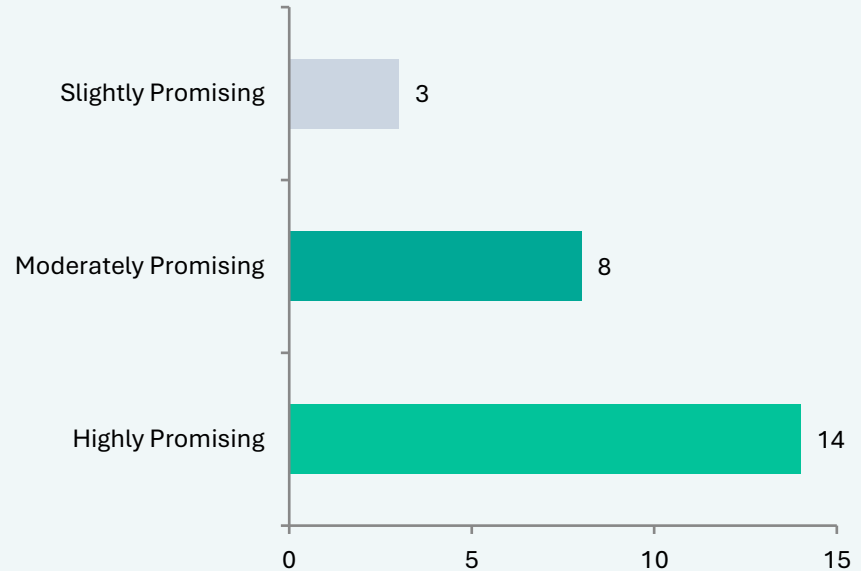
n = 25 KOLs



Very Familiar   Moderately Familiar   Slightly Familiar

## Perceived Clinical Promise

n = 25 KOLs

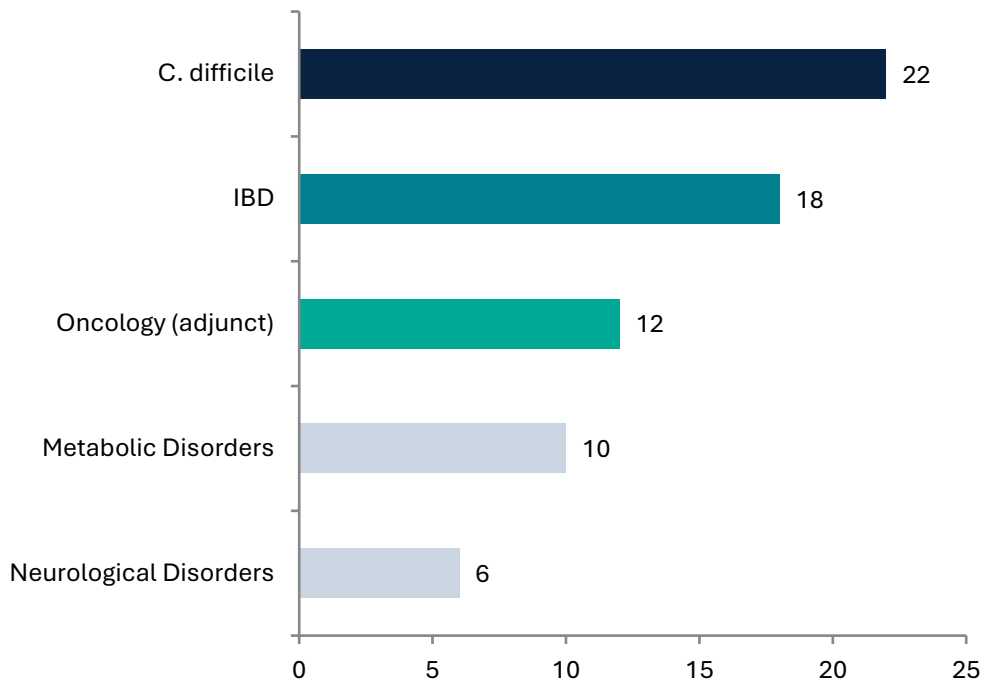


88% positive sentiment — highest optimism in GI & systemic indications

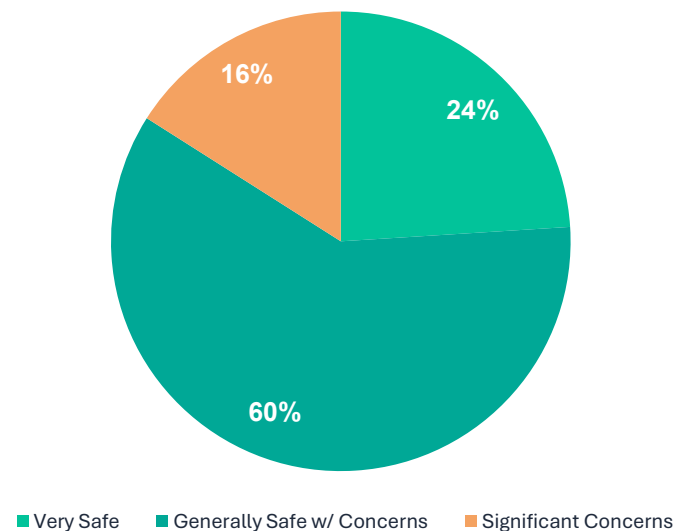
# KEY INDICATIONS & SAFETY PERCEPTION



Top Indications (Multiple Responses, n=25)



Safety Perception

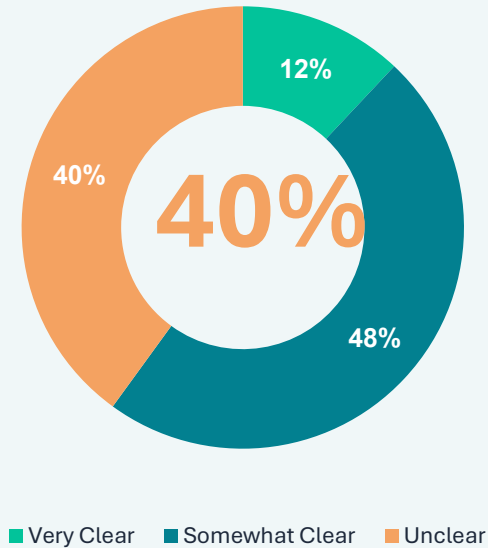


Key Concerns: long-term effects & off-target microbiome changes (60% flag as concern)

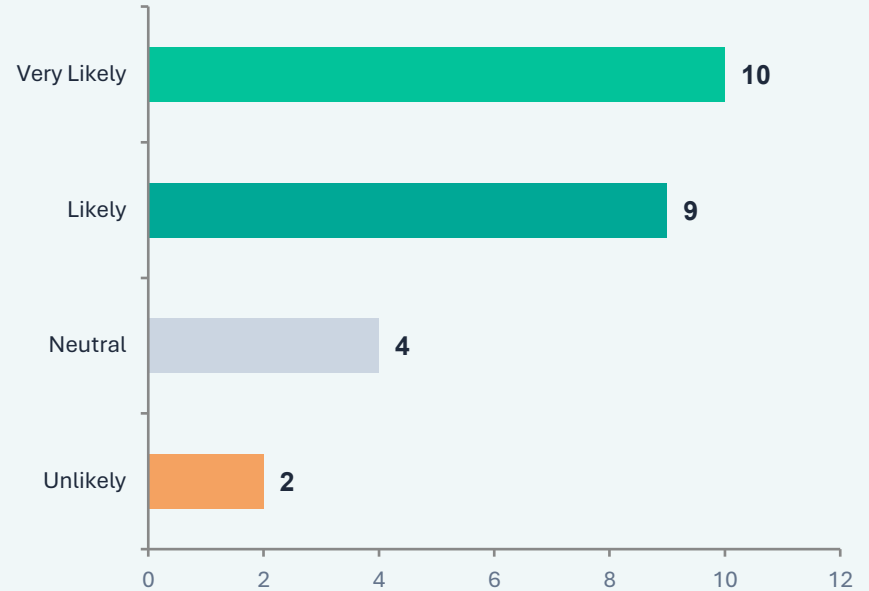
# REGULATORY CONFIDENCE & ADOPTION WILLINGNESS



## Regulatory Pathway Clarity (U.S.)



## Likelihood to Prescribe / Recommend

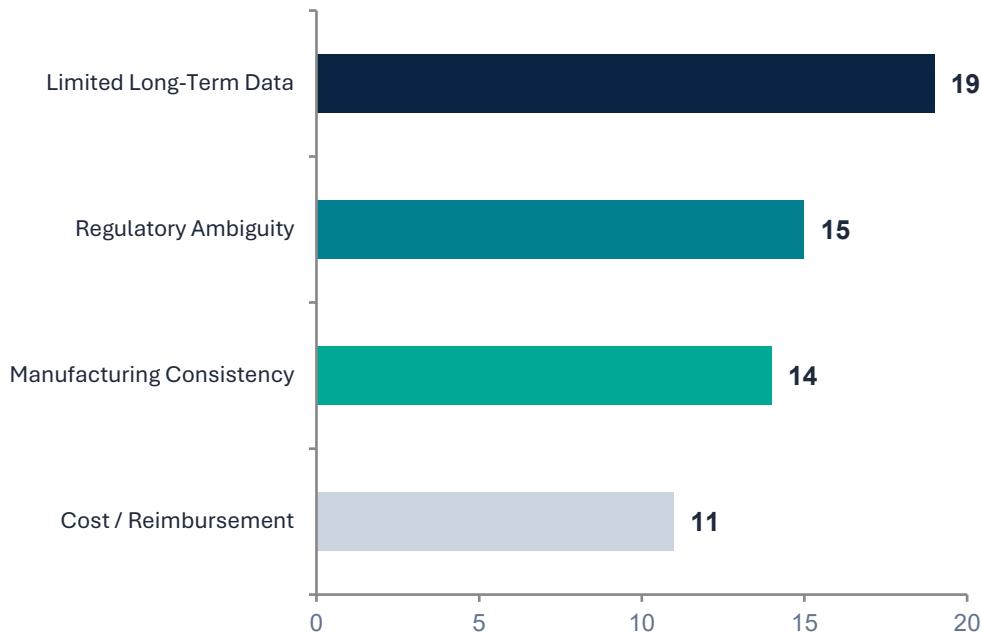


76% willing to adopt — tied to stronger Phase III evidence

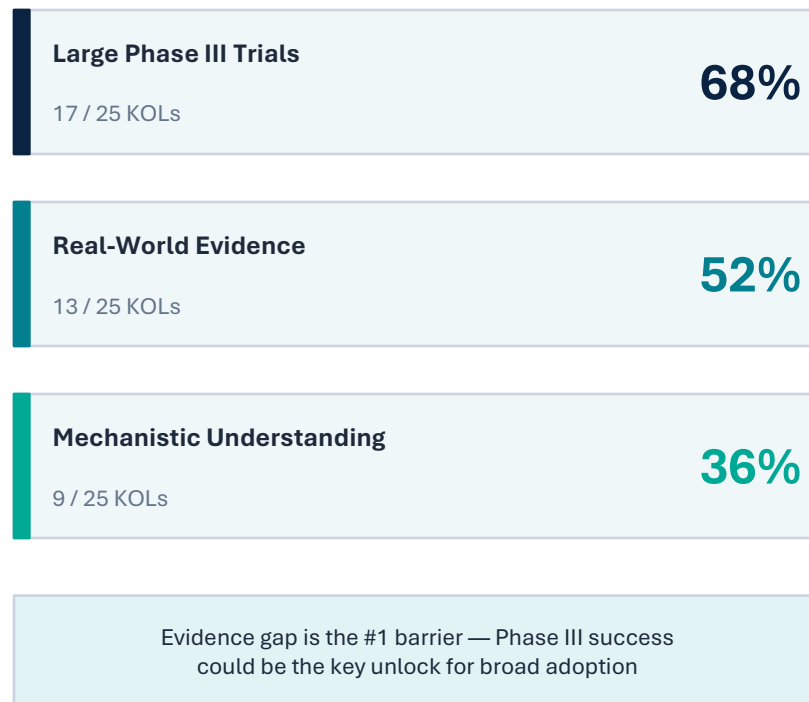
# KEY BARRIERS & EVIDENCE REQUIREMENTS



## Biggest Barriers to Adoption (Multiple Responses, n=25)



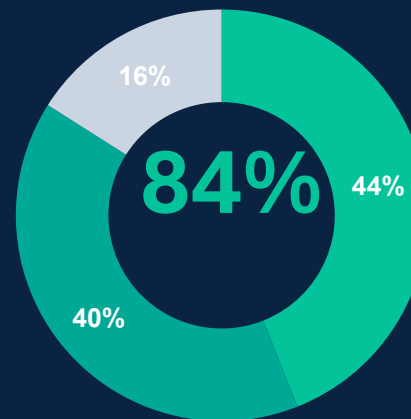
## Evidence Required for Routine Adoption



## FUTURE OUTLOOK & KEY INSIGHTS

# 5 Year Horizon

- ★ C. difficile anchors platform credibility — validated use case
- ▲ IBD & oncology are high-growth, emerging priority areas
- ! Evidence gap & regulatory ambiguity remain the top bottlenecks
- Phase III success + clearer FDA pathways will unlock adoption
- ◆ Field transitioning from experimental to clinically credible



■ Transformational ■ Significant Niche Role ■ Limited Impact



# Thank You

Do you have any questions?

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