



ITC INSIGHTS BRIEF: 2021 CONSUMER SUPPLEMENTS SURVEY

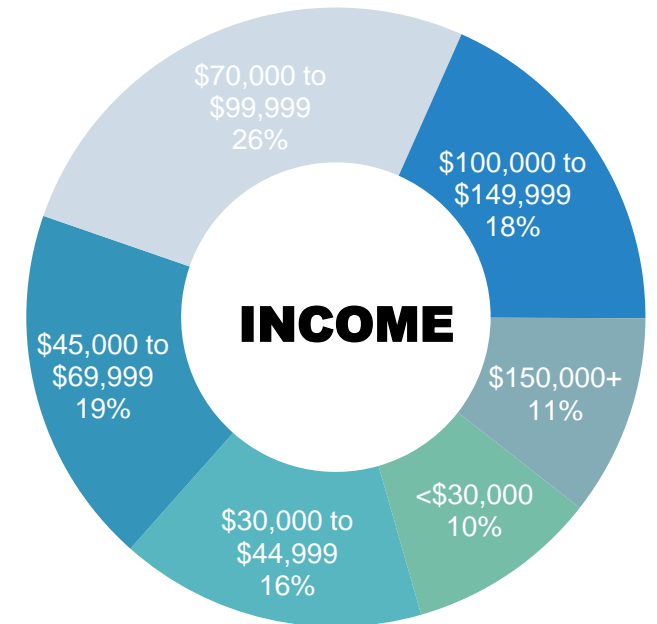
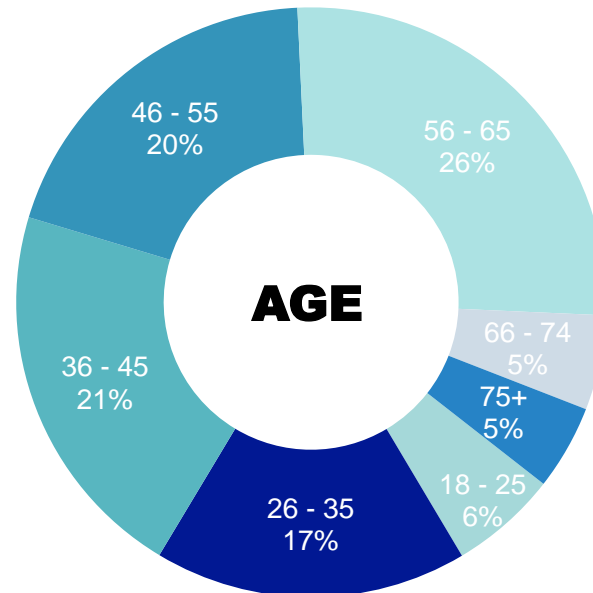
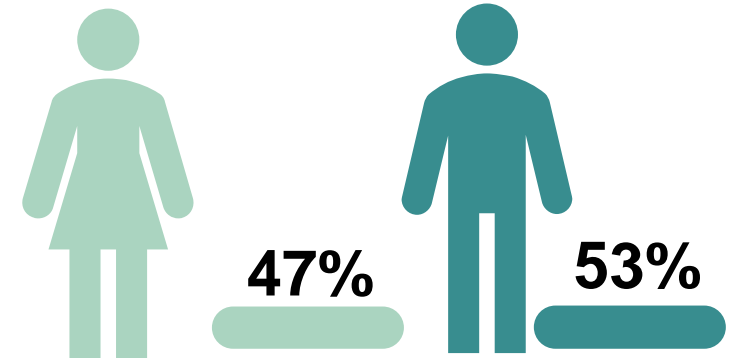
SPOTLIGHT ON HEALTHY AGING

2021 SUPPLEMENT CONSUMER SURVEY



Survey of 2,000 supplement consumers

- 1,000 US
- 500 UK
- 500 Germany



HEALTH CONCERNS



KEY ITC INSIGHTS:

- In 2021, the survey added the response 'no health concerns'
- Lack of energy, insomnia and depression have moved up and when lumped together, indicate that mental wellness is an increasingly important health condition to note and understand
- Joint and other pain was the largest response; despite the pandemic, immunity concerns stayed around the middle of the pack

Traditional Medical Concerns	
Joint or other pain	26%
High blood pressure	22%
High cholesterol	18%
Diabetes	9%
Heart/CV problems	6%
Peri/Menopause	5%
Osteoporosis	5%
Cancer	3%

Mental Wellness Concerns	
Anxiety or stress	23%
Lack of energy	21%
Insomnia/sleep	20%
Depression	16%
Lack of mental acuity, cognition, focus	8%
Memory issues	4%

HEALTH CONCERNS: AGE



KEY ITC INSIGHT:

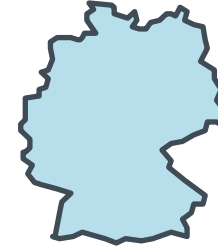
- The health conditions associated with the oldest demographic (joint, high blood pressure and high cholesterol) are predictable, but the strong response for anxiety and stress in the two younger demographics is startling

18-35	
Anxiety/stress	35%
Lack of energy	29%
Depression	23%
Insomnia/sleep	21%
Joint or other pain	16%
Digestive complaints	14%
Lack of mental acuity	12%
Overweight/obese	12%

36-45	
Anxiety/stress	28%
Lack of energy	26%
Joint or other pain	19%
Insomnia/sleep	19%
Depression	19%
Digestive complaints	15%
High BP	15%
Overweight/obese	14%

46+	
Joint/other pain	32%
High BP	30%
High cholesterol	24%
Insomnia/sleep	20%
Overweight/obese	19%
Lack of energy	17%
Anxiety/stress	16%
Digestive complaints	14%

HEALTH CONCERNS: 2020-2021 COUNTRY



2020 US TOP 5	
High blood pressure	24%
High cholesterol	22%
Anxiety/ stress	21%
Joint or other pain	21%
Insomnia/Sleep problems	16%

2020 UK TOP 5	
Joint or other pain	30%
Anxiety/ stress	26%
Lack of energy	25%
Insomnia/ Sleep problems	21%
Overweight/Obese	16%

2020 Germany TOP 5	
Joint or other pain	29%
Insomnia/Sleep problems	26%
High blood pressure	20%
Lack of energy	19%
Overweight/Obese	15%

2021 US TOP 5	
High blood pressure	25%
Joint or other pain	24%
Anxiety/ stress	24%
High cholesterol	23%
Lack of energy	21%

2021 UK TOP 5	
Anxiety/ stress	28%
Joint or other pain	25%
Lack of energy	25%
Insomnia/ Sleep problems	19%
Digestive complaints	17%

2021 Germany TOP 5	
Joint or other pain	31%
Insomnia/Sleep problems	26%
High blood pressure	24%
Lack of energy	19%
Overweight/Obese	19%

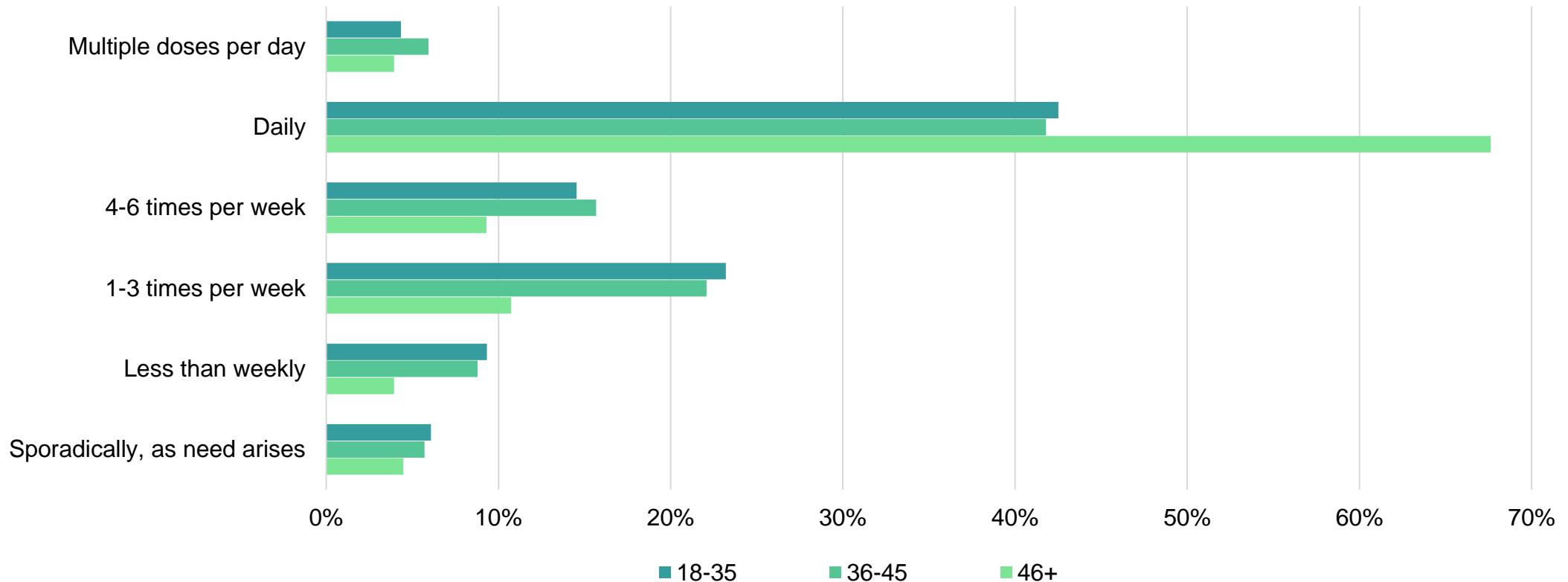
Note: 22% of consumers had no health concerns but continued to use supplement. Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

SUPPLEMENT USAGE FREQUENCY: AGE



KEY ITC INSIGHTS:

- Younger consumers were less consistent in their supplement use, but have a wider variety of supplements consumed
- 81% of consumers aged 46+ were more likely to be regular users (either daily or 4-6 times per week) vs. 18-35 (61%) and 36-45 (63%)

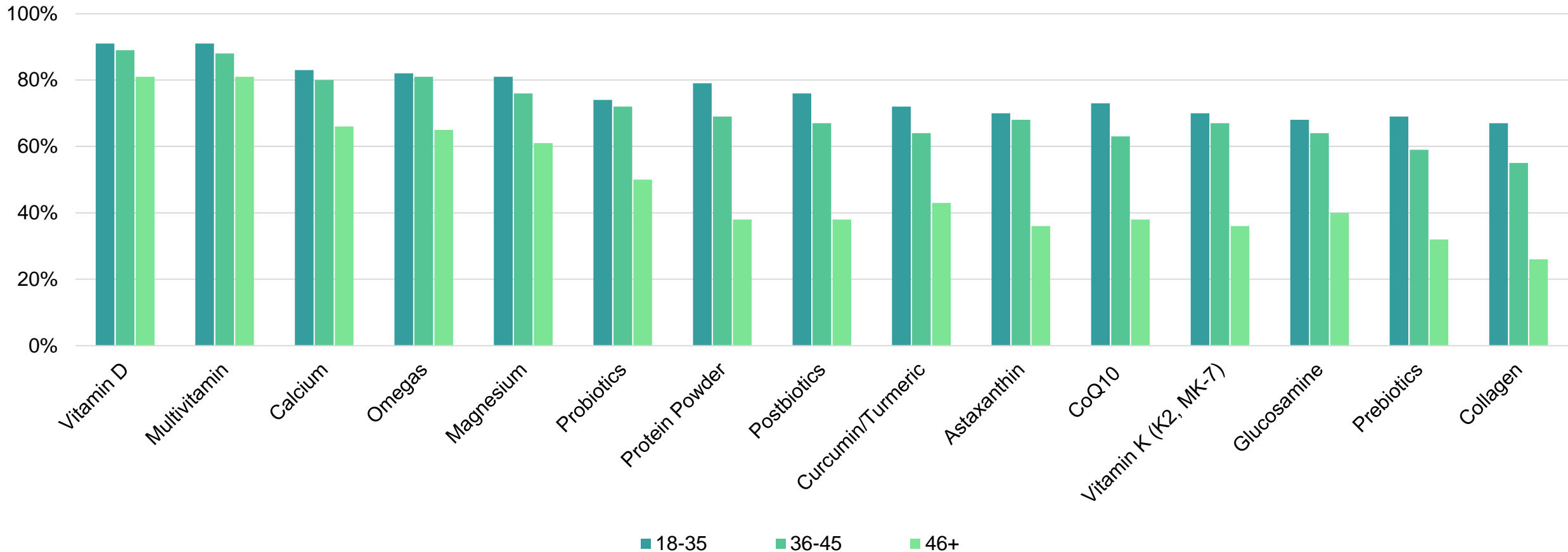


SUPPLEMENT USAGE LEVEL: AGE



KEY ITC INSIGHTS:

- Younger consumers in this survey take the most supplements, with the oldest demographic lagging significantly, especially in probiotics, postbiotics products, astaxanthin and CoQ10
- Both the 18-35 and 36-45 age groups are generally similar in usage pattern, differing most in protein, CoQ10 and collagen



Note: Answered only by those who have heard of the supplement, n=varies by supplement, % using the supplement. Question "Which of the following best describes how frequently you are taking the following supplements?"

FAMILIARITY WITH USE: AGE



KEY ITC INSIGHTS:

- Older consumers are comfortable with multivitamins, vitamin D and calcium
- Broad familiarity in Germany skews the magnesium results
- Younger consumer groups are very familiar with these ingredients, especially over indexing in prebiotics and collagen

- Vitamin D 72%
- Multivitamin 69%
- Calcium 64%
- Omegas 58%
- Protein Powder 55%
- Magnesium 55%
- Probiotics 51%
- Collagen 48%
- Prebiotics 46%

18-35

- Multivitamin 70%
- Vitamin D 70%
- Calcium 61%
- Omegas 60%
- Magnesium 53%
- Probiotics 52%
- Protein Powder 49%
- Curcumin/Turmeric 44%
- Prebiotics 42%

36-45

- Multivitamin 70%
- Vitamin D 68%
- Calcium 59%
- Omegas 54%
- Magnesium 45%
- Probiotics 36%
- Curcumin/Turmeric 30%
- Glucosamine 29%
- Protein Powder 27%

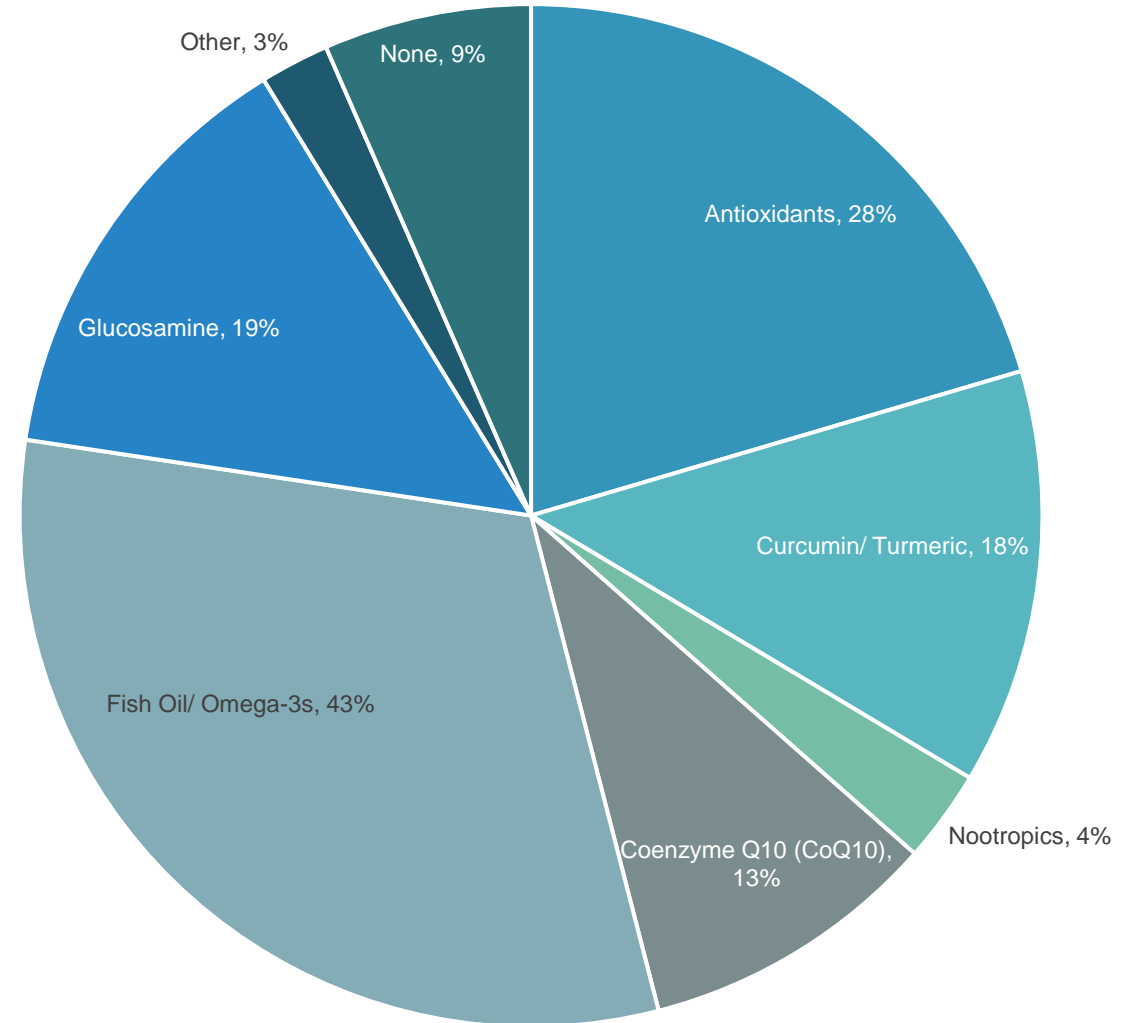
46+

SUPPLEMENT USE FOR HEALTHY AGING: 45+



KEY ITC INSIGHTS:

- When provided with a list of supplements for healthy aging, fish oil/omegas rose to the top



KEY TAKEAWAYS



- Most health issues that are current concerns are related in some way to healthy aging
- The health concerns are different in different countries
- Different ages have different priorities in the broader category
- This data shows that healthy aging is a major opportunity for supplement users

QUESTIONS

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