

**INGREDIENT
TRANSPARENCY
CENTER**

THE CHANGING CONSUMER IMMUNITY CONNECTION

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**INGREDIENT
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Immunity noun
im·mu·nity | \ i-'myü-nə-tē \

plural **immunities**

Definition of *immunity*
: the quality or state of being immune

especially: a condition of being able to resist a particular disease especially through preventing development of a pathogenic microorganism or by counteracting the effects of its products

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ITC INSIGHTS



ITC Insight reports offer trusted data analysis and insights to enable more informed decision-making in these categories and across the health ingredients universe.

TTC has been tracking several emerging ingredient categories for usage, reasons why they buy and attributes such as trust, sustainability, and transparency among consumers to identify new opportunities in the market.



- Report Categories**
- Supplement Users
 - Dietitians
 - Functional Food & Beverage Consumers
 - Health Care Professionals (new in 2022)
 - Pets (new in 2022)

Trusttransparency.com/insights

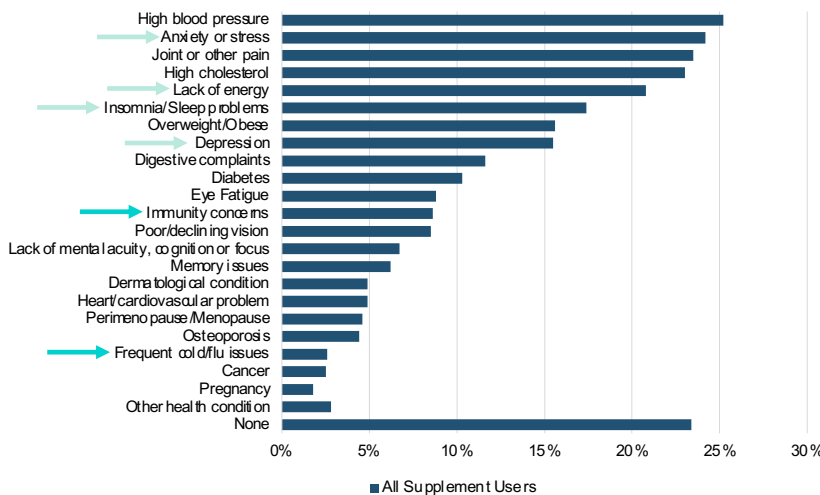
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WHAT HEALTH CONCERNS DO SUPPLEMENT USERS HAVE?



KEY ITC INSIGHT:

The pandemic's impact on mental health is evident, but immunity continues to impact many supplement consumers even if not a major concern, then an ancillary one and related to several major health concerns



18-35

- Anxiety/stress 39%
- Lack of energy 32%
- Depression 28%

36-45

- Anxiety/stress 39%
- Lack of energy 32%
- Depression 28%

46+

- High blood pressure 32%
- High cholesterol 30%
- Joint/other pain 28%

Note: All users 18-35 n=195, 36-45 n=215, 46+ n=590. Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

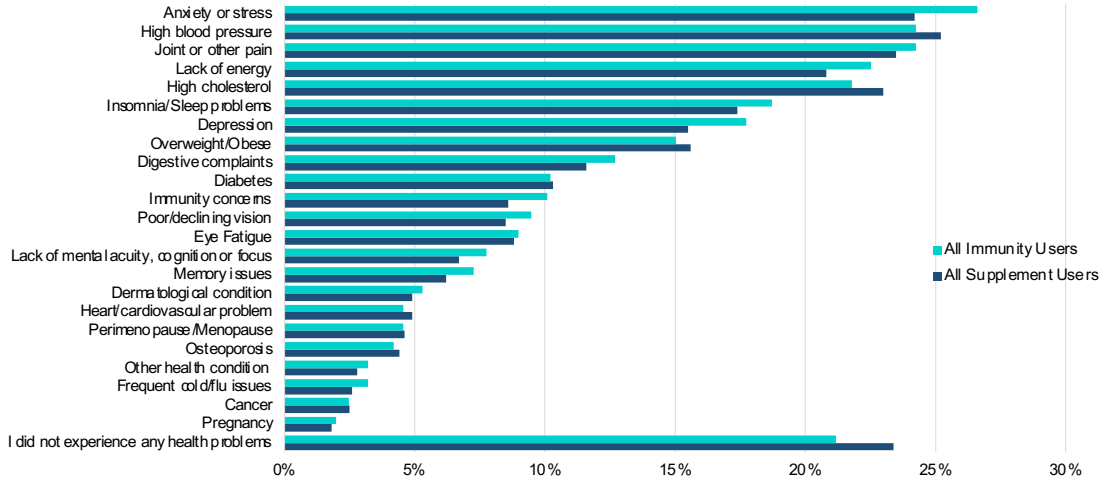
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WHAT ARE IMMUNE HEALTH USERS' HEALTH CONCERNS



KEY ITC INSIGHT:

- Immune health users over-index in health issues like anxiety or stress compared to all supplement users (especially comparing 27% for immune supplement users vs. 14% for non-users) or lack of energy (23% for immune supplement users vs. 13% for non-users) further supporting this cross-connection



Note: Immune health users n=812, all supplement users n=1000. Question "Which of the following health conditions impact you currently or have impacted you within the past year?"

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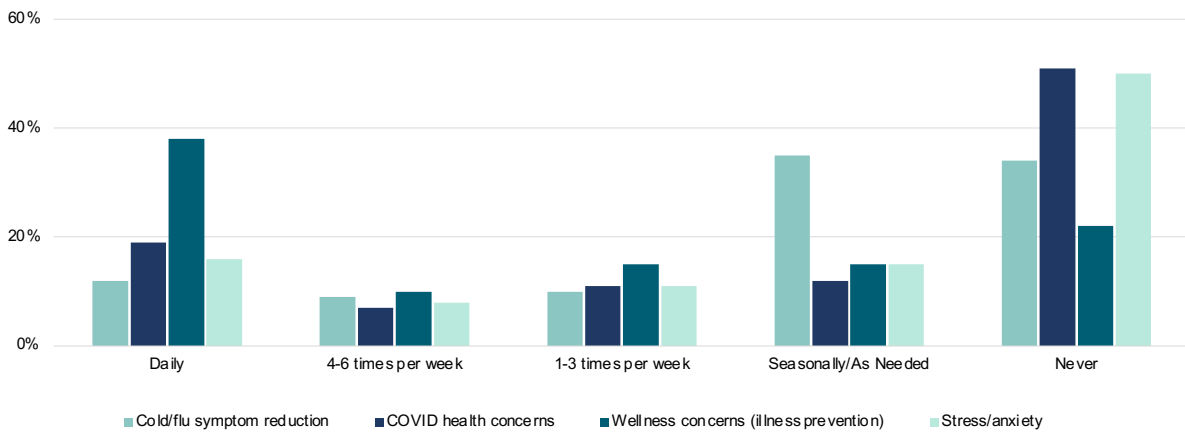
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IMMUNE HEALTH SUPPLEMENT USAGE AND BENEFITS



KEY ITC INSIGHTS:

- Many consumers have taken supplements that address immune health concerns, especially related to general illness prevention
- More than 80% of supplement users did take an immunity-connected supplement in the last year



Note: All users n=1000. Question: "How often did you take vitamins, minerals, herbs or other dietary supplements to address these specific health benefits or concerns in the last year?"

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6



53%

Of functional food and beverage consumers who said immunity was a concern sought to improve their condition by seeking specific active nutritional ingredients in the food that they purchase/consumed.

ITC Insights 2021 Functional Food & Beverage Survey

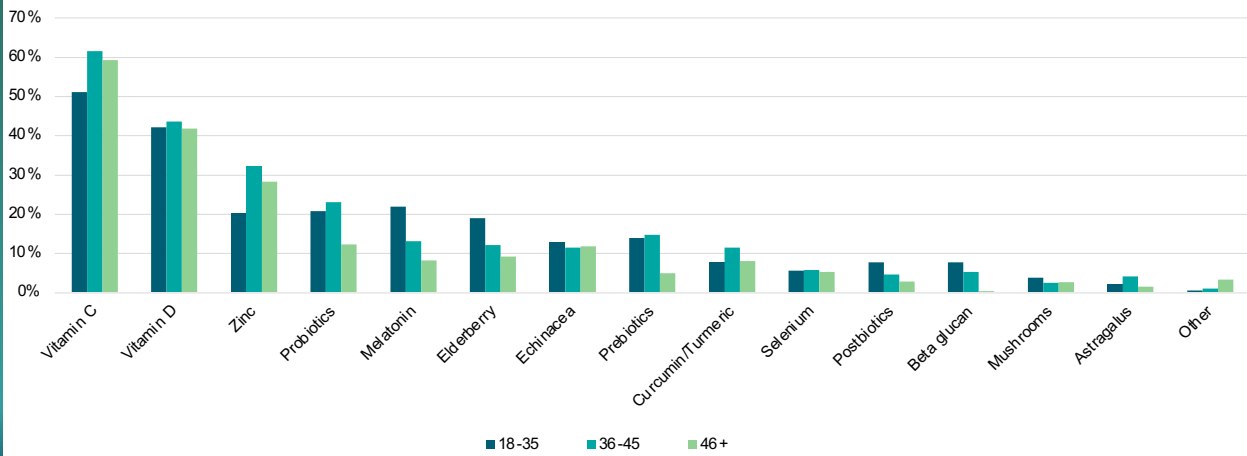
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IMMUNE HEALTH SUPPLEMENTS: AGE



KEY ITC INSIGHTS:

- For immune health related benefits, those aged 18-35 are most likely to be using “emerging” supplements like melatonin (22%) and elderberry (19%)
- Consumers aged 36-45 are most likely to rely on vitamin C (62%) and D (44%)



Note: 18-35 n=178, 36-45 n=190, 46+ n=444. Question: "Which of these supplement ingredients do you take for their immunity benefits?"

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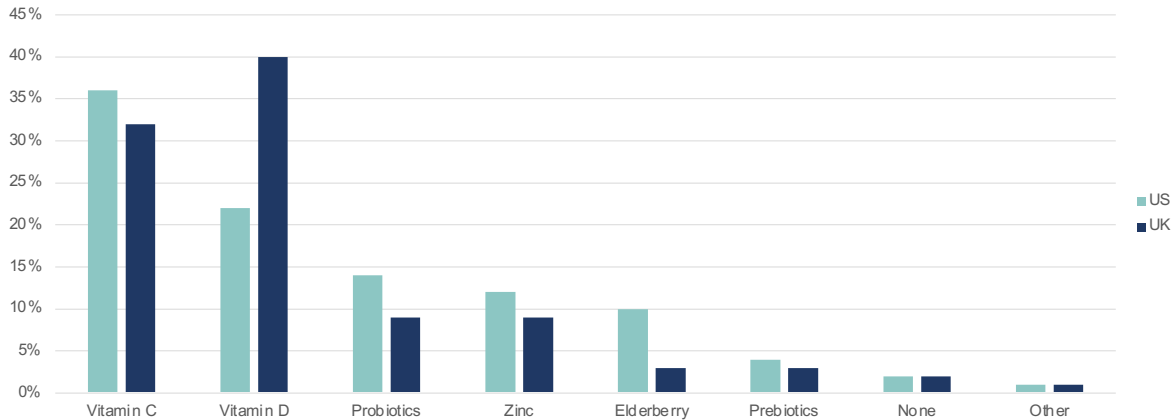
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WHAT IMMUNITY SUPPLEMENTS ARE CONSUMERS CHOOSING?



KEY ITC INSIGHTS:

- When asked about a single ingredient immunity supplement, US and UK consumers made different choices
- US consumers showed broader awareness



US n= 996 UK n = 506. "If you were to purchase an immunity supplement, which would you choose?"

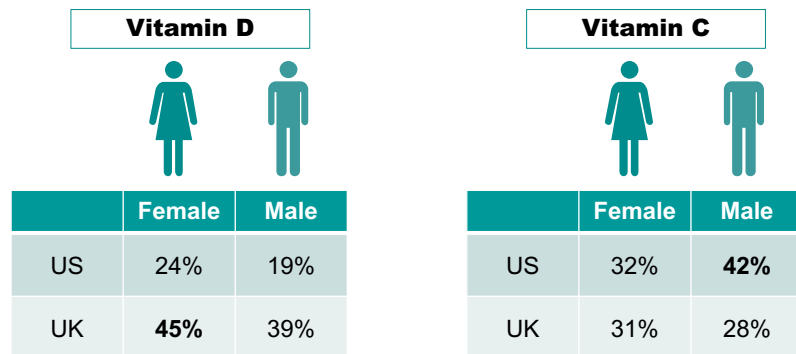
ITC Insights Snapshot: Preferred immunity-targeting ingredients. Jan. 2022

GENDER DIFFERENCES



KEY ITC INSIGHTS:

- Vitamin C was the top supplement in the US and use skewed male
- Vitamin D was the top choice in the UK and skewed female



If you were to purchase an immunity supplement, which would you choose? US n= 996 UK n = 506

ITC Insights Snapshot: Preferred immunity-targeting ingredients. Jan. 2022

KEY TAKEAWAYS



- The connection between overall wellness and immunity is increasing, leading this category to become more than seasonal
- Immunity consumers are seeking nutrition-based and supplement solutions
- There is an increasing inter-connection between immunity, anxiety and stress; the latter two are top concerns of the immunity supplement consumer
- Differentiation is definitely needed for males and females in this market as well as towards different age groups
- While vitamin D has seen an upsurge everywhere in an immunity context, the US lags behind the UK in the direct association between vitamin D, immunity and preventative wellness



QUESTIONS

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