



CONSUMER SUPPLEMENT USER AND MARKET INSIGHTS

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There's no question consumers are seeking mental health support



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The Mental Wellness Market is Growing Rapidly

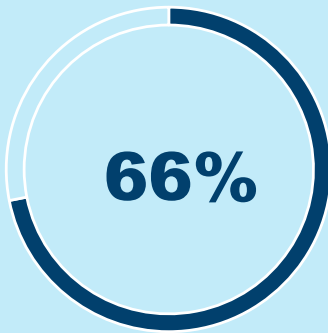
\$538B

Value the mental wellness market is expected to reach by 2030

6.35%

Estimated CAGR from 2022-2027 (Arizton)

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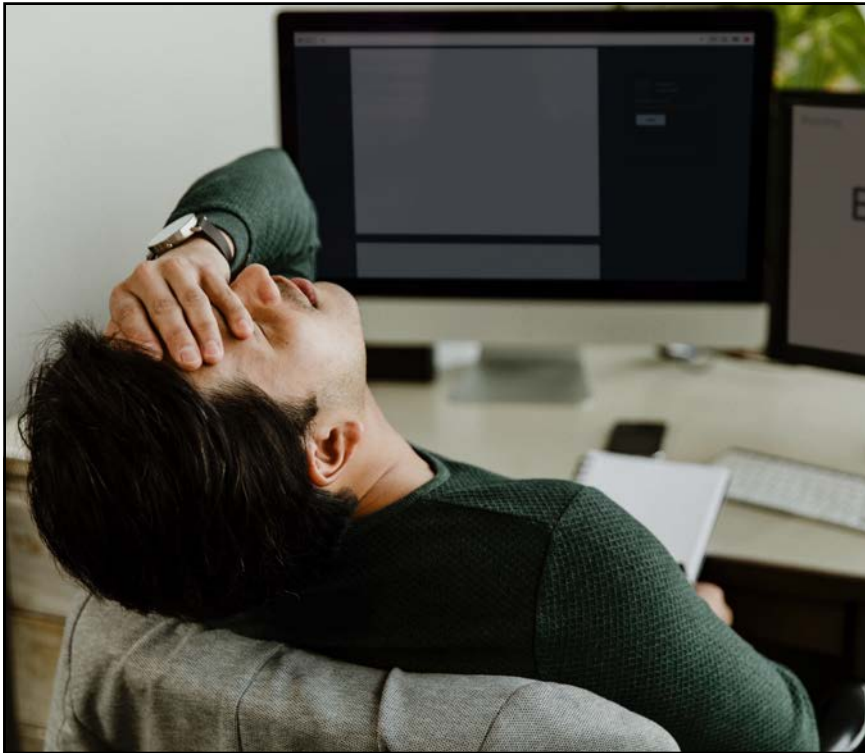


of consumers are interested in cognitive health products

of Americans aged 50+ regularly take brain health supplements (AARP)

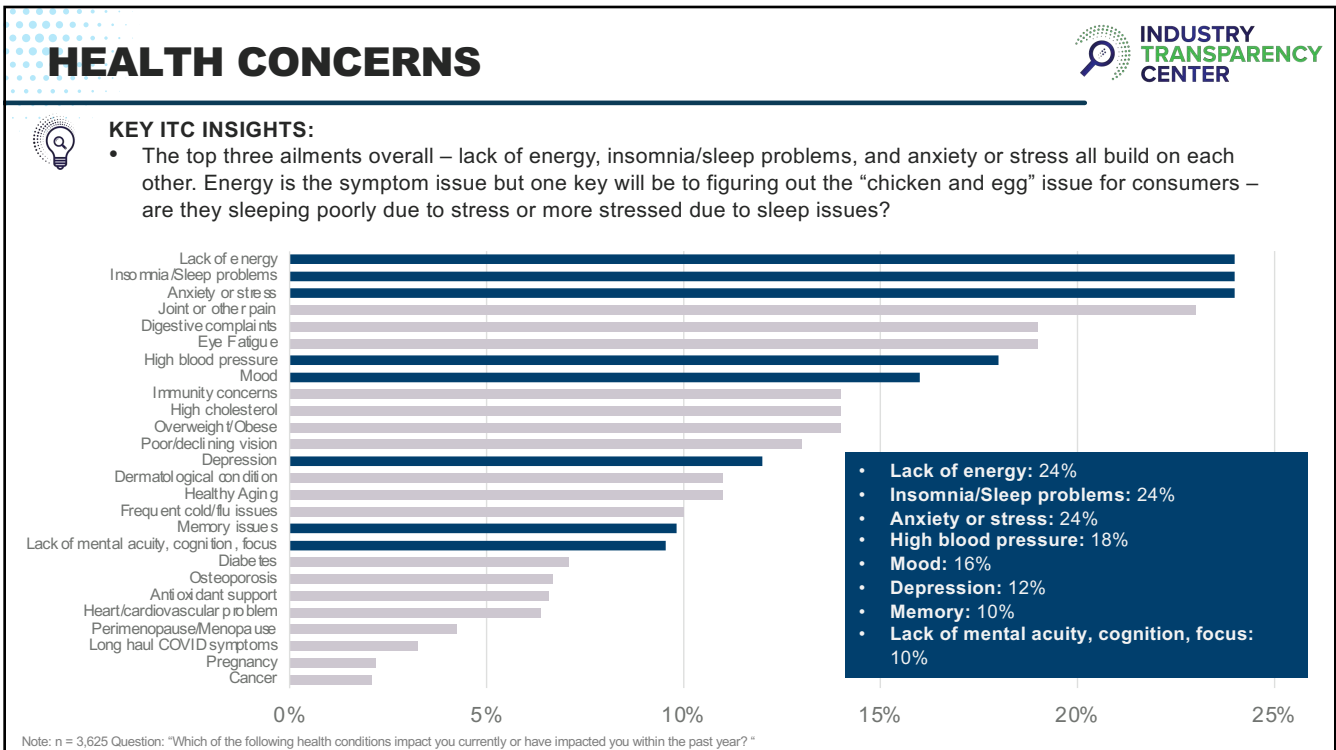


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Supplement consumer health concerns are increasingly tied to stress and mental wellness

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HEALTH CONCERNS: 2021-2022 COUNTRY



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%

2022 US TOP 5	
High blood pressure	26%
Anxiety/ stress	26%
Joint or other pain	24%
High cholesterol	22%
Lack of energy	22%

2022 UK TOP 5	
Anxiety/ stress	26%
Joint or other pain	23%
Lack of energy	23%
Insomnia/ Sleep problems	20%
Depression	18%

2022 Germany TOP 5	
Joint or other pain	26%
High blood pressure	23%
Insomnia/ Sleep problems	22%
Lack of energy	17%
Anxiety/ stress	14%

Note: Top ailments by country: US n=1,000, UK n=505, DE n=547

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HEALTH CONCERNS: 2022 COUNTRY



2022 Italy TOP 5	
Lack of energy	41%
Anxiety/ stress	38%
Insomnia/ Sleep problems	33%
Joint or other pain	30%
Mental acuity, cognition, or focus	27%

2022 China TOP 5	
Poor/ declining vision	35%
Insomnia/ sleep problems	28%
Immunity concerns	27%
Mental acuity, cognition, or focus	24%
Dermatological concerns	21%

Note: Top concerns by country: IT n=535, CN n=1,038

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HEALTH CONCERNS: TOP 5, 18-34



KEY ITC INSIGHT:

- The US and UK very closely mimic each other with all the top-5 issues tied to mental concerns whereas Germany is more varied but still has the top-3 around the stress-sleep-energy cyclical issue



2022 US TOP 5	
Anxiety/stress	37%
Depression	32%
Lack of Energy	28%
Mood	25%
Insomnia/Sleep Issues	19%

2022 UK TOP 5	
Anxiety/ stress	38%
Lack of Energy	32%
Depression	26%
Mood	19%
Insomnia/Sleep Issues	18%

2022 Germany TOP 5	
Lack of Energy	21%
Insomnia/Sleep Issues	20%
Anxiety/ Stress	18%
Joint of Other Pain	13%
Digestive Issues	12%

US n=275, UK n=136, Germany n=160, Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

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HEALTH CONCERNS: TOP 5, 35-54



KEY ITC INSIGHTS:

- While in the 18-34 bracket we saw depression as a common issue, only the US continues to see it persist as a significant self-reported issue in the 35-54 age bracket. With the coping defaults that depression tends to lead to cause, one has to wonder if the high blood pressure might be related
- We see joint and other pain quickly increase in this age bracket. This is the key time to get consumers trusting in your brand to relieve these issues and secure a VERY high LTV customer



2022 US TOP 5	
Anxiety/stress	36%
Lack of Energy	30%
Depression	26%
High Blood Pressure	25%
Insomnia/Sleep Issues	25%

2022 UK TOP 5	
Lack of Energy	32%
Anxiety/ Stress	30%
Joint or Other Pain	26%
Insomnia/Sleep Issues	25%
Mood	21%

2022 Germany TOP 5	
Insomnia/Sleep Issues	30%
Joint or Other Pain	28%
Lack of Energy	25%
Anxiety/ Stress	23%
High Blood Pressure	21%

US n=331, UK n=165, DE n=187 Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

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HEALTH CONCERNS: TOP 5, 55+



KEY ITC INSIGHT:

- While not showing up in the US, we still see the “triple threat” of anxiety/stress – insomnia – energy issue highly rated as a problem in the UK and the same for Germany. The truth is that no matter the age, solving or relieving this issue on multiple fronts is the real breakthrough global potential.
- The UK continues to have the lowest levels of concerns, most notably in this age group



2022 US TOP 5	
High Blood Pressure	39%
High Cholesterol	36%
Joint or Other Pain	33%
Healthy Aging	20%
Overweight	19%

2022 UK TOP 5	
Joint or Other Pain	32%
High cholesterol	25%
High Blood Pressure	22%
Insomnia/Sleep Problems	22%
Anxiety/ Stress	20%

2022 Germany TOP 5	
High Blood Pressure	39%
Joint or Other Pain	38%
High Cholesterol	23%
Insomnia/ Sleep Problems	21%
Overweight	21%

US n=394, UK n=204, DE n=200 *Which of the following health conditions impact you currently or have impacted you within the past year?*

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These supplement consumers are also increasingly taking supplements for mental health and stress reasons

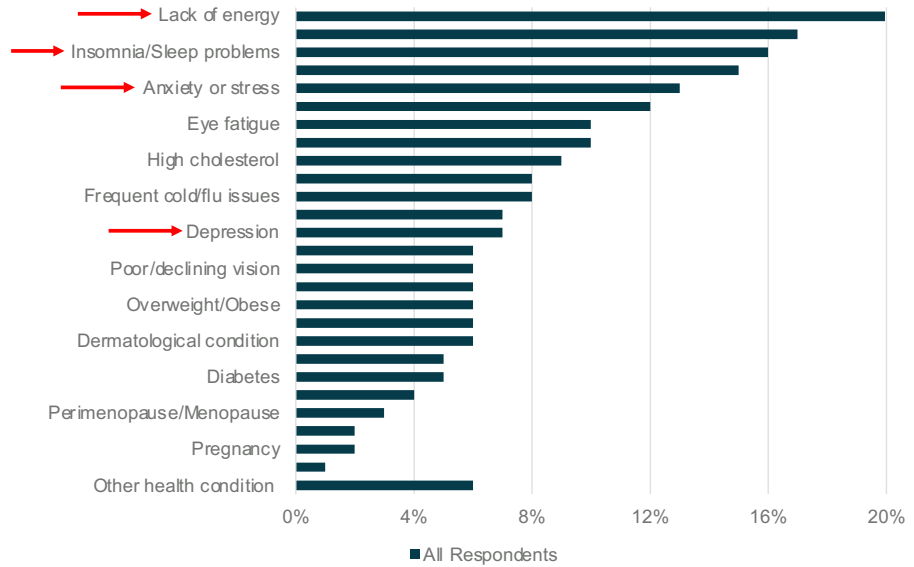
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HEALTH CONCERNS: WHAT THEY TOOK SUPPLEMENTS FOR



KEY ITC INSIGHTS:

- This matches, but trails those with these concerns across the board which means conversion of concern to purchase is a gap representing an opportunity
- At 20%, lack of energy was the top health concern for which consumers said they took supplements



n=3129. "Did you take supplements for any of the following reasons over the past year?"

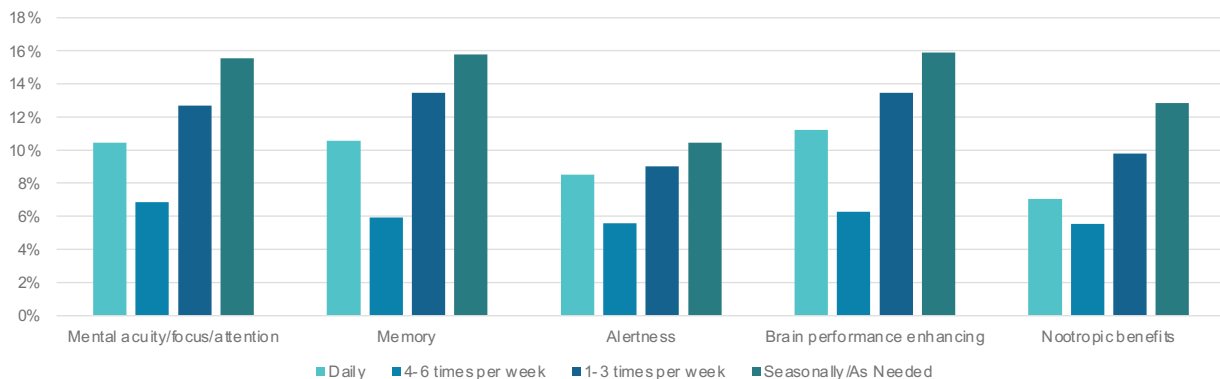
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CONSUMERS TAKING SUPPLEMENTS FOR BRAIN HEALTH CONCERNS



KEY ITC INSIGHTS:

- Mental acuity/focus/attention and brain performance enhancing top the list of reasons consumers are taking brain health supplements



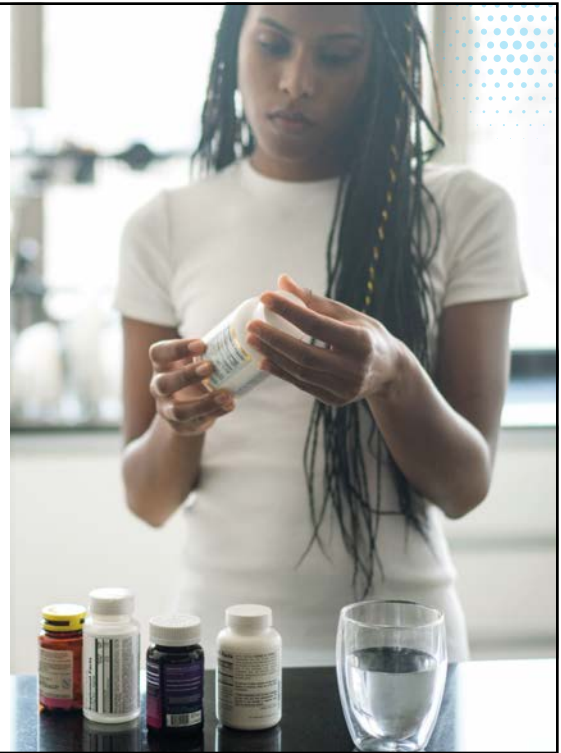
Note: n=1591. "How often did you take vitamins, minerals, herbs or other dietary supplements to address these specific health benefits or concerns in the last year?"

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KEY TAKEAWAYS

- Consumers are facing mental health issues now more than ever and those concerns are manifesting into other health areas
- Across all demographics, stress, anxiety and mental health-related conditions make the top of the list
- The top 3 health concerns consumers say they take supplements for are related to mental health offering market opportunity



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QUESTIONS



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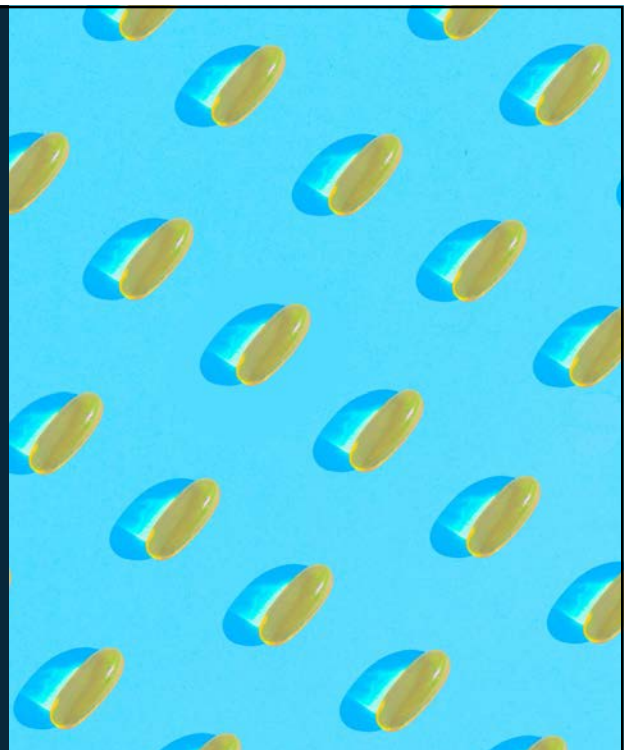


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