



ITC INSIGHTS 2024 CONSUMER SUPPLEMENT SURVEY

GENERAL REPORT

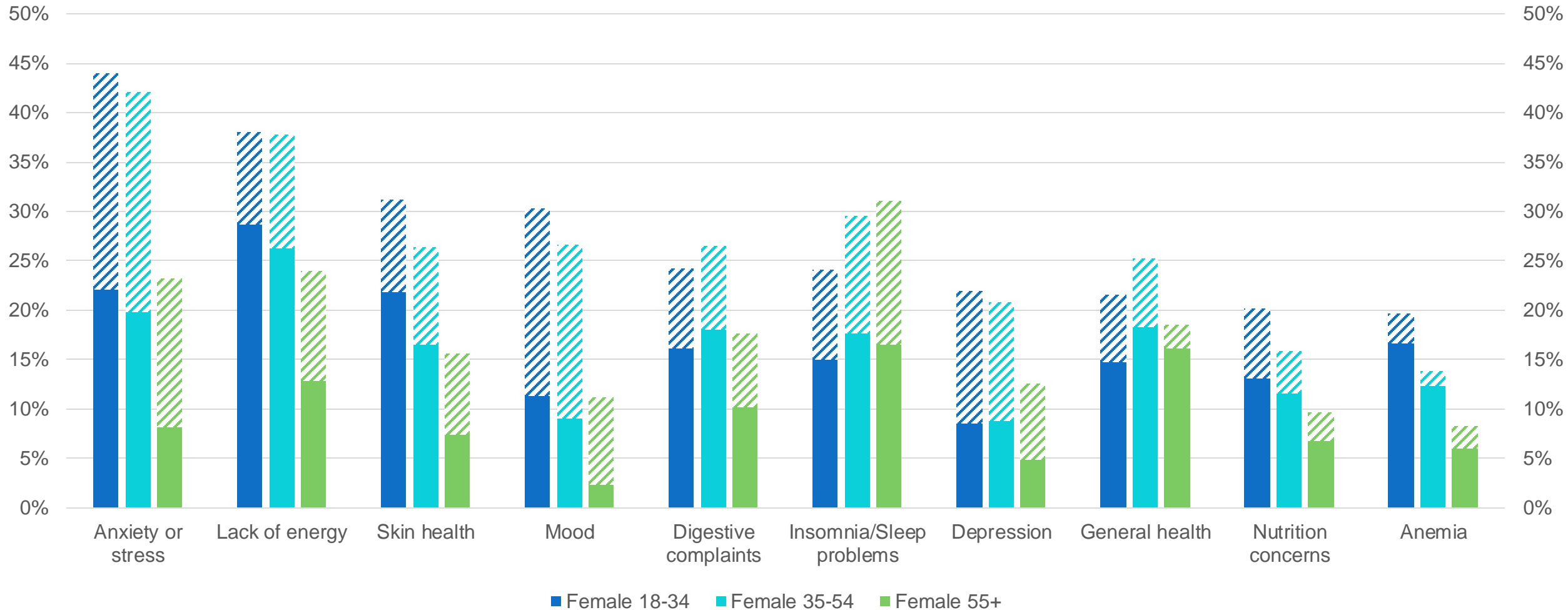
HEALTH CONCERNS AND WHAT THEY TAKE

SUPPLEMENTS FOR: AGE & GENDER



Key Insights:

- The mental health related concerns see the highest levels of reporting from the younger age groups, particularly females.
- Insomnia/sleep problems is one of the few concerns with the top response coming from females over 55.



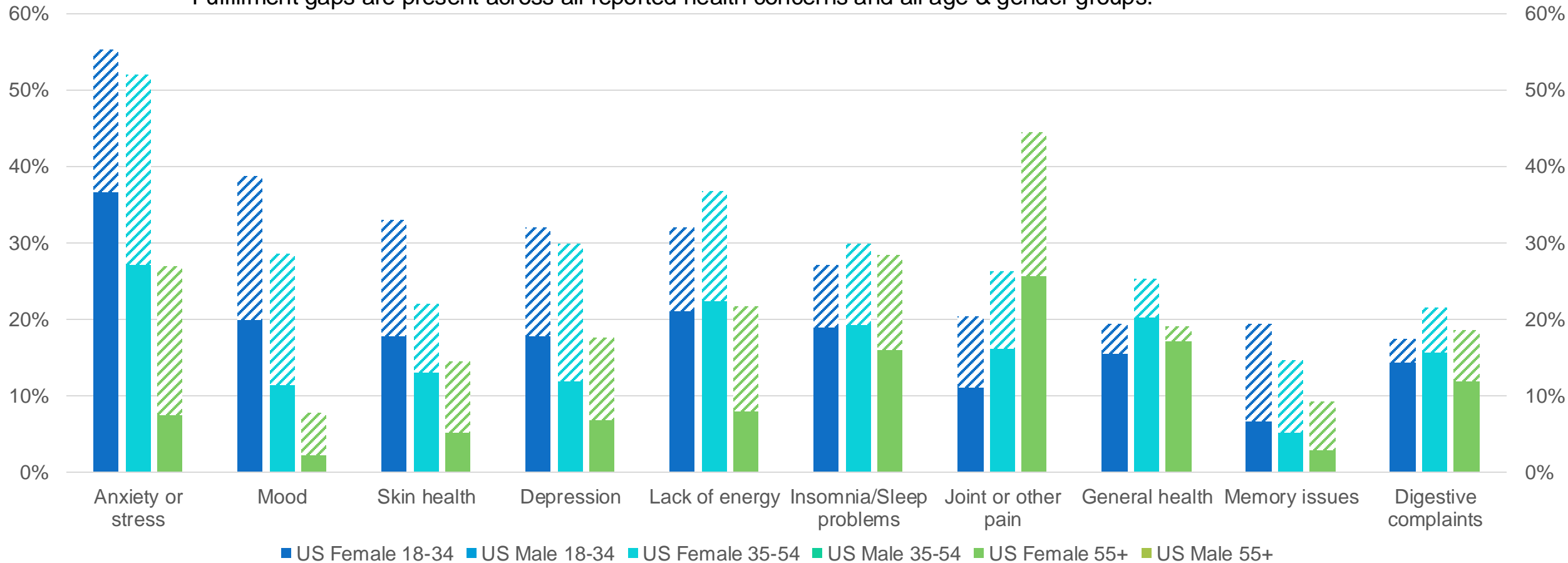
Note: Female 18-35 n=634, Male 18-35 n=565, Female 35-54 n=885, Male 35-54 n=877, Female 55+ n=572, Male 55+ n=658. Results shown for top 10 health concerns. Question: "Which of the following health conditions or concerns currently impact or impacted you within the past year?" Entire bar represents total reporting, solid bar represents using supplements for that concern and cross hatch bar represents fulfillment gap.

HEALTH CONCERNS AND WHAT THEY TAKE SUPPLEMENTS FOR: AGE & GENDER (US)



Key Insights:

- Mental health related concerns tend to have the largest responses, particularly from young females.
- Anxiety or stress has the two highest reporting rates of any health concern (55% from females 18-34 and 52% from females 35-54).
- Fulfillment gaps are present across all reported health concerns and all age & gender groups.



Note: US Female 18-35 n=103, US Male 18-35 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Results shown for top 10 health concerns. Question: "Which of the following health conditions or concerns currently impact or impacted you within the past year?" Entire bar represents total reporting, solid bar represents using supplements for that concern and cross hatch bar represents fulfillment gap.

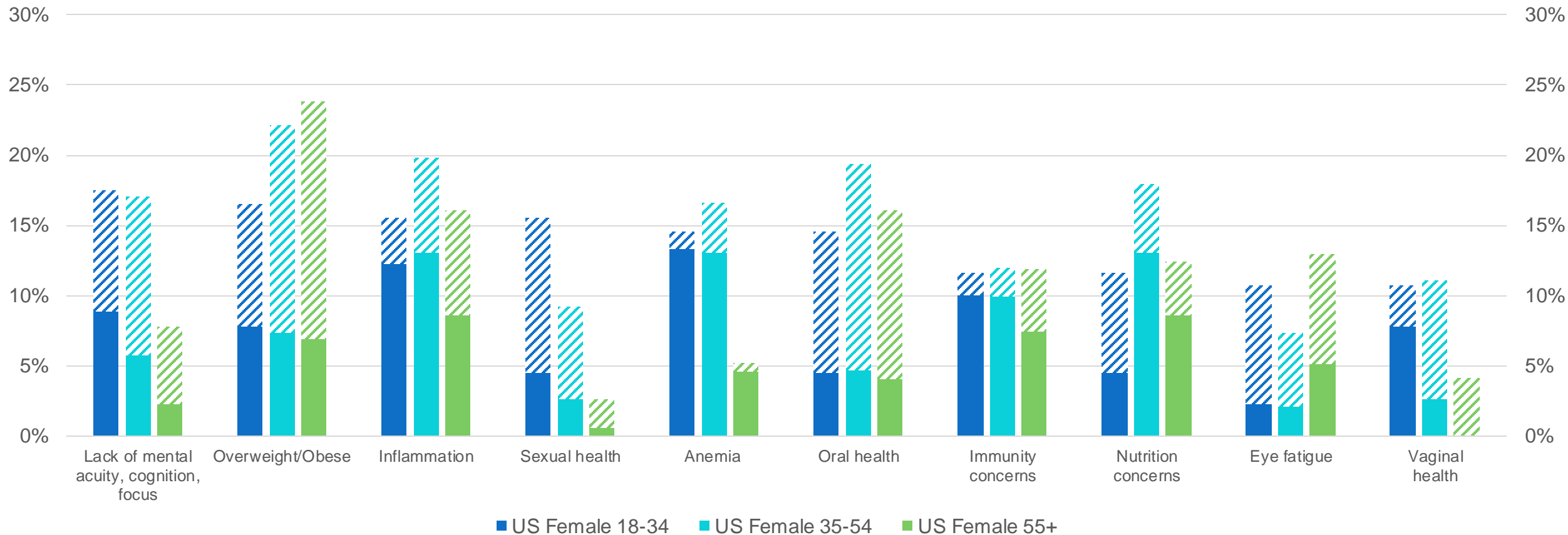
HEALTH CONCERNS AND WHAT THEY TAKE

SUPPLEMENTS FOR: AGE & GENDER (US) – NEXT 10



Key Insights:

- Overweight/obesity is heavily skewed older and female and has some of the largest fulfillment gaps.
- Anemia reporting is highest among females under 55 but has relatively small fulfillment gaps.
- Oral health is another concern that has large fulfillment gaps across each age & gender group



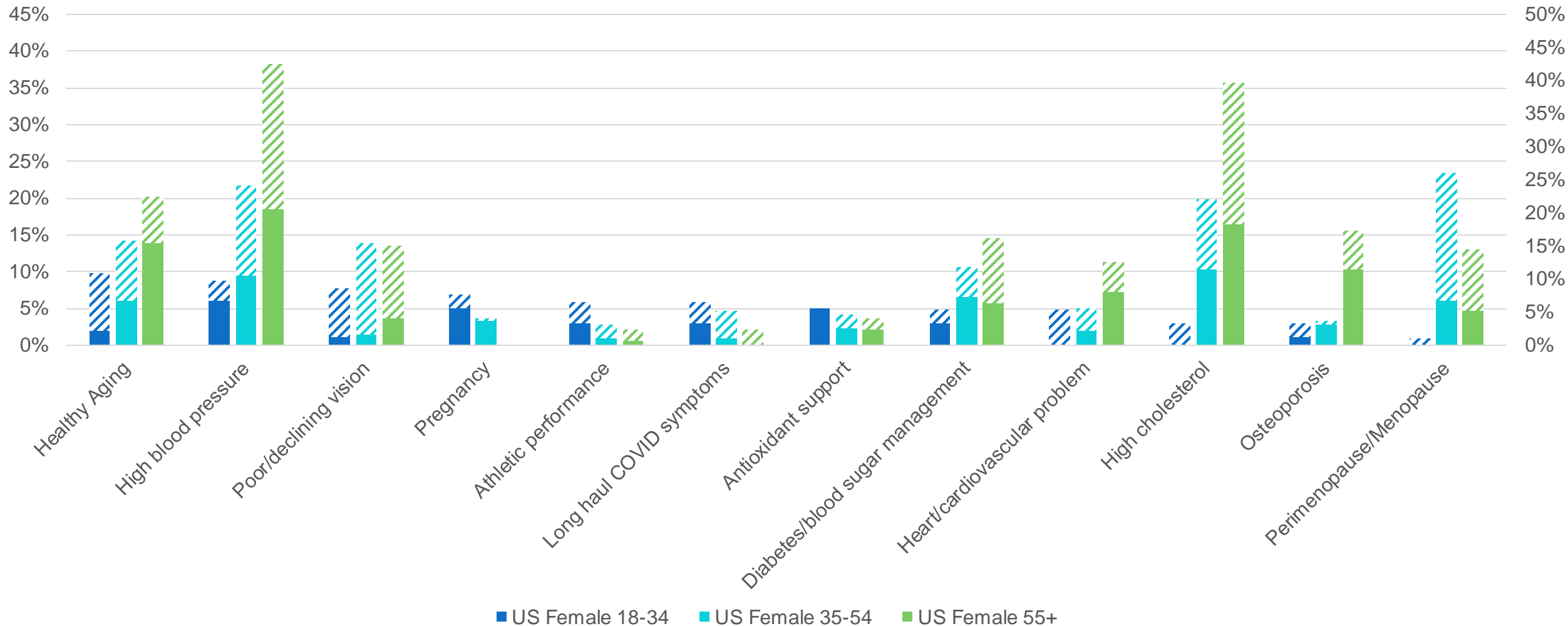
Note: US Female 18-35 n=103, US Male 18-35 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Results shown for top 11-20 health concerns. Question: "Which of the following health conditions or concerns currently impact or impacted you within the past year?" Entire bar represents total reporting, solid bar represents using supplements for that concern and cross hatch bar represents fulfillment gap.

HEALTH CONCERNS AND WHAT THEY TAKE SUPPLEMENTS FOR: AGE & GENDER (US) – LAST 10



Key Insight:

- Both high blood pressure and cholesterol are significantly skewed older and still see relatively large fulfillment gaps.



Note: US Female 18-35 n=103, US Male 18-35 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Results shown for top 21-32 health concerns. Question: "Which of the following health conditions or concerns currently impact or impacted you within the past year?" Entire bar represents total reporting, solid bar represents using supplements for that concern and cross hatch bar represents fulfillment gap.

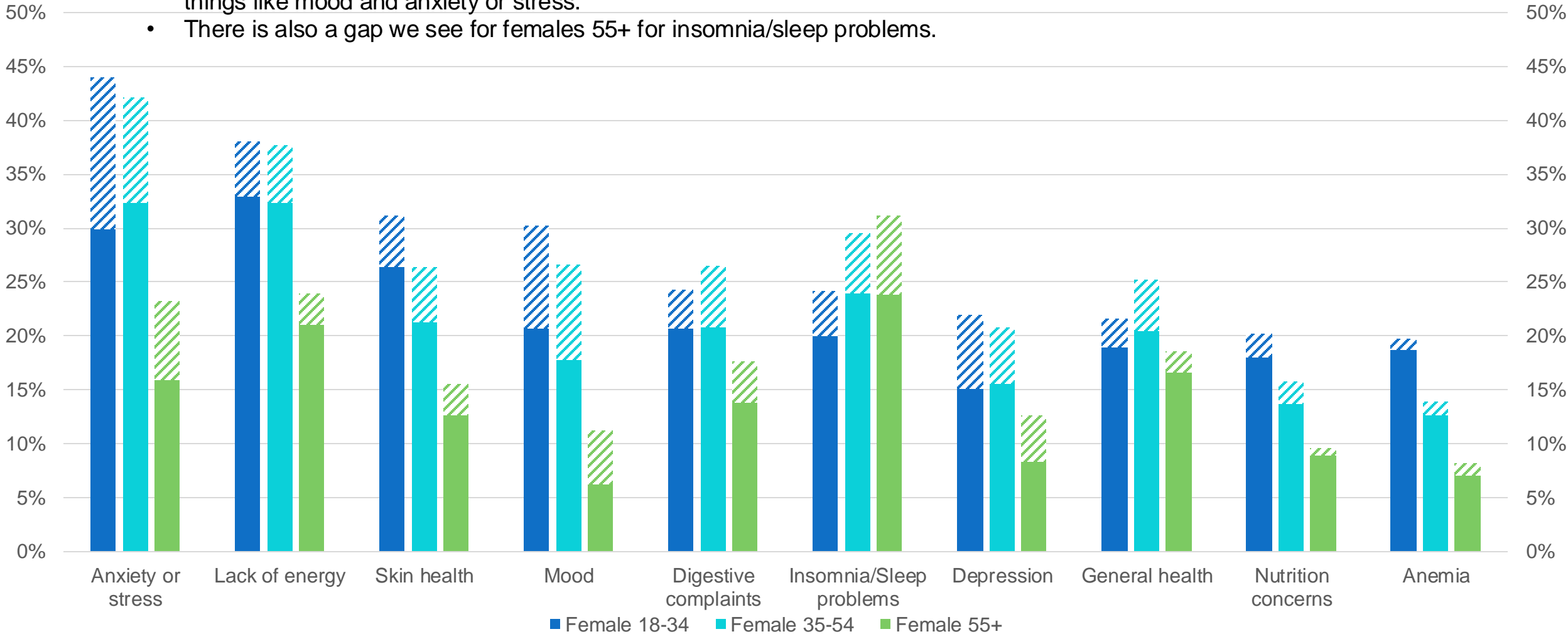


WILLING TO TAKE SUPPLEMENTS TO ADDRESS CONCERNS: AGE & GENDER – TOP10



Key Insight:

- Young females especially have some of the largest gaps between reporting and a willingness to take a supplement for things like mood and anxiety or stress.
- There is also a gap we see for females 55+ for insomnia/sleep problems.



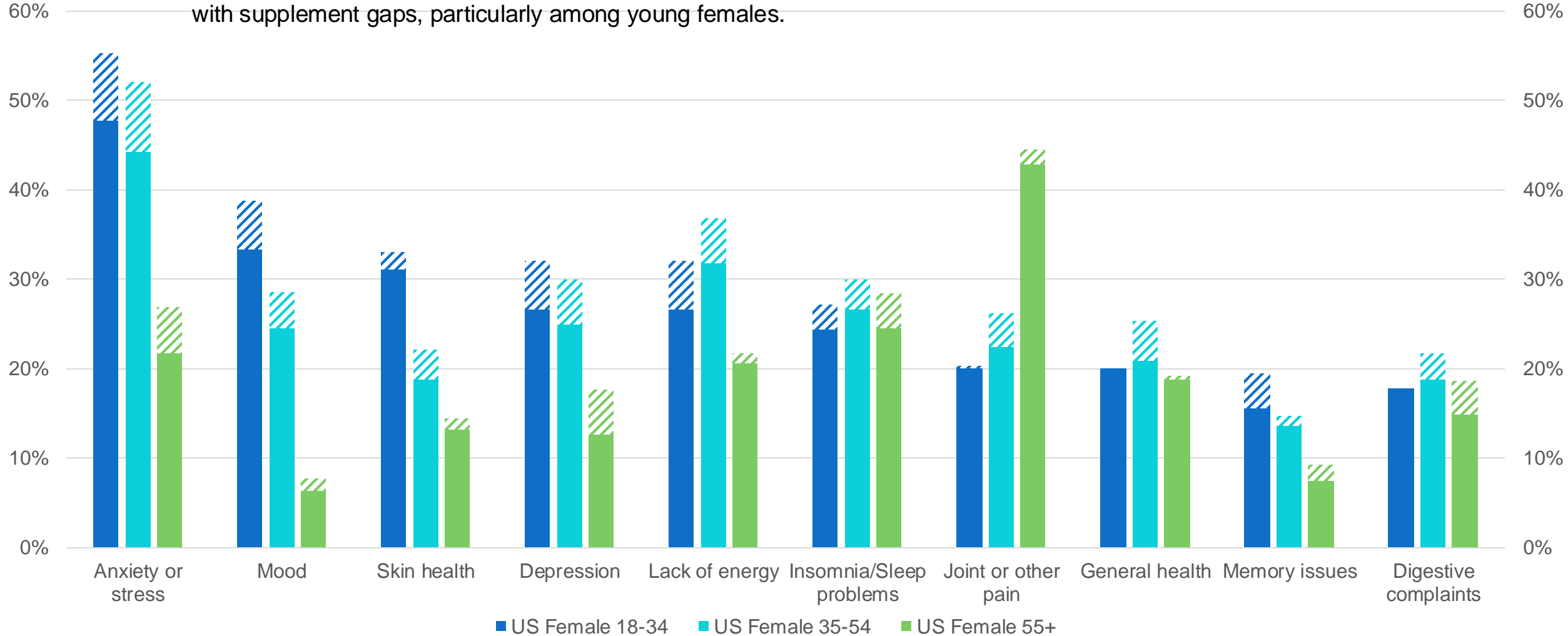
Note: Female 18-34 n=634, Male 18-34 n=565, Female 35-54 n=885, Male 35-54 n=877, Female 55+ n=572, Male 55+ n=658. Question: "Would you consider supplements for any of the following health concerns?" Results shown for top 10 health concerns. Question: "Which of the following health conditions or concerns currently impact or impacted you within the past year?" Entire bar represents total reporting, solid bar represents a willingness to use supplements for that concern, smaller hatch indicates willingness to fulfill.

WILLING TO TAKE SUPPLEMENTS TO ADDRESS CONCERNS: US, AGE & GENDER



Key Insight:

- Overall the gaps between reporting a concern and a willingness to take a supplement is smaller than the manage currently with supplement gaps, particularly among young females.



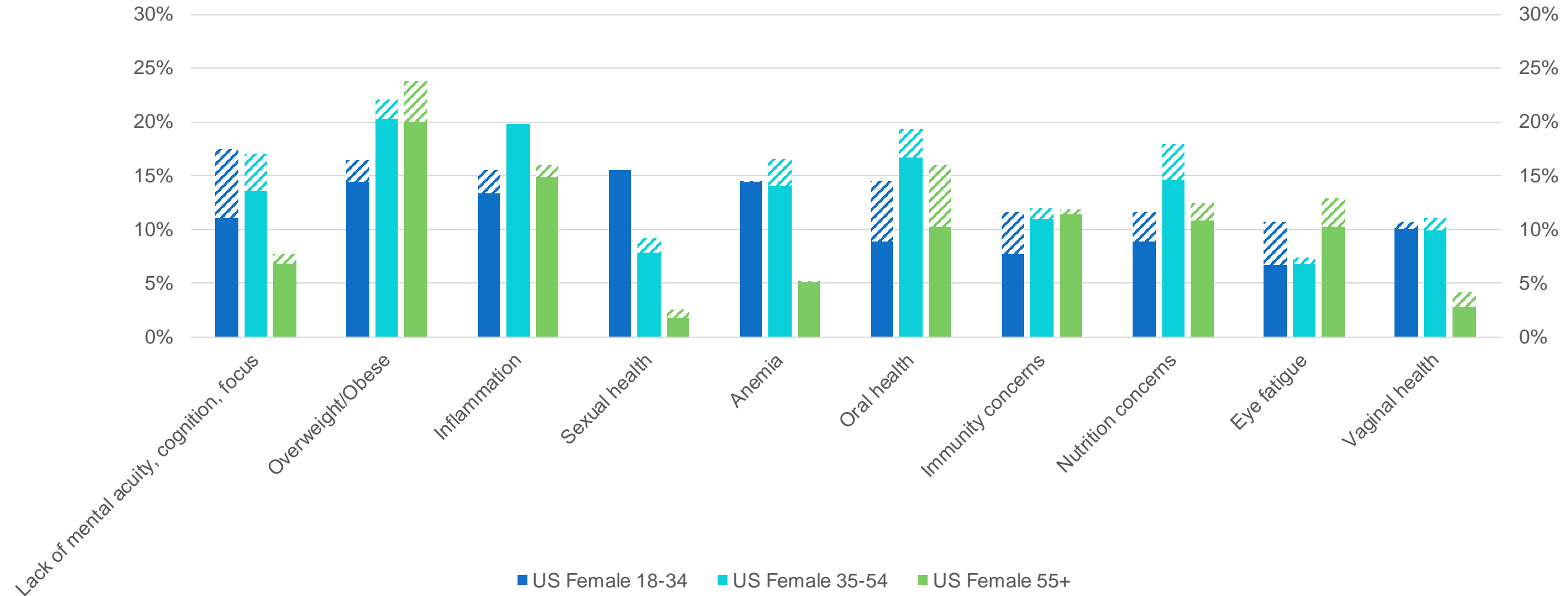
Note: US Female 18-35 n=103, US Male 18-35 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: **"Would you consider supplements for any of the following health concerns?"** Results shown for top 10 health concerns. Question: "Which of the following health conditions or concerns currently impact or impacted you within the past year?" Entire bar represents total reporting, solid bar represents a willingness to use supplements for that concern, smaller hatch indicates willingness to fulfill.

WILLING TO TAKE SUPPLEMENTS TO ADDRESS CONCERNS: US, AGE & GENDER – NEXT 10



Key Insight:

- We have some gaps of zero or near zero here, including nutrition concerns for females 35-54 for inflammation so the takeaway is that for these, almost all with the concern have a willingness to consider supplements.



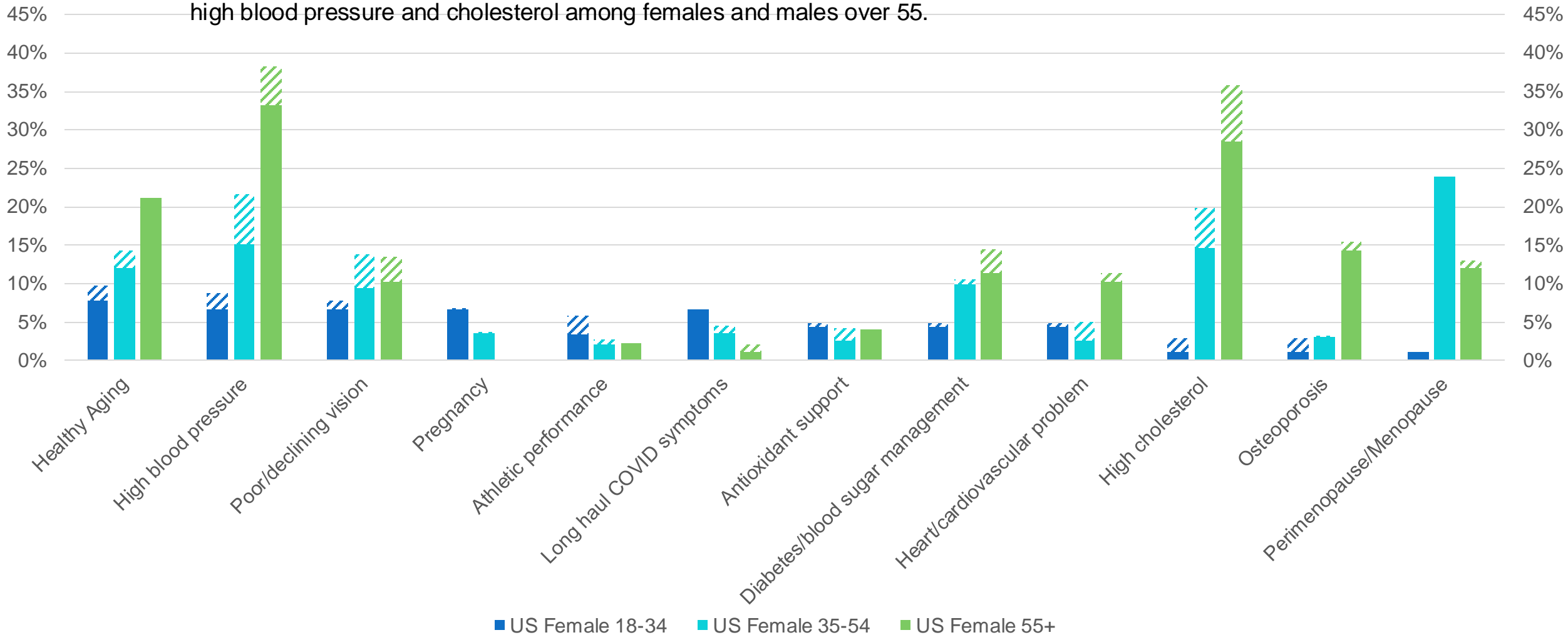
Note: US Female 18-35 n=103, US Male 18-35 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: “**Would you consider supplements for any of the following health concerns?**” Results shown for top 11-20 health concerns. Question: “Which of the following health conditions or concerns currently impact or impacted you within the past year?” Entire bar represents total reporting, solid bar represents a willingness to use supplements for that concern, smaller hatch indicates willingness to fulfill.

WILLING TO TAKE SUPPLEMENTS TO ADDRESS CONCERNS: US, AGE & GENDER – LAST 10



Key Insight:

- We see some of the smallest gaps for the health concerns with the lowest reporting rates, but also relatively large gaps for high blood pressure and cholesterol among females and males over 55.



Note: US Female 18-35 n=103, US Male 18-35 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: “**Would you consider supplements for any of the following health concerns?**” Results shown for top 21-32 health concerns. Question: “Which of the following health conditions or concerns currently impact or impacted you within the past year?” Entire bar represents total reporting, solid bar represents a willingness to use supplements for that concern, smaller hatch indicates willingness to fulfill.

HEALTH CONCERNS: US AGE & GENDER, SUPPLEMENT USAGE AND WILLINGNESS TO USE



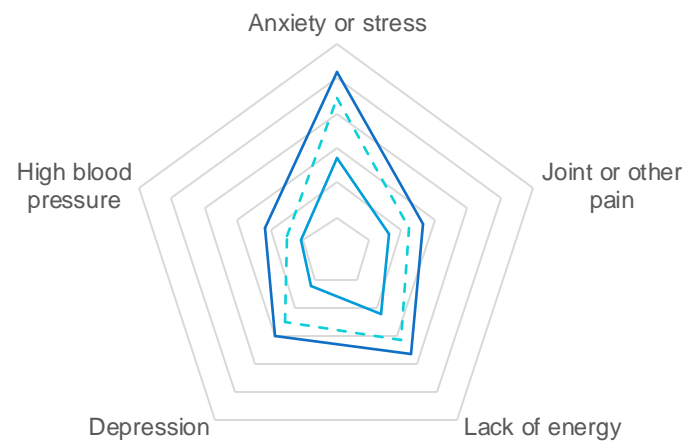
Key Insight:

- Mental health related concerns are heavily driven by younger females, with their response rates for anxiety or stress (the overall number one US health concern) nearly double that of those over 55.

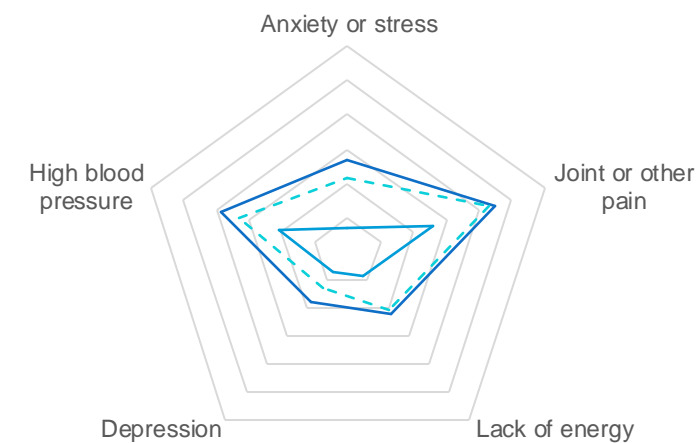
US Female 18-34



US Female 35-54



US Female 55+



— Those With a Concern — Those Taking Supplements to Address - - - Those Willing to Take Supplements

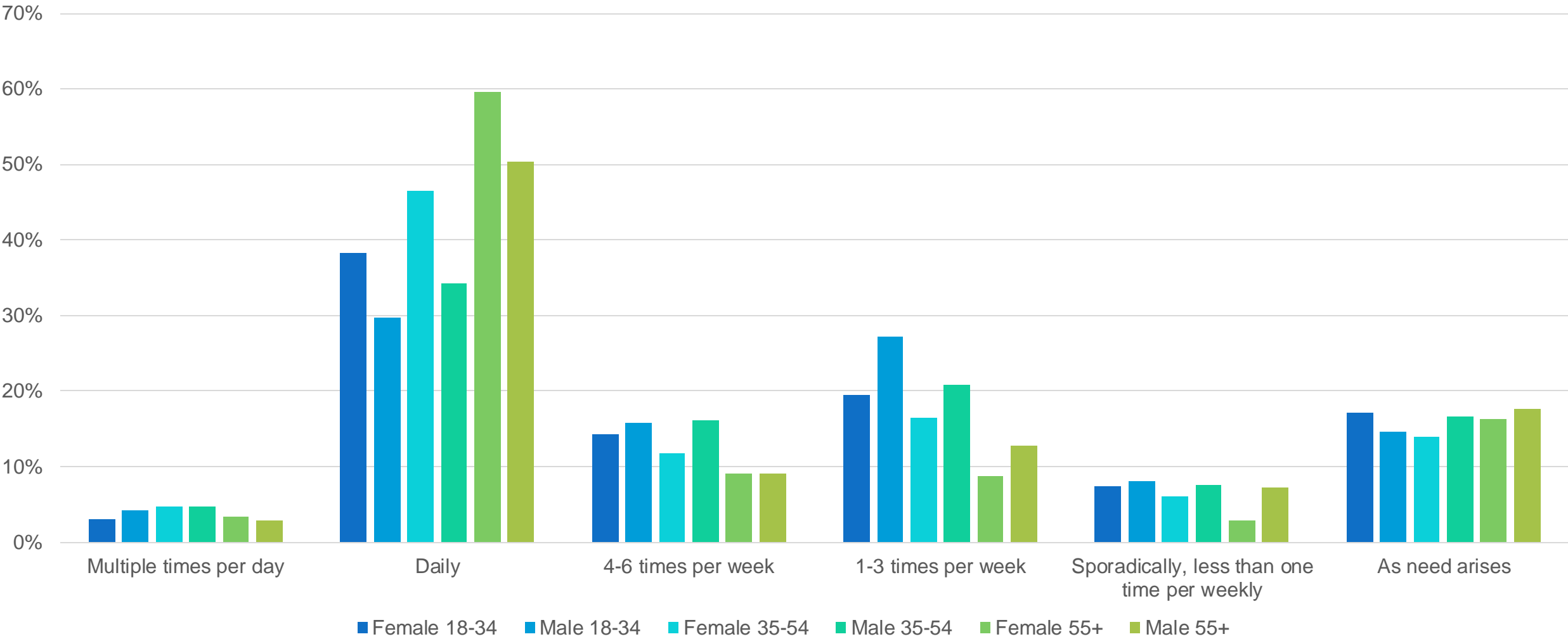
Note: US Female 18-34 n=103, US Male 18-34 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134.
Question: "Would you consider supplements for any of the following health concerns?" Top 5 US health concerns based on reporting rate.

SUPPLEMENT USAGE FREQUENCY: AGE & GENDER



Key Insights:

- Daily has as noticeable female and older skew.



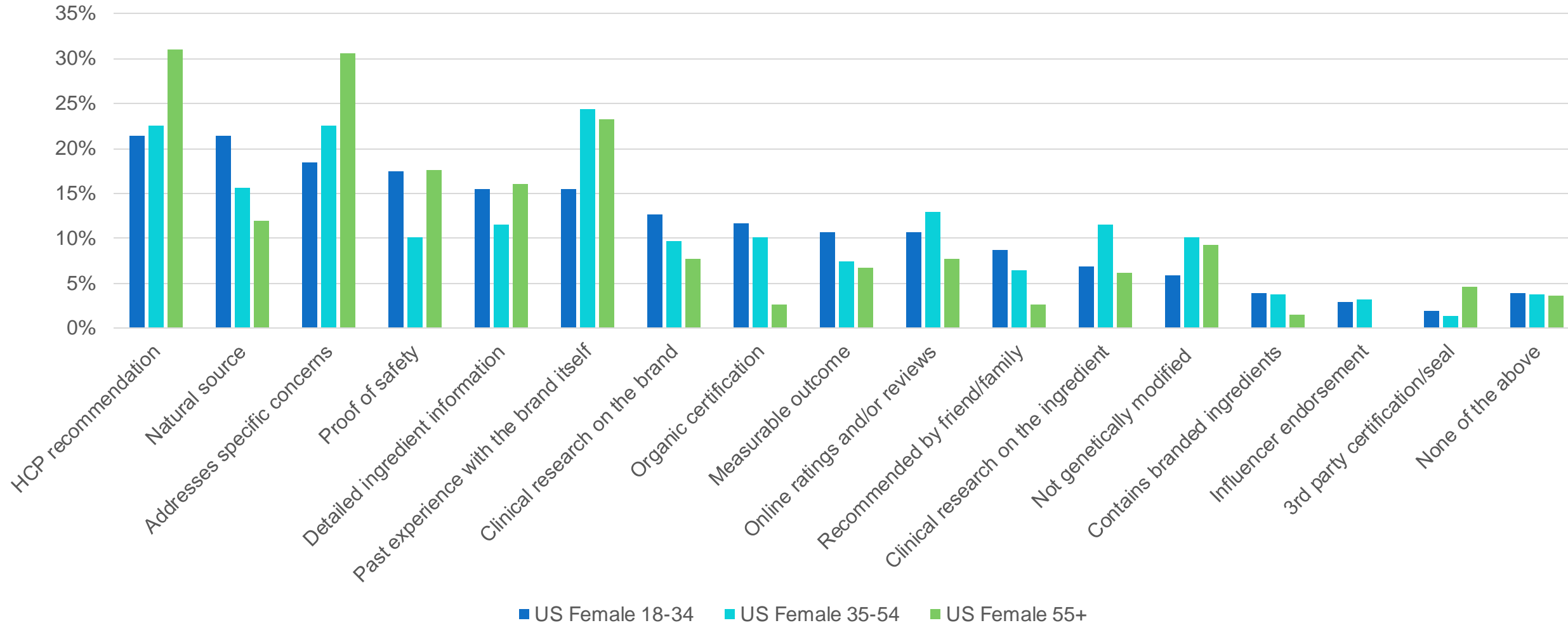
Note: Female 18-34 n=634, Male 18-34 n=565, Female 35-54 n=885, Male 35-54 n=877, Female 55+ n=572, Male 55+ n=658. Question: "How often do you take vitamins, minerals, herbs or other dietary supplements (e.g. fish oil, protein powder, probiotics, melatonin, etc.)?"

ATTRIBUTES INFLUENCING PURCHASE: US, AGE & GENDER



Key Insight:

- A recommendation from a health care professional, addressing a specific concern and past experience with the brand all skew older in the US with noticeably higher response rates from those over 55.



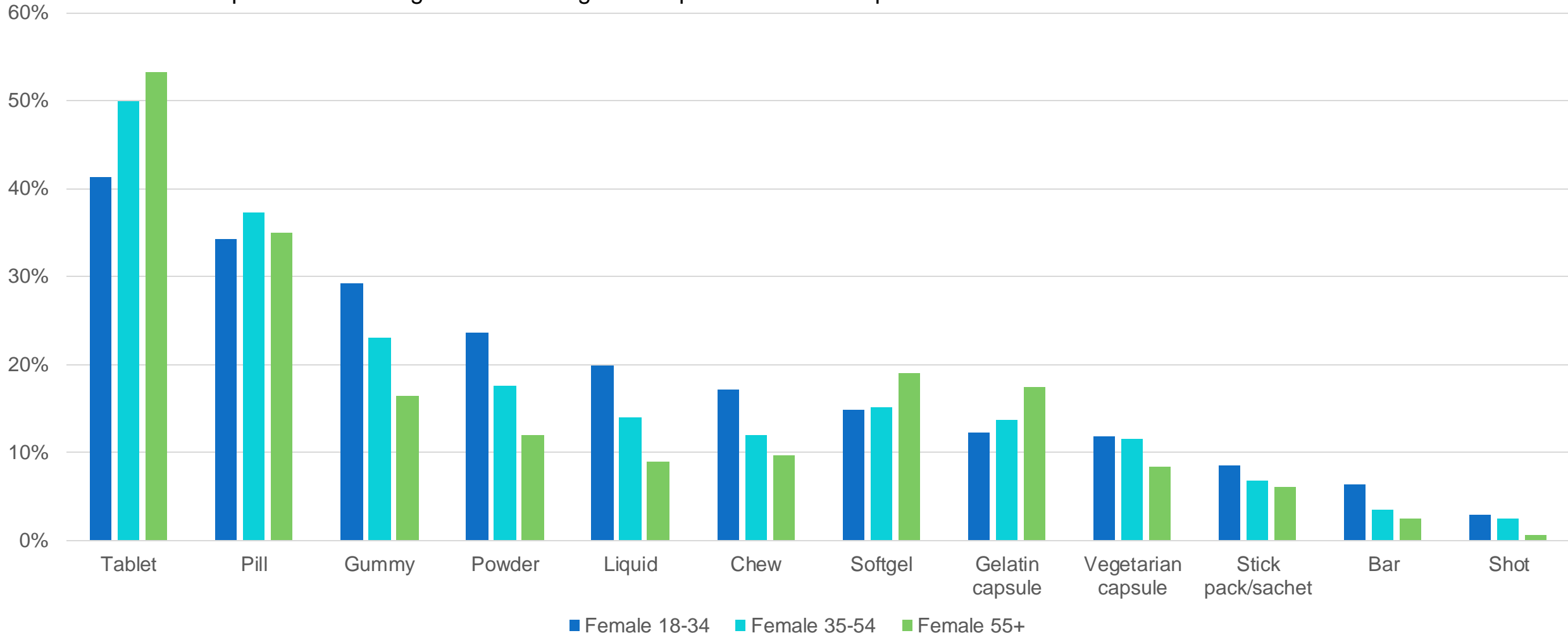
Note: US Female 18-34 n=103, US Male 18-34 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: "What are the most important attributes you look for when purchasing supplements?"

PREFERRED FORMAT: AGE & GENDER

Key Insights:



- Both tablet and pill skew older.
- Gummy, powder, liquid and chew are skewed younger, with powder, liquid and chew driven by males.
- The preference for vegetarian versus gelatin capsules is almost equal for females 18-34.



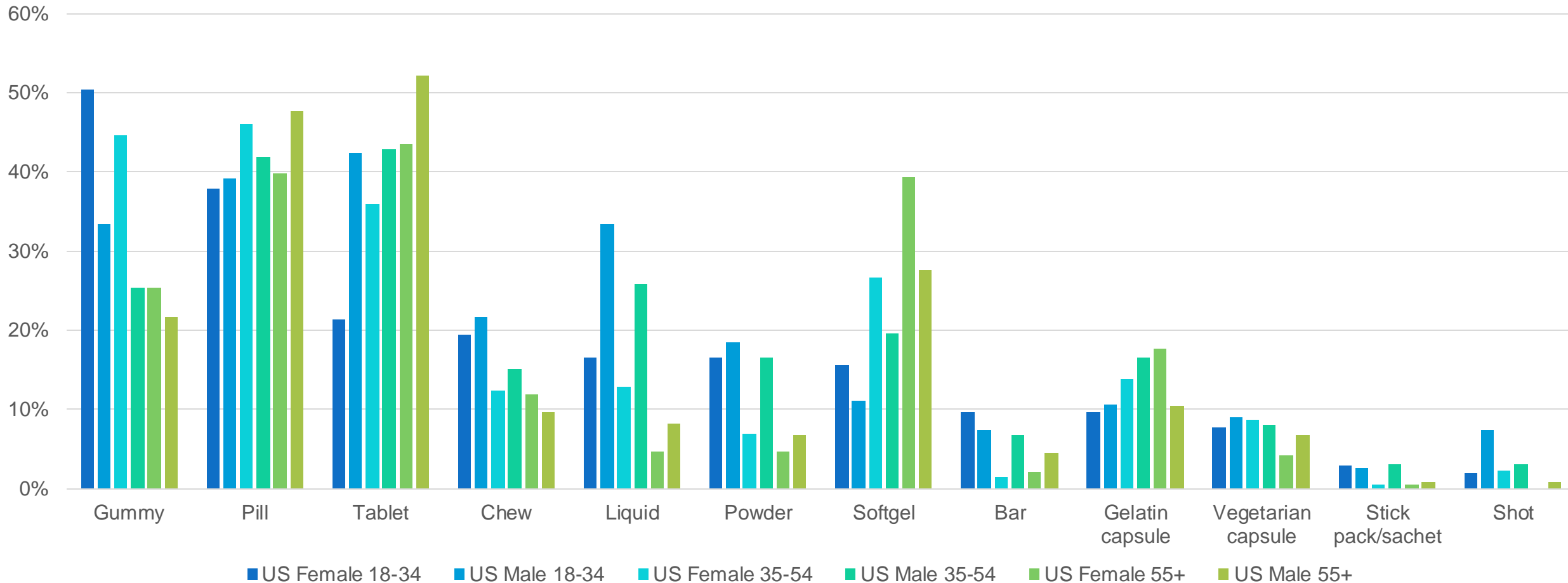
Note: Female 18-34 n=634, Male 18-34 n=565, Female 35-54 n=885, Male 35-54 n=877, Female 55+ n=572, Male 55+ n=658. Question: "In which format do you prefer your supplements?"

PREFERRED FORMAT: US, AGE & GENDER



Key Insights:

- Pill and tablet are less skewed older in the US.
- Gummy is heavily driven by females 18-34 followed by females 35-54, the former who mark it as their number one format.
- Liquid is very popular among males 18-34.
- Softgel as a format is skewed older and female; gelatin capsules skews slightly older.



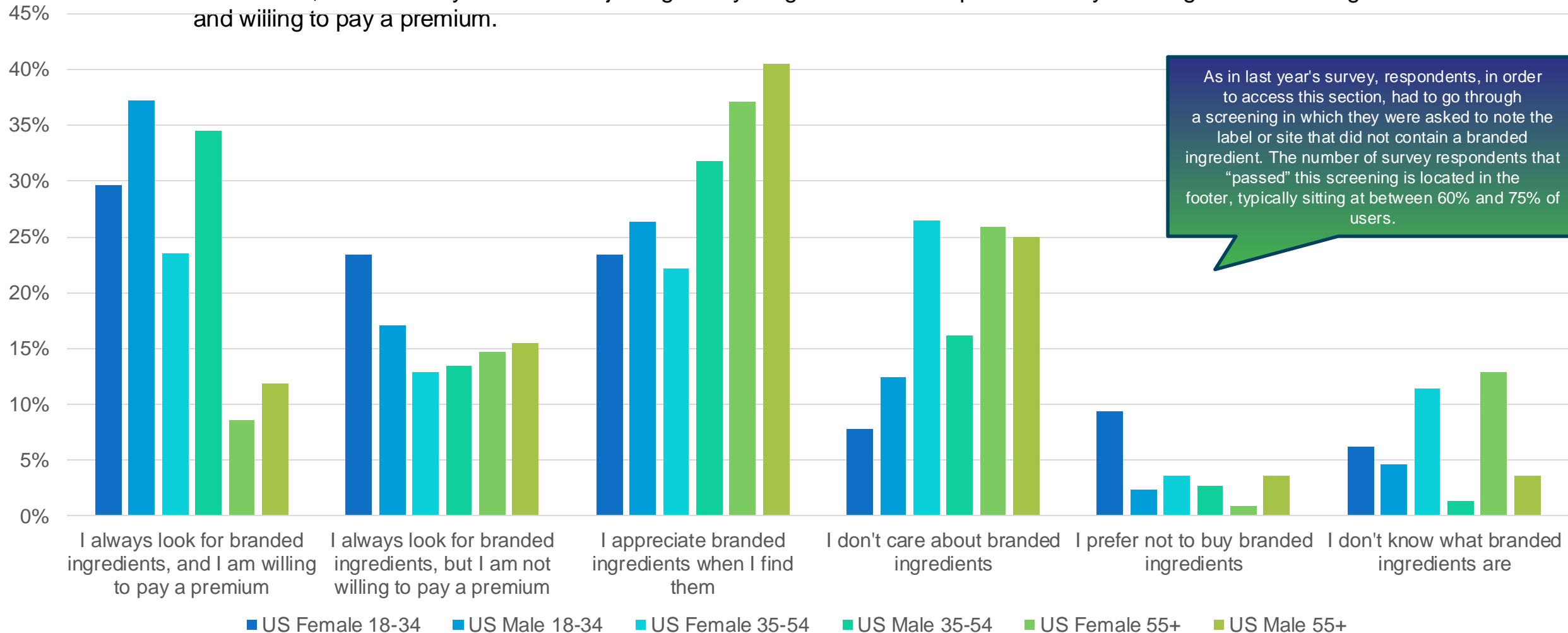
Note: US Female 18-34 n=103, US Male 18-34 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: "In which format do you prefer your supplements?"

BRANDED INGREDIENTS: US, AGE & GENDER



Key Insight:

- US respondents see more extreme differences with age related responses as well as higher responses for not caring about branded ingredients from males over 35 and females over 55.
- In this case, we see many males 35-54 joining their younger male counterparts in always looking for branded ingredients and willing to pay a premium.



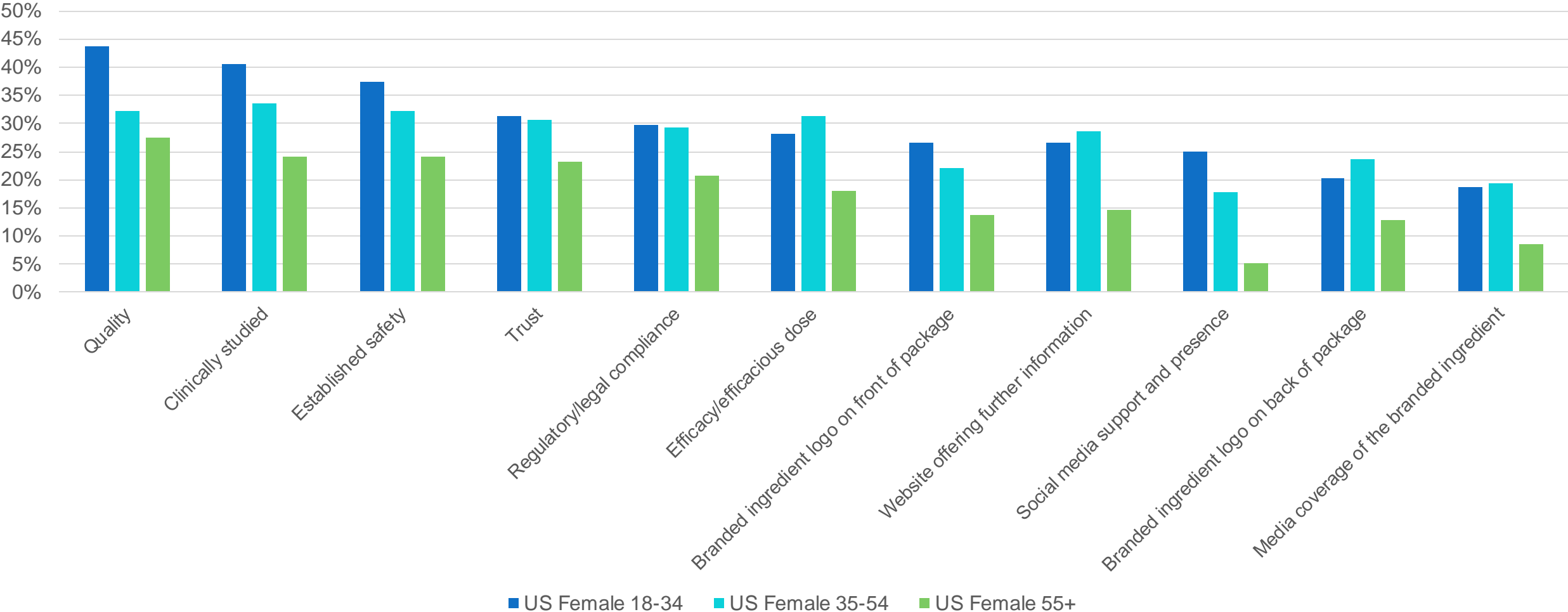


BRANDED INGREDIENT PRICE PREMIUM: US, AGE & GENDER



Key Insight:

- Younger females slightly over-index for each aspect.



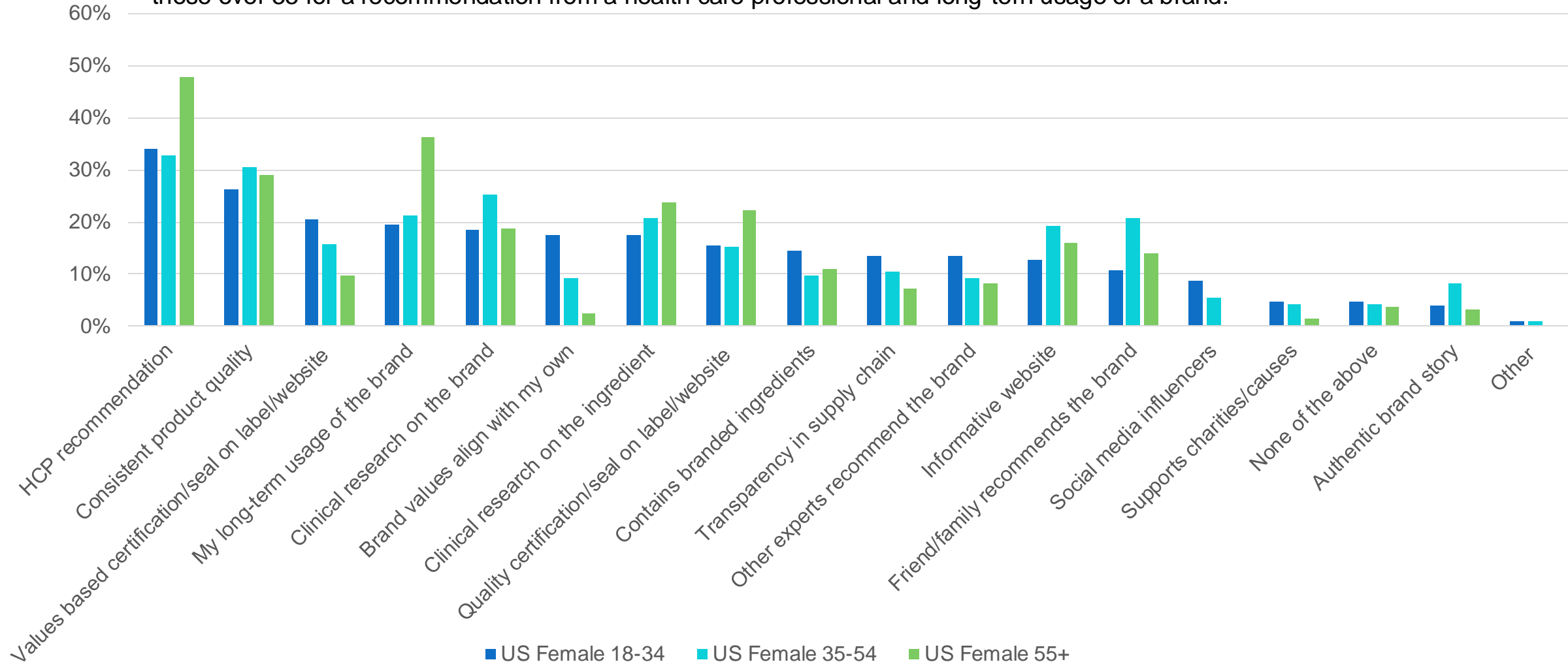
Note: US Female 18-34 n=64, US Male 18-34 n=129, US Female 35-54 n=140, US Male 35-54 n=148, US Female 55+ n=116, US Male 55+ n=84. Question: “When deciding which supplements to purchase, how much of a premium would you be willing to pay for the inclusion of a BRANDED INGREDIENT with the following features (versus the cheapest option available)?” Sum of top two responses marked “11% to 20% premium” and “More than 20% premium”

TRUST: US, AGE & GENDER



Key Insight:

- Age & gender responses are relatively even across the board from US respondents, with noticeable over-indexing for those over 55 for a recommendation from a health care professional and long-term usage of a brand.



Note: US Female 18-34 n=103, US Male 18-34 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: "What characteristics most encourage you to trust a supplement brand?"

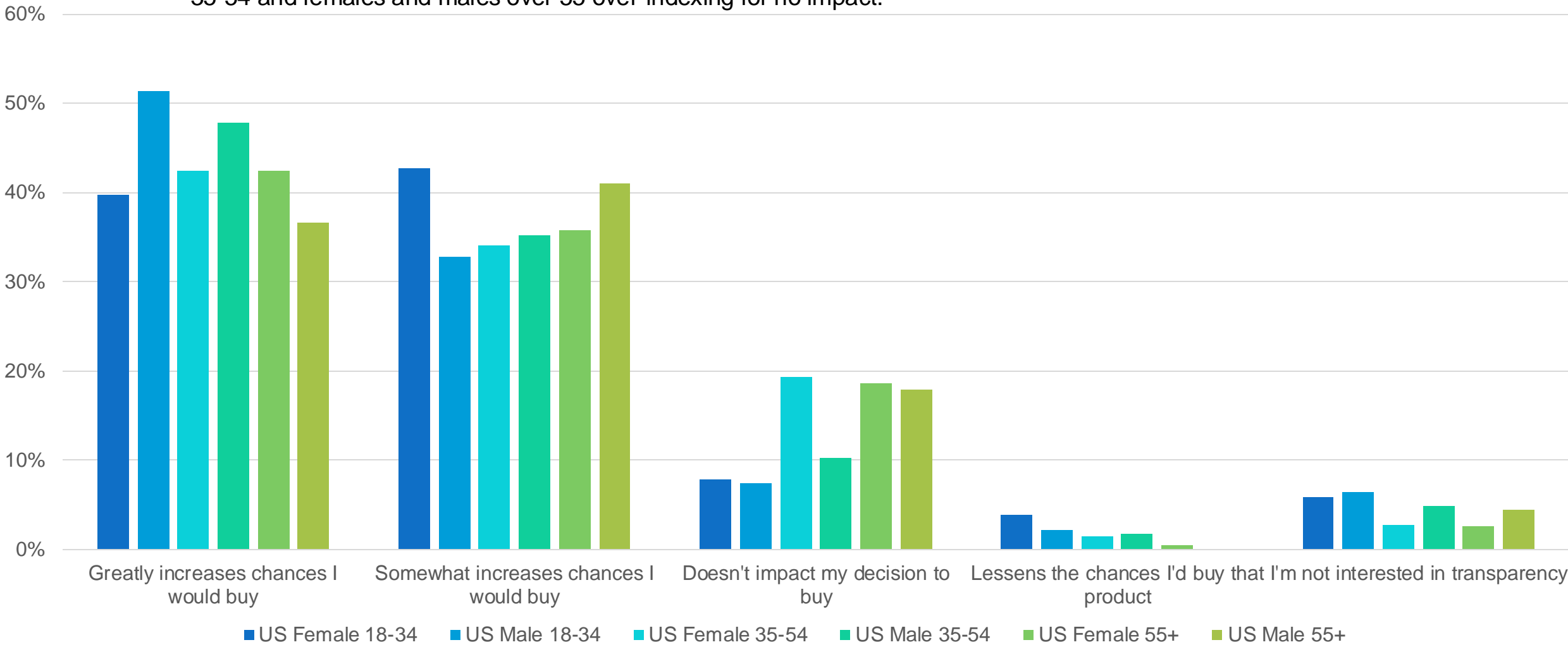


TRANSPARENCY PURCHASE INFLUENCE: US, AGE & GENDER



Key Insights:

- US responses have females and males 18-34 standing out more in the two positively influencing responses, with males 35-54 and females and males over 55 over-indexing for no impact.



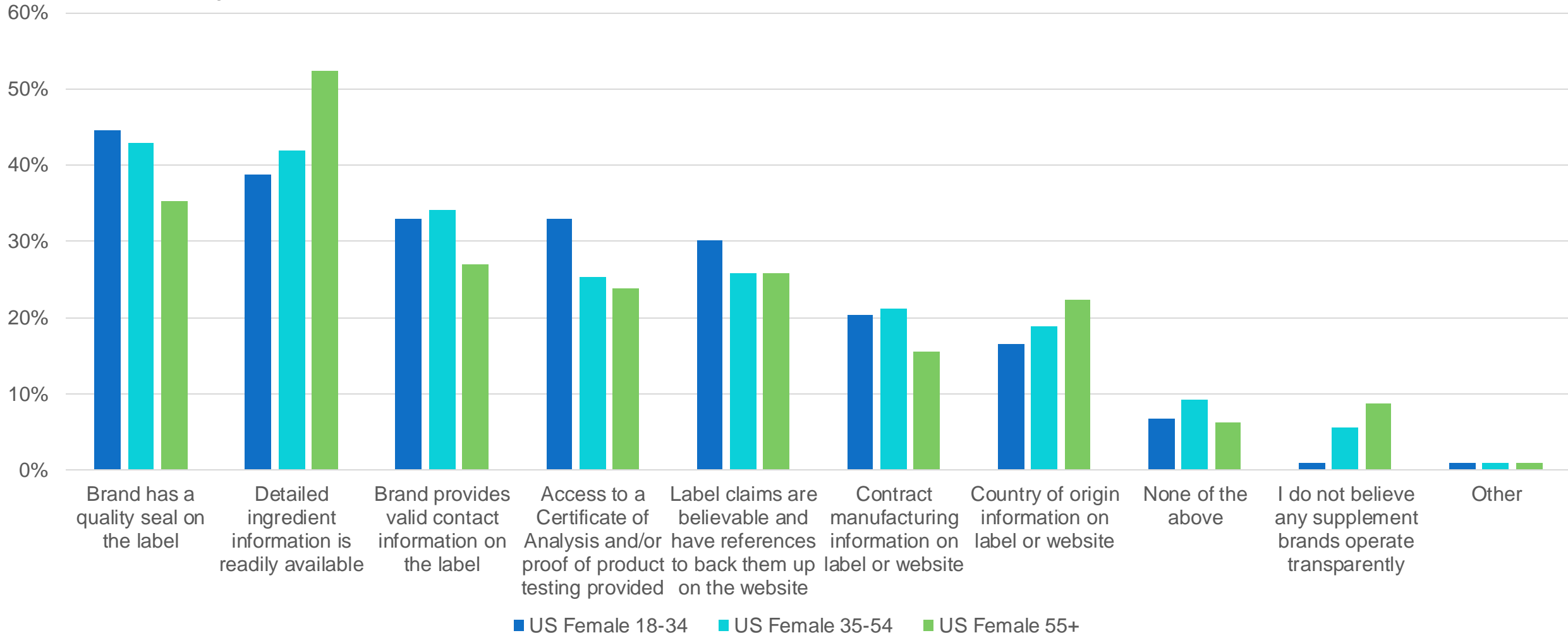
Note: US Female 18-34 n=103, US Male 18-34 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: "How likely are you to purchase supplements from a manufacturer that provides transparency information on its label or website?"

SIGNALS OF BRAND TRANSPARENCY: US, AGE & GENDER



Key Insight:

- US age & gender responses level out slightly but have more sharp outliers, such as females over 55 for detailed ingredient information.



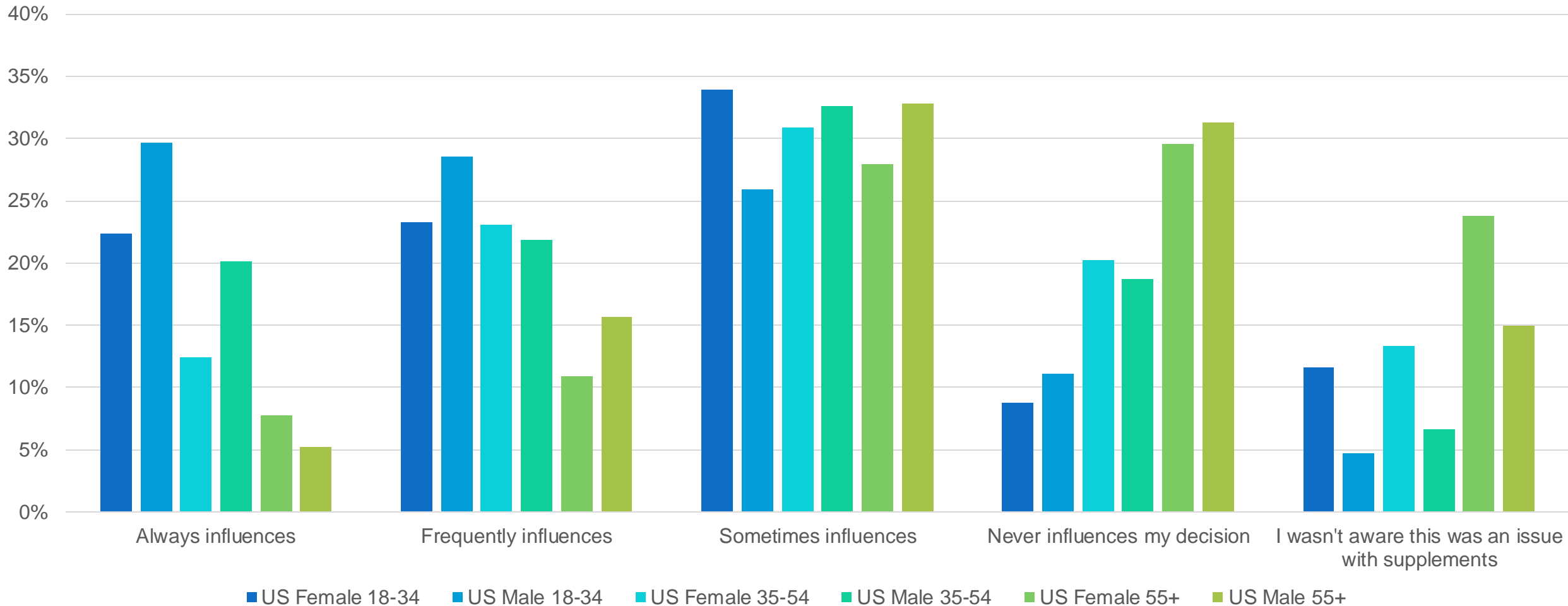
Note: US Female 18-34 n=103, US Male 18-34 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: "Which of the following items are the strongest signals that a supplement brand is operating transparently?"

SUSTAINABILITY: US, AGE & GENDER



Key Insights:

- Young females especially over-index for the 'sometimes' response..
- Not being aware of an issue is skewed to older females.



Note: US Female 18-34 n=103, US Male 18-34 n=189, US Female 35-54 n=217, US Male 35-54 n=224, US Female 55+ n=193, US Male 55+ n=134. Question: "When deciding which supplements to purchase, to what degree does the sustainability/environmental impact of a supplement ingredient influence your purchasing decision?"

QUESTIONS?

📞 +1 (303) 746-9555

✉️ len@itcstrategy.com

🌐 itcstrategy.com

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