

2022 SUPPLEMENT CONSUMER SURVEY





- Fielded by Dynata March 1-26, 2022
 Written & analyzed by Industry Transparency Center
- Center

 Survey of 3,500 consumers

 1,000 US, 1,000 China, 500 UK, 500 Germany, 500 tlaby

 Disqualfied poor quality responses and respondents who did not fit survey consumer
- respondents who did not fit survey consumer profile parameters

 General Criteria for Participation

 Supplement users

 Corrected for people who have proclaimed they are 'not a user' in questioning

 The information in this presentation is for the participation and they did not the properties.

recipient only and should not be shared in its entirety. You may share components of this survey data with attribution:

ITC Insights - 2022 Supplement Consumer

2

TABLE OF CONTENTS



This table of contents is hyperlinked to the sections. Just click the page number to jump to that section in

ALL SUPPLEMENTS

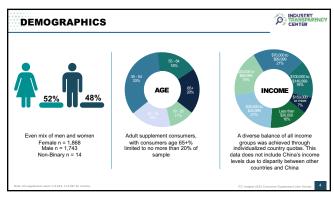
Page
4
16
42
75
92
118
141
169

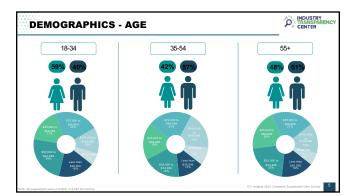
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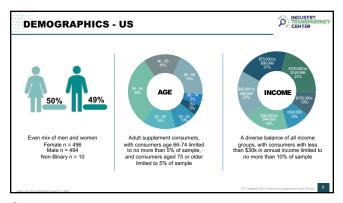
Section	Page
Demographics	
Usage	
Shopping Behavior	
Familiarity & Reasons They Buy	
Branded Ingredients	
Transparency, Trust & Sustainability	

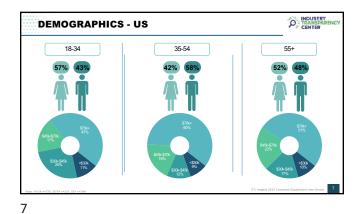
You can access primary data for charts by right clicking and opening the data in Excel.

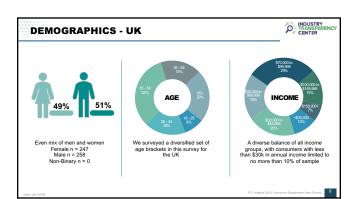
Country abbreviations in footers: United States = US, United Kingdom = UK, Germany = DE, Italy = IT, China = CN

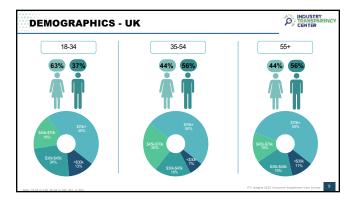


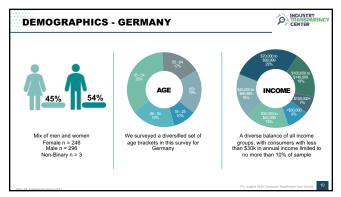


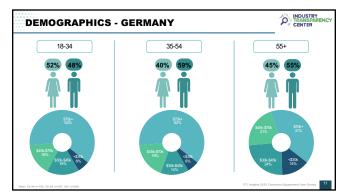


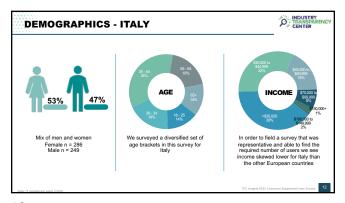


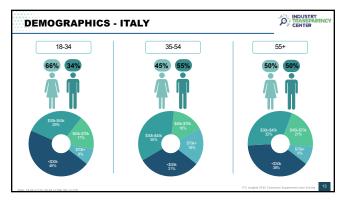


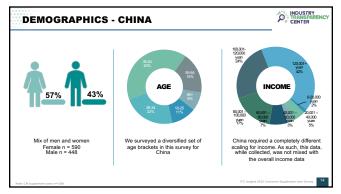


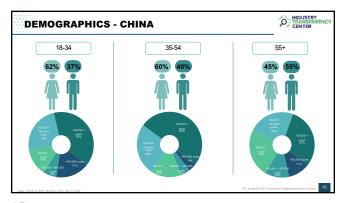




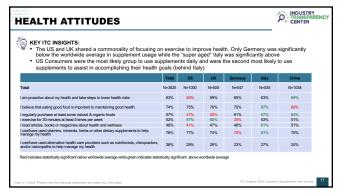


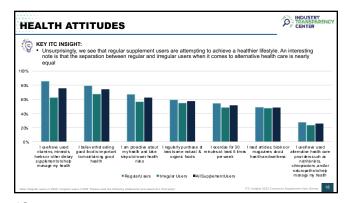


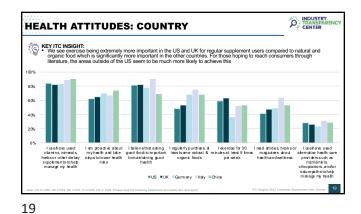


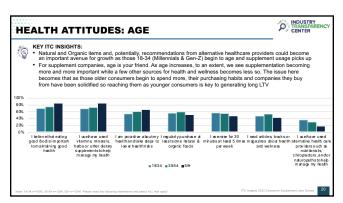


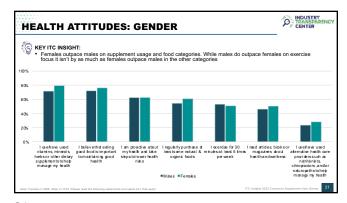


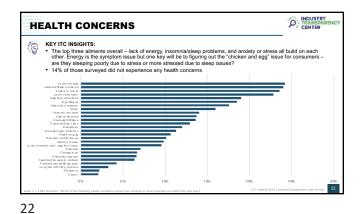


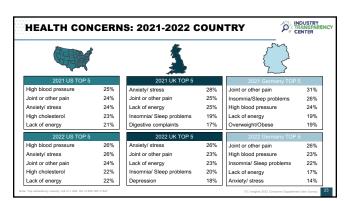




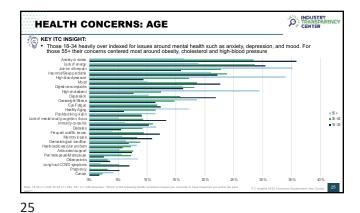


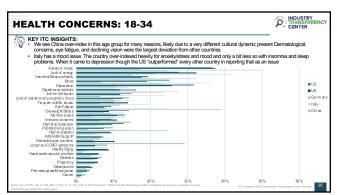




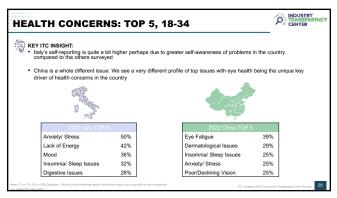


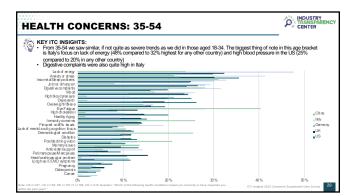
xxiety/ stress 38% Insomnia/ sleep problems 28% somnia/ Sleep problems 33% Immunity concerns 27%				
ck of energy 41% Poor/ declining vision 35% oxiety/ stress 38% Insomnia/ sleep problems 28% somnia/ Sleep problems 33% Immunity concerns 27%	D. J.			
Insomnia/ sleep problems	2022 Italy TOP 5		2022 China TOP 5	
somnia/ Sleep problems 33% Immunity concerns 27%	Lack of energy	41%	Poor/ declining vision	35%
	Anxiety/ stress	38%	Insomnia/ sleep problems	28%
int or other pain 30% Mental acuity, cognition, or 24%	Insomnia/ Sleep problems	33%	Immunity concerns	27%
	Joint or other pain Mental acuity, cognition, or		Mental acuity, cognition, or focus	24%
	focus	2.70	Dermatological concerns	21%



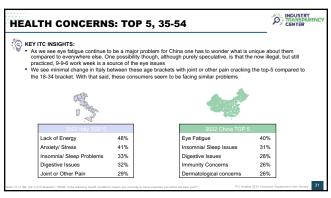


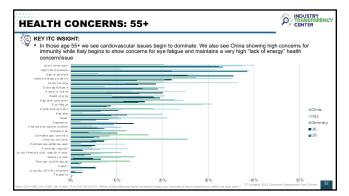
ERNS	6: TOP 5, 18-34		(2)	NDUSTRY TRANSPARENC CENTER
sely mimio	c each other with all the top-5 is 3 around the stress-sleep-ene	sues tied to gy cyclical	o mental concerns whereas Ge issue	rmany
	1			
	2022 UK TOP 5		2022 Germany TOF	5
37%	Anxiety/ stress	38%	Lack of Energy	21%
32%	Lack of Energy	32%	Insomnia/Sleep Issues	20%
28%	Depression	26%	Anxiety/ Stress	18%
25%	Mood	19%	Joint of Other Pain	13%
19%	Insomnia/Sleep Issues	18%	Digestive Issues	12%
	sely mimi as the top 37% 32% 28%	sely mimic each other with all the top-5 is the top-3 around the stress-sleep-ener 2022 UK TOP-5 Anxiety/ stress Lack of Energy Depression	2022 UK TOP 5 37% Anxiety/stress Lack of Energy 28% Depression 26%	sely mimic each other with all the top-5 issues tied to mental concerns whereas Ge is the top-3 around the stress-sleep-energy cyclical issue 2022 UK TOP 5 Anxiety/ stress 37% Lack of Energy 32% Lack of Energy 32% Depression 26% Anxiety/ Stress Anxiety/ Stress



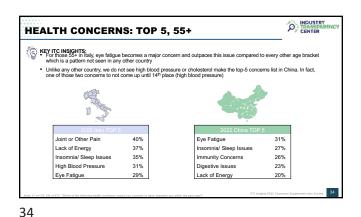


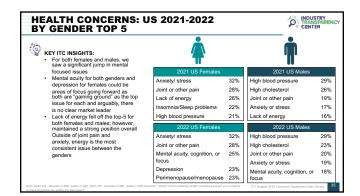
HEALTH CONC	ERNS	: TOP 5, 35-54		<u> </u>	NDUSTRY TRANSPAREN CENTER
KEY ITC INSIGHTS: • While in the 18-34 bracke reported issue in the 35-5 high blood pressure might	t we saw depr 4 age bracket. t be related	ession as a common issue, only th With the coping defaults that depr	e US continue ession tends t	is to see it persist as a significant s o lead to cause, one has to wonde	elf- r if the
 We see joint and other pa relieve these issues and s 	in quickly incre secure a VERY	ease in this age bracket. This is the Y high LTV customer	key time to g	et consumers trusting in your bran	d to
2022 US TOP 5		2022 UK TOP 5		2022 Germany TOF	9.5
	36%	Lack of Energy	32%	Insomnia/Sleen Issues	30%
Anxiety/stress Lack of Energy	36% 30%	Lack of Energy Anxiety/ Stress	32% 30%	Insomnia/Sleep Issues Joint or Other Pain	30% 28%
Anxiety/stress					
Anxiety/stress Lack of Energy	30%	Anxiety/ Stress	30%	Joint or Other Pain	28%

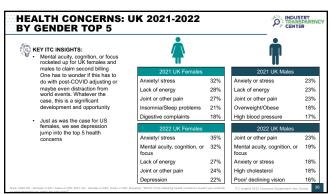


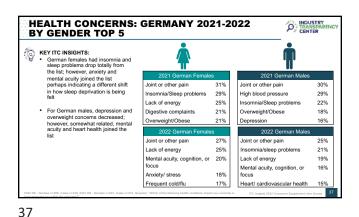


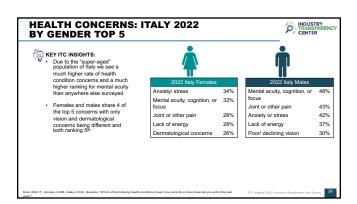
EALTH CONC	ERNS	6: TOP 5, 55+		Ø t	DUSTRY RANSPAREN ENTER
 KEY ITC INSIGHT: While not showing up in 	the US, w	e still see the "triple threat" of an	xietv/stres	s – insomnia – energy issue higi	hlv
		e still see the "triple threat" of an the same for Germany. The truth real breakthrough global potentia		matter the age, solving or reliev	/ing
		est levels of concerns, most nota		age group	
		1			
2022 US TOP 5		2022 UK TOP 5		2022 Germany TOP 5	5
High Blood Pressure	39%	Joint or Other Pain	32%	High Blood Pressure	39%
High Cholesterol	36%	Insomnia/ Sleep Problems	25%	Joint or Other Pain	38%
Joint or Other Pain	33%	High Blood Pressure	22%	High Cholesterol	23%
	20%	Insomnia/Sleep Problems	22%	Insomnia/ Sleep Problems	21%
Healthy Aging			20%	Overweight	



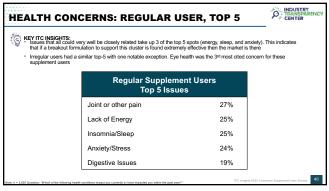


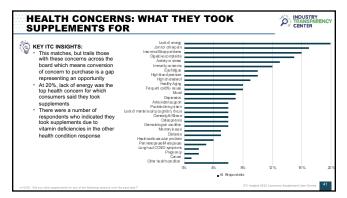




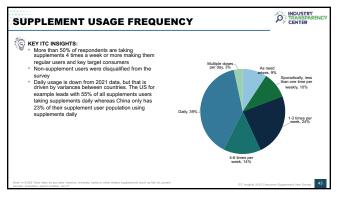


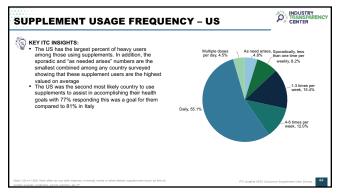
HEALTH CONCERNS: CHINA 2022 BY GENDER TOP 5 KEY ITC INSIGHTS: EY ITC INSIGHTS:
The most unique thing about China compared to the other four countries surveyed is the high ranking of immunity concern. This isn't surprising though as the entire Asian area has been focusing on public health and immunity since SARS in 2003 Lack of energy 30% ack of energy Immunity concerns 27% Diabetes Poor/ declining vision 22% While the top-2 are the same for both females and males we see top issues vary greatly between the two groups in positions 3 through 5 26% Mental acuity, cognition, or focus 21% Anxiety/ stress 20% Joint or other pain 19%

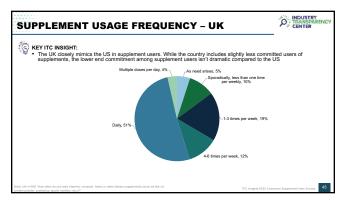


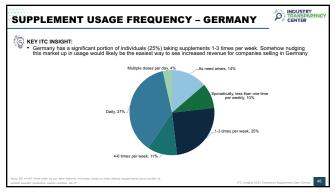


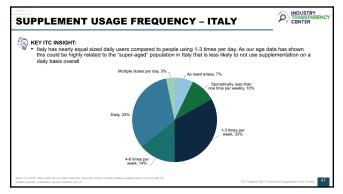


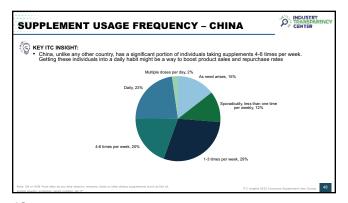


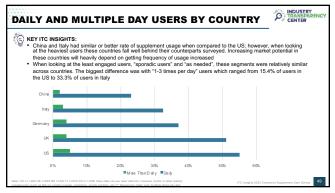


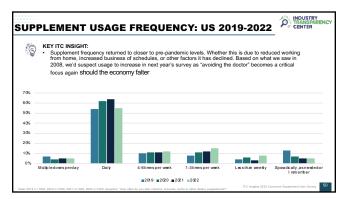


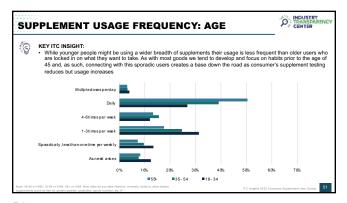








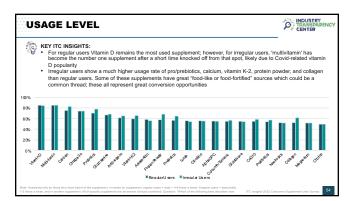


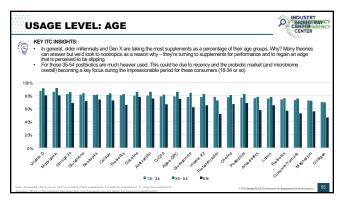


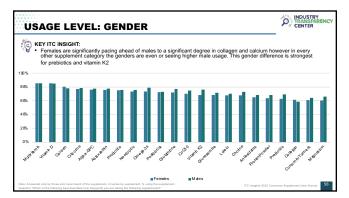
WHAT SUPPLEMENTS THEY TAKE: ACROSS COUNTRIES (UNAIDED RESPONSES) KEY ITC INSIGHTS: The list of unaided supplements overall has not changed from 2021 though the percentages have decreased—this is likely due to the addition of two other countries and consumer conflusion on what they actually take While they didn't make top lists, we also saw an increase in consumers writing in prebiotics, probiotics and positiotics Country Top 3 TOP 7 ALL COUNTRIES Multivitamin Vitamin C Vitamin D US UK Multivitamin Vitamin D Vitamin C Multivitamins 30% Vitamin C 24.5% Germany Vitamin D Magnesium B Vitamins Multivitamin C Multivitamin B Vitamins Vitamin C Multivitamin B Vitamins Italy 24.3% Vitamin D China 18% B Vitamins Omegas 10% Calcium 8.5% Magnesium

52

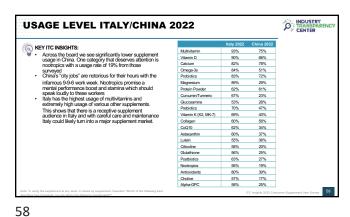
SAGE LI	EVEL I	BY SU	PPLEN	IENT I	NGRE	DIENT	^^P	INDUSTRY TRACKED E CENTER CENTER
			Regula	ar User		Irregular User		
Summlement	N=	User	Daily	4-6 times	1-3 times	Seasonally/As Needed	It's in another	Nover
Supplement Multivitamin	N= 3.458	User 85%	Delly 28%	per week 10%	per week 18%	Needed 22%	supplement I take	Never 15%
Mutwamn Mamin D	3,406	84%	27%	9%	18%	23%	8%	16%
Calcium	3,510	79%	19%	10%	18%	23%	10%	21%
Prohintos	3,367	74%	14%	11%	17%	27%	5%	26%
Omega-3	3,307	74%	19%	10%	16%	27%	5%	26%
Magnesium	3,340	67%	15%	9%	14%	21%	8%	33%
Antiministratis	3,302	63%	12%	9%	13%	22%	7%	37%
Lifein	2.498	62%	9%	10%	12%	19%	6%	45%
Protein Powder	3,265	62%	12%	11%	15%	21%	4%	38%
Vitamin K2	2,677	62%	10%	10%	14%	21%	7%	38%
Prehiotics.	3,078	60%	9%	8%	15%	23%	4%	40%
Astavanthin	1.984	57%	9%	11%	13%	20%	4%	43%
Collagen	3.308	58%	11%	9%	12%	20%	5%	44%
Curcumin/Turmeric	3.077	56%	11%	8%	14%	19%	4%	44%
Postbiotics	2.230	56%	10%	10%	12%	20%	4%	44%
CoQ10	2.290	55%	11%	10%	12%	18%	5%	44%
Alpha-GPC	1,870	55%	8%	12%	13%	18%	4%	45%
Citicoline	1,807	55%	8%	11%	14%	17%	4%	45%
Gutathione	2.026	54%	8%	11%	13%	19%	4%	46%
Glucosamine	2,765	52%	11%	8%	11%	16%	5%	48%
Nootropics	1,925	52%	8%	11%	14%	16%	4%	48%
Choline	2,134	49%	8%	9%	12%	15%	5%	51%



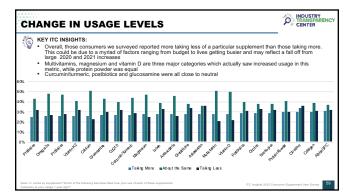




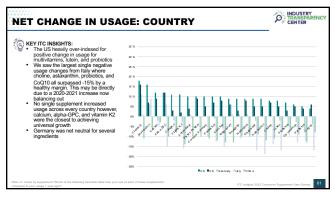
KEY ITC INSIGHTS:		US 2021	US 2022	UK 2021	UK 2022	Germany 2021	Germany 202
For 2022 we removed an	Vitamin D	79%	90%	86%	93%	89%	94%
awareness smoothing element	Multivitamin	81%	88%	79%	80%	86%	91%
to the data, this caused	Calcium	67%	77%	61%	60%	86%	87%
significant jumps in certain	Omega-3s	61%	77%	76%	83%	77%	86%
supplements	Probiotics	53%	73%	55%	69%	58%	73%
 Of note, even accounting for 	Magnesium	52%	73%	58%	63%	95%	95%
this movement, we saw	Protein Powder	43%	61%	45%	55%	58%	71%
significant gains for Astaxanthin with self-reported	Curcumin/Turmeric	50%	62%	54%	62%	64%	76%
usage increasing +21% in the	Glucosamine	40%	60%	45%	63%	34%	67%
US. +23% in UK. and +20% in	Prebiotics	42%	62%	49%	63%	56%	69%
Germany	Vitamin K (K2, MK-7)	48%	67%	49%	70%	60%	82%
 We also had significant 	Collagen	41%	57%	39%	49%	49%	59%
increases in usage for	CoQ10	49%	64%	53%	66%	61%	74%
citicoline and glutathione. It is	Astaxanthin	57%	78%	55%	78%	56%	76%
possible glutathione's	Lutein	na	65%	na	69%	Na	74%
increase was partially due to Amazon's ban of NAC which	Citicoline	54%	78%	50%	80%	54%	75%
caused many brands to move	Glutathione	50%	72%	51%	75%	53%	71%
to glutathione	Postbiotic	50%	66%	58%	60%	63%	70%
	Nootropics	na	72%	na	69%	na	74%
	Anticaldants	na	71%	na	63%	na	71%
	Choline	na	66%	na	69%	na	68%
: % using the supplement at any level, n+varies by firment. Question "Which of the following best	Alpha-GPC	na	71%	na	79%	na	78%

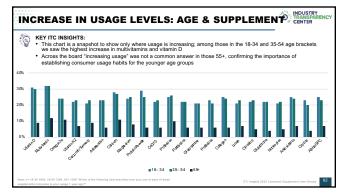


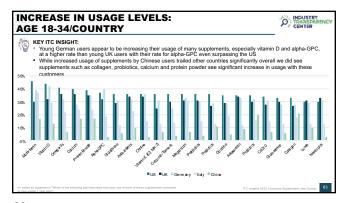
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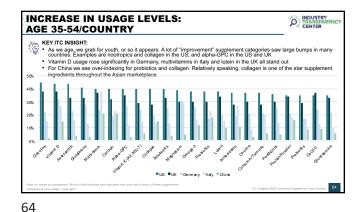


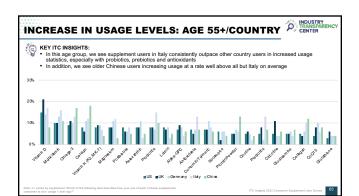
NET CHANGE IN USAGE (EXECUTE INSIGHTS: Outside of omega-3s, the most mass-market friendly supplements		M	Vitamin E utivitamin					_	(0)	NDUST TRANSI CENTER	RY PARENC
saw the best results in net change Despite lack of energy and focus being answers of issues people are dealing with, notropic use declined The prespostyro biotics segments (especially the latter 2) were and down in this measure. This could indicate a lack of fath among users that these products are delivering on their claims		An	agnesium Caldium tibxidants nPowde		Astaxanthin Prebiotics Glutathione Vitamin K (K Citicoline CoQ10 Lutein Nootropics Postbiotics Glucosamin Probiotics Alpha-GPC Collagen Omega-3s Curcumin/Te	e urmeric					
	-15%	-10%	-5%	09	5 5%	10%	15%	20%	25%	30%	35%

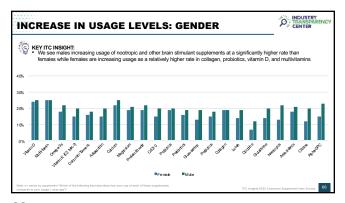


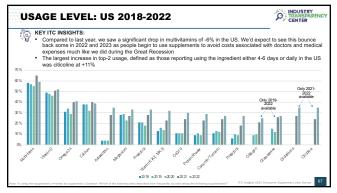


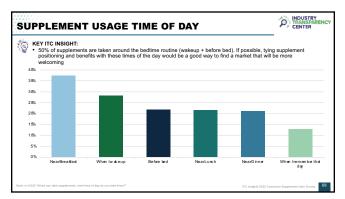


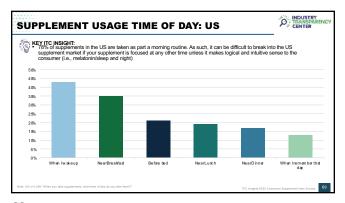


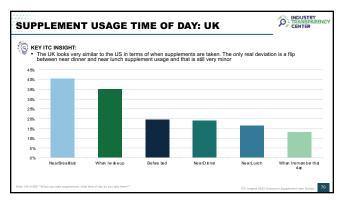


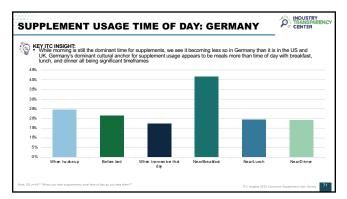


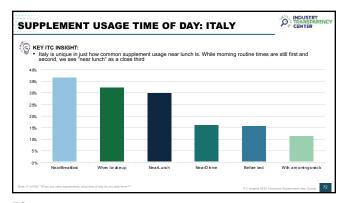


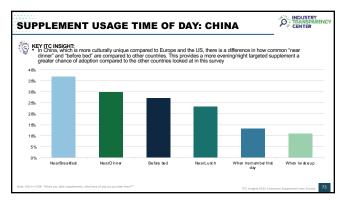


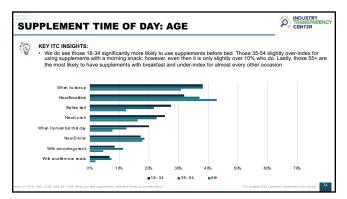




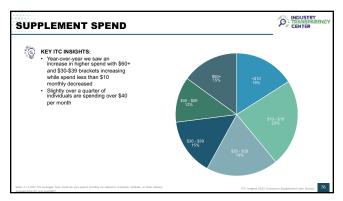


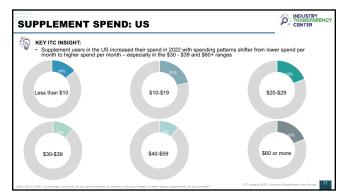


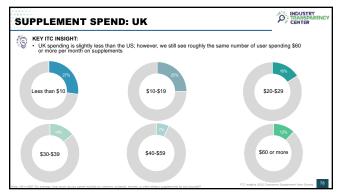


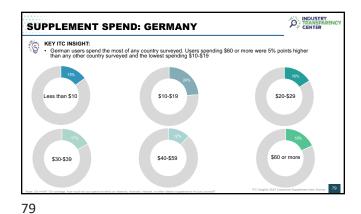




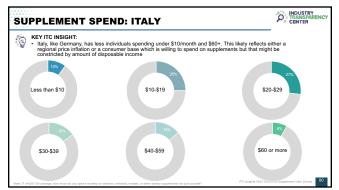


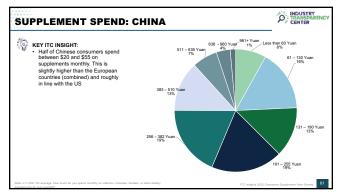


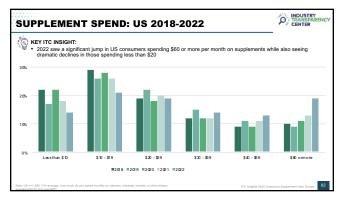


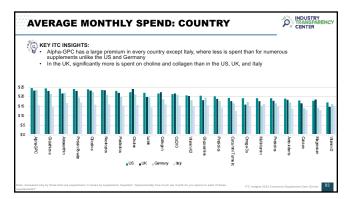


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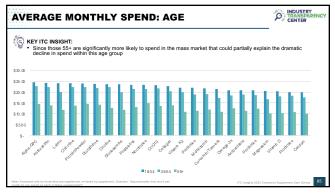


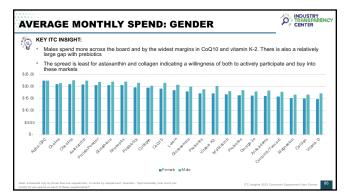






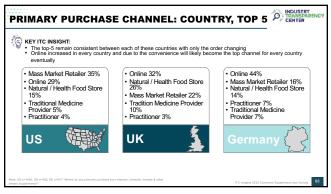


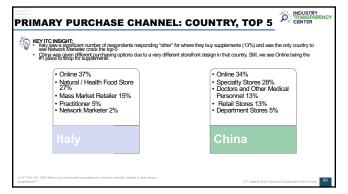


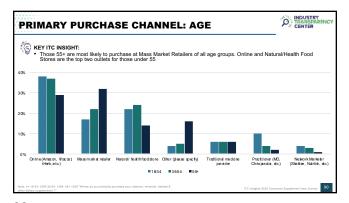


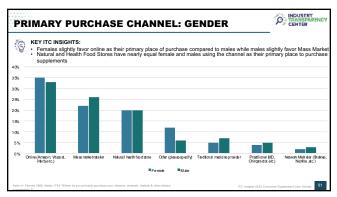
ħ	Supplement	2022	2021	\$ Increase	% Increase
We saw significant increases in	Magnesium	\$15.87	\$12.89	\$2.98	23.10%
spend across the board, with only	Calcium	\$15.82	\$12.97	\$2.85	22.00%
three categories having single-digit increases in spend	Vitamin D	\$16.00	\$13.17	\$2.83	21.50%
moreaded in opena	Omega-3	\$17.18	\$14.32	\$2.86	20.00%
This increase across the board is	Multivitamin	\$17.41	\$14.75	\$2.66	18.00%
likely due to both increases in price and product mix	Vitamin K	\$18.76	\$16.07	\$2.69	16.70%
	Glucosamine	\$18.98	\$16.55	\$2.43	14.70%
	Probiotics	\$17.42	\$15.33	\$2.12	13.80%
	Curcumin/Turmeric	\$16.89	\$15.33	\$1.56	10.20%
	Protein Powder	\$21.31	\$19.59	\$1.72	8.80%
	Prebiotics	\$18.08	\$16.77	\$1.31	7.80%
	CoQ10	\$20.35	\$18.99	\$2.43	7.10%
	Collagen	\$19.90	\$18.81	\$1.09	5.80%
	Astaxanthin	\$21.76	\$21.12	\$0.64	3.00%

KEY ITC INSIGHTS:	Supplement	2022	2021	\$ Increase	% Increase
We saw significant increases in	Magnesium	\$15.87	\$12.89	\$2.98	23.10%
spend across the board, with only	Calcium	\$15.82	\$12.97	\$2.85	22.00%
three categories having single-digit increases in spend	Vitamin D	\$16.00	\$13.17	\$2.83	21.50%
moreaded in spend	Omega-3	\$17.18	\$14.32	\$2.86	20.00%
 This increase across the board is likely due to both increases in price 	Multivitamin	\$17.41	\$14.75	\$2.66	18.00%
and product mix	Vitamin K	\$18.76	\$16.07	\$2.69	16.70%
·	Glucosamine	\$18.98	\$16.55	\$2.43	14.70%
	Probiotics	\$17.42	\$15.33	\$2.12	13.80%
	Curcumin/Turmeric	\$16.89	\$15.33	\$1.56	10.20%
	Protein Powder	\$21.31	\$19.59	\$1.72	8.80%
	Prebiotics	\$18.08	\$16.77	\$1.31	7.80%
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	Astaxanthin	\$21.76	\$21.12	\$0.64	3.00%



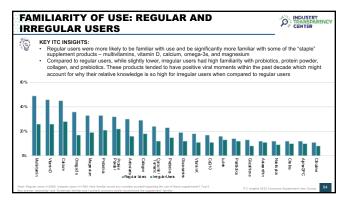


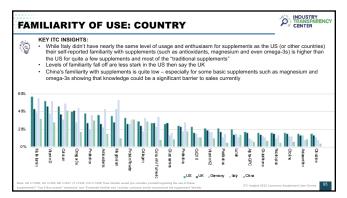


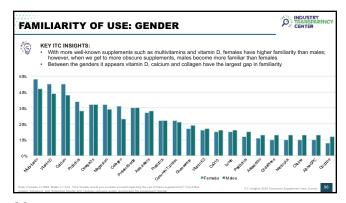


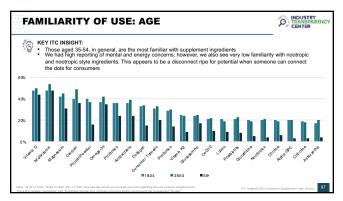


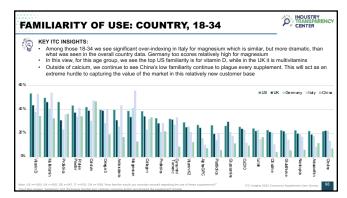
OVERALL FAM	IILIARIT	ſΥ					CENT	ISPARENC FER
KEY ITC INSIGHTS: As one would expect,		Extremely familiar and consume and/or recommend	Extremely familiar	Very familiar	Moderately familiar	Minimally familiar	All Familiarity	Never hear of it
calcium and vitamin D	Calcium	19%	22%	26%	22%	8%	97%	3%
have the highest overall	Vitamin D	22%	20%	25%	22%	8%	97%	3%
familiarity and multivitamins have the highest familiarity and use and/or recommendation At least half of	Multivitamin	24%	21%	23%	19%	8%	95%	5%
	Probiotics	15%	16%	21%	26%	15%	93%	7%
	Omega-3s	15%	17%	22%	25%	13%	92%	8%
	Collagen	10%	17%	19%	25%	20%	91%	9%
	Magnesium	15%	16%	20%	23%	17%	91%	9%
	Protein Powder	12%	18%	19%	22%	19%	90%	10%
supplement users in this	Antioxidants	10%	17%	20%	25%	17%	90%	10%
survey were at least	Prebiotics	9%	13%	19%	25%	19%	85%	15%
somewhat familiar with	Curcumin/Turmeric	9%	13%	18%	22%	23%	85%	15%
each ingredient	Glucosamine	7%	11%	15%	20%	24%	76%	24%
Respondents had lower	Vitamin K2	6%	10%	14%	20%	24%	74%	26%
than expected familiarity	Lutein	5%	10%	14%	21%	19%	69%	31%
	CoQ10	6%	9%	12%	16%	20%	63%	37%
with glucosamine, vitamin	Postbiotics	5%	9%	12%	16%	21%	62%	38%
K2, and curcumin/turmeric	Choline	4%	8%	11%	14%	22%	59%	41%
opening the door for	Glutathione	4%	8%	11%	14%	20%	56%	44%
education in those	Astaxanthin	4%	8%	11%	16%	16%	55%	45%
categories	Nootropics	4%	8%	10%	13%	18%	53%	47%
outogorioo	Alpha-GPC	4%	7%	9%	13%	18%	52%	48%
	Citicoline	3%	7%	9%	12%	18%	50%	50%

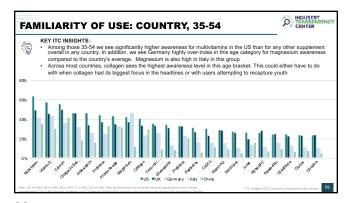


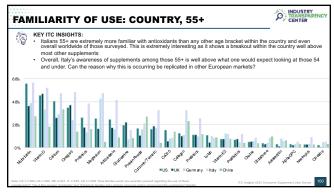


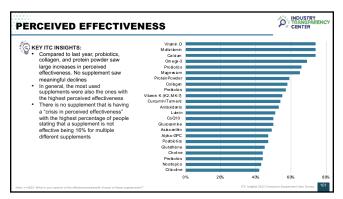


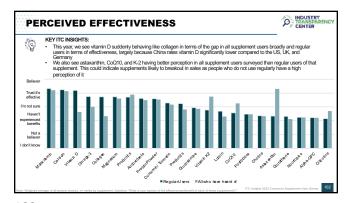


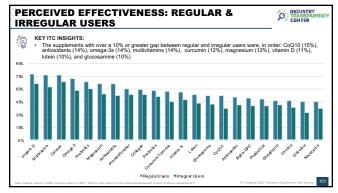


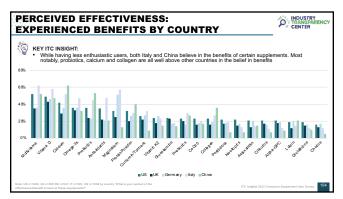


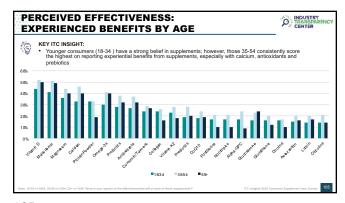


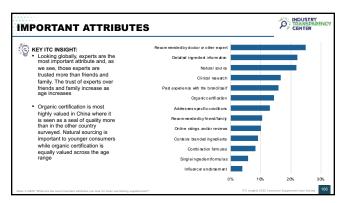


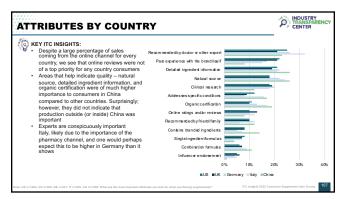






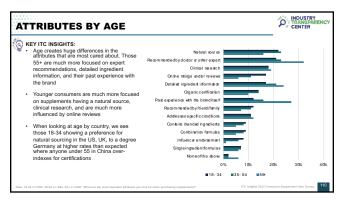


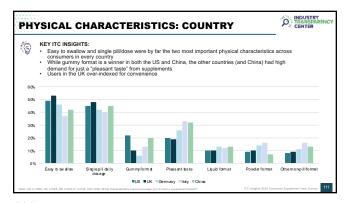


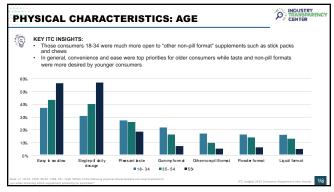


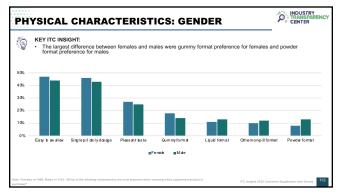
KEY ITC INSIGHT: For the US, UK, and Germany to Recommended by Doctor other commended by Doctor other comments are the proof for elliptic.	he top5 most important attributes were the sa Expert appearing first and clinical search app al research really being the hero attribute for	ame with just a different order. With pearing in the top-5 of all three an codestion of purplements.
Recommended by Doctor or Other Expert: 25% Past Experience With Brand 22% Detailed Ingredient Information 21% Natural Source 18% Clinical Research 18%	Recommended by Doctor or Other Expert: 21% Past Experience With Brand: 21% Clinical Research: 19% Detailed Ingregient Information: 19% Natural Source: 18%	Recommended by Doctor or Other Expert: 26% Detailed Ingredient Information 22% Natural Source: 22% Clinical Research: 20% Past Experience With Brand 17%
us	UK 💃	Germany (

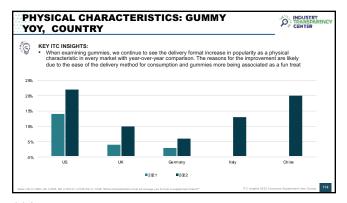


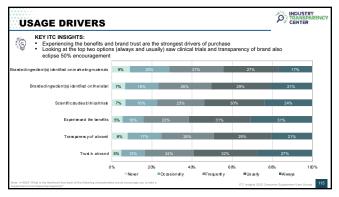


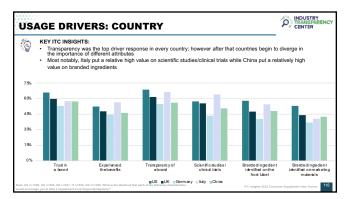


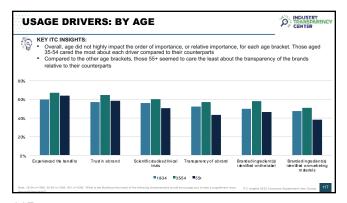




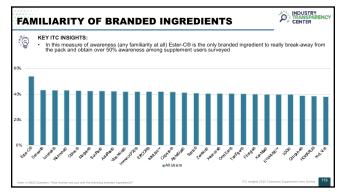


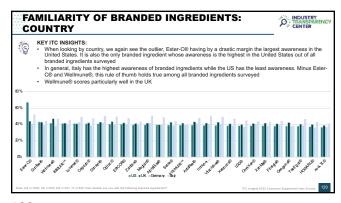


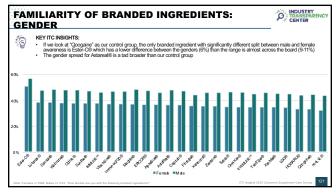


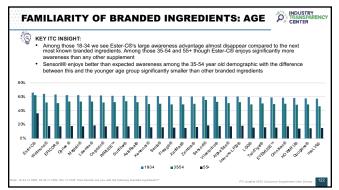


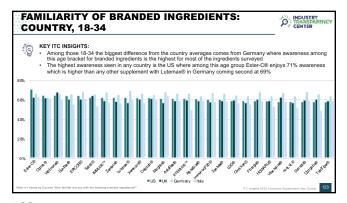


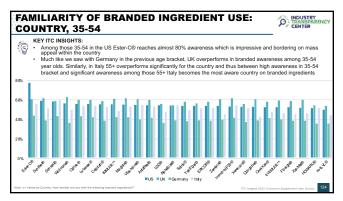


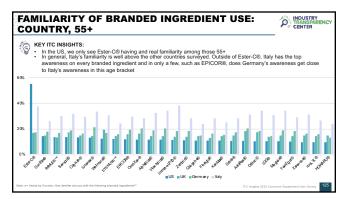


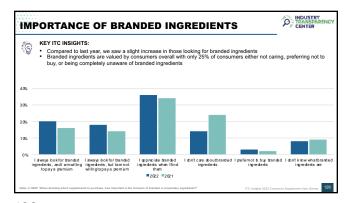


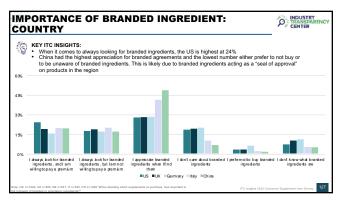


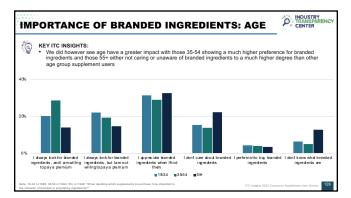






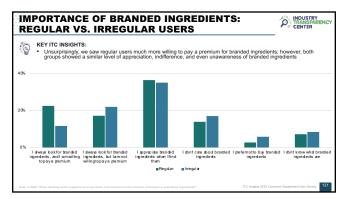


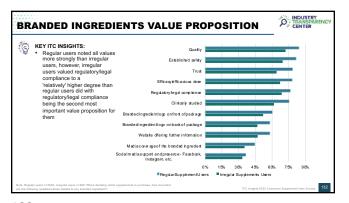


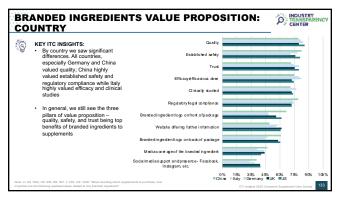


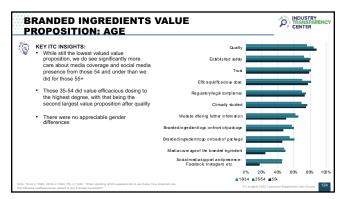
KEY ITC INSIGHTS: While the high-end of premium went down year-over-year, astaxanthin remains the top of our previously surveyed supplements Commoditized or non-differentiated categories continue to post lower branded ingredient scores															
• Con	Astavanthin			tiated ca	Prebiotics	Vitamin K	Protein Powder	Curcumin/ Turmeric	led ingred	Omegas		Caldium	Vitamin D	Multivitamin	Glucosamir
	n=1984	n=2290	n=3308	n=2230	n=3078	n=2677	n=3265	n=3077	n=3367	n=3345	n=3302	n=3525	n=3510	n=3458	n=2765
I always look for branded ingredients, and willing to pay a premium	27%	25%	21%	25%	22%	23%	21%	22%	21%	21%	21%	21%	21%	21%	23%
I always look for branded ingredients, but not willing to pay a premium	22%	20%	19%	21%	19%	20%	19%	19%	19%	19%	19%	18%	18%	19%	19%
l appreciate branded ingredients when I	36%	35%	37%	36%	37%	36%	37%	36%	36%	35%	36%	37%	36%	36%	36%
find them I don't care about branded ingredients	8%	13%	14%	11%	13%	12%	14%	14%	14%	14%	14%	14%	14%	15%	13%
I prefer not to buy branded ingredients	4%	4%	3%	4%	3%	3%	3%	4%	3%	3%	3%	3%	3%	3%	4%
I don't know what branded incredients are	3%	4%	6%	4%	5%	5%	6%	6%	7%	7%	7%	7%	7%	7%	5%

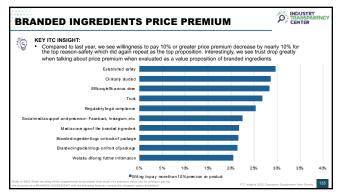
Y ITC INSIGHTS: Of the new supplement	e euniouad	wa saa ma	mon, perfo	rmance cun	nlamente hav	e the highe	et overall k
ingredient premium der advantages are likely to	mand. This is	unsurprisi	ng as these	users tend	to be looking	for an adv	antage and
	n=2498	n=1807	n=2026	n=1925	n=3258	n=2134	n=1870
I always look for branded ingredients, and willing to pay a premium	24%	28%	27%	28%	21%	25%	27%
I always look for branded ingredients, but not willing to pay a premium	20%	22%	21%	21%	19%	21%	22%
I appreciate branded ingredients when I find them	37%	34%	36%	36%	36%	36%	36%
I don't care about branded ingredients	11%	8%	9%	9%	14%	11%	8%
I prefer not to buy branded ingredients	4%	4%	4%	4%	3%	4%	4%
I don't know what branded incredients are	4%	3%	3%	3%	6%	3%	2%

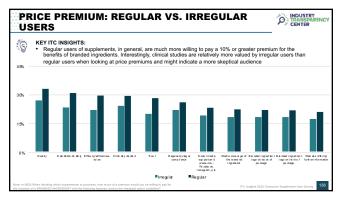


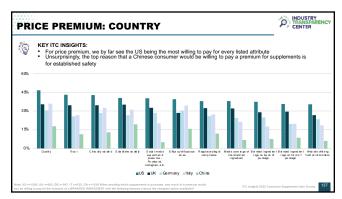


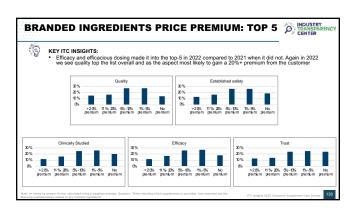


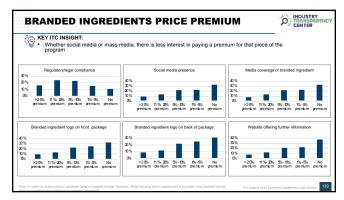




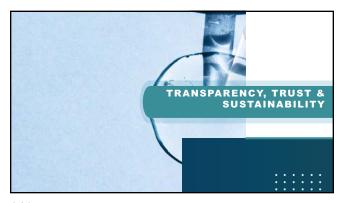


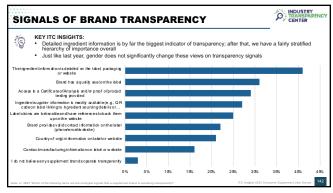


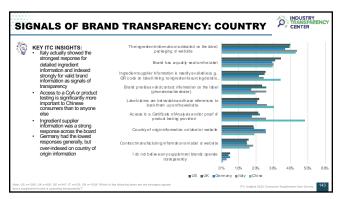


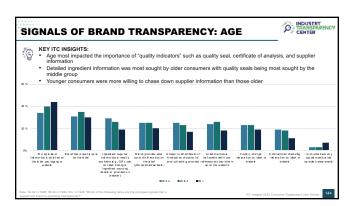


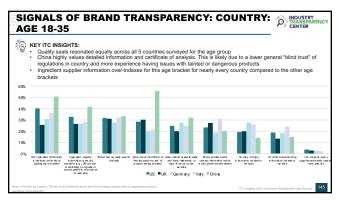
BRANDEI	D INGRE NESS TO	PAY A PREMIUM	E AND	D TRAMSPARENC GENTER
	Importance (Top 2 Box)	Attribute	Willing to pay a premium (Top 2 box)	
	82%	Quality	32%	
	79%	Established safety	30%	
	76%	Trust	27%	
	76%	Efficacy/efficacious dose	28%	
	73%	Clinically studied	29%	
	75%	Regulatory/legal compliance	25%	
	59%	Branded ingredient logo on front of package	21%	
	56%	Website offering further information	21%	
	56%	Branded ingredient logo on back of package	22%	
	43%	Media coverage of the branded ingredient	22%	
	36%	Social media support and presence - Facebook, Instagram, etc.	22%	
	int are the following qualities/val	1%-20% premium + more than 20% premium. Question 1: "When deciding ses related to any branded ingredient? Question 2: "top 2 answer choices		Consumer Supplement User Survey 140

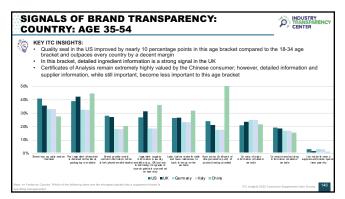


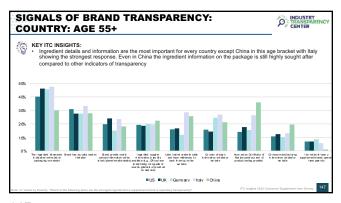


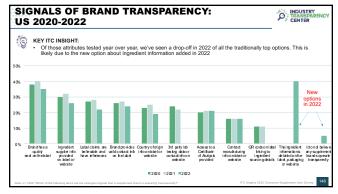


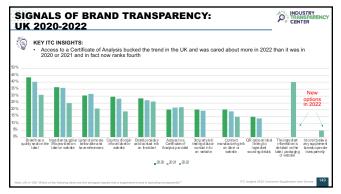


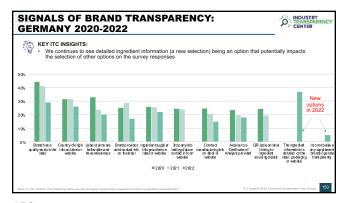




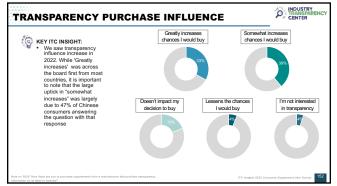


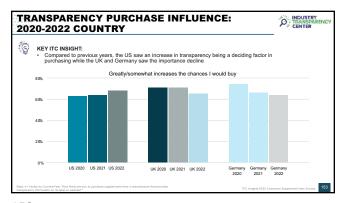


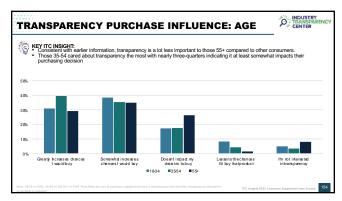


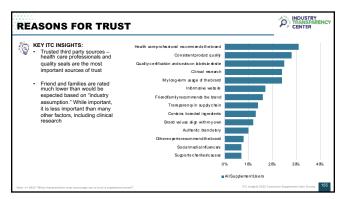


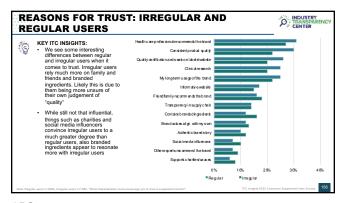
SIGN.																			زور	TRAN CENT	ER	CENI
(KEY I • Ing • On	redier	nt infor	mation	on th	e labe	l was atego	across ry whe	the b	oard th A as a	ne mos n indic	st impo ator of	ortant a transp	aspect parenc	in tran	nspare under	ncy, fo	ollowe	d by a	quality	/ seal		
		Problodics	Viterain IQ			Wtamin D	Astronathin	Lutein	Citicoline		Nuththan	Curcumin' Turmento					Protein Posedor		No otropics	Artioxidants	Choline	-
Total	N=3345	N=3367	N=2677	N=3078	N+2290	N=3510	N=1984	N=2498	N=1807	N+2026	N+3458	N=3077	N+3306	N+2765	N+3302	N+3525	N+3265	N+2230	N=1925	N+3258	N+2134	N=1
Brand provides valid contact information on the label (phone/email/website)	22%	23%	24%	23%	24%	23%	24%	24%	26%	24%	22%	23%	23%	24%	23%	22%	23%	24%	26%	23%	24%	25
Country of origin	21%	21%	22%	22%	22%	21%	23%	22%	24%	23%	21%	22%	22%	22%	21%	21%	21%	23%	23%	21%	23%	2:
wetste	_	_	_		_	_	_	-		_	_	_	-	-	_		_	_	-	_	_	⊢
Access to a Certificate of Analysis and/or proof of product testing provided	29%	30%	31%	31%	31%	29%	36%	34%	33%	34%	30%	30%	31%	31%	29%	30%	31%	32%	34%	30%	33%	3-
Ingredient supplier information is readily available	28%	28%	30%	29%	31%	27%	32%	30%	31%	31%	28%	28%	20%	29%	20%	20%	29%	30%	30%	20%	30%	3
Contract manufacturing information on label or website	16%	16%	10%	17%	17%	16%	19%	17%	20%	19%	16%	16%	16%	17%	16%	16%	17%	10%	19%	16%	10%	1
irand has a quality seal on the label	32%	32%	32%	32%	32%	32%	32%	32%	33%	32%	32%	32%	32%	32%	31%	31%	33%	32%	33%	32%	32%	3
Label claims are believable and have elerences to back them up on the website	25%	25%	26%	26%	26%	24%	28%	27%	27%	20%	25%	25%	25%	26%	24%	25%	25%	26%	27%	25%	20%	2
The ingredient information is detailed on the label, packaging or website	42%	42%	41%	42%	41%	41%	40%	41%	39%	40%	41%	42%	42%	41%	42%	41%	42%	40%	40%	42%	42%	41

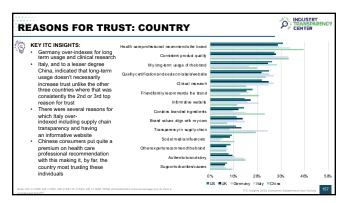


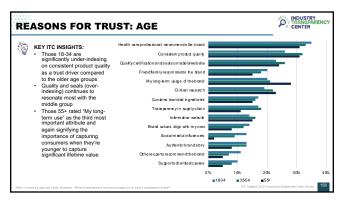


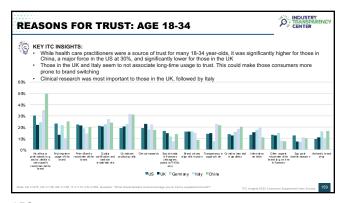


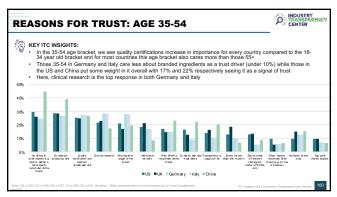


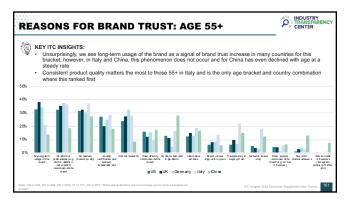


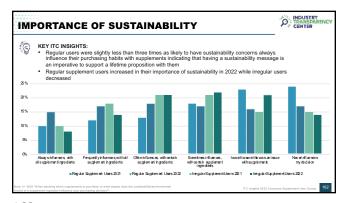


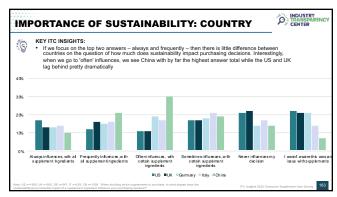


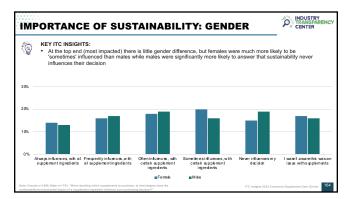


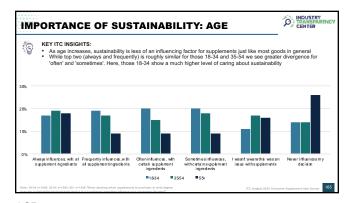


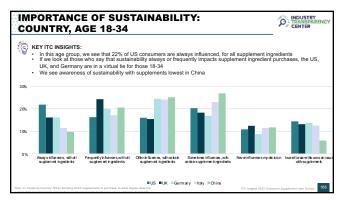


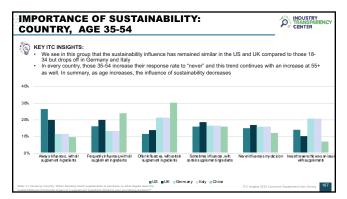


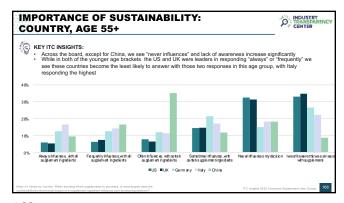












TRENDS OVERVIEW: OPPORTUNITIES AND INSIGHTS

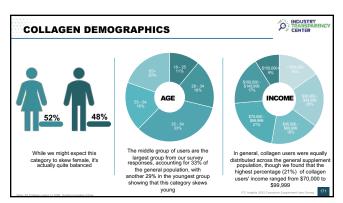
supplements which do focus on sustainability that are aimed at the 35-54 year oid mander.

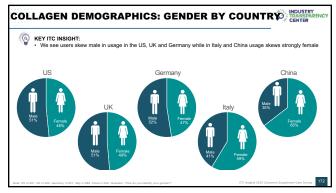
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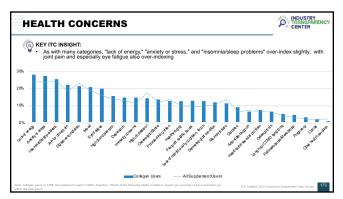


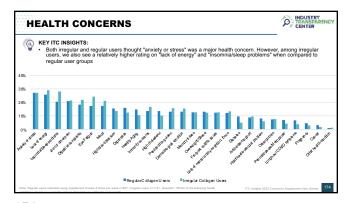
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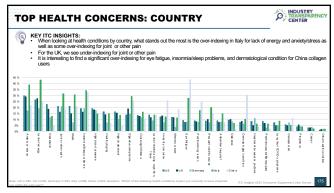


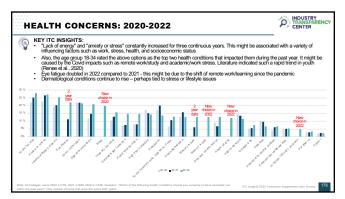




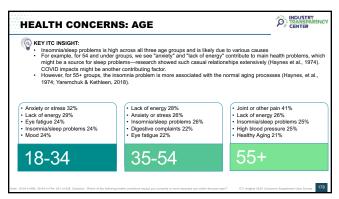


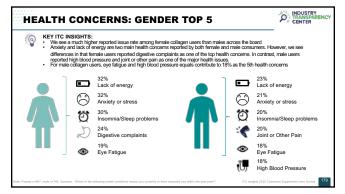


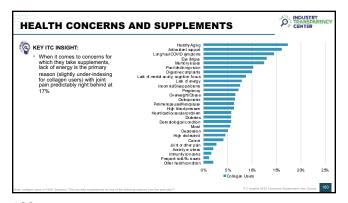


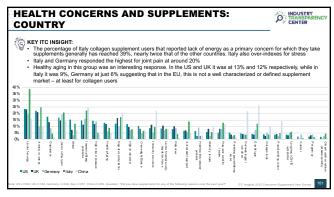


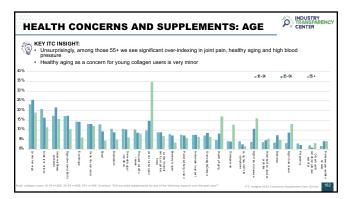
	first appears as one of the with remote work/learning	top 5 health concerns from 2 due to Covid 19 the low 20's, down from 30%		ective – likely a strong
High blood pressure 30% Jaint/other pain 30% High cholesterol 28%	Anxiety/stress 30% High blood pressure 26% Joint/ other pain 25%	High blood pressure 24% High cholesterol 22% Aroiety/stress 21%	High blood pressure 25% Anxiety/stress 24% Joint/other pain 24%	Lack of energy 28% Considerate and Amoiety/stress 27% Insormals/sleep problems 25%
Anxiety/stress 26%	High cholesterol 24%	Joint/ other pain 21%		Eye Fatigue 22%
Lack of energy 25% Overweight/ obese 25%	Lack of energy 24%	Insomnial sleep problems 16%		Joint or other pain 21%

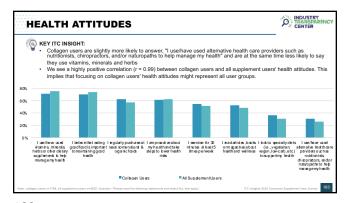


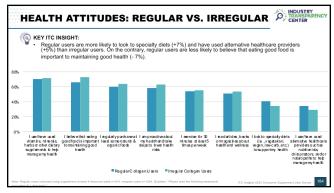


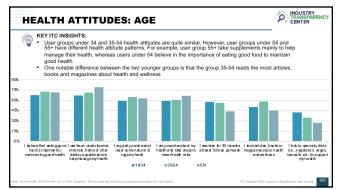


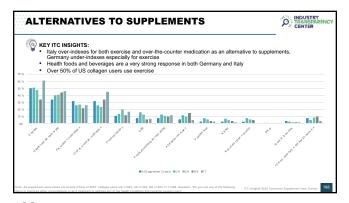


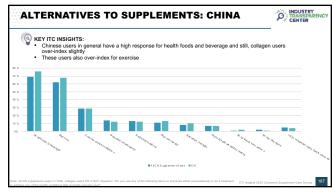


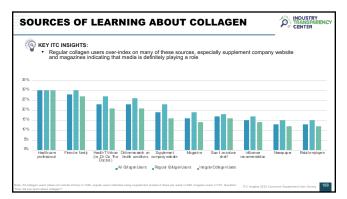


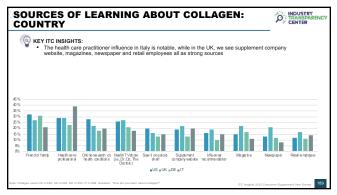


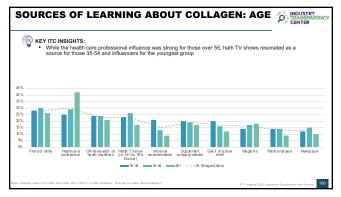


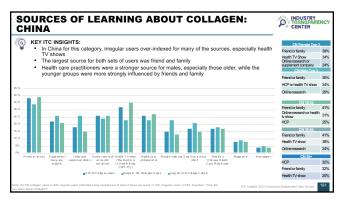




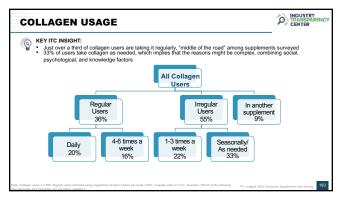


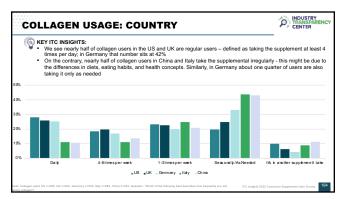




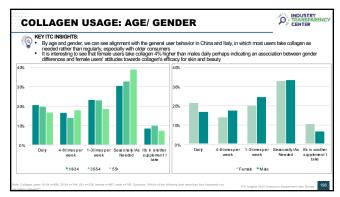


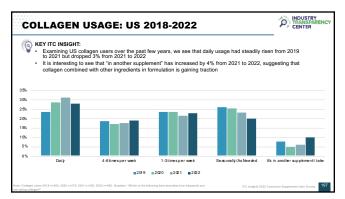


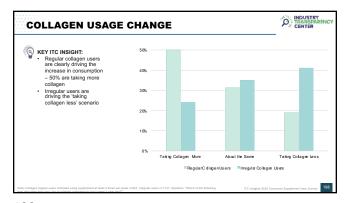


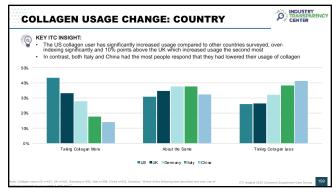


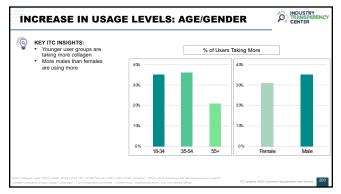
KEY ITC INSIGHTS: We saw an increase ir Users taking collagen	n collagen users using more in more in the UK is the same a	reported in the US from 2021 t as last year's usage change, w	o 2022, with a 13% increase ith 33%
2021.	-		k collagen more in 2022 than in +17%, the UK at +7% and Germ
	US 2021 US 2022	UK UK 2021 2022	Germany Germany 2021 2022
Taking Collagen More	30% 43%	33% 33%	35% 28%
About the Same	44% 31%	42% 35%	44% 38%
Taking Collagen Less	22% 26%	20% 26%	20% 41%

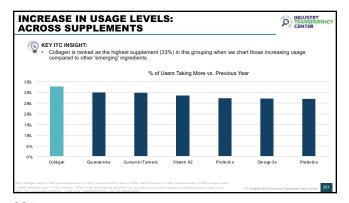


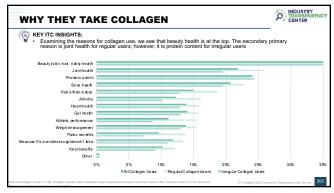


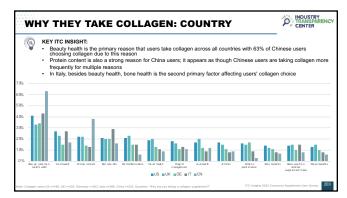


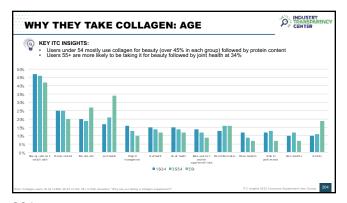


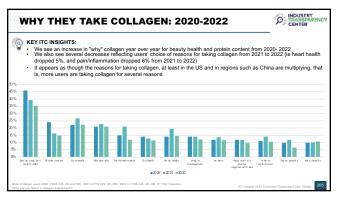




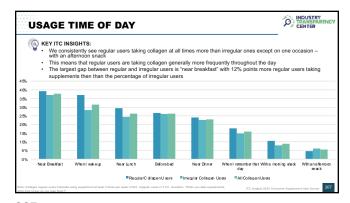


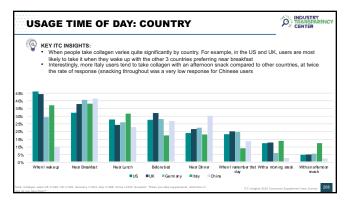


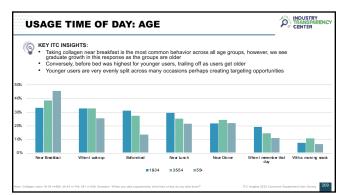




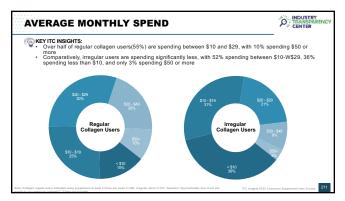
We saw declines near with joint health declin In both the US and Uk 2022 Gut health has increase	c, protein cont	ent is increasing	significantly at +	t decline cominç 5% in the US ar	j in 'pain/inflamma nd +4% in the UK	ation' at 11%, from 2021 to
	US	US	UK	UK	Germany	Germany
	2021	2022	2021	2022	2021	2022
Beauty (skin, hair, nails) health	40% 1	41%	34%	33%	42%	34%
Joint health	30%	27%	24%	23%	24%	15%
Protein content	17%	22%	17%	22%	14%	14%
Bone health	22%	21%	18%	20%	28%	20%
Pain/inflammation	19%	21%	19%	23%	26%	15%
Heart health	18%	19%	20%	20%	20%	13%
Weight management	15%	18%	14%	16%	13%	11%
Gut health	13% 1	17%	13%	20%	13%	12%
Arthritis	13% 4	17%	13%	15%	15%	11%

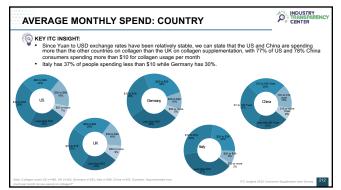


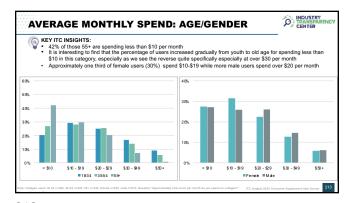


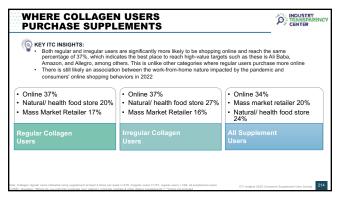


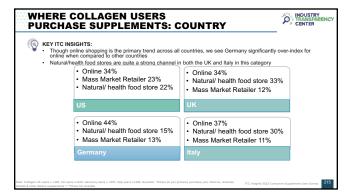


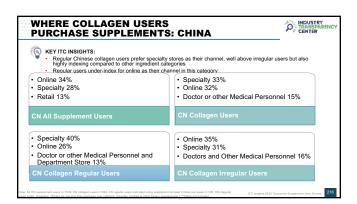


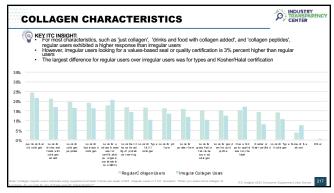


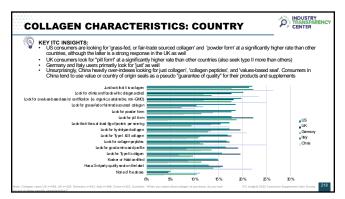


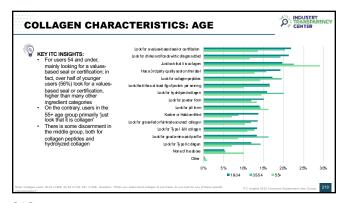


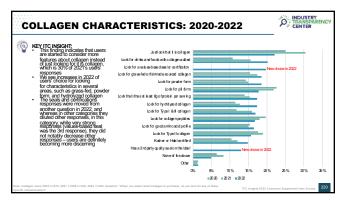




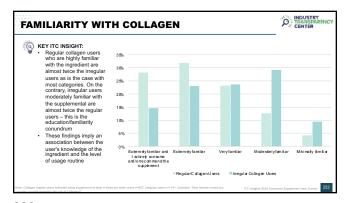


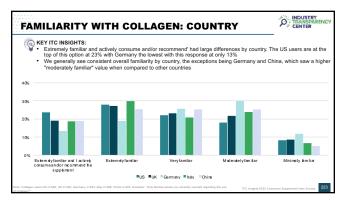


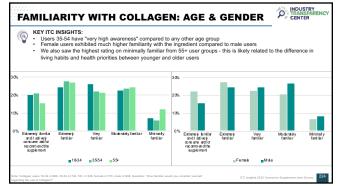


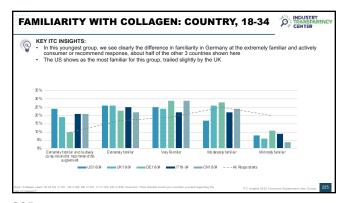


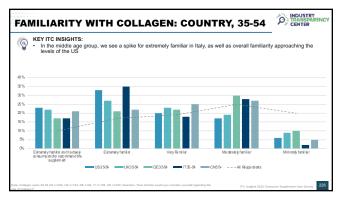


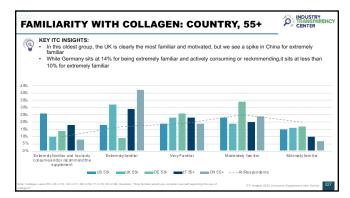


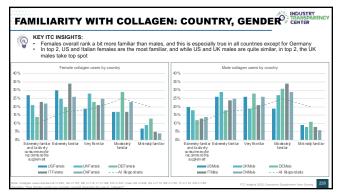


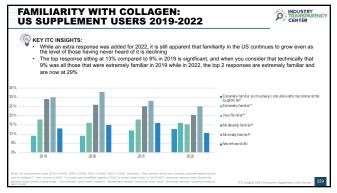


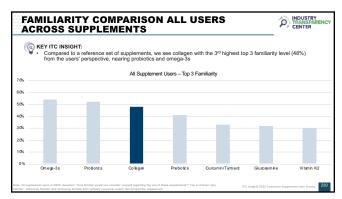


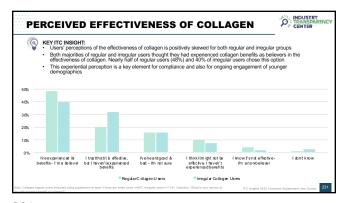


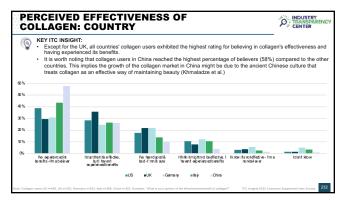


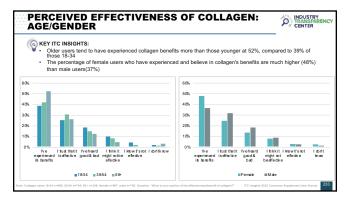


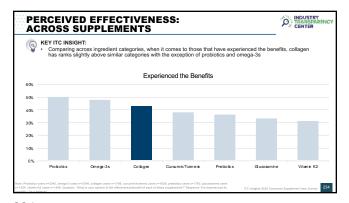


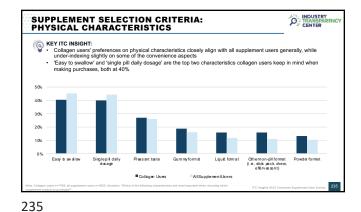


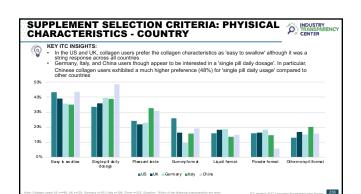


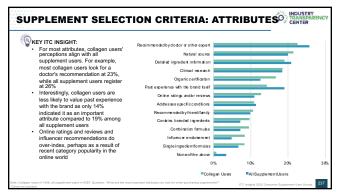


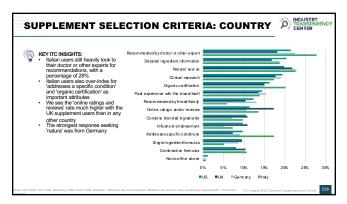


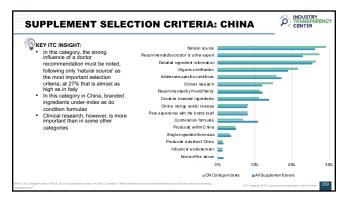




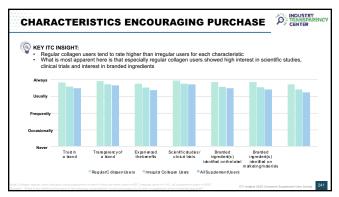


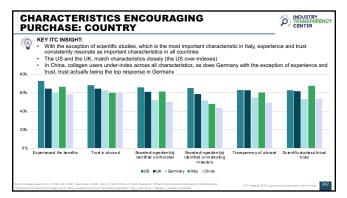




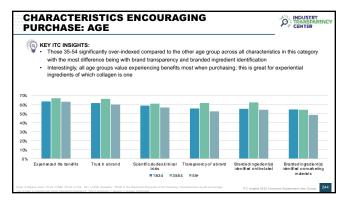


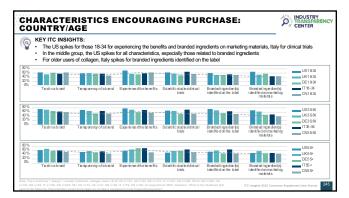
KEY ITC INSIGHT: Natural source as a criterior In fact, many criteria are dei (-8% in Germany) and addn 6% in the US Part of the analysis here is I effect on any specific respon	creasing in böth esses specific co hat fewer users	the UK and Germa onditions (-8% in the are choosing multi	any, including clinica ne UK but up 2% in ible criteria. but also	Germany); address	es specific condition	ns is also down
	US 2021	US 2022	UK 2021	UK 2022	DE 2021	DE 2022
Natural source	17%	20%	27%	22%	28%	23%
Detailed ingredient information	19%	20%	18%	17%	27%	19%
Clinical research	16% 1	19%	23%	18%	24%	19%
Recommended by doctor or other expert	24%	21%	20%	18%	24%	23%
Recommended by friend/family	12%	12%	10%	10%	15%	13%
Contains branded ingredients	10%	11%	11%	11%	7% •	7%
Single ingredient formulas	8%	9%	6%	10%	11%	9%
Addresses specific conditions	16%	10%	15%	7%	7%	9%
Combination formulas	6%	8%	6%	10%	7% 4	10%

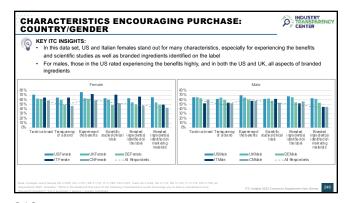




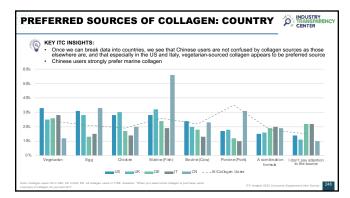
KEY ITC INSIGHTS: As a characteristic encouragir In fact, all listed characteristic Branded ingredients on front of The strength in the UK and G All numbers were consistent of	s are up in the UK, of label and on mar ermany suggests n	with both transparen keting material in ger	cy and branded ingred neral were both up 10%	ents on front of label in Germany	up 12%	
	US 2021	US 2022	UK 2021	UK 2022	Germany 2021	Germany 2022
Trust In Brand	70%	68%	55%	65%	48%	63%
Transparency of a Brand	65%	63%	51%	63%	49%	55%
Experienced the Benefits	72%	73%	59%	65%	58%	60%
Scientific Studies/Clinical Trials	64%	63%	58%	62%	53% •	→ 53%
Branded Ingredients Front of Label	62% 1	66%	49%	61%	42%	52%
Branded Ingredients on Marketing	59%	65%	49%	59%	42%	52%

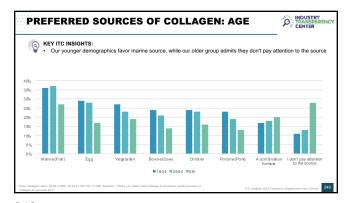


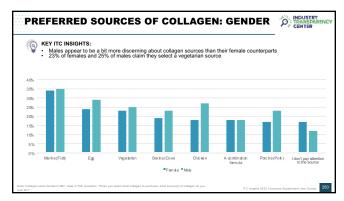


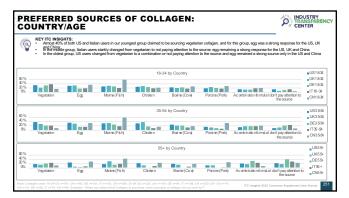


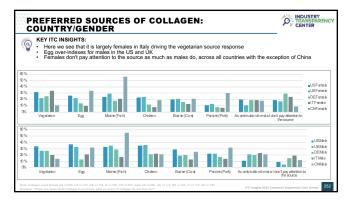
(a) KEY I	TC INSIGHTS	:						
 We continue to see a variety of sources in our response, including even vegetarian, but marine is at the top for both regular and irregular users followed by ge. Once we get to the third response our user group diverge, with regular users moving to chicken and irregular users choosing vegetarian 								
	Marine	() Egg	Chicken	Vegetarian	Bovine (cow)	Porcine (Pork)	A combo formula	I don't pay attention to source
Regular Collagen Users	35%	31%	28%	27%	27%	22%	16%	12%
Irregular Collagen Users	34%	24%	19%	22%	17%	18%	19%	16%
All Collagen	35%	26%	22%	24%	21%	19%	18%	15%

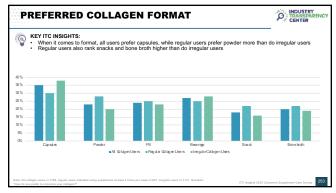




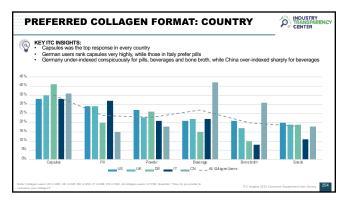


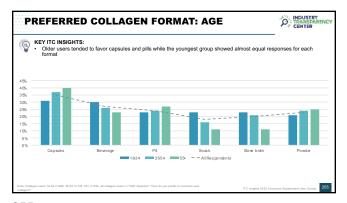


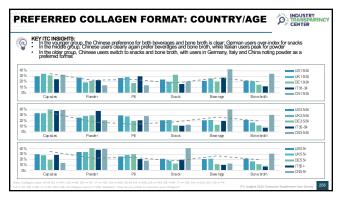


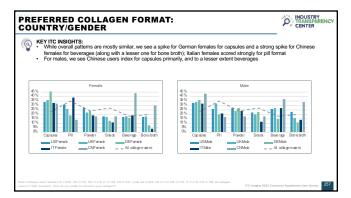




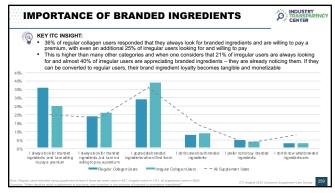


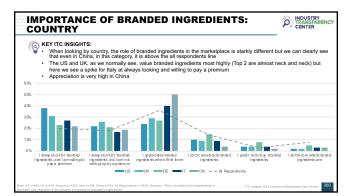


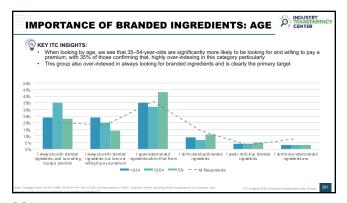


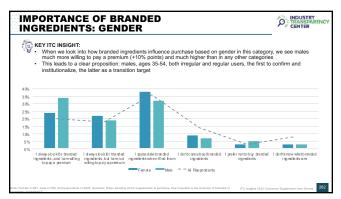


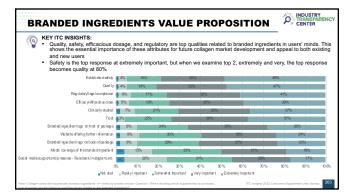












BRANDE	INGREDIE	NTS	V	ALUE PROP	osi	TION PINDUSTRY TRANSPARENCY
	the top-5 between regular					e order. But a gap starts to open anded ingredients very highly nt attributes
	Regular Collagen Users			Irregular Collagen Users		
	Quality	84%		Quality	82%	
	Established safety	83%		Established safety	79%	
	Efficacy/efficacious dose	82%		Efficacy/efficacious dose	77%	
	Trust	81%		Trust	76%	
	Regulatory/legal compliance	78%		Regulatory/legal compliance	75%	
Note: All collagen users that appreciate bra- inscortant are the following qualificative asset	nded ingredients in varies by answer choic	e. Question: 'W	Then deck	ling which supplements to purchase, how		ITC Insights 2022 Consumer Supplement User Survey 264

