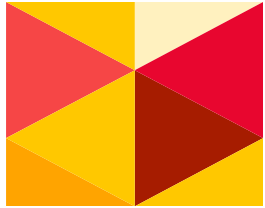




**2019 2nd Annual Single
Ingredient Trade Association
Consumer Survey
#TTC2019ConsumerInsights**



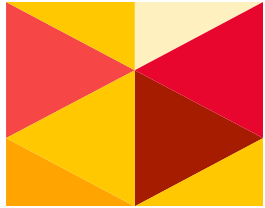
Study Citation



You may use the information from this survey in internal and external materials. Please use the below citation when referring to data from this study:

Trust Transparency Center. (2019). 2019 2nd annual Trust Transparency Center Single Ingredient Trade Association Consumer Survey

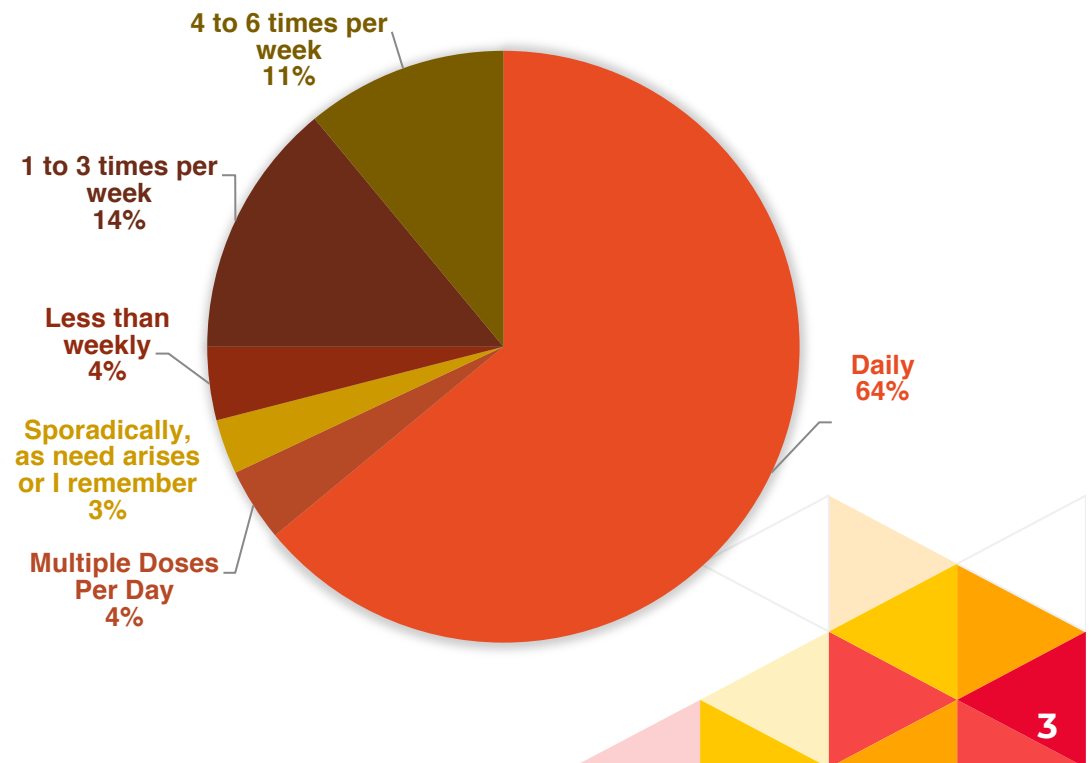




Survey Overview

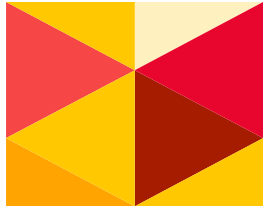
- Fielded in July 2019
 - Written & analyzed by Carla Ooyen, Ooyen Research, LLC
 - Fielded online by Dynata (formerly Research Now)
- Survey of 1,003 consumers
 - Disqualified poor quality responses and respondents who did not fit survey consumer profile parameters
- General Criteria for Participation
 - Supplement users, with sporadic users no more than 5% of sample

SUPPLEMENT USAGE





Who are these Consumers?

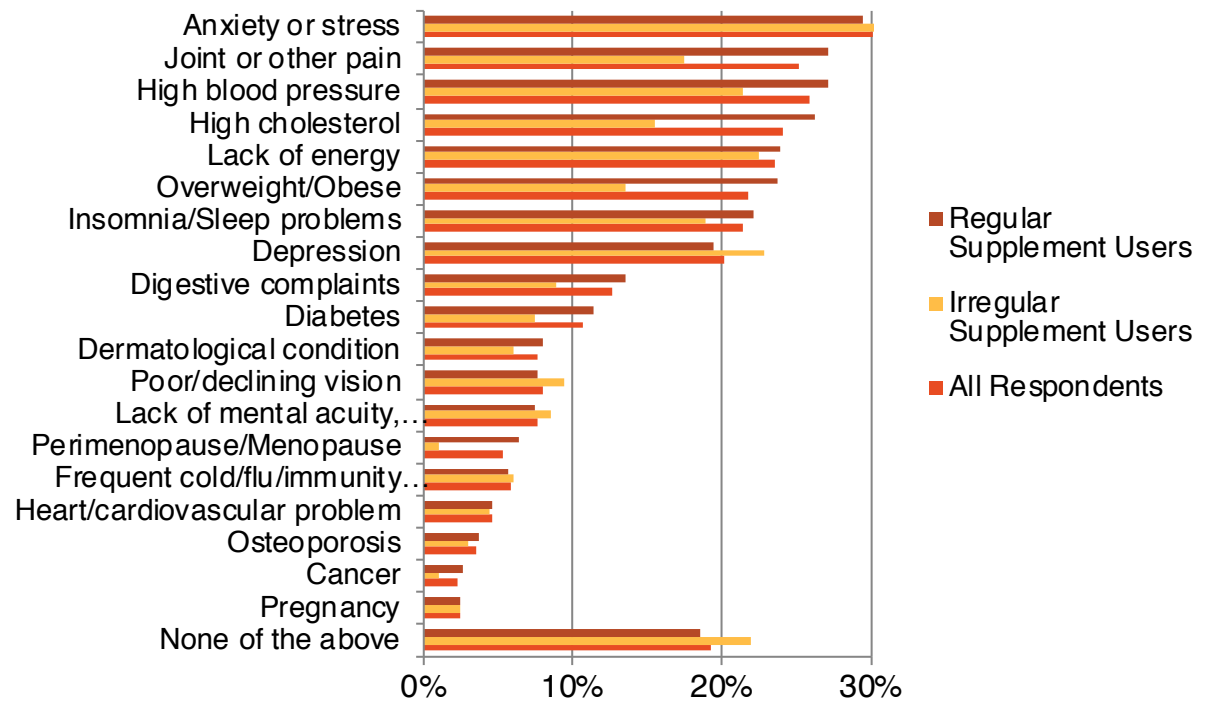


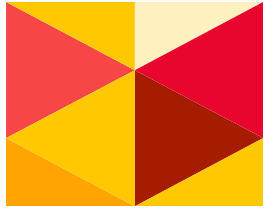
They have a variety of health issues



- ▶ Top 4 concerns remain the same year-over-year, though Anxiety or Stress rose to #1 concern (from #4 in 2018)
- ▶ Regular Supplement Users are more likely to be suffering from obvious health problems like pain, high blood pressure, and high cholesterol

Health Issues in Last Year

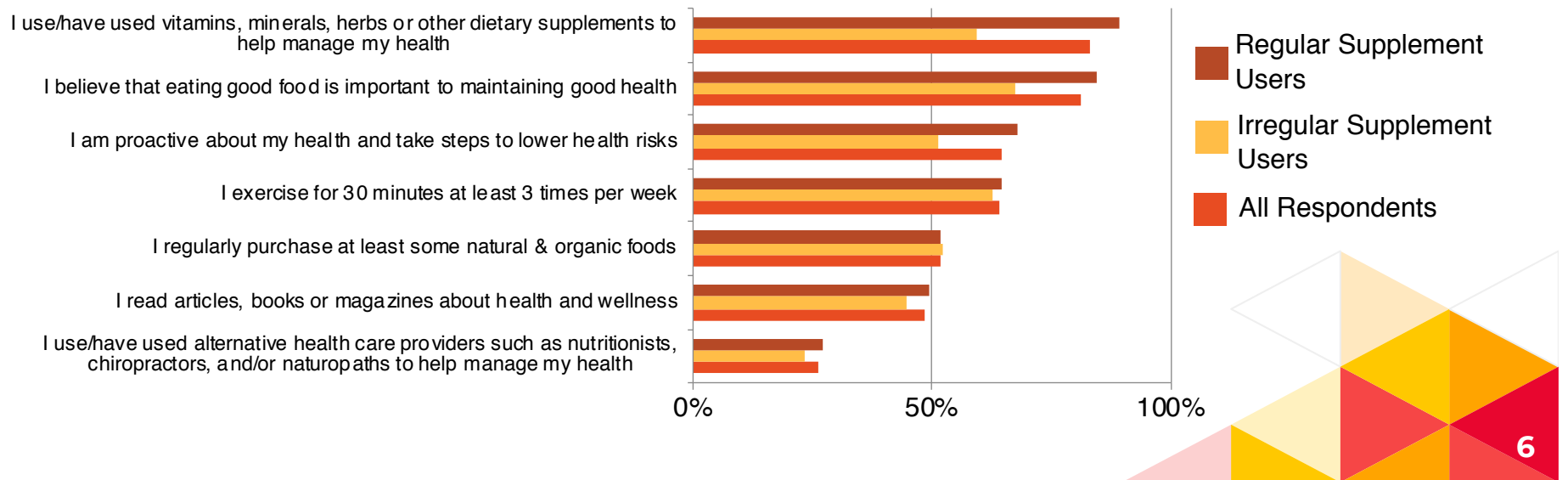


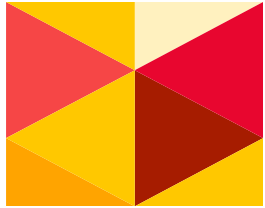


Health Attitudes

- ▶ They are using supplements & other means to better manage their health
- ▶ The relative ranking of these health attitudes remained consistent year-over-year
- ▶ Taking supplements, eating good food, and being proactive about health are most important to Regular Supplement Users

Health Attitudes

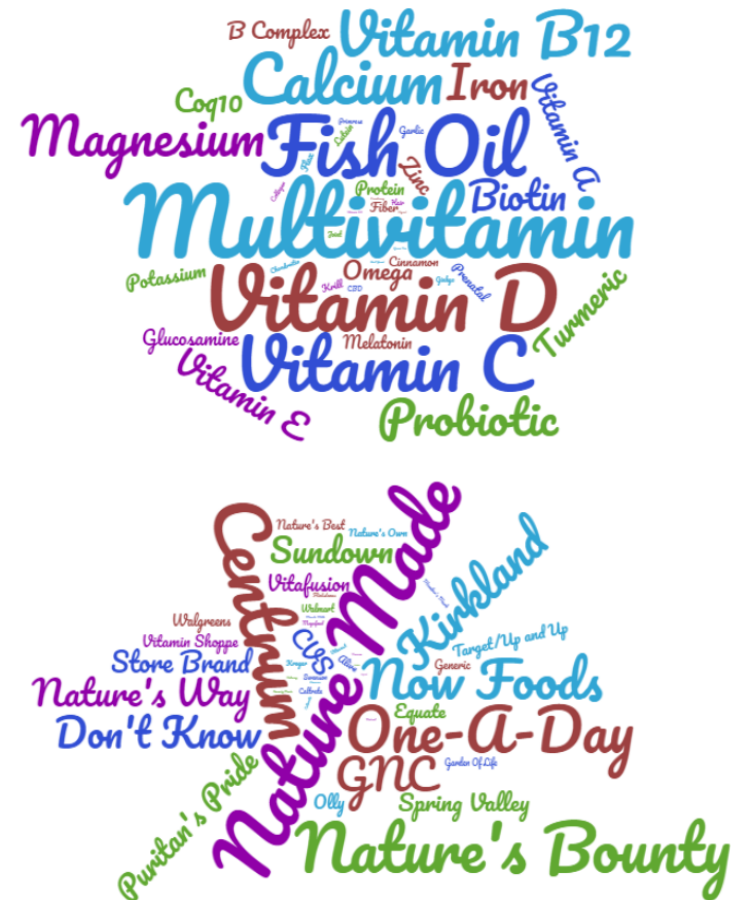




Supplement Purchases

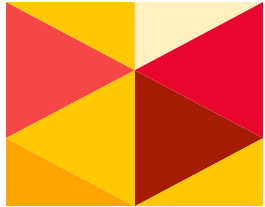


- ▶ They are purchasing a wide range of supplements and brands
- ▶ Most cited supplements (multivitamins, vitamin D, and fish oil) are top of mind for both Regular & Irregular Supplement Users
- ▶ They are purchasing a wide range of brands, including private label, but they may not be very loyal to a particular brand
- ▶ Regular Users are more aware of the brands they are using
- ▶ Nature Made was most cited by Regular Users while Centrum was cited more by Irregular Users



Note: Unaided list of supplements they are taking and unaided list of brands they purchase

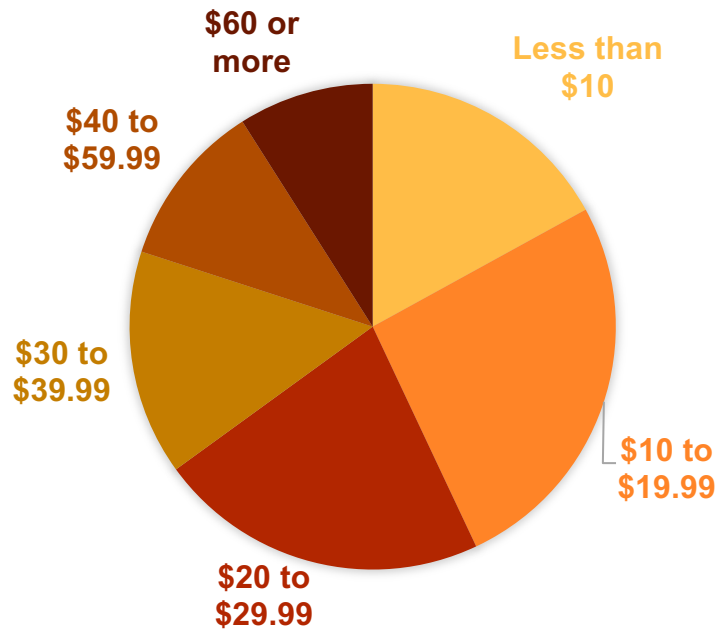




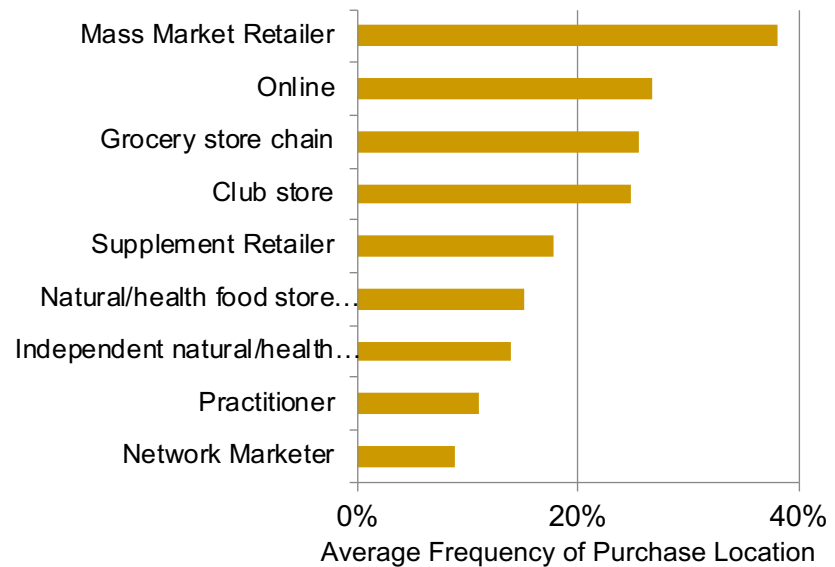
Spending Habits

- They have a wide range of spending on these supplements, and they are purchasing them in many different locations

Individual Monthly Supplement Spend



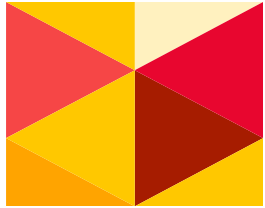
Relative Popularity of Purchase Location





General Findings

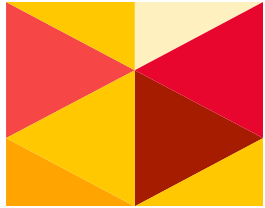




General Findings

- ▶ Consumers at all usage levels need to be better educated about what they don't know
- ▶ Wide ranging press and consumer education can quickly raise the bar on supplement awareness, knowledge, and usage
 - ▶ Vitamin D is highlighted as a prime example
 - ▶ Curcumin/Turmeric is well down this path, but needs a boost to finalize the journey
- ▶ Regular Users can serve as prime examples of how education and experience leads to loyal customers
 - ▶ Strong correlation between supplement knowledge, experience of benefits and usage levels – feeling is believing
- ▶ It is important that usage is increased in conjunction with education in order to better ensure long term usage

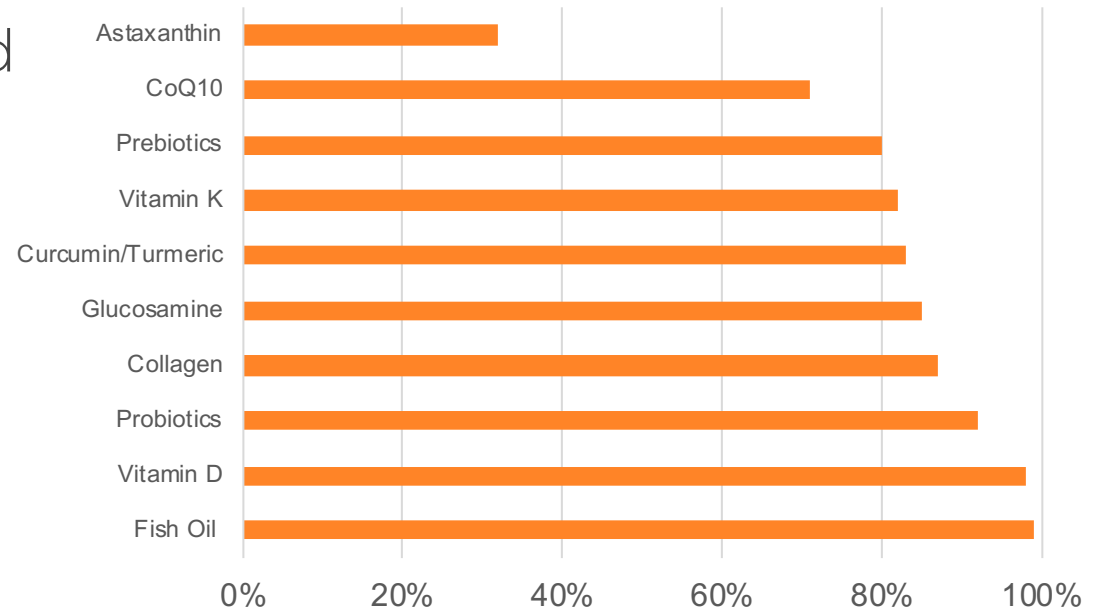




Familiarity with Usage

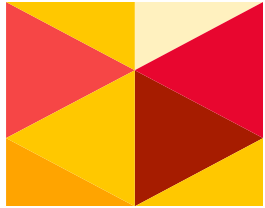
- ▶ Fish Oil, Vitamin D and Probiotics have reached nearly full awareness among supplement users
- ▶ CoQ10 also remains in the position of needing to improve general knowledge of its existence

Percentage of respondents who have heard of supplement



■ % who have heard of





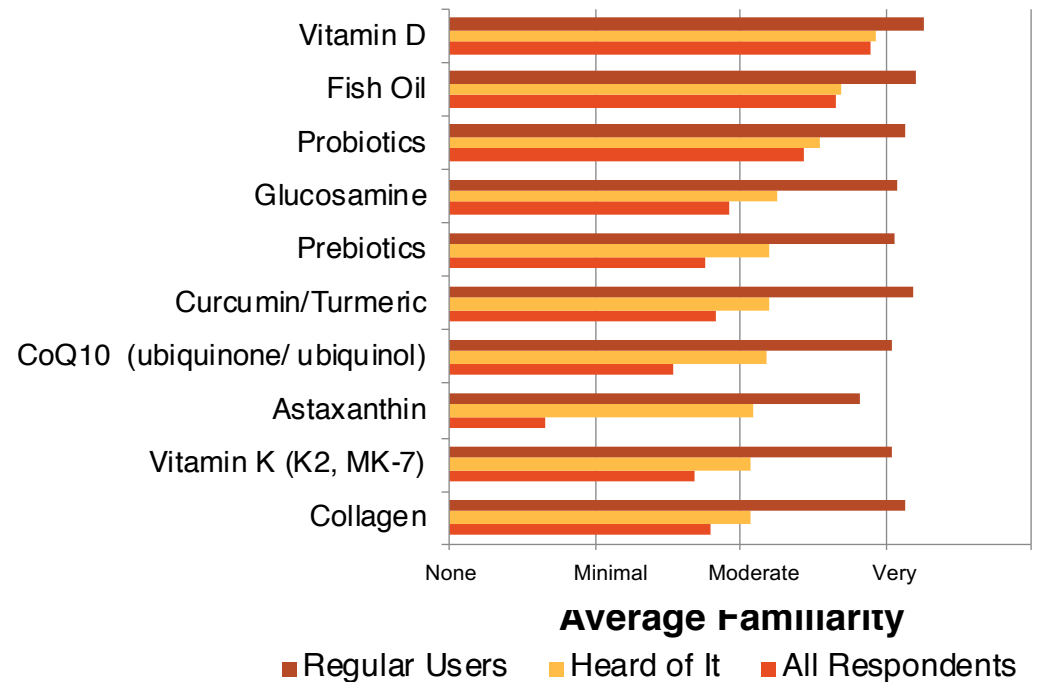
Familiarity with Usage

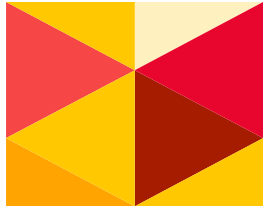


- While many consumers have never heard of supplements like Astaxanthin, those who have generally feel they have at least moderate familiarity
- Regular Users of a particular supplement are generally confident in their knowledge – even if they don't know everything they should/could
- Familiarity levels were slightly up for the average users compared to last year
- Glucosamine is well positioned with regard to supplement familiarity

Note: Regular Users indicated using supplement at least 4 times per week

Relative Familiarity of Usage



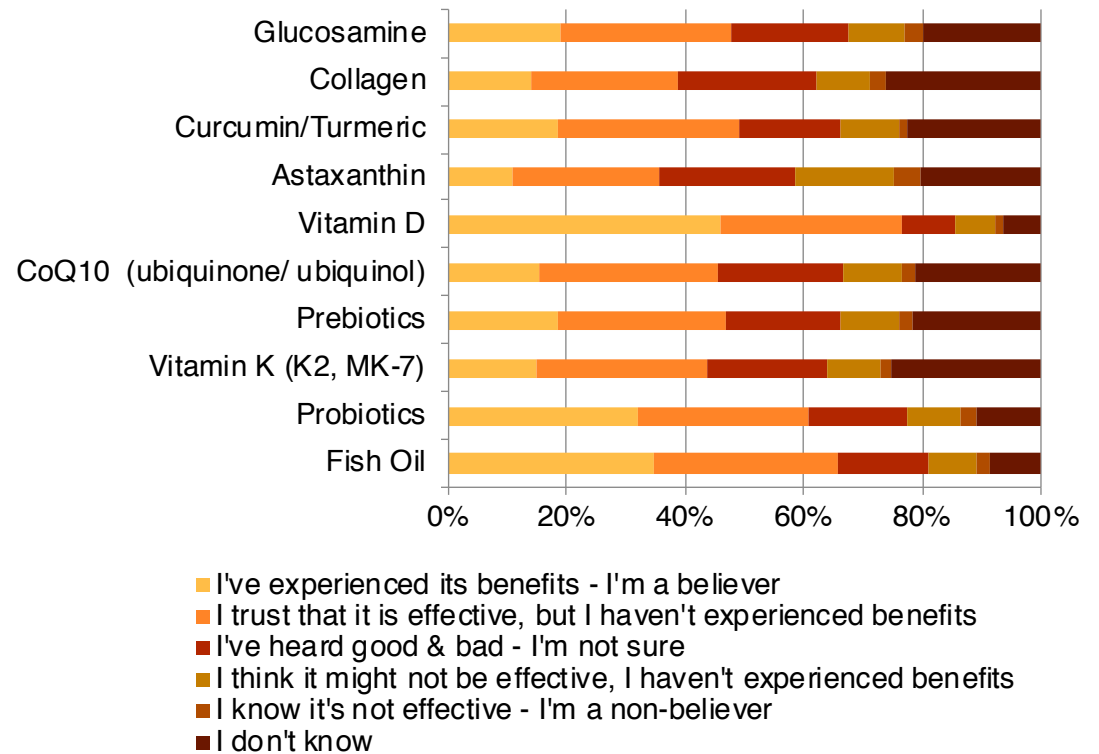


Perceived Effectiveness

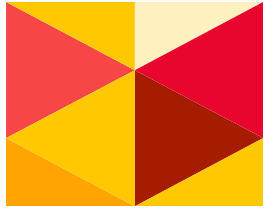


- ▶ A large swath of supplement users have questions or concerns regarding the effectiveness of various supplements
- ▶ Glucosamine falls behind only Fish oil, Vitamin D and omega-3s in total perceived effectiveness
- ▶ Vitamin D highlights how quickly a **STRONG CONSUMER EDUCATION CAMPAIGN** can quickly elevate consumer understanding

Perceived Effectiveness



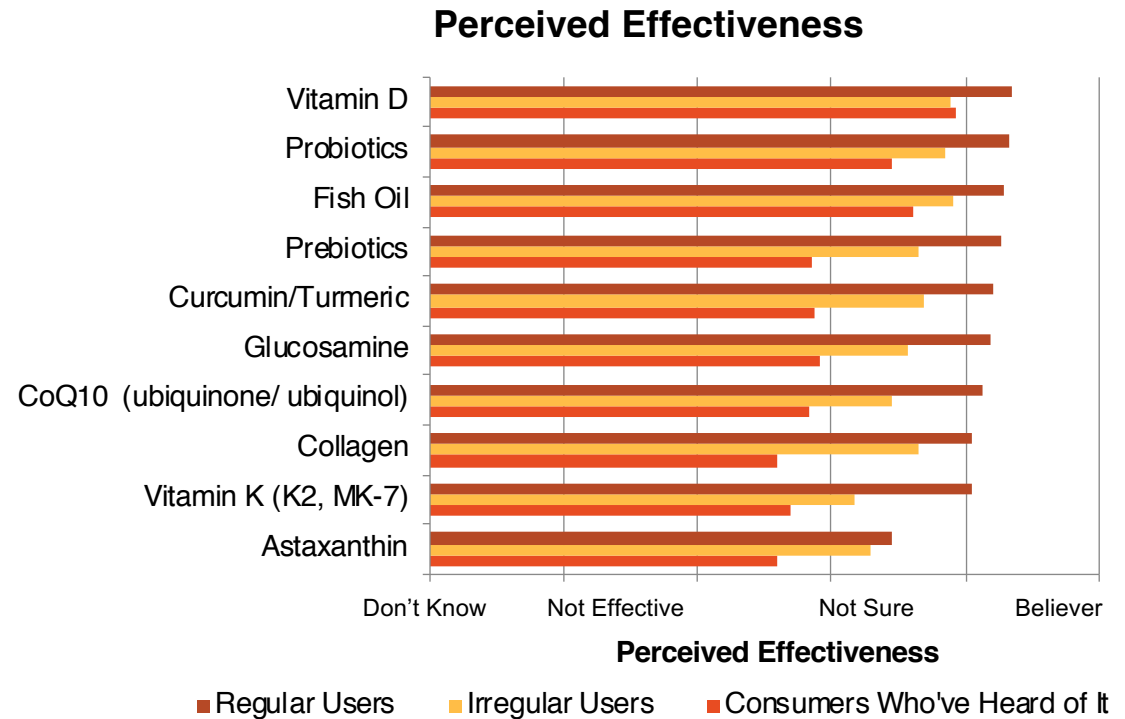
Note: Only consumers who had heard of the supplement answered this question for each specific supplement



Perceived Effectiveness

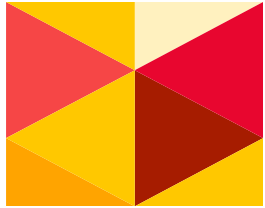


- Regular Users are far more convinced of all supplement's effectiveness
- Irregular Users continue to be more likely to be trusting in effectiveness rather than having experienced benefits
- Consumers need to be EDUCATED on the DOSAGES required to experience benefits



Note: Regular Users indicated using supplement at least 4 times per week



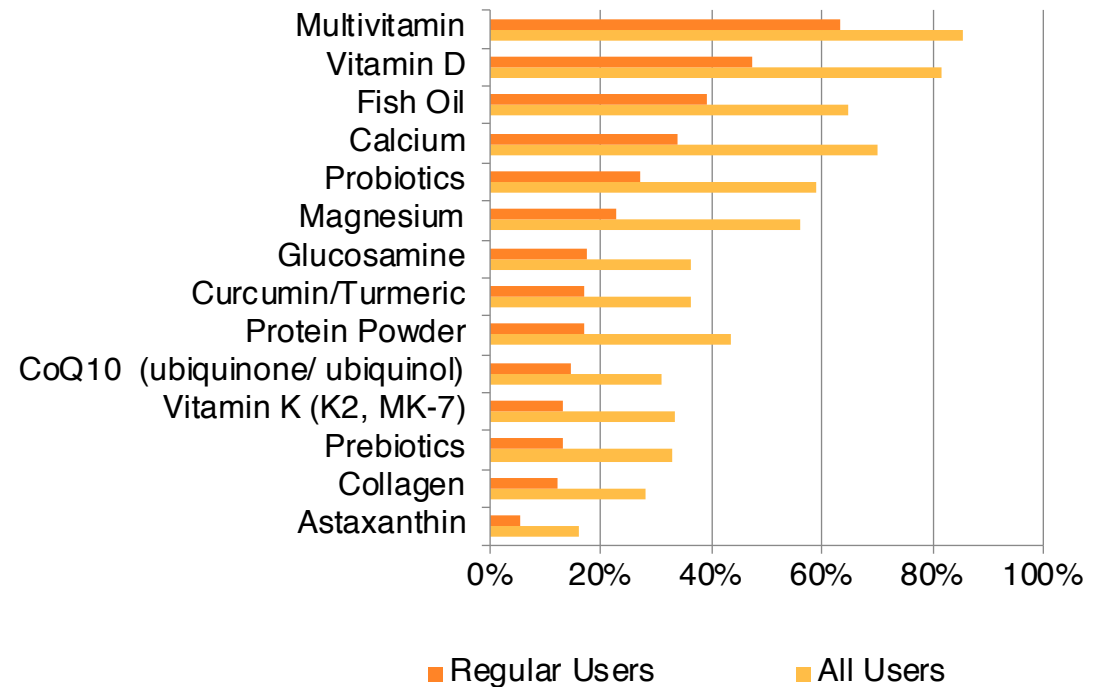


Usage Levels



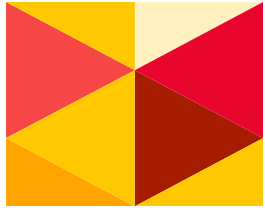
- ◀ Multivitamins continue to be the #1 supplement choice
- ◀ Vitamin D has taken the market by storm over the last decade with usage levels almost as strong as multivitamins
- ◀ The 7 single ingredient supplements that are the study focus continue to be used by a small but important market segment

Percentage Usage of Each Supplement



Note: Regular Users indicated using supplement at least 4 times per week

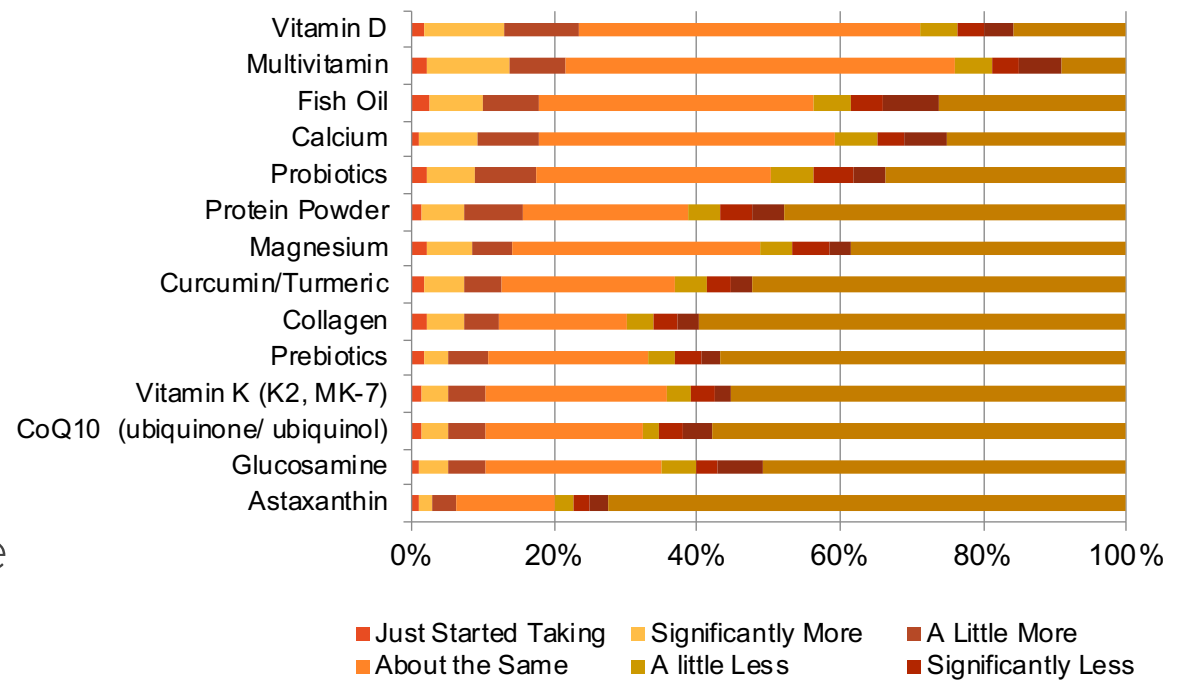


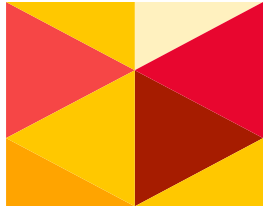


Change In Usage Levels

- Consumers continue to increase usage of all supplement types, even mainstays like multivitamins and calcium as well as the relatively newly ubiquitous Vitamin D
- Usage levels of lesser-known supplements are slowly on the rise as well

Change in Usage of Each Supplement

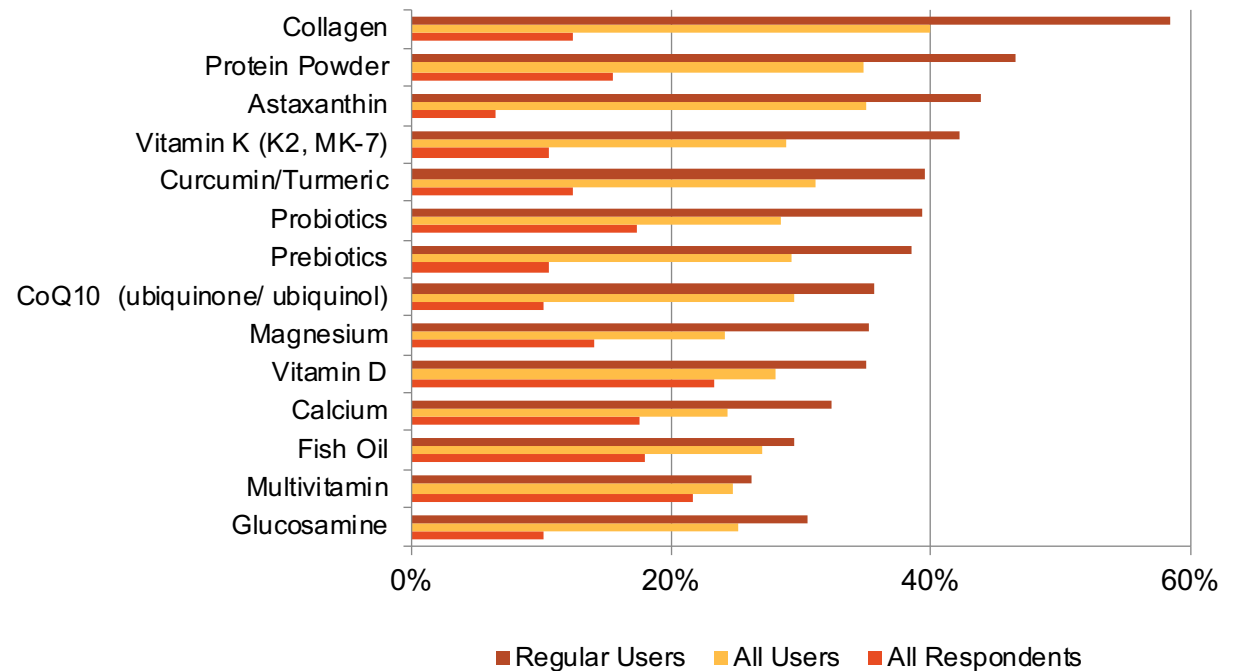




Change In Usage Levels

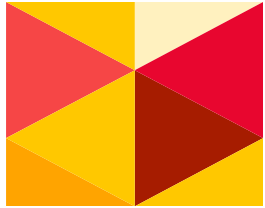
- ▶ Collagen and Protein Powder are the supplements experiencing the most increase in usage, especially with Regular Users
- ▶ Usage levels are remaining steadier for supplements like Multivitamins and Glucosamine that have more established user bases

Percentage Using More



Note: Regular Users indicated using supplement at least 4 times per week



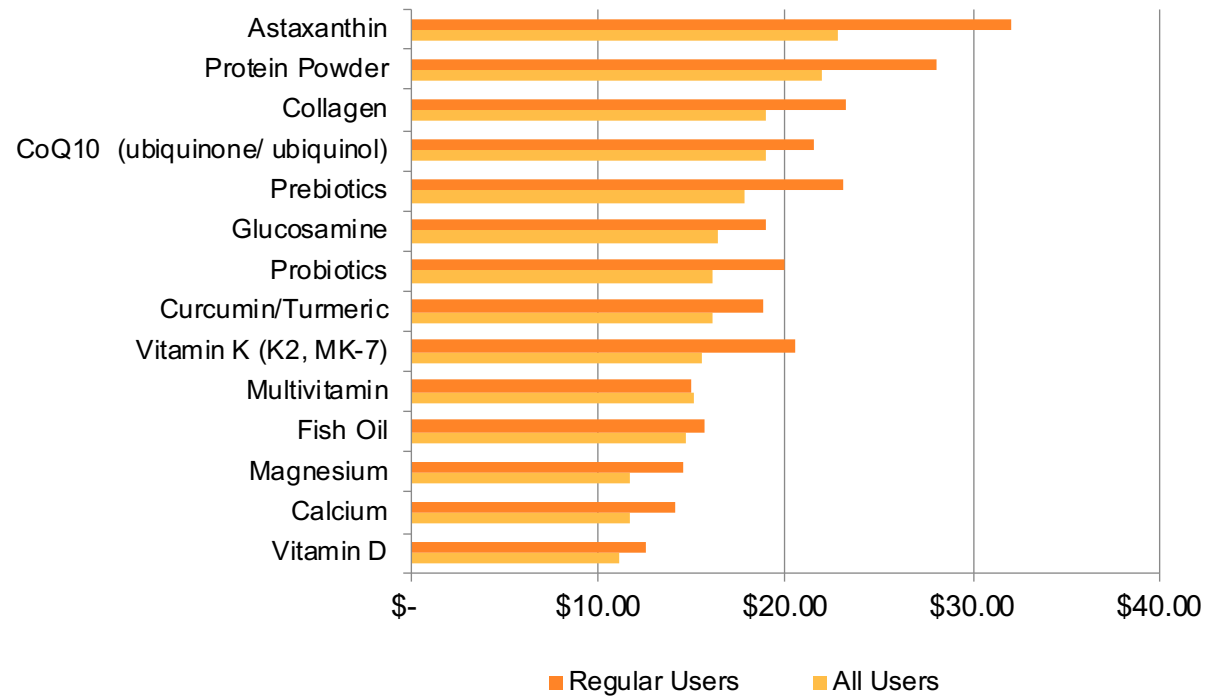


Average Monthly Spend



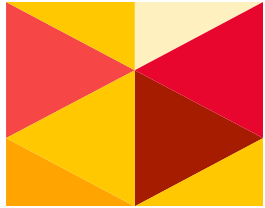
- ▶ Regular Users tend to spend more per month on supplements
- ▶ Average monthly spend was up compared to last year

Average Monthly Spend of Users



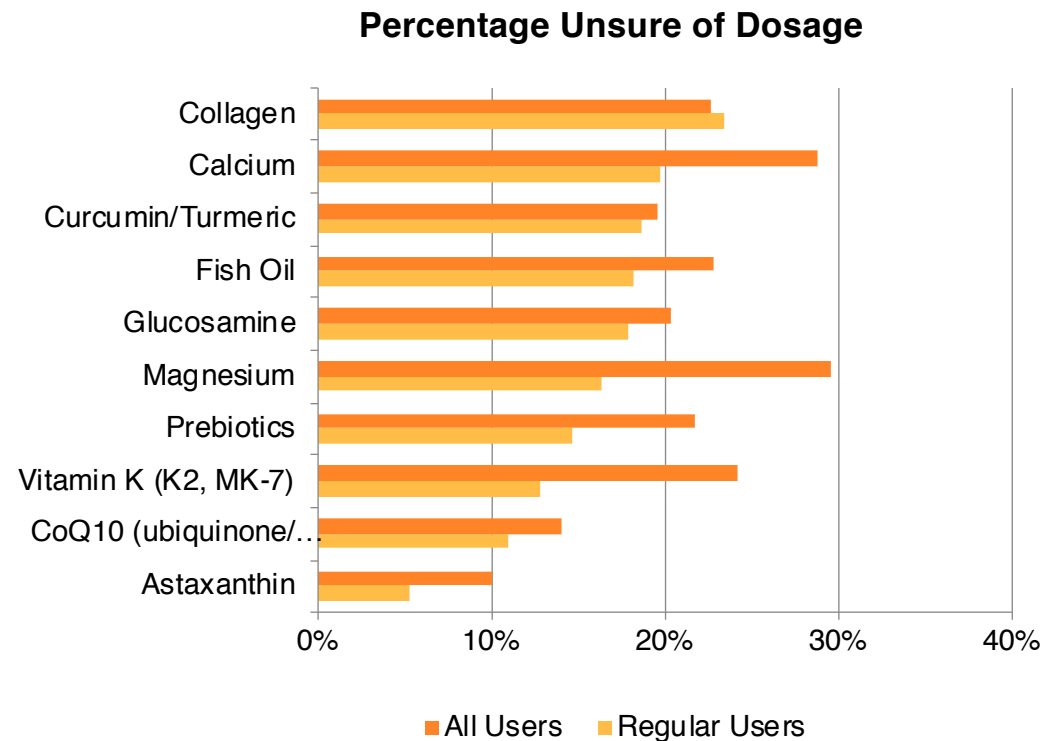
Note: Regular Users indicated using supplement at least 4 times per week





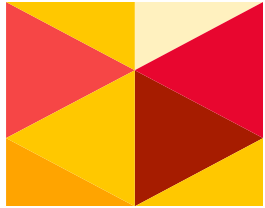
Knowledge of Dosage Levels

- ▶ There is a significant segment of supplement users that aren't paying attention to dosages
- ▶ Regular Users are significantly more likely to be familiar with dosages
- ▶ Consumers appear to have less dosage knowledge for supplements that are often paired with other ingredients
- ▶ Consumers need better EDUCATION regarding effective dosages to be informed when choosing supplements



Note: Regular Users indicated using supplement at least 4 times per week

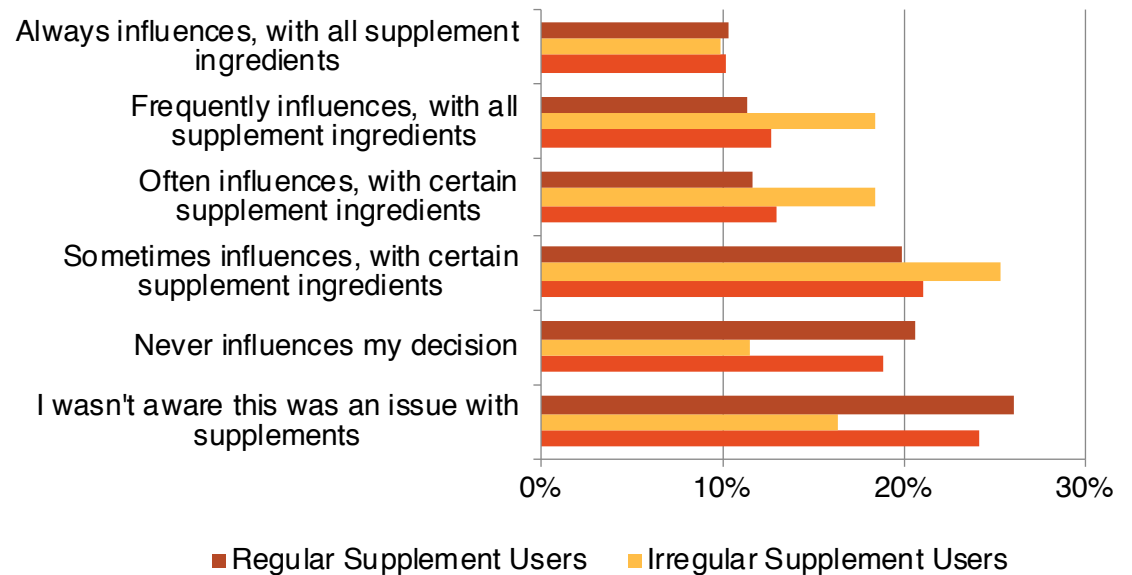




Importance of Sustainability

- Overall, sustainability isn't an important consideration for the majority of supplement users
- Consumers for whom Sustainability is frequently or always an influence are:
 - Younger (69% under 46 vs. 50% overall)
 - More ethnically diverse (47% white, not Hispanic vs. 62% overall)
 - Regularly purchase natural and organic foods (65% vs. 52%)
 - Less likely to currently say that they have used VMS products to manage their health (77% vs. 83%)
 - More likely to have used alternative health care (35% vs. 26%)

Sustainability/Environmental Impact Importance



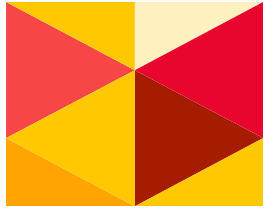
Note: Regular Users indicated using supplement at least 4 times per week





CoQ10 Information

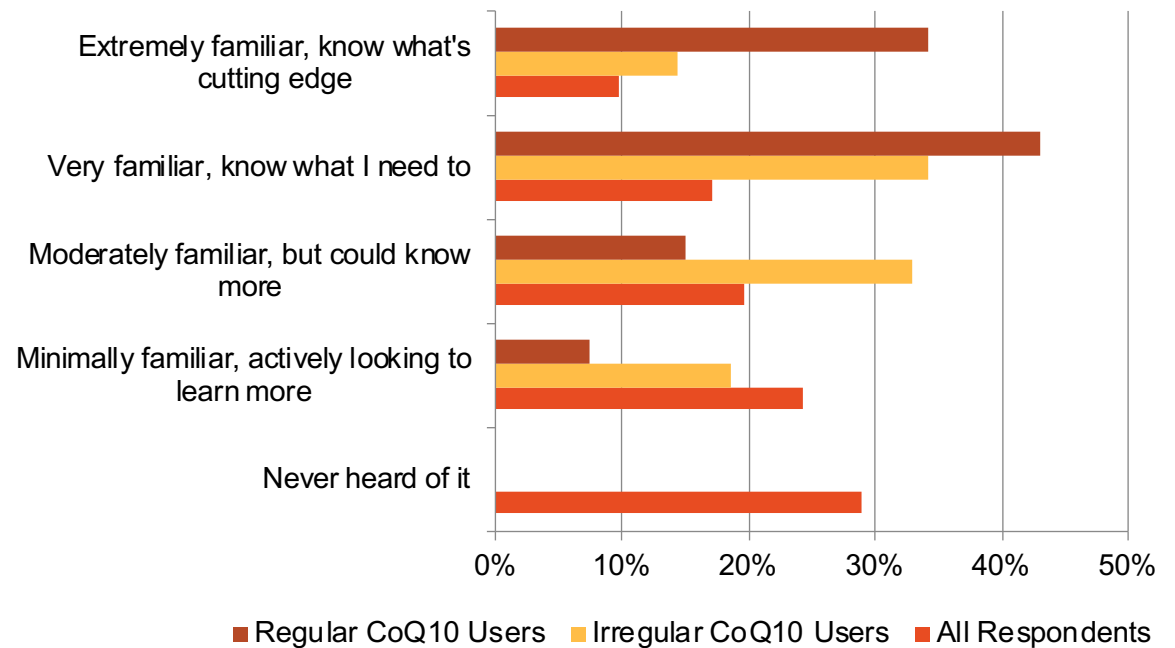




Familiarity with CoQ10

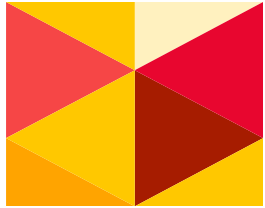
- ▶ Over two thirds of supplement users have heard of CoQ10
- ▶ While most Regular Users are very or extremely familiar with its usage, most Irregular Users continue to need more education
- ▶ Consumers surveyed this year appear to be only slightly better informed than last year, with Regular Users averaging a higher level of self-described understanding

Familiarity with CoQ10



Note: Regular Users indicated using supplement at least 4 times per week. N=146 for CoQ10 Regular Users, N=167 for CoQ10 Irregular Users



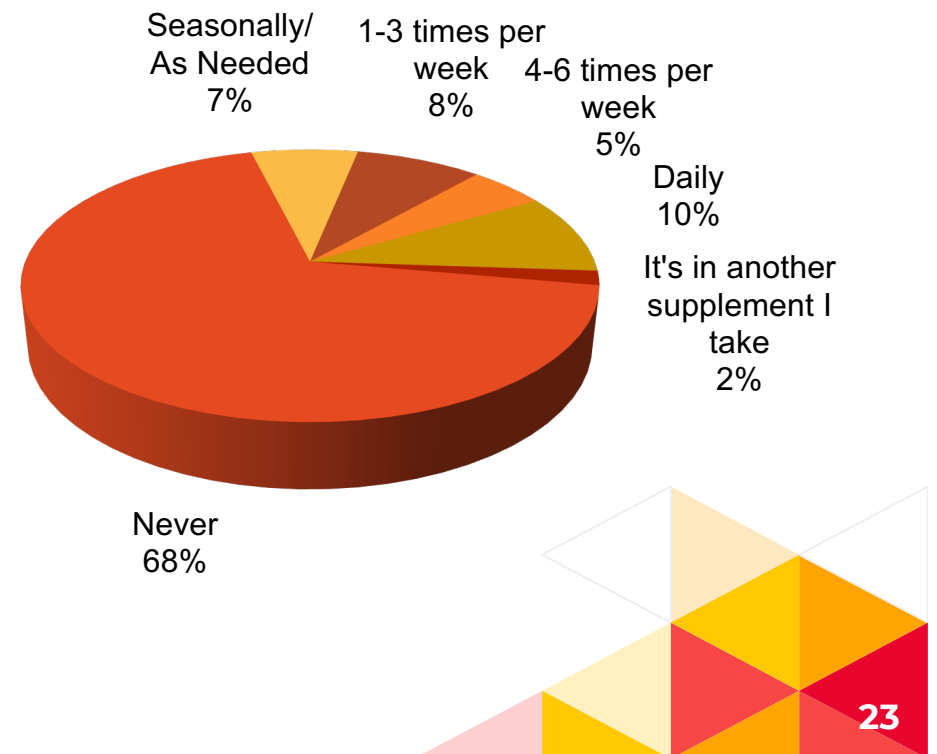


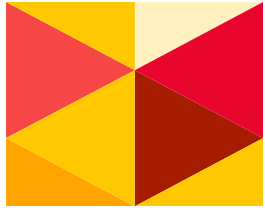
CoQ10 Usage

- 32% of surveyed supplement users are using CoQ10 at some level (an increase from 26% last year)
- 47% of Users are **REGULAR USERS** (4+ times per week), which is consistent with last year's survey base



Consumer Usage of CoQ10



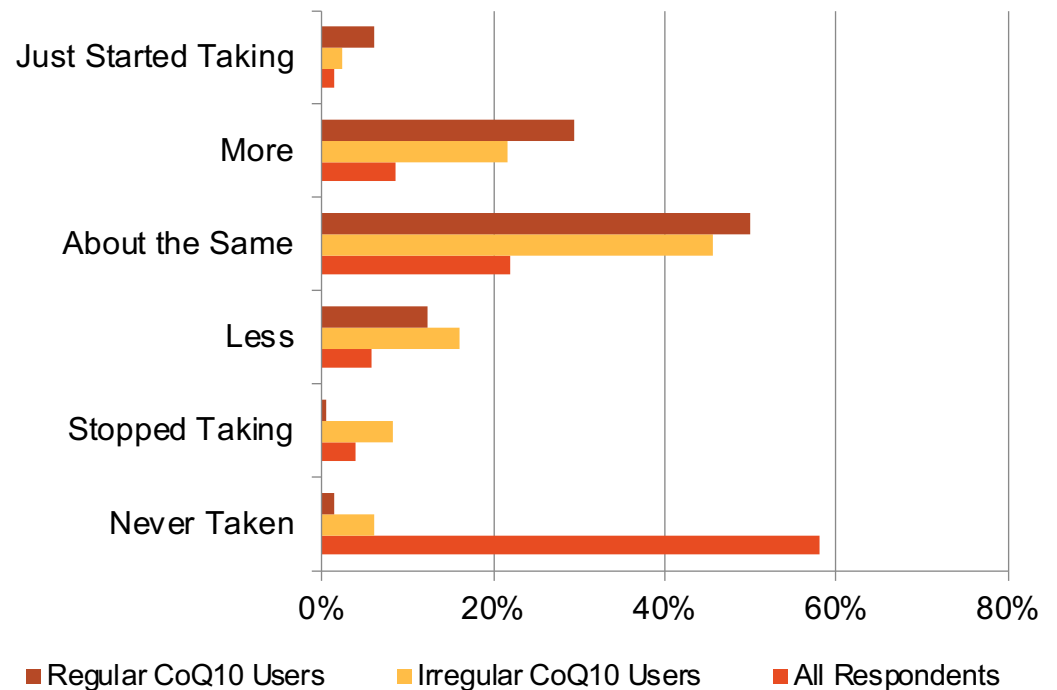


CoQ10 Usage CHANGE



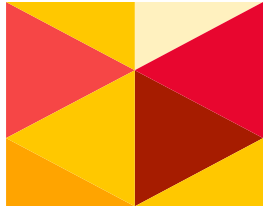
- 36% of Regular Users indicated that they had just started taking or increased their usage in the last year, with 17% indicating “significantly more” usage
- 25% of Irregular Users indicated that they were using CoQ10 less or had stopped taking in the last year

CoQ10 Usage Change



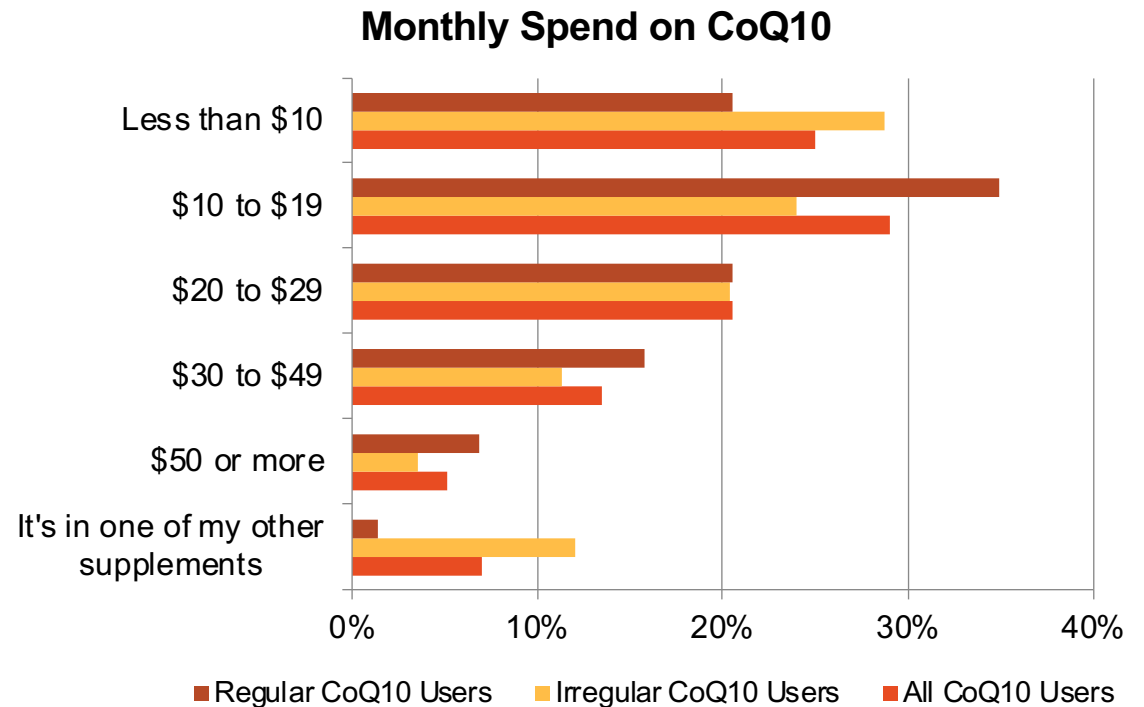
Note: Regular Users indicated using supplement at least 4 times per week. N=146 for CoQ10 Regular Users, N=167 for CoQ10 Irregular Users





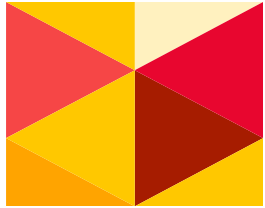
Monthly Spend on CoQ10

- ▶ CoQ10 users at all levels are spending more on CoQ10 supplements than consumers spend on many, but not all, other supplements
- ▶ Regular Users' average monthly spend of \$21 and Irregular Users average of \$17 are both up from what was reported last year
- ▶ Regular Users' average monthly spend is only about 28% more than what Irregular Users spend, which is actually below average relative to all supplements considered in this study except multivitamins



Note: Regular Users indicated using supplement at least 4 times per week. N=146 for CoQ10 Regular Users, N=167 for CoQ10 Irregular Users



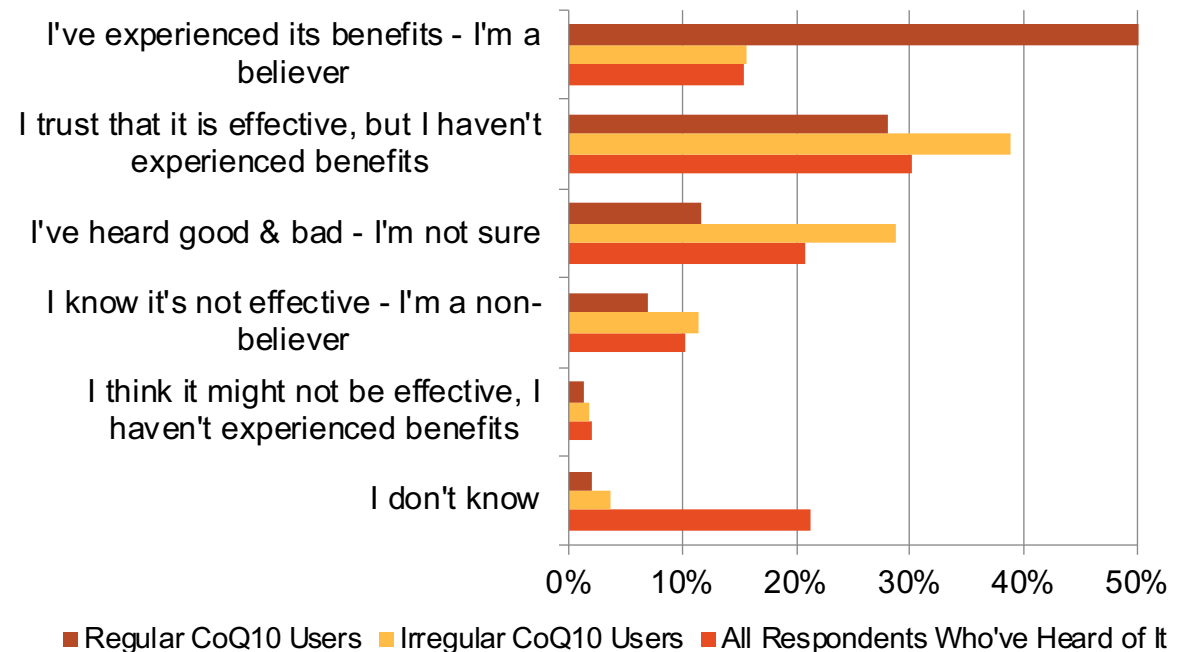


Perceived Effectiveness of CoQ10



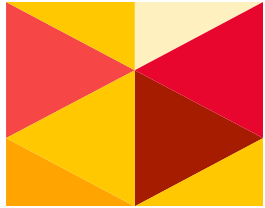
- ▶ Half of Regular Users have experienced the benefits of CoQ10, which is typical of regular users of any supplement
- ▶ Irregular users continue to trust in rather than feel the benefits of CoQ10, indicating that there is room for education on effective doses

Perceived Effectiveness of CoQ10



Note: Regular Users indicated using supplement at least 4 times per week. N=146 for CoQ10 Regular Users, N=167 for CoQ10 Irregular Users, N=712 for Heard of CoQ10



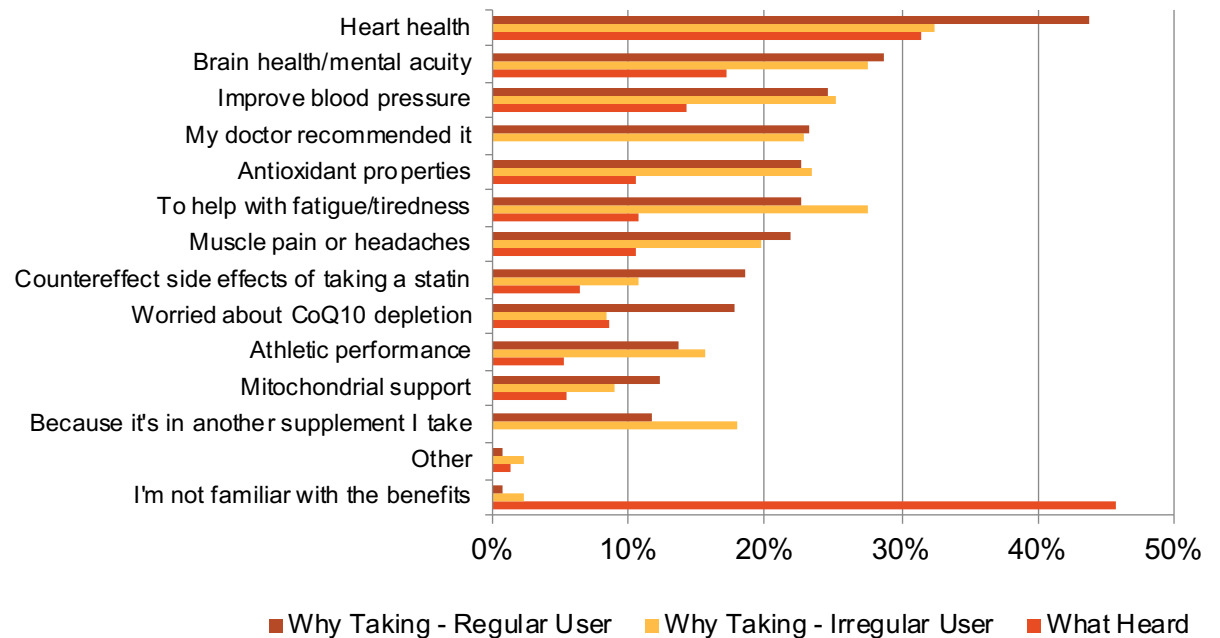


Benefits of CoQ10



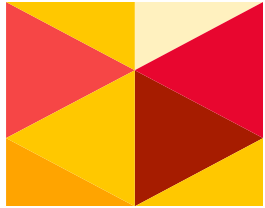
- ▶ Nearly half of supplement users that have heard of CoQ10 continue to be unfamiliar with the benefits
- ▶ Heart health is clearly the most recognized benefit of CoQ10 supplementation
- ▶ Doctors aren't as strong a source of recommendation as they should be given their involvement in prescribing statins
- ▶ A considerable subset of Regular Users recognize the need to avoid CoQ10 depletion and the side effects of statins

Benefits of CoQ10



Note: Regular Users indicated using supplement at least 4 times per week. N=146 for CoQ10 Regular Users, N=167 for CoQ10 Irregular Users, N=401 for Heard of but not taking CoQ10



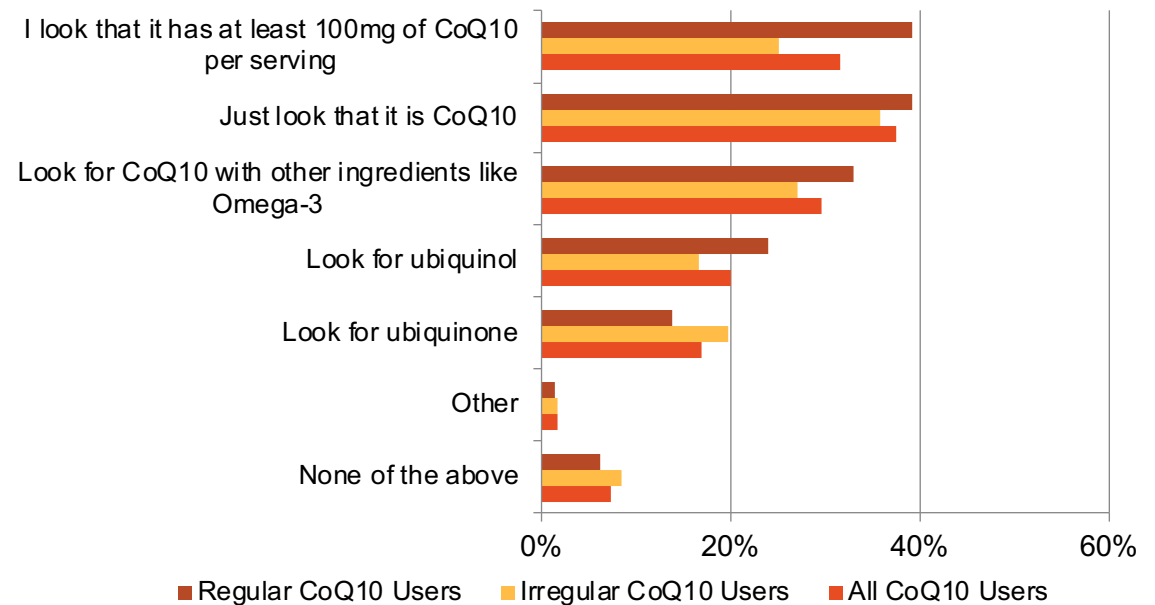


CoQ10 Purchasing Decision



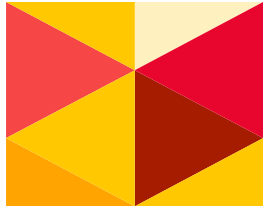
- ▶ A significant portion of all users are looking for at least a 100mg serving
- ▶ No matter the usage levels, most users aren't considering the subtleties of CoQ10 and aren't sophisticated enough to search for ubiquinol vs. ubiquinone

CoQ10 Key Characteristics



Note: Regular Users indicated using supplement at least 4 times per week. N=146 for CoQ10 Regular Users, N=167 for CoQ10 Irregular Users



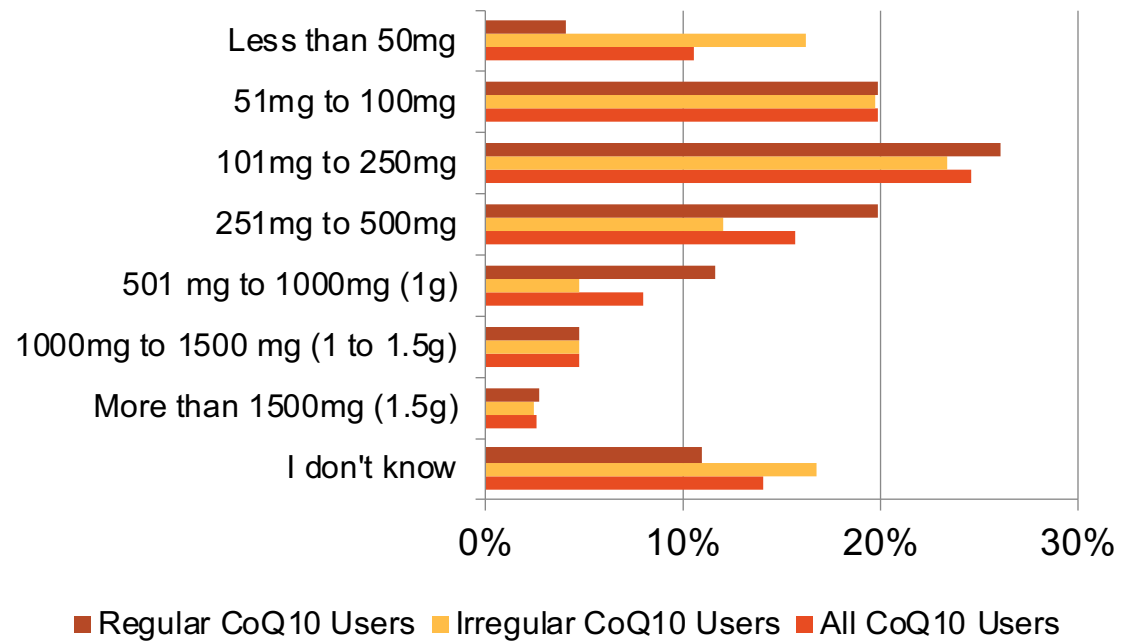


CoQ10 Dosages



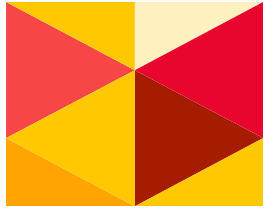
- Regular Users are more likely to know what dosage they take
- Knowledge of dosage is fairly good compared to other supplements
- 51 to 100mg dosage is most popular
- Reported dosage levels are on the rise compared to last year, especially among Regular Users (39% using dosage above 250 mg vs. 23%)

CoQ10 Dosage Preference



Note: Regular Users indicated using supplement at least 4 times per week. N=146 for CoQ10 Regular Users, N=167 for CoQ10 Irregular Users



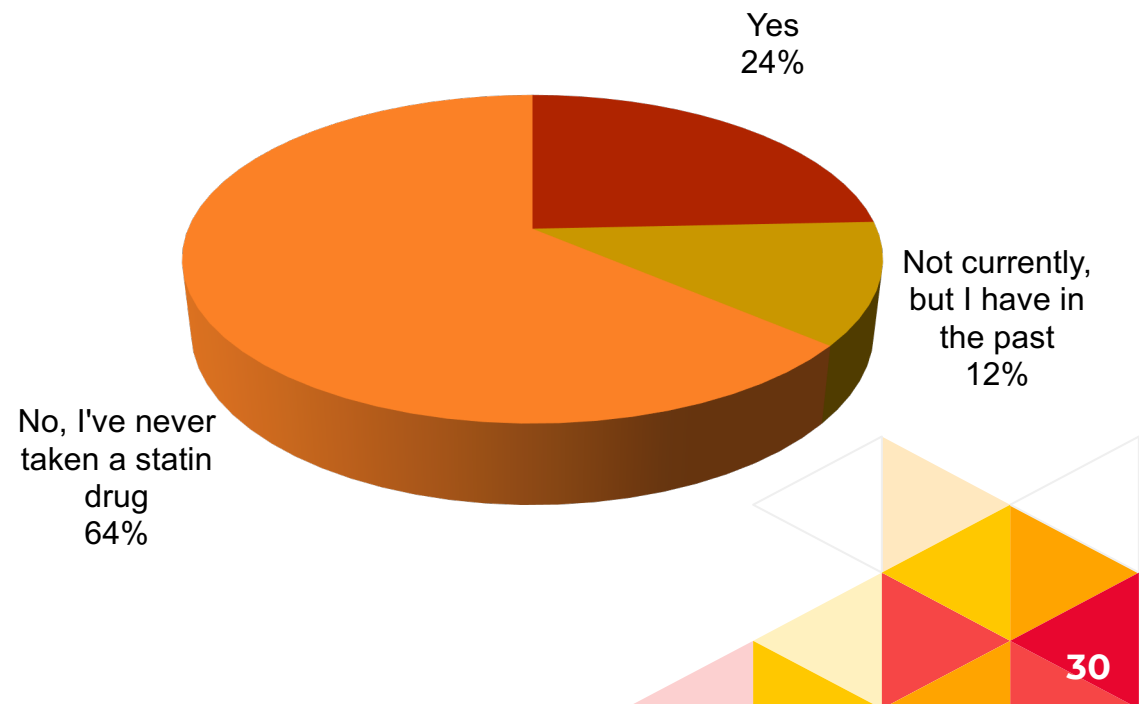


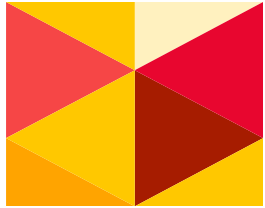
Statins & CoQ10



- ▶ 24% of all study participants indicated that they are taking a statin drug
- ▶ 33% of all CoQ10 users (at any level) take a statin while 23% took a statin in the past
- ▶ 44% of Regular CoQ10 users take a statin and 16% are past statin takers

Consumer Statin Usage





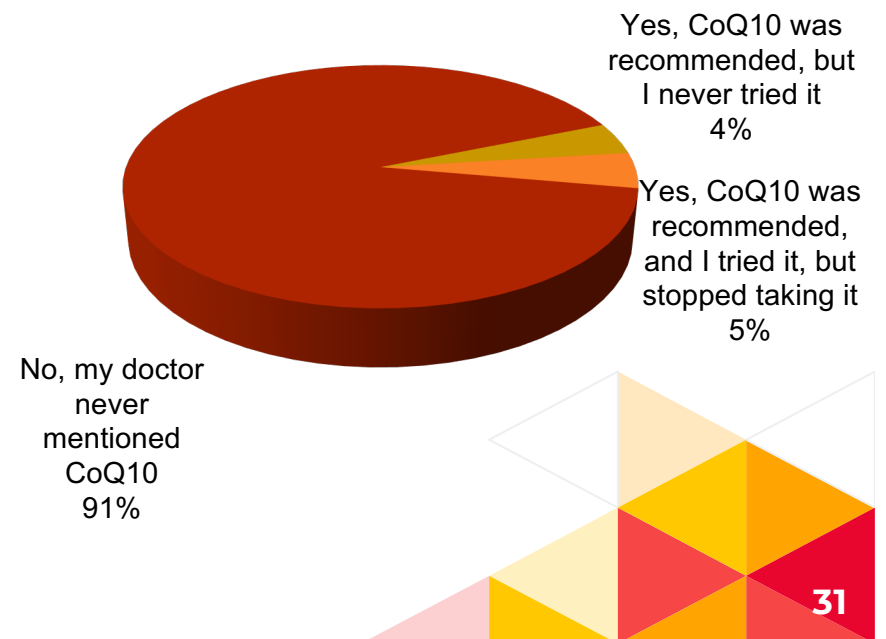
Statins But no CoQ10

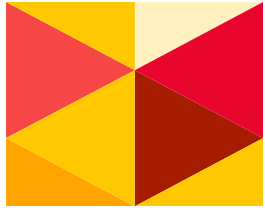


- ▶ This year's surveyed statin users are more knowledgeable regarding CoQ10 than those responding last year, but there is still much room for improvement:
 - ▶ 22% of Statin Users said they had NEVER HEARD of CoQ10 (an improvement over 27% last year)
 - ▶ Only 25% have experienced CoQ10 benefits and consider themselves a "believer" (up from 19% last year)
 - ▶ 58% of Statin Users NEVER take CoQ10 and only 26% are REGULAR USERS (versus 66% & 21% last year)
 - ▶ Among current and past statin users who do not currently take CoQ10, 96% and 77%, respectively have NEVER had their Dr. recommend CoQ10
 - ▶ Among current statin users currently taking CoQ10, 26% say they take it because their Dr. recommended it, and 27% do take it to counteract side effects of the statin (vs. 37% and 43% last year)

Note: N=190 for current or past statin users who are not taking CoQ10

Lack of Dr. Recommendation for Statin Users not taking CoQ10

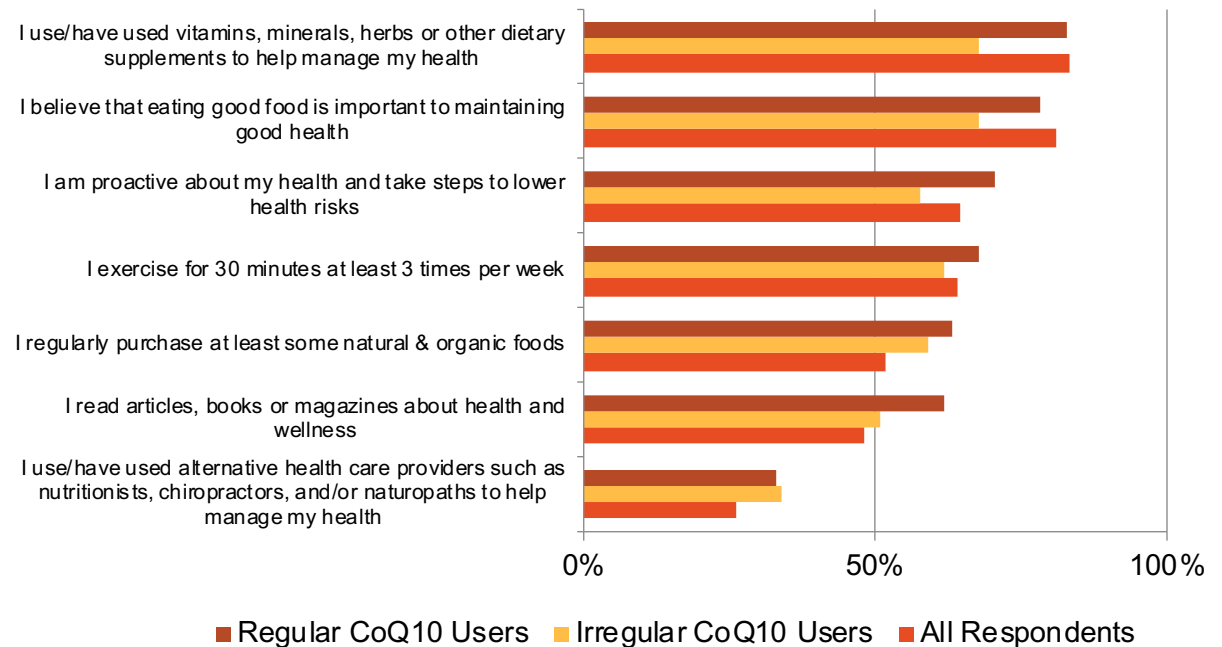




Profile of CoQ10 User

- Regular Users vs. Irregular Users
 - Equally likely to be male or female
 - More likely to be 56 or older (28% vs. 16%)
 - Higher income (69% vs. 53% >\$70k)
 - Less ethnically diverse (59% vs. 49% white, not Hispanic)
 - Fewer Southerners (31% vs. 43%)
- Irregular Users are
 - Younger than the average supplement user surveyed (68% under 46 vs. 50% overall)

User Characteristics



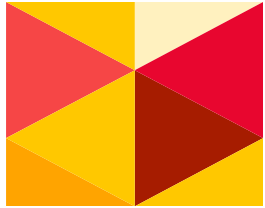
Note: Regular Users indicated using supplement at least 4 times per week. N = 146 for Regular Users, N=167 for Irregular Users. Respondents who said they had "never heard of" the supplement were excluded from User groups.





Demographics & Psychographics





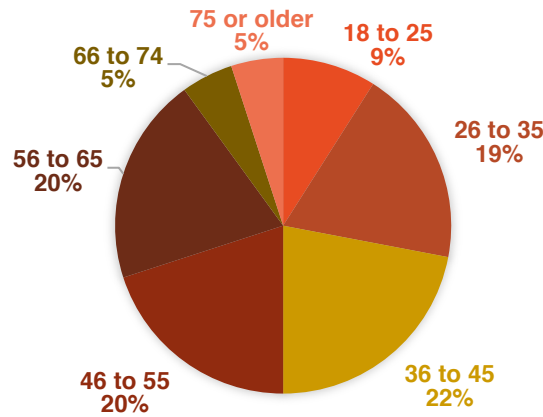
Survey Demographics

- Fairly even mix of men and women (no more than 55% women)
- Adult consumers, with consumers age 66+ no more than 10% of sample
- A diverse balance of all income groups



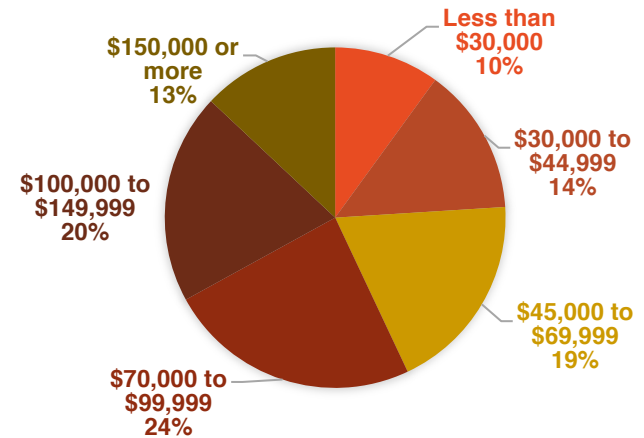
Female
54%

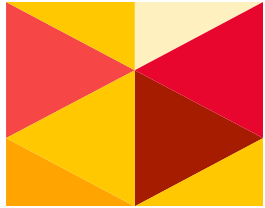
AGE



Male
46%

INCOME

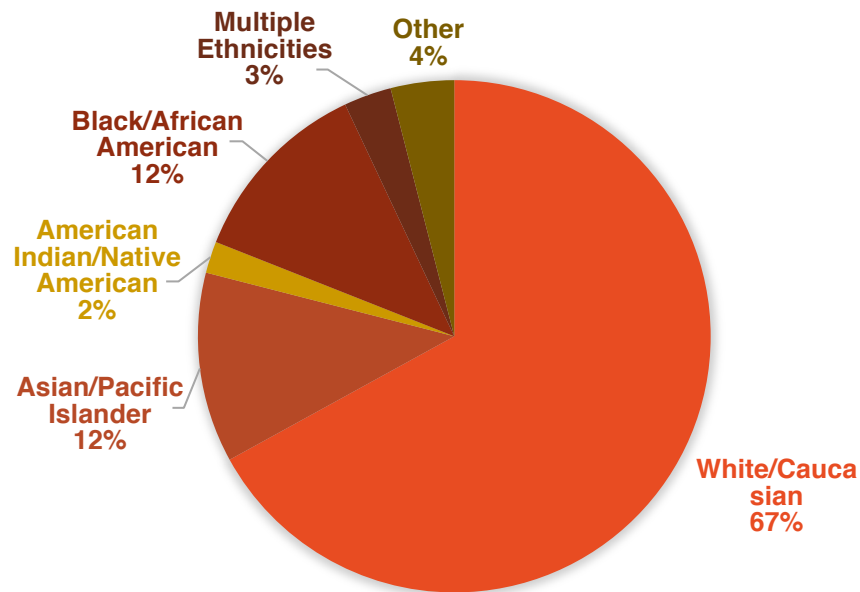




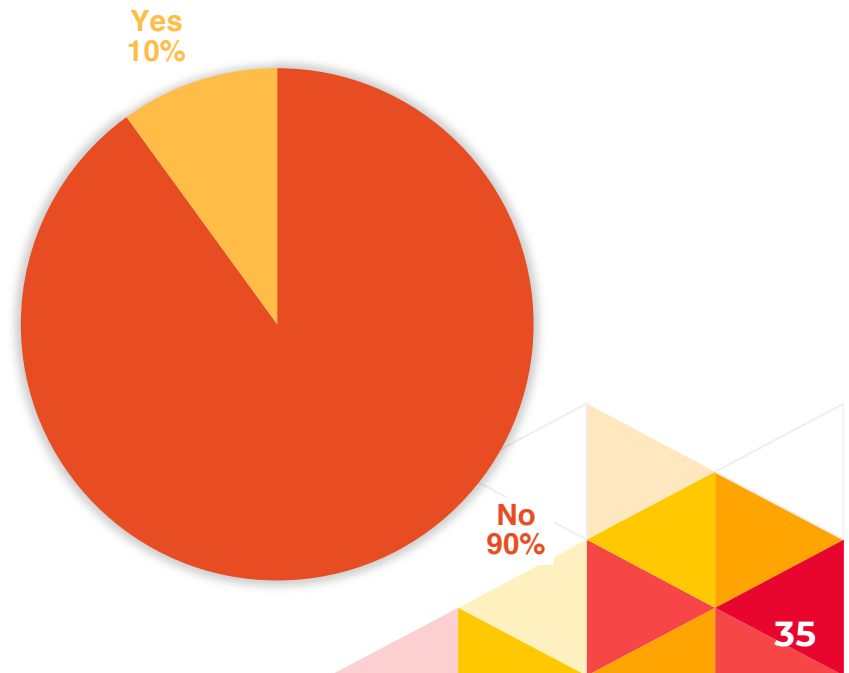
Survey Demographics

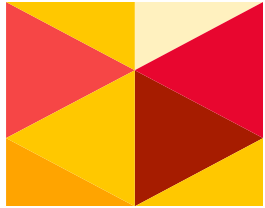
- Consumers with a diverse ethnic background

RACE



HISPANIC/LATINO/SPANISH



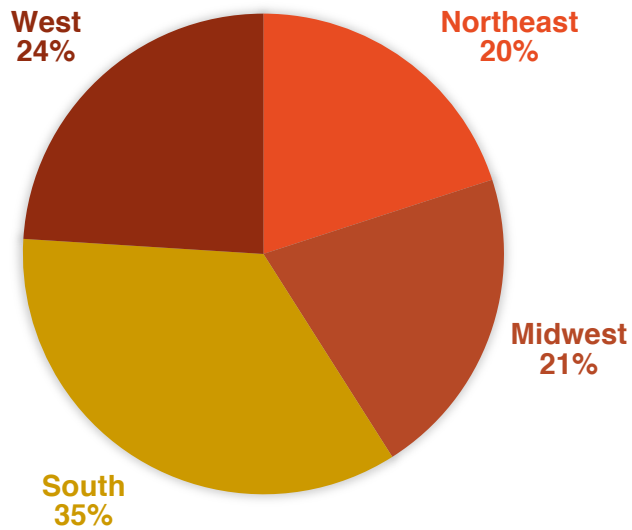


Survey Demographics

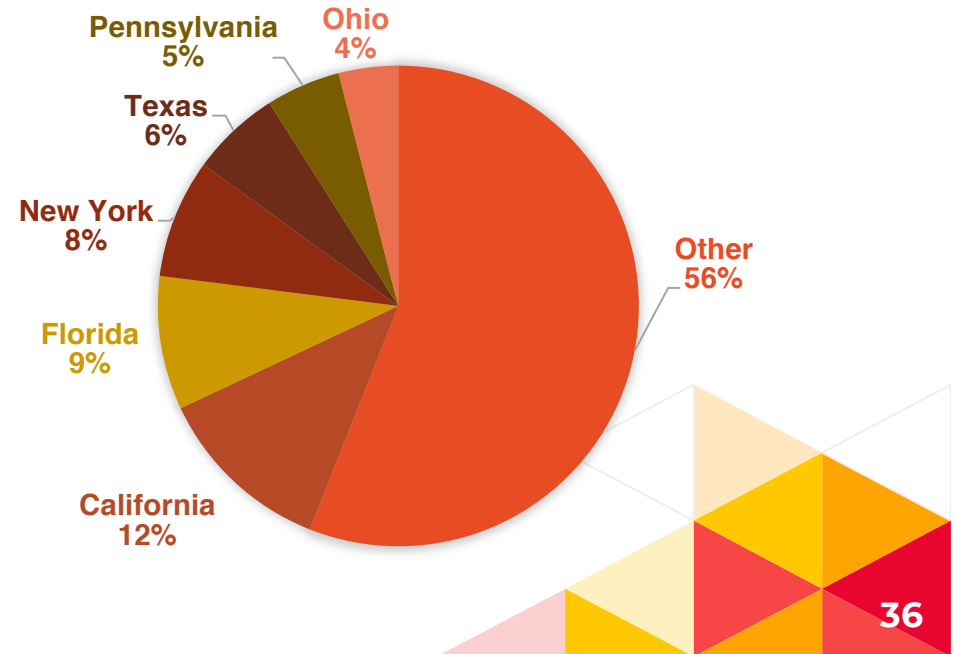


- Consumers living all over the U.S.

GEOGRAPHIC REGION



TOP STATES





**For more information or
questions, please contact
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