ITC INSIGHTS: SUPPLEMENT CONSUMER SURVEY 2020

COQ10 INSIGHTS

ITC INSIGHT

CONSUMER SURVEY 2020

Fielded June-July 2020
- Fielded online by Dynata and analyzed by Trust Transparency Center

Survey of 2,004 consumers
- US - 1,000 consumers
- UK - 501 consumers
- Germany - 503 consumers

General Criteria for Participation
- Supplement users, with sporadic users no more than 7% of sample (vs. the 5% limit in previous years)
- Disqualified poor quality responses and respondents who did not fit survey consumer profile parameters

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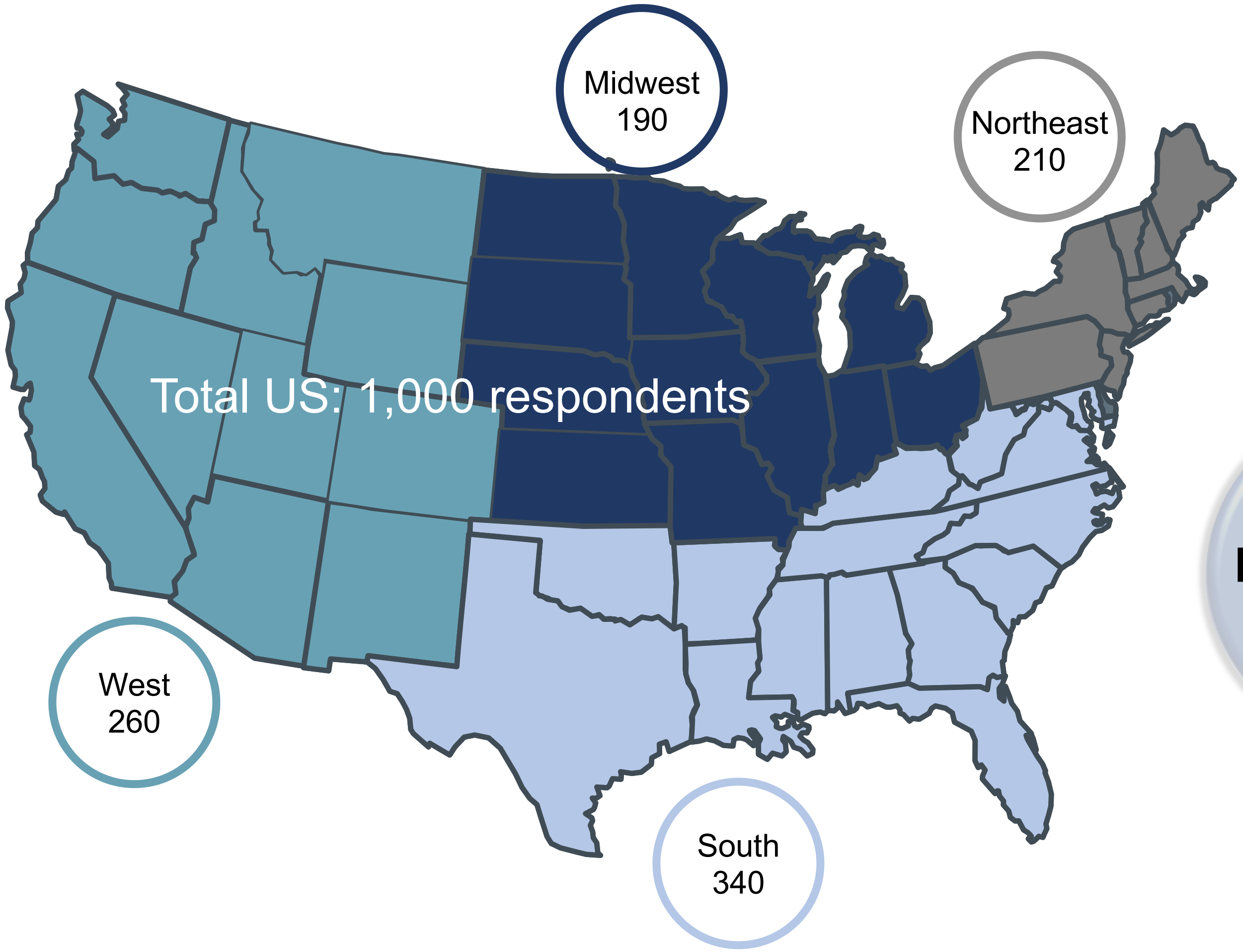
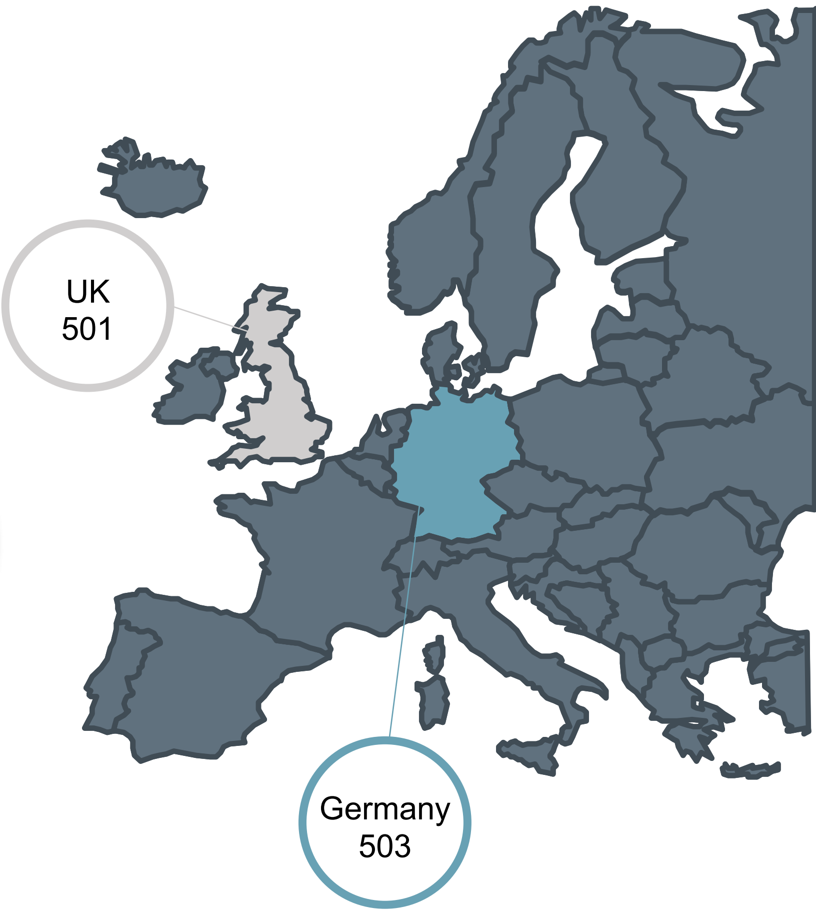
Trust Transparency Center ITC Insights – Consumer Survey 2020

GENERAL DEMOGRAPHICS

GEOGRAPHIC OVERVIEW



Total Respondents: 2,004



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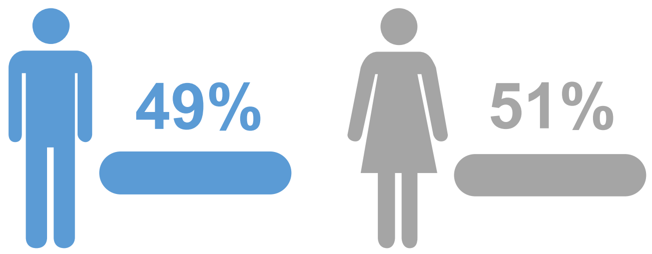
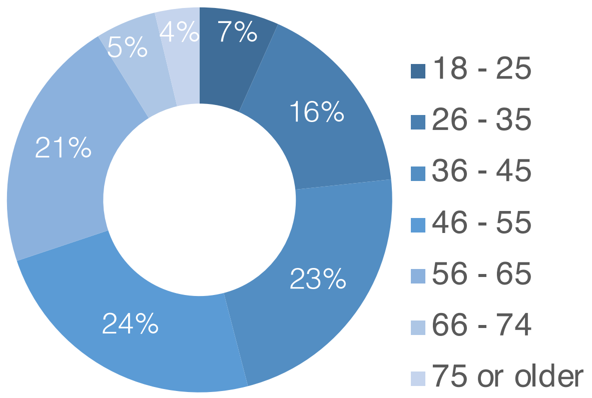
DEMOGRAPHICS

GENDER



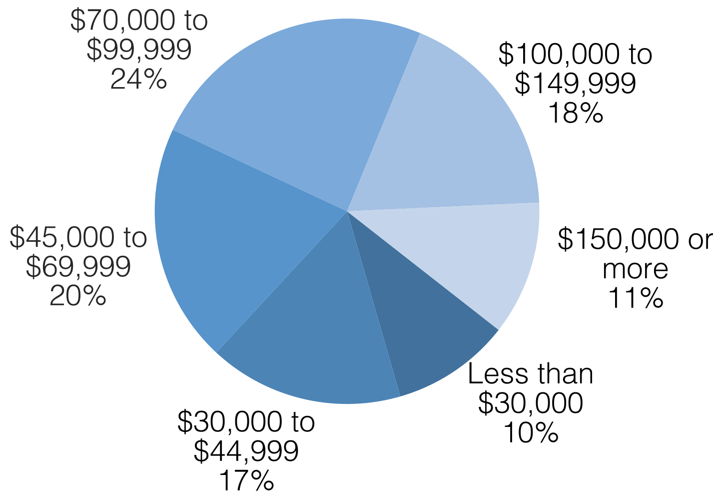
Even mix of men and women (US limited to no more than 55% women, while UK 45% women and German 50% women fell out naturally from respondent pool)

AGE



Adult consumers, with consumers age 66+ no more than 10% of sample (Germany respondents younger with 28% 35 or younger)

INCOME



A diverse balance of all income groups. UK & Germany pushing average income lower than in previous years, with 30% under $45,000 per year vs. 23% in US

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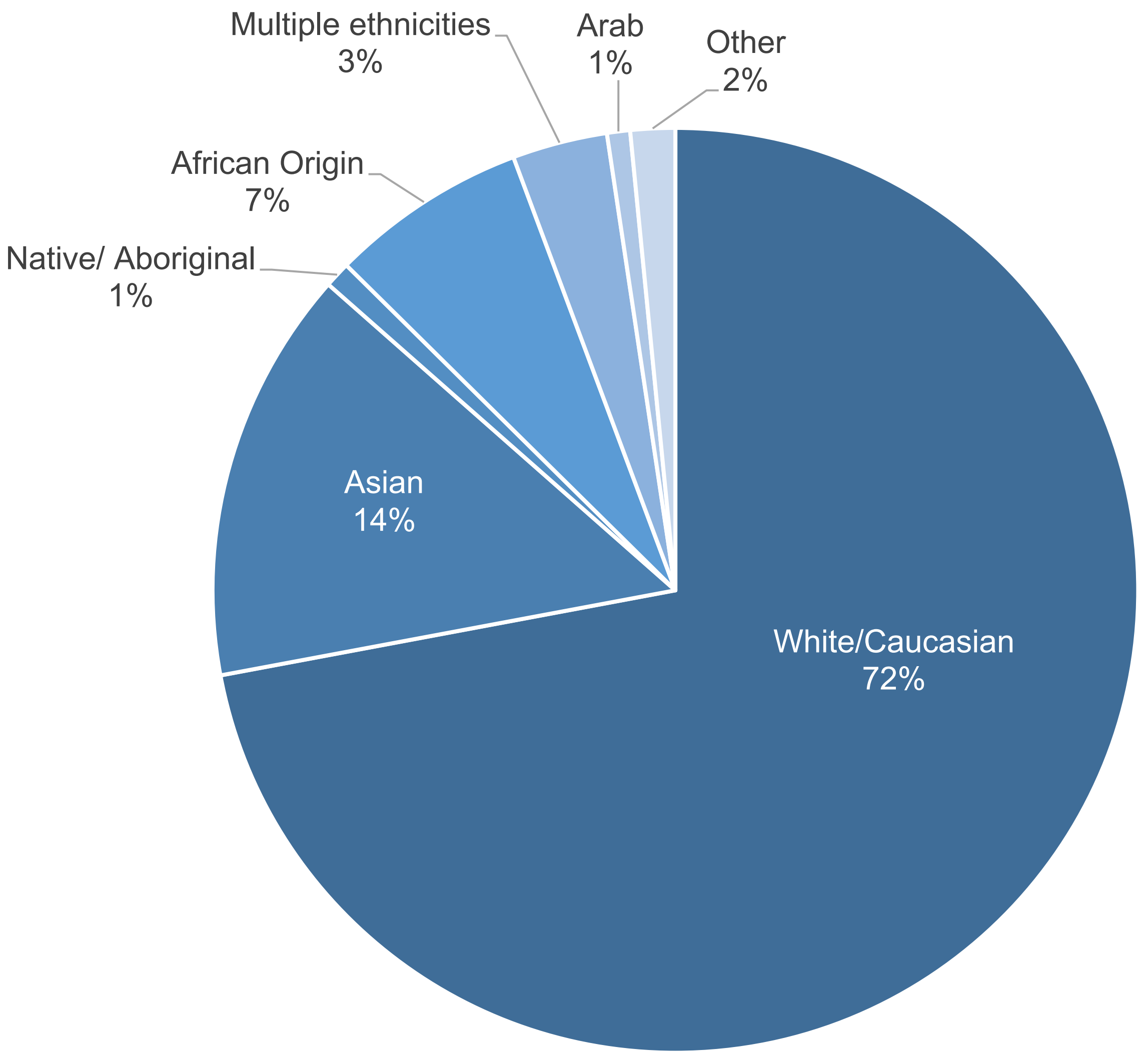
ETHNIC BACKGROUND

KEY ITC INSIGHTS:

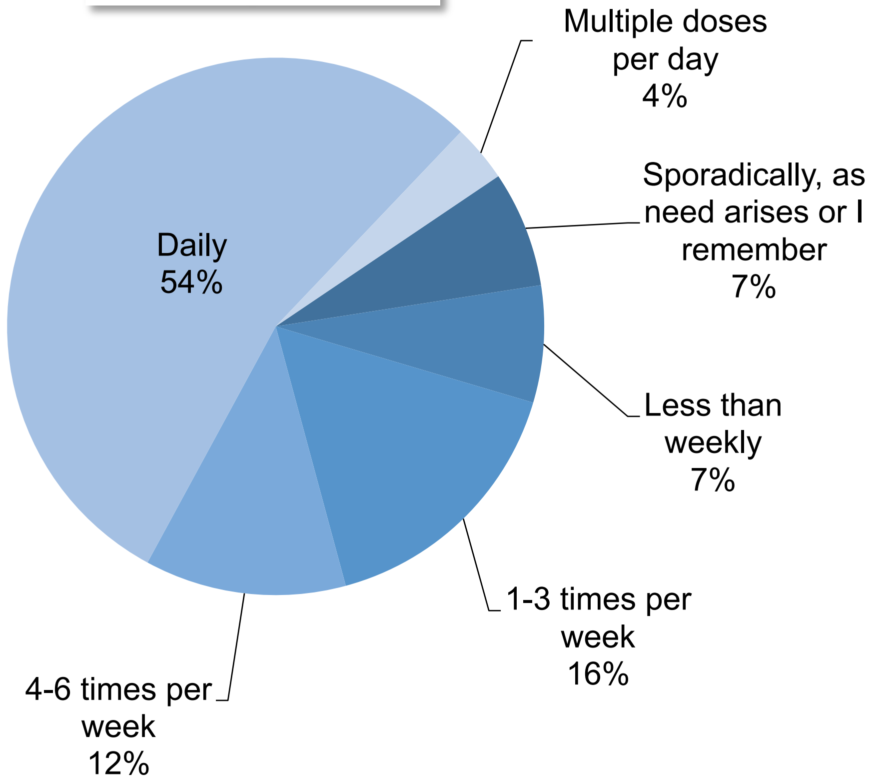
- Consumers with a diverse ethnic background
- US respondents were limited to no more than 70% white to ensure inclusion of ethnic responses
- UK respondents were more diverse, with only 56% white, while lack of diversity in Germany required acceptance of 89% white respondents (American Indian option only available in US, Arab in UK/Germany)



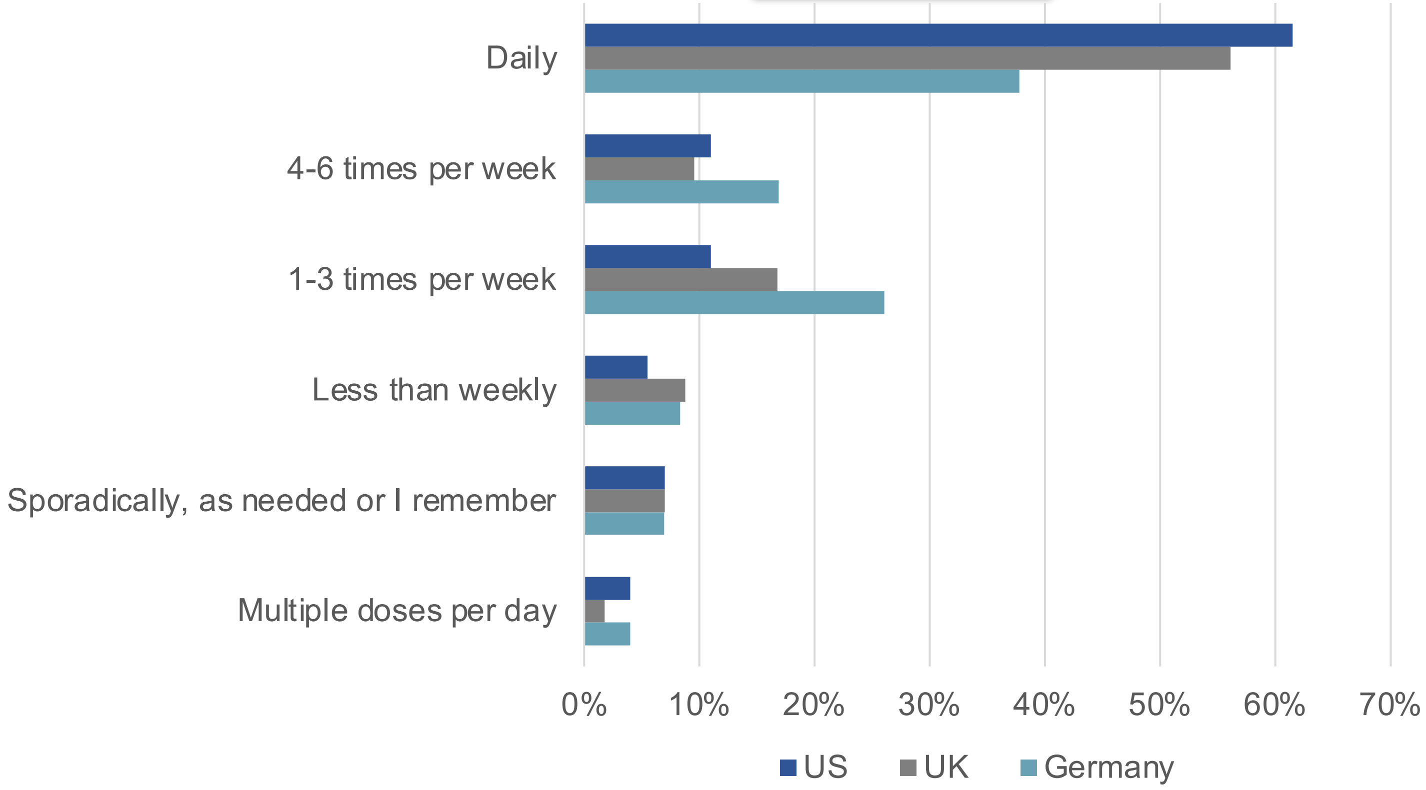
SUPPLEMENT USE

KEY ITC INSIGHT:
- Most respondents are consuming supplements do so daily

All Respondents



By Country



In Germany, fewer regular supplement users consume daily. Whilst still the most popular, more also take supplements between 1 and 6 times per week.

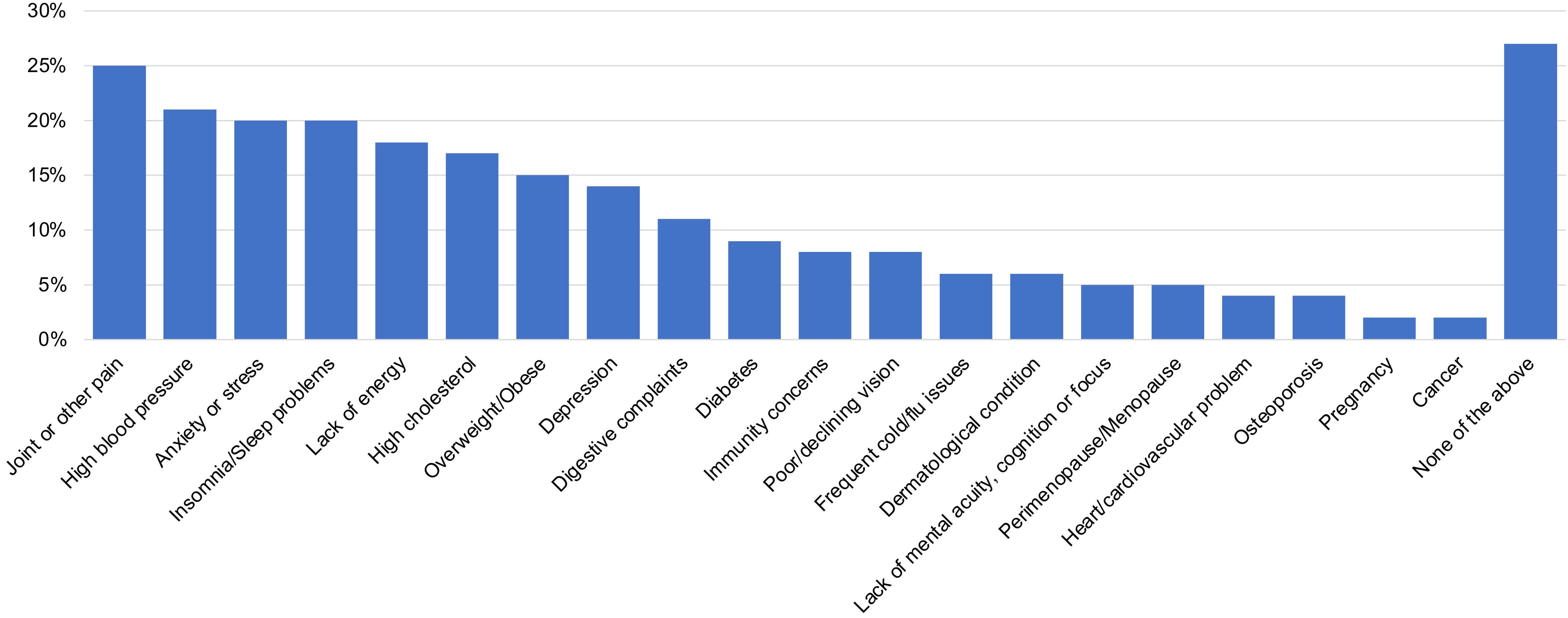
Question: "How often do you take vitamins, minerals, herbs or other dietary supplements?"

CONSUMER SUPPLEMENT DATA: OVERVIEW

HEALTH CONCERNS

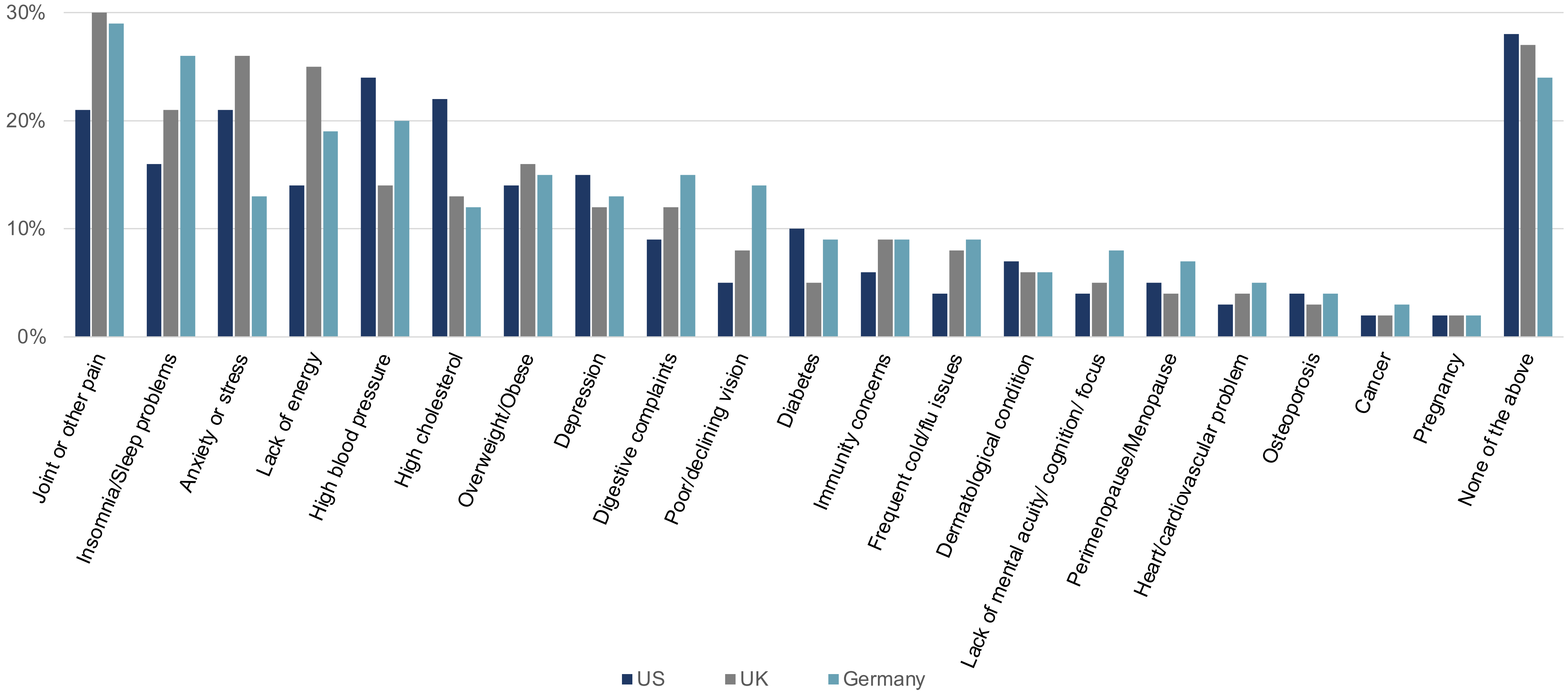
KEY ITC INSIGHT:

- Most respondents are experiencing a variety of health issues



Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

HEALTH CONCERNS

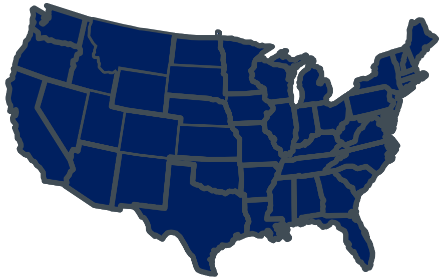


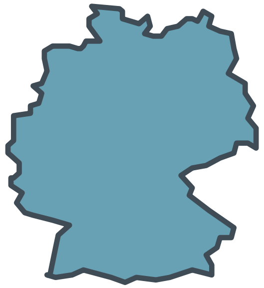
Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

HEALTH CONCERNS

KEY ITC INSIGHTS:

- Medicalized issues relating to blood pressure and cholesterol dominate US consumer concerns
- Concerns about lack of energy and mental well-being are high in the UK





US Top 3 Health Concerns

- High Blood Pressure
- High Cholesterol
- Anxiety or Stress & Joint or Other Pain

UK Top 3 Health Concerns

- Joint or Other Pain
- Anxiety or Stress
- Lack of Energy

Germany Top 3 Health Concerns

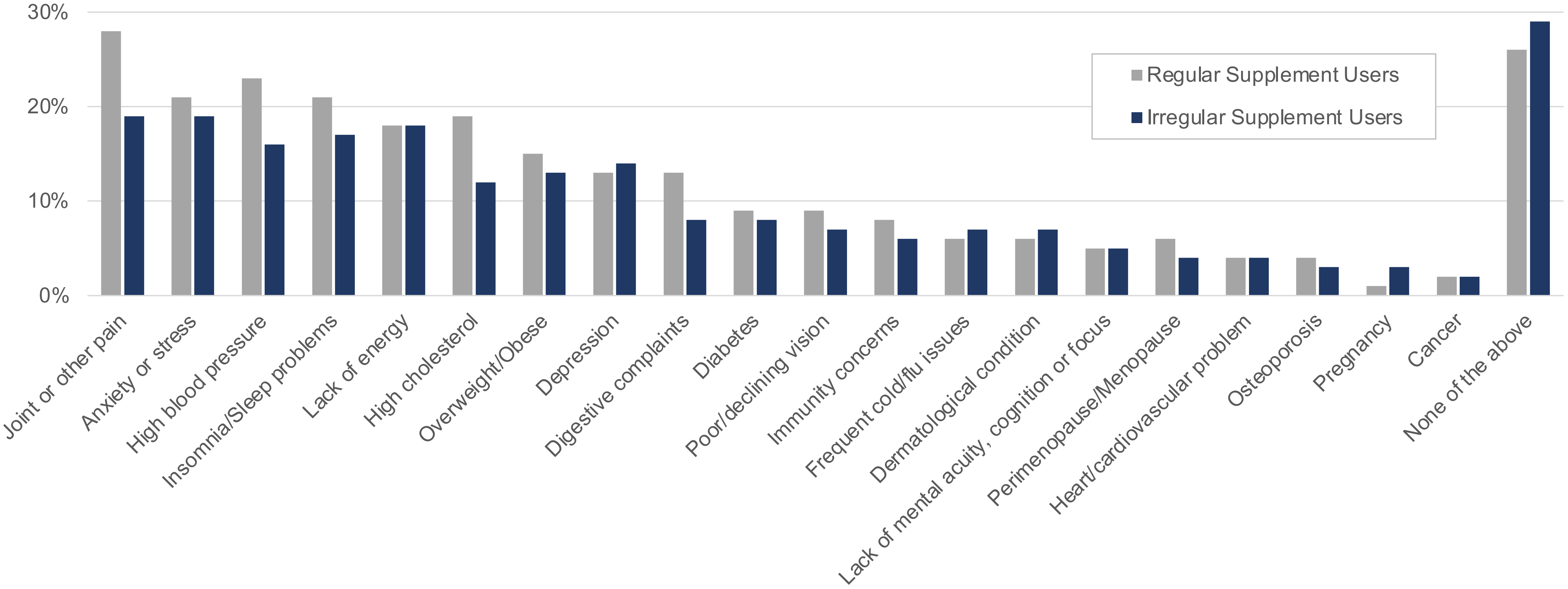
- Joint or Other Pain
- Insomnia/ Sleep Problems
- High Blood Pressure

Question: “Which of the following health conditions impact you currently or have impacted you within the past year?”

HEALTH CONCERNS

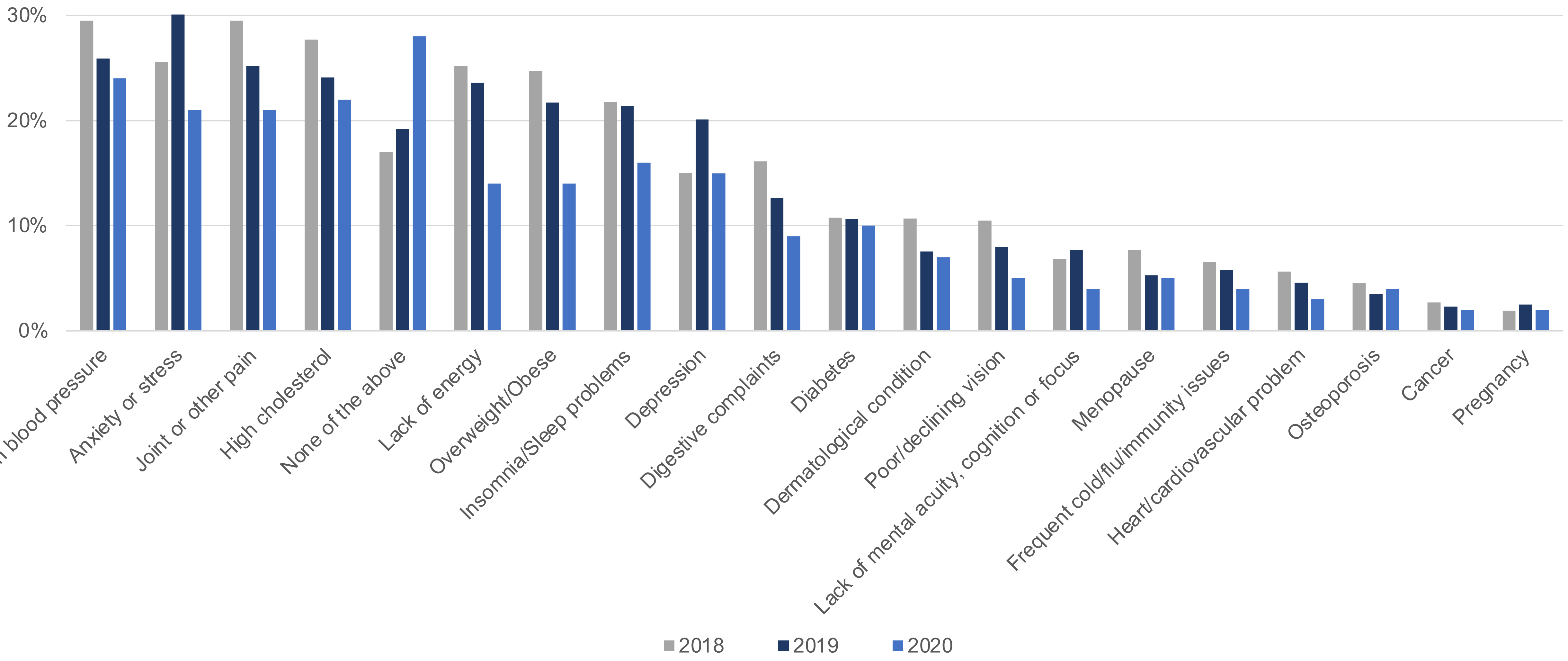
KEY ITC INSIGHT:

- Regular supplement users are more likely to be suffering from chronic health issues



Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

HEALTH CONCERNS: 2018-2020 (US DATA)

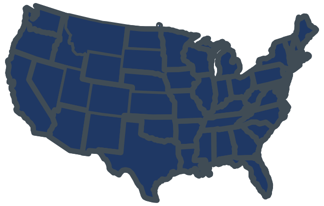


Question: “Which of the following health conditions impact you currently or have impacted you within the past year?”

WHAT SUPPLEMENTS THEY TAKE (UNAIDED RESPONSES)

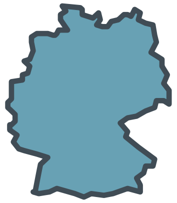
KEY ITC INSIGHTS:

- While multivitamins are at the top of the UK and US lists as expected, they are under indexed in
- B vitamins top the list in Germany and are high in all three countries
- UK consumers are above average users of omegas and glucosamine
- German consumers are above average users of magnesium



US Top 7 Supplements	
Multivitamins	50.1%
Vitamin D	28.1%
B Vitamins	24.2%
Omegas	18.3%
Calcium	11%
Probiotics	7.3%
Magnesium	5.8%

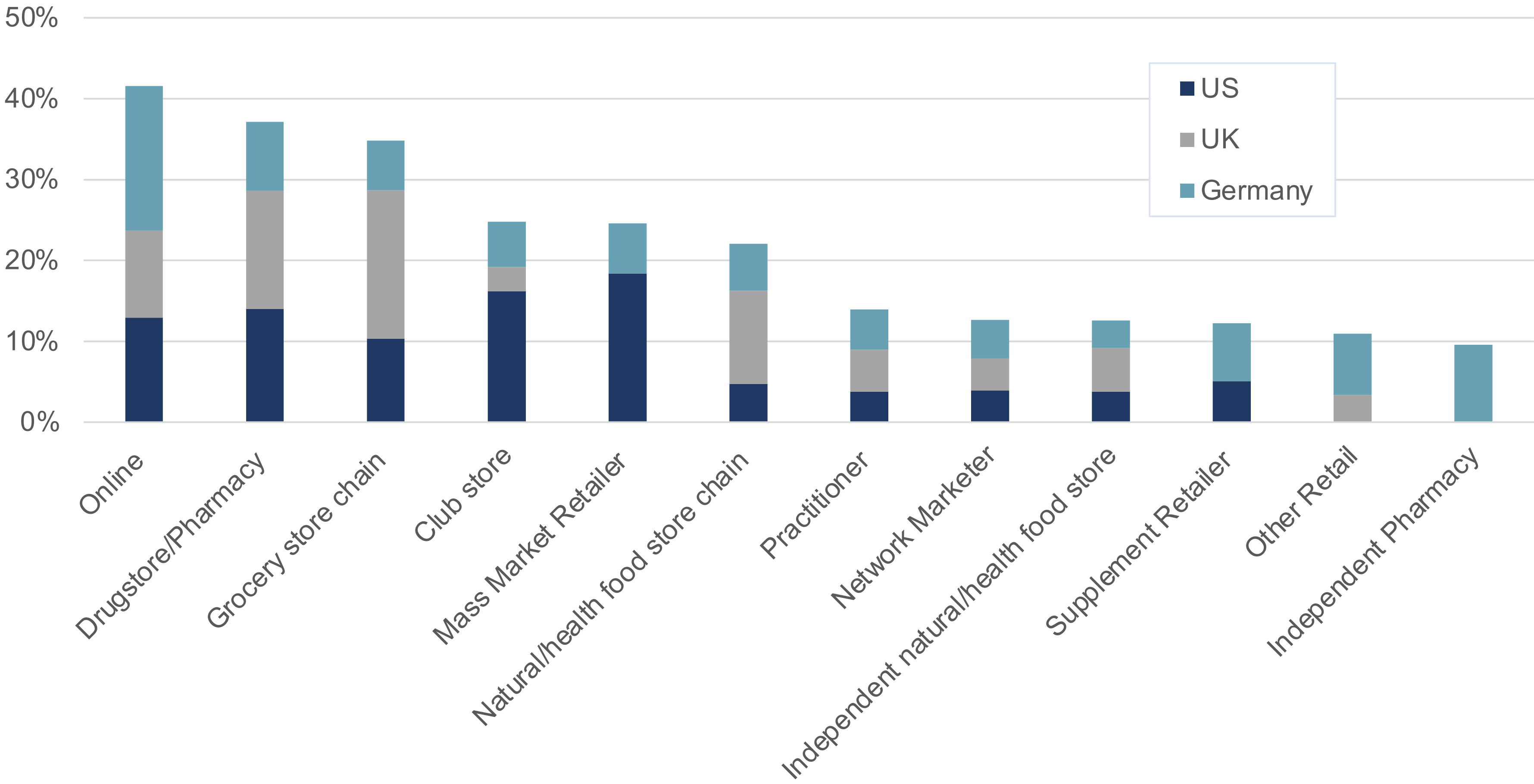
UK Top 7 Supplements	
Vitamin D	32.8%
Multivitamin	30.1%
Omegas	25.4%
B Vitamins	15%
Glucosamine	5.4%
Calcium	4.4%
Magnesium	3.8%

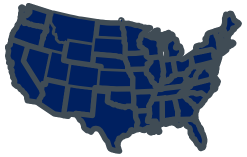


Germany Top 7 Supplements	
B Vitamins	36.4%
Magnesium	32.8%
Vitamin D	26.4%
Glucosamine	20%
Multivitamin	16.5%
Calcium	9.7%
Omegas	9.4%

PURCHASE LOCATION

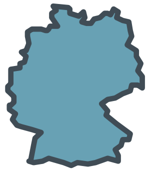
KEY ITC INSIGHTS:
- Supplement users purchase at a diverse set of retail and online locations, with great variations by country
- German markets differ significantly to US and UK market, with greater online purchases and a focus on pharmacy channels





US Top 3 Channels
- Mass Market Retailer
- Club Store
- Drugstore/Pharmacy

UK Top 3 Channels
- Grocery Store Chain
- Drugstore/Pharmacy
- Natural/Health Food Store



Germany Top 3 Channels
- Online
- Independent Pharmacy
- Drugstore/Pharmacy

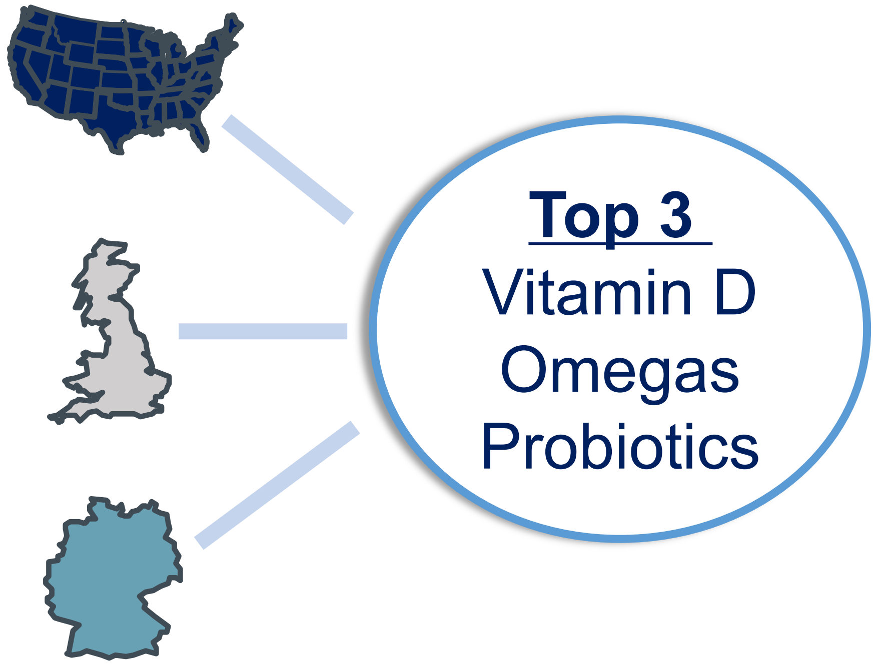
Note: Purchase locations and examples varied by country. “Independent Pharmacy” & “Other Retail” option not available to US respondents, “Mass Market Retailer” & “Supplement Retailer” not shown for UK.

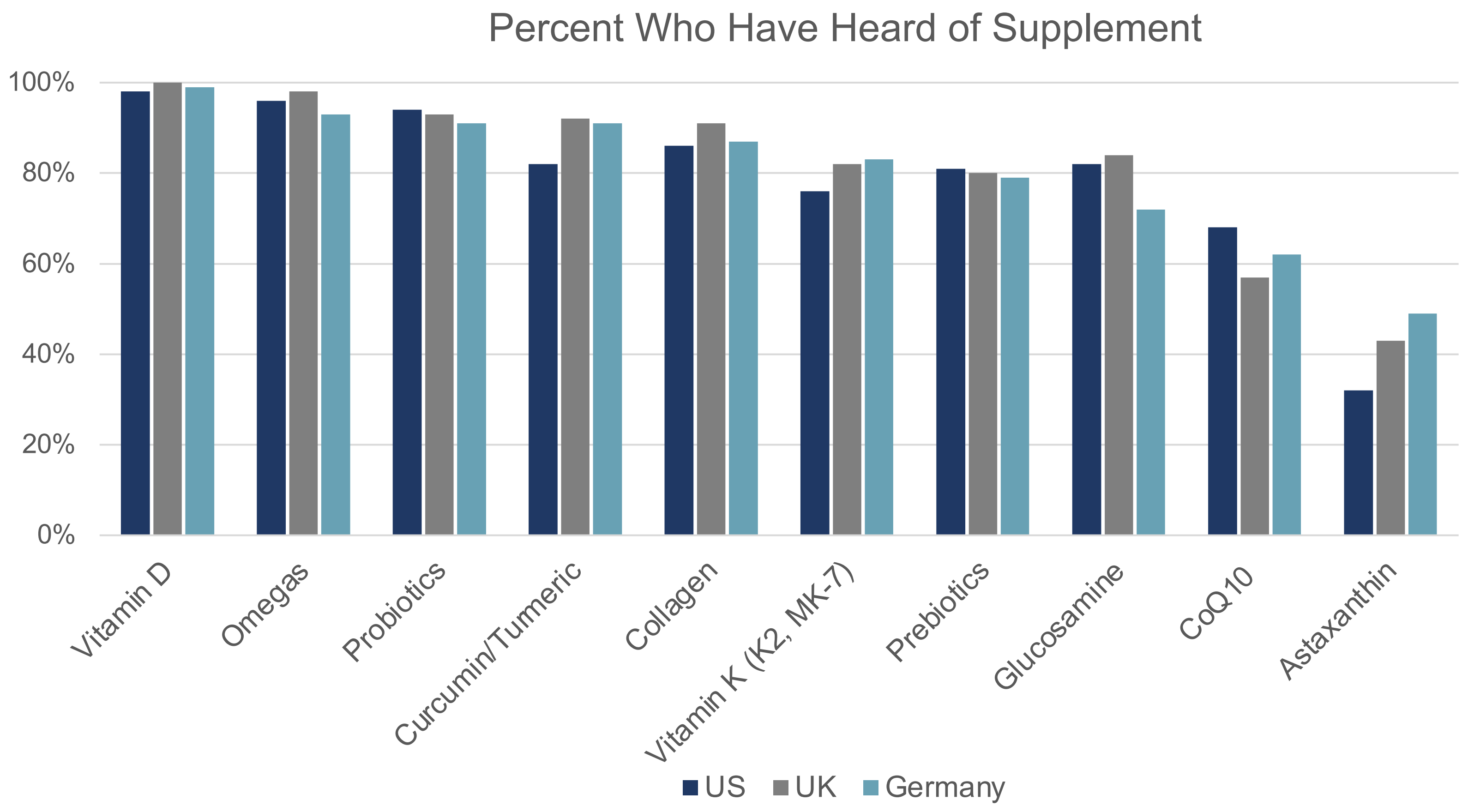
CONSUMER SUPPLEMENT DATA: FAMILIARITY & PERCEIVED EFFICACY

FAMILIARITY WITH SUPPLEMENTS

KEY ITC INSIGHTS:

- Familiarity of supplement categories across US, UK and Germany is similar for most
- There is a notable drop in familiarity with glucosamine in Germany
- Familiarity for astaxanthin and CoQ10 differs between all three countries, with German consumers most familiar for astaxanthin and US for CoQ10



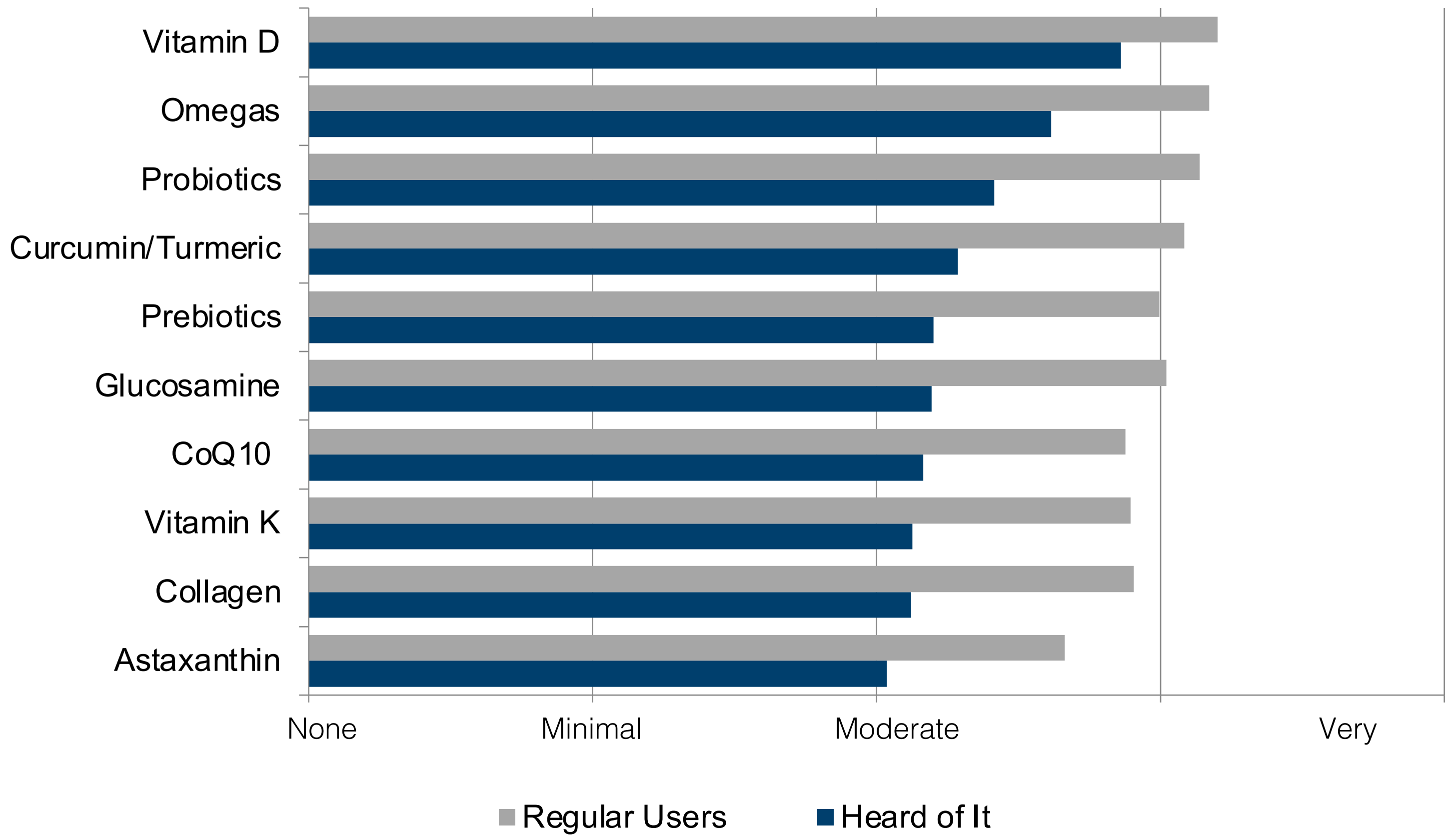


Question: “How familiar would you consider yourself regarding the use of these supplements?”. Respondents who did not answer “Never Heard of It”

FAMILIARITY WITH USAGE

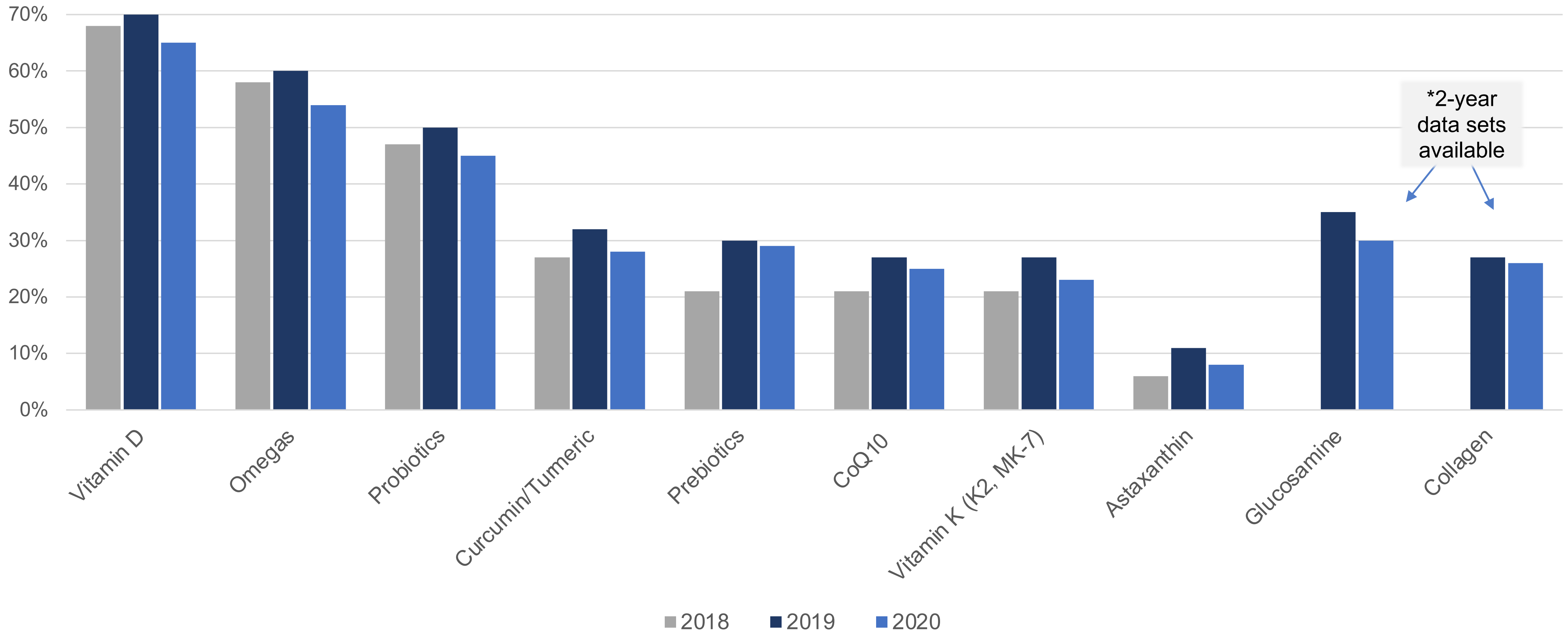
KEY ITC INSIGHTS:

- Regular users of a supplement are generally confident in their knowledge – even if they don't know everything they should/could
- Consumers feel most confident in their knowledge of the most widely used supplements – vitamin D, omegas, and probiotics
- While many consumers have never heard of supplements like astaxanthin, those who have generally feel they have good familiarity with it



Note: Regular users of specific supplement indicated using supplement at least 4 times per week. Question: "How familiar would you consider yourself regarding the use of these supplements?"

FAMILIARITY: 2018-2020 (US DATA)



Note: US regular users of specific supplement indicated using supplement at least 4 times per week. Question: "How familiar would you consider yourself regarding the use of these supplements?"

PERCEIVED EFFECTIVENESS

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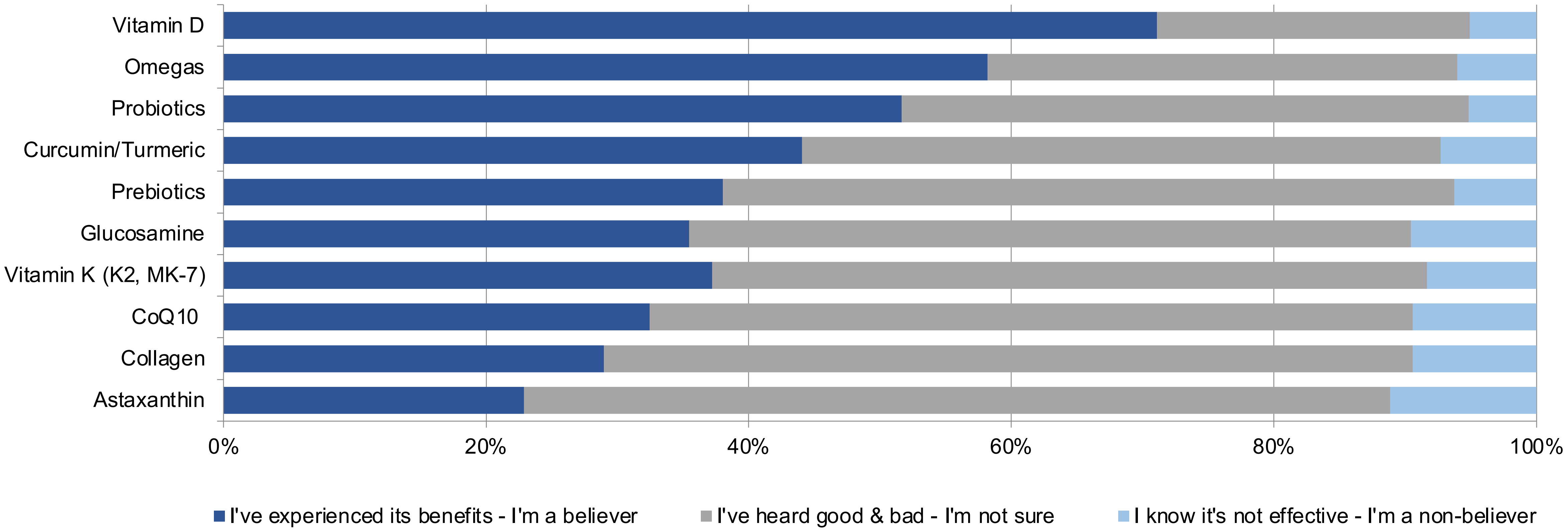
KEY ITC INSIGHTS:
- Many supplement users have concerns over the effectiveness of supplements
- Perceived effectiveness is closely tied to familiarity with usage

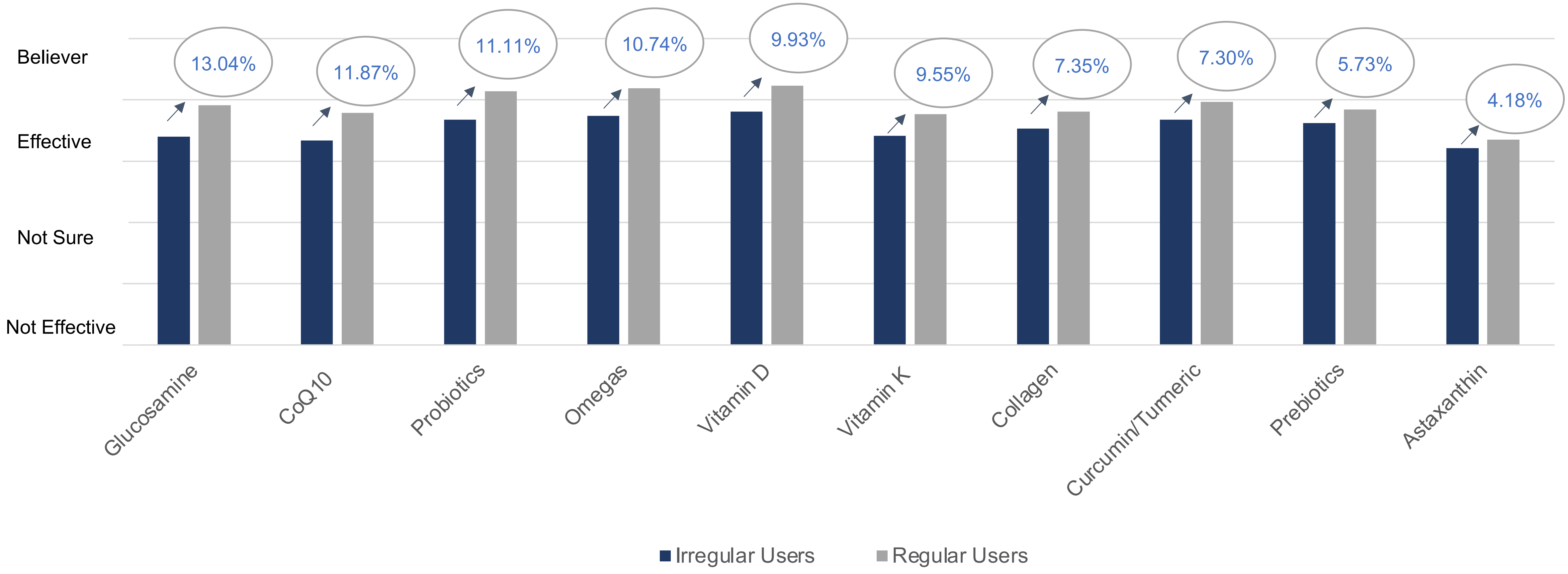


Note: Only consumers who had heard of the supplement answered this question for each specific supplement. Question: "What is your opinion of the effectiveness/benefit of each of these supplements?"

PERCEIVED EFFECTIVENESS

KEY ITC INSIGHTS:

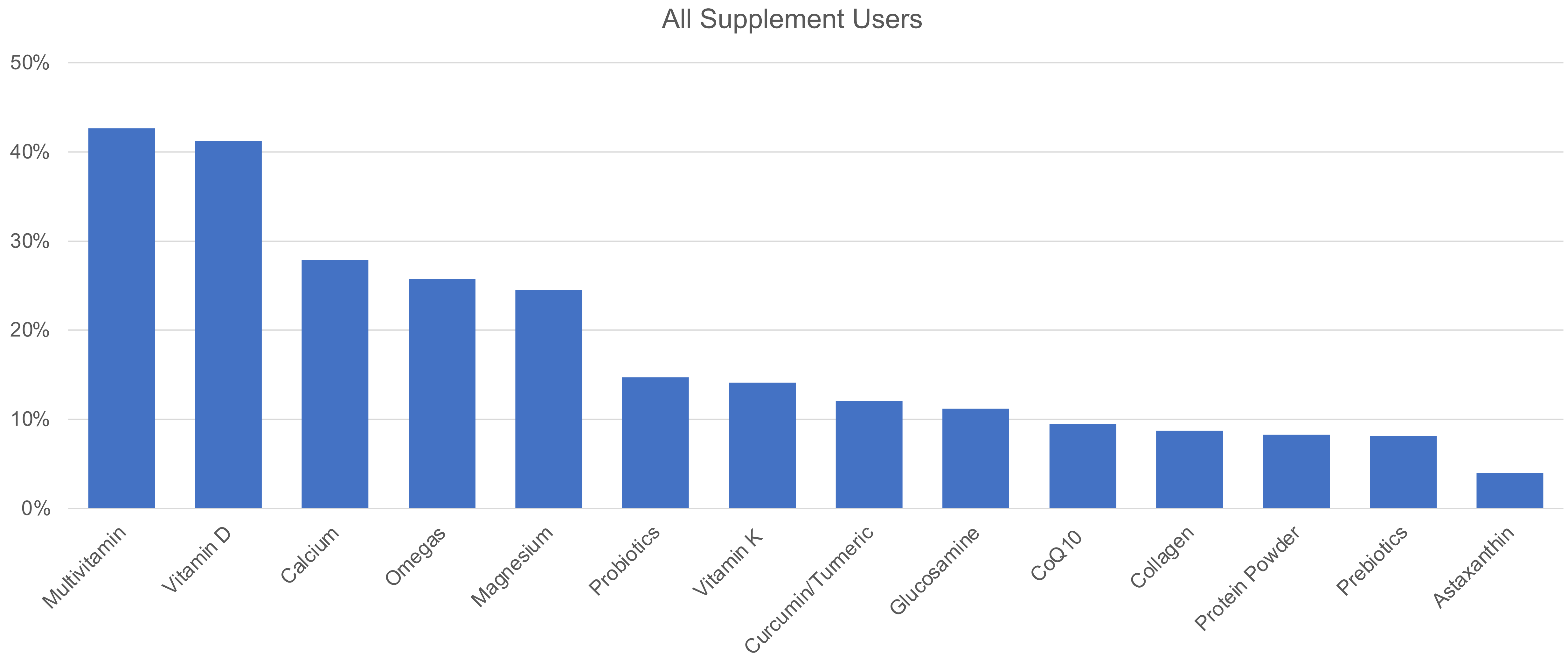
- Regular users are far more convinced of all supplements' effectiveness (or more likely those who are convinced of supplement effectiveness become regular users)
- Irregular users are likely to be trusting in effectiveness rather than having experienced benefits



Note: Regular Users of each supplement indicated using supplement at least 4 times per week. Question: "What is your opinion of the effectiveness/benefit of each of these supplements?"

CONSUMER SUPPLEMENT DATA: USAGE & SPEND

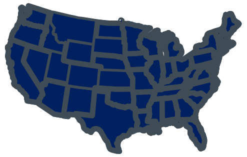
USAGE LEVELS



Note: All respondents n=2004. Top 2 Summary: “Daily” and “It’s in another supplement I take.” Question “Which of the following best describes how frequently you are taking the following supplements?”

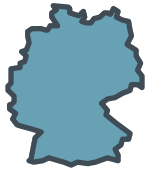
USAGE LEVELS: BY COUNTRY

KEY ITC INSIGHTS:
- UK consumers are above average users of omegas and glucosamine
- German consumers are above average users of multiple supplement types, including vitamin d, calcium, vitamin k, collagen, turmeric and magnesium – with the use of magnesium especially high compared to other countries

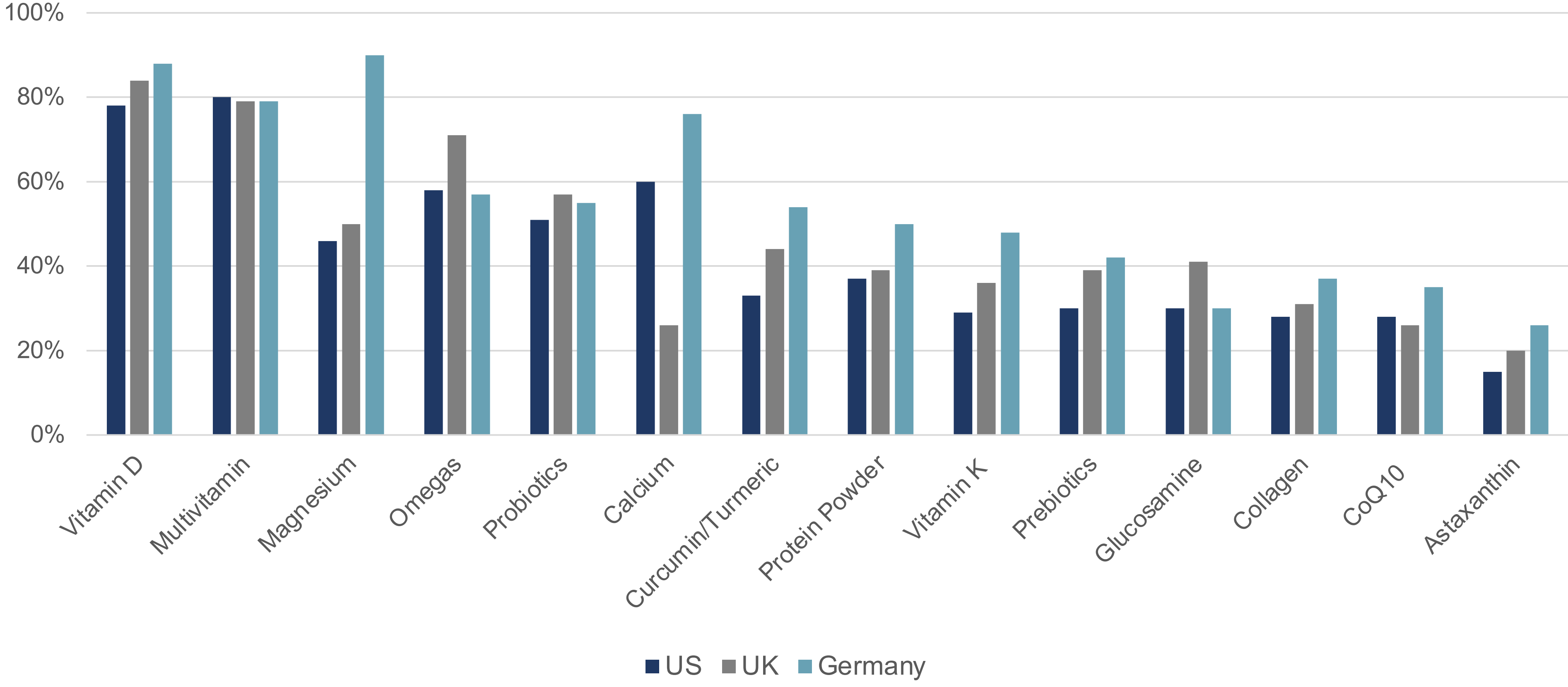


US Top 3 Supplements
- Multivitamin
- Vitamin D
- Calcium

UK Top 3 Supplements
- Vitamin D
- Multivitamin
- Omegas



Germany Top 3 Supplements
- Magnesium
- Vitamin D
- Multivitamin



Note: Regular users of each individual supplement indicated using supplement at least 4 times per week. Question "Which of the following best describes how frequently you are taking the following supplements?"

USAGE LEVELS: 2018-2020 (US DATA)

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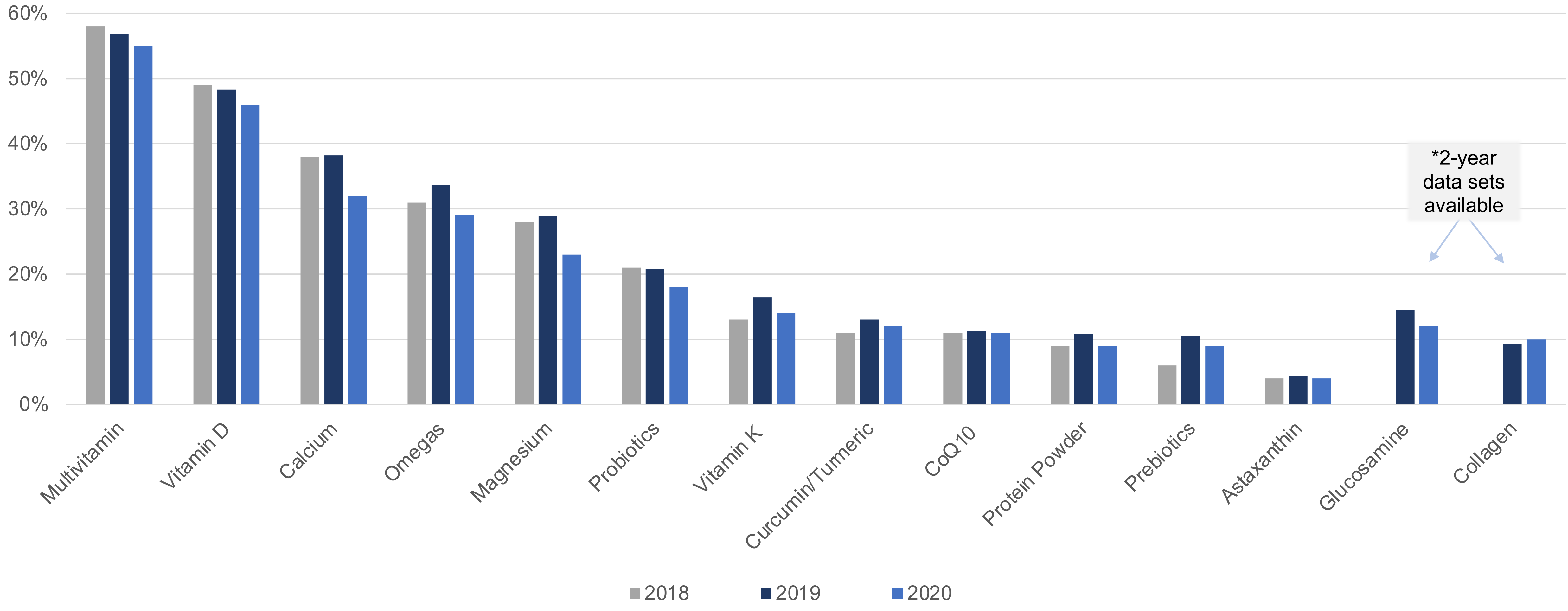
KEY ITC INSIGHTS:

- Usage of popular supplements including multivitamins and vitamin D continue to fall each year
- Use of certain ‘hot’ supplements including turmeric, prebiotics and collagen continues to grow (albeit from lower bases)



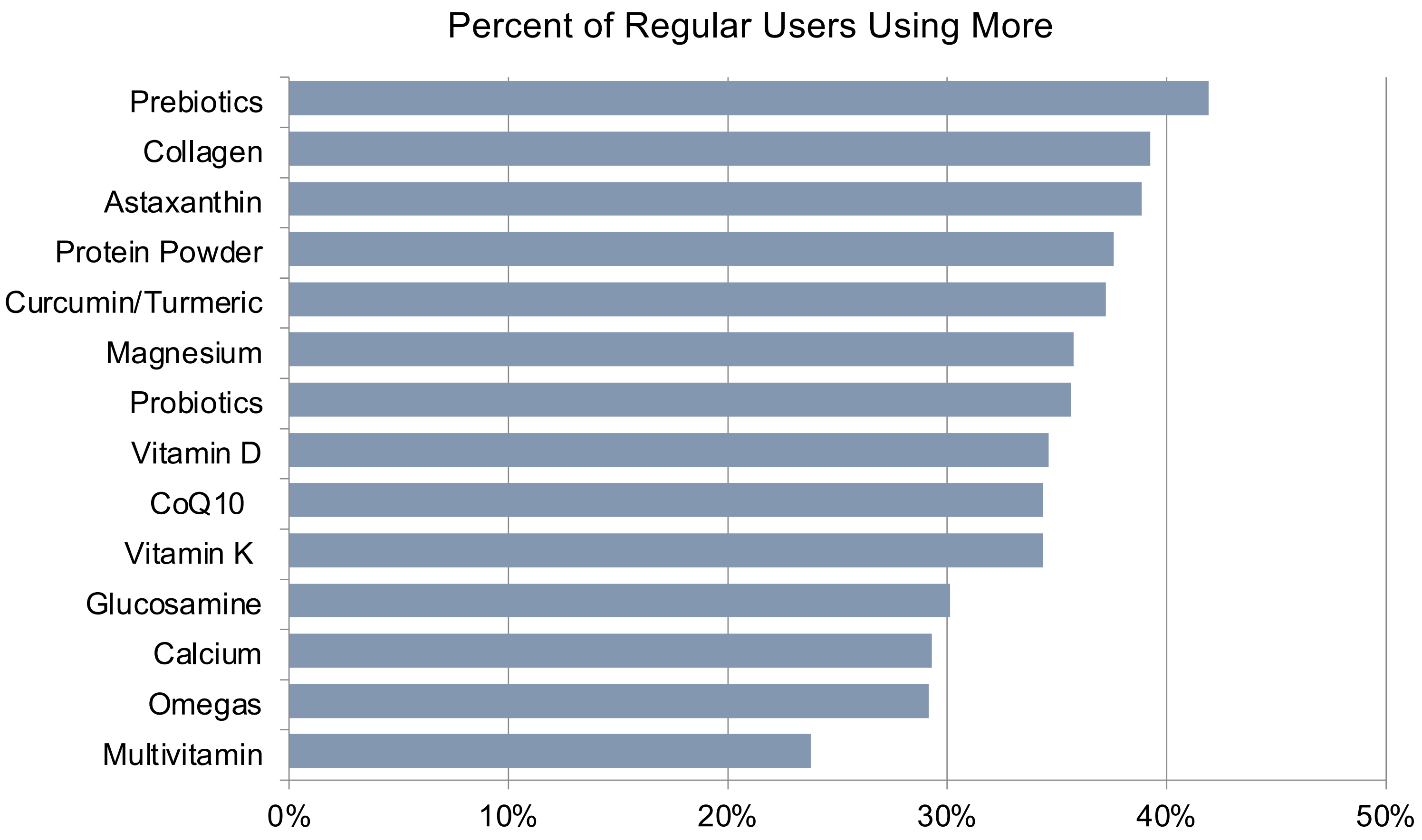
Question “Which of the following best describes how frequently you are taking the following supplements?” Info based on all US respondents.

CHANGE IN USAGE LEVELS

Many supplements are seeing increases in usage, especially among regular users

Usage levels are remaining steadier for supplements like multivitamins and omegas that have more established user bases

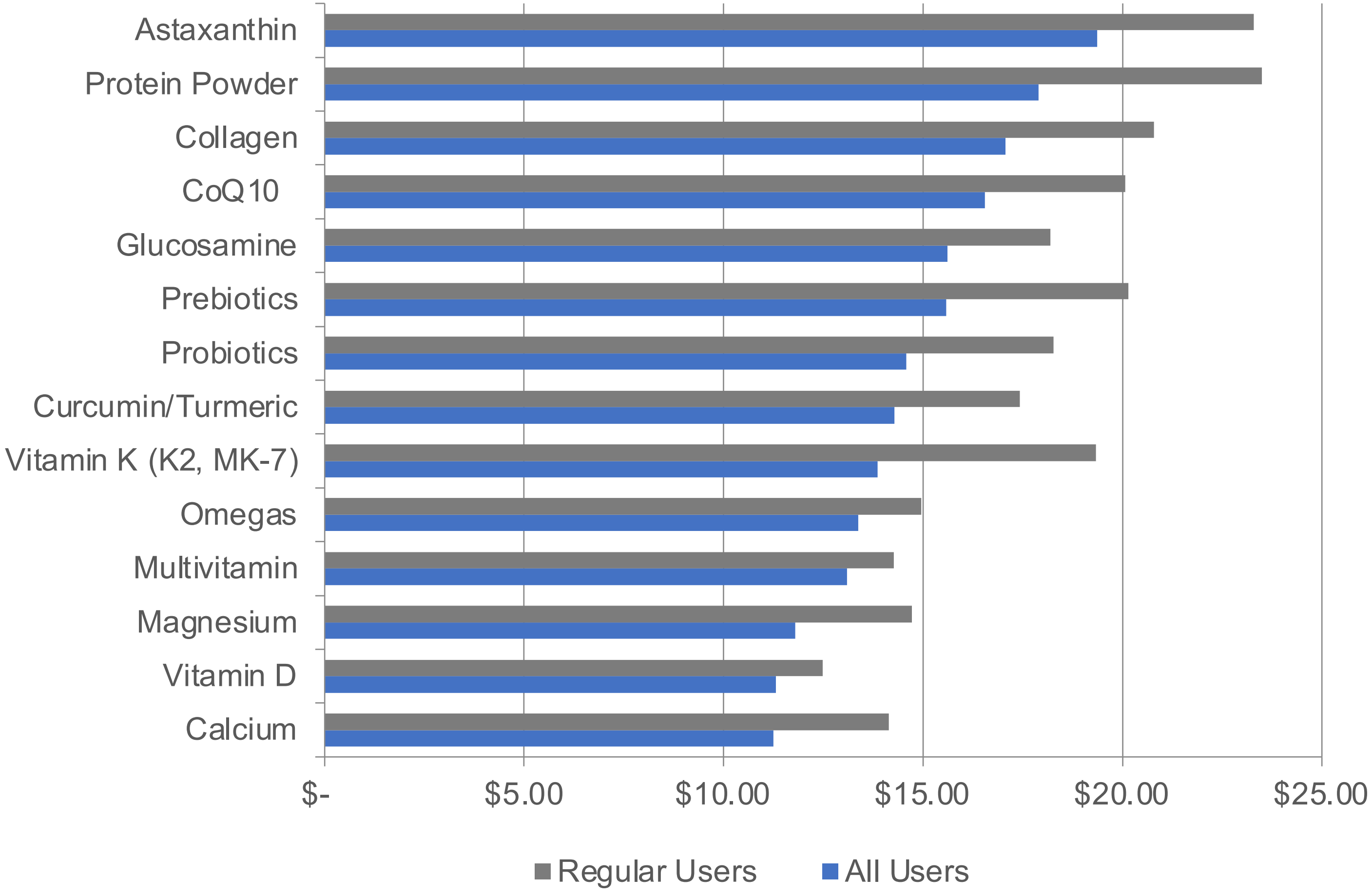
Prebiotics and collagen are recognized “hot” ingredients and increased usage follows this trend



Note: Regular users of each individual supplement indicated using supplement at least 4 times per week. Question “Which of the following best describes how your use of each of these supplements compares to your usage 1 year ago?”

AVERAGE MONTHLY SPEND

KEY ITC INSIGHTS:
- Regular users spend more per month on supplements than irregular users (46% more on average)
- While astaxanthin and collagen are used at lower rates, consumers are willing to spend significant amounts on them
- Protein powders, vitamin K, and prebiotics see the biggest change in spend between regular and irregular users

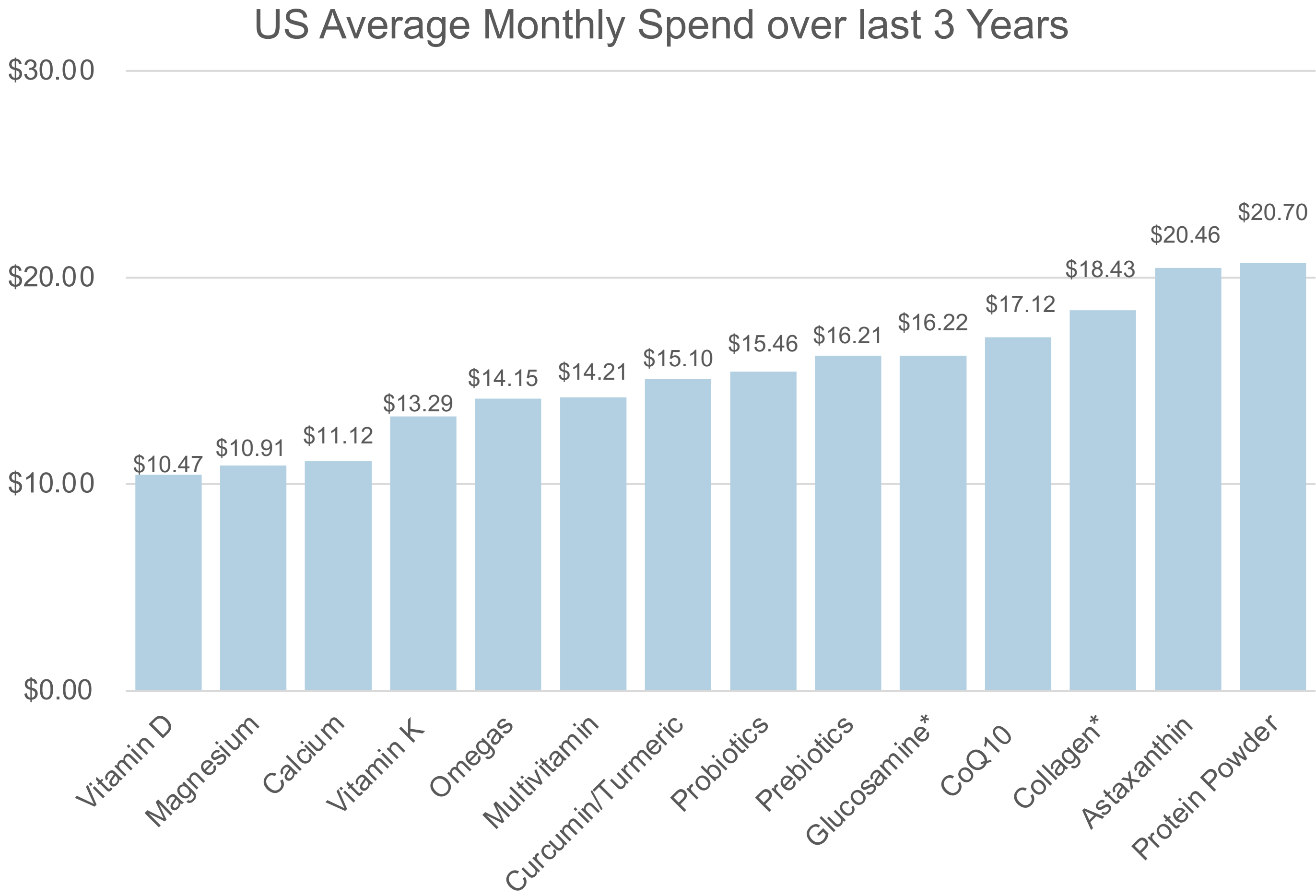


Biggest Change Between Users

	All Users	Regular Users ($)	Percent Increase
Protein Powder	$17.90	$23.50 (+$5.59)	31.2%
Vitamin K	$13.86	$19.34 (+$5.48)	39.5%
Prebiotics	$15.58	$20.15 (+$4.58)	29.4%
Astaxanthin	$19.37	$23.29 (+$3.92)	20.2%
Probiotics	$14.57	$18.28 (+$3.70)	25.4%
Collagen	$17.07	$20.79 (+3.71)	21.7%

**Converted to USD from original national currency*

AVERAGE MONTHLY SPEND

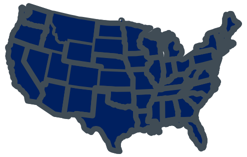


All US Users

	Spend difference between 2018 to 2020	Percent difference between 2018 to 2020
Vitamin D	+$1.89	20.5%
Magnesium	+$3.17	35.5%
Calcium	+$1.89	19.1%
Vitamin K (K2, MK-7)	+$3.31	31.4%
Omegas	+$1.62	12.4%
Multivitamin	+$0.50	3.7%
Curcumin/Turmeric	+$2.10	15.5%
Probiotics	+$1.06	7.3%
Prebiotics	+$2.23	15.6%
Glucosamine*	-$0.31*	1.9%*
CoQ10	+$1.40	9%
Collagen*	-$1.17*	5.6%*
Astaxanthin	+$1.48	8%
Protein Powder	-$1.61	7.7%

COVID-19 IMPACT

CHANGE DUE TO COVID-19

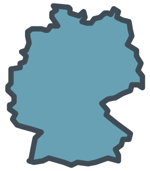


US Top 3 Supplements

- Vitamin D
- Multivitamin
- Omegas

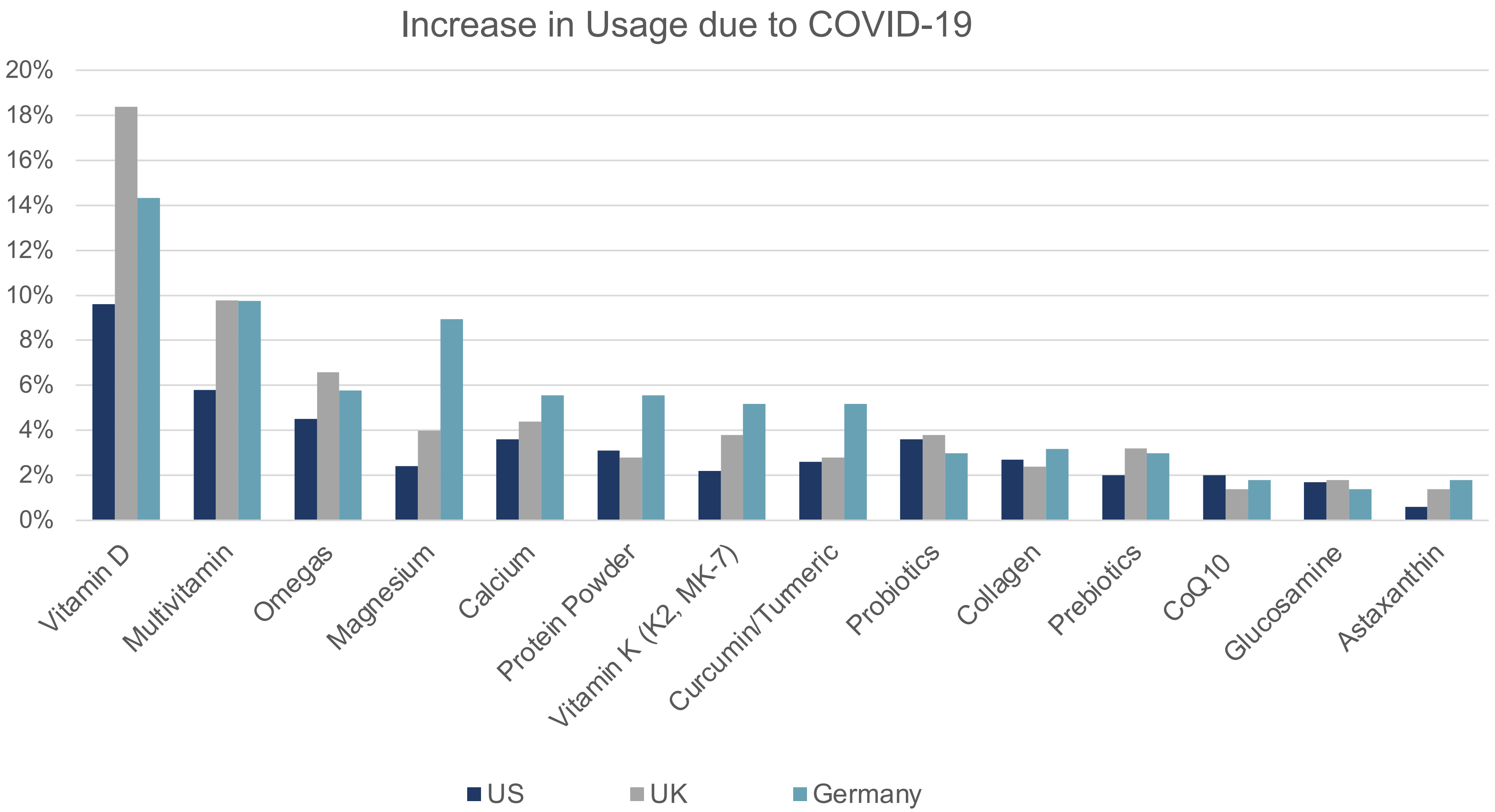
UK Top 3 Supplements

- Vitamin D
- Multivitamin
- Omegas



Germany Top 3 Supplements

- Vitamin D
- Multivitamin
- Magnesium



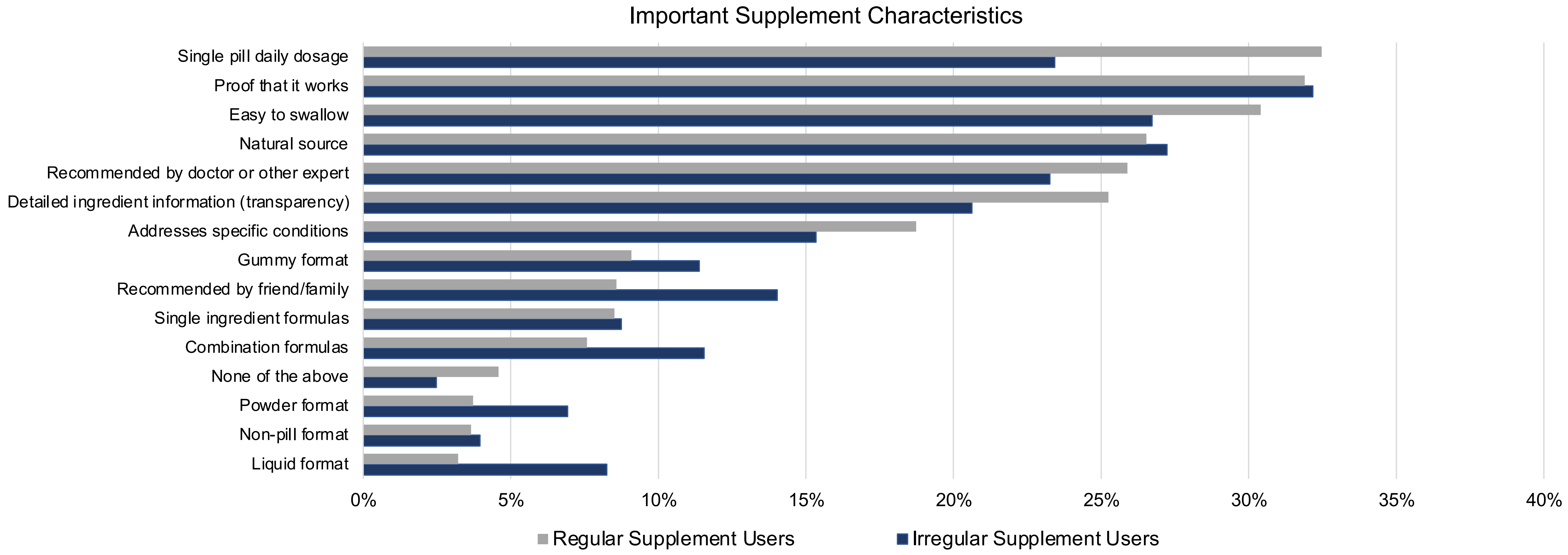
Question: “Have you increased your usage of any of these supplements due to COVID-19 (coronavirus) concerns?”

PURCHASE DRIVERS & VALUES

SUPPLEMENT SELECTION CRITERIA

KEY ITC INSIGHTS:

- Single pill daily dosage, proof of efficacy, easy to swallow, and natural source are all top characteristics
- There is no one characteristic that is important to all supplement users, and importance doesn't change much for regular vs. irregular users



Note: Regular users indicated using supplements in general at least 4 times per week. Question: "Which of the following characteristics are most important when choosing which supplement product to purchase?"

SUPPLEMENT FORMAT PREFERENCES

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Regular Users Preference

- Single Pill 32%
- Gummy 9%
- Powder 4%
- Liquid 3%

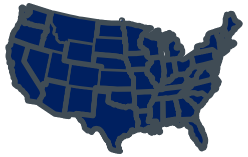
VS.

Irregular Users Preference

- Single Pill 23%
- Gummy 11%
- Liquid 8%
- Powder 7%

*Info based on all respondents

SUPPLEMENT SELECTION CHARACTERISTICS

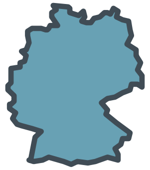


US Top 3

- Single pill dose
- Easy to swallow
- Proof it works

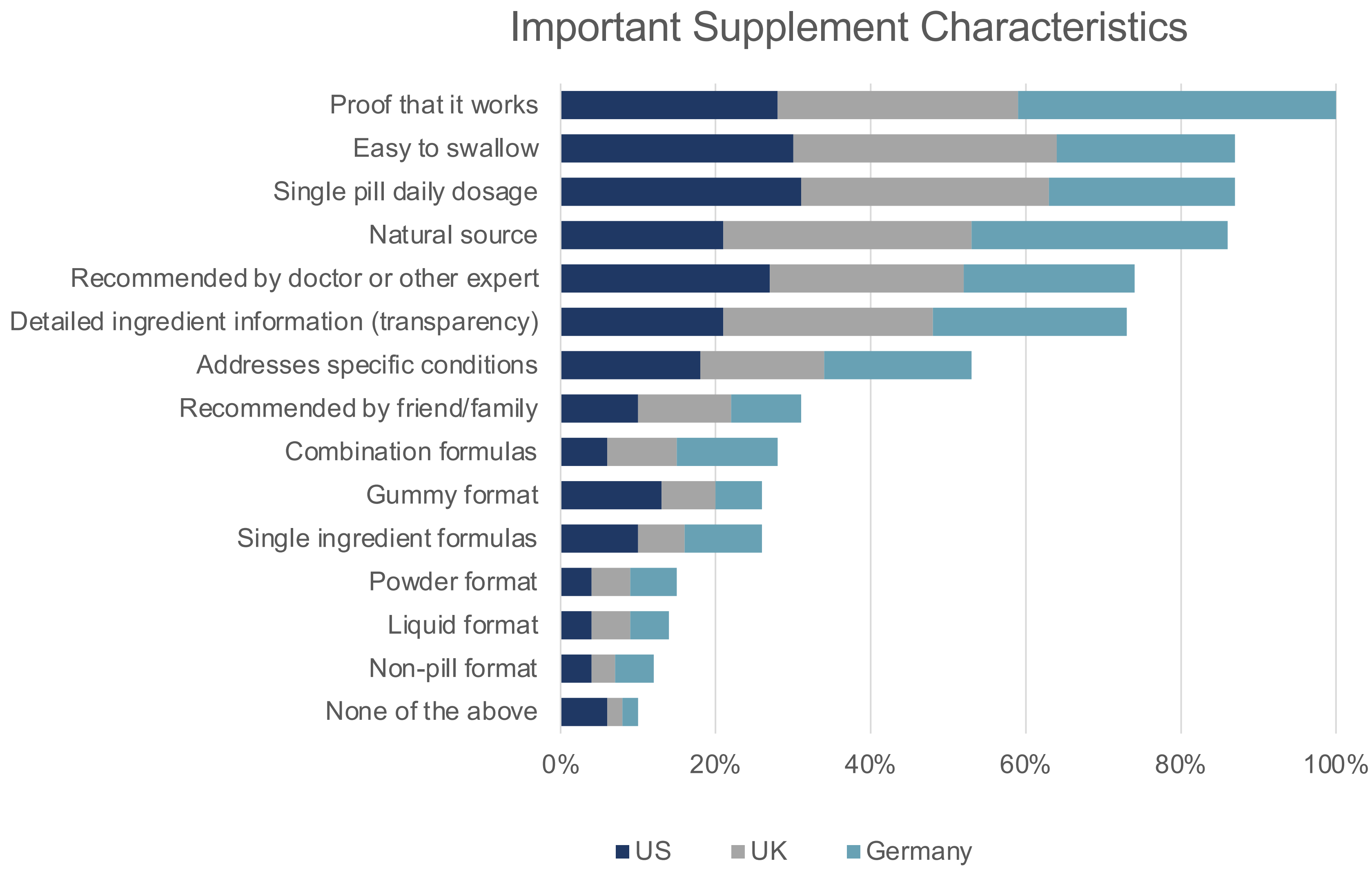
UK Top 3

- Easy to swallow
- Single pill dose
- Natural source



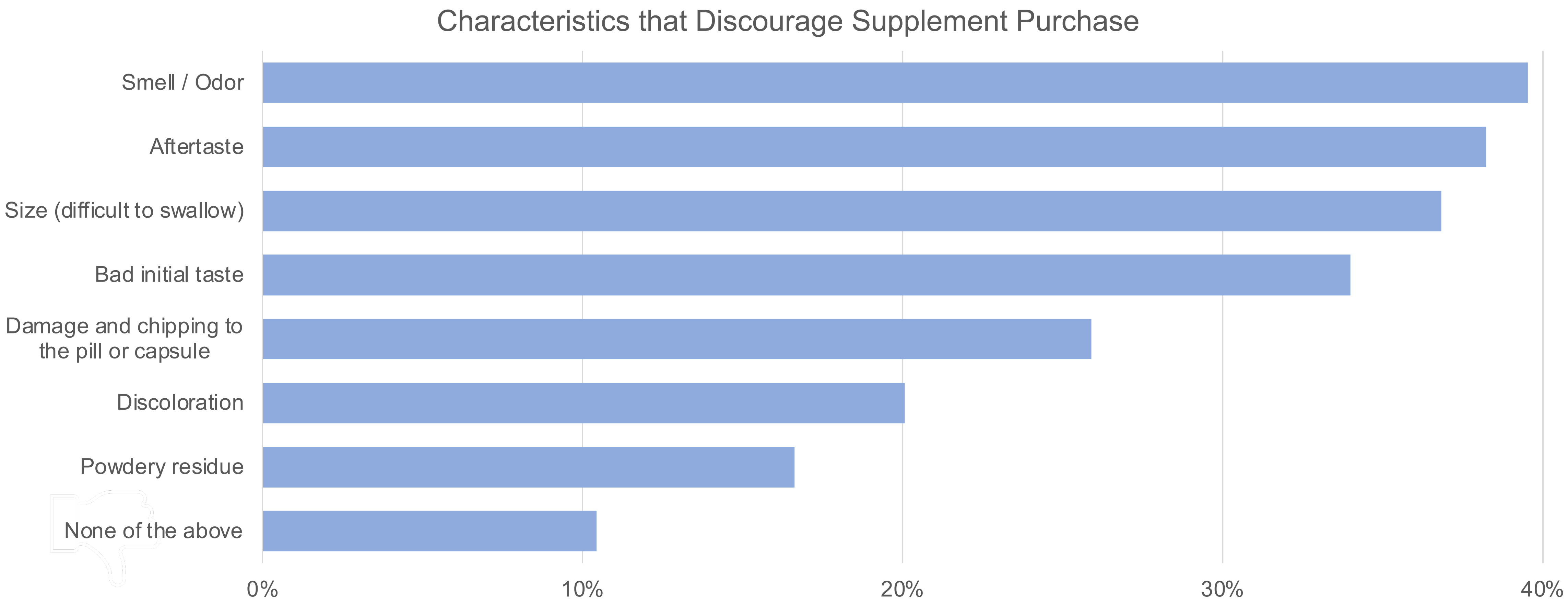
Germany Top 3

- Proof it works
- Natural Source
- Detailed ingredient info (transparency)



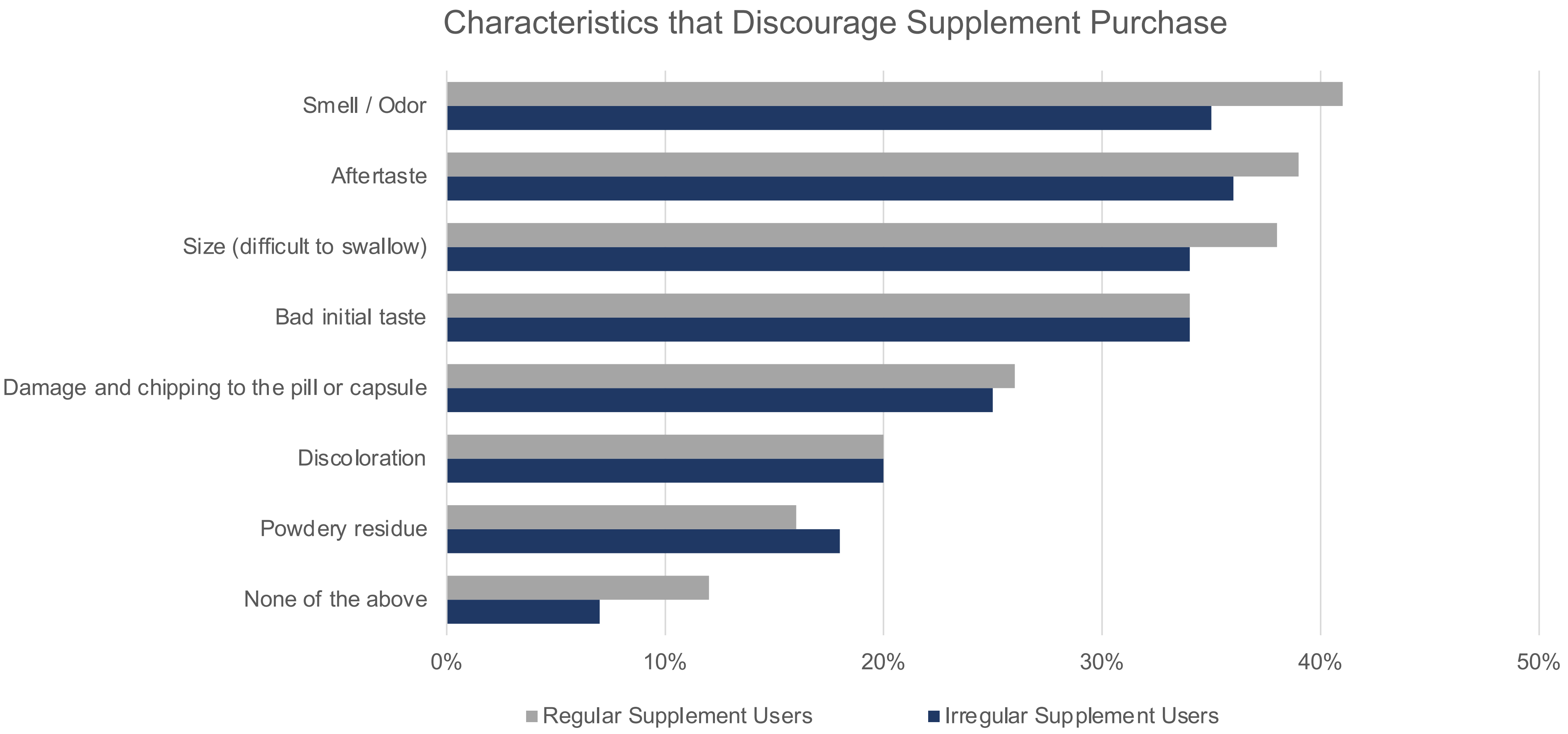
Question: "Which of the following characteristics are most important when choosing which supplement product to purchase?"

FACTORS DISCOURAGING PURCHASE



Note: All respondents N=2004. Question: “Which of these characteristics are most likely to discourage you from purchasing/repurchasing a supplement product or brand?”

DISCOURAGING PURCHASE



Note: Regular users indicated using supplements in general at least 4 times per week. Question: “Which of these characteristics are most likely to discourage you from purchasing/repurchasing a supplement product or brand?”

DISCOURAGING PURCHASE

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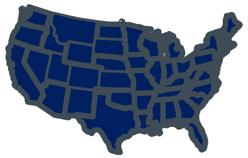
KEY ITC INSIGHTS:

- Bad tastes and smells can be the most off-putting characteristics of supplements
- Regular Users in UK and US care much more about odor (45% and 40%) than those in Germany (33%)

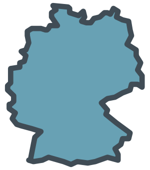


US Top 3

- Smell/ Odor
- Size
- Aftertaste

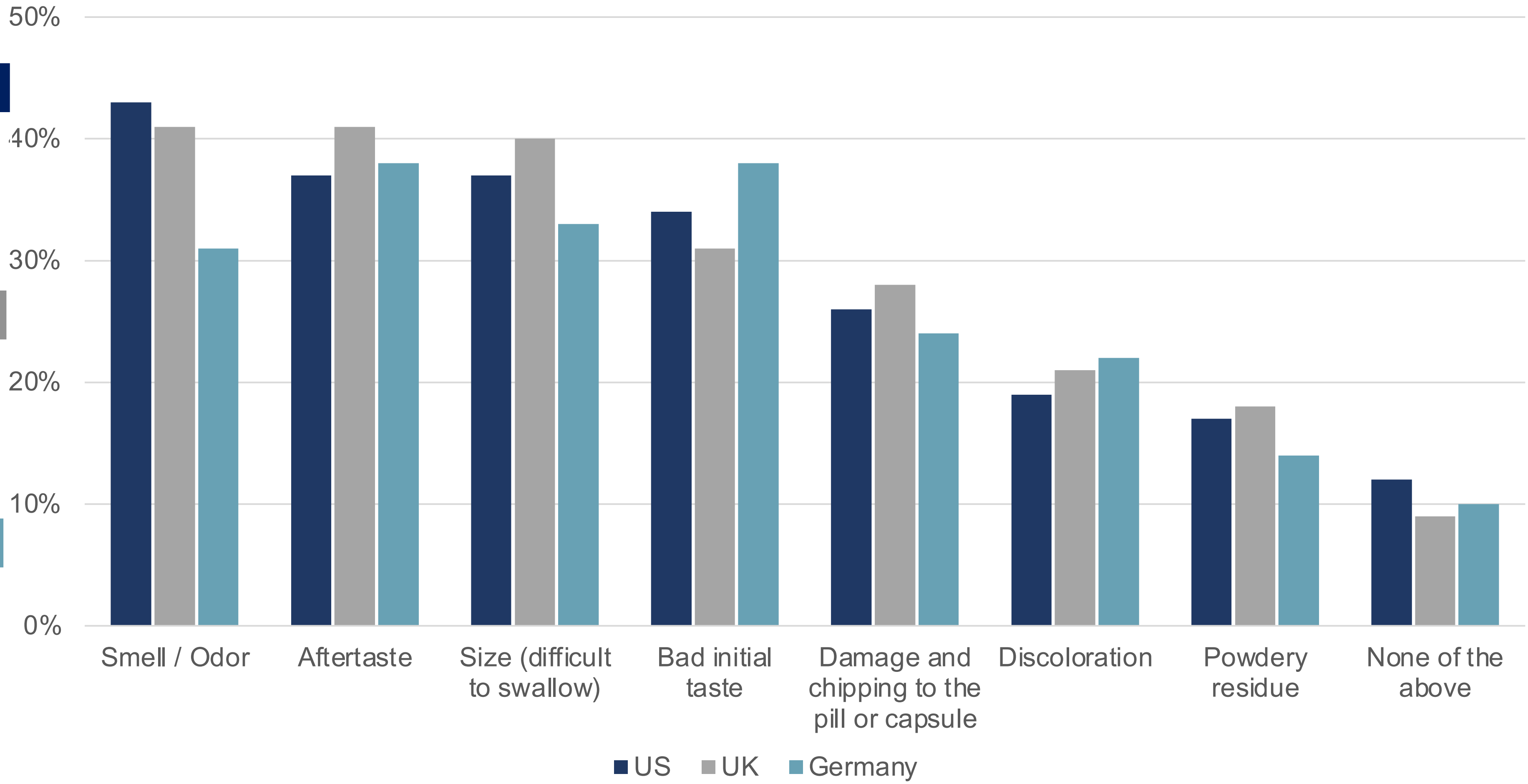
UK Top 3

- Aftertaste
- Smell/ Odor
- Size



Germany Top 3

- Bad initial taste
- Aftertaste
- Size

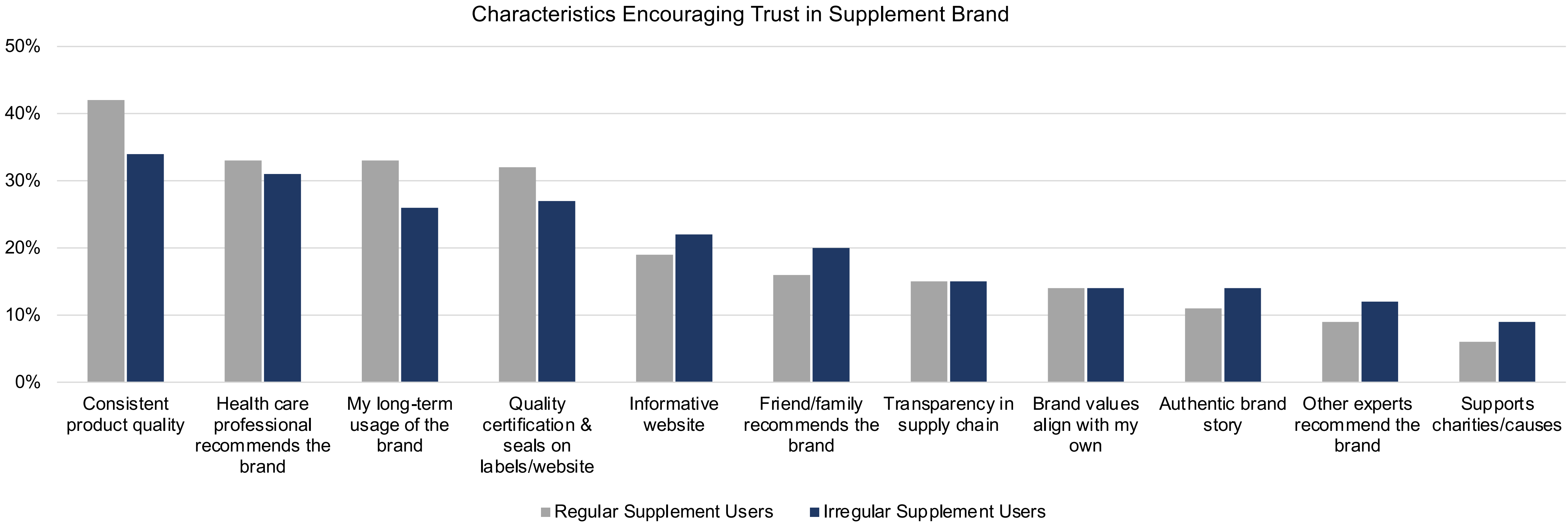


Question: "Which of these characteristics are most likely to discourage you from purchasing/repurchasing a supplement product or brand?"

REASONS FOR TRUST

KEY ITC INSIGHT:

- Consistent product quality is the biggest driver of trust, especially for regular users (42%)

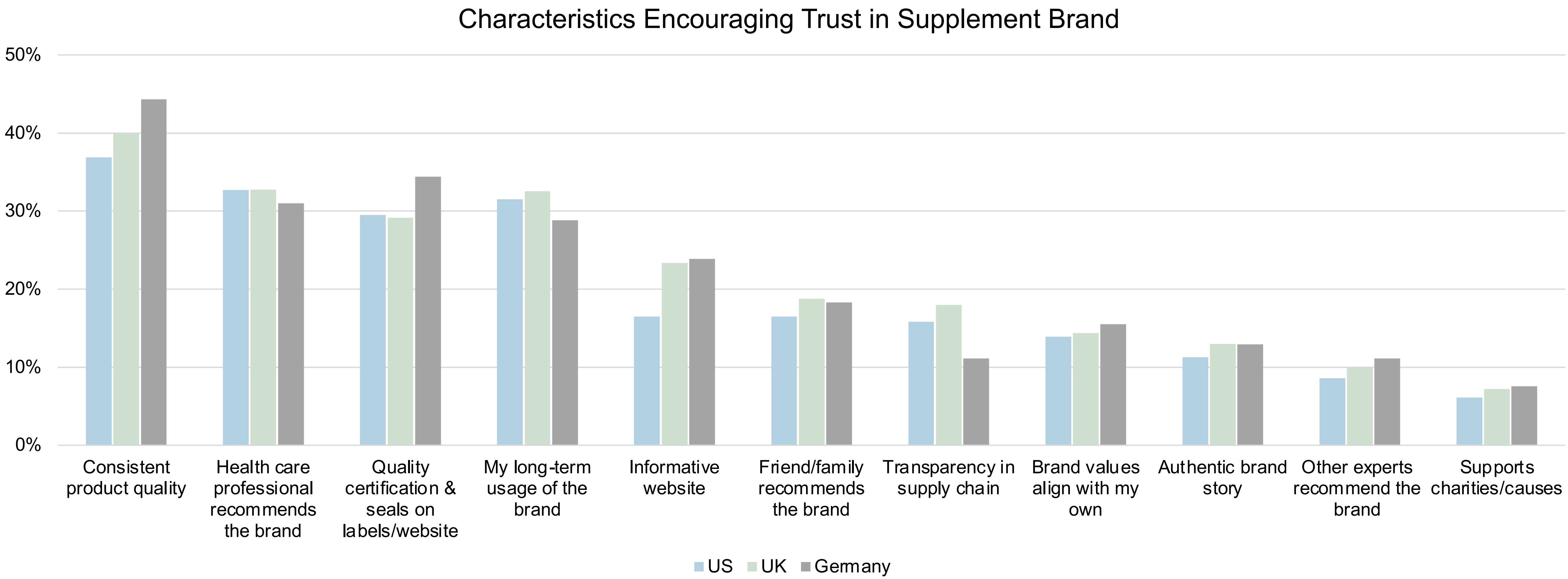


Note: Regular users indicated using supplements in general at least 4 times per week. Question: “What characteristics most encourage you to trust a supplement brand?”

REASONS FOR TRUST

KEY ITC INSIGHTS:

- Consistent product quality is the leading reason across all countries
- German regular users appreciate quality certifications and seals (39%) more than those in UK (29%) and US (31%)



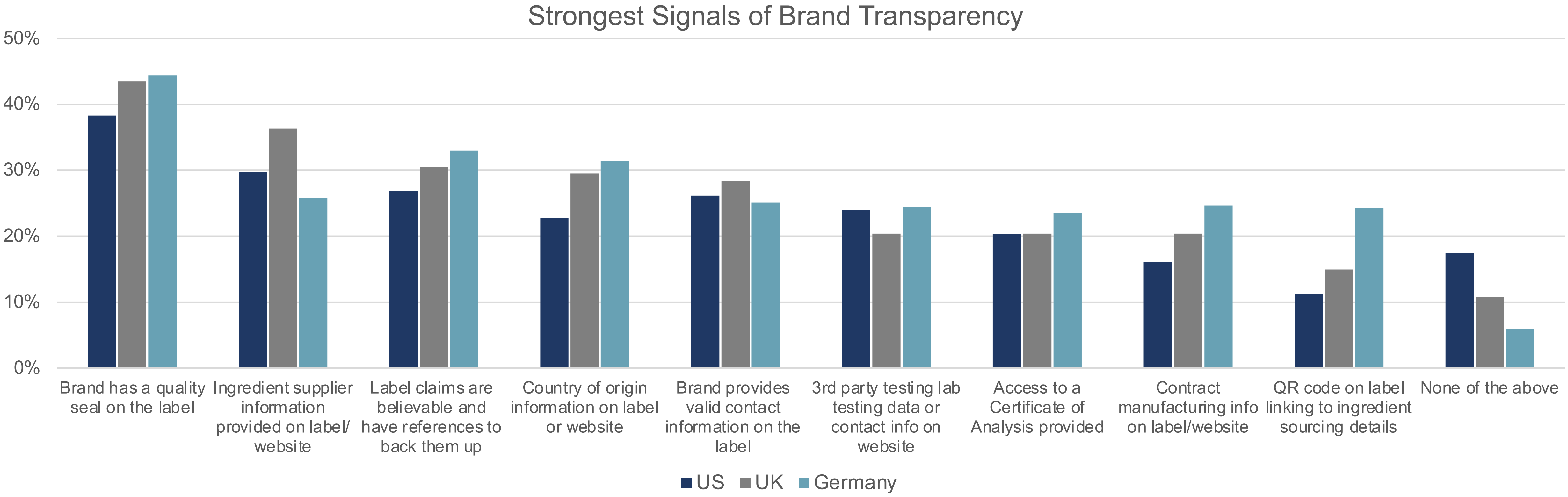
Question: "What characteristics most encourage you to trust a supplement brand?"

SIGNALS OF BRAND TRANSPARENCY

TRUST TRANSPARENCY CENTER

KEY ITC INSIGHTS:

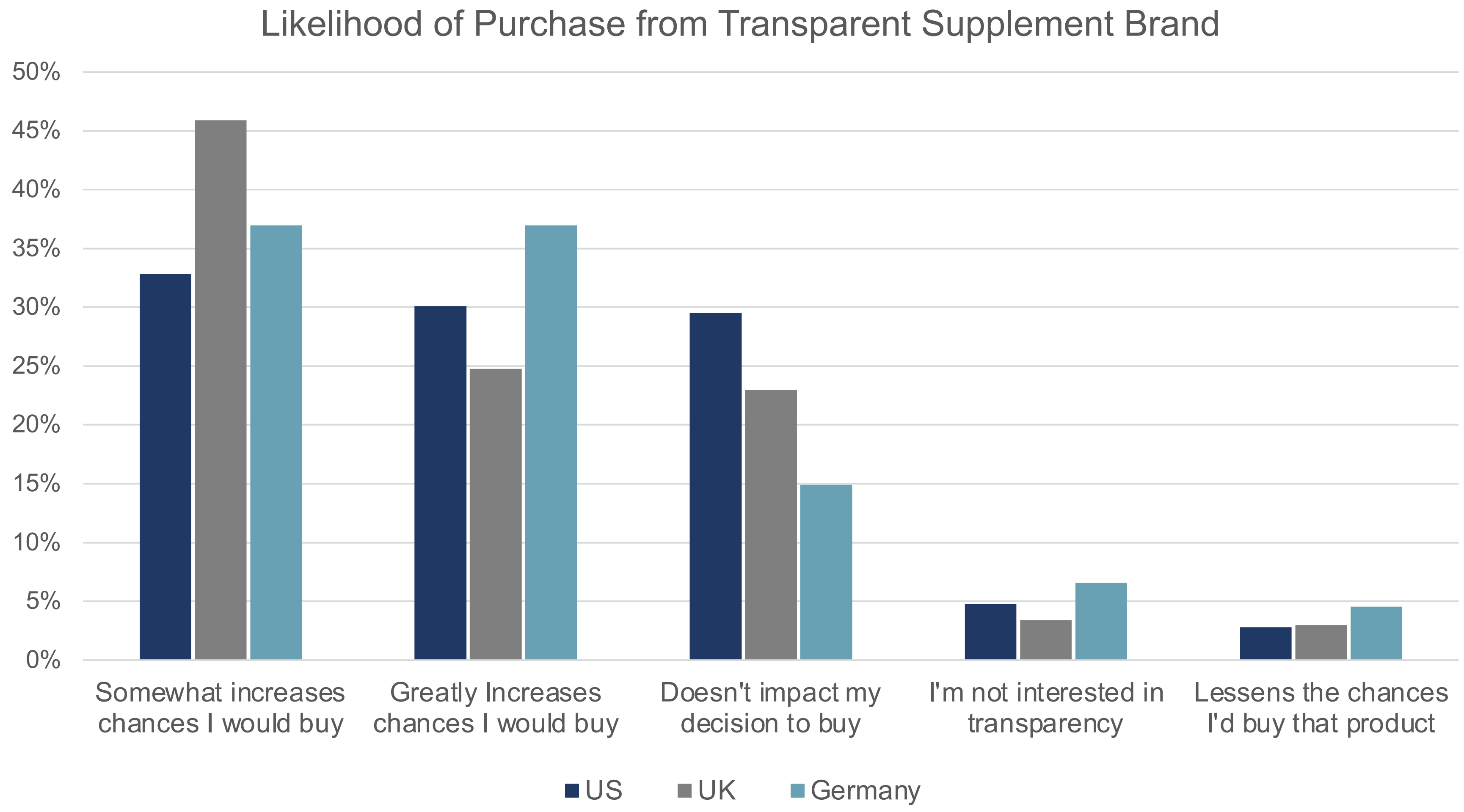
- Quality seals on the label are clearly important to all consumers
- Regular users in Germany are most appreciative of transparency signals, with US consumers least excited, and UK falling in the middle
- Ingredient supplier information is especially appreciated by regular users in the UK (40%)



Note: Regular users indicated using supplements in general at least 4 times per week. Question: “Which of the following items are the strongest signals that a supplement brand is operating transparently?”

TRANSPARENCY: PURCHASE INFLUENCE

KEY ITC INSIGHTS:
- Transparency clearly encourages consumers to purchase a brand (especially regular users)
- 44% of regular users in Germany say transparency would greatly increase the chances of buying a brand (vs. 28% UK and 31% US)

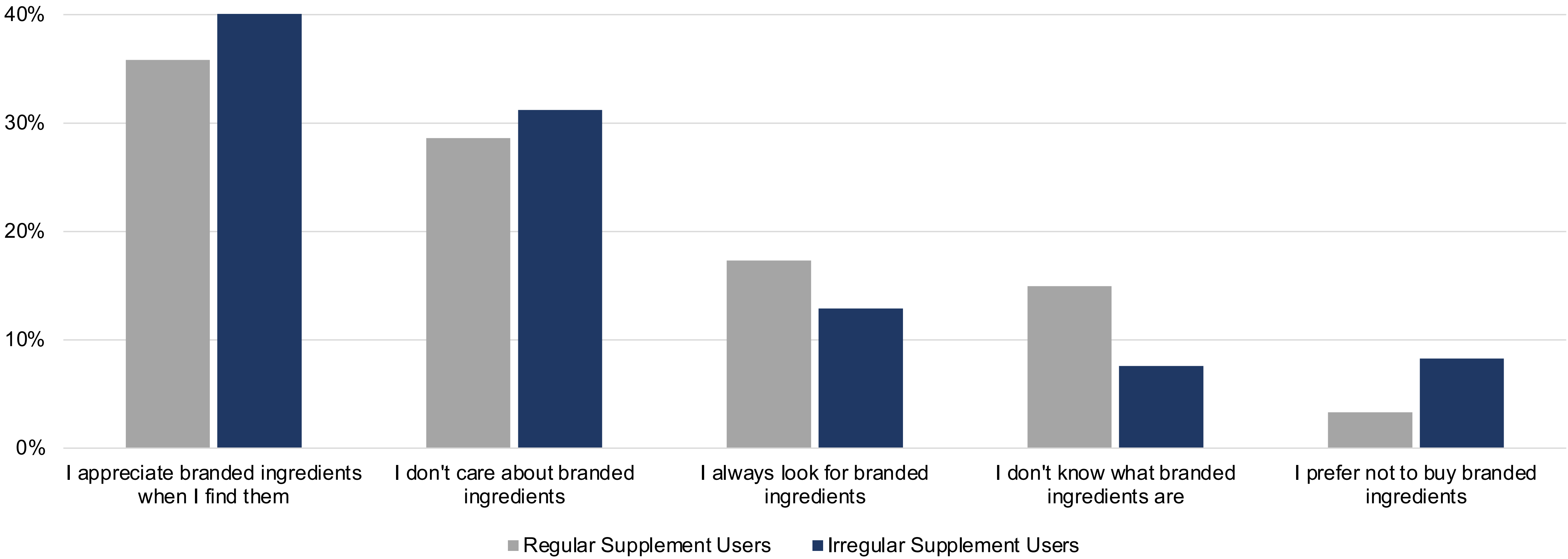


Question: How likely are you to purchase supplements from a manufacturer that provides transparency information on its label or website?

IMPORTANCE OF BRANDED INGREDIENTS

KEY ITC INSIGHTS:

- Knowledge that branded ingredients exist is strong (very few do not know what a branded ingredient is)
- Most supplement users do not search out branded ingredients, but many do appreciate them when they find them

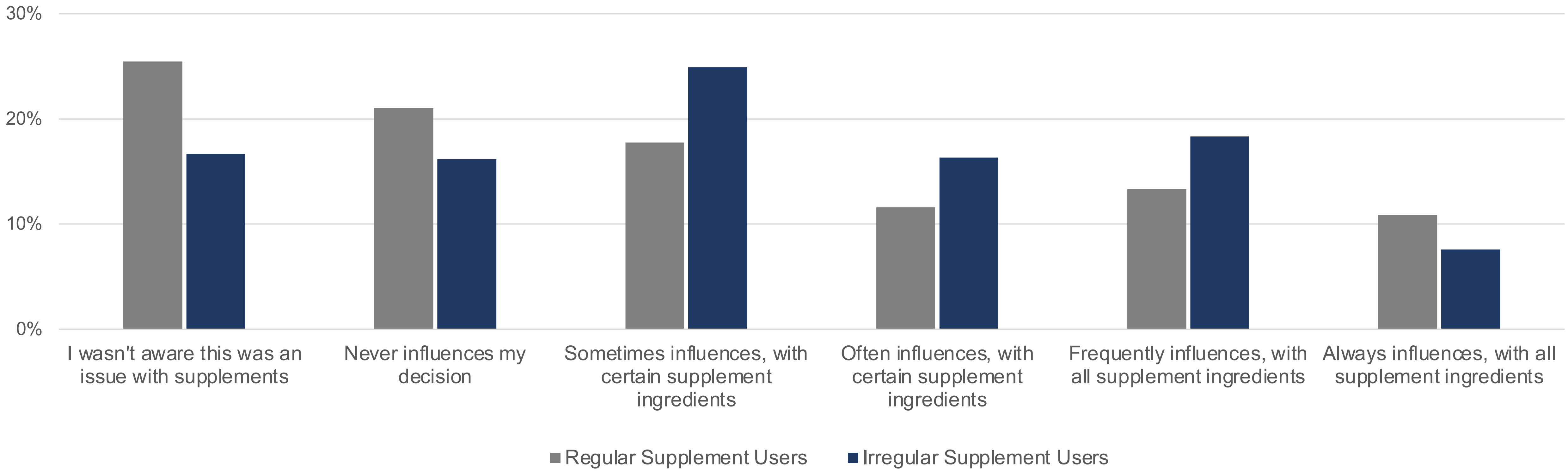


Note: Regular users indicated using supplements in general at least 4 times per week. Question: “When deciding which supplements to purchase, how important is the inclusion of branded or proprietary ingredients?”

IMPORTANCE OF SUSTAINABILITY

KEY ITC INSIGHTS:

- Sustainability is not considered an important consideration for the majority of supplement users.
- Many are unaware that supplements have sustainability issues
- Sustainability is a bigger consideration for Irregular users
- Regular users may be more loyal to specific brands and therefore may not consider sustainability as a driver of purchase

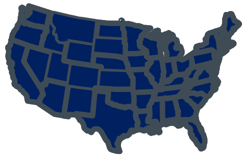


Note: Regular users indicated using supplements in general at least 4 times per week. Question: “When deciding which supplements to purchase, to what degree does the sustainability/environmental impact of a supplement ingredient influence your purchasing decision?”

IMPORTANCE OF SUSTAINABILITY

KEY ITC INSIGHTS:

- US consumers are less aware of sustainability issues concerned with supplements
- German consumers are the most influenced by sustainability issues

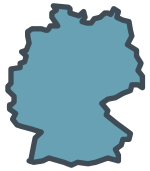


US Top 3

- Wasn’t aware 27%
- Never influences 22%
- Sometimes influences 20%

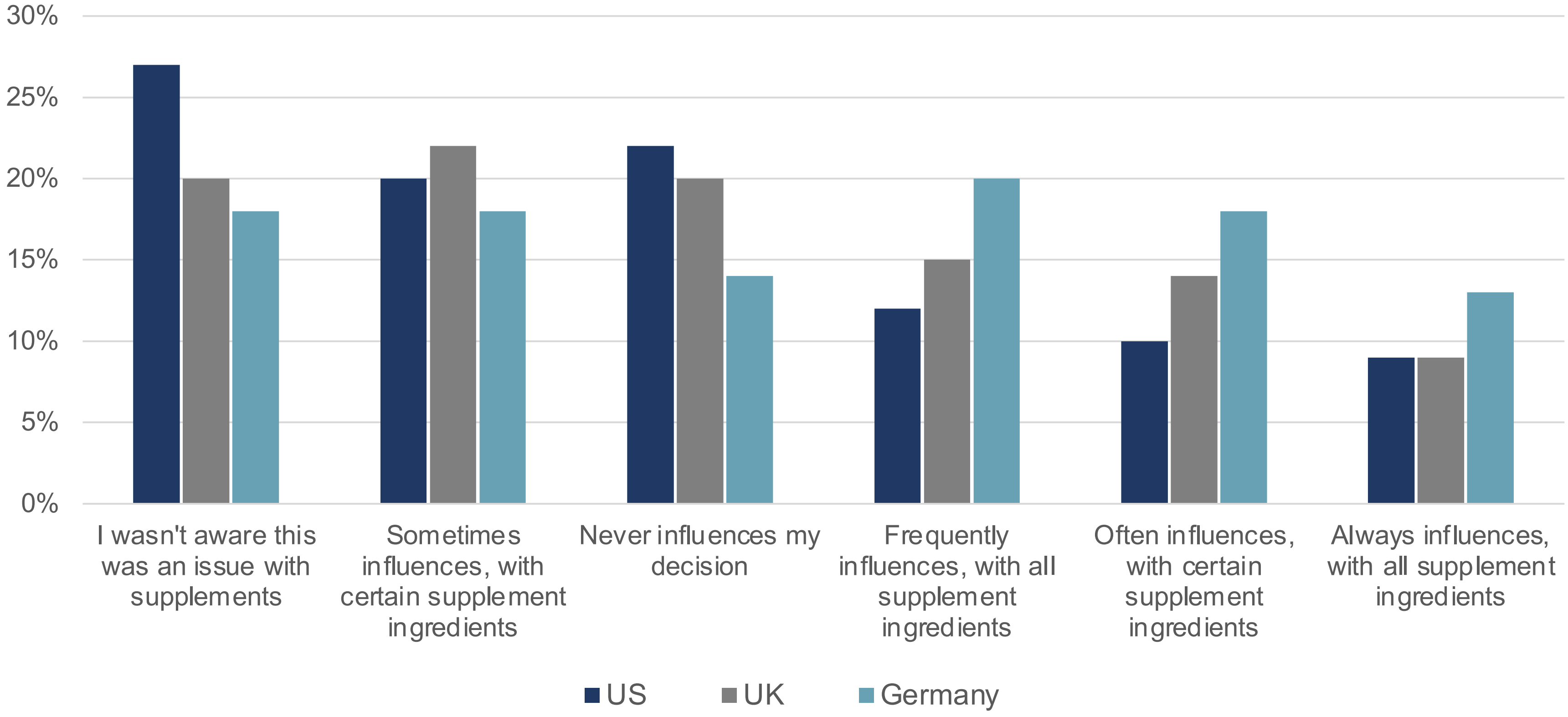
UK Top 3

- Sometimes influences 22%
- Never influences 20%
- Wasn’t aware 20%



Germany Top 3

- Frequently influences 20%
- Sometimes influences 18%
- Often influences 18%



Question: “When deciding which supplements to purchase, to what degree does the sustainability/environmental impact of a supplement ingredient influence your purchasing decision?”

TRENDS OVERVIEW: EDUCATION NEED

- 2020 data shows consumer usage trends between the US, UK, and Germany are often quite similar, however we see important differences in 'reason for use' – suggesting different drivers and understanding of benefits
- There is a clear need for better consumer education at all usage levels
- Differences in the perceived benefits of supplement types across countries highlights the importance of consumer education, which clearly drives higher usage for a wide array of reasons
- Media coverage and consumer education can quickly raise the bar on supplement awareness, knowledge, and usage;
  - ✓ Vitamin d is a poster child in this area
  - ✓ Turmeric & curcumin are on the journey
  - ✓ Categories like astaxanthin have a long way to go
- Regular users can serve as prime examples of how education and experience leads to loyal customers; there is a 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

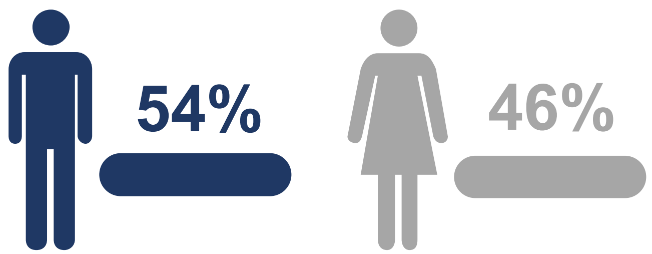
CONSUMER SUPPLEMENT DATA: COQ10-SPECIFIC

COQ10 USER DEMOGRAPHICS

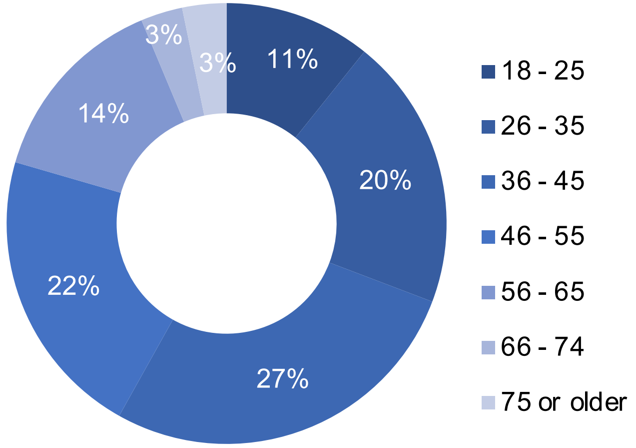
KEY ITC INSIGHTS:

- Regular users vs. irregular users
    - Equally likely to be male or female
    - More likely to be 56 or older (27% vs. 15%), especially in US (37% vs. 16%
    - Less ethnically diverse (74% vs. 66% white)

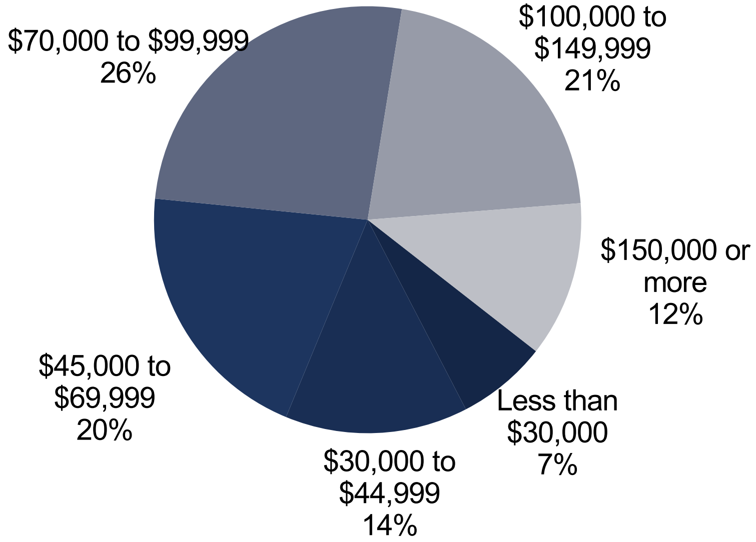
GENDER



AGE



INCOME

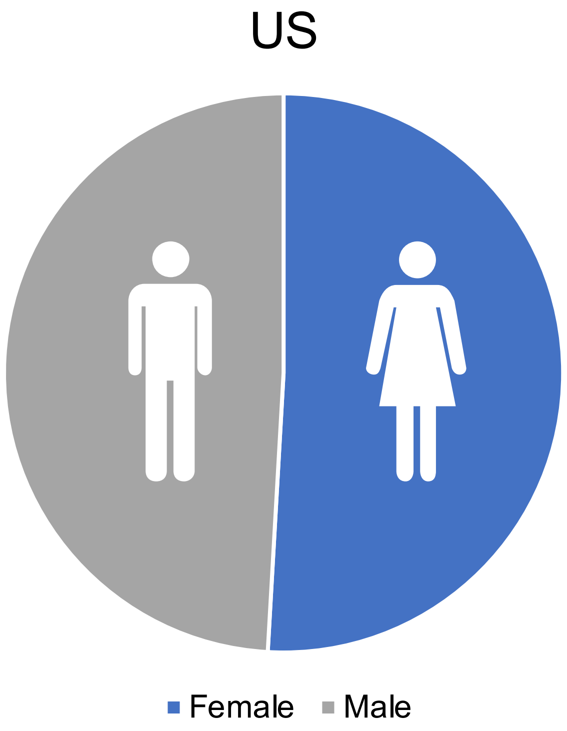


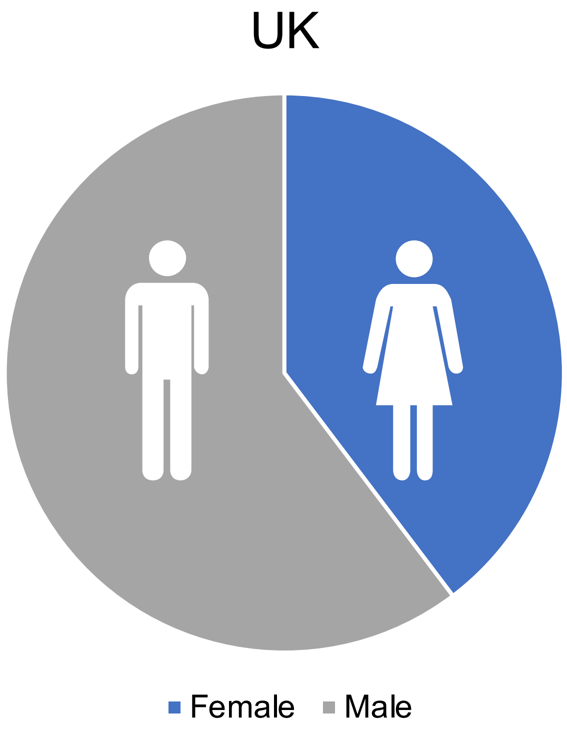
Note: CoQ10 users n=585.

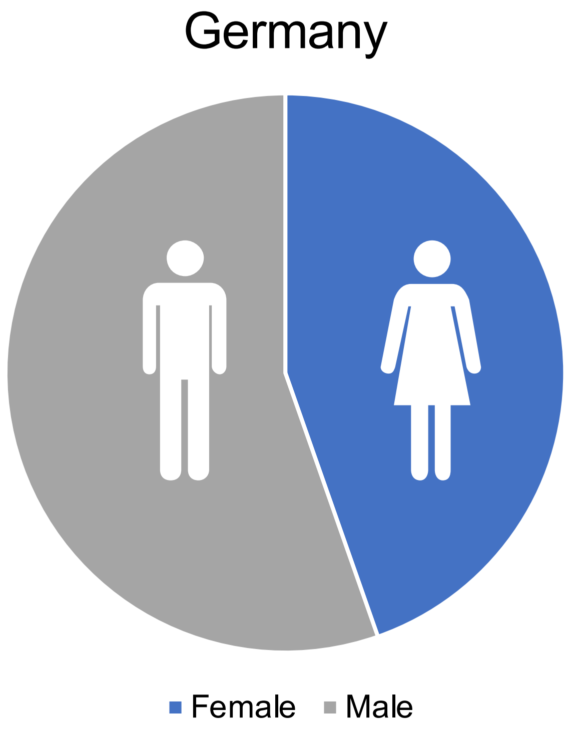
COQ10 USER: GENDER DEMOGRAPHICS

KEY ITC INSIGHT:

- The proportion of female CoQ10 users is higher in UK (60% male vs. 40% female) whereas users in the US or Germany are closer to 50:50

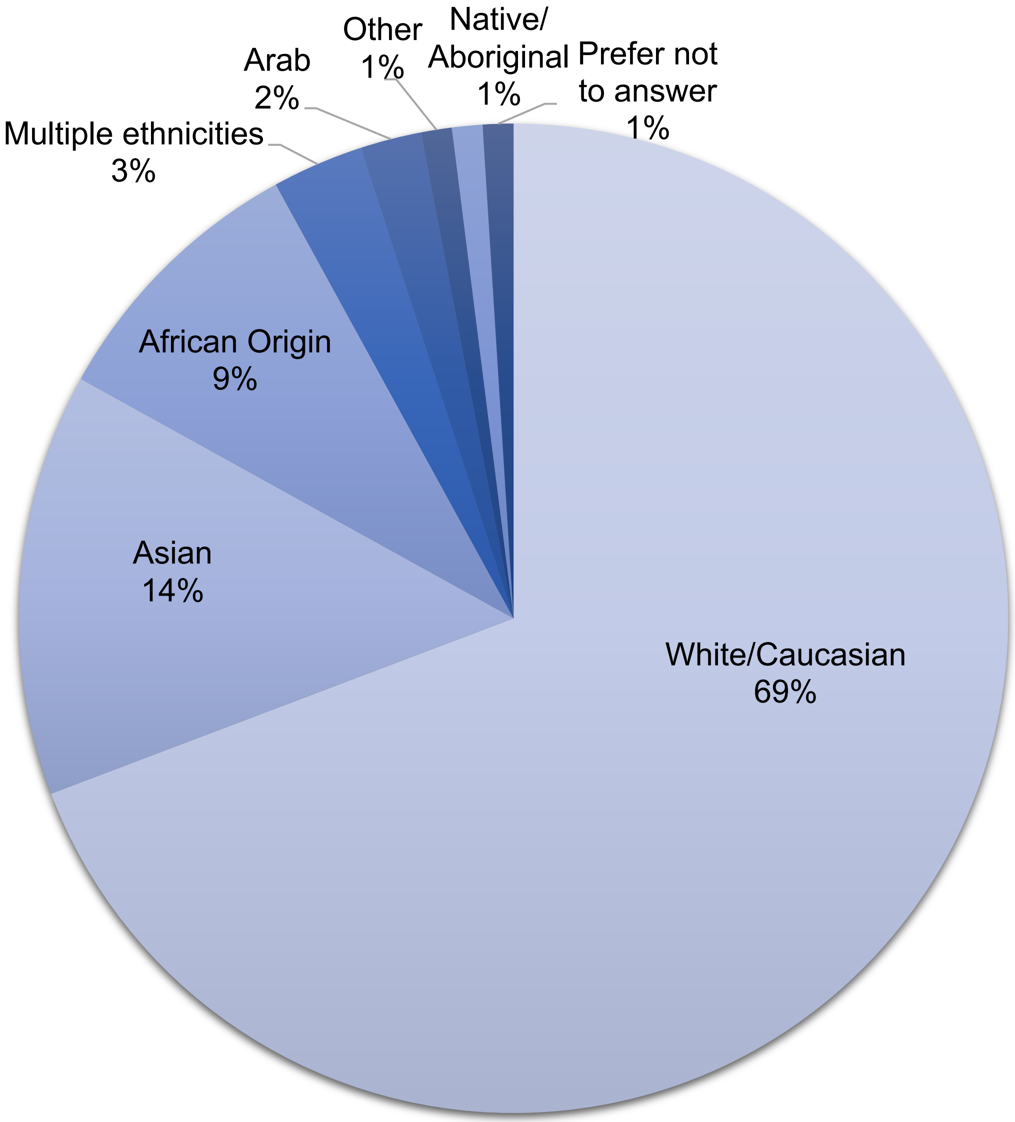






Note: US users n=277, UK users n=131, German users n=177. Question: “How do you identify your gender?”

ETHNIC BACKGROUND

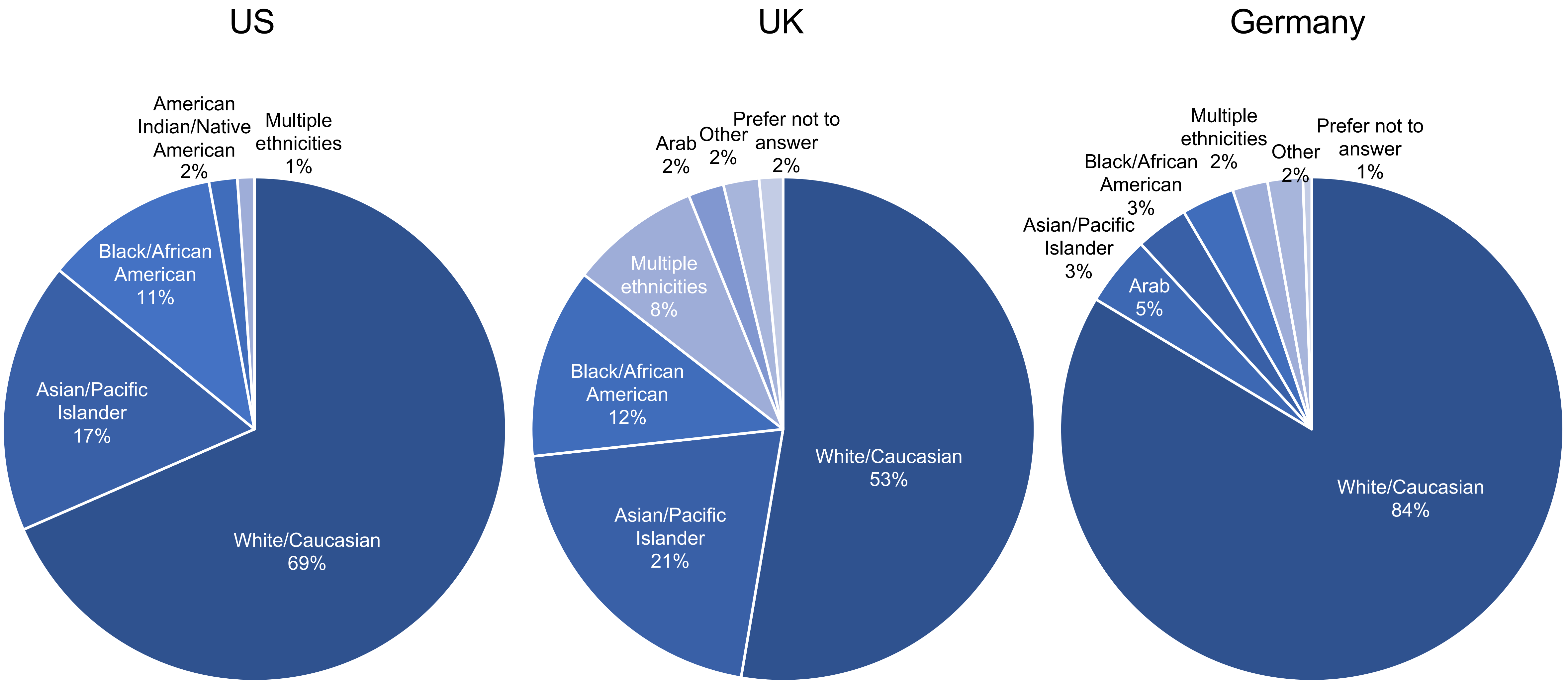


KEY ITC INSIGHTS:

- CoQ10 consumers are slightly more ethnically diverse than all supplement users
- 33% of users in the UK are Asian, much higher than for the other two countries
- Two thirds of the consumers in the US are Caucasian

CoQ10 users n=585. Question: "How do you identify your primary ethnicity origin/race?"

ETHNIC BACKGROUND

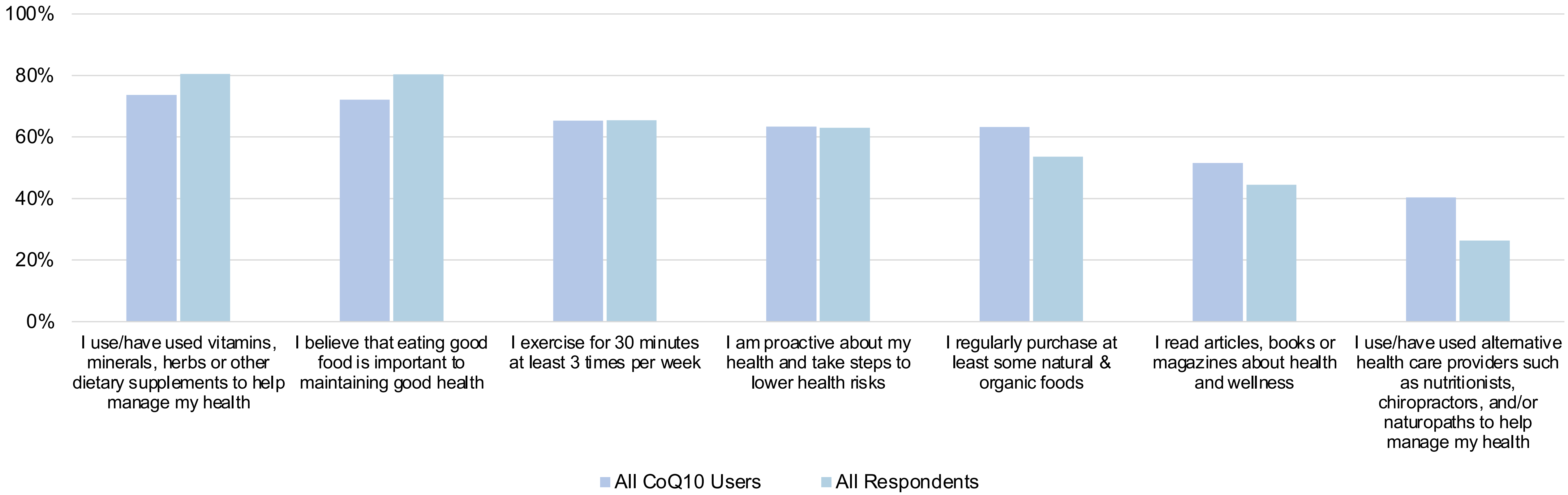


Note: US users n=277, UK users n=131, German users n=177. Question: “How do you identify your primary ethnicity origin/race?”

HEALTH BEHAVIORS: COQ10 USERS VS. ALL SUPPLEMENT USERS

KEY ITC INSIGHT:

- CoQ10 over indexes in reading and buying natural and organic, along with seeing alternative health care providers

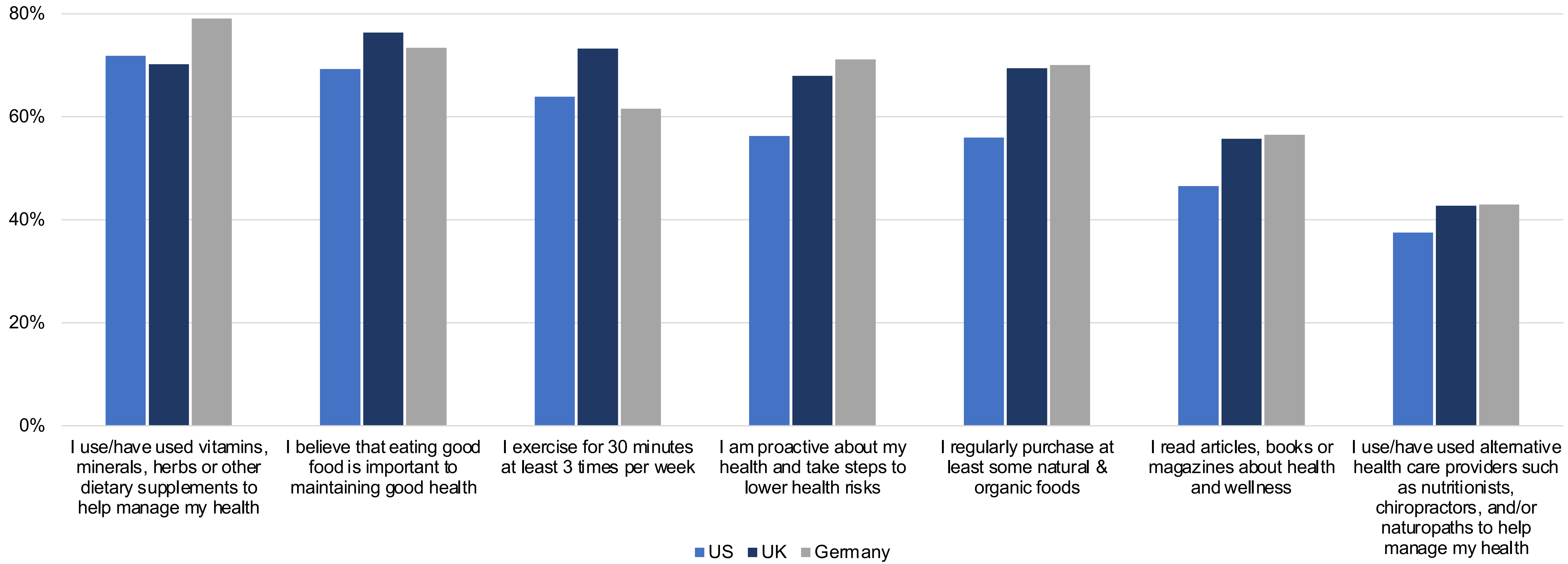


Note: All respondents n=2004, CoQ10 users n+585. Question: “Please read the following statements and select ALL that apply.”

PROFILE OF COQ10 USER

KEY ITC INSIGHT:

- UK CoQ10 regular users are less focused on supplements to manage health (67%), but are more likely to have visited an alternative healthcare provider (53%) compared to all UK respondents (28%)



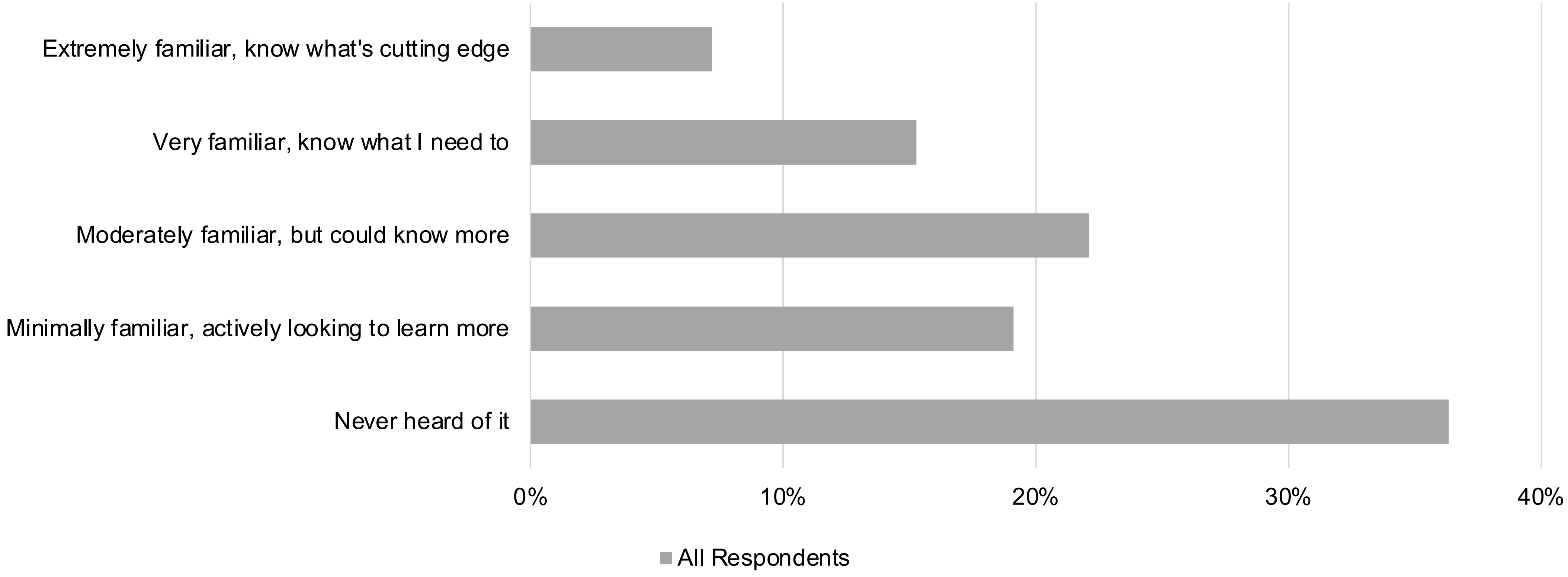
Note: US users n=277, UK users n=131, German users n=177.

COQ10 USERS: BENEFITS, FAMILIARITY, PERCEIVED EFFICACY

FAMILIARITY WITH COQ10

KEY ITC INSIGHT:

- Two-thirds of supplement users have heard of CoQ10

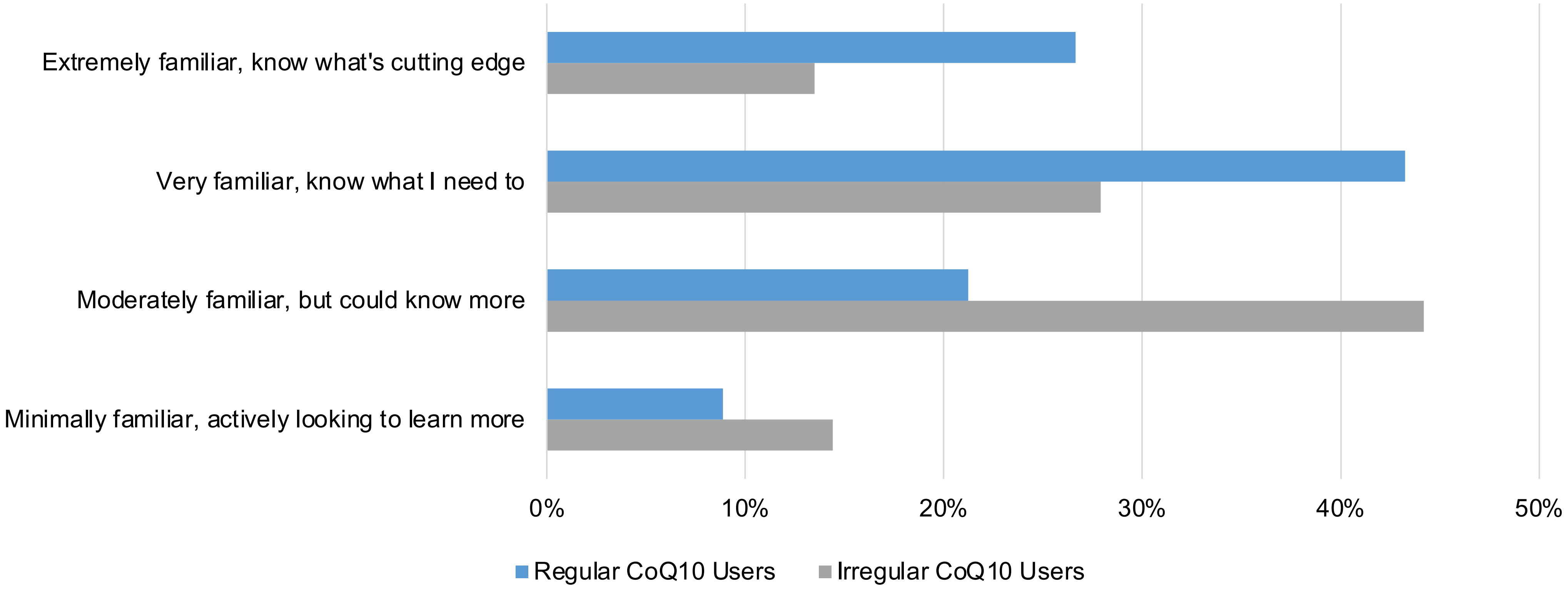


Note: All respondents n=2004. Question: “How familiar would you consider yourself regarding the use CoQ10?”

FAMILIARITY WITH COQ10

KEY ITC INSIGHT:

- While 70% of regular users are very or extremely familiar with its usage, most irregular users continue to need more education (59% minimally/moderately familiar)

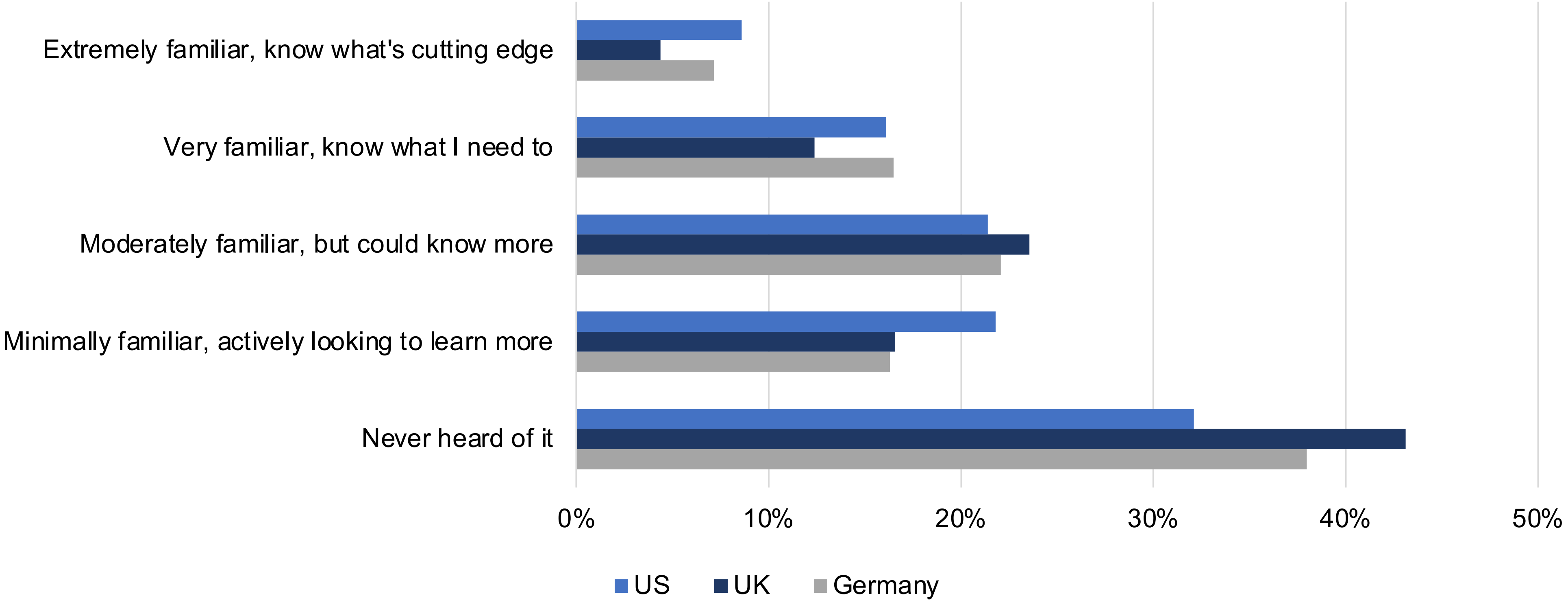


Note: Regular users indicated using supplement at least 4 times per week. N=259 for CoQ10 regular users, n=326 for CoQ10 irregular users. Question: “How familiar would you consider yourself regarding the use of this supplement?”

FAMILIARITY WITH COQ10

KEY ITC INSIGHTS:

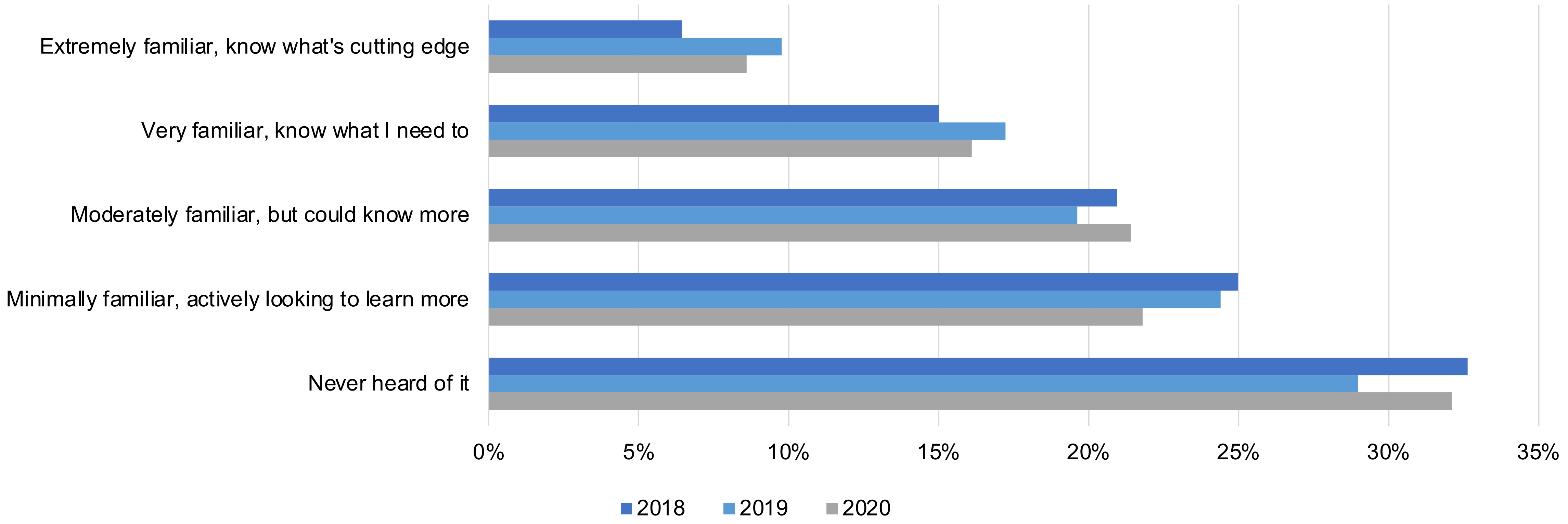
- Knowledge is highest in US (68% heard of it) vs. UK (57%) and Germany (62%)
- US consumer awareness remains fairly steady, with 73% of regular users feeling very/extremely familiar
- US regular users are most comfortable in their knowledge levels (73% very/extremely familiar), vs. Germany (64%)



Note: All respondents, US n=1000, UK n=501, German n=503. Question: "How familiar would you consider yourself regarding CoQ10?"

FAMILIARITY WITH COQ10

KEY ITC INSIGHT:
- Familiarity remains steady of the years

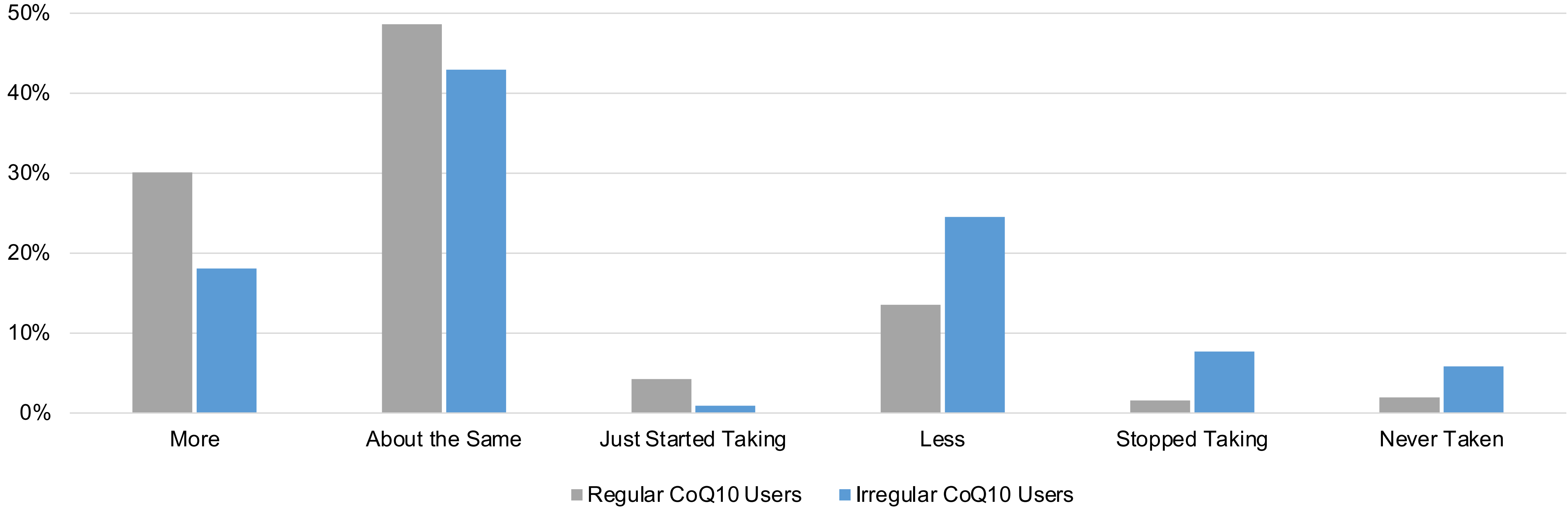


Note: All US respondents 2018 n=993, 2019 n=1004, 2020 n=1000. Question: “How familiar would you consider yourself regarding CoQ10?”

COQ10 USAGE CHANGE

KEY ITC INSIGHTS:

- 34% of regular users indicated that they had just started taking or increased their usage in the last year, with 14% indicating "significantly more" usage
- 32% of irregular users indicated that they are using CoQ10 less or had stopped taking it in the last year (including 34% for US vs. 25% last year)

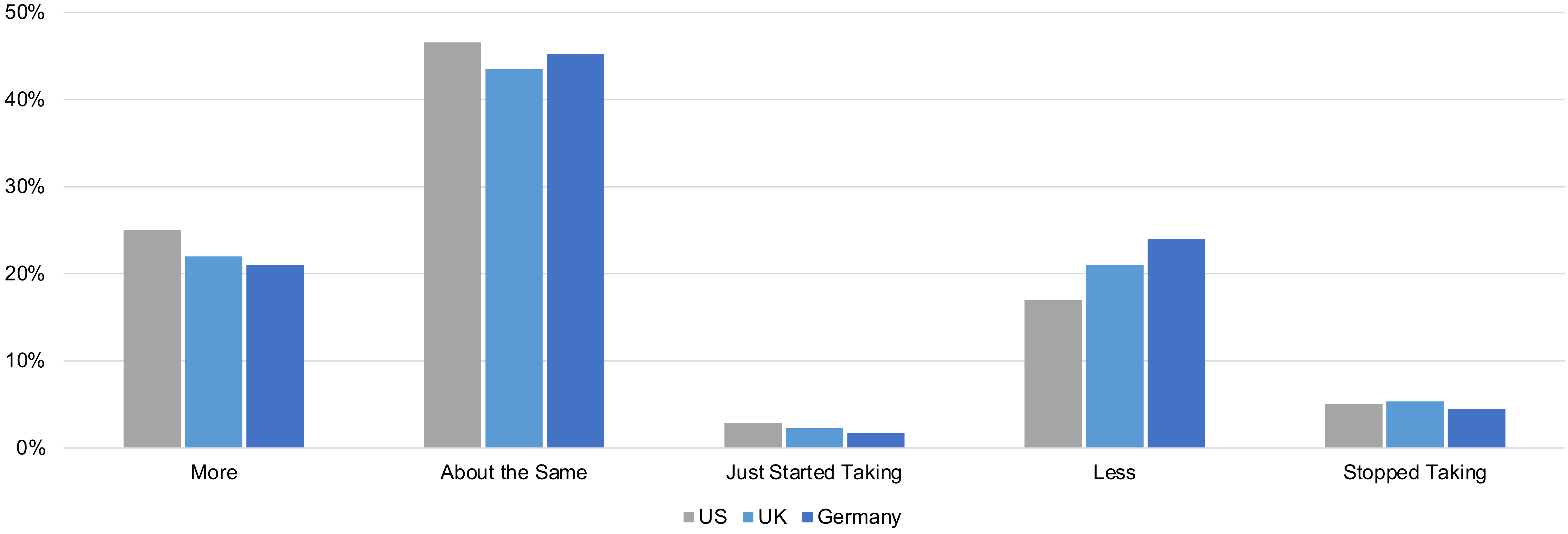


Note: Regular users indicated using supplement at least 4 times per week n=259 , n=356 for irregular users. Question: "Which of the following best describes how your use of CoQ10 compares to your usage 1 year ago?"

COQ10 USAGE CHANGE

KEY ITC INSIGHT:

- Usage increases and decreases for regular users are similar across countries

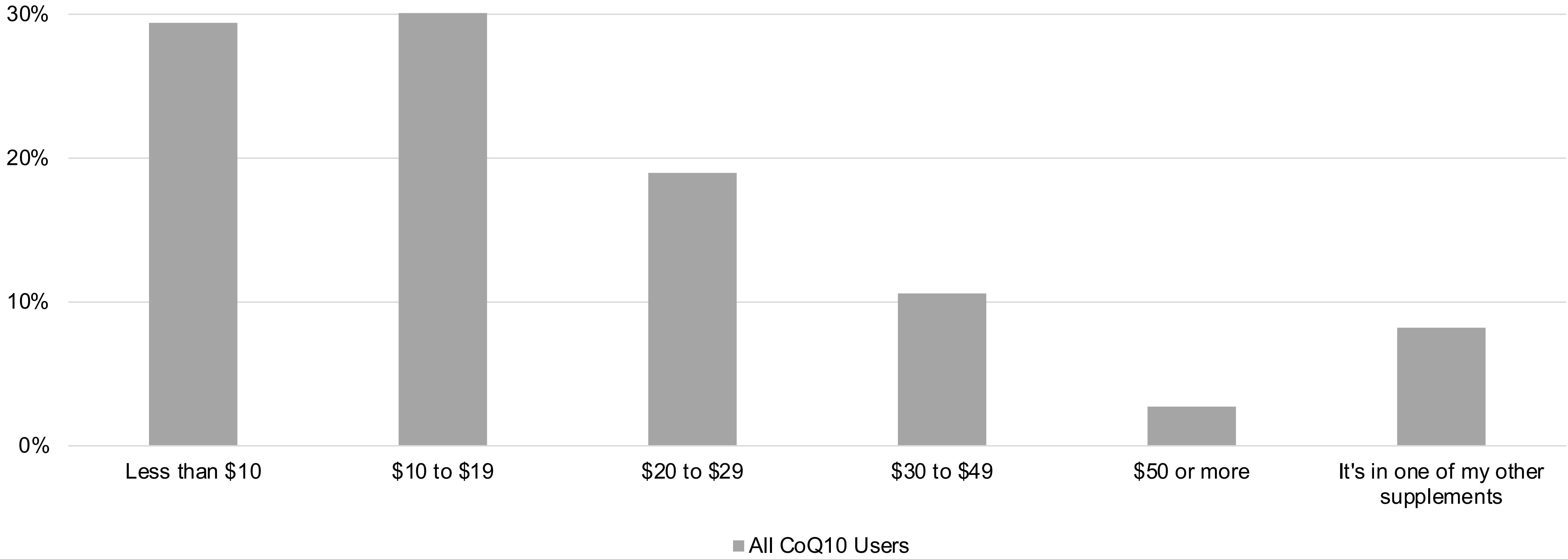


Note: Regular users indicated using supplement at least 4 times per week, US N= 277, UK N=131, Germany N= 177.Question: "Which of the following best describes how your use of each of this supplement compares to your usage 1 year ago?"

MONTHLY SPEND ON COQ10

KEY ITC INSIGHT:

- CoQ10 users at all levels are spending $16.55/month, more than consumers spend on most other supplements considered in this study (ranked 4th of 14)

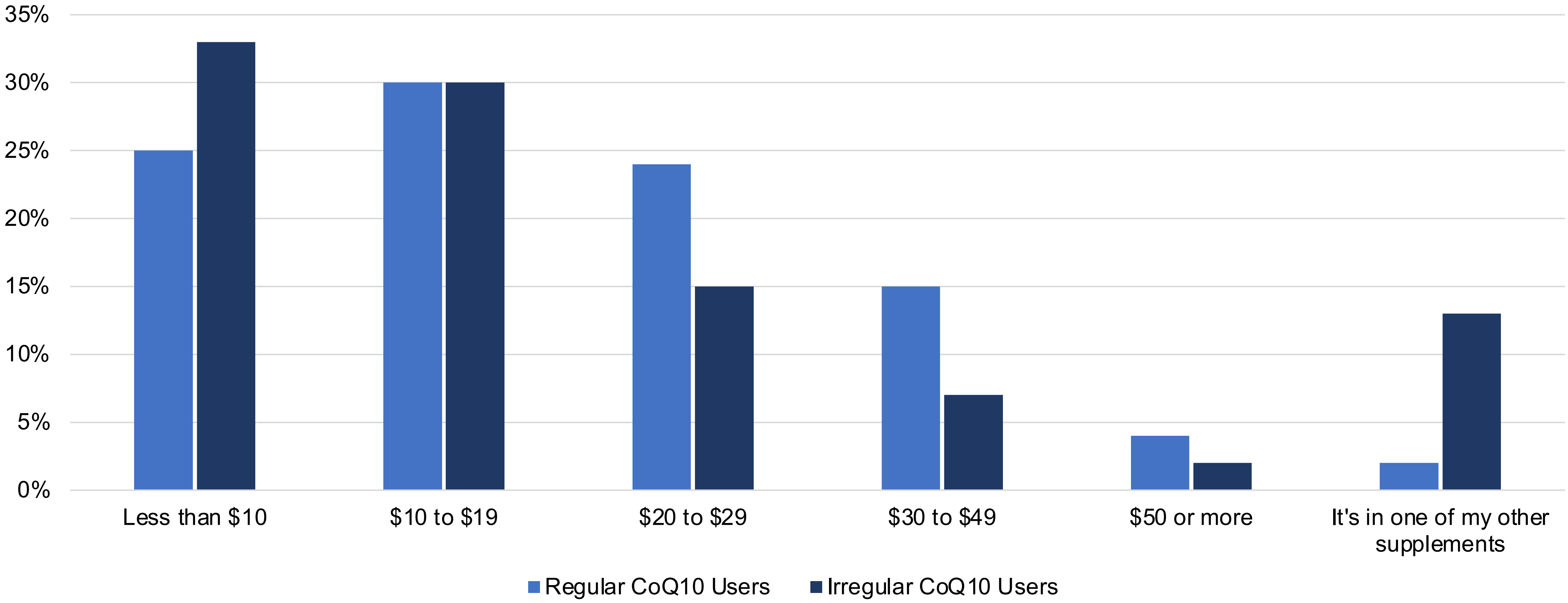


Note. CoQ10 users n=585. Question: “Approximately how much per month do you spend on CoQ10?”

MONTHLY SPEND ON COQ10

KEY ITC INSIGHT:

- Regular users' average monthly spend is about 46% more than what irregular users spend ($20.08 regular vs. $13.75 irregular)

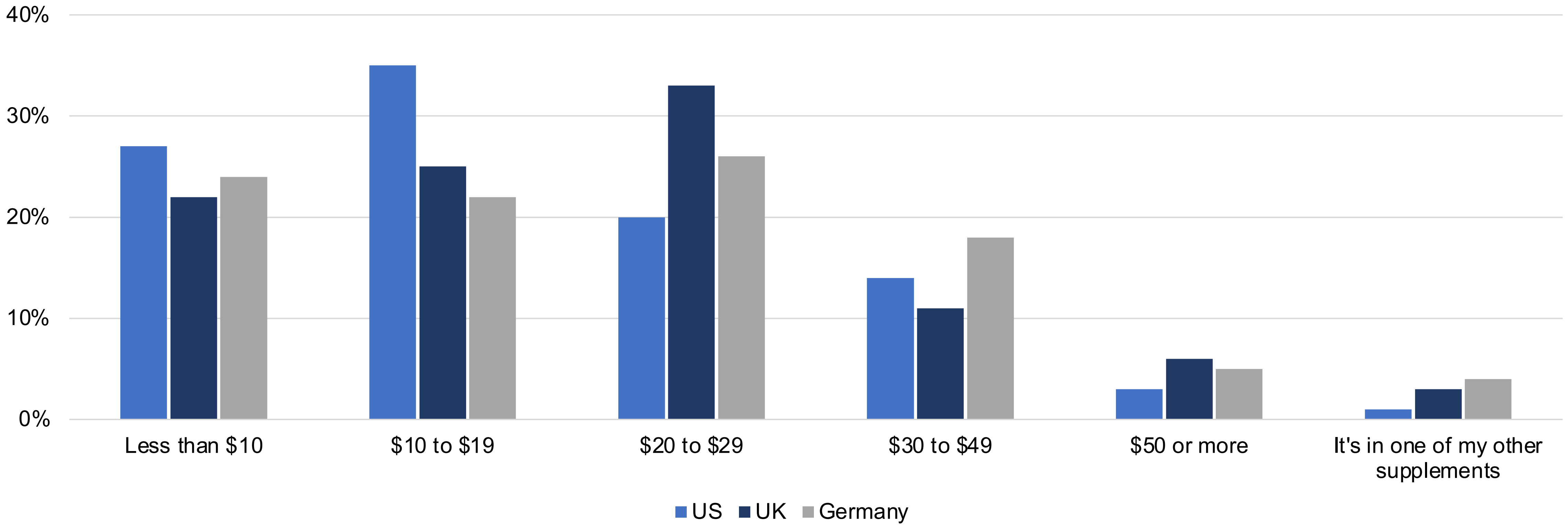


Note: Regular users indicated using supplement at least 4 times per week. n=259, n=356 for irregular users. Question: "Approximately how much per month do you spend on CoQ10?"

MONTHLY SPEND ON COQ10

KEY ITC INSIGHTS:

- Regular users in UK spent a 78% premium compared to irregular users, vs an 67% premium in Germany and 20% premium in US
- Average prices for regular users: US $19.22, UK $20.72, Germany $21.42

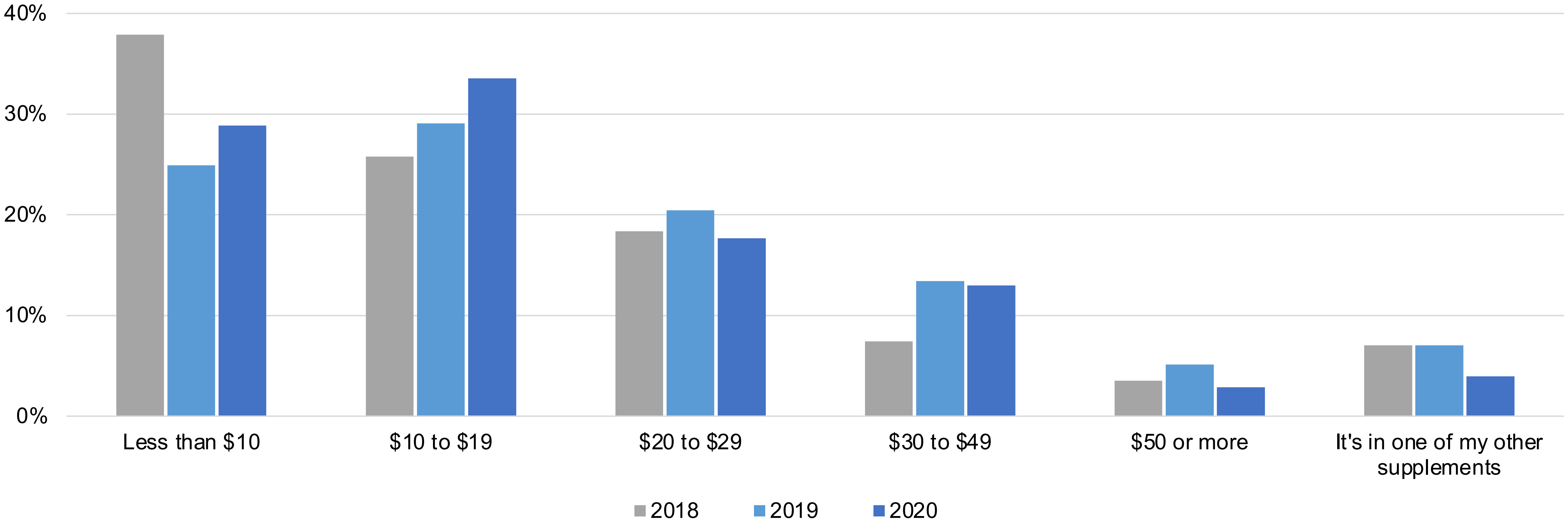


Note: Regular users indicated using supplement at least 4 times per week. US N=147, UK N= 36, Germany N=76. Question: “Approximately how much per month do you spend on CoQ10?”

MONTHLY SPEND ON COQ10

KEY ITC INSIGHT:

- US regular users' average monthly spend of $19.22 and irregular users average of $16.04 are similar to values reported last year ($21 and $17)

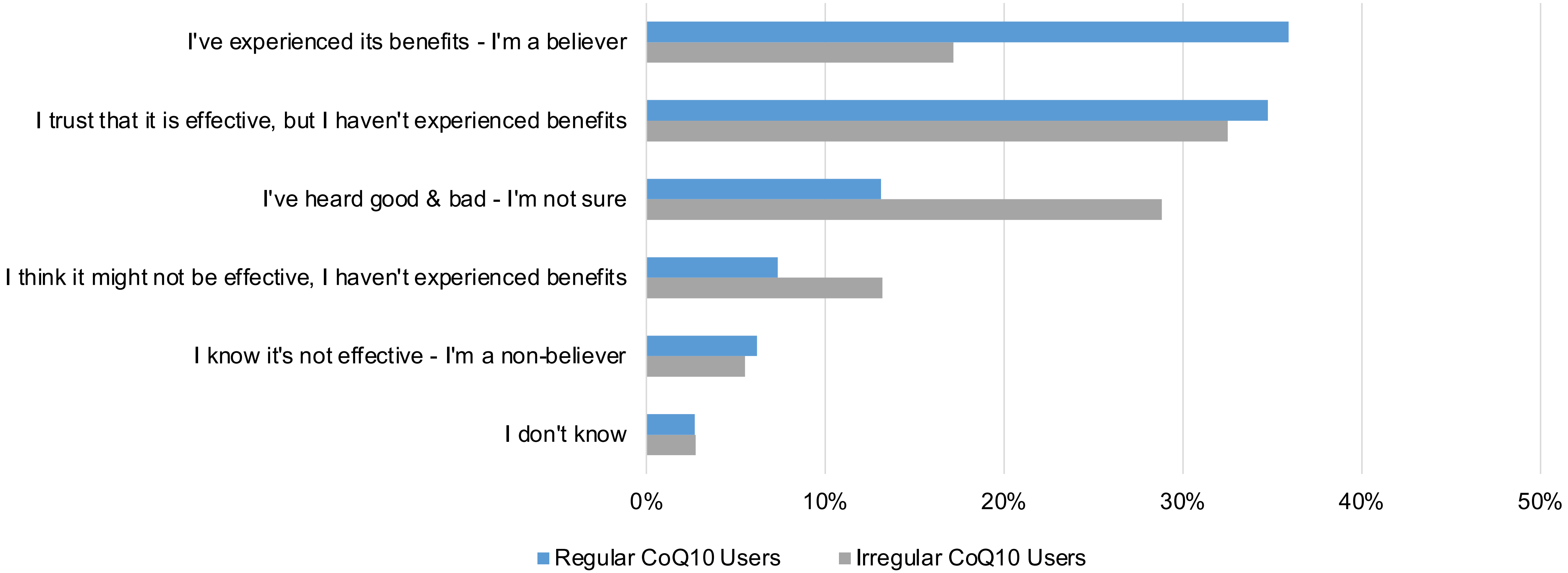


Note: US users 2018 n=256, 2019 n=313, 2020 n= 277. Question: "Approximately how much per month do you spend on CoQ10?"

PERCEIVED EFFECTIVENESS OF COQ10

KEY ITC INSIGHT:

- 36% of regular users have experienced the benefits of coq10, which is below average compared to other regular users' beliefs in other supplements considered in this study

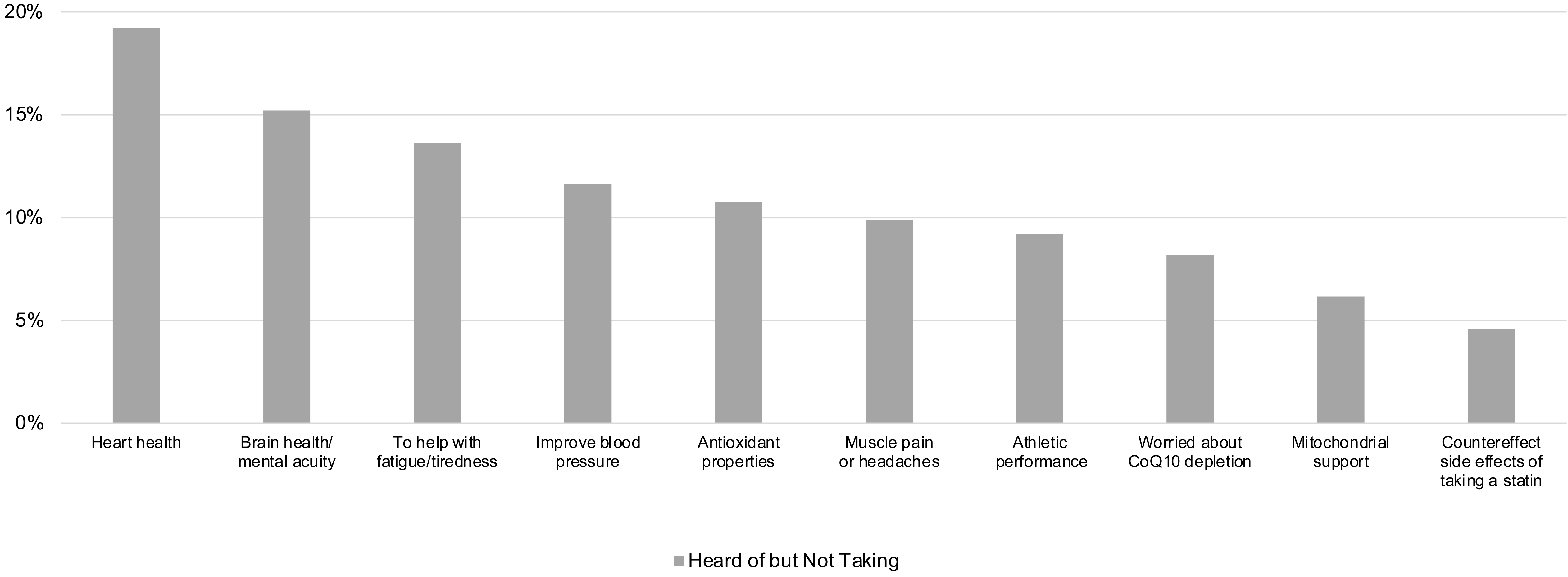


Note: Regular users indicated using supplement at least 4 times per week. N=259 for coq10 regular users, N=356 for coq10 irregular users.
Question: "What is your opinion of the effectiveness/benefit of this supplement?"

BENEFITS OF COQ10

KEY ITC INSIGHT:

- Half of supplement users that have heard of CoQ10 continue to be unfamiliar with the benefits

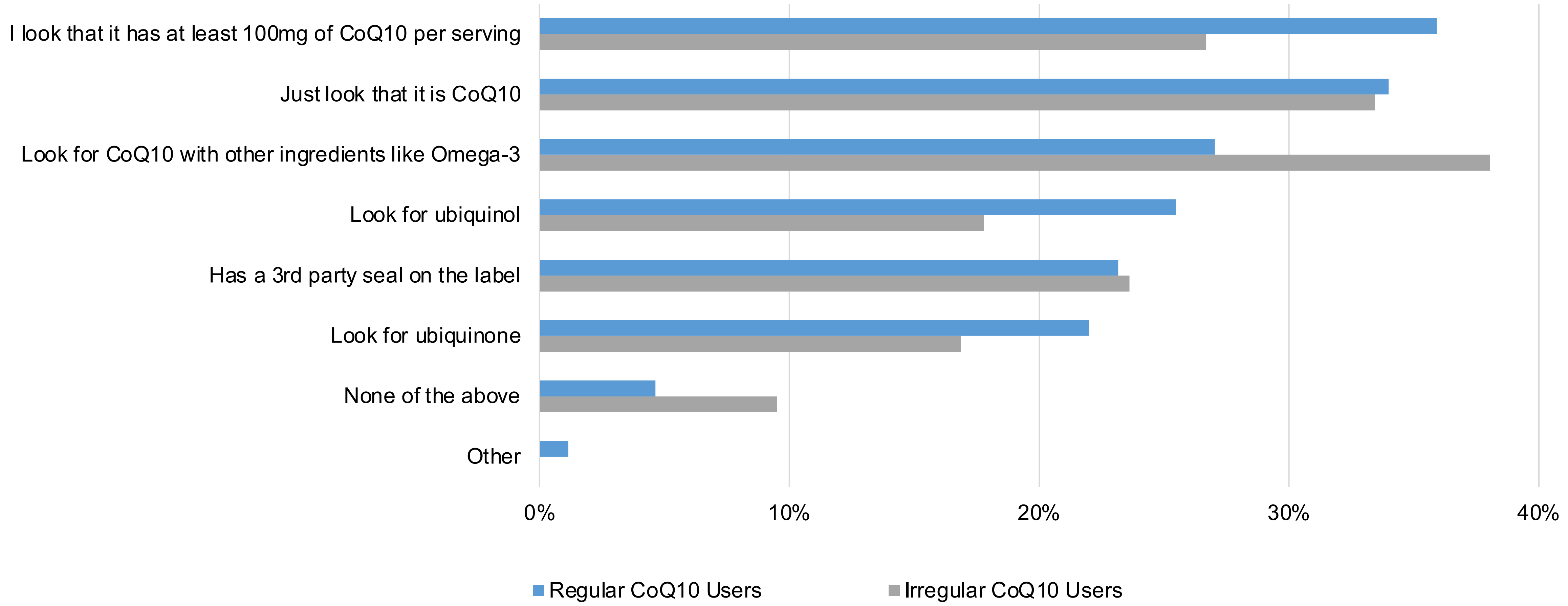


Note: N=697 for heard of but not taking. Question: “What have you heard are the benefits of taking a coq10 supplement?”

COQ10 PURCHASING DECISION

KEY ITC INSIGHT:

- Irregular users are more likely to look for CoQ10 paired with other ingredients (38%)

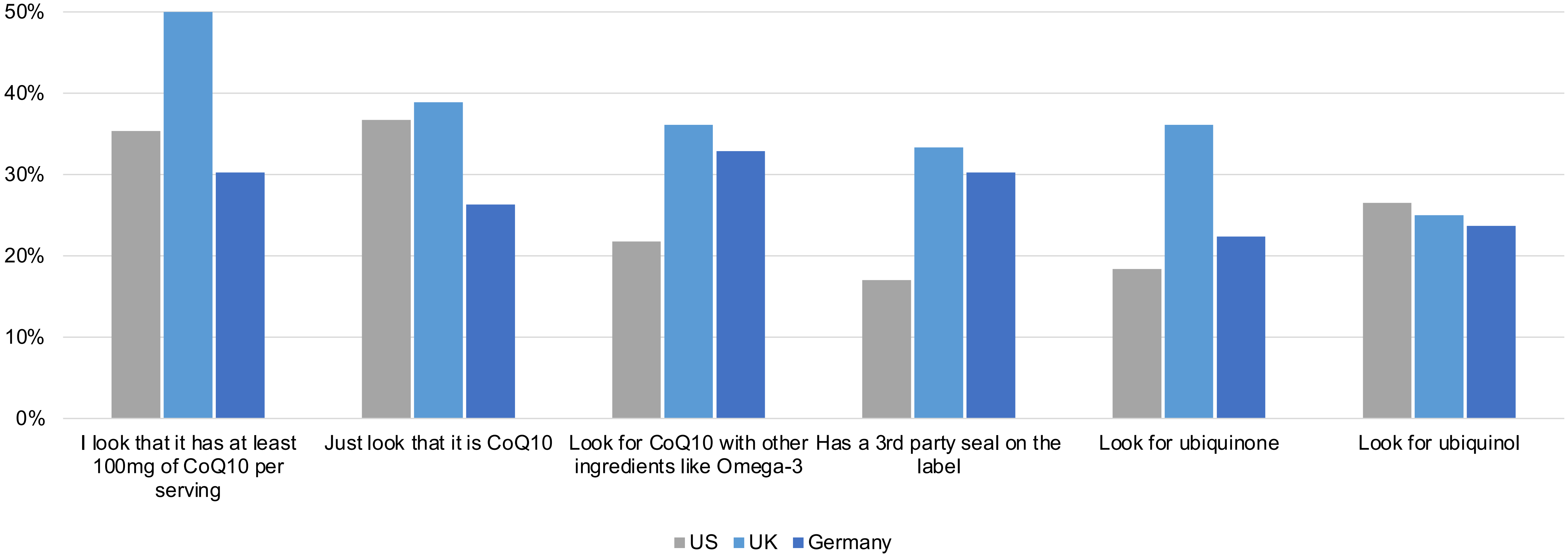


Note: Regular users indicated using supplement at least 4 times per week. n=259 for regular users, n=326 for irregular users. Question: "When you select what coq10 to purchase, do you look for any of these specific characteristics?

COQ10 PURCHASING DECISION

KEY ITC INSIGHTS:

- Germany and UK regular users are more likely to value a 3rd party label (30% & 33%) vs. US (17%)
- UK surveys very high on looking for at least 100 mg

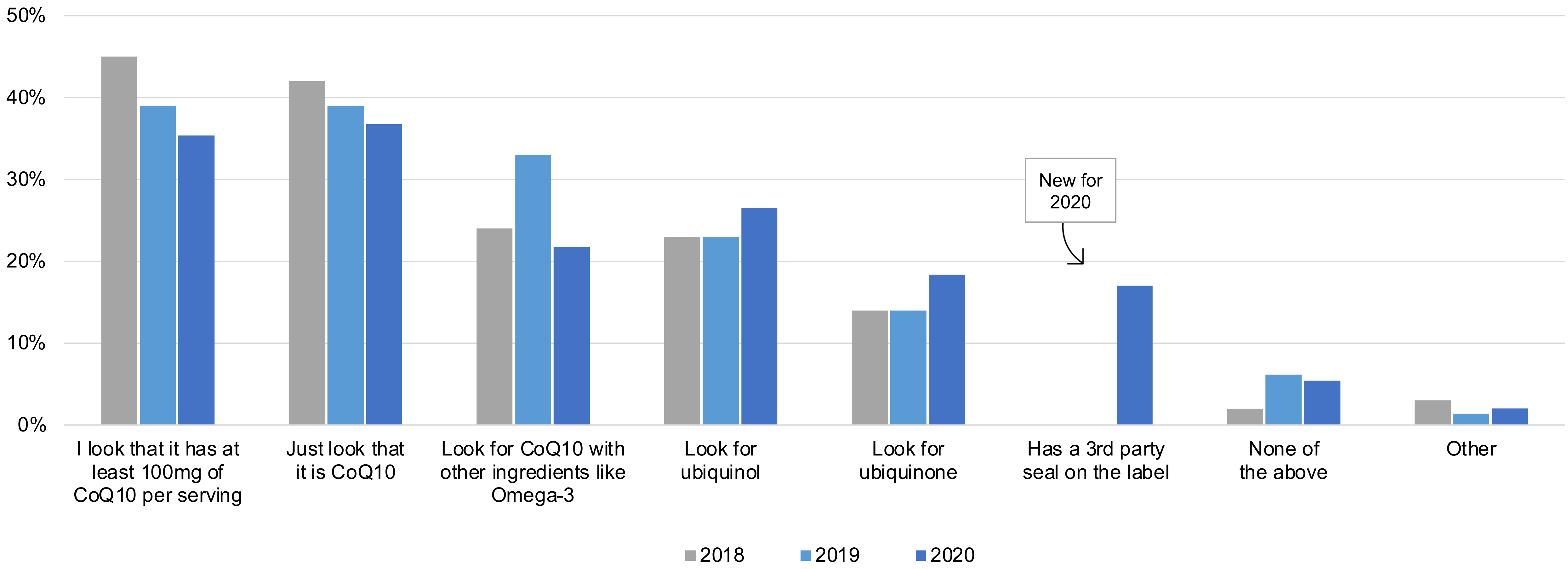


Note: Regular users indicated using supplement at least 4 times per week. US N=147, UK N=36, Germany N=76. Question: "When you select what coq10 to purchase, do you look for any of these specific characteristics?

COQ10 PURCHASING DECISION

KEY ITC INSIGHT:

- Looking for ubiquinone/ ubiquinol has risen in popularity over the years



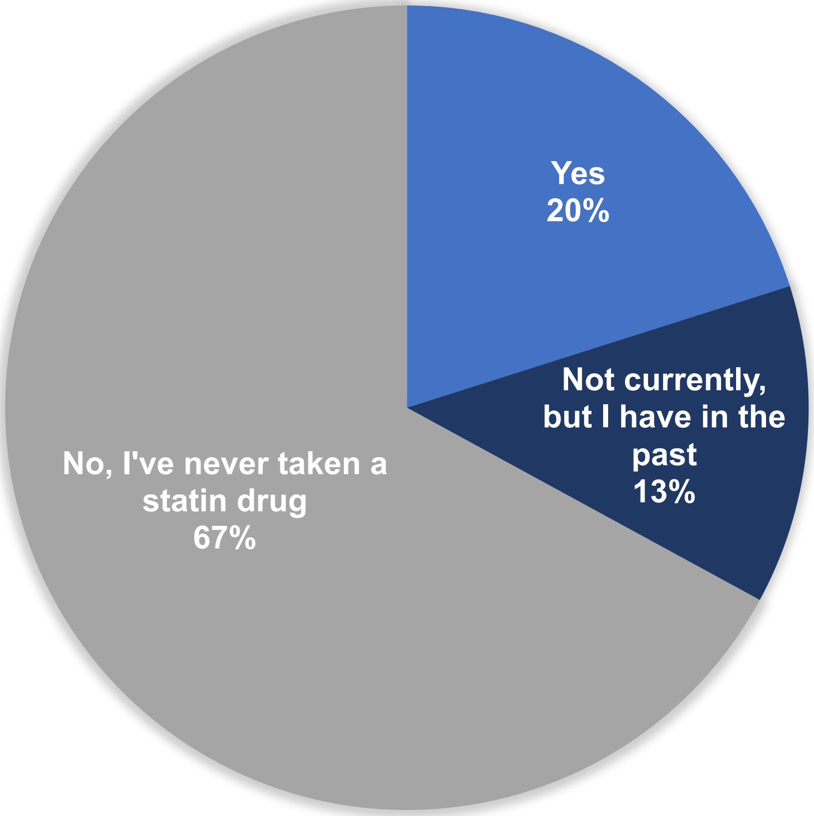
Note: Regular users indicated using supplement at least 4 times per week. n=259, n=326 for irregular users. Question: “When you select what coq10 to purchase, do you look for any of these specific characteristics?

STATINS & COQ10

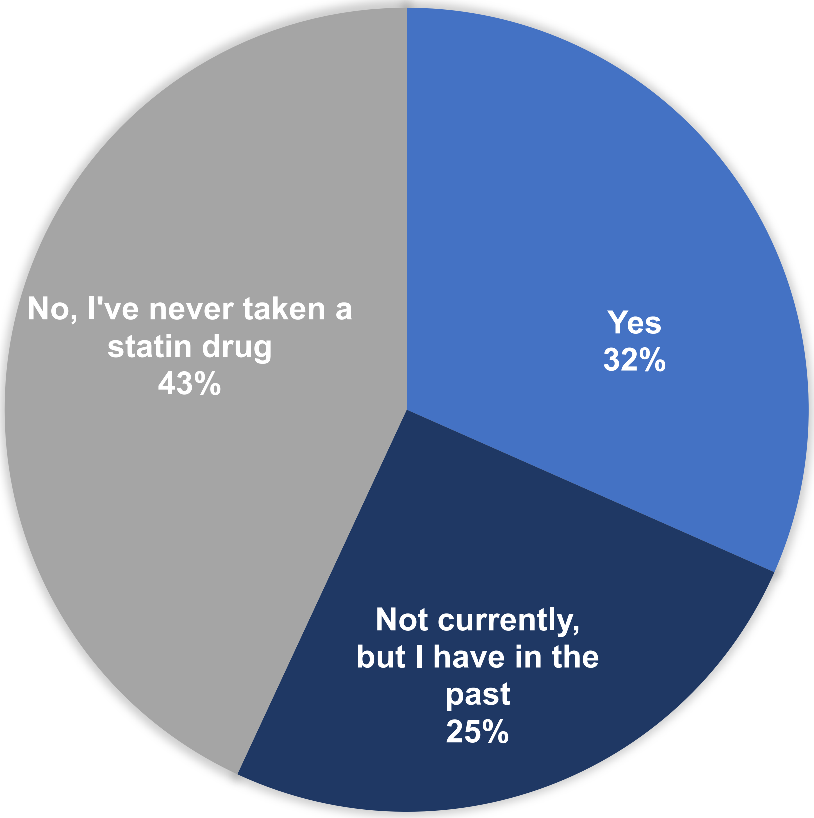
KEY ITC INSIGHTS:

- 20% of all study participants indicated that they are taking a statin drug, including 25% in US, 17% in UK, and 14% in Germany
- 32% of all coq10 users (at any level) take a statin while 25% took a statin in the past

All Respondents



All CoQ10 Users

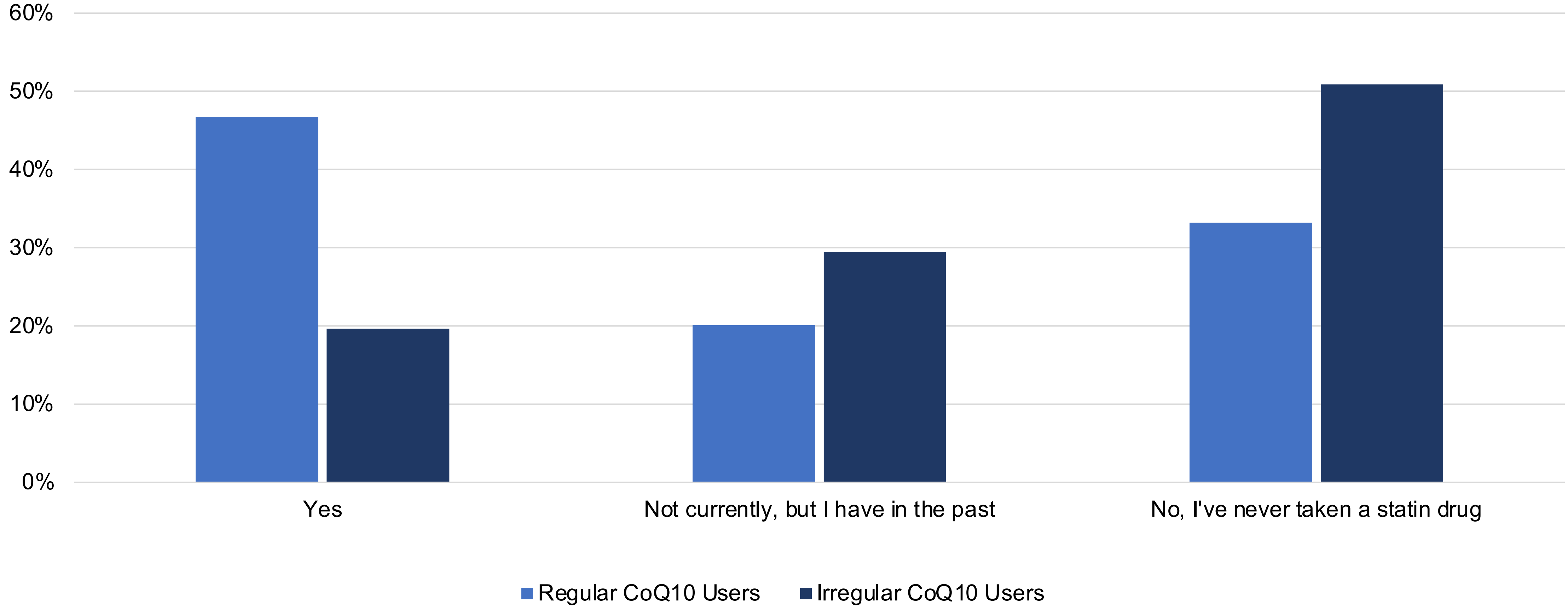


Note: All respondents N=2004, all CoQ10 users N=585. Question: “Are you currently taking a statin drug?”

STATINS & COQ10

KEY ITC INSIGHT:

- 47% of regular coq10 users take a statin and 20% of regular coq10 users are past statin takers

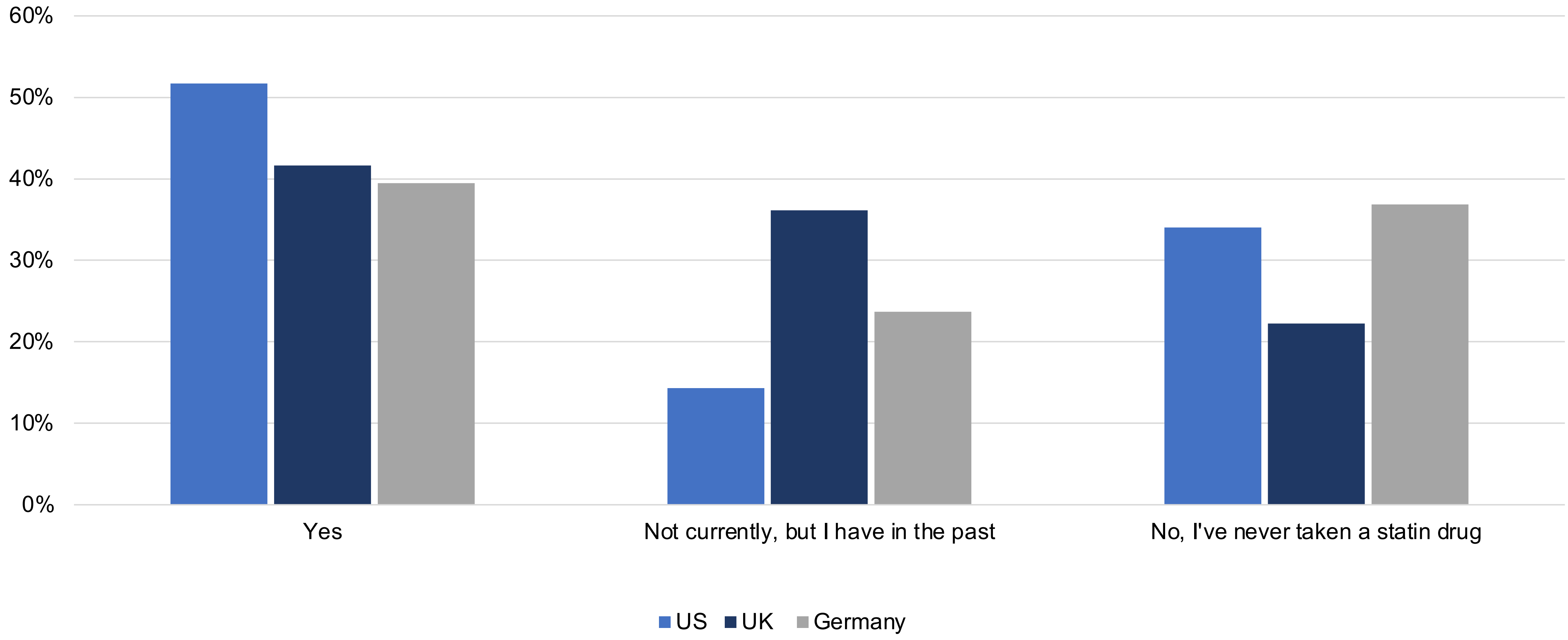


Note: Regular users indicated using supplement at least 4 times per week n=259, n=326 for irregular users. Question: "Are you currently taking a statin drug?"

STATINS & COQ10

KEY ITC INSIGHTS:

- Breakdown of regular CoQ10 users that currently take a statin; 52% in US, 42% in UK, and 39% in Germany
- Breakdown of regular CoQ10 users are past statin takers:14% in US, 36% in UK, and 24% in Germany

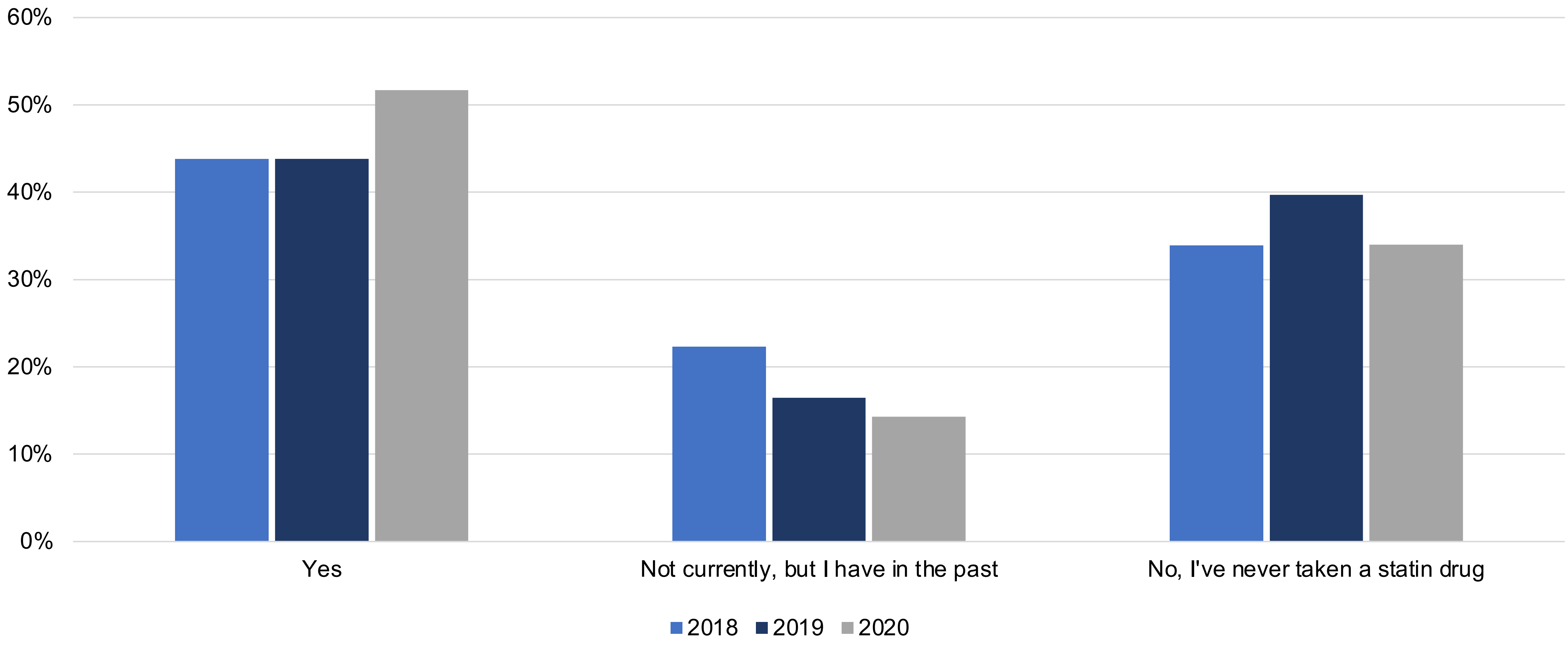


Note: Regular users indicated using supplement at least 4 times per week. US N=147, UK N=36, Germany N=76. Question: “Are you currently taking a statin drug?”

STATINS & COQ10

KEY ITC INSIGHT:

- Statin drug use has gone up with regular CoQ10 users



Note: Regular CoQ10 users 2018 n=121, 2019 n=146, 2020 n=147. Question: “Are you currently taking a statin drug?”