



Consumer Perceptions on Omega-3 Supplements: A Survey of Supplement Users in the US and China

2022

2022 Supplement Consumer Survey

- Fielded by Dynata March 1-26, 2022
 - Written & analyzed by the Industry Transparency Center (ITC)
- Survey of more than 2000 consumers
 - 1,000 US, 1,038 China
 - Disqualified poor quality responses and respondents who did not fit survey consumer profile parameters
- General Criteria for Participation
 - Supplement users
 - Corrected for people who proclaimed they are 'not a user' in questioning

*The information in this presentation is for the recipient only and should not be shared in its entirety.
You may share components of this survey data with attribution:*

Consumer Perceptions on Omega-3 Supplements: A Survey of Supplement Users in the US and China

Table of Contents

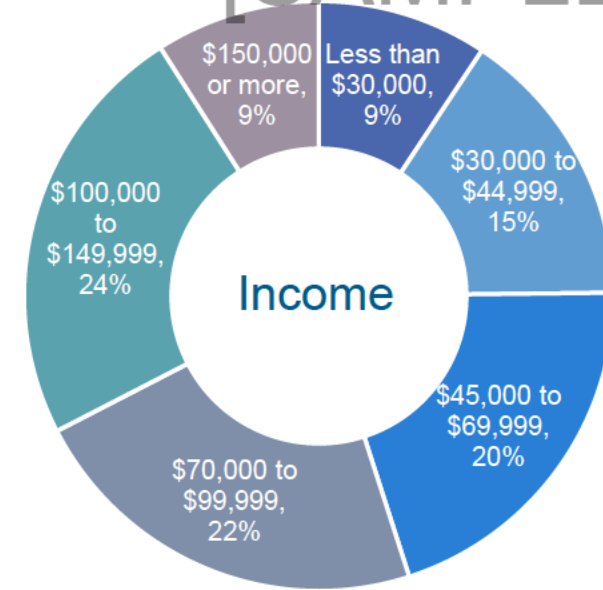
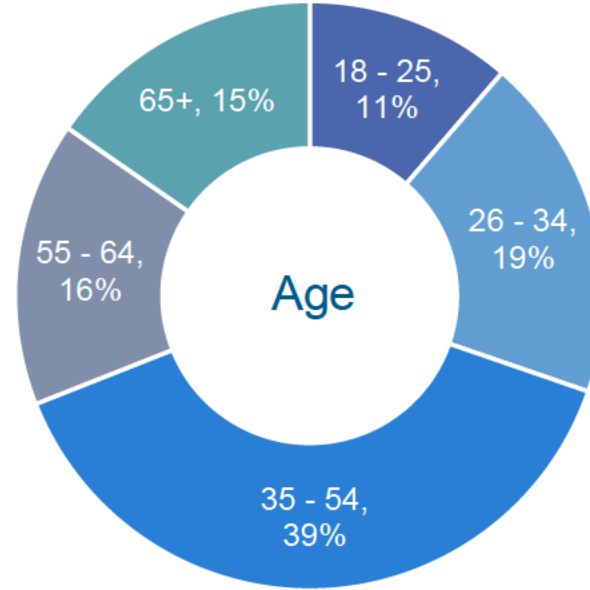
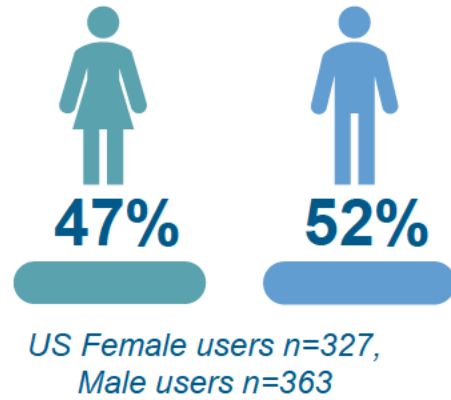
- Slide 5: Omega-3 Users: Demographics
- Slide 6: Health Attitudes
- Slide 7: Health Attitudes: Regular/Irregular Users
- Slide 8: Health Attitudes: Gender
- Slide 9: Health Attitudes: Age
- Slide 10: Omega-3 Users Health Concerns: US
- Slide 11: Omega-3 Users Health Concerns: China
- Slide 12: Omega-3 Users Top 5 Health Concerns: US
- Slide 13: Omega-3 Users Top 5 Health Concerns: China
- Slide 14: Omega-3 Users Health Concerns: US, Age
- Slide 15: Omega-3 Users Health Concerns: China, Age
- Slide 23: Omega-3 Usage: US
- Slide 24: Omega-3 Usage: China
- Slide 25: Omega-3 Usage: Age
- Slide 26: Omega-3 Usage: Gender
- Slide 27: Benchmark Supplement Usage Level: 2018-2022 US
- Slide 28: Omega-3 Usage Change
- Slide 29: Usage Change: Age
- Slide 30: Usage Change: Gender
- Slide 31: Why They Take Omega-3s
- Slide 32: Why They Take Omega-3s: Regular/Irregular
- Slide 33: Why They Take Omega-3s: Gender
- Slide 34: Why They Take Omega-3s: Age
- Slide 35: Usage Time of Day: Regular/Irregular Users
- Slide 36: What Characteristic Omega-3 Users Look For
- Slide 37: What Characteristic Omega-3 Users Look For: Regular/Irregular Users
- Slide 38: What Characteristics Omega-3 Users Look For: Gender
- Slide 39: What Characteristics Omega-3 Users Look For: Age
- Slide 41: Average Monthly Spend: US
- Slide 42: Average Monthly Spend: China
- Slide 43: Average Monthly Spend: US Age/Gender
- Slide 44: Average Monthly Spend: China Age/Gender
- Slide 45: Where Omega-3 Users Purchase Supplements
- Slide 47: Familiarity
- Slide 48: Familiarity: Age
- Slide 49: Familiarity: Gender
- Slide 50: Familiarity Comparison
- Slide 51: Awareness of Omega-3 Benefits
- Slide 52: Awareness of Omega-3 Benefits: Gender
- Slide 53: Awareness of Omega-3 Benefits: Age
- Slide 55: Source of Learning About Omega-3 Benefits: China
- Slide 56: Source of Learning About Omega-3 Benefits: US, Gender
- Slide 57: Source of Learning About Omega-3 Benefits: China, Gender
- Slide 58: How Users Learn About Omega-3s: US, Age
- Slide 59: Source of Learning About Omega-3 Benefits: China, Age
- Slide 60: Perceived Effectiveness of Omega-3s
- Slide 61: Perceived Effectiveness of Omega-3s: Gender
- Slide 62: Perceived Effectiveness of Omega-3s: US, Age
- Slide 63: Perceived Effectiveness: Top 2 (All Supplements), US 2018-2022
- Slide 64: Supplement Selection Criteria
- Slide 65: Supplement Selection Criteria: Regular/Irregular Users
- Slide 66: Supplement Selection Criteria: Gender
- Slide 67: Supplement Selection Criteria: Age
- Slide 68: Characteristics Encouraging Purchase
- Slide 69: Characteristics Encouraging Purchase: Gender
- Slide 70: Characteristics Encouraging Purchase: Age
- Slide 72: Importance of Branded Ingredients
- Slide 73: Importance of Branded Ingredients: Age
- Slide 74: Branded Ingredient Price Premium
- Slide 75: Branded Ingredient Importance and Willingness to Pay a Premium
- Slide 77: Signals of Brand Transparency
- Slide 78: Signals of Brand Transparency: Regular/Irregular Users
- Slide 79: Signals of Brand Transparency: Gender
- Slide 80: Signals of Brand Transparency: Age
- Slide 81: Transparency Purchase Influence
- Slide 82: Transparency Purchase Influence
- Slide 83: Transparency Purchase Influence: Regular/Irregular Users
- Slide 84: Transparency Purchase Influence: Gender
- Slide 85: Transparency Purchase Influence: Age
- Slide 86: Reasons for Trust: US
- Slide 87: Reasons for Trust: China
- Slide 88: Reasons for Trust: US, Regular/Irregular Users
- Slide 89: Reasons for Trust: China, Regular/Irregular Users
- Slide 90: Reasons for Trust: US, Gender
- Slide 91: Reasons for Trust: China, Gender
- Slide 92: Reasons for Trust: US, Age
- Slide 93: Reasons for Trust: China, Age
- Slide 94: Importance of Sustainability
- Slide 95: Importance of Sustainability: Regular/Irregular Users
- Slide 96: Importance of Sustainability: Gender
- Slide 97: Importance of Sustainability: Age



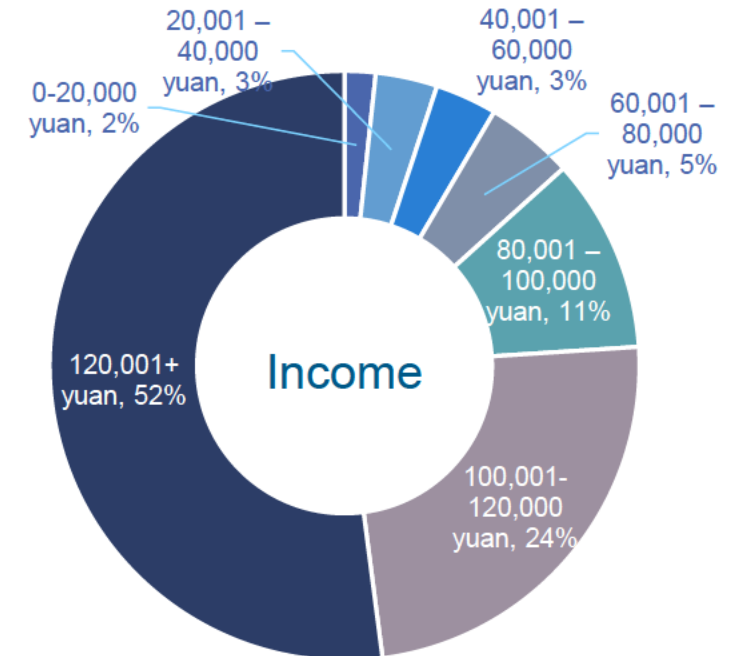
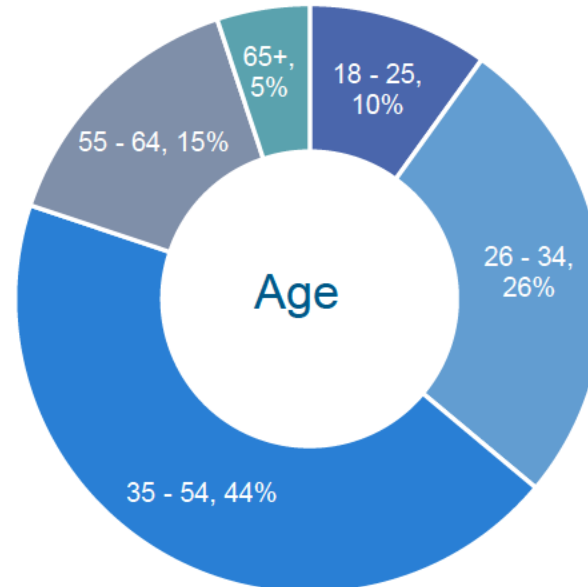
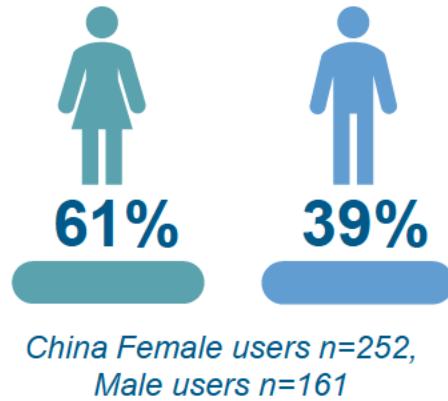
Omega-3 Supplement Users: Demographics

Omega-3 Users: Demographics

U.S.



CHINA



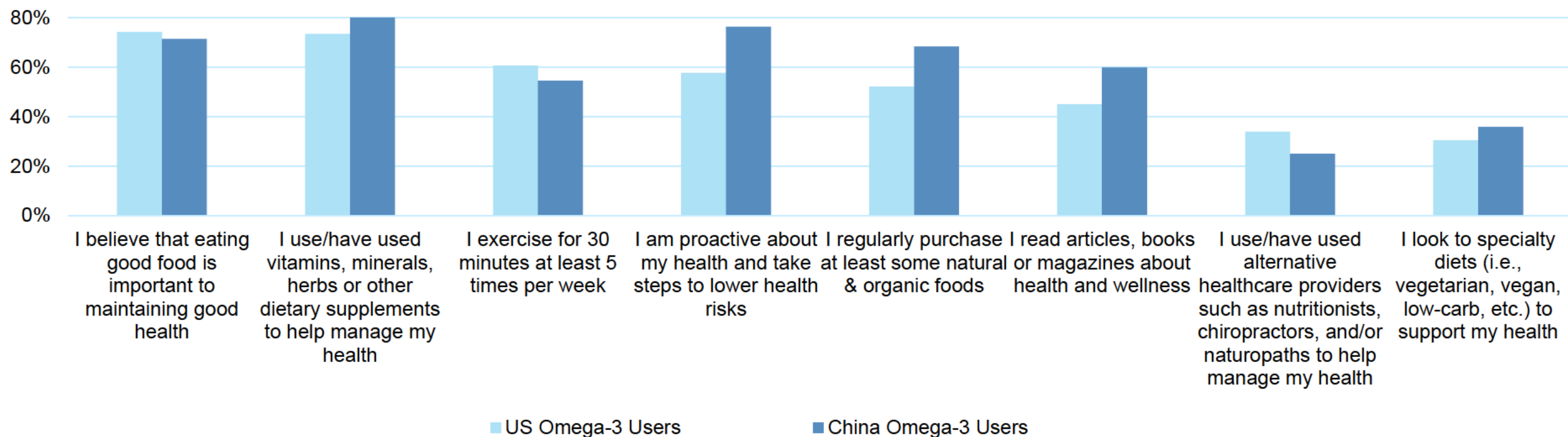
Note: All omega-3 users n=2476.

Health Attitudes



KEY ITC INSIGHT:

- Omega-3 users had very similar health attitudes to general supplement users
- Health attitudes for omega-3 users never varied more than 2% compared to the average supplement user

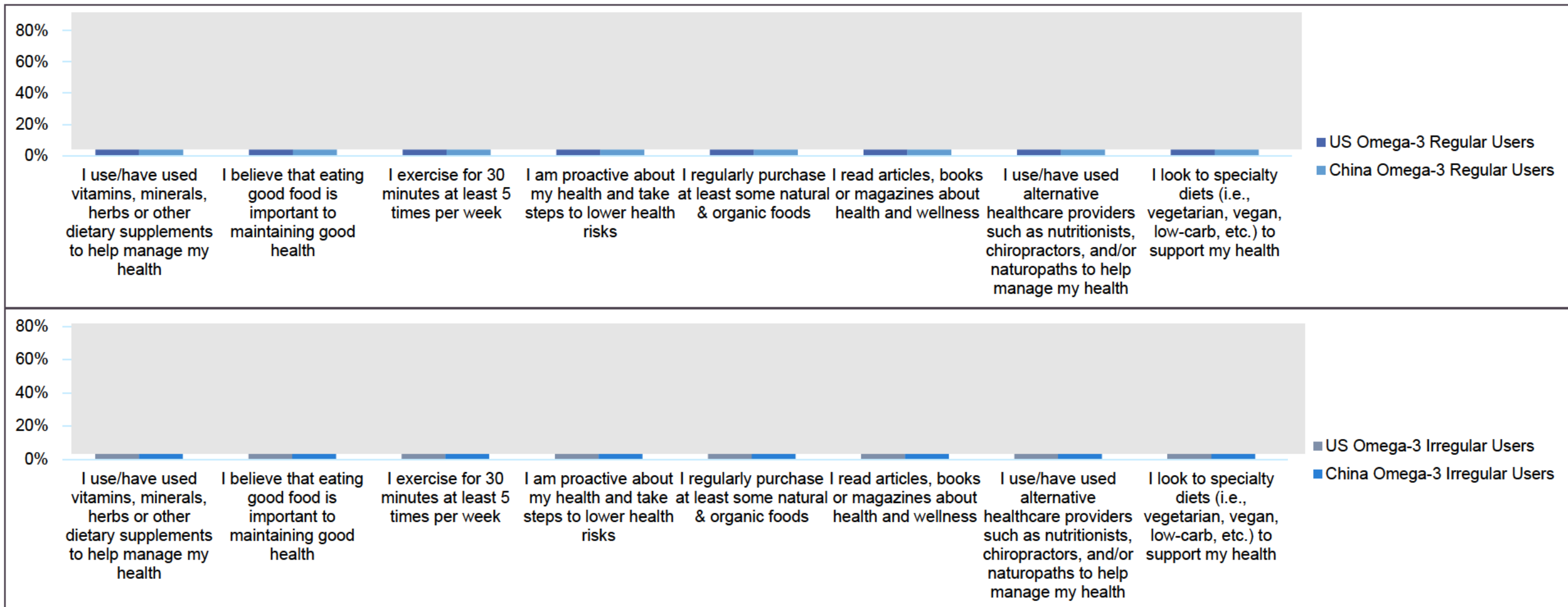


Health Attitudes: Regular/Irregular Users



KEY ITC INSIGHT:

- There were significant differences between regular and irregular users of omega-3s
- Regular omega-3 users were significantly more likely [redacted] and less likely to [redacted]



Note: Omega-3 regular users indicated using supplement at least 4 times per week US n=387, CN n=99, irregular users US n=253, CN n=292.

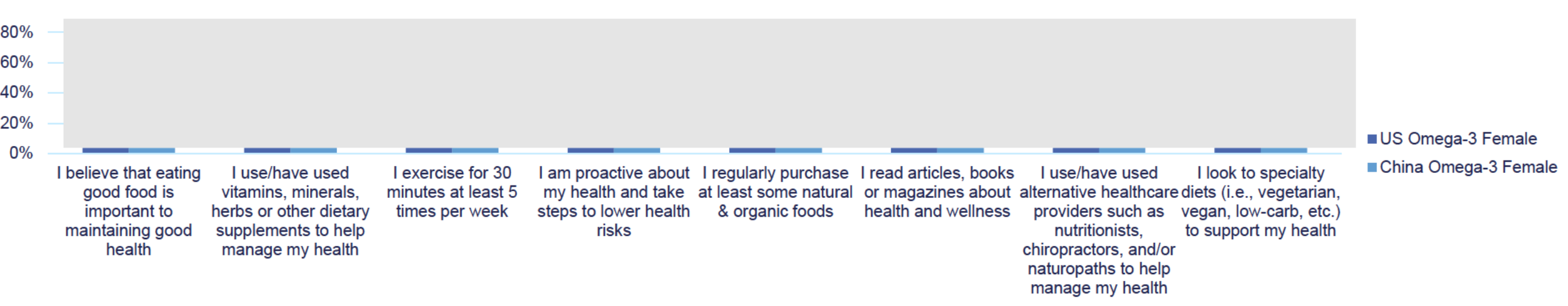
Question: "Please read the following statements and select ALL that apply."

Health Attitudes: Gender




KEY ITC INSIGHT:

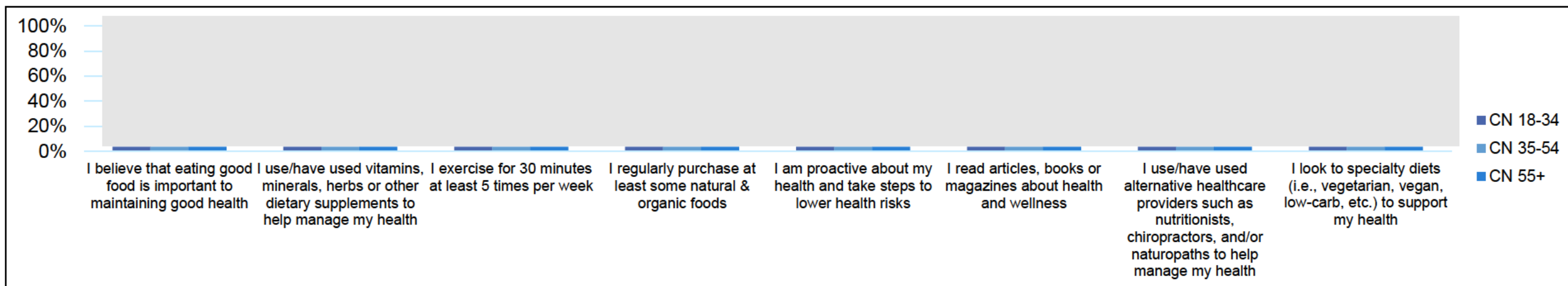
- Females [redacted]
- Among omega-3 users they were [redacted]



Note: Omega 3 users US Male n=363, CN Male n=161, US Female n=327, CN Female n=252. Question: "Please read the following statements and select ALL that apply."

Health Attitudes: Age

-  **KEY ITC INSIGHT:**
- Older omega-3 users, 55+, were much more likely to [REDACTED]
 - [REDACTED] are important to manage health
 - Those 35-54 were the most likely to [REDACTED]



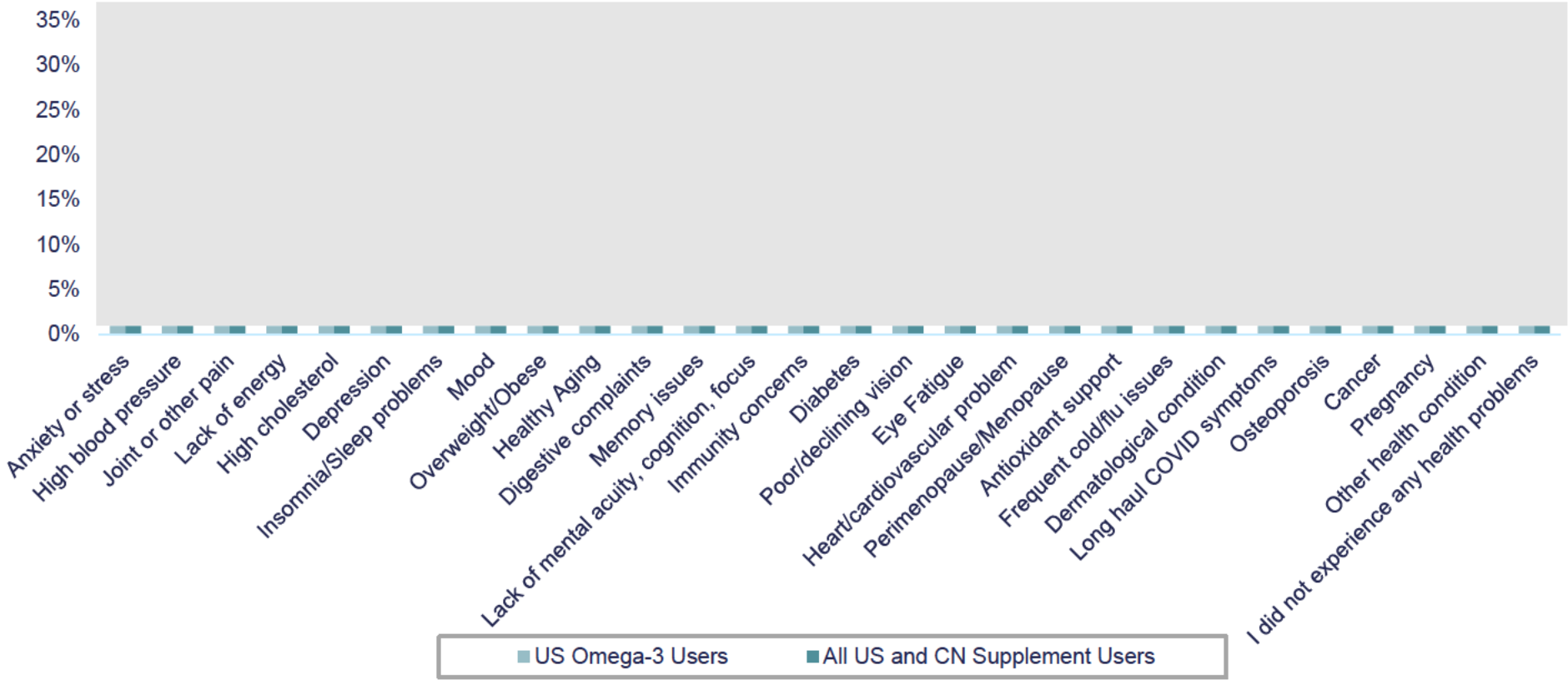
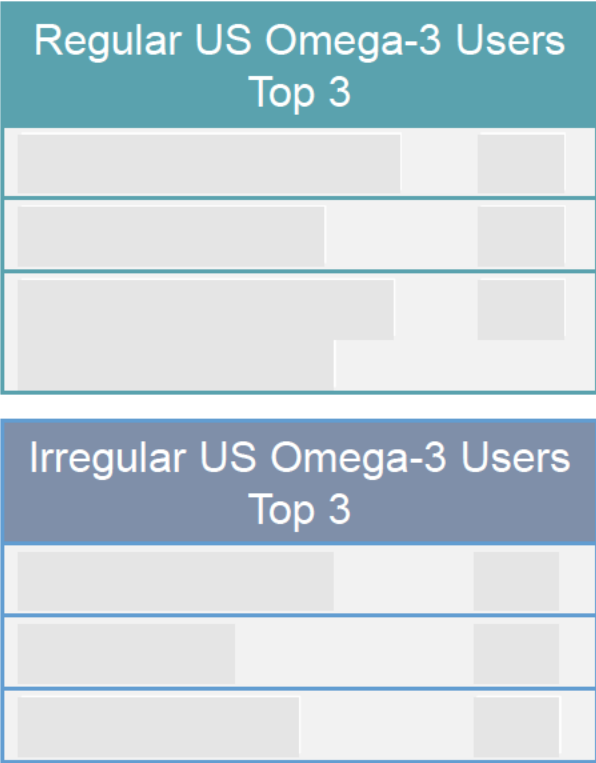
Note: Omega-3 Users US 18-34 n=211, US 35-54 n=270, US 55+ n=216; China 18-34 n=149, China 35-54 n=182, China 55+ n=82. Question: "Please read the following statements and select ALL that apply."

Omega-3 Users Health Concerns: US



KEY ITC INSIGHT:

- In the US, [redacted] was among a top concern for both regular and irregular users



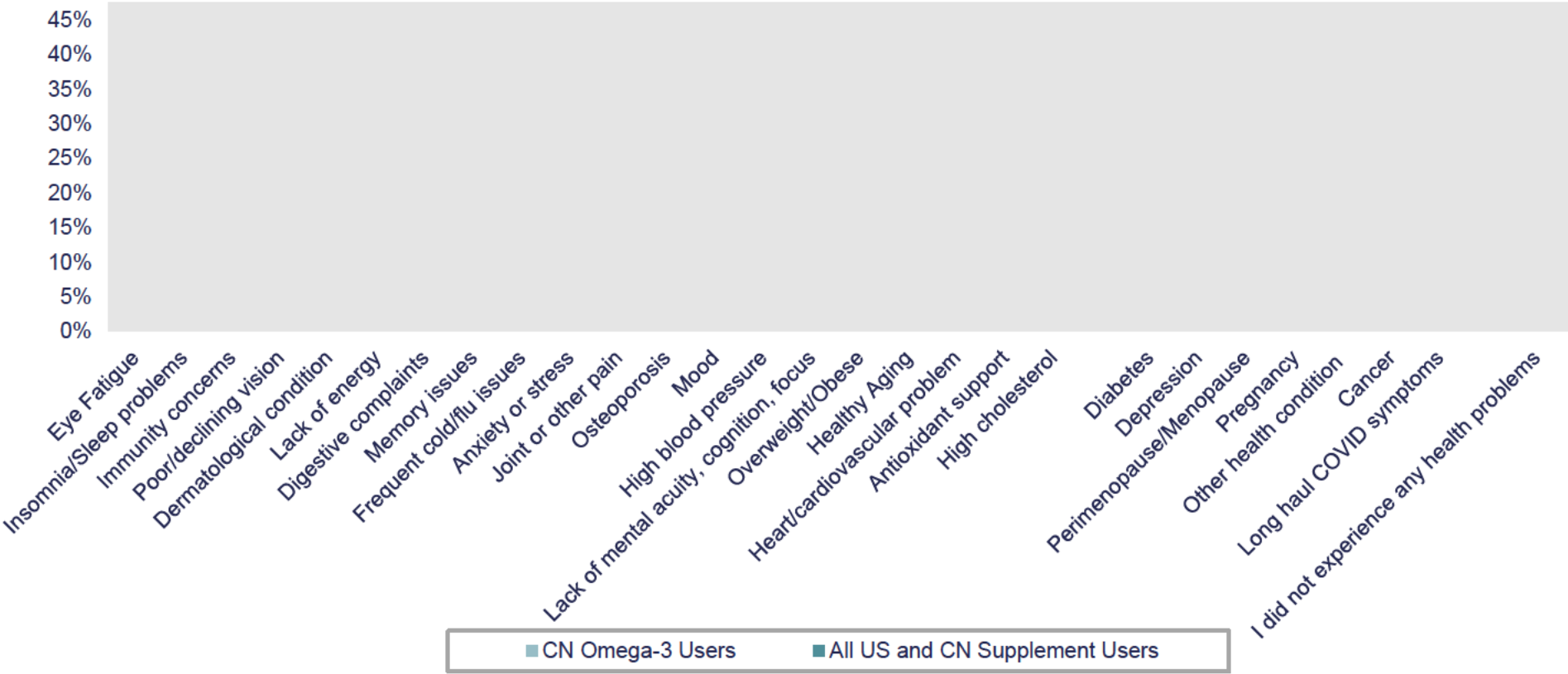
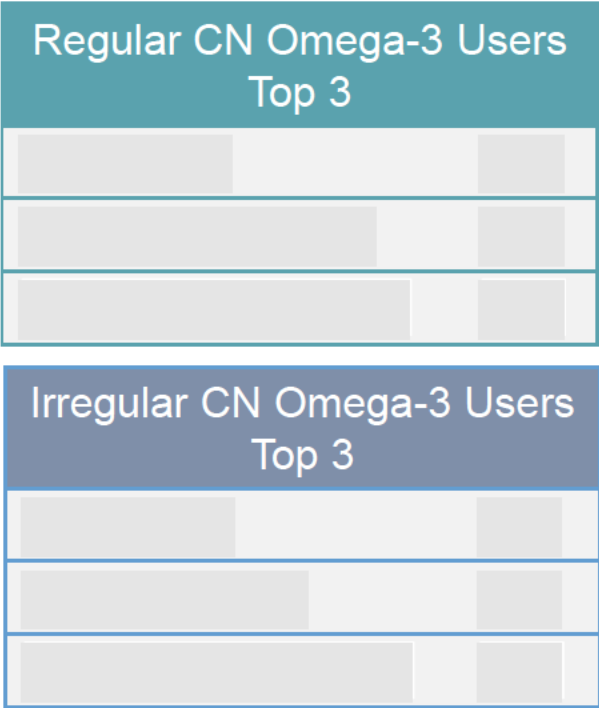
Note: US Omega-3 users n=697, all US and CN supplement users n=2038, US Regular omega-3 users indicated using supplement at least 4 times per week n=387, irregular omega-3 users n=253. Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

Omega-3 Users Health Concerns: China



KEY ITC INSIGHT:

- In China, overall supplement users as well as omega-3 users reported [redacted]
- Of concerns more associated with omega-3s, [redacted]



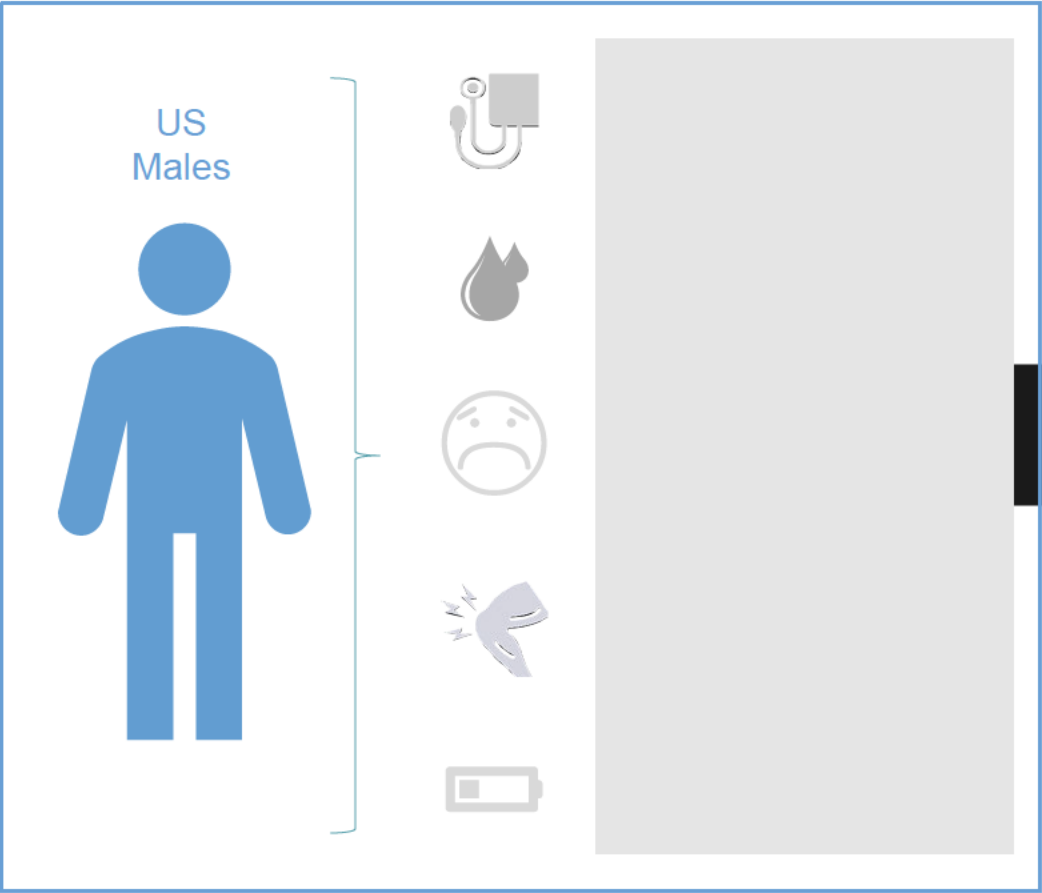
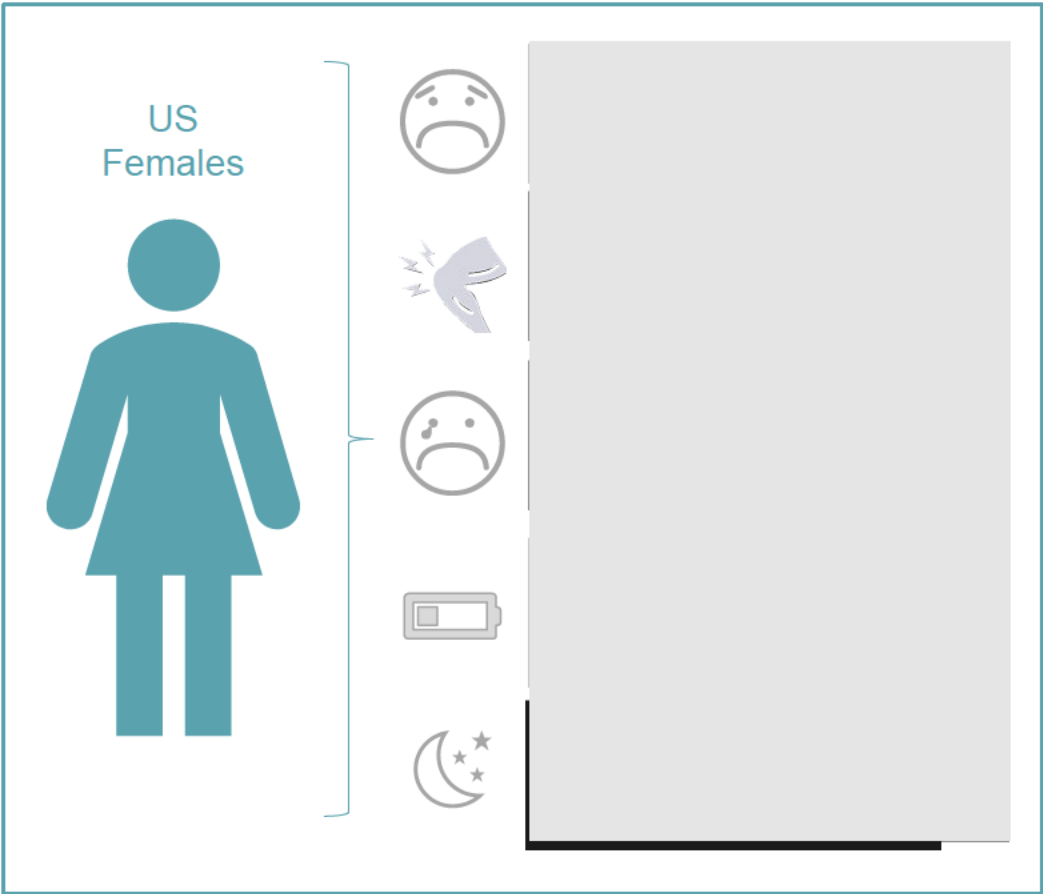
Note: CN Omega-3 users n=413, all US and CN supplement users n=2038, CN Regular omega-3 users indicated using supplement at least 4 times per week n=99, irregular omega-3 users n=292. Question: "Which of the following health conditions impact you currently or have impacted you within the past year?"

Omega-3 Users Top 5 Health Concerns: US



KEY ITC INSIGHT:

- US females over-indexed in almost all health concerns, [redacted] being the biggest differences
- US males responded more to concerns such as [redacted]

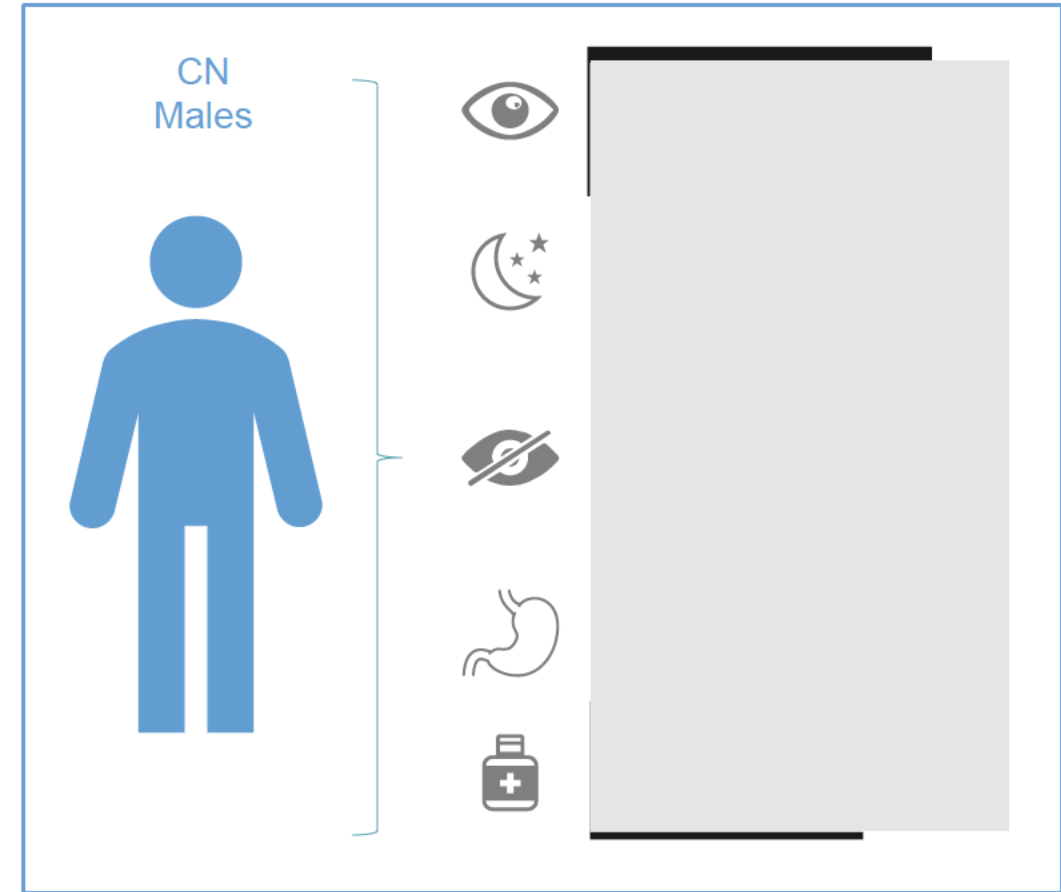
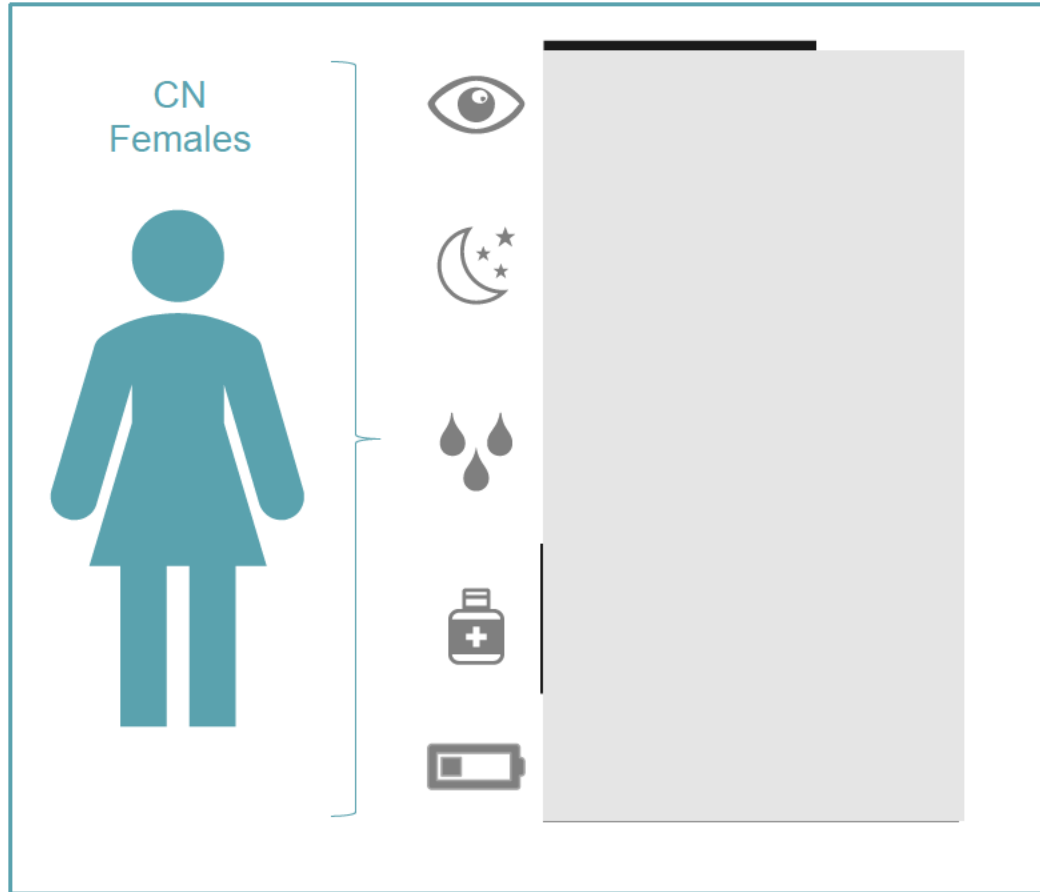


Omega-3 Users Top 5 Health Concerns: China



KEY ITC INSIGHT:

- [REDACTED] was the top issue for both genders in China, but didn't make the top 5 in the US.
- Between women and men, the biggest difference was that females' concern with [REDACTED] while men reported concern over [REDACTED]



[Pages omitted from sample]



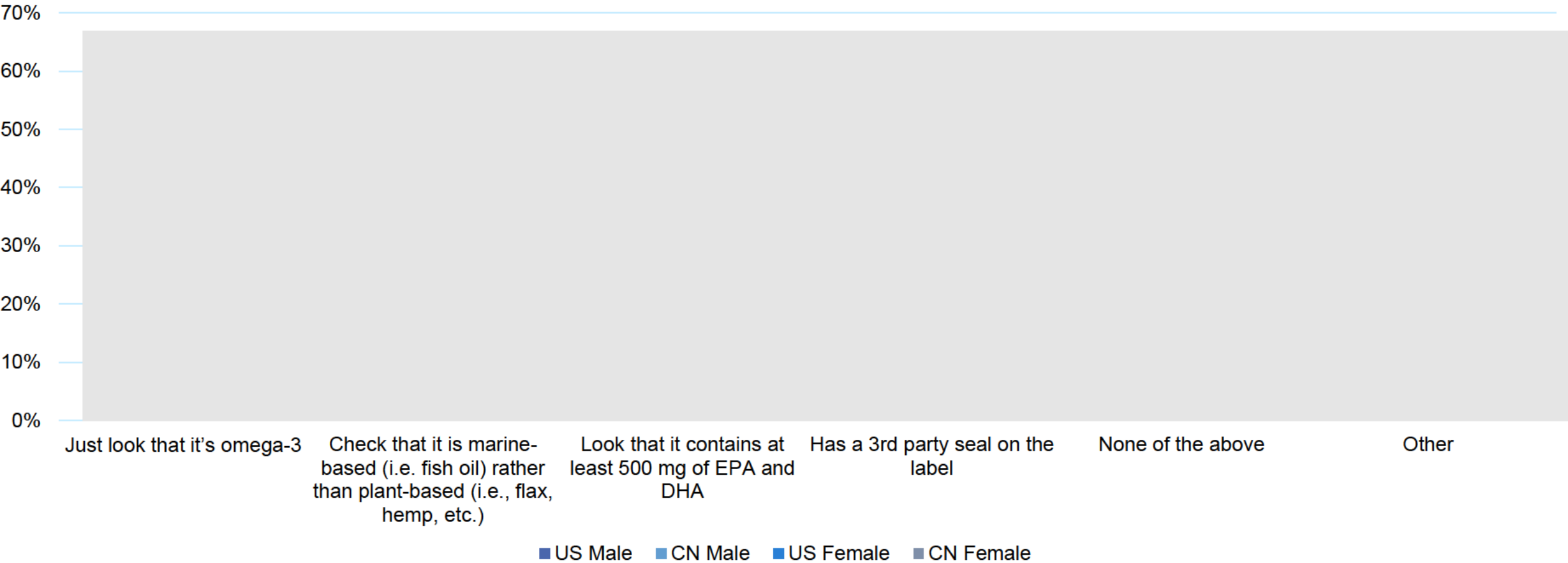
Omega-3 Supplement Users: Usage

What Characteristics Omega-3 Users Look For: Gender



KEY ITC INSIGHT:

- US consumers, particularly females, were looking for [redacted] while Chinese consumers looked specifically for [redacted]
- Chinese females ranked [redacted]



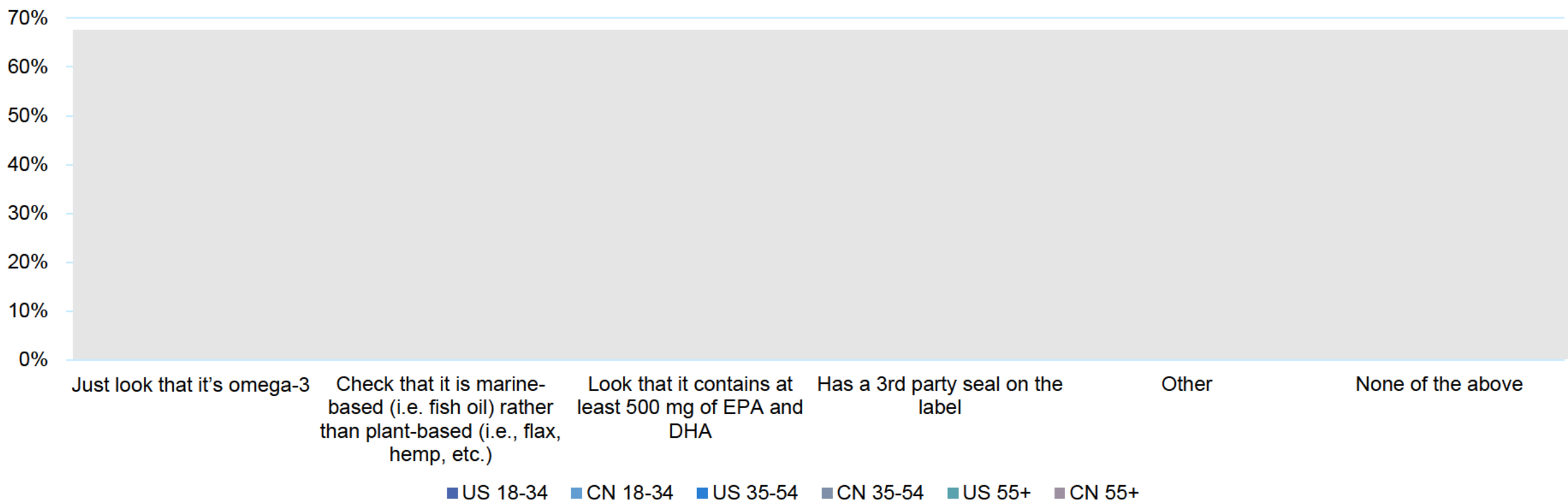
Note: Omega-3 US male n=363, CN male n=161, US female n=327, CN female n=252. Question: "When you select what omega-3 product to purchase, do you look for any of these specific characteristics?"

What Characteristics Omega-3 Users Look For: Age [SAMPLE]



KEY ITC INSIGHT:

- In all US age groups, looking for [redacted] was the top characteristic, although the younger group (18-34) was also concerned about [redacted]
- In China, younger age groups were looking for specifics of [redacted]



[Pages omitted from sample]

Omega-3 Supplement Users: Shopping Behavior

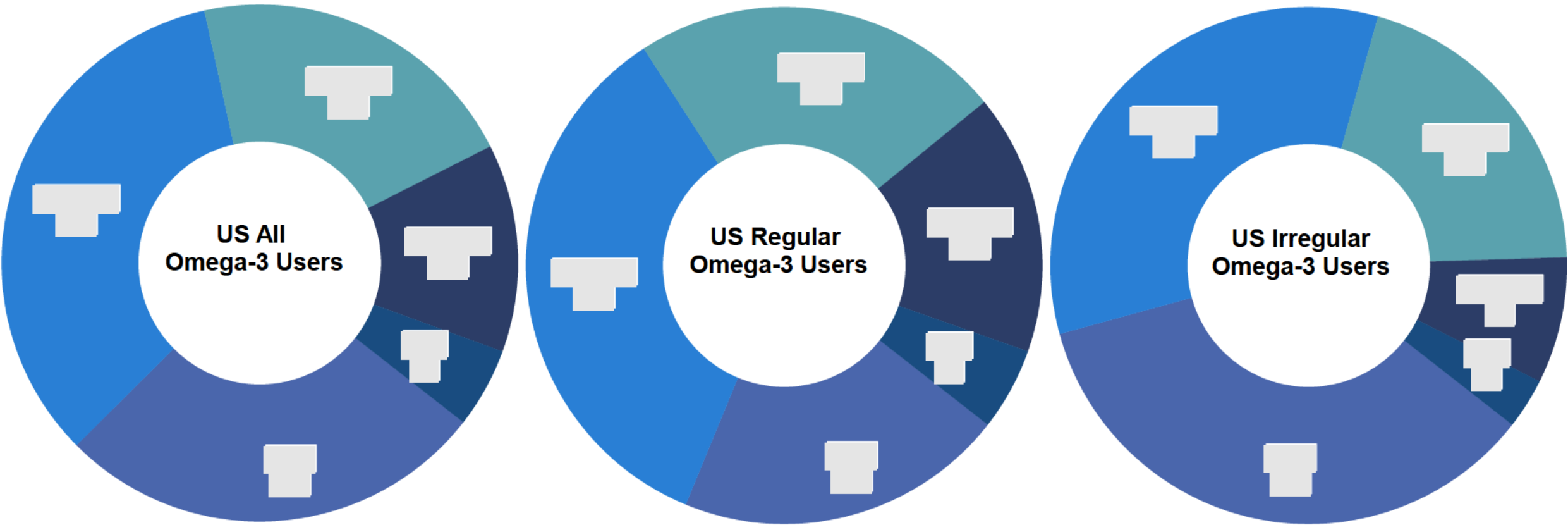


Average Monthly Spend: US



KEY ITC INSIGHT:

- [redacted] of US irregular users and [redacted] of regular users reported spending [redacted] per month on omega-3 supplements



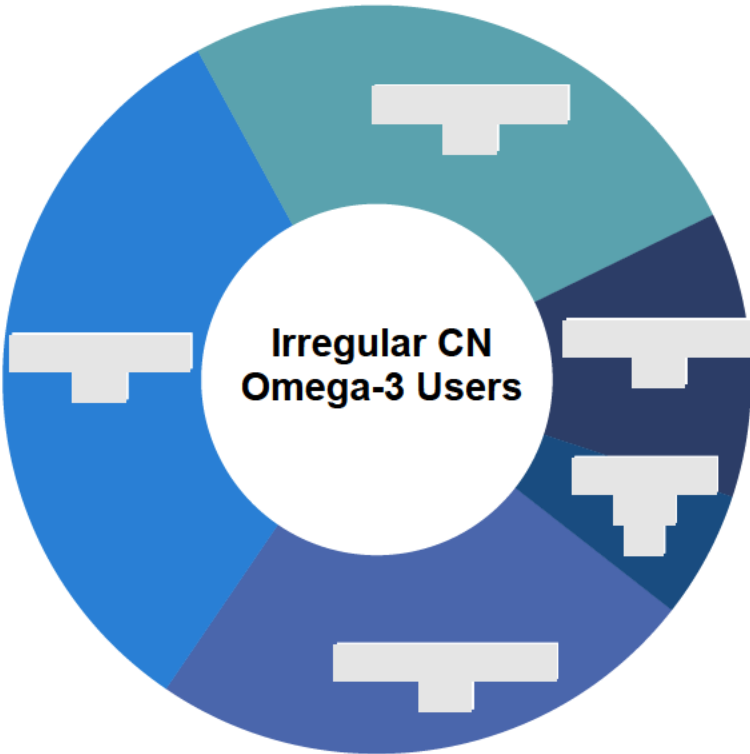
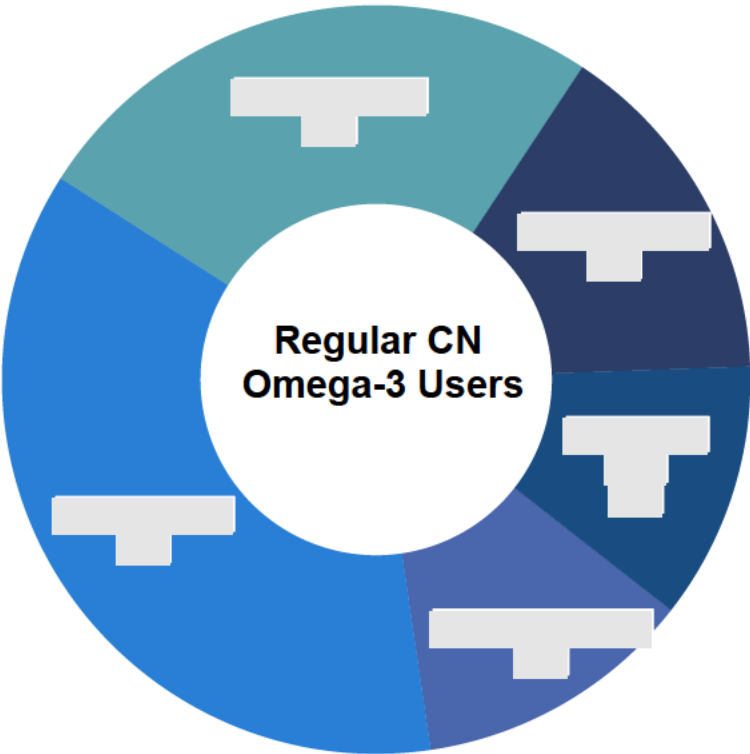
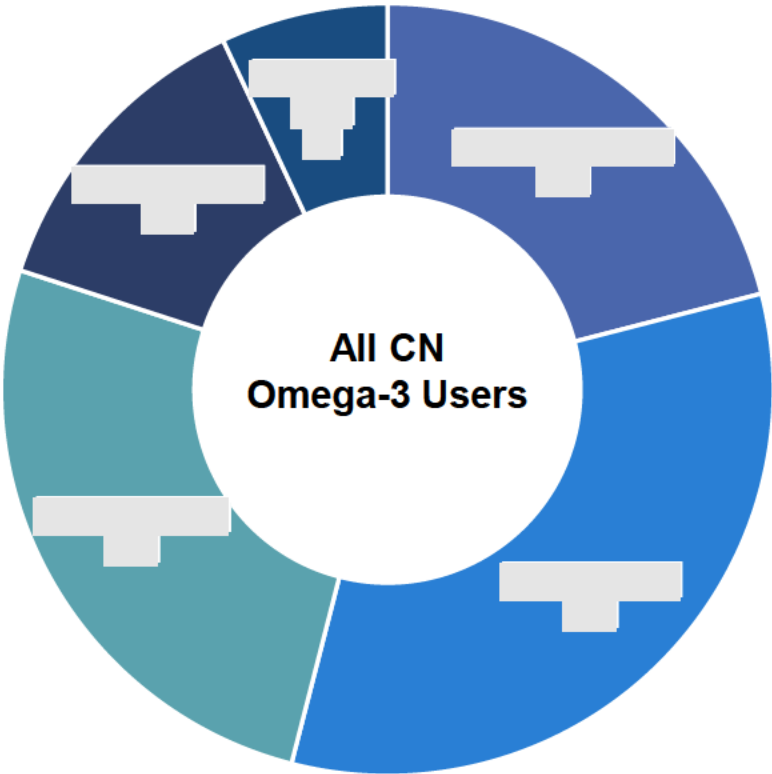
Note: US Omega-3 users n=697. US Regular users indicated using supplement at least 4 times per week n=387, irregular users n=253. Question "Approximately how much per month do you spend on vOmega-3?"

Average Monthly Spend: China



KEY ITC INSIGHT:

- Chinese irregular consumers were also spending [redacted], although this number is close in the [redacted]



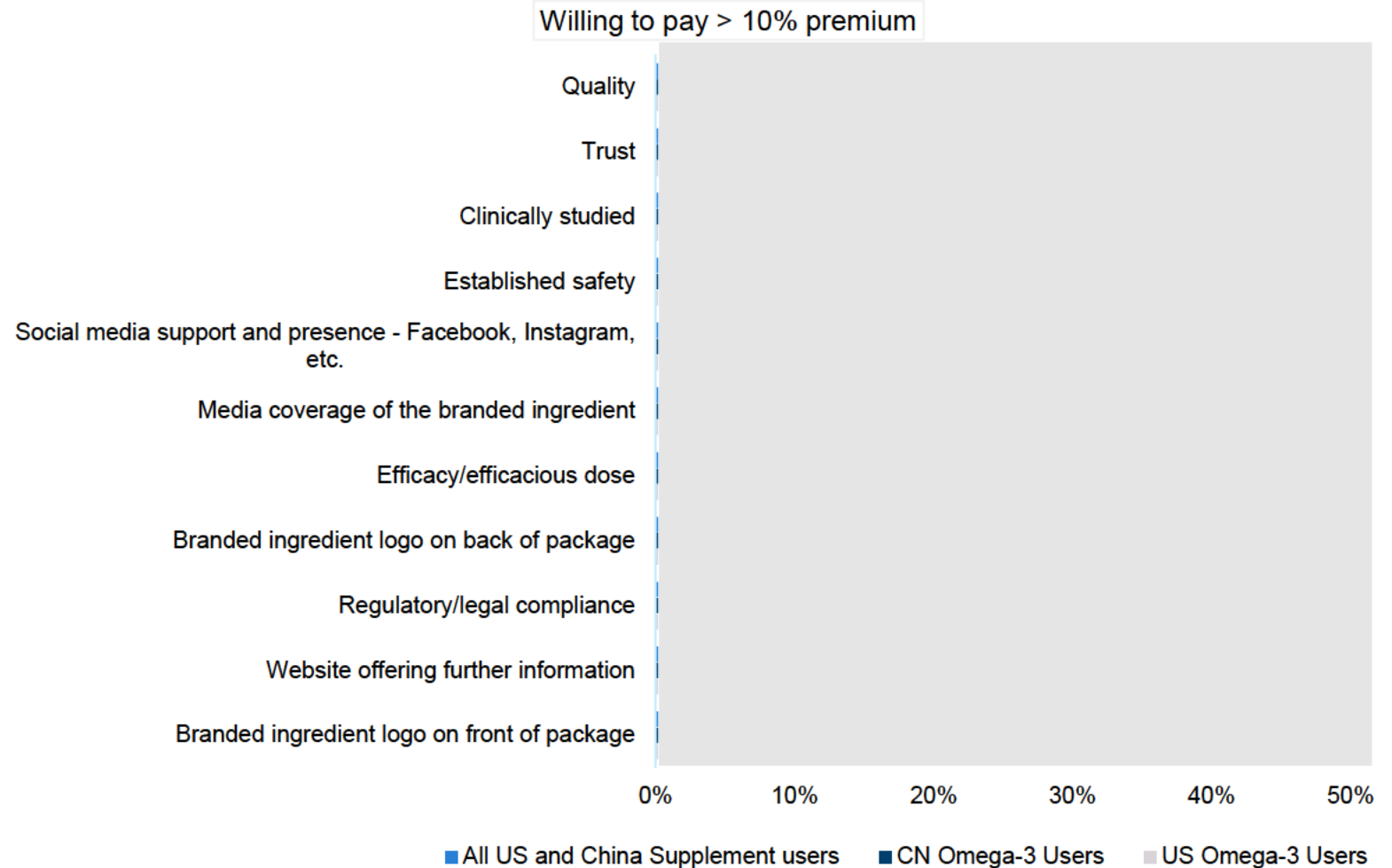
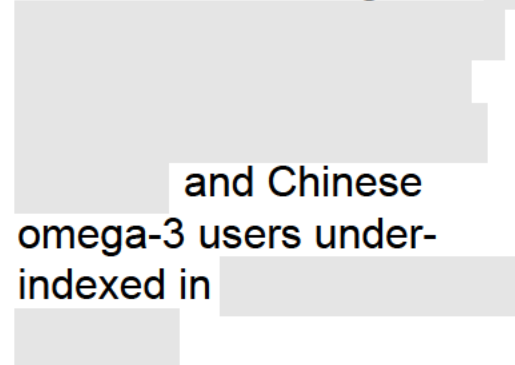
Note: All CN Omega-3 users n=413. Regular users indicated using supplement at least 4 times per week n=99, irregular users n=292. Question "Approximately how much per month do you spend on Omega-3?"

Branded Ingredient Price Premium



KEY ITC INSIGHT:

- US omega-3 users over-indexed in all categories



Note: Omega-3 users that appreciate branded ingredients n= varies by answer choice. Question: "When deciding which supplements to purchase, how much of a premium would you be willing to pay for the inclusion of a BRANDED INGREDIENT with the following features (versus the cheapest option available)?"

ny a Premium

- The biggest differences in ranked importance is for the US over China in , followed by in , with both of these responses ranking among Chinese users
- Conversely, Chinese users ranked much important (compared to US users)

Note: Omega-3 users that appreciate branded ingredients n= varies by answer choice. Question: "When deciding which supplements to purchase, how much of a premium would you be willing to pay for the inclusion of a **BRANDED INGREDIENT** with the following features (versus the cheapest option available)?"

[Pages omitted from sample]



Omega-3 Supplement Users: Transparency, Trust & Sustainability

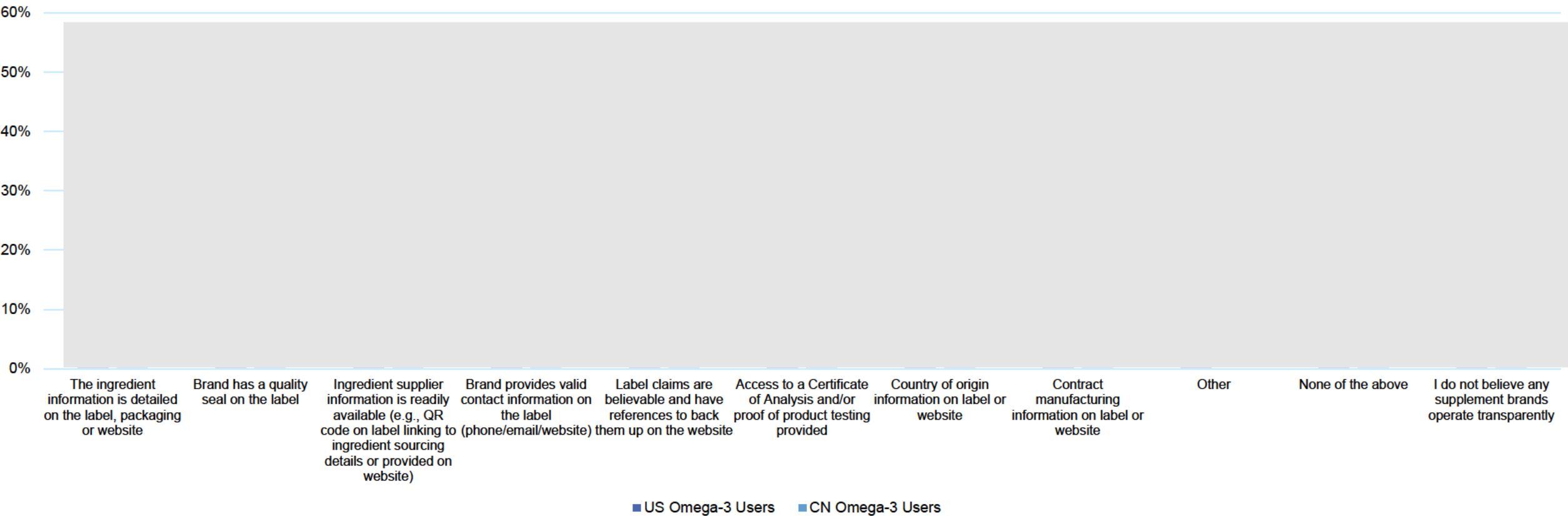


Signals of Brand Transparency



KEY ITC INSIGHT:

- Access to a Certificate of Analysis and/or proof of testing was [redacted]
- The C of A as a signal of brand transparency was [redacted]



Note: US Omega-3 users n=697, CN Omega-3 users n=413. Question: "Which of the following items are the strongest signals that a supplement brand is operating transparently?"

[Pages omitted from sample]