

Issue S4

Clean Label Enthusiasts® & Supplements



Clean Label Research Community Behavior Report

Supplements – Immunity Boosters

Diet Responses to Pandemic



Report Powered By:



**CLEAN LABEL
ENTHUSIASTS®**

An InsightsNow Community

Welcome to the Clean Label Enthusiasts® Quarterly Report

The free-from food movement is a multi-billion dollar shift in consumer behavior that is impacting companies within the consumer packaged goods industry. To know how to effectively respond to this movement, InsightsNow has launched a long-term research initiative applying behavioral science to generate insights for faster, more informed clean label decisions. Please read on to find the results of our 2nd Quarter 2020 Report on Clean Label Enthusiasts & Supplements.

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Clean Label Enthusiasts® & Supplements

Overview:

Clean Label Enthusiasts (CLE) are a behavioral segment, differentiated by their attitudes and avoidances of products with artificial ingredients and other additives that they believe are unhealthy. They tend to read ingredient labels and avoid brands due to these concerns. CLE comprise 27% of the US general population.

Not only do CLE tend to read labels, they also exhibit concern about chemicals and avoid **"unhealthy"** brands. All CLE shoppers state that clean label concerns impact their shopping choices, versus only 22% of Non-CLE shoppers. 76% state that they avoid buying brands to avoid **"bad/unhealthy ingredients"** versus 22% of Non-CLE.

Study Details:

We conducted an online survey with 387 Clean Label Enthusiasts from June 8-10, 2020. Participants completed a questionnaire that examined how, why, and in what forms they consume supplements such as multivitamins. They also completed an Implicit/Explicit Test™ to gauge their association of ingredients with immunity.



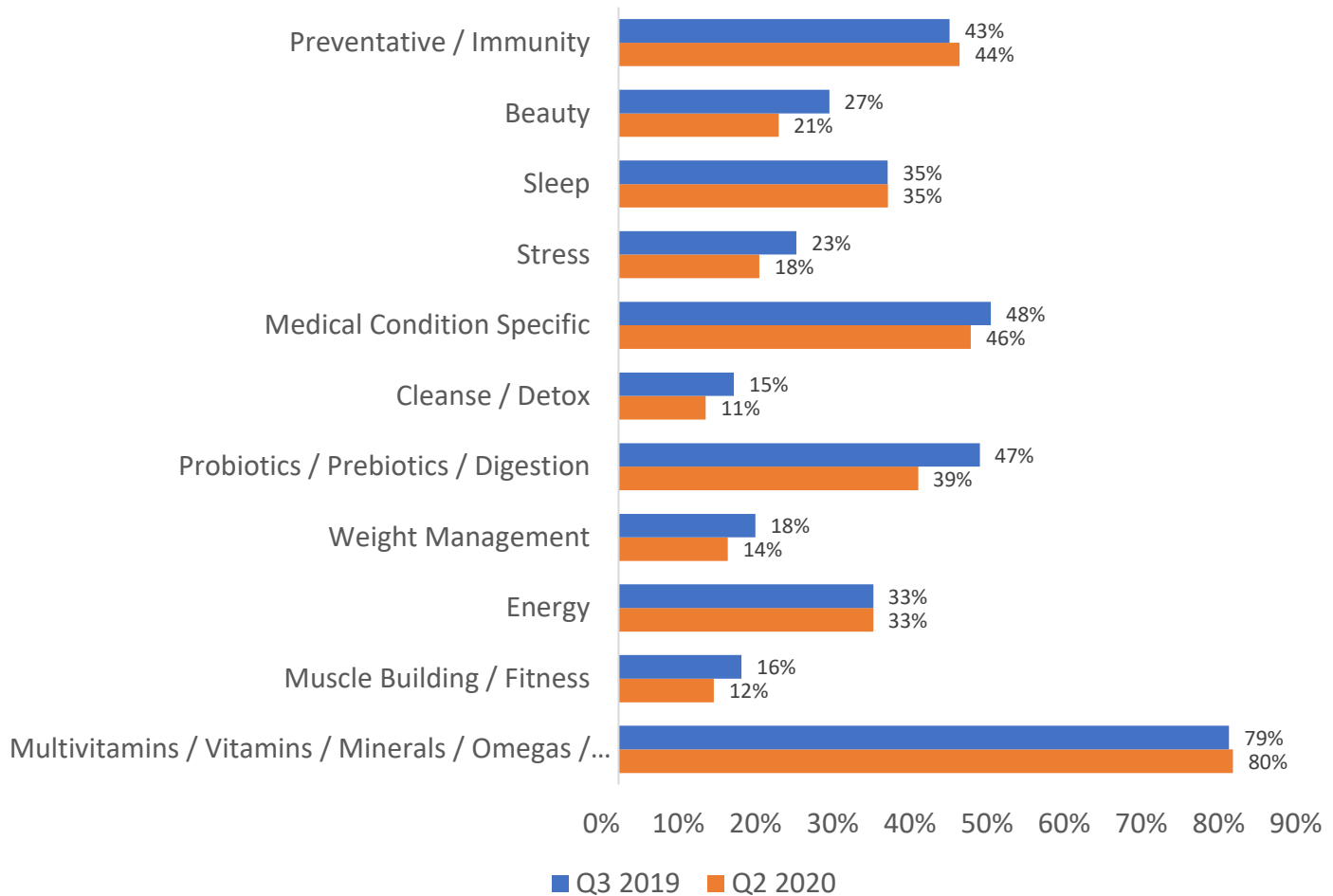
Summary of What We Learned

- ✓ Clean Label Enthusiasts® are increasing their consumption of products and supplements that will support their immune system. This began in the early stages of the COVID-19 pandemic, and still continues.
- ✓ Most other categories of supplements have seen decreased usage during the COVID-19 pandemic.
- ✓ Vitamin C is the most widely used as well as most known ingredient to support immunity. CLE have increased their intake of Vitamin C as well as products that they consider to contain this ingredient.
- ✓ Purchase locations of supplements has shifted. No longer is going to the store to pick up supplements the most chosen method, there is a substantial shift to online ordering and store pick up options.
- ✓ Other ingredients that CLE associate with immunity besides Vitamin C are turmeric and ginger.



COVID-19 and Supplements Categories Purchased

Categories of Supplements Purchased in Prior 3 Months

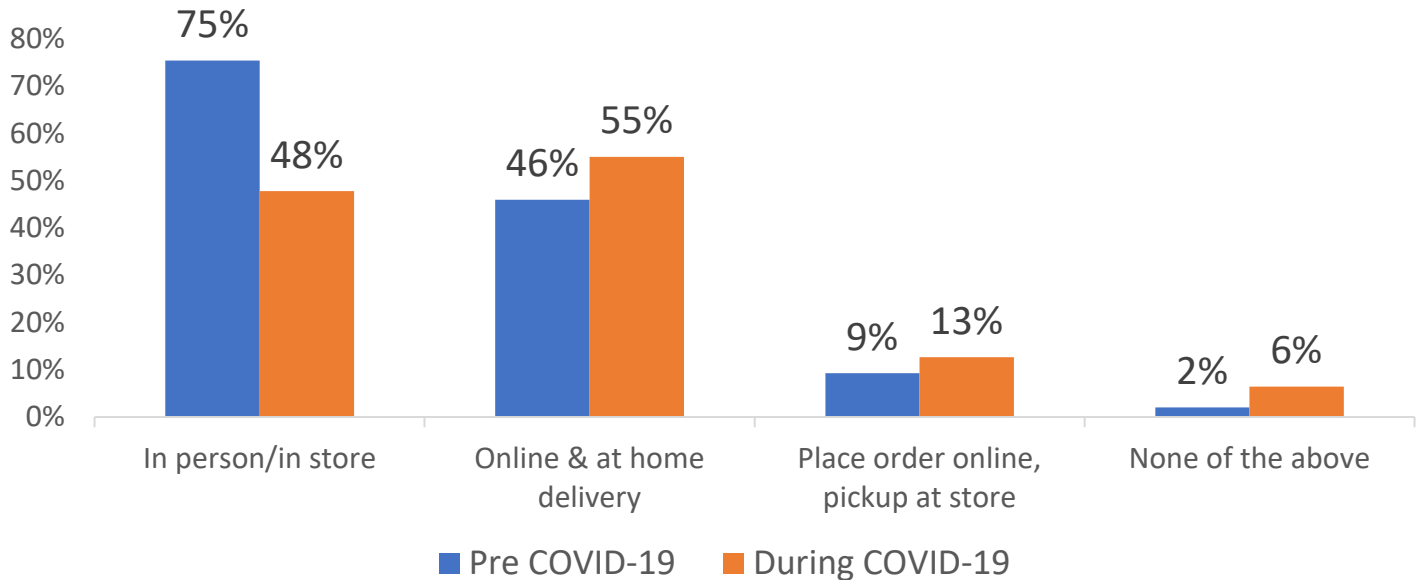


Most categories of supplements have seen their usage decline over the past 9 months. The exceptions are general vitamins and other nutrient supplements, and preventative/immunity supplements which have increased. This shows how CLEs have shifted their priorities since the COVID-19 pandemic began towards immunity and maintaining their health. Looking towards the future, it is unlikely the declines will reverse until either the COVID-19 concerns are assuaged or people return to daily routines that are more similar to the ones they followed before the pandemic.

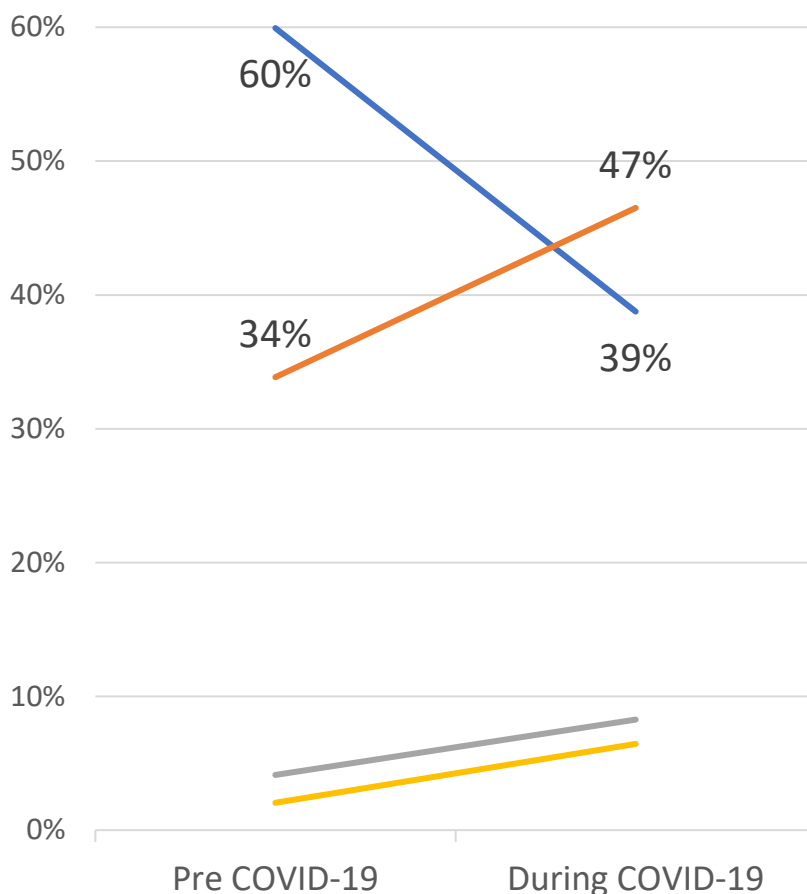


COVID-19 and Supplement Purchase Channels

Channels Used to Purchase Supplements



Most Frequent Purchase Channel



CLEs have changed how they purchase supplements. Prior to the COVID-19 pandemic, 3 out of 4 CLE were picking them up in a store in person. This has now shifted to less than half going to a store and picking up the products, and there is an increase in online and at home delivery. With the push to avoid contact, this is not surprising. The most frequently used channel is online and at home delivery, which has replaced in store/in person.

How Do Clean Label Enthusiasts® Ensure Immunity?

Defining
Immunity:

"The ability of the body to resist and fight off infections and diseases."
- a Clean Label Enthusiast

From a series of qualitative interactions with Clean Label Enthusiasts, we learned they approach immunity from two approaches: protecting it and strengthening it.



Protect



Staying away
from others

Wearing face
masks/gloves



Washing
hands more
often



Getting
enough sleep



Exercising
more



Strengthen

To go beyond just protecting their immunity, CLEs are trying to strengthen their immunity with foods and supplements.



Foods & Diet



Supplements

"I have increased the amount of green vegetables I consume. I take D and B12 supplements along with a probiotic."

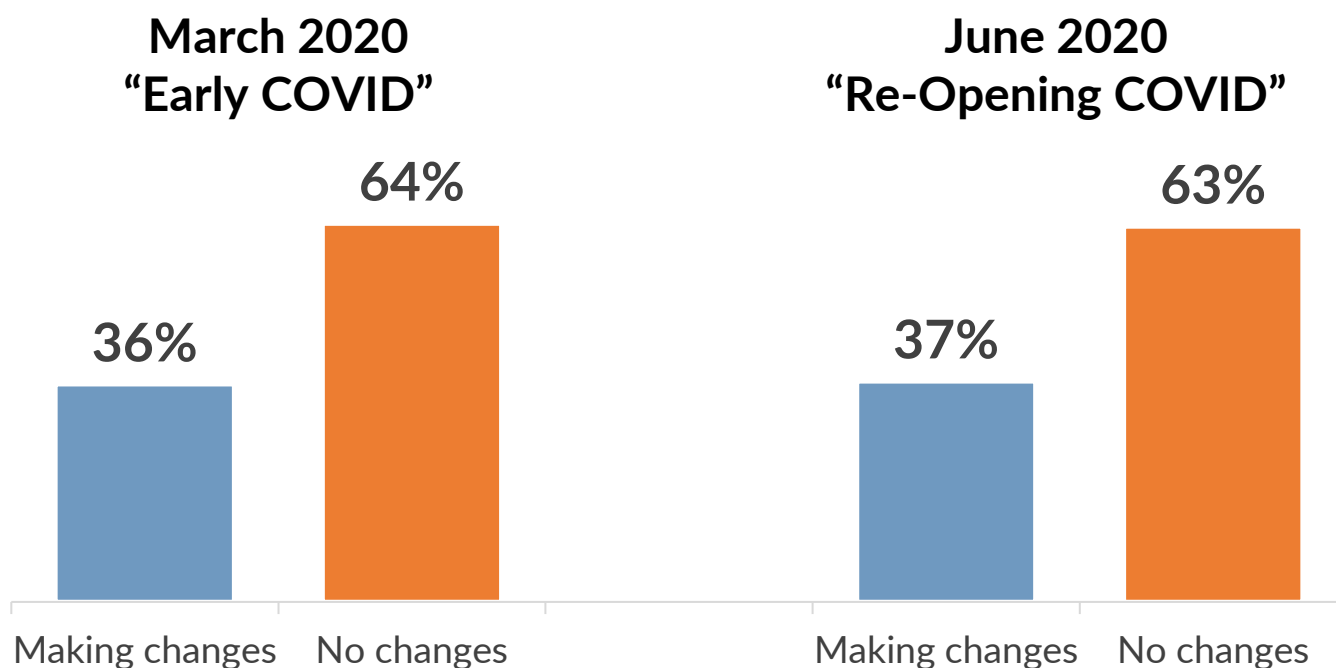
"During the pandemic I have been taking more single letter vitamins to strengthen my immunity."

"Eating fresh fruits & vegetables... drinking lots of fresh cold-pressed vegetable juices."

"I sometimes get lazy about consistently taking supplements, but I'm putting in extra effort to remember daily plus have added some extra immunity boosters like Vitamin C and Zinc along with my usual multi-vitamin."

Is COVID-19 Influencing Clean Label Enthusiasts® Diets and Supplements?

Have you made any changes to diet or supplements to boost your immune system or help keep yourself healthy recently?

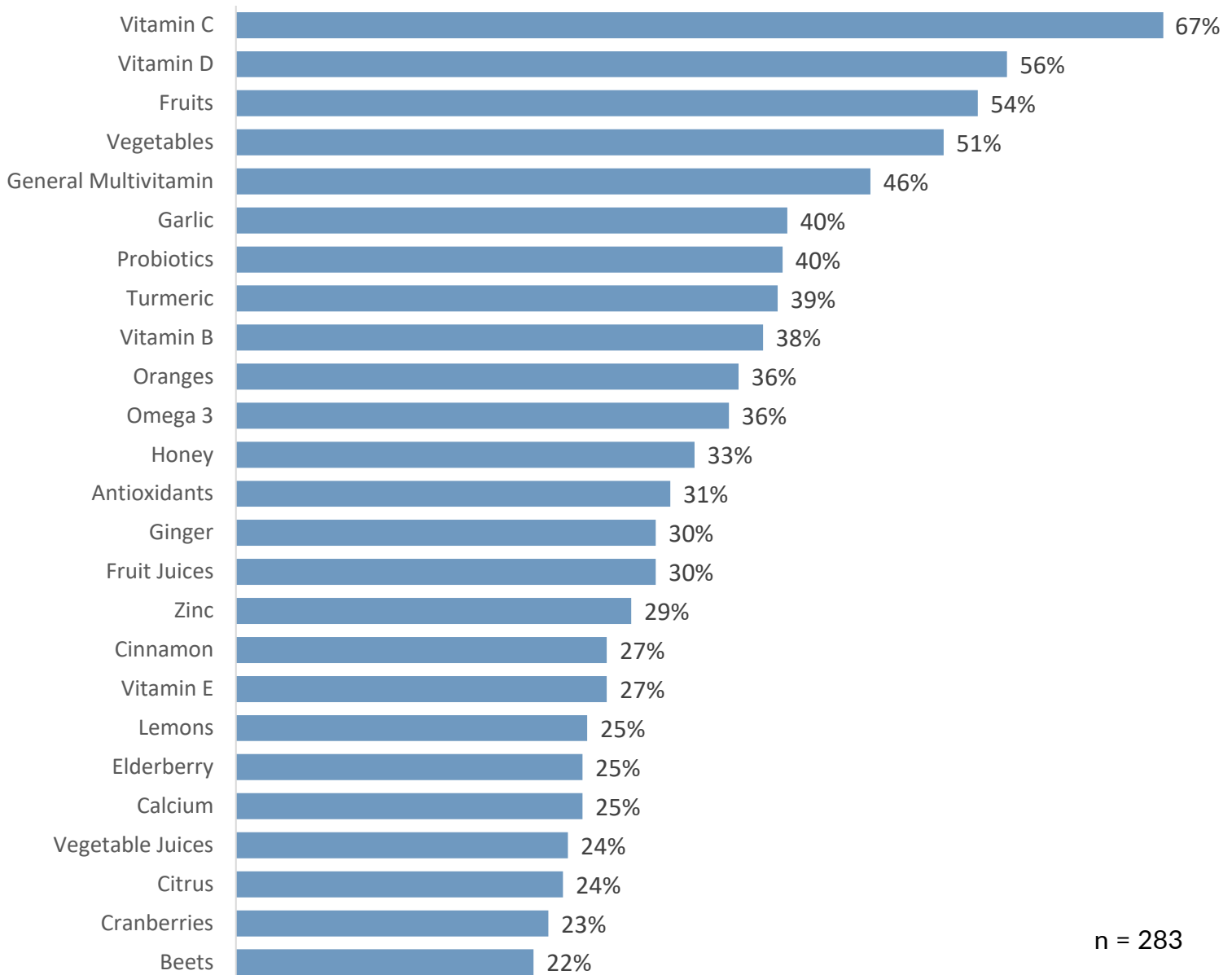


Amongst Clean Label Enthusiasts®, there is a group taking action in the face of COVID-19 by making changes to their diet and supplements to boost their immune system and stay healthy. In March 2020, when COVID was just surfacing in the US, more than 1 in 3 CLE's said they recently made changes to their diet or supplements to keep healthy. More recently in June 2020, a slightly larger percentage mention that they have recently made changes to stay healthy. This indicates that CLE will continue to modify their diet and supplements to boost their immune system and adapt to the current state of COVID in the US.



Immunity Supporters used by Clean Label Enthusiasts®

What do you consume for the purpose of providing support for your immune system? (>20% usage shown)

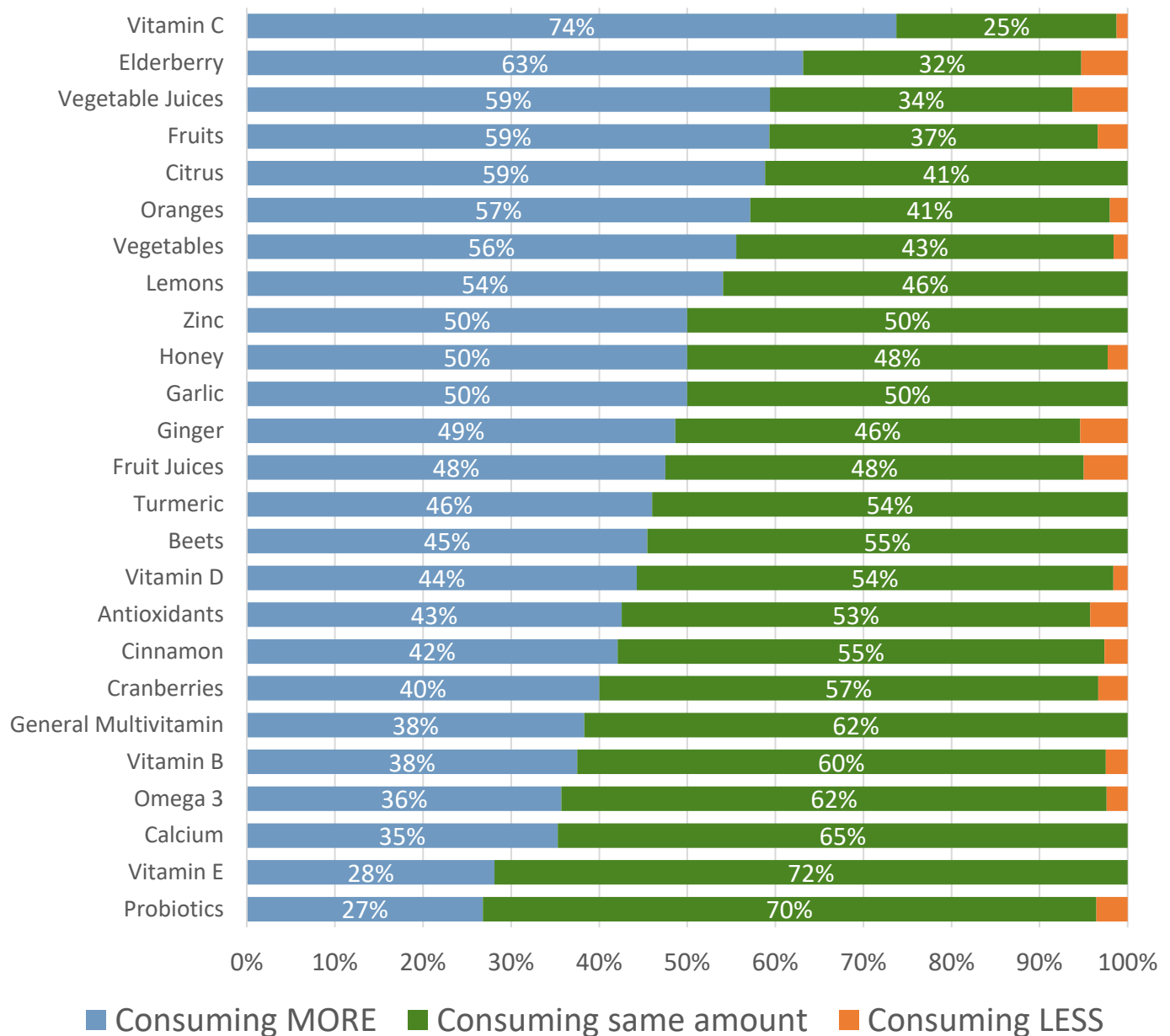


Vitamin C was the most often mentioned by Clean Label Enthusiasts as being something they consume to provide support to their immune systems. The other leading ingredients and foods are Vitamin D, fruits, vegetables, and general multivitamins. However CLE's had a wide diversity of other specific foods and nutrients they consume in addition to the most popular.

Changes to Clean Label Enthusiasts® Immunity Supporting Foods & Vitamins due to COVID-19

How have your changes in response to the COVID-19 pandemic affected how much you consume of the following for immune support?

Asked of CLE's who consume each of the ingredients for immune support



To boost their immunity against COVID-19, CLE are consuming more Vitamin C and fruits such as oranges, lemon and citrus that are known to contain Vitamin C. They have also increased usage of elderberry, vegetable juices, and other foods.

Implicit/Explicit Test™ Methodology

Please indicate whether each ingredient supports the claim that a food, beverage, or supplement provides immune support.

VITAMIN A

YES NO

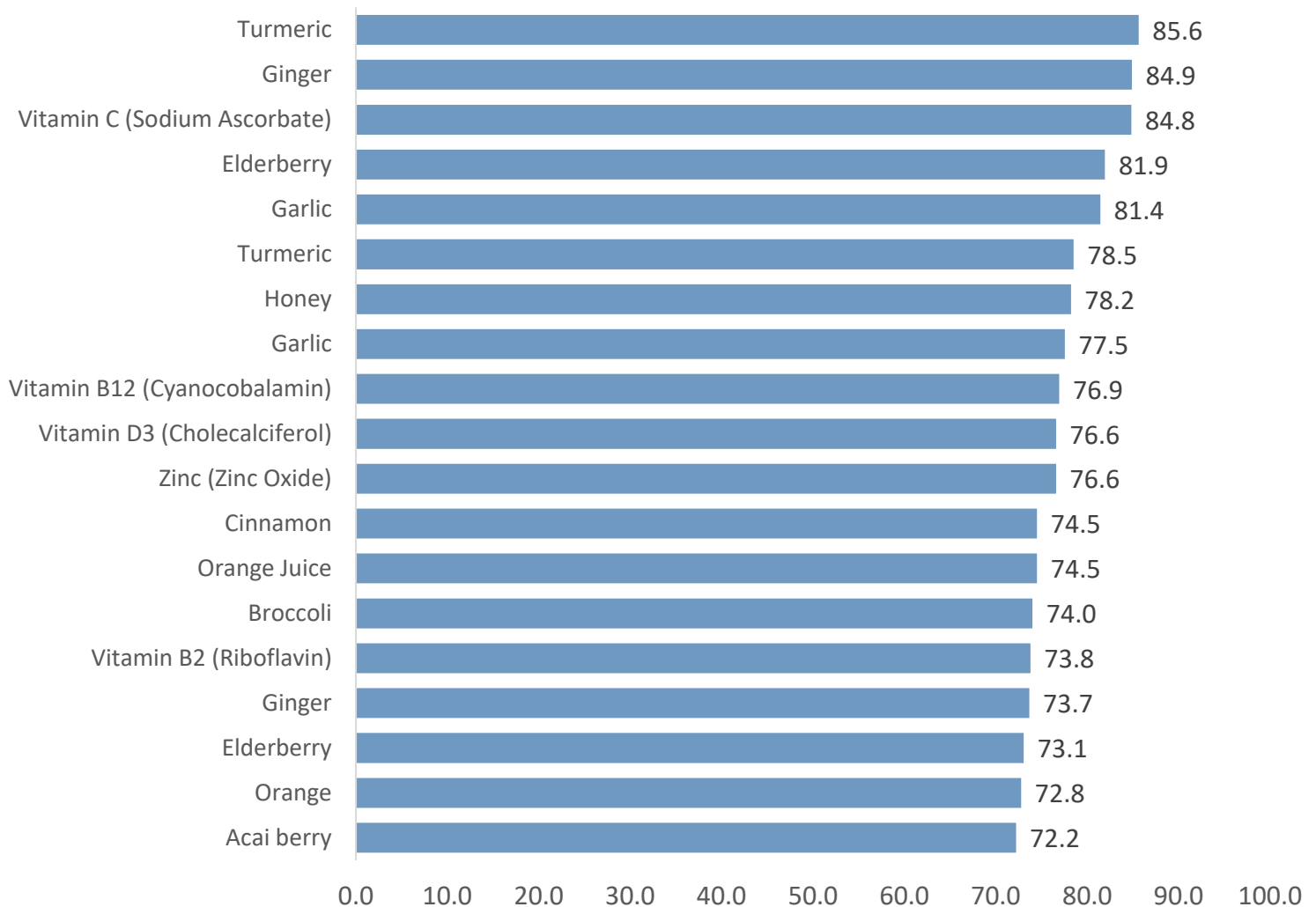
Implicit Behavioral Measures
% Avoid and Time to Respond

In order to measure CLE consumers' associations of ingredients with immune support, we conducted an Implicit/Explicit Test™. Participants were shown a list of ingredients, one at time, and asked to select "Yes" or "No" as quickly as possible. Their choice and reaction time were used to calculate an implicit score for each ingredient. Higher implicit scores indicate that participants were more likely to implicitly associate an ingredient with immune support while lower implicit scores indicate that they were more likely to implicitly reject the association of an ingredient with immune support.



Immune Support Associated Ingredients

Top Ingredients Associated with Providing Immune Support



An implicit/explicit association test was executed with a number of ingredients that are identified in online media as possibly providing immune support. From that implicit/explicit association test, the various ingredients are scored on how strongly CLE's associate the ingredients with immune support. Turmeric, Ginger, Vitamin C (Sodium Ascorbate), Elderberry, and Garlic garnered the highest scores, signifying that they have the most recognizable association with immunity.



To our valued subscribers:

We are excited to provide this issue of our CLE Behavioral Report on Supplements. This report provides some important insights into how consumers are taking supplements to boost their immune systems in response to their coronavirus concerns. These results show that CLE consumers are interested in boosting their immunity and look for products that contain ingredients that will support this. They are shifting their purchase locations away from on location stores as well.

We look forward to providing additional insights through subsequent issues to help you achieve more rapid informed clean label supplements decisions.

As always, we welcome your input about how future issues can be of further value in helping you overcome the challenges of the clean label movement.

Sincerely,

Dave Lundahl, Ph.D.
CEO, InsightsNow, Inc.

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