

Consumer and brand expectations

Exploring the Pharma
/Nutra Intersection

November 17 2021

What we do

Two decades of pioneering innovation

Grasp your innovation journey

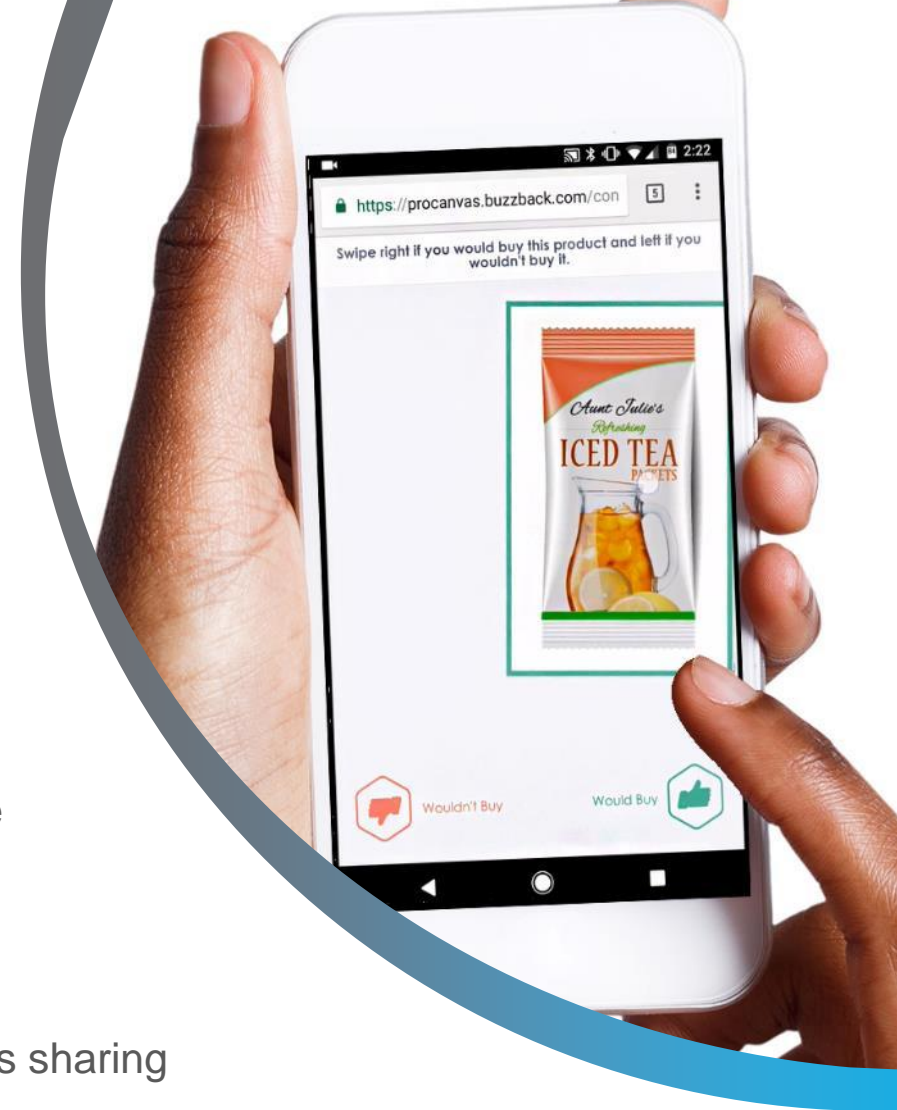
Consumer centric – empathetic to how people live not just buy

Interactive & in the moment – game-like techniques to drive engagement

Relentlessly focused on why – with subconscious, emotional understanding

Visual & ready to activate – for seamless sharing

Agile & reliable – Spot on. Every time.



Innovation insight on behalf of leading brands

Including Plant-Based & Botanicals

Mondelēz
International

Keurig
DrPepper

Fi Global
insights

H HORIZON
P H A R M A

Pfizer

GRUPO
BIMBO

pepsi

TACO
BELL

Vitafoods
Insights



gsk
GlaxoSmithKline

AstraZeneca

Lundbeck

KraftHeinz

Nestlé

bel

Coca-Cola

Dole

IHop

Johnson + Johnson

abbvie

GALDERMA

Otsuka

Nestlé
Health
Science

BDF
Beiersdorf

DANONE
ONE PLANET. ONE HEALTH

DAHI!
ORGANIC

PHARMAVITE

Snacking
Meals
Beverages
Functional
products
Supplements
Skin care
Personal care
Apparel
Packaging

SANOFI

Alcon
A Novartis
Division

NOVARTIS

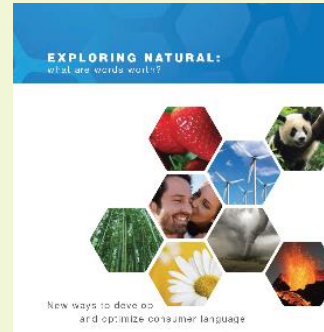
J&J

Beiersdorf

LANE — EIGHT

Our 10-year journey

Conducting our own research



2009
Exploring Natural



2012
Natural Follow-Up



2016
Sustainability



2018
Clean Label



2019-2020
Trendy Ingredients Plant-based



2020-2021
Plant-Based & Botanicals





\$382.5B
2021

Growth of Pharma Nutra products

\$722.6B
2026

One Year of COVID Behavioral & Emotional Insights

30,000+ N

30+ Waves



Unprecedented shift to digital

Major changes impacting long-term



Consumer Sentiment Trends

MENTAL HEALTH

50%

Worried mental health impacts are here to stay

SKINCARE

8% US

7% UK

Plan to continue less intensive skincare routine

ALCOHOL Future Plans

1/3

Drink LESS

17%

Drink MORE

TV/STREAMING



40%

Acquired a new streaming service during COVID



13% US
19% UK

Plan to cancel subscriptions later

PARENTING

Parents taking more time for themselves vs year ago



US

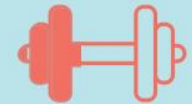


UK

April '21

April '20

EXERCISE



31% US 28% UK
Not planning to return to gym

DIET/ SNACKING

55%

Ready for new eating habits post-COVID

TRAVEL



46%
US



60%
UK

No longer concerned with catching virus when traveling

Forward looking generational lens



70% Label driven

Increase in reading labels, focus on ingredients



Millennials & Gen Z heightened awareness

More label obsessed & environmentally driven



Millennials in next life stage

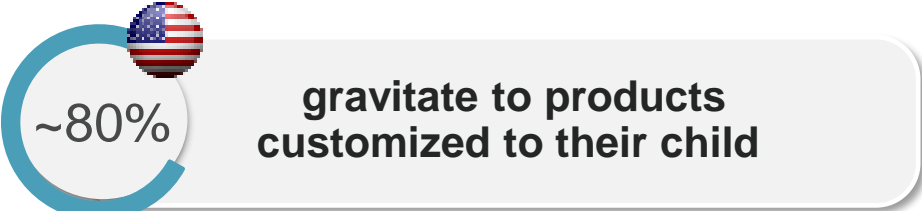
Driven by their Gen Alpha children



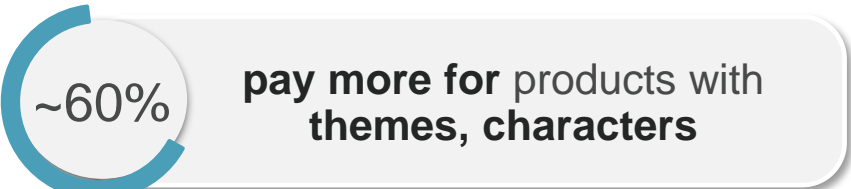
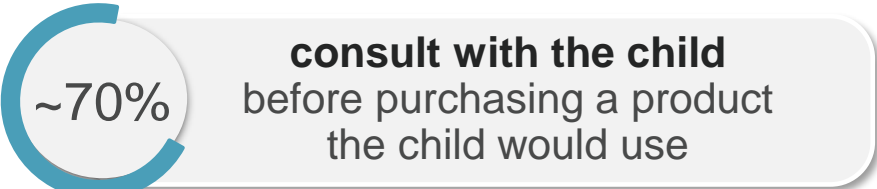
Brand fickle [or less loyal] – changes to trust factors

New influencers of behavior, such as financial & open-ness to upstart brands

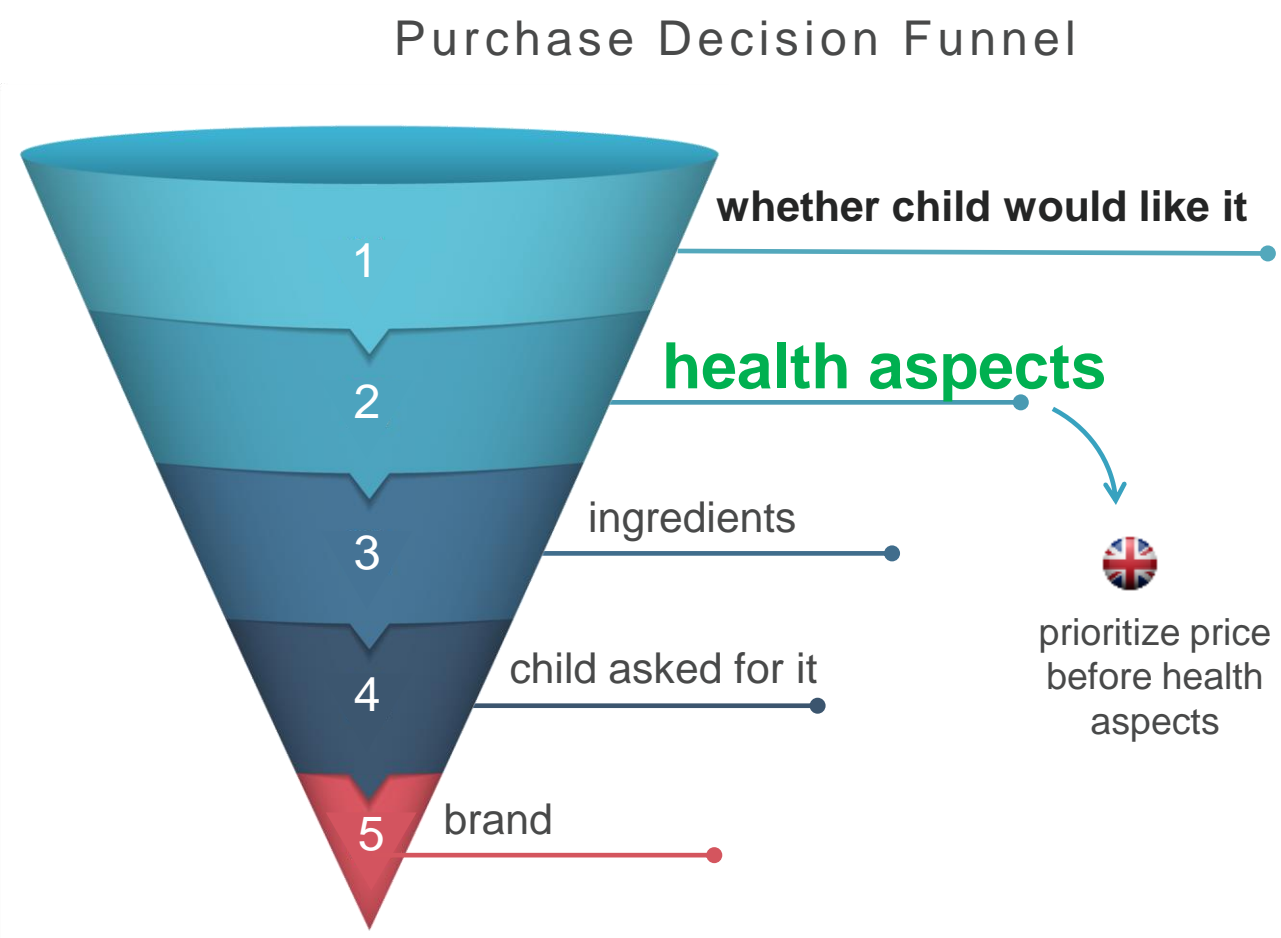
How Gen Alpha are driving parents' purchases



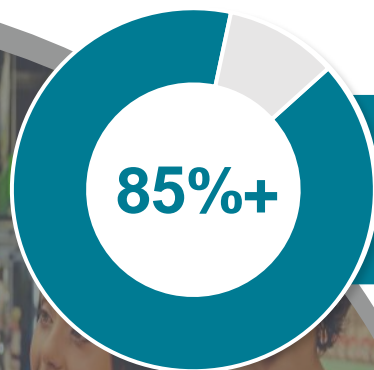
55% in



55% in



Awareness of Pharma/Nutra ingredients high...

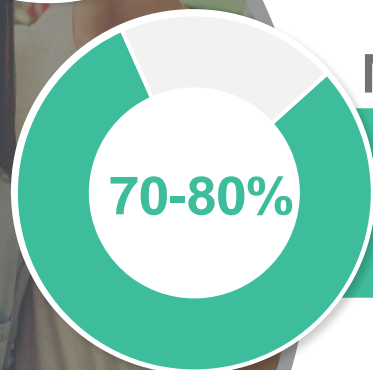


Higher Awareness

Probiotics
Magnesium
Essential Oils



Turmeric
Omega-3



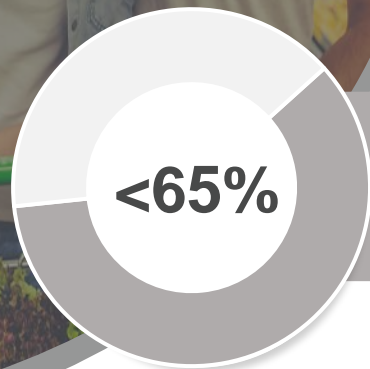
Medium Awareness



Plant-based
Melatonin



Hemp
Collagen



Lower Awareness

Elderberry
Activated Charcoal



CBD
CoQ10



Protein infused
drinks/foods

  = Considerably higher than the other market

Probiotics

Essential Oils

Omega-3

Hemp

Melatonin

Magnesium

Turmeric

Activated Charcoal

Collagen

Protein infused
drinks/foods

CBD

Understanding lacking, but open to trying

About **1/3** have
complete understanding
of benefits



1/2 or more
say they have **heard of**
AND
are open to products
with these ingredients

Level of
Familiarity
&
Interest

Consumers seeking health benefits – consistent & category dependent



**~65%
Stress relief**

~30-50%

Pain management
Anxiety/depression
management
Sleep aid
Anti-inflammatory



**~45-50%
Personal Care
Benefits**

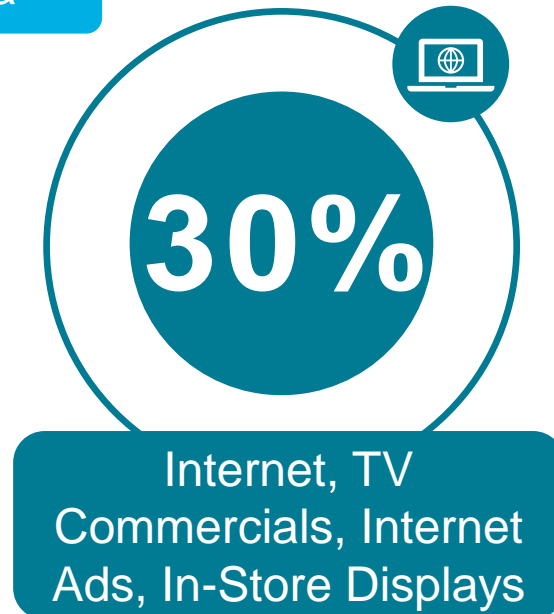
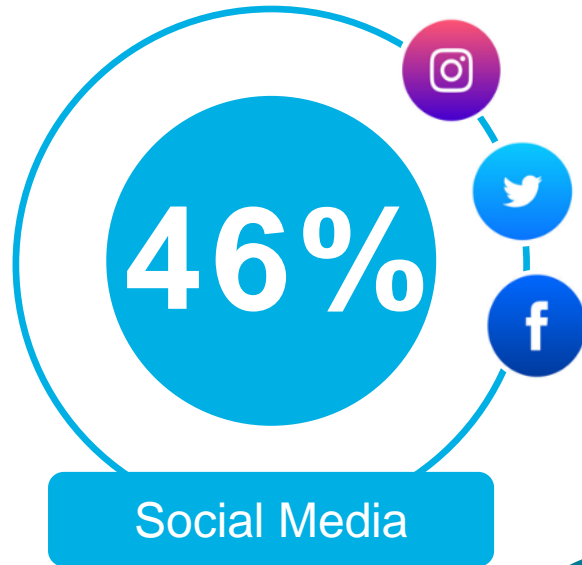
Skin improvement
Acne treatment
Teeth whitener



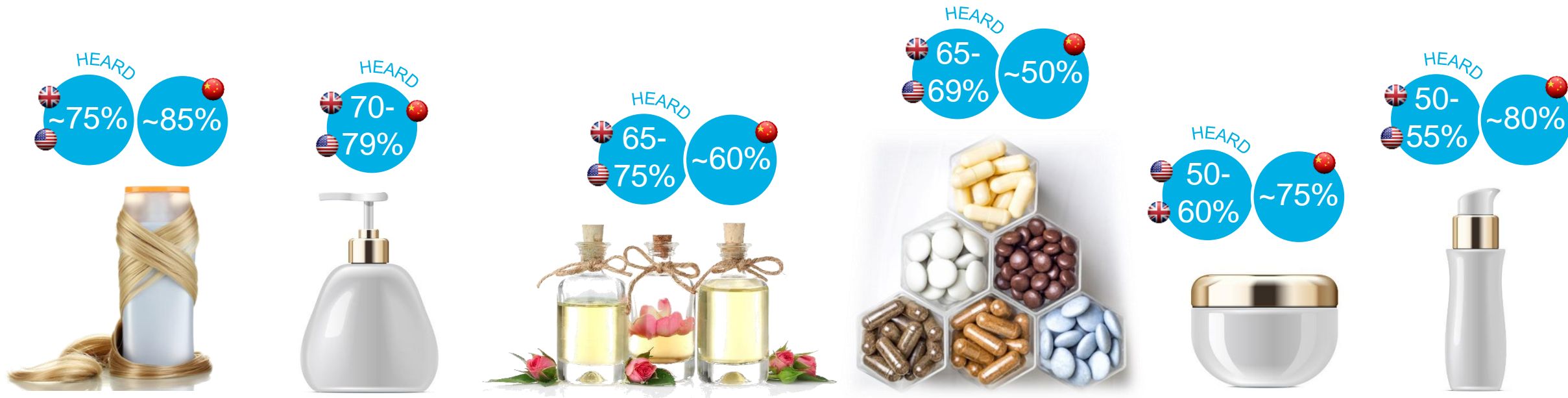
**~25-65%
Health/ Wellness
Benefits**

Digestive health
Immune support
Weight management
Skin health
Cardiovascular health

Social media still main source of information



Hair care & body lotion top botanicals in personal care; aromatherapy and supplements also popular in US & UK



**Shampoo/
Conditioner**

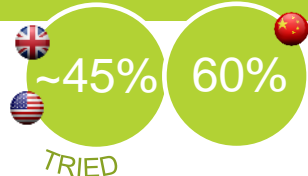
Body lotion

Aromatherapy

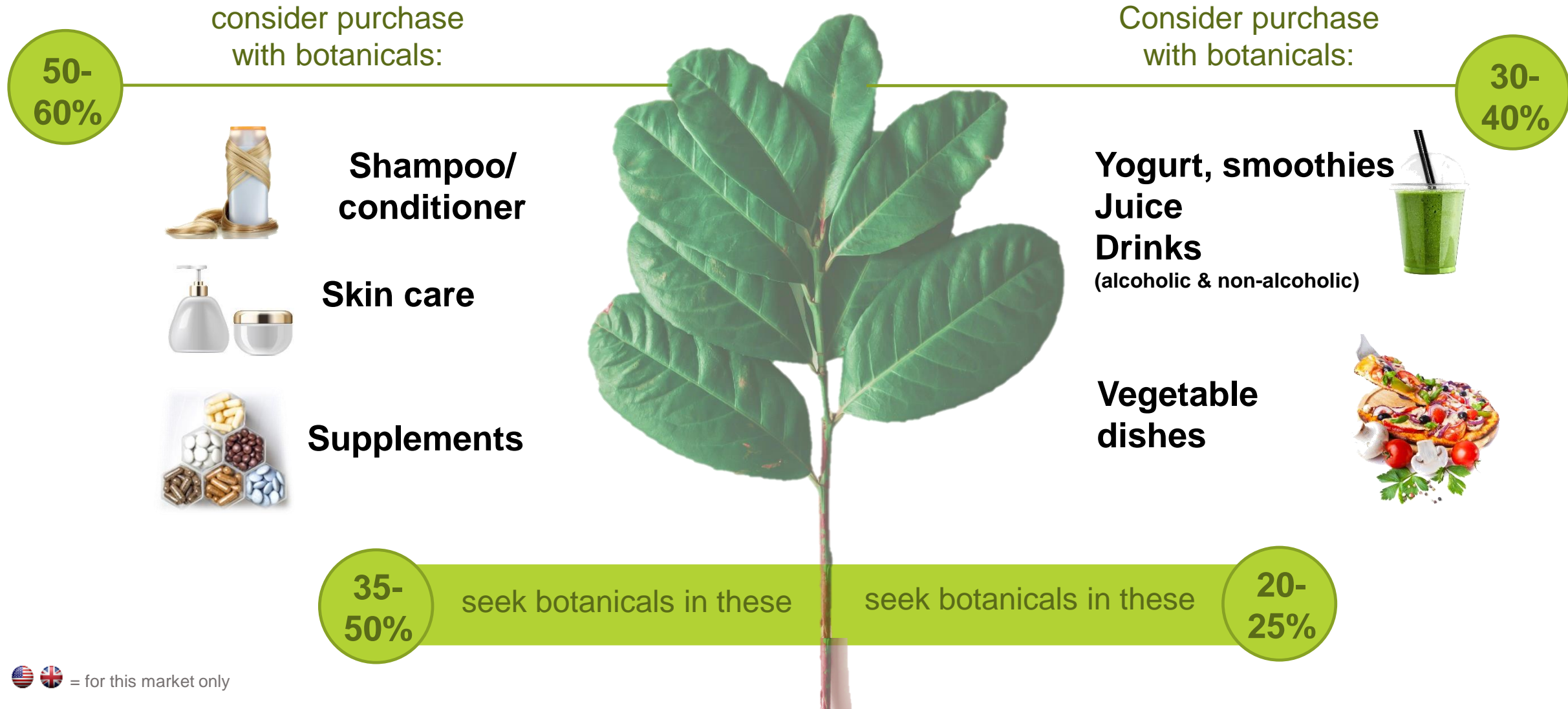
Supplements

Face cream

Cleansers



Stronger interest in botanicals for hair care, skin care & supplements



Active Beauty
Adaptogenes
Botanicals Solution



Face mask
Featuring Moringa and Turmeric

Formula C0004 1. Batch: 10072 1.50 ml / 0.5 fl. oz.
Free sample not for sale

Givaudan

Active Beauty
Adaptogenes
Botanicals Solution



Powder for detoxifying juice
Featuring Moringa Leaf Extract

kg / Use before: 2026-08 / Free sample not for sale
After opening, use within the day

Givaudan

Suggesting new implications & opportunities



Food Beverage Category

Increased focus on health & wellness
Broader audience of Health Seekers
Delivering on taste is must have

Multiple applications for Food/Beverages
Hone-in on key benefits you can deliver

Personal Care Categories

Hygiene, skin improvement & cleanliness still important
ingredients are key factors driving use

Cleaning & Personal Care need to insure efficacy

Comms Strategy

Integration of digital impacting their trusted sources
Evolution of the shopping journey

Identify how to talk to them, key pulse points and personalization opps to build brand loyalty



Articles
of interest

The Future
is Plant-based

Functional
Ingredients

Get in Touch

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Infographics
of interest

Trendy Ingredients

Natural Products in the
age of COVID