



U&A Study of Vitamin Supplements

An example study in
vitamin supplements market for 55+ in USA

PUBLIC



Executive summary

- With a growing ageing population, it is increasingly important to acknowledge health concerns for the elderly. We would like to understand older people's current usage of vitamin supplements to gain a clearer image of their needs as consumers.
- The body's ability to absorb nutrients through food becomes less efficient with age. This means it is harder for older people to consume the necessary amounts of certain vitamins and minerals, making vitamin supplements an ideal solution.
- We surveyed more than 300 respondents over the age of 55 in the USA to understand their usage and attitudes, via a U&A study. All respondents have concerns about personal health, are taking action to improve their health and wellbeing, and are also vitamin supplement users or considerers.
- The results show there is a big market for vitamin supplements; among those **users**, more than $\frac{3}{4}$ are consistent users and half live in a household with additional users, most respondents purchase 1-3 times every three months, spend \$11 - \$25 per purchase, and purchase at pharmacies, online, and at supermarkets. Many are motivated by personal concerns and seek general vitamins and minerals boost, with most taking Multivitamins and Vitamin D tablets.
- Price, ingredients, and ease of use are the biggest influencers on purchasing decisions. Most respondents have a positive **attitude** towards vitamin supplements which are "easy to take" and "easy to store". A limited number of respondents think that vitamin supplements are natural, and few have concerns about side effects.
- Demographic data including background, living and working conditions, dietary restrictions, health conditions, exercises, etc. help to better understand the sample.

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Sample definition and screening questions



Sample definition: Vitamin supplements users or considerers of 55+ y.o. in USA

1. Please enter your age: _____
(TERMINATE IF NOT 55-100 y.o.)
2. On a scale of 1 to 5, how concerned about your health are you?
 - 1: I am not concerned about my health at all (TERMINATE)
 - 2: (TERMINATE)
 - 3: (TERMINATE)
 - 4:
 - 5: I am very concerned about my health
3. Are you taking any actions to improve your health and wellbeing in any sense?
 - Yes
 - No (TERMINATE)
4. What kind of actions are you taking to improve your health and wellbeing?
Please select all that apply
 - I monitor or change my food intake
 - I take nutrition supplements
 - I try to exercise more
 - I am changing my lifestyle
 - Other (please specify)
5. Are you taking any vitamin supplements (multivitamins, vitamin C, etc.)?
 - Yes, I am
 - No, I am not (TERMINATE)
6. Are you considering taking any vitamin supplements (multivitamins, vitamin C, etc.)?
 - Yes, I will definitely consider
 - Yes, I will probably consider
 - ? Not sure
 - No, I will probably not consider
 - No, I will definitely not consider

Country: USA

Sample: People who have concerns on personal health and take actions to improve health and wellbeing, and are vitamin supplements users or considerers.






Gender: Any

Age: 55-100

Sample definition: Vitamin supplements users or considerers of 55+ y.o. in USA

Criteria for respondents

- Located in the USA
- Aged 55-100
- Have concerns on personal health, take actions to improve health and wellbeing, and are vitamin supplements users or considerers.

	Response count	% in sample
All responses	304	100%
 Age		
55-60	80	26%
61-70	149	49%
71-100	75	25%
 Gender		
Male	89	29%
Female	215	71%
 Annual household income		
\$0 - \$14,999	22	7%
\$15,000 - \$24,999	49	16%
\$25,000 - \$49,999	99	33%
\$50,000 - \$79,999	64	21%
\$80,000 or more	58	19%
Prefer not to say	12	4%
 Healthy concerns		
Very concerned about personal health	162	53%
Concerned about personal health	142	47%
Moderately concerned, barely concerned, not concerned*	0	0%
 User or considerers		
Users	293	96%
Considerers	11	4%

Note: * Respondents have moderately concerned, barely concerned, not concerned about personal health are not included in sample N=304. Data collection took place over 26–28 October 2020

Questions about usage

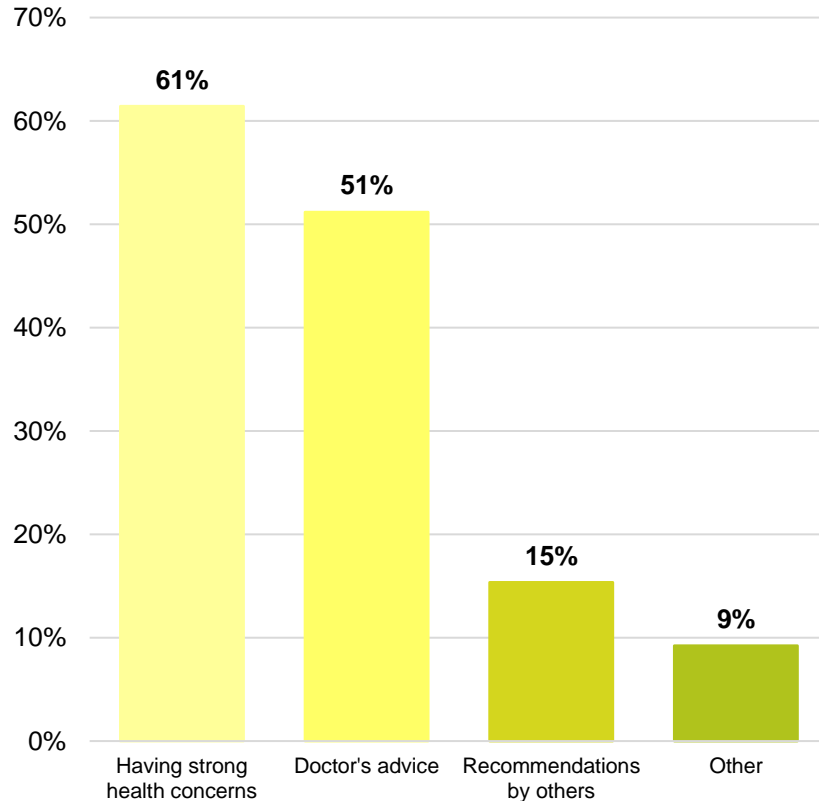


Most consumers are motivated by **personal concerns** and seek **general vitamins and minerals boost**

Usage

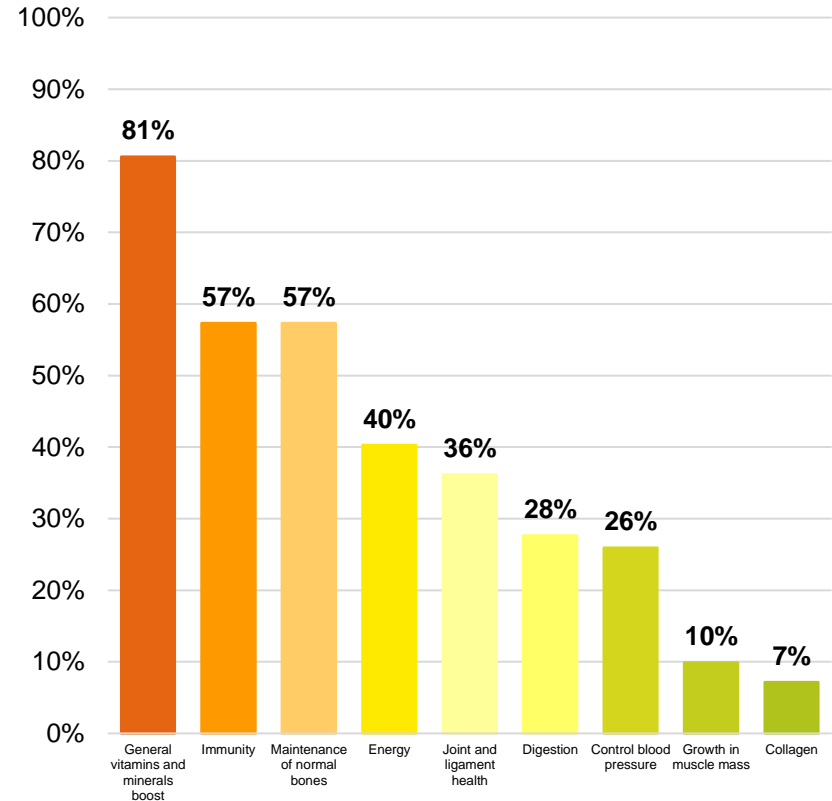
61% of users were motivated to use by personal concern and 50% by doctor's advice

Question: What motivates you to use vitamin supplements?
Please select all that apply.



More than 80% of users seek general vitamins and minerals boost from vitamin supplements

Question: What functions do you seek from vitamin supplements?
Please select all that apply.

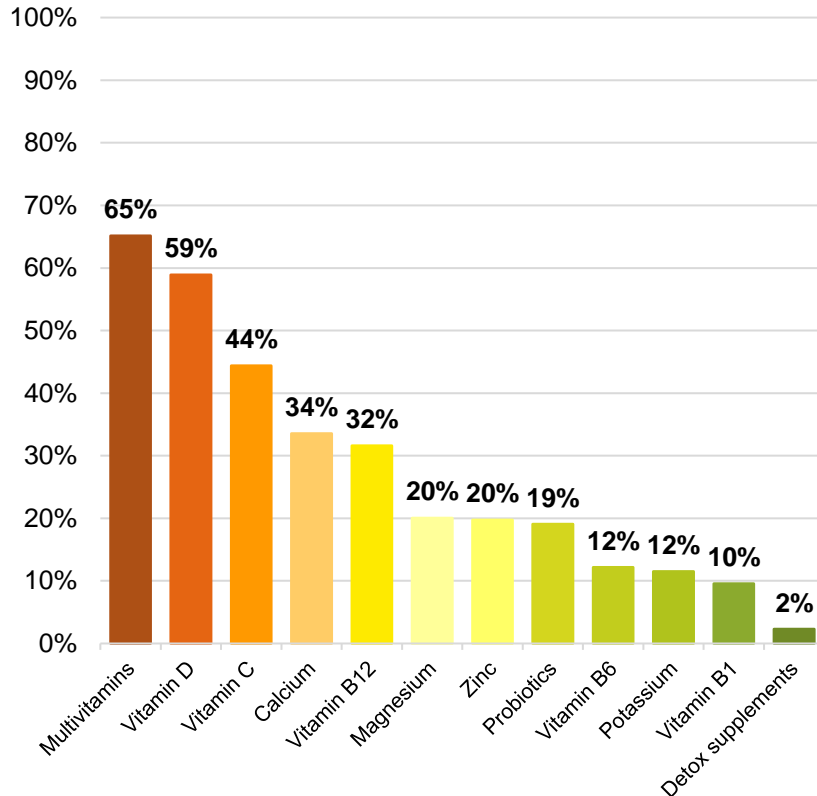


Multivitamins and Vitamin D are the most used vitamins; tablets are the most popular form

Usage

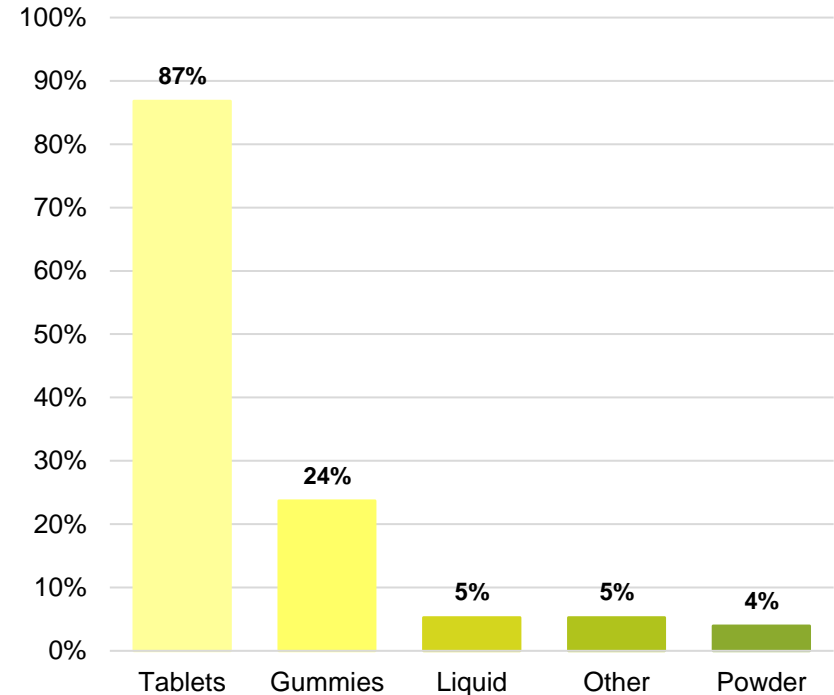
**65% of users are taking multivitamins;
59% are taking Vitamin D**

Question: What vitamin supplements do you currently consume?
Please select all that apply.



**87% of users are taking vitamins in the form of
tablets**

Question: Which types of vitamin supplements do you normally use?
Please select all that apply.

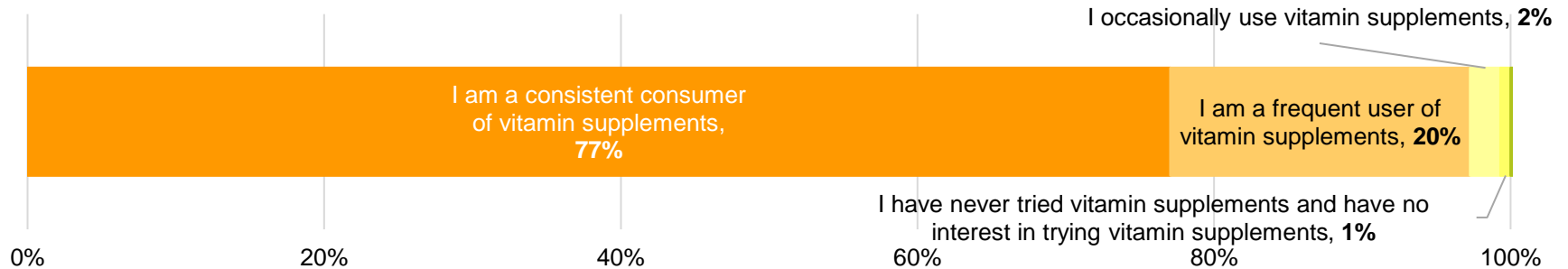


More than $\frac{3}{4}$ of consumers are **consistent users**; almost half are **not the only users** in household

Usage

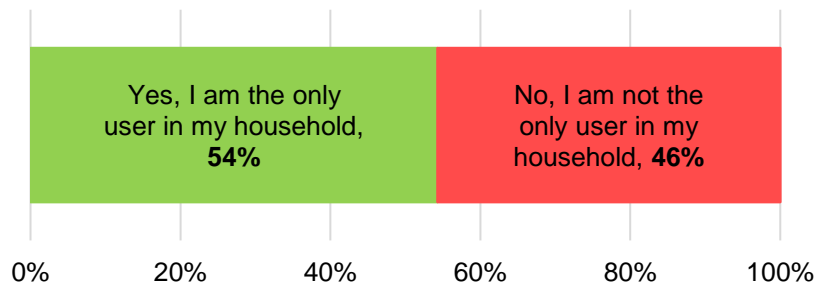
More than 3/4 are consistent users

Question: Which one of the following consumption statements best fits you?



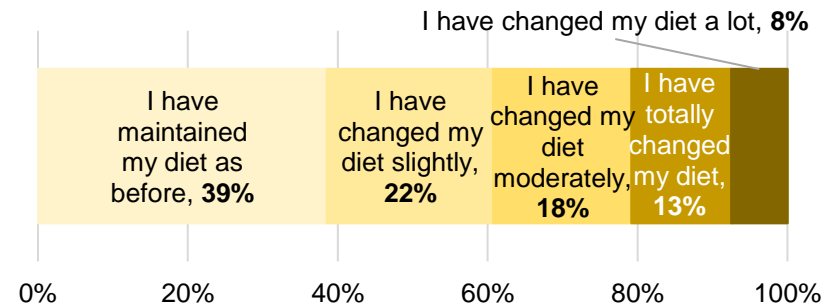
54% are the only users in household

Question: Are you the only one in your household who is using vitamin supplements?



Around 60% of users have changed diet recently

Question: After consuming supplements, did you maintain the same dietary habits?

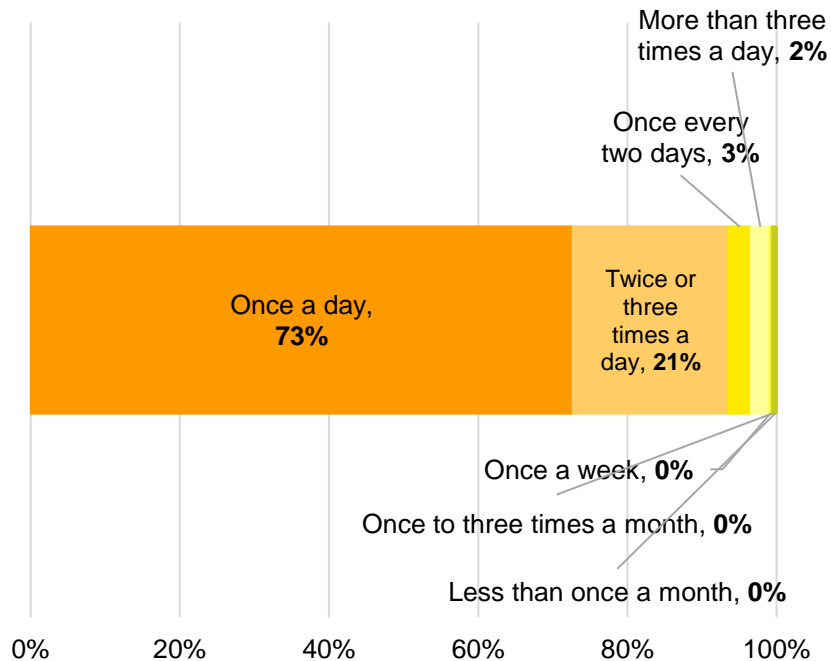


Most respondents take vitamin supplements **once a day** and **before meals**

Usage

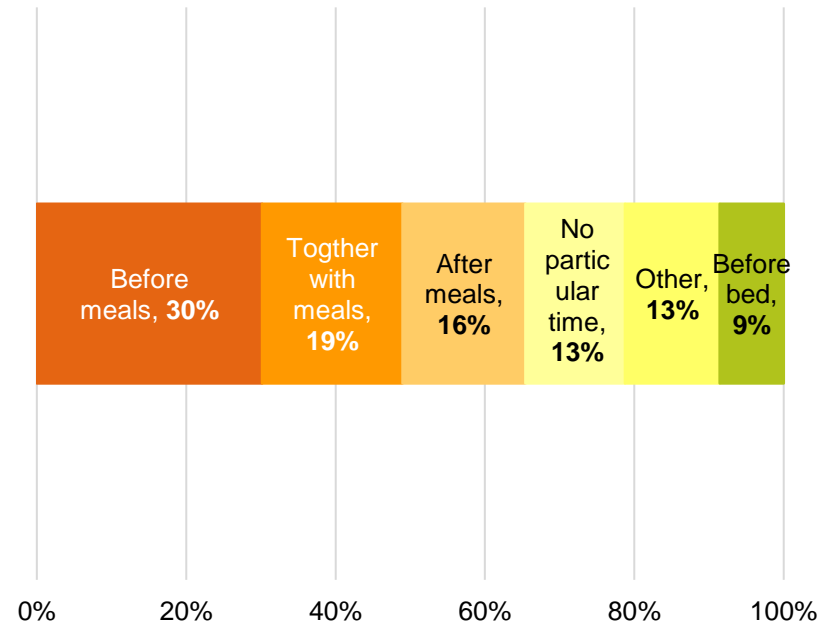
73% of respondents take vitamin supplements **once a day**

Question: How often do you take vitamin supplements?



Most respondents take vitamin supplements **before meals**

Question: When do you normally take vitamin supplements?

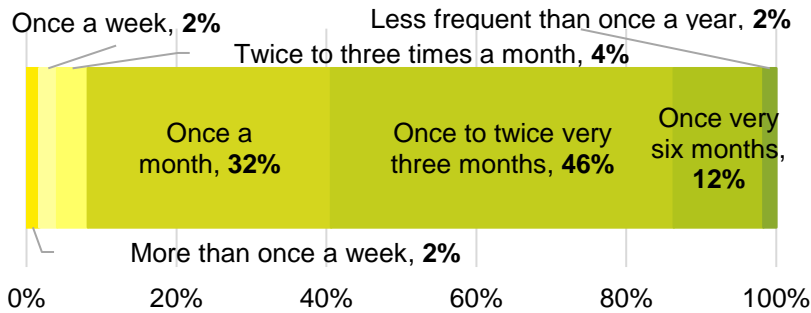


Most respondents purchase 1-3 times quarterly and spend \$11-\$25 per purchase at pharmacies, online, and supermarkets

Usage

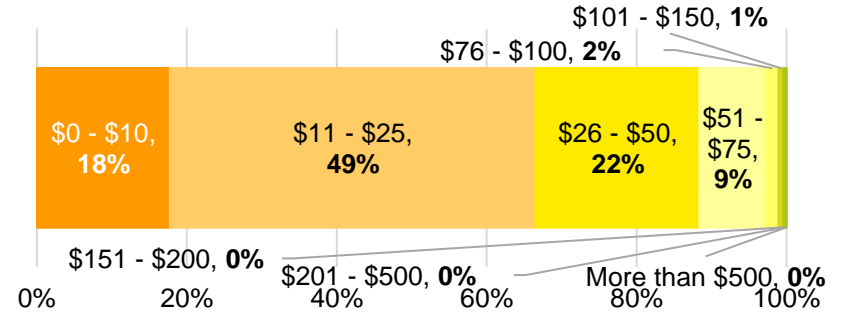
Most purchase once to three times every three months

Question: How often do you purchase vitamin supplements?



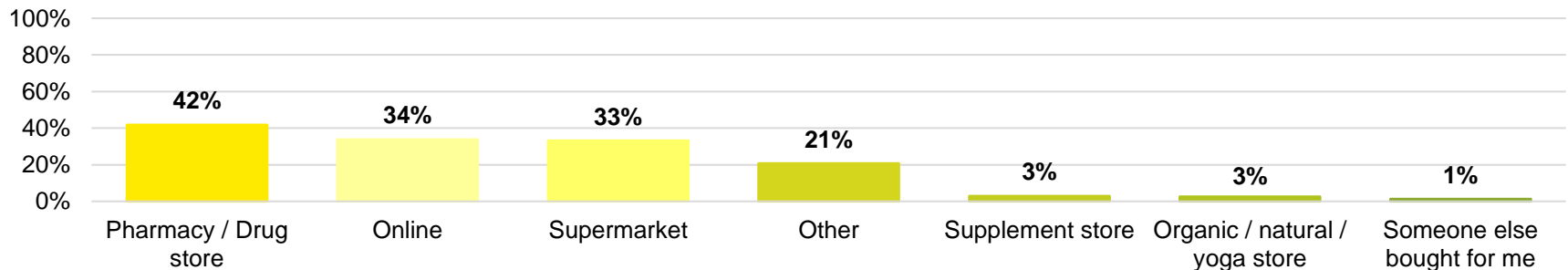
Half spend \$11-\$25 on the last purchase

Question: How much did you spend on your last purchase of vitamin supplements?



Pharmacy, Online and Supermarket are the top three channels

Question: In the past 6 months, where did you purchase the vitamin supplements? Please select all that apply.

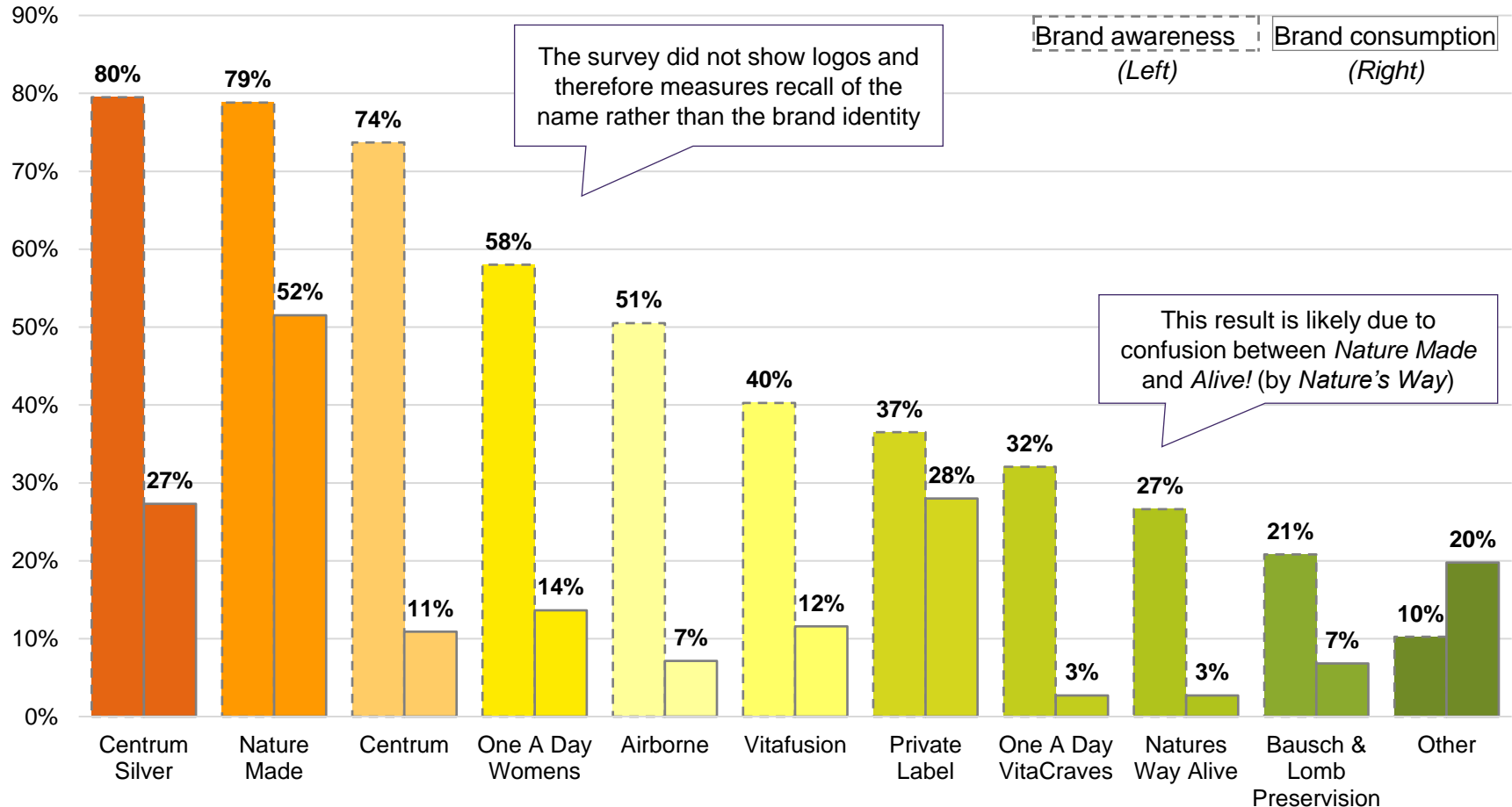


Centrum is the most well-known brand; Nature Made is the most popular

Usage

Question (left): Which of the following brands of vitamin supplements have you aware of? Please select all that apply.

Question (right): Which of the following brands of vitamin supplements have you consumed in the past six months? Please select all that apply.



Questions for considerers



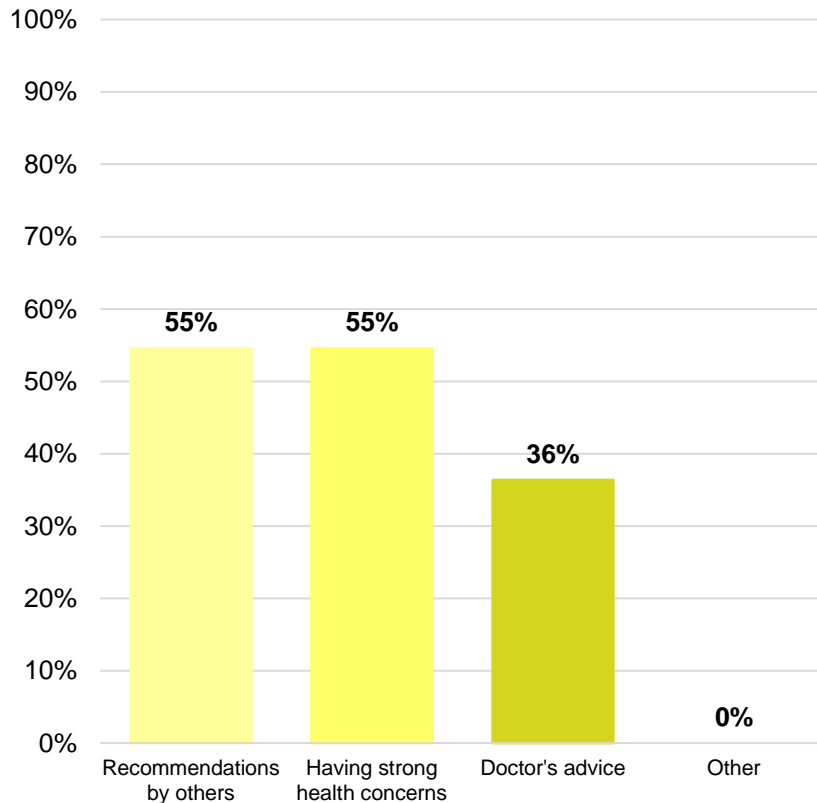
Most considerers were motivated by personal concerns and recommendation, and seek **maintenance of normal bones**

Considerers

Note: Incomplete sample for considerers (11 responses)

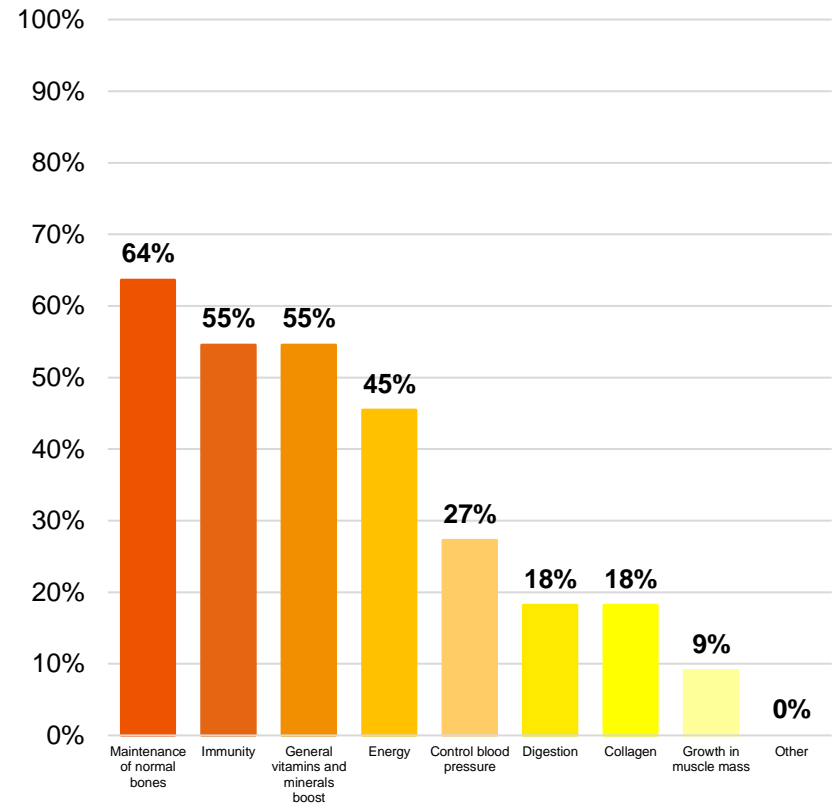
Most were considering using due to recommendations and personal concerns

Question: What motivates you to consider using vitamin supplements?
Please select all that apply.



Most considerers seek maintenance of normal bones from vitamin supplements

Question: What functions do you seek from vitamin supplements?
Please select all that apply.



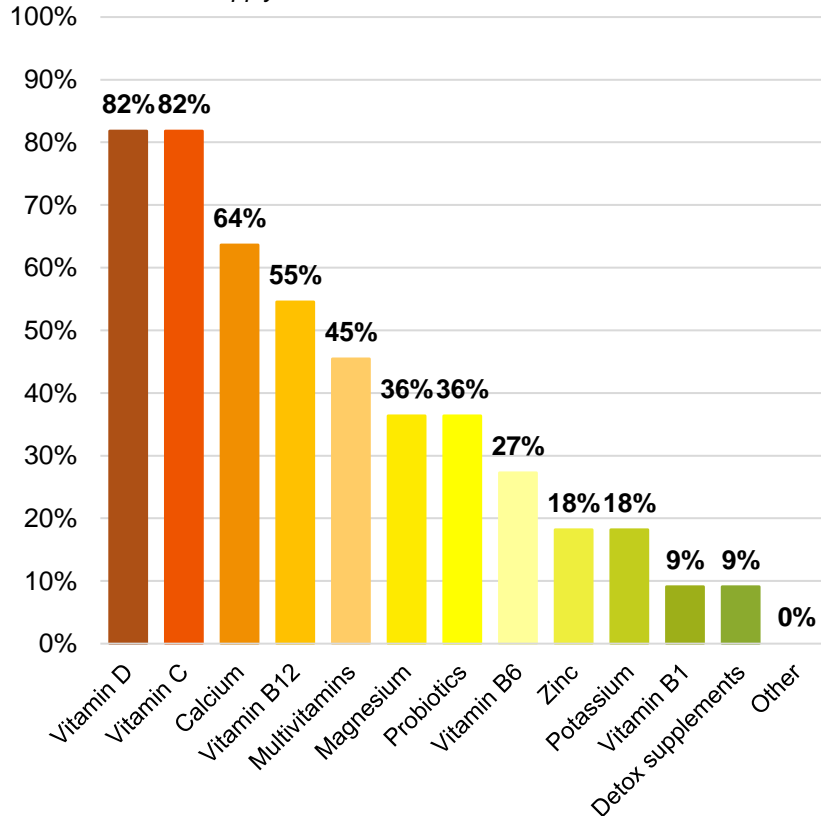
Multivitamins and Vitamin D are the most likely purchases; Tablets would be the most popular form

Considerers

Note: Incomplete sample for considerers (11 responses)

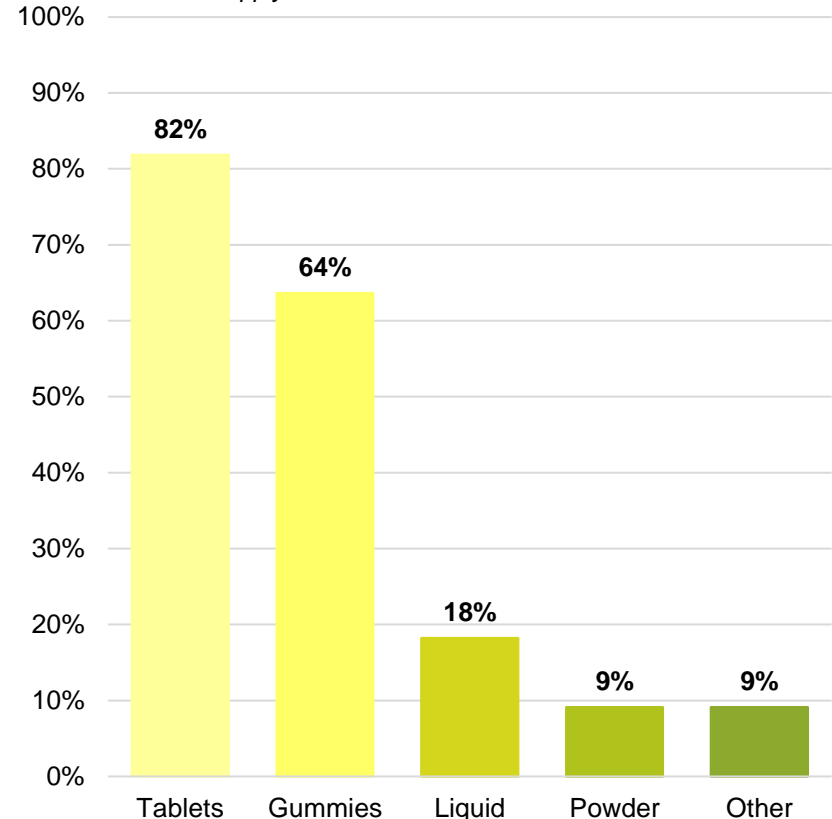
Most respondents would consider using Vitamin C or Vitamin D

Question: What vitamin supplements would you consider using?
Please select all that apply.



82% would consider buying tablets

Question: Which types of vitamin supplements would you consider buying?
Please select all that apply.



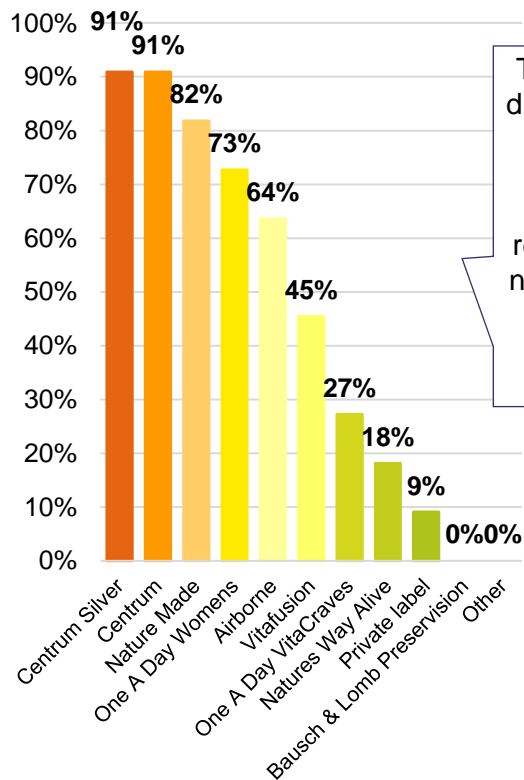
Centrum is the most recognised and considered brand; most would buy from pharmacy

Considerers

Note: Not enough sample for considerers (11 responses)

Most are aware of Centrum

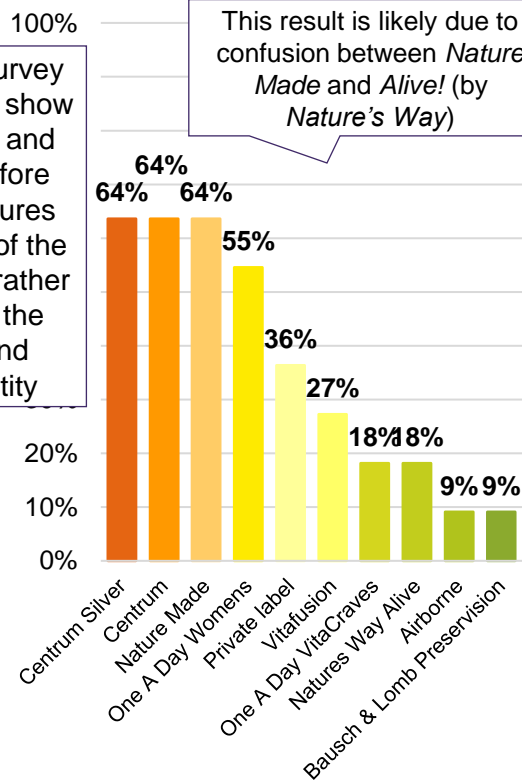
Question: Which of the following brands of vitamin supplements have you aware of?
Please select all that apply.



The survey did not show logos and therefore measures recall of the name rather than the brand identity

Most consider Centrum

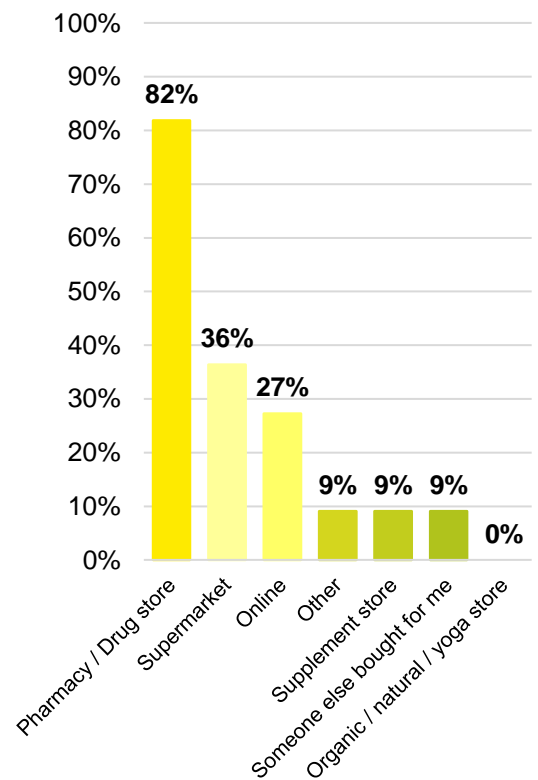
Question: Which of the following brands of vitamin supplements would you consider buying?
Please select all that apply.



This result is likely due to confusion between Nature Made and Alive! (by Nature's Way)

80% consider buying at pharmacy or drug store

Question: Where would you consider buying vitamin supplements?
Please select all that apply.



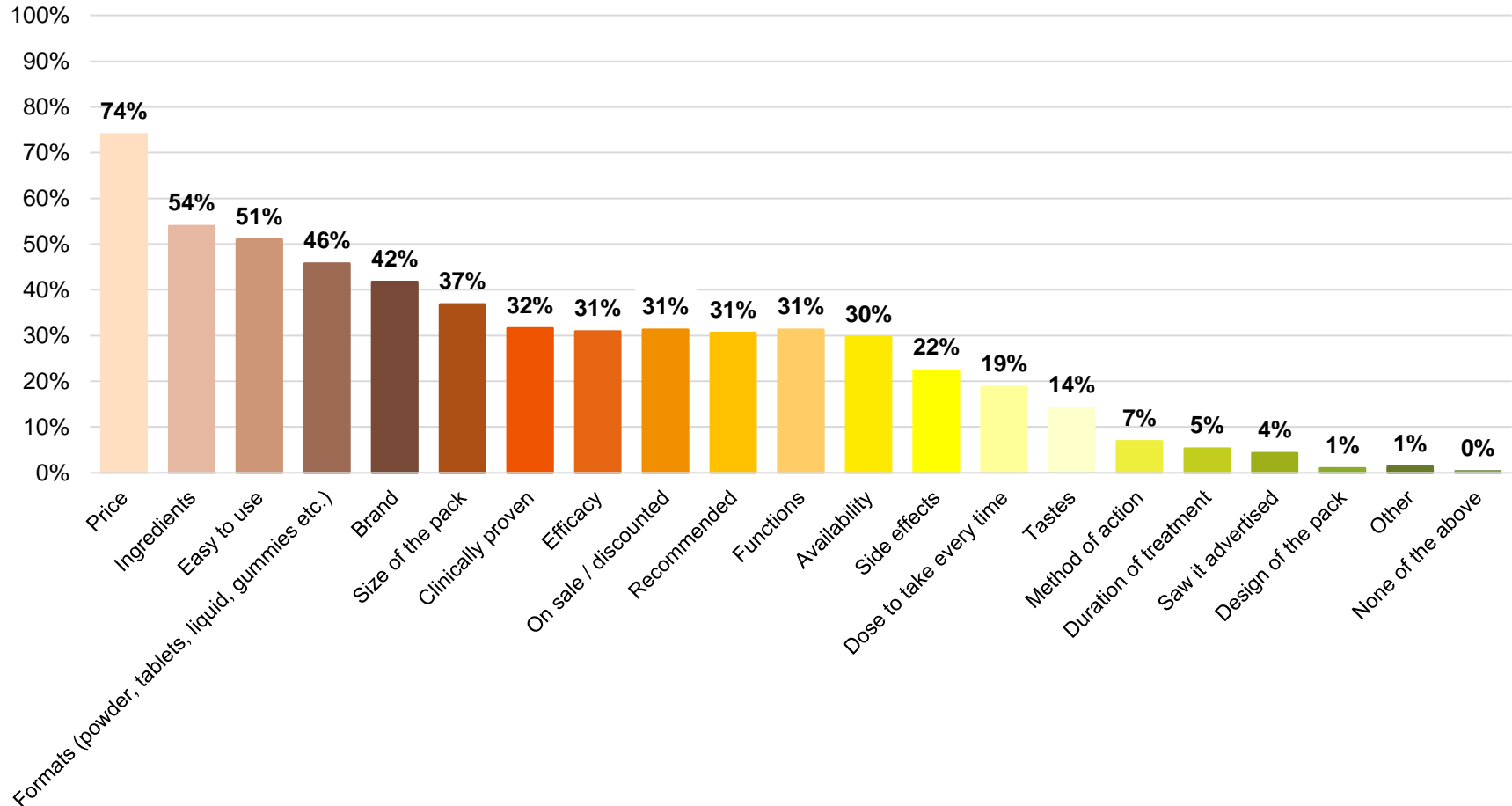
Questions about attitudes



Price, ingredients, and ease of use influence purchasing decisions the most

Attitudes

Question: Please choose all of the attributes that influence your purchasing decisions when buying vitamin supplements.
Please select all that apply.



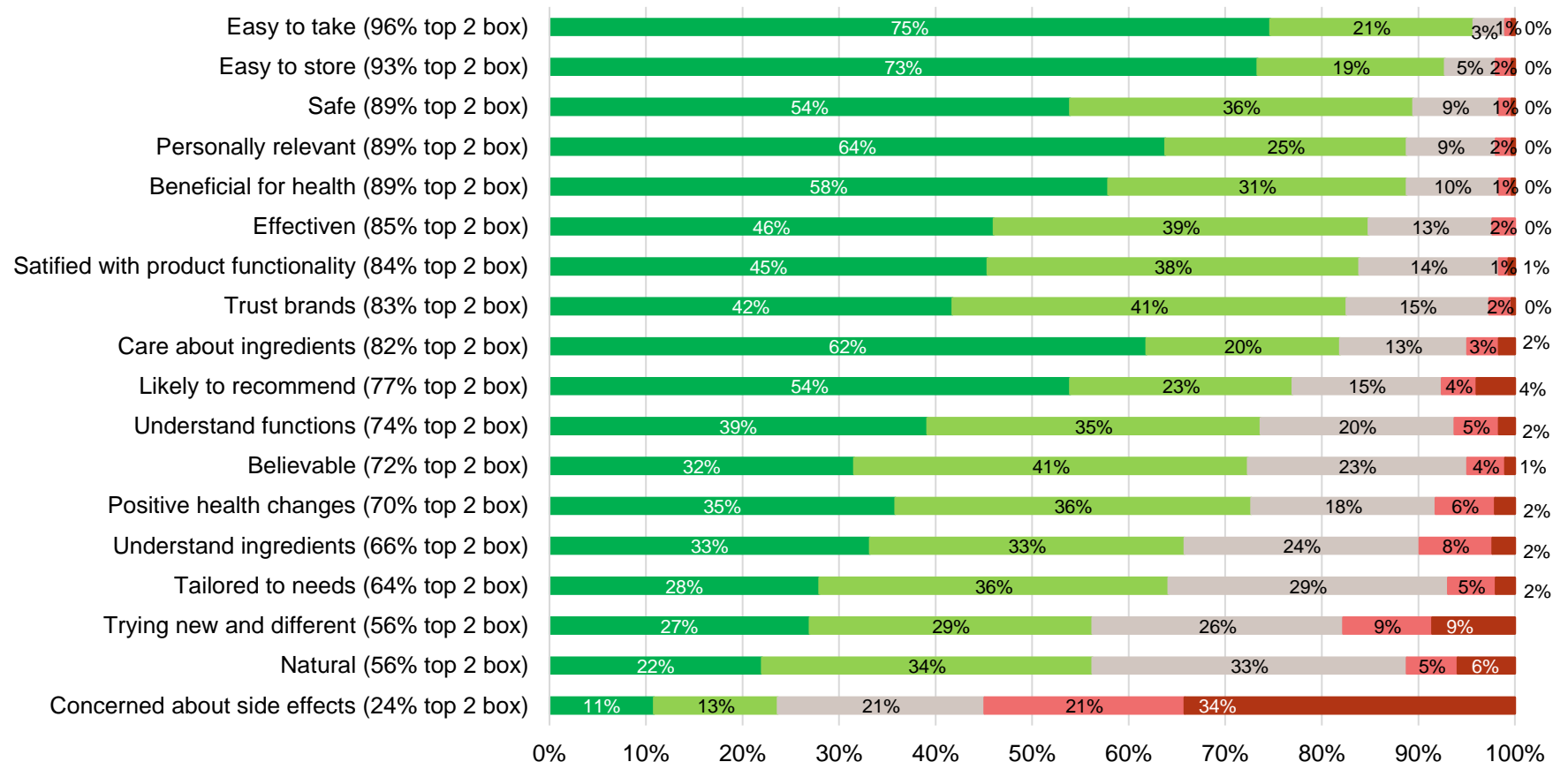
Attitudes (Top 2 box metrics):

Most think vitamins are **easy to take** and **store**;

Few are concerned about side effects

Attitudes

Likert-scale questions, such as: On a scale of 1 to 5, how easy to take do you feel that the vitamin supplements are?



"Top 2 box" refers to the percentage of respondents who answer "Somewhat agree" or "Completely agree".
Output is based on vitamin supplements users and considerers (N = 304).

Demographic data

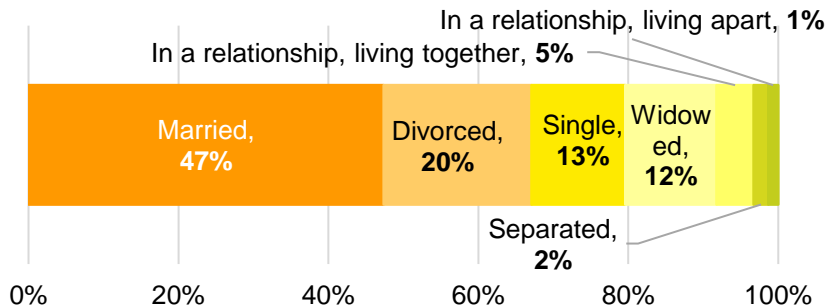


About half of respondents are **married**, living with a **partner**; most are Catholic/Christian and Caucasian

Demographics

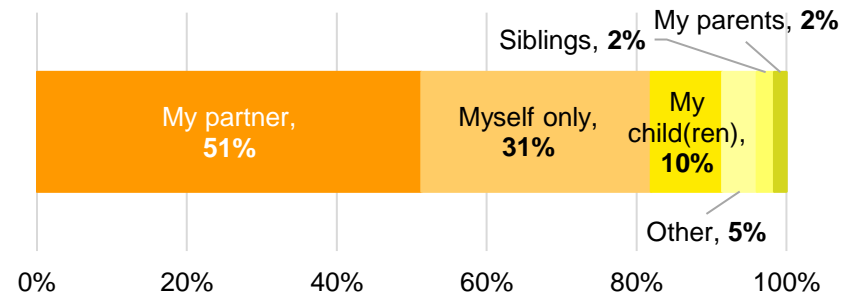
Most respondents (47%) are married

Question: Which of the following best describes your relationship status?



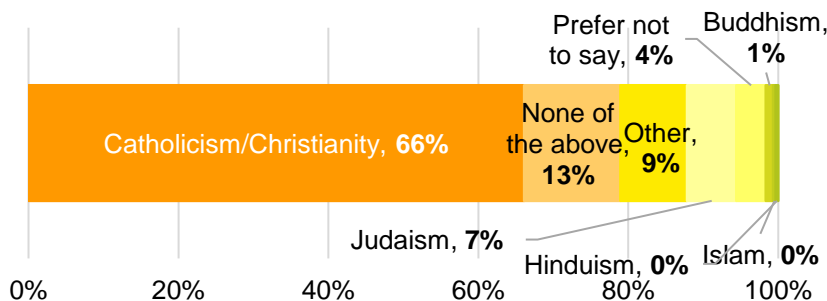
Most respondents (51%) are living with partner

Question: Who do you live together with?



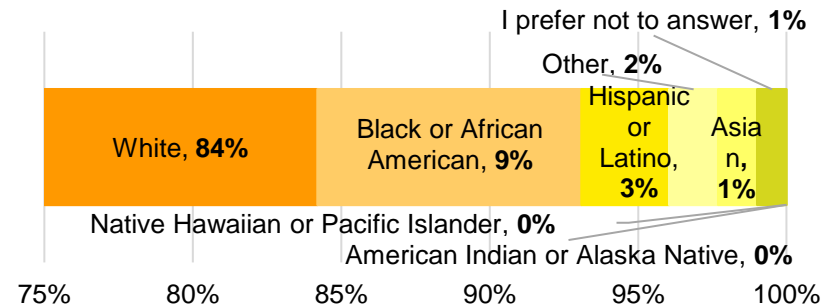
Most respondents (66%) are Catholicism/Christianity

Question: If applicable, please specify your religion?



Most respondents (84%) are Caucasian

Question: What is your ethnicity?

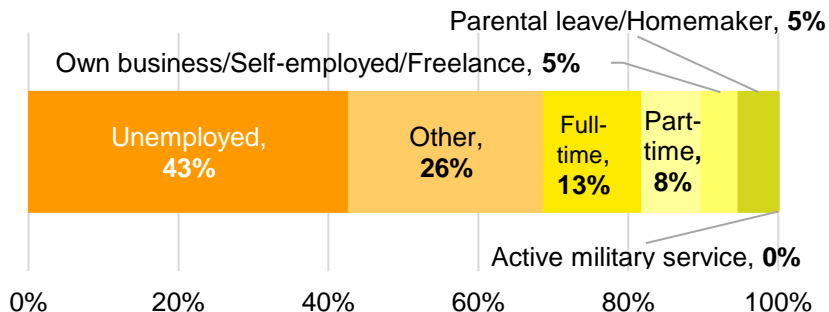


Working status for respondents

Demographics

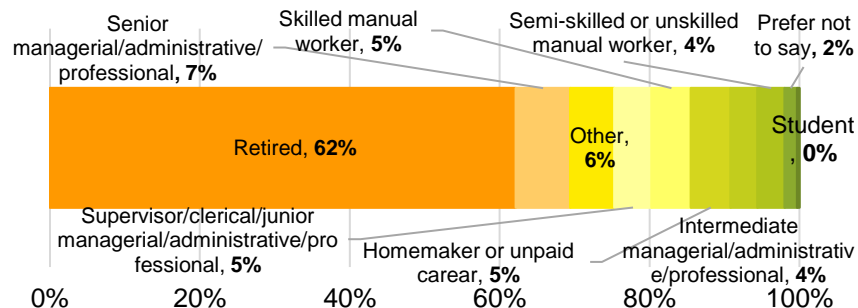
43% of respondents are not working

Question: Which of the following statements best describes your employment status?



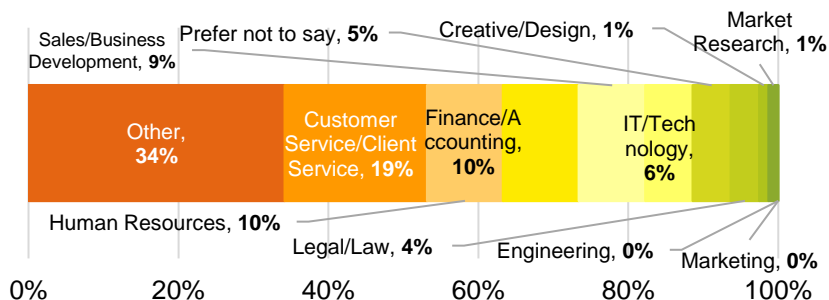
Retirement is the most common occupation

Question: Which of the following statements best describes the job type of the earner in your household?



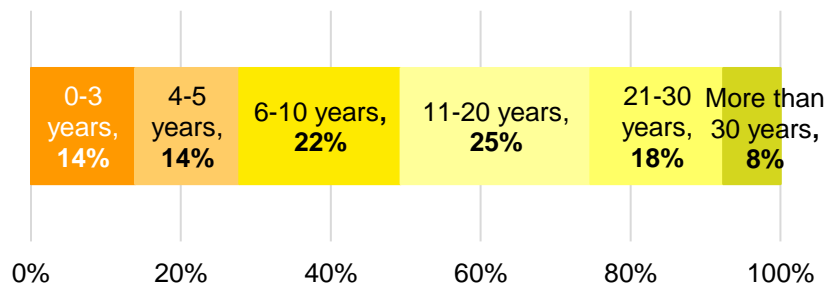
20% work in customer service/client service department

Question: Which department do you primarily work within at your organisation?



1/4 of respondents have been in current position for 11-20 years

Question: Approximately how long have you been in your current position (in years)?

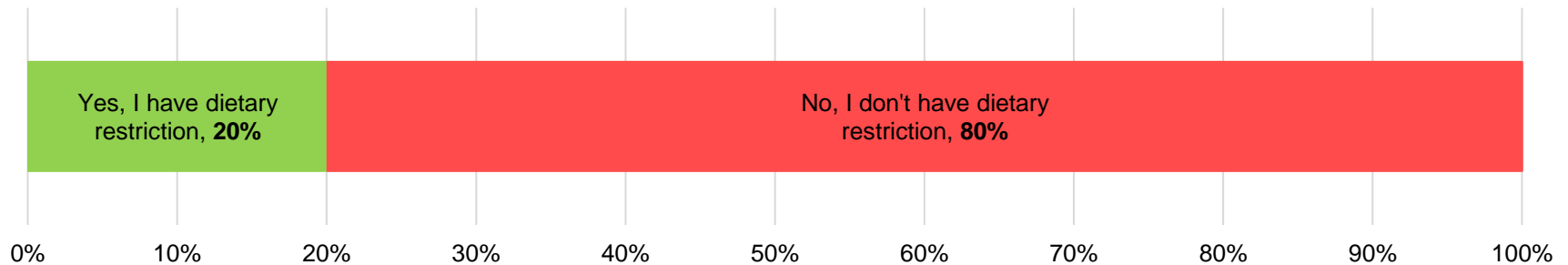


80% respondents don't have dietary restrictions; of those who do, most are diabetic

Demographics

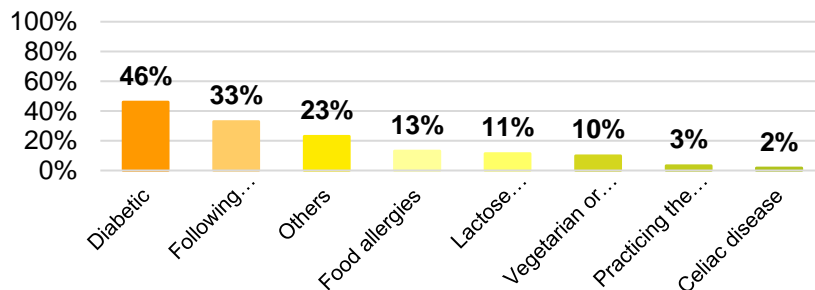
80% of respondents don't have dietary restrictions

Question: Do you currently have any kind of dietary restriction?



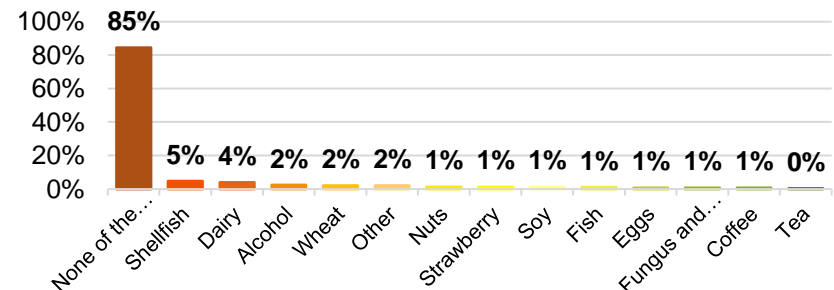
Almost half have dietary restrictions due to diabetes

Question: You mentioned that you currently have a dietary restriction. Please specify the reasons for being on a restricted diet. Please select all that apply.



Most intolerances or allergies are to shellfish and dairy

Question: Do you have any of the following food intolerances or allergies? Please select all that apply.

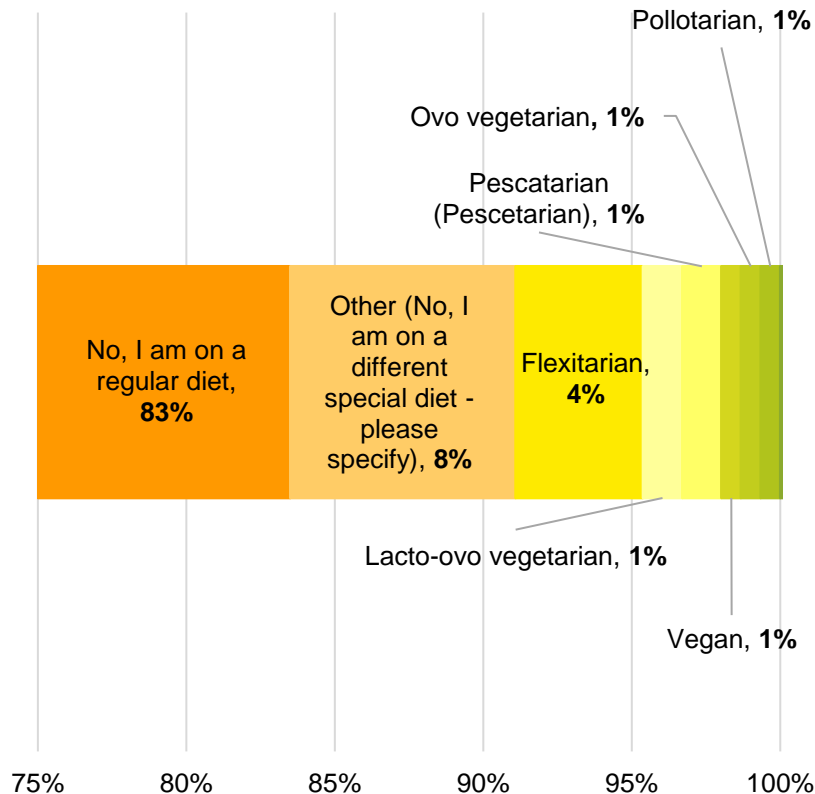


A minority of respondents have a plant-based diet; oats and soy are their most preferred products

Demographics

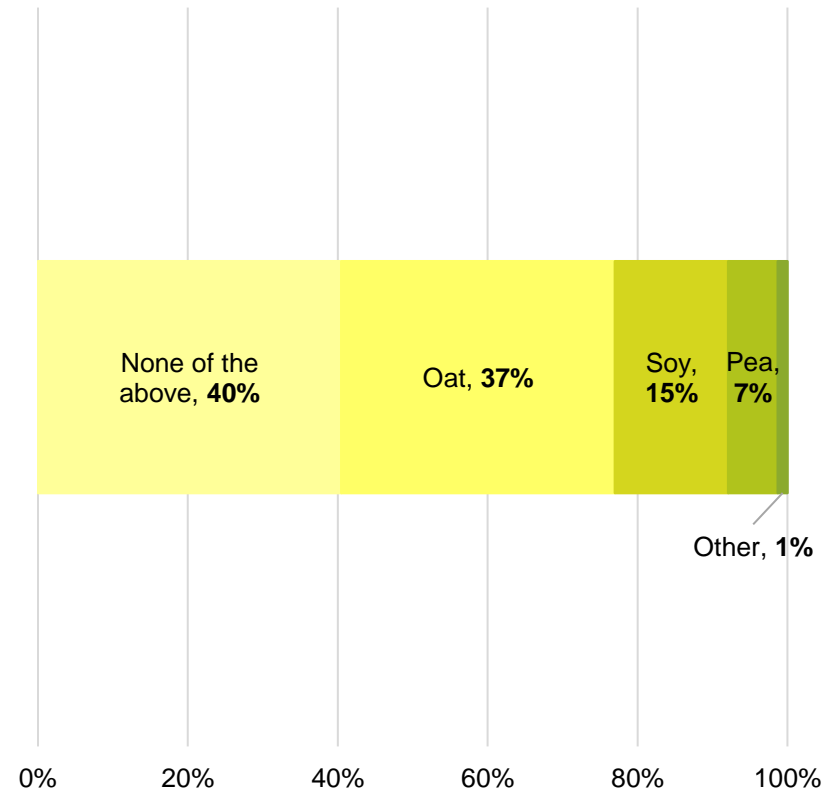
9% respondent follow one of the different vegetarian/vegan diet

Question: Are you following a vegetarian/vegan diet?



More than 1/3 people prefer oat as a ingredient of plant-based products

Question: Which of the following ingredients of a plant-based product do you prefer the most?

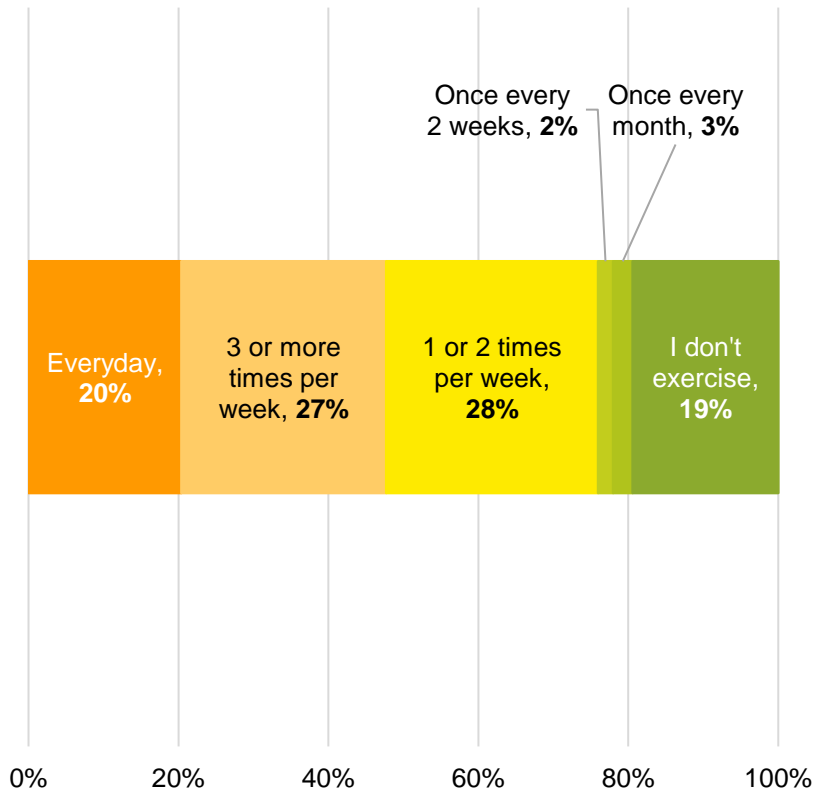


3/4 of respondents exercise more than once a week; around half did a an outdoor activity recently

Demographics

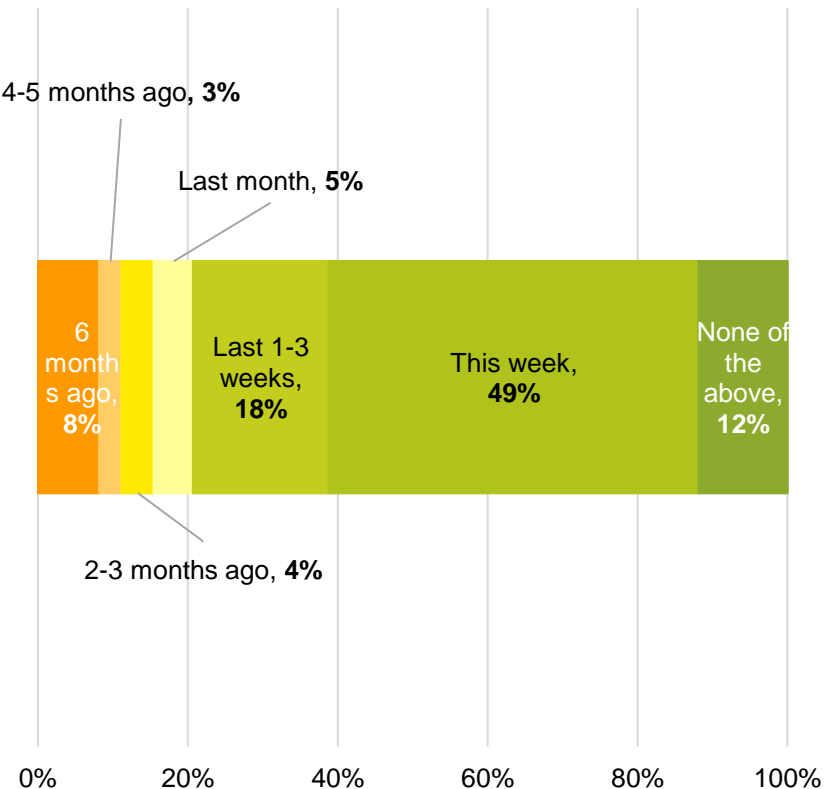
More than 3/4 of respondents do physical activity/exercise more than once a week

Question: How often do you engage in physical activity/ exercise?



Around half of respondents did an outdoor activity within the past week

Question: When was the last time you engaged in an outdoor activity?

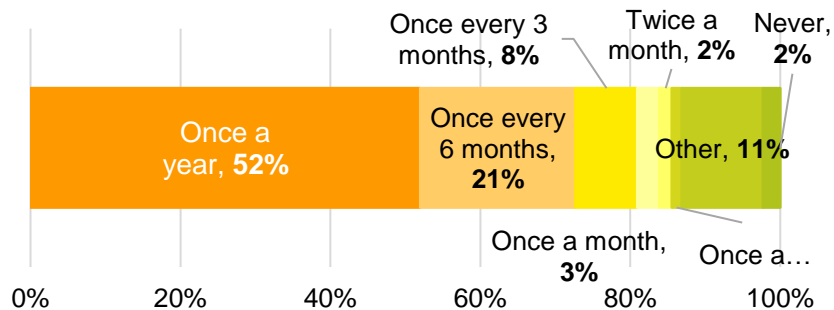


More than 80% of respondents are suffering different degrees of health problems

Demographics

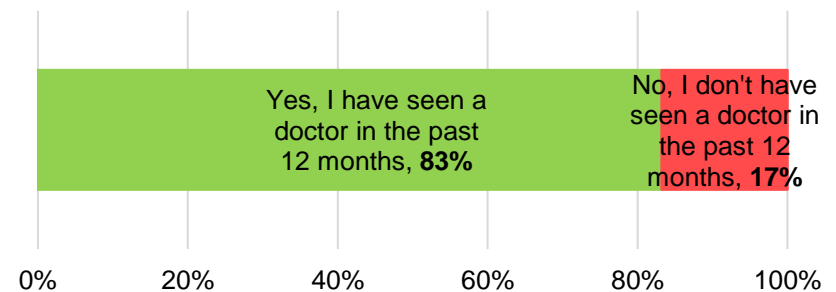
35% of respondents fall sick more than once every 6 months

Question: How often do you fall sick?



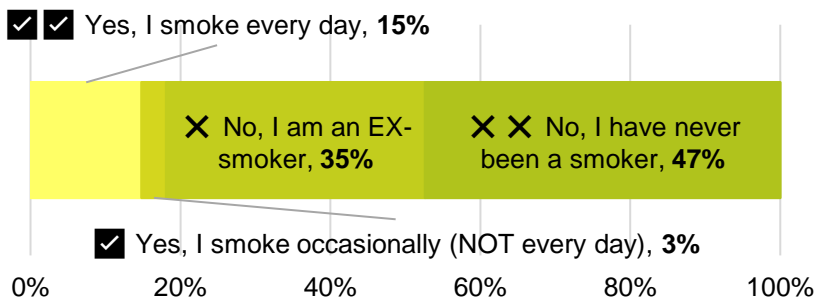
83% have seen a doctor for health problems/issues in the past 12 months

Question: Have you seen a doctor for health problems/issues in the past 12 months?



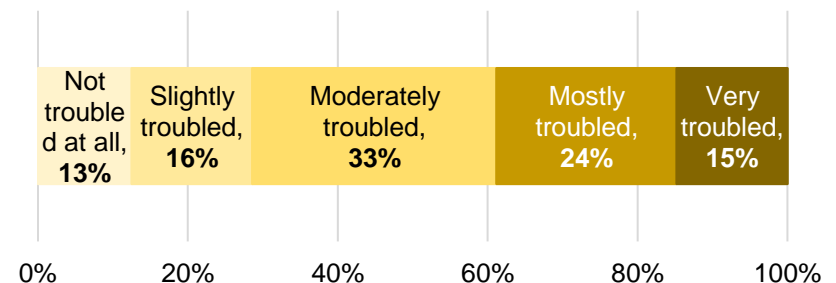
18% respondents currently smoke

Question: Do you currently smoke?



88% are troubled by health problems/issues

Question: On a scale of 1 to 5, how troubled are you by health problems/issues?

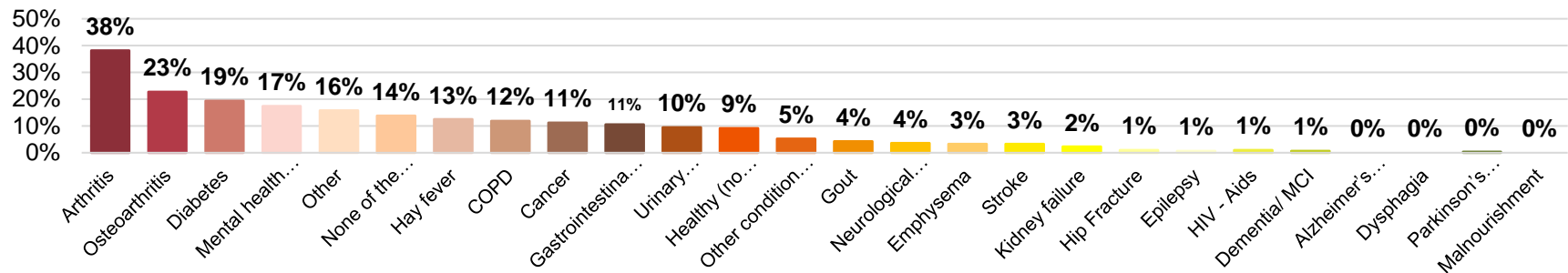


Arthritis and osteoarthritis are most prevalent conditions; 92% of respondents make the vitamin purchasing decisions

Demographics

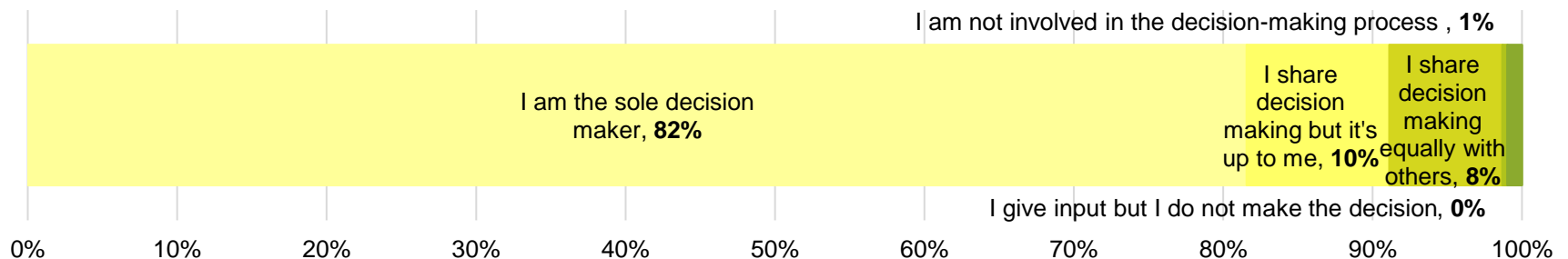
38% have been diagnosed with Arthritis and 23% with Osteoarthritis

Question: Which, if any, of the following conditions have you been diagnosed with? Please select all that apply.



92% are main decision makers regarding the purchase of vitamin supplements

Question: Which of these statements describes your involvement in making decisions regarding the purchase of vitamin supplements in your household/for personal usage?



Within the sample, more than 70% are taking supplements to improve health and wellbeing

Demographics

Question: What kind of actions are you taking to improve your health and wellbeing? Please select all that apply.

