Food supplements consumer research

Area of research interest: Behaviour and perception
Study duration: 2017-12-22
Planned completion: 25 May 2018
Conducted by: Community Research and 2CV

Background

While there is considerable market data available, in depth understanding of consumer use of and attitudes towards food supplements is limited.

The growth in the consumption of food supplements in recent years, especially in the sports nutrition, probiotic and herbal or traditional categories, coupled with changes in the ways in which people purchase and consume them, has made a need for fresh consumer insight ever more pressing.

Historically the type of businesses that sell supplements would have been health shops, chemists, supermarkets or direct selling. In the last few years the variety of outlets that sell supplements has increased, with supplements now sold in gyms, leisure centres, beauty salons, small retail shops and sports shops. These business operators may not understand that the products they are selling are defined as 'food', and consequently are unaware of the legislative requirements for food supplements. Many may not consider themselves as food businesses in the traditional sense, and therefore are unlikely to be registered with or known by local authorities.

In addition to the growth of non-traditional fixed retail premises, there has also been a significant rise in online retailers. This includes both online market places of major retailers or brands, and niche independent online retailers who may both have their own sites or sell through third parties.

This research will inform the development of our work on food supplements over the next few years including identifying any emerging risks.

Research approach

The research consisted of two phases:

- a scoping phase, which provided a level of base knowledge around food supplement consumption with which to inform the second phase
- exploratory phase - an extensive piece of qualitative insight

Phase one

The overall purpose of phase one was to inform the design of design and sample of phase two, as well as to provide some core insight around food supplement consumption. This included desk research, an omnibus survey (to understand demographics and usage habits), and social discourse analysis to better understand how consumers of supplements are using and talking about these products online.

Phase two

Phase two of this project was the main focus of this piece of work and consisted of qualitative research with consumers, most of whom were currently taking food supplements. Participants were asked to complete an online activity using a mobile app in the days leading up to the discussion group or depth interview. Participants uploaded videos and pictures and text in response to questions about their supplement usage, purchase and storage habits. This provided researchers with a fuller picture of individual usage than would have been possible in the discussion groups alone, as well as helping to bring to life consumer behaviour.

Eight 90-minute discussion groups were conducted with ‘mainstream’ consumers, all of whom were taking supplements on a regular basis. Sixteen depth interviews and one mini group were conducted with more vulnerable and niche consumers of food supplements. These were a mix of face-to-face and telephone discussions with consumers from London, Swansea, Derry/Londonderry and Manchester.

Results

Mainstream supplement consumption

Consumers differentiate between food supplements for day-to-day health, and those for specific purposes (e.g. sports nutrition, weight loss) in terms of how they use them and how efficient they perceive them to be.

Drivers for food supplement consumption are both rational and emotional:

- most people say that they take day-to-day supplements (e.g. mainstream vitamins and oils) to maintain or improve their overall health and give them a ‘boost’, or to replace lost nutrients due to diet, age or a health condition
- by taking supplements, consumers feel that they are taking control over their health and bodies by doing something proactive e.g. to combat the decline due to age.

Many consumers acknowledge that they take supplements as a force of habit and that they do not know if they are actually making any difference – but that because such products were viewed as being fairly benign, it was better to be safe than sorry.

While there is some cynicism about their efficacy, consumers do not generally perceive there to be any risks associated with food supplements, except for some niche products. They tend not to think about how different food supplements interact with one another or with prescribed medication. They are largely seen as harmless.

Most consumers are buying food supplements from mainstream retailers, and would avoid buying from unknown online retailers due to fears about provenance and adulteration.

Recommendations (from healthcare or fitness professionals and / or friends and family) and reviews are the key drivers when it comes to decision making around food supplement products and brands.

Younger consumers in particular point to social media as having an influence on their choices. Older people are more likely to get information from traditional media.

Consumers assume that the market is regulated, and have few concerns about the safety of food supplements as long as they continue to buy from reputable retailers and take supplements responsibly.

Niche supplement consumption

As the determination to achieve results (e.g. lose weight, relieve pain) increases, consumers' willingness to experiment can also go up, and for some, the benefits outweigh the risks. However, most feel that these are 'managed' risks – that they know what they are doing and are making informed decisions.

Communities focused on specific issues discuss supplements and share recommendations to a greater degree than most mainstream consumers.

As more niche products are likely to be less widely available, many are pushed to purchase online. It can then be easy to move to the more extreme end of the market.

Research report
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