



THE VOICE OF THE NATURAL HEALTH
INDUSTRY FOR OVER FIFTY YEARS

Introducing the 6th

health of the nation survey 2019

This research was independently conducted by **3Gem**
on behalf of the **Health Food Manufacturers' Association**
with 10,000 UK adults from **16th – 28th October 2019**

Introduction from the Executive Director, Graham Keen

The findings from this latest survey confirm what we have always known – that it is a fallacy to believe that people consider they are fundamentally healthy, or that they can maintain good health simply through their diet alone.

This survey tells us that the number of people who think they are ‘very’ or ‘quite’ healthy has reduced by a third in the last 2-3 years. This is borne out by the fact that, for every £10 of weekly household expenditure, only around 15p of this is spent on maintaining good health.

It also reaffirms that the UK natural products industry remains a national success story, helping millions of people to lead healthier lives. And this looks set to continue as we see that record numbers are now taking food supplements, 2 in 3 adults expect to increase their consumption of food supplements as they get older, and more than half of parents now give food supplements to their children.

The Government has rightly put prevention at the heart of its public health strategy as evidenced by the recent Green Paper ‘Advancing our health: prevention in the 2020s’. However, this paper has critically underplayed the vital role of supplementation in this regard, given the shortfall in micronutrient intake that the Government’s own National Diet & Nutrition Survey reveals.”

Graham Keen

Executive Director

The survey was conducted with 10,000 UK adults, and was nationally representative of age, gender and regional breakdown.

GENDER

Male	48.6%	4863
Female	51.0%	5101
Other	0.2%	22

AGE

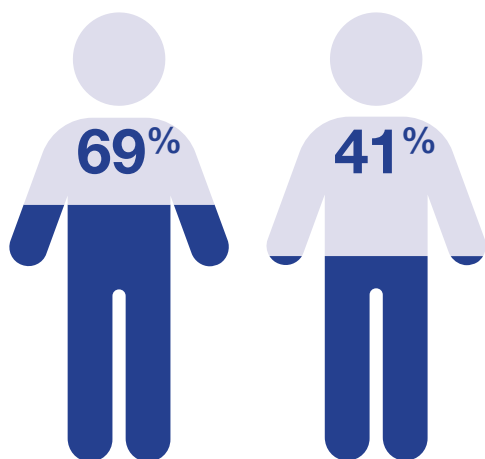
Prefer not to say	0.1%	14
Total	100.0%	10000
18-24	15.1%	1511
25-34	24.1%	2409
35-44	23.4%	2341
45-49	8.5%	854
50-64	18.9%	1894
65+	9.9%	991



“For every £10 of weekly household expenditure, only around 15p of this is spent on maintaining good health”

These numbers tell a great story for our industry:

69% of the adult population (**59%** in 2016) are now taking food supplements, **41%** of these on a daily basis



This equates to over **16.5 million people** now taking food supplements **on a daily basis**. Compared to **15.2 million** in the last Health of the Nation Survey (2016). This is a rise of 8.6%.

55.5%

of adults have started taking food supplements since the last survey in 2016

25.7%

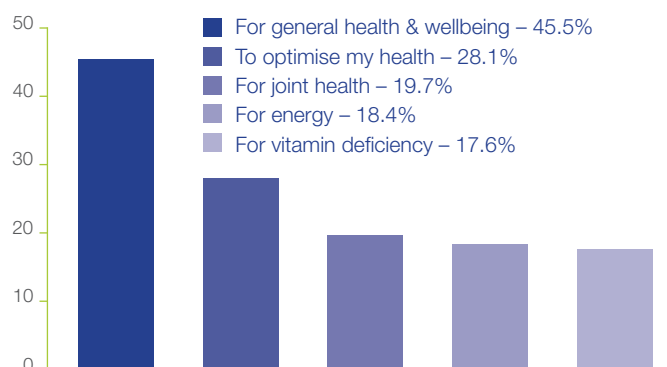
have started in the last year



The most popular option remains a

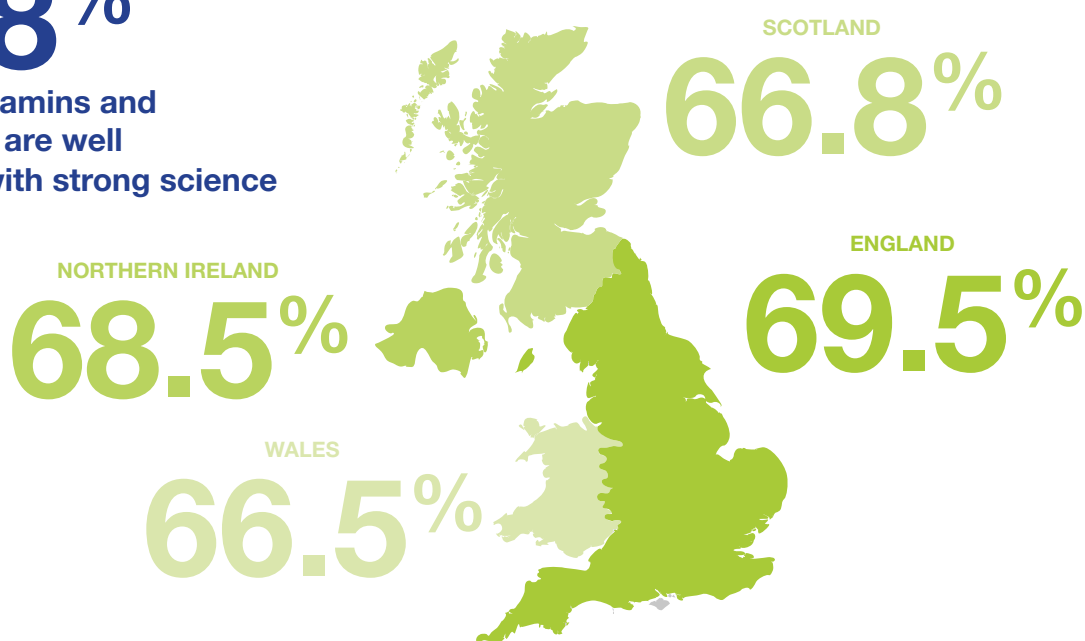
multivitamin

What are people taking food supplements for?



73.8%

agree that vitamins and supplements are well researched with strong science

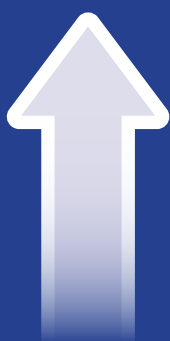


On a national basis, **England has the highest consumption of food supplements (69.5%)**, followed by Northern Ireland (68.5%), Scotland (66.8%) and Wales (66.5%)

What price do we put on the nation's health?



The average spend per week on 'keeping healthy' is still only
£8.82



but this is up from
£7.62 in 2016,
perhaps reflecting the
increasing role of food
supplements.



Nationally, this spend is highest in **England (£8.96)**, followed by **Northern Ireland (£8.71)**, **Scotland (£8.34)** and **Wales (£7.37)**



The research also
reveals **men are
paying more** for
their wellbeing,
with their average
weekly spend being
£9.18

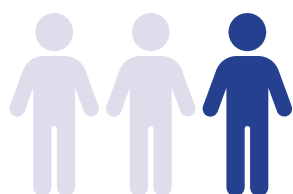


compared to
£8.46
for women

What trends are defining our industry?

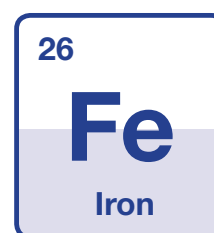
We've seen the emergence of some clear trends over the last three years, with some positive moves for the industry, and some worrying knowledge gaps.

Knowledge of public health recommendations



Public Health
England

Almost one third (30.7%) of Brits surveyed still aren't aware of Public Health England (PHE) recommendations, that all adults and children should consider taking a Vitamin D supplement through the autumn and winter



49%

Almost half (49%) don't know that a lack of iron can lead to anaemia – despite the rising numbers of vegetarians and vegans across the country

Younger adults spending more on their health



UK

45.3%



WALES

33.6%

Almost half (45.3%) of over 65s, and over a third of those surveyed in Wales (**33.6%**) said that they **spend nothing on keeping healthy** on a weekly basis

Fewer adults having confidence in their health



66.8%



44.6%

Less than half of those surveyed (**44.6%**) categorised their state of health as 'Very' or 'Quite' healthy, compared to more than two-thirds (**66.8%**) in the 2016 survey

How are specialist groups faring?

Nutrition is even more vital among certain population groups, here's how they stack up



Over half of parents

50.9%

are now ensuring supplements are part of their children's diets



Around two thirds

66.1%

plan on taking more food supplements as they get older



91.5%

of women say they're aware of the recommendations surrounding folic acid supplementation for women of a childbearing age

Which, if any, of the following groups does the government advise to take Vitamin D supplements?

Pregnant and breastfeeding women	18.5%
Children aged six months – five years old	16.7%
Those aged 65 + yrs.	25.5%
People with darker skin (such as people of African Caribbean and South Asian descent)	12.4%
People who regularly cover up their skin	26.4%
Everyone during the winter and spring	31.8%
People who are housebound (stay indoors) for long periods of time	36.9%
None of the above	2.3%
I don't know	30.7%



Only around two thirds

64.8%

feel they get the right amount of vitamins and minerals through their daily diet


52.5% of UK adults are taking the same vitamin and mineral supplements as they did 10 years ago

A closer look at the market

The supplements market is diversifying, with supermarkets working harder to compete with brands in VMS offerings. Where do you buy your supplements?

SUPPLIER	2019	2016
Supermarket	41.8%	53.4
Holland & Barrett	29.0%	N/A
Local health food store	6.4%	22.0%
Boots	29.0%	N/A
Superdrug	6.6%	N/A
Pharmacy Chain	18.9%	26.7%
Online	16.6%	16.6%

Women are more likely to purchase at Boots

31.6%


The 18-24 age group is more likely to purchase at Superdrug

20.5%


Londoners are most likely to buy their vitamins and supplements from Holland & Barrett

38.5%
HOLLAND & BARRETT



Which of the following supplements do you buy on a regular basis?

PRODUCT	2019	2016
Multivitamin	42.8%	46.3%
Vitamin C	39.4%	27.4%
Fish oil/cod liver oil	28.5%	29.6%
B vitamins	24.9%	12.3%
Iron	24.6%	14.3%
Vitamin E	17.1%	5.8%
Calcium	16.1%	8.7%
Magnesium	13.4%	7.4%
Folic acid	11.8%	6.9%
Probiotics	10.7%	N/A
Glucosamine	9.1%	9.4%
Herbal/natural remedy	8.9%	7.7%

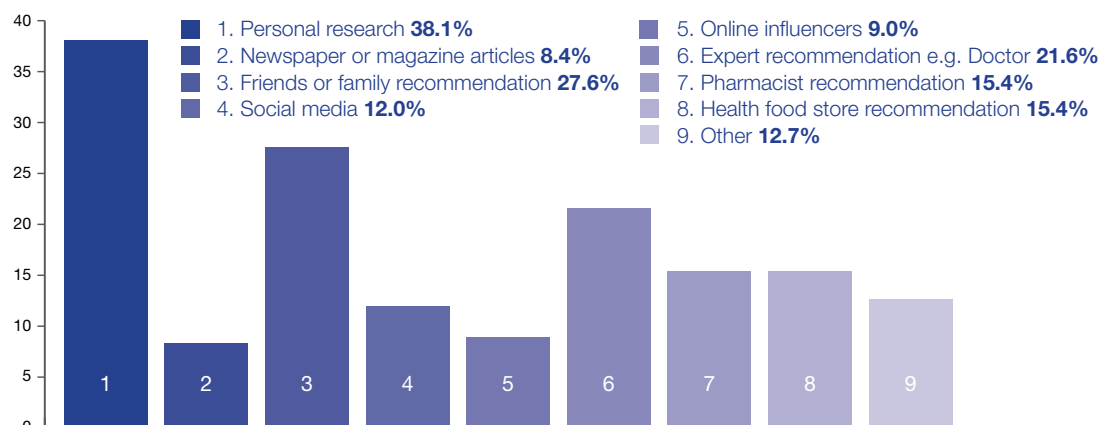
The highest online purchasers are people over 65

28.4%

compared to the national average of 16.6% across all age groups




Which, if any, of the following factors influence the vitamin/mineral supplements you buy?



Unpicking the CBD trend

The purchase of CBD food supplements, a trend which emerged on the high street in 2017, shows no sign of slowing down, with new innovations and formulations appearing each week



 **15%**
of Brits now report taking CBD supplements

1/3 of these consumers take CBD supplements every day

 **17.1%**
of men are taking CBD supplements, compared to

 **13.2%**
of women

The highest users of CBD supplements are the 25–34 group at

23%

The lowest users are the over-65s at only

4%

Of those taking CBD supplements, daily consumption is highest in the

East Midlands
39.3%

compared to the national average of 33.5%

Bristol

is the CBD capital of the UK

21.5%

Consumption on a weekly basis is highest in

London
86.1%

compared to the national average of 82.4%