Vodus Research

Health Supplement Consumer Usage & Attitude in Malaysia

Market Insights Report as of 27th September 2021

Background

- *Vodus has conducted a case study to understand the nutritional supplements market landscape in Malaysia.*
- *The study was conducted to understand the E-commerce aspect of nutritional supplements market in Malaysia and to ascertain the level of willingness of consumers to purchase nutritional supplements online.*
- *The study also aimed at ascertaining the usage and attitude of Malaysians towards nutritional supplements and platforms used.*
- *Finally, the study also aimed at mapping the consumption habits of Malaysians.*

Research Objective

Market segmentation:

- *Profile of supplement consumers*
- *Supplement brand share*
- *Most popular supplement type*

Consumption habits:

- *Measure consumption patterns among Malaysians*
- *Measure frequency of consumption*

Usage and Attitude:

- *Measure reasons of consumption*
- *Preferred platforms / channels of consumption*
- *Media habits*

Research Methodology

Online Survey Methodology

Vodus conducted the survey using online quantitative methodology with 8,197 Malaysian adults stratified to represent the Malaysian adult population profile. The data was collected via the Vodus Media Network that consists of websites from Media Prima, Astro, and Star Media Group and covers the Peninsular and East M'sia.

This is an online methodology which uses low disruption

OMTOS Method *ioneered by Vodus.*

The fieldwork wasdone from 09th to 30th August 2021

The target group for this study was as follows:

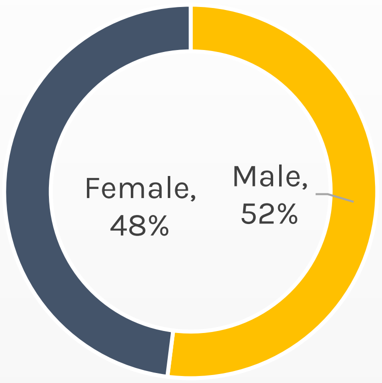
- *Local Malaysians who are 18+ years of age and belong to different ethnicities, geographic locations, gender and economic background across Malaysia*
- *Consumers of dietary and health supplements*

Vodus Research

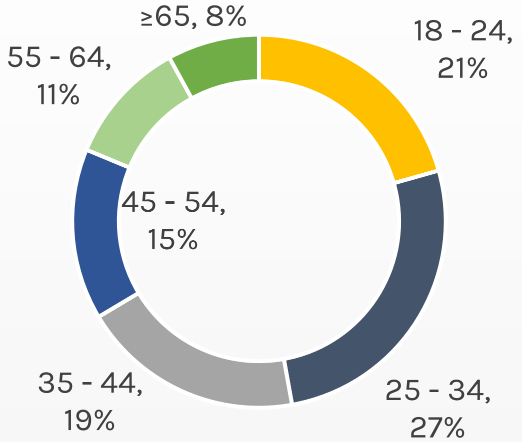
Detailed Findings

Profile of Supplement Takers / Purchasers

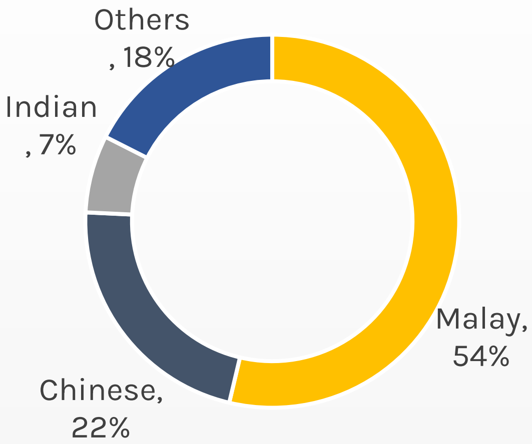
Gender



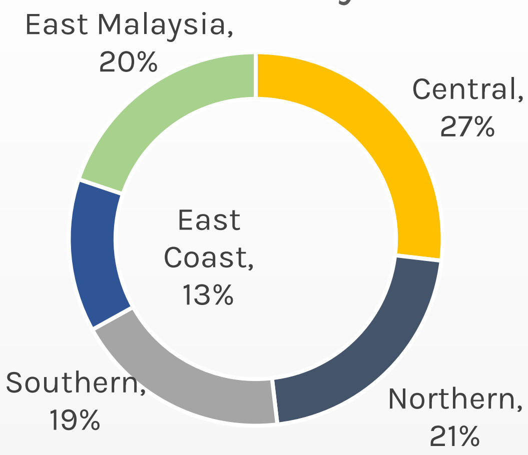
Age



Ethnicity



Locality



The target market consists of an almost equal split of males and females. Buyers aged 18 to 44 years comprise of 67% of the target market.

Malays make up slightly more than half of the target market, followed by Chinese who consist of about 1/5th of the target market.

The Central region, Northern region, and East Malaysia are the largest regions among all regions.

Base: All Respondents (n=6,508)

Consumers & Purchasers of Supplements *vs Census*

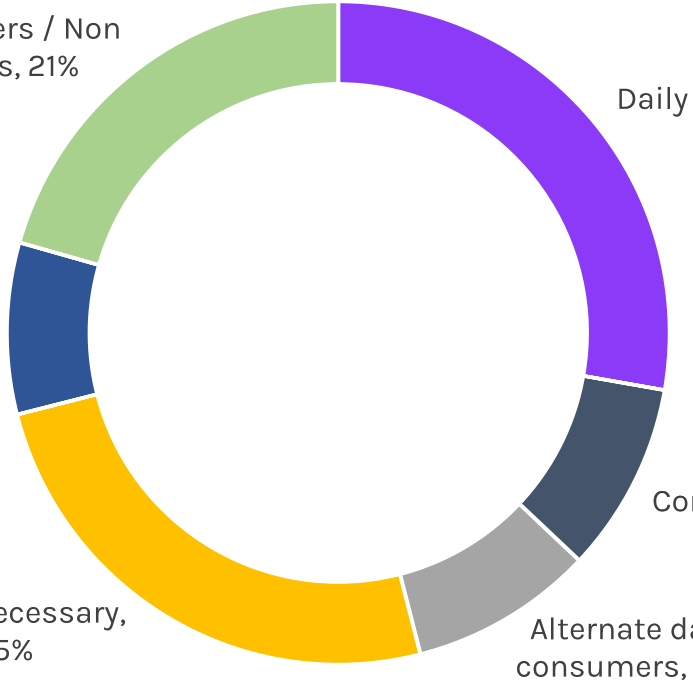
Demographic split

	Census (Malaysia)	Consumers & Purchasers of Supplements	Difference
Male	52%	52%	0%
Female	48%	48%	0%
Malay	51%	54%	3%
Chinese	23%	22%	-1%
Indian	7%	7%	0%
Others	20%	18%	-2%
18 - 24 years	20%	21%	1%
25 - 34 years	26%	27%	1%
35 - 44 years	19%	19%	0%
45 - 54 years	15%	15%	0%
55 - 64 years	11%	11%	0%
≥65 years	9%	8%	-1%
Central	26%	27%	1%
North	21%	21%	0%
South	19%	19%	0%
East Coast	14%	13%	-1%
East Malaysia	20%	20%	0%

Malays constitute a slightly higher number of supplement consumers / purchasers than the Census of Malaysia.

Base: All Respondents (n=6,508)

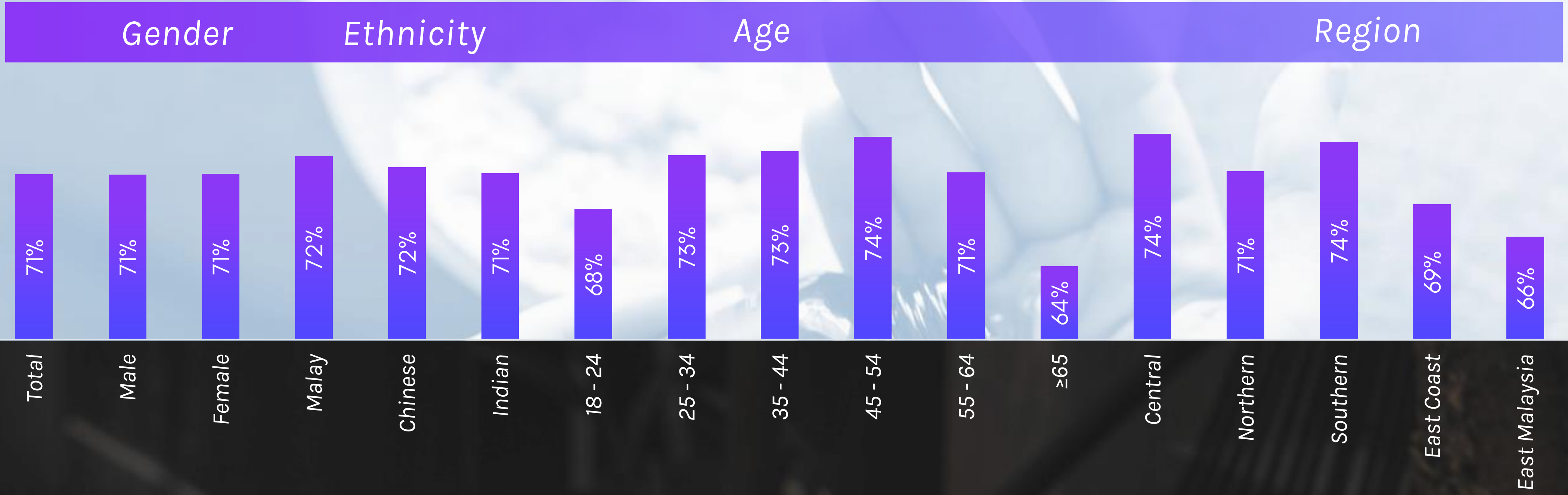
Supplement market landscape in Malaysia



About 1 in 4 of all Malaysians are daily consumers of supplements while about 1/4th consume only when necessary. About 1 in 5 do not consume or purchase any types of supplements.

Base: All Respondents (n=8,197)

Respondent Profile (Consumers of Supplements)



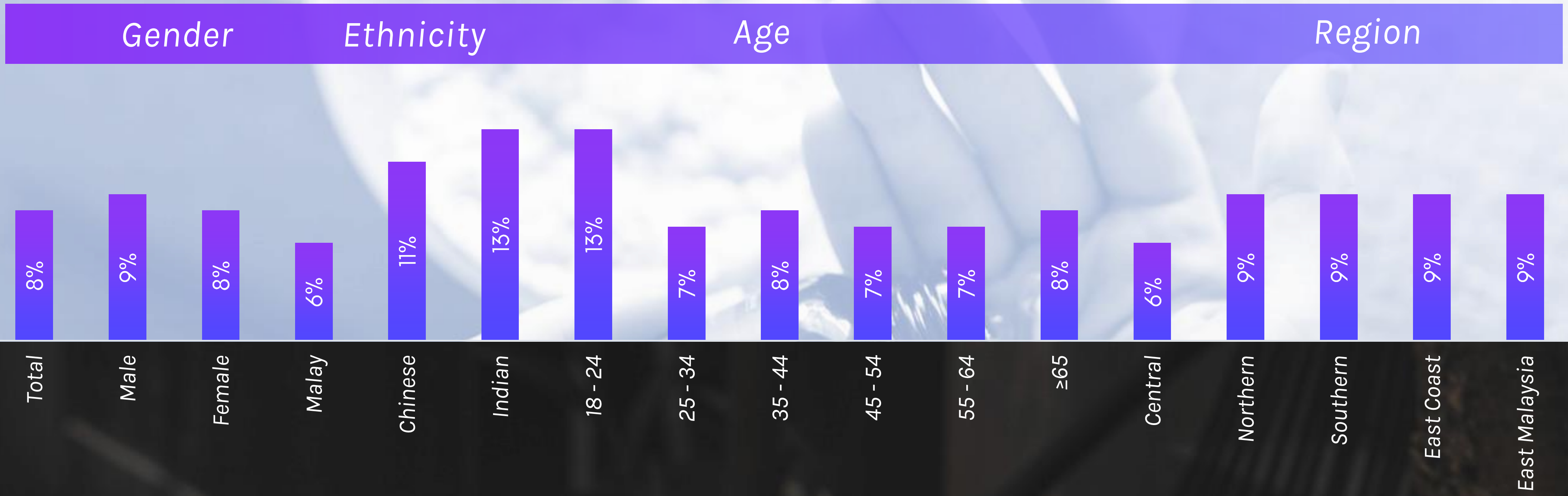
Overall, 3/4th of all respondents are consuming supplements. No difference was found among both males and females.

All ethnicities are consumers of supplements without any noticeable differences.

The young and retired are slightly behind in consumption of supplements than other age groups

Base: All Respondents (n=8,197)

Respondent Profile (Purchasers Only)



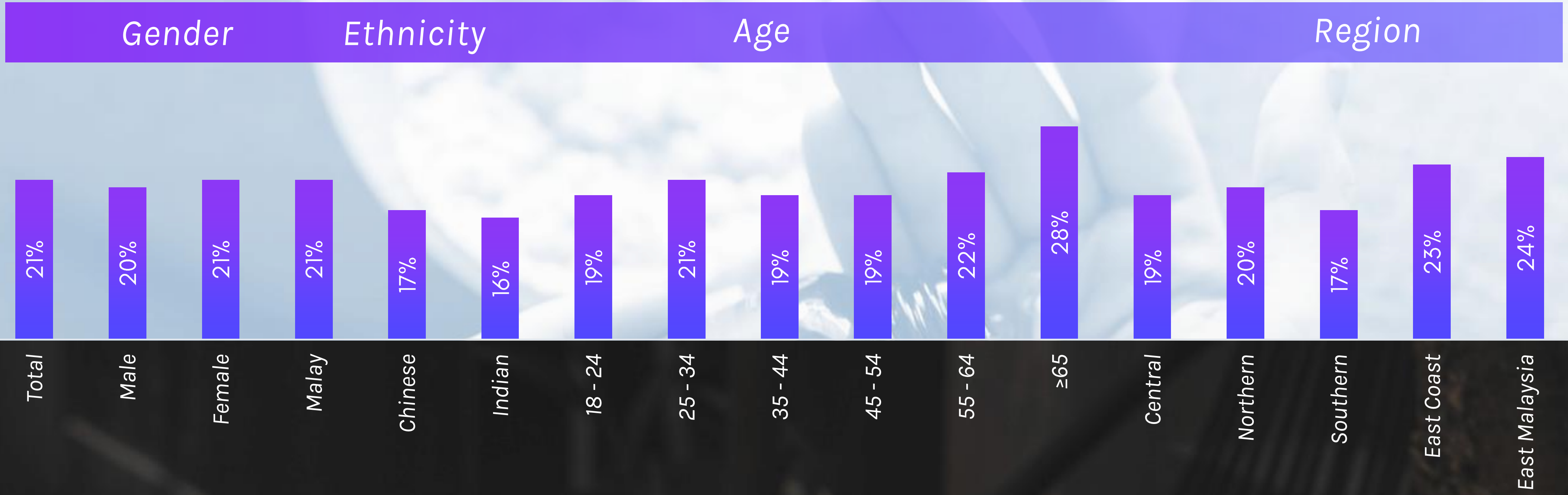
About 1 in 10 are those who are purchasers of supplements but do not consume any.

No difference was found among both genders. Malays purchase milk much less than Chinese and Indians.

A comparatively higher number of younger age group is buying for others than other age groups.

Base: All Respondents (n=8,197)

Respondent Profile (Non-Purchasers & Non-Consumers)



About 1 in 5 Malaysians are neither purchasing supplements for others nor consuming them.

No difference was found among both genders. However, Malays are slightly higher non-consumers than other ethnicities.

Non-consumption is also highest among ≥ 65 years old age group and the East Malaysia region.

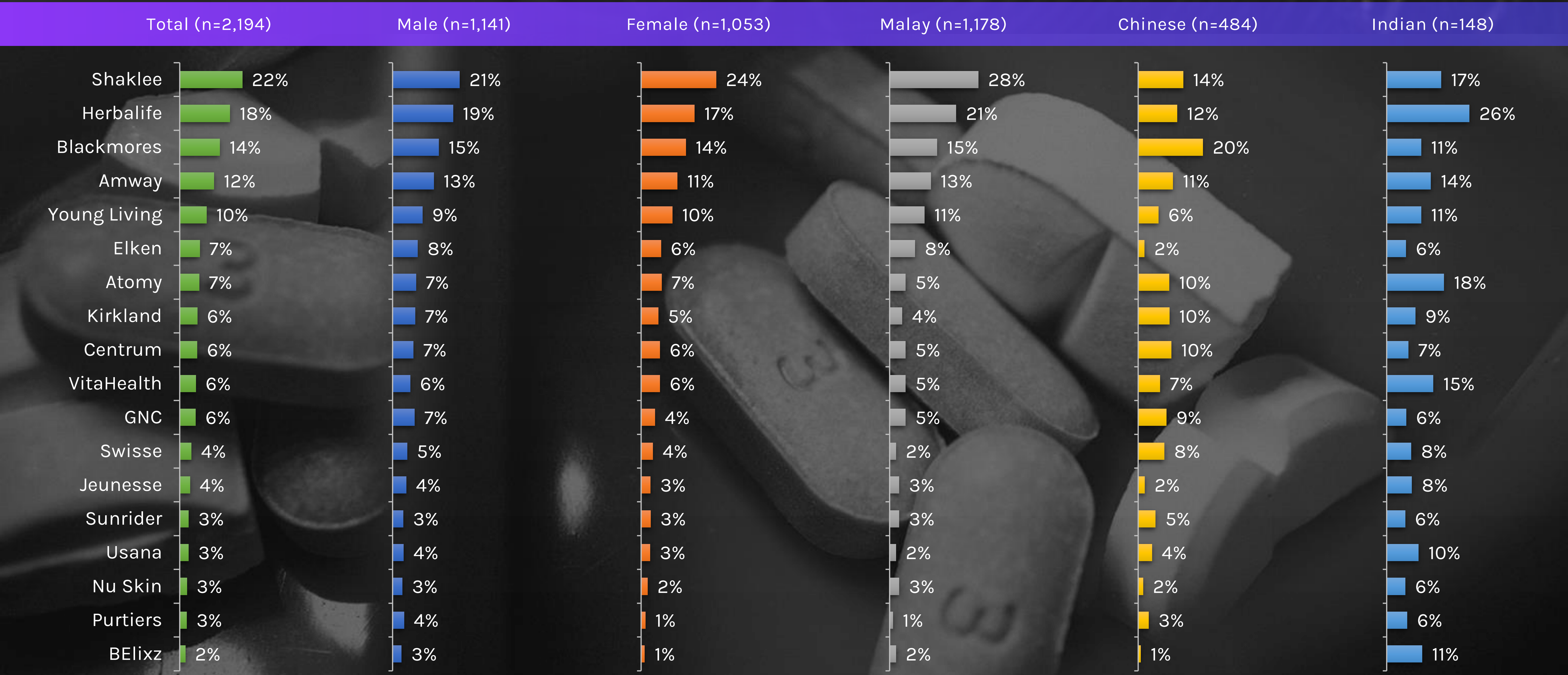
Base: All Respondents (n=8,197)

Market Segmentation

Vodus Research

Brand share (Total, gender and ethnicity)

Shaklee, Herbalife and Blackmores have the highest share among the brands measured. While Shaklee is more popular among Malays, Blackmores is more popular among the Chinese while Herbalife is more popular among Indians.

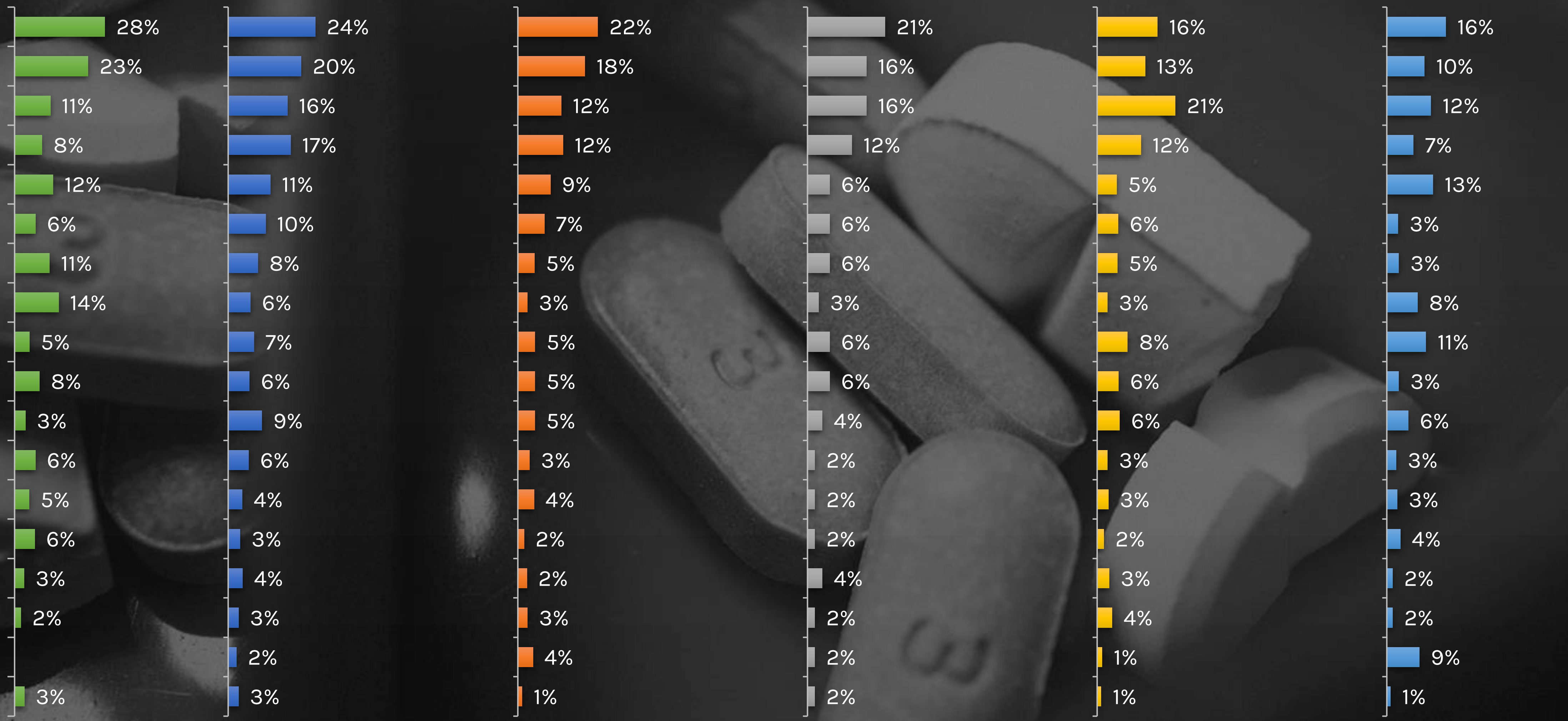


Base: All Respondents who purchase or consume supplements

Vodus Research

Brand share (Age)

While Shaklee is most popular among 18 to 54 years age group, Blackmores is most popular among 55 to 64 years age group.



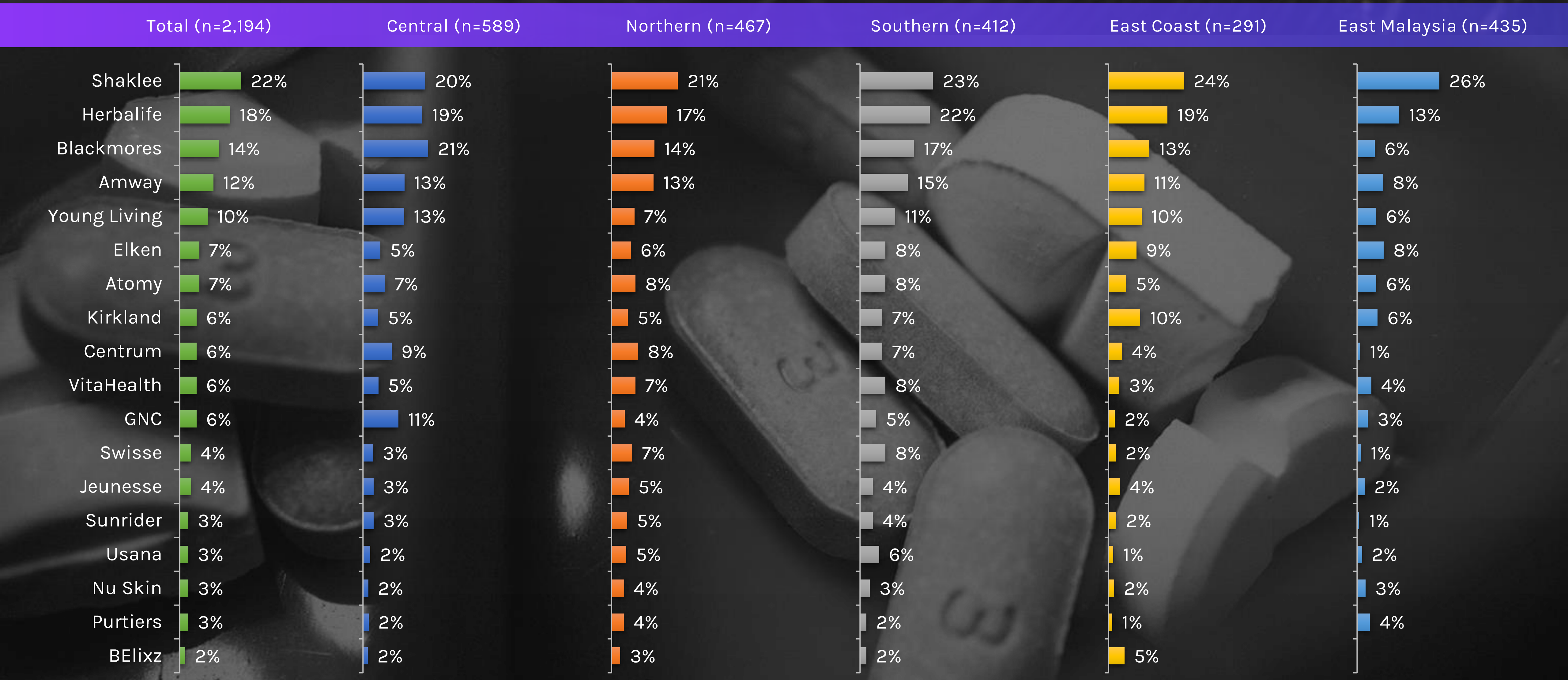
Brand	18 to 24 years (n=453)	25 to 34 years (n=582)	35 to 44 years (n=423)	45 to 54 years (n=326)	55 to 64 years (n=236)	≥65 years (n=175)
Shaklee	28%	24%	22%	21%	16%	16%
Herbalife	23%	20%	18%	16%	13%	10%
Blackmores	11%	16%	12%	16%	21%	12%
Amway	8%	17%	12%	12%	12%	7%
Young Living	12%	11%	9%	6%	5%	13%
Elken	6%	10%	7%	6%	6%	3%
Atomy	11%	8%	5%	6%	5%	3%
Kirkland	14%	6%	3%	3%	3%	8%
Centrum	5%	7%	5%	6%	8%	11%
VitaHealth	8%	6%	5%	6%	6%	3%
GNC	3%	9%	5%	4%	6%	6%
Swisse	6%	6%	3%	2%	3%	3%
Jeunesse	5%	4%	4%	2%	3%	3%
Sunrider	6%	3%	2%	2%	2%	4%
Usana	3%	4%	2%	4%	3%	2%
Nu Skin	2%	3%	3%	2%	4%	2%
Purtiers		2%	4%	2%	1%	9%
BElixz	3%	3%	1%	2%	1%	1%

Base: All Respondents who purchase or consume supplements

Vodus Research

Brand share (Region)

Shaklee, Herbalife and Blackmores have the highest share among all regions except East Malaysia, where Amway and Elken have a higher share than Blackmores.

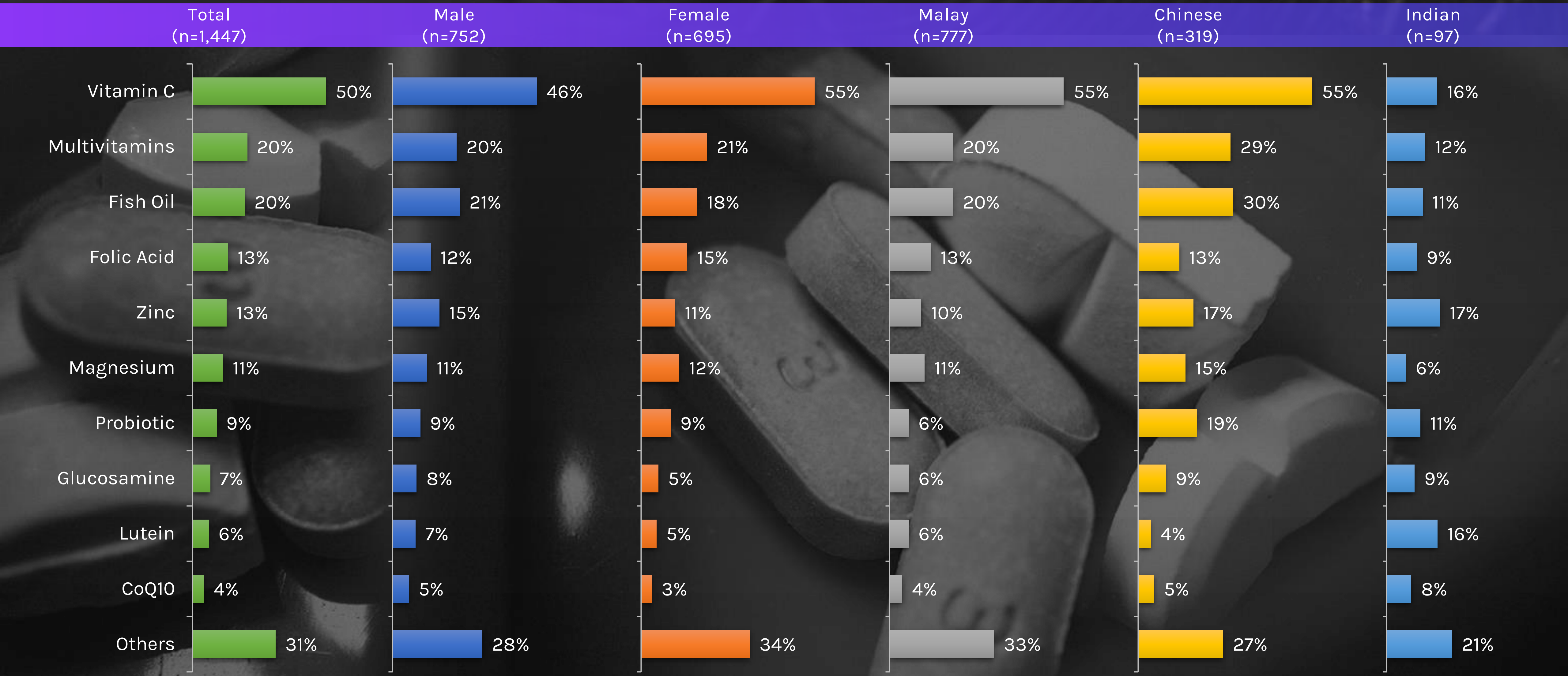


Base: All Respondents who purchase or consume supplements

Vodus Research

Supplement share (Age)

Vitamin C, followed by Multivitamins and Fish Oil are the most consumed supplements across both genders and Malay and Chinese ethnicities.

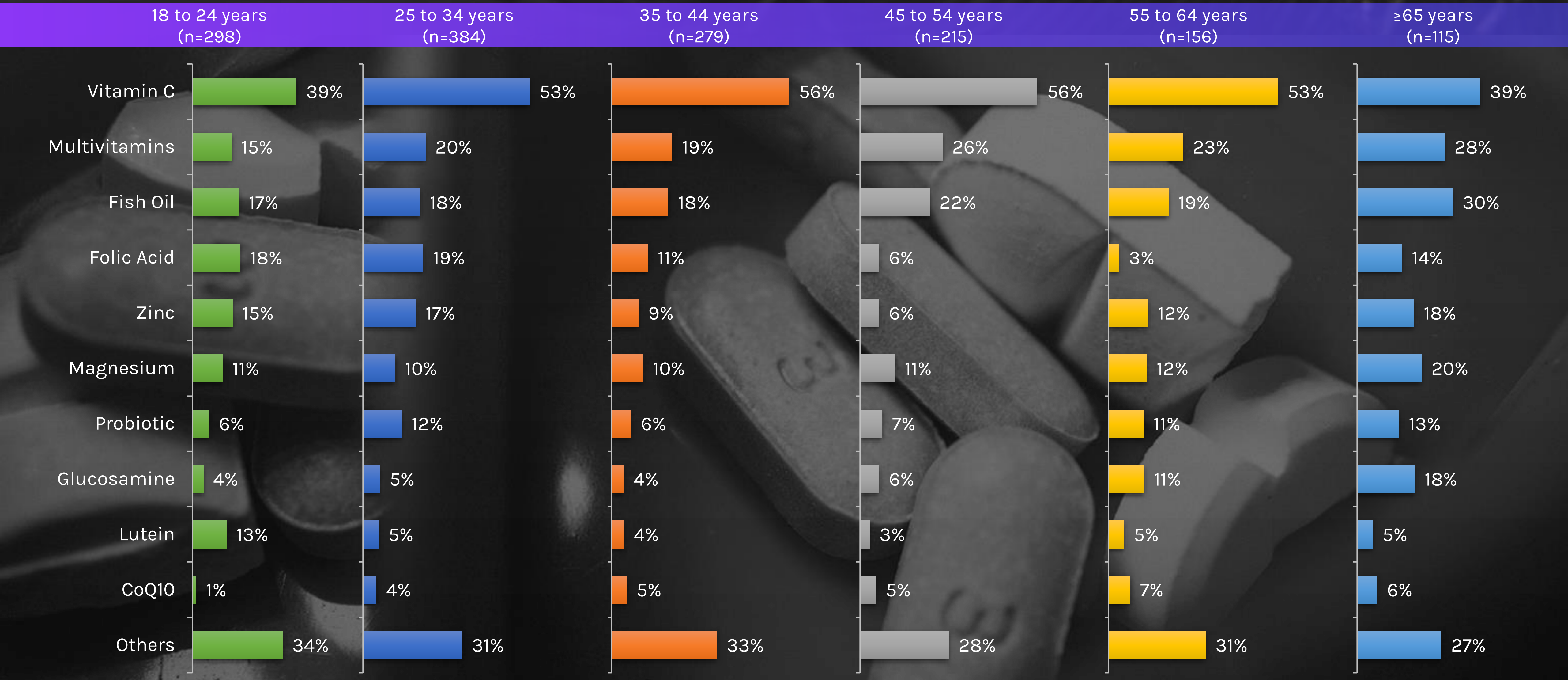


Base: All Respondents who purchase or consume supplements

Vodus Research

Supplement share (Age)

Vitamin C, Multivitamins and Fish Oil are the most consumed supplements across most age groups. Magnesium, Glucosamine and Fish Oil are consumed much more by those in the ≥65 years age group than others.

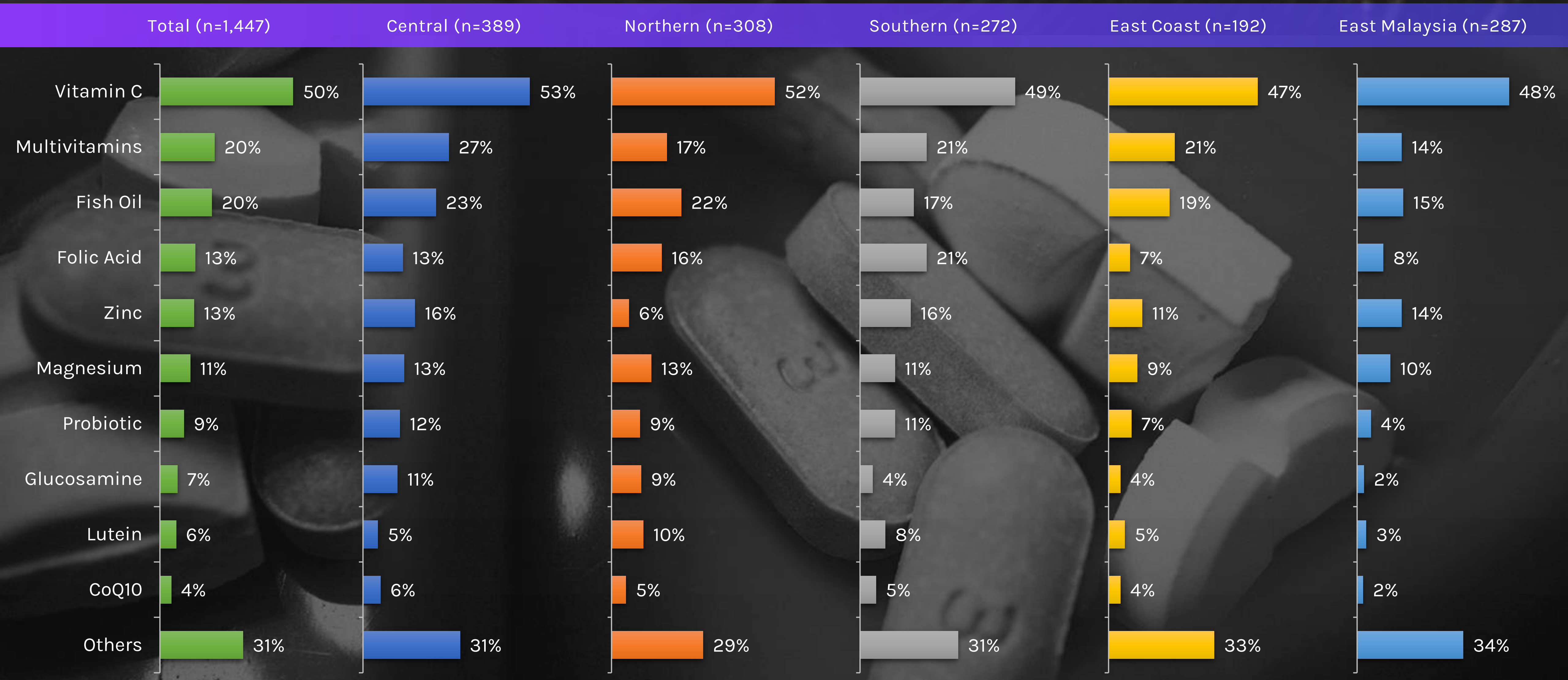


Base: All Respondents who purchase or consume supplements

Vodus Research

Supplement share (Location)

Similarly, Vitamin C, Multivitamins and Fish Oil are consumed by the most amount of consumers across most regions than other supplements.

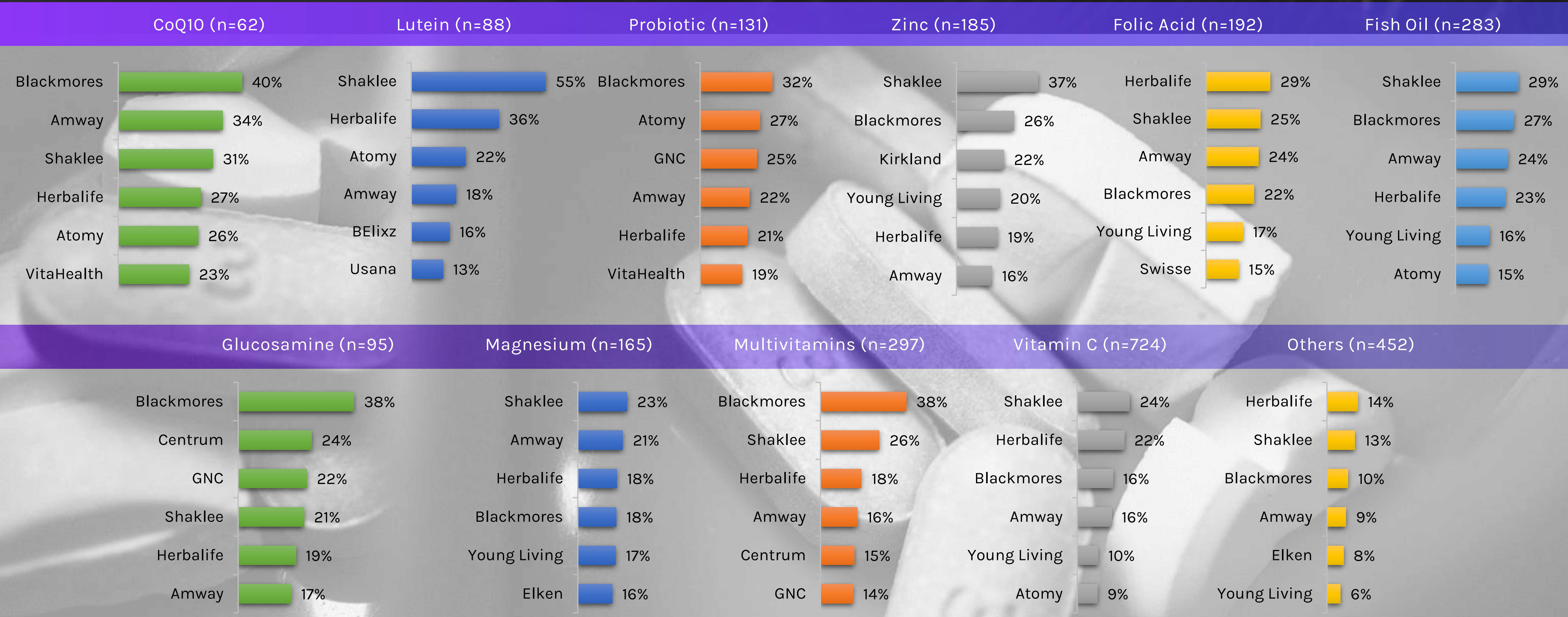


Base: All Respondents who purchase or consume supplements

Vodus Research

Brand Share by Supplement Type

Shaklee, Blackmores and Herbalife are generally the most popular brands for every types of supplement listed.



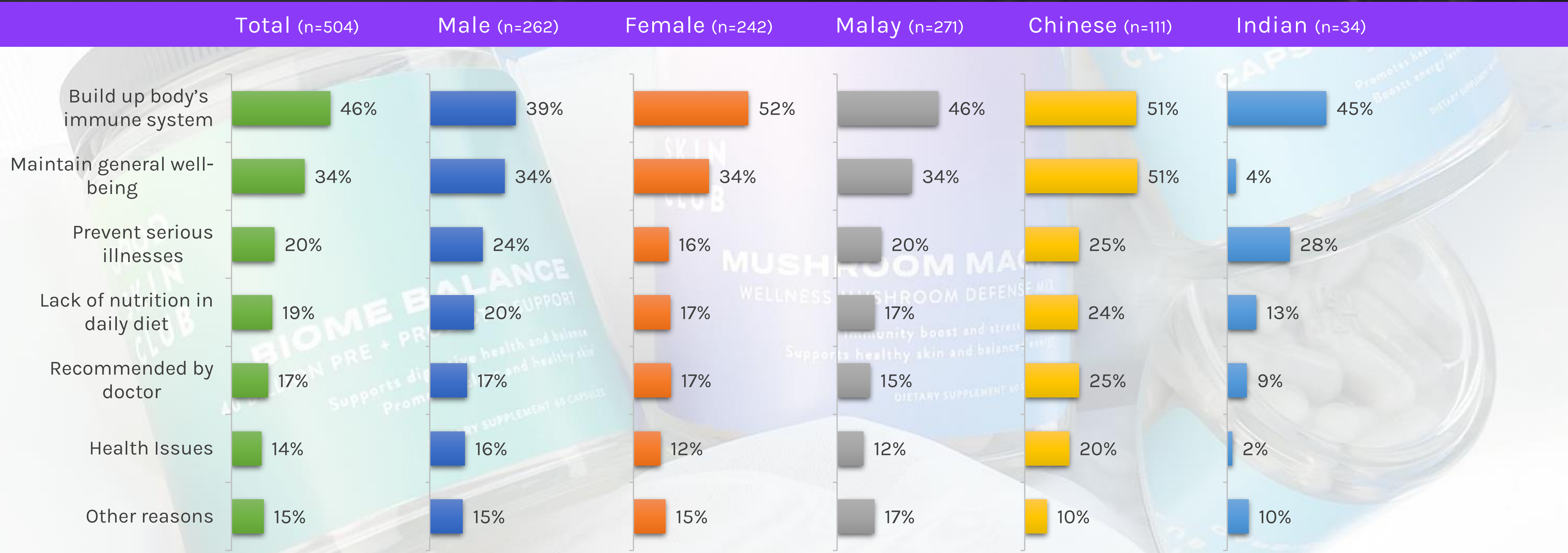
Base: All Respondents who purchase or consume supplements

Reasons to consume and Platforms visited

Vodus Research

Reasons to consume supplements (By Gender and Ethnicity)

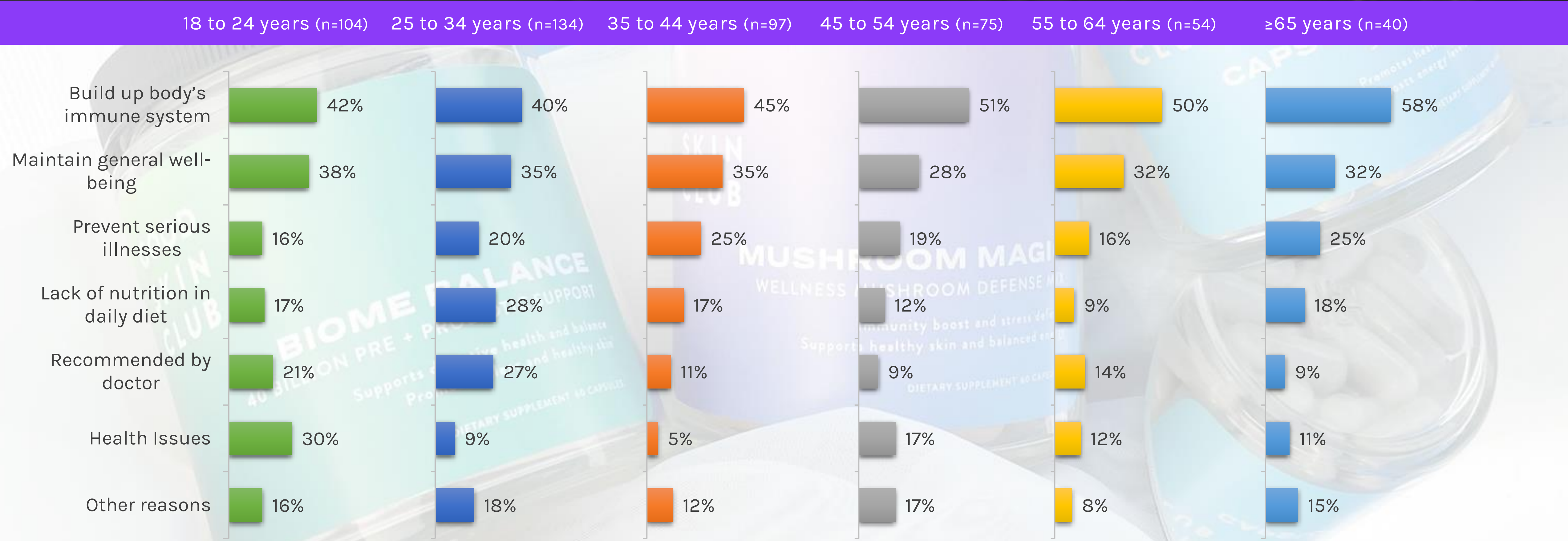
Improving immune system response, general well-being and prevention of serious diseases are the most cited reasons to consume supplements. More Females and Chinese are concerned about immune system response than others.



Base: All Respondents who purchase or consume supplements. Data in top row is mean expenditure in RM

Reasons to consume supplements (By Age)

More of those aged 45 and above cite improving immune system response as a reason for consuming supplements than younger age groups.

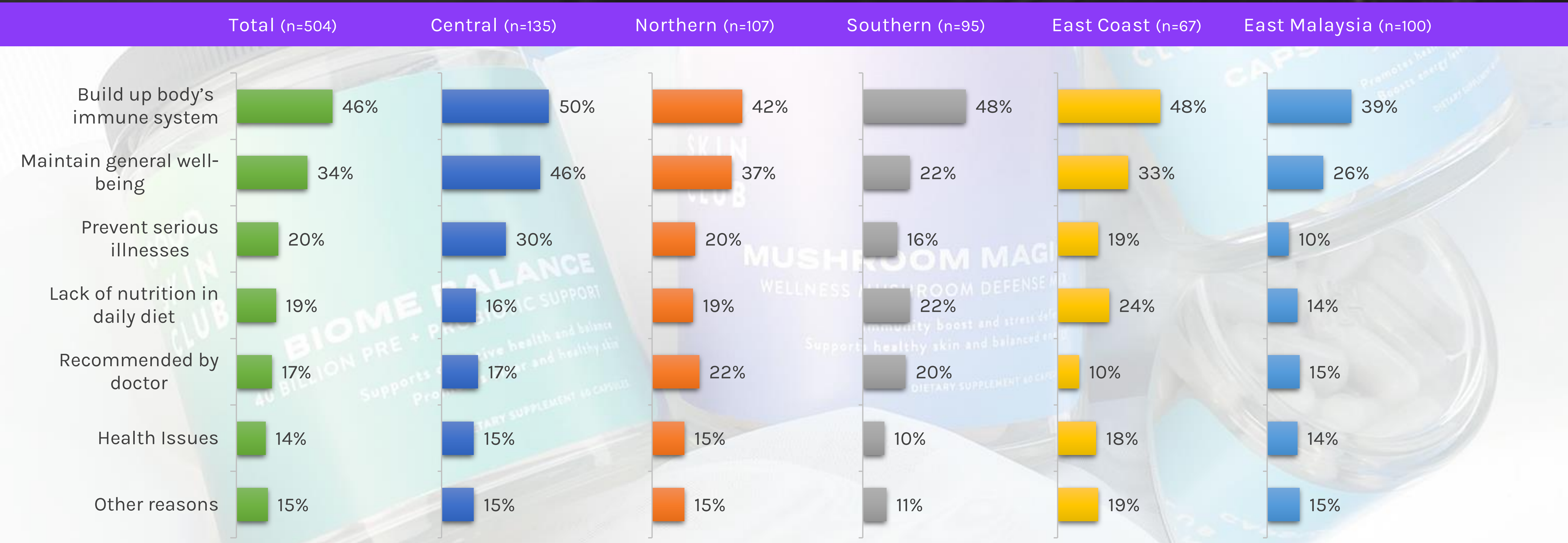


Base: All Respondents who purchase or consume supplements

Vodus Research

Reasons to consume supplements (By Location)

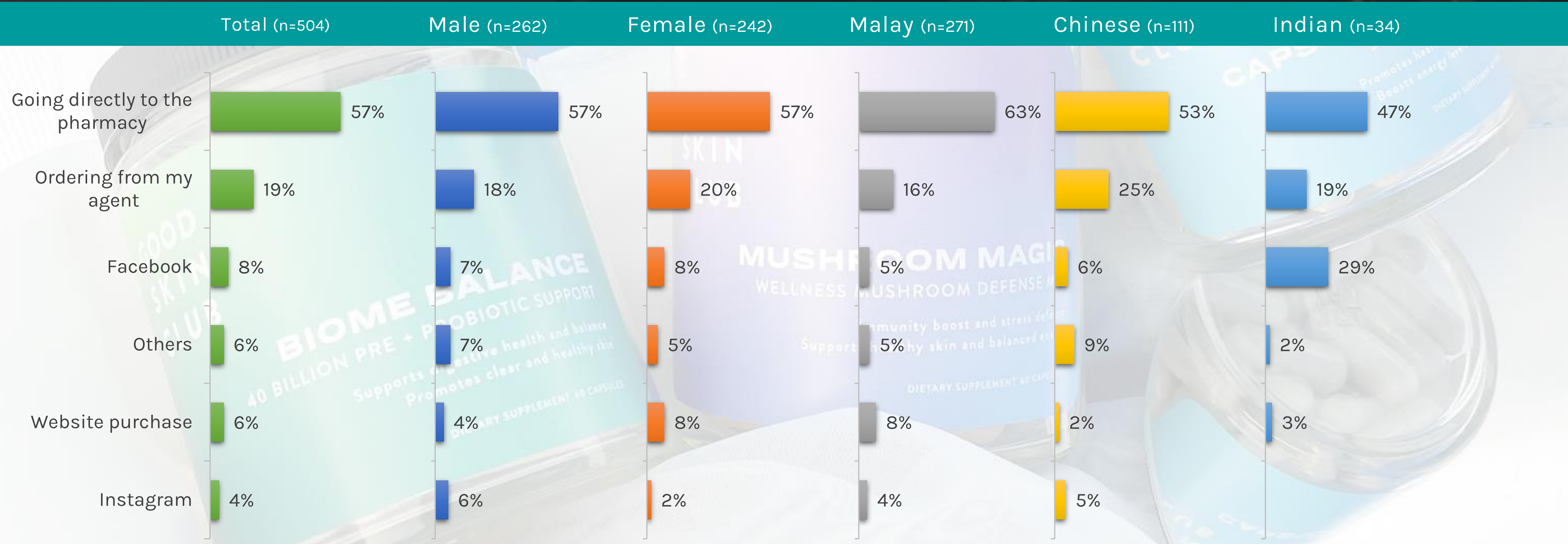
Those in East Malaysia and the Northern region are less likely to cite improving immune system response as a reason for consuming supplements. Consumers in the Central region are more likely to consume supplements to maintain general well-being and prevent serious illness.



Base: All Respondents who purchase or consume supplements

Preferred method in purchasing supplement (Gender, Ethnicity)

Most consumers purchase supplements directly from the pharmacy than through other methods. Very few consumers purchase from online websites and other social media applications such as Facebook and Instagram.

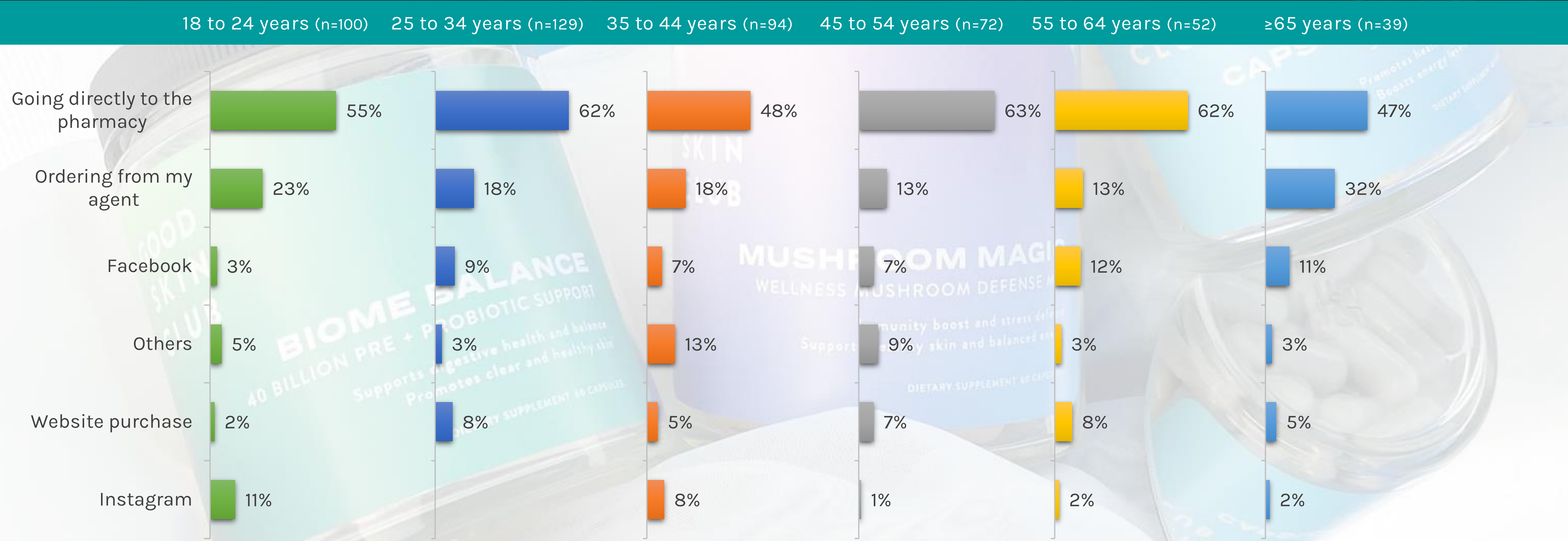


Base: All Respondents who purchase or consume supplements

Vodus Research

Preferred method in purchasing supplement (Age)

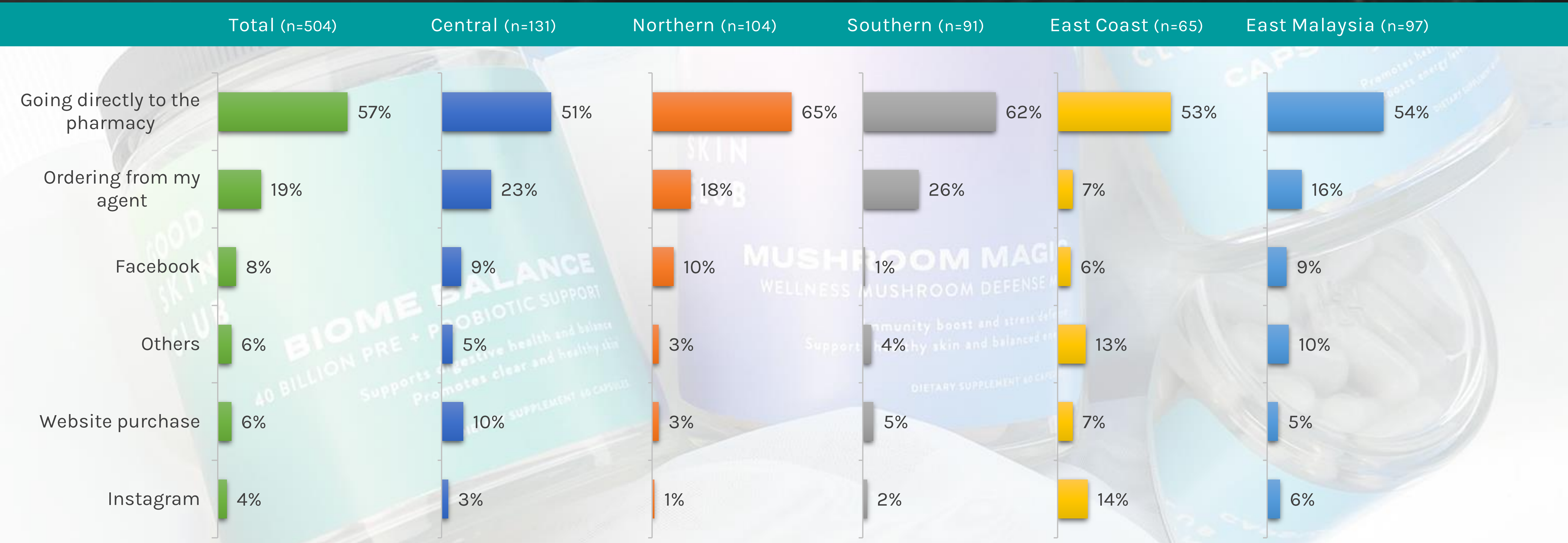
The younger population are more likely to purchase supplements via Instagram, while a higher percentage of retired consumers are purchasing from agents/ stockist.



Base: All Respondents who purchase or consume supplements

Preferred method in purchasing supplement (By Location)

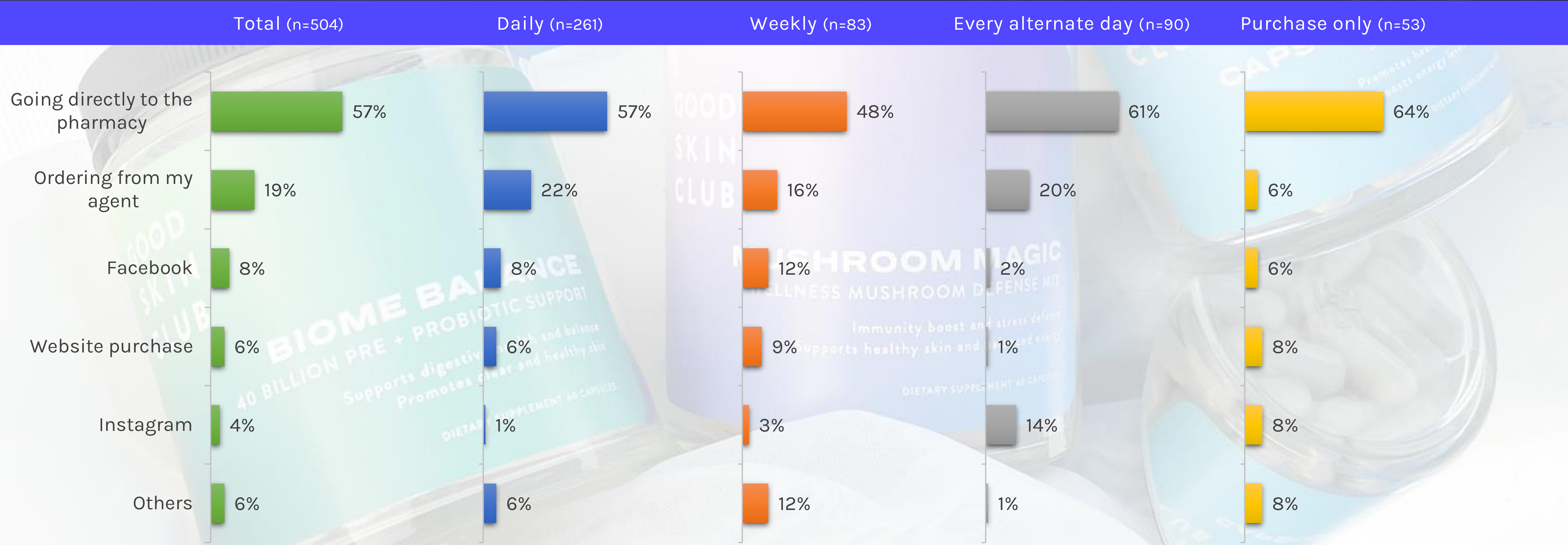
Instagram purchase is highest in the East Coast region while ordering from agents is more prevalent in the Southern and Central region.



Base: All Respondents who purchase or consume supplements

Preferred method in purchasing supplement (By frequency of consumption)

No significant differences were observed in relation to the purchase platform patterns among consumers of various consumption frequency or those who purchase supplements for others only.



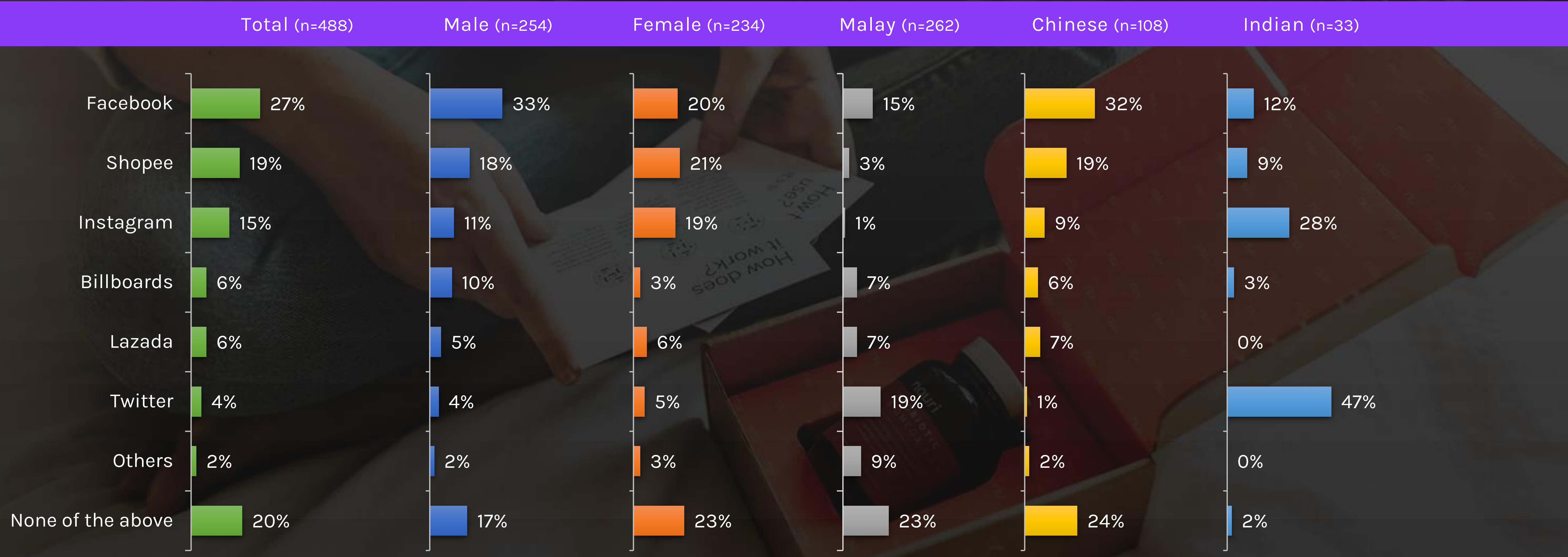
Base: All Respondents who purchase or consume supplements

Vodus Research

Media Habits

Last seen advertisement on supplements (Gender, Ethnicity)

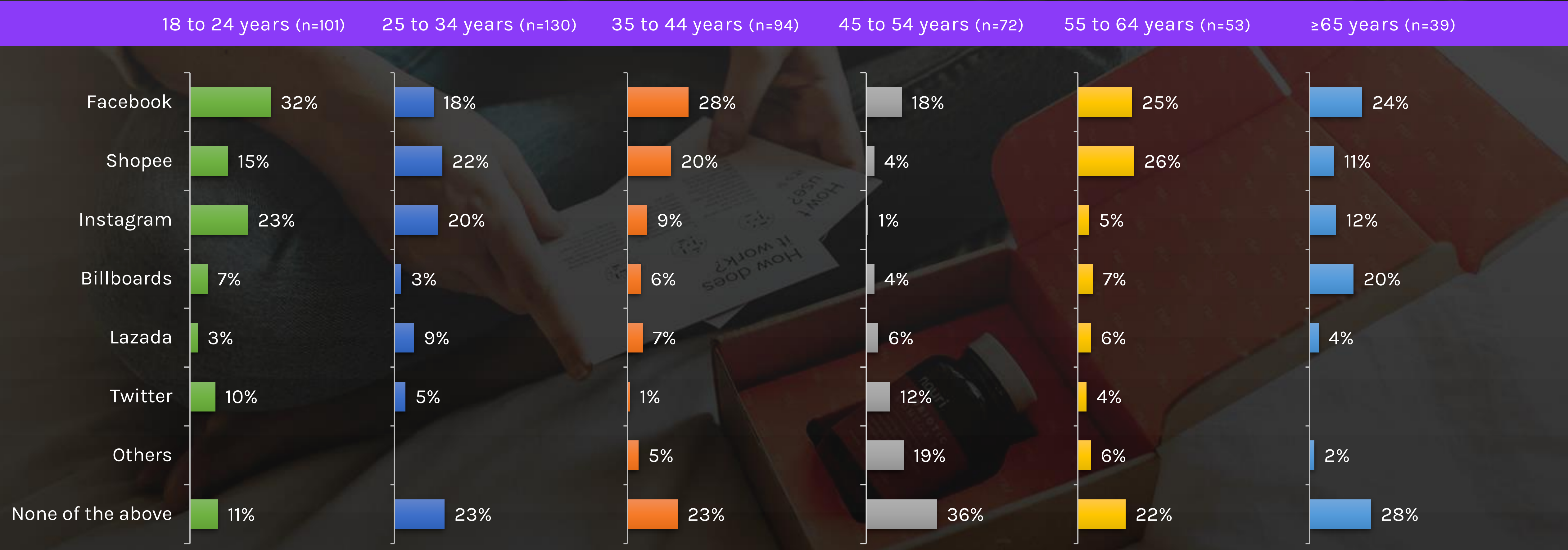
Social media websites like Facebook and Instagram and Ecommerce websites like Shopee are the highest cited sources of last-seen advertisements of supplements. Males and Chinese cite Facebook as the main source of information while Indians cite Twitter and Instagram as their main source of advertisement exposure.



Base: All Respondents who purchase or consume supplements

Last seen advertisement on supplements (Age)

The retired and elderly population is the least exposed to advertisements and a large portion of their media exposure is from traditional sources like billboards, which means they are using social media and E-commerce platforms less than others.

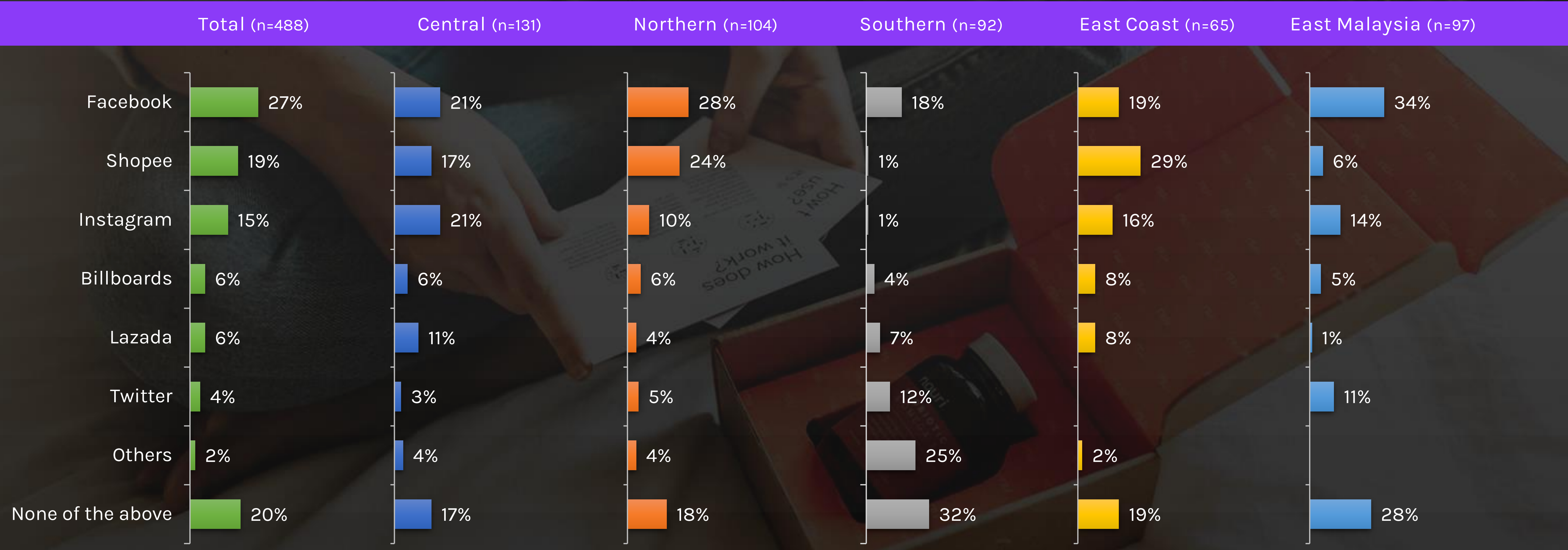


Base: All Respondents who purchase or consume supplements

Vodus Research

Last seen advertisement on supplements (Platforms)

Facebook advertisement exposure of supplements is the least among Central and East Coast regions. East Malaysians are less exposed to Shopee advertisements on supplements. Instagram exposure of advertisements is more common among those in the Central region.



Base: All Respondents who purchase or consume supplements

Summary and Conclusion

Segmentizing your Market Insights by Consumption Frequency

Profile	Daily Consumers		Weekly Consumers		Alternate Day Consumers		Purchasers Only	
Segment Share	28%		9%		9%		8%	
Brand Share	1. Shaklee	26%	1. Herbalife	18%	1. Shaklee	24%	1. Centrum	13%
	2. Herbalife	20%	2. Shaklee	16%	2. Herbalife	20%	2. Blackmores	13%
	3. Blackmores	15%	3. Blackmores	15%	3. Blackmores	14%	3. Amway	12%
Most consumed supplement	1. Vitamin C	47%	Vitamin C	55%	1. Vitamin C	52%	1. Vitamin C	53%
	2. Fish Oil	22%	2. Folic Acid	17%	2. Multivitamins	22%	2. Multivitamins	18%
	3. Multivitamins	22%	3. Multivitamins	16%	3. Fish Oil	22%	3. Zinc	16%
Reasons of consumption	1. Build immune system	48%	1. Build immune system	44%	1. Lack of nutrition in daily diet	31%	1. Build immune system	57%
	2. Maintain general well-being	35%	2. Maintain general well-being	34%	2. Build immune system	31%	2. Prevent serious illness	36%
Purchase Channel / Platform	1. Pharmacy	57%	1. Pharmacy	48%	1. Pharmacy	61%	1. Pharmacy	64%
	2. Agents	22%	2. Agent	16%	2. Agent	20%	2. Instagram	8%
	3. Facebook	8%	3. Facebook	12%	3. Instagram	14%	3. Website	8%
Source of Advertisement	1. Facebook	25%	1. Facebook	27%	1. Facebook	39%	1. Instagram	26%
	2. Shopee	21%	2. Instagram	17%	2. Instagram	17%	2. Shopee	23%
	3. Instagram	12%	3. Shopee	16%	3. Shopee	16%	3. Facebook	19%

Segmentizing your Market Insights by Demographics

<table>
<tr><th>Profile</th><th>Male</th><th>Female</th><th>18 - 24 years</th><th>25 - 34 years</th><th>35 - 44 years</th><th>45 - 54 years</th><th>55 - 64 years</th><th>65+ years</th><th>Malay</th><th>Chinese</th><th>Indian</th></tr>
<tr><td>Brand Share</td><td>1. Shaklee
2. Herbalife
3. Blackmores</td><td>1. Shaklee
2. Herbalife
3. Blackmores</td><td>1. Shaklee
2. Herbalife
3. Kirkland</td><td>1. Shaklee
2. Herbalife
3. Amway</td><td>1. Shaklee
2. Herbalife
3. Amway</td><td>1. Shaklee
2. Herbalife
3. Blackmores</td><td>1. Shaklee
2. Blackmores
3. Herbalife</td><td>1. Shaklee
2. Young Living
3. Blackmores</td><td>1. Shaklee
2. Herbalife
3. Blackmores</td><td>1. Blackmores
2. Shaklee
3. Herbalife</td><td>1. Herbalife
2. Atomy
3. Shaklee</td></tr>
<tr><td rowspan="2">Most consumed supplement</td><td colspan="10">1. Vitamin C</td><td>1. Zinc</td></tr>
<tr><td>2. Fish Oil
3. Multivitamins</td><td>2. Multivitamins
3. Fish Oil</td><td>2. Folic Acid
3. Fish Oil</td><td>2. Multivitamins
3. Folic Acid</td><td>2. Multivitamins
3. Fish Oil</td><td>2. Multivitamins
3. Fish Oil</td><td>2. Multivitamins
3. Fish Oil</td><td>2. Fish Oil
3. Multivitamins</td><td>2. Multivitamins
3. Fish Oil</td><td>2. Fish Oil
3. Multivitamins</td><td>2. Lutein
3. Vitamin C</td></tr>
<tr><td>Reasons of consumption</td><td colspan="10">1. Build immune system
2. Maintain general well-being</td><td>1. Prevent serious illness
2. Maintain general well-being</td></tr>
<tr><td>Purchase Channel / Platform</td><td colspan="10">1. Pharmacy
2. Ordering from agent</td><td>1. Pharmacy
2. Facebook</td></tr>
<tr><td>Source of Advertisement</td><td>1. Facebook
2. Shopee</td><td>1. Shopee
2. Facebook</td><td>1. Facebook
2. Instagram</td><td>1. Shopee
2. Instagram</td><td>1. Shopee
2. Instagram</td><td>1. Facebook
2. Shopee</td><td>1. Shopee
2. Facebook</td><td>1. Facebook
2. Billboards</td><td>1. Facebook
2. Instagram</td><td>1. Facebook
2. Shopee</td><td>1. Twitter
2. Instagram</td></tr>
</table>

Vodus Research

Summary

Customer Profile

71% of respondents are consumers of supplements with 45% of those who are consuming daily, alternate day or weekly.

About 1 in 10 are purchasing only for others while 21% are non-consumers and non-purchasers of supplements.

The target market consists of an equal split of males and females and buyers aged 18 to 44 consist of 2/3rd of the market.

No significant differences were found among various ethnicities.

Supplement Usage & Frequency

Vitamin C is the most consumed supplement, followed by Multivitamins, Fish Oil and Folic Acid.

Magnesium, Glucosamine and Fish Oil are consumed much more by retired population (≥65 years age group) than others.

Shaklee, Herbalife and Blackmores have the highest brand share. 4 of the 5 most popular brands are sold only via multi-level marketing (MLM).

Shaklee is more popular among Malays, Blackmores is more popular among the Chinese and Herbalife is more popular among the Indians.

About 28% are consuming supplements daily, 9% on alternate days and 9% weekly.

Summary

Reasons of Consumption and Place of Purchase

Immune system improvement is the most cited reason for consumption of supplements followed by maintaining general well-being.

Chinese and Females are more concerned about immune system improvement than others.

Chinese also cite maintaining general well-being as a reason to consume supplements more than others.

Also, those 45 and above are more concerned about improving immune system response than younger age groups.

Pharmacies are the main place of purchase while purchase from online sources is minimal.

Media Habits

Online sources such as social media websites (Facebook and Instagram) and E-commerce websites (Shopee) are the highest mentioned sources of exposure to advertisements of supplements.

Facebook is most cited by Males and Chinese as the main source of advertisement exposure while Indians cite Twitter and Instagram.

The retired population is the least exposed to advertisements overall and mentions exposure from traditional media much more than others.

Conclusion: Increasing online uptake

Malaysia has a high consumption of supplements amongst its adult population. 71% of Malaysian adults are consumers while 45% are regular consumers (daily, alternate day or weekly).

They are consuming it mostly to maintain immune system, maintain general well-being and prevent disease.

However, most of this purchase is coming form offline channels purchasing directly from pharmacy (6 in 10 respondents) and about 2 in 10 purchasing from agents. Online channels are preferred only by 2 in 10 consumers.

4 of the top 5 supplement brands measured are brands that are mainly sold via multi-level marketing (MLM), indicating that Malaysian supplement market landscape is dominated by MLM.

A dedicated platform providing home delivery and expert advice may lure only 1/4th of the respondents to purchase from such a platform. Hence, further probing is needed to identify the reasons for preferring the offline channels and how the uptake through online channels can be increased (such as this concept) and how online discounts might affect purchase intention.

Exposure to supplement advertisements are mainly found on Facebook, Shopee and Instagram. Hence, businesses should ensure that their brands are well marketed in these spaces.

Vodus Research

Want to learn more about us ?

Vodus pioneers the effortless One-question Media Tracking Online Survey (OMTOS) methodology that enables 17 million Malaysians to be surveyed across the online media network of the largest media groups in Malaysia (Astro, Media Prima, The Star) to obtain market insights that are faster, more representative, accurate and cost effective.

For more information please visit:

https://vodus.com

Our Solutions

By having vast amount of market data on Malaysian consumers, we are in prime position to help businesses grow and gain market share through our solutions.

Insights Solutions:

1. Product Test
2. Target Market Research
3. Brand Health Tracker
4. Marketing Campaign Impact Survey
5. Customer Satisfaction Survey

VODUS RESEARCH

PHONE NUMBER

+604 281 4187

EMAIL

contact@vodus.com

OUR OFFICES

Kuala Lumpur

A-10-01, Tower A, Pinnacle PJ,
Lorong Utara C, PJS 52, 46200
Petaling Jaya
Selangor, Malaysia

Penang

Plot 96, IV, Solok Bayan Lepas,
11900 Bayan Lepas
Penang, Malaysia

312-E, Jalan Perak, 11600
George Town,
Penang, Malaysia