

Consumer Healthcare Products Association

- Situation** The Consumer Healthcare Products Association (CHPA) is a national association that represents leading manufacturers and marketers of over-the-counter medicines, dietary supplements, and consumer medical devices. Recently it had initiated the process for developing the industry's first Dietary Supplement Index Reports, which would provide valuable reference information on vitamins, minerals, and other non-prescription specialty items to consumers, insurers, healthcare providers, and legislators. The organization needed a compelling presentation for the reports and associated materials, and enlisted TDC to create these assets.
- Solution** TDC developed a colorful and engaging look-and-feel for the initial slate of deliverables. These included a logo for the Index Reports, a PPT presentation with stylized graphs and charts, and a one-page leave-behind document. These materials provided CHPA with tools to meet immediate needs and a foundation for other materials in development.
- Result** CHPA was highly complimentary of TDC's work to date and eager to advance content for the Index Reports. Upon finalization of the content, TDC will design a set of five Index Reports in both printed and interactive PDF formats, as well as posters and banner-up displays for in-person events.

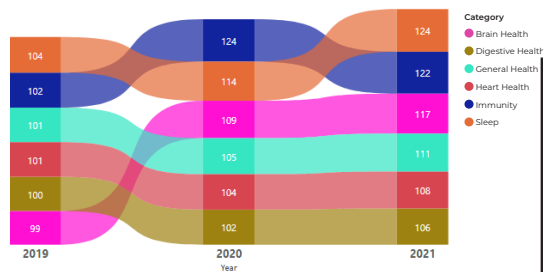
- campaign identity
- one pager

DSX

DIETARY SUPPLEMENT INDEX

Initial Key Findings

Index—By Category—All Standard Regions



Between 2019 and 2021, the overall DSX score increased nationally in every category, but growth was led by sleep, immunity, and brain health. During the global pandemic, consumers initially focused on immunity to help themselves stay healthy during COVID-19. But as more variants emerged in 2021, consumer interest shifted to brain and sleep supplements to address stress resulting from the ongoing pandemic, while immunity supplements fell slightly.

Notably, the spike in immunity and brain products mirrors three significant trends: increased public attention to COVID-19, increased public anxiety about the economy, and complications from work-at-home requirements. Those hardest hit by these were working age adults, especially those in urban settings.

Future of the DSX

CHPA intends to use the DSX to shape conversations with policymakers, providers, and insurers by identifying key trends and underlying factors that drive changes in dietary supplement use. Targeted reports will be developed to enhance stakeholder conversations and increase the credibility and visibility of supplements as part of the future of healthcare.



DSX

DIETARY SUPPLEMENT INDEX



CHPA's Dietary Supplement Index (DSX) is a data-driven tool to help CHPA educate legislators, policymakers, and other stakeholders on the value of dietary supplements in health care systems. The DSX collates market data, geographic/demographic data, government data about health status, and nutrition, along with periodic consumer surveys, to identify trends and insights in the dietary supplement marketplace.

Objectives

- To provide a platform for increased awareness and use of dietary supplements
- To persuade health insurers, large employers, and benefits consultants to include dietary supplements in benefits/plan designs
- To encourage healthcare providers to recommend dietary supplements to patients
- To promote favorable news coverage about the safety and benefits of dietary supplements

Foundational Themes

Consumers, health insurers, employers, and primary care providers are increasingly recognizing the value of preventive health and wellbeing. Dietary supplements are cost-effective front-line mechanisms for supporting overall health and wellness, as well as for augmenting management of certain health conditions.

DSX Methodology

The DSX is a score reflecting dietary supplement category/subcategory unit sales for a period (quarter/year). The baseline score is "100" for 2019 in each category/subcategory based on pre-pandemic sales.

The primary source of data used to calculate the DSX score is SPINS data. The DSX score can be calculated at a county, state, or regional level and comparisons can be made across demographics. Changes in DSX score can be further elucidated by overlaying the DSX with other public data sources that include, the National Health and Nutrition Examination Survey (NHANES), Center for Disease Control and Prevention (CDC), Centers for Medicare & Medicaid Services (CMS), and others.





Household Survey Methodology

Methodology
5-minute online survey

Fieldwork
12/03/21 – 12/13/21

Analysis
Significance testing across demographic groups with n size above 30 conducted at 90% confidence level. Differences called out within report.

Product	N=
General Health Supplements Buyers	322
Digestive Health Supplements Buyers	215
Immunity Supplements Buyers	212
Heart Health Supplements Buyers	211
Brain Health Supplements Buyers	142
Sleep Supplements Buyers	213

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Role of the Provider

Provider Recommendation (General Health)

19% 81%

37% 44%

- Didn't see PCP 19%
- Saw PCP within Past Year 81%
- Recommended supplement 37%
- Didn't recommend supplement 44%

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Category Spending Trends

All Census/Standard Region Results (End of Year)

Year	Brain Health	Digestive Health	General Health	Heart Health	Immunity	Sleep
2019	104	102	101	101	100	99
2020	124	114	109	105	104	102
2021	124	122	117	111	108	106

Common theme:
General Health dominates in sales volume but falls short in growth. Brain Health and Sleep dominate the latter.

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