'Heavy Buyers' Decline

TABS study shows fewer in Mass Market

The 2016 TABS Analytics Vitamin Study showed that the mix of category buyers is changing. The number of heavy buyers (3 or more types in a year) has decreased and the number of light buyers (1-2 types) has increased. Purchase penetration, buying a type at least once in the past year, for these buyer types looks different than it did in 2014.

1%

Total penetration increased slightly from 2014 to 2016.

54%

Light buyer penetration has increased from 47% in 2014 to 54% in 2016

23%

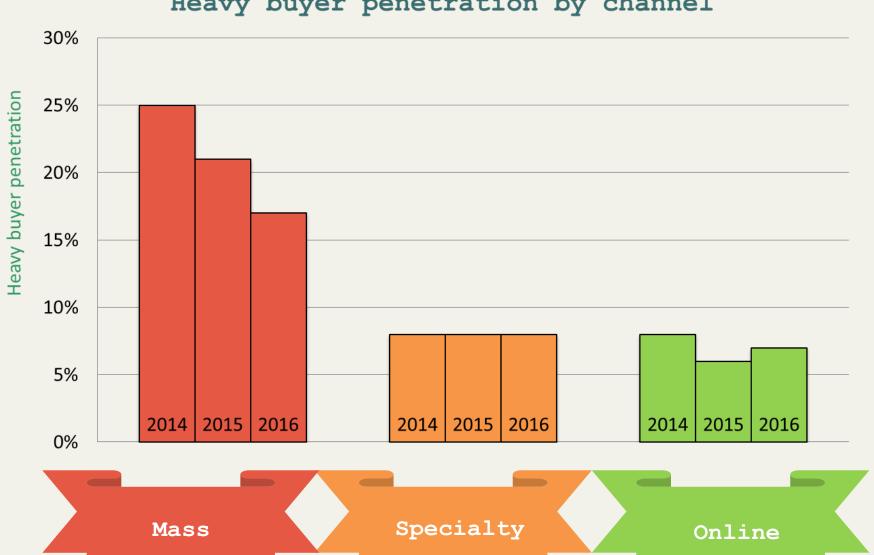
Mass market (FDMCD*) incidence decreased 4% from 69% in 2014 to 65% in 2016.

Heavy buyer penetration has dropped from 28% in 2014 to 23% in 2016.

The decrease in heavy buyers has come entirely from Mass Market/FDMCD stores.



Heavy buyer penetration by channel





As a result, share is down for most mass market outlets in 2016 and up for most specialty outlets.

Retailers with outlet share declines

Vitamin World Rite Aid Wal-Mart Walgreens **GNC Target Natural Food** Sam's Catalogue Vitamin Shoppe

*FDMCD is defined as Food, Drug, Mass, Club and Dollar stores.

Retailers with outlet share gains



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