



White Paper

Immune Support Supplement Category Market Insights



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Introduction

It is no surprise that the COVID-19 pandemic has profoundly influenced the ways in which consumers navigate personal wellness, especially in terms of healthy immune function and maintenance. As consumer awareness of the importance of immunity increases, so too does consumer demand for dietary supplements designed to support immune health.

For consumer health and supplement companies working to innovate in the immune health space, these developments present considerable opportunity.

A recent survey conducted by Sprim—which gathered data from more than 1,000 participants across the United States, Mexico, and Brazil—sought to capture insights into these changing attitudes and purchasing behaviors. The five major findings of this survey are a strong foundation for companies in the immune support category seeking to serve the needs of this evolving consumer.

5 key takeaways

- 61% of consumers began or increased their purchasing of dietary supplements for immune support in the wake of COVID-19
- Scientific/clinical trial evidence was the most important consideration to consumers when choosing an immune support supplement
- Vitamin C and D are the top two most popular ingredients among consumers for immune health
- While most consumers in Mexico and Brazil purchase their supplements from drugstores, consumers in the US primarily purchase their supplements from online mass-market stores
- Feeling “tired and rundown” is the #1 buying trigger for immune supplements across all regions

Increased Demand for Immune Health Supplements Due to COVID-19

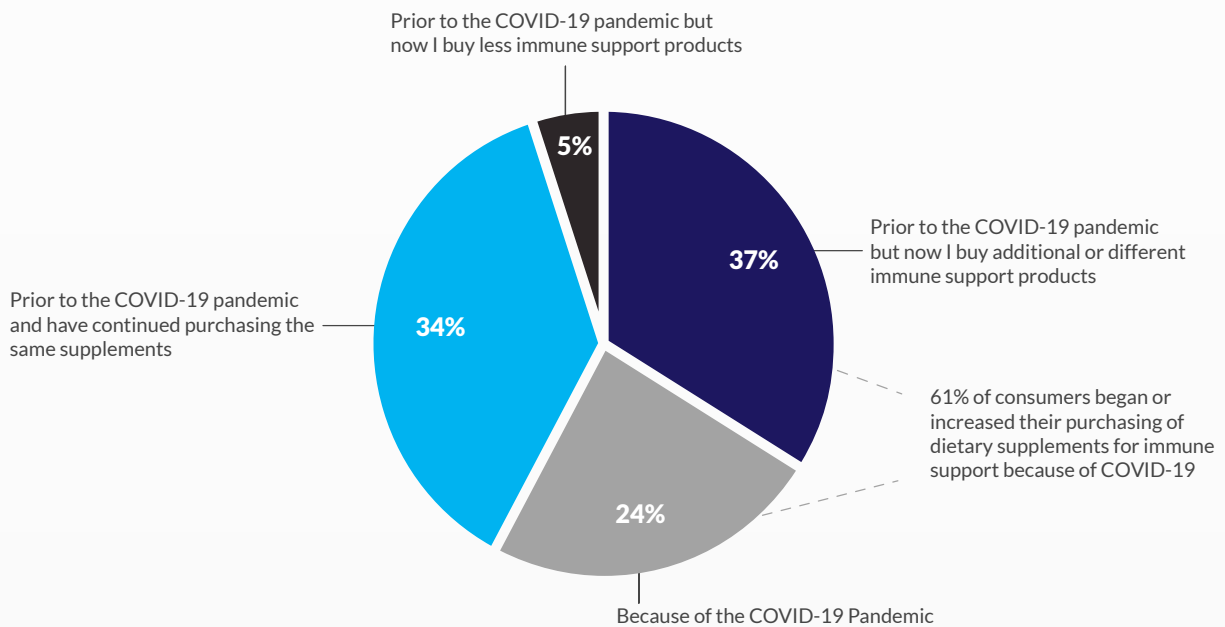
As the world seeks to fend off COVID-19—by any and all means—discourse on immune function and its relationship to the virus has run rampant. Consumers have been inundated with fear-inducing media reports decrying the immune system’s overactive response to COVID-19 and how this reaction may lead to severe inflammation or even organ failure. Many reports highlight the dangerous risk the virus poses to immune-compromised individuals, while others tout the lucky few “super immune” who produce an excess of antibodies that shield them from infection.



Consumer sentiment regarding these discourses is reflected in the numbers. 57% of participants in SPRIM's survey claim that they are concerned about their immunity because of COVID-19. This increased awareness, and associated anxiety, is driving rapid growth in the global immune health supplements market, which is now projected to expand from \$20 billion in 2021 to \$31.5 billion in 2028.

The immune support category is seeing new entrants, as well as an increase in consumer purchasing volume and regularity. Approximately, 61% of global consumers who have purchased a dietary supplement in the past 12 months say they either began or increased their purchasing of supplements for immune health during the pandemic.

**Please choose the statement that best describes you (N=626);
“I started purchasing dietary supplements for immune support...”**

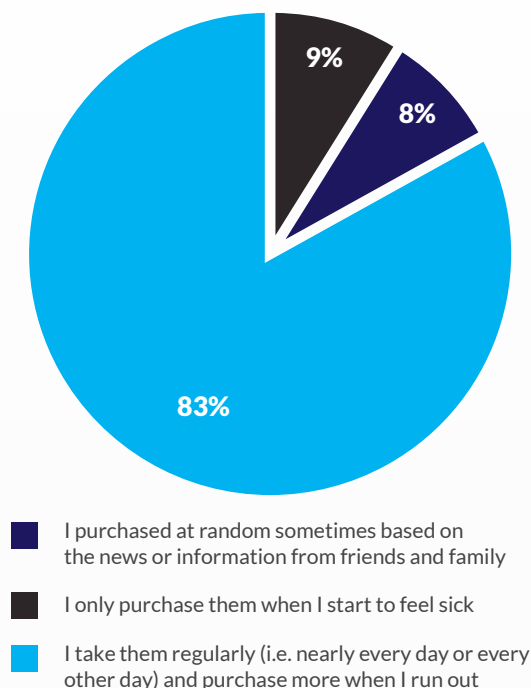


Not Only Are They Buying More—Consumers Are Taking Supplements More Regularly

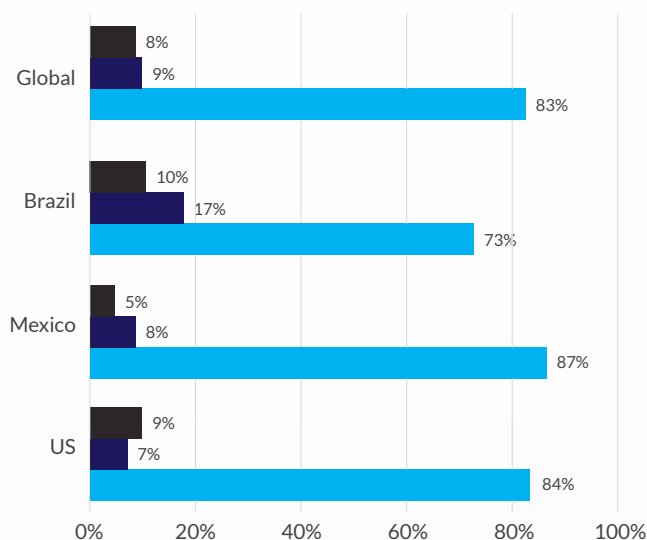
Historically, purchasing patterns in the immune support category has been seasonal, with demand spiking during the winter months as cold and flu cases rise. Now, as the world continues to struggle with the impacts of COVID-19, 83% of consumers say they take an immune support supplement every day and buy more when they run out. The industry is responding to this increased purchasing frequency. GSK, for example, announced that it will begin promoting its Emergen-C product year-round versus only during cold and flu season.



Which best describes when you use dietary supplements for immune support?



Percentage of resident that take dietary supplements regularly (i.e. nearly every day or every other day) and purchase more when they run out:



The Rising Demand for Clinical Evidence From Consumers

Scientific Evidence Matters Most to Consumers

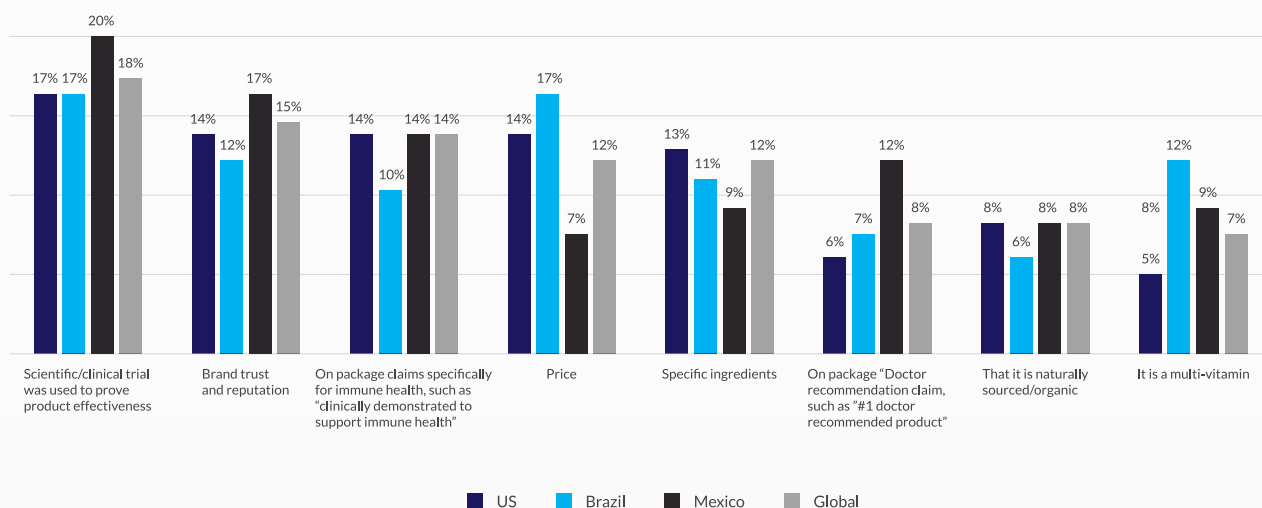
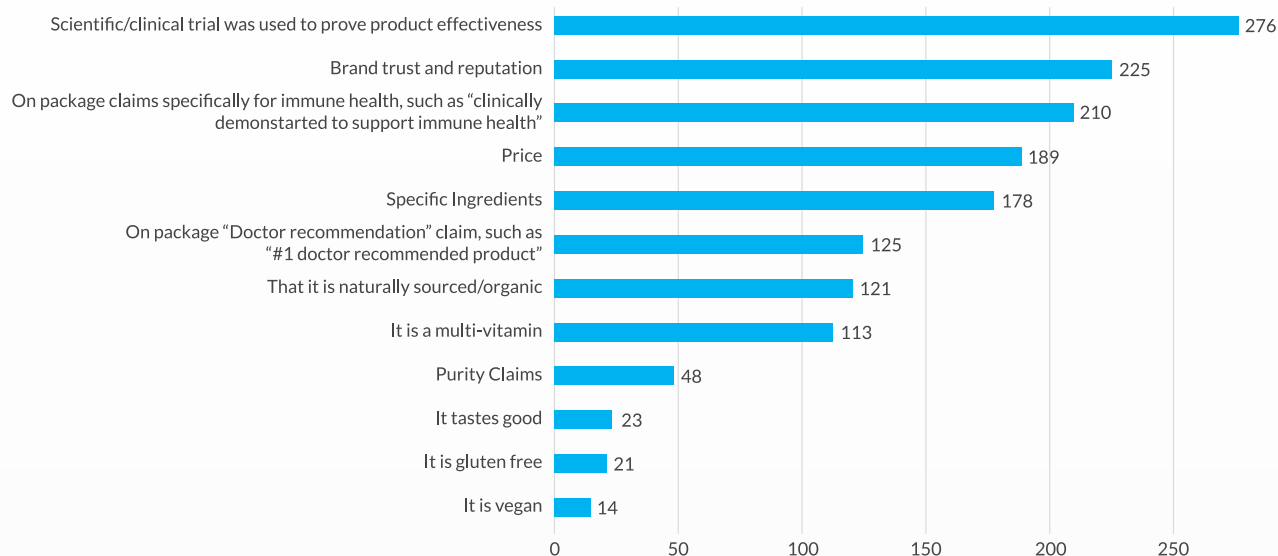
Consumers today have unprecedented access to information and a resulting ability to make better dietary choices. One of the consequences of being better informed is a growing skepticism of unsubstantiated nutraceutical claims in an increasingly saturated market.

In a competitive market, buyers are looking for products that stand out and the way to differentiate is to offer scientific evidence. When asked what was most important to consumers when choosing a dietary supplement, most consumers indicated that they choose products with scientific/clinical trial evidence to prove product effectiveness.

Consumers are right to be skeptical about the under-regulated supplements industry. Not long after COVID-19 emerged, the FDA issued [warning letters](#) to firms for selling fraudulent products with claims that they could prevent, treat, mitigate, diagnose, and even cure COVID. None of these products had evidence to back these claims.



When choosing a dietary supplement for immune support, what is MOST Important to you?



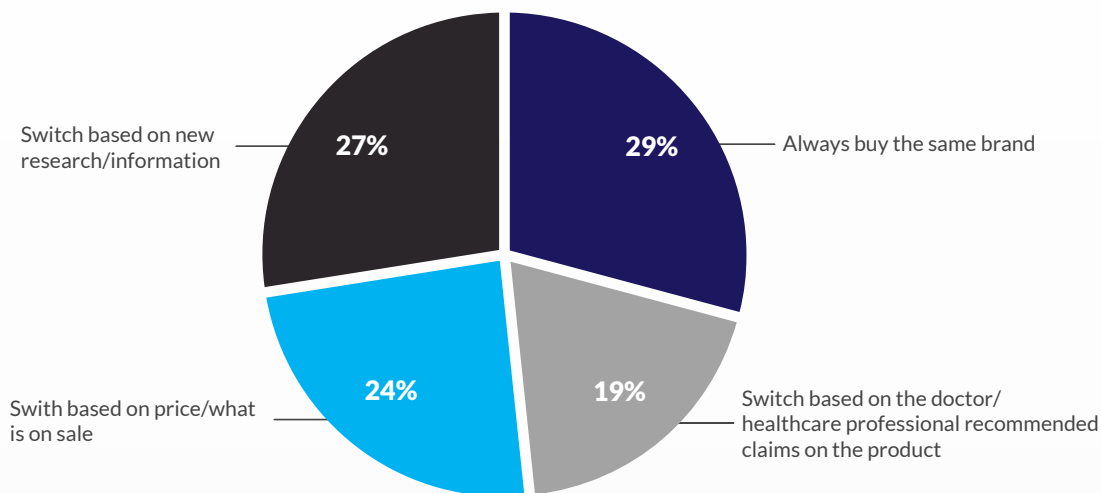
New Scientific Research is the #1 Reason Why U.S. Consumers Will Switch Products

Regional differences do exist with regard to why consumers switch to new products for immune support. Consumers in the U.S. rate new scientific research as their primary reason for switching brands—with a close second being price, then brand loyalty. Switching based on doctor recommendation is the least popular reason in the U.S., with only 7% of consumer choosing this option.

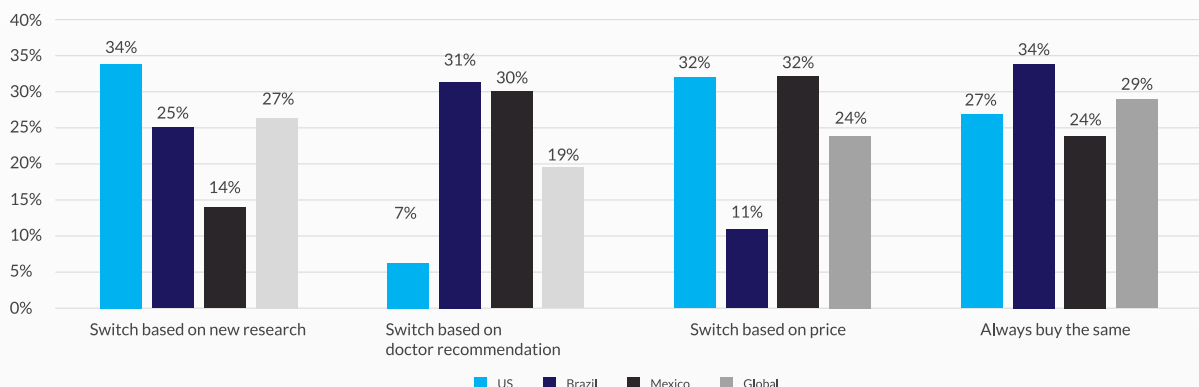
Mexico, on the other hand, values brand loyalty, but a third of the consumers said they would switch based on doctor recommendation. Brazilian consumers are most likely to switch based on price, followed by doctor recommendation.



Regarding your purchase of dietary supplements for immunity do you (N=296);



Regarding your purchase of dietary supplements for immunity do you:



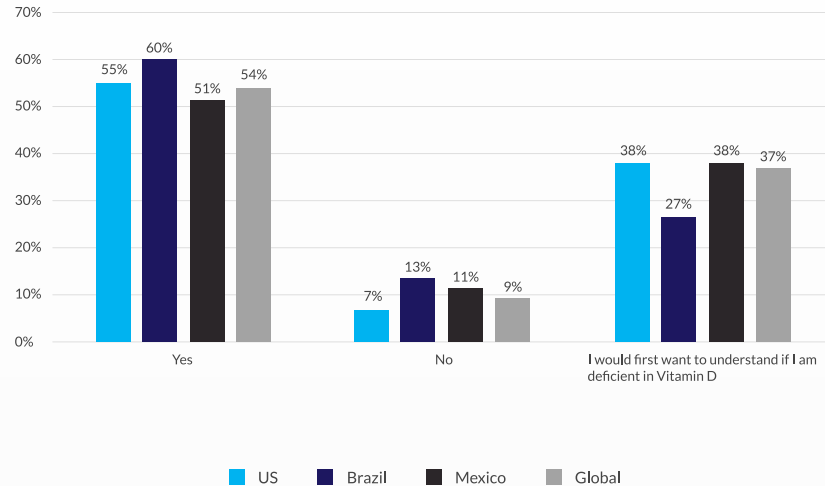
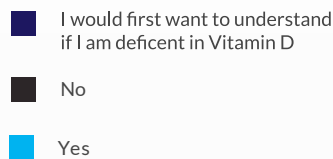
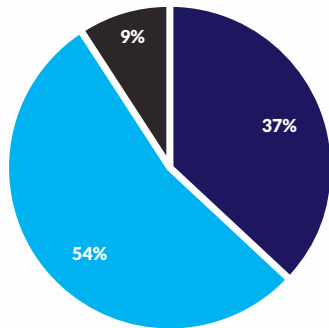
Scientific Evidence Can Cause New Consumers to Enter the Market

Science can apparently convert even the least receptive consumers – those who don't use nutraceuticals. 73% of people who have not purchased a dietary supplement in the past 12 months say they would be encouraged to purchase one for immune health if there was a scientific claim associated with it.

When this same audience is presented with the research surrounding COVID-19 and vitamin D, the majority (54%) said they would be encouraged to take vitamin D for immune support and an additional 37% would be interested if they first knew that they were vitamin D-deficient.



Recent studies suggest people with a deficiency in Vitamin D have increased risk of COVID-19 infection. Would this encourage you to take Vitamin D to support your immune system and defend against COVID-19 (N=334)?



Top 5 Most Popular Ingredients

People also report an interest in specific ingredients, with more than half saying they have changed the ingredients they look for in an immune health supplement. Vitamin D scores second on the list of sought-after ingredients, likely due to studies that show low vitamin D levels are associated with higher risks of contracting COVID-19 or with becoming seriously ill. The top immune boosting choice is a mainstay – vitamin C – with vitamin B, zinc, and probiotics rounding out the list.

Top 5 most popular ingredients:

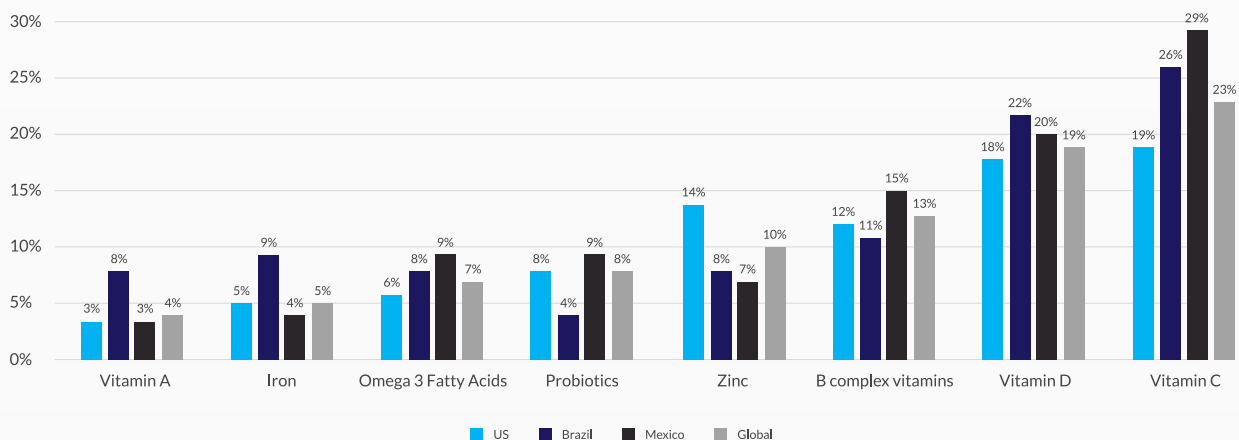
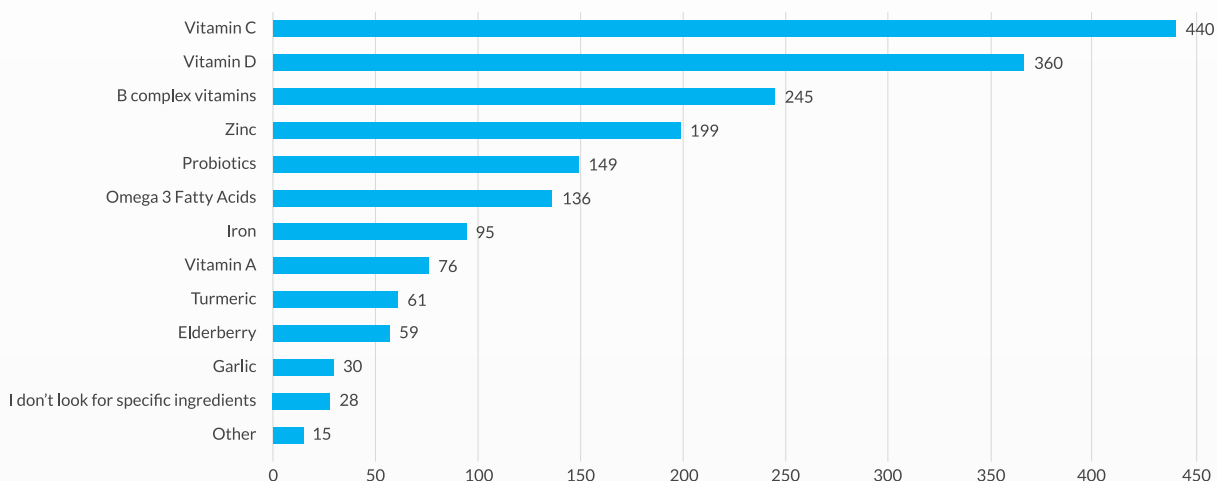
1. Vitamin C
2. Vitamin D
3. B Complex Vitamins
4. Zinc
5. Probiotics



The Continued Rise of Gut Health & Immunity

Consumers are increasingly associating good gut health with immune support. As they strive to build immunity, they are becoming more knowledgeable about how the human microbiome supports the immune system and overall well-being. A survey by DuPont found that probiotic usage has increased **66%** in the United States since the start of the pandemic. In China and Italy, those usage rates are up more than 100%.

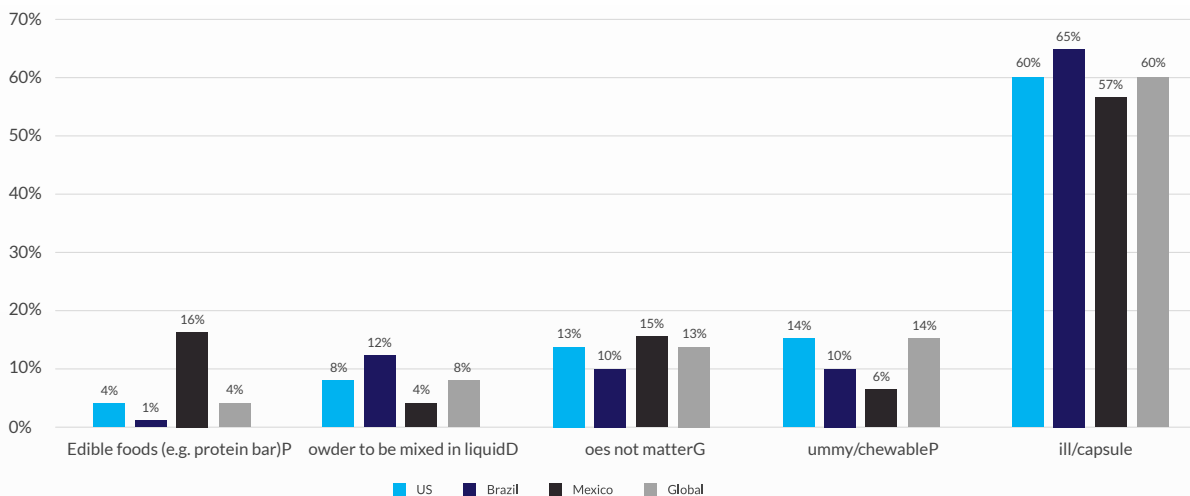
When purchasing a dietary supplement for immune health, which ingredient(s) do you look for?





Pill/capsule is still the preferred form of immune supplements

Despite the innovation in delivery methods for dietary supplements and the explosion of the fortified foods industry, consumers still prefer the traditional pill/capsule form for immune support supplements. This is a consensus held by all three regions and is held by a strong majority.



Where Are Consumers Purchasing Their Immune Support Supplements?

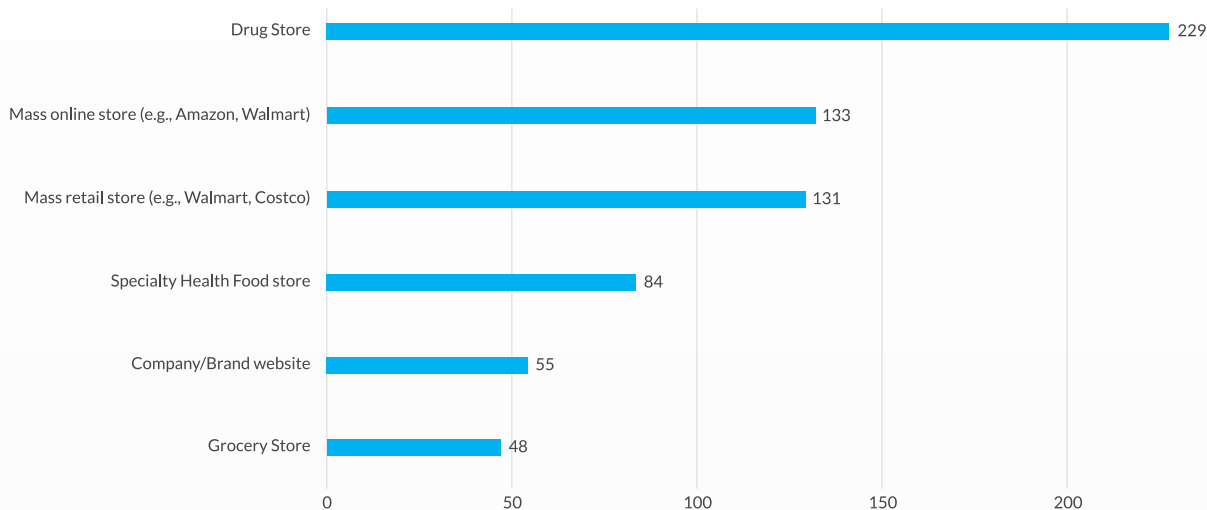
While the majority of consumers in Mexico and Brazil purchase their supplements from drugstores, the US primarily purchase their supplements online from mass-market stores. When averaging the results between all 3 regions, drug stores are the clear winner regarding where consumers most commonly purchase from. But, when looking at the data by region, we see that the U.S. consumer prefers online mass market retails such as Amazon and Walmart.

U.S. consumers split their shopping preferences across multiple channels. While 27% of respondents prefer the online mass market channel, mass retail store and drug store are not far behind at 25% and 21% respectively. Specialty health food stores also had a high percentage (14%) of U.S. consumers votes compared to the other regions. This might suggest U.S. consumers value the convenience of multiple options when deciding where to purchase immune support supplements.

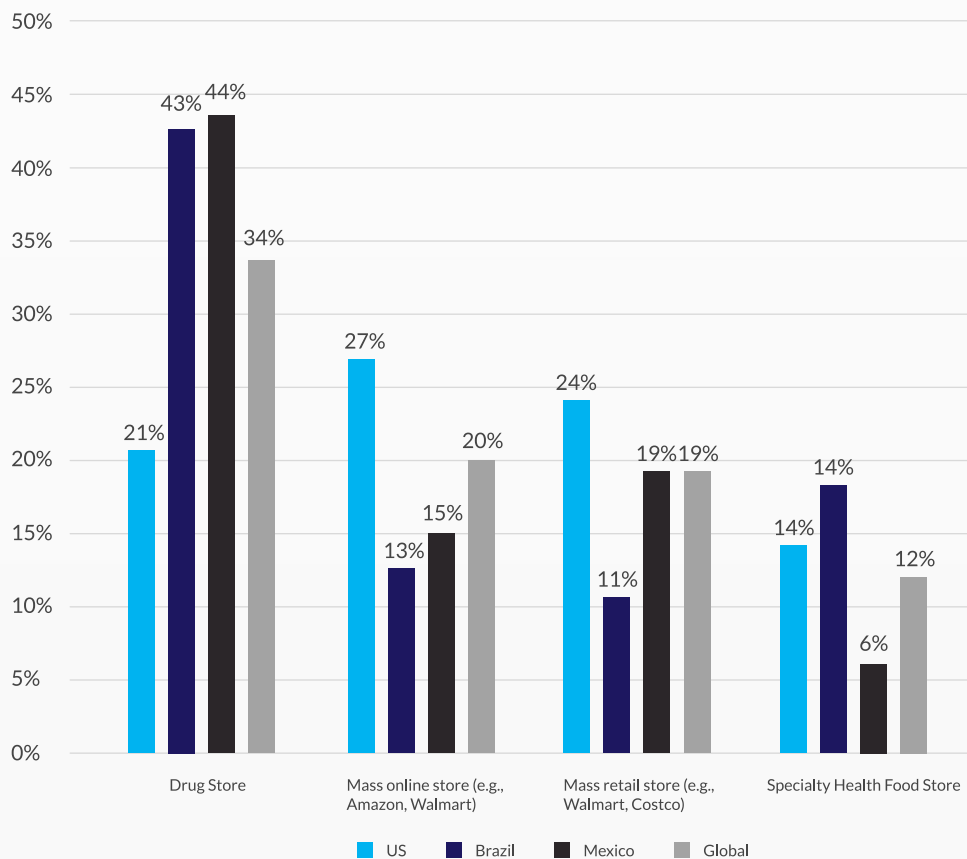


Question: When purchasing a dietary supplement for immune health, where do you most commonly purchase from?

Global Breakdown



Regional Breakdown

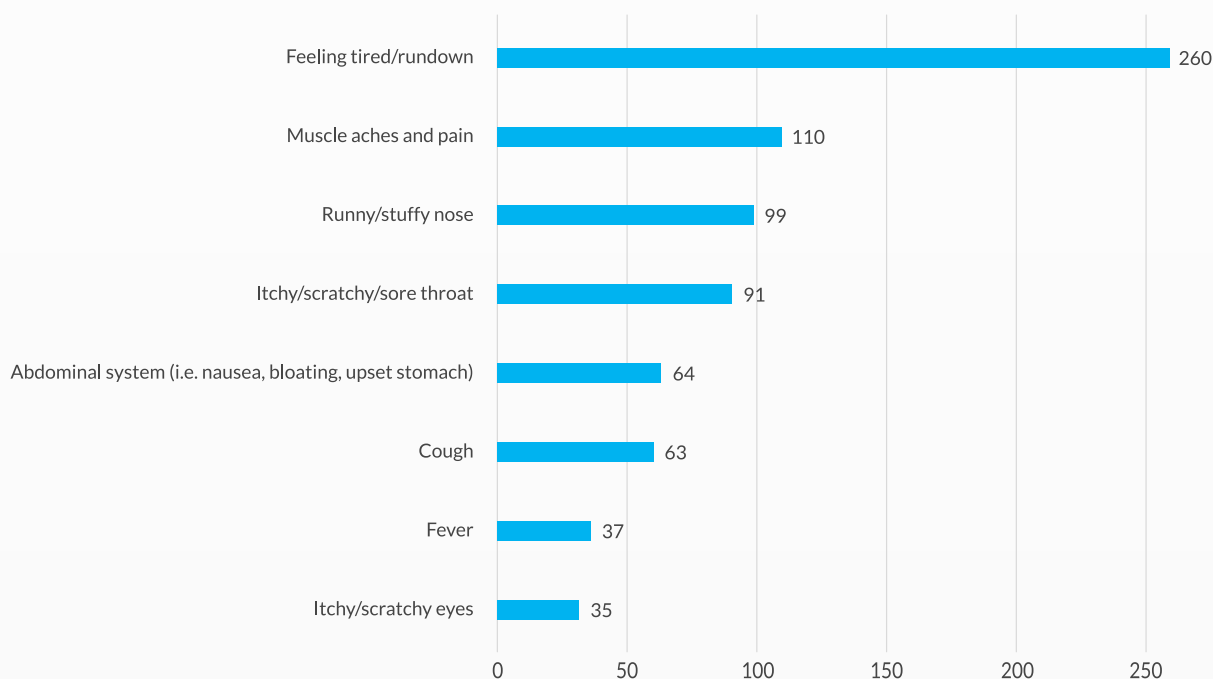




The #1 Trigger for Buying Immune Support Supplements is “Feeling Tired/Rundown”

Consumer across all regions cite feeling tired and rundown as the number one symptom that prompts them to purchase a dietary supplement for immune support. This answer wins by a large majority and may signify consumers are seeking preventive solutions to stave off illness before more major symptoms arise. Brands can better serve consumers by providing products that are designed to support immunity during the critical incubation period.

What symptoms cause you to purchase a dietary supplement for immune support?





SPRIM Global Survey Data Overview				
	Global	MX	BR	US
Feeling tired/run down	1	1	1	1
Muscle aches and pain	2	2	4	5
Runny/stuffy nose	3	3	3	2
Itchy/scratchy/sore throat	4	5	2	4
Abdominal system (i.e. nausea, bloating, upset stomach)	5	4	6	8
Cough	6	6	5	3
Fever	7	8	7	7
Itchy/scratchy eyes	8	7	8	6

Conclusion

Immune health continues to be top of mind for consumers, and the demand for immune support supplements follows naturally from this. But, in a saturated market consumers are becoming more discerning with their purchasing power.

The data reveals considerable opportunity for dietary supplement brands within the immune health category if they weed out the fiction and stick to the facts. Evidence of efficacy can convince doctors to recommend, supplement-takers to switch brands, and can also incite supplement-skeptics to enter the market.

These insights paint a new landscape of the immune support supplement category in the post-COVID era. Strong interest in the category is accompanied by increasing expectations for immune support supplement evidence. The dietary supplement industry is in a prime position to capitalize on these shifts in consumer demand if it can keep up with these expectations.



[Sprim.com](https://prim.com)