

The Immunity Report

Volume 1 | October 2021

Dietary Supplements Edition

↑
'PILL
FATIGUE'
INCREASED

↑
IMMUNITY
HEALTH AWARENESS
HIGH

↑
EXERCISE
10 HOURS
PER WEEK



At DSM, we see consumers differently

We understand their ever-evolving needs. Immunity for them is more than a label on a shelf, it's a product with real purpose. And we are the partner to help you create it.

Delve into the world of immunity with the **DSM Immunity Report** – your data-driven guide to understanding this evolving space.

And discover how we're optimizing our dietary supplements portfolio to deliver the most relevant solutions today, along with cultivating a vision for the future, so we can help answer the needs of tomorrow's consumer. Because where others see products, we see purpose.



Click play on the screen to watch our introduction on YouTube.



The key trends

TREND 1 *Higher health awareness*

Covid-19 has changed consumer attitudes towards health and immunity forever. People have become less confident in their own immunity and more aware of health risks, from this pandemic and others in the future. If they started to take supplements in the wake of Covid-19, most plan to continue in the long term. To support them effectively you need to be there and be trusted, and be able to evolve your products and services in pace with our changing world.

TREND 2 *Prevention over cure*

Covid-19 has also led to consumers actively seeking ways to support their immunity to prevent getting ill in the first place. They're also looking at their health and immunity from a holistic point of view. They're much better informed about the impact stress and mental health can have, for example. This creates significant opportunities to connect your products with consumer needs beyond the traditional physical health spaces.

TREND 3 *Modern habits*

As daily routines were overturned during the pandemic, consumers found it more challenging to stick to habits like taking supplements. Now, as restrictions are lifted, they're seeking ways to make life more convenient for them. Rather than having to remember to take a pill at the right time, they want lifestyle-friendly ways to take supplements. Your products can slot easily into their new lives, if they're designed for their new lives.

TREND 4 *Coming back to nature*

Post-pandemic, people are craving connection with nature and there's renewed focus on sustainability. While they still want scientific rigour, most believe all-natural products are better. And, after 18 months of consistently sterilising homes and hands, there's more interest in how biodiversity and exposure to dirt helps gut health and immunity. With consumers being led by their values as well as health concerns, success lies in marrying the two.

TREND 5 *Immunity in the digital era*

Wider adoption of digital channels over the last 18 months, coupled with the global focus on immunity, has created opportunities for brands to connect with consumers who are readily researching and buying supplements online. Given the huge amount of choice now available to them, this informed consumer is seeking more personalised products and services that suit their lifestyles, which can evolve with their needs over time.

Executive summary

Covid-19 has transformed consumer attitudes towards health and immunity. As we have become more health conscious and adopted new behaviours, our relationships with our bodies have evolved.

The way we think about and approach health has changed. From masks, handwashing and vaccines, to diets, self-care and exercise, we've all been trying to prevent illness from happening in the first place rather than relying on a cure.



We consider focused immunity support in certain situations, such as when we feel a cold coming on or when we plan on traveling. But we are also becoming more aware of the fact that immunity is a continuous effort and lifetime goal.

After spending so much time indoors and behind screens, we've developed a new appreciation for nature. Natural products have become more important. When it comes to supplements, many of us are looking for alternative ways to take them. 'Pill fatigue' has led to new formats, like gummies, shots and stick packs, that fit our modern, day-to-day approach to staying healthy and taking supplements.

We've had to adapt to new routines and this has impacted all areas of our lives, from the social side to the way we travel. It's also shaken up the way we take supplements, with food and drink with an immunity claim becoming increasingly popular globally.

In this changing environment, DSM has uncovered five key trends that will help you navigate the evolving immunity market, spot opportunities for your business and help you deliver products that stand out on store shelves.

TREND

Higher health awareness

There are signs that Covid-19 will have a long term impact on health consciousness. Not only has our general knowledge about healthcare increased over the past 18 months, but many people are preparing themselves for the possibility of another pandemic in the future.

70% of people believe consumer attitudes towards buying health and wellness related products will have a mid to permanent change.²

People are more concerned about immune health now. **65% consumers are more conscious of immunity since Covid-19.³** People have become less confident in their own immunity and more aware of health risks. Of vitamins, minerals and supplements users in the UK, **36% use the products to strengthen their immune system in response to the threat of Covid-19.⁴**



When it comes to immune health, people are taking a long-term view. Even once they have been vaccinated, **only 5% of consumers say they will stop taking supplements.¹** Crucially, it's not just their own health that consumers have become more concerned about. **82% of people worried about Covid-19 say they are also fearful about the health of loved ones.³** One UK survey found that **67% of people are more concerned about their family's health than their own.⁵**

Opportunities for your business

What if you could keep up with consumer concerns by adapting your products faster?

What if you could talk about health in a way that eased customers' anxieties?

What if you had a product to support consumers and their families or communities?

TREND 2

Prevention over cure

Consumers are looking for new products to support immunity and prevent illness, rather than just cure it. 67% of global consumers are interested in products that boost immune health, even if they have no symptoms.

These findings are reflective of a broader shift, where consumers are moving towards a more holistic view of healthcare. For example, outside of immunity, consumers are also worried about mood, sleep, stress, attention and memory.

Three in 10 adults are more aware of their mental health needs because of Covid-19.⁸



Opportunities for your business

What if a holistic understanding of consumers' needs led your consumer journey?

What if you could marry your scientific expertise with a holistic view of health?

What if you could provide a portfolio of different products that support a holistic immunity regime?



TREND 3

Modern habits

Developing a holistic and prevention-focused immunity regime relies on having a routine, and these have been overturned during the pandemic. Similarly, to get the best out of taking supplements it needs to become a daily habit.

As restrictions lift, we're having to rebuild our lives, daily routines and habits. This comes as people are increasingly experiencing 'pill fatigue' and looking for new ways to take supplements. In fact, **72% of global consumers prefer to consume immunity supporting products in food and drink form.**⁵ This market has been growing for a few years: between 2016 and 2020, food and drink products with an immunity claim increased by 22% globally.⁹



Opportunities for your business

What if you offered expert formulas in more interesting formats, like stick packs or gummies?

What if you delivered solutions that fitted seamlessly into modern lives?

What if you could create products and data-driven diagnostic tools to help people form new habits?





Coming back to nature

People feel more connected to getting nutrients through natural ingredients in their food. While they still want their diet to be backed by science, 73% of consumers believe that 100% natural products are better for them.⁷

Having spent the majority of the past 18 months in sterile and indoor environments, people are craving nature and to reconnect with the earth. At the same time, consumers have become more interested in how biodiversity and exposure to dirt helps gut health and immunity. In fact, 70-80% of our immune cells live in our gut. This means that supporting gut health with exposure to 'good bacteria' through dirt and soil is an important part of building immunity.

Meanwhile, concerns about the environment are also driving consumers to make more sustainable choices. **45% of US adults wanting to see more plant-based versions of vitamins, minerals and supplements.**⁴



Opportunities for your business

People's values are starting to play a role in every purchase decision. What if you could provide supplements that fit the needs of sustainability-conscious consumers?

Consumers today want natural ingredients and science. How can you balance the two?

What if your products could deliver on consumers' new understanding of gut health?



5 TREND

Immunity in the digital era

In the last 18 months, consumers have turned to eCommerce for more of their lifestyle needs. With increased global focus on immunity, this shift has impacted how they buy supplements; **40% now buy them online.**¹¹

This has the allure of convenience, choice and the chance to research. Consumers are looking online to find the right information on the role of nutrition and other factors on immunity. **With 26% of UK users of vitamins, minerals and supplements wishing to see more personalized products,**⁴ the digital space also offers consumers more opportunities to tailor products and services, versus the broad support they might receive in-store. It can ease access to testing, for example, which consumers are willing to do – 27% of consumers who have taken action to personalize their nutrition have had a blood test⁷ and 76% of global consumers who find nutrition-genetic testing appealing would do it to improve immunity.⁷

In the digital space, supplements can also be more easily tailored to consumers' lives and habits through online subscription services, **which would interest 62% of nutritional supplements users globally.**¹⁰ These can be based on demographic, lifestyle or season, for example. As well as tailored convenience for the consumer through immunity products suited to them, subscription services can help brands keep connected with them beyond delivery and learn more about their needs over time.



Opportunities for your business

How can you answer consumer needs on personalization and subscription with your products?

How could you improve consumer awareness and confidence on the role of nutrition in immunity through digital channels?

How can you create a long-term relationship with your customers by being able to offer new products as their needs change?



Your end-to-end partner

Where others see products, we see purpose. That's because we understand consumers' shifting needs and how supplements fit into their broader healthcare regimes.

At DSM we know purpose can be the difference between just driving consumer interest and differentiating your product on the store shelf. That's why we pour all our curiosity, insights, and innovation into every product we help develop. This takes more than ingredients. It takes a partner.

When you partner with DSM on immunity health benefit solutions, you get an innovative, end-to-end partner, inspired by the end consumers' most pivotal health needs to deliver your next product with purpose.

We combine science-backed expertise and deep consumer insights with institutional knowledge about trends, market opportunities, and format and applications to deliver immunity-focused products that cause consumers to view them as a health priority. It's born of an innovative spirit that not only strives to serve their wants today, but their unmet needs tomorrow.

Our end-to-end services can support you at every stage of product development, from R&D to marketing and regulation. By partnering with us, you can reach your customers with products that matter to them and serve a range of different consumer needs. We also provide customized solutions, including pre-mix and market ready products to help you get to market faster.



Ready to connect with an immunity expert? Click here.



*Together we can
do amazing things
for immunity*

Partner with DSM



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