



HOW SUPPLEMENT SHOPPERS VIEW  
IMMUNE HEALTH AND THE MICROBIOME

# Exploring the Evolving Consumer Attitudes About Immunity Support

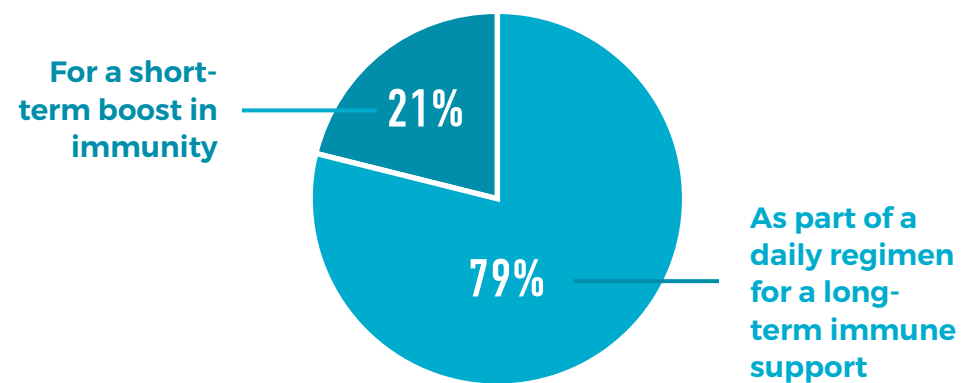


As post-pandemic life returns to normal for consumers, demand for immunity supplements remains strong. Two-out-of-five (40%) report taking supplements to support immunity in the past 12 months, according to a recent survey by Kyowa Hakko of 503 US supplement shoppers. Among those who take immunity supplements, 79% do so as part of their daily regimen for long-term immune support.

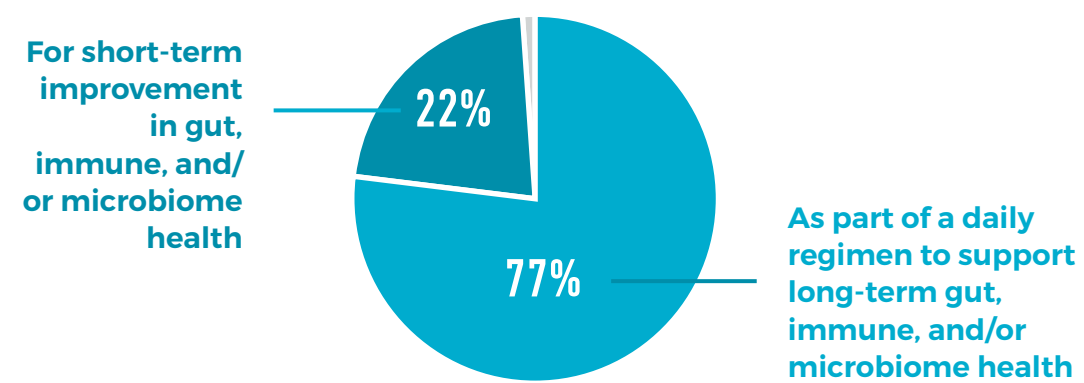
In tandem, supplement consumers are also seeking out gut health support. Seven-in-10 (70%) supplement consumers agree that the health of their microbiome is important to their overall health. And in the past year, about one-third (33%) have used a supplement for digestion or regularity. Among those who take these, 77% do so as part of their daily regimen for long-term health and wellness.



**Which best describes your reasons for taking immunity supplements?**



**Which best describes how you take supplements to support gut and microbiome health?**





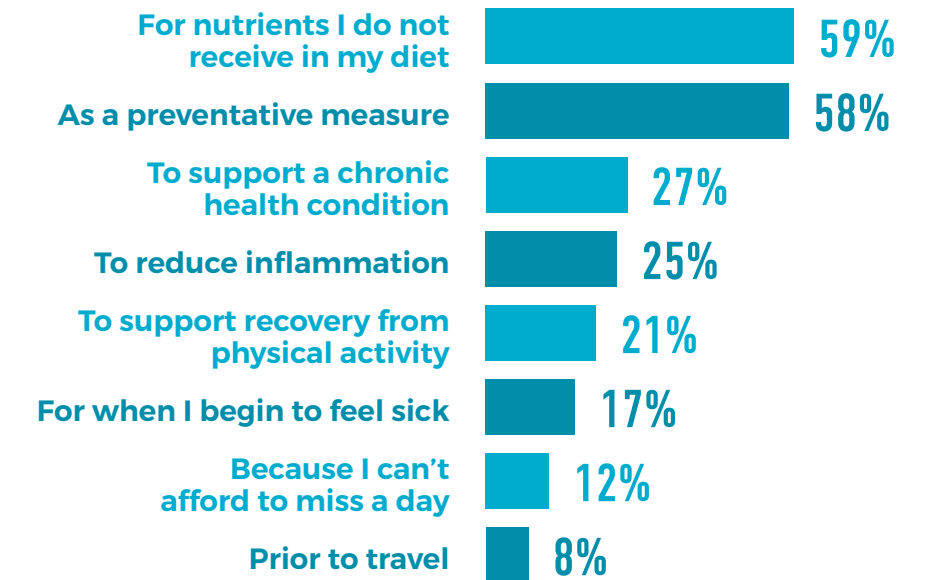
## Motivating Attributes

According to the survey, supplement consumers are likely to take a supplement as a preventative measure or for nutrients not received via diet. A significant number are also motivated to take supplements to reduce inflammation or to support recovery from physical activity. These findings point to opportunities for brands to offer prevention/nutrition-oriented applications for daily, long-term use.

Consumers look for certain attributes when considering a dietary supplement. The data suggest that most supplement shoppers place high importance on specific benefits, ease of use, clinical studies, and lack of artificial ingredients. Manufacturers of immune support applications should carefully and consistently communicate what the active ingredients are, how they work, and the science behind them.



Which of the following best describe what motivates you to take dietary supplements?



Which of the following is most important to you when considering a dietary supplement?



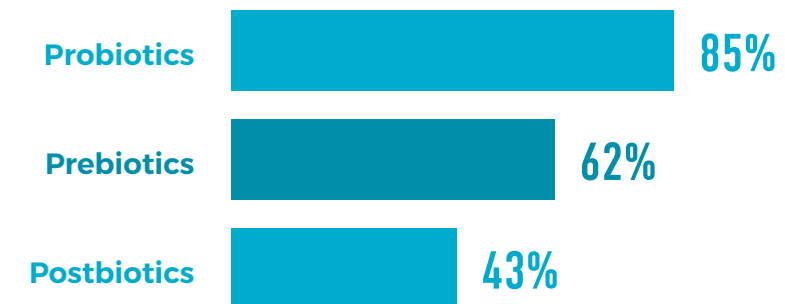
# Familiarity with Probiotics, Prebiotics, and Postbiotics

Overall, awareness of probiotics is high, with more than four-out-of-five (85%) supplement consumers reporting being familiar with the term. Similarly, 81% of those surveyed agreed that probiotics are effective for supporting immune health. When it comes to prebiotics, a smaller but significant percentage said they are familiar with the term (62%), with nearly two-thirds (65%) believing prebiotics offer effective immunity support.

About three-out-of-five (62%) report having purchased a probiotic supplement in the past 12 months. A smaller proportion (17%) said they have purchased postbiotics in the past year. Interestingly, nearly half (49%) believe postbiotics are effective for supporting immune health. Although the survey shows that public awareness about postbiotics is relatively lower than pro- and prebiotics, the data suggest that with effective messaging, many supplement consumers are likely to make similar general associations between postbiotics and immunity.



How familiar are you with the following terms?



I think \_\_\_\_\_ are effective at supporting immune health.





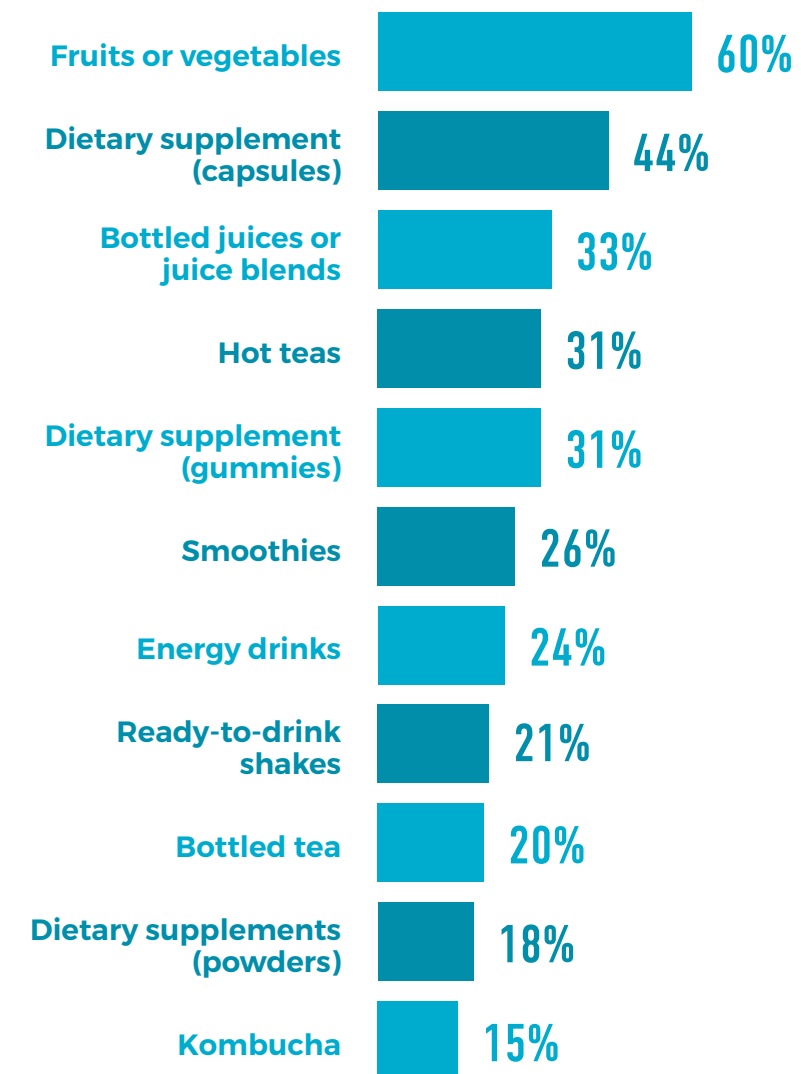
# Formats for Immune Health Support

For most supplement consumers, dietary nutrition is the best medicine for boosting immune health. Three-in-five (60%) of those surveyed said they have purchased fruits or vegetables in the past six months to proactively immune health support. Similarly, two-in-five (40%) said they purchased fruits or vegetables in response to getting sick.

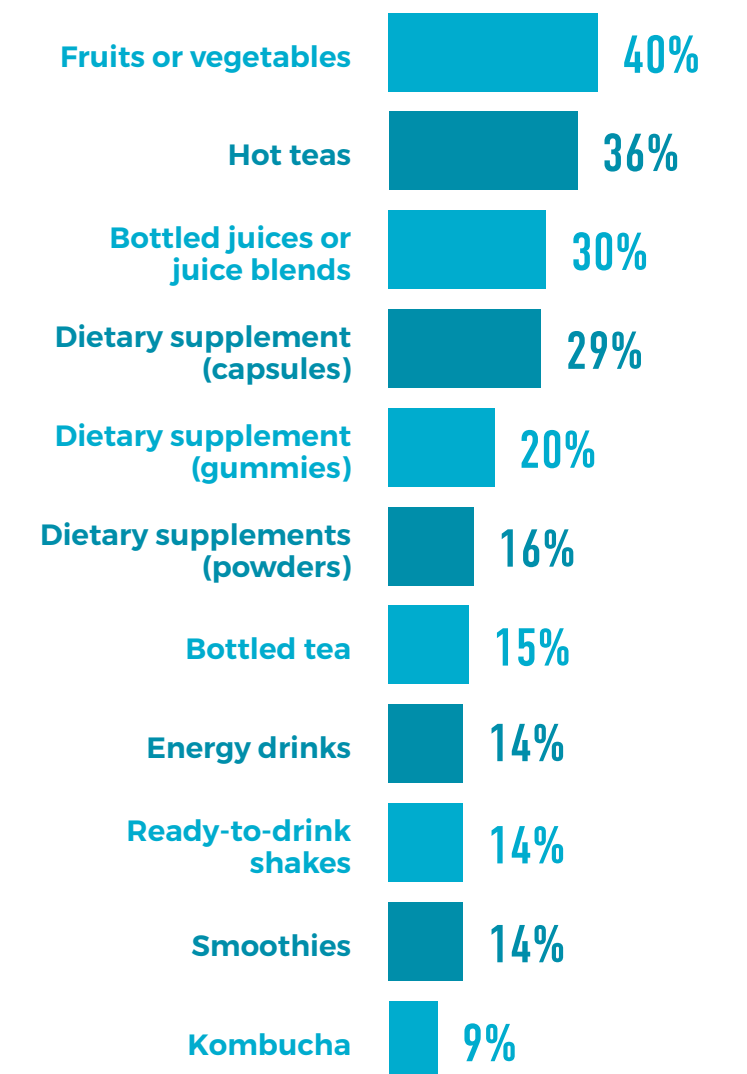
Although dietary supplements in capsules and gummies remain popular formats for supporting immune health, the survey data point to growth opportunities in immune-boosting beverage applications. Many supplement consumers reported purchases of bottled juices, teas, and smoothies both as proactive immunity support and in response to getting sick. These formats are easily combined with immunity-supporting ingredients and immunity-forward flavors, like elderberry and citrus, to amplify the appeal to immune health support.



Which of the following have you purchased in the past six months to proactively support immune health?



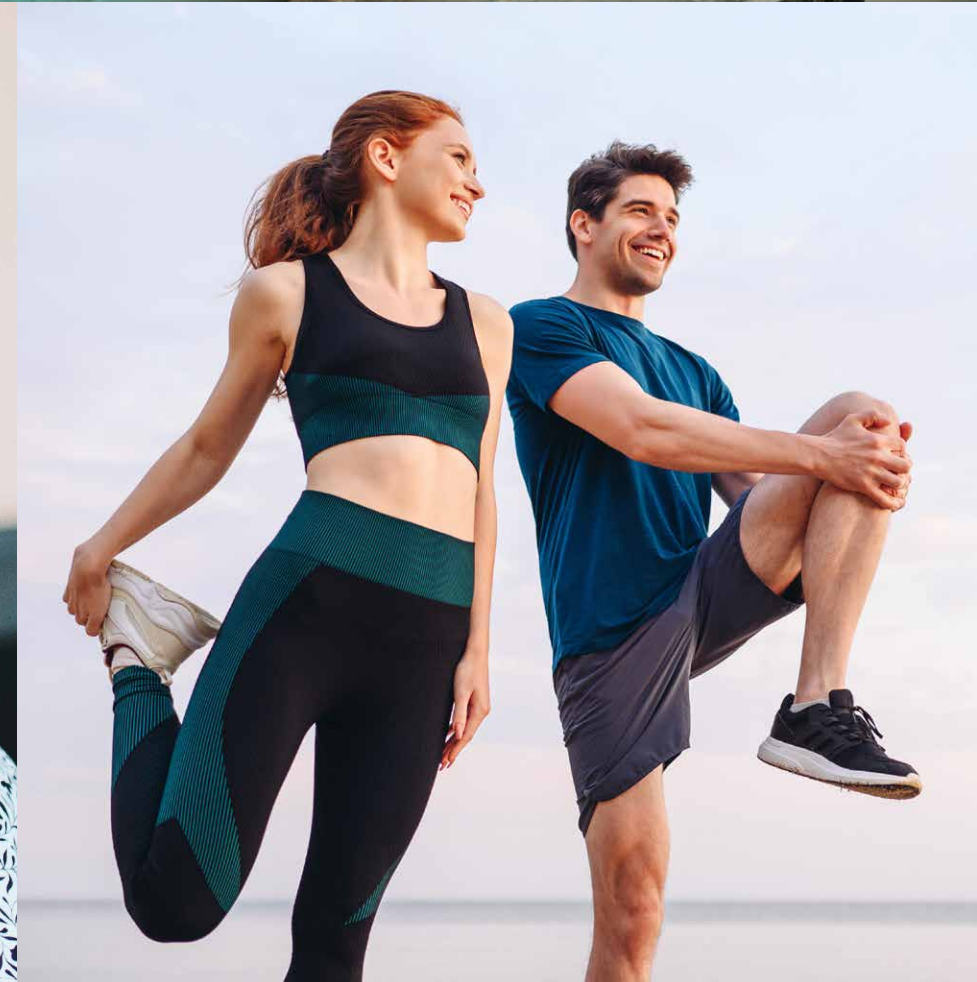
Which of the following have you purchased in response to getting sick in the past six months?



# Bridging Gut and Immune Health

Most of today's supplement consumers actively try to maintain optimal health. More than four-out-of-five (82%) said they look for ways to boost their immunity, including diet, activity, and supplements. Furthermore, 81% also said they look for ways to boost their digestive health, with diet, activity, and supplements. Brands can cast a wide net by helping consumers make connections between immunity and the microbiome.

Supplement consumers said they are likely to look for information on foods and ingredients that affect their health. Many also report researching alternative medicine or turning to online searches or friends and family for information about dietary supplements. Importantly, respondents noted they are most likely to trust the personal nutrition recommendations of authoritative sources, such as a physician, nutritionist or trainer, or clinical studies.





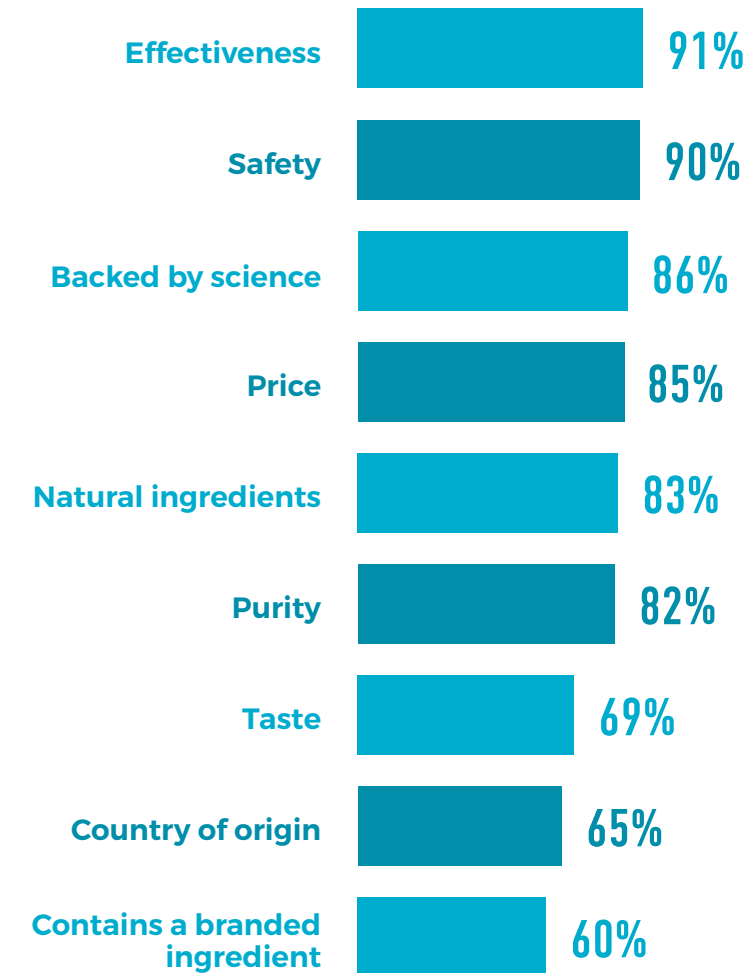
# Application Insights

For both supplements and beverages to support immune health, consumers prioritize safety and effectiveness. More than four-out-of-five (86%) respondents said it is important that dietary supplements to support immune health are backed by science. When it comes to immune-boosting beverages, taste takes a higher priority. Those surveyed also indicated that purity and natural ingredients are important when looking for immune support in either format.

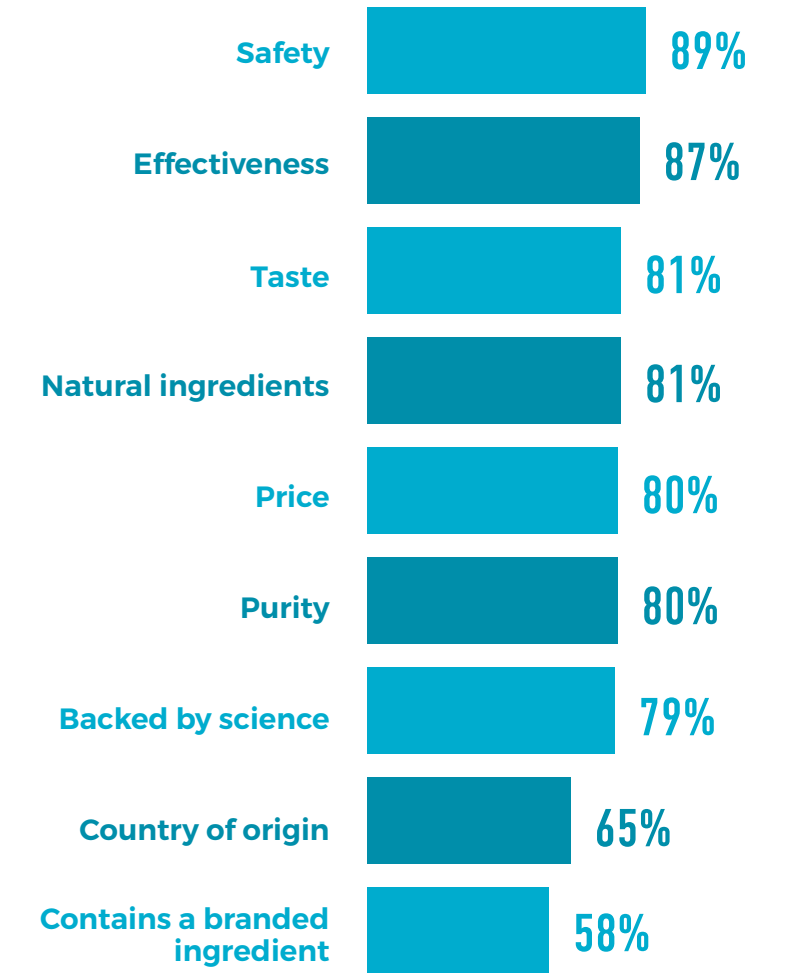
Opportunities exist to bring to market new immune support applications, especially in beverage formats. Over two-thirds (68%) of supplement consumers said they are satisfied with the current beverages to support immune health available to them. Similarly, 63% said they are likely to purchase them in the next three months. This leaves nearly one-third of supplement consumers in the US underserved and unsatisfied with the current market for immune-boosting drinks.



Rate the extent to which you agree that the following are important when looking for a dietary supplement to support immune health.



Rate the extent to which you agree that the following are important when looking for a beverage to support immune health.



# INTERESTED IN

**IMMUSE™**

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IMMUSE™ by Kyowa Hakko is a clinically researched postbiotic ingredient for supporting immune health. Backed by 30 studies, IMMUSE™ works by activating immune cells called pDCs (plasmacytoid dendritic cells). Activated pDCs stimulate interferon (IFN-α) production, which is critical to optimal function of the immune system.

To manufacture IMMUSE™, a unique, patented strain of lactic acid-producing bacteria (*Lactococcus lactis*) is cultivated, heat-treated and made available to improve the ability of product manufacturers to meet consumer demand for better immune support products. Since the postbiotic does not require refrigeration or special handling, it is easy to ship, store, and integrate into formulations.

IMMUSE™ received the Frost & Sullivan 2021 North American New Product Innovator Award for its clinical research and its high standards for manufacturing.

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**INTERESTED IN IMMUSE™?**  
**VISIT OUR WEBSITE TO FIND OUT MORE.**

These statements have not been evaluated by the Food and Drug Administration. This product is not intended to diagnose, treat, cure, or prevent any disease.