

2021

HEALTH OF THE NATION SURVEY



LOCKDOWN
FOCUS

Introduction:

Executive Director, Graham Keen

“We’re very happy to be reporting that record numbers of people are now taking food supplements. I think we all knew that this is happening, but it’s great to have it confirmed so definitively by this survey. It also gave us a timely opportunity to see how the pandemic, and the series of lockdowns that resulted, has influenced consumers to take proactive steps to help themselves to be healthier.

This data from our latest ‘*Health of the Nation 2021; Lockdown Focus*’ survey has found that nearly 20 million people in the UK are now using supplements on a daily basis, an increase of nearly 20% since the last survey in 2019.

Over 70% of adults are now taking a food supplement, with 1 in 3 claiming to have introduced a supplement as a result of the COVID pandemic. Of these new supplements taken, vitamin D was the most popular, followed by vitamin C. There has also been a shift among the younger demographic, with 77% of 18-24 year-olds now consuming supplements.

Numerous studies since lockdown have highlighted an increased consumer interest in health and wellness, and this was reflected in this survey. 42% of people surveyed said that their food supplement purchases were most influenced by personal research, and when they do seek out information, 88% of people stated that they find it easy to find and research the right information on supplements. Notably, 40% stated that information about immunity had influenced their choice of food supplements.

The findings from this latest survey confirm that the HFMA’s member companies, and the wider natural health industry, continue to play a vital role in helping our nation to be healthier. And our products have probably never been held in more esteem by consumers, and perhaps more understood by Government and Regulators, than they are right now.”



This research was independently conducted by **3Gem** on behalf of the **Health Food Manufacturers’ Association** with 10,000 UK adults, **29th Nov to 9th Dec 2020.**



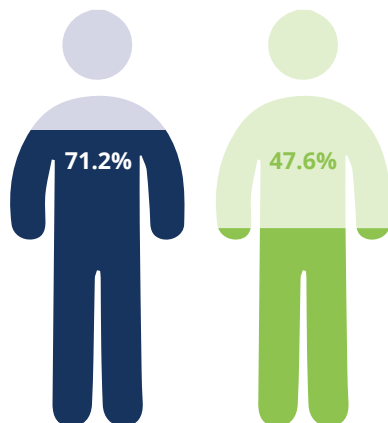
Food Supplement trends:

71.2%

of the UK adult population are now taking food supplements.

47.6%

Almost half are taking them on a daily basis



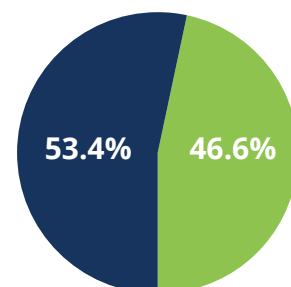
Of those taking supplements on a daily basis,

53.4%

are women, and

46.6%

are men.



16.5 Million

Oct 2019

20 Million

Dec 2020

Almost **20 million** people now taking supplements on a daily basis.

Up 19% on the 2019 survey.

Daily supplement consumption:

Age differences

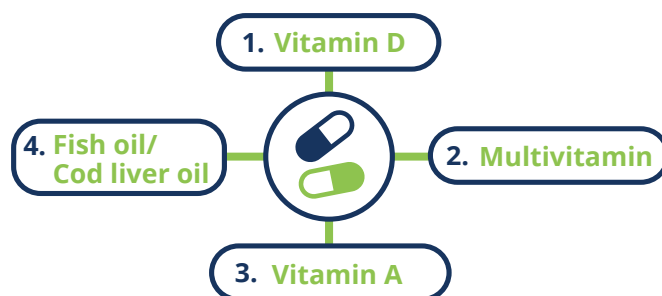
Over 65s: **75.3%**



55-64: **68.0%**

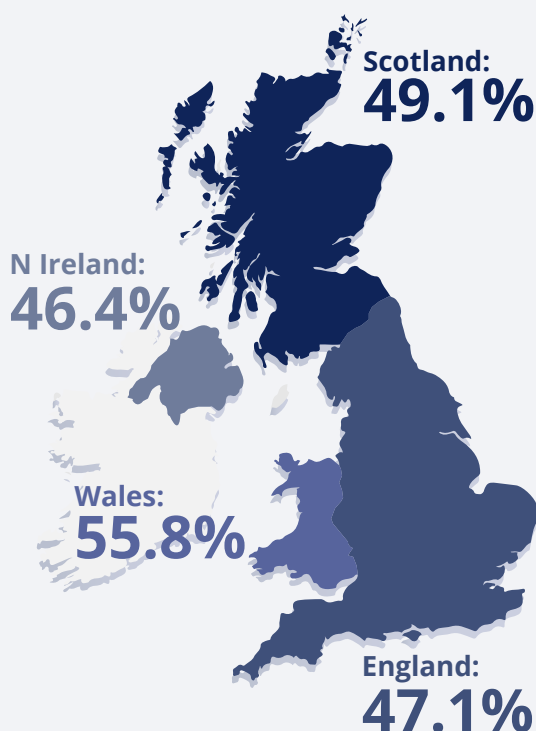


The four most popular food supplements:



The UK health Landscape:

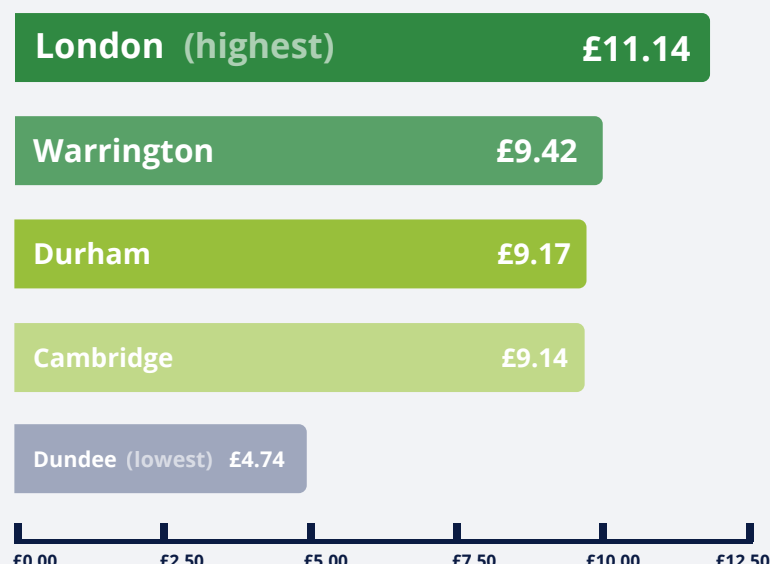
Of those taking supplements on a daily basis, the comparative numbers are:



Health has 'declined' since October 2019

Lisburn	50.0%
Dudley	48.4%
Newport	45.1%
Edinburgh	36.3%
Coventry	36.3%
Bristol	36.1%
Derby	35.2%
Sheffield	34.9%
Middlesbrough	34.7%
Cardiff	34.5%

Spend on 'keeping healthy': town/city



People who self-categorised as 'healthy'

MOST

London 65.7%
Southampton 61.8%
Northampton 60.6%
Coventry 60.0%

LEAST

Belfast 44.2%
Wrexham 41.4%

People who intend to take more supplements as they get older

80.6%
Carlisle

57.9%
Chelmsford

Consumer perception: Health, diet and information

Feeling healthy

More men, than women felt 'very' or 'quite' healthy at

57.8%

compared to women at

53.2%

Those aged 18-24 felt 'healthiest'

65.6%

The 25s to 34s, who had the highest average weekly spend on health, at £10.31, followed at

63.7%

An investment in good health



30%
Food
Supplements



22%
Gyms



19%
Organic
food

Supplements: Part of personal health strategies

Planning to take more supplements as they get older:

All

72%

Women

74%

Men

70%

The average weekly spend on 'keeping healthy' is £8.63 for men and £7.63 for women.

The national average is £8.15, down from £8.82 in the 2019 survey.

England	£8.30
N Ireland	£8.14
Wales	£7.29
Scotland	£6.96



LOCKDOWN FOCUS

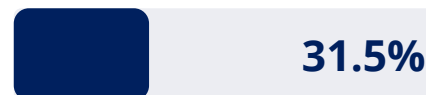
Consumer Drivers:

Consumer reasons for taking food supplements:

60.7%	'for general health and wellness'
24.3%	'for vitamin deficiency'
20.5%	'for joint health'
20.4%	'to optimise health'

People's 'general health'

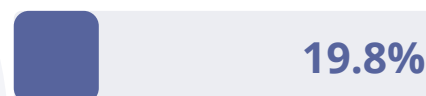
Felt this had worsened



'Stayed about the same'



Improved



% who felt health had declined, gender and ages:

Women:	34.1%	25-34s:	38.8%
Men:	28.2%	Over 65s:	7.1%

Influencers of supplement purchase

Shifting trends include personal research driving more supplement purchases, and a notable reduction in influence from family and friends.

Personal research	41.6%
Expert recommendation	18.8%
Family and friends	14.2%
Social Media, including influencers	9.4%
Newspaper/magazine	8.0%

88.1 %

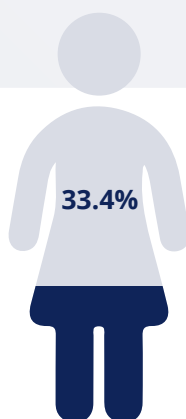
find it easy to find and research the right information on supplements.

Nearly a third 30.7%, have started taking supplements in the last year.

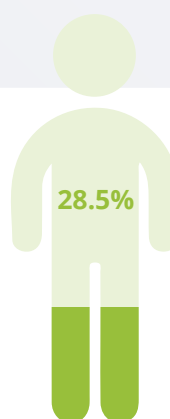
- Women 33.4%
- Men 28.5%

Within the 18-24 age group, 39.2% are new supplement users.

Women



Men



81.2 %

of 25 to 34 year olds are planning to increase their consumption of food supplements.

New trends, new insight:



Nutrition and immunity: Key to supplement choice

39.8% of those questioned stated that information about nutrition and immunity had influenced their choice of food supplements, especially in the **18-24 age group (53.2%)** and **25-34 age group (48.8%)**.



77% of 18-24 year olds are now consuming food supplements.



19.7%

state that they are taking more supplements to support their immune system. This was higher for women (21.7%), and for the over 65s (34.2%).



Taken for the first time, since the pandemic began:

Vitamin D

63.3%

Vitamin C

39.3%

Is diet adequate?

More than one third, 37.2% feel that they don't get the right amount of vitamins and minerals through their daily diet

(compared to 35.2% in 2019).

Taking more supplements than before the pandemic started:

23.9% of all questioned
Age 25-34 **28.8%**

Dialogue and industry relevance:

"The pandemic has had a positive effect on the independent health trade. Independent retailers report that working from home, and lockdown geographical restrictions, have led consumers to reconnect with local businesses, especially health food stores which sell artisan, specialist and innovative products, not to mention the well informed and expert advice which is at the heart of health food retailing. Coverage on vitamin D has driven demand for supplements, plus other key immune health nutrients, with many seeking out information about supplementation for the first time. These new survey insights show that our industry is in a favourable position, having overcome challenges throughout the pandemic. This is important data, as it allows us all to factually reflect on changes in consumer behaviours, and how our business models might respond to this."

**Tom Moses, Managing Director,
Natural Trade Brokers**

"Throughout the pandemic we have seen significant growth in online sales as people are reducing trips to bricks and mortar outlets during the pandemic generally and more specifically during lockdown. There are two notable observations; the increased impact of stress and sleep problems over the past year and the help herbal medicines can offer in this area, and also reduced incidence of colds and flu, with increased distancing, regular hand washing and the use of face masks. We have made positive adjustments to our usual business approach, and data such as the Health of the Nation survey is helpful in guiding this."

Janet Groves, Chairman, G R Lane Health Products

"The Health of the Nation Survey 2021: Lockdown Focus provides unique insights into how consumer behaviours and spending on natural healthcare products have changed directly as a result of the pandemic, and these survey results are able to quantitatively demonstrate positive changes to consumer purchasing. Nearly a third of consumers have started taking supplements in the past year, and 77% of 18-24 year olds are now consuming supplements, discovering the role that supplements can play in supporting physical and mental wellbeing."

With many retail outlets closed during lockdown, consumers' expectations of online purchases have moved on, with next day delivery now being the norm, with the extra logistical requirements this brings to business."

The changes brought about by the pandemic must be embraced, and data such as this helps to inform key strategies, for the months and years ahead".

Steve Mann, Director of External Regulatory Affairs, Nelsons

"This survey is encouraging in demonstrating that people are trying to keep themselves healthy during this pandemic and are seeing the value of regular supplementation of their diets. Our industry is ideally placed to help consumers with these choices and to actively support the whole healthcare industry by complementing healthy diet and lifestyle. This pandemic is clearly going to have long term implications, as people seek out ways to maintain their health now and in the future ".

Martin Last, MPL Marketing

"The results from the Health of the Nation Survey are always very compelling but this year it has been especially fascinating. As we have seen in our own business during 2020, the pandemic has driven strong consumer awareness and interest in supplementation. Alongside proactive Government public health campaigns such as the importance of Vitamin D, I believe this awareness has resulted in very positive recognition of the health food industry and will continue to offer strong potential for growth in the future."

2020 was a very challenging year for everyone and one thing I'm very proud about us being part of an industry which makes a vital difference to people's health and will continue to do so going forwards."

Emma Ellis, Managing Director, Biocare