NMI’s consumer research study devoted to understanding consumer attitudes and behaviors related to dietary supplements/OTC/Rx and impact on product usage
Opportunities Abound in Global Health & Wellness Markets

**Consumers are actively taking control of their health**
- Many solutions exist to prevent or manage health issues
- Supplements, OTC medications and prescription drugs are providing consumers with options
- New product formats are taking hold in new ways around the globe to manage health

**Consumers want to improve their quality of life**
- The proliferation of healthy products and practices are mainstreaming
- Supplements, OTC medications and prescription drugs can be used to improve the quality of life
- They’re looking for new ways to manage health issues and improve overall vitality

**Consumers are looking for new wellness solutions**
- The identification of new ingredients provides new health benefits
- The understanding of the motivations of mainstream consumer segments provides opportunities
- New opportunities exist across for all generations – young and old alike
NMI’s Thought Leadership Fuels Insight Across The Full Spectrum of Health & Wellness

My World

My Country

My Community

My Family & My Home

ME What goes in and on my body

NMI Insights: Strategic Applications

Thought Leadership: NMI Syndicated Data & Custom Tools
Companies Need Consumer Insight Into Health & Wellness To Respond With Strategic Decisions

Who the “health & wellness” consumers really are

How they interact with your company/brands

The role of supplements/OTC/Rx

What are consumers’ unmet wellness needs

What benefits/attributes are driving behavior

Where consumers go for health-related information
Specific Research Applications & Objectives

New Product/Applications Development
- Quantify usage and frequency of use across a range of supplements, OTC and Rx
- Associate the use of specific dietary supplements with specific health issues
  - Consumer perceived deficiencies among specific nutrients
  - Interest in specific new product forms

Development of Product Messaging
- Analyze the motivational dimensionality and reasons for use
- Why are consumers using and what are the specific benefits they seek
  - Identifying claim options to enhance trial

Increasing Consumer Compliance/Usage
- Understand the issues and opportunities associated with consistent use of dietary supplements
- Quantify reasons for lapsed usage of specific supplements and barriers to use of specific dietary supplements (among non-supplement users)
NMI’s Supplements/OTC/Rx Database® (SORD)

- Most comprehensive data available examining the intersection of nutritional supplements, OTC, and pharmaceuticals
- Nationally representative sample of the population and statistically valid at the 95% confidence level to +/- 2%
- 2013 research was conducted among 4,000+ general population consumers
- Conducted via on-line methodology

**Supplements/OTC/Rx Intersection of Supplements/OTC/Rx**
- Vitamins/Minerals  •  Homeopathic
- Botanicals/Herbals  •  Rx
- Ayurvedic
- OTC medications

**SORD Database Since 2005**
- Usage rate of 50+ products
- Attitudinal statements & beliefs
- Preferred nutritional formats
- Condition/health issue mgt
- Brands, influence and media
- Reasons for use; barriers to use
- Sources of influence by product type
- Role of doctor, pharmacist
- Consumer directed healthcare
- Demographic measures
USE OF DIETARY SUPPLEMENTS:
U.S. GENERAL POPULATION

- Current Users: 62%
- Don't currently use, used to use: 11%
- Don't use, never used: 27%

DIETARY SUPPLEMENT USAGE:
CURRENT SUPPLEMENT USERS

- Light User: Used 1-2 supplements in past 30 days and used 0-2 supplements daily
- Medium User: Used 3-5 supplements in past 30 days and used 0-5 supplements daily, OR used 6+ supplements and used 0-2 supplements daily
- Heavy User: Used 6+ supplements in past 30 days and used 3+ supplements daily

Source: NMI’s Supplements/OTC/Rx Database (SORD)
©Natural Marketing Institute (NMI), 2013
NMI’s Health & Wellness Consumer Segmentation Reveals A Variety Of Opportunities Across The 2013 U.S. Population

**WELL BEINGS®: 19%**
- Most health proactive
- Influencers
- Highest organic usage
- Use some supplements
- Use many health modalities
- Most Green

**FOOD ACTIVES®: 18%**
- Mainstream healthy
- Basics, balance and control
- Desire inherently healthy foods
- Take variety of supplements
- Least eco-friendly
- Most price driven

**MAGIC BULLETS®: 23%**
- Lack commitment to healthy lifestyle
- Skew Boomer/Senior, lower income
- Health managers vs. preventers
- Weight managers
- Least likely to exercise

**FENCE SITERS®: 20%**
- ‘Wannabe’ healthy
- Most likely to have kids
- Stressed out, want help and control
- More health kicks but no clear goals
- Eco-friendly
- Active weight loss

**EAT, DRINK & BE MERRY®: 20%**
- Least health active
- Unconcerned about prevention
- Choose taste over health
- Younger
- Least likely to be PGS

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"Healthy Mainstream"

Clients leverage this tool optimizing their target messages as well as identifying primary and secondary targets
Topics Covered in the Research are Multifaceted and Actionable

- Importance of various metrics in maintaining a healthy lifestyle
- Multiple health and wellness attitudes and behaviors
- Motivations to a healthy lifestyle
- Usage rates of dietary supplements
- Reasons for use of dietary supplements
- Ways to recapture use of discontinued dietary supplements
- Health issues/medical conditions currently managing/treating
- Consumer perception of “effectiveness”, “safety” and “believability” (of health benefits) of dietary supplements vs. OTC vs. Rx
- Usage of specific brands of dietary supplements
- Usage of OTC and Rx categories/classes
- Channels and stores shopped most often for dietary supplements
- NMI’s Health & Wellness segmentation model
- Complete demographics
Opportunities Await in NMI’s Global Coverage Since 2005

Australia  Mexico
Belgium    Netherlands
Brazil     Philippines
Canada     Portugal
China      Russia
France     Singapore
Germany    South Africa
Hong Kong  South Korea
India      Spain
Indonesia  Thailand
Italy      UK
Japan      USA
Malaysia   

Additional countries to be added based on specific participant needs
Geography, Deliverables, Timing

Countries/Sample Size:
Previous Countries studied have various longitudinal and topical coverage
Specific country selection is determined by participant
Typical sample size is 1,000 general population (larger sample sizes available)
via an on-line methodology
NMI’s proprietary Health & Wellness segmentation will be included

Customize your deliverables per Country:
Inclusion of Client proprietary/custom survey questions
NMI custom analysis and written report
Custom data tables across all sponsor-proprietary and core questions
Executive presentation and on-site consulting sessions

Timing:
Participation deadline: May 2015
Sponsor deliverables: September 2015