21st Annual Health & Wellness 2019 Consumer Tracker Study

A comprehensive consumer research study of consumer attitudes and behaviors related to diet, nutrition, general health and wellness.
NMI’s Health and Wellness Trends Database

- Most comprehensive data available on health and wellness; based on **attitudes, behavior and product usage** within the world of health and wellness
- **Annual consumer research** among U.S. general population adults and primary grocery shoppers
- Currently **19 years of trended data**: 1999 through 2018, inclusive; a total of ~66,000 consumers in the database
- Nationally representative sample of the U.S. population statistically valid at 95% confidence level to +/- 1.8%
- 3rd Qtr. 2018 U.S. survey was conducted among **3,200+ general population consumers**
- Conducted via **on-line** methodology
The Health & Wellness Trends Database
Summary Content & Scope

**Drivers/Behaviors**
- Healthy lifestyle drivers
- Attitudinal statements & behaviors – diet, nutrition, supplements, exercise
- Awareness of terminology
- Ingredients - health benefits seeking, avoidance vs. fortification
- Health conditions preventing, managing/treating

**Usage/Lifestyle Patterns**
- 50+ general products & services dynamics – increase, decrease
  - ~100 specific categories
- Entry reasons, duration, frequency
  - Natural, Organic, Non-GMO, hi-protein etc
- Cooking – occasions, health, frequency, experimentation

**Shopper/Diner Insights**
- Shopping patterns across 20+ channels
- Shopping at 70+ specific stores/chains
- Dining at specific restaurants
- Away from home eating

**Brands, Influence & Media**
- Usage across 70+ brands
- Brand influence/preference
  - 25+ sources of influence
    - Lifestyle activities
    - Demographics
NMI’s Health & Wellness Consumer Segmentation Identifies Five Distinct Segments within the U.S. General Population

**WELL BEINGS**: 26%
- Most health pro-active

**MAGIC BULLETS**: 20%
- Lower commitment to healthy lifestyle

**EAT, DRINK & BE MERRYS**: 17%
- Least health active
- Little health motivation

**FOOD ACTIVES**: 14%
- Mainstream Healthy
- Self-directed balance

**FENCE SITTERS**: 23%
- ‘Wannabe’ healthy
- Quick, easy solutions

**WELL BEING Leaders**: 11%

**WELL BEING Followers**: 15%
Customize Your Applications

Customized Analysis across any of the following:

- Consumer Target Profiling
- Consumer Segmentation
- Market sizing
- Market trending across 100's of healthy categories
- Trending on consumer attitudes and behaviors

- Product/Category Usage
- White Space Analysis
- Health/Medical Conditions
- Lifestyle & Topical Interests
- Shopper Insights
- 1000's of Others…
Customize Your Deliverables

Pick the Options You Need for Your Business…

1. NMI custom analysis
   - Analysis of proprietary content with focus on your business implications and strategy – utilization of any groups from NMI core or your proprietary content
   - Access to NMI’s core trends report

2. Proprietary/custom survey questions
   - Space reserved on a first come basis
   - Overlay your custom segmentation

3. Custom data tables
   - Across all sponsor-proprietary and NMI core questions
   - Includes general population, the 5 NMI segments, and 10 custom banner points of sponsor’s choice

4. Executive presentation and consulting session

All deliverables are customized to meet your business needs
Health and Wellness Research Delivers

DON’T miss out on this opportunity to validate and support your marketing campaigns!

- Profile your Brand users, quantify the market
- Enhance your trade presentations with updated/valuable insights
- Customize your consumer campaign positioning and messaging
- Support innovation and stay ahead of the trends
- Empower your organization!
Geography, Deliverables, Timing

**USA/Sample Size**
Research will be conducted among 3000+ U.S. general population consumers
Conducted via on-line methodology
NMI’s proprietary Health and Wellness segmentation will be included

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

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**USA & Global**

2019 Health and Wellness Trends Tracker Timetable

- **Participation deadline:** September 2019
- **Sponsor deliverables:** January 2019
Natural Marketing Institute (NMI) • Ruth Homestead Corporate Center
272 Ruth Road • Harleysville, PA 19438 • phone: 215-513-7300 • fax: 215-513-1713

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