Since 2005
Supplements/OTC/Rx
2019 Consumer Tracker Study

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
- New ingredients and delivery technologies provide new health benefits

Consumers are looking for new wellness solutions
- They’re looking for new ways to manage health issues and improve overall vitality
- The understanding of the motivations of mainstream consumer segments provides opportunities
- New opportunities exist across all generations – young and old alike
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 dimensions and reasons for use
- Why are consumers using and what are the specific benefits they seek
- Identify claim options that 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%

- 4th Qtr. 2018 research was conducted among **2,000+ U.S. general population consumers**

- **Global studies** have been conducted since 2007 periodically across variety of countries

- Conducted via **on-line methodology**
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%
Topics Covered in the Research are Multifaceted and Actionable

- Multiple health and wellness attitudes, behaviors and motivations
- Usage rates of 50+ dietary supplements, reasons for use of each
- Reasons for non-compliance, discontinued use
- Health issues/medical conditions currently managing/treating
- Which nutrients are used for each condition
- Consumer perceptions 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
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
USA/Sample Size
Research will be conducted among 2000+ 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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Global Expertise in Health & Sustainability spanning 30+ countries & 1 million+ consumers!

For more info visit us at www.NMIsolutions.com

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