HEALTH & WELLNESS IN AMERICA

AUGUST 2014

PART 1: THE CONSUMER PERSPECTIVE

HEALTH & WELLNESS IN AMERICA

2014

PART 1. THE CONSUMER PERSPECTIVE

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READER'S NOTE

Given the ongoing importance of health and wellness as a prevailing consumer force, Nielsen and Natural Marketing Institute (NMI) are collaborating to uncover the major food and beverage trends influencing this burgeoning marketplace. The result is the Nielsen/NMI Health & Wellness in America series, a three-part report covering the ever-expanding health and wellness sector.

Each white paper in the series addresses a different perspective on health and wellness:

PART 1

THE CONSUMER PERSPECTIVE

A profile of the health and wellness consumer including a detailed segmentation analysis, a look at consumer health aspirations, purchase behavior and opportunistic marketing strategies.

PART 2

THE MARKETPLACE

A snapshot of the growing and dynamic health and wellness market including size, potential, growth rates and retail trends driving expansion.

PART 3

TRENDS AND OPPORTUNITIES

A look at specific trends for manufacturers and retailers to capitalize on and recommendations for those businesses that want to engage consumers to activate against emerging health and wellness trends.

ADDRESSING KEY QUESTIONS

- What unmet needs do consumers have about health and wellness and how do they impact their buying habits?
- Consumers say they want to be healthy, but do they follow through on their knowledge and wellness aspirations?
- Do consumers look at food and beverages based on the promotion of positives or the absence of negatives to achieve wellness?
- Are all consumers the same? What health and wellness marketing strategies and approaches work best for specific consumer segments?

KEY FINDINGS

- Consumers aspire to better health and healthier eating, but half admit that healthy eating is a challenge, especially in the face of rising food costs.
- The desire to achieve an improved quality of life drives consumers to pursue specific health and wellness behaviors, such as consuming healthy foods or reading package labels.
- Consumer segmentation is vital to understanding the health and wellness market and developing effective marketing strategies.
- When it comes to unmet consumer nutrient needs, fiber tops the list, followed by vitamins/minerals (in general), calcium, antioxidants and Omega-3s.
- The number of consumers who proactively use food as a means to manage specific health issues is on the rise.
- Opportunities exist to educate consumers on nutrition, with 40 percent expressing confusion over nutritional labeling on packages; manufacturers and retailers alike need to provide consumers with easy-to-understand and transparent nutritional information.

WHAT SHOULD WE KNOW ABOUT CONSUMERS

4 KEY THEMES PROVIDE THE FOUNDATION TO OUR CONSUMER PERSPECTIVE ON HEALTH AND WELLNESS

KNOWLEDGE IS KING

Consumers' desire to understand, learn about, and take ownership of health and nutrition

HEALTHY ASPIRATIONS

Interaction between consumer desire for a healthy lifestyle and whether behaviors match attitudes

FOOD AS MEDICINE

Usage of fortified foods, functional foods and beverages, and understanding benefits

NOT ONE SIZE FITS ALL

Population diversity and differences in purchase behavior across defined consumer segments

The idea of pursuing health and wellness in a holistic way has clearly caught the fancy of the American public. What was once solely the purview of health evangelists has now become a mainstream topic of conversation. Turn on the television, log on to the Internet and you'll hear experts from Dr. Oz and Dr. Phil to Dr. Weil espousing the benefits of eating healthy.

Despite the plethora of health and wellness topics in the media and the popularity of yoga, juice cleanses and CrossFit training, more than one-third of American adults are still obese according to the Centers for Disease Control and Prevention.[i] This paper investigates how consumers access and integrate available health and wellness information and how that translates into lifestyle changes and purchase behaviors.

THEME 1

KNOWLEDGE IS KING

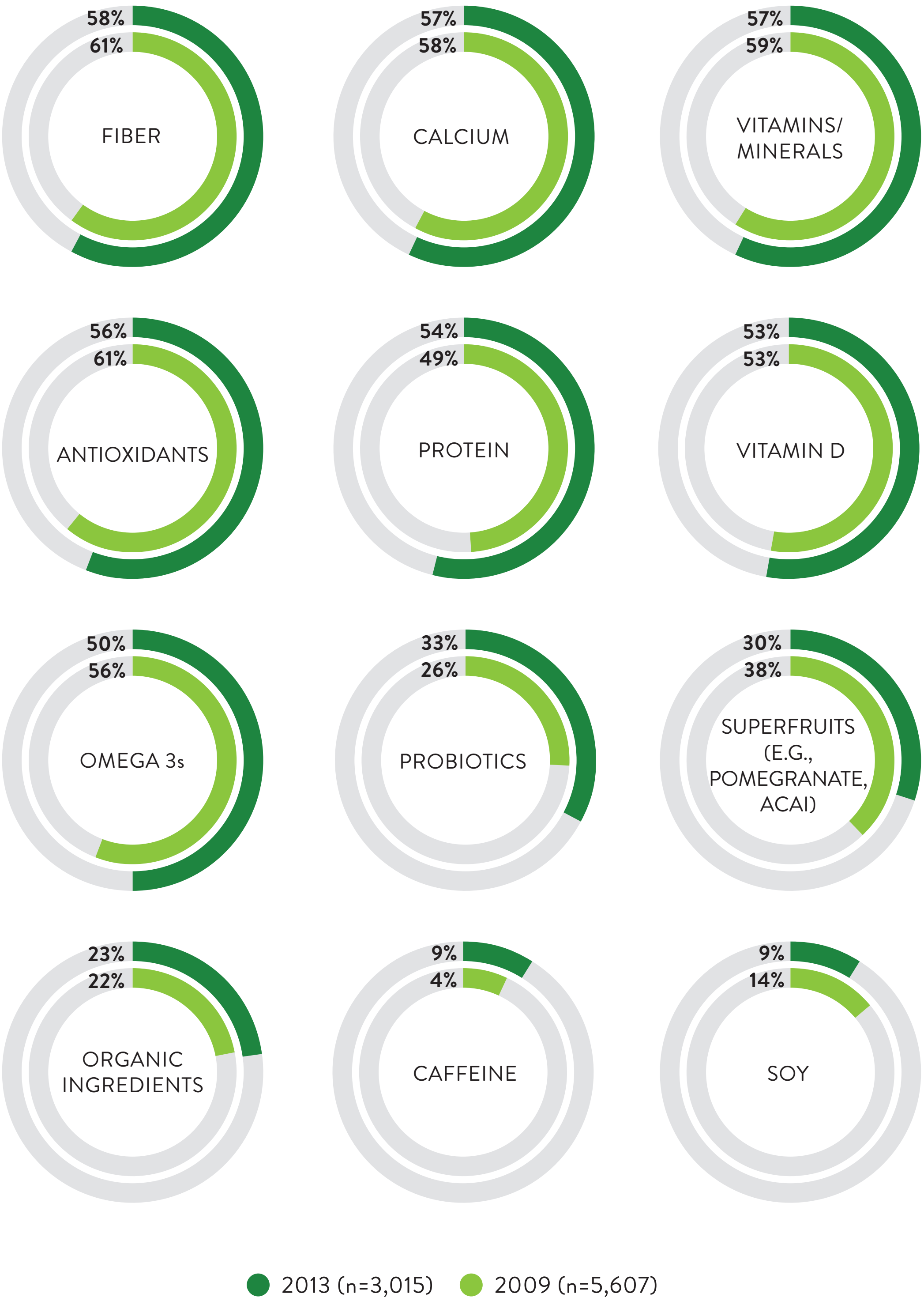
CONSUMERS SEEK OUT INFORMATION ABOUT HEALTH AND NUTRITION TO QUENCH THEIR THIRST FOR UNDERSTANDING, TO TAKE CONTROL OF THEIR HEALTH, AND TO ULTIMATELY IMPROVE THE QUALITY OF THEIR LIVES.

MANUFACTURERS AND *RETAILERS* CAN PROVIDE MEANINGFUL SOLUTIONS BY COALESCING AROUND ACCESSIBLE, EASY TO UNDERSTAND AND TRANSPARENT NUTRITIONAL INFORMATION THAT ADDRESSES UNMET CONSUMER NEEDS AND DESIRES.

Consumers express a high degree of awareness regarding health and wellness in their daily activities. According to the Harris Poll, three-quarters of U.S. adults act on that awareness, taking into account the value of fresh foods (89%), fiber and whole grains (81% each) when shopping.[ii]

Americans also demonstrate an understanding of how to manage their diet for optimal health. More than 70 percent of U.S. adults stress the importance of protein (83%), healthy fat and whole grains (81% each) and calories (80%) when contemplating how to manage their diet and weight.[iii]

% GENERAL POPULATION INDICATING THEY WANT MORE OF THE FOLLOWING



More than half of respondents in an NMI study want more fiber, vitamins/minerals, calcium, antioxidants, protein and Vitamin D in their diet. While nutrients such as protein, organic ingredients and probiotics have gained popularity, other elements such as soy and superfruits declined during the 2009-2013 period, perhaps as a wide array of foods and beverages now include these nutrients as availability has skyrocketed.

INGREDIENT PREFERENCE VARIES BY AGE GROUP

Baby Boomers, born in the 1946-1964 period, now control more than 70 percent of U.S. disposable income and drive much of the demand for healthy products[iv]. Fiber, at 62 percent, is the ingredient this age cohort "wants more of", followed by antioxidants, heart-healthy ingredients and vitamins/minerals at 57 percent each, with Omega-3s and Vitamin D at 56 percent each, calcium at 54 percent and whole grains at 53 percent.[v]

Millennials, those born between 1977 and 1995, have similar ingredient preferences compared to their Boomer cohorts, albeit in a different order and at lower levels. For example, the top three Millennial ingredients they want more of are calcium, vitamins/minerals and fiber at 38 percent each. All three nutrients also make an appearance on the Boomer "most wanted" list, although they are at higher incidence rates.[vi] There appears to be a degree of cross-pollination between health-conscious Boomers and their Millennial children, further enhanced by the increased availability of foods and beverages containing healthy ingredients.

Meanwhile, some relative newcomers on the ingredient scene are demonstrating universal interest across all age cohorts: Omega-3 fatty acids for heart and brain health, superfruits such as pomegranates (more antioxidant power than green tea)[vii] and acai berries, and probiotics for digestive health and allergies.[viii]

THE IMPORTANCE OF LABELS

Simply put, consumers are often confused. Between the Food and Drug Administration *Nutrition Facts* label design, the Grocery Manufacturers Association *Facts Up Front* initiative, and the multiple proprietary nutrition label and shelf tag systems at retail, shoppers are not quite sure what to use as a reliable guideline.[ix]

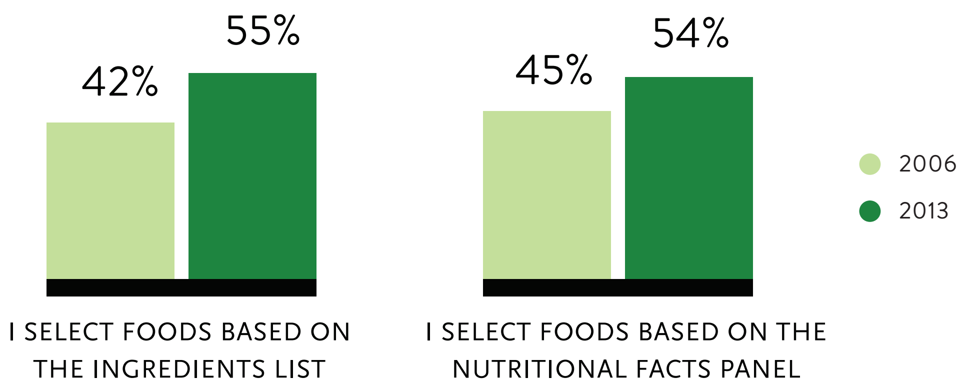
Thanks to a holistic emphasis on wellness, label data often expands beyond the scope of ingredients to include processing and growing information, a trend that started with natural and organic foods and now includes genetically-modified (GMO) foods. Vermont will require GMO food labeling beginning in 2016, a move that could be replicated in the 29 other states with pending GMO legislation.[x]

Despite consumers' labeling confusion, NMI research shows that more than half of all U.S. consumers select foods based on both the ingredient list and nutritional facts panel. Shoppers demonstrate considerable savvy about ingredient efficacy, both good and bad, and make their selections appropriately.

In fact, there has been a 13 percent increase in the number of people who examine the ingredient list and a corresponding 9 percent increase in the number checking the nutritional facts panel since 2006.[xi] Improved label clarity should lead to better in-store nutrition decisions.

CONSUMERS ARE INCREASINGLY MONITORING FOOD LABELS

... AND BASING PURCHASE DECISIONS ON THEM



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From a global perspective, Nielsen research shows that six in ten shoppers agree that they "mostly" understand nutritional information on food packaging, while 35 percent only grasp the nutrition data "in part" and 7 percent do not comprehend the information at all.[xii] Clearly, there is room for improvement and an opportunity for manufacturers and retailers to educate consumers with a more systematic approach.

THEME 2

HEALTHY ASPIRATIONS

CONSUMERS ATTEMPT TO CLOSE THE GAP BETWEEN THEIR DESIRE TO LIVE A HEALTHY LIFESTYLE AND THE DIFFICULTY OF ADOPTING WELLNESS PRACTICES, WITH VARYING DEGREES OF SUCCESS.

MANUFACTURERS AND *RETAILERS* CAN HELP CLOSE THE GAP BETWEEN ASPIRATION AND BEHAVIOR BY FOCUSING ON INTRODUCING EASY AND CONVENIENT SOLUTIONS AND EXPLORING SPECIFIC HEALTH ISSUES TO AID IN THE CONSUMER PURCHASE DECISION PROCESS.

A question for the ages: Does knowing convert to doing? It appears that aspirations are *beginning* to prompt consumer action on health and wellness issues. For example, 89 percent of consumers in an online NMI survey agree that "taking personal responsibility for one's health is the best way to stay healthy" (aspiration) while a modest 70 percent say they are actively "trying to become healthier" (behavior).[xiii]

Three-quarters of consumers feel they can "manage many health issues through proper nutrition" (aspiration) while fully half acknowledge "it can be a challenge to eat healthy" (behavior). These observations are further validated by ongoing NMI research. Fewer than half of Americans rating sugar or salt as important to diet and weight management actually restrict intake of either substance.[xiv]

ASPIRATIONS		BEHAVIORS	
Taking personal responsibility for one's health is the best way to stay healthy	89%	Trying to become healthier*	70%
Feel that I can manage many health issues through proper nutrition	75%	It can be a challenge to eat healthy*	50%
		Agree that they are eating healthier than they used to*	69%
Will take whatever means necessary to control their own health	64%		

*Source: Health and Wellness Feb 2014 Survey Results and Insights JR, 471 RESPONDENTS,FEB 2014
**Source: HI-Harris-Poll-Eating-Habits-2011-04-27

That failure to convert knowledge into action proves true on a global level as well. In a Nielsen Global Online Survey, fully one-third of shoppers cognizant of health issues, such as high cholesterol, overweight or heart concerns, conceded that these health factors had little or no influence on their grocery selections.[xv]

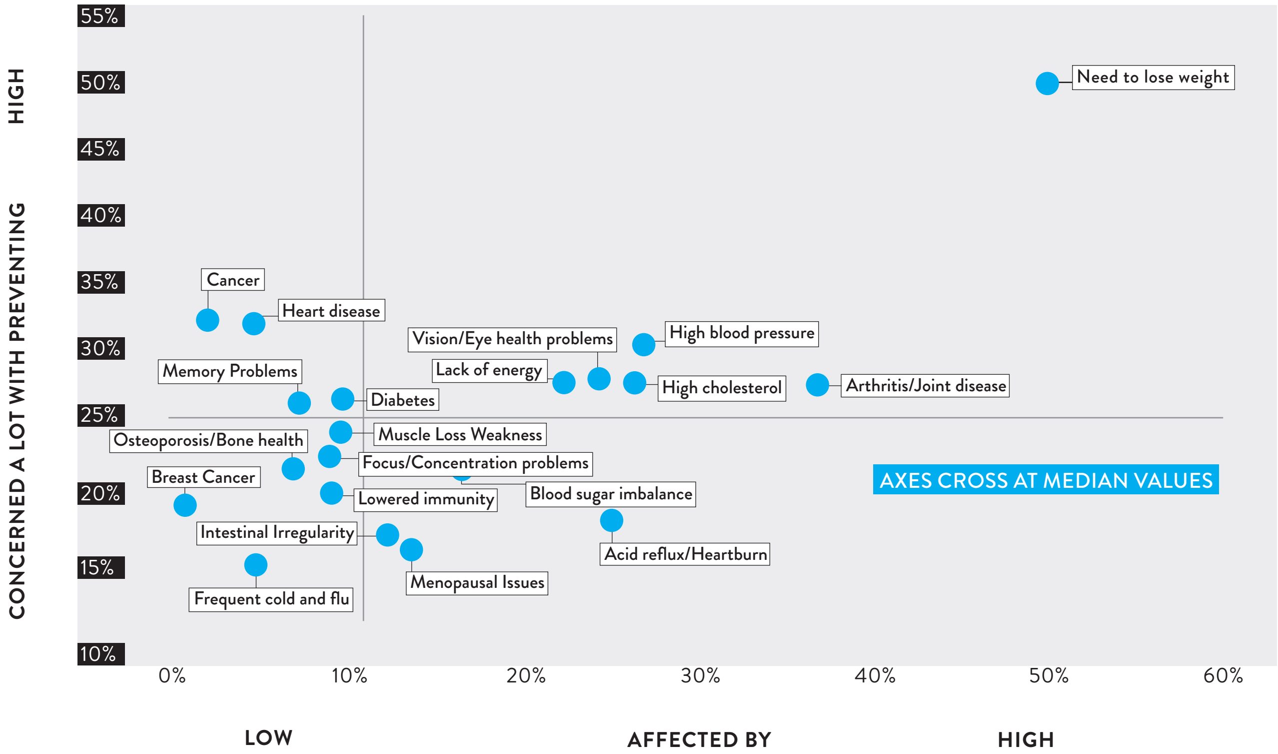
CONSUMER DISCONNECT BETWEEN KNOWING AND DOING

The disconnect between the desire to eat right and the practice of sound nutrition is evident at retail as well. In a Nielsen Global Survey, half of U.S. consumers said the availability of organic or nutritionally-enhanced products at grocery had no or next-to-no impact on their grocery purchases in the last year.

One factor that did have a major impact on food purchase decisions was inflation. More than half of consumers cited "rising food prices" as a barrier to healthy eating,[xvi] and 54 percent of consumers agreed that "healthy foods are too expensive to eat regularly."[xvii] Another consideration influencing food shopping decisions was taste. Half of consumers agreed that "...healthy food should taste good, and I am not willing to give up taste for health."[xviii]

All age cohorts, but especially Baby Boomers and Matures, cited weight maintenance and heart health as the two most important wellness aspirations. These health-aware population segments also recognized that achieving those goals requires taking personal responsibility for managing health through proper nutrition. This finding suggests that advertising and promotional campaigns emphasizing the personal responsibility angle of health and wellness could be highly effective with these groups, especially as satisfaction with America's healthcare system continues to wane.

AFFECTED BY & CONCERNED ABOUT HEALTH ISSUES



Source: Natural Marketing Institute, all rights reserved

Predictably, the "largest" opportunity for manufacturers resides in products that help consumers manage their weight, a health situation that ranks high both on the "managing" and "concerned about preventing" criteria. Almost two-thirds of Americans state that they "don't exercise enough," while more than half agree that they splurge on foods when dining out at restaurants and often surrender to their cravings for tasty but unhealthy food options.[xix]

In addition, introducing solutions designed to stave off specific high concern/low management conditions such as heart disease, diabetes, memory problems and the like, may be the prescription for improving category sales through product innovation. The question remains, however: Will providing more good-for-you ingredients influence consumer health and wellness behavior and close the information-to-action gap?

THEME 3

FOOD AS MEDICINE

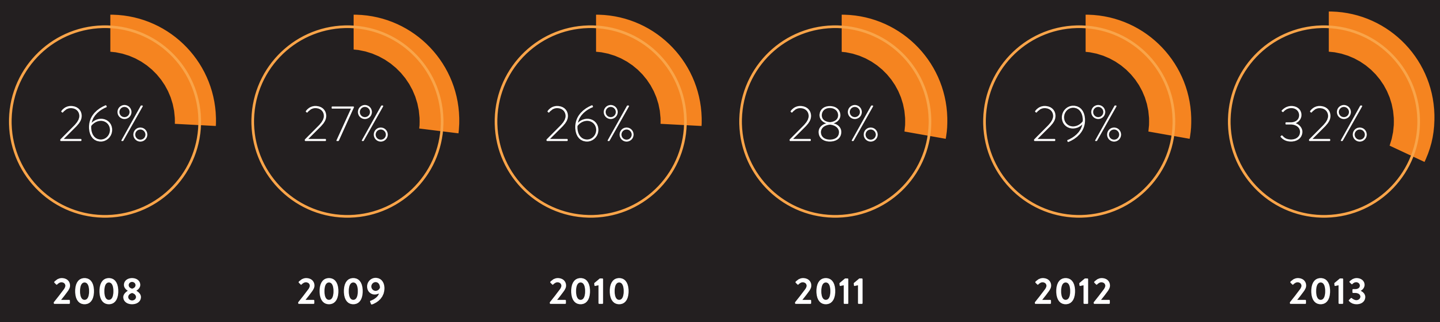
CONSUMERS ARE GETTING THE MESSAGE THAT "YOU ARE WHAT YOU EAT" AND ACTIVELY USE FOODS TO ADDRESS OR FORESTALL HEALTH ISSUES AND MEDICAL CONDITIONS.

MANUFACTURERS AND *RETAILERS* CAN PROMOTE WELLNESS BY POSITIONING PRODUCTS THAT INCORPORATE IMPORTANT HEALTH SOLUTIONS AND EDUCATING THE PUBLIC ABOUT THEIR ASSOCIATED HEALTH BENEFITS.

When is food more than food? When it is a functional food, it is defined by the Academy of Nutrition and Dietetics as "a food that provides additional health benefits that may reduce disease risk and/or promote good health."[xx]

Based on NMI longitudinal consumer data, one-third of American adults believe that functional foods and beverages can be substituted for some medicines in their overall health plan.[xxi] That trend is even more pronounced among Baby Boomers and Matures.

% GENERAL POPULATION INDICATING THAT FUNCTIONAL FOODS/BEVERAGES CAN BE USED IN PLACE OF SOME MEDICINES



Source: Natural Marketing Institute, all rights reserved

A PRESCRIPTION FOR HEALTHY EATING

In order to successfully use food as a remedy for what ails them, consumers first need to understand the benefits derived from specific nutrients, such as digestive health and probiotics, heart protection and Omega-3 fatty acids, strong bones and calcium. Protein represents one example of successful consumer education on the functional food front.

More than half the population now seeks out foods that are high in protein, with a significantly higher percentage (73 percent) reportedly consuming high protein food and beverages in the past year.[xxii] The accelerant behind protein growth is consumer understanding of the relationship between protein and its role in weight management, muscle development, strength and energy.

FORTIFIED FOOD CONSUMPTION REMAINS STRONG

In the years spanning 2005 to 2013, fortified food consumption remained stable with roughly two-thirds of the general population using fortified foods or beverages each year. However, consumer willingness to pay a premium for these fortified products remained virtually constant over the last six years at only 16 percent.[xxiii]

Further fueling the fortified food trend is a belief held by 75 percent of American adults stating, "I can manage many of my health issues through proper nutrition." This percentage represents a statistically significant increase over the last three years.[xxiv]

While health claims do help sell foods and beverages, only one in five consumers express a strong preference for them. In fact, health claim preference is not growing, unlike the preference for other attributes. However, several population segments remain more responsive than the average to health claims. These include natural channel shoppers at 29 percent and Millennials at 27 percent.[xxv] It may well be that consumers require more specifics supporting health claims, such as benefit details or scientific proof, to make the claims more attractive.

The fortified and functional food and beverage category has significant opportunities to expand in two major ways. First, the category can expand by creating new product formats that incorporate more traditional but necessary daily nutrients, such as calcium and fiber. Second, it can expand via fortification opportunities using emerging nutrients such as phytosterols and probiotics, which are more difficult to obtain in a typical American diet.

THEME 4

NOT ONE SIZE FITS ALL

ALL CONSUMERS ARE NOT CREATED EQUAL. THEY DIFFER IN ATTITUDES, PURCHASE BEHAVIOR AND WELLNESS ORIENTATION, REQUIRING MORE FOCUSED APPROACHES.

MANUFACTURERS AND *RETAILERS* CAN SELECT HIGH POTENTIAL SEGMENTS THAT DEMONSTRATE A COMMITMENT OR WILLINGNESS TO EATING RIGHT AND PROVIDE PRODUCTS AND MESSAGES THAT ARE TAILORED TO SUCH SEGMENTS.

The NMI Health and Wellness Segmentation framework identifies five mutually exclusive consumer segments that are grouped along the lines of differentiated health attitudes, behavior and psychographics. They include:

- WELL BEINGS®
- FOOD ACTIVES®
- MAGIC BULLETS®
- FENCE SITTERS®
- EAT, DRINK & BE MERRYS®

NMI HEALTH & WELLNESS SEGMENTATION

WELL BEINGS® — 19%

- Most health pro-active
- Leaders & influencers
- Most multi-cultural

FOOD ACTIVES® — 18%

- Mainstream healthy
- Basics & balance

MAGIC BULLETS® — 23%

- No healthy lifestyle commitment
- Managers vs. preventative

FENCE SITTERS® — 20%

- 'Wannabe' healthy
- Stressed, want control
- Multi-cultural segment

EAT, DRINK & BE MERRYS® — 20%

- Least health active
- Taste over health

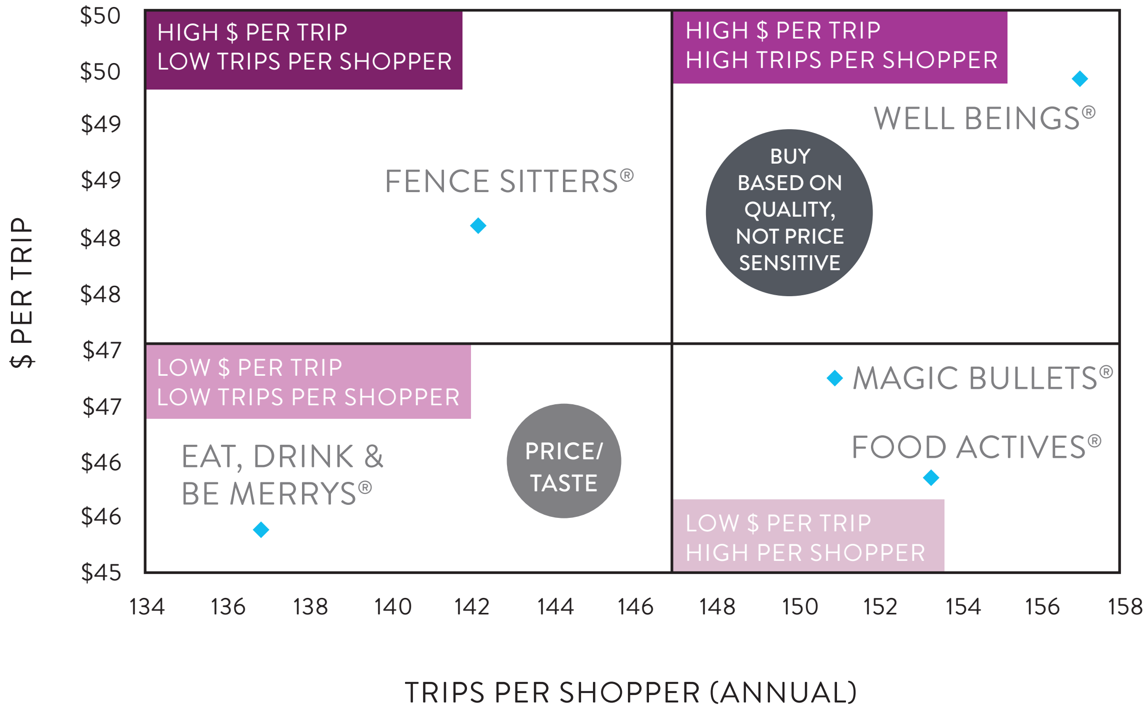
WELL BEINGS comprise 19 percent of the American population and serve as trend predictors, opinion leaders and key influencers on health and wellness topics. As the most health-proactive segment, they record the highest usage of many healthy foods and beverages. They demonstrate a concern for the environment and integrate many health modalities into their lifestyles.

WELL BEINGS, the highest value segment, make the most shopping trips per household (157) and ring up the most expensive baskets both per trip ($49.40) and per household per annum ($7,754).[xxvi] These consumers patronize a diverse set of retailers, from convenience stores to the major grocery banners, with one notable exception – they frequent Whole Foods Market almost three times as often as other segments.[xxvii] Beyond using WELL BEINGS to monitor upcoming trends, this segment is continually setting the bar higher regarding their health. This highly proactive health orientation drives them to constantly search for the next best solution for maintaining a healthy lifestyle. They represent a prime target for leading edge products.

FOOD ACTIVES comprise 18 percent of the population and can be described as a "mainstream healthy group"– dedicated to health through healthy eating, managing weight and exercise based on a more traditional and balanced outlook toward health and wellness. While they want inherently healthy foods, that desire is offset by price sensitivity and late new product adoption.

FOOD ACTIVES shop frequently (153 trips per household), but are modest spenders with an average basket size of $45.80 per trip, and an annual basket ring of $7,021 per household.[xxvii] FOOD ACTIVES are highly oriented toward personal responsibility when maintaining their health. They represent opportunities for companies focused on naturally nutritious foods and other trends such as clean label products – a perfect target for fresh, less processed store perimeter products.

DIVERSITY IN SHOPPERS



Source: Natural Marketing Institute (NMI), U.S. General Population.
Nielsen Homescan Panel, Total U.S. – 52 weeks ending 12/28/13

MAGIC BULLETS comprise 23 percent of the population and prefer to manage health with "medicine" rather than commit to a healthy lifestyle via foods/beverages. Reporting the heaviest reliance on both prescription drugs and supplements, these "conveniently healthy" consumers nevertheless express concern about and manage their weight. MAGIC BULLETS tend to address developed health conditions reactively with a pill, rather than work to prevent them through diet, exercise and food.

MAGIC BULLETS occupy the middle ground, exhibiting average shopping frequency and spending patterns, visiting retail channels 151 times per household and spending $46.72 per trip with a total household basket ring of $7,047 per year.[xxix] MAGIC BULLETS are a prime target for products and services which can help them manage their existing health issues and fill their need for quick and effective solutions. Products such as functional foods and beverages may provide solutions for their reactive approach to a healthy lifestyle.

FENCE SITTERS comprise 20 percent of the population and aspire to be healthy but admit to difficulty of juggling kids and the stresses of daily life. They tend to jump on the latest health kick without setting clear goals but look for guidance. This segment is a prime target for easy, convenient and healthy food solutions.

FENCE SITTERS bring the second most valuable baskets to check-out ($48.01 per trip) but fall to fourth place among the five segments on the total basket ring per household metric ($6,827) due to the modest number of shopping trips per household (142).[xxx] As their name implies, FENCE SITTERS are health strivers and oftentimes exhibit contradiction between their attitudes and their behaviors based on their hectic lifestyle. They want to have healthy behaviors, but sometimes they fall short – a clear opportunity for companies to provide easy solutions and guidance.

EAT, DRINK & BE MERRYS comprise 20 percent of the population and remain indifferent towards healthy eating or initiating most healthy lifestyle activities. They remain unconcerned about prevention and when given a choice, they value taste over health benefits when food shopping. Adding to their barriers, they are price sensitive.

EAT, DRINK & BE MERRYS may be living for the moment, but they are not spending their money at retail. This segment accounts for the fewest number of retail shopping trips (137), the lowest individual basket rings ($45.38) and the lowest annual overall basket ring per household ($6,210).[xxxi] Regardless of their segment name, EAT, DRINK, & BE MERRYS can still be a target for some health and wellness categories. Their healthy behaviors are beginning to enter their consciousness as they are starting to realize they are not invincible. Taste is still king for this group, but opportunities exist to engage them with healthier products – especially within categories which are not typically wellness-oriented.

SEGMENT PSYCHOGRAPHICS INFLUENCE PURCHASE BEHAVIOR

While the NMI segmentation is based on self-reported attitudes, behavior and psychographics, it has been validated with actual product purchase patterns based on actual shopping behavior through Nielsen. As would be expected, one segment surfaces as the valued health and wellness Super Consumer: the WELL BEINGS. Their profile stands in stark contrast to the least health-active group, the EAT, DRINK & BE MERRYS.

DIVERSE CATEGORY DEMAND ACROSS SEGMENTS

$BUYING RATE INDEX

	WELL BEINGS	FOOD ACTIVES	MAGIC BULLETS	FENCE SITTERS	EAT, DRINK & BE MERRYS
FRESH PRODUCE	**141**	104	90	96	80
WINE	**140**	103	84	88	82
VITAMINS	**124**	**117**	105	92	49
BOTTLED WATER	**118**	92	99	107	88
DRY PASTA	109	99	97	98	99
CANDY	94	103	105	95	97
BEER	86	90	104	100	**116**
CARBONATED BEVERAGES	76	96	104	101	**115**
TOBACCO & ACCESSORIES	74	86	**116**	84	**112**

WHERE IS YOUR CATEGORY OR BRAND CONNECTING?

As expected from a highly motivated, health-active segment, the WELL BEINGS' buying rate over-indexes (meaning they buy more per household than the average U.S. household) in categories that support wellness goals such as fresh produce (141), wine (140), perhaps due to red wine antioxidants, vitamins (124) and bottled water (118).[xxxii]

At the opposite end of the spectrum sit the EAT, DRINK AND BE MERRYS. It should come as no surprise that they over-index in categories that support a carefree lifestyle such as beer (116), carbonated beverages (115) and tobacco (112).[xxxiii]

CONCLUSIONS

Health and wellness is growing up, marked by the proliferation of healthy products and practices which are mainstreaming across all types of categories and consumers. The consumer pursuit of personal responsibility is becoming more customized, moving toward individualized solutions such as food intake mobile apps that facilitate deeper control into one's health.

The growth and progression of good-for-you foods and beverages further reveal how consumers are pushing the envelope in search of better, healthier and smarter solutions which best fit their lifestyle and specific needs.

NMI's Health and Wellness segmentation, along with the integration across many Nielsen solutions, highlights how consumers approach health differently and how these health attitudes and behaviors require different strategies and approaches for manufacturers and retailers. In the end, the future of health and wellness can no longer support a 'one-size-fits-all' mentality.

The Nielsen/NMI collaboration provides an essential guide when assessing opportunity analysis, new product development, marketing communications and overall strategic planning, as it analyzes the many transformations across consumers and the health and wellness marketplace.

Regardless of challenges in the health and wellness space, the motivation to foster strategies for a healthier America is powerful, because healthier consumers make for a healthier bottom line.

DATA SOURCES

Nielsen Homescan: Nielsen's consumer panels monitor shopper behavior for more than 250,000 households in 25 countries. The U.S. sample is the largest longitudinal panel representing all-outlet purchases including both Spanish- and English-speaking Hispanics. Nielsen panels help marketers understand the why behind the buy to enhance marketing strategies.

Nielsen Global Online Survey: A series of regular online surveys conducted with more than 30,000 online consumers covering a range of timely topics. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or 10 million online population for survey inclusion. The Nielsen Global Survey, which includes the Global Consumer Confidence Index, was established in 2005.

NMI Health & Wellness Trends Database: The industry's most comprehensive wellness insight source based on annual research among general population U.S. consumers. The database began in 1999 and now includes 50,000+ consumers. Results include detailed evaluations of attitudes, behaviors, and psychographics, among many other topics across a wide spectrum of market sectors, including CPG, restaurants, and retail. Annual results are nationally representative of U.S. households, statistically significant at the 95 percent confidence level with a sample reliability of +/-1.2 percent.

NMI Health & Wellness Segmentation: A segmentation model that divides the entire U.S. adult population into one of five mutually-exclusive segments. Developed in 2001, the model was derived through a combination of advanced statistics including exploratory and confirmatory factor analysis, convergent cluster analysis, and discriminant functions, among other techniques. It has been validated across multiple industries and global geographies. A typing tool (algorithm) is used to segment data sets, with an accuracy of 80+ percent.

CONTRIBUTORS

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FOOTNOTES

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xxiv Natural Marketing Institute 2013 Health & Wellness Trends Database

xxv Natural Marketing Institute 2013 Health & Wellness Trends Database

xxvi Nielsen Homescan Panel, Natural Marketing Institute Health & Wellness Segmentation

xxvii Nielsen Homescan Panel, Natural Marketing Institute Health & Wellness Segmentation

xxviii Nielsen Homescan Panel, Natural Marketing Institute Health &Wellness Segmentation

xxix Nielsen Homescan Panel, Natural Marketing Institute Health & Wellness Segmentation

xxx Nielsen Homescan Panel, Natural Marketing Institute Health & Wellness Segmentation

xxxi Nielsen Homescan Panel, Natural Marketing Institute Health & Wellness Segmentation

xxxii Nielsen Homescan Panel, Natural Marketing Institute Health &Wellness Segmentation

xxxiii Nielsen Homescan Panel, Natural Marketing Institute Health & Wellness Segmentation

ABOUT NMI

Natural Marketing Institute (NMI) is an international strategic consulting and market research company specializing in health & wellness, sustainability and healthy aging. As a leading business consulting and market research firm, NMI assists a range of Fortune 500 and start-up companies across many types of industries. By utilizing a diverse mix of proprietary methodologies and comprehensive syndicated data, NMI provides its clients with insightful market analysis and strategic planning. For more information, visit www.NMIsolutions.com.

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ABOUT NIELSEN

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