



Nutritional Supplement / OTC / Rx Consumer Insight & Market Opportunity Report



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NMI's Supplement/OTC/Rx Database (SORD)[™]

NMI's Supplement/OTC/Rx Database is the industry's most comprehensive and robust data collection vehicle ever undertaken to examine the intersection of nutritional supplements, OTC and pharmaceuticals.

Now in its third year, it contains the most in-depth consumer insights and breakthrough learnings about vitamins/minerals, botanicals, Ayurvedic and specialty supplements, including their application in functional foods/beverages, and the dynamics associated with OTC (including homeopathic) and Rx medications.



NMI's Supplements/OTC/Rx Database (SORD): Methodology & Objectives

The overall objectives are to develop unique and specific consumer insight to maximize client learning and opportunities in terms of attracting new consumers, increasing compliance and retention and developing compelling messaging and communication strategies.

METHODOLOGY

- Quantitative research of 2,010 U.S. adults
- Nationally projectable to the U.S. population
- Over-sampling to all demographics, including ethnic groups, to align with U.S. Census
- Online research survey methodology, conducted in Sept/Oct 2009
- Statistically significant at the 95% confidence level to +/- 2%

Introduction, Overview and Pricing



Natural Marketing Institute (NMI) is pleased to present *The Nutritional Supplement / OTC / Rx Consumer Insight & Market Opportunity Report*. This is NMI's most in-depth endeavor in researching and analyzing the nutritional/dietary supplement market from the consumer perspective, including over 100 pages of consumer attitudes, behaviors and product usage patterns. Every page offers unique insights with the presentation of charts, graphics or tables accompanied by analysis and commentary on associated market elements and key opportunities.

The U.S. dietary supplement market continues to gain momentum and represents significant opportunities in both traditional dietary supplements and functional food applications. This report provides a comprehensive view of the consumer and the marketplace providing the basis for insight, implications, and opportunities. Representative topics include:

- New Product and Applications Development
 - Quantify usage and frequency of use across a complete 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
 - Sourcing issues, preferences, etc.
- Development of Product Messaging
 - Analyze the motivational dimensionality and reasons for use
 - Why consumers using and what are the specific benefits
 - Claim options to enhance trial

Introduction, Overview and Pricing



- Enhancing Consumer Compliance and Lapse in Use
 - Understand issues and opportunities associated with usage compliance
 - Quantify reasons for lapsed usage of specific supplements and barriers to use of specific dietary supplements (among non-supplement users)

Pricing

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