



# Lifestyle Clusters and PCH portfolio strategy overview

Onboarding document

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## Executive summary

- The Wellness Market for Dietary Supplements is governed primarily by choices in the **treatment and prevention of health conditions**, providing a foundation for PCH to develop **consumer-led growth opportunities**
- PCH can lead the **transformation of a fragmented, product-oriented market** to a more **scalable, consumer-centric view** of lifestyle solutions through a comprehensive view of **seven Lifestyle clusters**
  - **The seven lifestyle clusters** represent groups of people who can be seen in their entirety based on the multitude of conditions they seek to treat or prevent, their needs, attitudes toward health & wellness, age/lifestage and broader wellness behaviors
- There is **significant upside for PCH** in both Treatment and Prevention, by clearly **addressing consumer confusion and uncertainty** through the creation of more powerful master brands in a **cohesive portfolio architecture**
- **We believe that the important learning about consumers' holistic approach to Wellness:**
  - Will be **globally applicable**
  - Can be **applied to Health**
  - **Will continue to grow**, fed by increasing knowledge and government/industry/academic information

# Contents

- **Integrated Wellness Growth Map**
- **Lifestyle Cluster details**
- **PCH portfolio application**
- **Appendix**

# We can unlock dramatic growth by bridging the gap between the way marketers and retailers serve consumers today vs. the way consumers actually think and behave

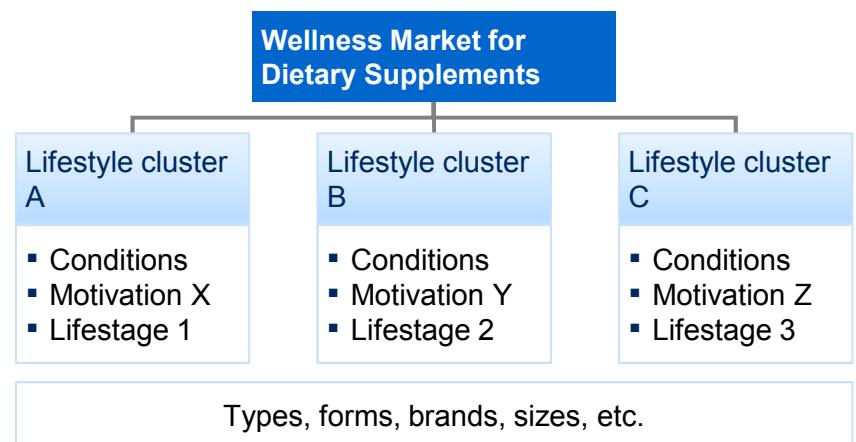
## Manufacturer and Retailer

- Marketing and retail execution is oriented around **individual point solutions** with emphasis on product attributes (e.g. composition and form)
- Consumers are left on their own to sort through **a complex taxonomy**, often leaving them confused and not inspired to act
- Growth opportunities are **small, fragmented**, and difficult to address in a competitively ownable and efficient way



## Consumer

- Consumers approach wellness in **a holistic way**, where conditions, lifestyle, lifestage, and attitudinal predisposition towards proactive vs. reactive health care are inter-related
- **"Lifestyle clusters"** represent this total context in which consumers make choices and trade-offs in wellness decisions



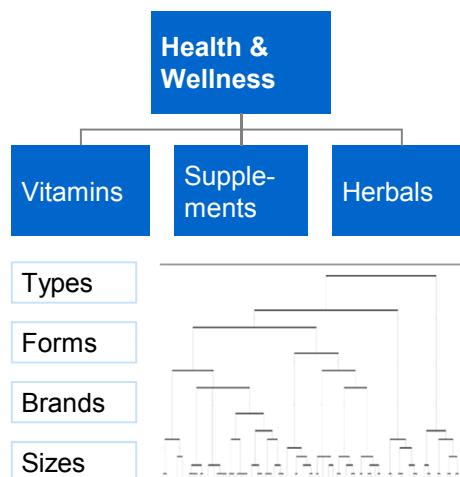
# PCH can lead the transformation of a fragmented, product-oriented market through a more scalable, consumer-centric view of lifestyle solutions

From...

→→ **Single point** solution

Emphasis on **product attributes** (e.g. composition and form)

**Fragmented**, granular product marketing

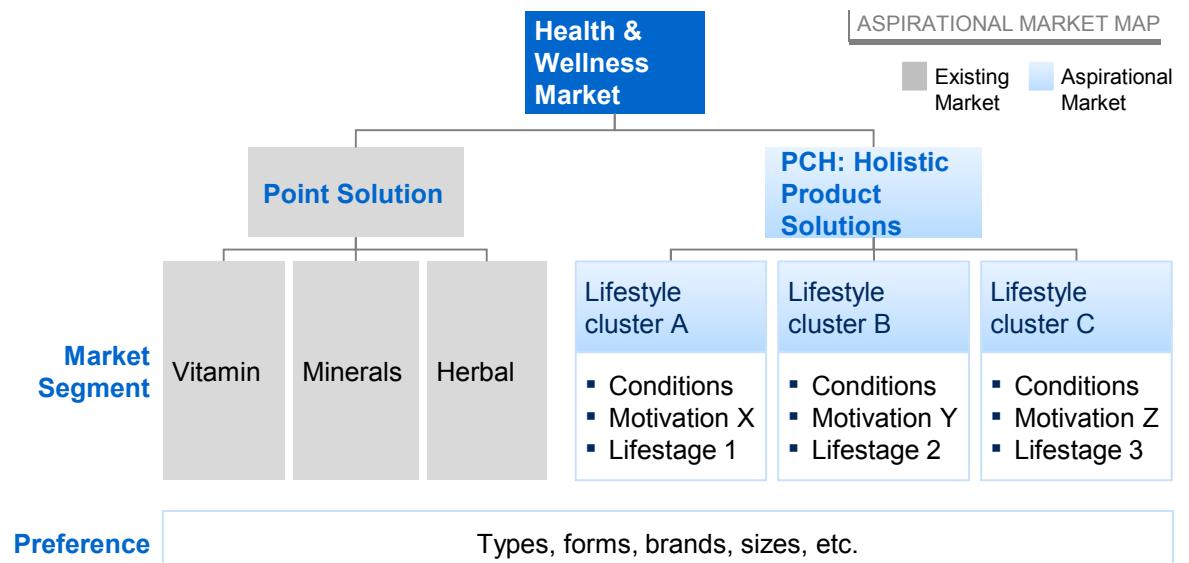


To...

→← **Holistic** solutions grounded in **integrated view of consumer decisions**

Differentiation on the basis of addressing the **multiplicity of consumer needs**

Cohesive, **efficient** platform marketing



# Consumers have “bundles” of wellness needs, many of which are left unaddressed; huge upside for PCH on both treatment and prevention

## Consumer-based behaviors show an opportunity ...

### Observations

- **90% of consumers have or are concerned about preventing** one or more health conditions
- The average consumer has from or worries about ~10 different conditions
- **70% engage in a range of behaviors** from Rx drugs, VMS, diet and exercise, for treatment and prevention
- However, 50% of existing conditions are not treated; **85% of concerns are not addressed**
- **43%** said they are confused by all the VMS options

### Implications

- Many opportunities are left unaddressed because **consumers are too confused or overwhelmed by the H&W product landscape to act, and uncertain of products' efficacy**
- There is an opportunity to help consumers **address their combinations of conditions** in a more holistic way

Optimal approach allows PCH to use the lifestyle clusters and the associated needs and motivations that govern consumer behaviors as **the basis for a coherent, powerful portfolio architecture**

## Related World: Building growth platforms against consumers in their totality could lead to competitive advantage, as shown in Sport and Consumer Electronics



### Core consumer insights

- Consumers have the desire to express their athleticism through self-identification with different athletic personas
- Activities and underlying needs drive consumer electronics product usage

### From...

- **Product form/function driven** (e.g. sneakers, tops, bottoms, jackets, accessories)



### To...

- **Athletic personas:** running, tennis, golf, soccer, cross-training



- **Distinct product attributes** to address individual consumer needs



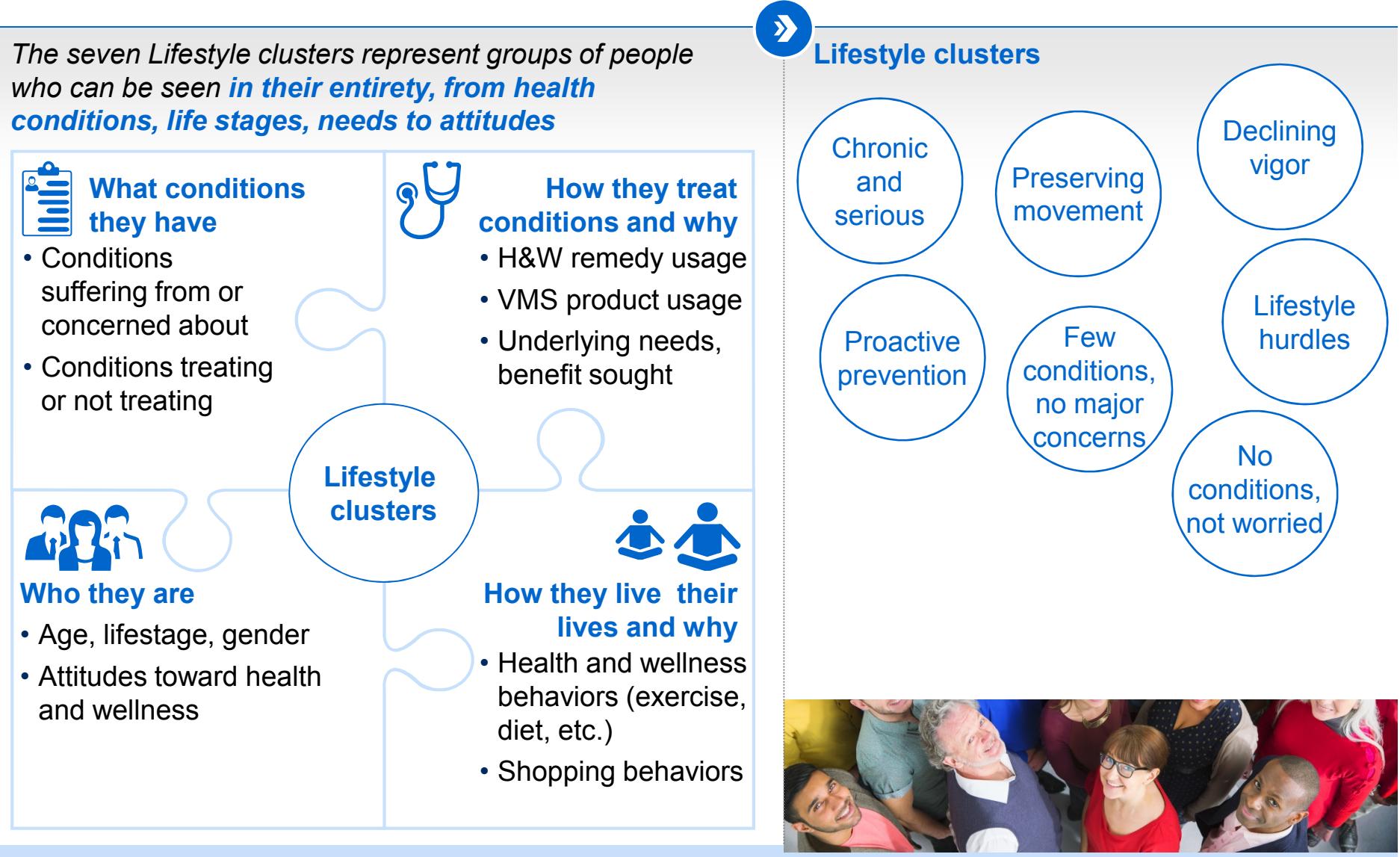
### Need-based solutions



- **Integrated services/ ecosystem with devices based on consumer activities** (email, gaming, social media, watching TV) and **relevant end benefits**

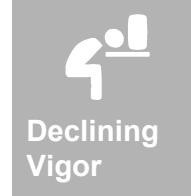


# The seven lifestyle clusters allow PCH to build growth platforms that address the multiplicity of consumer needs in an integrated way

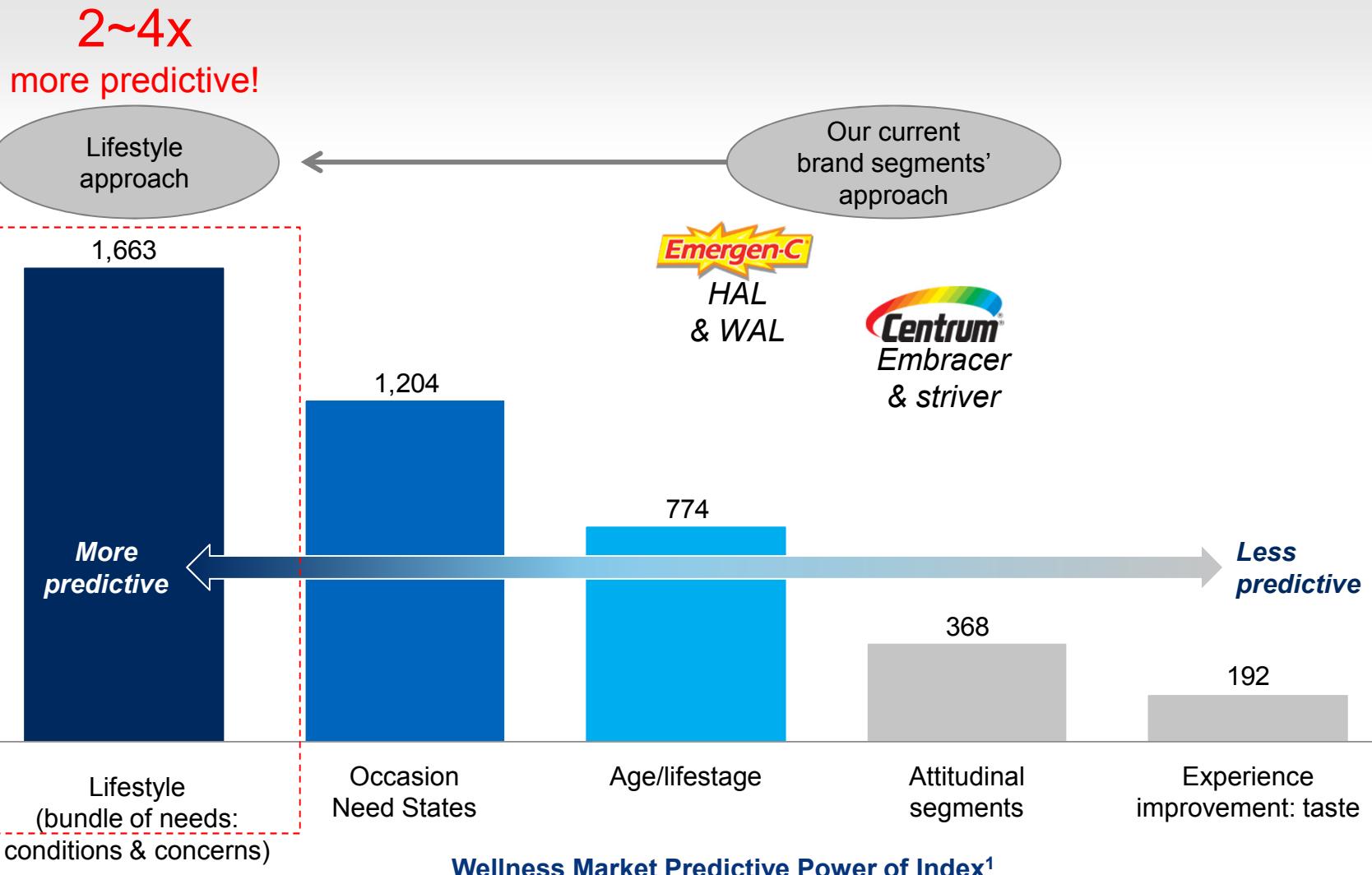


# 7 Lifestyle Clusters That Separate Wellness Consumers

Prioritized clusters  
Shadow clusters

	 Chronic and Serious	 Declining Vigor	 Preserving Movement	 Lifestyle Hurdles	 Proactive Prevention	 Few Conditions	 No Conditions
% of pop	14%	10%	11%	14%	16%	24%	10%
% of VMHS \$	17%	11%	14%	12%	15%	24%	7%
Who & What?	Older, currently suffer from and actively treat <b>heart</b> and <b>systemic</b> conditions	Suffer from many conditions ( <b>oral, vision, digestive, immunity</b> ); look to prevent <b>heart</b> conditions	Currently suffer from and actively treat <b>joint</b> and <b>bone</b> issues	Suffer from <b>energy</b> and <b>sleep</b> conditions; look to prevent <b>movement</b> and aging conditions	<b>Proactively</b> treat existing conditions but are concerned about many others	Have some health concerns but <b>do not actively address</b> them	<b>Do not suffer</b> or worry about any health conditions
Bundle of Needs (concerns & conditions)	<ul style="list-style-type: none"> <li>high BP</li> <li>cholesterol</li> <li>diabetes</li> </ul>	<ul style="list-style-type: none"> <li>multiple and widest array</li> </ul>	<ul style="list-style-type: none"> <li>joint</li> <li>arthritis</li> <li>fatigue</li> </ul>	<ul style="list-style-type: none"> <li>energy</li> <li>stress</li> <li>sleep</li> </ul>	<ul style="list-style-type: none"> <li>immunity</li> <li>high BP</li> <li>cholesterol</li> </ul>	<ul style="list-style-type: none"> <li>Choles- terol</li> <li>fatigue</li> <li>weight</li> </ul>	-

# Lifestyle approach Is more predictive in behavior vs. our current approaches



1. The PPI (Predictive Power of Index) identifies the importance of each driver in the Market Map. More influential drivers of choice have a higher index (100 index indicates average discriminating power); less influential drivers have a lower index

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## LIFESTYLE CLUSTER: Chronic and serious

*Currently suffer from and actively treat heart and diabetes issues*

Respondents: 14%

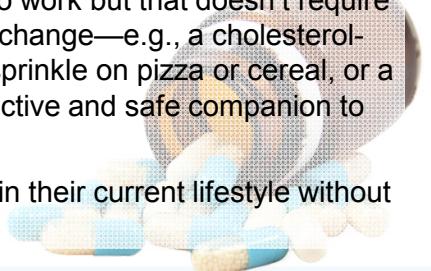
VMS \$ spend: 17%

### What we know

- People in the Chronic and serious cluster have many serious conditions like high cholesterol and diabetes they want to treat or prevent
- They treat a large proportion of their current conditions, primarily with Rx/OTC, and sometimes add heart supplements like fish oil
- Treatment is triggered by doctor recommendations; prevention by friends and family
- They tend to be older with weight issues. They don't put too much effort into their health in terms of diet or exercise, though they focus on getting the most out of every day

### What we think

- While this group is not generally engaged with their health overall, they take prescription medication because they know it works for their conditions and it's easy. Their doctor tells them to take it, their cholesterol goes down, for example, so they also have proof, which is the motivation this otherwise passive group needs
- A way to get them to engage more in the category might be to provide a product that is proven to work but that doesn't require much additional effort or lifestyle change—e.g., a cholesterol-reducing powder that one could sprinkle on pizza or cereal, or a supplement positioned as an effective and safe companion to prescription heart medication
- **Their wellness goal** is to maintain their current lifestyle without fear or discomfort





## LIFESTYLE CLUSTER: Preserving movement

*Currently suffer from and actively treat joint and bone issues*



Respondents: 11%

VMS \$ spend: 14%

### What we know

- People in the Preserving movement cluster tend to be older and are suffering from joint issues including arthritis and the signs of aging, and they take an active role in treating existing conditions—many have had a health scare that served as a wake-up call
- When they address their conditions, they do so by exercising, eating right, and taking VMS such as joint supplements and calcium as well as some Rx
- Although they are concerned about future heart health and memory acuity—they don't address many of those conditions, and tend to stay very focused on their joints and bones.  
Preventing future health issues tends to be at the suggestion of friends and family

### What we think

- While this group is generally healthy and might otherwise not worry, they are more aware of their health due to their painful joints and their friends' and family's concern.
- Movement with their stiffness is often tiring so they frequently fight fatigue
- One way to help this group might be to provide a targeted bone, joint, and muscle offering or one that soothes joint pain while boosting energy
- **Their wellness goal** is to maintain their active lifestyle without feeling limited by pain





## LIFESTYLE CLUSTER: Declining vigor

*Suffer from oral problems, stress, and fatigue; look to prevent aging conditions*



Respondents: 10%

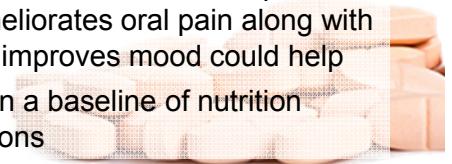
VMS \$ spend: 11%

### What we know

- People in the Declining vigor cluster suffer from the greatest number and the widest array of conditions, especially oral and including sleep/stress problems.
- They do tend to treat a solid proportion of their conditions
- They are also concerned about many serious conditions associated with aging, although they do less about them
- They use a wide range of VMS, Rx, and functional food and beverages; but otherwise they do not live healthy lifestyles, and they know it.

### What we think

- These people are stressed and anxious, and they don't handle the pressure well, which results in additional health concerns as well as a lack of confidence that changing their lifestyles could help—their health is consequently in a downward spiral.
- The broad nature of their health issues might be why they look to such a wide range of solutions; their overall unhealthy lifestyles might be a function of high levels of anxiety and fatigue that paralyze them
- One thing they know they might be able to do is ensure they are getting the nutrients they need through VMS, as it is an easy solution that can fit into a hectic schedule. Perhaps a “broad spectrum” solution that ameliorates oral pain along with something that soothes, calms or improves mood could help
- **Their wellness goal** is to maintain a baseline of nutrition through easy to incorporate solutions





## LIFESTYLE CLUSTER: Lifestyle Hurdles

*Suffer from energy and sleep conditions; look to prevent movement and aging conditions*



Respondents: 14%

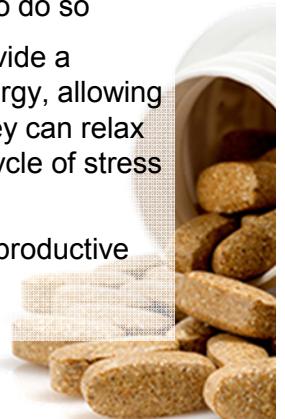
VMS \$ spend: 12%

### What we know

- Lifestyle Hurdles people primarily suffer from stress and anxiety, which in turn create many other issues, including difficulties sleeping and fatigue. They are also concerned about longer term issues that they might face due to aging.
- In order to address their conditions, they try to take charge of their health by doing a variety of things, including exercise and taking VMS, or, less frequently, Rx medication
- They tend to be young, female and of average health

### What we think

- This group is characterized by how busy they are—they simply have too many things to do.
- However, they aren't despairing, and they would help themselves more if they had an easy way to do so
- One way to help this group might be to provide a product that enhances productivity and energy, allowing them to do what they need to do so that they can relax at the end of the day and end the vicious cycle of stress and sleeplessness
- **Their wellness goal** is to find a way to be productive and consequently confident about their life and their health





## LIFESTYLE CLUSTER: Proactive Prevention

*Actively treat existing conditions but are concerned about many others*



Respondents: 16%

VMS \$ spend: 15%

### What we know

- People in the Proactive Prevention cluster have few conditions, although they are worried about many
- They focus mostly in intangible benefits of good health – overall sense of wellbeing, relaxation, and refreshment/readiness for life
- Practical concerns like preventing illness like colds and flu is important to them
- They address their concerns through a total healthy lifestyle including diet, exercise, and VMS
- They spend the most in the VMS category, and when they use VMS, they most frequently use multivitamins and fortified beverages for the sake of feeling good—waking up feeling good and energetic in the morning

### What we think

- These people are very mindful of their health, even though they don't directly address many conditions
- They are busy in their daily lives though they still find time to worry about vaguely possible future health conditions they might one day get but overall they are pretty positive about their health and, likely, their chance of avoiding major health issues if they continue to take care of themselves
- One potential way to help this group would be to provide an easy product that allows them to feel confident that they are doing everything they need to be doing to shield their health for the future or a product intended to work with other components of a healthy lifestyle—the equivalent of a “well baby” treatment
- **Their wellness goal** is to fend off any and all potential health conditions. Stay perfectly healthy forever



## LIFESTYLE CLUSTER: Few Conditions, No Major Concerns

*Have some health concerns but do not actively address them*



Respondents: 24%

VMS \$ spend: 24%

### What we know

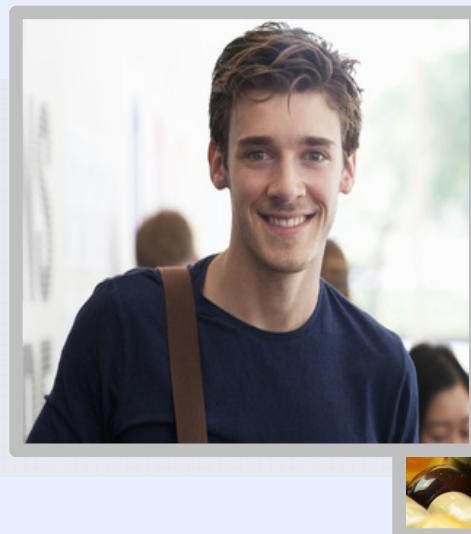
- People in the Few Conditions cluster have few conditions that they are currently suffering from, and few that they are worried about for the future.
- The conditions that they do have are mostly related to being overweight and fatigued, and for the most part they are not being addressed.
- These people fall across the age spectrum, are not very involved in the wellness category generally, and their health is quite good overall.

### What we think

- These people are not perfect—they have similar conditions to the Proactive Prevention group—but they are the relaxed counterpart; these people are content instead of being worried
- They may be a hard group to get to comply with a new health regimen without a more negative push
- **Their wellness goal** is to be healthy enough that they don't have any bothersome issues



## LIFESTYLE CLUSTER: No Conditions, Not Worried



*Do not suffer from or worry about any health conditions*



Respondents: 10%

VMS \$ spend: 7%

### What we know

- People in the No Conditions cluster are young, fit, and confident in their health because they have no conditions and are not worried about any future ones
- When they use VMS or functional products, they use multivitamins, probiotics, and things like protein bars and functional tea
- They are social people; they are influenced by and influencers among their friends, family, and social media

### What we think

- When this group uses VMS products, they are looking to maximize their already good health
- One way to get them more involved in the category would be to make using supplements more fun and more popular—a treat as opposed to a chore
- **Their wellness goal** is to be able to continue being carefree about their health for as long as possible



# Centrum volume is well distributed across Lifestyle Clusters through different sub-brands, especially among Chronic & Serious and Proactive Prevention



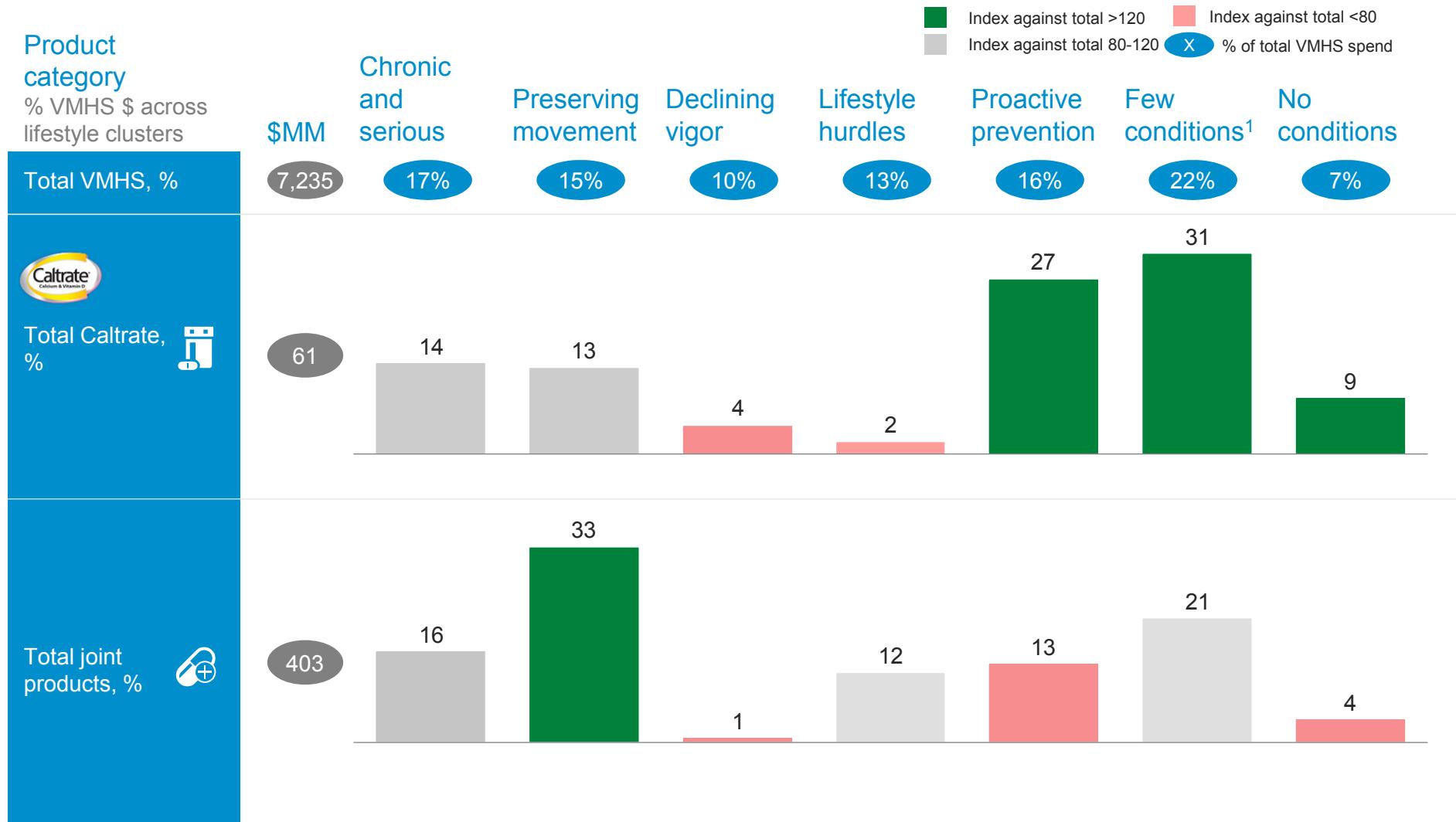
SOURCE: Pfizer Wellness survey December 2015, n=3069 respondents, weighted, IRI POS MULO dollar sales latest 52 weeks as of 10/2/2016

## Emergen-C strength lies with Proactive Prevention and Lifestyle Hurdles, aligning with design targets in portfolio architecture



SOURCE: Pfizer Wellness survey December 2015, n=3069 respondents, weighted, IRI POS MULC dollar sales latest 52 weeks as of 10/2/2016

# Caltrate current volume in Preserving Movement is on par with total VMHS, with huge opportunity to win with additional mobility products



1 Caltrate consumers in Few Conditions tend be women over 50 who were recommended to take calcium

SOURCE: Pfizer Wellness survey December 2015, n=3069 respondents, weighted, IRI POS MULC dollar sales latest 52 weeks as of 10/2/2016

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# Executive summary



**PCH can drive significant growth with manageable risk by positioning brands and innovating under a Hybrid portfolio architecture**

- Three critical enablers: target-specific and benefit-led **communication**, compelling product **innovation**, and sustained, disciplined **support**



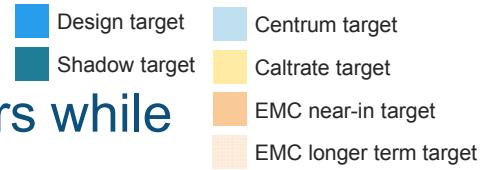
**Centrum** can grow by acting as a nutritional foundation with platforms targeted specifically for Lifestyle Clusters. Lifestyle Cluster platforms must be clearly communicated as the **primary organizing principle (not line extensions)** for a **differentiated master brand positioning** and supported by **compelling product innovation**. Equally critical is **sustained support, dedicated resources and retail execution**



**Caltrate** can unlock growth by defining a **relevant master brand positioning** encompassing current products and new innovation (largely identified through Global pipeline) **under platforms that target mobility: Bone Builder, Everyday Mobility, Movement Therapies and Post Movement Replenishment**



**Emergen-C** can accelerate its growth trajectory by **broadening its master brand positioning**, organizing current products and new innovation **under cohesive, higher order platforms: Immunity, Energy, and Rejuvenation**



# The portfolio architecture places brands on lifestyle clusters while leveraging Centrum's role in daily foundational regimen

Lifestyle clusters								
Needs	Product roles	Chronic and Serious	Declining Vigor	Preserving Movement	Lifestyle Hurdles	Proactive Prevention	Few Conditions	No Conditions
General	Daily foundational regimen	Optimal nutrition to renew and defend the interrelated heart, circulation, cholesterol management and blood sugar control systems		Optimal nutrition for your joints, bones, and muscles working well to keep you moving	Optimal nutrition designed for busy lifestyles to deliver on better sleep, more energy and stress relief	Optimal nutrition for active lifestyles to strengthen immunity, heart and joint/bone health		
Specific	Daily specific solution (e.g. EMC for general immunity boosting)	New brand Cholesterol bone/joint, diabetes, solutions connected to heart health		 Maintain/repair: bone, joint, muscle strength, mental sharpness/acute, oral health	 Regulate: sleep, stress, fatigue, digestive	Immune boost, energy		
	Episodic prevention (e.g. EMC for cold prevention)	Solutions to preemptively counteract temporary lifestyle changes (e.g. dietary, exercise, sleep, stress)		Joint, bone, muscle pain relief, acute energy for temporary conditions (e.g., cold weather)	Sleep aid for temporary conditions (e.g. Travel-C)	Energy boost, Sickness prevention pre-flu season		
	Episodic specific solution (e.g. EMZ for sleep aid )	In the moment solutions to counteract lifestyle deficiencies (deprioritized due to feasibility)		Joint, bone, muscle pain relief, acute energy	Acute energy/ sleep aid/ stress relief/ sickness recovery	Energy boost, sickness recovery		

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# Portfolio architecture reframes Centrum as a targeted multi-benefit platform across clusters

**Lifestyle clusters**

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# Portfolio recommendations: Centrum



In the Hybrid architecture, **Centrum** acts as a **nutritional foundation with platforms targeted specifically for different Lifestyle Clusters**. Capturing full growth potential requires **significant investment** to communicate **master brand** position and relevant **product reasons** why to **multiple clusters**



The **master brand** position must **define the role Centrum can play for each Lifestyle Cluster**, be clearly communicated, and supported by **targeted compelling product innovation**, to challenge the current perception of the brand as a generalist and **transition it to a foundational specialist**. The impact of the positioning should build over time with each product reason why



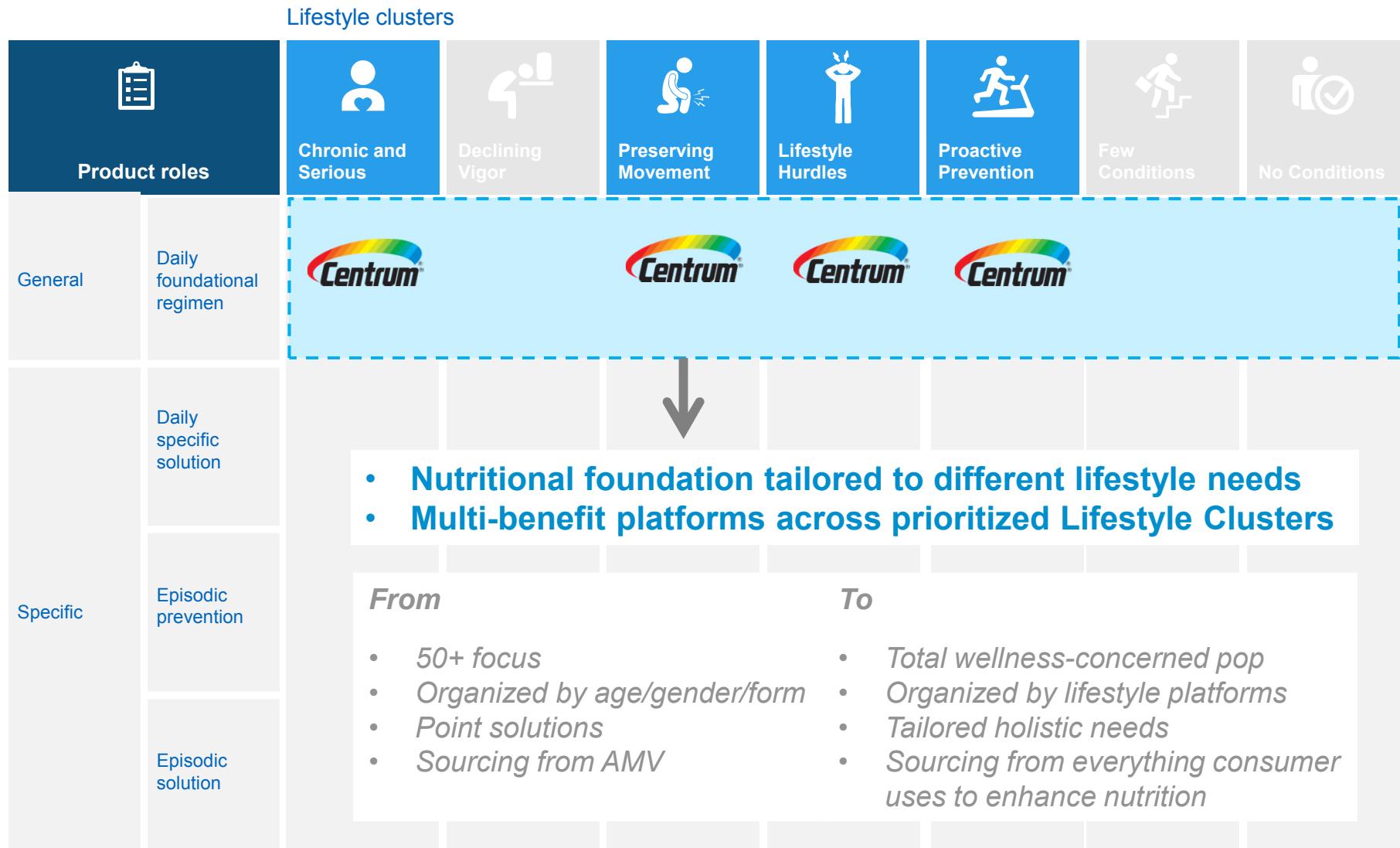
Multi-year roadmap to capture volume potential for Centrum includes:

- **Target-specific and benefit-led communication:** incorporate green & clean cues, form innovation (e.g. Omega, beauty gummy) in back half of 2017 for quick wins followed by relaunch of master brand communication with product news/featured products as support in 2018
- **Gradual evolution of current product positioning:** transition Silver and Base products from leading with demographic designations to leading with benefit descriptors. Deemphasize Silver in communication and packaging so Centrum is the clear brand equity
- **Compelling product innovation:** reposition Silver Multi + Omega and Probiotics and introduce Total Heart Defense and Life Balance in 2018, followed by Movement Support and Environmental Defense launch in 2019

Beyond this horizon, continue growth trajectory by **developing platforms against other three Lifestyle Clusters** and **building new form innovations** to heighten target relevance

# Portfolio Architecture: Centrum

 Prioritized clusters  
 Shadow clusters



Lifestyle-based wellness strategy leads transformation of a fragmented, product-oriented market into scalable, consumer-centric solutions

## How category is organized today

- **Lead with demographics** (gender, age)



Energy AMV  
with  
antioxidants

- **Product line extension** without clear connection to master brand



- Focus on single benefit **point solutions**



## How Lifestyle Cluster approach will be different tomorrow

- **Lead with lifestyle clusters** as primary organizing principle



- **Robust product platforms** connected to a compelling master brand story



- **Holistic product offerings** to address the **totality** of each cluster



Centrum master brand positioning and RTB must be clear to consumers with all product news / featured products targeted to a specific Lifestyle Cluster



 Master brand positioning	 Reason to believe
<p>Centrum is the brand that offers the <b>nutritional foundations specifically designed for the way you want to live</b></p>	<p>We are the <b>experts</b> in delivering the <b>best combination of nutrients</b> your mind and body <b>naturally needs</b> to achieve your <b>personal wellness goals</b></p>
<p><b>Rationale</b></p> <ul style="list-style-type: none"><li>▪ <b>Centrum/nutritional foundation:</b> provides foundational vitamins and minerals in conjunction with more tailored ingredients for each Lifestyle Cluster; linkage to Centrum's MV heritage (though not necessarily A to Zinc)</li><li>▪ <b>Specifically designed:</b> move from generalist to a more specialized solution</li><li>▪ <b>The way you want to live:</b> reinforces Centrum as specialist and establish reason for cluster-specific solutions</li></ul>	<ul style="list-style-type: none"><li>▪ <b>Experts:</b> builds on Centrum heritage of trust and expertise</li><li>▪ <b>Best combination of nutrients:</b> highlights need for complex, tailored solutions for different clusters</li><li>▪ <b>Naturally needs:</b> links our expertise to ability to develop solutions harmonious with your body; use Green &amp; Clean initially and later build with additional natural ingredient support</li><li>▪ <b>Personal wellness goals:</b> recognizes that clusters have different goals, needs, and motivations</li></ul>

The end-state brand architecture includes lifestyle cluster based platforms and Silver and Base; gender and form will continue to play a supporting role

## Centrum brand architecture overview

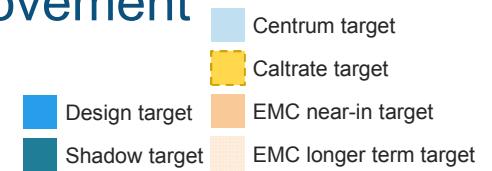
Design target	Chronic & Serious	Preserving Movement	Lifestyle Hurdles	Proactive Prevention	All lifestyle clusters
<b>Primary organizing principle:</b> Lifestyle cluster and condition bundle	 <b>Centrum TOTAL HEART DEFENSE</b>	 <b>Centrum MOVEMENT SUPPORT</b>	 <b>Centrum LIFE BALANCE</b>	 <b>Centrum ENVIRONMENTAL DEFENSE</b>	 
<b>Secondary organizing principle:</b> age, gender, form	 <b>Form</b>		 <b>Gender</b>		 <b>Age</b>  <b>Form</b>  <b>Gender</b> Maintain Adult/Men/ Women and general gummy as volume/shelf space warrants

Gender and form split as a tailored way of delivering higher order benefits, as long as the science supports differentiation

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# In the portfolio architecture, Caltrate targets Preserving Movement in both daily specific and episodic solutions



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# Portfolio recommendations: Caltrate



In the Hybrid architecture, Caltrate targets **Preserving Movement** as a driver for PCH growth, given **concentrated and large size of opportunity**, long term **growth prospects**, alignment with **global strategy and pipeline**, and **extendable brand equity**



To capture this opportunity, Caltrate must develop an identity as **the “go-to” brand providing differentiated and detailed mobility benefits** (beyond just plain calcium and distinct from ingredient solutions like glucosamine) across both daily specific and episodic solutions, under clear platforms of **Bone Builder, Everyday Mobility, Movement Therapies, and Post Movement Replenishment**



Multi-year Roadmap to capture the volume potential includes:

- **Target-specific and benefit-led communication:** relaunch of master brand communication with product news / featured products as support in 2018 under “move easily through your life” brand positioning
- **Compelling product innovation:** reposition Caltrate base under Bone Builder and introduce Everyday Mobility in 2018, followed by Post Movement Replenishment launching in 2019

Beyond this horizon, continue growth trajectory by **developing Movement Therapies platform** and building **new form innovations**

Caltrate master brand communication must be supported with product news / featured products that address the broader needs of Preserving Movement



Master brand positioning	Reason to believe
<p><b>Caltrate</b> is the brand that enables you to <b>move easily through your life</b></p>	<p>Supplies <b>specialized nourishment</b> for <b>optimal joint, bone and muscle movement every day</b></p>
Rationale	
<ul style="list-style-type: none"><li>▪ <b>Caltrate</b>: Brand has a foundation in calcium commonly understood by consumers, especially those with bone/joint concerns, to help ensure strong bones</li><li>▪ <b>Move easily</b>: articulation of main benefit sought by Preserving Movement cluster</li><li>▪ <b>Through your life</b>: to tangibly connote the ability to perform daily tasks and activities normally, today and over the longer term</li></ul>	<ul style="list-style-type: none"><li>▪ <b>Specialized nourishment</b>: targeted to specific areas of concern</li><li>▪ <b>Optimal joint, bone, and muscle</b>: the three areas both of special concern to the target, and medically connected to movement issues</li><li>▪ <b>Every day</b>: to encompass both the everyday formulas and episodic specific solutions; longer term, episodic prevention</li></ul>

# Contents

- **Integrated Wellness Growth Map**
- **Lifestyle Cluster details**
- **PCH portfolio application**
  - Overview
  - Centrum
  - Caltrate
  - **Emergen-C**
- **Appendix**

# In the portfolio architecture, Emergen-C targets Proactive Prevention, with Lifestyle Hurdles as a secondary target



Lifestyle clusters									
Needs	Product roles	Chronic and Serious	Declining Vigor	Preserving Movement	Lifestyle Hurdles	Proactive Prevention	Few Conditions	No Conditions	
General	Daily foundational regimen	Optimal nutrition to renew and defend the inter-related heart, circulation, cholesterol management and blood sugar control systems		Optimal nutrition for your joints, bones, and muscles working well to keep you moving	Optimal nutrition designed for busy lifestyles to deliver on better sleep, more energy and stress relief	Optimal nutrition for active lifestyles to strengthen immunity, heart and joint/bone health			
Specific	Daily specific solution (e.g. EMC for general immunity boosting)	New brand Cholesterol bone/joint, diabetes, solutions		Maintain/repair: bone, joint, muscle strength, mental sharpness/acute	Regulate: sleep, stress, fatigue, digestive	Immune boost, energy			
	Episodic prevention (e.g. EMC for cold prevention)	Solutions to preemptively counteract temporary lifestyle changes (e.g. dietary, exercise, sleep, stress)		Joint, bone, muscle pain relief, acute energy for temporary conditions (e.g., cold weather)	Sleep aid for temporary conditions (e.g., Travel-C)	Energy boost, Sickness prevention pre-flu season			
	Episodic specific solution (e.g. EMZ for sleep aid )	In the moment solutions to counteract lifestyle deficiencies (deprioritized due to feasibility)		Joint, bone, muscle pain relief, acute energy	Acute energy/ sleep aid/ stress relief/ sickness recovery	Energy boost, sickness recovery			

# Portfolio recommendations: Emergen-C



In the Hybrid architecture, Emergen-C targets **Proactive Prevention**, with **Lifestyle Hurdles** as a secondary target. The brand can grow by **sharpening positioning** of current products and new innovation under **three benefit platforms** of **Immunity**, **Energy**, and **Rejuvenation** supporting a **broader master brand positioning**



Multi-year roadmap Roadmap to capture volume potential includes:

- **Master brand communication that unites product platforms:** broaden positioning of Emergen-C as the brand that “powers your life” with product news / featured products as support
- **Repositioning of current products and innovation to align to platforms:**
  - **Immunity:** Drive differentiation of Core and Immune+ as daily and episodic solutions, respectively
  - **Energy:** Create distinct usage occasions of Energy+, hydration, and protein products as different ways to deliver energy
  - **Rejuvenation:** EMZ as Nighttime Rejuvenator, with companion Daytime Rejuvenator innovation

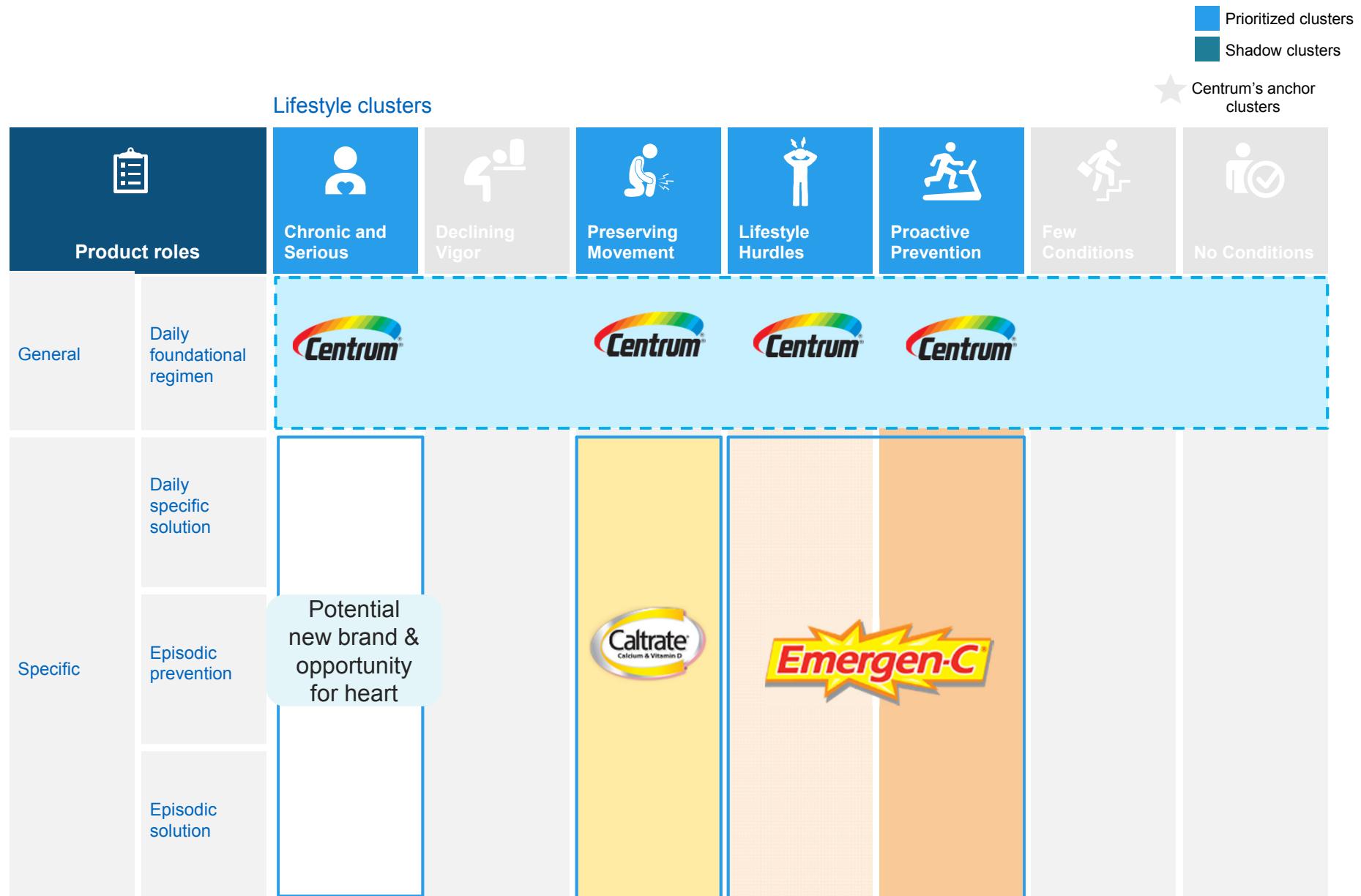
Beyond this horizon, continue growth trajectory by **developing new platform benefit areas** and building **new form innovations (e.g. shots)**

Master brand communication must be clear and supported with product news/featured products that address needs of key clusters



Master brand positioning	Reason to believe
<p><b>Emergen-C</b> is the catalyst that helps you <b>power your life</b></p>	<p><b>Dynamic</b> products that <b>keep you at your best</b>, building and boosting your <b>immunity</b>, and providing <b>energy</b> and <b>rejuvenation</b></p>
<p><b>Rationale</b></p> <ul style="list-style-type: none"><li>▪ <b>Emergen-C:</b> full name to take advantage of both the immediate action connoted by “emergency” (and visible in the effervescence) and the power of Vitamin C</li><li>▪ <b>Power:</b> tie the activity and energy of the targets’ lives and personalities with the strength of the brand’s product performance</li><li>▪ <b>Your life:</b> priority targets view their lifestyles (as opposed to age or genetics) as the thing to manage</li></ul>	<ul style="list-style-type: none"><li>▪ <b>Dynamic:</b> Multi-sensorial product cues signal efficacy to consumers and supports “power” of brand</li><li>▪ <b>Keep you at your best:</b> targets are optimistic about their lives, just want to get/stay on the most positive side of their health</li><li>▪ <b>Immunity, energy, rejuvenation:</b> delivers against the three keys to being at your best—protection, during the day needs, and rejuvenation</li></ul>

# Total Portfolio Architecture



## Contents

- **Integrated Wellness Growth Map**
- **Lifestyle Cluster details**
- **PCH portfolio application**
- **Appendix**

## CHRONIC AND SERIOUS

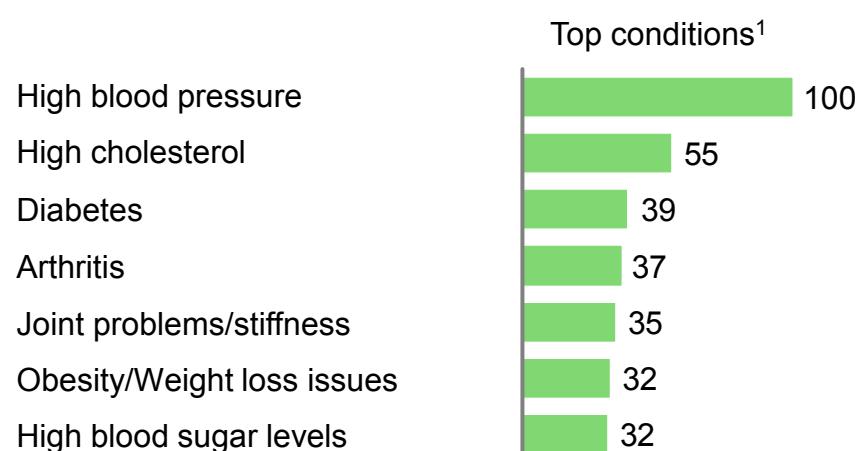
# Chronic and serious people suffer from and treat numerous serious, interrelated conditions

No skew  
Index >120  
Index <80

### Chronic and serious people currently suffer from and actively treat heart and metabolic syndrome conditions

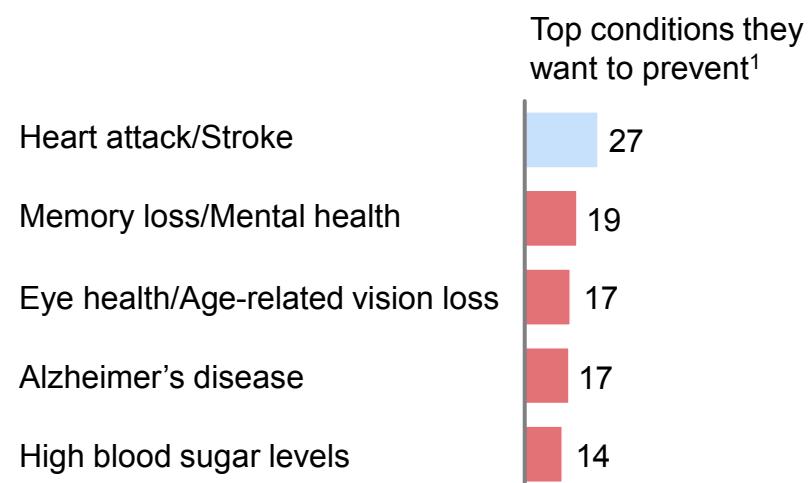
#### On average, they have 6 current conditions...

% consumers



#### On average, they want to prevent 3 conditions...

% consumers



#### ...and they treat 4 of them

# of current conditions



#### ...and they address 1 of them

# of conditions wish to prevent



<sup>1</sup> Top conditions by %

## CHRONIC AND SERIOUS

**They are motivated to treat their conditions by their doctors, resulting in them primarily using Rx medications**

No skew  
Index >120  
Index <80

### What they look for...

#### Need States

% occasions

Ongoing condition management	13
Skeletal strengthening	11
Doctor recommended	18
Sickness recovery and prevention	14
Ensuring complete nutrition	13
Protecting against aging	11
Targeting the best of me	15
Energizing body and mind	5

#### Benefits<sup>1</sup>

- Doctor recommended
- Is part of my regular routine
- Helps me protect against serious or chronic illnesses
- Prolongs my life
- Contributes to my overall wellbeing

### What they're using...

#### Top general treatments<sup>1</sup>

% consumers

Rx/OTC	60
Exercise	33
Vitamins	27
Food	25
Supplements	17

#### Medication and supplement use

% of consumers

Rx/OTC only	46
VMS Only	19
Both VMS and Rx	21
Only Other	15

#### Top VMS groups<sup>1</sup>

Avg 3.6 groups % consumers

Multivitamins/Multiminerals	64
Single Letter Vitamins	58
Heart Supplements	49
Mineral Supplements	42
Digestive Supplements	31

#### Top VMS Products<sup>1</sup>

Avg 5.8 products % consumers use 2-4+ times/week

Vitamin D	33
Fish oil	28
Multivitamin (50+)	25
Omega 3 fatty acids	14
CoEnzyme Q10	9
Lutein	8
Krill oil	8

#### Top Functional product groups<sup>1</sup>

Avg 0.6 groups % consumers

Fortified Beverages	22
Protein Bars	21
Nutritional & Sports Products	16

#### Top Functional Products<sup>1</sup>

Avg 0.8 products % consumers use 2-4+ times/week

Protein Bars	16
Water	13
Juice	12

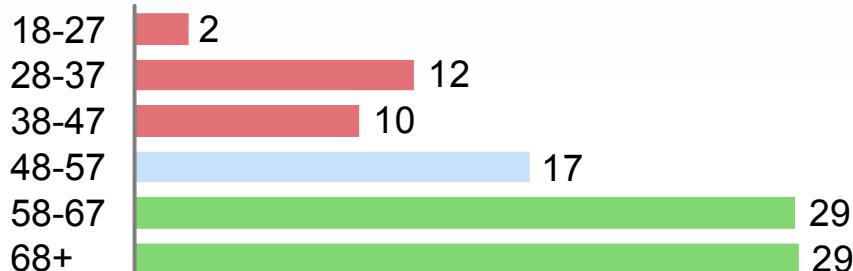
<sup>1</sup> Top by index and %

## CHRONIC AND SERIOUS

**The Chronic and serious people tend to be older, male, and more likely to be retired**

- No skew
- Index >120
- Index <80

### Age, % of respondents

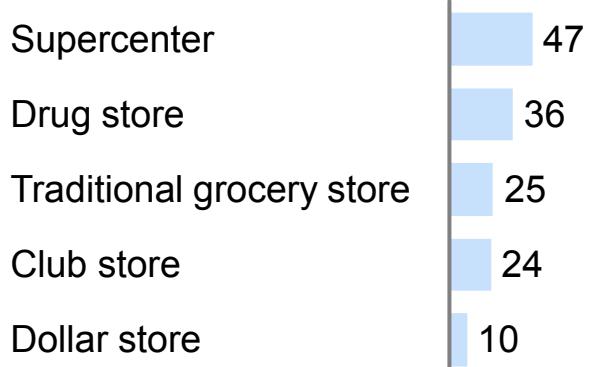


### Gender, % of respondents



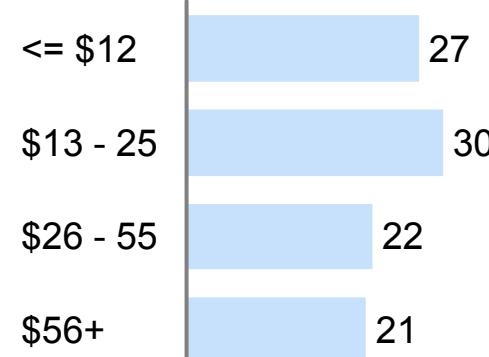
### Where they shop

% of respondents



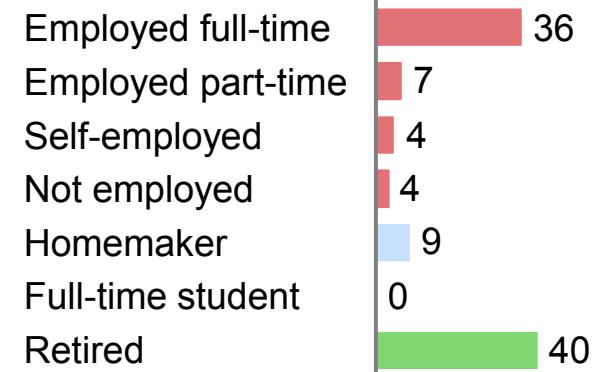
### VMS Spend/month,

% of respondents



### Employment

% of respondents



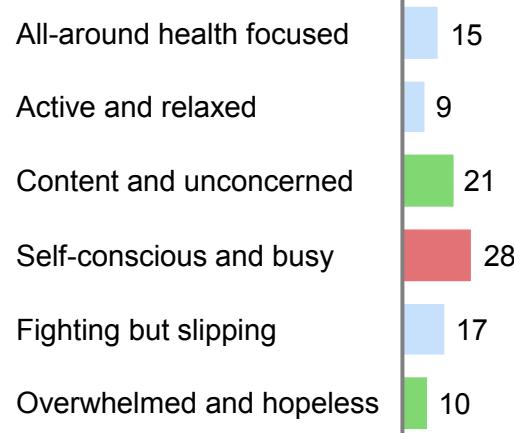
## CHRONIC AND SERIOUS

# Chronic and serious people consider themselves somewhat healthy; they focus on being content day to day

No skew  
Index >120  
Index <80

### Attitudinal Segments

% of respondents

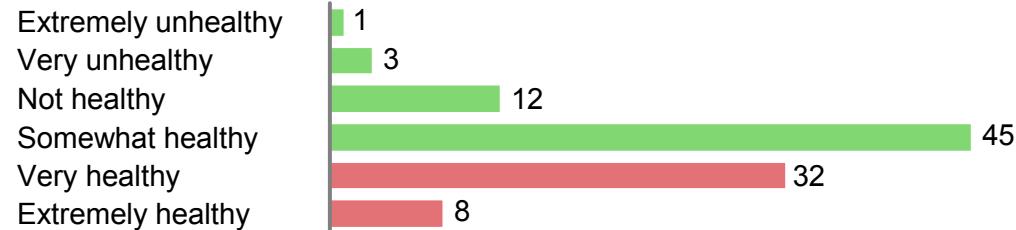


### Top Statements<sup>1</sup>

- I consider myself to be living a healthy lifestyle
- I focus on getting the most out of every day
- Exercise is an essential part of my day
- I avoid eating too many high fat foods
- I am happy with my current life-stage

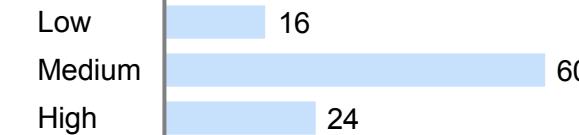
### How they see their general wellness

% of respondents



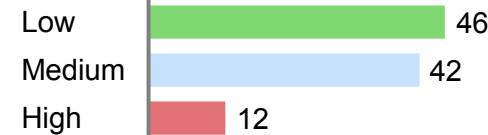
### Quality of sleep

% of respondents



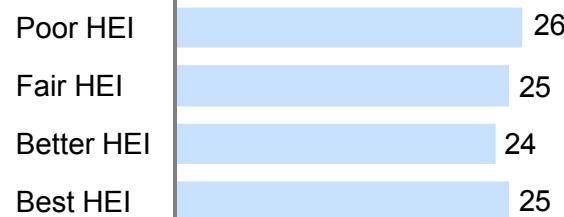
### Level of stress

% of respondents



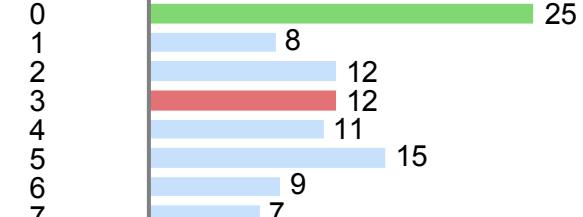
### Quality of diet

% of respondents



### Frequency of exercise/week

% of respondents

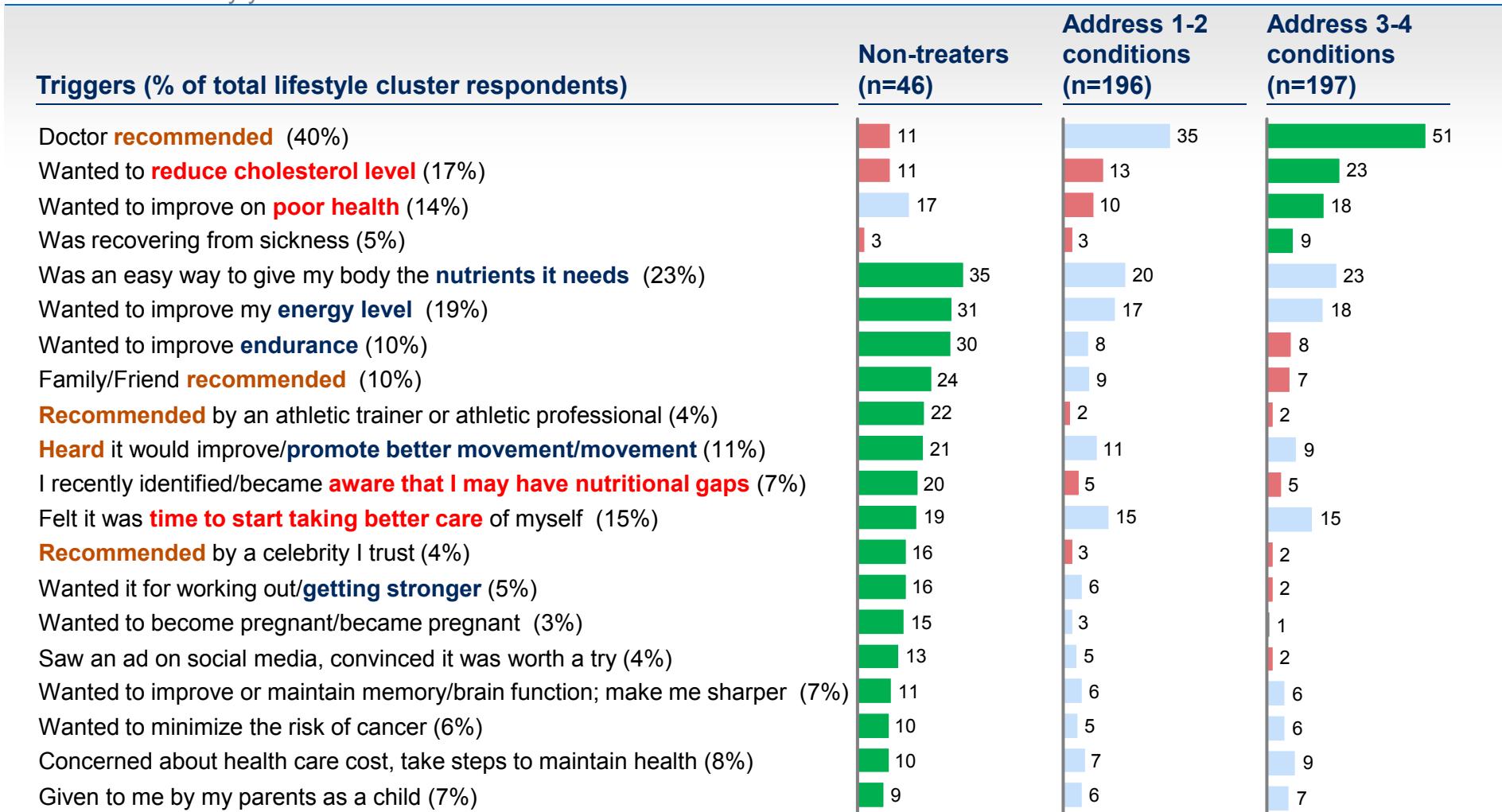


<sup>1</sup> Top by index and %

## Successful solutions must convey tangible benefits of better nutrition, focusing on energy, strength, and movement; social influencers are key triggers

Triggers for starting to use VMS, % of respondents

Q16. Thinking back to when you first started taking vitamins, minerals, herbs, or supplements, which of the following, if any, were reasons why you started?



## PRESERVING MOVEMENT

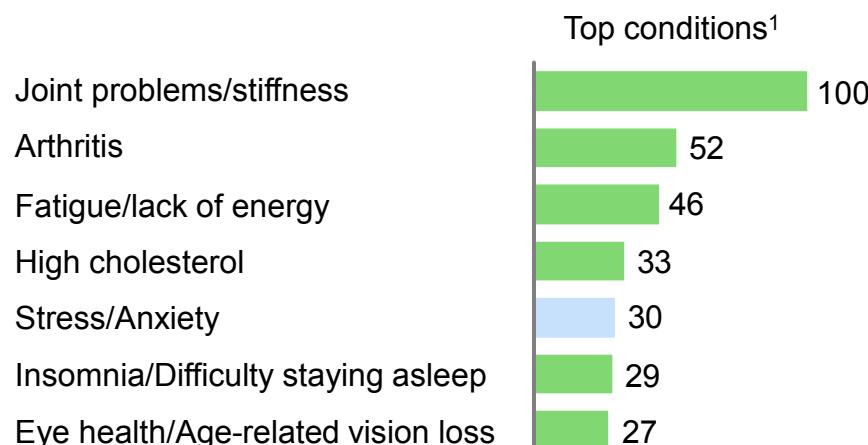
# Preserving movement people are suffering from joint issues and the signs of aging

No skew  
Index >120  
Index <80

*Preserving movement people tend to treat most of the conditions they currently suffer from*

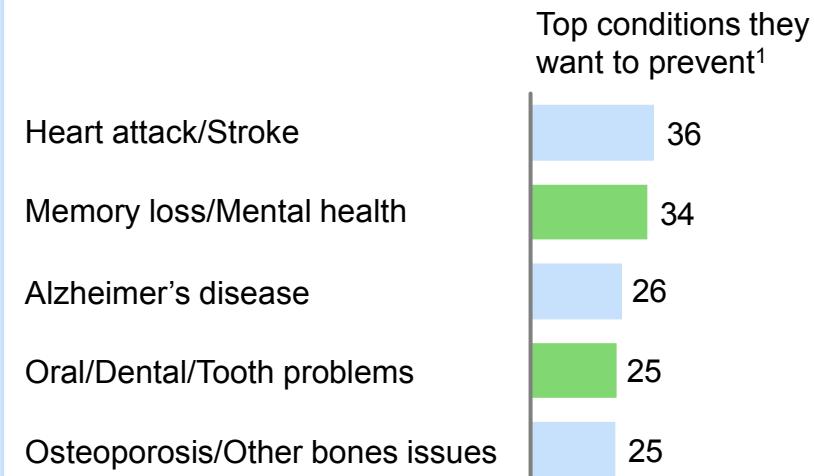
On average, they have 6 current conditions...

% consumers



On average, they want to prevent 5 conditions...

% consumers



...and they treat 5 of them

# of current conditions



...and they address 1 of them

# of conditions wish to prevent



1 Top by index

SOURCE: Pfizer Wellness survey December 2015, n=5634 occasions, weighted by usage frequency, IRI and Euromonitor multi-outlet VMS and Food & Beverage data for the past 12 months

McKinsey & Company | 47

# Preserving movement people use supplements to keep themselves active despite their joint issues

No skew  
Index >120  
Index <80

## What they look for...

### Need States

% occasions

Ongoing condition management	13
Skeletal strengthening	14
Doctor recommended	12
Sickness recovery and prevention	14
Ensuring complete nutrition	11
Protecting against aging	10
Targeting the best of me	18
Energizing body and mind	8

### Benefits<sup>1</sup>

- Helps me protect against serious or chronic diseases
- Helps me gain bone strength
- Helps me be productive
- Gives me more endurance
- Contributes to my overall well-being

## What they're using...

### Top general treatments<sup>1</sup>

% consumers

Exercise	45
Supplements	36
Vitamins	35
Over the counter medication	24
Alternative care	12

### Medication and supplement use

% of consumers

VMS Only	34
Rx/OTC only	25
Both VMHS and Rx	21
Only Other	20

### Top VMS groups<sup>1</sup>

Avg 4.2 groups % consumers

Multivitamins	72
Single Letter Vitamins	61
Mineral Supplements	50
Heart Supplements	40
Joint Supplements	40

### Top VMS Products<sup>1</sup>

Avg 5.8 products % consumers use 2-4+ times/week

Vitamin D	34
Calcium	30
Glucosamine	29
Multivitamin (50+)	28
Magnesium	20
Chondroitin	19

### Top Functional product groups<sup>1</sup>

Avg 0.9 groups % consumers

Protein Bars	33
Nutritional & Sports Products	29
Fortified Beverages	28

### Top Functional Products<sup>1</sup>

Avg 0.8 products % consumers use 2-4+ times/week

Protein Bars	21
Fortified Water	17
Fortified Juice	16

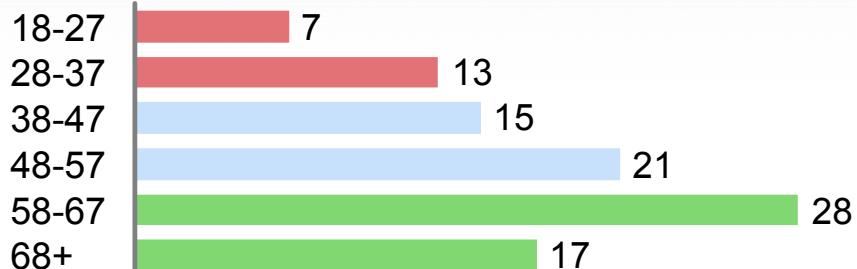
<sup>1</sup> Top by index and %

## PRESERVING MOVEMENT

**They tend to be over 50, moving towards or already in retirement**

No skew
Index >120
Index <80

### Age, % of respondents



### Gender, % of respondents



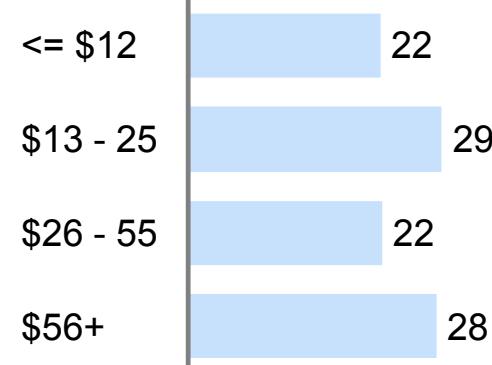
### Where they shop

% of respondents



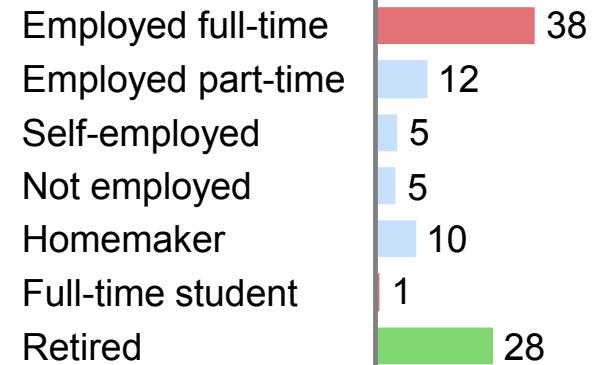
### VMS Spend/month,

% of respondents



### Employment

% of respondents



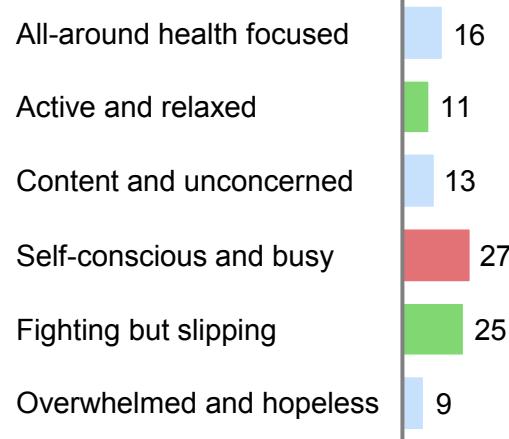
## PRESERVING MOVEMENT

# Preserving movement people are of average health — they don't sleep well, but their diets are good

No skew  
Index >120  
Index <80

### Attitudinal Segments

% of respondents

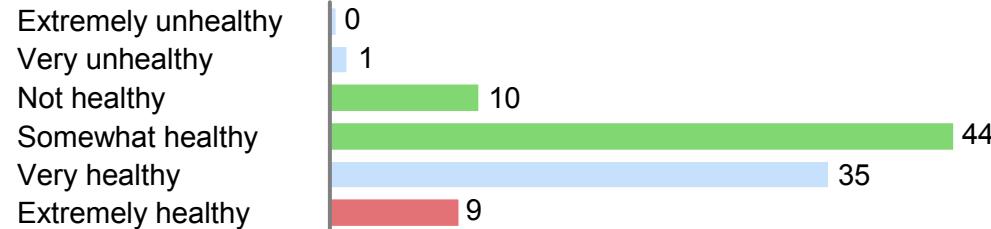


### Top Statements<sup>1</sup>

- I have had a health scare that was a "wake up call"
- I take steps to avoid sugar
- I make sure I don't eat too many high fat foods
- I take MV to balance out my diet
- I don't stress over my nutrition or fitness level

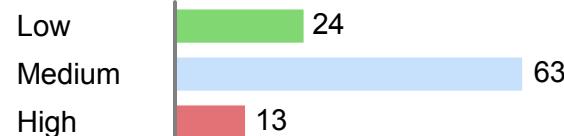
### How they see their general wellness

% of respondents



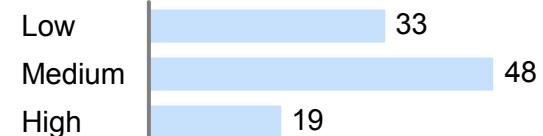
### Quality of sleep

% of respondents



### Level of stress

% of respondents



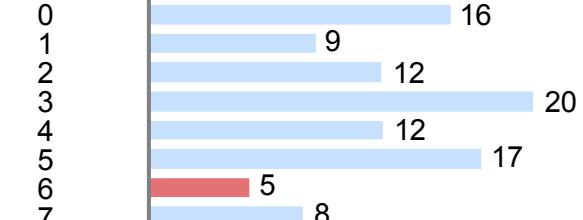
### Quality of diet

% of respondents



### Frequency of exercise/week

% of respondents

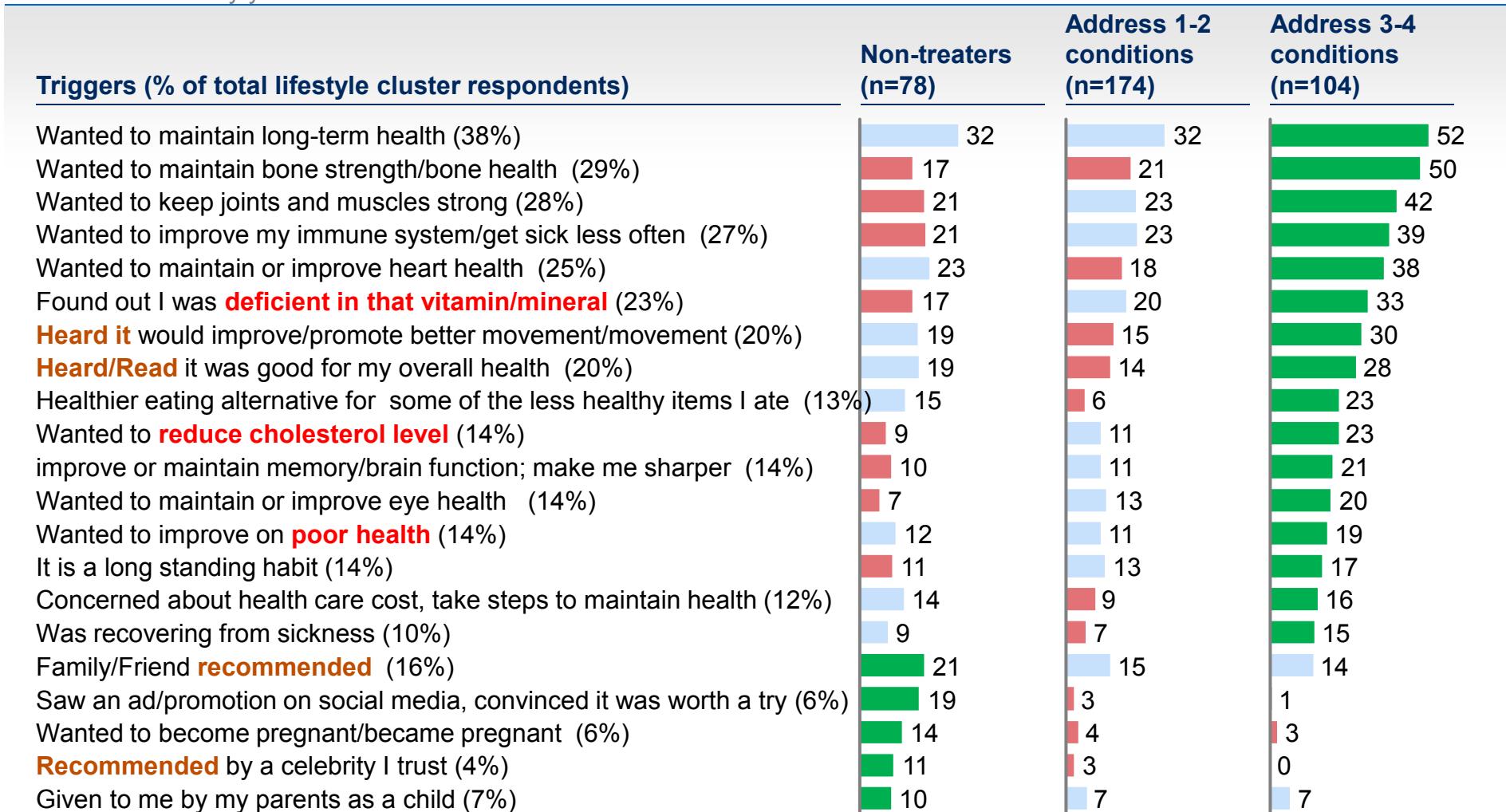


<sup>1</sup> Top by index and %

## Treaters are motivated by the desire to maintain bone/joint health while non-treaters are influenced by word of mouth and marketing triggers

### Triggers for starting to use VMS

Q16. Thinking back to when you first started taking vitamins, minerals, herbals, or supplements, which of the following, if any, were reasons why you started?



## DECLINING VIGOR

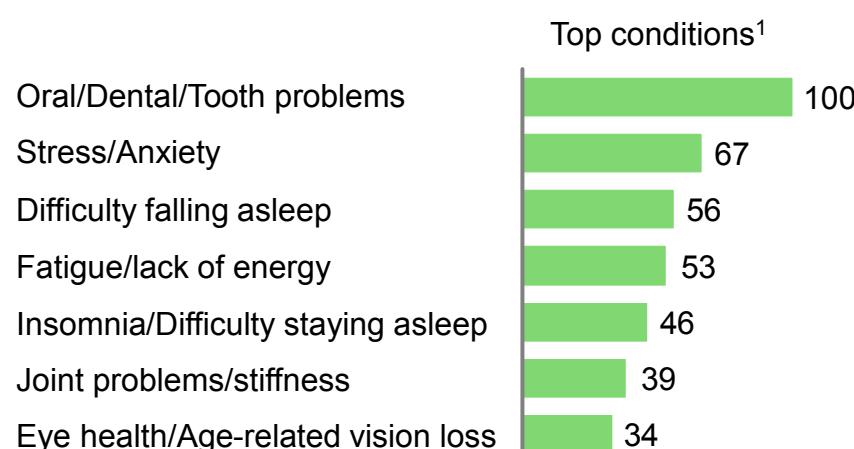
# The Declining vigor people suffer from a wide array of conditions associated with aging

No skew  
Index >120  
Index <80

**The Declining vigor archetype has day-to-day issues, but is also concerned about preventing issues related to aging**

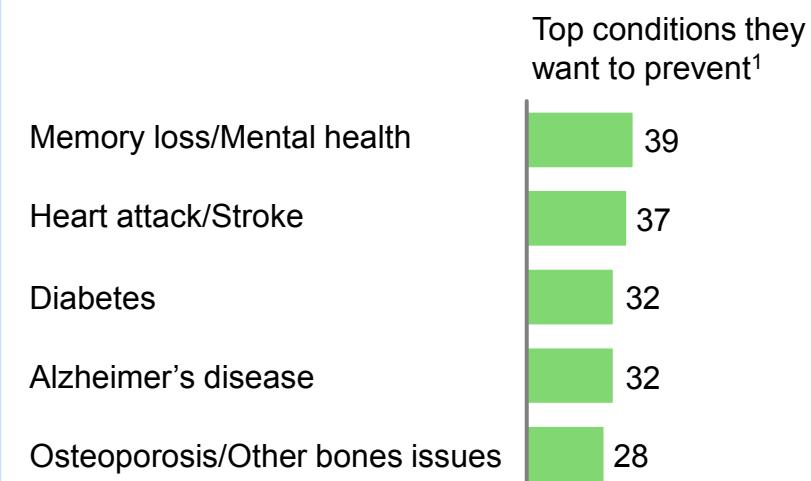
**On average, they have 8 current conditions...**

% consumers



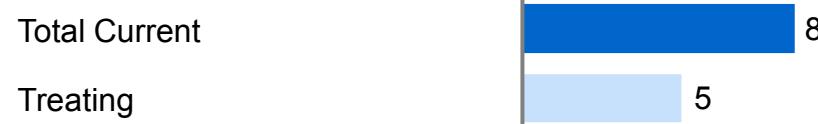
**On average, they want to prevent 6 conditions...**

% consumers



**...and they treat 5 of them**

# of current conditions



**...and they address 1 of them**

# of conditions wish to prevent



<sup>1</sup> Top conditions by %

SOURCE: Pfizer Wellness survey December 2015, n=5634 occasions, weighted by usage frequency

McKinsey & Company | 52

## DECLINING VIGOR

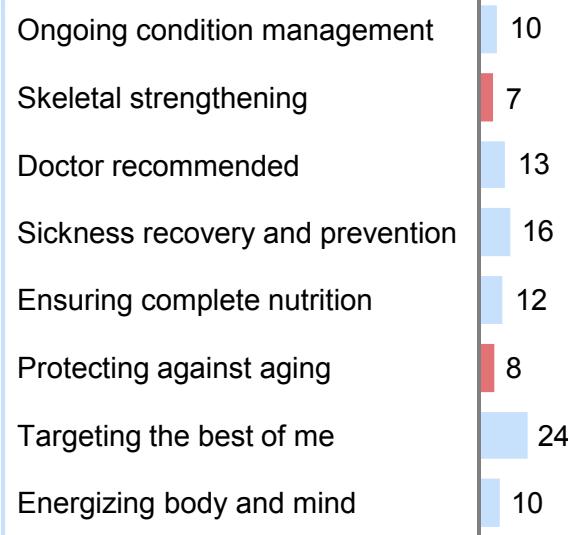
# The Declining vigor people tend to use dietary supplements as their first choice of treatment

No skew  
Index >120  
Index <80

## What they look for...

### Need States

% occasions



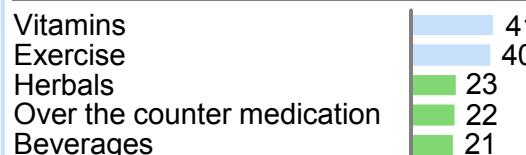
### Benefits<sup>1</sup>

- Helps me improve after sickness
- Refreshes me
- Helps me fall asleep/sleep better
- Improves my mental sharpness/acute
- Helps me refocus
- Helps me stay healthy while losing weight

## What they're using...

### Top general treatments<sup>1</sup>

% consumers



### Top VMS groups<sup>1</sup>

Avg 4.2 groups % consumers



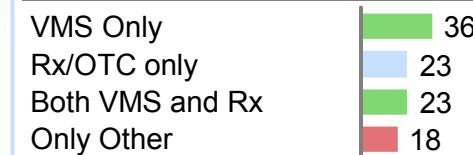
### Top Functional product groups<sup>1</sup>

Avg 1.1 groups % consumers



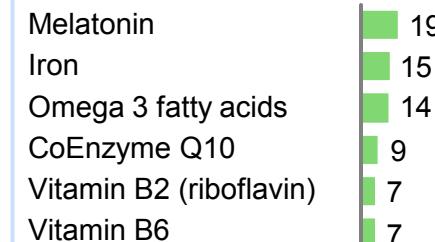
### Medication and supplement use

% of consumers



### Top VMS Products<sup>1</sup>

Avg 5.9 products % consumers use 2-4+ times/week



### Top Functional Products<sup>1</sup>

Avg 1.5 products % consumers use 2-4+ times/week



<sup>1</sup> Top by index and %

SOURCE: Pfizer Wellness survey December 2015, n=5634 occasions, weighted by usage frequency

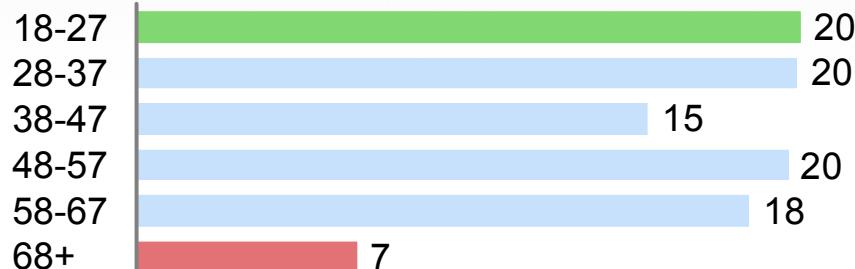
McKinsey & Company | 53

## DECLINING VIGOR

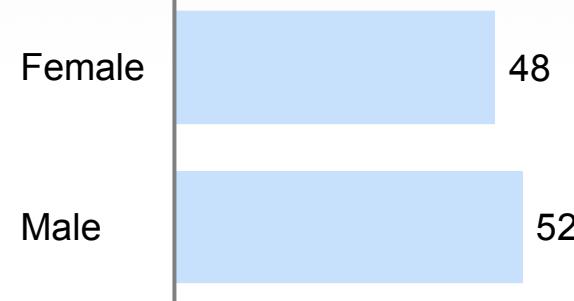
# The Declining vigor people fall into a wide range of ages

█ No skew  
█ Index >120  
█ Index <80

### Age, % of respondents



### Gender, % of respondents



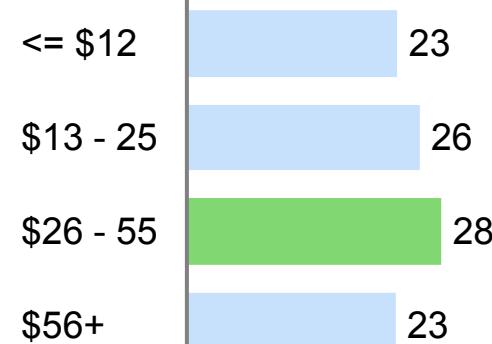
### Where they shop

% of respondents



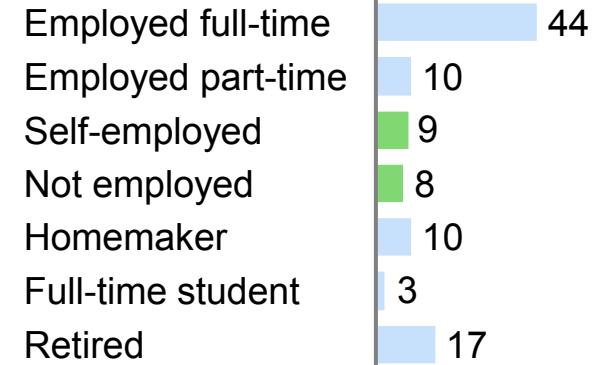
### VMS Spend/month,

% of respondents



### Employment

% of respondents



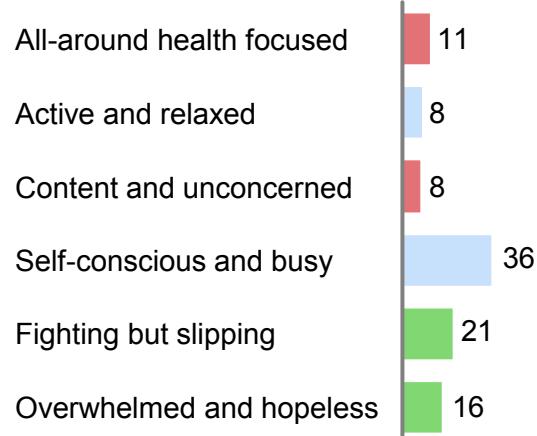
## DECLINING VIGOR

# Declining vigor people recognize that their high stress, poor sleep, and poor diet lifestyles aren't healthy

No skew  
Index >120  
Index <80

### Attitudinal Segments

% of respondents

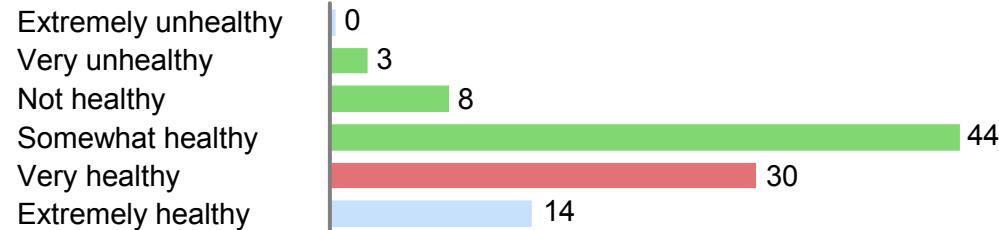


### Top Statements<sup>1</sup>

- Fits easily into my daily routine
- I focus on getting the most out of every day
- I make sure I don't eat too many high fat foods
- Maintaining a spiritual balance is important to me
- Exercise is an essential part of my day

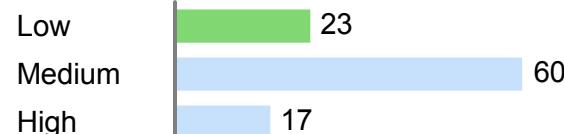
### How they see their general wellness

% of respondents



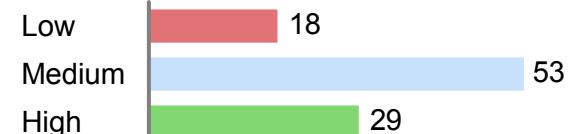
### Quality of sleep

% of respondents



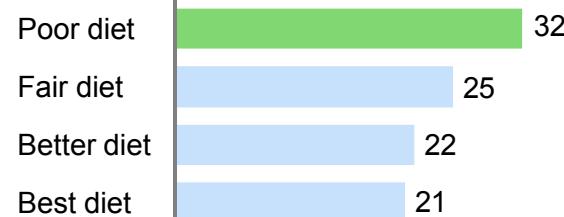
### Level of stress

% of respondents



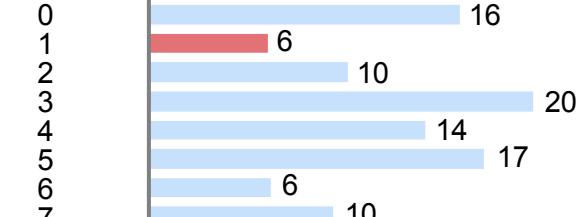
### Quality of diet

% of respondents



### Frequency of exercise/week

% of respondents

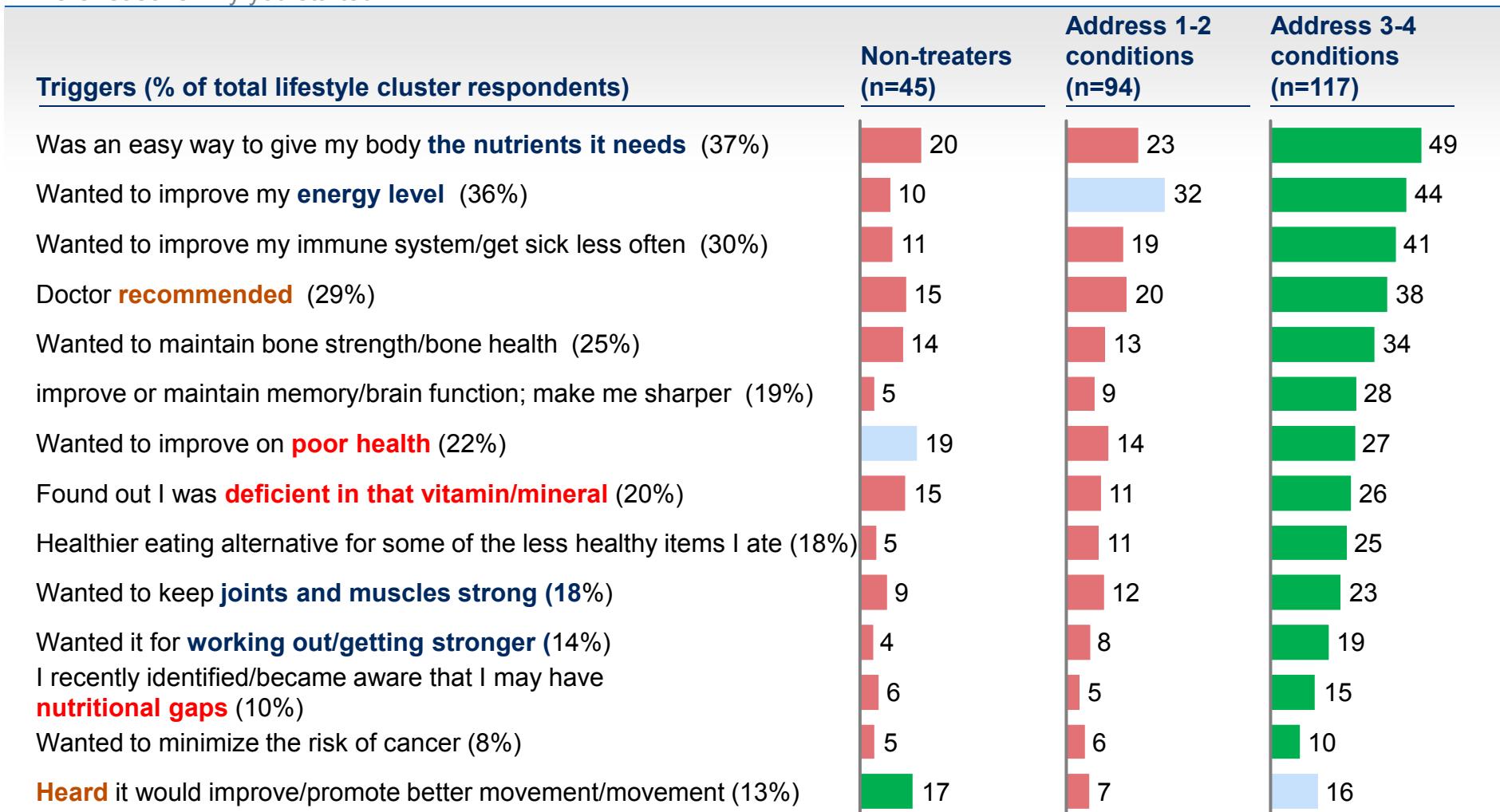


<sup>1</sup> Top by index and %

## Getting nutrients, improving energy level, and boosting immunity are top reasons for treaters to use VMS

### Triggers for starting to use VMS

Q16. Thinking back to when you first started taking vitamins, minerals, herbals, or supplements, which of the following, if any, were reasons why you started?



## LIFESTYLE HURDLES

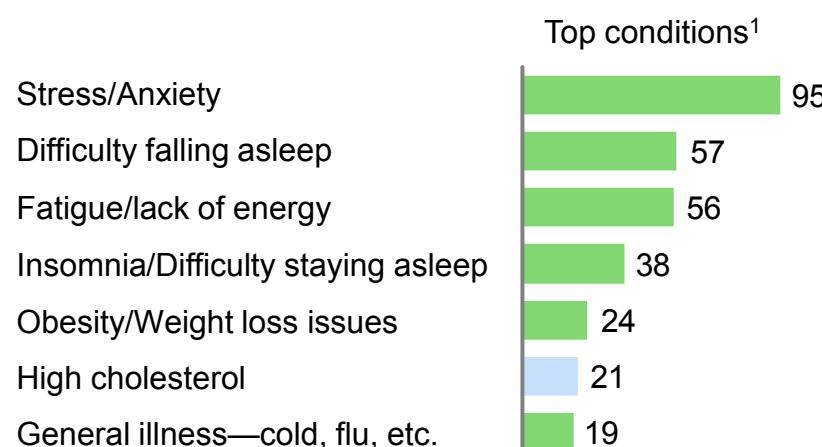
# Lifestyle Hurdles people suffer from stress and anxiety, which in turn exacerbate many other conditions

No skew  
Index >120  
Index <80

While the Lifestyle Hurdles people currently suffer from day-to-day annoyances, they are concerned about preventing more severe conditions as well as those connected with aging

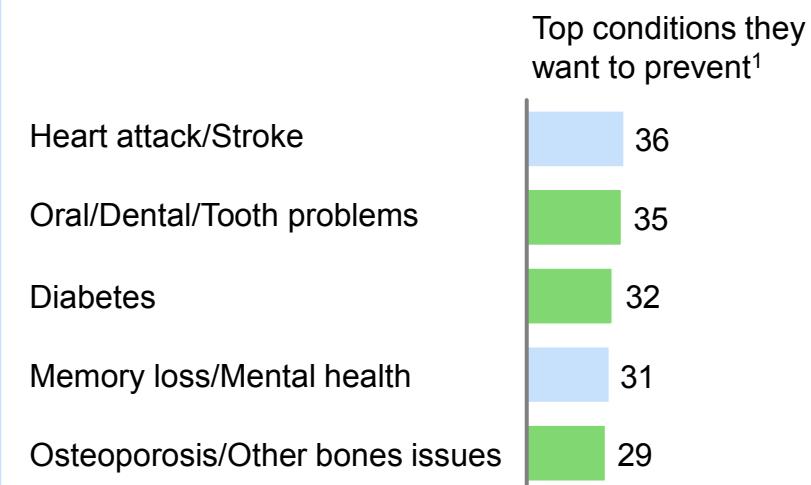
### On average, they have 5 current conditions...

% consumers



### On average, they want to prevent 7 conditions...

% consumers



### ...and they treat 3 of them

# of current conditions



### ...and they address 1 of them

# of conditions wish to prevent



<sup>1</sup> Top conditions by %

## LIFESTYLE HURDLES

# Lifestyle Hurdles people needs revolve around optimizing their daily lives, often through VMS

No skew  
Index >120  
Index <80

## What they look for...

### Need States

% occasions

Ongoing condition management	9
Skeletal strengthening	9
Doctor recommended	11
Sickness recovery and prevention	14
Ensuring complete nutrition	11
Protecting against aging	8
Targeting the best of me	27
Energizing body and mind	11

### Benefits<sup>1</sup>

- Makes me feel healthy
- Helps me start the day
- Gives me sustainable energy
- Helps me relax
- Refreshes me
- Helps me fall asleep/sleep better

## What they're using...

### Top general treatments<sup>1</sup>

% consumers

Vitamins	44
Exercise	43
Herbals	22
Beverages	18
Alternative care	12

### Medication and supplement use

% of consumers

VMS Only	35
Only Other	25
Rx/OTC only	21
Both VMS and Rx	19

### Top VMS groups<sup>1</sup>

Avg 3.9 groups

% consumers

Multivitamins	68
Single Letter Vitamins	54
Mineral Supplements	45
Sleep Supplements	41
Immune Support	35

### Top VMS Products<sup>1</sup>

Avg 5.4 products

% consumers use  
2-4+ times/week

Probiotics	24
Melatonin	22
Multivitamin (Women)	21
Magnesium	19
Vitamin C based supplement	17
Vitamin B12	16

### Top Functional product groups<sup>1</sup>

Avg 1.1 groups

% consumers

Protein Bars	41
Fortified Beverages	36
Nutritional & Sports Products	35

### Top Functional Products<sup>1</sup>

Avg 1.6 products

% consumers use  
2-4+ times/week

Fortified Juice	22
Fortified Tea	18
Protein powders	16

<sup>1</sup> Top by index and %

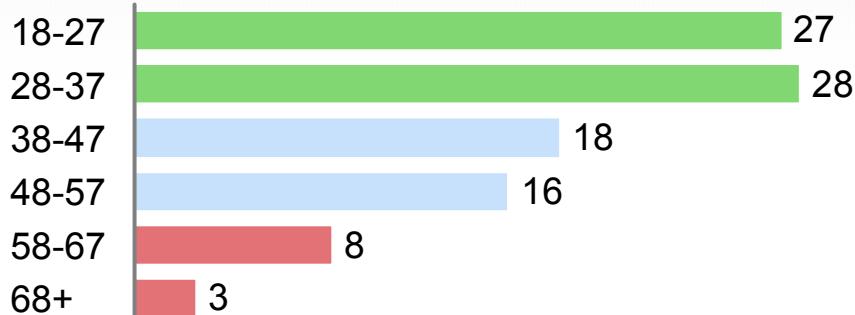
## LIFESTYLE HURDLES

**Lifestyle hurdles people skew heavily towards young women, a higher percentage of whom are not fully employed**

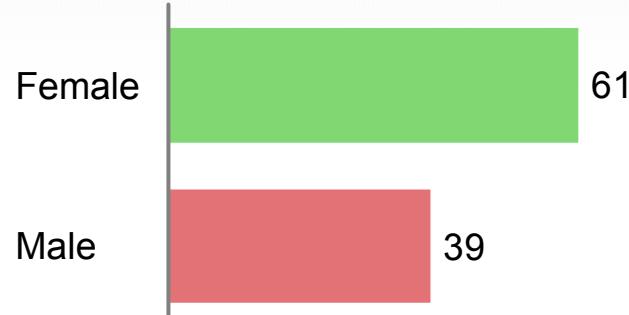


No skew  
Index >120  
Index <80

### Age, % of respondents



### Gender, % of respondents



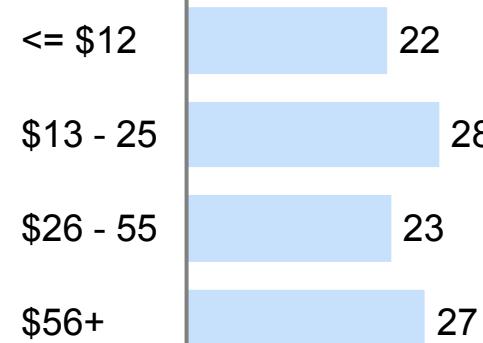
### Where they shop

% of respondents



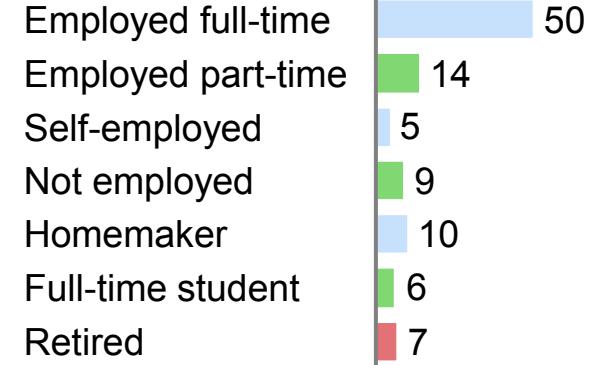
### VMS Spend/month,

% of respondents



### Employment

% of respondents



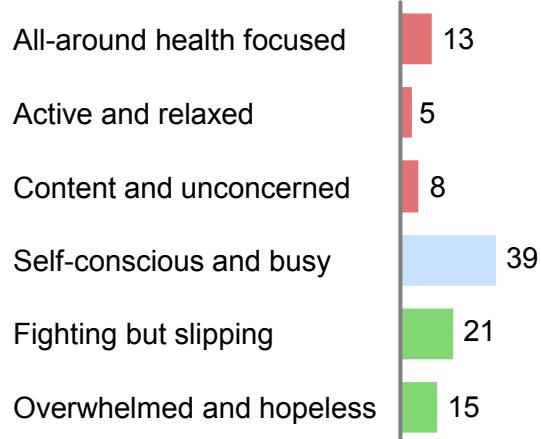
## LIFESTYLE HURDLES

# Lifestyle Hurdles people tend to be busy and overwhelmed, and they don't get high quality sleep

No skew  
Index >120  
Index <80

### Attitudinal Segments

% of respondents

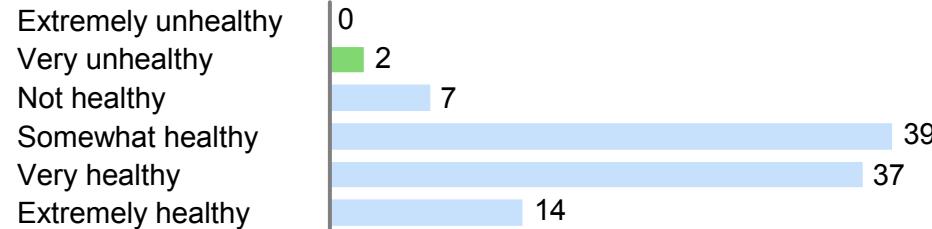


### Top Statements<sup>1</sup>

- I would purchase more organic and natural products if they were less expensive
- My stress level has a negative impact on my daily life
- Health and wellness are important to me, but it can be overwhelming do everything I should
- My life is too hectic/stressful

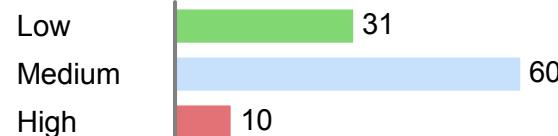
### How they see their general wellness

% of respondents



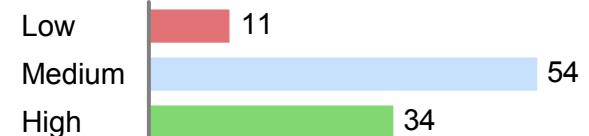
### Quality of sleep

% of respondents



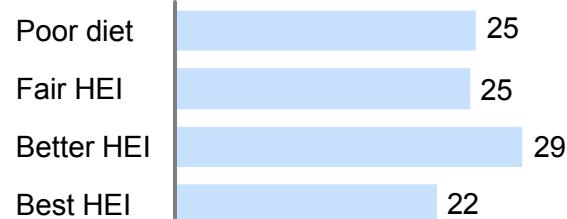
### Level of stress

% of respondents



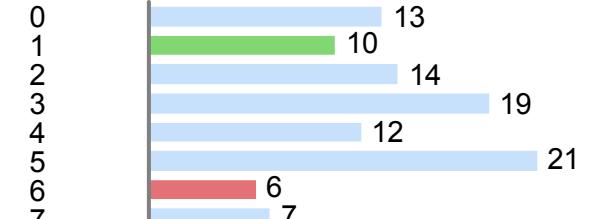
### Quality of diet

% of respondents



### Frequency of exercise/week

% of respondents

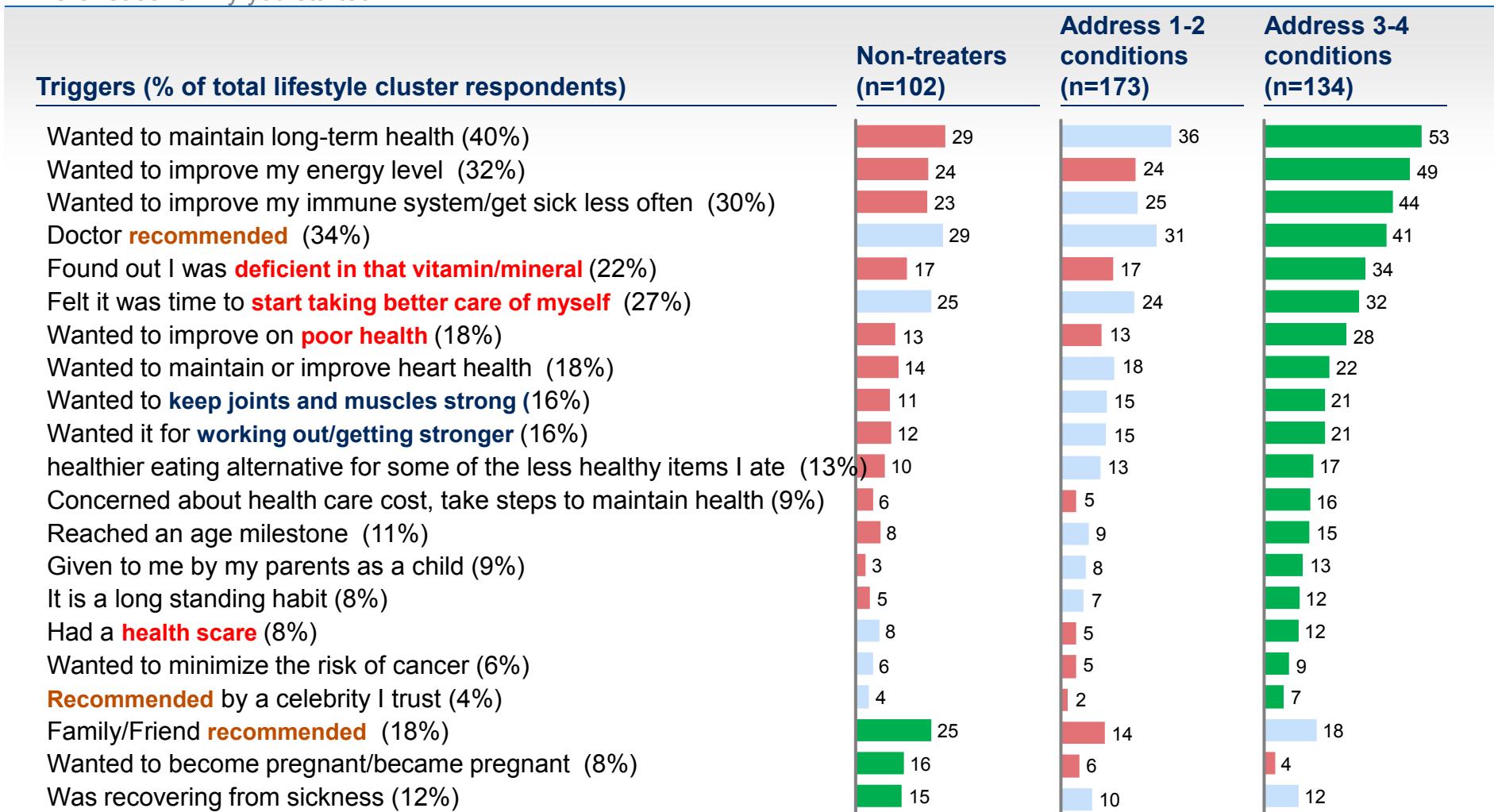


<sup>1</sup> Top by index and %

## Treaters are motivated by the desire to maintain long-term health, non-treaters are nudged by friends' recommendations

### Triggers for starting to use VMS

Q16. Thinking back to when you first started taking vitamins, minerals, herbals, or supplements, which of the following, if any, were reasons why you started?



## PROACTIVE PREVENTION

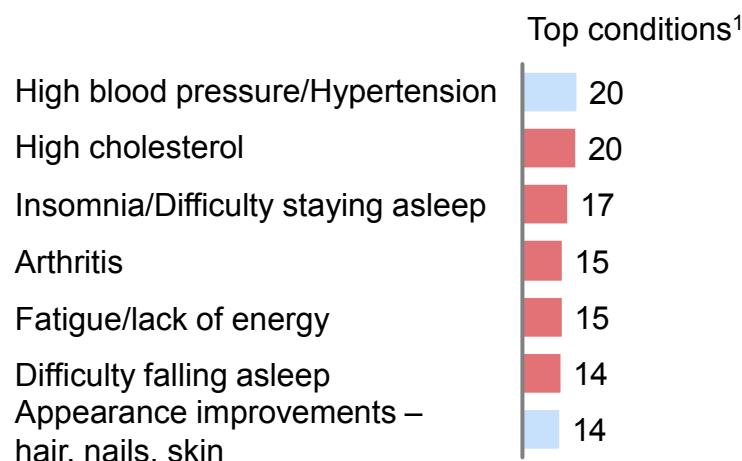
# Proactive Prevention people tend to have few current conditions, but they are interested in preventing many

No skew  
Index >120  
Index <80

**Proactive Prevention people might have serious conditions, but all of them are concerned about preventing general illness on top of serious aging-related issues**

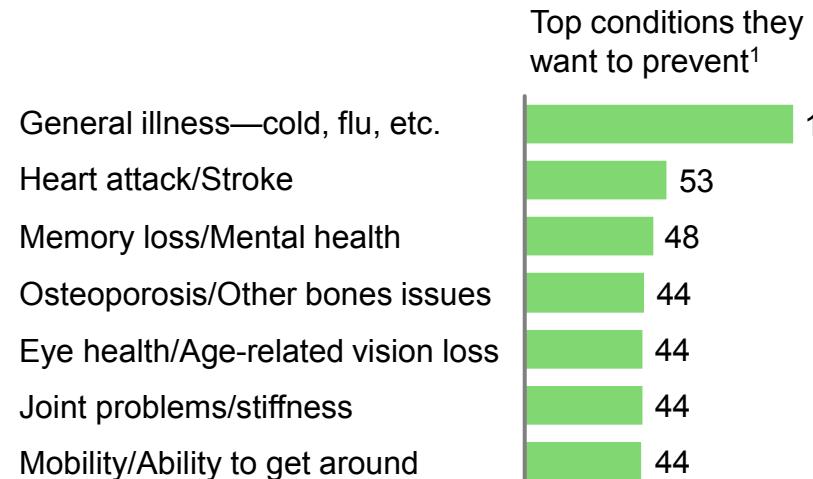
### On average, they have 3 current conditions...

% consumers



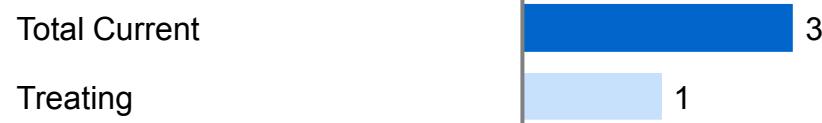
### On average, they want to prevent 10 conditions...

% consumers



### ...and they treat 1 of them

# of current conditions



### ...and they address 1 of them

# of conditions wish to prevent



<sup>1</sup> Top conditions by %

## PROACTIVE PREVENTION

# Proactive prevention people tend to take a whole lifestyle approach to wellness, using exercise, diet, and VMS

No skew  
Index >120  
Index <80

## What they look for...

### Need States

% occasions

Ongoing condition management	11
Skeletal strengthening	9
Doctor recommended	10
Sickness recovery and prevention	21
Ensuring complete nutrition	12
Protecting against aging	9
Targeting the best of me	17
Energizing body and mind	10

### Benefits<sup>1</sup>

- Helps support my immune system
- Replenishes me
- Gives me more endurance
- Helps shorten the length of an illness
- Contributes to my overall well-being
- Helps me stay as healthy as possible

## What they're using...

### Top general treatments<sup>1</sup>

% consumers

Exercise	46
Vitamins	42
Food	37
Supplements	32
Herbals	20

### Medication and supplement use

% of consumers

Only Other	40
VMS Only	34
Rx/OTC only	15
Both VMS and Rx	12

### Top VMS groups<sup>1</sup>

Avg 4.0 groups % consumers

Multivitamins	73
Single Letter Vitamins	54
Mineral Supplements	44
Heart Supplements	38
Immune Support	36

### Top VMS Products<sup>1</sup>

Avg 5.8 products % consumers use 2-4+ times/week

Multivitamin (General)	27
Vitamin C	24
Multivitamin (Men)	19
Vitamin C based supplement	18
Vitamin B complex	12
Vitamin E	12

### Top Functional product groups<sup>1</sup>

Avg 1.1 groups % consumers

Protein Bars	39
Fortified Beverages	38
Nutritional & Sports Products	35

### Top Functional Products<sup>1</sup>

Avg 1.6 products % consumers use 2-4+ times/week

Fortified Water	25
Fortified Tea	17
Energy drinks	17

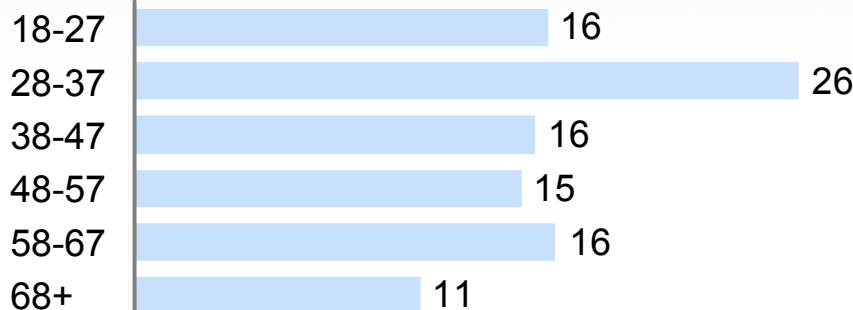
<sup>1</sup> Top by index and %

## PROACTIVE PREVENTION

# Proactive Prevention people spend the most on the category and visit vitamin stores more frequently

No skew  
Index >120  
Index <80

### Age, % of respondents

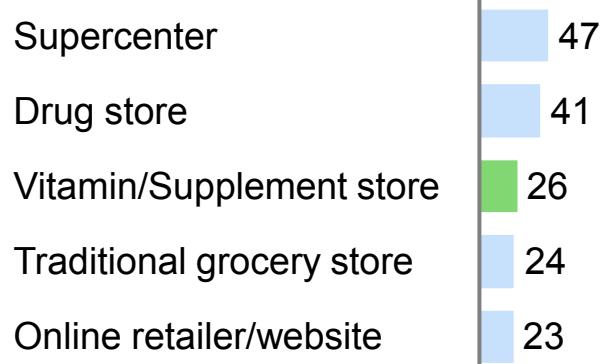


### Gender, % of respondents



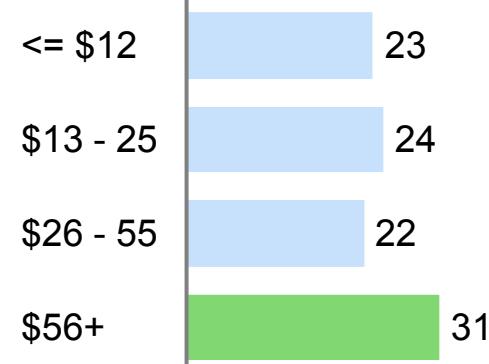
### Where they shop

% of respondents



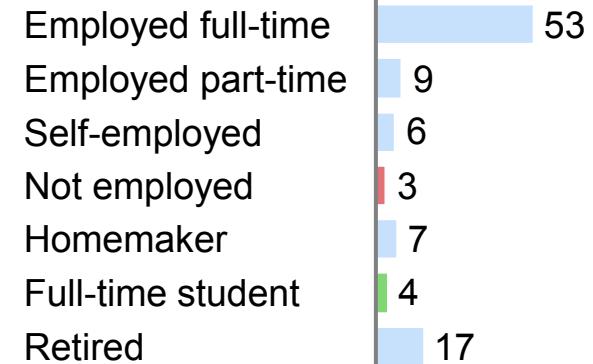
### VMS Spend/month,

% of respondents



### Employment

% of respondents



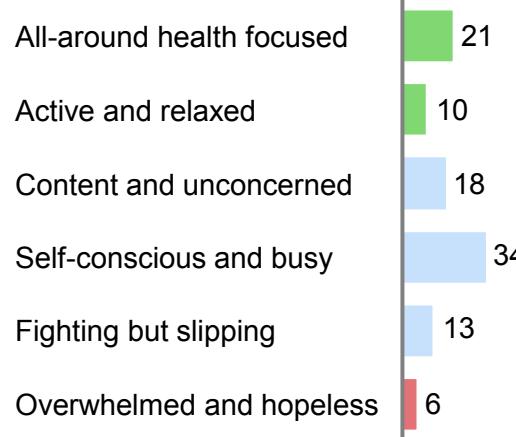
## PROACTIVE PREVENTION

# Proactive Prevention group is quite healthy in spite of their hectic, stressful lives

No skew  
 Index >120  
 Index <80

### Attitudinal Segments

% of respondents

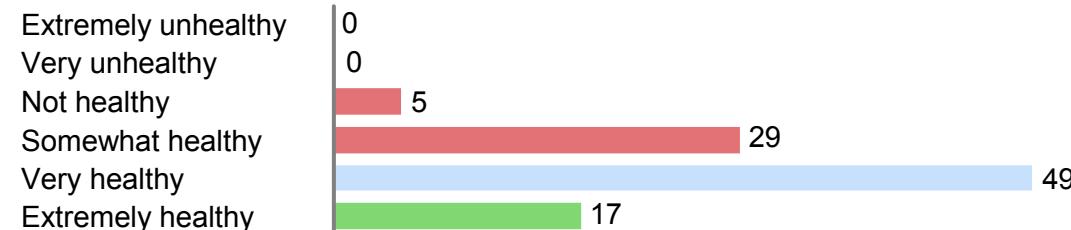


### Top Statements<sup>1</sup>

- My stress has a negative impact on my daily life
- My life is too hectic/stressful
- I feel depressed about my health
- I am confused with all of the different vitamin supplements
- Life is so complicated. I need simple solutions for my nutrition

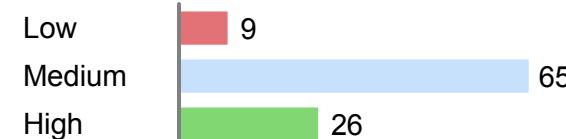
### How they see their general wellness

% of respondents



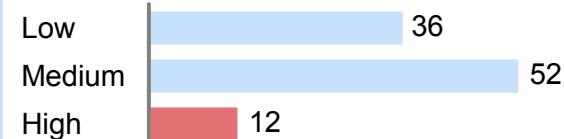
### Quality of sleep

% of respondents



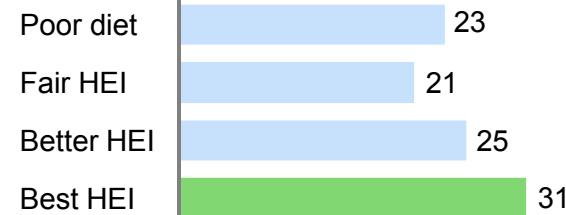
### Level of stress

% of respondents



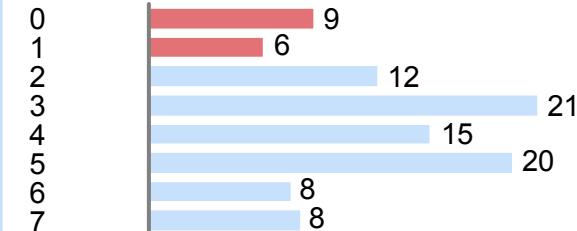
### Quality of diet

% of respondents



### Frequency of exercise/week

% of respondents

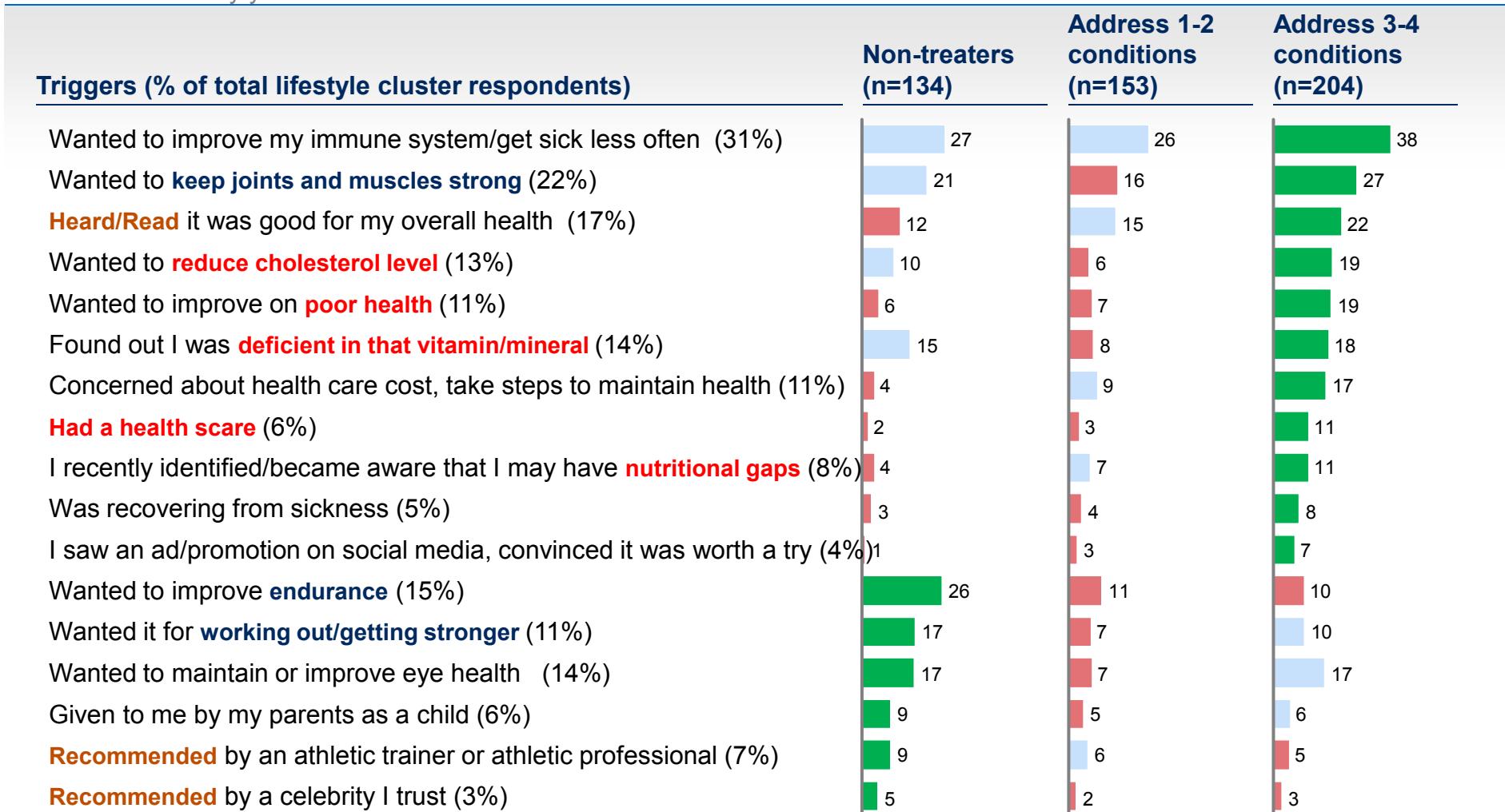


<sup>1</sup> Top by index and %

## Treaters are motivated by improving immunity and strength; non-treaters are motivated by the desire to gain strength and eye health

### Triggers for starting to use VMS

Q16. Thinking back to when you first started taking vitamins, minerals, herbals, or supplements, which of the following, if any, were reasons why you started?



## FEW CONDITIONS, NO MAJOR CONCERNS

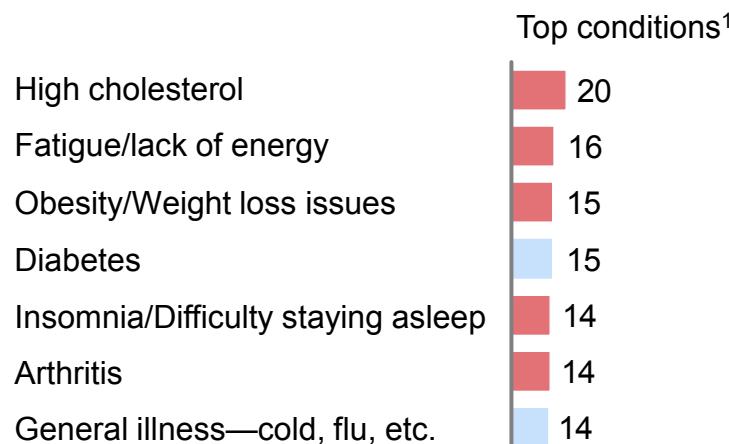
### Few conditions, no major concerns group has very few conditions and very few concerns for the future

No skew  
Index >120  
Index <80

**Few conditions, no concerns have conditions associated with obesity and age, and they are concerned about the more serious results of those conditions**

#### On average, they have 3 current conditions...

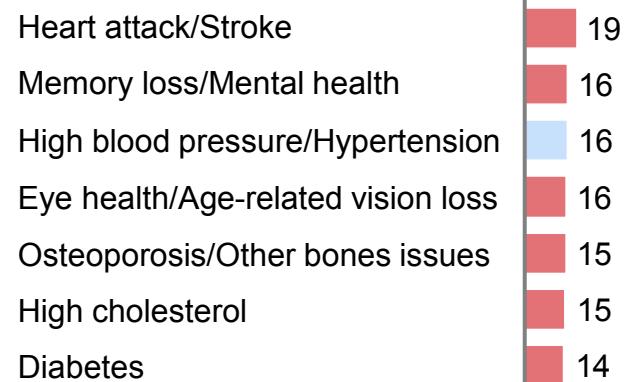
% consumers



#### On average, they want to prevent 3 conditions...

% consumers

Top conditions they want to prevent<sup>1</sup>



#### ...and they treat 1 of them

# of current conditions



#### ...and they address 1 of them

# of conditions wish to prevent



<sup>1</sup> Top conditions by %

## FEW CONDITIONS, NO MAJOR CONCERNS

# Few conditions, no major concerns group uses vitamins and other methods to control their issues

No skew  
Index >120  
Index <80

## What they look for...

### Need States

% occasions

Ongoing condition management	8
Skeletal strengthening	12
Doctor recommended	9
Sickness recovery and prevention	14
Ensuring complete nutrition	10
Protecting against aging	12
Targeting the best of me	24
Energizing body and mind	11

### Benefits<sup>1</sup>

- Replenishes me
- Helps me stay healthy while losing weight
- Improves my skin/hair/nails
- Helps me gain muscle strength
- Makes me feel happy

## What they're using...

### Top general treatments<sup>1</sup>

% consumers

Exercise	41
Vitamins	37
Food	33
Prescription medication	31
Beverages	19

### Medication and supplement use

% of consumers

Only Other	39
VMS Only	29
Rx/OTC only	19
Both VMS and Rx	13

### Top VMS groups<sup>1</sup>

Avg 3.7 groups

% consumers

Multivitamins	65
Single Letter Vitamins	50
Mineral Supplements	42
Digestive Supplements	36
Heart Supplements	30

### Top VMS Products<sup>1</sup>

Avg 5.0 products

% consumers use  
2-4+ times/week

Vegetable supplements	14
Multivitamin specific for eye health	10
Multivitamin (Child)	9
Vitamin A (cod liver oil)	6
Vitamin B3 (niacin)	6

### Top Functional product groups<sup>1</sup>

Avg 0.9 groups

% consumers

Protein Bars	35
Fortified Beverages	32
Nutritional & Sports Products	31

### Top Functional Products<sup>1</sup>

Avg 1.4 products

% consumers use  
2-4+ times/week

Protein Bars	28
Fortified Water	21
Juice	18

<sup>1</sup> Top by index and %

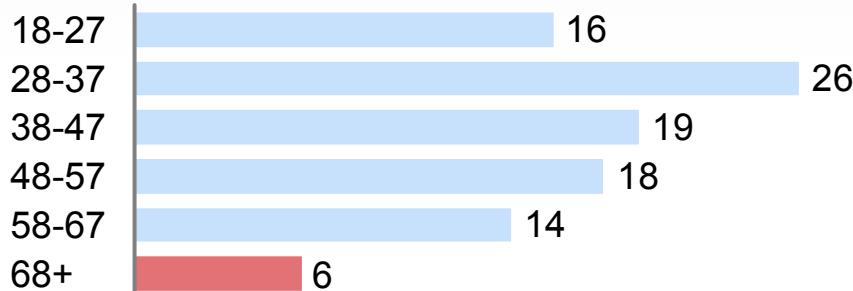
FEW CONDITIONS, NO MAJOR CONCERNS

## Few conditions, no major concerns fall in a wide range of ages and tend to spend somewhat less on VMS

No skew  
Index >120  
Index <80

### Age

% of respondents



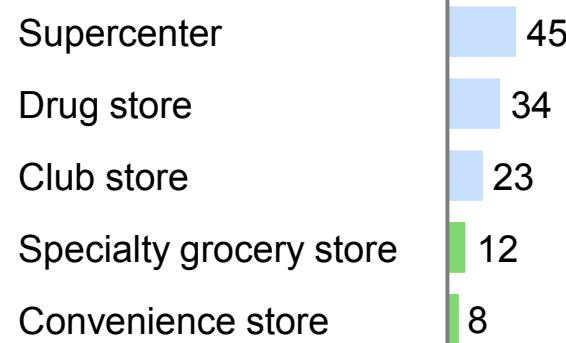
### Gender

% of respondents



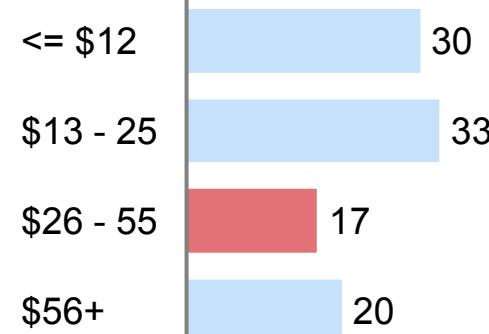
### Where they shop

% of respondents



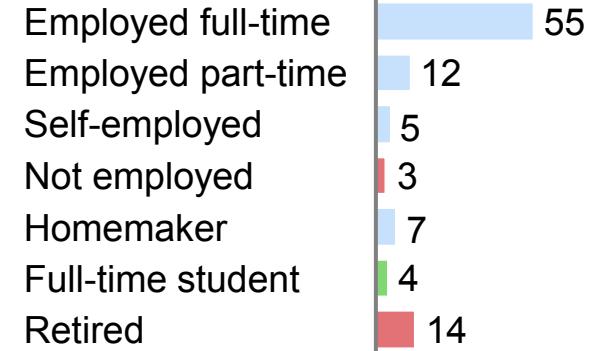
### VMS Spend/month,

% of respondents



### Employment

% of respondents



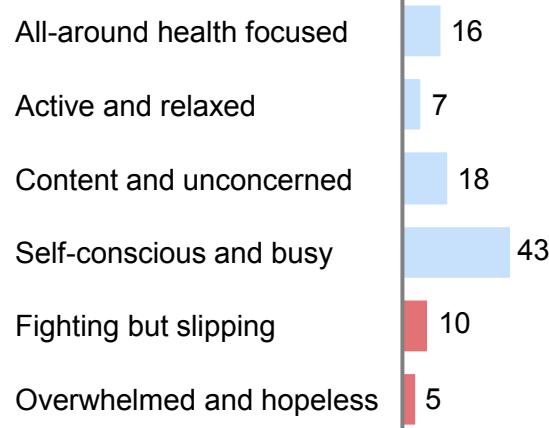
## FEW CONDITIONS, NO MAJOR CONCERNS

# Few conditions, no major concerns consider themselves to be healthy; they exercise frequently and get good sleep

No skew  
Index >120  
Index <80

### Attitudinal Segments

% of respondents

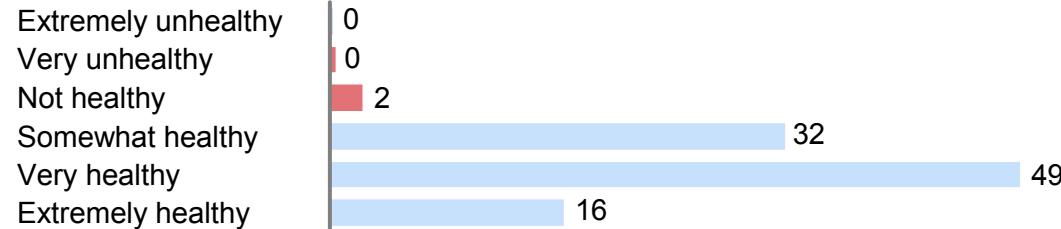


### Top Statements<sup>1</sup>

- Friends and family often come to me for advice
- I am among the first of my friends to embrace new trends
- I consider myself to be living a healthy lifestyle
- Exercise is an essential part of my day
- It is important that others see me as younger than my age

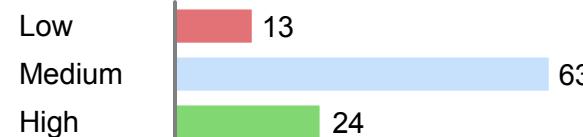
### How they see their general wellness

% of respondents



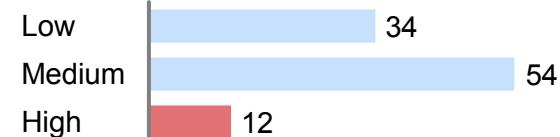
### Quality of sleep

% of respondents



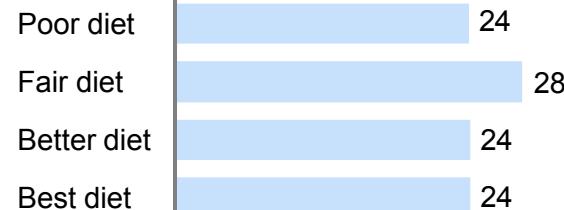
### Level of stress

% of respondents



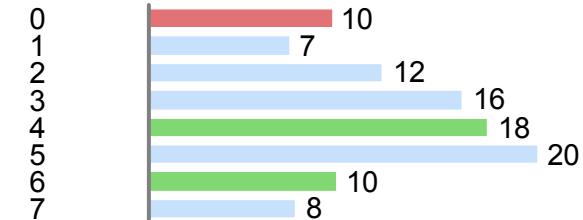
### Quality of diet

% of respondents



### Frequency of exercise/week

% of respondents

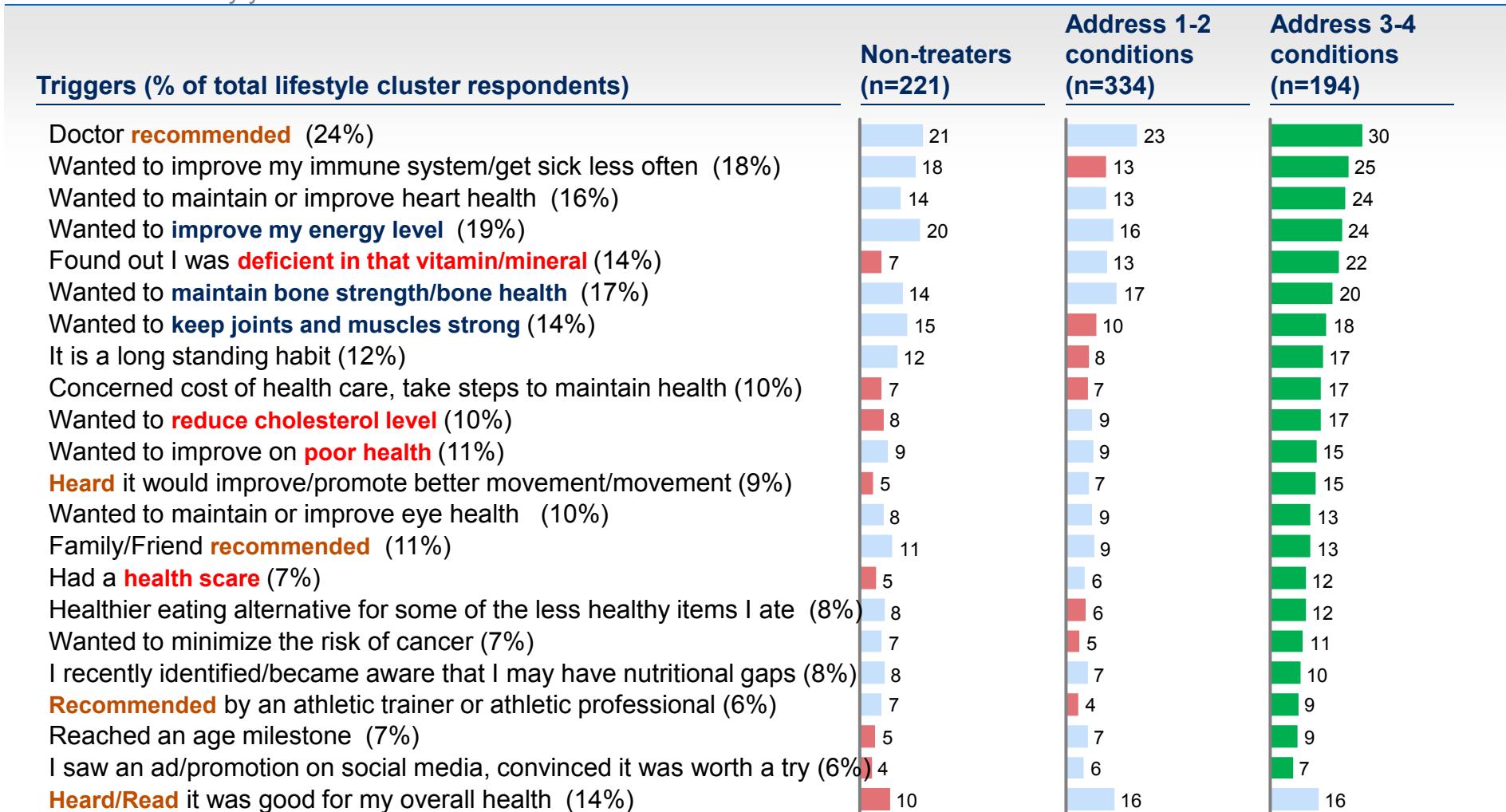


<sup>1</sup> Top by index and %

## Treaters are motivated by their doctors and a desire to improve immunity

### Triggers for starting to use VMS

Q16. Thinking back to when you first started taking vitamins, minerals, herbals, or supplements, which of the following, if any, were reasons why you started?



NO CONDITIONS, NOT WORRIED

## The No Conditions group is primarily concerned with getting sufficient nutrition and targeting ways to be better

No skew
Index >120
Index <80

### What they look for...

#### Need States

% occasions

Ongoing condition management	11
Skeletal strengthening	8
Doctor recommended	6
Sickness recovery and prevention	14
Ensuring complete nutrition	15
Protecting against aging	9
Targeting the best of me	27
Energizing body and mind	8

#### Benefits<sup>1</sup>

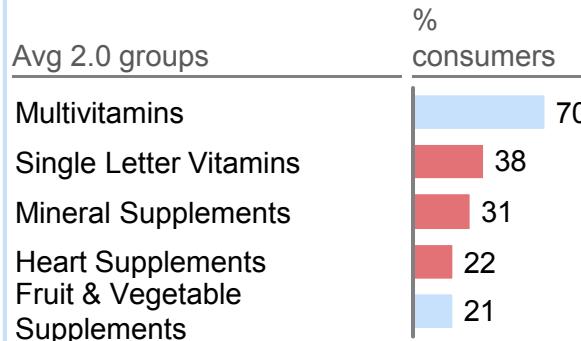
- It's an easy way to get nutrition
- Makes me feel healthy
- Gives me an energy boost
- Helps me feel productive
- Helps my health improve after sickness
- Helps me gain muscle strength

*This group has no current conditions or conditions they are looking to prevent.*

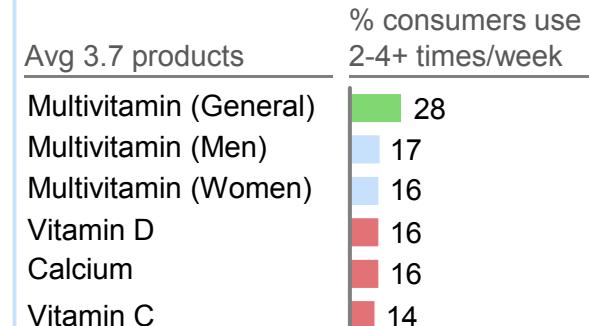
*However, they still use VMS products for general purposes*

### What they're using...

#### Top VMS groups<sup>1</sup>



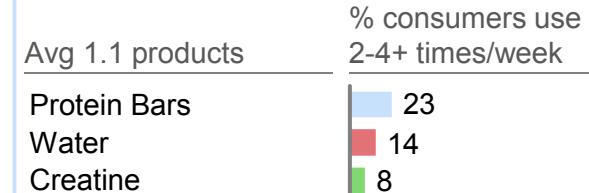
#### Top VMS Products<sup>1</sup>



#### Top Functional product groups<sup>1</sup>



#### Top Functional Products<sup>1</sup>



<sup>1</sup> Top by index and %

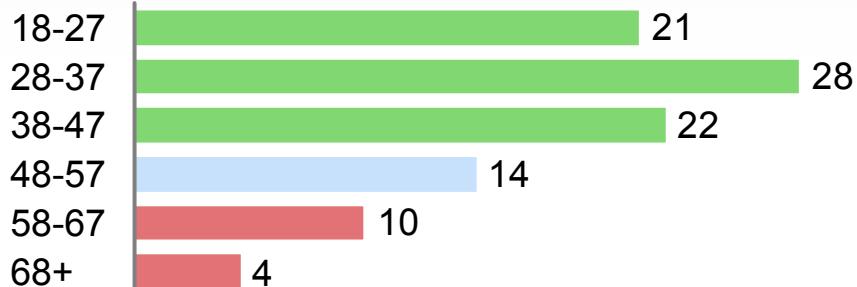
NO CONDITIONS, NOT WORRIED

## No conditions people tend to be younger, and they spend the least on VMS

No skew  
Index >120  
Index <80

### Age

% of respondents



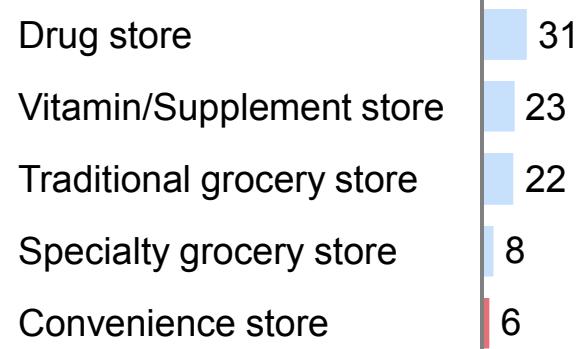
### Gender

% of respondents



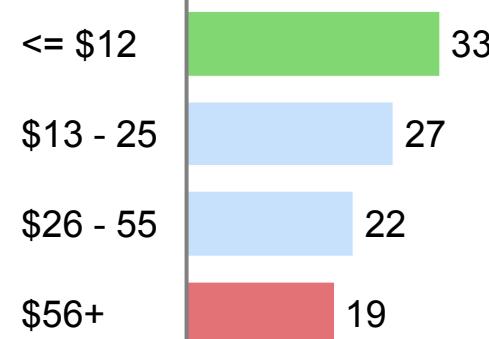
### Where they shop

% of respondents



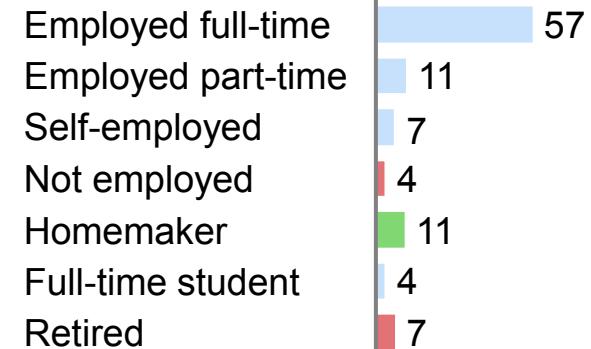
### VMS Spend/month,

% of respondents



### Employment

% of respondents



NO CONDITIONS, NOT WORRIED

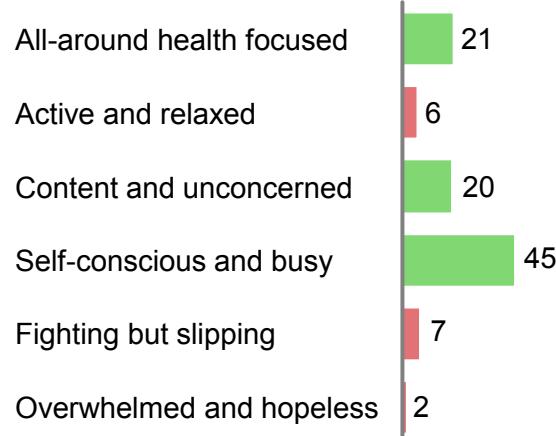
## No conditions people are low-stress; they are social people who aren't immediately concerned with health



No skew  
Index >120  
Index <80

### Attitudinal Segments

% of respondents

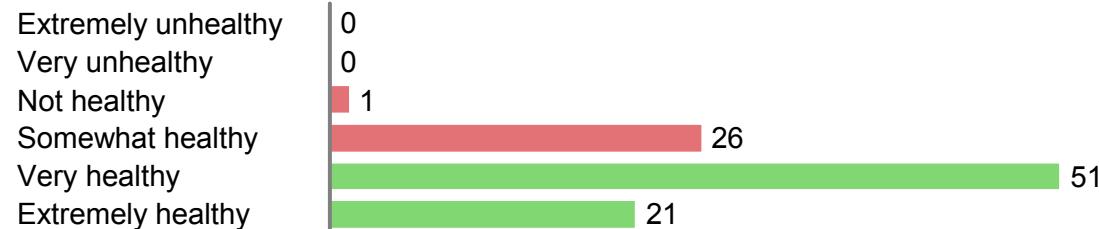


### Top Statements<sup>1</sup>

- I am happy with my current life stage
- I prefer to shop at natural food retailers
- Friends and family often come to me for advice
- I am among the first of my friends to embrace new trends
- Social media impacts how often I exercise

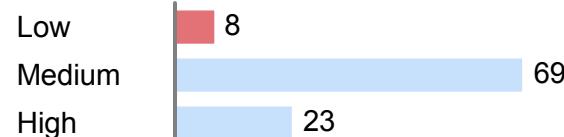
### How they see their general wellness

% of respondents



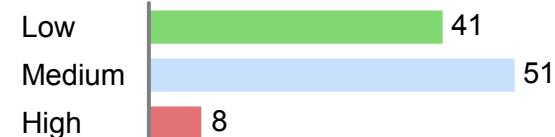
### Quality of sleep

% of respondents



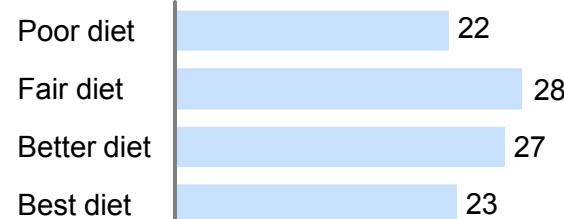
### Level of stress

% of respondents



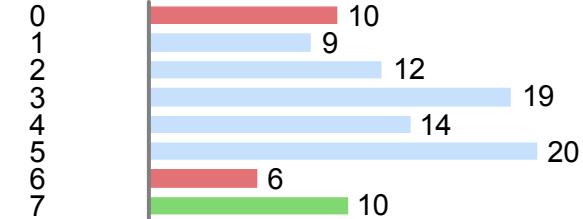
### Quality of diet

% of respondents



### Frequency of exercise/week

% of respondents



<sup>1</sup> Top by index and %