



# Future of Nutritional Supplements GUIDEBOOK



DISCLAIMER: This is a blinded example using fictional data. Its purpose is to illustrate capabilities. All data and content has been changed to protect client confidentiality.

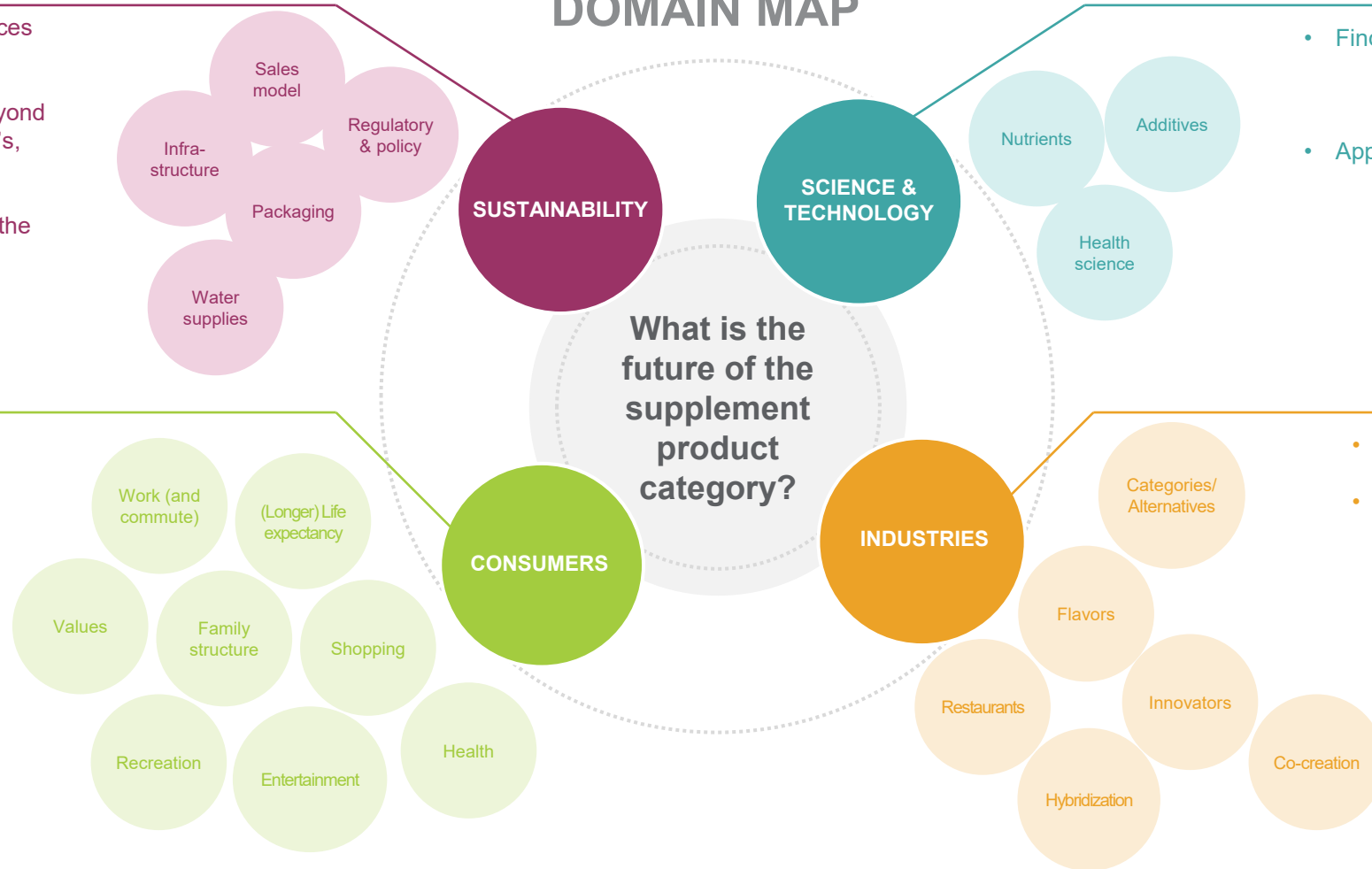
# Exploring the future requires us to think beyond what is happening in our category silo



- Where are nutritional sources coming from?
- How do they reach us?
- What alternatives exist beyond the current model (vitamin's, powder, drinks through retail/physician)?
- How will regulation shape the category?



- How and where we live
- How we spend our time
- Goals and aspirations
- Attitudes (especially re: consumption)
- How we buy and spend

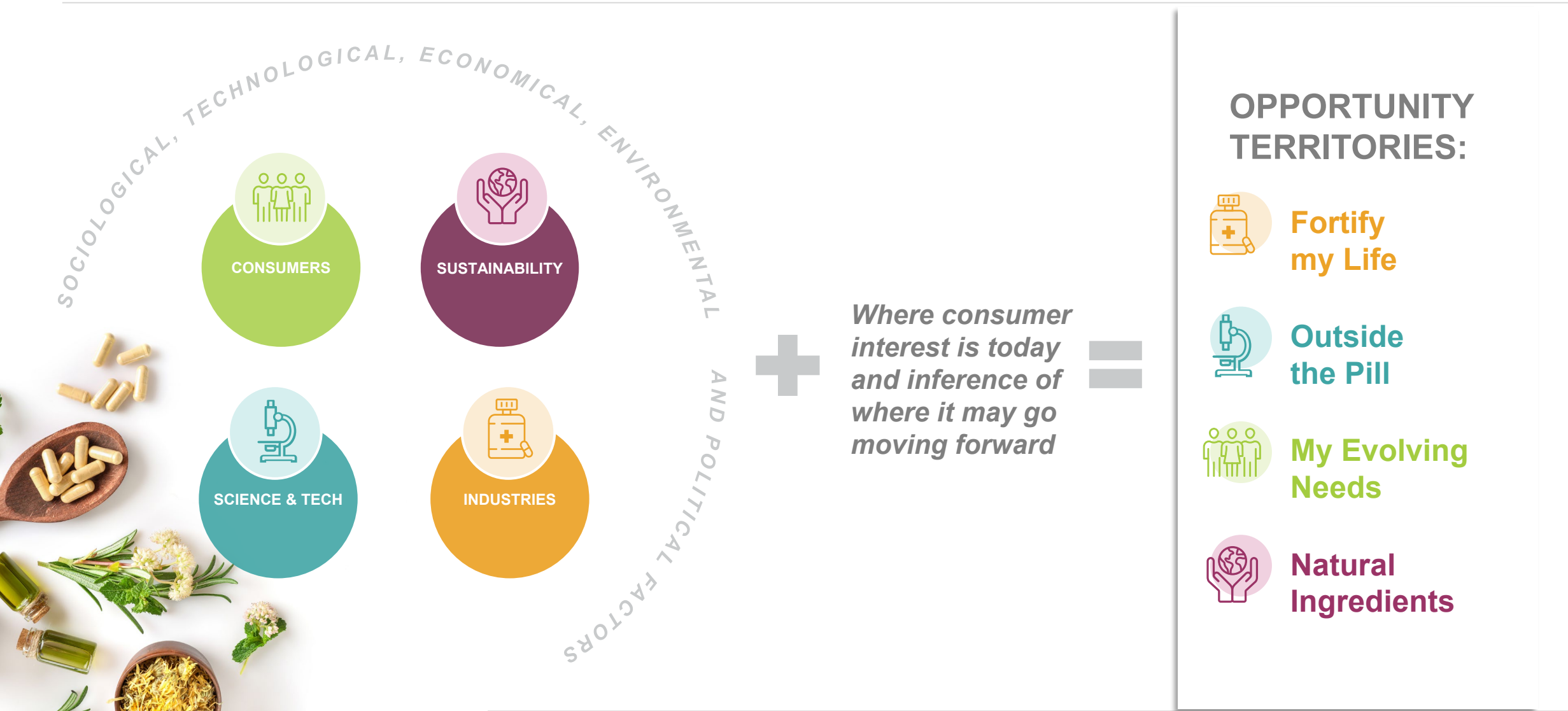


- Findings/discoveries/recommendations
  - Nutrients
  - Additives
  - Functional benefits
- Approaches/ingredients/methods
  - Nutrient sources
  - Technologies (e.g., tablets)



- What's happening in the domain of flavors and usage?
- Consider adjacent categories

# Based on trends and consumer interest, there are four key opportunity territories for the future



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## OPPORTUNITY TERRITORIES: Fortify my Life

*Focus on holistic-wellness benefits that health supplements can provide*

### ALIGNMENT WITH DOMAIN AREAS:

- Consumer Trends
- Science & Technology

### ALIGNMENT WITH GLOBAL MEGATRENDS:

- Naturality
- Personalization

## What could be driving this

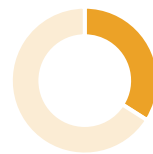
### CONSUMER TRENDS

**Health and wellness/self-care isn't something consumers "do" – it's built into their routines, habits, and choices/decisions they make throughout the day**

Existing focus on [holistic health and wellness](#)/self-care was accelerated by COVID

- This is not age-specific, although different generations have varying motivations and needs; for example, aging consumers are motivated by longevity and maintaining active lifestyles; younger generations report [higher levels of stress](#)
- [Mental health and sleep](#) are validated as elements of whole health
- Nutritional education and awareness is increasingly sophisticated and mainstream

## Consumer behaviors and attitudes today...



**34%** would describe themselves as taking supplements daily



**60%** are influenced by multi-functional benefits when selecting supplements



**51%** would be influenced to take additional nutritional supplements by functional benefits that better align with lifestyle/goals

### IDEAL SUPPLEMENT...

#### Top functional attributes

- Age and lifestyle specific (39%)
- Immunity support (25%)
- Improved Sleep (22%)

#### Lowest functional attributes

- Energy (18%)
- Skin (11%)



## OPPORTUNITY TERRITORIES:

# Fortify my Life

### What could disrupt this further...

#### SCIENCE & TECH TRENDS

There's an emerging tension: as whenever technology and nutrition collide, expect a period of uncertainty and polarization regarding what 'natural' and 'clean' means to consumers in the context of supplements

- Technology such as [CRISPR](#) (gene editing) opens the door to new, 'natural' nutritional enhancements, flavors, and sweeteners
- Ambiguity in [U.S. labeling and oversight standards](#) could lead to uncertainty about potential uses and consumer confidence

#### FROM OUR RESEARCH:

53% of those 18-49 are extremely/very open to supplements that have gene-edited ingredients, vs. only 33% of 50-65 year-olds

- [Health tracking apps and tech](#) are central to holistic wellness routines, are increasingly integrated, and are poised to grow more important as artificial intelligence continues to evolve in efficacy and applications

### Areas to consider...



#### NOW

Consider enhanced/functional brand equities and align messaging or reposition against emerging long-term trends of mental health, sleep/wake routines, and immunity



#### NEXT

Explore strategies for consumer education and labeling to build confidence and trust in offerings and the overall brand



#### LATER

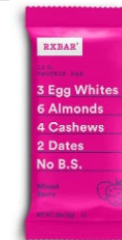
Developing products and holistic solutions (e.g., partnering with apps and self-care brands) to make consumers' wellness routines easier

### Sparks



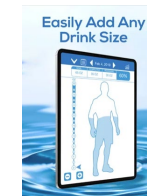
#### Driftwell

Designed with relaxation in mind, Pepsi's Driftwell offers one flavor, one small size, magnesium and L-theanine and no sugar, calories or carbonation



#### RX Bar

The simple list of core ingredients is a critical and differentiating part of this paleo diet-focused brand's positioning



#### Daily Water Tracker Reminder

It's too late if you feel thirsty...this free app gives reminders to drink more water and keep track of what you've finished to combat chronic dehydration