



BRANDS IN ***MOTION***

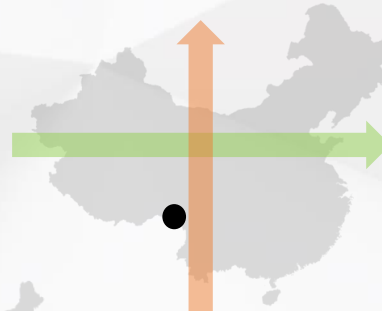
HEALTH & WELLNESS CATEGORY

HEALTH & WELLNESS PRODUCTS **CATEGORY**

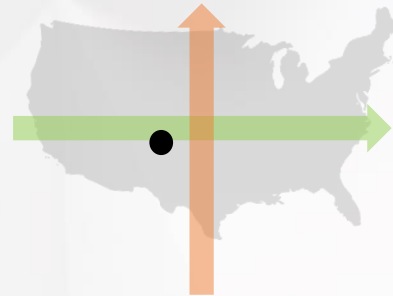
United Kingdom



China



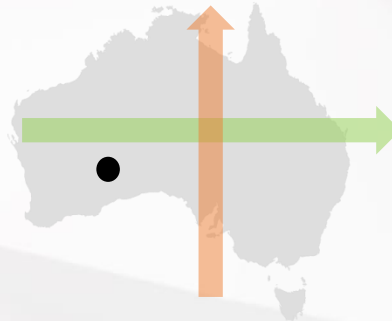
United States



Germany



Australia



HEALTH & WELLNESS PRODUCTS:

Category defined as: Products and services that protect, enhance, help to regain or maintain health and wellness. This includes prescription drugs and over-the-counter treatments, vitamins, supplements, health, nutrition and fitness services and devices

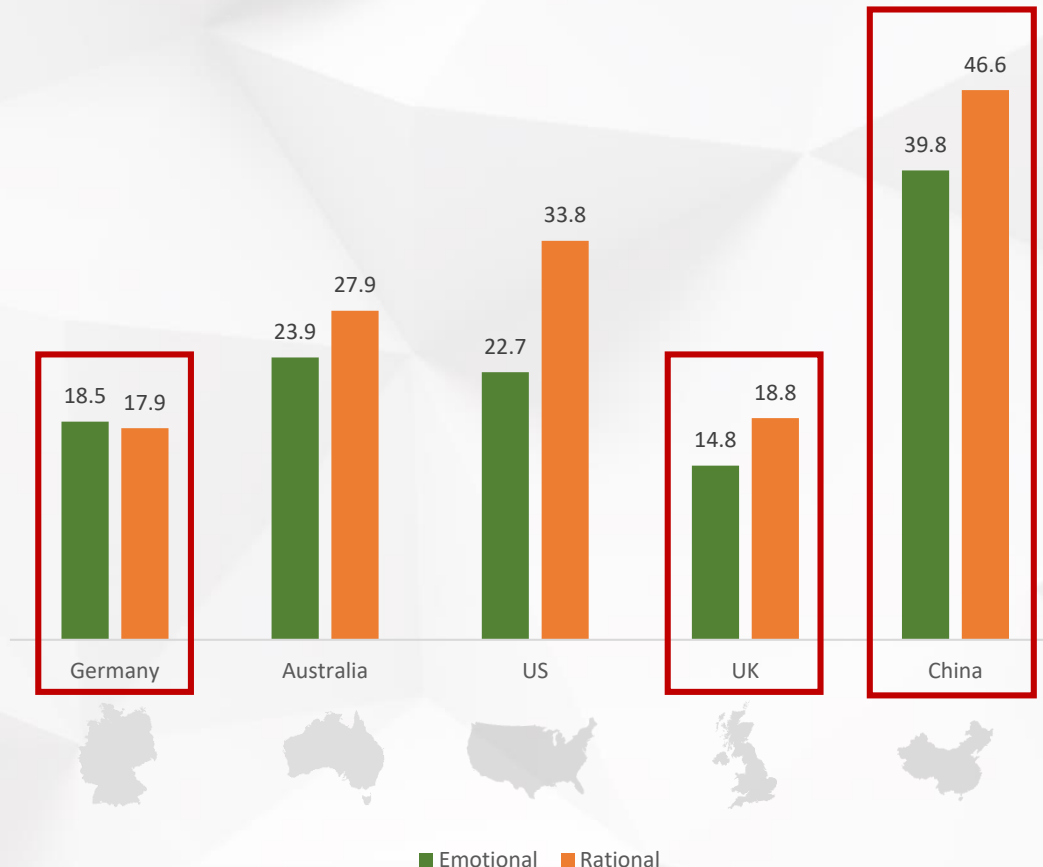
The category was surveyed in 5 of the 6 markets and in each market the category is seen as a survivor based on the average emotional and rational responses of those surveyed.

A total of 5,028 people answered questions specific to the category across the five markets surveyed.

(US:1107, UK:906, China:1065, Germany:724, & Australia:1226)



GLOBAL VIEW: **HEALTH & WELLNESS PRODUCTS**



OBSERVATIONS

- Respondents in China had the highest average emotional and rational response rate for the category.
- Respondents in the UK had the lowest average emotional and rational response rate for the category vs. the other markets surveyed.
- Respondents in Germany had a higher average emotional response rate than rational. This was the only market for which this occurred.

Data represents an average respondent score on a scale of -100 to 100 across the ten category drivers. (6 Emotional and 4 Rational)

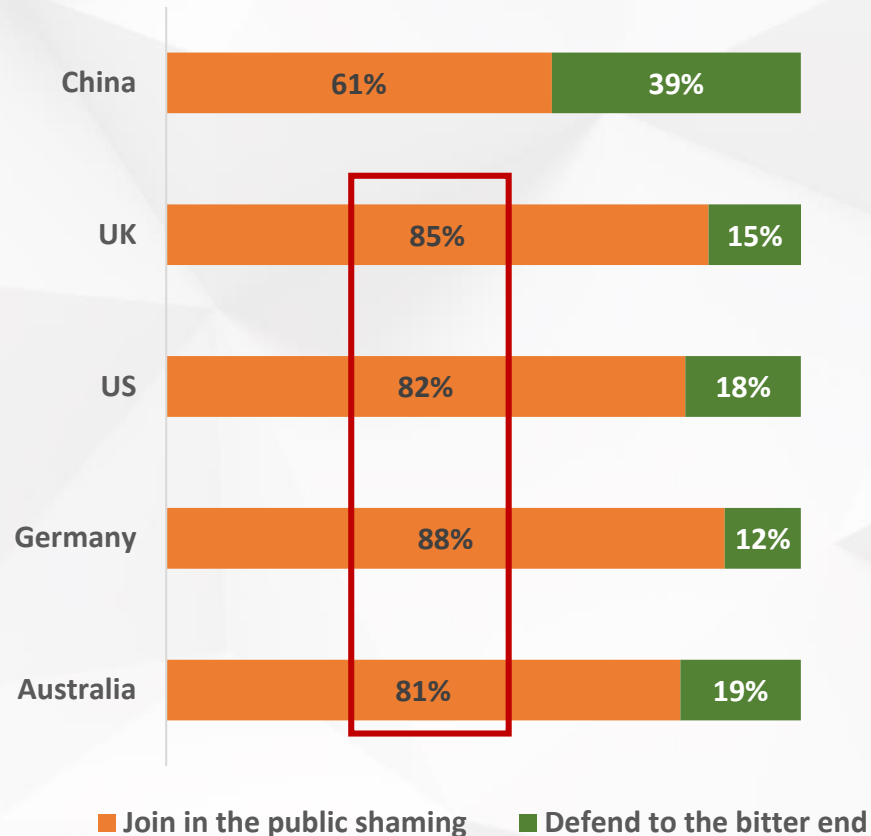




BRANDS IN ***MOTION***

Emotional Drivers

GLOBAL VIEW: **EMOTIONAL DRIVER**



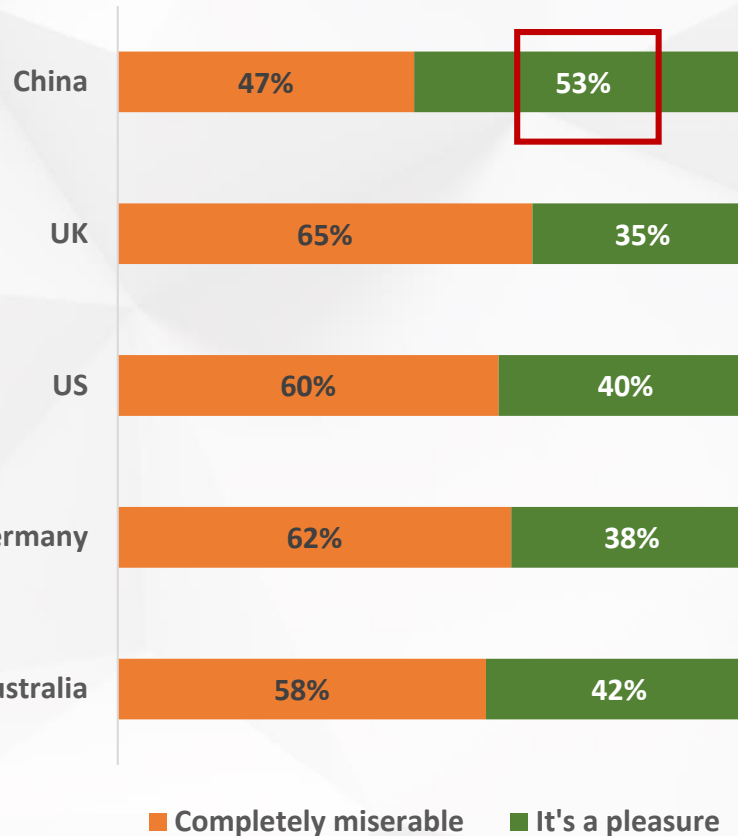
DEFEND OR SHAME

Suppose a Health & Wellness company was publicly under attack for a product or service issue, would you?

- In all markets but China, more than 80% of respondents said they would "Join in the public shaming"



GLOBAL VIEW: **EMOTIONAL DRIVER**



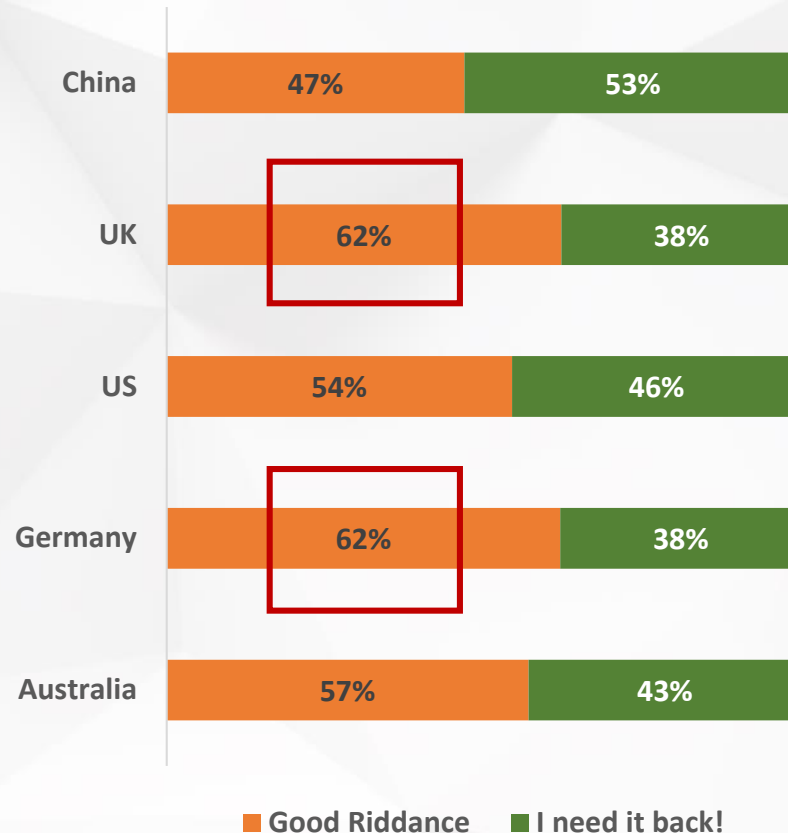
EXPERIENCE

When interacting with Health & Wellness companies, generally how is the experience?

- At 53%, China was the only market to have a larger majority say that the experience is a pleasure
- Nearly 6 out of 10 Respondents in UK, US, Germany and Australia believe the experience with H&W Companies is "Completely miserable".



GLOBAL VIEW: **EMOTIONAL DRIVER**



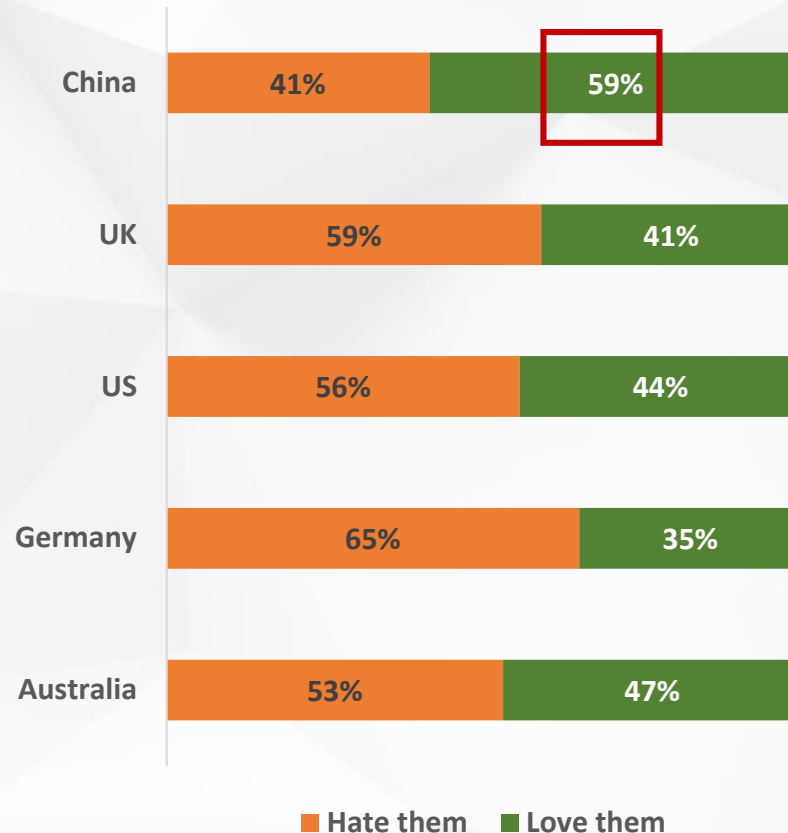
DISAPPEARED

If the Health & Wellness products were to one day just disappear, how would you feel?

- European markets of Germany and UK showed the least reliance on the category with over 6 out of 10 respondents indicating “Good Riddance” if the category was to just one day disappear.



GLOBAL VIEW: **EMOTIONAL DRIVER**



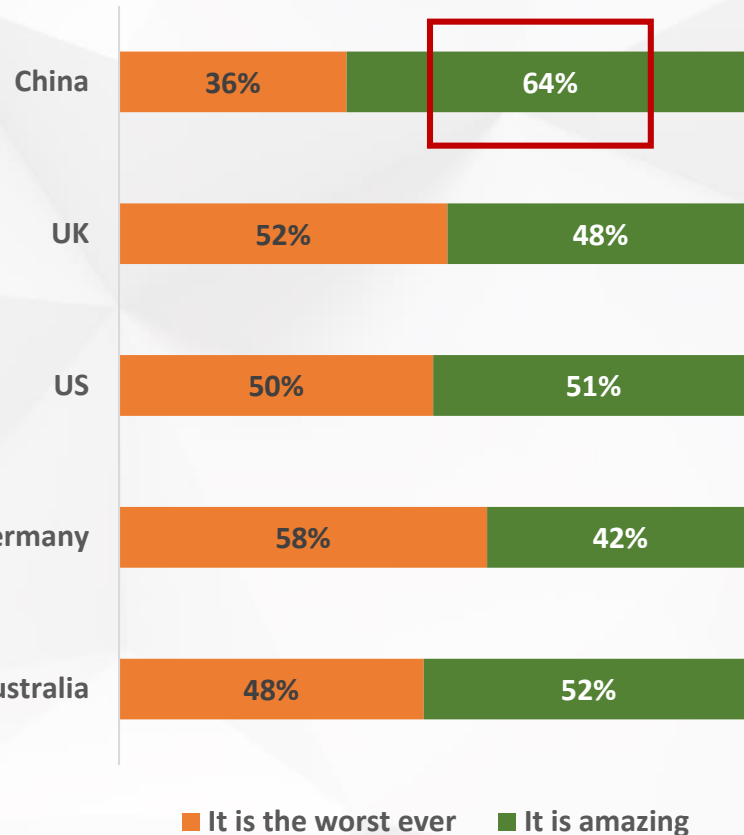
LOVE/HATE

When thinking about Health & Wellness product companies do you generally...?

- Respondents in China showed the most love for Health and wellness products with nearly 60% of them saying “Love them” when asked how they generally feel about companies in this category.



GLOBAL VIEW: **EMOTIONAL DRIVER**



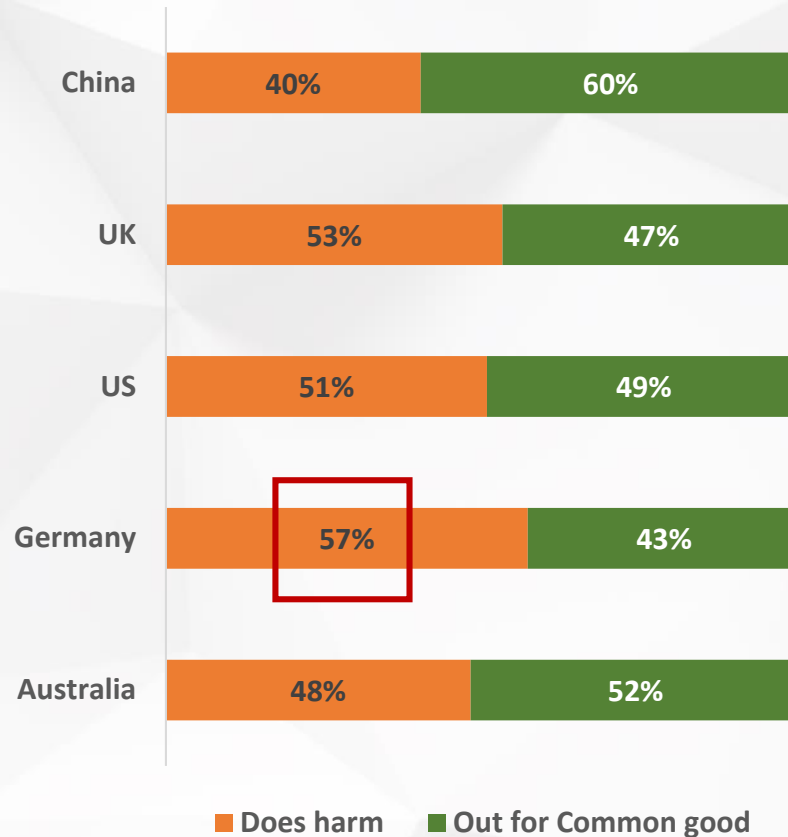
OVERALL IMPRESSION

What is your overall impression of Health & Wellness product companies?

- Respondents in China had the highest overall impression of Health & Wellness product companies with 64% of them responding with “It is amazing” when asked their overall impression of the category.



GLOBAL VIEW: **EMOTIONAL DRIVER**



SOCIAL IMPACT

When thinking about Health & Wellness product companies, what is their overall impact on society?

- More so than any other market, respondents in Germany felt that companies in this category “Does harm” when asked about their overall impact on society.

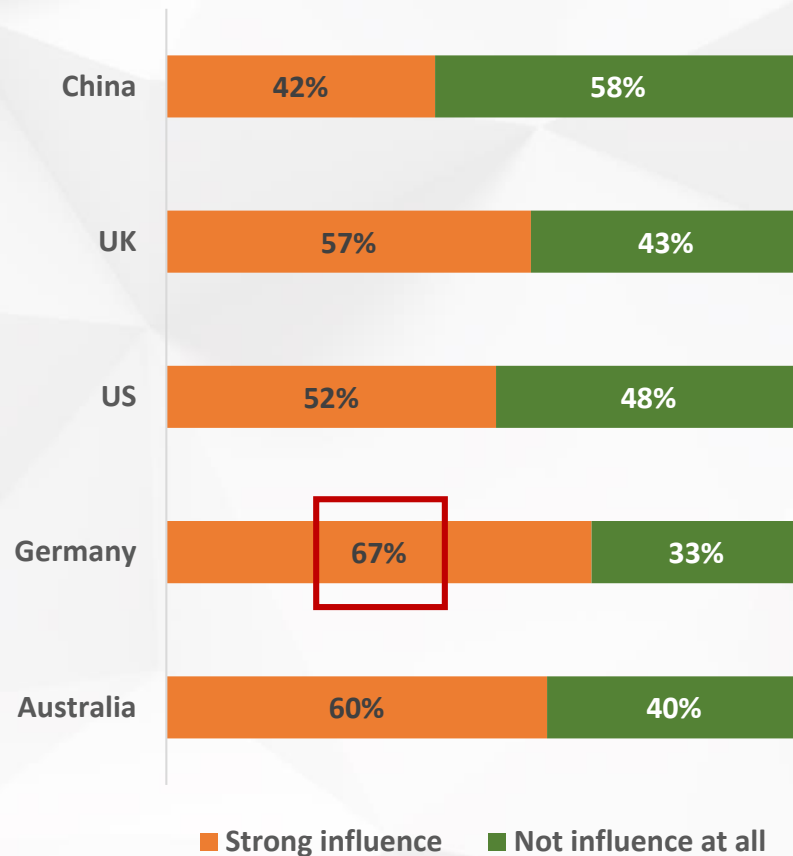




BRANDS IN ***MOTION***

Rational Drivers

GLOBAL VIEW: **RATIONAL DRIVER**



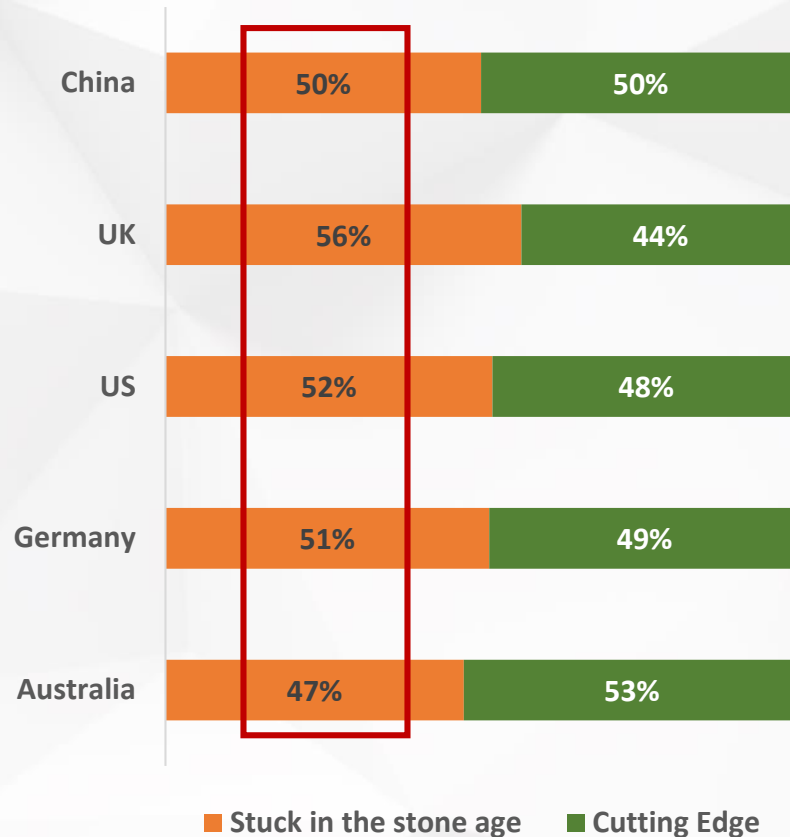
EXECUTIVE BEHAVIOUR

Would the behaviours of the executive leaders of a company in the Health & Wellness industry influence your decision to support the brand or not?

- Nearly 7 out of 10 respondents in Germany believe that the behaviours of executive leaders in this category influence their decision to support a brand.



GLOBAL VIEW: **RATIONAL DRIVER**



INNOVATION

How innovative are Health & Wellness product companies?

- Nearly 50% of respondents in all five markets responded with “Stuck in the stone age” when asked how innovative companies are in the category.



GLOBAL VIEW: **RATIONAL DRIVER**



China



UK



US



Germany



Australia



■ Have no need for them ■ Can't live without them

NECESSARY

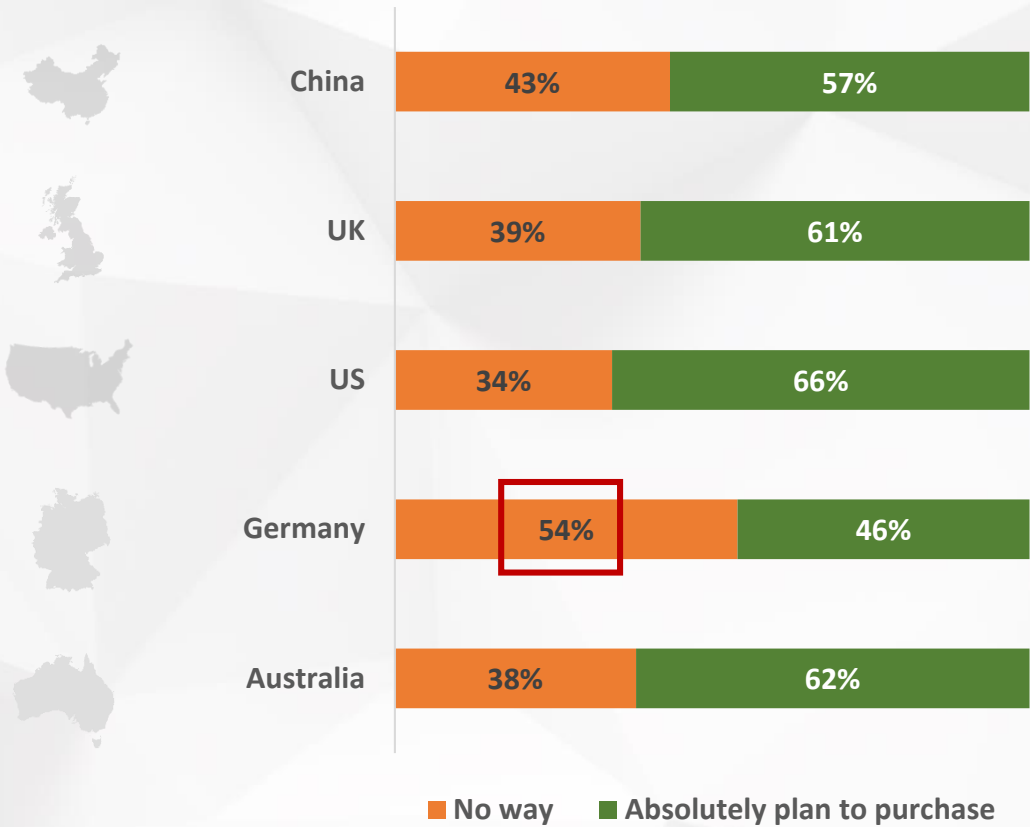
How necessary are Health & Wellness products to your life?

- At 55%, respondents in the US displayed the highest necessity for the category vs. the other four markets surveyed.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.



GLOBAL VIEW: **RATIONAL DRIVER**



INTENT TO PURCHASE

How likely are you to purchase products or services from Health & Wellness product companies in the next year?

- In all markets but Germany the majority of respondents indicated purchase intent.
- Close to 50% of respondents in all markets indicated purchase intent.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.

