THE FOOD AS MEDICINE OPPORTUNITY IN FOOD RETAIL
Introduction

Steve Markenson

Director, Research & Insights
FMI – The Food Industry Association
Antitrust Compliance

- It is FMI’s policy to comply in all respects with the antitrust laws.
- All participants in FMI meetings and events are expected to comply with applicable antitrust and competition laws.
- Avoid discussions of sensitive topics that can create antitrust concerns.
  - Agreements to fix prices, allocate markets, engage in product boycotts and to refuse to deal with third parties are illegal.
  - Discussions of prices (including elements of prices such as allowances and credit terms), quality ratings of suppliers, and discussions that may cause a competitor to cease purchasing from a particular supplier, or selling to a particular customer, should be avoided.
  - No discussion that might be interpreted as a dividing up of territories.
- It is important to avoid even the appearance of unlawful activity.
- Questions or concerns? Please consult with FMI staff.
Speakers / Disclosures:

Allison Yoder, MA, RDN, LD  
Academy of Nutrition and Dietetics Foundation

Krystal Register, MS, RDN, LDN, FAND  
FMI – The Food Industry Association

Charlie Arnot  
Center for Food Integrity
Learning Objectives

1. Describe the scope of Food as Medicine as defined by the Academy of Nutrition and Dietetics.

2. Identify consumer drivers of the Food as Medicine movement.

3. Demonstrate how Food as Medicine programs can be applied in food retail settings.

4. Apply Food as Medicine consumer-centric strategies to key target shoppers.
The Food as Medicine Opportunity in Food Retail 2021 Report

- The scope of Food as Medicine, as defined by the Academy of Nutrition and Dietetics.
- Consumer drivers behind the Food as Medicine movement.
- Programs that can be applied in food retail settings.
- Consumer-centric strategies for key target shoppers.

Support for the project was funded through a grant from Walmart.
Methodology

1. Food Retailer survey
2. Consumer survey
3. Digital ethnography
4. Retail Registered Dietitian interviews
Understanding the Opportunity

Krystal Register, MS, RDN, LDN, FAND

Director, Health and Well-being
FMI – The Food Industry Association
A Changing Health and Well-being Landscape

Consumers Advance Priorities
Behavior Shifts Endure
Positives for Food Retail
Sharp Growth in Retail Programs
Consumers Seek Benefits from Food Groups

Consumers report including food groups from the Dietary Guidelines for Americans to gain specific health benefits:

Beans, peas or lentils
- Never Heard Of: 5%
- Aware of but do not follow: 22%
- Follow Somewhat: 43%
- Follow Closely: 29%

Seafood
- Never Heard Of: 5%
- Aware of but do not follow: 27%
- Follow Somewhat: 43%
- Follow Closely: 24%

Healthy oils
- Never Heard Of: 5%
- Aware of but do not follow: 22%
- Follow Somewhat: 45%
- Follow Closely: 28%
The Time is Right for Food as Medicine

FOOD STORES EYED AS TRUSTED ALLIES

<table>
<thead>
<tr>
<th>Working against me</th>
<th>On my side</th>
</tr>
</thead>
<tbody>
<tr>
<td>8%</td>
<td>67%</td>
</tr>
<tr>
<td>10%</td>
<td>65%</td>
</tr>
<tr>
<td>9%</td>
<td>58%</td>
</tr>
<tr>
<td>9%</td>
<td>51%</td>
</tr>
<tr>
<td>9%</td>
<td>48%</td>
</tr>
<tr>
<td>10%</td>
<td>47%</td>
</tr>
<tr>
<td>10%</td>
<td>45%</td>
</tr>
</tbody>
</table>

When it comes to helping me stay healthy, these people and institutions are...

Source: FMI U.S. Grocery Shopper Trends 2021
Consumer Perspectives on Food as Medicine

“When you hear the term Food as Medicine, what do you think of?”
## Consumer Familiarity on Food as Medicine

### Source of Familiarity with Term Food as Medicine

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registered dietitian or nutritionist</td>
<td>34%</td>
</tr>
<tr>
<td>Grocery store or supermarket</td>
<td>32%</td>
</tr>
<tr>
<td>Web site or social media</td>
<td>30%</td>
</tr>
<tr>
<td>Doctor’s office</td>
<td>27%</td>
</tr>
<tr>
<td>Drug store/pharmacy</td>
<td>19%</td>
</tr>
<tr>
<td>Hospital</td>
<td>17%</td>
</tr>
<tr>
<td>Food pantry</td>
<td>16%</td>
</tr>
<tr>
<td>Pharmacists</td>
<td>15%</td>
</tr>
<tr>
<td>Trainer/Health club</td>
<td>5%</td>
</tr>
</tbody>
</table>
Food Retailers Relay Positive Feedback

“When you hear the term Food as Medicine, what do you think of?”

**Health**  **Better-for-You**  **Preventative**

“Food as Medicine refers to using food as a way to improve overall health, well-being and quality of life. This could be everything from eating more high-fiber foods to help better control blood sugar levels to preparing more meals at home as a family to promote a stronger family relationship.”
Clarifying the Concept

Allison Yoder, MA, RDN, LD

Nutrition in Food Retail Program Development Fellow

Academy of Nutrition and Dietetics Foundation
Food as Medicine

**Definition**

Food as Medicine is a reaffirmation that food and nutrition play a role in sustaining health, preventing disease, and as a therapy for those with conditions or in situations responsive to changes in their diet.

- **Food as preventative medicine to encourage health and well-being**
- **Food as medicine to improve nutrition security**
- **Food as medicine in disease management and treatment**
- **Food as medicine to promote food safety**
FMI Policy of Food as Medicine

FMI believes this conceptual definition, grounded in science, will help guide food retailers and their industry partners to deliver programs to connect food to health for consumers in practical and applicable ways.

FMI – The Food Industry Association
Policy Statement on Food as Medicine
Consumers Find Food as Medicine Appealing

Associations with the term after hearing the description:

38% very appealing
45% somewhat appealing
80% relayed positive feedback

Why the concept is appealing to those who consider it appealing:
Retailer Programming Supports the Concept

Retailers are prioritizing programs for both customers and employees that align with the definition of Food as Medicine.

<table>
<thead>
<tr>
<th>Category</th>
<th>Customer Programming</th>
<th>Employee Programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encourage Health and Well-being</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Manage and Treat Disease</td>
<td>79%</td>
<td>85%</td>
</tr>
<tr>
<td>Improve Nutrition Security</td>
<td>63%</td>
<td>42%</td>
</tr>
<tr>
<td>Promote Food Safety</td>
<td>67%</td>
<td>54%</td>
</tr>
</tbody>
</table>

The Food as Medicine Opportunity in Food Retail
Retailers Face Competition in Advancing Efforts

Co-location of food pantries and health centers
Farmers Markets
Mobile Markets
Community Support Agriculture Programs

“By capitalizing on Food as Medicine programs, promotions and value-added services, all food retailers, regardless of size, geography and customer base, can increase their value as both a destination and as a partner in their customers’ shopping and well-being journeys.”

-Academy of Nutrition and Dietetics Foundation
Crucial Role of Registered Dietitian Nutritionists

- **Elevate basket size** and sales through direct and indirect customer interactions
- **Collaborate** with internal and external partners to increase food access and **improve nutrition security**
- **Promote food safety** education with both food retail employees and customers
- **Drive brand awareness** through science-based marketing and communication strategies
- **Prevent and/or manage many of the chronic conditions** driving employer health care costs
- Define and curate **cross-category product selection**
- **Expand access** to health services through telenutrition and other digital nutrition solutions
The combination of program models demonstrate improved results, including positive health outcomes and return-on-investment (ROI).

Five Retail Models to Drive Efforts

- Prescription Program
- Incentive Program
- Medically Tailored Nutrition
- Path-to-Purchase Marketing
- Personalized Nutrition Education
Five Retail Program Models to Drive Efforts

Prescription Program

- Produce Prescriptions *
- Food Prescriptions *

* Paired with incentive programs

<table>
<thead>
<tr>
<th>CONSUMER FEEDBACK ON FOOD PRESCRIPTION PROGRAMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>30% said one or more stores they regularly shop offer this</td>
</tr>
</tbody>
</table>
Five Retail Program Models to Drive Efforts

- Coupons / Vouchers
- Price Discounts
- Price Increases
- Rebates
- Taxes

### CONSUMER FEEDBACK ON FOOD INCENTIVE PROGRAMS WITH COUPONS OR VOUCHERS

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>38%</td>
<td>said one or more stores they regularly shop offer this</td>
</tr>
<tr>
<td>62%</td>
<td>of those whose stores offer incentive programs have participated or used it</td>
</tr>
<tr>
<td>72%</td>
<td>of all respondents find food incentive programs somewhat or very appealing</td>
</tr>
</tbody>
</table>
Five Retail Program Models to Drive Efforts

Medically Tailored Nutrition

- Meal Programs *
- Food Programs *

* Paired with Medical Nutrition Therapy (MNT)

<table>
<thead>
<tr>
<th>Consumer Feedback on Medically Tailored Food or Meal Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>29% said one or more stores they regularly shop offer this</td>
</tr>
<tr>
<td>67% of those whose stores offer medically tailored food or meal programs have participated or used it</td>
</tr>
<tr>
<td>62% of all respondents find this type of program somewhat or very appealing</td>
</tr>
</tbody>
</table>

The Food as Medicine Opportunity in Food Retail
Five Retail Program Models to Drive Efforts

- Signage and Displays
- Nutrition Labels
- Food / Cooking Demonstrations
- Media Promotions and Marketing Strategies
- Choice Architecture

### Consumer Feedback on Signage and Displays Focused on Health and Nutrition
(One of the Path-to-Purchase Marketing Strategies)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>43%</td>
<td>said one or more stores they regularly shop offer this</td>
</tr>
<tr>
<td>67%</td>
<td>all respondents find this type of program somewhat or very appealing</td>
</tr>
<tr>
<td>65%</td>
<td>of those whose stores offer path-to-purchase marketing programs have participated or used them</td>
</tr>
</tbody>
</table>
Five Retail Program Models to Drive Efforts

- Group Classes
- Store Tours
- Health Screening
- Employee Wellness
- Nutrition Resources
- MNT
- 1:1 Nutrition Education
- DSME

### CONSUMER FEEDBACK ON HEALTH SCREENINGS
(ONE OF THE PERSONALIZED NUTRITION EDUCATION STRATEGIES)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>37%</td>
<td>Of responding consumers said one or more stores they regularly shop offer health screenings</td>
</tr>
<tr>
<td>64%</td>
<td>Of those whose stores offer it have participated or used it</td>
</tr>
<tr>
<td>62%</td>
<td>Of all respondents find this type of program somewhat or very appealing</td>
</tr>
</tbody>
</table>
Food as Medicine Retail Nutrition Framework

ENCOURAGE HEALTH AND WELL-BEING

Target Shoppers
Families · Aging Healthfully · Employees

Recommended Program Models
Incentive Programs
Personalized Nutrition Education
Path-to-Purchase Marketing

DISEASE MANAGEMENT AND TREATMENT

Target Shoppers
Individuals with Diabetes · Obesity · Heart Disease

Recommended Program Models
Prescription & Incentive Programs
Personalized Nutrition Education
Medically Tailored Nutrition

IMPROVE NUTRITION SECURITY AND PROMOTE FOOD SAFETY

Target Shoppers
SNAP & WIC Beneficiaries
Low-Income Households

Recommended Program Models
Incentive & Prescription Programs
Incentive & Personalized Nutrition Education

Source: Academy Foundation – Food as Medicine Retail Nutrition Landscape
Key Target Shoppers

**Focus Area #1: Encourage Health and Well-being**

*Target Shoppers:*
- Families
- Individuals interested in aging healthfully
- Employees

**Focus Area #2: Disease Management and Treatment**

*Target Shoppers:*
- Individuals with Diabetes
- Individuals with Obesity
- Individuals with Heart Disease

**Focus Area #3: Improve Nutrition Security**

*Target Shoppers:*
- SNAP Beneficiaries
- WIC Beneficiaries
- Low-income households

**Focus Area #4: Promote Food Safety**

*Target Shoppers:*
- Customers
- Employees
- Community Partners
Strategies for Success

Charlie Arnot

Chief Executive Officer
Center for Food Integrity
Digital Ethnography

AI anthropologist that quantifies trends, issues, and the cultural conversation around Food as Medicine, giving us a meaningful understanding of where the trends are headed.

“What are consumers looking for when it comes to:"
- food as preventative medicine,
- food as medicine to help manage disease,
- food as medicine to improve food security, and
- food as medicine to promote food safety?
This culture is driven by people 25-44, middle class, and educated

475,512 Unique Individuals studied.
8,262,457 Topics or meanings studied.
30 hours spent by PhD cultural anthropologist studying the topic.

*Note: the people that drive a culture aren't always the people most affected by it. Although the middle class is driving this culture, changes within it impact the lower and upper class as well.

This topic scores **29%** on the maturity curve.
This culture is currently relevant to **53.5M people**
Major motivations, fears, and attitudes

Why do they care about food as medicine?

These consumers want to enhance their longevity. They are deeply motivated to focus on their own health and overall wellness. As part of this motivation, they've chosen to abandon certain foods, and embrace others.

What values are important to them?

These consumers value healthy living: They support, improvement, maintenance, and enhancement of health for the self, and for others, including caring for physical and personal well-being.
What **values** are important to them?

These consumers believe unaltered products are better for their health. Products that have undergone the least amount of modification from their original state are considered the safest. The closer the product and/or ingredients are to their naturally occurring state, the better the product becomes.

What do they **fear** the most?

These consumers fear never being sufficiently on top of their health. This group fears never having enough time, money, or motivation to do what common sense says they "should" in terms of their health.
Here are the five microcultures relevant to food as medicine

1. **Gut Health**
   Consumers see probiotic rich foods as a way to boost good bacteria that heal their gut.

2. **Nutritional Deficiency**
   Consumers concerned about nutritional deficiency believe whole foods can heal them.

3. **Inflammation, Intolerance & Allergies**
   Consumers want anti-inflammatory foods to safely combat inflammation and symptoms of food intolerances, mild allergies and skin conditions.

4. **Diabetes & Heart Disease**
   Consumers believe the right kinds of fats, fiber, and sweeteners can help them regulate their blood sugar and heart health.

5. **Foodborne Illness**
   Consumers believe we need to take precautions to ensure food safety and security.
Future State: Where the demand spaces net out

Through more than 200 benchmarking experiments, MotivBase has learned that the key time to launch a solution into market is when a demand space falls between 33% - 55% on the maturity curve. That is, it ideally falls in the second half of the Early Majority Stage.
Wrap Up

Measurements and Next Steps
Successful Food as Medicine Applications

Registered Dietitians who operate in food retail settings share ideas about how to make Food as Medicine initiatives successful.
Success Involves Many Stakeholders

Source: Academy Foundation – Food as Medicine in Retail Settings: A Comprehensive Guide to Program Evaluation
Next Steps to Make Progress

To download the report, please visit:

**FMI**
www.fmi.org

or

**Academy of Nutrition and Dietetics Foundation**
www.eatright.org/foodasmedicine
Questions And Answers