

Survey Report: Retailer Contributions to Health and Wellness

A message from Health & Wellness Vice
President, Cathy Polley:

For years, FMI and its members have recognized the need to help consumers navigate the abundance of health, wellness and nutritional offerings within today's supermarket. With health and wellness top-of-mind for our nation's grocery shoppers, supermarkets are uniquely positioned to help consumers appropriately blend their food, nutrition and medication needs.

Our *2012 Retailer Contributions to Health & Wellness Survey* results give us perspective on what FMI members are offering shoppers who are seeking healthier lifestyles. In response, retailers are providing wellness-focused programs that help customers improve their diets and overall health. The programs range from carrying more health and wellness specific products, educational programs, dietitian tips and cooking classes to hosting events to promote immunizations and health screenings.

I hope you find our report insightful and inspiring. FMI is confident that supermarkets across the U.S. will continue to lead our nation down the path to health and wellness.

Sincerely,



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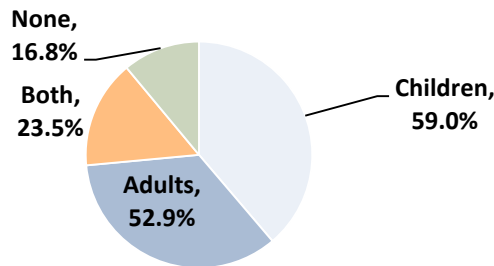
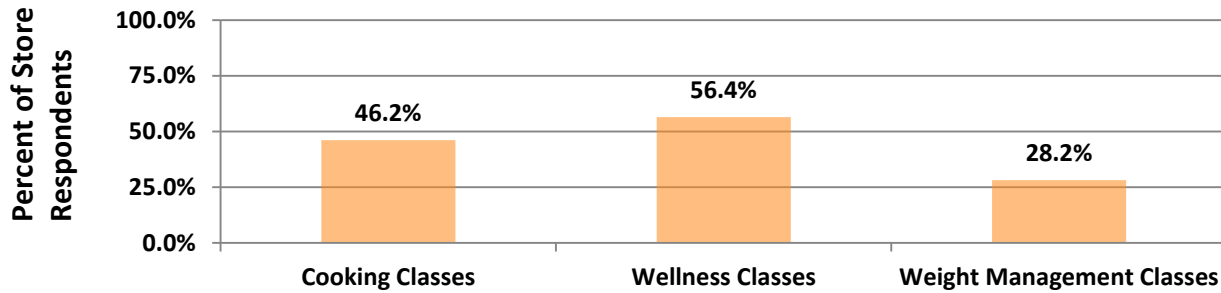
Survey Engineers

**The Health and Wellness
Council of FMI**

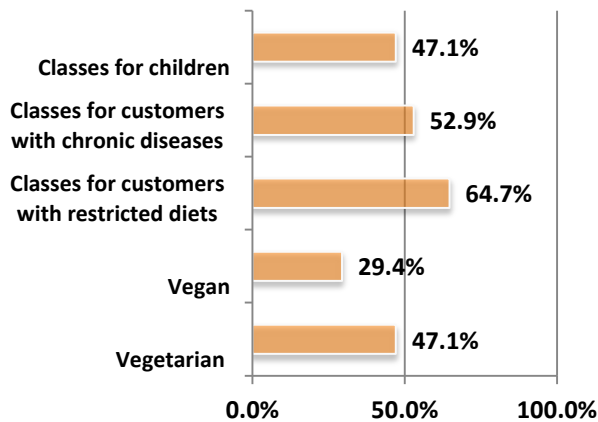
RESOURCES FOR CONCERNED CUSTOMERS

Nearly 50% of customers are confused by the conflicting information surrounding nutrition¹. Shoppers can look to the supermarket for some straight forward answers. A newly emerging trend, in-store classes, serves to educate customers.

Supermarkets Providing In-Store Classes



Weight management classes are primarily being offered to adults.



Supermarkets are providing cooking classes with a variety of focuses.

According to FMI's Speaks 2011 study, about 38.2% of retailers were providing cooking classes.

Supermarkets continue to offer more to the communities in which they serve than just a place to buy food for the week.

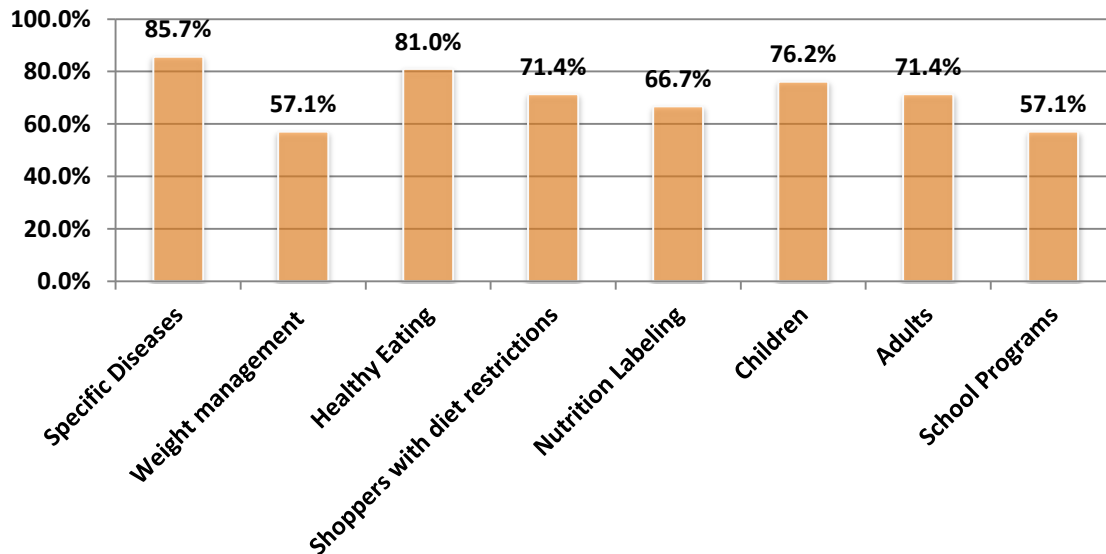
¹ Shopping for Health 2012

STORE TOURS

Guiding a customer through the store is a simple, yet effective way to acquaint them to what that retailer has to offer. Store tours can involve the whole community as well, with retailers taking a range of approaches from collaborating with school programs, scout programs, and the local hospital.

79% Of supermarkets provide store tours

Store Tours Targets



Store Tours as an Educational Opportunity

94% of the companies who have dietitians on staff reported that their store tours are led by dietitians. As seen above, specific disease states, healthy eating and diet restrictions are all significant focus areas.

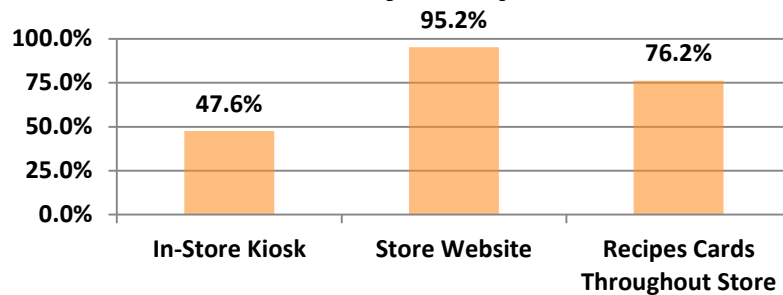
HELPING CUSTOMERS FIND INSPIRATION FOR HEALTHY MEALS

89.7% of retailers provide healthy recipes in some format. Providing healthy recipes to shoppers are effective as well, 57% of shoppers say they've tried a store's new healthy recipe in the last year²

² Shopping for Health 2012

According to Shopping for Health 2012, most customers first go to the internet for healthy eating ideas. 95.2% of food retailers have healthy recipes on their websites

Where Retailers Provide Healthy Recipes

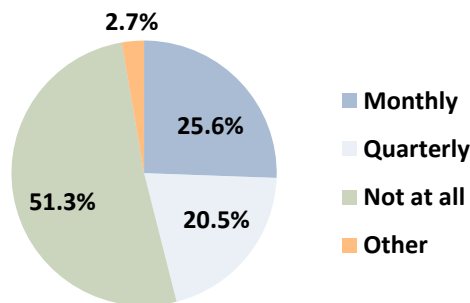


And that's not all.

Retailers reported their healthy recipes can also be found in their magazines, newsletters, flyers and by contacting their dietitians.

COMMUNICATING HEALTH AND WELLNESS

Supermarkets have taken initiative in being inventive about where customers can find health and wellness information.



46% of retailers publish some sort of health and wellness newsletter. Of those, 47.4% offer it electronically.

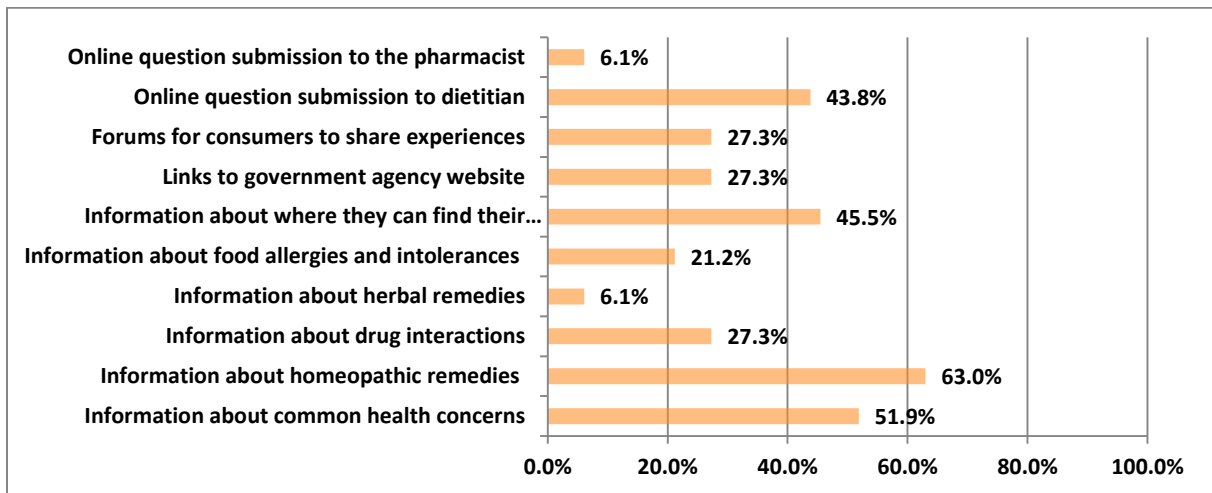
Healthy Recipes	85.7%
Nutrition Q&A	76.2%
Health Articles	81%
Customer Question Area	52.4%
Area for parents	28.6%
Area for children	33.3%
Area for seniors	9.5%

Nearly all retailers have a website with a specific area for health and wellness³. The websites boast a variety of features and information ranging from providing health articles to opening up discussions with an RD.

³ 96.8% of retailers have a website with a specific area for health and wellness.

Consumers can get their questions answered.

Supermarkets are offering programs for customers to sign up for additional information such as details about homeopathic remedies or common health concerns.

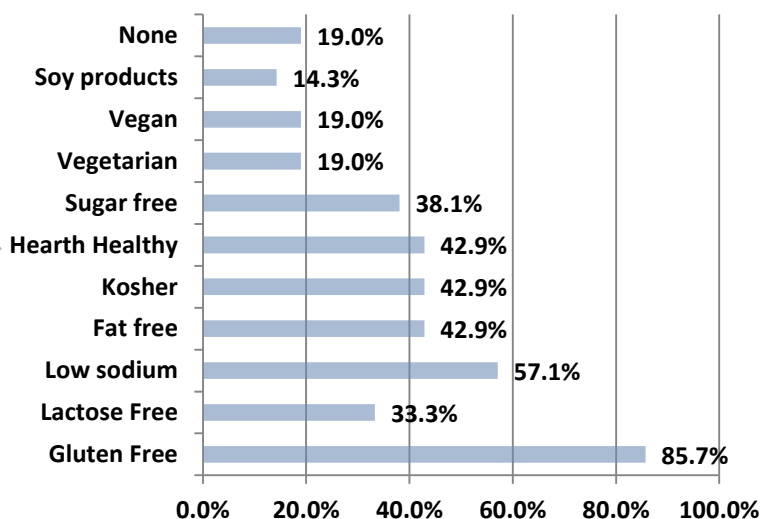


LABELING FOR HEALTH-CONSCIOUS CUSTOMERS

Shoppers are paying more attention to unhealthy ingredients vs. healthy ones⁴. For customers that are shopping with healthy eating or a disease state in mind, many supermarkets are adapting their labeling to those concerns.

More than three-quarters of shoppers say that maintaining or improving heart health is somewhat or very important to them*. 43% of retailers identify heart healthy products on the shelf.

Stores that identify the following products on the shelf



⁴ * Shopping for Health 2012

Consistent tagging systems in the supermarket.

50% of shoppers say that shelf tagging systems indicating healthy food would be helpful, and 63% of customers say that they are in favor of a single national nutrition scoring system⁵. In response, many retailers are starting to implement a nutrition labeling system.

How healthy products are displayed

Retailers have different strategies for displaying their healthy products. Most, however, disperse those products across the store

Displayed Together	19%
Dispersed Throughout the Store	85.7%
Have “healthy-for-you” aisle end-cap displays	51.3%

In the case of Gluten Free products, most are displayed together for shopping ease. This is not the case for sodium-free products which are generally dispersed across product categories in the store.

DIETITIANS IN THE SUPERMARKET

If consumers had to choose an expert to help them live healthier, most would choose a dietitian over a personal chef or even a personal trainer⁶. Today’s supermarket RD plays a unique role in every aisle of the store.

Supermarkets are employing registered dietitians more often than not.

Most are employed corporately or regionally, managing multiple stores.

In-store	33.3%
Regionally	52.4%
Corporately	85.7%
Consultants Only	4.8%
None	9.5%

43% of companies have online question submission to dietitians

Dietitians have an array of responsibilities and often don’t have a single focus, impacting corporate health and wellness strategy while *also* serving as a regional consultant to many stores.

59% of companies provide nutrition counseling

⁵ Shopping For Health 2012

⁶ Shopping for Health 2012

IN-STORE PHARMACIES ARE MORE THAN MEETS THE EYE

Pharmacies not only manage prescriptions –79% offer health screenings and 87% offer immunizations. The supermarket pharmacy is becoming a hub for health management and a resource for shoppers looking to identify foods that complement their medication therapy. Additionally, 37.5% of survey respondents indicate having an in-store clinic in at least one of their locations.

Blood Pressure	83%
Blood Sugar	75%
Body Mass Index	36%
Bone Density	36%

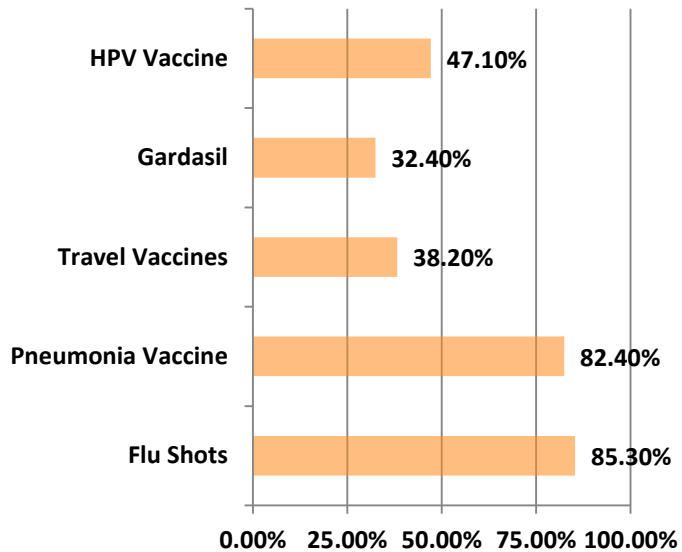
Supermarkets offer a variety of health screenings.

For customers looking to keep tabs on their blood pressure, most retailers can accommodate them.

Today’s supermarket pharmacists are helping to protect their patients’ health.

Pharmacists are vaccine advocates. In-store pharmacies provide accessibility to vaccinations and encourage collaboration with local prescribers and health departments, filling a critical role in the surrounding community. With pharmacists now allowed to immunize in all 50 states, FMI witnesses growing numbers of supermarkets offering immunizations with a wider array of vaccines.

In-Store Pharmacies Offer Certain Immunizations



*A vaccine not pictured in this graph that many retailers are starting to offer is Zostavax, the vaccine for shingles.

SUPERMARKETS ARE FAMILY FRIENDLY

Supermarkets not only feed the families and overtly promote health and wellness, but also strive to be family-friendly places. This is a lower-profile yet higher impact component of supermarket health and wellness efforts.



Candy-free check-out lanes	24.1
New Mother programs	37.9
Kid focused events	48.3
Area for parents on store websites	28.6
Area for children on store websites	33.3

Methodology

The data for *Retailer Contributions to Health and Wellness* was collected from an online survey sent to FMI membership between May and early July of 2012. Thirty-nine FMI member companies completed the survey with a pharmacist, a dietitian or a health and wellness executive answering in each case. Because the companies surveyed operate many stores, the information collected from this survey directly reflects thousands of stores nationwide. While not all operators were surveyed, the FMI Health and Wellness Department believes this sample represents health and wellness initiatives of the food retailers of the country. Even so, caution should be taken when directly comparing this year's data to past surveys or other surveys of the same nature.

Information used to supplement this report was taken from Shopping for Health 2012 and Speaks 2011. See the FMI store at www.fmi.org/store to view the entire reports.

Sample Description:

12.8% of the companies surveyed operated 2-10 stores, 17.9% operated 11-30 stores, 17.9% operated 31-100 stores, 38.5% operated 101-500 stores and 12.8 % operated more than 500 stores. One company operating one store was surveyed.

The annual revenue of the companies surveyed followed a similar distribution of company size. The location of the stores that the companies operate spanned across the United States. The most representation on the East Coast (52%) the least representation was on the West Coast (2%). The Midwest (20%) and the remaining regions comprised the rest.