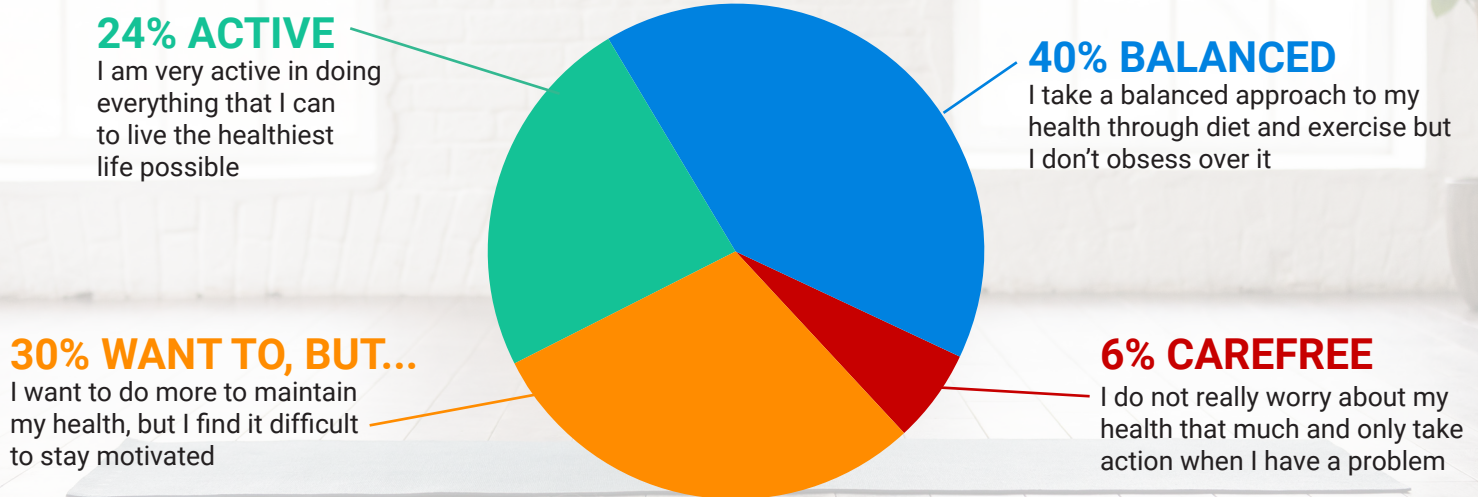


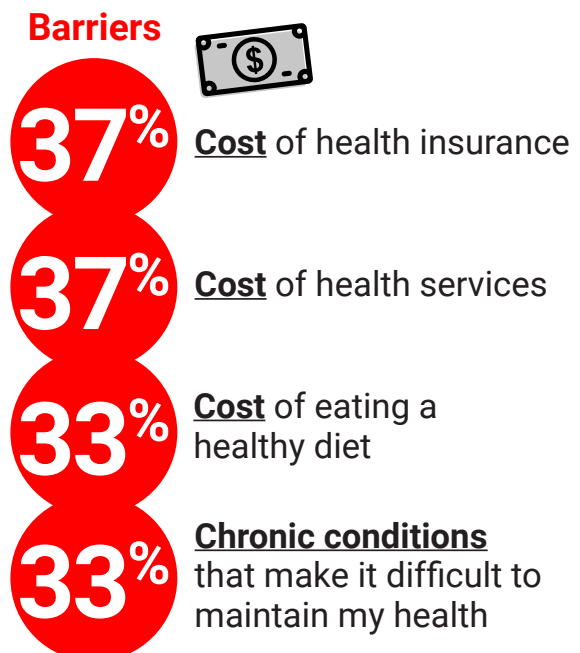
COVID-19 Has Elevated the Health and Wellness Trends of Recent Years



Nearly two-thirds of shoppers take a proactive approach to healthy living



Shoppers are highly motivated to stay healthy, but costs and chronic conditions can be barriers



These shopper segments manage their health very differently

ACTIVE

Very focused on eating right, exercising and looking their best; more likely to monitor their fitness, and to belong to a gym



BALANCED

Balanced approach to diet and exercise but not obsessed; more likely to have a pet and meditate for mental health



WANT TO, BUT...

Focused on adequate rest and relaxation; manage their health through checkups, prescriptions and OTC remedies



CAREFREE

Very little focus on health, though rest, relaxation and vacations are important

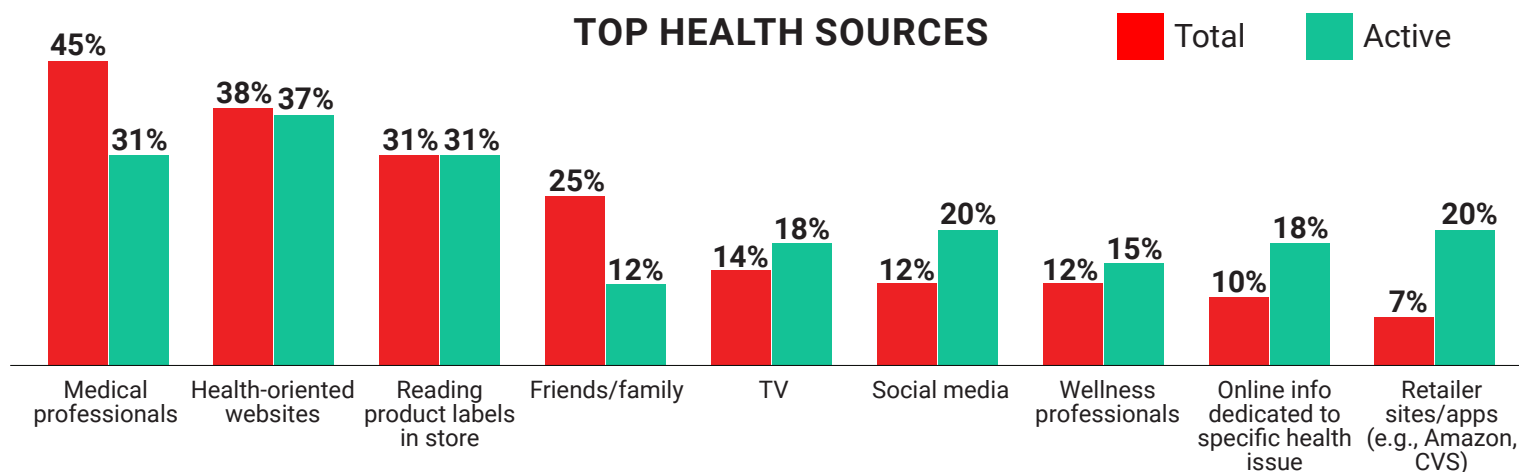


For most, self-care is aligned with healthy eating, regular checkups and regular exercise

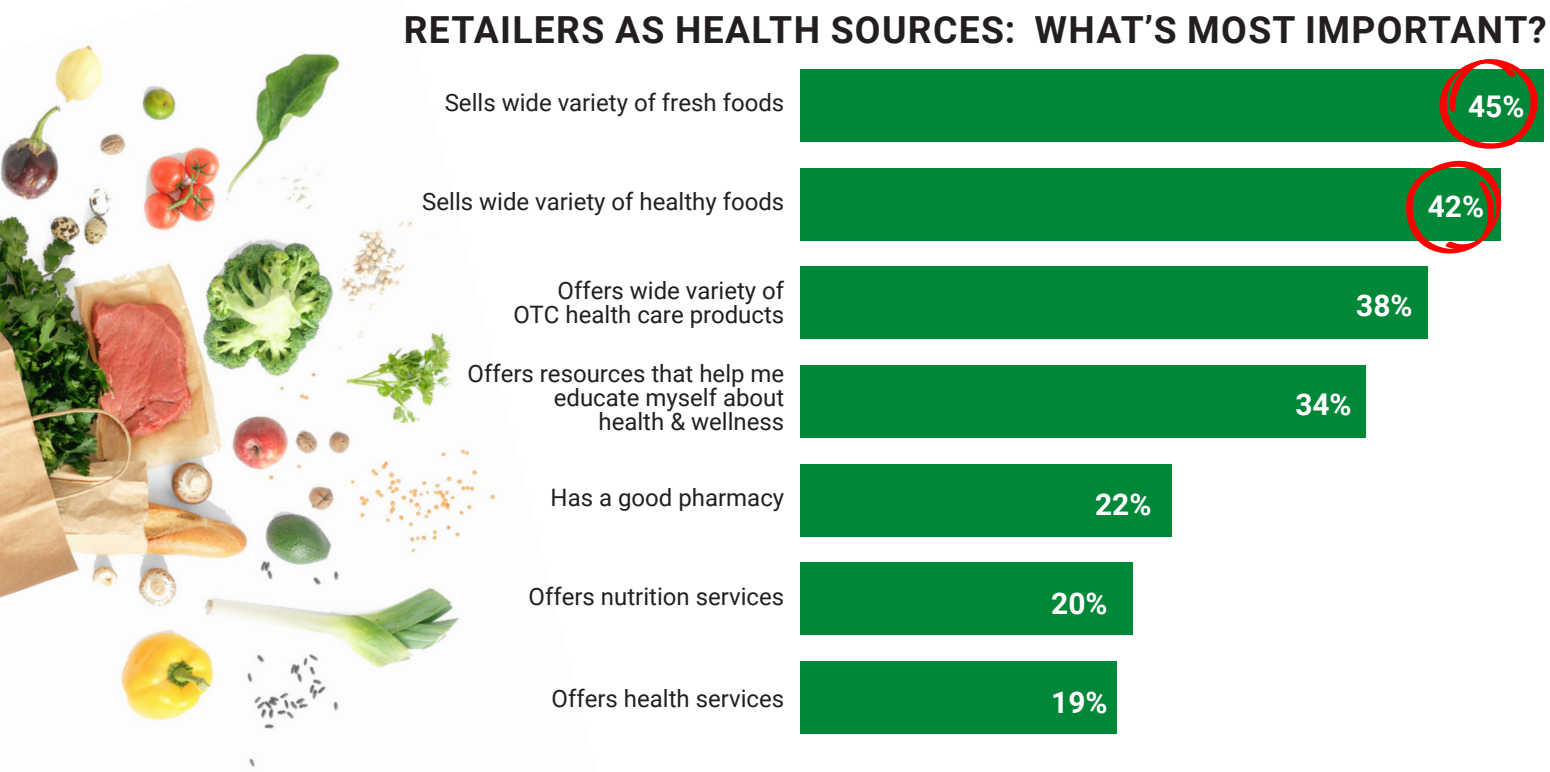


Shoppers are relying on product labels to guide their choices, in addition to medical professionals and health-oriented websites

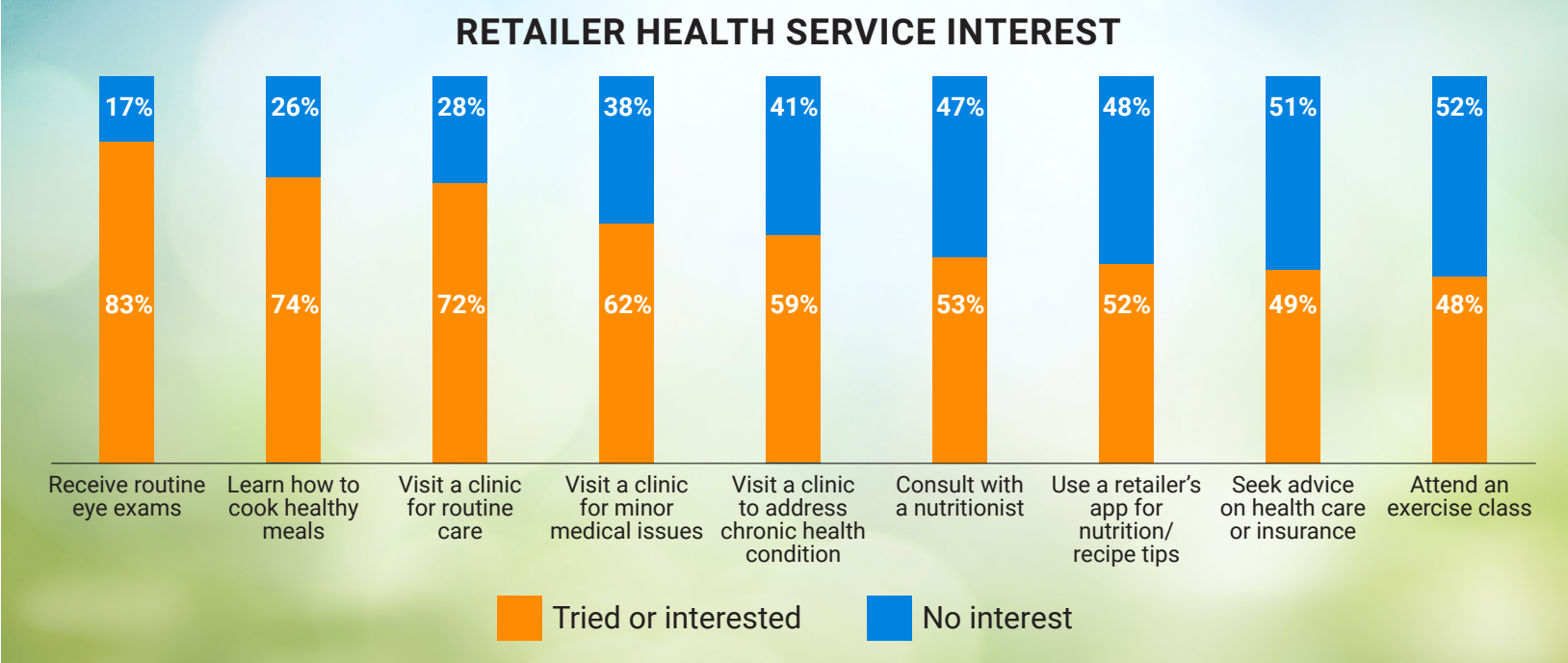
In contrast to other less-involved health & wellness segments, medical professionals are not the predominant information source among the “Active segment” who take charge of their health and turn to a variety of online sources.



Fresh and healthy foods are most important for a retailer to become a trusted health resource



Shoppers are interested in leveraging additional health services while at a store, especially routine health care



Capitalize on health & wellness trends to drive sales and shopper loyalty

KEY FINDINGS



Nearly two-thirds of shoppers take a proactive approach to living a healthy lifestyle, with nearly a quarter designating themselves as most “Active”



To manage physical health, nearly two-thirds of shoppers take vitamins, while half eat a healthy diet, exercise and get regular checkups



Healthy eating is very important to most shoppers, but cost is the biggest barrier to doing so

Nutrition Facts	
Serving Size	8oz (1/2)
Amount Per Serving	
Calories	Calories from Fat
	%Daily Value*
Total Fat	0g
Saturated Fat	0g
Trans Fat	0g
Cholesterol	0mg
Sodium	0mg
Total Carbohydrate	0g
Dietary Fiber	0g
Sugars	0g
Protein	0g
Vitamin A	0%
Vitamin B	0%
Vitamin C	0%
Vitamin D	0%

While medical professionals and health-oriented websites are the top source for health information, shoppers are also relying on product labels to guide their choices



Product information and discounts are the primary ways shoppers use retailer websites/apps, but the “Active” segment is also looking for health-oriented content.

IMPLICATIONS

Drive loyalty with these shoppers by bringing them health & wellness solutions that are most important to them

Optimal execution on Vitamin assortment, shelving, merchandising and pricing are table stakes to win a health & wellness shopping trip

Better educate shoppers on ways to eat healthily on a budget and/or how to save on featured products like larger sizes, value packs, sales items etc.

Manufacturers have opportunity to convert more shoppers through optimized product labeling with the information most important to their shoppers

Opportunity for retailers to win with shoppers online by delivering better health-oriented content and product information on their websites/apps