



Academy of Nutrition
and Dietetics
Foundation



**THE FOOD
INDUSTRY
ASSOCIATION**

THE FOOD AS MEDICINE OPPORTUNITY IN FOOD RETAIL





Published by:
FMI
The Food Industry Association
2345 Crystal Drive, Suite 800
Arlington, VA 22202
and
Academy of Nutrition and Dietetics Foundation
120 South Riverside Plaza, Suite 2190
Chicago, IL 60606-6995

Prepared by:
David Orgel
David Orgel Consulting LLC

Copyright © 2021 | FMI, The Food Industry Association | Academy of Nutrition and Dietetics Foundation

All rights reserved. This publication may not be reproduced, stored in any information or retrieval system or transmitted in whole or in part, in any form or by any means — electronic, mechanical, photocopying, recording or otherwise — without the express written permission of FMI.

For questions or comments, please contact:

- » FMI, Steve Markenson, Director, Research & Insights at smarkenson@fmi.org
- » Academy of Nutrition and Dietetics Foundation, Allison Yoder, Nutrition in Food Retail Program Development Fellow at ayoder@eatright.org
- » FMI, Krystal Register, Director, Health & Well-being at kregister@fmi.org

About FMI

As the Food Industry Association, FMI works with and on behalf of the entire industry to advance a safer, healthier and more efficient consumer food supply chain. FMI brings together a wide range of members across the value chain — from retailers that sell to consumers, to producers that supply food and other products, as well as the wide variety of companies providing critical services — to amplify the collective work of the industry. **www.fmi.org**.

Academy of Nutrition and Dietetics Foundation

The Academy of Nutrition and Dietetics Foundation is a 501(c)3 charity dedicated exclusively to supporting nutrition and dietetics professionals by empowering them to help consumers live healthier lifestyles. It makes an impact with Academy members and throughout the profession with its scholarships, awards, research grants, fellowships, public education programs and disaster relief efforts. Through philanthropy, the Foundation empowers current and future food and nutrition practitioners to optimize global health. Visit the Foundation at www.eatrightFoundation.org.

Support for the project was funded through a grant from Walmart to the Academy of Nutrition and Dietetics Foundation.



CONTENTS

<i>Executive Summary: The Food as Medicine Opportunity</i>	<i>4</i>
<i>Methodology</i>	<i>5</i>
<i>Introduction: A Changing Health and Well-Being Landscape.....</i>	<i>6</i>

1 UNDERSTANDING THE OPPORTUNITY	7
<i>Consumers Seek Benefits from Food</i>	<i>7</i>
<i>The Time is Right for Food as Medicine</i>	<i>9</i>
<i>Consumers Communicate Positive Perspectives.....</i>	<i>10</i>
<i>Retailers Relay Positive Feedback</i>	<i>13</i>

2 CLARIFYING THE CONCEPT	14
<i>Defining Food as Medicine.....</i>	<i>14</i>
<i>FMI Policy on Food as Medicine.....</i>	<i>16</i>
<i>Retailer Programming Supports the Concept.....</i>	<i>17</i>
<i>Retailers Face Competition in Advancing Efforts</i>	<i>18</i>
<i>Crucial Role of Registered Dietitian Nutritionists</i>	<i>19</i>

3 STRATEGIES FOR SUCCESS.....	20
<i>Five Retail Program Models to Drive Efforts.....</i>	<i>20</i>
<i>Key Target Shoppers</i>	<i>23</i>
<i>Entering the “Zone of Innovation”</i>	<i>23</i>
<i>Do’s and Don’ts to Boost Credibility.....</i>	<i>25</i>

4 MEASUREMENTS AND NEXT STEPS.....	26
<i>Success Involves Many Stakeholders.....</i>	<i>26</i>
<i>Importance of Evaluating Efforts</i>	<i>27</i>
<i>Next Steps to Make Progress.....</i>	<i>27</i>
<i>List of Resources for More Information.....</i>	<i>28</i>



EXECUTIVE SUMMARY: THE FOOD AS MEDICINE OPPORTUNITY

The time is right to embrace the Food as Medicine concept, which directly ties into consumer aspirations to enhance their health and well-being through food.

Food retailers have a unique opportunity to make progress with helping consumers on their health and well-being journeys at a time when consumers are focusing more on this topic.

Food retailers are pursuing Food as Medicine programs, even if they aren't labeling them as such. Moreover, the concept already exists in health care, public health policy and legislation and other areas.

This report, produced in collaboration between FMI and the Academy of Nutrition and Dietetics Foundation (Academy Foundation), outlines the business case and the importance of gaining traction on this effort within food retail. The following are key points and insights relayed.

- ▶ **Opportunity:** The Food as Medicine opportunity is underscored through key findings from consumer and retailer surveys.
- ▶ **Definition:** A highly useful definition of Food as Medicine is presented. This definition was developed and adopted by the Academy of Nutrition and Dietetics (Academy) and its Foundation and supported by an FMI board policy. It incorporates focus areas including disease prevention and management, nutrition security and food safety.
- ▶ **Competition:** Food retail has an opportunity to further advance Food as Medicine initiatives, but faces growing competition from a range of non-retail models pursuing this concept. As a result, food retailers could miss opportunities through inaction.
- ▶ **Leadership:** Registered dietitian nutritionists (RDNs) are in the best position to lead Food as Medicine efforts at food retail. However, to help ensure success, the concept needs buy-in and engagement throughout retail organizations, including from executive leaders and chief merchants.
- ▶ **Execution:** Suggested food retail program models, target shoppers, and evaluation approaches are discussed in this report.
- ▶ **Advancement:** Opportunities connecting food to health predicted to move into the "Zone of Innovation" are identified based on a unique digital ethnography study.
- ▶ **Next Steps:** As retailers consider advancing Food as Medicine programs, they can benefit by asking self-assessment questions about their organization's strategies. These are addressed at the end of the report.

NEW TO FOOD AS MEDICINE?

*Jump to page
14 for the full
definition*



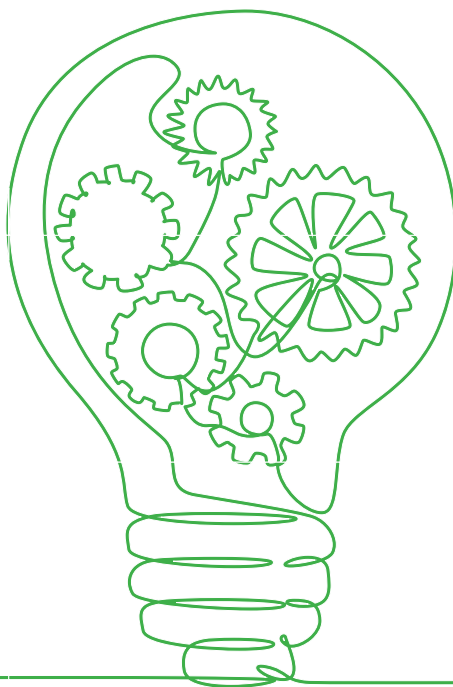
METHODOLOGY

This report benefits from a multi-level research methodology that includes the following:

- ▶ A survey conducted among FMI domestic food retail members in March through April 2021, with respondents representing over 26,000 stores, ranging in size from small to large.
- ▶ An FMI survey of consumers on Food as Medicine, based on a nationally representative sample of 1,402 adults in the United States who are 18 years or older, from April 30 through May 31, 2021.
- ▶ Input about the concept of Food as Medicine from a cross-section of RDNs who operate in retail food environments.
- ▶ Digital ethnography research from The Center for Food Integrity/MotivBase that identifies consumer “micro-cultures” and areas of demand for retailers.⁷

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

The report is part of a series of content pieces from FMI and the Nutrition in Food Retail Program Development fellowship through the Academy Foundation that helps raise the profile of Food as Medicine. These are cited in the text and a full list of resources is included at the end of the report.





INTRODUCTION: A CHANGING HEALTH AND WELL-BEING LANDSCAPE

The consumer definition of food value goes beyond taste, price and convenience and now includes health and well-being.¹ Consumers and food retailers have been increasing their focus on health and well-being, a trend that has accelerated during the COVID-19 pandemic.

- ▶ **Consumers Advance Priorities:** Health and well-being was already undergoing shifts leading up to the pandemic, as consumers of all generations were starting to pay more attention to health strategies such as personalized nutrition, “better for you” and food as medicine. During the pandemic, consumers have focused on these areas and reported paying more attention overall to improving nutrition, health and self-care, as outlined in FMI’s *The Power of Health and Well-Being in the Food Industry*.²
- ▶ **Behavior Shifts Endure:** FMI’s 2021 *U.S. Grocery Shopper Trends*³ — which was based partly on a national consumer survey conducted in February of 2021 — found many consumers reported eating healthier than at the start of the pandemic, although consumers still saw room for improvement.³ Meanwhile, FMI’s *U.S. Grocery Shopper Trends Tracker: Back to School/Back to Office*,⁴ based on a national consumer survey conducted in August 2021, found 35% of consumers say they are eating healthier now than before the pandemic. The same percentage of consumers cited their approach to eating healthy as an area of their lives that has permanently changed due to the pandemic.⁴
- ▶ **Positives for Food Retail:** Retailers report that the consumer’s embrace of health and well-being is beneficial to their businesses — a point emphasized in the 2021 edition of FMI’s *The Food Retailing Industry Speaks*.⁵ Some 77% of retailer respondents to the *Speaks* survey said consumers’ focus on health and well-being is having a positive impact. Likewise, the consumer trend of leveraging food to manage or avoid health issues, which ties into the concept of Food as Medicine, is viewed as a positive for business by 70% of responding retailers.⁵
- ▶ **Sharp Growth in Retail Programs:** Half of FMI food retailer members who responded to a 2021 survey about retailer health and well-being initiatives said their company’s health and well-being programs and activities have increased significantly or moderately since 2019. Further, 54% said the pandemic shifted the focus of health and well-being programs — with 31% pointing to a greater emphasis on health and well-being activities. These details are included in the 2021 FMI report *Retailer Contributions to Health and Well-Being*.⁶



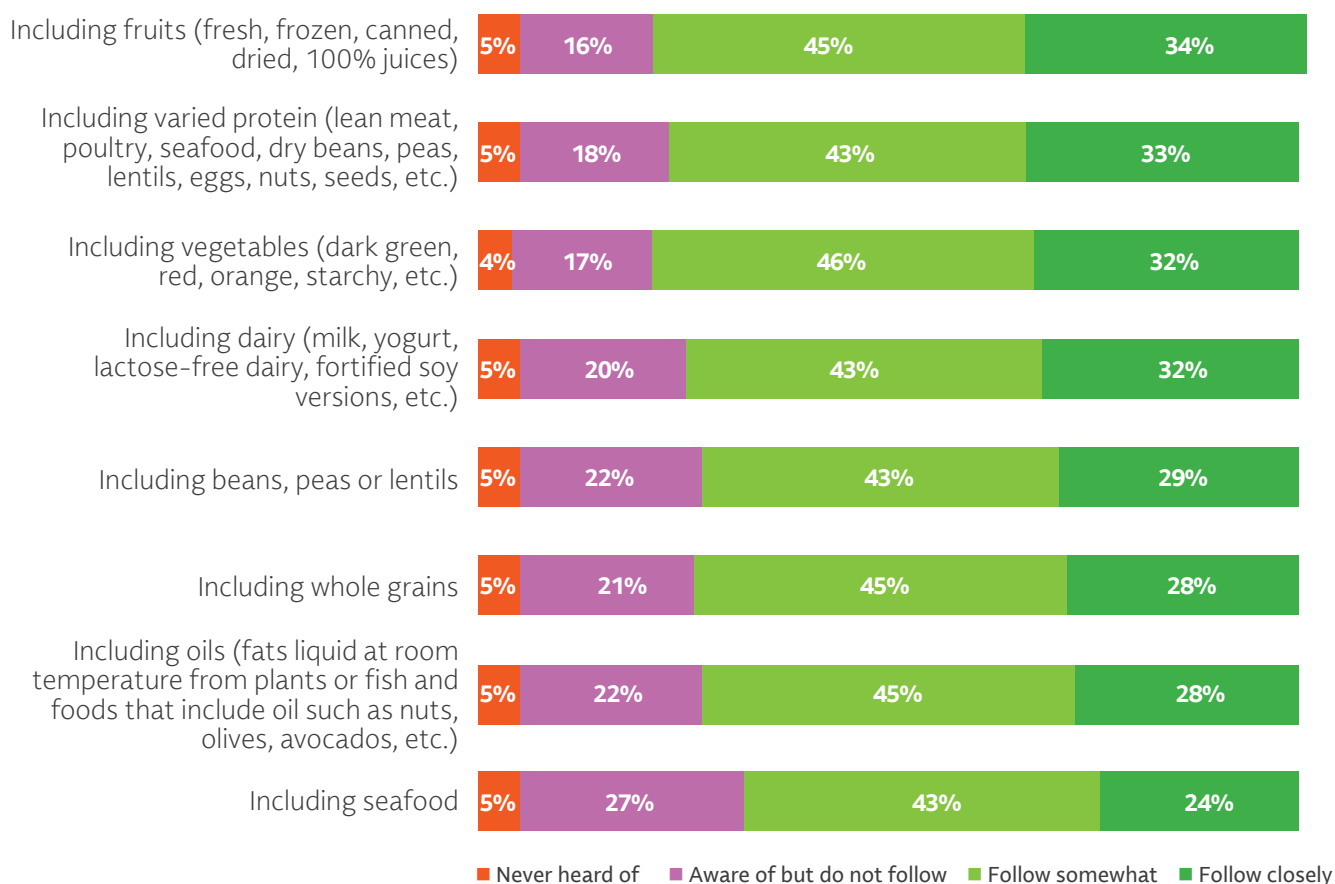
1

UNDERSTANDING THE OPPORTUNITY

CONSUMERS SEEK HEALTH BENEFITS FROM FOOD

CONSUMERS ARE LEVERAGING FOOD to promote health and well-being and manage diseases, based on responses to an FMI national survey on Food as Medicine, conducted earlier this year.

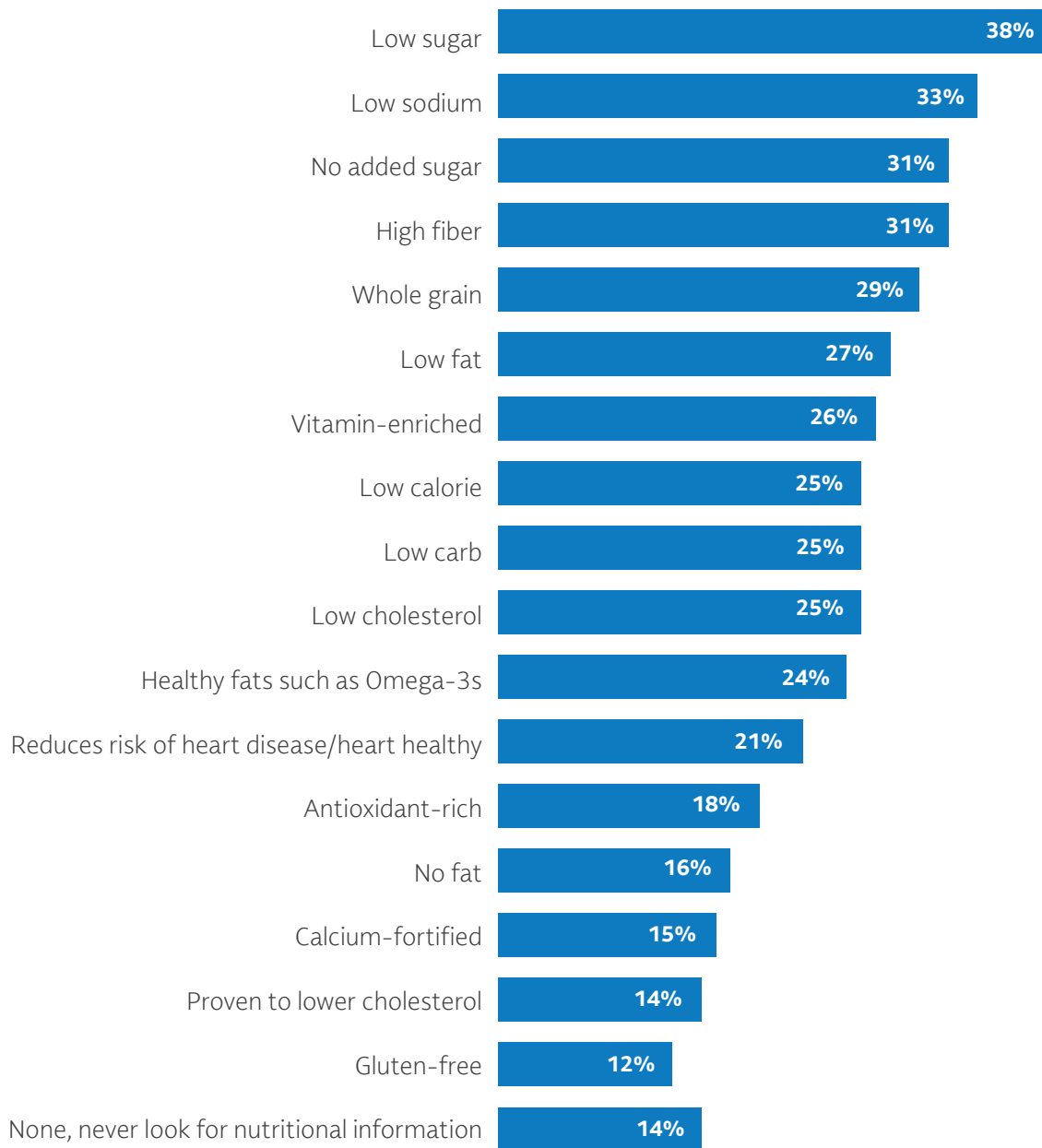
DEGREE TO WHICH AMERICANS INCLUDE FOOD GROUPS FOR HEALTH BENEFIT



This chart shows how consumers are somewhat or closely following eating approaches aligned with the *Dietary Guidelines for Americans*.

- 79%** Including fruits for heart health, antioxidant or dietary fiber benefits
- 75%** Including dairy for bone health (calcium), protein, blood pressure or other nutrients (potassium)
- 76%** Including varied protein for lean protein or specific vitamins or minerals.
- 73%** Including whole grains for heart health, diabetes management or dietary fiber benefits

**NUTRITIONAL INFORMATION CONSUMERS LOOK FOR WHEN
PURCHASING OR EATING FOOD PRODUCTS**



This chart shows consumers are seeking nutritional information to support their eating goals. The top attributes for which they are seeking information are low sugar (38%), low sodium (33%), no added sugar (31%) and high fiber (31%).



THE TIME IS RIGHT FOR FOOD AS MEDICINE

More than 48 million households in the United States include an individual living with a disease managed through diet, such as overweight/obesity, diabetes or heart disease, according to Nielsen data cited in the report *Food as Medicine Retail Nutrition Landscape* by the Academy Foundation.¹ These households represent 60% of Americans and represent about \$268 billion in annual grocery sales.

The Academy Foundation's report discusses the history of Food as Medicine and why it is now increasing in importance.

“The concept of Food as Medicine is not new — it is rooted in our most ancient of healing traditions. In 400 BC, Hippocrates was first quoted saying, ‘Let food be thy medicine and medicine be thy food.’ The Dietary Guidelines for Americans recommend building a healthy eating pattern, which means choosing a variety of nutritious foods in the appropriate amounts and making these choices as part of an individual’s everyday routine. Food as Medicine recognizes the influence of a healthy eating pattern on overall health, while also focusing on the ability to access healthy and affordable food as well as an individual’s awareness, knowledge and skill of preparing wholesome, nutrient-dense meals.”¹

Food as Medicine is addressed in a blog by Krystal Register, MS, RDN, LDN, FAND, FMI’s Director of Health and Well-being.

“At a time when we know there is growing consumer interest in eating better to strengthen immunity and prevent disease, it is appropriate to talk about the role of food in the context of medicine, as food can be used to prevent disease and promote health, manage chronic conditions and simply nourish,” she wrote.⁶

Allison Yoder, MA, RDN, LD, the Academy Foundation’s Nutrition in Food Retail Program Development Fellow, said the Food as Medicine concept lines up well with the goals of food retail. “Who better to talk about Food as Medicine than food retailers, supported by their registered dietitians — the food and nutrition experts?”

The concept of Food as Medicine exists in many fields — including in health care and the health insurance sector.

The Food as Medicine culture is driven by consumers, particularly those 25 to 44 years old, middle class and educated, according MotivBase, a research partner of The Center for Food Integrity that leverages digital ethnography. These consumers value healthy living and are motivated to enhance their longevity.⁷ It is important to note that the individuals driving this culture aren’t necessarily the people most affected by it. Although the middle class is driving this culture, changes within it impact the lower and upper classes as well.⁸

There is a growing opportunity for food retailers to act as a catalyst to scale Food as Medicine programs. Food retailers are established as trusted partners in a customer’s shopping journey, providing multiple touch points and interactions with customers — from in-store to online.

CONSUMERS COMMUNICATE POSITIVE PERSPECTIVES

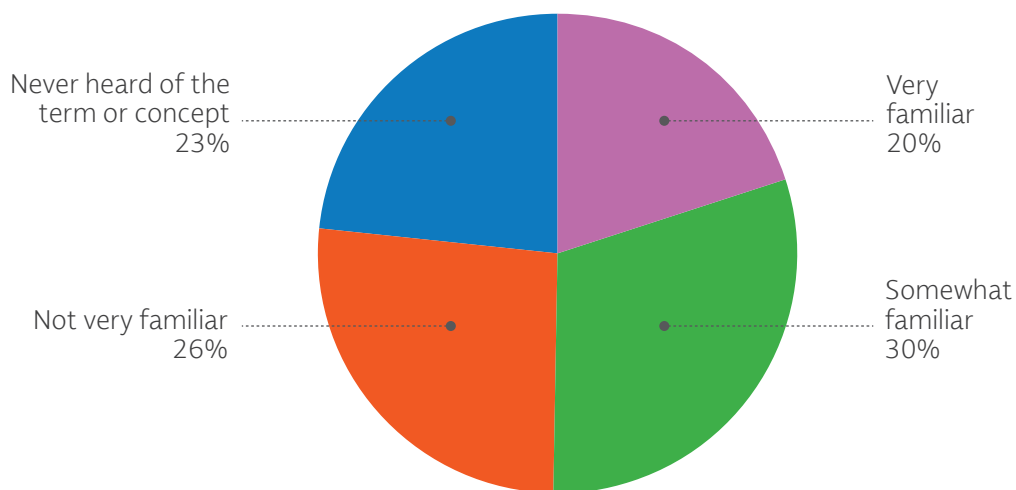
The term “Food as Medicine” elicits many positive associations from consumers. Consumers responding to the FMI national survey on Food as Medicine were asked, **“When you hear the term Food as Medicine, what comes to mind?”**

CONSUMER RESPONSES



These generally positive associations show up despite the fact that only about half of consumers are very or somewhat familiar with the concept, as outlined in the following chart.

**FAMILIARITY WITH THE TERM OR CONCEPT OF FOOD AS MEDICINE
BEFORE HEARING THE DEFINITION**

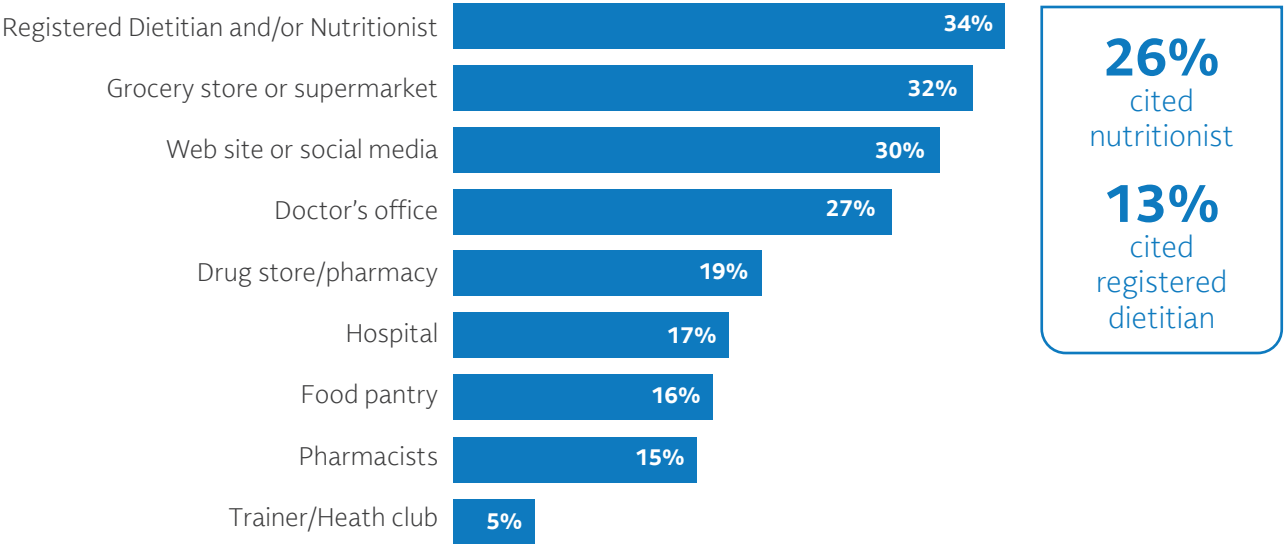


Here's a deeper dive into which consumers were most familiar with the term Food as Medicine:

- ▶ Males were slightly more familiar than females (57% vs. 45%)
- ▶ Younger consumers led older ones (Millennials 72%, Gen X 61%, Gen Z 55% vs. Boomers 28% and Silent Gen 23%)
- ▶ Those with children were almost twice as likely to be familiar as those without (68% vs. 37%)
- ▶ Higher-income consumers were most familiar (led by \$100,000+ at 64%)
- ▶ Those identifying as minorities were more familiar than non-minorities (57% vs. 47%)

Consumers were asked where they became familiar with the term “Food as Medicine,” and the top sources were registered dietitian and/or nutritionist followed by grocery store or supermarket.

SOURCE OF FAMILIARITY WITH TERM FOOD AS MEDICINE



34% of respondents cited registered dietitian and/or nutritionist, a point that underscores the important role of these health professionals.



RETAILERS RELAY POSITIVE FEEDBACK

A 2021 survey conducted among FMI domestic food retail members communicated generally positive associations with the concept.

Survey respondents were asked, **“When you hear the term Food as Medicine, what do you think of?”**

*Responses included words such as **health**, **better-for-you** and **preventive**.*

Here are a few of the other retailer comments:⁶

RETAILER ASSOCIATIONS WITH THE TERM FOOD AS MEDICINE



The following retailer comment relayed a big-picture view of the concept:

"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."

2

CLARIFYING THE CONCEPT

DEFINING FOOD AS MEDICINE

THE ACADEMY'S BOARD OF DIRECTORS approved a conceptual definition for Food as Medicine in February 2021. The definition was generated from a scoping review⁹ of food retail nutrition programs and outcomes. The definition is now included in the Academy's Definition of Terms,¹⁰ which is a resource that houses terms, definitions, and key considerations to support the profession of nutrition and dietetics.

CONCEPTUAL DEFINITION FOR FOOD AS MEDICINE¹⁰



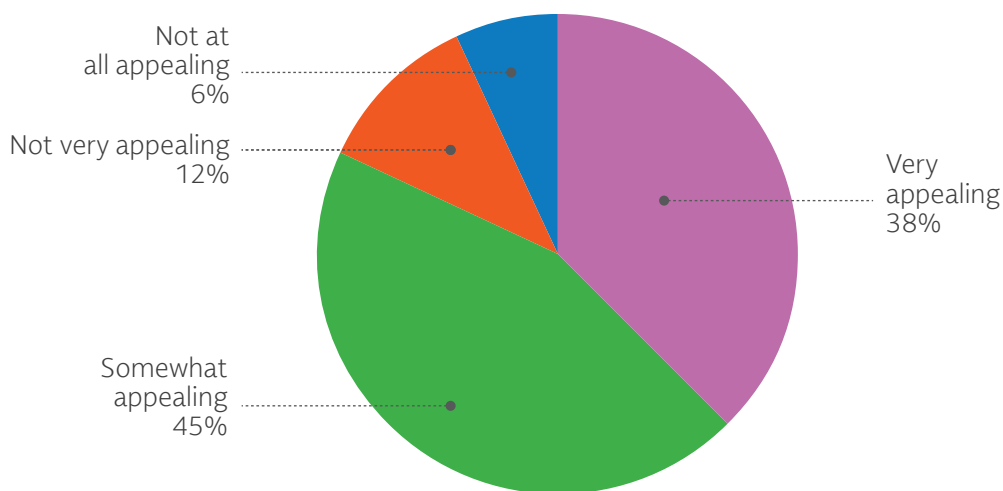
Consumer survey respondents expressed much more familiarity with the term Food as Medicine after they heard the formal Academy definition.

At that point, 71% said they were either somewhat or very familiar with the term, compared to 50% before hearing the definition.

An even higher percentage said they find the concept very or somewhat appealing after hearing the description.

HOW APPEALING IS THE CONCEPT OF FOOD AS MEDICINE TO YOU?

APPEAL OF FOOD AS MEDICINE CONCEPT AFTER HEARING THE DEFINITION



Some 38% found it very appealing and 45% somewhat appealing – which means more than 80% relayed positive feedback.

Consumers who said Food as Medicine is appealing were asked to explain why. Here's a word cloud showing the emphasis areas of those who considered it very appealing. This cloud excludes the words "food" and "medicine" in order to spotlight a greater variety of feedback.

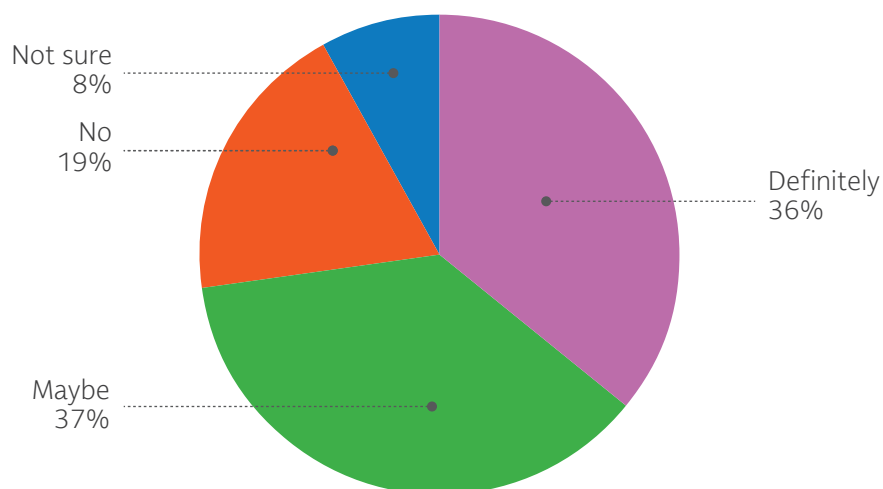
REASON FOOD AS MEDICINE IS APPEALING



This visualization shows that consumers finding the concept very appealing with emphasized words including healthy, eat, body, disease and good.

Consumers also were asked if they want to learn more about the concept of Food as Medicine.

INTEREST IN LEARNING MORE ABOUT FOOD AS MEDICINE CONCEPT



More than a third of consumers — 36% — said they definitely want to learn more, while 37% said maybe. Some 8% were unsure, and 19% said no.

FMI POLICY ON FOOD AS MEDICINE

In February 2021, FMI developed a policy statement in support of the Academy's conceptual definition for 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," the statement reads.¹¹

Among key points in the statement:¹¹

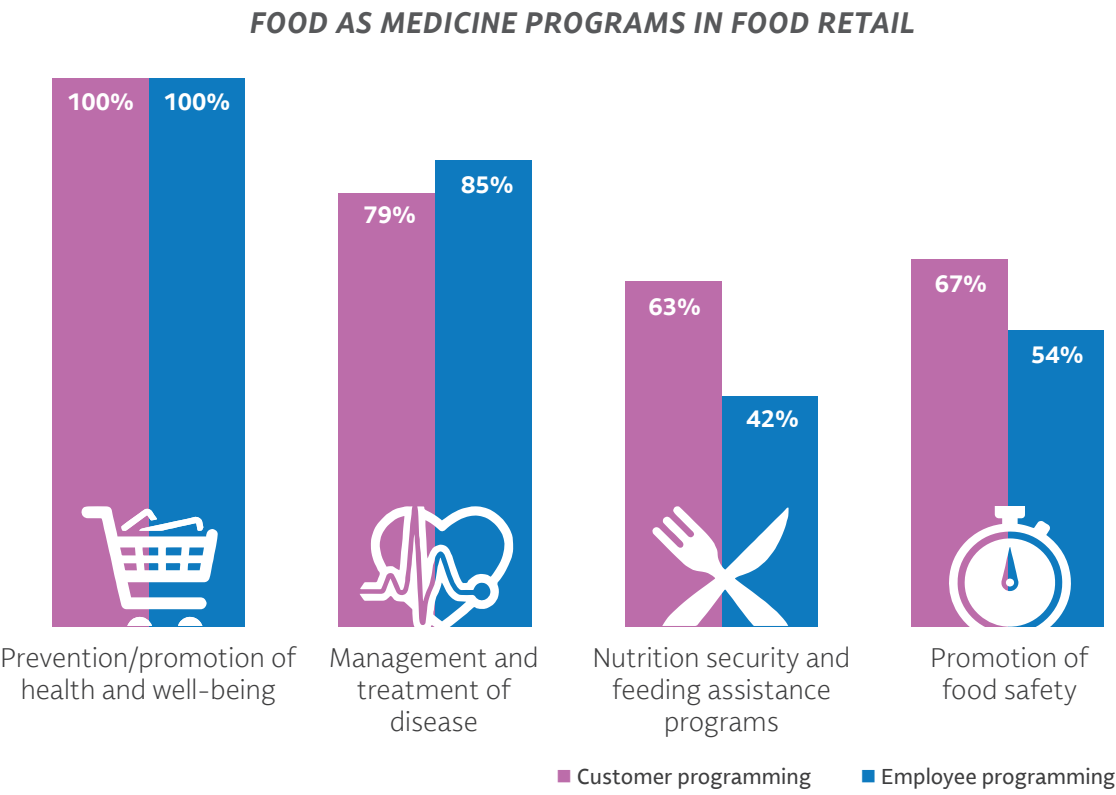
- ▶ Food as Medicine programs must be grounded in credible research and science, free of unfounded health claims.
- ▶ Food as Medicine programs should not undermine the importance of prescribed drugs.
- ▶ Food should be used to promote health in combination with necessary medications.

Food as Medicine programs must be grounded in credible research and science, free of unfounded health claims.

RETAILER PROGRAMMING SUPPORTS THE CONCEPT

Food retailer health and well-being programs line up well with the definition of Food as Medicine.

Retailers relayed details about their programs as part of the previously mentioned survey conducted among FMI domestic food retail members. The findings cover programming in each of the four components of Food as Medicine — for both customers and employees. The following charts show the percentage of retailers that have these types of programming and the proportion of total programming it represents.



These results show many food retailers are prioritizing customer- and employee-facing programs that align with the definition of Food as Medicine, even if they are not specifically referring to them as Food as Medicine efforts.

RETAILERS FACE COMPETITION IN ADVANCING EFFORTS

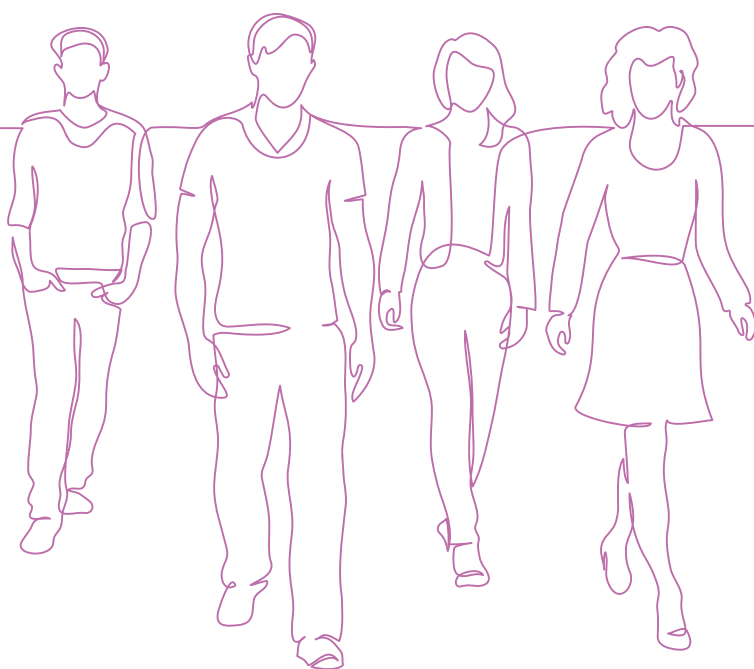
Food retailers are making progress in advancing programs that align with Food as Medicine. However, they do not have the field to themselves.

Retailers face growing competition from other sources. For example, co-location of food pantries and health centers is increasingly common, according to the comprehensive evaluation guide that will be available from the Academy Foundation in November 2021.⁸ Food banks, farmers markets, mobile markets and community supported agriculture programs are also adopting Food as Medicine interventions and using the terminology when referring to these programs.

Programs that leverage Food as Medicine should do so responsibly — in aspects ranging from offerings to marketing — in order to maintain credibility. They should be in alignment with the science-based Academy definition.

The Academy Foundation's guide expresses an urgency for food retailers to step up their involvement in Food as Medicine.

“As Food as Medicine continues to gain traction, food retailers must be part of the solution. Inaction may result in a missed opportunity, reduced sales and increased competition in an industry with already thin profit margins. 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.”⁸



CRUCIAL ROLE OF REGISTERED DIETITIAN NUTRITIONISTS

Registered dietitian nutritionists (RDNs) are the ideal candidates in food retail to build consumer trust and loyalty through Food as Medicine initiatives — whether or not retailers specifically refer to these initiatives using the Food as Medicine term.

FMI's 2021 *U.S. Grocery Shopper Trends* research³ found that 47% of shoppers rate RDNs as being on their side when it comes to helping them stay healthy. That rating is relatively high — on par with “primary” food store (48%) and grocery store pharmacists (45%), and ahead of health insurance companies (41%), government institutions (35%) and manufacturers/food processors (31%).

The program evaluation guide from the Academy Foundation emphasizes that RDNs should play a key role in Food as Medicine initiatives at retail. The guide outlines some specific ways RDNs can drive these efforts, which include the following:⁸

- ▶ 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 employee 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

Collaborate with internal and external partners to increase food access and improve nutrition security



3 STRATEGIES FOR SUCCESS

FIVE RETAIL PROGRAM MODELS TO DRIVE EFFORTS

THE ACADEMY FOUNDATION conducted a scoping review⁹ to gain a better understanding of Food as Medicine programs. Five models were identified that demonstrate how Food as Medicine programs can be applied to the food retail setting.



Retailers have an opportunity to further enhance success by strategically combining program models, operating more than one model to support a specific initiative and by collecting and reporting metrics to their stakeholders. The combination of program models demonstrate improved results, including positive health outcomes and return on investment (ROI).

Following are details of each program model and feedback from consumer survey respondents.

PRESCRIPTION PROGRAM

Description: A prescription program operates like a traditional prescription program, where an RDN or health professional prescribes food. Prescriptions can come in the form of coupons, or vouchers with monetary value or as a standard prescription that can be presented to a food store. In these programs an RDN or health professional identifies at-risk patients, such as based on health conditions and/or a qualifying food security screening.





INCENTIVE PROGRAM

Description: Food incentive programs range from offering coupons and vouchers to discounted pricing on food categories such as fruits and vegetables as well as rebates (in the form of cash incentives and discount coupons). They aim to reduce the economic challenges that some food-insecure families face when buying wholesome, nutrient-rich foods. However, not all incentive programs are directed to food-insecure individuals. Examples of this might include digital coupons via customer loyalty programs to try new products or discounts for employees that link to nutrition messaging.

EXAMPLES OF PROGRAMS

- ▶ Food incentive programs that provide coupons and vouchers, discounted pricing on food categories (fruits and vegetables) or rebates.
- ▶ Food incentive programs that provide incentives or disincentives on food purchases (taxes on certain items).

CONSUMER FEEDBACK ON FOOD INCENTIVE PROGRAMS WITH COUPONS OR VOUCHERS

38%

said one or more stores they regularly shop offer this

62%

of those whose stores offer incentive programs have participated or used it

72%

of all respondents find food incentive programs somewhat or very appealing



MEDICALLY TAILORED NUTRITION

Description: Medically tailored food or meal programs can provide a more comprehensive therapy for patients. A registered dietitian or other health professional writes a prescription for a patient to receive tailored meals or boxes of food that align with their health condition or diagnosis. Meals are typically provided as ready-to-eat and personalized, quite often under the expert guidance of an RDN, and then delivered to customers with complex medical issues.

EXAMPLES OF PROGRAMS

- ▶ Medically tailored meal programs
- ▶ Medically tailored food programs

CONSUMER FEEDBACK ON MEDICALLY TAILORED FOOD OR MEAL PROGRAMS

29%

said one or more stores they regularly shop offer this

67%

of those whose stores offer medically tailored food or meal programs have participated or used it

62%

of all respondents find this type of program somewhat or very appealing

Medically tailored meal programs are often combined with Medical Nutrition Therapy (MNT) conducted by registered dietitians to manage and treat disease, ensuring the best possible nutrition-related health outcomes.



PATH-TO-PURCHASE MARKETING

Description: Path-to-purchase marketing programs are designed to produce behavior or environmental changes when shoppers are buying food. Behavior change includes increased awareness and knowledge, and environmental change includes improved availability and/or affordability of nutrient-rich foods.

EXAMPLES OF PROGRAMS

- ▶ Signage and displays focused on health and nutrition
- ▶ Information provided on grocery store app or website about health and nutrition
- ▶ Nutrition attribute labeling program for in-store or online shopping
- ▶ Ability to search or filter search results by nutrition information when shopping online
- ▶ In-store or virtual food/cooking demonstrations
- ▶ Consumer food safety education
- ▶ Traditional or virtual media interviews and promotions

CONSUMER FEEDBACK ON SIGNAGE AND DISPLAYS FOCUSED ON HEALTH AND NUTRITION (ONE OF THE PATH-TO-PURCHASE MARKETING STRATEGIES)

43%

said one or more stores they regularly shop offer this

67%

all respondents find this type of program somewhat or very appealing

65%

of those whose stores offer path-to-purchase marketing programs have participated or used them



PERSONALIZED NUTRITION EDUCATION

Description: Personalized Nutrition Education programs are defined by techniques and strategies that engage RDNs and other health professionals directly with the consumer to encourage positive behavior change. Consumers are seeking more individualized approaches to health and well-being — whether in the pharmacy department or in the produce aisles. Food retailers are tailoring offerings and services, in areas ranging from nutrition education resources to customer interactions.

HEALTH SCREENINGS

Aspects of health screenings include the following:

- Simple blood pressure check (either via machine in pharmacy or delivered by retail health professionals: nurse, RDN, Rx).
- Biometric screenings (total cholesterol, LDL-cholesterol, HDL-cholesterol, triglycerides)
- Blood glucose/hemoglobin A1c
- Weight/BMI/body fat percentage



EXAMPLES OF PROGRAMS

- ▶ Nutrition-focused articles or blogs
- ▶ In-person or virtual health and nutrition classes
- ▶ In-person or virtual store tours
- ▶ Health screenings
- ▶ Home food safety education programs
- ▶ One-on-one counseling
- ▶ Employee wellness programs
- ▶ Medical nutrition therapy delivered by an RDN in-person or through telenutrition
- ▶ Certified diabetes education program
- ▶ Diabetes prevention program

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

37%

of responding consumers said one or more stores they regularly shop offer health screenings

64%

of those whose stores offer it have participated or used it

62%

of all respondents find this type of program somewhat or very appealing

KEY TARGET SHOPPERS

Food retailers can serve a range of target customers with Food as Medicine consumer-centric strategies. Here are focus areas and some target customers for each area.¹

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

ENTERING THE “ZONE OF INNOVATION”

A digital ethnography study of consumers found that now is the time for food retailers to introduce Food as Medicine programs, promotions and services to market.

The concept of Food as Medicine is predicted to move into the zone of innovation, when consumer demand reaches 33% to 55% on a maturity curve, representing a key time to launch a solution and get ahead of the competition.

Prioritizing opportunities that fall within the zone of innovation provides food retailers the lead time needed to bring something powerful to market in a timely manner.⁷

Digital Ethnography Research:

The research was performed by MotivBase, using an “AI Anthropologist.” It decodes and quantifies the meanings around important topics by examining and analyzing the natural and organic conversations conducted by millions of global consumers via the internet. The resulting information enables a team of PhD researchers to identify and quantify “microcultures” — or areas of demand — for businesses.⁷

FIVE OPPORTUNITIES

The research identified five key microcultures or themes for Food as Medicine — specifically linking foods to improved health. These are based on the conversations consumers are having that were picked up by the digital ethnography report. The microcultures are gut health; nutritional deficiencies; inflammation, intolerance and allergies; diabetes and heart disease; and foodborne illness. Food retailers are in a position to make progress now with each of these growth opportunities, according to the report and related webinar. Each microculture was given a current maturity growth score by MotivBase. Through prediction capabilities, the current maturity curve scores shown for the identified microcultures are moving from an early consensus stage to the early majority stage for more broad mainstream acceptance.

Here are details on each of the five microcultures, based on findings from the digital ethnography research.⁷

1 Gut Health: Consumers see probiotic-rich foods as useful for boosting good bacteria to heal their gut.

Driving growth is consumer interest in food rich in probiotics and fermented food to improve overall wellness. Consumers also link high fiber foods to improved digestion.

CURRENT MATURITY
CURVE SCORE
32.8%

SIZE OF INTERESTED
CONSUMER BASE
60.6M

**2 Nutritional
Deficiencies:**

Consumers concerned about nutritional deficiency believe high-quality foods — such as fruits, vegetables and lean proteins — can help with nutritional deficiencies more effectively than supplements.

CURRENT MATURITY
CURVE SCORE
32.4%

SIZE OF INTERESTED
CONSUMER BASE
59.5M

**3 Inflammation,
Intolerance & Allergies:**

Consumers want anti-inflammatory foods to safely combat inflammation and symptoms of food intolerances, mild allergies and skin conditions. Consumers are sharing articles about how to differentiate food allergies from intolerances, as well as the benefits of anti-inflammatory foods such as fish, Greek yogurt and fruits and vegetables.

CURRENT MATURITY
CURVE SCORE
29.1%

SIZE OF INTERESTED
CONSUMER BASE
53.3M

**4 Diabetes & Heart
Disease:** Consumers

believe the right kinds of fats, fiber and sweeteners can help regulate blood sugar and heart health. They are reading about foods to help manage blood sugar levels, such as beans, peas and lentils. They seek smarter ways to enjoy sweets but worry that artificial sweeteners may be unsafe in the long run. For heart health, they read about replacing saturated fats with plant-based oils such as olive, walnut and canola oil.

CURRENT MATURITY
CURVE SCORE
29.7%

SIZE OF INTERESTED
CONSUMER BASE
54.6M

5 Foodborne Illness:

Consumers believe precautions are needed to ensure food safety and security. They are citing food safety and avoiding foodborne illnesses as important parts of food and water security. Consumers are discussing preventive measures such as thoroughly washing vegetables, properly handling and cooking meat, and safely storing and monitoring food items for expiration.

CURRENT MATURITY
CURVE SCORE
29.2%

SIZE OF INTERESTED
CONSUMER BASE
54.1M

The five identified microcultures are consumer-centric opportunities for food retail leaders to leverage the knowledge and experience of the RDN to connect the science of food and nutrition to guide continued consumer conversations. Focusing on the Food as Medicine opportunities predicted to move into the zone of innovation ensures that the runway needed to bring something powerful into market in a timely manner has also been established.⁷

DO'S AND DON'TS TO BOOST CREDIBILITY

Food as Medicine efforts will only succeed if they are executed and communicated in credible ways. Following is feedback from a cross-section of RDNs who operate in retail food environments. These RDNs shared ideas about how to make Food as Medicine initiatives successful.

- ▶ **Communicate that Food as Medicine is science-based.**
- ▶ **Put the emphasis on prevention.**
- ▶ **Don't imply that food will replace medication or "treat" disease in quite the same way as prescribed medication and treatment.**
- ▶ **Don't imply that Food as Medicine is only for the sick.**
- ▶ **Emphasize that other strategies can also help with disease prevention — such as exercise, sleep and stress reduction.**
- ▶ **Consider how to convert consumer interest into follow-through.**
- ▶ **Improve access to healthy foods so everyone can benefit.**



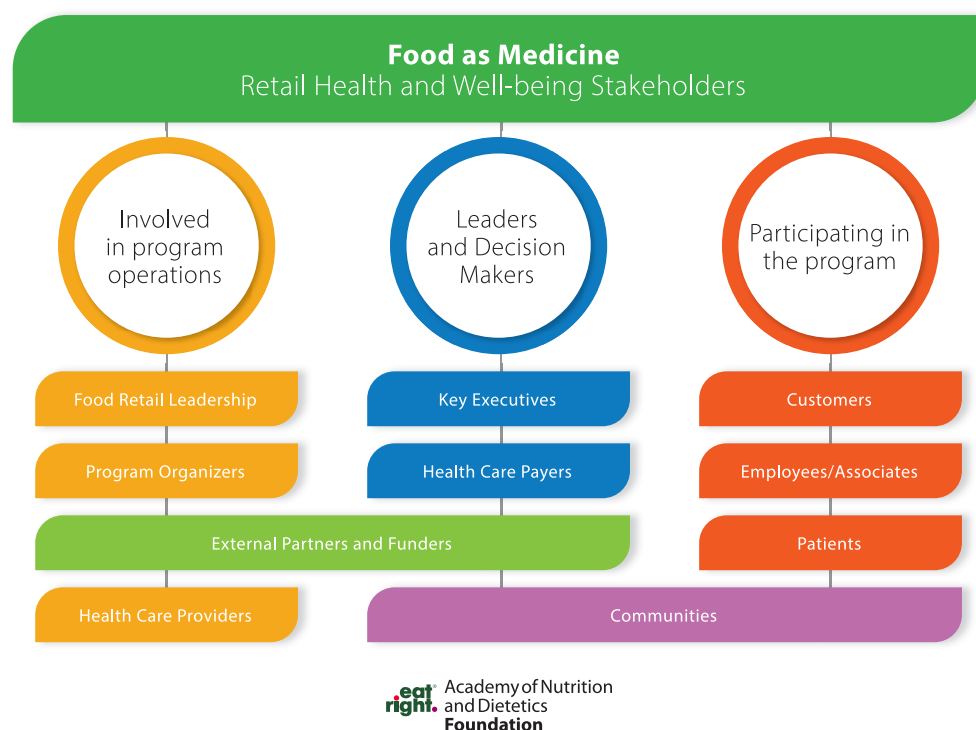
4

MEASUREMENTS AND NEXT STEPS

SUCCESS INVOLVES MANY STAKEHOLDERS

Few programs at retail succeed without the involvement of multiple stakeholders from across the organization. While retailers are encouraged to engage RDNs as leaders in Food as Medicine programs, many other internal and external stakeholders need to be involved as well.

These include the following, according to the evaluation guide⁸ from The Academy of Nutrition and Dietetics Foundation:



1 Individuals in Program Operations:

These may include food retail leadership, program staff, merchants, buyers, private brand decision makers, external partners and funders.

2 Leaders and Decision Makers:

These may include internal decision makers within the organization, health care payers, external partners and program funders.

3 Participants in the Program:

These may include customers, health and well-being patients and food retail employees.

IMPORTANCE OF EVALUATING EFFORTS

As mentioned earlier, food retailers have an opportunity to further enhance Food as Medicine success by operating multi-component program models and by collecting and reporting metrics to their stakeholders — such as ROI and health outcomes.

The evaluation guide⁸ from the Academy of Nutrition and Dietetics Foundation (available November 2021) includes a comprehensive evaluation framework and standards — along with case studies.

In addition, it includes details on aspects such as selecting data collection methods and analyzing metrics. It also relays guidance on reporting findings and sharing lessons learned.

NEXT STEPS TO MAKE PROGRESS

Food retailers considering their next steps in designing successful Food as Medicine programs should take the opportunity to ask key questions to dig deeper as a part of a self-assessment process. The following key questions are derived from the *Food as Medicine Retail Nutrition Landscape* white paper from the Academy of Nutrition and Dietetics Foundation.¹

KEY QUESTIONS

1. How can I place even more focus on product selection, meal solutions and health and well-being services to make healthy choices convenient to consumers?
2. How can I deliver personalized nutrition services and wellness products for consumers?
3. How can I best leverage the expertise of registered dietitian nutritionists to help ensure that my retail organization is a trusted source of information for shoppers?
4. What are the best ways to effectively communicate efforts to customers and internally across my retail organization?
5. How can I effectively evaluate initiatives to determine what is working, what needs to be improved and what is not a viable program option?



LIST OF RESOURCES FOR MORE INFORMATION

¹ Academy of Nutrition and Dietetics Foundation, *Food as Medicine Retail Nutrition Landscape*; Yoder A, Borra S., Brown N.; 2021; eatrightfoundation.org/foodasmedicine/#paper

² FMI, *The Power of Health and Well-Being in the Food Industry*, 2021

³ FMI, *U.S. Grocery Shopper Trends*, 2021

⁴ FMI, *U.S. Grocery Shopper Trends COVID-19 Tracker*, August 2021

⁵ FMI, *The Food Retailing Industry Speaks*, 2021

⁶ FMI, *Report on Retailer Contributions to Health and Well-Being*, 2021

⁷ The Center for Food Integrity. MotivBase, *Food as Medicine digital ethnography analysis*, 2021

⁸ Academy of Nutrition and Dietetics Foundation, *Food as Medicine in the Retail Setting: A Comprehensive Guide to Program Evaluation*; Yoder, A., Verdi, C., and Register, K; November 2021

⁹ Academy of Nutrition and Dietetics, *Retail Nutrition Programs and Outcomes: An Evidence Analysis Center Scoping Review*; Yoder AD, Proaño GV, Handu D.; Published online November 2020; doi:10.1016/j.jand.2020.08.080

¹⁰ Academy of Nutrition and Dietetics Foundation, *Food as Medicine Resource Page*
www.eatrightfoundation.org/foodasmedicine

¹¹ FMI, *Board Policy on Food as Medicine*, March 1, 2021
<https://www.fmi.org/blog/view/policy-statements/2021/03/01/food-as-medicine>