



# Numerator

NEW FRONTIERS

Health and Wellness in the Time of COVID

# More than ever, health is top of mind for consumers

DIET & NUTRITION

## The Top 10 Healthy Food Trends to Expect in 2021

Registered dietitians project that keto, paleo, plant-based, and gluten-free fare will remain trendy in 2021.

### The 5 Hottest Diets of 2021

- Lose The Booze for A Month.
- Restricting Calories, **Eating Certain Foods** (Two Phases)
- Low Calorie, Nutrient-Dense **Foods**.
- **Dietary** Approaches to Stop Hypertension.
- Mediterranean-DASH Intervention for Neurodegenerative Delay.

Dec 15, 2020

[www.mollysims.com](http://www.mollysims.com) > [blog](#) > [2020/12/15](#) > [the-5-hottest-...](#)

[The 5 Hottest Diets of 2021 - Molly Sims](#)

BRIEF

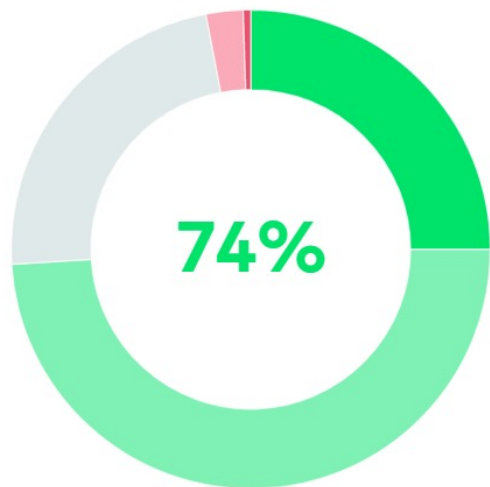
## Consumer concerns about COVID-19 put focus on better-for-you products

### 2. The Immune System Support Diet (“Eating to Combat Covid”)

**COVID continues to be one of the key influencers of every single trend, and dietary habits are no exception.** In fact, The World Health Organization has announced dietary guidelines during the COVID outbreak that stressed the “importance of a balanced diet to maintain a strong immune system,” and includes the recommendation to consume 4 servings of fruits and 5 servings of veggies every day.

“Super” foods in the immune-supporting space are everything high in Vitamin C (from grapefruits to broccoli) and Vitamin E (from nuts to avocados). Other on-trend foods for fighting COVID are elderberries, green tea (high in antioxidants), Vitamin D (from the sun or from food, like eggs) and garlic.

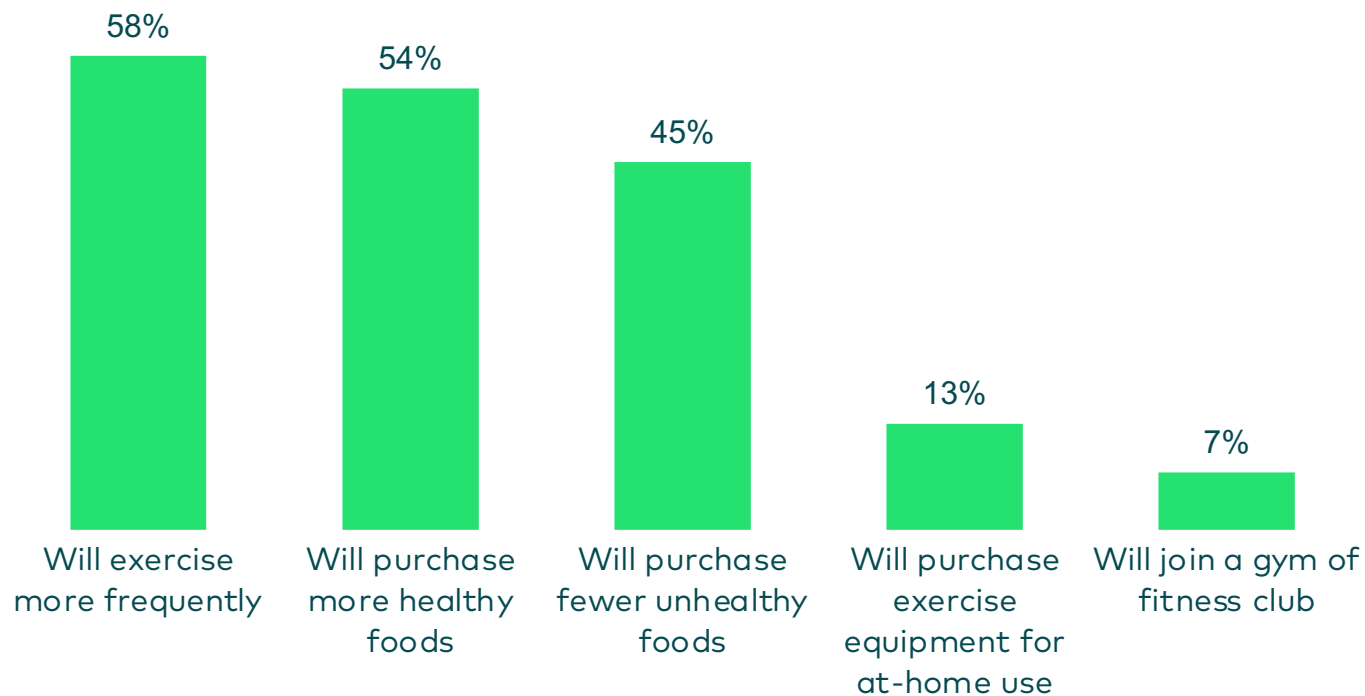
# 3 in 4 shoppers plan to lead a healthier lifestyle in 2021, whether it's staying active or eating healthier food



Strongly Agree  
Agree  
Neutral  
Disagree  
Strongly Disagree

**... Plan to lead a healthier lifestyle in 2021 than in 2020**

## Planned Health-related Lifestyle Adjustments in 2021



# When surveying health-conscious consumers ...



+22pts  
s YoY

## 71%

are practicing a diet



## 69%

of Dieting HHs

Have been practicing for  
less than year

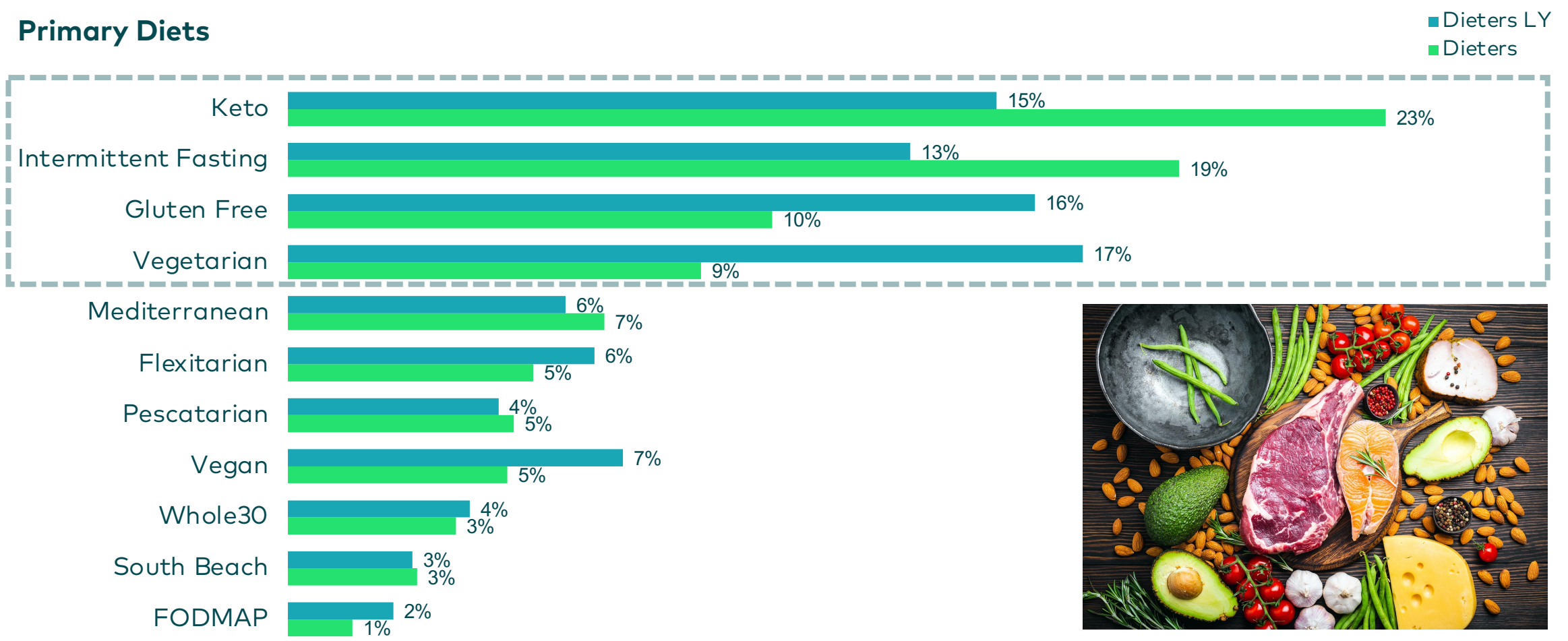


## 78%

of Dieting HHs

Plan to continue the  
diet in 6 months

# Keto and IF are more popular this year, while Gluten Free and Vegetarian diets are falling out of favor



Numerator Instant Survey, February 2021 vs February 2020, Dieters n=743, Dieters LY n =501  
Dieters = Health-conscious consumers who claimed to be dieters in February 2021 survey  
Dieters LY = Health-conscious consumers who claimed to be dieters in February 2020 survey

# Compared to dieters last year, the group this year is more likely to contain low income, AfAm, and Gen Z/Boomer HHs

Although majority of dieters are still Millennials, there is an opportunity to engage with other age groups

## Indexed to Dieters LY



### AGE

#### Gen Z/ Boomer

HHs: 6%, Index: 476  
HHs: 33%; Index: 133



### INCOME

#### Under \$60k

HHs: 46%, Index: 167



### ETHNICITY

#### Black/AfAm

HHs: 17%, Index: 290



### MARITAL STATUS

#### Living with Partner

HHs: 7%, Index: 310



### HOUSEHOLD SIZE

#### 5-6 People

HHs: 18%, Index: 151



### EDUCATION

#### Some Graduate School

HHs: 4%, Index: 377



### GENDER (APP OWNER)

#### Male

HHs: 28%, Index: 148



### URBANICITY

#### Rural

HHs: 31%, Index: 122



### EMPLOYMENT

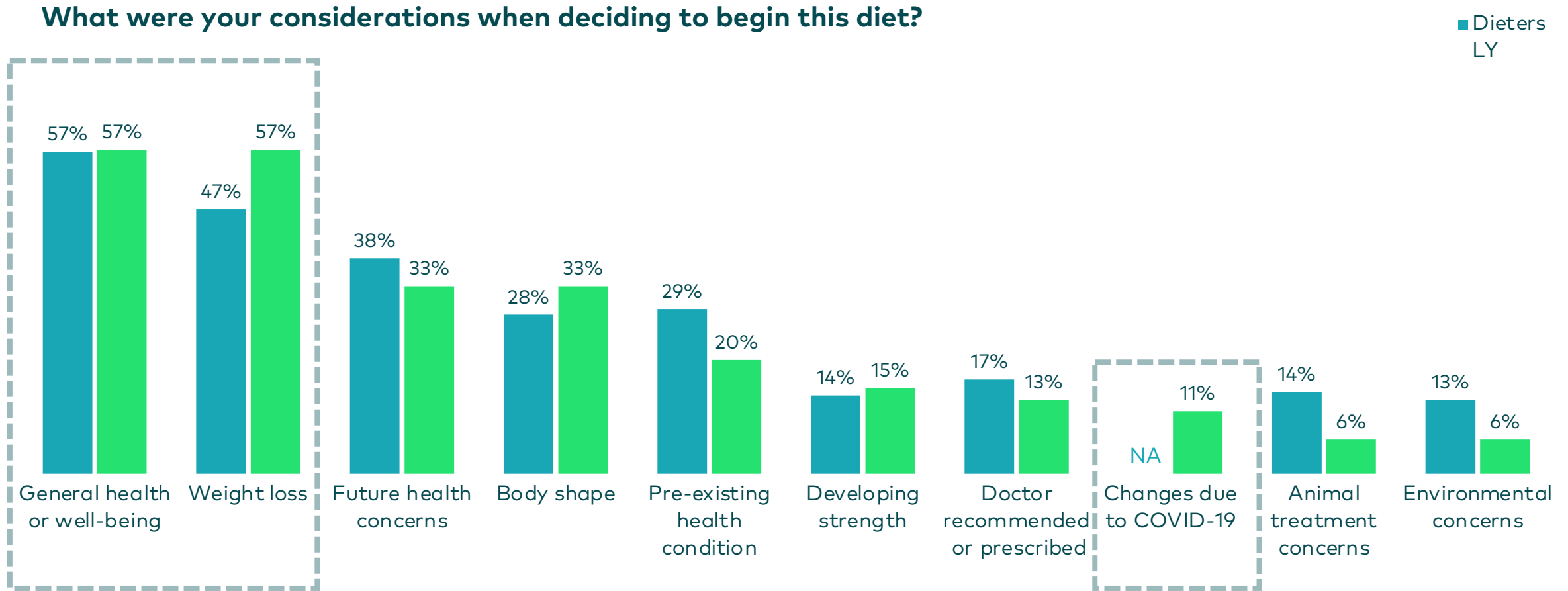
#### Retired

HHs: 16%, Index: 402

Numerator Insights, Shopper Profile, L12M ending 1/31/2020, Dieters n=862, Dieters LY n=306  
Dieters = Health-conscious consumers who claimed to be dieters in February 2021 survey  
Dieters LY = Health-conscious consumers who claimed to be dieters in February 2020 survey

# Though COVID spurred some dieters, most are focused on managing well-being and weight loss

What were your considerations when deciding to begin this diet?



Numerator Survey, February 2021, Dieters n=743, Dieters LY n=501  
Dieters = Health-conscious consumers who claimed to be dieters in February 2021 survey  
Dieters LY = Health-conscious consumers who claimed to be dieters in February 2020 survey

1 in 2 dieters are committed to staying active with walking, weight-lifting, yoga or cycling being the top choices

50%

of Dieters exercise  
2-4x a week



Exercise choices are ones that can be done alone, in small groups social distanced, or via online classes





Where are dieters buying their groceries?

Due to COVID-19, all shoppers are spending more on groceries, however dieters still spend more than an avg. HH

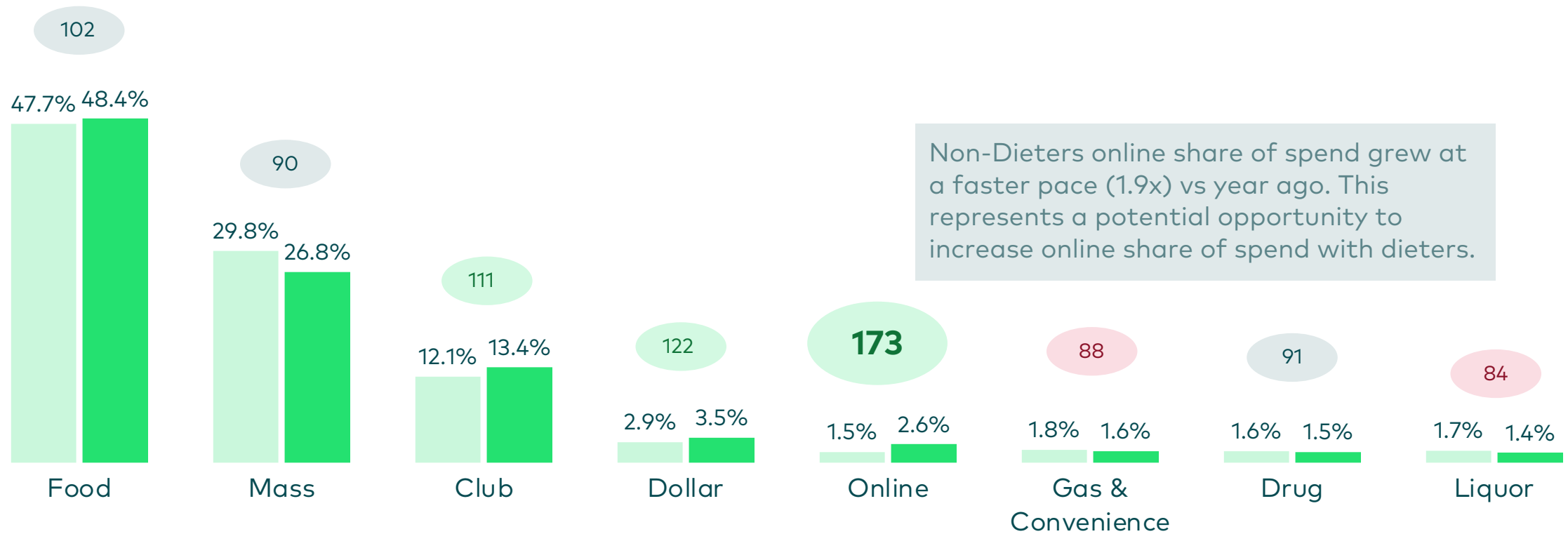
	 <b>Purchase Frequency</b> (Grocery Trips per year)	 <b>Annual Spend Per HH on Groceries</b>
<b>Dieters</b>	<b>257</b>	<b>\$6,788</b> <span>+3% YoY</span>
<b>All Shoppers</b>	<b>218</b>	<b>\$6,079</b> <span>+22% YoY</span>

# Dieters are still purchasing majority of their groceries in Food, Mass and Club

## 2021 Dieter: Share of Grocery Spend

L12M vs YAG

■ YAG  
■ Dieters



Non-Dieters online share of spend grew at a faster pace (1.9x) vs year ago. This represents a potential opportunity to increase online share of spend with dieters.

Numerator Insights, Bricks N Clicks, L12M ending 1/31/2021, Dieters n=874  
 Dieters = Health-conscious consumers who claimed to be dieters in February 2021 survey  
 YAG= 2021 dieters' behavior in 2020

Kroger focused on promoting more of their private label brand vs competitors, capturing a larger share of voice for the categories below

**45%**  
of all promos for  
**Dried Fruit Snacks**



**24%**  
of all promos for  
**Granola**



**19%**  
of all promos for  
**Milk Alternatives**



**18%**  
of all promos for  
**Nutritional Snacks**



**14%**  
of all promos for  
**Pretzels**



**11%**  
of all promos for  
**Sports Nutrition**



...were for Kroger Private Brand products

# Top 5 retailers where dieters say they purchase groceries for their specialty diets...



...but what about online growth?

# Dieters took advantage of the convenience of online, as increasingly more HHs overall utilize the channel for groceries

## Grocery Purchases at Online Retailers

L12M vs YAG

**amazon.com**

**Walmart** 

Projected HHs    YoY Growth

Projected HHs    YoY Growth

Dieters    **544k**    **+89%**

**162k**    **+175%**

All Grocery Shoppers    **59M**    **+31%**

**21M**    **+106%**

Whether consumers are dieting or not,  
**42% of shoppers**  
improved their health-related behaviors  
since the onset of COVID-19 pandemic

# Shoppers are eating well and spending more on fruits and vegetables



Fresh Fruit

**+13%**



Fresh Vegetables

**+17%**



Frozen Fruit

**+25%**



Frozen Vegetables

**+18%**

*Annual Sales  
2020 vs. 2019*

*YTD Sales  
2021 vs. 2020*

**+11%**

**+13%**

**+11%**

**+10%**



# Committing to a health lifestyle, they are experimenting with meat alternatives, vitamins, and activity trackers



Fresh Poultry

**+18%**

*Annual Sales  
2020 vs. 2019*

**+9%**

*YTD Sales  
2021 vs. 2020*



Meat Alternatives

**+61%**

**+21%**



Vitamins & Supplements

**+24%**

**+23%**



Activity Trackers  
& Smartwatches

**+5%**

**+5%**

# Online became the #1 channel to purchase Vitamins & Supplements in 2020, stealing dollars from all major channels

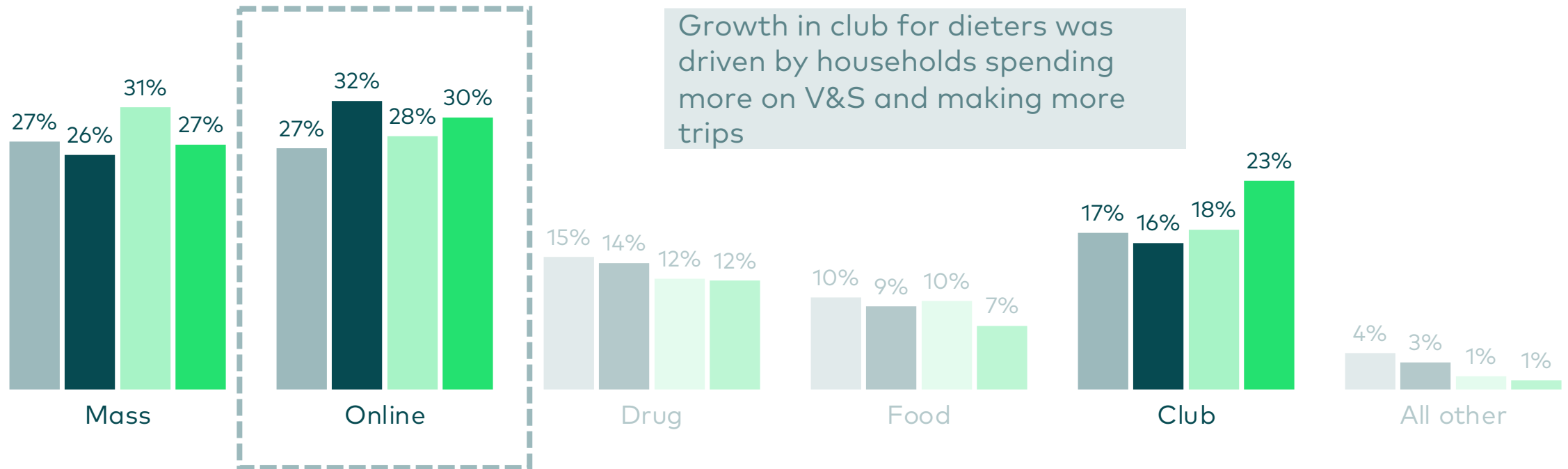
Club has won the heart of dieters, more than your average shopper, possibly for assortment or additional value to support their lifestyle

## Share of Projected Sales by Channel

Vitamins & Supplements



- All Shoppers, YAG
- All Shoppers, L12M
- Dieters, YAG
- Dieters, L12M



# Not only are dieters outpacing all shoppers in vitamins and supplements, but they also have significant growth YoY

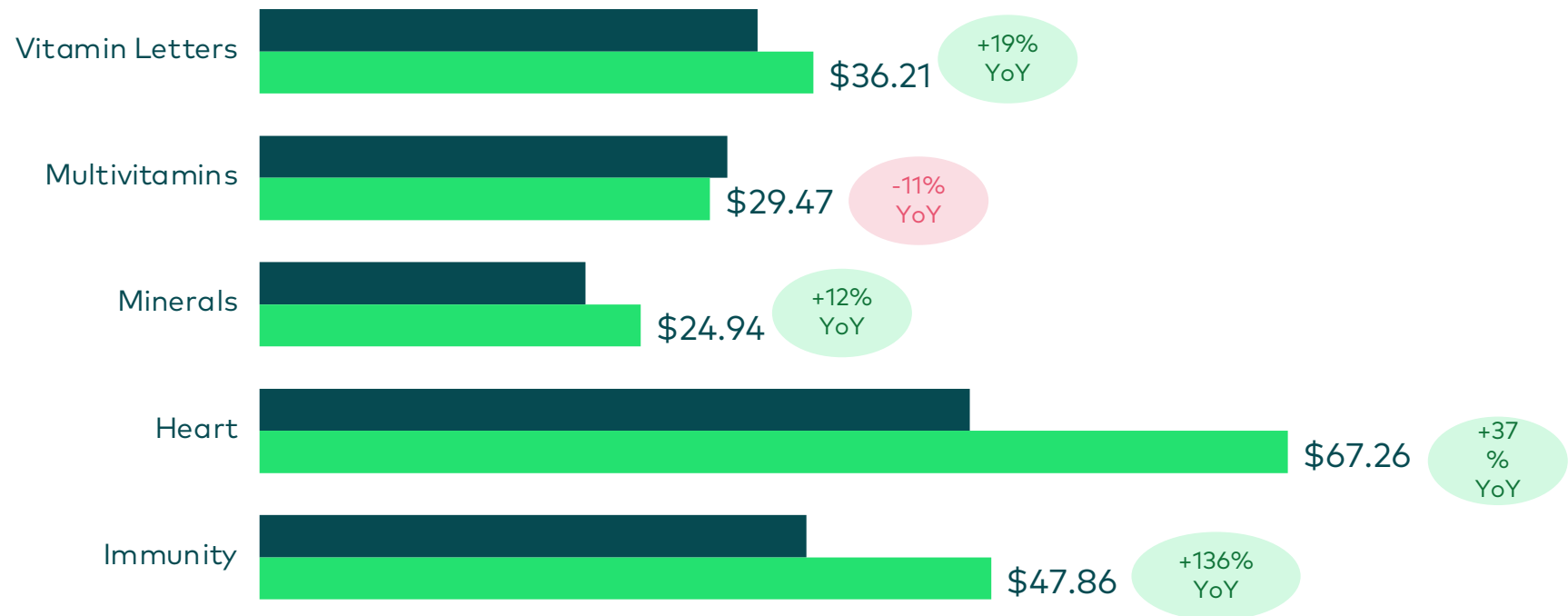
Dieters' Buy Rate growth in vitamins is coming from existing shoppers spending more on various types of vitamins

## Vitamins & Supplements Major Category: All Channels

Buy Rate

■ All Shoppers

■ Dieters



Numerator Insights, Data Explorer, L12M ending 1/31/2021, Dieters n=860, All Shoppers n=97,535

Dieters = Health-conscious consumers who claimed to be dieters in February 2021 survey

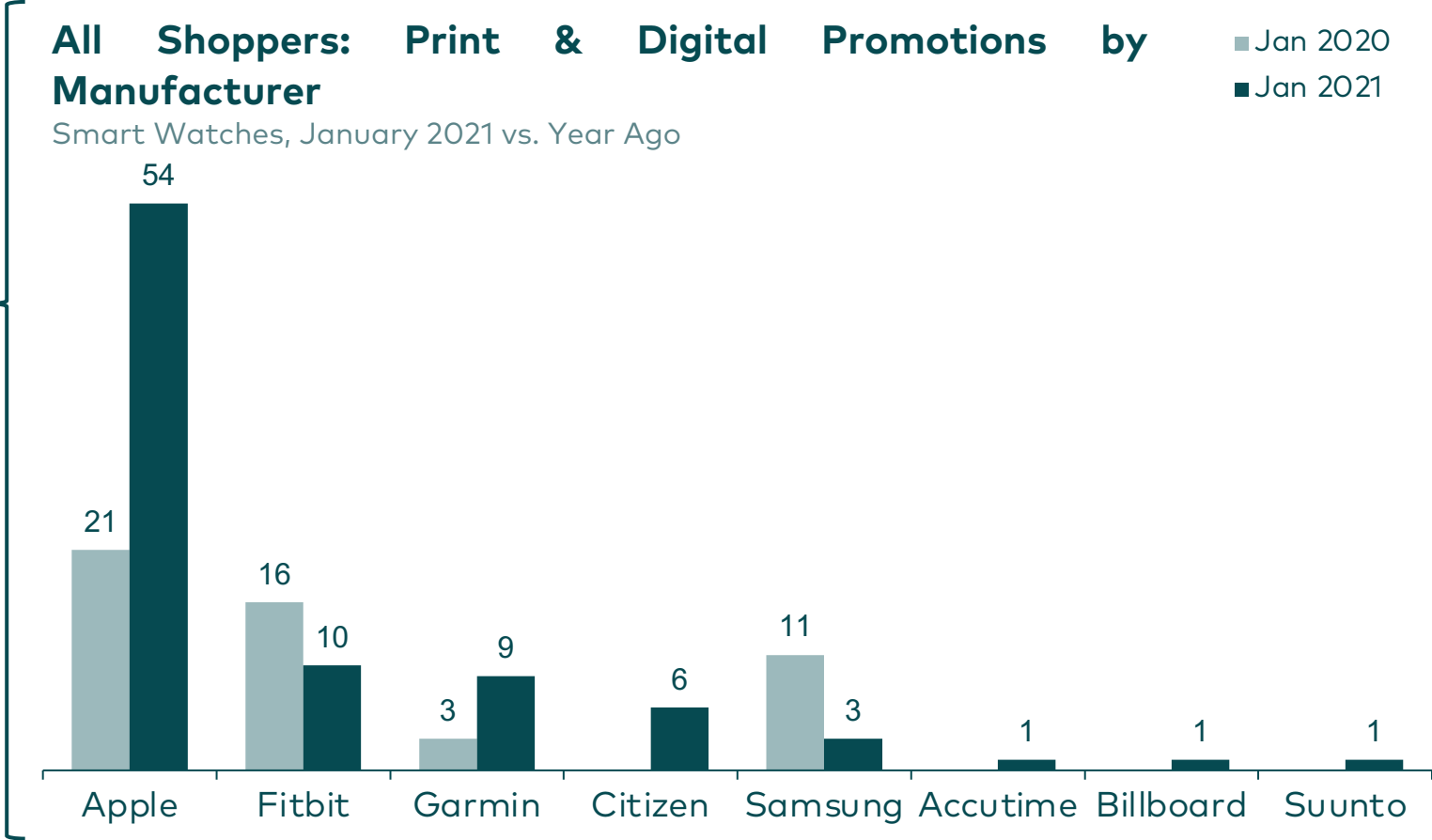
% Change YoY = Dieters' buy rate vs YAG

# Manufacturers are taking advantage of the increased focus on health by promoting their activity trackers



# +67%

Increase in Smart Watch Promotions

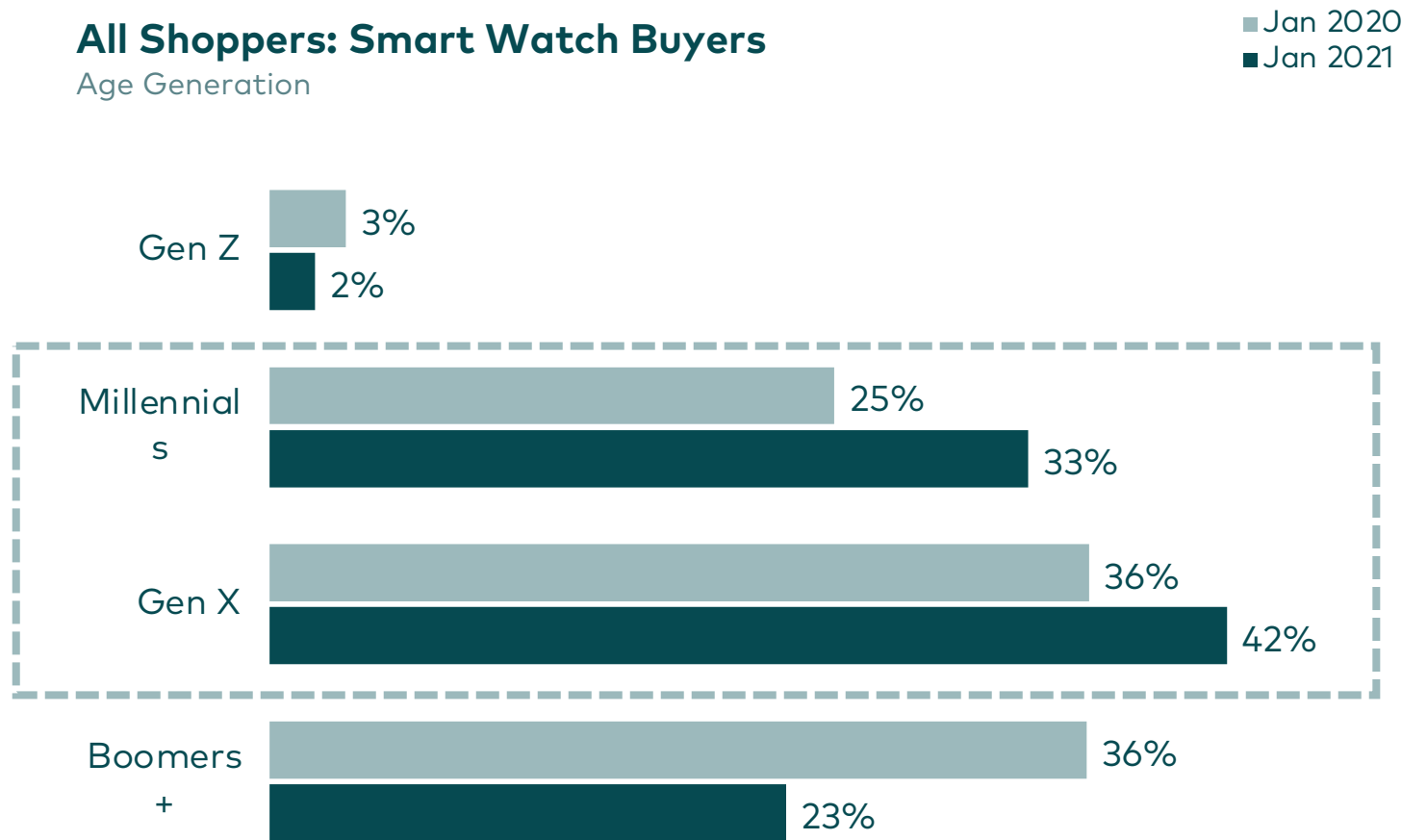


# Promotional activity for Smartwatches appears to have resonated among younger shoppers compared to last year



**+5%**

Projected Sales  
2021 vs. 2020



## What we're seeing

Shoppers plan to continue living a healthy lifestyle in 2021 by staying active and eating well

Due to COVID-19, shoppers are spending more on groceries overall, however Dieters still spend more than an average household

Not only are shoppers spending more on healthier food options, they are also purchasing more vitamins and activity trackers

## Why it matters to you

3 in 4 Dieters plan to continue their diet 6 months from now and shoppers in general are looking to improve their health-related behaviors

Develop a strong omnichannel strategy as dieters spend their health category dollars in various channels

## How you can take action

Contact your Numerator consultant to discuss applications

**RETAILERS:** Ensure frictionless online experience to capture online shoppers, and consider key placements in circulars of health-related items

**BRANDS:** Stay up to date on health and diet trends, and have offerings appealing to both the dieter and non-dieter



# Numerator

NEW FRONTIERS

Get the omnichannel insights you need for your next  
new item launch.

[hello@numerator.com](mailto:hello@numerator.com)