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# Me, My Health And I

FOOD AND BEVERAGE CHAPTER

MARS

April 21, 2022



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THE TEAM BEHIND THE REPORT

# How have our wellness priorities changed?



**Yui Okada**



**Sofie Holt**



**Ed Westberg**

**PRE-pandemic**

Physical **fitness** & **protein-rich** diet

**No** health concern

**Global outlook** on health

**Pandemic**

Boost immunity **by eating well**

**Holistic health** (especially **mental**)

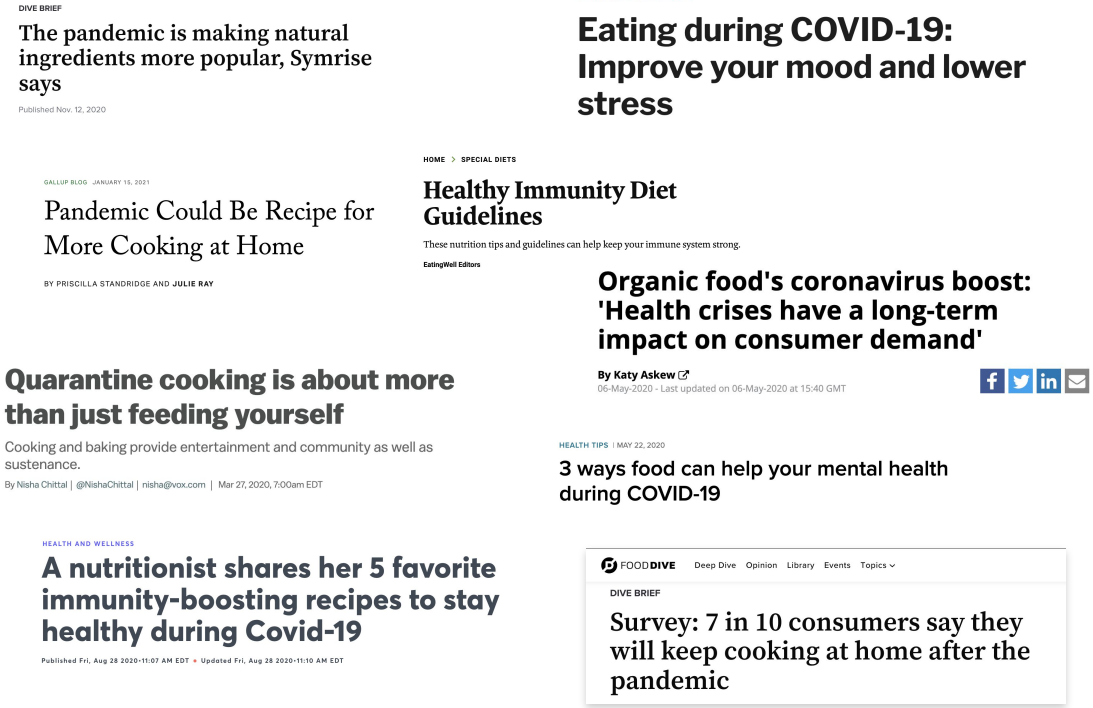
Priority on **family health**

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# Covid-19's increased spotlight on health and wellness is shifting what we eat and drink, and **healthy eating** is a top priority

**Q: What is your biggest priority for health and wellbeing?**

1. Mental health
2. **Healthy eating**
3. Immunity & Vaccination




**Source:** Google & C-space Qualitative survey (Oct 2021); UK, US, IN, DE.

# People are turning to Google platforms for information and inspiration through all stages of their healthy food and drink explorations

## Why we eat

Google




YouTube



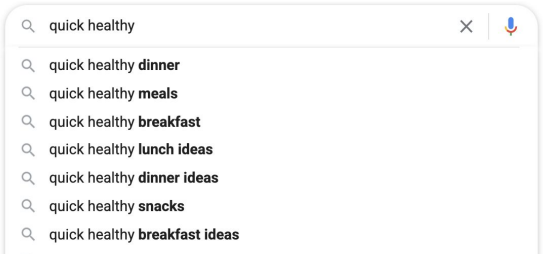

## What we eat

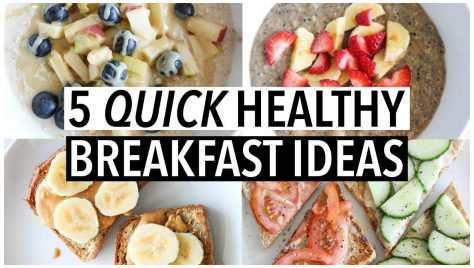
Google

is ___ healthy for ___?

search volume reached an **all-time high** in 2021 as consumers do more **health-driven food research**

## How we eat



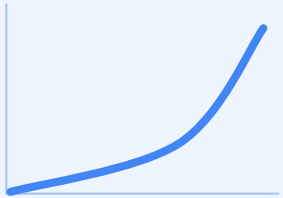

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Source: Google Search data (2021); YouTube.com

# To understand accelerated and emerging health and wellness behaviors, we turned to Google data

**ACCELERATING**

Trends that were already happening, but **accelerated** since Covid-19



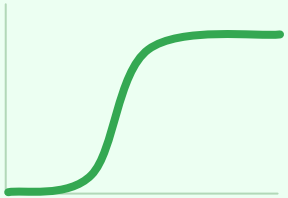
**Food is fuel**

Food to help [ ___ ]

[ ___ ] nutritional value

**EMERGING**

Trends that were *not* happening, but are **emerging** since Covid-19



**Immunity boosting**

Immunity booster food

Teas to boost immunity



**Source:** Google Search data (2020-21); UK, US & IN

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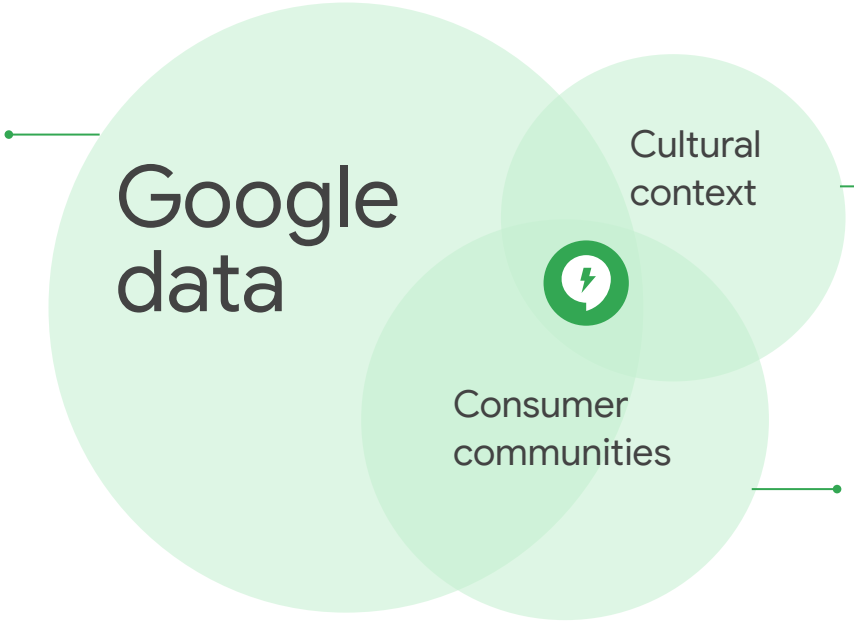
# Using our unique methodology, we see evolutions in what people are looking for when making healthier food & drink choices

## Google Search data

Google queries in health category from 2019 to 2021 to understand recent growth

## YouTube data

Examples of recent trends on YouTube identified through Machine Learning




## Cultural, psychological and industry trends

**200+** articles

## Qualitative communities

Talked to **380+** health conscious consumers on **3 activities** and **4** in-depth interviews across **4** markets

OUR FOCUS REGIONS (qual only)

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# Behavior Deep-Dives

# Brands have an opportunity to reach people in their food & drink moments as they take control of their health



## 01

I make lifestyle choices to care for **my whole self**, not just my body

**KEY MOMENTS**

- I care for my **body**
- I care for my **mind**
- I care for my **planet**



## 02

I'm **empowered to make decisions**, not just gather information

**KEY MOMENTS**

- I decide through **learning**
- I decide through **cooking**
- I decide through **connecting**



## 03

I want **personalized options** I can do on my own terms

**KEY MOMENTS**

- I need food that **works for ME**
- I need food that **is convenient**
- I need food that **helps me balance**



# 01

I make lifestyle choices to care for **my whole self**, not just my body

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# People see the power of a **holistic** focus on mind, body, and planet and lean into proactive self-care

## 2019
### How it started
Prevention was centered around eating healthy for *physical* health

**Body**

- functional food
- ___ calories

## 2020
### Covid trigger
Eating healthy as part of boosting immunity; Accelerated focus on mental wellbeing since lockdown



## 2021
### How it's going
Perception of "healthy" is expanding – and *holistic* wellness is impacting all aspects of diet and nutrition for people's minds, bodies and planet

Moments: I care for my...

**Mind**

- **meditation**
- **sleep**
- **brain power**

**Body**

- **immunity-boosting** food & drink
- **nutrition** > calories
- **optimizing** through food & drink

**Planet**

- **locally sourced**
- **organic**
- **plant-based**

1 I care for

# my body

## I am more deliberately making food choices that serve my body's long-term nutritional needs

**2/3**

of us are interested in learning more about the role of food and nutrients in immune health

*'We try to eat more fruits and vegetables to **receive many vitamins and have a good immune system**.'*
-Maximilian S., 24, Millennial

ACCELERATING

**Optimizing ingredients**

"probiotic yogurt"
"gut health snacks"
"fermented ___"

→ **"I connect ingredients to their preventative benefits"**

ACCELERATING

**Nutrition, not calories**

"chocolate nutrition"
"quinoa nutrition"
"almond milk nutrition"

→ **"I choose my food for its holistic health value"**

EMERGING

**Immunity-boosting food & drink**

"immunity booster food"
"fruits rich in zinc"
"teas to boost immunity"

→ **"Immunity through food is part of my daily routine"**



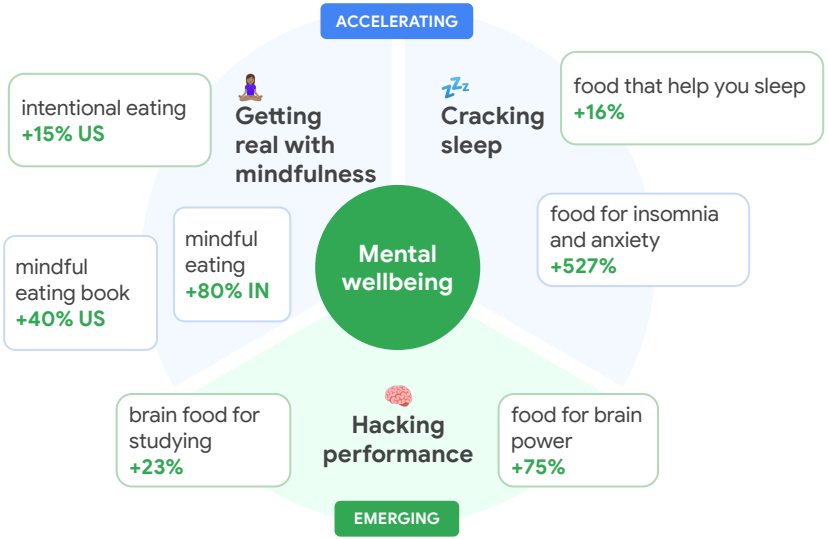
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Source: "Food & Health Survey" (2021); Google Search data (2020-21), UK, US & IN

2 I care for

# my mind

## I use food and drink as wellbeing boosters throughout my daily routines




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**Source:** Google Search data (2020-21), UK, US & IN

## Food is not just fuel, it's increasingly used as a tool for **proactive self care**

*"I think that eating a healthy balanced diet (...) is instrumental to a happy life. The two work in synergy. **I have found that I am happier, healthier, have more energy and sleep better by following this lifestyle**."*
**– Fran B., 40, Parent, United Kingdom**




**What I Eat In A Day (self-Care Routine) | Easy Vegan Recipes for Days When You're Sad**
55K+ views · Edgy Veg




**Why Diet Might Be a Big Deal for Mental Health**
103K+ views · SciShow Psych




**Best Foods for Anxiety and Depression**
265K+ views · Mind Over Munch

3 I care for

# our planet

## I eat and drink with a purpose that's bigger than just me

### Local

EMERGING

**96%**

of Americans see locally-produced food as more nutritious

*"I have shifted to buying foods prepared locally using local ingredients. This is to ensure the **freshness and sustainability of foods and also help support local communities**."*

-Kalyani N., Gen X, India

### Organic

ACCELERATING

**TOP SEARCHES BY COUNTRY**

Organic wine brands
Organic fruits delivery
Best organic tea brands
Organic baby food

Organic halal meat
Organic raspberry leaf tea
Organic tofu
Organic dark chocolate

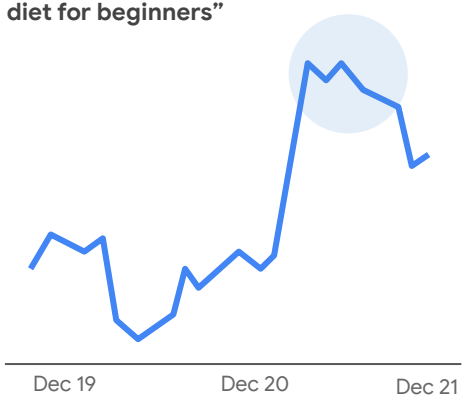
Organic vegetables
Organic turmeric powder
Organic brown sugar
Organic brown rice



### Plant-Based

ACCELERATING

**Searches for "plant based diet for beginners"**




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**Source:** Google Search data (2020-21), UK, US & IN; Rabobank (Oct 2021); Google / C Space qualitative survey, Dec 2021, US, UK, MX, BR, DE, FR, IN, n =598; Google / C Space qualitative survey, Aug 2021, US, UK, MX, BR, DE, FR, IN, n = 707; goforager.com (2021); foodbeverageinsider.com (2021)

# In caring for our planet, I'm open to experimenting with alternatives

US: TOP **PLANT / VEGAN BASED** SEARCHES BY CATEGORY

US: TOP **ORGANIC** SEARCHES BY CATEGORY

## packaged / frozen food

plant based **sausage**
plant based **eggs**
plant based **chicken nuggets**
plant based **burgers**
best plant based **burger**
plant based **burger** recipe
plant based **chicken wings**
plant based **chilli**
plant based **cookies**

I fulfill my cravings for indulgent food with eco-conscious options

## candy / snacks

vegan **chocolate**
vegan **marshmallow**
**sour patch kids** vegan
vegan **chocolate bars**
vegan **gummies**
vegan **graham crackers**
vegan **kit kat** Breakout

I want even small food choices to reflect my values and beliefs

## drinks

organic **tea**
organic **coffee**
[brand name] organic **seltzer** Breakout
[brand name] organic **milk**
organic **wine**
organic **apple cider vinegar**
[brand name] **organic whole milk**
organic **green tea**

From dairy to tea to coffee to seltzer, I look for the organic option



Source: Google Search data (2020-21); US

# How can Mars tap into people's healthy food choices?

## QUESTIONS TO GET YOU THINKING...

- What role does Mars products play in "wellness" and not just "health"? Do you have a role to play on immunity-boosting and prevention?
- How can wellbeing boosters play into your moments strategy?
- Do Mars products deliver multifaceted value for body, mind *and* planet - both human and pets? How do you tell the story of this intersect?



# 02

I'm **empowered to make decisions**, not just gather information

# People educate themselves on food to take decisive action for the health and wellness of themselves and their families

## 2019
### How it started
We started building our knowledge of select healthy ingredients

benefits of

benefits of **turmeric**

benefits of **ginger**

benefits of **chia seeds**

## 2020
### Covid trigger
Fear of Going Out (FOGO) leads to more cooking at home and increased interest in learning about healthy eating habits

## 2021
### How it's going
We're getting more targeted with our research on the health benefits of our food and drinks, and feel more confident taking action for not just ourselves, but also for our families

**I am empowered** to decide by

**Learning moment**
about health properties of ingredients and products

**Cooking moment**
with new health objectives in mind

**Connecting moment**
with my family and community as part of my routine

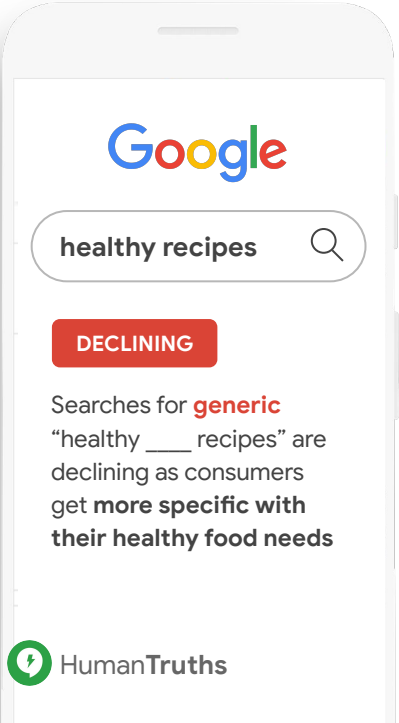
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**Source:** Google Search data (2019) US

1

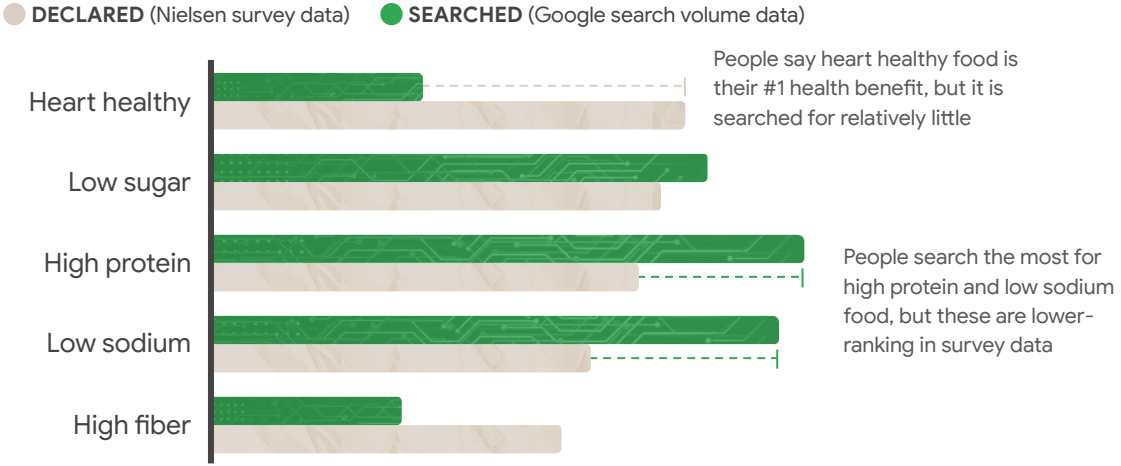
# I decide through learning

## I'm learning which ingredients and recipes help my *specific* health goals




ACCELERATING

**Searches for specific health-related food items are growing, and some are over-indexing in Search vs. survey data**




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**Source:** Google Search data (2021) US only, Nielsen IQ data (2021), "Food Insights, "2021 Food & Health Survey"

1 I decide through

# learning

I'm learning which ingredients and products help my pet's *health needs*




**"Hydrolyzed protein"** a growing topic!

| | | |
|---|---|---|
| 1 | hydrolyzed protein cat food | +250% |
| 2 | royal canin hydrolyzed protein canned dog food | +100% |
| 3 | what is hydrolyzed protein dog food | +50% |
| 4 | what is hydrolyzed protein | +50% |

*...also up for cat food 47% YoY*

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**Source:** Google Search data (2021) US only,

3 I decide through

# connecting

## Food decisions are influenced by how I connect with and care for others

### with family

People take seriously the responsibility they have for family members' nutrition – and get influenced back by them

**EMERGING**

over-index

**___ for elderly**
7 day meal plan for elderly
nutritional needs for elderly

**___ for teens**
healthy snack for teens
healthy diet for teens

**ACCELERATING**

**___ for kids**
healthy school lunch ideas
healthy food for picky eaters

**___ for infants**
vitamin rich foods for babies
healthy fruits for babies

*"**My daughter (13 yo) has a huge influence on healthy food choices.** ... I feel that she has so much more knowledge regarding what is healthy vs what is not."*
**–Melissa P., US, Millennial**

### with community

Cooking videos are booming as people get inspired by healthy food creators

YouTube

cook with me +24%




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**Source:** Google Search data (2020-21); US,UK & IN; YouTube search data (2019-2021), US; Google / C Space qualitative survey, Sep 2021, US, UK & IN,

# As I learn about alternative options, I make smarter food choices

## US: TOP **LOW SODIUM** SEARCHES

packaged food & snacks

low sodium **snacks**
low sodium **fast food**
low sodium **soup**
low sodium **hot dogs**
low sodium **breakfast**
low sodium **pickles**
low sodium **pizza**
low sodium **cottage cheese**
low sodium **chips**

I learn about and choose low sodium alternatives for processed food cravings

## US: TOP **LOW SUGAR** SEARCHES

packaged food & snacks

low sugar **snacks**
low sugar **protein bars**
low sugar **granola**
low sugar **cereal**
low sugar **cookies**
low sugar **candy**
low sugar **oatmeal**
low sugar **peanut butter**
low sugar **juice**

I look out for my sugar intake in breakfast products and choose low sugar snack options

## US: TOP **HIGH PROTEIN** SEARCHES

packaged food & snacks

high protein **snacks**
high protein **breakfast**
high protein low carb **foods**
high protein low fat **foods**
low calorie high protein **foods**
high protein **cereal**
high protein **fast food**
high protein **breakfast ideas**
high protein **yogurt**

I replace breakfast and snacks with high protein options; I combine high protein with low carb / low fat / low calorie



**Source:** Google Search data (2020-21); US

# How can Mars tap into people's decision making on foods?

## QUESTIONS TO GET YOU THINKING...

- Is Mars digital presence a resource for consumers who navigate nutritional education in an online space?
- How can Mars products empower consumers to take actions on health goals via recipe content?



# 03

I want **personalized options** I can use on my own terms

# Food and drink options need fit people's multifaceted needs

2019

## How it started

Demand for personalized products started trickling down to food & drink products

**Top trending searches on "personalized ___" in 2019**

personalized meal plan
+90%

personalized shampoo
+180%

personalized vitamins
+250%

2020

## Covid trigger

Increased importance of hyper-personalized nutrition as people got mass-educated on health and wellbeing

2021

## How it's going

People are expecting brands to meet their needs for food and drink options that work for unique needs, lifestyles, and holistic perception of health

Moments: I expect
**food and drink products that**

- Work for me — **[food and drink]** for __
- + Are healthy & convenient — **"fast"** and **"near me"**
- Help me balance — **"intuitive eating"**

1 I need options that

# work for ME

## I want food and drinks that are functional and personal to my unique needs

EMERGING

### Work for WHAT I deal with (functional searches)



Digestive health

- What foods neutralize **stomach acid** +196%
- Foods to avoid when **constipated** +74%
- [FBR products] for upset **stomach** +44%
- [FBR products] for **acid reflux** +40%
- Foods that heal **colon inflammation** +660%
- Foods that help with **heartburn** +59%



Lifestyle

- [FBR products] for **cholesterol** +151%
- [FBR products] for **energy** +24%
- [FBR products] for **your heart** +34%
- What foods to avoid with **diabetes** +88%
- Foods to avoid with high **cholesterol** +42%



Other needs

- [FBR products] for **sore throat** +45%
- [FBR products] for **nausea** +70%
- Foods that help with **period cramps** +133%

ACCELERATING

### Work for WHO I am or care for (personal searches)

[FBR items] for ...

- ___ **for diabetics** +58%
- ___ for adults +137%
- ___ for girls +287%
- ___ for women +44%
- ___ for men +17%
- ___ for boys +36%

*"I am **diabetic (...) I use the internet to search for food tips and diet ideas**. I also use YouTube video to gather information about my health and what other people are using that works or them."*

**–Charles O., 36, Millennial, US**

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**Source:** Google search data (2020-2021), US, UK, IN; Google / C Space qualitative survey, Sep 2021, US, UK, DE, IN,

1 I need options that

# work for my PET

I want foods that are functional and personal to my pets' unique needs

TOP SEARCH

**Work for what my dog needs**

[dog food] for ...

| | |
|---|---|
| ___ for hypoallergenic | +14% |
| ___ for allergies | +14% |
| ___ for sensitive stomach | +65% |

TOP SEARCH

**Work for what my cat needs**

[cat food] for ...

| | |
|---|---|
| ___ for indoors | +10% |
| ___ for sensitive stomach | +58% |
| ___ for urinary health | +93% |



**Source:** Google search data (2020-2021), US, UK, IN;

3 I need options that

# help me balance

I believe health and indulgence can co-exist with balanced choices

| EARLY PANDEMIC | MID PANDEMIC | TODAY |
|---|---|---|

Healthy

Dealing with the initial shock and anxiety from covid-19, comfort food became our... well... comfort



Healthy food scale

Indulgent



Realizing the longevity of the pandemic, we started making health*ier* choices

**TRENDING SEARCHES FOR BALANCED FOOD**

| | |
|---|---|
| bacon in air fryer | +72% |
| low calorie snacks | +38% |
| healthy alternative to doritos | +19% |
| healthy comfort food | +32% |

**"Healthy" is not just calories** – we look for *balanced* choices that give us holistic wellbeing across body AND mind





EMERGING

"intuitive eating" searches (US)

+3X

Jan 2022

Jan 2020

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**Source:** Google search data (2020-2021), US, UK, IN; Google / C Space qualitative survey, Sep 2021, US, UK, DE, IN,

# I look for food options which could work for my unique needs

US: TOP [FBR product] **FOR ___** SEARCHES BY CATEGORY

| snacks for ___ | drinks for ___ | breakfast for ___ |
|---|---|---|
| snacks **for diabetics** | what to drink **for acid reflux** | breakfast **for diabetics** |
| **healthy** snacks **for pregnancy** | what is the best drink **for high blood pressure** | best breakfast **for weight loss** |
| snacks **for breastfeeding** | drinks **for cancer patient** | **high protein** breakfast **for weight loss** |
| snacks **for ulcerative colitis** | caffeine drinks **for pregnancy** | **healthy** breakfast **for kids** |
| **healthy** snacks **for 1 year old** | the best wine to drink **for health** | **healthy** breakfast **for weight loss** |
| snacks **for high cholesterol** | nutritional drinks **for renal patients** | breakfast **for pregnant women** |
| **weight gain** snacks **for dogs** | drinks **for gerd patients** | breakfast **for high blood pressure** |
| **organic** snacks **for kids** | | breakfast **for type 2 diabetes** |
| best snacks **for low blood sugar** | | breakfast **for gestational diabetes** |
| snacks **for gastritis** | | breakfast **for high cholesterol** |
| Personally healthy snacks are key to my daily routines | I seek out better drink options to relieve my health concerns (digestion, chronic illness) | I want to start the day feeling healthy AND functional |



Source: Google Search data (2020-21); US

# How can Mars tap into people's personalized needs?

## QUESTIONS TO GET YOU THINKING...

- Where can Mars products communicate to different health contexts and needs for human & pets?
- How can Mars position solutions as balanced and nuanced, instead of either or?

# Summary

# Three shifts that define how you relate to consumers' healthy eating and drinking habits



## 01

I make lifestyle choices to care for **my whole self**, not just my body

How can your products **support people's healthier lifestyles holistically** by providing nutrition, well-being and eco-friendly choices?



## 02

I'm **empowered to make decisions**, not just gather information

How can your brand **be a trusted resource for people and help them take informed action** as they learn and cook for their health goals?



## 03

I want **personalized options** I can do on my own terms

How can you **provide more personalized options** to fulfill people's own personalized wellbeing expectations as well as to help them well-balance?

# Tell us how we can help you!

**Feedback:**https://forms.gle/97UbSpMoFyqEsfmq5

# Insight Project Request:

**Request:**https://forms.gle/hbJTPPPJ6yz6FDYs5



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# Thank you!

# Questions?