Harnessing total wellness to grow revenue

How CPG brands can capture shoppers searching for trending product attributes

Contents

Executive summary

Health and wellness concerns are increasingly driving consumer buying decisions. Consumers want products based on their interest in sustainability, social impact, animal welfare, local sourcing, BIPOC-owned businesses, and more. Additionally, shoppers want to take charge of their health. They are looking to boost immunity, improve gut health, reduce sugar intake, and make other health-related lifestyle upgrades. Online and in-store, shoppers are searching for products with specific ingredients and functional benefits.

Because of the growing interest in total wellness, CPG brands are starting to recognize a multi-billion-dollar market opportunity. This opportunity exists for companies that deliver a customer experience optimized for product discovery that makes it easy for shoppers to find products with specific attributes. Brands and retailers that make these product attributes easy to identify and find in searches will be able to profit from this potential market growth.

The opportunity is significant: 95% of CPG products that qualify for the most frequently searched product attributes do not appear in search results. The consequence is dissatisfied, disengaged customers and missed revenue.[1] A data-driven health and wellness personalization strategy will improve the customer experience and help brands and retailers grow revenue in the process.

This report explores proven and emerging trends in health and wellness product attribute searches and the opportunities available through identifying, recognizing, and activating product attributes. It also offers a playbook for how to engage shoppers who are searching for products with these attributes.

95% of CPG products that qualify for the most frequently searched product attributes do not appear in search results for those attributes

1 https://nielseniq.com/global/en/insights/infographic/2021/reliance-on-search-queries-makes-personalized-shopping-experience-a-necessity/

Introduction

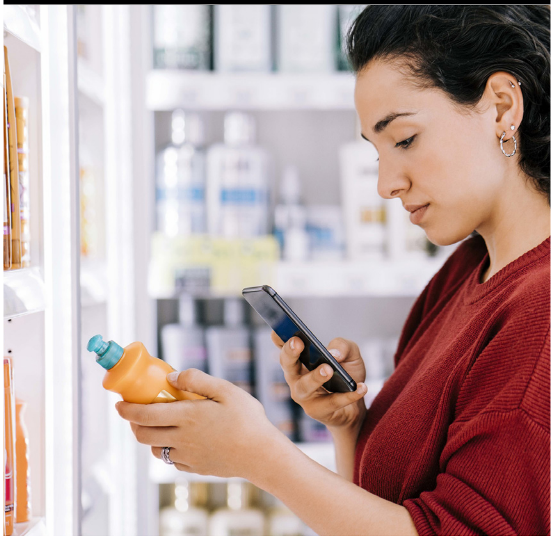
Increasingly, today's consumers make buying decisions with health and wellness in mind. From lifestyle choices to medical needs, the criteria that drive purchase behavior have shifted to prioritize health concerns. For this reason, consumers are increasingly motivated to purchase products with specific attributes that meet their health or lifestyle needs such as ketogenic, low-sugar, and peanut-free. According to new research by Walker Sands in collaboration with NielsenIQ, consumers shop for specific attributes for many reasons, ranging from specific dietary needs to general health and wellness lifestyle choices. Overall, they are primarily concerned with how the products they purchase will impact their health.[2]

The health and wellness segment is projected to accelerate from $175 billion in sales today to $203 billion in sales by 2023 in the U.S. alone.[3] Because the majority of CPG products don't claim qualifying attributes—either on-package or in their online product content—many CPG brands are missing out on this market growth. Their products simply aren't being found by shoppers who search for the attributes that the products qualify for.

The problem is not only that CPG brands aren't claiming the attributes their products qualify for but CPGs also often have a blind spot to their product's ingredients and the needs that their products meet. For example, Protein is the number one specialty diet attribute across food and beverage e-commerce searches, with only 2/3 of products eligible to make a protein claim actually making one.

In many cases, brands don't even know what attributes are trending or what trends are emerging. This lack of visibility means brands are unsure how to direct innovation, product launches, brand marketing and promotions, e-commerce experiences, personalization, or retail media campaigns. Manufacturers and retailers can improve existing product discoverability with deeper product attribute knowledge. They can get ahead of the latest trends in the marketplace by measuring and understanding the attributes that matter most to their shoppers.

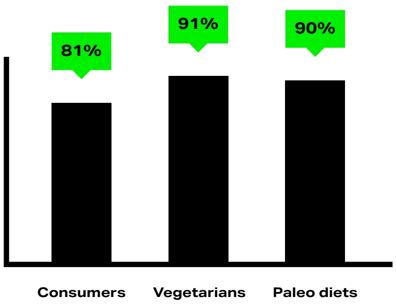
The health and wellness segment is projected to accelerate from $175 billion in sales today to $203 billion in sales by 2023 in the U.S. alone



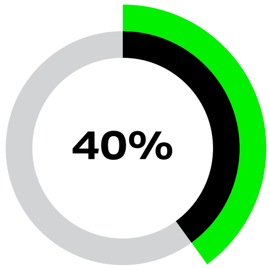
2 NielsenIQ Label Insights/Activating Attributes Quick Poll Topline Findings
3 https://nielseniq.com/global/en/insights/infographic/2021/reliance-on-search-queries-makes-personalized-shopping-experience-a-necessity/

Values-based buying

Shoppers are more motivated to choose products that represent their own personal values. For example, they might choose products that obviously help the environment or have ingredients that assist with health concerns or contribute to an overall healthier lifestyle.

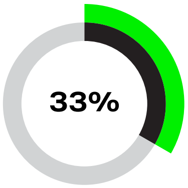


The majority of consumers and specialty dieters are willing to spend more on products that have their desired attributes.

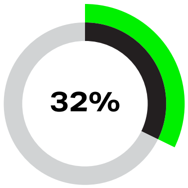


of consumers have switched products due to more robust attribute information in the past 12 months.

Consumers shopping for organic products compared to the average consumer

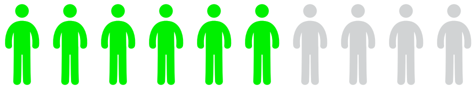


are more concerned about their impact on the environment.



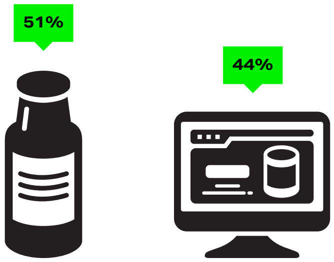
are more concerned about living according to personal values.

Average consumer 40%

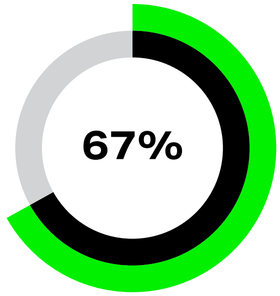


Consumers with allergies/intolerences 60%

switched to a product's competitor because it had more robust and trustworthy information about their desired attribute(s).



A majority of consumers say it's difficult to identify whether products have a specific attribute when looking at the product's label, and a significant amount say it's difficult to identify attributes when looking at the product's online description



of consumers will do additional research to make sure a product meet's their needs beyond what's provided on a product's label or online description.

Top 100+ missed revenue opportunities by brand

One of the most revealing insights from the NielsenIQ Label Insight data collected is the dollar amount of e-commerce revenue each grocery CPG brand is missing out on by not optimizing for attributes. Here are the top 145 missed revenue opportunities by brand.

Methodology

- Trending Attributes are identified by aggregating long-tail category and attribute specific searches.
- **Annual unclaimed search volume** aggregates missed impressions across a brand's portfolio for category searches products qualify for, but are not claiming on pack.
- **Annual missed revenue from unclaimed search volume** applies average unit price and actual keyword conversion rates and to quantify missed opportunity.

#	Brand	Annual unclaimed search volume	Annual missed revenue from unclaimed search volume
1	PEPSICO INC	5,773,621,977	$1,883,932,851
2	CONAGRA INC	5,669,785,783	$1,569,736,892
3	ABBOTT LABORATORIES INC	4,140,294,399	$4,888,114,373
4	NESTLE HOLDINGS INC	3,714,278,902	$1,712,654,002
5	KELLOGG COMPANY	3,699,483,532	$1,322,565,363
6	GENERAL MILLS	3,209,402,362	$1,021,649,054
7	DAIRY FARMERS OF AMERICA INC.	2,830,460,305	$1,028,079,792
8	DOLE FOOD COMPANY INC	2,801,041,008	$899,722,382
9	CAMPBELL SOUP CO	2,758,549,525	$864,970,789
10	POST HOLDINGS INC	2,728,359,044	$1,224,896,793
11	B & G FOODS INC.	2,403,992,358	$775,431,775
12	DANONE NORTH AMERICA	2,364,260,575	$800,349,490
13	DEL MONTE FOODS COMPANY	1,671,619,393	$319,446,466
14	THE KRAFT HEINZ COMPANY	1,666,098,767	$611,125,028
15	H. P. HOOD INC.	1,588,945,086	$726,751,703
16	MCCORMICK & COMPANY INC.	1,362,258,840	$388,734,183
17	COCA-COLA COMPANY	1,279,119,496	$433,928,498
18	PRAIRIE FARMS DAIRY INC	1,207,989,111	$394,215,166
19	GLANBIA PLC	1,126,295,387	$713,823,490
20	KENT CORPORATION	1,041,142,211	$169,123,141
21	UNILEVER GROUP	945,252,388	$411,751,940
22	GOYA FOODS INC	943,255,917	$208,695,372
23	HORMEL FOODS CORPORATION	838,997,819	$427,276,419
24	KEURIG DR PEPPER	761,114,667	$270,271,818
25	UTZ QUALITY FOODS INC.	696,115,437	$245,325,002
26	GRUPO BIMBO S.A. DE C.V.	690,614,865	$270,223,784
27	BOB'S RED MILL NATURAL FOODS	631,799,225	$368,288,404
28	FLOWERS FOODS INC.	599,694,915	$218,288,949
29	J. M. SMUCKER COMPANY THE	544,476,586	$399,482,471
30	NATURE'S PATH FOODS INC.	527,066,850	$243,062,149
31	PROCTER & GAMBLE COMPANY THE	513,488,517	$308,411,473
32	CLIF BAR INC.	508,099,588	$198,362,079
33	RED GOLD INC.	456,834,443	$66,515,095
34	MIZKAN GROUP CORP	432,608,587	$116,942,753
35	MARS INCORPORATED	420,413,482	$169,632,636
36	HAIN CELESTIAL GROUP	396,306,296	$184,139,757
37	MONDELEZ INTERNATIONAL INC	385,644,828	$137,135,301
38	L'OREAL SA	345,924,014	$246,626,526
39	LA PREFERIDA INC	331,810,947	$66,475,005
40	THE HERSHEY CO	294,987,826	$76,655,536
41	STARBUCKS COFFEE CO	288,126,405	$123,606,228
42	CARGILL INCORPORATED	280,679,174	$217,175,511
43	JOHN B SANFILIPPO & SON INC	269,800,455	$173,967,333
44	CHOBANI INC	260,821,315	$47,910,267
45	SAPUTO INC.	232,696,884	$119,517,774
46	OCEAN SPRAY CRANBERRIES INC	230,372,504	$94,420,474
47	COLGATE-PALMOLIVE COMPANY	203,522,192	$92,964,867
48	NEWMAN'S OWN INC	188,630,141	$98,397,027
49	MCKEE FOODS CORPORATION	169,389,963	$41,588,624
50	SIMPLY 7 SNACKS LLC	162,410,751	$59,169,485

#	Brand	Annual unclaimed search volume	Annual missed revenue from unclaimed search volume
51	EDEN FOODS INC.	155,795,146	$68,967,395
52	JOHNSON & JOHNSON	152,727,366	$106,719,774
53	SMITHFIELD FOODS INC	146,780,340	$63,878,804
54	JELLY BELLY CANDY COMPANY	134,701,156	$32,077,733
55	G L MEZZETTA INC.	129,068,933	$52,815,007
56	OLD DUTCH FOODS LTD	127,560,934	$48,757,616
57	TYSON FOODS INC	127,538,511	$77,492,399
58	TILLAMOOK	119,456,265	$55,606,891
59	FERRERO S.P.A	117,422,723	$29,097,351
60	AMY'S KITCHEN INC.	110,702,284	$53,752,601
61	CALIFIA FARMS LP	108,447,254	$52,008,050
62	BARILLA G & R F.LLI S.P.A.	97,967,793	$18,251,400
63	SARGENTO FOODS INC	96,107,862	$42,652,669
64	LAND O'LAKES INC	95,845,592	$49,341,311
65	PACIFIC COAST PRODUCERS	92,536,497	$14,645,751
66	THE CLOROX COMPANY	91,811,107	$39,144,584
67	KIND LLC	91,165,821	$33,869,926
68	FERRARA CANDY COMPANY INC	78,926,722	$20,718,265
69	GLAXO SMITH KLINE PLC	76,446,656	$44,576,045
70	LINK SNACKS INC.	74,522,971	$36,814,348
71	OLE MEXICAN FOODS INC.	66,686,935	$21,930,665
72	S C JOHNSON & SON INC	63,794,675	$36,863,753
73	BUSH BROTHERS & COMPANY	62,254,416	$12,819,429
74	HENKEL KGAA	59,695,868	$27,899,461
75	SPICEOLOGIST	56,667,519	$44,338,934
76	PARFUMS DE COEUR LTD	55,307,027	$27,894,652
77	RICH PRODUCTS CORPORATION	54,408,989	$53,079,233
78	HOSTESS BRANDS LLC	50,559,837	$13,275,496
79	KING'S HAWAIIAN BAKERY WEST	45,449,538	$21,045,409
80	BONE BROTH CO	43,466,023	$38,786,906
81	TOO GOOD GOURMET INC	39,970,223	$18,437,464
82	KEN'S FOODS INC.	39,813,583	$12,318,323
83	PAMELA'S PRODUCTS INC.	39,362,890	$24,625,424
84	SUNKIST GROWERS INC	34,705,303	$18,822,074
85	RUDI'S ORGANIC BAKERY	34,242,656	$21,613,622
86	EVOLVE BRANDS LLC	34,162,497	$12,844,074
87	BLUE DIAMOND GROWERS	32,794,949	$16,074,116
88	SUN-MAID GROWERS OF CALIFORNIA	32,148,804	$13,645,238
89	SARATOGA CHIPS LLC.	31,979,565	$12,445,168
90	CANIDAE CORPORATION	31,117,385	$61,530,272
91	DIETZ & WATSON INC	28,800,352	$18,243,583
92	CALIFORNIA FLAVORED NUTS	28,253,336	$18,842,997
93	THE HONEST COMPANY INC	27,295,581	$27,880,798
94	YES TO LTD	26,100,921	$11,270,117
95	NATURESWEET LIMITED	25,264,062	$12,480,447
96	JOHNSONVILLE SAUSAGE INC	25,202,700	$11,688,004
97	DAIYA FOODS INC	25,189,685	$15,666,473
98	PACIFICA BEAUTY LLC	25,070,444	$21,725,545
99	FAGE DAIRY INDUSTRY SA	24,559,605	$6,153,655
100	CHURCH & DWIGHT COMPANY INC.	24,370,163	$10,438,716

#	Brand	Annual unclaimed search volume	Annual missed revenue from unclaimed search volume
101	18 RABBITS	23,618,427	$17,808,058
102	PRESTIGE BRANDS HOLDINGS INC	23,250,295	$10,606,087
103	THE STASH TEA COMPANY	22,840,029	$7,356,317
104	DAVID'S CONDIMENTS INC	22,009,517	$16,057,263
105	HEALTH-ADE	21,872,973	$8,538,552
106	OATLY AB	21,714,198	$11,703,953
107	BEIERSDORF AG	21,423,935	$14,856,428
108	MCCORMICK & COMPANY, INC.	20,667,255	$16,701,415
109	DIAMOND FOODS INC	19,524,079	$12,716,033
110	SUNSWEET GROWERS INC.	18,994,937	$11,605,907
111	ARCTIC ZERO INC	18,969,925	$10,094,466
112	SABRA DIPPING COMPANY LLC	18,891,601	$9,296,557
113	THE CHEESECAKE FACTORY	18,402,461	$16,385,551
114	LIFEWAY FOODS INC	18,392,155	$7,106,729
115	HALO PURELY FOR PETS	18,304,759	$19,155,930
116	RAW NATURE 5 INC	16,799,149	$7,456,638
117	THE REPUBLIC OF TEA INC	16,027,658	$25,182,977
118	REAL PET FOOD COMPANY	15,380,653	$7,232,752
119	JOHN F MARTIN & SONS INC	14,649,026	$7,664,956
120	OASIS MEDITERRANEAN CUISINE	13,987,709	$6,279,922
121	MICHEL DESIGN WORKS	13,305,362	$16,598,439
122	KISS MY FACE CORP.	13,150,152	$7,924,019
123	THE WONDERFUL COMPANY LLC	12,794,368	$9,500,330
124	KIMBERLY-CLARK CORPORATION	12,664,035	$8,989,439
125	EARTH SCIENCE INC	12,624,731	$9,712,584
126	MIYOKO'S CREAMERY	11,880,547	$9,392,285
127	MOTHER KOMBUCHA LLC	11,838,362	$3,450,764
128	DR. PRAEGER'S SENSIBLE FOODS I	11,618,915	$5,808,993
129	PERRIGO	11,447,058	$4,482,897
130	I AND LOVE AND YOU	11,275,410	$7,581,586
131	EDEN BODY WORKS LLC	11,053,200	$8,189,095
132	ZEVIA LLC	10,344,585	$5,555,456
133	FIG FOOD COMPANY LLC	10,173,393	$4,370,184
134	JAMBA JUICE COMPANY	9,747,483	$2,810,102
135	GOODWILL NORTHERN MICHIGAN	9,104,403	$6,671,524
136	GREAT HARVEST BREAD CO	9,059,617	$7,620,044
137	CLEVELAND KRAUT	8,813,772	$6,157,654
138	DK COSMETICS	8,688,783	$1,959,929
139	EL PASO CHILE CO.	8,524,772	$4,752,987
140	JONES SODA CO	8,513,132	$1,185,028
141	COUNTRY ACRES	8,130,702	$4,354,641
142	SOAPBOX SOAPS	7,491,291	$3,976,827
143	CONAIR CORPORATION	7,313,754	$8,459,234
144	ARTHUR PET PRODUCTS LLC	6,455,286	$10,694,343
145	BRIX SODA COMPANY	5,393,454	$1,114,503

Today's trending attributes across CPG categories

What are the current proven and growing trends we can expect over the next year? Here are the top findings based on an analysis of Q2 2021 search and attribute data from NielsenIQ Label Insight's platform and market measurement data from NielsenIQ.

Health and beauty

- **Across all health and beauty: Aluminum free —** 120% growth in search volume in 6 months. 446K annual searches. 63K personal care products qualify for this attribute and aren't claiming on package.
- **Across all health and beauty: Biodegradable —** Shows strong sales growth vs a year ago at 7.1% and huge growth vs pre-covid (2 years ago) at 73%. 36% growth in search volume. 35K annual searches.
- **In haircare: Free from sulfates —** Sales growth 3.2% current period vs year ago, 10.0% vs 2 years ago. 510K annual e-commerce searches. $4B in sales in the last 52-week period.
- **In bath and body wash: Not tested on animals —** Sales growth 15.6% current period vs year ago, 48.6% vs 2 years ago. $1.1B in sales in the last 52-week period.
- **In eye makeup: Cruelty free —** Sales growth 25.2% current period vs year ago, 29.4% vs 2 years ago. 8K annual e-commerce searches. $125M in sales in the latest 52-week period.
- **In makeup: Oil-free —** 8K annual e-commerce searches. 3,500 qualifying products not claiming on pack.

67k annual searches	**49k** annual searches	**292k** annual searches	**528k** annual searches	**35k** annual searches
6.5% conversion rate	**8.7%** conversion rate	**5.1%** conversion rate	**6.2%** conversion rate	**5.2%** conversion rate
SLS free	Humane	Vegan	Sulfate free	Biodegradable
$23.1b dollar sales	**$2.6b** dollar sales	**$2.0b** dollar sales	**$17.1b** dollar sales	**$567.1m** dollar sales
1.3% dollar growth	**8.9%** dollar growth	**20.2%** dollar growth	**2.5%** dollar growth	**7.1%** dollar growth

Source: NielsenIQ Retail Measurement Services, Product Insight, powered by Label Insight, Total US xAOC L52W ending 7/30/21; Beauty & Personal Care

Next-generation sustainability searches in HBC

305%	**Reef safe**
130%	Plastic free
38%	Refillable
36%	Biodegradable

"Better for we" sales growth in body wash

330%	**Renewable resource**
542%	Family farmed
15.6%	Not tested on animals
22.3%	Cruelty free

Forward looking beauty consumers are looking for long-term sustainable solutions and products that do no harm.

Label Insight e-commerce trends data from Amazon, Instacart, Shipt, Target, Walmart, Kroger, powered by SimilarWeb. Last 6 months, March 2021 - September 2021

Food and beverage

- **In all food and beverage: Plant based —** Sales growth 12.4% current period vs year ago, 36.9% vs 2 years ago. 55K annual e-commerce searches. $312M in sales in the last 52-week period. 296 qualifying products not claiming on pack.
- **In all food and beverage: Low fat —** Sales growth 28.2% current period vs year ago, 76.5% vs 2 years ago. 2,472 qualifying products not claiming on pack.
- **In all food and beverage: Non dairy —** Sales growth 9.7% current period vs year ago, 32.0% vs 2 years ago. $4B in sales in the last 52-week period. 70 qualifying products not claiming on pack.
- **In yogurt: Vegan —** Sales growth 9.7% current period vs year ago, 28.5% vs 2 years ago. 330K annual e-commerce searches. $265M in sales in the last 52-week period. 18 qualifying products not claiming on pack.
- **In cakes and desserts: Ketogenic —** Sales growth 39.1% current period vs year ago, 917% vs 2 years ago. 177K annual e-commerce searches. $130M in sales in the last 52-week period.
- **In cereals: Free from grain —** Sales growth 61.3% current period vs year ago, 239.5% vs 2 years ago. 61K annual e-commerce searches. $49M in sales in the last 52-week period.

19% search growth

3.2m annual searches	**2.2m** annual searches	**6.9m** annual searches	**750k** annual searches	**5.1m** annual searches
6.8% conversion rate	**7.8%** conversion rate	**6.4%** conversion rate	**7.5%** conversion rate	**5.4%** conversion rate
KETO Ketogenic	Raw	V Vegan	Grass fed	Sugar free
$70.1b dollar sales	**$2.7b** dollar sales	**$77.9b** dollar sales	**$906m** dollar sales	**$45.2b** dollar sales
5.0% dollar growth	**13.0%** dollar growth	**4.1%** dollar growth	**5.1%** dollar growth	**5.0%** dollar growth

Source: NielsenIQ Retail Measurement Services, Product Insider, powered by Label Insight, Total US xAOC L52W ending 7/30/21; Food & Beverage

From clean label to sustainability in food and beverage

Sustainability claims continue strong double-digit growth across the board when comparing to pre-COVID period.

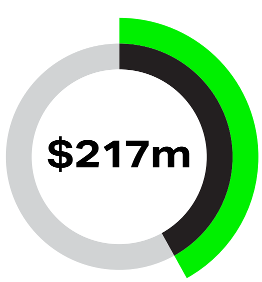
+27.1%	+16.4%	+13.2%	+18.0%	+16.1%	+23.8%
Social responsibility	Sustainable farming	Sustainable resource management	Sustainable forestry	Sustainable packaging	Animal welfare
B corporation +26% **Ethical +23%** **Fair trade +21%**	**Sustainable farming +16%**	**Carbon footprint +12%** **Renewable energy +7%**	**Palm oil free +16%** **Forest stewardship council +22%** **Rainforest alliance certified +8%**	**Recyclable +15%** **Recycled packaging content +7%** **Terracycle +17%**	**Farm raised +36%** **Cage free +22%** **Grass fed +21%** **Free range +25%** **Pasture raised +22%**

Source: NielsenIQ Retail Measurement Services, Product Insight, powered by Label Insight, Total Food & Beverage; Total US xAOC L52W ending 8/14/21 vs 2YA

Household cleaners

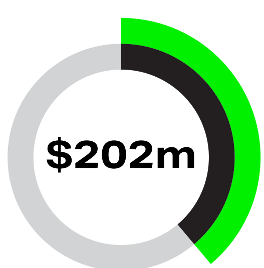
- **Hypoallergenic —** Sales growth 2.7% current period vs year ago, 93.3% vs 2 years ago. 40K annual searches.
- **Bleach-free —** Sales growth 21.8% current period vs year ago, 75.5% vs 2 years ago. 48K annual searches.
- **Unscented / naturally scented —** Growth in searches for unscented or naturally scented (i.e. contains lavender essential oils) laundry detergent and dryer sheets. 83K annual searches, 5% growth in search volume in last year. 4.8% sales growth in last year, 18.5% sales growth in the last 2 years.

Top claims in green household cleaners



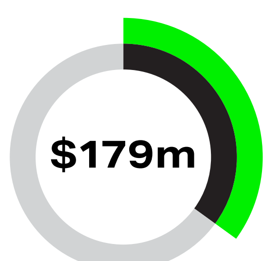
Plant based

42% of green HH cleaners are plant based



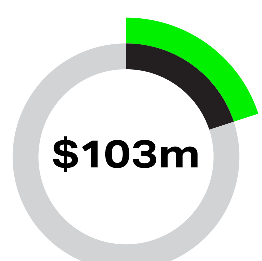
Naturally derived

39% of green HH cleaners are naturally derived



Non-toxic

35% of green HH cleaners are non-toxic



EPA safer choice

20% of green HH cleaners are EPA safer choice

Pet food

- **Grain free —** Sales growth 4.9% current period vs year ago, 13.3% vs 2 years ago. 183K annual searches.
- **Joint health —** Sales growth 2.8% current period vs year ago, 19.3% vs 2 years ago. 31K annual searches.
- **Digestive support —** 6.4% current period vs year ago, 21.4% vs 2 years ago. 25K annual searches.

Grain free	Joint health	Vegan	Digestive support	Weight control
183k annual searches	**31k** annual searches	**40k** annual searches	**25k** annual searches	**60k** annual searches
7.8% conversion rate	**10.5%** conversion rate	**7.9%** conversion rate	**8.4%** conversion rate	**12.3%** conversion rate
$3.8b dollar sales	**$2.9b** dollar sales	**$51.7m** dollar sales	**$3.9b** dollar sales	**$1.8b** dollar sales
4.9% dollar growth	**2.8%** dollar growth	**10.9%** dollar growth	**6.4%** dollar growth	**1.7%** dollar growth

Source: NielsenIQ Retail Measurement Services, Product Insider, powered by Label Insight, Total US xAOC L52W ending 7/30/21; Pet Food

The humanization of pet food

		Specialty diets			Functional ingredients			Product details		
	Attribute	Raw	Vegan	Protein	CBD	Probiotics	Pumpkin	Fresh	Frozen	Variety Pack
Food and beverage	Search Volume	2.3m	7.3m	25m	44k	201k	1.3m	13m	13m	887k
Food and beverage	Rank	94th	27th	3rd	515th	361st	130th	9th	11th	161st
Pet food	Search Volume	85k	43k	33k	44k	11k	15k	55k	6k	90k
Pet food	Rank	37th	57th	66th	56th	91st	83rd	48th	99th	36th

Source: NielsenIQ Retail Measurement Services, Product Insight, powered by Label Insight, Total US xAOC L52W ending 7/30/21; Pet Food

The opportunity: Activating trending attributes

Today's consumers are committed to their health and lifestyle choices and they're aligning purchasing decisions with these commitments. 200 million shoppers say they adhere to a particular diet or health-related eating program. Also, 180 million shoppers say a food allergy or intolerance affects their purchasing decisions.[4]

Additionally, 40% of consumers say that they seek products and services aligned with their values, while only 13% are brand-driven.[5] But before shoppers can buy, they must be able to find the products that align with their lifestyle, values, and wellness needs.

More CPG brands are recognizing the current opportunity to improve the shopping experience and capture searches for the attributes their products qualify for. Right now, this opportunity represents a competitive advantage, but it won't be long before activating product attributes becomes table stakes.

The business case for change

As health and wellness rises as a category from the current $175 billion in sales to $203 billion by 2023, we can expect to see increasing demand for shopping experiences that make it easier for consumers to find the products they want based on the attributes they're searching for. And this opportunity isn't only available to niche boutique brands—conventional retail represents 44% of health and wellness product sales.

Ingredient deep dive:
Erythritol

Erythritol is currently winning in the sweeteners space, likely due to the low-carbohydrate lifestyle and keto trend.

- Erythritol is the only **zero-calorie** sugar alcohol.
- Erythritol **does not affect blood sugar levels**, making it ideal for individuals following both **keto** and **diabetic diets**.
- While 26% of products containing erythritol qualify for the keto diet, only **20% of these are making a ketogenic claim**.
- In the cereal & granola and cookies & crackers categories alone, this represents a **$15.7 million** and **$7.24 million** opportunity, respectively.

4 Transparency Trends Report, FMI & Label Insight, 2020
5 https://www.ibm.com/downloads/cas/EXK4XKX8

How to win missed revenue opportunities

To capture this missed revenue opportunity, CPG brands need to adapt to how the modern consumer searches for products, including their strategies for search, taxonomy, and product detail page content. Here are four ways brands can win missed revenue opportunities.

1. Use data to understand your customer: Consumer behavior is constantly changing. New fads develop. New information comes to light. Language shifts. These changes happen quickly—the relative rank of the most-searched attributes on a product changes every month and a half. For example, there might be a high volume of searches for "keto" one month that is replaced by "low carb" the next. Search terms vary by platform as well, adding to the complexity.

Keeping up can be a daunting task, but having a thorough understanding of your customer is crucial to capitalize on shopping trends. Today's CPG brands need a central source of up-to-date data relevant to their customers. This data provides insight on what terms customers are searching now and illuminates trends that will influence demand in the future.

2. Develop an attribute-based keyword strategy: Every product has specific product attribute keywords associated with it, like gluten-free, low-fat, organic, natural, kosher, sugar-free, etc. CPG brands need to optimize their SKUs for search. To do so, they must first know which attributes apply to which products. Brands need to include attribute keywords in the retailer set-up process for each SKU, which will tie the product to those keywords in the retailer taxonomy, and embed the keywords in the back-end content.

3. Use attributes in imagery on the physical and digital shelves: Consumers looking through product images—whether on a physical store shelf or an e-commerce image carousel—should be able to quickly see relevant attributes that they value. Adding relevant product attribute information (like gluten-free or sugar-free) to hero images will encourage shoppers to click. Additionally, product detail pages should include relevant terms that incentivize the consumer to convert or scroll down the page for more details that will lead to a conversion.

Ingredient deep dive:
Inulin

Inulin is a dietary fiber that is often derived from chicory root.

- Inulin is associated with several health benefits, including **digestive health**, **diabetes management**, and **aiding weight loss**.
- Many brands **do not claim any of these benefits** from their products containing inulin.
- In the cereal & granola and cupcake categories alone, inulin represents a **$131 million** and **$157 million** opportunity, respectively.

A playbook for activating trending attributes

40% of consumers have switched products in the past 12 months due to more robust attribute information. Brands that provide comprehensive product information have an opportunity to capture market share from their competitors.[6] Let's look now at a playbook that CPG brands can follow to improve the shopping experience, ensure qualifying products appear in relevant attribute searches, and increase conversions.

Identify missed opportunities

Chances are high that your CPG brand is missing many opportunities to capture shoppers searching for products that align with their health and wellness needs. In a recent NielsenIQ Label Insight audit of the 21 retailers who offered attribute-related search filters, 80% of a consumer's need-states and preferences were overlooked.[7] If you are missing these kinds of opportunities, only a portion of your qualifying products may be claiming relevant attributes, and you may be missing trending terms altogether. Use third-party data to uncover available opportunities to claim product attributes for qualifying products.

Determine which attributes to focus on

Different audiences have different health and wellness priorities and use their own terminology to describe their needs. Using NielsenIQ Product Insight (NPI) data, you can identify which product attributes will be the most advantageous to focus on. Once you've optimized for the most valuable attributes in the most valuable categories, you can then begin another, more granular round of research. Consumers are becoming more educated, searching for product attributes down to specific ingredients.

Position products to highlight attributes

Product attributes can be featured in a variety of ways to attract shoppers.

- **Advertising messages:** Target your product marketing messages to focus on the most popular attributes a product qualifies for.
- **Product packaging text and graphics:** Feature trending attributes on your product packaging via text and graphics.
- **Product detail web page content:** Highlight the attributes a product qualifies for on the product detail page online. Product titles and descriptions should prioritize relevant popular attributes. According to our research, products that include an attribute in the first 40 characters of their title received twice as many clicks as products where the attribute appeared later in the title.

6 NielsenIQ Label Insights/Activating Attributes Quick Poll Topline Findings
7 https://nielseniq.com/wp-content/uploads/sites/4/2021/06/2021_LI-Empty-Aisles-Report_NIQ.pdf

Brand innovation:

Conagra

Conagra is successfully innovating based on health and wellness trends. The company has clearly identified relevant product attributes on product packaging, ranging from dietary preferences to allergens and nutrient claims.

Ingredient formulation	Target audience
Sweetner innovation: • Erythritol* • Stevia* • Allulose	**Dietary preferences:** • Ketogenic* • Kosher* • Plant based*
Isolated fibers: • Inulin • Xanthan Gum	**Allergens and intolerances:** • Gluten free* • Dairy free* • Lactose free*
Nut ingredients: • Contains almonds* • Contains coconut*	**FDA nutrient content claims:** • Excellent source of fiber* • Low sodium* • No added sugar*

* Asterisk identifies the attributes trending in search within the food and beverage space.

Gain a competitive advantage today and prepare for the future

CPG brands are presented with an incredible opportunity to capture new revenue as consumers search for attributes aligned with their health and wellness needs. Accessing the attribute insights relevant to your brand's products and putting these insights into action will allow you to create a better customer experience—increasing revenue as a result. With up-to-date insights that reflect current market trends and emerging trends, you'll position your brand to gain a competitive advantage today and prepare for the future.

How NielsenIQ Total Wellness can help

NielsenIQ Total Wellness solutions are designed to help CPG brands and retailers boost revenue. Clients can tap into the most robust and comprehensive product attribute data available in the wellness category in tandem with NielsenIQ's global market measurement data to:

- **Deliver data-driven insights:** Gain actionable insights like the ones revealed in this report. Leveraging machine learning, NielsenIQ Label Insight technology covers 99% of consumer queries and provides 24,000 attributes per product.
- **Size the market opportunity:** Which emerging trends are winning in your category? Who are your competitors in wellness? Take analytics-driven snapshots of your marketplace to inform better decisions.
- **Understand consumer intent:** What are shoppers searching for? What specific attributes are most important for your brand? See why consumers are choosing to buy one brand over another and define actionable search content to optimize the shopping journey.
- **Retail digital discovery:** Tap into an API feed of every product carried and every attribute associated with the product. As monthly online grocery sales grow over $9 billion, it's essential to have insightful attribute data, ensuring product discoverability and building consumer loyalty in an omnichannel marketplace.
- **Tracking for better ad targeting and product development:** Track what customers are buying to more effectively target your advertising and gain important insights for developing new products.
- **Opportunity-cost analysis:** Evaluate the opportunity cost of including "gray-area" attributes (such as "healthy"), so you know what your risk is compared to the reward.
- **Prepare for the future:** Ensure that customers will be able to find your products for any term searched in the future, including new fad diets, via algorithms that automatically identify which attributes are applicable. Deliver future growth with highly informed product enhancements aligned with emerging health and wellness trends.

Put attribute data to work for your brand

Request a curated data audit of your product portfolio to see how we can help you take advantage of missed revenue opportunities.

Request your audit

nielseniq.com/wellness

NielsenIQ

Who is NielsenIQ?

NielsenIQ is the leader in providing the most complete, unbiased view of consumer behavior, globally. Powered by a groundbreaking consumer data platform and fueled by rich analytic capabilities, NielsenIQ enables bold, confident decision-making for the world's leading consumer goods companies and retailers.

Using comprehensive data sets and measuring all transactions equally, NielsenIQ gives clients a forward-looking view into consumer behavior in order to optimize performance across all retail platforms. Our open philosophy on data integration enables the most influential consumer data sets on the planet. NielsenIQ delivers the complete truth.

NielsenIQ, an Advent International portfolio company, has operations in nearly 100 markets, covering more than 90% of the world's population. For more information, visit **nielseniq.com**.