



How America Eats

The Crucial Role of Food Culture Inside Weight Management



Report Overview

Where do consumers place the blame for obesity?

How do today's consumers define obesity?

Have these views changed over the past 7 years?

For food companies, marketers, health care providers and policy makers understanding the culture of food and occasions for eating is the key to finding effective solutions that affect real change in eating behaviors. With more than 190 million American consumers overweight or obese and the obesity rate among children tripling in the last 30 years, consumers' decisions about what, when and where to eat have significant implications across every aspect of the food manufacturing, food service, marketing and retailing market place.

The Hartman Group's *How America Eats* report is a holistic exploration into the intersections of culture of food, eating behaviors and consumer perceptions of healthy eating and weight management. This report goes beyond merely investigating consumers' attitudes on weight management and healthy eating. It provides new revelations into the roles consumers expect food companies, retailers, food service (restaurants), health care providers and policy makers to play that will help them meet their healthy weight aspirations and wellness lifestyle goals.

How America Eats builds from the Hartman Group's landmark 2004 *Obesity in America* report and provides new insights on where consumers are at today with regard to their weight management journey and on how the perception of obesity has changed in the past seven years.



How America Eats

The Crucial Role of Food Culture Inside Weight Management

Research was conducted to explore and reveal emerging trends around weight management, labeling, and messaging and communication of weight management claims. Other topic areas include:

- General approaches to eating
- Approaches to eating in general
- Defining obesity/overweight
- Weight self-assessment
- Attempts at weight management
- Assessment of obesity crisis
- Child obesity
- Nutrition labeling
- Eating occasions
- Information sources
- Products and brands
- Shopping channels/retailers
- Respondent demographics

Table of contents:

Introduction,
Executive Summary
Methodology
Consumer Attitudes Toward Obesity

- Childhood Obesity

Weight Management Consumer Segmentation

- Occasions & Weight Management
- Demographics & Weight Management

Communicating Nutritional Information
Key Takeaways
Recommendations

Methodology

Integrated qualitative ethnography and quantitative online survey. Qualitative fielding in two major US markets: Chicago and Seattle. Online survey: nationally representative sample of 1,790 adult U.S. consumers 18 years of age or older including oversampling of Hispanic consumers.

Report Deliverable

140 pages in PowerPoint format. Includes a set of data tables by standard demographics in Excel format. Included are business recommendations on:

- leveraging the importance of occasions for weight management
- communicating nutritional information
- communicating to weight managers according to segment
- communicating with consumers using language that reflects how they view themselves

Consumer Attitudes Toward Obesity

42%

think childhood obesity in America is a “big problem”

23%

overweight consumers eat breakfast only once a week (if at all)

55%

Underestimate the number of calories they should consume by more than 200 calories

Source: 2011 How America Eats Syndicated Study, The Hartman Group



How America Eats

The Crucial Role of Food Culture Inside Weight Management

REPORT INTRODUCTION

In 2004, we introduced our national study on obesity with these still relevant thoughts:

“The experts all agree. Obesity is a national health problem of epidemic proportions. Yet, while public health officials, policy analysts, nutritionists, the media, retailers and manufacturers watch the number of overweight and obese individuals increase, they remain unable to answer a very important question. Namely, how is it that most overweight individuals appear unable to address their “problem”? To be sure, consumers are very concerned about the “problem of obesity,” but this often comes down to just “talk” as there are a host of other issues consumers claim to be concerned about but don’t take action on. Questions about how obesity, the problem, affects individuals’ day-to-day lives remain largely unanswered.”

Our 2004 study addressed these questions and established a baseline of cultural insights for how consumers viewed themselves and behave in the context of obesity. The study was timely, as the Institute of Medicine had simultaneously reported it’s now oft-quoted statistic that “one in three children, [are] overweight or obese”--a number now joined with the figure that “two in three” American adults are similarly afflicted.

Flash forward to today, and obesity has been pushed all the way to the doors of the White House, with Michelle Obama taking an active role advocating a healthy food doctrine to the food and beverage industry while simultaneously forming “Let’s Move.” Also, in 2011, the U.S. Department of Agriculture issued its 2010 Dietary Guidelines for Americans which includes “a focus on balancing calories to manage weight, a focus on food and food components consumers should reduce their consumption of, and a focus on foods and nutrients consumers should increase consumption of.”

Clearly, our current report is timely given what appears to be a redoubled effort socially to examine underlying reasons for, and corresponding ways by which to “combat” the obesity epidemic.

How America Eats provides key insights on:

Where
we eat

What
we eat

When
we eat

Who
we eat with

Why
we eat



How America Eats

The Crucial Role of Food Culture Inside Weight Management

REPORT INTRODUCTION (continued)

As with today, the social framework in 2004 surrounding obesity tended to point fingers in the direction of food and beverage manufacturers, fast food/foodservice operators, an overall lack of exercise amongst our citizenry, and ingredients like fat, salt, and sugar as primary culprits leading to obesity in the population.

As you'll see in the following study, these culprits are seen by consumers as some of the many contributing factors leading to obesity in our culture today. Yet, more specifically, they blame themselves soundly for weight conditions, and voice many fundamental factors that go beyond "food" that contribute to weight management challenges. These factors derive from cultural weight management practices and behaviors that are consistently challenged by diverse forces associated with modern lifestyles, not the least of which include diverse eating occasions, settings and emotional states, any number of which may foster or inhibit the potential for successful weight management. Central to understanding these forces, and a key finding from our study, is the notion that consumers today perceive how (not just what) our culture eats as the cause of obesity: A common refrain heard is "Americans eat too much and too often, and aren't active enough."

Major causal factors derived from language analysis linking to this encompassing view relate food occasions (where we eat, who we eat with, and when we eat) as well as objective (what we eat) and emotional constructs (e.g., craving, indulging) as working together to influence cultural eating habits, one result of which is obesity. Depending on where consumers are in the weight management journey, almost half (47%) are conflicted today in terms of how to manage and effectively deal with factors that lead to obesity. Diverse stakeholders – including manufacturers, retailers, foodservice providers, government and the media, have numerous opportunities to assist the public as they navigate the complex world of weight management, nutrition and eating occasions."





How America Eats

The Crucial Role of Food Culture Inside Weight Management

Sample Pages From the Report

Executive Summary

Consumer Attitudes Towards Obesity

Paralleling our 2004 study, being overweight is the "new normal": Consumers believe that America is accustomed to increasing waistlines. "The shame factor for fat has diminished these days."

Consumers perceive how our culture eats as the cause of obesity. Major causal factors derived from language analysis that link to this view relate to food occasions (where we eat, who we eat with, and when we eat) as well as objective (what we eat) and emotional constructs (why we eat: spontaneous, craving, indulging) all of which influence cultural eating habits.

Consumers use their activity level and their social network as a visual standard to gauge whether or not they are overweight: "I'm in pretty good shape. Of course I could lose a few. We all can these days."

CONSUMER ATTITUDES TOWARDS OBESITY

My, how times have changed!

Our Past...

Amazing Stats in Weight Gain, How it Happened, All Year Discovery

Today...

Timeline: Trying to Whip Us Into Shape

Jack LaLanne opened his first health club in 1936, but most fitness really took off after he began appearing on television. Related Article - Overweight Not Just About...



FACTORS CONTRIBUTING TO OBESITY IN AMERICA

Junk food, comfort foods and frequent snacking present the largest challenges to overweight consumers

Challenge	Underweight	Normal weight	Overweight	Extremely overweight
Junk food	20%	47%	22%	22%
Comfort foods	20%	45%	21%	21%
Frequent snacking	22%	47%	20%	21%
Wanting to eat more than a single serving	22%	41%	20%	21%
Eating due to boredom	22%	38%	21%	21%
Eating due to stress/frustration	22%	37%	21%	21%
Eating too much fast food	22%	36%	21%	21%
Healthy/fresh food being too expensive	21%	35%	21%	21%
Dairy products (e.g., cheese, yogurt, ice cream)	20%	35%	21%	21%
Healthy meals being too time-consuming or difficult to prepare	20%	33%	21%	21%
Eating due to sadness/depression	11%	31%	20%	21%
High-calorie non-alcoholic beverages (e.g., sodas, milk shakes)	12%	30%	20%	21%
Difficulty in determining appropriate portion sizes	12%	29%	21%	21%

Q21: Which of the following presents challenges with eating right when you're trying to reach your weight? (Same with 20% or more overall are shown.) See slide 10.

© 2011 The Hartman Group, Inc. 26

How America Eats

The Crucial Role of Food Culture Inside Weight Management



Order Form and Site License Agreement

Report Costs

Global Corporate site license
(multiple brands and business divisions)
\$17,500

Single User site license
(single company, brand consultancy or agency)
\$15,000

Institution site license
(academic or government agency)
\$13,000

Contact Information

To learn more or sign up for the study:

Blaine Becker
Sr. Director, Marketing & Business Relations
425.452.0818, ext. 124
fax: 425.452.9092
blaine@hartman-group.com

Name _____

Title _____

Company _____

Address _____

City /
State /
Zip _____

Phone _____

Fax _____

Email _____

Signature _____

Date
Signed _____

<input type="checkbox"/> Global corporate site license	\$17,500	\$
<input type="checkbox"/> Single user site license	\$15,000	\$
<input type="checkbox"/> Institution site license	\$13,500	\$
Total		\$
<input type="checkbox"/> I am interested in a presentation, please contact me to discuss options and costs		

The Hartman Group, Inc.
3150 Richards Road, Ste 200
Bellevue, WA 98005
tel: 425.452.0818
fax: 425.452.9092
www.hartman-group.com