

A FoodMinds Survey on the Role of Government in Food and Nutrition

The Rise of the U.S. Food Temperance Movement

FoodMinds' experience in tracking the evolution of food policy and communications has led to the hypothesis that we are in the middle of a growing "Food Temperance" movement.

With the obesity epidemic as the unifying call to action, a confluence of factors is driving and defining this temperance movement: widespread food label reform including the first-ever multi-agency alignment among the Food and Drug Administration (FDA), Federal Trade Commission (FTC), Centers for Disease Control and Prevention (CDC) and United States Department of Agriculture (USDA); scrutiny of health claims across the board; and increasingly vocal and powerful special interest pressures.

In January 2010, FoodMinds' Strategic Insights experts conducted the Food Temperance survey to look at the opinions of primary grocery shoppers* and measure awareness of, support for and reactions to, government activities related to classifying foods as "healthy" and "unhealthy." Also examined was a carefully defined subset of opinion leader shoppers – grocery decision makers who are registered voters likely to exert their opinions through political, social and economic actions. The intent was to better understand whether these groups think Americans need help from the government in selecting healthy foods.

* This opinion poll was fielded through Greenfield Online's Omnibus service on January 18th, 2010. The sample of 1045 adults is balanced on age, gender and region of the U.S. Sub-samples of 869 primary grocery shoppers and 182 opinion leader shoppers were screened from the overall adult sample. The MOE is +/- 3% for primary grocery shoppers and +/- 7% for the opinion leader shoppers.

2010: The Year of Food Temperance

2010 is shaping up to be the year of Food Temperance – a landmark redefinition of what qualifies as "healthy" and how food claims and communications are regulated.

Significant food label reform is expected within the 2010-2015 timeframe, including government guidelines for uniform front-of-pack labeling, an overhaul of the Nutrition Facts panel, updates to the Daily Values, and tighter regulation on health and structure/function claims.

Within this environment, consumers are looking for real assistance in helping them make better choices at the grocery store. The majority of Americans believe it is their personal responsibility to make the right choices. However, grocery shoppers also seem to indicate that if the industry isn't able or willing, then they are happy to have the government step in and help.

So where does this leave food marketers and manufacturers? FoodMinds believes a window of opportunity has opened for strategic action.

It may no longer be sufficient for products to leverage "better-for-you" positioning. Industry must continue to innovate to maintain the taste, performance and acceptance of foods while improving nutritional value – striving for "best-for-you" status wherever possible. Nutritional content improvements should go beyond the removal of negatives to addressing the under-consumption of key whole food groups and nutrients.

As industry develops health-claim driven marketing programs to support improved foods, food companies must also consider the totality of the product. In the Food Temperance environment, claims and marketing support for foods must be designed to strike the balance between the nutritional strengths and liabilities of the product.

Consumers are Aware of the Issues

While food industry executives and communications specialists are closely monitoring this environment – what about the grocery shoppers? Are they following and do they care about government efforts to label their food options as “healthy” and “unhealthy?” In fact, two-thirds of primary grocery shoppers are not only aware, many have heard or read a lot about issues and actions related to food policy.

How much have you heard or read about:

The increasing numbers of Americans who are unhealthy because they are obese



Opinion Leader Shoppers



Primary Grocery Shoppers

Government re-evaluating levels of fat, sugar, salt and other nutrients that are considered healthy in foods and beverages



Opinion Leader Shoppers



Primary Grocery Shoppers

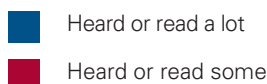
Government placing stricter rules on health and nutrition information on food packages and in advertising to children



Opinion Leader Shoppers



Primary Grocery Shoppers



Consumers Crave Information on Food Nutrients and Benefits

Consumers value on-pack nutrition labeling. Whether basic nutrient facts or higher-order health benefits, most consumers find this information to be at least somewhat useful. The strongest interest is in the basic Nutrition Facts panel and front-of-pack labels that call out positive nutrients such as fiber, and levels of fat and calories. Marketing-oriented claims are rated “somewhat useful” by more than two-thirds of primary grocery shoppers and opinion leader shoppers.

Rate the usefulness of information when judging the nutritional value of your food

Nutrition Facts panel that lists calories, nutrients



Opinion Leader Shoppers



Primary Grocery Shoppers

Information on front of package about nutrition - “low fat,” “high in fiber” or “reduced calories”



Opinion Leader Shoppers



Primary Grocery Shoppers

Organic, natural and sustainable, farming practices



Opinion Leader Shoppers



Primary Grocery Shoppers

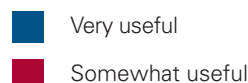
Claims on front of package about benefits - “helps you lose weight,” or “helps build strong bones”



Opinion Leader Shoppers



Primary Grocery Shoppers



Who Do Consumers Trust?

Americans reserve the greatest amount of trust for their friends and family and the government for health and nutrition information. Interestingly, opinion leader consumers show slightly higher trust levels in government agencies than all shoppers. First Lady Michelle Obama is an emerging voice in the world of nutrition, and she is well positioned to grow consumer trust as the figurative leader of the White House task force against childhood obesity.

How much do you trust the following sources to provide reliable and useful nutrition and health information?

Friends & Family



Opinion Leader Shoppers



Primary Grocery Shoppers

Government agencies like USDA, FDA & FTC



Opinion Leader Shoppers



Primary Grocery Shoppers

Michelle Obama



Opinion Leader Shoppers



Primary Grocery Shoppers

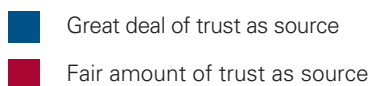
Special interest groups like CSPI & Michael Pollan



Opinion Leader Shoppers



Primary Grocery Shoppers



Interest in Front-of-Pack Information

When exposed to a front-of-pack symbol, such as the “traffic light” currently used in the U.K., 64 percent of consumers indicate they would either eat less of their favorite foods, or switch to a healthier option. Most shoppers (86%) are very or somewhat interested in labeling on the front of the package that conveys the amount of calories and the amount of beneficial nutrients (e.g., vitamin D or fiber) a food/beverage contains, while 77% are interested in one that helps them identify products with an “empty calories” symbol that shows the nutritional quality of the calories. A potential outcome from this Food Temperance movement is the possibility of the government establishing new standards for front-of-pack labeling and marketing.

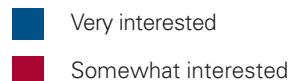
Indicate your interest in labeling on the front of package that conveys the amount of calories and the amount of beneficial nutrients (e.g., vitamin D or fiber) a food/beverage contains



Opinion Leader Shoppers



Primary Grocery Shoppers



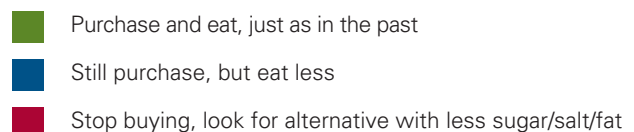
If you found this symbol on a favorite food, indicating higher than ideal levels of total fat, salt, and sugar, according to the governments new stricter standards, what would you do?



Opinion Leader Shoppers



Primary Grocery Shoppers

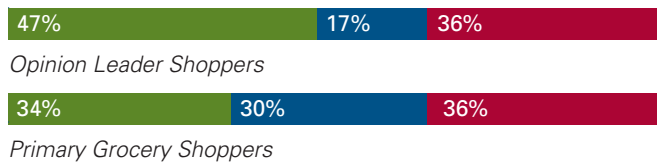


Consumers Support Government Action

The grocery shopping public, and in particular most opinion leaders, show support for a range of potential policy actions. These include more overt guidance on “healthy” and “unhealthy” foods in government nutrition education programs and a ban on marketing food to children that does not meet strict criteria for nutrient content. The only potential government act not favored by a majority of either opinion leader or primary grocery shoppers is the taxation of foods high in sugar and calories but low in nutritional value.

Additionally, after reacting to each of the individual areas of intervention respondents were asked about their overall approval and disapproval of increased government involvement in food choices. Nearly half of opinion leader shoppers support increased government activity and intervention to limit the consumption of unhealthy foods. Primary grocery shoppers are less convinced, although one-third, a significant minority, do support increased government actions.

Thinking about increased level of government involvement in our food choices, limiting consumption of unhealthy foods, do you approve or disapprove of these actions?



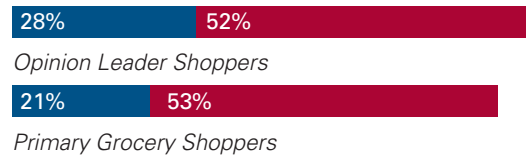
- Approve
- Unsure
- Disapprove

FoodMinds is a food and nutrition company, serving as a trusted partner to its clients in producing novel food and nutrition positions and programs that shape the future. FoodMinds applies knowledge, critical thinking and connections in food and nutrition to create ideas, strategies and programs to help its clients tell better stories that make a difference.

For more information on the Food Temperance Survey and its implications for your organization, please contact Grant Prentice at gprentice@foodminds.com.

Do you favor or oppose these government actions to help people avoid the consumption of unhealthy foods?

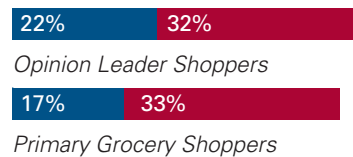
Government nutrition education programs more overtly identify bad foods



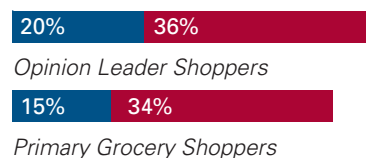
Ban advertising to children for foods that don't meet new, stricter requirements for calories, sugar, fat and salt



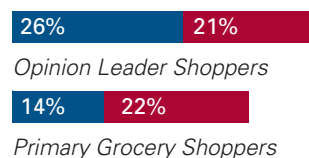
Allow employers, through financial rewards and insurance discounts, to reward the healthy while punishing those engaging in unhealthy behaviors



Create new laws that prevent food companies from making health claims



Tax soft drinks and foods high in sugar and calories, but low in beneficial nutrients



- Strongly favor
- Favor