



UNDERSTANDING THE  
CHALLENGES AND MOTIVATIONS

MOVING CONSUMERS FROM  
KNOWLEDGE TO ACTION!

NAVIGATING THE CHANGING FOOD, AGRICULTURE AND CONSUMER LANDSCAPES.

# DISCLOSURES

- Founder/Principal, The AgriNutrition Edge
- Former Sr VP, International Food Information Council Foundation
- Senior Associate, The Context Network

# OBJECTIVES

Today we will be able to:

- Understand the value of consumer insights in developing audience specific communications for motivation of behavior change
- Identify the key determinants that motivate consumers to make food and nutrition decisions
- Apply consumer understanding to communicating healthful recommendations in “real world” settings.

# Through the Lens of Consumer Insights

- International Food Information Council Foundation Annual Food & Health Survey
- NPD Eating Trends
- Center for Food Integrity 2016 Consumer Trust Research
- Food Marketing Institute (FMI) U.S. Grocery Shopper Trends 2016
- Rodale/FMI Shopping for Health

# Why Consumer Research?

*If we are to improve the health of individuals and the population overall, we must understand the factors that determine individual behaviors in a complex world and understand how behaviors, and the attitudes and beliefs that shape them, change over time.*

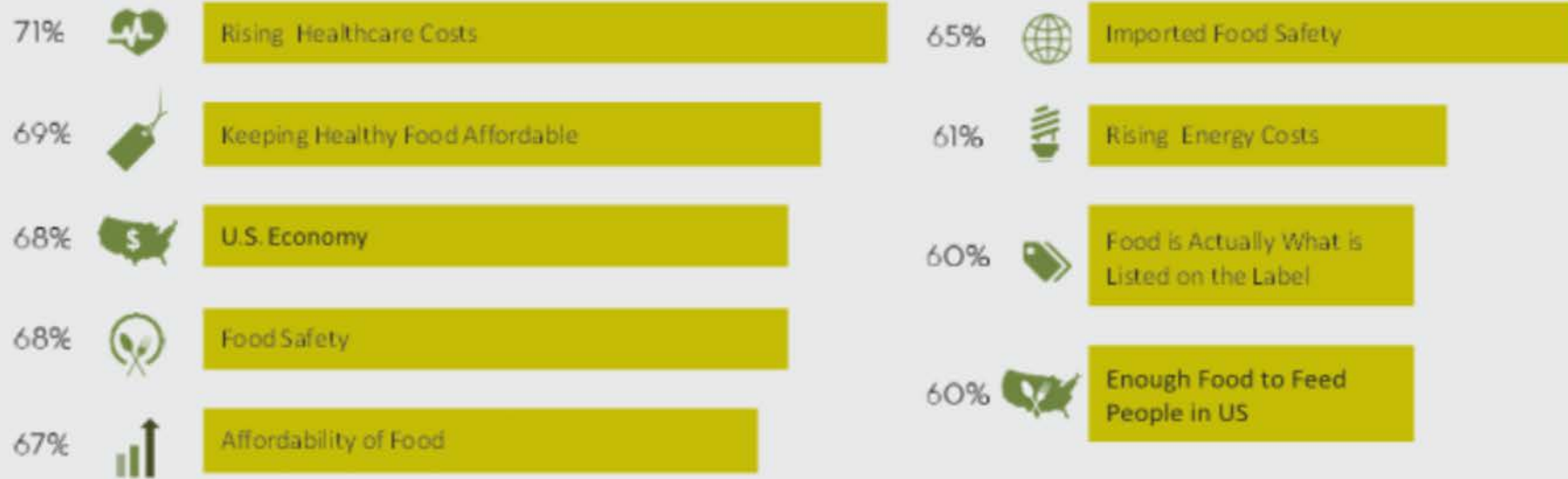




# SEEK FIRST TO UNDERSTAND THE LANDSCAPE

# FOOD SYSTEM RELATED LIFE ISSUES ARE TOP OF MIND FOR TODAY'S CONSUMERS

About TWO out of THREE express concern for:



# FOOD CONVERSATION DRIVERS



- **The Boomers (55+ yrs.)** - Health and Food are closely entwined with health as medical issues increase.
- **Millennials (25-34 yrs.)**- Food is top of mind with focus on sustainability, economics, authenticity. Two distinct groups within- pre and post kid groups.
- **“New Moms” (0-4 yrs.)** “Momma bear” mindset of “my child is perfect and I want the best food.”



# FOOD CONVERSATION INFLUENCERS



## Peak Performers

- 25-44 years of age
- Professional jobs, business owners, consultants
- Single, upper/upper middle class with higher education
- Skew 60% male, believe they control their own fate
- Fears aging and being obese
- Food is critical for looking good- an opportunity for self-improvement

# FOOD CONVERSATION LISTENERS



## Providers

- Wide age range, more suburban and rural areas
- Moderately educated, many didn't attend college
- Blue and white collar professionals juggling home and work life
- Children in the household
- Live a life of regret, guilty of not meeting expectations of those around them
- Food is fuel, not top of mind-unless they're not meeting a need

concerned about my health in general

61%

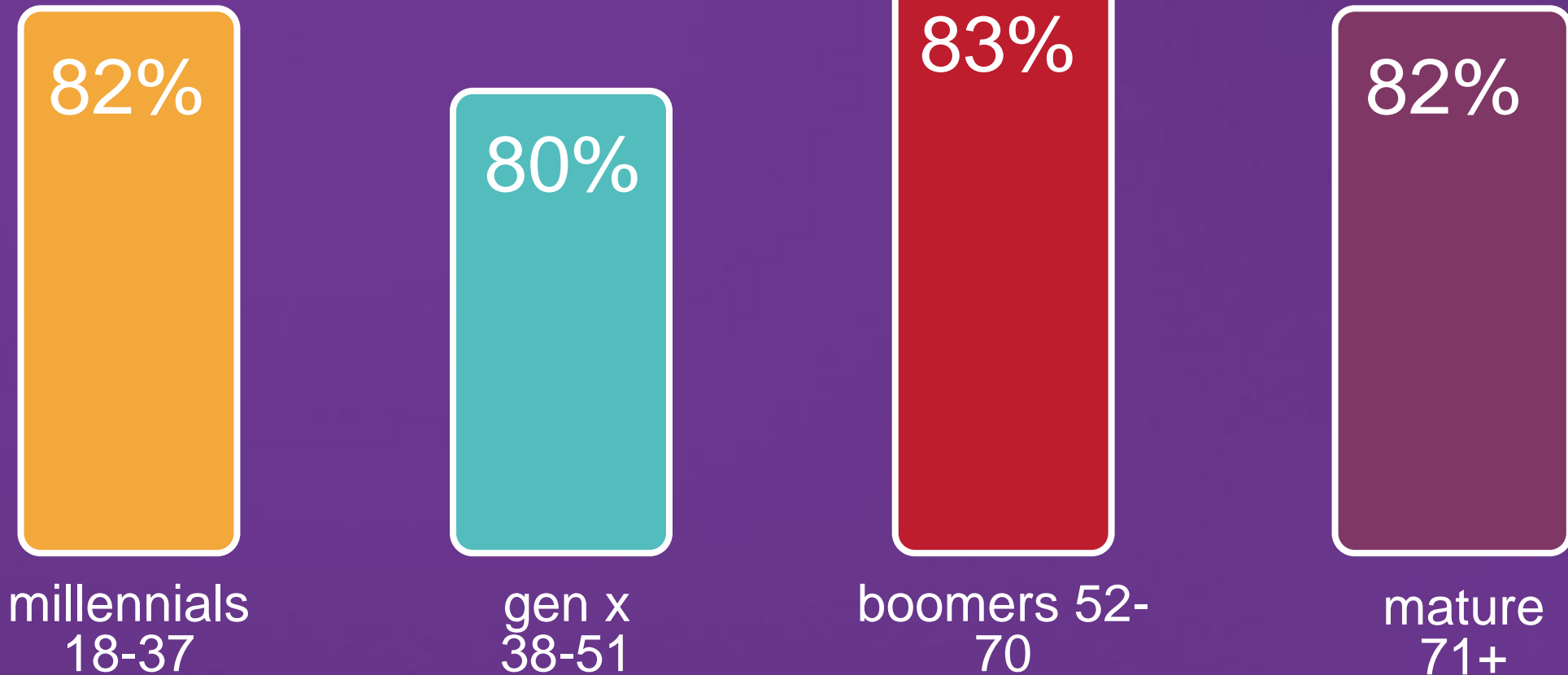
food I eat has too much of something I need to avoid

44%

my foods are not sufficiently nutritious

22%

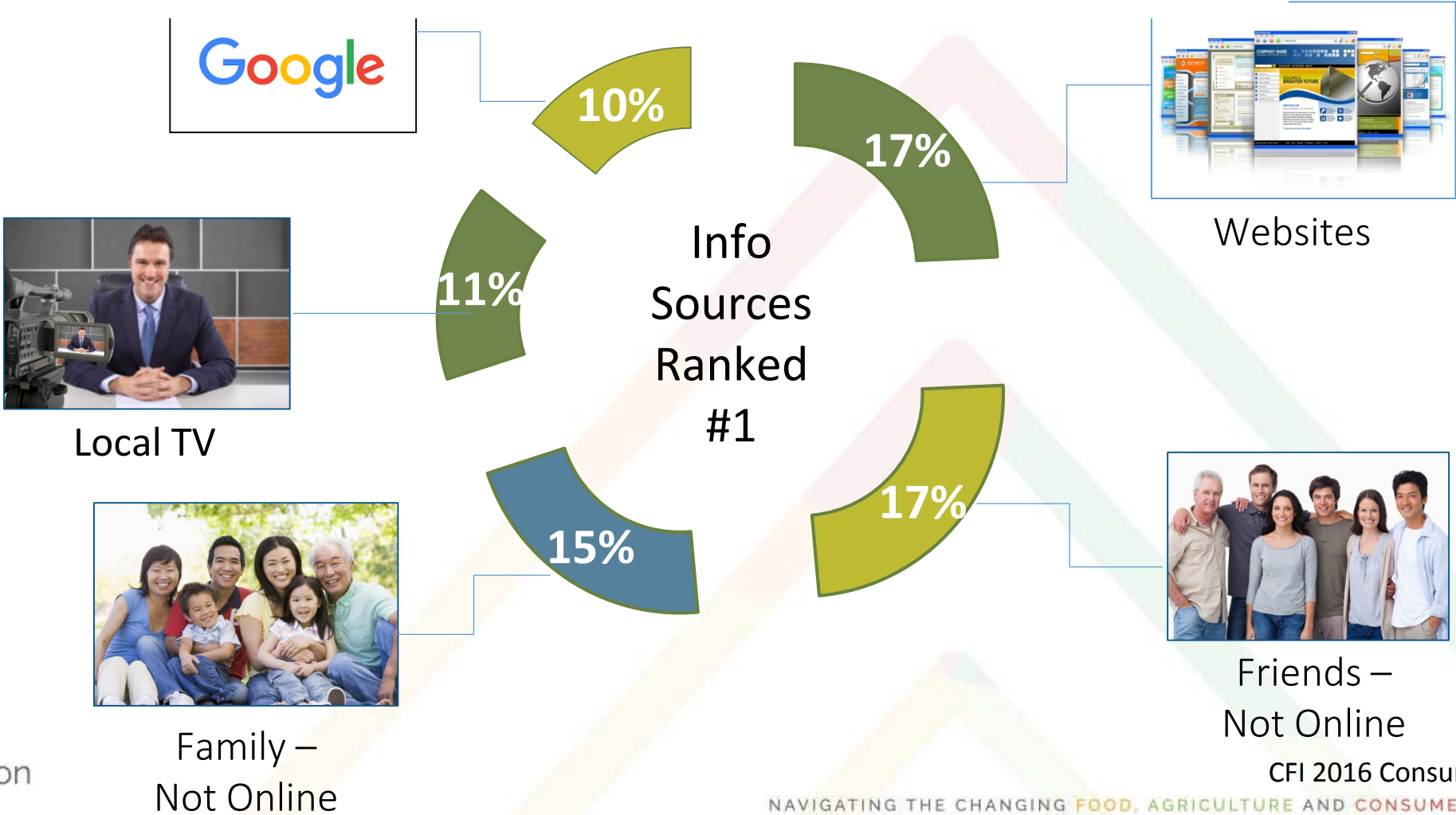
# somewhat/very concerned about the nutritional content of food they consume



Source: FMI U.S. Grocery Shopper Trends, 2016



# #1 Source of Information About the Food System are Diverse



# Top Source for Information

## Moms

Web Sites (21%)  
Friends-Not Online (15%)  
Family-Not Online (15%)  
Google (9%)  
Friends-Online (9%)

## Foodies

Friends-Not Online (22%)  
Web Sites (19%)  
Family-Not Online (13%)  
Friends Online (11%)  
Google (10%)

## Millennials

Friends-Not Online (20%)  
Web Sites (16%)  
Google (14%)  
Family-Not Online (12%)  
Friends Online – Social (8%)

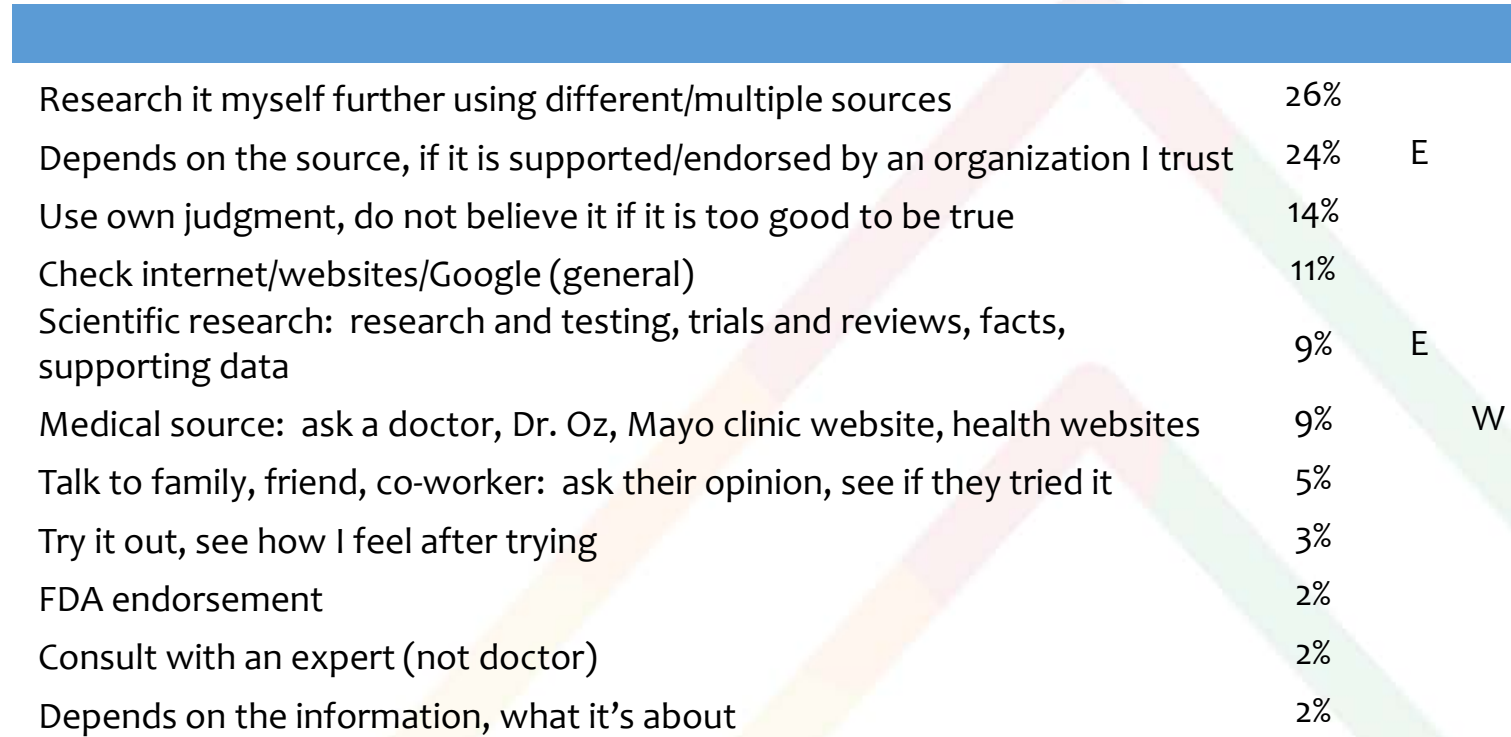
## Peak Performers

Web Sites (20%)  
Google (17%)  
Food Specific TV (15%)  
Friends-Not Online (14%)

# One in four consumers verify new food/health information before trusting it and their trust depends on the source of the information.

*If you read or heard new information about food and health, how would you decide whether or not to believe it?  
(Top Responses)*

All (n=1,057)

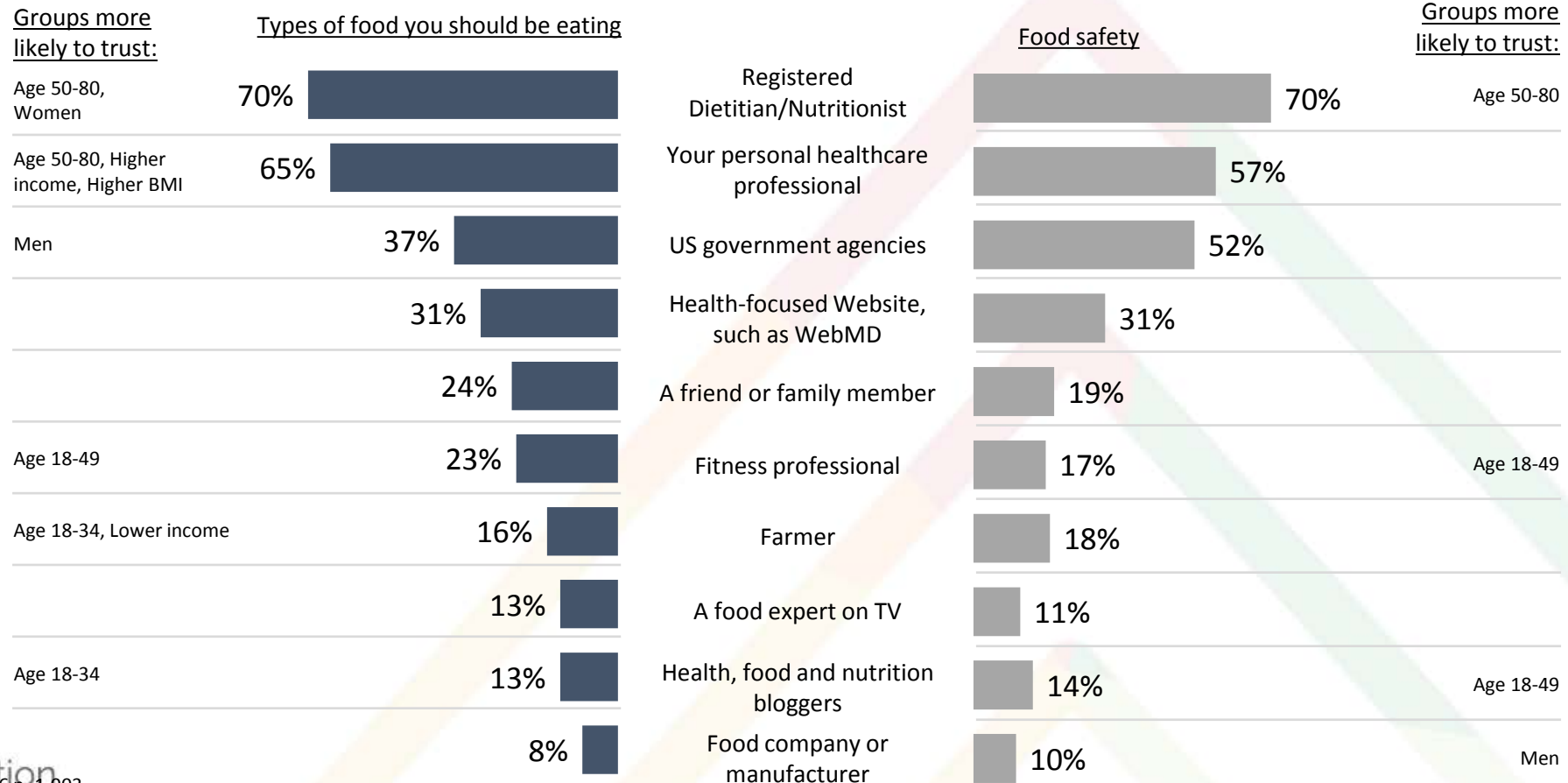


**E** Highly **educated** consumers (college grads) are more likely than others to say it depends on the source or to believe scientific research.

**W** **Women** are more likely than men to trust medical sources.

# Registered Dietitian, Personal healthcare professional and US government agencies are the top three most trusted sources for types of food eaten and food safety.

Which one of these sources would you *trust the most* to provide accurate information about the following issues? (Select up to 3.)



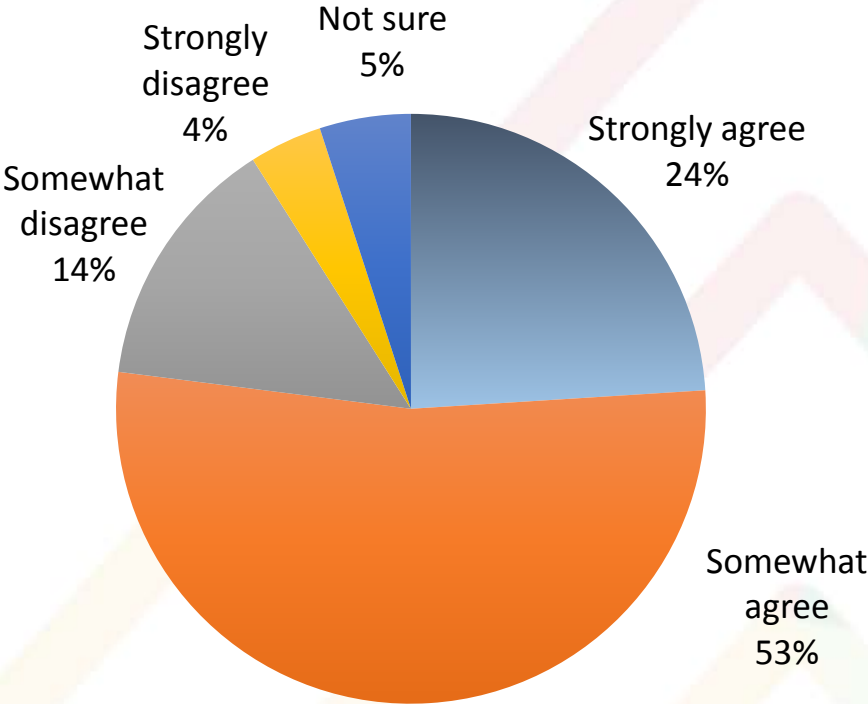


# Majority of consumers feel changes in nutritional guidance makes it hard to know what to believe.

Obese consumers (BMI 30+), older consumers (65-80), and women are all more likely than their counterparts to believe that changing information makes it hard to know what to believe.

*To what extent do you agree or disagree with the following statement?  
Because nutrition information seems to keep changing, it's hard to know what to believe.*

All (n=1,057)



**76% strongly or somewhat agree that changing information makes it hard to know what to believe.**



# SEEK FIRST TO UNDERSTAND THE REALITY

# People typically describe their general health as good to excellent.

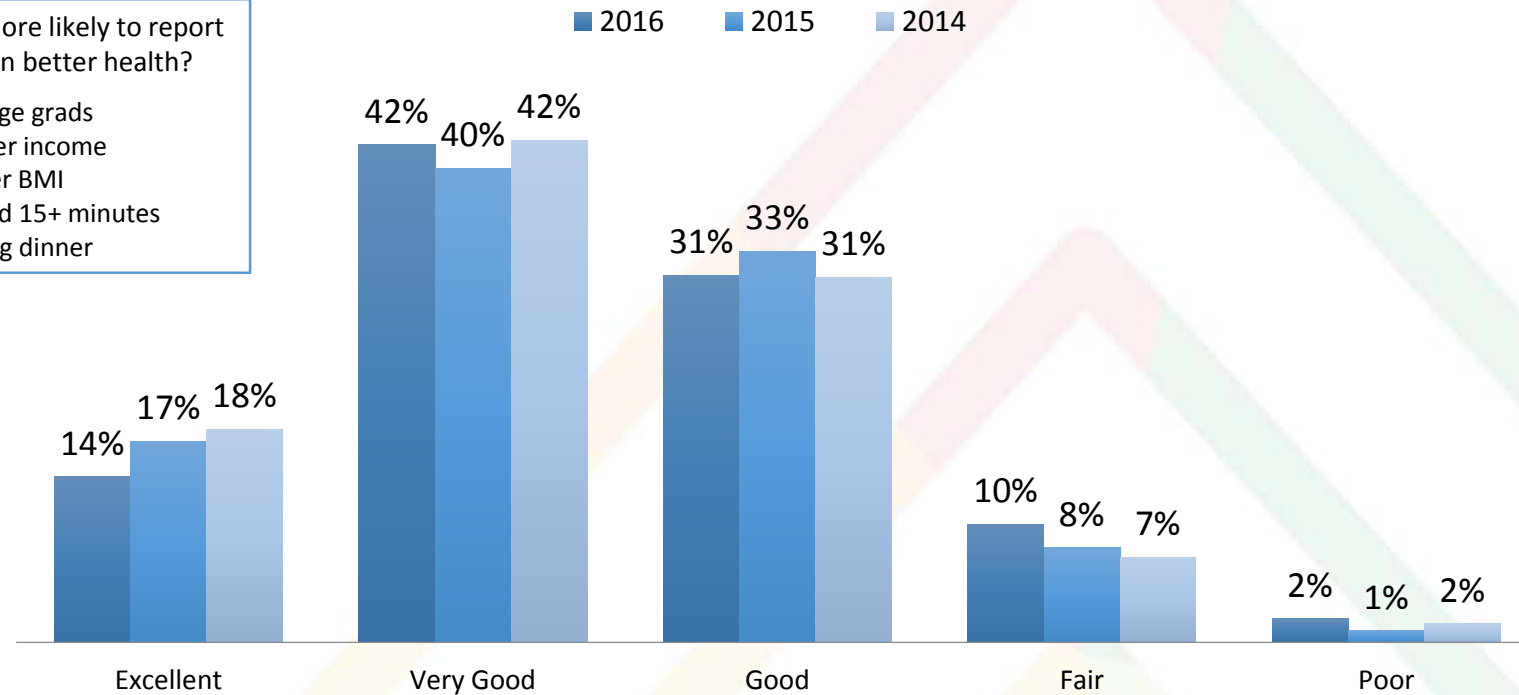
How would you describe your own health, in general?

## 57%

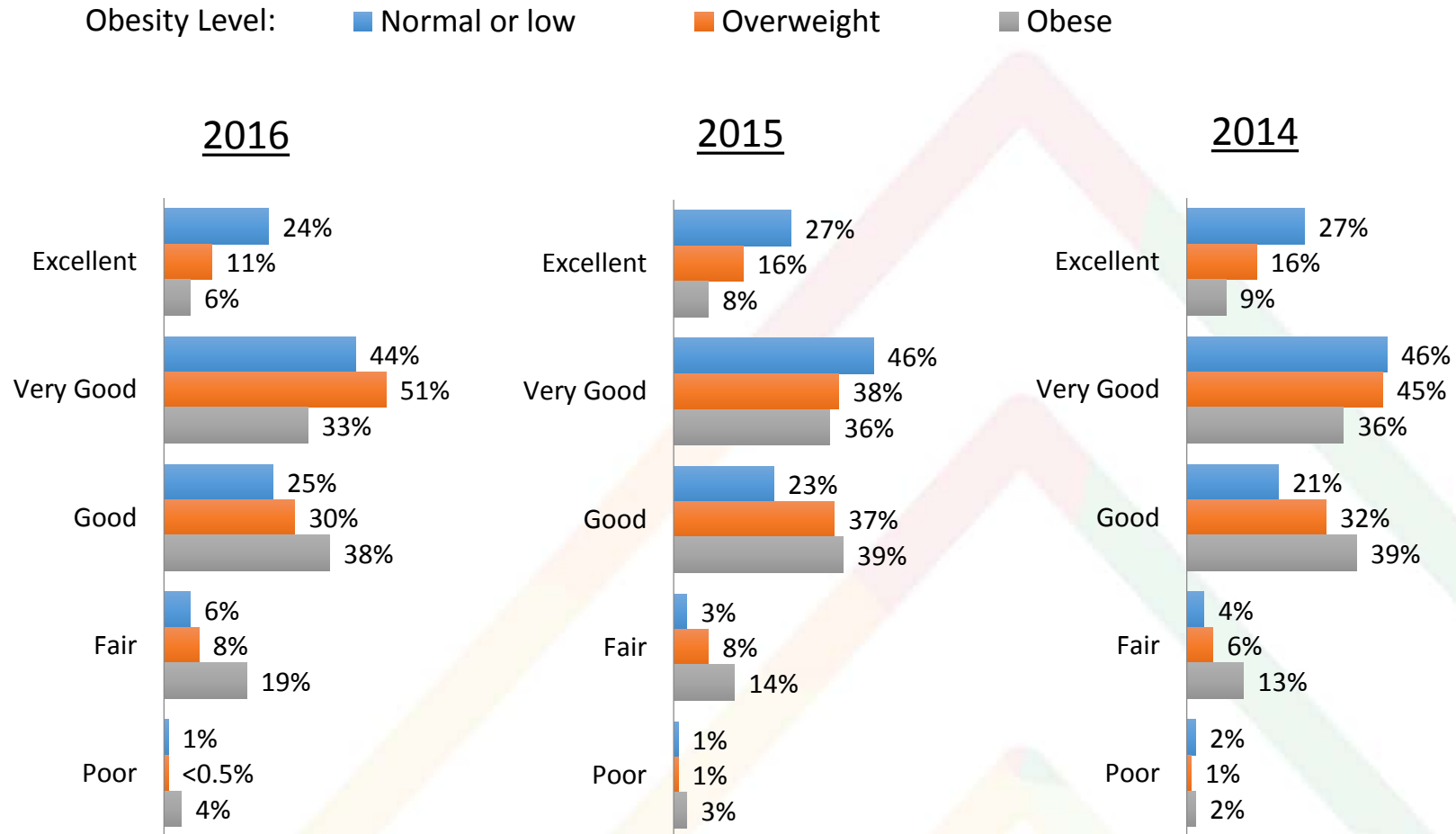
ARE IN EXCELLENT/VERY GOOD HEALTH

Who is more likely to report being in better health?

- College grads
- Higher income
- Lower BMI
- Spend 15+ minutes eating dinner



# BMI and health status are related but not necessarily in the minds of overweight consumers.



2016 n=1,003, 2015 n=1,007; 2014 n=1,005



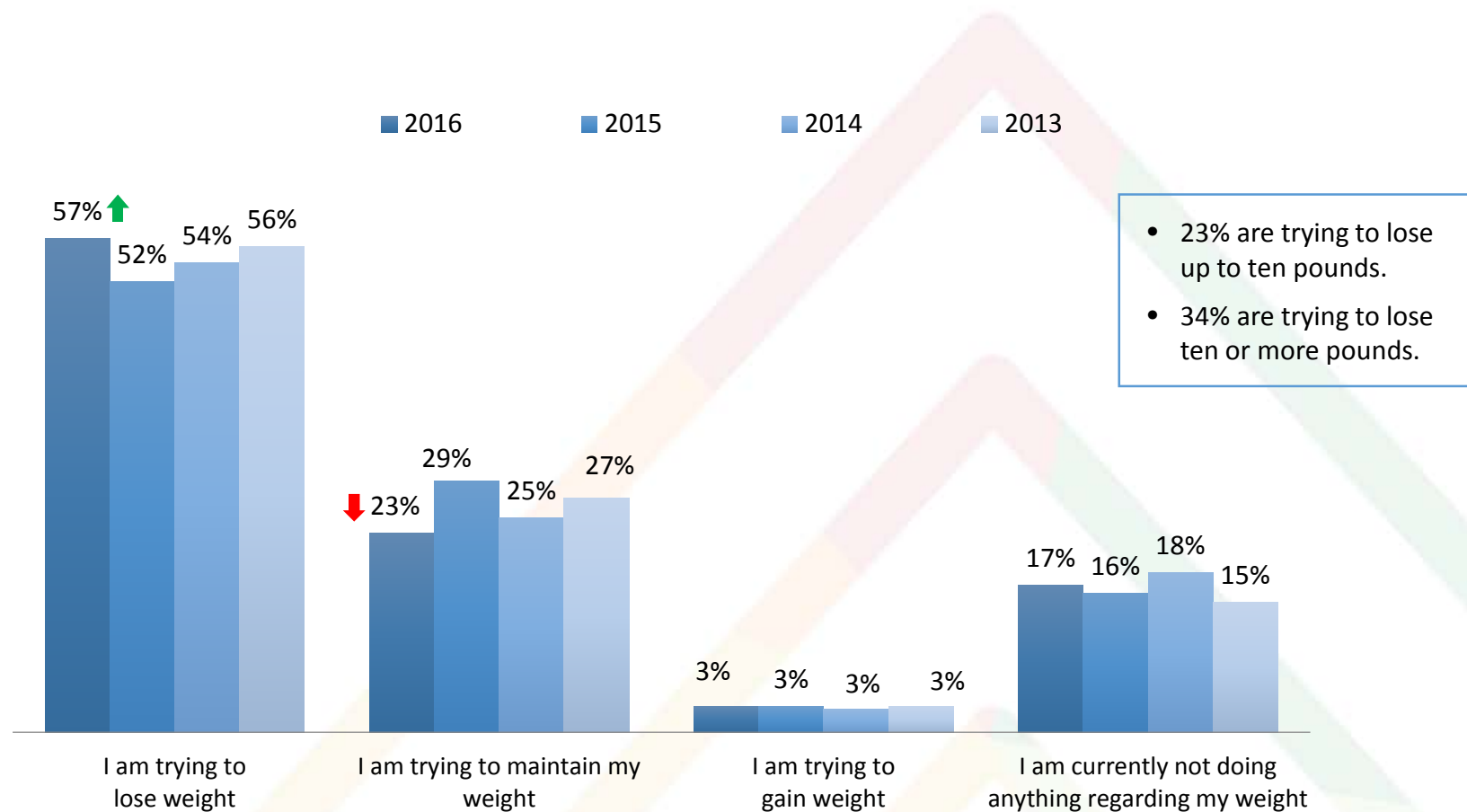
# Weight Status –FMI Insights

- + **51%** feel they are overweight
- + But only **28%** are actively trying to lose it
- + In denial—some might not realize they are overweight
- + Obstacles include: hunger impulses, motivation, and not wanting to give up their favorite foods



# Majority are still trying to lose weight with a third trying to lose ten pounds or more.

Which of the following best describes what you are currently doing regarding your weight?



# Strategies Consumers Believe Work

+ When it comes to achieving and maintaining healthy weight:

**75%** believe eating healthy food is more important than counting calories

**34%** don't count calories at all

**49%** simply try not to consume too many at once







U.S. GROCERY SHOPPER

# TRENDS 2016



confident in food supply



Source: FMI U.S. Grocery Shopper Trends, 2016





Does it fit my  
health  
needs?



Does it  
sustain my  
health?



Am I being  
socially  
responsible?







**RODALE**

# SHOPPING FOR HEALTH

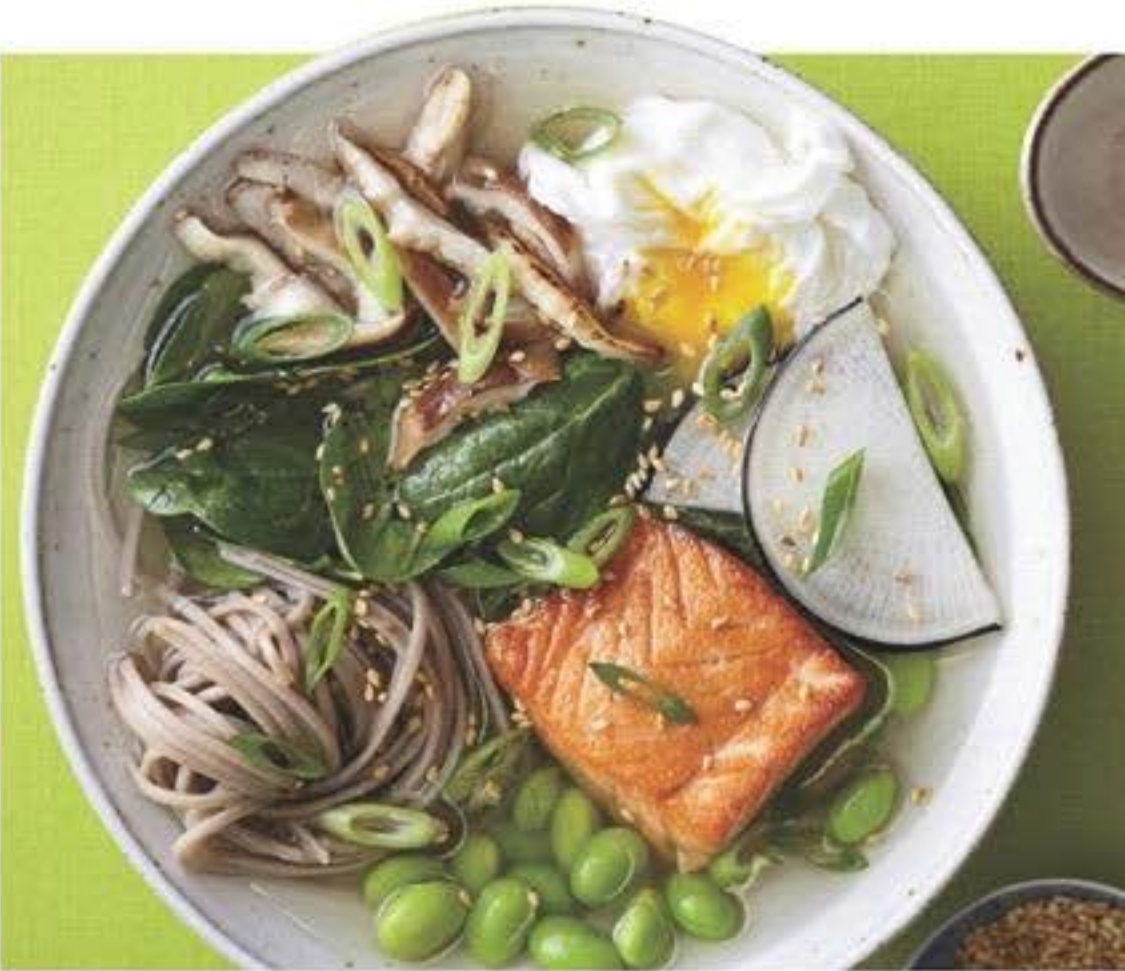


THE VOICE OF FOOD RETAIL 



# FOOD AS MEDICINE

- + **2 in 3** shoppers agree that food choices affect their health
- + **62%** view food as medicine
- + **67%** try to buy foods with health benefits, such as functional foods
- + **3 in 4** shoppers have switched to a healthier version of at least 1 type of food—yogurt, milk, bread



# FOOD WITH BENEFITS

- + **76%** of shoppers would like their food to help with **heart health**
- + **73%** want more **energy**
- + **70%** want **digestive** health
- + Which is the same for **mind** health
- + **39%** of shoppers buy **gluten-free** —some think it's healthier





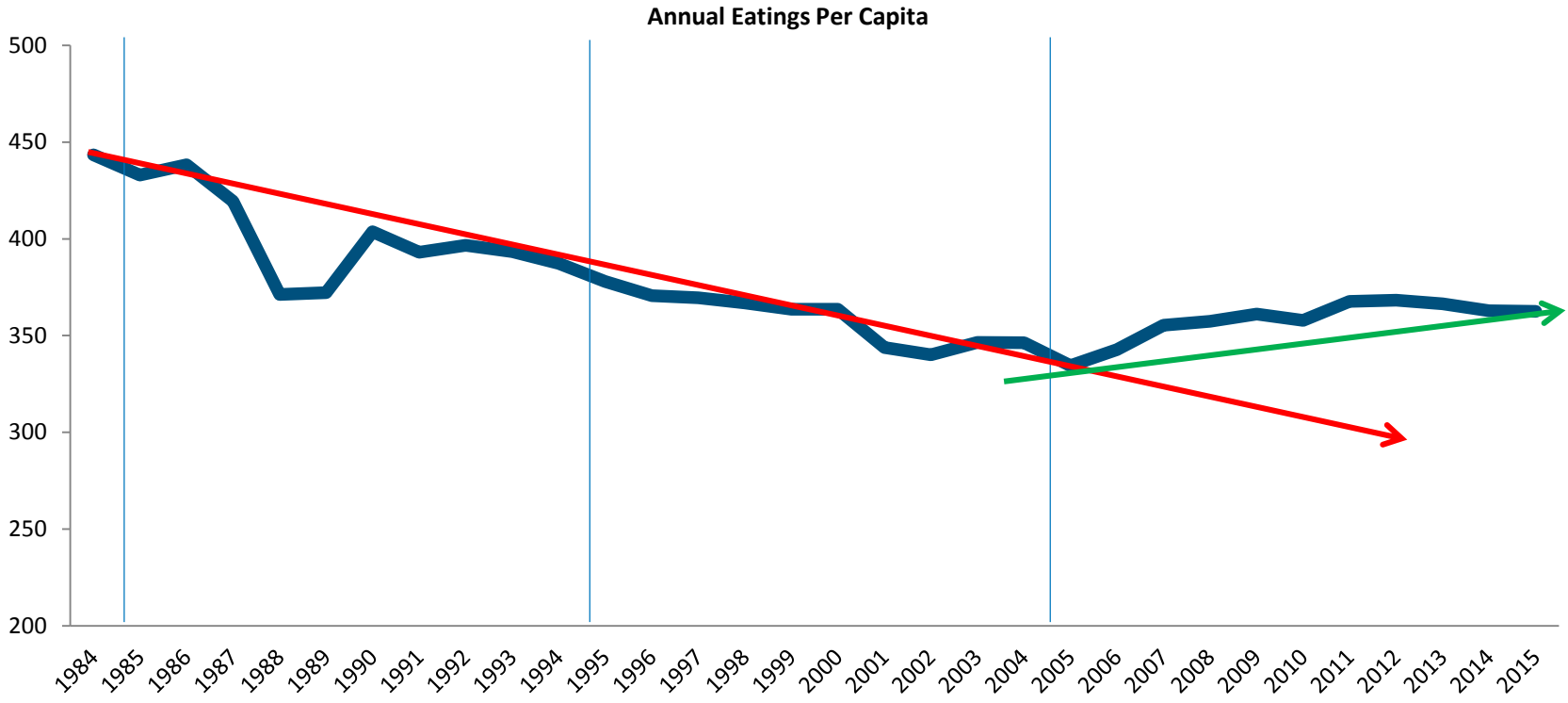
# SHOPPERS ARE BUYING MORE...

% compared to last year:





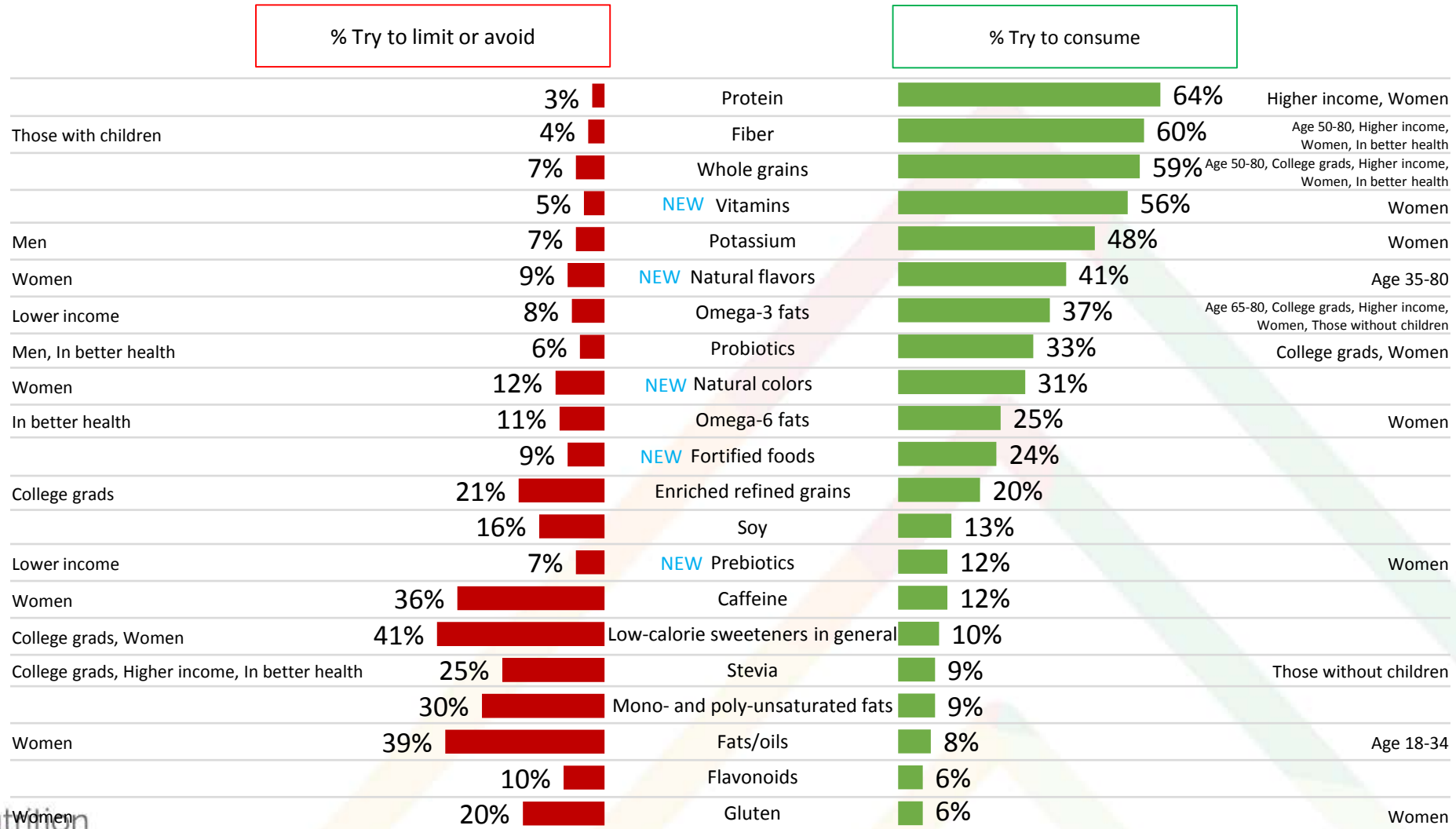
# Health & wellness: Fresh Trends



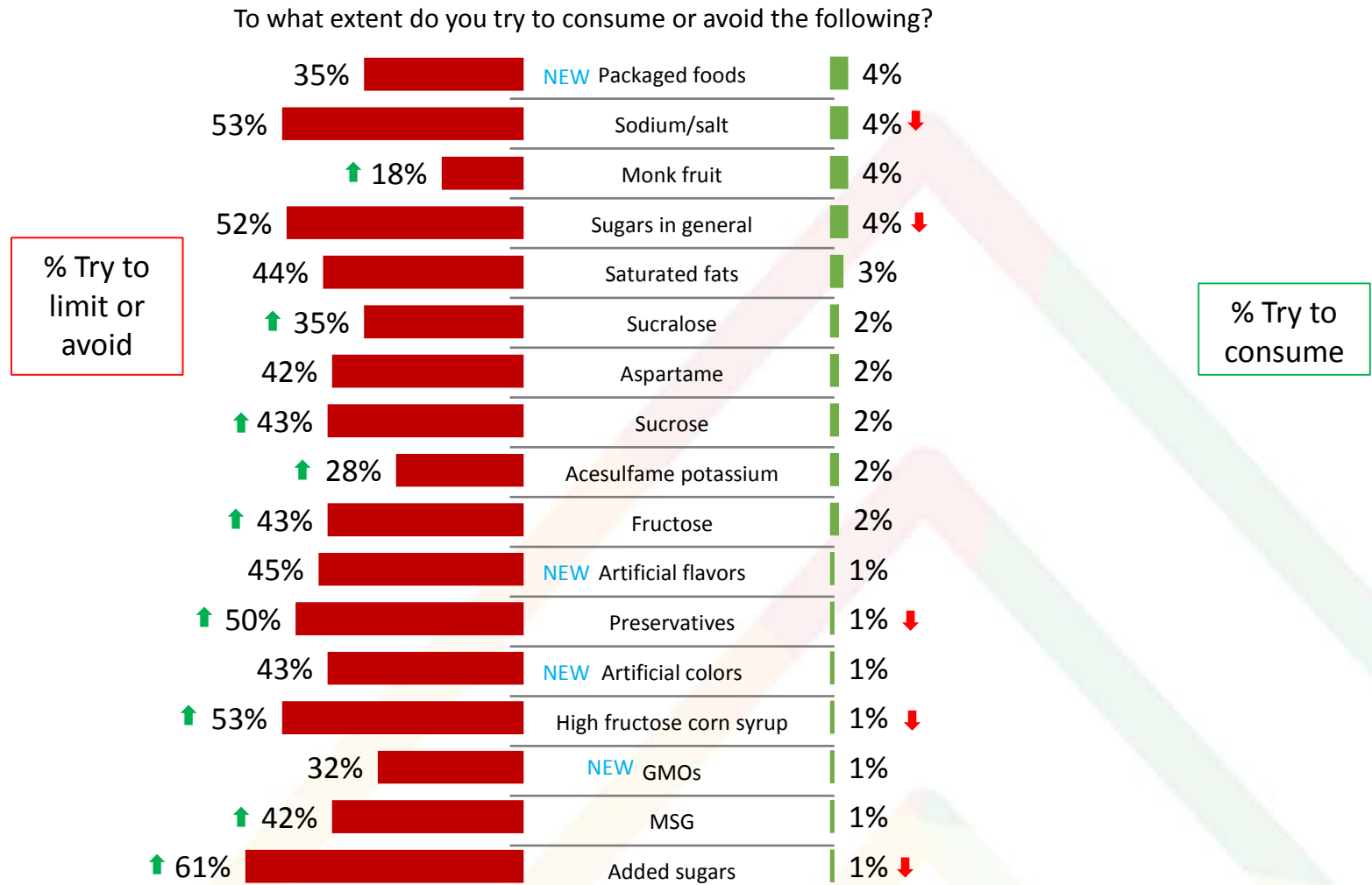
Source: The NPD Group/National Eating Trends®, yr end Feb  
 Fresh Food defined as fresh fruit, vegetables, refrigerated meats and eggs

# Subgroups more likely to take action on components

To what extent do you try to consume or avoid the following?



Consumers are also trying to limit or avoid more components in 2016, such as added sugars, high fructose corn syrup, and preservatives.

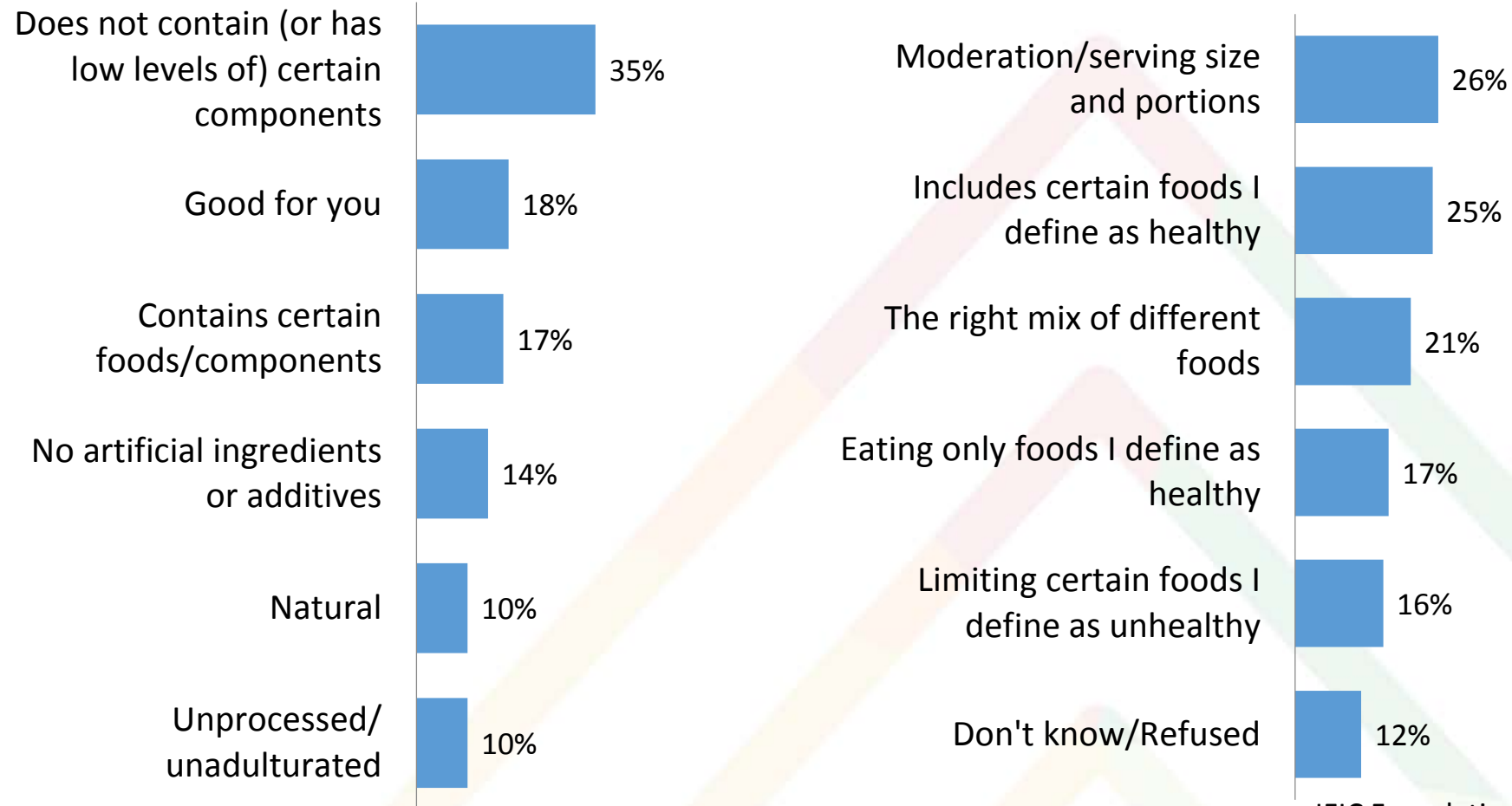


# THE DISCONNECT...

- + Shoppers have good intentions
- + BUT only 1 in 3 put in “a lot of effort” into healthy eating
- + This suggests a big disconnect between intention and action



# “Healthy “ vs Healthful Eating Styles



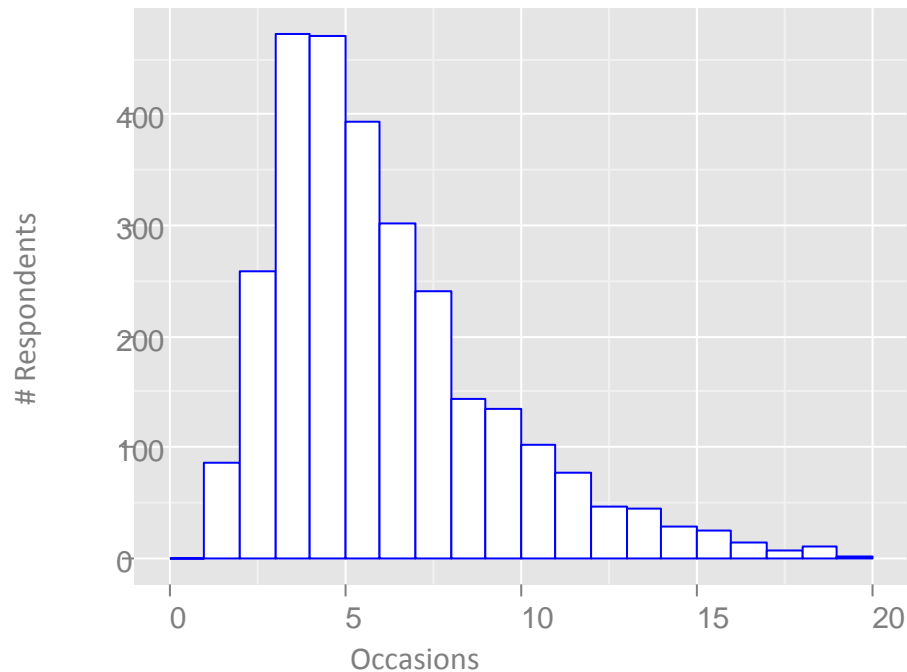
IFIC Foundation Food & Health Survey



# Typical adult consumes 5 times a day, but patterns are quite variable

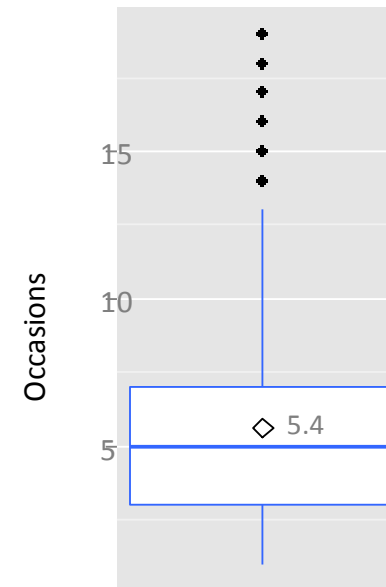
## Number of Consumption Occasions

# of respondents by frequency



N=2,856

## 50% of people consume 3 to 7 times a day



The rectangle represents the middle half of the data; it goes from the 25th percentile to the 75th percentile.

The solid line in the rectangles is the **median**.

Diamond symbol represents the **mean**.

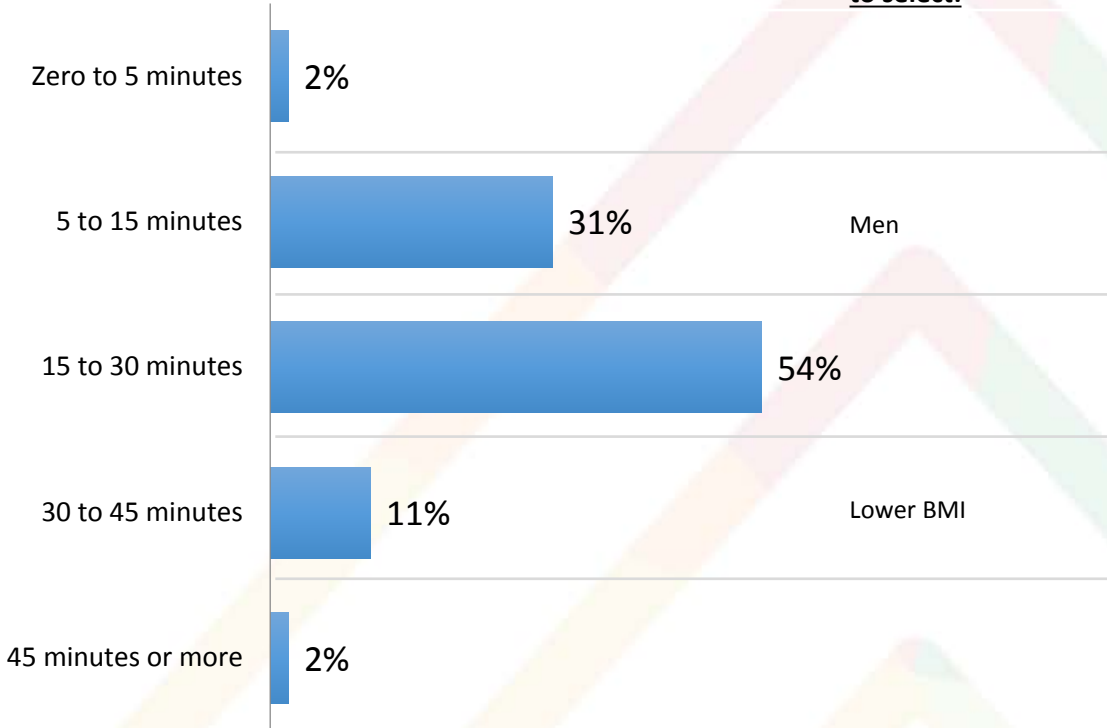
N=2,856

# A third of Americans spend less than 15 minutes eating dinner on an average weekday.

On an average weekday, how much time do you personally spend **eating** dinner?

**33%**  
LESS THAN 15 MINUTES

**65%**  
15-44 MINUTES



**Groups more likely to select:**

Men

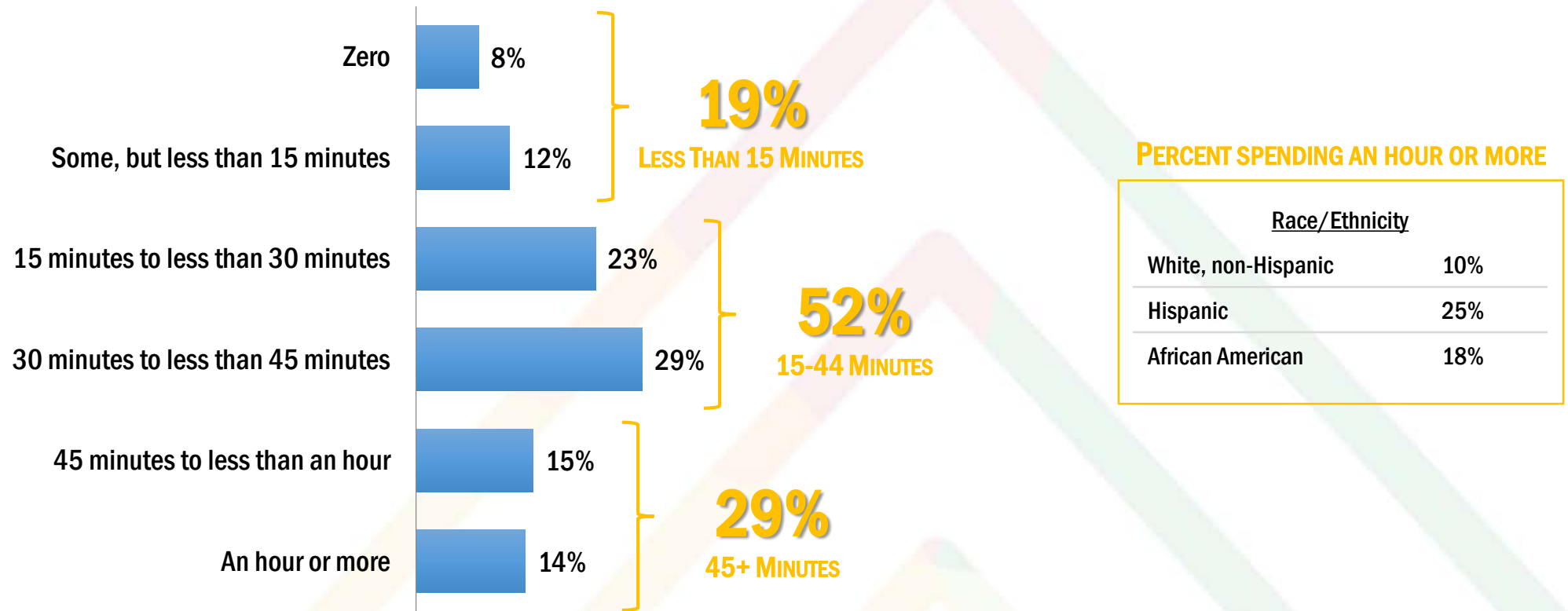
Lower BMI

**PERCENT SPENDING 15 MINUTES OR LESS**

Less than college	35%
College grads	27%
Men	37%
Women	29%
Excellent/very good health	29%
Good health	36%
Fair/poor health	41%

One in five Americans spends less than 15 minutes cooking or preparing dinner on the average weekday.

How much time do you personally spend cooking or preparing dinner on the average weekday?



# Consumption Behavior Insights

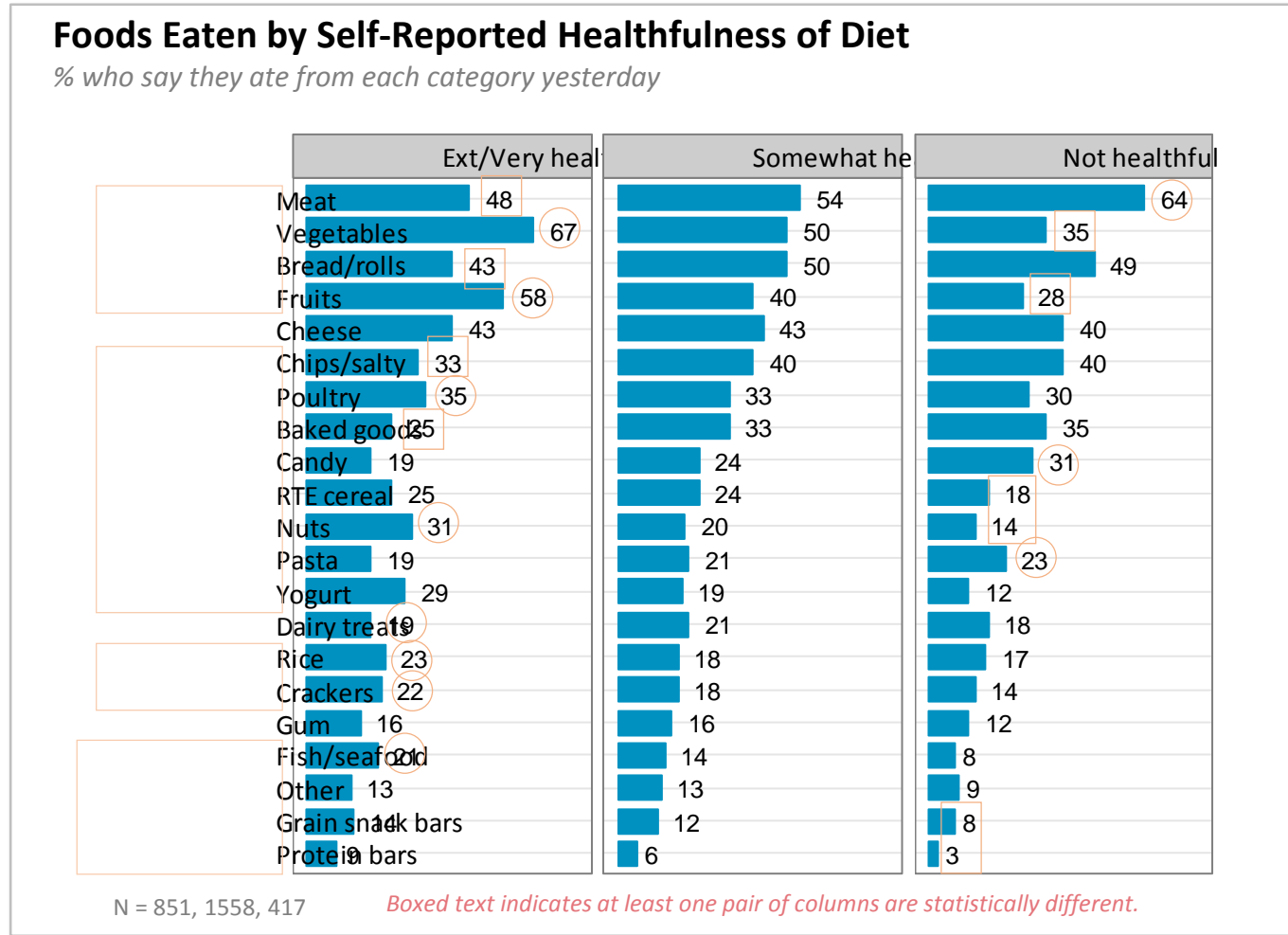
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- Most Americans' eating habits are not consistent with the Dietary Guidelines for Americans. For example, on a given day just over half of all adults eat a vegetable and a still smaller group eats fruit.
- Three in ten adults consider themselves to have a very healthful diet and self-assessments of diet corresponds with types of foods/beverages recorded and the motivation behind food/beverage choices reported.
- Those who consider their diet unhealthful are twice as likely to be obese than those who describe their diet as very or extremely healthful.
- Recognizing that one is overweight and has a poor diet does not necessarily add up to a recognition of overeating. On 80% of eating occasions and 86% of beverage occasions adults say that they “ate/drank the right amount.”

# Differences in foods consumed are numerous and often substantial when examined by diet healthfulness

Only three categories did not show variation by healthfulness of diet.

Huge differences registered on fruits and vegetables.



Circle identifies a value statistically higher than all others in row; box signifies a value lower than all others in row.



# Consumption Behavior Insights

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- Older Americans eat better than younger Americans. Younger Americans eat the least vegetables/fruit; more restaurant carry-out food and prepare fewer meals at home.
- Restaurant consumption habits appear to be negatively correlated with consumption of fruits and vegetables.
- Consumption of sugared beverages, regular soft drinks and juice drinks also correlate with lower fruit and vegetable consumption.
- Being more thoughtful about the amount one consumes and planning consumption occasions leads to healthier choices. Behaviors more common among healthy weight compared to obese persons.

# Consumption Behavior Insights

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## \$75k+ Income Group

These consumers have healthier diets than the lower income groups:

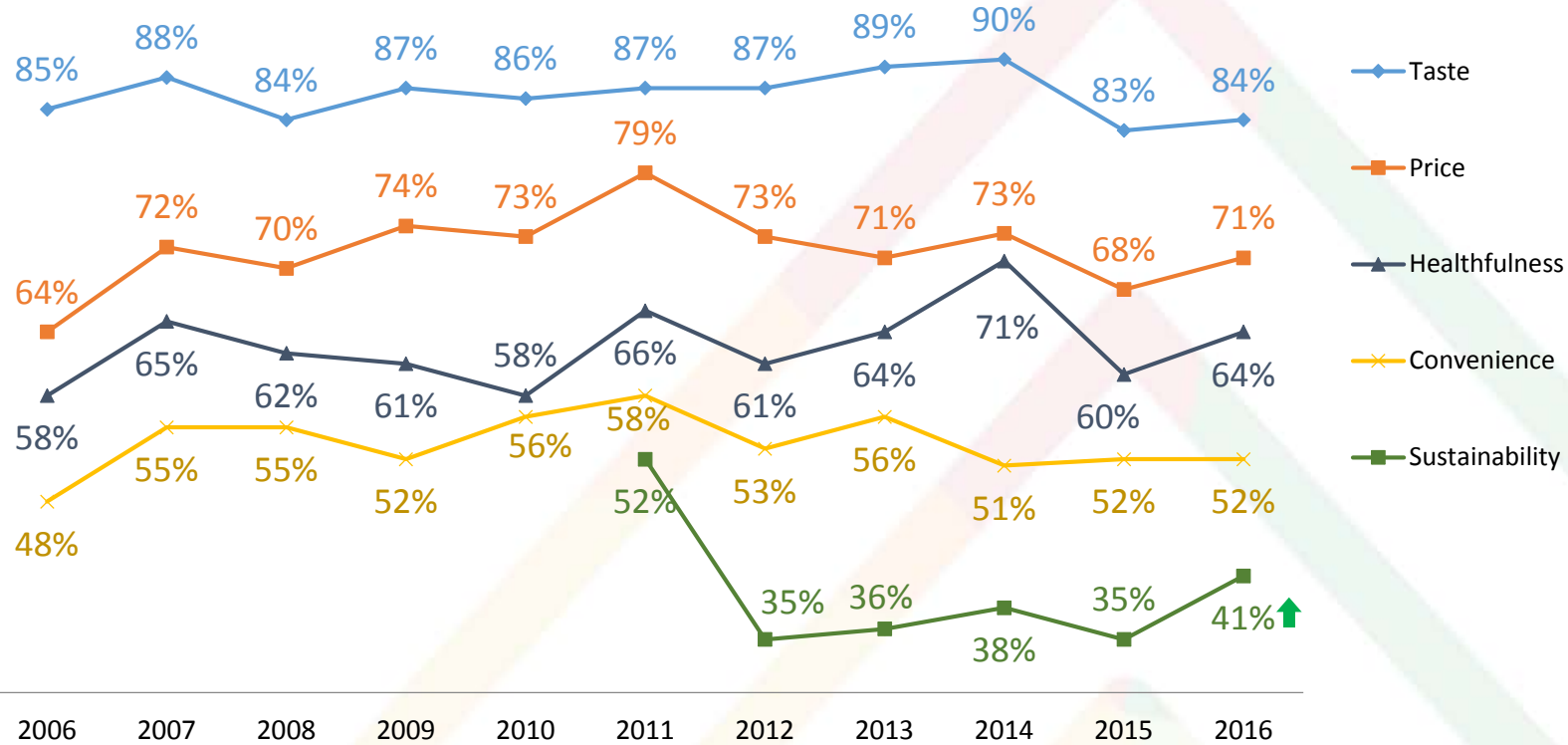
- the higher the income level the more vegetables and fruit eaten on a typical day.
- Fifty percent more fish and more nuts, yogurt and poultry are eaten than the lowest income group.
- Most likely to have planned meal occasion.
- Triggers for consumption: time/habit more than the other groups, nutritional needs and taste.



# SEEK FIRST TO UNDERSTAND THE MOTIVATIONS

# Taste is still #1 for making the decision to buy foods and beverages but sustainability is rising.

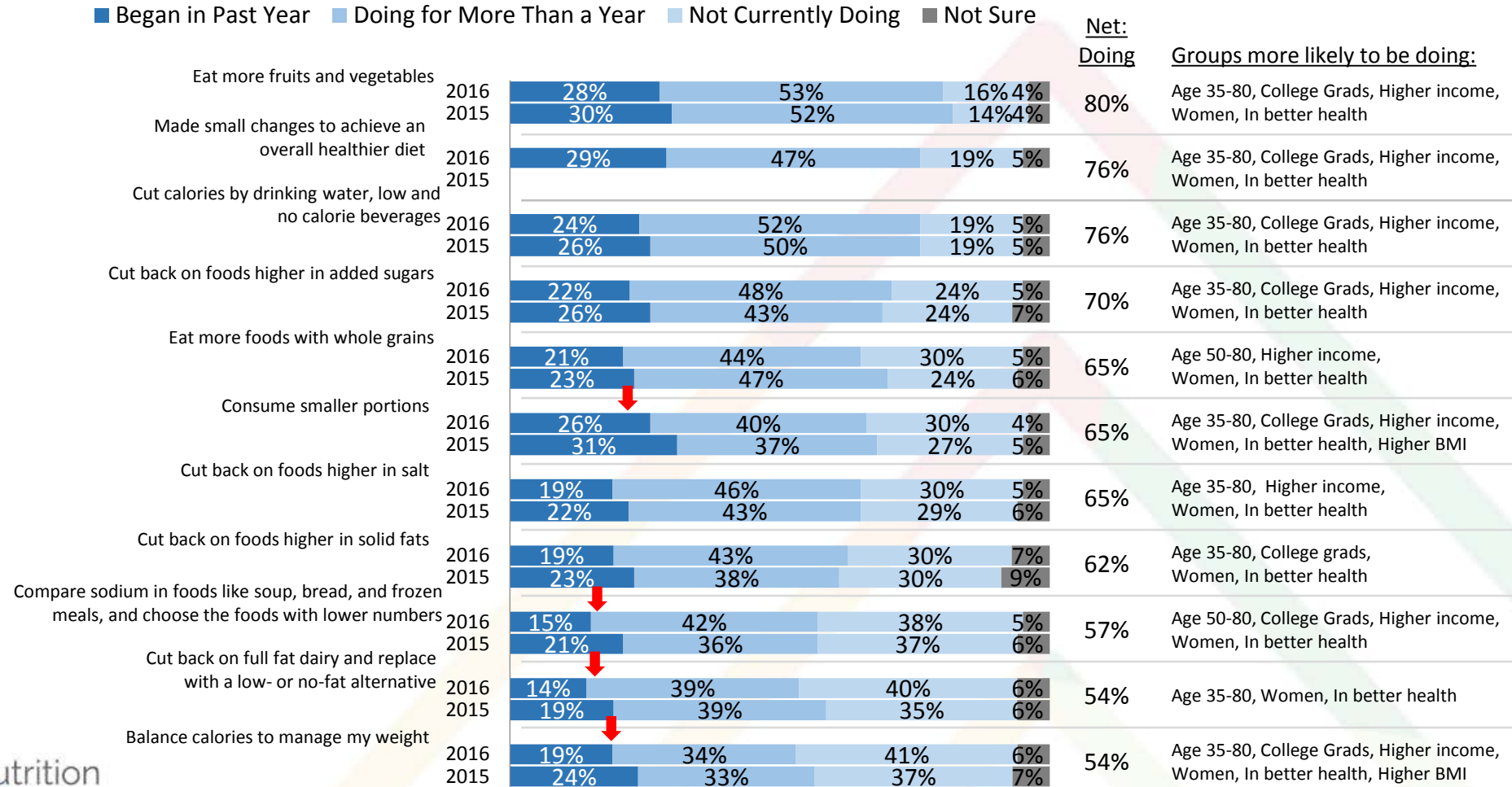
How much of an impact do the following have on your decision to buy foods and beverages?  
 (% Rating 4 to 5 on 5-point scale, from No Impact to A Great Impact)





# One-quarter have changed their diet in the past year; small changes such as eating more fruits and vegetables, and cutting calories by drinking water.

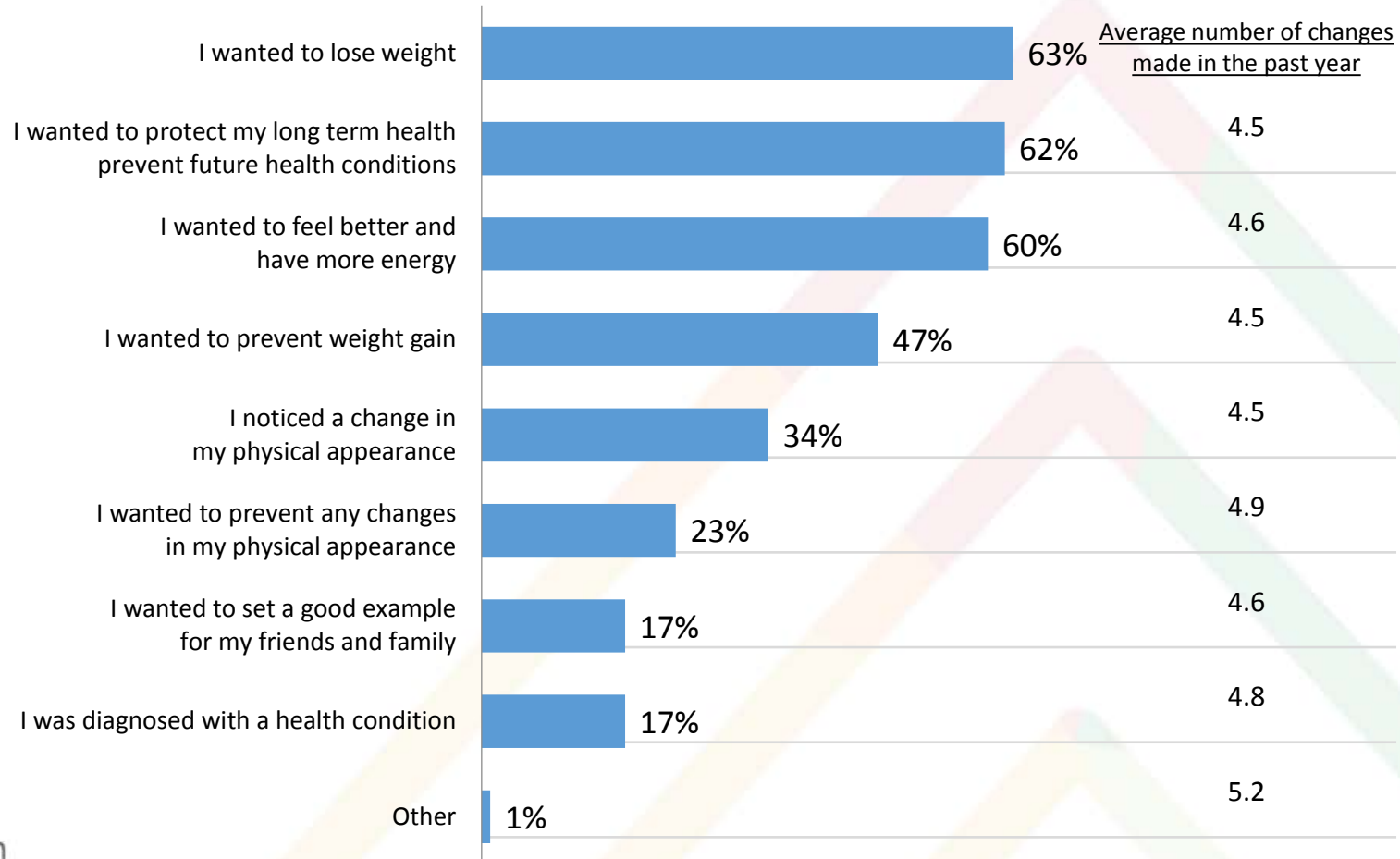
Over the past year, which of the following, if any, have you made an effort to do?



2016 n=1,003; 2015 n=1,007; Arrows indicate significant (.95 level) differences vs. 2015.

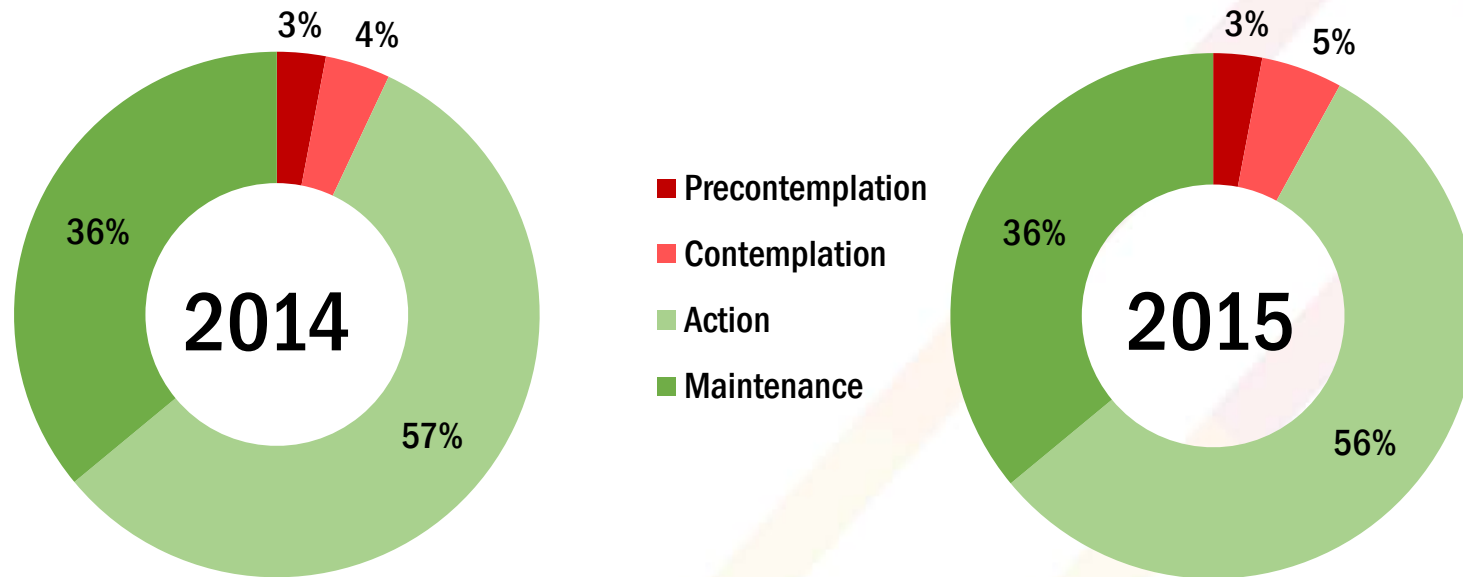
# People are most often motivated to change their eating habits to lose weight, protect their long term health, or to feel better and have more energy.

Which of the following motivated you to make an effort to change your eating habits? *(Select all that apply.)*



Consistent with 2014, more than half of Americans are in the 'Action' stage, having made at least one change to improve their diet in the past year. A third are in the 'Maintenance' stage, having maintained a diet change for more than a year.

## Behavioral Change Categories

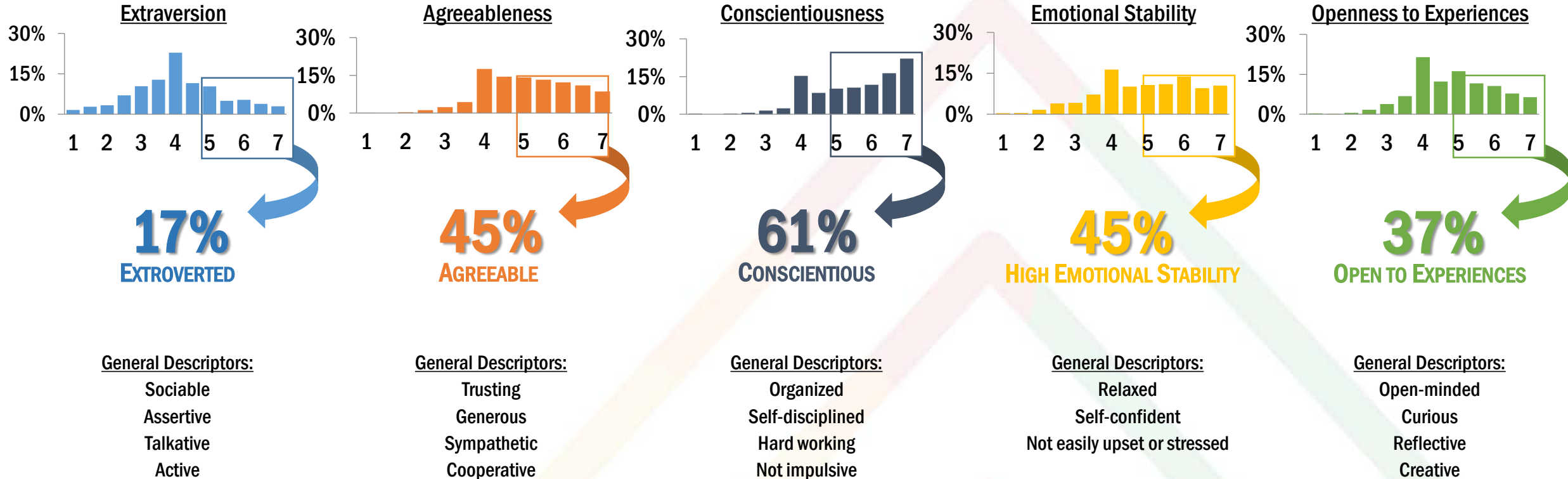


### Subgroup Differences:

- Younger consumers are more likely to be in the action stage, older consumers have often transitioned into maintenance.
- Those with a college degree are less likely to be in the precontemplation/contemplation stages.
- Women are more likely to be taking action, men are more often in the precontemplation/contemplation stages.
- Those with lower BMIs are more likely to be in the maintenance stage.

In an effort to learn more about internal motivation to make healthful decisions, the 2015 survey included a tool that identifies whether respondents possess each of psychology's Big 5 Personality Traits.

### "BIG 5" PERSONALITY TRAITS



2015 n=1,007

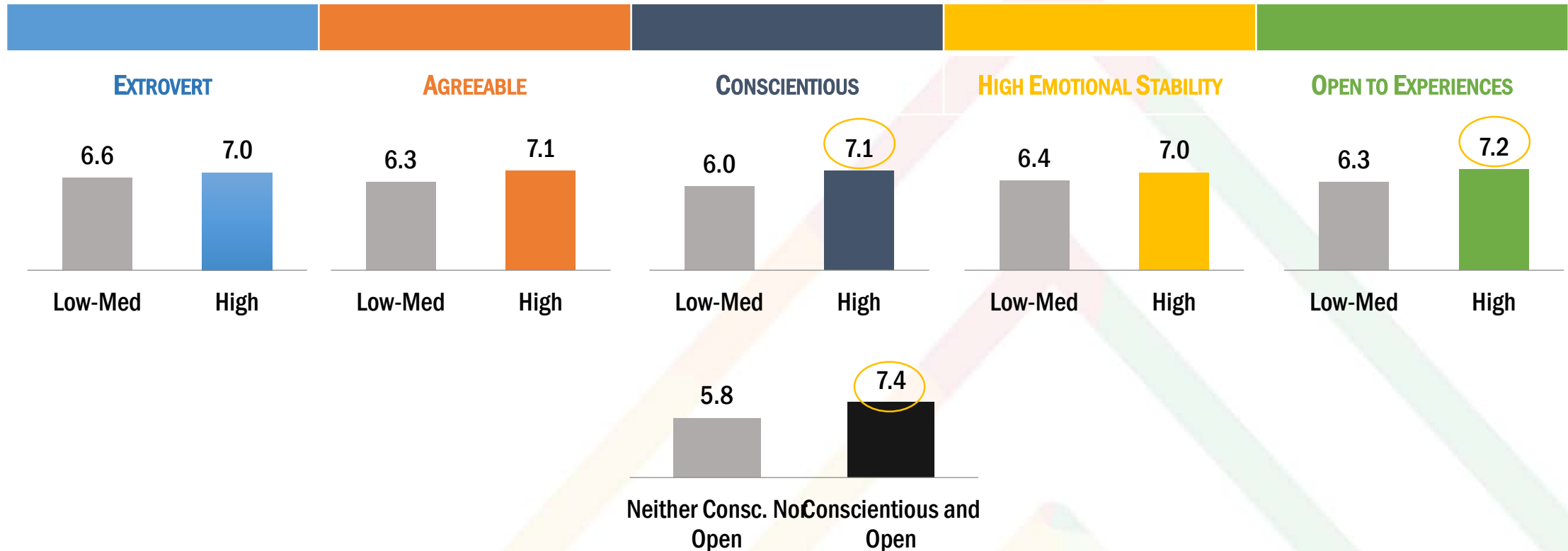
The Big 5 Personality Traits are constructed using Gosling, Rentfrow, and Swann's (2003) Ten-Item Personality Inventory (TIPI). Please see their 2003 *Journal Of Research In Personality* article for more details.



Those who are Conscientious and/or Open to Experiences have more healthy eating behaviors, even when controlling for Age, Gender, and BMI.

Of the 10 healthy eating behaviors (e.g. eating more fruits and vegetables) Americans are currently doing **6.6** of them, on average.

How does personality impact behavior?

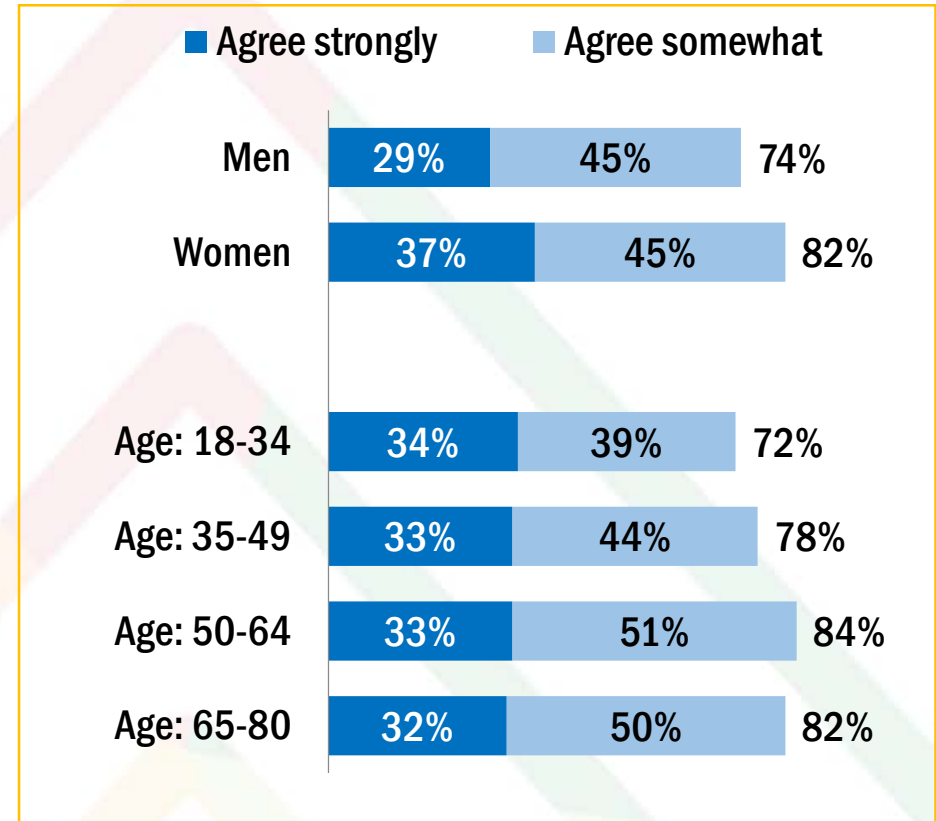
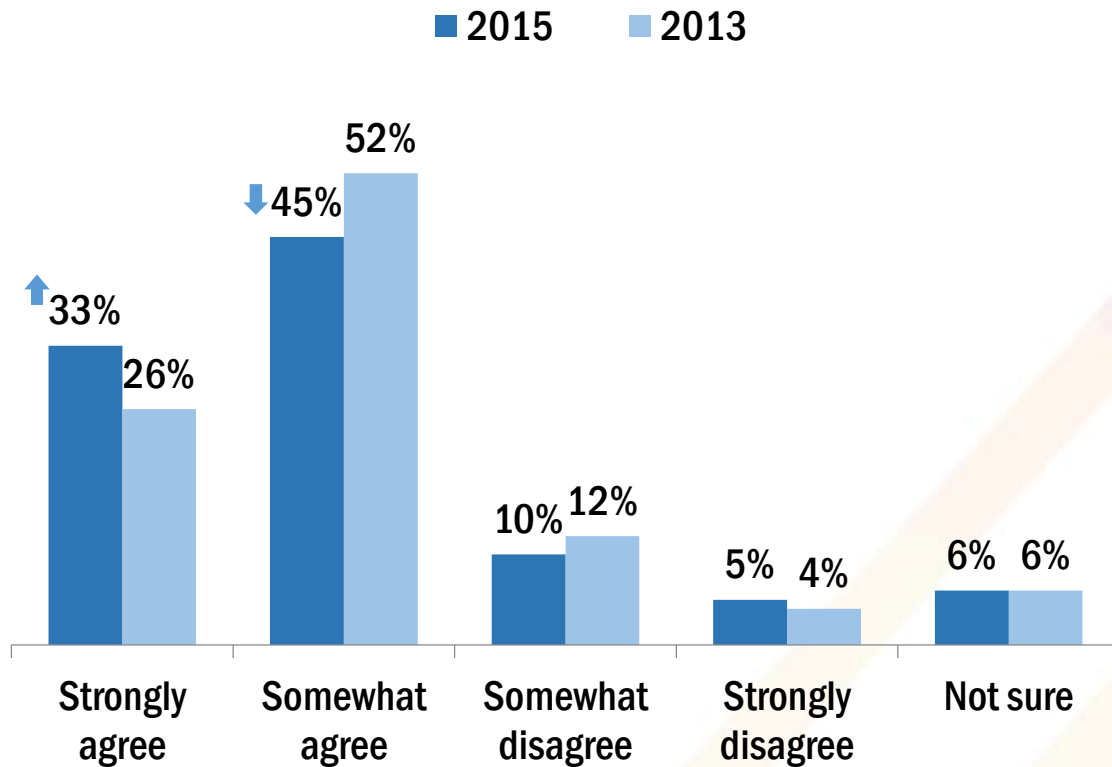


Circle indicate significance between Low-Med and High and Conscientiousness

Most Americans, particularly women and those age 50+, would rather hear what they should eat than what they should not eat.

To what extent do you agree or disagree with the following statement?

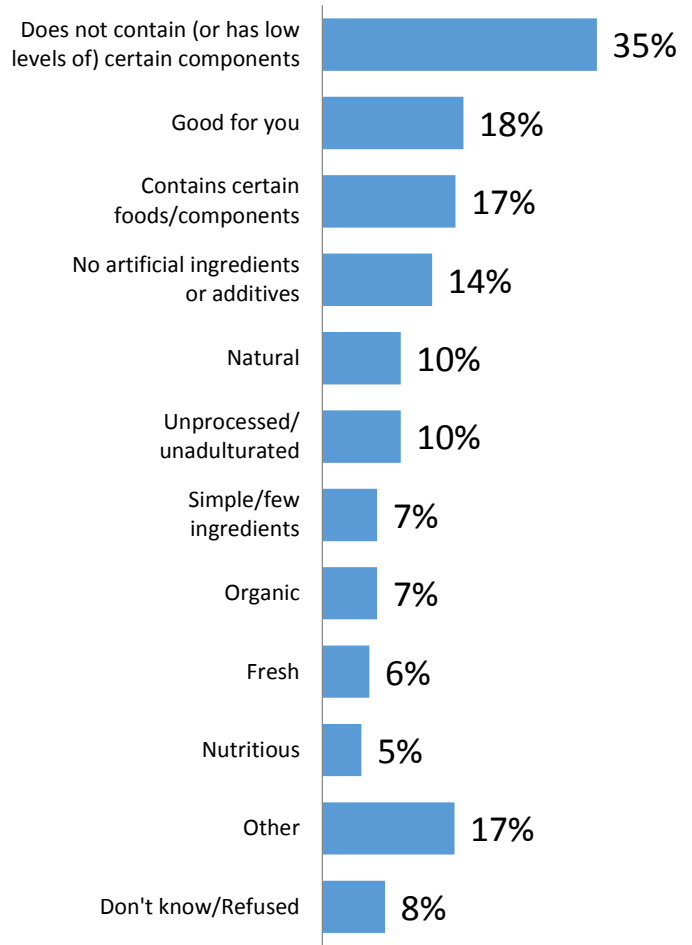
“I would rather hear what I should eat than what I should not eat.”



# For one-third of consumers, a healthy food is defined, in part, by what it does not contain.



How do you define a healthy food? (Open-ended response)



2016 n=1,003  
Coded for multiple responses

## QUOTES ON HOW TO DEFINE A HEALTHY FOOD

A food not necessarily low [in] calories but [has] calories that are nutritious and beneficial to eat. I think of healthy foods as something with good, wholesome, ingredients.

Woman, age 18-34

A healthy food is food that is natural, i.e. unfiltered or sterilized with chemicals. A food that is grown from [the] Earth and not manufactured through a machine or in a lab. Food that is essentially organic and non-GMO. Healthy food is also food that is built with beneficial nutrition, such as vitamins and minerals that serve to drawback hunger while rejuvenating and replenishing the body.

Woman, age 18-34

I define a healthy food as one that does not contain additives or is processed. I prefer whole foods and meat without hormones. Healthy food enables your body to stay functioning at the prime and optimal level.

Woman, age 18-34

Healthy food is nutritious, good caloric value for a given portion, without any artificial chemicals added, and without trans fat. I am a vegetarian and avoid animal products other than milk and sometimes eggs.

Woman, age 65-80

Healthy food is food that provides nutrients to my body that help me to stay healthy. I prefer food that is not contaminated with chemicals, that is grown as naturally as possible, and, if processed, is processed in a natural manner.

Man, age 65-80

A healthy eating style is most often defined by moderation and including certain “healthy” foods.



How do you define a healthy eating style? (Open-ended response)



2016 Sample B n=501  
Coded for multiple responses

QUOTES ON HOW TO DEFINE A HEALTHY EATING STYLE

A colorful variety of natural foods and vegetables. Less processed foods. Items in moderation.  
Woman, age 18-34

Eat what you want but in the correct portions.  
Man, age 35-49

Eating foods that a body needs to function at its best without adding empty and poor nutrient calories as fillers. A naughty treat once in a while, not a daily vice, is OK.  
Woman, age 35-49

The one I am trying to achieve. Limiting eating out, limiting process foods, [and] getting back to basics.  
Man, age 35-49

A healthy eating style includes a well-balanced diet, free of highly processed foods.  
Woman, age 18-34





**THEN BE UNDERSTOOD**



## PHASE III: TOP PERFORMING MESSAGES

CAL

Know your number. Learning how many calories you should consume in a day is a critical first step in managing your weight.

PA

Fun stuff counts as exercise! Get active with the family whether it's soccer in the backyard, dancing to music or taking a walk in your neighborhood.

EB

Take charge of your weight. Balancing the calories you eat and drink with the calories you burn through physical activity puts you in control.

PORTION

Small steps = big changes. Serve smaller portions to help curb calories and keep your weight on the right track.

RICH

Base your plate on nutrient-rich foods that offer beneficial nutrients and fewer calories. Choose fruits and vegetables, whole and enriched grains, lean meats, beans and nuts, and low-fat and fat-free dairy foods more often.

↑CAL

You are an important role model for your children. Show your family how to savor their favorite higher-calorie foods and beverages by enjoying smaller portions together.

© 2010

Dietary Guidelines Alliance



# What We Know

- Food is top of mind for consumers, but has different meaning for different ages, economic status, and education level
- There is a disconnect between consumers' perceptions of their weight status and health which may interfere with the desire to make diet and behavior changes.
- Consumer messages must relate to the intended audience and their stage of change.
- As the science-based experts in nutrition, RDNs/PhDs must earn consumers' trust as an authentic source for advice rather than just delivering information.
- Future dietary guidance needs to address behaviors by understanding where consumers are.



# Economic Divide Exists

- Higher and lower income individuals have different:
  - food purchasing behaviors
  - perceptions about food
- Higher-income consumers are:
  - more likely to buy foods based on their production or source (locally sourced, no added hormones or steroids, organic)
  - more likely to report avoiding many specific food components and ingredients
  - more likely to have a negative perception of packaged foods
- Lower income consumers are:
  - more likely to value the affordability of packaged foods
  - more likely to spend extra money on groceries



## A CALL TO ACTION

- Meet clients **where they are**.
- Create health strategies that **fit in** their lifestyle.
- Use **positive**, simple, actionable messages.
- **Connect** delivery method and style best for clients.
- Recognize small steps **forward** are victories.

## REMINDER

“No one cares how much you know, until they know how much you care”

— Theodore Roosevelt

THANK YOU!

**If you have questions, please contact me . . .**



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NAVIGATING THE CHANGING **FOOD**, **AGRICULTURE** AND **CONSUMER** LANDSCAPES.