Portion Balance – Attitude and Action Tracking

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Research America Inc.

STRATEGIC CONSULTING IN HEALTH & SUSTAINABILITY SINCE 1990

Business for Impact

GEORGETOWN UNIVERSITY
McDonough School of Business

PORTION BALANCE COALITION

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Portion Balance Coalition Background & Research Objectives

<u>Portion Balance Coalition Background:</u>
The vision of the Portion Balance Coalition is: A food ecosystem where at every eating occasion, everyone desires and is able to choose and enjoy balanced food portions in support of a healthy lifestyle. The Portion Balance Coalition mission is to: Create, foster, and amplify cross-sector and sector-wide actions for healthier eating by focusing on portion balance, defined as a mix of volume, proportionality, and quality. The focus on portion balance has galvanized a multi-sector group of collaborators to join forces and address the prevalence of persons with obesity/overweight by focusing on volume (size), proportionality (variety), and quality (nutrient density) of our food, drinks, and meals. This work is targeting messaging to build individual empowerment supported by products/tools across the food landscape. The work style is collaborative, consensus building and intended to amplify learning that exists, or is developed by, the coalition.

The Portion Balance Coalition seeks measurable change in *activating consumers to create demand and acceptance for healthier food potions, motivating the industry to respond to the demand.*

<u>Research Objectives:</u>
- Learn whether consumers have made portion-specific behavior changes post-COVID compared to pre-COVID days (2019 survey acts as a pre-COVID baseline)
- Establish this survey as a second wave for a portion tracking study, intended to be replicated every 2 or 3 years. Questions cover four sections: awareness, knowledge/confidence, attitudes, and behaviors
- Uncover specific portion-related data related to foods, beverages, confections, and snacks as well as for away-from-home eating
- Report on the findings by the five NMI segments

This Health Crisis, Heavy Weight/Obesity, is Multi-dimensional

In our efforts to work towards *a food ecosystem where everyone desires, and is able to choose and enjoy, healthy, balanced food portions at every eating occasion,* we acknowledge the complexity of the problem and recognize that solutions are multi-faceted.

- Obesity is, in many cases, a physiological health situation that cannot be simply addressed by eating less and exercising more
- Culturally, in the U.S., there is proven negative bias towards persons who carry more weight than doctor's say is healthy
- The availability of healthy, nutritious food is not universal – food deserts are prevalent and most often in communities facing many socio-economic challenges

- Identifying populations of consumers with obesity/overweight is not intended as a denigrating label but as an identifier of those who *may* see benefit from the Coalition initiatives; though we believe all populations can benefit from knowledge of food proportionality and food quality.
- This work is intended to create a data-driven foundation for current attitudes and behaviors around healthy balanced portions at every eating occasion – in-home and away-from-home and to identify a consumer target who may be open to initiatives to help them make healthier choices – the movable target.

Methodology

Methodology:

- 20 minute online survey
- n=1000 General Population respondents balanced on age by gender, income, region, race/ethnicity, education; all demographic groups are represented as based on total US GP proportions
- Oversample of households with children, n=300
- Generational age breaks are as follows: iGen (18-24); All Millennials (25-45); Younger Millennials (25-31); Older Millennials (32-45); Gen X (46-57); Boomers (58-76); Matures (77+)
- NMI's Health & Wellness Segmentation was utilized

- Where applicable, data has been compared to an original study conducted in Fall, 2019. Specs for that project include:
  - 20 minute online survey
  - n=4700 General Population respondents balanced on age by gender, income, region, race/ethnicity, education based on total US GP census proportions
  - NMI's Health & Wellness Segmentation was utilized

Approx. 3.4% points of difference between the 2019 Study and this 2022 Study are statistically significant at 95% confidence

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Executive Summary

People say they are taking positive action which is encouraging

% GP: Compared to pre-COVID pandemic, I have made some changes to help me manage my weight by ...

Change	%
Eating more meals at home	72%
Drinking more low or no sugar sweetened beverages	61%
Choosing more snacks lower in sugar, sodium, or fat	60%
Eating smaller portions	58%
Exercising more	56%
Choosing more portion-controlled snacks (e.g., 100-calorie packs)	50%

More than half the adult population recognize a variety of healthy foods, in the appropriate portions is what makes up health eating

% GP indicating the top 3 attributes that define healthy eating for them

% of time each attribute was ranked in the top 3

Attribute	% of time ranked in top 3	% times ranked #1
Eating a variety of foods from the basic food groups	52%	**22%**
Avoid high sugar, high sodium, high saturated fat foods/beverages	42%	13%
Eating appropriate portion sizes at each meal or snack	42%	14%
Avoiding processed foods	31%	11%
Natural foods	27%	11%
Limiting certain food(s) I define as unhealthy	23%	6%
Limit high-calorie foods/beverages	20%	4%
Limited or no artificial ingredients or preservatives	20%	6%
Organic foods	19%	8%
Aligns with advice/guidance from a healthcare professional	13%	4%
Can include higher calorie treats in moderation	11%	3%

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Q1 -How do you define a healthy diet or eating pattern? Please rank the top 3 attributes that best fit your definition with 1=top choice; 2=second choice; and 3=third choice

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More people are using portion management tools;
thus there is a need to continue to reinforce the basics and educate people on helpful tools
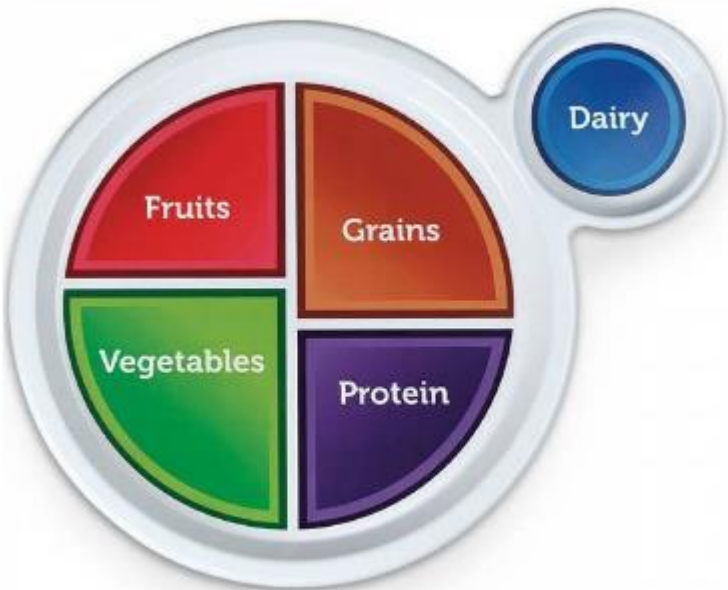
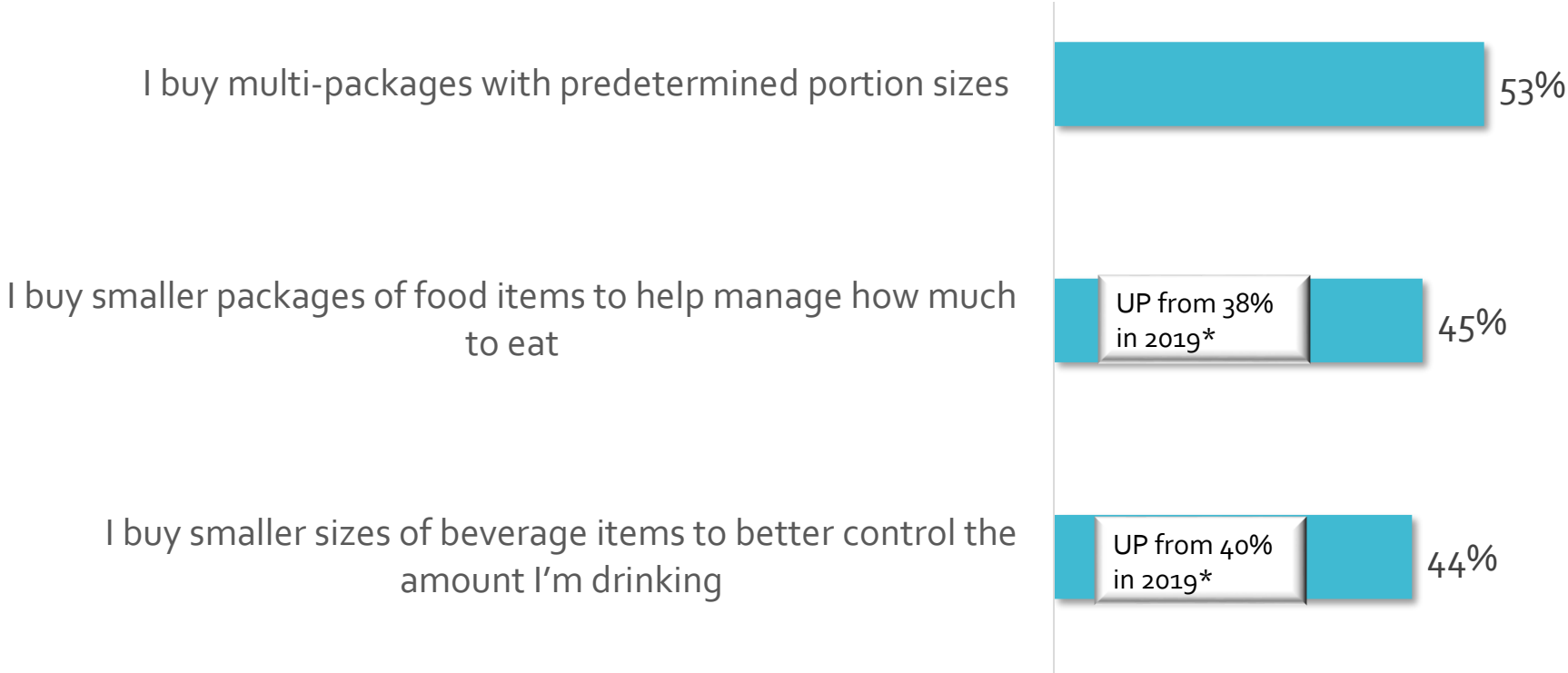% GP who always/often use the following methods to manage
how much they eat and drink *at home*

		2019 data
Use calore counters, apps, measuring cups or other measuring tools	34%	30%
Base it on the MyPlate visual	30%	23%
Refer to photos online or in magazines that display food	30%	22%
Use a sectioned plate	26%	20%

Q6 -Indicate your level of awareness of each of the following statements

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The use of smaller-sized packages of both food and beverages is on the rise as more people are using this as a means to control and manage "how much"

% GP who agree completely/somewhat with the following statements

I buy multi-packages with predetermined portion sizes — **53%**

I buy smaller packages of food items to help manage how much to eat — [UP from 38% in 2019*] **45%**

I buy smaller sizes of beverage items to better control the amount I'm drinking — [UP from 40% in 2019*] **44%**

.Those with incomes of $100K+, and educational levels of college degrees or higher and households with kids are most likely to buy small packages.

Q12- Please indicate your level of agreement with the statements

*NOTE: Question wording was slightly different in 2019: I like buying smaller packages of food items to cut down on portions
Other trended measures showed no significant changes from 2019

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Most consumers claim confidence in knowing how much they should eat to maintain a healthy diet and weight, a significant portion of the population is confident they know how much to give children and what volumes and calories they should be consuming

%. GP indicating they are confident about knowing how much they
should eat for a healthy diet (top 2 box on 1-5 scale)

74%

UP from 70%
in 2019

65%

57%

Appropriate amount to serve
your children for a healthy
diet and weight
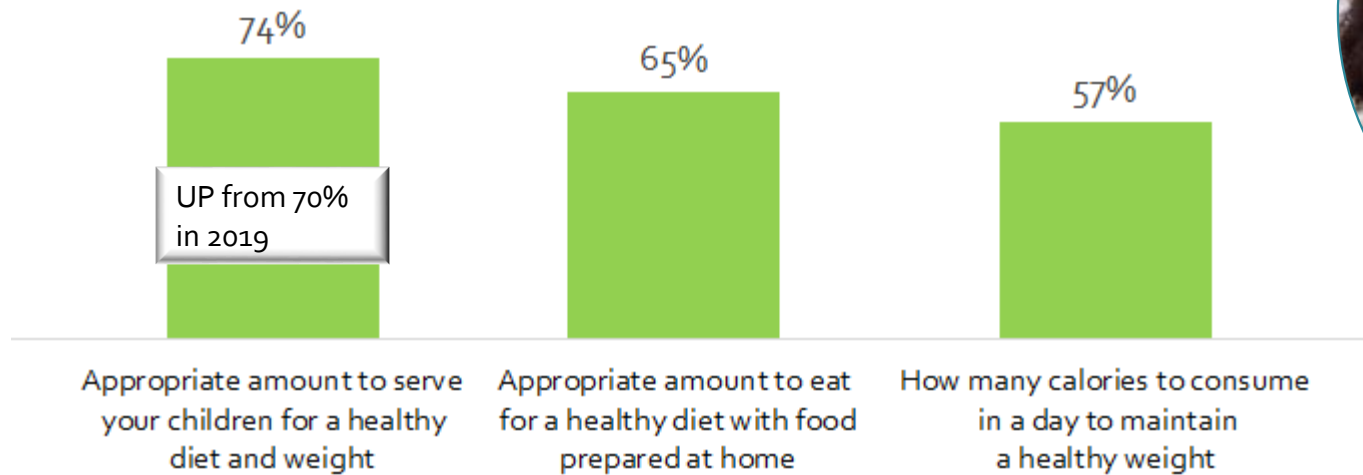
Appropriate amount to eat
for a healthy diet with food
prepared at home

How many calories to consume
in a day to maintain
a healthy weight

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Statistically significant changes since Pre-Covid show more people excited about eating out and eating well
AND more people using portion management strategies in restaurants;
Both are good news for restaurants!

COVID restrictions have made eating out even _more_ exciting!
- Liking restaurants that serve large portions because it's a treat to eat out increased from 42% to 56%.

Even more people than ever are using portion management strategies in restaurants!
- Wanting restaurants to offer standard portion sizes increased (58% to 62%) as did overeating at a restaurant and feeling uncomfortable afterwards (42% to 47%).
- Strategies to manage how much is eaten out have increased*
  - Sharing entrée, dessert… 28% to 44%
  - Asking server for guidance… 22% to 33%
  - Asking server for a container at the beginning of the meal… 18% to 32%
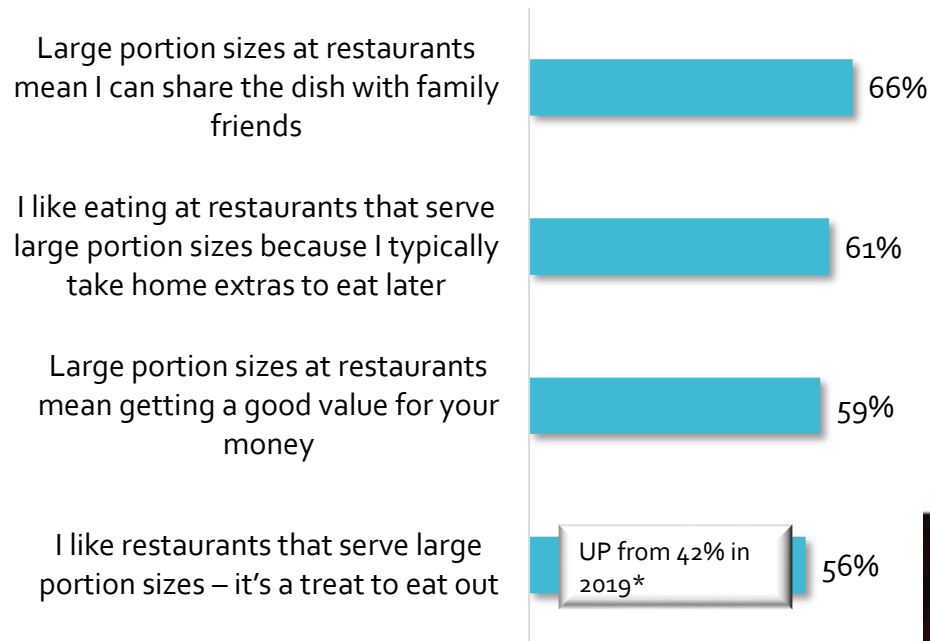 - Ordering a kids' portion… 20% to 29%

*The question wording changed from 'ever' to 'how often' and may account for some of this change

There is a clear mandate for restaurants to offer/feature more portion management solutions!
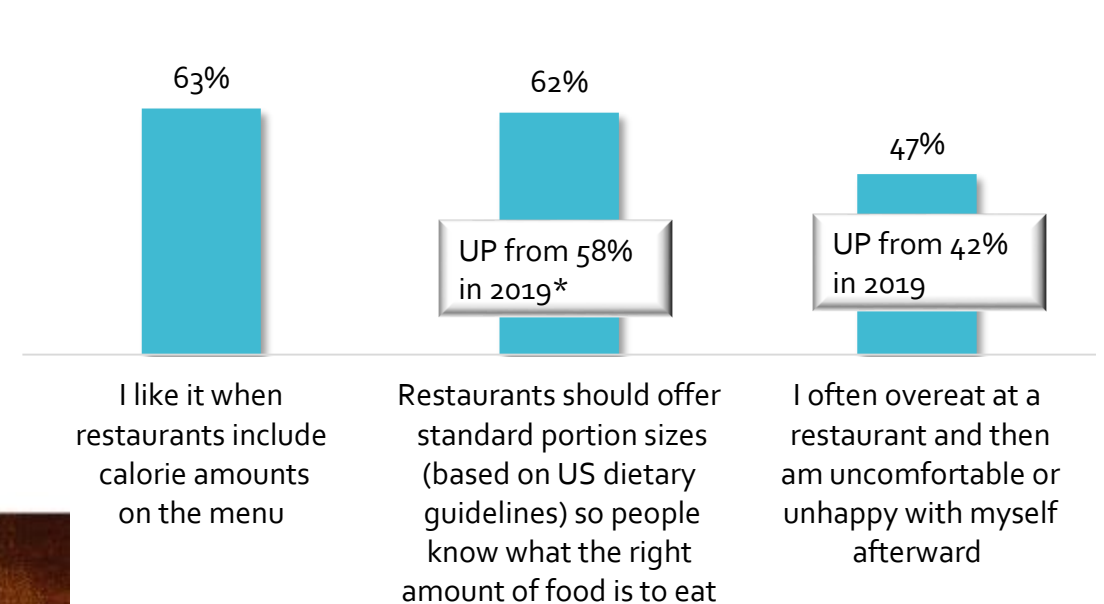
Restaurant dining presents a conundrum – people like to eat out and value large portions, YET they want help from restaurants in making better portion decisions

% GP who agree completely/somewhat with the following statements

Consumers do like large restaurant portions....

Large portion sizes at restaurants mean I can share the dish with family friends — **66%**

I like eating at restaurants that serve large portion sizes because I typically take home extras to eat later — **61%**

Large portion sizes at restaurants mean getting a good value for your money — **59%**

I like restaurants that serve large portion sizes – it's a treat to eat out — **56%**
> UP from 42% in 2019*

...But they also want the opportunity to make good choices

63%
I like it when restaurants include calorie amounts on the menu

62%
> UP from 58% in 2019*

Restaurants should offer standard portion sizes (based on US dietary guidelines) so people know what the right amount of food is to eat

47%
> UP from 42% in 2019

I often overeat at a restaurant and then am uncomfortable or unhappy with myself afterward

Q11 -Please indicate your level of agreement with the statements

Appendix

NMI Provides Unparalleled Global Expertise in Health & Sustainability

❖NMI is an international strategic consumer insights firm, specializing in consumer trends and innovation since 1990.

❖Our mission is to focus on the interconnectedness of personal health/wellness, sustainability, and healthy aging.

❖Our goal is to help clients grow their business through the identification and validation of new ideas and solutions.

NMI's Health & Wellness Segmentation

NMI's Health & Wellness Segmentation Model Methodology

Development of the Institute's Health & Wellness segmentation model began in 2009 with evaluating over 515 different attitudinal and behavioral variables, later narrowed to approximately 19.

A k-means clustering method was used. Cluster centers were defined as dense regions in the multivariate space based on a k-means segmentation of the attitudinal and behavioral variables from the Institute's Health & Wellness Consumer Trends Database survey.

This segmentation can be used to identify and predict segment membership as part of a quantitative extrapolative analysis of future consumer behavior.

5 Unique Segments: each segment is mutually exclusive and is designed to have the maximum differentiation between consumer groups and the maximum homogeneity within each consumer group. The predictive accuracy is high at 92.2%.

The segmentation has been overlaid on third-party data sets such as Nielsen's Homescan and can be used through the Institute in custom/primary qualitative or quantitative research.

The Institute's Health & Wellness consumer segmentation identifies five distinct segments within the U.S. general population

WELL BEINGS®

27%

- Most health pro-active
- First adopters
- Use many health modalities

FOOD ACTIVES®

10%

- Mainstream healthy
- Basics, balance and control
- Desire inherently healthy foods

MAGIC BULLETS®

22%

- Lack commitment to healthy lifestyle
- Quick, easy solutions
- Health managers

FENCE SITTERS®

30%

- "Wannabe" healthy
- Highly aspirational
- Price sensitive

EAT, DRINK & BE MERRYS®

11%

- Least health active
- Little health motivation

Source: NMI's 2022 Health & Wellness Survey

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