

Nutrition And Eating Out: “Getting Inside The Consumer’s Head”

“Eating Out”: Is it a necessity, a treat, a convenience, or a social event? How does nutrition fit in the picture or does it even fit in at all? How does the quest for nutrition impact the restaurant industry and influence the decisions made by consumers?

These questions will be answered by examining the nutritional backdrop of restaurant visitors and comparing the behavior and attitudes between light/medium and heavy restaurant visitors and how this carries over to their “eating out” experience.

We will explore the following topic areas:

- How important is nutrition to restaurant goers?
- What is the role of organics and fortified foods on menus?
- How appealing are healthy menu items to restaurant goers?
- What meal/snack behavior may influence restaurant menus?
- Do restaurant goers use labels and nutritional information?
- Which attributes or nutritional claims should be highlighted?
- What are future health plans of restaurant visitors?

The data is based on information from Decision Analyst’s Health and Nutrition Strategist™ (HANST™). HANST™ is an ongoing comprehensive study on consumer nutrition and health trends conducted annually among 4,000 nationally representative adults starting in January 2006.

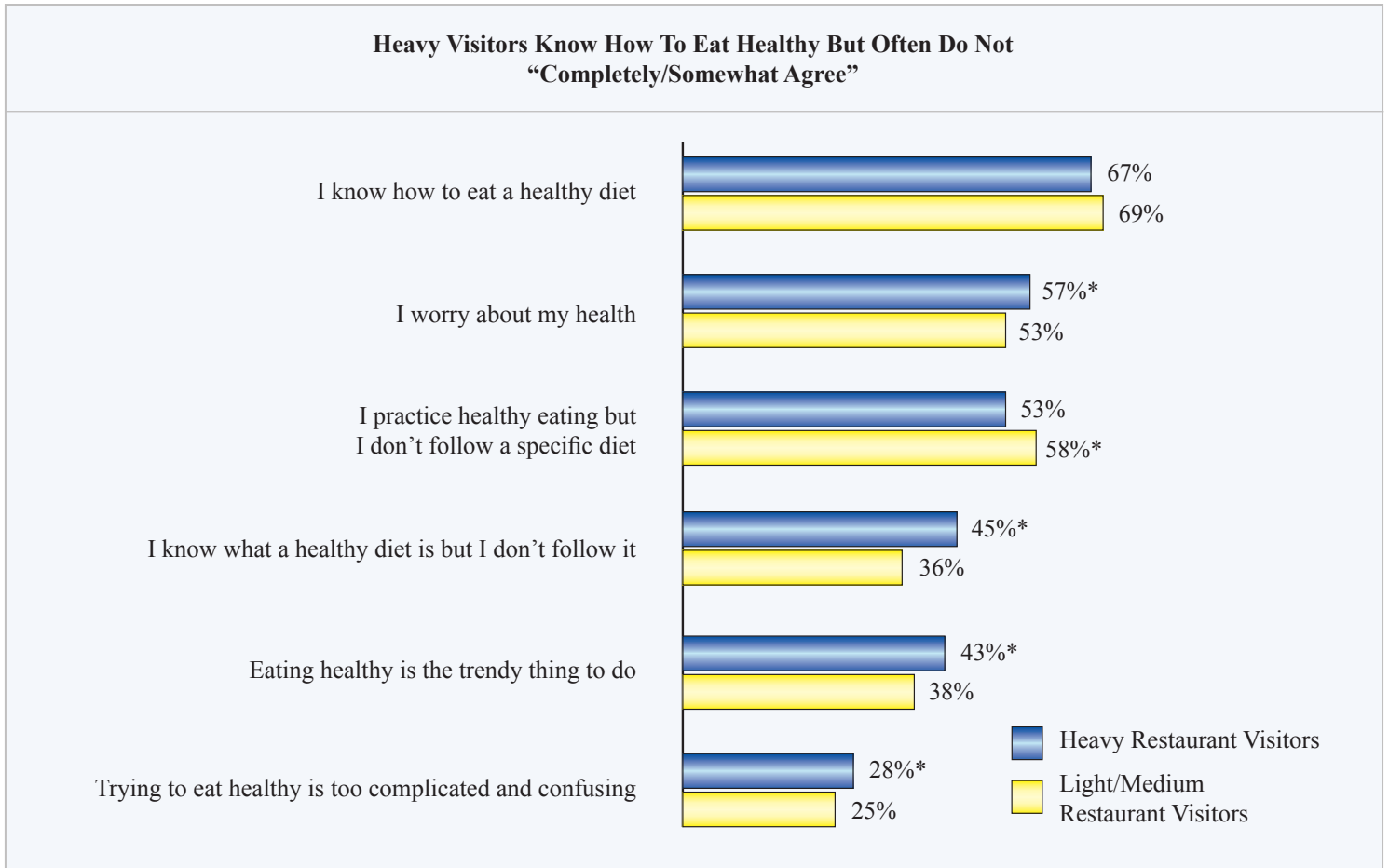
Nutritional Profile Of Restaurant Goers: “Getting Inside Their Heads”

The majority of restaurant visitors agree a healthy lifestyle is a “matter of choice.” However, because heavy restaurant visitors are more challenged, less motivated, and less optimistic about nutrition, restaurants should consider different nutritional strategies for heavy and light visitors. Nutrition in restaurants is still important since there is a small but strong core of nutrition enthusiasts as well as nutritional interest even among the “less engaged.”

Heavy visitors report eating out four or more times per week versus medium/light visitors eating out one to three times per week. Heavy visitors skew younger (particularly those aged 18 to 34) and male. The average age for heavy visitors is 42.3 years old compared with 46.9 years old for medium/light visitors.

Most Restaurant Goers Know How To Eat A Healthy Diet

The majority (just over two-thirds) of restaurant visitors report they know how to eat a healthy diet compared with only about one-quarter who believe eating healthy is too complicated and confusing. Heavy visitors are more likely to report healthy eating is trendy, and while they worry about their health, they do not follow a healthy diet.



Question: Using the scale below, how much do you agree or disagree with the following statements about your approach to diet and lifestyle?

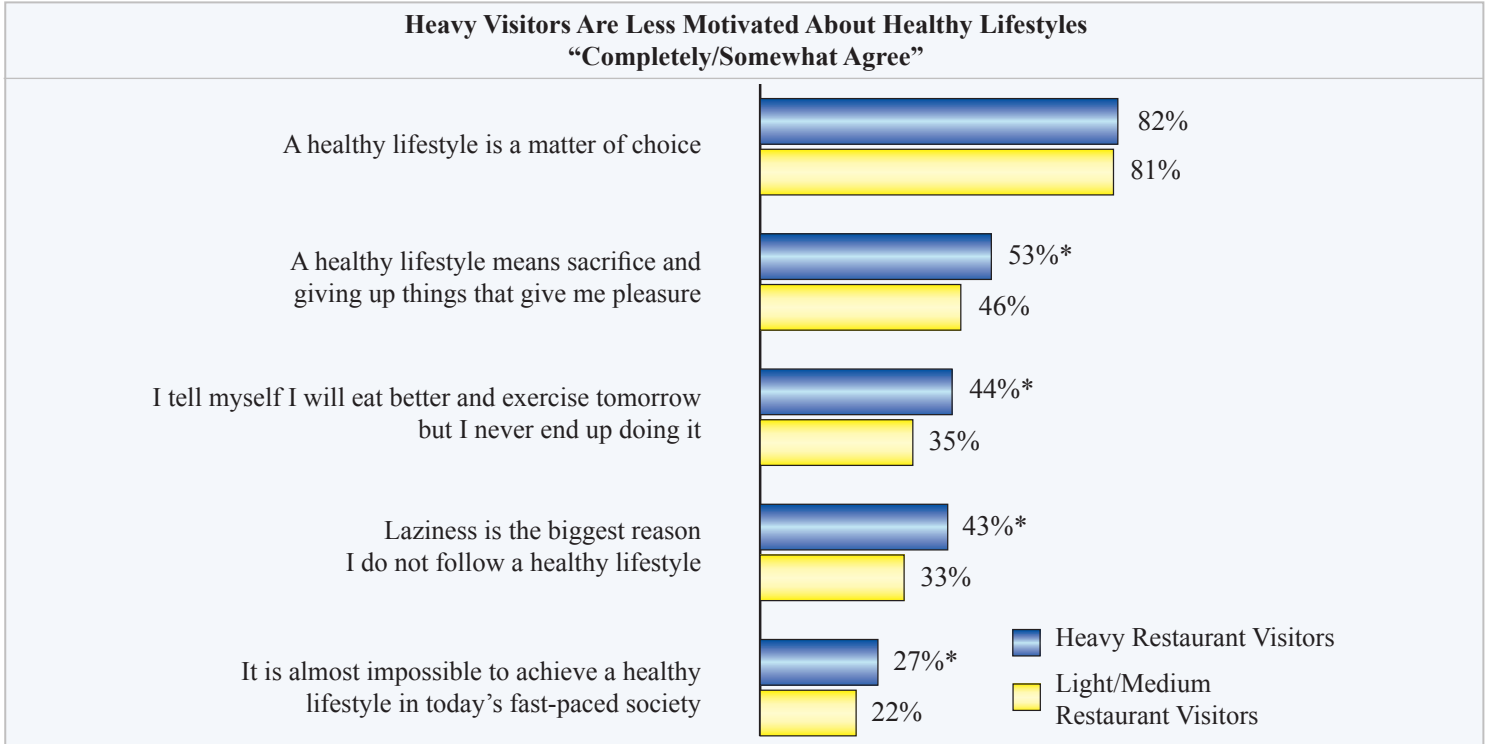
Base: 2,157 Heavy Restaurant Visitors and 1,576 Medium/Light Restaurant Visitors

*Difference is significant at the 95% confidence level

How Do Restaurant Visitors Define And Approach A Healthy Lifestyle?

How do restaurant visitors define and approach a healthy lifestyle? Heavy restaurant goers are more discouraged about and less motivated to maintain a healthy lifestyle.

Restaurants can market to heavy visitors by making a “healthy lifestyle” less imposing and more easily attainable. Restaurants could offer a healthy midday snack or an on-the-go nutritious breakfast with a “health halo” message, such as “maybe you can’t always take the best care of yourself so let us help.”



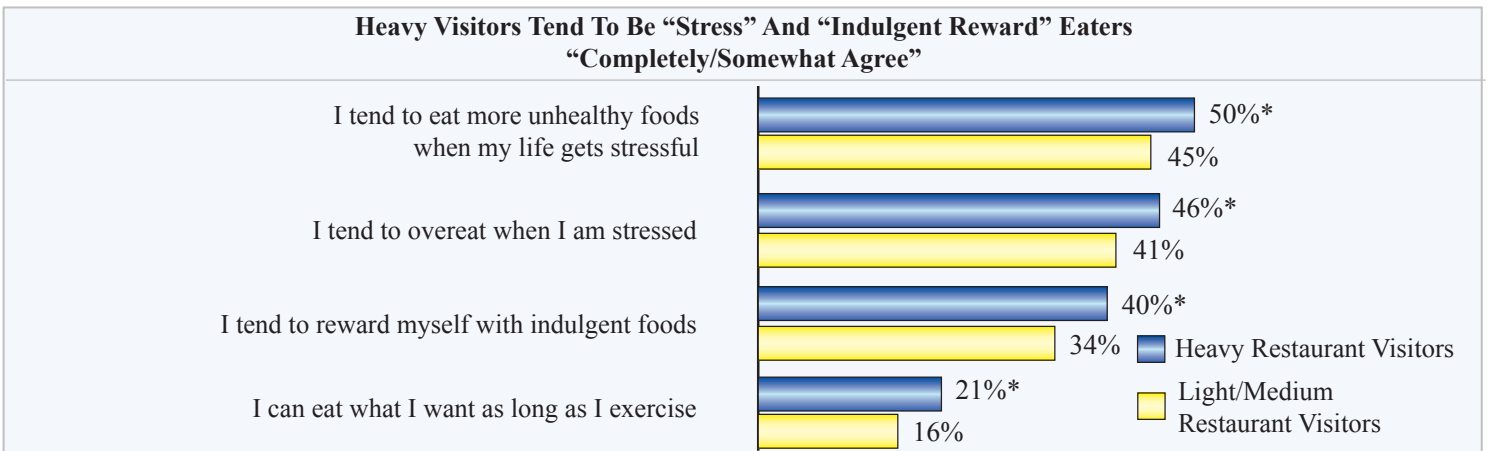
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Behavioral Eating: “Stress” And “Indulgent Reward” Eaters

Heavy restaurant goers are more likely to be “stress eaters” and “indulgent reward eaters” and believe that if they exercise they can eat anything they want. There may be an opportunity to present menu items as a “stress reliever” or a “reward” to address their “nutrition” guilt.



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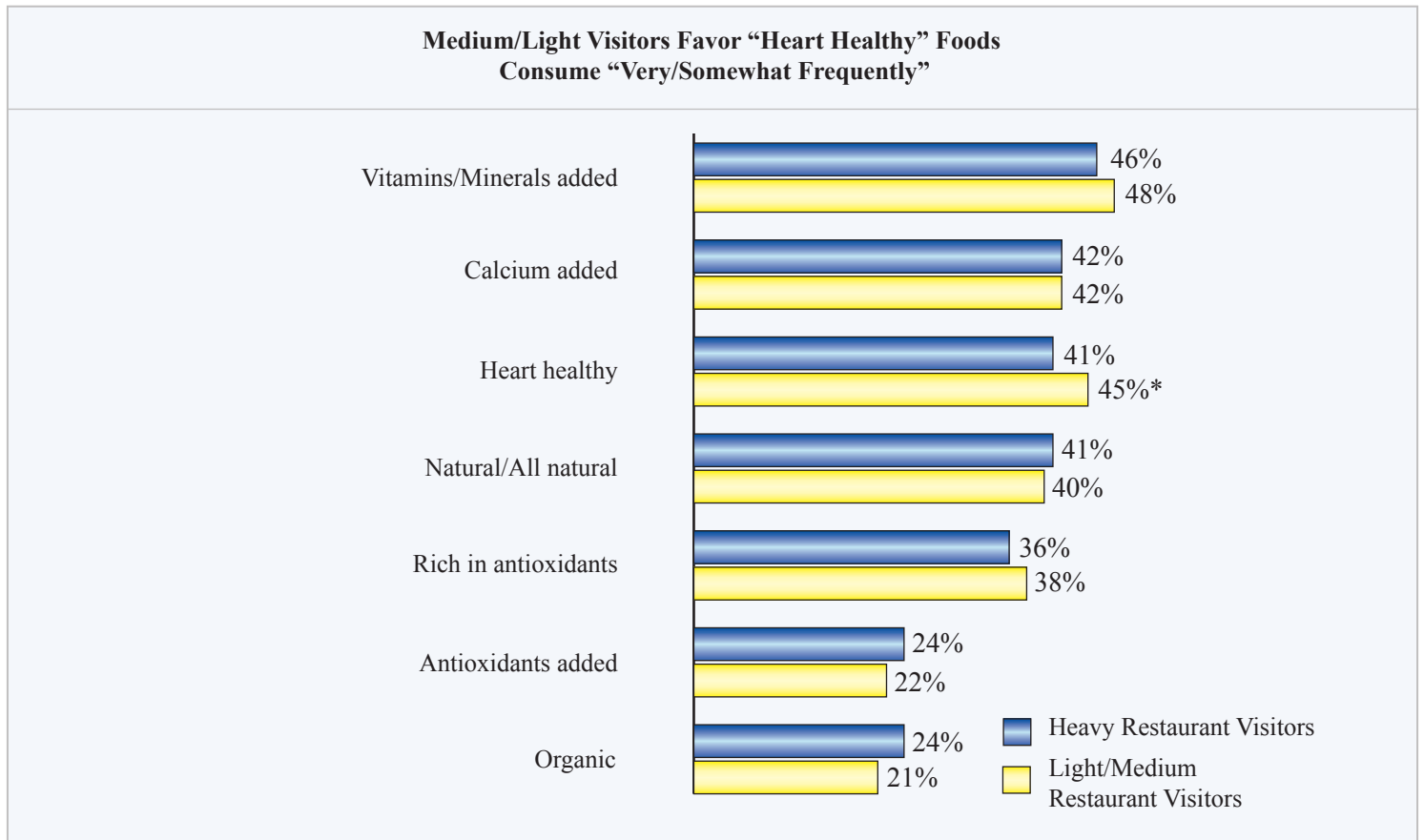
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Fortified, Organic, And Natural Foods: Their Role In The Restaurant Arena

A similar share of both segments consumes fortified foods, natural foods, antioxidants, and organics. One key difference is medium/light restaurant visitors are more likely to consume “heart healthy” foods.

Given that at least four of ten respondents from both groups frequently consume vitamin-fortified, calcium-added, heart healthy, and natural foods, it may be beneficial to offer or showcase these foods on restaurant menus. Ideas would include offering “calcium added” or “heart healthy” fruit juices.

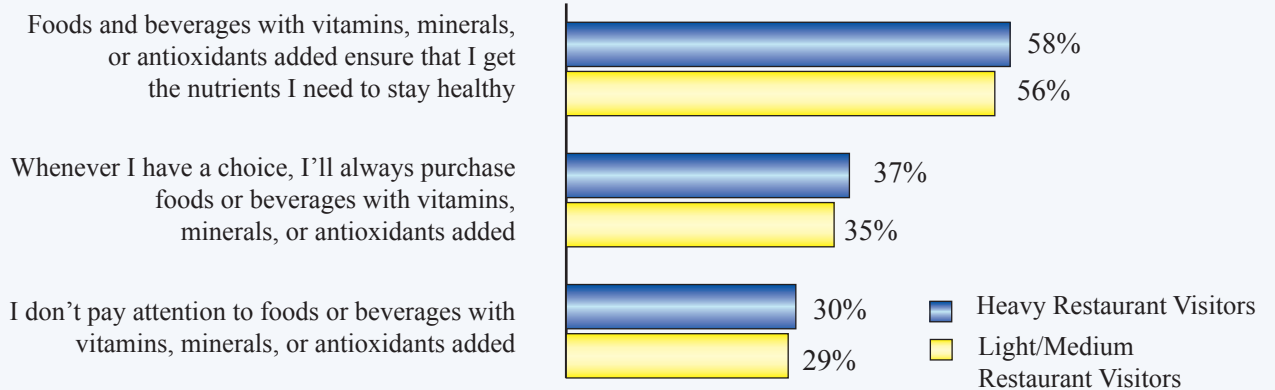


Question: How often do you consume foods and beverages described as follows...?
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What are the attitudes regarding fortified foods? Approximately one-half of each segment feels they are taking better care of themselves by eating organic foods/beverages and that fortified foods/beverages ensure they get necessary nutrients to stay healthy.

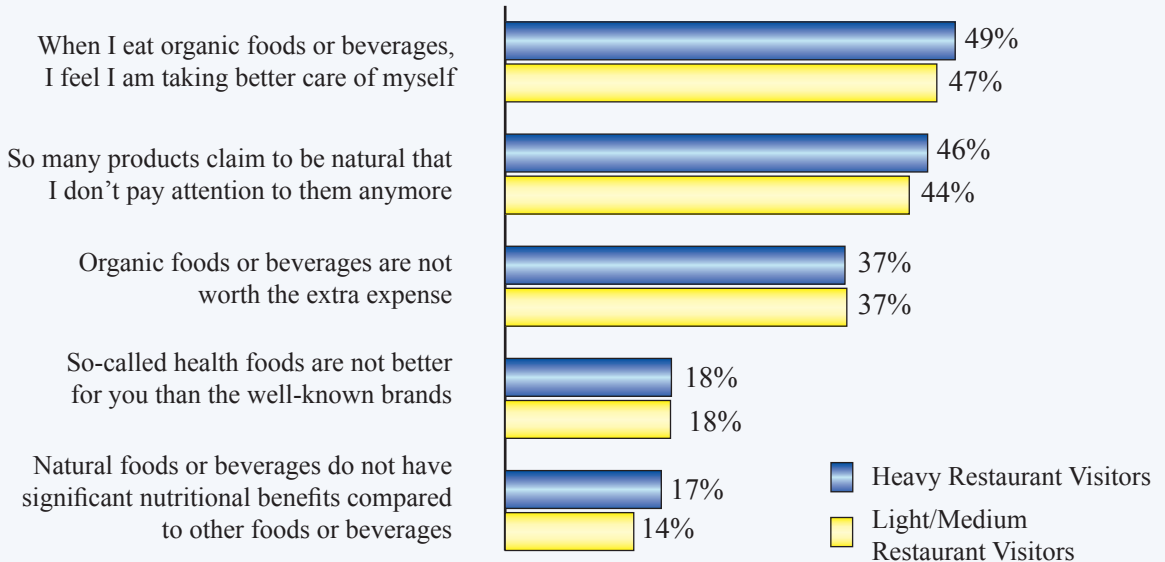
More than one-third of both segments agree that they always purchase fortified foods when there is a choice, and three of ten restaurant goers pay no attention to fortified foods. Notably, more than one-third of both segments do not believe the added expense for organics is justified. Offering these foods or emphasizing their positives, however, does attract both heavy and medium/light restaurant visitors, with the extra bonus of reducing the “guilt” felt by heavy visitors about their nutritional habits.

**Fortified Foods “Always” Purchased By One-Third of Restaurant Goers
“Completely/Somewhat Agree”**



Question: Using the scale below, how much do you agree or disagree with these statements about organic, fortified, and natural foods?
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**Almost Half Of Restaurant Goers Feel Good About Eating Organics
“Completely/Somewhat Agree”**

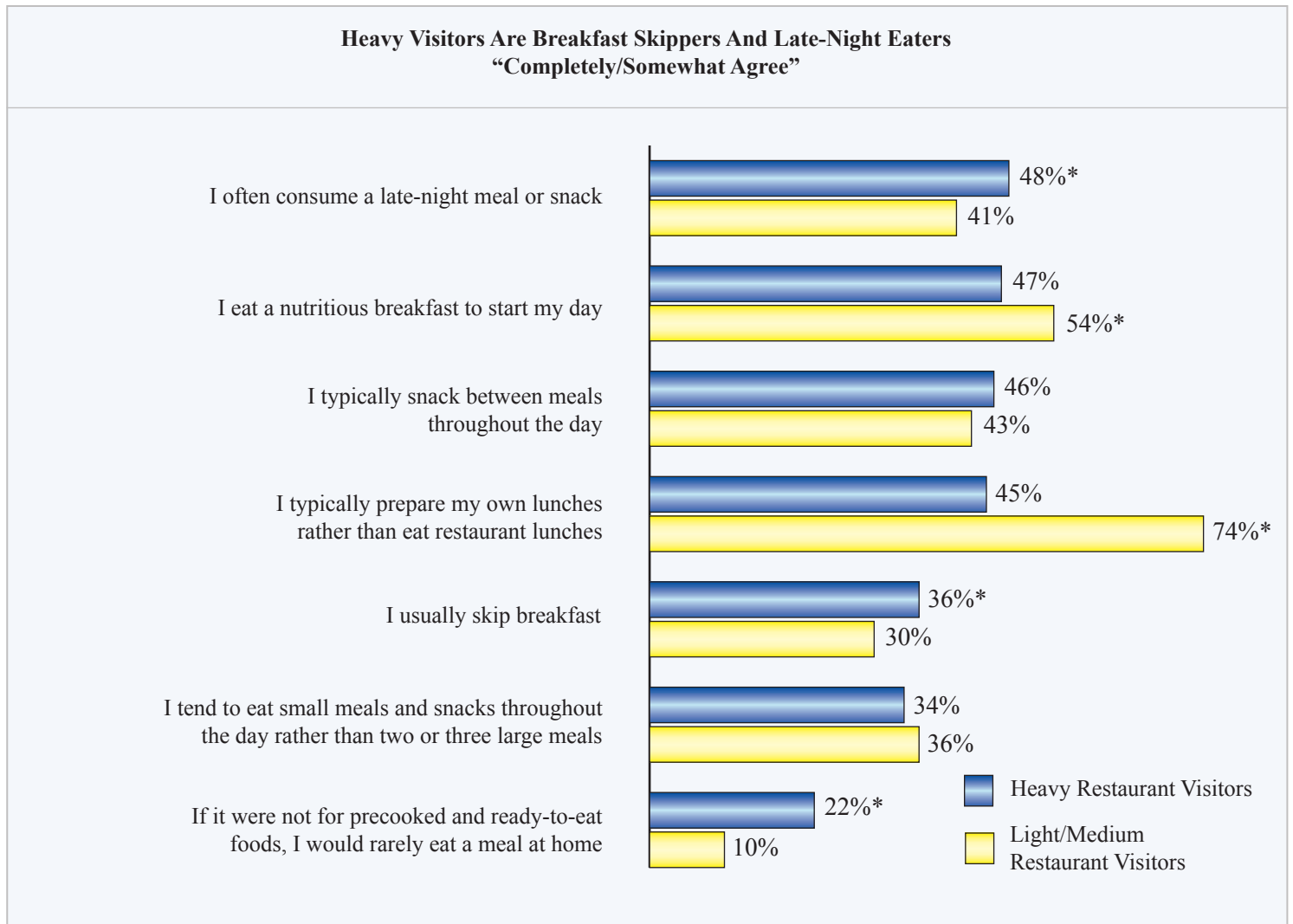


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Meal/Snack Occasion Behavior: Potential Impact On Restaurant Menus

Heavy restaurant visitors tend to skip breakfast more, consume a late-night meal/snack, and snack between meals during the day. They were also more likely to agree that if it were not for precooked and ready-to-eat foods, they would rarely eat a meal at home. Medium/Light restaurant visitors are more likely to prepare their own lunches rather than eat restaurant lunches and start their days with nutritious breakfasts.

The appeal for heavy visitors will be an evening snack or a “why skip breakfast” breakfast. Medium/Light visitors can be targeted with an innovative nutritious breakfast or “take a brown bag break and let us do the cooking today.” This also presents an opportunity for producing branded frozen or ready-to-eat foods offered within retail outlets.



Question: Using the scale below, how much do you agree or disagree with the following statements about the meals and snacks you consume?

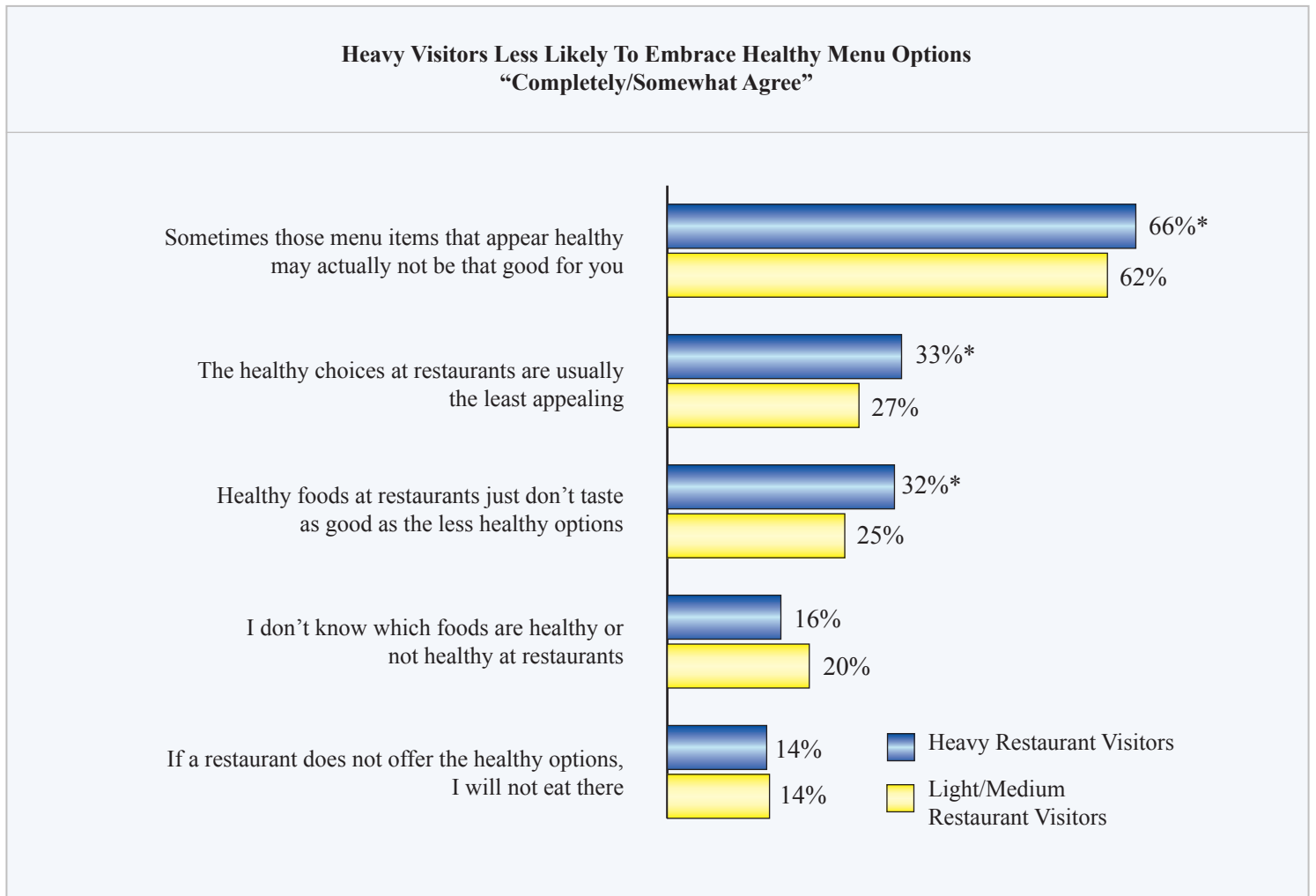
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The Appeal Of Healthy Menu Items: Heavy Visitors A Harder Sell

About two-thirds of both heavy and medium/light restaurant visitors are skeptical about the “goodness” of healthy menu items. About one-fifth of both segments have no idea what is healthy or not at restaurants, while there is still a core purist group for both segments that declare they won’t venture into a restaurant if it does not offer healthy options.

What about the appeal of healthy choices? Heavy restaurant visitors are a harder sell. About one-third report that healthy choices are usually the least appealing and just don’t taste as good as less healthy options compared with about one-quarter of medium/light visitors who share these thoughts.

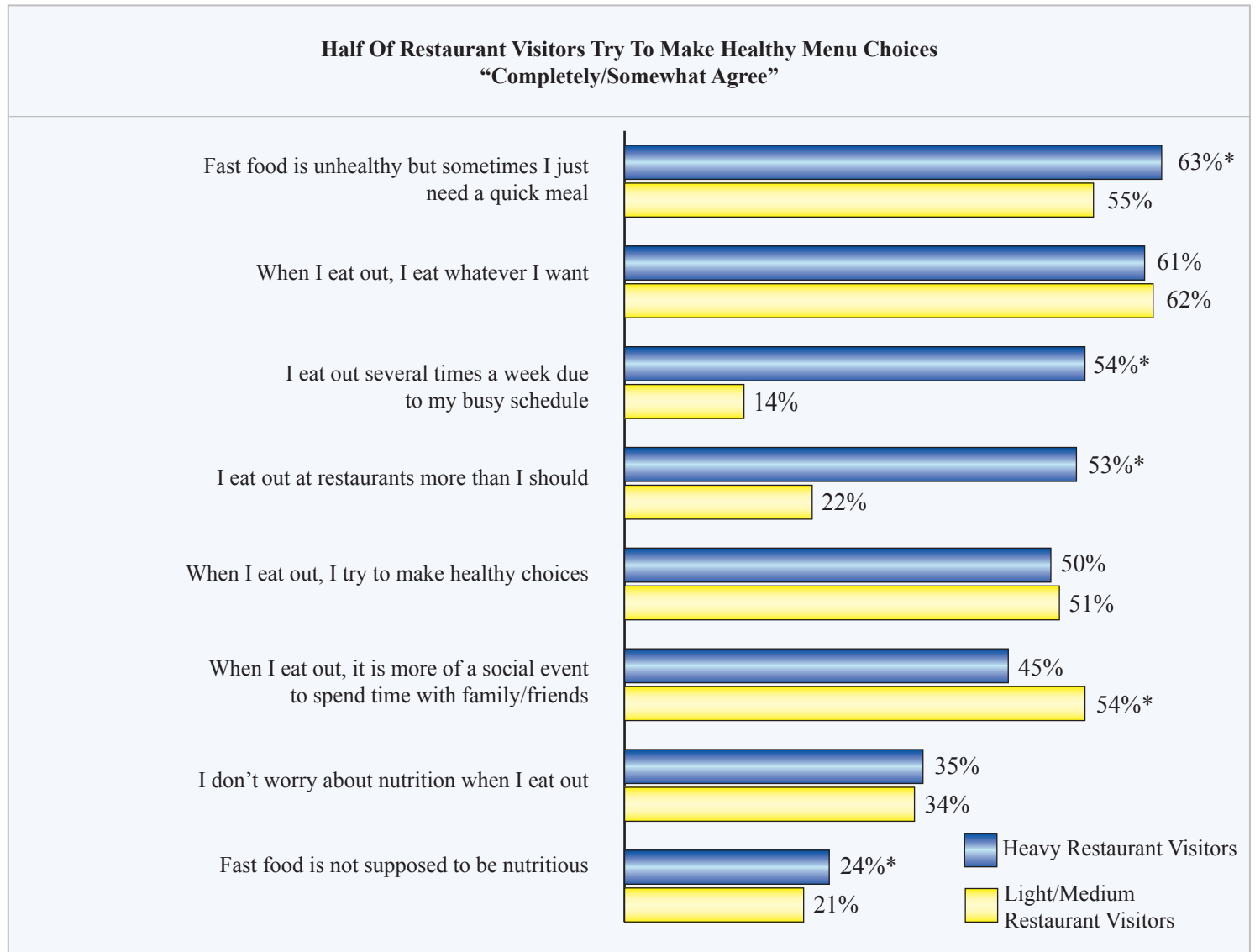


Question: Using the scale below, how much do you agree or disagree with the following statements about restaurants and eating out?

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Six of ten restaurant visitors eat anything they want when eating out and half make an attempt to make healthy choices. Heavy visitors acknowledge fast food is unhealthy and that they eat out more than they should. Medium/Light visitors are more likely to view eating out as social time with family and friends. More than one-third of both groups do not worry about nutrition when they eat out.



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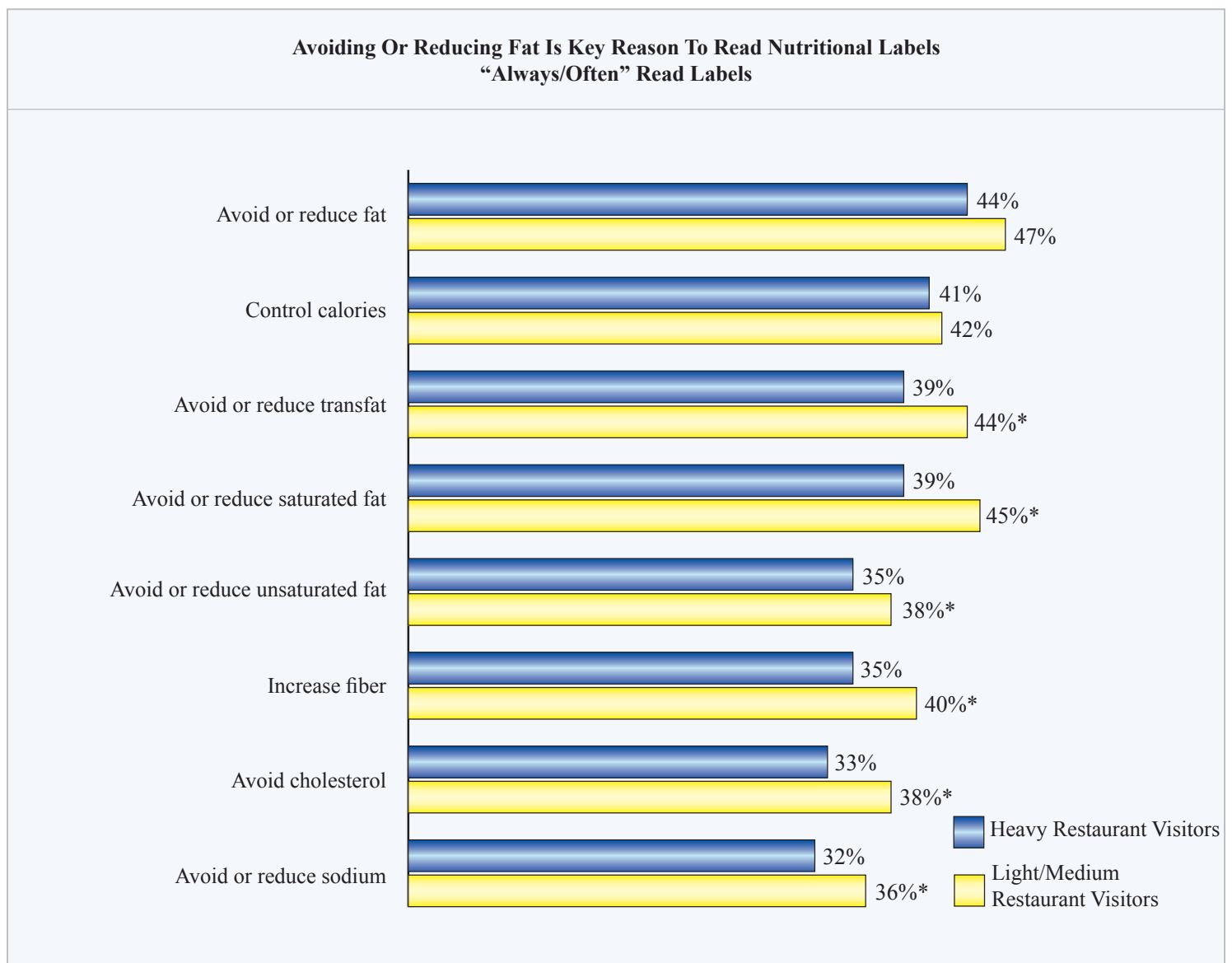
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How Restaurant Visitors Use Nutritional Labels: Avoidance Or Control?

What value do consumers place on nutritional labels on fast food menu items and nutritional information provided by restaurants? How do restaurant visitors use nutritional labels on product packages in general?

Almost one-half of both segments “always” or “often” read nutrition labels to make product decisions. Medium/Light visitors are more enthusiastic label readers. Avoiding or reducing fat is a primary reason for label reading, with avoidance of saturated fats and transfat coming out ahead of unsaturated fats for both segments.

Medium/Light restaurant visitors more actively read labels to increase fiber, to avoid cholesterol, and to avoid/reduce sodium compared to their heavier counterparts. These results are expected given the attention medium/light restaurant visitors devote to nutrition. This indicates restaurant nutrition labels may resonate well, at least with medium/light visitors.



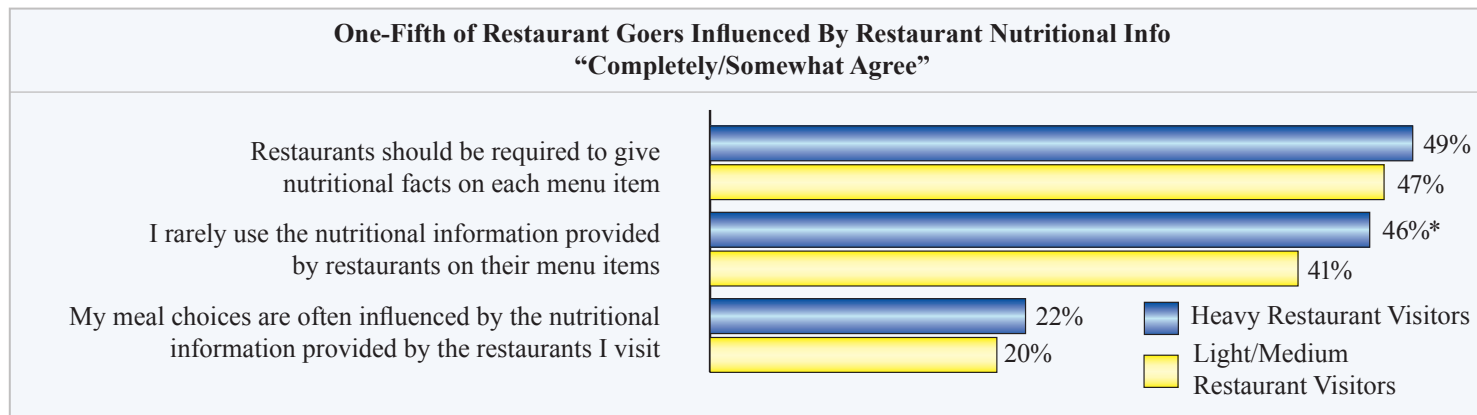
Question: How often do you use the nutritional information found on the labels or packages of food and beverage products to achieve each of the following purposes?

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Are Fast Food Labels And Restaurant Nutritional Information Accepted?

About one-half of visitors believe restaurants should be required to provide nutritional information on each menu item; however, more than four out of ten report they rarely use the information. One-fifth report meal choices are often influenced by this nutritional information.

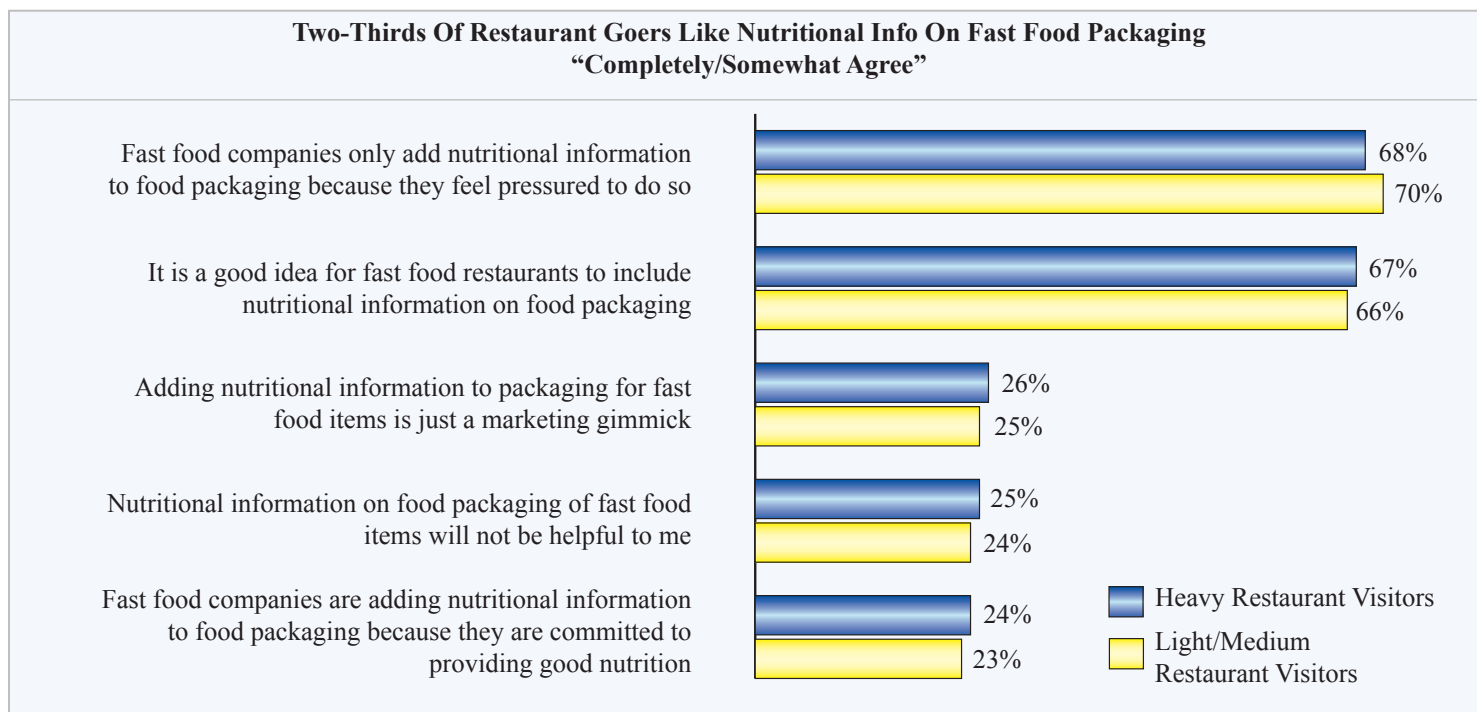


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About two-thirds of restaurant visitors believe it’s a good idea for fast food restaurants to include nutrition information on the packaging for menu items. A less enthusiastic group does weigh in, with one-quarter believing these labels are a mere marketing gimmick and one-quarter reporting that these labels would not be helpful. One-quarter of restaurant visitors believe fast food companies are promoting good nutrition, while about seven out of ten believe these restaurants felt pressured to do so.



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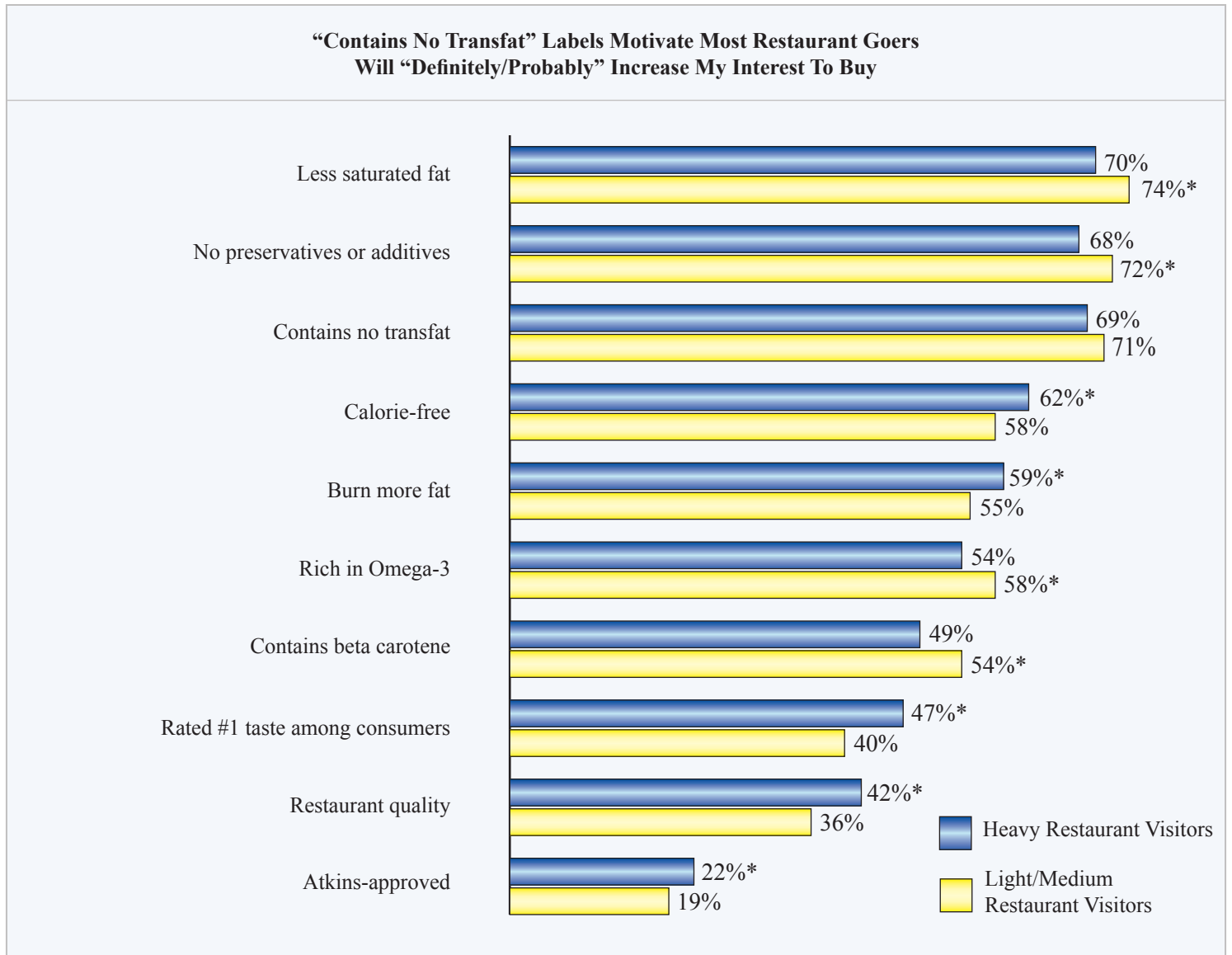
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So what does this mean? Four out of ten don’t use the nutritional labels, but one-fifth of both segments report their meal choices are often influenced by them. The hypothesis is a sizable segment like the idea of having this information available and could eventually view it as “cost of entry,” with a core group using this information regularly.

Compelling Nutritional Claims: “Keep Talking Transfat”

A study of nutritional claims can assist restaurant marketers in creating more targeted messaging. Notably “contains no transfats” appeals equally to both segments, which bodes well for its inclusion in advertising.

Labels focusing on inclusion of nutritional positives and exclusion of nutritional negatives, such as “less saturated fats,” “no preservatives or additives,” “rich in Omega-3,” and “contains beta carotene,” appeal to medium/light restaurant visitors. Heavy visitors are more motivated by nutritional and nonnutritional benefits such as “calorie-free,” “burn more fat,” “restaurant quality” and “rated #1 taste” among consumers. “Atkins-approved” claims also get higher ratings among heavy visitors, which dovetail with their past 12-month participation in the Atkins diet.



Question: To what extent would each of these nutritional claims on a product label or package influence your interest in buying the product?

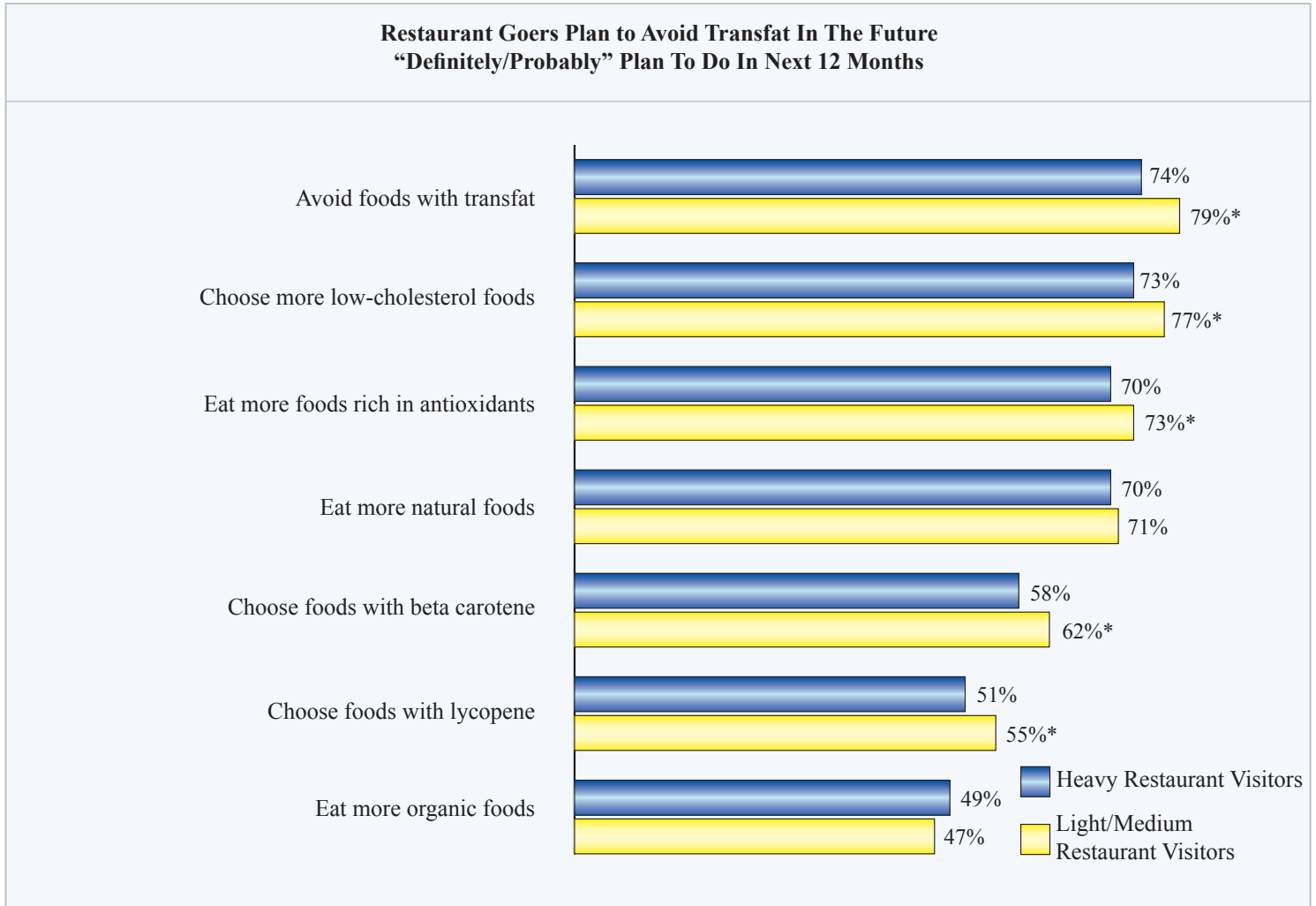
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Future Consumer Plans May Pave Way For Restaurant Marketers

The future plans of restaurant goers may assist in developing future marketing efforts and targeted messaging. Avoiding foods with transfat is a top objective for both restaurant segments. Although the emphasis is higher among the medium/light segment, eliminating transfats and communicating this step should remain a high priority for restaurants.

Natural foods appear to present a greater opportunity than organics as seven out of ten of both segments plan to eat more of these, compared to almost half of both segments who plan to eat more organic foods. Medium/Light visitors could be attracted by emphasizing the beta carotene and lycopene in restaurant items.



Question: Which of the following actions, if any, do you plan to take in the next 12 months to improve your health?

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Implications For Restaurant Marketers

- Appeal to the “nutritional guilt” among heavy restaurant visitors and “nutritional savvy” among medium/light visitors. However, both groups believe they know how to eat a healthy diet so any guidance will need to be positioned as a way to improve their lives and not necessarily as nutritional education.
- Medium/Light restaurant visitors will be more open to an emphasis on ingredients such as lycopene or beta carotene to reinforce their commitment to nutrition.
- Tailor menu offerings to meal and snack behavior while targeting the nutritional profile of heavy and medium/light visitors, such as a healthy late-night, “on-the-go” snack or nutritious breakfast items.
- Understand there will be a segment which will likely never use nutritional information or consume healthy menu items, but the presence of the “health halo” likely puts the restaurant in a positive light or might even be viewed as a “cost of entry.”
- There is a small “purist” segment that will not visit a restaurant unless it offers healthy menu items. While not a large marketing target, it still is a core segment which deserves attention.
- The emphasis on the removal of transfat seems productive as restaurant visitors are reading labels to avoid transfat and have made avoidance a key health objective.
- Restaurant visitors may be more open to natural foods than organics and represent an opportunity to present menu items as natural or fresh.

Background And Methodology

The Health and Nutrition Strategist™ syndicated database has more than 8,500 data points on food and beverage consumption, restaurant usage, health habits, and nutritional attitudes. These insights were collected from Decision Analyst's American Consumer Opinion® online panel on a continuous basis starting in January 2006 using a nationally representative statistically balanced sample of 4,156 American adults. The margin of statistical errors is less than two percentage points, plus or minus, at a 99% confidence level.

About Decision Analyst

Decision Analyst is a global marketing research and marketing consulting firm founded in 1978. The Health and Nutrition Strategist™ is a strategic knowledge base to support Decision Analyst's research and consulting for the food, beverage, pharmaceutical, and nutritional supplement industries.

If you would like more information about The Health and Nutrition Strategist™, please call (817) 640-6166.



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