StrategyOne

PUBLIC OPINION REPORT

The US Consumer Relationship with Food and Expectations from Farm to Fork

THE QUESTIONS

Our research posed three (3) basic questions:

1. "Which ONE of the following best describes the way in which you primarily think about food in your life?"

	Total
A means of health	23%
A way of connecting with friends and family	18%
A source of fuel	15%
A display of love for those I cook for	12%
A sense of pride in the food I prepare	11%
A duty or obligation to provide food for others	7%
A sense of culture	4%
A celebration	3%
Guilt	1%

2. "How important is it to you that each of the following food sources have specific initiatives focused on health, wellness and nutrition for people consuming their products?"

	% Somewhat or Very Important
Supermarkets	91%
Food producers, such as farmers and ranchers	90%
Packaged food companies	83%
Casual dining restaurants	81%
Fast food companies	68%

3. "How important is it to you that a food company have each of the following types of initiatives?"

	% Somewhat or Very Important
Provide healthy foods that also taste great	94%
Offer more healthy food choices	92%
Provide easily accessible nutrition information for their products	92%
Work to help solve community nutrition problems, such as childhood obesity and malnutrition	89%
Provide easy-to-use nutrition information on the front of food packages	88%
Use fewer ingredients in their products	75%

US CONSUMER RELATIONSHIP WITH FOOD AND EXPECTATIONS FROM FARM TO FORK

BY: JASON MCGRATH

As food and nutrition take center stage in the White House with Michelle Obama's initiatives from fighting childhood obesity to the White House organic garden, many have focused on the foods we eat as a cause of the obesity epidemic in the US. What is commonly overlooked, however, is our personal relationship with food, and how this impacts what we eat, where we eat, when we eat, and how we eat.

StrategyOne explored these attitudes and opinions among US consumers to gain a better understanding of the relationship American's have with food, and what their expectations are of food producers, food companies and restaurants.

FRAGMENTED SEGMENTS OF CONSUMER OPINION

While a common expectation might be that food is primarily viewed as either a source of fuel or sustenance, or a means of health, the data is clear that there are widely divergent relationships between consumers and their food.

- Health

'A means of health' is the most prominent way in which Americans think about food in their life, but this opinion is held by only 23% of American adults. This 'Grains & Greens' segment of the US population is likely to be those that we would associate with organic foods, less processed options, and a tendency to shop locally at farmers markets. As the results below show, this health relationship with food becomes more prominent with older Americans, those 55 and older. Interestingly, this percentage of health conscious individuals increases among those who are divorced (34%).

Which ONE of the following best describes the way in which you primarily think about food in your life?		Gender		Age				
	Total	Male	Female	18-34	35-44	45-54	55-64	65+
A means of health	23%	22%	24%	18%	19%	26%	31%	30%
A way of connecting with friends and family	18%	16%	20%	23%	18%	13%	12%	19%
A source of fuel	15%	19%	11%	17%	18%	15%	11%	14%
A display of love for those I cook for	12%	9%	16%	9%	11%	20%	13%	11%
A sense of pride in the food I prepare	11%	13%	9%	11%	11%	8%	14%	10%
A duty or obligation to provide food for others	7%	8%	7%	9%	11%	6%	4%	5%
A sense of culture	4%	4%	4%	5%	5%	3%	3%	1%
A celebration	3%	4%	3%	4%	3%	3%	3%	3%
Guilt	1%	1%	1%	1%	2%	1%	2%	0%

- Connecting

The ‘Community Cooks’ in our sample, those that primarily think of food as a way of connecting with friends and family, tend to be younger than average. This is interesting given the level of interaction that has become impersonal as Facebook, Twitter and other online social networks become the predominant means of communication. While life becomes more digital, it appears that the younger generation still places a high-level of value on down-time to enjoy a meal with others. This opinion of food is also more predominant among families with children in the home (21%) versus those without (15%).

- Fuel

Not surprisingly, 19% of males (versus only 11% of women) have a more performance-oriented relationship with food, and view it primarily as a source of fuel. This third largest segment, those we call the ‘On-the-Go Eaters,’ round out the top three ways in which individuals in the US think about food, however it is clear that the common perception of food as fuel and nutrients only represents a small percentage of the total US population.

- Love

The opinion that food is a way to display love and affection for those we care about can be seen in many aspects of life, either associated with a romantic dinner out, or perhaps a quiet evening at home cooking for someone special. 12% of the US population primarily think of food as a display of love for those they cook for, and this is more predominantly among women (16%) than men (9%).

HEALTH, WELLNESS AND NUTRITION RESPONSIBILITY

When it comes to expectations of responsibility from various food sources the American public relies on daily, it should come as no surprise that US adults expect health, wellness and nutrition initiatives from each type of company and producer. What is surprising, however, are the high expectations placed on the extreme ends of the food chain as opposed to processors and food preparers. 91% of Americans say that it is somewhat or very important for supermarkets to have specific health, wellness and nutrition initiatives, and 90% say the same of food producers, such as farmers and ranchers. While packaged food companies and restaurants are still expected to have specific initiatives, it is evident that these consumer expectations are now expanding to the far ends of the food chain.

How important is it to you that each of the following food sources have specific initiatives focused on health, wellness and nutrition for people consuming their products? (% Somewhat or Very Important)		Gender		Age				
	Total	Male	Female	18-34	35-44	45-54	55-64	65+
Supermarkets	91%	88%	94%	87%	95%	93%	92%	93%
Food producers, such as farmers and ranchers	90%	88%	91%	90%	93%	93%	87%	85%
Packaged food companies	83%	81%	85%	82%	89%	85%	82%	78%
Casual dining restaurants	81%	81%	81%	79%	85%	77%	84%	82%
Fast food companies	68%	69%	68%	66%	72%	68%	73%	67%

Interestingly, the companies that are often cited for providing some of the least healthy foods available to consumers are those that consumers expect the least from. However, over two-thirds of US adults say that it is still somewhat or very important for fast food companies to have specific initiatives in health, wellness and nutrition for their consumers. While many of these companies have already made significant strides in providing healthier fare, it is both an expectation from consumers, as well as proactive, good corporate citizenship on the company's behalf.

How important is it to you that each of the following food sources have specific initiatives focused on health, wellness and nutrition for people consuming their products? (% Somewhat or Very Important)	Segment			
	Health	Connection	Fuel	Love
Supermarkets	97%	89%	87%	98%
Food producers, such as farmers and ranchers	95%	91%	84%	96%
Packaged food companies	87%	81%	79%	89%
Casual dining restaurants	85%	82%	81%	80%
Fast food companies	75%	60%	62%	70%

Evaluating this data based on the food-relationship segmentation, we see that US adults that think of food primarily as a source of fuel have lower expectations for the food chain to provide these initiatives (as do those who view food as a means of connecting among certain food sources). This data is interpreted to mean that those who view food as fuel place more importance on the actual nutrients contained within the foods they eat instead of the specific initiatives a company has in health, wellness and nutrition.

In a time when the public focus is on American health and the obesity epidemic, with new attention towards organic growing methods (just look at the organic vegetable garden on the South Lawn of the White House, or outside the USDA), it is apparent US consumers are expecting more from their food. It is evident that we are seeing these opinion shifts throughout the food chain, and will continue to see increased initiatives in health, wellness and nutrition based on high public expectations.

FOOD COMPANY INITIATIVE IMPORTANCE

When it comes to specific initiatives, US consumers clearly want their low-calorie, low-fat cake, and want to eat it too. Consumers want foods that are healthy and taste great, they want more choice, and they want easily accessible information. While the importance for many of these initiatives is higher among females in the US, it is nonetheless important to both genders.

How important is it to you that a food company have each of the following types of initiatives? (% Somewhat or Very Important)		Gender		Age				
	Total	Male	Female	18-34	35-44	45-54	55-64	65+
Provide healthy foods that also taste great	94%	93%	95%	92%	98%	93%	94%	96%
Offer more healthy food choices	92%	89%	95%	91%	94%	91%	92%	95%
Provide easily accessible nutrition information for their products	92%	90%	94%	92%	91%	92%	91%	92%
Work to help solve community nutrition problems, such as childhood obesity and malnutrition	89%	85%	92%	91%	88%	90%	88%	88%
Provide easy-to-use nutrition information on the front of food packages	88%	84%	92%	84%	85%	90%	90%	94%
Use fewer ingredients in their products	75%	73%	77%	73%	77%	76%	74%	77%

The lowest level of importance is placed on ingredient reduction in the food products available today, however three-fourths of consumers still see this as an important initiative that many food companies are starting to place on supermarket shelves.

How important is it to you that a food company have each of the following types of initiatives? (% Somewhat or Very Important)	Health	Connection	Fuel	Love
Provide healthy foods that also taste great	96%	98%	92%	98%
Offer more healthy food choices	97%	93%	91%	95%
Provide easily accessible nutrition information for their products	95%	91%	89%	94%
Work to help solve community nutrition problems, such as childhood obesity and malnutrition	91%	88%	87%	95%
Provide easy-to-use nutrition information on the front of food packages	95%	89%	83%	94%
Use fewer ingredients in their products	80%	77%	65%	84%

A similar pattern emerges with regard to the segments and the specific initiatives they value from food companies, with the highest importance on healthy options, taste and choice, and less on front-of-pack labeling, solutions for community problems and ingredient reduction. It is important to note that the majority of consumers expect all of these, but that there are priorities in the consumer mind.

CONCLUSIONS

1. While food marketers continue to place an emphasis on the nutrients contained within (or those excluded from) their products, it is important to understand the relationship that Americans have with the food they eat. Food is clearly not just a source of fuel or means of health, but is a part of family memories, traditions and love. Emotional appeal with regard to nutrition and health will help to strengthen brands.

2. Consumers expect food producers, food companies, restaurants and supermarkets to have specific initiatives focused on health, wellness and nutrition now more than ever. With a considerable policy focus in Washington, DC on food production and the US obesity epidemic, companies cannot just communicate clear, consumer-facing initiatives, but must also engage with their customers.

3. Regardless of the relationship consumers have with food, there is still a high level of importance for companies from the field to the fork to have specific initiatives in health, wellness and nutrition.

4. The specific initiatives that are most important for food companies to provide to US consumers are:
    a. Providing healthy foods that also taste great
    b. Offering additional healthy food choices in a product portfolio
    c. Providing easy access to product nutritional information

METHODOLOGY

From January 29th to February 1st, 2010, StrategyOne conducted 1,000 telephone surveys among US adults age 18 and older. The data was collected by random-digit dialing and weighted to be representative of the US population based on age, gender, geographic region and race.

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