

WHO MADE ME FAT? SEEKING ANSWERS TO COMPLEX QUESTIONS

IT IS NO LONGER NEWS THAT OBESITY IS A WORLDWIDE EPIDEMIC, NOT ONLY IN THE "AFFLUENT" COUNTRIES OF THE UNITED STATES, CANADA, AND EUROPE, BUT IN NEWLY DEVELOPED AND DEVELOPING COUNTRIES AS WELL. NOT A DAY GOES BY IN THE U.S. WITHOUT ANOTHER STORY IN THE MEDIA ABOUT SOME ASPECT OF THE OBESITY CRISIS.

Obesity is one of the least understood and most complex health issues facing society today. Its pathophysiology is not yet understood. Its social and emotional ramifications are enormous. In the United States there are differing views about the cause of obesity. Many believe that overweight people are simply lazy and excessive. But others argue persuasively that genetic predispositions, a shift toward sedentary work and play, and the marketing practices of food, beverage and restaurant companies greatly contribute to the problem.

Regardless of what one sees as the cause of obesity, corporate America needs to pay close attention to the growing concern being generated around this issue.

- If people believe that weight control is primarily a personal responsibility and become successfully motivated to act on that belief, American eating habits will change dramatically.

- If people believe that the foods provided by corporate America combined with the mass shift toward sedentary work are responsible, they will

demand government intervention and corporate/employer accountability.

Either way, the signals are indicating that a significant change in eating patterns may be on the horizon.

WHAT DOES AMERICA THINK NOW?

In April 2003, WirthlinWorldwide conducted an attitudinal survey to learn how Americans view their current state of health, particularly with regard to their weight. Slightly more than one-fourth of Americans (27%) believe that their overall health is worse than it was three years ago. Almost one-third (32%) of those surveyed believe that others see them as overweight. Almost four out of five (79%) say that the problem of obesity is "extremely serious" or "very serious."

Asked what contributes to their overall health and well-being, Americans say the three most important factors are #1 their diet, #2 a healthy weight, and #3 exercise. These findings indicate that a significant number of Americans are cognizant that diet and weight are critical components of health

HIGHLIGHTS

1 **What Does America Think Now?**

Americans feel that the problem of obesity is a serious one.

2 **The High Cost of Obesity and Overweight**

Obesity and related illnesses in the U.S. alone account for as much as \$92.6 billion annually in medical bills.

Where Does Accountability Lie?

A changing food environment is partially responsible.

3 **Conflict of Choice**

Lifestyles affect American's ability to live healthy.

What We Expect of Others

Americans look to government and industry for help.

4 **Trans Fats — A Harbinger of Things to Come?**

Denmark legislates. Will the U.S. Food and Drug Administration follow suit?

How Can Corporate America Respond?

Companies need to be allies in the fight against obesity.



“The standard size for soft drinks for many years was an 8-oz portion. Now the minimum portion is 12-oz, with many consumers preferring 16 to 20-oz sizes for an individual serving.”

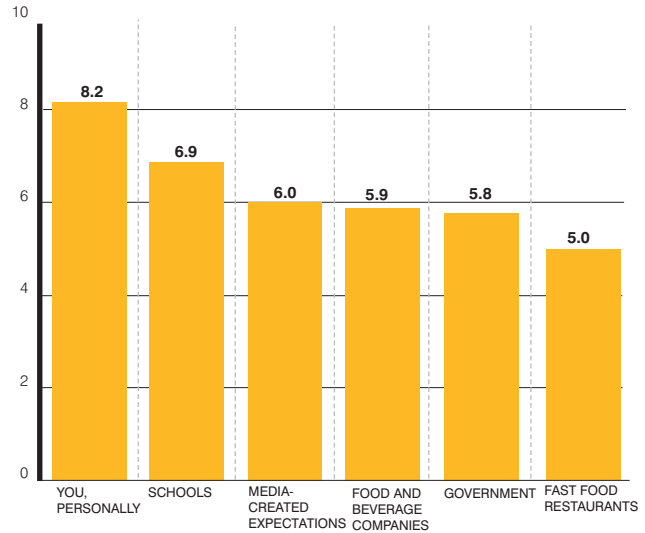
and that their own diet and weight are having adverse effects on their health.

The actual data show that more Americans are overweight than think they are. In its latest annual report, *Health, United States, 2002*, the Centers for Disease Control and Prevention (CDC) estimates that 64 percent of U.S. adults (age 20+) are overweight, defined as having a body mass index (BMI) of 25 or above. And nearly half of these, 30 percent of all American adults, are classified as obese (BMI 30 and above).

Perhaps this fact best sums up the extent of the problem: After cigarette smoking, obesity is now the second leading preventable cause of death in the United States. (see Allison, DB, et al. *Annual Deaths Attributable to Obesity in the United States*, JAMA 282 (16): 1530-8, 1999 and *Physical Activity and Good Nutrition*, CDC, 2003)

Who Is Responsible For My Health?

QUESTION: Using a 10 point scale, where a "1" means "NO RESPONSIBILITY AT ALL," and a "10" means "TOTAL RESPONSIBILITY," please tell me how much responsibility each of the following people or organizations should have for helping Americans to be healthy.



THE HIGH COST OF OBESITY AND OVERWEIGHT

A newly-published study in *Health Affairs* undertaken by RTI International and the CDC reports that obesity and related illnesses in the U.S. alone account for as much as \$92.6 billion annually in medical bills, with taxpayers paying about half that amount through the Medicare and Medicaid programs. The authors of the study also found that the United States spends as much money on obesity-related ills as on conditions related to smoking. They argue that government and health insurance companies should offer incentives to help people lose weight.

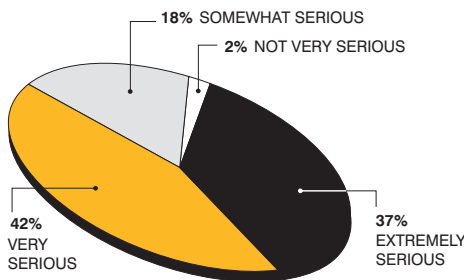
changing food environment that offers greater product selection in supermarkets and greater availability of pre-packaged foods, soft drinks, and fast food restaurants.

The CDC cites the increase in portion sizes as another major contributor to America's obesity problem. For example, the standard size for soft drinks for many years was an 8-oz portion. Now the minimum portion is 12-oz, with many consumers preferring 16 to 20-oz sizes for an individual serving. This trend is also evident in the prevalence of "biggie-size" options at fast food restaurants.

The consuming public agrees. In a Wirthlin study last year, conducted for the American Dietetic Association, 44% of people indicated that restaurant portions have become much larger in the last few years. They also say that when the restaurant meal is larger than they want, 7% eat it

How Big of a Deal?

QUESTION: Based on what you may have read, seen or heard, how serious a problem is obesity in America?



44%

OF AMERICANS THINK THAT RESTAURANT PORTIONS HAVE BECOME MUCH LARGER IN THE LAST FEW YEARS.

WHERE DOES ACCOUNTABILITY LIE?

The CDC partially attributes America's weight gain to a

all anyway, while 65% take it home with them to eat later.

In our April survey, consumers indicated on a scale of 1 to 10 how much responsibility they believed different individuals or organizations should have for helping Americans to be healthy. (1: no responsibility, 10: total responsibility).

Results show that, despite the fact that most respondents place responsibility on themselves, consumers also want business and government to help them choose good diets and to live healthier. These views are even more prevalent among lower income and less educated consumers, the same groups that are often the most frequent customers for convenience foods and quick service restaurants.

Still, the formula for weight control seems simple enough: Eat less, exercise more. So why aren't more people addressing their size issues in a planned, decisive fashion?

Perhaps the biggest reason is that planning and foresight are not the American way. We are a nation of spontaneous and impulsive people who tend to think short term rather than long term. We do not easily delay gratification for the greater long-term good.

"Americans are driven by convenience," comments Steve Bodhaine, leader of WirthlinWorldwide's Healthcare and Pharmaceutical Consultancy. "Having a healthy body takes planning and discipline, not attributes Americans are known for."

CONFLICT OF CHOICE

When we asked survey respondents who should have the

most responsibility for helping Americans be healthy, nearly two-thirds (64%) responded, "I myself should." But what we expect of ourselves may be unrealistic. We expect to do it all—be stellar at work, as parents, as spouses, as citizens, and as neighbors. We know we should eat a better diet and get more exercise, so occasionally we try to make changes, but the many demands of daily life get in the way, and once again we are sacrificing nutrition for convenience.

Observing that Americans are highly aware of the health hazards of overweight, Steve Bodhaine comments, "Obviously awareness alone is not the answer. Facts and figures alone do not motivate. We need to effectively link the rational with emotional elements to drive a positive change in consumer behavior. Various groups are trying to persuade consumers with facts and figures, but consumers are not yet motivated to make healthful choices."

In addition, current American lifestyles seem to hinder the self-discipline required. The American workforce is populated by workaholics who believe that the longer and more intense the hours they spend at work, the better their chances of success. Many families have two parents in the workforce who still want to provide their children with all available opportunities offered by school and after-school activities. Busy parents and children alike, in the pressure of the moment, end up not paying attention to what or how much they eat. And the cycle continues.

WHAT WE EXPECT OF OTHERS

While most acknowledge personal responsibility for their own health, significant numbers of Americans are looking to government and industry to give them better tools for taking responsibility, such as:

1. Clear and accurate information about what constitutes a healthy diet. Current information is contradictory and confusing. Consumers become disillusioned when they learn that what was once touted as a healthy dietary practice is currently being questioned, even by "experts." A corollary to clear and accurate information is truth in advertising. Consumers do not want food advertisements or nutritional labeling to deceive by omitting important information.

2. Clear messages around portion size. Tara Parker-Pope in the May 20, 2003 Wall Street Journal reports that while the USDA defines one-half cup of pasta as a standard serving, the FDA considers one cup a standard serving. Meanwhile, restaurants typically serve three cups in a portion of pasta (equal to six servings in the Food Pyramid). Most people consider a "portion" to be the amount they can eat in one sitting. Therefore, the USDA recommendation for six to eleven servings of grains or breads sounds like more food than any one person can eat. Says



"Various groups are trying to persuade consumers with facts and figures, but consumers are not yet motivated to make healthful choices."
- Steve Bodhaine,
Healthcare
Consultancy Leader

64%

OF AMERICANS FEEL "I, MYSELF"
SHOULD HAVE THE MOST RESPONSIBILITY FOR HELPING AMERICANS TO BE HEALTHY

“It is clear that the challenge is greater than trying to match the convenience desired by consumers with foods that are somewhat healthier. The challenge is to become more socially responsible.”

Parker-Pope, "All this confusion means that people who are trying to eat right in order to lose weight and stay healthy are often making big mistakes in their food choices."

3. Consumers want food and beverage manufacturers to make healthier foods. The industry is responding in a variety of ways. A major snack manufacturer has reduced or eliminated trans fats from some of its top brands. Pre-seasoned and prepared fresh meats, poultry, and seafood, which facilitate quick preparation of healthy meals, are now available in supermarkets. Vegetarian products, bottled water, and organic foods grown without pesticides are a response to demands for pure foods and beverages. The popularity of nutrition bars continues to rise, with a fast emerging trend toward fruit and vegetable bars. All of these

responses provide nutritional value along with convenience.

4. Consumers want regulatory oversight that has some muscle. Recently Mark McClellan, Commissioner of the FDA, in a speech before the National Food Policy Conference stated, "Advertising's effects on food choices as part of an overall diet must be identified more effectively." The question is whether the FDA has the budget to pursue such initiatives.

5. Finally, consumers want clear, consistent, forceful help for healthy diets from the government, schools, and the media. This includes school meal programs that follow the best nutritional guidelines available. UK schools have come a long way in providing healthy foods for students, but many American schools are giving students less than optimal food choices.

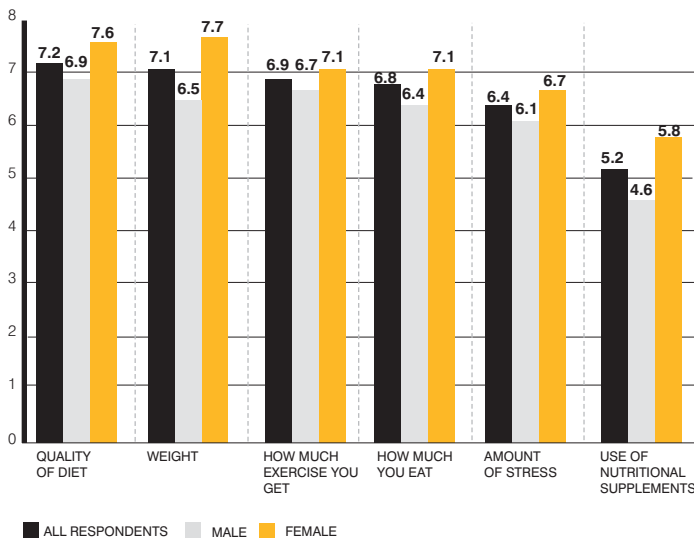
From nagging problems to legal actions, change is in the wind. It is clear that consumers are challenging American institutions not just to provide convenience foods, but to become more socially responsible in the areas of food products and food consumption.

generated vegetable oils containing trans fats. Deep fried foods such as French fries, potato chips, and similar snack foods are loaded with trans fats, as are commercially baked cookies, cakes, and stick margarine. All of these foods are pleasant to the taste but dangerous to the arteries.

The issue of trans fatty acids is an impassioned one, with consumer organizations on both sides of the Atlantic advocating tougher legislation. In June 2003, Denmark will become the first nation in the world to restrict the use of industrially produced trans fatty acids. From June 1, 2003 onward, oils and fat will be forbidden on the Danish market if they contain trans fats exceeding two percent. After December 31, 2003, the restriction will also apply to oils and fats in processed foods. The new limit values will apply to both Danish and foreign manufactured products. The Danes are hoping that the European Union will follow Denmark's lead. The obvious question is when will the U.S. Food and Drug Administration, which has been planning labeling requirements on trans fats, follow suit?

Healthy Contributions

QUESTION: Please use a scale from 1 to 10 to rate how much each of the following contribute to your overall health and well-being. Let a "1" mean that it "DOES NOT CONTRIBUTE AT ALL," and a "10" mean that it "CONTRIBUTES A GREAT DEAL."



TRANS FATS—A HARBINGER OF THINGS TO COME?

One current lightning rod in the debate over nutrition and health is the issue of trans fatty acids. Trans fats, as they are also called, are found in hydrogenated vegetable oils. They are known to raise bad cholesterol (LDL) levels while possibly lowering good cholesterol (HDL)—just the opposite of what is healthy. The restaurant and food industries use significant amounts of partially hydro-

HOW CAN CORPORATE AMERICA RESPOND?

In the United States, food and beverage industries are facing a challenge similar to that of tobacco companies. Their most popular products often run counter to the health of the American people. Changes will be demanded; the questions are how soon and how extensive?

For many companies there may be opportunity in this cri-

sis to reposition themselves as allies in the fight against obesity. These companies can decide to take leadership, to position themselves as truly concerned about healthy food choices, and thereby capture a new and growing audience of concerned consumers. Or they can wait until the demon gets bigger and angrier. When they finally jump on the caboose of progress, they will be neither recognized nor lauded because new solutions are the work of leaders, not followers.

Regarding obesity in America and abroad, we suggest three key areas for corporate attention and focus.

1. *Identify how and to what extent the obesity issue might impact your business.*

Determine how and to what degree your company may be perceived as contributing to some aspect of the obesity problem. How many active allies do you have with regard to this issue? Where do you go to find resources? How many of your own resources are you willing to contribute to America's health?

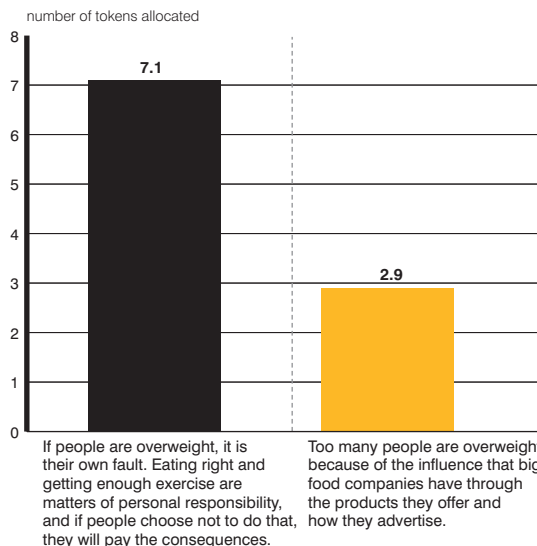
2. *Measure the extent to which your products and services may be viewed as contributing to or detracting from your customer's ability to achieve a healthier lifestyle/higher quality of life.*

How do your key stakeholders view you in this regard? Might your best interest call for repositioning your corporate persona either to solidify your already good image or to enhance it in terms of America's health? What efforts could you undertake with allies to enhance your image? What steps would be your first priority?

3. *Assess how your products*

It's a Matter of Personal Responsibility

QUESTION: I am going to read you two different viewpoints. After I read them, I am going to ask you how well each of them reflects your own opinion by having you allocate 10 tokens among the two statements. The more tokens you allocate to a particular statement, the more strongly you feel toward the statement.



and advertising messages (both verbal and visual) communicate regarding the issue of healthy lifestyles. Do you explicitly or implicitly motivate consumers to make unhealthy lifestyle decisions? Are you able or willing to modify your advertising, and perhaps your product offerings, in order to credibly persuade and motivate consumers to make healthier lifestyle decisions? If a lawsuit against your corporation were to bring about negative publicity, how might you manage the unfavorable exposure and its aftermath?

WirthlinWorldwide has helped many clients communicate more effectively by following this powerful formula: *persuade by reason, motivate through emotion.* Our award-winning values-based methods tap into the hearts and minds of the target audience to uncover decision-making

pathways that can be leveraged toward motivating personal choice in positive directions.

ABOUT WIRTHLIN WORLDWIDE

WirthlinWorldwide is one of the world's leading strategic opinion research and consulting firms.

Our approach is based on a value-building framework known as Strategic Equity Management™. Many of the world's top corporations and organizations look to WirthlinWorldwide to identify the strategic imperatives that will build measurable value for their enterprise, and consult with them on how to translate those imperatives into effective tactical action plans.

WirthlinWorldwide is a three-time winner of the prestigious David Ogilvy Research Award from the US Advertising Research Foundation, recognizing "outstanding contributions to the development of creative and successful advertising campaigns."

With a focus on marketing and communications strategy development, our range of services includes branding and positioning, advertising assessment, employee alignment, new product development, customer satisfaction, crisis management, Internet strategy and online research.

WIRTHLIN WORLDWIDE
HEALTHCARE CONSULTANCY

In addition to other areas of expertise, WirthlinWorldwide houses a Healthcare Consultancy with 25 years of experience with a wide variety of healthcare clients, including the Department of Health and Human Services, the American Diabetes Association, the American Heart Association, the American Cancer Society, the American Medical Association, the American Red Cross, the Cancer Research and Prevention Foundation, and the Council on Family Health. The Healthcare Consultancy offers customized solutions in communications strategy development and testing, stakeholder opinion studies, customer satisfaction measurement, corporate image assessment and development, program evaluation, crisis management, and sales force effectiveness.

SURVEY METHODOLOGY

This report contains selected results from WirthlinWorldwide's National Quorum telephone survey conducted from April 25 to 28, 2003. Interviews were conducted by telephone with a representative random sample of 1,000 adult Americans (age 18+) residing within the continental United States. The data were weighted by region, gender, ethnicity and education to be representative of the U.S. population. The margin of error for this survey is ± 3.1 percentage points.

For a complete report of this research, please contact Steve Bodhaine, Senior Vice President and Healthcare Consultancy Leader at 513-489-9000.

WirthlinWORLDWIDE 

RESTON, VA
(703) 480-1900

NEW YORK, NY
(212) 370-9096

CHICAGO, IL
(630) 472-9500

GRAND RAPIDS, MI
(616) 954-0200

SALT LAKE CITY, UT
(801) 523-2553

DETROIT, MI
(734) 542-1480

CINCINNATI, OH
(513) 489-9000

DALLAS, TX
(972) 818-5237

MANCHESTER, UK
(44-1663) 765-115

LONDON, UK
(44-207) 421-6110

BRUSSELS, BELGIUM
(32-2) 647-24-21

HONG KONG
(852) 2832-9707

SINGAPORE
(65) 6837-8670

Decision Making Information® for our clients around the world.

The Wirthlin Report is published monthly.
1920 Association Drive, Suite 500
Reston, Virginia 20191
Copyright © 2003, WirthlinWorldwide
www.wirthlin.com

To receive *The Wirthlin Report* via email
free of charge, send an email to:
report-list-subscribe@wirthlin.com