Innovation Health and Wellness Case Study

Quester thanks Bob Woodard, Partner
Deep Marketing Alliance

Case Study #3, May 2012
**Business Purpose**

Using a mixed methodology, develop an understanding of the evolution of young adults’ attitudes and behaviors relating to Health & Wellness from their inception (living at home with their parents) to when they’re out living on their own with the ultimate goal being to identify unmet needs and the nuggets of brilliance that can be leveraged for product innovation.

**Research Methodology**

The first step of our process involved six ethnographies (conducted by Fusion Marketing Power) to listen to and observe the targets to determine current unmet needs. The overall goal was to understand both what they “know” about health and wellness AND what they “do” based on that knowledge.

The second step involved 624 in-depth, one-on-one interviews conducted by Quester’s software moderator, Socrates. The purpose of this phase was to use psychiatric interviewing principals to uncover both the obvious and latent needs of consumers, and dive deeper into their intuitions as it relates to innovation. And in addition, provide quantitative backing.
Sample & Location

n=624
209 Young adults aged 16-18 who live at home with their parents
208 Young adults aged 19-24 who are living at college
207 Young adults aged 25-30 who are living out on their own

Note: This sample was US, English-speaking respondents only. Socrates also conducts interviews in Spanish, German, French, French Canadian, Portuguese, and Simplified Chinese.
As Young Adults age, their outlook moves beyond living in the moment to a “balanced” lifestyle that is the foundation for everything they do.

16-18 Year Olds
- They don’t deny themselves the foods they love
- They know what good nutrition is… even though it differs in its importance to them
- Females are more likely to be guided by the good habits they grew up with
- Males are more likely to ignore those habits – fast food is nirvana
- Understand the connection between what you eat and how you look/feel; but males need to see it first

19-24 Year Olds
- Balance is emerging as a worthy pursuit
- They’re caught between adult “knowing” and youthful invincibility
- They’re not ruled by body image
- Exercise is often at the mercy of other priorities
- Females are more proactive in their approach

25-30 Year Olds
- Responsibility is a source of pride and motivation
- The concept of “balance” is all-encompassing and is the foundation for how they try to live their lives/make their choices
- They’re motivated by how a healthy lifestyle makes them feel… both physically and mentally/emotionally - and by projecting themselves into the not-too-distant future

Doing What I Love
Conceptually Holistic
All-in Future Focused
Their approach to food becomes more similar (and healthier)

**GUYS**

16-18 Year Olds

“Fast food is disgusting. Even if I’m out with my friends and they’re having it, I won’t eat it.”

19-24 Year Olds

“I try to buy healthy things - whole grains. But I don’t know how to cook, so that limits it.”

25-30 Year Olds

“I love to cook. To me, good nutrition is all about planning - about making sure you have good stuff on hand - and about balance.”

**GIRLS**

16-18 Year Olds

“I don’t really like salads or healthy foods at all - I don’t like the taste.”

19-24 Year Olds

“I look for protein. That’s really important to me. I snack on dried fruit, nuts, Greek yogurt - but sometimes, man, I just want a burger!”

25-30 Year Olds

“I’m trying to be more conscious about my food choices - but balanced. I let myself have what I want, but in moderation.”
Attitudes regarding diet and exercise become more positive as young adults age

<table>
<thead>
<tr>
<th>Age 16 to 18</th>
<th>Age 19 to 24</th>
<th>Age 25 to 30</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don’t think at all about what I am eating or drinking</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>I want to be more aware of what I am eating, but right now it is not that important to me</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>I think about most things I eat and drink because having healthy eating habits is important to me</td>
<td>53%</td>
<td>55%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age 16 to 18</th>
<th>Age 19 to 24</th>
<th>Age 25 to 30</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don’t really think about how much exercise I need and do not do much</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>I exercise for fun, doing things like organized sports, but it is more for recreation</td>
<td>41%</td>
<td>30%</td>
</tr>
<tr>
<td>Exercise is an important part of my life and I make sure I do it regularly</td>
<td>35%</td>
<td>48%</td>
</tr>
</tbody>
</table>
Eating Healthy is a Balancing Act

Young Consumers know what they should be doing/avoiding but because of factors like Cost and Taste, they don’t!

* Percentages based on entire discussion, open-ended topics
Peeling Back the Layers

“\text{I am well-aware of how terrible fast food is but indulge out of convenience or shameful cravings pretty regularly.}”

**It's Hard Work! 52\%**

- Don't Have the Will Power 31\%
- Busy / Don't Have Time 26\%
- Can't / Don't Cook Well 8\%

“All it's hard to find things that I enjoy eating that are healthy. I am not a great cook so to try to balance everything is difficult ... I guess I never learned and am not good at improvising meals. I think eating healthier would be easier if I could cook.”

**Emotional Impact**

- Hard to Break Habits 13\%
- Guilty 13\%
- Feel Lazy 15\%
- Angry at Myself 5\%
- Uncomfortable 8\%
- Unattractive 7\%

“I am disappointed by how little dieting and exercising I commit to. I am frustrated that I am stuck at a larger weight and sad that the effort is too hard for me to give at the moment.”

“When I eat badly I feel gross and bad about the choice I made.”
There is a Gap Between Knowledge and Behavior

<table>
<thead>
<tr>
<th>n=624</th>
<th>Know About Eating</th>
<th>Healthy Eating</th>
<th>What I Know</th>
<th>Actually Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruits and Vegetables</td>
<td>52%</td>
<td>39%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nutritional Content</td>
<td>56%</td>
<td>31%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sugar</td>
<td>31%</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fat</td>
<td>23%</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Protein</td>
<td>18%</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carbohydrates</td>
<td>14%</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calories</td>
<td>10%</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sodium</td>
<td>7%</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drink More Water</td>
<td>22%</td>
<td>34%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avoid Soda Pop</td>
<td>27%</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>More Fresh Foods</td>
<td>22%</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less Processed</td>
<td>16%</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Natural</td>
<td>9%</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organic</td>
<td>3%</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Think about your “diet”, what and how you eat. Talk to me about what you know or have been told relative to what someone your age should be eating (good foods/drinks), avoiding (bad food/drinks), etc. Focus not on what you do, but on what you know. Please be as detailed as possible.

• Now let’s talk about what you actually DO when it comes to health and wellness. So talk to me about what you are thinking about when deciding what to eat and drink … everything from how many times a day you eat, snack … what foods/drinks you try to consume a lot of … what foods/drinks you avoid, etc. Really paint me a picture.
So, what do they want?

They want you to be accountable for them!

1. Because they don’t have the will power.
   - “So many unhealthy choices are available. It’s hard to keep myself from consuming them. I don’t have the will power, I wish I did.”
   - “I find it hard to resist eating things in moderation. I have to finish the whole thing instead of eating a little bit or half.”

2. Because it is too hard to always know what the health aspects are.
   - “It is hard to know what is really healthy these days.”
   - “I love when restaurants have nutritional data available on the menu. I also like lighter fare sections. I mean it’s easiest to use nutritional data if it is right on the menu.”

Make it easier! Give them knowledge!
Consumer Intuition

Help Me Be Healthier When Dining Out 30%

Menus 22%

Make a completely separate menu for healthy options - Offer a choice of menus, don’t even give them the other one

“Make foods that benefit everyone people who don’t like to eat healthy and those who strive to I think there should be a separate menu to explain what’s in each food item.”

“Put out two menus. One everyday menu and a Healthy Eating Menu. It’s not that much to ask. It’s hard to look at a regular menu and not just order what looks good. A separate menu would take some of the temptation away by not having to look at all the Hi-Cal stuff. The hostess can ask you when you come in which menu you prefer. Don’t even give me the other one.”

Teach them the better options - List the nutritional information such as calories, fat, etc. for each dish

“If all restaurants had to put the calories on the menu. I’d have a hard time eating something with lots of calories … If on the menu it described the food option then put how many calories it was I would use that to figure out what meal I would want.”

Show pictures of all the healthier meals on the menu and make it stand out – images are linked to taste perceptions

“List everything in terms of calories, fat, carbs and show pics. Foods are made to look edible and extremely well made. The appearance of food is what draws one to eat it.”
Consumer Intuition

Help Me Be Healthier When Dining Out 30%

Portions 11%

Help them control the portions ... Shrink the portions OR a la carte menu OR make it clear there is an option to box half the meal up before it is even brought to the table.

“The country is overweight because people keep increasing portion sizes in restaurants and other places. Actually post an a la carte menu so that people can order what they want in smaller portions. What if I don’t want a full meal. What if I’d love to have one of the foods options but I don’t want everything that comes with it. I love restaurants that have the 'mix and match' or the 'create your own meal' options.”

“Stop forcing huge portions on the masses. Better quality food in smaller portions could really change the obesity issue in America. Smaller portions in restaurants would make me less tempted to stuff my face.”
Consumer Intuition

**Make Shopping & Cooking Easier 29%**

**Shopping 15%**

Provide **online shopping lists** based on meal plans for the week; or at shelf with main ingredient products

“It's really hard to know what food to make every day. I'd like if someone just made me a shopping list for all my meals and made sure it didn't cost too much.”

“Shopping is a challenge. I don’t always have time to make a list so I default to quick and easy things when I am at the store. Maybe shopping lists on websites or shopping list that hangs on shelves.”

**Instruction 10%**

Provide **specific cooking instructions** with products, including produce – like how to cook broccoli or how to make healthier foods more flavorful

“I also don’t know how to cook too well and I often go for something already made instead of buying fresh food. I do know that eating vegetables is very important as part of a balanced diet and I am now making more of an effort to try and continue eating different vegetables.”

“I just learned how to steam broccoli LAST NIGHT. It would be helpful to learn more about how to cook all kinds of vegetables and what dishes each would be good in. I want to train my taste buds to crave veggies and fruits not chocolate and fries.”
Consumer Intuition

Make Shopping & Cooking Easier 29%

Recipes 7%

Make simple recipes more accessible at the store; not on product, but at shelf, store display; also online

“I think it would make things easier if I would eat more vegetables I like or learn how to make them more tasty without making them fattening. It would be easier if I could find healthy recipes that would include a lot more vegetables and make them a lot more enjoyable.”

“I would like to have a realistic guide that shows people how to have cook a healthy diet with what you find in a regular market no fancy things to add to your food.”
Case Study #3, May 2012