

Innovation Health and Wellness Case Study

Quester thanks Bob Woodard, Partner
Deep Marketing Alliance

Case Study #3, May 2012

Purpose & Objectives

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.

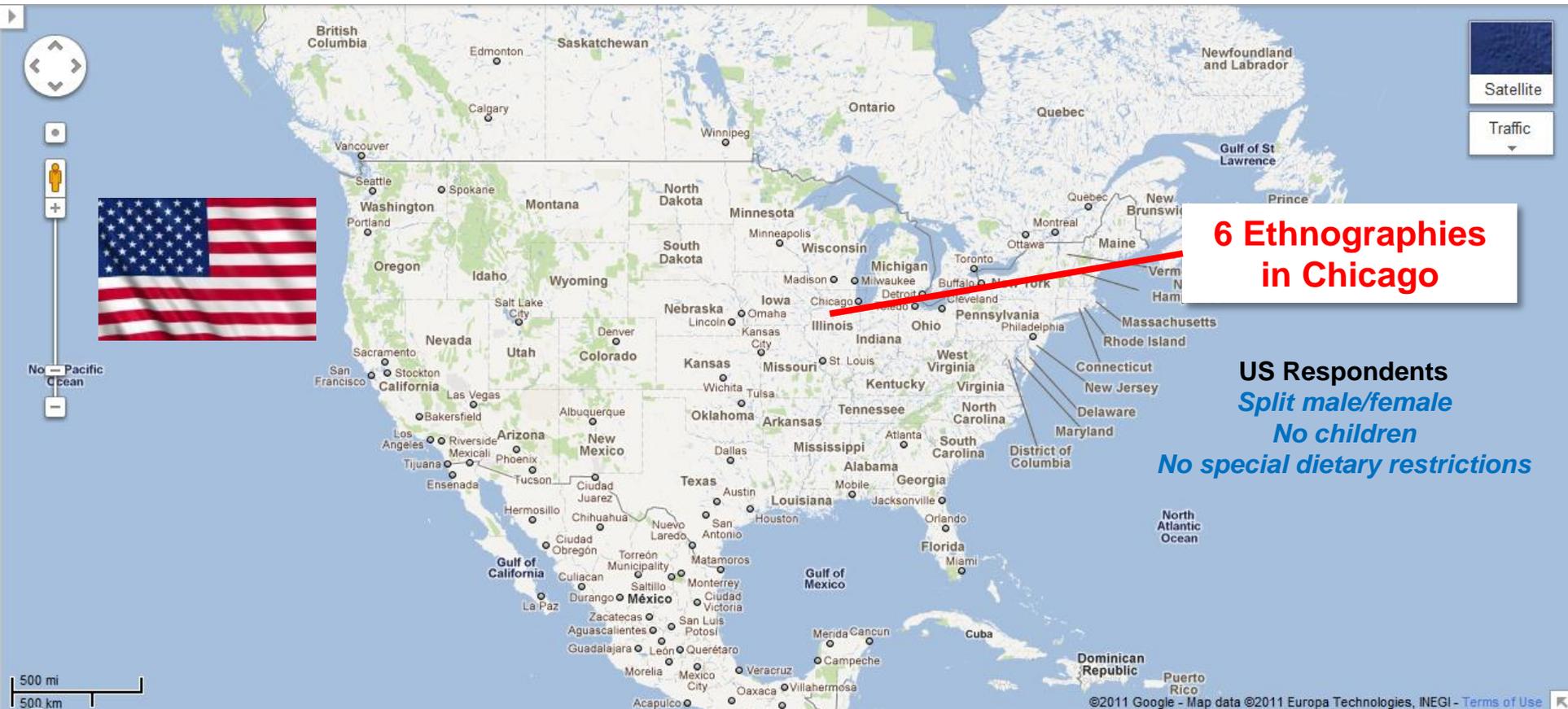
Sample & Location

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



**6 Ethnographies
in Chicago**

US Respondents
Split male/female
No children
No special dietary restrictions

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

Doing What I Love

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

Conceptually Holistic

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

All-in Future Focused



Their approach to food becomes more similar (and healthier)

GUYS

"I don't really like salads or healthy foods at all - I don't like the taste."



16-18 Year Olds



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

19-24 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."

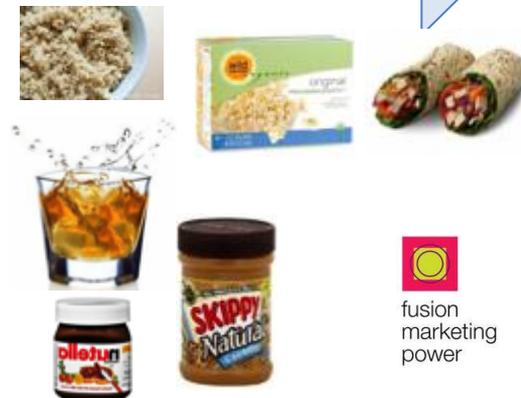
25-30 Year Olds

GIRLS

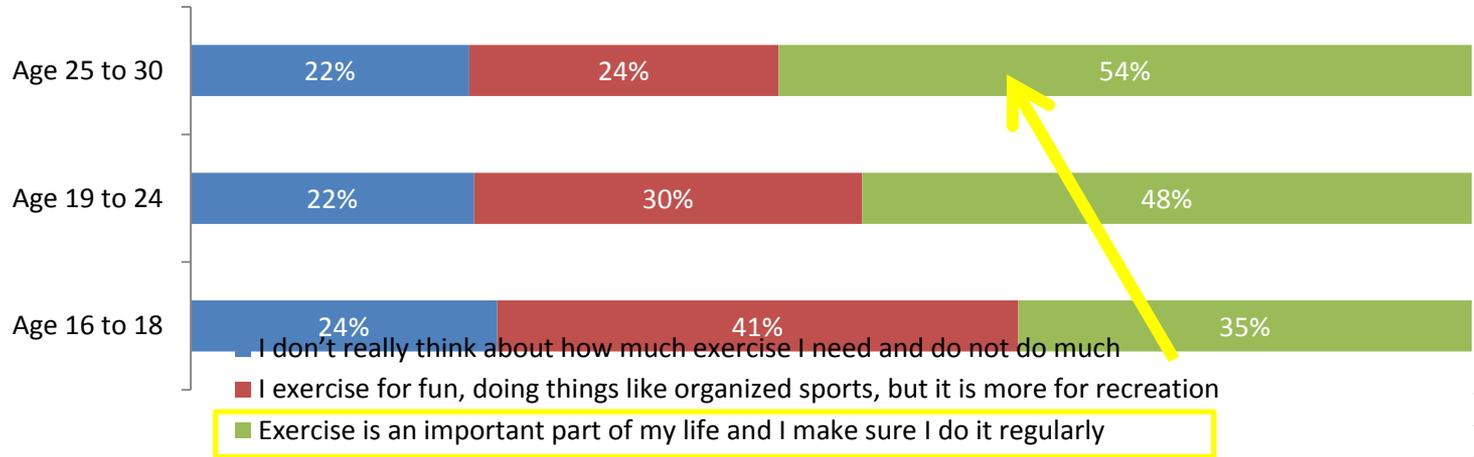
"I look for protein. That's really important to me. I snack on dried fruit, nuts, Greek yogurt - but sometimes, man, I just want a burger!"



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



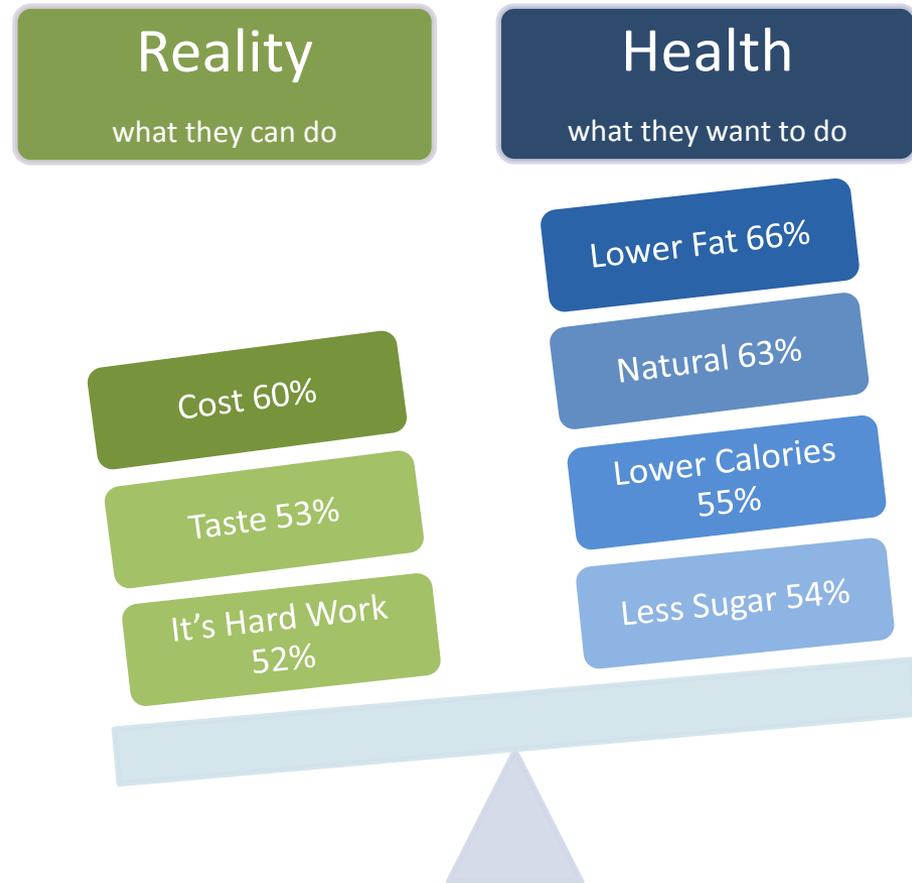
Attitudes regarding diet and exercise become more positive as young adults age



209 Young adults aged 16-18
 208 Young adults aged 19-24
 207 Young adults aged 25-30

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

"I am well-aware of how terrible fast food is but indulge out of convenience or shameful cravings pretty regularly."

Don't Have the Will Power 31%

Hard to Break Habits 13%

Busy / Don't Have Time 26%

Can't / Don't Cook Well 8%

It's Hard Work! 52%

"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

Guilty 13%

Angry at Myself 5%

Feel Lazy 15%

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



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

• 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."

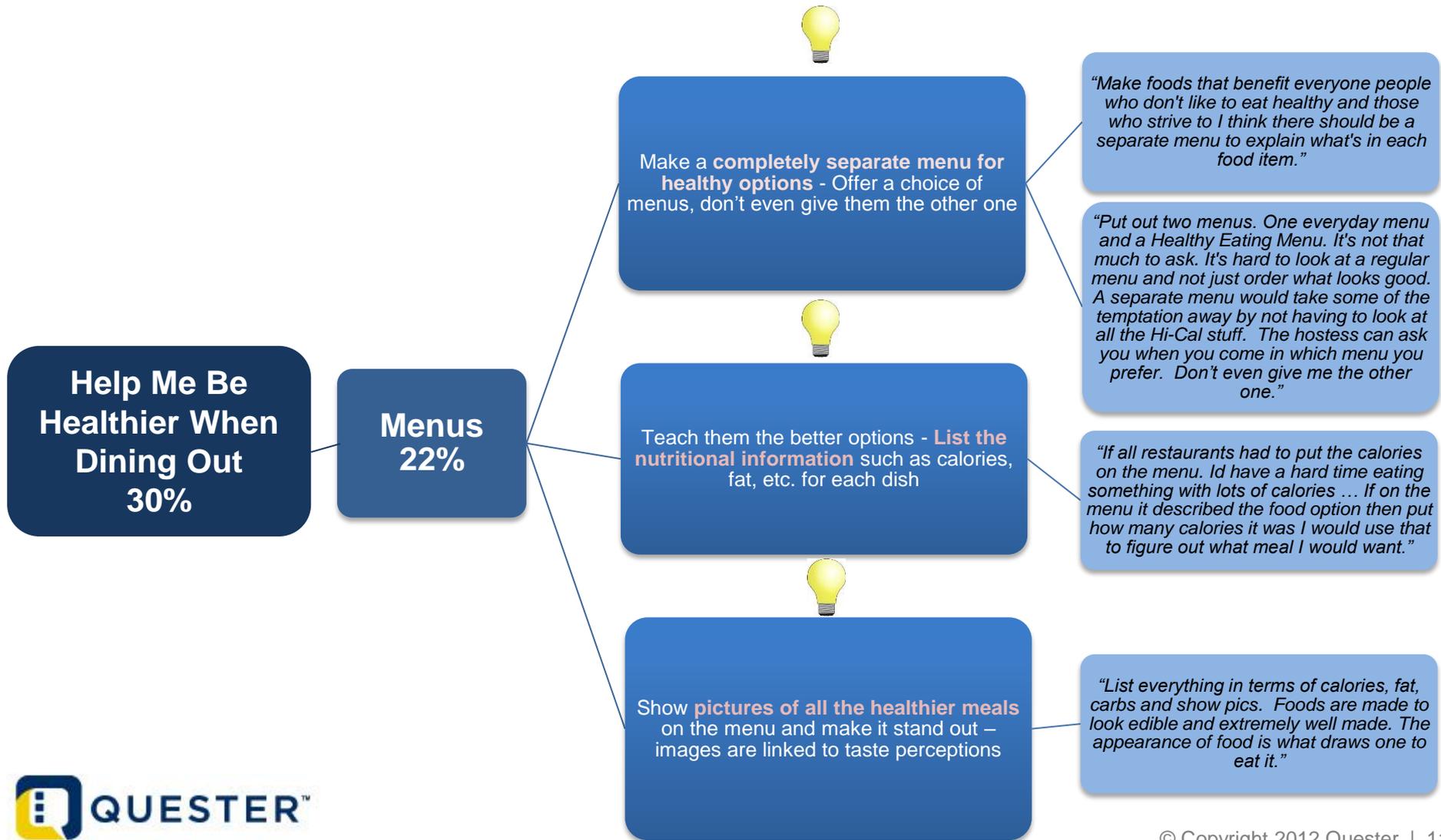
2 Because it is too hard to always know what the health aspects are.

"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



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



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."

For additional information

Contact us at info@quester.com or visit www.quester.com

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