The Latest Consumer & Innovation Trends in Weight Management

Tanvi Savara
Consumer Insight Analyst
Canadean

Food Matters Live
18th November 2015
Agenda

Consumer Profiles & Motivations

Consumer Approaches to Weight Loss

Global Innovation Snapshot

Conclusions
Three surveys annually

Over 50,000 respondents across 47 countries

Note: 27 countries via online mode, 20 countries via mobile mode
...and Innovation

- Track FMCG innovation in over 50 markets
- Discover trends and inspire new innovation
Consumer Profiles and Motivations
### Different Weight Management Intentions

<table>
<thead>
<tr>
<th>Category</th>
<th>Intentions</th>
<th>Global</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fat Fighters</td>
<td></td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Maintainers</td>
<td></td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>Gainers</td>
<td></td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Indifferent</td>
<td></td>
<td>14%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: Canadean’s Q2 global survey, 2015; Note: figures may not add up to a 100% due to rounding.
Profiling Fat Fighters

Consumers who are trying to lose weight, 2015

<table>
<thead>
<tr>
<th>Selected Markets</th>
<th>By Gender</th>
<th>By Age</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Developed</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Japan 52%</td>
<td><strong>49%</strong></td>
<td>41%</td>
</tr>
<tr>
<td>Spain 49%</td>
<td></td>
<td>42%</td>
</tr>
<tr>
<td>Sweden 48%</td>
<td></td>
<td>45%</td>
</tr>
<tr>
<td>US 47%</td>
<td></td>
<td>46%</td>
</tr>
<tr>
<td>UK 43%</td>
<td></td>
<td>44%</td>
</tr>
<tr>
<td><strong>Developing</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UAE 50%</td>
<td><strong>38%</strong></td>
<td>40%</td>
</tr>
<tr>
<td>Brazil 49%</td>
<td></td>
<td>41%</td>
</tr>
<tr>
<td>S. Arabia 46%</td>
<td></td>
<td>42%</td>
</tr>
<tr>
<td>China 39%</td>
<td></td>
<td>45%</td>
</tr>
</tbody>
</table>

Source: Canadean’s Q2 global survey, 2015 and Canadean’s next-generation emerging markets survey, 2015
Profiling Maintainers

Consumers who are trying to maintain weight, 2015

Selected Markets

Developed

- France 40%
- Singapore 38%
- Italy 35%
- UK 31%
- US 30%

Developing

- India 47%
- Kenya 46%
- China 41%
- Nigeria 41%
- UAE 35%

By Gender

- 33%
- 37%

By Age

- 31%
- 35%
- 36%
- 34%
- 36%
- 35%

Source: Canadean's Q2 global survey, 2015 and Canadean's next-generation emerging markets survey, 2015
Key Drivers Spurring Weight Loss

Health concerns

Fat fighters who are concerned about the following health issues

- Blood pressure: 31%
- High cholesterol: 25%
- Arthritis: 18%
- Diabetes: 15%

Visual culture

- 61% of fat fighters globally say their looks and appearance is important to them
- 28% claim to be very concerned about stretchmarks
- 32% claim to be very concerned about cellulite

Source: Canadean’s global survey, 2014
Consumer Approaches to Weight Loss
Wellness replaces short-term dieting

“\textit{What are you doing to lose weight?}”

- Exercising more: 60%
- Eating smaller portions: 52%
- Following a healthier meal plan: 52%
- Snacking less: 50%
- Eating "natural"/less processed foods: 25%

Replacing normal food and drink with diet food and drink: 11%
Following a specific dietary plan (e.g. Atkins): 7%

Source: Canadean’s global survey, 2013
“We were so closely linked to dieting. That’s not really where women are in America when they think about food today. They want health their way, with their own choices. And the brand wasn’t reflecting that.”

Julie Lehman, Lean Cuisine’s Director of Marketing, quoted in Digiday, October 2015
### Food Villains & Weight Management

**Global: Fat Fighters who think the following most likely lead to weight gain**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Carbohydrates</th>
<th>Fats</th>
<th>Sugars</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-17</td>
<td>52%</td>
<td>66%</td>
<td>62%</td>
</tr>
<tr>
<td>18-24</td>
<td>54%</td>
<td>67%</td>
<td>63%</td>
</tr>
<tr>
<td>25-34</td>
<td>52%</td>
<td>63%</td>
<td>71%</td>
</tr>
<tr>
<td>35-44</td>
<td>51%</td>
<td>63%</td>
<td>73%</td>
</tr>
<tr>
<td>45-54</td>
<td>51%</td>
<td>64%</td>
<td>73%</td>
</tr>
<tr>
<td>55-64</td>
<td>50%</td>
<td>64%</td>
<td>73%</td>
</tr>
<tr>
<td>65+</td>
<td>46%</td>
<td>66%</td>
<td>77%</td>
</tr>
</tbody>
</table>

**Average:**
- Carbohydrates: 52%
- Fats: 65%
- Sugars: 70%

Source: Canadean's global survey, 2013
Portion Control

Global: Fat Fighters who claim to eat and drink smaller portions “all” or “most” of the time, by age

- 18-24: 39%
- 25-34: 41%
- 35-44: 43%
- 45-54: 43%
- 55-64: 46%
- 65+: 50%

Source: Canadean's global survey, 2014

The Laughing Cow Mini Cravings Cheese

Goodnessknows Snack Squares

Source: Canadean's global survey, 2014
Natural Sweeteners

**Stevia**

53% of calorie conscious consumers familiar with stevia think it has a positive impact on health.

**Monk fruit**

60% of calorie conscious consumers familiar with monk fruit think it has a positive impact on health.

Source: Canadean’s global survey, 2014
Global Innovation Snapshot
1) Eating Like Caveman

The Protein Ball Co. Paleo Balls

“The perfect paleo snack”

“Each serving is 20% protein”

The Paleo Diet Bar

“Optimal nutrition bar for the hunter-gatherer lifestyle”

“Endorsed by Dr Cordain, founder of Paleo movement”

Inspiral Kale-Os Kale Crisps

“Raw, Paleo”

“Light as a feather and divinely crispy”

Source: Canadean’s Product Launch Analytics
2) Protein Branches Out

23% of fat fighters globally claim to eat as much protein as possible.

59% of fat fighters globally think protein is least likely to cause weight gain.

Jeetabix Protein
“Protein moving from the gym to the mainstream”
“Protein Crunch keeps you going all morning”

Lean Machine
“77 calories, 7g protein”
“For active adults looking for a full flavored, low calorie, and low carb beer”

Source: Canadean’s global survey, 2013 and Canadean’s Product Launch Analytics
3) Thick ‘n’ Thin

Oreo Thins

“The Oreo you love, now thinner”

Hula Hoops Puft

“Light and crispy”

“Around 100 calories less per serving than regular Hoops”

Snyder’s Pretzel Poppers

“With only 110 calories and 2 grams of fat per serving…these can be enjoyed guilt-free”
4) “Good for You” Carbs

Consumers who think the following have a positive impact on health

- US Fat Fighters: 58%
- Fat Fighters: 44%
- Ancient grains: 51%
- Ancient grains: 55%

Source: Canadean's Q2 global survey, 2015
5) Functional Indulgence

Innocent Chocolate

“Contains starch and sugar blockers (brown seaweed extract) and fat binding complexes (plant fiber cyclodextrin, FBCx) to prevent absorption of fats”

“0 net calories”
Agenda

1. Consumer Profiles & Motivations
2. Consumer Approaches to Weight Loss
3. Global Innovation Snapshot
4. Conclusions
Conclusions

Consumers are adopting a holistic approach to weight management. “Diet” foods and formal dietary plans are passé.

Emphasize wellbeing and positivity in messaging to help consumers reach their weight loss goals.

Portion control, natural foods, cutting back on snacking and following a healthier meal plan are key approaches consumers’ today adopt to lose weight.

Paleo diet, new protein formats, ancient grains, thin, lighter, crispier snacks and added functionality are key innovation trends to capitalize on.
Thank You

- tanvi.savara@canadean.com
- +44 (0)20 7832 4304
- tanvi_canadean