



Ultra-Processed Foods

What Are Consumers Really Saying?

Navigating the Ultra-Processed Food Challenge

Behavior-Focused Food Design

Making it easy for people to develop a healthy **habit** of using your product in specific moments in their lives.

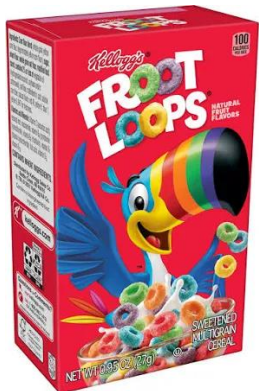


**How often do you consider the
level of processing when
making a food decision?**

(Always, sometimes, rarely, never)

Ultra-Processed

NOVA Food Classification System



Source: Carlos A. Monteiro, 2009

LIVE

FILE

FOX NEWS channel

DR. MARC SIEGEL | FOX NEWS MEDICAL COMMENTATOR

STUDY FINDS ULTRA-PROCESSED FOODS ASSOCIATED WITH HEART DISEASE, ANXIETY, AND EARLY DEATH

Ultra-processed foods

A global threat to public health

CONTENTS:

- What are ultra-processed foods?
- UPF consumption on the rise
- Health risks related to UPF consumption
- Environmental impacts related to UPFs

A revolution in food science and modern gastronomy over the last 60 years has led to explosive growth in the manufacturing and consumption of ultra-processed foods (UPFs). This shift began in high-income countries and has now reached countries of all income levels. UPFs are a substantial factor affecting worldwide trends in the prevalence and incidence of obesity and diet-related, non-communicable diseases.

T want fabulous hair!

The letters and diaries of Amy Winehouse

We're with you Jenni Hermoso' Spain's #MeToo moment

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The Guardian

Newspaper of the year

Ultra-processed foods causing a 'tidal wave of harm', say experts

New research revealing health risks described as a global 'wake-up call'

Andrew Green

as a "wake-up call" for governments worldwide. Global consumption of heavily processed items such as cereals, protein bars, fizzy drinks, ready meals and fast food has soared in recent years. In the UK, the average person consumes 10kg of ultra-processed food each year.

experts say exposes a "tidal wave of harm" being caused directly by UPF. Two large studies presented at the world's largest heart conference show that UPF consumption is linked to a 23% increase in the risk of conditions including heart disease, peripheral arterial disease, aortic aneurysms, kidney disease and vascular dementia. The second study, a gold standard randomised controlled trial, found that 10% of participants who reduced their UPF intake by 10% over 12 weeks had a 10% reduction in the risk of heart disease. The findings were revealed at the annual meeting of the European Society of Cardiology in London.

than 15% of their diet were least at risk of heart problems, according to the research led by the Fourth Military Medical University in Xi'an, China. The findings were revealed at the annual meeting of the European Society of Cardiology in London.

Decomplicated.

ULTRA-PROCESSED FOODS

INDEPENDENT tv

Inside the Fauci Wuhan Controversy

10.17.2023

Newsweek

TOXIC

FOOD

YOUR MEAL SHOULD COME WITH A WARNING LABEL. HERE'S WHY.

The Big Idea

Is Our Food Killing Us?

A primer for the 21st century

How is the social

conversation about

Ultra-Processed Foods

impacting food choice

behaviors?



Source: Google Analytics

? Research Questions

Identify **different segments** of consumers based on their thoughts, behaviors and beliefs **regarding their health and wellness and what they eat.**

Explore **what actions consumers are taking** to cope with their health and wellness concerns, including what foods and ingredients they are avoiding and what they are seeking to change about their diet/how they eat.

Understand **what consumers know about ultra processed foods** (UPF) and how they define UPFs.

☑ The Plan

Quali/Quant Approach

Qual at Scale

Online survey

N=1000 (Gen Z, Millennials, Gen X, Boomers)

5 Key open-ended questions

Utilized a **protected AI** to help analyze open end responses

Clean Label Enthusiasts™

Tracking their behavior since 2017

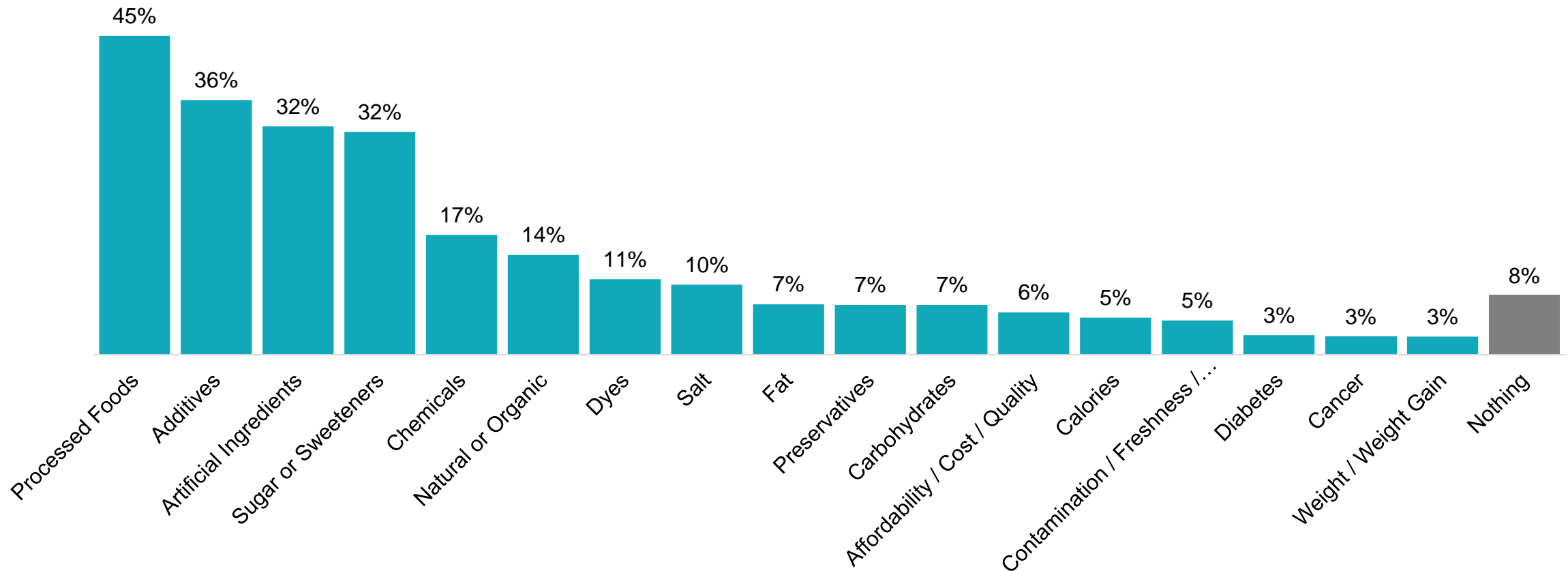
Consumers defined as being Clean Label Enthusiasts:

- Look at ingredients on the front and back labels
- Have specific attitudes & beliefs about ingredients that contribute to a clean label
- Buy products they perceive as being clean label



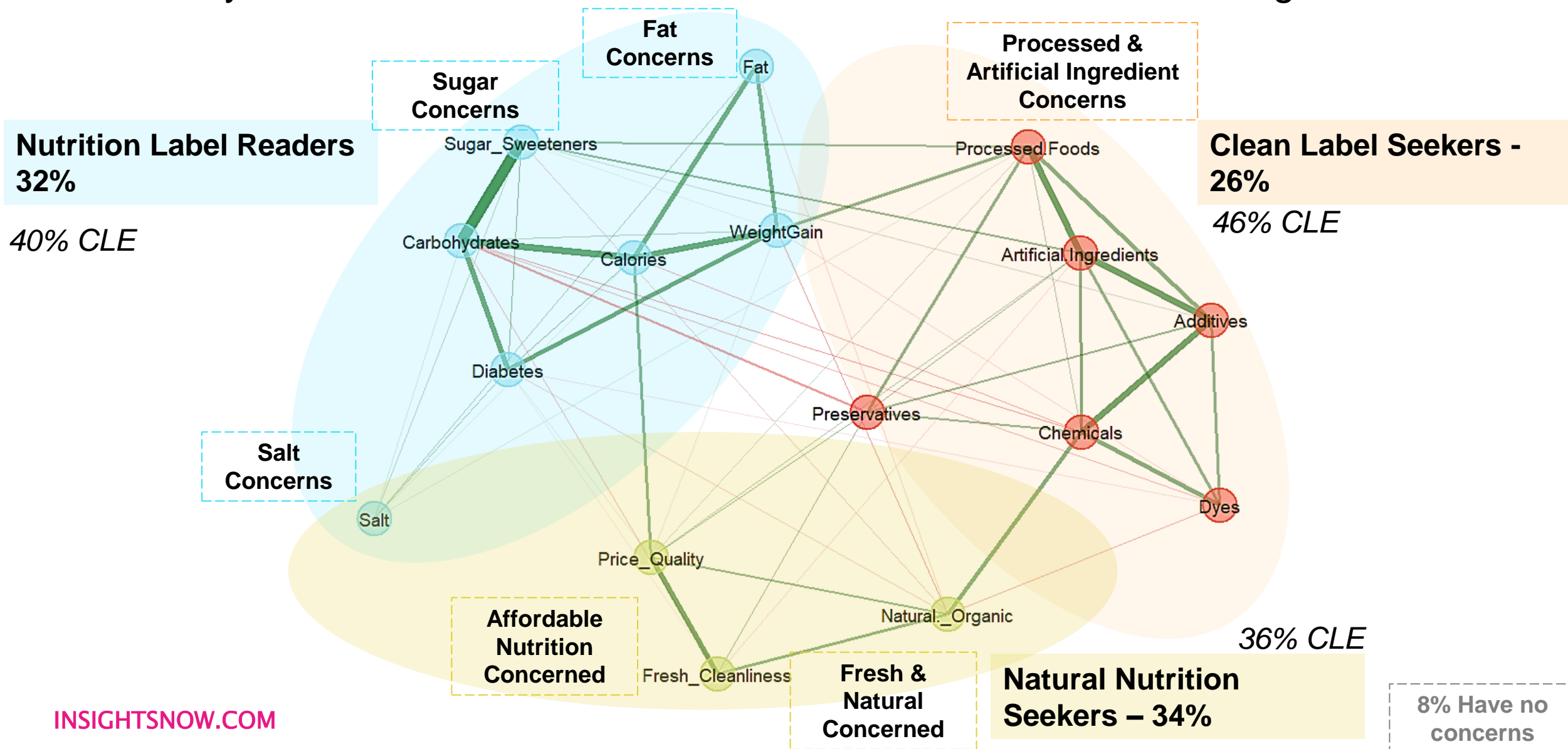
Almost half of participants are concerned about consuming processed foods

What are your health and wellness concerns about foods and beverages?



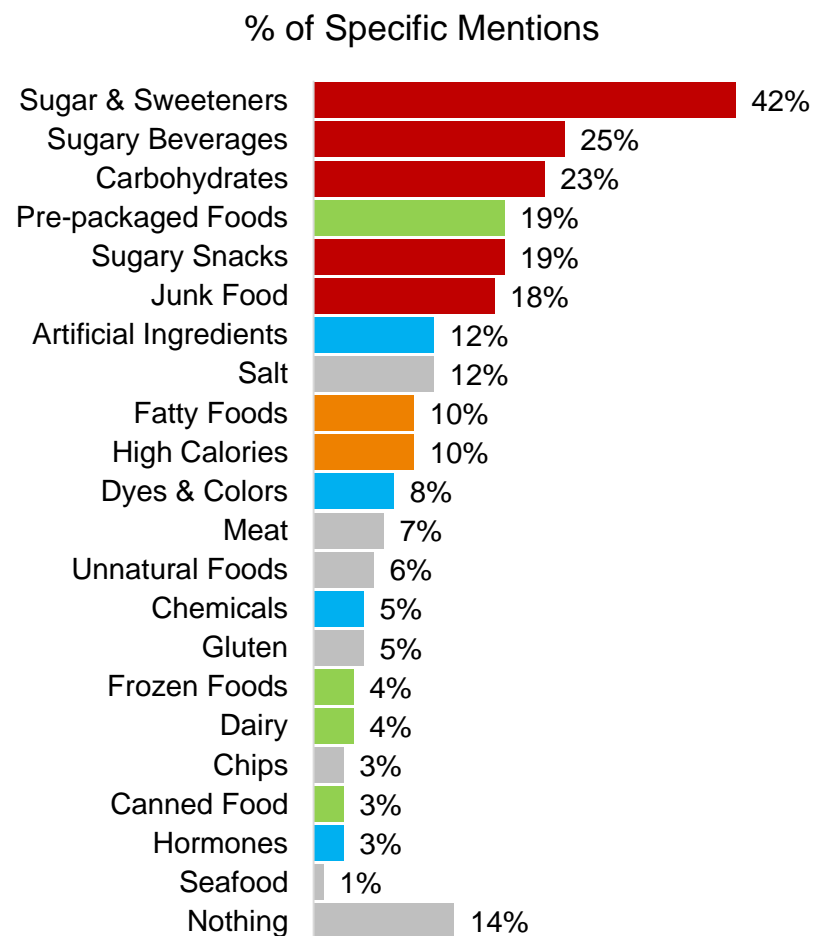
Three 'macro' behavior segments emerging

What are your health and wellness concerns about foods and beverages?

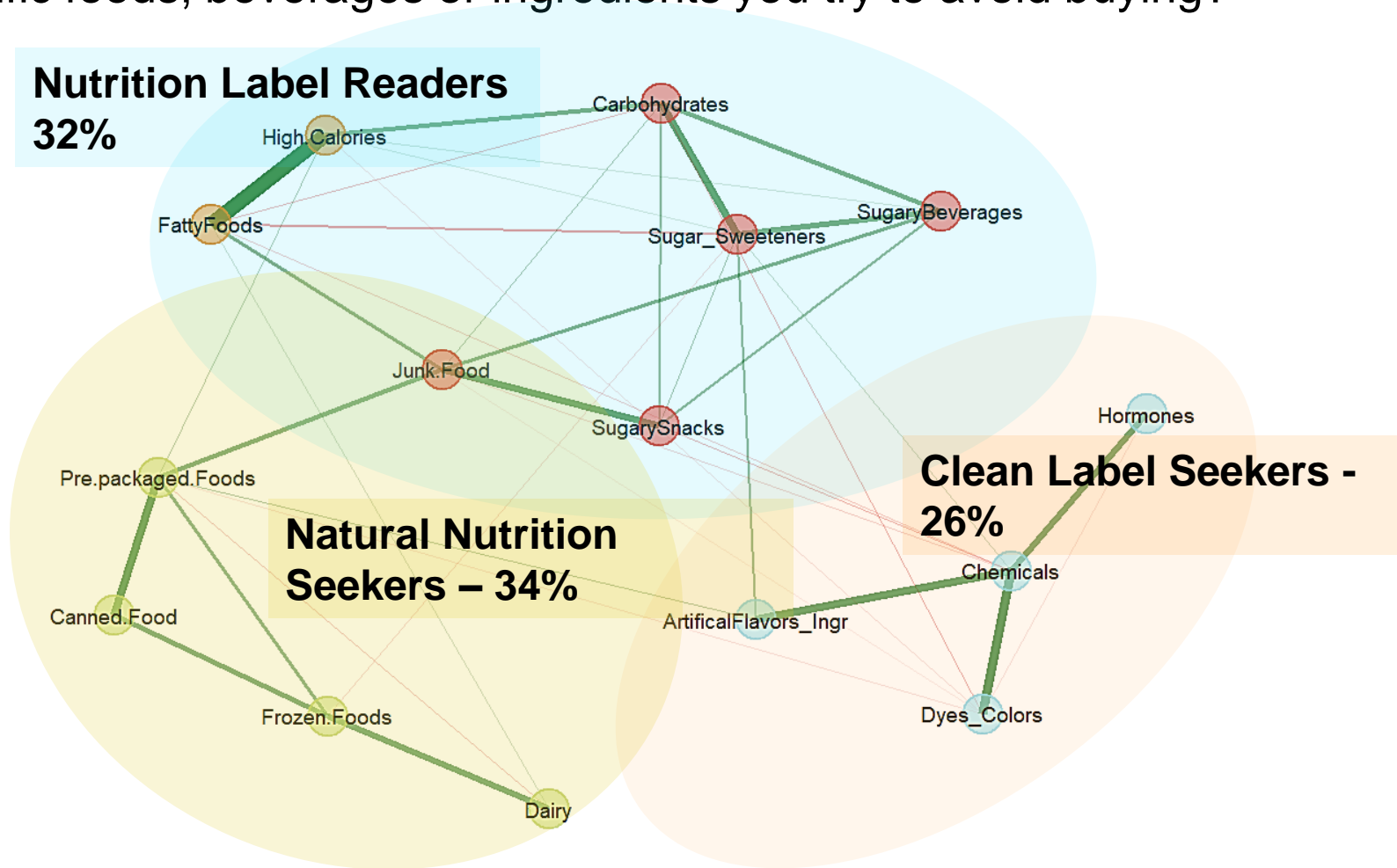


People are avoiding sugar, sweeteners and pre-packaged foods

When shopping, are there any specific foods, beverages or ingredients you try to avoid buying?



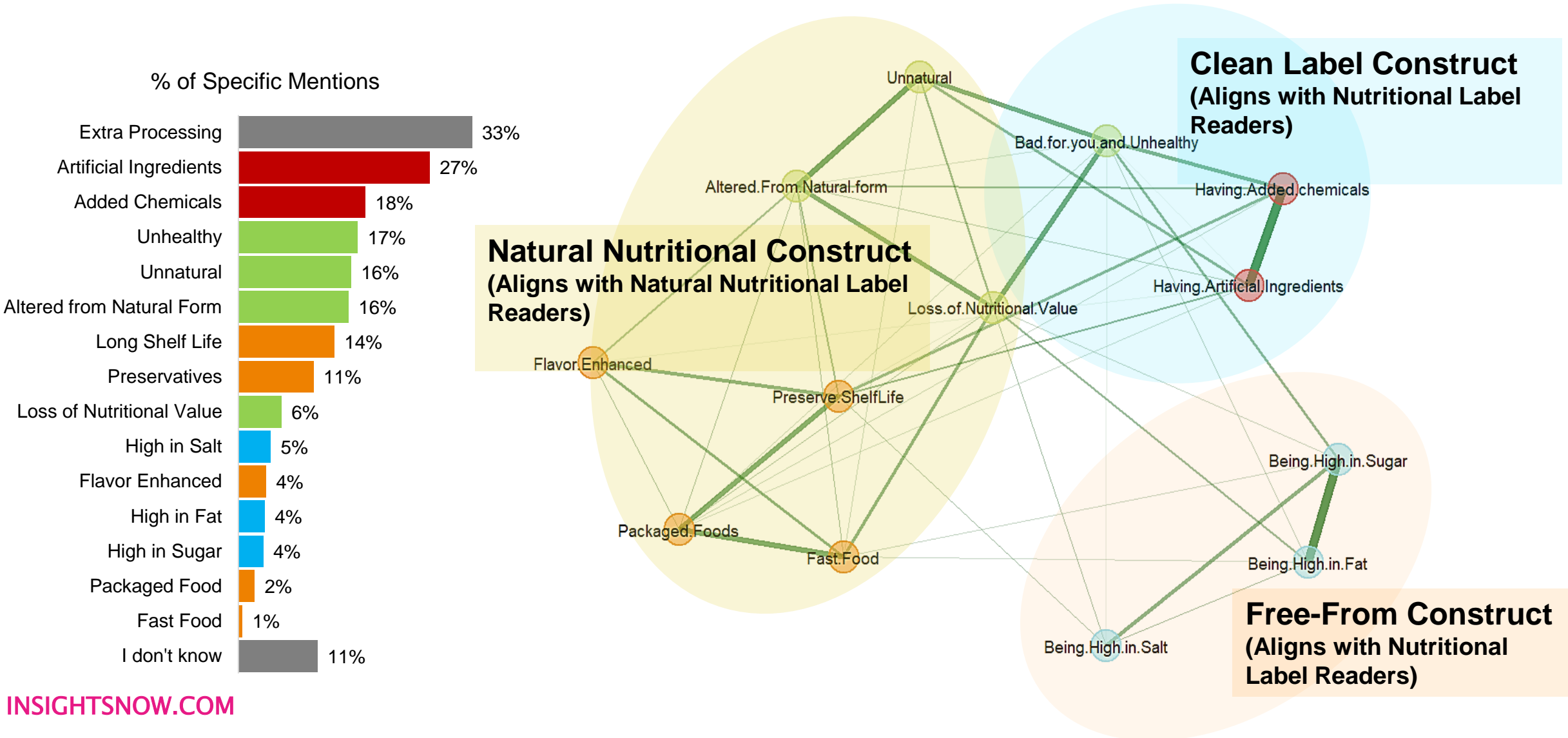
Nutrition Label Readers 32%



Salt, Meat, Unnatural Foods, Gluten, Chips, Seafood & Nothing have been removed from the network due to poor clustering stability

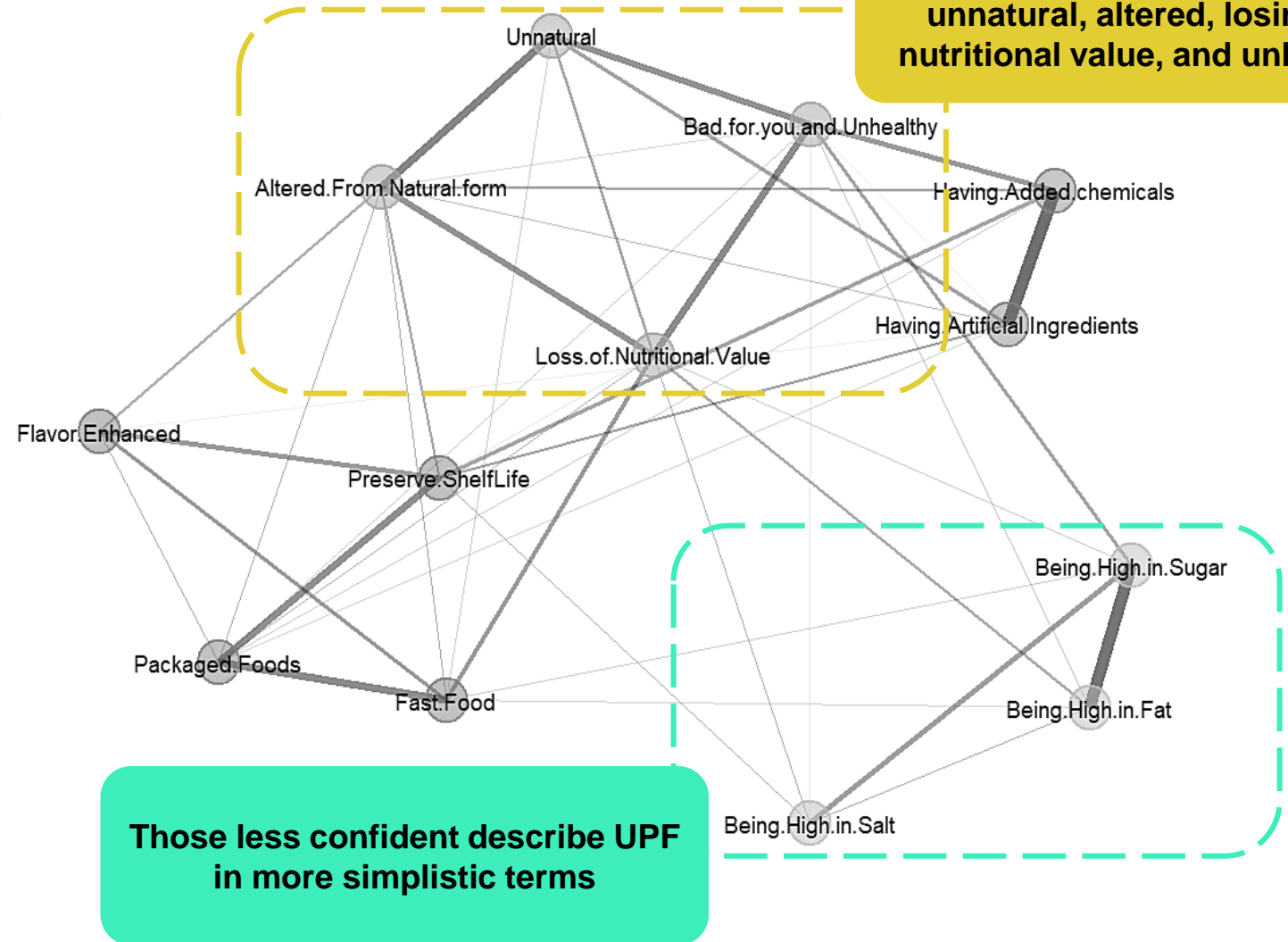
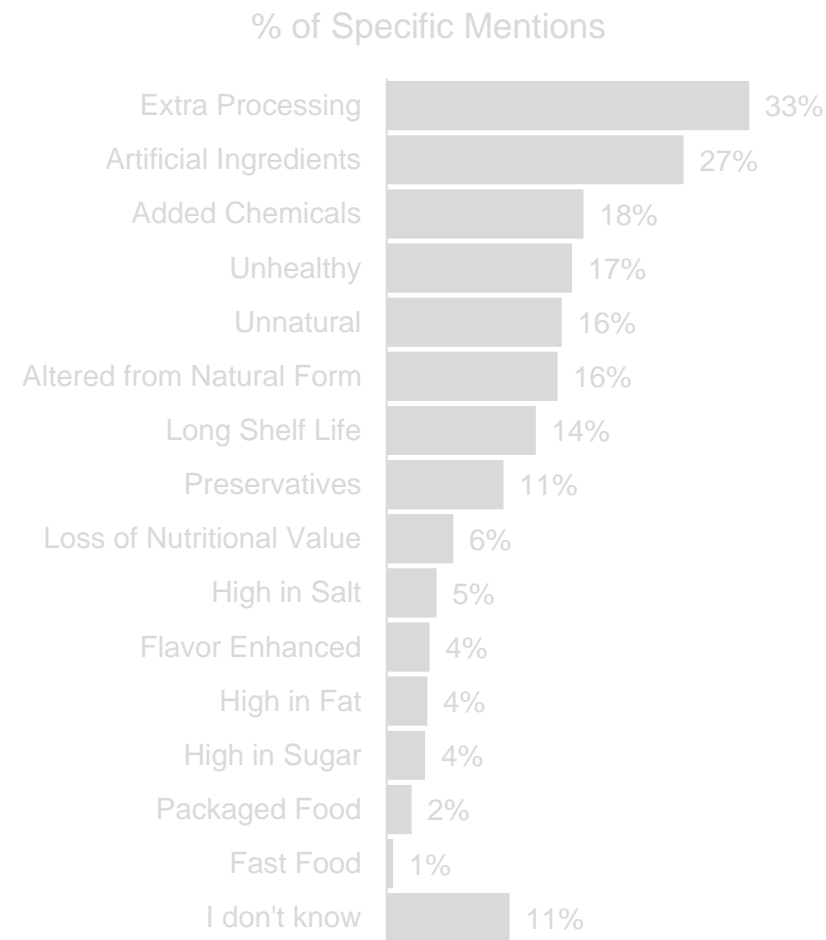
Three definitions emerge for UPF

What do you think the phrase "ultra-processed foods" means?



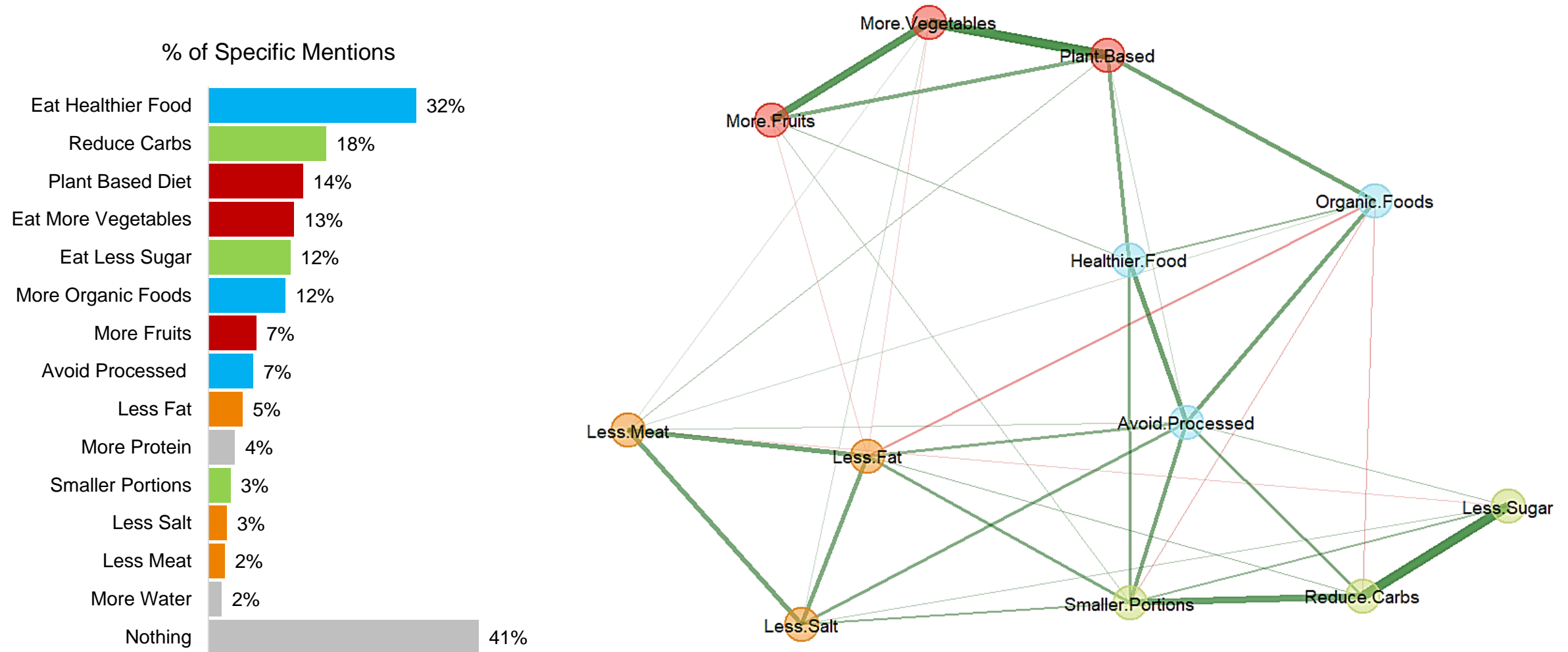
Less confidence in defining UPFs when associated with nutrient bad actors

What do you think the phrase "ultra-processed foods" means?



Aspiring to eat healthier by eating more plant-based, vegetables, organics and fruit

What changes would you like to make (or wish you could make) to your diet or the foods you eat?



Four Key Take Aways

**Qualitative at Scale
Learnings**

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**Opportunity 1:
Design for
Behavioral Impact**

INSIGHTSNOW.COM

**Opportunity 2:
Innovate Against
Aspirations, Not Fears**

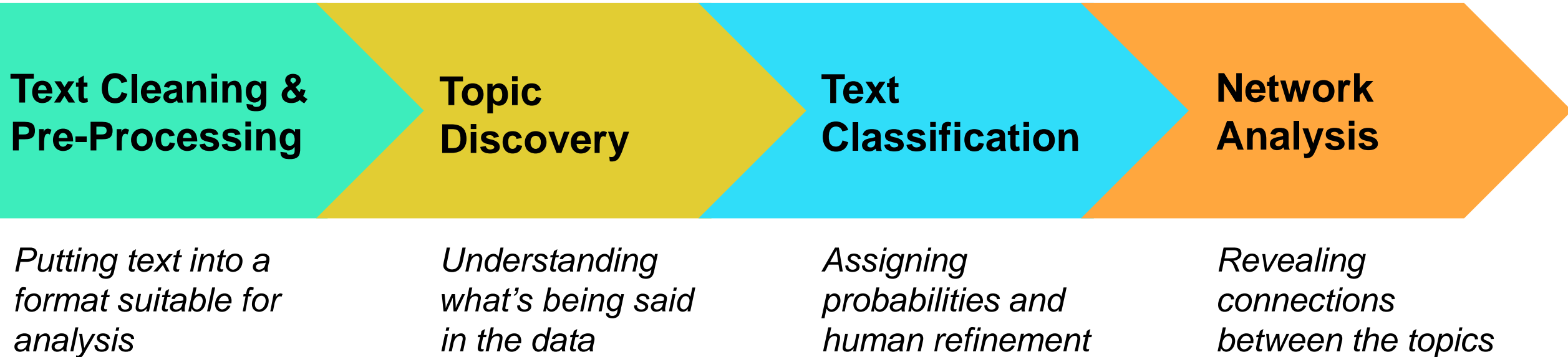
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**Opportunity 3:
Seize Control of the
Ultra-Processed Foods Narrative**

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Qualitative at Scale Learnings

Qual-At-Scale Learnings for Topic Modeling



Opportunity 1: Design for Behavioral Impact

Design for Behavioral Impact

Three Emerging Behavioral Segments

32% Nutrition
Label Readers



26% Clean
Label Seekers



34% Natural
Nutrition Seekers



38%

Clean Label Enthusiasts

Evolution of Health and Wellness Concerns

Insights into Coping Mechanisms & Behaviors

32% Nutrition
Label Readers



Free-From and Low-In

- Nutritional Claims
- Nutritional Label
- Nutritional Apps (e.g. Yuka)

26% Clean
Label Seekers



Clean Label

- Ingredient Lists (Simple, Natural, Not Artificial, Not Chemical, Minimally Processed)

34% Natural
Nutrition Seekers



Natural Nutrition

- NOT Altered from Natural Form
- NO Loss of Nutritional Value
- NOT Flavor Enhanced
- Natural & Organic Claims

Evolution of Health and Wellness Concerns

Insights into Coping Mechanisms & Behaviors

HOW TO READ A FOOD LABEL

If living with high cholesterol, pay close attention to the fat, sugar, and calorie lines

SERVING INFORMATION
Servings in entire package, and the size of each serving

TOTAL FAT
The amount of saturated (bad) and unsaturated (good) fat that is in one serving

NUTRIENTS
Key nutrients in one serving of the food

Nutrition Facts

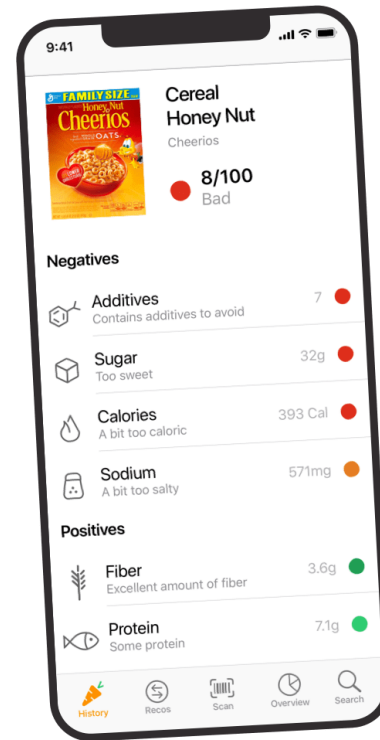
6 servings per container	
Serving Size	10 pieces (60g)
Amount per serving	
Calories	220
% Daily Value*	
Total Fat 3g	4%
Saturated Fat 0.5g	4%
Trans Fat 0g	
Cholesterol 5mg	2%
Sodium 270mg	12%
Total Carbohydrate 41g	15%
Dietary Fiber 4g	14%
Total Sugars 3g	
Includes 0g Added Sugars	0%
Protein 2g	
Vitamin D 0.1mcg	0%
Calcium 40mg	2%
Iron 1.6mg	8%
Potassium 170mg	2%

CALORIES
The amount of energy you get from one serving

% DAILY VALUE
The amount a nutrient contributes to your total daily diet based on a 2,000 calorie a day diet

TOTAL SUGARS + ADDED SUGARS
The amount of sugar that is in a product naturally and how much is added

Vs



Which is more understandable?

Which is more trusted?

Which is more useful to address various health & wellness concerns?

Evolution of Health and Wellness Concerns

Behavioral Impact through Behavioral Scoring

Viewing the brand

Is this “processed food” an avoidance?

Reading product claims

Is this “All Natural” claim believable?

Reading ingredient labels

What’s perceived as clean?



The image shows the packaging for Sun Chips Garden Salsa. The packaging is red and yellow, featuring the Sun Chips logo and the words "GARDEN SALSA". A circular seal on the left side of the packaging says "ALL NATURAL". Below the packaging, the ingredients list is provided. To the right of the packaging is a nutrition facts label.

Ingredients: Whole Corn, Sunflower and/or Canola Oil, Whole Wheat, Whole Oat Flour, Rice Flour, Sugar, Corn Bran, Tomato Powder, Salt, Natural Flavors, Maltodextrin (Made From Corn), Cheddar Cheese (Milk, Cheese Cultures, Salt, Enzymes), Dextrose, Buttermilk, Onion Powder, Whey, Yeast Extract, Romano Cheese (Part Skim Cow's Milk, Cheese Cultures, Salt, Enzymes), Whey Protein Concentrate, Corn Oil, Spices (Including Jalapeño Pepper), Citric Acid, Paprika Extracts, and Lactic Acid.
CONTAINS WHEAT AND MILK INGREDIENTS.

Nutrition Facts
Serving Size 1 oz. (28g/About 15 chips)

Amount Per Serving	
	% Daily Value*
Calories 140	Calories from Fat 60
Total Fat 6g	9%
Saturated Fat 1g	5%
Trans Fat 0g	
Polyunsaturated Fat 1.5g	
Monounsaturated Fat 3.5g	
Cholesterol 0mg	0%
Sodium 140mg	6%
Potassium 70mg	2%
Total Carbohydrate 19g	6%
Dietary Fiber 3g	10%
Sugars 2g	
Protein 2g	
Vitamin A 0%	Vitamin C 0%
Calcium 0%	Iron 2%
Vitamin E 6%	Thiamin 2%
Riboflavin 2%	Niacin 2%
Vitamin B6 4%	Phosphorus 6%
Magnesium 4%	Zinc 2%

* Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs:

	Calories: 2,000	2,500
Total Fat	Less than 65g	80g
Sat Fat	Less than 20g	25g
Cholesterol	Less than 300mg	300mg
Sodium	Less than 2,400mg	2,400mg
Potassium	3,500mg	3,500mg
Total Carbohydrate	300g	375g
Dietary Fiber	25g	30g

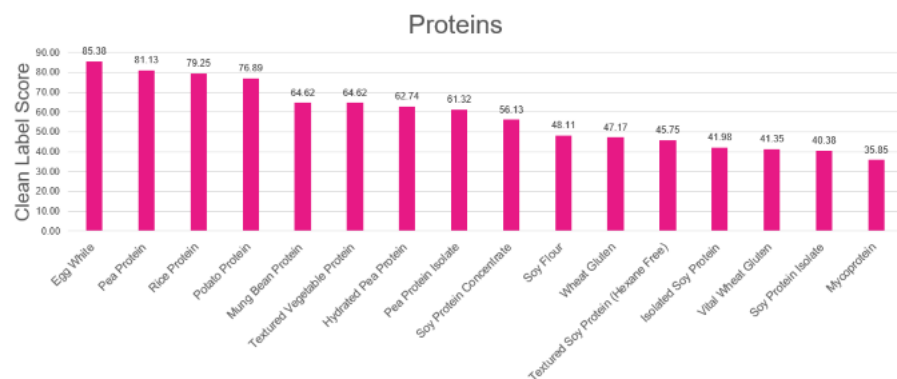
Calories per gram:
Fat 9 • Carbohydrate 4 • Protein 4

Reading nutrition facts

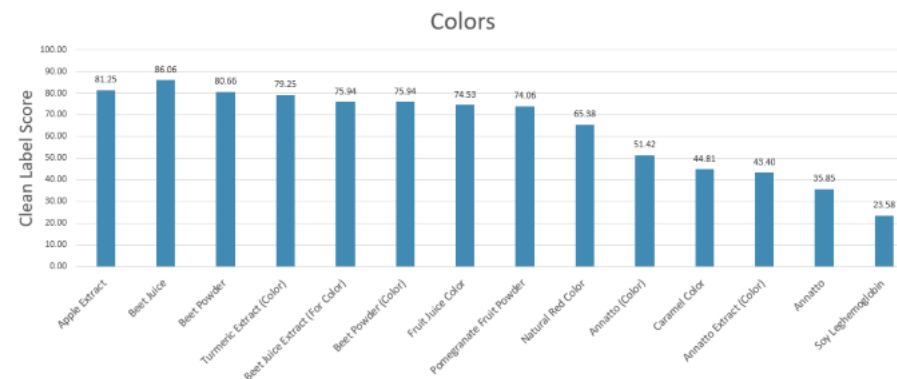
What levels are tolerable?

Behavioral Scoring Examples

Culinary Design for Clean Label

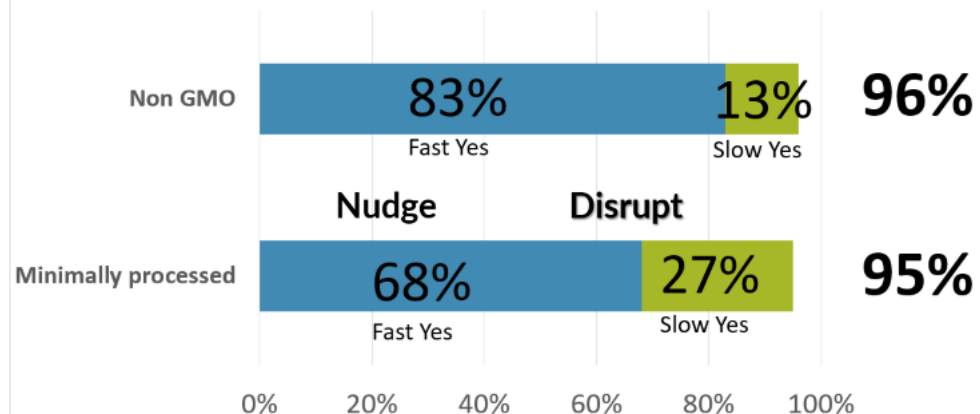


Culinary Design for Clean Label



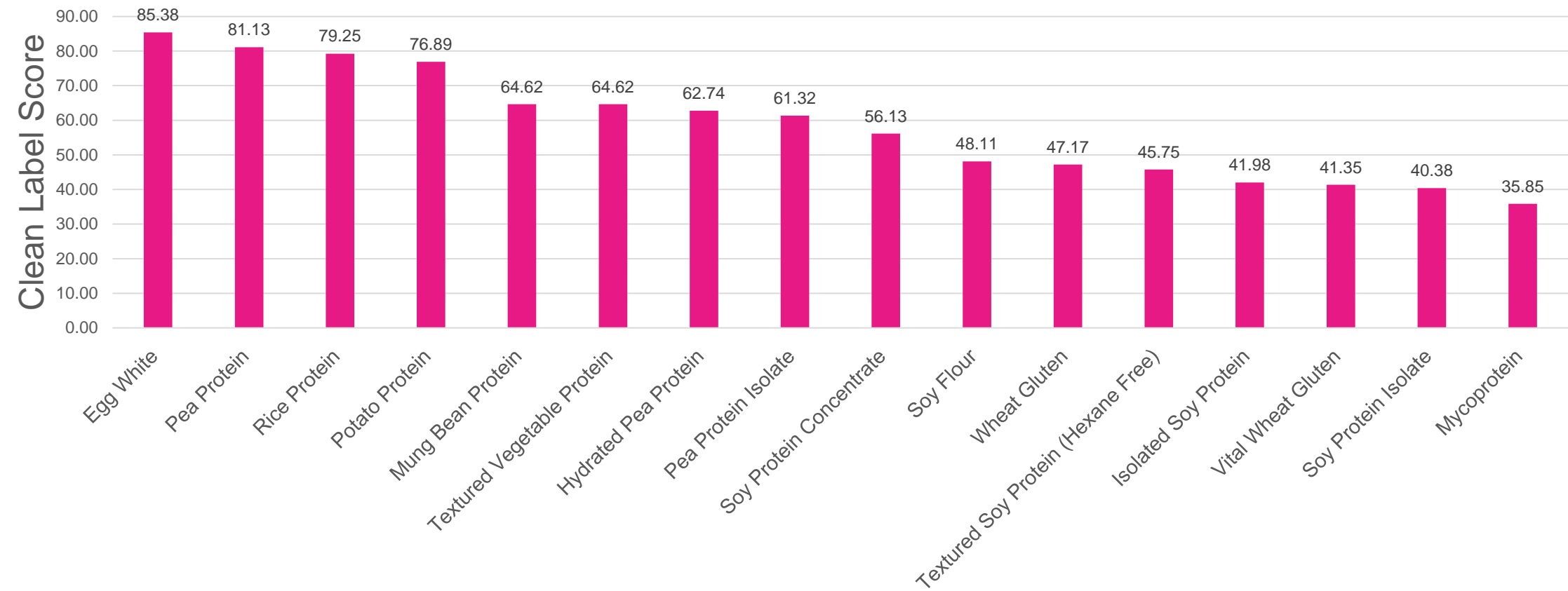
Claims Relevance and Disruption

Equally relevant, but won't have same behavioral impact

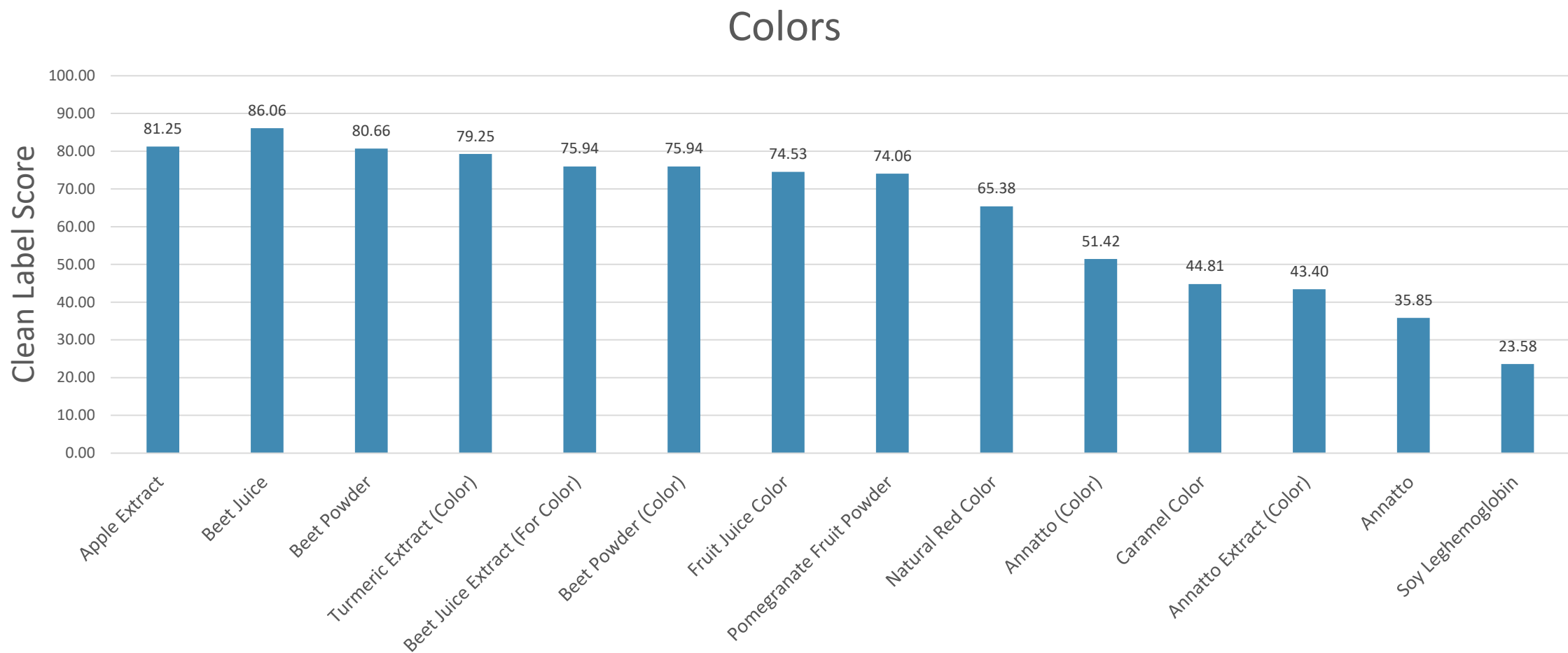


Culinary Design for Clean Label

Proteins

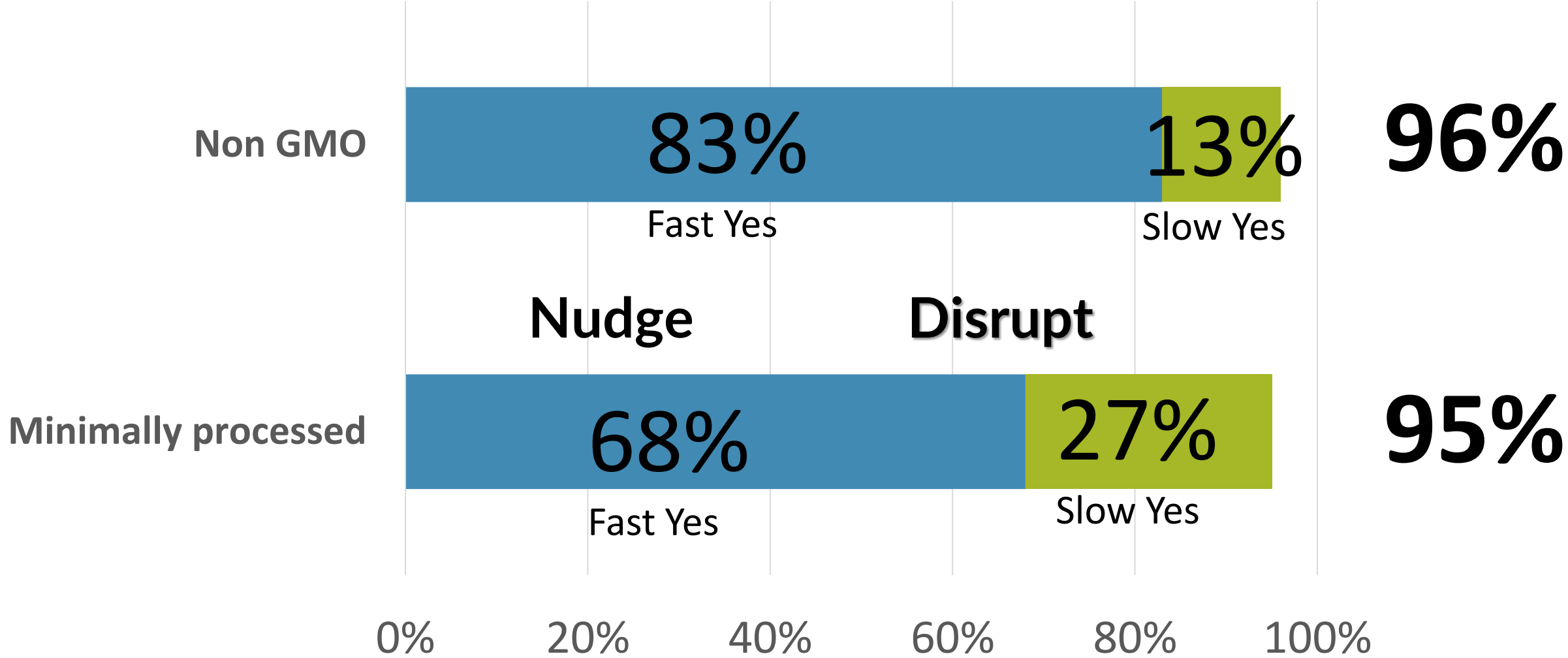


Culinary Design for Clean Label



Claims Relevance and Disruption

Equally relevant, but won't have same behavioral impact



**Opportunity 2:
Innovate Against
Aspirations, Not Fears**

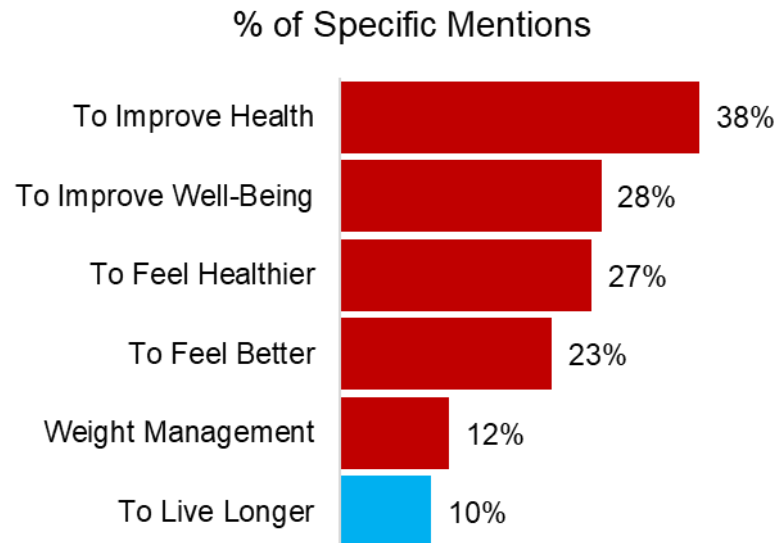
Impact on Food Behaviors

What to change in your diet?

32% Eat healthier
(12% more organic,
7% less processed)

14% More plant-based
(13% more vegetables,
7% more fruits)

Why change?

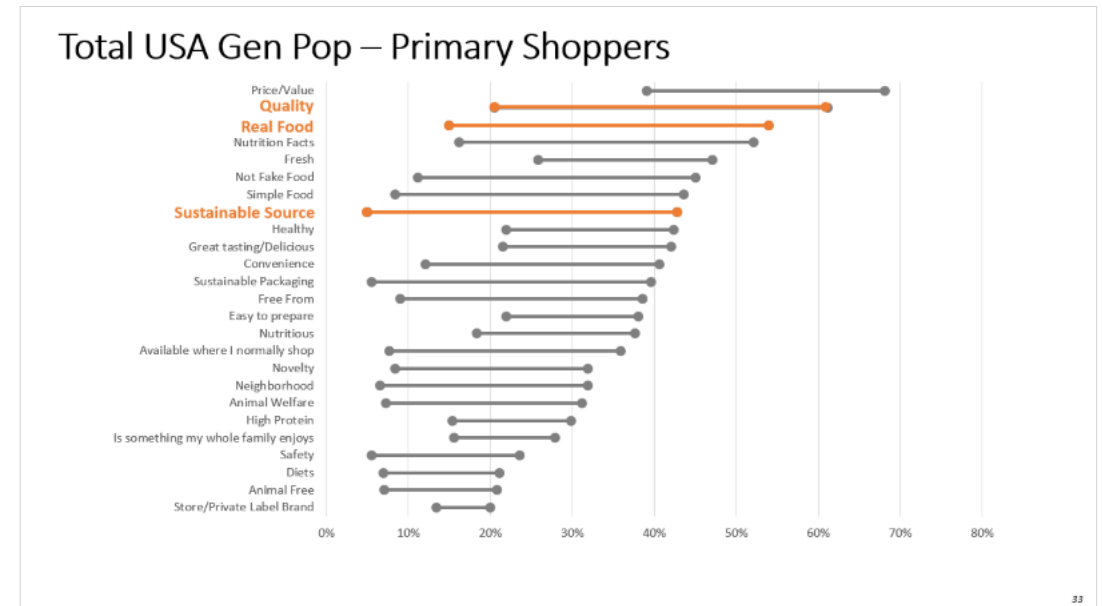
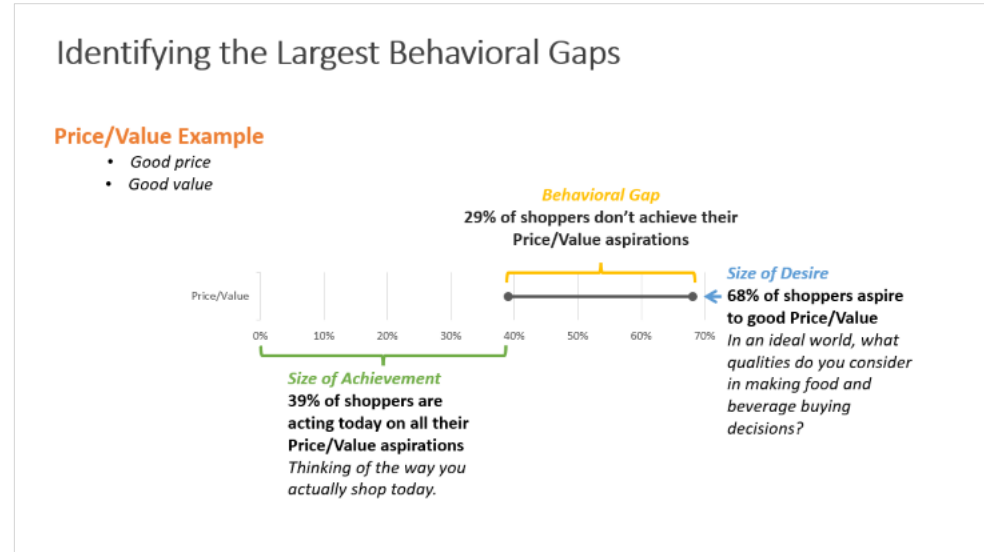


Only 6%
avoid diabetes,
long term illness
or chronic illness

Impact on Food Behaviors

Behavioral Scores to Identify Behavioral Whitespace

Aspirational Gaps Between What People are Doing and Aspire to Do Better



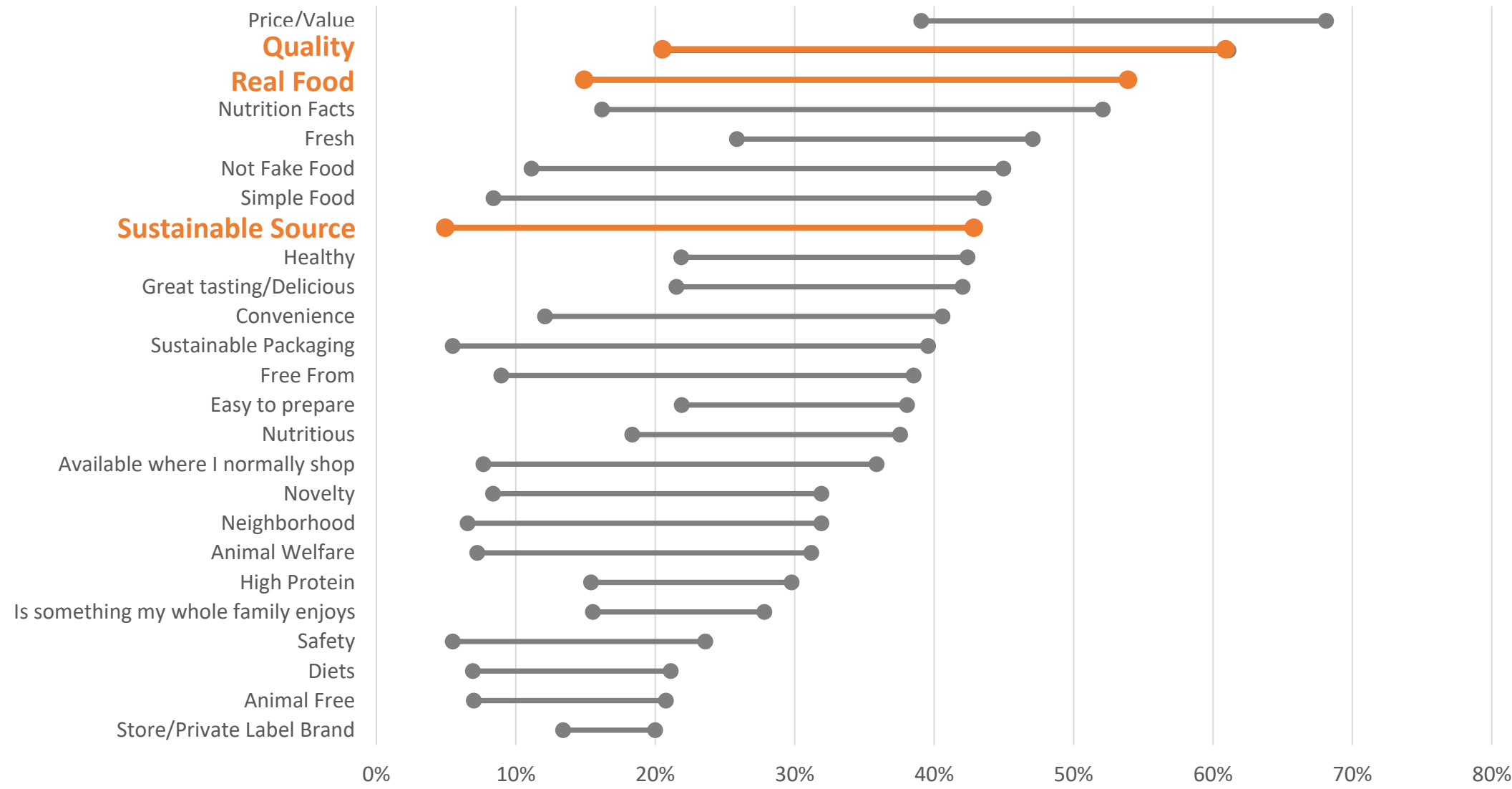
Identifying the Largest Behavioral Gaps

Price/Value Example

- *Good price*
- *Good value*

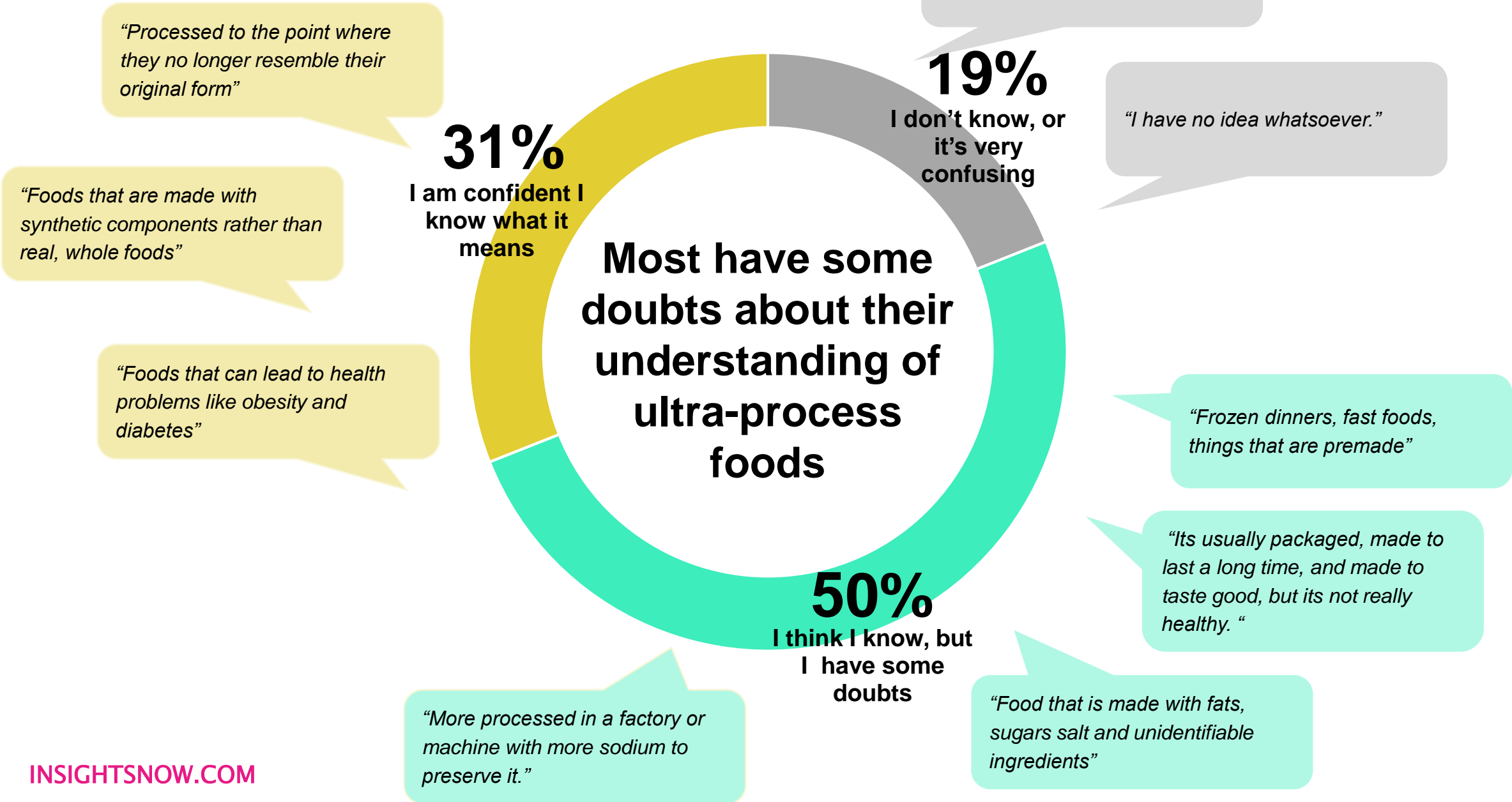


Total USA Gen Pop – Primary Shoppers



**Opportunity 3:
Seize Control of the
Ultra-Processed Foods Narrative**

How confident are you in your understanding of what "ultra-processed foods" mean?



**To be trusted, brands must stand
up for something...**

Say what you're going to do...

AND

Do what you're going to say!

Questions?



Dave Lundahl, PhD
Chief Executive Officer
Dave.lundahl@insightsnow.com

VISIT
Stand 507



You're invited to join our May Webinar!

Are you GLP-1 Friendly?

Applying behavior frameworks to
the **Voice of Consumer** to
understand the language of GLP-1
food experiences



<https://bit.ly/4jGwhcb>

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