

Weight Management Trends & Behaviors: Beyond Dieting & Obesity

Meeting consumer needs and expectations for better commercial and social outcomes

Report summary

- Detailed insights and analysis on the drivers and inhibitors of weight management. Includes strategic conclusions and actionable recommendations
- Country-specific data on obesity/overweight prevalence and quantitative insight about the relative importance consumers place on weight management
- Gauge the health of the industry: ascertains consumer trust in the weight management industry and the implications for brand development
- Covers 20 major markets across Europe, the Americas, Asia-Pacific, the Middle East, and Africa. Delivered as a full-length report and an abridged ppt. brief

Use this report to obtain an understanding of consumer attitudes and behaviors towards weight management with detailed, evidenced insight



Buy this report online now at
www.datamonitor.com/store

About this report

Introduction

Weight management is a core consumer and industry issue, especially in light of the high and growing prevalence of overweight/obese individuals worldwide. With the topic influencing consumer behavior and social policy, it is essential that the consumer packaged goods (CPG) industry is seen to be making proactively positive contributions.

Society is becoming increasingly obese, which suggests that current dietary habits are not facilitating effective weight management outcomes and that many weight management solutions have failed consumers. Accordingly, more consumers are focusing on proven results, demanding better science.

The insights uncovered in this report will facilitate improved understanding of how to effectively position weight management products by understanding the dietary approaches that resonate with consumers. This means meeting consumer needs and expectations for better commercial and social outcomes.

Key findings and highlights

- Almost a quarter (24%) of consumers deem “maintaining an ideal weight” to be ‘very important’. Approaching half (48%) also consider this to be an ‘important’ priority. Quite simply, majorities across the 20 countries covered believe in an “ideal weight”, and that it is something to strive towards.
- Weight loss is by far the most pronounced weight management intention in spite of weight gain continuing to be the prevailing reality across countries. Across the 20 countries surveyed by Datamonitor in July/August 2010, nearly half (49%) felt that “trying to lose weight” best describes what they are doing about their weight.
- Much of a product's eventual success hinges on its credibility and how trustworthy its motives and claimed benefits are deemed. However, consumers are highly untrusting towards the motives and credibility of the weight management industry with weight loss claims deemed even less trustworthy than general health and nutritional claims.

Reasons to buy

- Consumer understanding: obtain an understanding of consumer attitudes and behaviors towards weight management with detailed, evidence-led insight
- Market understanding: detailed country specific data outlining consumers' weight categorization and their weight management intentions & approaches
- Ideation: gain inspiration for innovative formulations and positioning, capitalizing on consumers' desire for effective weight management products

“Weight loss is by far the most pronounced weight management intention in spite of weight gain continuing to be the prevailing reality across countries.”

Mark Whalley, Datamonitor Analyst and Report Author



Sample pages

The Future Decoded DATAMONITOR

Figure 4: The weight management market is shaped by a myriad of drivers and inhibitors

WEIGHT MANAGEMENT DRIVERS	
<ul style="list-style-type: none"> Obesity: the global prevalence of obesity is continuing to burgeon, increasing the size of the market for weight management products. Information: the availability of advice online and in the mass media in addition to that from medical professionals makes it easier for consumers to understand the issues Legislation: more stringent regulations on the inclusion of unhealthy ingredients and advertising to children means products are getting less unhealthy, with less exposure for products with particularly poor nutritional value Appearance pressure: the consumer desire to have an attractive body shape acts as a motivator to manage their weight to this effect Awareness: media coverage of the size of the obesity problem and the potential health risks has heightened awareness among consumers 	<ul style="list-style-type: none"> More product varieties: industry players are concentrating on formulating products with healthier (or less unhealthy) ingredients, and launching more 'diet'-style product varieties Functional products: some advanced products contain functional ingredients that claim to actively aid the weight management process e.g. by burning fat Positive role models: increasingly celebrity role models who are held up as good examples to children and older consumers alike have more 'normal' and 'achievable' body shapes Exercise: consumers are more aware of the need to increase exercise levels and increasingly have access to facilities as a result of government schemes Initiatives: promotions by governments, health watchdogs and product manufacturers alike are promoting the benefits of good health and ensuring that weight is sensibly monitored and addressed
WEIGHT MANAGEMENT INHIBITORS	
<ul style="list-style-type: none"> Price: healthy products are often perceived as being more expensive than cheaper alternatives that use lower-cost but less-healthy ingredients Time scarcity: consumers' busy lifestyles means a greater reliance on often unhealthy convenience food and beverages and less opportunity to cook nutritious meals from scratch Disillusionment: a feeling of failure when a weight management regime suffers a setback can cause consumers to become disillusioned and even less inclined to work at their goals Negative marketing perception: products which advertise features such as 'diet' and 'zero calories' tend to be seen as compromises on taste and enjoyment, lowering their appeal for casual consumption 	<ul style="list-style-type: none"> Movement towards sensory: the more that consuming food and beverages is about enjoyment rather than a need to fuel the body for day-to-day life means more temptation to opt for great-tasting foods over potentially healthier but less exciting alternatives Misconceptions/optimism: many overweight consumers do not even realize their weight is not classified as 'normal', meaning they make no active attempts to address their weight problem Mindset: a lack of a proactive mindset and attitude displayed by many consumers worldwide is the reason for the current obesity crisis, with mindset undoubtedly difficult to change Perception of fad diets: consumers often link dieting to fast dieting, which is seen as unhealthy and a significant burden on day to day enjoyment of life

Source: Datamonitor analysis DATAMONITOR

Weight Management Trends & Behaviors: Beyond Dieting & Obesity DMCM4760/ Published 09/2010

© Datamonitor. This brief is a licensed product and is not to be photocopied Page 20

The Future Decoded DATAMONITOR

INSIGHT: Weight management approaches vary in line with conflicting consumer priorities

The main principle behind weight management is to balance caloric intake and expenditure. The most natural inclination for consumers looking to lose weight is to consume fewer calories, whether through the substitution of foods for less calorific alternatives, moderating portion size, or even abstaining from eating altogether. Given the numerous ways of approaching dieting/weight management, it is unsurprising that consumers vary in their favored approach.

Figure 36 below highlights a number of dietary approaches associated with weight management. The heightened emphasis on weight loss is reflected by the skew towards the lower half of the conceptual. However, it also captures the idea that weight management is beginning to be associated with more 'inclusive' dietary habits rather than moderating and avoiding food groups/ingredients. This reflects a shifting consumer preference for more positive messages about food choices and food ingredients (rather than focusing on what they are losing to help reach their weight management goals).

Overall, the high value of the dieting/weight management market makes it potentially lucrative for manufacturers. Although the complexity of defining the market means that valuations vary greatly, it is undoubtedly a sizeable opportunity. According to Online Dieter Research, the US diet market alone was worth \$59.7bn in 2009, placing the overall global value well beyond \$100bn. With so much spending on a myriad of dieting products (whether foods, beverages, supplements or even literature), there are obvious opportunities providing that products meet consumer needs and expectations.

Figure 36: The emphasis on weight loss is reflected by consumers' approaches to weight management

Source: Datamonitor analysis DATAMONITOR

Weight Management Trends & Behaviors: Beyond Dieting & Obesity DMCM4760/ Published 09/2010

© Datamonitor. This brief is a licensed product and is not to be photocopied Page 84

“Weight management is beginning to be associated with more ‘inclusive’ dietary habits and ingredients, rather than merely moderating and avoiding food groups/ingredients.”

Mark Whalley, Datamonitor Analyst and Report Author

Table of contents

OVERVIEW

- **Catalyst**
- **Summary**

THE FUTURE DECODED

- **INTRODUCTION: Weight management is a major consumer priority and therefore an industry defining issue**
 - Weight management is a multi-faceted issue that extends beyond diet and nutrition
 - Overweight and obesity prevalence has never been higher, although uncertainly exists about the best form of measuring this
 - Consumers generally believe in, and aspire towards, the notion of an "ideal weight"
 - Ultimately, the weight management market is subject to a number of conflicting drivers and inhibitors
- **TREND: Weight loss is by far the most pronounced weight management intention in spite of weight gain continuing to be the prevailing reality across countries**
 - Weight management is still far more heavily associated with weight loss than maintaining or gaining weight
 - The emphasis on weight loss is reflected by consumers' weight management food strategies
 - A worryingly high and growing proportion of overweight and obese individuals accounts for consumers' ongoing preoccupation with weight loss
 - Age and gender differences are apparent in obesity/overweight prevalence data
 - A discernable segment of consumers admit to compromising their health and nutrition in order to achieve their weight goals
 - Despite being highly focused on weight loss, many factors inhibit consumers' intentions
 - Weight loss intentions are complicated by the 'goal conflict' existing between health and indulgence
 - Key takeouts and implications: consumers are trying to lose weight, but evidently need more help to be able to do so healthily and effectively
- **INSIGHT: Consumers are more introspective about weight management and overall health, but this does not always lead to better outcomes**
 - Consumers are highly attentive to their body weight and shape, but express high levels of dissatisfaction towards both
 - Consumers are not necessarily honest with themselves about their weight, even if they are attentive towards it
 - Consumers embrace weight management strategies in line with a heightened focus on their general health
 - High health attentiveness influences consumers to make conscious efforts to eat more healthily
 - The introspective consumer is more likely to explore how food affects health, particularly their weight
 - Introspectiveness towards food and health can be potentially detrimental to weight management goals when it leads to 'food stress', elevated guilt, and induces novelty-led indulgence
 - A desire to improve physical appearance is the core motivator in staying on track with weight goals
 - Majorities of consumers are conscious of the relationship between diet and appearance
 - Key takeouts and implications: important disconnects are apparent between consumers' attentiveness towards weight management issues and their expressed satisfaction
- **INSIGHT: Exercise rates are marginally growing with consumers appearing less engaged with physical fitness than other aspects of wellbeing**
 - Motivations for being physically active are heavily influenced by weight/appearance consciousness
 - Citizens who are highly attentive towards their physical fitness are still in the minority
 - Consumers find it difficult to put aside enough time to exercise in line with the recommended quotas
 - Despite obvious weight concerns, there is only a gradual increase in the amount of exercise being undertaken
 - Key takeouts and implications: exercise levels are not high enough to compensate for higher than recommended calorific intakes
- **INSIGHT: Weight management approaches vary in line with conflicting consumer priorities**
 - Specific diet plans are becoming a more popular feature of consumers' weight management strategies, despite considerable uncertainty about the efficacy of the outcome
 - The appeal of weight management/diet products' depends on positioning, but it is important to recognize that consumers want to hear more positive messages about healthier food and drinks
 - Most consumers consider themselves to be somewhat well informed when it comes to daily calorie intake
 - Consumers are generally more attentive to meal size than calorie counts
 - Attempts to eat and drink smaller portions are widespread
 - Consumers are more influenced by fat content than calorie count when purchasing food and beverages
 - Reducing the urge to snack between meals, satiety is a weight management concept gaining momentum
 - Key takeouts and implications: the complexity of weight management is reflected by the plethora of approaches consumers adopt to meet their intentions
- **INSIGHT: Although less common, intentions to maintain and gain weight should not be overlooked in the weight management space**
 - Globally, around one in 14 consumers is trying to gain weight and one in four is focused on maintaining weight
 - Weight maintenance is largely associated with sustaining a balanced diet, something most consumers feel somewhat informed about, but few feel very informed about
 - Weight gain is only necessary for the minority but is especially important for underweight children who may develop a number of health problems if this is not addressed



Table of contents (continued)

- Key takeouts and implications: consumers feel as though they understand how to maintain or gain weight but it is important that they are encouraged to do so in a sensible and healthy way
- **INSIGHT: Consumers are highly untrusting towards the motives and credibility of the weight management industry**
 - Consumers deem weight loss claims to be even less trustworthy than general health and nutritional claims, which are also perceived with considerable skepticism
 - Most consumers perceive the motivations of the overall weight loss industry, not just weight loss claims attached to products, to be untrustworthy
 - Gaining professional nutritionist accreditation may enhance credibility as these individuals are generally perceived as being more trustworthy than the industry overall
 - Functional products claiming to facilitate weight loss are regarded with a high degree of skepticism
 - Key takeouts and implications: consumer trust in the weight management sphere is low, which restricts the long-term market potential and, arguably, even the wellbeing of citizens
- **INSIGHT: The implications of alcohol consumption and weight are becoming more prominent consumer considerations**
 - Health is having a more pervasive impact on alcoholic beverage choice
 - Drinkers do not feel well informed enough regarding the calorific content of alcohol
 - The possibility of weight gain via alcohol consumption is not something the majority of consumers are attentive towards, albeit with notable country nuances
 - Lack of awareness and attention may account for drinkers' indifference to the idea of opting for lower alcohol beverages
 - Key takeouts and implications: health has some influence over consumers' alcoholic drinks choices

ACTION POINTS

- **ACTION: Carefully determine where a product and brand fits on the health and indulgence continuum**
- **ACTION: Provide consumers with salient education/information necessary to make informed decisions that form part of a reliable weight management strategy**
- **ACTION: Ensure that trust-enhancing marketing tactics drive weight management marketing efforts**
- **ACTION: Relentlessly follow ingredient trends and research developments to maximize product relevancy**

APPENDIX

- **Supplementary data**
- **Report methodology**
- **Further reading and references**

- **Ask the analyst**
- **Datamonitor consulting**
- **Disclaimer**

LIST OF TABLES

- Table 1: Consumer survey: aggregated importance attached to "maintaining an ideal weight" across 20 countries, by age and gender, 2010
- Table 2: Consumer survey: expressed weight management intentions, in 20 countries across Europe, Asia Pacific, the Americas, MENA, and South Africa, by country, 2010
- Table 3: Consumer survey: weight management intentions across 20 countries, by age and gender, 2010
- Table 4: Classification of citizens according to Body Mass Index (BMI): percentage of obese, overweight, normal weight and underweight individuals, in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2004-2014
- Table 5: Consumer survey: agreement with the statement "I have compromised my health/nutrition in order to achieve my weight goals", in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2010
- Table 6: Consumer survey: agreement with the statement "I have compromised my health/nutrition in order to achieve my weight goals" across 20 countries, by age and gender, 2010
- Table 7: Consumer survey: agreement with the statement "I have compromised my health/nutrition in order to achieve my weight goals" across 20 countries, by age and gender, 2010
- Table 8: Consumer survey: degree of self-reported attention to body weight and shape across 20 countries, by age and gender, 2010
- Table 9: Consumer survey: degree of self-reported attention to general health across 20 countries, by age and gender, 2010
- Table 10: Consumer survey: propensity to make conscious attempts to eat healthily, in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2009 and 2010
- Table 11: Consumer survey: aggregated propensity to make conscious attempts to eat healthily across 20 countries, by age and gender, 2010
- Table 12: Consumer survey: aggregated propensity to read up on/find out about maintaining good health across 20 countries, by age and gender, 2010
- Table 13: Consumer survey: agreement with the statement "reading or hearing about the relationship between food and weight is of interest to me", in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2009 and 2010
- Table 14: Consumer survey: agreement with the statement "reading or hearing about the relationship between food and weight is of interest to me" across 20 countries, by age and gender, 2010



Table of contents (continued)

- Table 15: Consumer survey: attentiveness towards physical attractiveness/appearance across 20 countries, by age and gender, 2010
- Table 16: Consumer survey: agreement with the statement, "I am conscious of the link between diet and appearance", in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2009 and 2010
- Table 17: Consumer survey: agreement with the statement, "I am conscious of the link between diet and appearance" across 20 countries, by age and gender, 2010
- Table 18: Consumer survey: degree of self-reported attention to physical fitness across 20 countries, by age and gender, 2010
- Table 19: Consumer survey: aggregated self-reported propensity to ensure an adequate amount of exercise is undertaken each week, by age and gender, 2010
- Table 20: Daily time spent undertaking moderate exercise (minutes), in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2004-2014
- Table 21: Aggregated daily time spent undertaking moderate exercise (minutes), in Asia Pacific, Europe, the Americas and the Middle East and Africa, by region, age and gender, 2009
- Table 22: Consumer survey: propensity to follow a specific diet plan, in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2009 and 2010
- Table 23: Consumer survey: propensity to follow a specific diet plan across 20 countries, by age and gender, 2010
- Table 24: Consumer survey: agreement with the statement "dieting is an effective way of losing weight in the long-term", in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2010
- Table 25: Consumer survey: agreement with the statement "dieting is an effective way of losing weight in the long-term" across 20 countries, by age and gender, 2010
- Table 26: Consumer survey: agreement with the statement "I am more interested in hearing about what to eat, rather than what not to eat" across 20 countries, by age and gender, 2010
- Table 27: Consumer survey: degree to which consumers across 20 countries feel informed about the amount of calories that should be consumed daily, by age and gender, 2010
- Table 28: Consumer survey: degree of attentiveness towards the amount of calories consumed and the amount of food consumed across 20 countries, by age and gender, 2010
- Table 29: Consumer survey: propensity eat and drink smaller portions, in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2009 and 2010
- Table 30: Consumer survey: propensity eat and drink smaller portions across 20 countries, by age and gender, 2010
- Table 31: Consumer survey: perceived influence of 'low or reduced fat' and 'low or reduced calories' claims, in 17 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2009
- Table 32: Consumer survey: proportion of consumers trying to maintain or gain weight, by country, 2010
- Table 33: Consumer survey: degree to which consumers feel informed about what constitutes a balanced diet across 20 countries, by age and gender, 2010
- Table 34: Consumer survey: degree of trust in the health and nutritional claims made by food and drink manufacturers, in 20 countries across Asia Pacific, Europe, the Americas and the Middle East and Africa, by country, 2008 and 2010
- Table 35: Consumer survey: degree of trust in the 'general health and nutritional claims' and 'weight loss claims' made by food and drink manufacturers across 20 countries, by age and gender, 2010
- Table 36: Consumer survey: degree of trust in the motivations of the weight loss industry across 20 countries, by age and gender, 2010
- Table 37: Consumer survey: degree of trust in the recommendations from professional nutritionists about what to eat and drink, by age and gender, 2010
- Table 38: Consumer survey: the extent to which drinkers feel well informed as to the number of calories in particular alcoholic drinks across 20 countries, by age and gender, 2010
- Table 39: Consumer survey: attentiveness to potential weight gain from drinking alcohol, in 18 countries across Europe, Asia Pacific, the Americas, MENA, and South Africa, by country, 2010
- Table 40: Consumer survey: Comparison of the percentage of global consumers who have opted for lower alcohol versions of favorite brands more often, by country, 2009 & 2010
- Table 41: Consumer survey: propensity to opt for lower alcohol versions of favorite brands more often, by age and gender, 2010
- Table 42: Product insight: total 'low alcohol' and 'low/no calorie' SKU launches globally, 2005-2009
- Table 43: Number and percentage of obese, overweight, normal weight and underweight citizens in France, by age and gender, 2004-2014
- Table 44: Number and percentage of obese, overweight, normal weight and underweight citizens in Germany, by age and gender, 2004-2014
- Table 45: Number and percentage of obese, overweight, normal weight and underweight citizens in Italy, by age and gender, 2004-2014
- Table 46: Number and percentage of obese, overweight, normal weight and underweight citizens in the Netherlands, by age and gender, 2004-2014
- Table 47: Number and percentage of obese, overweight, normal weight and underweight citizens in Russia, by age and gender, 2004-2014
- Table 48: Number and percentage of obese, overweight, normal weight and underweight citizens in Spain, by age and gender, 2004-2014
- Table 49: Number and percentage of obese, overweight, normal weight and underweight citizens in Sweden, by age and gender, 2004-2014
- Table 50: Number and percentage of obese, overweight, normal weight and underweight citizens in the UK, by age and gender, 2004-2014

For a full list of tables and figures please refer to www.datamonitor.com/store



Interested in this topic?

To achieve profitable growth, a company needs to identify large addressable growth segments and create propositions to meet these consumers' needs. The NCI portfolio helps subscribers to make a first evaluation of a consumer segment by providing concise, practical information and creative ideas. The portfolio is a must-read for many client functions: Marketing, Consumer Insight, Strategic Planning, NPD, and Sales.

Other reports in this series



Kids Nutrition: New Perspectives and Opportunities

With the growing prevalence of obesity among children, and rising media fuelled awareness among parents, kids' nutrition has become a key concern to society. This report looks at kids' nutrition in detail and analyzes its impact on CPG players.

Published: May-10 | Code: DMCM4736



The Future of Functional Food & Drinks: Capitalizing On Evolving Consumer, Product & Ingredient Trends

This report focuses on the ongoing evolution of the functional food and drinks market. It explores each of the major functional need state opportunities in detail by providing market, consumer, product and ingredient insight.

Published: Apr-10 | Code: DMCM4737



Food Nutrients and Ingredients: Attitudinal and Behavioral Trends in Asia-Pacific

Asia-Pacific consumers are paying more attention to the nutritional profile of food and beverages. This report, focusing on the major dietary food components, details how formulation specifics affect the dietary choices of consumers in the region.

Published: Dec-09 | Code: DMCM4714



Food Nutrients and Ingredients: Attitudinal and Behavioral Trends in the Americas

US, Brazilian and Canadian consumers are paying more attention to the nutritional profile of food and drinks. This report, focusing on the major dietary components, details how formulation specifics shape the dietary choices of these consumers.

Published: Dec-09 | Code: DMCM4713

For more information about these products or to browse and purchase from our huge range of research, please visit www.datamonitor.com/store.

Contact our customer service team today...

Europe	tel: +44 20 7675 7764	fax: +44 20 7990 9988	email: reports@datamonitor.com
Americas	tel: +1 212 686 7400	fax: +1 646 365 3362	email: reports@datamonitor.com
Middle East	tel: +971 4 408 2832	fax: +971 4 335 2647	email: reports@datamonitor.com
Asia Pacific	tel: +61 2 8705 6900	fax: +61 2 8705 6901	email: reports@datamonitor.com



Datamonitor Report

Published: Oct 10 | Code: DMCM4760

Buy this report online now at
www.datamonitor.com/store

Place your order now...

1) Confirm the license type you require

Weight Management Trends & Behaviors: Beyond Dieting & Obesity

Single-user license Multi-user license (Please refer to www.datamonitor.com/store for up-to-date prices)

2) Complete your details

Title Mr / Mrs / Ms (delete as appropriate)

Name

Job Title

Department

Company

Address

City

State/Province

Post Code/ZIP

Country

Email

Telephone

Datamonitor products and services are supplied under Datamonitor's standard terms and conditions, copies of which are available on request. Payment must be received within 28 days of receipt of invoice.

- I do not want to receive future mailings from Datamonitor and its related companies.
- I do not wish to receive phone calls from Datamonitor.
- Occasionally, our client list is made available to other companies for carefully selected mailings. Please check here if you do not wish to receive such mailings.

3) Complete your payment details

What is your preferred currency option?

UK£ Euro€ US\$ Yen¥

How would you like to pay?

- I enclose a check payable to Datamonitor for
- Please invoice my company for

Please supply purchase order number (if required)

.....

If you are an EU company (except UK) please supply your VAT / BTW / MOMS / MWST / IVA / FPA number

.....

4) Sign below to confirm your order

X

Date.....

5) Fax this completed form back

+44 20 7675 7016 (Europe)
+971 4 335 2647 (Middle East)

+1 646 365 3362 (Americas)
+61 2 8705 6901 (Asia-Pacific)

Alternatively you can scan and email this form to reports@datamonitor.com