

A Nielsen Report  
**Battle of the Bulge  
& Nutrition Labels**  
Healthy Eating Trends  
Around the World

January 2012



# MORE THAN HALF OF CONSUMERS AROUND THE WORLD CONSIDER THEMSELVES OVERWEIGHT

Half (48%) of consumers around the world are trying to lose weight.

One-in-seven are cutting down on fats to shed unwanted pounds.

Six-in-10 indicate difficulty grasping nutritional labels on food packages.

Over two-thirds believe nutritional claims are either never or only sometimes trustworthy.

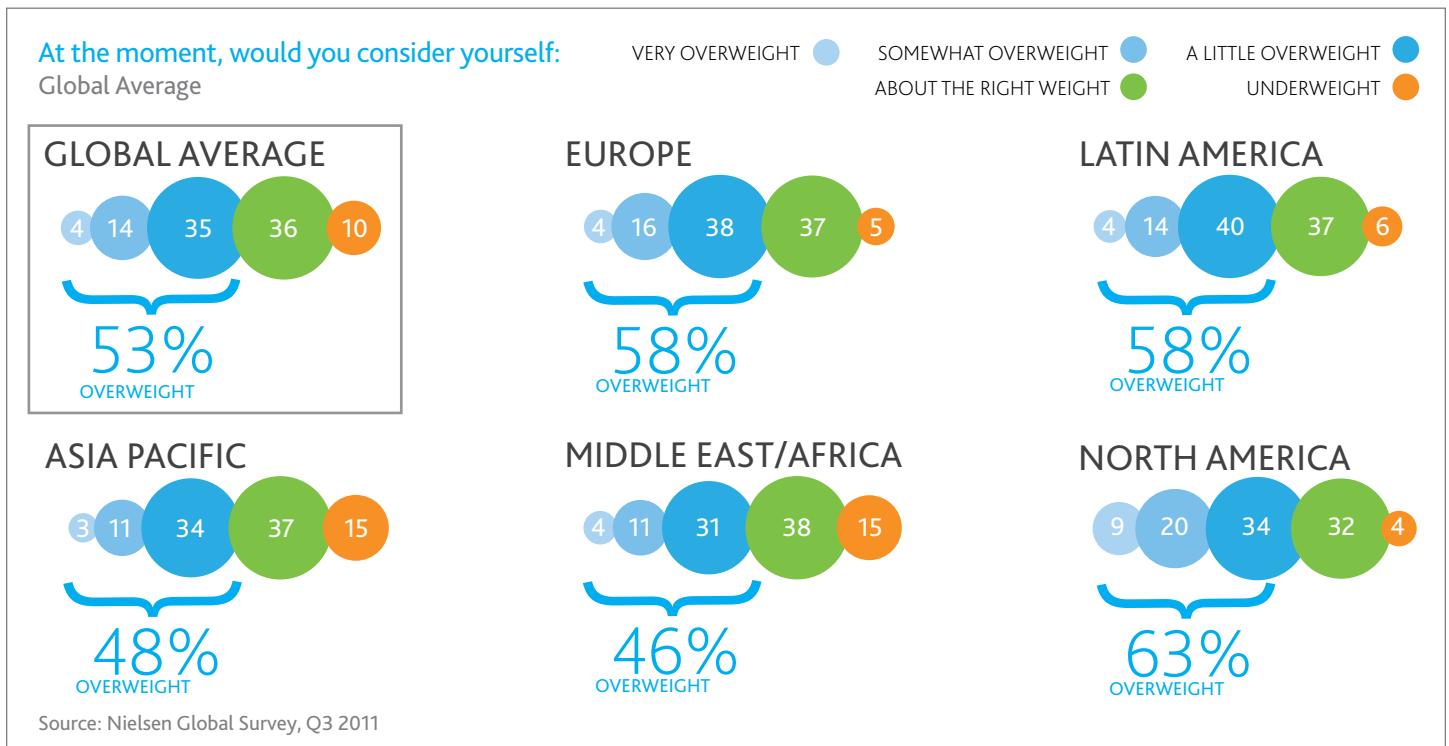
Half of global respondents say fast food restaurants should always include calorie information on menus.

More than half (53%) of consumers around the world say they are overweight—up from 50 percent three years ago. Roughly one-third consider themselves just the right weight, which is down from 40 percent in 2008 and one-in-10 believe they are underweight. New findings from a Nielsen survey of more than 25,000 online respondents from 56 countries around the world reveal how consumers are battling the bulge and how food producers and marketers can help fight the good fight against obesity.

With half of respondents claiming to be overweight, it's logical that half (48%) are also trying to lose weight. And for more than three-quarters (78%) of these consumers, the way to shed unwanted pounds is through diet. But do consumers understand

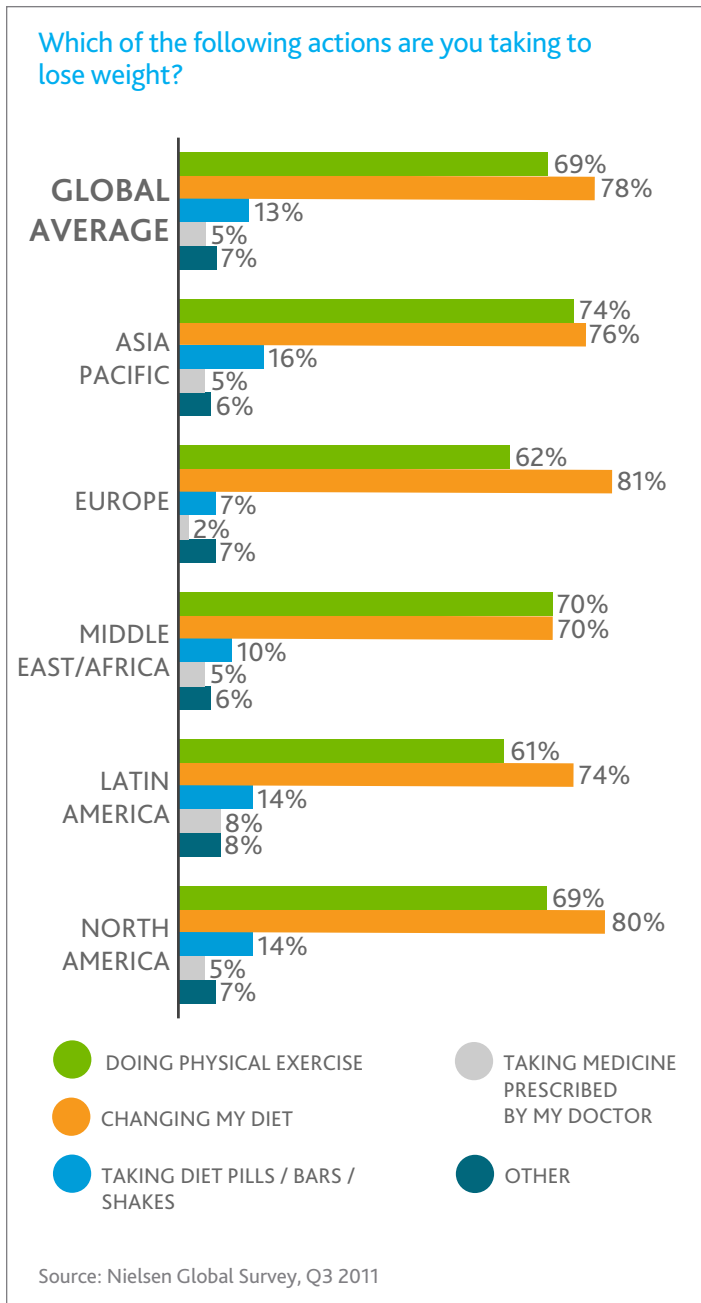
what they are eating? Not necessarily. The study finds that half (52%) of consumers around the world understand nutritional information panels on food packaging only in part. Four-of-10 consumers understand nutritional labels "mostly" and seven percent say they do not understand them at all.

And what about trust—do consumers believe that claims on product packaging are accurate and truthful? Here too is ambiguity in the minds of consumers. Of 10 different product claims studied, only three received a complete believability rating by more than 20 percent of consumers (calorie content 33%, vitamin content 28% and fat claims 23%), highlighting a need to better educate consumers.



## Healthy Eating is a Conscious Choice

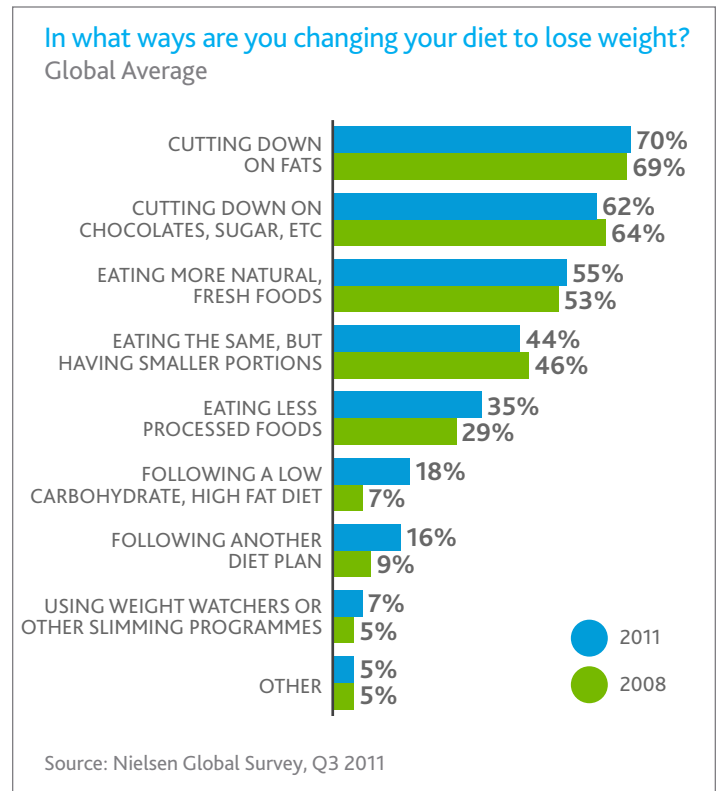
It turns out that no matter what region of the world consumers hail from, there is a strong consensus about how to lose weight. Dieting is the most popular method among more than three-quarters (78%) of global online respondents, followed closely by engaging in physical exercise (69%). The age-old method of diet and exercise to drop weight reigns supreme as consumers indicated by the comparatively low percentages of respondents using alternative methods, such as taking diet pills/medicine or eating/drinking bars and shakes.



Diet fads come and go, and what is popular one year can be quickly replaced by another craze the next. From counting calories and macrobiotic diets to liquid protein fasts and low-carbohydrate/high protein plans, weight-management solutions have the power to not only alter waist lines, but to influence the food industry as well.

The most popular way to shed unwanted pounds according to 70 percent of global online respondents is cutting down on fats. Trimming back on chocolates and sugary foods (62%) and eating more natural, fresh foods (55%) round out the top three ways consumers are changing their diets. In fact, using these tried and true methods has remained virtually unchanged from three years ago, according to Nielsen's 2008 report.

Other ways to slim down include eating smaller portions (44%), eating less processed foods (35%), following a low-carbohydrate/high-fat diet (18%), which had more than doubled since 2008, following another diet plan (16%), or using a slimming program (7%).



And when it comes to considering what is healthier—a product with no artificial additives with full sugar or one that has artificial substitutes but reduced in calories, almost half (48%) of global respondents say neither. However, of the two options, the no artificial additives/full sugar choice (29%) is favored over the artificial substitutes/reduced calorie option (15%).

## Full Understanding of Nutritional Labels is Low

As different labeling standards and regulations proliferate in different markets, some packaged-food producers have adopted global practices, and some observers have called for international guidelines. But while nutritional labels are increasingly found on packaged foods across the globe, a primary question is whether consumers understand the information in the first place.

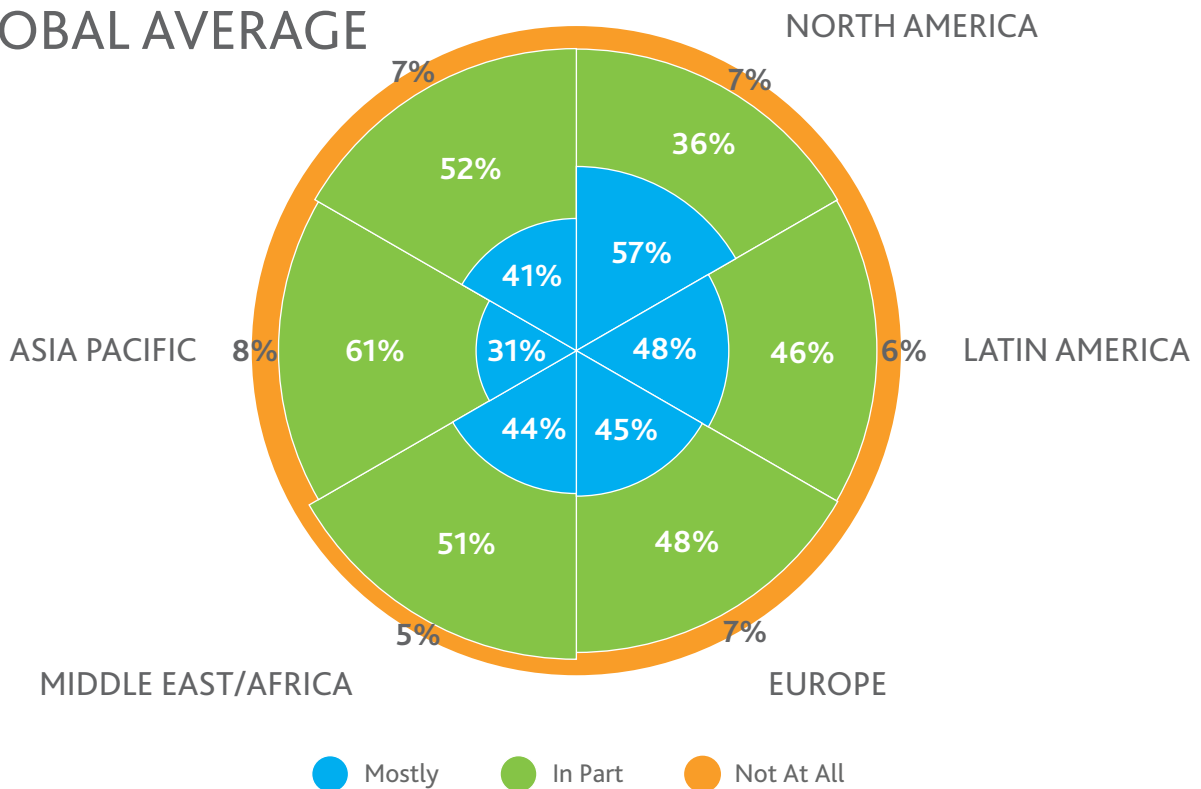
According to Nielsen's study, nearly six-in-ten (59%) global respondents indicate they have difficulty grasping the nutritional facts, with 52 percent understanding the labels "in part", and seven percent not understanding them at all. Forty-one percent of global respondents understand nutritional information found

on food labels "mostly", down from 44 percent in a 2008 Nielsen report.

Consumers in North America show the most confidence in understanding nutrition labels, as nearly six-in-ten (57%) regional respondents indicate that they mostly understand the details. This is largely driven by U.S. respondents, as consumers in the U.S. appear more comfortable with the labels than Canadians. Fully 58 percent of U.S. respondents report mostly understanding the information, compared to 49 percent of Canadians.

How well do you understand the nutritional information panels/labels on food packaging?

### GLOBAL AVERAGE



Source: Nielsen Global Survey, Q1 2011

## Full Understanding of Nutritional Labels is Low

The Asia Pacific region shows the lowest percentage of consumers with a full understanding of nutrition labels, with less than one-third (31%) mostly comfortable with the information. Both globally and within the region, food label confusion is highest in the Chinese-speaking world and other Southeast Asian markets. Just around one-fifth of consumers in Taiwan and Hong Kong (20% and 21%, respectively) and one-quarter of respondents from China and South Korea (25% each) indicate they mostly understand the nutritional labeling.

However, among Asia Pacific markets, reported understanding of food labels is much higher in India, Australia, and New Zealand, where over half of consumers say they mostly understand nutritional data—among the highest reported levels in the study.

Asia Pacific consumers report the lowest levels of understanding nutritional labels, especially in Greater China and other Southeast Asian markets.

Consumers from India, Australia, and New Zealand indicate a much higher comfort level with the labels.

How well do you understand the nutritional information panels/labels on food packaging?	Mostly	In Part	Not at all
Taiwan	20%	69%	11%
Hong Kong	21%	68%	11%
China	25%	68%	7%
South Korea	25%	67%	8%
Thailand	27%	64%	9%
India	52%	37%	11%
Australia	52%	43%	5%
New Zealand	51%	41%	8%

Source: Nielsen Global Survey, Q1 2011

As a whole, European consumers are largely split, with 45 percent reporting a strong understanding of nutritional labels. But, consumers in certain markets within Europe are far more comfortable with labeling than others. Sixty percent of Portuguese respondents largely understand nutrition labels, the highest reported country in the study. Similarly, at least half of respondents mostly understand food labels in Italy and Romania (59%), Poland (58%), Denmark and Ireland (53%), Sweden (51%), and Spain (50%).

Within Europe, French consumers are the least likely to understand nutrition labels, with only three-in-10 (31%) indicating full comprehension of the information; 58 percent of French respondents understand only part of the information and 11 percent of French consumers say they do not understand them at all. Other markets in Europe with lower levels of nutritional label understanding include Czech Republic (where 39 percent mostly understand it, but 12 percent don't understand it at all), Hungary, Belgium, Austria, and Russia.

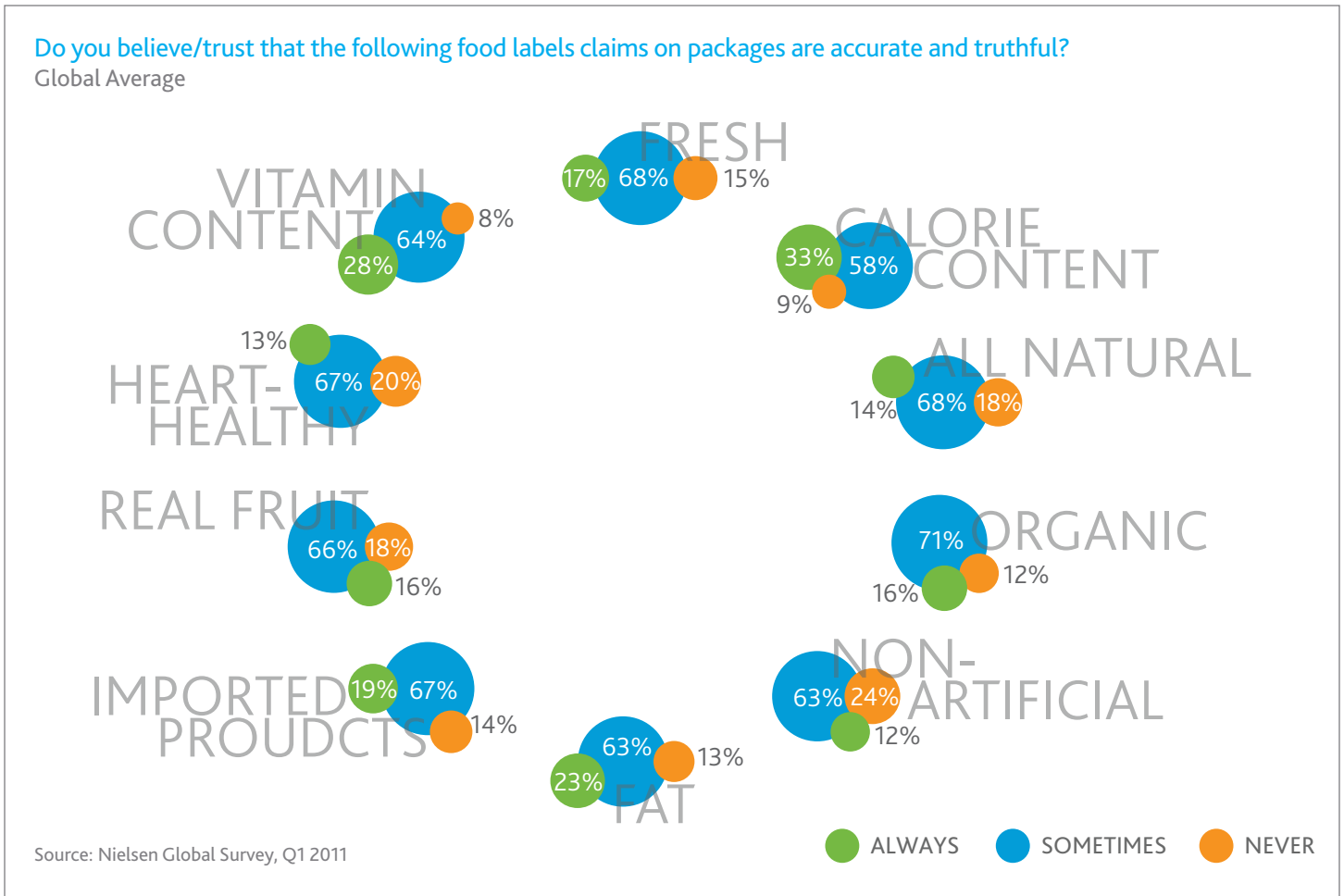
In Latin America, over half of online respondents in Brazil (52%) and Mexico (51%) say they mostly understand nutritional labels, but in Argentina and Colombia, consumers are much less familiar with the information. In Argentina, 45 percent of consumers understand most of the data—but 11 percent do not understand it at all. Only 33 percent of Colombian respondents report a firm grasp on what the labels mean, and 12 percent of their compatriots do not understand them at all.

Among the Middle East and African markets in the survey, South Africans are the most confident dealing with nutritional labels, with over half (53%) largely familiar with reading the data. Saudi Arabian consumers are much less comfortable with food labels, as only 36 percent understand most of the information. In Egypt and the United Arab Emirates, slightly less than half of consumers (47% each) are confident in deciphering the data.

## Consumers are Skeptical about Health Claims

Beyond the detailed nutritional information often found in small print on the back of packaging, marketers often include larger, more prominently displayed health-related claims, such as “low fat” or “all natural”, on the front of packaging to boast healthy ingredients.

The study finds that global respondents are largely skeptical about the accuracy and believability of these health claims. Across 10 nutritional content categories studied, large majorities (at least over two-thirds) of global respondents in the survey indicate they believe the nutritional claims are either never or only sometimes trustworthy.



Generally, the most simple and straightforward content claims (calorie counts, vitamin content, fat content) garner the most confidence. Calorie counts are the most trusted, with 33 percent of respondents believing calorie content claims as always accurate, and 58 percent finding them sometimes accurate. The concrete ingredient-based attributes of vitamin and fat content are the second and third most trusted claims, respectively.

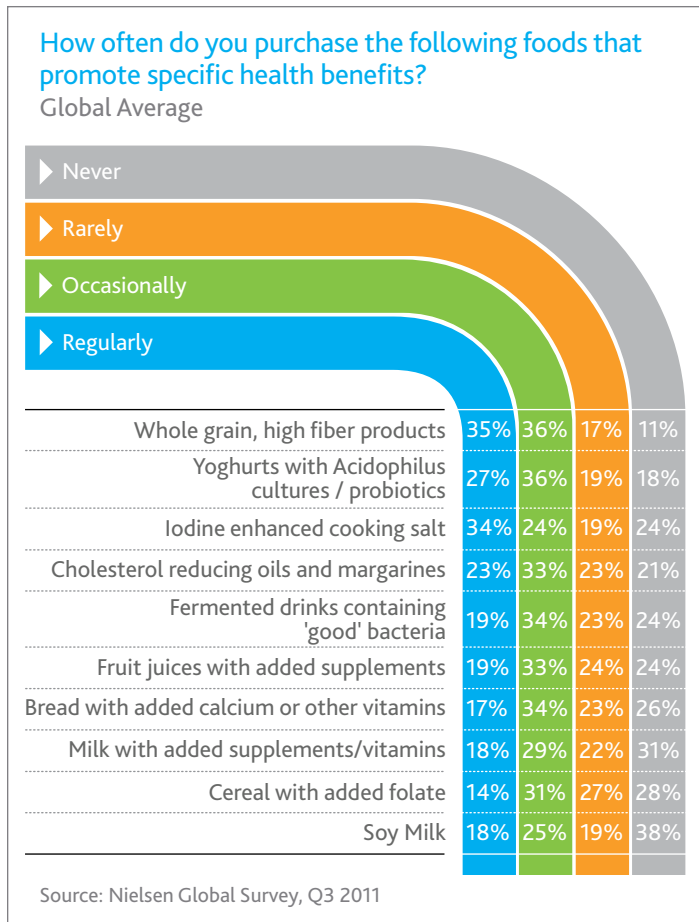
Perhaps more challenging for marketers is the reported belief consumers indicate for more ambiguous, less-defined attributes like freshness, all natural claims, and heart-healthy assertions. On average, only 15 percent of global respondents rate these types of claims an “always accurate”. Upwards of 80 percent of respondents indicate either never or only sometimes consider

these assertions as believable.

Overall, Latin American consumers indicate the most trust in packaging health claims across the 10 nutritional and content categories surveyed, according to an average reported number of consumers who believe the claims as always accurate. By this measure, an average of 22 percent of Latin American online respondents found the claims always accurate or truthful—compared to a global average of 19 percent. Consumers from the Middle East/Africa and Asia Pacific were the second most likely to trust the labels, at an average 20 percent always believing the claims, followed by consumers in Europe (19%), and North America (16%).

## Hearty Options Vary for a Healthy Diet

Local tastes and cooking practices differ around the world, often defining the foods found in a shopping basket, but when it comes to how frequently consumers say they purchase foods that promote specific health benefits, there are both marked differences and some similarities.



Most consumers around the world agree there are benefits to eating whole grain/high fiber foods to promote a healthy diet. More than one-third (35%) of global respondents say they purchase whole grain/high fiber products on a regular basis, 36 percent state they buy these foods occasionally and one-in-ten (11%) indicate that they never purchase these foods. Yogurts with acidophilus cultures/probiotics are also popular among 27 percent of regular and 36 percent of occasional shoppers. In fact, both of these foods appear in the top five of all the regions studied.

However, differences by region reflect customs and traditions unique to local palates. For example, while soy milk ranks fourth on the list of products purchased regularly and occasionally in Asia Pacific, it takes a position of last of 10 different health-benefit foods studied in Europe, Middle East/Africa, Latin America and second to last in North America. Similarly, cholesterol-reducing oils and margarines are more popular in Latin America (73%), Middle East/Africa (71%) and North America (64%), where respondents say they purchase these foods regularly/occasionally.

Fruit juices with added supplements are most popular in Middle East/Africa, as three-quarters of respondents (74%) indicate they purchase these products regularly/occasionally. And bread with added calcium or other vitamins is a regular/occasional pick among roughly six in 10 consumers in Asia Pacific, Middle East/Africa and North America—compared with about half of Latin Americans and one-fourth of Europeans.

### Top 5 Health-Benefit Foods Purchased Regularly/Occasionally

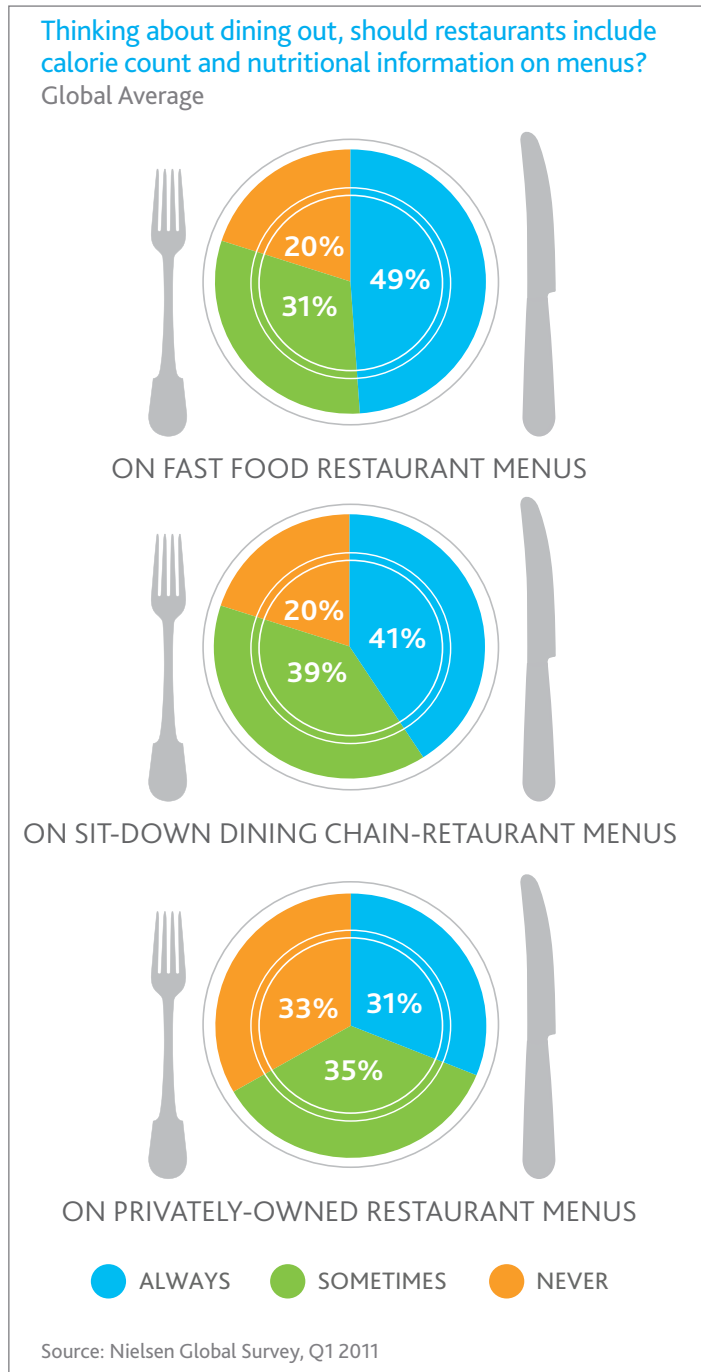
	Asia Pacific	Europe	Latin America	Middle East/Africa	North America
1.	Yoghurts with Acidophilus	Whole Grain/High Fiber Products	Whole Grain/High Fiber Products	Fruit Juices with Supplements	Whole Grain/High Fiber Products
2.	Fermented Drinks	Iodine Enhanced Cooking Salt	Cholesterol Reducing Oils/Margarines	Cholesterol Reducing Oils/Margarines	Cholesterol Reducing Oils/Margarines
3.	Whole Grain/High Fiber Products	Yoghurts with Acidophilus	Yoghurts with Acidophilus	Whole Grain/High Fiber Products	Bread with Added Calcium/Vitamins
4.	Soy Milk	Cholesterol Reducing Oils/Margarines	Cereal with Folate	Iodine Enhanced Cooking Salt	Fruit Juices with Supplements
5.	Bread with Added Calcium/Vitamins	Fermented Drinks	Fruit Juices with Supplements	Yoghurts with Acidophilus	Yoghurts with Acidophilus

Source: Nielsen Global Survey, Q3 2011

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## Diners Want Calorie-Counting Information

Consumers around the world express strong support for the inclusion of calorie counts on restaurant menus. This belief is highest for fast food restaurants, but there is also support for this practice in certain full-service restaurants. Regionally, consumers in Latin America, North America, and Europe are most interested in knowing calorie information while dining out.



Support for calorie information on restaurant menus is highest for fast food restaurants, with half (49%) of global respondents believing fast food restaurants should always include calorie information on menus, and an additional 31 percent thinking fast food locales should sometimes do so. By contrast, 20 percent of global online consumers think fast food menus should never include calorie or nutritional data.

More than six-in-ten (64%) Latin American respondents and over half of both North American (56%) and European (53%) consumers believe fast food menus should always have calorie information. In Asia Pacific markets, there is slightly less demand for fast food calorie counts, but 42 percent of regional respondents still believe these menus should include calorie measures. Respondents in the Middle East and Africa are slightly less explicit in their beliefs about calories and fast food menus. Only 28 percent say calories should always be listed at fast food establishments and 55 percent believe the information should only sometimes be on menus.

Support for calorie and nutritional information on menus at full-service chain restaurants is also quite strong, though less pronounced than for fast food businesses. Globally, 41 percent of online respondents believe these restaurants should always post calorie counts, 39 percent think they should sometimes, and 20 percent don't think it is necessary. While there is less of a global consensus for these sit-down chain restaurants, there are still high percentages of consumers who think these establishments should always disclose their calorie counts in Latin America (59%), North America (46%), and Europe (41%).

Global consumers are much less convinced about whether privately-owned, non-chain restaurants should include calorie and nutritional data on menus. For these independent restaurants, 31 percent of global respondents would prefer to always know calorie counts, but 33 percent think these establishments should never have to disclose these numbers. However, a still robust 40 percent of North American respondents want these private restaurants to print caloric figures. And, Latin American consumers remain resilient in their desire for nutritional data, with nearly six-in-ten (58%) still always wanting the information on independent restaurant menus.

### Call to Action

Consumers around the world have healthy eating on their minds and consumer packaged goods (CPG) marketers have an opportunity to help. Consumer-friendly nutritional labeling can be a powerful marketing tool as consumers are hungry for easy-to-understand information. Clearly there is a need and an opportunity for more education to help reduce the skepticism that is apparent around all parts of the globe. And there is a need to offer tasty and healthful options to satisfy both the mind and body.

## Countries in the Study:

Argentina  
Australia  
Austria  
Belgium  
Brazil  
Canada  
China  
Chile  
Colombia  
Croatia  
Czech Republic  
Denmark  
Egypt  
Estonia  
Finland  
France  
Germany  
Greece  
Hong Kong

Hungary  
India  
Indonesia  
Ireland  
Israel  
Italy  
Japan  
Latvia  
Lithuania  
Malaysia  
Mexico  
Netherlands  
New Zealand  
Norway  
Pakistan  
Peru  
Philippines  
Poland  
Portugal

Romania  
Russia  
Saudi Arabia  
Singapore  
South Africa  
South Korea  
Spain  
Sweden  
Switzerland  
Taiwan  
Thailand  
Turkey  
United Arab Emirates  
United Kingdom  
Ukraine  
United States  
Venezuela  
Vietnam

## About the Nielsen Global Survey

The Nielsen Global Survey of Food Labeling Trends was conducted in March/April 2011 and in August/September 2011 and polled more than 25,000 consumers in 56 countries throughout Asia Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on their Internet users, and is weighted to be representative of Internet consumers and has a maximum margin of error of  $\pm 0.6\%$ . This Nielsen survey is based on the behavior of respondents with online access only. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or 10M online population for survey inclusion. The Nielsen Global Survey, was established in 2005.

## About Nielsen

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands. For more information, visit [www.nielsen.com](http://www.nielsen.com).

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