

# The Food Industry, Consumers & Effective Nutrition Communication

---

Hank Cardello  
Chair  
Portion Balance Coalition  
December 5, 2025

**Business for Impact**

*GEORGETOWN UNIVERSITY*  
McDONOUGH SCHOOL of BUSINESS



# No Disclosures

---







# Communications Principles

**Must motivate the consumer that needs nutritional assistance**

- **Policymakers often expect the least healthy to behave like them**

**Don't treat all "bad" products the same**

**Consider more than traditional nutrition markers (e.g., added sugars)**

**Emphasize Taste - by far is the most important factor for consumers**

# Consumers Vary Widely on Health & Wellness

---



# Consumers Are Not “One-Size-Fits-All”

## WELL BEINGS®



28%

- Most health pro-active
- First adopters
- Use many health modalities

## FENCE SITTERS®



26%

- “Wannabe” healthy
- Highly aspirational
- Price sensitive

## FOOD ACTIVES®



12%

- Mainstream healthy
- Basics: balance and control
- Desire inherently healthy foods

## MAGIC BULLETS®



22%

- Lack commitment to healthy lifestyle
- Quick, easy solutions
- Health managers

## EAT, DRINK & BE MERRYS®

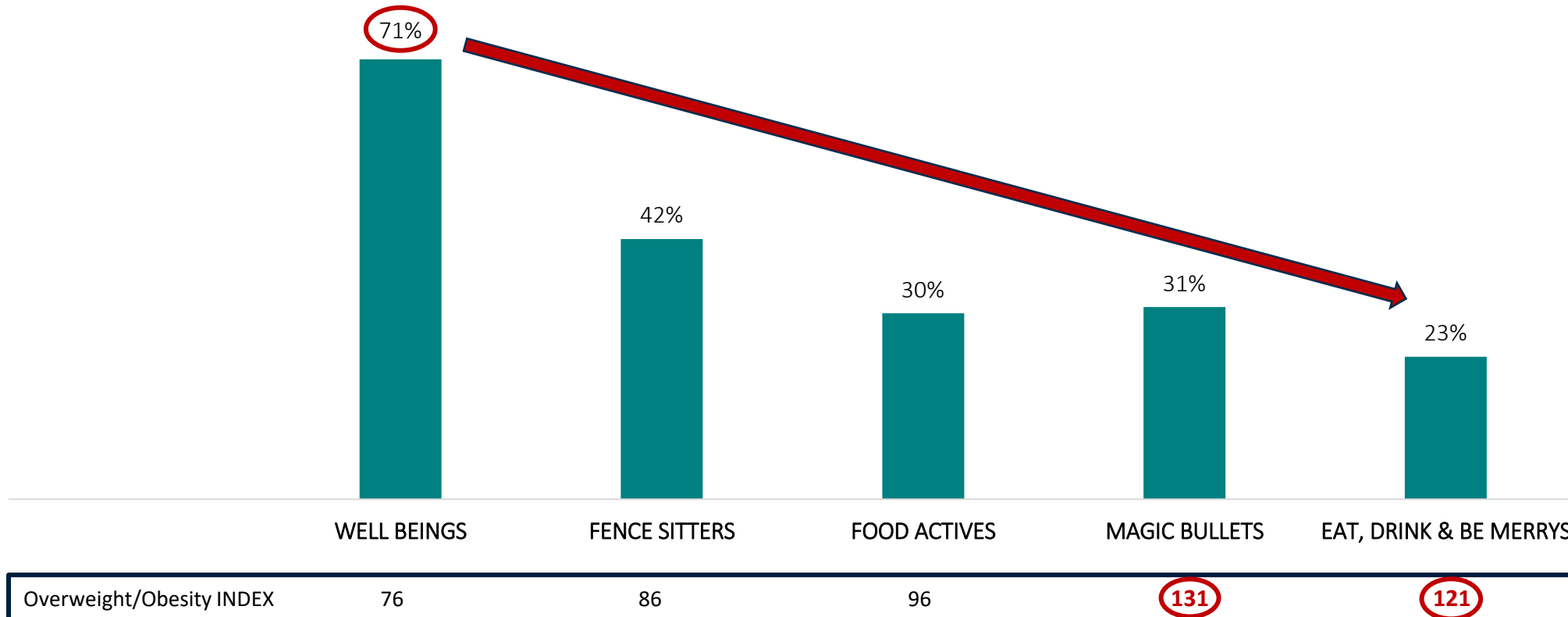


12%

- Least health active
- Little health motivation

# Higher BMI Cohorts Are the Least Influenced by Nutrition Info on Pack

Average % indicating nutrition facts labels, ingredient lists and health claims always/often influence their purchases





© 2005 Blackwell Publishing Ltd *Journal of Internal Medicine* 258: 105–112



# Differences Across Indulgent Product Purchasing Behaviors...Except for Candy

Purchase INDEX	Healthy Weight	With Obesity	GAP vs. Healthy Weight
Diet soda	84.4	123.6*	+39.2
Regular soda	92.3	119.3*	+27.0
Packaged pastries/ Baked goods	94.0	115.2*	+21.2
Cookies	95.4	110.4*	+15.0
Potato & other chips/ pretzels	95.6	110.3*	+14.7
Packaged ice cream	96.8	110.2*	+13.4
Non-chocolate candy	102.3	109.2	+6.9
Chocolate candy	99.3	101.0	+1.7

\*significant finding versus Healthy weight individuals



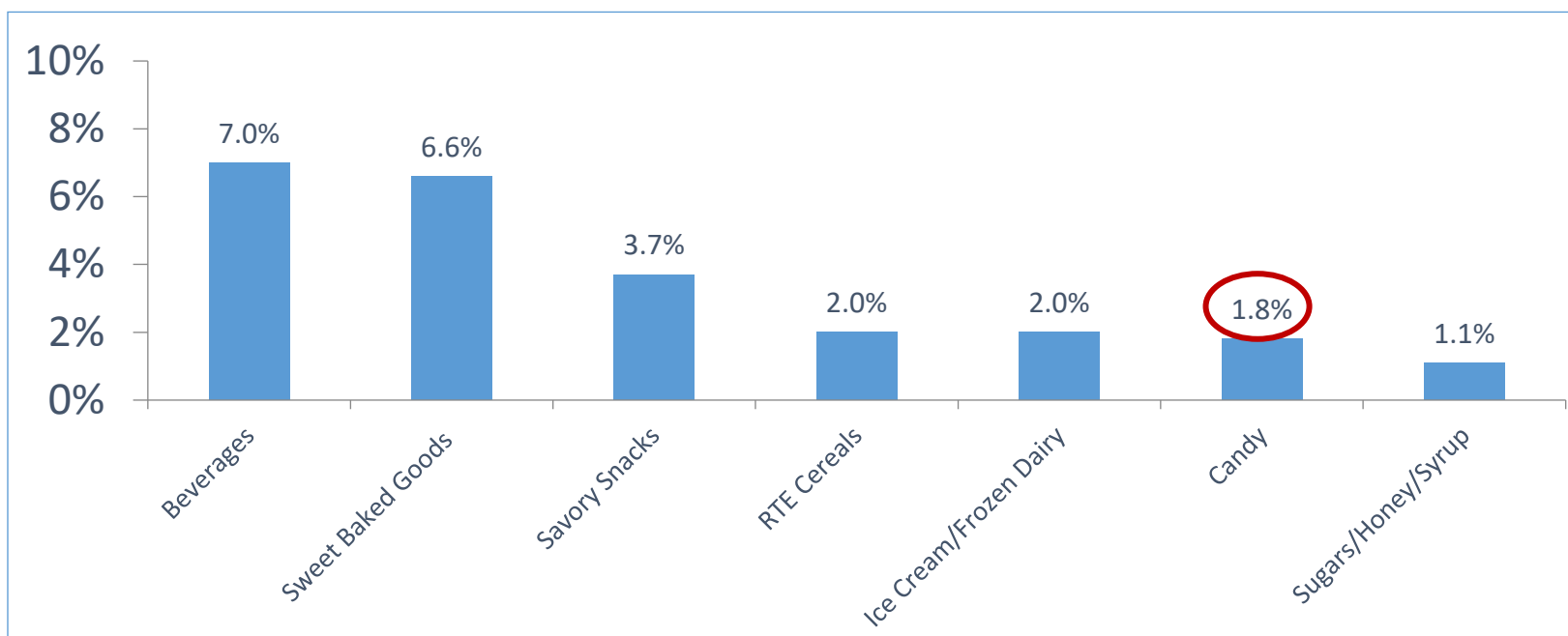
# Candy Is Purchased at Similar Frequencies Across All Consumer Segments

- **EXCEPTION:** Eat, Drink & Be Merry's (= lowest % at healthy weight)

	PURCHASE INDEX (=100 for General Population)				
	Well Beings	Food Actives	Fence Sitters	Magic Bullets	Eat, Drink & Be Merrys
TOTAL Candy	101	107	103	100	83*
Milk/Dark Chocolate Candy	106	108	100	101	78*
Non-Chocolate Candy	98	116	99	103	87*

\* Statistically significant at 95% confidence interval

# Candy Contributes Less Than 2% of Calories



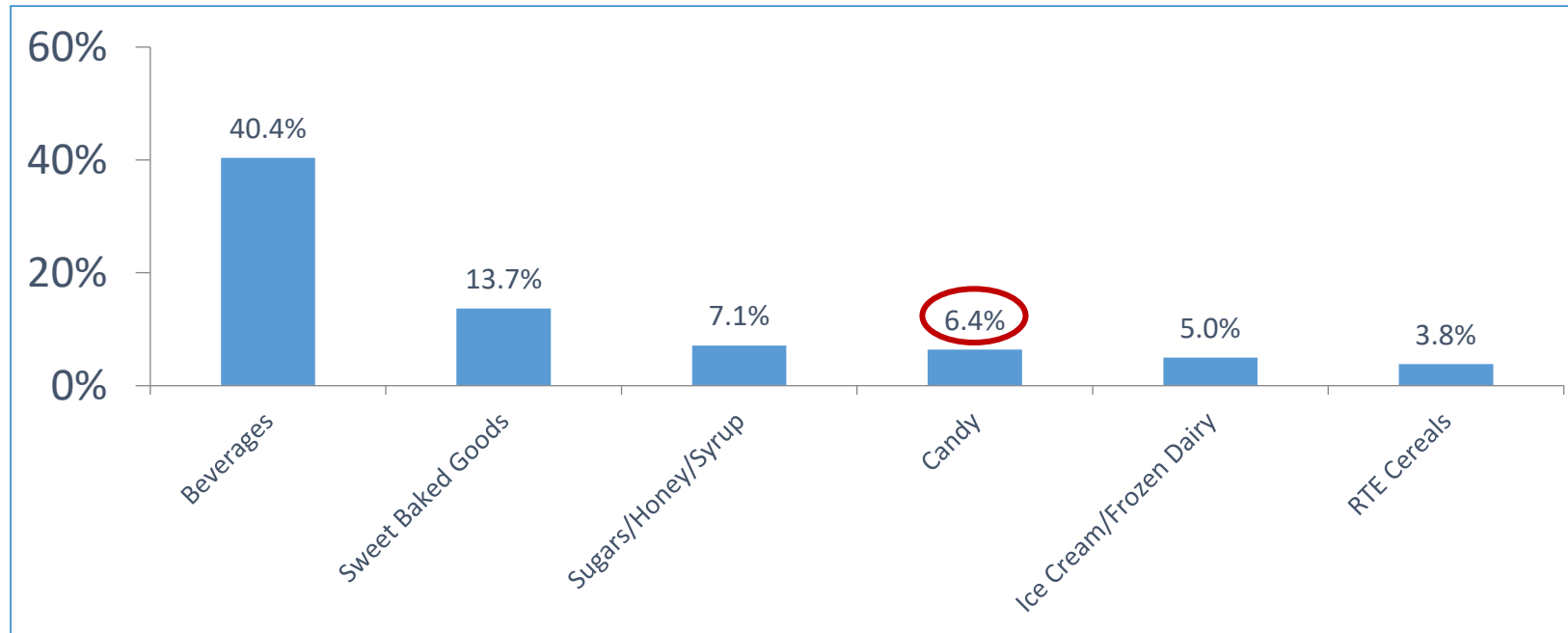
**Beverages:** Sugar sweetened beverages (soda; sport/energy drinks; fruit drinks; smoothies/grain/nutritional beverages); tea; coffee

**Sweet Baked Goods:** Cakes; pies; cookies; brownies; donuts; sweet rolls; pastries

**Candy:** Chocolate and non-chocolate confectionery products

Source: NHANES 2017-March 2020, ages 2+

# Candy Accounts for only 6.4% of Added Sugars



**Beverages:** Sugar sweetened beverages (soda; sport/energy drinks; fruit drinks; smoothies/grain/nutritional beverages); tea; coffee

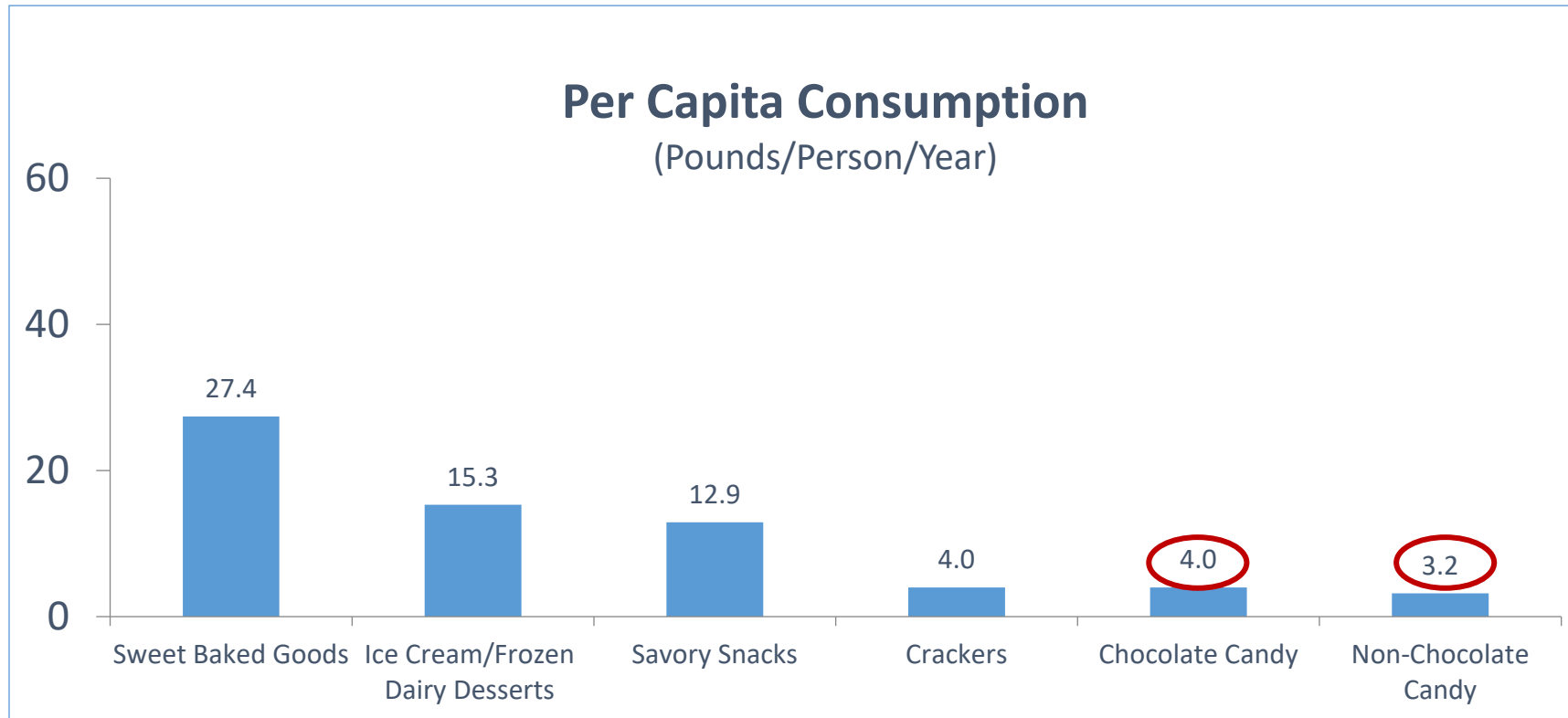
**Sweet Baked Goods:** Cakes; pies; cookies; brownies; donuts; sweet rolls; pastries

**Candy:** Chocolate and non-chocolate confectionery products

Source: NHANES 2017-March 2020, ages 2+



# Number of Pounds of Candy Consumed Annually is Low



**Sweet Baked Goods:** Cakes; pies; cookies; brownies; donuts; sweet rolls; pastries

**Savory Snacks:** Potato chips; tortilla/corn/other chips; popcorn; pretzels/snack mix

Source: NHANES 2017-March 2020, ages 2+

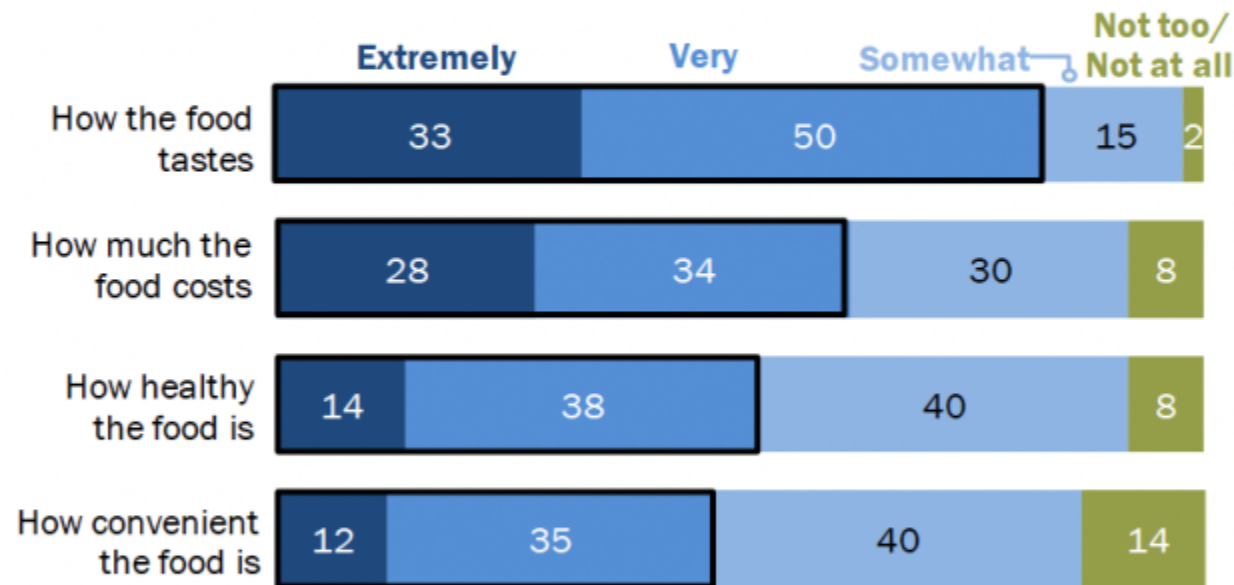
\_\_\_\_\_



# Taste is Key for Messaging

## Taste matters most to Americans when deciding what food to get – then cost, healthiness and convenience

*% of U.S. adults who say that in general, each of the following is \_\_\_ important to them when deciding what food to get*



Note: Respondents who did not give an answer are not shown.

Source: Survey of U.S. adults conducted Feb. 24-March 2, 2025.

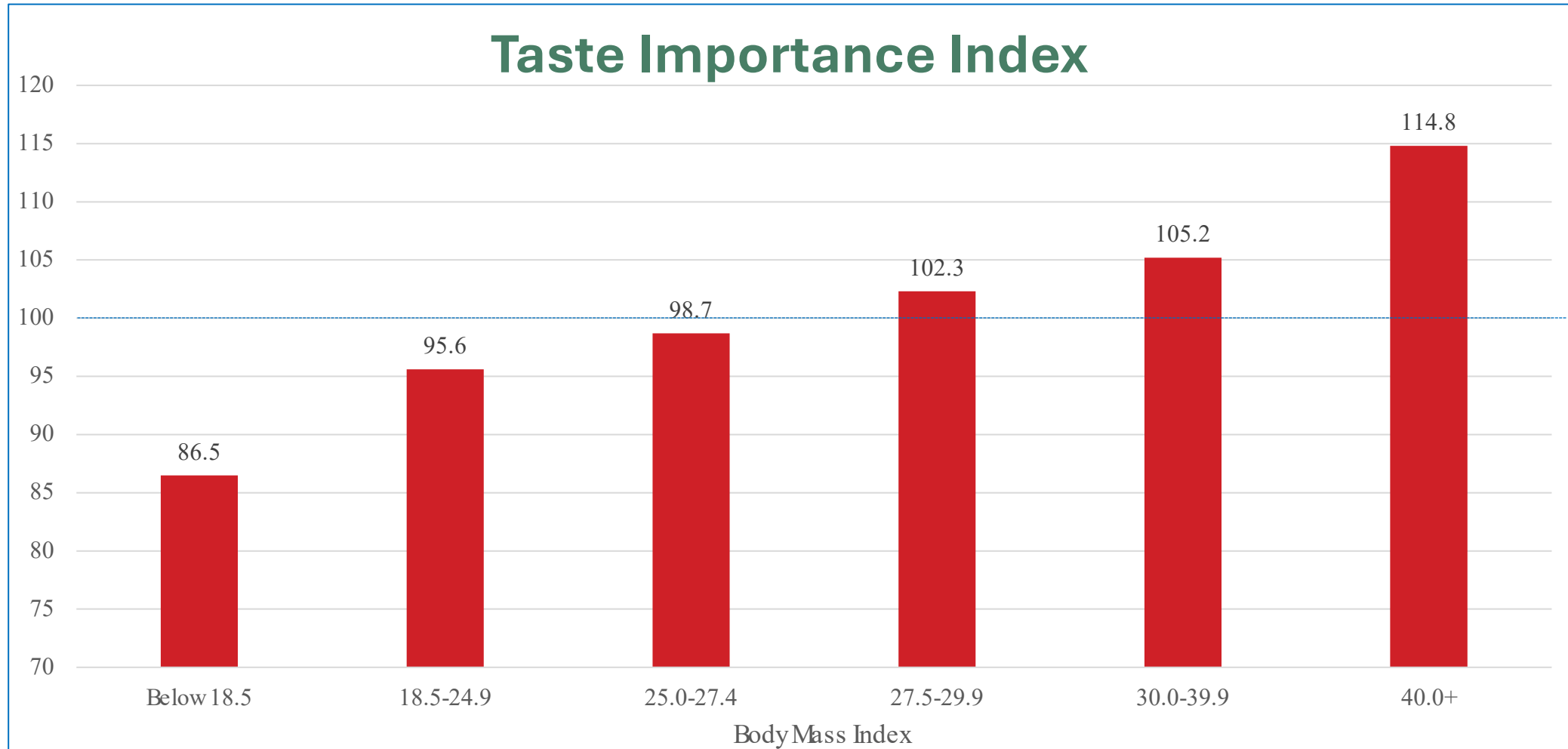
"Americans on Healthy Food and Eating"

**PEW RESEARCH CENTER**

<https://www.pewresearch.org/science/2025/05/07/americans-on-healthy-food-and-eating/>



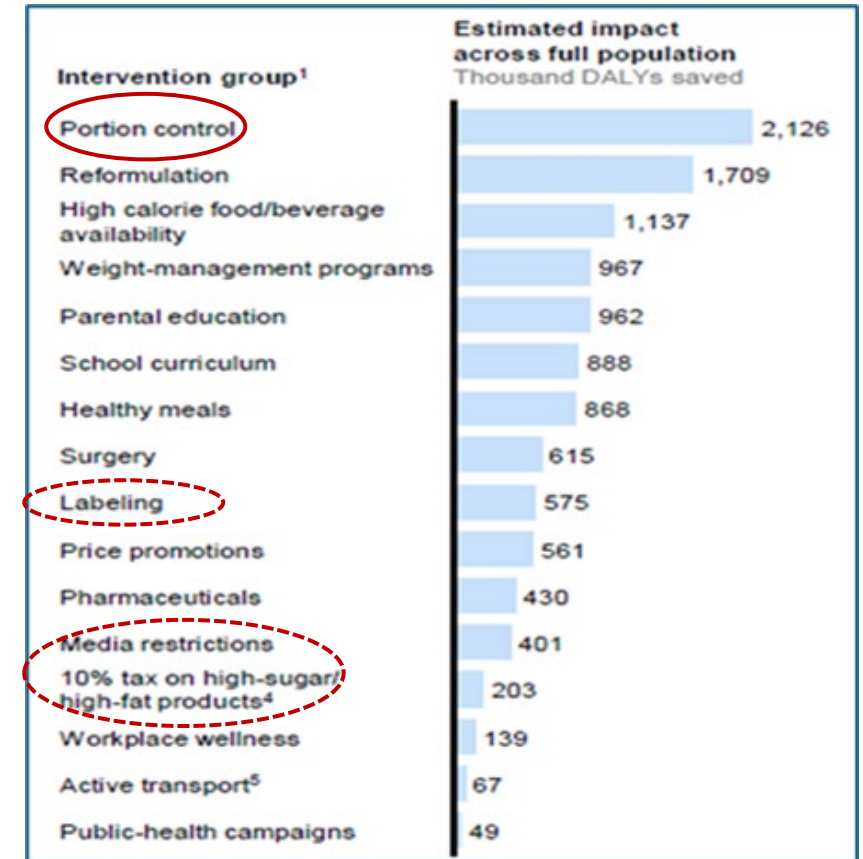
# Taste Is Even More Important for Higher BMI Segments



Source: Natural Marketing Institute H&W Trends Database; Q.59 – Most important attributes when selecting foods & beverages that household consumes

# Actions That Can Be Taken

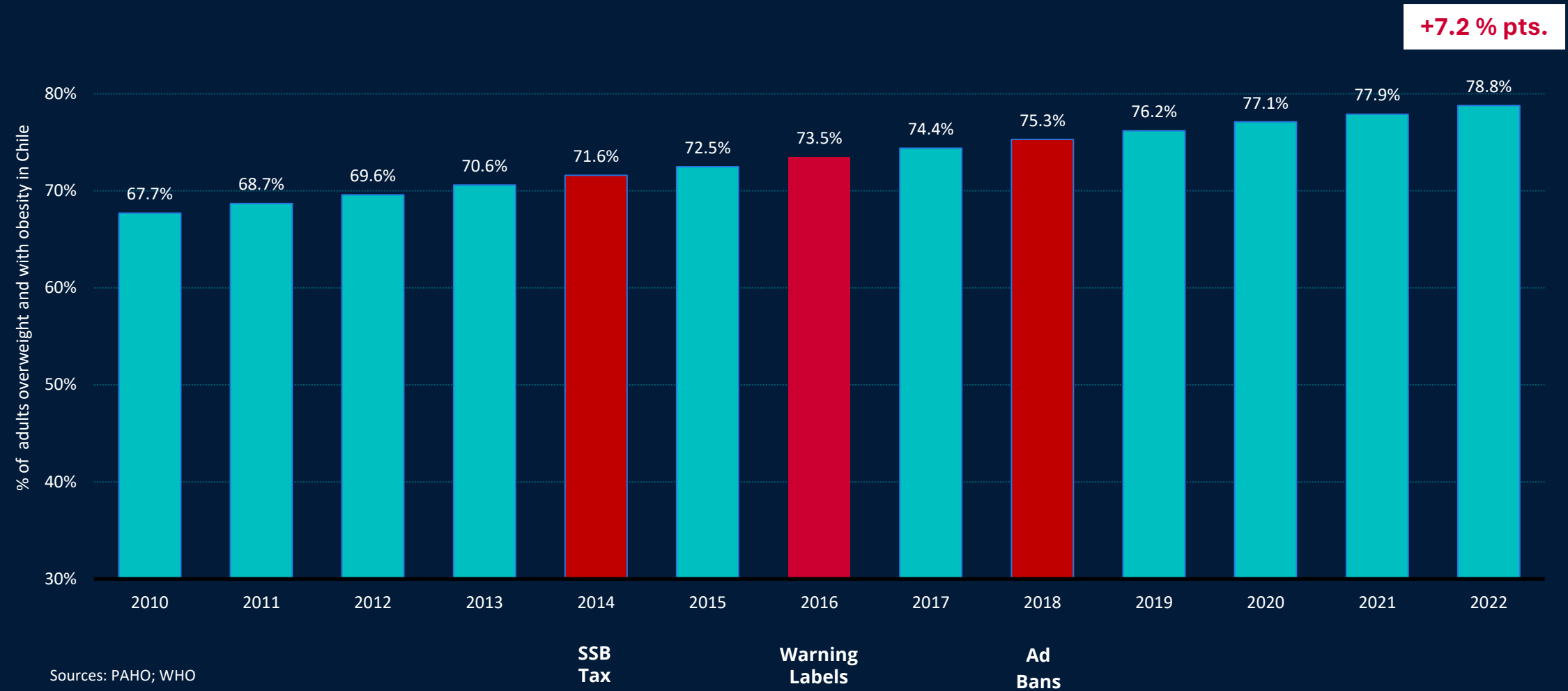
- Lead with Taste, not Healthy, in communications to less healthy consumers
- Avoid frontal assaults to persuade consumers to eat healthier
  - “Stealth health” – improve health without telling anyone
  - Portions – a strategy for indulgent/ultra-processed foods
    - Up to 1/2 of Indulgent Product Consumers Are Practicing Portion Balance Behaviors
    - Portion Control the #1 effective intervention (McKinsey)



Source: Overcoming obesity: an initial economic analysis; McKinsey & Company, November 2014

DALY = disability-adjusted life year

# Upward Trend in Adult Overweight and Obesity in Chile Continues





# Actions That Can Be Taken

- Lead with Taste, not Healthy, in communications to less healthy consumers
- Avoid frontal assaults to persuade consumers to eat healthier
  - “Stealth health” – improve health without telling anyone
  - Portions – a strategy for indulgent/ultra-processed foods
    - Up to 1/2 of Indulgent Product Consumers Are Practicing Portion Balance Behaviors
    - Portion Control the #1 effective intervention (McKinsey)
- 21<sup>st</sup> century PSA advertising; Tag 1-2% of ads/communications with eat healthier messaging



Source: Overcoming obesity: an initial economic analysis; McKinsey & Company, November 2014

DALY = disability-adjusted life year

# Thank You!

## The Food Industry, Consumers & Effective Nutrition Communication

---

Hank Cardello  
December 5, 2025

**Business for Impact**

GEORGETOWN UNIVERSITY  
McDONOUGH SCHOOL of BUSINESS

