

IDPH – Vending Research Phase Two Report

BACKGROUND

The IDPH is planning to implement vending policies in Iowa worksites to help combat obesity by creating a more supportive nutritional environment in the workplace and rest areas where workers and travelers have an opportunity to make healthy choices when using vending machines. Phase One of the research to support this initiative gathered information for a foundational understanding of current vending machine habits, beliefs, motivations and attitudes among the target audiences. Phase One informed the development of creative executions to be tested in this phase of the research.

This report covers the testing of four potential concepts to determine the strongest execution that has the most relevance, persuasion and overall communication power with the target audiences.

METHODOLOGY AND AUDIENCES STUDIED

Three audiences were recruited to participate in online discussion boards held over July 27-28th, 2011. This methodology enables gathering a geographically diverse audience from across the state of Iowa and encourages participation because respondents can log in to participate at their convenience.

Target Audience Segments	# Respondents
White Collar	12
Blue Collar	15
Rest Area	14
Total Respondents	41

These respondents were recruited from a variety of sources that included additional employees of companies that hosted onsite visits in Phase One, signs posted in rest areas and the technology facility database.

Respondents first discussed their overall approach to health and nutrition and their current use of vending machines. Then each group evaluated four concepts individually to give feedback on message clarity, relevance and persuasion. Finally, each respondent selected their favorite concept, taking into account the IDPH goal of communicating the labeling vending snacks green, yellow or red.

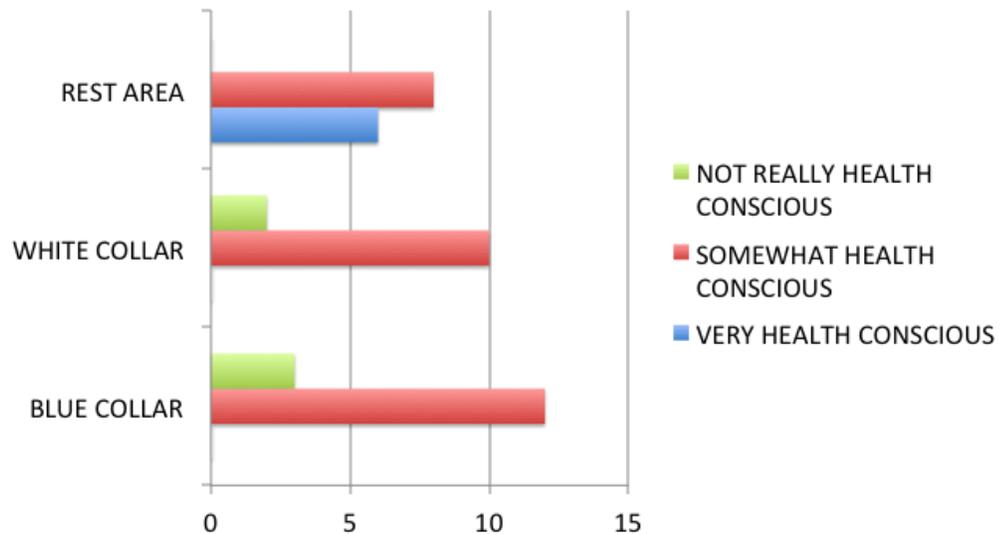


The food and beverage standards are divided into color codes based on their nutrition profiles.

- RED food and beverages are not as healthy and fall outside the Dietary Guidelines for Americans.
- YELLOW food and beverages are healthy foods that meet the Dietary Guidelines, but do not provide a serving of fruit, vegetable, low-fat dairy or whole grain.
- Food and beverages in the GREEN category are considered the healthiest, are consistent with the Dietary Guidelines for Americans and provide a serving of fruit, vegetable, low-fat dairy or whole grain.

Please note: All numerical summaries are **qualitative only** due to small sample sizes, meant as directional summaries and are **NOT** statistically significant.

SNAPSHOT OF RESPONDENT SELF-ASSESSED HEALTH CONSCIOUSNESS



- Respondents were asked to categorize their own level of health consciousness, as well as give an example of why they thought of themselves that way. Many mentioned efforts to eat better and exercise regularly. Some also said they were well versed in nutrition and exercise but didn't necessarily act on that knowledge consistently. Qualitatively, it seemed that some of the white collar respondents "graded" themselves a bit harder, in that they were most likely to say they were "somewhat health conscious" but then the examples of their habits were similar to those of the "very health conscious" category.

"I believe in moderation. I allow myself everything in moderation – I exercise regularly, etc., so it all balances out in the end." – White Collar Respondent

"I think it is best to eat healthy and exercise, but I sort of feel like eating tasty food is a reward for hard exercise." – White Collar Respondent

"Trying to be more health conscious. Try to walk every day and stay active when I get home from work instead of just sitting on the couch." – White Collar Respondent

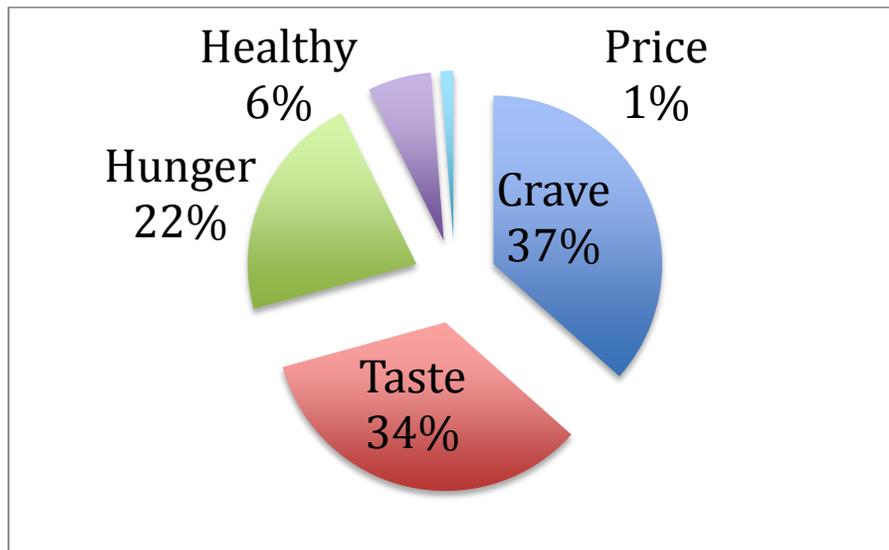
- Roughly half of white collar consumers said they would consider healthiness of vending options at least some of the time. Of rest area respondents, 57% say NO; they do not consider nutritional factors, while 36% say they do think about nutrition when visiting a rest area vending machine. Blue collar respondents in this study were more divided, with 44% saying they do NOT think about nutrition, 31%

sometimes giving it consideration and just 25% saying they do think about nutrition when making a vending machine purchase.

KEY INSIGHTS:

There was consistency in consumer attitudes and beliefs from phase one foundational research that appeared as major themes in this phase of the research as well.

- Nutrition and health are NOT top of mind when consumers approach a vending machine. Respondents were asked to rank key factors influencing their choice when at the vending machine. The chart below reflects their top two considerations across all respondents. Nearly three-quarters of respondents said their top two considerations were feeding a craving or the taste of the product. Just 6% said a healthy product choice was in their top two considerations. In fact, for an overwhelming majority, healthiness of the snack was the last factor considered, or not considered at all.



- These factors are partially driven by the expectation of the non-nutritive environment of most vending machines. Consumers do not expect to find healthy choices when they go to the vending machine so that gives them a default “permission” to choose a less healthy snack.

“I don’t think the vending machine is the time or the place to worry about nutrition.” – Blue Collar Respondent

“I try to pick healthy items sometimes it’s hard in a vending machine.” – Blue Collar Respondent

“I already know buying it (candy bar) that it isn’t the best option. But that is what’s available...” – White Collar Respondent

“If it’s to the point that I’m eating something out of the vending machine, I’m usually more concerned with satisfaction vs. sweating over the label.” – White Collar Respondent

“We only live once and if a Snickers gets me across Iowa I’ll eat it!” – Rest Area Respondent

- Some respondents did mention they avoid vending machines because there are not healthier choices or that they leave empty-handed because nothing meets their needs.

RECOMMENDATIONS:

- MIX IT UP garnered the most positive responses overall with nearly 6 in 10 respondents saying it worked best to communicate the snack rating system clearly. This concept should move forward to Phase Three in-market testing.

Concept	1 st Choice	2 nd Choice
Mix It Up	57%	27.5%
Revolution	11	10
Fuel Dot	16	25
TGIF	16	25
NO second favorite	n/a	12.5

- Though some respondents did take the icons in the poster quite literally and commented that their vending machines did not stock apples, the piece did seem to remind respondents of the ideas of overall nutrition and incorporating more “smart choices” into their daily eating whenever possible.
- This concept seemed to do the most to bring forth an expectation that vending machines could stock different items and they then could make different choices for themselves. It likely is the most powerful in helping to open the dialog with suppliers and raising expectations of what the future of the vending environments may look like, therefore, resetting consumer expectations at a higher level than their current view of vending as a “nutritional desert”.
- Vending companies need to consider missed sales opportunities with the current product assortment. There are a significant number of comments spread across all target audiences throughout the discussion regarding the lack of healthy options that people would like to see in their vending environments.

CONCEPT FEEDBACK: MIX IT UP



- This concept was the strongest performer overall. Respondents liked that it illustrated examples of foods, which made the color coding system very clear.
- Respondents said the main message was focused on encouraging people to choose better snacks at least some of the time. Generally, most respondents felt the message was appropriately targeting them, though a few felt it was targeting kids.
- Many noted they had never seen vending machines with healthy options stocked in them, though they wished it were more often the case.

“It seems like it’s encouraging you to make smarter choices at the vending machine. It seems to be prioritizing fruits and vegetables.” – White Collar Respondent

“Fruits and vegetables are the healthiest and the poster shows that eating foods from each color can be good as long as you “mix it up” and don’t overdo one of the colors, especially the reds.” – White Collar Respondent

“I would pick green 90% of the time...I wish a vending machine actually looked like that and had those choices.” – White Collar Respondent

“...the message they are going towards is that you should not always choose the junk food, but ‘mix it up’ with your choices to include some of the healthier options.” – Blue Collar Respondent

“Popcorn, apples, carrots and orange slices – stuff that I know I haven’t ever seen in my vending machine.” – Blue Collar Respondent

“The color coding seems to want to make it easier to tell at a glance what items are the healthiest in the machine. The green items, fruit, vegetables, peanuts would be healthiest.” – Blue Collar Respondent

“The main message is to show you different food groups to choose from – from healthy groupings to not so healthy. The fresh fruit is the healthiest **but you don’t find fruit in the vending machines.**” – Rest Area Respondent

“...the poster is trying to emphasize better snacking choices for a healthier lifestyle.” – Rest Area Respondent

- When asked “If this were to appear on a vending machine you approached, would it influence your decision on what to purchase?” The responses for each segment are categorized below.

	Yes, would influence	Maybe would influence	No, would not influence
White Collar	63%	27%	10%
Blue Collar	27%	33%	40%
Rest Area	43%	43%	14%

- As might be expected given the blue collar segment’s reticence to pay attention to nutrition in general, they are the least likely to be influenced by the messaging. HOWEVER, please note that it is still a majority (60%) of blue collar who say that they would be influenced or *might be* influenced by the messaging.

CONCEPT FEEDBACK: REVOLUTIONARY



- This concept was the weakest performer; due in part to the guilt-inducing nature of the messaging caused many respondents to turn away from it.

- Most respondents got the main idea that vending machines items would be color-coded, however, this concept also drew attention to two additional ideas: sugar crash and weight loss, which diluted the strength of the main message.

(The main message is) “You can lose weight if you chose the healthiest snacks.” – White Collar Respondent

“Feel guilty for unhealthy snacking!” – White Collar Respondent

“Main message is to cut down on sugar.” – Rest Area Respondent

“Eating healthy foods make you feel brighter and more alert. Green foods are the best, then yellow, then red.” – Rest Area Respondent

- This concept was less persuasive, with a majority of respondents saying that it would not influence their thinking or vending machine purchase. This was not generally tied to the person in the photo, as he seemed relatable to many of the respondents. A few female respondents wished for a female in the picture instead, and a few older respondents wished for someone a bit older. Several respondents felt the poster was “trying too hard” to be funny, clever, or cool.

“The person on the poster wouldn’t influence my thinking – although now I am beginning to wonder why the person in the poster felt that he needed to lose weight as he seems VERY skinny. I would relate to him – I have LOTS of friends just like him (kinda nerdy and not just because of the glasses.)” – Blue Collar Respondent

“I could relate to him if I met him on the street because he seems like your Average Joe.” – Blue Collar Respondent

“I think the intent is to portray him as an “everyman” but the glasses make him look dangerously close to a hipster.” – White Collar Respondent

“He doesn’t influence my thinking, but I do feel I could relate to him.” – Rest Area Respondent

- When asked “If this were to appear on a vending machine you approached, would it influence your decision on what to purchase?” The responses for each segment are categorized below.

	Yes, would influence	Maybe would influence	No, would not influence
White Collar	36%	10%	54%
Blue Collar	13%	13%	74%
Rest Area	20%	27%	53%

CONCEPT FEEDBACK: FUEL DOT



GREEN IS GOOD STUFF. RED IS NOT AS GOOD. YELLOW IS IN-BETWEEN.
MIX YOUR COLORS. BALANCE YOUR SNACKS. (JUST LIKE YOU BALANCE YOUR MEALS.)

- Respondents understood the basic “something green will fuel my day” for the most part, though several felt it was confusing and they only “got it” because they had been exposed to other concepts earlier in the discussion.
- This concept was not deemed very persuasive in helping respondents to consider healthier choices.
- It also seemed to give tacit approval to choosing some snacks if consumers are willing to accept the consequences, such as a “sugar crash”.

“I think this says a little bit of sugary foods are okay if you need a sugar fix.” – Rest Area Respondent

“Main message is that different foods have different consequences, you shouldn’t be living off of red or yellow snacks. The healthiest options would be the green foods.” – Rest Area Respondent

“The green foods give you a lot more energy to get you through the day. Green foods are the healthiest foods to choose.” – Rest Area Respondent

“...that something green will fuel my day. Based on this poster, I have no clue what foods would be healthiest.” – Blue Collar Respondent

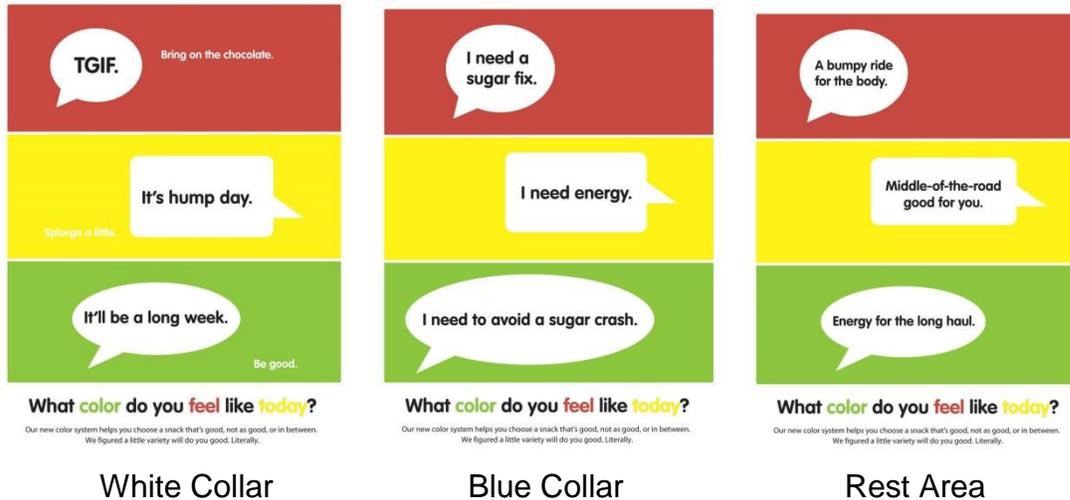
- When asked “If this were to appear on a vending machine you approached, would it influence your decision on what to purchase?” The responses for each segment are categorized below.

Fuel Dot Concept	Yes, would influence	Maybe would influence	No, would not influence
White Collar	46%	27%	27%
Blue Collar	20%	27%	53%
Rest Area	14%	36%	50%

- It is likely this concept performed fairly well with the white collar segment because they are more attuned to nutritional information in general when using

their vending machines. In addition, the message may appear to have a work-related context that made it less relevant to the rest area segment.

CONCEPT FEEDBACK: TGIF – THREE VERSIONS, TAILORED TO AUDIENCE



White Collar Feedback

- Several white collar respondents noted that the explanation at the bottom of the poster was very important in clarifying the message of the overall poster and explaining the color coding system.
- A few said they don't really see their week that way, if anything, indulgences were more likely to happen at the beginning of the week because Monday and Tuesday were often the hardest for them.
- Overall, the feedback on this poster was split for white collar respondents. A few loved it and some really disliked it.

Blue Collar Feedback

- This poster did not seem to engage the Blue Collar Respondents and was not persuasive to them, though they did understand the main idea.

Rest Area Respondents

- These respondents said the main message was what you eat influences how you feel and that "green foods" are healthiest and give you the most long lasting energy.
- It was deemed as straightforward and simple by many of the rest area respondents.
- This concept was generally liked, but not as the favored execution.
- When asked "If this were to appear on a vending machine you approached, would it influence your decision on what to purchase?" The responses for each segment are categorized below.

	Yes, would influence	Maybe would influence	No, would not influence
White Collar	36%	0%	64%
Blue Collar	13%	27%	60%
Rest Area	14%	57%	29%

- This concept worked well with the rest area contingent which may be a function of the specific messaging targeting on that version of the concept.