Executive Summary

Consumer Reaction to Calorie Disclosure On Menus/Menu Boards In New York City

By:

TECHNOMIC INC.

Project Number 13109
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Background and Methodology

Earlier this year (2008), New York City passed a law requiring that restaurant chains with more than 15 locations nationwide must list calories on their menus or menu boards. Technomic, Inc., designed a study to survey consumer awareness and reaction to the law.

An on-line survey was conducted August 27-29, 2008 with 299 consumers who live in the five New York City boroughs. Demographics are provided on the following page.
Demographics

Gender:
- Male: 48%
- Female: 52%

Age:
- 18-24: 8%
- 25-34: 19%
- 35-44: 24%
- 45-54: 23%
- 55-65: 26%
- Other: 9%

Race:
- White: 65%
- Black: 19%
- Asian: 7%
- Other: 9%

Latino:
- Yes: 13%
- No: 87%

Income:
- <$35K: 21%
- $35K-$49.9K: 20%
- $50K-$99.9K: 37%
- $100K+: 22%
Awareness levels were consistent across gender and age groups over 24; 18-24 year olds were less likely to be aware of the law.

- Whites were more likely to be aware of it than non-whites (85% vs. 70%).
- Those earning over $50,000 annually were more likely to be aware (84% vs. 75%).
Consumers Generally Think the Law is Positive

Responses were consistent across demographic groups.

Those aware of the law prior to the survey were considerably more likely to think it was positive (90% vs. 68%).
Consumers Who Think it’s Positive Want to be Informed

Why [do you think it’s a positive move]? 
*Base = 257*

- **I want to be informed when I make choices in restaurants**: 70%
- **It can’t hurt to have the information available**: 64%
- **The law will help improve public health**: 60%
- **Restaurants would otherwise be unwilling to disclose this information**: 39%

Groups responded similarly with the following exceptions:

- 35-44 year olds were more likely to want to make informed choices (80%) and note restaurants would not share the information otherwise (47%).
- 45-54 year olds (71%) and non-whites (72%) indicated the information couldn’t hurt.
- Those with incomes over $50,000 want to make informed choices (74%) as do those who were aware of the law (73%).
Those Against it Want to Make Their Own Decisions and Consider it too Much Regulation

Why [don’t you think it is a positive move]?

Base = 42

- I can make my own nutrition decisions: 67%
- This is too much government regulation: 64%
- I want to have a treat when I am dining out without the guilt: 33%
- I don’t like the way it looks/ it’s too cluttered: 19%
Many Have Read the Information When Visiting Restaurants

Have you visited any restaurants which have complied with this law and have posted calorie counts on their menus or menu boards?  
*Base = 299*

- Yes: 64%
- No: 36%

Do you read the nutrition information now listed on menus?  
*Base: Have visited = 192*

- Yes: 84%
- No: 16%

- Those 35-44 were more likely to have visited (73%) and read (90%) the information.
A Huge Majority are Surprised by the Calorie Counts and Find Them Higher Than Expected

Have you been surprised by the calorie counts?
Base: Have read calorie information = 161

- Yes: 84%
- No: 16%

Are they higher than expected?
Base: Surprised by calorie content = 136

- Yes: 97%
- No: 3%
Close to 75% of Consumers Think the Information Has Made Some Impact on Their Ordering

How much of an impact has nutrition information on menus impacted your ordering behavior?
*Base: Have visited restaurants that post calories = 192*

- **A great deal**: 30%
- **Somewhat**: 43%
- **Not Really**: 15%
- **Not at All**: 12%

The following were more likely to indicate it has made “a great deal” of impact:
- Women (36%)
- 25-34 year olds (41%)
- 35-44 year olds (38%)
- 45-54 year olds (37%)
- Non-whites (39%)
- Income over $50,000 (35%)
Please rate your agreement with the following statements

Base: Listings have made a great deal or somewhat of an impact = 161

<table>
<thead>
<tr>
<th>Statement</th>
<th>Somewhat Agree</th>
<th>Completely Agree</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am seeking out and ordering lower calorie alternatives</td>
<td>45%</td>
<td>45%</td>
<td>90%</td>
</tr>
<tr>
<td>I am no longer ordering certain items</td>
<td>45%</td>
<td>38%</td>
<td>83%</td>
</tr>
<tr>
<td>I am seeking out and buying smaller portions</td>
<td>43%</td>
<td>31%</td>
<td>74%</td>
</tr>
<tr>
<td>I am buying fewer foods and beverages from restaurants</td>
<td>40%</td>
<td>23%</td>
<td>64%</td>
</tr>
</tbody>
</table>

4-point scale: Completely Agree (4) – Completely Disagree (1)

*Numbers may not add due to rounding*
Most Who Have Not Been Impacted Report Being Able to Make Nutrition Decisions and Already Eat Healthfully

Please rate your agreement with the following statements:
*Base: Listings have "Not Really" or "Not at All" impacted ordering = 51*

- I can make my own nutrition decisions and already eat healthfully
  - Somewhat Agree: 39%
  - Completely Agree: 53%
  - Total: 92%

- I am not concerned with healthful eating when I eat food away from home
  - Somewhat Agree: 51%
  - Completely Agree: 18%
  - Total: 69%

- I consider foods from restaurants to be a treat so I don't care about calories
  - Somewhat Agree: 33%
  - Completely Agree: 33%
  - Total: 66%

4-point scale: Completely Agree (4) – Completely Disagree (1)
*Numbers may not add due to rounding*
Consumers Want Nutritional Disclosure and Think It Will Impact Public Health and Nutrition

Please rate your agreement with the following statements:

*Base: All Respondents = 299*

<table>
<thead>
<tr>
<th>Statement</th>
<th>Somewhat Agree</th>
<th>Completely Agree</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fat content should also be posted more prominently</td>
<td>40%</td>
<td>46%</td>
<td>86%</td>
</tr>
<tr>
<td>Sodium content data should also be posted more prominently</td>
<td>40%</td>
<td>45%</td>
<td>85%</td>
</tr>
<tr>
<td>Nutritional information on menus will have a positive impact on overall health and nutrition</td>
<td>42%</td>
<td>42%</td>
<td>85%</td>
</tr>
<tr>
<td>Nutritional information on menus is helpful when I am making ordering decisions</td>
<td>36%</td>
<td>47%</td>
<td>84%</td>
</tr>
<tr>
<td>I know how many calories I need in a day</td>
<td>39%</td>
<td>35%</td>
<td>75%</td>
</tr>
<tr>
<td>I do not want to see prominent nutrition information on menus or menu boards</td>
<td>20%</td>
<td>11%</td>
<td>31%</td>
</tr>
</tbody>
</table>

4-point scale: Completely Agree (4) – Completely Disagree (1)

*Numbers may not add due to rounding*
Consumers Anticipate Governments will - and Should - Become More Involved in Regulating Health and Nutrition Concerns

Please rate your agreement with the following statements:
*Base: All Respondents = 299*

1. I expect that national, state and local governments will become more active in regulating health and nutrition concerns in restaurants
   - Somewhat Agree: 53%
   - Completely Agree: 30%
   - Total: 83%

2. National, state and local governments should play a more active role in regulating health and nutrition concerns
   - Somewhat Agree: 43%
   - Completely Agree: 30%
   - Total: 73%

3. Government action is necessary to combat unhealthy eating habits
   - Somewhat Agree: 36%
   - Completely Agree: 26%
   - Total: 62%

4-point scale: Completely Agree (4) – Completely Disagree (1)
*Numbers may not add due to rounding*
Consumers Think Restaurants Have a Responsibility to Respond to Nutritional Concerns

Do restaurants have a responsibility to respond more aggressively to consumer nutritional concerns?  

*Base = 299*
Consumers Think Restaurants Need More Options and Regulation

**Do you think restaurants...?**

_Base: All Respondents = 299_

- Need more low calorie options
  - Yes: 81%
  - No: 19%

- Need more small-portion options
  - Yes: 68%
  - No: 32%

- Need more regulation when it comes to the foods/ingredients they use and serve
  - Yes: 63%
  - No: 37%