

Obesity in the Public Eye

Research report on perceptions in the global media of obesity and its causes



GLOBAL RESEARCH PROTECTING BRANDS AND REPUTATION

Introduction

Will obesity be the global epidemic of the 21st century as alarming headlines claim?

According to media perceptions obesity is certainly a defining characteristic of the so-called modern world - along with stress and depression and other lifestyle health problems such as diabetes, cancer and heart disease. The future is not encouraging, warn the experts. As the research conducted by Echo Research shows, anxieties about obesity are growing fast. In the US it has been on the media agenda for several years now, but there are increasing concerns about the disorder in other regions such as Western Europe and in Asia Pacific, where globalisation, consumerism and new lifestyle habits mix to make the perfect cocktail for weight gain.

As some 9,000 global media items tell us, children are the first victims. 30% in the US are already overweight and experts predict that youngsters in Europe and in Asia Pacific are already following the same trend. The implications of this for health services, the economy in general, and the ways we live, relate and work together in our societies are significant.

The media have long been targeting "junk food", food manufacturers and fast food chains with their high concentration of fat, salt and sugar in snacks, chocolate bars and fizzy drinks. But, simply, we are still absorbing more calories than we burn. Physical activities are highly recommended but they don't seem to be at the top of our list nor do they blend well with alcohol, cigarettes and stress.

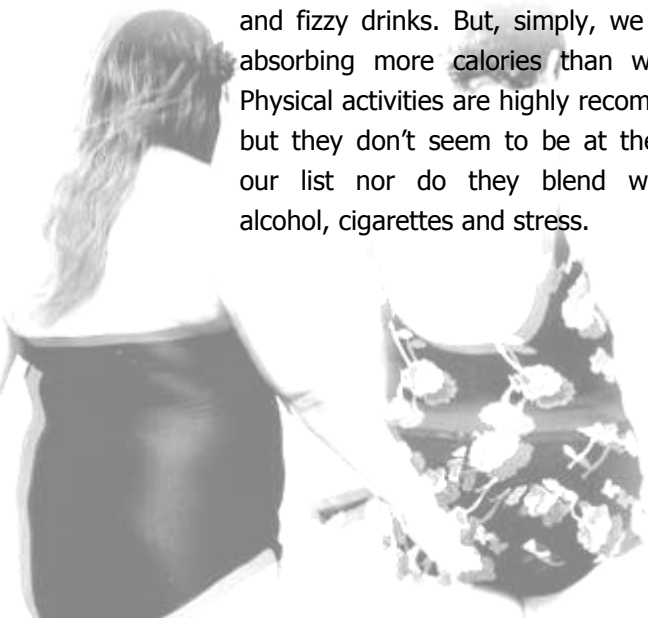
So what actions are to be taken? Is obesity the responsibility of others, as the US media suggests, with the predictable implications for sanctions and litigation? Do we need preventive measures and add a "pinch of fat tax" to the recipe as health professionals recommend in France? Or do we regulate TV advertising, as UK politicians urge?

Just as there is a confusion of messages about the causes and the possible solutions, there are also cultural differences on ways forward. And this seems to characterise the diversity of the actors debating the issue. In the UK and in Asia Pacific, politicians in general and the government in particular are joining health professionals at the forefront of the debate on obesity. In the US, where the issue has long lived, educators sustain the issue on the media agenda, whereas in France medical professionals carry the alarm.

What follows is a more detailed look at what and how opinion formers in the US, the UK, France and Asia Pacific report on obesity. Our objective is more to understand the agenda, key influencers and drivers and to give an overview of the debate on this issue than to explain it. We hope the research will provide valuable insights into this problem and help to progress a collective effort to redress the tide.

Methodology

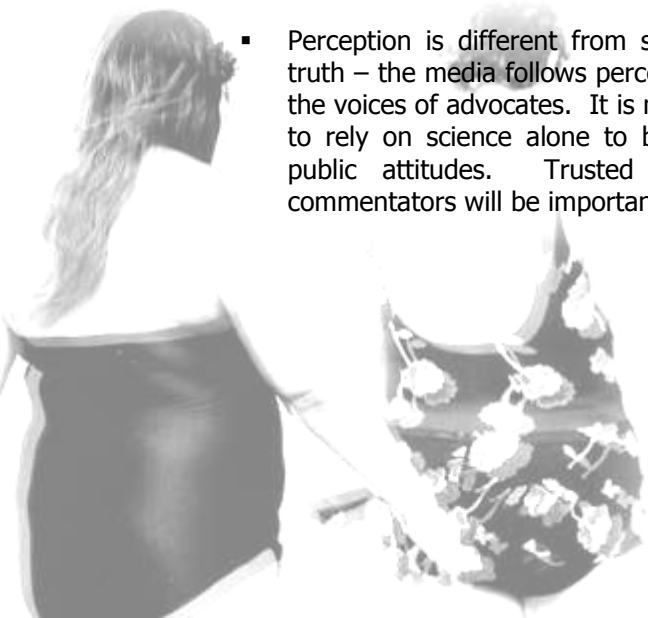
This research was conducted by Echo Research as a collaborating partner with the IBLF and HEAL Global Partnership. Echo analysed some 9,000 news items supplied by **Factiva**, from France, the US, the UK and Asia Pacific published between April 2003 and March 2004. Articles appeared in daily, business and consumer magazines.



Key Findings and Conclusions

So what do we know about obesity from media perceptions around the world? Are high fat and high sugar diets to blame - do we need to get more active and watch less TV? Do we need to blame women for working away from home or our employers for high stress levels that have an impact on our cravings for snacking and cholesterol? Is the answer a new diet? Are we over-exposing the world to Western fast food and fizzy drinks?

- Echo's research shows beyond doubt that the issue of obesity is on the increase amongst opinion leaders with corresponding growing media interest worldwide.
- Obesity is a perfect media issue because it involves dangers, personalities and something that affects everyone in a personal way.
- Children are the focus of society's protective interests, in which the media share, and schools are perceived as having an important role in restructuring behaviour.
- The shadow of diabetes and cancer lay over the 'fat epidemic'.
- In terms of solutions, a widening circle of social stakeholders has a role to play. Companies have here a golden opportunity to show their responsibilities to society.
- No magic cure is being proposed for obesity. But the media often focus on simplified problems and solutions to a complex disorder.
- Perception is different from science and truth – the media follows perceptions and the voices of advocates. It is not possible to rely on science alone to balance out public attitudes. Trusted third-party commentators will be important.
- Much blame is being apportioned. Global companies with high-profile brand names are at the centre of the description of the problem as well as the solution. Individual responsibility is a far more difficult concept to get across, and bad news gets higher profile coverage than good.
- Answers are being sought and opinion leaders will feed into the political process in each country in accordance with that country's inclination towards regulation, litigation or prevention/education.
- For those involved in the obesity issue – as companies, health professionals or policy makers - there are some important messages in Echo's research. Those wishing to broaden the debate and focus on the true complexity of factors will have to engage in a major effort to "educate" the media.
- Companies have the disadvantage of a lack of trust on these issues, compared with campaigning groups who are assumed to be acting for a higher purpose.
- Governments and regulators will tend to seek popular approval to act on issues where the public expresses concern such as advertising to children, vending in schools and labelling.
- The whole debate looks set to continue to be more skewed towards calories in (food and eating) than calories out (exercise and sport).



Obesity on the increase

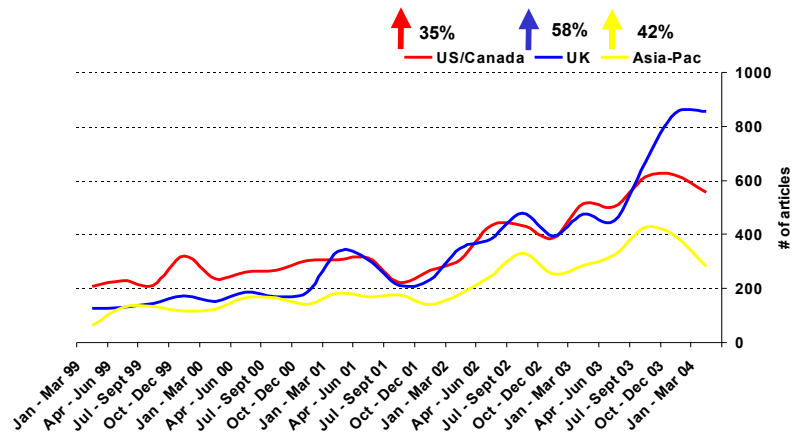
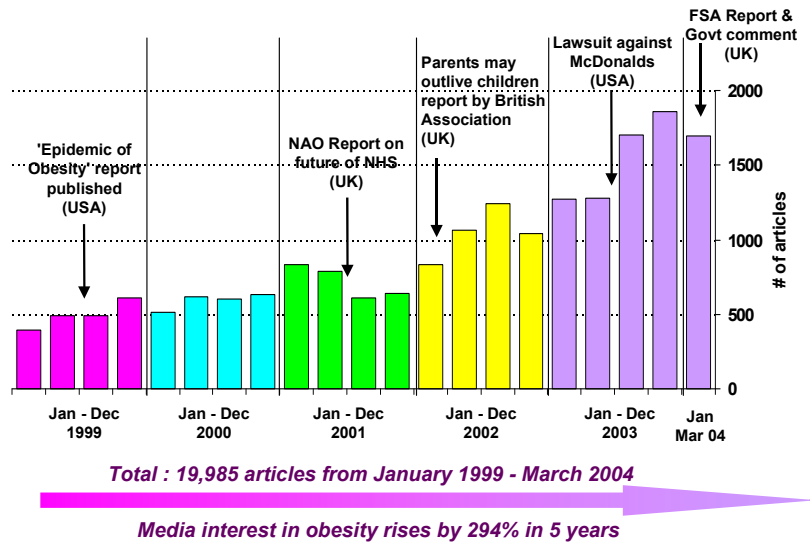
Obesity has long been associated with American culture and the excesses of fast-food consumption but the epidemic has now spread across other parts of the world to Europe and Asia Pacific, fuelling public concern and media attention.

Media coverage on obesity is on the increase in all countries. Global media interest is now four times bigger than it was five years ago. The UK overtook North America as obesity took on a political dimension. Last year, UK publications included in our panel* published more than 4,000 articles (175 items per publication or one item on obesity every two days).

In other regions such as Asia Pacific, the media have followed the same trend. Obesity is high on the media agenda, with health professionals, educators, food manufacturers and politicians feeding the debate.

"The estimated cost of obesity and being overweight in the United States is \$93 billion a year, which represents almost 10% of our nation's health care expenditures" US

() The scope includes leading daily and business press titles from France, the UK, the US and Asia Pacific*



Children: The centre of concern

Obesity among children is growing rapidly. There are real concerns among educators, health professionals and governments in all regions about the emergence of an obese society.

In the US, the Centres for Disease Controls and Prevention have declared obesity a national epidemic, especially among young children.

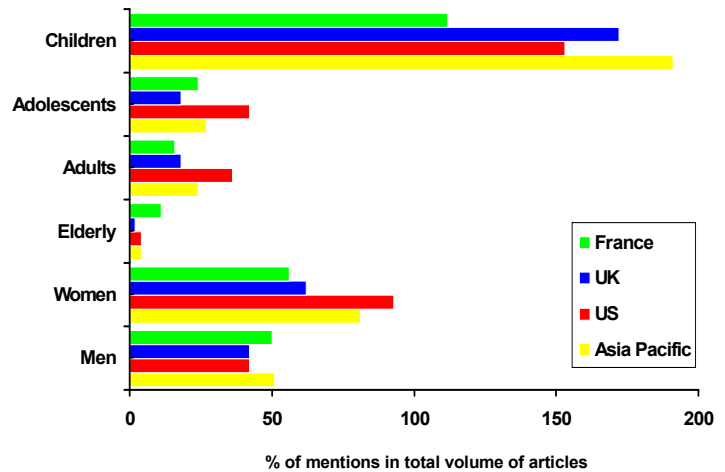
Medical research in the US also shows that overweight children have at least one medical condition as a result, and miss four times as much school as normal-weight children.

Besides the US, children in other regions have not escaped this modern-day scourge. In the UK, the Institute of Child Health found that children's average waist size increased by two inches in 10 years.

This also has serious implications for children's psychological development. Children who are teased at school about being overweight have significantly lower self-esteem than their peers.

"British rates of obesity have doubled since the 1980's and now afflict children too. Almost one in ten children under 11 is obese and many are expected to die before their parents" UK

"Obesity among children tripled in the last ten years"France



Women, too, are seen to be particularly prone. Research shows that highly educated obese women earn about 30 percent less than normal-weight women.

"Increasing rates of obesity suggest that young women's efforts to manage their weight are ineffective"Asia Pacific



Diet: The cause

Obesity is deeply embedded in our modern lifestyle, the media report. Food habits have changed: we eat badly, still don't do enough physical exercise, have a stressful life and try to sort all that out with cigarettes, alcohol and snacks.

"We should encourage real lifestyle change rather than constantly being told to go on a diet" UK

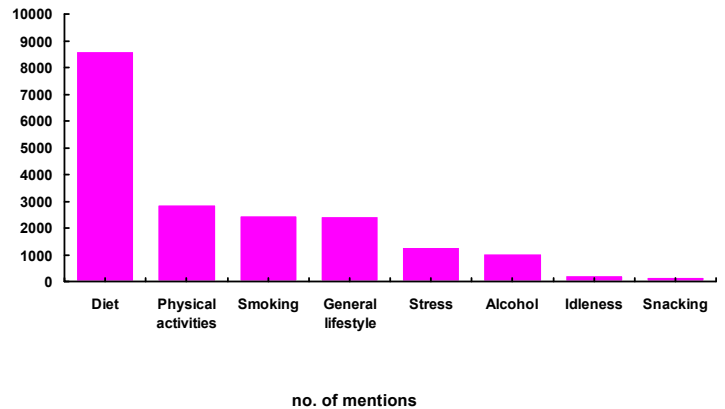
"The government estimates it will not be long before obesity kills more people every year than cigarettes" UK

"All those office pizzas and birthday cakes and the long hours in front of the computer, where eating out of boredom and stress has caused a great many folks to be out of shape" US

"The beer-drinking, cigarette-smoking, overweight tough guy is alive in the country but not so healthy" Asia Pacific

"Give them a healthy start in life and they will maintain a healthy lifestyle forever" UK

"Obesity is not just about fats and sugar, it also includes taking exercise!" France

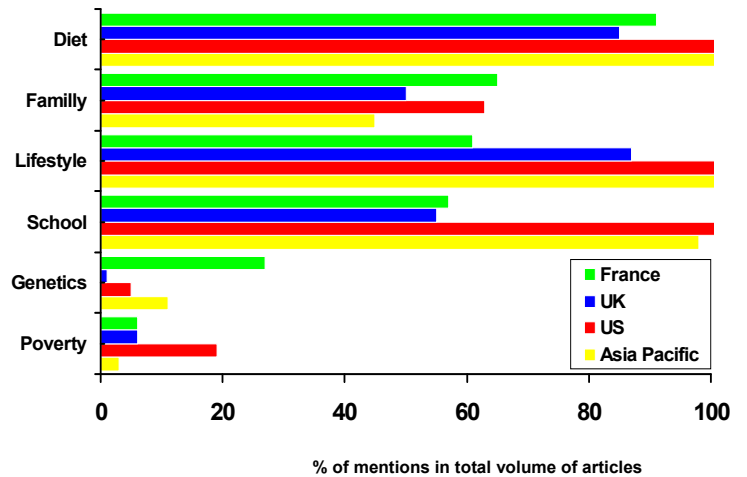


Social and cultural context: Key role for schools

Do we need to eat better? Undoubtedly, but obesity cannot be explained by a balanced diet alone. Drawing on experts' views, the media remind us that lifestyle as much as the role of parents influence the fight against obesity.

In particular, schools have an important part to play in that process. The US media focus most attention on this. The role of the educational system extends to not only limiting the contents and branding of vending machines, but in providing children with improved diets and proper food education.

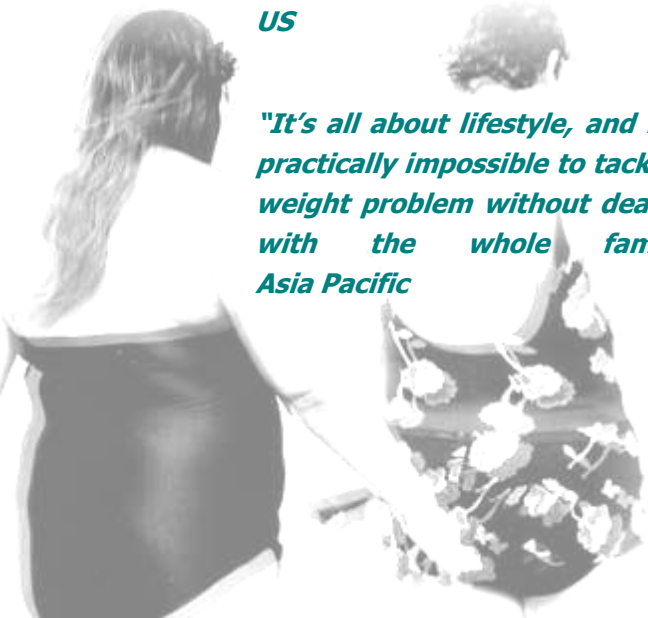
While diet, lifestyle and education are recognised universally as critical factors, **poverty**, too, is seen as a contributor, most starkly in the US.



"It may seem unfair to expect the school lunch program to be the vehicle of a dietary revolution, but there is no better place to start than the schools, where children spend more than 1,000 hours a year and where many of them also eat a federally subsidised breakfast"

US

"It's all about lifestyle, and it is practically impossible to tackle a weight problem without dealing with the whole family"
Asia Pacific



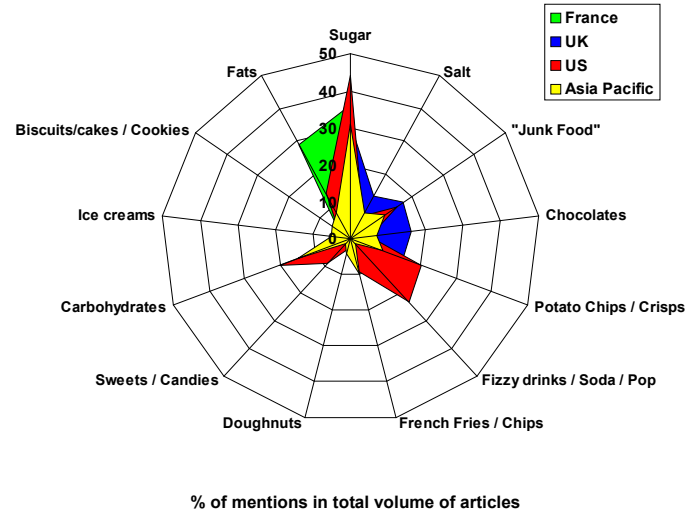
Obesity & Food: Sugar - Universal no-no

Each country seems to have its own “junk food” vices. France as the country that invented *gastronomie* now complains about *malbouffe*, with too much sugar and fats.

For the British, the weapons of mass obesity are chocolates, crisps and fizzy drinks.

In Asia Pacific, the fusion between carbohydrates and sugar is seen as a recipe for weight gain.

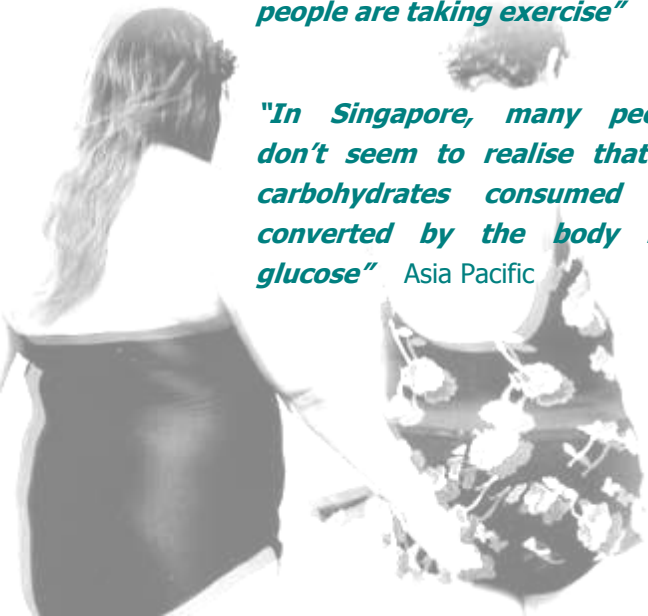
Fast food diets such as French fries, potato crisps and fizzy drinks are targeted by US experts as the causes of weight disorder.



"Trans-fats are in thousands of products from snack crackers to processed peanut butter, baked goods, some brands of baby biscuits and breakfast cereals, frozen waffles, pancake mixes, chocolate bars, candy and more" US

"Many families are living on a diet of burgers and chips, children are being stuffed with crisps and fizzy drinks, and less people are taking exercise" UK

"In Singapore, many people don't seem to realise that all carbohydrates consumed are converted by the body into glucose" Asia Pacific



Related medical implications: Obesity, diabetes and cancer threaten lives globally

Diabetes is the illness most linked to obesity in the public eye. Researchers have long identified linkages between the two disorders. Perhaps surprisingly, cancer also attracts substantial related media attention. While some experts question direct links, clinical research has indicated that the adoption of a more high-fat diet makes colorectal cancer much more pervasive.

Alongside cancer generally, obesity is the lifestyle epidemic that gets most media attention.

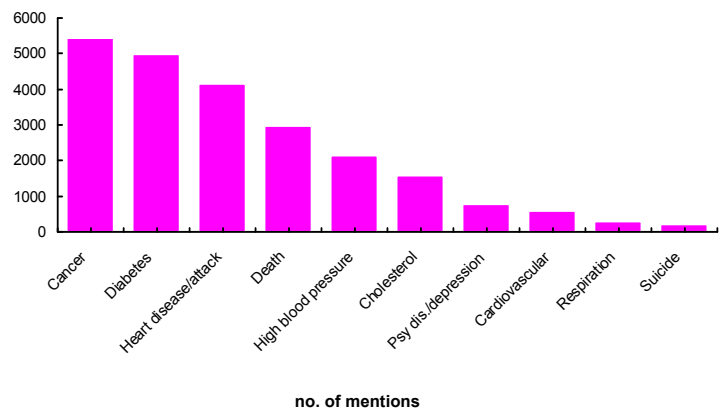
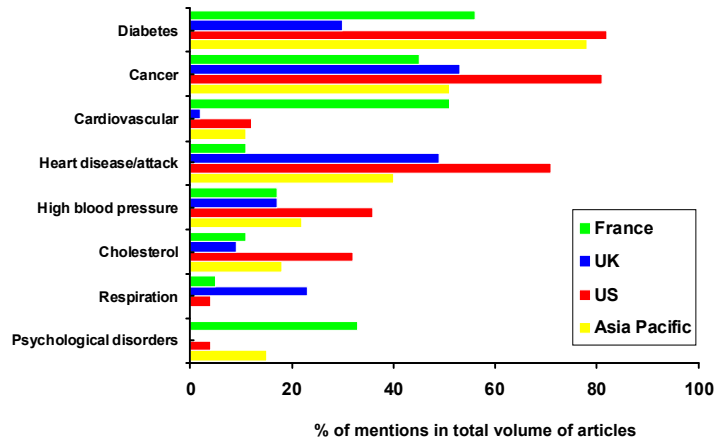
Heart disease, high blood pressure and cholesterol together with psychological troubles are the other related disorders that experts associate with obesity.

"Americans not only have an obesity problem, they are in the midst of a diabetes epidemic"
US

"Obese children also suffer more from psychological problems such as depression and anxiety"
UK

"40% of cancers due to unbalanced diet could be avoided" France

"Obese people are at least fifty per cent more likely to die of cancer than those who are not overweight, a study of 1 million Americans has shown" Asia Pacific



Leading influencers: Part of the problem and the solution

The debate on obesity involves a wide range of commentators and influencers beyond the traditional 'club' of health experts, educators, food manufacturers and others.

Not least, obesity is firmly on the political agenda and involves various other stakeholders such as pharmaceutical groups, insurance companies, retailers and law firms who have all found a voice in the crisis.

Health professionals were the first to raise the alarm about obesity and its implications for other medical disorders. They still are at the forefront of the fight against obesity, particularly in France, where they lead the debate.

Overall, **schools and educators** come closely behind, nowhere more prominently so than in the US where the focus is primarily on prevention.

Of note, **politicians and governments** drive the obesity issue in the UK and in Asia Pacific.

"Labour MP Debra Shipley introduced legislation to ban advertising of food and drink with high levels of fat, sugar and salt during pre-teens children's TV programmes" UK

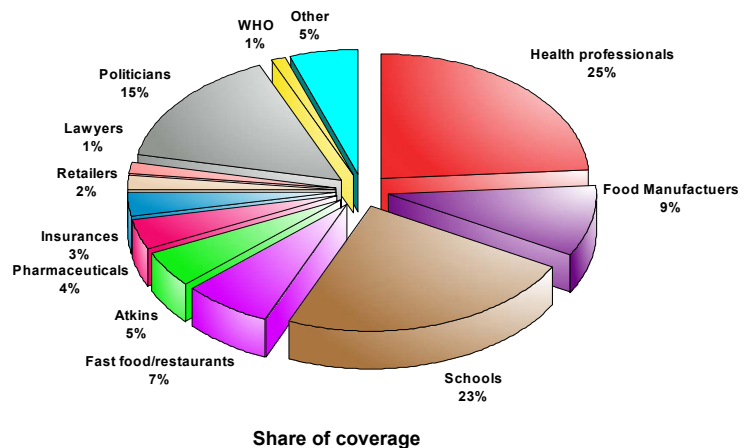
The media in all regions have pointed the finger at fast food restaurants and food manufacturers, tempered more recently with reporting of their new initiatives for healthier lifestyles and diets.

"McDonald's recently announced a healthy lifestyle program, including creation of an advisory council of outside experts that will guide the company on promotion of balanced healthy lifestyles" US

Pharmaceutical firms have already been very active in developing new medicines. The number of drugs in clinical development to treat obesity has increased by 400% since 2000.

Despite relatively low coverage in the national media, the **World Health Organisation** has been seen to take a stand:

"The World Health Organization is pursuing grander and more aggressive goals than any imagined by American planners. Convinced that nagging individuals to eat less and move more won't work, it aims: To stop the worldwide trend toward cheap mass-produced processed foods, to encourage the food industry to voluntarily alter advertising, pricing, labelling and marketing of junk food on a global scale, and to get people moving any way possible" US



Corporate responsibility: Share of coverage

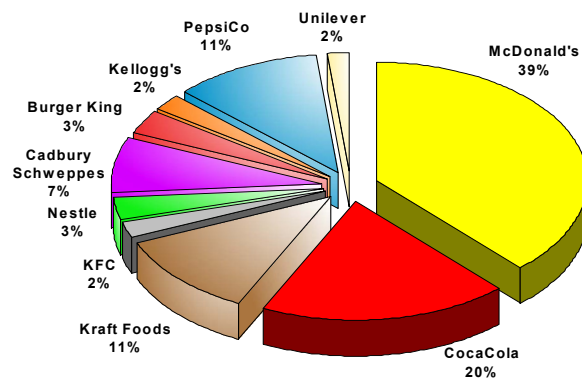
Among the top 10 companies most often mentioned in the obesity coverage, McDonald's is at the top of the league (39% of leading company mentions) well ahead of Coca-Cola (20%) and Kraft Foods (11%). Four of the five top companies quoted are US-based. Cadbury Schweppes, Nestlé and Unilever are the only European brands to find a place in the league.

McDonald's comes first in each region (USA, UK, France and Asia Pacific). The top three companies in each region are US-based, except in the UK where Cadbury Schweppes comes second behind the restaurant chain.

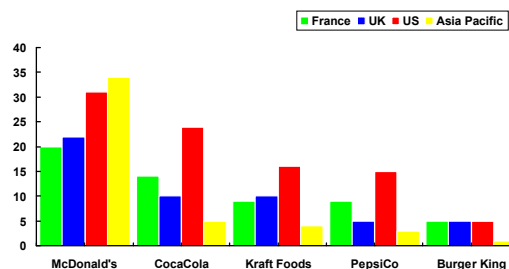
The high level of visibility of these brands in the media shows not only how closely they are associated with weight gain and obesity, but also reflects the various initiatives they are taking to help tackle the problem.

"McDonald's move to offer fruits and vegetables is encouraging but WHO is urging the company to reduce levels of saturated fat, sodium and sugar in its products" US

"The nation's big food companies are experiencing an identity crisis. They know they must come out with new products to please consumer concerned with health and fitness but in the slow-growth world of packaged food, they can't afford to abandon the old fashioned cry of 'Eat up!'"US



Share of coverage



% of mentions in total volume of articles



What actions to take: Regulation in the UK, Litigation in the US and Education in Asia Pacific

Education, litigation, regulation, and yes, being more responsible, are the main messages to the public. Behind these expressions, the approaches vary, according to region and the leading advocates.

"A lawsuit in New York blamed McDonald's burgers for making children fat. McDonald's was cleared in that case, but companies are worried about others" US

"More litigation is likely. However, it will need careful planning and a commitment to sound public-health results that lead to an end to America's obesity plague" US

In the US and Asia Pacific, media reports that prevention linked to education either at school or at home are the priority.

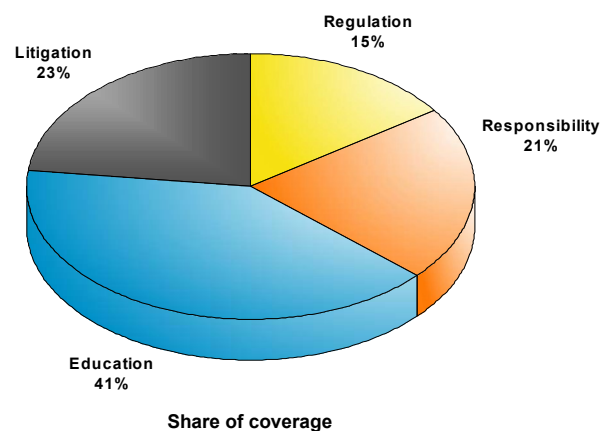
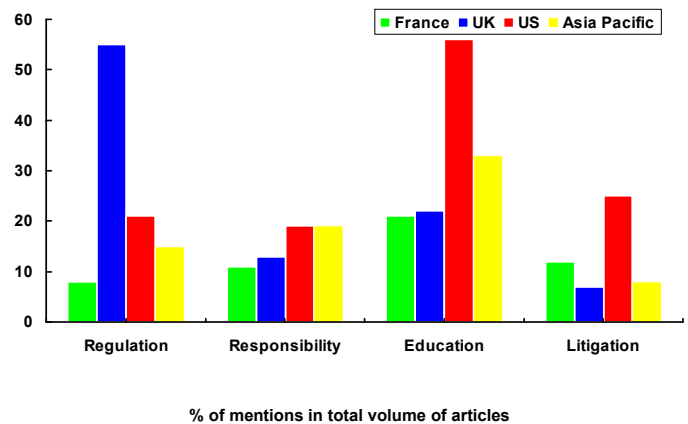
Whatever the methods used to fight the disorder, most seem to recognise that responsibility of individuals - in particular parents, government and corporations are all necessary to fight obesity.

"To fight obesity we need to review education" France

In the UK, where the debate is led by politicians, the media focus on regulation of advertising, programme publicity, labels and vending machines.

"The Food Standards Agency claimed that television ads promoting unhealthy food and drinks influence children's eating habits" UK

In the US, with its long tradition for class-action, litigation against food manufacturers and restaurants is widely debated. Some experts and lawyers considered it as an essential tool to curb the obesity trend.



Regulatory issues

Bans, Taxes and Labels

Changes in diet and a healthier lifestyle are considered as the key weapons of the war on obesity but health professionals, educators and politicians tend to believe that responsibility and prevention are only one part of the equation to resolve the issue. Experts blame TV and their flow of advertising for food products.

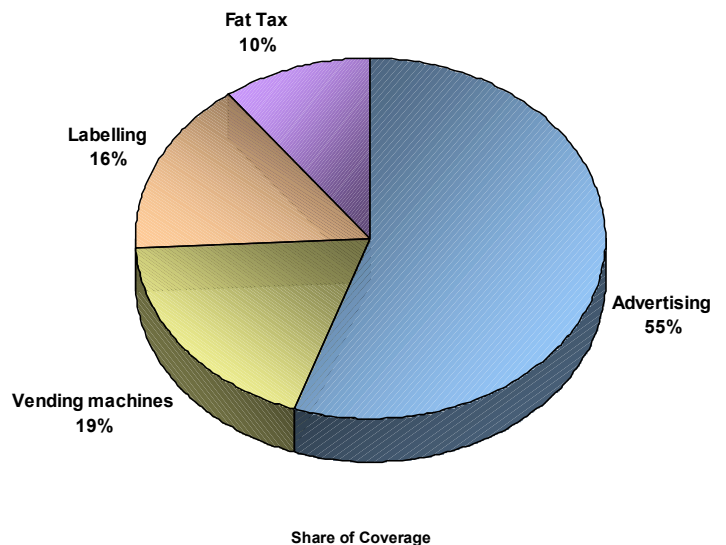
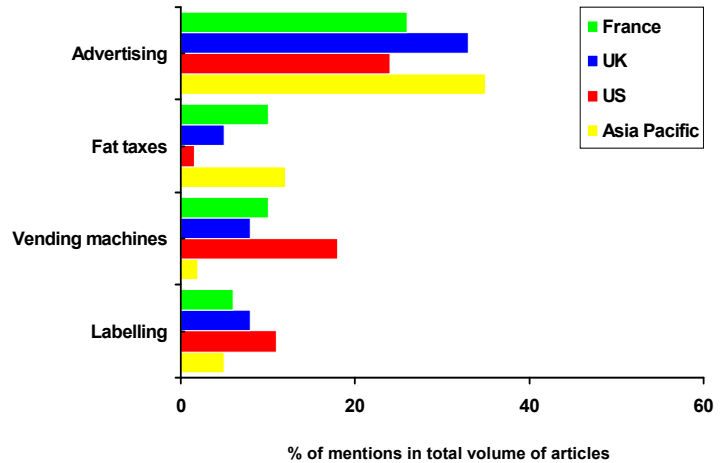
It is politicised environments of the UK and Asia Pacific that **bans** on food advertising are mostly called for:

"A childhood obesity summit in New South Wales had concluded that advertising contributes to childhood obesity" Asia Pacific

Once suggested as an option by the British government, the introduction of **"fat taxes"** is now more seen as a solution in France and in Asia Pacific.

Reviewing label practices and regulate vending machines - in school in particular - are considered practical solutions in most countries. Amid many proposed changes in the pipeline, The European Union is introducing new legislation that will regulate the use of "low fat" on labels.

"Schools should ban vending machines dispensing sugary drinks, salty snacks and sweets" UK



About Echo

Echo Research is a global specialist in reputation analysis and communications research, enabling organisations to measure how they are seen among different stakeholder groups.

With 165 analysts, Echo has offices in London, Brussels, Paris, Stockholm and New York, and partners in Amsterdam, Boston, and Melbourne. Its world-class clients include a quarter of the FTSE and Fortune 100. The Echo Group brings together market research, media analysis and communication planning to help clients monitor their reputation, brands, messages and image.

A full member of the UN Global Compact, Echo works across a number of sectors, with particular expertise in Consumer, Financial & Professional Services, Healthcare, IT, Telecommunications, Media, Utilities, Industry, Government and NGOs.

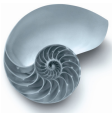
- **Communications Audits** to measure the effect of internal and external communications methods, tools and techniques.
- **Reputation Analysis** to identify and track what your main stakeholders believe and expect of you, so as to bridge any gaps.
- **Internet Evaluation** to measure sentiment towards your organisation in newsgroups and on the websites of competitors, critics and other third parties.
- **Issue Management Intelligence (*Echo Sonar*)** to pinpoint 'faint signals of change' on the horizon, whether opportunities or risks.
- **Journalist Audits** to enable you to communicate better with journalists and loop the findings back into media analysis.
- **Newshook Research** to identify information about people's attitudes as the basis for media coverage.

- **CSR surveys (*Echo Voyager*)** to design CSR programmes and measure their impact for Triple Bottom Line reporting.
- **Evaluation of Websites** to measure their user-friendliness and fitness for purpose, in the view of your target audiences.
- **Monitor of Competitor Communications** to draw out key points of targeting, appeal and brand messaging in the advertising / PR / communications of organisations comparable with your own.
- **Employee surveys** to find out how corporate messages are understood and 'lived' by staff, an organisation's most important ambassadors.
- **Crisis Impact Research** to track day-by-day the effect of a crisis on media, public and specialist opinion.
- **Media Analysis** to assess messages and reputation drivers, with favourability ratings and opportunities-to-see for sources, publications and journalists, plus actionable recommendations.
- **Scorecards and Key Performance Indicators (KPIs)** to support communications measurement and deliver a 'joined-up' overview of communications.
- **Public Affairs Reports** to provide favourability analyses of political debate in Hansard, proceedings of Select Committee hearings and other legislative forums.
- **Training and workshops** to help in-house teams interpret research and act on the implications.
- **Fastpoll** makes highly effective polling research affordable. Provides rapid turnaround (polling to reporting in 48 hours) using SMS, on-line and email research. UK & International panels.



Acknowledgement

We would like to extend thanks to Factiva for their support in providing media coverage for the Echo Research analysis in this report. Factiva, a Dow Jones & Reuters Company, provides world-class global content, including Dow Jones and Reuters newswires and The Wall Street Journal - unduplicated in a single service elsewhere. Factiva offers the only single content solution with multiple language interfaces and multilingual content covering nearly 8,000 sources.



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- Electrabel
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- English Heritage
- Enterprise Oil
- Equant
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- ExxonMobil

- Financial Times
- Fish 4
- Freshfields Bruckhams Deringer
- Fujitsu Siemens Computers

- Gateway 2000
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- GE Plastics
- Glaxo Wellcome
- Groupama
- gsk

- Halfords
- Heineken
- Hewlett-Packard
- Hill & Knowlton
- Hoffman-LaRoche
- Homebase
- Hyder

- IBM
- ICO Global Communications
- ICI Polyurethanes
- Infonet
- Intel
- International Factors
- Investcorp
- Invesco Perpetual
- Iomega

- JP Morgan Chase

- Kellogg's
- Kingfisher
- KPMG
- KP Nuts

- Lego
- Lehman Brothers
- Littlewoods
- Lloyds Bank Insurance Services
- LM UK
- London Electricity
- London Underground
- L'Oréal
- Lucent Technologies

- Madge Networks
- Manchester Airport
- Mastercard
- Manpower
- MCA
- McDonald's
- Mars
- MCI Worldcom
- Merck Sharpe & Dohme
- Mercury Communications
- Microsoft

- Nasdaq
- National Grid Transco
- NatWest Markets
- Nestlé
- Nintendo
- Nokia
- Norwich Union
- Novartis
- Novo Nordisk

- Old Mutual
- Orange
- Openwave
- Opodo.com
- Oracle
- Orient-Express

- Parke Davis
- PCCW
- Pfizer
- Philips Semiconductors
- Philip Morris
- PowerGen
- PricewaterhouseCoopers
- P&O Stena Line
- Procter & Gamble
- PPP
- Prudential
- PR Week
- PR Week USA

- Qinetiq

- Reuters
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- RMC
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- Sandoz
- SAS Institute
- Schroders
- Severn Trent Water
- Sharelink
- Shaws Supermarkets
- Shell International
- Siemens
- Smiths Industries
- Société Générale
- Sony Ericsson
- SAB Miller
- Sprint Corporation
- Standard Life Investments
- SWIFT
- Swiss Re

- Taylor Woodrow
- Thames Water
- TXU Energy

- UDV
- Unilever
- Unisys
- University of Warwick
- UPS
- Vanish
- Variety Perkins
- Virgin NET
- Volvo

- Wessex Water
- Western Union
- Whitbread

- Yorkshire Electricity

- Zeneca Agrochemicals
- Zurich Financial Services

- Disability Rights Commission
- Environment Agency
- European Commission
- Equal Opportunities Commission
- Financial Services Authority
- Health Education Authority
- Health Education Board for Scotland
- Home Office
- Industrial Development Board for Northern Ireland
- Inland Revenue
- London Fire Brigade
- Ministry of Defence
- National Audit Office
- New Opportunities Fund
- Qualifications and Curriculum Authority
- Retained Organs Commission
- Sri Lankan Government
- Surrey Police
- UKAEA
- UK Online
- Welsh Development Agency

NATIONAL & TRADE ASSOCIATIONS

- American Chemistry Council
- American Plastics Council
- British Paper Industry Federation
- BioIndustry Association
- British Nuclear Industry Forum
- CEATS
- CEFIC
- Confederation of European Paper Industries
- Eurochlor
- International Wool Secretariat
- Law Society
- Lawn Tennis Association
- Offshore Decommissioning Communications Project
- Pharmaceutical Partners
- PPIC
- PRCA
- Trades Union Congress

CHARITIES

- British Heart Foundation
- British Red Cross
- ChildLine
- Comité national français de liaison pour la réadaptation des handicapés
- Imperial Cancer Research Fund
- UNAIDS
- UN FAO
- UNICEF
- World Vision
- WWF

GOVERNMENT DEPARTMENTS & AGENCIES

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- Benefit Fraud Inspectorate
- Central Office of Information
- Corporation of London
- Dept for Education and Employment
- Dept of Environment, Transport and the Regions
- Dept of Trade & Industry



The HEAL (Healthy Eating, Active Living) Global Partnership aims to mobilise business as a responsible partner for health and wellness in the marketplace, workplace and community. An initiative of the International Business Leaders Forum (IBLF), HEAL is a unique multi-sector international initiative that profiles good corporate health and wellness practices, and facilitates active engagement in partnership initiatives designed to help to tackle the growing epidemic of obesity related illnesses at national and international levels.

www.healpartnership.org



The International Business Leaders Forum (IBLF) is an international, non-profit organization supported by over 100 leading CEOs and companies from Europe, America, Middle East and Asia. It promotes leadership in responsible business practices and innovation in partnerships for social and economic development. It has been a partner of WHO in preventative health initiatives and partnerships since 1997. IBLF worked with UNAIDS in early partnership initiatives and frameworks for engagement, and with the Global Alliance for Improved Nutrition (GAIN) in partnership methodologies. Since 2001 IBLF has been engaged in business dialogue with WHO on non-communicable diseases linked to poor diet and lack of physical activity. IBLF is not a representative organisation and membership of IBLF or engagement in IBLF programmes does not imply endorsement of company products, practices and processes.

www.iblf.org



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