



Consumer Insights on Food & Health: Findings and Messaging Opportunities

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Presentation Overview

- About IFIC
- Hot Button Topics: 2009
- What's on Consumers' Minds
 - 2008 Food & Health Survey
 - 2007 Functional Foods/Foods for Health Survey
- Summary
- Questions & Answers



International Food Information Council (IFIC) Foundation

Mission:

To effectively communicate science-based information on health, nutrition, and food safety for the public good.

Primarily supported by the broad-based food, beverage and agricultural industries.

<http://www.ific.org>



Nutrition Hot Button Issues—2009

OBESITY

- Dietary Guidelines and Food Guidance
 - “Discretionary calories”
 - Nutrient density
- Food Safety
- Stretching “Food Dollars”
- Carbohydrates (“Added” sugars; fructose; high fructose corn syrup; whole grains; refined carbs and sugars; glycemic index/load)
- Sodium
- Good/Bad Fats -- Trans fat
- Food behaviors
- Processed foods
- Children (Marketing; Schools)
- Nutrient profiling
- Functional Foods/Foods For Health
- Personalized Nutrition/Nutrigenomics

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2006



2007



2008

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Methodology

Methodology	Web Survey
Population	Representative Sample of Americans Aged 18+
Data Collection Period	February 21-March 11, 2008
Sample Size (Error)	n=1,000 (± 3.1 For 2008) (± 4.4 Among 2008, 2007, 2006)
Data Weighting*	Data Weighted on Age, Income, Education and Race

*Weighting is a widely accepted statistical technique that is used to ensure that the distribution of the sample reflects that of the population on key demographics. With any data collection method, even when the outgoing sample is balanced to the Census, some populations are more likely than others to respond.

† Significant increase from year indicated
 ‡ Significant decrease from year indicated

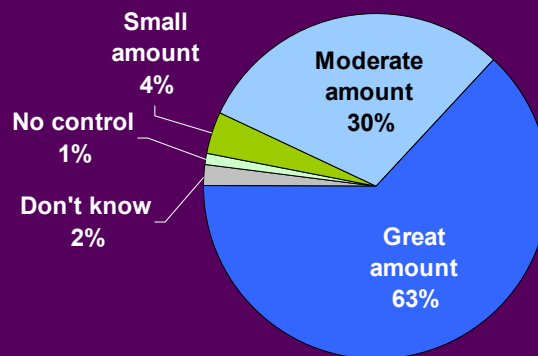





General Attitudes Toward Food and Health



The Majority of Consumers Believe They Have Control Over Their Health

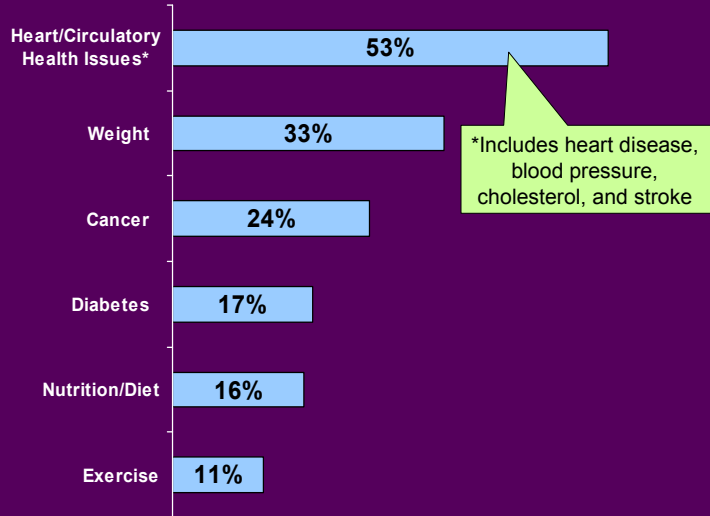


How much control would you say you have over your own health?
(n=1000)

IFIC Consumer Attitudes Toward Functional Foods 2007



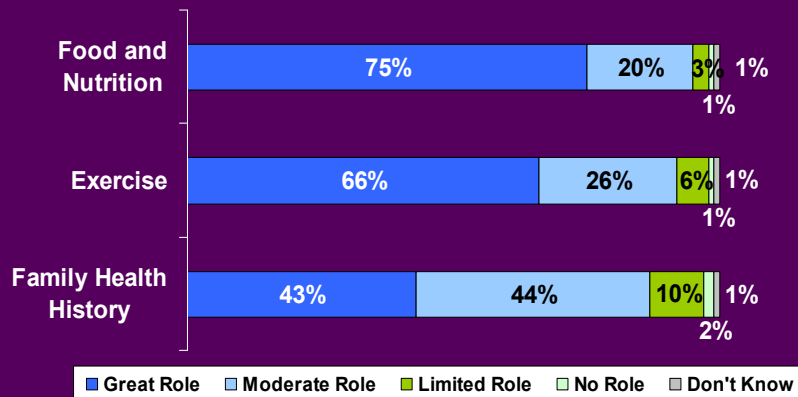
Americans' Top Health Concerns



What are your top three health concerns, listed in order of importance to you? (Unaided, Multiple Responses) (n=1000)

IFIC Consumer Attitudes Toward Functional Foods 2007

Consumers Feel that Nutrition Plays the Greatest Role in Health



To what extent does each factor play a role in maintaining or improving overall health? (n=1000)

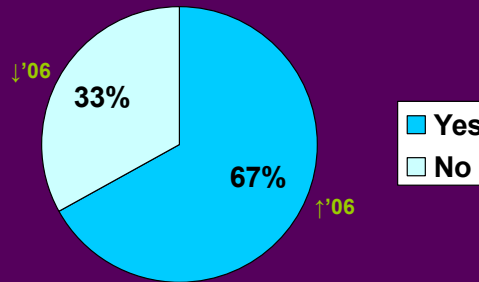
IFIC Consumer Attitudes Toward Functional Foods 2007



Diet, Calories, and Physical Activity



The majority of Americans have made changes to improve the healthfulness of their diet in the past six months



Over the past six months, have you made any changes in an effort to improve the healthfulness of your diet?
2008 (n=1000)

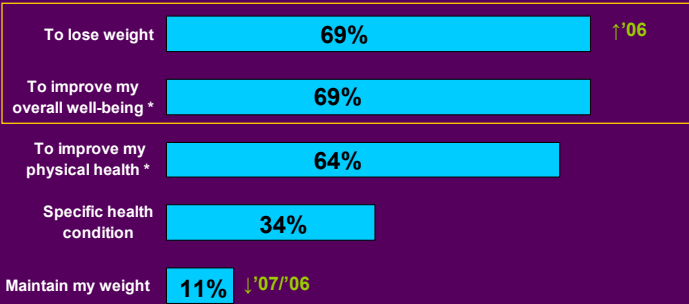


↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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Losing weight and improving health are top drivers of dietary change.

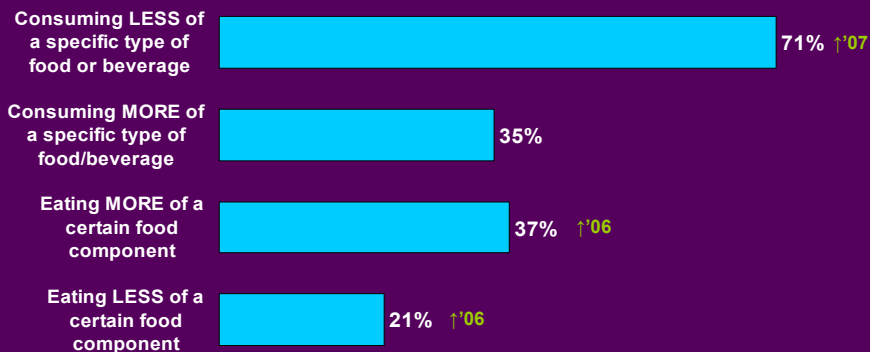


For which of the following reasons, if any, are you trying to improve the healthfulness of your diet?
2008 (n=669)

↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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Consumers are increasing and decreasing consumption of certain items to improve their diet's healthfulness.



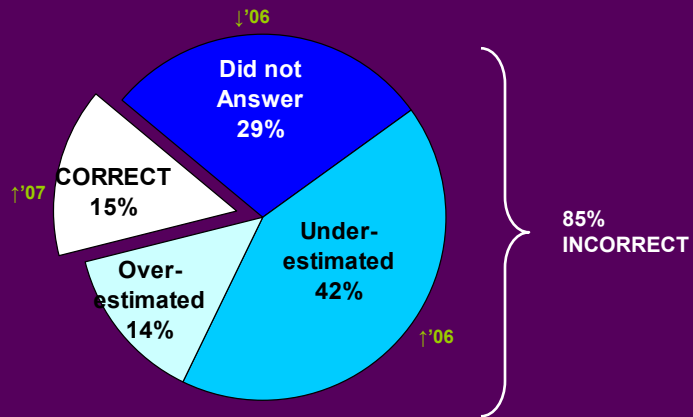
Which of the following changes, if any, have you made in the past six months to improve the healthfulness of your diet?
2008 (n=669)

↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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Majority Inaccurately Estimate Daily Calorie Needs

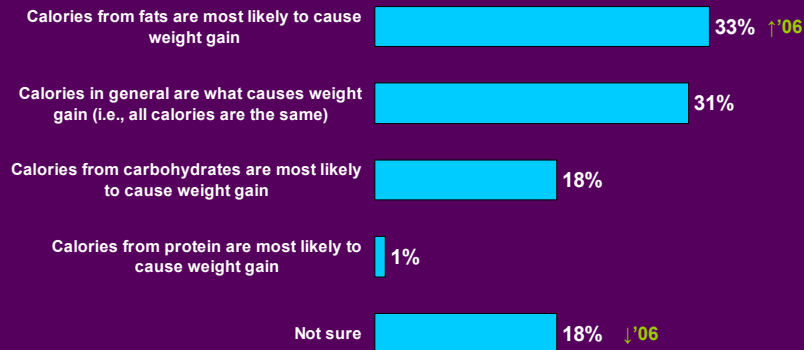


As far as you know, how many calories should a person of your age, weight, height, and physical activity consume per day?
2008 (n=1000)

↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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Americans are still confused about calories

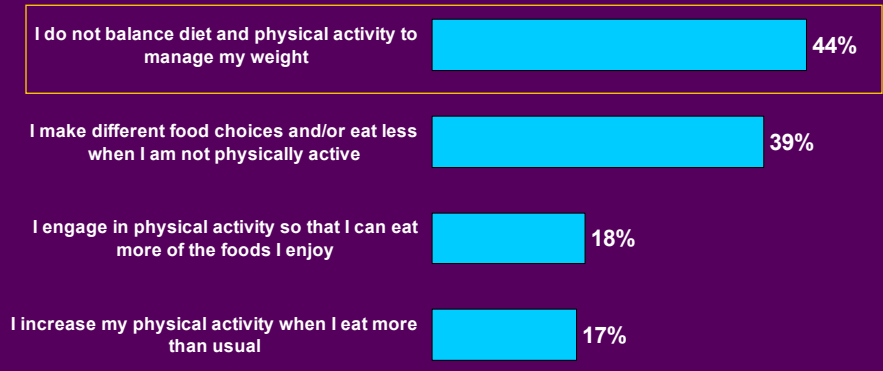


Which of the following statements do you agree with regarding the relationship between calories and weight gain?
2008 (n=1000)

↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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Not Balancing Diet and Physical Activity to Manage Weight



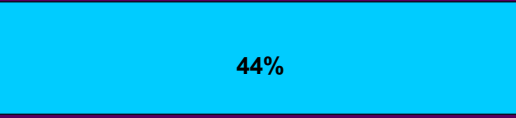
*[If active] Which of the following statements best describes your current approach to diet and physical activity for weight maintenance?
2008 (n=877)*

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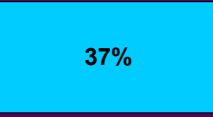


Many consumers are unaware of the benefits of low-calorie sweeteners for weight management.

Low-calorie/artificial sweeteners can play a role in weight loss or weight management



Low-calorie/artificial sweeteners can reduce the calorie content of foods



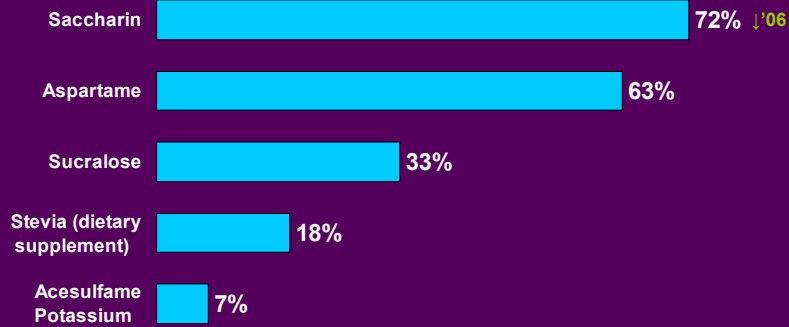
■ Percent Agree

*Which of the following statements, if any, do you agree with regarding low-calorie/artificial sweeteners?
2008 (n=1000)*

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Awareness of Low-calorie Sweeteners



2008 (n=1000)

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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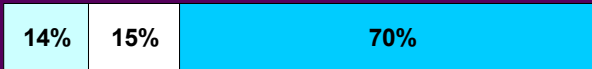
Dietary Fats and Carbohydrates in Foods



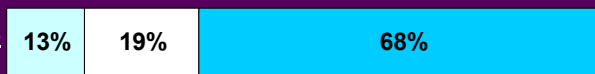


Concern with Amount and Type of Fats

Concern with amount of fat consumed



Concern with type of fat consumed



■ Not Concerned ■ Neither ■ Concerned

2008 (n=1000)

* Total does not add to 100 percent due to rounding

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Consumers Are More Aware of “Bad Fats” Than “Good Fats”

2008 (n=1000)
*Added in 2008

Percent heard of:		
Trans fat	91%	↑'07/'06
Saturated Fats	90%	
Unsaturated fats*	78%	
Animal Fats	76%	↓'06
Omega-3 Fatty Acids	72%	↑'06
Polyunsaturated Fats	71%	↓'06
Hydrogenated Oils	65%	
Monounsaturated Fats	63%	↓'06
Cocoa butter*	63%	
Partially Hydrogenated Oils	61%	
Omega-6 Fatty Acids	39%	↓'07
Naturally Occurring Trans Fats	26%	
Stearic Acid	18%	

↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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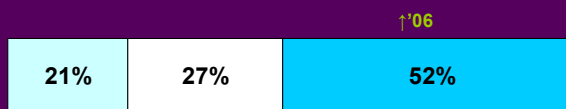


Concern with Amount and Type of Carbohydrates

Concern with amount of carbs consumed



Concern with type of carbs consumed



■ Not Concerned ■ Neither ■ Concerned

2008 (n=1000)

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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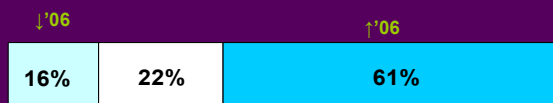


Concern with Amount and Type of Sugars

Concern with amount of sugars consumed



Concern with type of sugars consumed



■ Not Concerned ■ Neither ■ Concerned

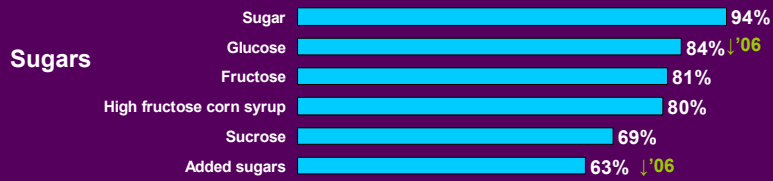
2008 (n=1000)

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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Awareness of Carbohydrates and Sugars

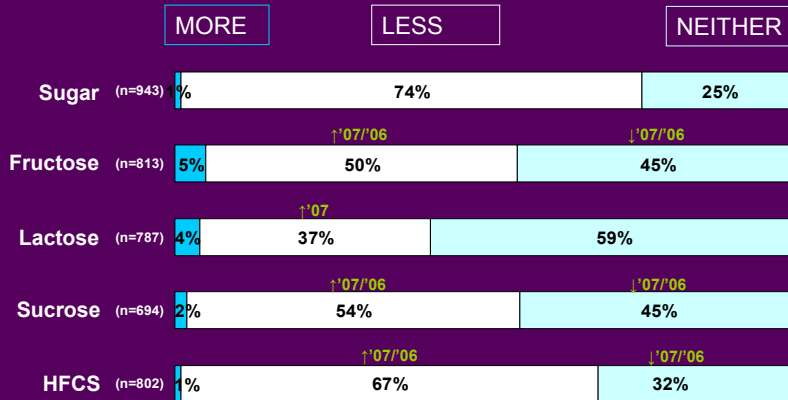


2008 (n=1000)

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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Americans Are Trying to Consume LESS Sugar



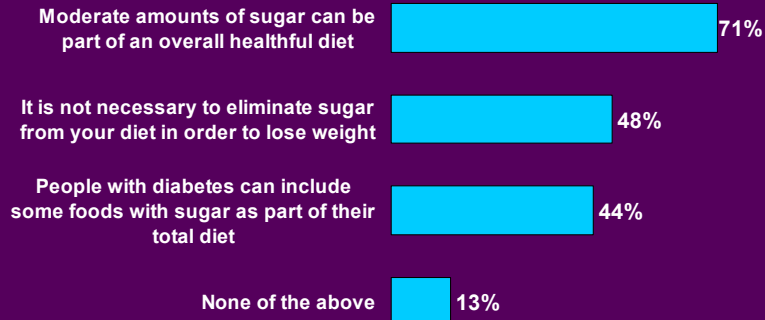
[IF AWARE] Please indicate whether you are trying to consume more or less of the following.

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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A Spoonful of Sugar: Consumers Believe in Moderation



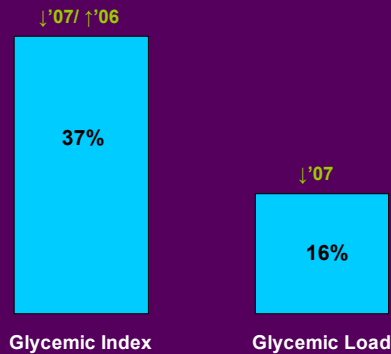
As far as you know, which of the following statements, if any, are true?
2008 (n=1000)

↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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Awareness of Glycemic Index and Glycemic Load



↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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Foods and Beverages with Health and Wellness Benefits



Majority Believe Foods & Beverages Provide Benefits, But Are Not Consuming

	Percent Somewhat/ Strongly Agree	Percent Currently Consuming
1. Improve heart health	78%	40%
2. Improve energy or stamina	77%	38%
3. Improve digestive health	76%	37%
4. Improve mental performance	71%	29% ^{↑07}
5. Improve immune system function	71%	31%

To what extent do you agree or disagree that some specific foods or beverages can provide the following benefits? 2008 (n=1000)

Please indicate your current or future interest in foods and beverages that provide each of the following benefits: 2008 (n=1000)

↑ Significant increase from year indicated
↓ Significant decrease from year indicated

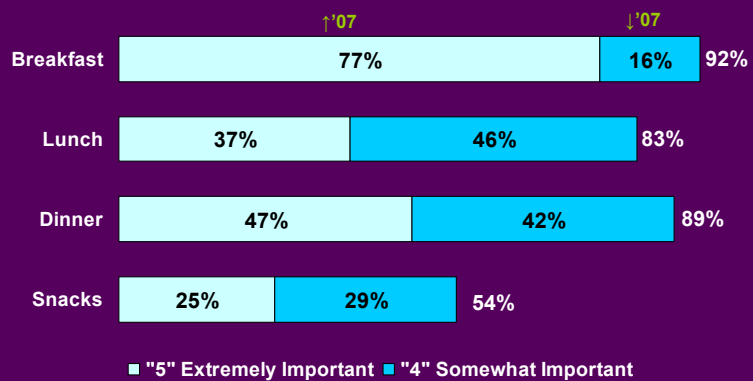
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Meal Occasions



Perceived importance of meal occasions



How important, if at all, are each of the following eating occasions to an overall healthful diet?
2008 (n=1000)

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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Frequency of consumption of meal occasions



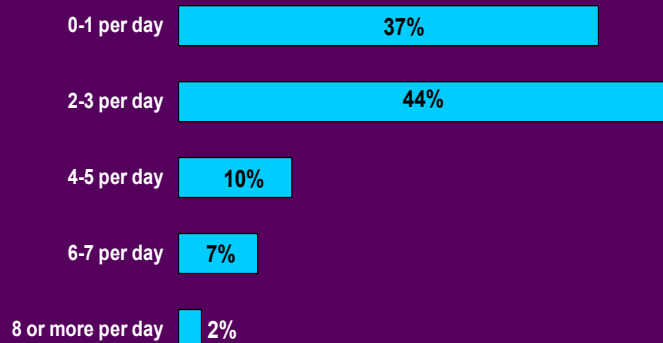
In general, how often do you eat each of the following (per week) . . .

↑ Significant increase from year indicated
↓ Significant decrease from year indicated

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Frequency of Snacks per Day



In general, how often do you eat snacks per day?
2007 (n=1000)

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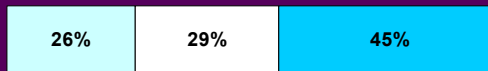
Food Safety



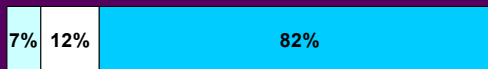
Consumers and Food Safety



To what extent, if at all, are you confident in the safety of the U.S. food supply?



To what extent, if at all, do you feel confident that you know how to safely prepare foods for yourself or your family?



■ Unconfident ■ Neither Confident Nor Unconfident ■ Confident

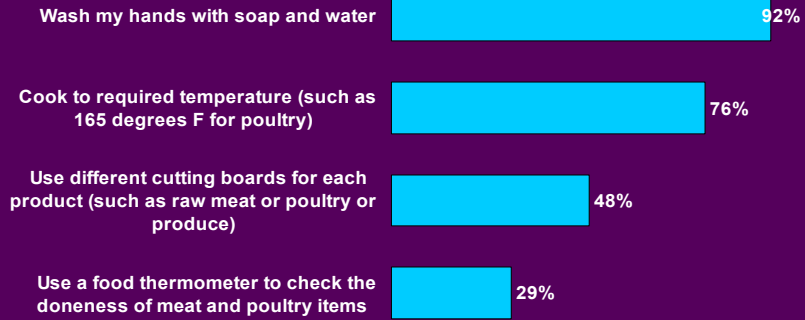


2008 (n=1000)

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Food Safety Practices Do Not Always Match Confidence



2008 (n=1000)

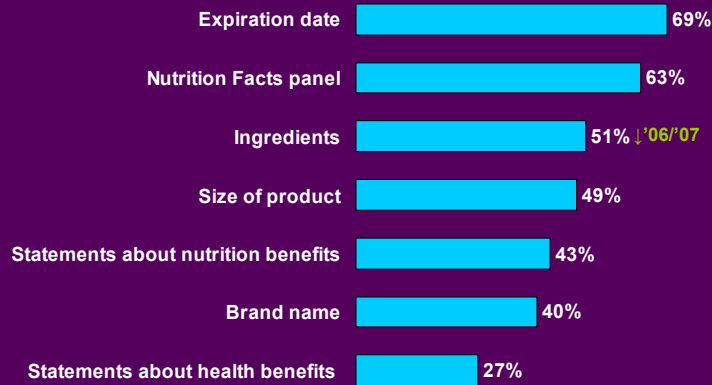
Which of the following actions do you perform regularly when cooking, preparing, and consuming food products?

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How Consumers Use Nutrition Tools



Top Information Used on Food or Beverage Packages



What information do you look for on the food or beverage package when deciding to purchase or eat a food or beverage? 2008 (n=1000)

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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Top Information Used on the Nutrition Facts Panel

Percent of consumers who use: (n=627)		
Calories	75%	
Total Fat	71%	
Sugars	68%	
Sodium	60%	
Saturated Fat	58%	
Trans Fat	59%	↑'06
Serving size	55%	↑'07/↓'06
No. of servings per package	55%	↑'07
Carbohydrates	47%	↓'06
Fiber	52%	↑'07/↑'06
Protein	40%	↑'07

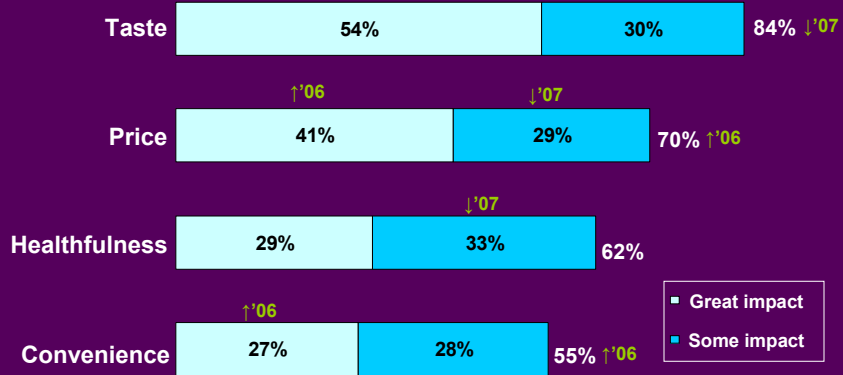
[If use] Which of the following information, if any, do you use on the Nutrition Facts Panel?

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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Taste Top Influencer in Purchasing Decisions



How much of an impact do the following have on your decision to buy foods and beverages? (n=1000)

↑ Significant increase from year indicated
 ↓ Significant decrease from year indicated

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"I'M PUTTING YOU ON A 'WHATEVER TASTES GOOD, DON'T EAT IT' DIET."



In Summary...

Interest is high... but help is needed.

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Stay Tuned for 2009!

- Continued Trending
PLUS
- New Data On...
 - Total diet and lifestyle
 - Behaviors: motivators and barriers
 - Communications: info sources, positive vs. negative messaging
 - Food safety



Nutrition Communications for Consumers Summary

- When Communicating with Consumers about Food, Nutrition and Health. . .
 - Meet consumers where they are—take our information to them
 - Understand their lifestyle
 - Speak their language with positive and motivational messages



Parting Thoughts

“You scream, I scream, we all scream for ice cream.”

-American Proverb

“Ice cream is like medicine; it’s not even food—it’s an antidepressant.”

*--Stephen Colbert, *The Colbert Report**



THANK YOU!

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For more information:

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