Consumer Health and Nutrition Insights

The International Citrus and Beverage Conference

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President and CEO, International Food Information Council

Wednesday, September 16, 2009
International Food Information Council (IFIC) and The Foundation

**Mission:**

To effectively communicate science-based information on food safety and nutrition issues to health professionals, journalists, educators, government officials, and consumers.

**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.

www.IFIC.org
IFIC and IFIC Foundation
Trended Research

IFIC Functional Foods/
Foods for Health
Consumer Trending Survey

International Food Information Council
2009 Food & Health Survey
Consumer Attitudes toward Food, Nutrition & Health

IFIC.org
## Methodology

<table>
<thead>
<tr>
<th>Methodology</th>
<th>Web Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>Sample Representative of U.S. Census; Americans Aged 18+ years</td>
</tr>
<tr>
<td>Data Collection Period</td>
<td>May 11-20, 2009</td>
</tr>
<tr>
<td>Sample Size (Error)</td>
<td>n=1,005 (± 3.0% for 2009 at 95% confidence level) (± 4.4% among years at 95% confidence level)</td>
</tr>
<tr>
<td>Data Weighting*</td>
<td>Data Weighted by Education</td>
</tr>
</tbody>
</table>

*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.*
General Attitudes toward Health and Nutrition
The Majority of Consumers Believe They Have Some Control Over Their Health

How much control would you say you have over your own health? (n=1005)

- Great amount: 66%
- Moderate amount: 25%
- Small amount: 6%
- No control: 1%
- Don’t know: 2%

▲ / ▼ Significant increase/decrease from 2007
Americans’ Top Health Concerns

Please list your top two or three health concerns, in order of importance to you. (unaided, multiple responses) (n=1005)

- **Cardiovascular disease**: 48% ▼
- **Weight**: 31%
- **Cancer**: 24%
- **Diabetes**: 17%
- **Nutrition/Diet**: 16%
- **Exercise**: 14%

Includes heart disease, blood pressure, cholesterol, and stroke

▲ / ▼ Significant increase/decrease from 2007

2009 IFIC Functional Foods/ Foods for Health Consumer Trending Survey
Consumers Overwhelmingly Believe that Food & Nutrition Play a Role in Improving Overall Health

To what extent does each factor play a role in maintaining or improving overall health? \((n=1005)\)

- **Food and Nutrition**: 72% Great Role, 23% Moderate Role, 3% Limited Role, 1% No Role, 3% Don’t Know
- **Exercise**: 62% Great Role, 31% Moderate Role, 4% Limited Role, 2% No Role, 2% Don’t Know
- **Family Health History**: 39% Great Role, 47% Moderate Role, 10% Limited Role, 2% No Role, 1% Don’t Know

▲ / ▼ Significant increase/decrease from 2007
The Majority of Americans Report Making a Change to Improve The Healthfulness of Their Diet

Over the past six months, have you made any changes in an effort to improve the healthfulness of your diet? (n=1064)

▲ / ▼ Significant increase/decrease from year indicated

▲ '06

No

36%

▼ '06

Yes ▲ '06

64%
(IF MADE DIETARY CHANGES OVER PAST SIX MONTHS) For which of the following reasons are you trying to improve the healthfulness of your diet? Select all that apply. (n=684)

- To improve overall well-being: 64%
- To improve physical health: 61%
- To lose weight: 61% '08/'07
- Because of a specific health condition: 30% ‘07/'06
- To maintain my weight: 17% '08

NOTE: “Other” response (one percent) not shown

▲ / ▼ Significant increase/decrease from year indicated
Consumers are Changing the Types and Amount of Food Consumed to Improve the Healthfulness of Diet

(IF MADE DIETARY CHANGES OVER PAST SIX MONTHS) Which of the following changes have you made in the past six months to improve the healthfulness of your diet? 

Select all that apply. (n=684)

- Changing the types of foods and/or food components I eat: 79%
- Changing the amount of food I eat: 69%
- Changing how often I eat: 44%
- Changing my use of dietary supplements: 19%
- Counting calories: 17%

NOTE: “Other” response (four percent) not shown
### Awareness: Carbs and Sugars

**Percent Heard of**

<table>
<thead>
<tr>
<th>Carbs</th>
<th>Percent Heard of</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole grains</td>
<td>83%</td>
</tr>
<tr>
<td>Fiber</td>
<td>87%</td>
</tr>
<tr>
<td>Complex carbohydrates</td>
<td>52%</td>
</tr>
<tr>
<td>Refined carbohydrates</td>
<td>33%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sugars</th>
<th>Percent Heard of</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sugar</td>
<td>90%</td>
</tr>
<tr>
<td>Fructose</td>
<td>80%</td>
</tr>
<tr>
<td>Glucose</td>
<td>78%</td>
</tr>
<tr>
<td>High fructose corn syrup</td>
<td>76%</td>
</tr>
<tr>
<td>Lactose</td>
<td>72%</td>
</tr>
<tr>
<td>Sucrose</td>
<td>64%</td>
</tr>
<tr>
<td>Added sugars</td>
<td>59%</td>
</tr>
</tbody>
</table>

**Question:** Which of the following have you heard of? (n=1064)

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*2009 Food & Health Survey*
(IF AWARE) Please indicate whether you are trying to consume more or less of the following.

*Total does not add to 100 percent due to rounding.
66 percent of consumers agree with the following statement:

“Moderate amounts of sugar can be part of an overall healthful diet.”
I am more interested in hearing about what TO eat, rather than what NOT to eat

Disagree | Neither | Agree
---|---|---
13% | 31% | 56%

(n=1064)
“Functional Foods”

WORKING DEFINITION

Foods That May Provide a Health Benefit Beyond Basic Nutrition
The Majority of Americans Agree that Certain Foods Have Health Benefits Beyond Basic Nutrition

Now a few questions about food. Each time we use the word “food,” we are referring to everything people eat, including fruits, vegetables, grains, meats, dairy, as well as beverages, herbs, spices and dietary supplements.

Do you disagree or agree that certain foods have health benefits beyond basic nutrition?  
(n=1005)

▲ / ▼ Significant increase/decrease from 2007
The Majority of Americans Can Name a Specific Food and Its Associated Benefit

92% can name a food and its associated benefit

(stable from 92% in 2007, 91% in 2005; up from 84% in 2002, 82% in 2000, and 77% in 1998)

What is the (first/second/third) food or food component that comes to mind that is thought to have health benefits beyond basic nutrition? (n=1005)

And, what type of health benefit (beyond basic nutrition) is that food component good for? (n=927)
Top “Functional Foods” Named by Consumers

Fruits and vegetables ▲
Fish/fish oil/seafood
Dairy (including milk and yogurt)
Meat and poultry
Herbs and spices
Fiber
Tea and green tea
Nuts ▲
Whole grains and other grains
Water
Cereal
Oats/oat bran/oatmeal ▼
Vitamins and supplements

What is the (first/second/third) food or food component that comes to mind that is thought to have health benefits beyond basic nutrition? (n=1005)

▲ / ▼ Significant increase/decrease from 2007
The Majority of Consumers, 68-85%, Agree that Foods and Beverages Can Provide Benefits

- Improve health, including heart (85%); bone (82%); eye (73%); circulatory (78%); and digestive health (81%)

- Contribute to a healthy body weight (81%) or provide you with a feeling of fullness for a longer period of time (73%)

- Maintain overall health and wellness (82%)

- Improve physical energy or stamina (82%); mental performance (72%); overall appearance (73%)

- Contribute to healthy growth and development in children (83%)

To what extent do you agree or disagree that some specific foods or beverages can provide the following benefits? (split sample)*
Of the 27 Food and Health-Benefit Pairings, 63% Had an Increase in Awareness

<table>
<thead>
<tr>
<th>Health-Benefit Pairing</th>
<th>Change in Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calcium and bone health</td>
<td>(93 percent vs. 89 percent in 2007)</td>
</tr>
<tr>
<td>Vitamin D for the promotion of bone health</td>
<td>(90 percent vs. 81 percent in 2007)</td>
</tr>
<tr>
<td>Whole grains for reduced risk of heart disease</td>
<td>(83 percent vs. 72 percent in 2007)</td>
</tr>
<tr>
<td>Antioxidants for protection against free radical damage</td>
<td>(81 percent vs. 72 percent in 2007)</td>
</tr>
</tbody>
</table>

For each of the following food components or nutrients, please tell us whether you are aware that that food component or nutrient is thought to provide each of the following health benefits. *(split sample)*
## Health-Benefit Pairings that Experienced the Largest Increase in Awareness Since 2007

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<thead>
<tr>
<th>Health-Benefit Pairing</th>
<th>Change in Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Omega-3 fatty acids for cognitive development especially in children</td>
<td>(72 percent vs. 53 percent in 2007)</td>
</tr>
<tr>
<td>B vitamins for reduced risk of heart disease</td>
<td>(78 percent vs. 61 percent in 2007)</td>
</tr>
<tr>
<td>Probiotics for maintaining a healthy immune system; and digestive health</td>
<td>(71 percent vs. 54 percent in 2007)</td>
</tr>
<tr>
<td>Folic acid for reduced risk of heart disease</td>
<td>(70 percent vs. 55 percent in 2007)</td>
</tr>
<tr>
<td>Plant sterols for reduced risk of heart disease</td>
<td>(45 percent vs. 30 percent in 2007)</td>
</tr>
</tbody>
</table>

For each of the following food components or nutrients, please tell us whether you are aware that that food component or nutrient is thought to provide each of the following health benefits. **(split sample)**
Consumption of Certain Food Component/Health Benefit Pairs

- Roughly 25-60% of all consumers are consuming specific food components/nutrients for benefits.

- Americans are most likely already taking advantage of are those related to bone and digestive health, cardiovascular disease, optimal health/protection against chronic disease, and cancer.

- Approximately, 35-50% of all consumers are likely to begin eating specific food components/nutrients for benefits.
### Top Potentially Beneficial Components Sought for Adults and Children

**Percent Ranked 1<sup>st</sup>-3<sup>rd</sup>**

<table>
<thead>
<tr>
<th>Adults</th>
<th>Children</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiber</td>
<td>(37 percent)</td>
</tr>
<tr>
<td>Whole grains</td>
<td>(34 percent)</td>
</tr>
<tr>
<td>Protein</td>
<td>(28 percent)</td>
</tr>
<tr>
<td>Calcium</td>
<td>(26 percent)</td>
</tr>
<tr>
<td>Antioxidants</td>
<td>(19 percent)</td>
</tr>
<tr>
<td>Vitamin C</td>
<td>(18 percent)</td>
</tr>
<tr>
<td>Omega-3s/DHA</td>
<td>(10 percent)</td>
</tr>
</tbody>
</table>

When choosing food or beverages for yourself, which of the following potentially beneficial components, if any, are you looking for? Rank top three. (n=1064)

(IF HAVE CHILD/CHILDREN) When choosing food or beverages for your child/children, which of the following potentially beneficial components, if any, are you looking for? Rank top three. (n=325)

**NOTE:** Responses less than five percent not shown

2009 Food & Health Survey
How much of an impact do the following have on your decision to buy foods and beverages? (n=1064)

- Taste: 87% Some Impact, 53% Great Impact
- Price: 74% Some Impact (↑’06), 43% Great Impact (↑’07/’06)
- Healthfulness: 61% Some Impact, 26% Great Impact
- Convenience: 52% Some Impact (↓’07), 26% Great Impact (↑’06)

▲ / ▼ Significant increase/decrease from year indicated
What three sources of information do you use most often to guide your food, nutrition, and food safety practices? Select three. (n=1064)

NOTE: Responses less than five percent not shown
In general, how interested are you in learning more about foods that have health benefits beyond basic nutrition?  \( n=1005 \)

*Individual percentages do not add up to 85 percent due to rounding*
In Summary

- Consumer awareness of diet and health relationships is at an all-time high.
- The majority of consumers are interested in learning more about foods and beverages with added benefits.
- Many consumers are eating these foods and food components, still more are interested in including them in their diet.
- Future challenge: Motivating consumers to act and sustain beneficial lifestyle changes.
Thank You!

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