



How Food Decisions are Made: Consumer Views on Whole grains and Fiber

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International Food Information Council Foundation

Just Ask for Whole Grains

Conference November 5-7, 2007 Kansas City



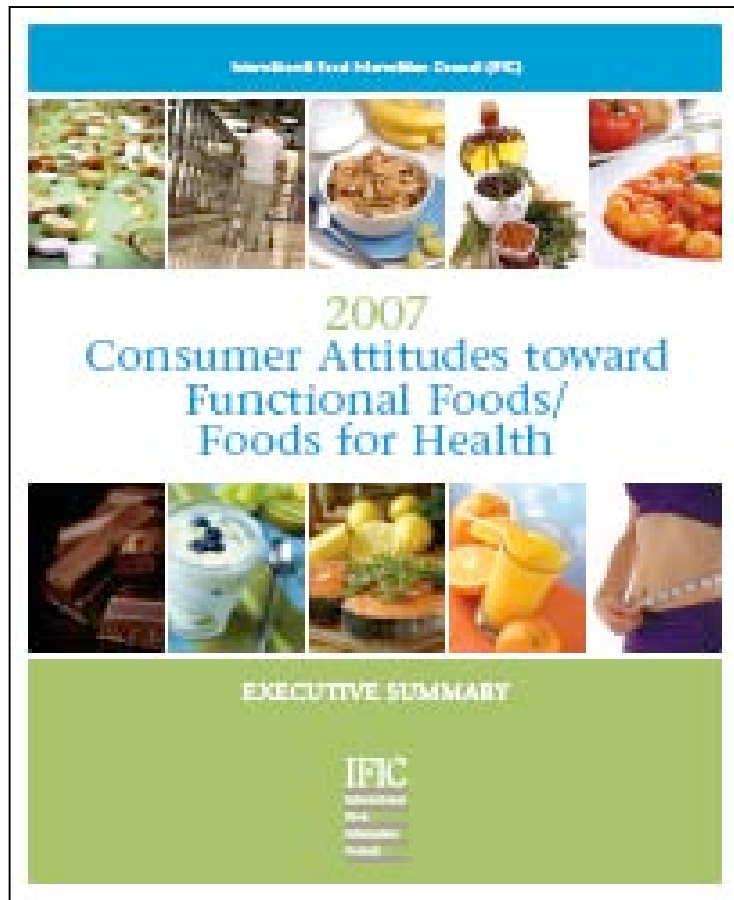
International Food Information Council (IFIC)

Mission:

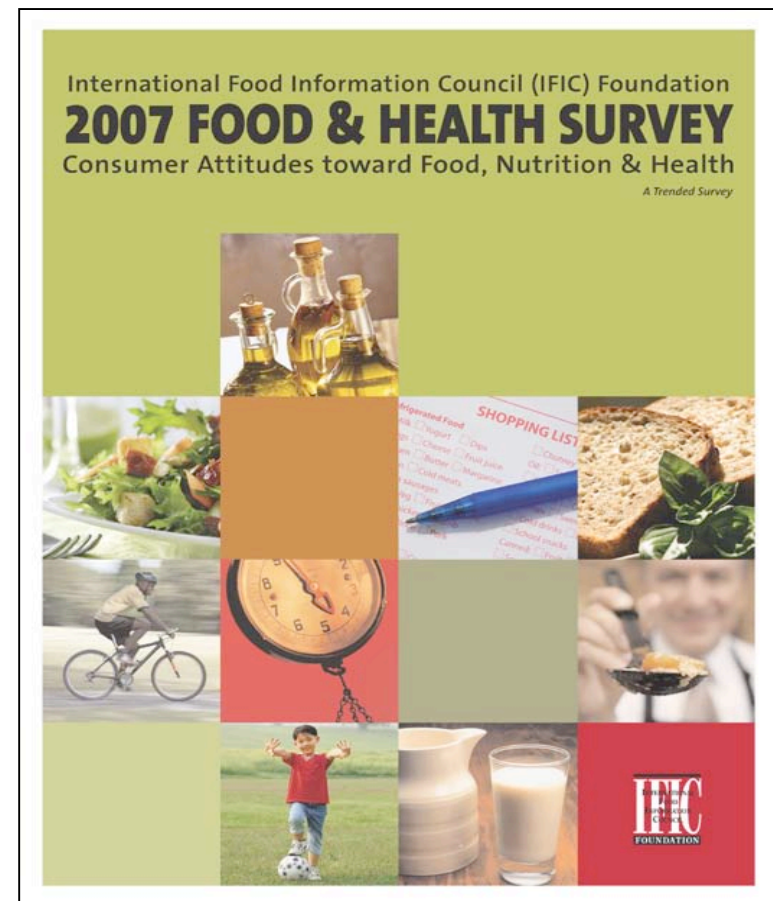
To effectively communicate science-based information on food safety and nutrition to health professionals, government officials, educators, journalists, and others providing information to consumers.

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

IFIC and IFIC Foundation Trended Research



IFIC Consumer Attitudes Toward Functional Foods



IFIC Foundation Food & Health Survey

<http://ific.org>

Methodology

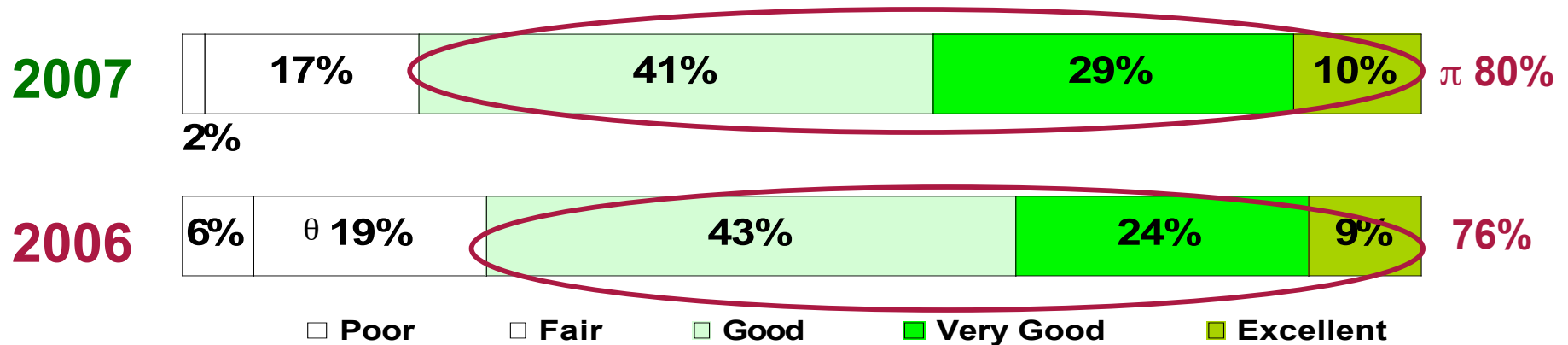
METHODOLOGY	Web survey
POPULATION	Representative sample of Americans aged 18+
DATA COLLECTION PERIOD	February 19-March 9, 2007
SAMPLE SIZE (ERROR)	n=1,000 (\pm 3.1) pp
DATA WEIGHTING*	Data weighted to the US Census by age, education, and gender

*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.

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Majority of Consumers' Rate Their Health Status as Good, Very Good, or Excellent



Which of the following best describes your overall health status? (n=1000)

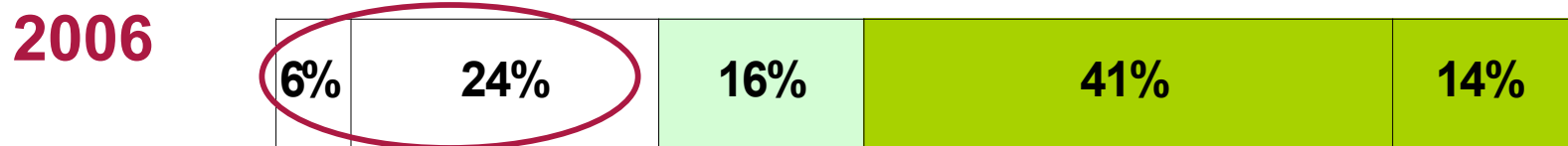
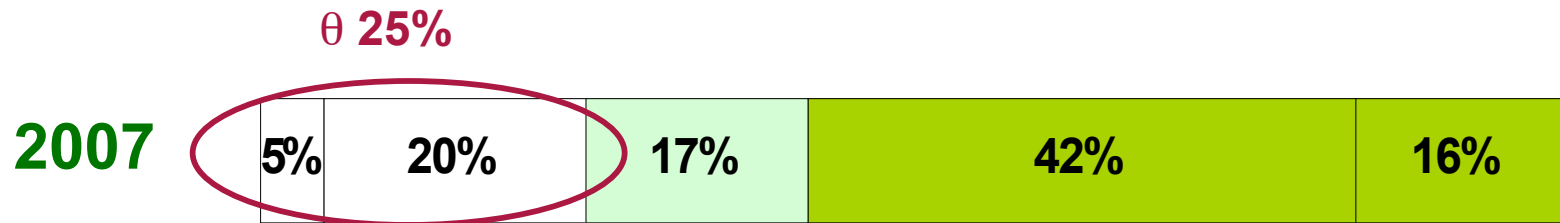
π Significant increase from '06
 θ Significant decrease from '06

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However, Not All Consumers are Satisfied with Their Health Status



- Not At All Satisfied
- Not Very Satisfied
- Neither Satisfied Nor Unsatisfied
- Somewhat Satisfied
- Extremely Satisfied

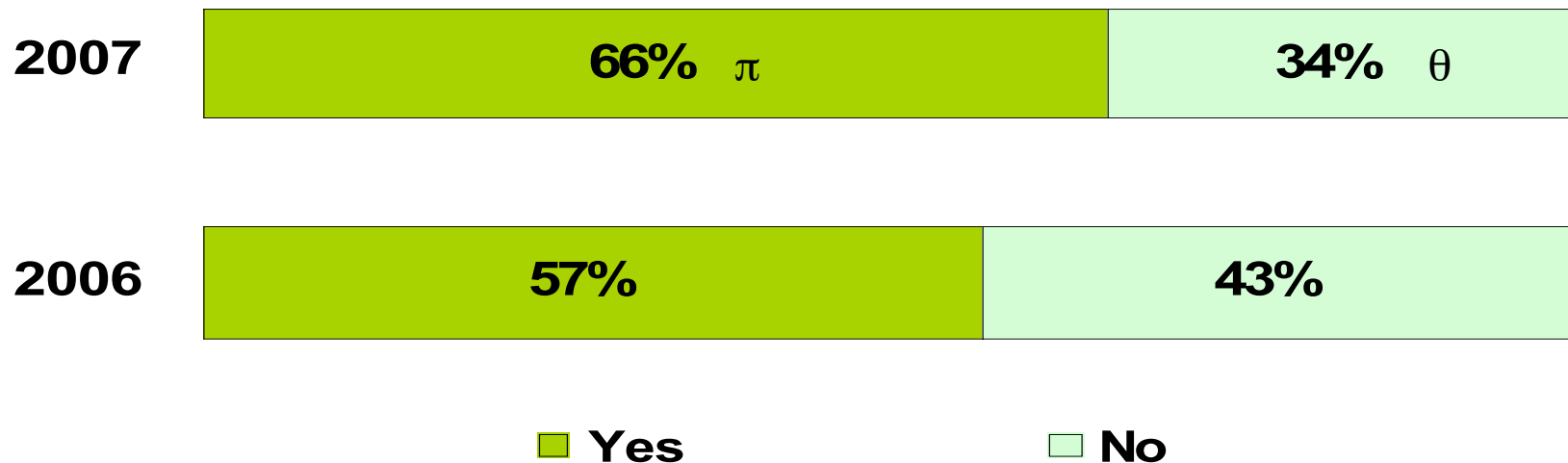
How satisfied are you with your overall health status? (n=1000)

⊖ Significant decrease from '06

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Prevalence of Dietary Changes

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



π Significant increase from '06
 θ Significant decrease from '06

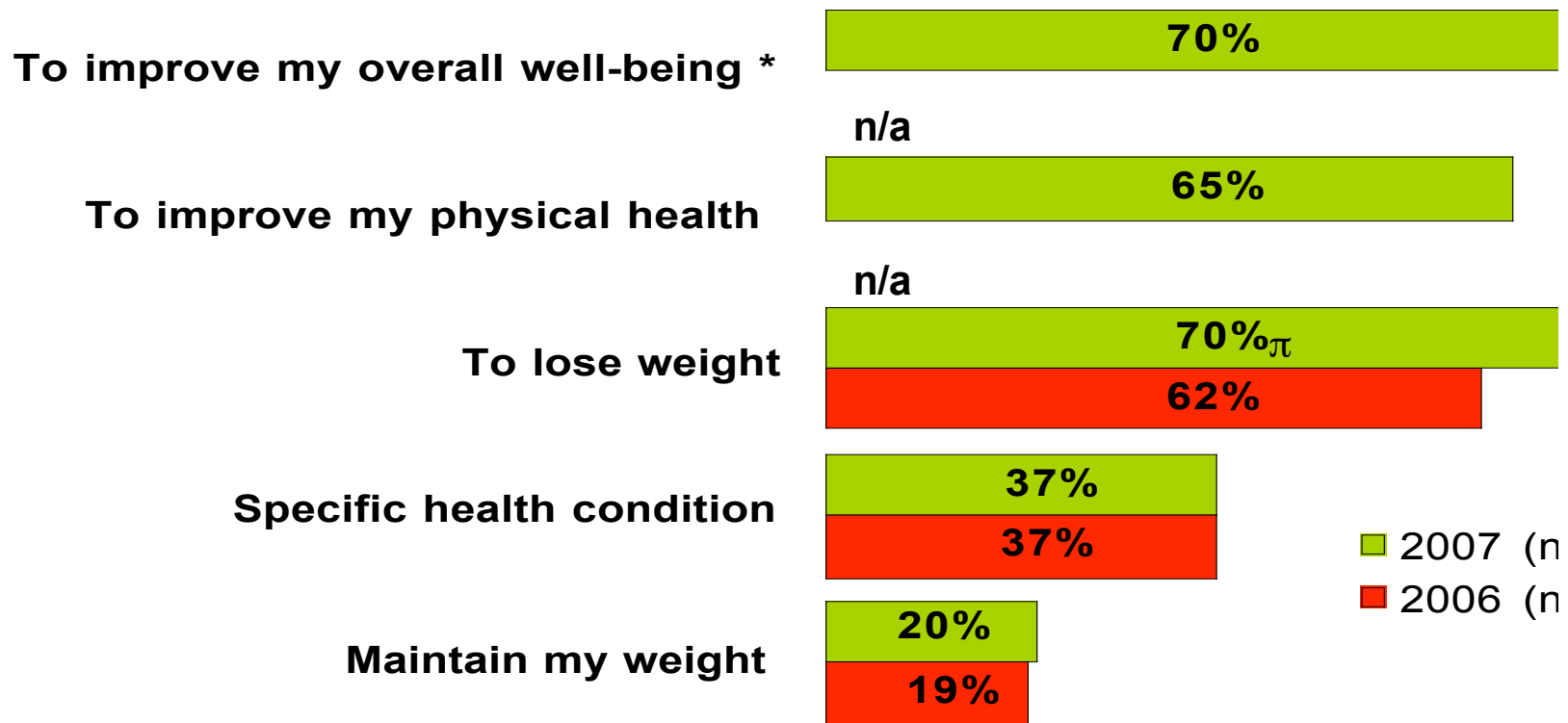
(n=1000)

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Drivers of Dietary Changes

For which of the following reasons, if any, are you trying to improve the healthfulness of your diet?



^π Significant increase from '06

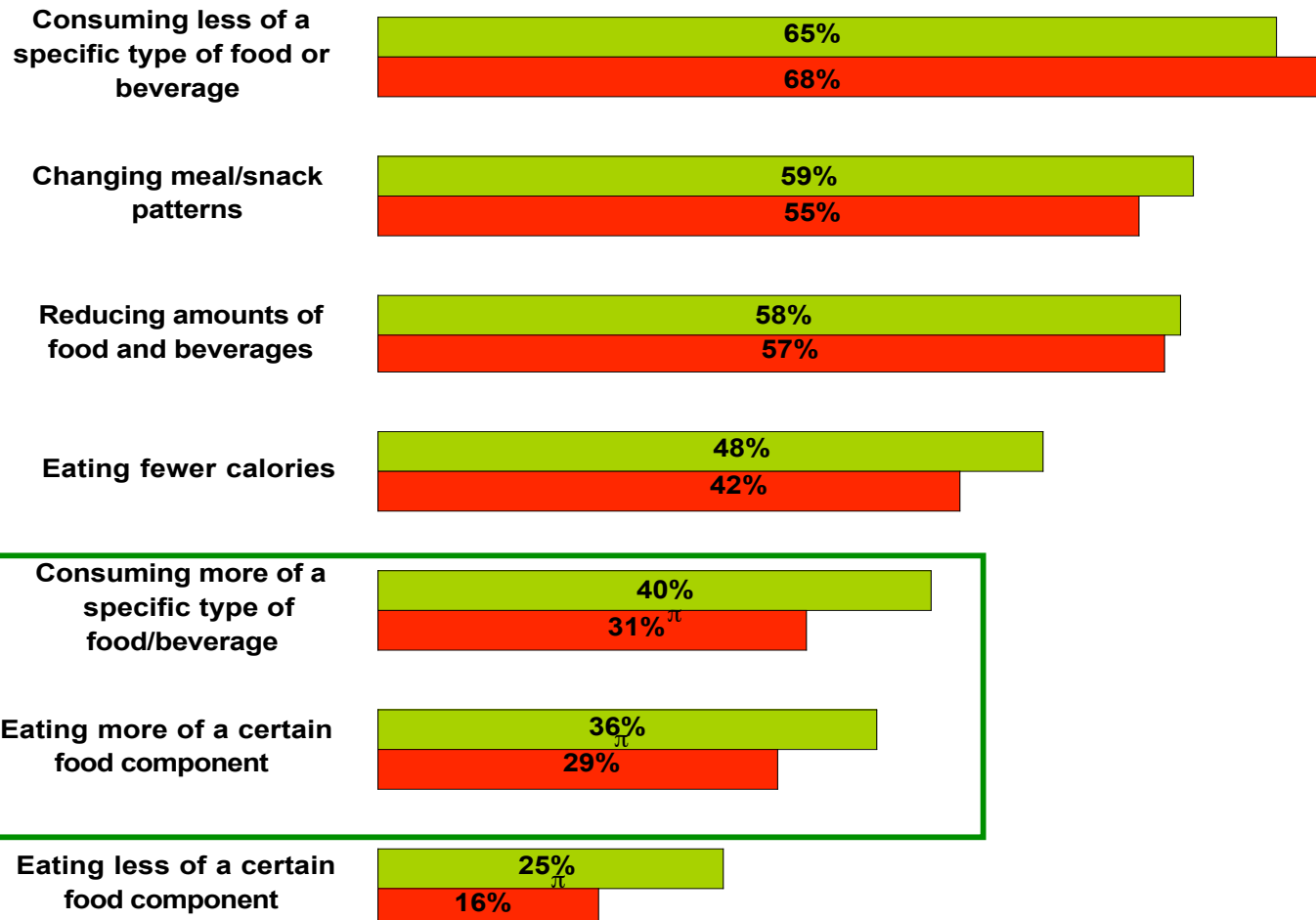
* **Modification from 2006:** “To improve my overall health” (69%) was changed to two items, including “To improve my overall well-being” and “To improve my physical health”.

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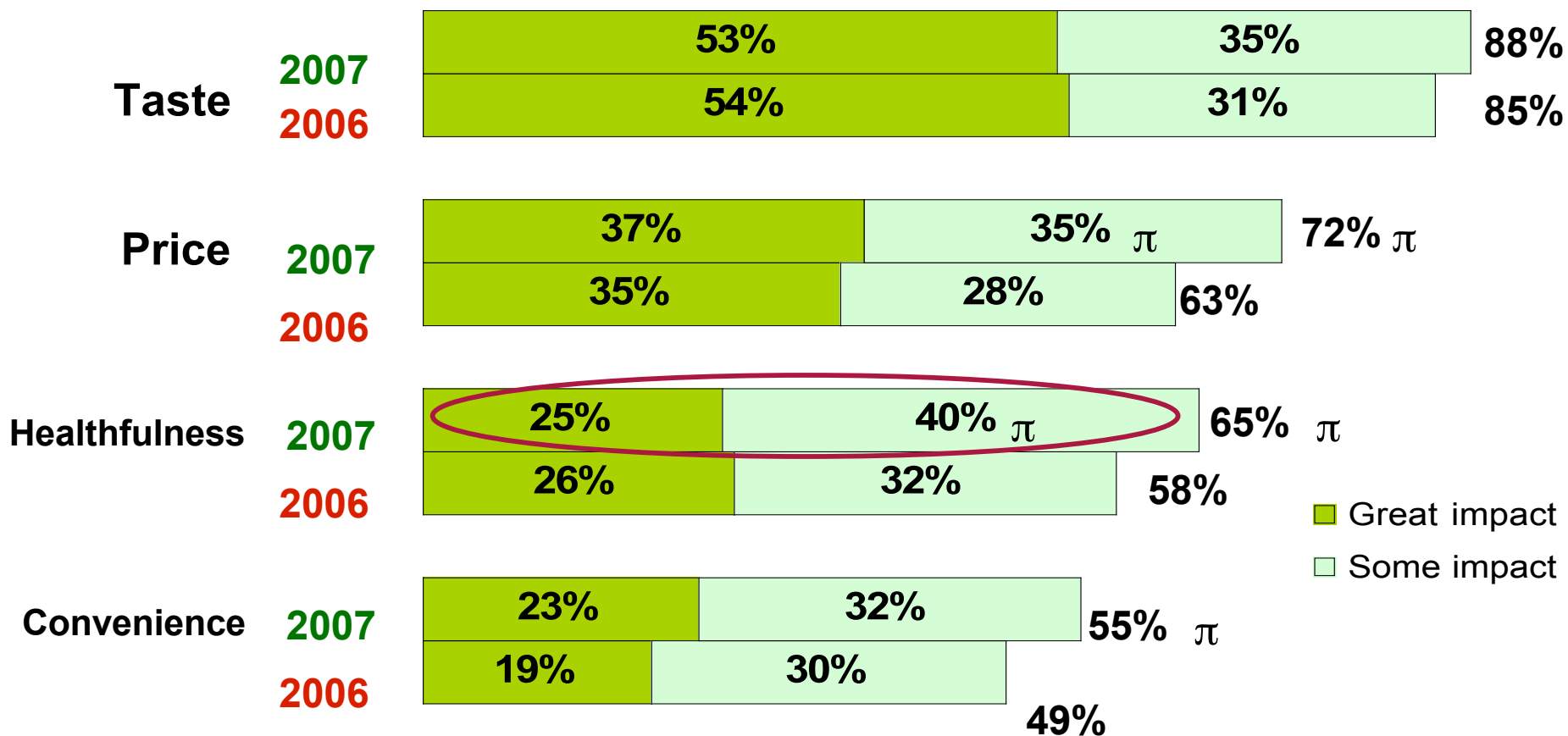
Changes Made to Improve Healthfulness of Diet

[Prompted] What have you done to improve the healthfulness of your diet in the past six months?



Healthfulness Increases as a Top Factor Influencing Purchasing Decisions

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



π Significant increase from '06

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Concern with Carbohydrates

How concerned are you, if at all, with the amount of carbohydrates you consume?

2007

19%

25%

55%

2006

22%

27%

51%

How concerned are you, if at all, with the types of carbohydrates you consume?

2007

20%

28%

52% π

2006

24%

30%

47%

Not Concerned

Neither

Concerned

(n=1000)

π Significant increase from '06

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Awareness of Sugars, Low-Calorie Sweeteners, and Carbohydrates

Percent Heard (n=1000)

Carbohydrates

Whole grains

83% θ

87%

Fiber

83% θ

87%

Complex carbs

59%

58%

Refined carbs

41%

42%

■ 2007

■ 2006

θ Significant decrease from '06

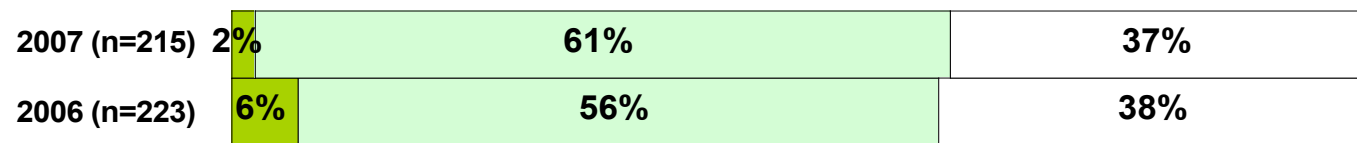
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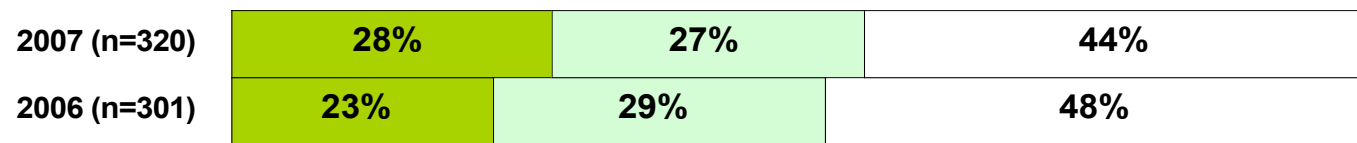
Carbohydrates Consumption Trends



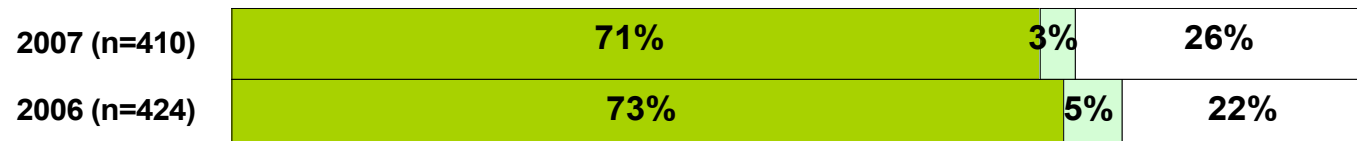
Refined carbs



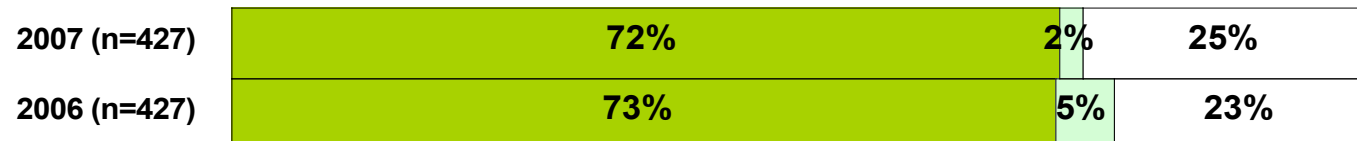
Complex carbs



Whole grains



Fiber



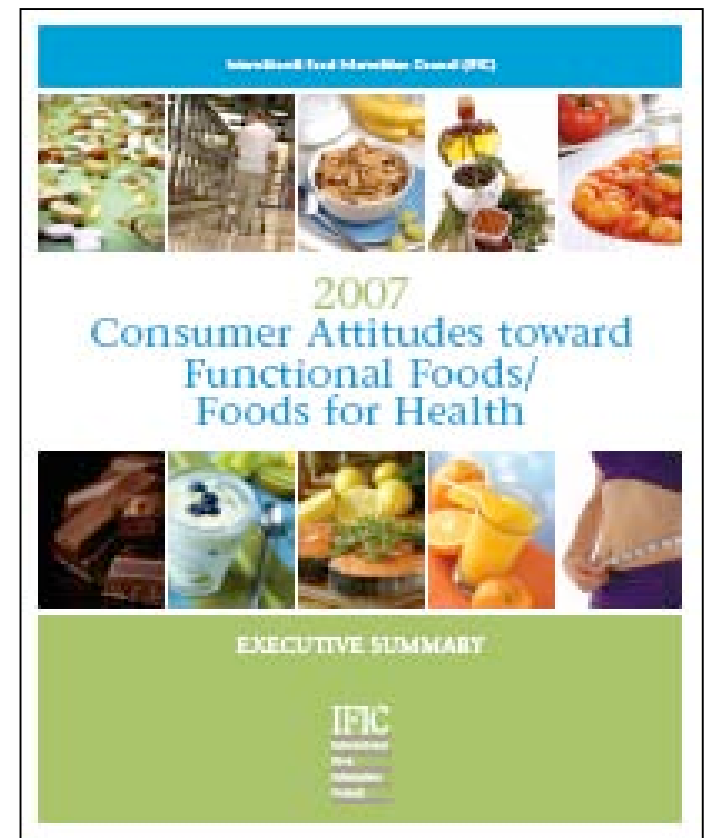
More

Less

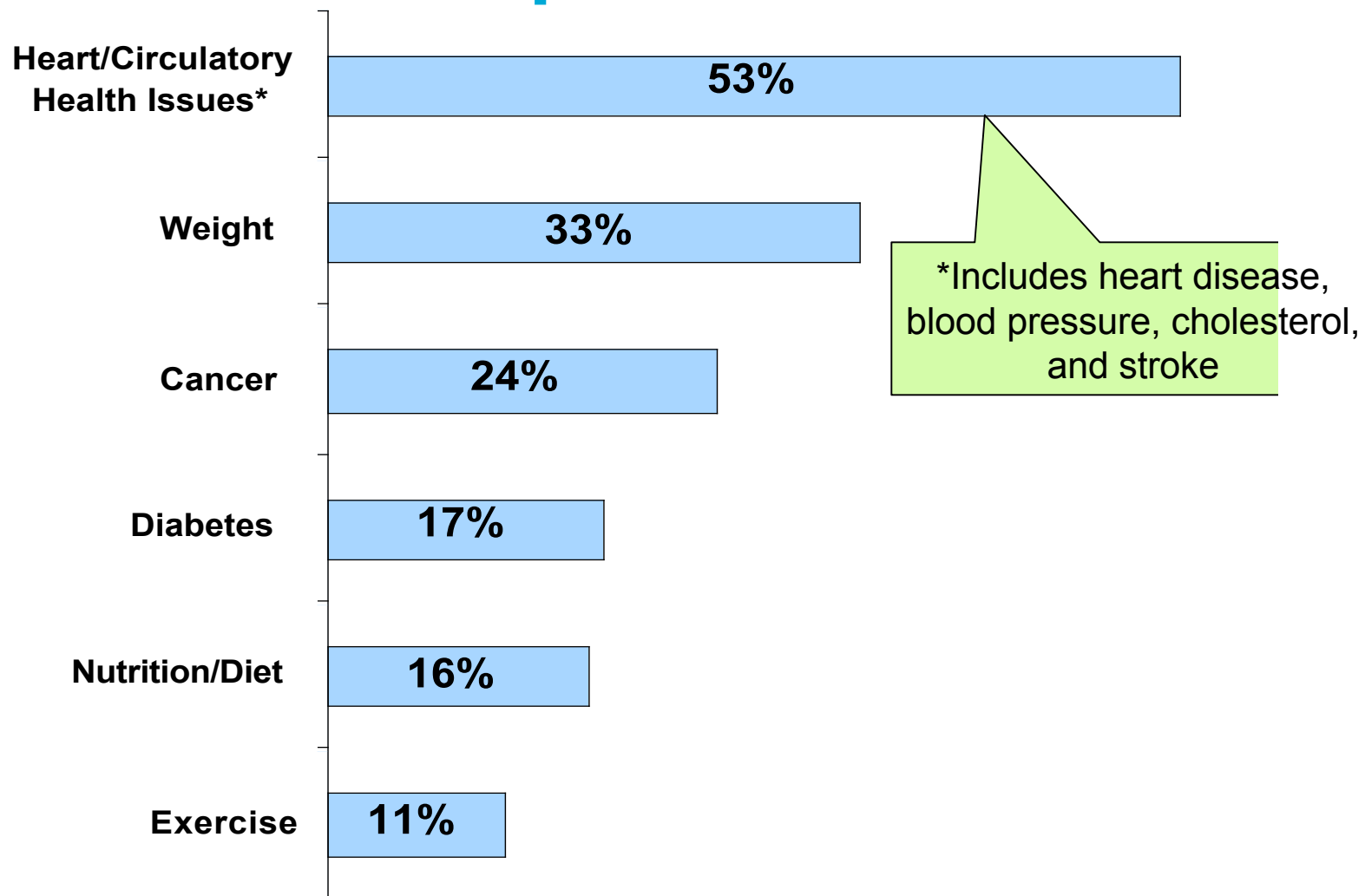
Neither

IFIC Functional Foods/ Foods for Health Research 1998, 2000, 2002, 2005, and 2007

- Measure consumer interest in and awareness of “functional foods” and “personalized nutrition”
- Methodology: Telephone survey by Cogent Research, Cambridge, MA (1998, 2000, 2002); Web-based survey (2005, 2007)
- Sample population: randomly selected U.S. Adults (18 ≥ yrs old)
- Completed interviews/sample size: 1,000 (2005-2007)



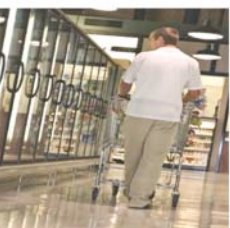
Americans' Top Health Concerns



What are your top three health concerns, listed in order of importance to you?

(Unaided, Multiple Responses) (n=1000)

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Top Ten “Functional Foods” Named by Consumers

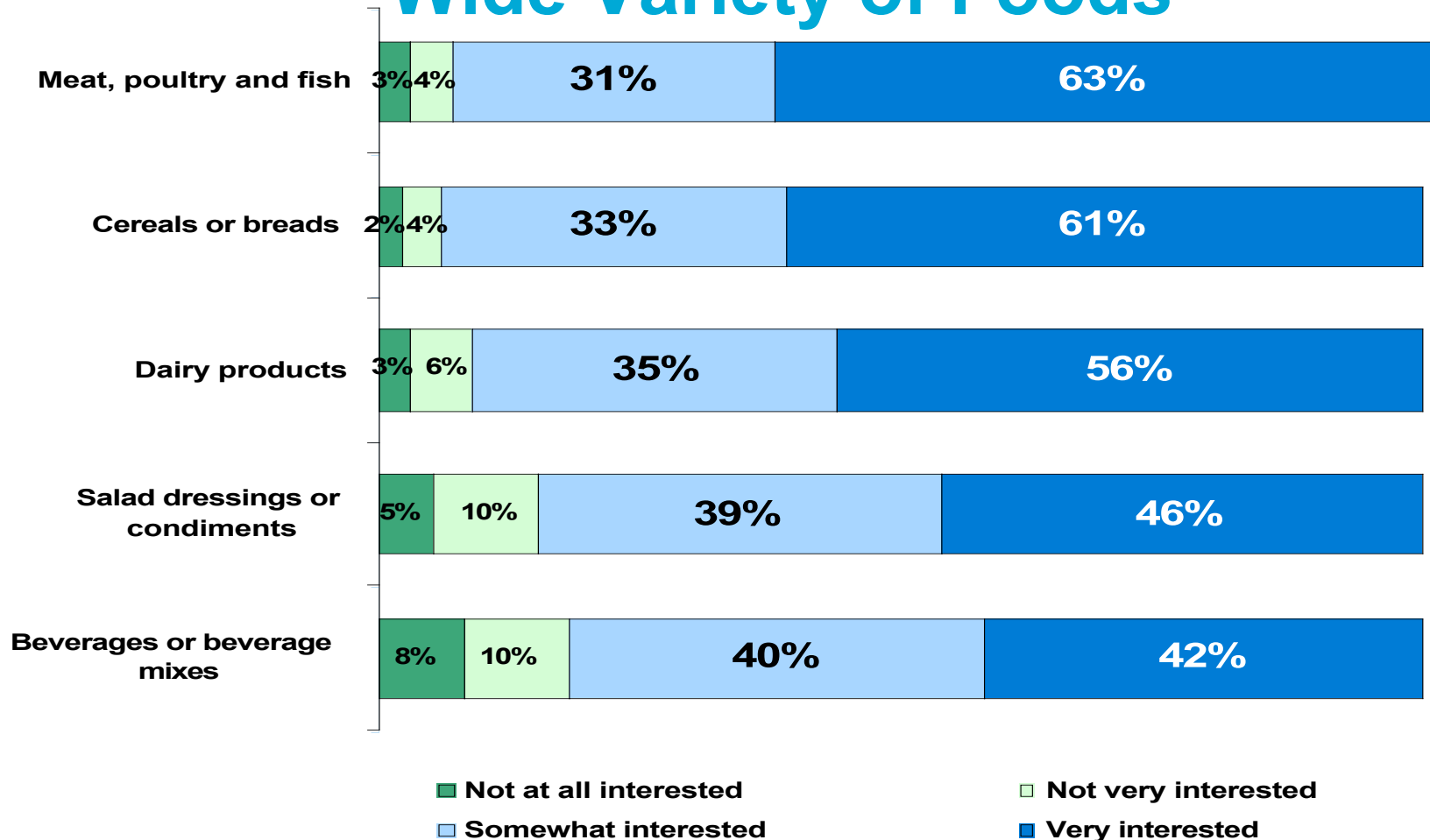
1. Fruits and vegetables
2. Fish, fish oil, seafood
3. Milk and other dairy products
4. Whole grains, including oats, oat bran, oatmeal
5. Fiber
6. Green tea
7. Meat, red meat, and chicken
8. Water
9. Herbs/spices
10. Nuts

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=1000)

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Consumers are Interested in Getting Health Benefits From a Wide Variety of Foods



Which of the following types of food, if any, would you be interested in consuming if they had any of the specific benefits that you wanted from food components? (n=891)

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Food Components Identified as Benefiting Cardiovascular Health

High Cholesterol/Heart Disease

- Oats/oat bran 18%
- Cereal 12%
- Fish/fish oil 7%
- Garlic 5%
- Whole Grain 5%
- Low-fat foods 2%
- Fiber 4%

High Blood Pressure

- Garlic 7%
- Oats, oat bran 4%
- Fish, fish oil 4%
- Cereal 3%
- Fiber 2%

For each disease and health concern, please indicate, as far as you know, what foods or food components are thought to reduce the risk of that health concern.

(Split Sample, n=499)

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Food Components Identified as Beneficial in Obesity Prevention & Weight Management

Obesity/ Prevention of Unhealthy Weight Gain

- Water 7%
- Low-fat foods 6%
- Milk 6%
- Fish, fish oil 4%
- Fiber 3%
- Whole Grain 3%
- Green tea 3%

Weight Management

- Low-fat foods 6%
- Milk 5%
- Fiber 4%
- Green tea 3%
- Whole grain 3%
- Fish, fish oil 3%

For each disease and health concern, please indicate, as far as you know, what foods or food components are thought to reduce the risk of that health concern.

(Split Sample, n=499)

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Food Components Identified as Reducing the Risk of Certain Cancers

Breast Cancer

- Milk 5%
- Broccoli 3%
- Green, leafy veg. 3%
- Soy 2%

Prostate Cancer

- Tomatoes 5%
- Saw palmetto 4%

Colon Cancer

- Fiber 20%
- Whole grain 4%
- Green, leafy veg. 6%
- Broccoli 4%
- Water 2%
- Bran 2%

For each disease and health concern, please indicate, as far as you know, what foods or food components are thought to reduce the risk of that health concern.

(Split Sample, n=499)

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High Awareness of Some Long-Established Diet & Health Pairs

Calcium for the promotion of bone health
(n=503)

89%

Fiber for maintaining a healthy digestive
system (n=497)

86%

Vitamin D for the promotion of bone health
(n=497)

81%

Omega-3 fatty acids for reduced risk of
heart disease (n=497)

76%

Fiber for reduced risk of heart disease
(n=497)

74%

Fiber for reduced risk of cancer (n=503)

73%

Whole grains for reduced risk of heart
disease (n=503)

72%

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).

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Top Food Components Consumed for Added Benefits



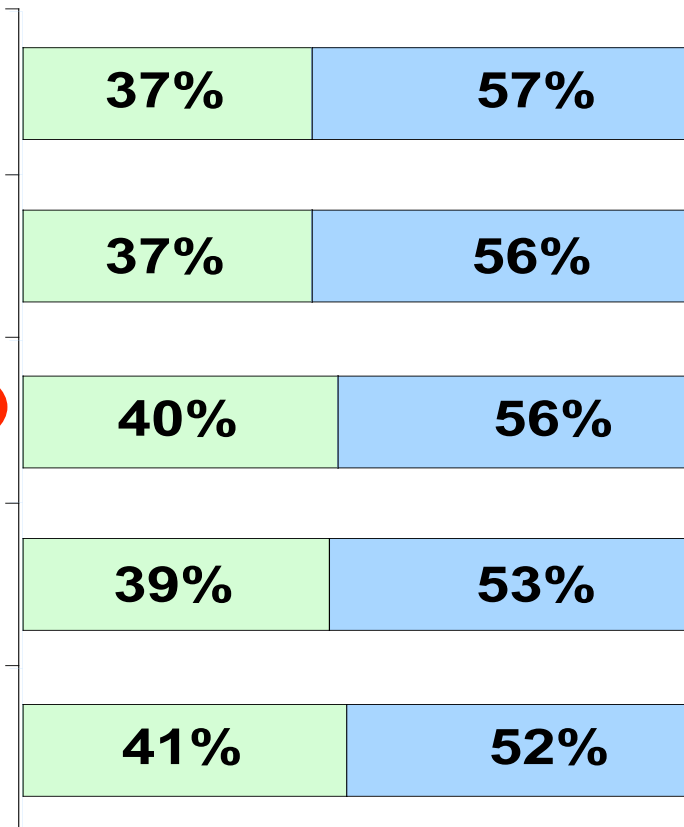
Fiber for maintaining a healthy digestive system
(n=427)

Calcium for the promotion of bone health
(n=449)

Whole grains for reduced risk of heart disease
(n=362)

Vitamin D for the promotion of bone health
(n=403)

Antioxidants for protection against free radical damage implicated in aging and various chronic diseases (n=357)



■ Very or somewhat likely to consume

■ Already eating for that effect

Please indicate how likely you are to begin eating each of the food components or nutrients for each of the health benefits in the next 12 months (Split Sample).

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In Summary

- A high majority of consumers (83%) are aware of fiber and whole grains.
- Of those who are aware, nearly all understand that whole grains and fiber are healthful.
- Consumers identify whole grains and fiber as food components thought to benefit certain health conditions such as reducing the risk of heart disease or cancer.
- Taste is the most important factor in purchasing decisions but healthfulness is increasing in priority.





Thank You

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