



# **Leveraging Consumer Preferences to Increase Whole Grain Consumption: Findings from the 2023 Whole Grain Consumer Insights Survey**

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# Disclosures

- Caroline Sluyter and Kelly LeBlanc are both employees of Oldways, the 501(c)3 nonprofit that founded and runs the Oldways Whole Grains Council
- No commercial support was received for this presentation

# Housekeeping

- Attendees will receive an email within ONE WEEK with **CPEU certificate, slides, and recording**
- Visit **[oldwayspt.org/CPEU](https://oldwayspt.org/CPEU)** to register for upcoming webinars or view recordings of previous webinars
- Please submit any questions using the Q&A function in Zoom
- Please join us for our upcoming webinars!



# About Oldways

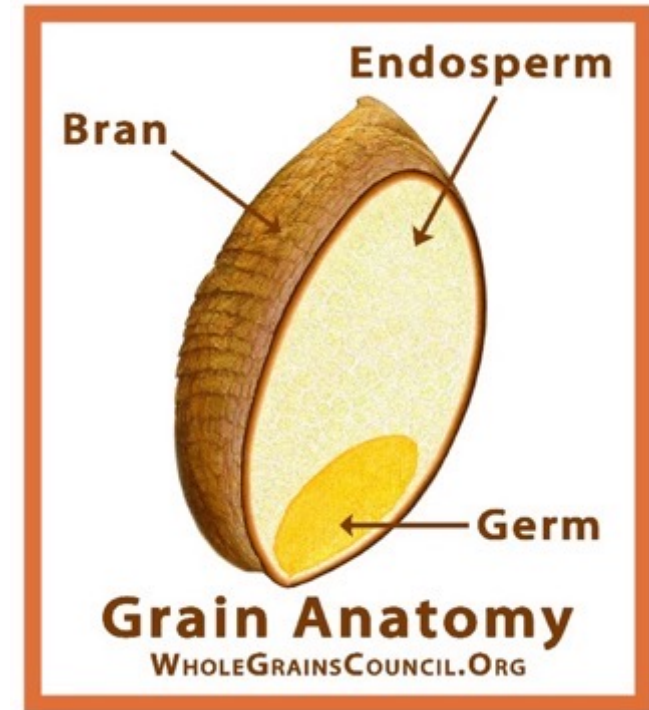
- **Our Vision**  
A healthier, happier life through cultural food traditions.
- **Our Mission**  
We inspire people to embrace the healthy, sustainable joys of the old ways of eating.
- **Best Known for**  
Creating the Mediterranean Diet Pyramid and other Heritage Diet Pyramids, Creating the Whole Grain Stamp, Culinary Travel



# About the Oldways Whole Grains Council

## Our three-part mission:

- To help consumers find whole grain foods and understand their health benefits
- To help manufacturers and restaurants create delicious whole grain foods
- To help the media write accurate and compelling stories about whole grains



# The Whole Grain Stamp Program



100% OF THE GRAIN IS WHOLE GRAIN



50% OR MORE OF THE GRAIN IS WHOLE GRAIN



EAT 48g OR MORE OF WHOLE GRAIN DAILY

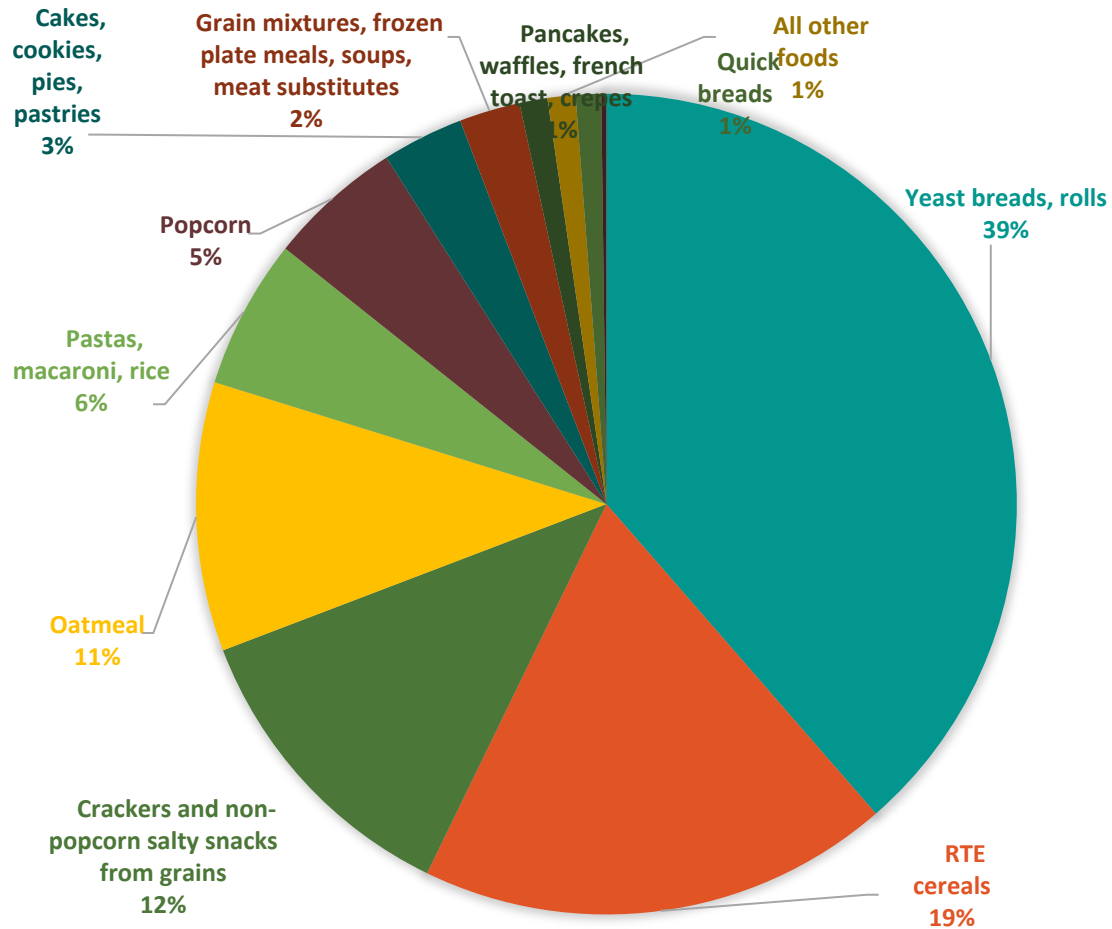
- ALL grain is whole grain
- Minimum of 16g whole grain per serving
- At least 50% of grain is whole grain
- Minimum of 8g whole grain per serving
- More refined grain than whole grain
- Minimum of 8g whole grain per serving

No product with less than 8g of whole grain per serving can use the Whole Grain Stamp, so consumers can be confident that they are getting **at least a half serving of whole grain** from any product bearing the Stamp.

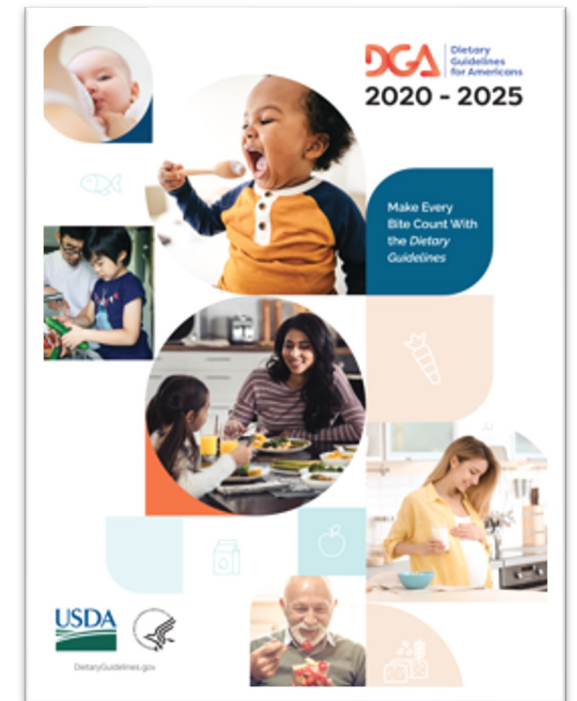
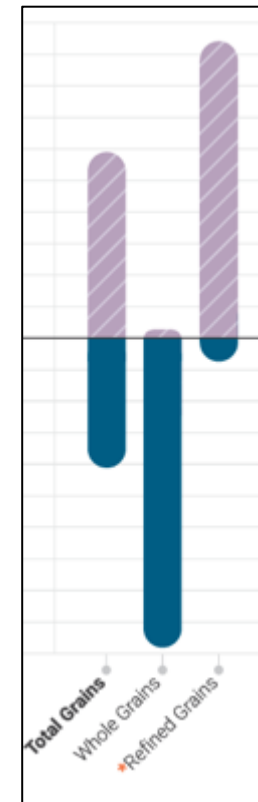


# Setting the Stage: Existing Whole Grain Data

**Bread and cereal** are the main sources of whole grain in US diets (NHANES 2012)



98% of Americans are falling short of recommended whole grain intake (2020-2025 DGA, citing NHANES 2016)





# Setting the Stage: Consumers Overwhelmingly Recognize Whole Grains as Healthy

- **Nearly 80%** of consumers perceive whole grains as healthful, more than all other food groups and nutrients listed except fiber (IFIC, 2020)
- **More than half** of consumers are trying to eat more whole grains (IFIC, 2021)
- Respondents found grains to have the **smallest negative impact on the environment** of all foods listed (IFIC, 2021)
- **62% of millennials** and **52% of baby boomers** report that the “perfect dish” that is healthy, tasty, and good for the planet would contain whole grains (Gervis, 2021)



# About Our Survey and Its Demographics

## Region

Northeast	19%
Midwest	23%
South	36%
West	22%

## Gender

Male	51%
Female	48%
Non-binary	0%

## Age/Generation

Gen Z (18–22)	7%
Millennials (23–38)	29%
Gen X (39–54)	31%
Boomers (55–73)	28%
Silent Generation (74+)	6%

## Race

Caucasian	65%
Black	16%
Hispanic or Latinx	19%
Asian	7%
American Indian	3%
Other	1%
Prefer not to answer	0%

## Income

Under \$25,000	16%
\$25,000–\$49,999	31%
\$50,000–\$74,999	16%
\$75,000–\$99,999	16%
\$100,000–\$124,999	7%
\$125,000–\$149,999	7%
\$150,000–\$249,999	5%
\$250,000 or more	2%

## Children in Household

Yes	29%
No	71%

## Children's Ages (of those who said yes to having children in household)

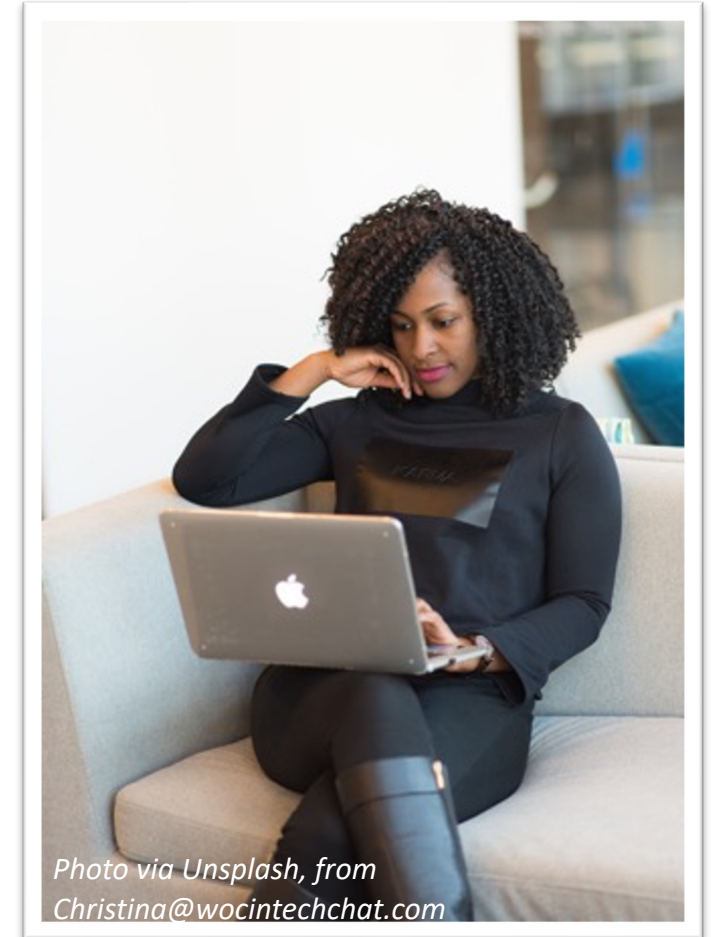
Age 5 and under	33%
6–12 years	55%
13–17 years	49%

## Education

Some high school or less	3%
Completed high school	18%
Trade/technical school	5%
Some college	23%
Completed college	35%
Graduate degree	16%

# Why Conduct the Survey?

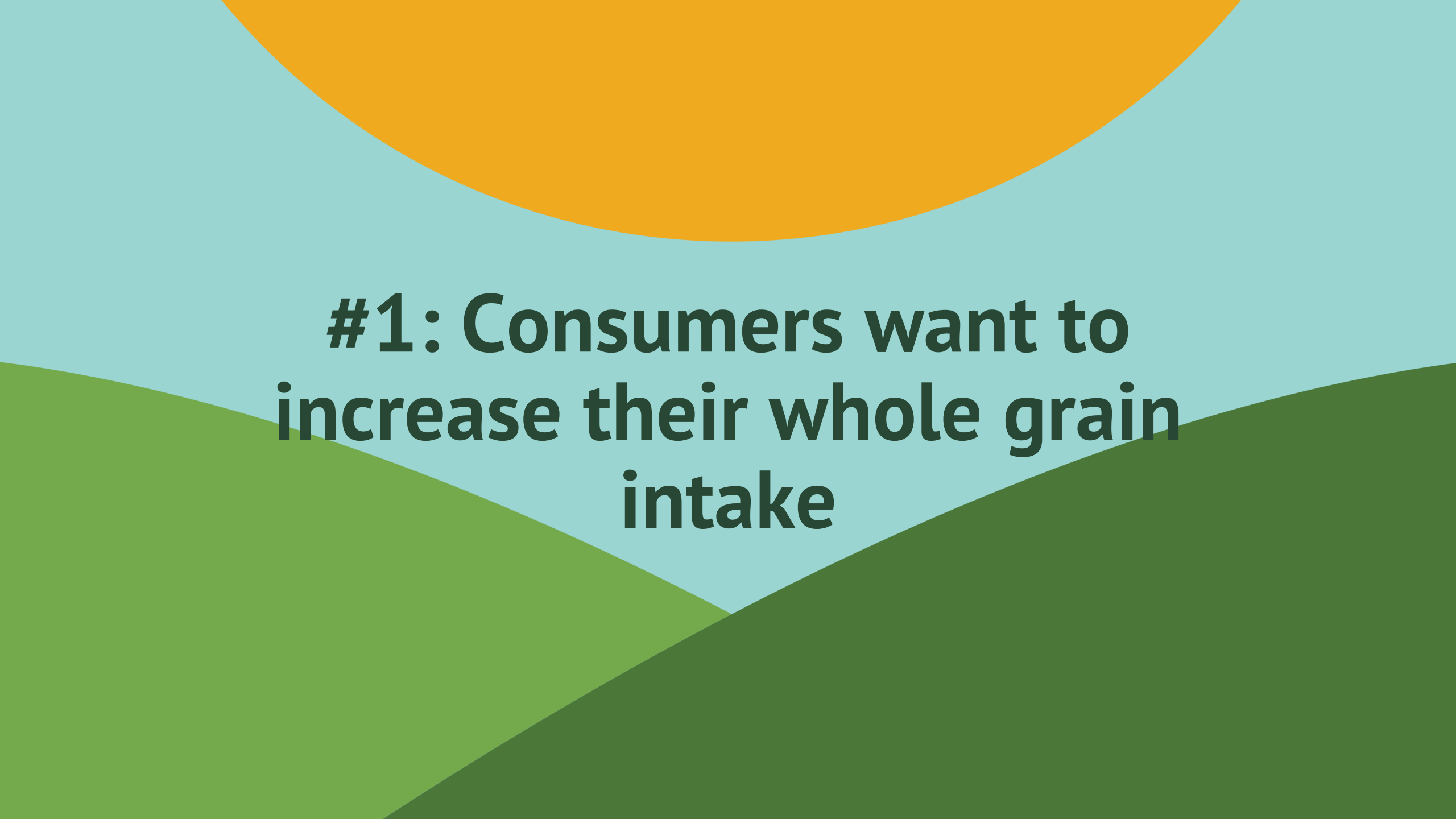
- National survey reporting on whole grain intake (NHANES) lags 4-5 years behind
- The latest NHANES data we have on whole grain intake is still from pre-COVID (2018)
- The food and nutrition landscape has changed rapidly over the last few years





# Outline of Key Findings

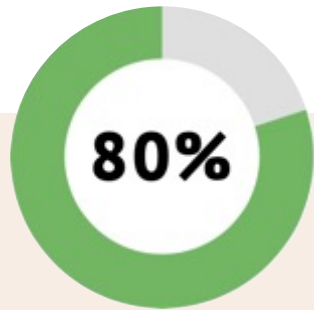
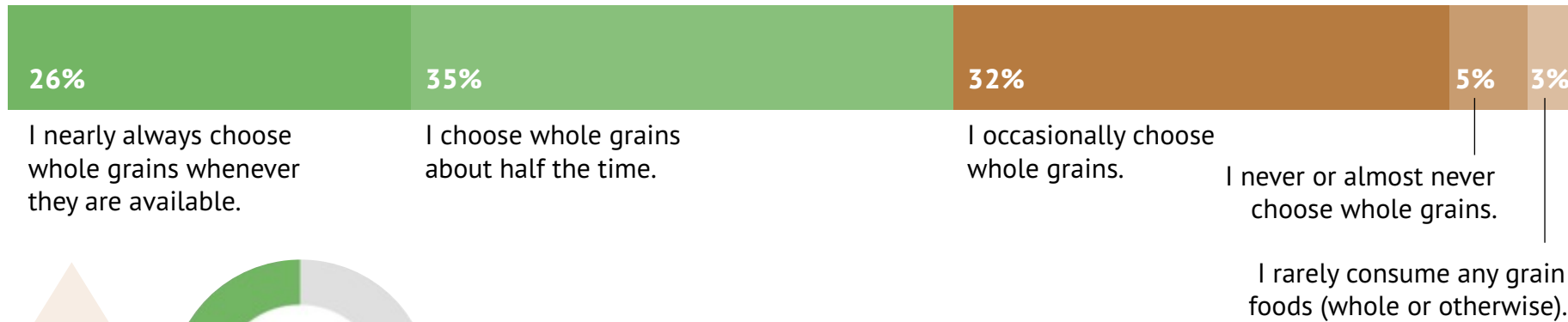
1. Whole grain intake on the rise
2. The Whole Grain Stamp as a powerful and trusted tool
3. The importance of whole grain content labeling and third-party certifications
4. Consumer sensitivity to food prices
5. Low-carb and gluten-free fad diets on the decline
6. Sustainability as a motivation for choosing whole grains



**#1: Consumers want to  
increase their whole grain  
intake**

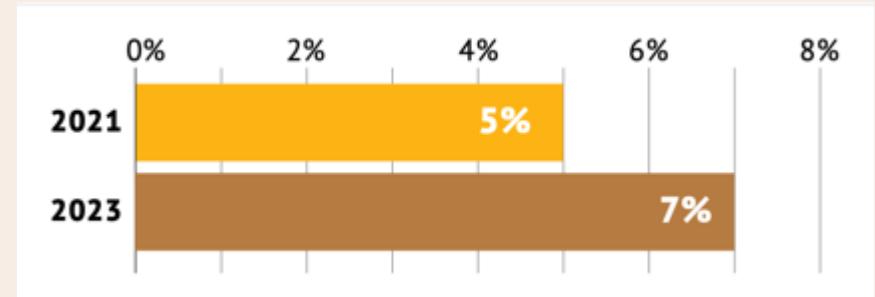
# A majority of all consumers—61%—say they choose whole grain options at least half the time.

## Overall consumer habits when choosing whole grains

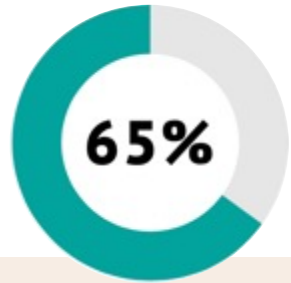


of people who nearly always choose whole grains started this habit in the past 5 years by increasing their whole grain consumption.

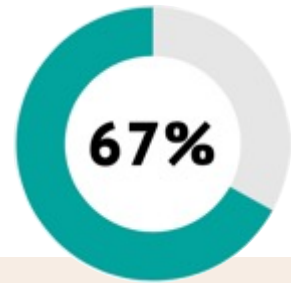
In 2023, significantly fewer consumers say they never or almost never choose whole grains than in 2021.



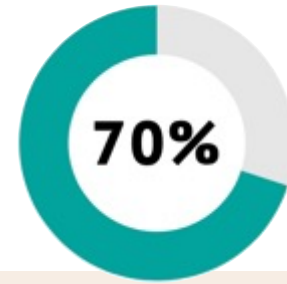
# In many demographic groups, an **even larger majority** of consumers choose whole grains at least half the time.



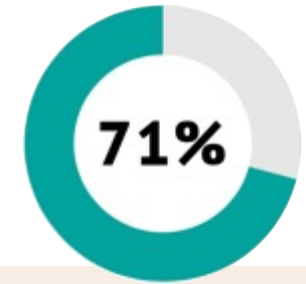
of Millennial consumers



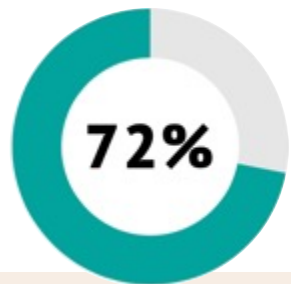
of parents (with kids at home)



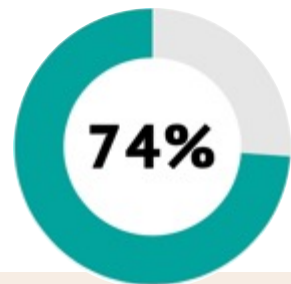
of plant-based eaters



of consumers who correctly defined gluten



of health-conscious consumers



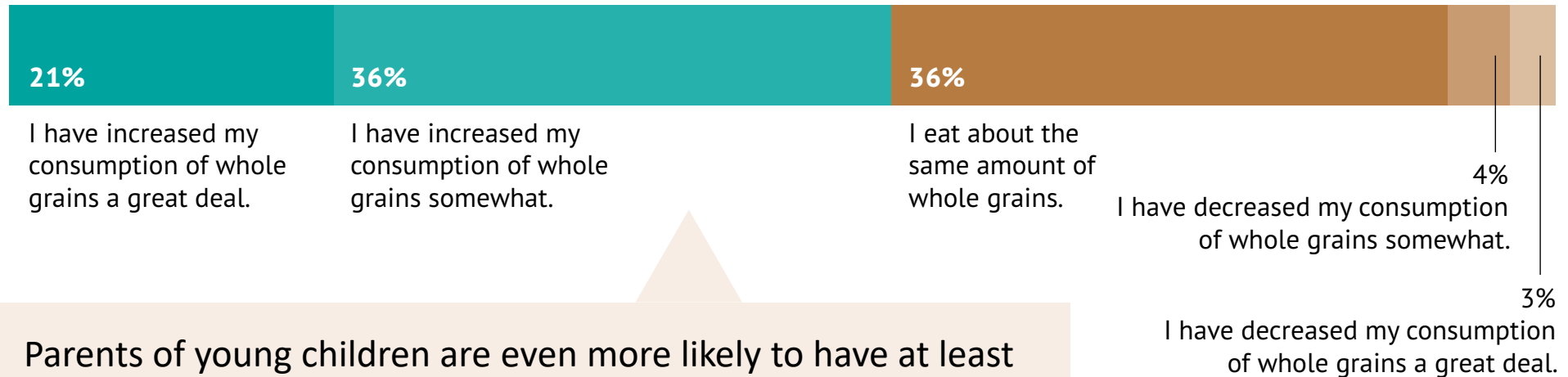
of low-carb consumers

Surprisingly, **low-carb consumers** are the **most likely** to choose whole grains at least half the time. This may indicate that they are really just avoiding low-quality, refined carbohydrates and seeking to replace those foods with whole grains and other high-quality carbohydrate sources.

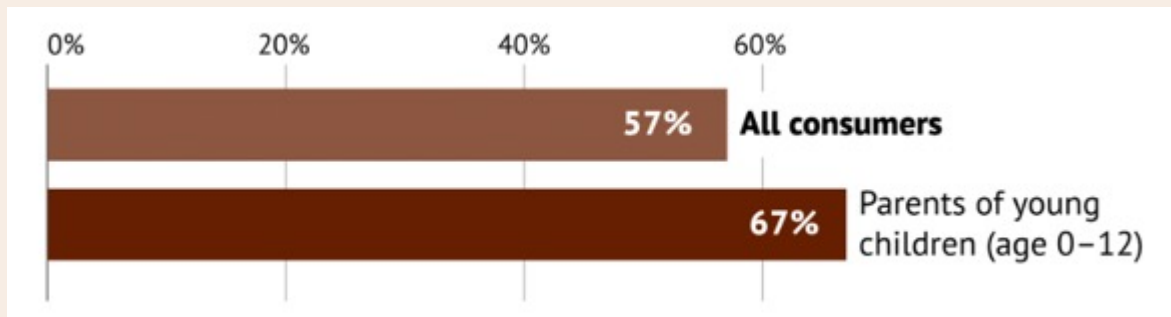


# Additionally, more than half of consumers have increased their whole grain consumption in the past five years.

## Changes in whole grain consumption over the past five years

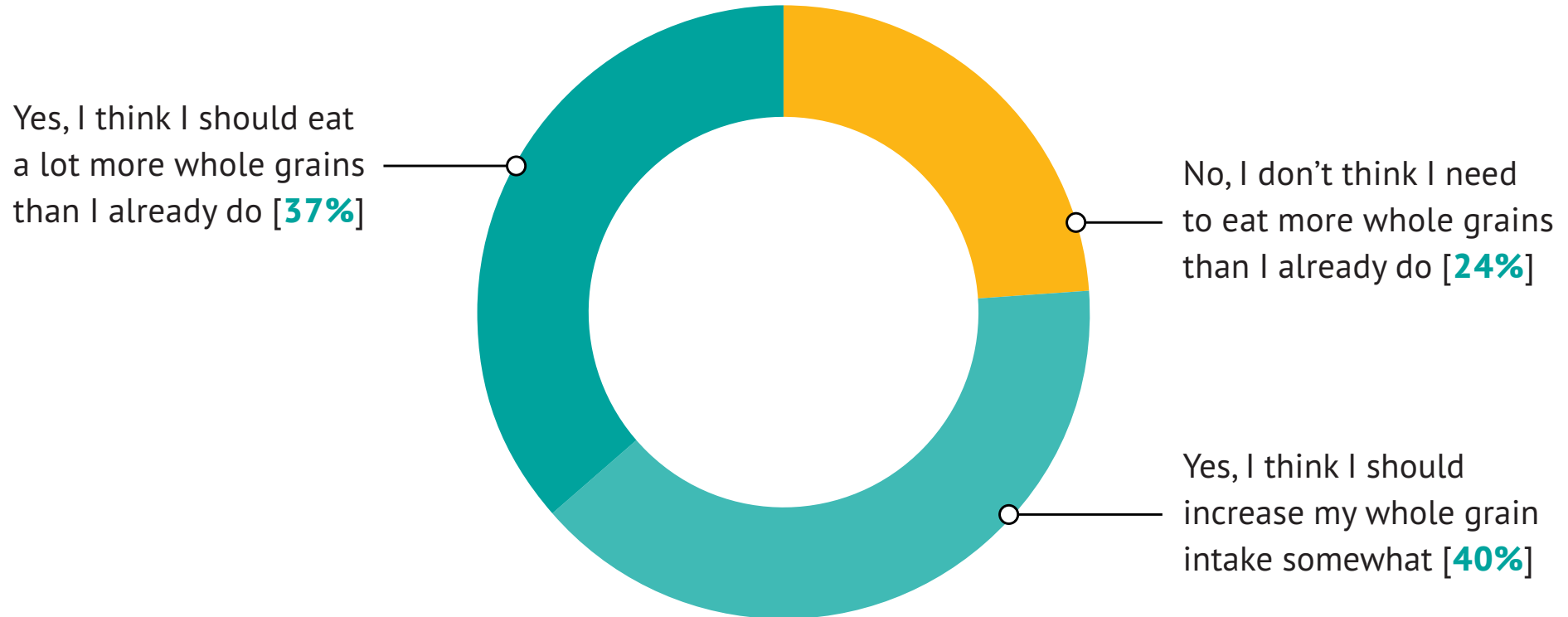


Parents of young children are even more likely to have at least somewhat **increased** the amount of whole grains they eat.



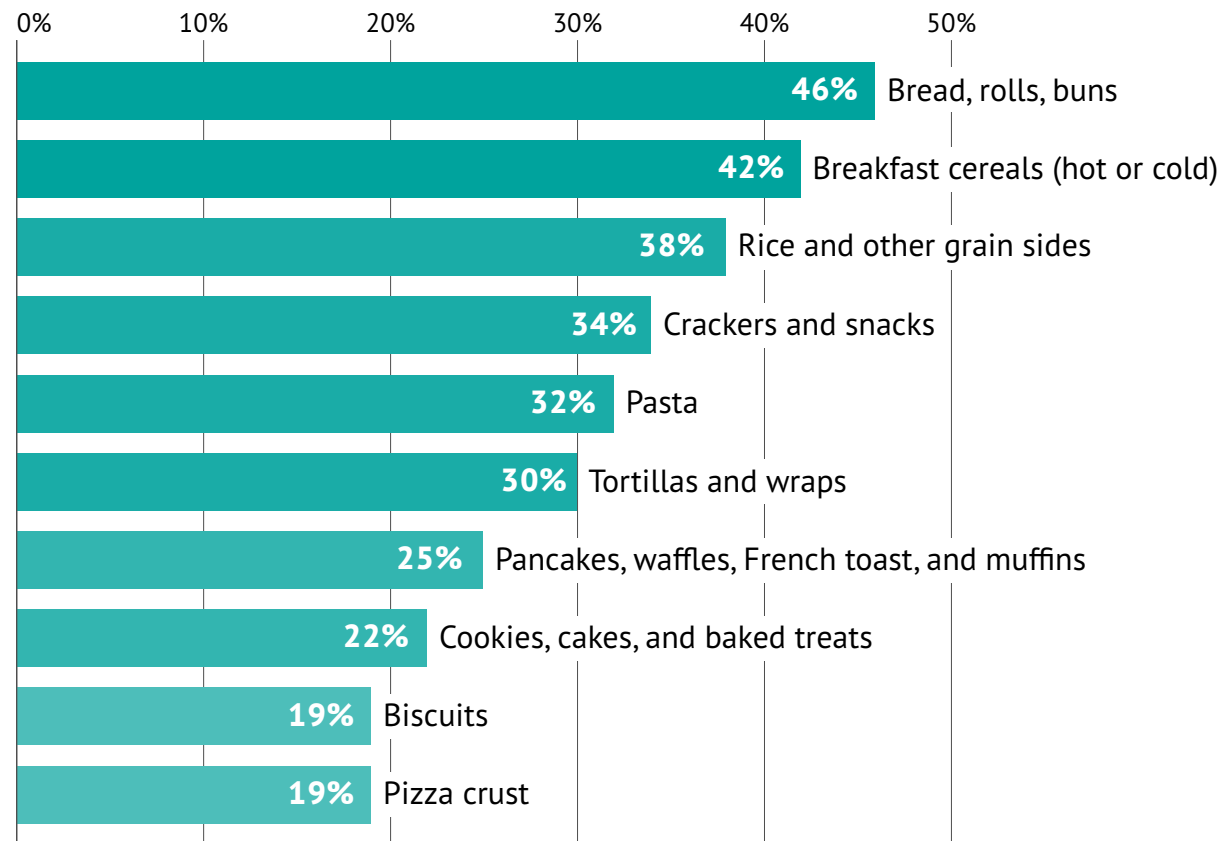
# More than **three quarters** of consumers think they should **eat more** whole grains.

Percentage of consumers who believe they should increase their whole grain intake

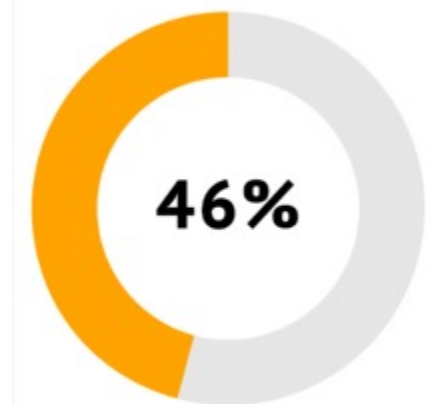


# Breads, breakfast cereals, and grain sides are the foods most commonly consumed as whole grains.

Frequency with which consumers choose whole grain versions of foods

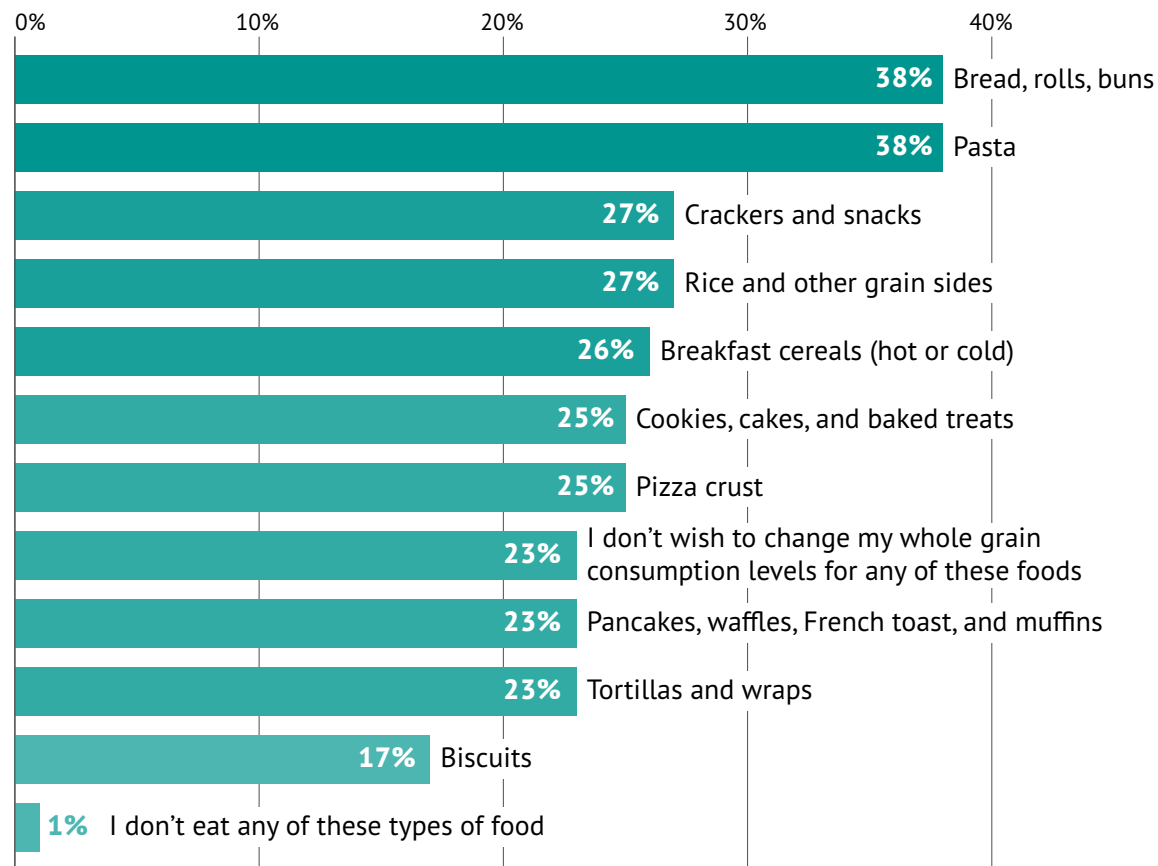


Consumers choose whole grain breads, rolls, and buns **nearly half the time**.

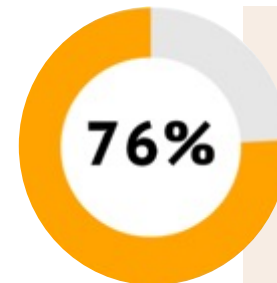


# Most consumers wish they ate more whole grains, particularly breads, pasta, crackers and snacks, and grain sides.

Percentage of consumers who want to increase their whole grain consumption in each category



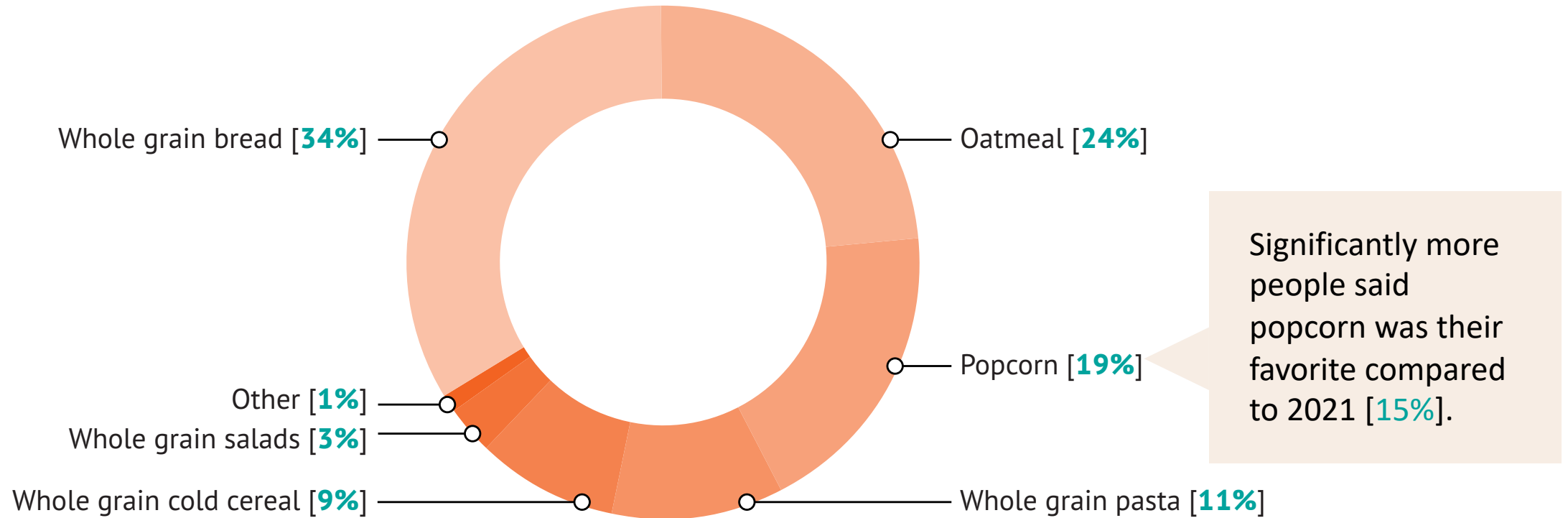
Significantly more consumers are interested in eating more whole grain pasta compared to 2021.



of consumers want to increase the whole grains they eat in at least one of these categories.

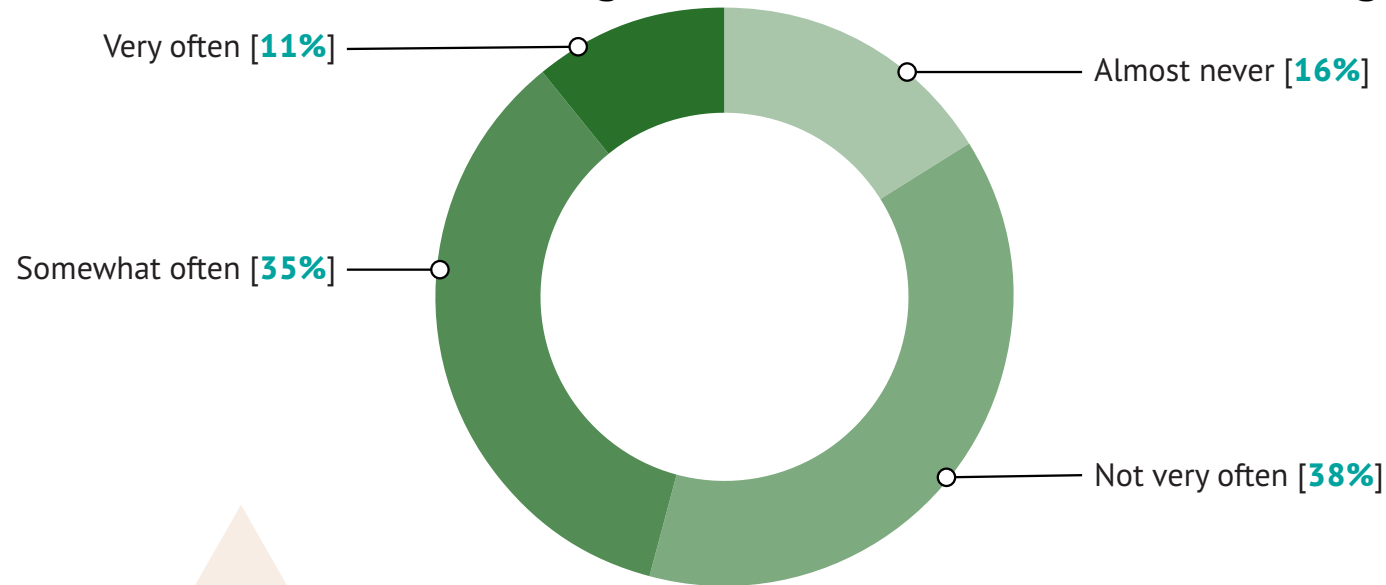
# Of those who eat whole grain foods, **one in three** says whole grain **bread** is their favorite food, with **oatmeal** as the runner-up.

Consumers' one favorite whole grain food

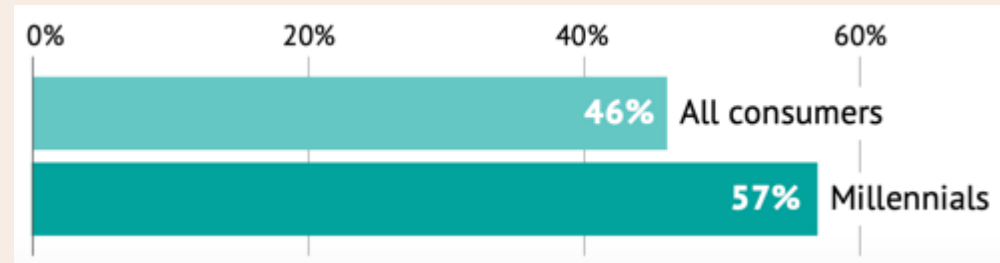


# Nearly **half** of consumers choose whole grain options at **restaurants** at least somewhat often.

Frequency with which consumers choose whole grains at restaurants or when ordering take-out/delivery



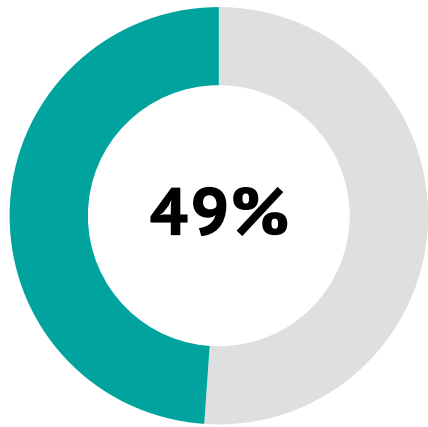
**Millennials** are the demographic group **most likely** to choose whole grains at restaurants somewhat or very often.



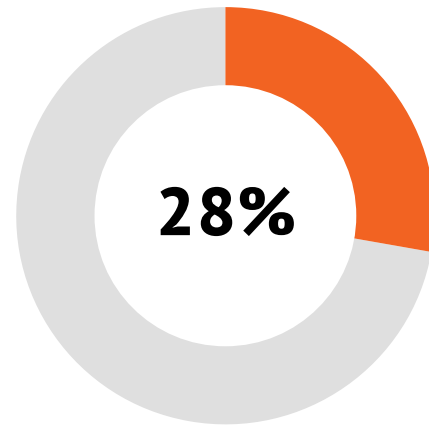


# Half of consumers eat whole grains for breakfast most or all of the time.

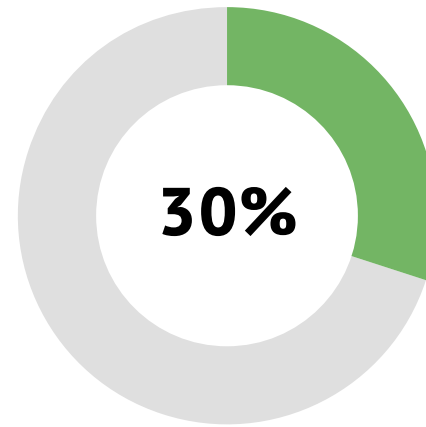
Meal during which consumers eat whole grains “most of the time” or “all of the time”



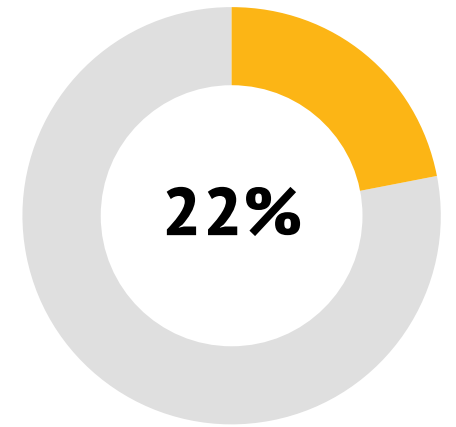
Breakfast




Lunch



Dinner



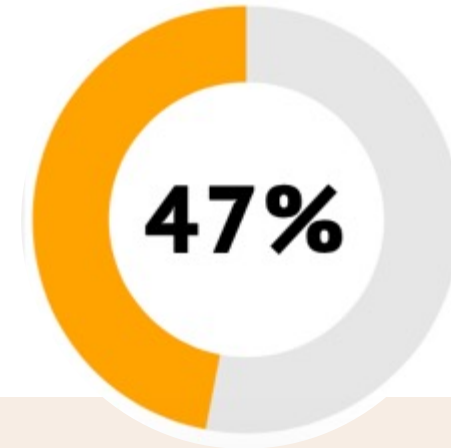
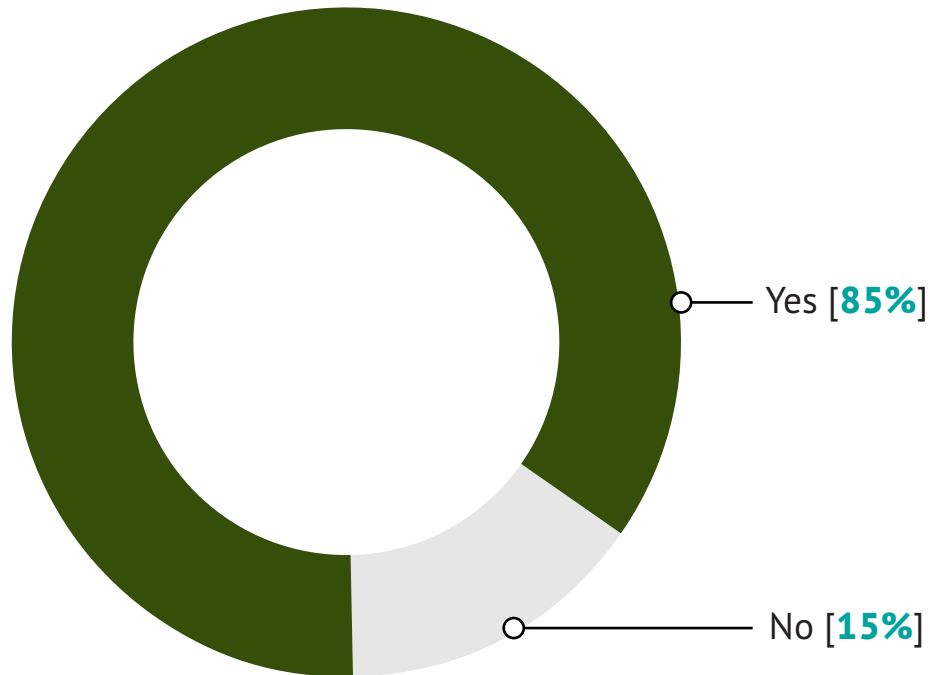
Snacks



**#2: The Whole Grain Stamp is  
a powerful marketing tool and  
a trusted source of whole  
grain information**

# 85% of consumers say they trust the Whole Grain Stamp.

Percentage of consumers who trust the Whole Grain Stamp to accurately state whole grain content



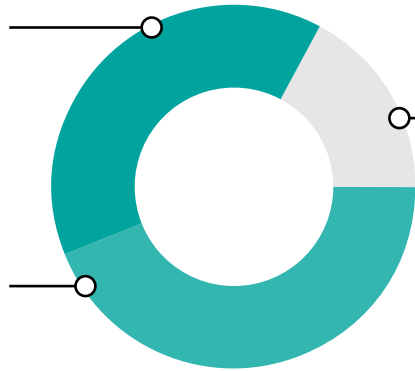
of consumers think using the [Whole Grain Stamp](#) is one of the best ways to [encourage more](#) whole grain consumption.

# Four out of five consumers would use the Whole Grain Stamp as part of their purchasing decisions.

## Consumer likeliness to purchase a product with the Whole Grain Stamp

Yes, seeing the Whole Grain Stamp would make me more likely to buy a product [39%]

Yes, but I would also consider other factors (sugar, sodium, etc.) [44%]

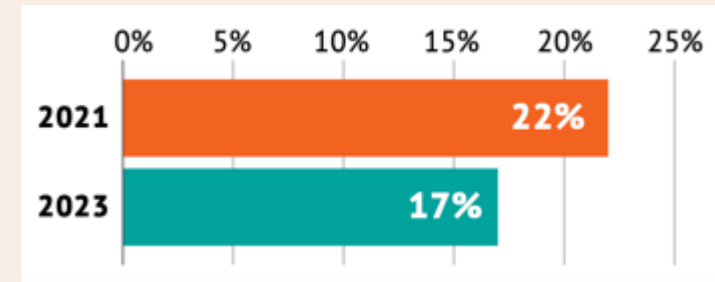


No, seeing the Whole Grain Stamp would not sway my purchasing decision [17%]

This year, significantly **more** people say the Stamp would make them **more likely** to buy a product (with just over half also considering other factors).

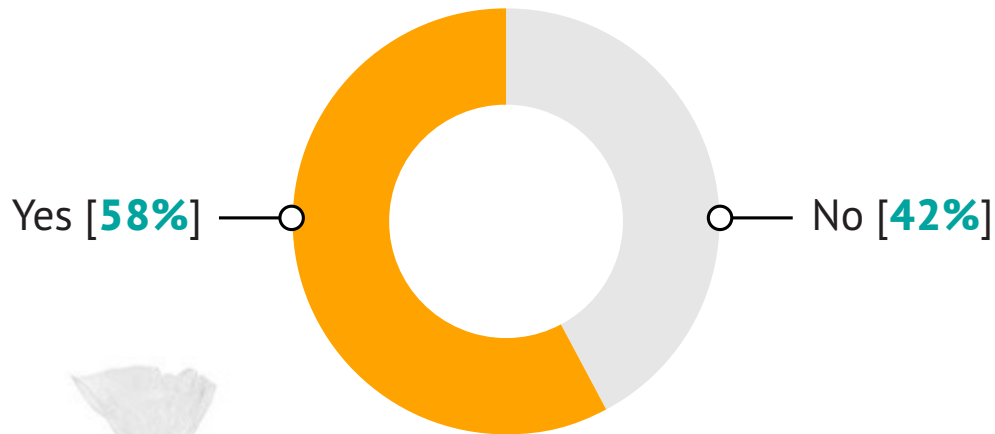


Significantly **fewer** people say the Stamp **would not impact** their purchasing decision.

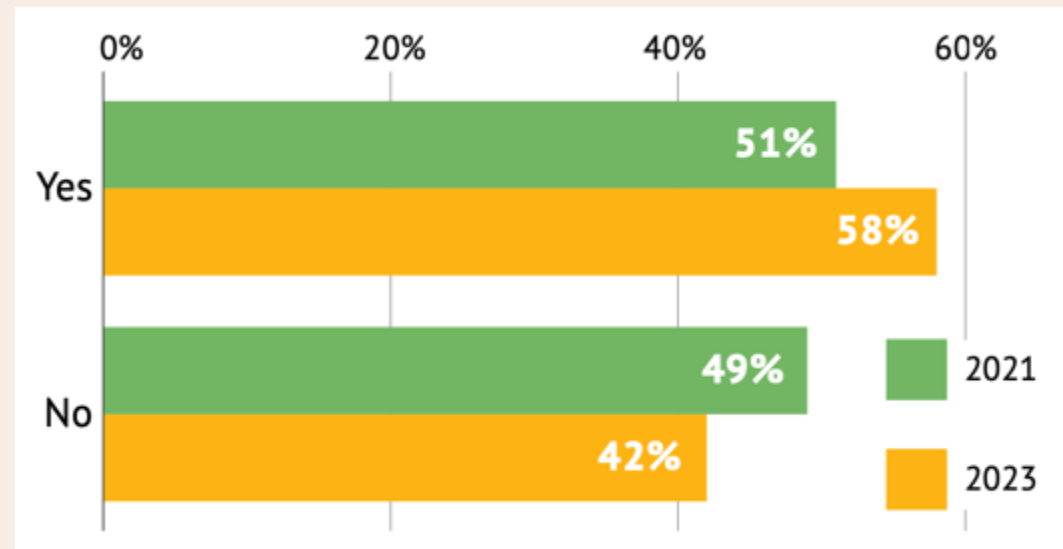


# If a product does not use the Whole Grain Stamp, **more than half** of consumers would be **skeptical** of its whole grain claims.

Percentage of consumers who would question whole grain claims on products without the Stamp

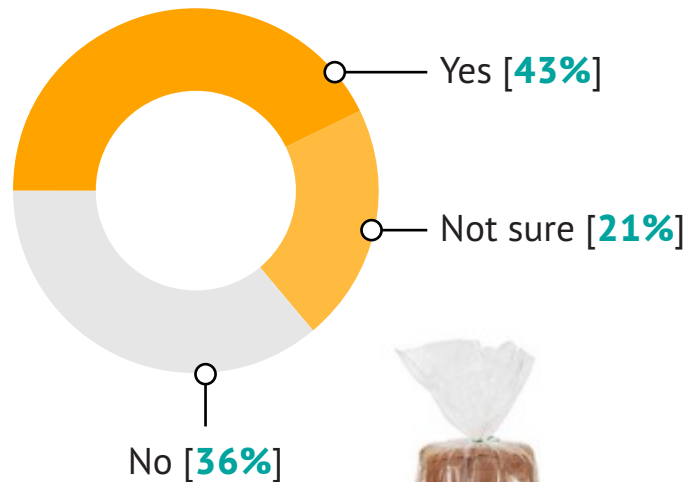


Compared to 2021, **even more** consumers would **question** a product's whole grain claims without the Stamp.

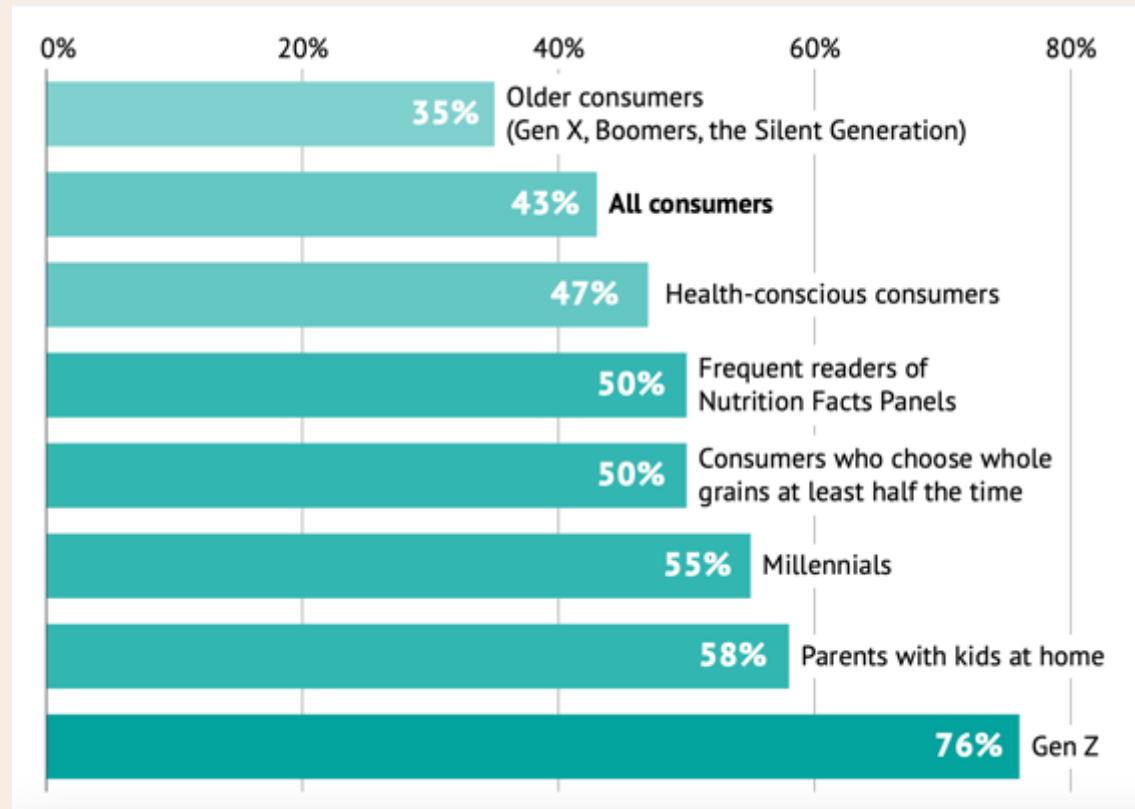


# Close to half of all consumers recognize the Whole Grain Stamp, and three quarters of Gen Z consumers recognize it.

Percentage of consumers who have seen the Whole Grain Stamp on packaging



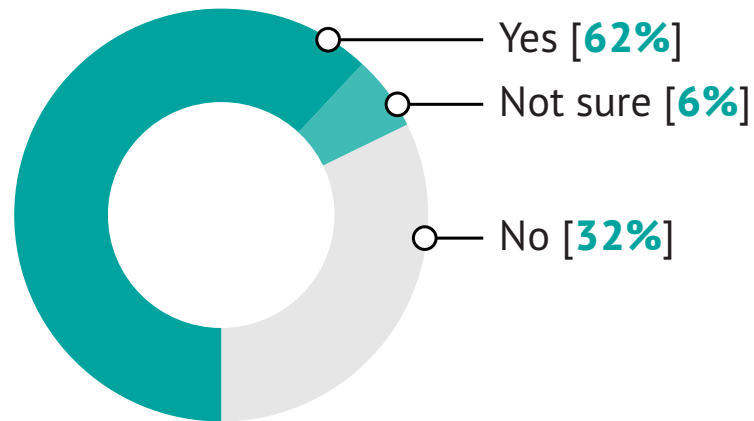
While older consumers don't recognize the Stamp as often, other demographic groups are much more likely to have seen it:



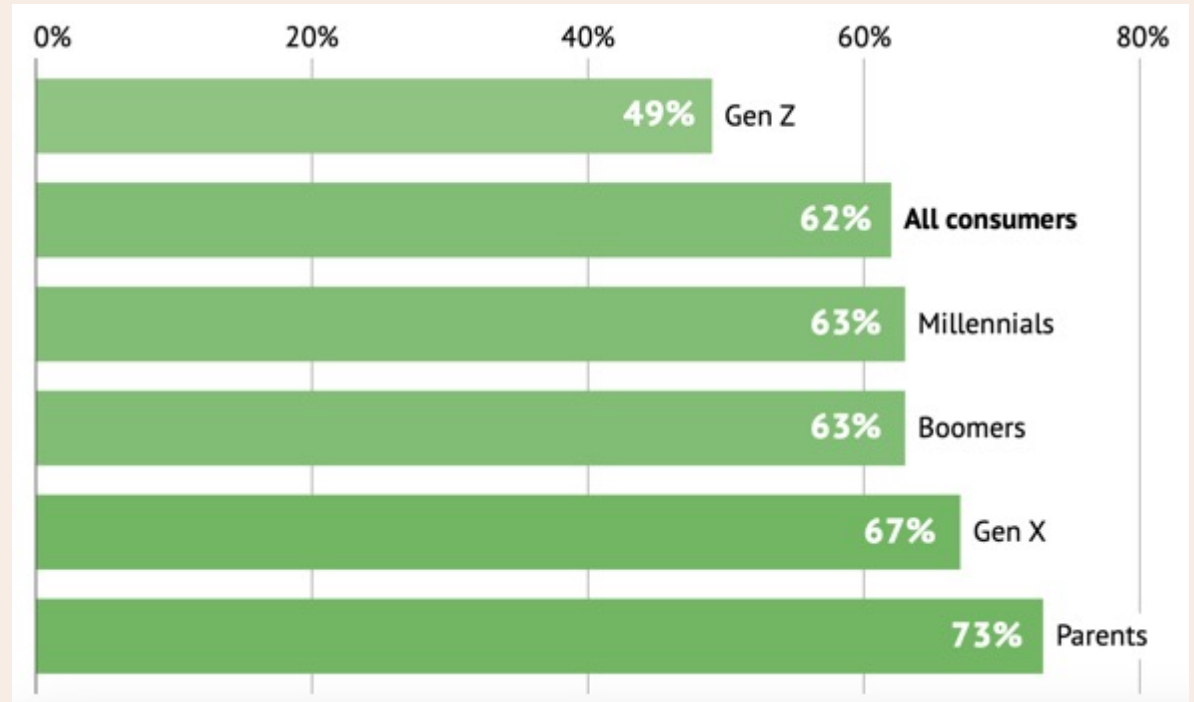


# Over half of the consumers who recognize the Whole Grain Stamp look for it when shopping.

Percentage of consumers who have seen the Whole Grain Stamp *and* look for it when choosing products

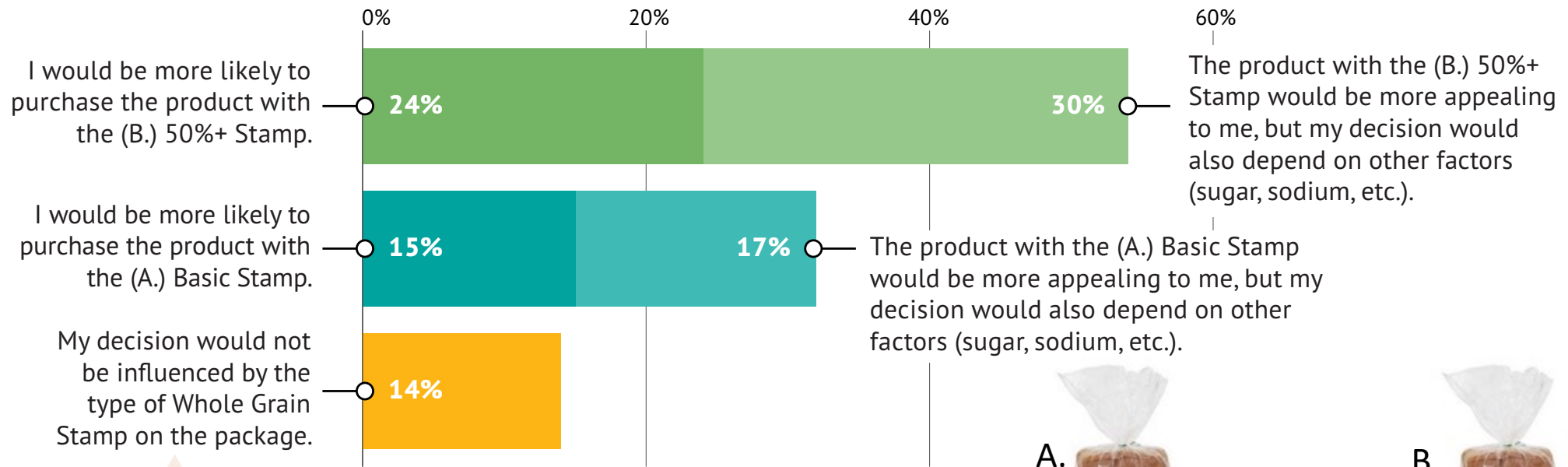


Interestingly, although the vast majority of Gen Z consumers recognize the Stamp, they are less likely to use it when choosing products. However, Millennials, Boomers, Gen X, and parents are more likely to use it.



# 55% of consumers would be more likely to purchase a product bearing the 50%+ Stamp than a product bearing the Basic Stamp.

## Consumer likeliness to purchase a product with the 50%+ Stamp versus the Basic Stamp



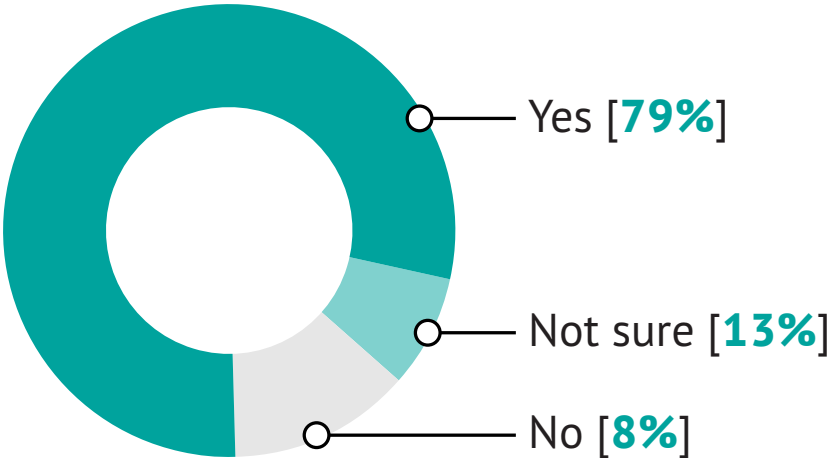
This year, significantly fewer people said their decision would not be influenced by the type of Stamp on the package. [2021: 19%, 2023: 14%]



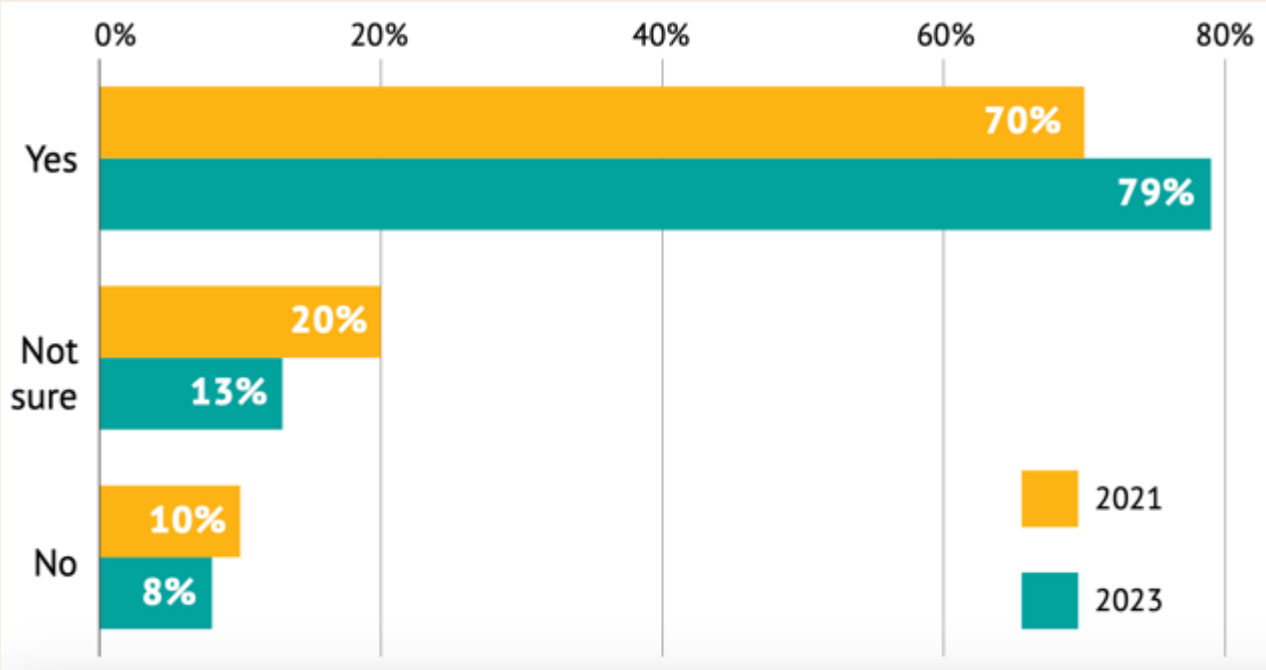
**#3: Consumers want to know  
the whole grain content of  
their foods and they feel more  
confident when they see  
third-party certifications**

# A significant majority of consumers want the whole grain content of products to be included on the packaging.

Consumer interest in seeing whole grain content displayed on packaging

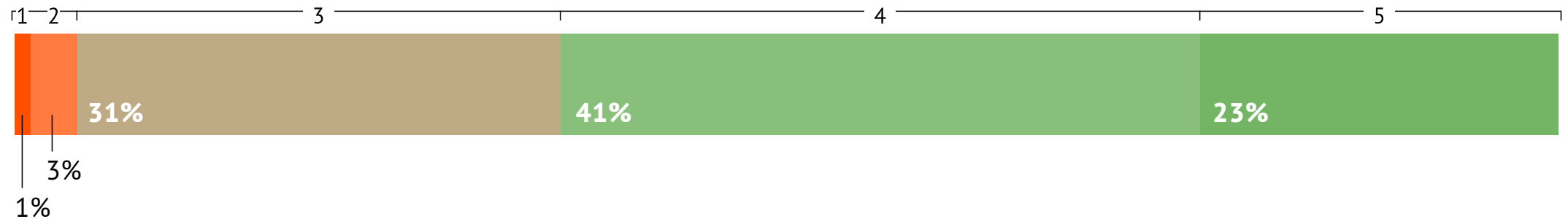


Compared to 2021, even more consumers want whole grain content included, and fewer don't want it included or aren't sure.



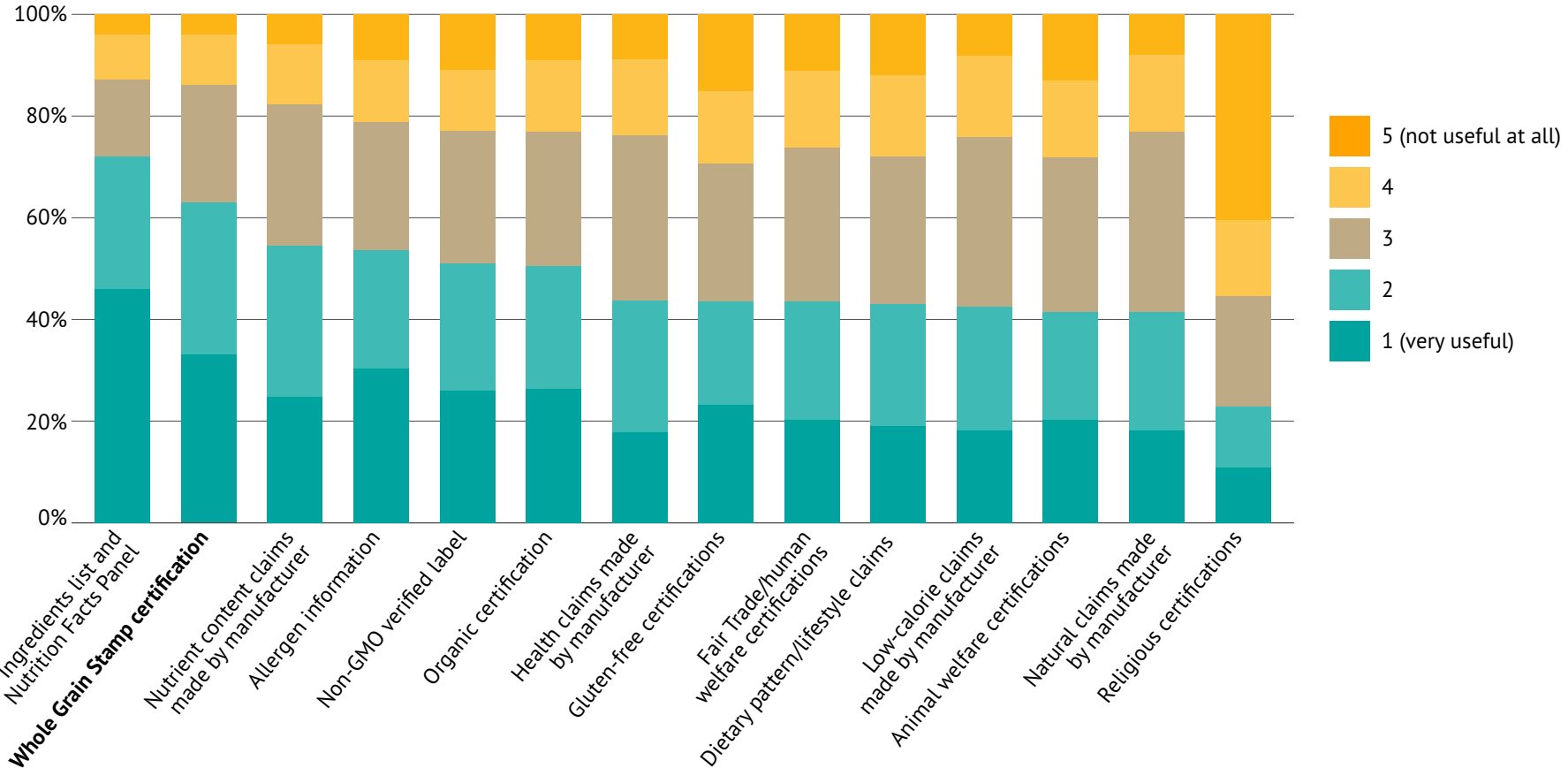
# About **two thirds** of consumers say packaging symbols like the Whole Grain Stamp give them **more confidence** in the product they're buying.

Consumer confidence in products with independent, third-party food packaging symbols  
Ranked on a scale of 1 (Much less confidence) to 5 (Much more confidence)



# After the Nutrition Facts Panel, the **Whole Grain Stamp** is the **second most highly rated** packaging label in terms of usefulness.

Usefulness of a product's packaging information in consumer decision-making  
Ranked on a scale of 1 (Very useful) to 5 (Not useful at all)

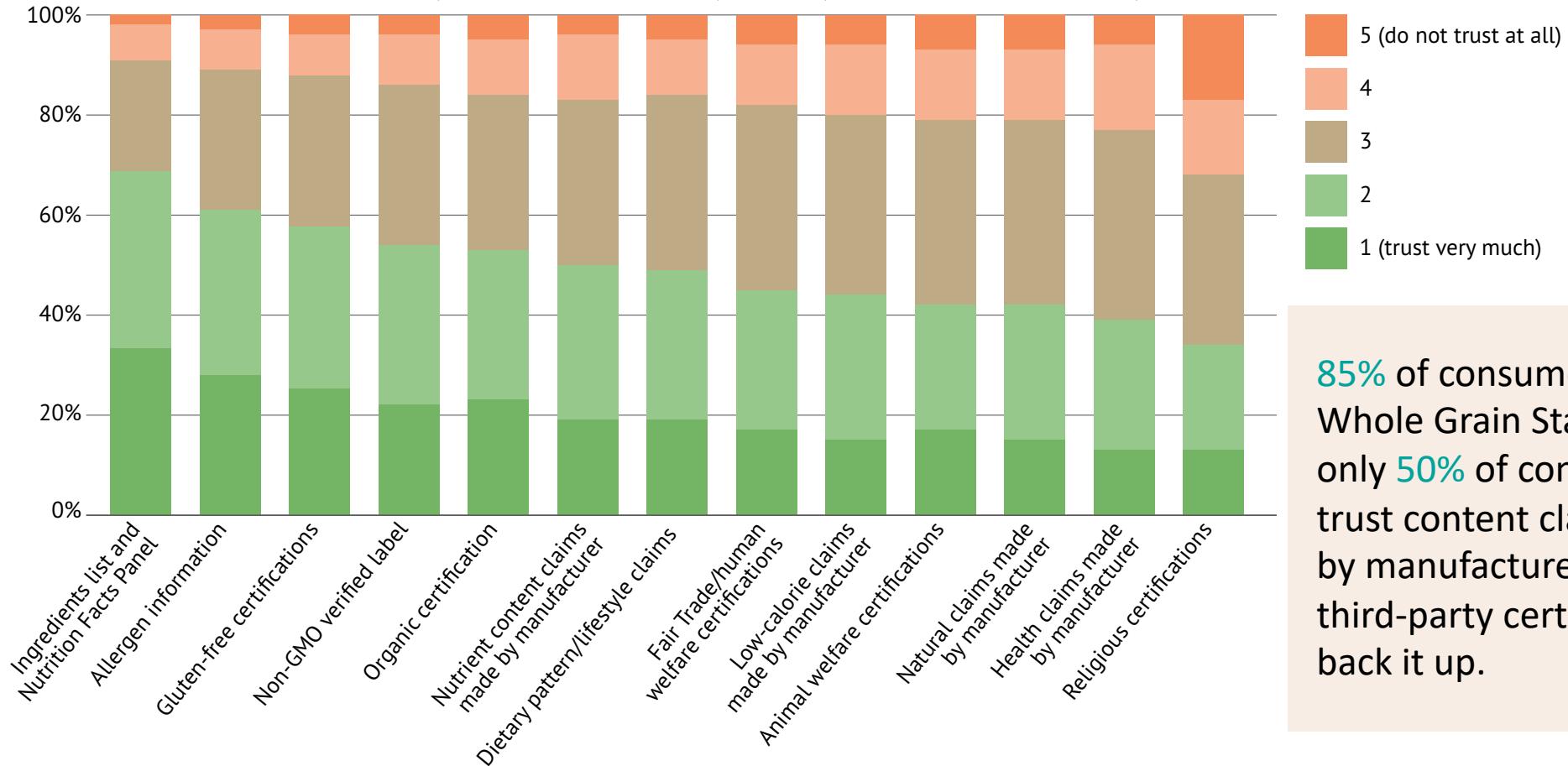




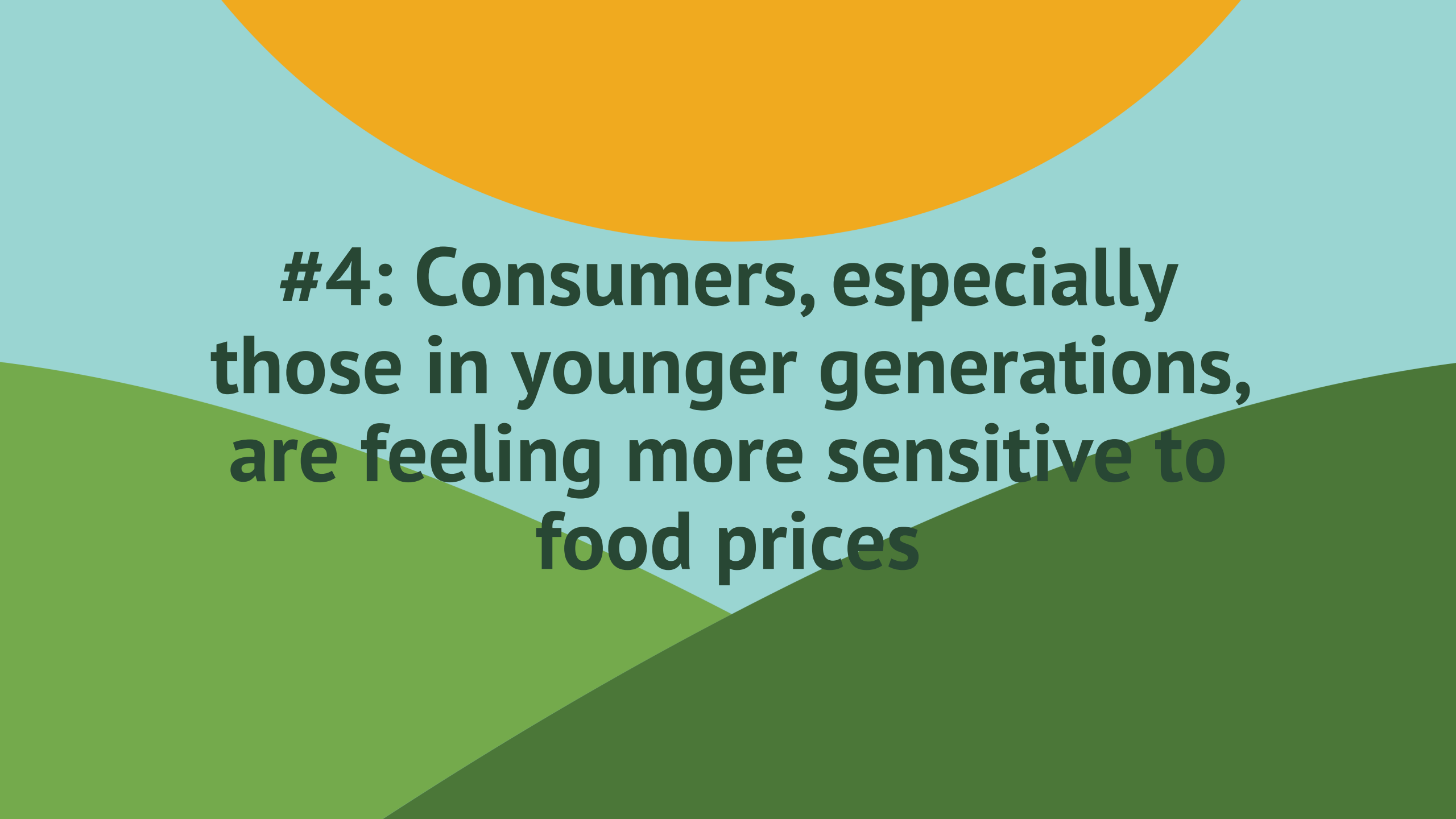
# Most consumers **trust** the ingredients list, Nutrition Facts Panel, allergen information, and gluten-free certifications, among others.

## Trustworthiness of a product's packaging information

Ranked on a scale of 1 (Trust very much) to 5 (Do not trust at all)



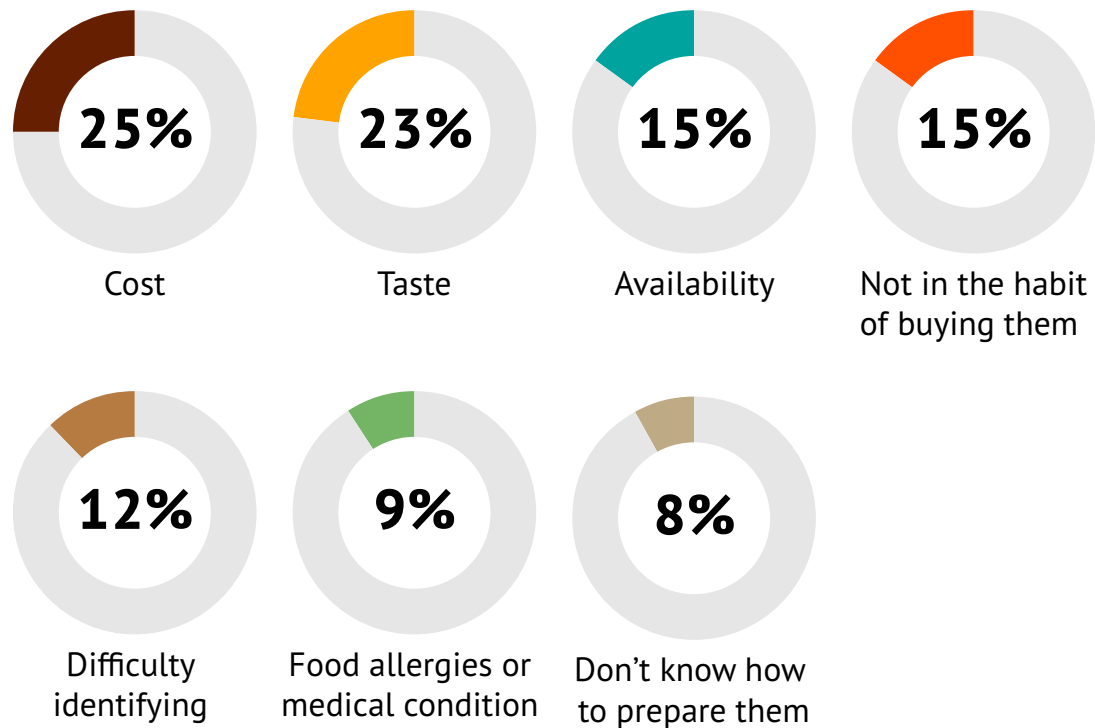
85% of consumers trust the Whole Grain Stamp, but only 50% of consumers trust content claims made by manufacturers without third-party certification to back it up.



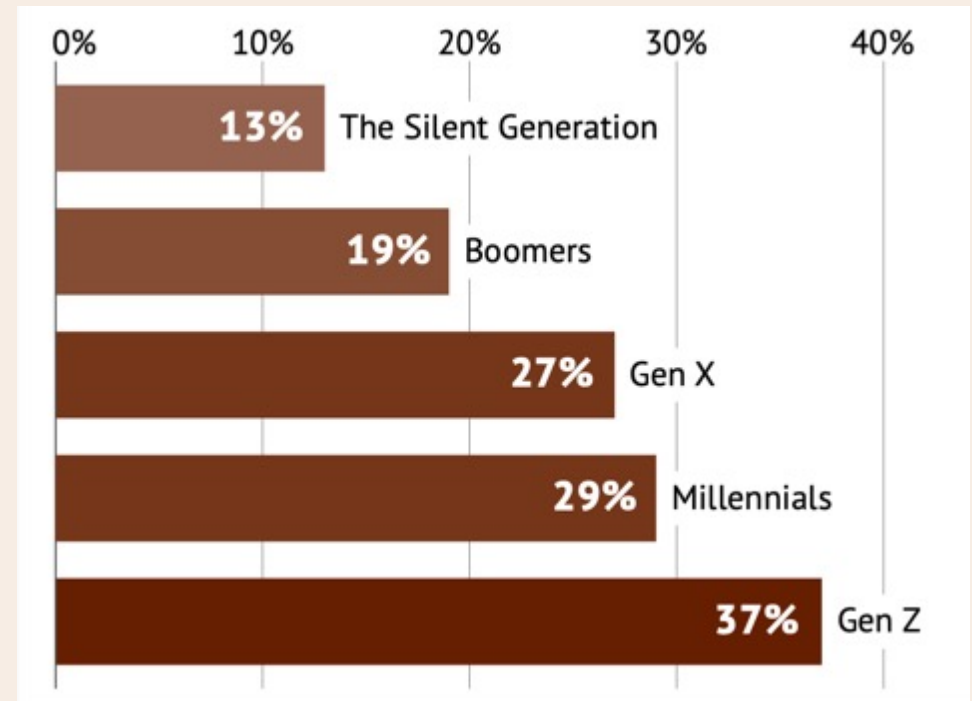
**#4: Consumers, especially those in younger generations, are feeling more sensitive to food prices**

# Cost is the most significant barrier to eating more whole grains, especially for younger generations.

## Significant barriers to increasing whole grain intake

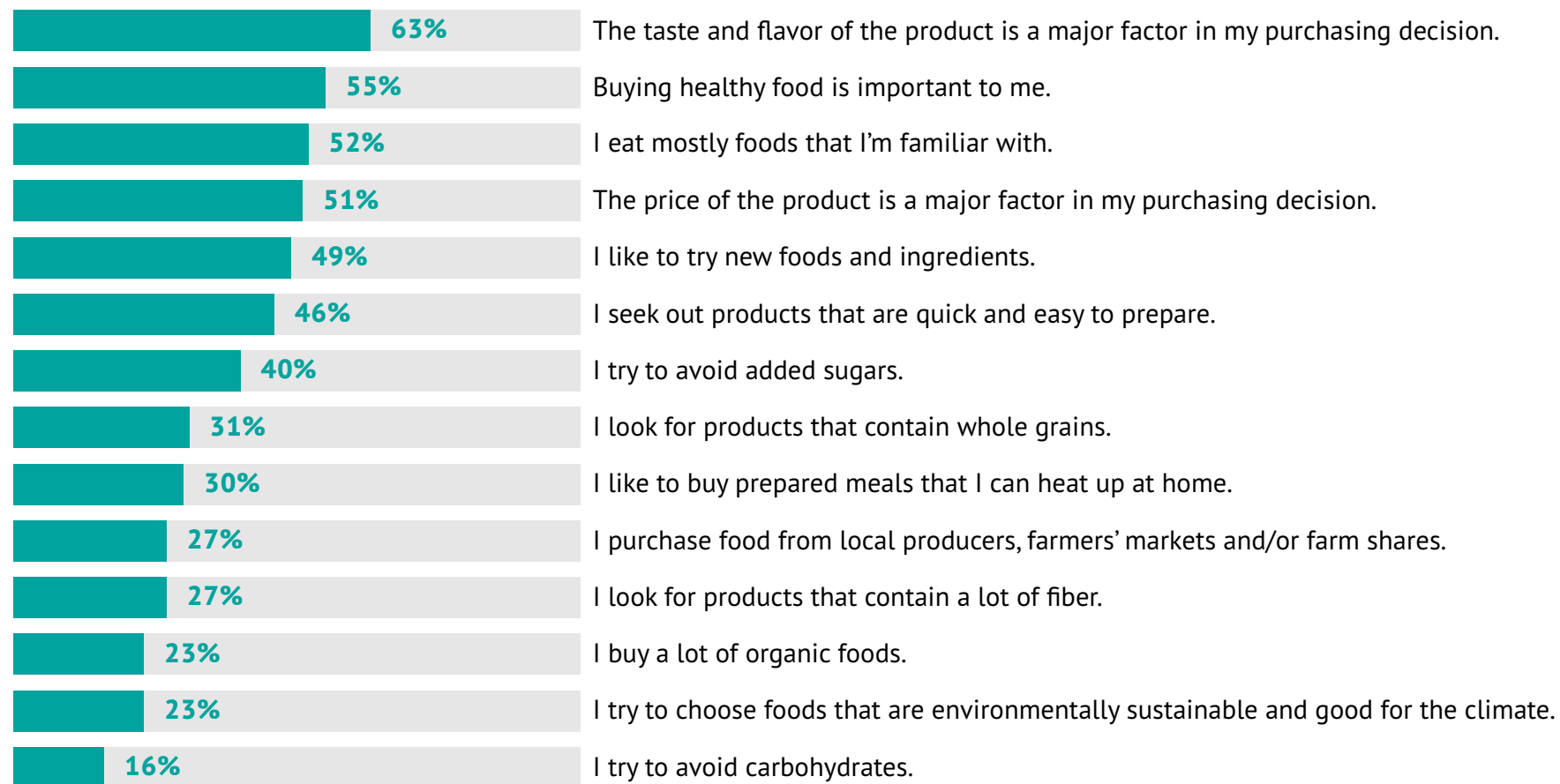


## Cost ranked as a significant barrier by different age groups



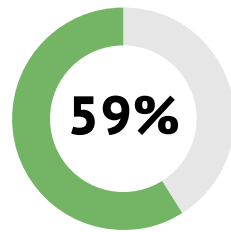
# Top influences on purchasing decisions include **flavor, health, familiarity, price, and a desire to try new foods.**

## Consumer Purchasing Decisions

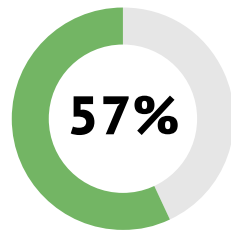


# Consumers believe **reducing cost, increasing variety/availability, and providing education** are the best ways to promote whole grains.

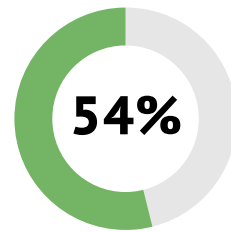
## Consumer beliefs about strategies to encourage more whole grain consumption



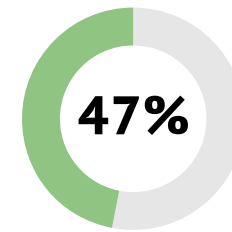
Reduce the cost of whole grain options



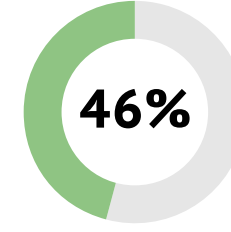
Increase variety and availability of whole grain products at supermarkets



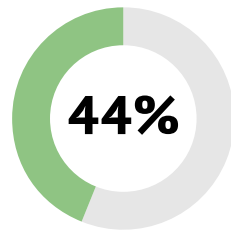
Provide more education about the benefits of whole grains



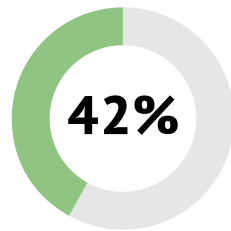
Clearly label whole grain foods (e.g. with the Whole Grain Stamp)



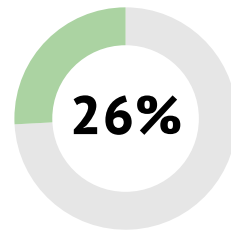
Encourage more restaurants to serve whole grains



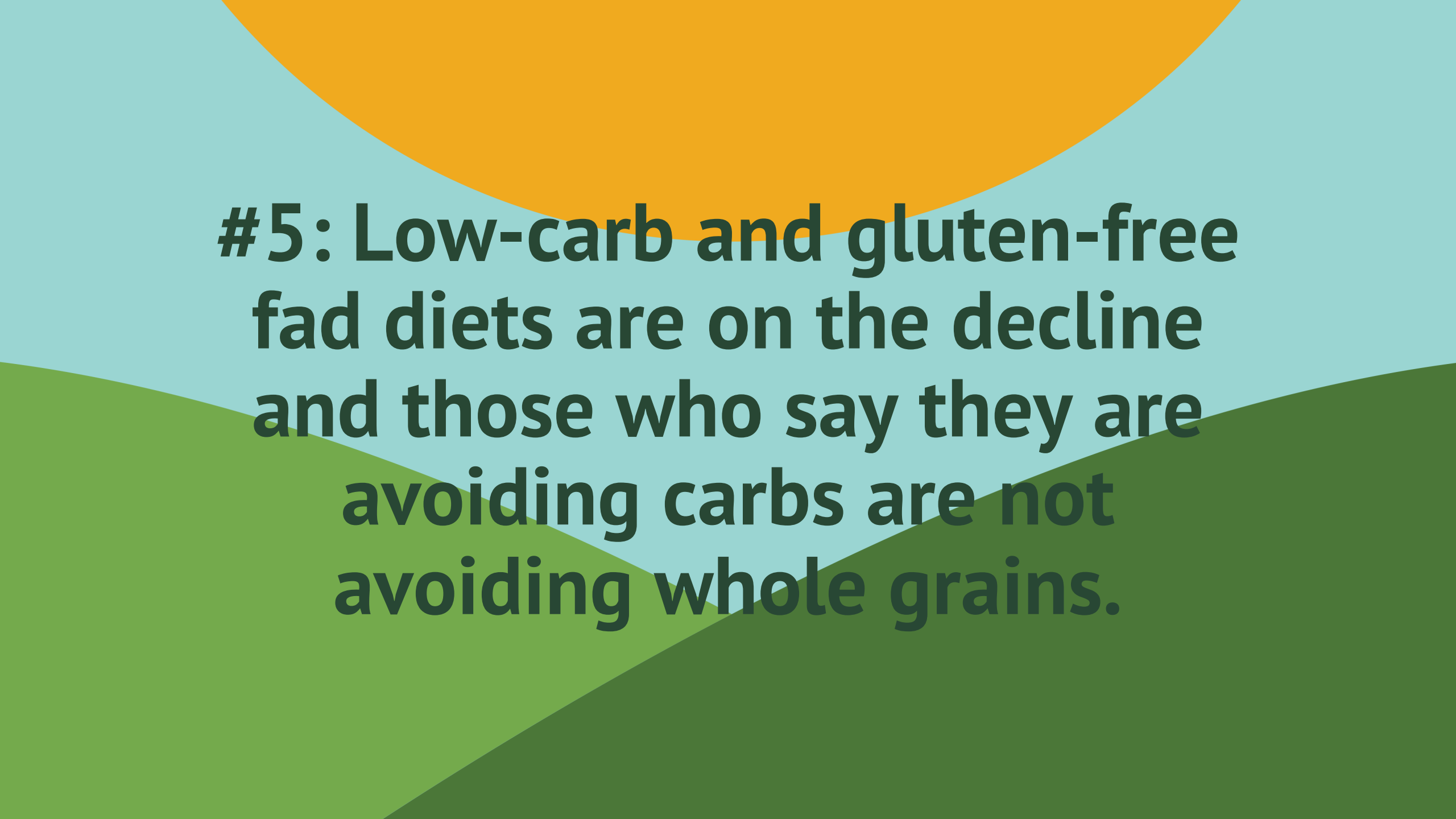
Encourage parents to offer children whole grains from a very young age



Increase the quantity of whole grains served to children in schools



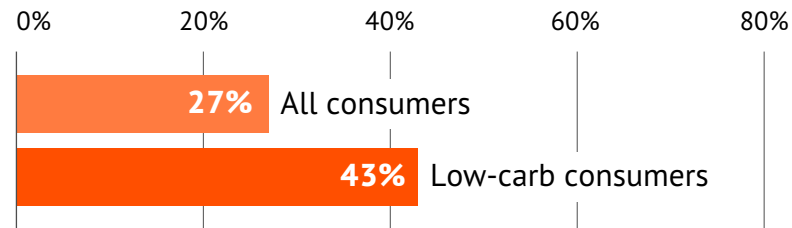
Encourage hospitals to offer more whole grain options to their patients



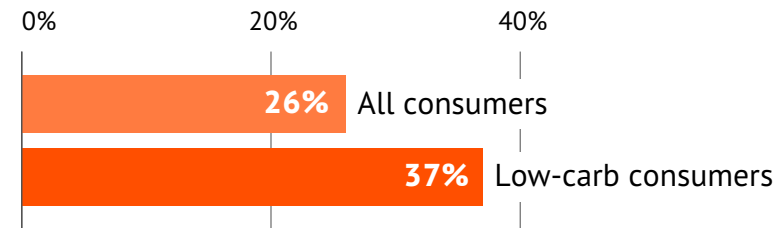
**#5: Low-carb and gluten-free fad diets are on the decline and those who say they are avoiding carbs are not avoiding whole grains.**

# While we often assume that **low-carb dieters** have lower whole grain consumption, those who said they avoid carbs are **more likely** to:

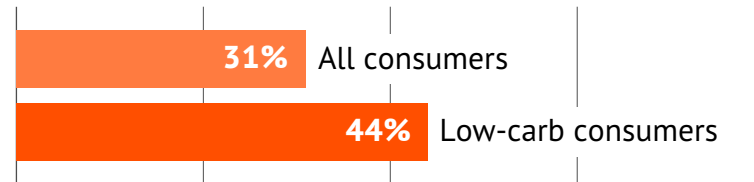
**Look for high-fiber foods when shopping (Q2)**



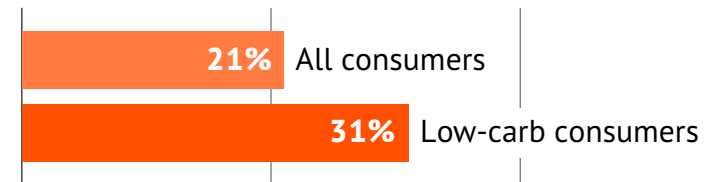
**Nearly always choose to eat whole grains (Q6)**



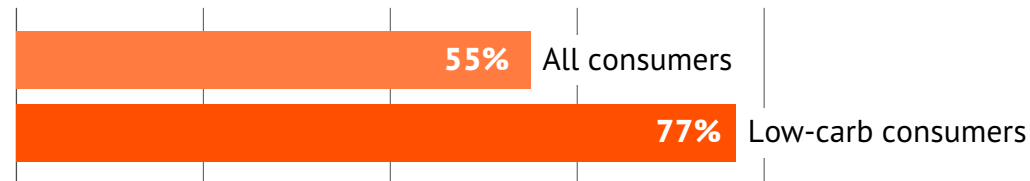
**Look for whole grains when shopping (Q2)**



**Have increased their whole grain intake a great deal in the last five years (Q7)**



**Say that healthy food is important to them (Q2)**

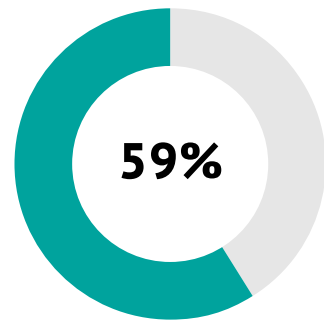




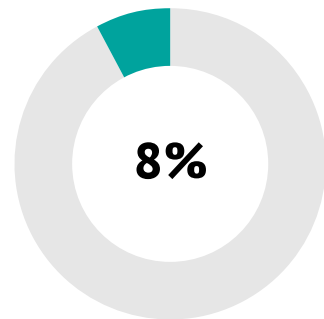
# Over half of American consumers have **some** idea what **gluten is**—but few can fully define it correctly.

In the survey, there were two correct answers to the question “What is gluten?”

1. It’s a protein found in wheat, barley, and rye.
2. It helps bread dough stretch and rise.



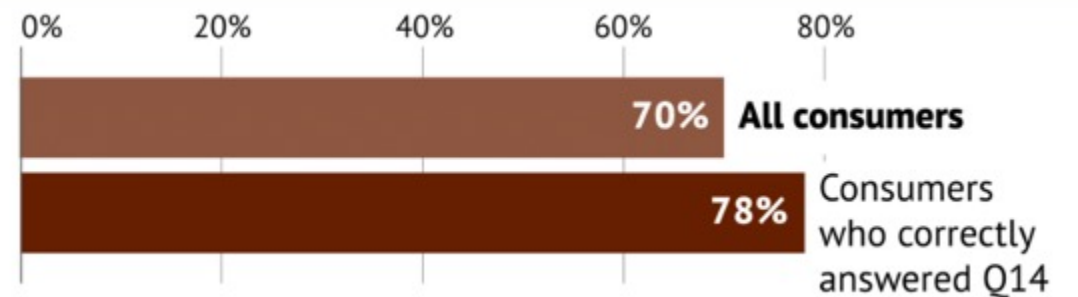
of consumers selected **one** of the correct answers



of consumers selected **both** correct answers

(and didn’t select any additional answers)

The eight percent who fully answered this question correctly (indicating that they know what gluten is) are more likely to report that they do *not* avoid gluten.



The eight percent who answered correctly are also much more likely to have a college or graduate degree.

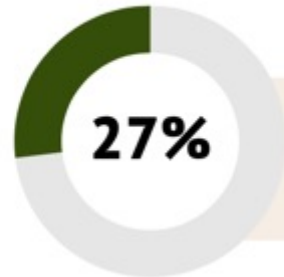
- **64%** have a college or graduate degree [compared with 51% in the general pool of respondents]

# This year, significantly more consumers correctly identified that **gluten helps dough stretch and rise**.

## Consumers' definitions of gluten

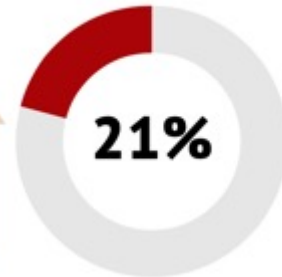


A protein found in wheat, barley, and rye

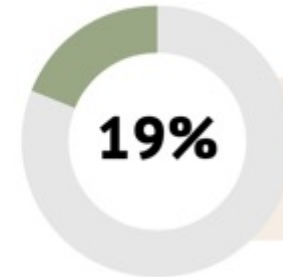


It helps bread dough stretch and rise

23%  
in 2021



Something found in all grains

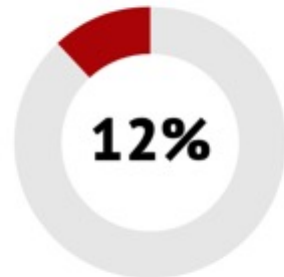


Don't know

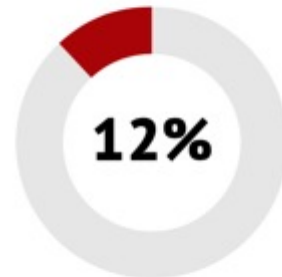
22%  
in 2021



Those who avoid carbs are more likely to believe that gluten is unhealthy [22%].



An unhealthy carbohydrate



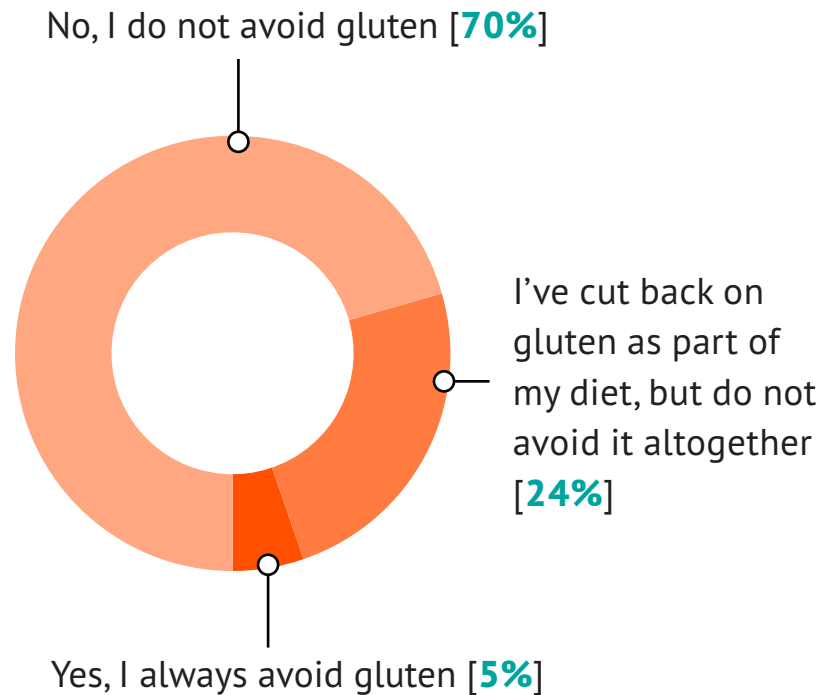
An unnatural substance found in GMO grains



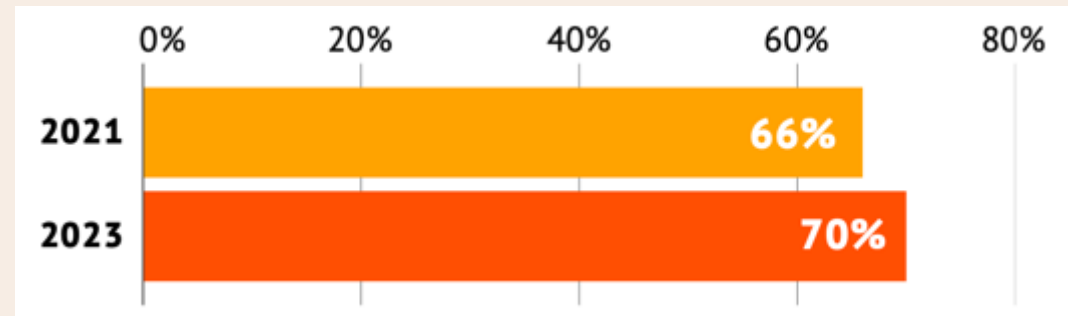
A substance that makes you gain weight

# Overall, **fewer** people are **avoiding** gluten compared to 2021. **94%** of consumers eat gluten some or all of the time.

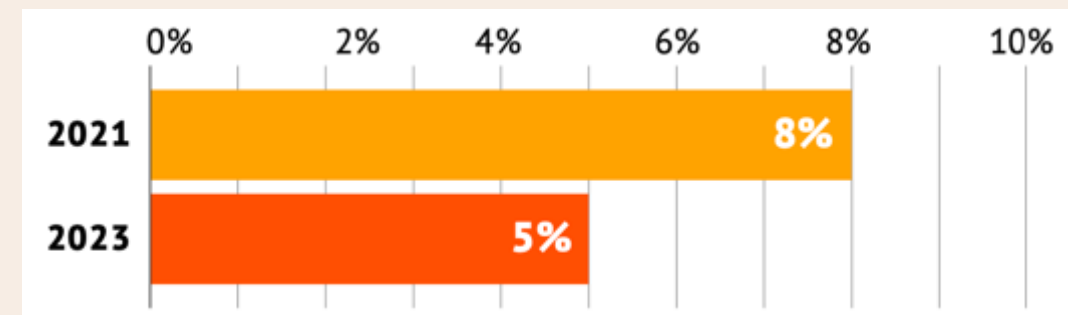
## Gluten avoidance among consumers



Significantly **more** people say they **do not avoid** gluten,

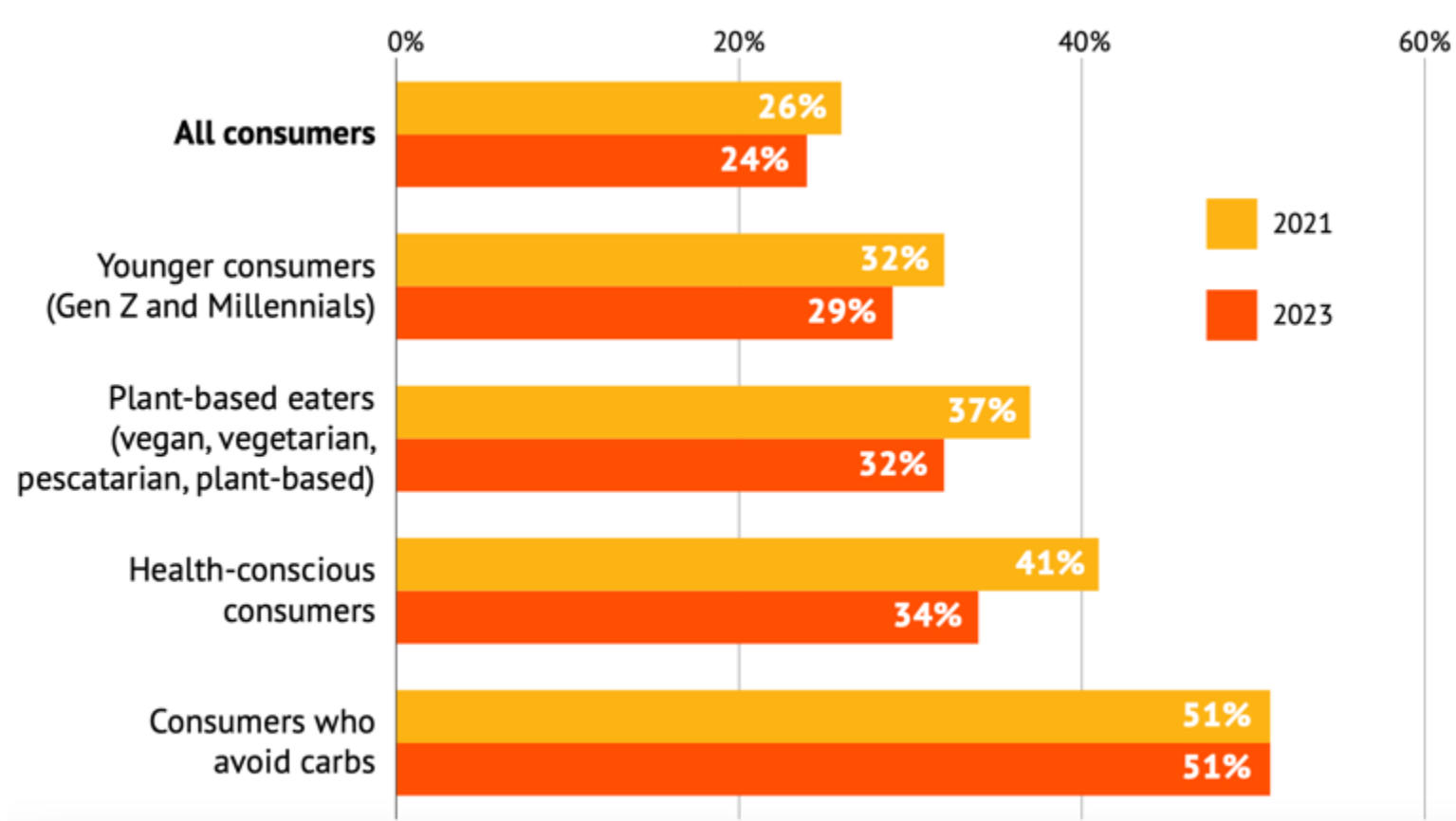


and **fewer** people say they **always avoid** gluten.



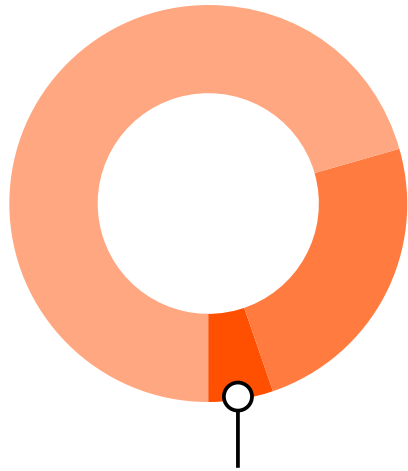
# About a quarter of consumers have cut back on gluten but are not following a true gluten-free diet.

Demographic groups who report cutting back on gluten, 2021 and 2023



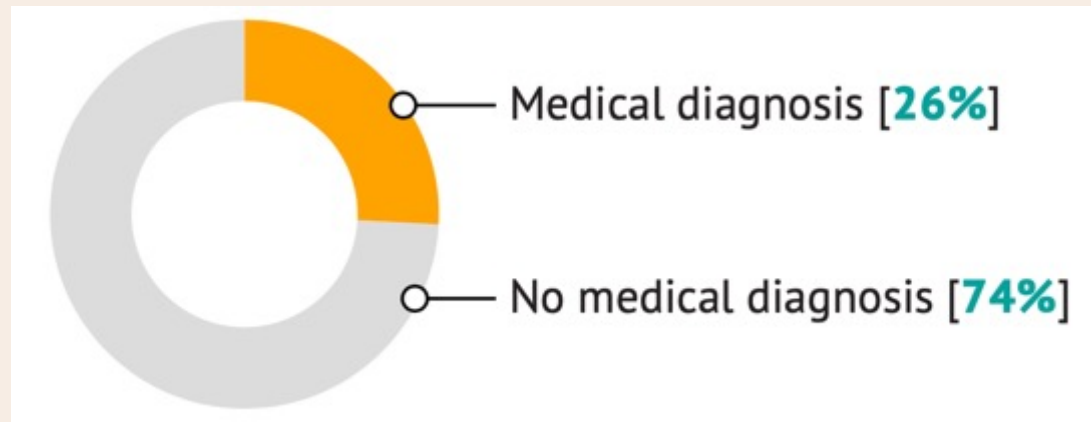
Note: People with a medically-diagnosed gluten problem (such as celiac disease) must avoid even the smallest crumb of gluten-containing foods for a gluten-free diet to be effective.

# Three out of four consumers who always avoid gluten are doing so **without a medical diagnosis.**



Yes, I always avoid gluten

Among the five percent who always avoid gluten, only about **a quarter** have been medically diagnosed with a gluten problem.



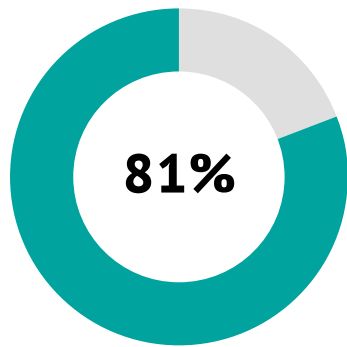
- The medically diagnosed respondents make up **1.33%** of all respondents, which lines up with the estimated prevalence of celiac disease in the general population.



**#6: Millennials lead the way when it comes to choosing whole grains for sustainability.**

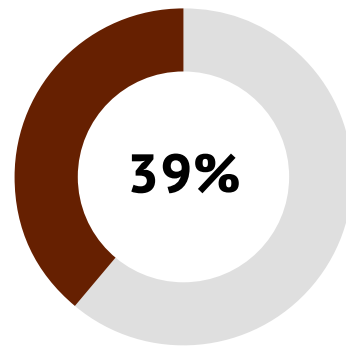
# Health is still the leading reason for choosing whole grains, but it's not the only one.

## Reasons consumers choose whole grains



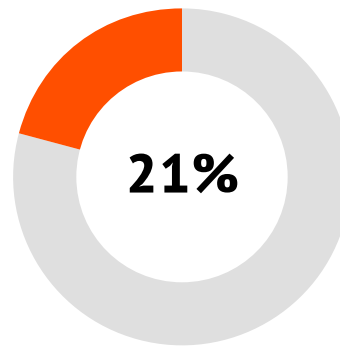
Health

84% of older consumers and 89% of health-conscious consumers choose whole grains for health reasons.



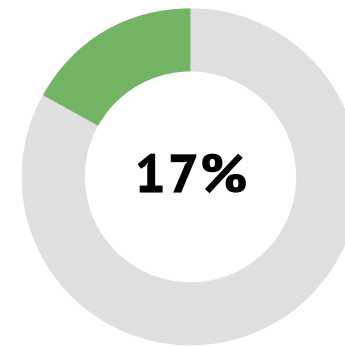
Taste

44% of Millennial consumers choose whole grains for their taste.



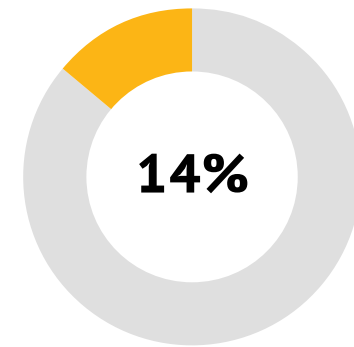
Habit

28% of parents of young children (age 0-12) choose whole grains out of habit.



Sustainability

24% of Millennial consumers choose whole grains for sustainability.

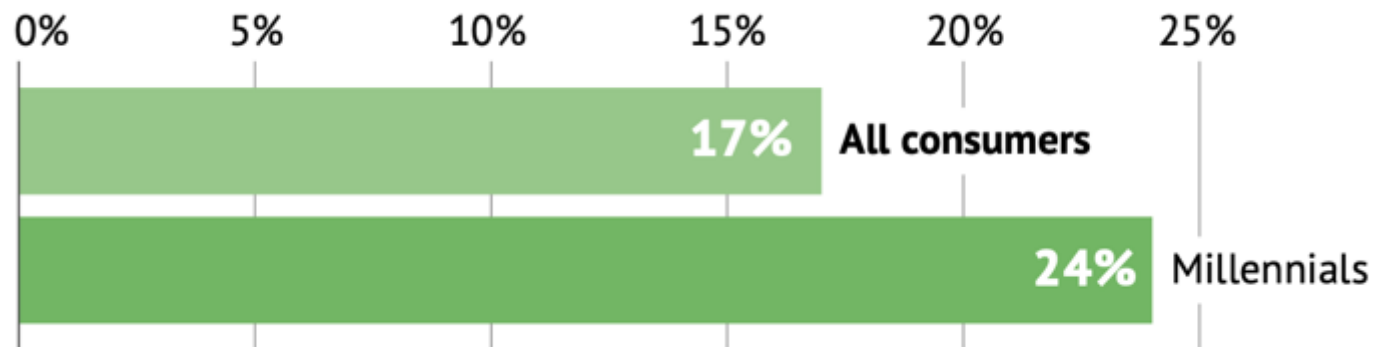


Cost

Significantly more consumers cite cost as a reason to choose whole grains compared to 2021 [11%].

# Sustainability is increasingly a motivation for choosing whole grains, especially for Millennials.

## Sustainability as a motivation for choosing whole grains

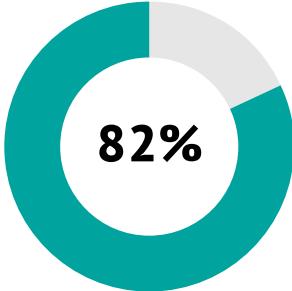


Compared to all consumers, Millennials are also more likely to choose foods that are **environmentally sustainable** and good for the climate [27%, compared with 23% of all consumers], and they are more likely to buy **organic food** [32%, compared with 23% of all consumers].

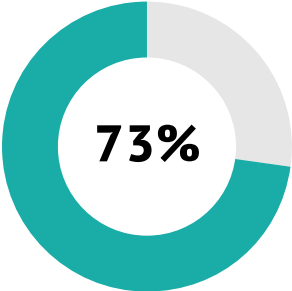


# Two thirds of consumers consider whole grains to be sustainable and environmentally friendly.

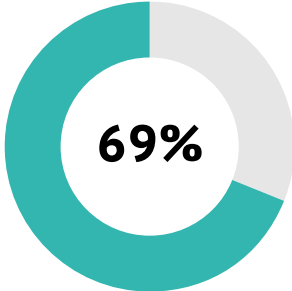
Foods perceived by consumers as sustainable and environmentally friendly



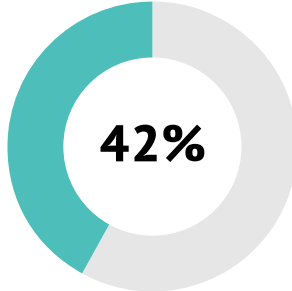
Fruits and vegetables



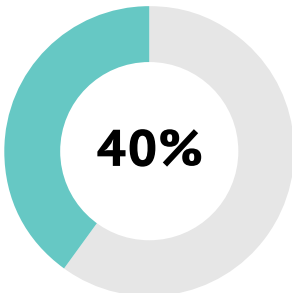
Nuts, seeds, and legumes  
(beans & lentils)



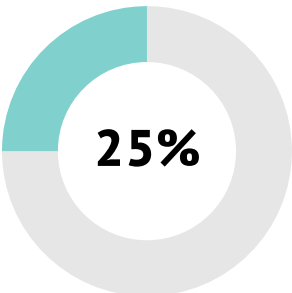
Whole grains



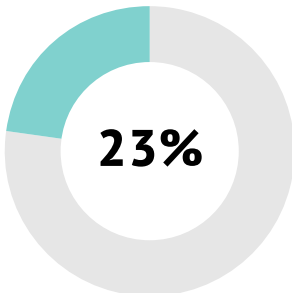
Eggs and dairy



Fish



Poultry

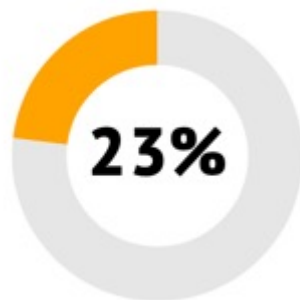


Red meats  
(beef, pork, lamb, etc.)



# **#7: Other takeaways from our survey results**

Although **taste** is ranked as a significant **barrier** to eating more whole grains, more consumers consider the taste to be a **benefit**.



of consumers say the taste of whole grains is **a barrier**

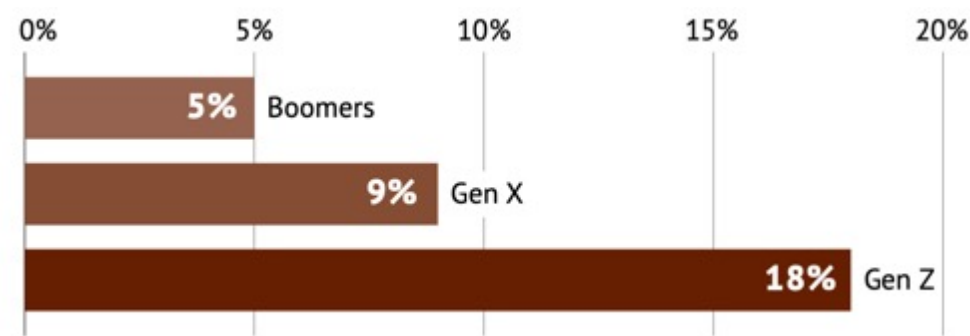


of consumers say the taste of whole grains is **a benefit**

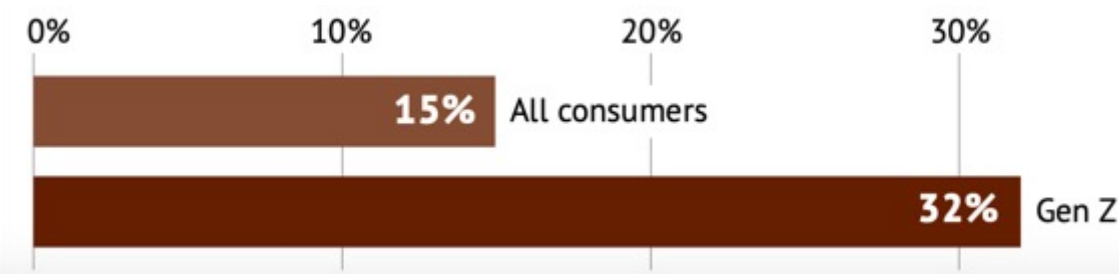
Of those who say they nearly always choose whole grains, **45%** see taste as a benefit and only **18%** see it as a barrier, suggesting that the more exposure you have to whole grains, the more you come to appreciate the nuttier, more robust flavors.

For **Gen Z**, not knowing how to **prepare whole grains** and not being in the **habit of buying** them are particularly significant barriers.

**Not knowing how to prepare whole grains ranked as a significant barrier by different age groups**

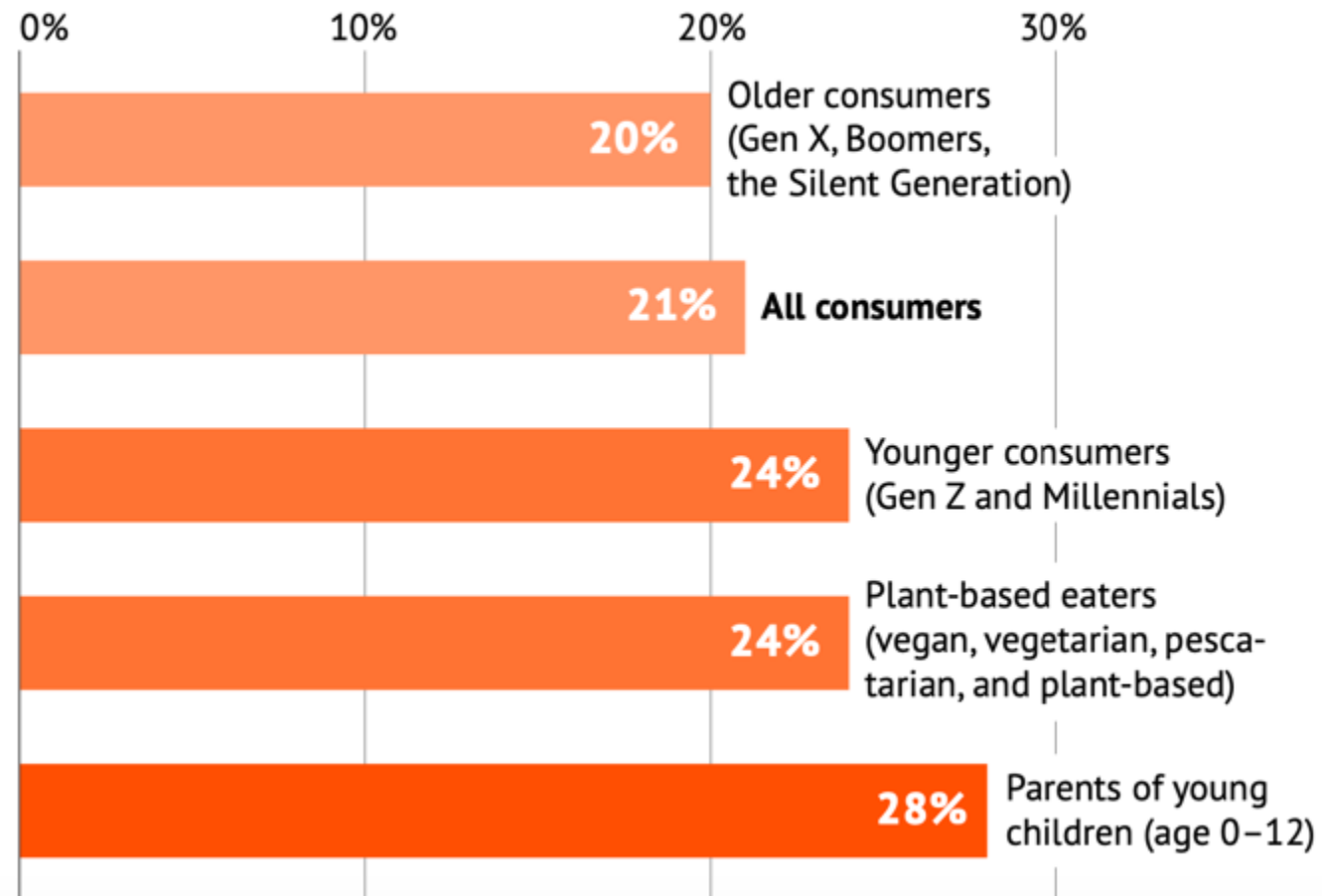


**Not being in the habit of buying whole grains ranked as a significant barrier by different age groups**



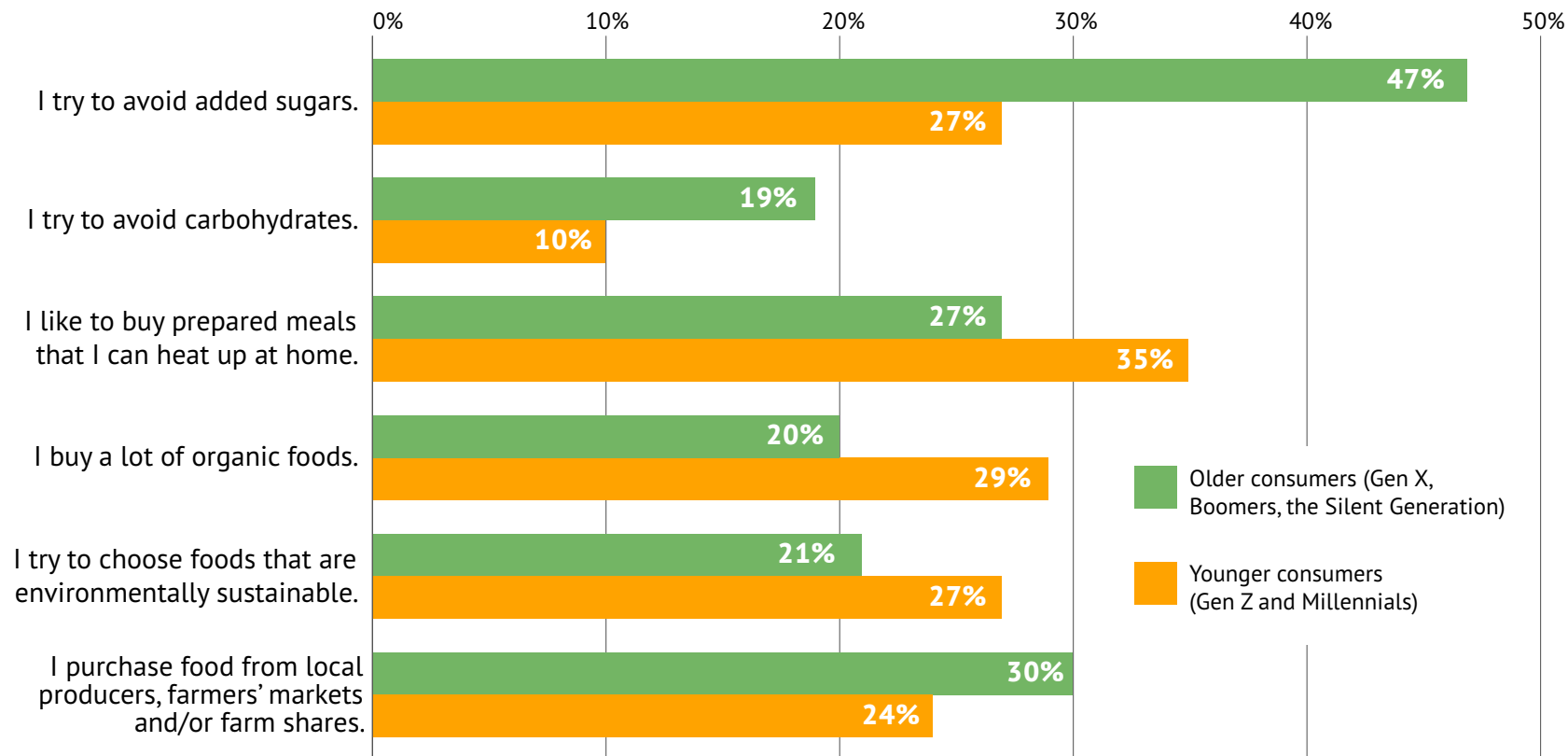
# Young consumers, parents of young children, and plant-based eaters are more often in the habit of choosing whole grains.

Percentage of households by demographic group in the habit of purchasing whole grain foods



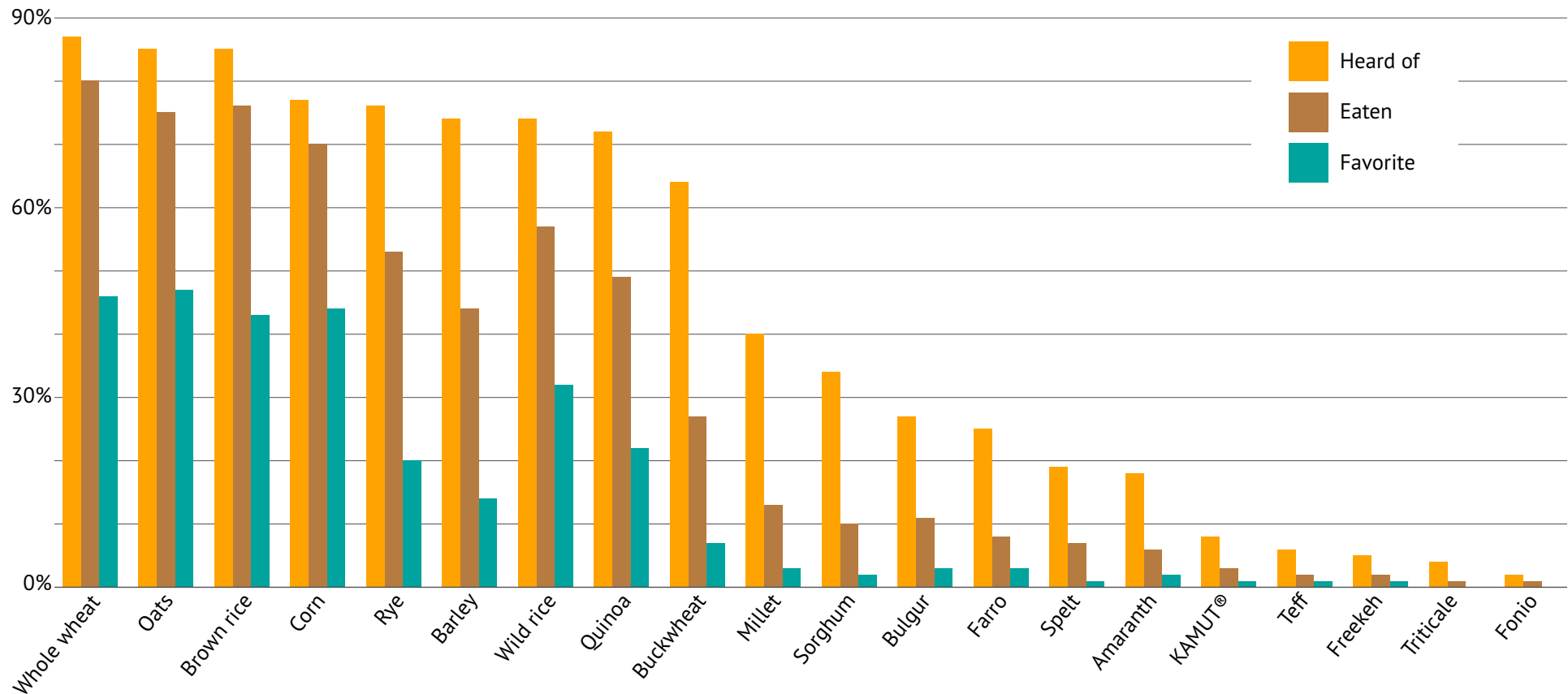
# Older consumers are more likely than younger consumers to avoid carbohydrates, added sugar, and prepared meals when shopping.

Comparing purchasing decisions, younger versus older consumers



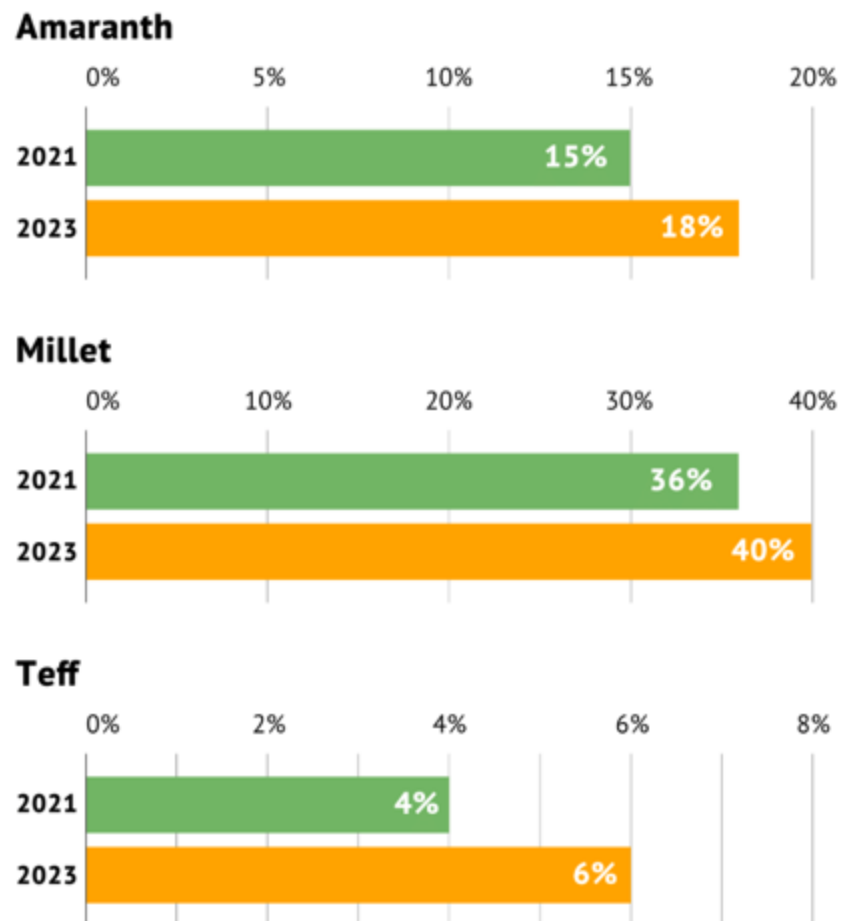
# Whole wheat, oats, and brown rice are the most well-known grains overall. Quinoa is the most well-known “ancient grain.”

Percentage of consumers selecting each grain they've heard of, eaten, and consider a favorite



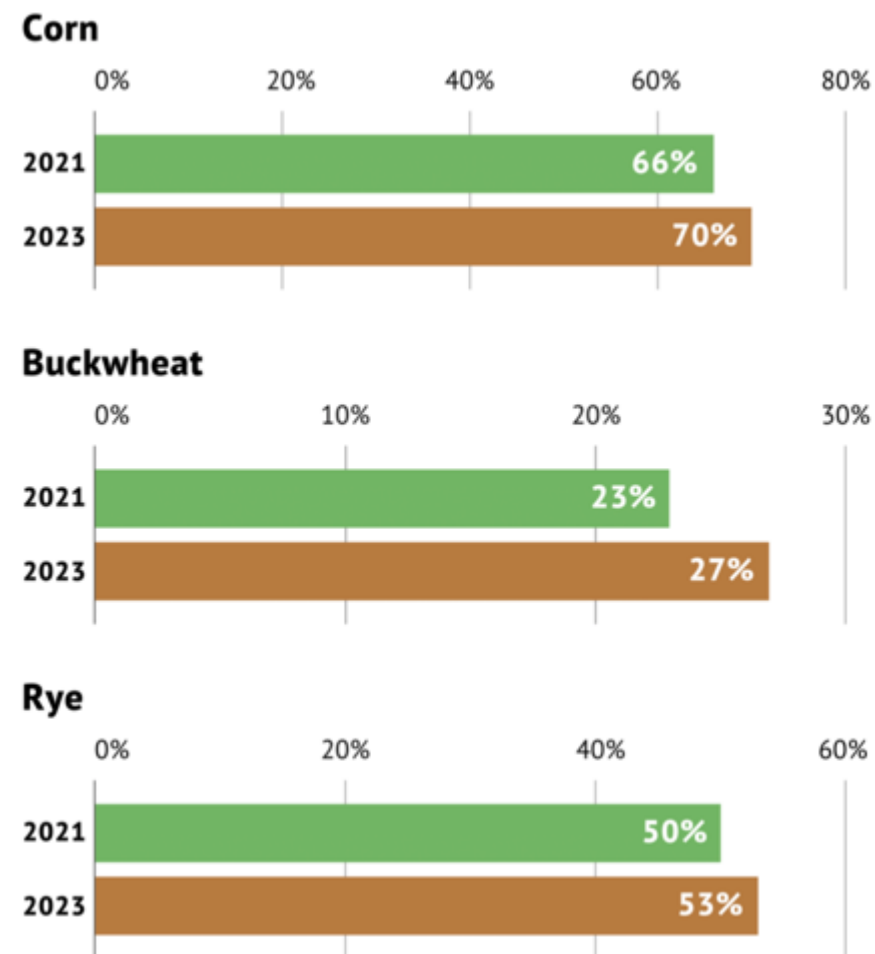
This year, significantly more people have heard of **amaranth**, **millet**, and **teff**.

Grains that consumers have heard of, 2021 and 2023



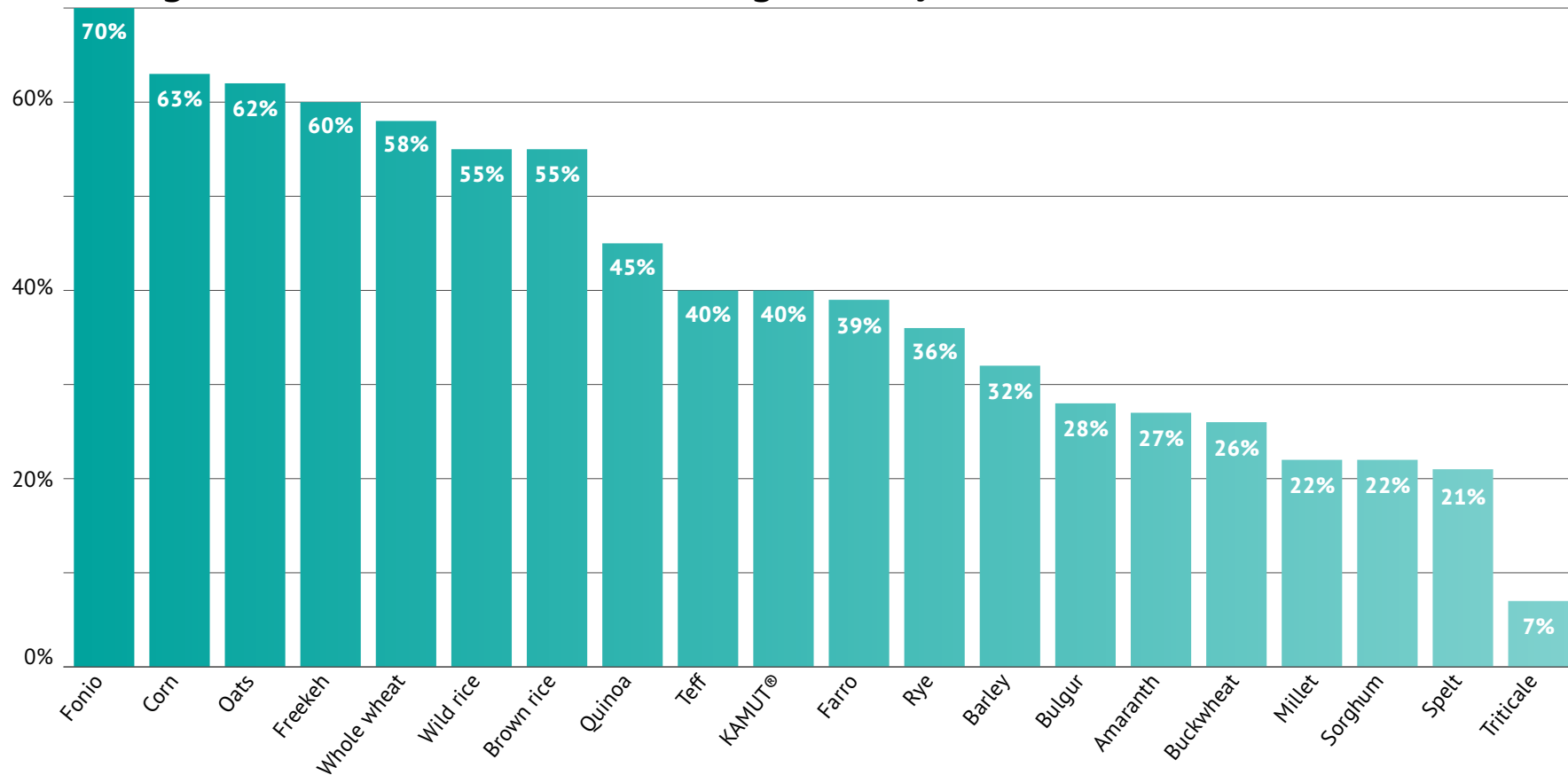
This year, significantly more people have tried **corn**, **buckwheat**, and **rye**.

Grains that consumers have eaten, 2021 and 2023



# Less familiar grains like fonio, freekeh, teff, and farro **become favorites** once consumers have tried them.

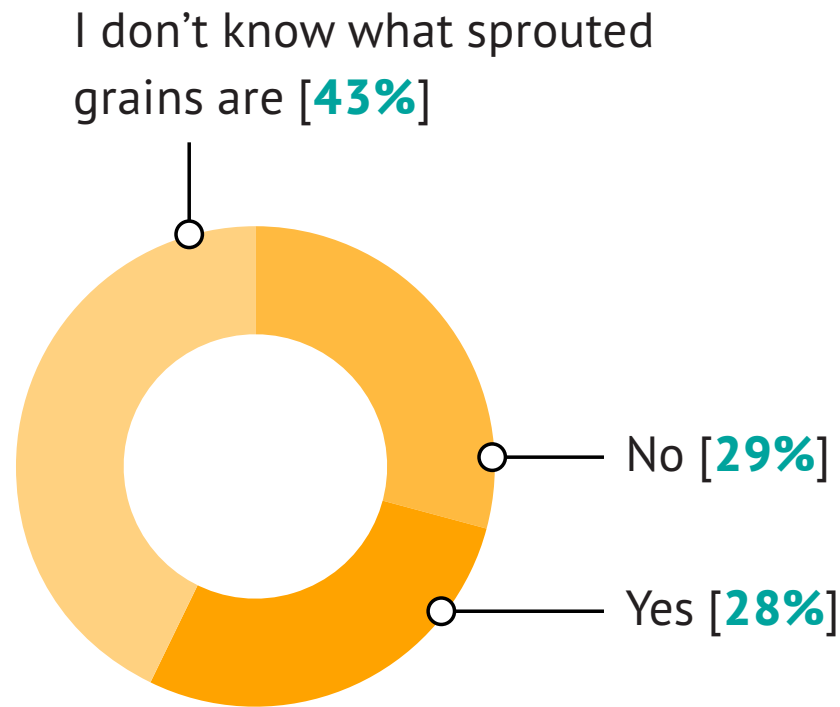
Percentage of consumers who consider a grain they've eaten to be a favorite



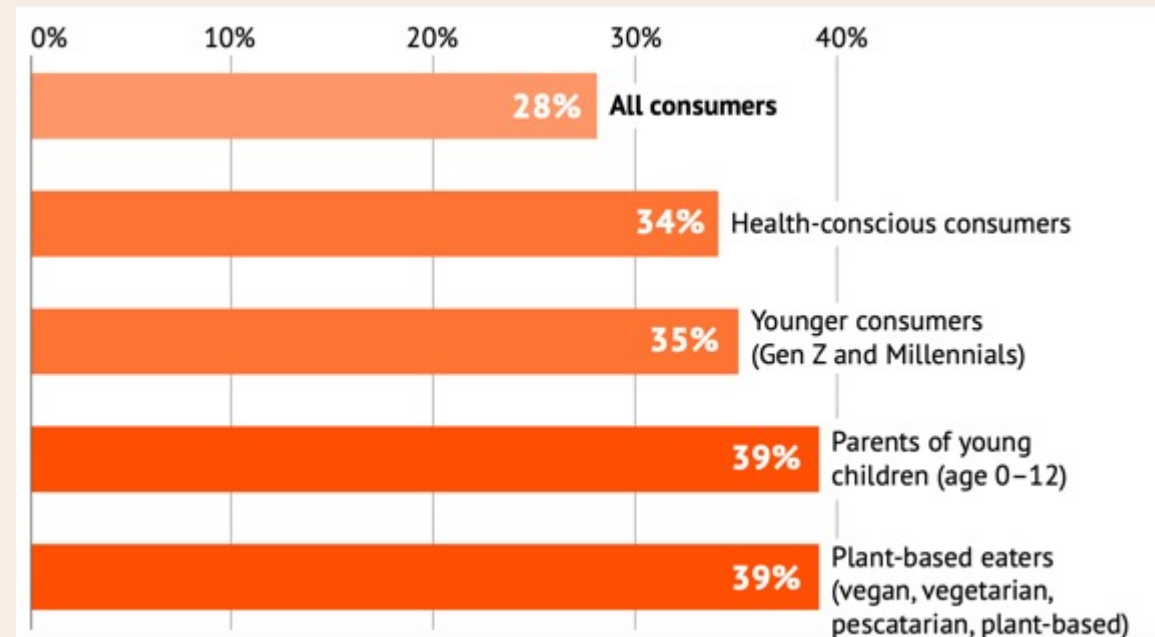


# Only about a quarter of consumers know about sprouted grains and seek them out.

Percentage of consumers who eat/buy products made with sprouted grains

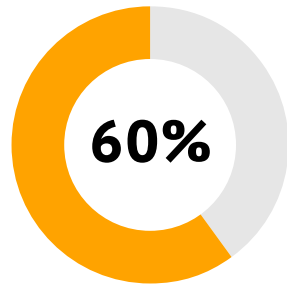


Significantly more consumers in the following demographic groups reported seeking out sprouted grains:

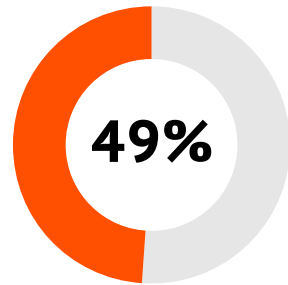


# The top reason consumers choose sprouted grains is their **flavor and taste**.

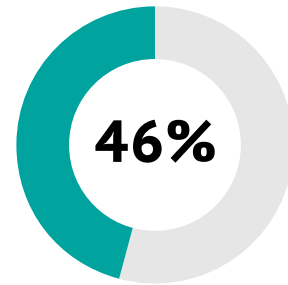
## Reasons for choosing sprouted grains



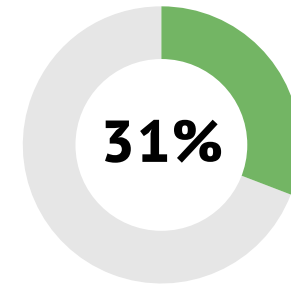
Flavor and taste



Digestibility



Bioavailability of nutrients



Reduced anti-nutrients/ phytates

## Frequency with which consumers of sprouted grains choose them



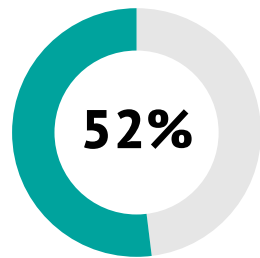
I nearly always choose sprouted grains whenever they are available.

I choose sprouted grains about half the time.

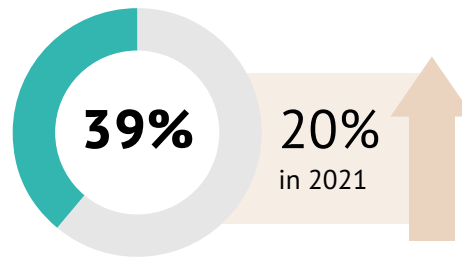
I occasionally choose sprouted grains.

# Half of American consumers are eating more home-cooked meals, and over a third are eating more whole grains.

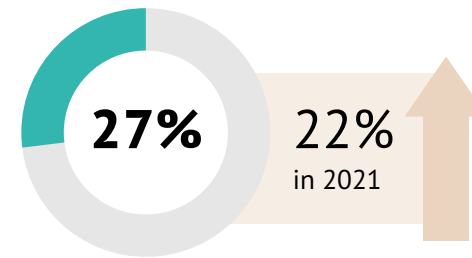
## Changes in eating/cooking habits in the past 5 years



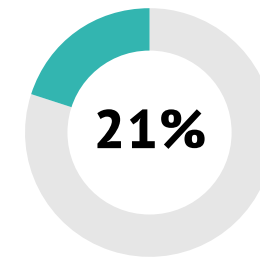
I eat more home-cooked meals



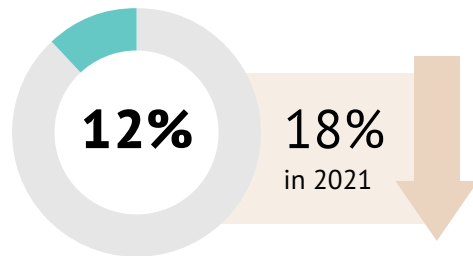
I am eating more whole grains



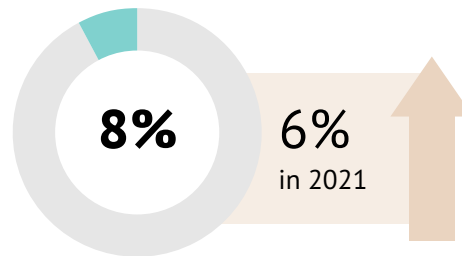
I am doing more baking at home



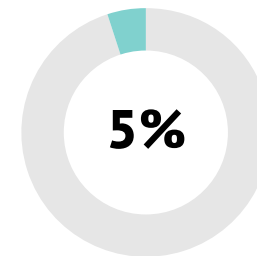
My habits have not changed



I order more takeout



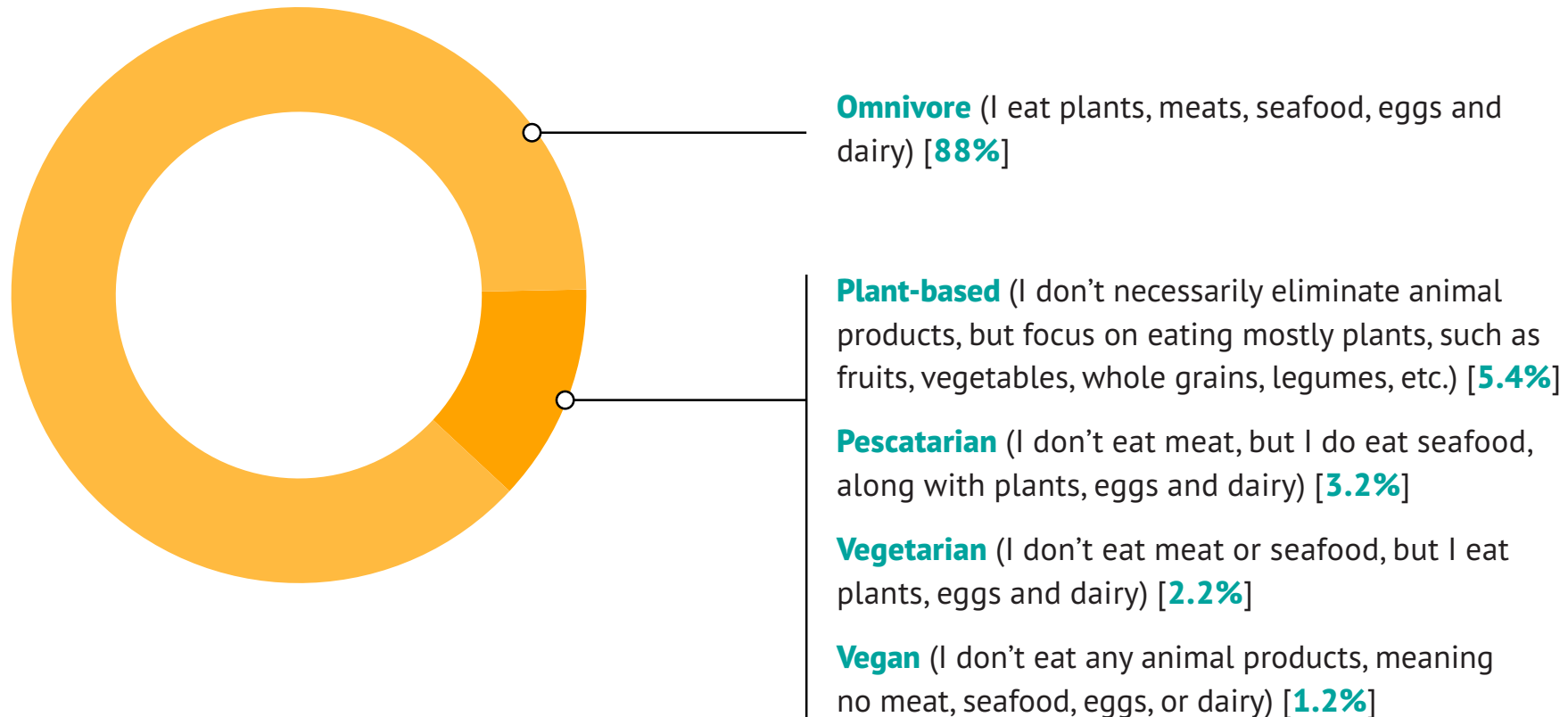
I am eating fewer whole grains



I use more meal kits/food subscription services

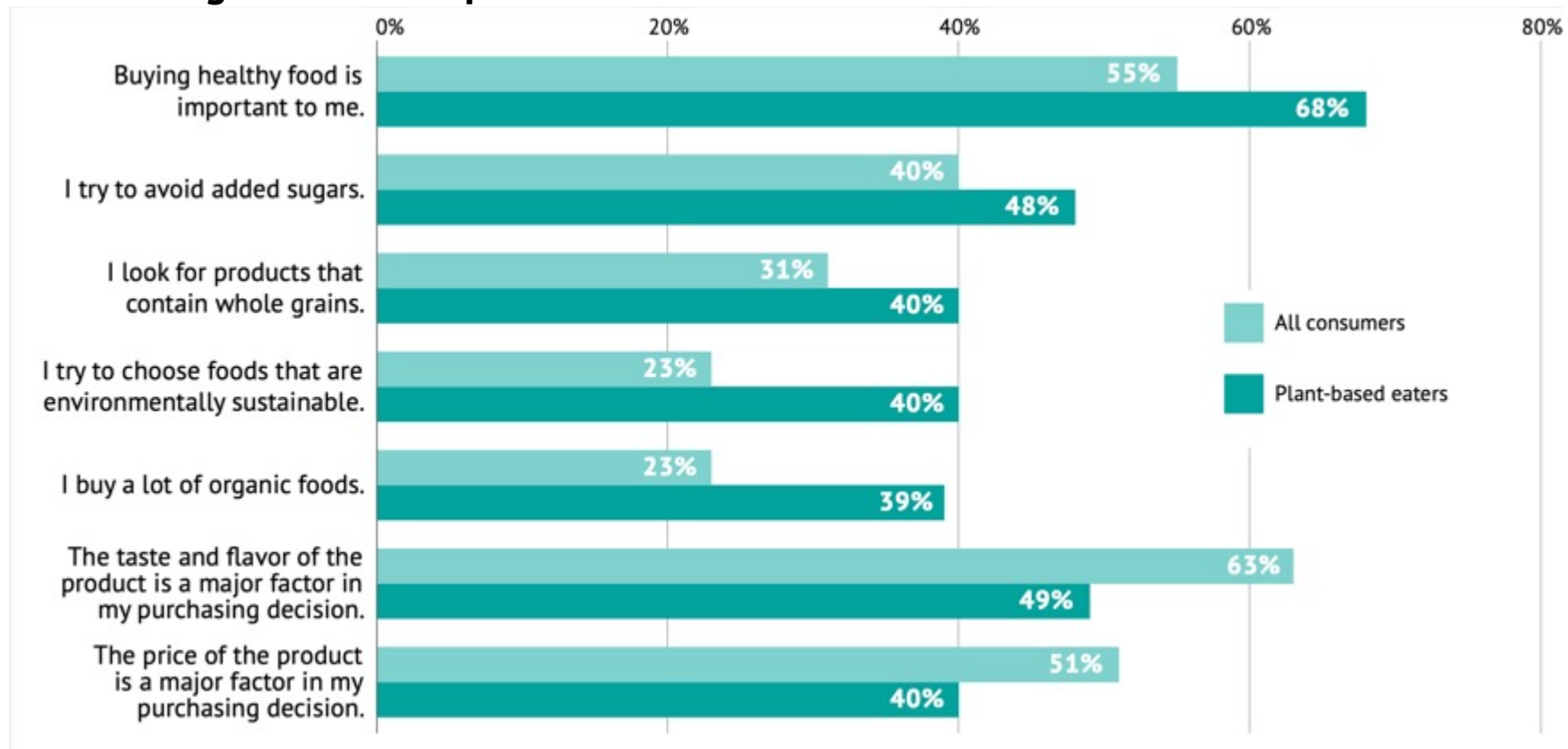
# The vast majority of consumers are omnivores.

## Consumer eating habits and preferences



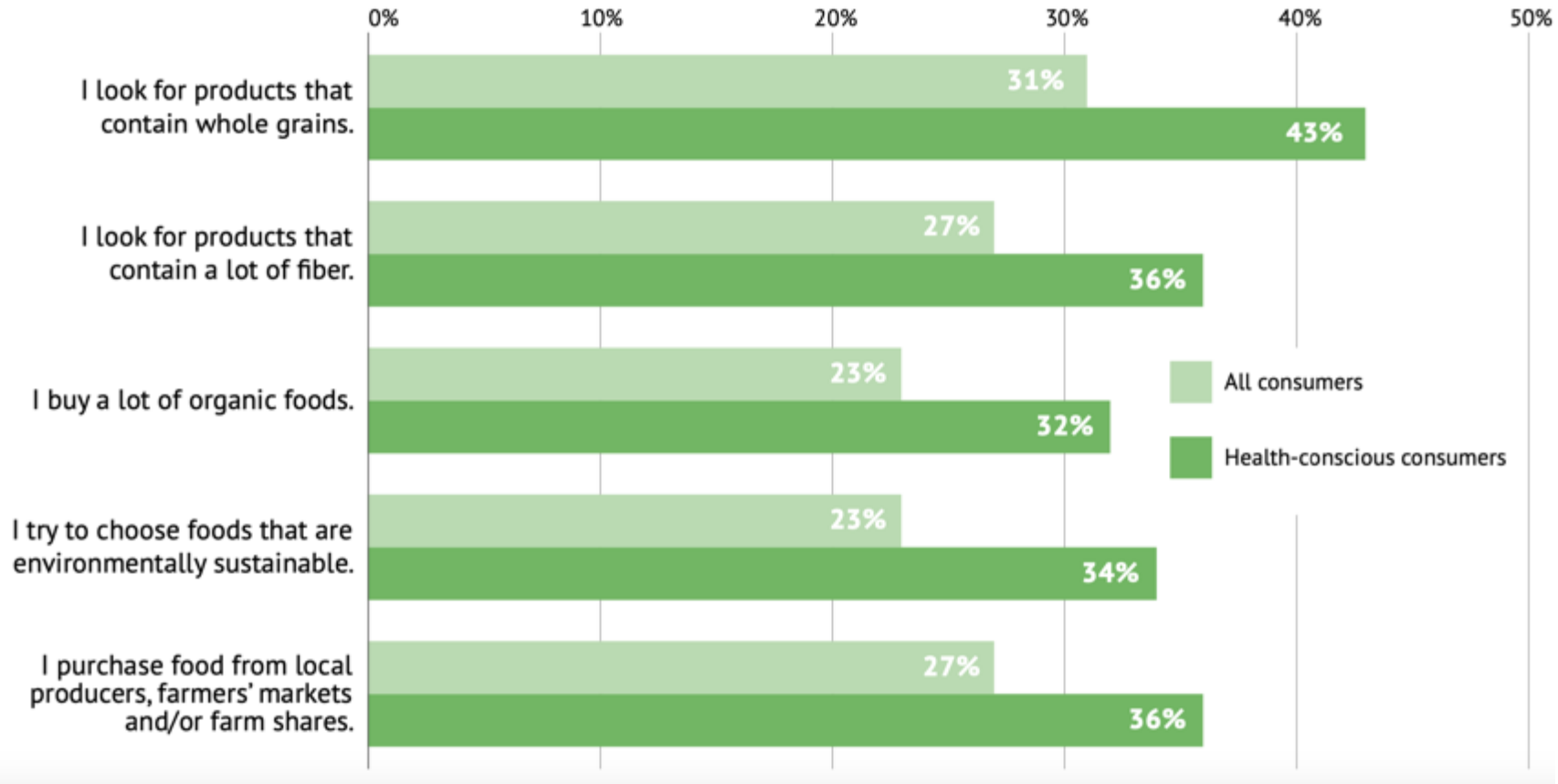
# Consumers who eat a **plant-based diet** prioritize foods that are **healthy, whole grain, sustainable, or organic.**

Purchasing decisions of plant-based eaters



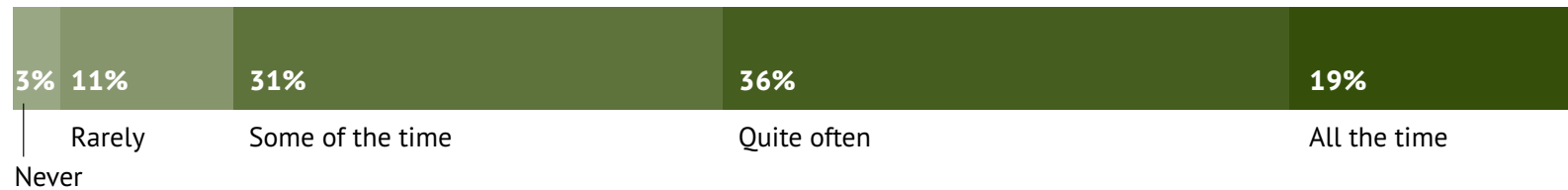
# Consumers who are health-conscious also look for **whole grain, organic, or sustainable** foods. They buy from **local producers** more frequently.

Purchasing decisions of consumers who say that healthy food is important to them

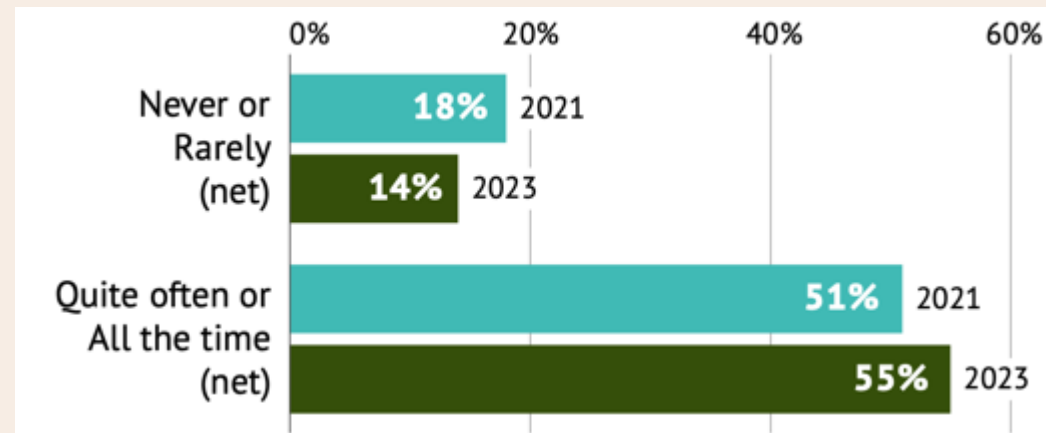


# Most consumers—86%—say they **read packaging labels** like the Nutrition Facts Panel **at least some of the time.**

Frequency with which consumers read packaging labels when buying food

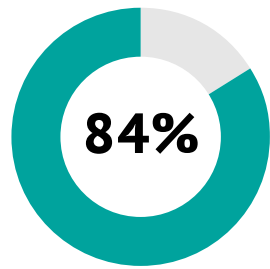


Between 2021 and 2023, **fewer** consumers said they **never or rarely** read packaging labels, and **more** consumers read them **quite often or all the time.**

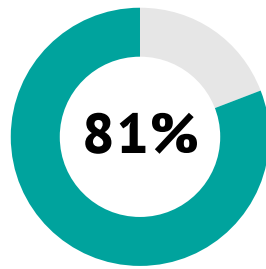


# When deciding what to eat, consumers most commonly consider how **tasty, healthy, and nutritious** a food is.

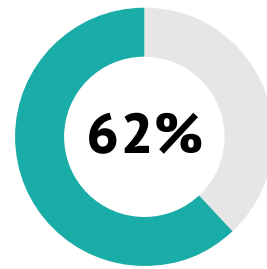
Percentage of consumers who marked each factor as one of the top five that they consider when deciding what to eat



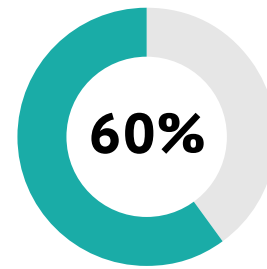
Taste



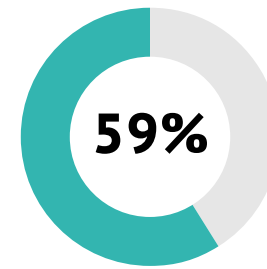
Healthy



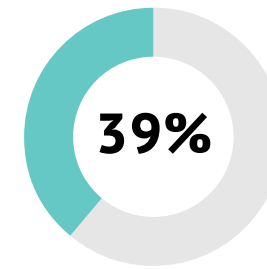
Whole-food ingredients



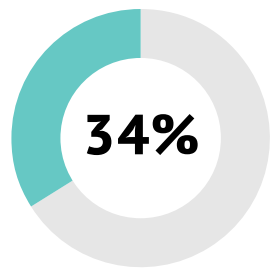
High-protein



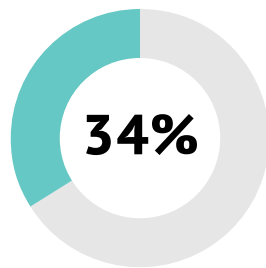
Nutrient-rich



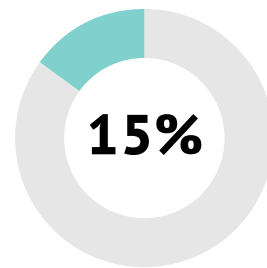
Low calorie



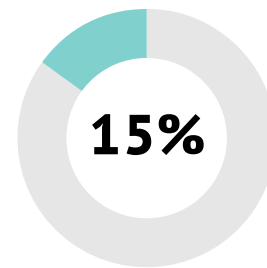
Family-friendly



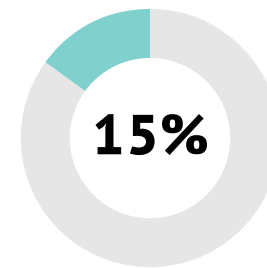
Organic



Gluten-free



Lack of allergens

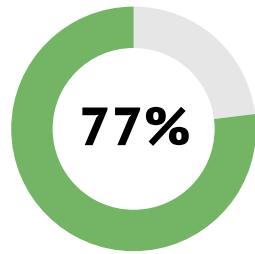


Plant-based

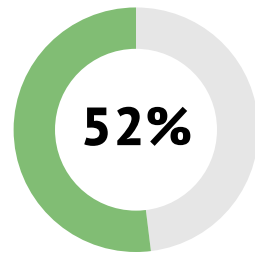


# Family, restaurant meals, and cooking shows or books are the most popular sources of meal and recipe inspiration for consumers.

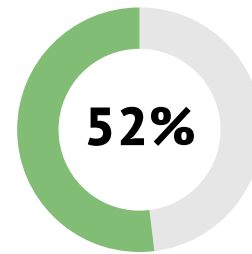
Percentage of consumers who marked each inspiration source as one of their top three most influential



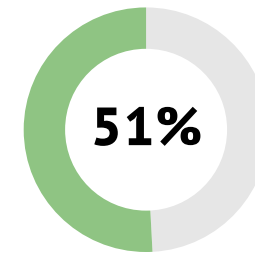
Family



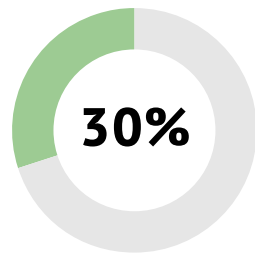
Restaurant meals



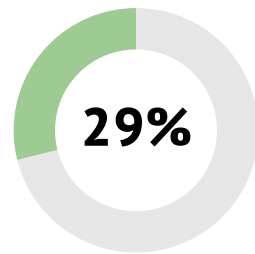
Cooking shows,  
books, or magazines



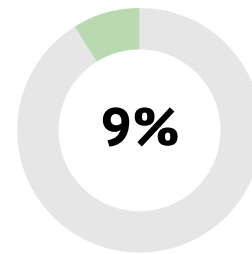
Friends



Professional chefs



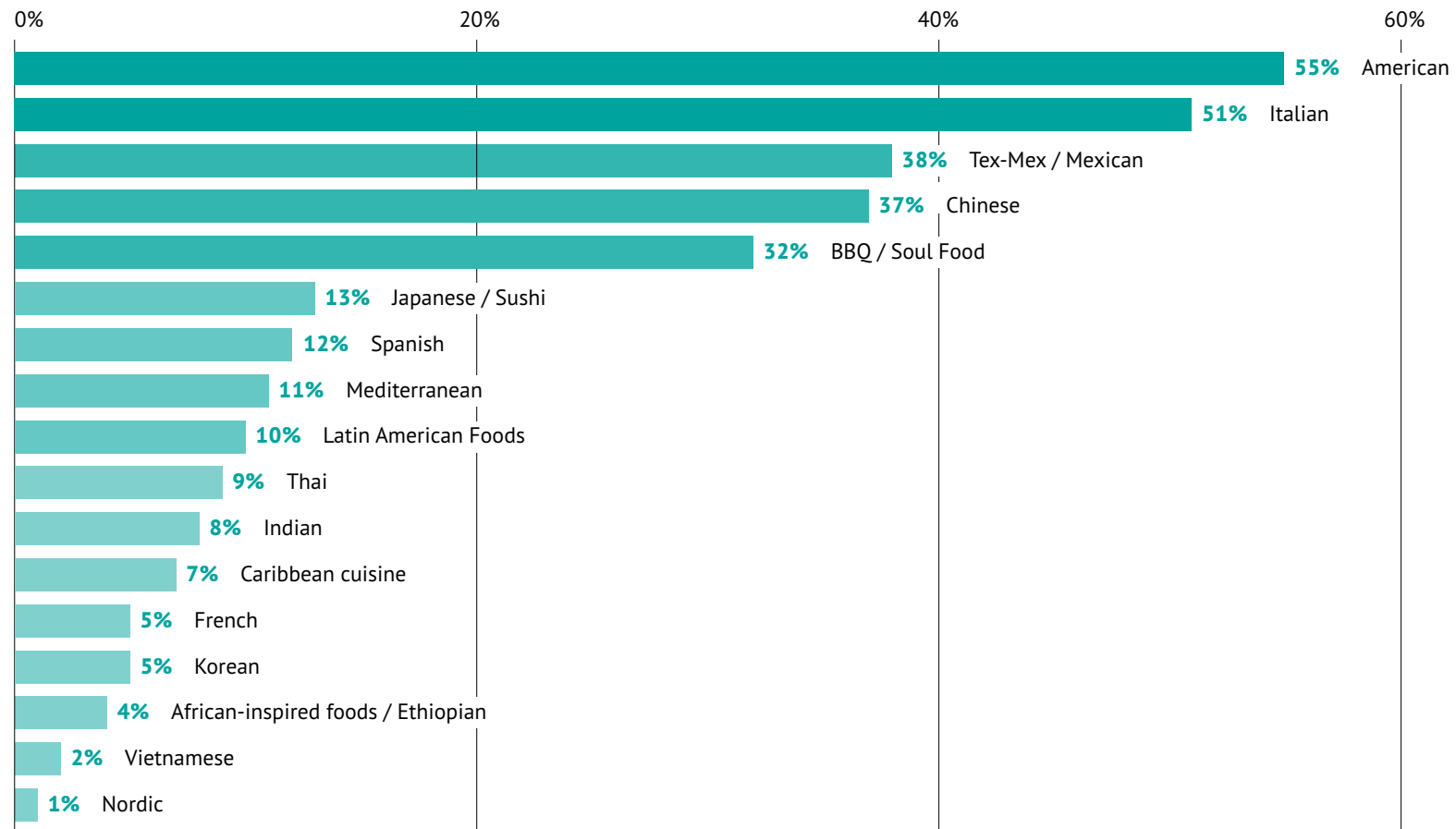
Social media



Other

# Among American consumers, the most popular cuisines are **American, Italian, Tex-Mex/Mexican, Chinese, and BBQ/Soul Food.**

Percentage of consumers who marked each cuisine as one of their top three favorites



# Fewer **younger consumers** favor the top-ranked cuisines; they appear interested in a **broader range** of cuisines.

Differences in cuisine preferences between older consumers (Gen X, Boomers, the Silent Generation) and younger consumers (Gen Z and Millennials)

Cuisine	Older Consumers	Younger Consumers	Change
American	58%	51%	-7
Italian	53%	46%	-7
Tex-Mex/Mexican	41%	34%	-7
Chinese	40%	31%	-9
BBQ/Soul Food	32%	32%	0
Japanese/Sushi	10%	18%	+8
Mediterranean	11%	11%	0
Spanish	9%	17%	+8
French	5%	5%	0
Latin American Foods	8%	13%	+5
Thai	9%	8%	-1
Caribbean cuisine	6%	9%	+3
Indian	8%	7%	-1
Korean	4%	7%	+3
African-inspired/Ethiopian	2%	7%	+5
Nordic	1%	1%	0
Vietnamese	3%	2%	-1



# **Profile of Whole Grain Stamp Enthusiasts**

# Demographic Profile of Whole Grain Stamp Enthusiasts

- ➔ More likely to be young (Gen Z and Millennials) *[46% of Stamp enthusiasts, compared with 36% of consumers overall]*
  - ➔ **SIGNIFICANTLY** more likely to be parents *[43% of Stamp enthusiasts have children under 18 in their household, compared with 29% of consumers overall]*
- ➔ More likely to be Black or Latinx *[43% of Stamp enthusiasts, compared with 34% of consumers overall]*
  - ➔ Slightly more likely to follow some kind of plant-based diet (vegan, vegetarian, pescatarian, or plant-based) *[16% of Stamp enthusiasts compared with 12% overall]*

# What They Look For When Shopping

Those who actively seek out the Whole Grain Stamp are more likely to...

- ➔ Actively seek out whole grains
- ➔ Look for high-fiber foods
- ➔ Buy healthy food
- ➔ Try new ingredients
- ➔ Buy organic food
- ➔ Choose foods for sustainability reasons
- ➔ Buy from farmers' markets and local producers

They are less likely to...

- ➔ Say taste and flavor are major influences on their purchasing
- ➔ Stick to eating foods they're familiar with
- ➔ Be highly price-sensitive

# Stamp Enthusiasts and Whole Grains

These shoppers are more likely to...

- ➔ Say they choose whole grains at least half the time
- ➔ Choose whole grains because of their great taste, and for environmental reasons
- ➔ Say they are in the habit of choosing whole grains
- ➔ View the taste of whole grains as a benefit rather than a barrier
- ➔ Be familiar with other lesser-known whole grains
- ➔ Be familiar with sprouted grains
- ➔ Choose whole grain options whenever available at restaurants

# Stamp Enthusiasts and Whole Grains

Additionally...

- ➔ Their consumption of whole grain foods across **every category** (e.g. breads, pastas, cereals, crackers, tortillas, pizza crusts, etc.) is **significantly higher** than respondents overall *AND* they are still much more likely to say they want to eat significantly more whole grains than they already do
- ➔ 91% of Stamp enthusiasts say they want the whole grain content of foods (grams of whole grain) displayed on product packaging *[compared with 79% of consumers overall]*
- ➔ 75% of these shoppers say that *not* seeing the Stamp makes them question a product's whole grain claims *[this is true of 58% of all shoppers]*



# Additional Characteristics

Those who actively seek out the Stamp are also more likely to...

- ➔ Eat a lot of home-cooked meals and bake frequently
- ➔ Use meal kits and food subscription services
- ➔ Read the Nutrition Facts Panels on products they're buying
- ➔ Look for and trust third-party labeling

These shoppers believe the best ways to increase whole grain consumption are:

- #1 - increase variety & availability of whole grains
- #2 - provide more education about benefits of whole grains
- #3 - reduce the cost of whole grain options



# Summary of Key Survey Findings

1. Whole grain intake on the rise
2. The Whole Grain Stamp as a powerful and trusted tool
3. The importance of whole grain content labeling and third-party certifications
4. Consumer sensitivity to food prices
5. Low-carb and gluten-free fad diets on the decline
6. Sustainability as a motivation for choosing whole grains



# Questions?

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