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

Shelley Goldberg, MPH, RD
International Food Information Council Foundation

Just Ask for Whole Grains
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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 Consumer Attitudes Toward Functional Foods 2007
## Methodology

<table>
<thead>
<tr>
<th>METHODOLOGY</th>
<th>Web survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>POPULATION</td>
<td>Representative sample of Americans aged 18+</td>
</tr>
<tr>
<td>DATA COLLECTION PERIOD</td>
<td>February 19-March 9, 2007</td>
</tr>
<tr>
<td>SAMPLE SIZE (ERROR)</td>
<td>n=1,000  (+ 3.1) pp</td>
</tr>
<tr>
<td>DATA WEIGHTING*</td>
<td>Data weighted to the US Census by age, education, and gender</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.

IFIC Foundation Food and Health Survey 2007
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

IFIC Foundation Food & Health Survey 2007
However, Not All Consumers are Satisfied with Their Health Status

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

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

Significant decrease from ‘06
Prevalence of Dietary Changes

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

2007

66% \(\pi\)  
34% \(\theta\)

2006

57%  
43%

\(\pi\) Significant increase from ‘06  
\(\theta\) Significant decrease from ‘06

(n=1000)
Drivers of Dietary Changes

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

- To improve my overall well-being: 70% (n=660)
- To improve my physical health: 65% (n=660)
- To lose weight: 70%π (n=660)
- Specific health condition: 37% (n=660)
- Maintain my weight: 20% (n=660)

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”.
Changes Made to Improve Healthfulness of Diet

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

<table>
<thead>
<tr>
<th>Change</th>
<th>2007</th>
<th>2006</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consuming less of a specific type of food or beverage</td>
<td>65%</td>
<td>68%</td>
<td>3% decrease</td>
</tr>
<tr>
<td>Changing meal/snack patterns</td>
<td>59%</td>
<td>55%</td>
<td>4% increase</td>
</tr>
<tr>
<td>Reducing amounts of food and beverages</td>
<td>58%</td>
<td>57%</td>
<td>1% increase</td>
</tr>
<tr>
<td>Eating fewer calories</td>
<td>48%</td>
<td>42%</td>
<td>6% increase</td>
</tr>
<tr>
<td>Consuming more of a specific type of food/beverage</td>
<td>40%</td>
<td>31%</td>
<td>9% increase</td>
</tr>
<tr>
<td>Eating more of a certain food component</td>
<td>36%</td>
<td>29%</td>
<td>7% increase</td>
</tr>
<tr>
<td>Eating less of a certain food component</td>
<td>25%</td>
<td>16%</td>
<td>9% increase</td>
</tr>
</tbody>
</table>

*Significant increase from ‘06*
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)

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste</td>
<td>53%</td>
<td>35%</td>
</tr>
<tr>
<td></td>
<td>54%</td>
<td>31%</td>
</tr>
<tr>
<td>Price</td>
<td>37%</td>
<td>35%</td>
</tr>
<tr>
<td></td>
<td>35%</td>
<td>28%</td>
</tr>
<tr>
<td>Healthfulness</td>
<td>25%</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>26%</td>
<td>32%</td>
</tr>
<tr>
<td>Convenience</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td>19%</td>
<td>30%</td>
</tr>
</tbody>
</table>

π Significant increase from ‘06

IFIC Foundation Food & Health Survey 2007
## Concern with Carbohydrates

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Not Concerned</th>
<th>Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>22%</td>
<td>51%</td>
</tr>
<tr>
<td>2007</td>
<td>19%</td>
<td>55%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Not Concerned</th>
<th>Concerned</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>24%</td>
<td>47%</td>
</tr>
<tr>
<td>2007</td>
<td>20%</td>
<td>52%</td>
</tr>
</tbody>
</table>

π Significant increase from ‘06

(n=1000)

IFIC Foundation Food and Health Survey 2007
### Awareness of Sugars, Low-Calorie Sweeteners, and Carbohydrates

**Percent Heard (n=1000)**

<table>
<thead>
<tr>
<th>Carbohydrates</th>
<th>2007</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole grains</td>
<td>83%</td>
<td>θ</td>
</tr>
<tr>
<td>Fiber</td>
<td>83%</td>
<td>θ</td>
</tr>
<tr>
<td>Complex carbs</td>
<td>59%</td>
<td>58%</td>
</tr>
<tr>
<td>Refined carbs</td>
<td>41%</td>
<td>42%</td>
</tr>
</tbody>
</table>

θ Significant decrease from ‘06

*IFIC Foundation Food and Health Survey 2007*
# Carbohydrates Consumption Trends

<table>
<thead>
<tr>
<th>Category</th>
<th>2007 (n=215)</th>
<th>2006 (n=223)</th>
<th>2007 (n=320)</th>
<th>2006 (n=301)</th>
<th>2007 (n=410)</th>
<th>2006 (n=424)</th>
<th>2007 (n=427)</th>
<th>2006 (n=427)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refined carbs</td>
<td>2%</td>
<td>6%</td>
<td>28%</td>
<td>23%</td>
<td>71%</td>
<td>73%</td>
<td>72%</td>
<td>73%</td>
</tr>
<tr>
<td></td>
<td>61%</td>
<td>56%</td>
<td>27%</td>
<td>29%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>37%</td>
<td>38%</td>
<td>44%</td>
<td>48%</td>
<td>26%</td>
<td>22%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Complex carbs</td>
<td>23%</td>
<td>29%</td>
<td>28%</td>
<td>27%</td>
<td>71%</td>
<td>73%</td>
<td>72%</td>
<td>73%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>27%</td>
<td>29%</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>44%</td>
<td>48%</td>
<td>26%</td>
<td>22%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Whole grains</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fiber</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- More
- Less
- Neither

IFIC Foundation Food and Health Survey 2007

• Measure consumer interest in and awareness of “functional foods” and “personalized nutrition”


• Sample population: randomly selected U.S. Adults (18 ≥ yrs old)

• Completed interviews/sample size: 1,000 (2005-2007)
What are your top three health concerns, listed in order of importance to you?
(Unaided, Multiple Responses) (n=1000)

*Includes heart disease, blood pressure, cholesterol, and stroke
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)

IFIC Consumer Attitudes Toward Functional Foods 2007
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)

IFIC Consumer Attitudes Toward Functional Foods 2007
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)

IFIC Consumer Attitudes Toward Functional Foods 2007
**Food Components Identified as Beneficial in Obesity Prevention & Weight Management**

<table>
<thead>
<tr>
<th>Obesity/Prevention of Unhealthy Weight Gain</th>
<th>Weight Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Water</td>
<td>• Low-fat foods</td>
</tr>
<tr>
<td></td>
<td>7%</td>
</tr>
<tr>
<td>• Low-fat foods</td>
<td>6%</td>
</tr>
<tr>
<td>• Milk</td>
<td>6%</td>
</tr>
<tr>
<td>• Fish, fish oil</td>
<td>4%</td>
</tr>
<tr>
<td>• Fiber</td>
<td>3%</td>
</tr>
<tr>
<td>• Whole Grain</td>
<td>3%</td>
</tr>
<tr>
<td>• Green tea</td>
<td>3%</td>
</tr>
</tbody>
</table>

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)

IFIC Consumer Attitudes Toward Functional Foods 2007
### 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)*

IFIC Consumer Attitudes Toward Functional Foods 2007
High Awareness of Some Long-Established Diet & Health Pairs

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).

IFIC Consumer Attitudes Toward Functional Foods 2007
Top Food Components Consumed for Added Benefits

Fiber for maintaining a healthy digestive system (n=427)
- 37% Very or somewhat likely to consume
- 57% Already eating for that effect

Calcium for the promotion of bone health (n=449)
- 37% Very or somewhat likely to consume
- 56% Already eating for that effect

Whole grains for reduced risk of heart disease (n=362)
- 40% Very or somewhat likely to consume
- 56% Already eating for that effect

Vitamin D for the promotion of bone health (n=403)
- 39% Very or somewhat likely to consume
- 53% Already eating for that effect

Antioxidants for protection against free radical damage implicated in aging and various chronic diseases (n=357)
- 41% Very or somewhat likely to consume
- 52% 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).

IFIC Consumer Attitudes Toward Functional Foods 2007
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

For more information:

IFIC Foundation
1100 Connecticut Avenue NW, Suite 430
Washington, DC 20036
Phone: (202) 296-6540
Web: http://ific.org