Welcome!
Please dial in to the audio portion:
(866) 837-9789
Today’s Speakers

• Jennifer Schleman, APR
  Director, Public Outreach and Online Communications

• Wendy Reinhardt Kapsak, MS, RD
  Director, Health and Wellness

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2009 Food & Health Survey
Agenda

• Brief Background

• Presentation of Findings

• Summary and Implications

• Questions and Answers

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2009 Food & Health Survey
International Food Information Council Foundation

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

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

http://www.ific.org

2009 Food & Health Survey
International Food Information Council and Foundation Consumer Research: Food Labeling

- Food Label Quantitative Web Survey and Experiment (2008)
- Food Label Ethnographic and Focus Group Research (2006)

[http://ific.org/research](http://ific.org/research)
**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 11, 2009</td>
</tr>
<tr>
<td>Data Weighting*</td>
<td>Data Weighted on Age, Gender, Income, Education and Race</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.
Confused and Conflicted: How Consumers View Food News, Labels, and Other Food Information

Food and Health Information Sources
Food Labeling
Dietary Guidance and MyPyramid
Purchasing Influencers

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Food and Health Information

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Consumers Are Interested in Food and Health Information AND... Are Searching for Consistent and/or Positive Messages.

Reading or hearing about the relationship between food and health is of interest to me*

I feel that food and health information is confusing and conflicting

I am more interested in hearing about what TO eat, rather than what NOT to eat

<table>
<thead>
<tr>
<th>Disagree</th>
<th>Neither</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>24%</td>
<td>67%</td>
</tr>
<tr>
<td>29%</td>
<td>29%</td>
<td>42%</td>
</tr>
<tr>
<td>13%</td>
<td>31%</td>
<td>56%</td>
</tr>
</tbody>
</table>

*Total does not add to 100 percent due to rounding

▲ / ▼ 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
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Consumers’ Reported Use of Information on the Food and Beverage Package

What information do you look for on the food or beverage package when deciding to purchase or eat a food or beverage? Select all that apply. (n=1064)

- Nutrition Facts panel: 69%
- Expiration date: 67%
- Brand name: 50% ▲ ’08/’07/’06
- Ingredients list: 49%
- Size of product: 43% ▼ ’08/’06
- Statements about health benefits: 20%
- Country of origin labeling: 17%
- Organic**: 13% ▼ ’06
- Allergen labeling: 11% ▲ ’08/’07
- Health symbol or health icon: 10%
- None of the above: 6%

▲ / ▼ Significant increase/decrease from year indicated

2009 Food & Health Survey
The Nutrition Facts panel: When do they look at it?

MORE

New items

*Items with front claims*

*Items with similar front claims*

Items with same price points

Items requested by another adult with a health concern

Items requested by children

Items with changed recipes, like sauce or flavorings

"Something I haven't tried...I probably would look at it and say, 'OK, let's see...'

—Roberta

"I look at the NFP when I already think the product might be high in fat." —Tiffany

LESS

Routine items

Single ingredient products (e.g., milk or eggs)

Items requested by other healthy adults

Discount items

## Consumers’ Reported Use of Information on the Nutrition Facts panel

<table>
<thead>
<tr>
<th>Information</th>
<th>Use (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calories</td>
<td>75%</td>
</tr>
<tr>
<td>Total Fat</td>
<td>69% ▼ '06</td>
</tr>
<tr>
<td>Sugars</td>
<td>61% ▼ '08</td>
</tr>
<tr>
<td>Trans Fat</td>
<td>57% ▼ '07/▲ '06</td>
</tr>
<tr>
<td>Sodium</td>
<td>56%</td>
</tr>
<tr>
<td>Saturated Fat</td>
<td>56%</td>
</tr>
<tr>
<td>Serving size</td>
<td>54% ▼ '06</td>
</tr>
<tr>
<td>Calories from fat</td>
<td>52%</td>
</tr>
<tr>
<td>Number of servings per package</td>
<td>48% ▼ '08/'06</td>
</tr>
<tr>
<td>Carbohydrates</td>
<td>45% ▼ '06</td>
</tr>
<tr>
<td>Fiber</td>
<td>44% ▼ '08</td>
</tr>
<tr>
<td>Cholesterol</td>
<td>42% ▼ '07/'06</td>
</tr>
<tr>
<td>Protein</td>
<td>39% ▲ '07</td>
</tr>
<tr>
<td>Vitamins and minerals</td>
<td>31% ▼ '06</td>
</tr>
<tr>
<td>Calcium</td>
<td>22% ▼ '06</td>
</tr>
<tr>
<td>Potassium</td>
<td>13% ▼ '08/'06</td>
</tr>
</tbody>
</table>

(IF USE) Which of the following information, if any, do you use on the Nutrition Facts panel? Select all that apply. (n=763)

▲ / ▼ Significant increase/decrease from year indicated

2009 Food & Health Survey
Very Few Americans Have Knowledge of The Amount of Calories They Should Get per Day.

As far as you know, how many calories should a person of your age, weight, and height consume per day? (n=1064)

63 percent responded but estimated incorrectly.

Over-estimate 47% ▲ ’06

Estimate correctly 11% ▼ ’08

Under-estimate 16% ▲ ’06

Unaware 26% ▼ ’07/’06

▲ / ▼ Significant increase/decrease from year indicated
Approaches to Improving Consumers’ Use of Food and Health Information on the Label

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Three primary challenges limiting consumers’ ability to use the NFP to make healthful, balanced choices

1. Consumers find the serving size information misleading.

2. Consumers do not consider their consumption of foods and beverages in the context of their daily intake.

3. Consumers do not realize information to help them interpret daily context exists on the current NFP.
Desired NFP Improvements

Based on the primary challenges limiting consumers’ ability to use the NFP, three desired improvements were identified:

1. **Clarify serving size.**
   Illustrate that serving size is not arbitrary and increase consumers’ ability to comprehend how serving size relates to the entire NFP.

2. **Call attention to daily intake.**
   Encourage consumers to think about all the foods and nutrients that make up a balanced diet.

3. **Simplify % Daily Value.**
   Improve %DV use and comprehension.
In Summary…

- The mention of a government body, like the FDA, in a highly used area of the NFP, such as a header in the main body of the grid, increases trust in the information provided, particularly serving size.

- Moving the location of calories into the main body of the NFP encourages greater use.

- Adding the %DV of calories helps consumers consider a product within the context of their daily diet.

- Moving the information in the current footnote into an easily referenced column in the main body of the NFP (3rd column) greatly increases consumers’ ability to evaluate a product.
Continuum of Nutrition Information on Food Packages

GDA Approach

Fact-based

Health & Nutrient Content Claims

“Better-for-You”

“Healthy”

“Better-For-You”

Nutrition Facts

Each 3/4 cup (125g) serving provides these percentages of the GDA based on a 2,000 calorie diet.

Calories 110
Total Fat 0%
Sodium 0%
Sugar 11%

Each portion contains:

Calories 139
Total Fat 6%
Sodium 0%
Sugar 2%
Vitamin A 10%
Vitamin C 10%
Initial Consumer Response to Front-of-Pack Labeling

- Evaluation of front-of-pack systems are limited.
- Hannaford Brothers
  - Conducted a one-year evaluation of their Guiding Stars program
- Tesco
  - Research on fact-based GDA labeling
- European Food Information Council
  - Study of European systems
- FDA qualitative and quantitative research
- IOM Research
Consumers’ Reported Use of Information on the Ingredients List

<table>
<thead>
<tr>
<th>Ingredient Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of fat/oil</td>
<td>66%</td>
</tr>
<tr>
<td>Sweeteners</td>
<td>62%</td>
</tr>
<tr>
<td>Natural ingredients</td>
<td>49%</td>
</tr>
<tr>
<td>Order of ingredients on list</td>
<td>47%</td>
</tr>
<tr>
<td>Artificial ingredients</td>
<td>44%</td>
</tr>
<tr>
<td>Preservatives</td>
<td>44%</td>
</tr>
<tr>
<td>Vitamins/minerals</td>
<td>36%</td>
</tr>
<tr>
<td>Caffeine</td>
<td>30%</td>
</tr>
<tr>
<td>Flavors/spices</td>
<td>23%</td>
</tr>
<tr>
<td>Length of ingredients list</td>
<td>20%</td>
</tr>
<tr>
<td>Food colors</td>
<td>16%</td>
</tr>
<tr>
<td>Allergens</td>
<td>16%</td>
</tr>
<tr>
<td>Ability to pronounce ingredient name(s)</td>
<td>12%</td>
</tr>
</tbody>
</table>

(IF USE INGREDIENT INFORMATION) What, specifically, are you looking for when it comes to using the ingredients portion of food and beverage packages? Select all that apply. (n=518)

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

2009 Food & Health Survey
Dietary Guidance and MyPyramid
U.S. Dietary Guidance and Tools

2010 Under Development

Nutrition Facts
Serving Size 1 cup (228g)
Servings Per Container 2

Amount Per Serving
Calories 260
Calories from Fat 120

% Daily Value*
Total Fat 13g 20%
Saturated Fat 5g 25%
Trans Fat 2g

Cholesterol 30mg 10%
Sodium 660mg 28%
Total Carbohydrate 31g 10%
Dietary Fiber 0g 0%
Sugar 5g

Protein 5g

Vitamin A 4%  •  Vitamin C 2%
Calcium 15%  •  Iron 4%

* Percent Daily Values are based on a 2,000 calorie diet. Your Daily Values may be higher or lower depending on your calorie needs.

Calories: 2,000  2,500
Total Fat  Less than 8g  8g
Saturated Fat  Less than 20g  25g
Cholesterol  Less than 300mg  300mg
Sodium  Less than 2,400mg  2,100mg
Total Carbohydrate  Less than 300g  30g
Dietary Fiber  25g  30g
Calories per gram: Fat 9  •  Carbohydrate 4  •  Protein 4

2009 Food & Health Survey
Which of the following best describes your familiarity with the “Dietary Guidelines for Americans,” which are the US government-approved, food and nutrition guidelines? (n=1064)*

*Total does not add to 100 percent due to rounding
Many Americans are Familiar with *MyPyramid*.

- **I have never heard of it**: 16%
- **I have heard of it, but know very little about it**: 34%
- **I know a lot about it**: 8%
- **I know a fair amount about it**: 42%

Which of the following best describes your familiarity with the government's Food Pyramid, called *MyPyramid*? (n=1064)
One Quarter of Americans Report Using *MyPyramid*.

- Changed my diet to lose weight: 12%
- Changed my diet or my family's diet to eat healthier based on the recommendation from MyPyramid: 11%
- Visited the MyPyramid Web site: 8%
- Used the tools on the MyPyramid Web site to plan or assess my diet: 7%
- None of the above: 72%

(IF HEARD OF) In which of the following ways, if any, have you used MyPyramid? *Select all that apply.* (n=897)
Sources of Contact with MyPyramid

Where, if at all, have you seen MyPyramid information? Select all that apply.  (n=1064)

NOTE: Responses less than five percent not shown
Purchasing Influencers
### Taste Still the Number One Factor Influencing Purchases; Price Increases to an All-Time High

<table>
<thead>
<tr>
<th>Factor</th>
<th>Some Impact</th>
<th>Great Impact</th>
<th>Total Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taste</td>
<td>34%</td>
<td>53%</td>
<td>87%</td>
</tr>
<tr>
<td>Price</td>
<td>31%</td>
<td>43%</td>
<td>74% ▲ ‘06</td>
</tr>
<tr>
<td>Healthfulness</td>
<td>35%</td>
<td>26%</td>
<td>61%</td>
</tr>
<tr>
<td>Convenience</td>
<td>26%</td>
<td>26%</td>
<td>52%</td>
</tr>
</tbody>
</table>

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

2009 Food & Health Survey
Communicating Nutrition and Health on Food Labels: In Summary…

- The food label contains many pieces of information that can help consumers make healthful choices.

- Many factors and influencers, not just labeling, impact consumers’ food choices.

- There is variation between what consumers’ say they like and what they will do with the information.

- Transparency on how labeling systems are derived is important. This includes criteria.
Communicating Nutrition and Health on Food Labels: Future Considerations

- Need to be aware of goals (short- vs. long-term) and potential for unintended consequences of consumer attempts to interpret and use information.

- Consumer research is necessary to ensure that new approaches help achieve goals.

- Any nutrition information must be accompanied by appropriate consumer education.
Upcoming Web Casts:

**August 12:** “Consumer Attitudes toward Functional Foods/Foods for Health”

**September:** *Food & Health Survey Series Part 3: “A Focus on Food Safety”*

**November:** *Food & Health Survey Series Part 4: “Americans’ Approach to Dieting and Weight Management Strategies”*
Food & Health Survey Report
Available on IFIC.org and Foundation Publications Store!

The Executive Summary is available at
http://www.ific.org/research/foodandhealthsurvey.cfm

Full Report is available for purchase at
http://www.ificpubs.org/servlet/Detail?no=47

Data Tables and Comparative Topline are available for purchase at
http://www.ificpubs.org/servlet/Detail?no=48
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• Registered Dietitians can download a Certificate of Completion for ONE CPE credit at:

http://www.ific.org/research/foodandheathsurvey.cfm