2013 IFIC Functional Foods Consumer Survey

Media Webcast
October 2, 2013
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Mission: To effectively communicate science-based information about food safety and nutrition to health and nutrition professionals, government officials, educators, journalists, and consumers.

Primarily supported by the broad-based food, beverage, and agricultural industries.
Today’s Discussion

- Functional Foods landscape
- 2013 IFIC Functional Foods Consumer Survey
- Summary
- Questions and Answers
“FUNCTIONAL FOODS”

Foods or food components that may provide benefits beyond basic nutrition

WORKING DEFINITION
Today’s Functional Food Landscape

Media Headlines
• Best Superfoods: Which Are The Healthiest Choices? (Huffington Post, 9/14)
• 15 Best Superfoods for Fall (ABC News, 9/7)

Academy of Nutrition and Dietetics Position Paper
• Reaffirms its position “that although all foods provide some level of physiological function, the term functional foods is defined as whole foods along with fortified, enriched, or enhanced foods that have a potentially beneficial effect on health when consumed as part of a varied diet on a regular basis at effective levels based on significant standards of evidence.”
• Outlines definition of functional foods, their role in health care, categories of functional foods and regulation, and scientific substantiation.

Dietary Guidelines
• From 2010 DGA: Dietary supplements or fortification of certain foods may be advantageous in specific situations to increase intake of a specific vitamin or mineral. In some cases, fortification can provide a food-based means for increasing intake of particular nutrients or providing nutrients in highly bioavailable forms.
• 2015 DGA: Opportunity to greater emphasize benefits of functional foods

FDA Consumer Study on Nutrient Content Claims on Fortified Foods
• The FDA has announced an information collection with opportunity to comment regarding a planned consumer study on nutrient content claims on fortified foods.
2013
FUNCTIONAL FOODS CONSUMER SURVEY

IFIC
International Food Information Council

[Images of various foods and shoppers]
Methodology

- This report presents the results of an online survey of 1,005 Americans ages 18 to 80.
- Some of the questions have been asked in prior Functional Foods/Foods for Health Surveys, allowing for trend analysis. However, this year’s survey includes many new topics as well.
- Fielding took place from July 9 to July 22, 2013.
- The duration of the survey was 20 minutes, on average.
- The results were weighted to ensure that they are reflective of the American population ages 18 to 80, as seen in the 2012 Current Population survey. Specifically, they were weighted by age, education, gender, and race/ethnicity.
- The survey was conducted by Mathew Greenwald & Associates, using Luth Research’s SurveySavvy panel.

Notes: Respondents who failed a series of attention checks or who completed the survey in less than one-third of the median completion time were not included in the final sample.
Percentages may not add to 100% or to totals shown due to rounding.
Percentages less than 4% may not appear with statistic on graphs.
Over one-third of consumers state that they are at least *very knowledgeable* about nutrition.

<table>
<thead>
<tr>
<th>Knowledge Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely knowledgeable</td>
<td>7%</td>
</tr>
<tr>
<td>Very knowledgeable</td>
<td>28%</td>
</tr>
<tr>
<td>Somewhat knowledgeable</td>
<td>43%</td>
</tr>
<tr>
<td>A little knowledgeable</td>
<td>17%</td>
</tr>
<tr>
<td>Not at all knowledgeable</td>
<td>4%</td>
</tr>
</tbody>
</table>

Consumers who are younger and those with *low to normal BMIs* are more likely to rate themselves as highly knowledgeable.

The same is true for consumers who *strongly agree that certain foods contain health benefits beyond basic nutrition.*
About half of consumers believe they get at least most of the nutrients/food components they need for good health from food.

Thinking of the foods you currently consume, how much of the nutrients and food components that you need for good health would you say you get?

(n=1,005)

- Food only
- Including vitamins/supplements (if applicable)

<table>
<thead>
<tr>
<th></th>
<th>Food only</th>
<th>Including vitamins/supplements</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>3%</td>
<td>10%</td>
</tr>
<tr>
<td>Nearly all</td>
<td>11%</td>
<td>23%</td>
</tr>
<tr>
<td>Most</td>
<td>35%</td>
<td>37%</td>
</tr>
<tr>
<td>Some</td>
<td>26%</td>
<td>39%</td>
</tr>
<tr>
<td>A little</td>
<td>5%</td>
<td>9%</td>
</tr>
<tr>
<td>None</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>
Approximately 3 out of 4 consumers report concerns that they are not getting the nutrients and food components they need for good health.

How concerned are you by the possibility that you are not getting all of the nutrients and food components that are needed for good health?

(n=1,005*)

- Very concerned: 14%
- Somewhat concerned: 29%
- Slightly concerned: 34%
- Not at all concerned: 23%

Consumers who rate their health as poor or fair are more likely to be very or somewhat concerned.

Women are more likely than men to be very or somewhat concerned.

Older consumers, meanwhile, are more likely to be not at all concerned about not getting all of the nutrients and food components needed for good health. This difference holds even among those who take vitamins/supplements.

*Those who indicated that they get all needed nutrients/food components were automatically coded as not at all concerned.
For nearly all of the nutrients or food components examined, at least six in ten consumers believe they get enough to meet their needs.

How much would you say you get of each of the following?  
(n=1,005)

<table>
<thead>
<tr>
<th>Nutrient</th>
<th>Enough to get a health benefit beyond my minimum needs</th>
<th>Just enough to meet my needs</th>
<th>Some, but not enough to meet my needs</th>
<th>None</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protein</td>
<td>45%</td>
<td>33%</td>
<td>13%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Vitamin C</td>
<td>39%</td>
<td>34%</td>
<td>17%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Vitamin D</td>
<td>34%</td>
<td>34%</td>
<td>21%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Calcium</td>
<td>32%</td>
<td>38%</td>
<td>21%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Fiber</td>
<td>32%</td>
<td>35%</td>
<td>24%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>B Vitamins</td>
<td>26%</td>
<td>33%</td>
<td>22%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Potassium</td>
<td>24%</td>
<td>37%</td>
<td>22%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Omega-3 fatty acids</td>
<td>21%</td>
<td>29%</td>
<td>27%</td>
<td>4%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Men as well as older consumers are more likely than their counterparts to say that they get enough of nearly all nutrients/food components examined to get a health benefit beyond their minimum needs.

A notable share of consumers show uncertainty regarding B vitamins, potassium, and omega-3 fatty acids.
### Consumers’ Perception vs. Reality

<table>
<thead>
<tr>
<th>Nutrient</th>
<th>% Perceived Meeting Needs</th>
<th>% Actually Meeting Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vitamin D</td>
<td>68%</td>
<td>32%</td>
</tr>
<tr>
<td>Vitamin C</td>
<td>73%</td>
<td>72%</td>
</tr>
<tr>
<td>Calcium</td>
<td>70%</td>
<td>64%</td>
</tr>
<tr>
<td>Potassium</td>
<td>61%</td>
<td>&lt;3%</td>
</tr>
<tr>
<td>Fiber*</td>
<td>67%</td>
<td>Approx. 5%*</td>
</tr>
<tr>
<td>B Vitamins</td>
<td>59%</td>
<td>Approx. 90%</td>
</tr>
</tbody>
</table>

*Data includes food and supplement intake. Values listed are for entire U.S. Population (≥ 2 years of age)


Over half of consumers say they are getting at least some antioxidants and probiotics but many say they are not consuming enough to get a health benefit.

How much would you say you get of each of the following?  
(n=1,005)

- **Antioxidants**
  - Enough to get a health benefit: 34%
  - Some, but not enough to get a health benefit: 38%
  - None: 4%
  - Not sure: 25%

- **Probiotics**
  - Enough to get a health benefit: 21%
  - Some, but not enough to get a health benefit: 31%
  - None: 11%
  - Not sure: 37%

- **Lutein**
  - Enough to get a health benefit: 14%
  - Some, but not enough to get a health benefit: 19%
  - None: 10%
  - Not sure: 56%

- **Flavonoids**
  - Enough to get a health benefit: 12%
  - Some, but not enough to get a health benefit: 20%
  - None: 9%
  - Not sure: 59%

- **Zeaxanthin**
  - Enough to get a health benefit: 6%
  - Some, but not enough to get a health benefit: 12%
  - None: 12%
  - Not sure: 71%
As in previous years, nearly all consumers agree that certain foods have health benefits beyond basic nutrition.

Please indicate your agreement or disagreement with this statement: “Certain foods have health benefits beyond basic nutrition.”

(2013 n=1,005)
Similar to prior years, nine in ten consumers can name at least one functional food and its associated health benefit.

What is the first food or food component that comes to mind that is thought to have health benefits beyond basic nutrition?
And, what type of health benefit (beyond basic nutrition) is that food or food component good for?

(2013 n=1,005)

Named at Least One Food and Associated Benefit

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998</td>
<td>77%</td>
</tr>
<tr>
<td>2000</td>
<td>82%</td>
</tr>
<tr>
<td>2002</td>
<td>84%</td>
</tr>
<tr>
<td>2005</td>
<td>91%</td>
</tr>
<tr>
<td>2007</td>
<td>92%</td>
</tr>
<tr>
<td>2009</td>
<td>92%</td>
</tr>
<tr>
<td>2011</td>
<td>90%</td>
</tr>
<tr>
<td>2013</td>
<td>89%</td>
</tr>
</tbody>
</table>
Fruits and vegetables are by far the most commonly mentioned functional food. The most common *specific* fruit or vegetable named is berries.

What is the **first** food or food component that comes to mind that is thought to have health benefits beyond basic nutrition? (n=1,005)

- **Fruits / Vegetables**: 56%
- **Fish / Fish oil**: 8%
- **Vitamins / Supplements**: 7%
- **Dairy**: 5%
- **Whole Grains**: 5%
- **Fiber**: 3%
- **Nuts**: 1%
- **Meat / Poultry**: 1%
- **Tea / Green Tea**: 1%
- **Herbs / Spices**: <0.5%
- **Other**: 5%
- **Don't know**: 7%

Within the **fruits / vegetables** category, a few of the most common *specific* foods mentioned include:
- Berries
- Broccoli
- Bananas
- Carrots
- Apples
The most common health benefit associated with the functional food consumers name is that it contains a particular nutrient or food component. Cardiovascular and digestive health are also benefits named.

And, what type of health benefit (beyond basic nutrition) is that food or food component good for?  
(2013 n=1,005)

- Provides specific nutrient / food component  
  (e.g., vitamins, potassium, protein)  
  - Cardiovascular health: 13%  
  - Digestive health: 10%  
  - Strengthens part of body  
    (e.g., bones, hair, eyes): 7%  
  - Cancer prevention: 6%  
  - General health / nutrition: 5%  
  - Strengthens immune system: 4%  
  - Weight maintenance: 2%  
- Other: 17%  
- Don’t know: 11%  

Examples of ‘Other’ include:  
- Cognitive health  
- Increased energy  
- Anti-aging
Consumers like the idea of foods with naturally-occurring benefits more than in fortified foods, but nearly half don’t have a preference.

All other things being equal (such as cost and taste), how much would you like the idea of getting health-promoting nutrients and food components from:

(n=1,005)

Preferences for themselves

- Like strongly: 60%
- Like somewhat: 24%
- Neither like nor dislike: 10%
- Dislike somewhat: 5%

Foods with naturally-occurring health benefits

Fortified foods

- Like strongly: 21%
- Like somewhat: 40%
- Neither like nor dislike: 23%
- Dislike somewhat: 7%
- Dislike strongly: 8%

Which is preferred?

(Rated both items, n=930)

- Naturally-occurring: 51%
- Fortified: 3%
- Tie: 46%
Interestingly, for their children, consumers tend to like the idea of each nutritional avenue more.

All other things being equal (such as cost and taste), how much would you like the idea of your children getting health promoting nutrients and food components from:

(Have children under 18, n=289)

### Preferences for their children

- **Foods with naturally-occurring health benefits**
  - Like strongly: 71%
  - Like somewhat: 18%
  - Neither like nor dislike: 7%

- **Fortified foods**
  - Like strongly: 33%
  - Like somewhat: 34%
  - Neither like nor dislike: 16%

Which is preferred?

(Rated both items, n=272)

- **Naturally-occurring**
  - 46%

- **Fortified**
  - 2%

- **Tie**
  - 51%
Half of consumers think fortified foods are more worthwhile than non-fortified foods, while only one in ten feel they are less worthwhile.

How worthwhile is it to eat fortified foods compared to foods that are not? Is it...

(n=1,005)

- Always more worthwhile than eating non-fortified foods: 11%
- Most often more worthwhile: 42%
- Most often the same: 22%
- Most often less worthwhile: 6%
- Always less worthwhile than eating non-fortified foods: 3%
- Don’t know: 17%

Consumers who are very concerned about not getting enough nutrients/healthful food components are more likely to think fortified foods are most often or always more worthwhile.
More than two-thirds like the idea of getting health promoting nutrients and food components from vitamins or supplements.

How much would you like the idea of getting health promoting nutrients and food components from:
(n=1,005)

Vitamins or supplements

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Like strongly</td>
<td>33%</td>
</tr>
<tr>
<td>Like somewhat</td>
<td>35%</td>
</tr>
<tr>
<td>Neither like nor dislike</td>
<td>17%</td>
</tr>
<tr>
<td>Dislike somewhat</td>
<td>8%</td>
</tr>
<tr>
<td>Dislike strongly</td>
<td>4%</td>
</tr>
<tr>
<td>Don't know</td>
<td>3%</td>
</tr>
</tbody>
</table>

Consumers who report they regularly eat foods with added nutrients and healthful food components are also more likely to be interested in getting these things from vitamins or supplements.
Cost is the most common barrier to more frequent consumption of health promoting foods and food components, with over half of consumers identifying this as a major reason.

To what extent, if at all, are each of the following reasons why you do not consume more health promoting foods and food components?

(n=1,005)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Major reason</th>
<th>Minor reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>These foods are sometimes more expensive</td>
<td>55%</td>
<td>32%</td>
<td>86%</td>
</tr>
<tr>
<td>You are skeptical of food manufacturers' motives for adding health components to so many products</td>
<td>34%</td>
<td>38%</td>
<td>72%</td>
</tr>
<tr>
<td>You prefer the purity of basic foods with nothing added</td>
<td>37%</td>
<td>34%</td>
<td>71%</td>
</tr>
<tr>
<td>These foods sometimes do not taste as good</td>
<td>31%</td>
<td>39%</td>
<td>70%</td>
</tr>
<tr>
<td>You are confused over conflicting information you read or hear about these foods</td>
<td>27%</td>
<td>37%</td>
<td>64%</td>
</tr>
<tr>
<td>You do not know enough about how much of these to consume for the desired health benefits</td>
<td>21%</td>
<td>42%</td>
<td>63%</td>
</tr>
<tr>
<td>You do not know enough about which foods to purchase for desired health benefits</td>
<td>23%</td>
<td>40%</td>
<td>63%</td>
</tr>
<tr>
<td>If you don't understand some aspect of a health claim that you see on a food package, you won't buy it</td>
<td>20%</td>
<td>37%</td>
<td>58%</td>
</tr>
</tbody>
</table>
Uncertainty about food preparation, getting enough already, and the mental effort required are among the least common barriers.

To what extent, if at all, are each of the following reasons why you do not consume more health promoting foods and food components?

(n=1,005)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Major reason</th>
<th>Minor reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is easier to get what you need from vitamins or supplements</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>You lack confidence in the science supporting the health benefit claims</td>
<td>18%</td>
<td>36%</td>
</tr>
<tr>
<td>It is not easy to find these foods</td>
<td>17%</td>
<td>36%</td>
</tr>
<tr>
<td>It is more certain that you will get the right amount from vitamins or supplements</td>
<td>19%</td>
<td>34%</td>
</tr>
<tr>
<td>Lack of desire to try new foods or to make changes to your regular shopping list</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>You are uncertain about how to prepare these foods</td>
<td>18%</td>
<td>31%</td>
</tr>
<tr>
<td>Your diet is already healthful enough so you do not need an extra boost from these foods</td>
<td>15%</td>
<td>33%</td>
</tr>
<tr>
<td>It takes too much mental effort to learn about and determine what foods are best to eat</td>
<td>14%</td>
<td>32%</td>
</tr>
</tbody>
</table>

On average, consumers selected 10 of the 16 reasons (whether minor or major).
Nearly two-thirds of consumers trust that functional foods will provide health benefits and have confidence that they could make the necessary changes to integrate these foods into their diet.

To what extent do you agree or disagree with the following statements regarding foods that have health benefits beyond basic nutrition?

(n=1,005)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Completely agree</th>
<th>Agree somewhat</th>
<th>Neither agree nor disagree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I trust consuming these foods will provide me with health benefits</td>
<td>21%</td>
<td>42%</td>
<td>27%</td>
<td>10%</td>
</tr>
<tr>
<td>I have confidence that I could change my diet to incorporate more of these foods</td>
<td>21%</td>
<td>41%</td>
<td>28%</td>
<td>11%</td>
</tr>
<tr>
<td>I have the skills necessary to prepare these foods in order to get the health benefits they offer</td>
<td>23%</td>
<td>35%</td>
<td>27%</td>
<td>15%</td>
</tr>
<tr>
<td>I believe that the health benefits outweigh any potential inconvenience or additional cost of these foods</td>
<td>16%</td>
<td>31%</td>
<td>35%</td>
<td>19%</td>
</tr>
</tbody>
</table>
CONSUMERS’ NUTRIENT NEEDS
PERCEPTION vs. REALITY

Consumers recognize they may be nutrient-inadequate, but there is a disconnect on what nutrients they are missing. Perceived versus actual intake of **4 out of 6** nutrients surveyed show significant discrepancies.*

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**A “FUNCTIONAL” FIX**

Foods with health-promoting nutrients, **functional foods**, provide a way for Americans to meet nutrient needs and improve health.

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*Source: IFIC 2013 Functional Foods Survey and 2010’s NHANES data. This data includes foods and supplements.

**Data surveyed is approximate.

For more information, please visit www.foodinsight.org.
• Consumers remain interested in functional foods and recognize that some foods contain health-promoting benefits.

• The majority of consumers believe they are not getting all of the nutrients and food components needed for good health, even with vitamins and supplements.

• Concern about nutrient inadequacies is moderate, with consumers primarily concerned about negative health effects in general rather than a specific health problem.

• Half of consumers recognize the value of fortified foods when compared to non-fortified foods.

• Consumers generally believe foods with naturally occurring benefits are more worthwhile than fortified foods. However, they are more likely to be interested in fortified foods for their children than for themselves.

• Barriers which might prevent Americans from consuming foods with health benefits include price, purity of food, taste, and lack knowledge of which foods and how much provide benefits.

• Knowledge, skills, self-efficacy, perceived benefits and outcome expectations were identified as behavioral determinants of functional food consumption.
QUESTIONS?

Additional IFIC Functional Foods Resources:

Functional Foods Backgrounder:

Foods for Health Video Series with Dave Grotto, RD:
Additional results from the 2013 Functional Foods Survey can be found at [foodinsight.org](http://foodinsight.org)

THANK YOU!

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Jania Matthews: [Matthews@ific.org](mailto:Matthews@ific.org)