

What Do Consumers Really Want?

International Food Information Council
Crop Production Week – Saskatoon, January 2005

What do Consumers Really Want?

**Consumer Attitudes toward
Food Safety, Nutrition and Health
in Key World Regions**

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International Food Information Council and Foundation

International Food Information Council (IFIC) and IFIC Foundation

Mission: *To communicate science-based information on food safety and nutrition issues to health professionals, media, educators and government officials.*

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

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IFIC Foundation Resources



Food Insight
Newsletter



ific.org
and
ific.org/sp

IFIC & IFIC Foundation Partners

- American Academy of Allergy, Asthma and Immunology
- National Foundation for Integrated Pest Management Education
- American Academy of Family Physicians Foundation
- National Policy and Resource Center on Nutrition and Aging, Florida Int'l University
- American College of Obstetricians and Gynecologists
- President's Council on Physical Fitness and Sports American College of Sports Medicine
- The American Dietetic Association
- Scripps Clinic and Research Foundation
- University of Illinois Functional Foods for Health Program
- Association of Women's Health, Obstetric, and Neonatal Nurses
- U.S. Department of Agriculture
- Consumer Federation of America
- The Food Allergy and Anaphylaxis Network
- U.S. Environmental Protection Agency
- U.S. Food and Drug Administration
- Food Marketing Institute
- National Association of Pediatric Nurse Practitioners, Inc.
- Institute of Food Technologists

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IFIC International Relations

The FIO Network 2005



AFIC – Asia
AFGC – Australia
CCFN – Canada
CLIA – Latin
America
EUFIC – Europe
IFIC – USA
JFIC – Japan
NZNF – New
Zealand

How are consumers feeling?



“There is too much conflicting information about which foods are healthy and which are not.”

Sixty-one percent (61%) of respondents agreed with this statement.

FMI Shopping for Health, 2001

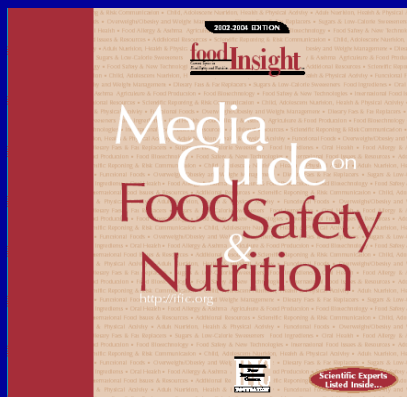
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International Advisory Committee to USDA on BSE Report 2/2/04

- Countries around the world have routinely underestimated the need for a wide variety of educational materials and training techniques to meet both technical and non-technical audiences.
- Materials should be developed in collaboration with academic, professional, trade and consumer organizations so that scientifically sound and accurate information ... can be disseminated widely.
- As traceability, transparency and access to current information increases, so does consumer confidence and effectiveness of control and prevention measures.

Helping the Media



“Thanks for the Media Guide – what a wealth of information and sources.” *Web Journalist*

“The Media Guide is an invaluable resource for our newsroom.”
Reuters Bureau Chief

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INFORMATION SOURCES

- IFIC Quantitative Surveys 1997 - 2003
- IFIC Focus Group Research
- Eurobarometer Survey of European Opinion
- Asian Food Information Centre Survey
- Various Surveys from Latin America
- “Food for Thought V” – Survey of Media Coverage of Food in Consumer Magazines

Food For Thought V Top Five Topics Of Discussion

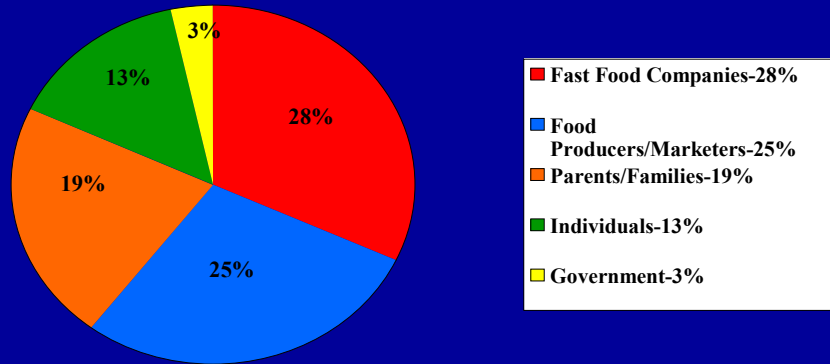
	Percentage of Discussion				
	<u>2003</u>	<u>2001</u>	<u>1999</u>	<u>1997</u>	<u>1995</u>
Obesity	15	—	—	—	—
Functional Foods	9	13	13	7	10
Disease Risk Reduction	9	9	13	8	10
Fat Intake	8	4	6	10	18
Food Biotechnology	8	12	6	—	—

Food for Thought V

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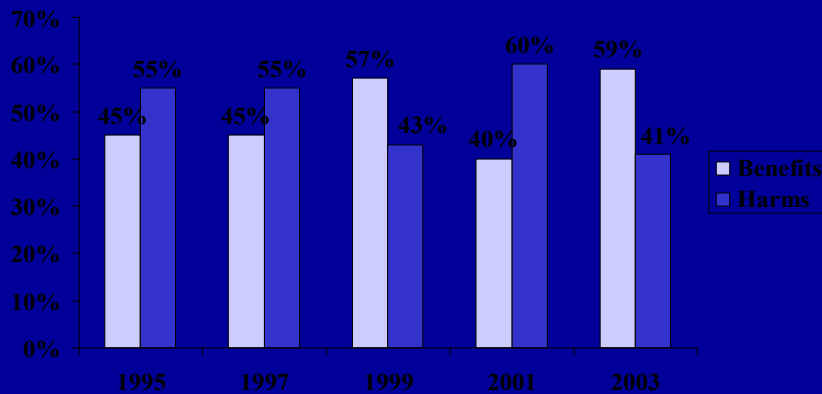
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Responsibility to Solve/Mitigate Obesity Issue



Food for Thought V

Reports of Harms vs. Benefits



Food for Thought V

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Top Sources of Harm

Percentage of Mentions

	<u>2003</u>	<u>2001</u>	<u>1999</u>	<u>1997</u>	<u>1995</u>
Trans Fatty Acids	11	2	3	—	—
Saturated Fats	10	2	2	—	—
High Fat Intake	9	2	2	4	10
High Sodium Intake	6	< 1	< 1	—	—
Foodborne Bacteria	6	19	30	29	19
Too Little Exercise	6	—	—	—	—
BSE/Mad Cow Disease	5	2	2	—	—
Alcohol	5	2	1	4	4
Overeating	5	4	2	4	—
Too Few Vitamins/Minerals	5	5	3	—	5
Metals	4	2	2	4	—
Food Biotechnology	4	17	11	—	—

Food for Thought V

Top 10 Sources of Benefit

Percentage of Mentions

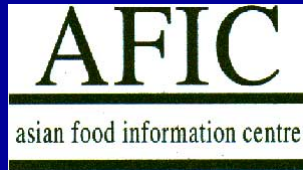
	<u>2003</u>	<u>2001</u>	<u>1999</u>	<u>1997</u>	<u>1995</u>
Consume Functional Foods	23	22	20	18	14
Physical Activity	14	—	—	—	—
Eat Fruits and Vegetables	8	15	11	9	11
Eat Nutritious Meals	6	2	3	—	—
Eat Foods Rich in Vitamins/Minerals	6	5	11	10	11
Increase Unsaturated Fat Intake	5	3	2	—	—
Eat Less Food	5	1	1	—	—
Eat Fewer Carbohydrates	4	< 1	< 1	—	—
Moderate Alcohol Intake	4	2	< 1	—	—
Decrease Fat Intake	4	4	5	7	8

Food for Thought V

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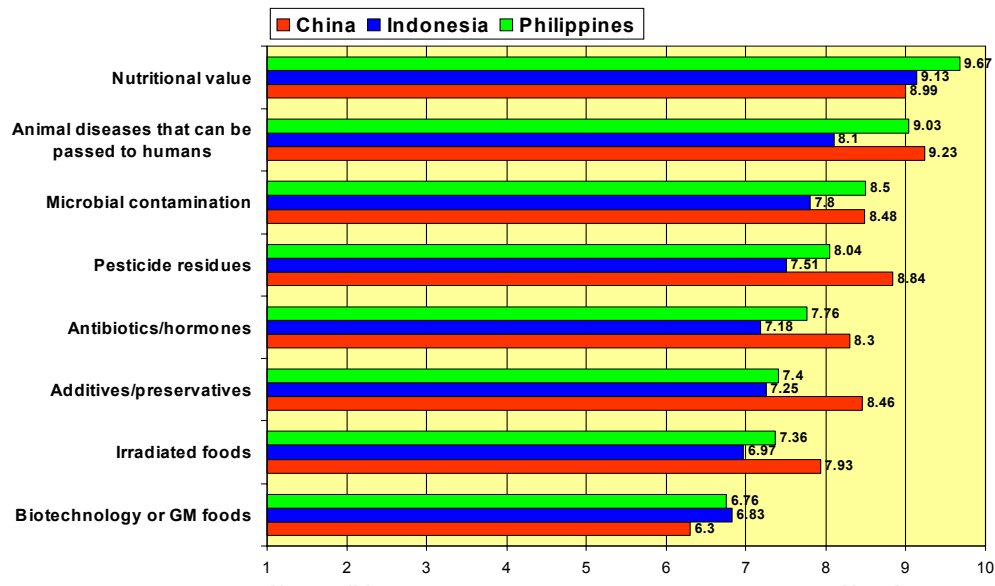
Consumer Perceptions of Food Biotechnology in Asia



Public Report on the Asian Food Information Centre 2002 Consumer Survey

Prepared: February 2003

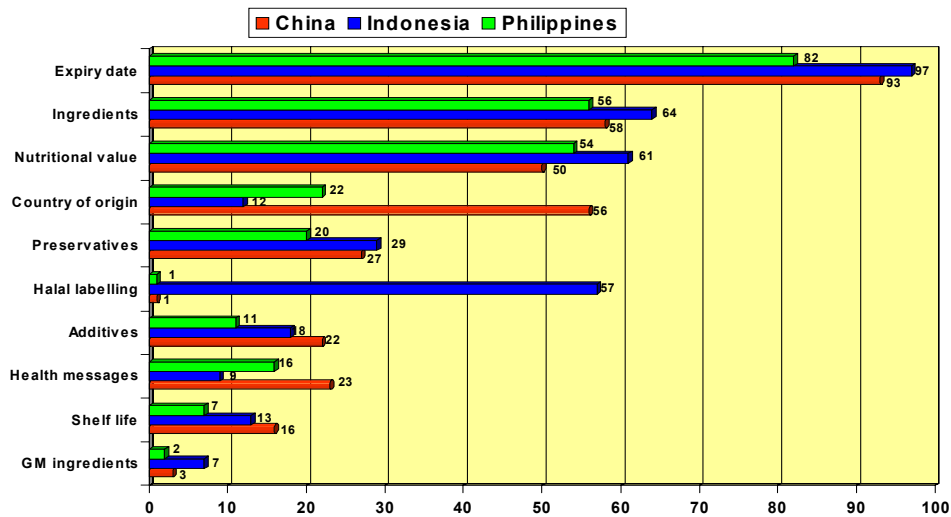
Concerns about food Importance rating – Mean Scores



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Specific items checked in food labels



(Q4c)
Base: All who ever checked food labels (573)

Latin America Areas of concern and/or misinformation

- Biotech
- Low – calorie sweeteners
- Pesticides
- Food additives
- Negative public dispositions, fueled by activists
 - Concern over health, safety, environment
- Great need for reliable information to make an informed judgment

IFIC Media Monitoring: Independent Surveys

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What is Public Perception?

Public perception IS

- The overriding view on an issue or issues, held by the vast majority of a given population.

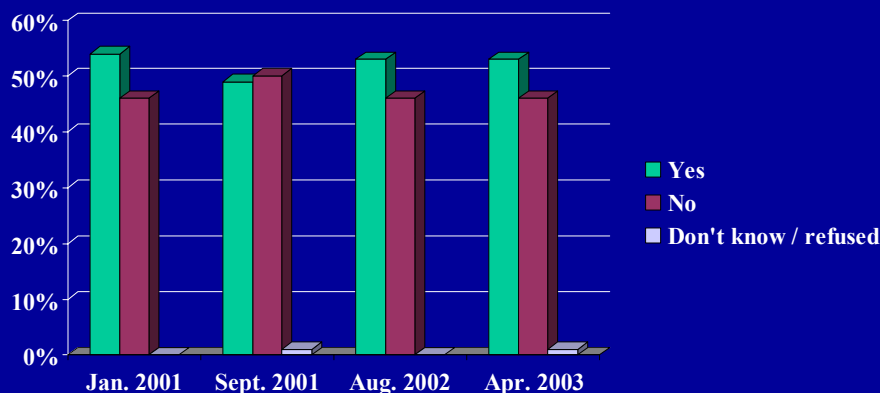
Public perception is NOT necessarily

- Consistent from country to country.
- What a particular interest group or opinion leader says it is!

Public perception CAN BE

- determined by research, or
- approximated by methodical evaluation.

Are there any foods or ingredients that you have avoided or eaten less of?



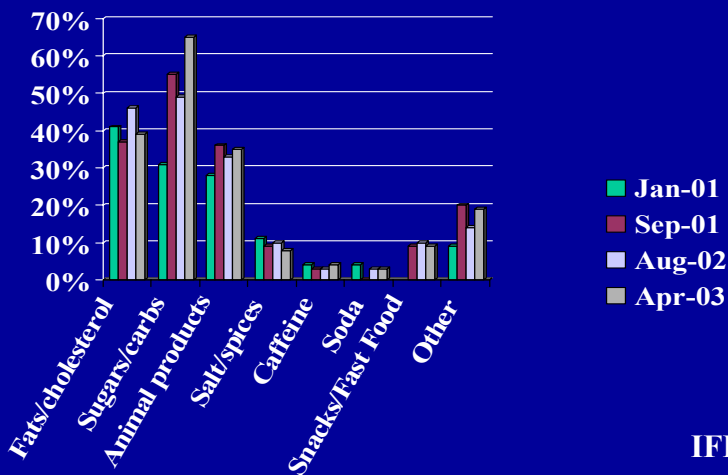
IFIC 2003

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If yes, what foods or ingredients did you avoid or eat less of?

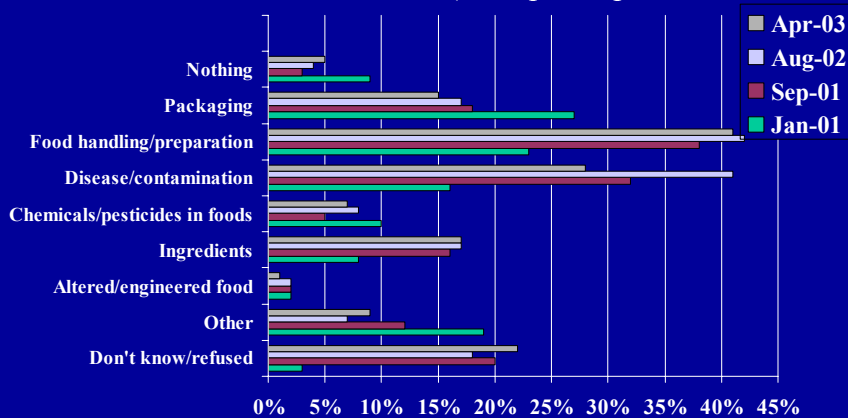
(Multiple responses allowed)



IFIC 2003

What, if anything, are you most concerned about when it comes to food safety?

(Multiple responses allowed, n = 1000)

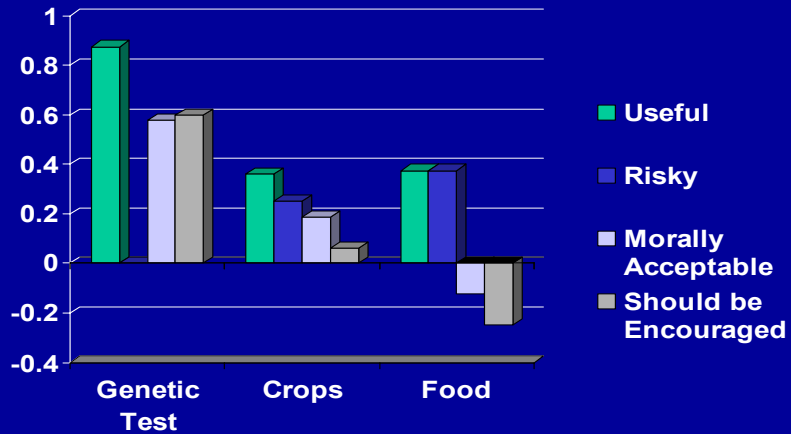


IFIC 2003

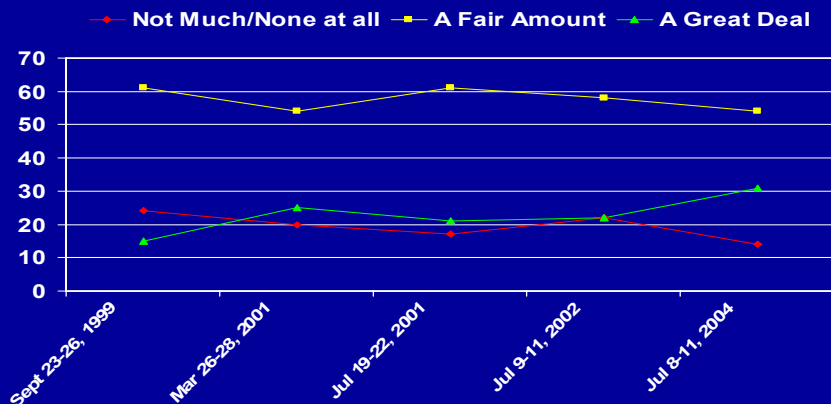
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European Attitudes to Applications of Biotechnology in 2002



U.S. Confidence in Safety of Food Supply



Source: Ipsos Global Express Survey
May/June 2004

IFIC 2004

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EU - Trusted Information Sources

	<u>1999</u>	<u>2002</u>
• Consumer organizations	55%	49%
• The medical profession	53%	54%
• Environmental organizations	45%	46%
• Universities	26%	33%
• Animal protection organizations	25%	26%
• Television and newspapers	20%	23%
• Farmer Organizations	-	13%
• International institutions (not companies)	17%	17%
• National government	15%	14%
• A specific industry	4%	5%
• Religious organizations	9%	8%
• Political parties		3%

EUROBAROMETER

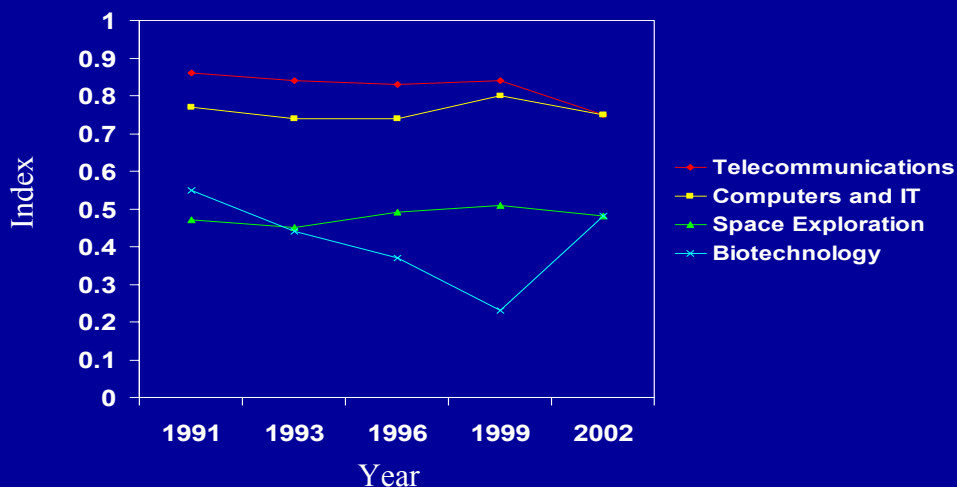
Factors Affecting Consumer Attitudes

-
- **Awareness**
 - **Information Sources**
 - **Education**
 - **Trust**
 - **Perceptions on Food Safety**
 - **Terminology**
 - “Biotechnology” – not “GMO”

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European Optimism About Technologies (1991-2002)



Global Confidence in Safety of Food Supply

•Some countries feel their food supply is as safe or safer than 10 years ago:

U.S.A., Italy, Spain

•Some countries express increased levels of concern over the safety of their food supply:

Mexico, Russia, China, Japan, South Korea, Taiwan

Source: Ipsos Global Express Survey
May/June 2004

IFIC 2004

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Consumer Confidence in Food Safety Makes a Big Difference

USA - domestic beef sales are little affected by discovery of one case of BSE

Japan – beef consumption drops 50% in five months following several cases of BSE

Food Safety Developments

AP News, 1-03-2005

Canada Confirms Second Case of Mad Cow!

- **Canada on Sunday confirmed its second case of mad cow disease, just days after the United States said it planned to reopen its border to Canadian beef.**

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Differing Priorities in Food Security

USA and Canada

- protecting the food supply from tampering, contamination or bioterrorism

Africa and Parts of Asia

- having enough food to survive

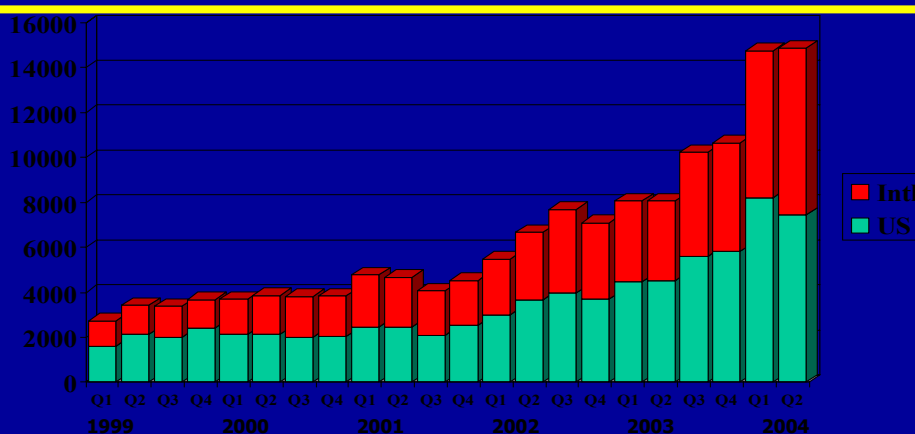
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Obesity is an International Issue

- “For the first time in history, the majority of adults (worldwide) are overweight”
International Congress on Obesity, 1998
- “Obesity influences many other health related issues, including heart disease, stroke, osteoarthritis, certain cancers and diabetes.”
World Health Organization

Global Trends in Obesity-Related Media Coverage



Note: Figures retrieved from Lexis-Nexis searches on "obesity or obese" in U.S. and international newspapers and newswires.



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Obesity is an International Issue

Globally, consumer, media and regulatory focus has increased on:

- Dietary fats and fat replacers
- Sugars and sweeteners, high fructose corn syrup
- “Addictive” properties of foods
- Health claims, food safety labeling, calorie labeling
- Physical activity, dietary guidelines, education
- Marketing practices, advertising to children
- Fat taxes, anti-sugars advocacy
- Functional foods

Canada Addresses the Obesity Issue

- **September 2004 ban on high fat/calorie foods and beverages in school vending machines**
- **Ban on use of “low-carb” labeling on food products**
 - compliance by large companies in 2005
 - small company compliance deadline 2007

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New AICR Survey Shows Overwhelming Support for “Common-Sense” Weight Management

- **4 in 5 weight-conscious Americans turn to salads, vegetables and fruits when trying to shed a few pounds.**
- **The survey results reflect findings from other recent surveys that low-carb dieting may be on the wane – or perhaps was never truly the widespread phenomenon its food industry proponents hoped it would be.**

American Institute for Cancer Research, January 05

Obesity is an International Issue

Alternative responses by the food sector:

- **Changing formulations, production processes, packaging and promotion**
- **Emphasizing that a balanced overall diet is more important than the nutrition profile of individual foods and beverages**
- **Functional foods!**

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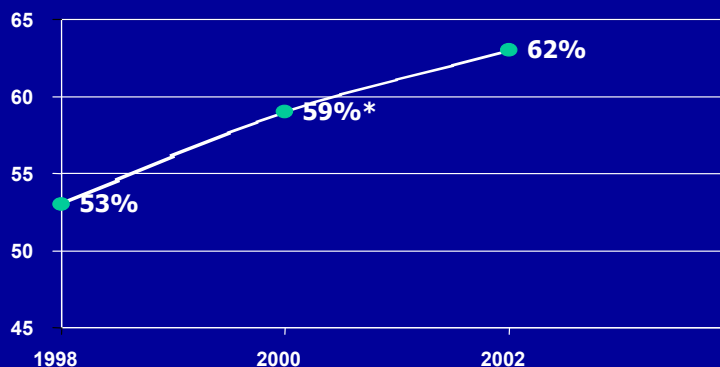
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Functional Foods

- Functional foods are foods that may provide a health benefit beyond basic nutrition ... from fruits and vegetables to fortified or enhanced foods. *- IFIC*
- Functional foods have been associated with treating and reducing the risk of cancer, diabetes, cardiovascular disease, hypertension, neural tube defects, osteoporosis, abnormal bowel function and arthritis. *- The American Dietetic Association*
- “Functional foods have the potential to alleviate key global health concerns.” *- WHO 1998*

Consumption Changes: 1998 - 2002

Percentage who are eating at least one food for its functional health benefits



* Significant increase from previous study ($p < .05$)

IFIC 2002

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Consumer Awareness of Foods That May Reduce Risk of Disease

TOP TEN RESPONSES (unaided) :

1. Broccoli (9%)
2. Fish, fish oil, seafood (9%)
3. Green, leafy vegetables (9%)
4. Oranges, orange juice (9%)
5. Carrots (8%)
6. Garlic (7%)
7. Fiber (6%)
8. Milk (6%)
9. Oats/oat bran/oatmeal (6%)
10. Tomatoes (6%)

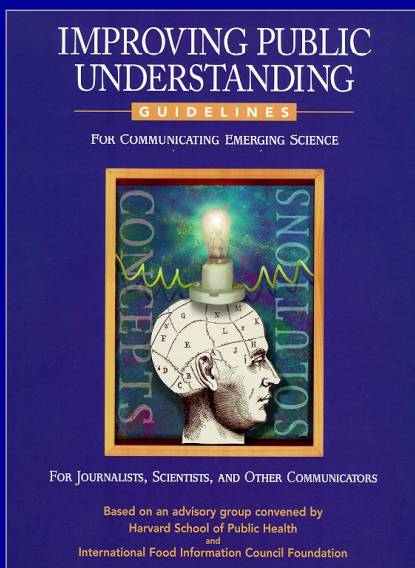
IFIC 2002

Functional foods Growing Global Interest

- Australian government allocates \$5.5 million for commercial development of functional foods (July 2003)
- Latin America - rapid rise in consumption of herbal remedies and health foods in (Fredonia Group, 1999)
- Asia – functional foods was the most frequently occurring topic in coverage of nutrition and health in consumer magazines (AFIC, April 2002)
- USA – similar findings by IFIC in 1999 survey
- Concept of “Nutrigenomics”/personalized nutrition emerges in USA and Europe

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Communicate Food-Related Science in Ways that Serve Both Public Understanding and the Objectives of the Communicators

- Journal of the National Cancer Institute—February 4, 1998
- Journal of the American Medical Association—February 11, 1998

Evolution of An Issue

