



# 2013 FUNCTIONAL FOODS CONSUMER SURVEY

**IFIC**  
International  
Food  
Information  
Council



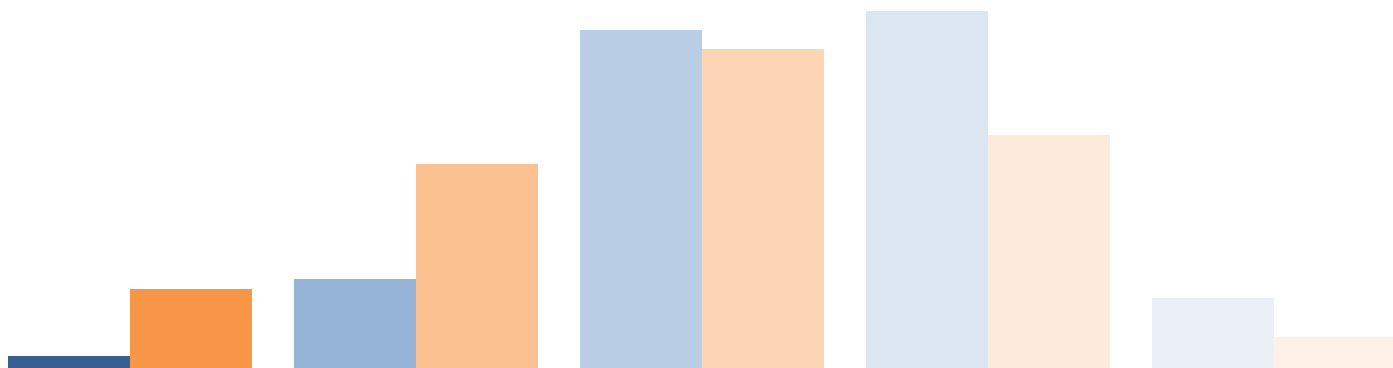
# Methodology

- 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.

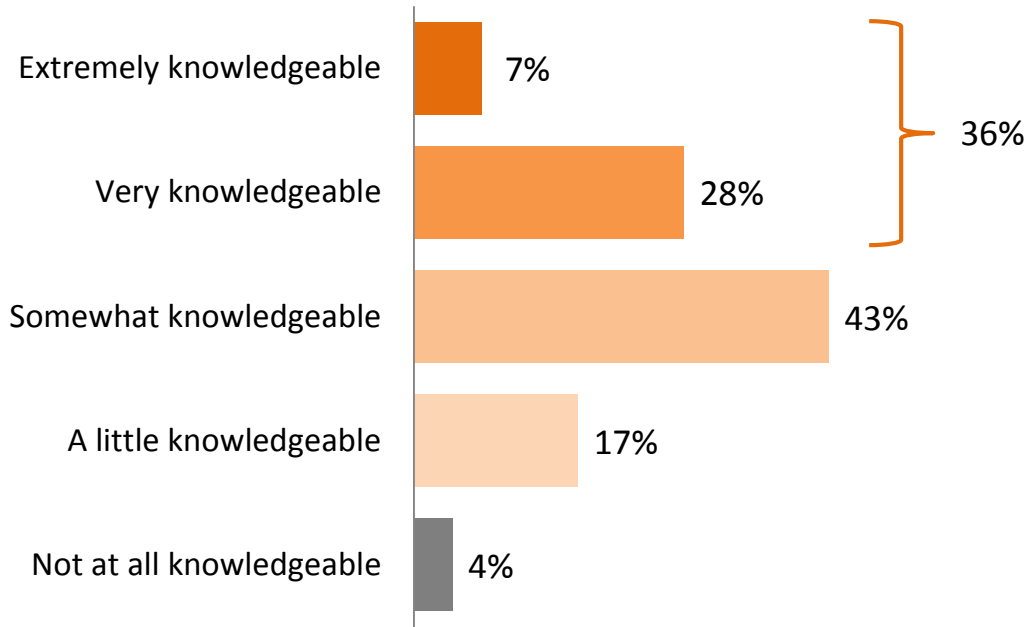
Percentages less than 4% may not appear with statistic on graphs.



# RESULTS

# Over one-third of consumers state that they are at least *very knowledgeable* about nutrition.

How knowledgeable do you consider yourself in the area of nutrition?  
(n=1,005)



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

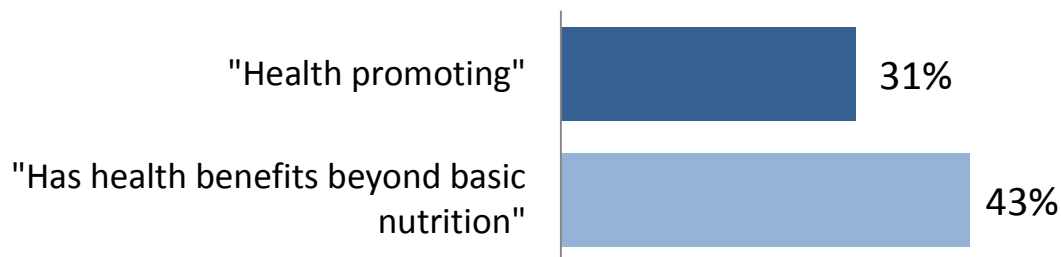
The same is true for consumers who **strongly agree that certain foods contain health benefits** beyond basic nutrition.

“Beyond basic nutrition” rates more highly than “health promoting” to convey that a food or food component is good for one’s health. However, half of consumers rate both phrases equally.

How well do the following phrases convey that a particular food or food component is good for your health and/or reduces risk of disease? (1=Not at all, 7=Extremely well)

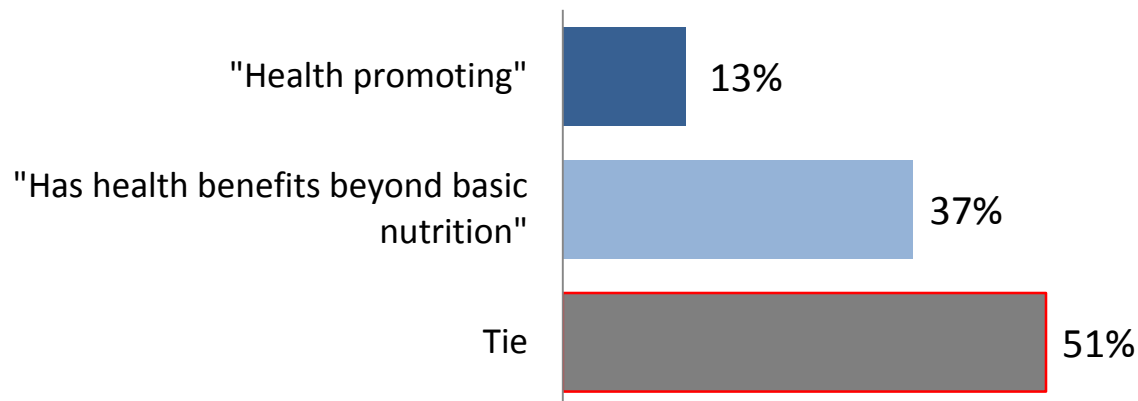
(n=1,005)

% Very Well (Rating = 6-7)



**All subgroups** examined appear to give a higher rating to the “beyond basic nutrition” phrase.

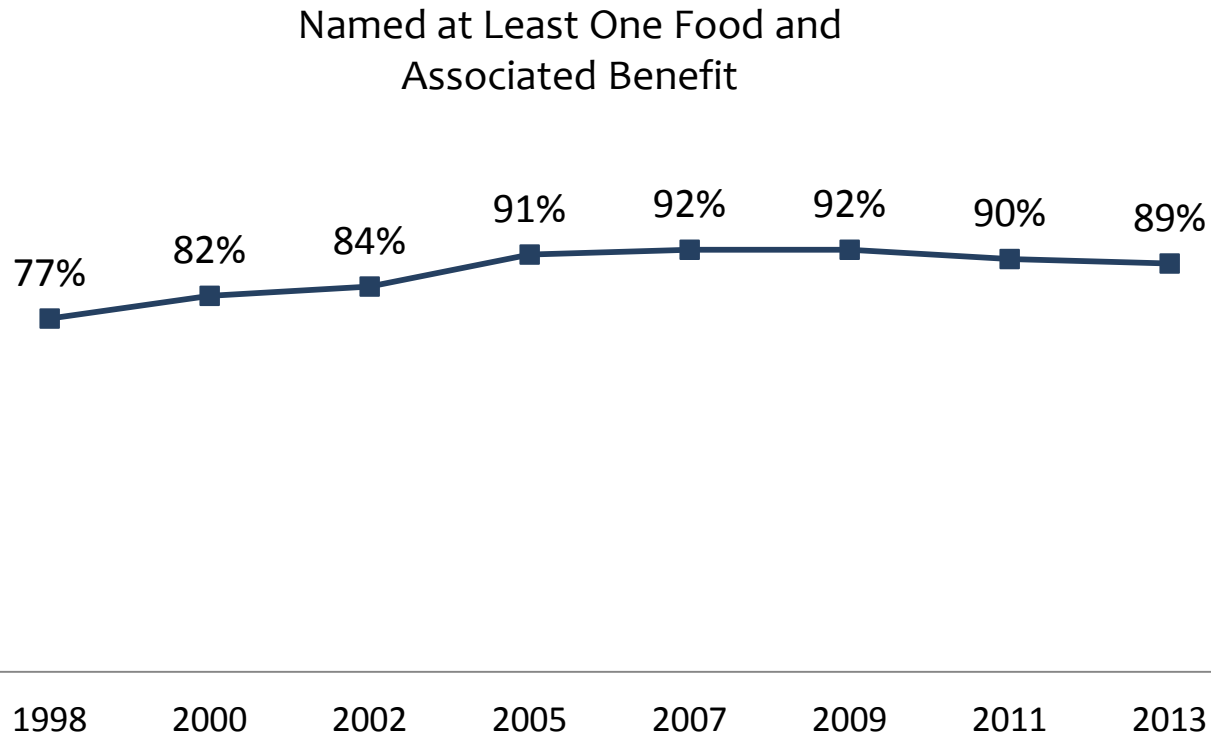
Which is preferred?



# 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?

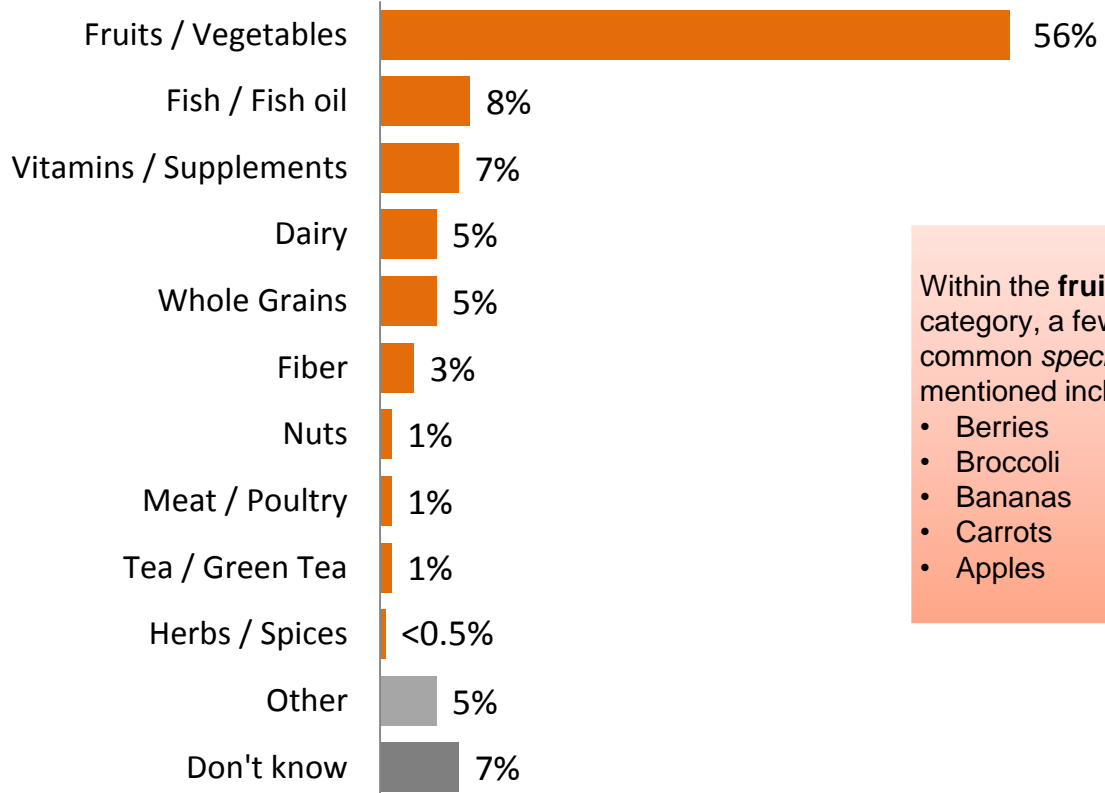
And, what type of health benefit (beyond basic nutrition) is that food or food component good for?  
(2013 n=1,005)



# 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)

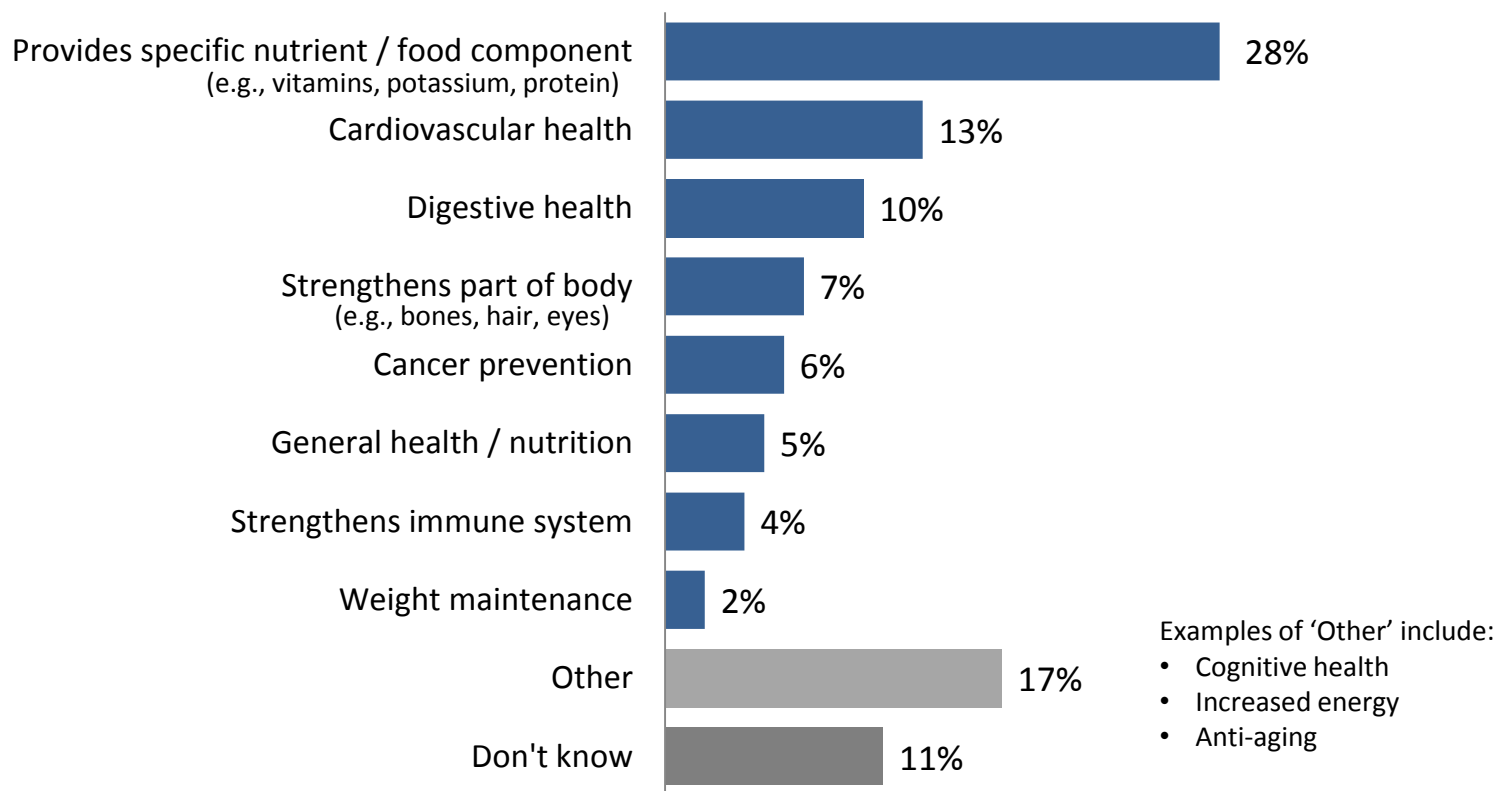


Within the **fruits / vegetables** category, a few of the most common *specific* foods mentioned include:

- 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.

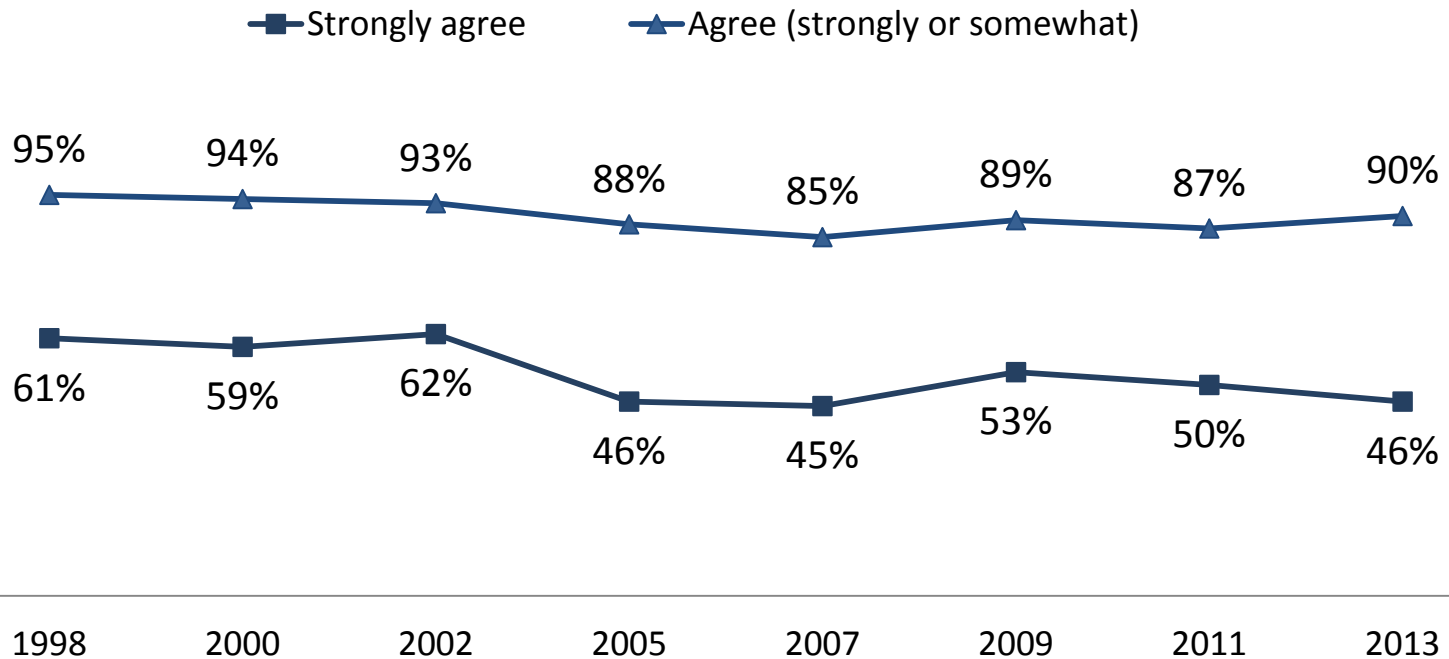
And, what type of health benefit (beyond basic nutrition) is that food or food component good for?  
(2013 n=1,005)





# As in previous years, nearly all consumers agree that certain foods have health benefits beyond basic nutrition.

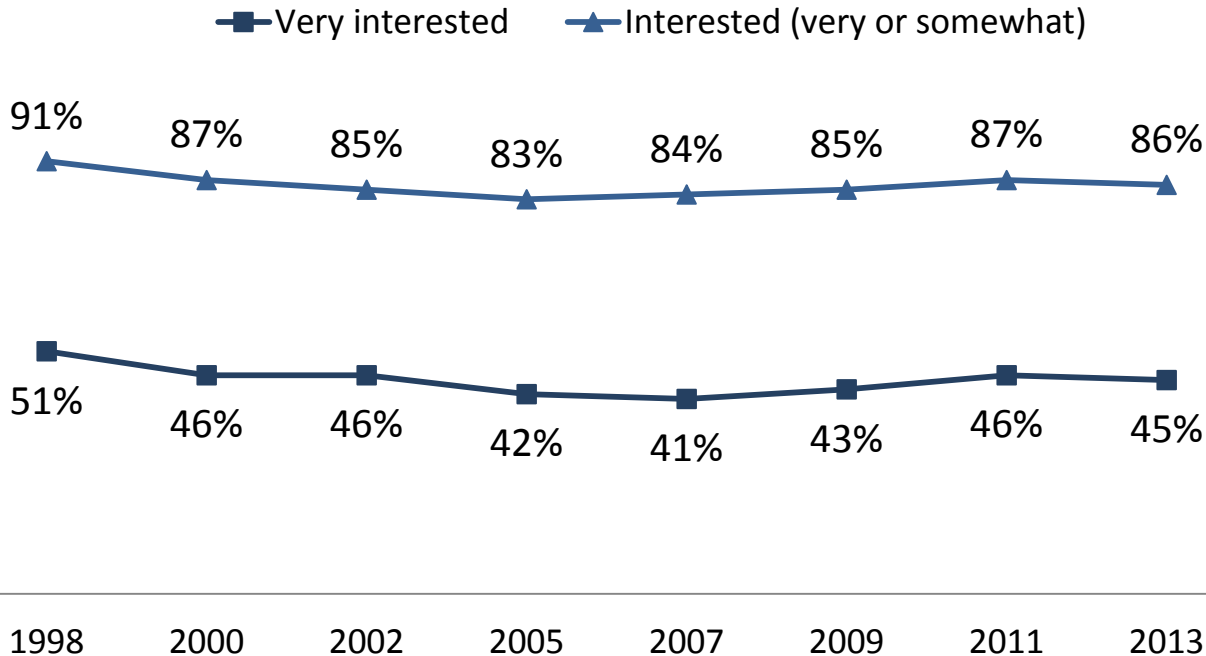
Please indicate your agreement or disagreement with this statement:  
“Certain foods have health benefits beyond basic nutrition.”  
(2013 n=1,005)



# Interest in learning more about these foods has also remained stable.

In general, how interested are you in learning more about foods that have health benefits beyond basic nutrition?

(2013 n=1,005)

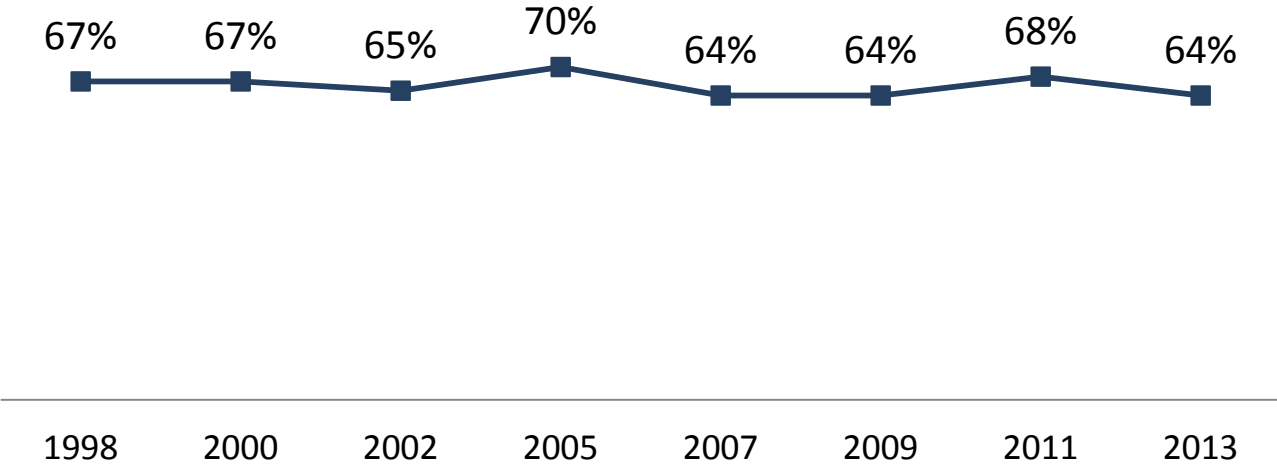


**Healthier consumers**  
(in terms of both BMI and a subjective rating) are more interested in learning more about these foods.

# Consistent with prior results, two-thirds of consumers report they take vitamins or supplements regularly.

Do you take any vitamins, minerals, herbal supplements, or other dietary supplements regularly (i.e., three or more times per week)?  
(2013 n=1,005)

Percentage Yes

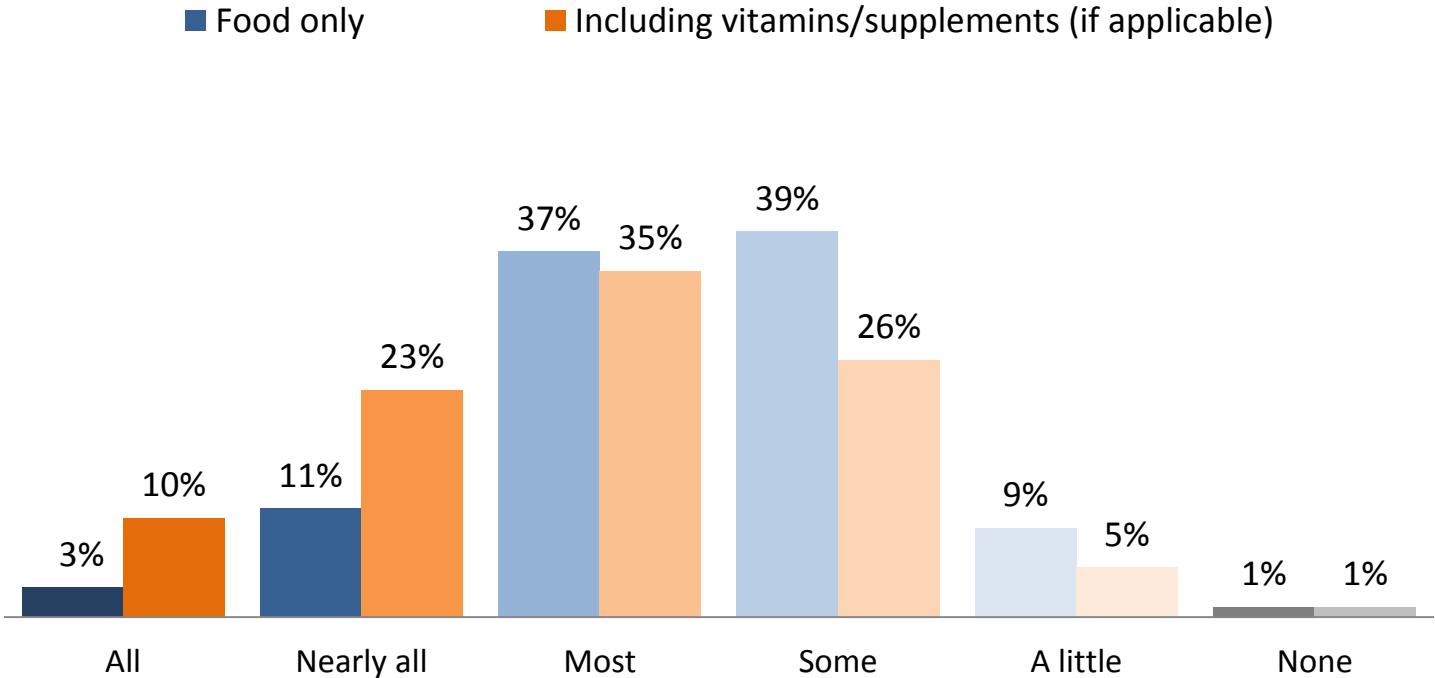


**Older** consumers, consumers with **more education**, and those with **higher incomes** are all more likely than their counterparts to take vitamins or supplements regularly.

# 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?

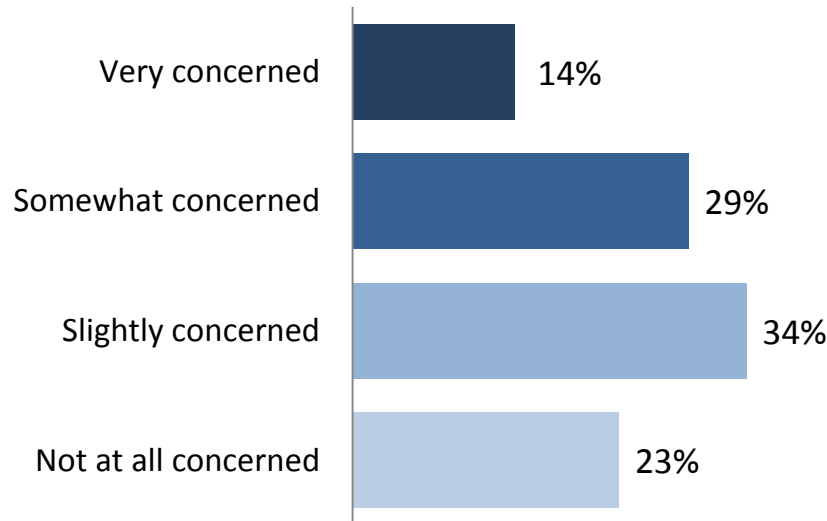
(n=1,005)



# 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\*)



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

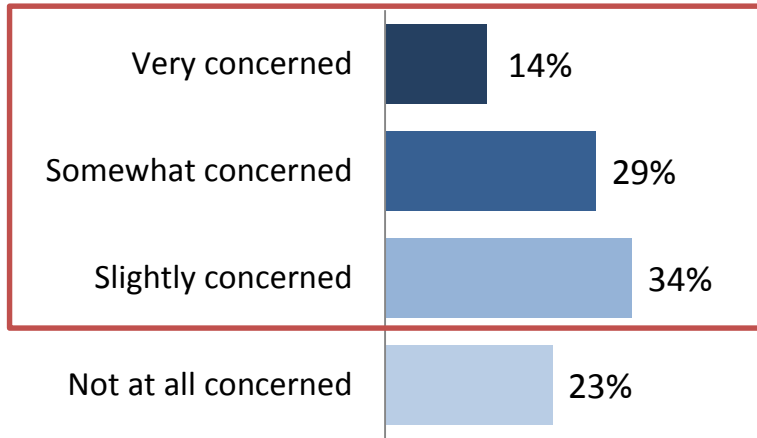
**Women** are more likely than men to be *very* or *somewhat* concerned.

**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.

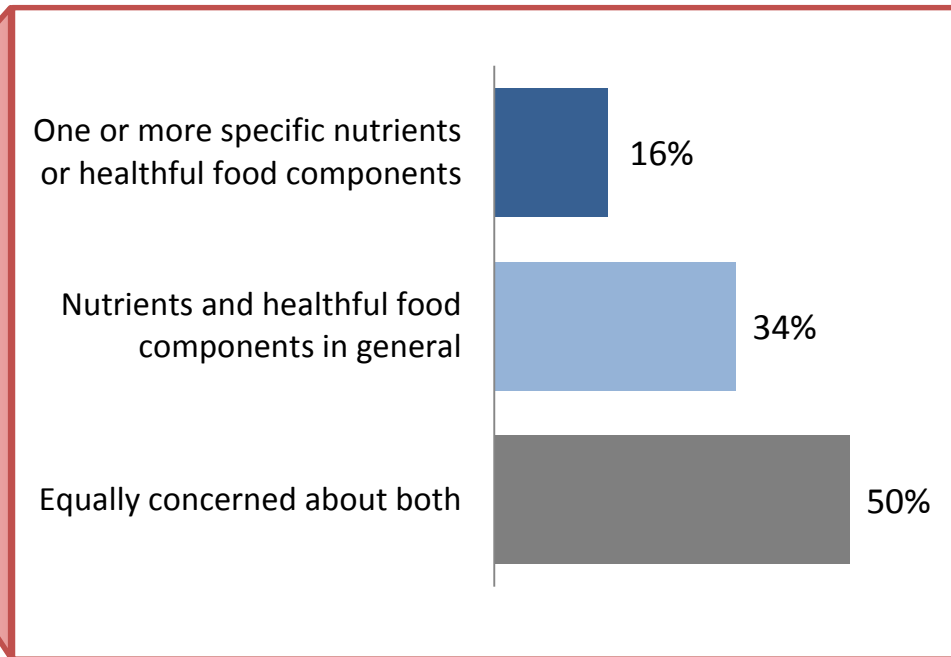
\*Those who indicated that they get all needed nutrients/food components were automatically coded as *not at all concerned*.

# Two-thirds of concerned consumers report concerns, at least in part, about not getting enough of one or more specific nutrients. A larger share have more general concerns.

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)

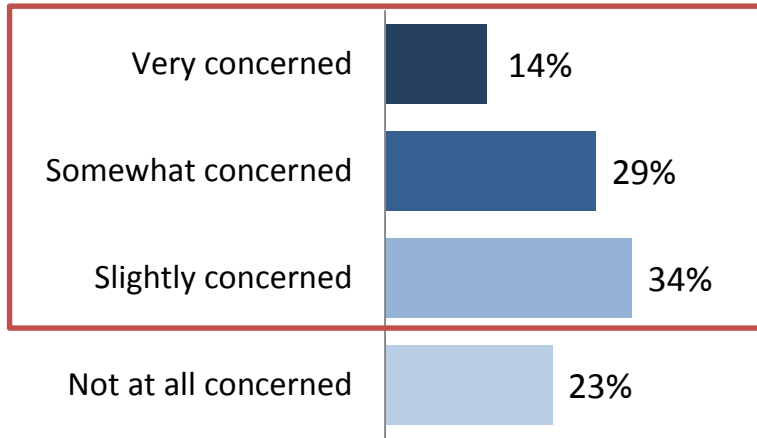


Which are you more concerned you are not getting enough of?  
(At least slightly concerned, n=774)

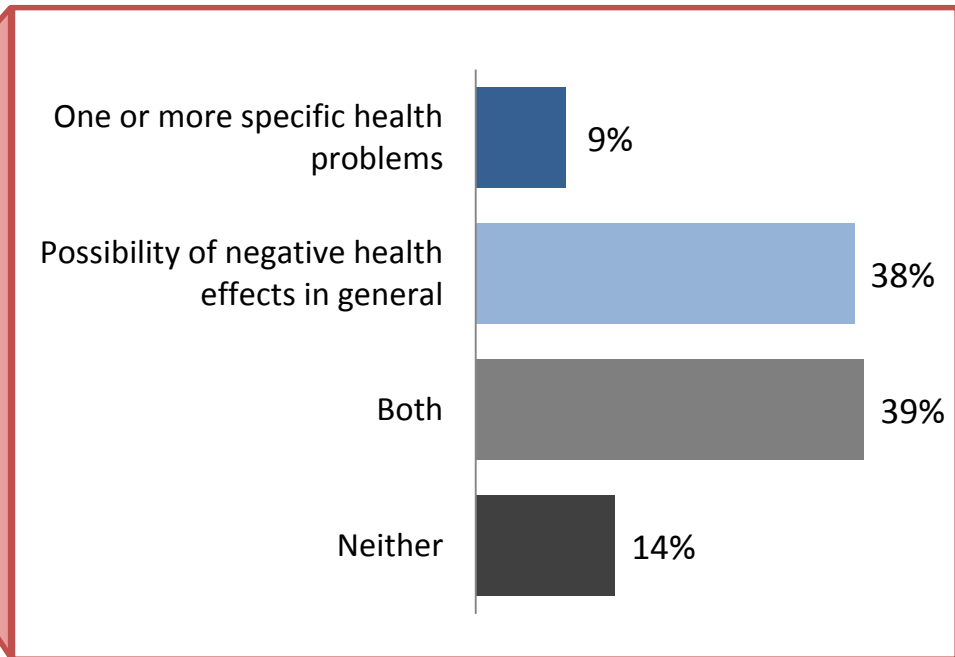


Similarly, nearly half of concerned consumers are concerned about one or more specific health problems, although general health concerns are much more prevalent.

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)

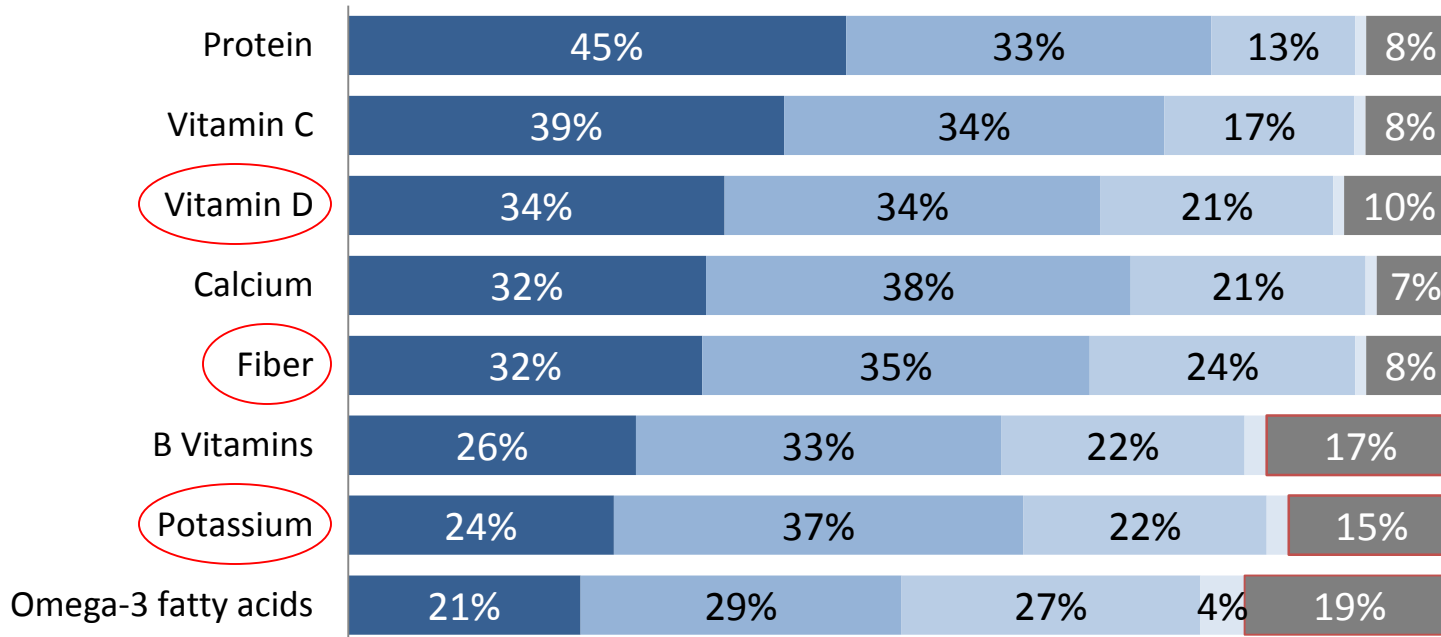


When you said you were concerned about not getting all of the nutrients and other healthful food components, did you have in mind...  
(At least slightly concerned, n=774)



# 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)



**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

- Enough to get a health benefit beyond my minimum needs
- Just enough to meet my needs
- Some, but not enough to meet my needs
- None
- Not sure

**% of Americans meeting DRI (NHANES 2003-06)**

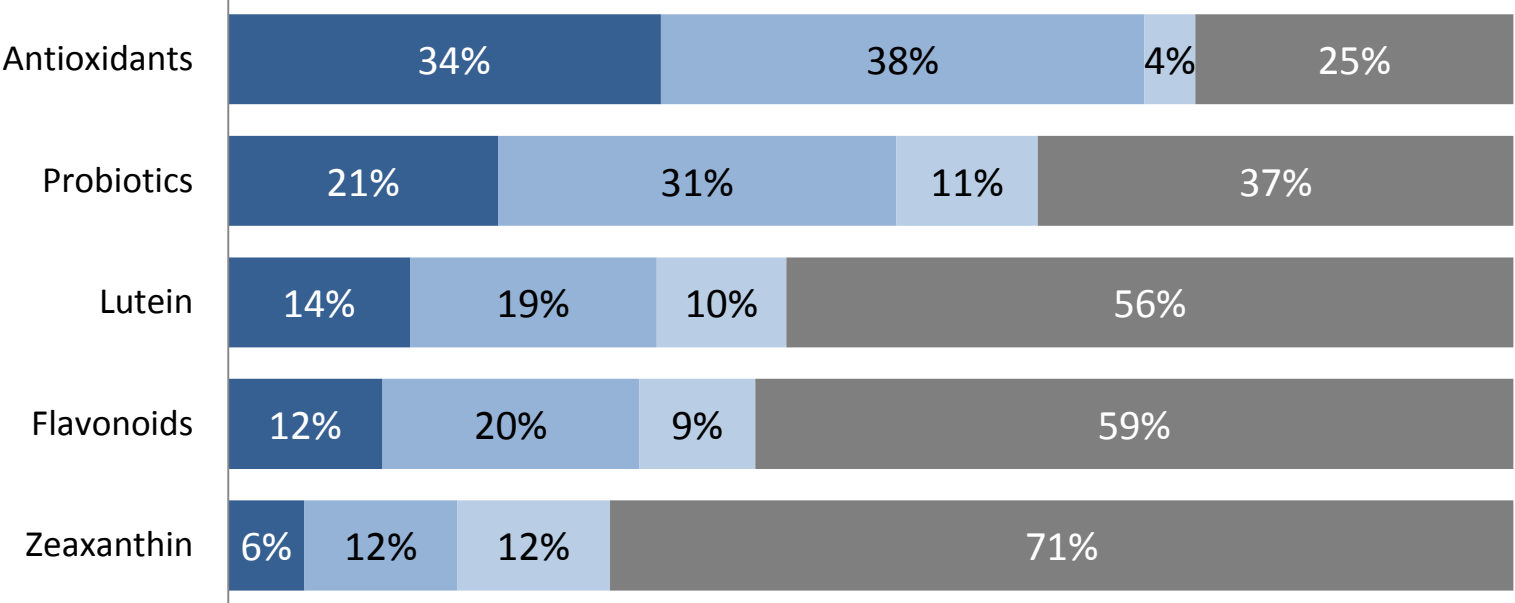
- Vitamin D: 32%
- Fiber: 5%
- Potassium: <3%



# 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.

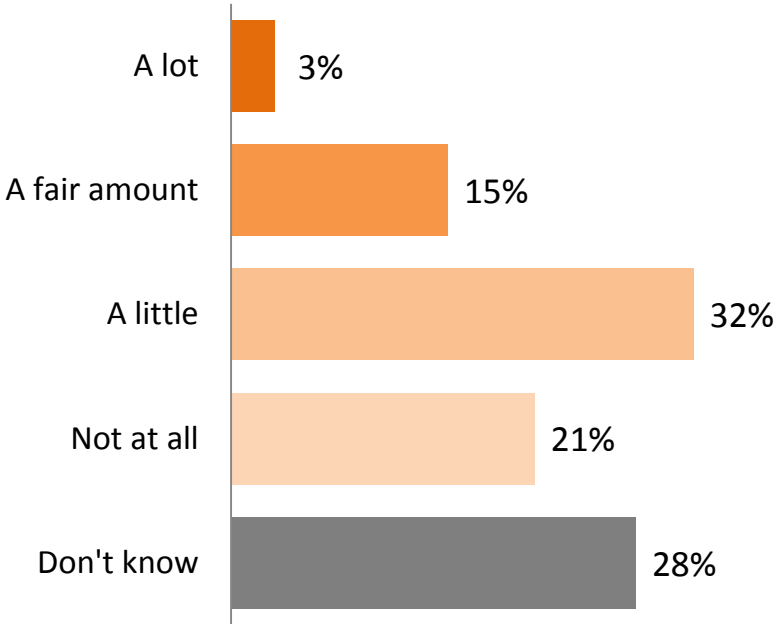
How much would you say you get of each of the following?  
(n=1,005)

■ Enough to get a health benefit ■ Some, but not enough to get a health benefit ■ None ■ Not sure



# Half of consumers think fortification has little to no impact on taste. One-quarter do not know how it affects taste.

Typically, how much—if at all—does fortification change the taste of food?  
(n=1,005)

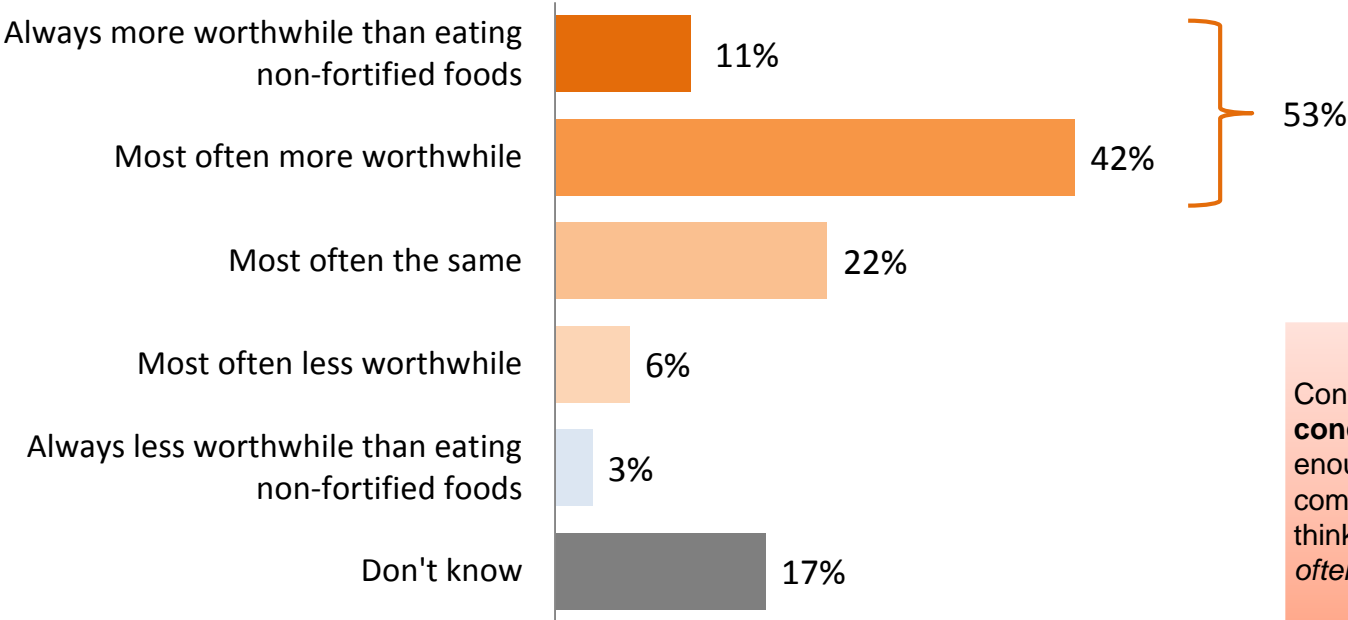


**Younger** consumers are more likely to think that fortification changes the taste of food at least *a fair amount*.

In contrast, a full third of consumers ages 65-80 report that fortification does not change the taste of food at all.

# 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)



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*.

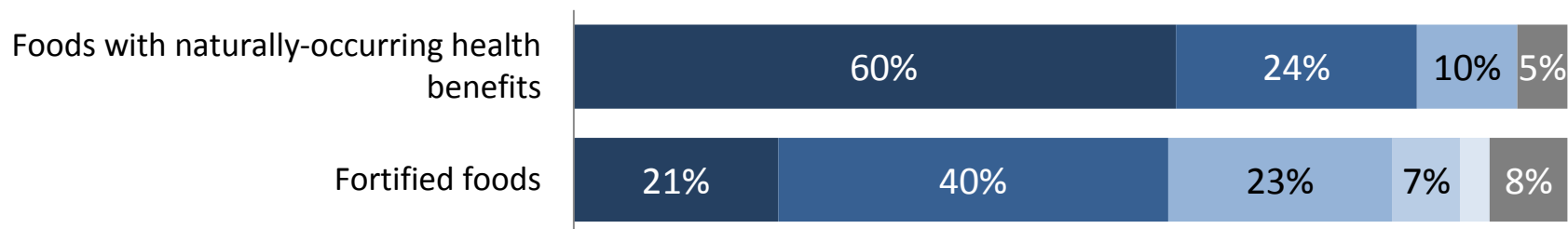
# Consumers like the idea of foods with naturally-occurring benefits more than in fortified foods, but nearly half don't have a preference.

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:

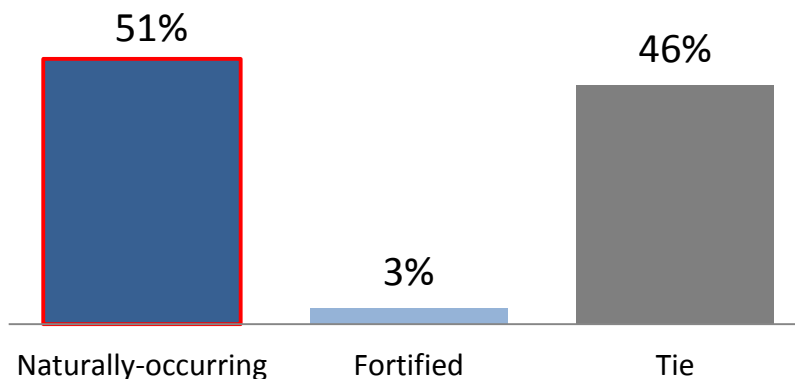
(n=1,005)

## Preferences for themselves

■ Like strongly ■ Like somewhat ■ Neither like nor dislike ■ Dislike somewhat ■ Dislike strongly ■ Don't know



Which is preferred?  
(Rated both items, n=930)



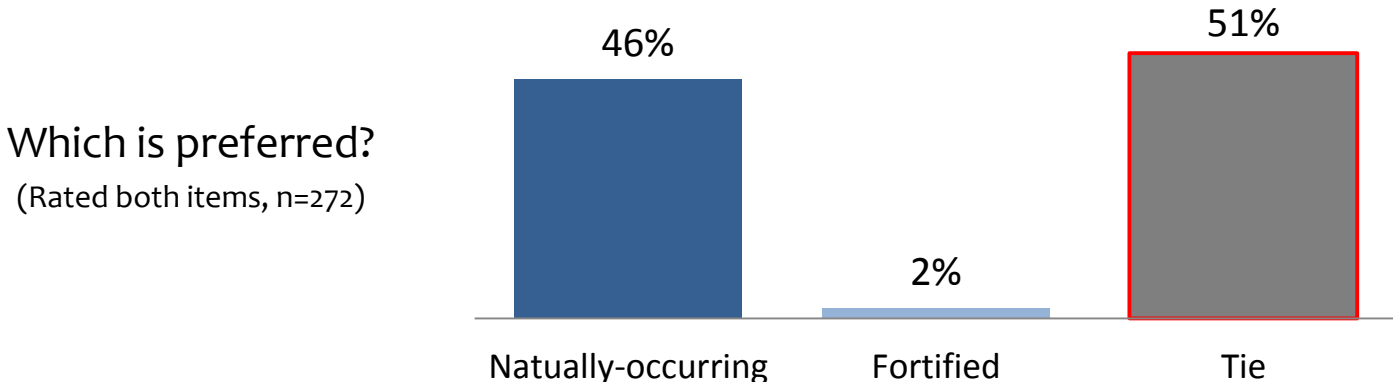
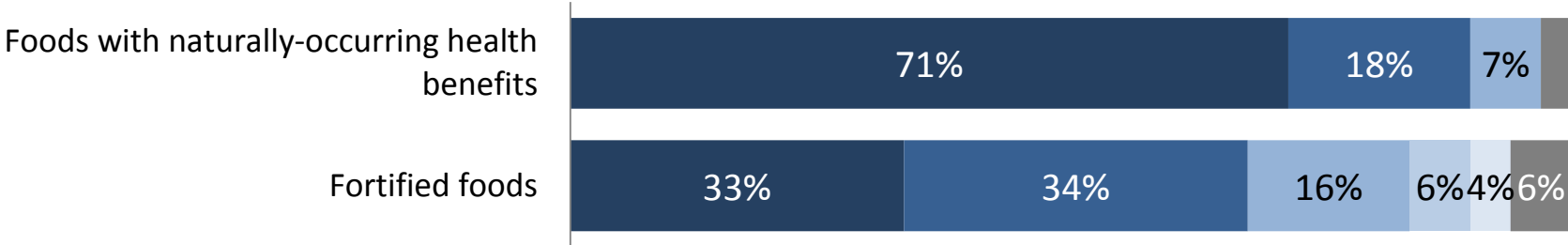
# Interestingly, for their children, consumers tend to like the idea of each nutritional avenue more.

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

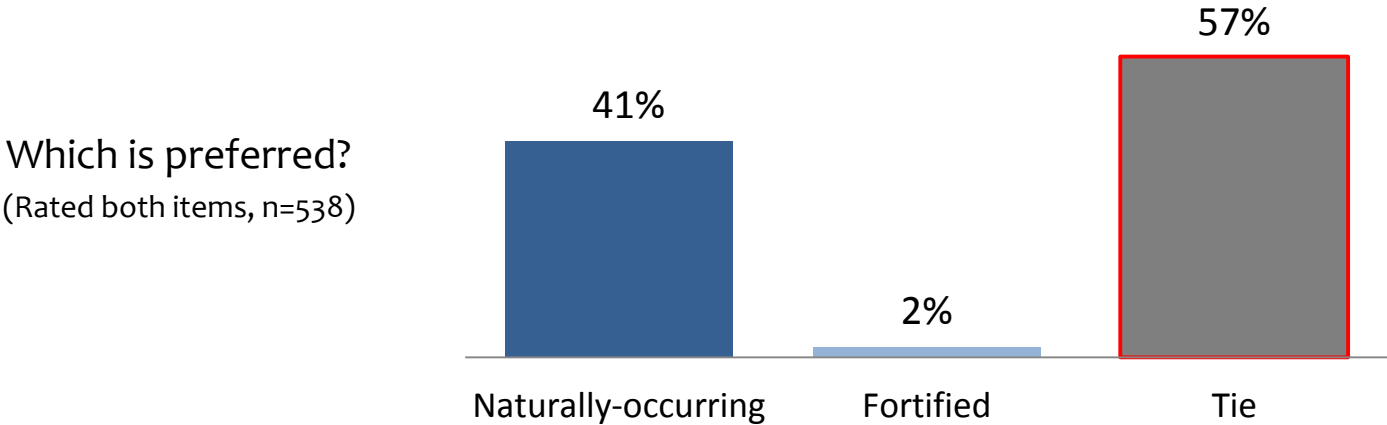
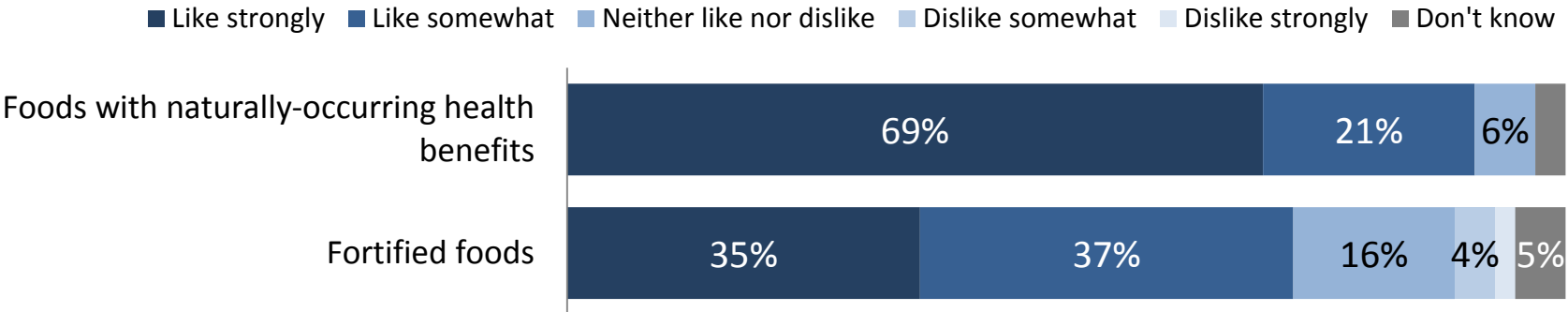
■ Like strongly ■ Like somewhat ■ Neither like nor dislike ■ Dislike somewhat ■ Dislike strongly ■ Don't know



# For parents/seniors, consumers still like the idea of both nutritional avenues and are even more likely to have a tie in ratings for the two.

All other things being equal (such as cost and taste), how much would you like the idea of your parents or any senior-aged persons getting health promoting nutrients and food components from:  
 (Buys groceries and/or prepares meals for parents/seniors, n=568)

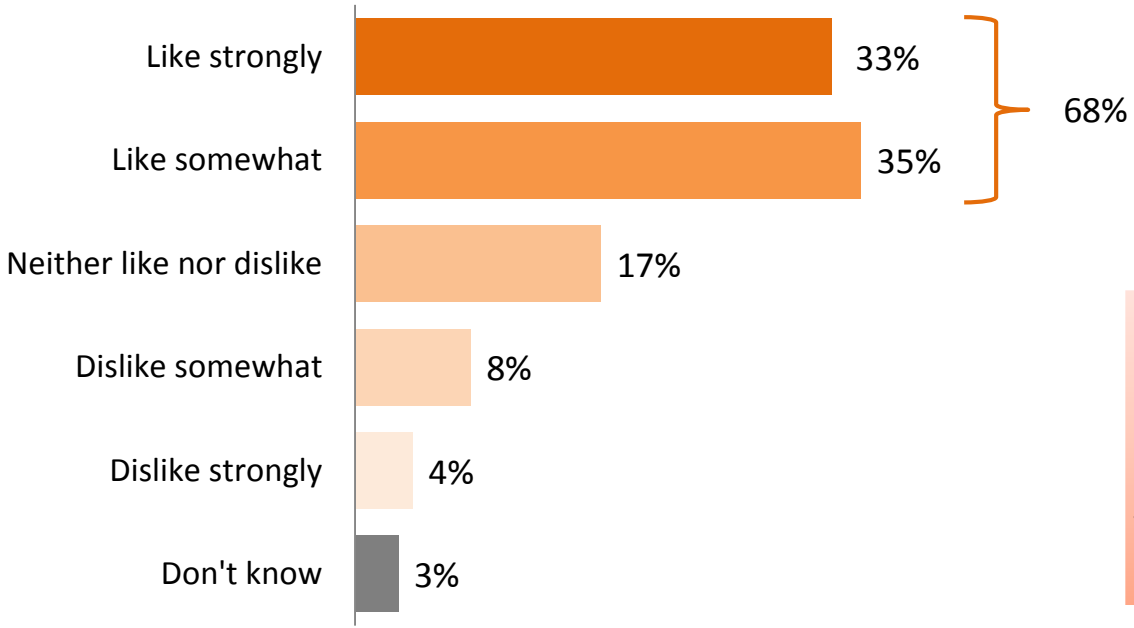
## Preferences for parents/seniors



# 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

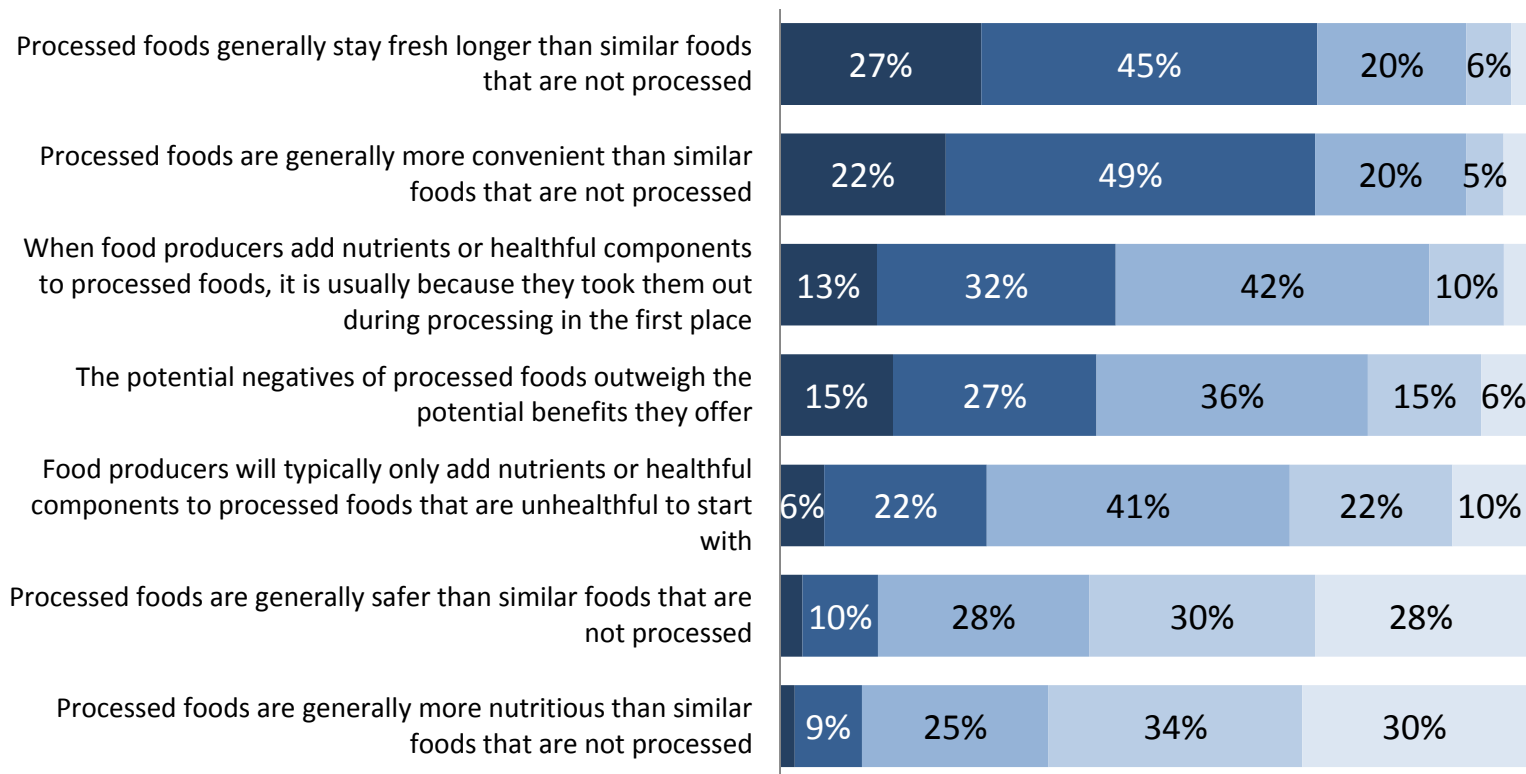


Consumers who report they **regularly eat foods with added nutrients and healthful food components** are also more likely to be interested in getting these things from vitamins or supplements.

# Most consumers agree that processed foods are more convenient and stay fresh longer compared to similar foods that are not processed, but do not believe they are safer or more nutritious.

To what extent do you agree or disagree with the following statements?  
(n=1,005)

■ Agree strongly  
 ■ Agree somewhat  
 ■ Neither agree nor disagree  
 ■ Disagree somewhat  
 ■ Disagree strongly

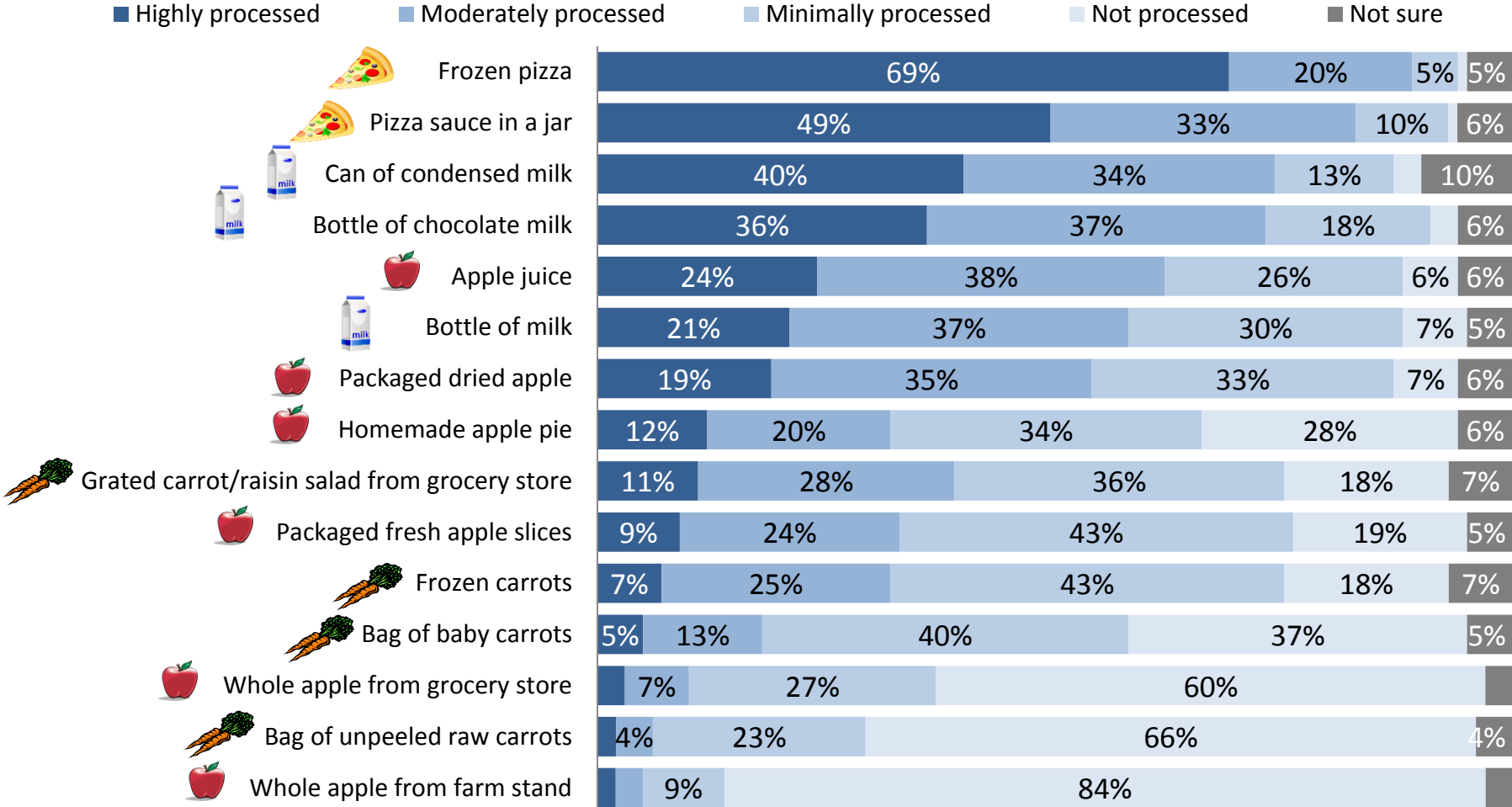


Consumers who frequently consume foods with added nutrients / components are more likely to agree that processed foods are generally safer and more nutritious.



# Consumers appear to recognize even minimal processing as processing.

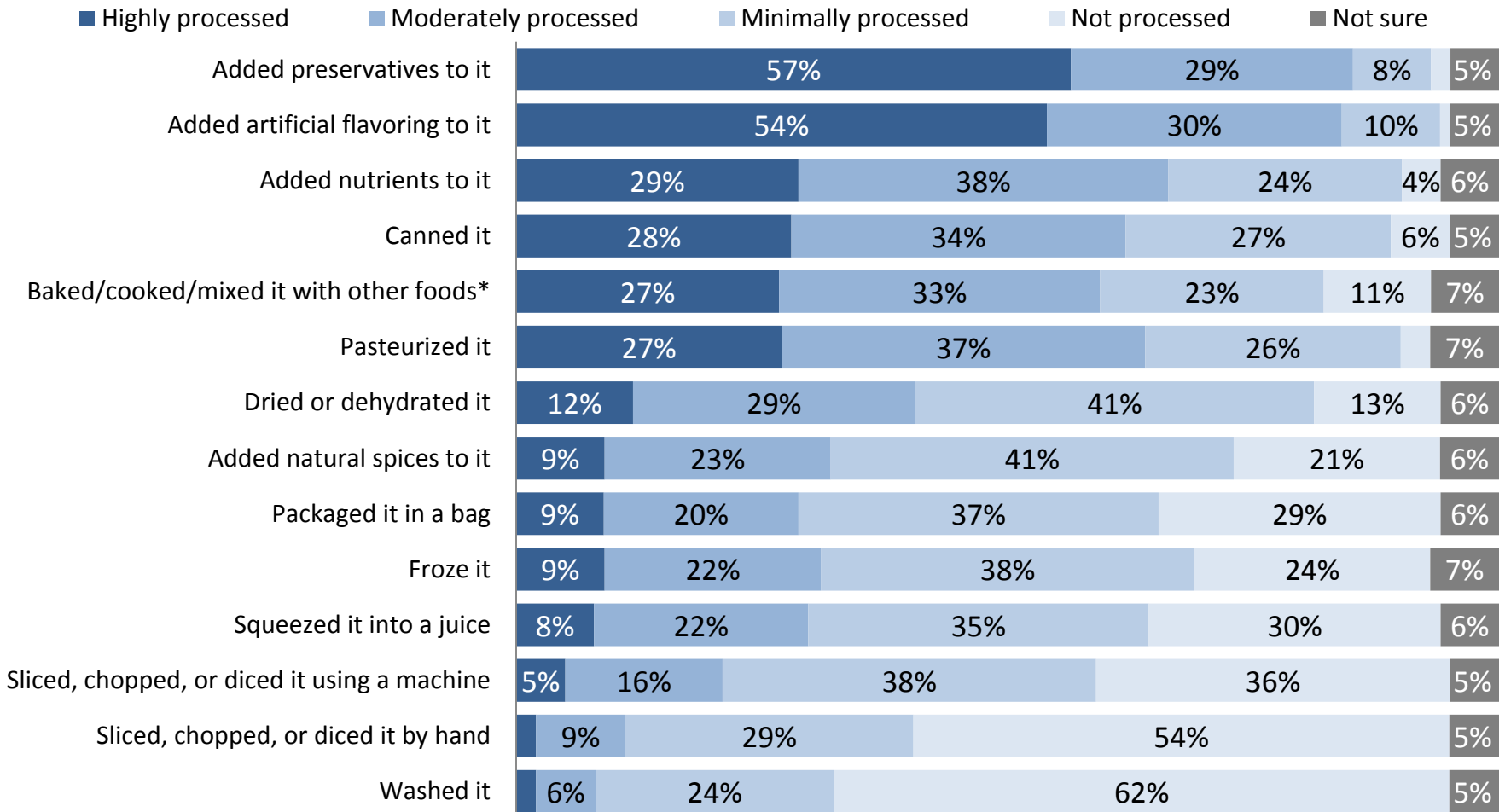
To what degree do you consider the following to be a “processed food”?  
(n=1,005)



# Adding preservatives or artificial flavoring are actions that consumers most link with highly processed foods. Adding nutrients is seen as a similar level of processing as canning, pasteurization, or mixing/cooking with other foods.

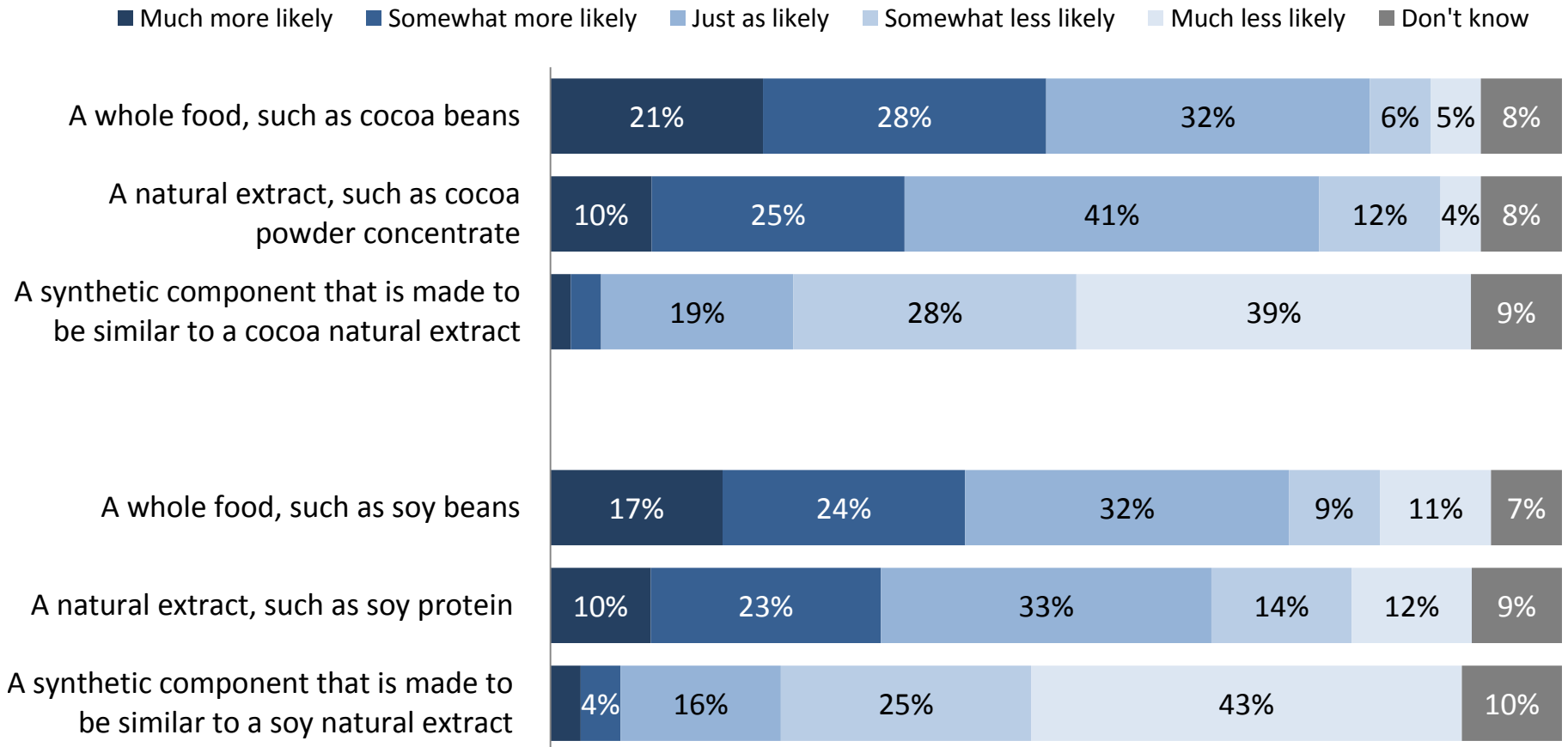
To what degree do you consider a food—such as a fruit, vegetable, or grain—to be a “processed food” if the following was done during production?

(n=1,005)



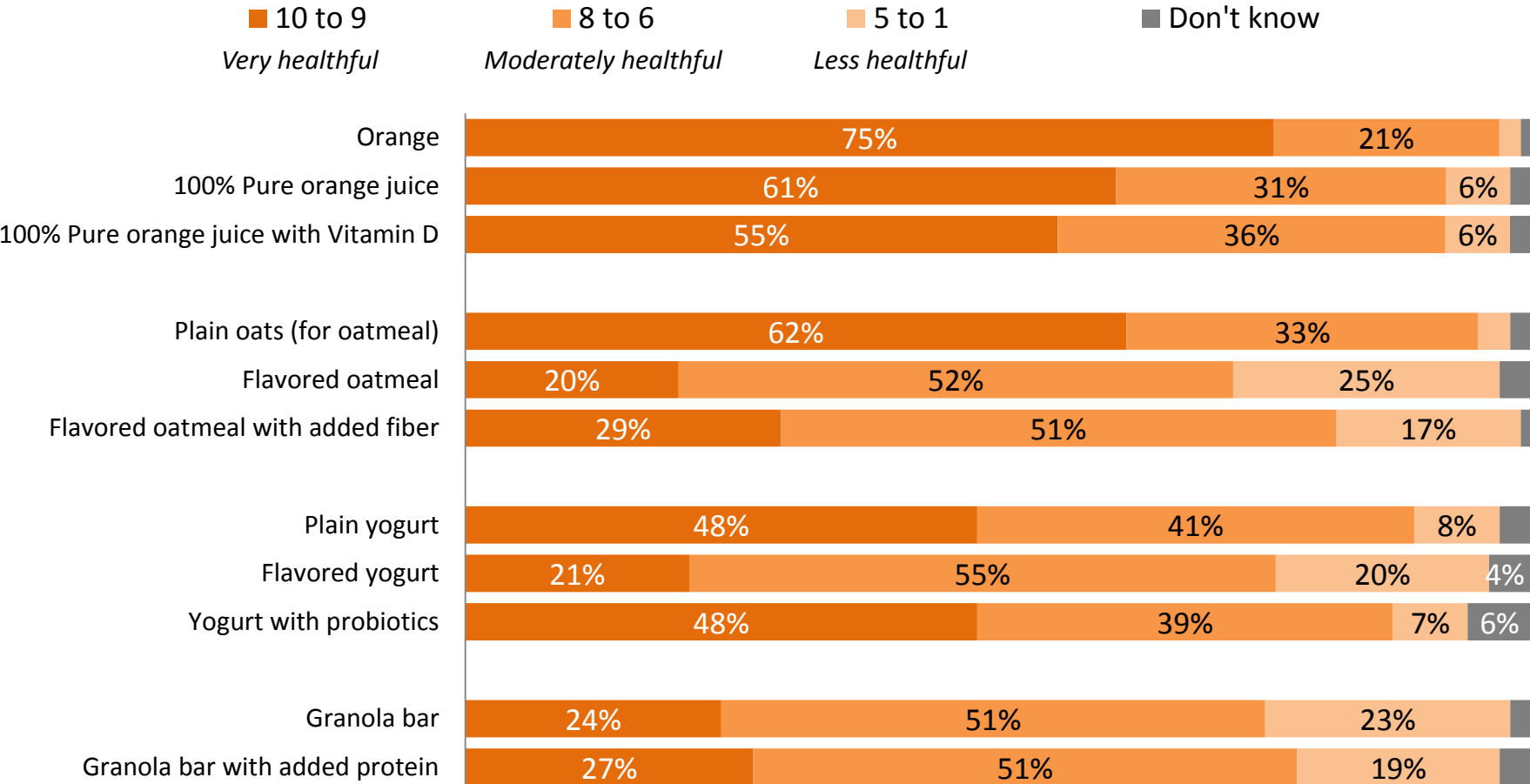
# Added nutrients from a whole food make 40%-50% of consumers more likely to buy a snack bar.

Let's say you were looking to buy a healthful snack bar at the grocery store.  
 Would you be more or less likely to buy the snack bar if it had added nutrients from...  
 (n=1,005)



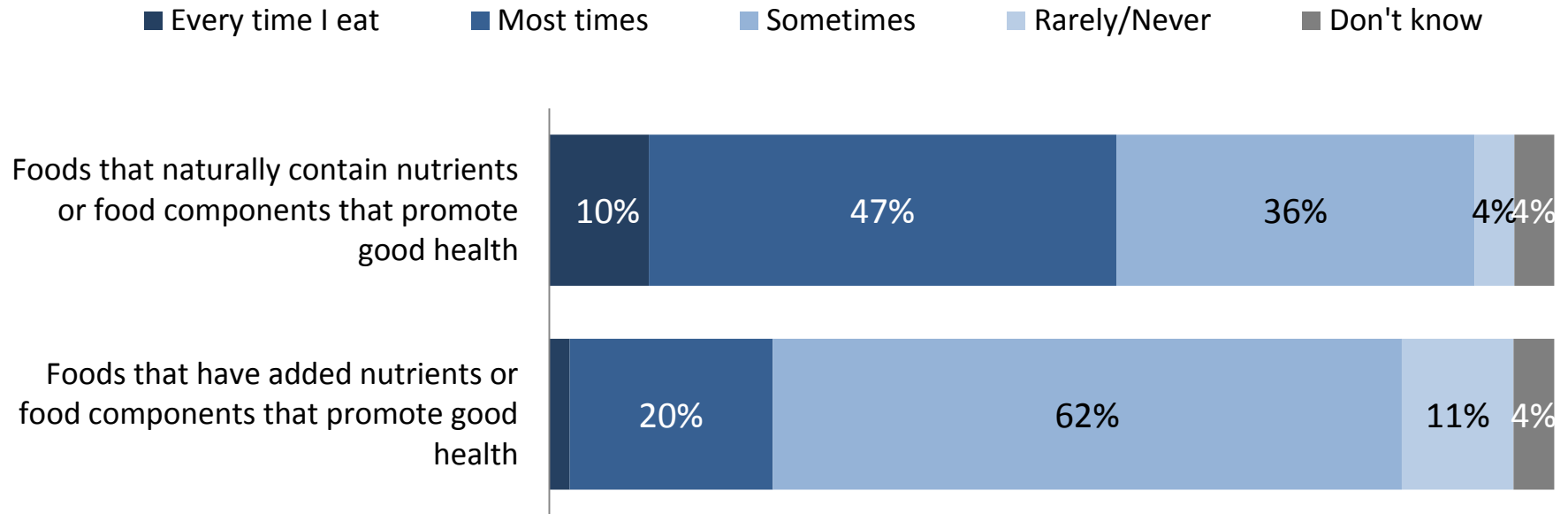
# Consumers' perceived healthfulness of certain foods may differ depending on the product and the fortificant.

To your knowledge, how healthful are the following foods to eat?  
 (1=Not at all healthful, 10=Extremely healthful)  
 (n=1,005)



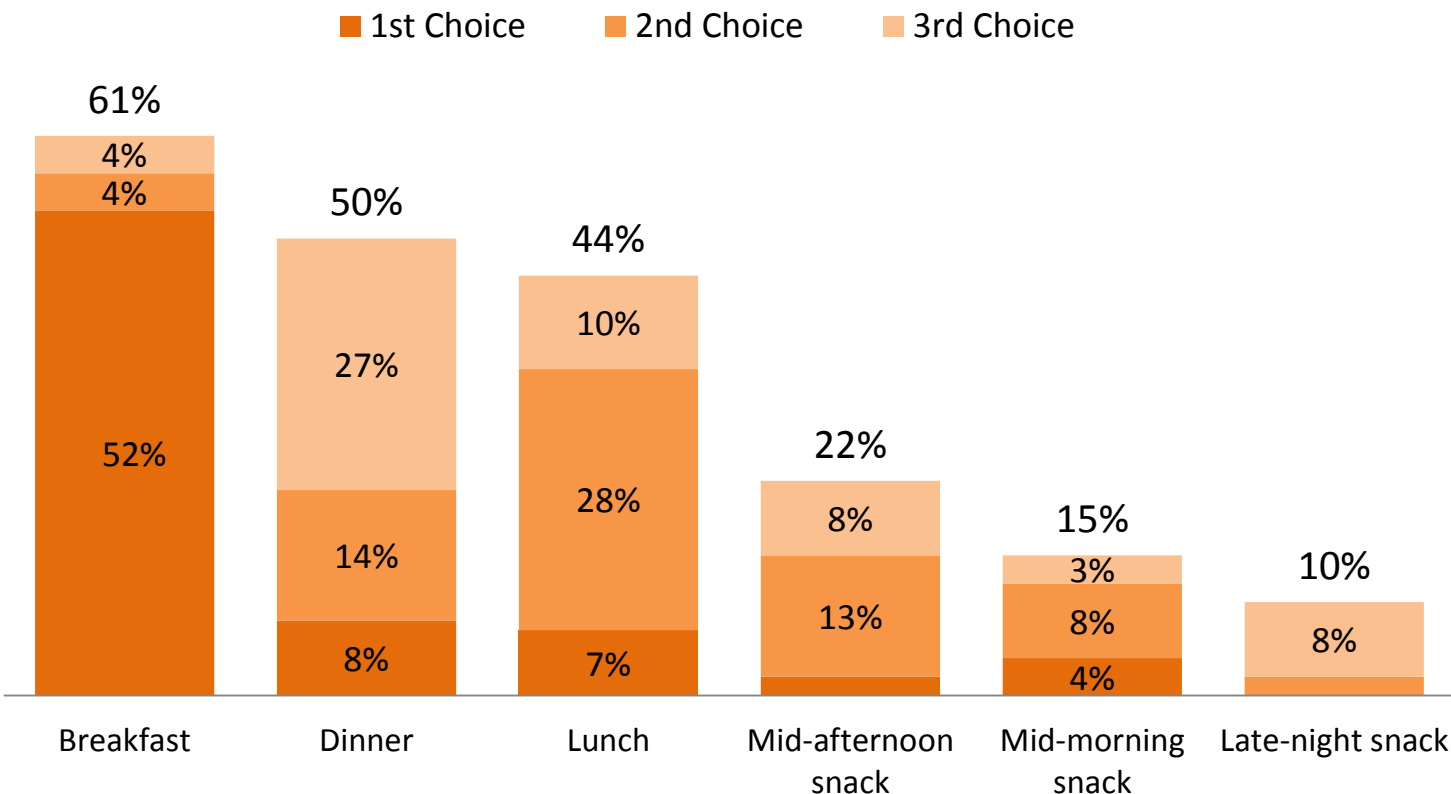
# Over half of consumers say they consume foods that naturally contain healthful nutrients/food components *most times* they eat. Only one in five eat foods with added nutrients or components that often.

How often, if at all, do you consume the following?  
(n=1,005)



# Breakfast is the overwhelming favorite meal or snack time when consumers want to include a functional food.

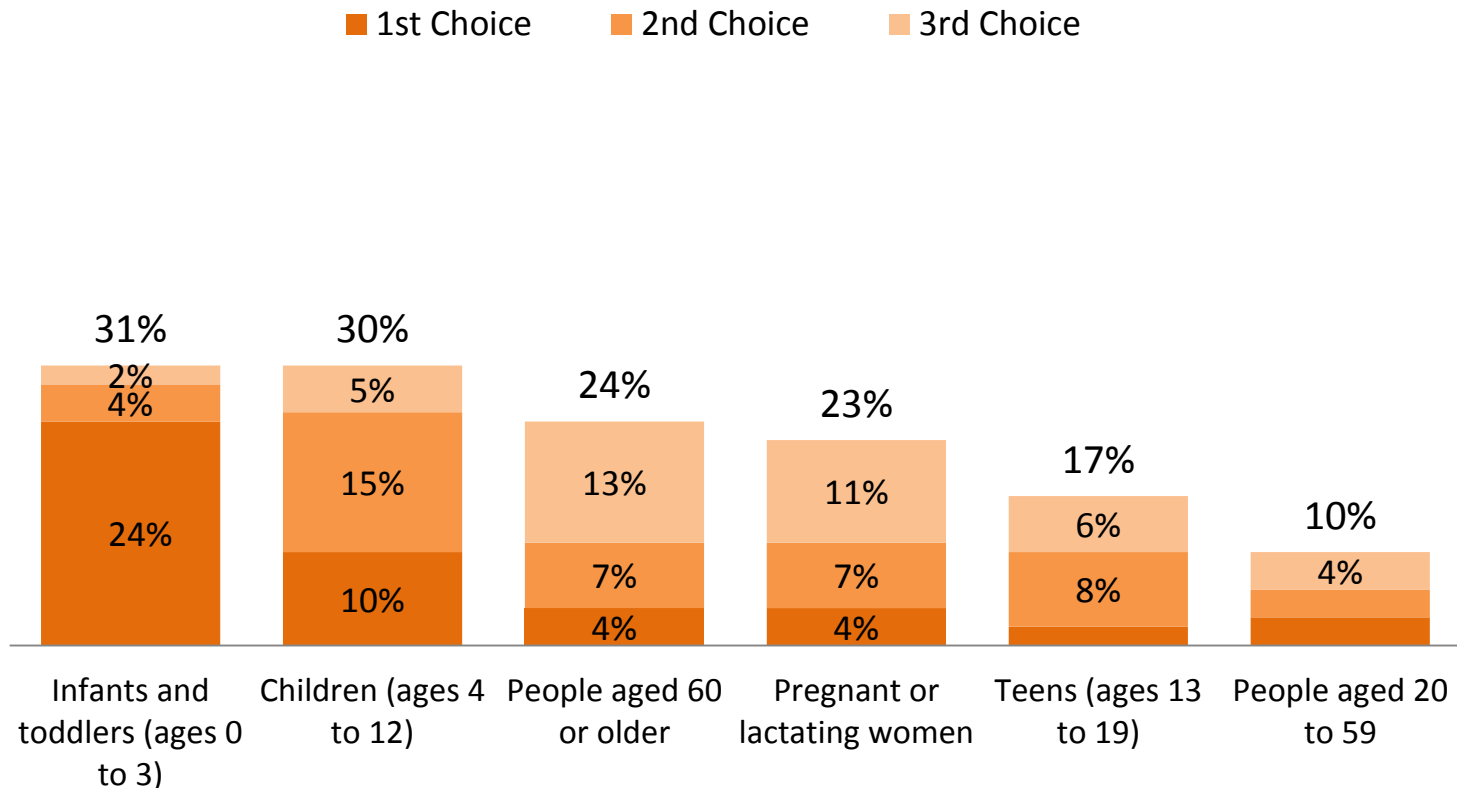
At what meals or snack times are you most likely to include foods that have nutrients or other food components that promote good health?  
(n=1,005)



# Consumers are most likely to think that infants and toddlers benefit more from functional foods than any other group of older children or adults.

For which of the following groups would you say that it is especially beneficial to eat foods that have nutrients or other food components that promote good health?

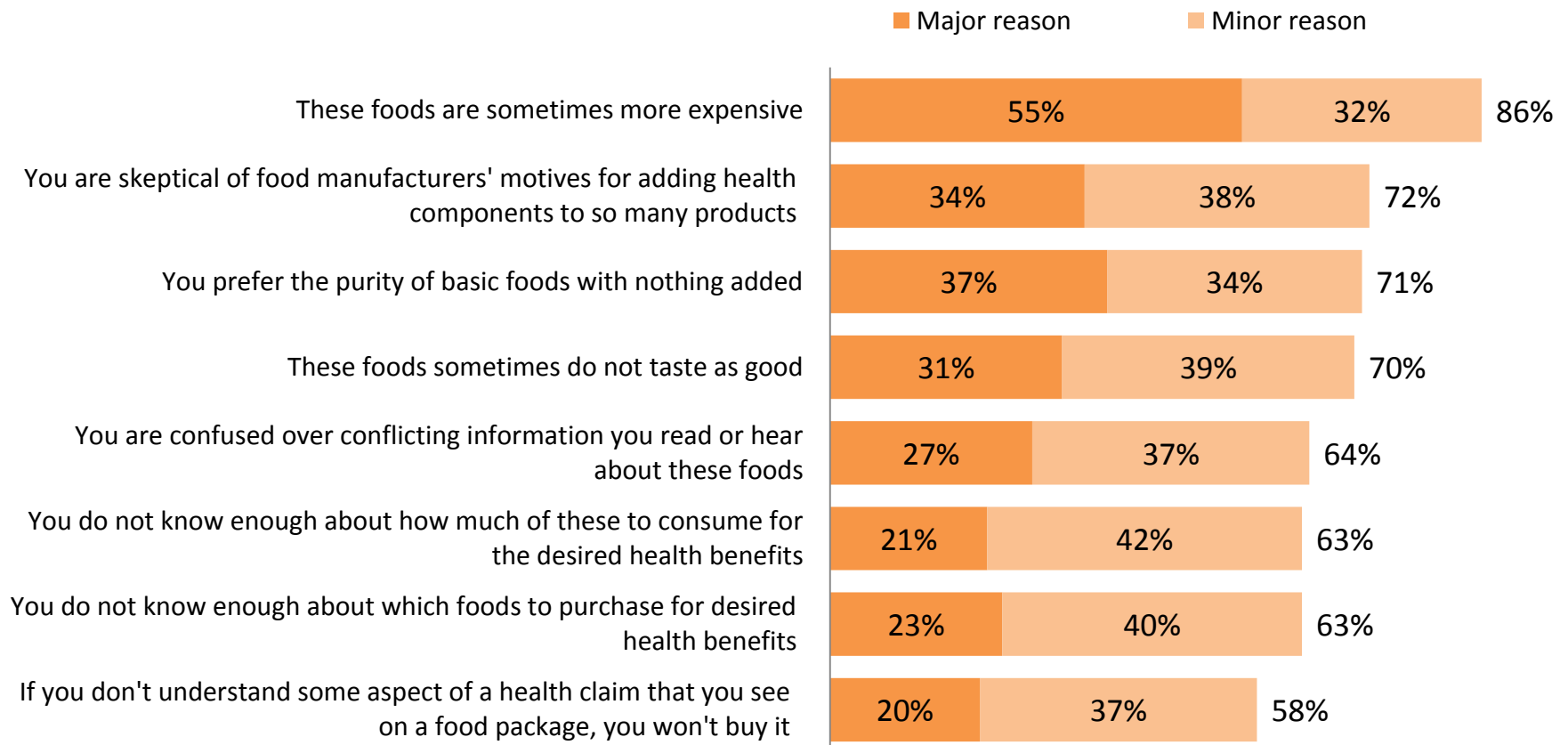
(n=1,005)



# 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)

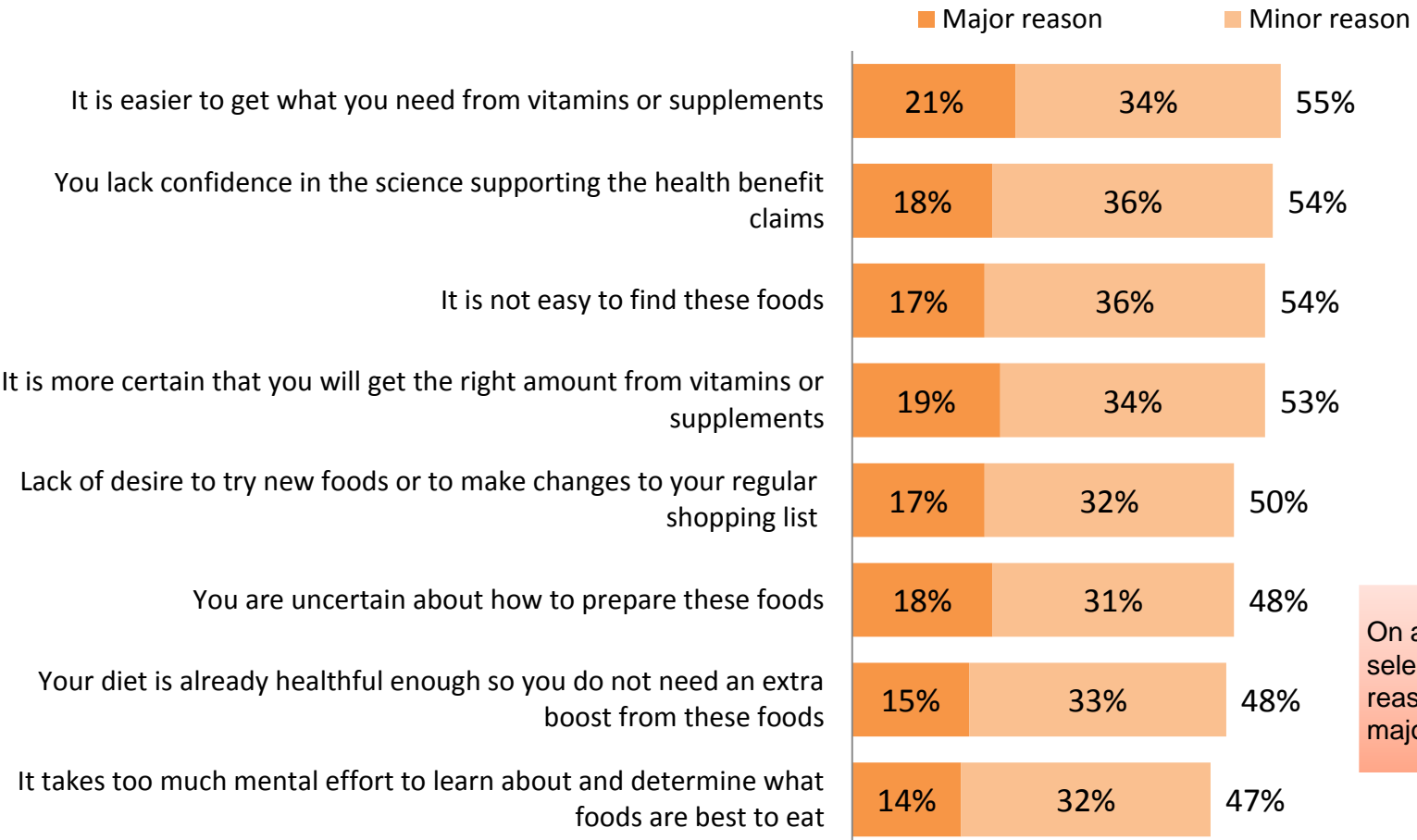




# Uncertainty about food preparation, getting enough already, and the mental effort required are among the least common barriers.

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)

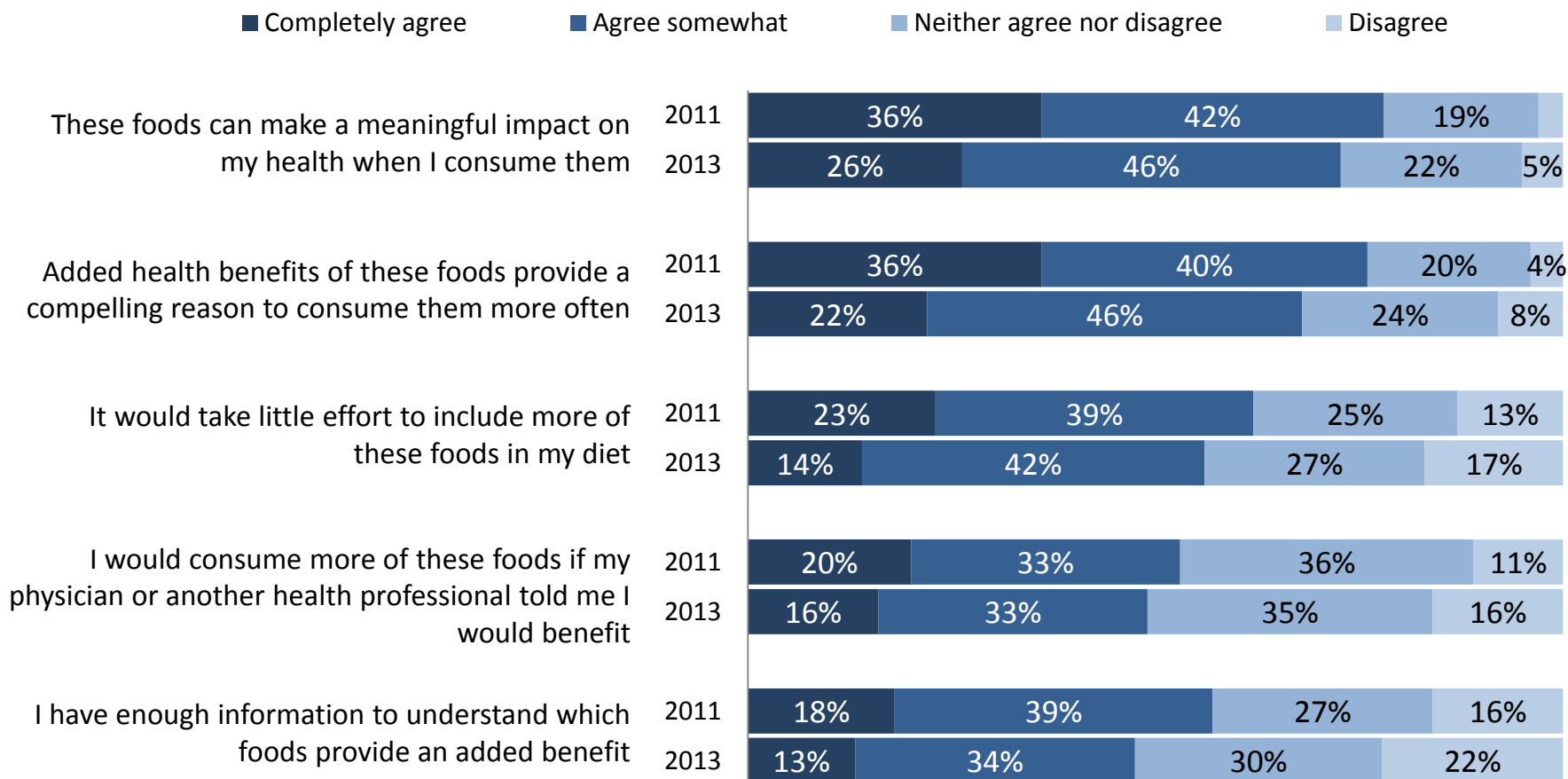


On average, consumers selected 10 of the 16 reasons (whether minor or major).

# Agreement to each of the statements regarding functional foods has declined since 2011.

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

(2011 n=1,000; 2013 n=1,005)

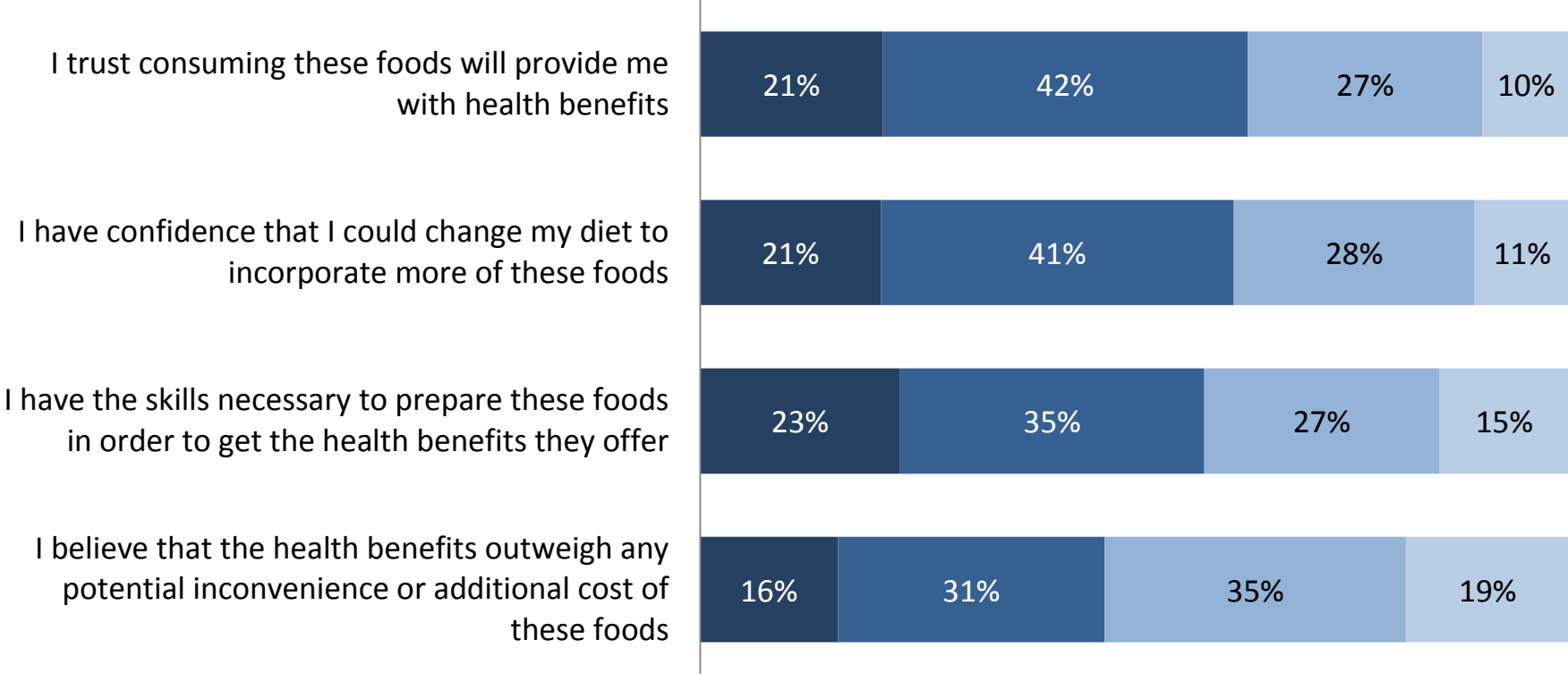


# Nearly two-thirds of consumers trust that functional foods will provide health benefits and have confidence that they could make the necessary changes to integrate these foods into their diet.

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

(n=1,005)

■ Completely agree   ■ Agree somewhat   ■ Neither agree nor disagree   ■ Disagree



# Demographic Profile - Trended

Age	2013 (n=1,005)	2011 (n=1,000)	2009 (n=1,005)	2007 (n=1,000)	2005 (n=1,012)	2002 (n=1,003)	2000 (n=1,000)	1998 (n=1,000)
18 to 24 years old	14%	12%	15%	13%	10%	15%	16%	11%
25 to 34 years old	17	18	16	19	19	16	16	20
35 to 44 years old	16	18	21	21	22	21	21	26
45 to 54 years old	20	22	21	20	20	19	18	19
55 to 64 years old	18	16	16	13	13	13	11	10
65 to 74 years old	13	8	8	12	14	9	11	9
75+ years old	2	5	4	2	2	6	7	4
Prefer not to answer	--	--	--	--	<.5	1	<.5	<.5

Education	2013	2011	2009	2007	2005	2002	2000	1998
Less than high school	3%	14%	12%	12%	3%	16%	21%	17%
Graduated from high school	40	31	35	35	40	33	33	33
Some college (no degree)	21							
Associate's, or technical/ vocational school	8	28	27	27	21	17	25	24
Bachelor's degree	19	18	17	17	25	24	14	17
Graduate/professional school	10	9	9	9	9	8	6	8
Prefer not to answer	--	--	--	--	1	1	1	1

# Demographic Profile - Trended

Hispanic/Latino/Spanish descent	2013 (n=1,005)	2011 (n=1,000)	2009 (n=1,005)	2007 (n=1,000)	2005 (n=1,012)	2002 (n=1,003)	2000 (n=1,000)	1998 (n=1,000)
Yes	15%	15%	12%	14%	8%	--	--	--
No	85	84	88	85	91	--	--	--
Prefer not to answer	--	<.5	1	1	1	--	--	--

Race/Ethnicity								
White	78%	76%	81%	77%	80%	73%	79%	80%
Black or African American	13	14	11	13	13	11	10	7
American Indian or Alaska Native	1	2	2	2	2	1	1	1
Asian	6	4	2	4	2	2	1	2
Native Hawaiian and other Pacific Islander	1	<.5	<.5	<.5	--	--	--	--
Other	3	4	6	4	4	10	7	6
Prefer not to answer	--	2	2	2	2	3	2	2

Gender								
Male	49%	48%	47%	46%	46%	49%	47%	51%
Female	51	52	53	54	54	51	53	49

# Demographic Profile - Trended

Overall health	2013 (n=1,005)	2011 (n=1,000)	2009 (n=1,005)	2007 (n=1,000)	2005 (n=1,012)	2002 (n=1,003)	2000 (n=1,000)	1998 (n=1,000)
Excellent	8%	9%	7%	9%	11%	13%	8%	13%
Very good	33	31	27	31	27	31	31	33
Good	40	37	38	37	38	35	37	35
Fair	17	19	21	18	19	16	20	15
Poor	3	4	6	5	4	4	3	4
Prefer not to answer	--	1	<.5	1	1	<.5	<.5	<.5

Income	2013	2011	2009	2007	2005	2002	2000	1998
Less than \$35K	34%	38%	44%	36%	31%	38%	49%	39%
\$35K to less than \$50K	19	19	16	21	22	15	13	24
\$50K to less than \$75K	18	19	16	18	21	15	15	15
\$75K to less than \$100K	11	11	8	9	10	12	7	7
\$100K to less than \$150K	8	5	5	7	6	5	4	5
\$150K and above	4	2	2	2	2	--	--	--
Don't know	1	<.5	2	1	1	--	--	--
Prefer not to answer	5	5	5	6	7	15	12	10

# Demographic Profile

Children under 18 in household	(n=1,005)
Yes	29%
No	71

Ages of children in household	(n=289)
Newborn to 2 years old	20%
3 to 6 years old	30
7 to 12 years old	47
13 to 17 years old	46

Marital status	(n=1,005)
Married	44%
Single, never married	32
Divorced or separated	12
Living with a partner	8
Widowed	3
Other	0

Proportion of grocery shopping done for household	(n=1,005)
All	54%
Most	26
Some	15
A little	4
None	1

Frequency of grocery shopping/meal prep for parents or senior-aged persons	(n=1,005)
Always	7%
Often	9
Sometimes	20
Rarely	19
Never	44

Proportion of meal preparation done for household	(n=1,005)
All	45%
Most	25
Some	16
A little	10
None	4
Not applicable—almost always eat out	<.5

# Demographic Profile

Weight	(n=1,003)
Less than 100 lbs.	1%
100 to 149 lbs.	27
150 to 199 lbs.	39
200 to 249 lbs.	19
250 to 299 lbs.	6
300 to 349 lbs.	2
350 to 399 lbs.	<.5
400 lbs. or more	<.5
Prefer not to answer	7

Height	(n=1,005)
Less than 5'0	2%
5'0 to 5'5	33
5'6 to 5'11	46
6'0 or taller	16
Prefer not to answer	4

BMI	(n=1,005)
Normal or Low (0 – 24.9)	39%
Overweight (25 – 29.9)	28
Obese (30+)	26
No answer	7

Frequency of physical activity	(n=1,005)
Less than an hour	10%
1 to 2 hours	13
3 to 4 hours	20
5 to 9 hours	23
10 to 19 hours	15
20 hours or more	14
Not sure	5

Knowledge of nutrition	(n=1,005)
Extremely knowledgeable	7%
Very knowledgeable	28
Somewhat knowledgeable	43
A little knowledgeable	17
Not at all knowledgeable	4