

1998/1999

*National
Report*



*Consumer
Attitudes
About
Nutrition*



This fifth annual nationwide survey examines consumer attitudes and perceptions on health and nutrition issues that may impact the food and healthcare industries. Conducted by the United Soybean Board (USB) to serve as an important resource for both markets, this report covers:

- Consumer nutrition attitudes and the effects on purchasing decisions
- Impact of nutrition attitudes on dining and grocery choices
- Impact of media coverage on nutrition attitudes
- Consumer perceptions of *trans* fatty acids and hydrogenation
- Consumer attitudes about biotechnology
- Consumer awareness and use of soy products

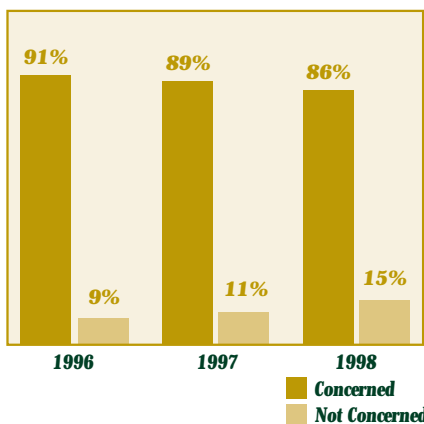
USB offers this survey, along with many other resources, to assist food and healthcare professionals in making sound business decisions related to the usage of soy. This study also provides useful information for customers and clients.

Conducted by an independent research firm, the study includes 1,028 random telephone surveys, providing a sample that is consistent with the total American population. The study's margin of error is +/- 3.2 percent and has a confidence level of 95 percent (95%).

Nutritional Concern and Habits

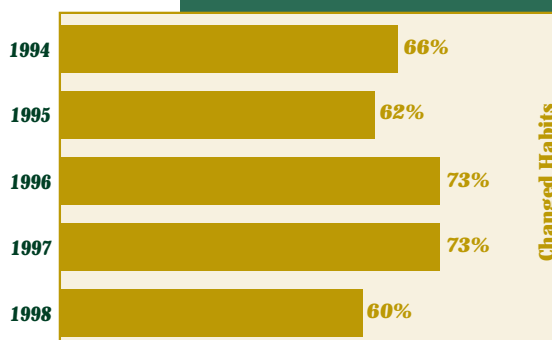
A majority of Americans (86%) remain concerned about the nutritional content of their food. With a five percent (5%) decline in nutrition concern since 1996, the trend indicates a small, but steady, decline.

Concern About the Nutritional Content of Food

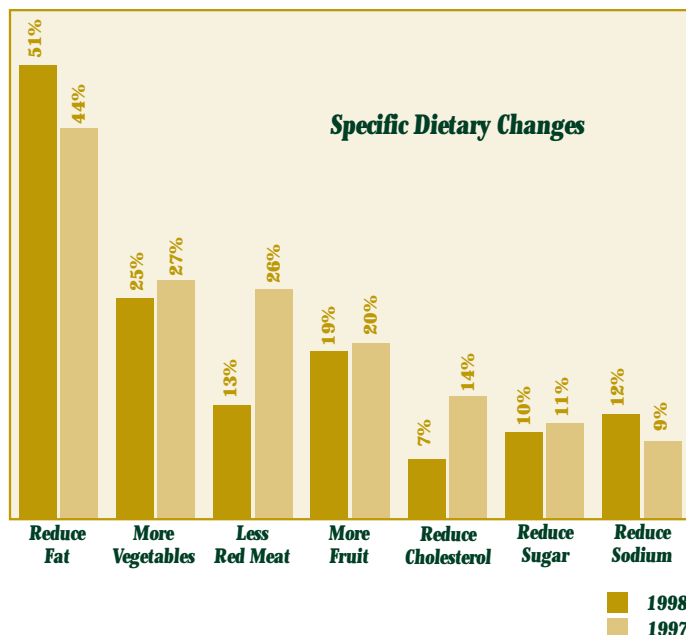


- Six in 10 Americans (60%) indicate that they have changed their eating habits in the past three to five years due to concern about nutrition, as opposed to seventy-three percent (73%) in 1997.

Percentage of Americans Changing Eating Habits Due to Nutrition is on the Decline



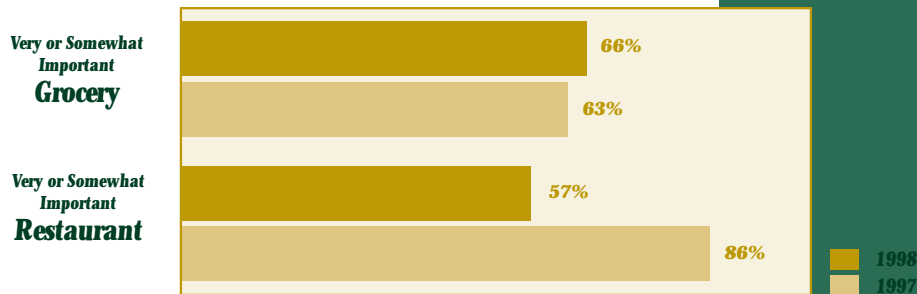
Dietary Changes in Eating Habits



- "Reduce fat" remains the top reason for changing eating habits, although the percentage of consumers stating this reason has fallen since 1997.
- Many consumers were not able to indicate a specific health concern that motivated their change in eating habits. Of those able to cite a specific reason, weight loss (21%) is the top motivating factor in changing eating habits.

Grocery and Dining Choices

Importance of Nutrition in Selecting Restaurants vs. Selecting Groceries



- The importance of nutrition in selecting groceries is higher than its importance when selecting a restaurant.
- While a majority of Americans found nutrition to be important when selecting a restaurant in 1998 (57%), this number declined significantly from 1997 (86%).
- Those who found nutrition to be important when selecting foods in the grocery store increased slightly (63% in 1997 vs. 66% in 1998).
- Fifty-eight percent (58%) of 55+ consider nutrition to be “very important” when buying groceries, while only 34% of 18 to 35 year olds consider nutrition to be “very important” when shopping.
- Females are significantly more likely than males to take nutrition into consideration when selecting a restaurant. Twenty seven percent (27%) of females consider nutrition to be “very important” in selecting a restaurant while only 16% of males consider nutrition to be “very important” in restaurant selection.

Media Sources and Nutritional Information

- The percentage of Americans recalling news stories on health and nutrition issues has risen considerably since 1995 (56% in 1995 vs. 68% in 1998).
- The number of people changing their eating habits because of news they've seen or heard has increased (42% in 1995 vs. 46% in 1998).
- In 1998, 63 percent (63%) of Americans either “strongly” or “somewhat” agreed that information about health is too confusing, as compared to 59 percent (59%) in 1997.
- Eighty-four percent (84%) either “somewhat” or “strongly” agree that the Nutrition Facts panel is important in deciding which food products to buy.
- The top source for information on nutrition and health issues continues to be magazines. Of those who are “very” or “somewhat” concerned, 90% seek health and nutrition information from magazines.
- Network TV news experienced the largest increase as an information source for news on health and nutrition, jumping from 19 percent (19%) in 1997 to 41 percent (41%) in 1998.
- Newspapers have decreased as a source for news on health and nutrition.

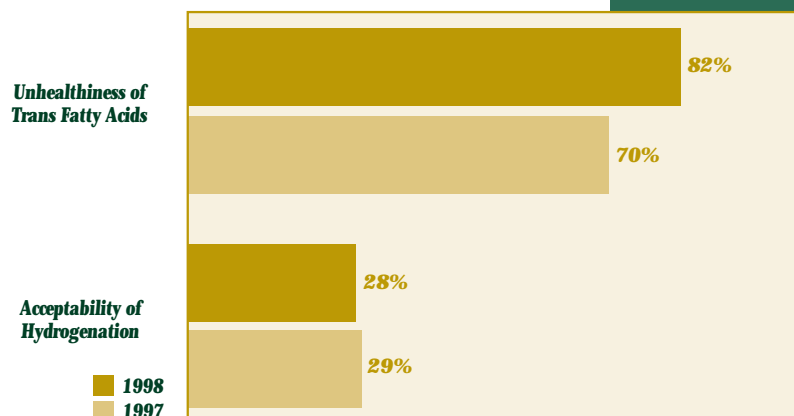
Nutrition Terms and Consumers' Level of Concern

- When asked about nutritional terms and their impact on overall health, the number one consumer nutrition concern continues to be fat overall at 73 percent (73%) and saturated fat, which also garnered the top answer at 73 percent (73%).
- Of those polled, 42 percent (42%) indicated they were concerned with *trans* fatty acids impacting their overall health.
- Sixty-eight percent (68%) indicated they were “very concerned” with their cholesterol level impacting their health.
- Generally, consumers that are concerned about health and nutrition issues are the most likely to understand specific nutritional terms.

Concern About Hydrogenation and Trans Fatty Acids

- Overall, more than eight out of 10 people (82%) consider *trans* fatty acids to be either somewhat or very unhealthy. Only 28 percent (28%) of those sampled consider hydrogenation to be acceptable.
- There is evidence that consumers connect the (un)healthiness of hydrogenation and the (un)healthiness of *trans* fatty acids. Among those who are “very concerned” with the level of *trans* fatty acids, over half (55%) consider hydrogenation to be “totally unacceptable,” which is significantly higher than those who find hydrogenation “somewhat unacceptable,” (27%). This indicates that as the understanding of hydrogenation increases, so does the level of concern with *trans* fatty acids.
- Those who are concerned with the level of *trans* fatty acids are also significantly more likely to spend more money for “healthy” versions of foods than those who are not concerned about *trans* fatty acids (58% vs. 22%).

Consumer Perceptions on the Trans Fat and Hydrogenation



Consumer Awareness and Perceptions of Soy Products

- Two-thirds of consumers (67%) believe soy products are healthy, up from 59 percent in 1997. Those with a college education are most likely to perceive soyfoods as healthy (75%).
- Sixty-seven percent (67%) of consumers have tried soy products.
- Fifteen percent (15%) of Americans eat soy products at least once a week. Although females are more health conscious than males, more males (19%) eat soy products once a week as compared to 13 percent (13%) of females.
- Among soy products, tofu and soy veggie burgers continue to receive the highest level of trial among consumers (38%). Sixty-seven percent (67%) of consumers have tried a soy product.
- Consumers most often include soy products in their diet because of word-of-mouth (38%) from friends, family, or other acquaintances. Magazine and newspaper articles (23%) are also influential factors in deciding to include soy products in the diet.
- The strongest factor driving trial of soy products is education level. Those with a college education are significantly more likely to have tried soy products than consumers with less than a college education.
- While an increased number of consumers perceive soy products as healthy, usage is not increasing at the same rate. This may be a function of several factors:
 1. Lack of understanding of different soy products available
 2. Lack of understanding of how one incorporates soy into cooking and the diet
 3. Lack of availability of soy products
 4. Negative attitudes and perceptions toward soy products due to factors such as taste and texture

Percentage of Americans Who Consider Soy Products to be Healthy



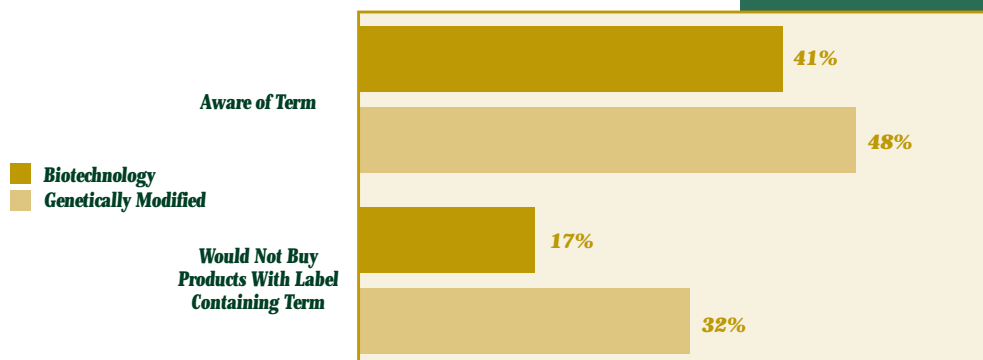
Consumers' Willingness to Pay More for "healthy" Foods

- Seven in ten (71%) Americans indicate that they would be willing to pay more for healthy foods.
- There is an inverse relationship between age and those who are willing to pay more for healthy food products. Among those ages 18-34, 40 percent (40%) are willing to spend an additional 76 cents or more on healthy food products. However, only 20 percent (20%) of those ages 55 and older are willing to pay at least 76 cents more for healthy food products.
- Although the 55+ age group makes up the largest percentage of people who are "very concerned" about nutrition, price may play a greater role in their purchase decisions than it does for younger age groups.
- Of those who have recently changed eating habits (60%), 81 percent (81%) are willing to pay more for healthy versions of foods.

Consumer Perceptions of Genetically Modified Food and Labeling

- Among consumers, the word “biotechnology” is more favorably received than the phrase “genetically modified.” Forty-one percent (41%) are familiar with the term “biotechnology,” while 48 percent (48%) are familiar with “genetically modified.” Awareness of both terms does not differ significantly across the different levels of overall concern for nutrition.
- Nearly one-third (32%) of Americans say that they would not purchase food items that included the word “genetically modified” on the label. Nineteen percent (19%) would purchase and 13 percent (13%) are undecided.
- Nearly half of those familiar with the term “biotechnology” are undecided about whether or not they would continue to purchase products labeled as such. This indicates that strong associations, neither positive nor negative, have not yet formed with the term.
- Eighty-four percent (84%) either “somewhat” or “strongly” agree that the Nutrition Facts panel is important in deciding which food products to buy.

Consumer Perceptions of Specific Terms



Consumer Perceptions of Cooking Oil

- Vegetable oil is used significantly more than any other type of cooking oil. Nearly one-third of consumers (32%) use vegetable oil most often, with canola coming in second at 21 percent (21%).
- Vegetable oil is used heavily by younger consumers. Forty-two percent (42%) of those between ages 18 and 34 use vegetable oil most often, while 28% of consumers over 35 use vegetable oil most often.
- Most Americans don't realize that “vegetable oil” is usually synonymous with soybean oil.
- The perceived healthiness of soybean oil is up significantly from 1997. For instance, in 1997 64% considered soybean oil to be either “somewhat healthy” or “very healthy,” while 82% currently consider soybean oil to be either “somewhat healthy” or “very healthy.”
- Consumers rank olive, soybean and canola oils to be the top three “healthy” cooking oils. Eighty-two percent (82%) of consumers perceive both soybean and canola oils to be either “very” or “somewhat” healthy. Olive oil was the top “healthy” choice at 85%.



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Questions? If you have questions about this study or would like to talk with a USB representative, call us at 1-800-TALK-SOY. Access a variety of soy related information at www.talksoy.com

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