

CONSUMER ATTITUDES ABOUT NUTRITION

Insights into Nutrition,
Health and Soyfoods



2005
12TH Annual
National Report





12th

twelfth annual survey

This 12th annual nationwide survey provides vital information on consumer attitudes and perceptions about health and nutrition issues. Sponsored by the United Soybean Board (USB), this report takes an in-depth look at:

- **Nutrition attitudes and their effect on purchasing decisions**
- **Consumer awareness of health benefits regarding soy products**
- **Attitudes about different types of fat**
- **Perceptions of biotechnology in food and agriculture**
- **Nutritional habits and obesity concerns**
- **Restaurant and home consumption of soy**

Conducted by an independent research firm, the study includes 1,000 random telephone interviews, providing a sample that is consistent with the total American population. The study's margin of error is +/- 1.9 to 3.1 percent and has a confidence interval of 95 percent.

USB serves as a resource for soybean-related educational materials. Healthcare and food professionals can utilize this study and other USB resources when making decisions on consumer nutrition. To view soy-specific materials, up-to-date health research, recipes and the *Soy Connection* newsletter, please visit USB's Web site at www.talksoy.com.



Nutritional Habits and Obesity Concerns

In 2005, consistent with the past seven years, nearly nine out of 10 consumers remain somewhat or very concerned about the nutritional content of food. This year, as in 2004, 74 percent of consumers claimed to have changed their eating habits due to health or nutrition concerns.

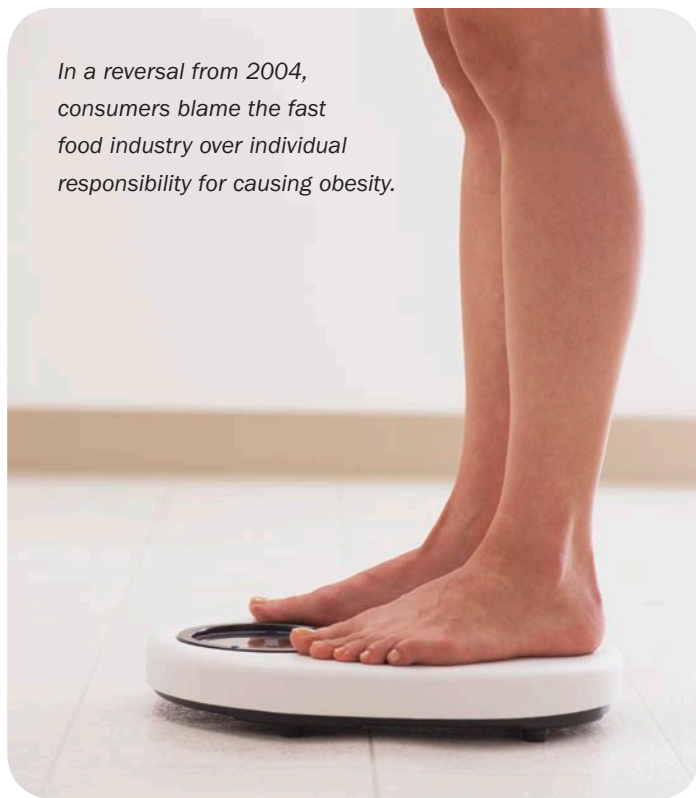
Despite consumer concerns, the Centers for Disease Control reports that thirty percent of U.S. adults (over 60 million people) are obese, and the percentage of obese youth has tripled since 1980. This year the tables turned again as more consumers (30 percent) considered the fast-food industry at fault for obesity while only 24 percent hold individuals responsible. Other perceived causes for obesity include not enough exercise (21 percent) and overeating (17 percent).

Sixty percent agree that consuming soy-based foods can play a role in reducing obesity while more than three-quarters of all surveyed agree soy products are healthy. An increased number of consumers (11 percent) are aware that soy is a good source of protein, up five points from last year.

CAUSES OF OBESITY IN AMERICA



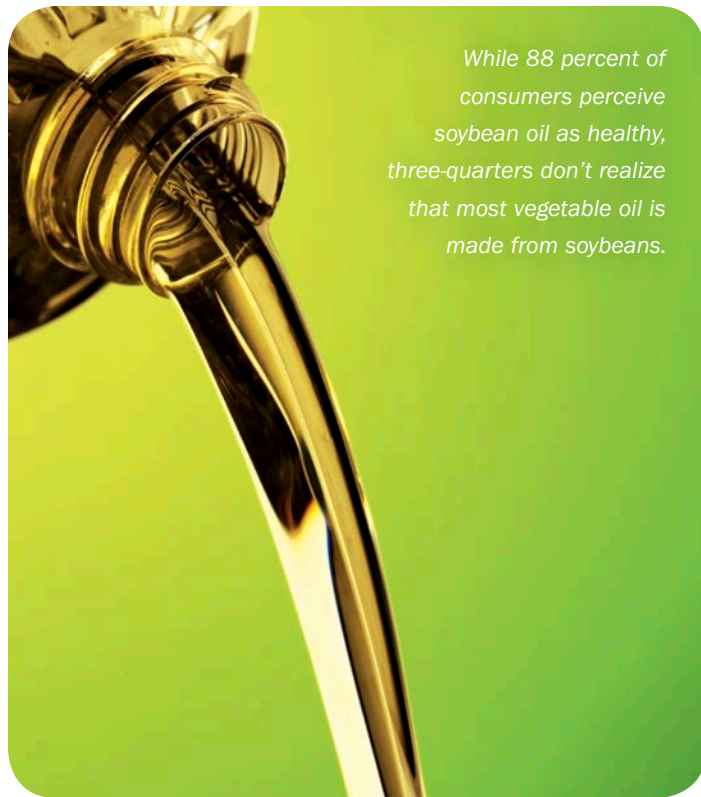
In a reversal from 2004, consumers blame the fast food industry over individual responsibility for causing obesity.



Healthy Food Decisions

Consistent with last year, eighty-seven percent of consumers consider the Nutrition Facts Label as important when deciding which foods to buy. Yet 52 percent of respondents say health and nutrition information is too confusing. This year, however, consumers reported less confusion with this figure dropping four points since 2004 from 56 to 52.

Continuing a three year trend, customer willingness to pay more for healthier versions of foods dropped from 68 to 64 percent. Fewer consumers (48 percent) reported looking for foods low in carbohydrate, down three points since last year.



While 88 percent of consumers perceive soybean oil as healthy, three-quarters don't realize that most vegetable oil is made from soybeans.

Consumer Attitudes About Fats

Consumers continue to be confused about the health profile of different fats. Half of the respondents still incorrectly deem polyunsaturated fats (50 percent) and monounsaturated fats (46 percent) unhealthy, not aware that these are important and necessary fats for the body. Both of these awareness figures dropped three points from last year. Eighty-eight percent, however, correctly report saturated fats as unhealthy. Sixty-six percent of consumers view *trans* fatty acids as unhealthy, consistent with last year. In regard to the perception of Omega-3 fatty acids, only half of U.S. consumers (52 percent) recognized Omega-3s as healthy, up four points from 2004.

Significantly more consumers than in 2004 recall recent media coverage of *trans* fatty acids. Awareness of coverage increased from 28 to 32 percent with 42 percent of this group unable to recall what the coverage was about, and 27 percent having a general recall about unhealthiness.

Eighty-one percent of consumers rate hydrogenated vegetable oils somewhat or very unhealthy, increasing a significant 14 points from 2004. Consistent with that trend, over sixty percent of consumers rate it somewhat or very unlikely that they would buy foods with hydrogenated vegetable oil in the ingredients list, increasing four points since last year. Fewer consumers say *trans* fatty acids are healthier than saturated fats, down from 40 to 33 percent. Those who say saturated fats are healthier (28 percent) decreased by four points this year.

Cooking Oil Impressions

Consumers continue to recognize olive oil (93 percent) and soybean oil (88 percent) as the two healthiest oils. When respondents were asked which nutritional benefits they associated with soybean oil, more could name less fat (up five points from two to seven percent) and more could name no cholesterol (up two points from 2004). Awareness of the benefits of polyunsaturated fat associated with soybean oil rose one point to four percent, yet awareness of the monounsaturated fat in soybean oil dropped one point to three percent. Eighty-eight percent of consumers perceive soybean oil as healthy, yet sixty-three percent are unable to name the specific benefits of soybean oil.

Sunflower and canola oil again tied for third healthiest oils at 84 percent followed by safflower (83 percent) and corn oil (63 percent).





Mac'n'Soy Cheese Casserole

Occasion Preferences for Consuming Soy

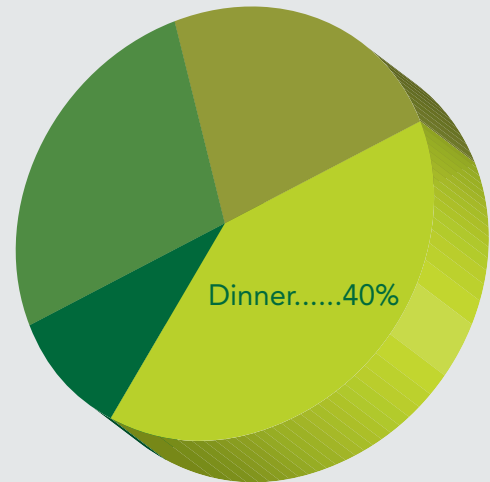
Consumers who use soy products at least once a month do so mainly at dinner (40 percent), followed by consumption at breakfast (27 percent) and lunch (23 percent). Breakfast consumption increased most from last year, up three points.

Awareness, Usage and Trial of Soy Products

Overall, consumer awareness of soy products increased this year. Soymilk's awareness rating remained at 90 percent while those who consume soymilk regularly increased three points from 16 to 19 percent. Compared to 2004, significantly more consumers (21 percent) are aware of edamame, up seven points, while awareness of dried/canned soybeans dropped 10 points from 46 to 36 percent. Regular consumption of soy veggie burgers increased to 11 percent, and significantly more consumers (39 percent) have tried plain white tofu than last year, up five points.

More than one-quarter of Americans (27 percent) consume soyfoods or soy beverages once a week or more. The percentage of respondents (35 percent) who never consume soy products dropped by three points this year. Among those who do not consume soy products, 49 percent report that they don't know why or nothing in particular prevents them from including soy in their diet. Twenty-five percent of this non-user group said taste prevents them from consuming soy.

CONSUMER PREFERENCES FOR CONSUMING SOY



Breakfast.....27%
Lunch23%
Other times 10%

Dinner remains the most popular mealtime for eating soy products.

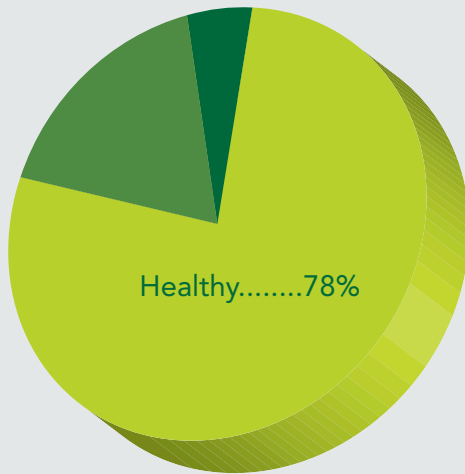
Soyfoods and Health

More U.S. consumers (78 percent) perceive soy products as healthy (up four points from last year). Significantly more (44 percent) report being aware of specific health benefits, up five points and reversing the decline seen in 2004. Of those who could name specific benefits unaided, 12 percent reported awareness that soy might relieve menopause symptoms and 14 percent said soy is beneficial for heart health. Yet when asked if they were specifically aware of the soy heart health claim, (consuming 25 grams of soy protein per day reduces the risk of coronary heart disease), 33 percent of consumers responded affirmatively. This is a four point increase in awareness compared to last year.

UNAIDED AWARENESS OF HEALTH BENEFITS OF SOY



PERCEIVED HEALTHINESS OF SOY PRODUCTS



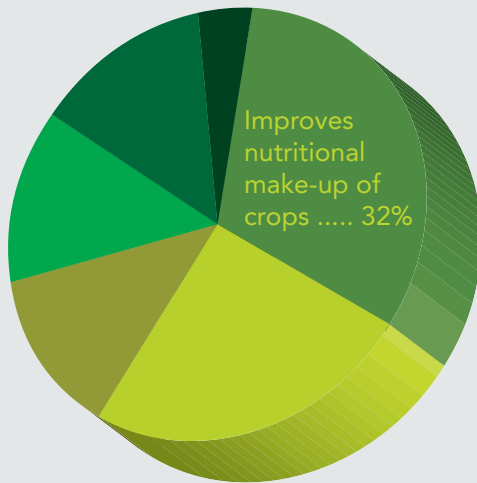
Neutral 17%
Unhealthy 5%

Of those who perceive soy as healthy, 26 percent seek out products that specifically contain soy. Most consumers read about soy health news through magazines and newspapers (55 percent), 10 percent received information from friends and family and 22 percent from TV news.

**Over two-fifths
of consumers are aware of
specific health benefits of
including soy in their diet.**

Biotechnology in Food and Agriculture

PERCEPTIONS OF BIOTECH IN AGRICULTURE



Don't Know	25%
Allows farmers to use fewer pesticides, herbicides and toxins	13%
Positive Perception	13%
Negative Perception	13%
Other	4%

Consistent with last year, one-third of consumers somewhat familiar with the term biotechnology feel that its role within agriculture is to improve the nutritional make-up of crops, while one-quarter report they don't know enough about biotechnology to say what role it plays. Thirteen percent think that biotechnology allows farmers to use fewer pesticides, herbicides and toxins.

PERCEPTIONS OF BIOTECH IN FOOD

Significantly more consumers (46 percent) consider themselves at least somewhat familiar with biotechnology, up seven points from last year. Of this group, 62 percent report a positive perception of its role in food production.

Restaurants and Soy Products

A new question added to the survey this year reveals that one in five consumers *would* order soy products in restaurants *if* they were available, with veggie burgers the most popular item (33 percent), followed by tofu (26 percent), soymilk (22 percent) and edamame (six percent). Many who consume soy at home don't order soy in restaurants. This generally occurs because soy products are not available (20 percent), soy is not specified on the menu (17 percent) or soy products they like are not offered (11 percent). Others report that they like to indulge when they dine out, eating things not consumed at home (11 percent).

TYPES OF SOY ACTUALLY ORDERED IN RESTAURANTS

Plain White Tofu	37%
Veggie Burger	28%
Soymilk	11%
Miso	11%
Edamame	10%
Other Products	19%

Plain white tofu and veggie burgers are the most popular soy items ordered in restaurants.



A farmer-led organization comprised of 64 farmer-directors, the United Soybean Board oversees the investments of the soybean checkoff on behalf of all U.S. soybean farmers. For more information, please visit: www.talksoy.com

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