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The Functional Food Trend: What's Next and What Americans Think About Eggs
By: Linda Gilbert
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INTRODUCTION

The HealthFocus Survey is a national survey of U.S. shoppers. It has been conducted bi-annually since 1990. The study has four primary objectives:

1. To identify current issues in consumer health and nutrition behavior and attitudes.
2. To assess the trends in consumer priorities regarding nutrition issues, such as fat, calories, vitamins, etc.
3. To develop understandings of where consumers are headed in the behavior towards their health and diet.
4. To determine what nutritional issues will be important for marketers and product developers to target over the near horizon.

METHODS

The HealthFocus Survey is conducted in two stages; first, respondents are recruited by telephone and qualified as

Primary Grocery Shoppers (PGS). PGS make most or equally share the food buying decisions for their household. Then a questionnaire including more than 300 questions is sent by mail for completion by each PGS.

The HealthFocus Survey has yielded results from more than 2000 PGS in 1998, 1996, and 1994, and 1000 PGS in 1992 and 1990. About 80% of the respondents are women.

RESULTS

Making The Health Connection

Most shoppers see a connection between nutrition and their health. They believe foods can offer benefits that reach beyond basic nutrition to functional nutrition for disease prevention and health enhancement.

Although diet is very important to about two-thirds of shoppers, this attitude does not always translate into careful eating. Only 10% of shoppers always choose foods for health reasons. Another 60% usually do so, 24% sometimes do so, and 6% rarely or never choose foods for health reasons.

The numbers show a continuing shift from always or usually to sometimes. The change comes from the moderately committed: the percentage of shoppers who usually eat healthy foods has dropped eleven points since 1990, with a corresponding increase in the number of shoppers who sometimes do so.

At the same time, there has been no change in shoppers' desire to improve their diets. Most shoppers see room for improvement and continue to aspire to eat healthy more often. Seventy-nine percent of shoppers consider their diet to be healthy but only 17% are very satisfied with their eating habits.

Consumer Priorities For Functional Foods

HealthFocus has identified four consumer priorities, for choosing healthy foods that will fuel success for functional foods.

1. Taste, Taste and More Taste. The primary obstacle to making healthy choices is taste. Today's shoppers are

less willing than ever to compromise taste for health benefits. At the same time, perceptions of the taste and enjoyment of healthy foods have declined. Only 27% of shoppers think healthy foods taste better, down from 35% in 1990. Women are significantly more likely to like the taste of healthy foods: 29% of women agree or strongly agree healthy foods taste better, compared to 19% of men.

Almost one in two shoppers (46%) won't give up good taste for health benefits, up from one in three shoppers (33%) in 1990. Fewer shoppers are avoiding some favorite foods in order to eat healthier today as well. Men are less likely to give up favorite foods: 21% of men rarely or never avoid favorite foods for health reasons, compared to 15% of women.

2. Self-Medication, Self-Education. Consumers remain confident in their ability to manage their own health. They are willing to try alternative health care practices and are experimenting with new products offering herbal and nutritional ingredients for health care. Nutritional and herbal solutions are believable to many consumers as a way to manage health with less dependence on medicines. As a result, nutraceuticals and functional foods are making their way to the marketplace. Shoppers have a growing sense of a need to be self-reliant in these matters, fueling trends in self-education. Marketers need to enable shoppers to be self-reliant about their health care by providing shoppers with smarter products, simpler information and do-it-yourself know-how.
3. Nutritional Individualization. Almost three out of four (72%) shoppers agrees that everyone has different nutritional needs from everyone else; one in five (19%) shoppers strongly agree. Not only do shoppers believe individuals differ from one another, they believe that their own needs change based on their levels of activity. More than half (58%) at least sometimes modify their own diets with this in mind. Marketers need to deliver health and nutrition products that are nutritionally customized, whether personally customized ("right for me"), situationally customized ("what I need now"), or otherwise customized. Differing life stages and health conditions require customization and personalization to deliver "what is best for me". For example, brands that are clearly identified with women, children, or shoppers

of certain ages have significant opportunities to nutritionally customize their products in logical ways for shoppers. Products that are strongly occasion-oriented can use that occasion to help consumers place the health and nutrition value of the product.

4. Filling the Gaps. Looking for solutions to fill in the nutritional gaps left by hurried eating habits; attitudes about the importance of supplements and nutritionally fortified foods and beverages are changing significantly. Almost two-thirds (62%) of shoppers agree daily supplements are important, up from 49% in 1994. More than half (56%) feel the same about foods and beverages fortified with added vitamins and minerals, up from 54% two years ago. In turn, more shoppers are using supplements, from multi-vitamins to specialty formulas to nutritional beverages and bars. By helping consumers see where they have nutritional gaps to be filled, and delivering products and communications that address that gap, marketers can influence interest and behavior.

Beyond Basic Nutrition -- Functional Nutrition

Consumers recognize a variety of benefits, from making healthy choices, that reach beyond basic nutrition. Eating healthy foods has emotional (self-esteem), physical (feel good) and cosmetic (look good) benefits for shoppers today. Seventy-eight percent of shoppers agree that "eating healthy makes me feel good about myself", and 70% agree they feel better physically when they eat healthy foods. Almost two-thirds (64%) agree "healthy eating improves my physical appearance", and 60% say their physical appearance is more attractive through general health and nutrition habits.

Consumers also recognize medical benefits from eating healthy foods. Fifty-four percent agree, and 11% strongly agree that foods can be used to reduce their use of some drugs and other medical therapy. This is up from 52% in 1996 and 41% in 1994. When asked their primary reason for choosing healthy foods, 13% of consumers choose "to control or treat an existing problem. One in three shoppers (33%) always or usually choose foods for specific medical purposes, such as chicken soup for a cold, or cranberry juice for urinary infections.

Despite this interest in benefits that reach beyond basic nutrition, only 24% of shoppers have heard a lot or some about functional foods, up from 22% in 1996. About half (53%) have not heard of functional foods.

Even fewer (10%) shoppers have heard a lot or some about nutraceuticals, up from 7% in 1996. Three out of four (75%) have not heard of nutraceuticals.

Consumers Want To Know More

Shoppers are looking for a variety of health benefits form the foods and beverages they buy and use. Foods that boost the immune system, reduce disease risk, and enhance health have appeal to more than 3 out of 4 Americans.

More than half of shoppers are interested in learning more about the functional components of foods, from the cancer preventing chemicals in grains and produce, to herbs to active cultures in yogurt.

What Americans Think About Eggs

Although many shoppers started cutting back on egg consumption in the 1980’s due to cholesterol concerns, eggs are considered a healthy food by most consumers as long as they are eaten in moderation. Consumers like the protein and positive nutrition of eggs, the convenience and energy of eggs, and the wholesomeness of eggs. They don’t like the fat and cholesterol associated with eggs.

As Americans continue to look for ways to improve their eating habits, eggs are being eaten more often. The increase in egg consumption is being driven by consumer interest in health benefits that reach beyond dietary avoidance strategies to positive nutrition strategies. While most consumers in the past ten or fifteen years have based their health choices on prevention benefits, with a focus on avoiding fat, cholesterol, calories and other nutritional undesirables, consumers today are shifting their focus to trying to eat more nutritionally desirable foods.

Eggs play an important role in healthy eating habits. About one in three shoppers today eats eggs weekly (62%), up from 59% in 1992 and 1994. Thirty percent of shoppers eat eggs at least twice a week, and 32% eat eggs weekly. Only 5% don’t use eggs at all.

Shoppers ages 30 to 39 years are the most likely to eat eggs weekly (65%); younger shoppers ages 18 to 29 years are the least likely (57%). Men and women enjoy eggs equally often. Those living in households with children are especially likely to eat eggs weekly (64%, vs. 61% of HH with no children).

Primary Health Benefit Platforms

HealthFocus has identified five primary benefit platforms for functional and nutritional products: Prevention, Performance, Wellness, Nurturing, and Cosmetics. There is a fit for eggs in consumers' minds, across all five benefit platforms.

Prevention. (29% are frequent egg users) Prevention benefits are about health management and reduction of risk or impact of a health problem. The lutein and zeaxanthin content of eggs can play an important role in prevention of AMD, the leading cause of age-related blindness. Only 60% of today's consumers who are strongly oriented to Prevention benefits eat eggs weekly, although that is expected to increase as awareness of the relationship between AMD and lutein and zeaxanthin increases.

Performance. (31% are frequent egg users) Performance benefits are about health enhancement. Consumers talk about accomplishment, excelling, and peak abilities when they talk about Performance benefits. They see a strong fit for eggs as a high protein, high quality energy food. Watch for Choline to reach consumers radar screens – for improved mental performance.

Wellness. (33% are frequent egg users) Wellness benefits are about balance, moderation and feeling good. Wellness is typically the most holistic of the five benefits, and is about nourishing the body, mind and spirit. Eggs have a long Wellness tradition and association for consumers -- offering simplicity, wholesomeness, purity and balance.

Nurturing. (38% are frequent egg users) Nurturing benefits are about growth and development, and quality of life. Nurturers are caretakers, usually of children. Eggs fit especially well into healthy eating habits for Nurturers, as they are not often fat or cholesterol concerned. Their focus is on wholesome nutrition -- to lay a strong foundation of health for their children. Shoppers who are most strongly oriented to Nurturing benefits are the most likely to be frequent egg users.

Cosmetic. Cosmetic benefits are about looking good and the sense of self esteem associated with looking good. Cosmetic benefits include weight management, and healthy skin, hair and nails. Shoppers who are strongly oriented to Cosmetic benefits tend to be only moderate egg users.

Sources of Information

Shoppers today rely on a combination of sources for health and nutrition information. No single information source is definitive for today’s information oriented shoppers. Food labels and doctors are widely used information sources, but when all media sources are netted together, the media is the most powerful information source. Whether watching TV, listening to the radio, reading magazines or newspapers, or shopping advertisements, the media is highly influential in building consumer awareness and know-how.

Frequent egg users are more likely than non-users to turn to television, radio, women’s magazines, newspapers, and dietitians for useful health and nutrition information. Non-users of eggs put more emphasis on labels and health magazines compared to frequent egg users.

Communications That Work

The information shoppers acquire, shapes and directs their future health and nutrition choices. When marketing health benefits to shoppers today, marketers need to reach beyond advertising and public relations strategies to knowledge-based marketing strategies.

Knowledge-based marketing strategies will be key to success in the new millennium — especially for brands that lead their categories. Surround your customer with information from a variety of sources including point of purchase, news, popular media, health media, advertising, health experts, and more.

When considering health and nutrition information, consumers look for confirmation and affirmation for what they already know. They are more likely to be receptive and to understand new information when it is presented in a framework of known information. Consumer friendly messages build from the familiar knowledge to the unfamiliar. They want to know: "How much do I need?" (for the desired functional benefit); "How much is in it?" (in this product), and "How much is too much?"

Today's self-reliant approach to health creates significant opportunities for health and nutrition marketers to use knowledge-based marketing programs to shape present and future health decisions and product choices among shoppers.

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Vegetarian and Vegetarian-Aware Eating Trends
By: Linda Gilbert
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SUMMARY

For the sake of health benefits, more Americans are willing to make meatless choices, at least occasionally, than were willing to do so in the past. Vegetarian menus are not only more acceptable among shoppers today, they are seen as a healthful and smart way of eating. Americans are not giving up meat altogether, but they are no longer as loyal to meat on the menu. They are seeking solutions for preventing disease and maintaining daily good health through vegetarian food choices.

Two percent of shoppers say they always maintain a vegetarian diet and another 26% say they usually (7%) or sometimes (19%) do so. This 28% of shoppers are driving demand for vegetarian products on grocery shelves, in restaurants, and at school cafeterias.

Growth in the market for vegetarian products in recent years has been largely fueled by Vegetarian Aware Shoppers, while the number of true Vegetarian Shoppers has remained relatively stable.Not interested in avoiding meat altogether, Vegetarian Aware Shoppers are eating meatless meals more often for health reasons; seeking out fruits, vegetables and whole grains; and adopting meatless burgers, soy hot dogs, and other vegetarian choices.

WHAT VEGETARIAN MEANS

As a dietary habit or lifestyle, vegetarianism includes a spectrum of dietary choices, ranging from vegan, ovo-vegetarian, lacto-ovo-vegetarian, pesco-vegetarian, to semi-vegetarian or Vegetarian Aware.

- Vegans avoid all animal-derived products.
- Ovo-Vegetarians do not eat meats or dairy products, but include eggs in their diet.
- Lacto-Ovo-Vegetarians do not eat meats, but include eggs and dairy products in their diet.
- Pesco-Vegetarians do not eat meats, but include eggs, dairy products and fish in their diet
- Semi-Vegetarians do not eat red meats but include eggs, dairy products, fish and poultry in their diet.
- Vegetarian Aware Shoppers do not avoid meats, dairy products, or eggs altogether, but are trying to eat meatless meals more often.

A BRIEF HISTORY

Vegetarianism has been around for centuries, often as a tenant of eastern religions and philosophies. In the United States, vegetarianism has Christian roots. Reverend William Metcalfe introduced vegetarianism to the United States in 1817. In 1863, the Seventh-Day Adventist church was founded and members adopted eating guidelines prohibiting meat, tobacco, alcohol, tea, and coffee consumption. Around the turn of the century, Dr John Harvey Kellogg, of cereal fame, founded a sanitarium in Battle Creek, Michigan that advocated vegetarianism and healthy living. During the 1960's, vegetarianism became tied to the "counter-culture" as environmental issues fueled new interest in vegetarian eating habits. In 1971, Frances Moore Lappe harshly examined the meat industry, and the resources necessary to support it, in her book, *Diet for a Small Planet*. An immensely popular book, *Diet for a Small Planet* increased awareness of the environmental reasons for becoming a vegetarian among the American public.

NUTRITIONALLY MISUNDERSTOOD

Until recently, the health benefits of vegetarian diets have been largely misunderstood. Just twenty-five years ago, vegetarian diets were predicted to give rise to osteoporosis, anemia, and protein-deficiencies.

Vegetarian eating habits are now nutritionally acceptable and generally recognized as healthy. While vegetarian once meant “counter-culture”, vegetarian today is viewed as a smart way to eat healthfully among mainstream consumers. Both male and female vegetarians are known to suffer significantly less from cancer, heart disease and obesity.

Once the domain of health food or other specialty brands, major brands such as Green Giant and Stouffer’s now offer vegetarian frozen burgers and dinners respectively. Two icons of American culture, Walt Disney World and Denny’s, also offer vegetarian menu options in their restaurants.

VEGETARIAN-AWARE SHOPPERS

In 1994, the Wall Street Journal reported that HealthFocus coined a term for the growing consumer group interested in vegetarian eating habits but not interested in giving up meat altogether: “Vegetarian Aware Shoppers.” Vegetarian Aware Shoppers are interested in eating less meat, primarily due to their interest in eating less fat and eating more vegetables, fruits, whole grains and beans.

HealthFocus tracks trends in vegetarian eating habits in their National Study of Public Attitudes and Actions Toward Shopping and Eating. A market research and consulting firm based in Des Moines, Iowa, HealthFocus has conducted the study every two years since 1990. The national survey is conducted in two stages: telephone recruitment and a mailed survey. The telephone recruitment qualifies respondents Primary Grocery Shoppers (make all or equally share the food buying decisions for their household). The survey asks more than 300 questions and was completed by more than 2,000 people in 1996 and 1994, and more than 1,000 people in 1992 and 1990.

The survey objectives are to:

- Identify current issues in consumer health and nutrition attitudes and actions, such as avoiding red meats and eating more vegetables.
- Assess trends in consumer priorities regarding eating habits and nutrition issues, from price and convenience to better nutrition.

- Examine where consumers are headed in their behavior towards health and diet.
- Determine what nutritional issues will be most important to shoppers in the near future.

MEAT ON THE MENU

It's important to recognize that Vegetarian and Vegetarian Aware Shoppers are not giving up meat altogether, rather they are viewing meat as a less prominent aspect of their meals. Shoppers say, "I'm a Vegetarian; I only eat chicken and never beef or pork". This is not really being a true vegetarian.

According to the 1996 HealthFocus Study, both Vegetarian Shoppers and Vegetarian Aware Shoppers still eat meat on occasion, although Vegetarian Shoppers are far less likely to put meat on their plate. Fish and seafood are the most widely used meats among Vegetarian and Vegetarian Aware Shoppers, followed by poultry.

Almost one-third (thirty-one percent) of Vegetarian Shoppers always or usually avoid dairy products and ingredients; seventy-nine percent always or usually avoid foods with red meat. Still, only seventy-eight percent of shoppers who say they always maintain a vegetarian diet eat meatless meals twice a week or more often.

MARKET SIZE

According to the HealthFocus Survey, almost thirty percent of American shoppers, shopping for 25.7 million households, are choosing vegetarian or meatless meals. Since 1990, the number of Vegetarian Shoppers has remained relatively stable, with about two percent of all shoppers always maintaining a Vegetarian diet.

The number of shoppers making Vegetarian Aware choices is increasing. In 1996, twenty-six percent of shoppers maintain a vegetarian diet 'usually' (seven percent) or 'sometimes' (19 percent) up from twenty-four percent of shoppers in 1994. The number of shoppers maintaining a vegetarian diet 'at least on occasion' increased by six percentage points, from forty-eight percent in 1994 to fifty-four percent in 1996.

DEMOGRAPHICS OF VEGETARIAN AND

VEGETARIAN AWARE SHOPPERS

Men are somewhat more likely to be Vegetarian Shoppers, and women are more likely to be Vegetarian Aware Shoppers: three percent of men always maintain a Vegetarian diet, compared to just two percent of women. On the other hand, twenty-six percent of women usually or sometimes maintain a Vegetarian diet, compared to just twenty one percent of men.

Vegetarian Shoppers tend to be younger: twenty-one percent are aged 18-29 years, compared to just twelve percent of shoppers overall. They are also more likely to have young children at home: 42% have children under two years of age and 42% have children aged 3 to 6 years.

In contrast, Vegetarian Aware Shoppers are older: 25% are aged 50-64 years, compared to just 23% of all shoppers; 22% are over age 65, compared to 17% of shoppers overall. Vegetarian Aware Shoppers have older children at home: 47% have teenagers, compared to just 44% of all shoppers and 42% of Vegetarian Shoppers.

Shoppers making Vegetarian and Vegetarian Aware choices are somewhat better educated than other shoppers. Forty percent of Vegetarian Shoppers and thirty-six percent of Vegetarian Aware Shoppers have at least a college degree, compared to thirty-two percent of all shoppers.

Vegetarian Aware Shoppers live in higher income households than Vegetarian Shoppers, likely due to their age and experience in the workplace. Vegetarian Shoppers have a median household income of $29,000, while Vegetarian Aware Shoppers have a median household income of $37,800.

Geographically, Vegetarian and Vegetarian Aware Shoppers live in highest concentrations in the North Central region of the United States. Vegetarian Shoppers are most likely to live in the North Central (33%), Pacific (21%), Mid-Atlantic (14%) and New England (12%) regions. Vegetarian Aware Shoppers are most likely to live in the North Central region (29%).

Compared to the general population, Vegetarian Shoppers are found in higher concentrations in the South Central (9%) and

Mountain (2%) regions. Vegetarian Aware shoppers are found in higher concentrations in the South Atlantic (18%) and South Central (19%) regions.

DIETARY PRIORITIES

The most significant aspect of the Vegetarian and Vegetarian Aware consumer market is their strong commitment to healthy eating habits. Healthy eating is more important and more top-of-mind for Vegetarian and Vegetarian Aware Shoppers, compared to shoppers overall. Their attitudes are extreme and their behavior is more consistent, compared to other shoppers.

Fifty percent of Vegetarian Shoppers and twenty-four percent of Vegetarian Aware Shoppers strongly agree that their diet is very important to them, compared to fifteen percent of all shoppers. Fifty-eight percent of Vegetarian Shoppers and thirty-two percent of Vegetarian Aware Shoppers strongly agree that they think about the healthfulness or nutritional value of what they eat, compared to just twenty-four percent of all shoppers.

This attention to what they eat translates to action: thirty-six percent of Vegetarian Shoppers and seventeen percent of Vegetarian Aware Shoppers always select foods for healthy reasons. Forty-eight percent of Vegetarian and thirty-six percent of Vegetarian Aware Shoppers always read labels on food packages, compared to twenty-seven percent of all shoppers.

HEART-HEALTHY, LOW FAT AND LOW CALORIE DIETS

Eighty percent of Vegetarian Shoppers and sixty-seven percent of Vegetarian Aware Shoppers always or usually maintain a “heart-healthy” diet, compared to only half of all shoppers who place similar importance on heart-healthy eating habits. Seventy-four percent of Vegetarian Shoppers and sixty-five percent of Vegetarian Aware Shoppers always or usually maintain a low fat diet.

Vegetarian and Vegetarian Aware Shoppers also put a higher priority on maintaining a low calorie diet. Sixty percent of Vegetarians and 43% of Vegetarian Aware Shoppers always maintain a low calorie diet, compared to just 26% of shoppers overall.

This emphasis on health, rather than religious or environmental issues, has meant that many longstanding vegetarian brands and products have had to reformulate and reposition themselves to address their targets concerns about maintaining heart-healthy, low fat, low calorie diets. For many consumers, the simplest way to cut back on fat is to cut back on meats. These choices are preventive measures that motivated by interest in better future health.

HEALTH ISSUES

Ensuring future good health and managing weight are the primary reasons Vegetarian and Vegetarian Aware Shoppers make healthy choices. Ensuring future good health is the primary reason for choosing healthy foods for sixty-seven percent of Vegetarian Aware Shoppers, sixty-five percent of all shoppers, and fifty-six percent of Vegetarian Shoppers.

While philosophical or spiritual reasons are strong motivators for those strictly Vegetarian (eighteen percent), the secondary reason Vegetarian Shoppers (twenty-four percent) choose healthy foods is to lose weight. Only ten percent of Vegetarian Aware Shoppers and thirteen percent of all shoppers select healthy foods to lose weight.

The secondary reason Vegetarian Aware Shoppers (sixteen percent) choose healthy foods is to control existing health problems.

HEALTH CONCERNS

Vegetarian and Vegetarian Aware Shoppers have more extreme concerns about future health problems, compared to shoppers overall. Cancer tops the list of health concerns, followed by heart disease, osteoporosis, being overweight, and having high cholesterol.

Vegetarians have the highest cancer concerns. Sixty-six percent of Vegetarians are extremely or very concerned about cancer, compared to 62% of Vegetarian Aware Shoppers and 57% of shoppers overall. They also express high concerns about osteoporosis and their weight.

Vegetarian Aware Shoppers are especially concerned about heart disease and high cholesterol, more so than Vegetarians are. Sixty-four percent of Vegetarian Aware Shoppers are extremely or very concerned about heart disease, compared to 58% of Vegetarians and 59% of shoppers overall. Similarly, 49% of Vegetarian Aware Shoppers are extremely or very concerned about high cholesterol, compared to 45% of Vegetarians and 44% of shoppers overall.

HEALTH PROBLEMS

The comparatively low levels of concern about heart disease and high cholesterol among Vegetarian Shoppers is probably in part a reflection of their better health status. Sixty-five percent of Vegetarian Shoppers describe their health as excellent or very good, compared to 53% of Vegetarian Aware Shoppers and 53% of shoppers overall.

Vegetarian Shoppers are significantly less likely to be personally affected by health problems than are other shoppers. Three exceptions are lactose intolerance, diabetes and arthritis, where vegetarian choices may be helping to manage the health problem once it occurs or is diagnosed. Younger and more attentive to heart-healthy eating habits, Vegetarian Shoppers are relatively unlikely to report being overweight, having high cholesterol levels or high blood pressure, or suffering from allergies or stress, compared to Vegetarian Aware Shoppers and shoppers overall.

Vegetarian Aware Shoppers are somewhat more likely than all shoppers to report hypertension or high cholesterol levels, stress, diabetes, arthritis and osteoporosis, but they are less likely than all shoppers to report being overweight. They are equally likely to report allergies.

Stress, arthritis and allergies are the most common health problems reported by Vegetarian Shoppers. Thirty-six percent of Vegetarian Shoppers are affected by stress, thirty-three report suffering from arthritis, and thirty-one percent report allergies. Osteoporosis, frequent colds and flues, and high cholesterol levels are the least widespread.

The most common health problems among Vegetarian Aware Shoppers are stress, allergies and being overweight. Fifty-one percent of Vegetarian Aware Shoppers suffer from stress, 42% report allergies, and 31% are overweight. Frequent colds and flues, diabetes and osteoporosis are their least common health problems

SHOPPING HABITS

Just as Vegetarian and Vegetarian Aware Shoppers differ in their nutrition attitudes and health priorities, they have different shopping habits. Both shop at natural foods and health food stores more often than shoppers overall, but Vegetarian Shoppers are much more likely than Vegetarian Aware Shoppers to go often, and also to go to nutrition centers. Vegetarian Shoppers go to the supermarket less often: seventy-two percent visit their supermarket weekly, compared to 83% of Vegetarian Aware Shoppers and 82% of shoppers overall.

Twenty-three percent of Vegetarian Shoppers go to a supermarket-type natural foods store weekly, and 21% go to a small health or natural foods store as often. Fifteen percent of Vegetarian Aware Shoppers go to a supermarket-type natural foods store weekly, and eight percent go to a small health or natural foods store. This compares to ten percent of all shoppers who go to a supermarket-type natural foods store weekly, and four percent who go to a small health or natural foods store.

Vegetarian Shoppers are ten times more likely to go to nutrition centers, such as a GNC, weekly, compared to Vegetarian Aware Shoppers or to shoppers overall. Ten percent of Vegetarian Shoppers frequent nutrition centers weekly; one percent of Vegetarian Aware Shoppers and 1% of shoppers overall shop at nutrition centers at least once a week.

Surprisingly, Vegetarian Shoppers are about as likely as shoppers are overall to shop at a convenience store at least once a week. Fifteen percent of Vegetarian Shoppers, fourteen percent of Vegetarian Aware Shoppers, and seventeen percent of all shoppers make the convenience store stop weekly.

PACKAGE INFORMATION

When shopping, Vegetarian Shoppers are label readers: forty-eight percent always or usually read labels on packages. Only thirty-six percent of Vegetarian Aware Shoppers and

27% of all shoppers do the same.

The freshness date is the most important part of the package labeling, followed by the nutrition fact box and ingredient statement. Vegetarian Shoppers give extreme importance to this label information. Seventy percent consider freshness dating extremely important, sixty percent consider the nutrition fact box extremely important, and the same number say the ingredient statement is extremely important.

Freshness dating is extremely important to 60% of Vegetarian Aware Shoppers and to 58% of shoppers overall. Forty-six percent of Vegetarian Aware Shoppers and 36% of shoppers overall consider the nutrition fact box extremely important. Forty-three percent of Vegetarian Aware Shoppers and 33% of shoppers overall consider the ingredient statement extremely important.

Other important label information includes content claims and health claims, a customer service or 800- number, and recipes. Thirty-four percent of Vegetarian Shoppers consider a customer service number on the label extremely important, compared to twenty-two percent of Vegetarian Aware Shoppers and 17% of all shoppers. Twenty-six percent of Vegetarian Shoppers like recipes on the package and consider them extremely important. Half as many Vegetarian Aware Shoppers give recipes this level of importance, and only eleven percent of shoppers overall do so

LABEL CLAIMS

Vegetarian Shoppers are significantly more interested in and influenced by health claims and content claims, than are Vegetarian Aware Shoppers or shoppers overall. Content claims on labels are extremely important to forty-three percent of Vegetarian Shoppers and thirty-one percent of Vegetarian Aware Shoppers, compared to only twenty-five percent of shoppers overall. Health claims get almost as much importance: thirty-seven percent of Vegetarian Shoppers and twenty-four percent of Vegetarian Aware Shoppers, compared to only nineteen percent of shoppers overall.

The differing health priorities among Vegetarian and Vegetarian Aware Shoppers are apparent in their label interests. Vegetarian Shoppers give the most importance to labels reading “grown without pesticides”, “fresh”, “good source of antioxidants”, and “certified organic”. Vegetarian Aware Shoppers have more mainstream interests, giving the most importance to labels reading “fresh”, “grown without pesticides”, “fat free”, and “low fat”.

NATURAL AND ORGANIC

Just as Vegetarian and Vegetarian Aware Shoppers are more likely to shop at health and natural foods stores, they are more likely to look for brands and to support companies that share their social, environmental and other values. Seventy-nine percent of Vegetarian Shoppers strongly agree or agree that environmental issues have impacted their purchases, compared to sixty-four percent of Vegetarian Aware Shoppers and fifty-one percent of shoppers overall. Vegetarian (seventy-three percent) and Vegetarian Aware Shoppers (sixty-one percent) prefer to buy products from companies that support their social, community or environmental interests.

This social and environmental sense of responsibility is reflected at the checkout counter in organic foods purchases. Thirty-one percent of Vegetarian Shoppers use organic produce twice a week or more, compared to only eleven percent of Vegetarian Aware Shoppers and eight percent of all shoppers. Twenty-eight percent of Vegetarian Shoppers use organic grains twice a week or more, compared to twelve percent of Vegetarian Aware Shoppers and ten percent of all shoppers. Finally, organic processed foods are used twice a week or more by thirteen percent of Vegetarian Shoppers, and five percent of Vegetarian Aware Shoppers and four percent of all shoppers.

A GROWING MARKET

Use of vegetarian products and meatless meal options is growing and is expected to continue to grow, driven by consumer interest in healthier eating and scientific evidence supporting the importance of more produce and grains in the diet and less meat. Fifty-four percent of all shoppers in 1996 report they eat a vegetarian diet at least on occasion, up from 48% just two years ago. Nine percent of shoppers lay claim to the moniker “Vegetarian”, although fewer than 2% practice classical vegetarian eating habits including no meat, no eggs and no dairy products.

In 1996, forty percent of all shoppers are eating meatless meals such as pastas or salads weekly; up from thirteen percent in 1990.

Meat substitutes or analogs such as Harvest Burgers and Grillers are also becoming more popular with American shoppers. Fifteen percent of all shoppers use these products weekly, up from nine percent in 1994 and seven percent in 1992.

The weekly use of soyfoods such as tempeh or tofu has also increased -- from three percent of shoppers in 1992 and four percent in 1994 to five percent in 1996.Clearly, use of vegetarian products and meatless meal options is growing and will continue to grow. Market growth will be driven by consumer interest in healthier eating, and fueled by scientific evidence supporting the importance of more produce and grains in the diet and less meat.

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Marketing Functional Foods: How To Reach Your Target Audience

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Neutraceuticals, functional foods, enhanced products – whatever you want to call them, foods enriched with vitamins, minerals or herbal supplements are a growing trend. For food manufacturers, however, getting functional foods to market, and getting them accepted by the shopping public, may be as challenging as the product formulations themselves.

The key to success in marketing functional foods is to understand the different generational and lifestyle segments that make up the American scene today. An aging Baby Boomer population and an even bigger population of so-called “echo-boom” children bracket a small, but nutritionally aware Generation X. Knowing the attitudinal designators of each group will help functional food manufacturers find the right mark for their products.

This article is based on the findings of the biennial HealthFocus® Trend Report, a national study of public attitudes and actions toward shopping and eating. This study is conducted every two years to identify current issues in consumer health and nutrition behavior and attitudes and to assess the trends in consumer priorities regarding nutritional issues. The results also help to develop an understanding of where consumers are headed in their behavior towards their health and diet. Data are collected from written questionnaires mailed to qualified respondents.

AN AMERICAN PORTRAIT

The absolutely average American is a white woman with at least some German ancestry. She is a 32.7-year-old married mother with 1.17 children. In 1999, her median household income was $39,100. She's a high-school graduate and is the owner of a three-bedroom home in the suburbs.

But while this distillation of Census Bureau data provides a nice snapshot, it is not going to help marketers reach their target. A better way is to take a look at the generational designators used by demographers who believe that age is the most important demographic indicator for consumer marketers. These are:

- The World War II Generation, people born before 1933. These children of the Great Depression grew up as soldiers in World War II. They are the most affluent senior generation ever, although not as well educated as later generations. Many members of the World War II generation found that they only needed a high school education to spell success. People of this generation are in their late 60s and older.
- The Swing Generation – people born between 1933 and 1945. This group was once called the Silent Generation; they are now some of the most powerful people in the country. These people are now between the ages of 54 and 66; Swing Generation men are CEOs and other top management people looking towards retirement with nest eggs bigger than most Baby Boomers can even dream about.
- The Baby Boom, the children of the post-war era who were born between 1946 and 1964. This is the largest generation to date, although the Millennials (see below) are quickly catching up. One thing that is indisputable is that boomers are probably the most influential generation in the country, at least for now. The oldest boomers are entering their 50s; Boomers range in age from 35 to 53.
- The Baby Bust/Generation X are people born between 1965 and 1976. It is a small generation – about 44 million, compared with the 76 million or so Boomers – the "trough" after the "peak" of Baby Boom years.
- The Millennial Generation is the most recent name for the

Echo Boom generation or Generation Y. They are, for the most part, the children of boomers. The generation, which includes people born between 1977 and the present, is just about as large as the boomer generation.

There are a number of noteworthy trends within the generation designations that inform many marketing decisions. The first one is the general aging of America. We as a nation are getting older. By 2015, the youngest Baby Boomer will turn 50; the oldest will be 70. That means that the Baby Boom market will also be the "Mature Market." The two groups will merge and there will be a lot of people in this new super-category – over 107 million, or 34 percent of the country's population, will be aged 50 and older in 2015.

A second trend is the increase of the so-called "sandwich generation." This is not really a "generation" but an interlude in the lives of Baby Boom, and Generation X, households. The sandwich happens when a household finds itself having to support not only children but also aging parents. With longer life expectancies in this country, and with many families having children late in life, it is not surprising to find a household spanning, and caring for, three generations. The period of sandwiching can be a great financial strain on a family. And with an increase in the size of the aging population, a lot of younger people will be footing the bill for a lot of seniors in years to come.

A SENSE OF ENTITLEMENT

The most defining trend for health and nutrition choice today is the evolution of a sense of entitlement among American shoppers. Rather than making decisions based on an either/or proposition, Americans today want all of the advantages. Not satisfied only with food that may taste good, for example, they are looking for foods that taste good *and* fill a nutrition need

HealthFocus® has identified five primary benefit platforms for marketing health and nutrition products to shoppers

- Prevention. Foods that provide health management through disease and symptom prevention fall into this category. The focus is on longevity with good health and good quality of life.
- Performance. A product that provides health enhancement through improved physical and mental condition. The focus is on daily health, accomplishment and success.
- Wellness. Wellness benefits are about feeling good and finding balance. The sense is a holistic approach to health care that includes the body, mind and spirit. The focus is on daily health needs, moderation and variety

- Nurturing. Foods that can supply a sense of caring for the health and quality of life for others and the associated sense of satisfaction for the caregiver. Marketing a product from this platform would include a focus on growth and development, aging and healing.
- Cosmetics. Cosmetic benefits are about looking good and enhancing self-esteem through improved physical condition and personal appearance.

ATTITUDES ABOUT HEALTH

Although a majority of respondents to the HealthFocus® study rate their diet as healthy or very healthy, fewer give themselves such high market these days as did in past years. Shoppers aged 65 and older are most likely to rate their diets very healthy or healthy (93 percent); shoppers between the ages of 18 and 29 are least likely (75 percent). When it comes to contemplating dietary improvement, shoppers between the ages of 30 and 39 are more likely than those in any other group to want to eat healthy foods more often (85 percent).

Younger shoppers are less likely to eat healthfully than older ones. While 58 percent of shoppers under the age of 30 always or usually make healthy food choices, 76 percent of shoppers between the ages of 50 and 64 and 82 percent of shoppers between the ages of 65 and 70 do the same. On the other hand, only 63 percent of 18-to-29 year olds always or usually eat healthy food.

A result of the increased media attention to the relationship between food and health is an increased sense of nutritional confusion. More than one-third of shoppers (37 percent) strongly agree or agree that they are often confused about what they should eat to stay healthy. Nutritional confusion increases somewhat with age.

Interestingly, most shoppers still prefer naturally nutritious foods to supplements or fortified foods: 93 percent of shoppers agree that it is important to eat foods that are naturally rich sources of key vitamins and minerals, compared to 62 percent who agree that supplements are important and 55 percent who feel the same about fortified foods. Attitudes about supplements have shifted significantly however up from 49 percent in 1994 to 62 percent in 1998 who agree that a daily supplement is important to good health.

More than one in five shoppers from each generation are extremely or very concerned about an acute health condition. As shoppers get older, they are much more likely to be concerned about heart disease, cancer, high cholesterol levels, osteoporosis and diabetes.

Other health concerns, such as stress and menopause, can also be charted across generations. While stress is a much bigger to concern to Generation Xers than it is to members of the World War II generation, concern about Alzheimer's disease is greater among older Americans. Not coincidentally, the generation most likely to worry about stress is also the generation in which there is the highest incidence of this health factor.

ATTITUDES ABOUT FOOD

Two-thirds of shoppers (66 percent) strongly agree or agree that their diet is very important to them. Almost half (47 percent) strongly agree or agree that they are very careful about that they eat.

One way in which shoppers watch the way they eat is to keep informed of health and nutrition information. Baby Boomers and Swing Generation shoppers are significantly more likely than others to rely on media sources for information, especially TV, radio and newspapers. Generation X is more likely to rely on advice from friends or relatives.

Another educational tool is the product label. Almost two out of three shoppers (63 percent) always or usually read labels on food packages. However, they are skeptical about what they see – 54 percent of shoppers don't believe many of the health claims on food packages. Shoppers between the ages of 50 and 64 are the most skeptical of any age group. They require more proof.

Over half of shoppers (54 percent) strongly agree or agree that foods can reduce their use of drugs or other medical therapies. Those who strongly agree (11 percent of all shoppers in the HealthFocus® study) are called "food as Medicine" shoppers. They are the core audience for many of the functional foods and neutraceutical product now coming on the market.

THE FUNCTIONAL FOOD MARKET: REACHING "FOOD AS MEDICINE" SHOPPERS

"Food as Medicine" shoppers strongly believe that foods can be used to reduce the use of drugs. They also strongly agree that foods contain active components that improve long-term health, and they always or usually (46%) choose foods for specific medical purposes. These shoppers cross all age designators, but are especially likely to be mid-lifers: 56 percent of shoppers between the ages of 30 and 70 are "Food as Medicine" shoppers, compared with 48 percent of shoppers under the age of 30 and 46 percent of shoppers aged 71 or older.

Marketing successfully to the "Food as Medicine" segment requires knowledge of their attitudes and expectations. For example, 78 percent of this segment always or usually read labels when shopping. They are significantly more likely than other shoppers to believe that the labels are regulated (48 percent, compared with 22 percent of other shoppers), but they are also more likely to be skeptical about label claims than others (24 percent, compared with 7 percent of other shoppers).

Not surprisingly, content claims and health claims on labels are both important to “Food as Medicine” shoppers. Like all shoppers, “Food as Medicine” shoppers consider “fresh” and “grown without pesticides” the most important label claims. Promises of a good source of calcium (67%), high fiber (62%), and a good source of antioxidants (62%) are also important to two out of three shoppers in this market.

“Food as Medicine” shoppers do not put as much extra importance on reduced fat claims as they do on other claims, however. What they are looking for, instead, are positive health claims. For example they favor “supports the immune system” (66%) over “may reduce risk of cancer” (60%) or “helps to maintain healthy cholesterol levels” (62%) over “may reduce risk of heart disease.” (59%)

Another key to reaching this segment is an understanding that this is a group that is extremely confident in its ability to manage its health. They are highly information oriented and interested in non-traditional health care practices. They have an extremely strong sense of control over their short-term health, their weight and their stress levels. They are less confident, but still much more so than other shoppers, in their ability to control their future health, including controlling their risk of getting cancer.

Four out of five (80 percent) “Food as Medicine” shoppers strongly agree or agree that they are knowledgeable about health and nutritional issues, compared with 59 percent of other shoppers. This is not to say, however, that they feel in total control – 38 percent strongly agree or agree that they are often confused about what they should eat to stay healthy.

Keys to marketing functional foods can be summarized as follows:

- Understand your audience: The best market for functional foods are the “Food as Medicine” shoppers, who are well-educated, well-informed mid-lifers.
- Product information and health claims about specific functional foods should be presented in a number of iterations – on product labels, in the media, at doctors’ offices.
- Skepticism about functional food products will always

exist, but education is key. “Food as Medicine” shoppers want to take care of themselves; functional foods provide one of the answers. But healthy eating, and deriving adequate nutrition and health protection from natural sources are also strong trends. It may be necessary to market functional foods as just one of the ways to take better care of one’s self.

- An aging Baby Boom population and a growing senior population are important markets for functional foods. Boomers transitioning to their senior years will take their healthy lifeways with them.

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Shoppers Reaching Beyond Basic Nutrition for Better Health
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Beverage R&D

Shopping for health in the next millenium will mean more than meeting daily requirements or controlling weight. Almost three out of four shoppers expect that the nutrition products they buy and use can provide active components that help with current health, reduce their risk of diseases, and improve their long term health.

Broccoli and Vitamin C are the top functional nutrition picks for shoppers today. According to the latest HealthFocus Trend Survey*, 62% of shoppers have heard a lot or some about broccoli and cancer prevention, and 56% are trying to eat more broccoli in order to reduce their risk of disease. Similarly, 60% have heard about Vitamin C and cancer prevention, and 56% are trying to eat more oranges or drink more orange juice .

This isn’t so surprising when you consider that 79% of shoppers are interested in learning more about cancer preventing chemicals in fruits, vegetables and grains. Or, that "eating more fruits and vegetables" has become their first priority for improving the healthfulness of their diets, pushing "eating less fat" down to fourth priority.

Other functional items on today’s shopping lists include fish, spinach and other dark leafy greens, tomatoes and tomato sauce, garlic and oat bran. Efforts to eat more oat bran increased the most, growing from 31% of shoppers trying to get more oat bran in 1996 to 41% in 1998. Clearly, the oat health claim has had a significant impact on consumer behavior.

Items HealthFocus expects will be showing up on more shopping lists in the future include ginseng, gingko, folic acid, soy, and phytochemicals.

Businesses targeting the Positive Nutrition trend must shift their communications and product solutions to emphasize the goodness of foods. Other key rules to keep in mind are:

1. TASTE rules. Healthy products are only as good as they taste.
2. Deliver POSITIVE NUTRITION, with little or no down-side. Shoppers tell us if it *might* work, but definitely *won't* hurt, they'll give it a try.
3. Customize for nutritional individualization. 72% of shoppers agree that their nutritional needs are different from everybody else's needs. One in five strongly agree.
4. Give shoppers reinforcement and credit for what they are already doing right. Most shoppers believe they have already made substantial changes to improve the healthfulness of their own and their family's diets and now want to make only small, gradual improvements.
5. Make it FAMILIAR. The biggest home runs will come from products and solutions that are comfortable for shoppers and fit into their lifestyles without big changes.
6. Keep it SIMPLE. Don't overburden shoppers with too much information.
7. Use NATURAL ingredients or imagery. Natural has its own aura of goodness in the consumer's mind. Perceptions are that natural is simpler and more wholesome.
8. The FRESHER, the better. Fresher generally translates into higher quality for shoppers. Functional nutrition products that deliver better freshness can often deliver more believability for the functionality of their product and its ingredients.
9. Build in PORTABILITY, PACKABILITY and PORTION CONTROL. Shoppers want products that they can eat on the run, and pack in a purse or briefcase (without crushing, bruising, or spoiling when forgotten). Portion control appears to be critical,

for functional products, where dosage is an issue for shoppers.

10. Develop SOLUTIONS, not products. Shoppers today are more willing to pay a premium for benefits and solutions that simplify their lives, than they are for better nutrition alone. Consider benefits in five areas for functional products: Prevention, Performance, Wellness, Nurturing, and Cosmetics.