The Functional Food Trend: What's Next And What Americans Think About Eggs

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Objective: The HealthFocus® National Study of Public Attitudes and Actions Toward Healthy Foods is conducted every two years to identify current issues in consumer health and nutrition behavior and attitudes, to assess the trends in consumer priorities and to develop an understanding of where consumers are headed in their behavior towards their health and diet. This paper focuses on consumer interests in functional nutrition for disease prevention and health enhancement. It examines the role consumers see for eggs in healthy diets.

Methods: The data for this study were collected from written questionnaires completed by 2,074 qualified respondents in August, September and October of 1998. The research was conducted in two stages: 1. A telephone pre-recruit from a national probability sample of households qualified respondents as Primary Grocery Shoppers (those who make most of the food buying decisions for their household or who equally share that responsibility). 2. A 12-page, self-administered questionnaire was mailed to qualified respondents. Respondents to this survey represent shoppers in the U.S. in all respects except race. Women account for 81% of the survey respondents, since they do most of the household shopping.

Results: Most shoppers believe foods can offer benefits that reach beyond basic nutrition to functional nutrition for disease prevention and health enhancement. As consumers better understand the functional benefits of eggs, from Prevention to Performance, Wellness, Nurturing and Cosmetics, eggs will continue to play an important role in healthy eating for many consumers.

Conclusions: Eggs are considered a healthy food by most consumers as long as they are eaten in moderation. Increased egg consumption is being driven by consumer interest in health benefits that reach beyond dietary avoidance strategies to positive nutrition strategies. 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.

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 and the like.
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 of or equally share in the food buying decisions for their households. 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. Each year 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

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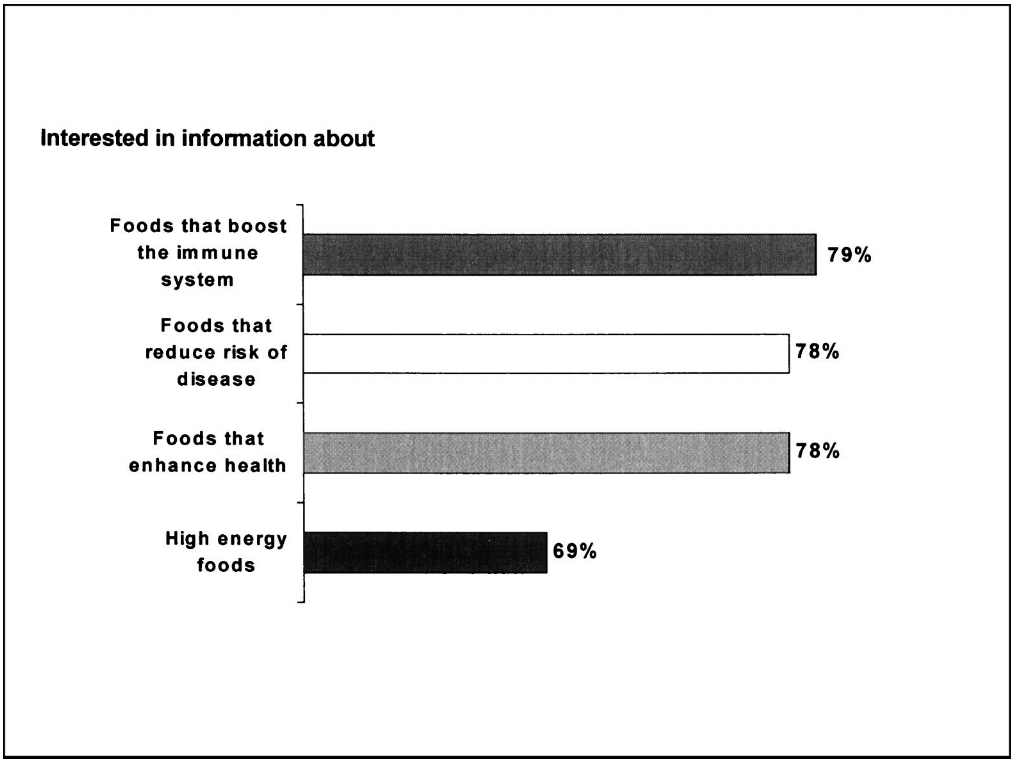

Fig. 1. Shoppers are looking for a variety of health benefits from the foods and beverages they buy and use. Foods that boost the immune system, reduce disease risk and enhance health have appeal for more than three out of four Americans.

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 healthily 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 in 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 more healthily 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 into the marketplace. Shoppers have a growing desire 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.

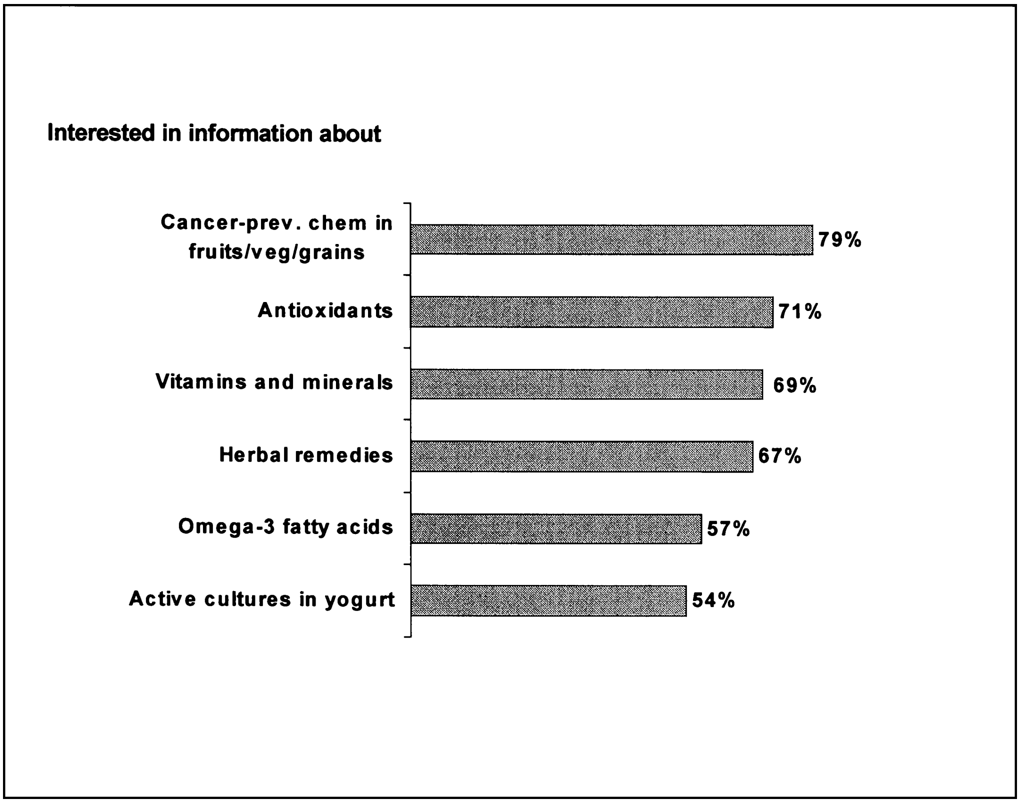

Fig. 2. More than half of shoppers are interested in learning more about GFY components of foods, from the cancer preventing chemicals in grains and produce, to herbal remedies, to active cultures in yogurt.

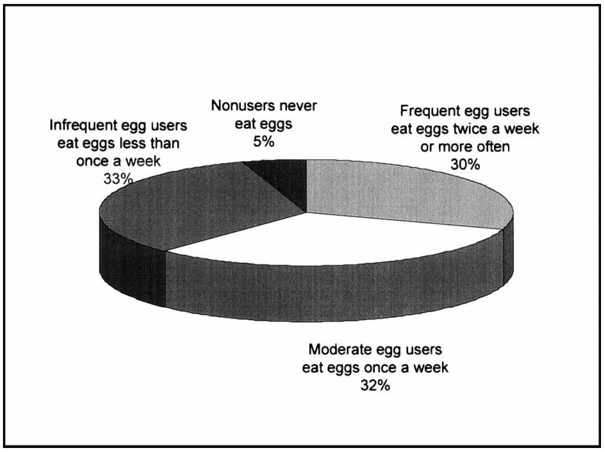

Fig. 3. 62% of shoppers eat eggs weekly, up from 59% in 1992.

3. Nutritional Individualization. Almost three out of four (72%) shoppers agree that everyone has different nutritional needs from everyone else; one in five (19%) shoppers strongly agrees. 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 customize their products for shoppers in nutritionally logical ways. 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, shoppers are changing significantly their attitudes about the importance of supplements and nutritionally fortified foods and beverages. 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 those gaps, marketers can spur interest and influence behavior.

Table 1. Frequent Egg Users Are Generally Younger and Are More Likely to Have Children at Home Than Nonusers. Most Frequent Egg Users Are Ages 40 to 64 years (47%)

	Frequent Users	Moderate Users	Infrequent Users	Nonusers
Men	21%	17%	18%	28%
Women	79%	83%	82%	72%
Age 18–39 yrs	35%	31%	36%	23%
Age 40–64 yrs	47%	49%	46%	53%
Age 65+ yrs	17%	19%	18%	28%
High school or less	35%	36%	29%	33%
Some college or more	65%	65%	72%	67%
HH Income $25K or less	34%	25%	27%	30%
HH Income $25,001 to $50K	38%	37%	38%	44%
HH Income $50,001+	28%	38%	36%	25%
Have no children	61%	65%	64%	75%
Have 1–3 children	36%	23%	23%	25%
Have 4 or more children	4%	2%	2%	—

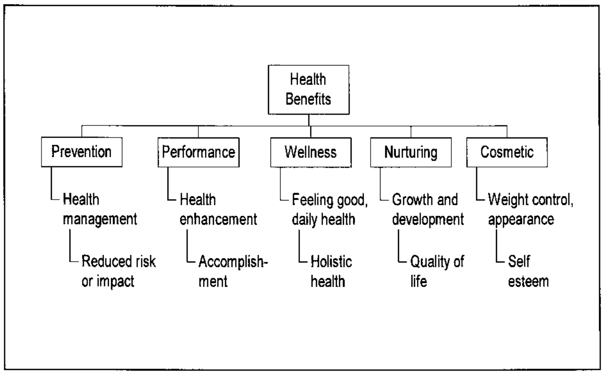

Fig. 4. HealthFocus has identified five primary benefits for consumers interested in functional products. There is a fit in consumers' minds for eggs across all five benefits.

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 at the result of 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 employed to reduce their use of some drugs and other medical therapies. 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 shoppers (10%) 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 from 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 three out of four Americans (Fig. 1).

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 (Fig. 2).

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 two in three shoppers today eat 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 (Fig. 3).

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 households with no children) (Table 1).

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 (Fig. 4).

Prevention. (29% are frequent egg users.) Prevention benefits involve 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 age-related macular degeneration (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 involve 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 involve 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 (Fig. 5).

Cosmetic. Cosmetic benefits involve looking good and the sense of self esteem associated with looking good. Cosmetic benefits include weight management and healthy skin, hair and

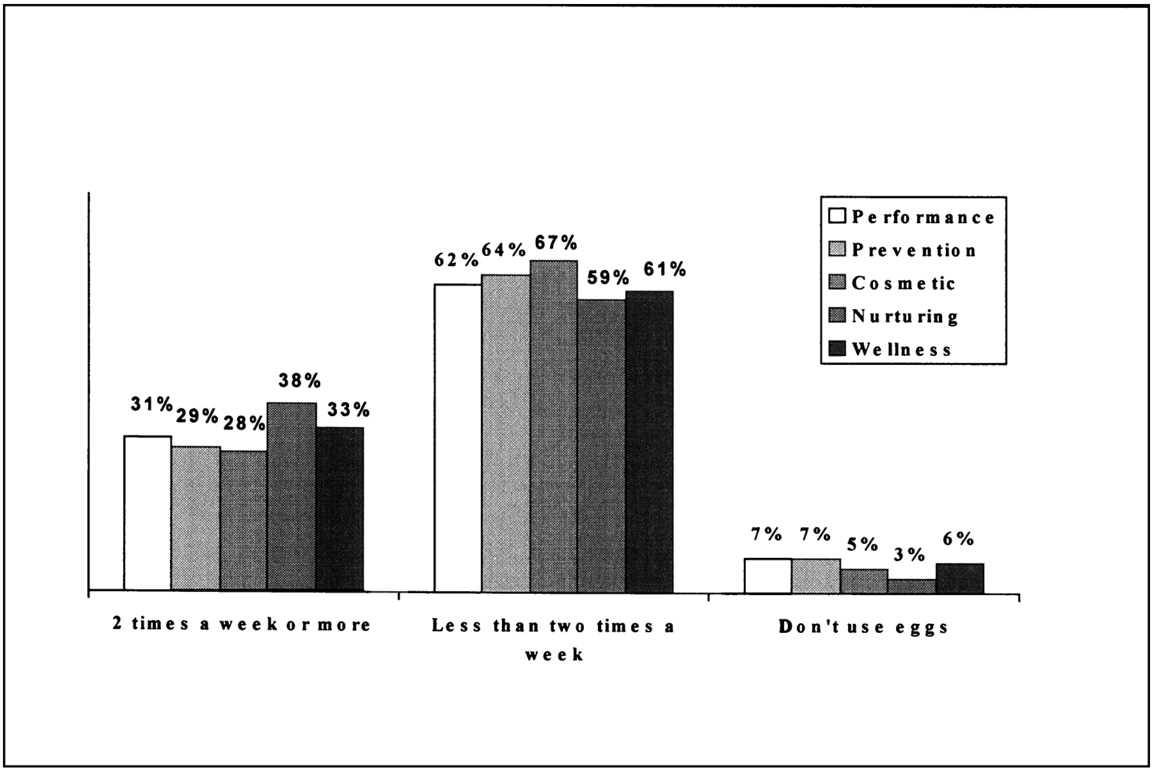

Fig. 5. Shoppers who are strongly oriented to Nurturing Benefits are the most likely to be frequent egg users.

Table 2. The Media Is the Primary Source of Health and Nutrition Information for Consumers

	Frequent egg users	Moderate egg users	Infrequent egg users	Don't use eggs
Food labels	42%	47%	47%	59%
Physicians/doctors	38%	38%	38%	39%
TV/radio	32%	33%	31%	30%
Friends/relatives	30%	32%	34%	30%
Women's mags	28%	33%	31%	14%
Newspaper	23%	21%	20%	18%
Advertisements	21%	21%	21%	20%
Health magazines	20%	15%	20%	24%
Registered dietitian	14%	9%	8%	9%
Other health practitioner	9%	9%	9%	7%
Other magazines	8%	7%	7%	3%
Internet/computer	6%	5%	4%	5%

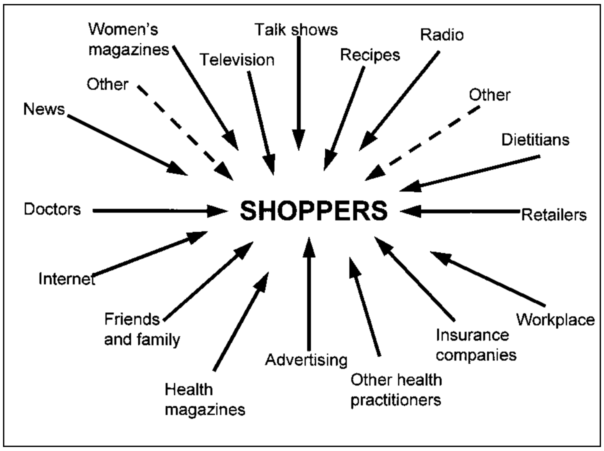

Fig. 6. Knowledge-based marketing strategies surround customers with information from a variety of sources.

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 physicians are widely used information sources, but when all media sources are netted together, the media are the most powerful information sources. Whether the shopper is watching TV, listening to the radio, reading magazines or newspapers or noting advertisements, the media are 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 (Table 2).

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 those which are knowledge-based.

Knowledge-based marketing strategies will be key to success in the new millennium—especially for brands that lead their categories. It is effective strategy to surround a customer with information from a variety of sources including point of purchase, news, popular media, health media, advertising, health experts and more (Fig. 6).

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 within the framework of what they already know. Consumer-friendly messages build from familiar knowledge to the unfamiliar. Consumers ask the following: 'How much do I need (for the desired functional benefit)?' 'How much is in it 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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