



Perception and insights on fats and fatty acids: knowledge of fat quality of the diet

Background

- Research indicates that consumers nowadays are very aware of their health and the major role nutrition plays in this.*
- Consumers actively look for information on nutrition. The question is whether this has resulted in a better understanding of the role of nutrition in their health.
- This piece of consumer research was performed to gain insight into the degree of consumer knowledge and confusion about nutrition, with emphasis on the role of fats.

* Source: The American Journal of Clinical Nutrition, 2006;83:1272–5.

Objectives

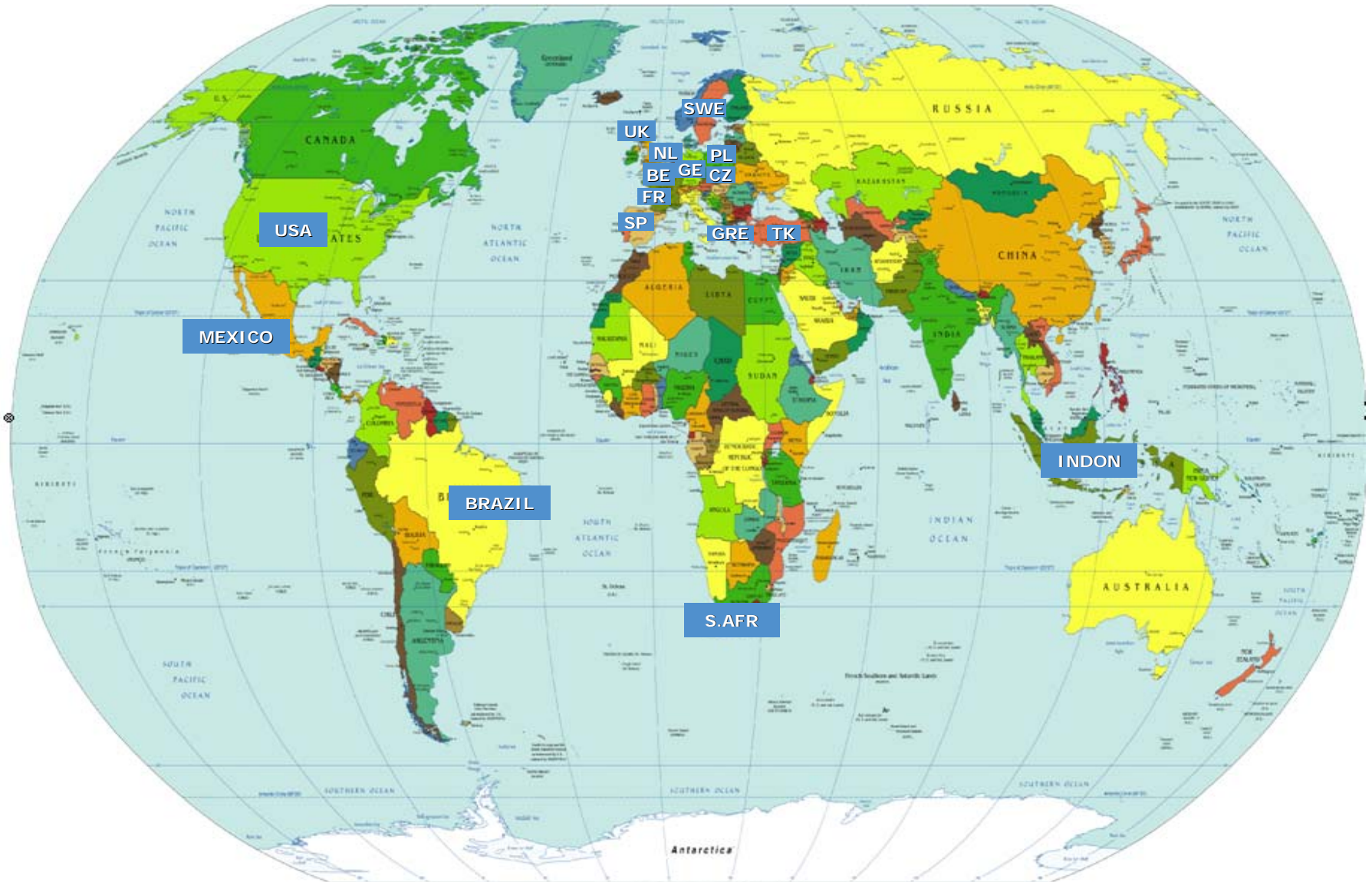
The objectives of this research were to gain an understanding of:

- Consumers knowledge of fats in general, and specific fats
- Consumers attitudes towards the topic of fat
- What consumers think of the role of fat in the diet
- Which foods consumers believe provide the different fats

Study population

- The research was carried out in 16 countries
- Interviews were conducted in two periods:
 - Nov-Dec 07 (wave 1)
 - Aug-Sept 08 (wave 2)
- How:
 - Telephone and face-to-face interviewing (wave 1)
 - Internet and face-to-face interviewing (wave 2)
- Who:
 - Chief shoppers (those who personally select items for their household half or more than half of the time), aged 18-70
- How many:
 - 200 per country per wave

Study population: 16 countries



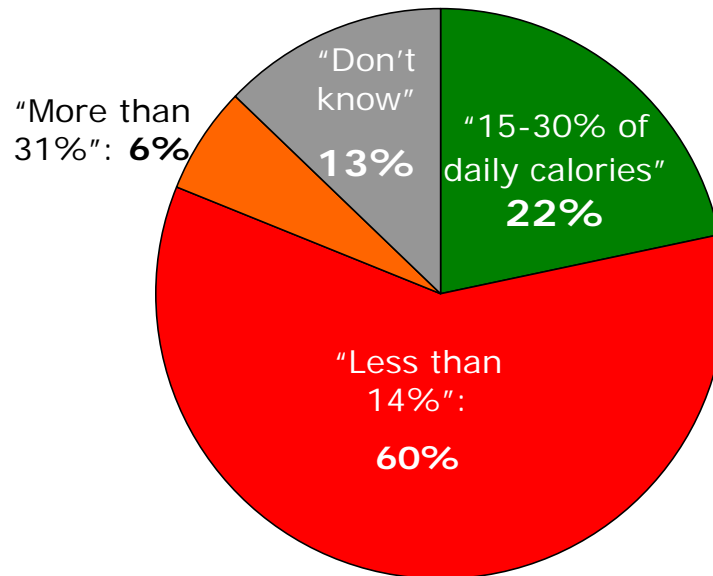


Results: Fat as a part of a healthy diet

How much fat do consumers think is needed for a healthy balanced diet?

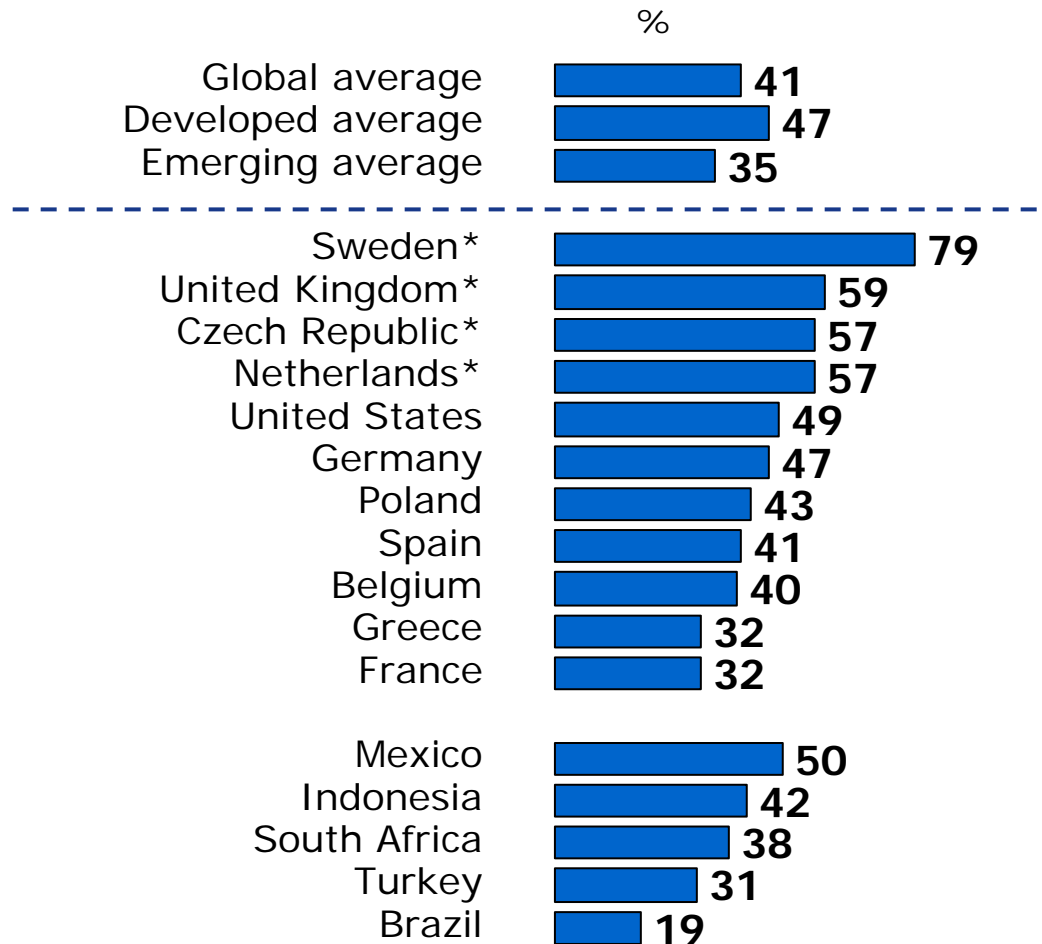
Global Average

Of my daily calories, from fat I should have...%



60% think that fat should deliver 14% of the daily energy, or less.

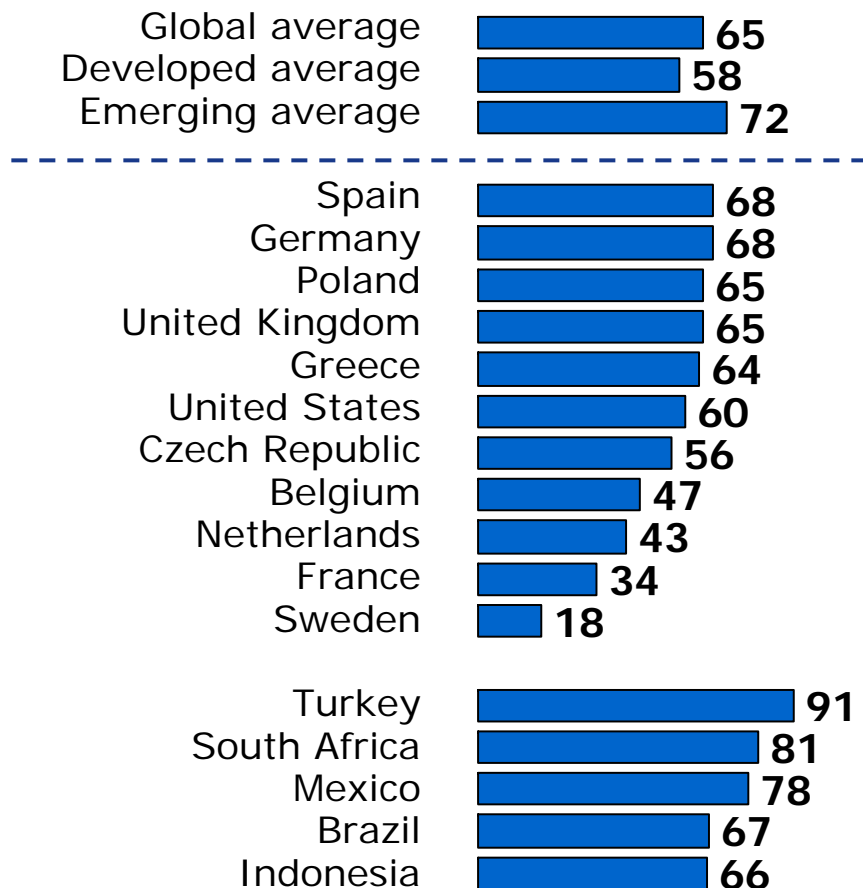
Do consumers think that fat is part of a healthy balanced diet?



Only in some countries do consumers agree that fat needs to be part of healthy diet.

Do consumers agree that a low fat diet is a healthy diet?

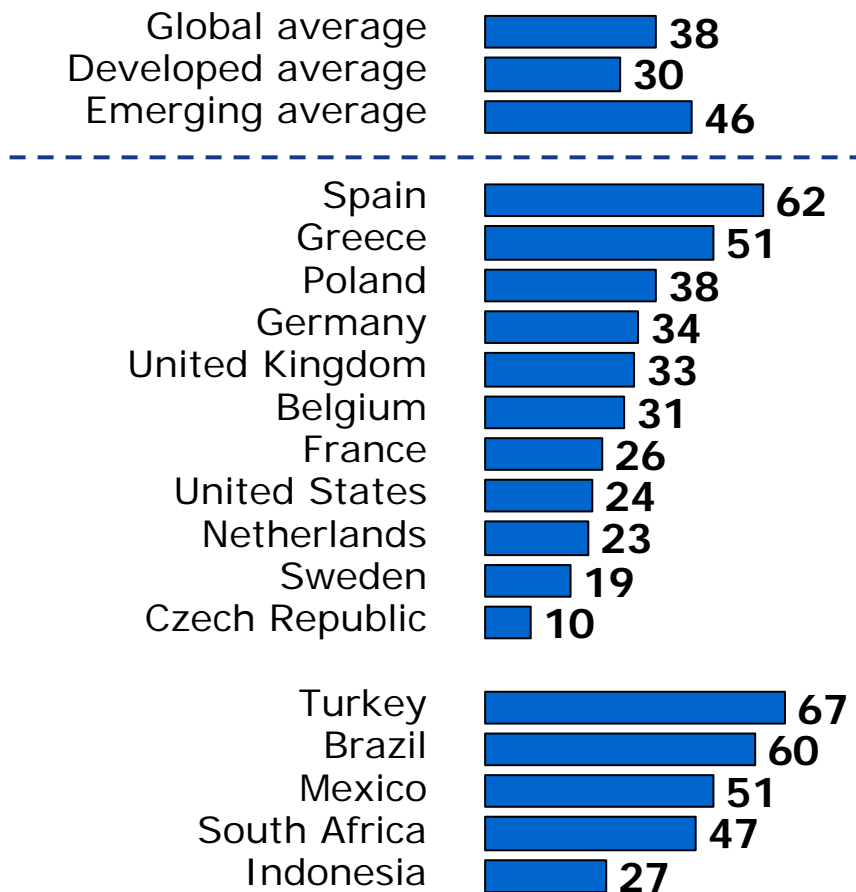
A low fat diet is a healthy diet % agree



65% think that a low fat diet is a healthy diet.

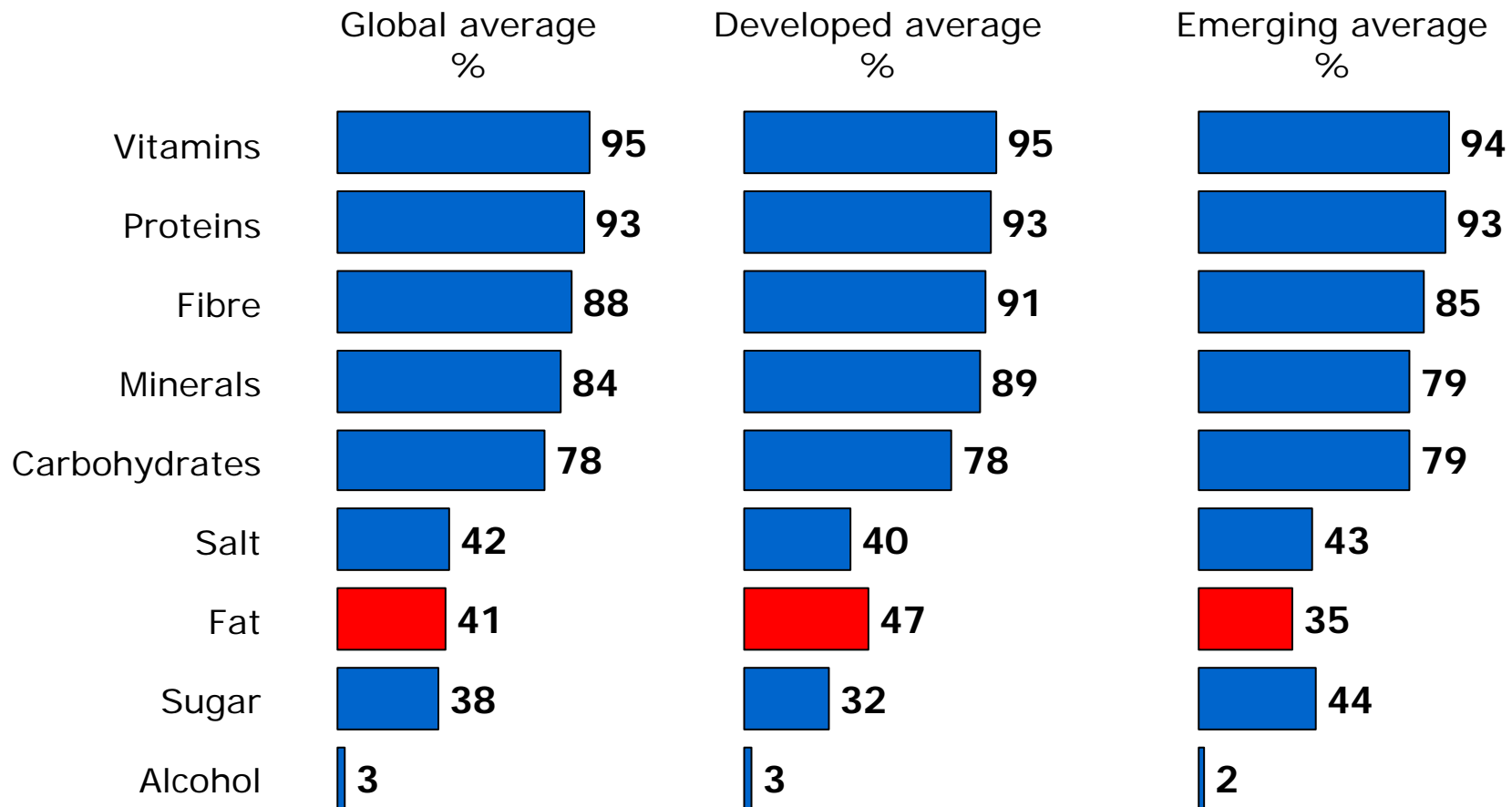
Do consumers avoid foods containing fat?

I avoid food containing fat % agree



38% claim to avoid foods containing fats.

What foods do consumers think are needed for a balanced diet?



Vitamins, proteins, fibre, minerals and carbohydrates are elements of a balanced diet. Fats are not.

Some real life consumer quotes on a healthy diet

*'I don't care
as long as it
tastes OK'*

*'I try and justify
the lack of a
healthy diet by
being more active.'*

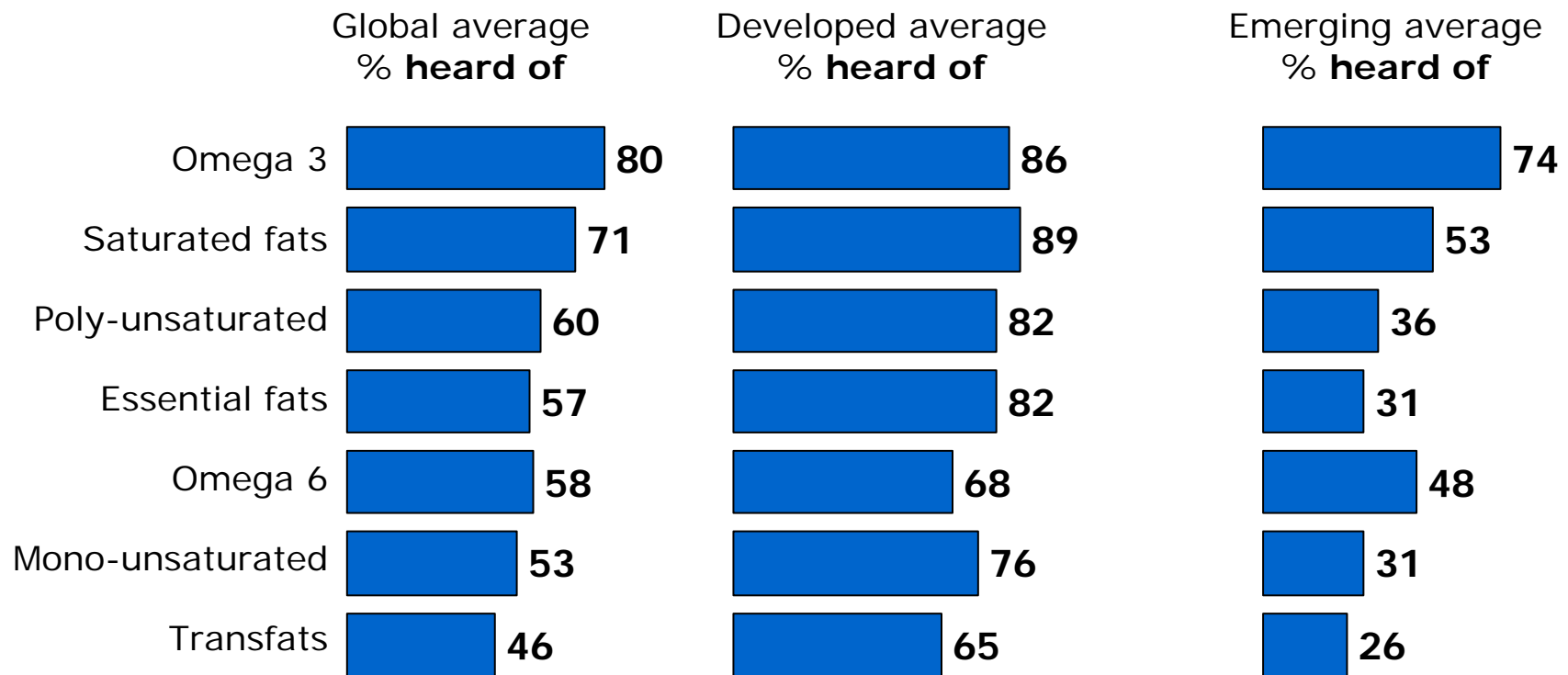
*'I am quite ignorant on
eating healthy and I
think a lot of people are
ignorant as to what you
are supposed to eat and
how many calories you
are supposed to have.'*

*'If it says
low in fat,
you are
drawn to it
then really'*



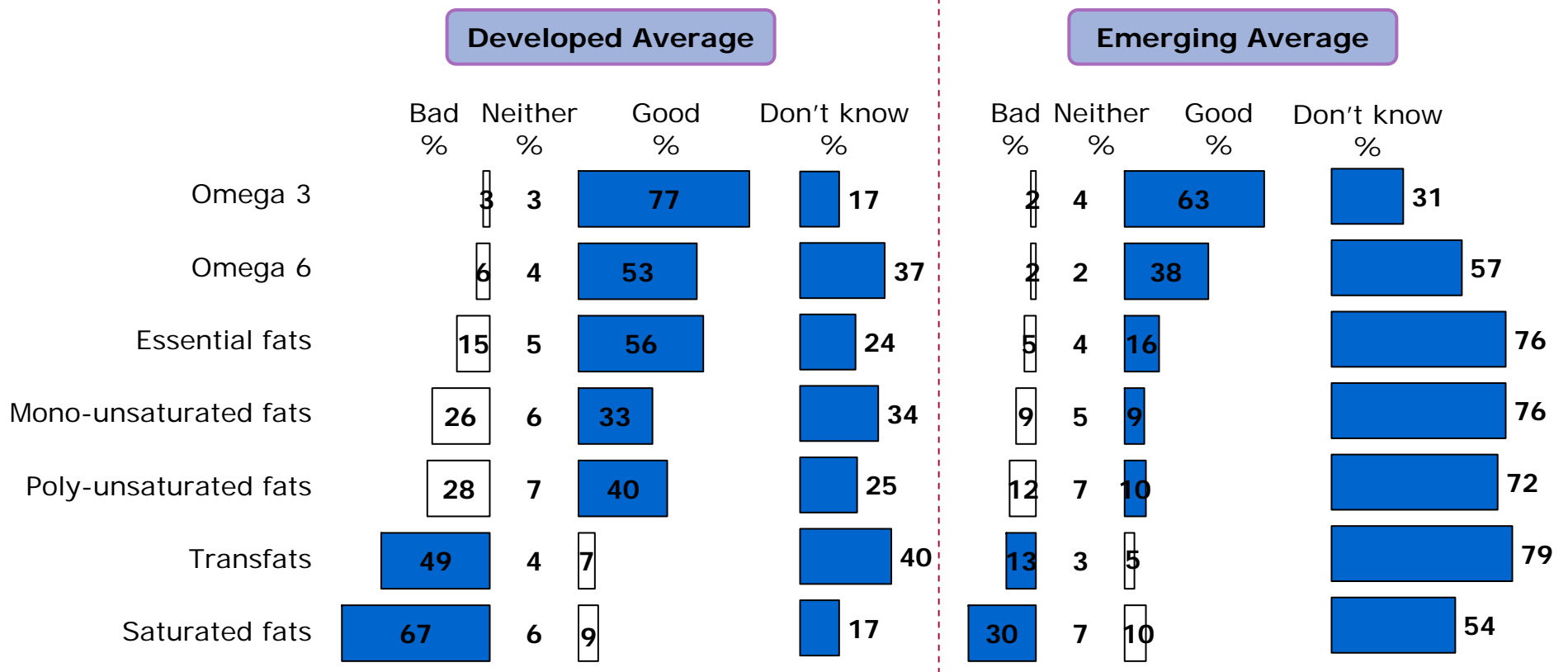
Results: Different types of fat
Where can you find them & what do they
do?

Have consumers heard of different types of fat?



Consumers have heard of different types of fats, especially omega 3 and saturated fats – but less in emerging markets

Do consumers know what types of fat are good or bad?



In general, consumers knowledge is low – especially in emerging markets. They typically know that omega 3 is 'good' and saturated fats are 'bad'.

Whether fats are good or bad for you - Wave 1

Q - Now please tell me if you think each of the following types of food or components of food are good or bad for you. Do you think ... is good or bad for you?

Some real life consumer quotes on types of fat

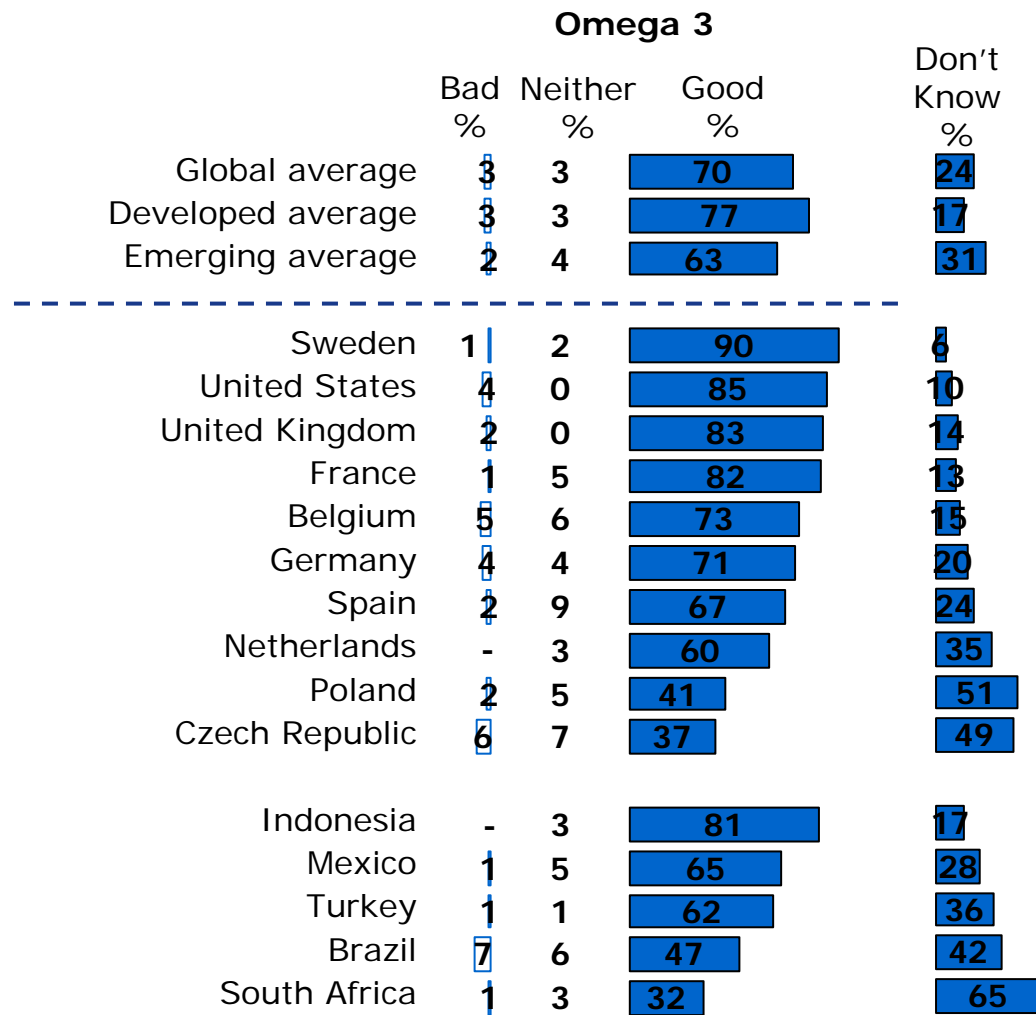
*Unsaturated,
saturated... one of
the two is good..*

*You hear so much
that you don't
know what to
believe anymore*

*'Education and information I
honestly don't know what
saturated fat and what
unsaturated fat is and how much
saturated fat on a daily basis is
good for me how much
unsaturated fat I still don't know
the difference. So for me it is
about education and information'*

*It's a matter
of
terminology,
not of health*

Do consumers know whether omega 3 is good or bad?



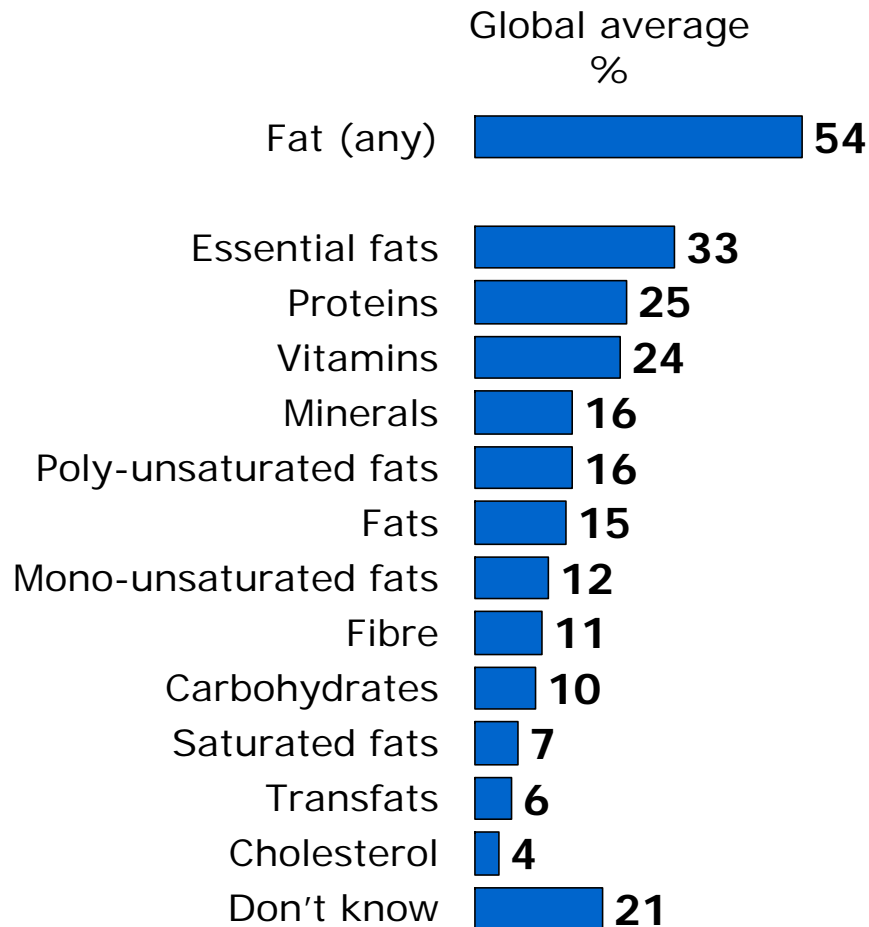
70% think that omega 3 fats are good, but with large variation between countries.

Whether fats are good or bad for you - Wave 1

Q - Now please tell me if you think each of the following types of food or components of food are good or bad for you. Do you think ... is good or bad for you?

What do consumers think omega 3 and omega 6 are?

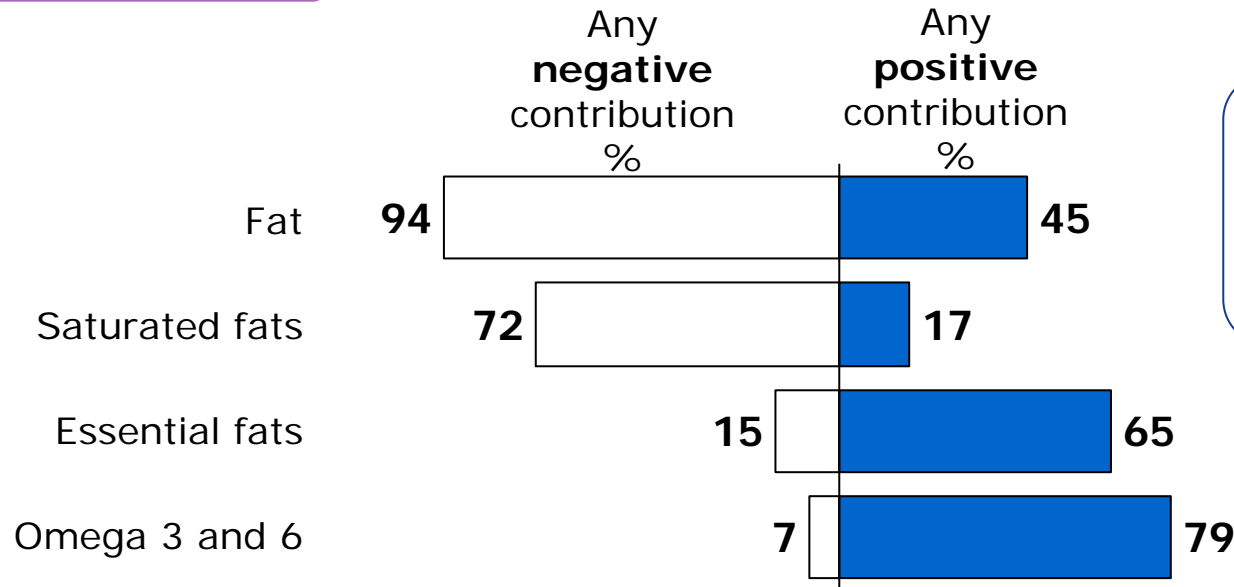
Omega 3 & 6 are...



Only 54%
knows that
the essential
fats omega 3
and omega 6
are fats!

To which effects do consumers link fats?

Global Average



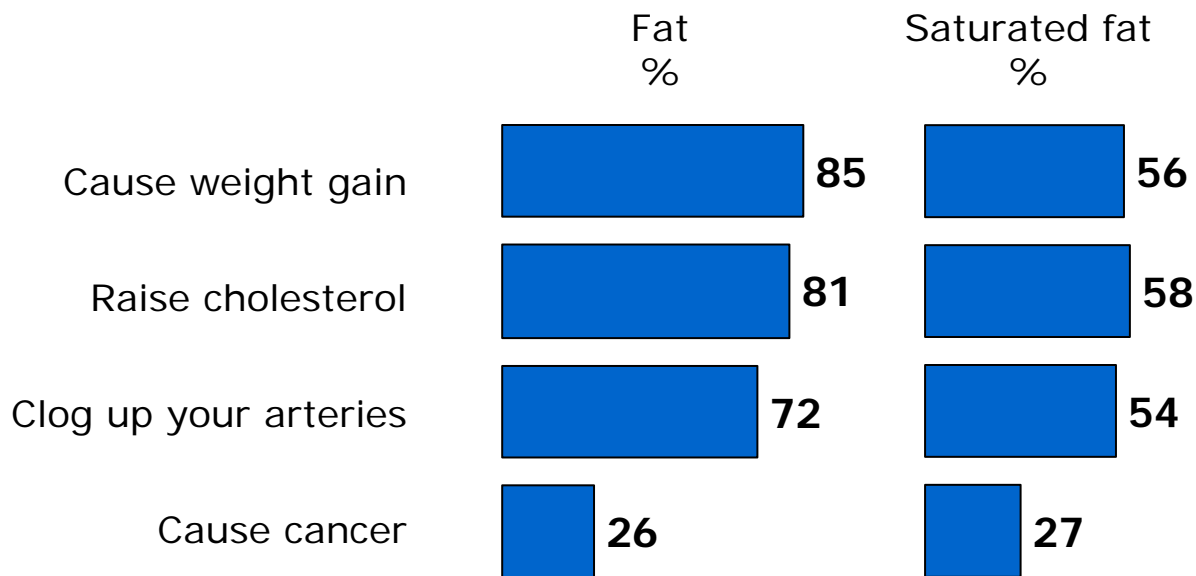
'Fat' is seen to do bad things to the body

Negative
Cause weight gain,
Clog up your arteries,
Raise cholesterol,
Cause cancer

Positive
Provide vitamins,
Help with optimal cell growth and renewal,
Help keep your heart healthy,
Keep you feeling full for longer,
Help keep your skin and hair healthy,
Help brain and nerve cells function well,

What negatives are fat & saturated fat associated with?

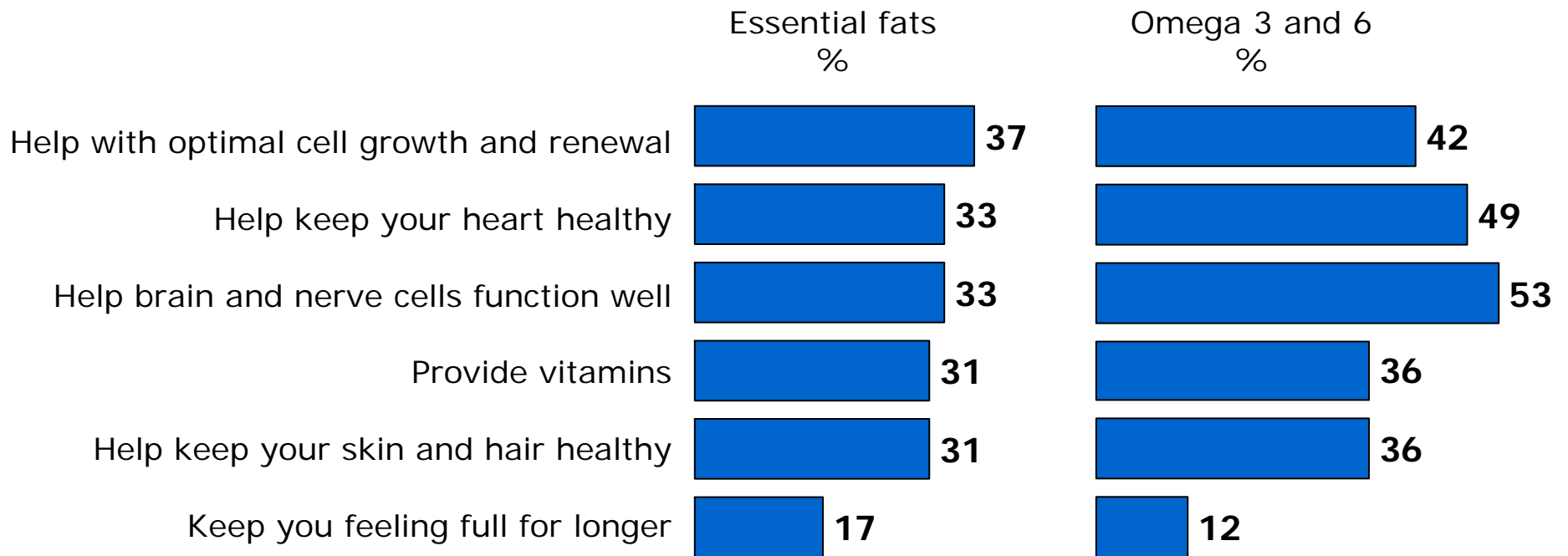
Global Average



Fat & saturated fat
have similar
negative
associations

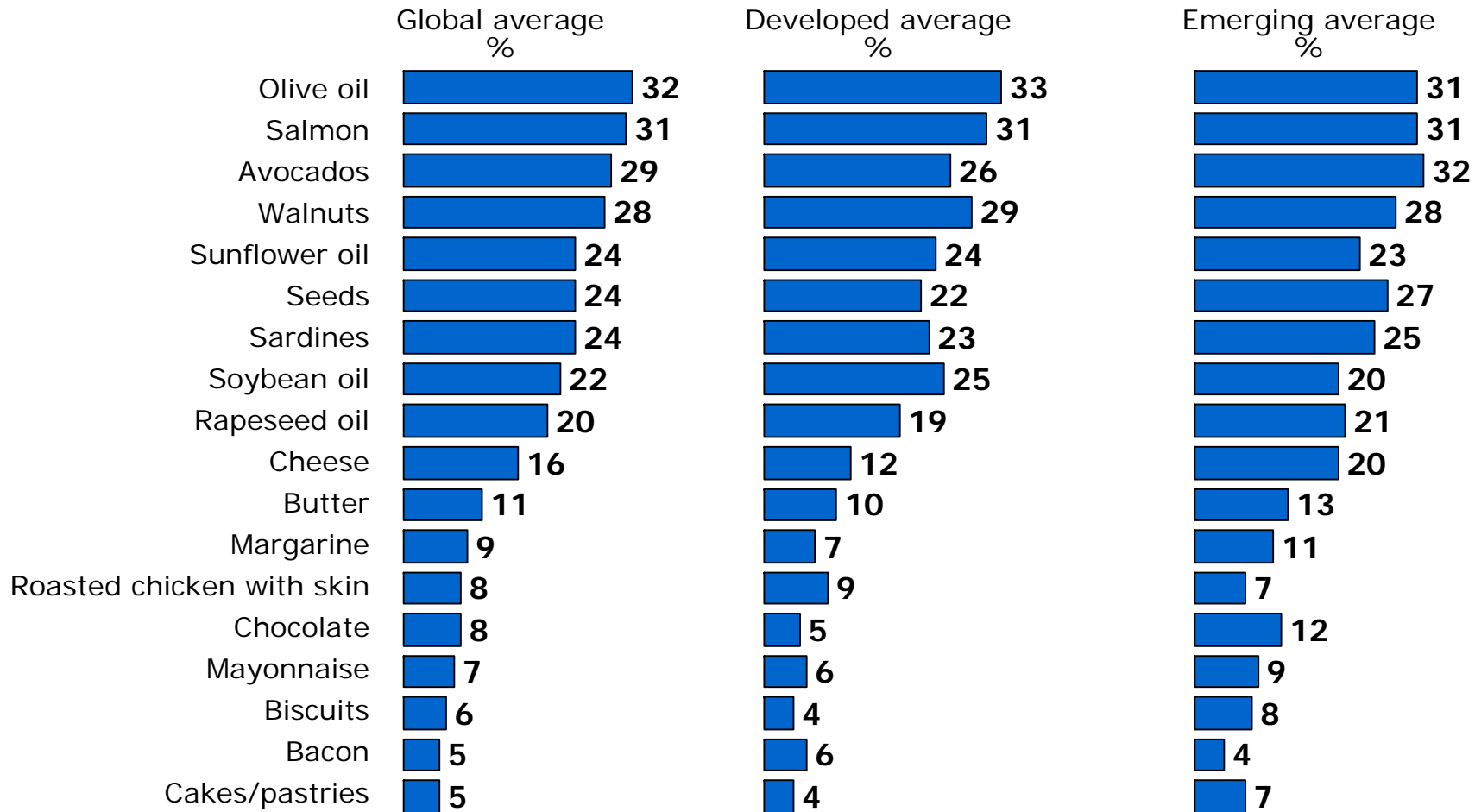
What positives are essential fats and omega 3/6 associated with?

Global Average



Essential fats and omegas are seen to have a range of benefits but at low levels

Where do consumers think they can find essential fats?

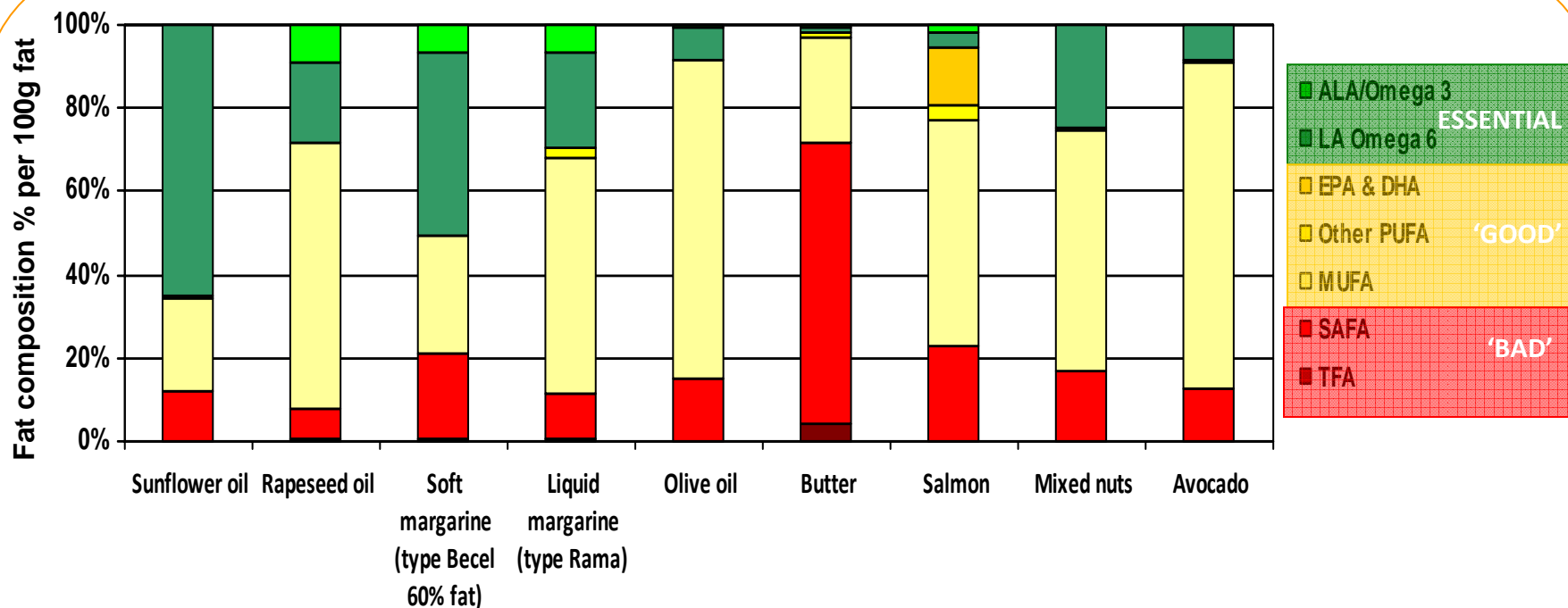


Consumers can identify products with a healthy image, but cannot identify sources rich in essential fats.

Knowledge of foods providing Essential fats – Wave 2

Q - Now thinking about FAT which of these foods do you think are among the main providers of FAT? Please click on all those you think apply.

Sources of essential fats



Compared to products which have a healthy image (like salmon, avocado and nuts) vegetable oils and margarines are better sources of essential fats. In addition, margarines can easily be consumed on a daily basis, which might be more difficult for fatty fish. Butter is not a good source of essential fats.



Discussion and conclusions

Discussion points – possible weaknesses of the research

- **Complicated subject matter**, resulting in challenging questions being asked of consumers
- **Different methodologies** have been used (phone, internet, face to face) to best match the needs of the country (should cause less concern given the factual nature of the questions)
- For a **Global study, Asia is under-represented** given its large population
- **Wave 1 had no quotas** to make the sample representative

Discussion points – strengths of the research

- **Large** - one the largest studies on fat to date - (n= 3200)
- **Recent** - wave 2 research being conducted within the last 6 months, and wave 1 just over a year ago
- Coverage of large **range of geographies**; there is a good representation of both **developed and emerging markets** and all continents represented to some degree
- **Carefully constructed questionnaire** to ensure fats are considered in the context of other nutrients and in the context of a balanced diet. Questions are carefully phrased to ensure, while complex, they can be understood and responded to by consumers
- The **methodology was considered on a country by country basis** to ensure it reached a broad population. Where internet research was conducted, the online panels were carefully chosen to ensure people couldn't self select for the interview

Summary - Fat as a part of a healthy balanced diet

- 59% of consumers do NOT think that fat is part of a healthy diet;
- 65% of consumers think that a low fat diet is a healthy diet;
- 38% of consumers claim to avoid foods containing fats
- In the minds of consumers, vitamins, minerals, proteins, fibre and carbohydrates are needed to have a healthy balanced diet, but not fat.

Summary - Different types of fat; Where can you find them and what do they do?

- Consumers, have heard of many different types of fats (especially in developed markets) but their knowledge is low. They typically know that omega 3 is 'good' and saturated fats are 'bad';
- Only 54% know that the essential fats omega 3 and omega 6 are fats!
- The word 'fat' is associated with saturated fats not essential fats
- Fat is mainly loaded with negative health attributes
- Consumers can identify products with a healthy image, but cannot identify sources rich in essential fats.

Conclusion

Many people don't know that fat is a part of a healthy diet.
Even in developed markets there is still a need to educate people that
fat is part of a healthy diet.

As it is clear that people are confused, the messaging needs to be
simple.



Appendix



METHODS: Data Analysis

Global average and cluster averages have been weighted according to population size

GLOBAL average:

	%
Belgium	0.82
Brazil	14.38
Czech Rep.	0.80
France	4.93
Germany	6.36
Greece	0.86
Indonesia	17.91
Mexico	8.24
Netherland	1.27
Poland	2.95
South Africa	3.70
Spain	3.49
Sweden	0.71
Turkey	5.46
United Kingdom	4.68
USA	23.44

CLUSTER averages:

DEVELOPED countries average:

	%
Belgium	1.63
Czech Rep.	1.59
France	9.80
Germany	12.63
Greece	1.71
Netherlands	2.52
Poland	5.86
Spain	6.95
Sweden	1.41
United Kingdom	9.31
USA	46.60

EMERGING countries average:

	%
Brazil	28.95
Indonesia	36.04
Mexico	16.58
South Africa	7.45
Turkey	10.98

Study Population - notes

- Sample structure:
 - Chief shoppers (those who personally select items for their household half or more than half the time)
- Wave 2 -
 - Quotas for age
 - 18-34 year olds
 - 35-54 year olds
 - 55-70 year olds
 - Quotas for gender (male/female). Gender quotas are not reflecting national proportions as chief shoppers are predominantly female, but do reflect national proportions within this universe.
- Wave 1 – no quotas were set as this was part of ongoing research. As this was done via telephone rather than internet it was felt that proportions would fall out more naturally
- Methodology used:
 - face to face interviewing used mainly in emerging countries
 - telephone and internet interviewing used in most developed countries

METHODS: Study Population & Data Collection – Wave 1

	Total sample	Quotas achieved					Methodology
		Male %	Female %	18-34 year olds %	35-54 year olds %	55-70 year olds %	
Belgium	200	25	75	16	53	31	Phone
Brazil	200	50	50	35	45	20	Phone
Czech Rep.	200	17	83	21	38	41	Phone
France	200	25	75	20	53	27	Phone
Germany	200	26	74	19	48	33	Phone
Greece	202	20	80	37	38	25	Phone
Indonesia	200	8	92	48	39	13	Face to face
Mexico	200	48	52	53	37	10	Phone
Netherlands	200	26	74	14	45	41	Phone
Poland	202	14	86	14	51	35	Phone
South Africa	200	0	100	51	29	20	Face to face
Spain	200	20	80	16	61	23	Phone
Sweden	200	33	67	24	47	29	Phone
Turkey	210	18	82	31	57	12	Phone
UK	200	27	73	26	48	26	Phone
USA	200	22	78	11	53	36	Phone

METHODS: Study Population & Data Collection – Wave 2

	Total sample	Quotas achieved					Methodology
		Male %	Female %	18-34 year olds %	35-54 year olds %	55-70 year olds %	
Belgium	200	30	70	34	43	23	Web
Brazil	200	26	74	46	35	19	Web
Czech Rep.	200	30	70	35	38	27	Web
France	200	35	65	34	42	24	Web
Germany	200	25	75	27	44	29	Web
Greece	201	31	69	40	43	17	Web
Indonesia*	200	25	75	48	40	12	Face to face
Mexico	203	51	49	39	39	22	Face to face
Netherlands	200	30	70	31	44	25	Web
Poland	200	40	60	39	41	20	Web
South Africa	200	40	60	25	45	30	Face to face
Spain	200	26	74	29	43	28	Web
Sweden	200	30	70	32	40	28	Web
Turkey*	208	25	75	31	58	11	Face to face
UK	200	33	67	33	40	27	Web
USA	200	41	59	39	41	20	Web

*Gender not to national proportions. Chief shoppers are predominantly female, but we wanted to ensure some male representation

METHODS: Questionnaire details

Wave 1 (top line information)

- Type of fats heard of (Saturated fats, Poly-unsaturated fats, Essential fats, Mono-unsaturated fats, Omega 3, Omega 6)
- Whether fats are considered 'good' or 'bad'

Wave 2 (detailed information)

- Level of agreement with statements regarding consumer attitude & behaviour towards fats
- Nutrients required for a healthy balanced diet (Fat, Proteins, Carbohydrates, Vitamins, Minerals)
- What foods are the main providers of these nutrients
- The amount of fat required for a healthy balanced diet
- Types of fats we should have more of and should have less of
- Main food providers of these fats
- The benefits of fats for the body

Significance of data

In using a sample to represent a total population there is an acceptance that there is variability around the actual % seen. This table guides us as to where the result falls around the actual reported % at 95% confidence.

%	Single country sample -/+	Global average -/+	Developed average -/+	Emerging average -/+
0 – 10	3	1	2	2
11 – 20	5	2	3	3
21 – 30	6	2	3	3
31 – 40	7	2	3	3
41 – 50	7	3	4	4
51 – 60	7	3	4	4
61 – 70	7	2	3	3
71 – 80	6	2	3	3
81 – 90	5	2	3	3
91 – 100	3	1	2	2

For example, in South Africa 13% are aware of Transfats. This means that the true result could be anywhere between 8% and 18%