



The Nutrition-Conscious Global Shopper

Consumer Attitudes Towards Nutritional Labels on Food Packaging in Europe August, 2005

Nutrition
Understanding
Education



The Nutrition-Conscious Global Shopper

- *Only partly understanding food labels, but selective nonetheless*
- *Deep seated cultural food values overrule latest diet fads among Europeans*

Half the world’s consumers understand the nutritional labels on food packaging only ‘in part’, although two in 10 ‘always’ check grocery labels, four in 10 do so when buying a product for the first time and nearly three in 10 check them when buying certain food types, according to a study released by ACNielsen, the world’s leading marketing research and information company.

The twice-yearly global ACNielsen Online Consumer Opinion Survey, the largest of its kind, polled over 21,100 respondents in 38 markets from Europe, Asia Pacific, North America and South Africa. The study asked consumers around the world how much they understood food labeling, when they would check nutritional information and labeling and what they check for as they do their grocery shopping.

What Consumers Check Food Packaging and Labels For

One in two Europeans regularly check food packaging and labeling for fat content, while two in five people here regularly check for calorie and sugar content.

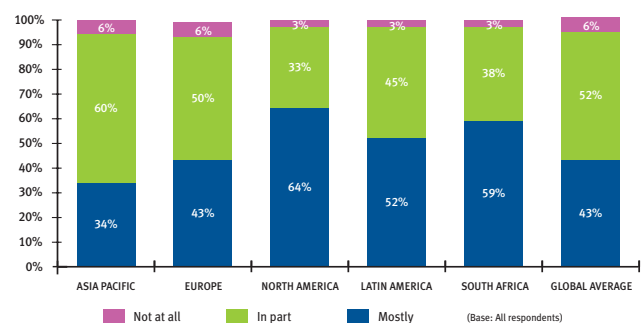
Globally, the ingredients most likely to be checked for by consumers were Fat (49%), Calories (43%), Sugar (42%), Preservatives (40%), Colouring and Additives (36%) each.

“While Europeans and Asians registered a high concern in checking for Preservatives and Additives, consumers in North America and Latin America topped the list for most regularly checking out Fat, Calorie and Sugar levels in packaged foods,” said Frank Martell, Chief Executive Officer, ACNielsen Europe.

However, when it comes to making sense of nutritional information on food packaging it’s a different story.

Consumer Understanding of Nutritional Contents

Not surprisingly, North American consumers are the most label savvy globally, with 64% of respondents saying the ‘mostly’ understand the nutritional information on food packaging, followed by 52% of Latin Americans, 43% of Europeans and finally, only 34% of Asia Pacific consumers.



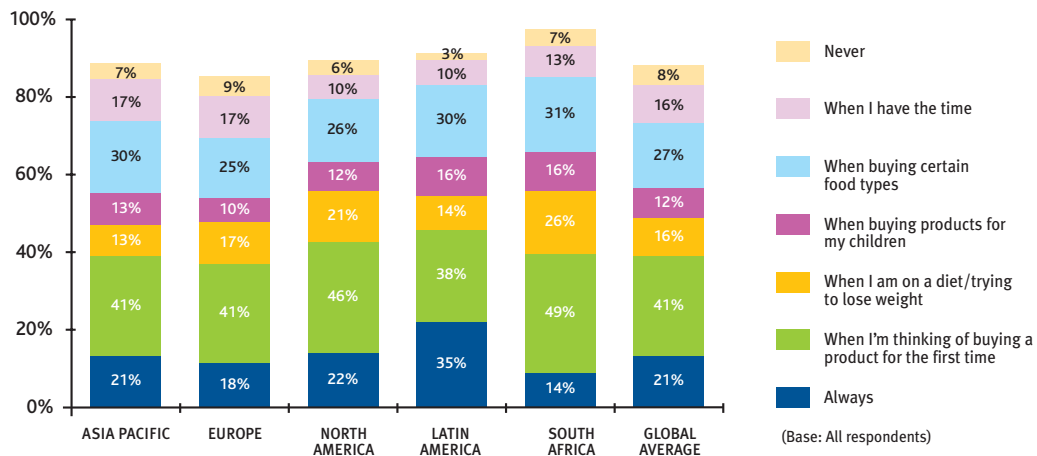
How well do you understand the nutritional information panels/labels on food packaging?



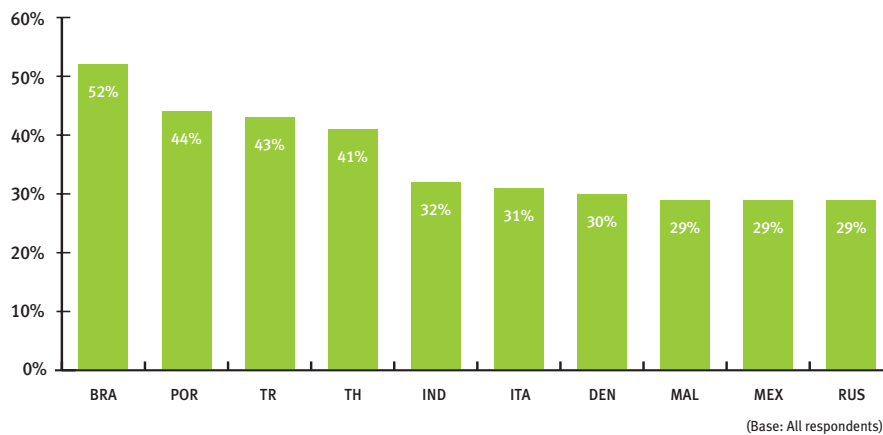
The survey clearly indicated that consumer’s deep rooted cultural and social relationship to food was the most important influencing factor in the way they viewed and interpreted nutrition value and food labeling.

Thirty-five percent of Latin Americans say they *always* check nutritional information compared to only 18% of Europeans. “For Latin

Americans, being highly aware of nutritional information and regularly checking food content and labeling has become part of their lifestyle. Meanwhile, among Europeans – and particularly Southern Europeans, the cultural and social emphasis is on eating 100% natural and wholesome foods, with priority on flavour – not calorie count,” said Martell.



When you are buying packaged food when would you check the nutritional information on the package?



When you are buying packaged food, when would you check the nutritional information on the package? Top 10 Always.

The Nutrition-Conscious Global Shopper – Consumer Attitudes

Towards Nutritional Labels on Food Packaging in Europe August, 2005

The survey also revealed that 56% of Italians said they regularly check for preservatives and colouring, yet only 30% checked for calories. “All Southern European countries shared similar high responses to checking for preservatives, additives and colourings, their cultural relationship with food simply saying that Artificial is bad, Natural is good.

In today’s competitive international food and beverage market, where an estimated 80% of new products fail in the first year of launch, food companies must know how to develop and ‘pitch’ their new products within the cultural and social context of a specific market if they are to succeed”, said Martell.

Regularly check labels for contents global and regional averages.

CONTENTS	ASIA PACIFIC	EUROPE	NORTH AMERICA	LATAM	SOUTH AFRICA	GLOBAL AVERAGE
Preservatives	47%	36%	28%	44%	44%	40%
Fat	45%	49%	57%	55%	49%	49%
Colouring	43%	34%	19%	42%	38%	36%
Additives	42%	33%	29%	34%	43%	36%
Calories	42%	42%	48%	59%	37%	43%
Sugar	39%	42%	47%	52%	43%	42%
Protein	30%	22%	31%	50%	35%	28%
Trans Fats	21%	21%	43%	33%	22%	24%
Carbohydrates	28%	24%	37%	44%	35%	28%
Fibre	28%	23%	28%	51%	33%	27%
Salt / Sodium	26%	22%	39%	38%	18%	26%
Gluten	12%	10%	9%	19%	12%	11%
Low GI	11%	9%	8%	22%	17%	11%

For Italy, a country which created and upholds the ‘slow food’ tradition, the whole ‘lite’ food trend which proved so popular in other markets, was a complete flop. “When food companies tried to introduce a range of ‘lite’ products here, they soon realized that Italians, like other Southern Europeans were not willing to sacrifice taste for less calories and were forced to rethink their whole marketing strategy. Today, new food and beverage products which instead promote ‘added’

benefits such as vitamins, or energy are more successful,” commented Martell.

Interestingly, the Southern European way of eating which favours a diet high in fish, vegetables, breads, cereals (pasta, beans, nuts, seeds) and low consumption of red meat and processed foods is today widely believed to be the healthiest way of eating – with proven results of decreased risks of cancer and increased life expectancy. The magic elixir



being olive oil, a dietary staple among all Southern European countries of Spain, Portugal, Italy and Greece.

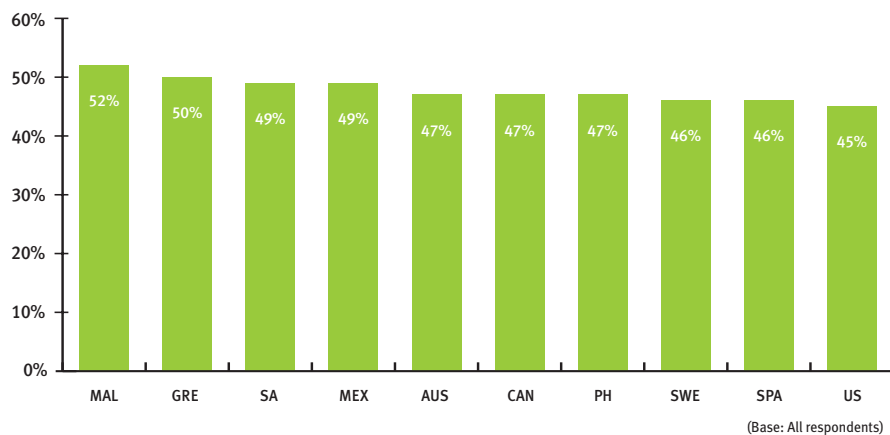
The healthy Med. Diet is quickly gaining acceptance throughout Europe and provided the basis for one of the popular diets in Scandinavia today. The Greek Doctor's Diet created by Dr. Fedon Lindberg in Norway advocates a diet based on the Mediterranean diet by consuming 'slow-carb' natural foods.

Other interesting cultural twists from the survey revealed that British consumers scored the highest response globally for checking

nutritional information only when they were on a diet and trying to lose weight (27%), while in Japan, where culturally consumers place a high level of trust in well known food manufacturers and due to strict legal restrictions governing the industry, up to 24% say they *never* check food labeling at all.

Consumer Understanding of Nutritional Contents

On average, four in 10 consumers worldwide said they were most likely to check the nutritional label when buying a product for the first time.



When you are buying packaged food, when would you check the nutritional information on the package? Top 10 "When I'm thinking of buying a product for the first time".

"It is critical for manufacturers to make their labeling as relevant and clear to their consumers as they can, given consumers are making purchase choices based on the information on the packaging. If they can't understand the label, they may not risk the purchase," warned Martell.

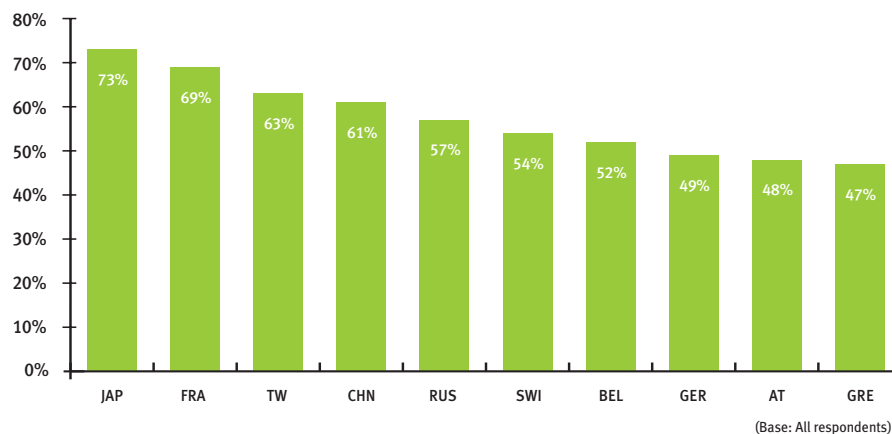
Not properly understanding food labeling prompted UK nutritionist Amanda Ursell to write a book on the topic - "What Are You Really Eating? How to Get Label Savvy?", (published by Hay House and available on amazon.com)

The Nutrition-Conscious Global Shopper – Consumer Attitudes Towards Nutritional Labels on Food Packaging in Europe August, 2005

“Even as a nutritionist, I often found nutrition labeling on foods and drinks confusing and would have to look twice before fully understanding it all. With more and more products appearing on our supermarket shelves and more nutrition details and health claims on packaging, the problem is going to get worse, not better. Consumers need to be able to understand what it all means and how it applies to them and their families. Only then can they hope to get really healthy choices into their supermarket trolleys,” said Ms Ursell.

And who in the world are the most educated and informed about nutrition and diet related issues?

When consumers were asked if they knew the distinct difference between Saturated and Unsaturated Fat, a global average of 56% claimed to, which was fairly consistent across all regions surveyed. Scandinavian nations of Norway (82%) and Sweden (76%) scored the highest responses while 77% of Japanese and 69% of the French said they did not know the difference between the two fats.

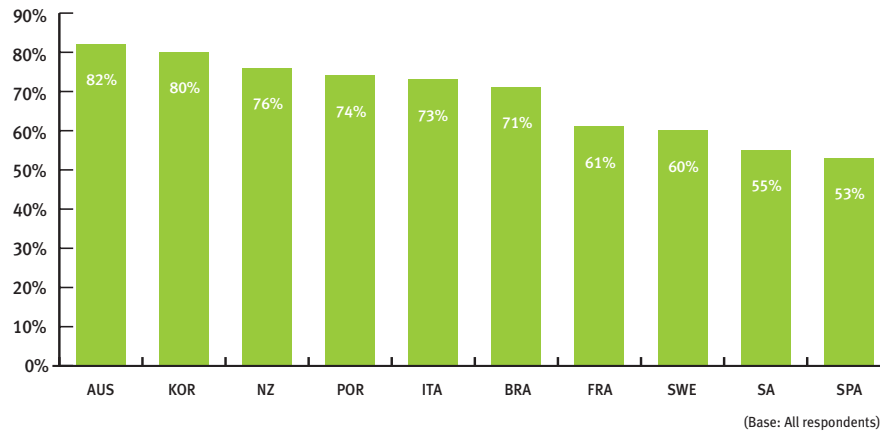


**Do you know the distinct difference between saturated fat and unsaturated fat?
Top 10 No.**

Atkins & Low GI: How ‘Popular Diets’ Fare

And after all the hype about the Atkins diet and the low-carb diet craze, consumers appear to be more interested in screening out other ingredients first, with a global average of just 28% claiming to check for the carbohydrate count on labels. Carbs were of most interest to the Latin Americans (44%) and North Americans (37%) and of lowest priority to the Asians (28%) and Europeans (24%).

And as for the latest diet craze in many Western countries, the Low GI diet, 59% of global consumers claimed not to have heard of it. Across the world, 82% of Australians know about this diet, followed by 80% of Koreans and 76% of New Zealanders, suggesting that this particular diet craze is generating publicity in some countries more than others.



**“Have you heard of the Glycemic Index?”
Top 10 Yes.**

“As our survey findings suggest, consumers are making their own choices based on little real understanding, and social and cultural relationships towards food are paramount. However, consumers globally are demanding more information on nutritional content from manufacturers and the food industry must simplify and garner greater trust among consumers in their product claims,” concluded Martell.

About the Survey

The ACNielsen Global Online Consumer Confidence Survey is conducted twice-yearly to provide an understanding of consumer attitudes towards their local economy now and in the future, their spending intentions and current major concerns. A total of 21,261 consumers were interviewed over the Internet in 38 markets between April 11 – May 10, 2005.

About ACNielsen

ACNielsen, a VNU business, is the world’s leading marketing information provider. Offering services in more than 100 countries, the unit provides measurement and analysis of marketplace dynamics and consumer attitudes and behavior. Clients rely on ACNielsen’s market research, proprietary products, analytical tools and professional service to understand competitive performance, to uncover new opportunities and to raise the profitability of their marketing and sales campaigns. To learn more, visit www.acnielsen.com



The 38 Markets in the 2005 Global Online Consumer Confidence Study

Asia Pacific:

Australia	China	Hong Kong
India	Indonesia	Japan
Korea	Malaysia	New Zealand
Philippines	Singapore	Taiwan
Thailand		

Europe:

Austria	Belgium	Denmark
Finland	France	Germany
Greece	Ireland	Italy
Netherlands	Norway	Poland
Portugal	Russia	Spain
Sweden	Switzerland	Turkey
UK		

Latin America:

Brazil	Chile	Mexico
--------	-------	--------

North America:

USA	Canada
-----	--------

South Africa

For further information, please visit: www.acnielsen.com