

## Understanding Consumer Views on Protein and Carbohydrates 2014 Study Outline

### Background:

This comprehensive, primary research study of over 1,000 U.S. consumers was designed to look at consumer awareness, interest, usage and attitudes regarding protein and carbohydrates. While Americans do not lack protein in their diets, interest in protein continues to grow. On the other hand, the term “carbohydrates” is sometimes looked at negatively despite the health halo possessed by fiber and whole grains. This study aims to explore these topics in-depth. It will also examine related topics such as the Paleo diet, gluten free and low carb diets as well as how protein and carbohydrate importance varies during different day parts and before and after exercise.

### Objectives:

1. Explore respondent understanding and opinions of protein and carbohydrates and why and when each are important.
2. Explore how respondents get protein and carbohydrates in their diets and to what degree of effort they will go to seek or avoid each.
3. Understand how companies can address these consumer needs through their brands and communications.

### Content:

1. The interaction of Carbohydrates and Protein.
  - a. What percentage of their diet do respondents think should be made up of carbohydrates, proteins, fats?
  - b. Is the focus on increasing protein or reducing carbohydrates?
  - c. To what degree can respondents identify foods that are protein and/or carbohydrate sources or both?
  - d. What type of energy needs do respondents face during the day?
  - e. Are proteins or carbohydrates more valuable to meet each type of energy need or is there no difference?
2. How Much Do Respondents Know About Protein?
  - a. What makes one protein source better than another in their eyes?
  - b. Do respondents know about complete and incomplete proteins?
  - c. Do respondents have a preference as to type of protein respondents get?
3. Status of Protein Intake.
  - a. Do respondents think they get enough protein?
  - b. What are their key sources of it?
  - c. Do respondents supplement or go out of their way to choose products with protein or just use a healthy diet? (If they supplement – When do they use supplements and what type do they use?)

- d. If respondents go out of their way for it, why? What do respondents think are the benefits of protein? (Energy, immunity, weight loss, skin, etc.)
  - e. List of food categories that are protein sources to be evaluated as healthy, unhealthy or neutral sources of protein.
  - f. When is protein important to respondents? (Certain times of the day, before or after workouts?)
4. Communication Preferences on Protein
    - a. What type of communications around protein resonate the most with them?
    - b. Does interest differ by type of claim? (High in, good source, etc.)
5. How much do Respondents Know about Carbohydrates?
    - a. What makes one source better than another in their eyes?
    - b. Why are carbohydrates important?
    - c. Do respondents differentiate carbohydrate sources? What makes one source better than another in their eyes?
    - d. Are respondents aware of the term “complex carbohydrates”? If so, which sources do respondents identify as complex carbs?
    - e. Do respondents have a preference as to source of carbohydrate respondents get?
    - f. Is there a whole grain/carbohydrate link or does one have a more positive connotation?
6. Status of Carbohydrate Intake
    - a. Do respondents think respondents get enough carbohydrates?
    - b. Conversely, are respondents trying to reduce carbohydrates? If so, does that mean all carbs or just certain carbs? Why are they cutting carbs?
    - c. Which carbohydrates do respondents cut if respondents are on a low carb diet or trying to cut carbohydrates?
    - d. Exploring low carb diets, gluten and Paleo diets.
    - e. What are their key sources of carbohydrates?
    - f. Do respondents supplement or go out of their way to choose products with carbohydrates or just use a healthy diet?
    - g. If respondents go out of their way for it, why? What do respondents think are the benefits of carbohydrates? (Energy, immunity, weight loss, skin, etc.)
    - h. List of food categories that are carb sources to be evaluated as healthy, unhealthy or neutral sources of carbohydrates.
    - i. When are carbs important to respondents? (Certain times of the day, before or after workouts?)
7. Communication Preferences on Carbohydrate
    - a. What type of communications around carbohydrates resonate the most with them?
    - b. Does interest differ by type of claim? (High in fiber, good source of fiber, etc.)
8. Protein and Carbohydrates and Exercise
    - a. Do respondents exercise regularly?
    - b. What kinds of exercises are they doing? How often do they do specific types of exercise – Cardio, strength training, flexibility?

- c. Does dietary change occur because of their exercise? Do they adjust their diet before or after specific types of exercise?
- d. Does this change involve protein or carbohydrates?
- e. What types of workouts are associated with a change in intake of protein or carbohydrates?

**Methodology:**

- Fielded August 2014
- 1,009 consumers in the U.S. ages 18-70