

Health And Nutrition Strategist™ Diabetes Fact Sheet

Diabetes is a serious lifelong illness. It is a disorder of the human body's metabolism. People with diabetes either produce little or no insulin, or the body does not respond appropriately to the insulin that is produced. A healthy diet, physical activity, and insulin (and/or an oral medication) are the basic strategies for managing either Type 1 or Type 2 diabetes. A person's health and nutrition lifestyle is one of the largest factors in determining the onset of Type 2 diabetes. Ethnicity and age are also significant factors.

According to the National Diabetes Information Clearinghouse, as of 2005 an estimated 20.6 million people aged 20 years or older had diabetes (or 9.6% of the adult population). Decision Analyst's Health And Nutrition Strategist™ confirms this percentage, including Type 1 and Type 2 diabetes.

Along with aging baby boomers and Americans' growing waist lines, Type 2 diabetes is becoming more prevalent, making diabetics a large and important market for food, beverage, restaurants, and pharmaceutical companies. The diabetics market is even more important than it might seem, because any household with a diabetic member (including children with diabetes) tends to modify food and beverage purchases for the whole family. So perhaps as many as 20 to 25 million households are directly or indirectly influenced by diabetes.

Demographics Of Diabetics

The data from Health And Nutrition Strategist™ reinforces the evidence that diabetes is most often associated with age and obesity.

- Diabetics tend to be older.
 - 82.2% of diabetics are aged 45 or older, compared to 46.6% of nondiabetics.
- Diabetics are more likely to earn less.
 - 62.0% of diabetics have an annual pretax income per year of less than \$50,000, compared to 52.8% of nondiabetic adults.
 - 7.1% of diabetics earn more than \$100,000, compared to 16.0% of nondiabetic adults.
- Diabetics are more likely to be overweight.
 - 10.3% of diabetics weigh more than 300 pounds and 16.4% weigh between 250 and 299 pounds, compared to 2.7% and 6.5% of the nondiabetic adults, respectively.
 - The average weight of a diabetic is 210 pounds, while the average for nondiabetic adults is 175 pounds.
- And diabetics know they are overweight.
 - 49.8% of diabetics say they are "more than 30 pounds overweight," compared to 24.3% of the nondiabetic adults.
 - Only 11.3% of diabetics describe their weight as being "about right," compared to 24.9% of the nondiabetic adults.



Diet And Lifestyle

Since diabetes is more prevalent among those aged 45 or older, the following tables present more detailed information for this age group.

What Actions Are Diabetics Taking To Improve Their Health? Diabetics are taking more actions to improve their health than nondiabetics, such as taking an eye exam, making changes to their diet, and getting a flu shot. However, diabetics are not paying attention to every aspect of their health; they are less likely to get a dental exam or checkup than nondiabetics.

**Percent Who Took Action To Improve Their Health
Aged 45 Or Over**

| Healthcare Activities | Nondiabetics Aged 45+ | Diabetics Aged 45+ |
|-------------------------------------|--------------------------|-----------------------|
| Had a dental exam or checkup | 42.0% | 33.6% |
| Lost weight | 29.2% | 37.5% |
| Had an eye exam | 33.1% | 48.3% |
| Had a flu shot | 31.0% | 44.5% |
| Made significant changes to my diet | 19.1% | 28.6% |

Question: Which of the following actions have you taken in the past 6 months?

How Frequently Do Diabetics Exercise? Diabetics are less likely to exercise than nondiabetics. When diabetics do exercise, they exercise fewer hours per week than nondiabetics.

**Percent Who Exercise Weekly
Aged 45 Or Over**

| Hours Of Weekly Exercise | Nondiabetics Aged 45+ | Diabetics Aged 45+ |
|---------------------------|--------------------------|-----------------------|
| Less than 1 hour per week | 16.3% | 19.8% |
| 1 to 3 hours per week | 29.0% | 28.1% |
| 4 or more hours per week | 31.3% | 21.8% |
| Don't exercise regularly | 23.4% | 30.3% |

Question: About how often do you exercise during an average week? By exercise we mean any type of physical activity (i.e., walking, running, cycling, tennis, weight lifting, etc.) regularly and intentionally performed to develop and maintain your physical fitness.

Are Diabetics Dieting? Even though the table on the next page shows that diabetics are more likely to eat some fattening foods such as sausage, hot dogs, and carbonated soft drinks, they are also more likely to have been on a diet, and more likely to have been on a low-sugar/diabetic, low-calorie, and low-carbohydrate diet.

**Percent On A Diet In The Past 12 Months
Aged 45 Or Over**

| Diet | Nondiabetics Aged 45+ | Diabetics Aged 45+ |
|---|--------------------------|-----------------------|
| Low sugar/diabetic | 7.0% | 52.3% |
| Low calorie | 16.2% | 22.1% |
| Low carbohydrate | 12.9% | 33.2% |
| I have not been in a diet on the past 12 months/have never been on a diet | 59.6% | 33.0% |

Question: Which of the following types of diets, if any, have you been on in the past 12 months?

What Do Diabetics Eat? When it comes to food, both nondiabetics and diabetics eat “bad” foods, but the bad foods differ. Diabetics are more likely to consume hot dogs, sausages and carbonated soft drinks, while nondiabetics are more likely to consume tortilla chips, cakes/brownies, and chocolate. For diabetics, eating more meats is consistent with the “low-carbohydrate” and “low-sugar/diabetic” diets.

**Percent Who Consumed The Following Food Items In The Past 30 Days
Aged 45 Or Over**

| Food Item | Nondiabetics Aged 45+ | Diabetics Aged 45+ |
|--------------------------------------|-----------------------|--------------------|
| Meat | | |
| Beef cuts, such as steaks, roasts | 61.4% | 66.2% |
| Hot dogs | 45.6% | 56.8% |
| Sausage | 44.6% | 53.9% |
| Snacks | | |
| Cookies | 60.3% | 59.2% |
| Chocolate candy/Chocolate candy bars | 57.2% | 48.3% |
| Cakes/Brownies | 34.8% | 29.1% |
| Tortilla chips | 35.1% | 26.5% |
| Drinks | | |
| Bottled water | 60.4% | 55.7% |
| Carbonated soft drinks | 65.1% | 75.2% |
| Wine | 32.8% | 20.5% |

Question: Which of the following (food) items, if any, have you eaten (consumed) in the past 30 days, including both at home and away from home?

Where Do Diabetics Eat? Diabetics are more likely to visit IHOP, Golden Corral, McDonald’s, and KFC.

**Percent Who Visited Restaurant In Past 12 Months
Aged 45 or Over**

| Restaurant | Nondiabetics Aged 45+ | Diabetics Aged 45+ |
|--|-----------------------|--------------------|
| Casual Dining Restaurants | | |
| Applebee’s | 33.7% | 32.6% |
| IHOP (International House of Pancakes) | 19.8% | 25.1% |
| Golden Corral | 12.1% | 18.4% |
| Fast-Food/Quick-Serve Restaurants | | |
| McDonald’s | 54.3% | 61.9% |
| KFC (Kentucky Fried Chicken) | 36.6% | 43.2% |
| Long John Silver’s | 13.9% | 20.2% |

Question: From which of the following restaurants have you purchased food or beverages in the past 12 months, including dine-in, take-out or delivery? (Include breakfast, lunch, dinner and snacks)

Do Diabetics Use Nutritional Labels? Diabetics are more influenced by nutritional labels when choosing which product or brand to buy than nondiabetics. Both diabetics and nondiabetics are more likely to use nutritional labels to decide what products to buy, compared to what brands to buy.

Percent Who Use Nutritional Labels to Choose Products And Brands Aged 45 Or Over

| Frequency | Products To Buy | | Brands To Buy | |
|-----------------|-----------------------|--------------------|-----------------------|--------------------|
| | Nondiabetics Aged 45+ | Diabetics Aged 45+ | Nondiabetics Aged 45+ | Diabetics Aged 45+ |
| Always or often | 51.9% | 59.3% | 45.5% | 50.8% |
| Sometimes | 27.8% | 26.1% | 27.6% | 27.0% |
| Rarely or never | 20.3% | 14.6% | 26.9% | 22.2% |

Question: When shopping for foods and beverages, how often do you use the nutritional information found on the label or package to decide which (products/brands) to buy?

Conclusion

Diabetics constitute a very large market, with the health and nutritional choices of as many as 20 to 25 million households influenced by one or more members suffering from diabetes. All trends in the U.S. point toward even greater levels of diabetics in the future population, as more and more individuals pursue sedentary lifestyles and overeat. This means that companies that take major steps now to understand this market will be positioned to exploit growth in the diabetic population.

This paper presents only the “tip of the iceberg.” Hundreds and hundreds of additional facts about diabetics are included in the Health and Nutrition Strategist™.

Background And Methodology

This Diabetes Fact Sheet is from Decision Analyst's Health And Nutrition Strategist™. The data were collected using the American Consumer Opinion® online panel on a continuous basis starting in January 2006 to March 2008, using a nationally representative statistically balanced sample of 9,265 adults (aged 18+), of which 4,636 were aged 45 or over. The margin of statistical error ranges from 2.5% to 3.5%, plus or minus, at a 95% confidence level.

About Decision Analyst

Decision Analyst is a global marketing research and analytical consulting firm. The company specializes in advertising testing, strategy research, new products research, and advanced modeling for marketing-decision optimization.



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