

2017 FOOD & HEALTH SURVEY

INTERNATIONAL
FOOD INFORMATION
COUNCIL FOUNDATION

TABLE OF CONTENTS

Background & Methodology	3
Demographics	4
A “Healthy” Perspective	7
Food Confusion	23
Unpacking “Processed”	44
Thinking Beyond the Box	54

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Background

The International Food Information Council (IFIC) Foundation's *2017 Food & Health Survey*, "A Healthy Perspective: Understanding American Food Values," marks the 12th edition of an ongoing investigation into the beliefs and behaviors of Americans.

This year, the survey investigates important issues regarding consumer confusion, the food information landscape, health and diet, food components, food production, sustainability, and food safety.

Methodology

- Online survey of 1,002 Americans ages 18 to 80. March 10 to March 29, 2017. Approx 22 minutes to complete.
- Significant trend changes from the 2016 results are noted with up and down arrows.
- The results were weighted to ensure that they are reflective of the American population ages 18 to 80, as seen in the 2016 Current Population Survey. Specifically, they were weighted by age, education, gender, race/ethnicity, and region.
- The survey was conducted by Greenwald & Associates, using ResearchNow's consumer panel.

General Demographics

Gender

Male	48%
Female	52



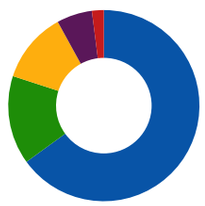
Age

18 - 34	31%
35 - 49	25
50 - 64	26
65 - 80	18



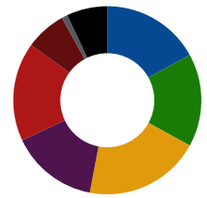
Race/Ethnicity

White	65%
Hispanic	15
African American	12
Asian or Pacific Islander	6
Other	2



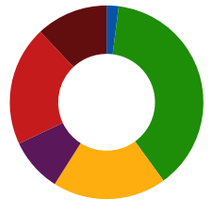
Household Income

Less than $35,000	17%
$35,000 to $49,999	16
$50,000 to $74,999	20
$75,000 to $99,999	15
$100,000 to $149,999	17
$150,000 and above	7
Don't know	1
Prefer not to answer	7



Education

Less than high school	2%
Graduated high school	38
Some college	19
AA degree/technical/vocational	9
Bachelor's degree	20
Graduate/professional degree	12



Household Demographics

U.S. region

Northeast	18%
South	37
West	24
Midwest	21



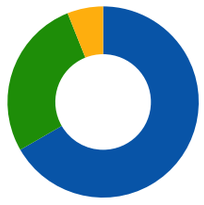
Type of location

Suburban	50%
Urban	21
Rural	16
Small town	13



Type of residence

I own the property where I live	66%
I rent the property where I live	27
I have another arrangement	6



Marital status

Married	59%
Living with partner	7
Single, never married	21
Divorced or separated	9
Widowed	3
Other	*



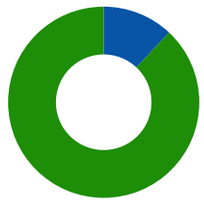
Children's ages

Multiple responses accepted

Newborn - 2 years old	8%
3 - 6 years old	7%
7 - 12 years old	11%
13 - 17 years old	11%
18 or older	38%
Do not have any children	39%
Prefer not to say	1%

Health Demographics

Pregnancy	*Among 18-45 females:*
Pregnant in past 12 months	**12%**
Not pregnant	**88**



BMI score	
Normal or Low	**36%**
Overweight	**31**
Obese	**30**
No answer	**3**



Diseases	*Multiple responses accepted*
High blood pressure	**24%**
High cholesterol	**20%**
Diabetes	**11%**
Stress/anxiety/depression	**10%**
Overweight/obesity	**10%**
Heart disease	**4%**
Cancer	**2%**
Osteoporosis	**2%**
ADHD	**2%**
Stroke	**1%**
None of the above	**55%**



A "HEALTHY" PERSPECTIVE

"Healthy" is often at the heart of our discussions about food. Still, how we think about "healthy" in the context of what we eat remains hotly debated.

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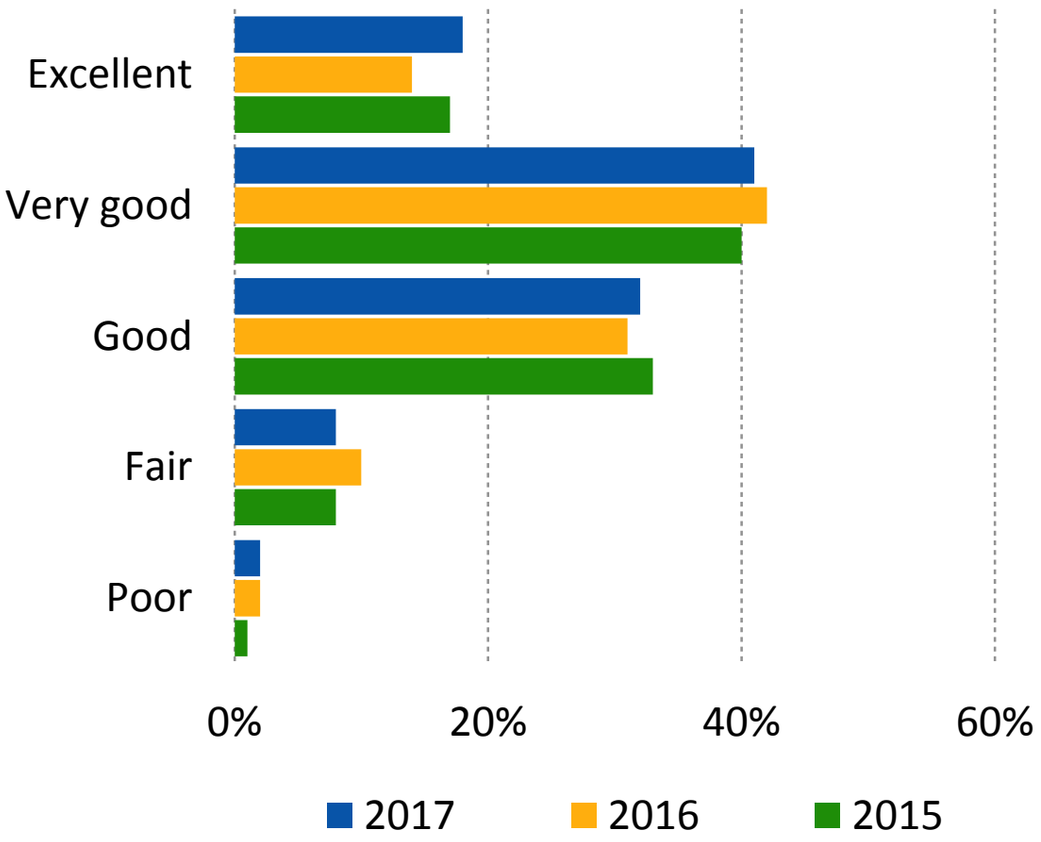
Majority see health as very good or better

While consumers may overestimate their health status, the measure has not changed from 2016

59%

Describe their own health as "very good" or "excellent"

Self-Reported Health Status



Health Status and BMI

(% of total)*

Health:	BMI: Normal/ low	Overweight	Obese
Exc/VG	25%	20%	12%
Good	9%	9%	13%
Fair/poor	2%	3%	4%

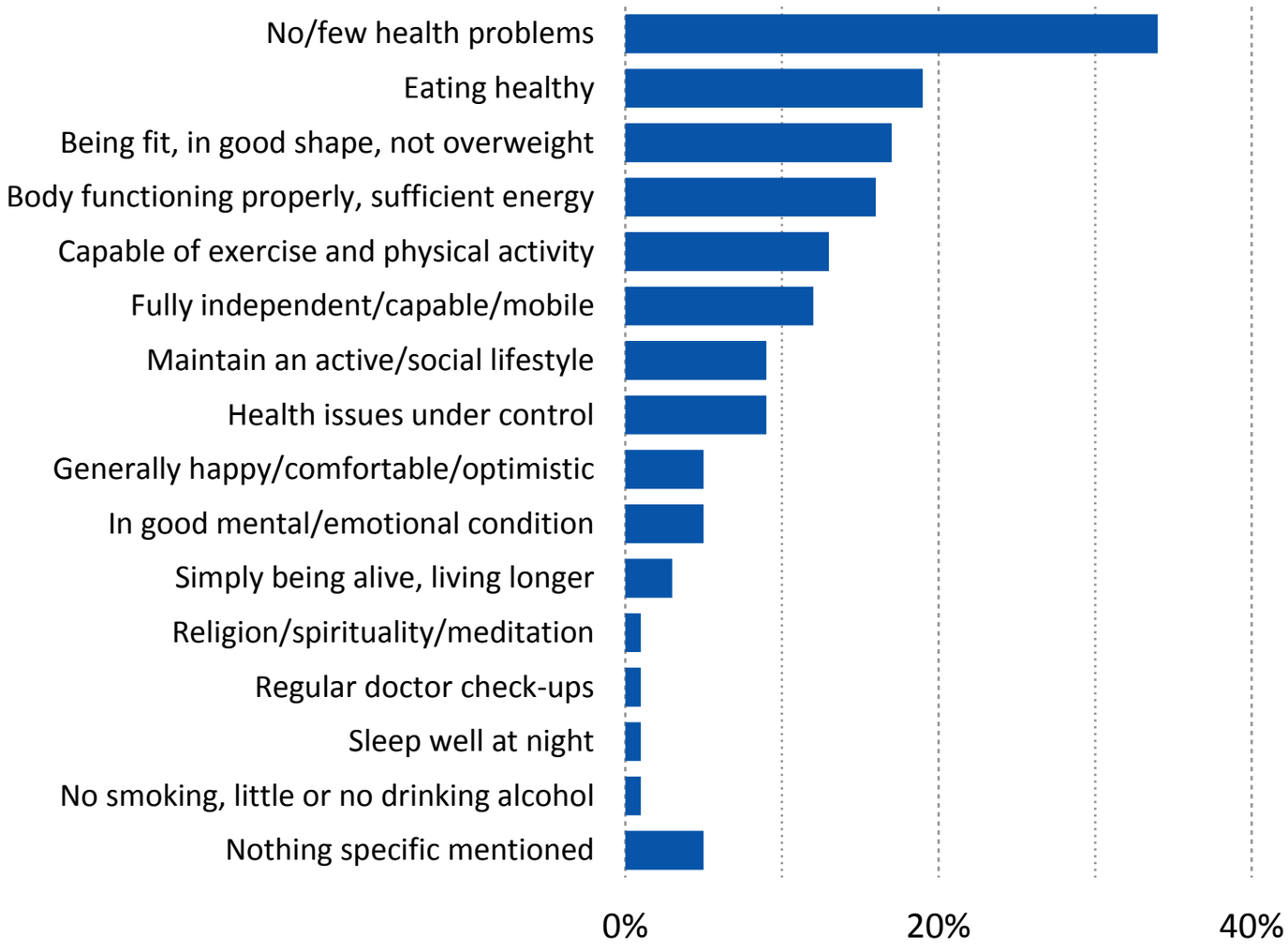
Q: How would you describe your own health, in general? (n=1,002)

**3% refused to answer*

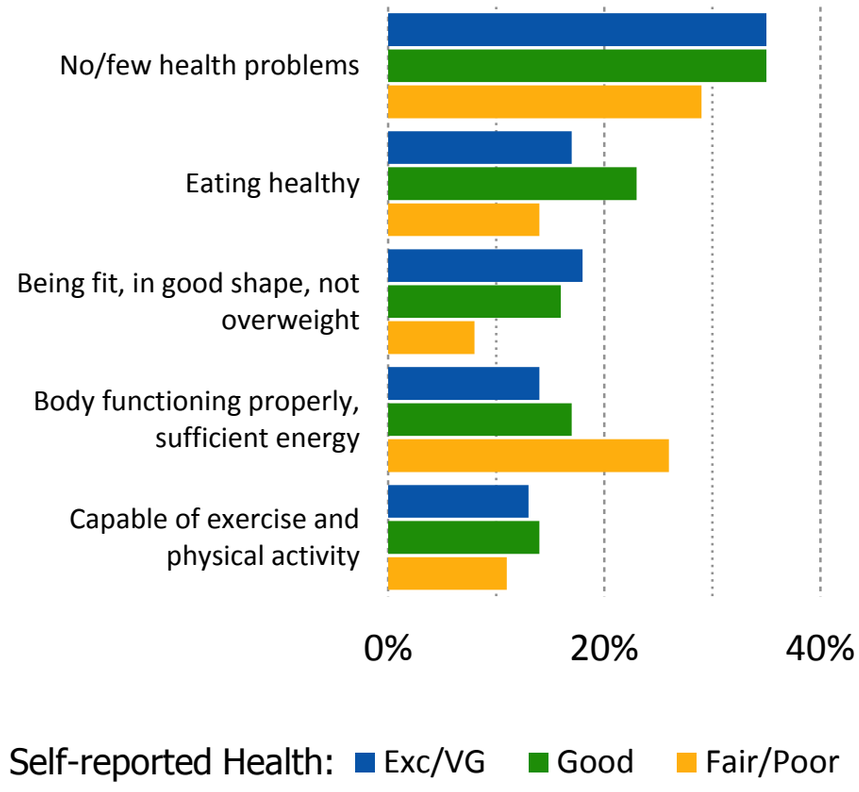
‘Healthy’ largely defined as lack of problems

Having no/few health problems tops the list, but 1 in 5 define as eating healthy

How Consumers Define ‘Healthy’



Definition by Health Status

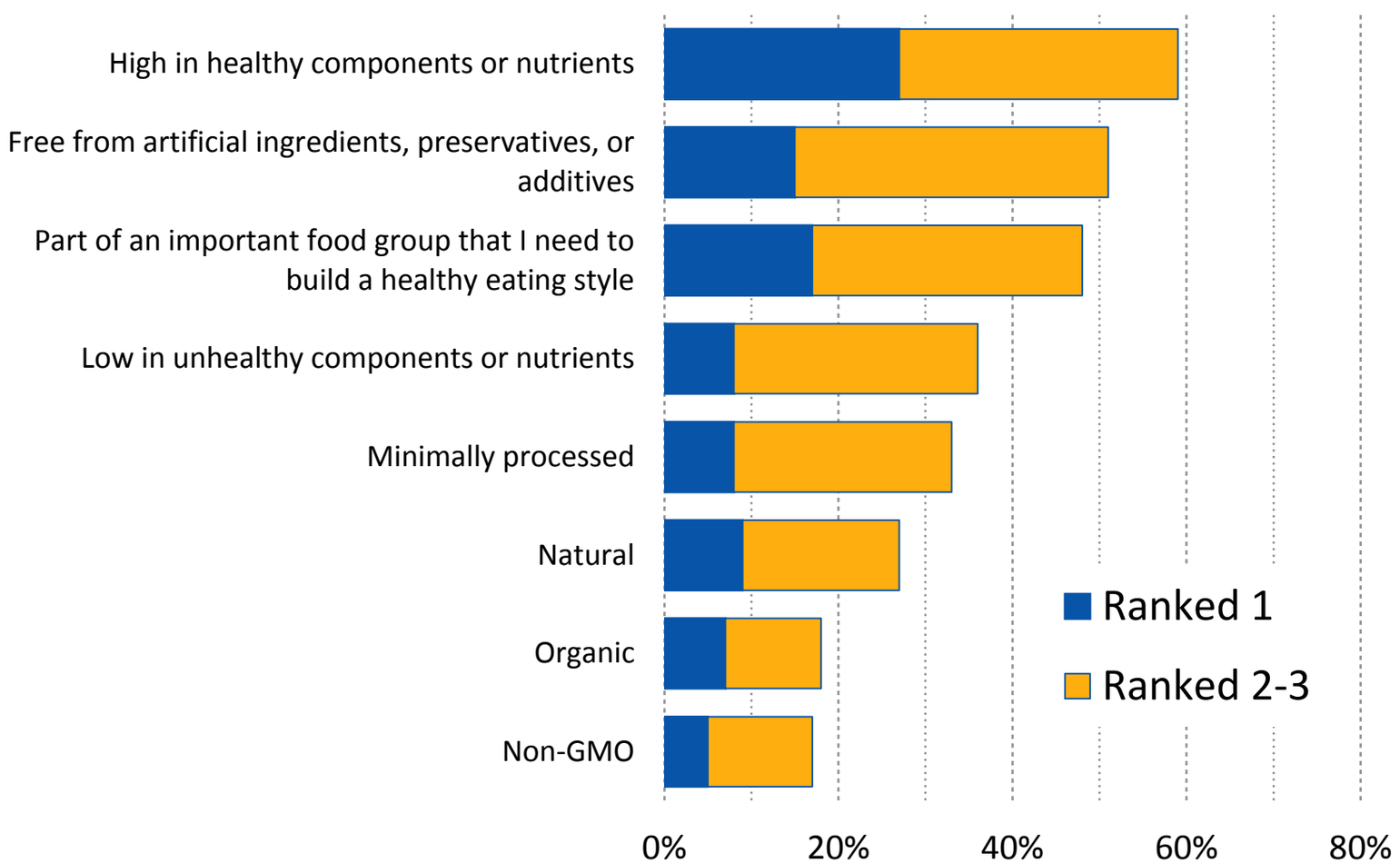


Q: What does being “healthy” mean to you? (n=1,002)

Presence of healthy components important

Adults 50 + are more concerned about the positives than the negatives

How Consumers Define a Healthy Food



46%
Of college educated say "low in unhealthy components"

Men are more likely to say "low in unhealthy components"; women are more likely to say "minimally processed"

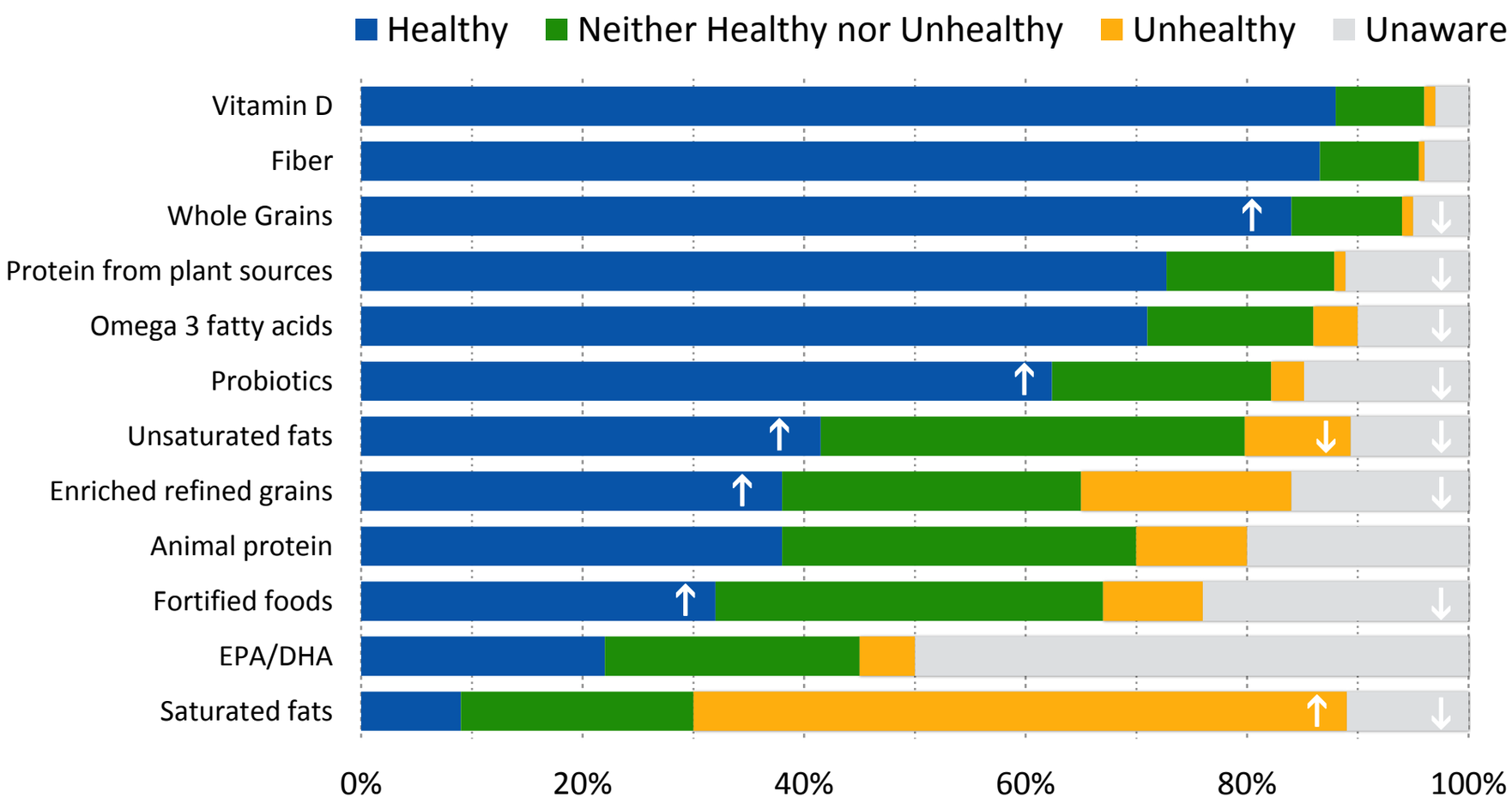
2x
Consumers in rural areas are twice as likely to choose Non-GMO

Q: How do you define a healthy food? (n=1,002)

Vitamin D, fiber, and whole grains top the list

Several components significantly increased over the last year

Healthfulness of Specific Components



Q: How would you rate the healthfulness of each of the following? (n=1,002)

50%

Of consumers age 65+ say unsaturated fats are healthy, vs. just **33%** of those age 18-34

Older consumers are also more likely to say that saturated fats are unhealthy

47%

Of consumers age 18-34 say animal protein is healthy, vs. just **26%** of those age 65+

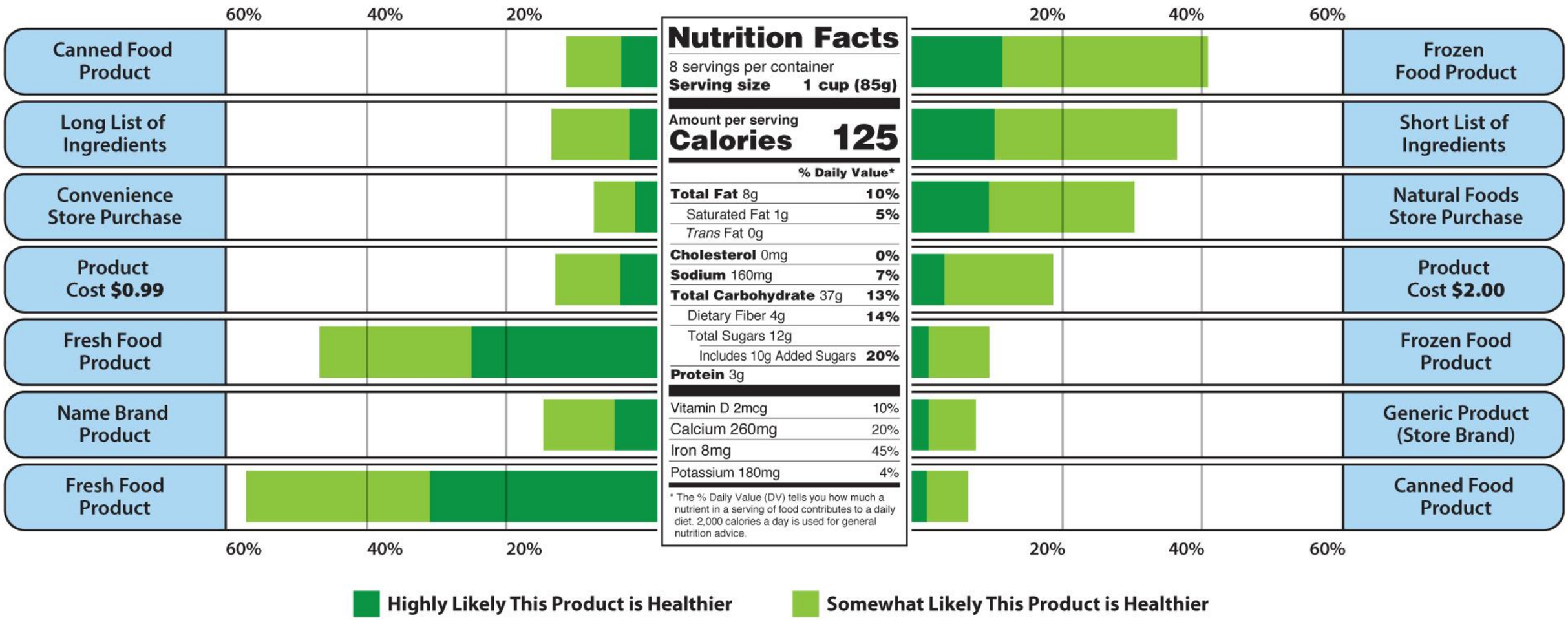
Younger consumers are also more likely to say that EPA/DHA is healthy

Women are more likely to say that Vitamin D, Fiber, and Probiotics are healthy

Factors beyond nutrition create a health halo

Form, place of purchase and length of ingredient list, among other factors, affect the perceived healthfulness of nutritionally identical products

If Two Products Have the Same Nutrition Facts Panel… Which is Healthier?

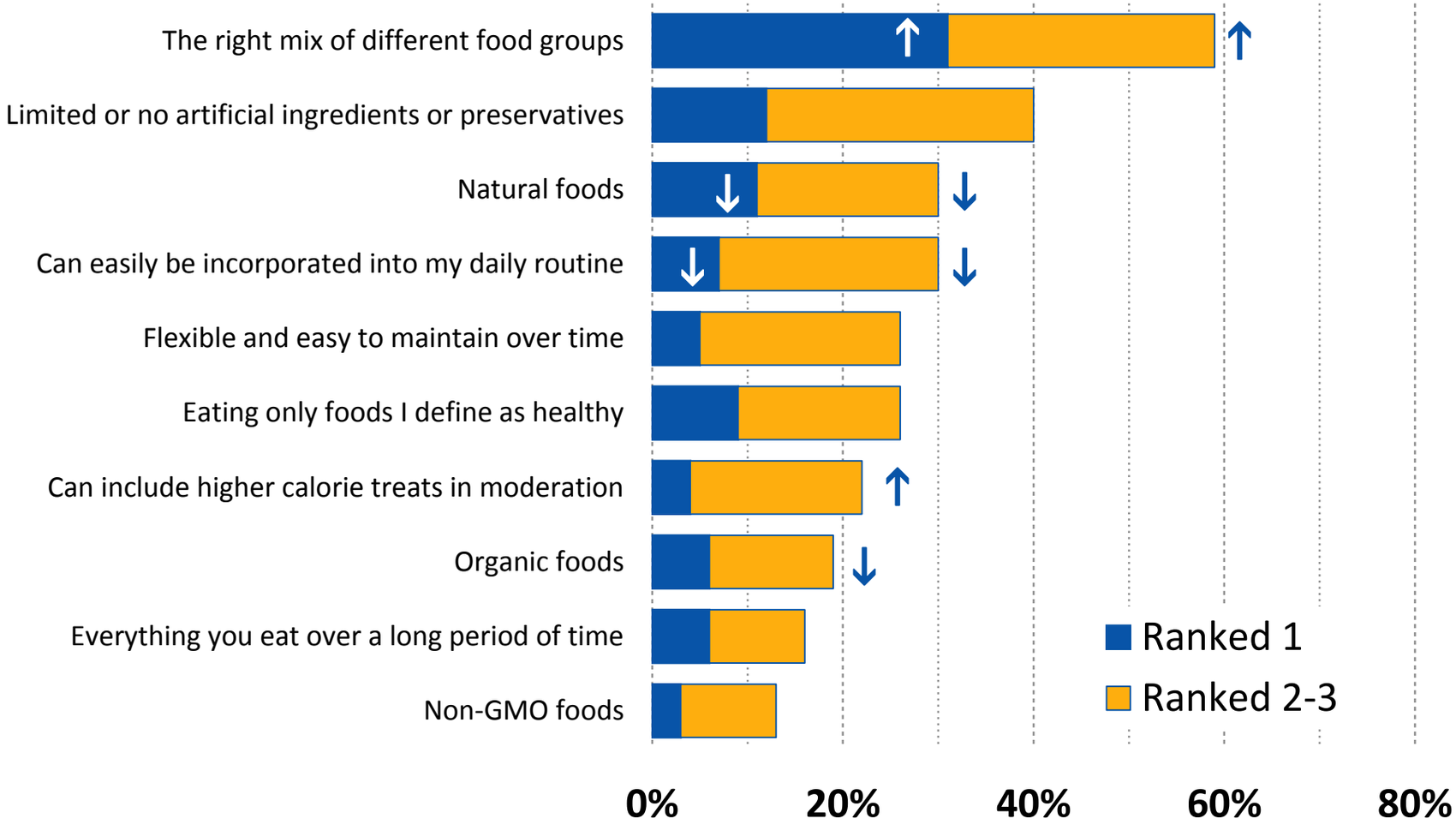


Q: Imagine you came across two food products that had the exact same Nutrition Facts panel. Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,002)

Healthy eating style largely defined as the right mix

Nearly 6 in 10, an uptick in 2017, say getting the right mix of different foods is important

How Consumers Define a Healthy Eating Style



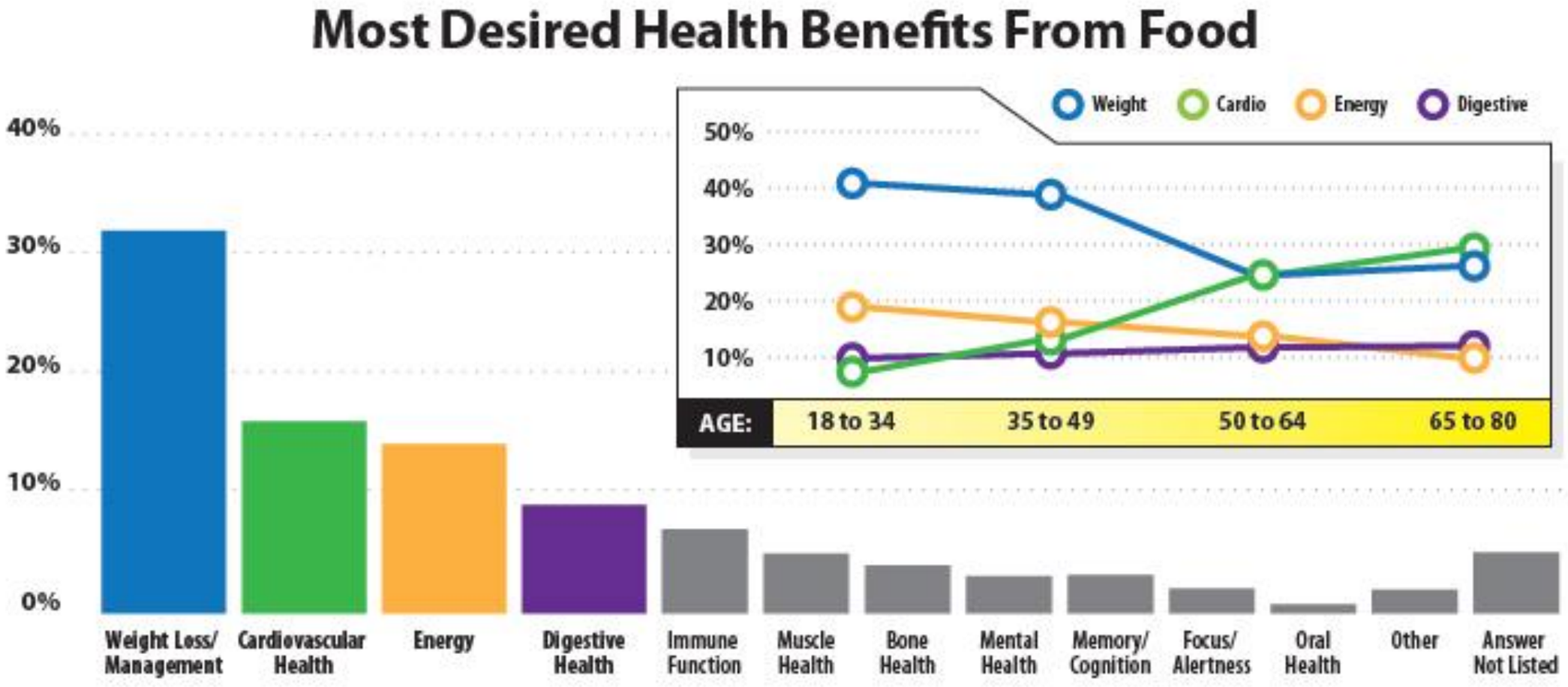
72%

Of consumers age 65+ describe a healthy eating style as the right mix of food groups. Older consumers are also more likely to think it should be part of a daily routine.

Q: How do you define a healthy eating style? (n=1,002)

Weight loss is most desired benefit

1 in 3 interested in benefit of weight loss, especially younger consumers



Q: Which of the following health benefits are you most interested in getting from foods or nutrients? (n=1,002)



A "HEALTHY PERSPECTIVE":

HEALTHY EATING

Overall, Americans say they take steps to eat healthy and understand the importance of expert nutrition guidance. Many Americans also report use and familiarity with nutrition education tools, like USDA's MyPlate.

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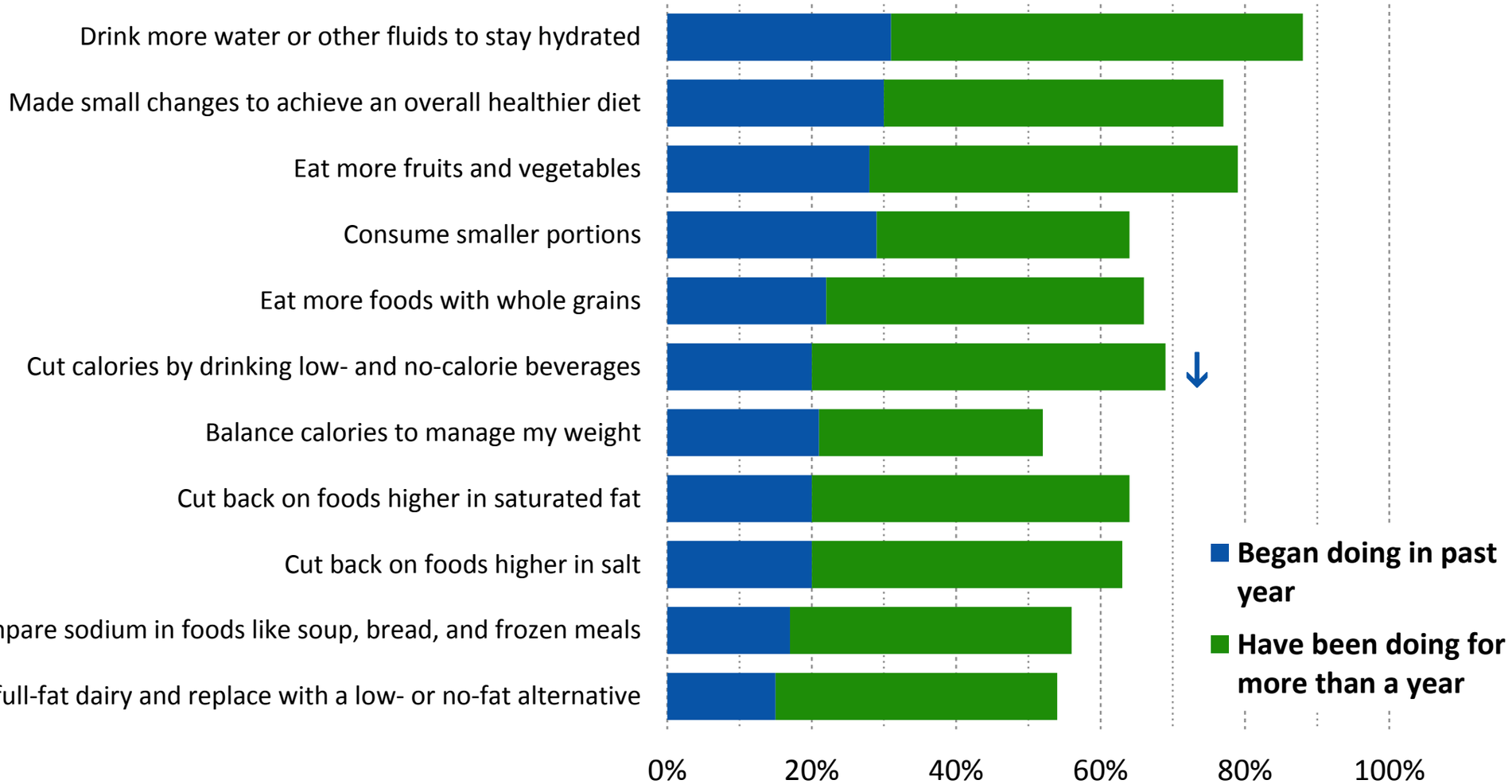
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Americans take many steps to be healthy

Common actions include drinking more water, making small changes, eating fruits/veggies

Women are more likely to make an effort to drink water to stay hydrated, and to consume smaller portions

Steps Taken In Past Year



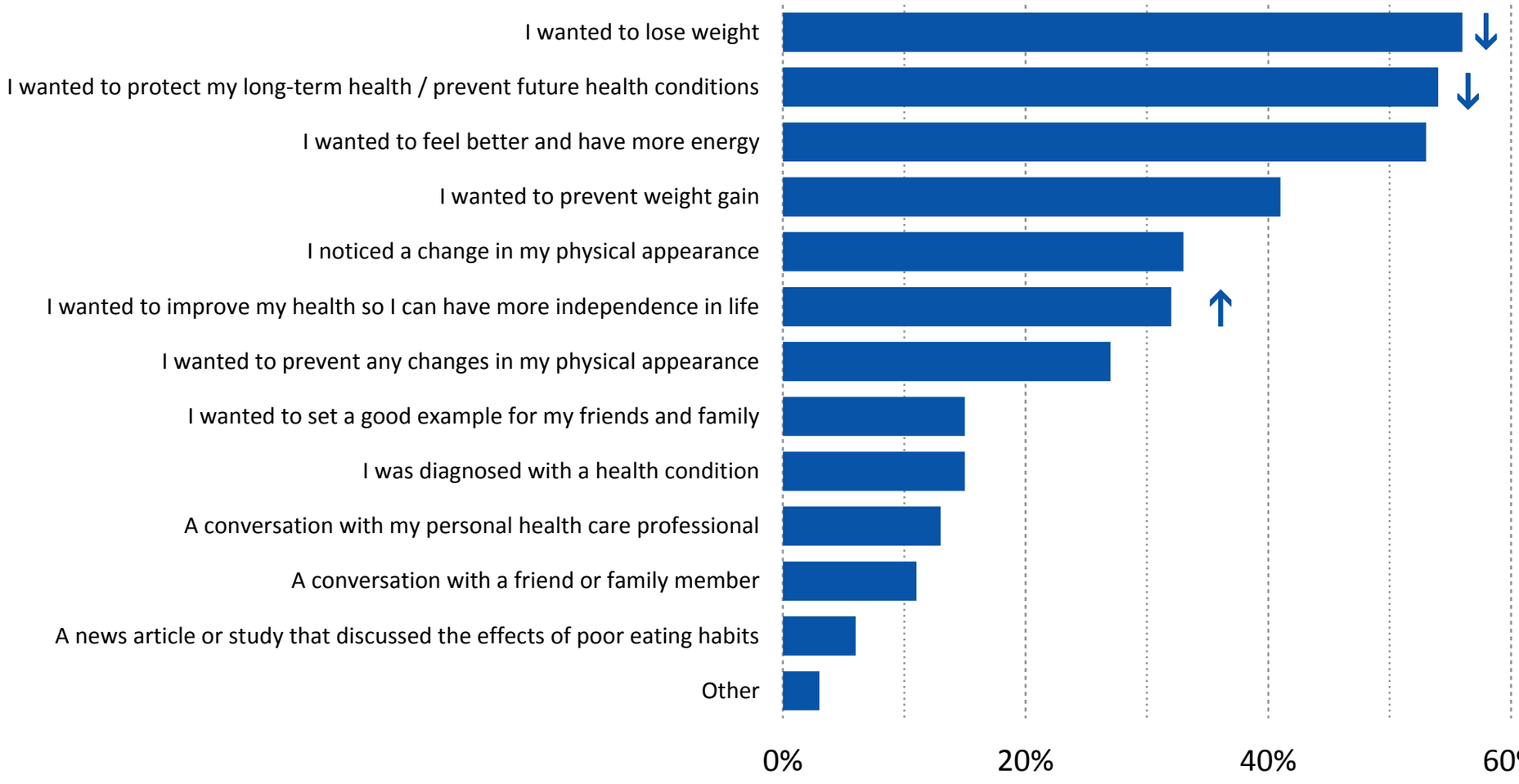
Q: Over the past year, which of the following, if any, have you made an effort to do? (n=1,002)

Internal motivators drive healthy habits

Weight loss, energy, and long-term health are primary motivators for healthier eating

Reasons Consumers Take Steps

(Of those taking any action)



73%

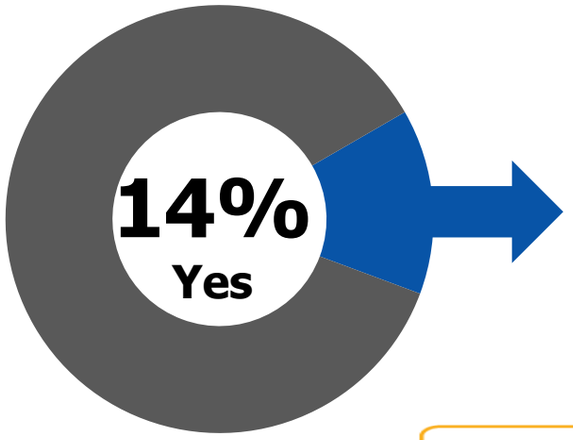
Of those who are obese say they took these steps to lose weight. They are also more likely to take steps because they noticed a change in their physical appearance, wanted more independence, were diagnosed with a health condition, and had a conversation with a healthcare professional.

Q: Which of the following motivated you to make an effort to change your eating habits? Select all that apply. (Of those who made changes in the past year, n=635)

One in seven follow a specific eating pattern or diet

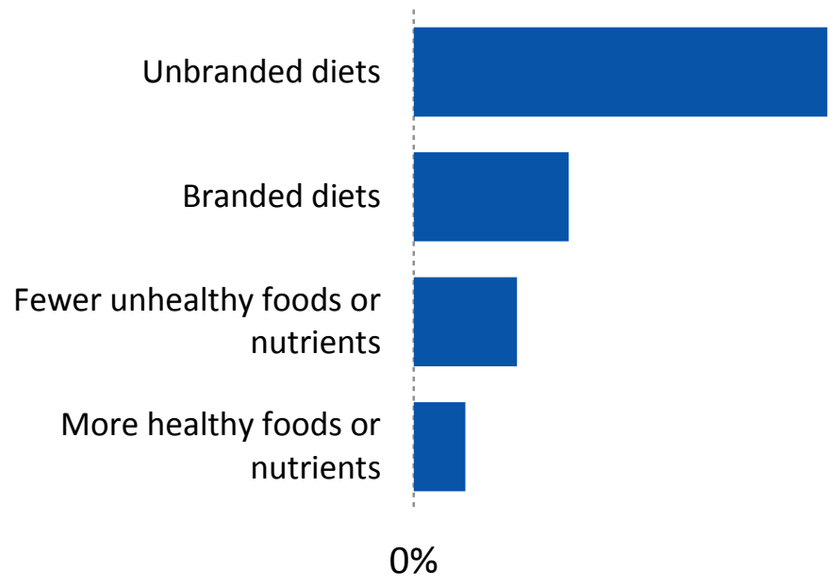
Unbranded diets like paleo, vegan and vegetarian most common

Followed a Specific Eating Pattern or Diet in Past Year



Those with lower BMI are more likely to have followed an eating pattern or diet

Eating Pattern/Diet Followed



Examples:

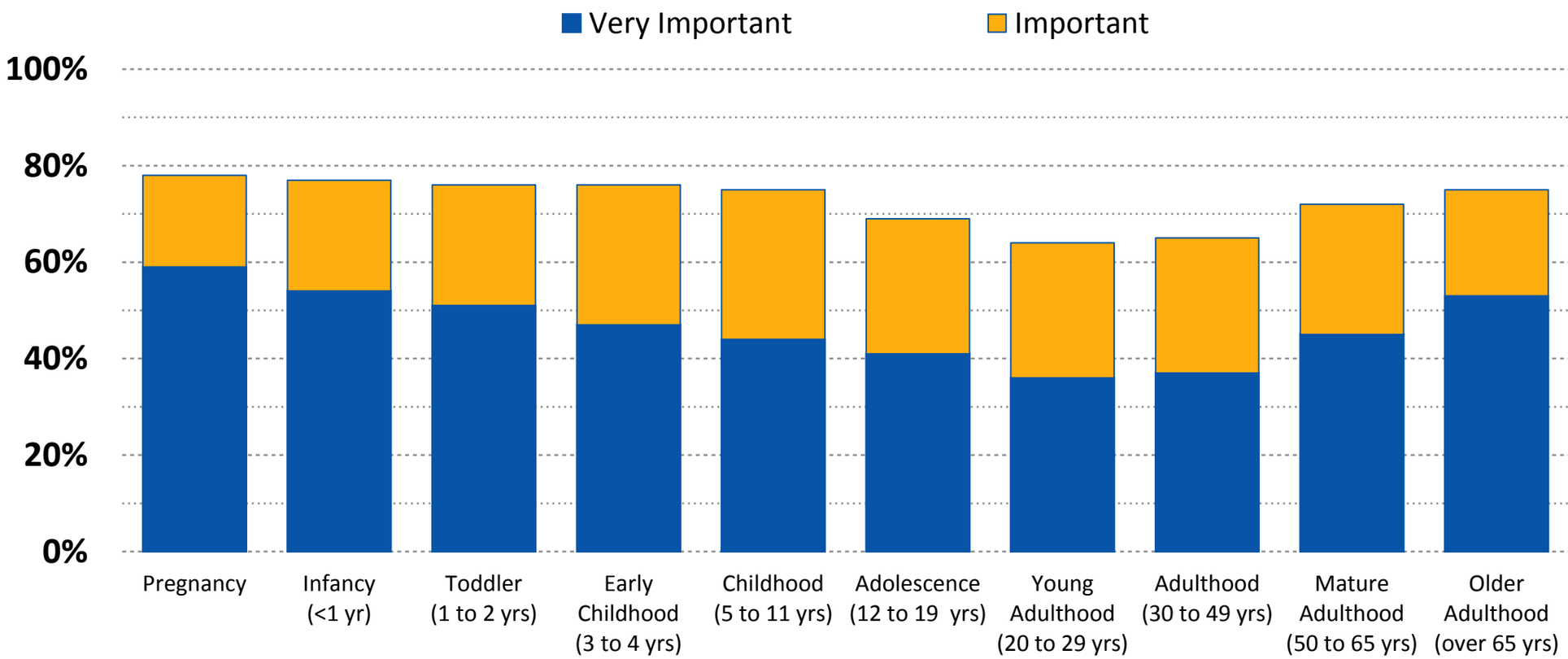
- Paleo, Vegan, Vegetarian
- Weight Watchers, Atkins, Whole 30
- Low carb, sugar, fat, sodium
- More vegetables, fruit, protein

Q: Have you followed any specific eating pattern or diet at any time in the past year? (n=1,002)

Importance of expert guidance varies across life stages

Many agree that parents and older adults should follow advice, but believe it is less critical for adolescents and younger adults

Importance of Following Expert Nutrition Guidance at Specific Life Stages



Women are more likely to say it is important for all life stages

Those who say there is conflicting information about what to eat are **more** likely to think expert guidance is important for children

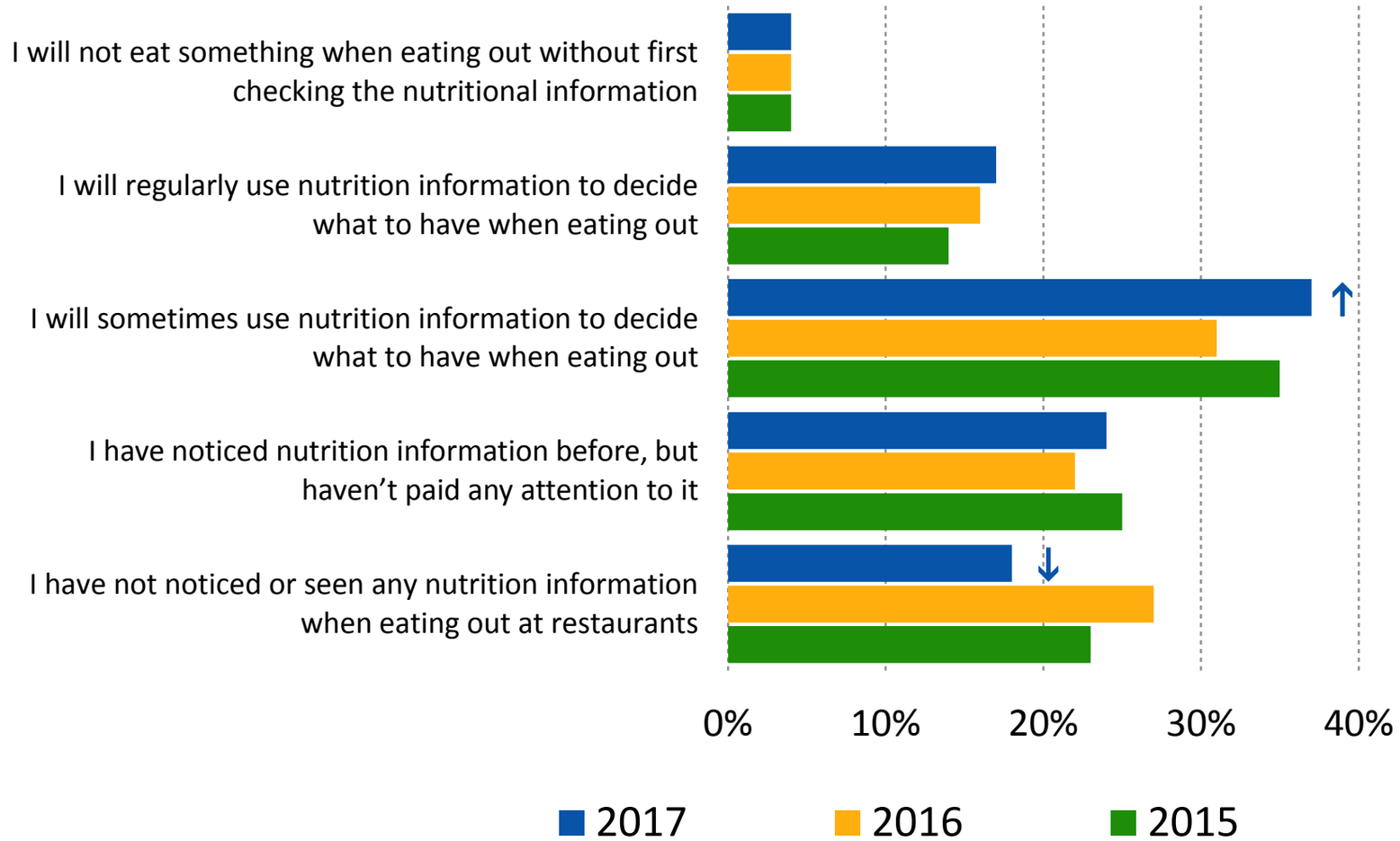
Consumers age 65+ are more likely than those age 18-34 to think expert guidance is important for adolescents and young adults

Q: How important is it to follow guidance from experts on nutrition during the following stages of life? (n=1,002)

Majority use nutrition info when eating out

College educated and women are more likely to use nutrition info

Use of Nutrition Info When Eating Away From Home



73%

Of college educated consumers use nutrition info when eating out, vs. **51%** of those with less than a college degree

62% of women use nutrition info when eating out, vs. **53%** of men

58%

Use nutrition info at least sometimes when eating away from home

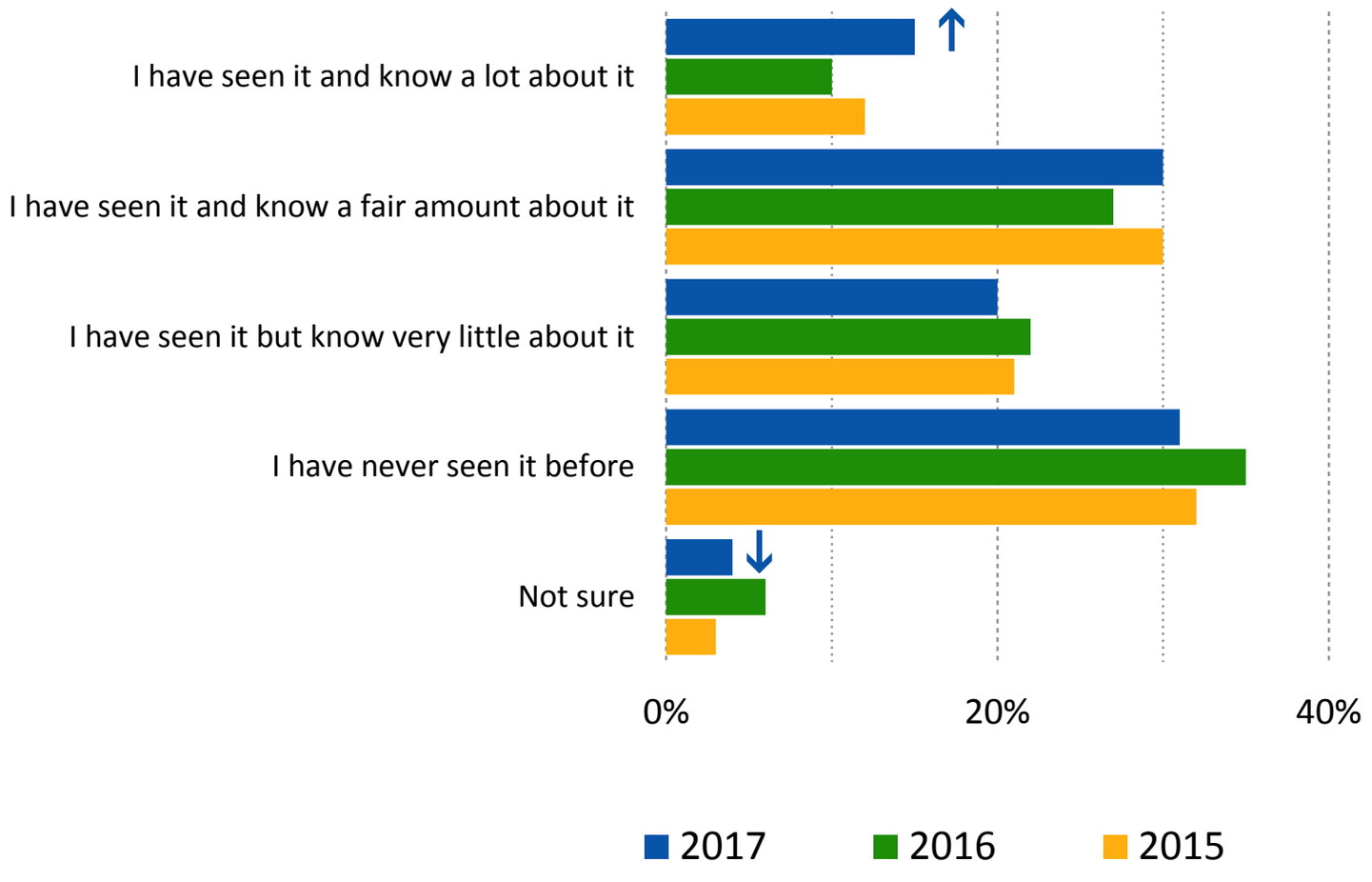
Q: How, if at all, have you used nutrition information when eating away from home? (n=1,002)

Most consumers have seen MyPlate

Nearly half know a lot or a fair amount about the MyPlate graphic

Familiarity with the MyPlate Graphic





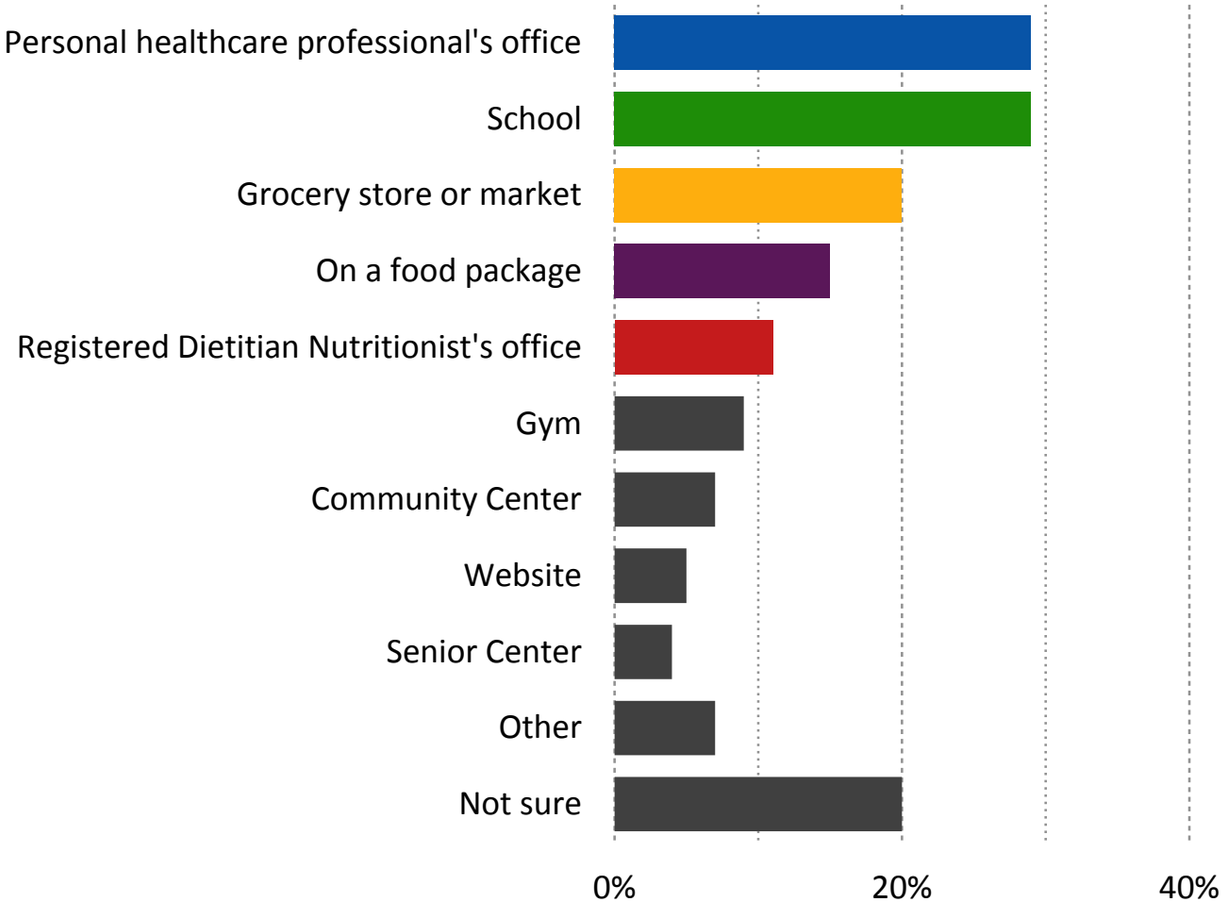
Q: How familiar are you, if at all, with the following graphic? (n=1,002)

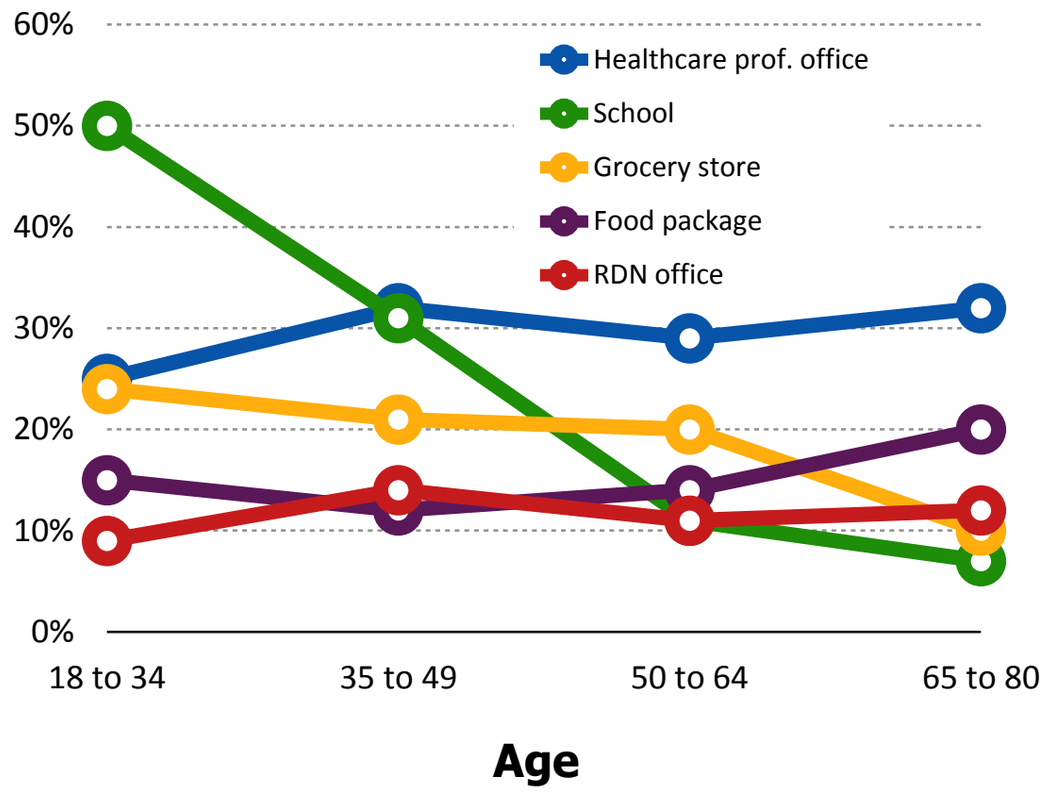
Consumers most commonly see MyPlate at doctor's office and schools

Nearly 3 in 10 have seen MyPlate in these locations, although this is naturally dependent on age

Where Consumers Have Seen the MyPlate Graphic

(Of those familiar with graphic)





Q: Where have you seen the following graphic? (Of those familiar with MyPlate graphic, n=683)



FOOD CONFUSION

Americans turn to friends and family to help us guide our food choices but see others, like dietitians and healthcare professionals, as the most trusted sources. The disconnect between trust and reliance of sources may lead to the glut of conflicting nutrition information.

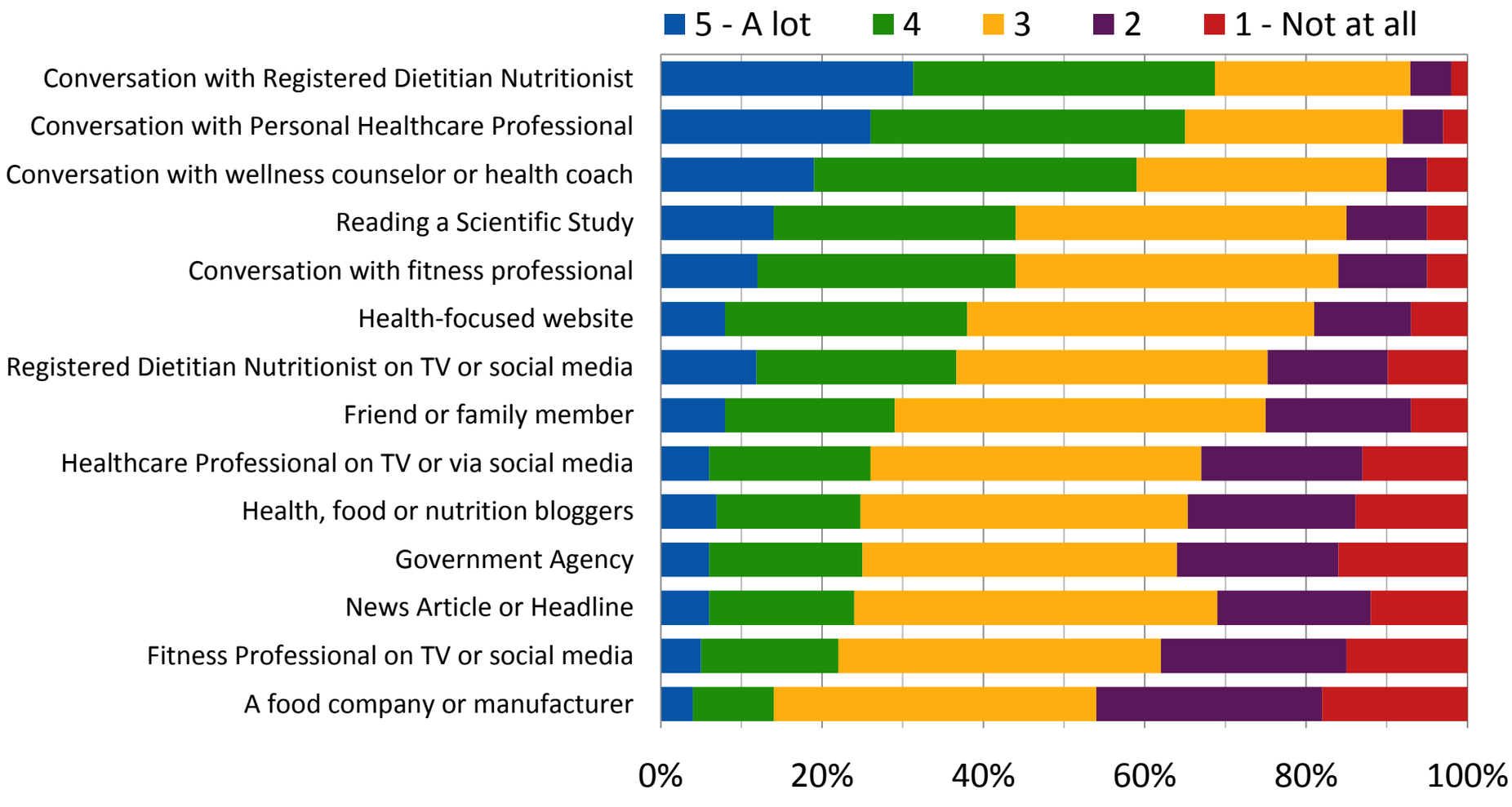
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High trust in dietitians and health professionals

Two-thirds have high trust in advice from a conversation with a Registered Dietitian Nutritionist

Trusted Sources About Which Foods to Eat/Avoid



Women have greater trust in RDNs and in fitness professionals. Men have more trust in friends and family.

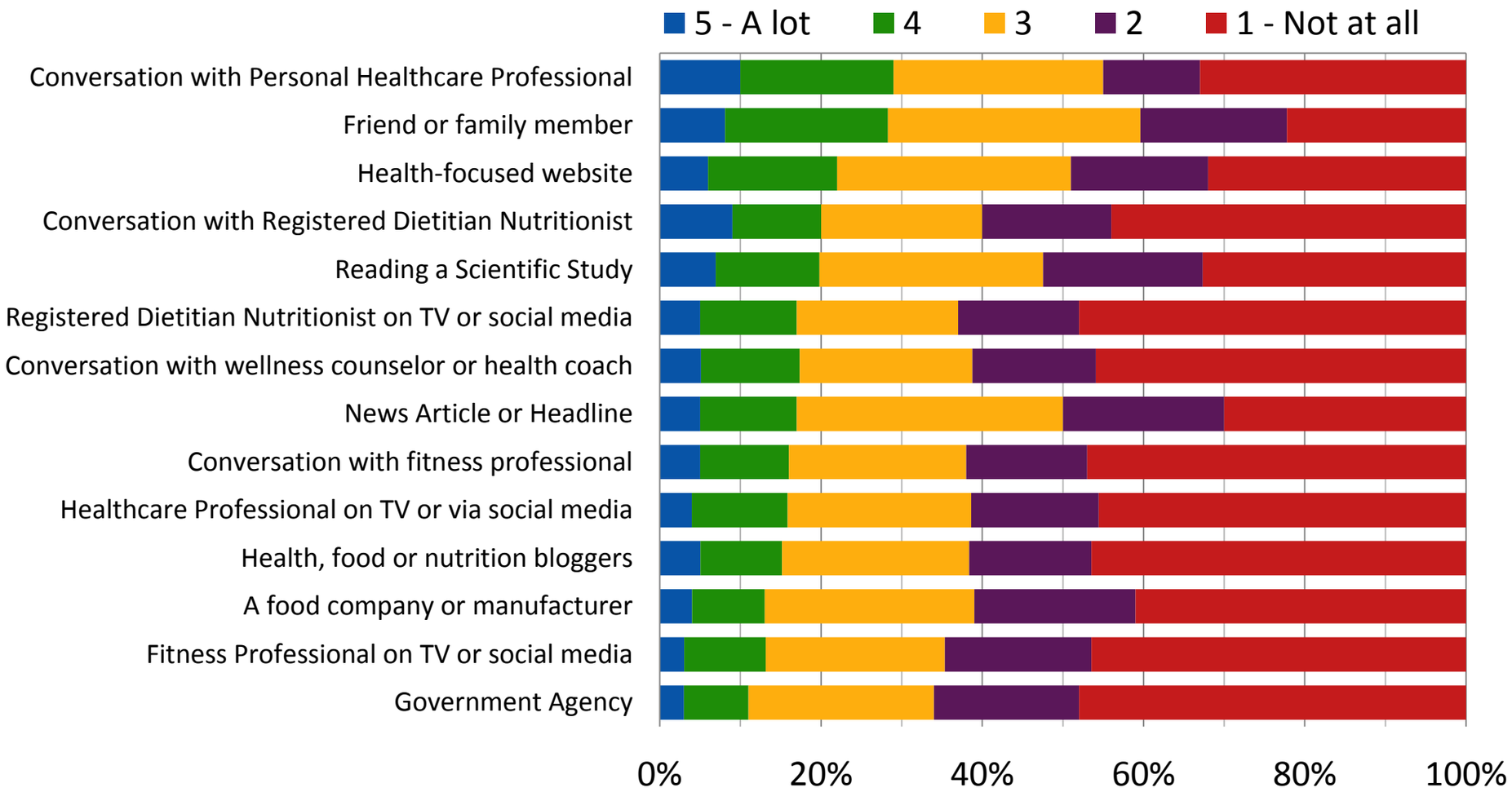
Millennials have more trust in scientific studies, health websites, bloggers, the news, healthcare and fitness professionals on TV/social media, and food companies.

Q: How much would you trust information from the following on which foods to eat and avoid? (n=1,002)

Healthcare professionals are top source

Friends and family are also heavily relied upon, even more than dietitians

Sources for Information About Which Foods to Eat/Avoid



Men are more likely to get information from friends/family, wellness counselors, healthcare professionals on TV/social media, and food companies.

38%

Of Millennials say friends and family are a top source of information, vs. **21%** of Boomers.

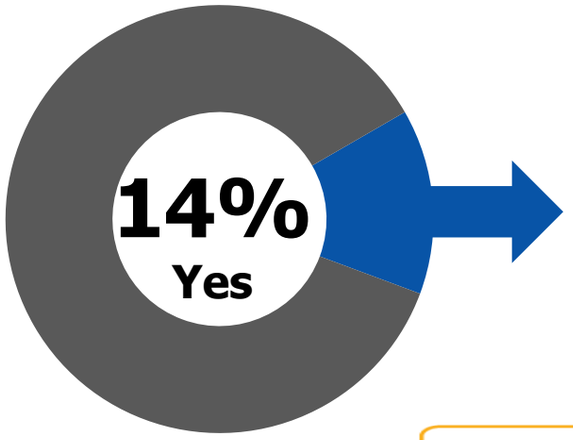
Millennials are also more likely to get info from many other sources.

Q: How often do you get information from the following on which foods to eat and avoid? (n=1,002)

One in seven follow specific eating pattern or diets

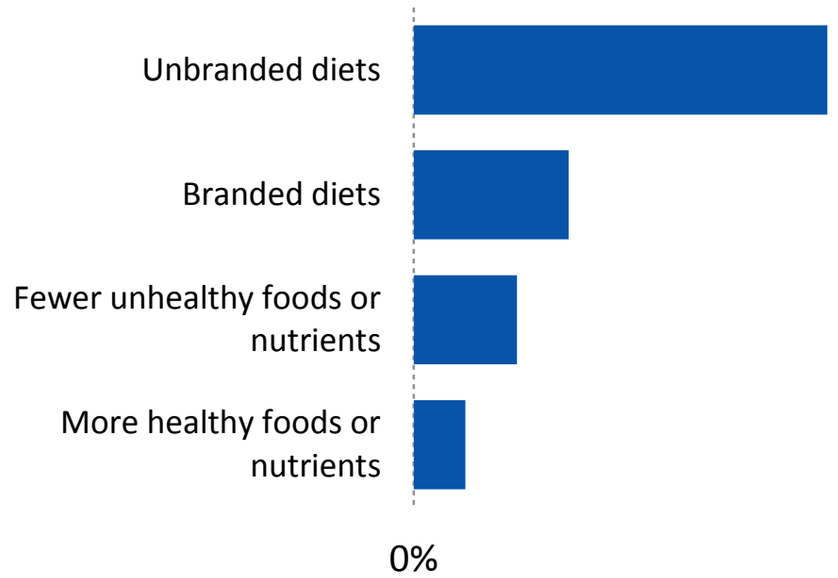
Unbranded diets like paleo, vegan and vegetarian most common

Followed a Specific Eating Pattern or Diet in Past Year



Those with lower BMI are more likely to have followed an eating pattern or diet

Eating Pattern/Diet Followed



Examples:

- Paleo, Vegan, Vegetarian
- Weight Watchers, Atkins, Whole 30
- Low carb, sugar, fat, sodium
- More vegetables, fruit, protein

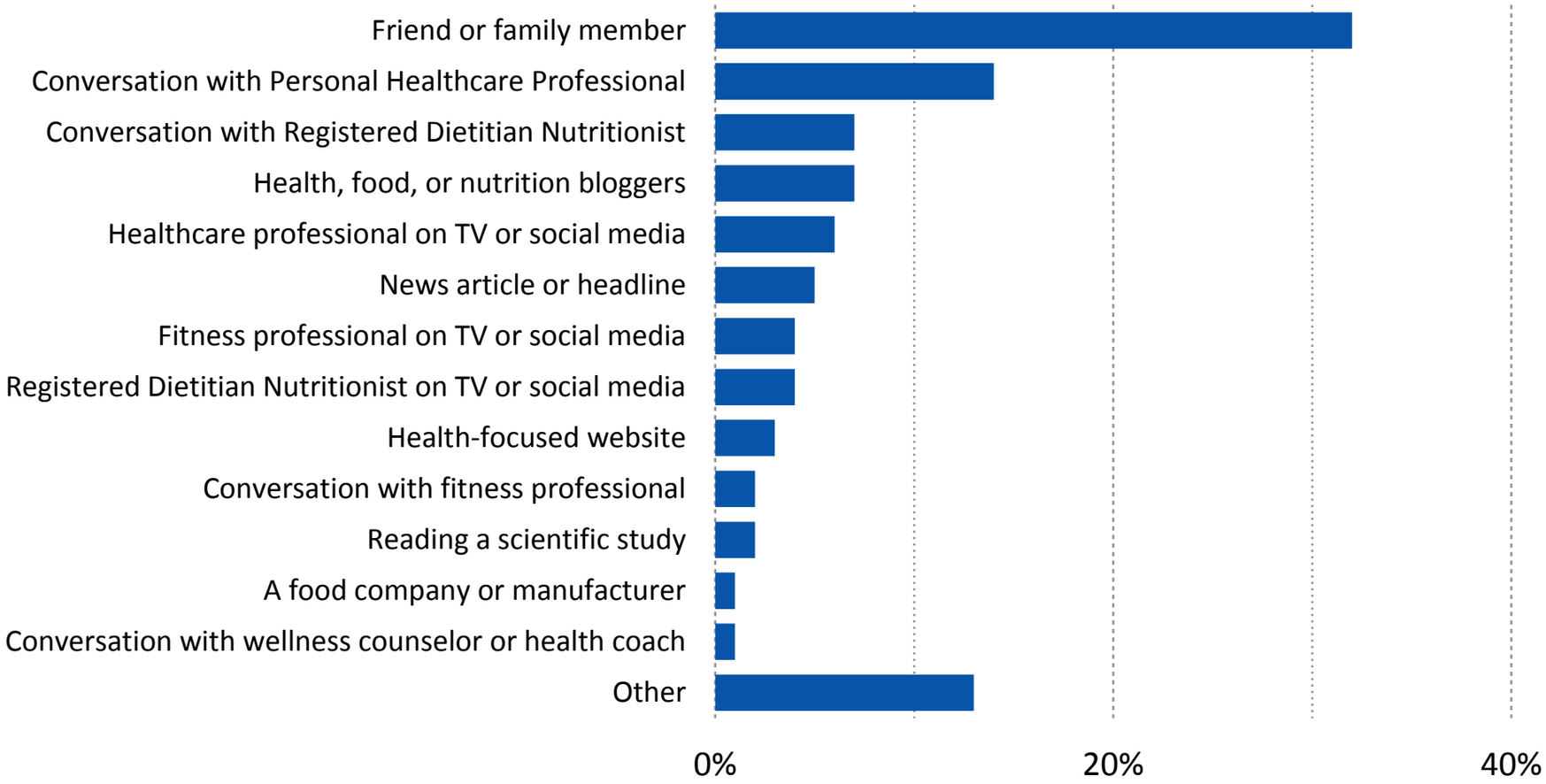
Q: Have you followed any specific eating pattern or diet at any time in the past year? (n=1,002)

Friends and family influence diet choice

One-third say a friend or family member influenced their decision; 1 in 7 say healthcare profs

Top Influence on Decision to Follow a Specific Eating Pattern or Diet

(Of those following an eating pattern/diet)



1 in 3

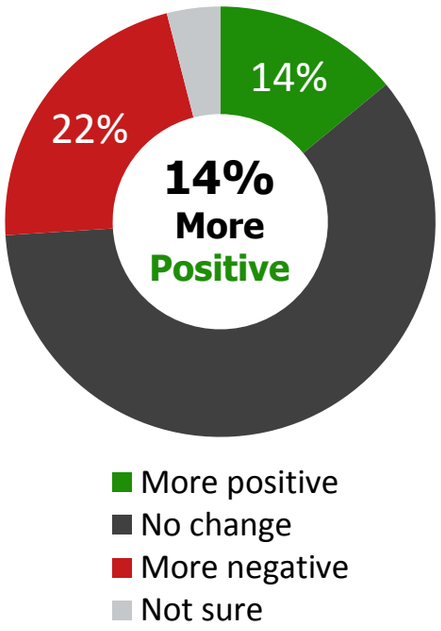
Selected an eating pattern or diet based on info from friends or family

Q: Which of the following information sources <u>most</u> influenced your decision to choose this eating pattern or diet? (Of those following a diet, n=150)

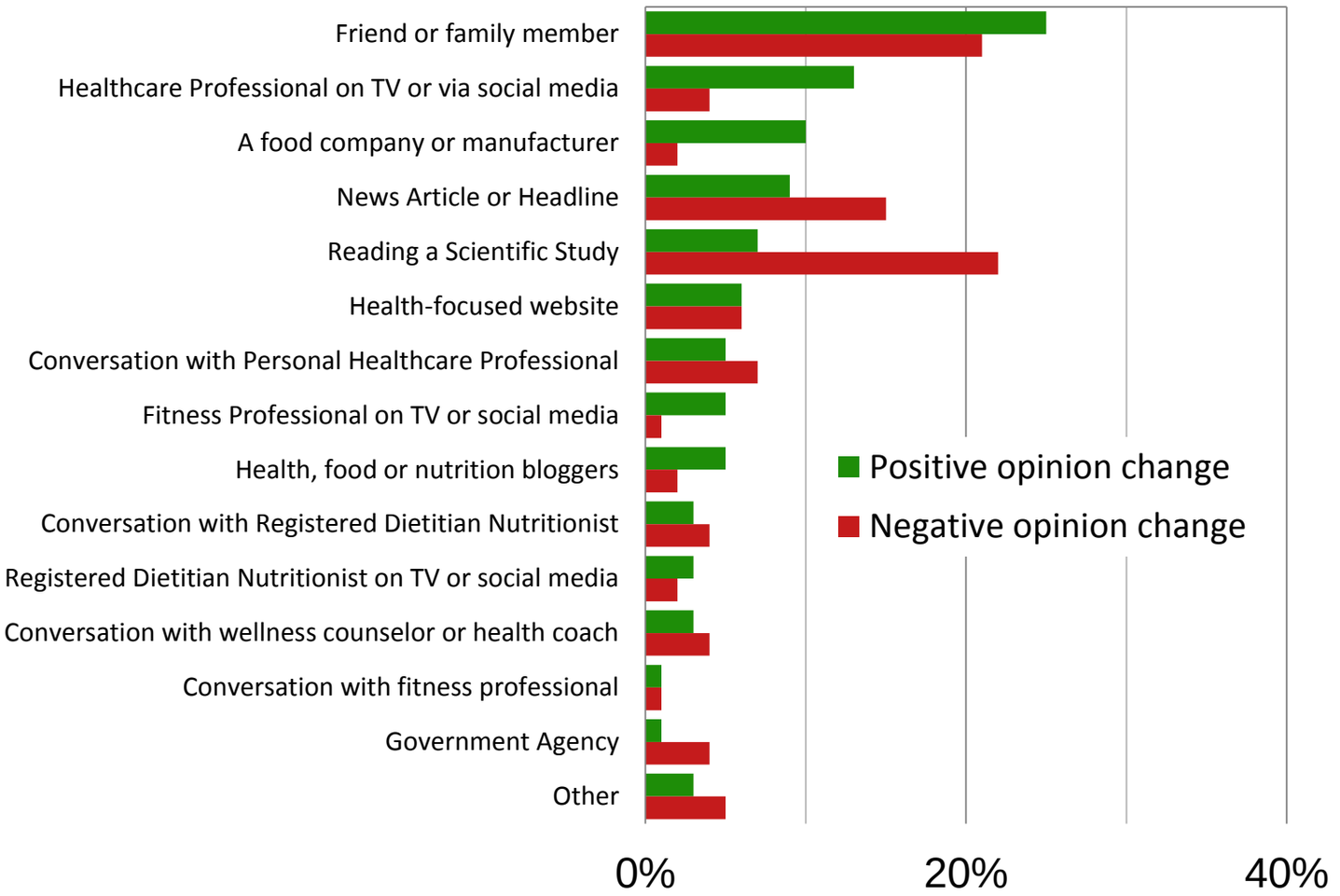
Friends and family drive sweetener opinion

One-third say a friend or family member influenced their decision; 1 in 7 say healthcare profs

Opinion Change About Low/No-Calorie Sweeteners



Top Source of Opinion Change

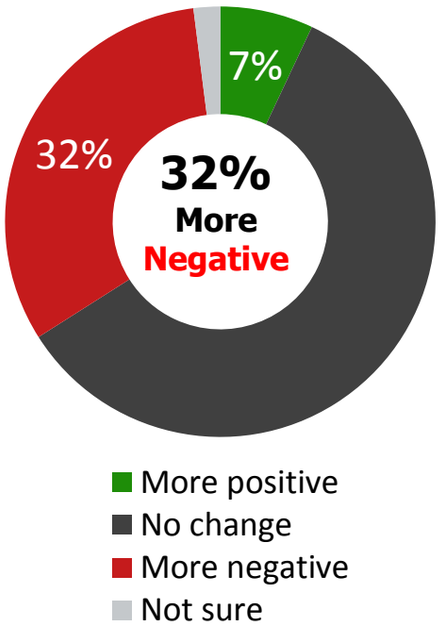


Q: Thinking about the past year, how has your opinion changed, if at all, about low/no- calorie sweeteners? (n=1,002)
Q: What one source has altered your opinion the most on low/no-calorie sweeteners? (Positive opinion change, n=96; Negative opinion change, n=220)

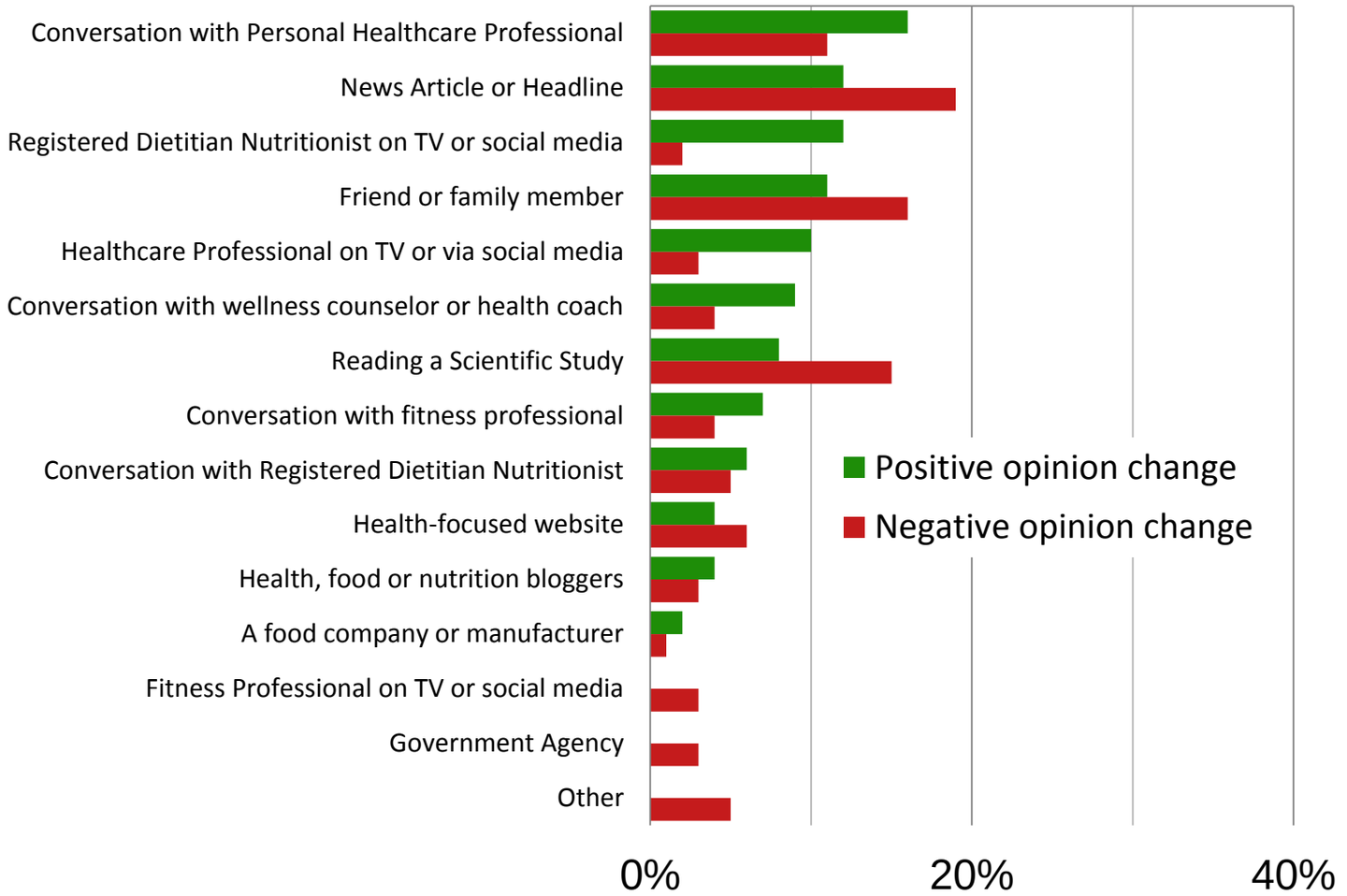
News, friends and family drive negative opinion on added sugar

Healthcare professionals, registered dietitians among those driving more positive opinion change

Opinion Change About Added Sugars



Top Source of Opinion Change

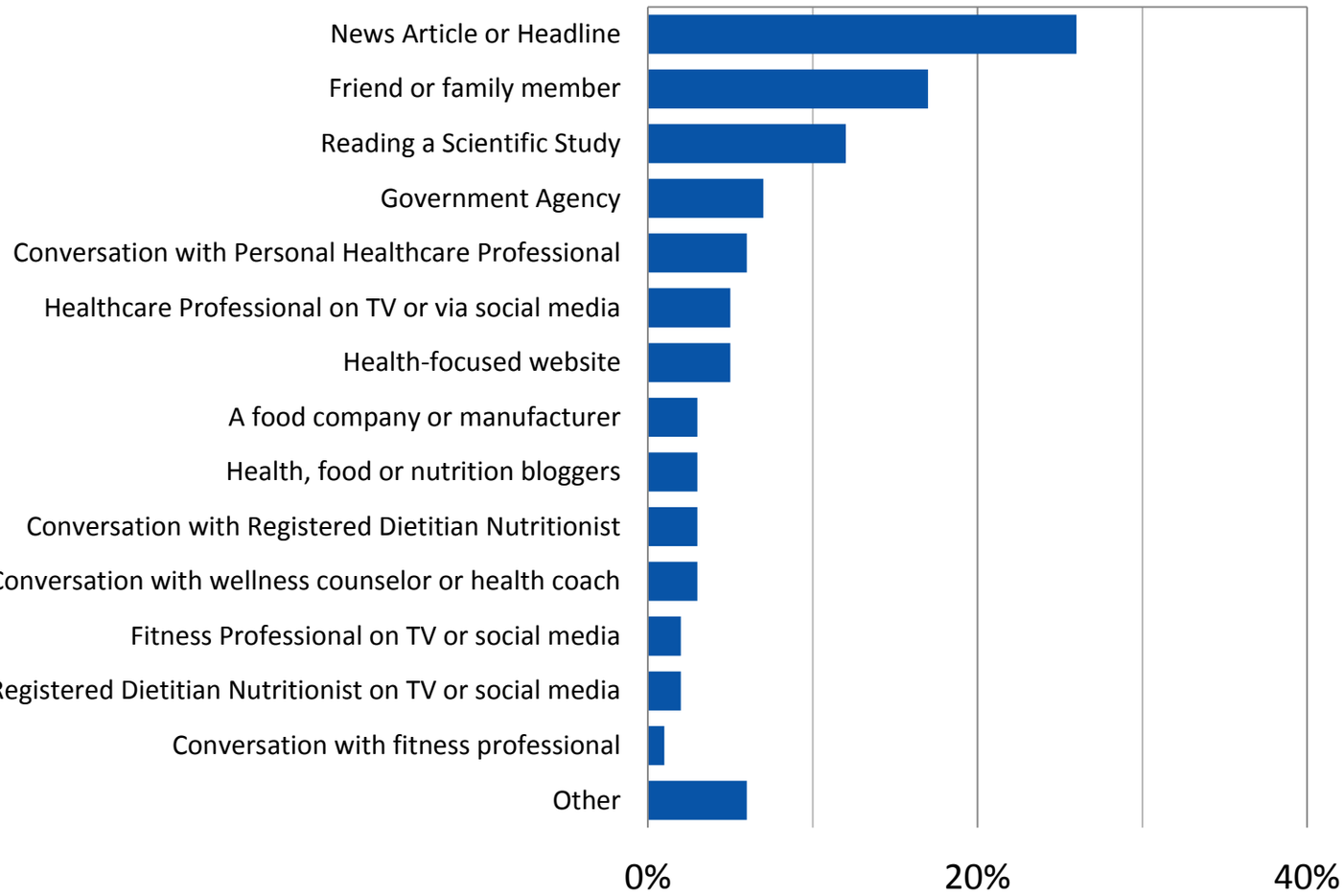


Q: Thinking about the past year, how has your opinion changed, if at all, about added sugars? (n=1,002)
Q: What one source has altered your opinion the most on added sugars? (Positive opinion change, n=74; Negative opinion change, n=336)

News, family and friends influence safety concerns

These are top sources for all concerns, except GMOs (scientific study)

Top Source of Influence on Opinion about Top Safety Concern

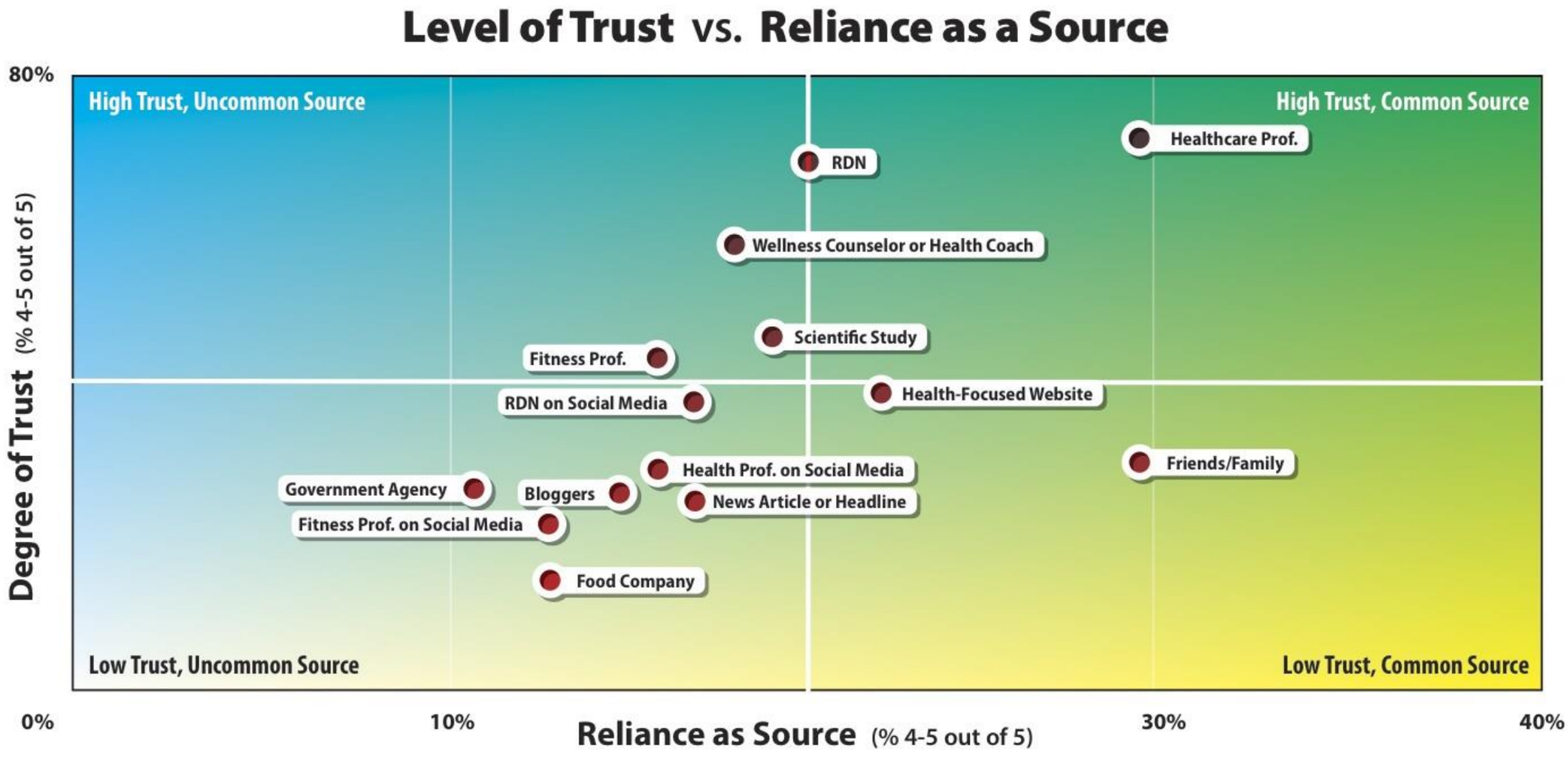


Top Concern	#1 Source	#2 Source	#3 Source
Foodborne illness	News article or headline **36%**	Friend or family **17%**	Government agency **8%**
Carcinogens	News article or headline **31%**	Reading a scientific study **17%**	Friend or family **13%**
Chemicals in food	News article or headline **24%**	Friend or family **20%**	Reading a scientific study **10%**
Pesticides	News article or headline **22%**	Friend or family **18%**	Reading a scientific study **11%**
Food additives/ ingredients	Friend or family **21%**	News article or headline **17%**	Reading a scientific study **15%**
Animal antibiotics	News article or headline **18%**	Friend or family **18%**	Reading a scientific study **13%**
Biotech/GMOs	Reading a scientific study **25%**	News article or headline **21%**	Wellness counselor **11%**
Allergens	Friend or family **24%**	Personal health prof. **14%**	Government agency **9%**

Q: What one source of information most influenced your opinion on [your top safety concern]? (n=1,002)

Americans partially rely on sources they don't trust

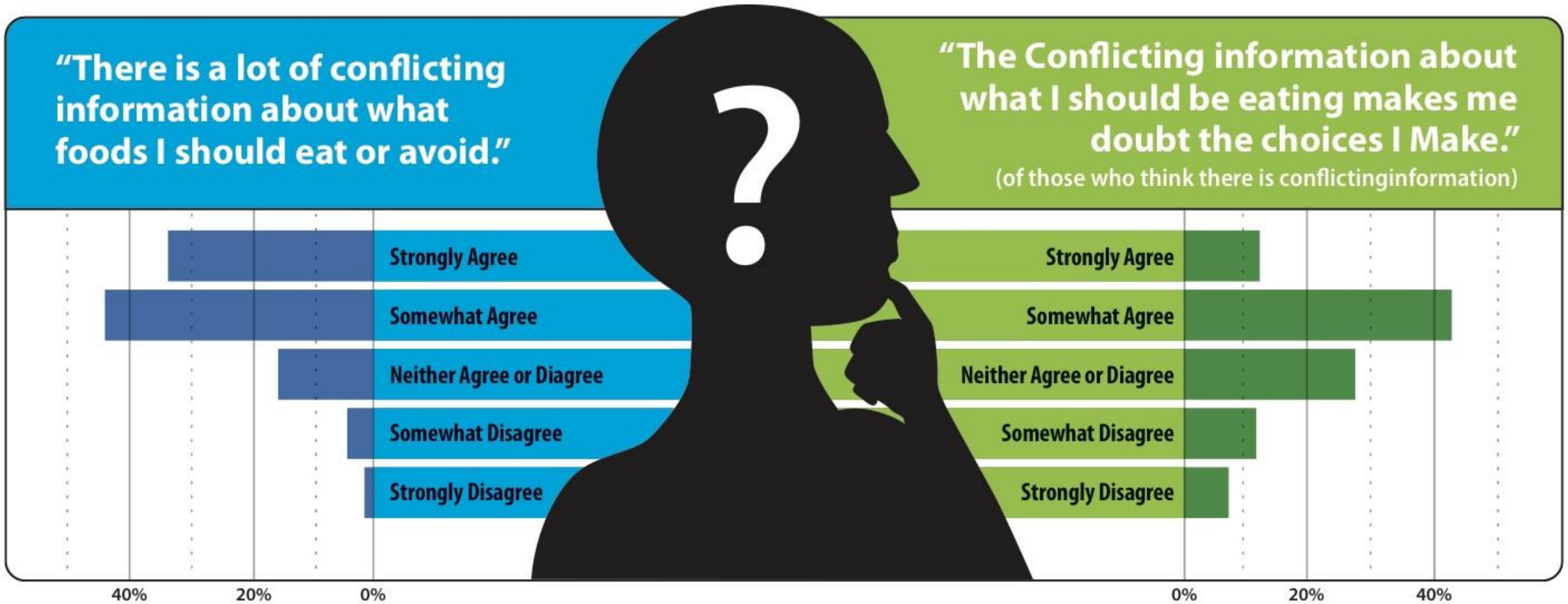
Friends and family low trust but are a common source



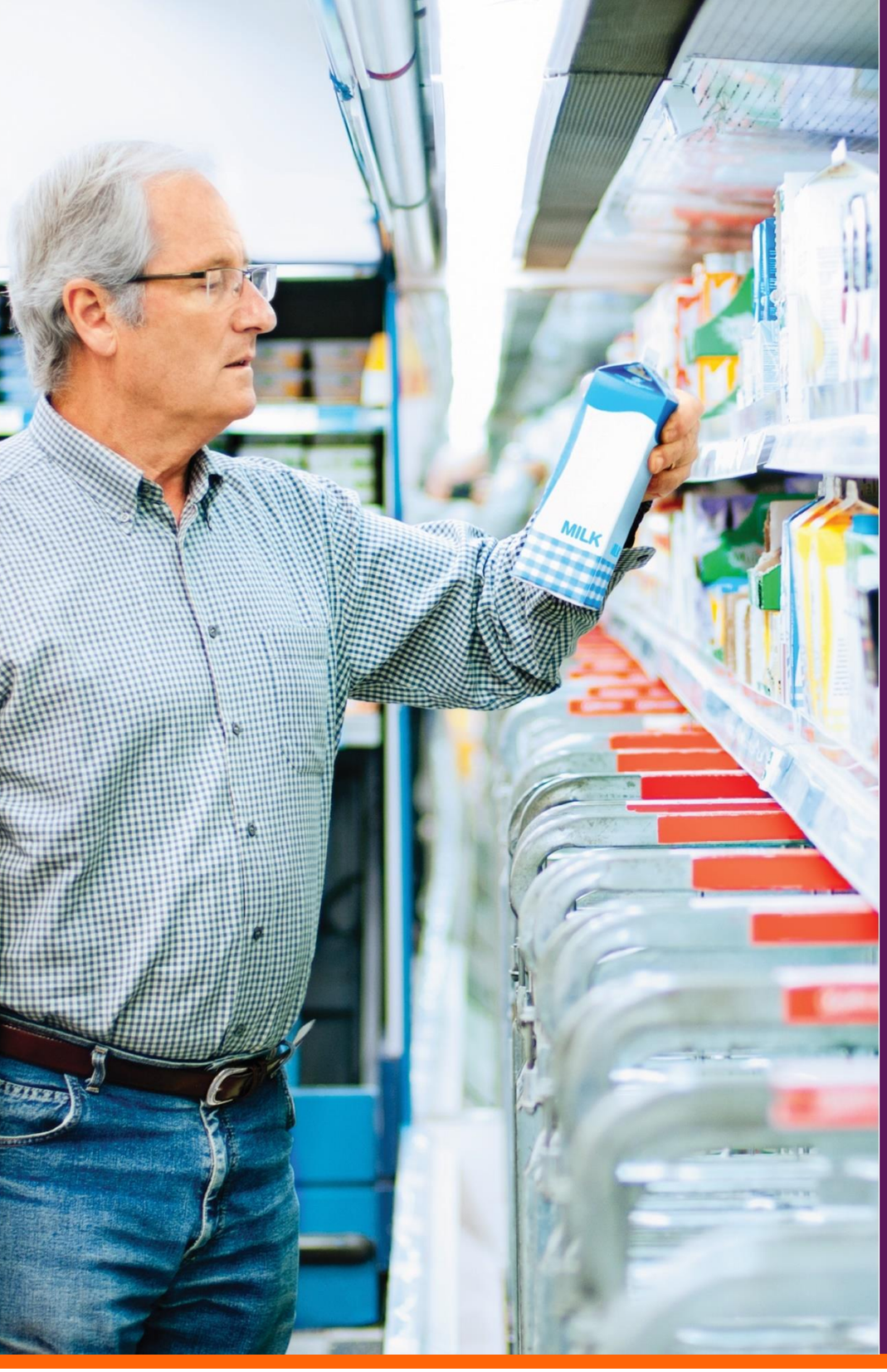
Q: How much would you trust information from the following on which foods to eat and avoid? (n=1,002), Q: How often do you get information from the following on which foods to eat and avoid? (n=1,002)

Conflicting Advice Abounds

8 in 10 find conflicting advice about what to eat or avoid, many doubt their food choices



Q: Do you agree or disagree with the following statements?
"There is a lot of conflicting information about what foods I should eat or avoid." (n=1,002)
"The conflicting information about what I should be eating makes me doubt the choices I make." (Of those who agree about conflicting information, n=775)



FOOD CONFUSION:

DIETARY DISCONNECT

Many Americans want health benefits from food but struggle to understand which foods are associated with specific benefits. This disconnect may be fueled, at least in part, by the abundance of conflicting nutrition information.

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2017 FOOD & HEALTH SURVEY

Fewer than half link most desired benefit with foods

After indicating what benefit they would most like from food, many can't name a specific source

Top 4 Desired Health Benefits	% Could Not Name a Food/Nutrient
Weight Management	60%
Cardiovascular Health	49%
Increased Energy	57%
Digestive Health	50%

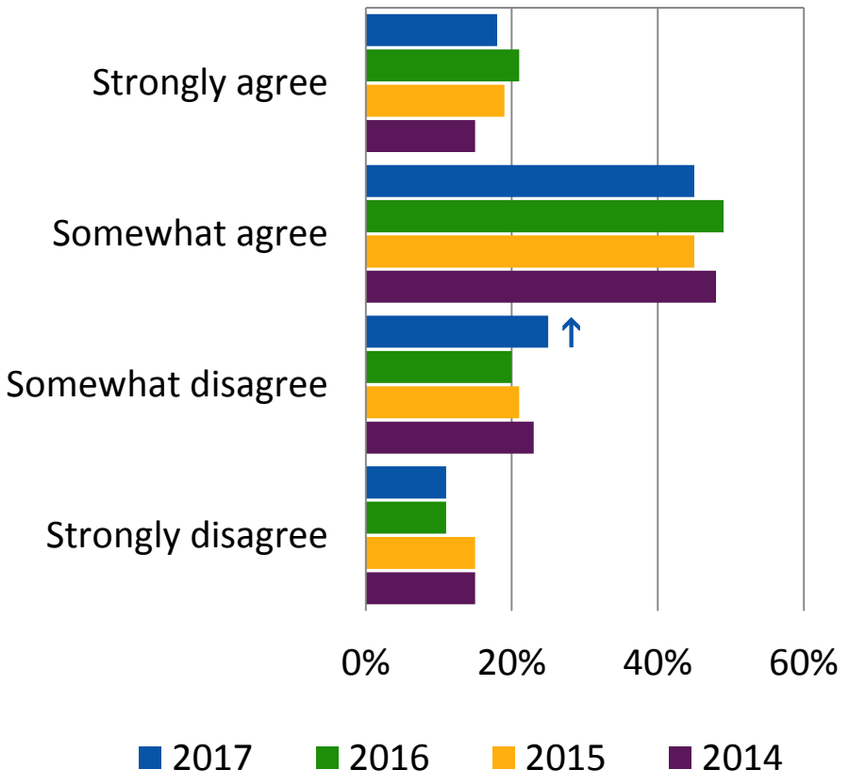
Q: Can you name a food or nutrient that you would seek out to help with this health benefit? (Of those who named a desired benefit, n=964)

Fewer than 1 in 5 are sure of their caffeine intake

Nearly half don't know whether naturally-occurring and added caffeine have same effect

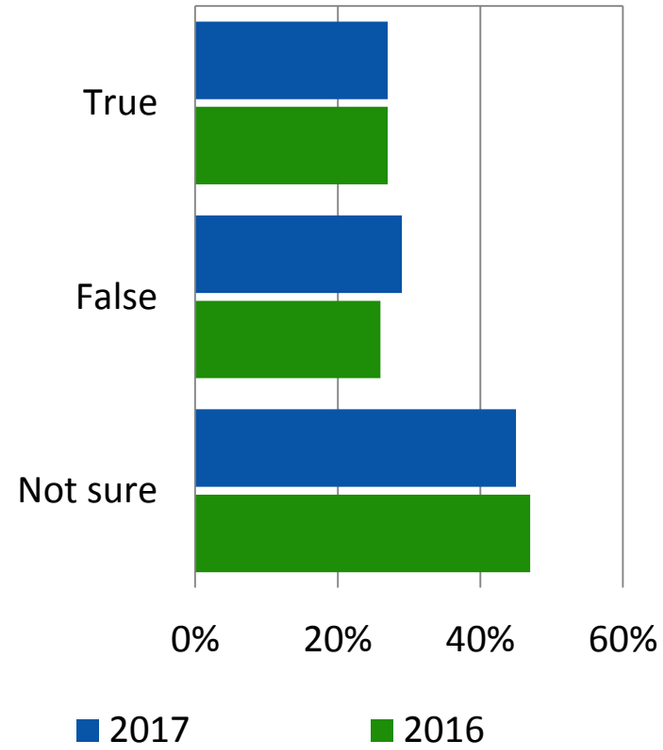
Knows the Amount of Caffeine in Foods and Beverages Consumed

(Of those who consume caffeine)



True or False:

Caffeine that is naturally occurring has the same effect as caffeine that is added

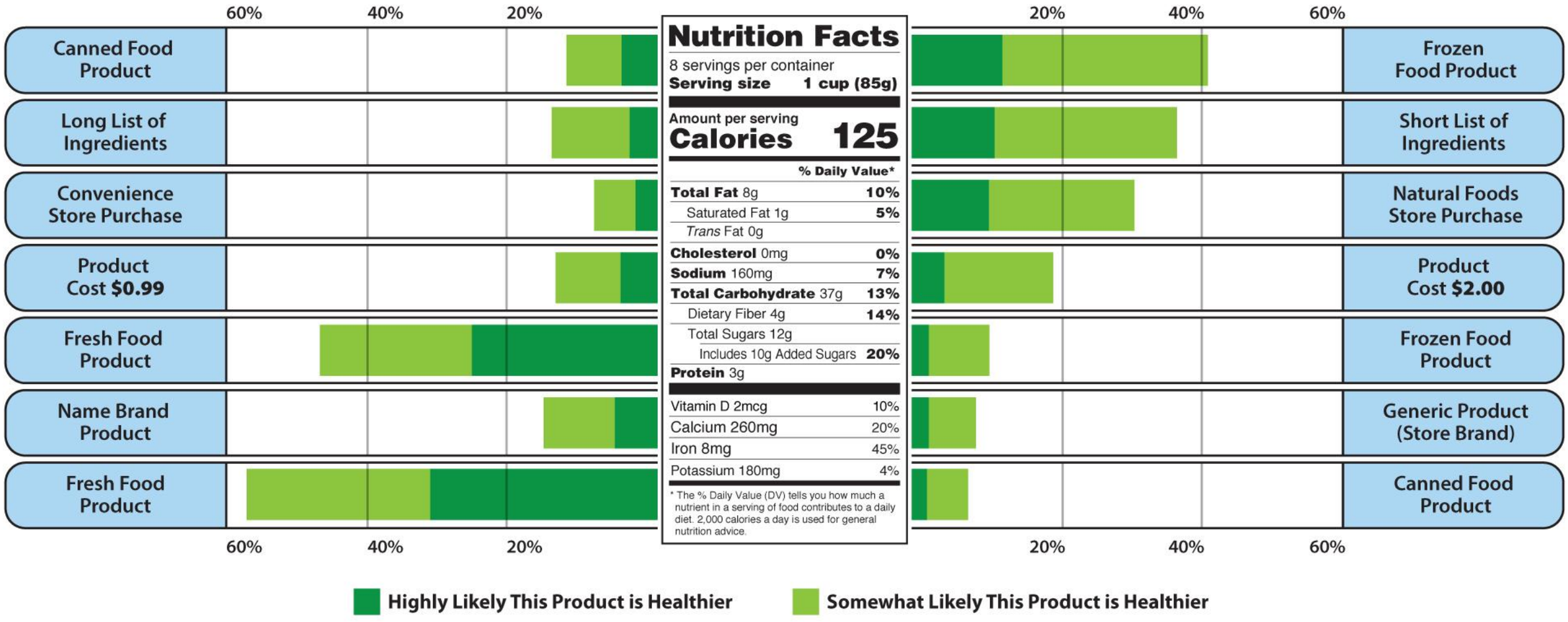


Q: Please indicate how much you agree or disagree with the following statement: I know the amount of caffeine that is in the foods and beverages I consume. (Of those who consume caffeine, n=943)
Q: Please indicate whether the following statement is true or false: Caffeine that is naturally occurring in foods and beverages has the same effect as caffeine that is added to foods and beverages. (n=1,002)

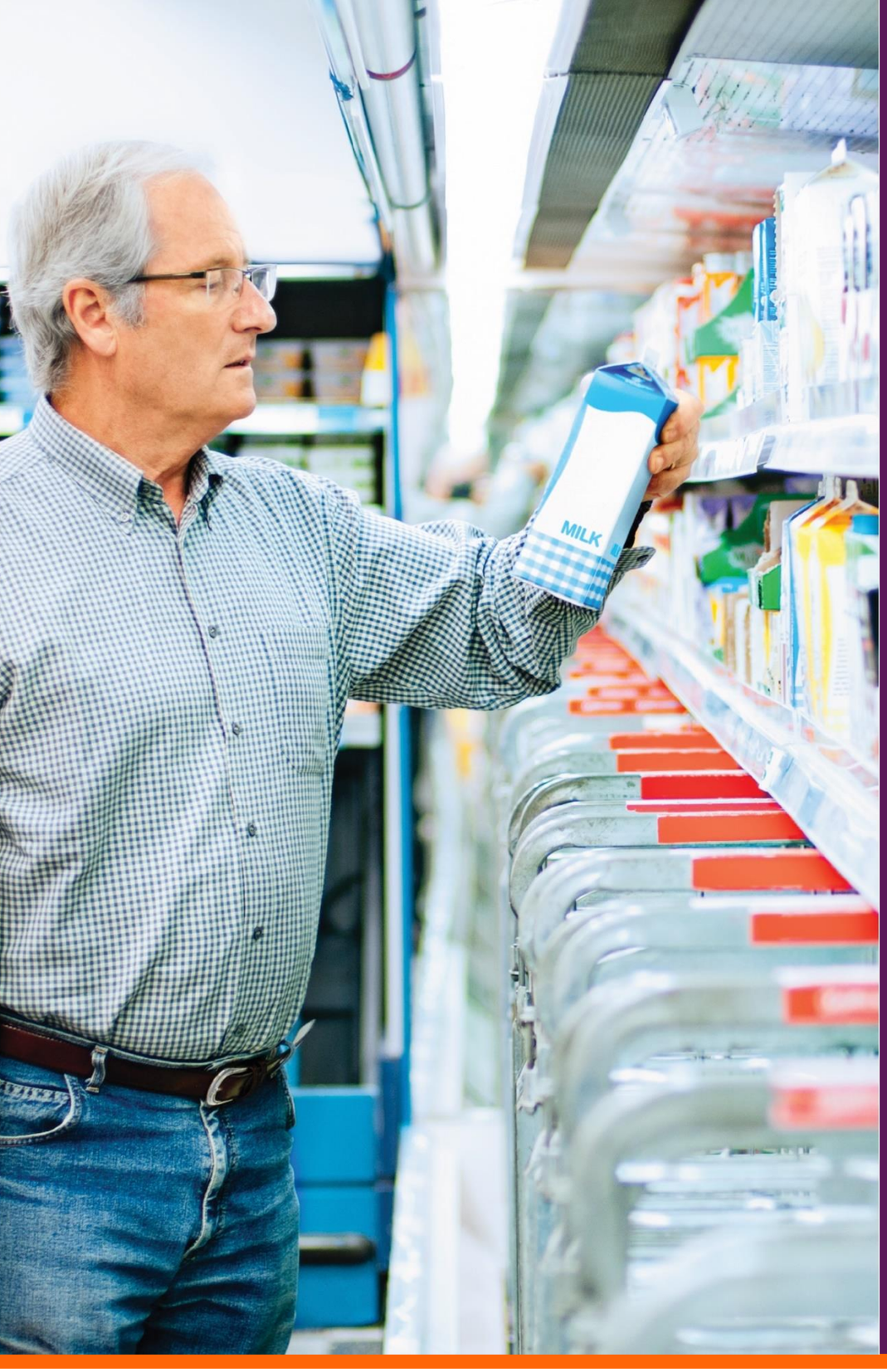
Factors beyond nutrition create a health halo

Form, place of purchase and length of ingredient list, among other factors, affect the perceived healthfulness of nutritionally identical products

If Two Products Have the Same Nutrition Facts Panel… Which is Healthier?



Q: Imagine you came across two food products that had the exact same Nutrition Facts panel. Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,002)



FOOD CONFUSION:

SPLIT ON SWEETENERS

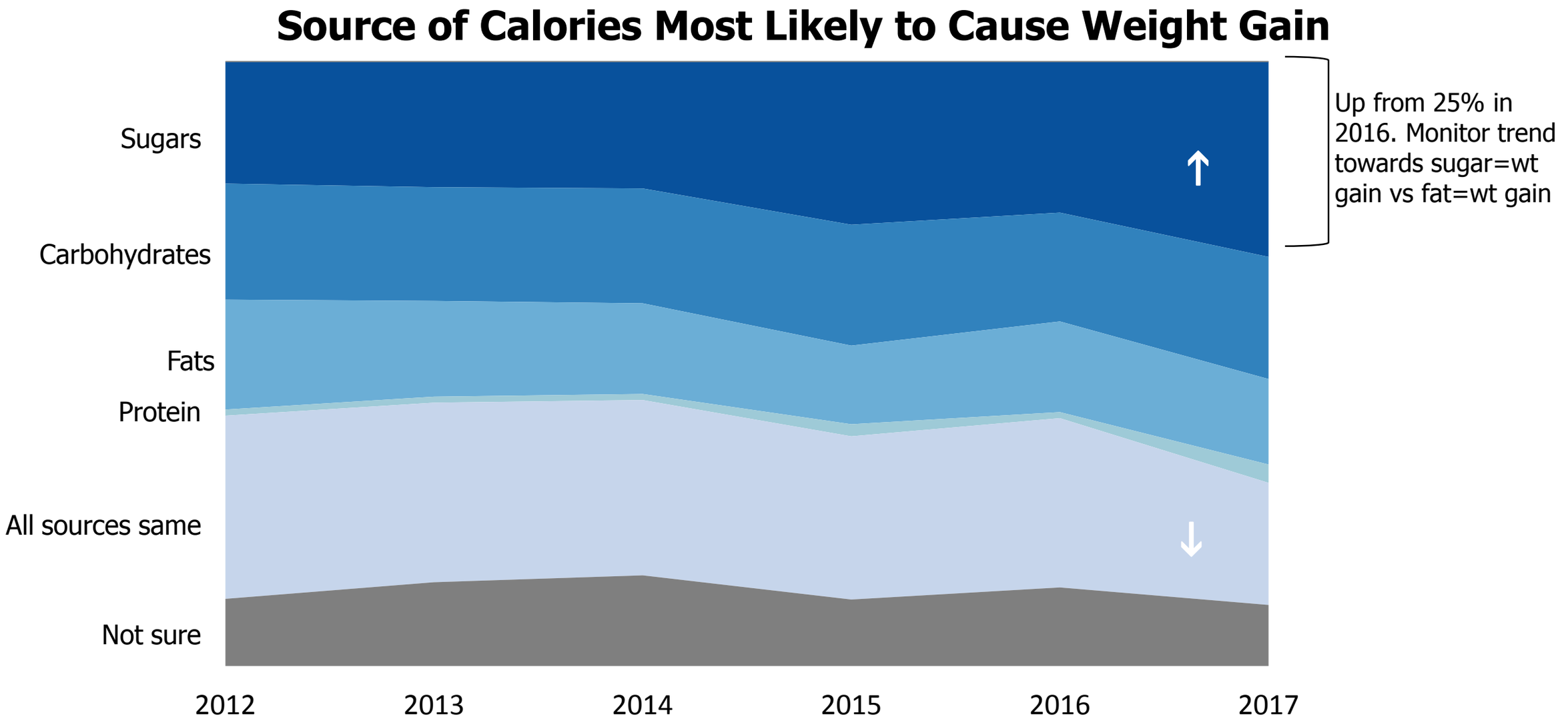
The abundance of conflicting nutrition information leads to divided perceptions of sweeteners. Opinions on both low-calorie sweeteners and added sugars have grown more polarized in the past year, with friends and family driving these opinions.

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More consumers link sugars to weight gain

One-third of Americans, up from 25% in 2016, say sugars are most likely to cause weight gain

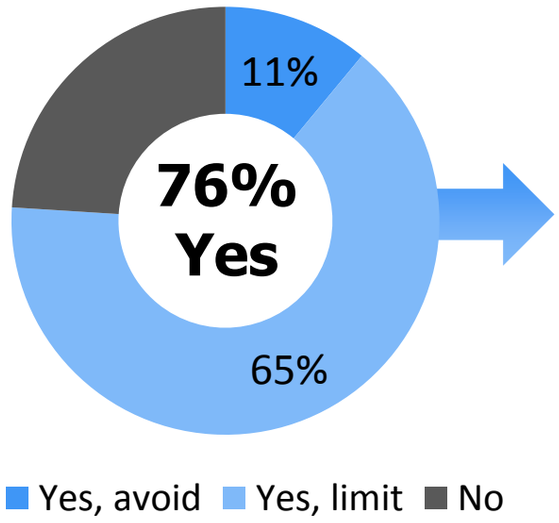


Q: What source of calories is the most likely to cause weight gain? (n=1,002)

Majority are trying to avoid/limit sugars

Replacing beverages with water, eliminating certain foods are top ways consumers limit sugars

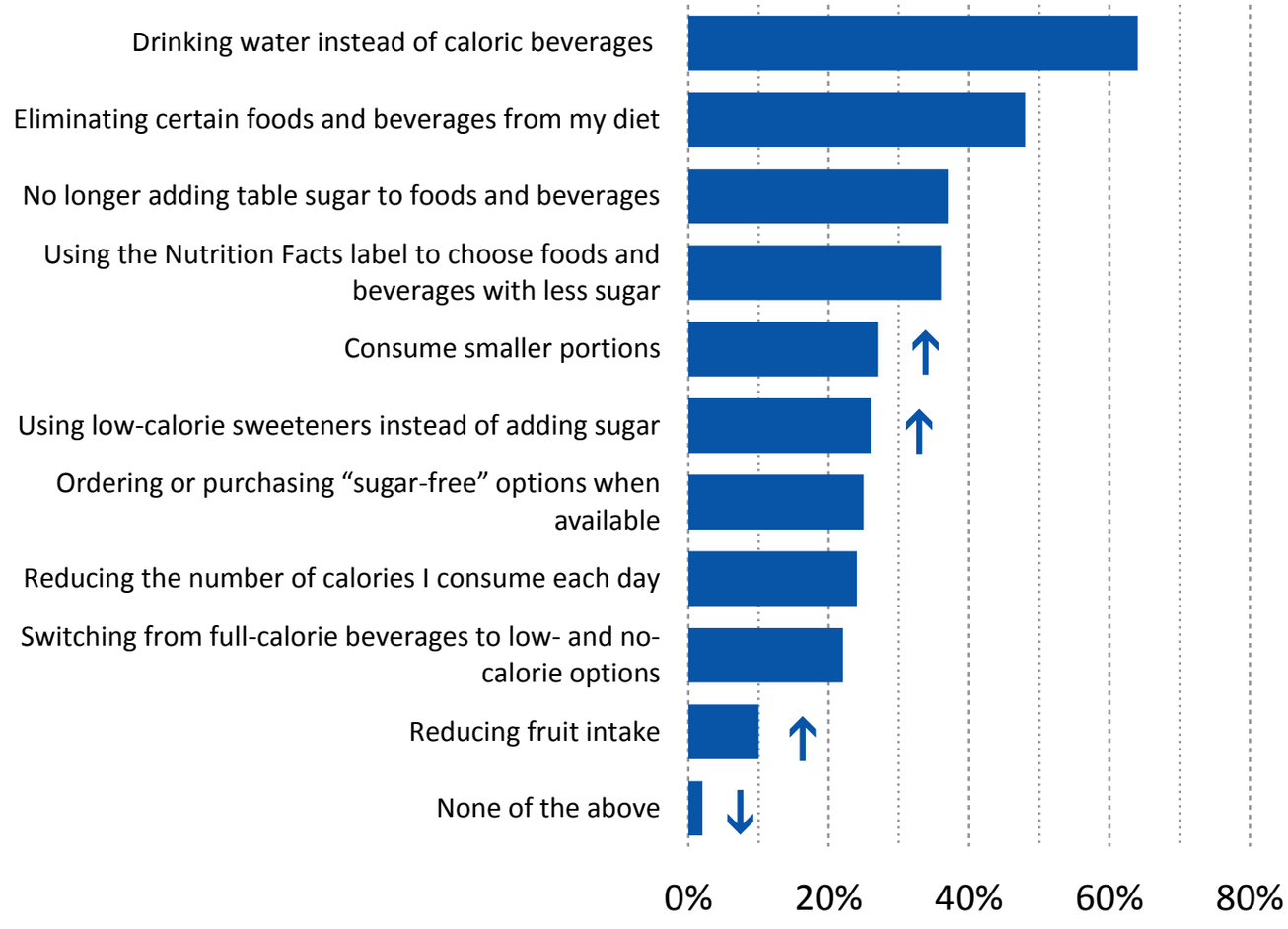
Trying to Avoid/Limit Sugars?



91%
Of those who regularly use nutrition info to decide where to eat out say they are trying to avoid or limit sugars

Actions Taken to Avoid/Limit Sugars?

(Of those avoiding/limiting sugars)



Q: Are you trying to limit or avoid sugars in your diet? (n=1,002)
Q: What action(s) are you taking to limit or avoid sugars? Select all that apply. (Of those avoiding/limiting sugar, n=774)

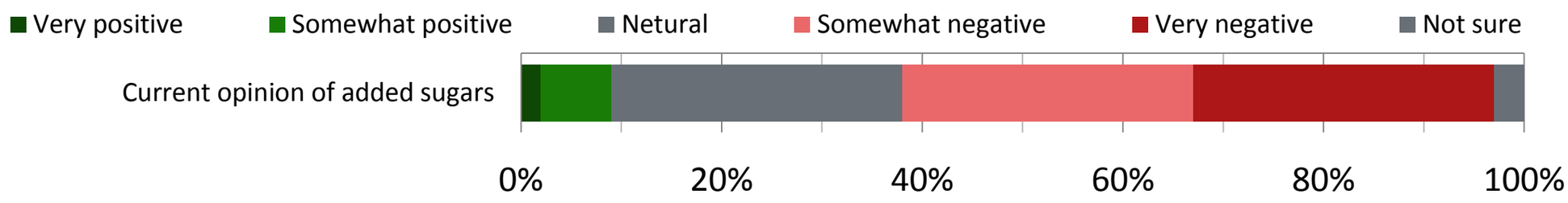
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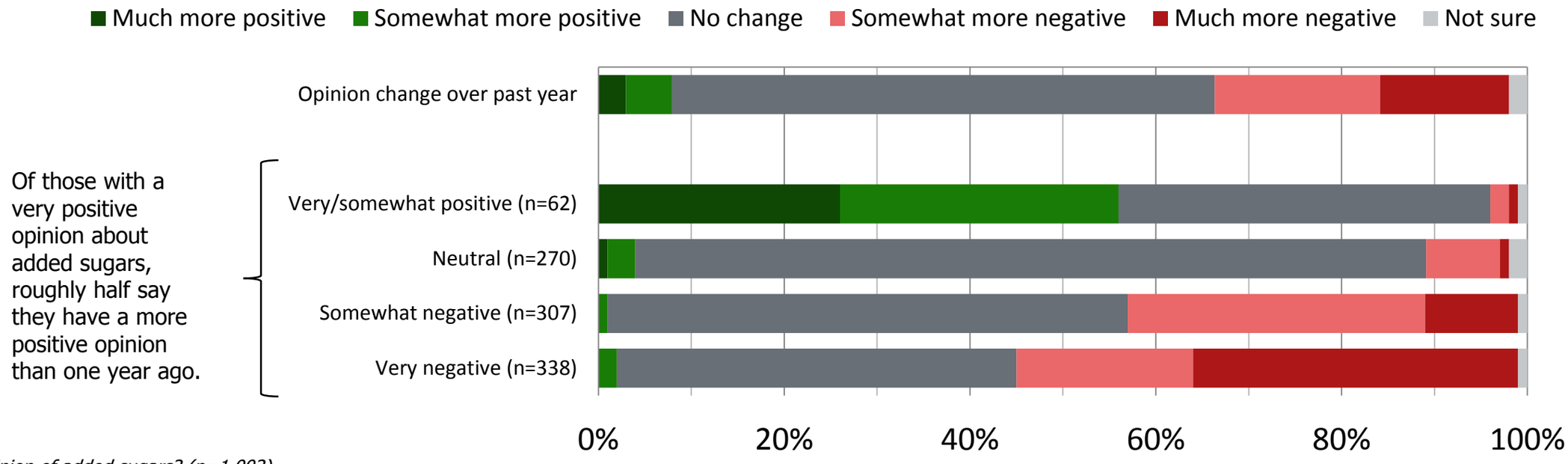
6 in 10 view added sugars negatively

Opinions about added sugars have grown increasingly polarized over the past year

Current Opinion of Added Sugars



Opinion Change Over Past Year

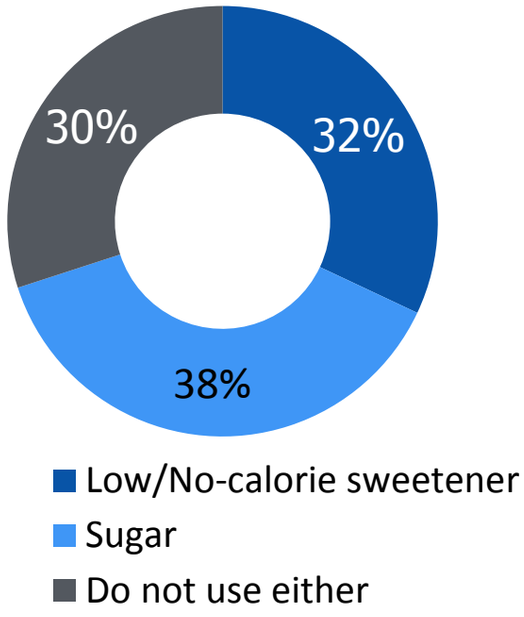


Q: What is your opinion of added sugars? (n=1,002)
Q: Thinking about the past year, how has your opinion changed, if at all, about added sugars? (n=1,002)

Split on low-calorie sweeteners

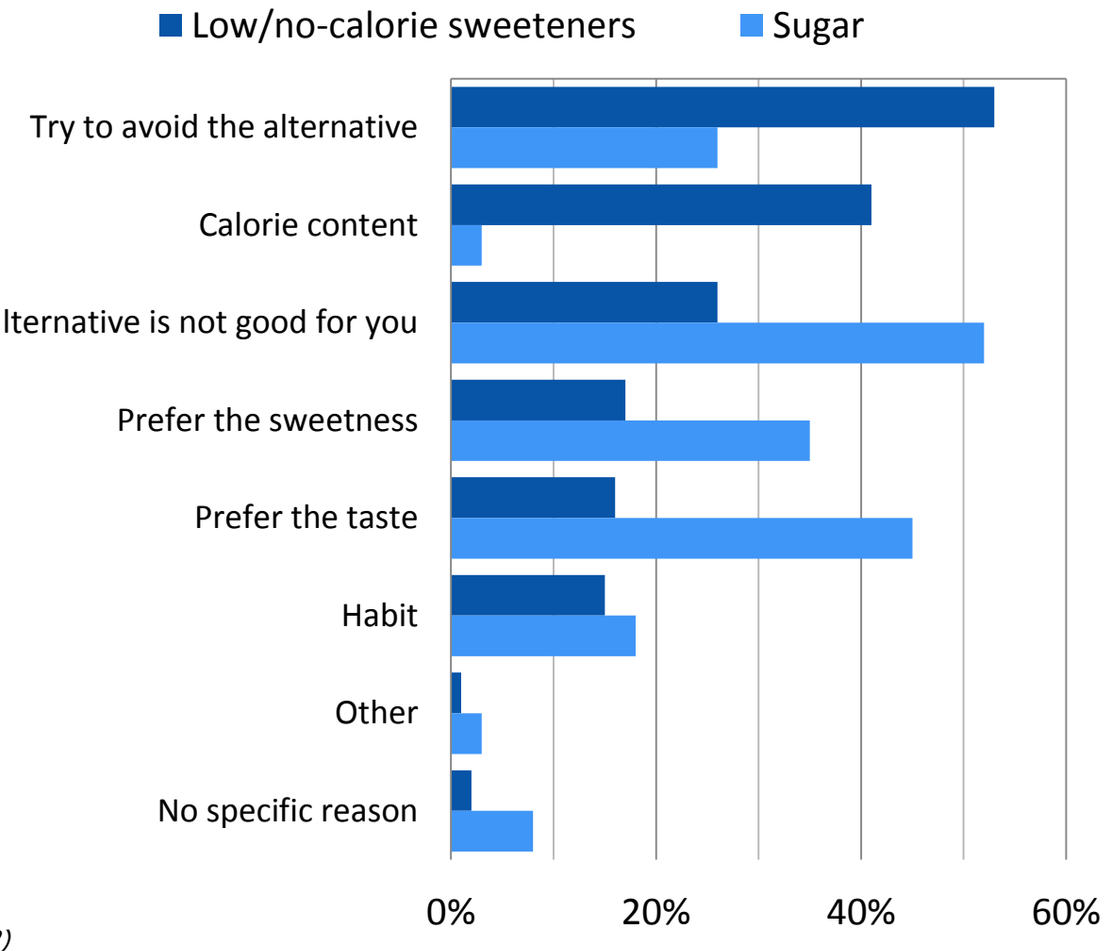
Half who prefer sugar do so because of belief that alternative is not good for you

More Likely to Use to Sweeten A Food or Beverage



55%
Of those who have a non-communicable disease prefer low/no-calorie sweeteners

Why Consumers Prefer Sugar or Low/No-Calorie Sweeteners



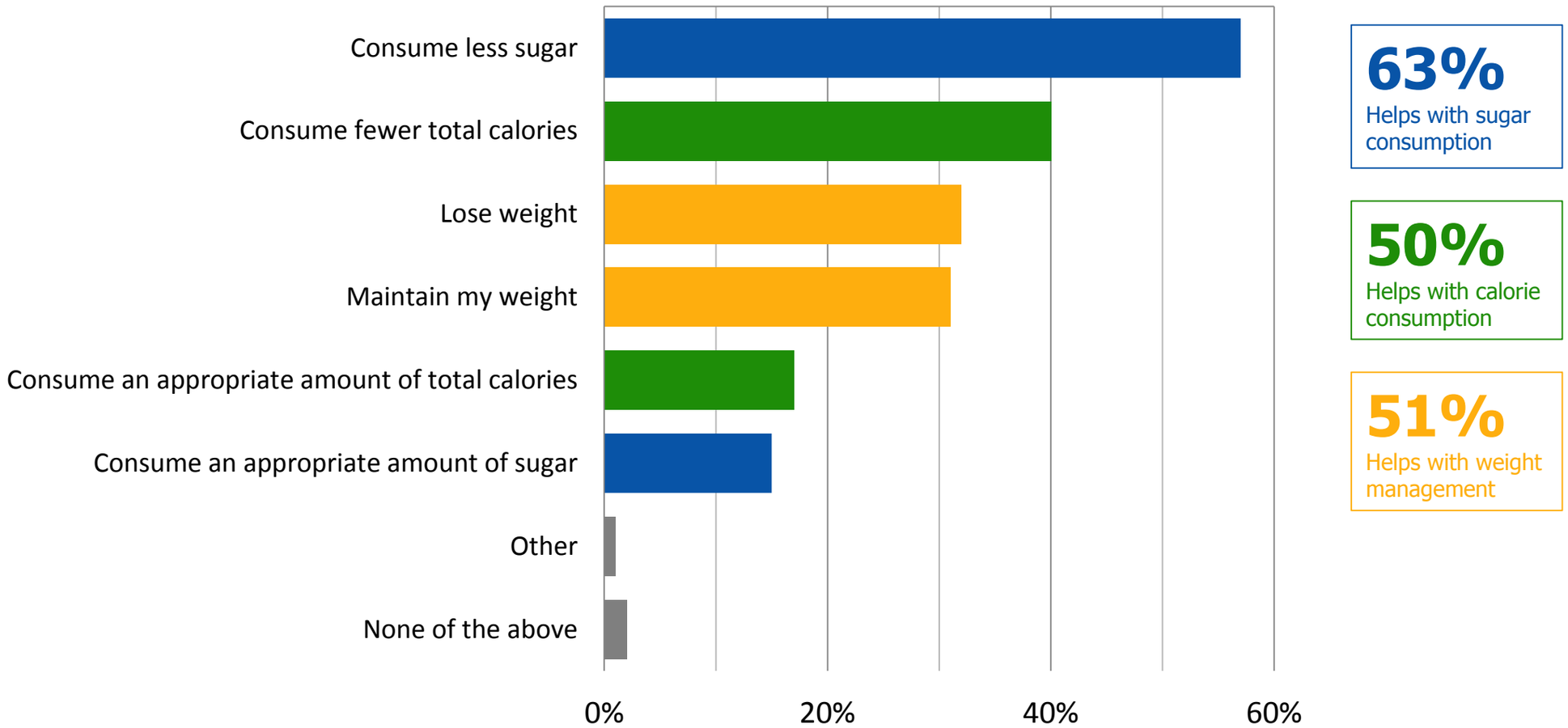
Q: Which of the following are you more likely to use to sweeten foods and/or beverages? (n=1,002)
Q: Why? Select all that apply. (Of those who prefer sugar, n=378; Of those who prefer low/no-calorie sweeteners, n=301)

Sweeteners sought after for specific benefits

Half or more who prefer sweeteners say they help with sugar/calorie consumption, weight

What Do Low/No-Calorie Sweeteners Help With?

(Of Those Who Prefer Them Over Sugar)



63%
Helps with sugar consumption

50%
Helps with calorie consumption

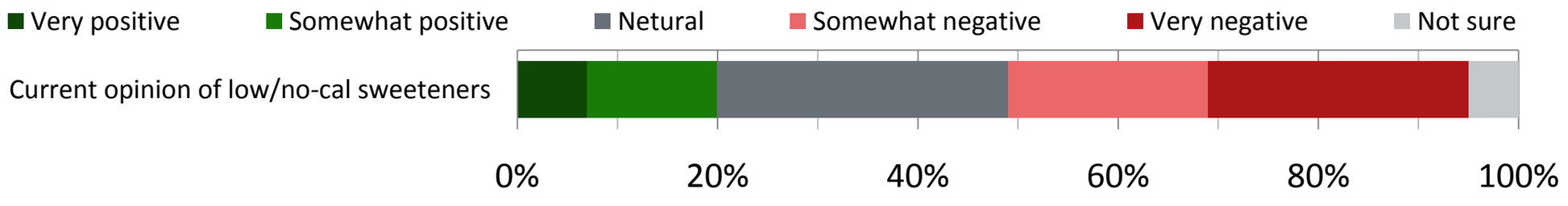
51%
Helps with weight management

Q: Which of the following, if any, do you believe consuming low/no-calorie sweeteners helps you do? Select all that apply. (Of those who prefer low/no-calorie sweeteners, n=301)

1 in 5 have positive opinion of low-calorie sweeteners

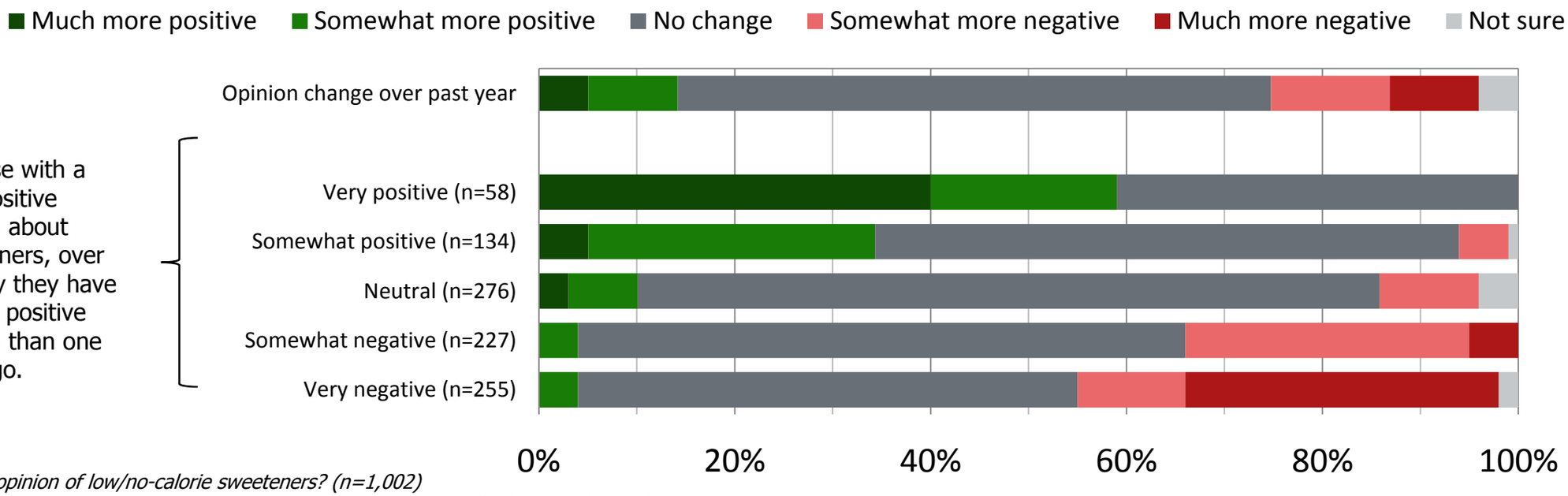
Like added sugars, opinions about sweeteners have become increasingly polarized

Current Opinion of Low/No-Calorie Sweeteners



Opinion Change Over Past Year

Of those with a very positive opinion about sweeteners, over half say they have a more positive opinion than one year ago.



Q: What is your opinion of low/no-calorie sweeteners? (n=1,002)
Q: Thinking about the past year, how has your opinion changed, if at all, about low/no- calorie sweeteners? (n=1,002)



UNPACKING "PROCESSED"

The definition of "processed foods" is arbitrary. Considerations like organic vs conventional, homemade vs store-bought and fresh vs frozen vs canned seem to all affect our individualized definition of "processed foods."

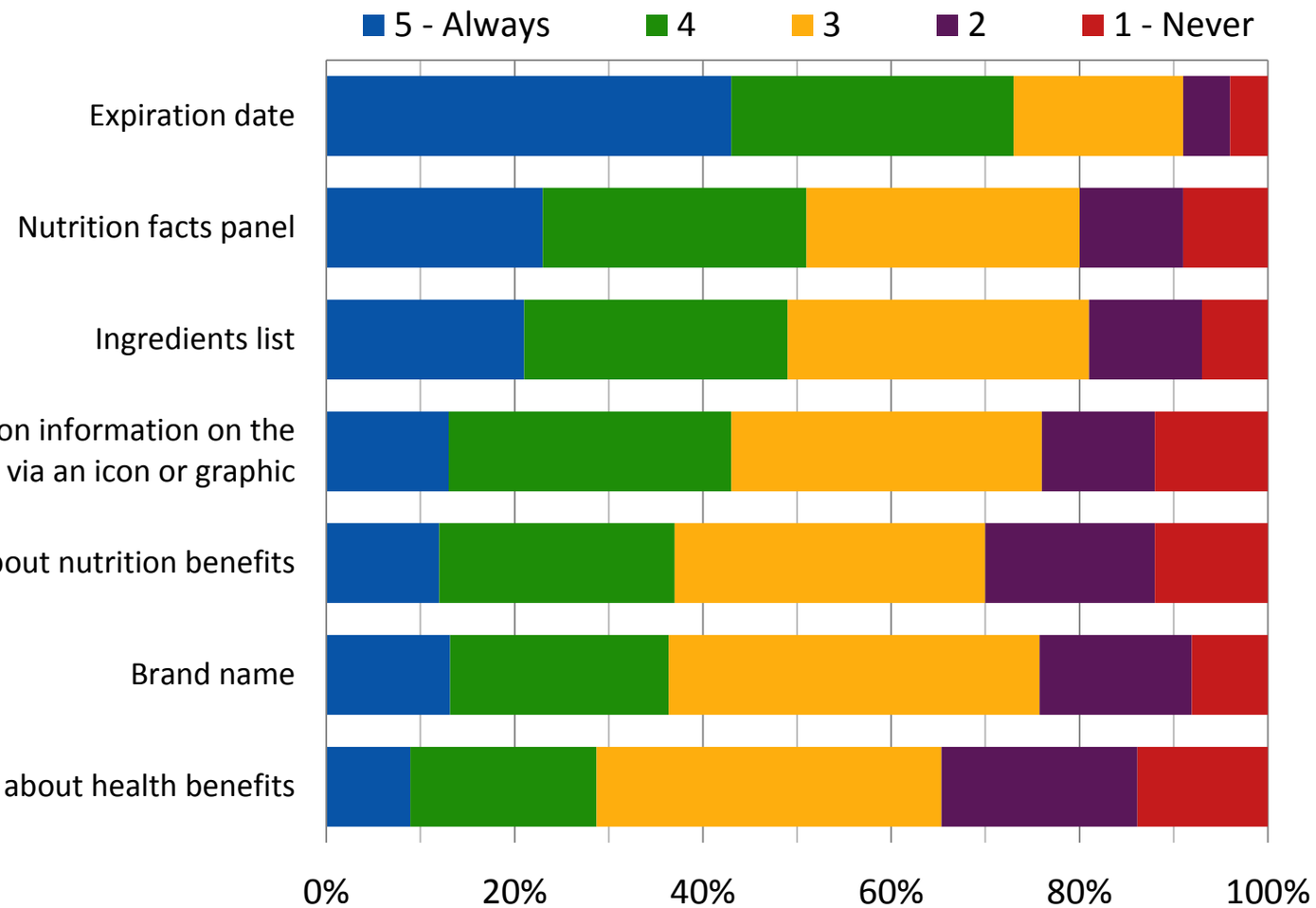
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Expiration, NFP, and ingredients are key

Similar to previous years, this packaging information is most frequently consulted when shopping

Packaging Information Consulted During Purchase



Women are more likely to consult the expiration date, NFP, ingredients list, and statements about nutrition benefits

51%

Of Boomers say they often look at calorie/nutrition icons/graphics, vs. **36%** of millennials

Boomers are also more likely to consult the expiration date, ingredients list, and brand name

39%

Of lower income consumers look at statements about health benefits, vs. **26%** of higher income consumers

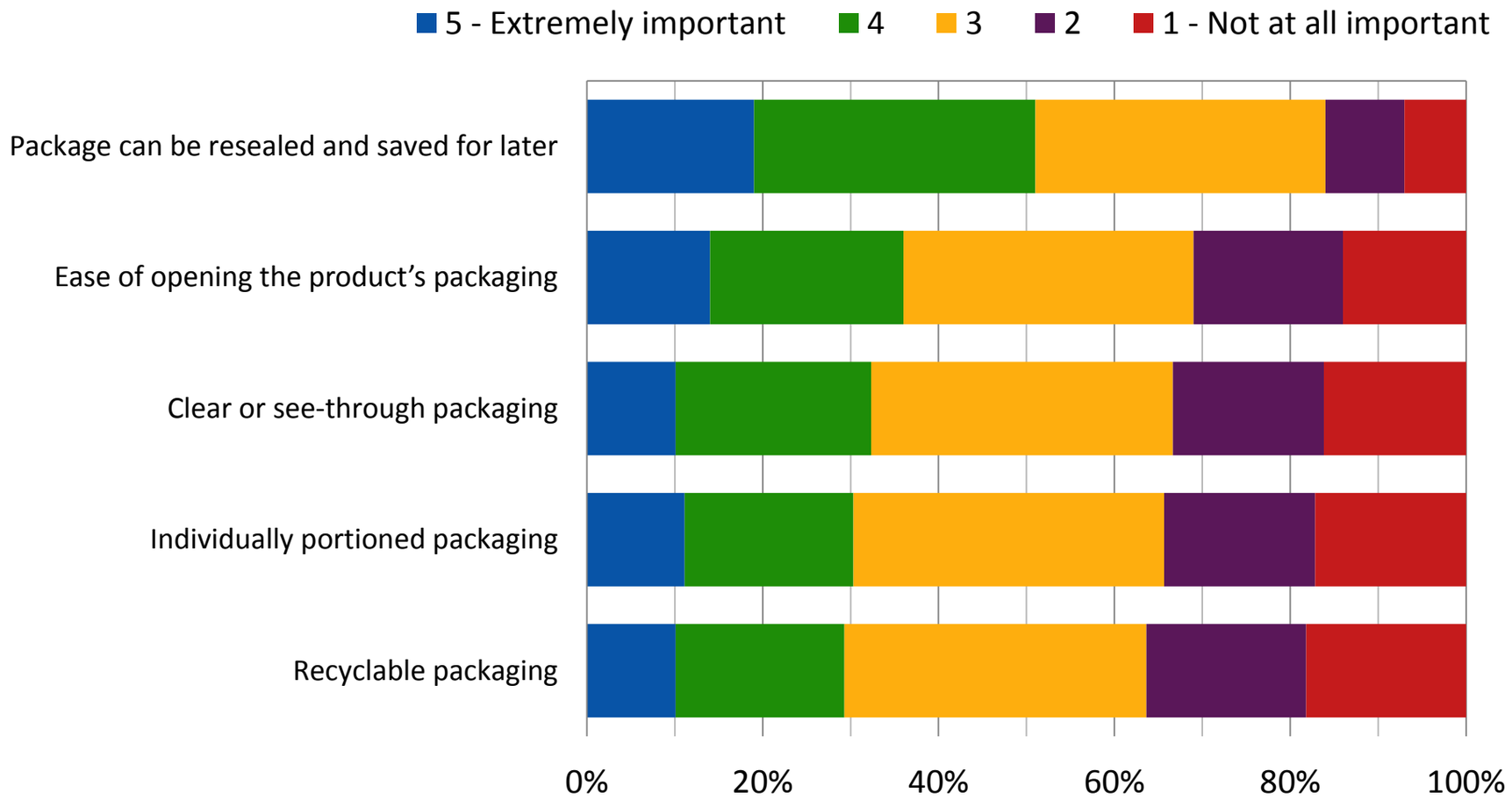
Hispanic consumers are more likely to consult a variety of packaging information

Q:How often do you consult the following packaging information before deciding to purchase a food or beverage? (n=1,002)

Packaging functionality matters

While some consumers are unconcerned, many place high importance on packaging functionality

Importance of Packaging



50%
Of lower income consumers think ease of opening is highly important, vs. **34%** of higher income consumers. They also care more about see-through packaging.

38%
Of Boomers say see through packaging is highly important, vs. **29%** of millennials

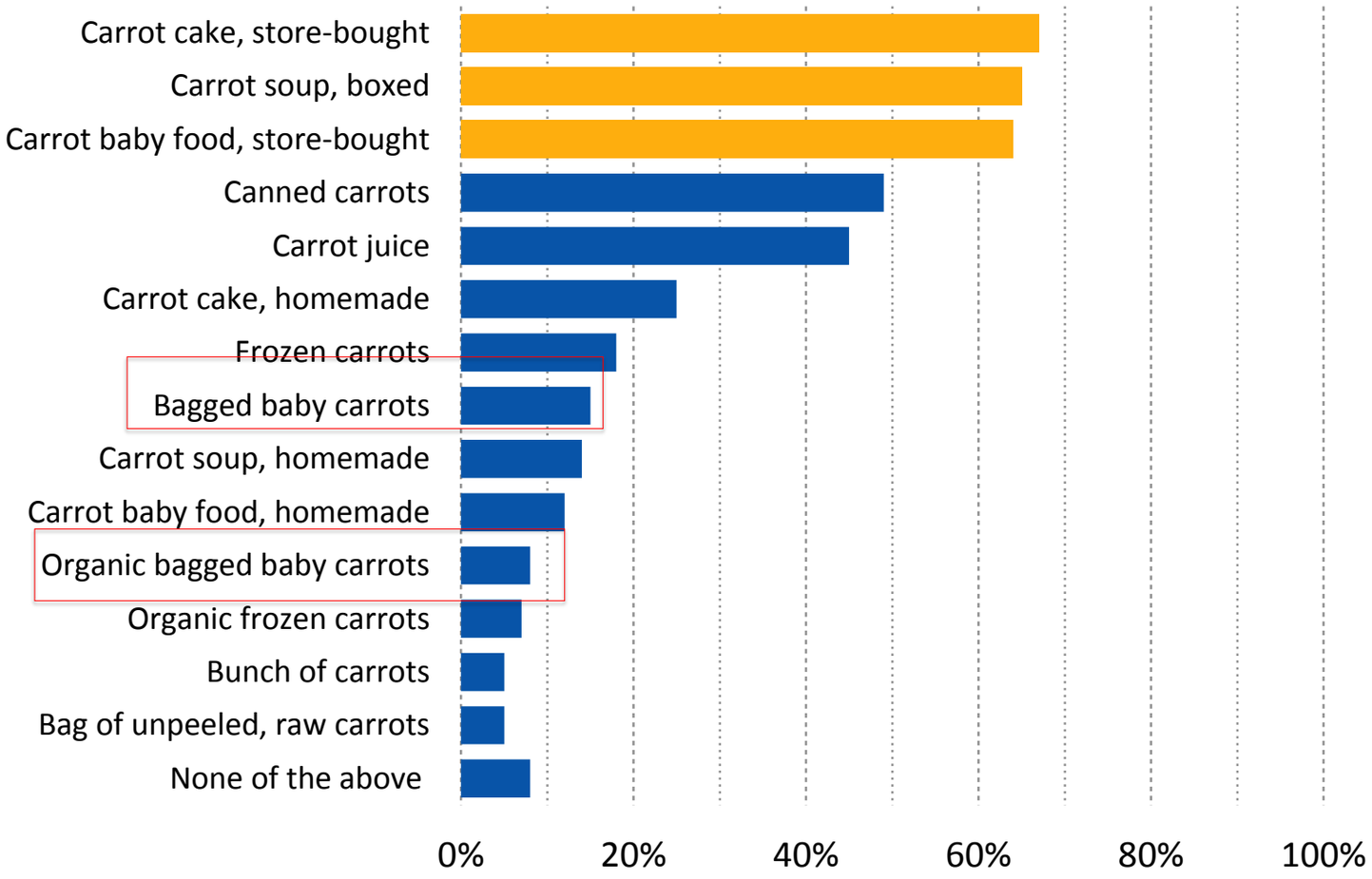
Hispanic consumers are more likely to see all packaging factors as highly important, with the exception of re-sealable packaging

Q:How important are the following factors when you are purchasing a food or beverage? (n=1,002)

“Processed” is defined by the consumer

Organic, home-made and form are all factors associated with perception of processed

What Do Consumers Consider to be “Processed”?



Nearly double see bagged baby carrots as processed compared to the same product, but organic.

Q: Which of the options below would you consider to be processed foods? Select all that apply. (n=1,002)

Consumers are interested in convenience

Convenience, time saved more important than safety, food waste for processed, packaged foods

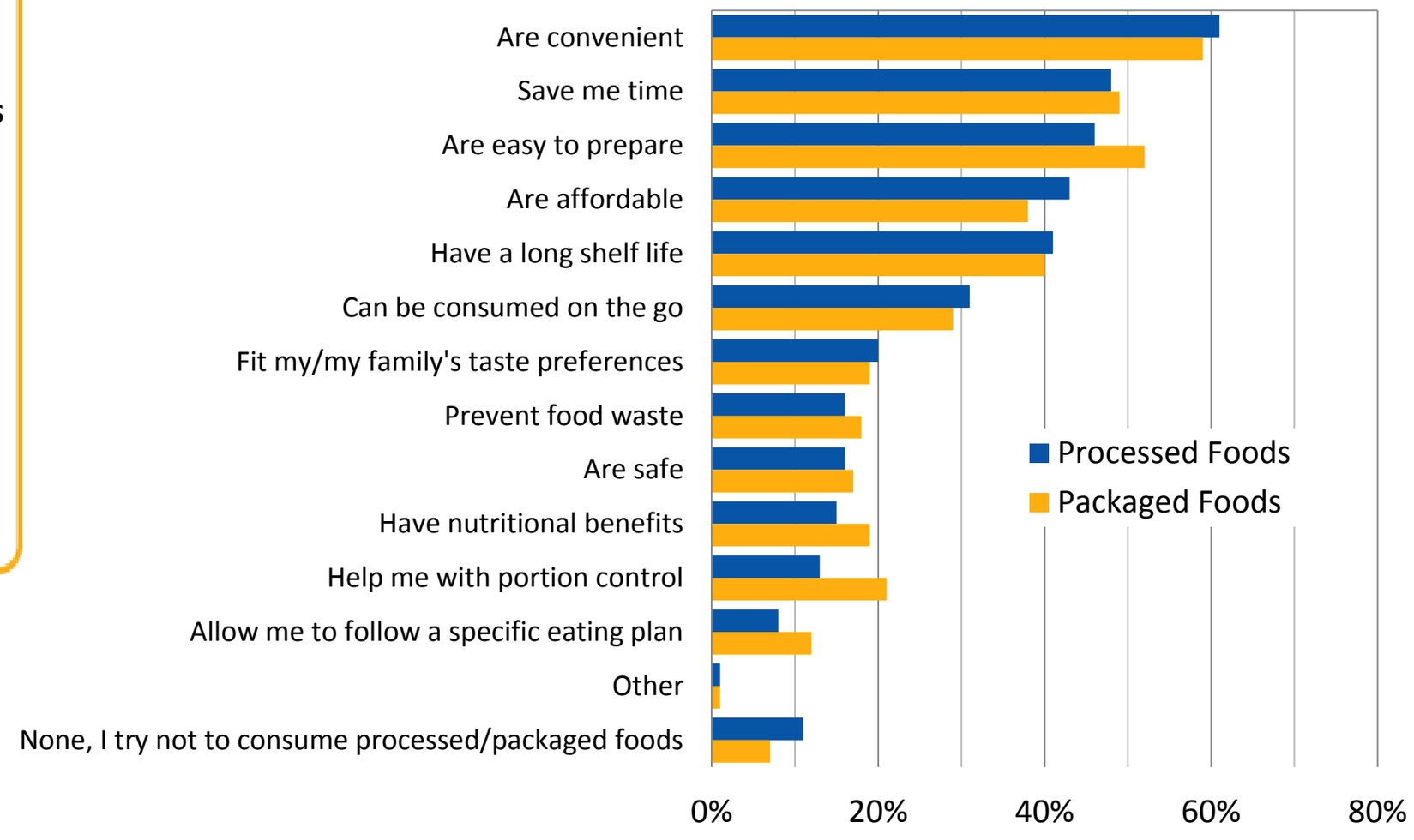
78%

Are swayed to consume packaged foods by reasons related to making life easier:

- Convenience
- Time-saving
- Ease of preparation
- Can be consumed on the go

For processed foods, the same is true for 75% of consumers.

Reasons to Consume Processed or Packaged Foods



Q: Which of the following do you consider to be reasons why you might consume processed/packaged foods? Select all that apply.. (Processed split sample, n=501; Packaged split sample, n=501)

Americans prioritize saving

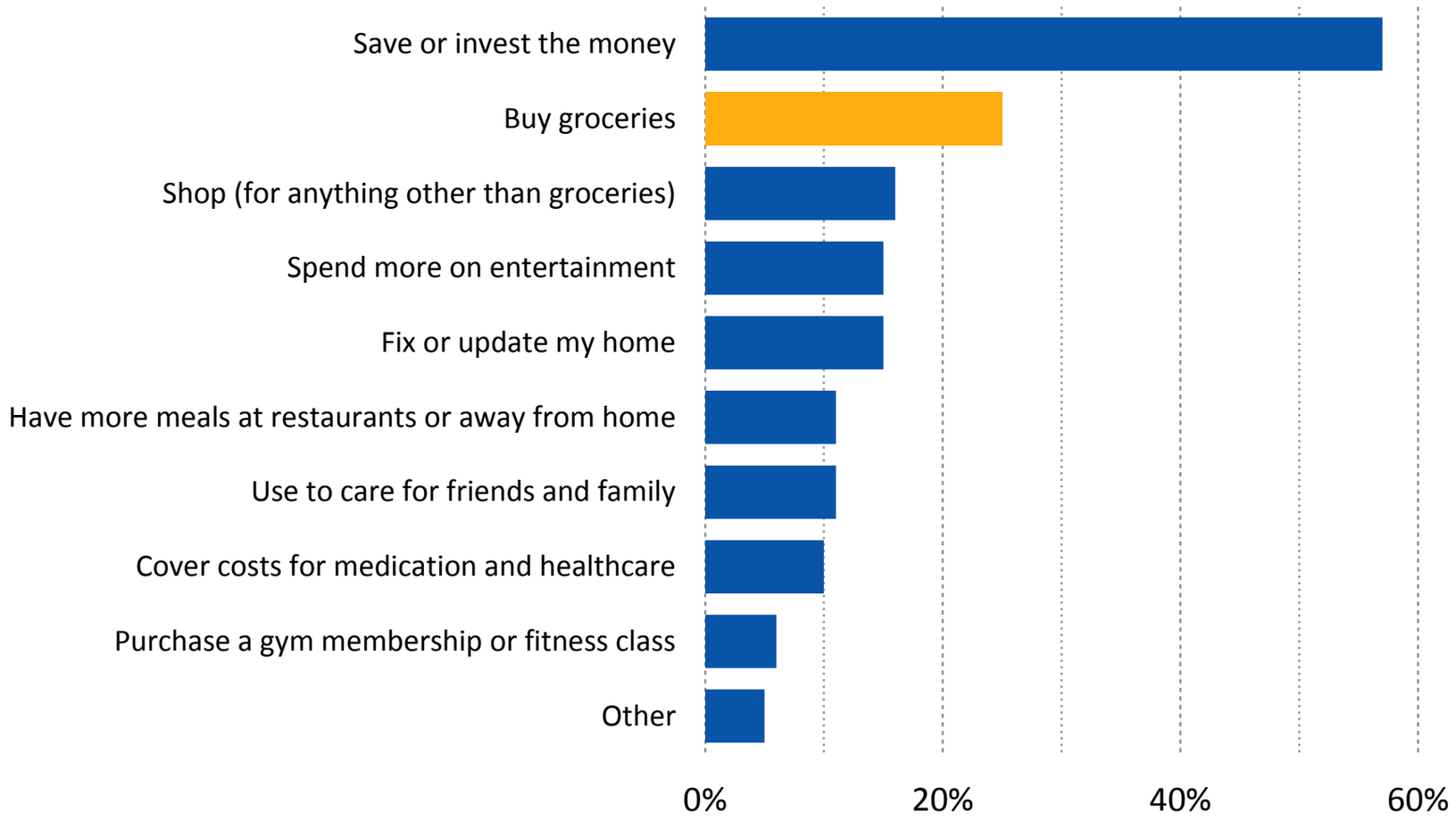
1 in 4 would spend more on groceries, over half would save or invest money

25%

Would prioritize buying groceries

Groups more likely
- Under age 50
- Less educated
- Lower income
- Hispanic
- Has children

How Consumers Would Spend an Extra $100

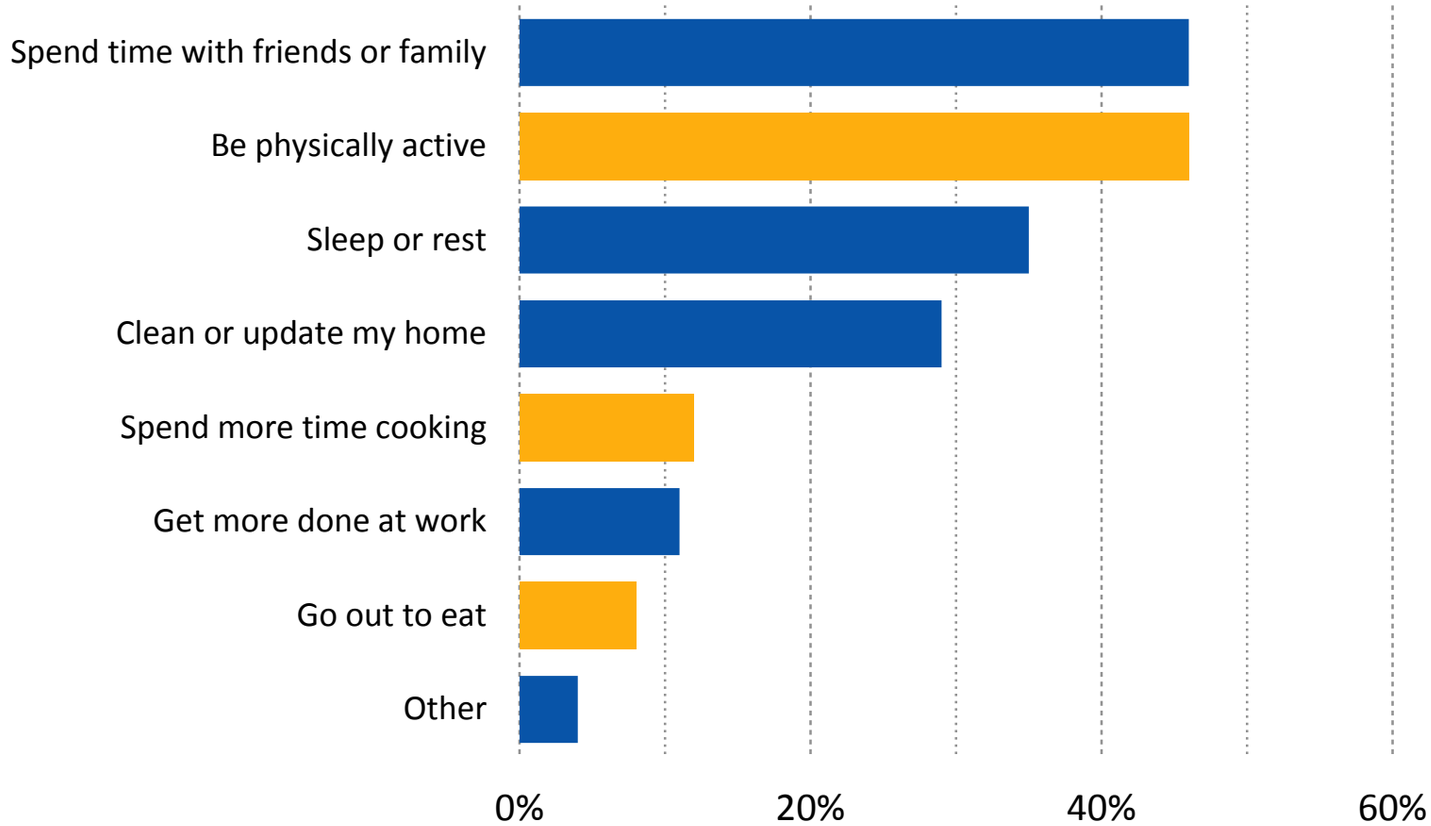


Q: If you had an extra $100 to spend every month, what would you do with that money? Select up to 3 options. (n=1,002)

Americans prioritize time with friends and family

Changes in meal habits, either cooking more or eating out, are not top priorities

How Consumers Would Spend an Extra 4 Hours



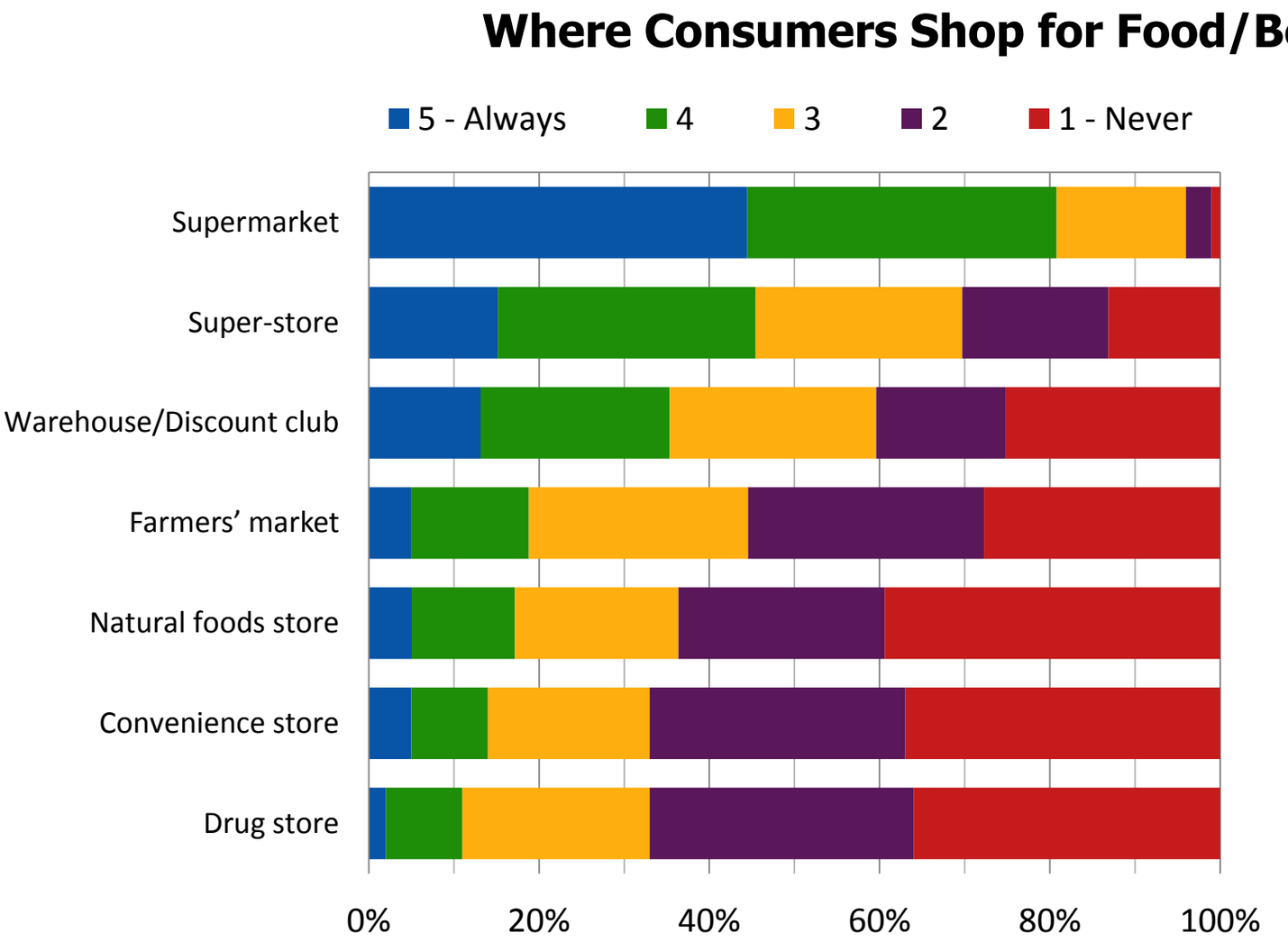
52%

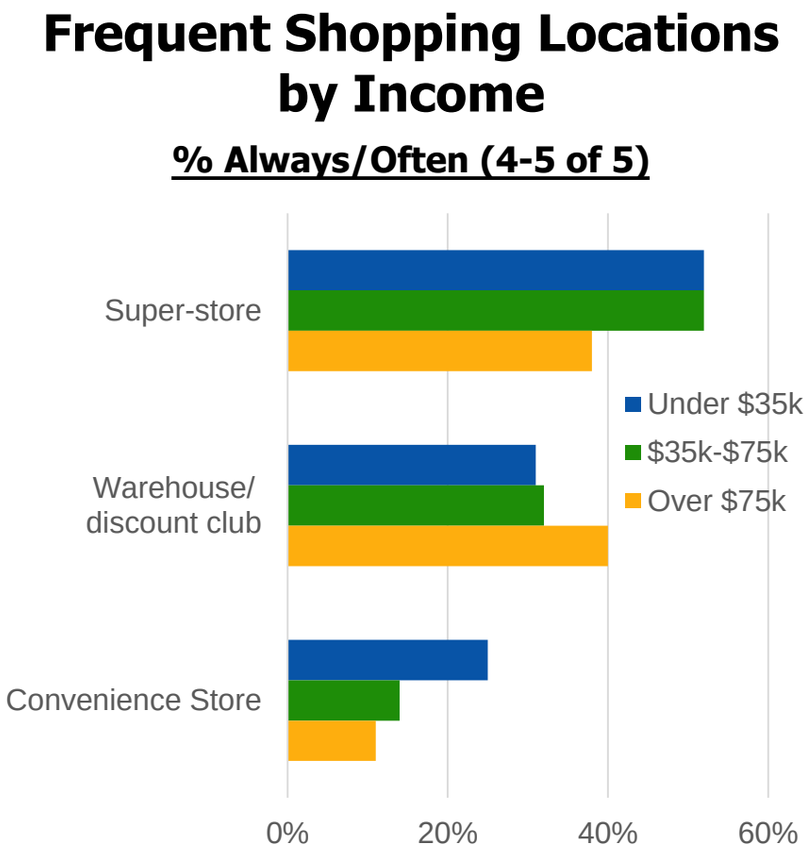
Of consumers in excellent/very good health would spend the time being physically active. Only **38%** of those in fair/poor health say the same.

Q: If you had an extra 4 hours every week, how would you likely spend that time? Select up to 3 options. (n=1,002)

Supermarkets dominate food shopping locations

Super-stores also dominate; natural food, convenience and drug stores are less common

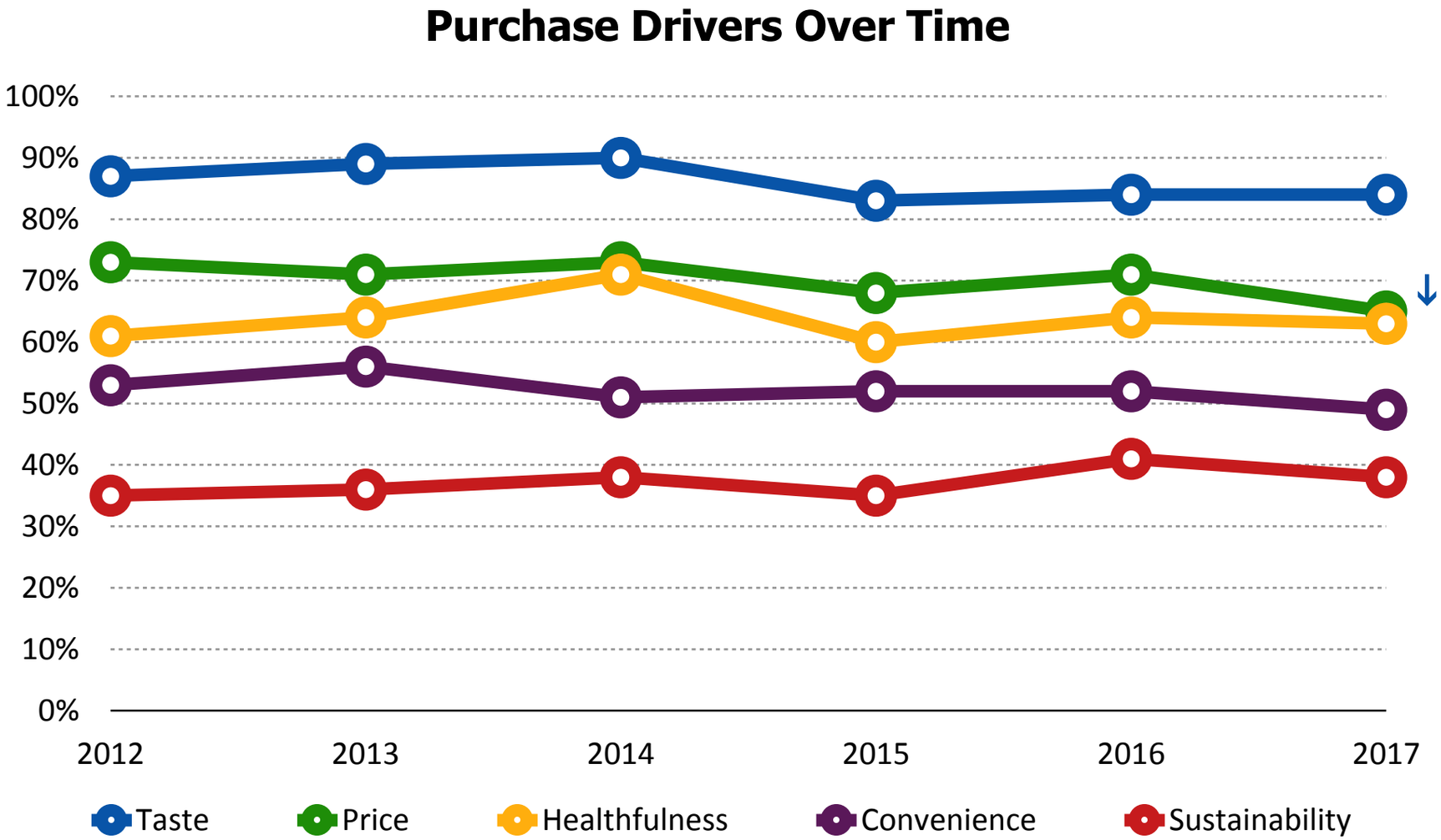




Q: How often do you shop for food and beverages at the following? (n=1,002)

Taste, price, healthfulness reign supreme

Convenience relatively steady with half of consumers stating it as a top driver



84%

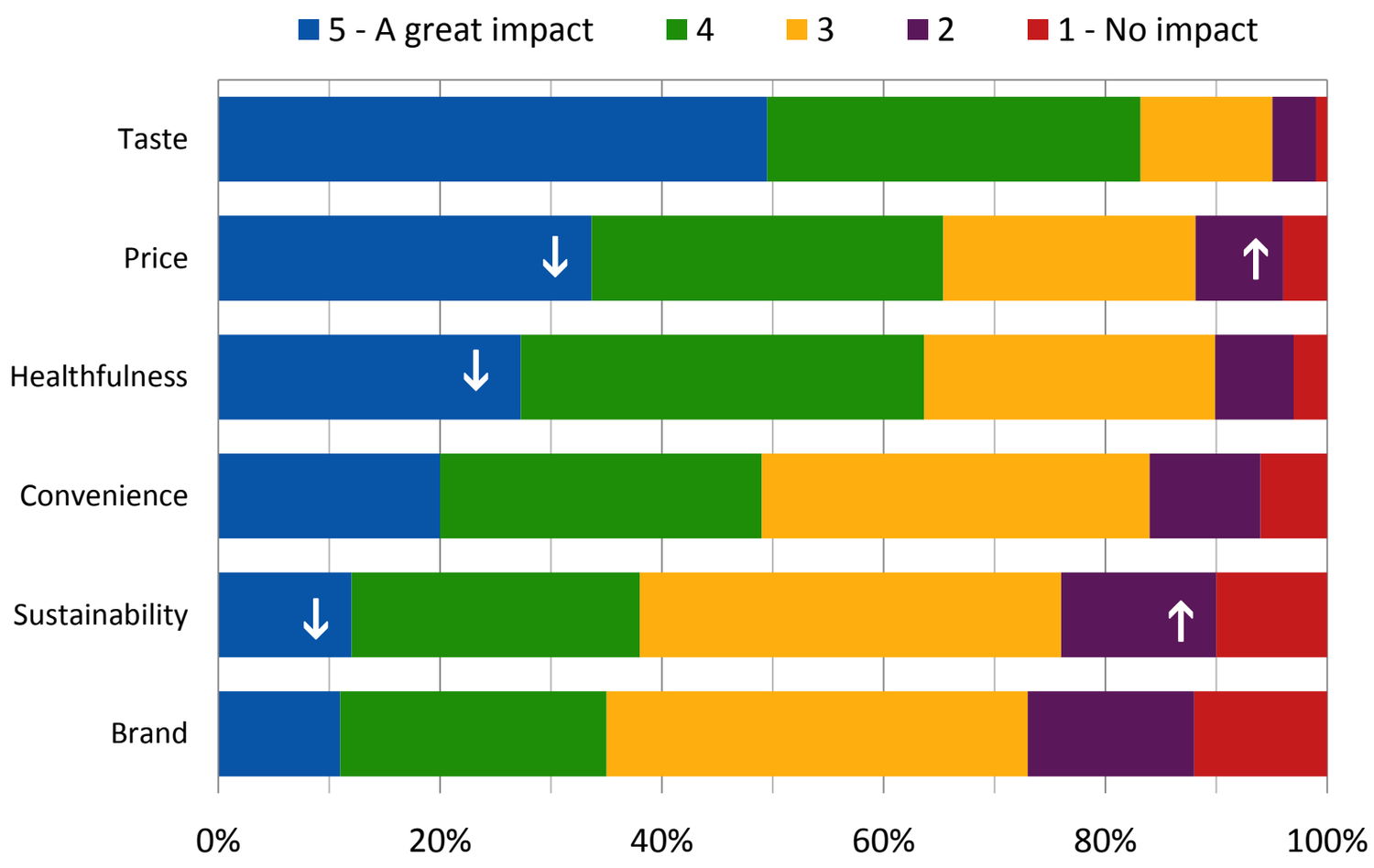
Of consumers say taste is a top (4-5 of 5) driver of purchases. Only 35% say the same for brand

Q: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,002)

Same factors dominate in 2017

Taste, price, healthfulness are top factors; brand was added this year

Drivers of Food/Beverage Purchases



Women are more likely to say that taste, healthfulness, and sustainability matter

55%
Of Millennials say convenience is a top driver

Boomers are more likely to say taste and brand matter

Lower income consumers care more about all factors except for healthfulness and brand

Q: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,002)



THINKING BEYOND THE BOX

When it comes to what Americans' eat and why, considerations go far beyond the factors that traditionally drive purchases - taste, price and convenience. How food is produced, where it comes from, and perceived corporate values have a big impact on food decisions.

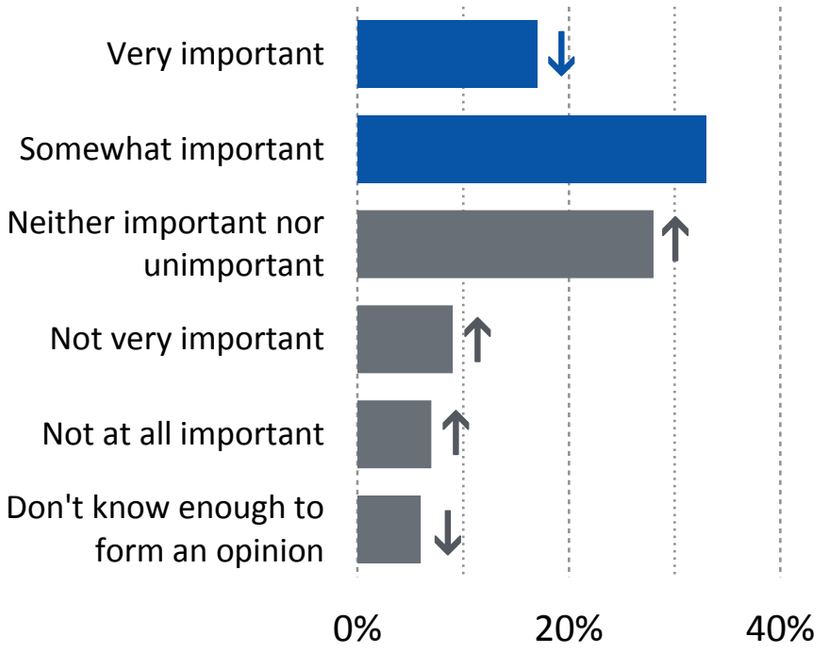
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2017 FOOD & HEALTH SURVEY

Sustainability important for half of consumers

Pesticide use and conserving natural habitat are top concerns related to sustainability

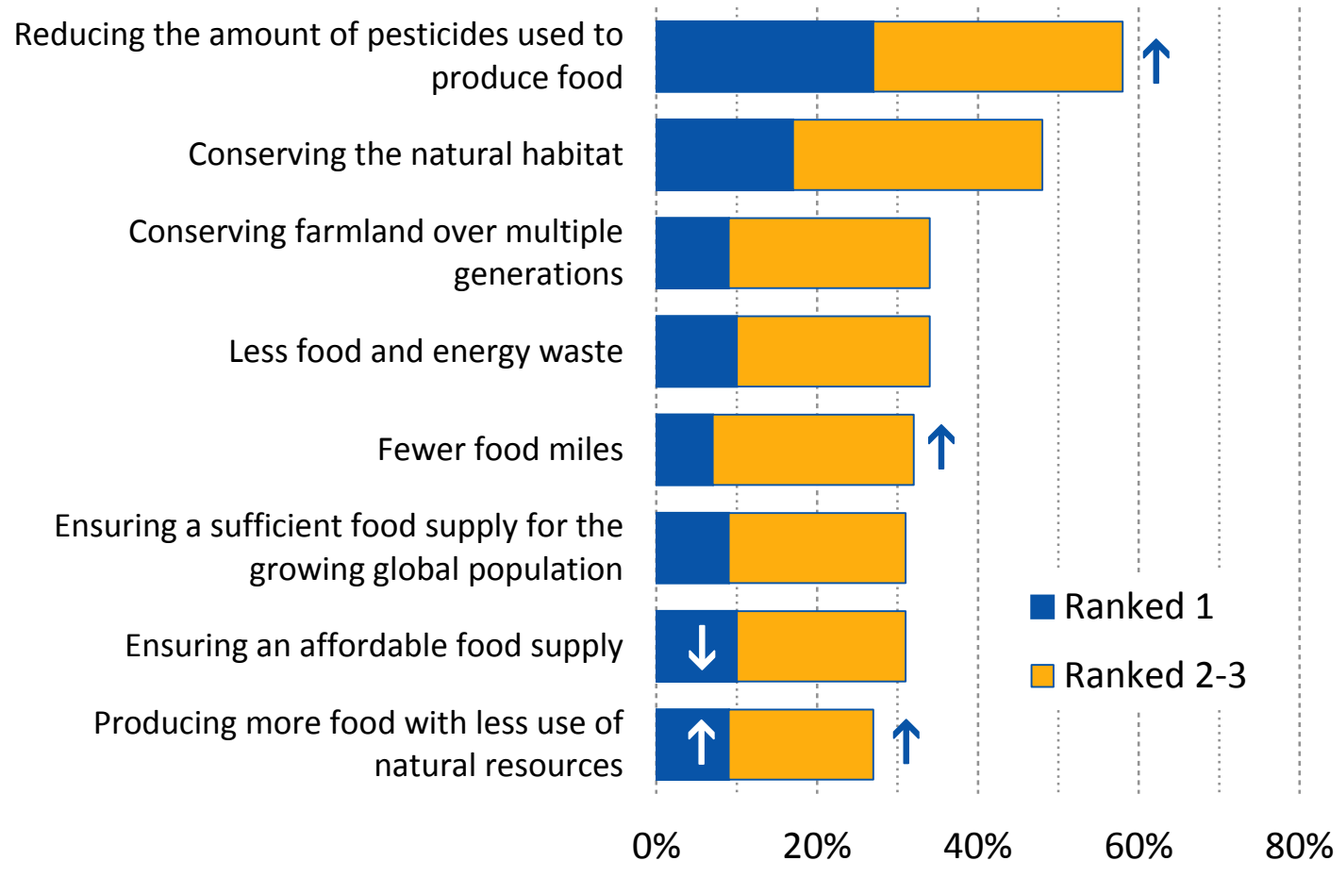
Importance of Food Being Produced in a Sustainable Way



56% of women care about food being produced in a sustainable way, vs. **42%** of men.

Most Important Aspects of Sustainability

(For Those Who See Sustainability as Important)

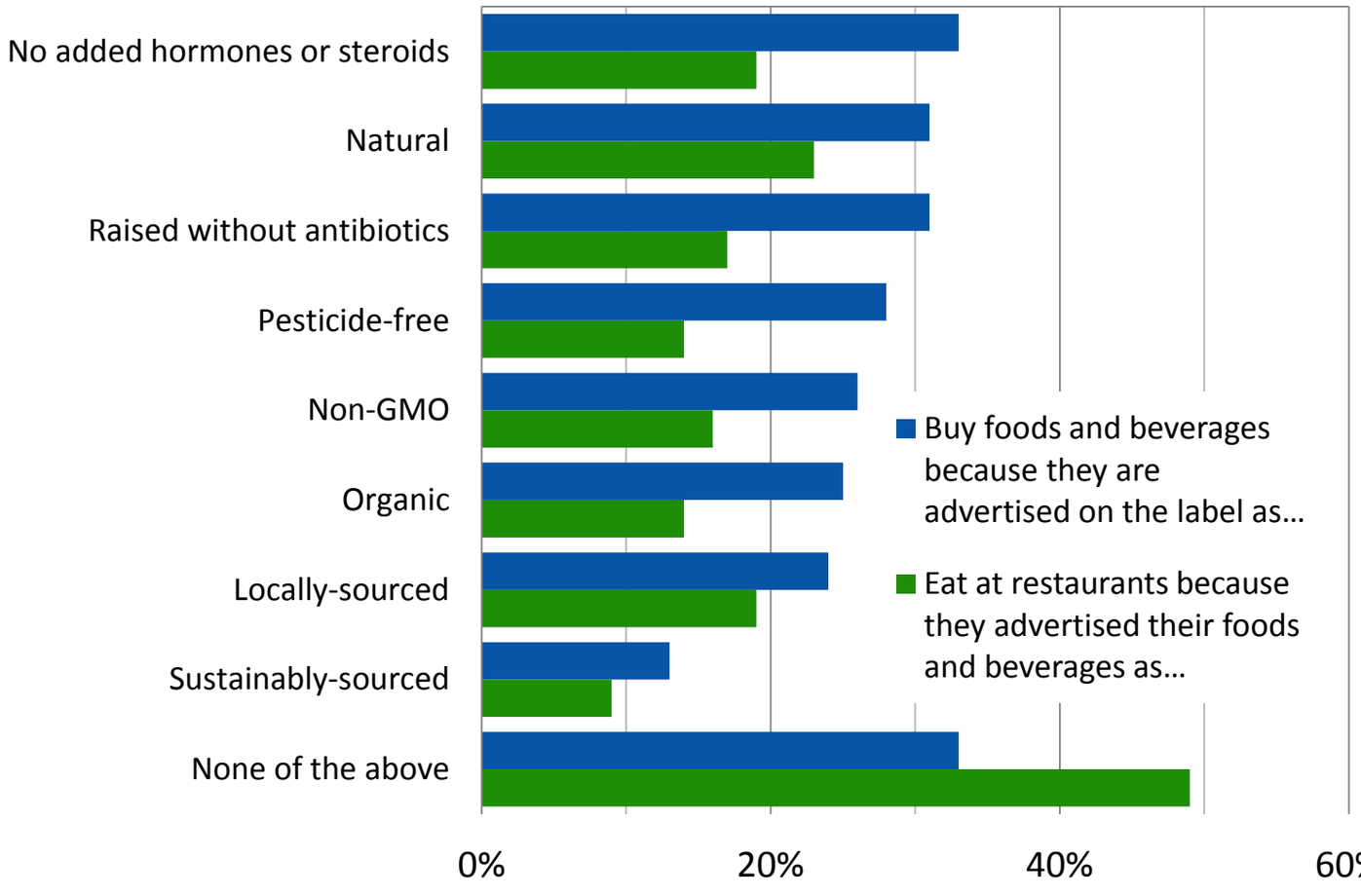


Q: How important is it to you that the food products you purchase or consume are produced in a sustainable way? (n=1,002)
Q: What 3 aspects of producing food in a sustainable way are most important to you? (Sustainability is important, n=527)

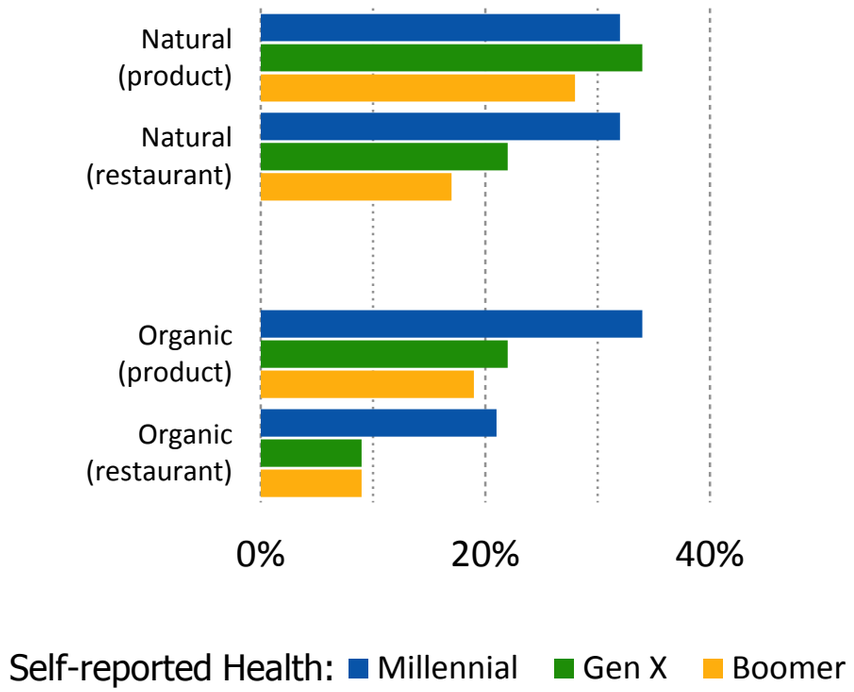
Labels impact product and restaurant choice

"No added hormones" most impactful for products; "natural" most impactful for restaurant choice

Labels Consumers Regularly Seek on Packages/at Restaurants



Natural/Organic Labels by Generation

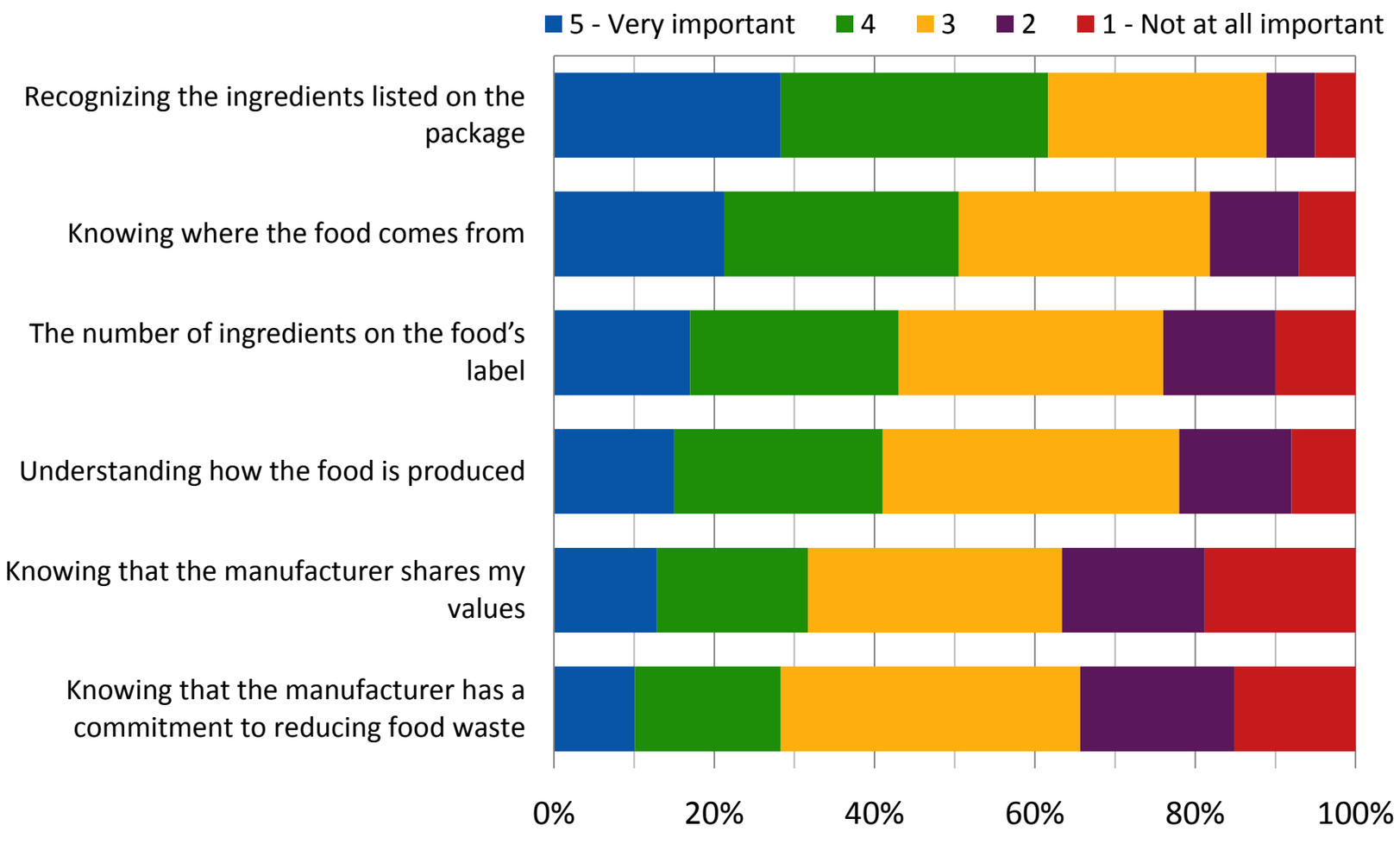


Q: Which of the following, if any, do you do on a regular basis? Select all that apply.
Buy foods and beverages because they are advertised on the label as… (Split sample, n=501); Eat at restaurants because they advertised their foods and beverages as… (Split sample, n=501)

Food production, values impact purchases

One third say it is highly important to know that a company shares their values

Production-Related Purchase Factors



Women are more likely to care about recognizing ingredients, knowing where food comes from, the number of ingredients, and how food is produced

68%

Of Boomers say that recognizing ingredients listed is important, vs. **54%** of Millennials

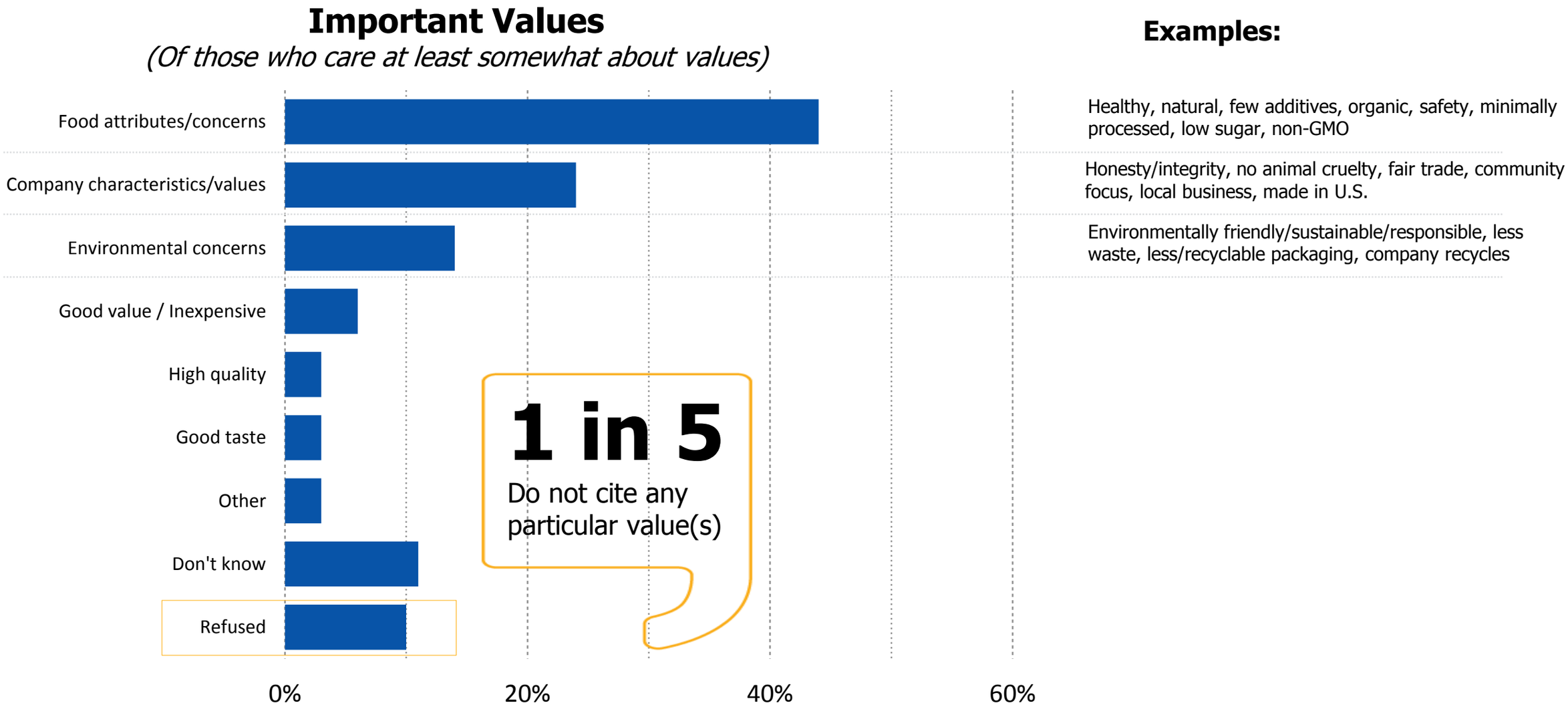
52%

Of lower-income consumers say the number of ingredients listed is important, vs. **40%** of higher-income consumers

Q: How important are the following factors in your decision to purchase a food or beverage? (n=1,002)

Food attributes top list of important values

Characteristics of food manufacturers also top list of important values



Q: You mentioned that you prefer to buy foods and beverages that are produced by companies that share your values. What values are you thinking about specifically? (Cares about shared values, n=654)

Americans split on artificial ingredients

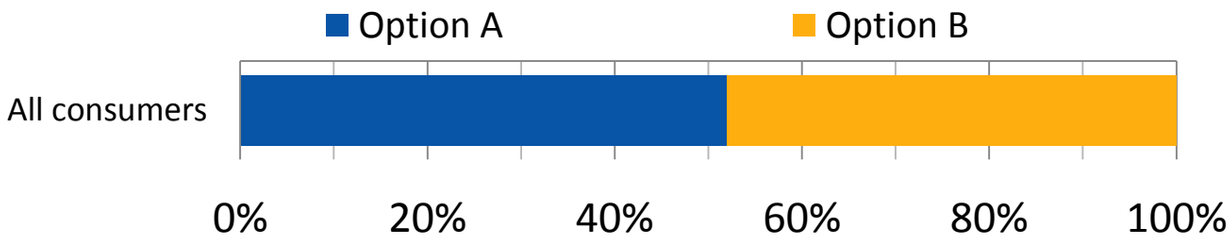
While more men opt for taste, more women favor foods/beverages with no artificial ingredients

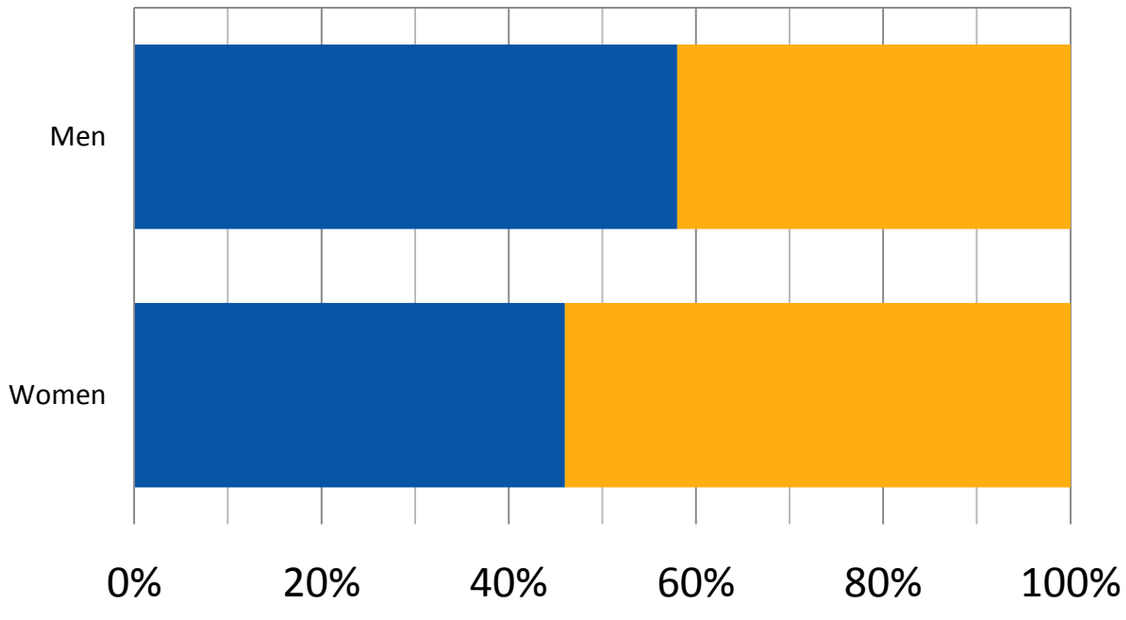
Influence of Artificial Ingredients on Purchasing

Imagine you are going to the store to purchase a food or beverage you like, and you see two different options:

- **Option A** has artificial ingredients like it always has, and you know it tastes great.
- **Option B** has no artificial ingredients, and you know it tastes about half as good as Option A.

The two options are the same in all other ways.
Which would you choose?



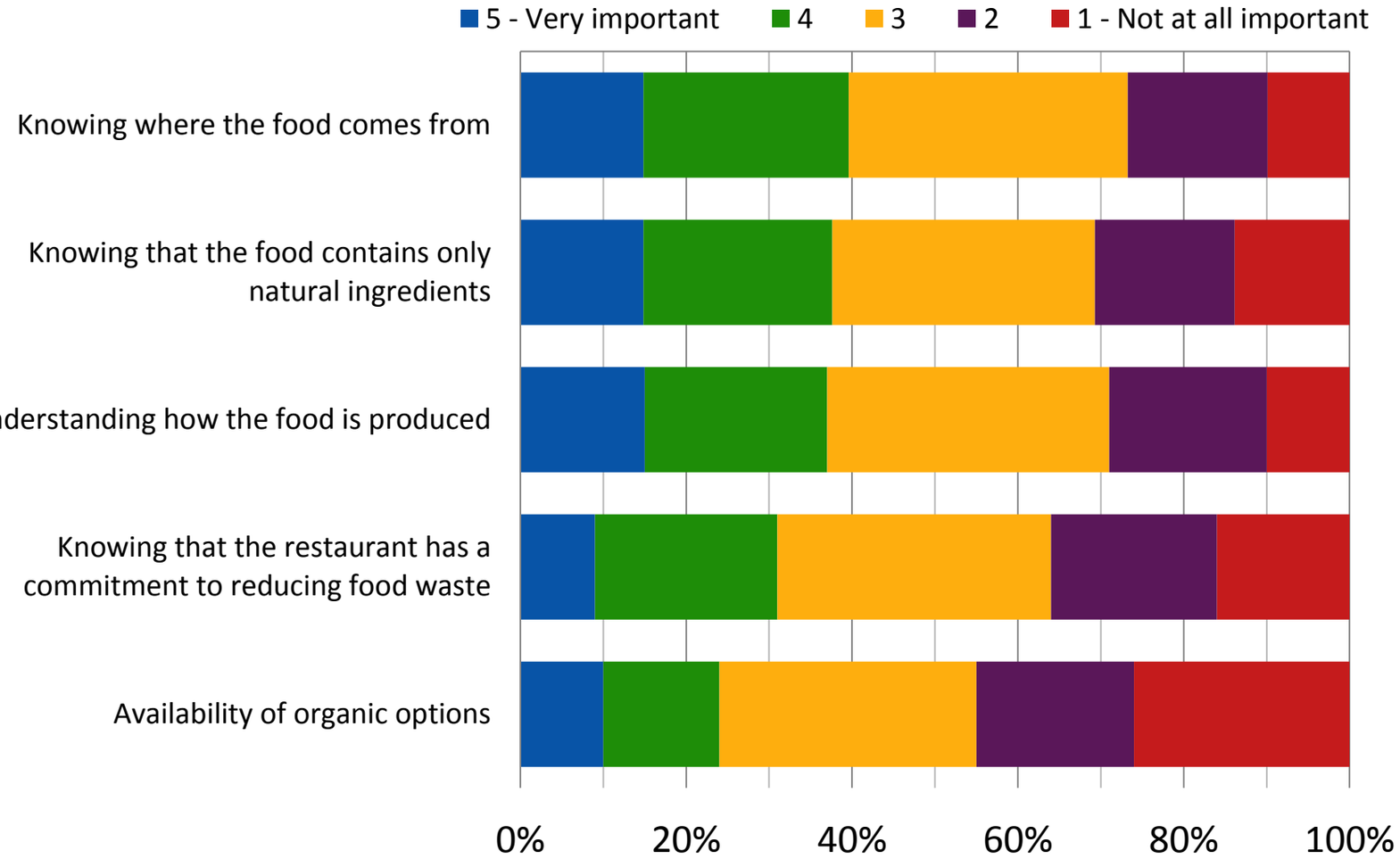


Q: Imagine you are going to the store to purchase a food or beverage you like, and you see two different options: Option A has artificial ingredients like it always has, and you know it tastes great. Option B has no artificial ingredients, and you know it tastes about half as good as Option A. The two options are the same in all other ways. Which would you choose? (n=1,002)

Several factors impact restaurant choice

About 4 in 10 say knowing where food comes from, natural ingredients, and production important

Factors When Choosing Where to Eat Out



Women care more about all issues, except the availability of organic options

60%

Of those who regularly use nutrition info when eating out say it is important to know that the food contains only natural ingredients

This group unsurprisingly cares more about all of these factors

49%

Of those with children say it is important to know where food comes from when eating out, vs. **37%** of those without kids

Q: How important are the following factors when it comes to choosing a restaurant or cafeteria? (Split sample, n=503)



THINKING BEYOND THE BOX:

FOOD CONFIDENCE & CONCERNS

Americans' food values are also reflected in their perceptions of the food supply and their food safety concerns.

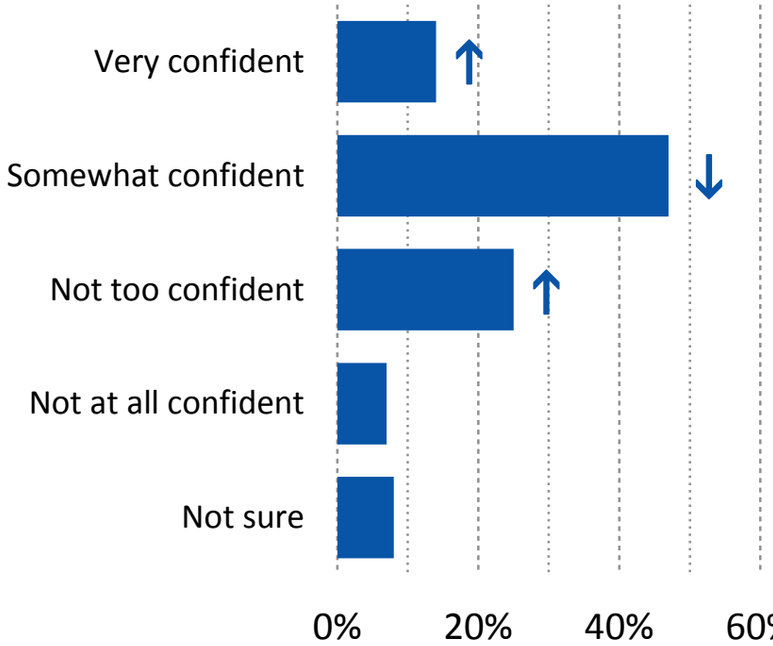
INTERNATIONAL FOOD INFORMATION COUNCIL FOUNDATION

2017 FOOD & HEALTH SURVEY

Confidence in food supply down slightly

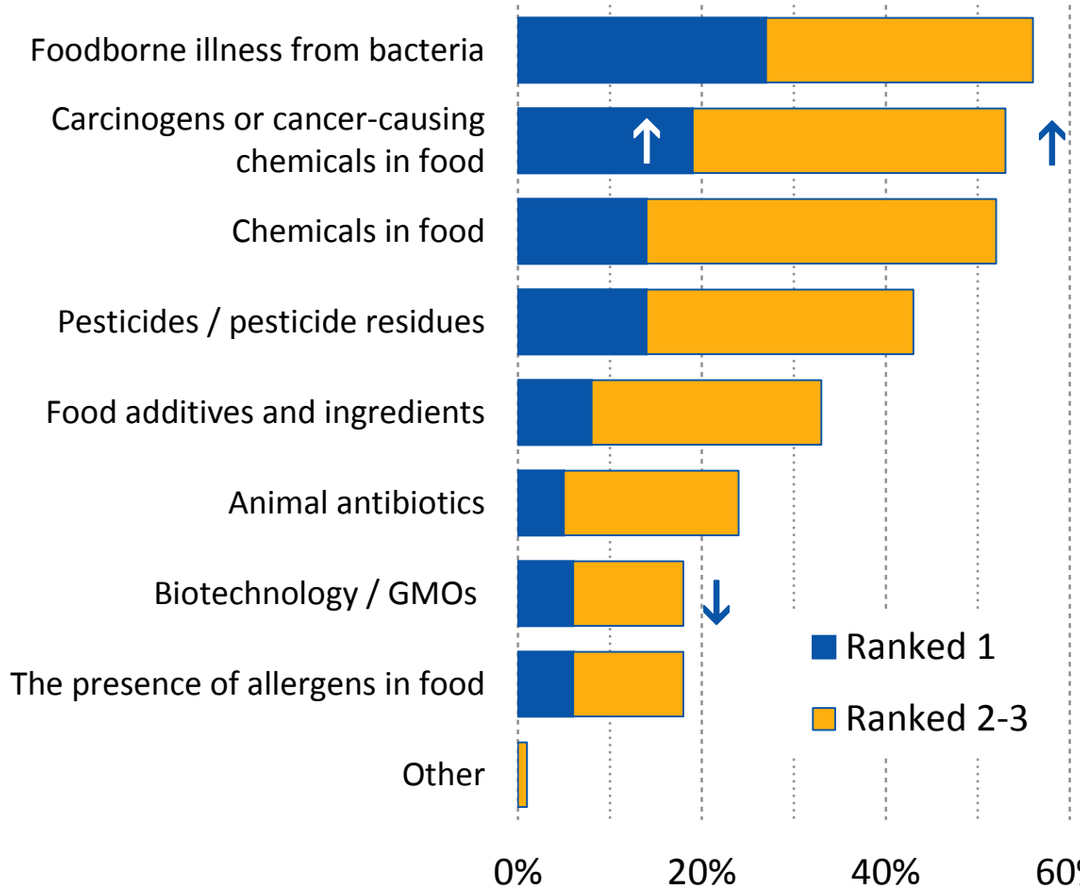
Foodborne illness remains top safety concern, but concern about carcinogens on the rise

Confidence in Safety of U.S. Food Supply



35%
Of Millennials are not confident, vs. **24%** of Boomers

Most Important Food Safety Issues Today



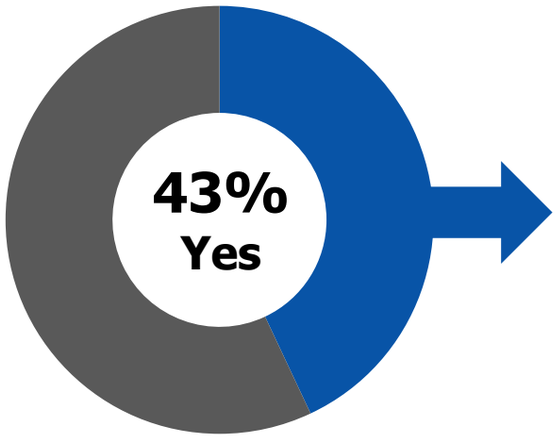
56%
Of those who say there is a lot of conflicting information about what foods to eat/avoid say carcinogens is a top 3 issue, vs. **45%** of those who do not see conflicting info

Q: Overall, how confident are you in the safety of the U.S. food supply? (n=1,002)
Q: What in your opinion are the three most important food safety issues today? (n=1,002)

Food safety concerns alter eating habits

Foodborne illness and carcinogens driving changed eating habits

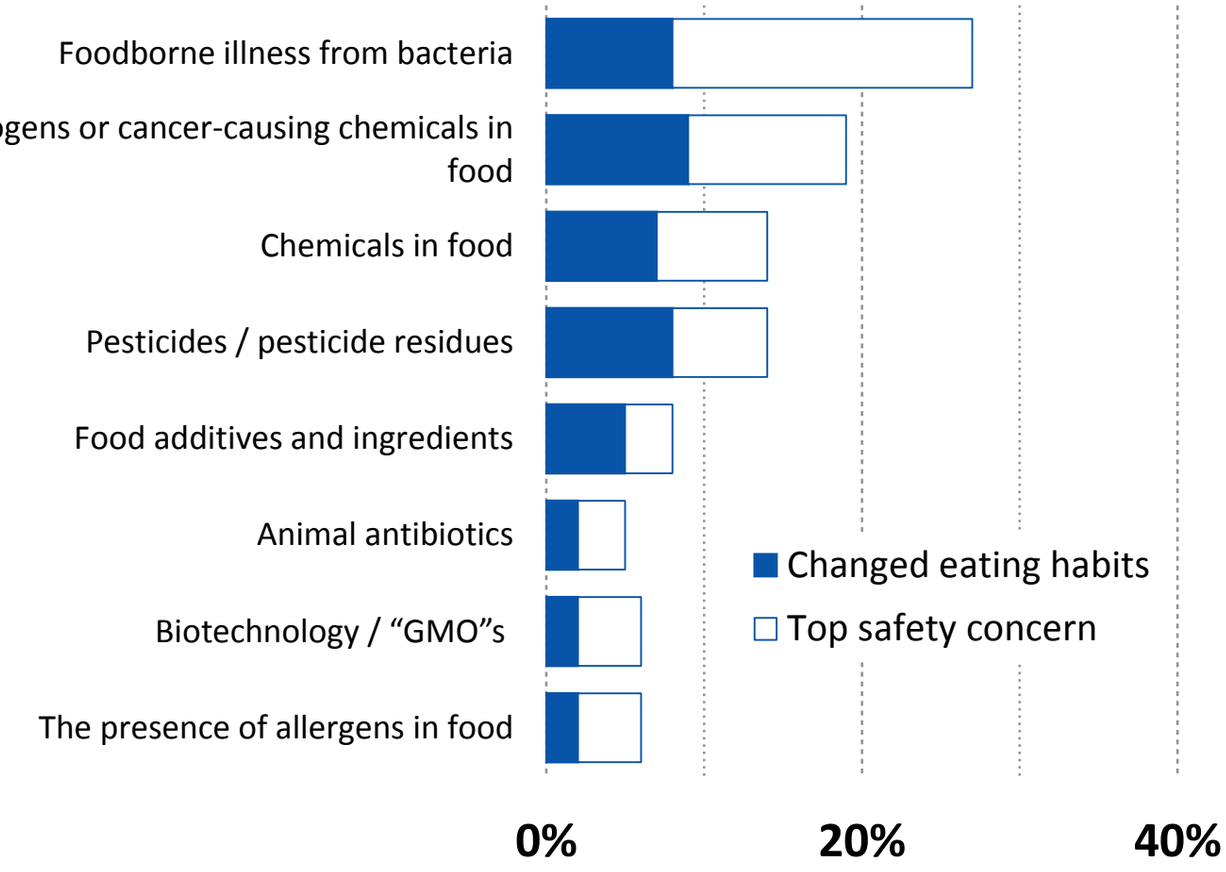
Changed Eating Habits Due to Concerns about Top Safety Issue



58%
Of those not confident in the food supply made a change because of a safety issue, vs. **38%** of those who are confident

55%
Of those with a high level of trust in the news made a change because of a safety issue, vs. **36%** of those with low trust

Changed Habits by the Concern Driving the Change

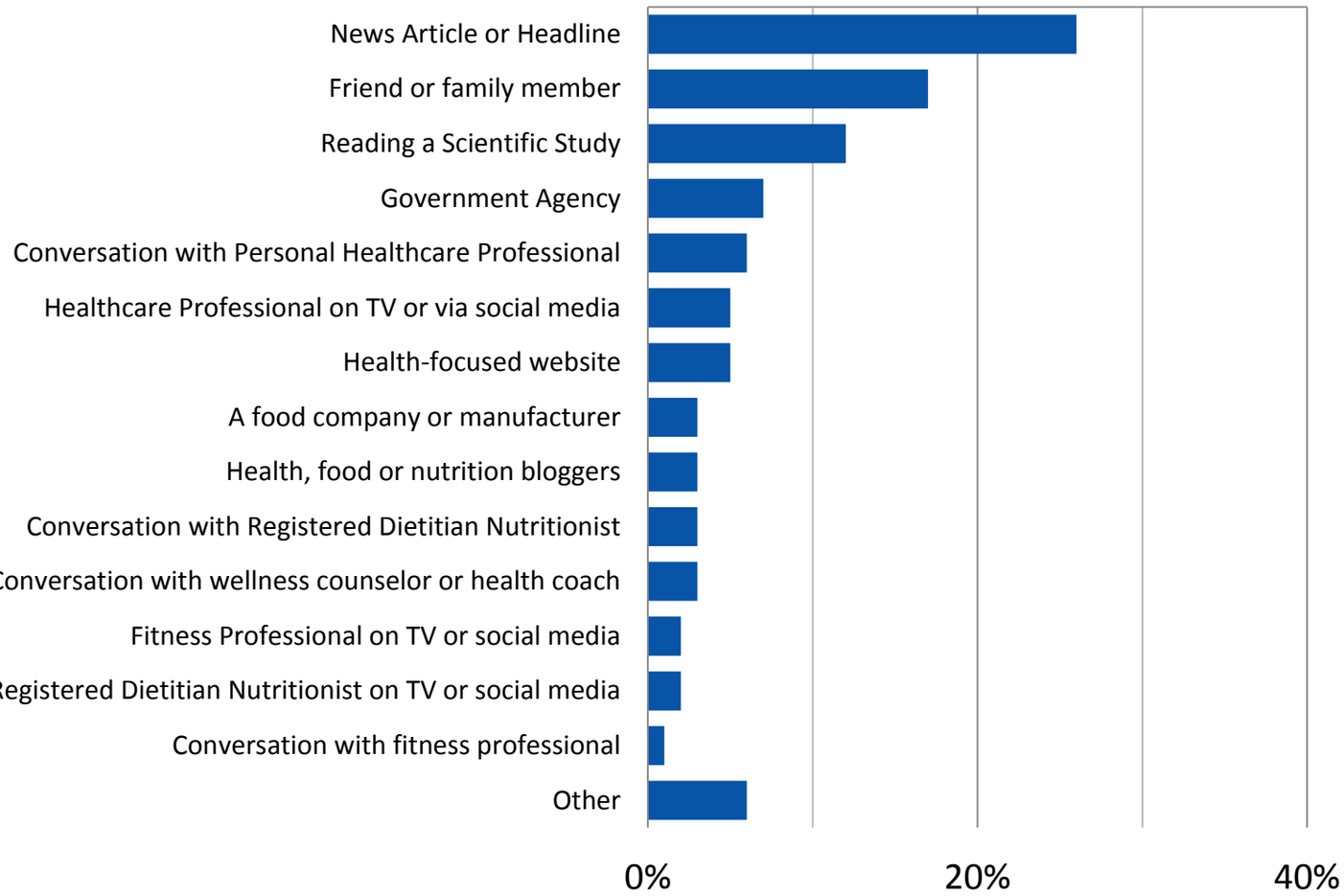


Q: Have you changed your eating habits due to concerns about [your top safety concern]? (n=1,002)

News, family and friends influence safety concerns

These are top sources for all concerns, except GMOs (scientific study)

Top Source of Influence on Opinion about Top Safety Concern



Top Concern	#1 Source	#2 Source	#3 Source
Foodborne illness	News article or headline **36%**	Friend or family **17%**	Government agency **8%**
Carcinogens	News article or headline **31%**	Reading a scientific study **17%**	Friend or family **13%**
Chemicals in food	News article or headline **24%**	Friend or family **20%**	Reading a scientific study **10%**
Pesticides	News article or headline **22%**	Friend or family **18%**	Reading a scientific study **11%**
Food additives/ ingredients	Friend or family **21%**	News article or headline **17%**	Reading a scientific study **15%**
Animal antibiotics	News article or headline **18%**	Friend or family **18%**	Reading a scientific study **13%**
Biotech/GMOs	Reading a scientific study **25%**	News article or headline **21%**	Wellness counselor **11%**
Allergens	Friend or family **24%**	Personal health prof. **14%**	Government agency **9%**

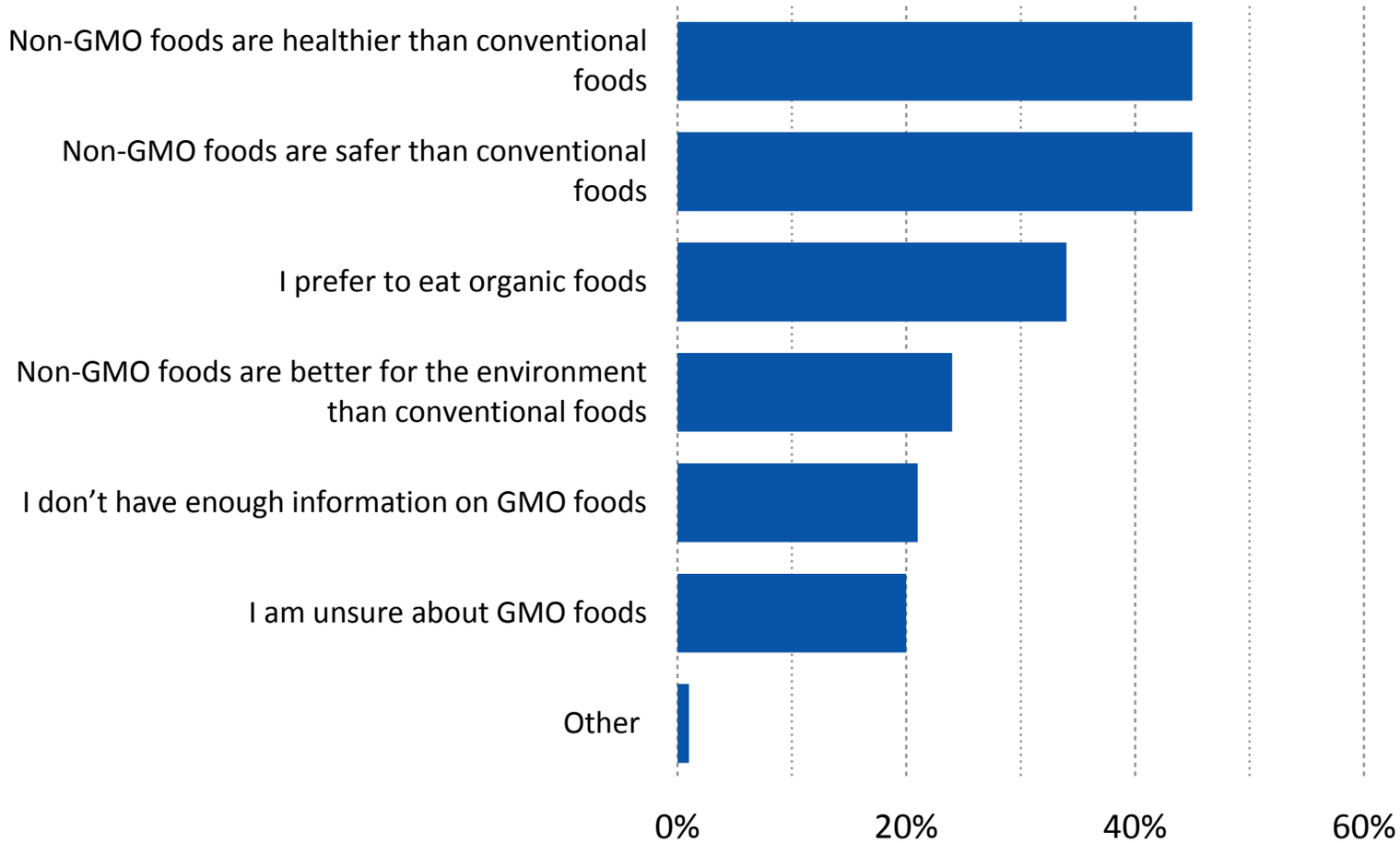
Q: What one source of information most influenced your opinion on [your top safety concern]? (n=1,002)

Healthfulness and safety top GMO concerns

1 in 5 who seek non-GMO labels say they don't have enough information on GMO foods

Why Some Consumers Seek Non-GMO Labels

(Of those who seek on products or when eating out)



73%

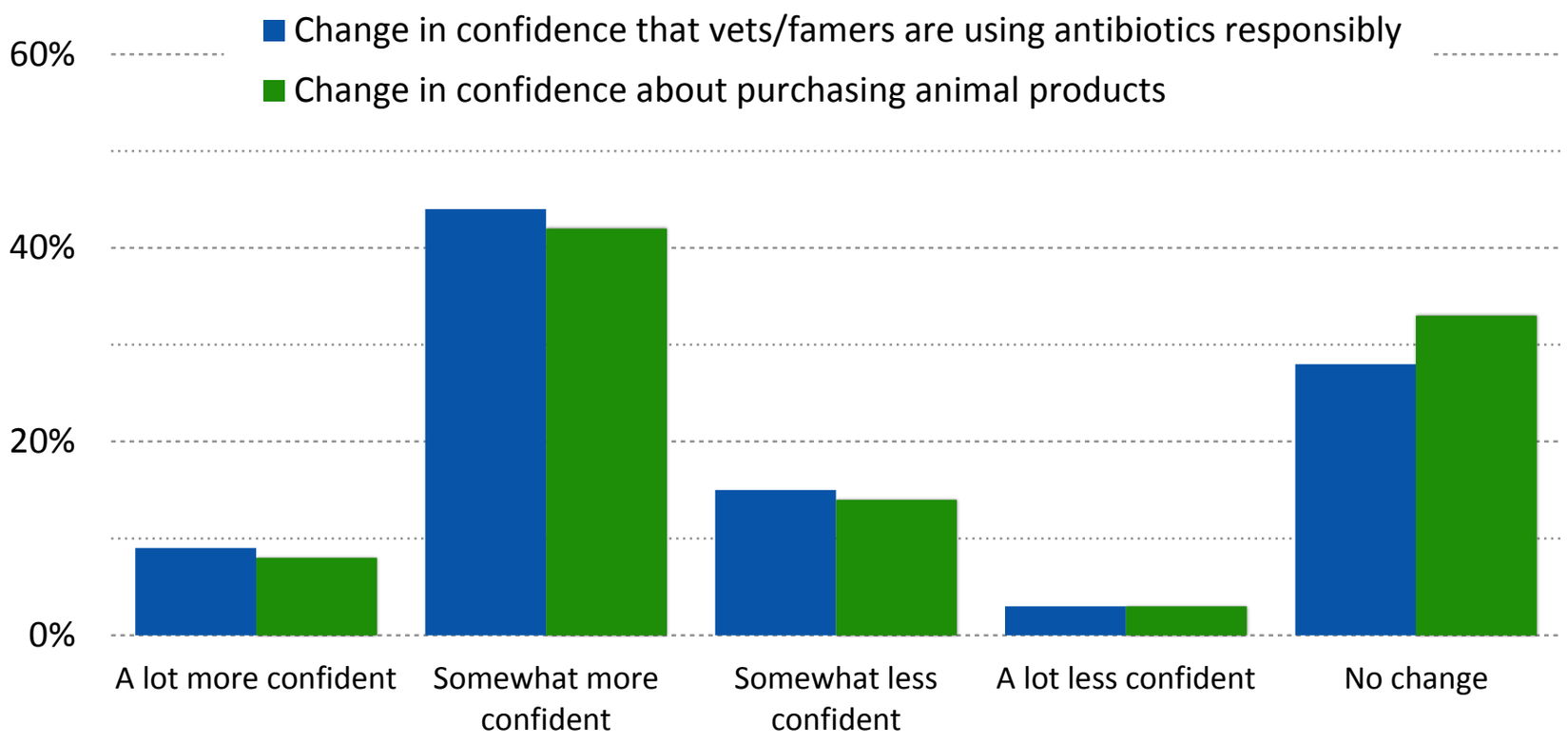
Seek non-GMO labels because they believe these foods are either healthier, safer, or better for the environment

Q: Which of the following are reasons why you choose to purchase foods that are labeled as "Non-GMO"? Select all that apply.. (Buys food or eats at restaurants that are non-GMO, n=207)

Knowledge of FDA's antibiotic rule increases confidence

Nearly half report increase in confidence for responsible use and purchasing animal products

Change in Confidence Due to FDA Prohibition of Growth-Promotion Uses of Antibiotics



43%

Of those who are not confident about the U.S. food supply say that this change makes them more confident antibiotics are being used responsibly and **38%** are more confident about purchasing animal products

Q: The US Food and Drug Administration recently prohibited growth-promotion uses of antibiotics and now only allows antibiotics to fight illness in animals producing food…
How does this change impact your level of confidence that veterinarians and farmers are using antibiotics responsibly? (n=1,002)
How does this change impact your level of confidence in purchasing meat, poultry, egg, and milk products? (n=1,002)



For more information on the

2017 Food and Health Survey

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