INTERNATIONAL FOOD INFORMATION COUNCIL FOUNDATION

American Heart Association.

Food Labeling Survey

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January 2019

Introduction

Research Objective

- Understand consumer attitudes towards healthy labels and different food packaging aspects that drive purchase behavior.

Sampling

✓ Research Now Online Panel

✓ Sample size

- 1,017 total US consumer respondents
- Representative distribution by region, gender, age, race/ethnicity and household income

Methodology

✓ Survey Conducted

- October 16-26, 2018

✓ **Average Length of Survey**

- 7 ½ minutes

✓ **Qualification Criteria**

- Age 18-80
- Sole or shared responsibility for household's grocery shopping

SUMMARY & CONCLUSIONS

Although they usually read food packaging labels, consumers sometimes find it difficult to identify healthy food options.

<u>Most consumers look for healthy options when food shopping.</u>

- Two in five (43%) “always” look for healthy options and half (52%) “sometimes” do. Only 5% of surveyed consumers “never” look for healthy options.
- However, finding healthy foods is “difficult” for one in ten consumers (11%); only 28% claim that this is “easy”.

<u>Package labeling is a primary source of healthfulness information.</u>

- A majority say they <u>always</u> read labels on a packaged food before buying it for the first time (59% high agreement).
- The Nutrition Facts panel (69%) and the ingredient list (67%) are the two places where the most consumers look for information about food healthfulness.
- Typically, a consumer will look at these labels to determine whether a packaged food has ingredients that they want (45% looked for first) or don’t want (31% looked for first).

SUMMARY & CONCLUSIONS

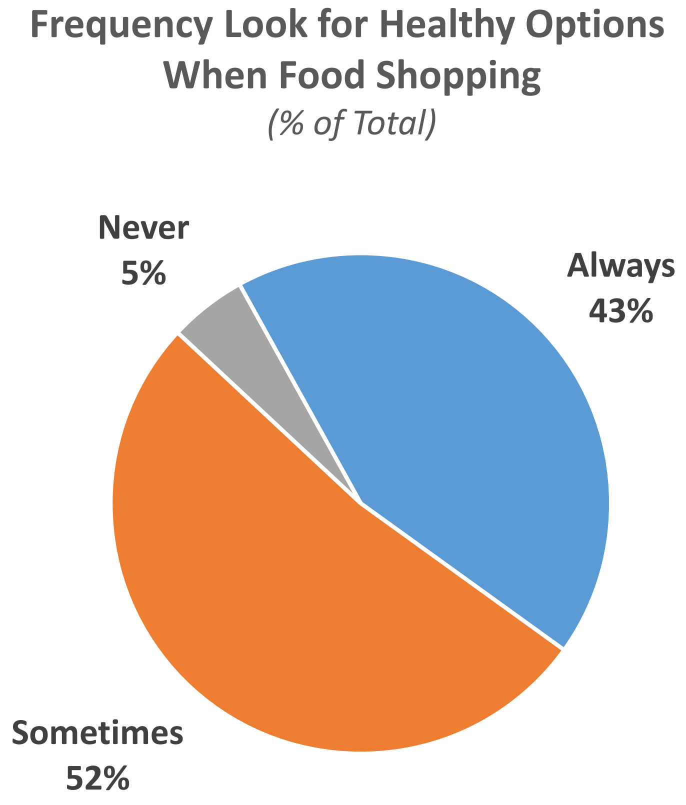
While consumers currently use package information to make decisions about purchasing healthy foods, additional information in the form of a symbol or image would be helpful and would impact purchases.

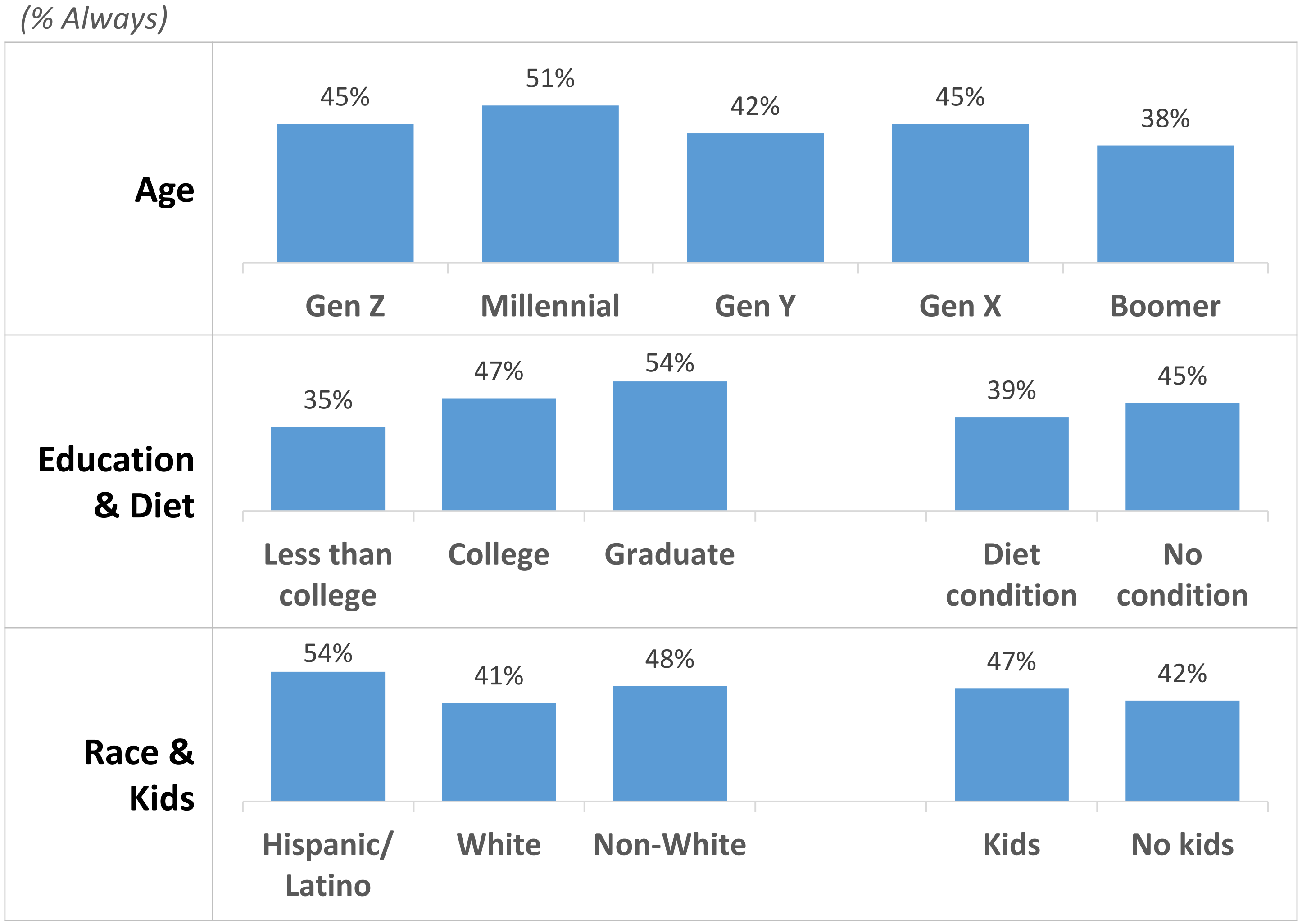
<u>Package symbols and icons are already being used by consumers to make healthy food purchase decisions, but consumers would be likely to use additional information if provided.</u>

- In addition to the Nutrition Facts panel and ingredient list, half of the surveyed consumers frequently check front-of-package nutrition content icons like the Facts Up Front label, Whole Grain stamp, Heart-Check symbol and Great For You symbol (48%).
- Furthermore, a healthy symbol on a food package would have a strong influence on a consumer's purchase decision. A healthy symbol is ranked third in terms of overall impact, following the taste and price of a food item.
- Consumers agree that a symbol indicating whether a food is healthy would be very helpful (54%) and would make them more likely to purchase a product (45%).

Shopping for Healthy Food

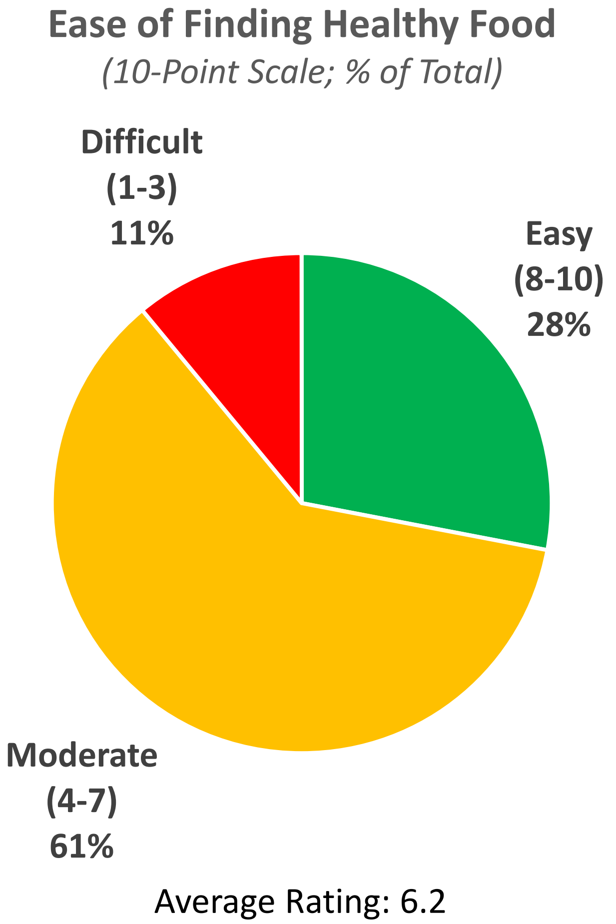
Nearly all surveyed consumers look for healthy options when shopping - at least some of the time. This behavior is more common among younger, highly educated consumers and those with children in the household.

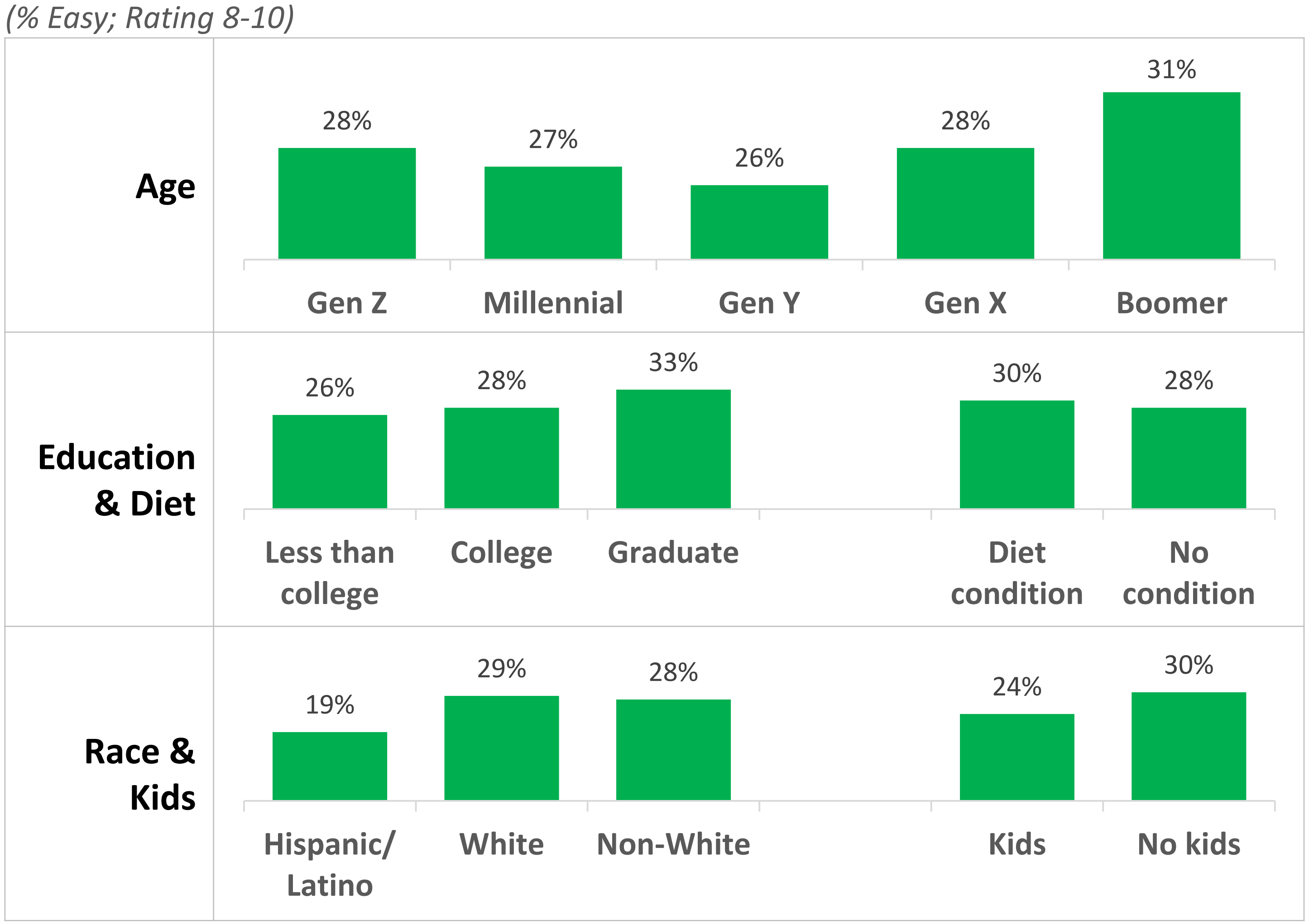




Q9. When shopping for food for your household, how often do you look for healthy options?
Base=Total Respondents; n=1017
Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

Finding healthy food is only moderately easy for most consumers. Those who are older, highly educated and without children find this easier than others.

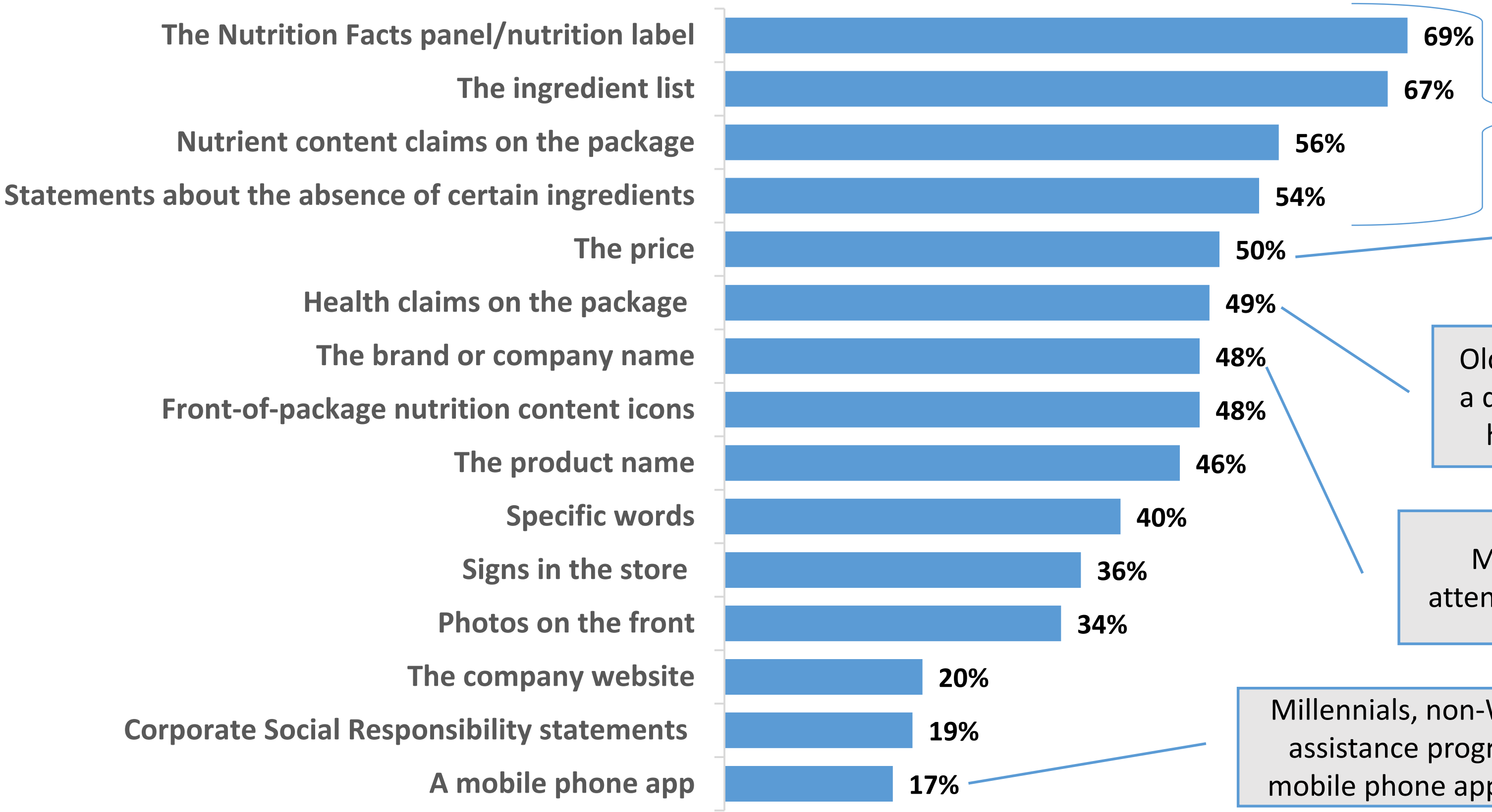




Q10. Please indicate how easy or difficult it is to know which foods are healthy when food shopping.
Base=Total Respondents; n=1017
Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

When shopping, most consumers look at the nutrition label and ingredient list for information about the healthfulness of food items.

Where Consumer Looks
for Information about Food Healthfulness
(% Rating 4-5 on 5-Point Scale; 5=Always)



Compared to other consumers, the top four information sources are referenced by more older and highly-educated consumers as well as those with children and with a diet-related condition.

The price is an indicator of healthy foods to more younger consumers with children and those who are on a food assistance program compared to other consumers.

Older, high-income consumers and those with a diet-related condition pay more attention to health claims on the package than others.

More consumers with high incomes and high education levels pay attention to brands or company names when determining healthfulness.

Millennials, non-Whites, those with children and those on food assistance programs are more likely than others to refer to a mobile phone app when determining a product's healthfulness.

Q11. When looking for healthy packaged foods while shopping, how frequently do you use each of the following in determining a product's healthfulness?
Base=Look for healthy options when shopping; n=971

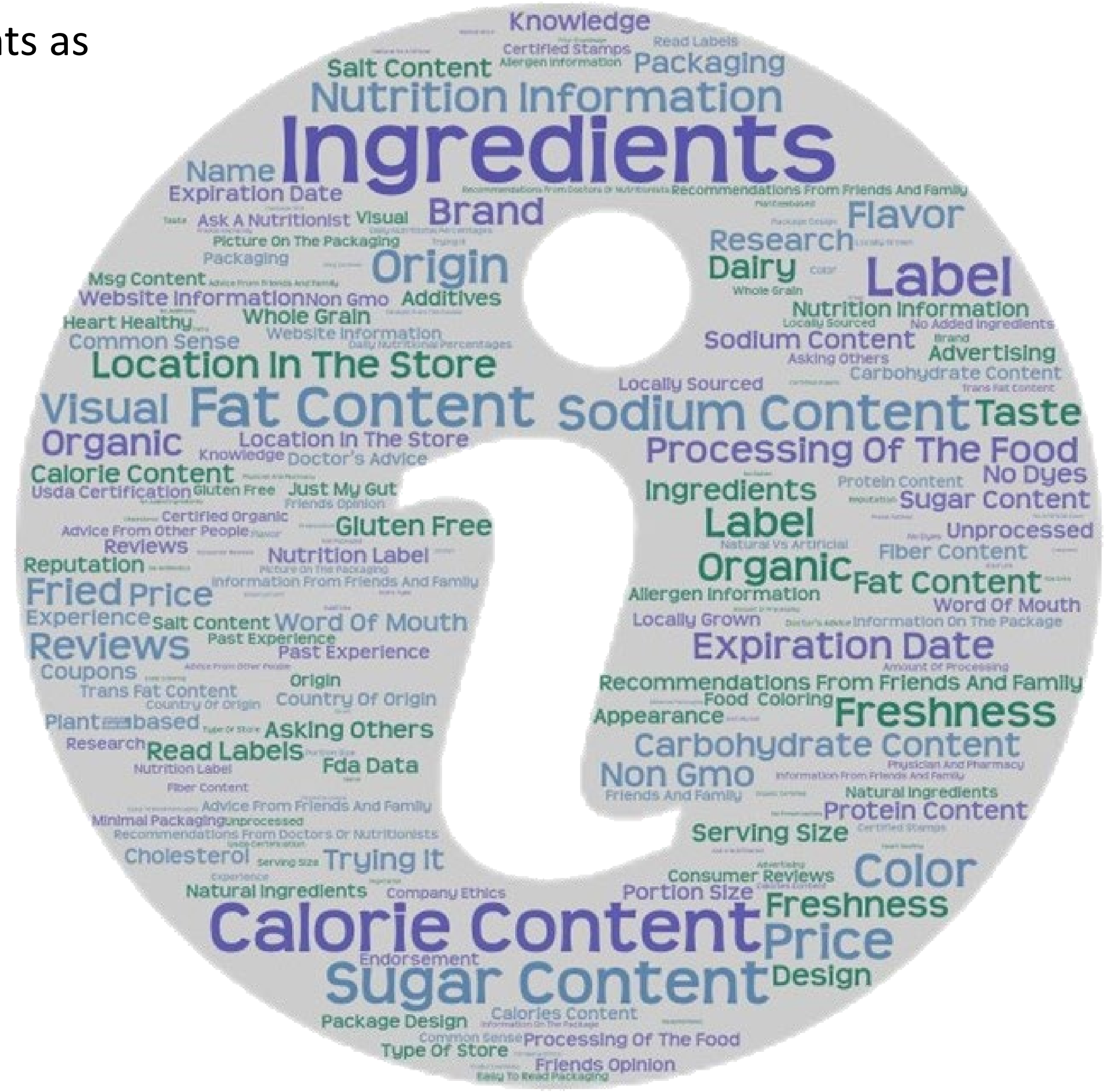
Consumers typically read the label for a food’s ingredients as well as the inclusion of sugar, fat and sodium.

Other Information that Consumers Look for to Determine a Food Product’s Healthfulness

(Summarized from Open-Ended Responses)

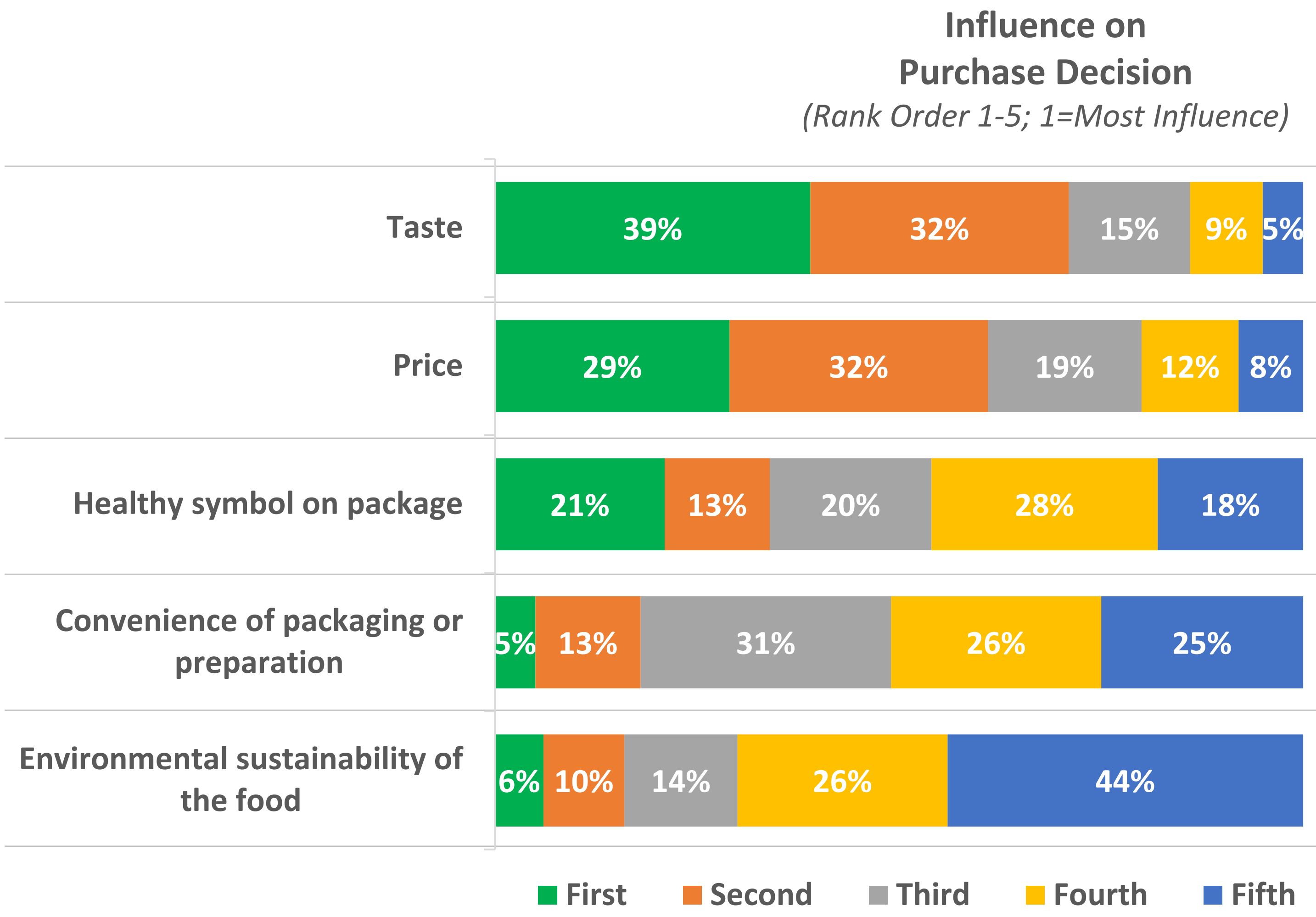
Most frequently mentioned words:

- Ingredients
- Calorie content
- Sugar content
- Fat content
- Sodium content
- Nutrition information
- Freshness
- Label
- Organic



Healthy Food Packaging

Overall, taste is the primary consideration when making a food purchase, followed by price. The healthy symbol ranks third following these two primary factors.



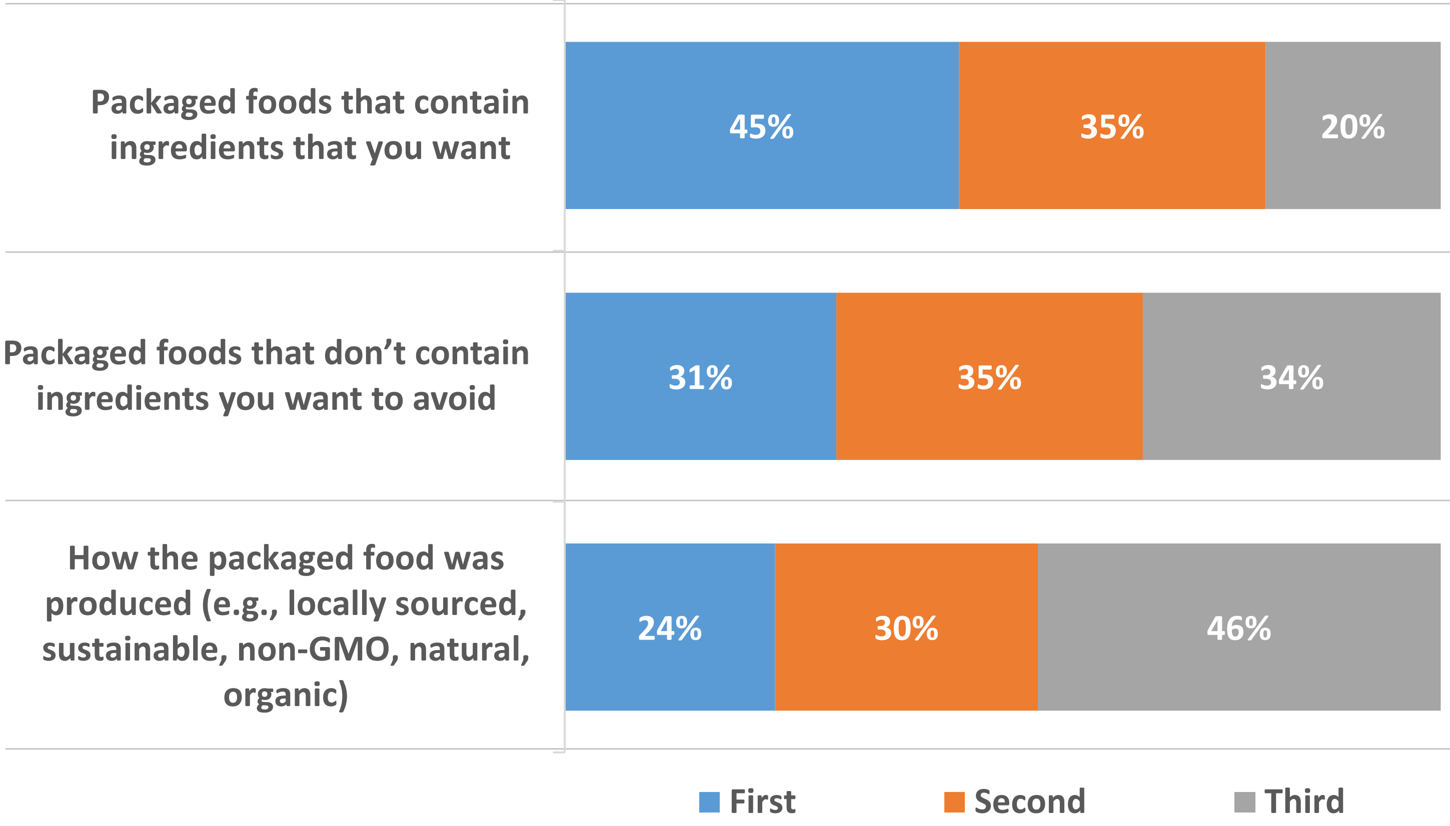
	Average Rank	
Taste	2.1	Highly educated and older consumers are more influenced by taste.
Price	2.4	Price has more of an impact on younger consumers, those with low incomes and those on food assistance.
Healthy symbol on package	3.1	Healthy shoppers, those with high incomes and those with a diet-related condition are more influenced by this symbol.
Convenience of packaging or preparation	3.5	Convenience is more of a factor for Millennials and consumers with children.
Environmental sustainability of the food	3.9	Gen Z's, those in the western US and those with lower incomes are most influenced by sustainability.

Q15. Please rank order the following five items in terms of how much influence each would have on your decision to purchase a particular packaged food product.
Base=Total Respondents; n=1017

Generally, consumers look for certain ingredients in food that they purchase rather than making sure foods don't contain certain ingredients.

What Tells Consumer that Food is Healthy

(Rank order 1-3; 1=Look for First)



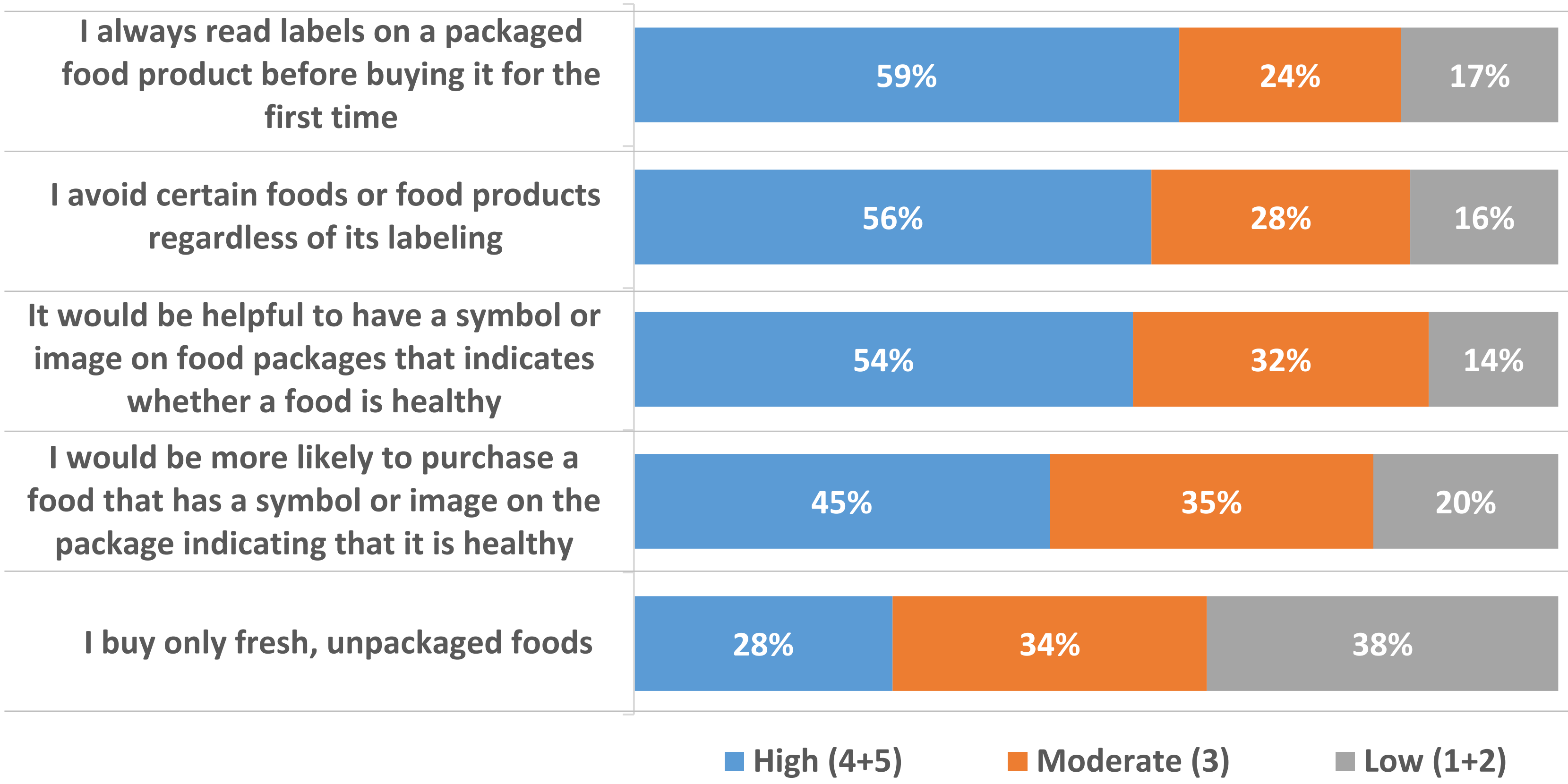
	Average Rank	
Packaged foods that contain ingredients that you want	1.8	Older and White consumers, those living in the South or West, and those with children are more likely than others to look for certain ingredients.
Packaged foods that don't contain ingredients you want to avoid	2.0	Consumers with high incomes and those with a college education are the most inclined to make sure that a packaged food does not contain certain ingredients.
How the packaged food was produced (e.g., locally sourced, sustainable, non-GMO, natural, organic)	2.2	Gen Z's, Hispanic consumers and those with children care the most about how food is produced.

Q13. Please rank order the following three statements in terms of what you look for on a food label or package that tells you if a food is healthy.
Base=Look for healthy options when shopping; n=971

While most consumers always read the labels on their food before purchasing, many would find it helpful and would be more likely to purchase foods if there was a "healthy" symbol on them.

Agreement with Statements about Food Packaging

(% Rating 1-5; 5=Strongly Agree)



Higher level of agreement among…

Low income, low education

Low income, low education, no children, not healthy shoppers

Boomers, low income, Whites, no children, not healthy shoppers

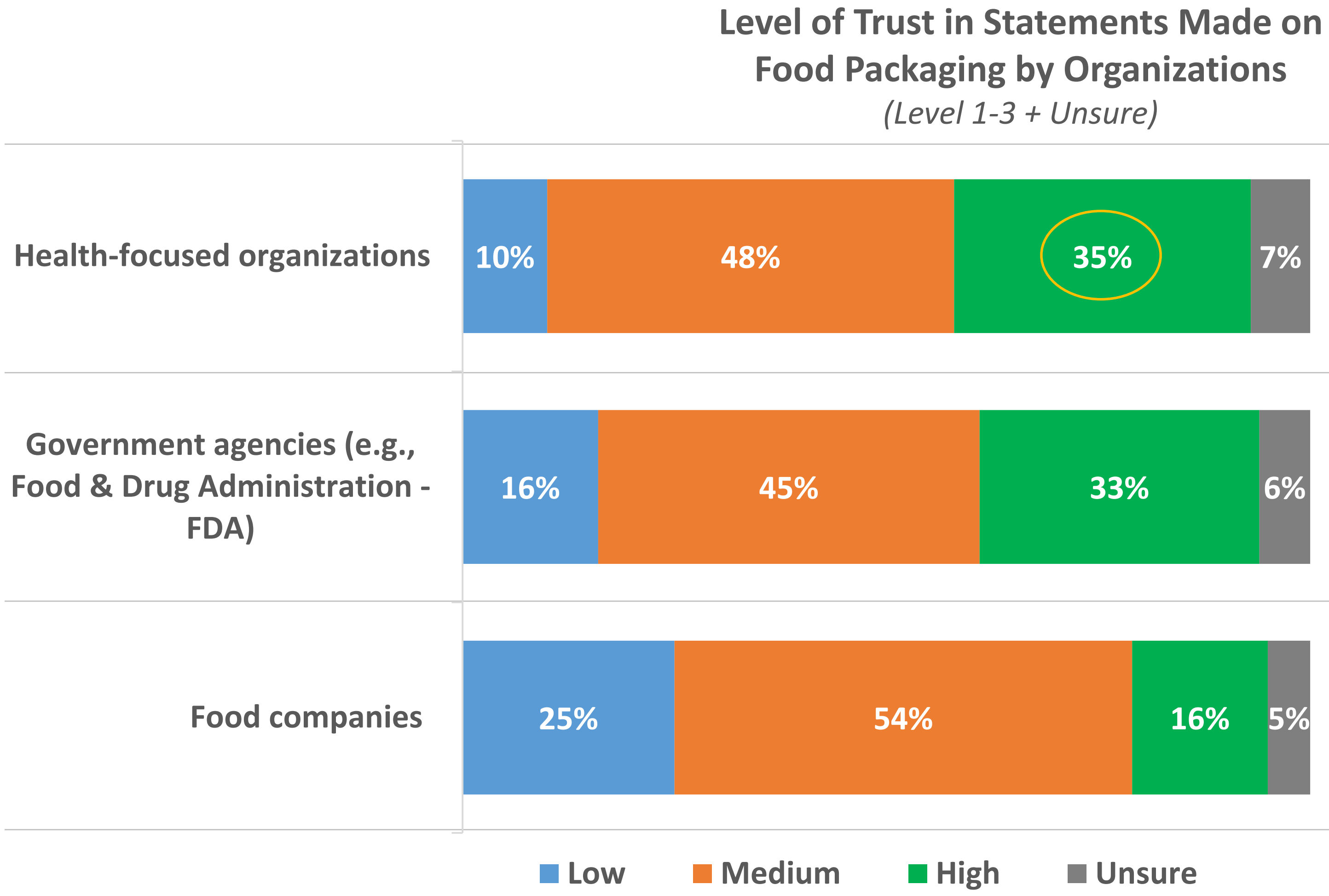
Low income, Whites, no children, not healthy shoppers

Boomers, females, Midwesterners, Whites

Q14. Please indicate your level of agreement with the following statements.
Base=Total Respondents; n=1017

Organizations and Healthy Food Labels

Consumers are somewhat more trusting of health-focused organizations than of government agencies, and much less trusting of food companies in terms of statements made on food packaging.



Higher level of trust among…

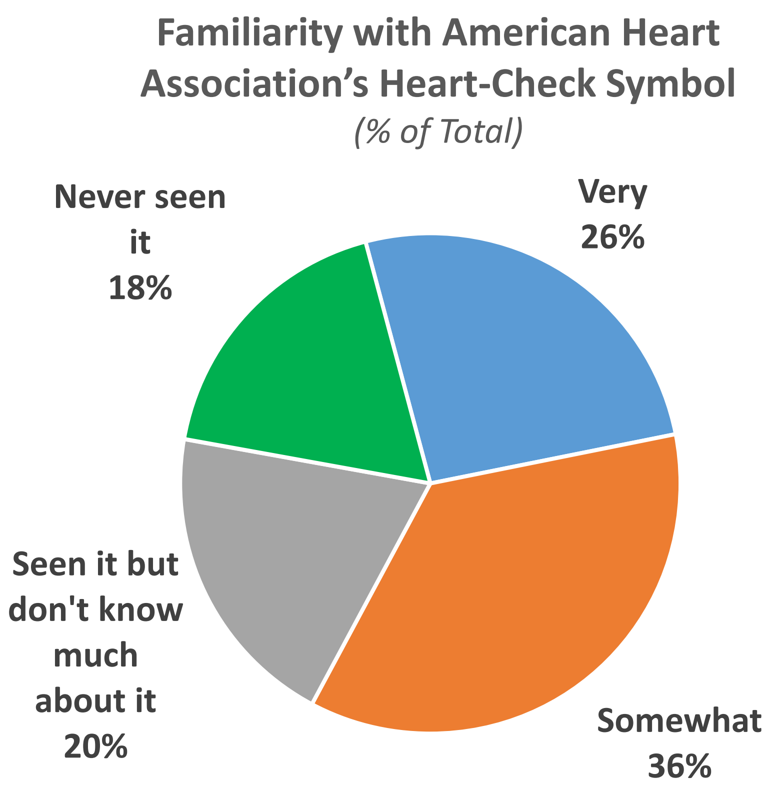
Males, high income, healthy shoppers

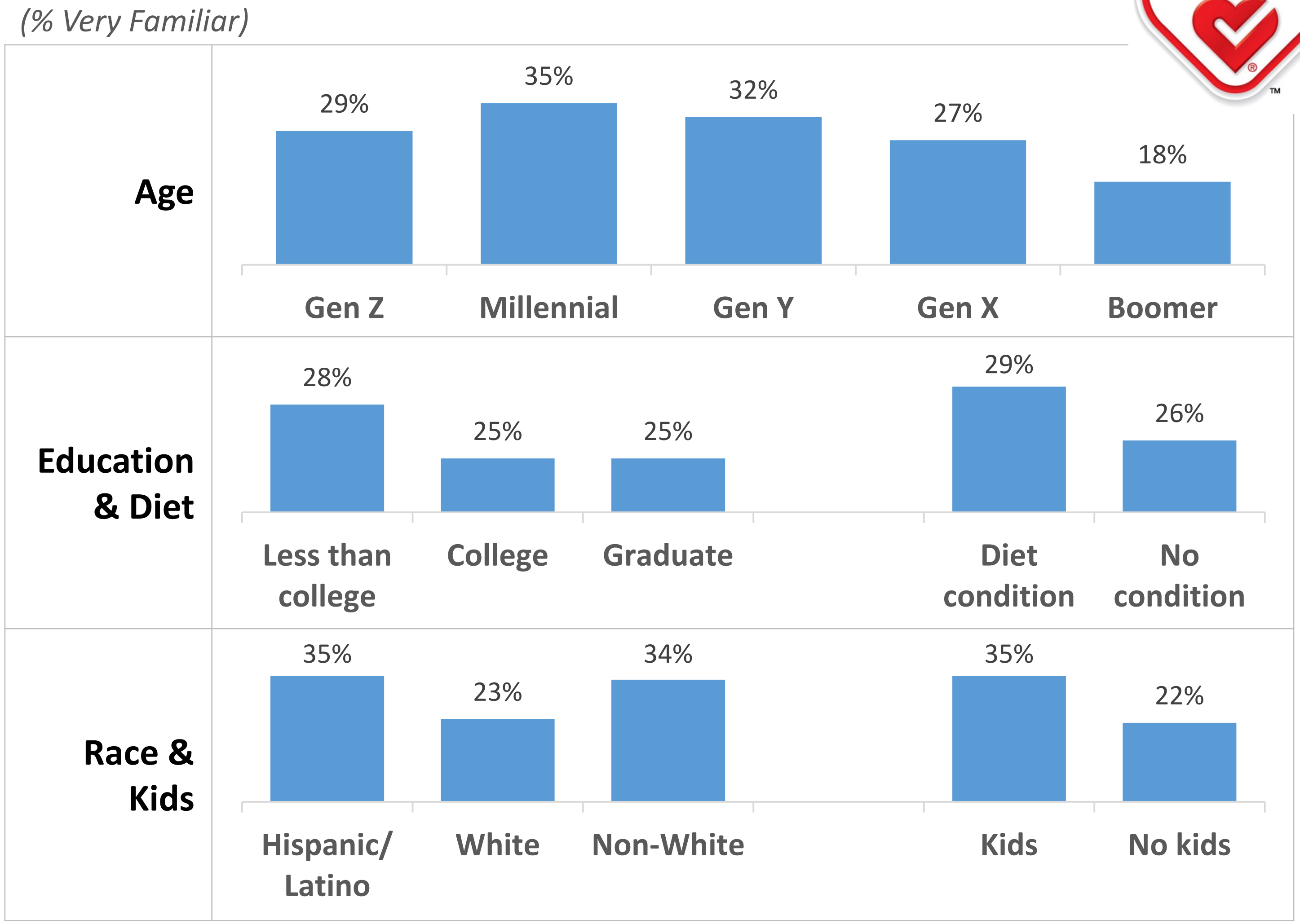
High income, highly educated, Hispanics, non-Whites

Gen Z's, Males, Hispanics, non-Whites

Q16. What level of trust do you have in the statements made on food packaging by each of the following?
Base=Total Respondents; n=1017

Over half of the consumers surveyed (62%) are at least somewhat familiar with the AHA Heart-Check symbol. Younger consumers, those with a diet-related condition and those with children are more familiar than others.

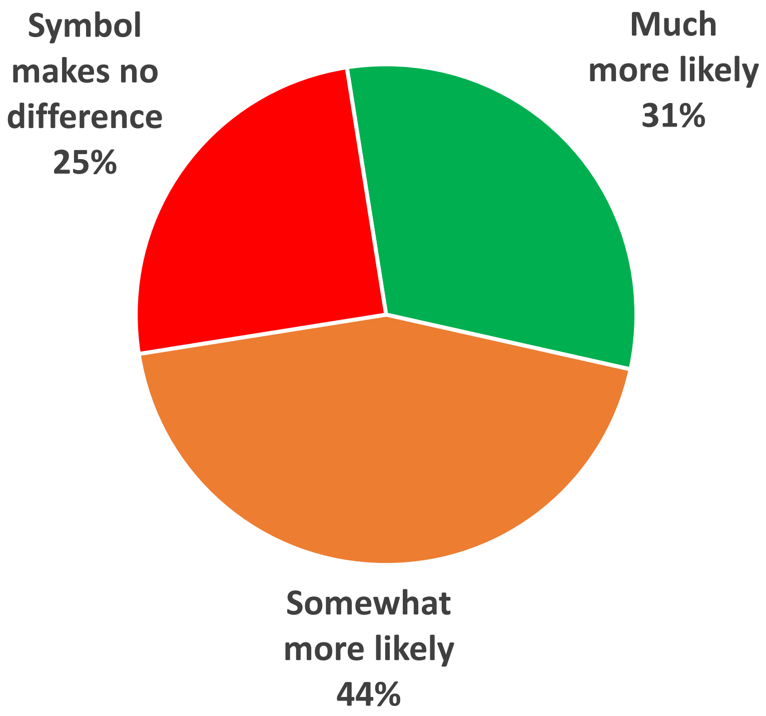




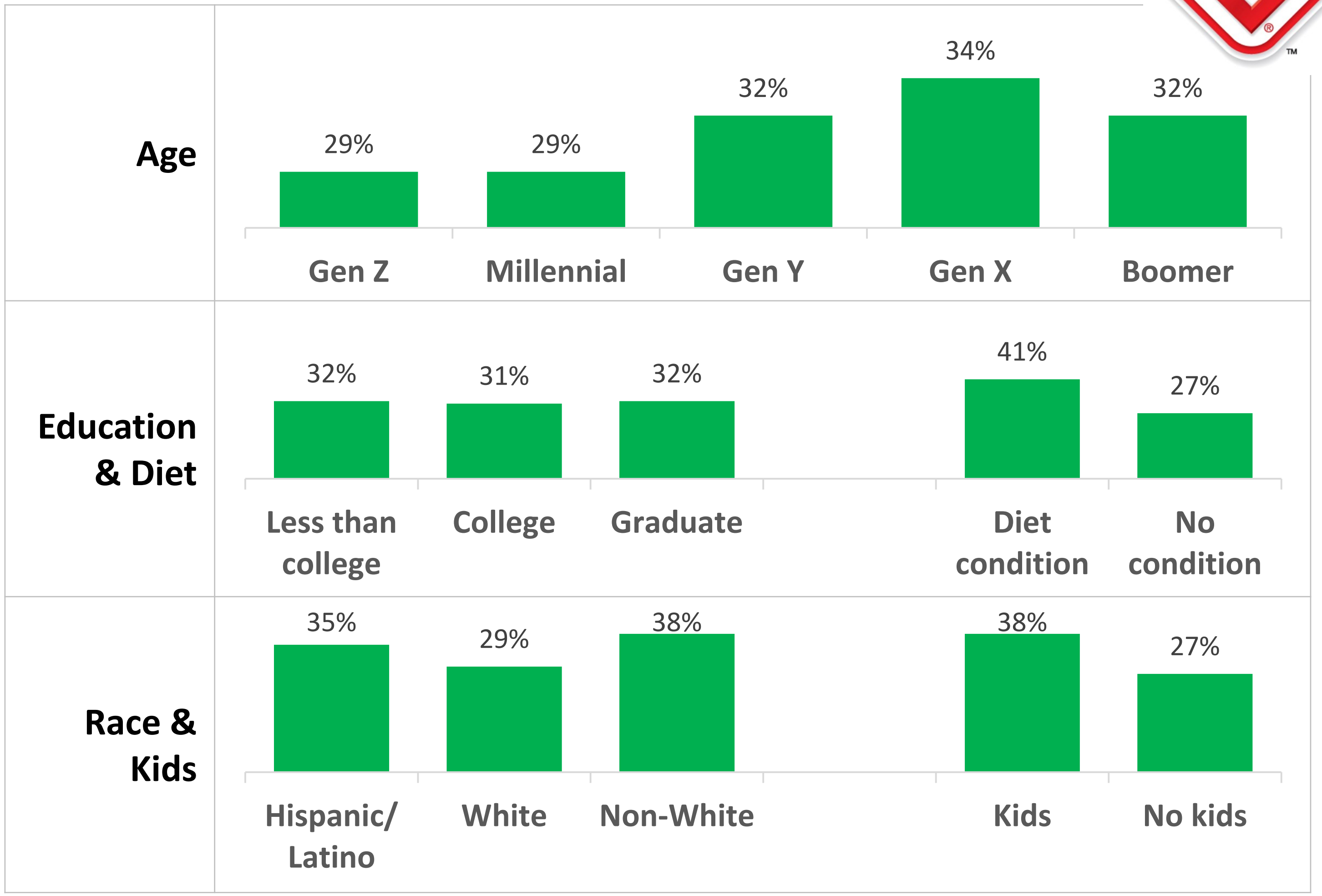
Q17. How familiar are you with the American Heart Association's Heart-Check symbol that appears on some food and beverage packages, shown here?
Bae=Total Respondents; n=1017
Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

About one in three consumers would choose a food with the Heart-Check symbol over one without it; only one in four say it would have no impact. The symbol is more influential for Gen X'ers, those with a diet-related condition and those with children.

Likelihood to Choose One Food Over Another If It Has the Heart-Check Symbol
(% of Total)



(% Much More Likely)



Q18. When choosing between two identical food products, how likely are you to choose the one with the following symbol?
Bae=Total Respondents; n=1017
Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

Demographics

Demographics

	Total	Gen Z	Millennial	Gen Y	Gen X	Boomer
n=	*1017*	*96*	*184*	*209*	*189*	*339*
Gender (Q2)						
Male	47%	29%	30%	44%	57%	59%
Female	53	71	70	56	43	41
Region (Q3)						
Northeast	18%	9%	16%	19%	24%	19%
Midwest	21	18	23	23	22	20
South	38	46	45	37	30	35
West	23	27	16	21	24	26
Household Income (Q4)						
Less than $25,000	24%	46%	25%	23%	23%	19%
$25,000 - $49,999	15	19	15	14	13	16
$50,000 - $74,999	23	17	29	23	21	21
$75,000 - $99,999	16	8	15	19	16	16
$100,000 - $149,999	14	8	10	12	18	16
$150,000 - $199,999	5	0	3	4	6	8
$200,000 or more	3	1	3	4	3	4
Don’t know	0	1	0	0	0	0
Relationship Status (Q19)						
Single, never married	30%	69%	41%	32%	25%	15%
Married or partnered	55	28	54	57	57	59
Divorced, separated or widowed	15	2	4	11	17	26
Rather not say	0	1	1	0	1	0

Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

Demographics

	Total	Gen Z	Millennial	Gen Y	Gen X	Boomer
n=	*1017*	*96*	*184*	*209*	*189*	*339*
Proportion of grocery shopping done personally (Q8)						
All	64%	56%	67%	69%	66%	59%
Most	22	22	22	18	19	28
Some/Shared with another person	14	22	11	13	15	13
Employment Status (Q20)						
Employed full-time	43%	32%	51%	60%	59%	24%
Employed part-time	10	15	13	10	10	8
Temporarily unemployed; seeking work	6	8	8	9	5	3
Unemployed; not seeking work	9	10	14	10	9	4
Student	3	23	3	1	0	0
Full-time caregiver	4	10	10	5	2	0
Retired	23	0	0	4	10	60
Other	3	1	2	2	6	2
Education (Q23)						
High School or less	21%	38%	23%	22%	22%	15%
Trade or Technical School	4	4	3	3	4	4
Some College – No degree	20	28	19	19	22	19
Two-Year College degree (Associate's)	10	113	8	9	10	11
Four-Year College degree (Bachelor's)	26	14	33	28	20	27
Post-graduate work or degree	19	3	15	19	22	24
Rather not say	0	0	0	0	0	0

Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+

Demographics

	Total	Gen Z	Millennial	Gen Y	Gen X	Boomer
n=	*1017*	*96*	*184*	*209*	*189*	*339*
Ethnicity (Q6)						
White or Caucasian	71%	63%	71%	63%	62%	83%
Black or African American	13	21	15	17	14	8
Asian or Asian American	8	6	6	12	10	6
American Indian, Alaska native, Native Hawaiian or other Pacific Islander	2	0	1	2	4	0
Other	6	10	7	6	10	3
Hispanic/Latino (Q5)	13%	24%	16%	18%	14%	3%
# People in Household (Q21)						
One, just me	22%	15%	11%	18%	23%	32%
Two	37	19	27	27	37	54
Three	18	30	24	23	19	8
Four	13	21	20	19	13	3
Five or more	10	16	18	12	9	3
Children in household (yes) (Q22)	43%	56%	63%	64%	42%	10%
Average BMI (calculated average) (Q25/Q26)	29.3	26.2	29.0	30.7	30.8	28.8
Have any diet-related condition such as diabetes, high blood pressure, high cholesterol or something similar (Q24)	30%	14%	16%	22%	29%	47%
Receiving local, state or federal food assistance (Q27)	21%	26%	35%	23%	16%	13%

Gen Z=Age 18-24; Millennial=Age 25-34; Gen Y=Age 35-44; Gen X=Age 45-54; Boomer=Age 55+