

2019 Food & Health Survey



INTERNATIONAL
FOOD INFORMATION
COUNCIL FOUNDATION





BACKGROUND

The International Food Information Council (IFIC) Foundation's 2019 Food and Health Survey marks the 14th time the IFIC Foundation has surveyed American consumers to understand their perceptions, beliefs and behaviors around food and food purchasing decisions.

This year, the survey continues an examination of issues related to health and diet, food components, food production and food safety. It also explores new topics, such as food allergies and plant-based diets.

A supplement to this report, produced in partnership with the American Institute for Cancer Research and focused on how cancer-prevention influences food choices among Gen X consumers, will be released in Fall 2019.

METHODOLOGY

- Online survey of 1,012 Americans ages 18 to 80. March 22 to April 9, 2019. The survey took approximately 21 minutes to complete.
- The results were weighted to ensure that they are reflective of the American population ages 18 to 80, as seen in the 2018 Current Population Survey. Specifically, they were weighted by age, education, gender, race/ethnicity and region.
- The survey was conducted by Greenwald & Associates, using Dynata's consumer panel (previously known as ResearchNow).
- Note: significant changes in trend vs. 2018 are indicated where appropriate with up and down arrows.



Executive Summary

This year's 2019 Food and Health Survey seeks to understand consumers' perceptions and behaviors around food and food purchasing decisions.

- The findings from this year's online survey of 1,012 Americans ages 18 to 80 focuses on:
 - Consumer confusion around environmental sustainability
 - Food and beverage purchase drivers
 - Plant-based diets and eating patterns generally
 - Food allergies and how they are managed
 - The link between food and desired health outcomes
 - Beliefs about food production and food technologies
 - Views on food safety and sources of information about safety issues
- Findings are presented for all respondents. Additional insights are provided based on how findings vary by different types of demographic groups such as age, race, gender and income.

Key Findings

This year, some of the more compelling findings of the Food and Health Survey include:

- **Consumers struggle to know how to recognize environmentally sustainable sources.** While environmental sustainability is the lowest of the purchase drivers discussed in the survey, 6 in 10 consumers say it is hard to know whether the food choices they make are environmentally sustainable, and of those who agree, 63% say it would have a greater influence on their choices if it were easier.
- **Brand trust and familiar ingredients matter.** While taste remains the top driver of food/beverage purchases, trust in a brand and recognizing the ingredients that go into a product are surprisingly impactful. In fact, these factors are similar to price in impact. Those who have made changes to their diet in the last 10 years are especially likely to care about recognizing ingredients.

Executive Summary

Key Findings Continued

- **Familiarity and interest in plant-based diets is high.** Nearly 3 in 4 consumers say they have heard of plant-based diets and half of all consumers are interested in learning more. That said, many think the term describes a vegan diet and more than half think it would be hard to stick with over the holidays and difficult to accommodate at restaurants.
- **One-third say they eat plant-based protein daily.** While very few say they are actively following a plant-based diet, 34% say they consume plant-based protein daily. One-quarter also say they eat more plant-based protein than they did 12 months ago.
- **Similar number of Americans are dieting compared to 2018, with clean eating diets most common.** 38% of consumers say they followed a specific eating pattern or diet in the past year, similar to the 36% who did so in 2018. While intermittent fasting continues to be a relatively common choice, clean eating (added to the survey for the first time this year) is actually the most widely cited diet that consumers say they follow.
- **Frequent snackers are more susceptible to cravings, habit, and convenience.** Over half of consumers snack at least daily and 1 in 4 say they snack multiple times a day. Not surprisingly, many say they snack simply because they are hungry/thirsty. Yet those who snack more than once a day are much more likely to say that they do so because they crave sweet or salty snacks, that they do it out of habit, or that they do it because the snacks are available/convenient.
- **1 in 4 consumers actively seek health benefits from foods.** Although many say they simply try to eat healthy in general, 23% of consumers say they actively seek out foods or follow a diet for health benefits. Most often the benefits they seek are weight loss, energy, digestive health, and heart health.
- **Government agencies most trusted for recall info.** 45% of consumers say a government agency would be their top source for information about a recall. This is especially true of older consumers. No other source garners even 10%.

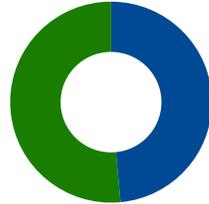


Demographics

Demographics

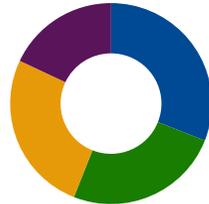
Gender

Male	48%
Female	51
Prefer not to say	*



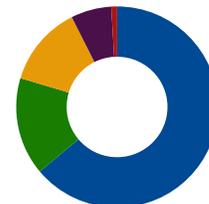
Age

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



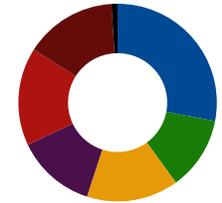
Race/Ethnicity

White	69%
Hispanic/Latino/Spanish descent	17
Black or African American	14
Asian or Pacific Islander	7
Other	2



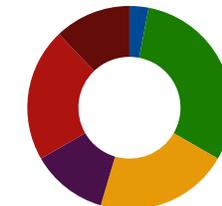
Household Income

Less than \$35,000	28%
\$35,000 to \$49,999	12
\$50,000 to \$74,999	15
\$75,000 to \$99,999	13
\$100,000 to \$149,999	16
\$150,000 and above	15
Don't know	*
Prefer not to answer	1



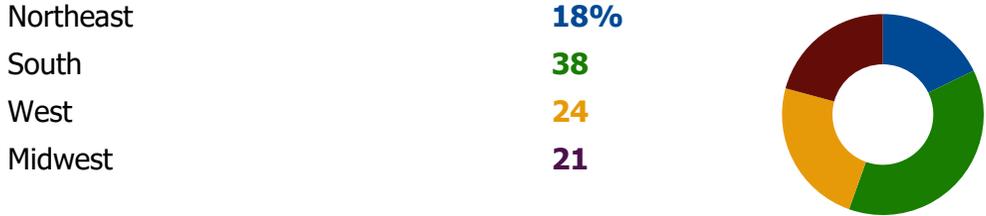
Education

Less than high school	3%
Graduated high school	30
Some college	21
AA degree/technical/vocational	12
Bachelor's degree	21
Graduate/professional degree	12

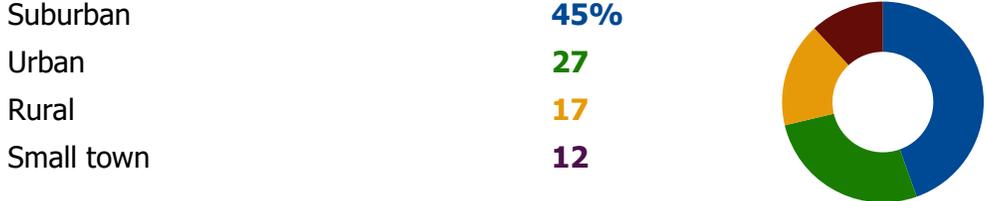


Demographics

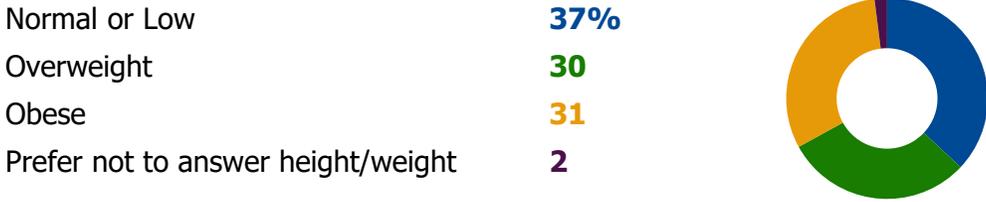
US Region



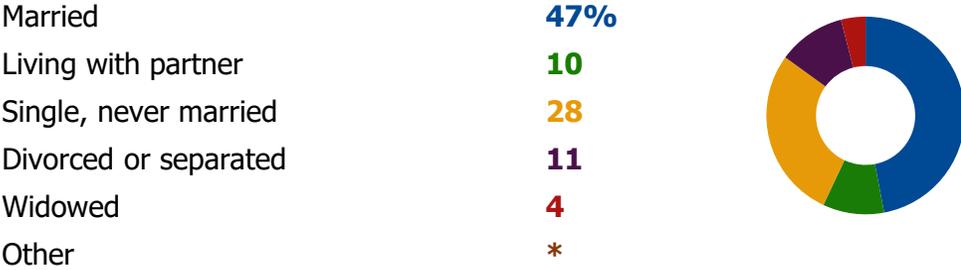
Type of Location



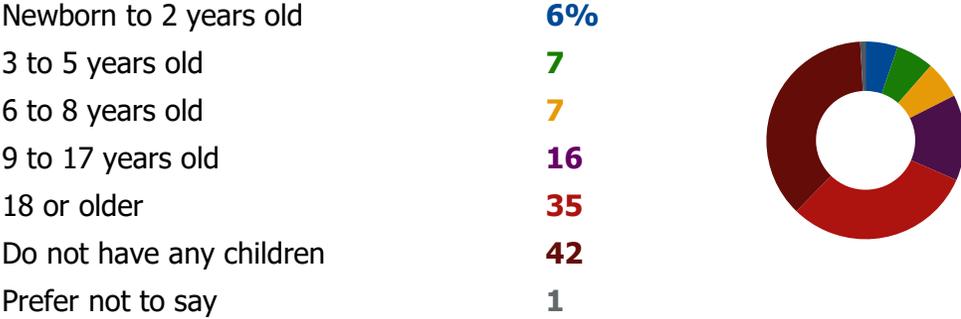
BMI Score



Marital Status



Children's Ages



Demographics

Medical Conditions Consumers are Currently Being Treated for	<i>Multiple responses accepted</i>
High blood pressure	25%
High cholesterol	23%
Stress/Anxiety/Depression	15%
Overweight/obesity	11%
Diabetes	8%
Gastrointestinal disorders	6%
Osteoporosis	4%
Heart disease	3%
Muscle strength/mobility	3%
Attention deficit hyperactivity disorder (ADHD)	2%
Cancer/cancer survivor	2%
Stroke	1%
None of the above	46%

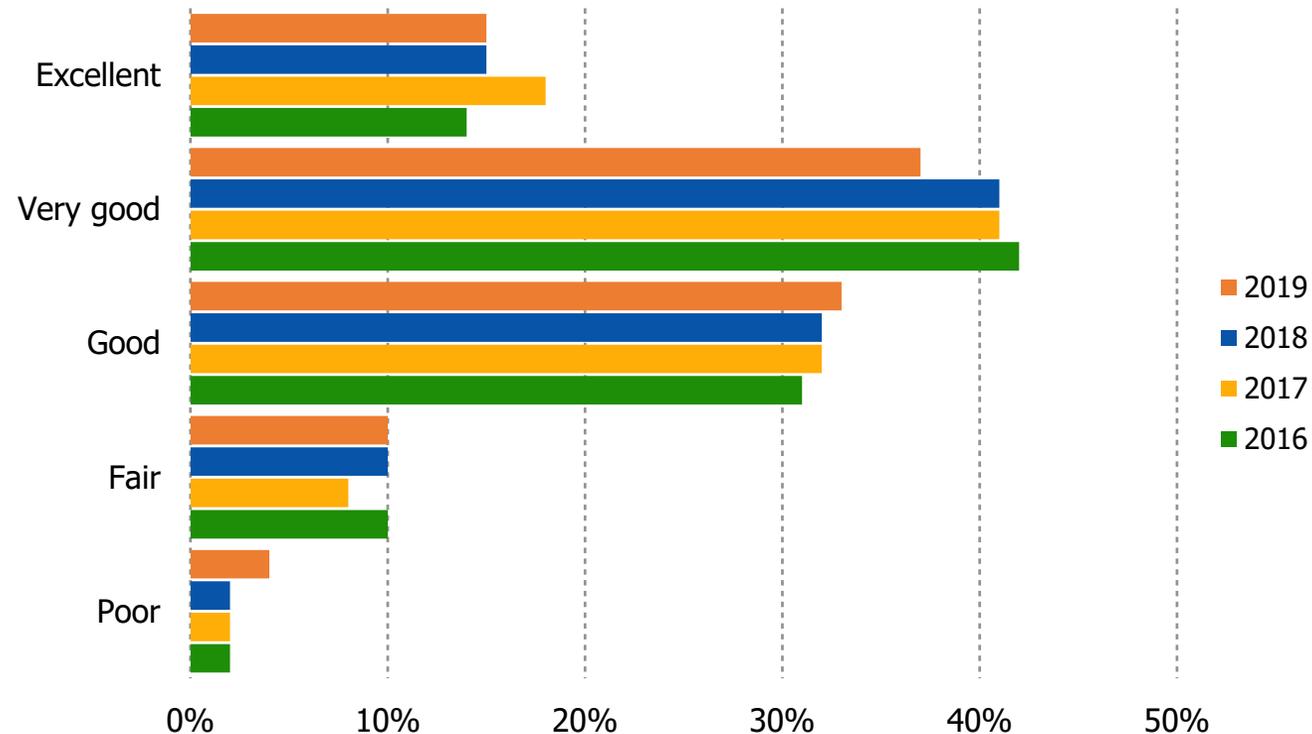


Primary Purchase Drivers

Consumers View Themselves in Good Health

Despite over half rating health as excellent/very good, three in five of respondents are classified as overweight or obese

Self-Reported Health Status



53%

Of consumers indicate their health is excellent or very good

68%

Of consumers with income above \$75,000 rate health as excellent or very good, compared to 31% of those with income less than \$35,000

68%

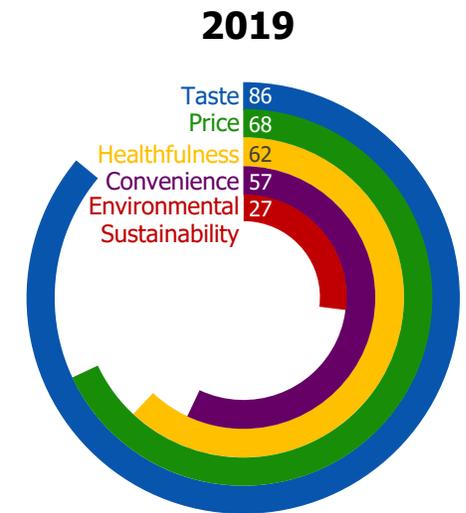
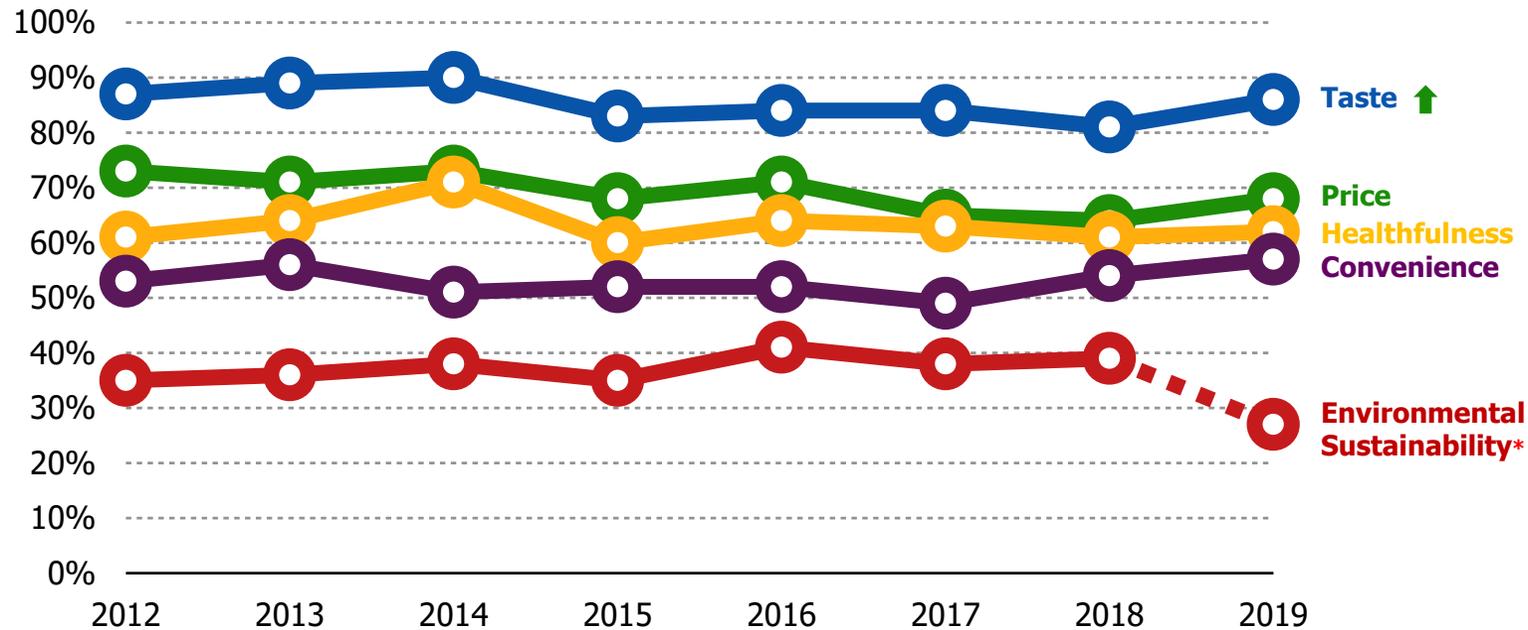
Of college grads rate their health as excellent or very good, compared to 45% of those with less than a college degree

Q1: How would you describe your own health, in general? (n=1,012)

Taste and Price Remain Top Drivers

Taste is more important to older consumers while price is more important to younger ones; the importance of taste has increased since 2018

Purchase Drivers Over Time
(% 4-5 Impact out of 5)



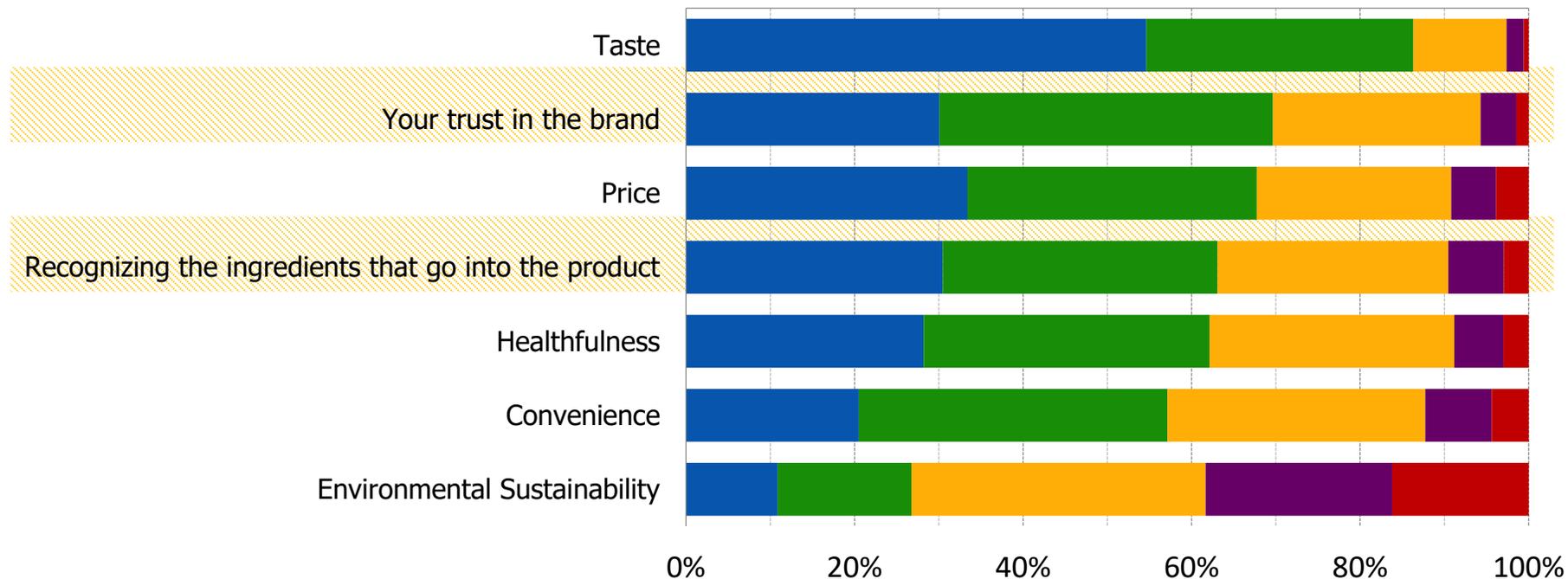
Q8: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,012)
*Prior to 2019, Environmental Sustainability was asked simply as "Sustainability"

Trust in Brand and Ingredient Recognition Have a Significant Impact on Purchases

3 in 10 consumers say that recognizing the ingredients and trust in the brand have a great impact, nearly as high as price

Impact of Brand Trust and Recognizable Ingredients

■ 5 - A great impact ■ 4 ■ 3 ■ 2 ■ 1 - No impact



85%

Of those 65+ say trust is a top driver vs. roughly 66% younger consumers

88%

Of consumers with no allergies in the household rate taste as most important compared to 79% of consumers with allergies in the household

Q8: How much of an impact do the following have on your decision to buy foods and beverages? (n=1,012)

Q9: How much of an impact does the following have on your decision to buy foods and beverages? (n=1,012)

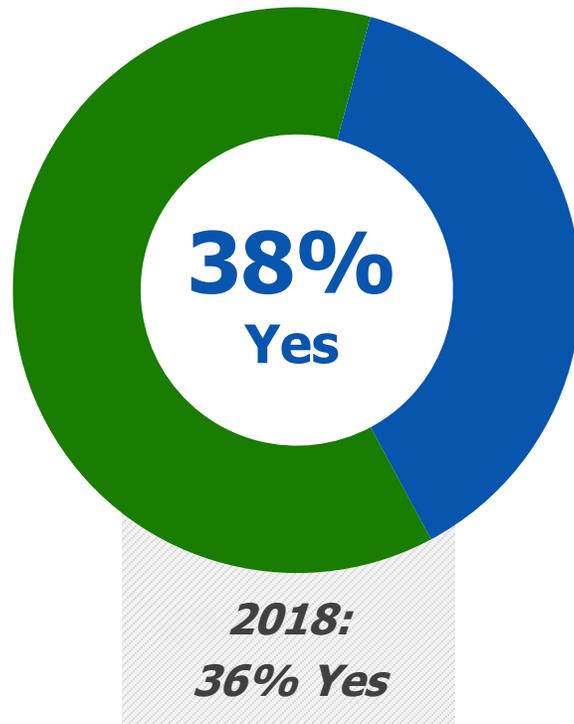


Diets and Eating/Shopping Patterns

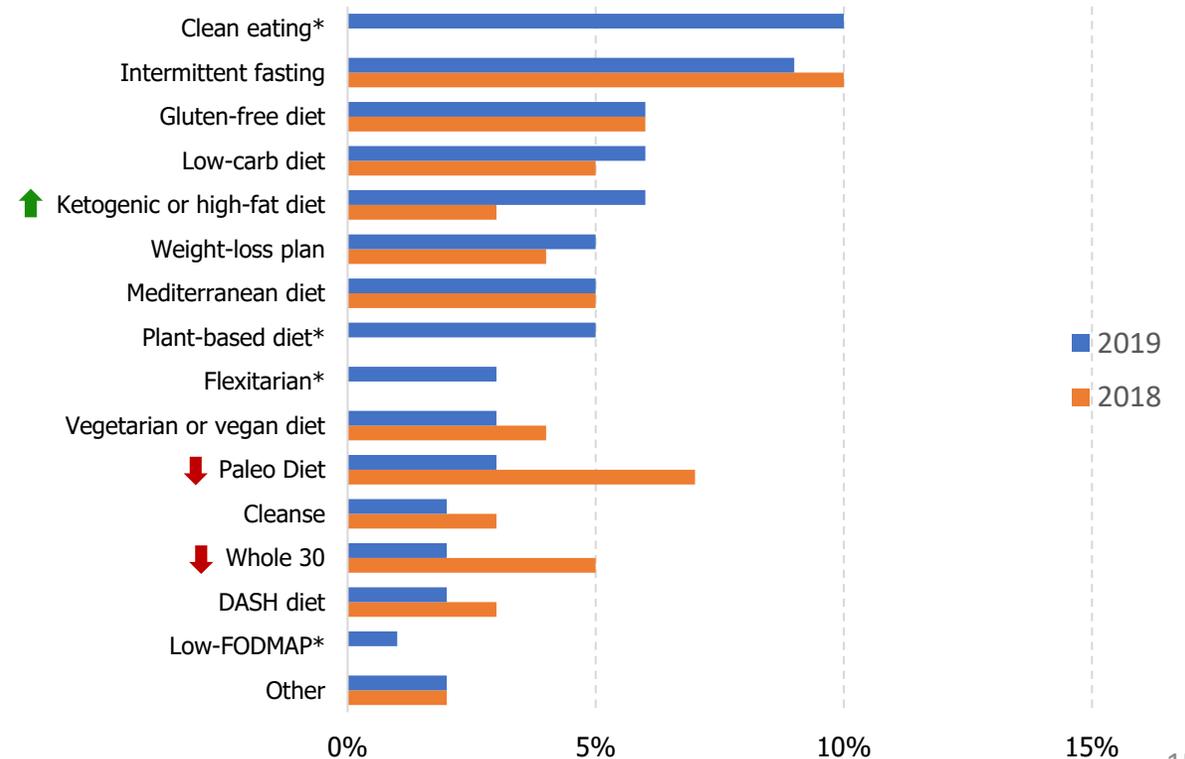
Clean Eating the Most Widely Cited Diet in 2019

Most common eating patterns/diets include clean eating and intermittent fasting

Followed A Diet in Past Year?



Type of Diet Followed



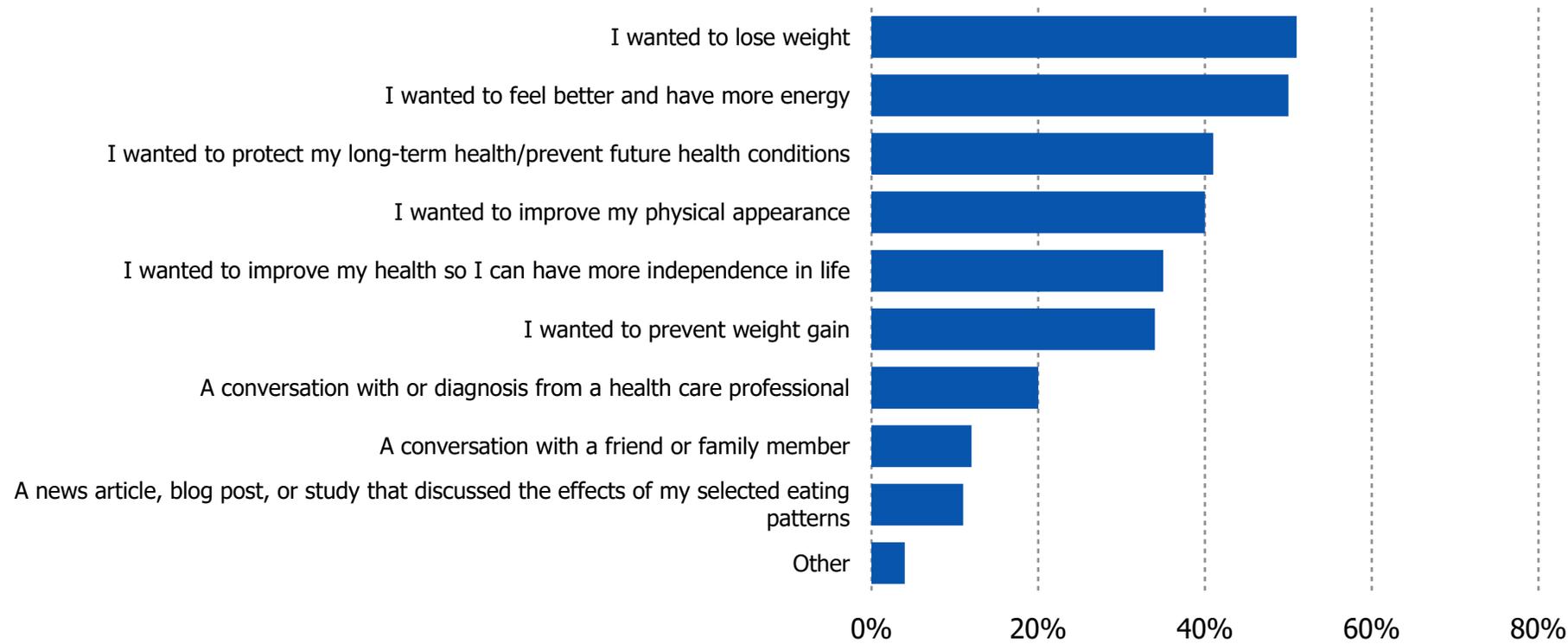
Q33: Have you followed any specific eating pattern or diet at any time in the past year? Select all that apply. (n=1,012)

*Indicates new diet added in 2019

Over Half Of those Adopting a Diet Cite Weight Loss as the Motivator

Wanting to feel better/have more energy is cited right behind weight loss

Motivators for Adopting a New Diet
(Of those who followed a specific eating pattern in past year)

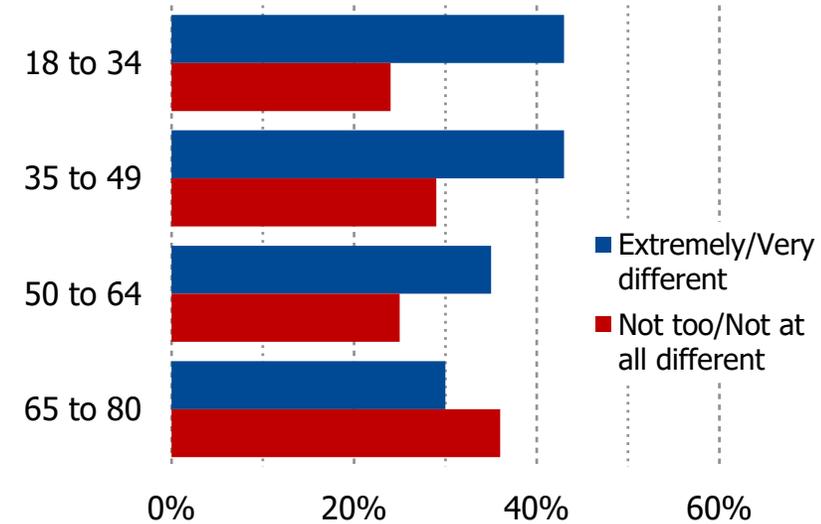
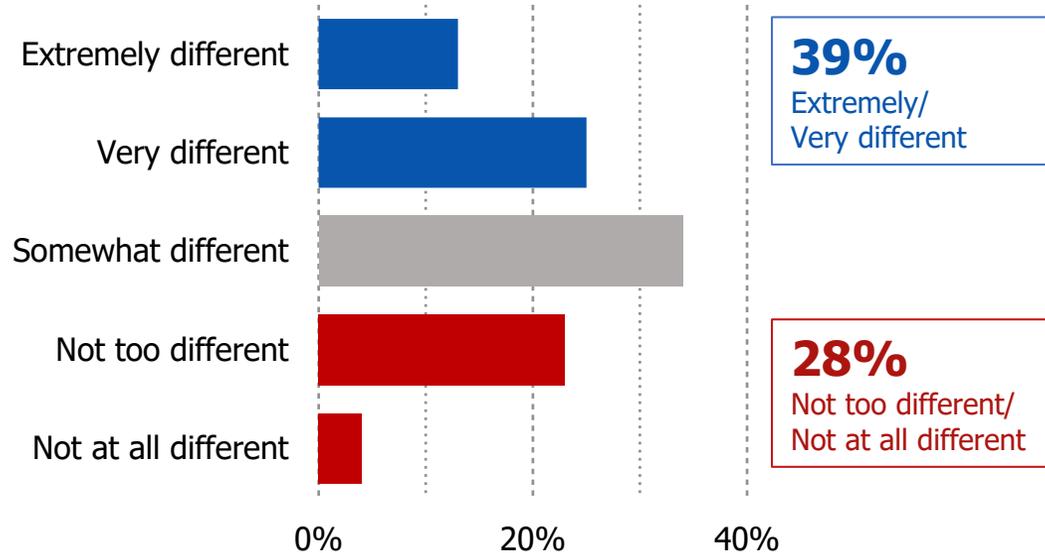


Q34: Which of the following motivated you to make an effort to adopt a new eating pattern/diet? Select all that apply. (Of those who followed a specific eating pattern in past year, n=362)

Diets Have Changed Compared to a Decade Ago

2 in 5 say that their diet is extremely or very different from what it looked like 10 years ago

How different is your overall diet now versus what it looked like 10 years ago?



50%
Of Hispanic/Latino consumers say that their diet is extremely/very different compared to 35% of non-Hispanic white consumers

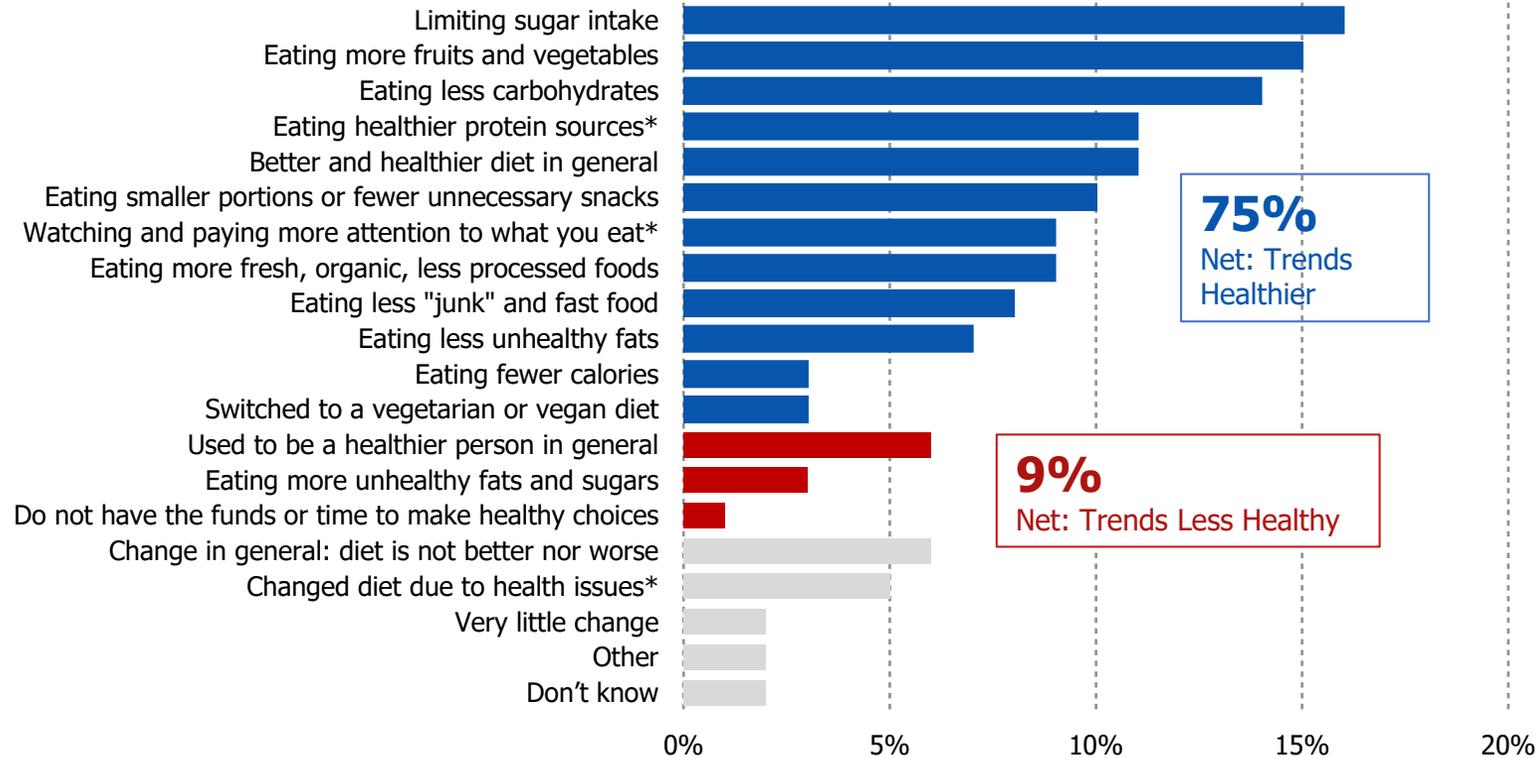
55%
Of consumers with allergies in the household say their diet is extremely/very different from 10 years ago, vs. 35% of consumer without an allergy in the household

Q6: How different is your overall diet now versus what it looked like 10 years ago? (n=1,012)

People Say They Are Eating Healthier Now

Limiting sugar intake and eating more fruit and vegetables are the top ways in which consumers' diets have changed

Ways in Which Diet Has Changed



Consumers from the South are less likely than their counterparts to report that their diet is better now vs. 10 years ago

80%
Of consumers with an income of \$75k report having a better diet compared to 62% of consumers with an income of less than \$35k

79%
Of consumers without children under 18 report having a better diet compared to 66% of consumers with children under 18

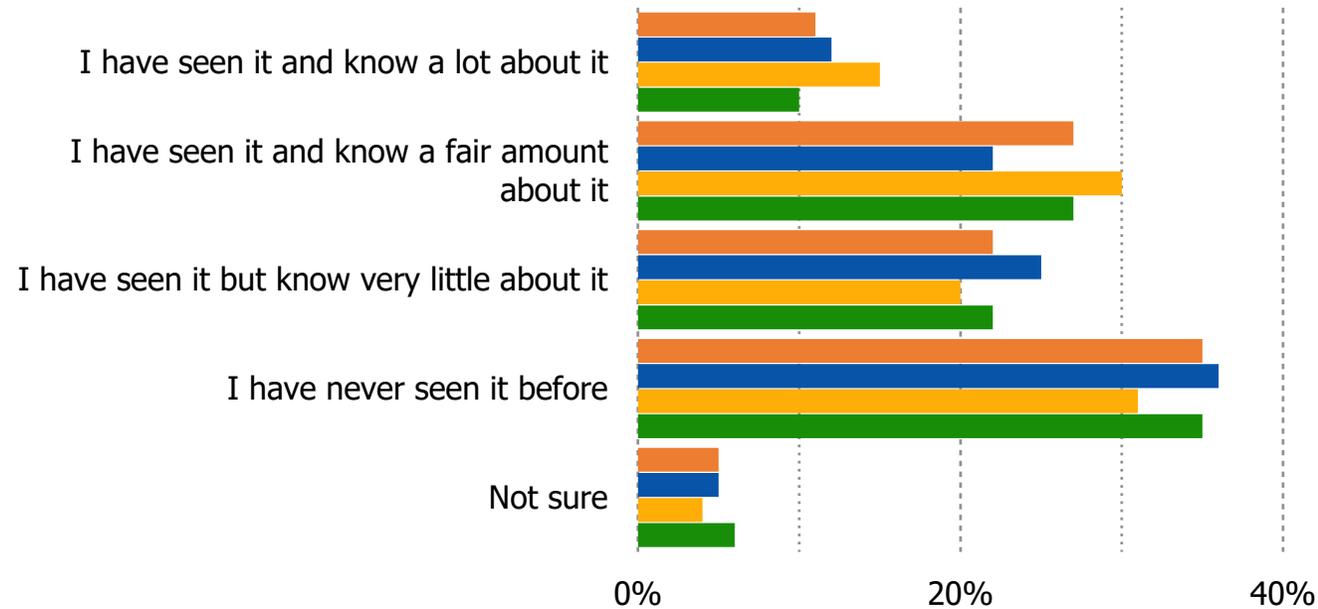
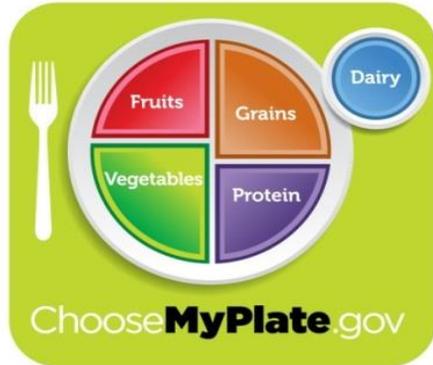
*Response text abridged
Q7: In what ways is your diet different from what it looked like 10 years ago? Please give as much detail as possible. (Of those who's diet is different, n=386)

Over One-Third Have Never Seen MyPlate

Female consumers and consumers who have tried a diet in the past year are particularly familiar with the icon

Familiarity with the MyPlate Graphic

2019 2018 2017 2016



60%
Have seen the MyPlate graphic

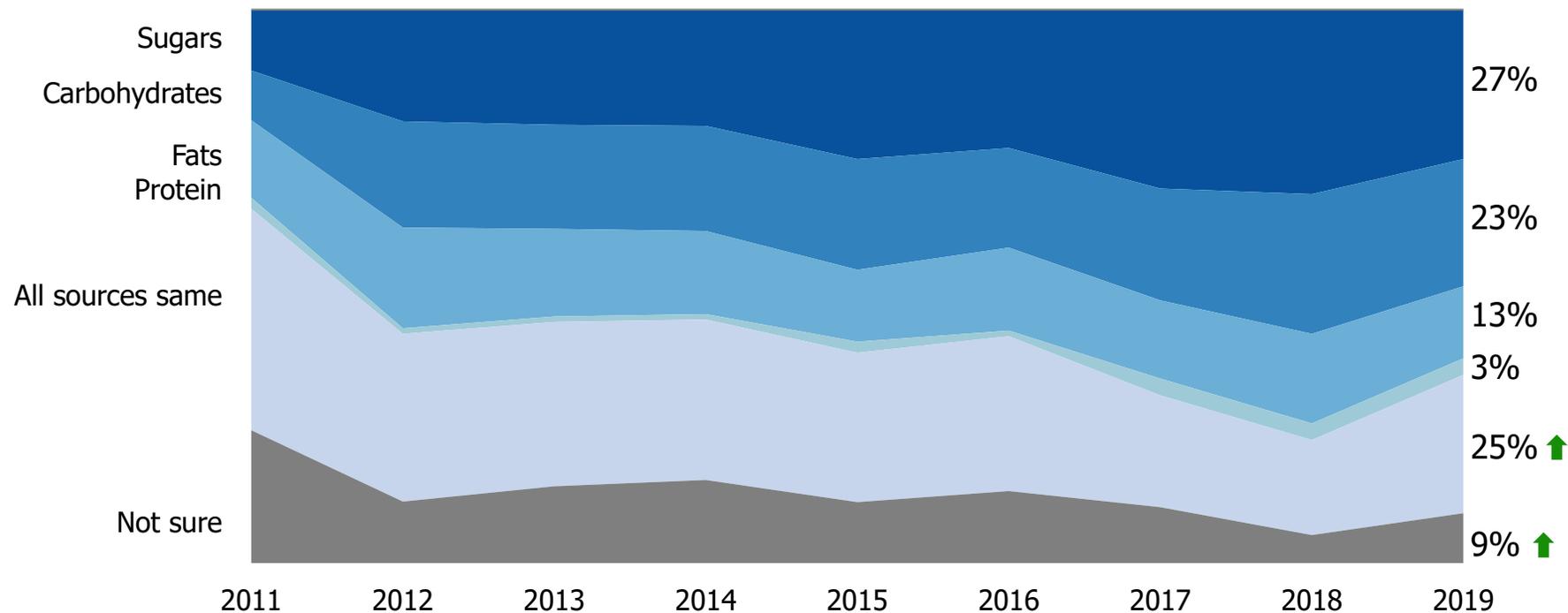
46%
Of women know at least a fair amount about the MyPlate graphic compared to 30% of men

Q2: How familiar are you, if at all, with the following graphic? (n=1,012)

Sugar and Carbs Believed to be Most Likely to Cause Weight Gain

One-quarter believe calories from all sources impact weight the same, an increase from 2018

Source of Calories Most Likely to Cause Weight Gain



33%
Of those with a college degree indicate sugars are the most likely to cause weight gain compared to 25% of those with less than a college degree

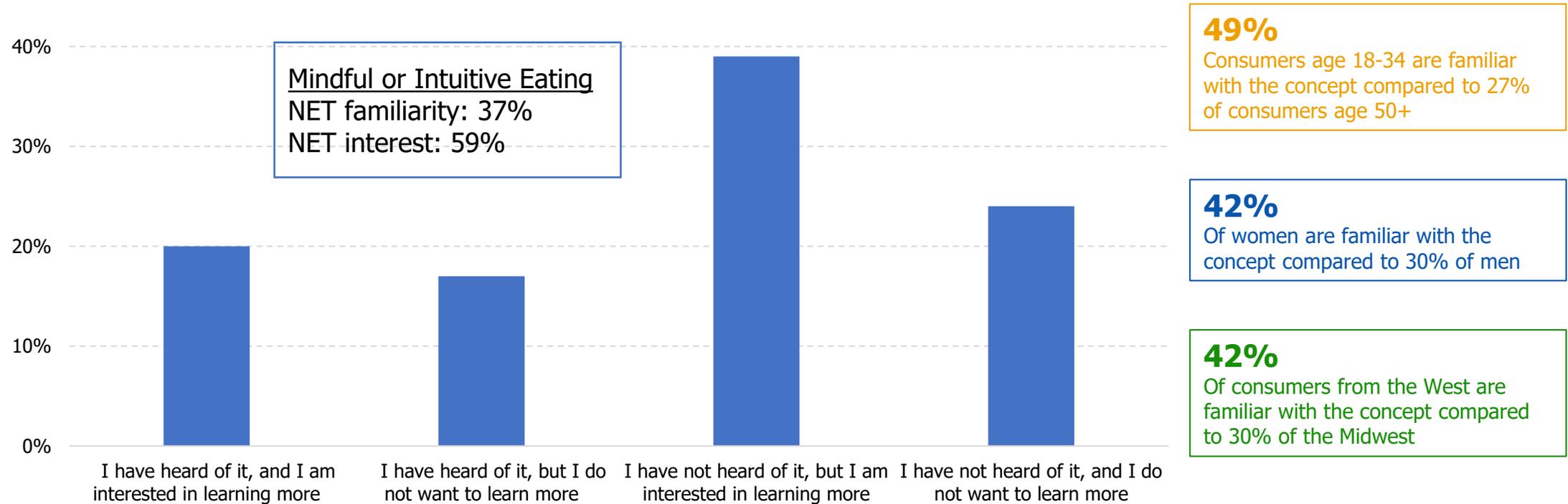
28%
Of women say that carbohydrates are most likely to cause weight gain compared to 18% of men

Q3: What source of calories is the most likely to cause weight gain? (n=1,012)

Nearly 4 in 10 Unfamiliar with Mindful Eating

However, 3 in 5 are interested in learning more about mindful or intuitive eating

Familiarity and Interest in Mindful or Intuitive Eating

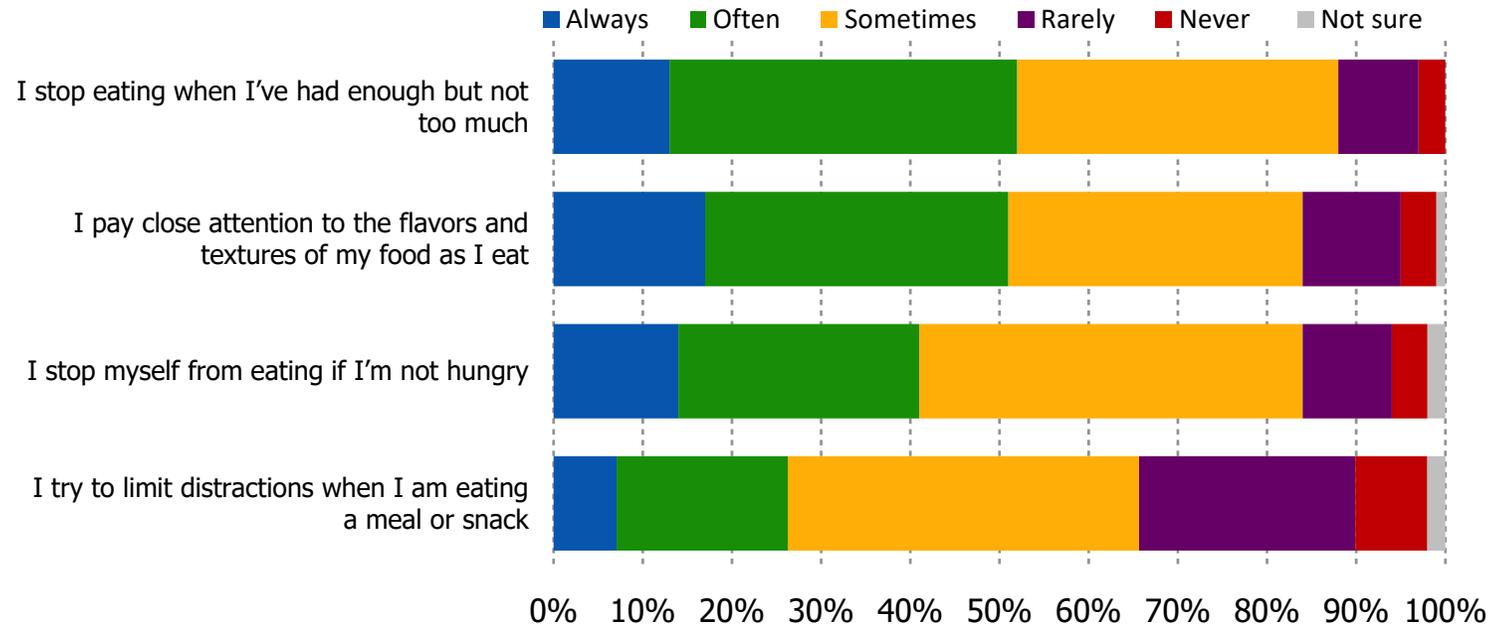


Q32: Which of the following best describes your familiarity and interest in the practice of "mindful or intuitive eating"? (n=1,012)

Distracted Eating May be the New Normal

Only 13 percent say they always stop eating when they've had enough but not too much

Eating Patterns Related to Mindful/Intuitive Eating



57%

Of consumers in very good health say that they stop eating when they've had enough compared to 48% of consumers in good health and 41% of consumers in fair/poor health

42%

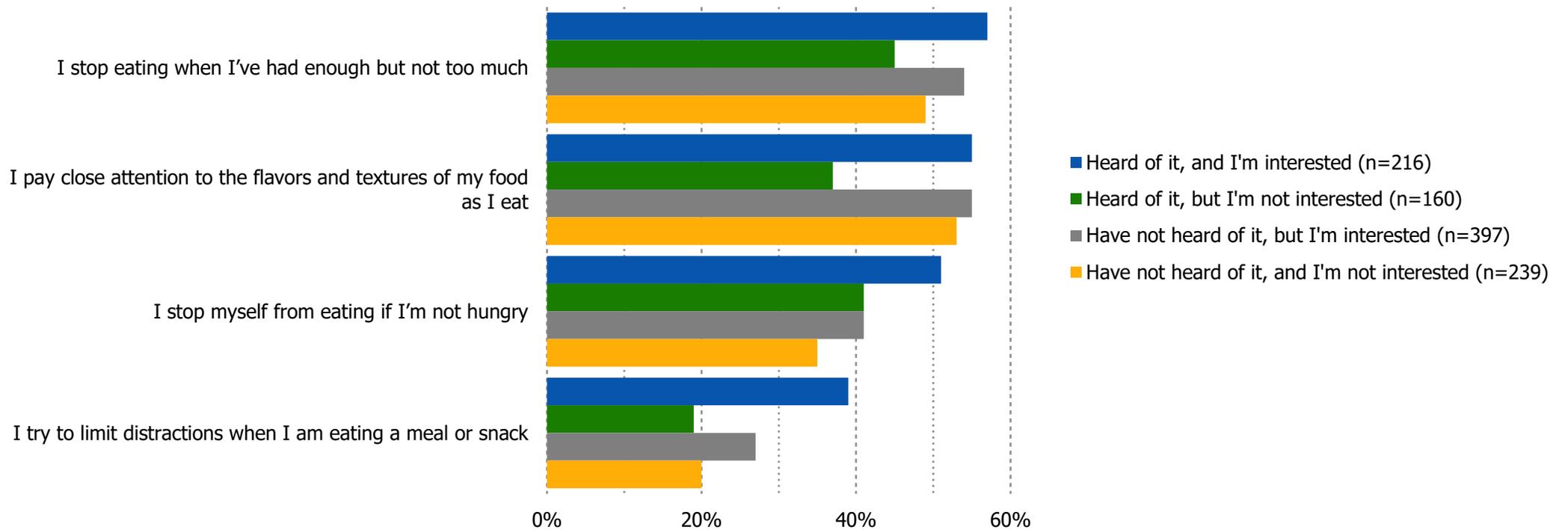
Of African Americans state they often or always try to limit distractions when they eat compared to 25% of non-Hispanic whites and 20% of Hispanics

Q29: How often do you do the following? (n=1,012)

Mindful Eating: Interest vs Practices

Consumers who report being interested in mindful/intuitive eating more often partake in mindful eating habits even if not familiar

Differences in Eating Patterns by Familiarity and Interest in Mindful/Intuitive Eating

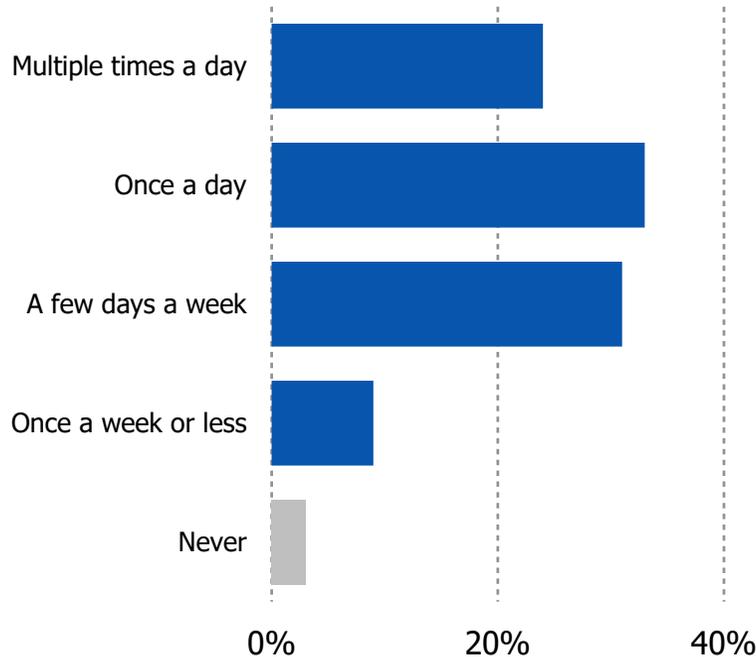


Q29: How often do you do the following? (n-size varies)

Nearly Everyone Snacks At Some Point During the Week

Being hungry or thirsty and craving sweet and/or salty snacks are top reasons why people snack

Frequency of Snacking



Reasons for Snacking

(Of those who snack)



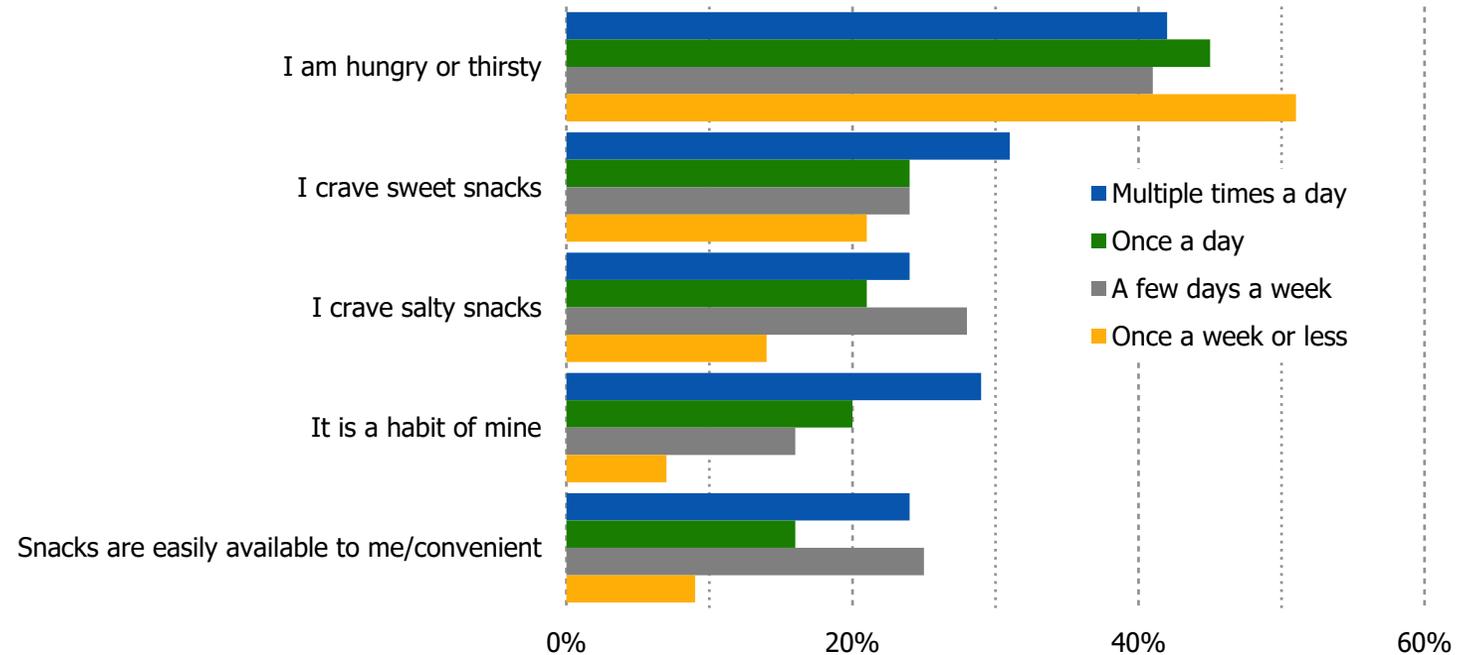
Q30: In a typical week, how often do you snack in addition to your main meals? (n=1,012)

Q31: Which of the following are the most common reasons why you choose to snack? Please select your top 3 reasons. (Of those who snack ever, n=986)

Infrequent Snackers Driven More by Hunger and Thirst

Frequent snackers more often report doing so because of a craving or out of habit

Key Differences in Snacking By Frequency of Snacking (Of those who snack)



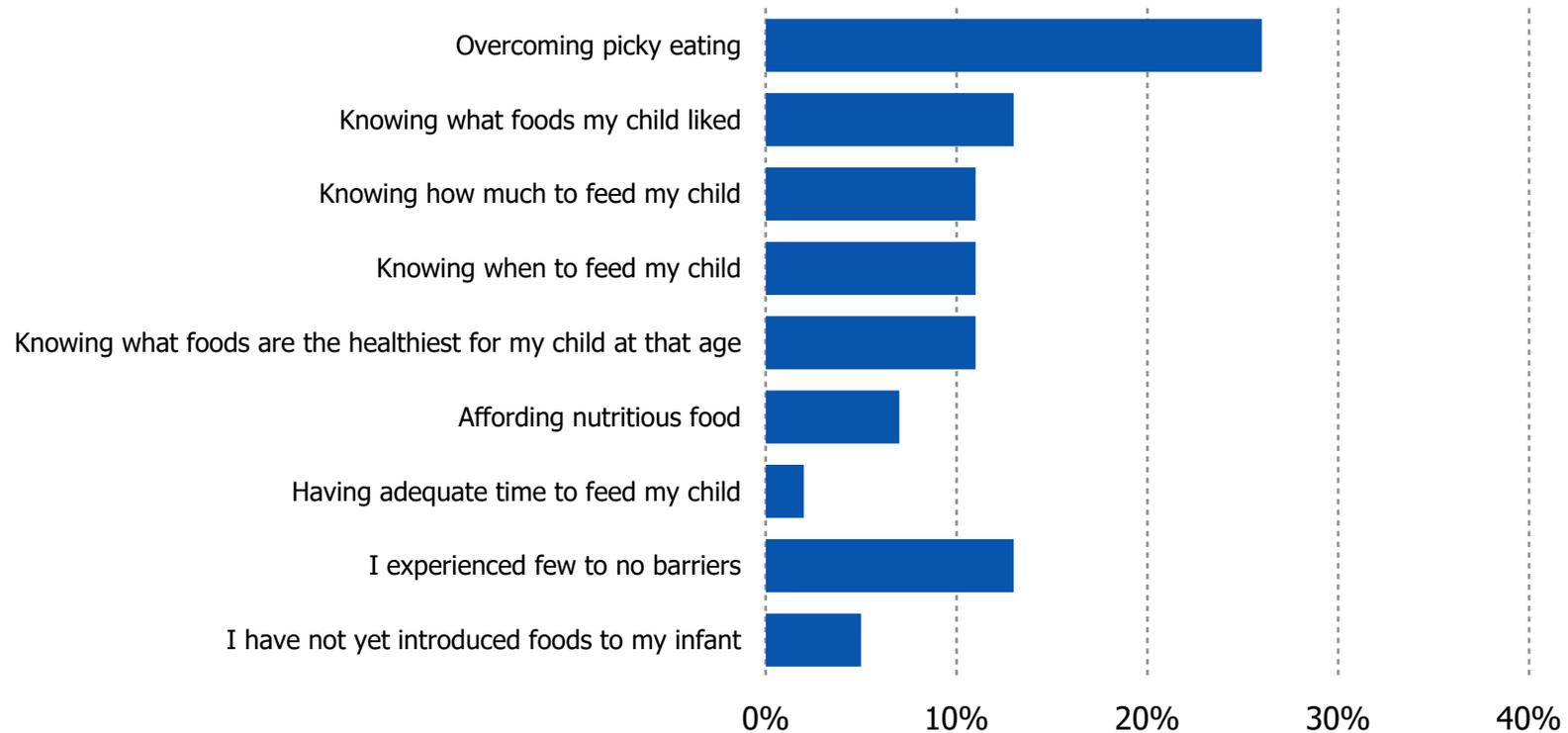
Q30: In a typical week, how often do you snack in addition to your main meals? (n=1,012)

Q31: Which of the following are the most common reasons why you choose to snack? Please select your top 3 reasons. (Of those who snack ever, n=986)

Picky Eaters Are a Challenge For Parents

Only 13% say they experienced few to no barriers in introducing foods

Biggest Challenge When Introducing Foods to Children as Infants (Of those who have a kid under 9 years)

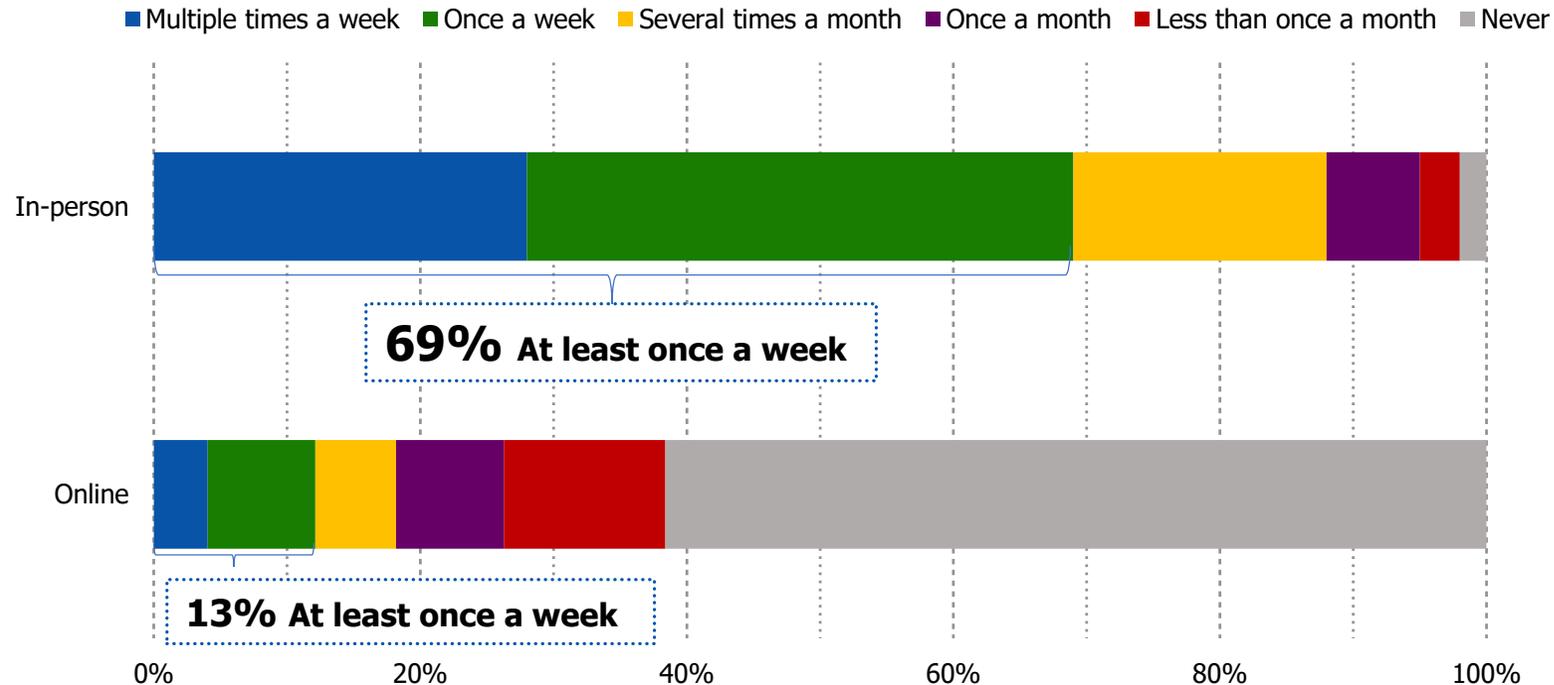


Q35: What was the biggest challenge that you experienced when starting to introduce foods to your children as infant(s)? (Of those who have children under 9 years, n=139)

Majority of Consumers Shop In-Person At Least Once a Week

Only one in eight consumers grocery shop online at least once a week

Grocery Shopping Patterns



77%

Of those with household income of \$75K+ grocery shop in person weekly, vs. 57% of those with less than \$35K

16%

Of those who followed a diet in that past year grocery shop online weekly, vs. 11% of those who didn't follow a diet

18%

Of consumers with children under 18 years shop online at least once a week, vs. roughly 11% of consumers without children under age 18

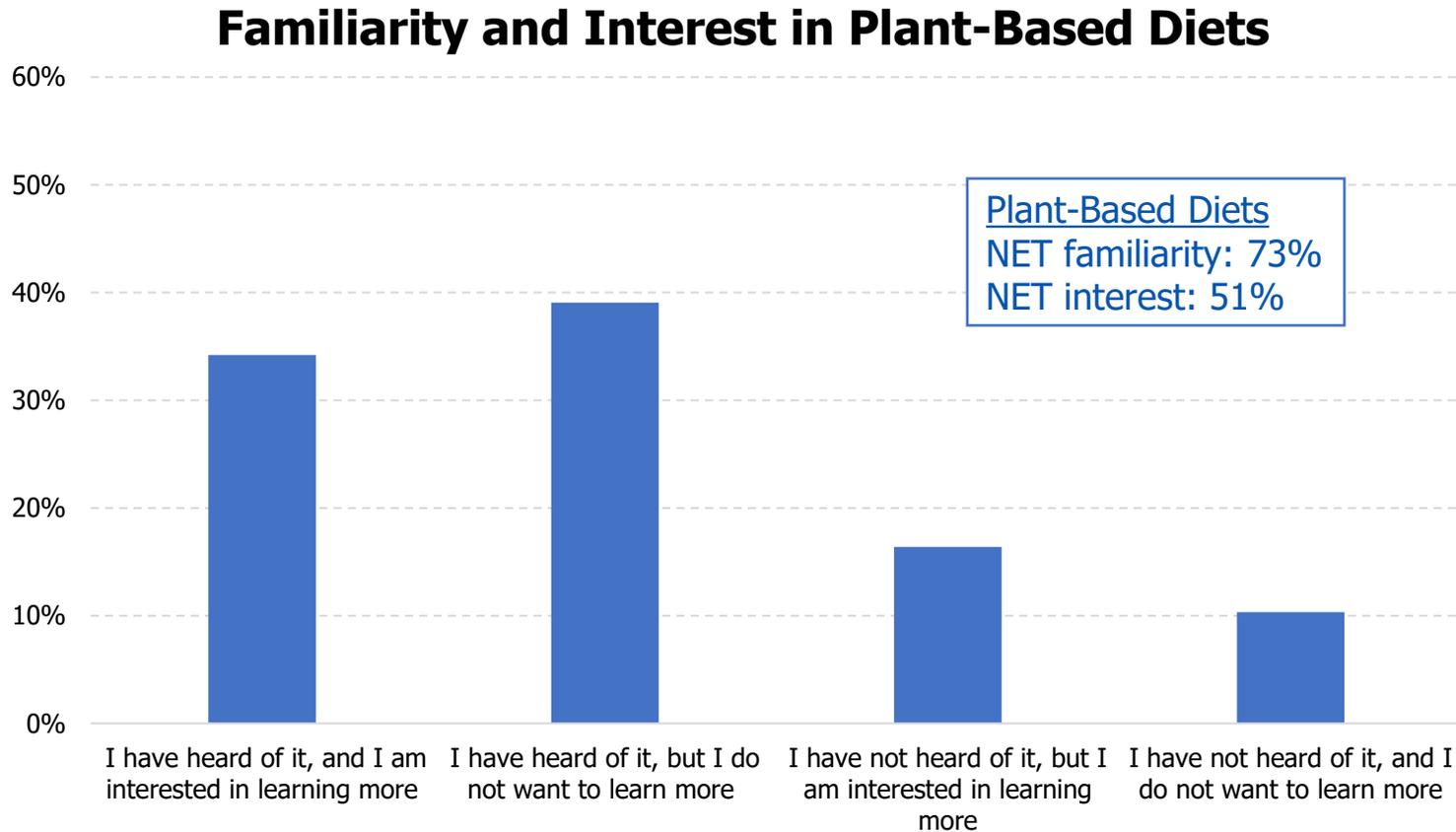
Q10: How often do you buy groceries...? (n=1,012)

A vibrant assortment of fresh vegetables including lettuce, purple cabbage, broccoli, zucchini, and carrots. The text "Plant-Based Diets" is overlaid in a large, bold, black font, underlined, and centered horizontally across the middle of the image.

Plant-Based Diets

Consumers are Familiar with Plant-Based Diets

Three quarters are familiar with plant-based diets and half are interested in learning more



82%
Of consumers who have tried a diet in the past say year that they have heard of plant-based diets compared to 68% who have not tried a diet

Q12: Which of the following best describes your familiarity and interest with "plant-based diets"? (n=1,012)

Consumers Split on Definition of Plant-Based

Vegan diets, those that are minimally processed, limited animal consumption and vegetarian diets most widely held definitions of plant-based

Definition of Plant-Based Diets *(Of those who have heard of plant-based diets)*

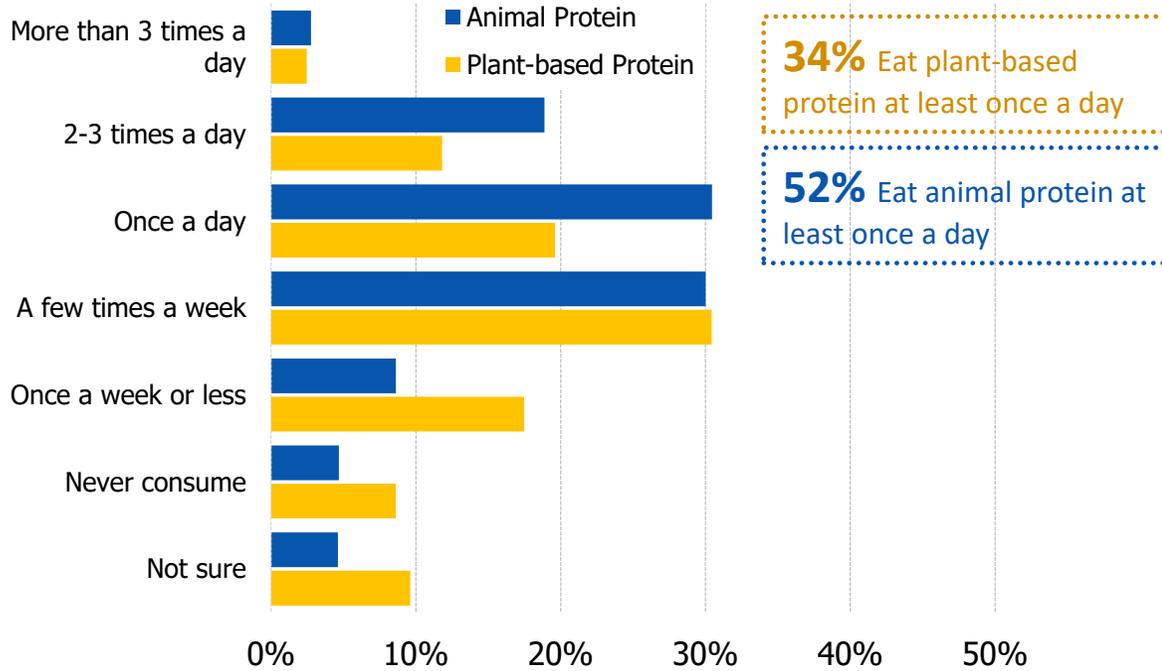


Q13: Which of the following best matches how you would define a "plant-based diet"? Please select only one answer. (Of those who have heard of plant-based diets, n=742)

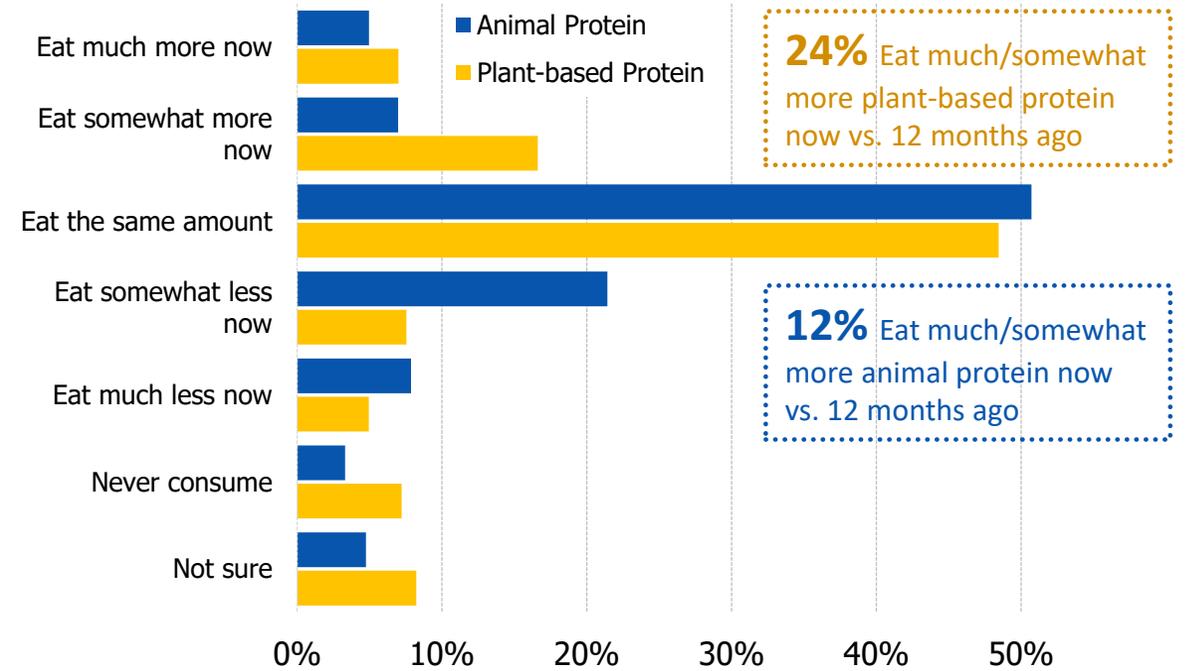
1 in 4 Eat More Plant-Based Protein this Year

Over one-third eat plant-based protein at least once a day

Consumption of Animal vs. Plant-Based Protein



Change in Consumption of Protein Sources in the Past 12 Months



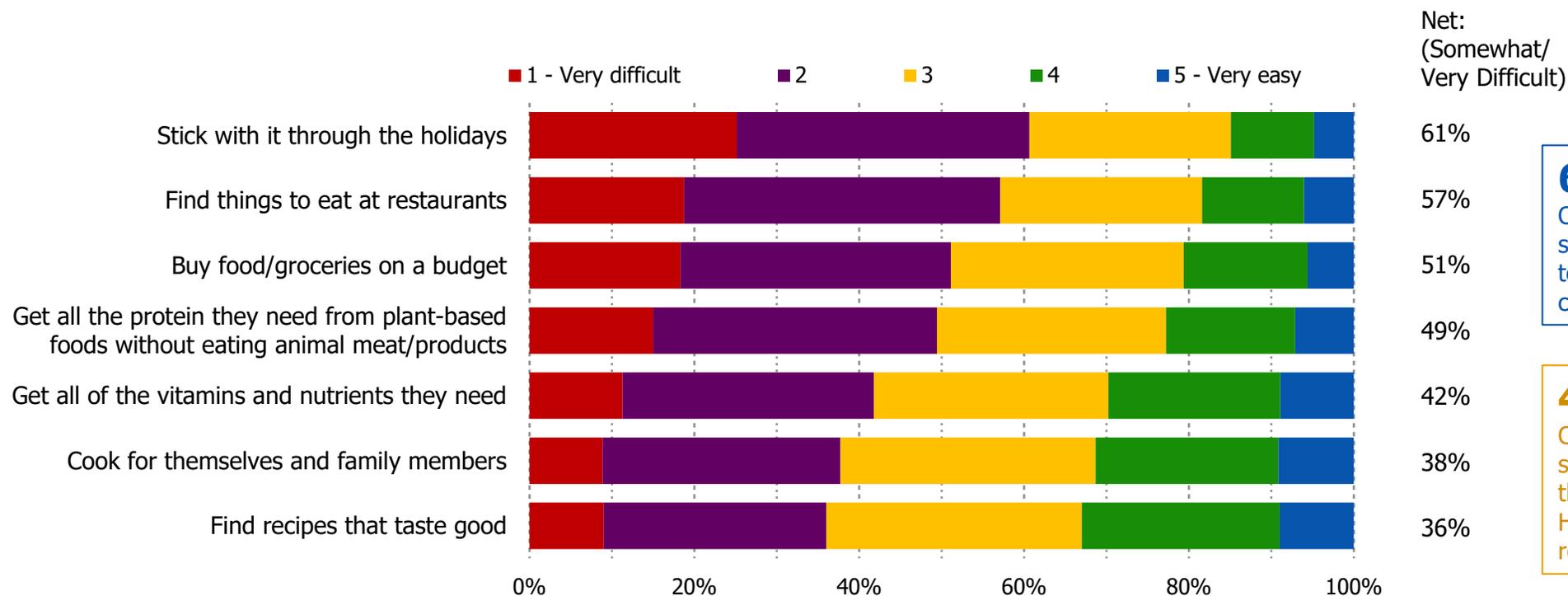
Q41: How often do you consume animal protein (e.g., meat, fish, poultry, dairy, eggs) and plant-based protein (e.g., soy/tofu, nuts, beans and legumes) on average? (n=1,012)

Q42: Thinking about the last 12 months, how has your consumption of animal protein (e.g., meat, fish, poultry, dairy, eggs) and plant-based protein (e.g., soy/tofu, nuts, beans and legumes) changed? (n=1,012)

Holidays and Eating Out Believed to Be Most Difficult Times to Follow Plant-Based Diets

Half also believe buying food on a budget or getting the protein needed would be difficult

Ease of Completing Activities for Those on Plant-Based Diets



68%
Of consumers age 65+ think it would somewhat/very difficult to find things to eat at a restaurant, vs. 55% of consumers younger than 35

41%
Of non-Hispanic whites think it would somewhat/very difficult to find recipes that taste good, vs. 26% and 28% of Hispanics and African Americans respectively

Q15: How easy do you think it would be for someone following a plant-based diet to...? (n=1,012)

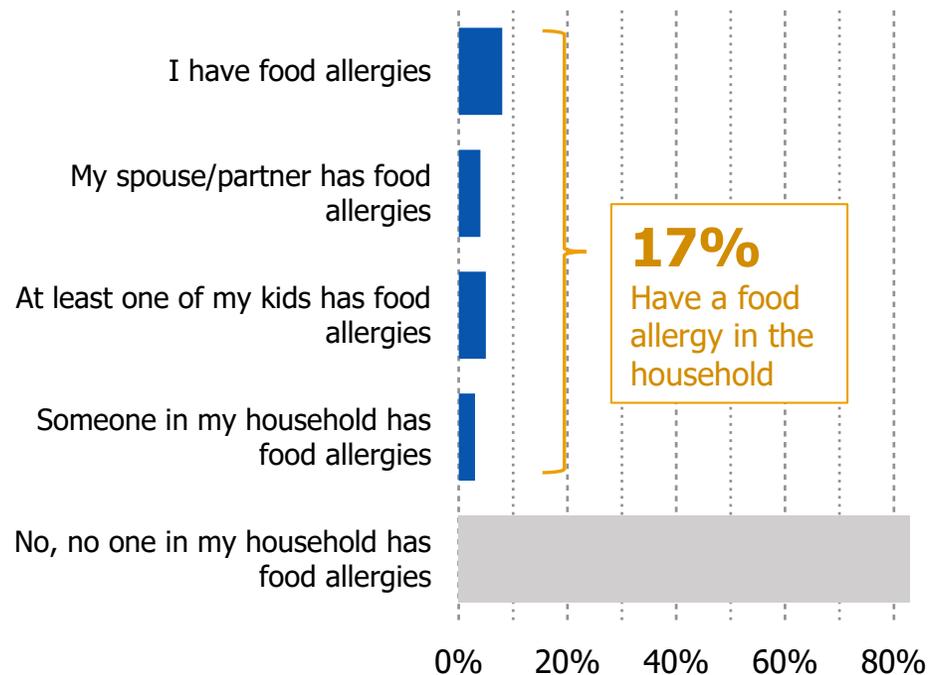


Food Allergies

1 in 6 Consumers Report Having a Food Allergy in the Household

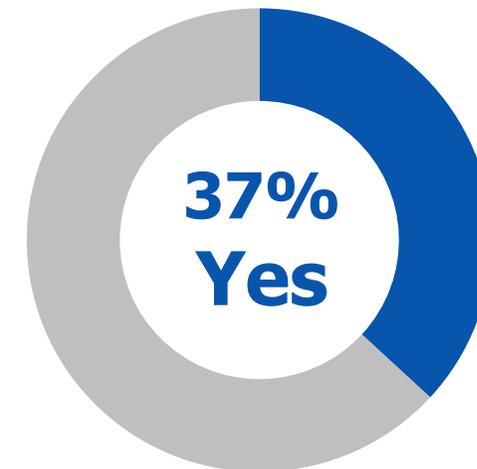
More consumers with children under 18 years report an allergy in the household

Allergies in Household



Allergies Outside of the Household

Other than the people in your household, do you know anyone personally who has a food allergy?



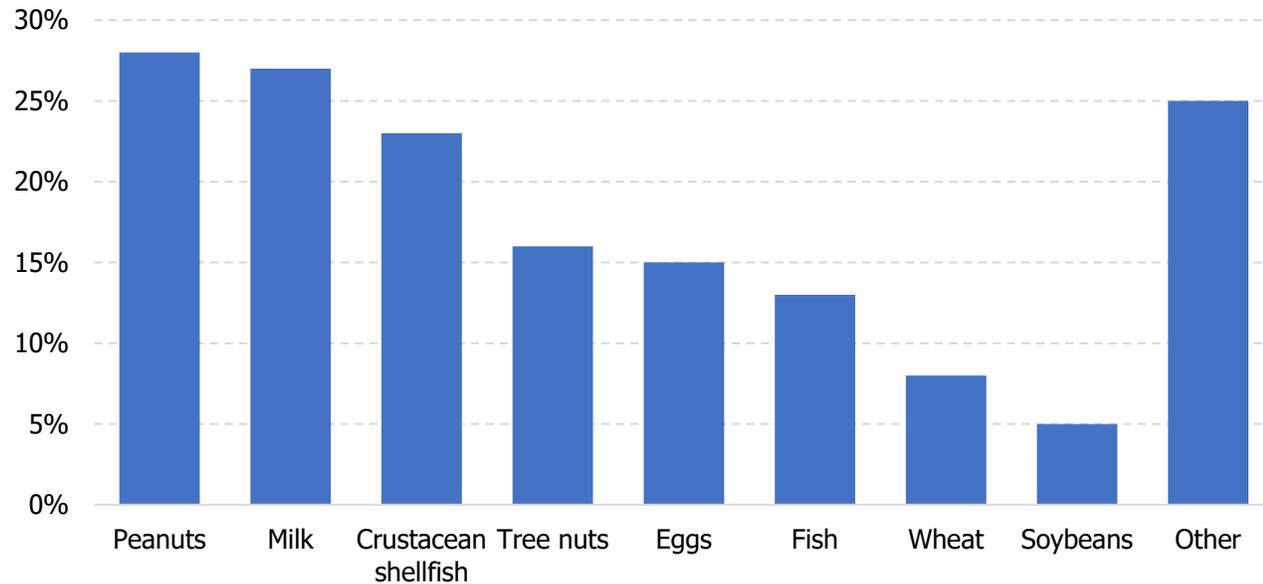
Q16: Do you or does anyone in your household have a doctor-diagnosed food allergy? Select all that apply. Please answer only about food allergies. Food allergies are immune system reactions that occur after eating a certain food and do not include conditions like lactose intolerance or sensitivity to gluten. (n=1,012)

Q18: Other than the people in your household, do you know anyone personally who has a food allergy? (n=1,012)

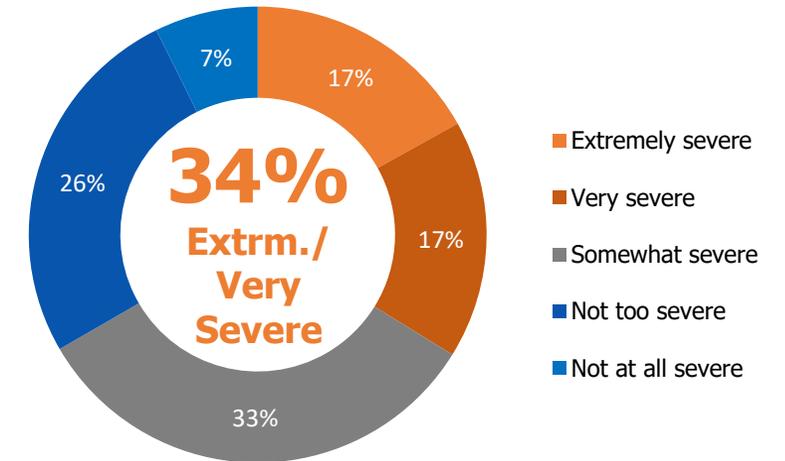
Peanut, Milk, and Shellfish Allergies are Most Common

One-third of consumers with an allergy in the household report that this allergy is extremely/very severe

Type of Allergy in Household
(Of those with an allergy in household)



Severity of Allergy
(Of those with an allergy in household)

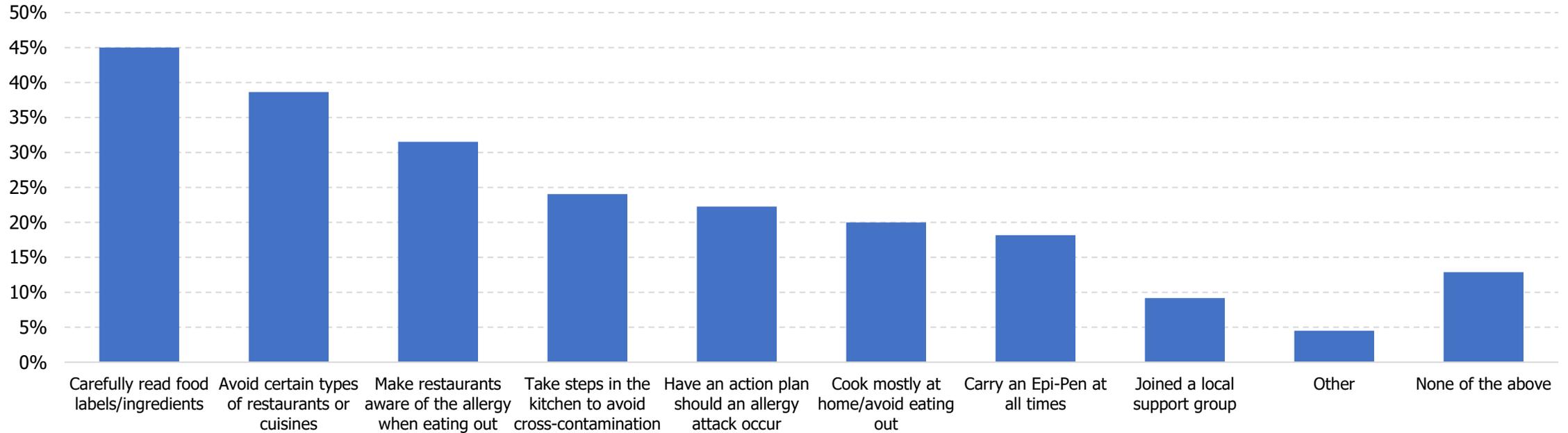


Q17: Which of the following doctor-diagnosed food allergies do the people in your household have? Select all that apply and answer for everyone in your household who has a food allergy. (Of those who have an allergy in household, n=167)
Q19: How severe is the most severe food allergy in your household? (Of those who have an allergy in household, n=167)

Reading Food Labels is Top Way to Manage Allergies

2 in 10 say they mostly avoid eating out entirely due to allergies

Ways Allergies Are Managed (Of those who have an allergy in the household)



Q20: Which of the following are ways that you/your household manages the food allergy/allergies present in your household? Select all that apply. (Of those who have an allergy in household, n=167)

Parents Unsure When to Introduce Peanuts

Slightly more than one-third of parents with children under 9 believe it is when children turn one year old

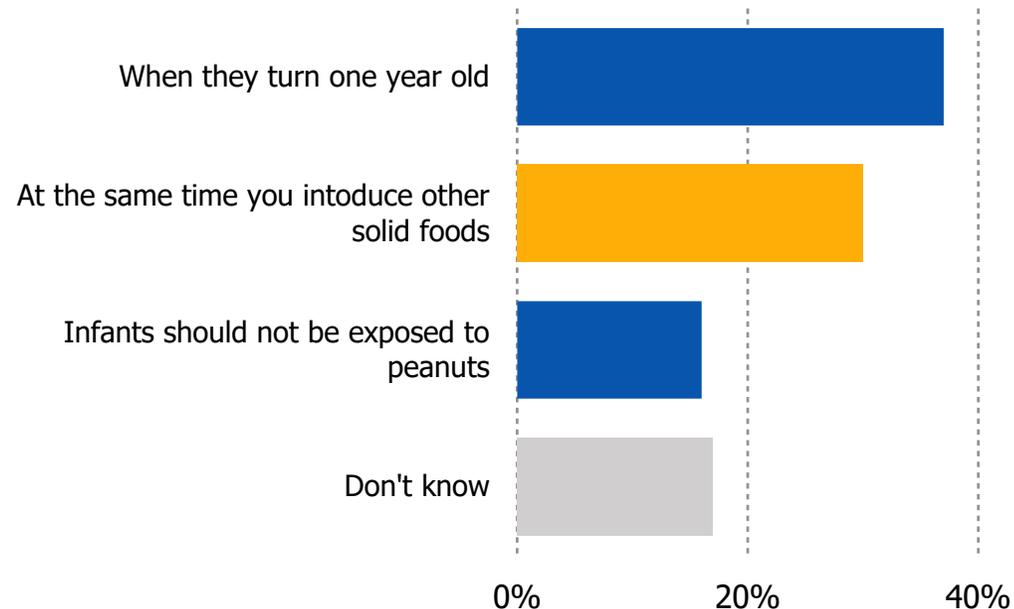
American Academy of Pediatrics Guideline:*

"...infants without eczema or any food allergy have age-appropriate peanut-containing foods freely introduced in the diet together with other solid foods and in accordance with family preferences and cultural practices."

**For an average infant*

When Parents Think Peanuts Should be Introduced to the Average Infant

(Of those who have children under 9 years)



57%

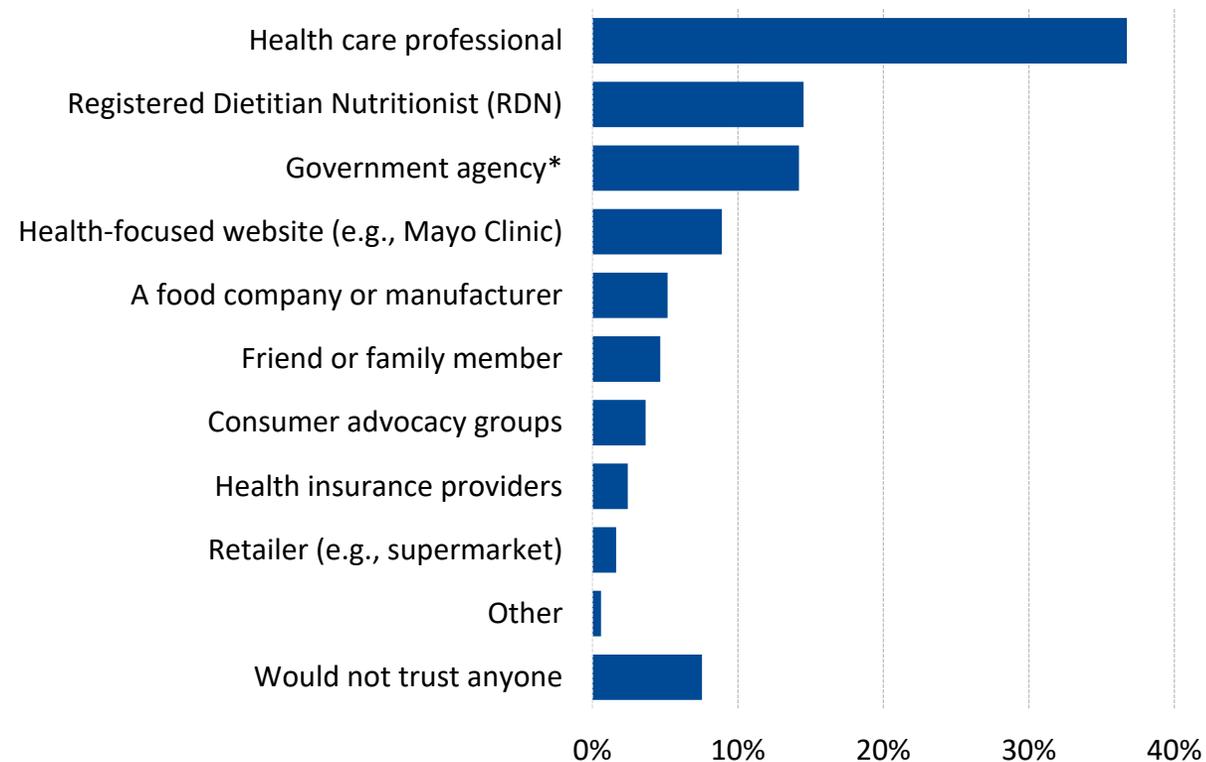
Of consumers with an income of <\$35k believe infants should be exposed when they turn one year old compared to 28% of consumers with an income of \$75K+

Q21: Which of the following do you think is the current American Academy of Pediatrics recommendation for when to safely expose infants to peanuts? Please answer regarding what you think the recommendation would be for the average infant, not one who has severe eczema and/or an egg allergy and would therefore be considered high risk for a peanut allergy. (Of those who have children under 9 years, n=139)

Doctors are Most Trusted Source for Allergy Info

Consumers with allergies in the household are no different compared to the overall population in terms of trusted sources

Most Trusted Source for Information on Food Allergies



*Response text abridged

Q61: Imagine that you or someone you know is living with one or more food allergies. Who would you trust the most to provide you with information on food allergies? Select only one. (n=1,012)



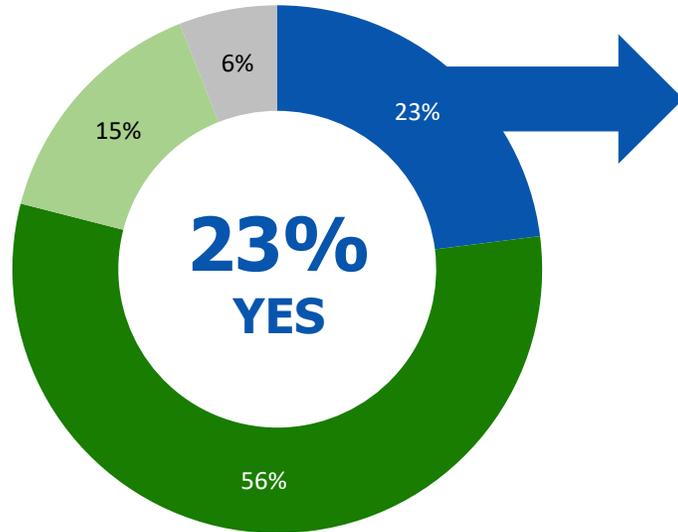
Nutrients and Desired Health Benefits

1 in 4 Consumers Seek Health Benefits From Food

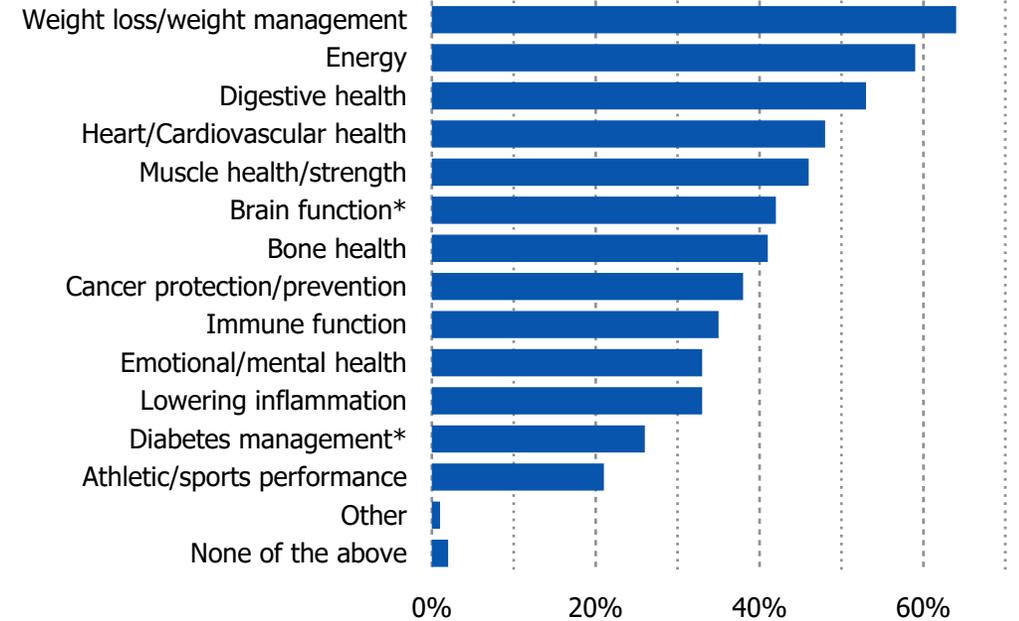
Weight loss, energy, and digestive health are the most sought-after benefits

Seek Health Benefits from Foods?

- Yes, I actively seek out foods or follow a diet for health benefits
- No, but I try to eat healthy in general
- No, health benefits are not a factor in my food choices
- Not sure



Top Sought After Health Benefits (Of those who seek health benefits from foods)



*Response text abridged

Q36: Do you seek out certain foods or follow a particular diet because of the health benefits that those foods/diet provide? (n=1,012)

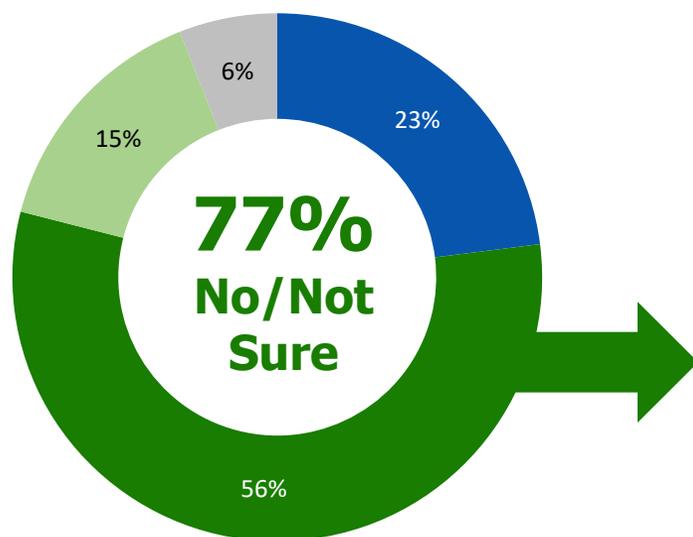
Q39: Which of the following health benefits are you seeking to get from foods or nutrients? Select all that apply. (Of those who seek health benefits from foods, n=247)

Interest in Heart Health, Weight Loss, Energy Benefits

Of those not actively seeking out health benefits from food, women are more interested in weight loss than men while older consumers are more interested in heart/cardiovascular health than their younger counterparts

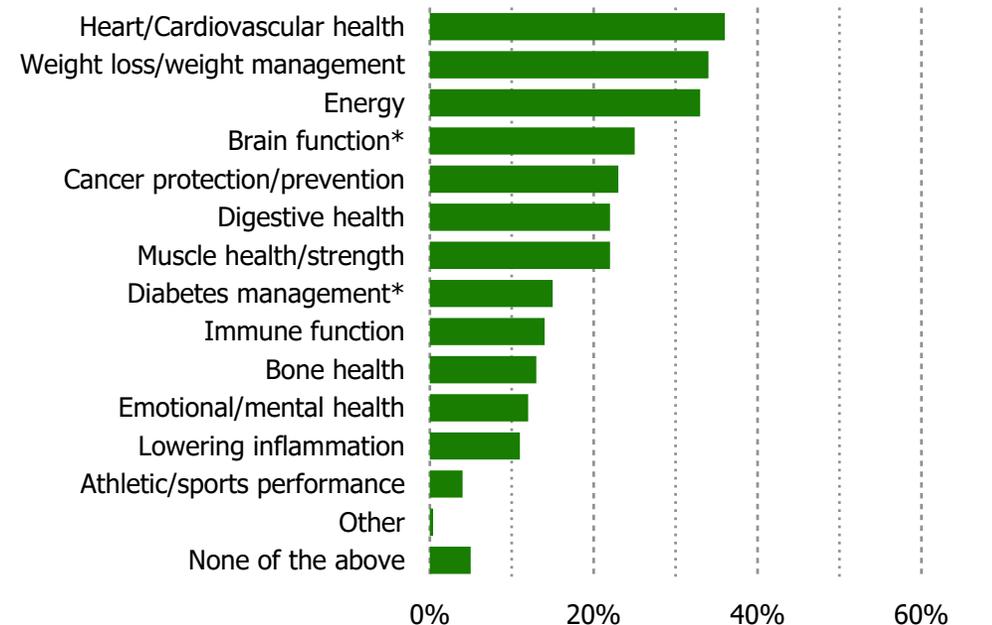
Seek Health Benefits from Foods?

- Yes, I actively seek out foods or follow a diet for health benefits
- No, but I try to eat healthy in general
- No, health benefits are not a factor in my food choices
- Not sure



Interest in Certain Health Benefits

(Of those who do not seek health benefits from food)



*Response text abridged

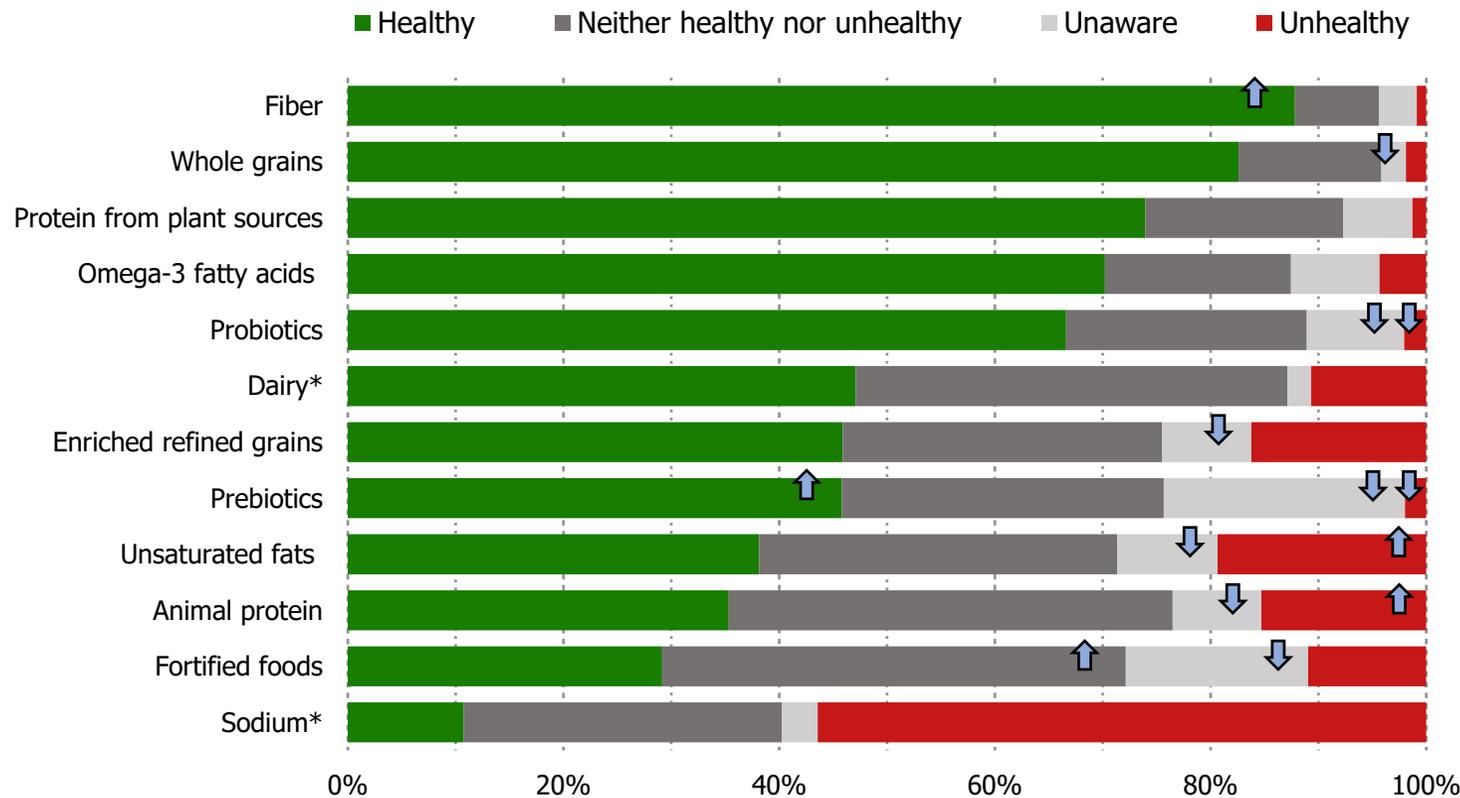
Q36: Do you seek out certain foods or follow a particular diet because of the health benefits that those foods/diet provide? (n=1,012)

Q40: Which of the following health benefits would you be most interested in getting from foods or nutrients? Please select the top 3 benefits (Of those who do not seek health benefits from foods, n=765)

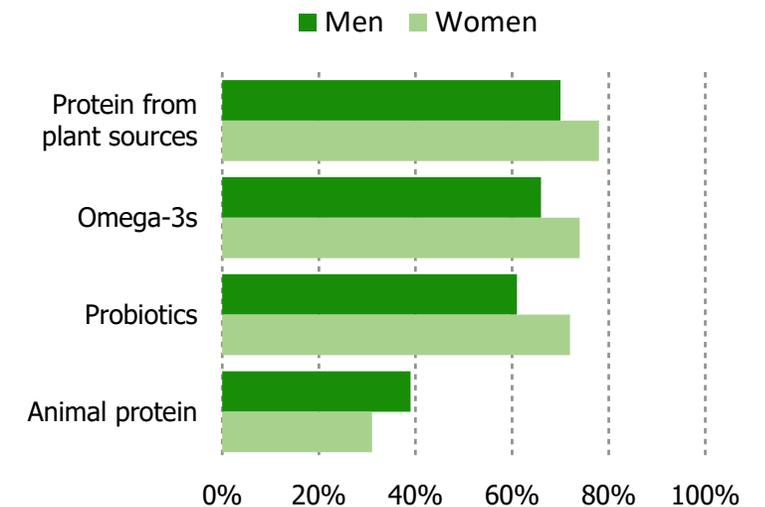
Fiber and Prebiotics Perceived as More Healthful this Year

As was seen in 2018, fiber, whole grains and protein from plant sources remain at the top

Perceived Healthfulness of Foods



% Healthy by Gender

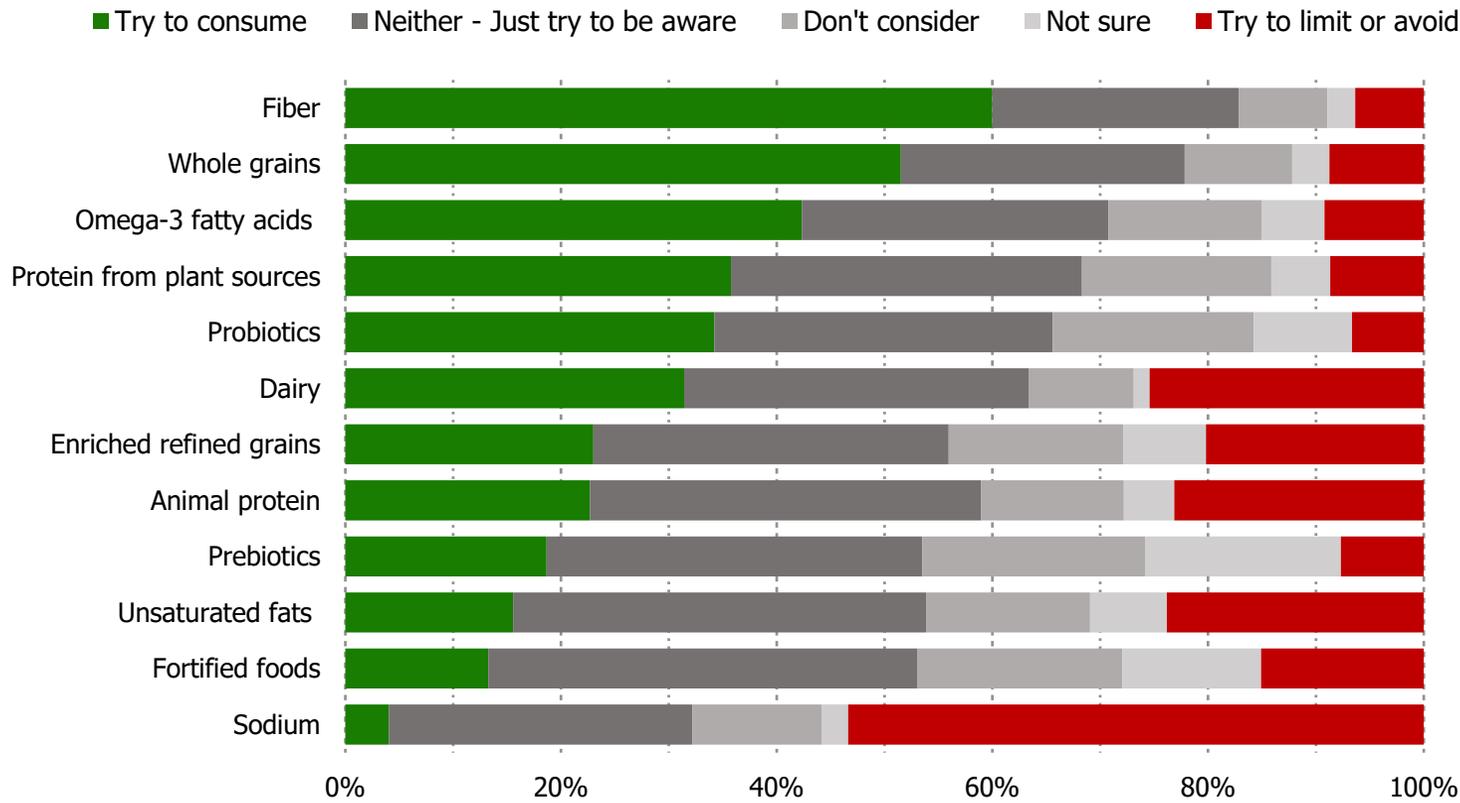


Q37: How would you rate the healthfulness of each of the following? (n=1,012)
 *Indicates new addition to list starting 2019

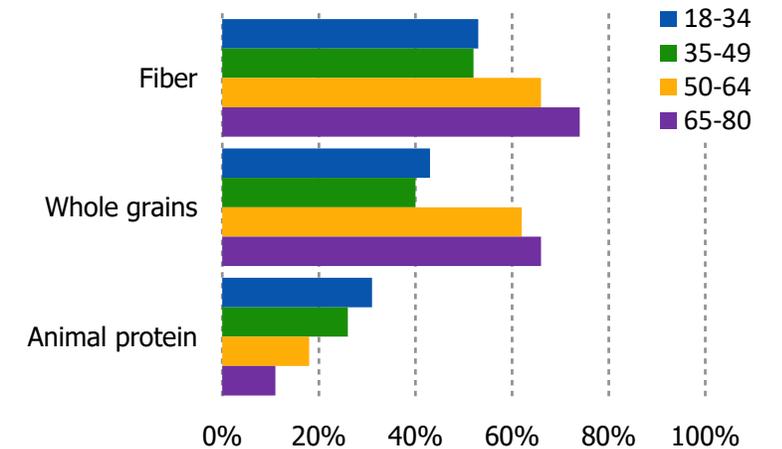
Desired Consumption Mirrors Perceived Healthfulness

Older consumers more often than younger ones indicate that they try to consume fiber and whole grains

Consume or Avoid the Following



% Try to Consume by Age

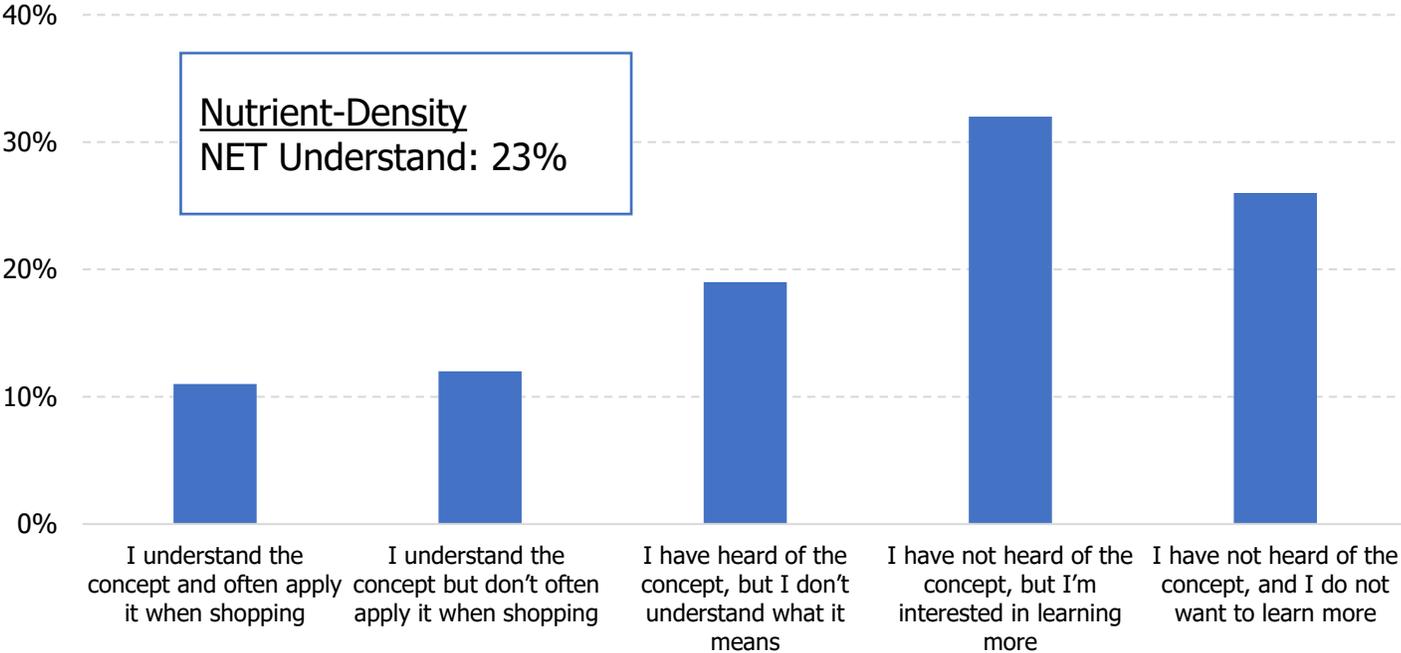


Q38: Do you generally try to consume or avoid the following? (n=1,012)

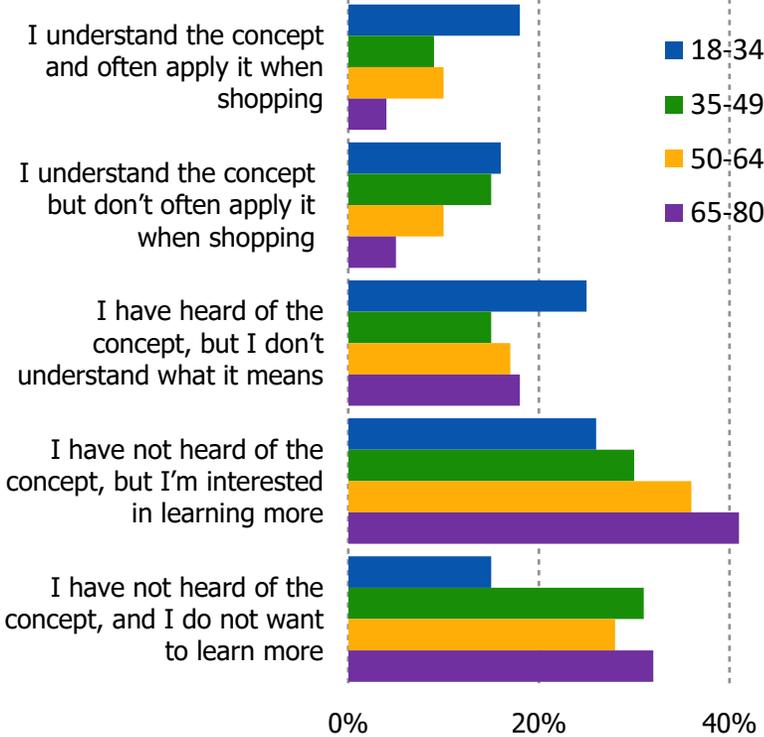
1 in 4 Understand “Nutrient-Density”

One-third have not heard of it but want to learn more; younger consumers are more familiar with the concept

Familiarity and Interest in Nutrient-Density



Familiarity and Understanding by Age



Q43: Which of the following best describes your familiarity and interest in the concept of "nutrient density"? (n=1,012)

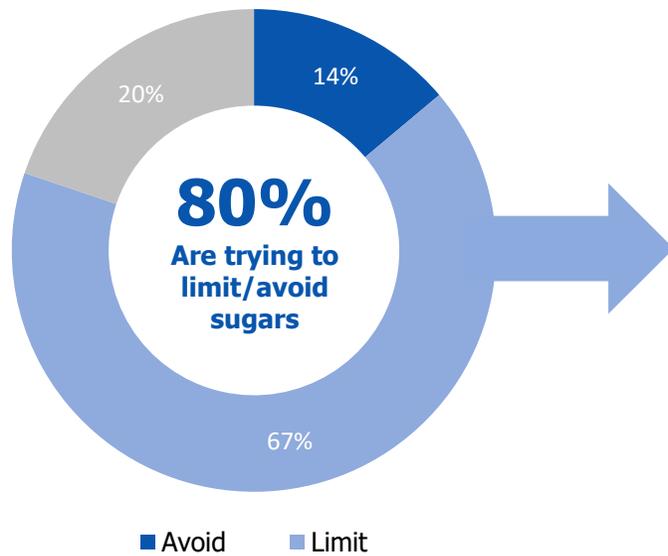


Sugars and Sweeteners

Consumers Take Multiple Actions to Limit Sugar

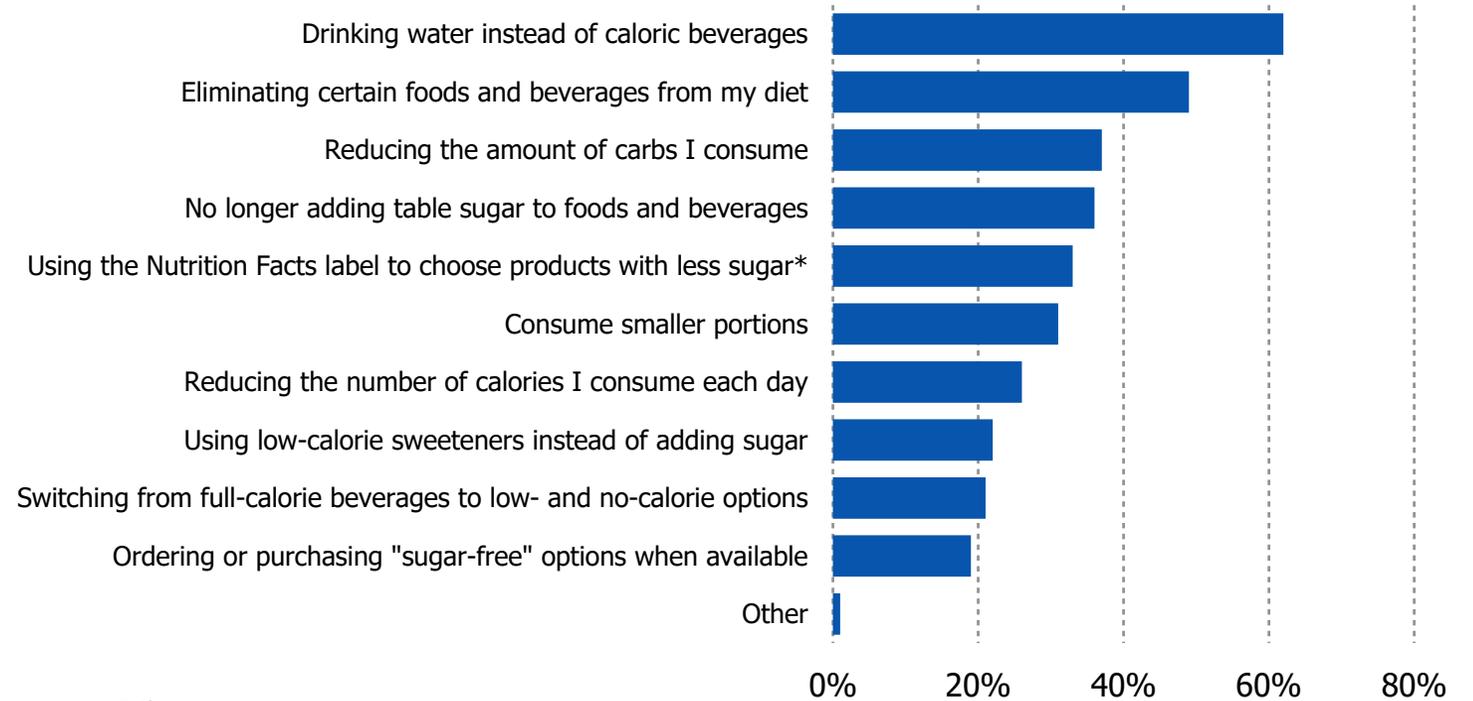
A higher percentage of 65+ consumers use the Nutrition Facts Panel to choose products with lower sugar and have stopped adding sugar to products

Limiting/Avoiding Sugars in Diet



Actions Taken to Limit/Avoid Sugars

(Of those limiting/avoiding sugars)



Q44: Are you trying to limit or avoid sugars in your diet? (n=1,012)

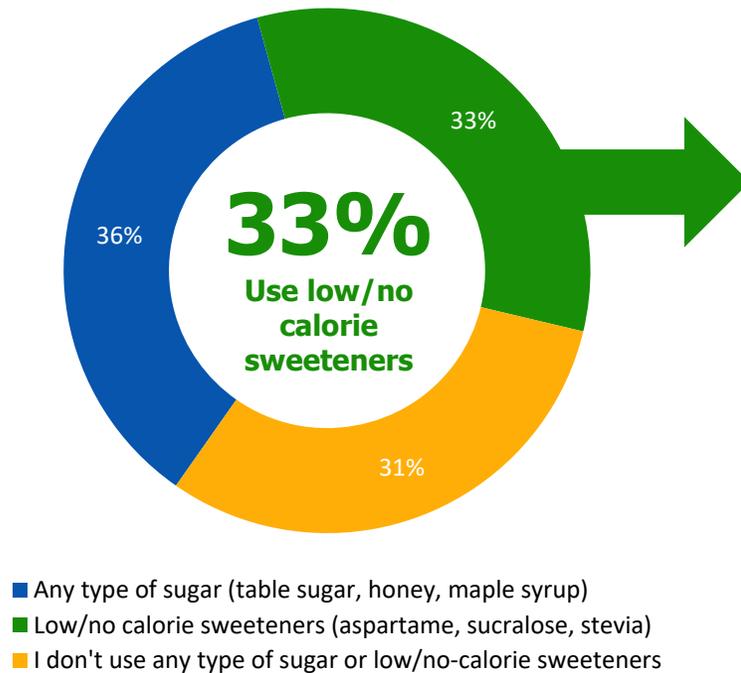
Q45: What action(s) are you taking to limit or avoid sugars? Check all that apply. (Of those limiting/avoiding sugars, n=819)

*Response text has been abridged

3 in 10 Say They Don't Sweeten Foods or Beverages

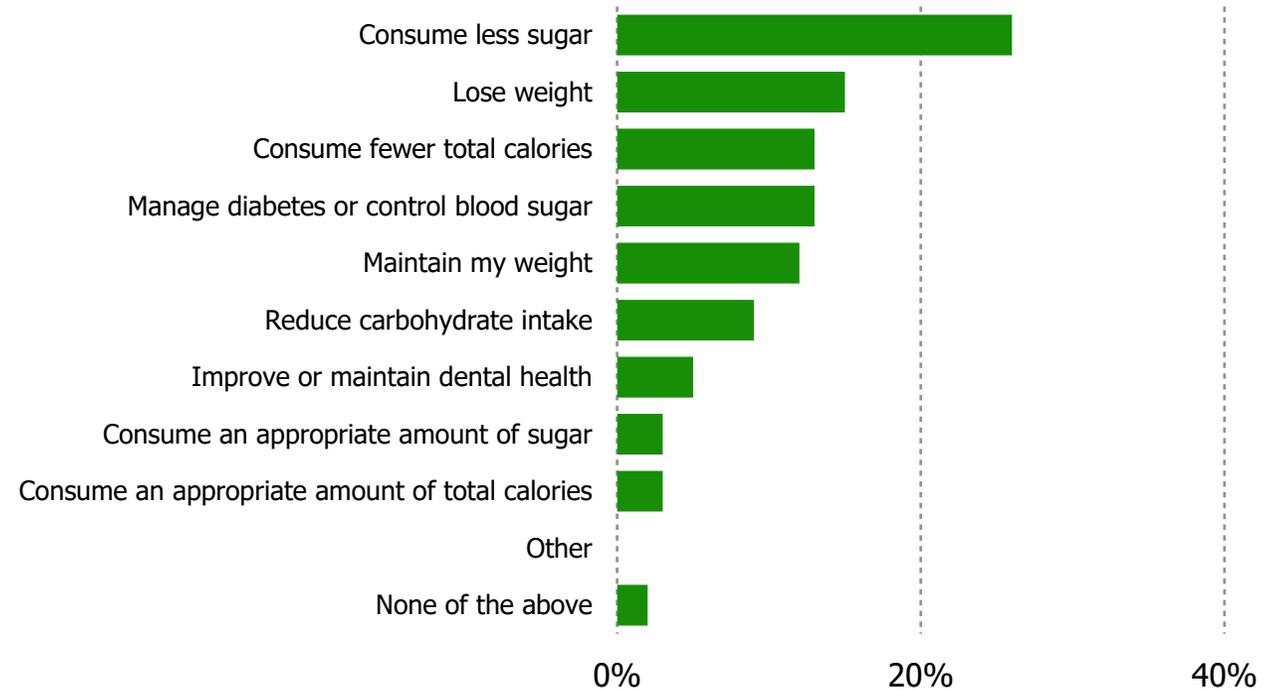
Consumers choose low/no-calorie sweeteners to consume less sugar, lose weight, consume fewer calories, and manage diabetes

Sweeteners Likely to Use



Perceived Benefits of Using Low/No-Calorie Sweeteners

(Of those who use low/no-calorie sweeteners)



Q46: Which of the following are you more likely to use to sweeten foods and/or beverages? (n=1,012)

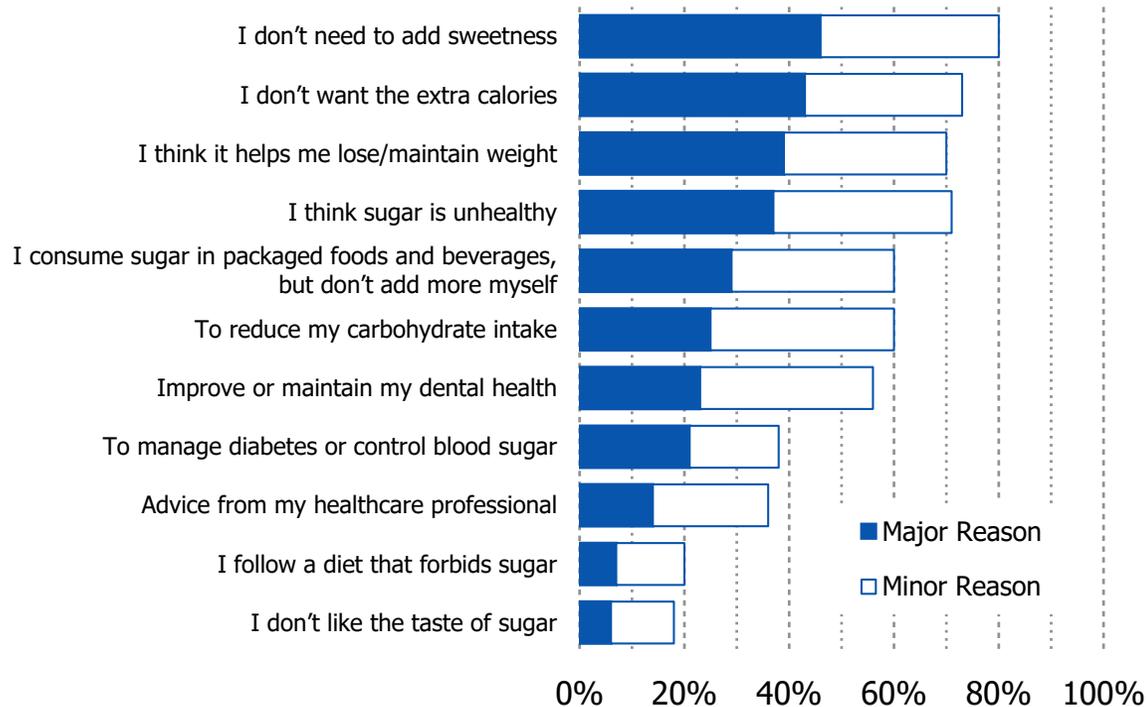
Q49: Which of the following, if any, do you believe consuming low/no-calorie sweeteners helps you do? (Select top answer.) (Of those who use low/no-calorie sweeteners, n=325)

Multiple Reasons Why Consumers Don't Sweeten their Foods and Beverages

Consumers who avoid both sugars and low/no-cal sweeteners think that both can be unhealthy

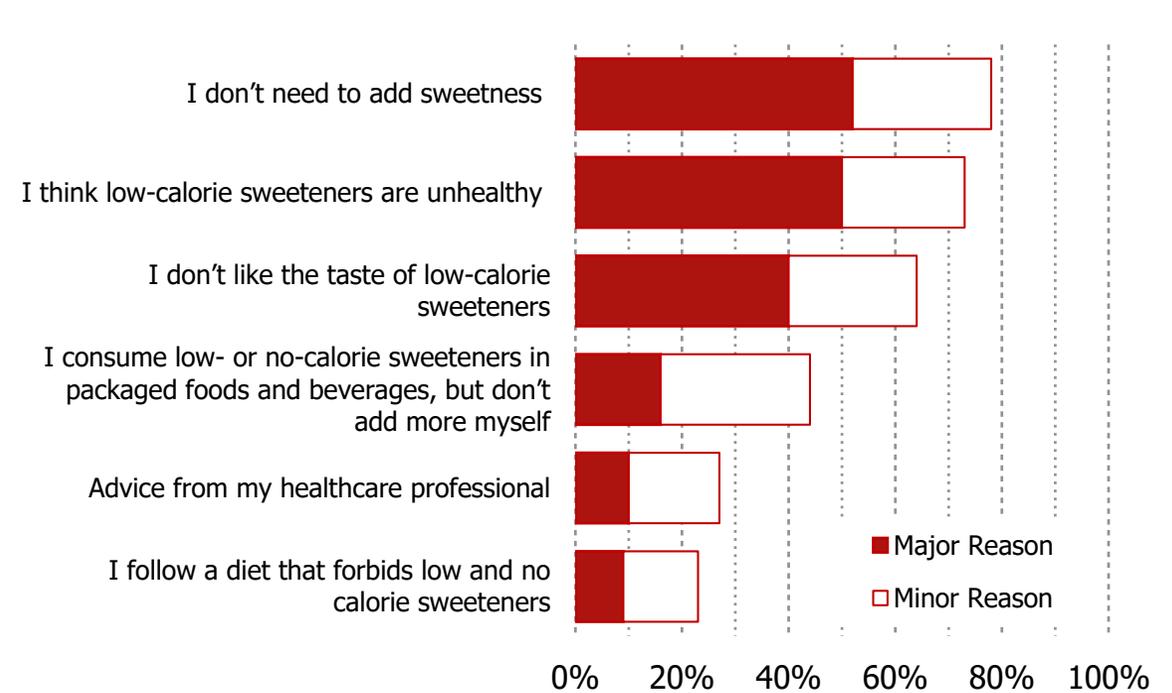
Reasons For Not Using Sugar

(Of those who don't use sugar or low/no-calorie sweetener)



Reasons For Not Using Low/No-Calorie Sweetener

(Of those who don't use sugar or low/no-calorie sweetener)



Q47: Why don't you use any type of sugar (ex. Table sugar, honey, maple syrup) to sweeten your foods and/or beverages? (Of those who don't use sugar or low/no-calorie sweeteners, n=331)

Q48: Why don't you use any type of low or no calorie sweeteners (ex. Aspartame, Sucralose, stevia leaf extract) to sweeten your foods and/or beverages? (Of those who don't use sugar or low/no-calorie sweetener, n=331)

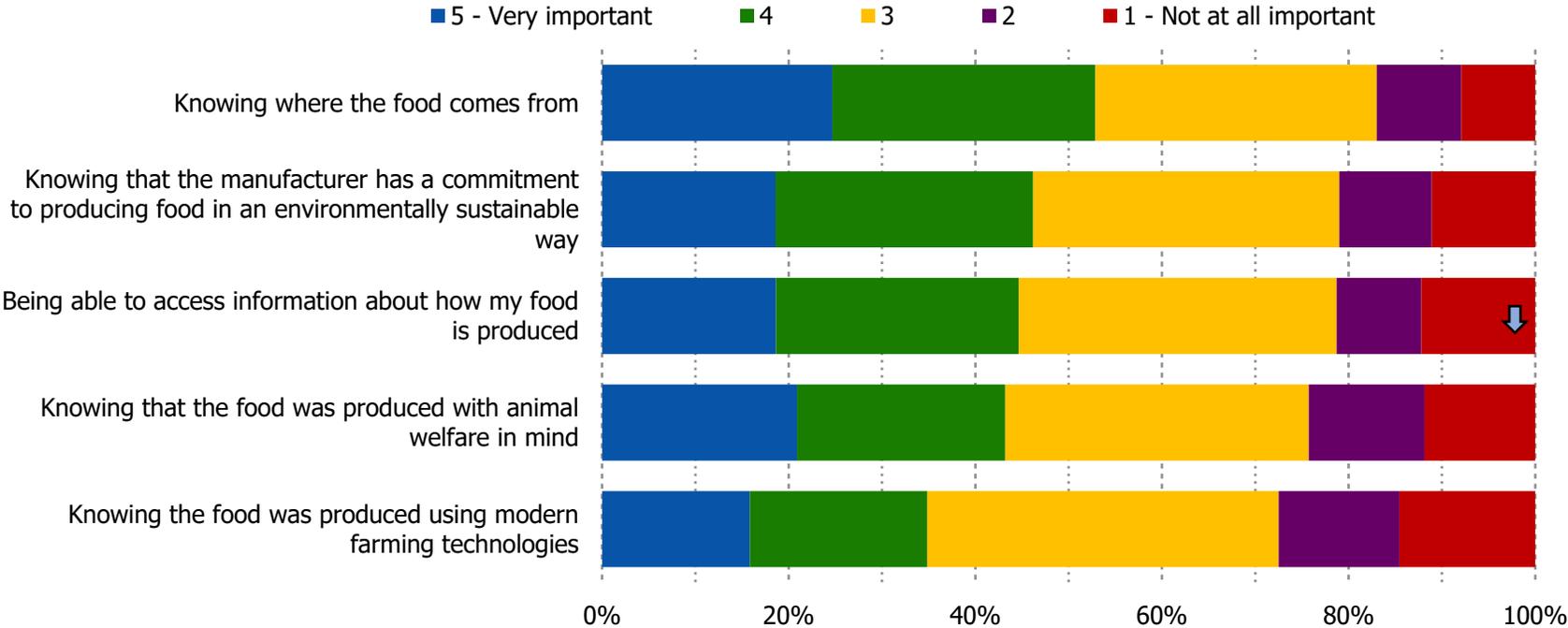
A vibrant assortment of fresh vegetables including lettuce, purple cabbage, broccoli, zucchini, and carrots. The text "Food Production" is overlaid on the image.

Food Production

Knowing Where Food Comes From is Important

More than half say knowing where their food comes from is highly important; nearly half say the same about knowing a manufacturer has a commitment to environmental sustainability

Important Factors When Purchasing Food



59% and 58%
Of Hispanics and African Americans, respectively, believe it is very/somewhat important to know that their food is produced in an environmentally sustainable way compared to 41% of non-Hispanic whites

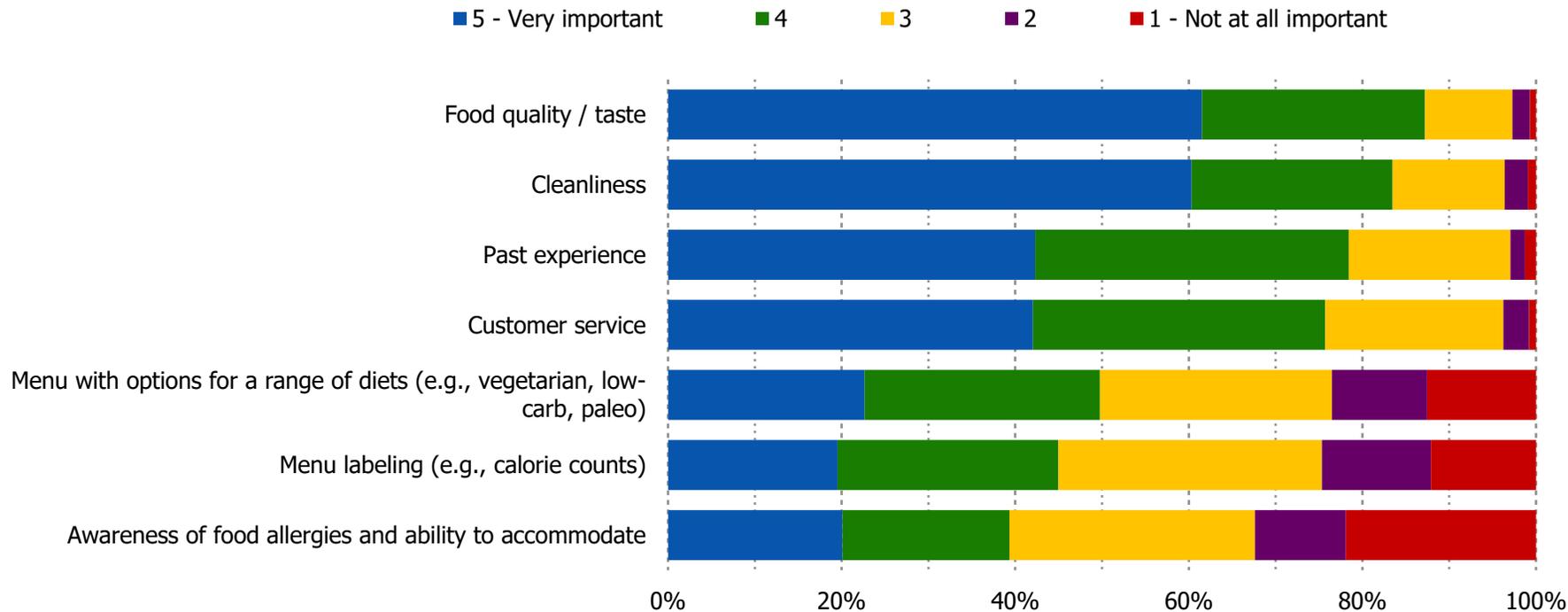
49% and 52%
Of consumers from the South and West respectively believe it is very/somewhat important to know that their food is produced in an environmentally sustainable way compared to 38% of consumers from the Midwest

Q50: How important are the following factors in your decision to purchase a food or beverage? (n=1,012)

Taste/Cleanliness are Key for Restaurant Choice

Past experience and customer service ranked below these factors

Important Factors When Choosing a Restaurant or Cafeteria



Multiple factors are **more important to older consumers** than younger ones when choosing where to eat out

4 of 7 factors are **more important to women** than men when choosing where to eat out

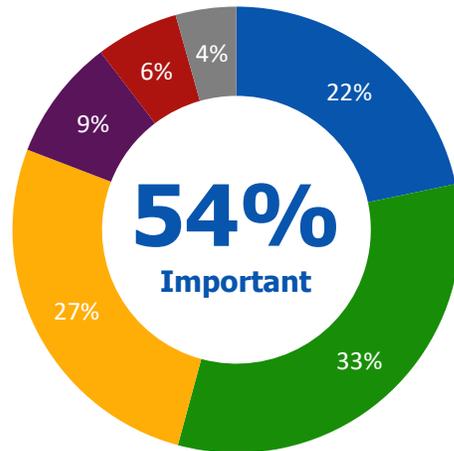
66% Of consumers with an allergy in the household say awareness of food allergies and ability to accommodate is very/somewhat important compared to 34% of consumers without allergies in the household

Q51: How important are the following factors when it comes to choosing a restaurant or cafeteria? (n=1,012)

Over Half Say Sustainability is Important

Labeled as being locally grown top indicator for perceived environmental sustainability

Importance of Environmental Sustainability in Food Products Purchased



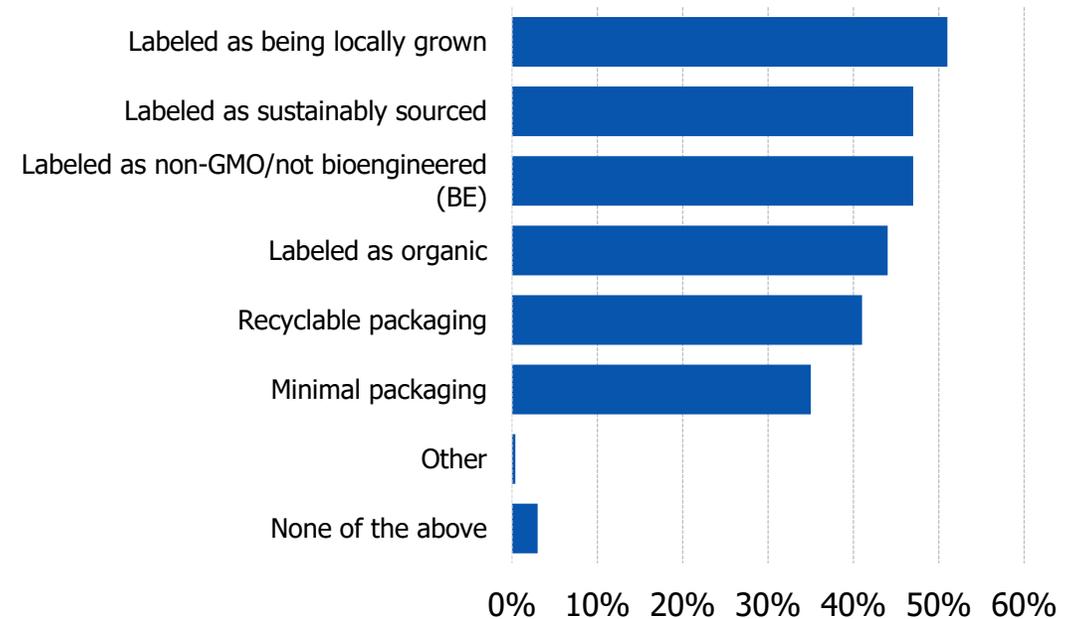
- Very important
- Somewhat important
- Neither important nor unimportant
- Not very important
- Not at all important
- Don't know enough

68%
Of African Americans say it is very/somewhat important to them vs. 52% of non-Hispanic whites

59%
Of women say it is very/somewhat important to them vs. 49% of men

Perceived Factors to Know if a Product is Produced in an Environmentally Sustainable Way

(Of those who say it's important their food be produced sustainably)



Q52: How important is it to you that the food products you purchase or consume are produced in an environmentally sustainable way? (n=1,012)

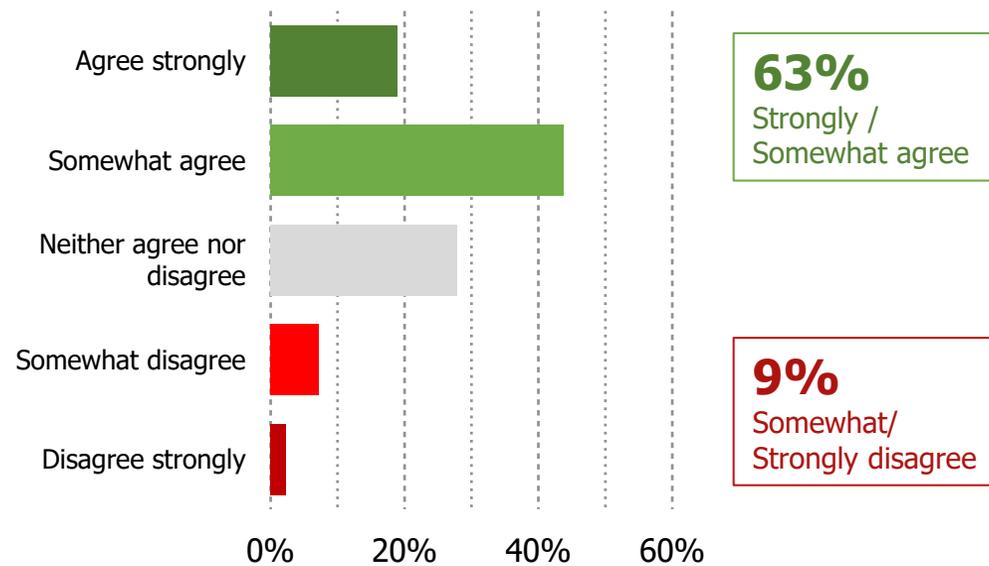
Q53: You mentioned that it is important to you that food products are produced in an environmentally sustainable way. When shopping for foods and beverages, which of the following do you look for as a way to know that a product is produced in an environmentally sustainable way? Select all that apply. (Of those who say it's important their food be produced sustainably, n=554)

Majority Say It's Hard to Know Whether Food Choices are Environmentally Sustainable

Consumers with a higher income are more likely to agree that it is hard to know whether food choices are environmentally sustainable

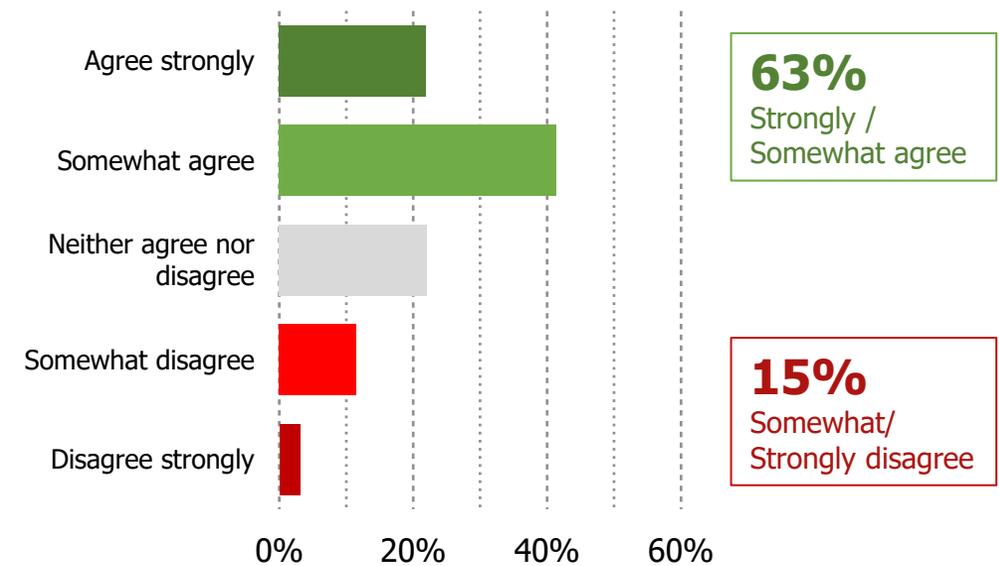
Agree or Disagree:

"It is hard for consumers to know whether the food choices they make are environmentally sustainable"



Agree or Disagree:

"If it was easier to know whether my food choices were environmentally sustainable, it would have a greater influence on the choices I make"
(Of those who agree it is hard to know)



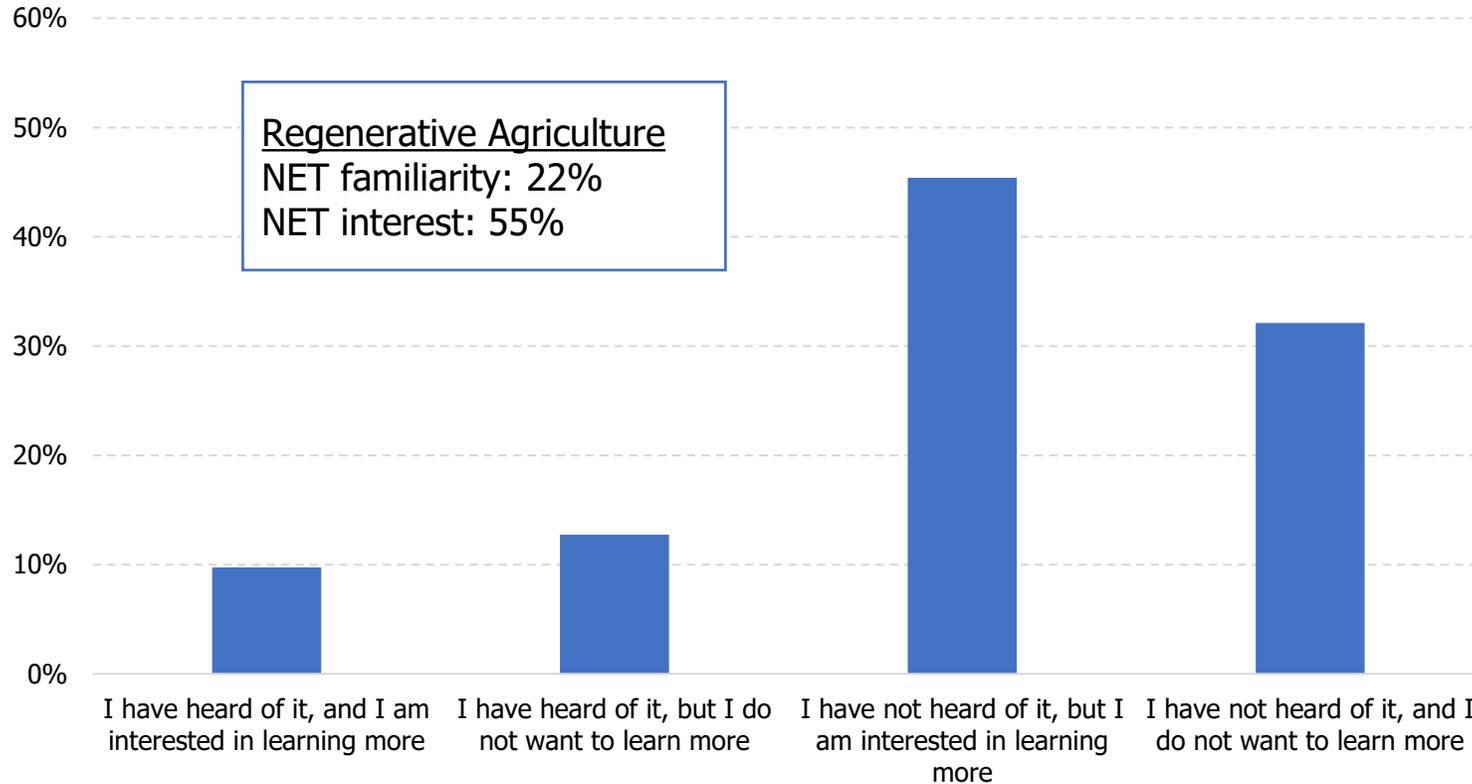
Q4: Do you agree or disagree with the following statement? "It is hard for consumers to know whether the food choices they make are environmentally sustainable." (n=1,012)

Q5: Do you agree or disagree with the following statement? "If it was easier to know whether my food choices were environmentally sustainable, it would have a greater influence on the choices I make." (Of those who agree it is hard to know, n=651)

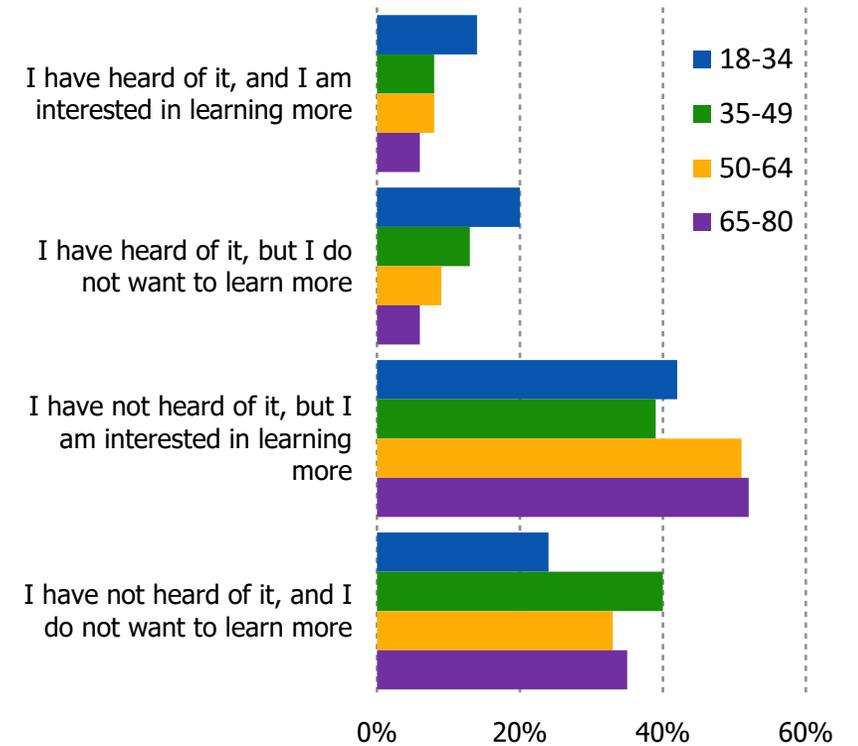
Fewer Than 1 in 4 Have Heard of Regenerative Ag

While it is somewhat unfamiliar with consumers, over half are interested in learning more

Familiarity and Interest in Regenerative Agriculture



% by Age

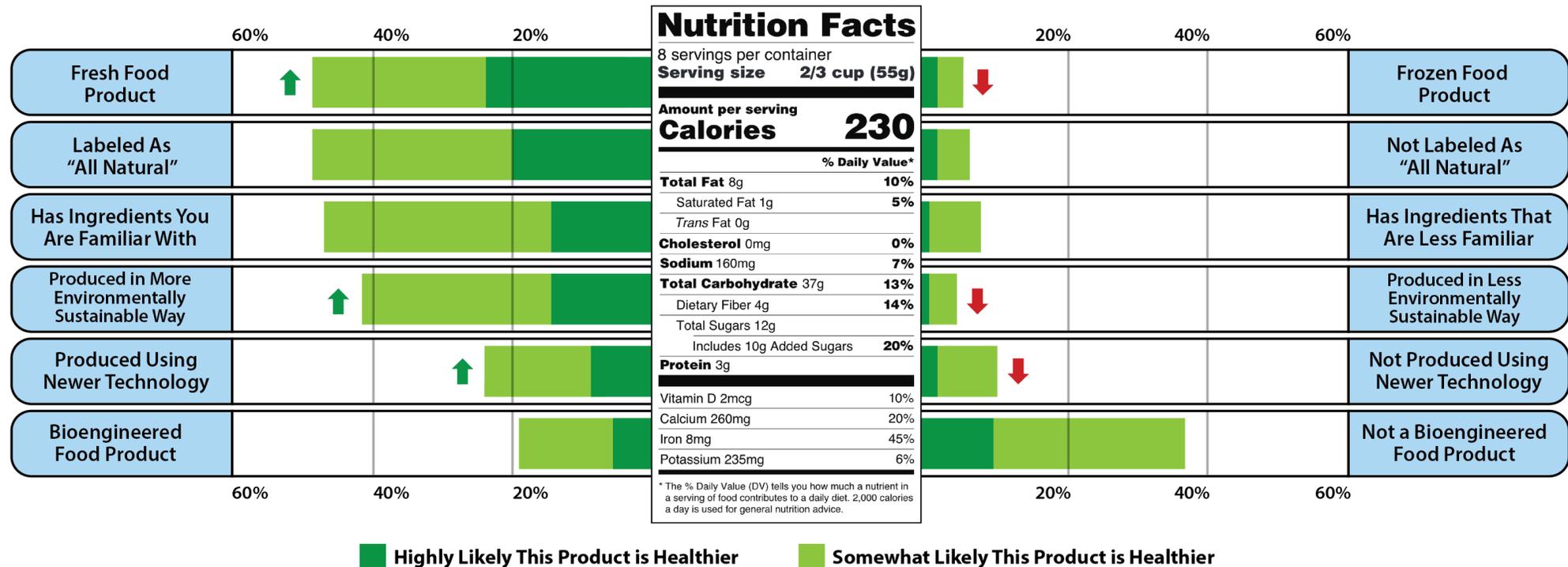


Q54: Which of the following best describes your familiarity and interest in the practices of "regenerative agriculture"? (n=1,012)

Same Nutrition Information, but Differences in Perceived Healthfulness

Despite identical nutritional info, freshness, “all natural” description, familiarity, and environmental sustainability influence perception

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

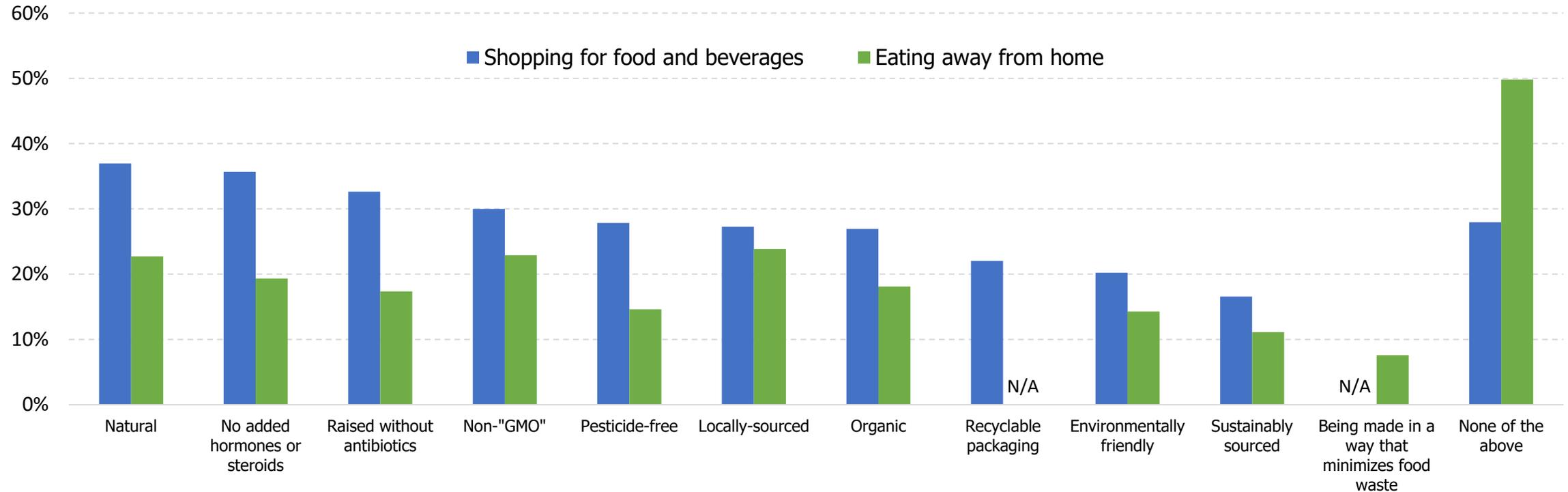


Q11: Imagine you came across two food products that had the exact same Nutrition Facts panel. Would any of the following details lead you to believe that one of the products was more likely to be healthier? (n=1,012)

Labeling is More Important When Shopping

Half of consumers say that none of the labeling information is important when eating away from home

Influence of Labels on Purchasing Behavior



Q55: Which of the following, if any, do you do on a regular basis (that is, most times when you shop for foods and beverages)? Select all that apply. Buy foods and beverages because they are advertised on the label as...(Split Sample A, n=519)
Q56: Which of the following, if any, do you do on a regular basis (that is, most times when you eat away from home)? Select all that apply. Eat at restaurants because they advertised their foods and beverages as...(Split Sample B, n=493)

Slight Decrease in Confidence Since 2018

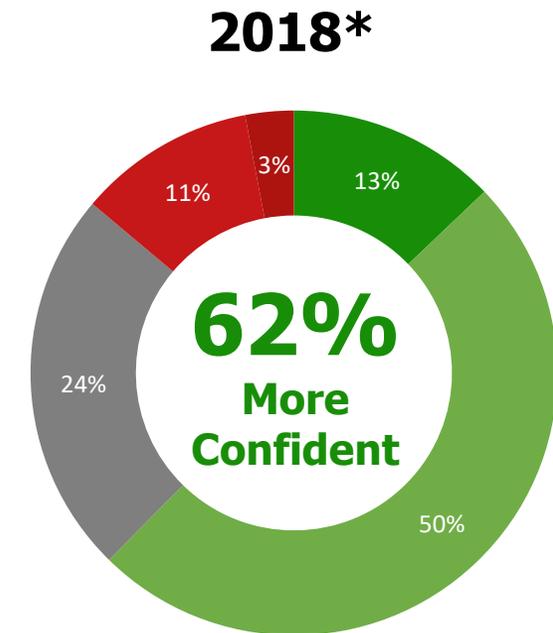
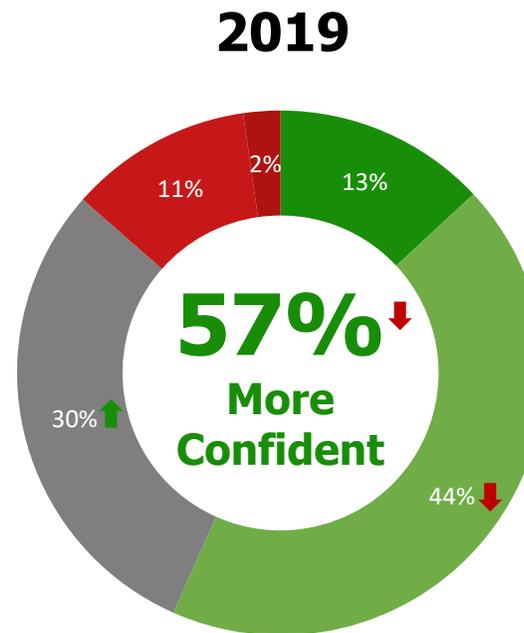
Although overall confidence is down slightly, the movement is from “somewhat more confident” to “no change”

Change in Confidence Since Regulation of Antibiotics

Two years ago, the US Food and Drug Administration 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 in purchasing meat, poultry, egg, and milk products? Are you...?

- A lot more confident
- Somewhat more confident
- No change
- Somewhat less confident
- A lot less confident



Q57: Two years ago, the US Food and Drug Administration 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 in purchasing meat, poultry, egg, and milk products? Are you...? (n=1,012)

*Question text changed in 2019 to add that the regulation was implemented two years ago.

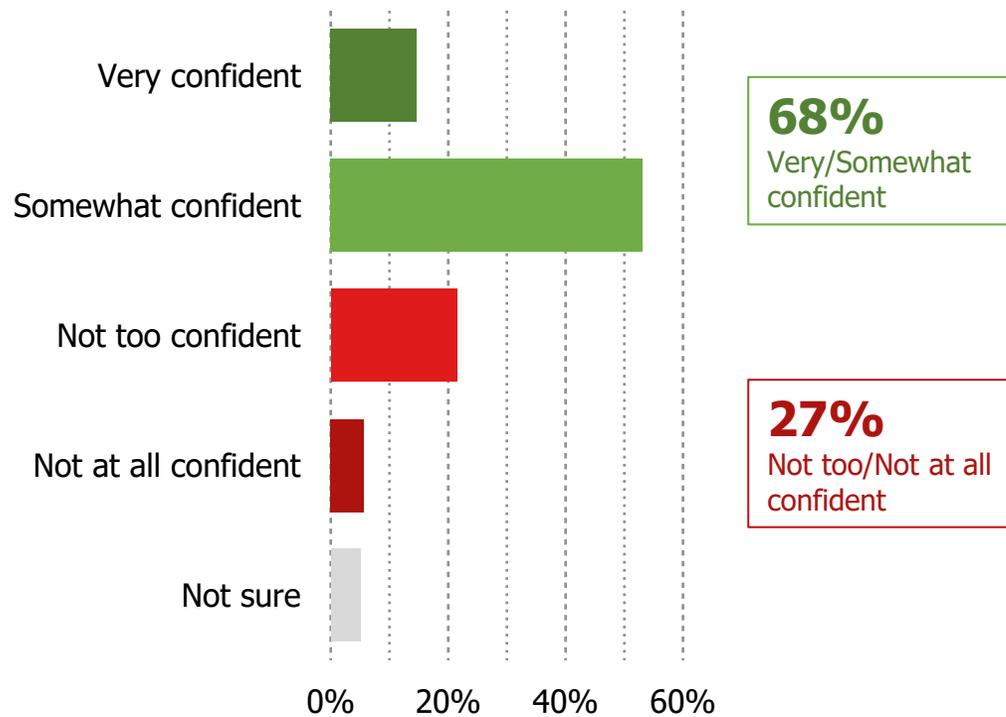
A close-up photograph of a variety of fresh vegetables. In the foreground, there are several heads of green and purple-leafed lettuce, a head of purple cabbage, and a bunch of green broccoli. Below these, there are several zucchini and some orange carrots. The background is slightly blurred, showing more of the same vegetables. The overall lighting is bright and natural, highlighting the textures and colors of the produce.

Food Ingredients

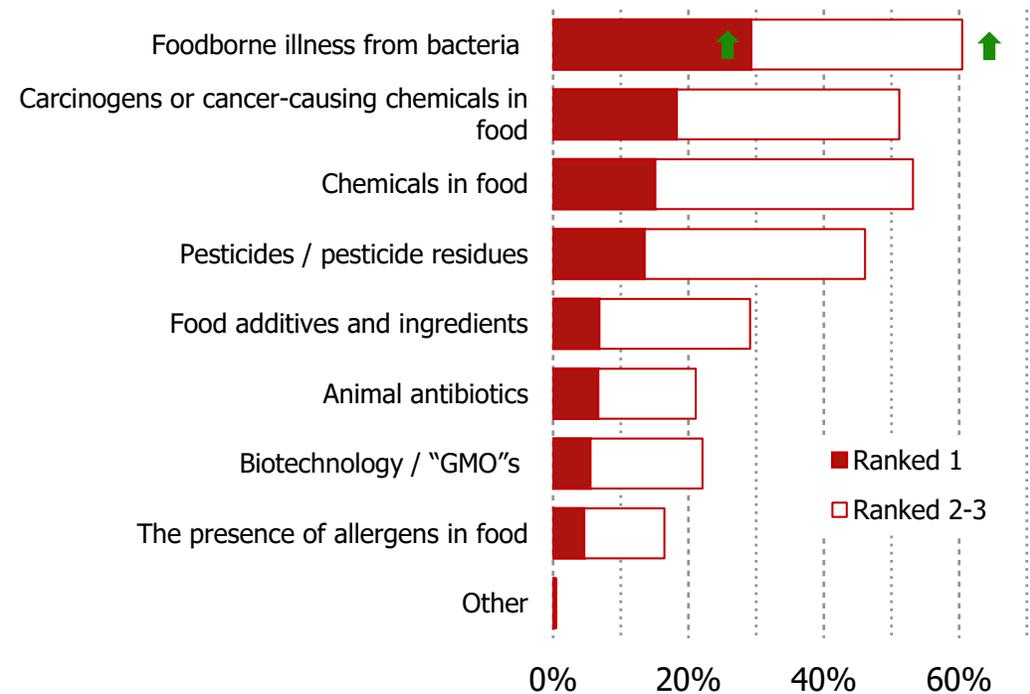
Almost 7 in 10 Have Confidence in Food Supply

Older consumers and men express more confidence than their respective counterparts; foodborne illness continues to be seen as the top food safety issue and even saw an uptick from 2018

Confidence in U.S. Food Supply



Most Important Food Safety Issues Today*



*Response text abridged

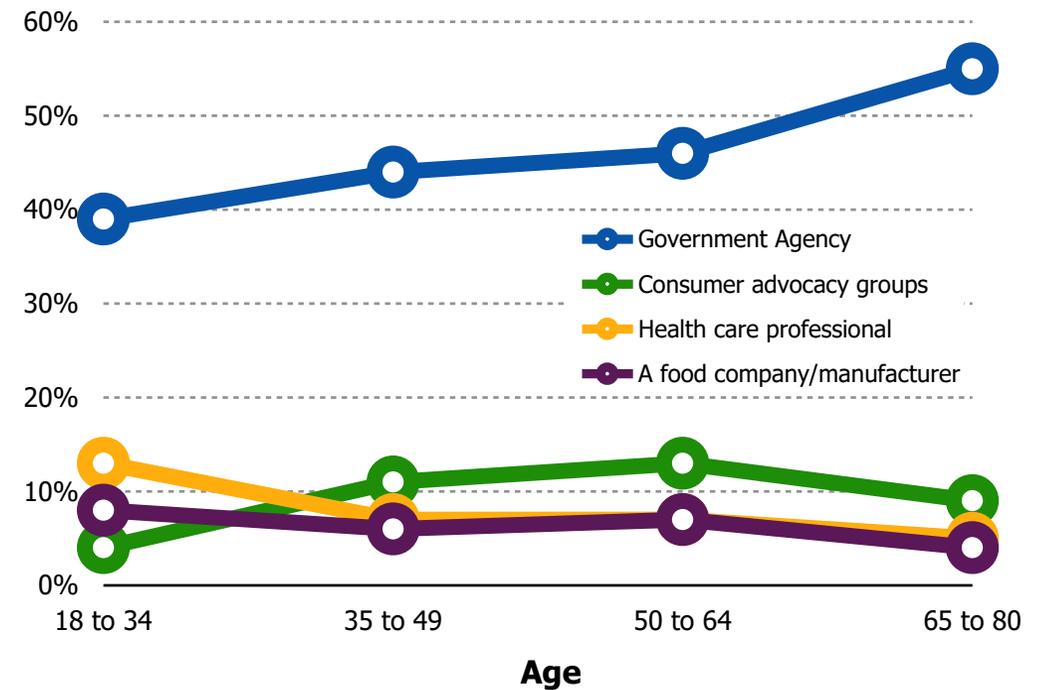
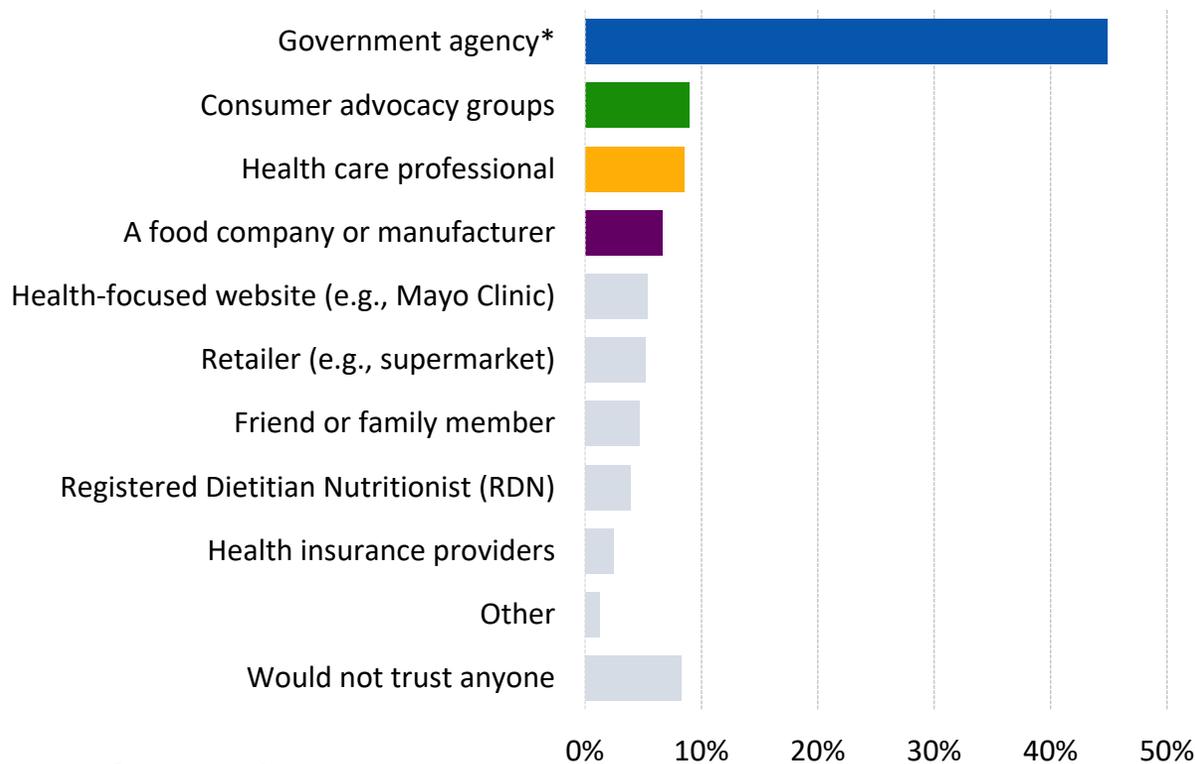
Q58: Overall, how confident are you in the safety of the US food supply? (n=1,012)

Q59: What in your opinion are the three most important food safety issues today? Please rank from 1 to 3, with 1=Most Important. (n=1,012)

Gov't Agencies Are Top Info Source for Recalls

Consumers age 65+ trust government agencies to a greater degree than those younger than 35 years old

Top Source of Information in the Event of a Recall



*Response text abridged

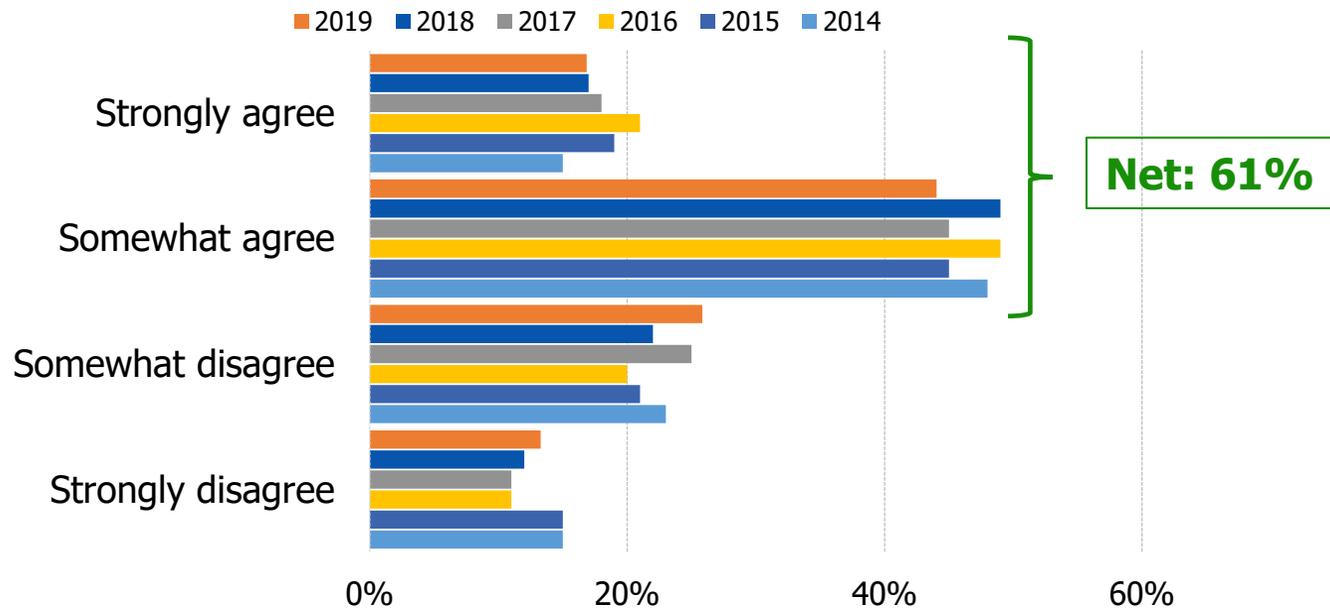
Q60: Imagine that you saw on the news that there is a nationwide food recall of a product you regularly purchase. Who would you trust the most to provide you with more information about the recall if you wanted to learn more? Select only one. (n=1,012)

Only 1 in 6 Certain About Caffeine Consumption

Consumers remain split on whether naturally occurring caffeine differs from added caffeine

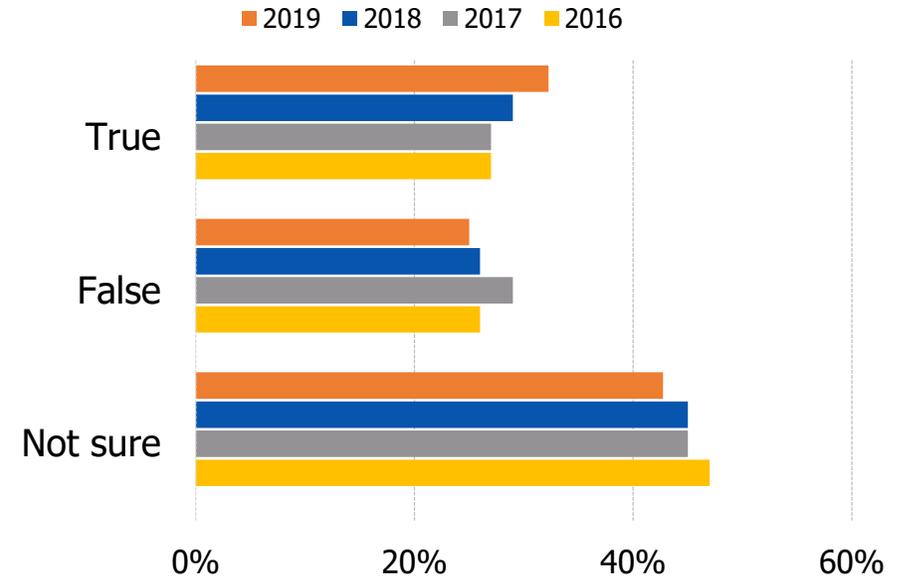
Knows the Amount of Caffeine in Foods and Beverages Consumed

(Of those who consume caffeine)



True or False:

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



Q62: 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=952)

Q63: 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=1,012)

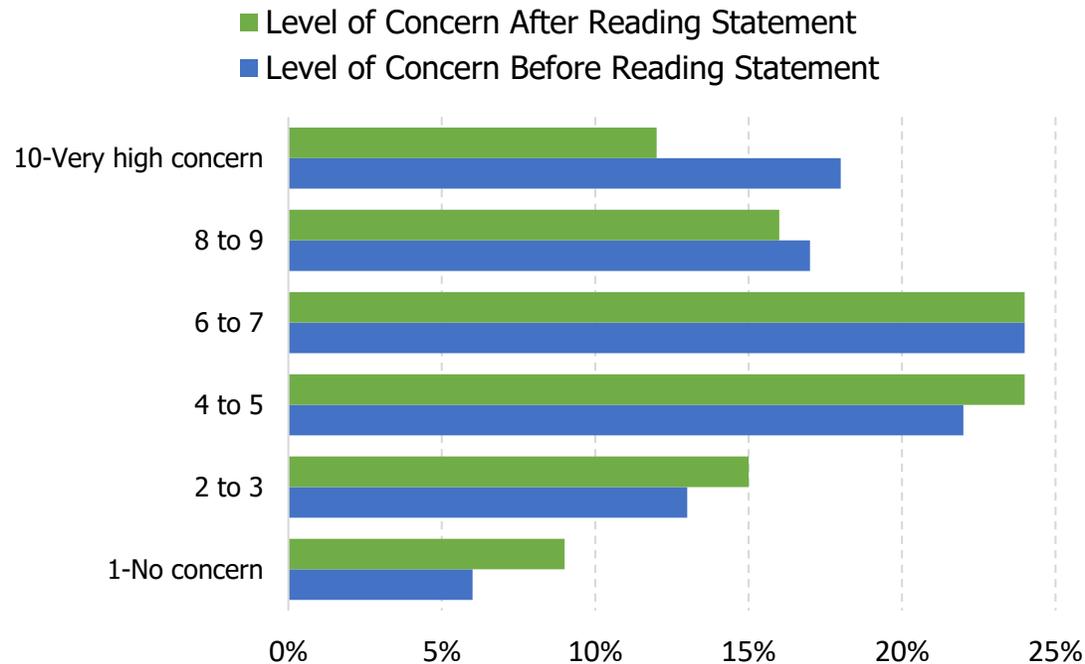
Statement About Arsenic Impacts Concern Level

Over one-third less concerned, however one in five are actually more concerned after reading the statement

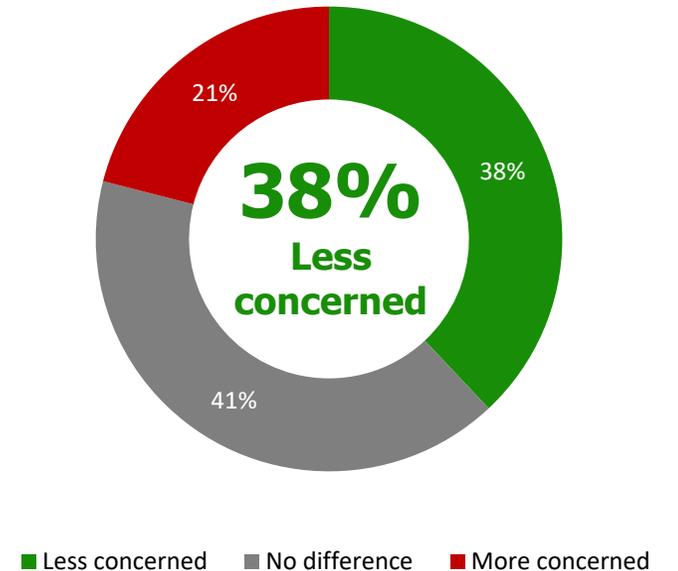
Level of Concern about Arsenic in Foods and Beverages

Change in Level of Concern Before and After Reading the Following Statement

Arsenic is one of many naturally occurring elements in the air, water, rocks and soil. This means that it is common for a variety of foods and beverages to naturally contain trace amounts of arsenic that are not harmful to consumers. Ongoing monitoring of our food supply indicates there is no reason to be alarmed about arsenic in the consumable products that you enjoy. Currently, there is no reason to change your diet and you should feel confident in the ability of the U.S. government to maintain the safety of our food supply.



Change in Response After Statement



Q64: On a scale of 1 to 10, how concerned are you about the possible presence of arsenic in the foods and beverages you purchase on a regular basis? (n=1,012)

Q65: Please read the following statement about arsenic: (See statement above). After reading this statement, how concerned are you, again on a scale of 1 to 10, about the possible presence of arsenic in the foods and beverages you purchase on a regular basis? (n=1,012)

Thank You



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