

# Perceptions on Processed: Consumer Sentiment and Purchasing Habits in 2020

September 2020

# Background

## Survey Methodology

One thousand interviews were conducted among adults ages 18+ from September 10 to September 12, 2020 and were weighted to ensure proportional results.

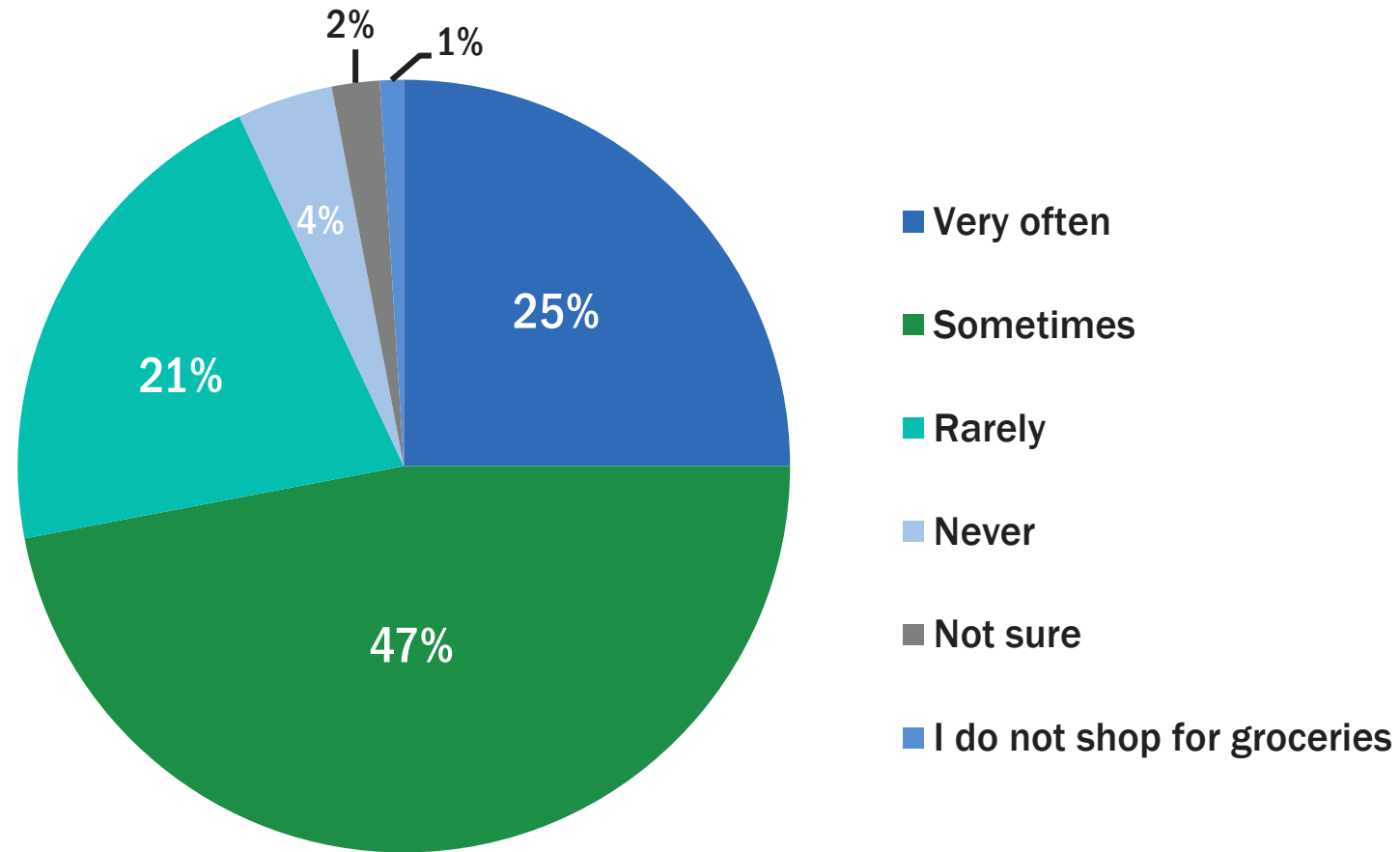
The Bayesian confidence level for 1,000 interviews is 3.5, which is roughly equivalent to a margin of error  $\pm 3.1$  at the 95% confidence level.

## Statistical Significance

Something is statistically significant if the result cannot be attributed to random chance. Statistical significance in this presentation should be compared within each demographic (e.g. age, race, gender, etc.).

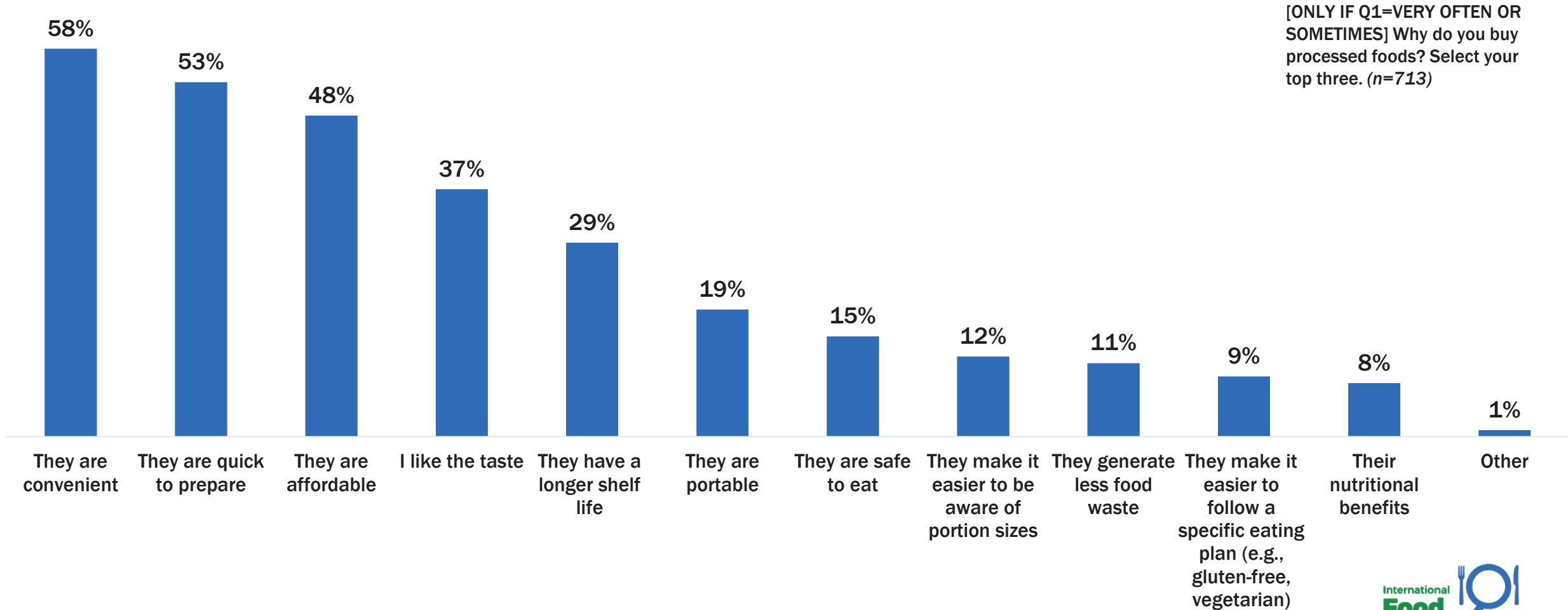
For example, if the responses from female respondents is considered to be significant, it is in relation to male respondents and not necessarily other demographic groups.

# Nearly 3 in 4 buy processed foods at least sometimes

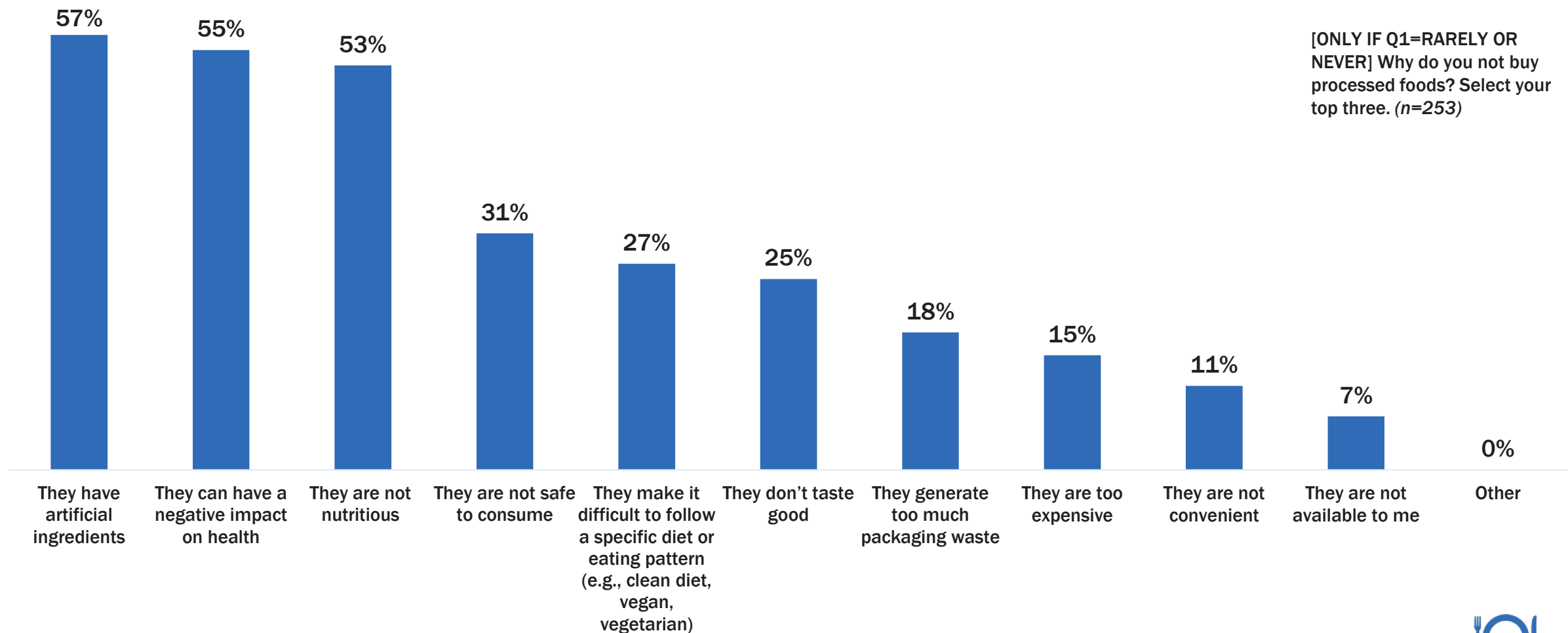


When shopping for food, how often  
do you buy processed foods?  
(n=1000)

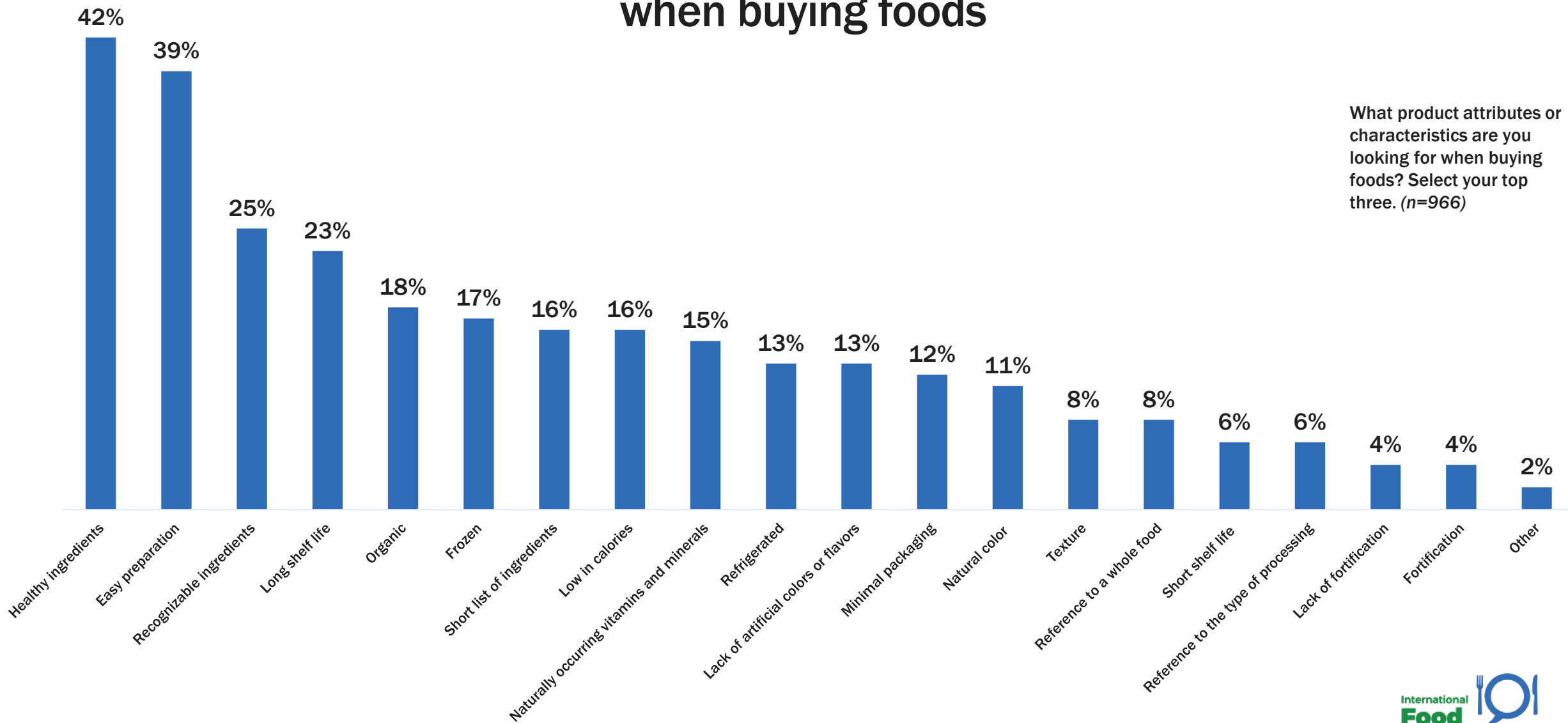
# Convenience, quick preparation and affordability are top reasons people buy processed foods



# Artificial ingredients, perceived negative impact on health and perceived lack of nutrition are primary reasons for not buying processed foods

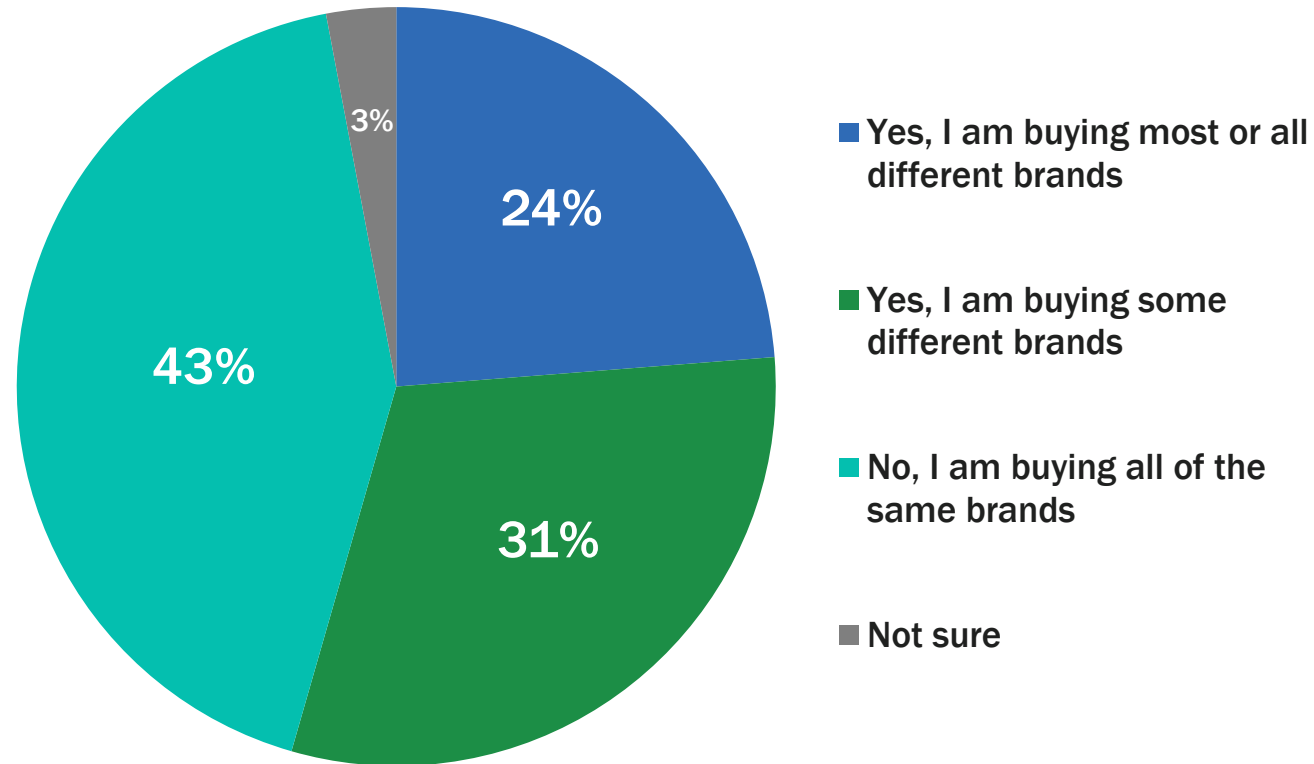


# Healthy ingredients and easy preparation are most sought-after attributes when buying foods



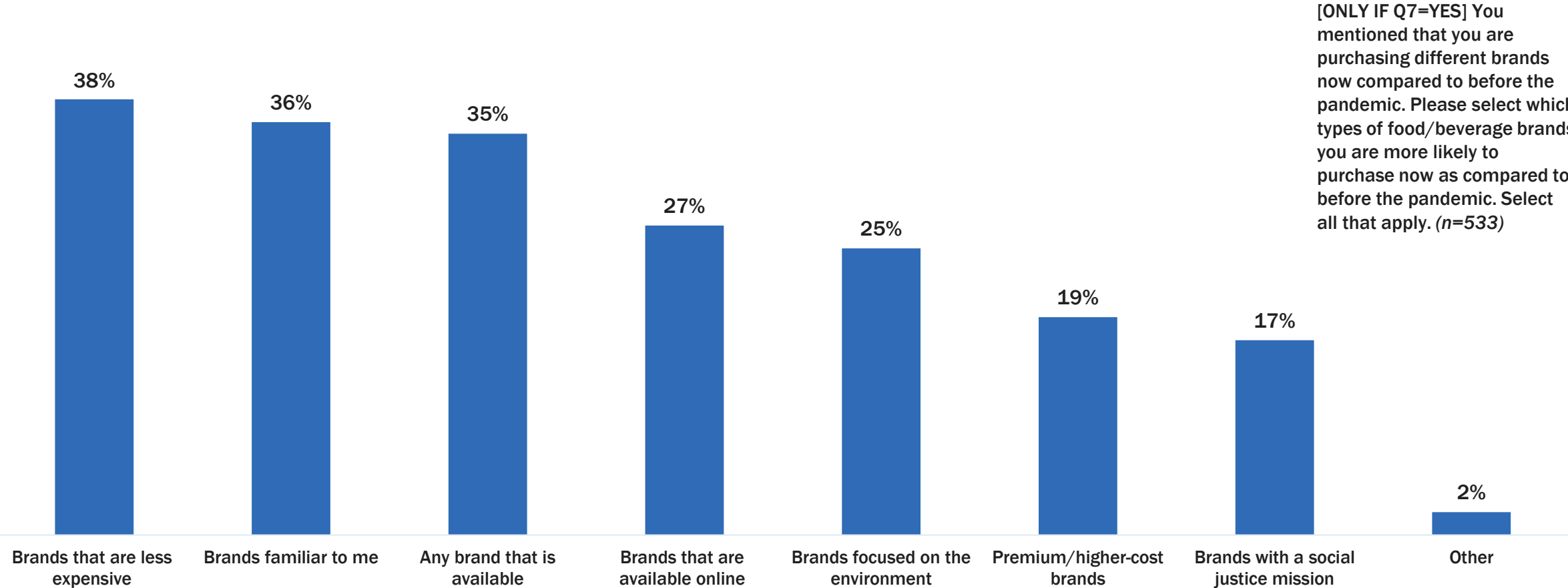


# Over half are buying at least some new food and beverage brands since the COVID-19 pandemic began



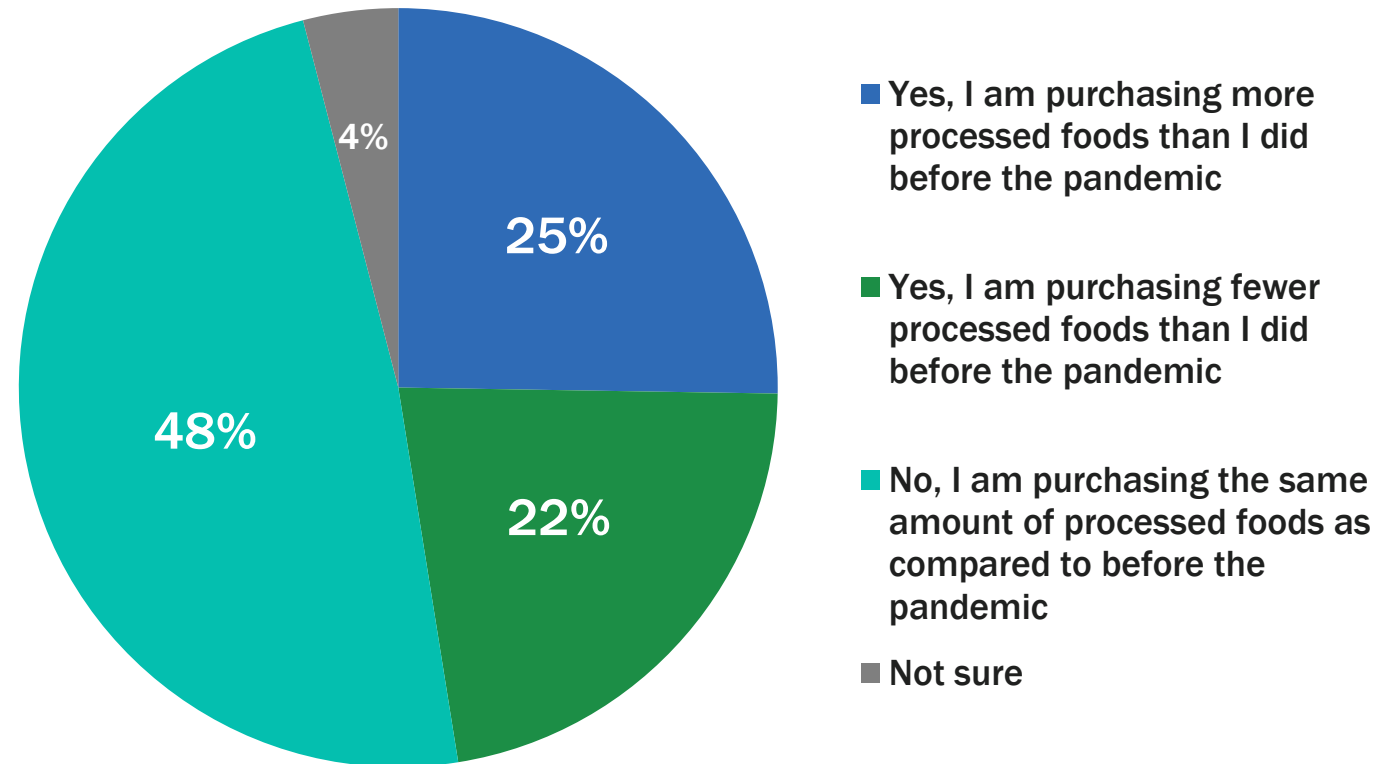
Since the COVID-19 pandemic began, have you made any changes to the food and beverage brands you buy? (n=966)

# For those buying different brands, those that are lower cost, familiar and available are top choices



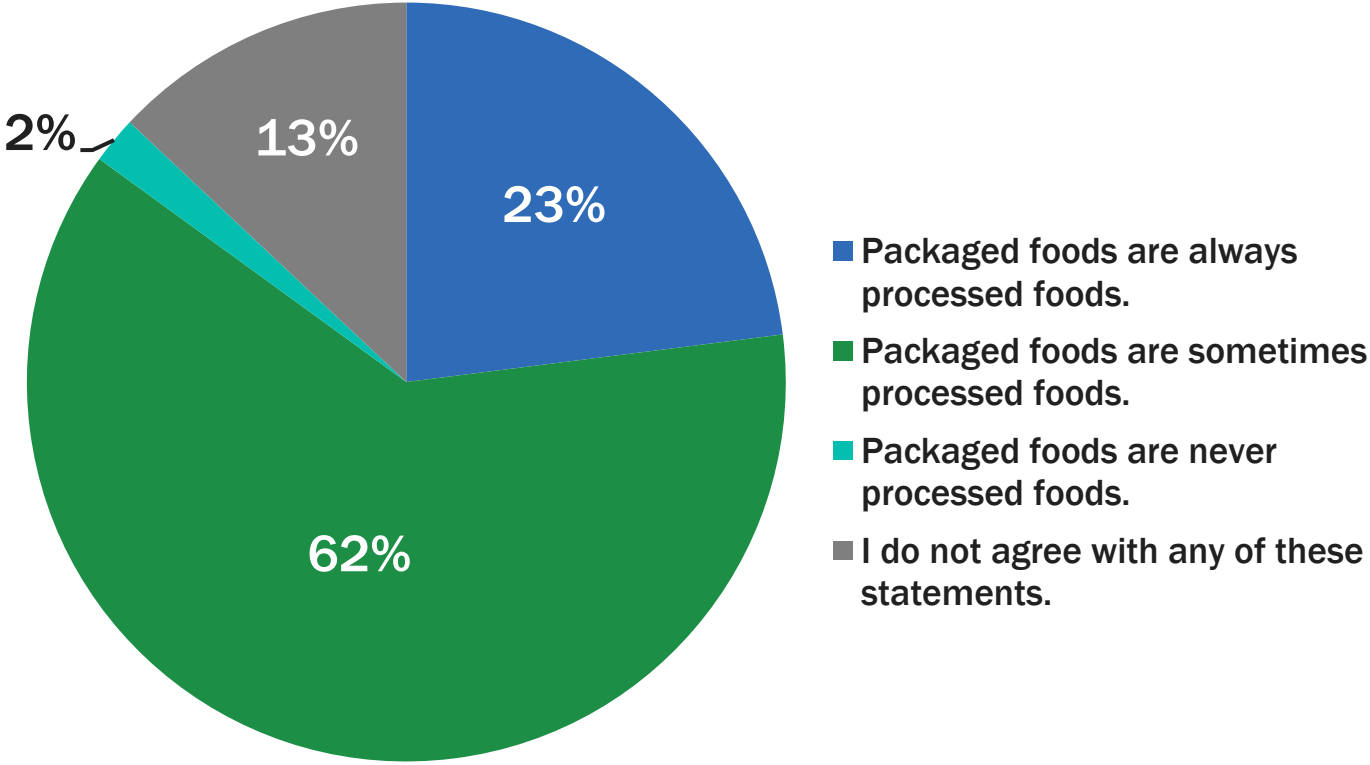


# One in four say they're purchasing more processed foods since COVID-19, but nearly half are buying the same amount



Since the COVID-19 pandemic began, has the amount of processed foods you are buying changed?  
(n=966)

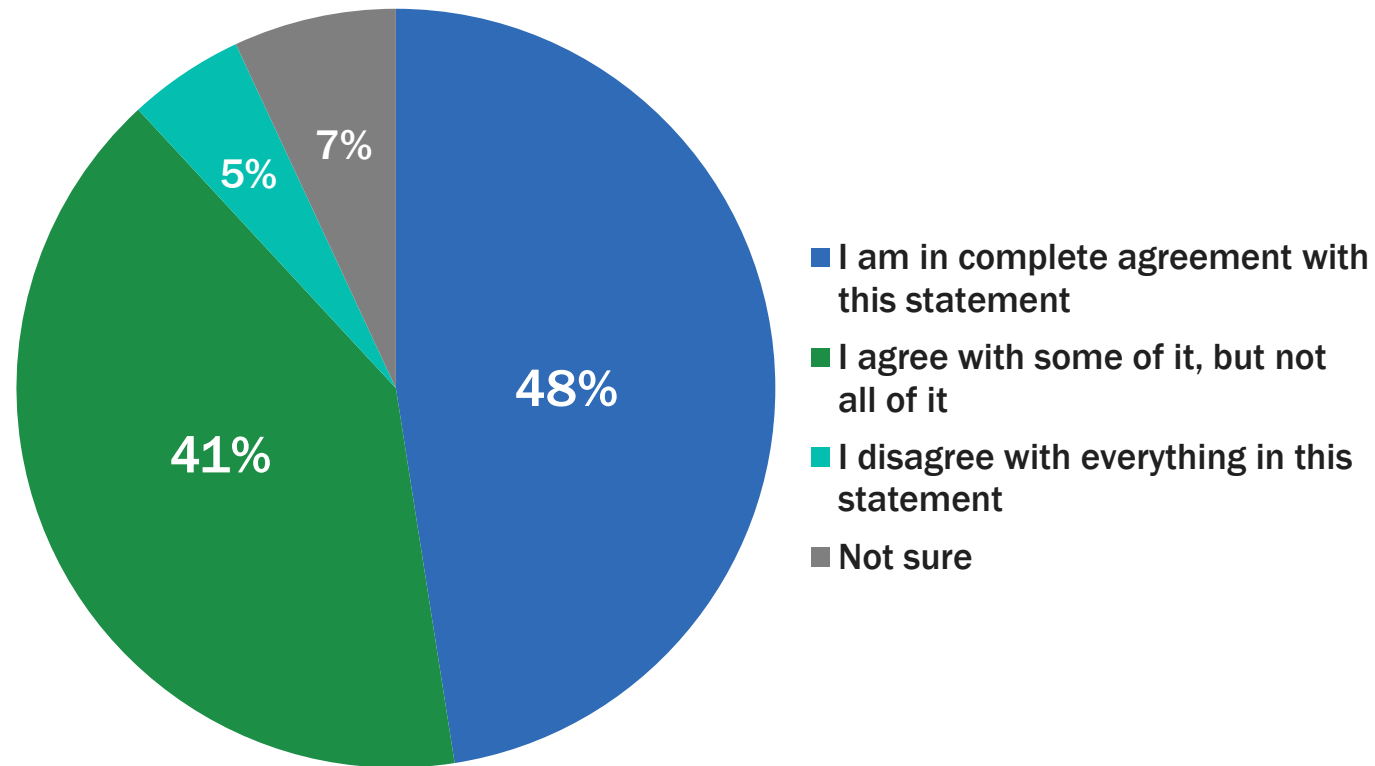
# A majority say that packaged foods are sometimes processed foods; nearly one-in-four say they are always processed



Please select the statement you most agree with. (n=966)

# Nearly 9 in 10 consumers agree or somewhat agree that processed foods are convenient and affordable

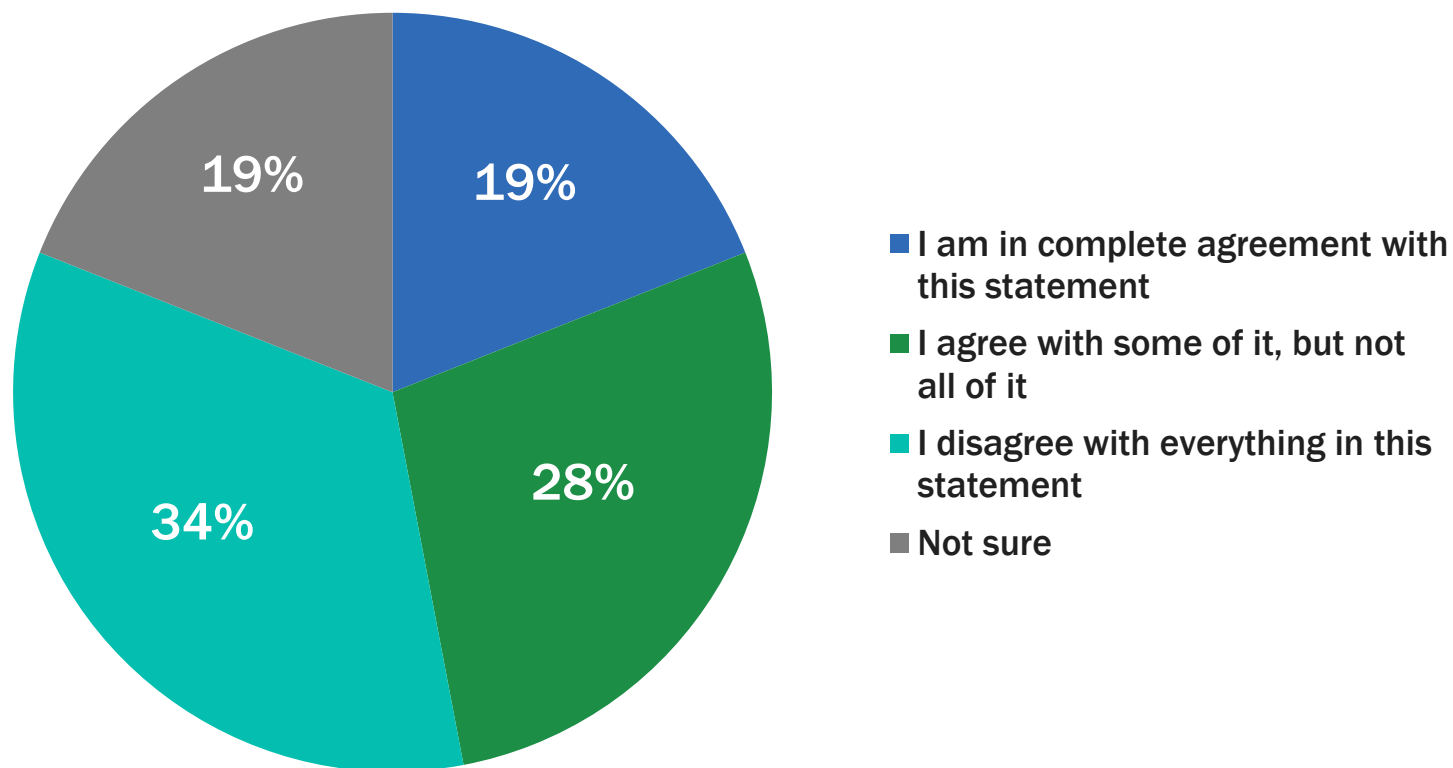
**Statement 1:** Processed foods are convenient, affordable options.



Please select your level of agreement with the statement above. (n=966)

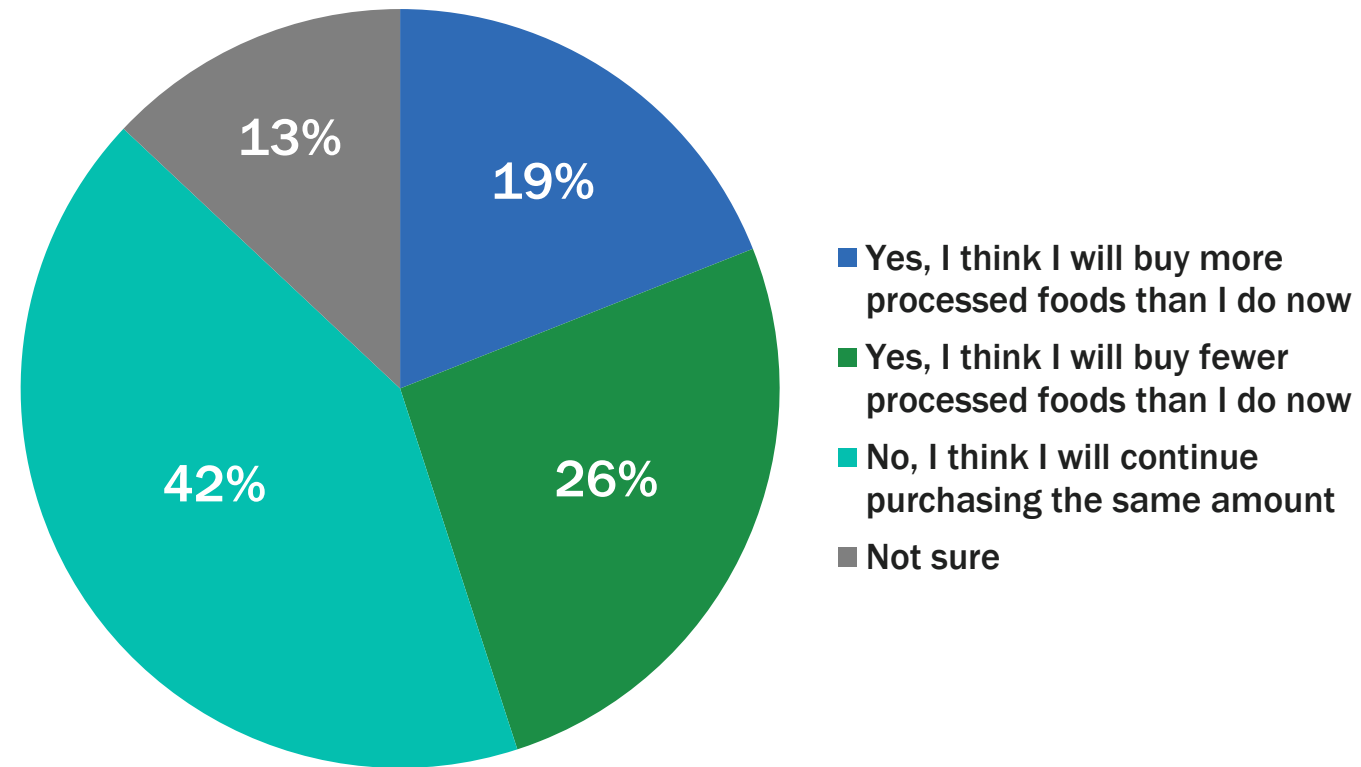
# Consumers are split on whether processed foods are safer than unprocessed foods

**Statement 2:** Processed foods are safer than unprocessed foods.



Please select your level of agreement with the statement above. (n=966)

# One in five say they think they will buy more processed foods over the next few months



Over the next few months, do you think that the amount of processed foods you are buying will change?  
(n=966)

# Appendix

## Q1. When shopping for food, how often do you buy processed foods?

	Very often	Sometimes	Rarely	Never	Not sure	I do not shop for groceries
Total	25%	47%	21%	4%	2%	1%
Men	32% ↑	43%	18%	4%	1%	2%
Women	19% ↓	50%	24%	4%	3%	1%
Less than \$40K	25%	47%	21%	3%	3%	1%
\$40K-\$79K	18% ↓	52%	23%	5%	2%	1%
\$80K+	34% ↑	43%	20%	2%	0% ↓	1%
White	27%	47%	19%	4%	2%	1%
African American	22%	46%	24%	4%	3%	2%
Hispanic/ Latinx	22%	46%	26%	5%	2%	0%
Under 45	30% ↑	45%	19%	3%	2%	1%
45-64	25%	45%	20%	5%	3%	2%
65+	11% ↓	54%	29% ↑	4%	1%	1%
Non-college	22%	49%	21%	4%	3%	1%
College	28%	45%	22%	4%	1%	1%



Q3. [ONLY IF Q1=VERY OFTEN OR SOMETIMES] Why do you buy processed foods? Select your top three.

	Convenient	Quick to prepare	Affordable	Like the taste	Long shelf life	Portable
Total	58%	53%	48%	37%	29%	19%
Men	53% ↓	48% ↓	43%	38%	28%	19%
Women	64% ↑	58% ↑	52%	36%	29%	18%
Less than \$40K	62%	54%	58% ↑	37%	28%	18%
\$40K-\$79K	62%	62% ↑	50%	36%	30%	15%
\$80K+	51%	43% ↓	36% ↓	38%	28%	23%
White	59%	53%	47%	40%	29%	17%
African American	58%	47%	56%	32%	23%	18%
Hispanic/ Latinx	53%	56%	41%	29%	34%	27%
Under 45	49% ↓	48% ↓	47%	37%	28%	20%
45-64	63%	57%	46%	37%	28%	20%
65+	78% ↑	60%	51%	35%	31%	11%
Non-college	62%	56%	54% ↑	37%	27%	20%
College	55%	50%	42% ↓	37%	30%	18%

Q3. [ONLY IF Q1=VERY OFTEN OR SOMETIMES] Why do you buy processed foods? Select your top three.

	Safe to eat	Easier portion sizes	Generate less food waste	Easier to follow eating plan	Nutritional benefits	Other
Total	15%	12%	11%	9%	8%	1%
Men	22% ↑	12%	16% ↑	8%	12% ↑	1%
Women	8% ↓	12%	6% ↓	9%	5% ↓	1%
Less than \$40K	11%	7% ↓	11%	8%	5%	1%
\$40K-\$79K	15%	12%	6%	6%	6%	0%
\$80K+	20%	18% ↑	16% ↑	12%	14% ↑	1%
White	15%	12%	10%	8%	9%	2%
African American	18%	13%	13%	11%	11%	0%
Hispanic/ Latinx	13%	13%	19%	10%	4%	1%
Under 45	21% ↑	13%	14%	10%	12% ↑	1%
45-64	11%	10%	9%	10%	6%	2%
65+	7%	12%	7%	3%	3%	1%
Non-college	12%	9%	9%	6%	5% ↓	2%
College	17%	14%	13%	11%	11%	1%

**Q4. [ONLY IF Q1=RARELY OR NEVER] Why do you not buy processed foods? Select your top three.**

	Artificial ingredients	Negative health impacts	Not nutritious	Not safe to consume	Difficult to follow eating plan	Don't taste good
Total	57%	55%	53%	31%	27%	25%
Men	52%	51%	51%	35%	22%	26%
Women	61%	59%	55%	27%	32%	24%
Less than \$40K	51%	50%	50%	33%	26%	26%
\$40K-\$79K	63%	55%	56%	26%	24%	27%
\$80K+	59%	60%	55%	30%	35%	21%
White	64%	57%	55%	27%	29%	24%
African American	43%	52%	57%	33%	21%	31%
Hispanic/ Latinx	38%	43%	45%	37%	25%	22%
Under 45	43% ↓	50%	49%	33%	27%	30%
45-64	63%	57%	58%	31%	23%	18%
65+	74% ↑	61%	53%	25%	35%	25%
Non-college	50%	50%	49%	36%	28%	28%
College	64%	60%	57%	27%	27%	22%

**Q4. [ONLY IF Q1=RARELY OR NEVER] Why do you not buy processed foods? Select your top three.**

	Too much packaging	Expensive	Not convenient	Not available to me
Total	18%	15%	11%	7%
Men	23%	18%	13%	10%
Women	14%	13%	9%	5%
Less than \$40K	19%	20%	16%	8%
\$40K-\$79K	19%	10%	10%	9%
\$80K+	14%	18%	6%	4%
White	17%	13%	5% ↓	8%
African American	24%	17%	17%	5%
Hispanic/ Latinx	22%	29%	29%	11%
Under 45	24%	20%	16%	7%
45-64	13%	15%	10%	10%
65+	14%	8%	2%	3%
Non-college	22%	16%	13%	7%
College	13%	15%	8%	6%

**Q5. [ONLY IF Q4=NEGATIVE IMPACT] Which of the following health concerns do you have about processed foods?**  
**Select all that apply**

	Heart health	Weight gain	Gastro health	Cancer	Blood sugar	Inflammation	Depression	Other
Total	59%	59%	48%	42%	41%	40%	15%	5%
Men	65%	58%	50%	39%	49%	42%	22%	6%
Women	55%	59%	47%	43%	35%	38%	11%	5%
Less than \$40K	53%	56%	45%	37%	39%	28%	13%	9%
\$40K-\$79K	57%	54%	48%	43%	35%	37%	20%	4%
\$80K+	64%	67%	50%	46%	52%	49%	15%	0%
White	64%	63%	51%	45%	44%	39%	19%	7%
African American	56%	57%	53%	34%	41%	44%	8%	6%
Hispanic/ Latinx	50%	48%	24%	33%	25%	37%	10%	0%
Under 45	46%	53%	37%	37%	32%	30%	18%	2%
45-64	68%	62%	56%	42%	45%	49%	18%	7%
65+	66%	63%	53%	49%	46%	41%	7%	7%
Non-college	61%	50%	47%	33%	29%	36%	14%	5%
College	58%	65%	49%	48%	48%	43%	16%	5%

Q6. What product attributes or characteristics are you looking for when buying foods? Select your top three.

	Healthy ingredients	Easy preparation	Recognize ingredients	Long shelf life	Organic	Frozen	Short list of ingredients	Low in calories	Natural vitamins/minerals	Refrigerated
Total	42%	39%	25%	23%	18%	17%	16%	16%	15%	13%
Men	41%	37%	22%	22%	20%	18%	12% ↓	17%	17%	12%
Women	43%	42%	27%	24%	16%	17%	20% ↑	16%	13%	13%
Less than \$40K	37%	45%	23%	27%	10% ↓	20%	19%	16%	14%	17% ↑
\$40K-\$79K	41%	42%	28%	22%	18%	15%	16%	16%	16%	12%
\$80K+	47%	32% ↓	23%	21%	27% ↑	17%	13%	17%	16%	9%
White	43%	42%	25%	24%	17%	18%	16%	17%	14%	11%
African American	36%	34%	23%	18%	20%	18%	18%	14%	16%	17%
Hispanic/ Latinx	39%	31%	24%	26%	19%	15%	11%	16%	16%	19%
Under 45	36% ↓	36%	19% ↓	23%	20%	17%	14%	16%	13%	15%
45-64	43%	45%	30% ↑	26%	18%	16%	16%	15%	16%	11%
65+	55% ↑	37%	30%	18%	12%	19%	24% ↑	20%	18%	9%
Non-college	35% ↓	43%	25%	27%	12% ↓	21% ↑	18%	14%	14%	16%
College	48% ↑	37%	25%	20%	23% ↑	14%	15%	18%	15%	10%

**Q6. What product attributes or characteristics are you looking for when buying foods? Select your top three.**

	Lack artificial colors/ flavors	Minimal packaging	Natural color	Texture	Reference to a whole food	Short shelf life	Reference type of processing	Lack of fortification	Fortification	Other
Total	13%	12%	11%	8%	8%	6%	6%	4%	4%	2%
Men	13%	13%	13%	8%	9%	6%	7%	4%	6%	2%
Women	13%	11%	9%	8%	8%	6%	6%	3%	3%	2%
Less than \$40K	12%	13%	10%	7%	8%	6%	6%	2%	5%	3%
\$40K-\$79K	16%	11%	9%	10%	7%	6%	9%	4%	2%	1%
\$80K+	12%	12%	13%	6%	10%	7%	5%	5%	6%	2%
White	13%	12%	10%	7%	7%	6%	6%	4%	4%	3%
African American	18%	9%	12%	9%	12%	7%	9%	4%	7%	1%
Hispanic/ Latinx	13%	13%	17%	12%	10%	8%	4%	3%	4%	1%
Under 45	11%	16% ↑	14% ↑	11%	10%	9% ↑	8%	5%	5%	1%
45-64	13%	10%	9%	6%	6%	5%	5%	4%	4%	4%
65+	21% ↑	6%	7%	6%	6%	2% ↓	5%	1% ↓	2%	2%
Non-college	14%	13%	10%	9%	8%	6%	7%	3%	5%	2%
College	13%	12%	11%	7%	8%	6%	6%	5%	4%	3%



**Q7. Since the COVID-19 pandemic began, have you made any changes to the food and beverage brands you buy?**

	Yes, mostly different brands	Yes, some different brands	No, all of the same brands	Not sure
Total	24%	31%	43%	3%
Men	30% ↑	28%	41%	2%
Women	18% ↓	34%	44%	4%
Less than \$40K	21%	28%	46%	5%
\$40K-\$79K	18% ↓	34%	47%	1%
\$80K+	34% ↑	31%	33% ↓	2%
White	22%	29%	47% ↑	2%
African American	26%	37%	34%	2%
Hispanic/ Latinx	31%	30%	34%	5%
Under 45	32% ↑	32%	32% ↓	5% ↑
45-64	22%	28%	48%	2%
65+	6% ↓	33%	61% ↑	1%
Non-college	20%	27%	50% ↑	3%
College	26%	34%	36% ↓	3%

Q8. [ONLY IF Q7=YES] You mentioned that you are purchasing different brands now compared to before the pandemic. Please select which types of food/beverage brands you are more likely to purchase now as compared to before the pandemic. Select all that apply.

	Less expensive	Familiar	Any available	Available online	Focused on environment	Premium/higher cost	Social justice mission	Other
Total	38%	36%	35%	27%	25%	19%	17%	2%
Men	36%	35%	33%	31%	32% ↑	20%	19%	1%
Women	40%	37%	38%	22%	18% ↓	18%	15%	3%
Less than \$40K	43%	37%	33%	20%	20%	15%	15%	3%
\$40K-\$79K	43%	32%	39%	29%	18%	17%	15%	0%
\$80K+	29% ↓	38%	34%	31%	34% ↑	24%	20%	2%
White	38%	35%	38%	28%	26%	16%	17%	2%
African American	37%	39%	30%	19%	20%	27%	18%	2%
Hispanic/ Latinx	36%	35%	27%	32%	25%	21%	14%	3%
Under 45	34%	34%	30%	30%	26%	21%	18%	0% ↓
45-64	42%	36%	40%	25%	25%	15%	18%	3%
65+	45%	41%	43%	16%	21%	17%	12%	5%
Non-college	45%	34%	37%	19% ↓	20%	16%	13%	2%
College	33%	37%	34%	31% ↑	29%	21%	20%	2%

**Q9. Since the COVID-19 pandemic began, has the amount of processed foods you are buying changed?**

	Yes, purchase more processed foods	Yes, purchase fewer processed foods	No, purchase the same amount	Not sure
Total	25%	22%	48%	4%
Men	31% ↑	21%	45%	3%
Women	20% ↓	23%	51%	6%
Less than \$40K	22%	20%	51%	6%
\$40K-\$79K	21%	21%	54%	3%
\$80K+	34% ↑	25%	38% ↓	3%
White	25%	19%	52%	5%
African American	27%	36% ↑	35% ↓	3%
Hispanic/ Latinx	25%	23%	45%	6%
Under 45	34% ↑	23%	37% ↓	6%
45-64	20% ↓	18%	58% ↑	4%
65+	12% ↓	29%	58% ↑	2%
Non-college	20% ↓	23%	51%	6%
College	29% ↑	21%	46%	3%

**Q11. Please select the statement you most agree with.**

	Packaged foods are always processed foods	Packaged foods are sometimes processed foods	Packaged foods are never processed foods	I do not agree with any of these statements
Total	23%	62%	2%	13%
Men	28% ↑	59%	2%	11%
Women	19% ↓	65%	2%	14%
Less than \$40K	21%	59%	3%	16%
\$40K-\$79K	18%	68%	1%	12%
\$80K+	32% ↑	59%	2%	7% ↓
White	24%	62%	2%	12%
African American	27%	53%	4%	16%
Hispanic/ Latinx	24%	65%	2%	9%
Under 45	29% ↑	57% ↓	4% ↑	10% ↓
45-64	19%	65%	1%	15%
65+	15% ↓	69%	0%	16%
Non-college	22%	58%	3%	17% ↑
College	25%	65%	1%	9% ↓

**Q13. Statement 1: “Processed foods are convenient, affordable options.” Please select your level of agreement with the statement above.**

	In complete agreement	Agree with some of it, but not all	Disagree with everything	Not sure
Total	48%	41%	5%	7%
Men	54% ↑	38%	3%	5%
Women	42% ↓	43%	6%	9%
Less than \$40K	47%	39%	4%	10%
\$40K-\$79K	44%	46%	5%	5%
\$80K+	56% ↑	37%	4%	3% ↓
White	49%	39%	5%	7%
African American	44%	44%	6%	6%
Hispanic/ Latinx	46%	41%	3%	10%
Under 45	53% ↑	37%	3%	7%
45-64	46%	42%	5%	7%
65+	39% ↓	48%	6%	7%
Non-college	45%	39%	5%	10% ↑
College	50%	42%	4%	4% ↓

**Q15. Statement 2: “Processed foods are safer than unprocessed foods.” Please select your level of agreement with the statement above.**

	In complete agreement	Agree with some of it, but not all	Disagree with everything	Not sure
Total	19%	28%	34%	19%
Men	28% ↑	28%	28% ↓	15% ↓
Women	10% ↓	28%	39% ↑	23% ↑
Less than \$40K	13% ↓	30%	33%	24% ↑
\$40K-\$79K	14%	32%	35%	19%
\$80K+	32% ↑	24%	32%	11% ↓
White	20%	28%	35%	18%
African American	20%	30%	30%	20%
Hispanic/ Latinx	18%	33%	30%	20%
Under 45	23% ↑	29%	31%	17%
45-64	19%	27%	35%	19%
65+	6% ↓	29%	39%	26%
Non-college	14% ↓	28%	34%	23% ↑
College	22%	28%	34%	16% ↓

**Q17. Please select which of the following foods you would consider processed. Select all that apply.**

	Canned carrots	Baked or fried carrot chips	Baked/ fried carrot chips with vit A	Carrot puffs	Pickled or fermented carrots	Carrot juice	Pureed carrot baby food	Microwaved carrots
Total	42%	38%	36%	32%	31%	28%	27%	26%
Men	41%	33% ↓	32%	29%	29%	31%	25%	30% ↑
Women	43%	43% ↑	40%	35%	32%	25%	28%	22% ↓
Less than \$40K	40%	37%	32%	28%	30%	25%	26%	24%
\$40K-\$79K	44%	38%	39%	32%	35%	33%	31%	25%
\$80K+	46%	39%	38%	37%	30%	27%	26%	31%
White	43%	42% ↑	41% ↑	36% ↑	33%	29%	30%	27%
African American	36%	30%	27%	28%	26%	22%	21%	27%
Hispanic/ Latinx	47%	24%	22%	19%	24%	26%	18%	25%
Under 45	37% ↓	30% ↓	28% ↓	23% ↓	23% ↓	25%	20% ↓	30%
45-64	45%	39%	36%	37%	31%	27%	29%	27%
65+	52% ↑	60% ↑	60% ↑	48% ↑	52% ↑	35%	42% ↑	15% ↓
Non-college	41%	33% ↓	33%	29%	30%	24%	26%	25%
College	44%	43% ↑	40%	35%	32%	30%	28%	27%



**Q17. Please select which of the following foods you would consider processed. Select all that apply.**

	Frozen carrots	Vitamin A extracted from carrots	Freeze-dried carrots	Carrot extract	Sautéed carrots	Fresh, full-sized carrots	Fresh, baby carrots	I do not consider these processed
Total	22%	20%	19%	17%	15%	13%	12%	14%
Men	21%	23%	15% ↓	18%	16%	17% ↑	14%	13%
Women	24%	18%	23% ↑	17%	15%	9% ↓	10%	16%
Less than \$40K	22%	17%	20%	21%	13%	8% ↓	8% ↓	18%
\$40K-\$79K	23%	24%	17%	16%	17%	9%	12%	12%
\$80K+	23%	22%	20%	16%	17%	21% ↑	18% ↑	8% ↓
White	21%	21%	18%	19%	15%	11%	11%	14%
African American	19%	17%	20%	14%	15%	16%	15%	16%
Hispanic/ Latinx	34%	17%	22%	13%	15%	16%	17%	12%
Under 45	27% ↑	20%	21%	14%	17%	19% ↑	17% ↑	11%
45-64	19%	18%	15%	19%	12%	10%	10%	17%
65+	15%	25%	22%	24% ↑	16%	2% ↓	4% ↓	15%
Non-college	22%	17%	19%	17%	15%	9% ↓	11%	17%
College	23%	23%	19%	18%	15%	16% ↑	13%	12%

**Q18. Over the next few months, do you think that the amount of processed foods you are buying will change?**

	Yes, will purchase more processed foods	Yes, will purchase fewer processed foods	No, will purchase the same amount	Not sure
Total	19%	26%	42%	13%
Men	26% ↑	25%	40%	10%
Women	13% ↓	26%	45%	16%
Less than \$40K	14%	26%	43%	16%
\$40K-\$79K	15%	28%	47%	10%
\$80K+	31% ↑	22%	38%	10%
White	19%	21% ↓	47% ↑	13%
African American	23%	34%	32%	12%
Hispanic/ Latinx	20%	34%	33%	13%
Under 45	28% ↑	31% ↑	31% ↓	10%
45-64	15%	19% ↓	50% ↑	15%
65+	2% ↓	25%	59% ↑	14%
Non-college	16%	29%	41%	15%
College	22%	23%	44%	11%



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