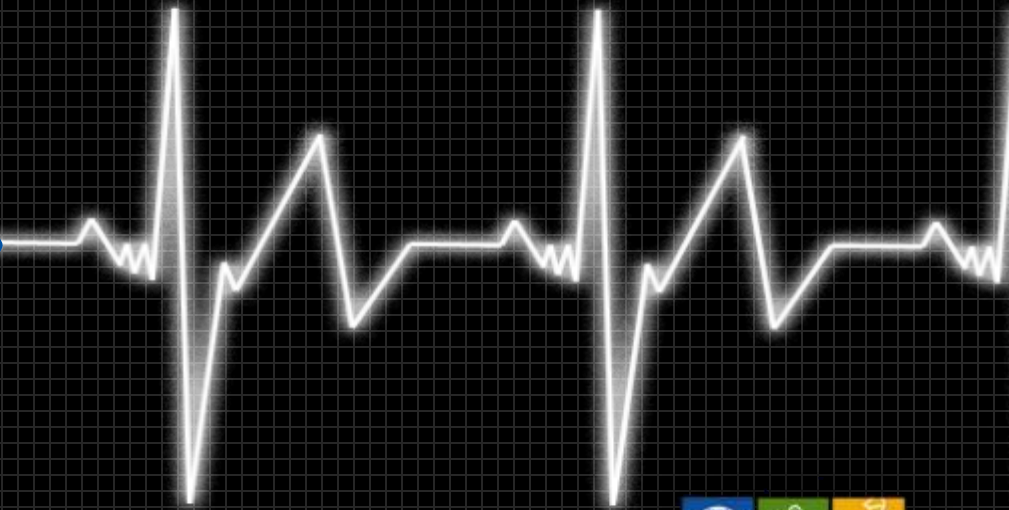


2014 Food & Health Survey

The Pulse of America's Diet:
From Beliefs to Behaviors



INTERNATIONAL
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An online survey was conducted with 1,005 Americans about their health, diet, influences on food selection, and related knowledge and beliefs.

- This report presents the results of an online survey of 1,005 Americans ages 18 to 80.
- Many of the questions have been asked in prior Food and Health Surveys, allowing for trend analysis. Some new topics were included in the questionnaire also.
- Fielding took place from March 26 to April 7, 2014.
- The duration of the survey was 28 minutes, on average.
- The results were weighted to ensure that they are reflective of the American population ages 18 to 80, as seen in the 2013 Current Population Survey. Specifically, they were weighted by age, education, gender, race/ethnicity, and region.
- The survey was conducted by Greenwald & Associates, using Research Now's consumer panel.

Note: Percentages may not add to 100% or to totals shown due to rounding.



THE PULSE OF AMERICA'S DIET

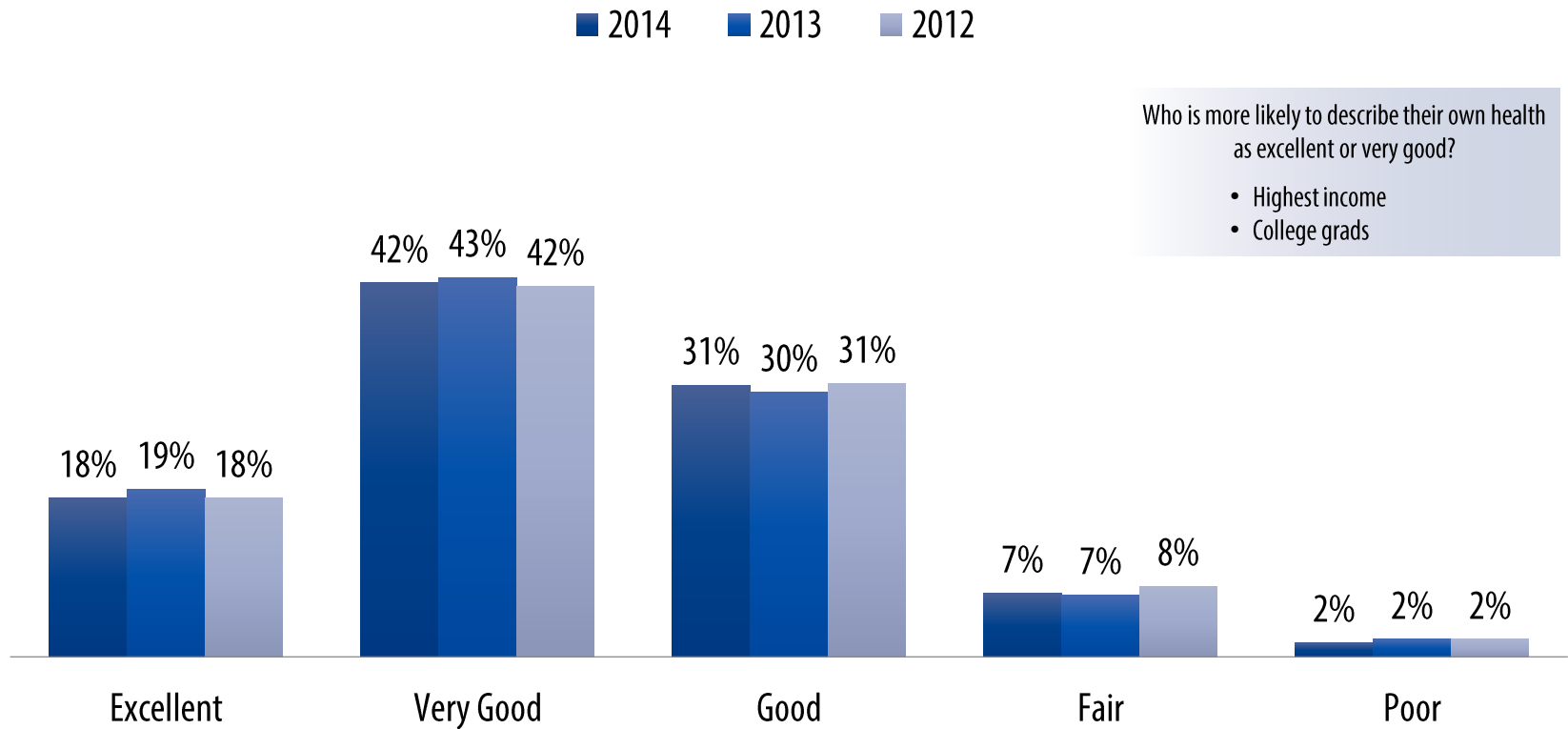


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COUNCIL FOUNDATION

Health & Diet

Consistent with previous years, nine out of ten Americans describe themselves as being (*excellent/very good/good*) healthy.

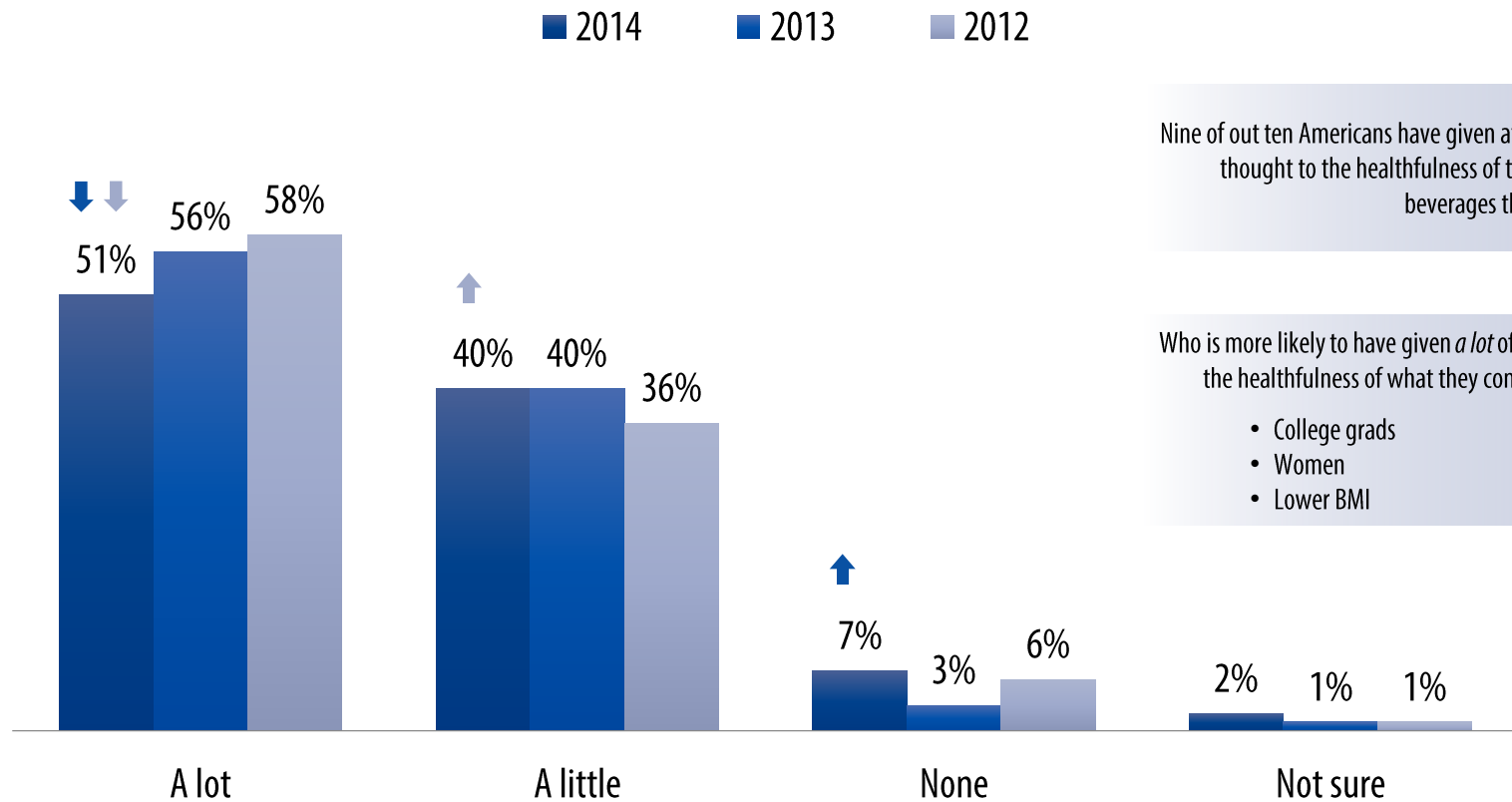
How would you describe your own health in general?



2014 n=1,005; 2013 n=1,006; 2012 n=1,057

In 2014, half of all Americans have given *a lot* of thought to the healthfulness of foods and beverages they consume.

Over the past year, how much thought have you given to the healthfulness of the foods and beverages you consume?

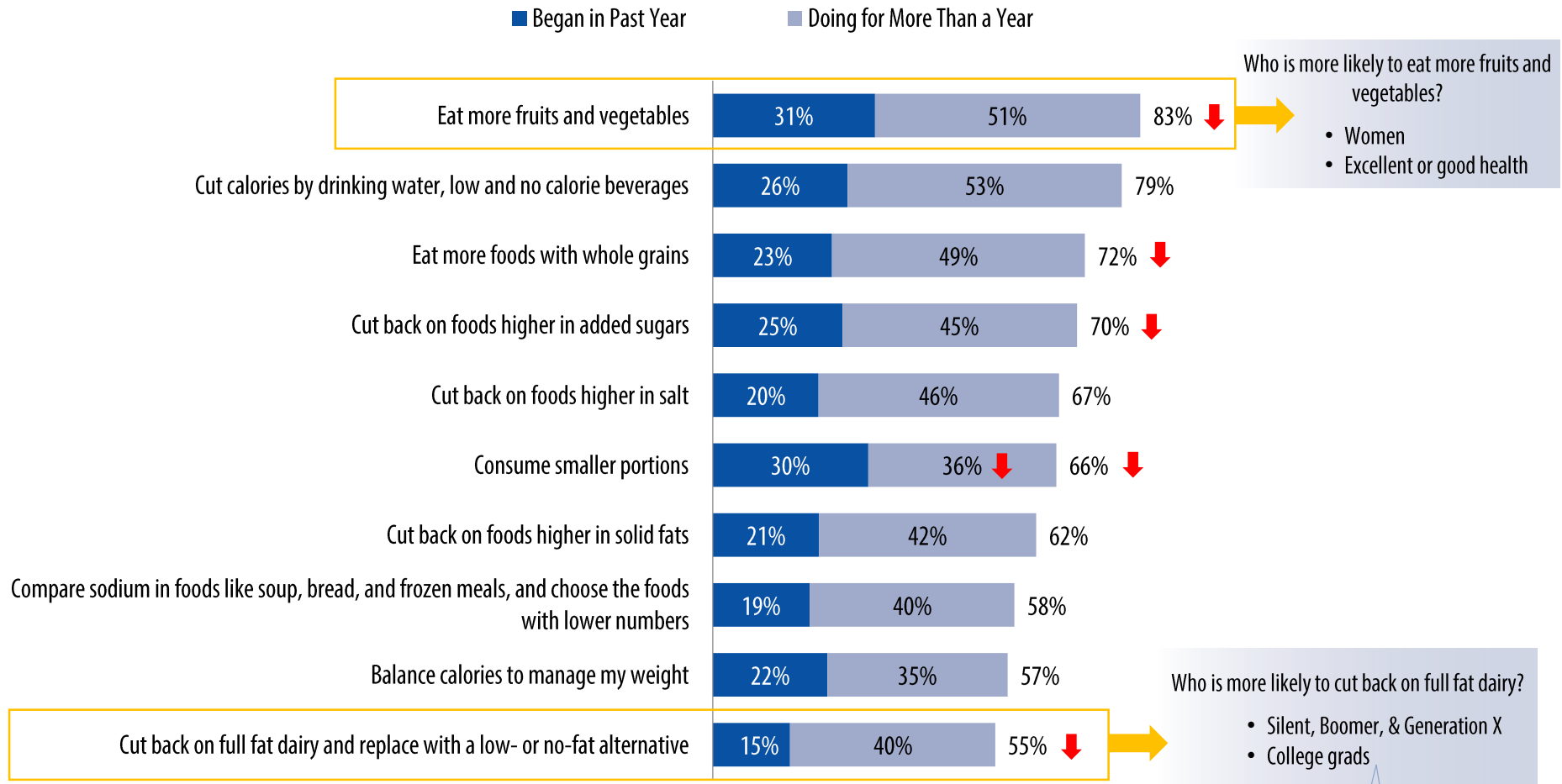


2014 n=1,005; 2013 n=1,006; 2012 n=1,057

Arrows indicate significant (.95 level) differences vs. prior year(s); color of arrow indicates comparison year.

More than four out of five Americans have made an effort to eat more fruits and vegetables. The least popular action is to cut back on full fat dairy.

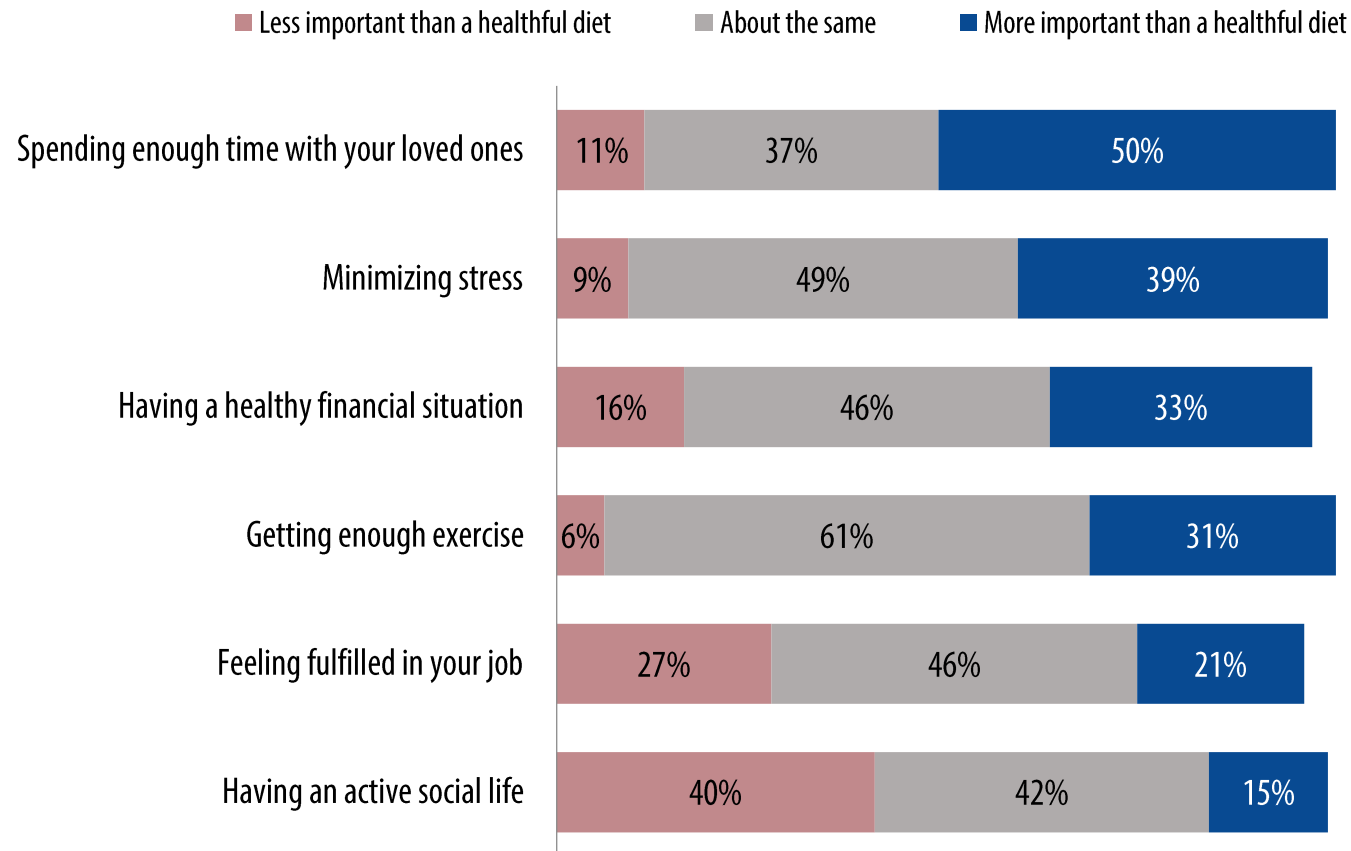
Over the past year, which of the following, if any, have you made an effort to do?



2014 n=1,005; Arrows indicate significant (.95 level) differences vs. 2013.

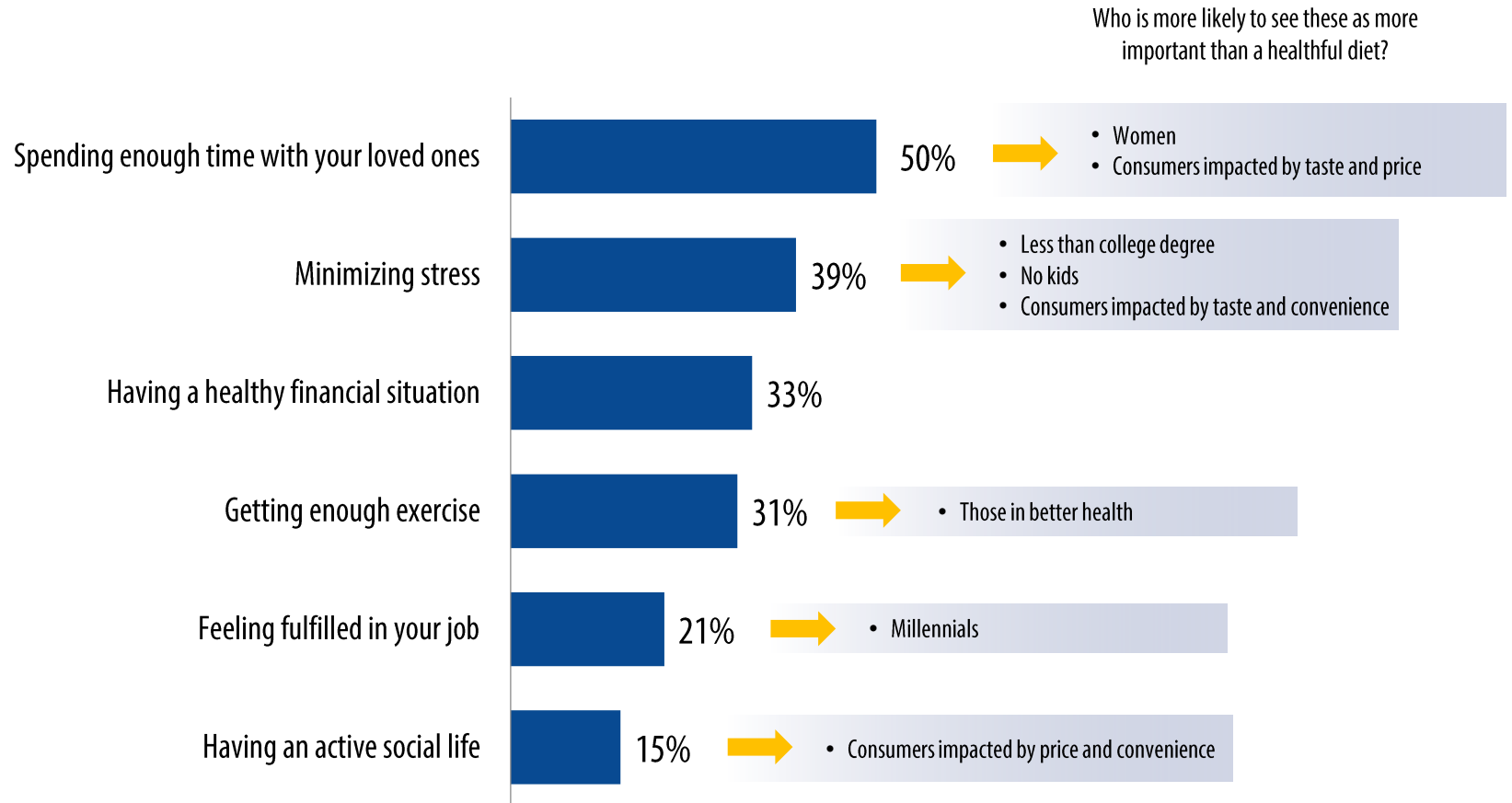
The majority say that spending time with loved ones is more important than having a healthful diet. On the other hand, two out of five feel that having an active social life is less important than eating a healthful diet.

If you had to compare the importance of the following to the importance of having a healthful diet, would you say...?



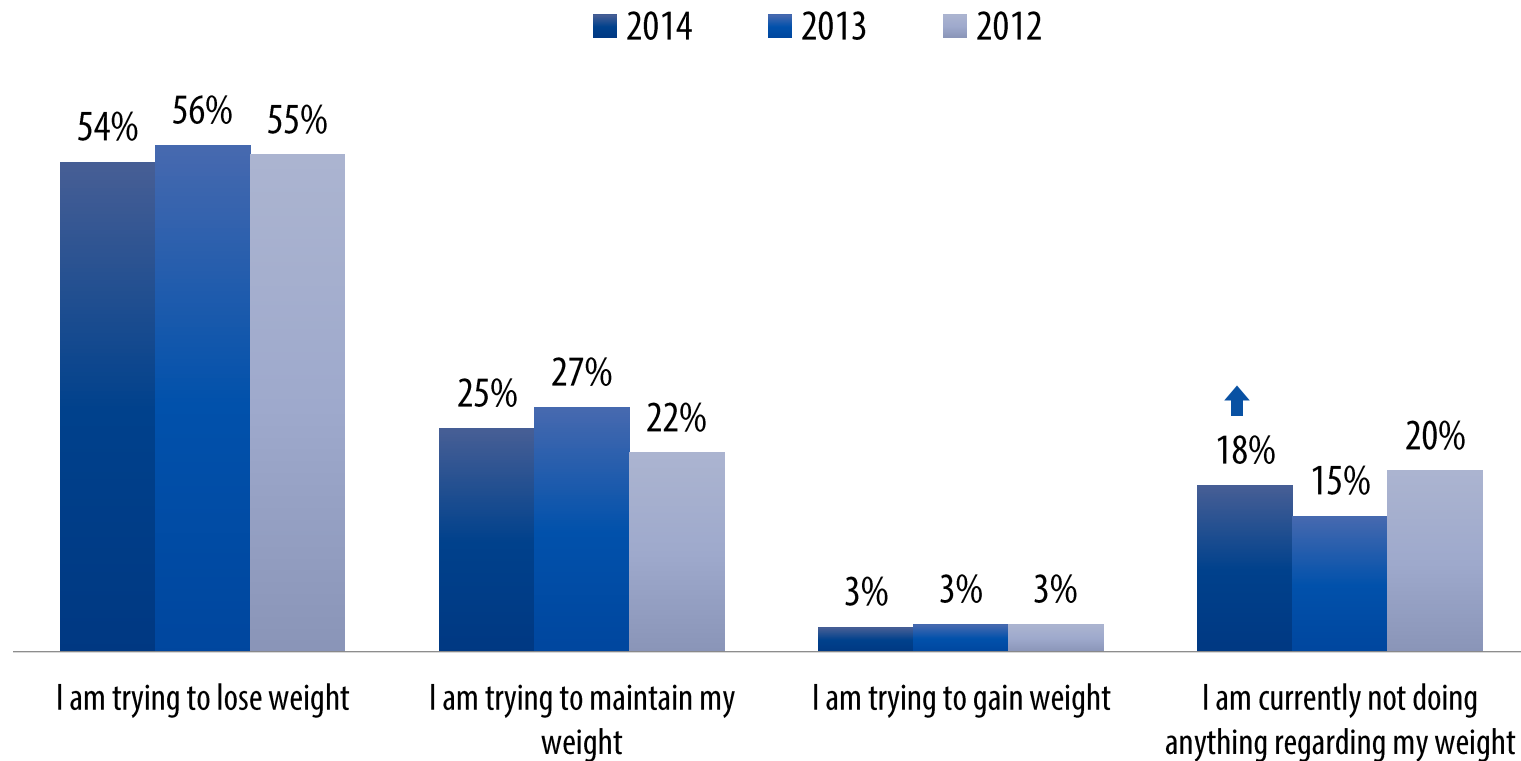
Certain consumers place more emphasis on these goals than others. Millennials, for instance, are more likely to rank job fulfillment ahead of a healthful diet.

More Important Than a Healthful Diet



Four out of five Americans are trying to lose weight or maintain their current weight. One in five are not doing anything for their weight.

Which of the following best describes what you are currently doing regarding your weight?



2014 n=1,005; 2013 n=1,006; 2012 n=1,057

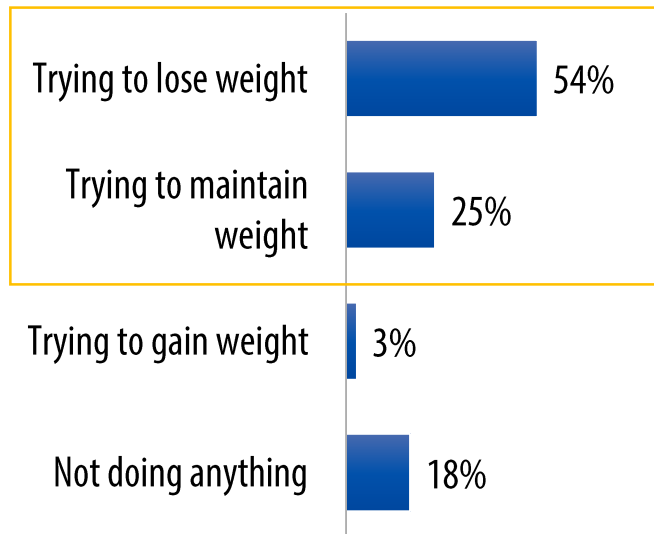
Arrows indicate significant (.95 level) differences vs. prior year(s); color of arrow indicates comparison year.

The majority of Americans report trying to lose or maintain weight. When asked what methods they will use for weight management, four out of five say they would eat smaller portions, and three-quarters would track and increase their physical activity.

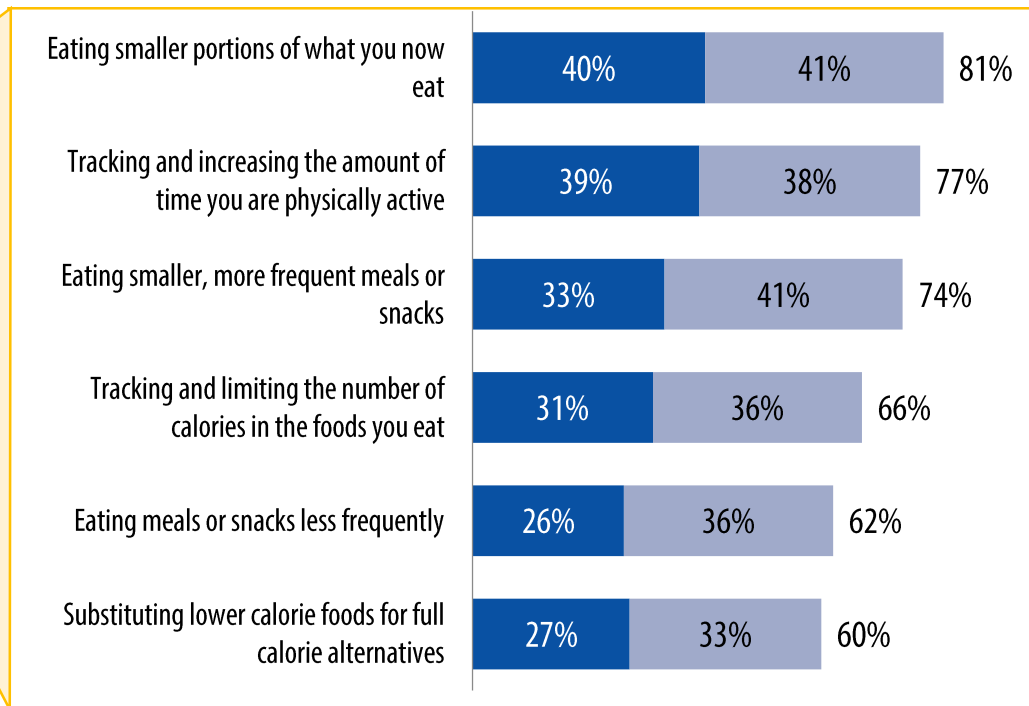
How likely do you think you would be to use or continue using each of the following methods of weight management in the next year?

Trying to Lose or Maintain Weight 2014
(n=803)

Which of the following best describes what you are currently doing regarding your weight?

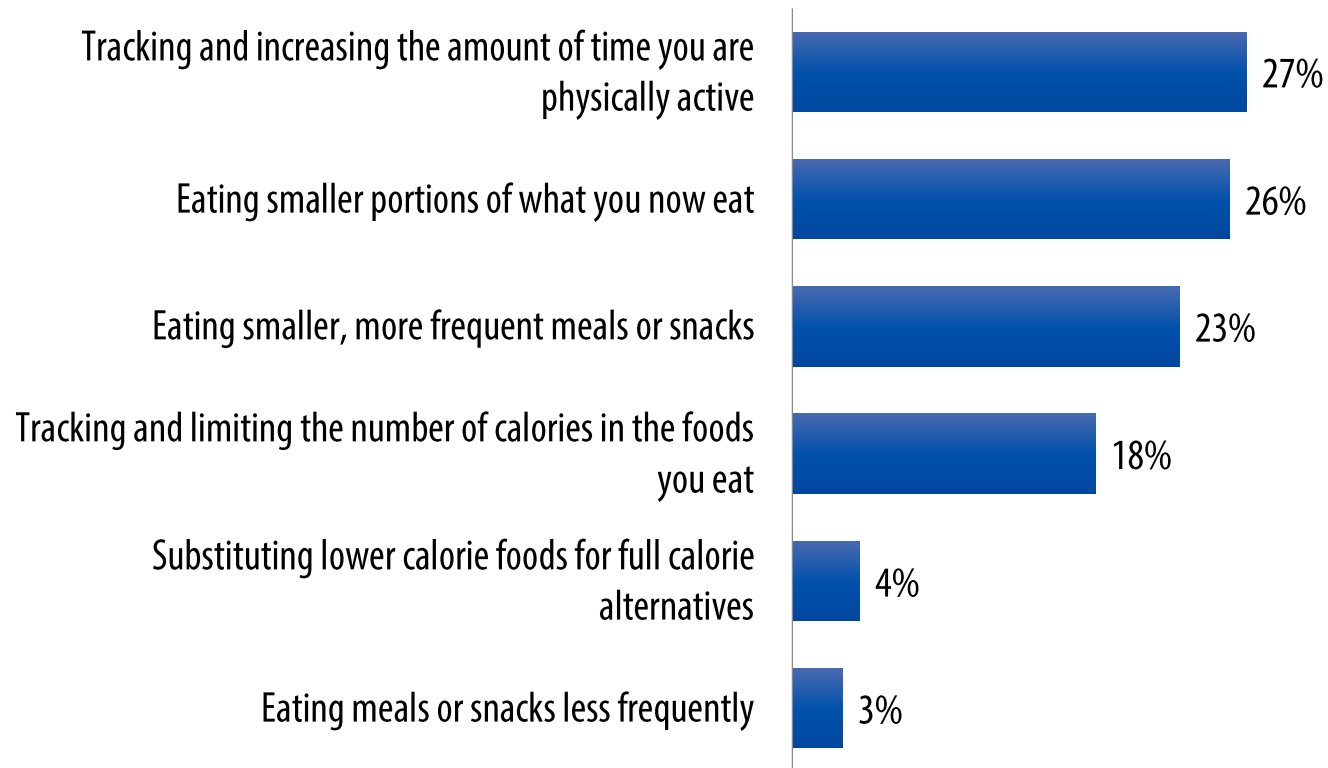


■ Very likely ■ Somewhat likely



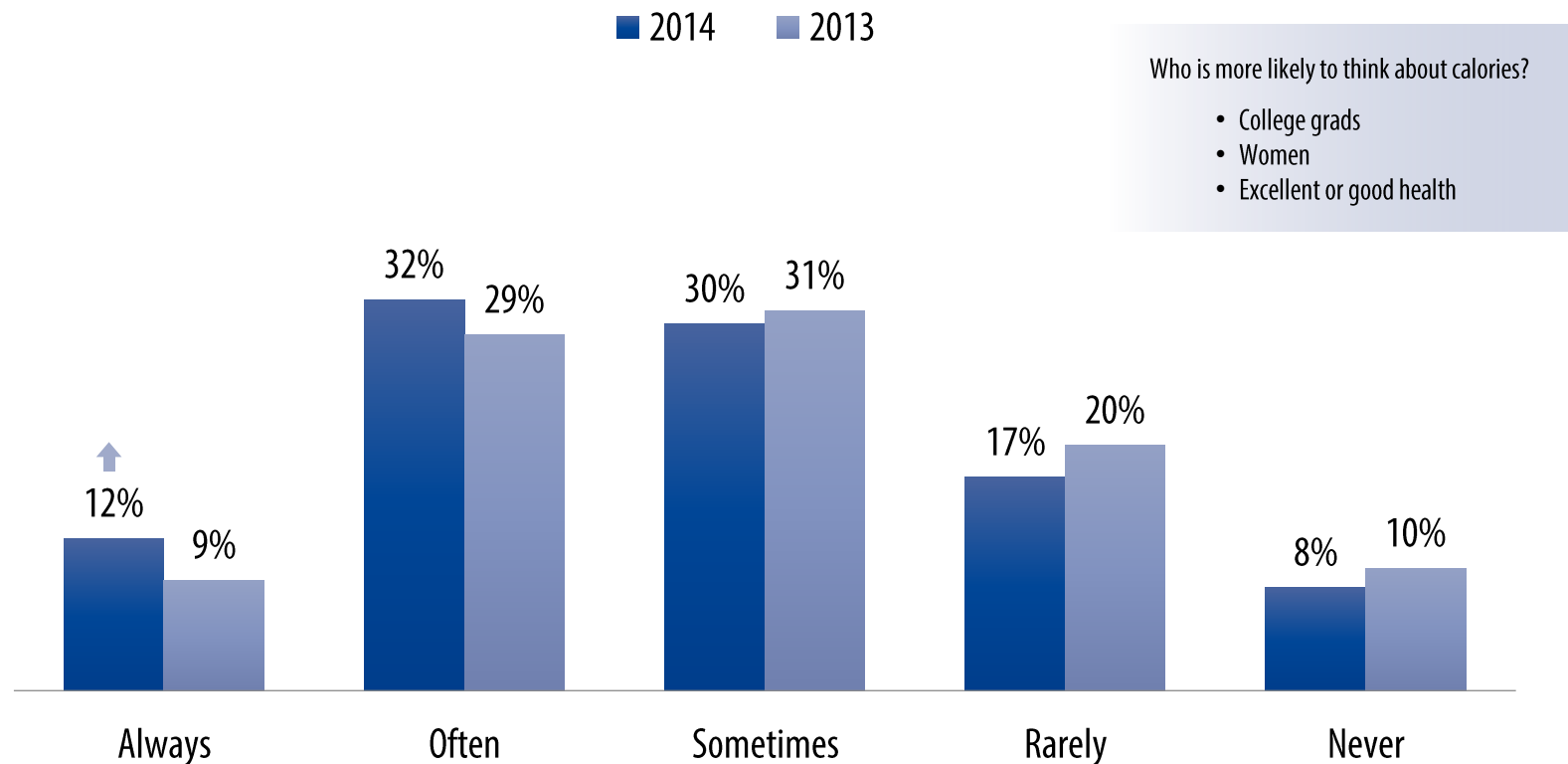
Consumers in general think that tracking and increasing physical activity and eating smaller portions are the most effective weight management strategies for the average person.

In general, which ONE of the following weight management strategies do you believe is the MOST effective for the average person?



Slightly more than two out of five Americans think about calories *often or always*, while a quarter of Americans think about calories *rarely or never*.

How often do you think about the number of calories you consume?

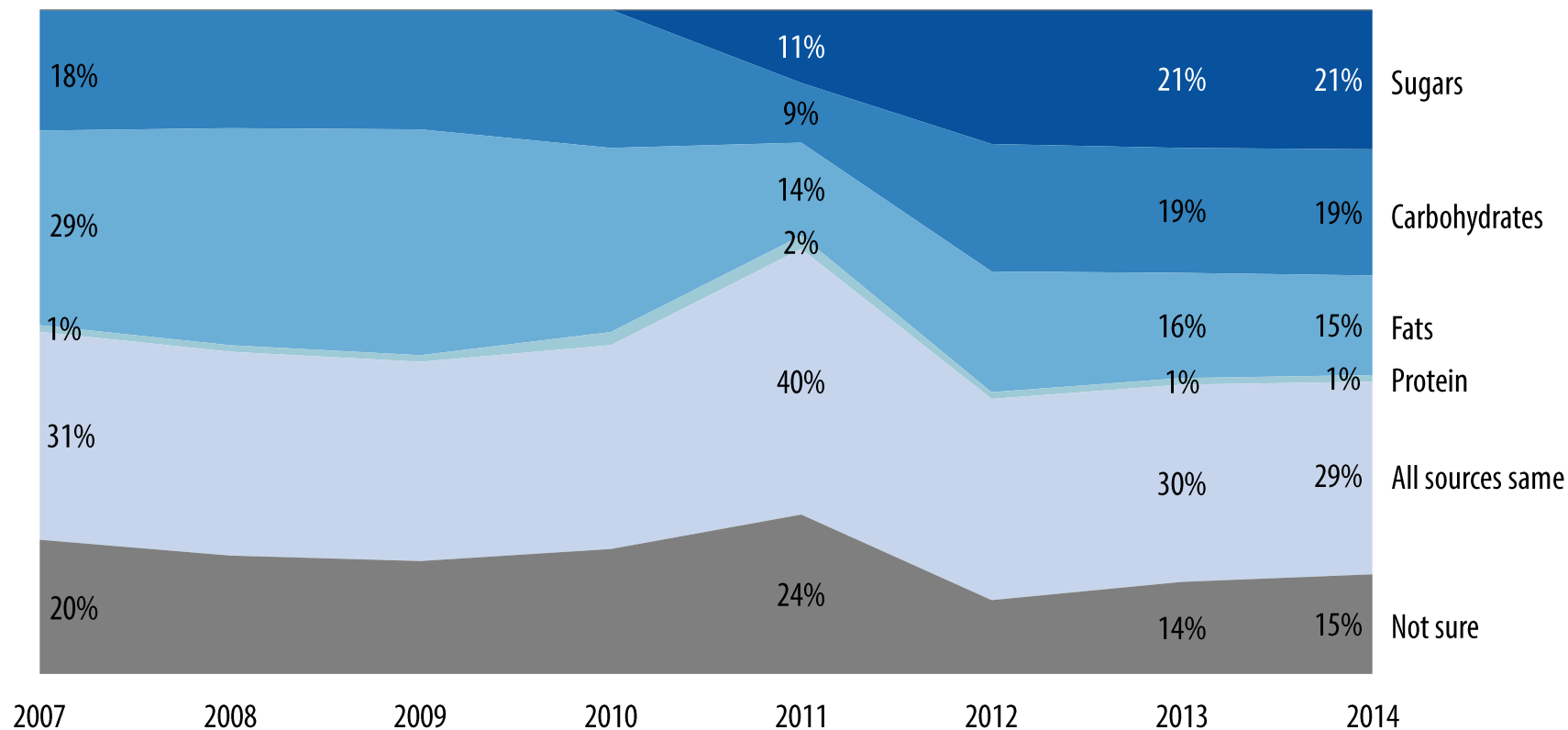


2014 n=1,005; 2013 n=1,006

Arrows indicate significant (.95 level) differences vs. 2013.

Less than a third understand that all sources of calories influence weight gain equally. Two out of five believe that carbohydrates or sugars are the most likely to cause weight gain.

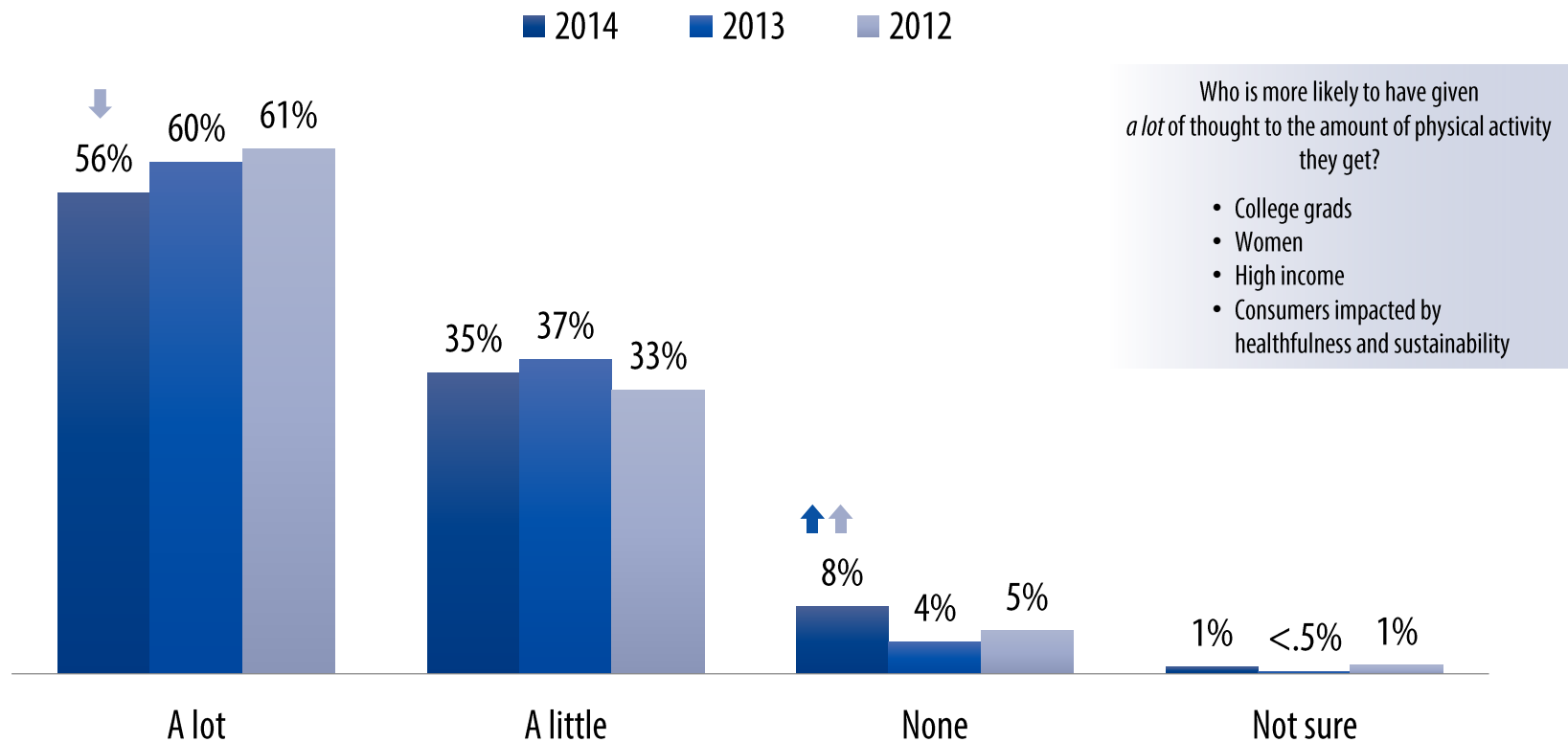
What source of calories are the most likely to cause weight gain?



2014 n=1,005

More than half of all Americans have given *a lot* of thought to the amount of physical activity they get. Compared to 2013, twice as many say they have not thought about physical activity at all in 2014.

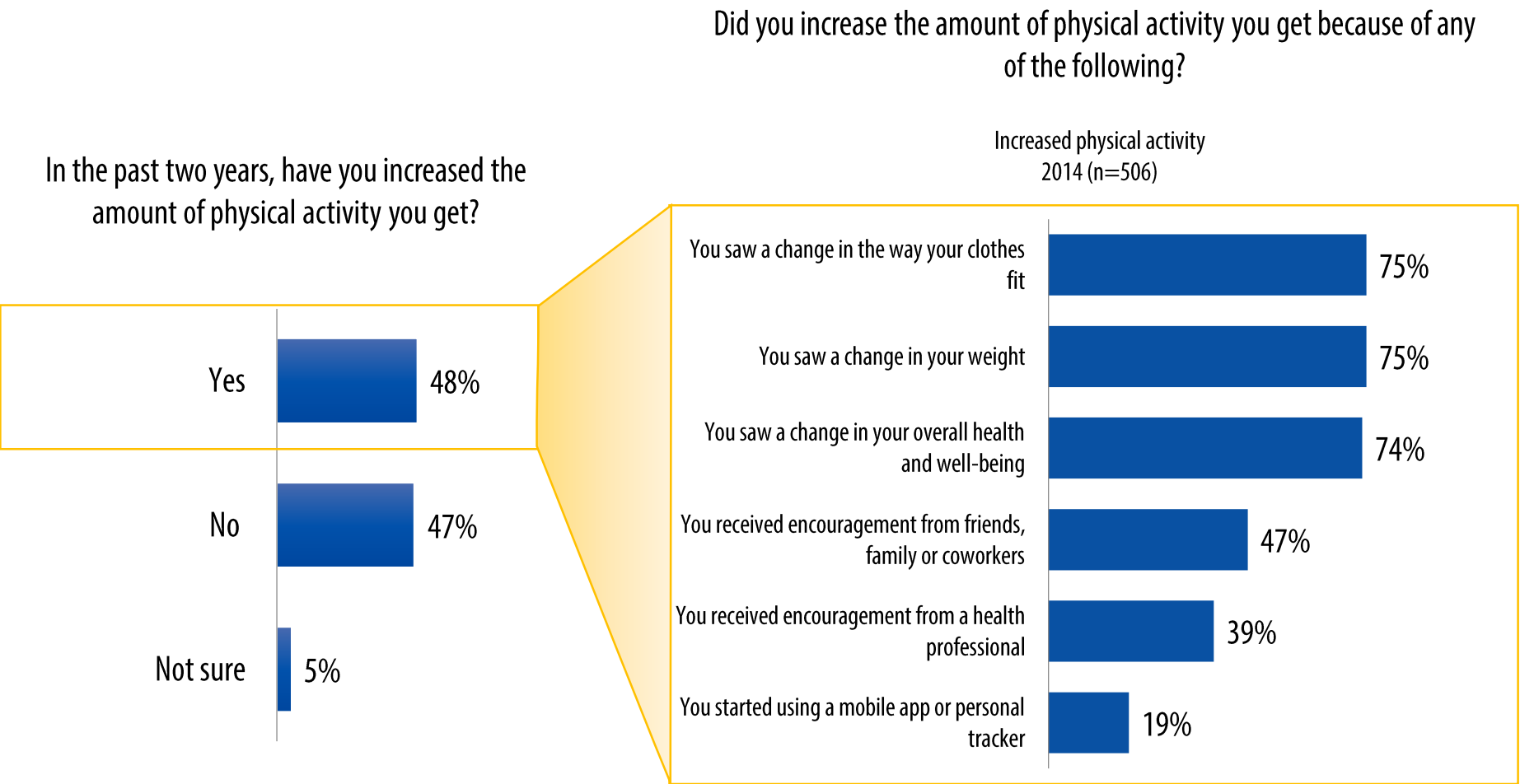
Over the past year, how much thought have you given to the amount of physical activity you get?



2014 n=1,005; 2013 n=1,006; 2012 n=1,057

Arrows indicate significant (.95 level) differences vs. prior year(s); color of arrow indicates comparison year.

Almost half of Americans have increased their physical activity in the past two years. Among those who did increase activity, the most reported reasons include seeing a change in the way clothes fit, a change in weight, and a change in health.



THE PULSE OF AMERICA'S DIET



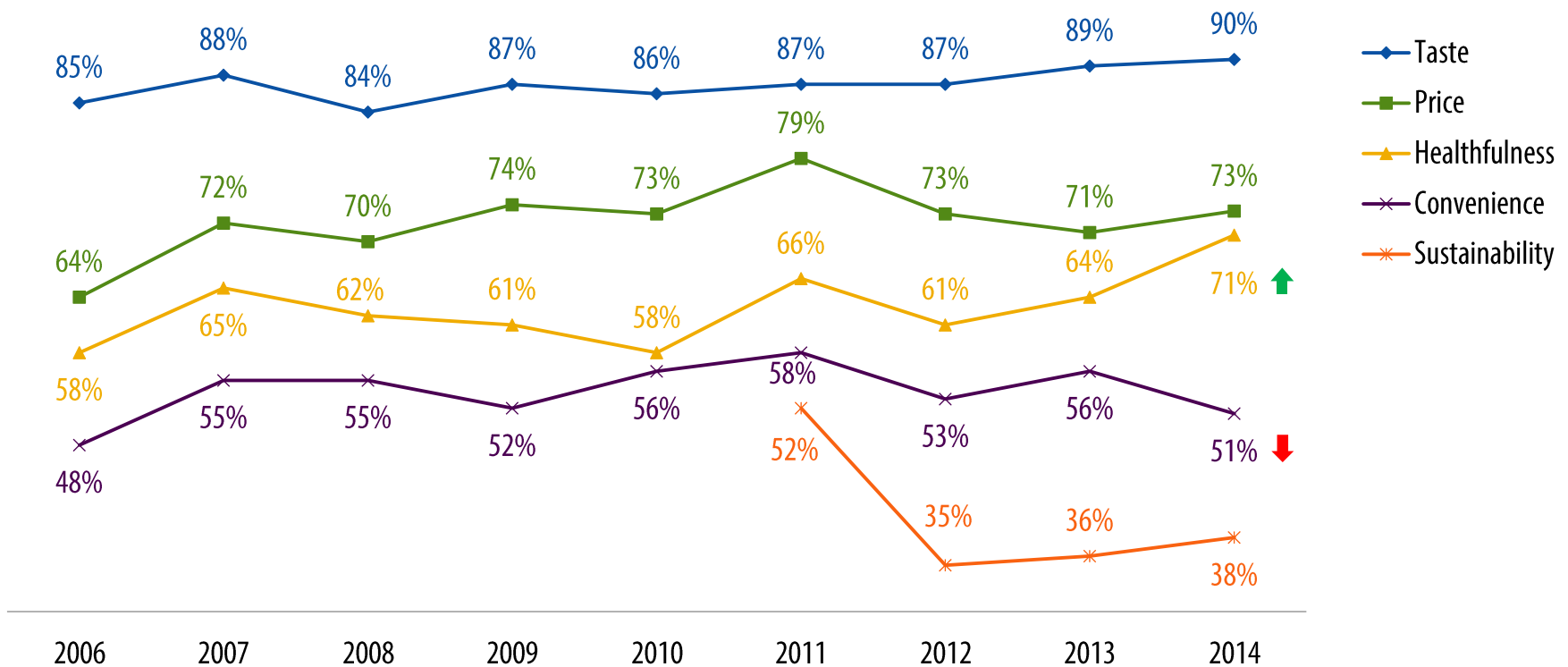
Information Sources & Influences



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Taste, price, and healthfulness continue to drive food selection.

How much of an impact do the following have
on your decision to buy foods and beverages?
(% Rating 4 to 5 on 5-point scale, from *No Impact* to *A Great Impact*)

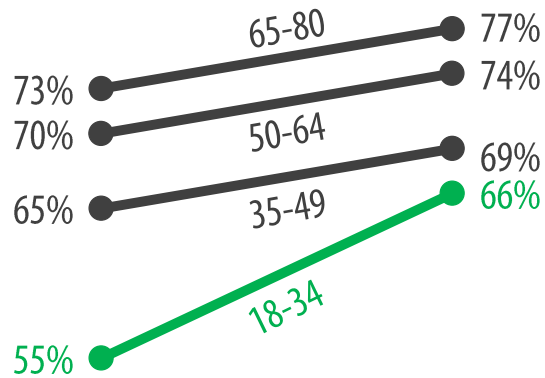


2014 n=1,005

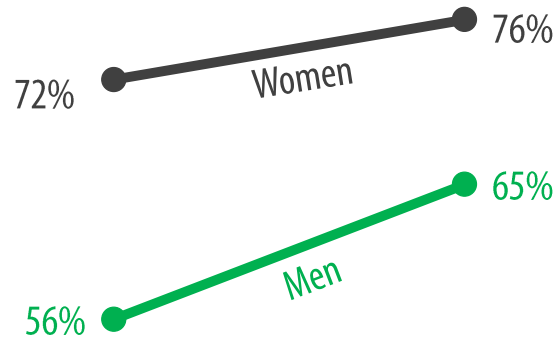
Arrows indicate significant (.95 level) differences vs. 2013.

The increase in healthfulness impact is most pronounced among younger consumers and men.

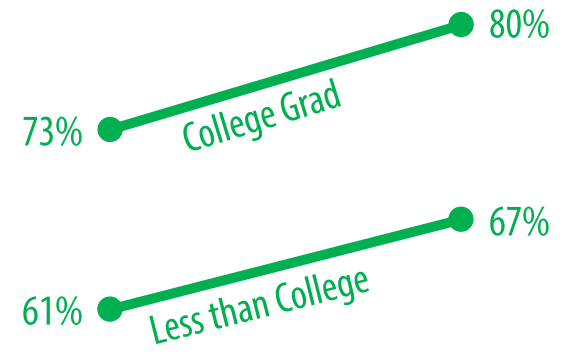
Healthfulness Impact by Age



Healthfulness Impact by Gender



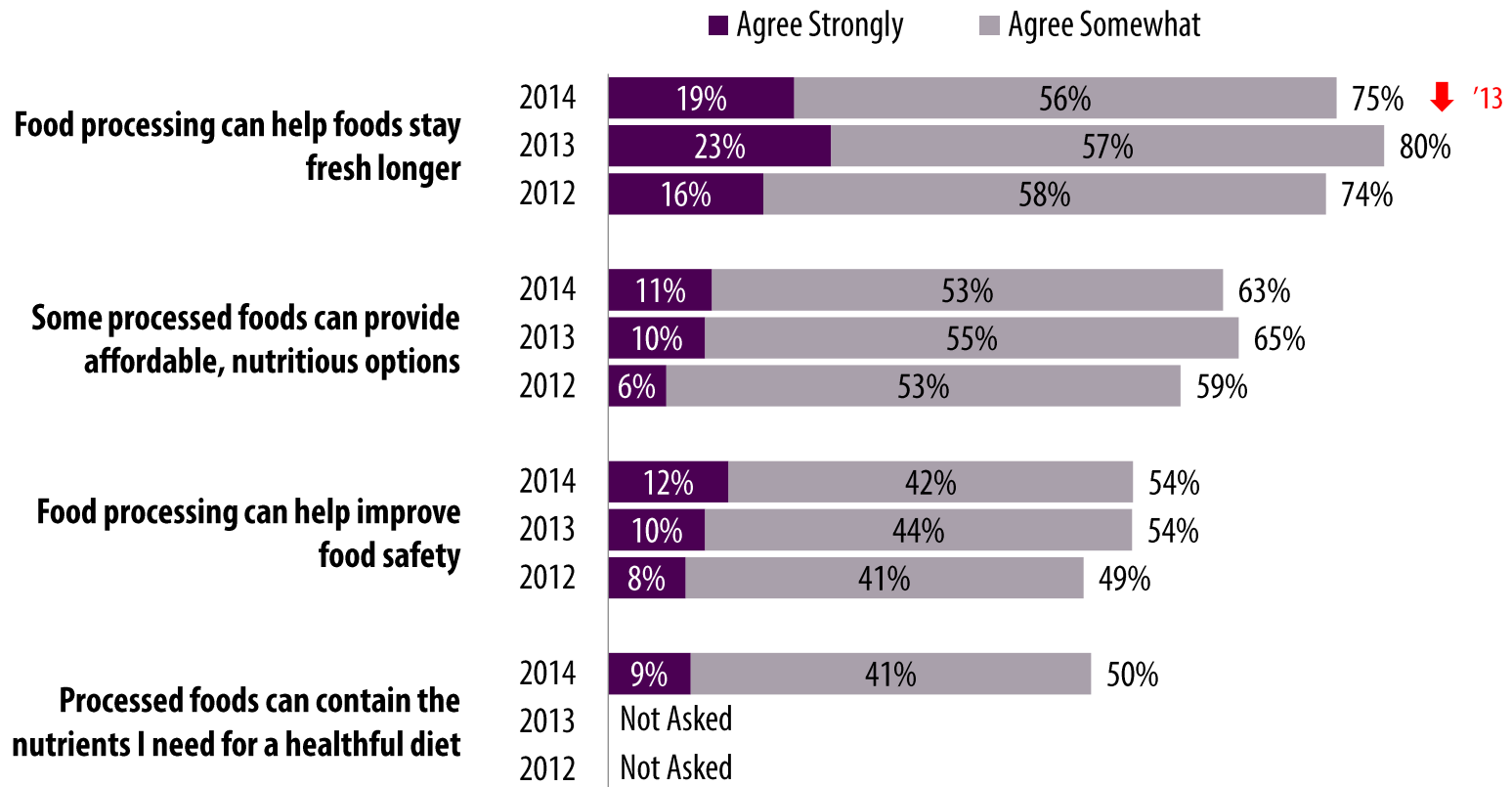
Healthfulness Impact by Education



Green lines indicate significant (.95 level) differences vs. 2013.

Three-quarters of Americans now believe that processed foods can help food stay fresh longer, which is consistent with 2012 findings. Only half of Americans believe that processed foods can contain nutrients needed for a healthful diet.

In general, to what extent do you agree or disagree with the following statements about processed foods?

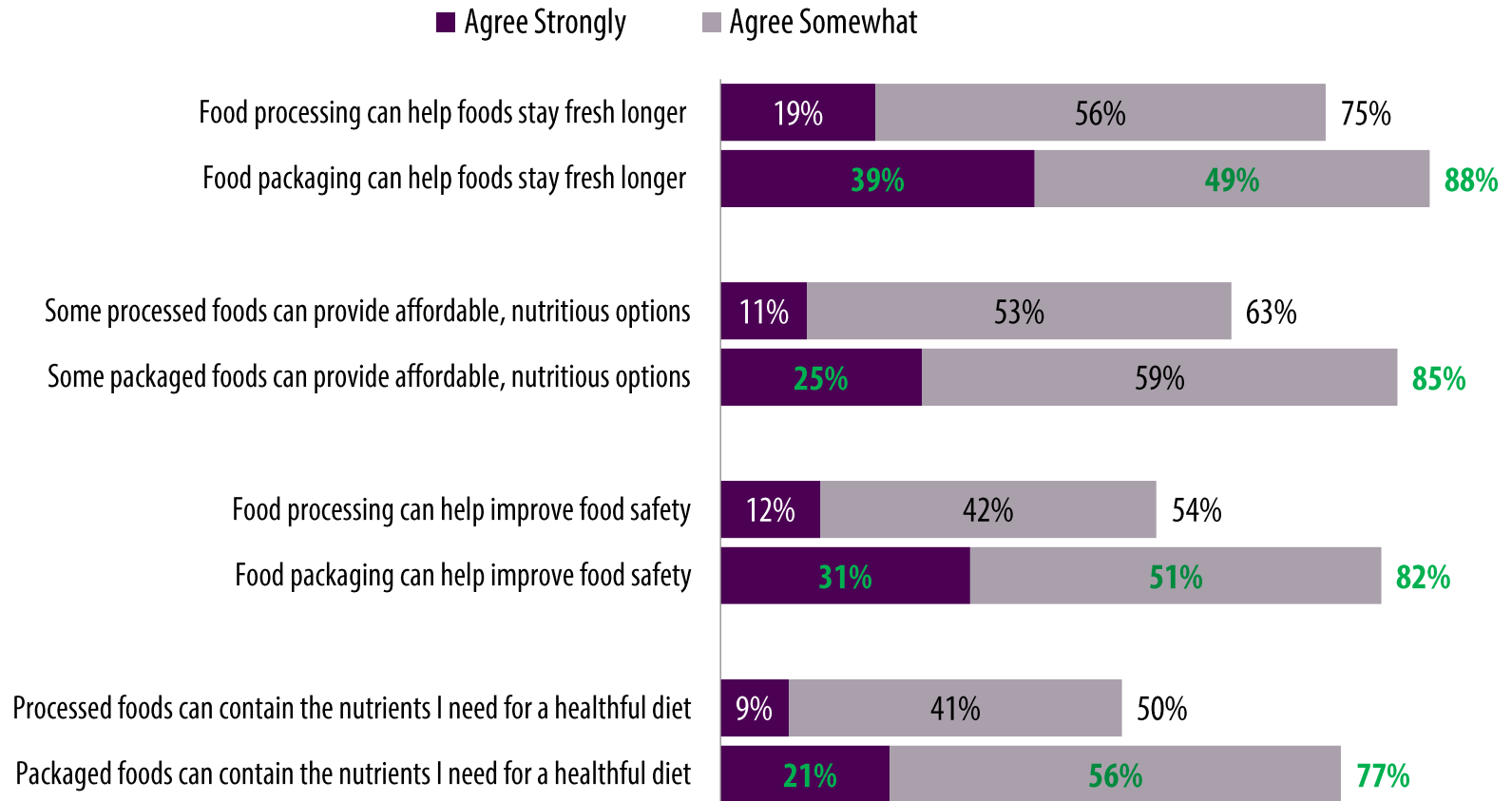


2014 n=503 (Split Sample); 2013 n=1,006; 2012 n=1,057

Arrows indicate significant (.95 level) differences vs. prior year(s); comparison year is labeled.

Significantly more Americans agree with the statements about packaged foods, when compared to the food processing statements.

Split Sample Test: Processed vs. Packaged

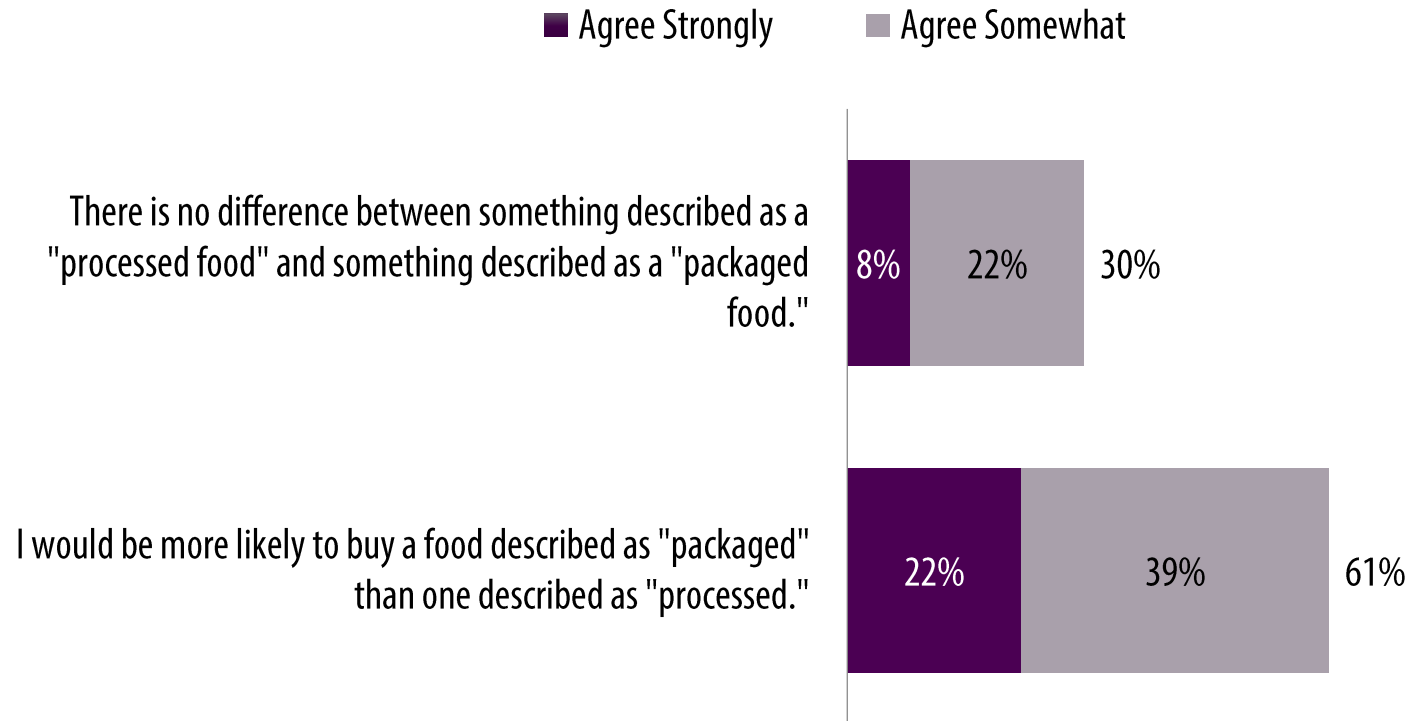


Processed n=503; Packaged n=502

Green indicates significant (.95 level) differences vs. split sample comparison.

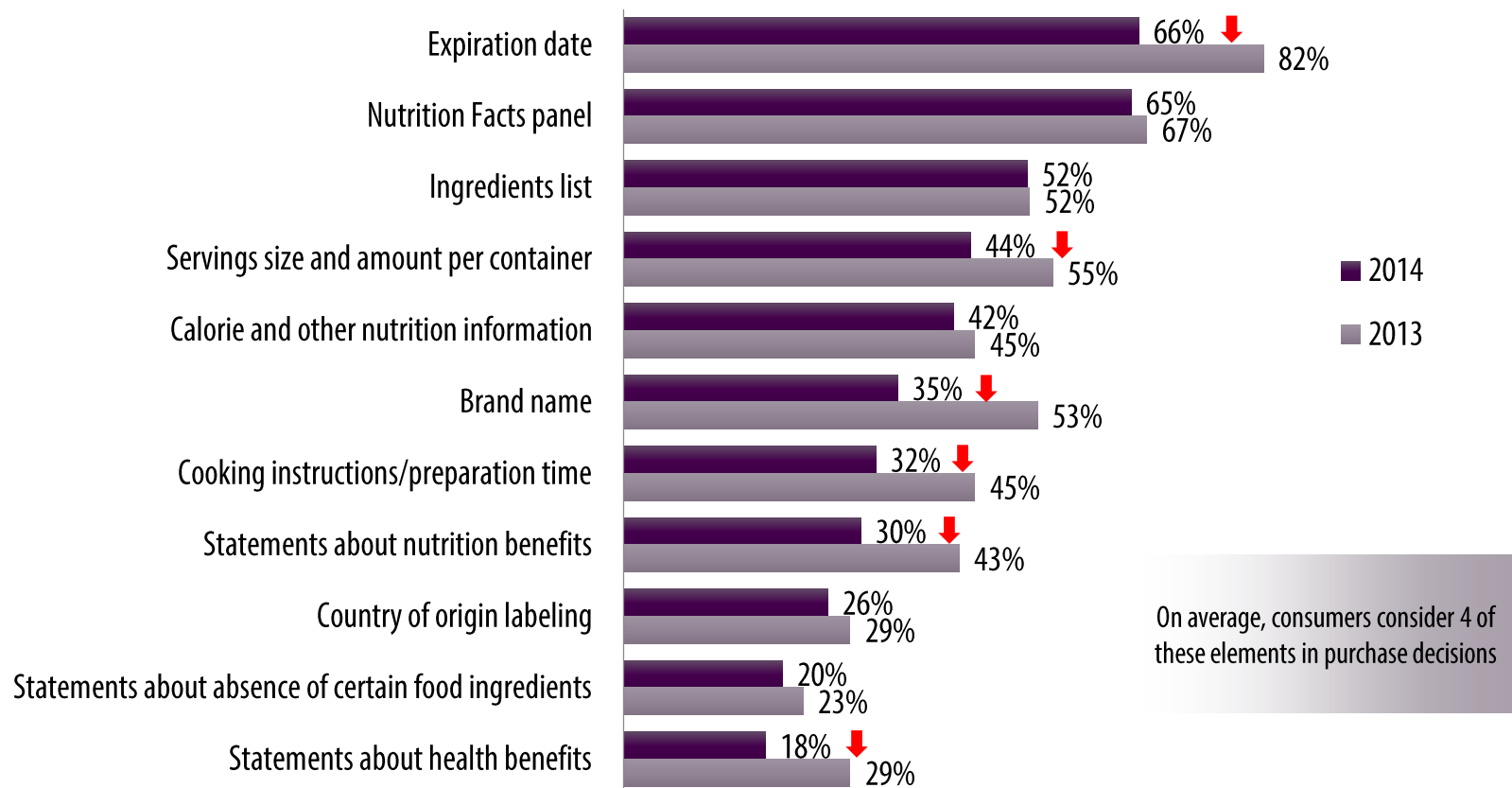
Most consumers perceive a difference between processed and packaged foods. Six in ten are more likely to choose packaged.

To what extent do you agree or disagree with the following statements?



Two-thirds of Americans look at the expiration date, which is a substantial drop from 2013. Expiration date and Nutrition Facts panel continue to be the most reviewed information when deciding to purchase food or beverages.

What information do you look at on the food or beverage package when deciding to purchase or eat a food or beverage? (Select all that apply.)



2014 n=1,005; 2013 n=1,006

Arrows indicate significant (.95 level) differences vs. 2013.

The percentage of Americans reviewing the expiration date, serving sizes, brand names, cooking instructions, and statements about benefits have decreased since 2013.

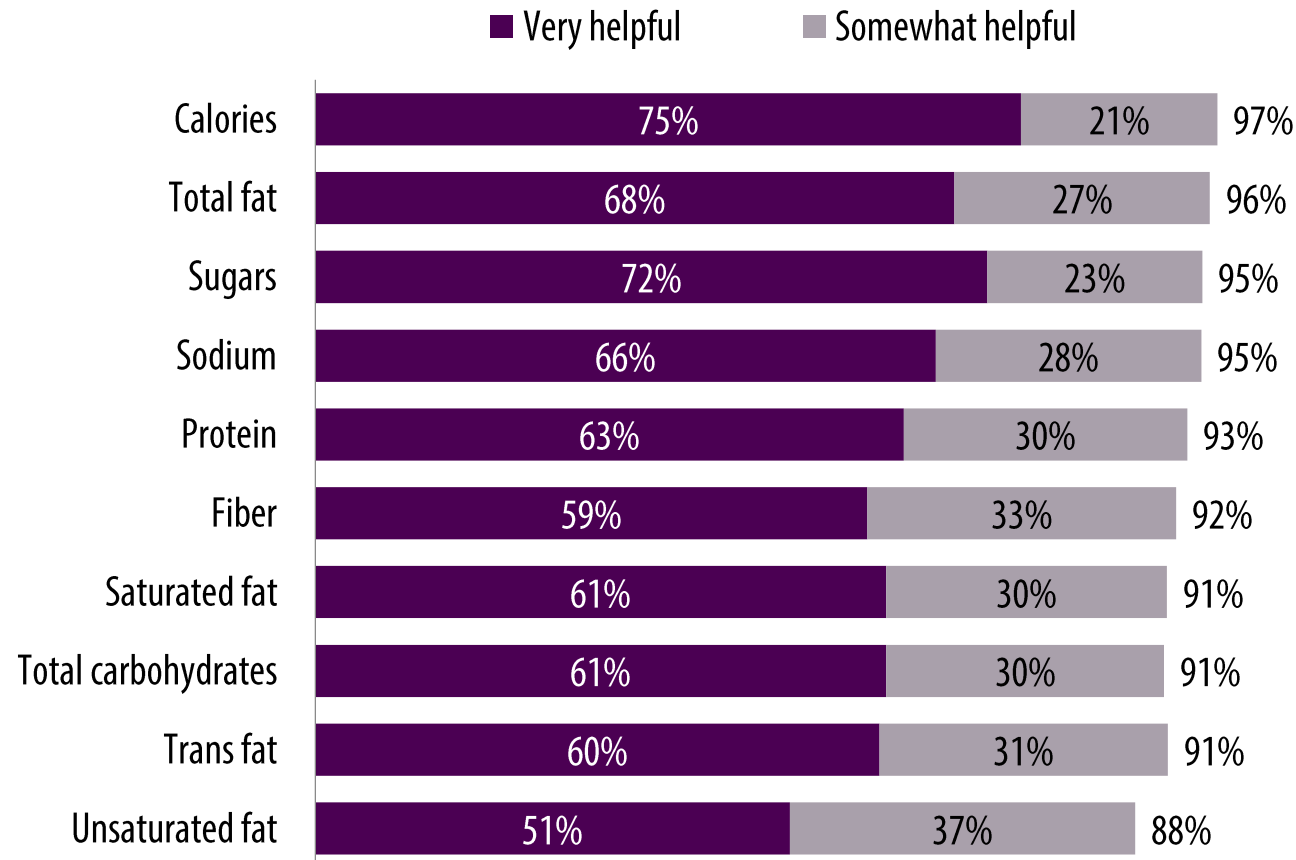
What information do you look at on the food or beverage package when deciding to purchase or eat a food or beverage? *(Select all that apply.)*

	2007 (n=1,000)	2008 (n=1,000)	2009 (n=1,064)	2010 (n=1,006)	2011 (n=1,000)	2012 (n=1,057)	2013 (n=1,006)	2014 (n=1,005)
Expiration date	69%	69%	67%	66%	63%	76%	82%	66%
Nutrition Facts panel	66%	63%	69%	68%	68%	66%	67%	65%
Ingredients list	59%	51%	49%	47%	49%	51%	52%	52%
Servings size and amount per container						50%	55%	44%
Calorie and other nutrition information						48%	45%	42%
Brand name	44%	40%	50%	50%	50%	46%	53%	35%
Cooking instructions/preparation time					33%	45%	45%	32%
Statements about nutrition benefits	44%	43%	29%	29%	31%	42%	43%	30%
Country of origin labeling							29%	26%
Statement about the absence of certain food ingredients						24%	23%	20%
Statements about health benefits	28%	27%	20%	22%	24%	30%	29%	18%

Green indicates significantly higher (.95 level) percentage vs. 2014.

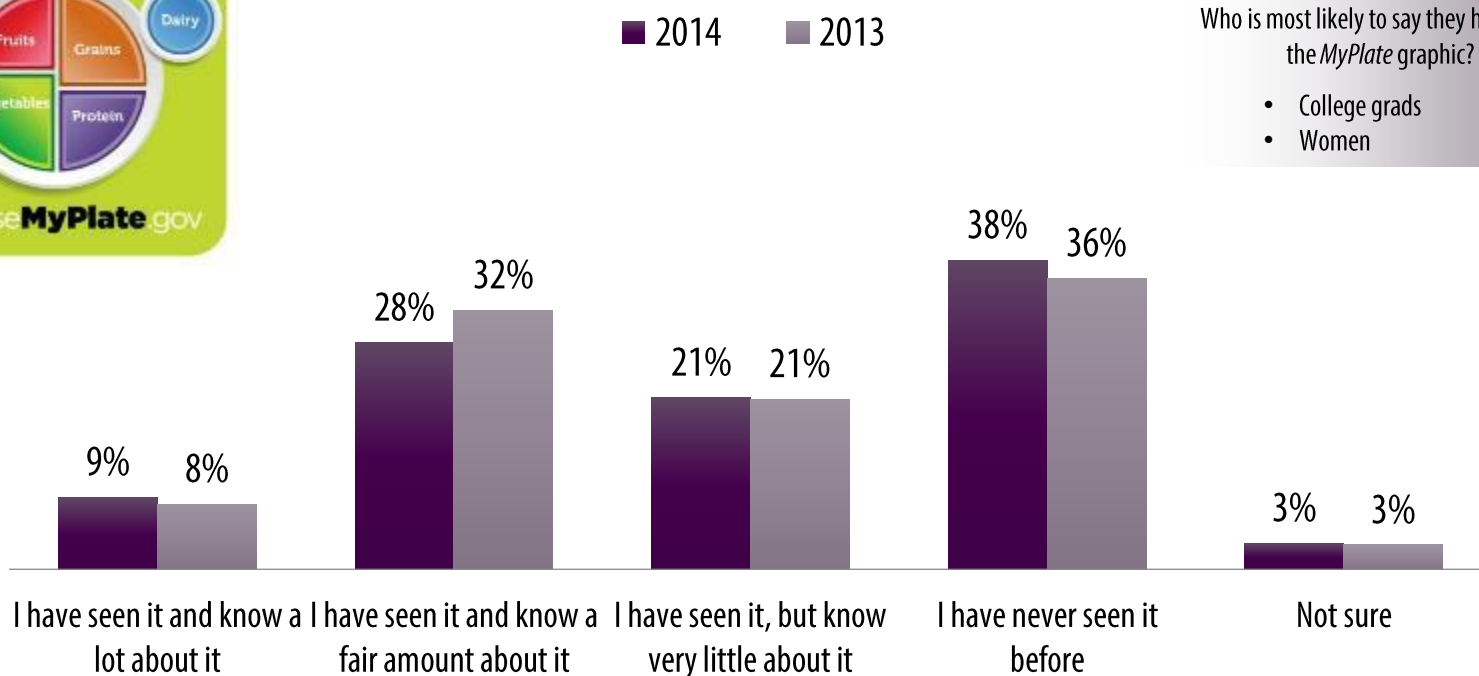
Appreciation for the Nutrition Facts panel is nearly universal for all the ingredients specifically asked about.

How helpful, if at all, is the following information on the Nutrition Facts panel in your decisions to buy foods and beverages?



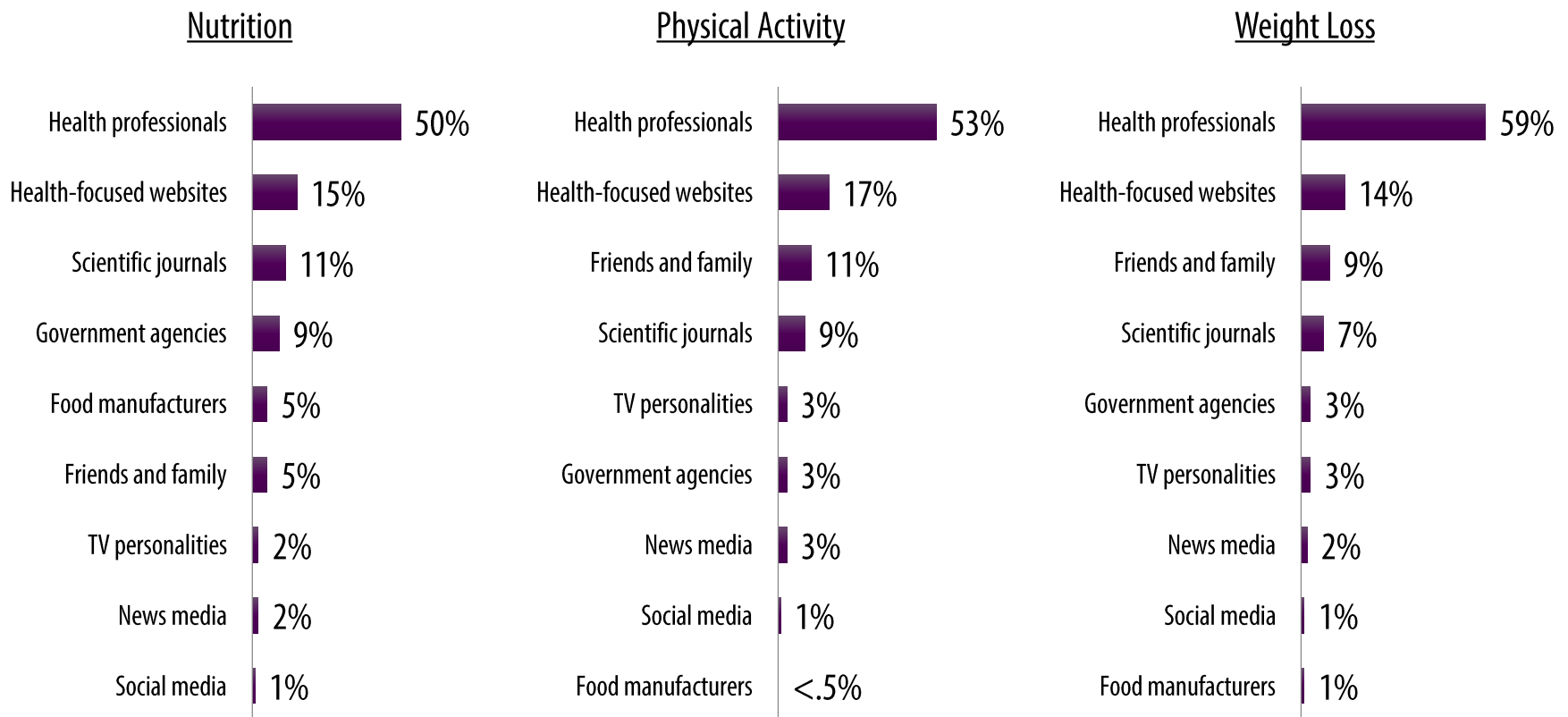
Three out of five Americans recognize the *MyPlate* graphic, with more than a third of all Americans report knowing something (*a lot/ a fair amount*) about it.

How familiar are you, if at all, with the following graphic?



Americans are most likely to trust that health professionals will provide accurate information about weight loss, physical activity, and nutrition.

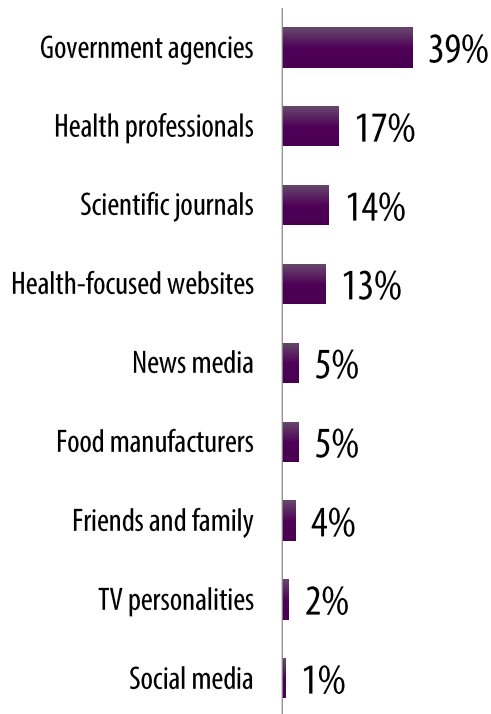
Which one of these sources would you *trust the most* to provide accurate information about the following issues?



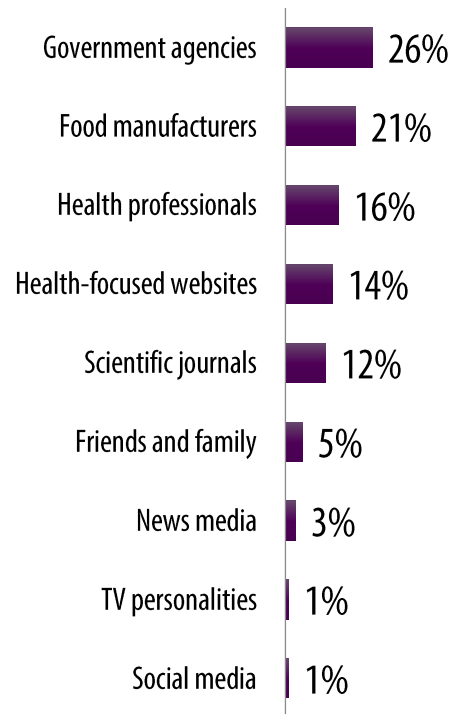
On the other hand, Americans trust the U.S. government the most when it comes to food safety, food ingredients, and the way foods are produced and farmed.

Which one of these sources would you *trust the most* to provide accurate information about the following issues?

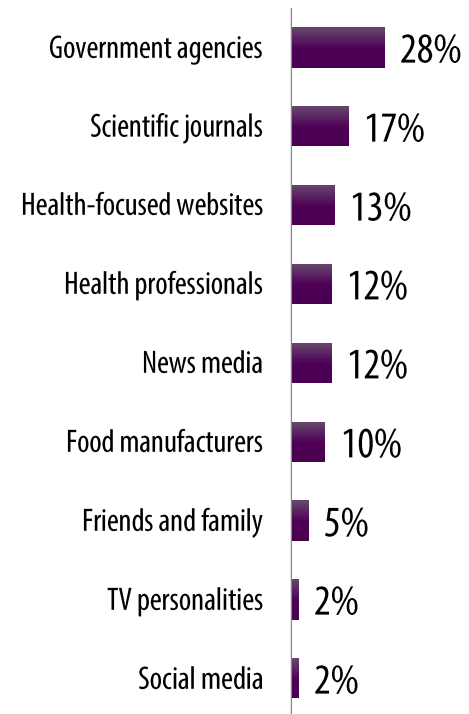
Food Safety



Food Ingredients

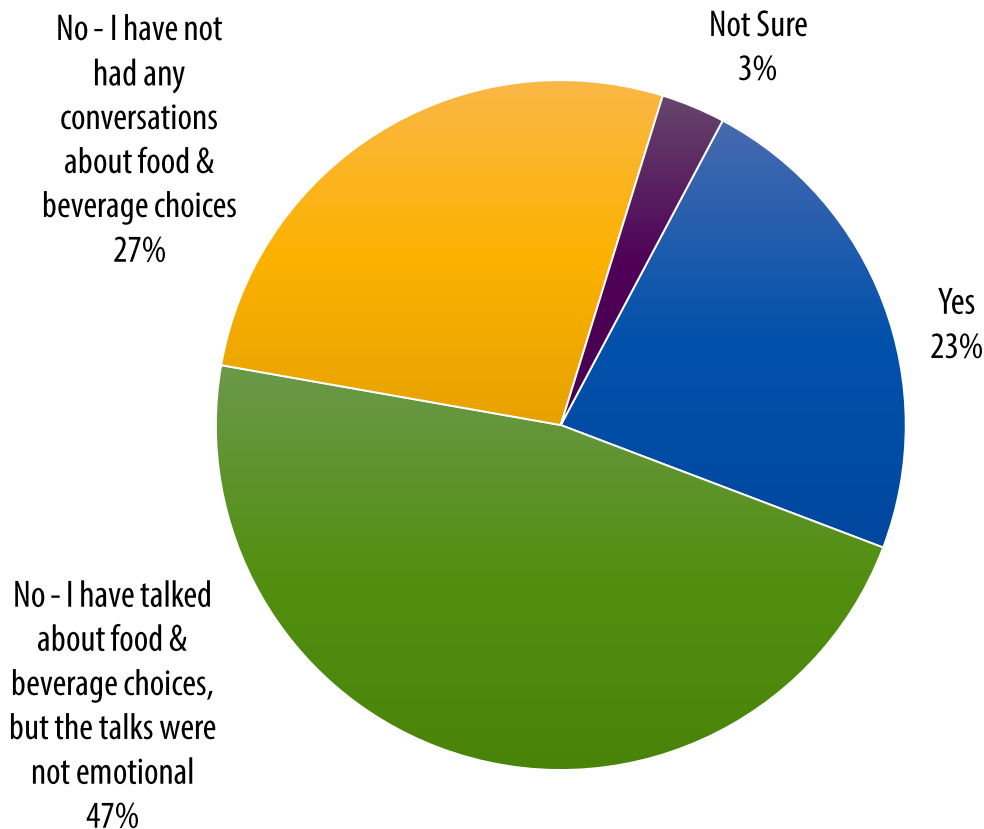


The Ways Foods and Beverages are Farmed and Produced



Three in four Americans have not had an emotional conversation about food and beverage choices in the last six months.

In the last 6 months, have you had an emotional conversation with someone about food and beverage choices?



Nearly a quarter of consumers have had recent emotional conversations about food. Who are they?

WHO ARE THEY?

- Those who have had emotional conversations about food are younger on average (about 43), more likely to be female, and more likely to have kids in the household (35% vs. 27% of those who didn't have emotional conversations and 22% of those who didn't have any conversations about food).
- They are also much more likely to be trying to lose weight (71% vs. 54% and 40% of the two comparison groups) and to report having made an effort to cut added sugars, salt, solid fats, and full-fat dairy, and to eat smaller portions and balance their calories.

WHAT CONCERNS THEM?

- These consumers are clearly passionate about food and have put a great deal of thought into the products they buy and consume. They are more likely than other consumers to have put a lot of thought into the healthfulness, ingredients, sustainability, and safety of their foods and beverages, as well as the ways food is farmed and produced and the amount of physical activity they get. For example, two-thirds of this group have thought a lot about food ingredients, while only 45% of those who don't have emotional conversations and 22% of those who don't discuss food can say the same.
- There is also more planning put into all meal occasions for these consumers – 65% put a lot of thought into dinner, 32% put a lot of thought into lunch, and 26% put a lot of thought into both breakfast and snacks.

HOW DOES THIS IMPACT THEIR BEHAVIOR?

- In comparison to the average consumer, this group's purchasing decisions are heavily influenced by the healthfulness of the food and beverages. 86% of these consumers report healthfulness as having an important impact, ahead of price (which is similarly rated by only 70%) and just shy of taste (92%). Those who do not have emotional food conversations are less likely to rate healthfulness as this impactful and only about half of those who report not having conversations about food say the same.
- While fewer cite sustainability as impacting purchasing decisions (47%), this group is also more likely to cite this as a factor.
- More specifically, more than half of those who have had emotional conversations about food say that they consider 18 different food components when making a decision about purchasing a food. They are especially likely to be looking for fiber, calcium, and protein and especially likely to avoid or limit added sugars or sugars in general, high fructose corn syrup, saturated fats, and preservatives. In comparison, there is no food component that is considered during purchasing by more than half of those who do not have emotional food conversations.
- This group is also more likely to use nutritional information when eating out at restaurants – about two-thirds say they use it in general and a quarter report using it regularly.
- Finally, these consumers are more likely to use health claims on labels when making purchasing decisions and to use labels that indicate that a product is *natural, organic, antibiotic-free, hormone-free, and eco-friendly*.

THE PULSE OF AMERICA'S DIET



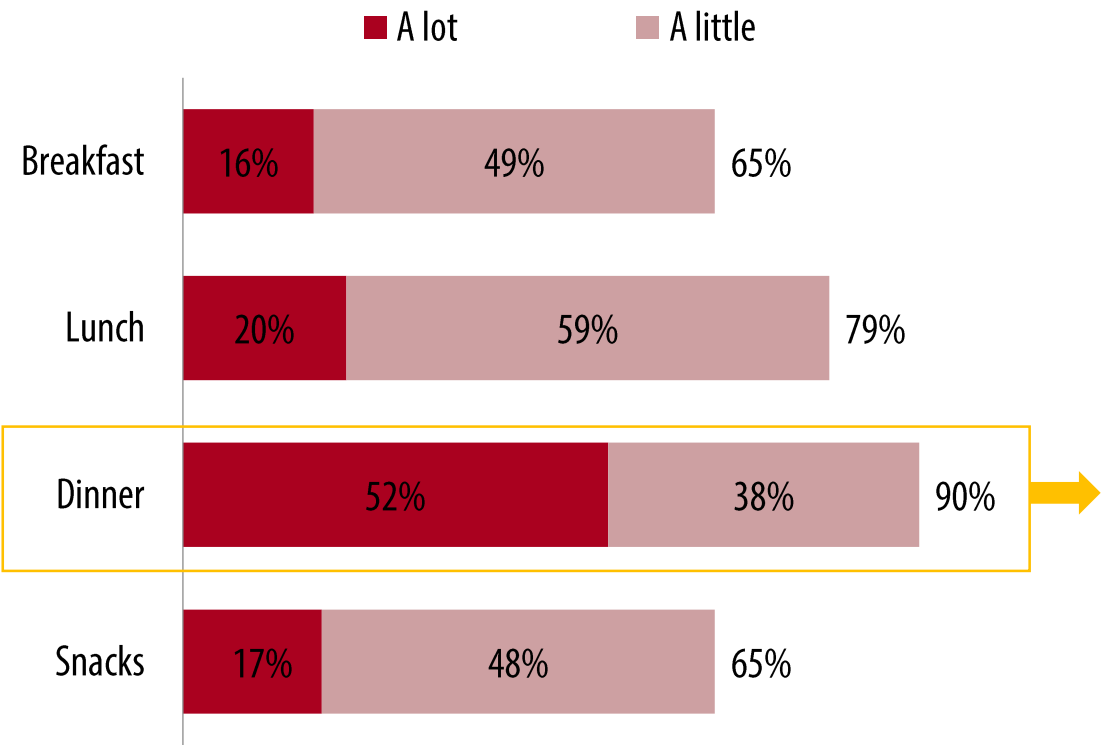
**Restaurant & Meal
Occasions**



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At least three out of five Americans spend some time planning each of their meals. Nine out of ten Americans spend some time planning dinner, making it the most planned meal.

How much thought, if any, would you say you typically devote to planning the following?

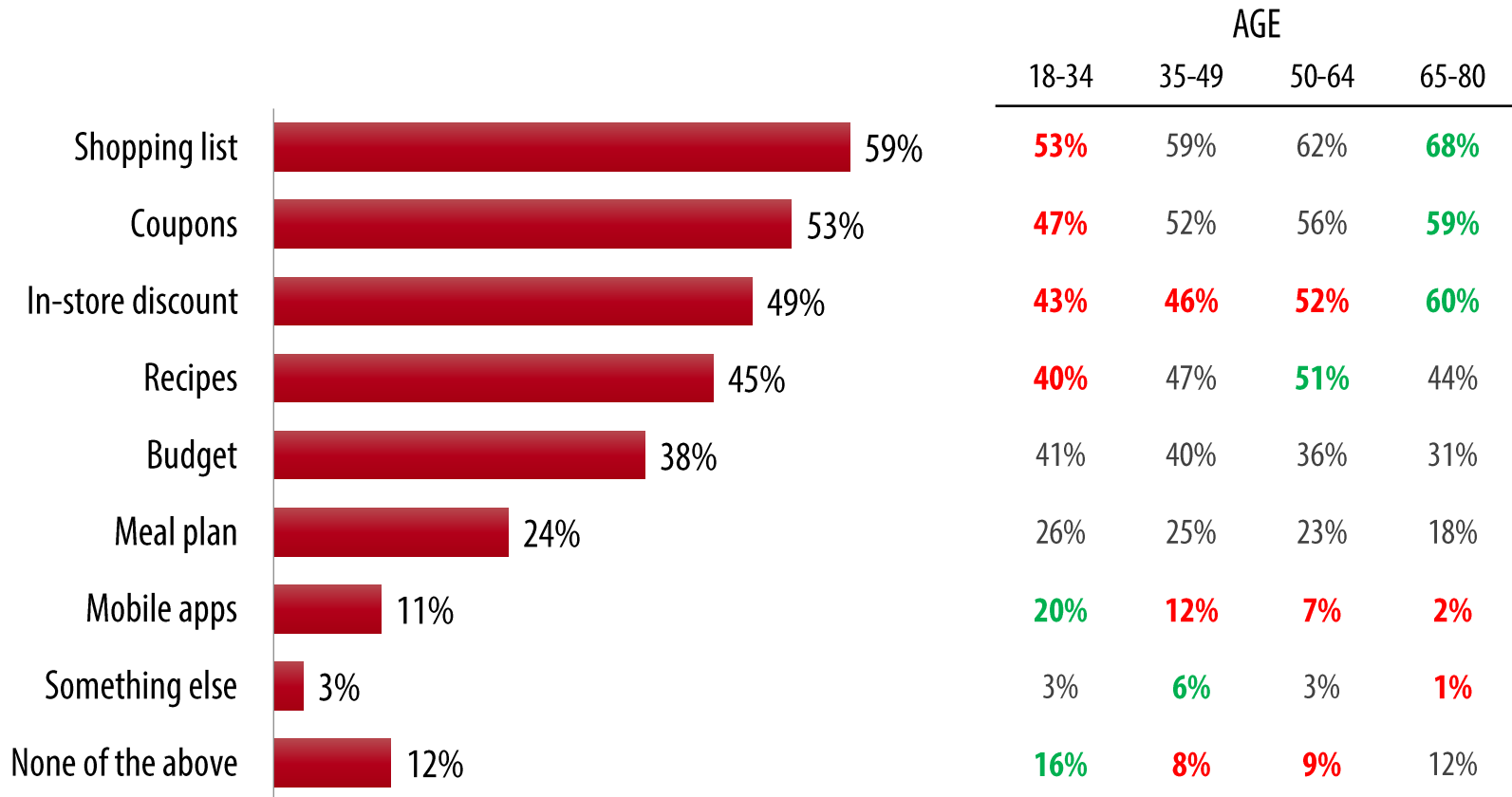


Who is more likely to have given a lot of thought to planning dinner?

- Women
- Excellent or Good Health

Three out of five Americans make shopping lists on a regular basis to help plan what they eat, and half of Americans use coupons or in-store discounts. With about one out of ten reporting, the least popular method for planning meals is using a mobile application.

Which of the following, if any, do you use on a regular basis specifically in order to help you plan what you will eat and drink?
(Select all that apply.)

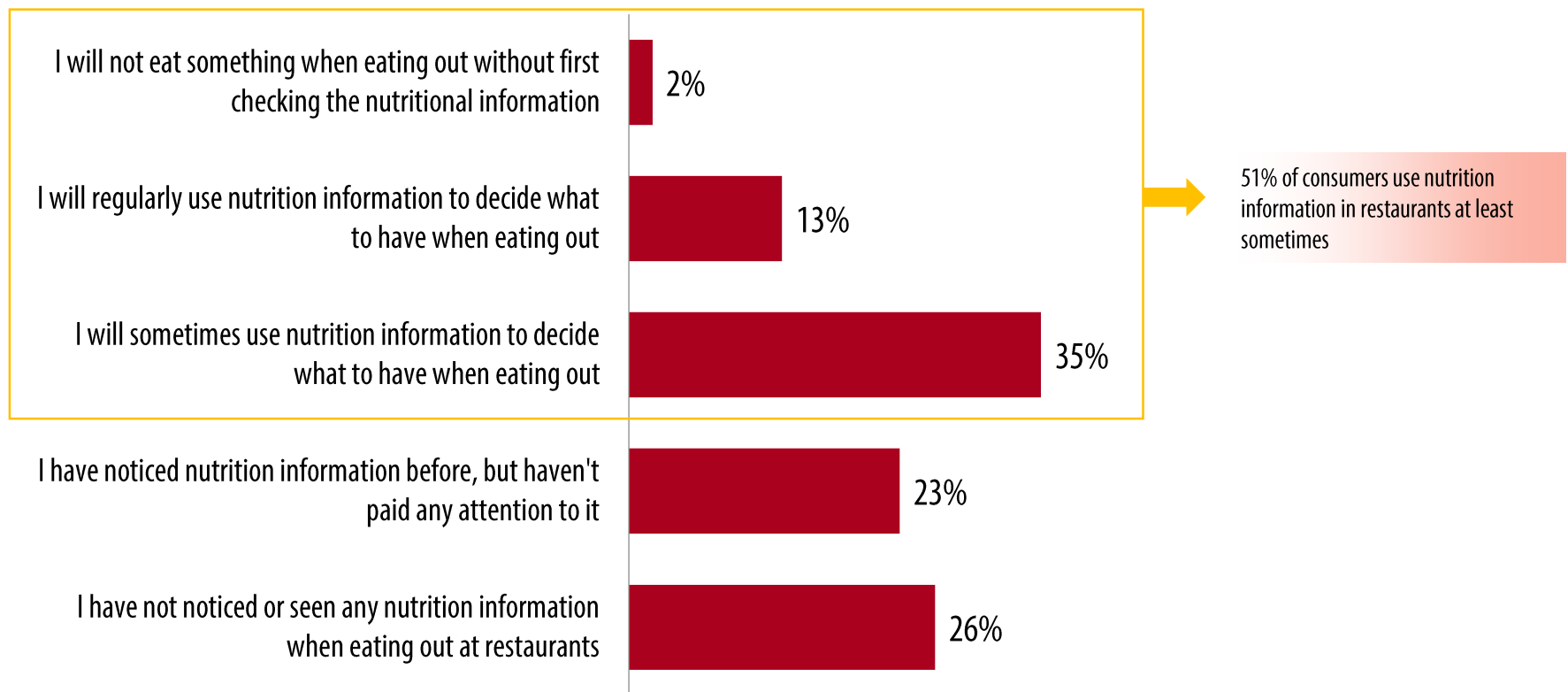


2014 n=1,005

Significant (.95 level) differences between age groups are shown with green/red font. Percentages in red are significantly lower than the percentage in green.

Half of Americans at least sometimes use nutrition information to decide what to have when eating out.

How, if at all, have you used nutrition information (like calorie counts) when eating out at restaurants?



Half of consumers use nutrition information when eating out. Who are they?

WHO ARE THEY?

- Those who pay attention to nutrition information when eating out are more likely to be married, female, and more highly educated. They are also more likely to be trying to lose weight (64% vs. 44%).

WHAT INFORMATION DO THEY PAY ATTENTION TO?

- Consumers who look for nutrition information in restaurants are logically high information seekers in general. But what information do they seek in particular?
- Nearly eight in ten of these consumers look at the Nutrition Facts panel when shopping for foods and beverages (true of only 50% of their counterparts). They are also more likely to look at the ingredients list, servings size/amount per container, calorie and nutritional icons or graphics, statements about nutritional benefits, country of origin labeling, and statements about the absence of certain ingredients.
- In addition, 44% have not only seen the *MyPlate* graphic but also know a fair amount about it. In comparison, this is true for only 30% of their counterparts who don't look for nutrition information in restaurants.
- Calories are clearly important – 61% of this subgroup think about the number of calories they consume “always” or “often” (20% say they always think about it). Similarly 60% of this group state that they try to limit the calories they consume.
- They also put a great deal more planning into every meal of the day. More than six in ten have thought a lot about dinner, for instance, while only 42% of their counterparts do the same. A similar proportion (62%) report having put a lot of thought in the past year into the healthfulness of the foods and beverages they consume and 54% have put a lot of thought into food ingredients.

HOW DOES THIS IMPACT THEIR PURCHASING?

- These consumers are both more likely to say that they believe health claims on labels (and those presented in the media) and that they often use these claims to make purchasing decisions.
- Healthfulness of the foods and beverages in general is also more likely to have an impact on this group. 42% suggest that it has a “great impact” on their decision.
- These consumers are also more likely to report buying foods labeled as *natural*, *organic*, *hormone-free*, *antibiotic-free*, *eco-friendly*, or having added nutrients.

THE PULSE OF AMERICA'S DIET



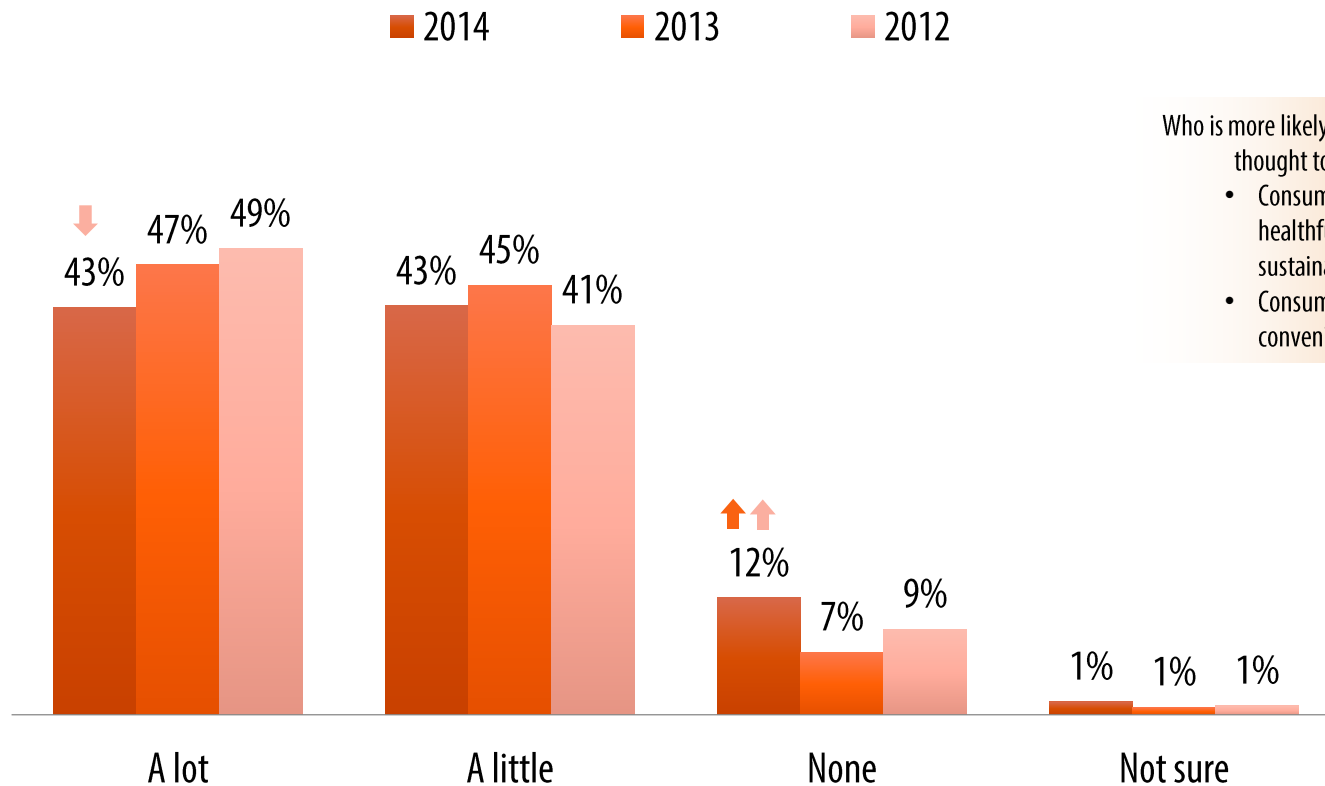
Dietary Components



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Nearly nine out of ten Americans have given some (*a lot/a little*) thought to the ingredients in their foods and beverages in the past year, with two out of five giving *a lot* of thought to the ingredients.

Over the past year, how much thought have you given to the ingredients in your foods and beverages?



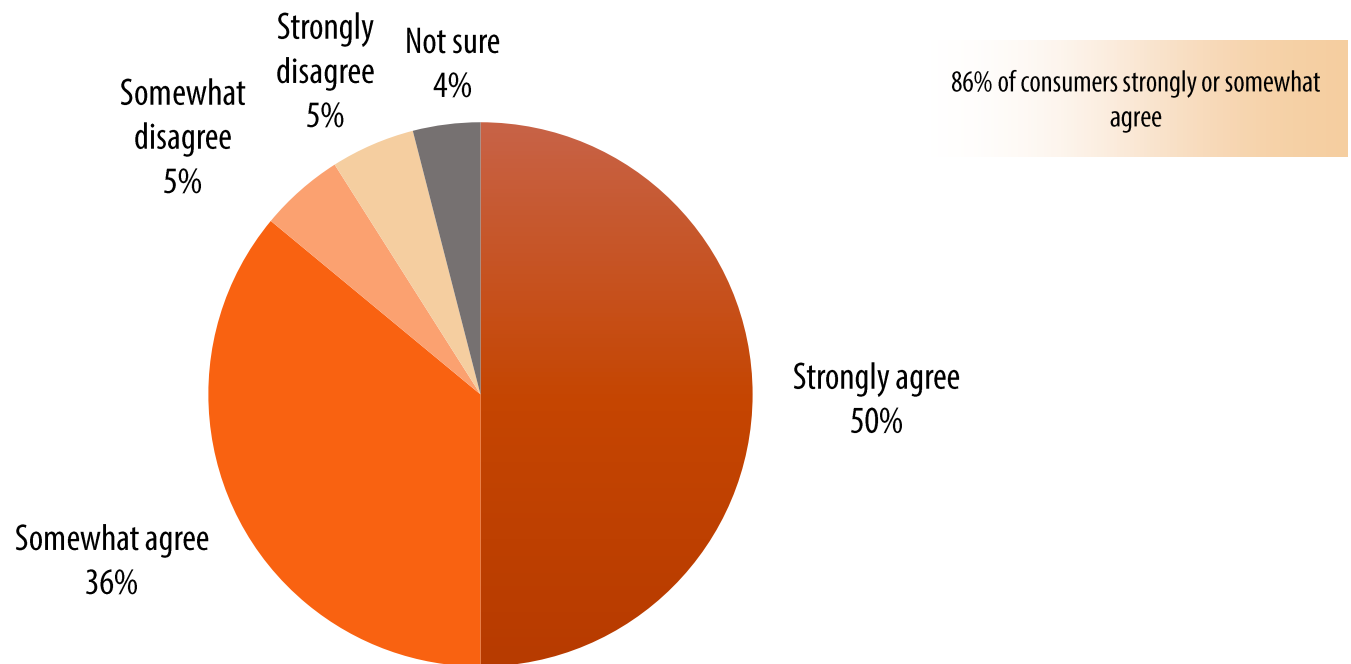
2014 n=1,005; 2013 n=1,006; 2012 n=1,057

Arrows indicate significant (.95 level) differences vs. prior year(s); color of arrow indicates comparison year.

The vast majority of Americans believe they would be able to find information about ingredients in their food if there was something they wanted to know.

Please indicate how much you agree or disagree with the following statement:

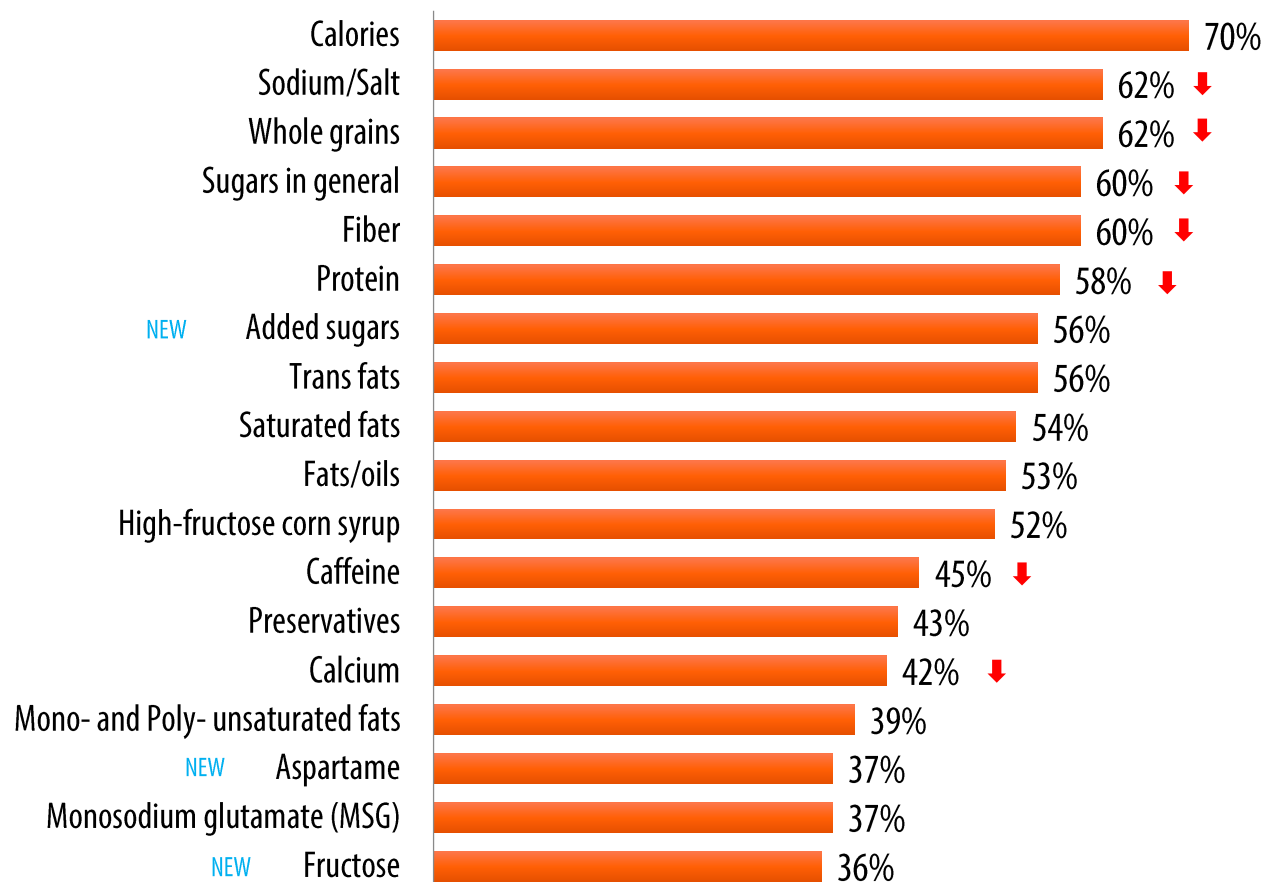
If there was something I wanted to know about an ingredient in my food, I think I would be able to find the information.



Calories, sodium, whole grains, sugars and fiber are the most common food components that Americans have considered in the past twelve months.

Thinking back about the past twelve months, when making decisions about buying packaged food or beverages, have you ever considered whether or not they contain the following?

(% Yes)

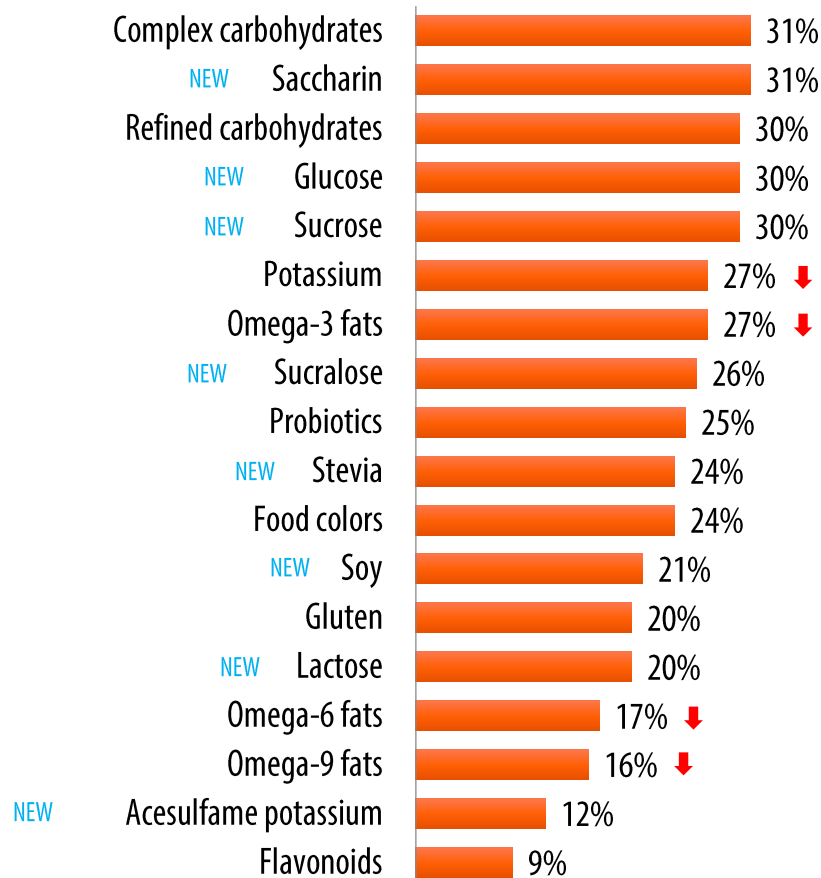


2014 n=1,005; Arrows indicate significant (.95 level) differences vs. 2013.

Less than one in five Americans has considered Omega-6, Omega-9, acesulfame potassium, or flavonoids when purchasing foods or beverages in the past twelve months.

Thinking back about the past twelve months, when making decisions about buying packaged food or beverages, have you ever considered whether or not they contain the following?

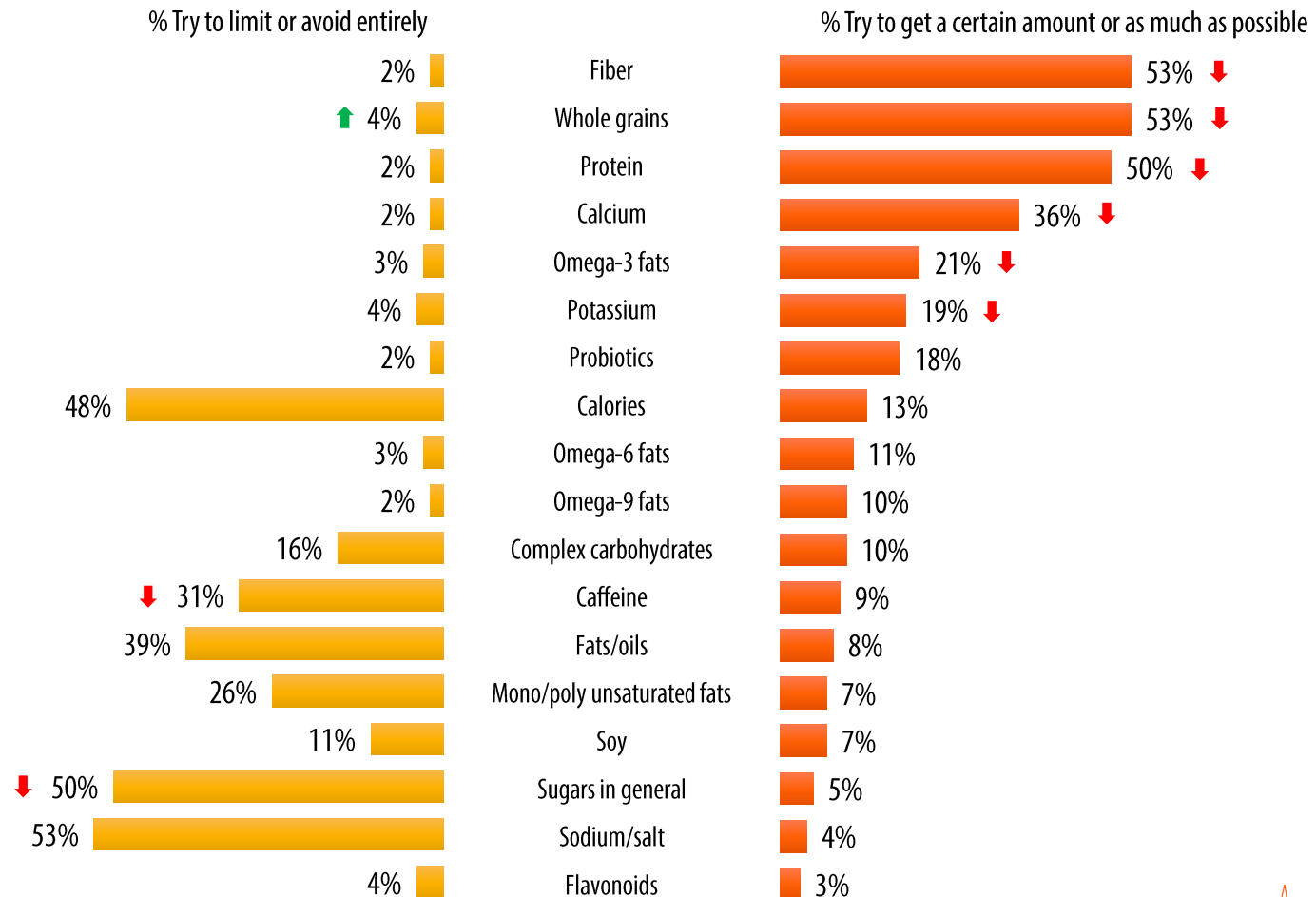
(% Yes)



2014 n=1,005; Arrows indicate significant (.95 level) differences vs. 2013.

Half of all Americans make an effort to avoid sugars and salts, while slightly more than half of Americans try to consume fiber and whole grains.

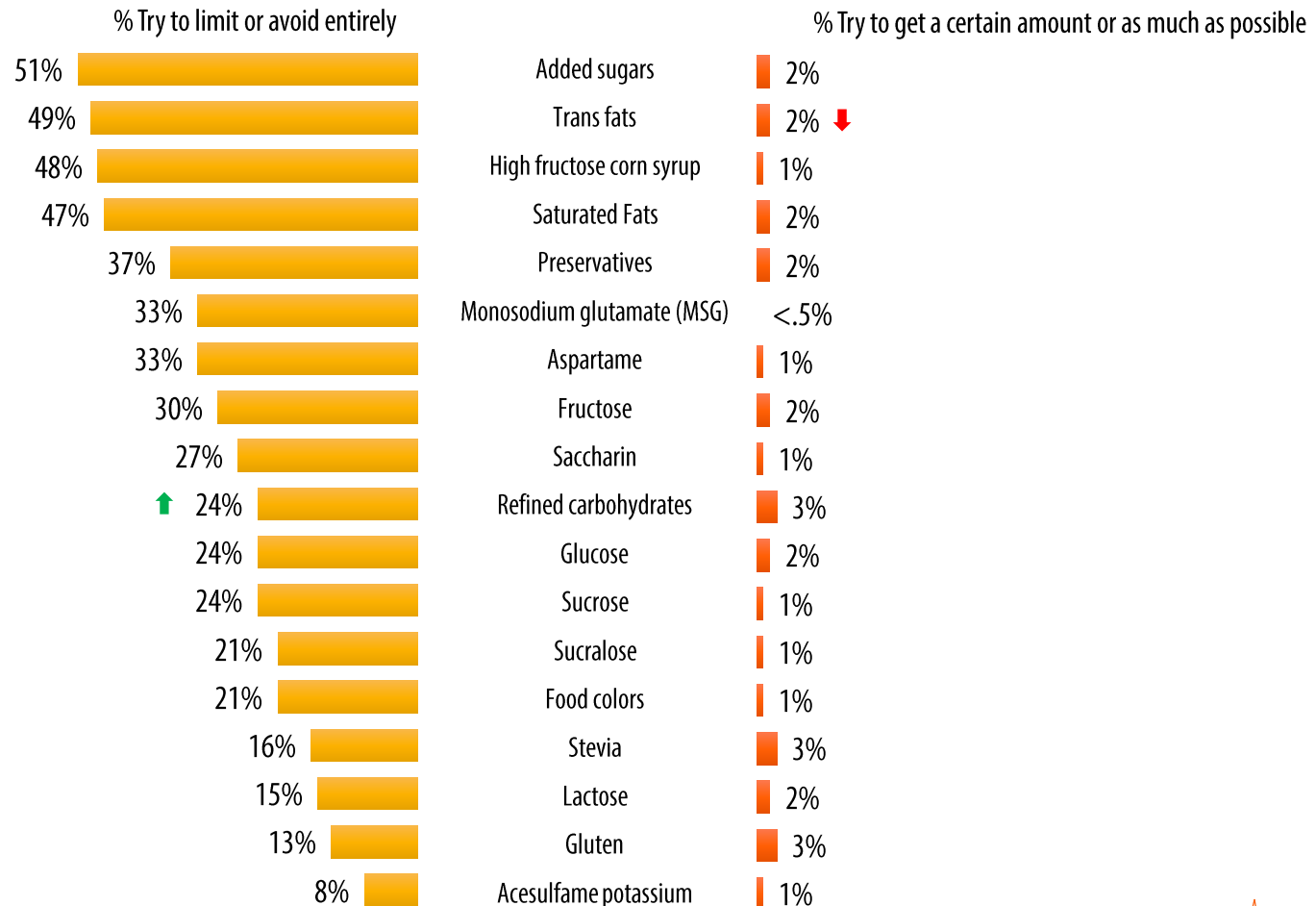
To what extent do you try to consume or avoid the following?



2014 n=1,005; Arrows indicate significant (.95 level) differences vs. 2013.

More than a third of Americans try to avoid preservatives, saturated fats, trans fats, added sugars, and high-fructose corn syrup.

To what extent do you try to consume or avoid the following?



2014 n=1,005; Arrows indicate significant (.95 level) differences vs. 2013.

THE PULSE OF AMERICA'S DIET



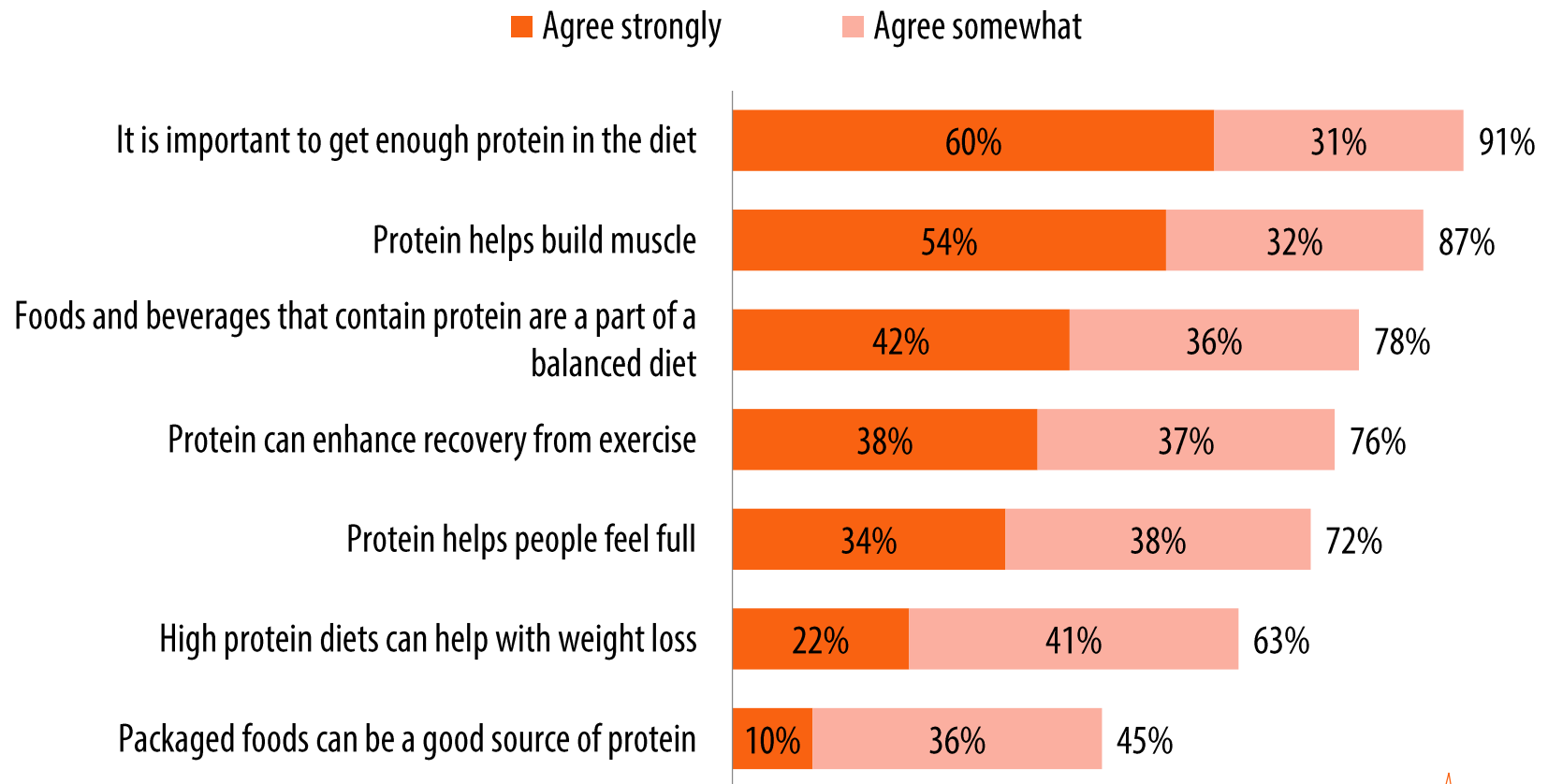
Dietary Components: PROTEIN



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COUNCIL FOUNDATION

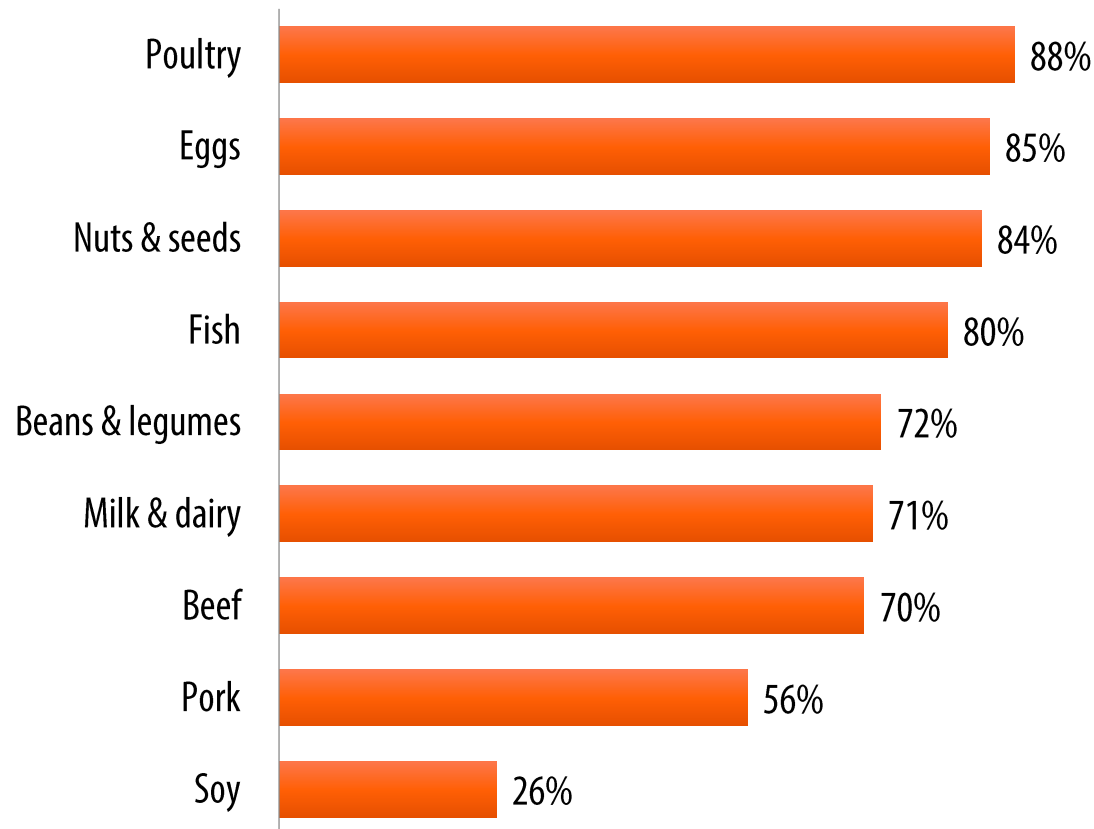
Most Americans agree that it's important to consume enough protein in their diet, and that protein can help build muscle. Three-quarters believe that protein is part of a balanced diet, it can enhance recovery from exercise, and it helps people feel full.

To what extent do you agree or disagree with the following statements about protein?



Among those who are trying to consume protein, more than four out of five get protein from poultry, eggs, nuts & seeds, and fish. The least likely source of protein is soy, with only one in four reporting it as a source.

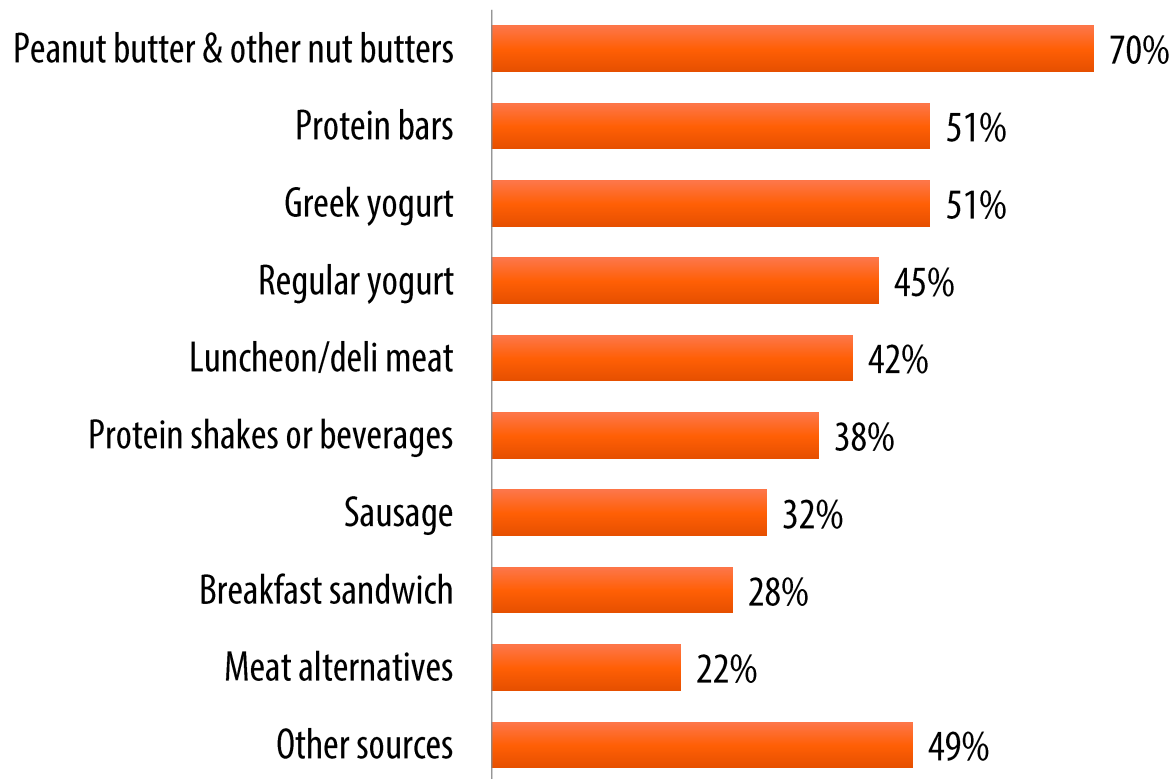
Earlier you stated that you are trying to ensure you consume at least a certain amount of protein. What sources of protein are you trying to consume? *(Select all that apply.)*



Tries to consume at least a certain amount of protein: 2014 n=531

More than two-thirds report peanut butter and other nut butters as specific food products they consume to get protein. Meat alternatives are the least likely source with less than a quarter of Americans reporting.

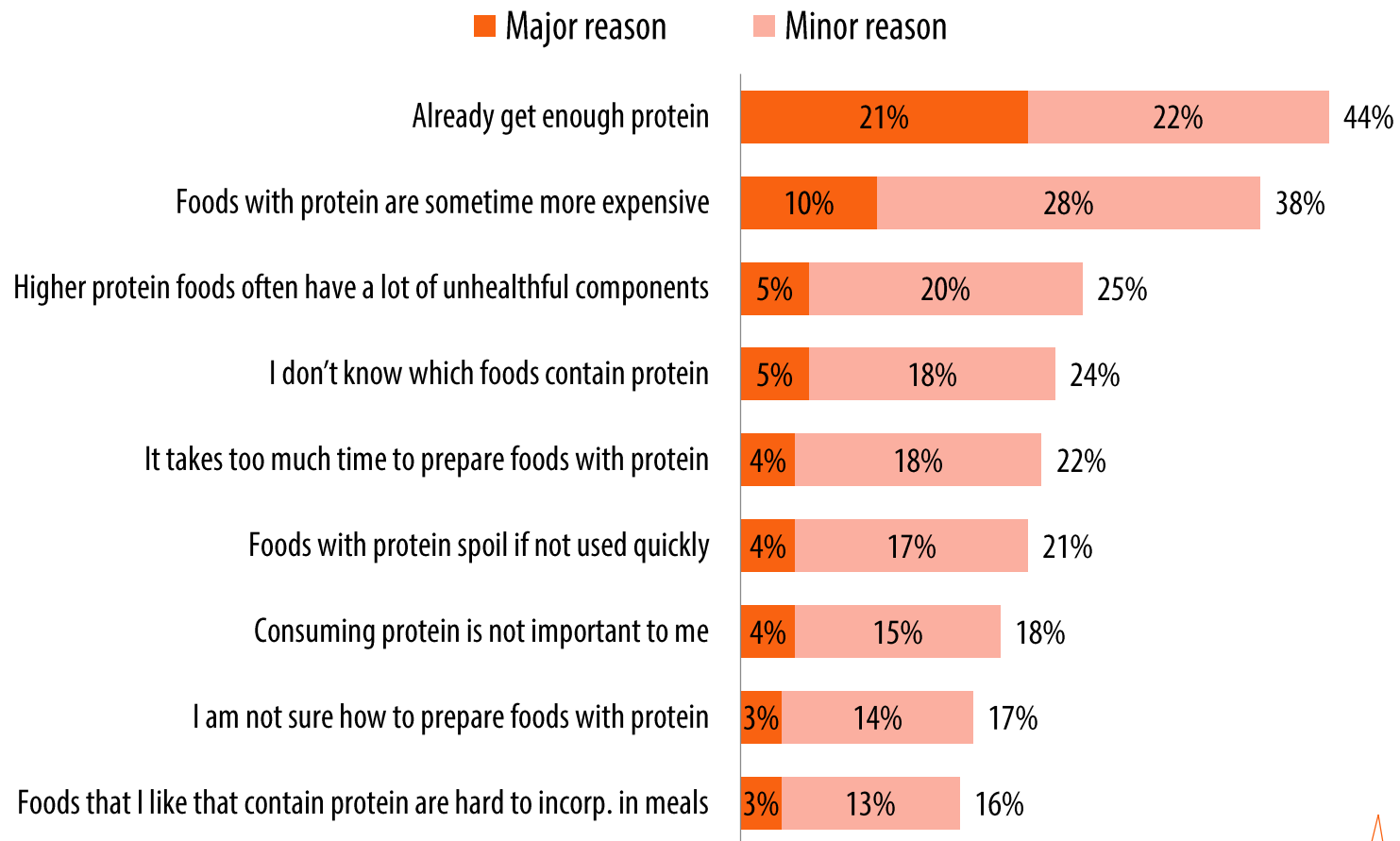
Thinking now about more specific food products, which of the following do you consume specifically in order to get protein? *(Select all that apply.)*



Tries to consume at least a certain amount of protein: 2014 n=531

The most common reasons for not consuming more protein include already getting enough protein, and foods with protein are more expensive.

To what extent, if at all, are each of the following reasons why you do not consume more protein than you do now?



THE PULSE OF AMERICA'S DIET



Dietary Components: FATS

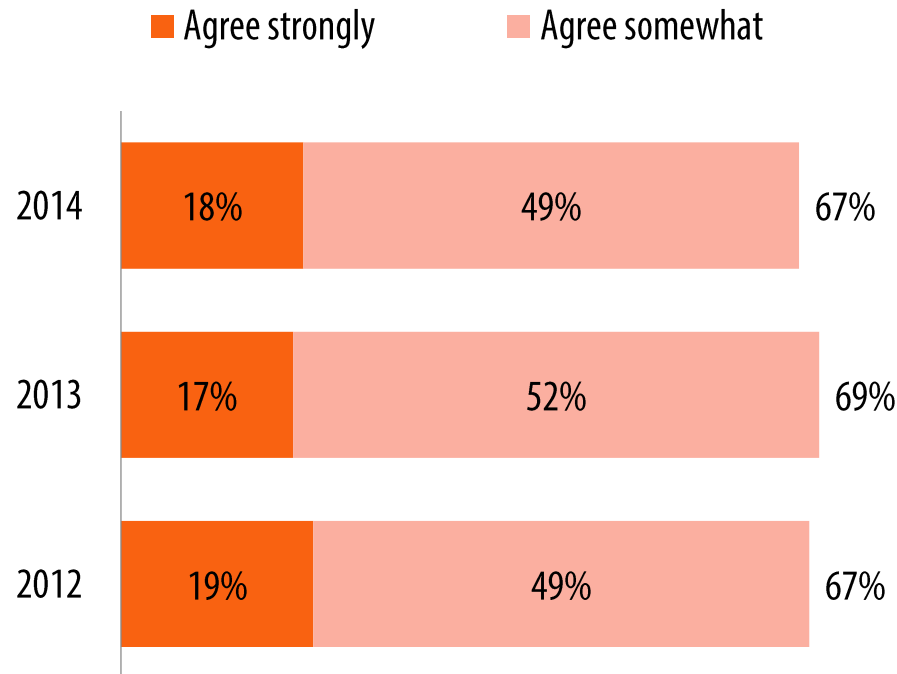


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Consistent with previous years, two-thirds of Americans say they try to eat as little fat as possible.

To what extent do you agree or disagree with the following statement?

I try to eat as little fat as possible.

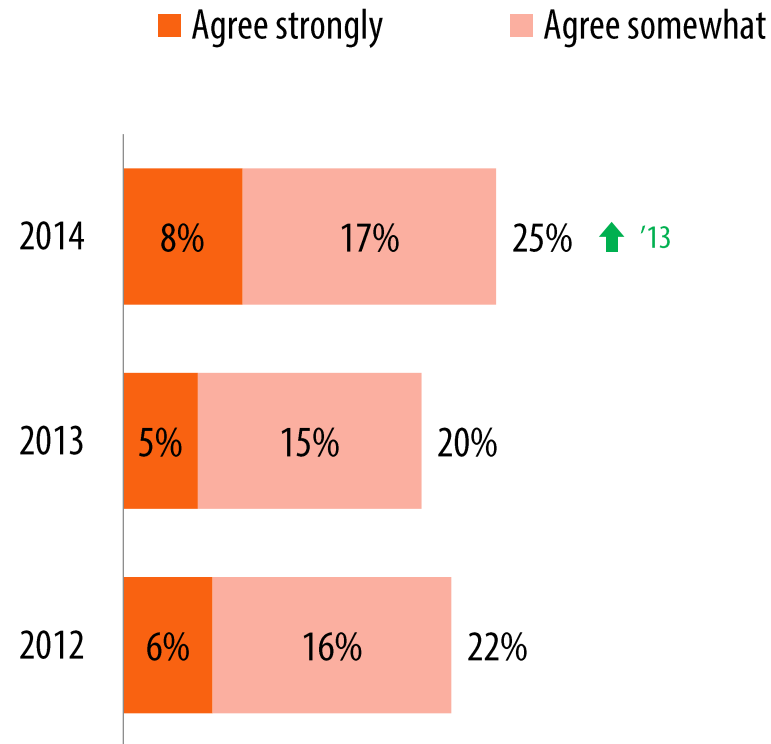


2014 n=1,005; 2013 n=1,006; 2012 n=1,057

Only a quarter of Americans agree that all fats have the same impact on health.

To what extent do you agree or disagree with the following statement?

All types of fat have the same impact on health.

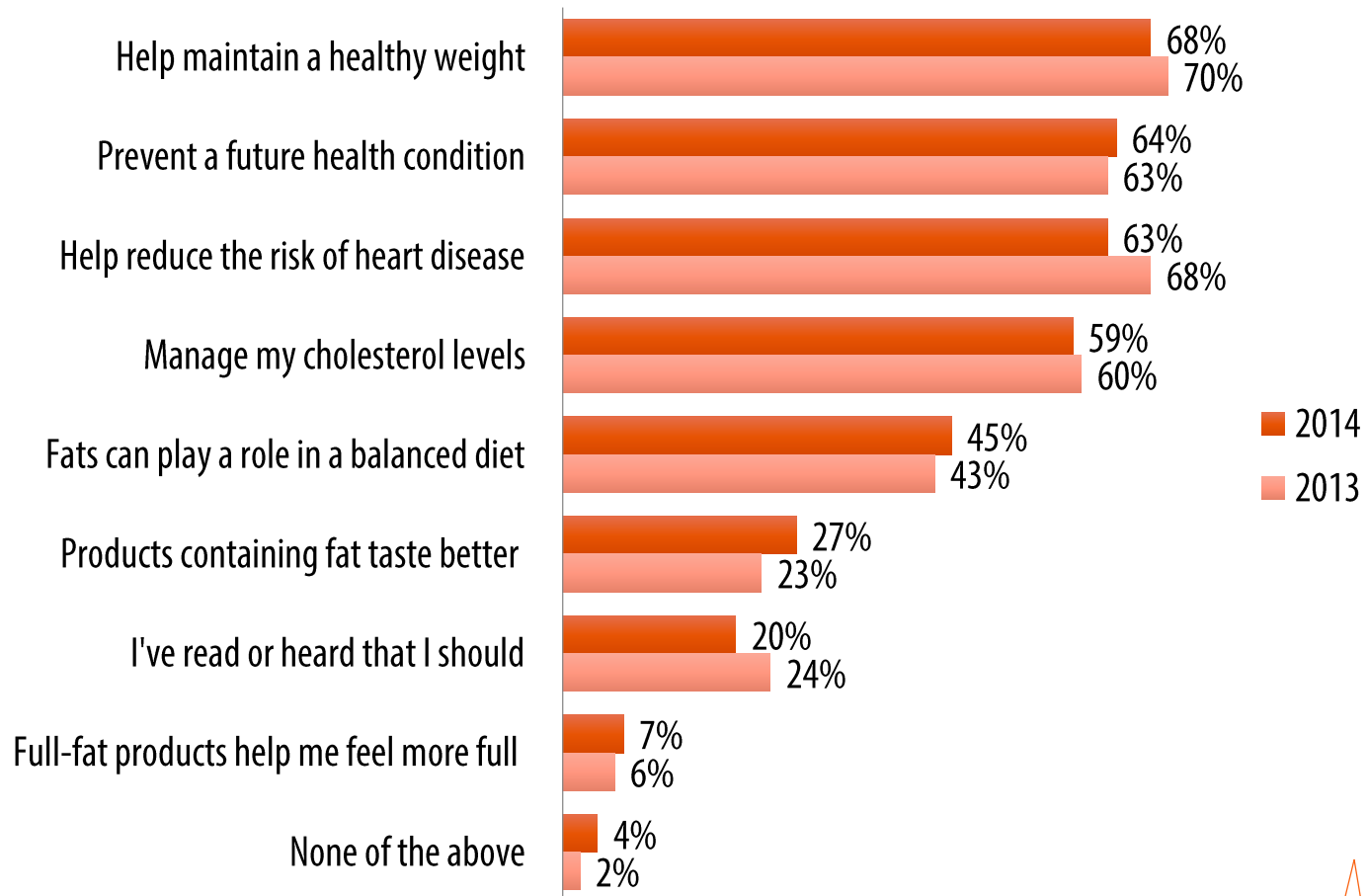


2014 n=1,005; 2013 n=1,006; 2012 n=1,057

Arrows indicate significant (.95 level) differences vs. prior year(s); comparison year is labeled.

Three out of five Americans are considering the fat content of foods to help maintain a healthy weight, prevent future health problems, and help reduce the risk of heart disease.

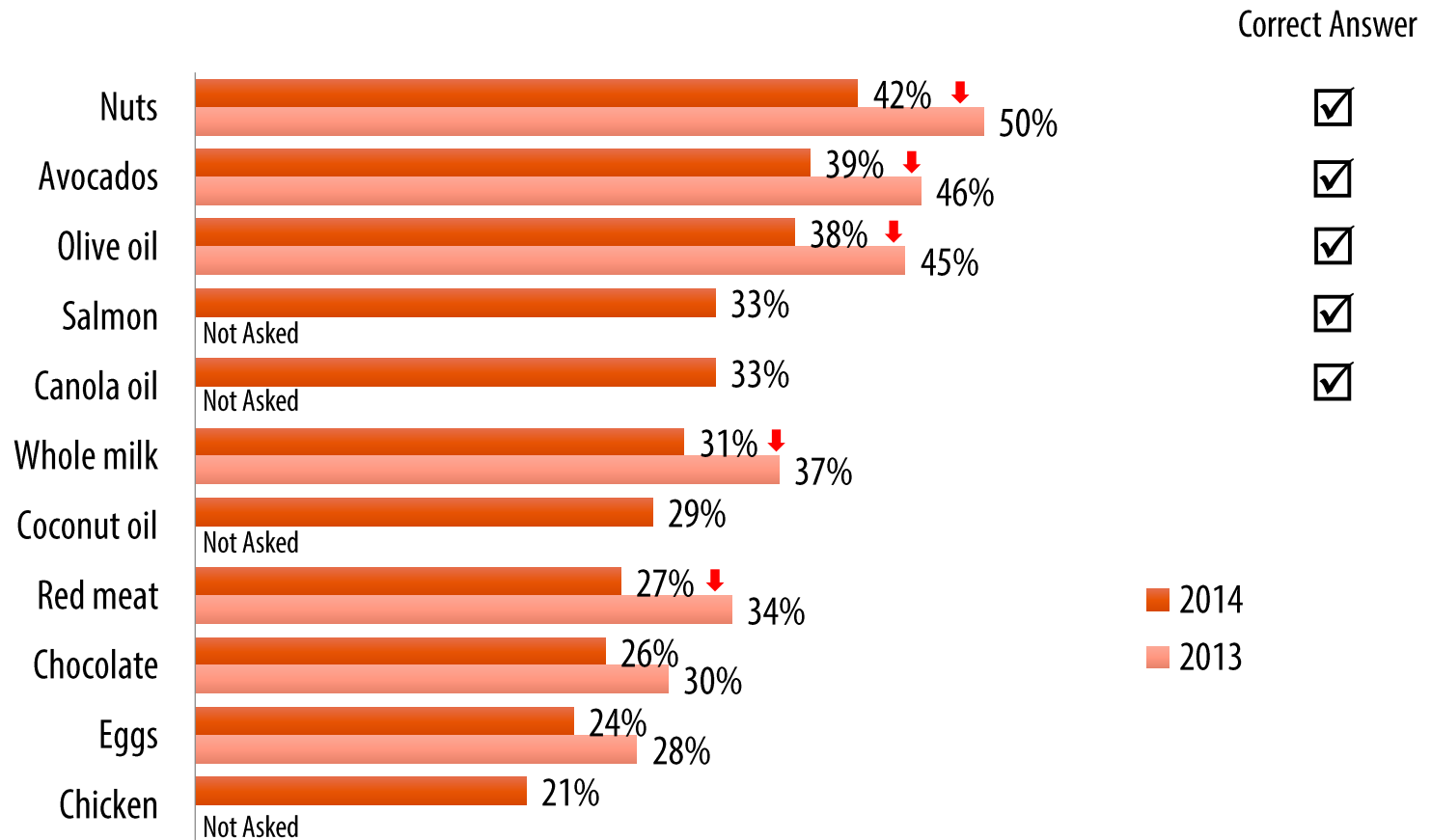
Which of the following, if any, are reasons why you consider the fat content of the foods and beverages you buy? *(Select all that apply.)*



Considers the presence/absence of fats: 2014 n=690; 2013 n=747

Two out of five Americans correctly believe that nuts, avocados, and olive oil contain high levels of unsaturated fats.

As far as you know, which of the following contain high levels of unsaturated fats?
(% Yes)



2014 n=1,005; 2013 n=1,006

Arrows indicate significant (.95 level) differences vs. 2013.

THE PULSE OF AMERICA'S DIET

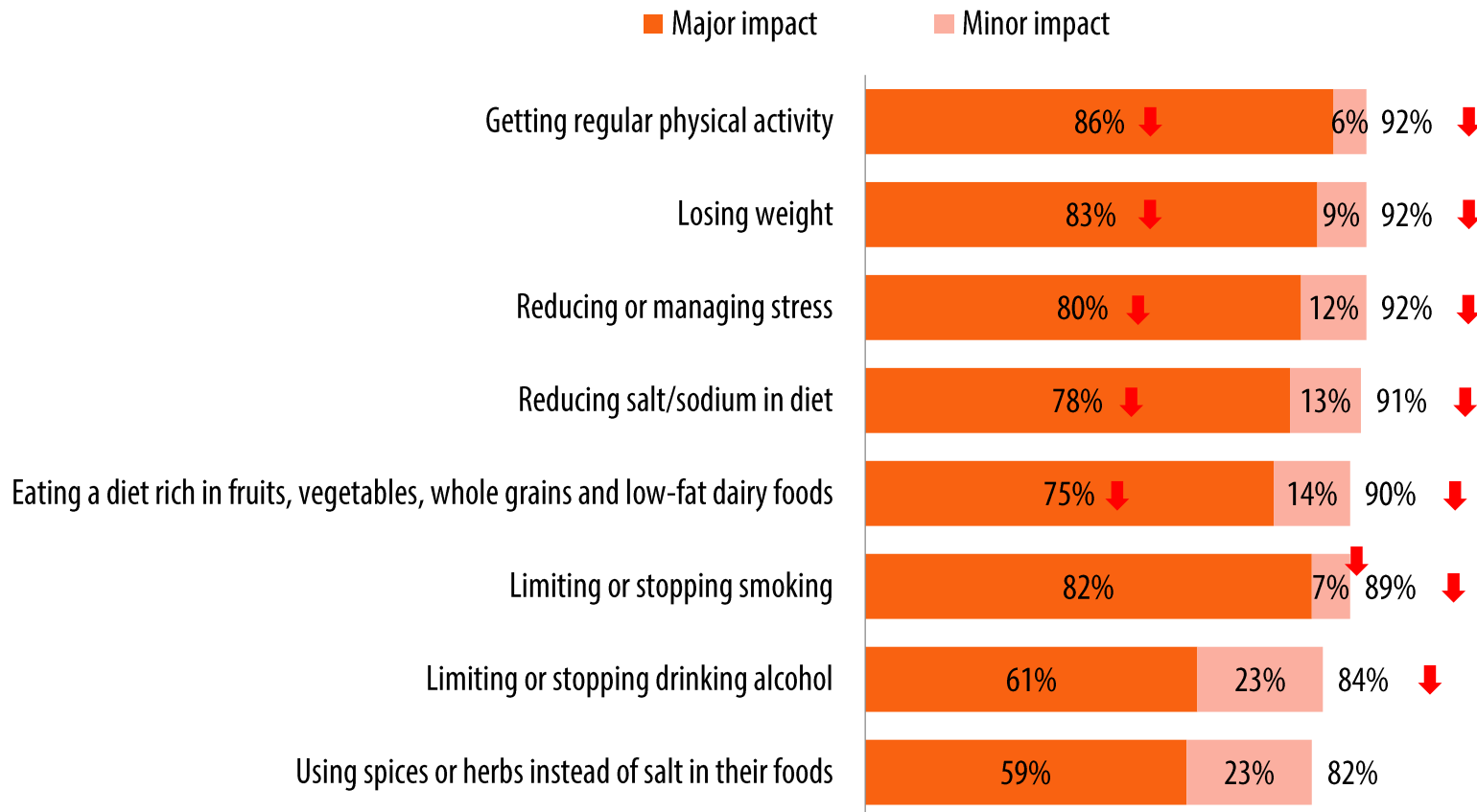
Dietary Components:
SALT/SODIUM



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The majority of Americans believe that all of the listed diet and lifestyle changes have a positive impact on blood pressure management.

If someone were trying to reduce their blood pressure or keep it from going higher, how much impact do you believe the following would have?

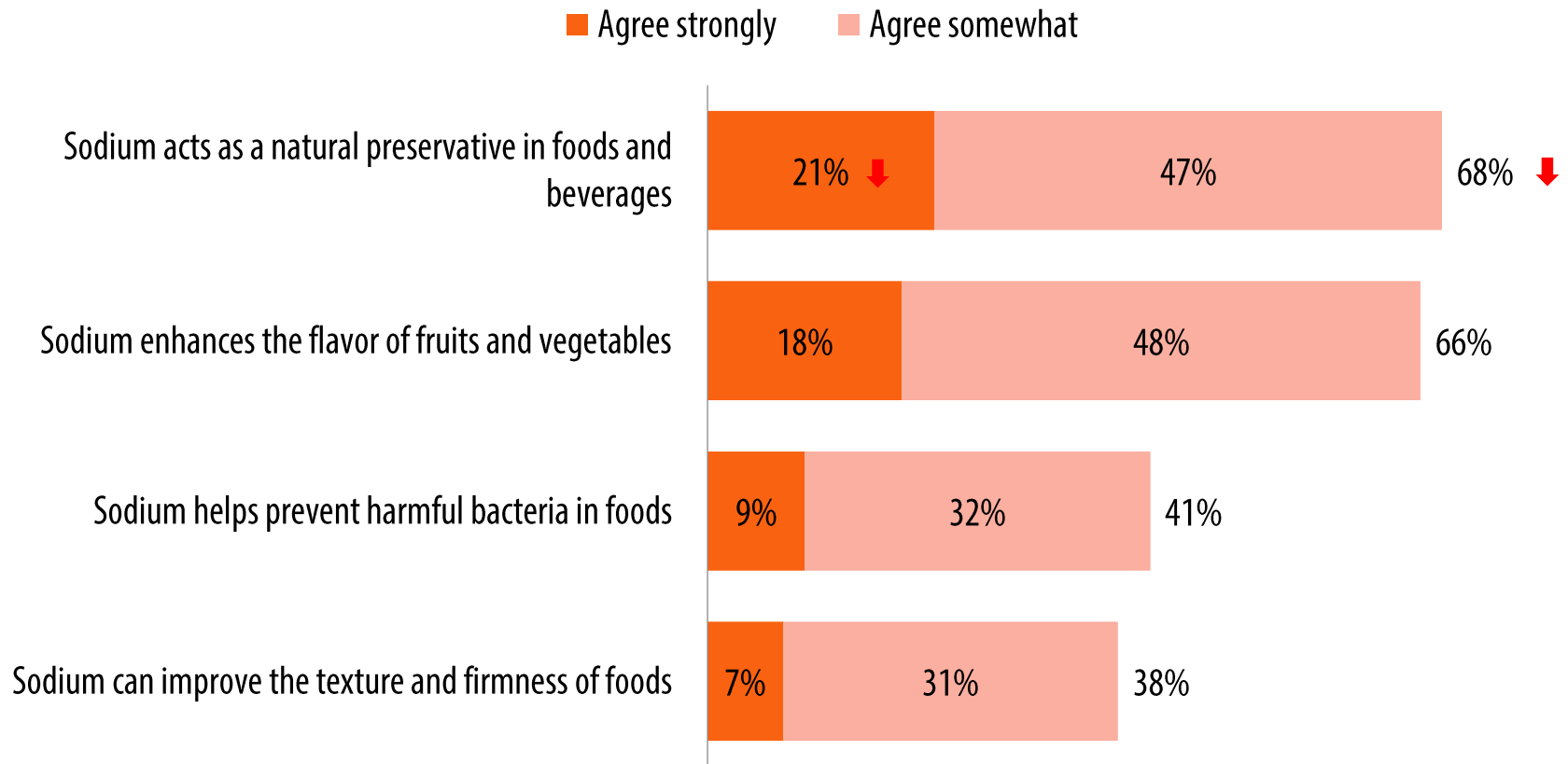


2014 n=1,005

Arrows indicate significant (.95 level) differences vs. 2013.

Two out of three Americans agree at least somewhat that sodium acts as a preservative and enhances the flavor of fruits and vegetables.

To what extent do you agree or disagree with the following statements?



2014 n=1,005

Arrows indicate significant (.95 level) differences vs. 2013.

THE PULSE OF AMERICA'S DIET



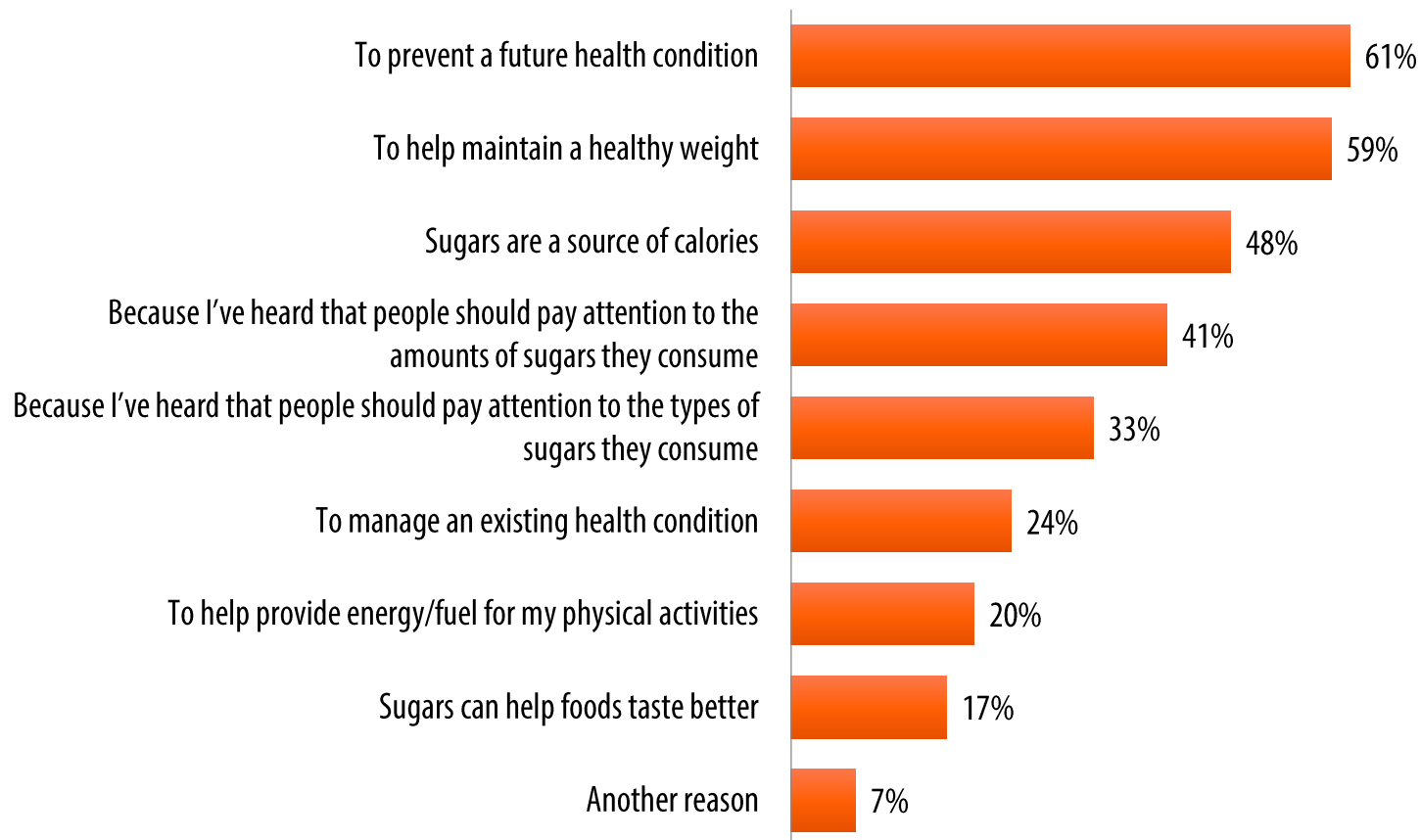
Dietary Components: SUGARS



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Three out of five Americans consider sugars content in their foods and beverages to prevent health conditions and maintain a healthy weight. The least mentioned reason for considering sugars content is to help foods taste better.

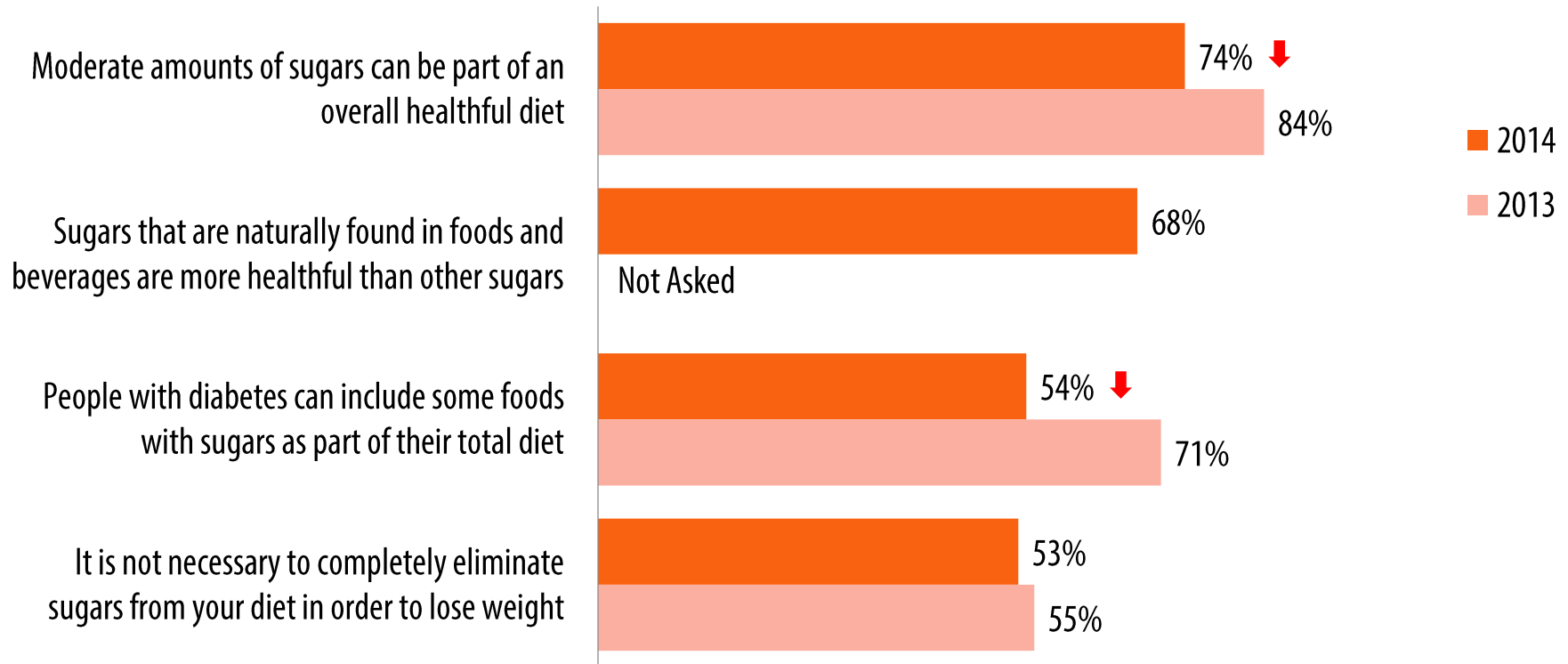
Which of the following, if any, are reasons why you consider the sugars content of the foods and beverages you buy? *(Select all that apply.)*



Considers the presence/absence of sugars: 2014 n=739

Three-quarters of Americans believe that moderate amounts of sugars can be part of a healthful diet. Two out of three think that sugars found naturally in foods and drinks are more healthful than other sugars.

As far as you know, which of the following statements, if any, are true?
(% True)

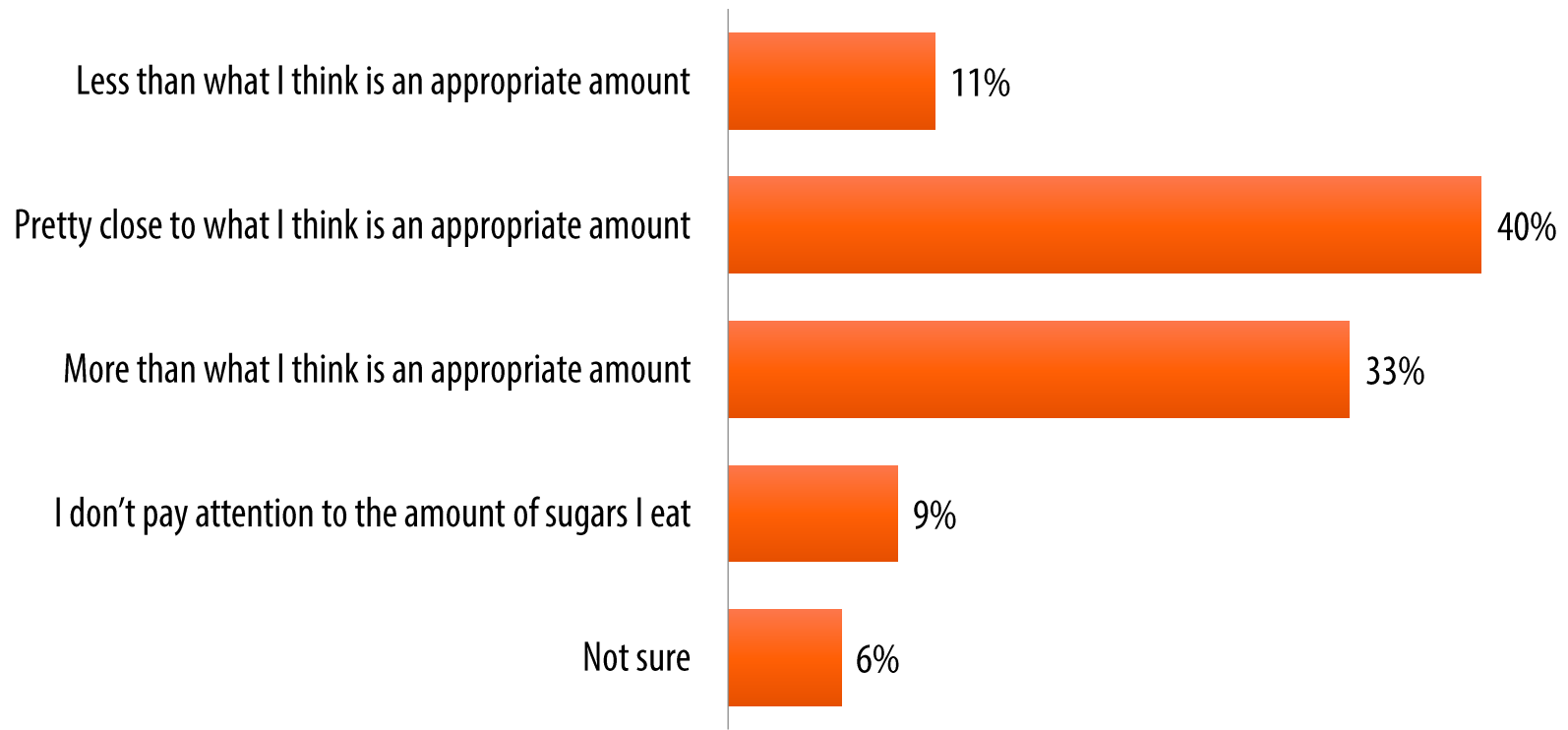


2014 n=1,005; 2013 n=1,006

Arrows indicate significant (.95 level) differences vs. 2013.

Half of all Americans are consuming no more than the appropriate amount of sugars. One in three says they consume more than the appropriate amount of sugars.

Thinking of your own diet overall, how would you describe the amount of total sugars you consume?



THE PULSE OF AMERICA'S DIET

Dietary Components:
FUNCTIONAL FOODS

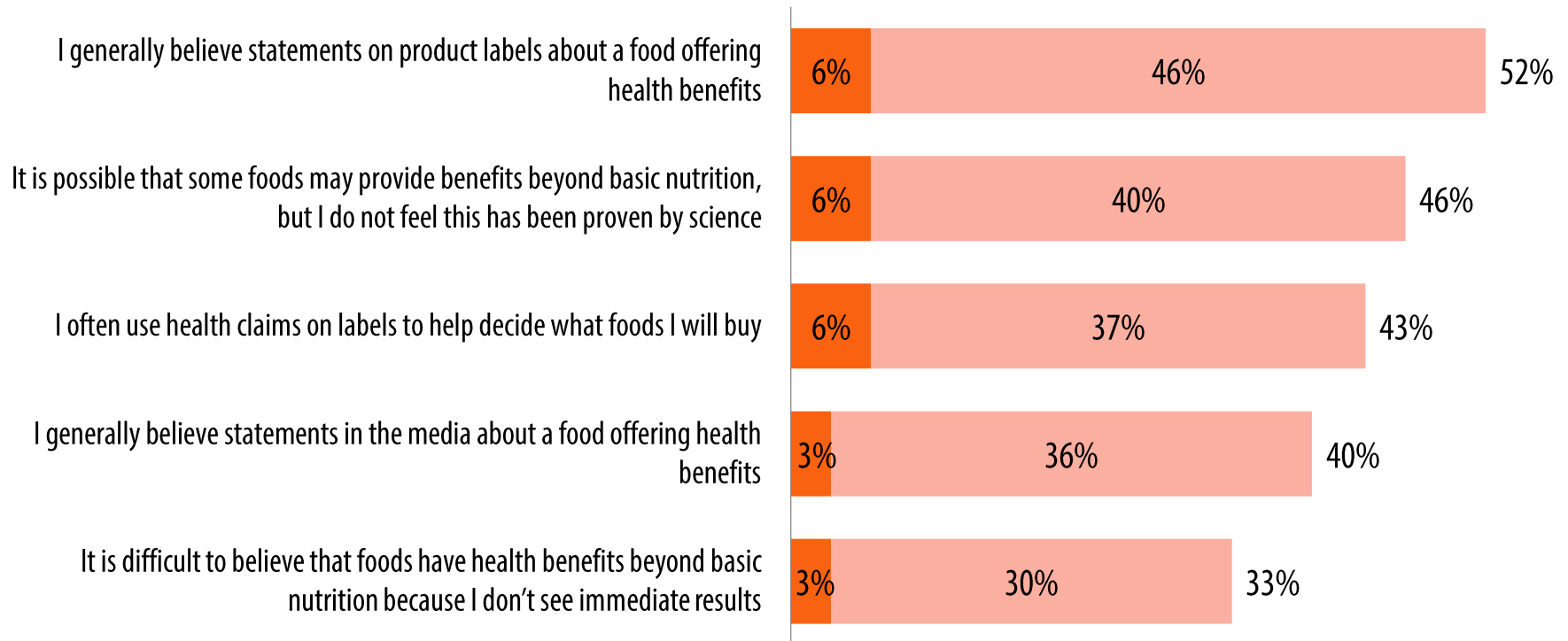


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Only half of Americans generally believe statements on product labels about health benefits.

To what extent do you agree or disagree with the following statements?

■ Agree strongly ■ Agree somewhat



Forty percent of consumers trust media statements about health benefits in food. Who are they?

WHO ARE THEY?

- Those who believe media statements about foods offering health benefits are more likely to be married (64% vs. 53%) and have higher BMIs, but otherwise are not unlike their counterparts in terms of demographics.

WHAT DO THEY BELIEVE?

- In addition to believing media claims about health benefits in food, this group is more than twice as likely to believe statements on product labels about a food offering health benefits (81% vs. 37%).
- However, they are also more likely to report skepticism in regards to whether science has proven that foods offer health benefits beyond basic nutrition. Additionally, the lack of immediate results from these benefits adds uncertainty for this group.
- They are more likely to believe that all types of fats have the same impact on health and that food processing can help foods stay fresh longer.
- That said, they also report putting less thought into the ingredients of their foods and beverages and how these items are farmed and produced.

WHO DO THEY TRUST?

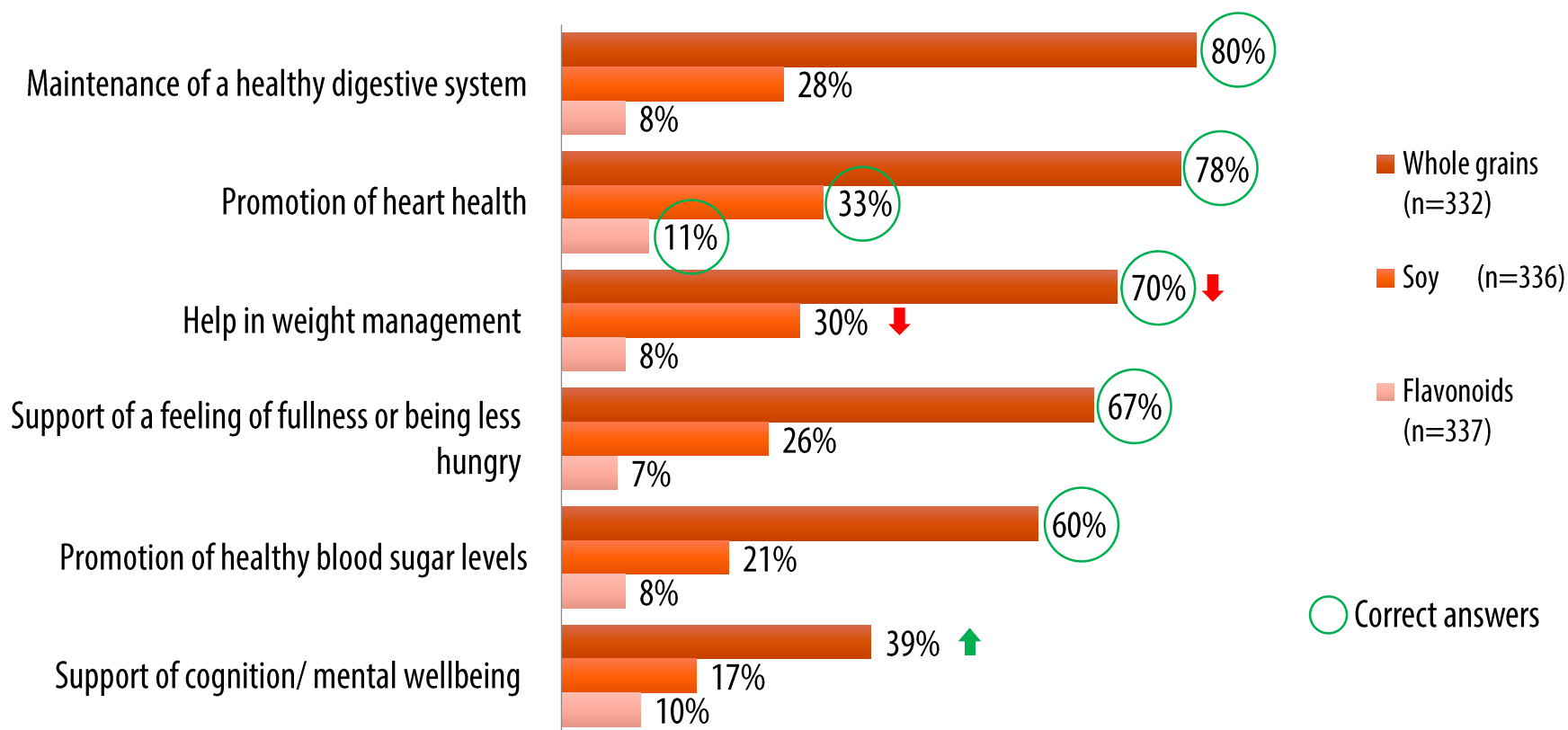
- Although this group generally trusts media claims, the news media is not their most trusted source for issues such as nutrition, physical activity, weight loss, food safety, ingredients, or how foods are farmed and produced. In fact, the news media ranks near the bottom for all of these except regarding how foods are farmed and produced – 19% of this subgroup turn to the media first on this topic.
- This group is more likely than their counterparts to trust government agencies the most on the issue of food safety and more likely to trust government agencies and food manufacturers when it comes to food ingredients.
- Similarly, these consumers are more likely to view food companies as taking appropriate measures to ensure safety (74% vs. 54%) and to think that the FDA is effective at ensuring the safety of food (82% vs. 61%).

HOW DOES THIS IMPACT THEIR BEHAVIOR?

- Those who believe claims about health benefits in foods (both from the media and on product labels) unsurprisingly use this information when shopping. Roughly two-thirds of this subset of consumers use health claims on labels to help make purchasing decisions. This is twice the proportion found amongst those who are skeptical of media claims about health benefits.
- Interestingly, they are no more likely to change the foods that they eat because of food safety information they read or heard. Likewise, although food recalls impact the purchasing decisions for 71% of these consumers, this proportion is no different than that of their counterparts.
- These consumers are more likely to use coupons or discounts when shopping.

Americans recognize health benefits associated with whole grains. Very few are aware of health benefits associated with soy and flavonoids.

To the best of your knowledge, are [whole grains/soy/flavonoids] associated with...
(% Yes)



Question is split-sampled – respondents get only one version of the question.

Arrows indicate significant (.95 level) differences vs. 2013.

THE PULSE OF AMERICA'S DIET

Dietary Components:
CAFFEINE

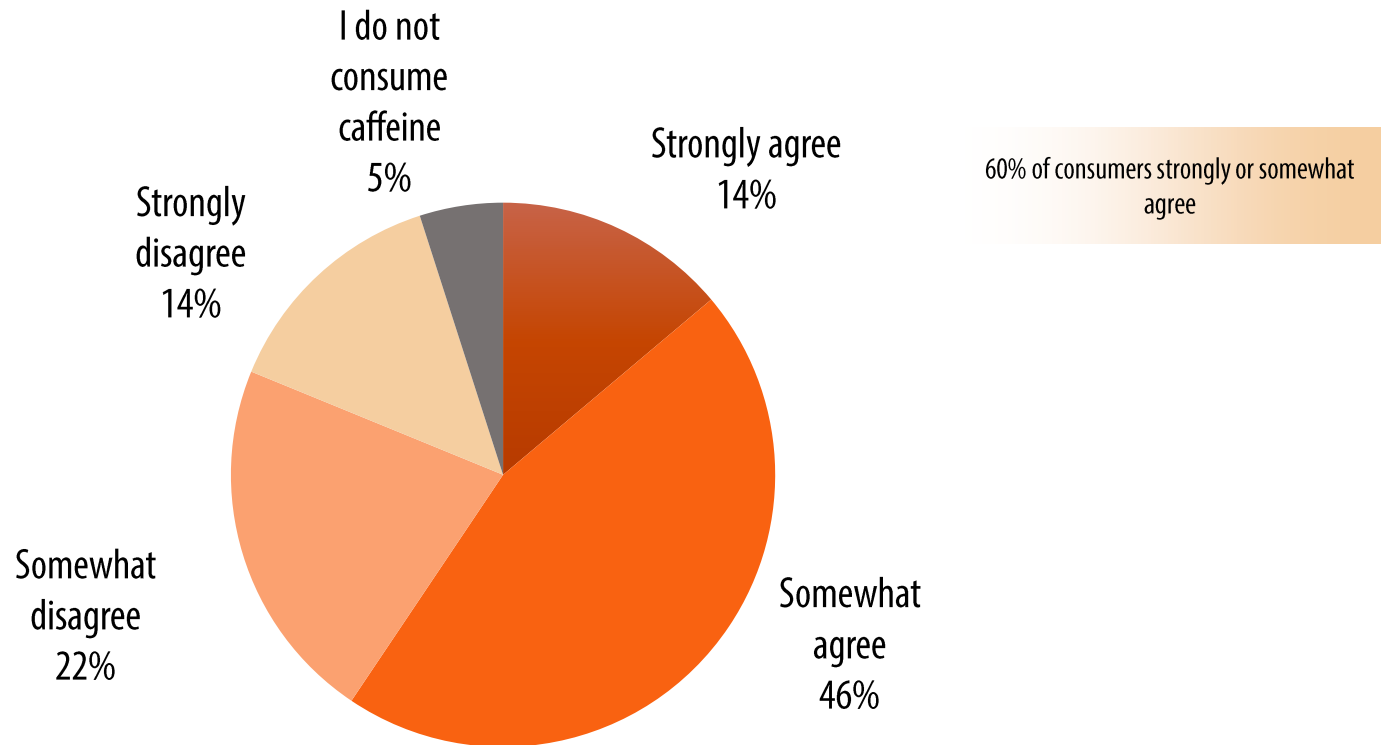


INTERNATIONAL
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Three out of five report that they know the amount of caffeine in the foods and drinks they consume.

Please indicate how much you agree or disagree with the following statement:

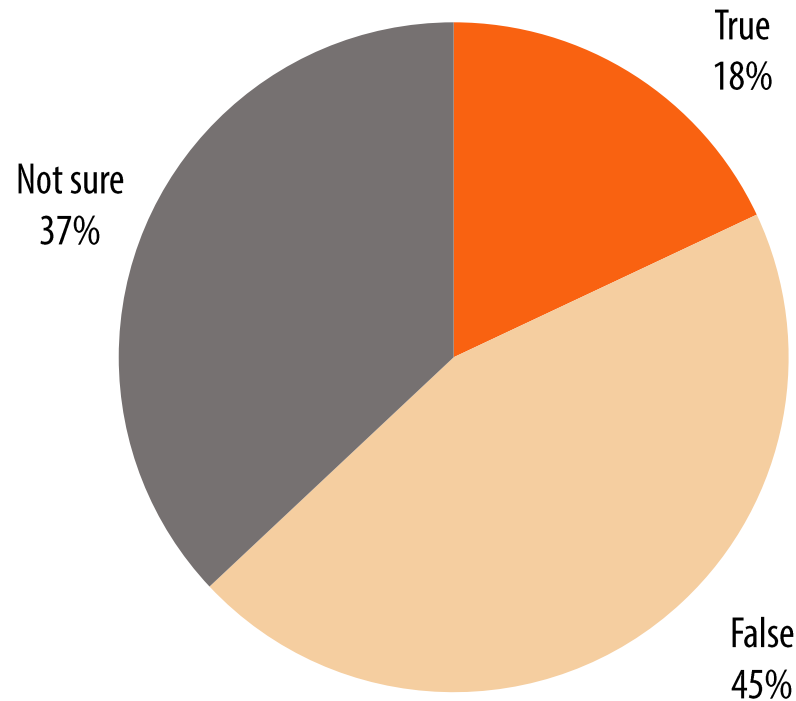
I know the amount of caffeine that is in the foods and beverages I consume.



Less than one in five Americans think that an 8-ounce cup of coffee has the same amount of caffeine as an energy drink.

As far as you know is the following statement true or false:

An 8-ounce cup of (home-brewed) coffee has roughly the same amount of caffeine, on average, as an energy drink of the same size.



THE PULSE OF AMERICA'S DIET



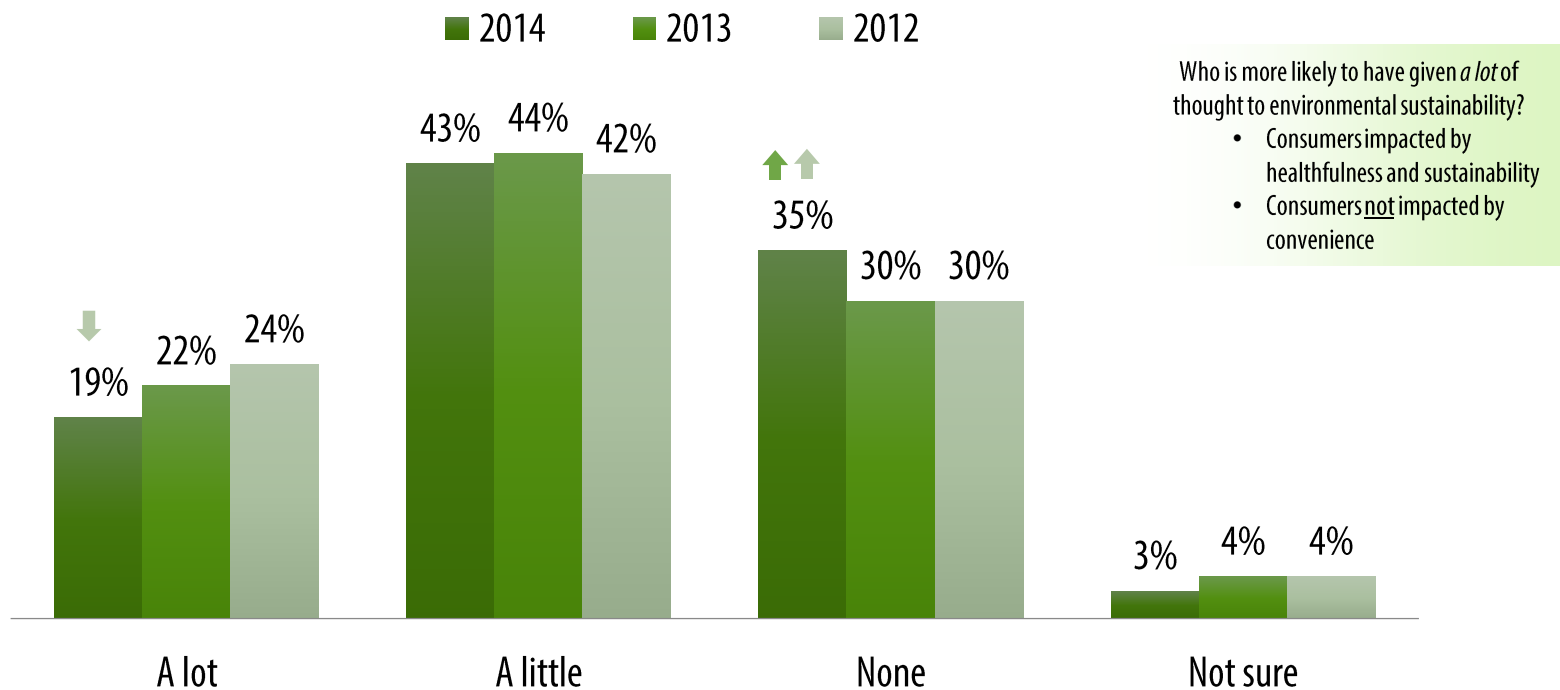
Sustainability



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Six in ten Americans say they have given thought to the environmental sustainability of their foods and beverages.

Over the past year, how much thought have you given to whether your foods and beverages are produced in an environmentally sustainable way?



2014 n=1,005; 2013 n=1,006; 2012 n=1,057

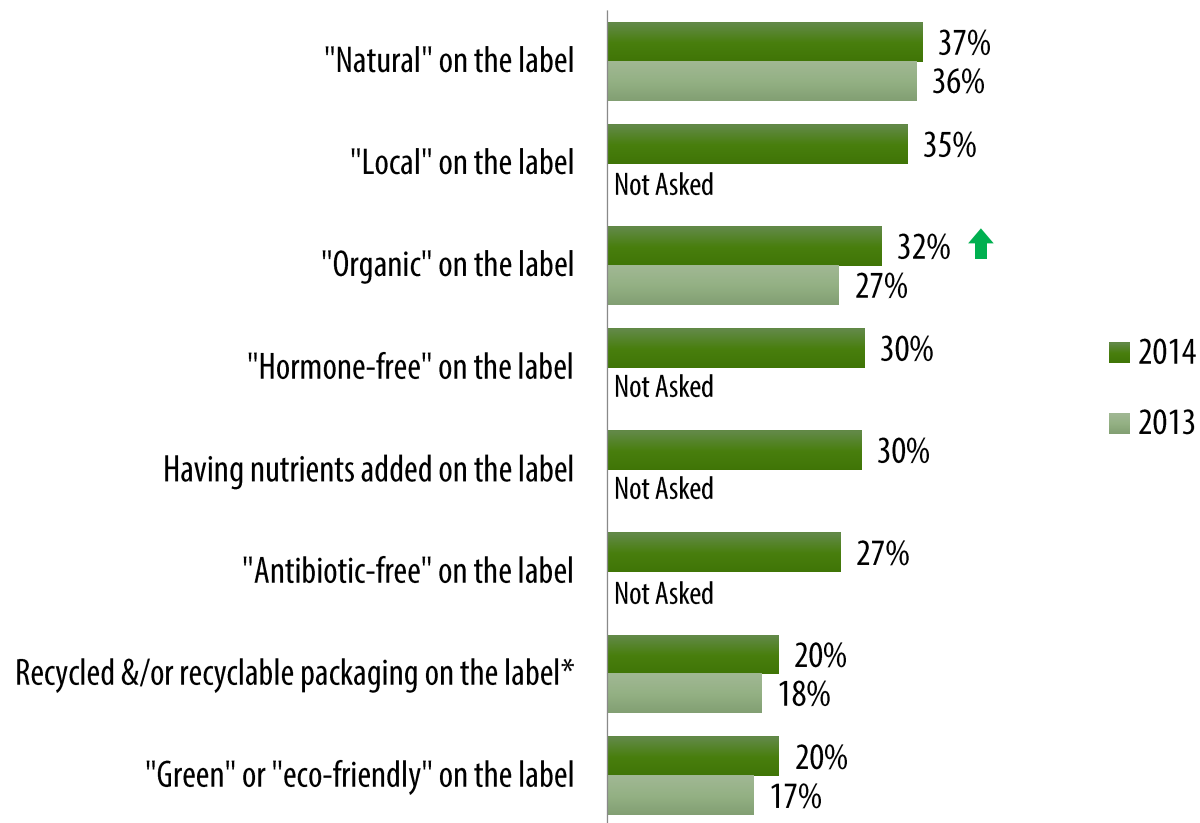
In 2014, "sustainable" was changed to "environmentally sustainable."

Arrows indicate significant (.95 level) differences vs. prior year(s); color of arrow indicates comparison year.

In 2014 more than a third of respondents buy foods on a regular basis because they are labeled as "Natural" or "Local."

Which of the following, if any, do you do on a regular basis
(that is, most times when you shop for food and beverages)?

Buy foods because they are advertised as . . .



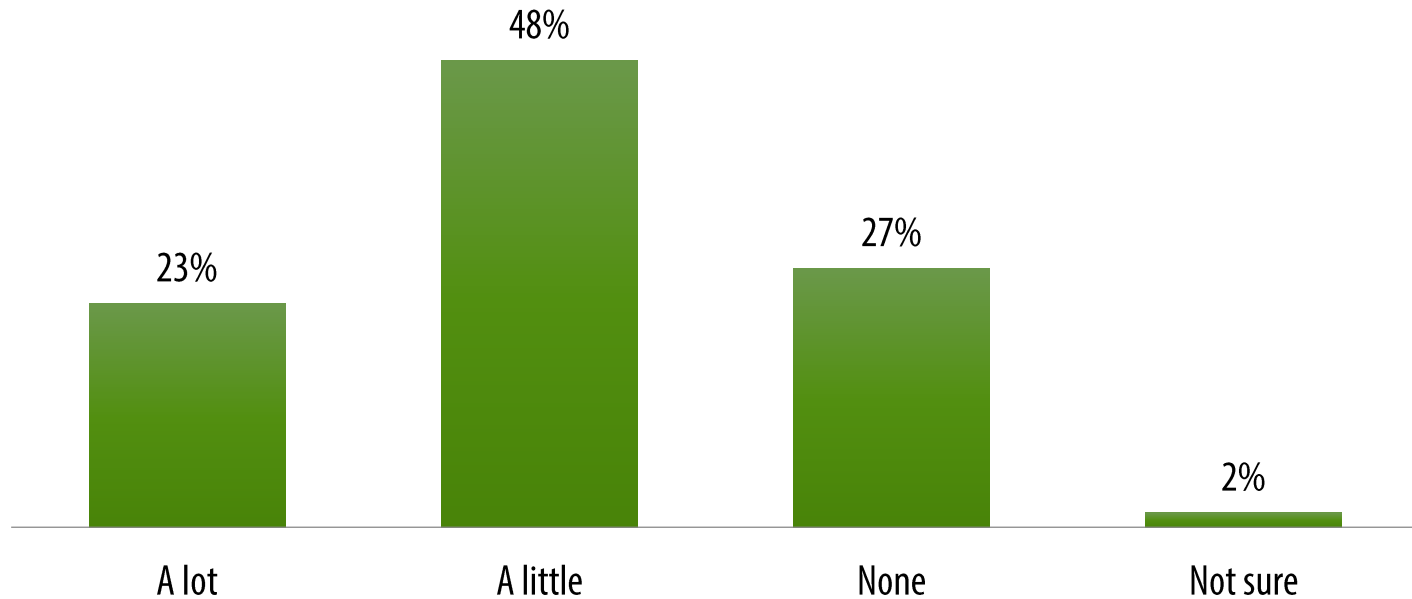
2014 n=1,005; 2013 n=1,006

*In 2014, "on the label" was added to this item.

Arrows indicate significant (.95 level) differences vs. 2013.

Seven out of ten Americans have given some (*a lot* or *a little*) thought to the production of their foods and beverages. More than a quarter are not giving any thought to the way the foods and beverages they consume are farmed or produced.

Over the past year, how much thought have you given to the ways the foods and beverages you consume are farmed or produced?



THE PULSE OF AMERICA'S DIET



Food Safety



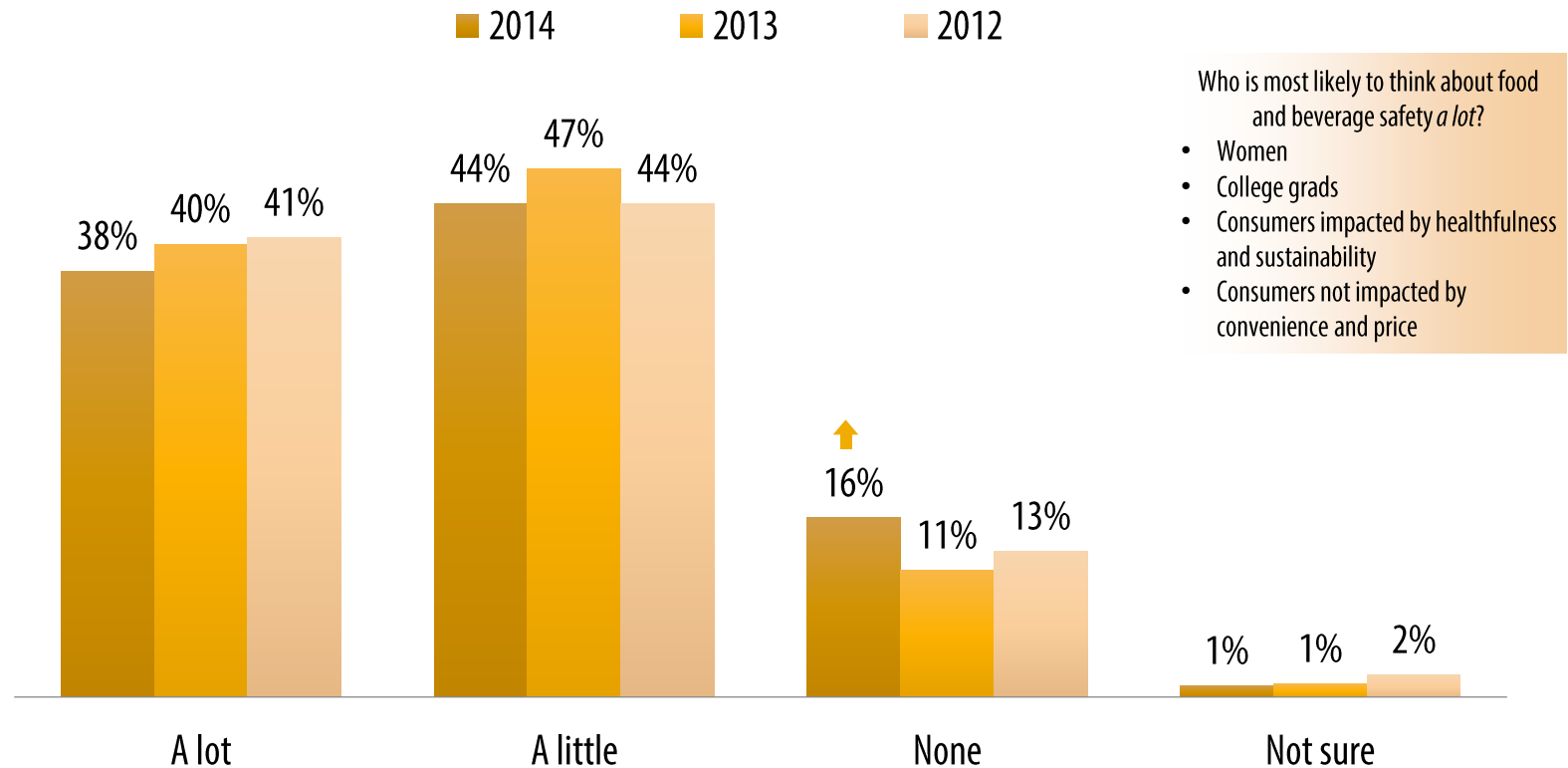
INTERNATIONAL

FOOD INFORMATION

COUNCIL FOUNDATION

Almost two out of five Americans report that they have given food and beverage safety *a lot* of thought.

Over the past year, how much thought have you given to the safety of your foods and beverages?

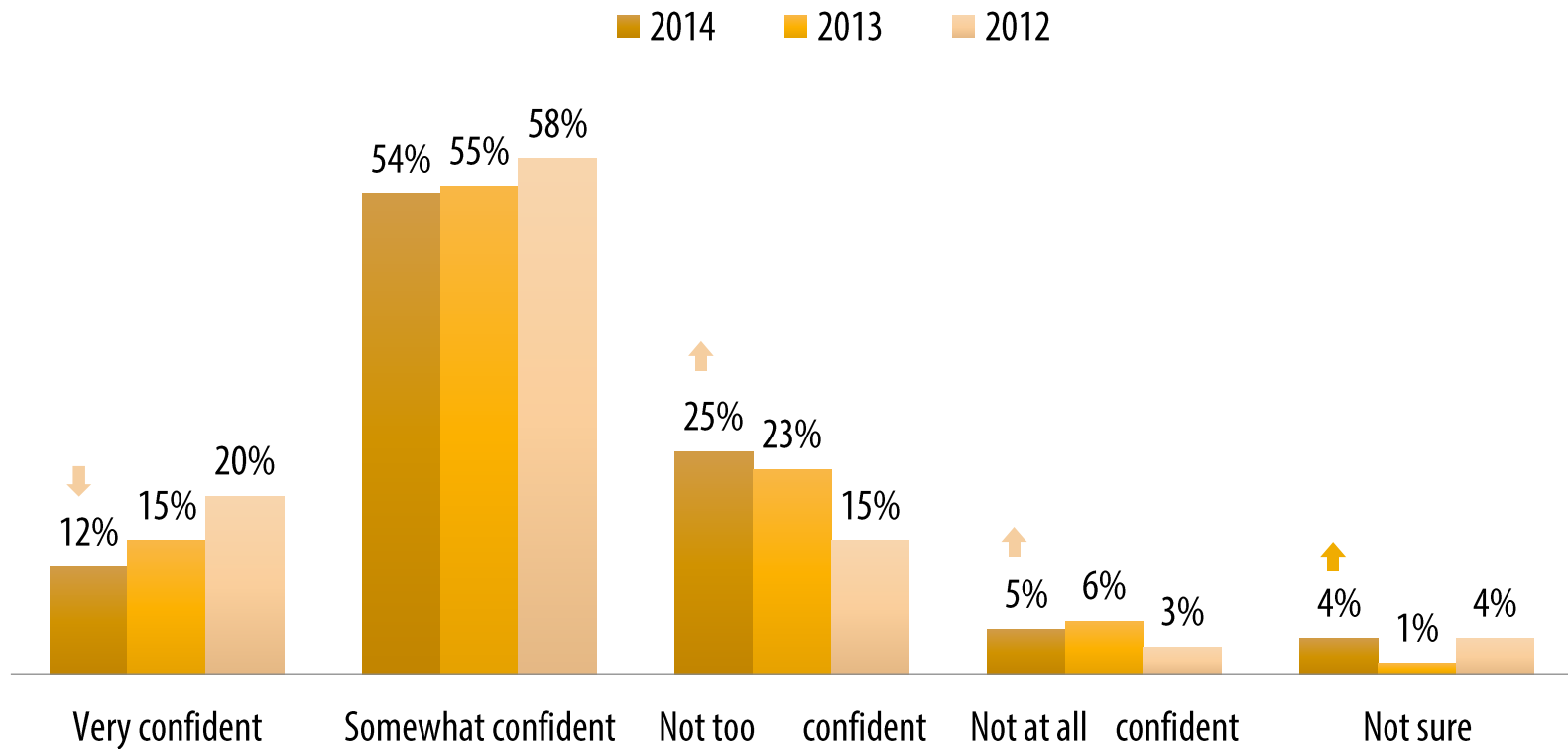


2014 n=1,005; 2013 n=1,006; 2012 n=1,057

Arrows indicate significant (.95 level) differences vs. prior year(s); color of arrow indicates comparison year.

Even though two-thirds of Americans report being confident with the U.S. food supply, the lack of confidence continues to increase, with three out of ten reporting that they are not confident (*not too or not at all confident*).

Overall, how confident are you in the safety of the U.S. food supply?



2014 n=1,005; 2013 n=1,006; 2012 n=1,057

Arrows indicate significant (.95 level) differences vs. prior year(s); color of arrow indicates comparison year.

Nearly a third of consumers are concerned about the U.S. food supply. Who are they?

WHO ARE THEY?

- Those who lack confidence in the food supply are less likely to be white (59% vs. 68%), slightly younger, and more likely to have kids in the household (33% vs. 24%).

WHAT CONCERNS THEM?

- These people are much less likely to think that the brands they buy are safe (65% vs. 92%). They are also more bothered by conflicting information regarding food safety and uncertainty about food production.
- They have given more thought to several food and beverage issues: ingredients, food safety, the environmental-sustainability of food production, and how foods and beverages are farmed and produced in general.

WHO DO THEY TRUST?

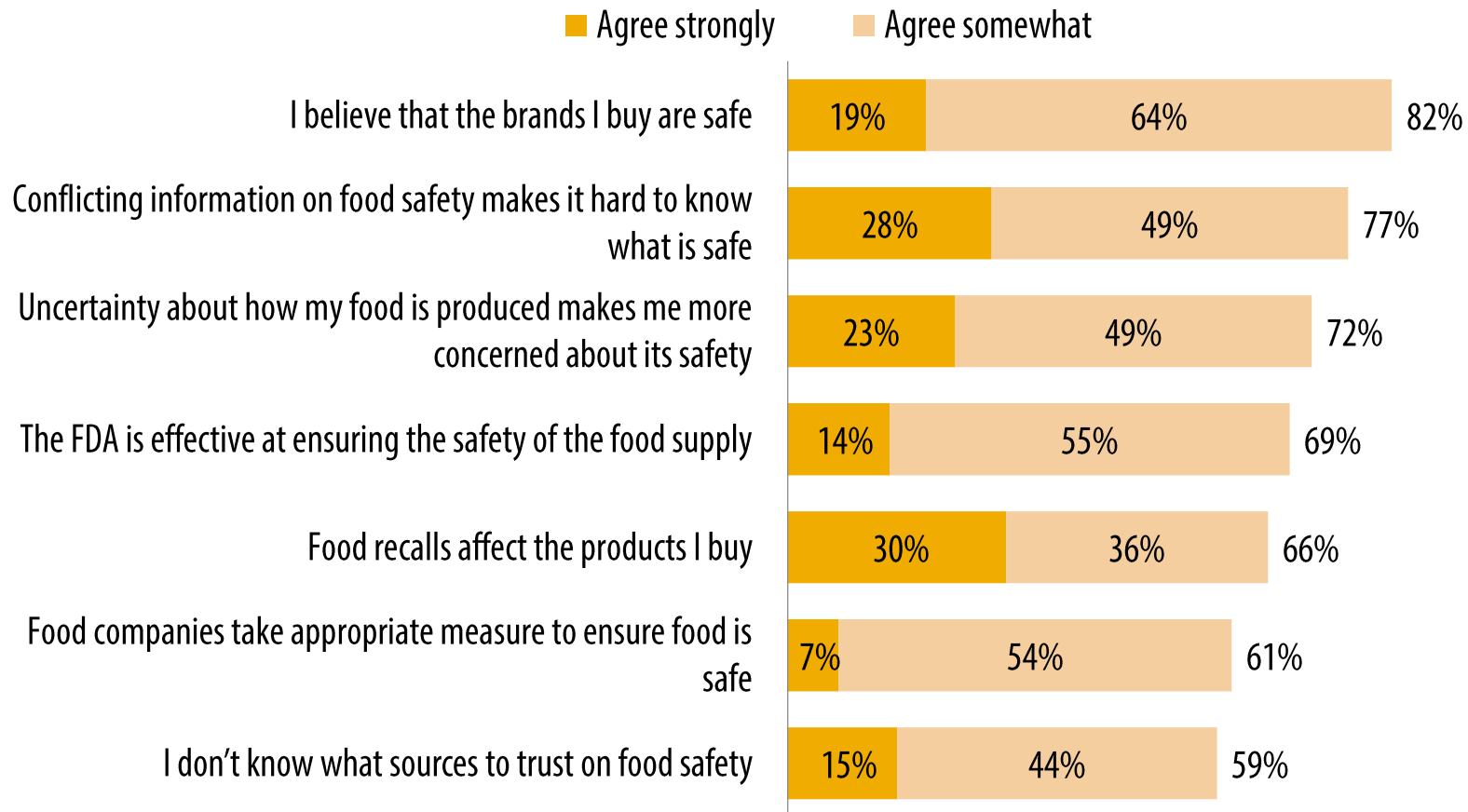
- Those concerned about the food supply are less likely to trust government agencies regarding food safety, nutrition, ingredients, and the way foods are produced. They are also less trusting of food manufacturers regarding ingredients, and less trusting of medical professionals regarding nutrition. On almost all issues, they show a stronger degree of trust in health-focused websites and scientific journals than their counterparts.
- Only 32% (vs. 76% of those confident) view food companies as taking appropriate measures to ensure safety; only 38% (vs. 84%) think the FDA is effective at ensuring safety.
- They generally are less believing of health benefit claims on labels and in the media.
- 78% don't know who to trust regarding food safety.

HOW DOES THIS IMPACT THEIR BEHAVIOR?

- Those who lack confidence in the food supply are much more likely to have changed the foods they eat because of food safety information they heard or read (54% vs. 32%). Interestingly, however, they are no more impacted by food recalls than other consumers.
- They worry most about potential chemicals in their foods when shopping, whereas those more confident in the food supply have more general concerns ("getting sick from something I eat").
- They report using health claims on labels less often when making purchasing decisions (37% vs. 46%), but they are more likely to buy foods labeled as local, organic, hormone-free, and antibiotic-free.
- They are less likely to agree that processing can improve food safety (42% vs. 59%).
- Their food purchasing decisions are less driven by convenience, but are otherwise similar on taste, price, sustainability, and even healthfulness. Healthfulness and safety are clearly distinct issues for these consumers.

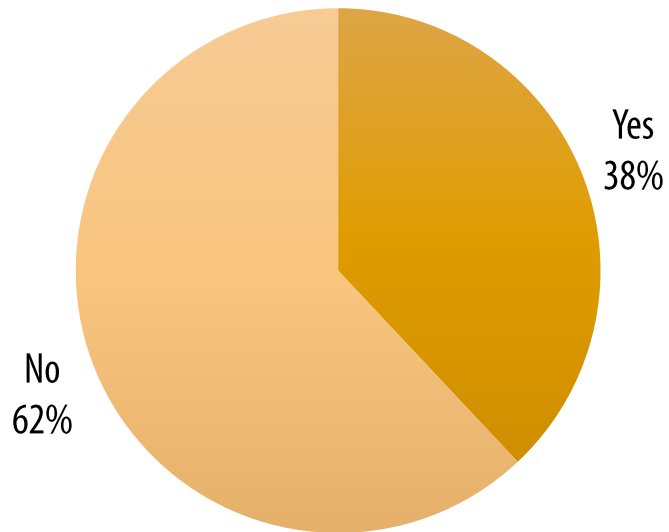
More than four out of five Americans believe that the brands they buy are safe. They are least likely to agree strongly that food companies take appropriate measures to ensure food safety.

To what extent do you agree or disagree with the following statements?

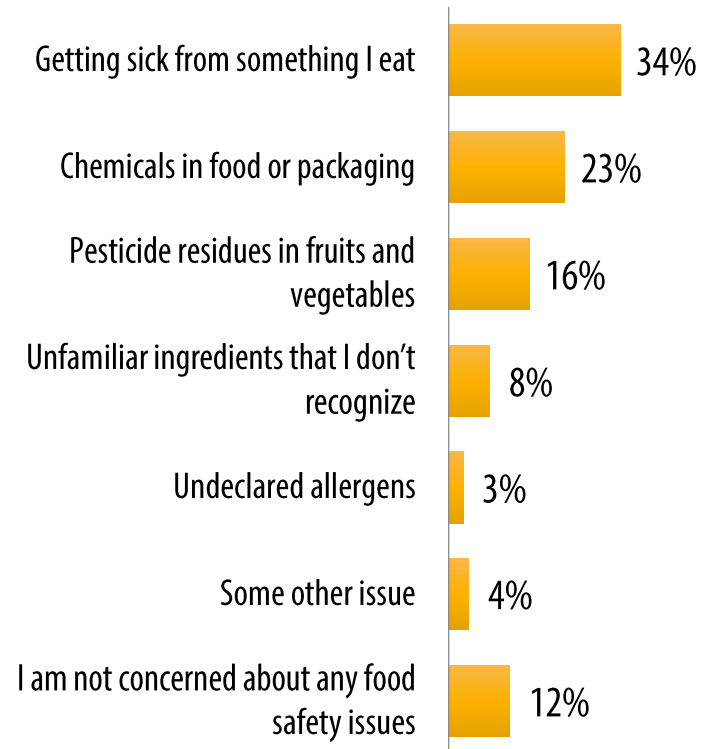


Two out of five Americans have changed the foods they eat as a result of food safety information. A third of Americans consider getting sick from something they eat as their most important food safety issue.

Have you changed any of the foods you eat in the past year as a result of information you heard or read about food safety?



What is the most important food safety issue you consider when shopping for food?



Roughly 40% of consumers changed their diet because of food safety information. Who are they?

WHO ARE THEY?

- Those who responded to safety information are less likely to be white (58% vs. 68%) and predominantly female (60%). They are also more likely to be trying to lose weight (61% vs. 50%).

WHAT CONCERNS THEM?

- Overall this segment of consumers is highly attentive to food and nutrition information. They are more likely to have given a lot of thought to the calories they consume and issues of safety, healthfulness, ingredients, and production of their foods and beverages. They are also more likely to consider all 36 food components asked on the survey. In addition, they look at more items on food and beverage packaging (5.2 items) on average than their counterparts (3.8 items).
- Similar to the subset of consumers concerned about the food supply, those who changed their diet because of food safety information are more likely to be concerned about conflicting information regarding food safety and uncertainty about food production. They also believe that imported foods are generally less safe than domestic products.

WHO DO THEY TRUST?

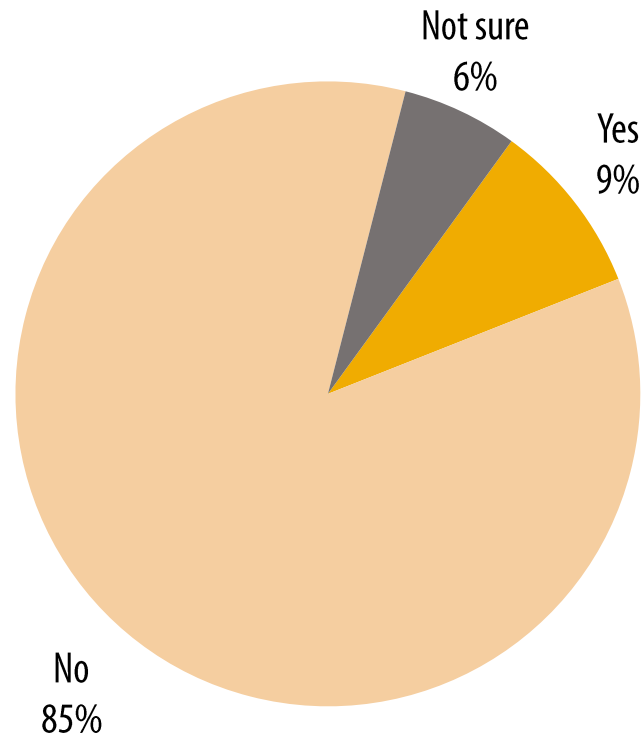
- Unsurprisingly, this group is more likely to be skeptical of the job food companies and the FDA do to ensure food safety. Only 53% (vs. 66%) view food companies as taking appropriate measures and 62% (vs. 73%) think the FDA is effective at ensuring the safety of food.
- Despite these differences, this trust level is much higher than that of the subset of consumers concerned about the food supply. And when it comes to sources of information, those who changed their diet because of food safety and those who didn't are essentially the same for topics such as food safety, ingredients, and the way food is farmed and produced. They are also equally believing of media claims regarding nutritional benefits in food. These consumers are attentive to food and food safety information, but not skeptical of the source of that information.

HOW DOES THIS IMPACT THEIR BEHAVIOR?

- As we would expect with this group, these consumers are more active in improving their health and diet on multiple fronts. They put more planning into every meal and are more likely to have made an effort on all diet-related behaviors asked (such as consuming smaller portions, eating more fruits and vegetables, and cutting back on foods higher in salt, sugars, and solid fats). They are even more likely to use mobile apps for planning.
- They are no more likely to believe health claims on product labels, but they are more likely to actually use them to help decide on a purchase. In fact, they are more likely to buy foods labeled as "natural", "local", "organic", "hormone-free", "antibiotic-free", "eco-friendly", or having added nutrients or recyclable packaging. In fact, 50% of this group purchase organic products, compared to only 20% of their counterparts.
- Lastly, their purchase behavior is also more impacted by food recalls (true for over three-quarters). They also clearly put this concern into practice as they are no different in their belief that the brands they buy are safe.

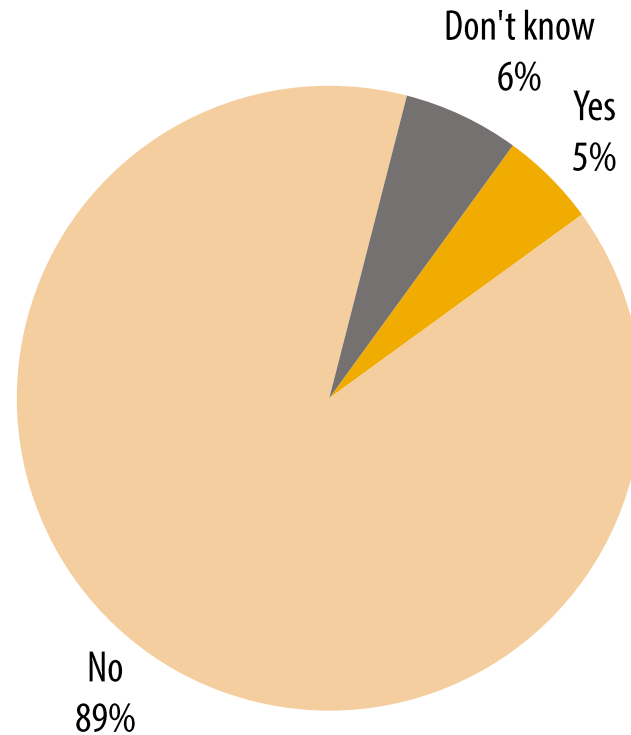
More than four out of five Americans have not heard the term GRAS.

Have you ever heard of the term GRAS (Generally Recognized as Safe)?



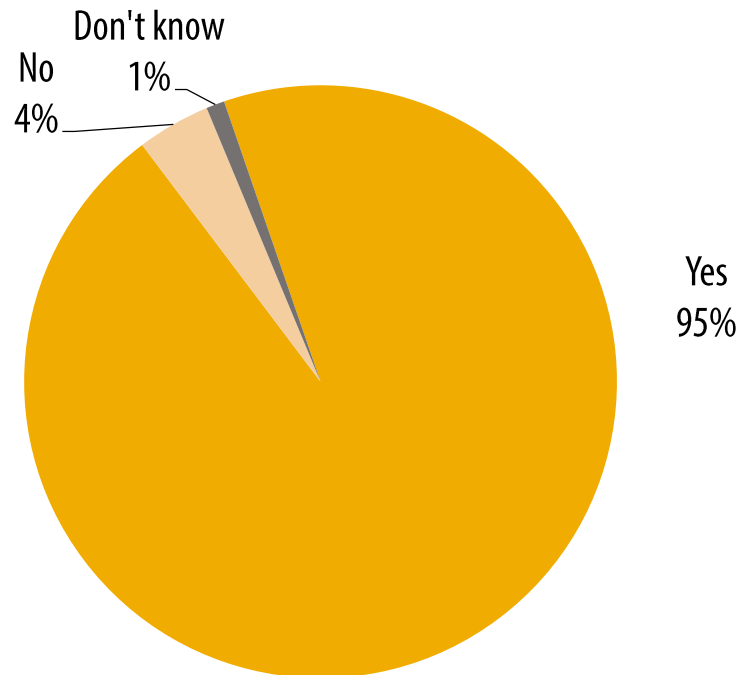
Only five percent of Americans have heard of Campylobacter as a problem in food.

Have you heard of Campylobacter as a problem in food?



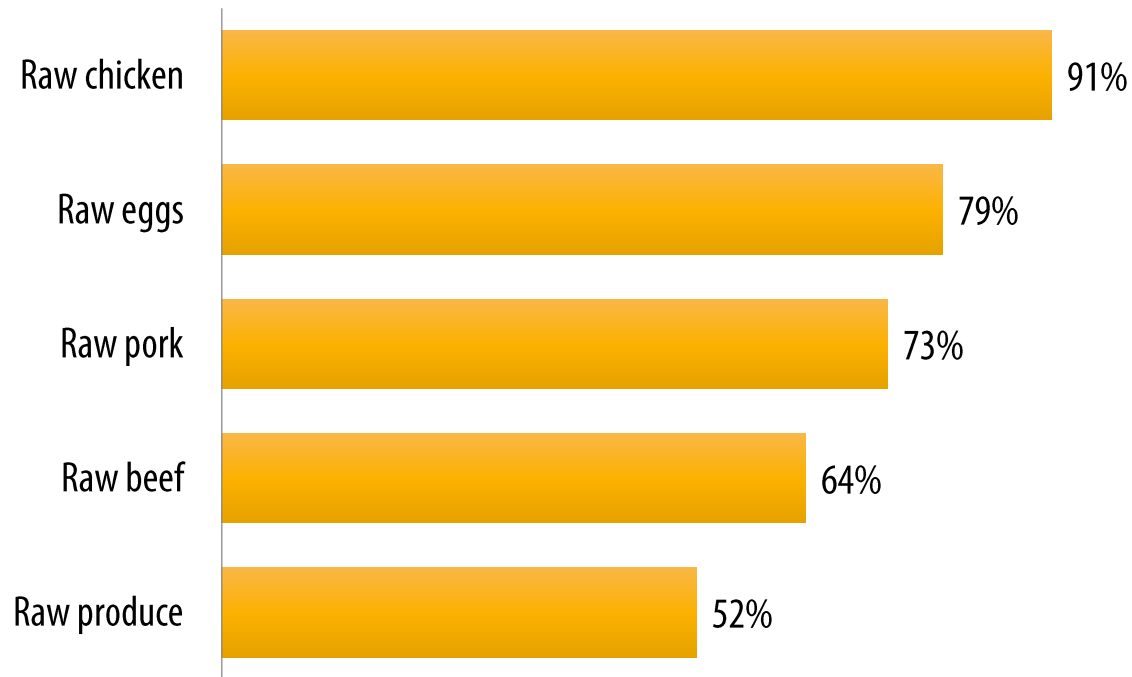
Nearly all Americans have heard of Salmonella as a problem in food.

Have you ever heard of Salmonella as a problem in food?



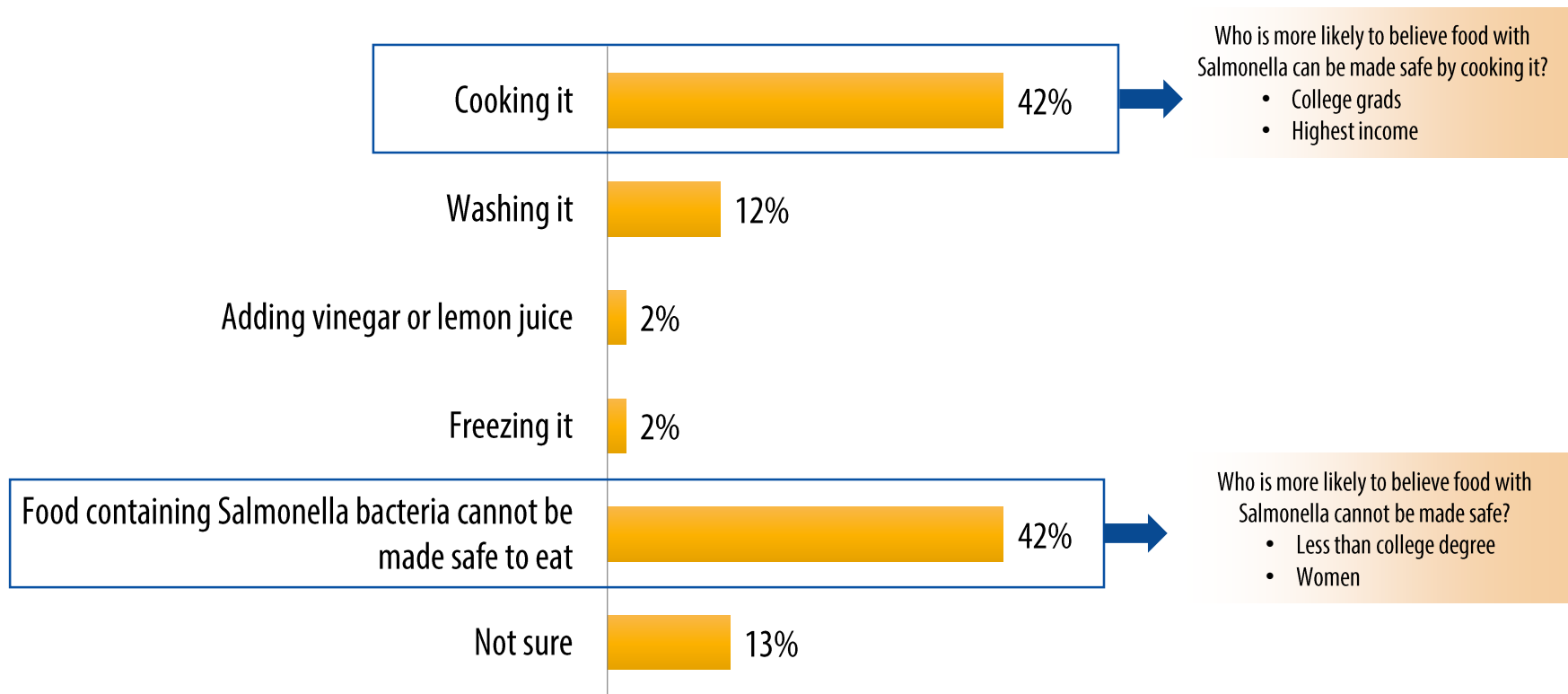
The belief that raw chicken has Salmonella is nearly universal among Americans, followed by three-quarters reporting raw eggs and raw pork as likely carriers.

How likely is it that the following foods have Salmonella germs that can make you sick?
(% 4-5 on a scale of 1-Not at all likely to 5-Very likely)



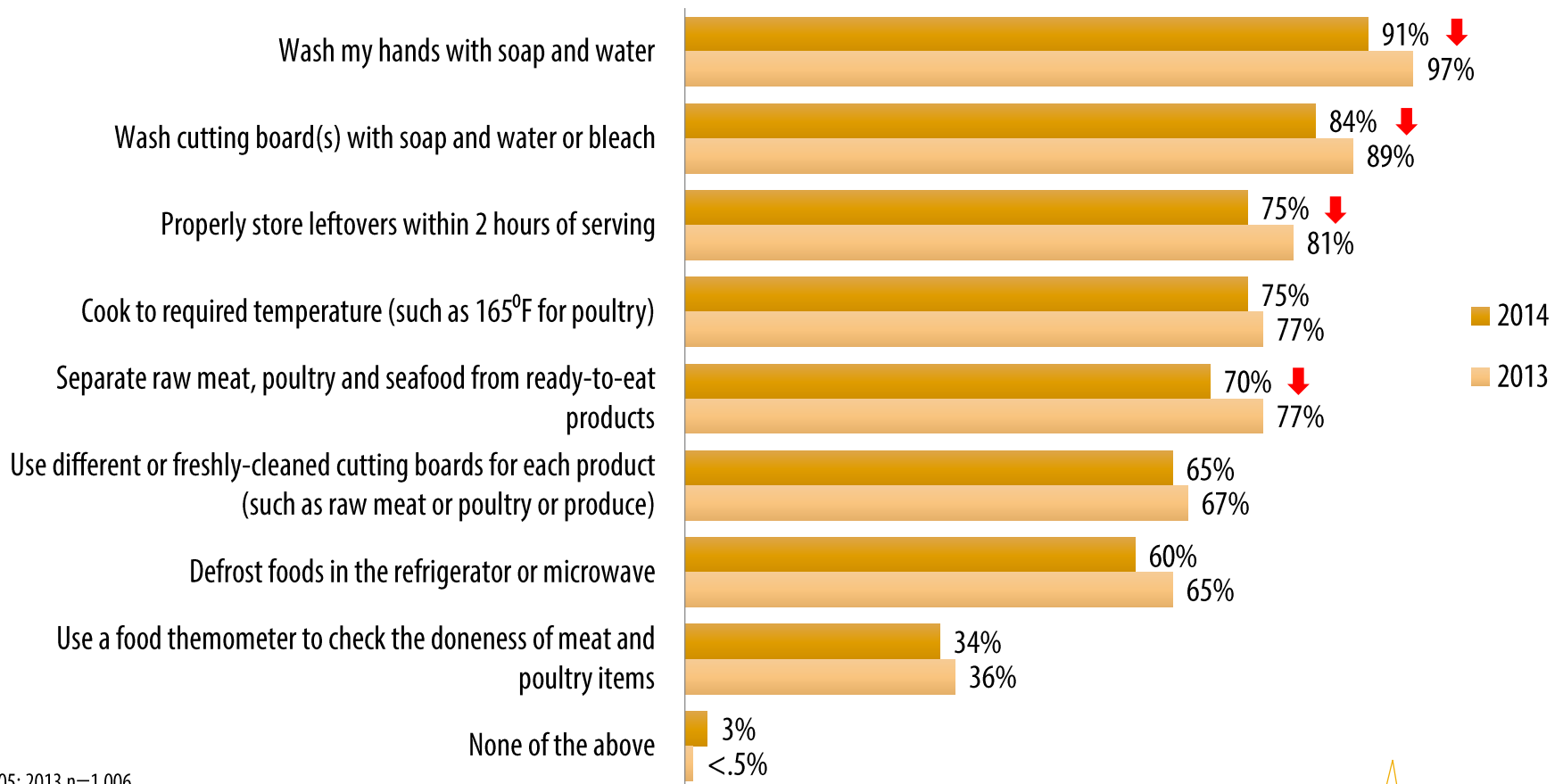
Two out of five Americans think that cooking food with the bacteria will make it safe to consume; a similar proportion feel that food with the bacteria cannot be made safe to consume.

To the best of your knowledge, which of the following would make something safe to eat if it had *Salmonella* bacteria on it? (Select all that apply.)



To accomplish food safety, most Americans wash their hands and cutting boards. Only a third of respondents regularly use a thermometer to check if their meat is cooked thoroughly.

Which of the following actions do you perform regularly when cooking, preparing, and consuming food products? *(Select all that apply.)*



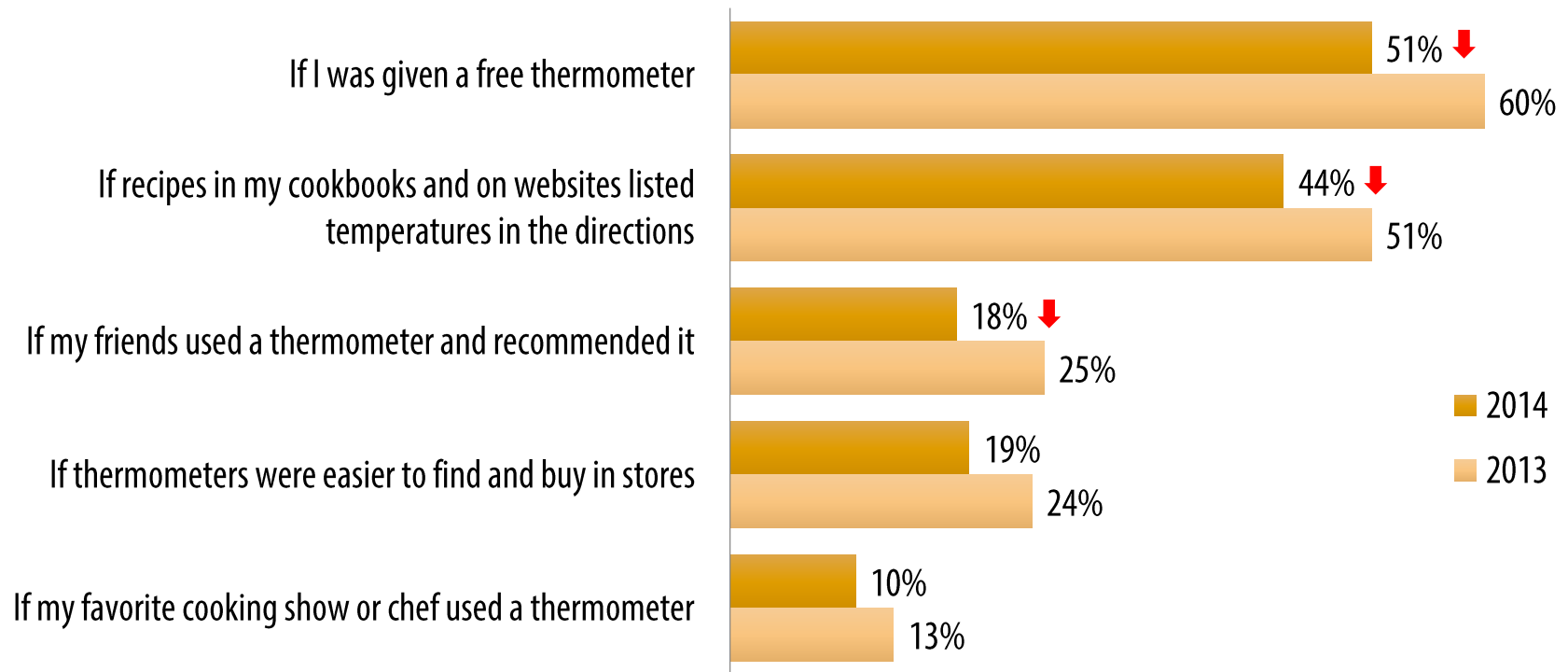
2014 n=1,005; 2013 n=1,006

Arrows indicate significant (.95 level) differences vs. 2013.

The majority of Americans would use a thermometer if they were given a free one; nearly as many would do so if their recipes listed temperatures.

Which of the following, if any, would encourage you to use a food thermometer more often than you do?

(% Yes)

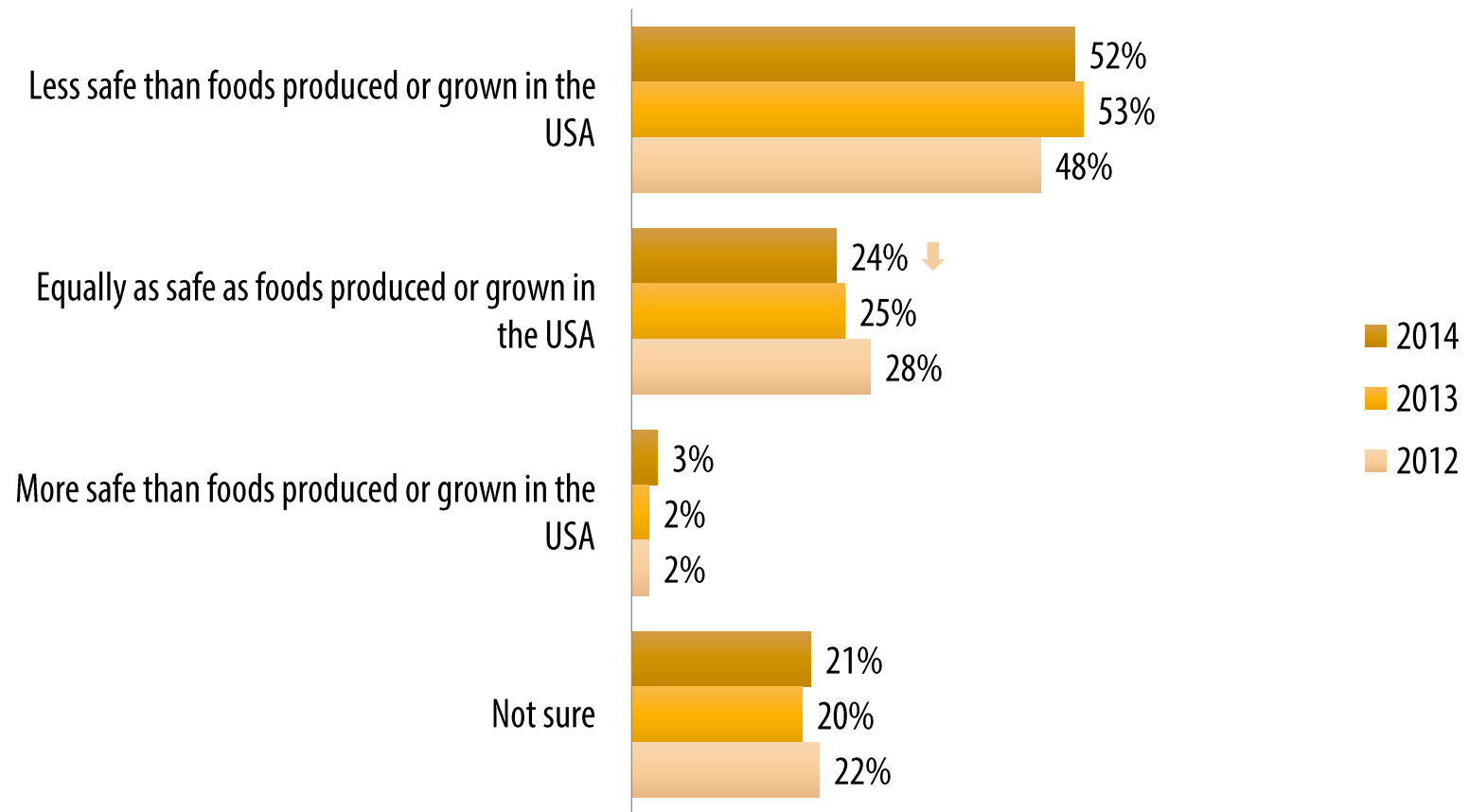


Not currently using a food thermometer: 2014 n=652; 2013 n=643

Arrows indicate significant (.95 level) differences vs. 2013.

Slightly more than half of all Americans believe that imported foods are less safe than foods produced or grown in the U.S.

In general, do you think that imported foods are...?

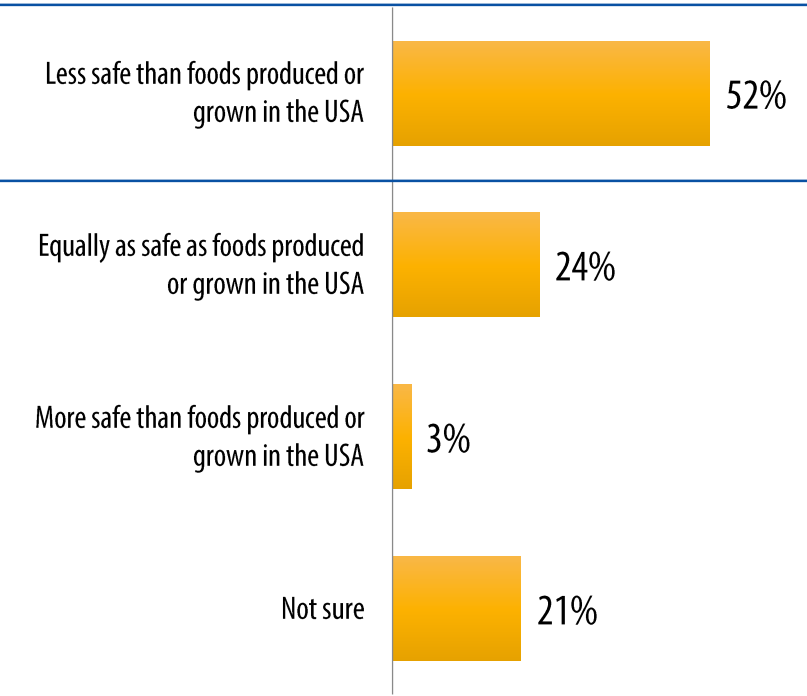


2014 n=1,005; 2013 n=1,006; 2012 n=1,057

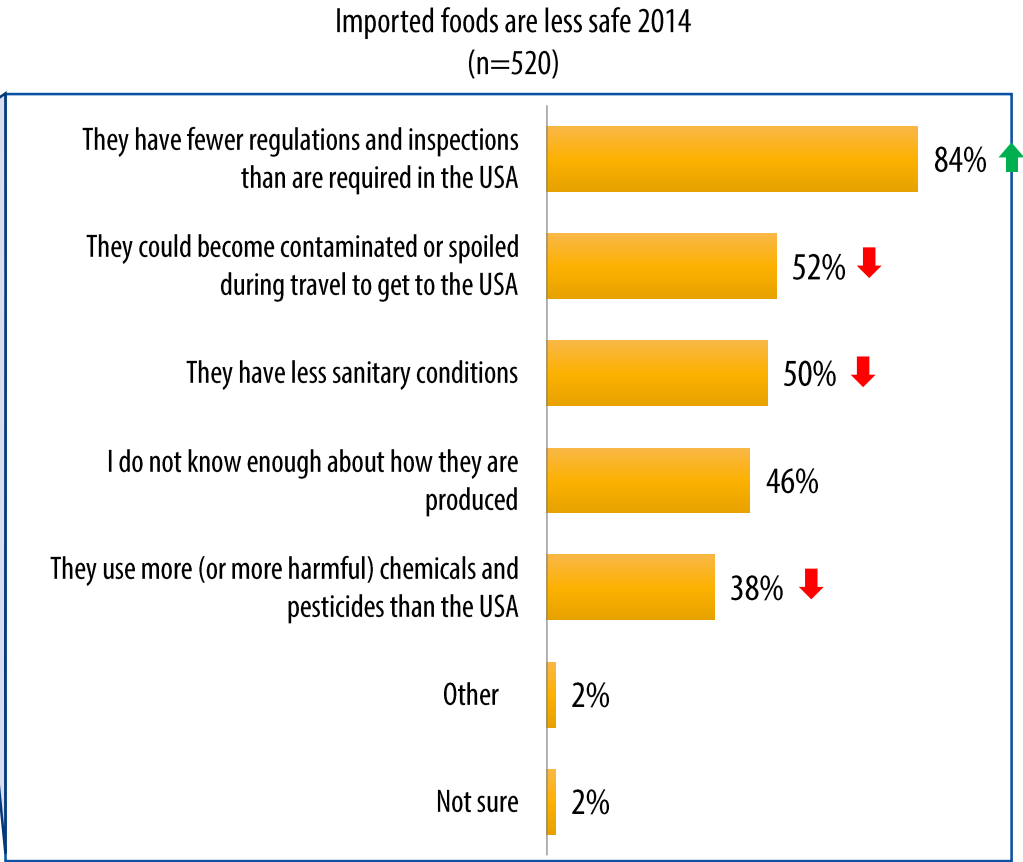
Arrows indicate significant (.95 level) differences vs. prior year(s); color of arrow indicates comparison year.

Those who think imported foods are less safe believe this is due to fewer regulations and inspections, and the possibility that food could become spoiled in transit.

In general, do you think that imported foods are...



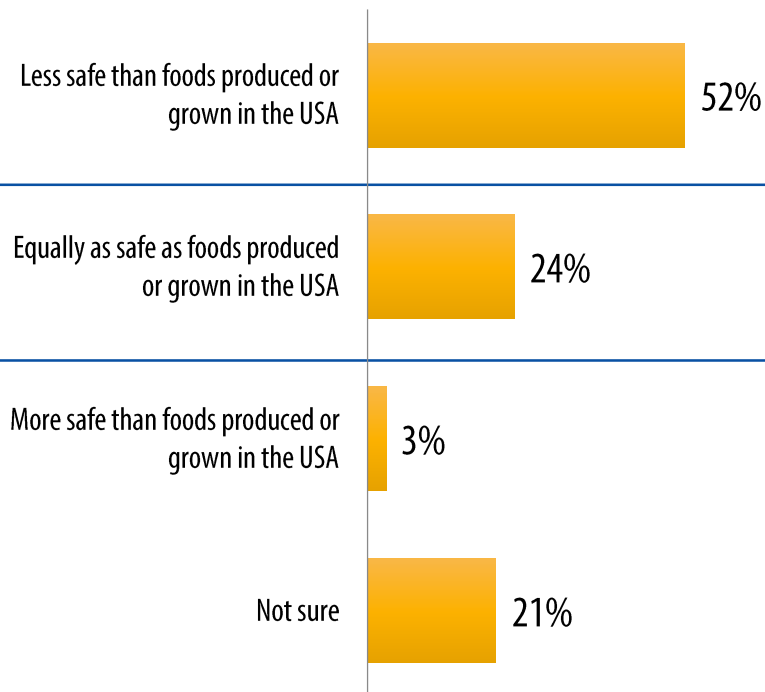
Why do you believe that imported foods are less safe than foods produced or grown in the USA? (Select all that apply.)



2014 n=1,005
Arrows indicate significant (.95 level) differences vs. 2012.

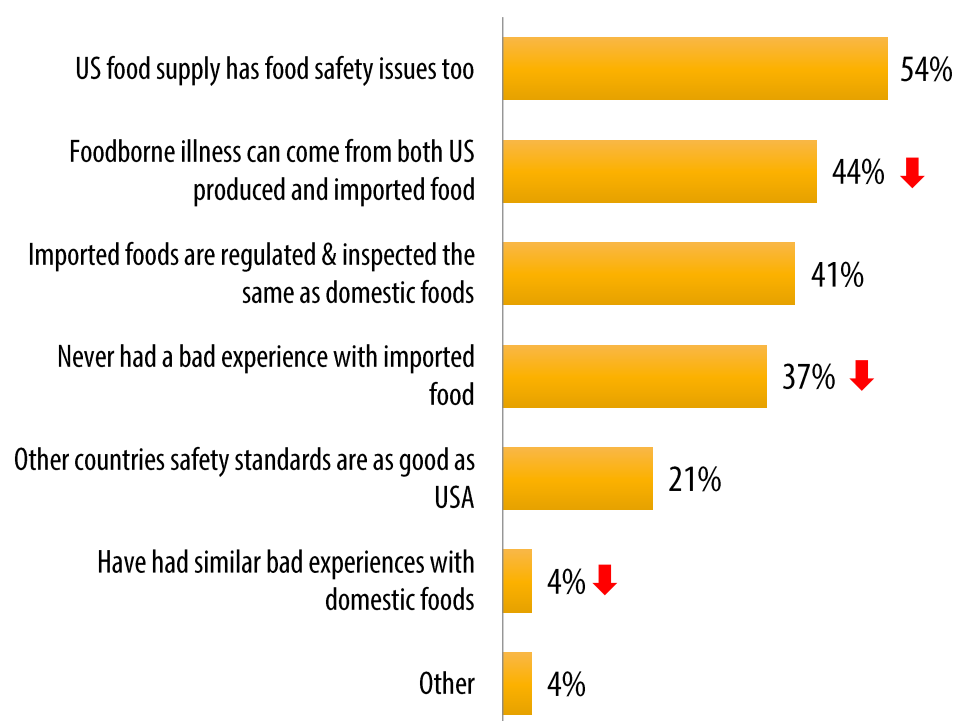
A quarter of Americans believe that imported foods are just as safe as those produced in the U.S. They believe the U.S. food supply also has safety issues, and that foodborne illnesses can come from any source.

In general, do you think that imported foods are...



Why do you believe that imported foods are equally as safe as foods produced or grown in the USA? (Select all that apply.)

Imported foods are equally as safe 2014
(n=247)

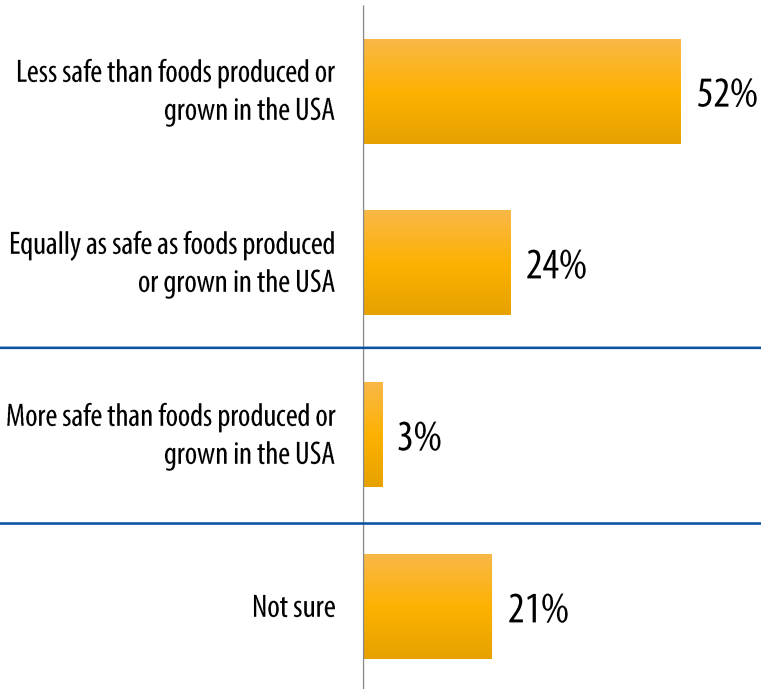


2014 n=1,005

Arrows indicate significant (.95 level) differences vs. 2012.

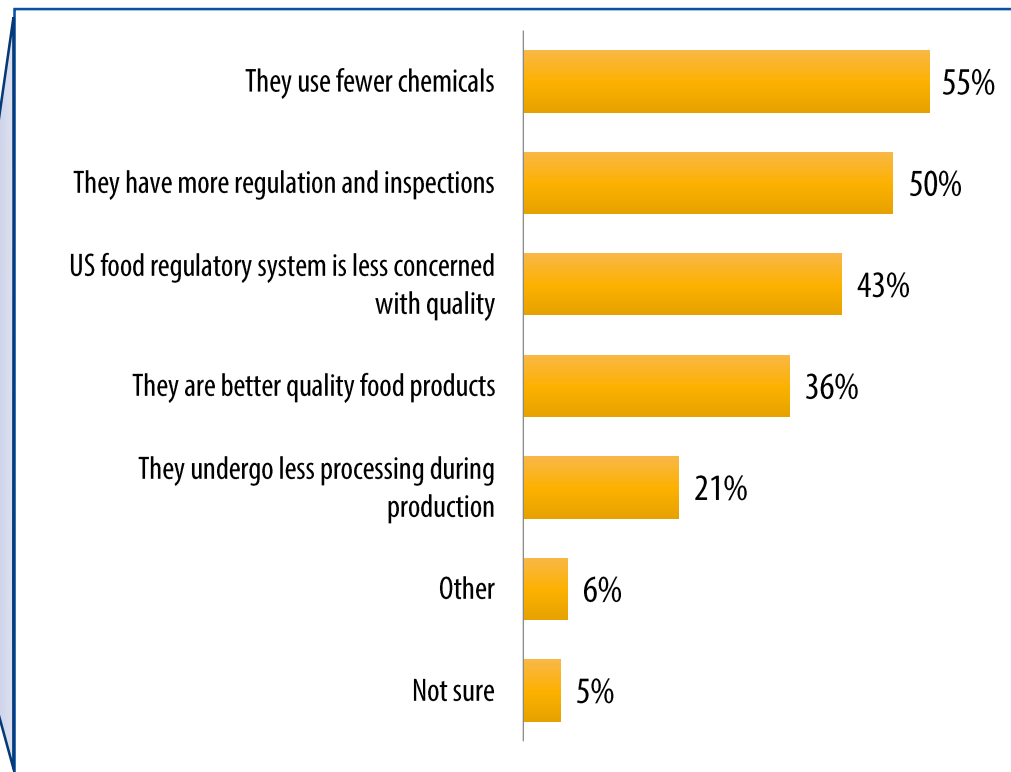
A small fraction of Americans believe that imported foods are safer than those grown in the U.S. They believe that imported foods are exposed to fewer chemicals, and undergo more rigorous regulations and inspections.

In general, do you think that imported foods are...

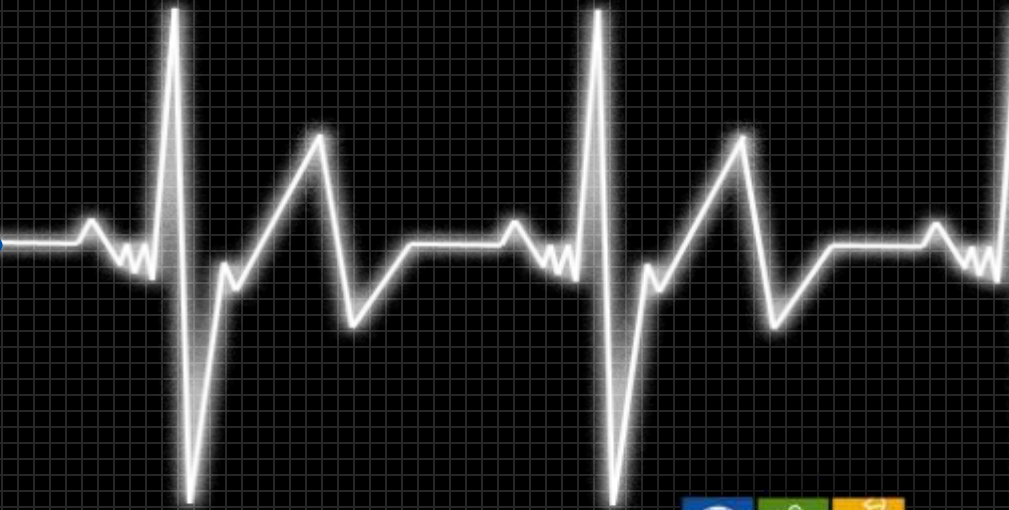


Why do you believe that imported foods are more safe than foods produced or grown in the USA? (Select all that apply.)

Imported foods are more safe 2014
(n=25)



DEMOGRAPHIC PROFILE OF RESPONDENTS



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Respondents were sampled to reflect the U.S. population for age, education, gender, race and ethnicity for those between 18 and 80 years old.

Age		Gender	
	(n=1,005)		(n= 1,005)
18 to 34 years old	31%	Male	48%
35 to 49 years old	26	Female	52
50 to 64 years old	26		
65 to 80 years old	16		
Education		Children Under 18 in Household	
Less than high school	5%	0 to 2 years old	6%
Graduated high school	37	3 to 6 years old	10
Some college (no degree)	19	7 to 12 years old	11
Associates degree or technical or vocational school	11	13 to 17 years old	13
Bachelor's degree	19	There are no children under 18 in my household	70
Graduate/Professional work or degree	10	Prefer not to say	2
Race/Ethnicity		Marital Status	
White (Non-Hispanic)	68%	Married	57%
Hispanic/Latino/Spanish descent	15	Single	23
Black or African American	14	Divorced	9
Asian or Pacific Islander	6	Living with partner	7
American Indian or Alaskan Native	1	Widowed	3
Native Hawaiian	1	Other	<.5
Other	1	Prefer not to say	1

Respondents accurately reflect the distribution across the four regions in the U.S.

Region	(n=1,005)
Northeast	18%
Midwest	21
South	37
West	23
Household Income	
Less than \$35,000	15%
\$35,000 to less than \$50,000	17
\$50,000 to less than \$75,000	20
\$75,000 to less than \$100,000	15
\$100,000 or more	20
Don't know	2
Prefer not to answer	12

Medical Conditions	(n=1,005)
High blood pressure	22%
High cholesterol	18
Heart disease	4
Diabetes	6
Overweight/obesity	7
Stress/anxiety/depression	10
Osteoporosis	2
Cancer	2
AD/HD	1
Stroke	<.5
None of the above	58